best for planning

Outline

Agenda

The beginning: cooperation, not confrontation

b4p best for planning.

5 media groups
1 common goal

axel springer

BAUER MEDIA GROUP

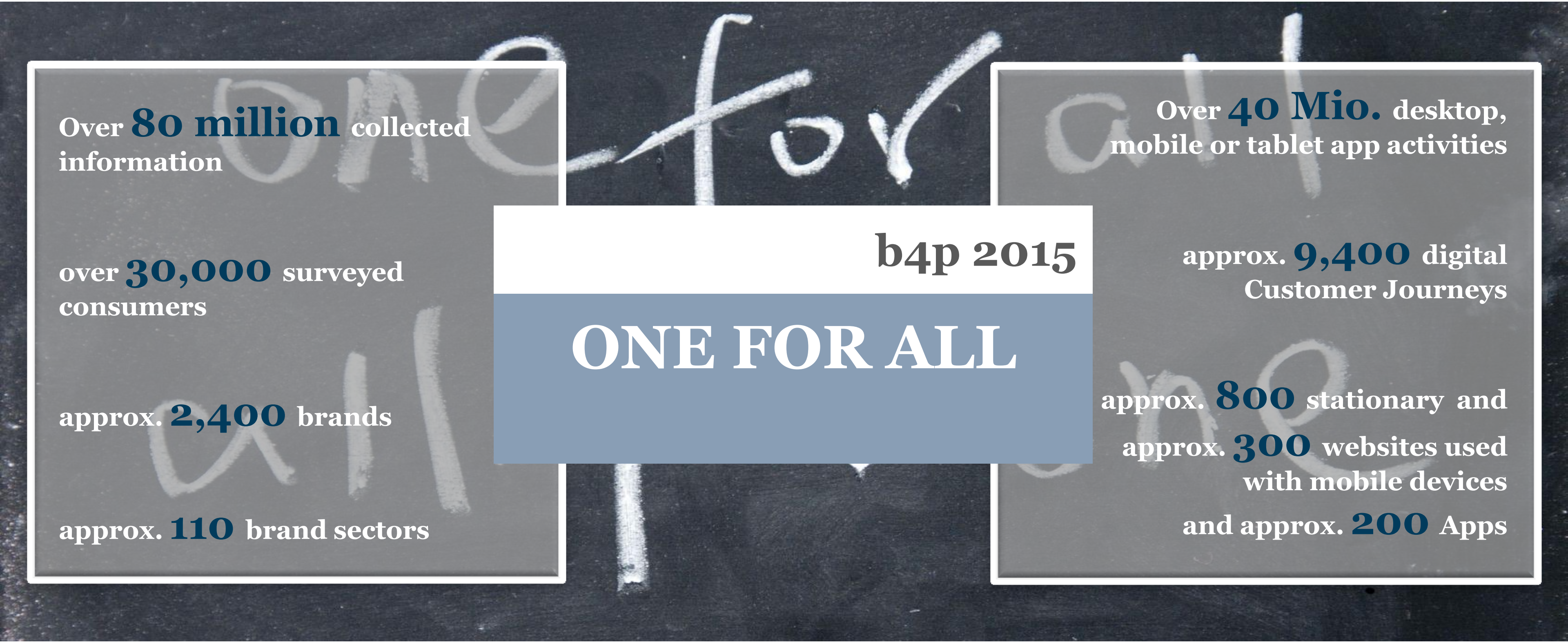
G+J

FUNKE MEDIEN GRUPPE

Hubert Burda Media

ALL People – ALL Media – ALL Markets

b4p best for planning.



Over **80 million** collected information

over **30,000** surveyed consumers

approx. **2,400** brands

approx. **110** brand sectors

b4p 2015

ONE FOR ALL

Over **40 Mio.** desktop, mobile or tablet app activities

approx. **9,400** digital Customer Journeys

approx. **800** stationary and approx. **300** websites used with mobile devices and approx. **200** Apps

Good reasons for best for planning

b4p is the first market media study that allows to plan with **media convergence**

- b4p provides all necessary performance data and key figures to make efficient media investments.

b4p makes media transparent.

- b4p offers an even wider range of media for analyses.
- For the first time in the history of market media surveys, the use of online and mobile websites was determined not only by interviews but was also technically measured.
- 200 Apps, 800 stationary and 300 websites used with mobile devices

b4p explains **markets** and reveals market trends.

- Apart from covering all advertising-relevant markets b4p also allows for detailed analyses in a number of sectors because of its especially high number of cases.
- approx. 2,400 brands from 110 market sectors

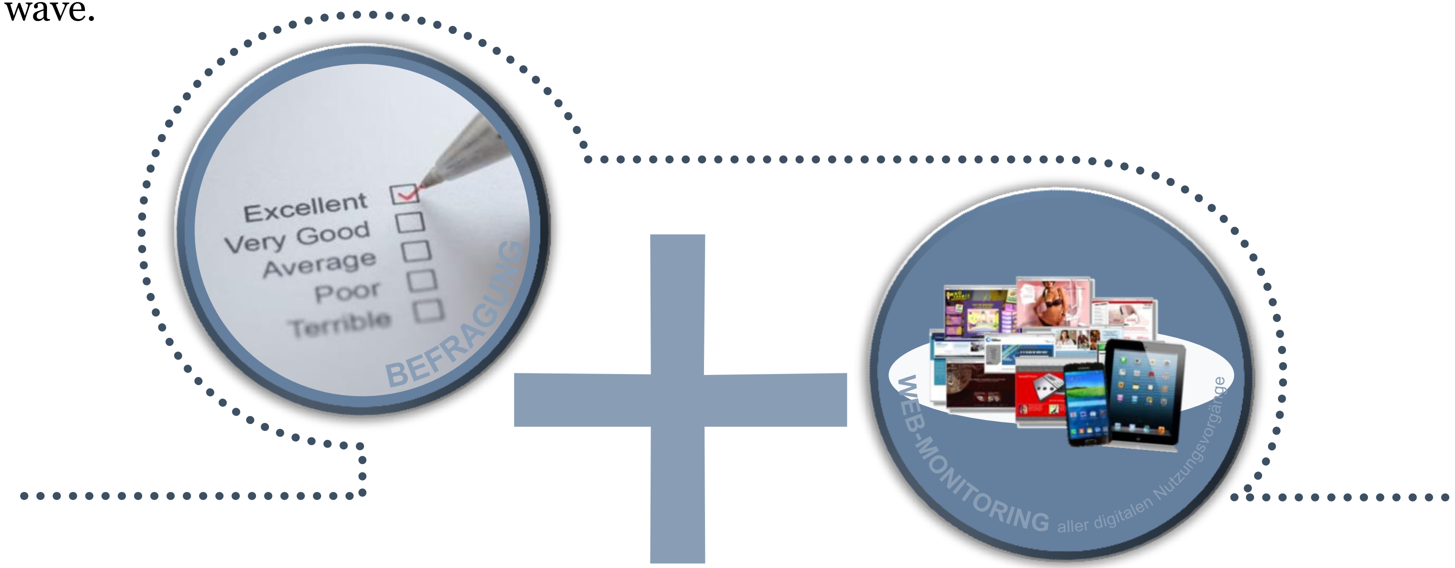
b4p converts **people** into target groups.

- The survey pinpoints everything that used to disappear behind the hard numbers of demographic data: interests, motivations, attitudes and needs.
- Over 80 million collected pieces of information of more than 30,000 consumers

Basics

Methodology	
Universe	German-speaking resident population over 14 years of age in Germany (69.24 million)
Sampling	ADM sampling, random address selection
Number of cases	30,177 cases
Institutes	GfK Media & Communication Research, IFAK, Ipsos, MARPLAN
Survey Period	September 2013 until April 2014 September 2014 until April 2015
Field model	Approx. 15,000 cases/year rolling system: summarization of two years outcomes into one edition
Questionnaire	CAPI (Computer Assisted Personal Interview), Media CASI (Computer Assisted Self Interview), markets in written form(self-completion questionnaire), technical measurement(parallel wave)

- Regarding the use of websites, stationary as well as mobile, essential innovations have been introduced in b4p 2014.
- **Querying** selected sites and apps has been complemented with **technical measurement** by a parallel wave.



Technical Measurement (Parallel wave)

- The technical measurement of internet usage was conducted in the GfK Media Efficiency Panel (MEP).
- In the course of a parallel wave, essential contents of the b4p questionnaire, among them coverage queries of classic media, were also sent to and queried among approx. 9,400 panel participants of the MEP.
- Subsequently online use of these participants was tracked for a time span of 3 months (January – March 2015).
- In addition to that approx. 2,500 panel participants of the GfK panel were technically measured to collect mobile usage data, complemented by another approx. 600 panel participants of the GMI Online-Access-Panel.

People

Interlink data in a meaningful way
6
PEOPLE
The classic approach to media planning is the planning in line with buyer and user target groups within the appropriate product and/or service sector. In the context of the "market" sector b4p here provides differentiated information.
Target groups can also be defined by their demographic characteristics. As different age groups, sexes, occupational groups differ significantly in their behaviour b4p offers the full spectrum of the standard demographic characteristics.
In recent years qualitative target group models have increasingly impacted marketing planning, allowing new communication planning approaches to differentiate depending on values, lifestyle and preferences while taking into account the psychologically different brand positions as early as in the target group definition phase.
b4p offers very diverse target group models differentiating users according to life phases or socio-economic status, values, personal attitudes, lifestyle and specific preferences with respect to individual product sectors ("sector typologies").

People: Demographics

Interviewee

- Age
- Sex
- Nationality
- Religious affiliation
- Marital status
- Body Mass Index, height, weight

Occupation

- School-leaving qualification/ occupational training
- Occupation
- Professional status
- Personal income
- Income earners
- NEW: commercial sector

Residential area

- Size of village, town or city
- Nielsen areas
- Nielsen metropolitan areas
- Government districts
- Federal states
- Urban/Administrative district

Life situation

- Life situation
- Stages of life
- Life cycles

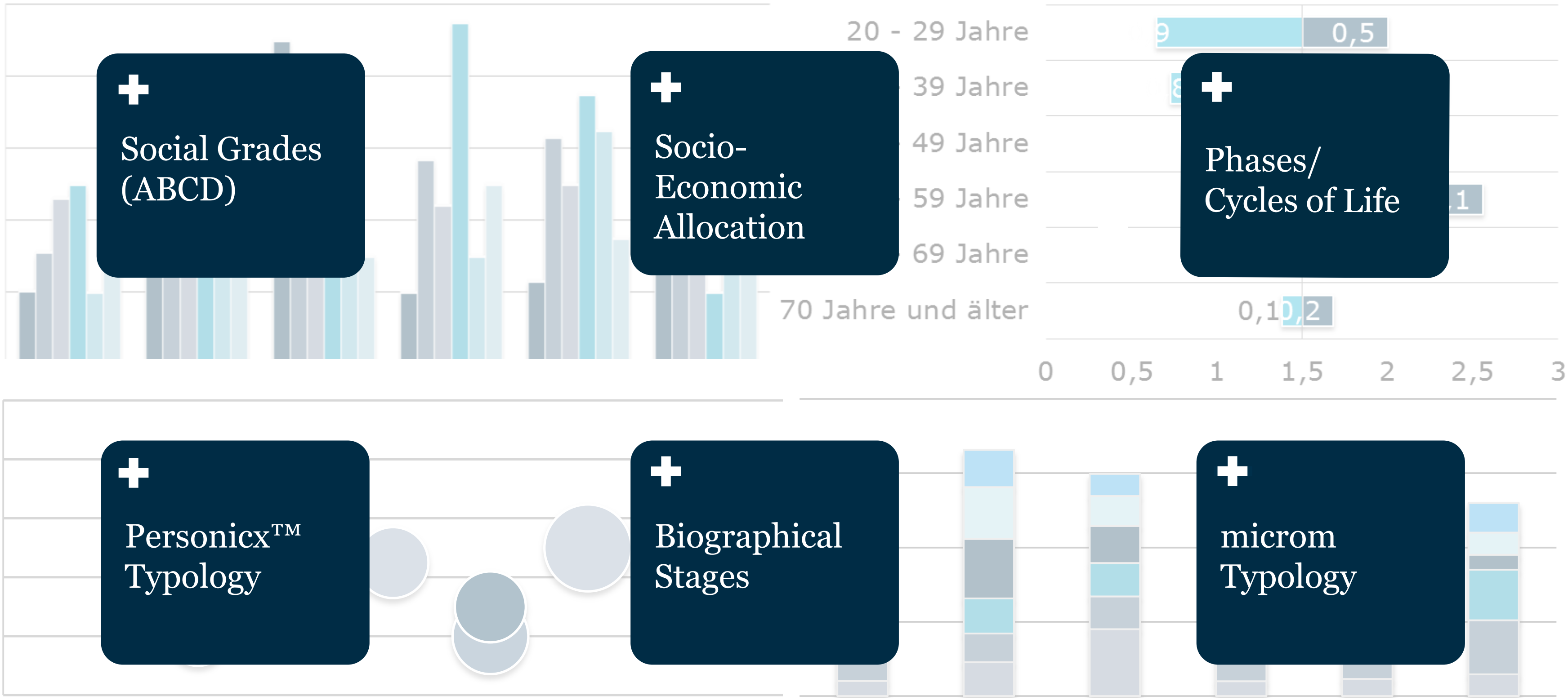
Household

- Household size
- Main income earner
- Household management
- Children/grand cildren in household
- Net household income
- Real disposable income

Mobility

- Mobility
- Use of transportation
- Public transport
- Commuting

People: Demographic Target Groups



b4p offers a glimpse behind the demographic scenes

Motivations

Needs

Interests

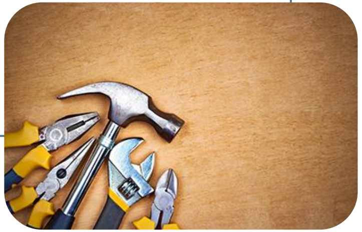
New in b4p 2015

- Vegetarian diet
- Statements on shopping behaviour, e.g. use of price comparison platforms on the internet
- Construct type „Promotional responsiveness Internet“
- Interest in magazine topics, e.g. soccer
- …

People: Psychographic Characteristics

Statements on Change (10)

- I am about to change jobs
- I will become self-employed
- I will marry
- I will emigrate
- …



Leisure (58 Items)

- NEW: Visiting sports events (except association football)
- NEW: Visiting stadium soccer matches
- Spending time with my family
- Reading magazines
- …

Aspects of Life (18)

- Large circles of friends
- Professional success
- Sound environment
- Individuality
- Experience lots of things
- …

Spheres of Life (39)

- NEW: Luxury makes life better
- NEW: I try to stay fit by doing sports regularly
- I gladly take on responsibility
- …

People: Psychographic Target Groups

Limbic®-Types (7)

SIGMA-Milieus® (10)

Personality Factors (5)

Interest Horizons (4)

Sinus-Milieus® (10)

The New Alphas

The Lohas – Lifestyle of Health and Sustainability

People: Market-Based Target Group Models

Gambling

Consumer Typologies in various sectors (10)

Brand Orientation

ADAC · ASPIRIN · adidas · CHANEL · NIVEA · Exquisa · 1&1

Brand Loyalty

Smart Shopper

Interlink data in a meaningful way
4
MARKETS
With an extensive survey of more than 2,400 brands in 110 markets sectors b4p is the most comprehensive market media study on the German market and hence offers an abundance of differentiated target group descriptions to all users.
Within FMCG sector b4p features the option to differentiate target groups into product users, product buyers and brand users. In the durable goods sector the option to choose "available in the household" and "acquisition intention" is consistently available.
Moreover an abundance of other market relevant characteristics is offered in various markets: For instance brand/price awareness, places of purchase, intended purpose, purchasing decision makers, attitude towards the products and many more.
The picture is completed by sector typologies describing additional target groups in the car, travelling, fashion, beauty, living, food, health and finance markets.

b4p is designed to perform all media planning tasks:

- b4p represents all markets relevant for advertising
- Diversity and relevance for planning are the most important criteria for market descriptions
- Brands were included depending on their size and relevance for advertising
  - All big-players of every market
  - Minimum basis (number of cases) for designation depending on the market generally 1% or 300 cases
  - Advertising brands preferred
  - Primarily umbrella brands, subbrands only if they are perceived as independent by the interviewee.

Consumer Goods

- Food
- Cosmetics
- Health

- Frequency of Usage
- Purchase
- Usage of Brands

Services

- Travelling
- Finance and Insurance
- Retailing

- Available in Household/ concluded
- Purchase Intention
- Provider Preference
- Places of Purchase

Durable Goods

- Fashion
- Consumer Electronics
- Home and Living
- Car and Mobility

- Available in Household/ Personal Ownership
- Purchase Intention
- Brand Ownership
- Brand Preference

Markets: Comprehensive Features

Purchasing Decisions (22)

- Tablet computer
- Pay TV subscription
- Second car in the household
- Planning/Booking holiday trips
- Financial investment
- ...

Statements (97)

- I choose regional products as far as possible
- I read about fashion news in magazines
- A car must have character, it should not be perceived as boring and ordinary
- ...

Interest in Product Information (39)

- Decorative cosmetics
- Bags, Travel bags, Leather goods
- Apps/Applications for mobile phones
- Garden products/Plants/ Garden appliances
- Short trips
- ...

Role as Advisor (14)

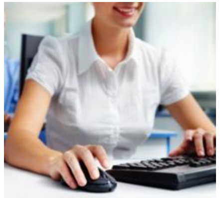
- Consumer Electronics
- Fashion
- Cosmetics
- Food
- ...

Brand/Price Awareness (55)

- Non-alcoholic beverages
- Confectionery, snack items
- Perfumes/Scents/Eau de toilette/ Aftershave
- Mobile phones, Smartphones
- ...

Which sources of information do you generally use when you want information about products, brands or services before making a purchase?

- 14 Items
  - Test reports in magazines
  - Articles in magazines or newspapers
  - Reports on television
  - Catalogues
  - Trade journals
  - Advice from specialised shop
  - Recommendations by friends, acquaintances (personal, internet)
  - Websites of manufacturers or brands
  - Test reports on the internet
  - Search engines
  - Recommendations by rating portals (e.g. Yelp, Tripadvisor)
  - Ratings on other websites (e.g Amazon)
  - Price comparison websites
  - Information in social media portals (e.g. Facebook)



Markets: What is new in b4p 2015?

New brands in…

- Fruit juices
- Beer
- Hair care
- Perfumes and scents – women
- Painkillers
- Jewellery
- eBook readers
- Printers/Multifunctional peripherals
- Living room and kitchen furniture
- Car makes
- Online travel operator
- Insurances
- Shopping venues/Places of purchase Consumer Electronics
- …

Markets: Sector-Typologies

Finance

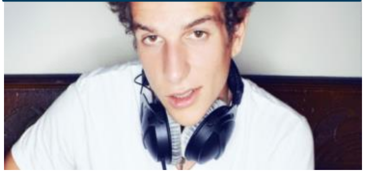
Health

Living

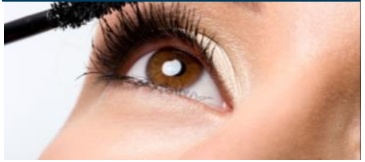
Travelling

Fashion Women

Fashion Men



Beauty Women



Beauty Men

Food

Cars & Mobility

Brand Loyalty

Enquiries:

- How many different brands does a target group use in a specific product sector?
- How many brands are used in a product sector on average?
- How many other brands do consumers use in the same product sector, i.e. how loyal are they to their brand?

Calculation of “brand loyalty“:

- The number of brands used is calculated for every product sector and for every interviewee.

Presentation of “brand loyalty“:

- Average number of brands used for the whole (loyalty in total)
- Average number of brands used for every individual target group
- Analysis in categories for the use of brands (number of consumers who use 1-3 or 4-5 etc. other brands)

Smart Shopper

Definition:

- Hybrid consumers who attach importance to the brand as well as to the price
- No bargain hunters (looking for offers in the lowest price segment)

Compilation:

- Compilation with the help of 55 market related queries on price/brand orientation by a sum scale of the respective occurrence “I attach importance to the price as well as the brand“

Assessment:

- Top 10: upper 10 per cent of this scale (affirmation in at least 37 of 55 instances)
- Top 20: upper 20 per cent of this scale (affirmation in at least 30 of 55 instances)

Media

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Interlink data in a meaningful way

5

MEDIA

As in the previous year, b4p incorporates all media types which are relevant for media planning: over 180 magazine titles, all supra-regional daily newspapers available, 64 booking units of regional newspapers, 10 TV stations, all "ma" radio stations, data on posters and cinema and some smaller media.

In addition to that b4p contains a wide range of digital offers representing a major part of stationary online and mobile smartphone use. Furthermore we present a large number of "ma" online offers – if they are licensees – as well as online booking units of several, essential media partner websites. Once again in this year a great number of apps is also represented in the survey.

As in the previous year the extension of the online media offer is facilitated by continuous technical measurements of stationary and mobile internet usage as well as of apps. You can find a description of our methods starting on page 308.

Beyond media coverage, all other characteristics, which are familiar to you from b4p and are helpful for media planning, are also represented: The users' motivation and activities in the various digital media with different devices, attitude towards social media, privacy and acceptance of advertising in the respective media. As a highlight many media characteristics have been condensed into our media user typology.

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Media in b4p

- 180 Popular magazines, reader circle
- 4 Supra-regional daily newspapers, 65 Booking units of local daily newspapers
- 816 Onlineangebote (Big Screen), 427 Booking units
- 288 Mobile Sites/MEWs, 196 Apps
- Posters
- Radio
- 10 TV stations, Cinema

Just like ma Online and ma Intermedia-Plus, b4p 2015 also presents user per month (NpM), per week (NpW) as well as per day (NpT) for….

- 238 websites, adjusted to the value determining study ma 2015 Internet 10
- 577 websites more which have not been represented in ma Internet
- 289 mobile accessed (by smartphone) websites /MEWs
- 196 apps

Good for planning: Once again b4p's vast universe of digital media is extended considerably.

Print representation is based on value determining studies

Representation requirements for print media

- Magazines suitable for ma (Mediaanalysis)
  - Registration and representation in the ma
  - Adjustment to ma
- Magazines not suitable for ma (such as Corporate Publishing)
  - Representation in the AWA and minimum number of cases
  - Adjustment to AWA
- Status as a licensee
- Relevance for the advertising market

Coverages are adjusted to established values wherever possible

„ma-World“

Adjustment to ma

- Print
- TV
- Radio
- Poster
- Websites included in ma Online
- Cinema

Not „ma-World“

Adjustment to AWA

- Free titles
- Title which are published less often than monthly

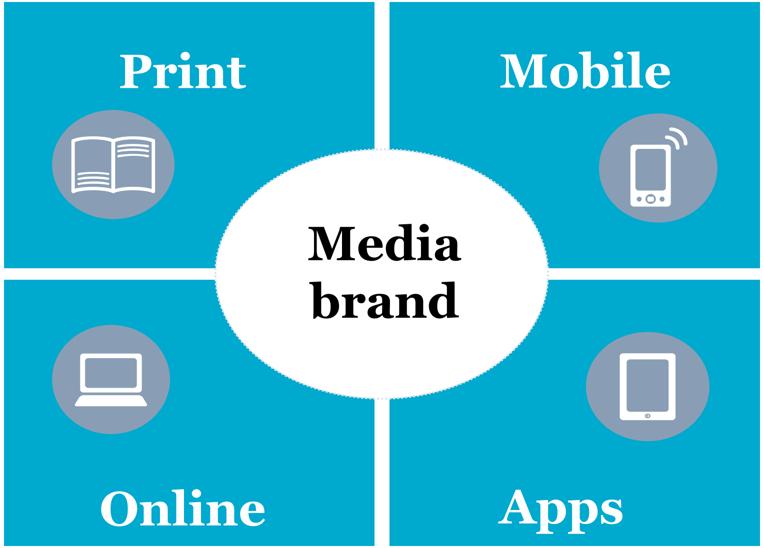
No Adjustment

- Websites (not included in ma Online)
- Mobile Use of Smartphone, MEWs
- Apps

! Coverage adjustments are up-dated regularly

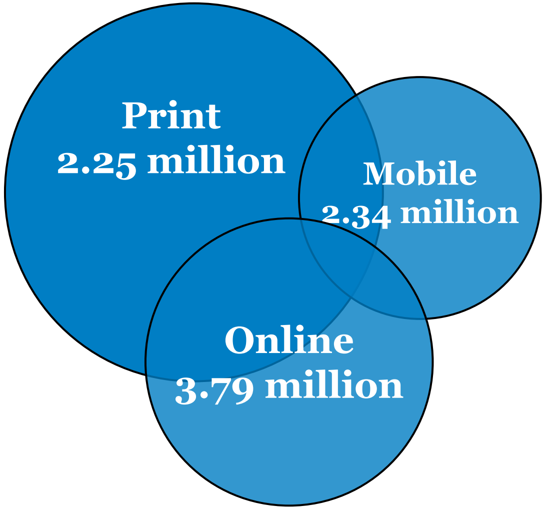
Representation of 79 cross-media brands

- All published components of media brands, as far as they are represented in the survey, are merged into a „cross media brand coverage“
- Requirements for the evaluation:
  - Print coverage
  - Perceivable brand image from consumer's point of view
- Performance data:
  - User per day for daily and weekly newspapers;
  - User per week for daily newspapers and weekly magazines;
  - User per month for all magazines published at least once a month
- The standard for the shortest unit of time is the publication frequency of the print media
- For print media, the coverage of all issues which are allocatable to the respective period apply



Evaluate overlaps of media channels and total coverage with b4p

Net coverage WELT: 7.59 million – weekly coverage print, online, mobile

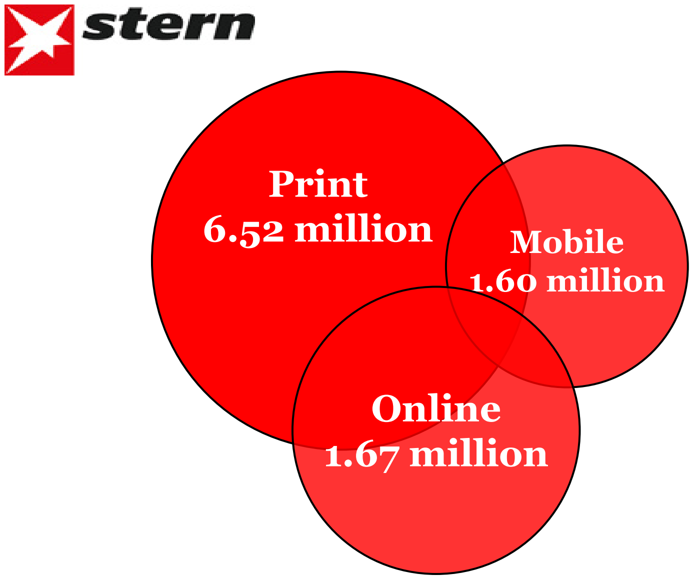


Overlapping
(on weekly basis)

	in Mio.
• WELT (Print)/welt.de	0.28
• WELT (Print)/WELT Mobile	0.21
• welt.de/WELT Mobile	0.36
• WELT (Print)/welt.de/WELT Mobile	0.06

DIE WELT Print: reader per issue DIE WELT (6x) + WELT am SONNTAG
welt.de: online usage (Big Screen)
welt Mobile: Mobile usage welt.de/MEW as well as via apps

Net coverage stern: 9.12 million – weekly coverage print, online, mobile

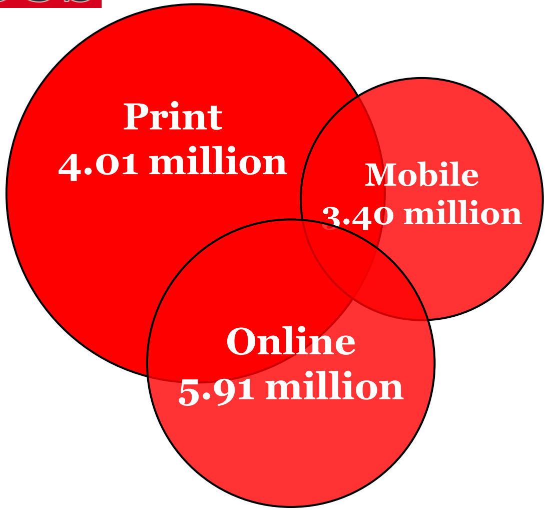


Overlapping
(on weekly basis)

	in Mio.
• stern (Print)/stern.de	0.24
• stern (Print)/stern Mobile	0.28
• stern.de/stern Mobile	0.19
• stern (Print)/stern.de/stern Mobile	0.04

stern Print: reader per issue stern
stern.de: Online usage (Big Screen)
stern Mobile: Mobile usage stern.de/MEW as well as via apps

Net coverage Focus: 11.88 million – weekly coverage print, online, mobile

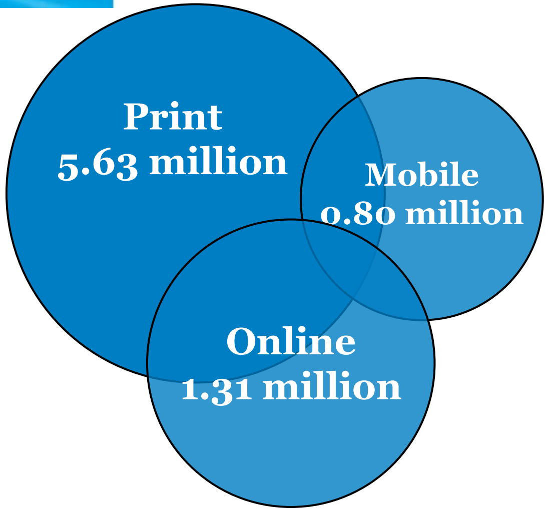


Overlapping
(on weekly basis)

	in Mio.
• Focus (Print)/focus.de	0.49
• Focus (Print)/Focus Mobile	0.33
• focus.de/Focus Mobile	0.71
• Focus (Print)/focus.de/Focus Mobile	0.08

Focus Print: reader per issue Focus
focus.de: Online usage (Big Screen)
Focus Mobile: Mobile usage focus.de/MEW as well as via Apps

Net coverage TV Movie: 7,24 Mio. – monthly coverage print, online, mobile

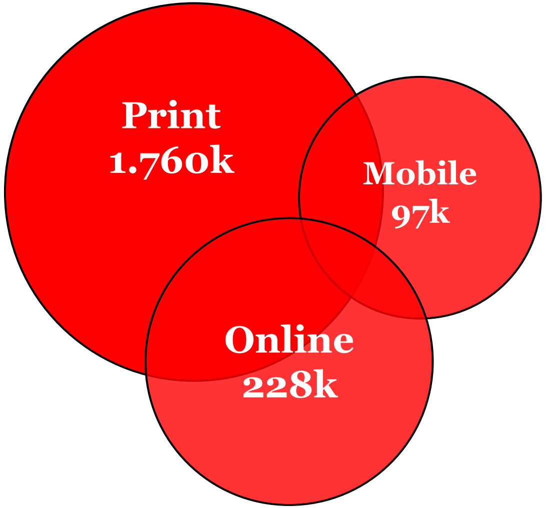


Overlapping
(on monthly basis)

	in Mio.
• TV Movie (Print)/tvmovie.de	0.31
• TV Movie (Print)/TV Movie Mobile	0.12
• tvmovie.de/TV Movie Mobile	0.08
• TV Movie (Print)/tvmovie.de/TV Movie Mobile	0.01

TV Movie Print: reader per issue TV Movie (2x)
tvmovie.de: Online usage (Big Screen)
TV Movie Mobile: Mobile usage tvmovie.de/MEW as well as via Apps

Net coverage Funke NRW: 2.019k – daily coverage print, online, mobile



Overlapping
(on daily basis)

	in thousand
• Funke Medien NRW (Print)/derwesten.de	34
• Funke Medien NRW (Print)/WAZ Mobile	26
• derwesten.de/WAZ Mobile	9
• Funke Medien NRW (Print)/derwesten.de/ WAZ Mobile	3

Funke Medien NRW Print: reader per issue Funke Medien NRW 850 Gesamtausgabe inkl. IKZ
derwesten.de: Online usage (Big Screen) Der Westen OMS
WAZ Mobile: Mobile usage WAZ/MEW

Qualitative Media-Insights enough and to spare

b4p best for planning.

Statements on Media Use (14)

- I use media primarily to obtain information
- It is important to me to have reliable sources of information
- I use media in particular to relax and unwind
- ...

Statements on Advertisements in 9 media genres (11)

Advertisements in ...(PZ, TZ, TV, etc.)...

- ...are informative
- ...encourage to buy
- ...are authentic
- ...are entertaining
- ...

Statements on Internet/Social Media (9)

- NEW: I have often reported on the internet about my experience with products and services and written comments for valuation websites or similar websites
- Since you never know who you are dealing with, I am very cautious on the internet
- ...

Thematic interests Magazines (28)

- NEW: Garden and Plants
- Food, Cooking, Recipes
- Partnership
- Stars, Celebrities
- Soccer
- ...

Popular TV Genres (65)

- Reality-Shows
- News
- Crime
- Car Racing
- Daily Soaps
- ...

Activities on Internet (15)

- Sending emails
- Instant Messaging
- Accessing news and other information via media pages
- Maintaining job-related contacts
- ...

New in media: Survey on second screen

Basic question

How often do you use your smartphone or tablet computer to browse the internet or chat with friends while watching TV?

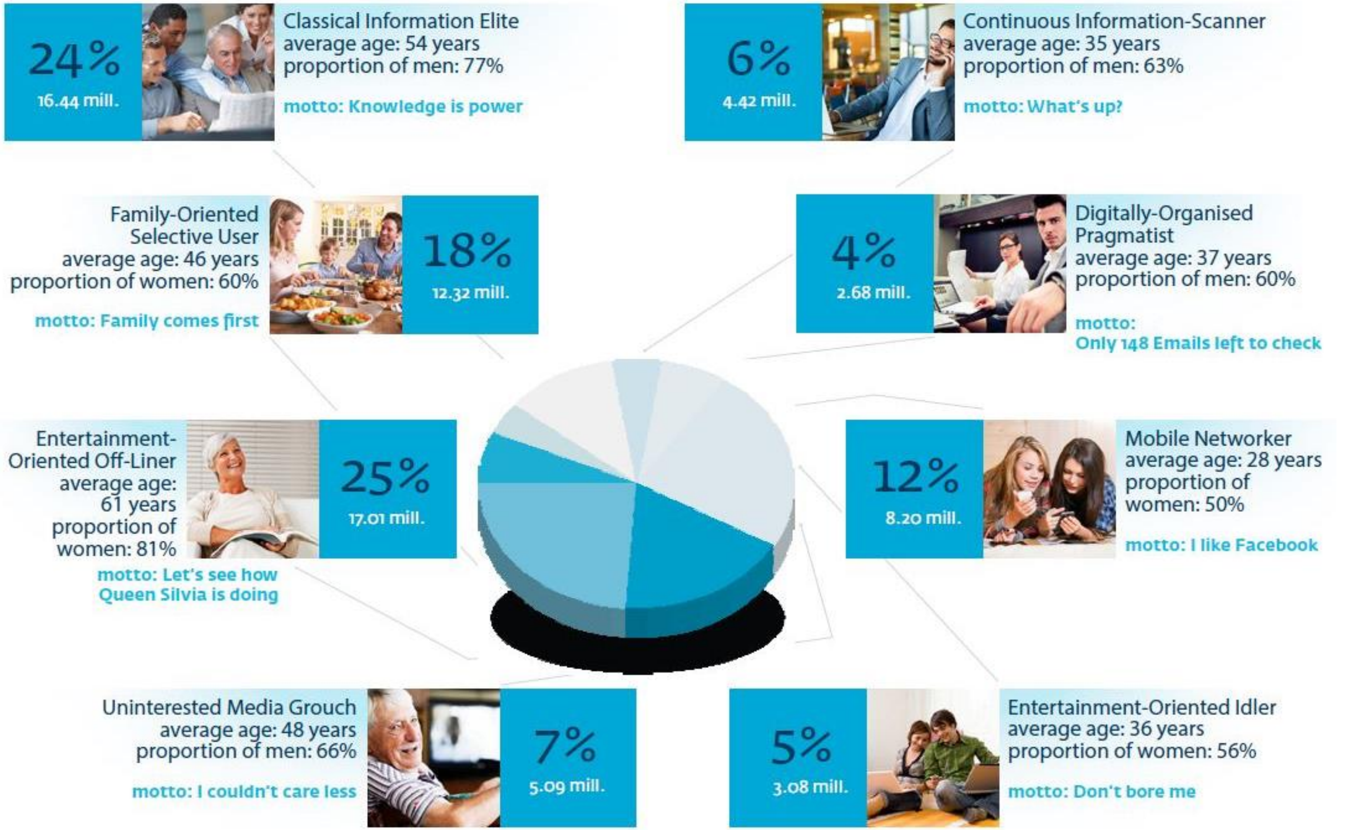
- Regulary (30%)
- Occasionally (45%)
- Never (25%)

And when and why do you do this?

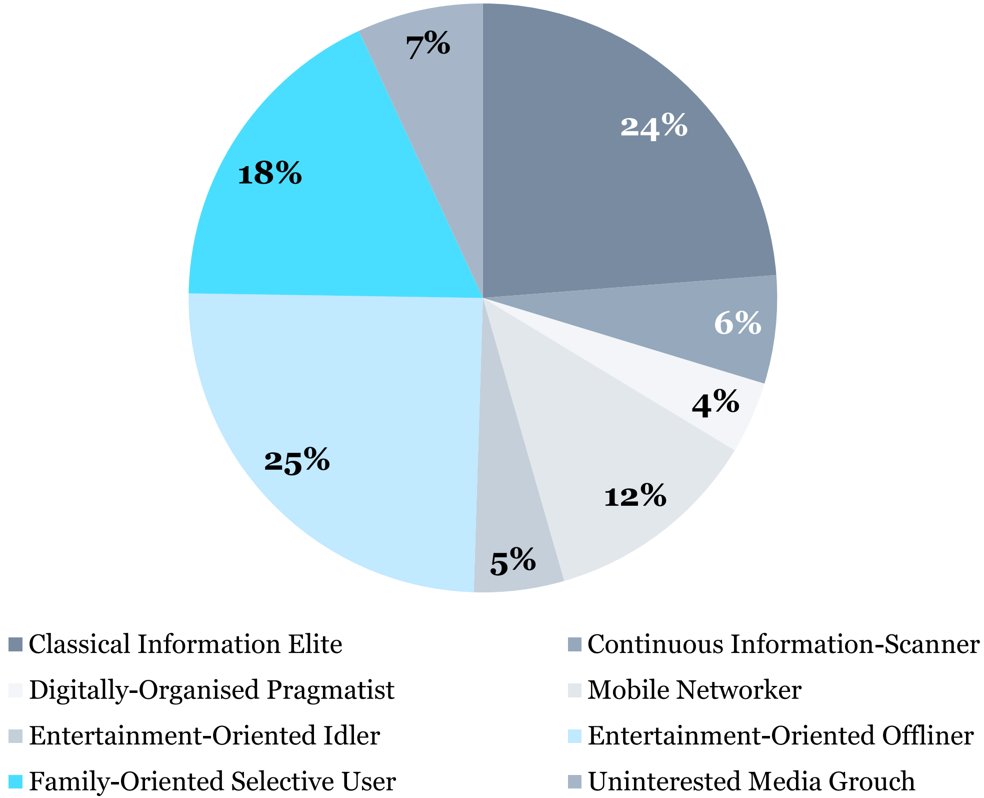
- ...mainly during commercials (68%)
- ...to divert myself if the program is temporarily boring (69%)
- ...I only use the TV as background noise (35%)
- ... look for background information, talk about current program with friends (30%)
- ...for things which have nothing to do with the current TV program, e.g. work, browse the internet (etc.) (68%)

Base: Smartphone-/Tablet-User = 13.996 cases = 100% (46,4% of total population)

Media User Typology



Media User Typology



Media User Typology Outline I

- **Type 1: Classical Information Elite**
  (Total share: 24%, 16.44 million, average age: 54 years, proportion of men: 77%)
  The highly educated, high-income type attaches great importance to in-depth, reliable news from economy, politics and science and primarily relies on proven print publications respectively their online offers. Ownership of tablet computers and smartphones as well as usage of social networks are below average.

- **Type 2: Continuous Information-Scanner**
  (Total share: 6%, 4.42 million, average age: 35 years, proportion of men: 63%)
  They have a high level of formal education and a net income far above average and they are permanently in contact with some type of media. They seek in-depth information, escape and inspiration several times a day, at anytime and anywhere. The Info-Scanners use digital media avidly, almost all of them have tablet computers and smartphones. App usage is far above average. They use social networks keenly and often in job-related context as well. Magazine reading is at an average, but they have a wide- ranging reading interest. They put a special focus on technologically related topics.

- **Type 3: Digitally-Organised Pragmatist**
  (Total share: 4%, 2.68 million, average age: 37 years, porportion of men: 60%)
  This is the type with the highest income. He is searching for ways to get a quick overview and time- saving support in his perfectly timed everyday life. He knows how to take advantage of digital and mobile media in order to achieve this goal. Smartphones and tablet computer belong to his standard equipment and using apps is part of his daily routine. His usage of print media is above average. He has a wide range of interest with a focus on technologically related topics.

- **Type 4: Mobile Networker**
  (Total share: 12%, 8.20 million, average age: 28 years, proportion of women: 50%)
  They are the youngest type and often still in training. Media provide them first and foremost with entertainment, but also with relaxation and escape and serve as a source of information. Social network is their magic word and there is hardly one of them who does not have a facebook account. They are well-equipped with smartphones, but often do not have enough money to buy tablet computers. They use magazines and TV very selectively.

Media User Typology Outline II

- **Type 5: Entertainment-Oriented Idler**
  (total share: 5%, 3.08 million, average age: 36 years, proportion of women: 56%)
  They seek relaxation and like to be entertained. Their computers are indispensable for this purpose. You will not find a tablet computer in their households (yet). They prefer information to be brief and concise. They appreciate the widely used social networks for facilitating swift communication and being an uncomplicated way of getting to know new people.

- **Type 6: Entertainment-Oriented Offliner**
  (total share: 25%, 17.01 million, average age: 61 years, proportion of women : 81%)
  This is the oldest, mainly female type with low education and low income who favours primarily magazines and TV, above all seeking relaxation and entertainment. Online and mobile activities do not play a significant role. There is great interest in celebrities, stories about individual fates and needlework.

- **Type 7: Family-Oriented Selective User**
  (total share: 18%, 12.328 million, average age: 46 years, proportion of women: 60%)
  People of this type display a behaviour of media usage below average with the exception of listening to the radio. They are reserved towards the internet. They are especially interested in reading about creative design and family topics.

- **Type 8: Uninterested Media Grouch**
  (total share : 7%, 5.09 million, average age: 48 years, proportion of men: 66%)
  The poorly educated and low-income media grouch is neither fond of classical nor digital media. Only an interesting soccer match will draw him towards the TV screen.

The media compass is used to assess the media affinity of any kind of target groups.

It shows in which media categories or sub-categories certain target groups concentrate and helps to effectively support strategic planning.

Target group definition	Target group selection	Calculation	Comparison	Interpretation
Definition of an arbitrary target group	Selection of the suitable or desired target group	Program calculates compass key figure of the media in this target group	Comparison of compass key figures of the media or of target group with the compass key figures of the basic target group	Interpretation: Index > 100: target group affine to medium; Index < 100: target group less affine. Coloured areas show the affinity at one glance

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Analysis Programs: Media Planning Programs

mds – Mediaplanungs-Dialog-System

- A media planning program for PCs developed by Axel Springer.
- The user guidance is based on the planning process and guarantees that an effective and fast tool is available to marketing and media experts.
- Contact:
  Axel Springer SE – Market research
  Telephone: (040) 347 22507
  Mail: mds-service@axelspringer.de

mediMACH

- Universal analysis and planning program for evaluation of market/media analyses
- Network-compatible version of Windows for custom-made survey evaluation and more
- Intuitive operation with Drag & Drop
- Contact :
  COMsulting
  Gerhard Faehling GmbH
  Telephone: (04503) 35350
  Mail: info@medimach.com

m CLOUD

- A web-based Platform-independent media planning evaluation software (Print, Radio, TV, Online, Cinema, Poster) to analysis market data and a monitoring tool for content analyses and resonance data
- Contact :
  IMMEDIATE Software für
  Marketing und Media GmbH
  Telephone: (0421) 20 71 500
  Mail: info@immediate.de

Next Steps: Continuous Up-date of Coverages

November 2015	February 2016	September 2016
merge on the basis of ma 2015 Intermedia PLuS (posters, TV) and on the basis of ma 2015 Radio II	new adjustment to ma 2016 Presse I (magazines, daily newspapers) and to ma 2015 Internet 10 (online offers)	b4p 2016

! b4p is intermedia plus markets!

Thank You!

Gesellschaft für integrierte
Kommunikationsforschung mbH & Co. KG

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