+ 2016
Interlink data in
a meaningful way

b4p best for planning.

best for planning
Basic Presentation

Agenda

1 Basics

2 Methodology

3 People

4 Markets

5 Media

6 Future Prospects, Evaluation and Contact

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1

BASICS

Information is the Key!

Facts are essential for complex decision making. best for planning has them.

Good reasons for best for planning

MEDIA CONVERGENCE

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.

30,190 surveyed consumers

German-speaking resident population over 14 years of age in Germany
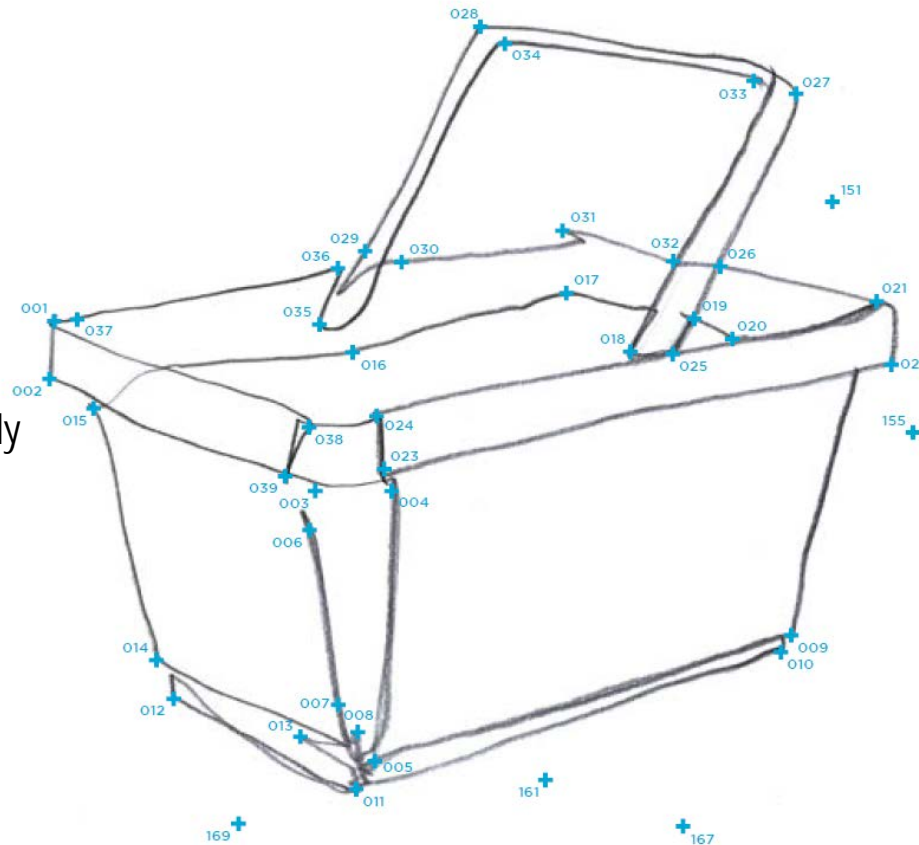
Representative for 69.56 million people

b4p best for planning.

Good reasons for best for planning

MARKETS

b4p explains markets and reveals market trends.

Apart from covering all advertising-relevant markets, b4p also enables detailed analyses in a number of sectors due to its tremendously high number of cases.

2,400 brands

120 market sectors

15 advisor sections

41 interest in product information

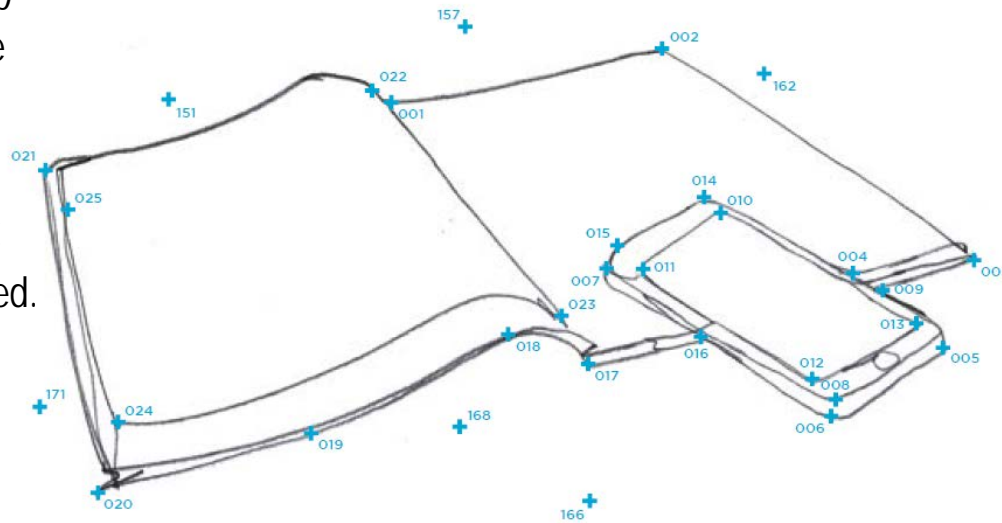57 brand relevance sections

10 sector typologies

b4p best for planning.

Good reasons for best for planning

MEDIA

b4p makes media transparent.

For the first time in the history of market media surveys, the use of online and mobile websites was not only determined by interviews but was also technically measured.

177 magazine titles

66 booking units of daily newspapers

784 websites

316 mobile offers

181 apps

11 TV stations

radio

poster

cinema

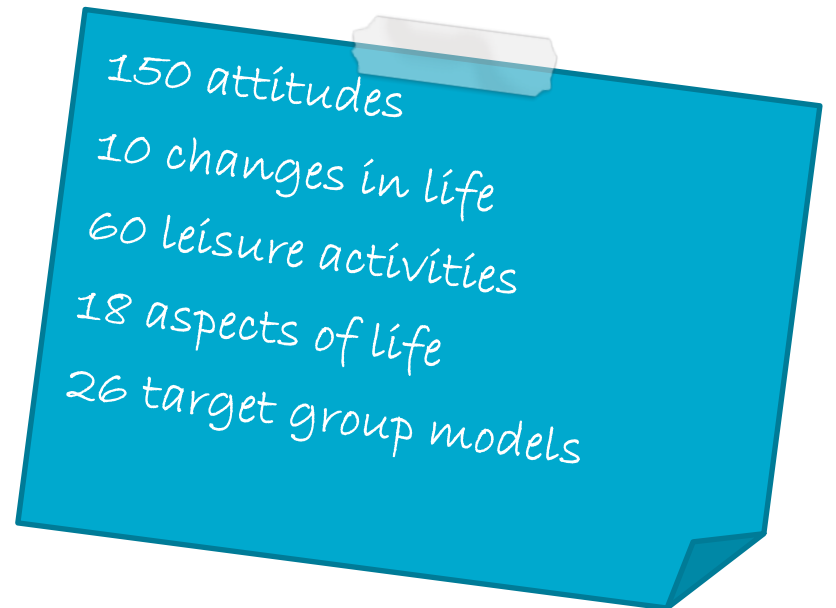Cross media brand reach & combinations
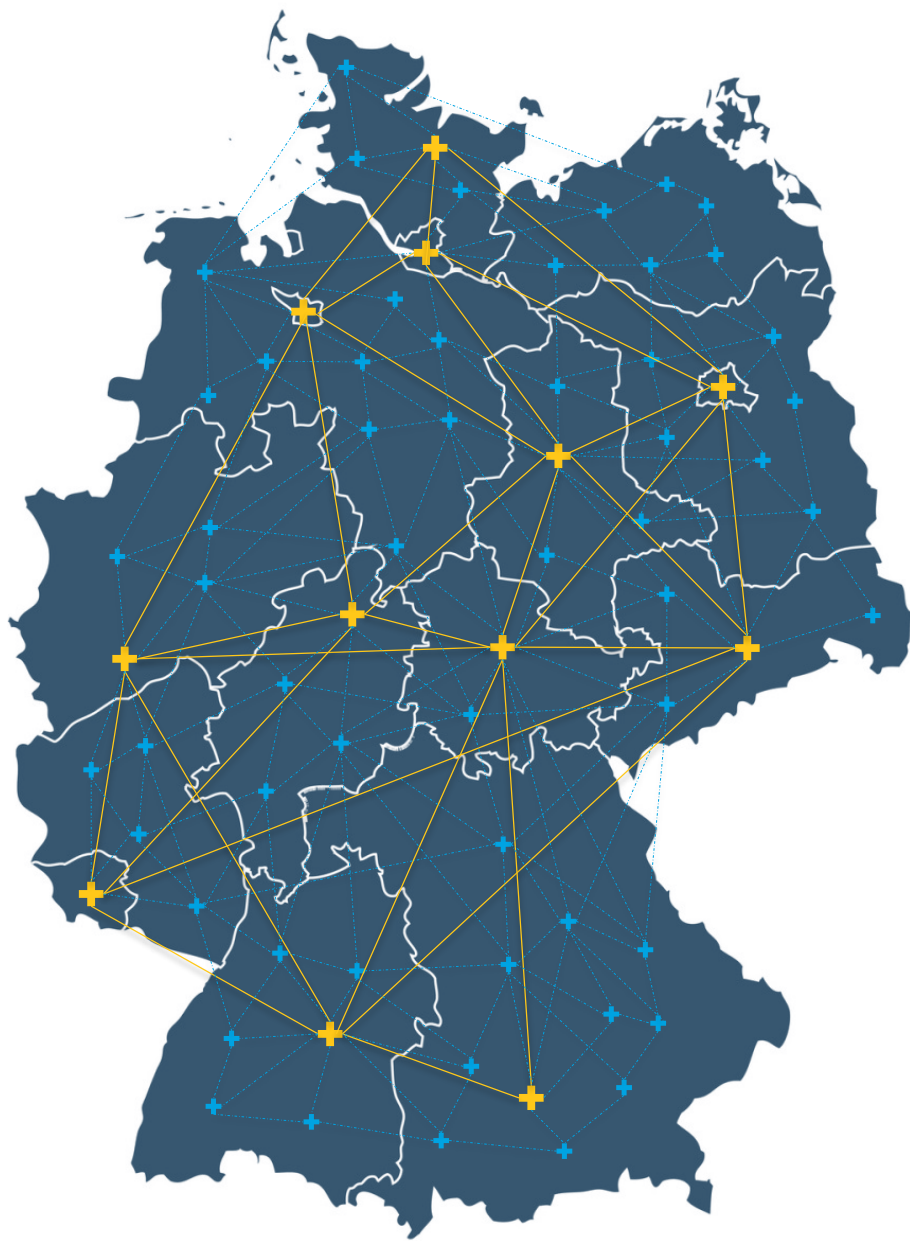
PEOPLE

b4p converts people into target groups.

The survey pinpoints everything that used to disappear behind hard numbers of demographic data: interests, motivations, attitudes and needs.
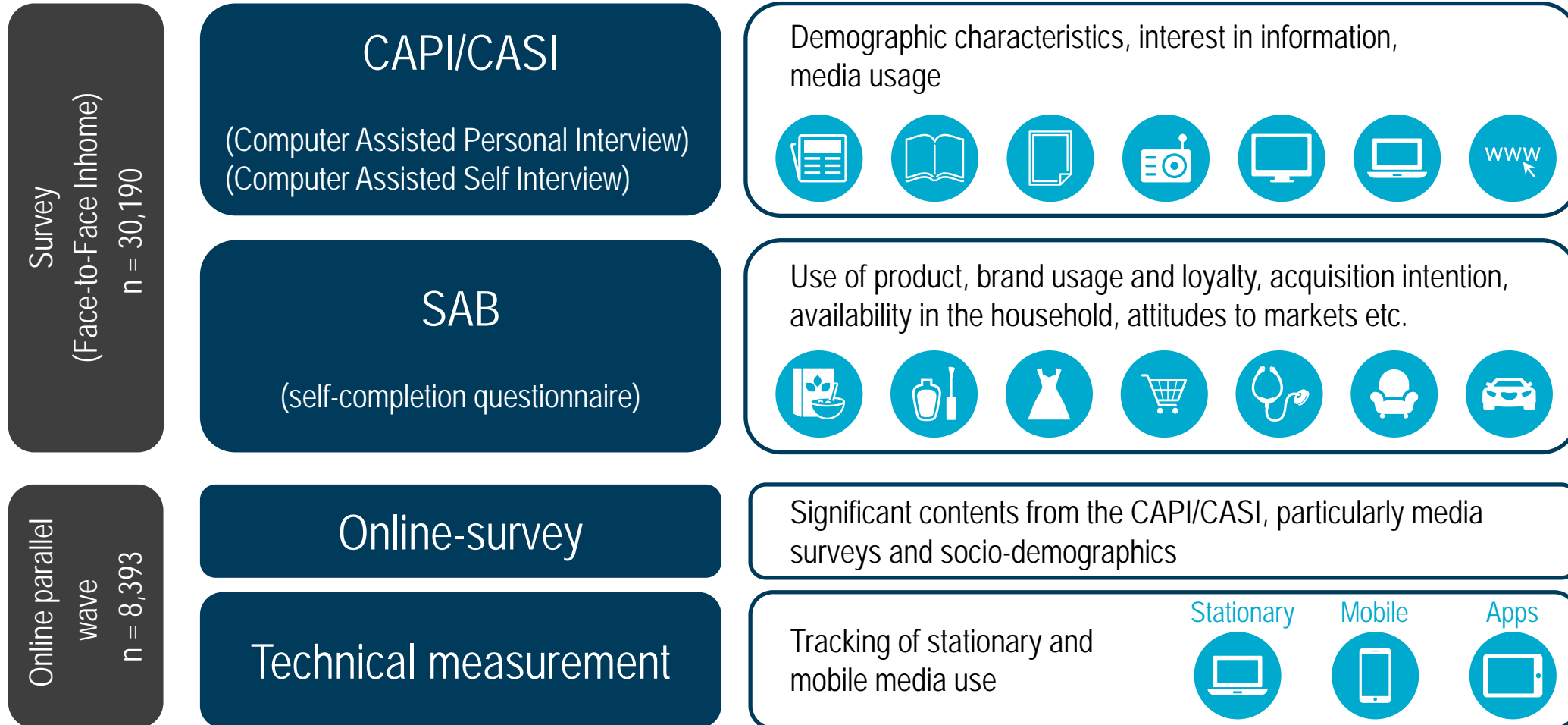

150 attitudes

10 changes in life

60 leisure activities

18 aspects of life

26 target group models

b4p best for planning.
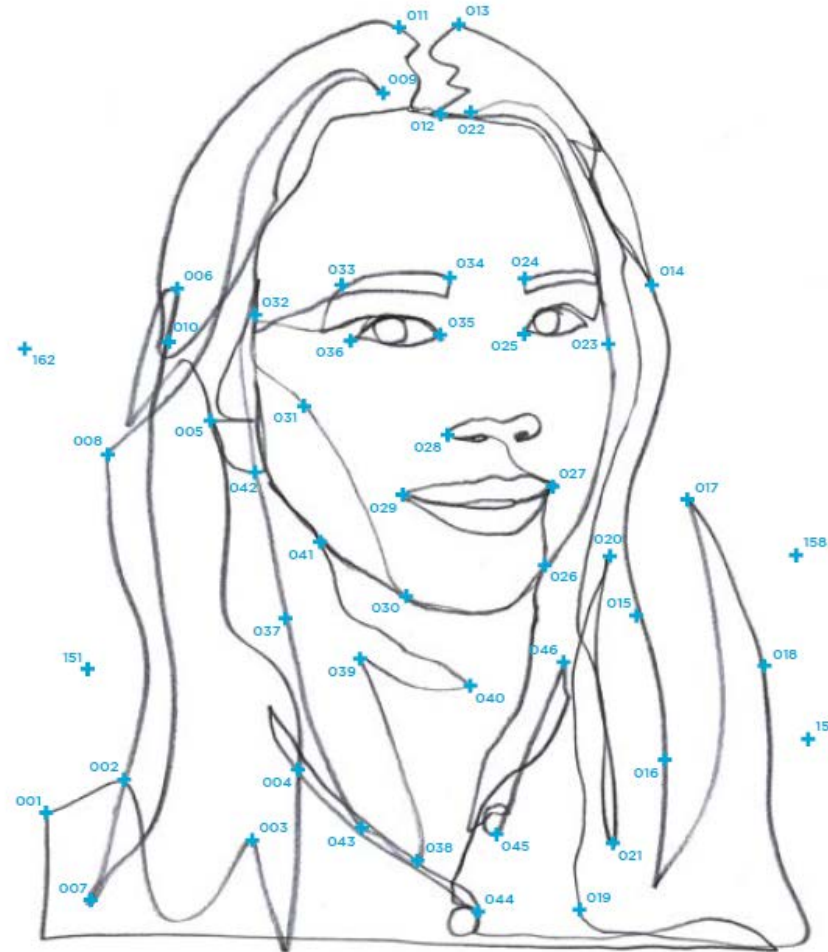
2

METHODOLOGY

Multi-Source Approach

b4p provides outstanding quality

Survey (Face-to-Face Inhome) n = 30,190

CAPI/CASI

(Computer Assisted Personal Interview)
(Computer Assisted Self Interview)

Demographic characteristics, interest in information, media usage

SAB

(self-completion questionnaire)

Use of product, brand usage and loyalty, acquisition intention, availability in the household, attitudes to markets etc.

Online parallel wave n = 8,393

Online-survey

Significant contents from the CAPI/CASI, particularly media surveys and socio-demographics

Technical measurement

Tracking of stationary and mobile media use

Stationary   Mobile   Apps

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Methodology

First-class quality standards

+ SAB & CAPI/CASI

Universe:	German-speaking resident population over 14 years of age in Germany (69.56 Mio.)
Sampling:	ADM sampling, random address selection
Number of cases:	30,190 cases
Institutes:	GfK Media & Communication Research, IFAK, Ipsos
Survey Period:	September 2014 until April 2015 September 2015 until April 2016
Field model:	approx. 15,000 cases/year Rolling system: consolidation of two years outcomes into one edition

+ Online parallel wave

Universe:	German-speaking resident population over 14 years of age in Germany (69.56 Mio.)
Sampling:	Stationary use: 8,393 cases Mobile use of websites & apps: 4,023 cases
Institutes:	GfK SE
Survey Period:	January 2015 until March 2015 January 2016 until March 2016
Panel:	GfK Crossmedia Link

b4p best for planning.
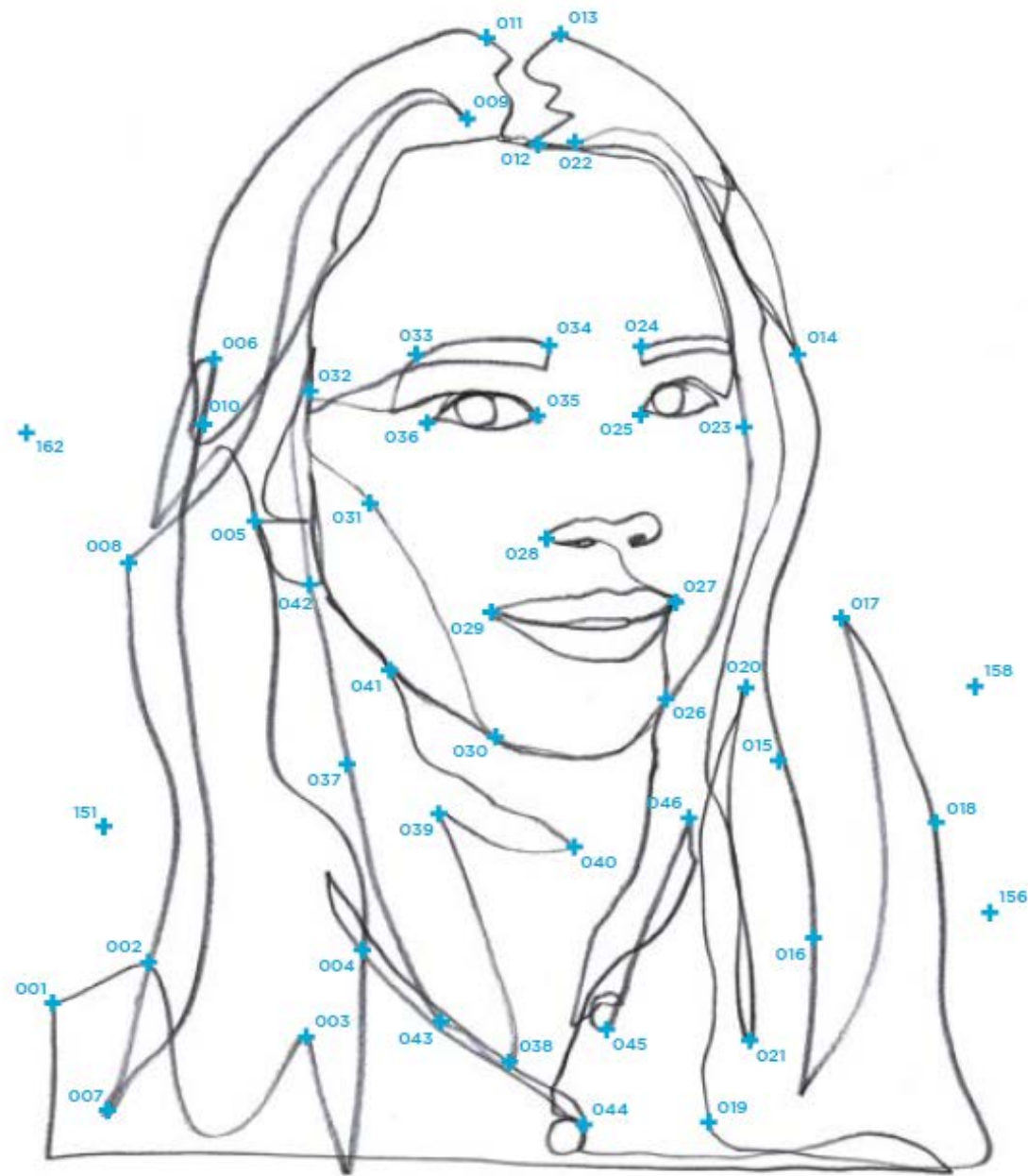
3

PEOPLE

People

Demographics

Interviewee

- Age
- Sex
- Nationality
- Religious affliation
- Marital status
- Body mass index, height, weight

Household

- Household size
- Main income earner
- Household management
- Children/grand children in household
- Family members in need of care
- Net household income
- Real disposable income

Residential area

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

Life situation

- Stages of life
- Life cycles

Occupation

- School-leaving qualification/ occupational training
- Occupation
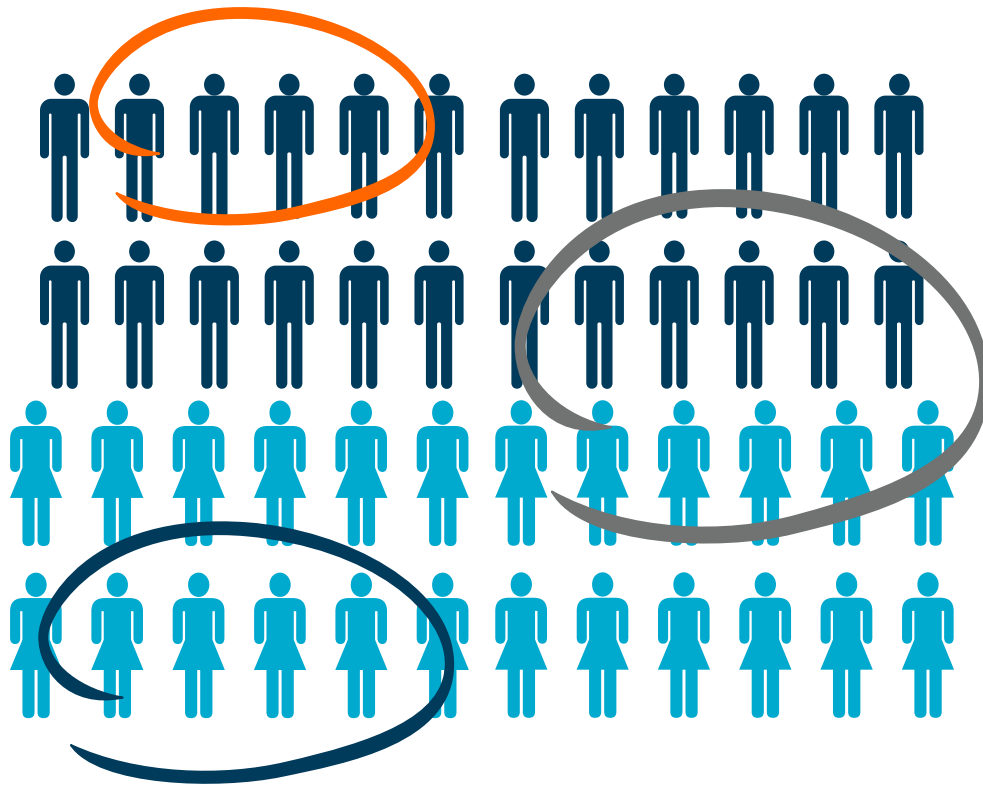- Professional status
- Personal income
- Commercial sector

Mobility

- Away from home
- Use of transportation
- Public transport
- Commuting

b4p facilitates various target group and life style analyses

Social Grades (ABCD)

Socio-Economic Allocation

Phases/Cycles of Life

Personicx™ Typology

microm Typology

Interests, Needs and Motivations Change

b4p takes up social developments and current trends

New in b4p 2016

+

- Nutrition types (et al. vegetarian, flexitarian, vegan)
- Additional leisure activities: doing sports, baking, cooking
- Use/Intention of use of: wearables, connected cars, smart home, online supermarkets, music and video streaming services
- Booking through online accommodation operators
- Statement on use of scents
- Statements on the topic mobile communications
- Statements on financial topics
- Statements on harmony of body and soul
- Interest in topics in magazines for puzzles, competitions, horoscopes
- Interest in information and brand price/awareness for dental and oral care, erotic products/erotic aids

… and much more

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Psychographic Characteristics

What's behind the demographics?

Statements on Change

I am about to change jobs

I will become self-employed

I will marry

I will emigrate

…

10 Items

Leisure

Visiting stadium association football matches

Pets

Cycling, Mountain biking

Reading magazines

…

60 Items

Aspects of life

Large circles of friends

Personal success

Sound environment

Individuality

Fun and friends

…

18 Items

Spheres of Life

Luxury makes life better

I try to stay fit by doing sports regulary
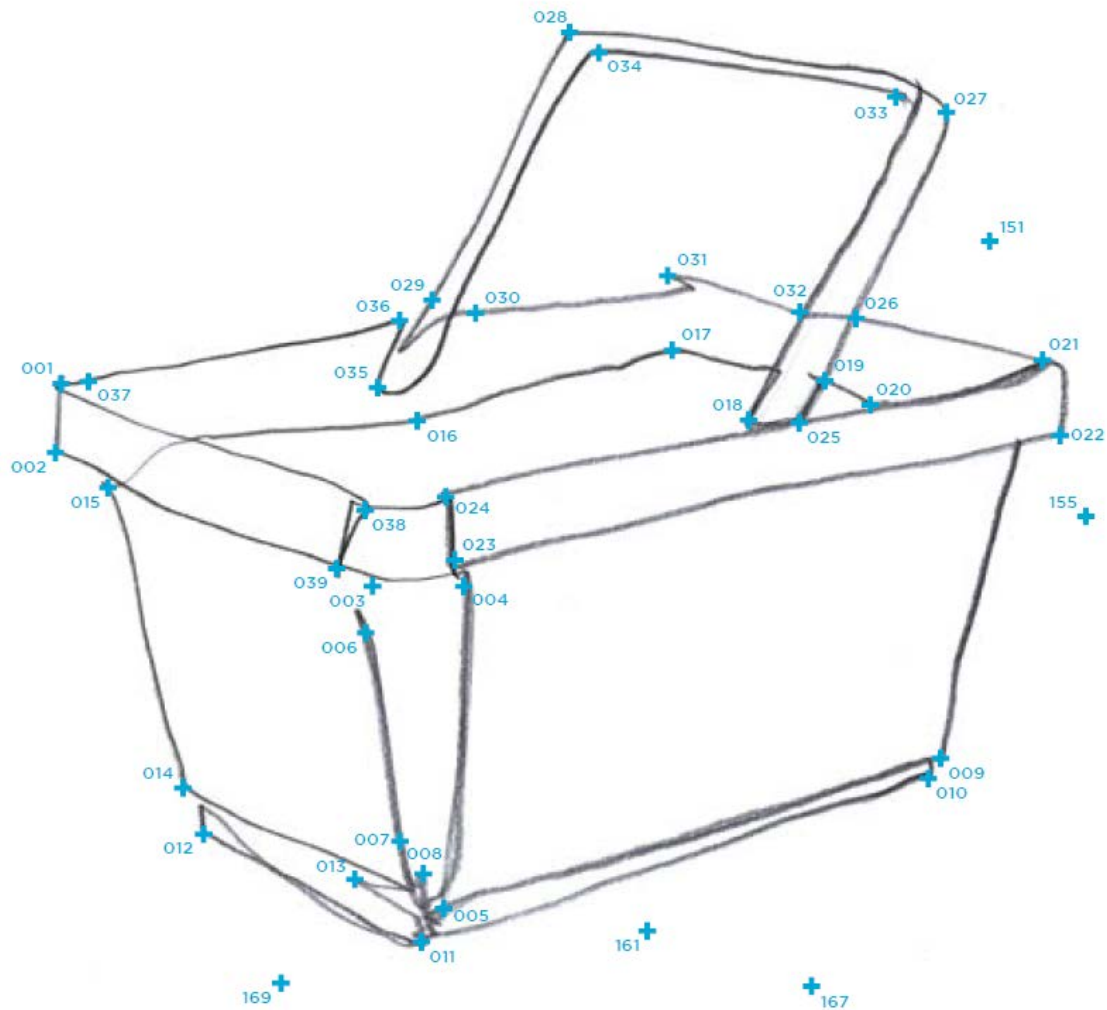
I gladly take on responsibility

…

40 Items

b4p reveals what's behind the demographics

+ **SIGMA-Milieus®**

+ **Sinus-Milieus®**

+ **Limbic®-Types**

+ **Personality Factors**

+ **Interest Horizons**

+ **The Lohas** (Lifestyle of Health and Sustainability)

+ **The New Alphas**

4
MARKETS

Markets and Market Trends

b4p represents all markets relevant for advertising…

Consumer Goods

Food Cosmetics Health

→ Frequency of Usage
→ Purchase
→ Usage of brands

Services

Finance and Insurance Retailing Travelling

→ Available/concluded in household
→ Purchase intention
→ Provider preference
→ Place of purchase

Durable Goods

Home and Living Fashion Consumer Electronics Car and Mobility

→ Available in household/ personal ownership
→ Purchase intention
→ Brand ownership

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Comprehensive Features

… and uncovers consumer behaviour in Germany.

Purchasing Decisions

Tablet computer

Pay TV subscription

Second car in the household

Planning/booking holiday trips

Financial investment

…

21 Items

Statements

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

…

99 Items

Interest in Product Information

Decorative cosmetics

Bags, travel bags, leather goods

Apps/applications for mobile phones

Furniture and furnishing

Short trips

…

41 Items

Role as Advisor

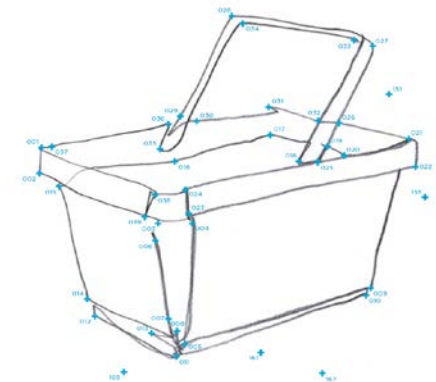Consumer electronics

Fashion

Cosmetics

Food

…

15 Items

Brand/Price Awareness

Non-alcoholic beverages

Confectionery, snack items

Perfumes/scents/eau de toilette/aftershave

Mobile phones, smartphones

Household appliances …

**57 Items**

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Representation of Brands

Important basis for many analyses

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

Media

Markets

People

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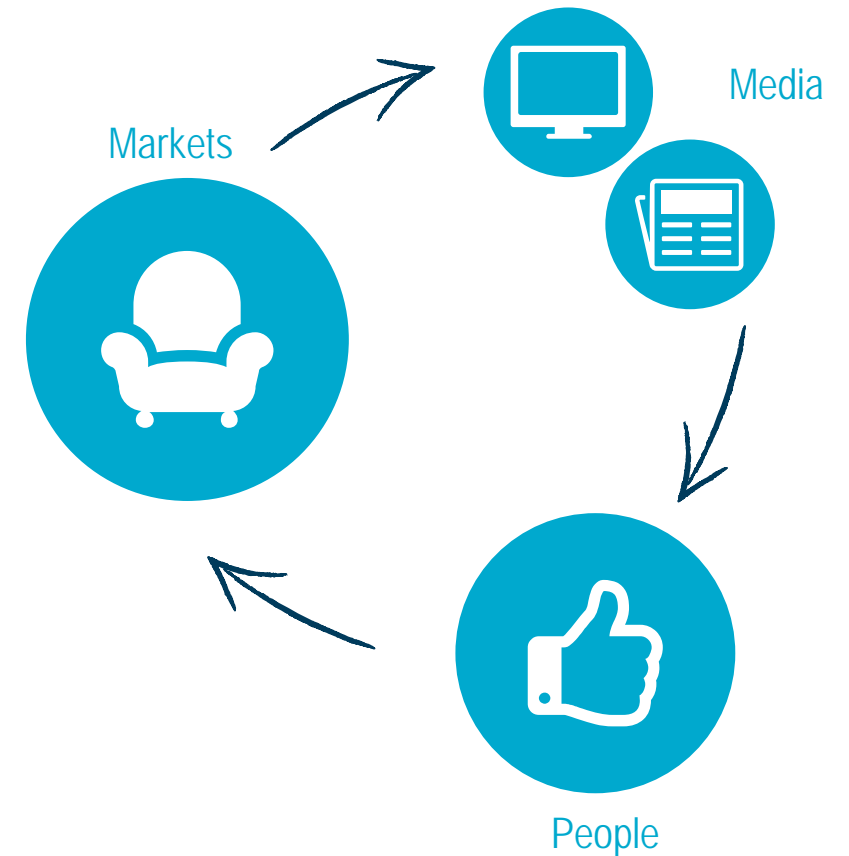
Markets and Brands

Annual updates of brands

New in b4p 2016

+ New brands in…

Cola drinks

Energy drinks, sport/fitness drinks

Beer mix drinks

Non-alkoholic beer/light beer

Coffee pads/capsules

Mobile providers

Cameras/photo equipment

Fashion/clothing

Jewellery

Fast-food restaurants

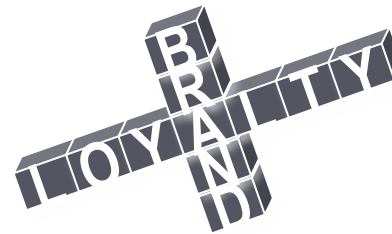Online travel operators/accomodation operators

… and many more

Market-Based Target Group Models

Who is the consumer? b4p provides answers.

+ Brand Orientation

+ Brand Loyalty

+ Gambling

+ Smart Shopper

+ Sector Typologies

10 Typos

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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 in total (loyalty in total)
- Average number of brands used by 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 Smart Shopper

Hybrid consumers who attach importance to the brand as well as to the price:
„I attach importance to the price as well as the brand"

No bargain hunters (looking for offers in the lowest price segment)

Compilation

Compilation based on 57 market related queries about 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 57 instances)
- **Top 20:** upper 20 per cent of this scale (affirmation in at least 30 of 57 instances)
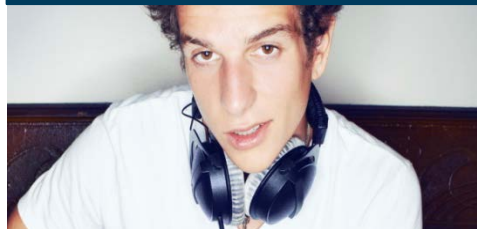
Sector Typologies
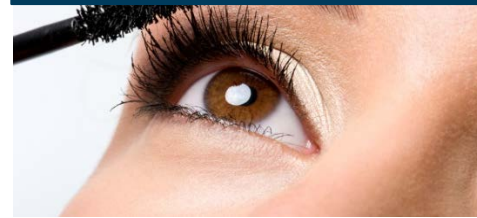
Finance

Health

Living

Travelling

Fashion Women

Fashion Men

Beauty Woman
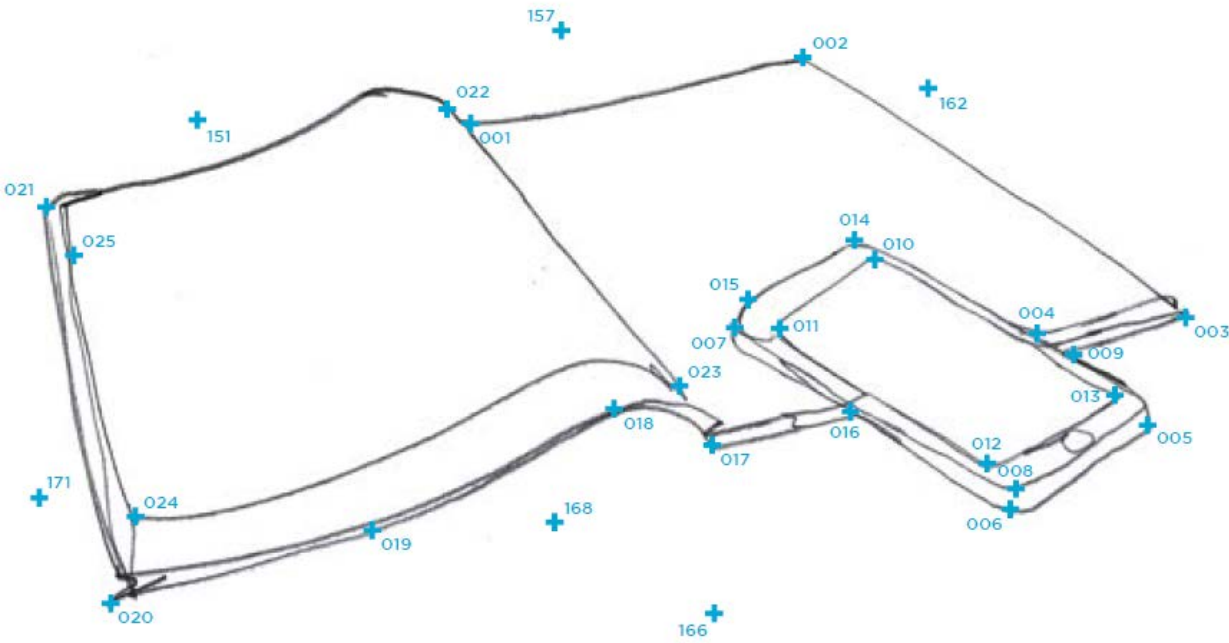
Beauty Men

Food

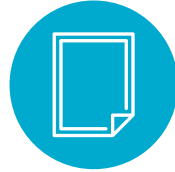**Car & Mobility**

5
MEDIA

Media in b4p 2016

177 Magazines, Reader circle

66 Booking units of daily newspapers

Posters

784 Websites, 499 Booking units
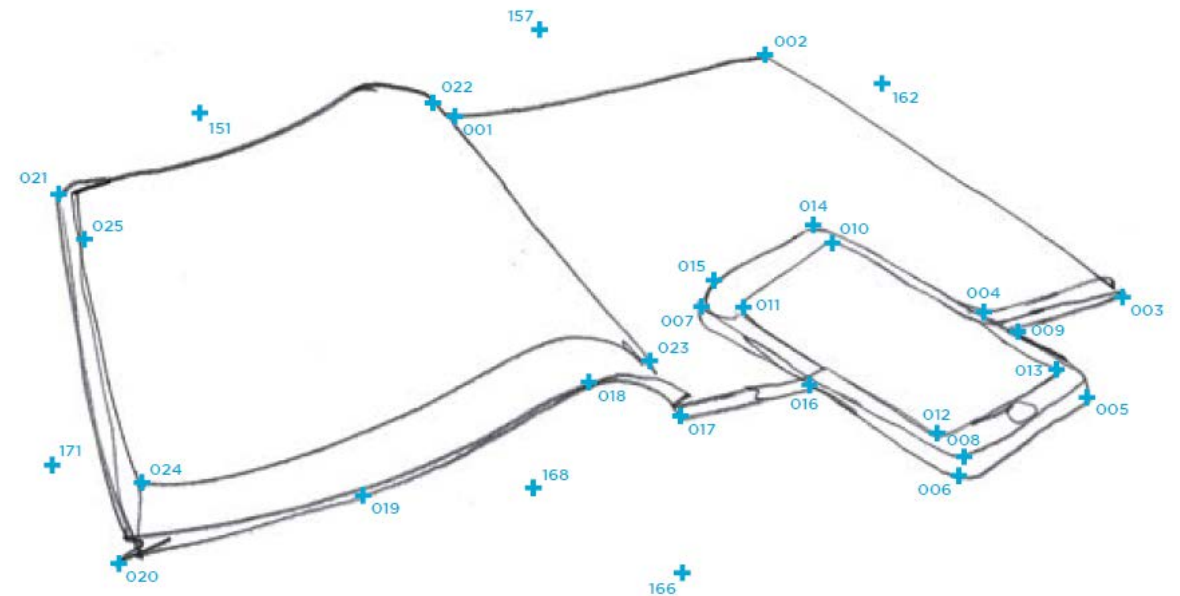
316 Mobile Sites/ MEWs

181 Apps

Cinema

Radio

11 TV stations

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Representation Requirements

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

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Reach Adjustments

Reach is adjusted to established values wherever possible

„ma-World"

Adjustment to ma

- ✚ Print
- ✚ TV
- ✚ Radio
- ✚ Posters
- ✚ Websites included in ma Internet
- ✚ Cinema

Not „ma-World"

Adjustment to AWA

- ✚ Free titles, Corporate Publishing
- ✚ Title which are published less often than monthly

No Adjustment

- ✚ Websites (without representation in ma internet)
- ✚ Mobile use of Smartphone, MEWs
- ✚ Apps

! Reach adjustments are up-dated regulary

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Representation of cross media brand reach

All published components of media brands, as far as they are represented in the survey, are merged into a „cross media brand reach"

Requirements for the evaluation:

➢ Print coverage + additional media type (Online, Mobile, App)
➢ Perceivable brand image from consumer's point of view

Performance data:

➢ User per day for daily newspapers
➢ User per week for daily newspapers and weekly magazines
➢ User per month for all magazines published at least once a month

Print	Mobile
Media brand	
Online	Apps

Defined time horizon:

Brand reach is presented in b4p for a defined time horizon (daily, weekly, monthly). In this process, the reach of included brands are converted into the respective time horizon. The standard for the shortest unit of time is the publication frequency of the print media. For print media, the reach of all items which are allocatable to the respective period apply.
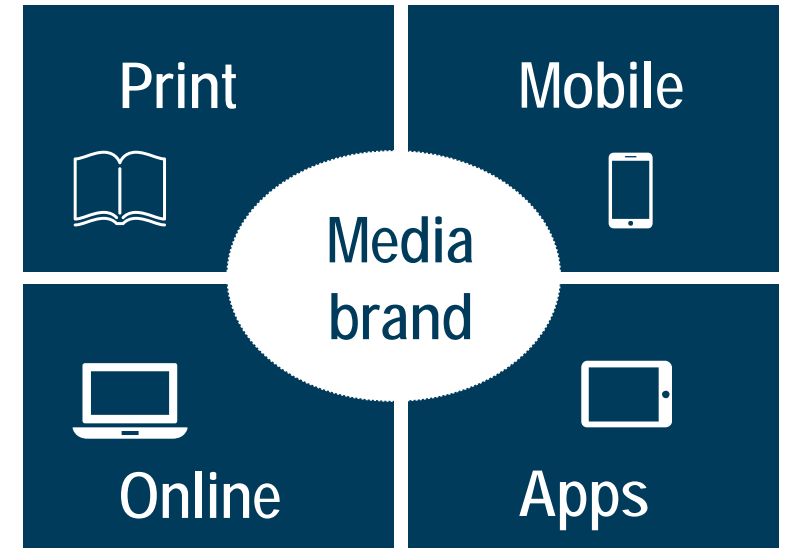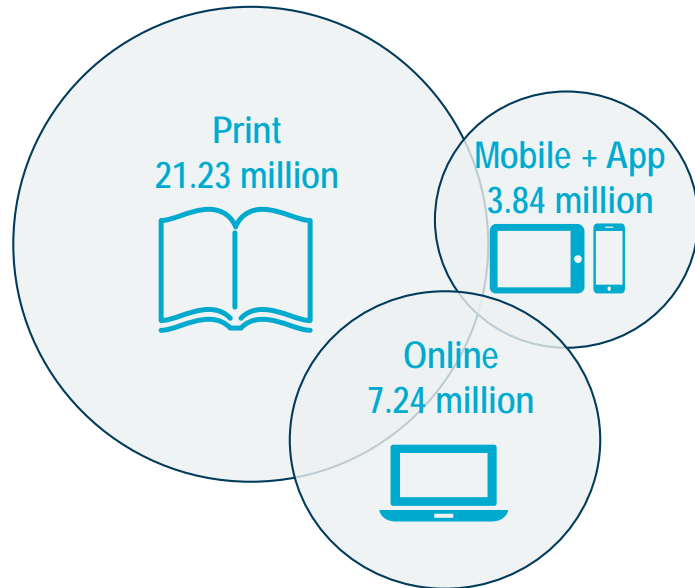
Net reach BILD: 27.88 million
(time horizon: week)

Overlapping
(on weekly basis)

in Mio.

- BILD DEUTSCHLAND GESAMT (Print) / BILD.de (Internet) 2.19
- BILD DEUTSCHLAND GESAMT (Print) / BILD (Mobile + App) 1.55
- BILD.de (Internet) / BILD (Mobile + App) 1.23
- BILD DEUTSCHLAND GESAMT (Print) /
  BILD.de (Internet) / BILD (Mobile + App) 0.53

Print
21.23 million

Mobile + App
3.84 million

Online
7.24 million

BILD Print: reader per issue BILD DEUTSCHLAND GESAMT (6x) + BILD am SONNTAG
BILD.de (Internet): stationary online usage (Big Screen)
BILD (Mobile+App): mobile usage bild.de/MEW as well as via apps

Evaluate Overlaps of Media Channels and Total Reach with b4p

Net reach stern: 9.51 million
(time horizon: week)
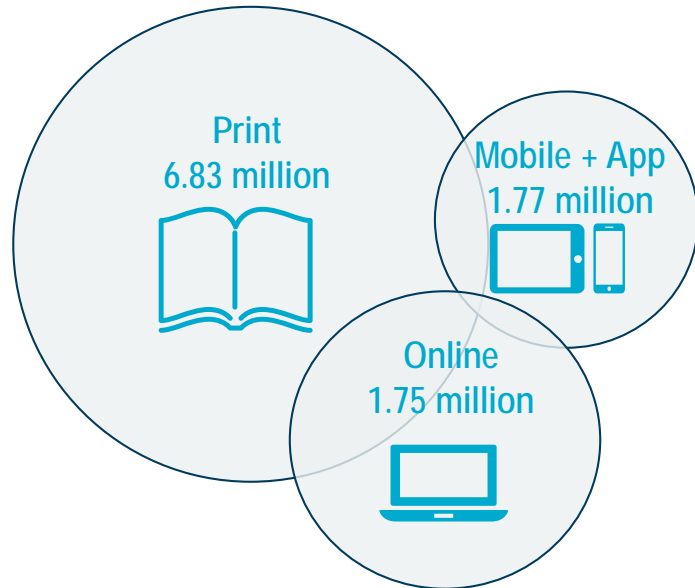
Overlapping
(on weekly basis)

	in Mio.
• stern (Print) / stern.de (Internet)	0.29
• stern (Print) / STERN (Mobile + App)	0.33
• stern.de (Internet) / STERN (Mobile + App)	0.28
• stern (Print) / stern.de (Internet) / STERN (Mobile + App)	0.06

Print
6.83 million

Mobile + App
1.77 million

Online
1.75 million

stern Print: reader per issue stern
stern.de: stationary online usage (Big Screen)
STERN (Mobile + App): mobile usage stern.de/MEW as well as via apps

Net reach Focus: 12.76 million
(time horizon: week)

Overlapping
(on weekly basis)

	in Mio.
• Focus (Print) / focus.de (Internet)	0.51
• Focus (Print) / Focus (Mobile + App)	0.39
• focus.de (Internet) / Focus (Mobile + App)	0.64
• Focus (Print) / focus.de (Internet) / Focus (Mobile + App)	0.08

Print 4.28 million

Mobile + App 3.68 million

Online 6.26 million

Focus Print: reader per issue Focus
focus.de: stationary online usage (Big Screen)
Focus (Mobile + App): mobile usage focus.de/MEW as well as via apps

Evaluate Overlaps of Media Channels and Total Reach with b4p
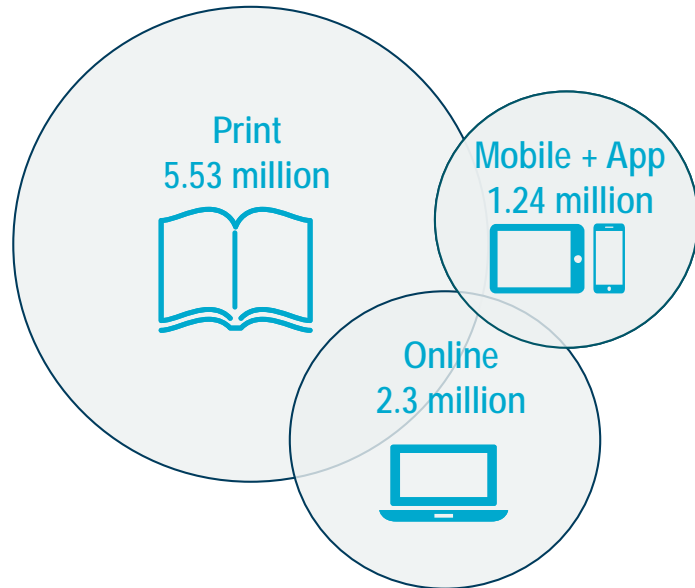
Net reach TV Movie: 8.15 million
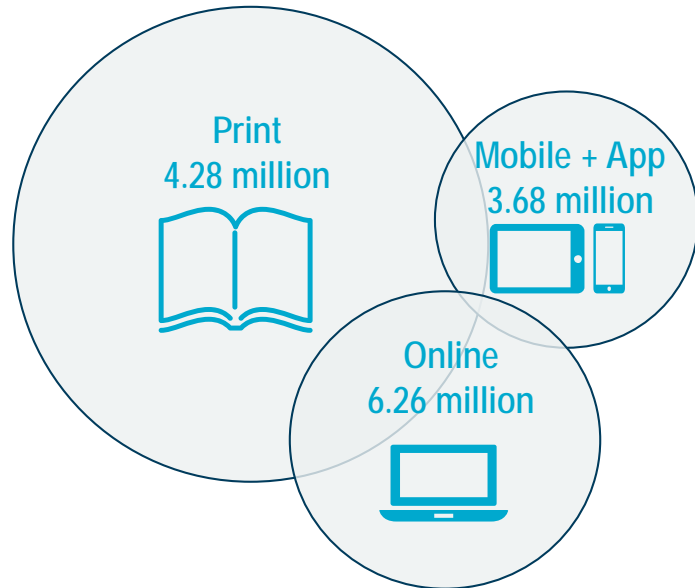(time horizon: month)

Overlapping
(on monthly basis)

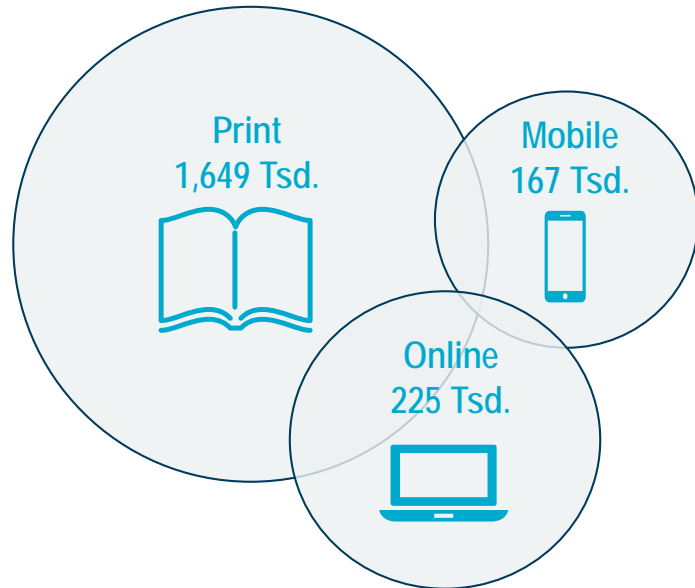|	in Mio.
• TV Movie (Print) / tvmovie.de (Internet)	0.43
• TV Movie (Print) / TV Movie (Mobile + App)	0.25
• tvmovie.de (Internet) / TV Movie (Mobile + App)	0.32
• TV Movie (Print) / tvmovie.de (Internet) / TV Movie (Mobile + App)	0.08

TV Movie Print: reader per issue TV Movie (2x)
tvmovie.de: stationary online usage (Big Screen)
TV Movie (Mobile + App): mobile usage tvmovie.de/MEW as well as via apps

Cross media combination Funke Medien NRW: 1,970 thousand
(time horizon: day)

Overlapping
(on daily basis)

Print 1,649 Tsd.

Mobile 167 Tsd.

Online 225 Tsd.

	in thsd
• Funke Medien NRW (Print) / derwesten.de (Internet)	38
• Funke Medien NRW (Print) / WAZ (Mobile)	27
• derwesten.de (Internet) / WAZ (Mobile)	11
• Funke Medien NRW (Print) / derwesten.de (Internet) / WAZ Mobile	4

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

Qualitative Media-Insights enough and to spare

Media use, advertisement, magazines und newspapers as well as…

Media in general

14 Items

Media use:

- 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

- I try to stay up-to-date by checking news media several times per day

…

Advertisement

11 Items

Attitudes towards advertisement:

Advertisements in…
(magazines, newspapers, TV etc.)

… are informative

… encourage to buy

… are authentic

… are entertaining…

6 Items

Statements on advertisement:

- I actually consider ads to be relatively useful

- Product samples, discount tickets or coupons have encouraged me to buy a product at least once   …

Magazines & Newspapers

29 Items

Thematic interests:

- Garden and plants

- Food, cooking, recipes

- Partnership

- Stars, celebrities …

9 Items

Reading venues:

- At home

- When in waiting rooms

- At the hairdresser´s

- At work/in the office   …

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Qualitative Media-Insights enough and to spare

…internet use, social media and second screen

TV

Popular TV Genres:

67 Items

- News
- Entertainment shows
- Quiz shows
- German crime series/thrillers
- Football
- Formila 1
- Reality shows
- Docu Soaps
- Daily Soaps
- Cooking shows

…

Internet & Social Media

Activities:

15 Items

- Accessing news and other information via media pages
- Sending and receiving emails
- Maintenance of business contacts   …

9 Items

Statements:

- I have often reported on the internet about my experience with products and services and written comments for valuation websites or similar websites
- I use social networks when I need to contact someone immediately …

Second Screen

Internet use while watching TV:

5 Items

- I mainly use my smartphone or tablet computer during commercials
- I use these devices to divert myself if the programme is temporarily boring.
- I usually use the smartphone or tablet computer when watching TV for things which have something to do with the current programme (e.g. look for background information, talk about current programme with friends)   …

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Media User Typology

Idler 5%

Information Elite 23%

Selective Userr 18%

Offliner 25%

Media Grouch 8%

Info-Scanner 6%

Pragmatist 4%

Networker 11%

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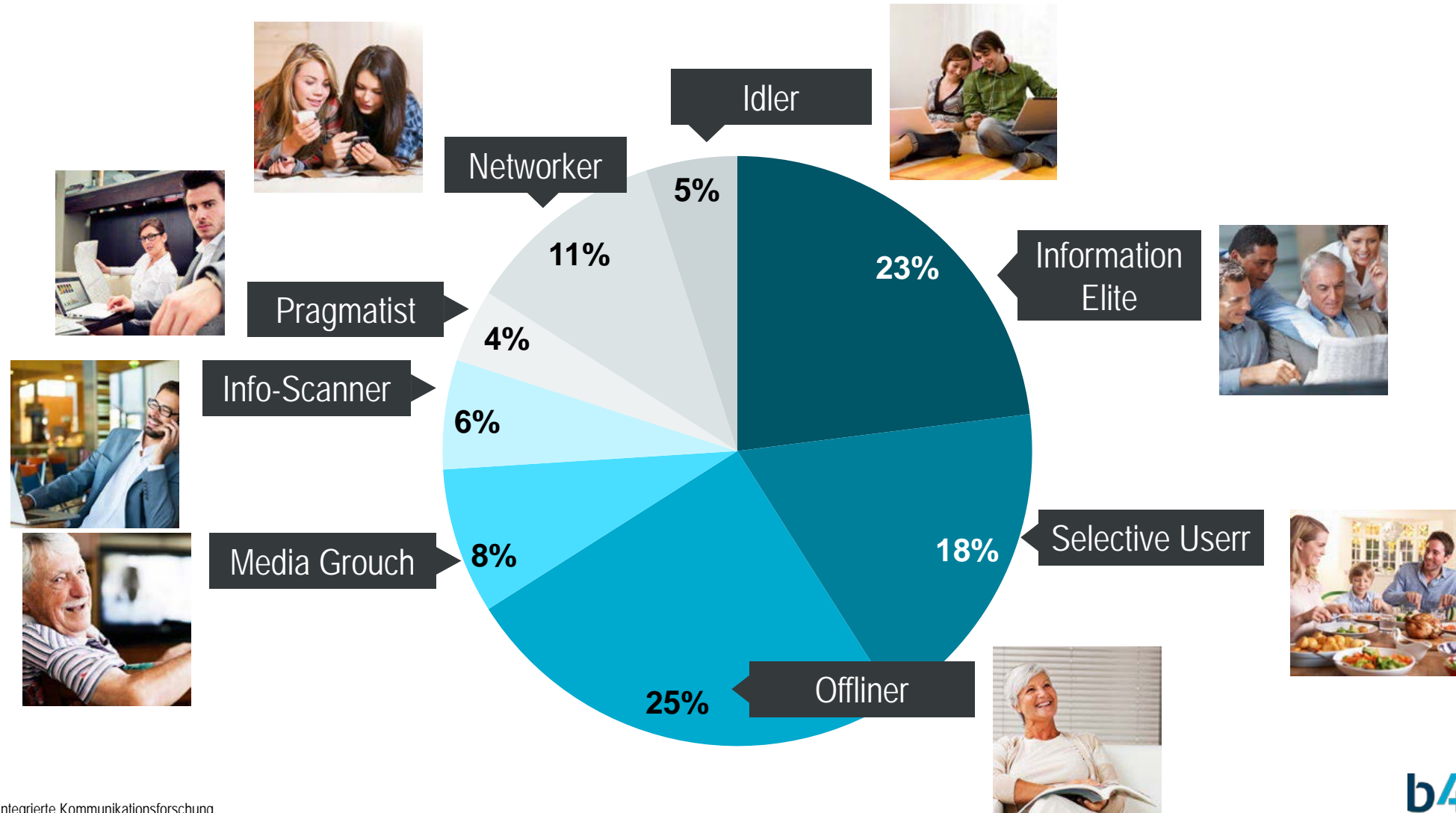
Media User Typology

Outline I

Type 1: Classical Information Elite (potential: 23%)

This 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 Info-Scanner (potential: 6%)

They have a high level of formal education and a clear 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 any time 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 wideranging reading interest. They put a special focus on technologically related topics.

Type 3: Digitally Organised Pragmatist (potential: 4%)

This is the type with the highest income and they are searching for ways to get a quick overview and timesaving support in his perfectly timed everyday life. They know how to take advantage of digital and mobile media in order to achieve this goal. Smartphones and tablet computer belong to their standard equipment and using apps is part of their daily routine. Their usage of print media is above average. They have a wide range of interest with a focus on technologically related topics.

Type 4: Mobile Networker (potential: 11%)

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 serves as a source of information. Social networks 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 (potential: 5%)
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 7: Family-oriented Selective (potential: 18%)
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 6: Entertainment-oriented Offliner (potential: 25%)
This is the oldest, mainly female type with low education and low income who favours primarily popular 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 8: Uninterested media Grouch (potential: 8%)
The poorly educated and lowincome media grouch is neither fond of classical nor digital media types. Only an interesting football match will draw him towards the TV screen.

For initial orientation

Implementation Media User Groups

Media user groups serve to achieve an initial categorization of users within the individual media types. They are divided into four groups representing their use intensity.

The frequency of contact with a media of a particular type, for example with magazines, indicates which of the four groups a user belongs to. The frequency of contact data is summed up and, depending on the amount of the sum, the interviewee will belong to one of the four categories.

The median principle is applied on this process: Consequently the statistic distribution is cut into four parts. The upper, most contact-intensive quarter is referred to as "++", the lowest, contact-weakest, as "- -".

(Basis for this division is the distribution of the weighted total random sample or the subpopulations, in which the respective media use can take place in principle.)

b4p 2016 I -- Strukturanalyse
Grundgesamtheit: Deutschsprachige Bevölkerung ab 14 Jahre - Potenzial: 100,0 %, 30.190 Fälle, 69,5
Werbeträger

| | Basis | | Zielgruppen | |
| | | | Entscheider Geldanlagen | |
	Mio.	% vert.	% vert.	Index
Basis	69,56	100	100	100
Medianutzergruppen Zeitschriften				
Zeitschriften ++	17,40	25	27	107
Zeitschriften +	17,35	25	28	114
Zeitschriften -	17,37	25	26	104
Zeitschriften --	17,44	25	19	75
Medianutzergruppen Zeitungen				
Zeitungen ++	16,73	24	33	138
Zeitungen +	17,83	26	25	97
Zeitungen -	17,68	25	25	97
Zeitungen --	17,32	25	17	70
Medianutzergruppen Print (Zeitungen und Zeitschriften)				
Print (Zeitungen und Zeitschriften) ++	17,40	25	28	111
Print (Zeitungen und Zeitschriften) +	17,39	25	29	115
Print (Zeitungen und Zeitschriften) -	17,41	25	25	101
Print (Zeitungen und Zeitschriften) --	17,36	25	18	73
Medianutzergruppen TV				
TV ++	16,64	24	18	76
TV +	16,63	24	26	109
TV -	16,53	24	27	114
TV --	16,72	24	29	119
TV Nicht EU-Ausländer	3,04	4	0	0
Medianutzergruppen Radio				
Radio ++	17,35	25	36	142
Radio +	17,26	25	29	116
Radio -	17,30	25	21	85
Radio --	17,65	25	14	57
Medianutzergruppen Online (Stationär)				
Online (Stationär) ++	13,23	19	23	122
Online (Stationär) +	13,25	19	25	131
Online (Stationär) -	13,23	19	25	133
Online (Stationär) --	13,25	19	18	96
Online (Stationär) Nicht-Nutzer	16,61	24	8	34

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Media Compass

How can I reach my target group?

The Media Compass provides quick insights

The Media Compass is a tool to support strategic planning. It provides relevant information for media genres and their subcategories in a single measured value.

Construction method:
Depending on his contact frequency with this media genre, every surveyed consumer is allotted a value between 0 (= no contact) and 100 (= very high number of contacts). The resulting 'compass figure' is compared to the respective value of the basic target group.

Interpretation:
The resulting index provides direct information to which media genres or sub categories the target group has a high affinity, – and to which it has not.
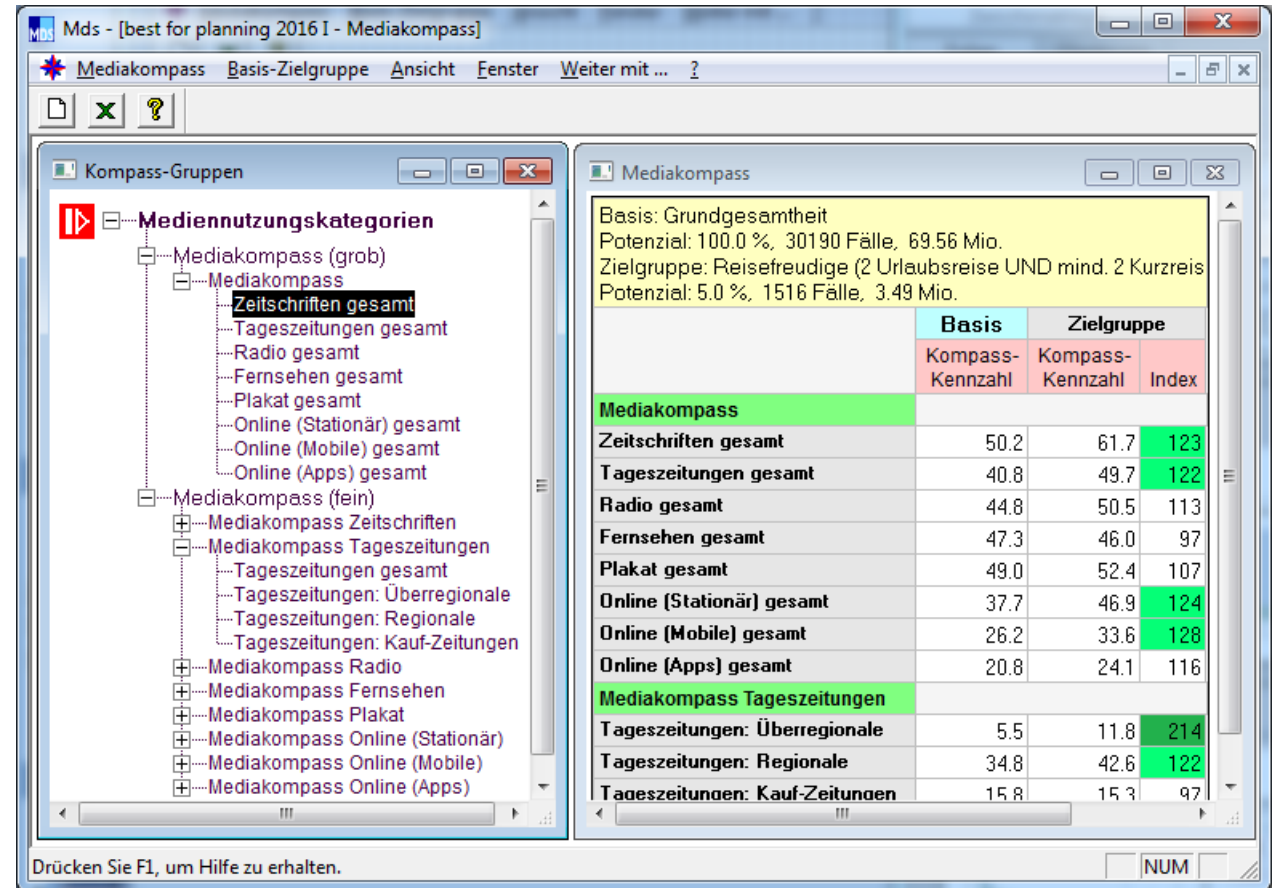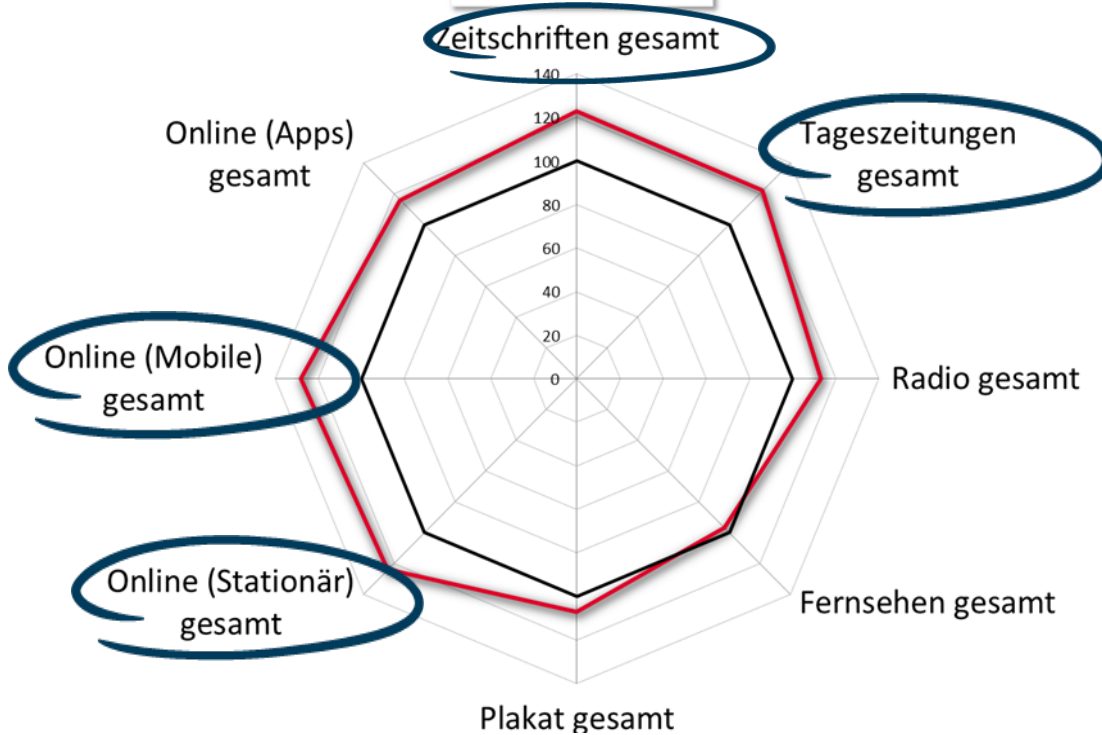
Example Media Compass for "extensive travellers" (overview and in detail)
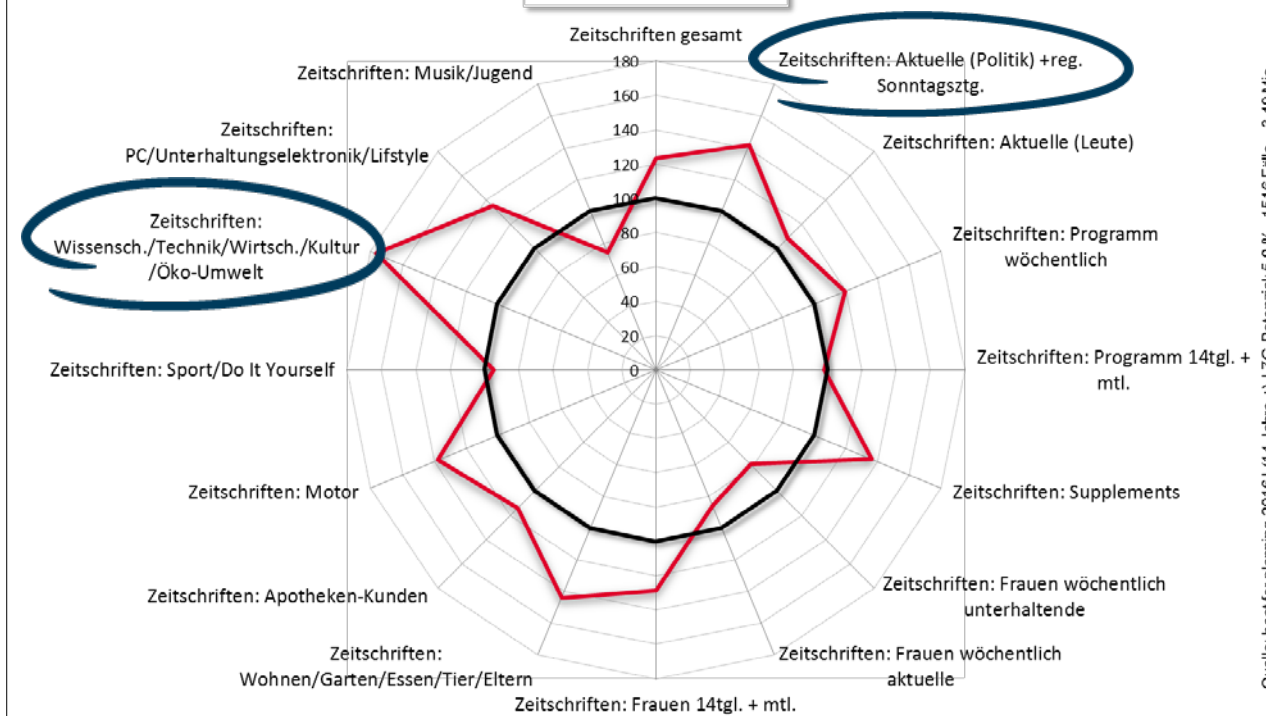
6
FUTURE PROSPECTS, EVALUATION AND CONTACT
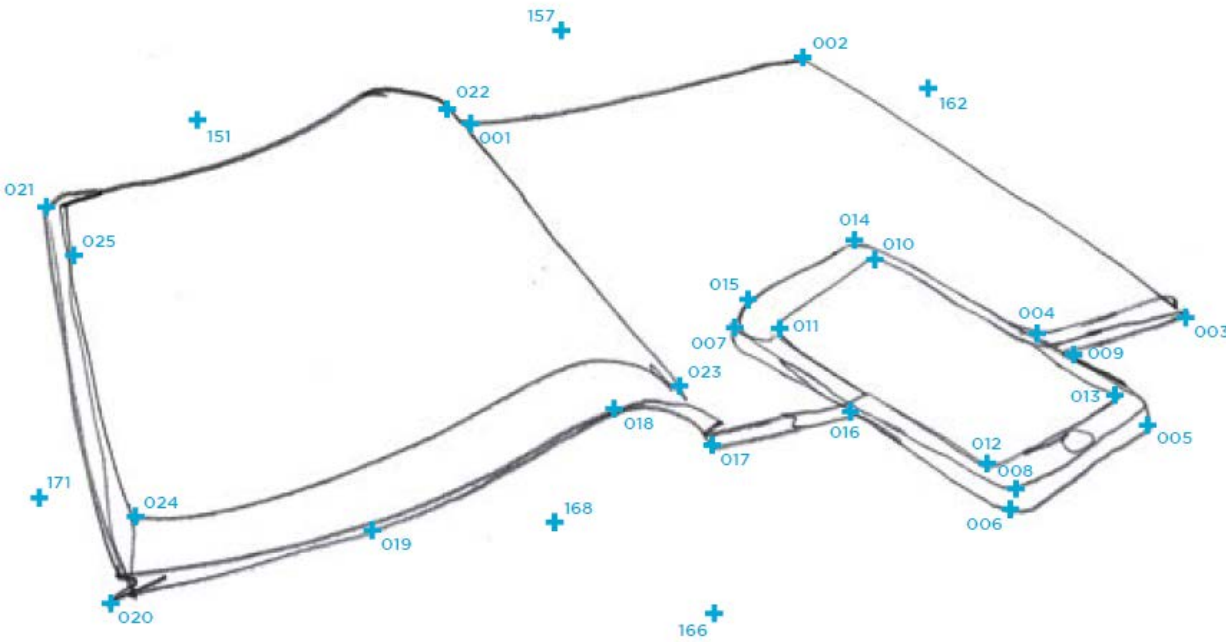
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Analysis Programs

Media planning programs

+ 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
  Marktforschung
  Telephone: 040 34 72 25 07
  Mail: mds-service@axelspringer.de

+ Network-enabled Windows version for individual survey evaluation.
+ With its easy user guidance throughout, the program provides a very large variety of analysis options for beginners as well as for media planning professionals.

+ Contact:
  COMsulting
  Gerhard Faehling GmbH
  Telephone: 045 03 35 35 0
  Mail: info@medimach.com

+ A web-based, platform-independent media planning evaluation software (print, radio, TV, online, cinema, posters) 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 reach

September 2016	December 2016	March 2017	September 2017
+ Adaption to ma 2016 Presse II (magazines, daily newspapers) and ma 2016 Internet 3 (online offers) as well as fusion on the basis of ma 2015 Intermedia PLuS (posters, TV) and ma 2016 Radio II	**+** Fusion on the basis of ma 2016 Intermedia PLuS (TV), ma 2016 Radio II Update und ma 2016 Poster	**+** New adjustment to ma 2017 Presse I (magazines, daily newspapers) and to ma 2016 Internet 9 (online offers)	**+** Release of b4p 2017

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THANK YOU!

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