best for planning

Outline
Agenda

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ONE FOR ALL
The beginning: cooperation, not confrontation

5 media groups
1 common goal

axel springer
FUNKE
GRUPPE
Hubert Burda Media
ONE FOR ALL

ALL People – ALL Media – ALL Markets

**b4p 2015**

Over **80 million** collected information

Over **30,000** surveyed consumers

Approx. **2,400** brands

Approx. **110** brand sectors

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
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
<table>
<thead>
<tr>
<th>Methodology</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Universe</td>
<td>German-speaking resident population over 14 years of age in Germany (69.24 million)</td>
</tr>
<tr>
<td>Sampling</td>
<td>ADM sampling, random address selection</td>
</tr>
<tr>
<td>Number of cases</td>
<td>30,177 cases</td>
</tr>
<tr>
<td>Institutes</td>
<td>GfK Media &amp; Communication Research, IFAK, Ipsos, MARPLAN</td>
</tr>
<tr>
<td>Survey Period</td>
<td>September 2013 until April 2014 September 2014 until April 2015</td>
</tr>
<tr>
<td>Field model</td>
<td>Approx. 15,000 cases/year rolling system: summarization of two years outcomes into one edition</td>
</tr>
<tr>
<td>Questionnaire</td>
<td>CAPI (Computer Assisted Personal Interview), Media CASI (Computer Assisted Self Interview), markets in written form(self-completion questionnaire), technical measurement(parallel wave)</td>
</tr>
</tbody>
</table>
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.
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.
Interlink data in a meaningful way
### 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/grandchildren in household
- Net household income
- Real disposable income

#### Mobility
- Mobility
- Use of transportation
- Public transport
- Commuting
People: Demographic Target Groups

- Social Grades (ABCD)
- Socio-Economic Allocation
- Phases/Cycles of Life
- Personicx™ Typology
- Biographical Stages
- microm Typology
b4p offers a glimpse behind the demographic scenes

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
- ...

Needs

Interests

Motivations
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

Brand Loyalty

Smart Shopper

People: Market-Based Target Group Models
**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.
Markets: Outline

**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
- ...

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*page 19*
Which sources of information do you generally use when you want information about products, brands or services before making a purchase?

- 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
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)
**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)
interlink data in a meaningful way
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.
Cross-media Brand Coverages

** 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)

- WELT (Print)/welt.de
- WELT (Print)/WELT Mobile
- welt.de/WELT Mobile
- WELT (Print)/welt.de/WELT Mobile

in Mio.
0.28
0.21
0.36
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
Evaluate overlaps of media channels and total coverage with b4p

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

Overlapping (on weekly basis)

- 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

Evaluate overlaps of media channels and total coverage with b4p

Overlapping
(on weekly basis)

- Focus (Print)/focus.de
- Focus (Print)/Focus Mobile
- focus.de/Focus Mobile
- Focus (Print)/focus.de/Focus Mobile

Focus Print: reader per issue Focus
focus.de: Online usage (Big Screen)
Focus Mobile: Mobile usage focus.de/MEW as well as via Apps
Evaluate overlaps of media channels and total coverage with b4p

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
Evaluate overlaps of media channels and total coverage with b4p

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

### 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
- ...

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**Thematic interests Magazines (28)**
- NEW: Garden and Plants
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**Activities on Internet (15)**
- Sending emails
- Instant Messaging
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**qualitative media insights**

**media use statements**
- 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
- ...

**advertisements in media genres**
Advertisements in ...(PZ, TZ, TV, etc.)...
- ...are informative
- ...encourage to buy
- ...are authentic
- ...are entertaining
- ...

**internet/social media statements**
- NEW: I have often reported on the internet about my experience with products and services and written comments for valuation websites or similar websites
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- ...

**thematic interests magazines**
- NEW: Garden and Plants
- Food, Cooking, Recipes
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**popular tv genres**
- Reality-Shows
- News
- Crime
- Car Racing
- Daily Soaps
- ...

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

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**Seite 36**  
**b4p Outline | 14.03.2016**
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?

- Regularly (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

- Classical Information Elite
  - 24% (16.44 mil.)
  - Average age: 54 years
  - Proportion of men: 77%
  - Motto: Knowledge is power

- Continuous Information-Scanner
  - 6% (4.42 mil.)
  - Average age: 35 years
  - Proportion of men: 63%
  - Motto: What’s up!

- Family-Oriented Selective User
  - 18% (12.32 mil.)
  - Average age: 46 years
  - Proportion of women: 60%
  - Motto: Family comes first

- Digitally-Organised Pragmatist
  - 4% (2.68 mil.)
  - Average age: 37 years
  - Proportion of men: 60%
  - Motto: Only 148 Emails left to check

- Entertainment-Oriented Off-Liner
  - 25% (17.01 mil.)
  - Average age: 61 years
  - Proportion of women: 81%
  - Motto: Let’s see how Queen Slivia is doing

- Uninterested Media Grouch
  - 7% (5.09 mil.)
  - Average age: 48 years
  - Proportion of men: 66%
  - Motto: I couldn’t care less

- Mobile Networker
  - 12% (8.20 mil.)
  - Average age: 28 years
  - Proportion of women: 50%
  - Motto: I like Facebook

- Entertainment-Oriented Idler
  - 5% (3.08 mil.)
  - Average age: 36 years
  - Proportion of women: 56%
  - Motto: Don’t bore me
Media User Typology

- Classical Information Elite (18%)
- Digitally-Organised Pragmatist (25%)
- Entertainment-Oriented Idler (6%)
- Entertainment-Oriented Offliner (12%)
- Family-Oriented Selective User (5%)
- Continuous Information-Scanner (24%)
- Mobile Networker (4%)
- Uninterested Media Grouch (7%)
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, proportion 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.
Type 5: Entertainment-Oriented Idler  
(tot al 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  
(tot al 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  
(tot al 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  
(tot al 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.

- **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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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.

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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:
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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

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Next Steps: Continuous Up-date of Coverages

November 2015
- merge on the basis of ma 2015 Intermedia PLuS (posters, TV) and on the basis of ma 2015 Radio II

February 2016
- new adjustment to ma 2016 Presse I (magazines, daily newspapers) and to ma 2015 Internet 10 (online offers)

September 2016
- b4p 2016

b4p is intermedia plus markets!
Thank You!

Gesellschaft für integrierte Kommunikationsforschung mbH & Co. KG
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