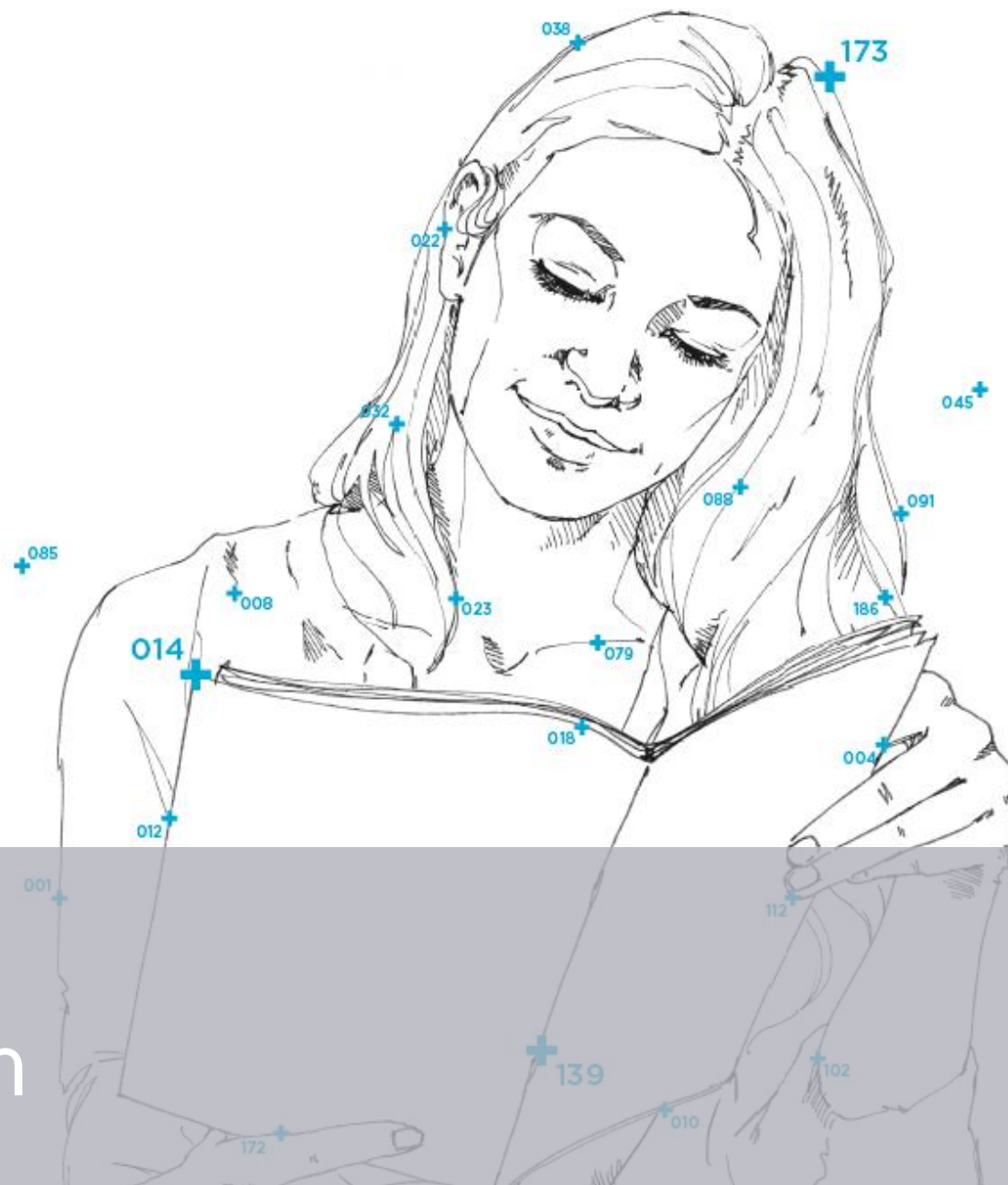+2017

Interlink data
in a meaningful
way

b4p best for
planning.

best for planning
Basic Presentation

b4p best for
planning.

Agenda

1 **Basics**

2 **Methodology**

3 **People**

4 **Markets**

5 **Media**

6 **Future Prospects, Evaluation and Contact**

b4p best for planning.

1
BASICS

Information is the Key!

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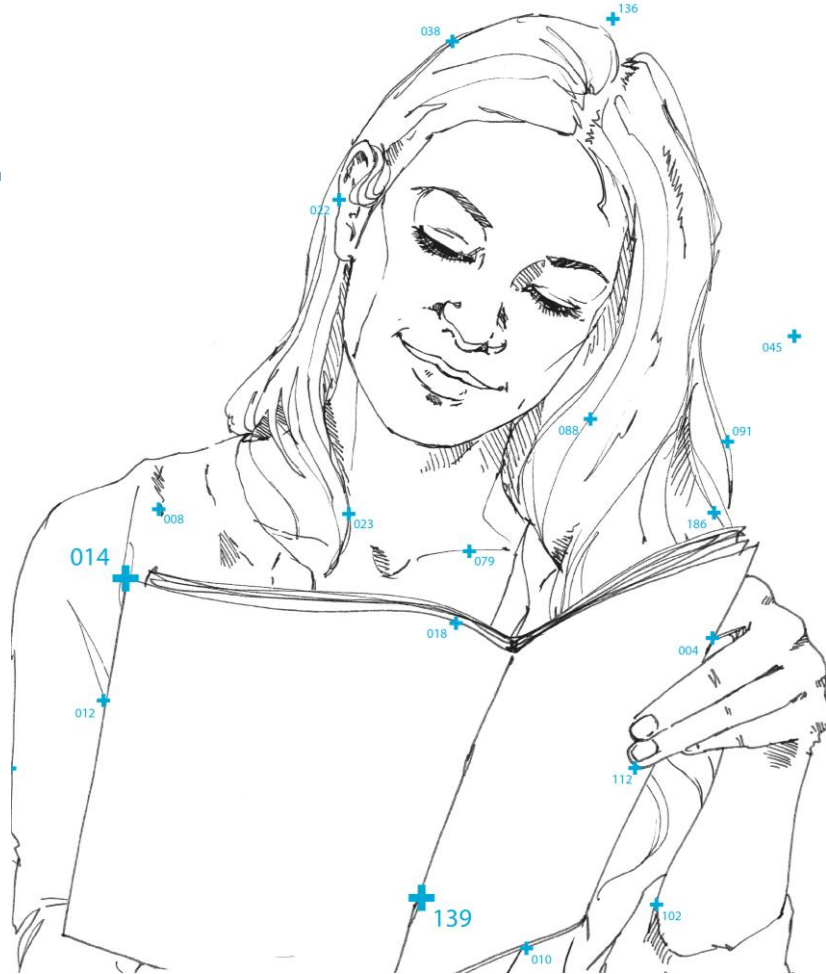
Good reasons for best for planning

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.

30,121 surveyed consumers

German-speaking resident population over 14 years of age in Germany

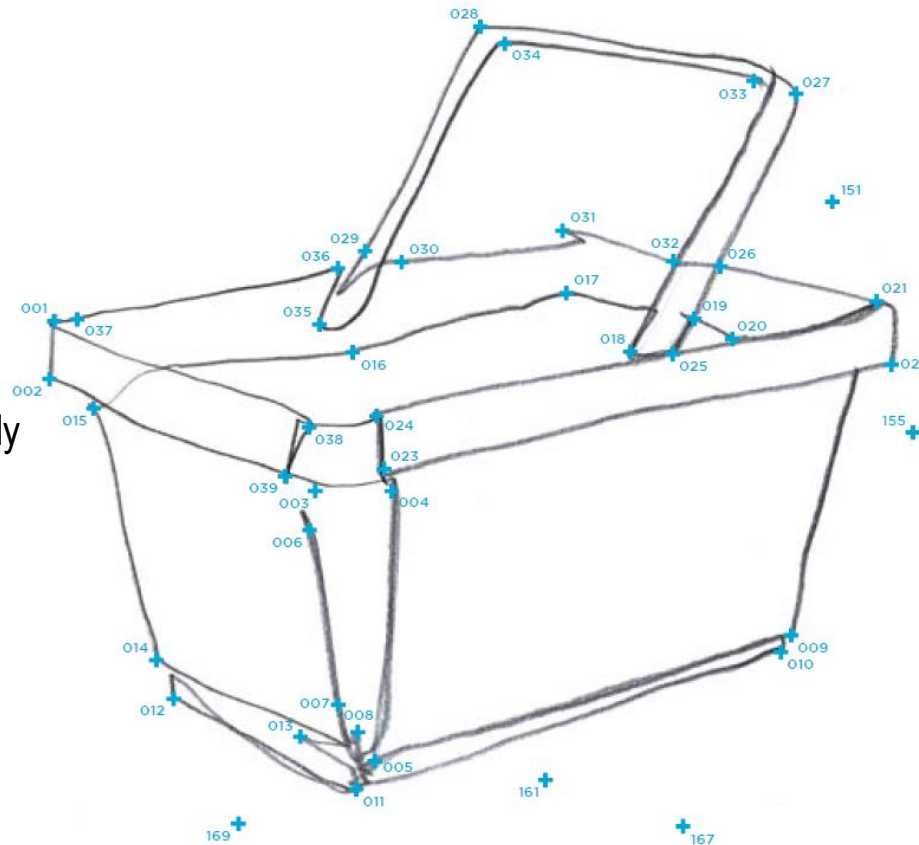Representative for 70.09 million people

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

14 advisor sections

44 interest in product information

57 brand relevance sections

10 sector typologies

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.
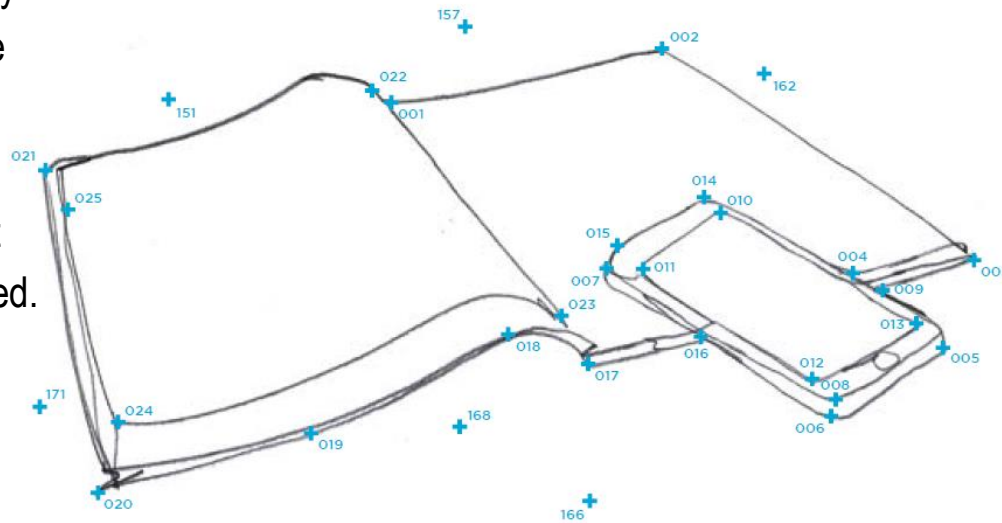
179 magazine titles

59 booking units of daily newspapers

811 websites

373 mobile offers

184 apps

10 TV stations

radio

poster

cinema

Cross media brand reach & combinations

b4p best for planning.

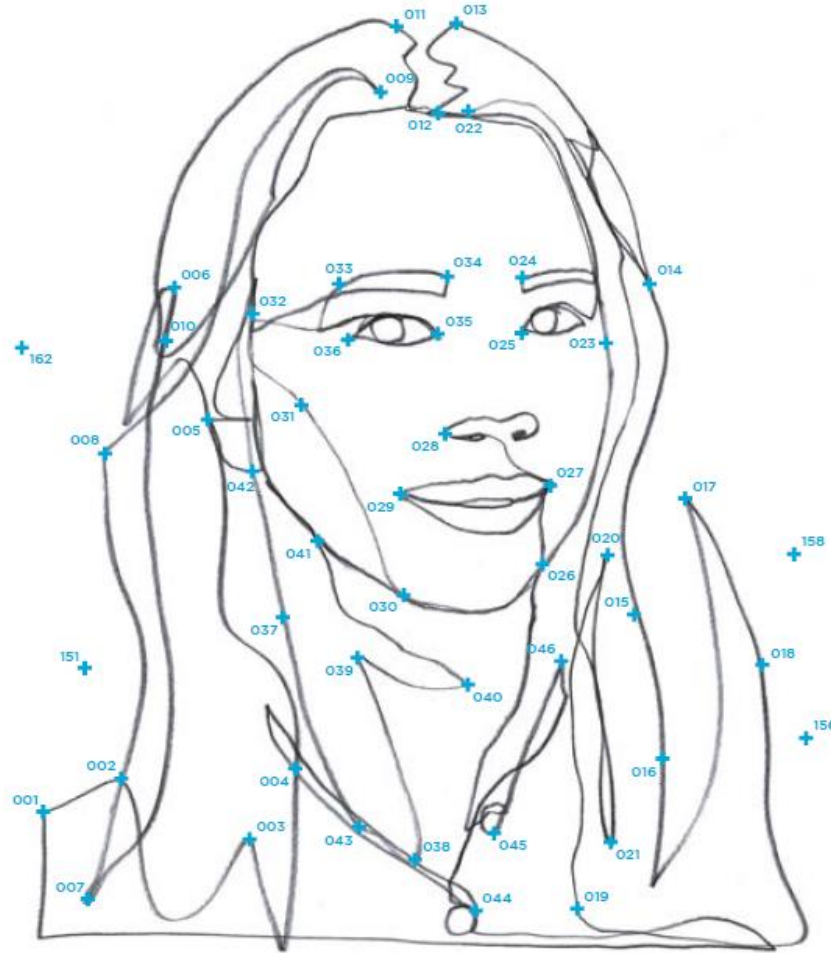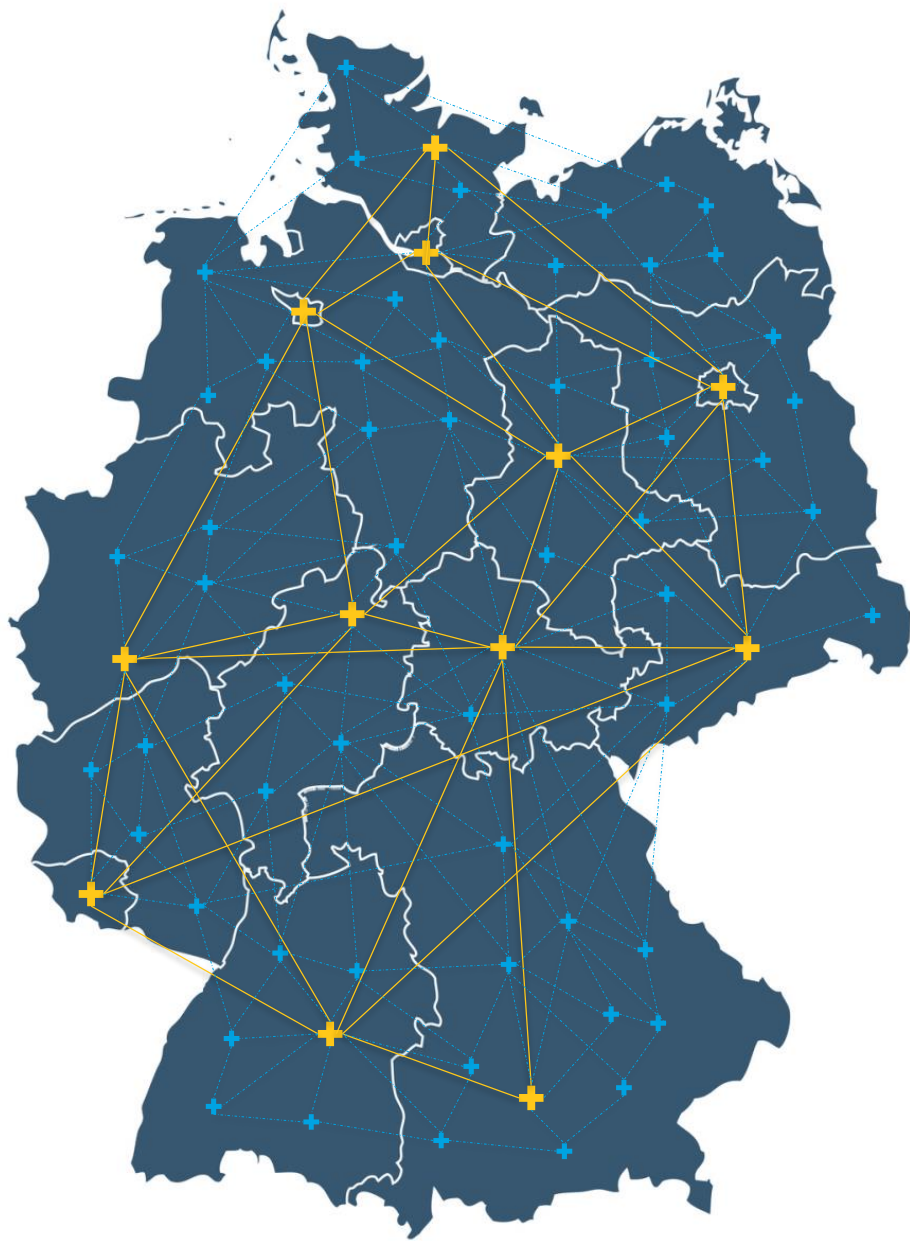Good reasons for best for planning

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.

144 attitudes

10 changes in life

60 leisure activities

18 aspects of life

27 target group models

10 future prospects

b4p best for planning.

2
METHODOLOGY

Multi-Source Approach

b4p provides outstanding quality

Survey (Face-to-Face Inhome) n = 30,121

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 = 10,231

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

b4p best for planning.

Methodology

First-class quality standards

+ SAB & CAPI/CASI

Universe:	German-speaking resident population over 14 years of age in Germany (70.09 Mio.)
Sampling:	ADM sampling, random address selection
Number of cases:	30,121 cases
Institutes:	GfK Media & Communication Research, IFAK, Ipsos
Survey Period:	September 2015 until April 2016 September 2016 until April 2017
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 (70.09 Mio.)
Sampling:	Stationary use: 10,231 cases Mobile use of websites & apps: 4,168 cases
Institutes:	GfK SE
Survey Period:	January 2016 until March 2016 January 2017 until March 2017
Panel:	GfK Crossmedia Link

b4p best for planning.
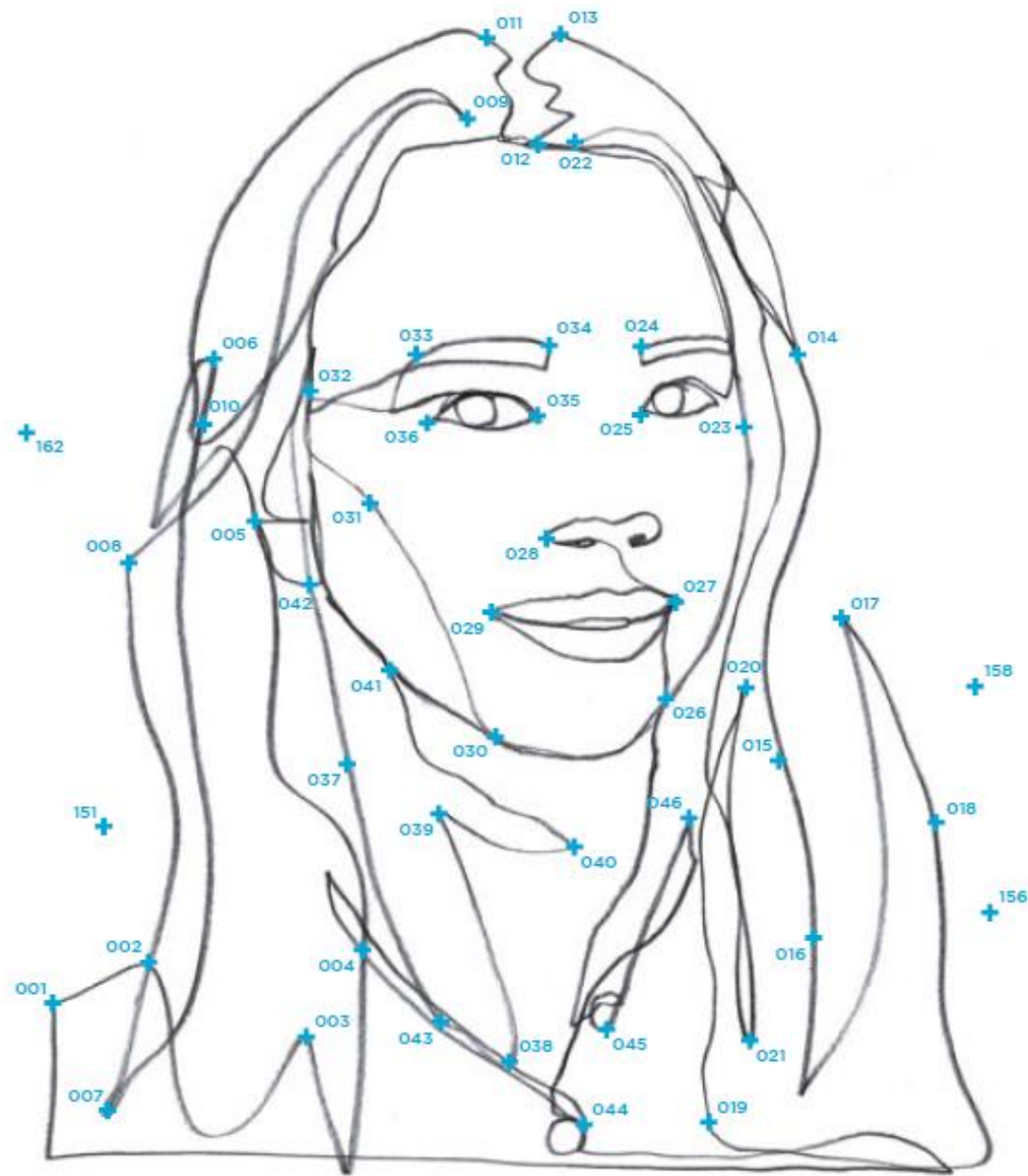
3
PEOPLE

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
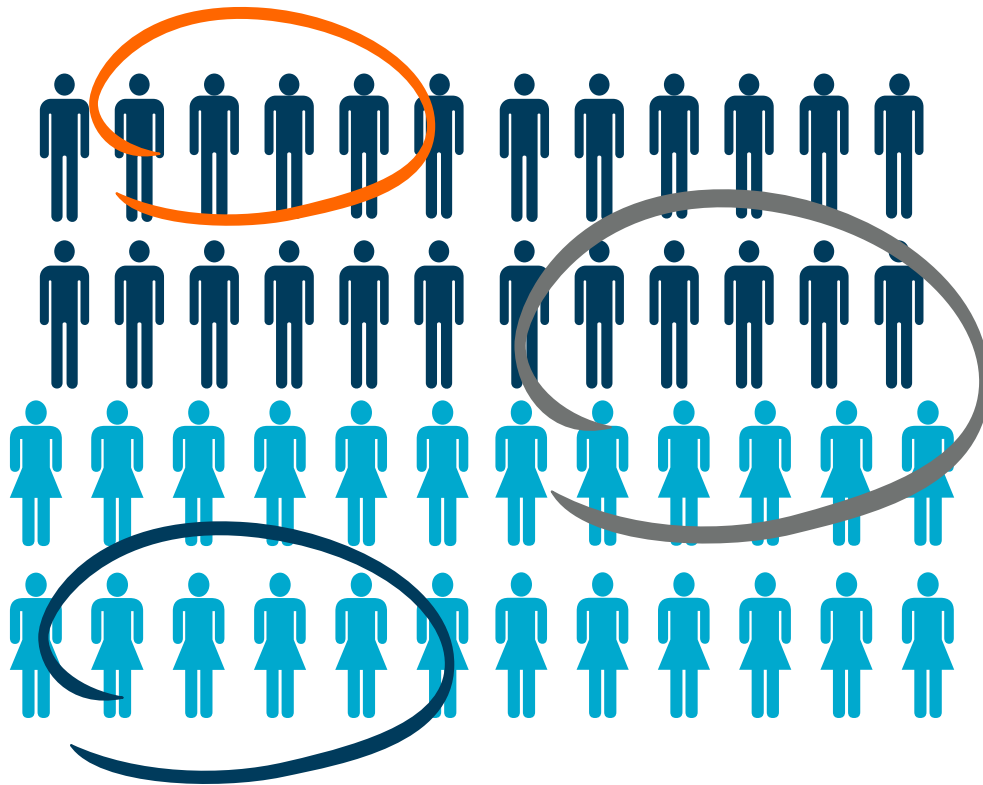- Personal income
- Commercial sector

Mobility

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

b4p best for planning.

Demographic Target Groups

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

+

- Compact or multifunction kitchen machines
- Sleeping pills and tranquilizers
- Dog and cat food
- New statement on change
- Future prospects/changes in society
- Interest in information and product information to renewable energy
- Statement on internet/social media
- Statement on the topic of mobile networks
- Care of babies/infants
- Time of vacation planning/booking
- Statement on investments

…and much more

New in b4p 2017

b4p best for planning.

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

Healthy environment

Individuality

Fun and joy

…

18 Items

Spheres of Life

Luxury makes life better

I try to stay fit by doing sports regularly

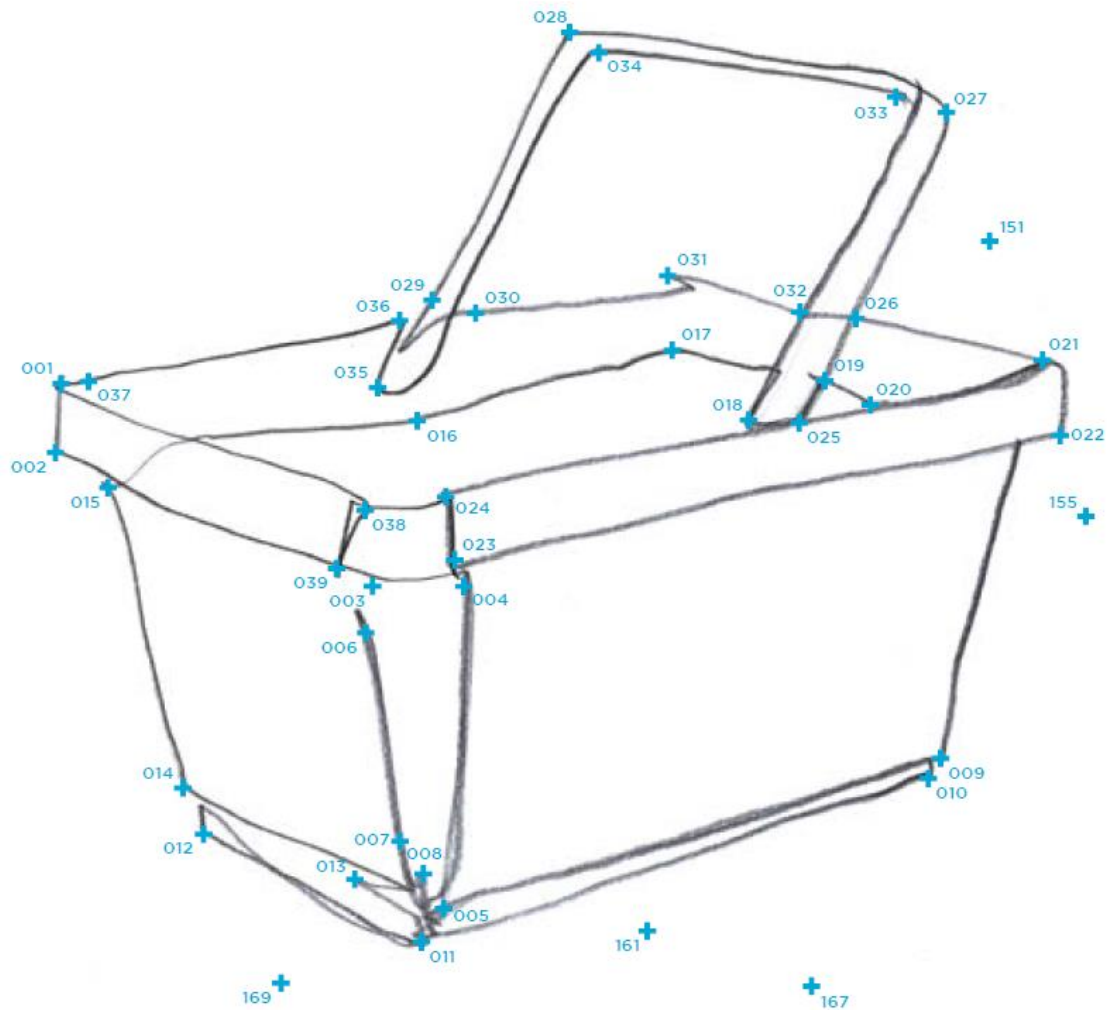I gladly take on responsibility

…

42 Items

b4p best for planning.

Psychographic Target Groups

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

b4p best for planning.

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

b4p best for planning.

Comprehensive Features

… and uncovers consumer behaviour in Germany.

Purchasing Decisions

Tablets

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

…

96 Items

Interest in Product Information

Decorative cosmetics

Bags, travel bags, leather goods

Apps/applications for mobile phones

Furniture and furnishing

Short trips

…

44 Items

Role as Advisor

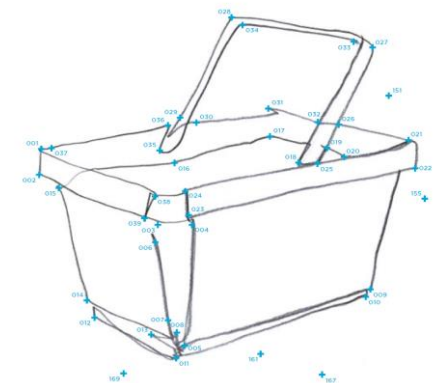Consumer electronics

Fashion

Cosmetics

Food

…

14 Items

Brand/Price Awareness

Non-alcoholic beverages

Confectionery, snack items

Perfumes/scents/eau de toilette/aftershave

Mobile phones, smartphones

Household appliances …

57 Items

b4p best for planning.

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, sub brands only if they are perceived as independent by the interviewee

Markets

Media

People

b4p best for planning.
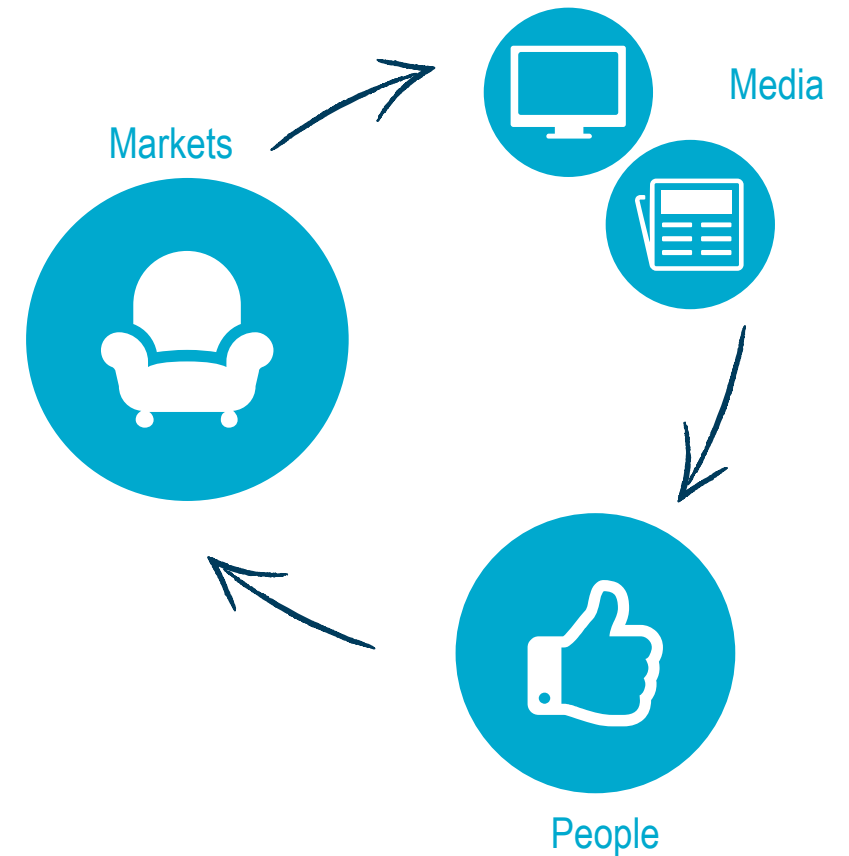
Markets and Brands

Annual updates of brands

New in b4p 2017

+ New brands in…

Mineral/Bottled water

Breakfast cereals

Mobile provider

Mobile Phone/Smartphone
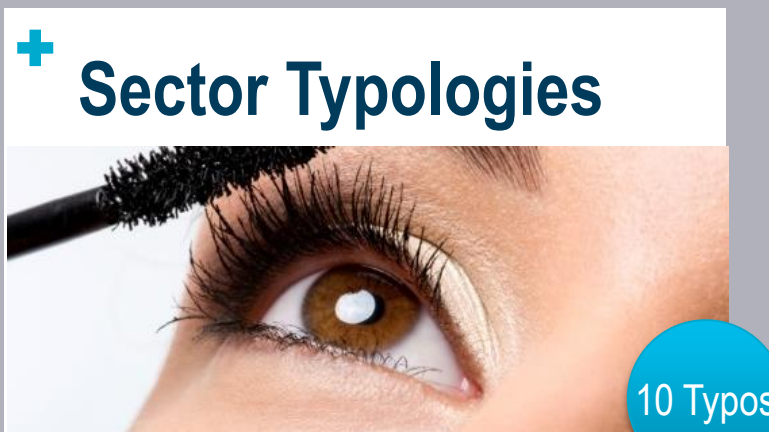
Food processors

Detergents

Airlines

Fast food restaurants/Coffee Shops

Places of purchase - Food

… 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

Luxury affinity

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)

b4p best for planning.

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
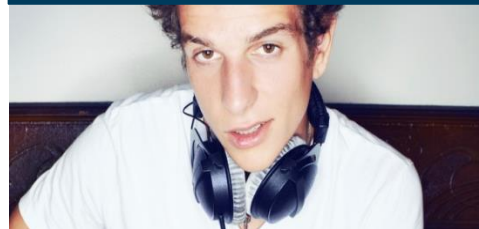
Beauty Woman
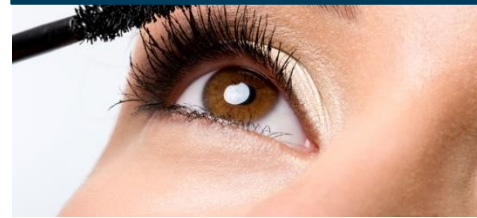
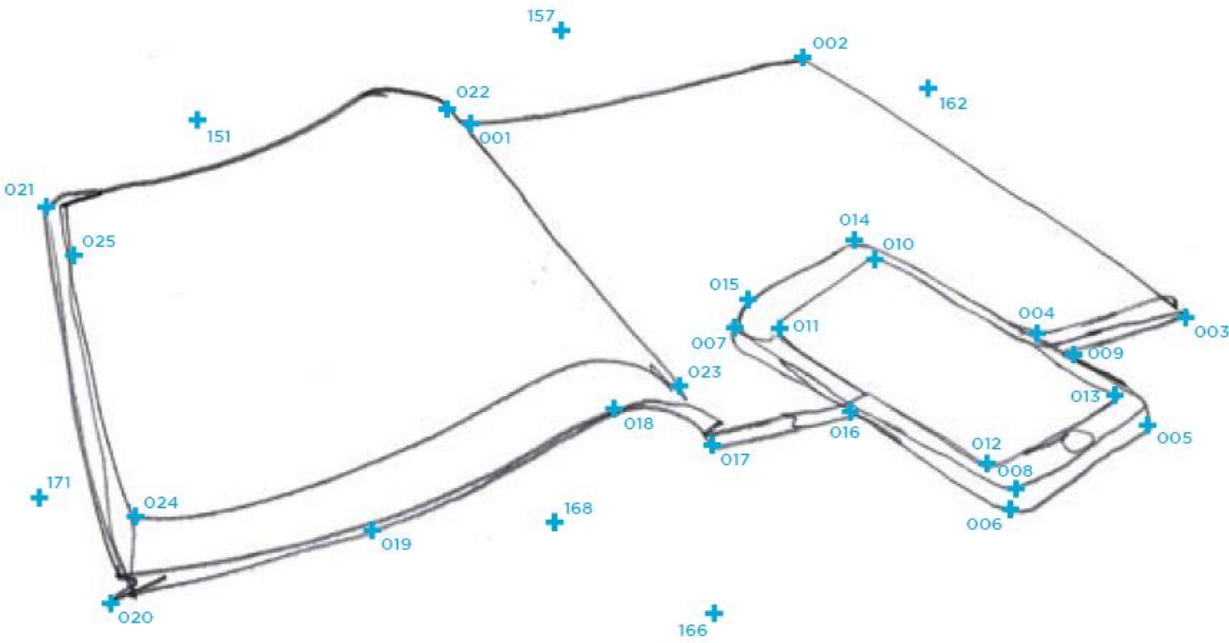**Beauty Men**

Food

Car & Mobility

b4p best for planning.

5
MEDIA

Media in b4p 2017

179 Magazines,
Reader circle

59 Booking units of
daily newspapers

Posters

811 Websites,
602 Booking units

373 Mobile Sites/
MEWs

184 Apps

Cinema

Radio

10 TV
stations

b4p best for planning.
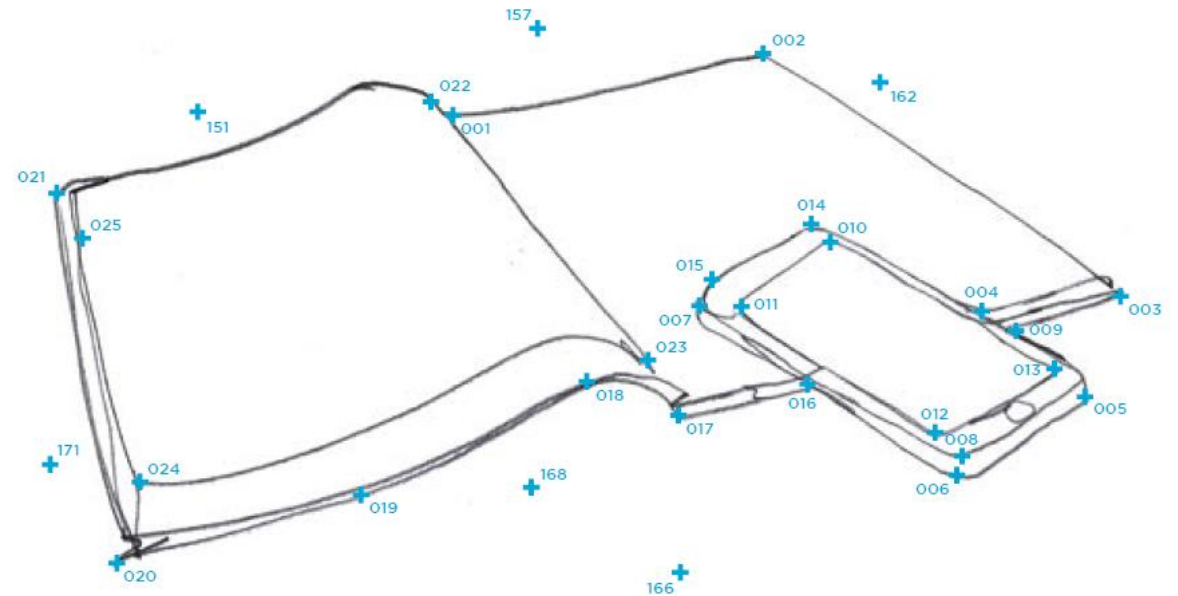
Representation Requirements

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

b4p best for planning.

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

b4p best for planning.

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.

b4p best for planning.
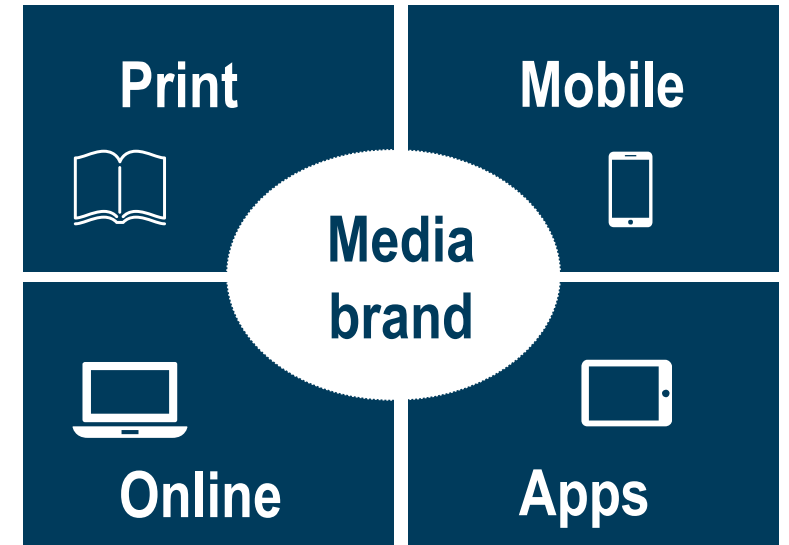
Evaluate Overlaps of Media Channels and Total Reach with b4p
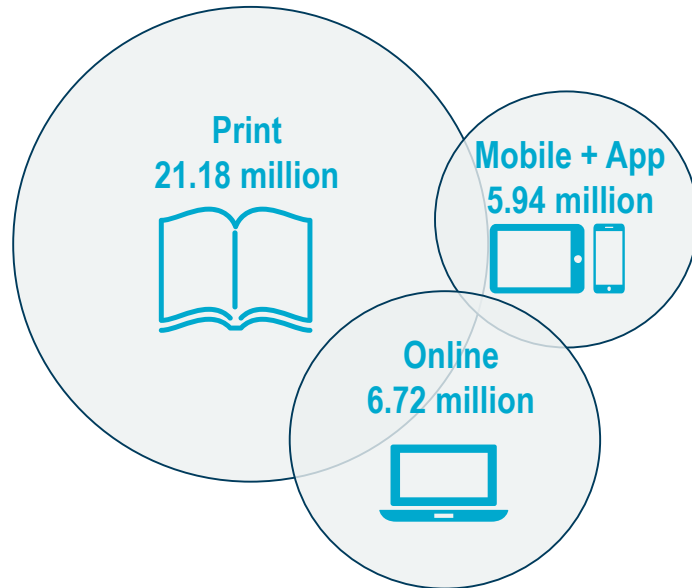
Net reach BILD: 28.73 million

(time horizon: week)

Overlapping
(on weekly basis)

	in Mio.
• BILD DEUTSCHLAND GESAMT (Print) / BILD.de (Internet)	2.10
• BILD DEUTSCHLAND GESAMT (Print) / BILD (Mobile + App)	2.13
• BILD.de (Internet) / BILD (Mobile + App)	1.47
• BILD DEUTSCHLAND GESAMT (Print) / BILD.de (Internet) / BILD (Mobile + App)	0.58

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: 10.13 million

(time horizon: week)

Overlapping

(on weekly basis)

Print
6.83 million

Mobile + App
2.19 million

Online
1.98 million

	in Mio.
• stern (Print) / stern.de (Internet)	0.30
• stern (Print) / STERN (Mobile + App)	0.37
• stern.de (Internet) / STERN (Mobile + App)	0.34
• stern (Print) / stern.de (Internet) / STERN (Mobile + App)	0.08

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

Evaluate Overlaps of Media Channels and Total Reach with b4p
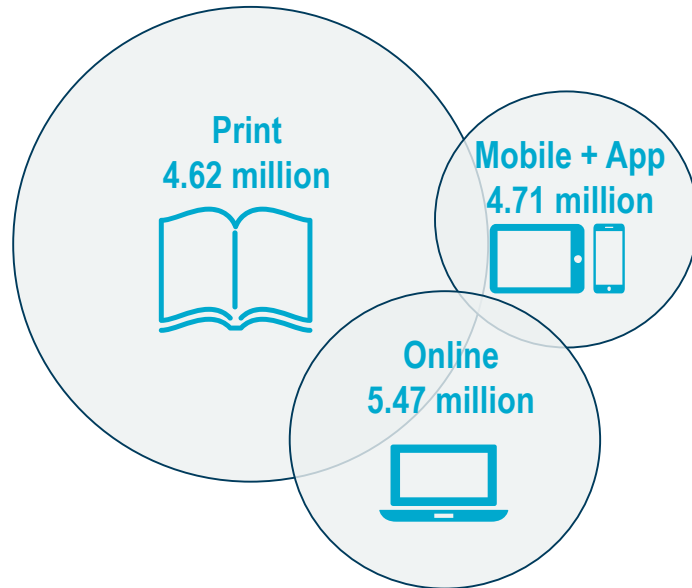
Net reach Focus: 13.07 million

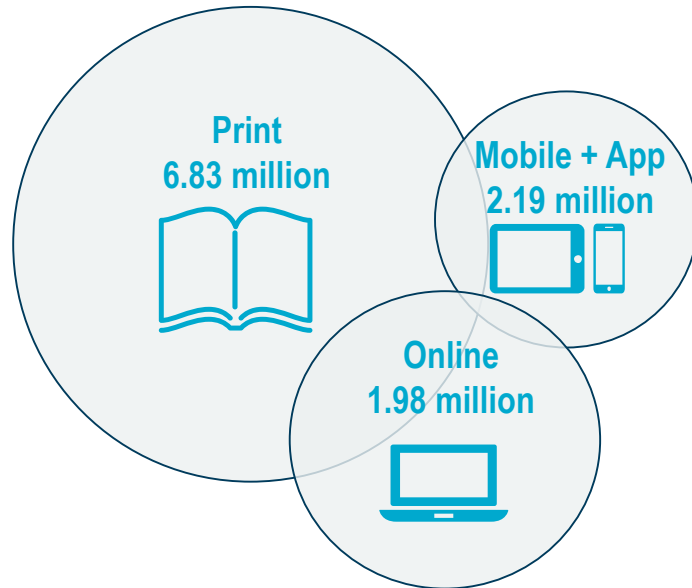(time horizon: week)

Overlapping

(on weekly basis)

	in Mio.
• Focus (Print) / focus.de (Internet)	0.47
• Focus (Print) / Focus (Mobile + App)	0.52
• focus.de (Internet) / Focus (Mobile + App)	0.86
• Focus (Print) / focus.de (Internet) / Focus (Mobile + App)	0.12

Print
4.62 million

Mobile + App
4.71 million

Online
5.47 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

b4p best for planning.
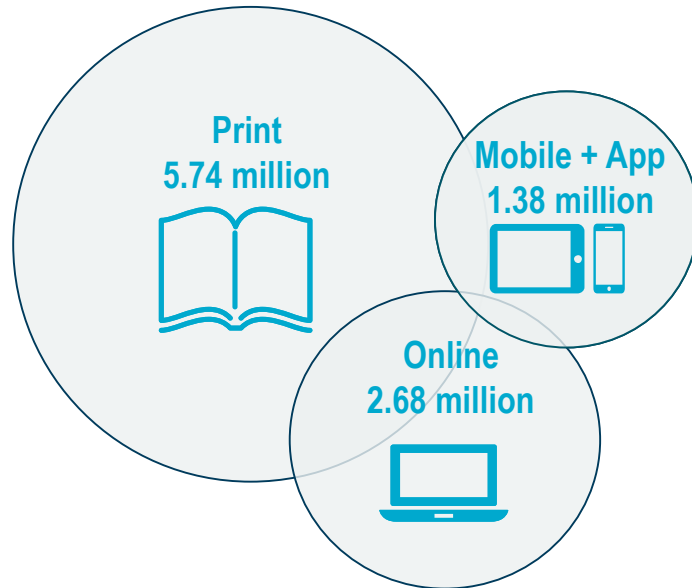
Net reach TV Movie: 8.82 million
(time horizon: month)

Overlapping
(on monthly basis)

	in Mio.
• TV Movie (Print) / tvmovie.de (Internet)	0.35
• TV Movie (Print) / TV Movie (Mobile + App)	0.33
• tvmovie.de (Internet) / TV Movie (Mobile + App)	0.41
• TV Movie (Print) / tvmovie.de (Internet) / TV Movie (Mobile + App)	0.11

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
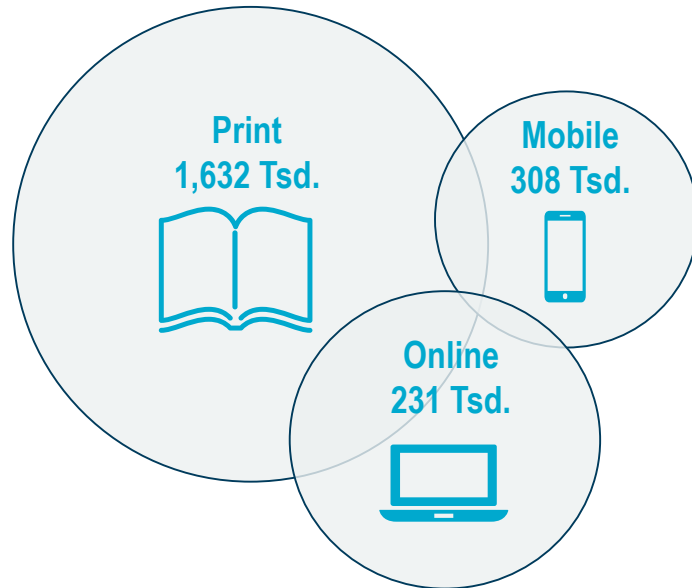
Cross media combination Funke Medien NRW 850: 2,100 thousand
(time horizon: day)

Overlapping
(on daily basis)

in thsd

- Funke Medien NRW 850 (Print) /
  Funke Medien NRW OMS (Internet)   29
- Funke Medien NRW 850 (Print) /
  Funke Medien NRW OMS (Mobile)   37
- Funke Medien NRW OMS (Internet) /
  Funke Medien NRW OMS (Mobile)   7
- Funke Medien NRW 850 (Print) /
  Funke Medien NRW OMS (Internet) /
  Funke Medien NRW OMS (Mobile)   1

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

Print
1,632 Tsd.

Mobile
308 Tsd.

Online
231 Tsd.

Qualitative Media-Insights enough and to spare

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

+ Media in general

16 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 …

Reading venues:

8 Items

- At home
- When in waiting rooms
- At the hairdresser´s
- At work/in the office   …

b4p best for planning.

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
- Formula 1
- Reality shows
- Adventure/Action
- Daily Soaps
- Cooking shows

…

+ Internet & Social Media

Activities:

16 Items

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

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

b4p best for planning.

Media User Typology

- Entertainment-based free timer — 5%
- Classic info elite — 23%
- Family-oriented selective user — 19%
- Entertainment-oriented offliner — 24%
- Uninterested media grouch — 8%
- Continuous info scanner — 6%
- Digital organised Pragmatician — 4%
- Mobile networker — 11%

b4p best for planning.
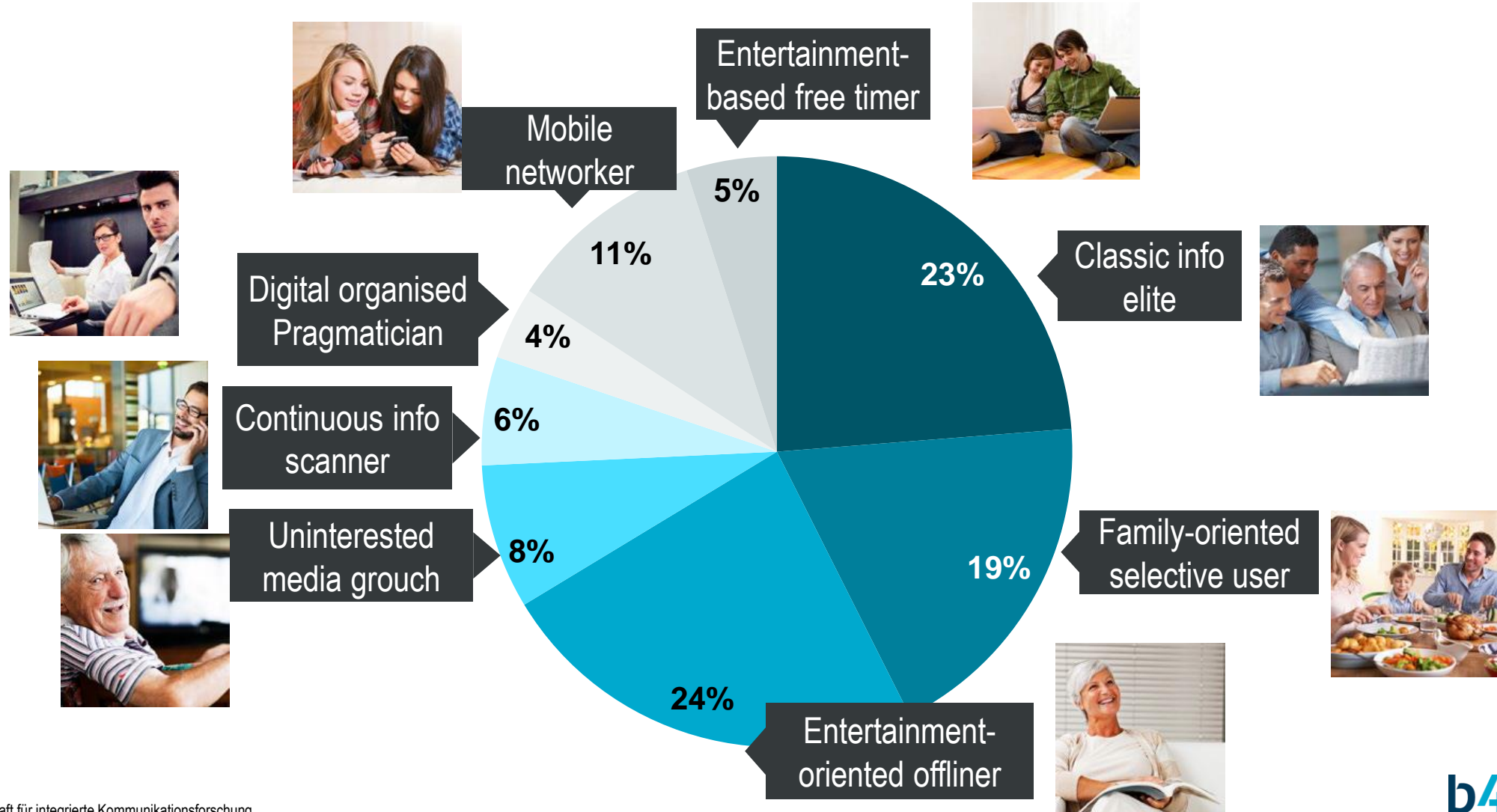
Type 1: Classical info elite (potential: 24%)

This highly educated, highincome 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: Digital organised Pragmatician (potential: 4%)

This is the type with the highest income and they are searching for ways to get a quick overview and time-saving 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-based free timer (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 user (potential: 19%)
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: 24%)
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 2017 I mit Sinus-Milieus und Limbic-Types -- Strukturanalyse
Gesamt - Potenzial: 100,0 %, 30.121 Fälle, 70,09 Mio.
Werbeträger

| | Basis | | Zielgruppe | |
| | | | Entscheider Geldanlagen | |
	Mio.	% vert.	% vert.	Index
Basis	70,09	100	100	100
Medianutzergruppen Zeitschriften				
Zeitschriften ++	17,49	25	27	109
Zeitschriften +	17,53	25	26	104
Zeitschriften -	17,51	25	25	99
Zeitschriften --	17,57	25	22	87
Medianutzergruppen Zeitungen				
Zeitungen ++	17,50	25	27	109
Zeitungen +	17,51	25	26	106
Zeitungen -	17,51	25	25	101
Zeitungen --	17,58	25	21	84
Medianutzergruppen Print (Zeitungen und Zeitschriften)				
Print (Zeitungen und Zeitschriften) ++	17,52	25	28	110
Print (Zeitungen und Zeitschriften) +	17,54	25	26	105
Print (Zeitungen und Zeitschriften) -	17,46	25	25	99
Print (Zeitungen und Zeitschriften) --	17,57	25	21	86
Medianutzergruppen TV				
TV ++	17,58	25	26	102
TV +	17,44	25	25	100

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.
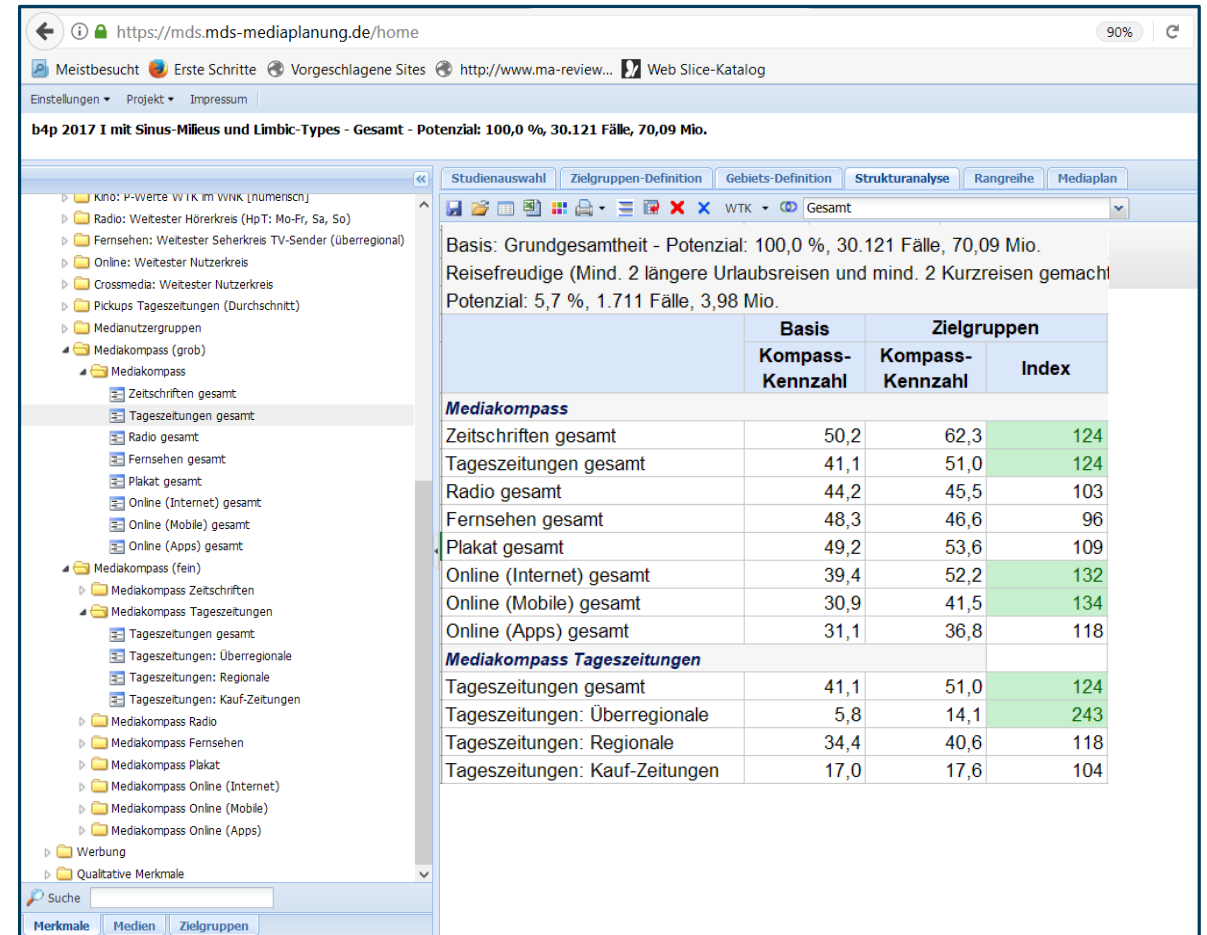
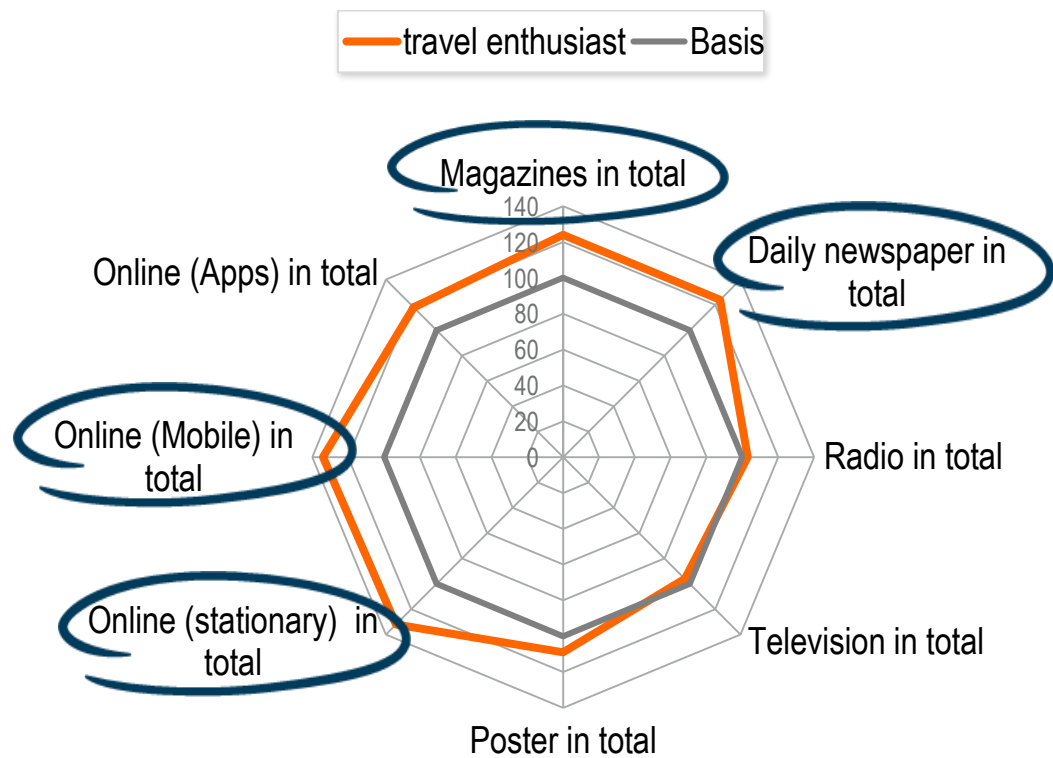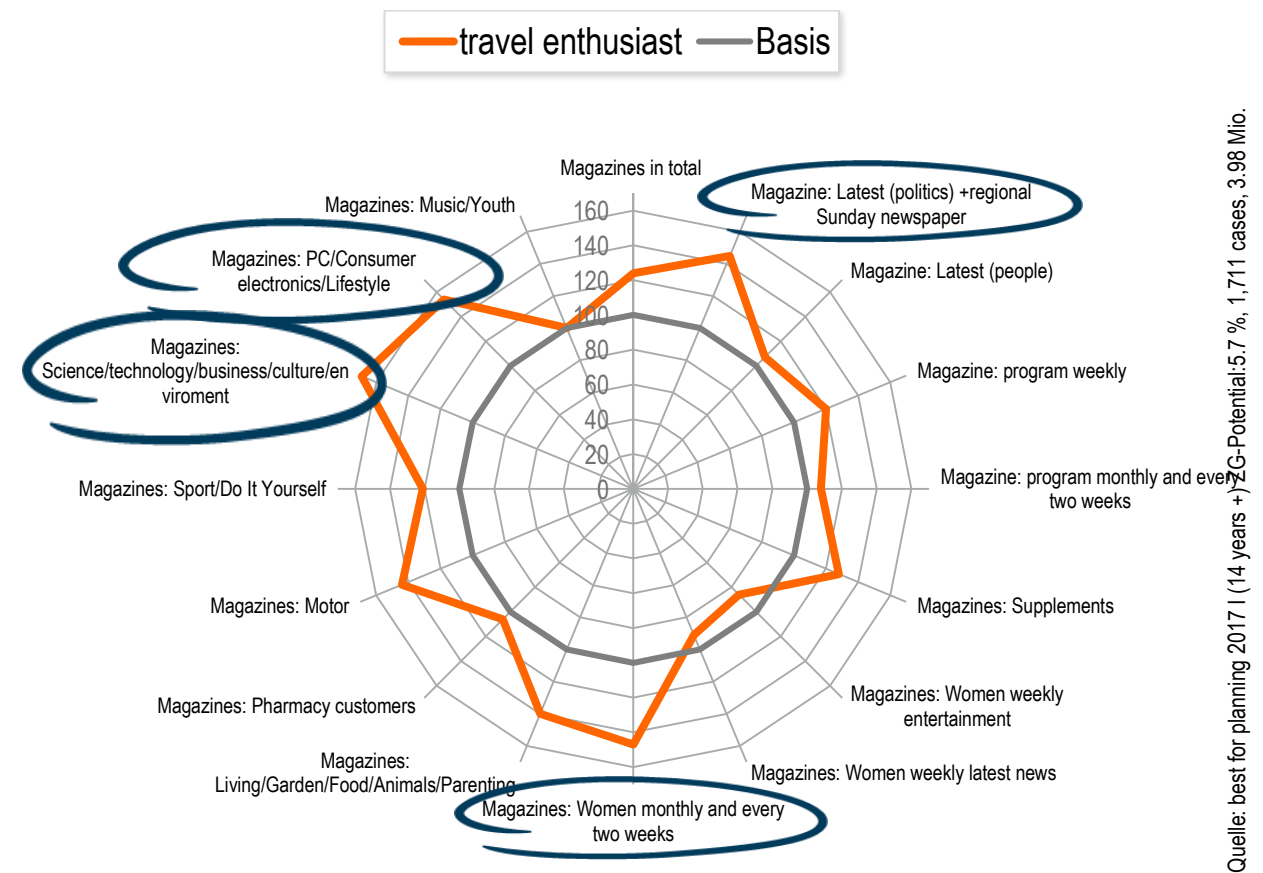# Insights Media Use

Example Media Compass for "extensive travellers" (overview and in detail)

Legend: travel enthusiast, Basis

Left chart axes: Magazines in total, Daily newspaper in total, Radio in total, Television in total, Poster in total, Online (stationary) in total, Online (Mobile) in total, Online (Apps) in total
Scale: 0, 20, 40, 60, 80, 100, 120, 140

Right chart axes: Magazines in total, Magazine: Latest (politics) +regional Sunday newspaper, Magazine: Latest (people), Magazine: program weekly, Magazine: program monthly and every two weeks, Magazines: Supplements, Magazines: Women weekly entertainment, Magazines: Women weekly latest news, Magazines: Women monthly and every two weeks, Magazines: Living/Garden/Food/Animals/Parenting, Magazines: Pharmacy customers, Magazines: Motor, Magazines: Sport/Do It Yourself, Magazines: Science/technology/business/culture/enviroment, Magazines: PC/Consumer electronics/Lifestyle, Magazines: Music/Youth
Scale: 0, 20, 40, 60, 80, 100, 120, 140, 160

Quelle: best for planning 2017 I (14 years +) ZG-Potential:5.7 %, 1,711 cases, 3.98 Mio.

6

FUTURE PROSPECTS, EVALUATION AND CONTACT

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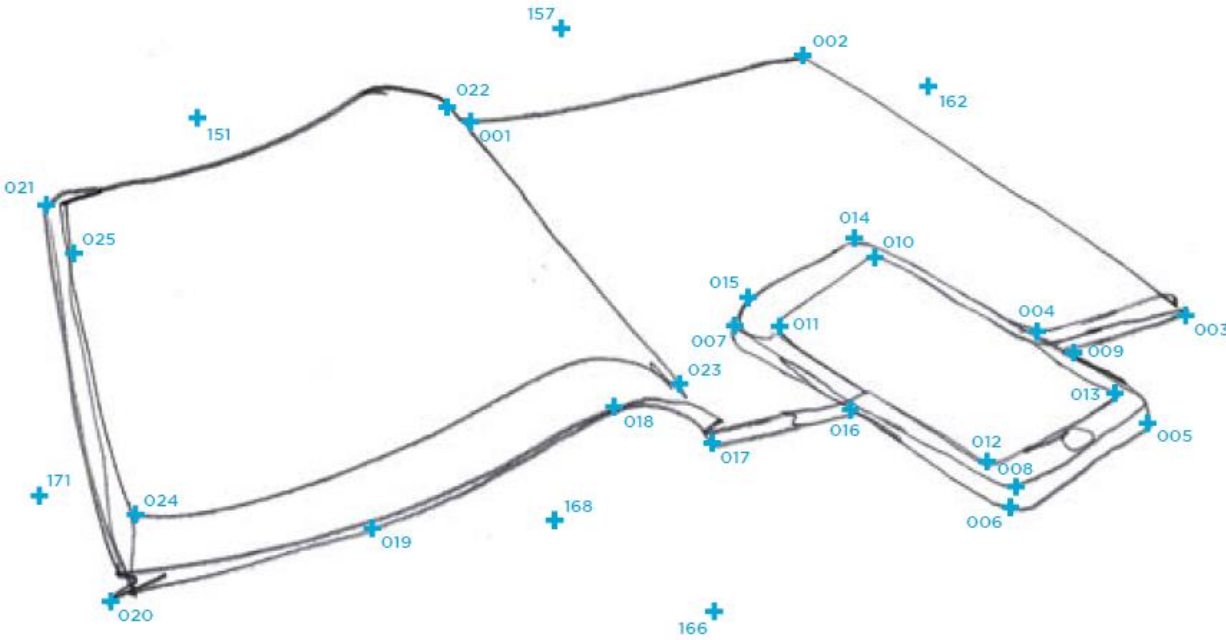
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Analysis Programs

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

medi MACH

- Network-enabled Windows and Online 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
  Telephone: 045 03 35 35 0
  Mail: info@medimach.com

m CLOUD

- 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 2017	Januar 2018	March 2018	September 2018

September 2017
- ✚ Adaption to ma 2017 Presse II (magazines, daily newspapers) and ma 2017 Internet 3 (online offers) as well as fusion on the basis of ma 2016 Intermedia PLuS (TV), ma 2017 Radio II and ma 2016 Poster

Januar 2018
- ✚ Fusion on the basis of ma 2017 Intermedia PLuS (TV), ma 2017 Radio II Update und ma 2017 Poster

March 2018
- ✚ New adjustment to ma 2018 Presse I (magazines, daily newspapers) and to ma 2017 Internet 9 (online offers)

September 2018
- ✚ Release of b4p 2018

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THANK YOU!

Gesellschaft für integrierte
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