best for planning 2018

Basic Presentation
Agenda

1. Basics
2. Methodology
3. People
4. Markets
5. Media
Basics
Market data bundled under one roof

The „Gesellschaft für integrierte Kommunikationsforschung“, shortly GIK, is a joint venture of 5 big media companies: Axel Springer SE, Bauer Media Group, Funke Mediengruppe, Gruner + Jahr GmbH and Hubert Burda Media. They jointly set up market-media-studies, to allocate data for advertising planning for clients and market partners. The GIK provides two cross media market and media studies to evaluate the use of advertisements: best for planning (b4p) helps to choose the right communication channel in advance. best for tracking (b4t) proves afterwards the efficiency thereof.
Since 2013 b4p analyzes media usage and the consumers' behavior comprehensively. For brand managers best for planning is a valuable data source, enabling strategic planning.

**Markets**
With its survey on about 2,400 brands in approx. 120 market segments, b4p remains the most comprehensive market media study in Germany.

**Media**
b4p pictures all major media channels: Including 185 magazines, 60 booking units of daily newspapers, 10 TV channels, radio as well as online audio, posters and cinema, 783 websites, 390 mobile offers and 198 apps.

**People**
b4p captures various demographic data and discloses what often is hidden behind hard facts: interests, motivation, attitudes and needs.
Methodology
What is the origin of the data?
Multi-Source-Survey

Survey
CAPI-CASI interviews of 30,105 respondents. Selection of respondents by random-address-selection. Rolling field model.

Self-completion questionnaire
The same respondents complete a detailed market questionnaire. CAPI-CASI interviews and self-completion questionnaires are brought together.

Technical tracking
Within the GXL panel provided by the GfK. Measurement of stationary internet use in 9,586 cases, thereof additional 3,561 cases of mobile tracking.

Adjustment of media
Where possible values of media coverage are adjusted to the value determining studies of the agma and the AGOF ddf.
Multi-Source Approach

b4p provides outstanding quality

Survey
(Face-to-Face Inhome)
n = 30,105

CAPI/CASI
(Computer Assisted Personal Interview)
(Computer Assisted Self Interview)

Demographic characteristics, interest in information, media usage

SAB
(self-completion questionnaire)

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

ONLINE PARALLEL-WAVE
n = 9,586

Online-questionnaire

Important questions of the CAPI/CASI, particularly media usage and socio-demographics

Technical measurement

Tracking of stationary and mobile media use

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## Methodology profile

**First-class quality standards**

<table>
<thead>
<tr>
<th></th>
<th>SAB &amp; CAPI/CASI</th>
<th>Online parallel wave</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Universe</strong></td>
<td>German-speaking resident population over 14 years of age in Germany (70.45 Mio.)</td>
<td>German-speaking resident population over 14 years of age in Germany (70.45 Mio.)</td>
</tr>
<tr>
<td><strong>Sampling</strong></td>
<td>ADM sampling, random address selection</td>
<td>Stationary and mobile online user</td>
</tr>
<tr>
<td><strong>Number of cases</strong></td>
<td>30,105 cases</td>
<td>Stationary user: 9,586 cases</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mobile website user: 3,561 cases</td>
</tr>
<tr>
<td></td>
<td></td>
<td>App user: 4,564 cases</td>
</tr>
<tr>
<td><strong>Institutes</strong></td>
<td>GfK MCR, IFAK, Ipsos</td>
<td>GfK SE (GfK Crossmedia Link Panel)</td>
</tr>
<tr>
<td><strong>Survey Period</strong></td>
<td>September 2016 until April 2017</td>
<td>January 2017 until March 2017</td>
</tr>
<tr>
<td></td>
<td>September 2017 until April 2018</td>
<td>January 2018 until March 2018</td>
</tr>
<tr>
<td><strong>Field model</strong></td>
<td>Approx. 15,000 cases/year</td>
<td>Rolling system: consolidation of two years</td>
</tr>
<tr>
<td></td>
<td>Rolling system: consolidation of two years</td>
<td>Outcomes into one edition</td>
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<tr>
<td></td>
<td>Outcomes into one edition</td>
<td></td>
</tr>
</tbody>
</table>
People
People
Demography

Respondent
- Age
- Sex
- Nationality
- Religious affiliation
- Marital status
- BMI, 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

Life situation
- Stage of life
- Life cycles

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

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

Mobility
- Away from home
- Use of transportation
- Public transport
- Commuting
Psychographic Characteristics
What is behind the demographics?

Aspects of life
Large circle of friends
Professional success
Sound environment
Individuality
Fun and joy

Statements on change
I am about to change my job
I will become self-employed
I will marry
I will move house

Spheres of life
Luxury makes life better
I try to stay fit by doing sports regularly
I gladly take on responsibility

Leisure
Visiting stadium association football matches
Engaging with animals
Cycling, mountain biking
Reading magazines
Psychography
What is behind the demographics?

In addition to the individual characteristics a number of compressed target group models is provided such as typologies, personality factors, construct types, social class characteristics, stage of life and social milieus. Thus a number of familiar as well as innovative approaches is available for market analysis and target group planning.

Psychographic Target Groups

- SIGMA-Milieus®
- Sinus-Milieus®
- Limbic®-Types
- The Lohas (Lifestyle of Health and Sustainability)
- The New Alphas
- Personality Factors
- Interest Horizons
- Big Five
Personality factors

Personal goals and motivations

- The personality factors are based on the respondents assessment regarding their personal goals and motivations. Applying a factor analysis the statements were compressed to six evaluable factors (graphic on the right). For each person an individual point value of the factor loadings and the related statements was calculated.

- An individual point value was calculated per personality factor and person from the factor results of the pertaining statement. The distribution per factor resulting from values, was divided into four categories as far as possible (1 very high, 2 high, 3 medium, 4 low).

- The personality factors were set up for the first time in b4p 2013 and since then updated annually till b4p 2017. A fundamental revision and recalculation was made in b4p 2018, which will be updated in coming b4p publications.
The BIG FIVE Model of personality
A model to describe personality

- The Big Five or the five-factor model is a model for personality traits. Accordingly **five main dimensions of the personality** exist and every person can be classified to this dimensions (right graphic).

- The Big Five model has been proven by various studies and is nowadays considered internationally as the **universal standard model** for personality research. Starting point of the model is the psycho-lexical approach of Allport & Odbert\(^1\).

- In order to apply the lengthy Big Five instrument in large scale surveys, it has been reduced into a short scale, called BFI-10, assessing the five dimensions with only ten items.\(^2\) However, the correlations between personality traits and demographics that were identified in other surveys were also corroborated in best for planning.

- Thus, b4p is enriched by a further **dimension of target group description**, which opens up new possibilities for planning and marketing.

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Markets
Markets in b4p
b4p represents all markets relevant for advertising

Consumer Goods
- Food & Beverage
- Beauty
- Health

Services
- Finance & Insurance
- Retail
- Traveling

Durable Goods
- Home & Living
- Fashion
- Consumer Electronics
- Car & Mobility

<table>
<thead>
<tr>
<th>Frequency of usage</th>
<th>Available/concluded in household</th>
<th>Available in household/personal ownership</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase</td>
<td>Purchase intention</td>
<td>Purchase intention</td>
</tr>
<tr>
<td>Usage of brands</td>
<td>Provider preference</td>
<td>Brand ownership</td>
</tr>
<tr>
<td></td>
<td>Place of purchase</td>
<td></td>
</tr>
</tbody>
</table>
Features
Consumer behavior in Germany

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

Interest in Product Information
Decorative cosmetics
Bags, travel bags, leather goods
Apps/applications for mobile phones
Furniture and furnishing
Short trips

Purchasing Decisions
Tablets
Pay TV subscription
Second car in the household
Planning/booking holiday trips
Financial investment

Role as Advisor
Consumer electronics
Fashion
Cosmetics
Food

Brand/Price Awareness
Non-alcoholic beverages
Confectionery, snack items
Perfumes/scents/eau de toilette/aftershave
Mobile phones, smartphones
Household appliances

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Illustration of brands
Annual update of brands

New brands for…
• Mobile phones/Smartphones
• Streaming providers
• Jewelry
• Fashion
• Shoes
• Electrical appliances
• Kitchen appliances
• Travel operators
• Painkiller
• Mineral-/Table water

… and many more
Market-Related Target Group Models

Who is the consumer? b4p provide answers.
All exclusively created typologies for b4p were developed by the b4p research community of the GIK, partly with support of other service providers.

The industry typologies were first developed in b4p 2013 and updated annually until b4p 2017. A fundamental revision and recalculation was made in b4p 2018, which will be updated in coming b4p publications.
Media
**Media in b4p 2018**

*b4p presents the most important media channels*

b4p presents the most important media channels based on the model of the “Arbeitsgemeinschaft Media-Analyse” (AGMA) and “Arbeitsgemeinschaft Online Forschung” (AGOF) study. The diversity enables the calculation of cross media brand coverage and in order to that proceeding insights and detailed planning possibilities.

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**Print**
- 185 Magazines, Reader circle
- 60 Booking units of daily newspapers
- Advertising papers

**Online**
- 783 Websites, 732 Booking units
- 390 Mobile Sites/MEWs, 587 Mobile booking units
- 198 Apps
- 165 End-to-end digital offers

**More**
- 10 TV stations
- Radio and Online-Audio
- Posters
- Cinema

New
Qualitative Media-Insights
Media use, advertising, magazines and newspapers

Media in general
Media use:
- I use media primarily to obtain information
- It is important to have reliable sources of information
- I use media primary to relax and unwind
- I try to stay up-to-date by checking the news several times per day
- …

Advertisement
Attitudes towards ads:
Ads in … (magazines, newspapers, TV etc.)
- …are informative
- …encourage to buy
- …are credible
- …are entertaining
- …

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 and newspapers
Thematic interests:
- Garden and plants
- Food, cooking, recipes
- Partnership
- Stars, celebrities
- …

Reading venues:
- At home
- When the waiting rooms
- At the hairdresser’s
- At work/in the office
- …
## Qualitative Media-Insights
### Internet use, Social Media and Second Screen

### TV

#### Popular TV Genres:
- News
- Entertainment shows
- Quiz shows
- German crime series/thriller
- Football
- Formula 1
- Reality-Shows
- Action
- Daily Soaps
- Cooking shows
- …

### Internet & Social Media

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

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

---

68 Items

16 Items

13 Items

5 Items
The **media user typology** is based on a cluster analysis on active media usage and different preferences. In a two-stage process, the characteristics were firstly subjected to several factor analyses; in the second step, a cluster analysis was calculated with the factors (Kohonen typology).

The media user typology was first developed in b4p 2013 and updated annually until b4p 2017. A fundamental revision and recalculation was made in b4p 2018, which will be updated in coming b4p publications.
Digital networker and entertainment-oriented idler (potential: 23%)

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 they enjoy the fast communication. Mobile networkers are interested in topics like music and film streaming, but also computer games, shopping, fashion and environmental topics.

Offline entertainment-oriented (potential: 14%)

This is the oldest (over the age of 50), mainly female type with low education and low income who favors 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.

Information elite (potential: 22%)

This highly educated, high-income type, mainly male and middle aged 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.

Offline information scanner (potential: 13%)

Regional daily newspapers, magazines, program guides – print is the favorite medium of this mainly male type. Often already in the retirement offline information oriented - mainly over the age of 50 with a normal education and income - are interested in topics like sports, politics, cars as well as garden. They are not very interested in digital offers and often watching TV.
Digital information scanner (potential: 11%)
Digital info-scanners are between the age of 20 and 49, high educated and having a professional carrier. This type is permanently in contact with some type of media and enjoys the timely and spatial independence of media usage. Varied interested, this type likes lifestyle as well as economic topics. They use social networks keenly and often in job-related context as well.

Culture and family-oriented selective user (potential: 8%)
This mainly female, very well educated type with a big high income uses magazines and daily newspapers disproportionate. They are reserved towards the internet and especially interested in reading about health, garden, food creative design and family topics. Even if the children moved out for this target group family is very important.

Media grouch (potential: 8%)
The poorly educated and low income media grouch is neither fond of classical nor digital media types. In his target group midday magazines, folk music shows, watched on TV, are popular. Especially people over the age of 60 but also under the age of 20 are mostly represented in this type.
Media User Groups and Media Compass
Compression of variables for better planning

The construct of media user groups and media compass

• The media user groups provide an initial categorization of the users of different forms of media (e.g. newspapers, magazines, posters, TV, radio and internet, mobile and apps)

• The media compass is a tool that illustrates in which media categories or subgroups certain target groups are concentrated in order to effectively support strategic planning. The tool should be as simple as possible and provide the relevant information in a single value, yet still supply the required depth. The media compass now provides this type of information.

• Both constructs, media user groups and media compass, are based on the frequency of contacts with each media type or their subtypes (Basis: advertising vehicle contact).

• The media user groups are slightly rougher divided in 4 groups and partly non-users. There is no differentiation in subgroups. They are a first note whether a target group uses a media type (or media mix) often or not and any combination is possible e.g. TV++/Magazines++/Online++ etc.

• The media compass also says something about the under or over proportional usage of media types, but in a single value. The analysis allows differentiation by subgroups though due to its construct combinations are not possible – each value score stands for itself. Crucial for the target group analysis is the relative difference between target group and the reference group (index).
Implementation Media User Groups

Media user groups provide a rough categorization of the media affinity of certain target groups. They are divided into four groups representing their use intensity. Thus it can be analyzed whether the target group is under or over represented within a media type.

The frequency of contact with a media 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.)
The Media Compass provides quick insights
The media compass is a tool to support strategic planning. It provides relevant information for media types and their subcategories in a single measured value. All media types are equally treated.

Construction method & interpretation:
For each survey participant, the likelihood of contact with each media type or subgroup is firstly added in groups. All participants with contact to the media type are sorted in an ascending order by its contact sum and additionally divided in 100 equal parts. The hundredth of all survey participants with the least contact individually receives the compass value 1, the next hundredth of all survey participants with the second-lowest category contact receives the value 2 etc. This means less contact of a participant with a media type leads to a low score. High contact of a participant with a media type leads to a high score (The hundredth of all survey participants with the most contact individually receives the compass value 100). The average score of a target group is the ‘compass value’ (shown in the %-column). Comparing the ‘compass value’ of the reference and target group by an index, shows the relative affinity of the target group towards a media type or media subtype. The higher the index, the more often the media type is used.

Attention: The ‘compass value’ must not be used as a percentage of media usage, as it is a constructed mean value.

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**Insights Media Use**

*Example media compass for “extensive travelers” (overview and in detail)*

**Source:** best for planning 2017 I (age of 14 +) ZG-potential: 5.7 %, 1,711 cases, 3.98 Mio.
The target group of extensive travelers is disproportional large within the group of online magazines and daily newspaper users (Index>120). They have often contact to this media channels. In detail regarding the magazines extensive travelers prefer political magazines, every two week / monthly women magazines as well as magazines about science, technology, economy, culture, environment, PC, entertainment technology and lifestyle.
Questions?

Gesellschaft für integrierte Kommunikationsforschung mbH & Co. KG

Herzog-Wilhelm-Str. 1
80331 München
Tel. +49 89 716 772 020
E-Mail. info@gik.media

www.gik.media
Kontakt

Gesellschaft für integrierte Kommunikationsforschung mbH & Co. KG

Herzog-Wilhelm-Str. 1
80331 München
Tel. 089 / 716 772 020
E-Mail: info@gik.media
www.gik.media

For methodic questions

Axel Springer SE
Patricia Dähn
patricia.daehn[at]axelspringer.de

Funke Mediengruppe
Patricia Dähn
patricia.daehn[at]axelspringer.de

Bauer Media Group
Andrea Treffenstädt
andrea.treffenstaedt[at]bauermedia.com

Gruner + Jahr
Dr. Michael Hallemann
hallemann.michael[at]guj.de

Hubert Burda Media
Tanja Seiter
tanja.seiter[at]burda.com

Bauer Media Group
Andrea Treffenstädt
andrea.treffenstaedt[at]bauermedia.com

Gruner + Jahr
Dr. Michael Hallemann
hallemann.michael[at]guj.de

Hubert Burda Media
Tanja Seiter
tanja.seiter[at]burda.com
Kontakt

Gesellschaft für integrierte Kommunikationsforschung mbH & Co. KG
Herzog-Wilhelm-Str. 1
80331 München
Tel. 089 / 716 772 020
E-Mail. info@gik.media
www.gik.media

Bauer Media Group
Julian Wörner
040 / 301 910 99
julian.woerner[at]bauermedia.com

Axel Springer SE
Oliver Perzborn
030 / 259 176 649
oliver.perzborn[at]axelspringer.de

Funke Mediengruppe
Katja Mazurek
0201 / 804 886 6
k.mazurek[at]funkemedien.de

Gruner + Jahr
Carola Holtermann
040 / 328 714 1
holtermann.carola_fr[at]guj.de

Hubert Burda Media
Christiane Blana
089 / 925 029 54
christiane.blana[at]burda.com

Trade press
Cross Media Brand Reach

Representation of cross media brand reaches
All published components of media brand, 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 date:

- 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

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.
Evaluate Overlaps of Media Channels and Total Reach with b4p

Net reach Bild: 28.28 million
(time horizon: week)

Overlaps
(on weekly basis)

- BILD Print / BILD.de (Internet)* 1.27
- BILD Print / BILD (Mobile + App)* 1.74
- BILD.de (Internet) / BILD (Mobile + App)* 1.13
- BILD Print / BILD.de (Internet) / BILD (Mobile + App) 0.67

Source: b4p 2018 II; BILD Print: LpA 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
*user of two offers, not the third media channel
Evaluate Overlaps of Media Channels and Total Reach with b4p

**Net reach stern: 10.89 million**
(time horizon: week)

**Overlapping**
(on weekly basis)

<table>
<thead>
<tr>
<th>Overlapping</th>
<th>in Mio.</th>
</tr>
</thead>
<tbody>
<tr>
<td>stern (Print) / stern.de (Internet)*</td>
<td>0.17</td>
</tr>
<tr>
<td>stern (Print) / STERN (Mobile + App)*</td>
<td>0.39</td>
</tr>
<tr>
<td>stern.de (Internet) / STERN (Mobile + App)*</td>
<td>0.26</td>
</tr>
<tr>
<td>stern (Print) / stern.de (Internet) / STERN (Mobile + App)</td>
<td>0.05</td>
</tr>
</tbody>
</table>

Source: b4p 2018 II; stern Print: LpA stern
stern.de: stationary online usage (Big Screen)
STERN (Mobile + App): mobile usage stern.de/MEW as well as via apps
*user of two offers, not the third media channel
Evaluate Overlaps of Media Channels and Total Reach with b4p

**Net reach FOCUS: 13.78 million**
(time horizon: week)

**Overlapping**
(on weekly basis)

- FOCUS (Print) / FOCUS Online (Internet)*: 0.35 Mio.
- FOCUS (Print) / FOCUS (Mobile + App)*: 0.41 Mio.
- FOCUS Online (Internet) / FOCUS (Mobile + App)*: 1.07 Mio.
- FOCUS (Print) / FOCUS Online (Internet) / FOCUS (Mobile + App): 0.13 Mio.

Source: b4p 2018 II; FOCUS Print: LpA
FOCUS Online: stationary online usage (Big Screen)
FOCUS (Mobile + App): mobile usage/MEW as well as via Apps
*user of two offers, not the third media channel
Evaluate Overlaps of Media Channels and Total Reach with b4p

Net reach TV Movie: 9.66 Mio.
(Time horizon: month)

Overlapping
(on monthly basis)

- TV Movie (Print) / tvmovie.de (Internet)*: 0.38 in Mio.
- TV Movie (Print) / TV Movie (Mobile + App)*: 0.19 in Mio.
- tvmovie.de (Internet) / TV Movie (Mobile + App)*: 0.22 in Mio.
- TV Movie (Print) / tvmovie.de (Internet) / TV Movie (Mobile + App): 0.06 in Mio.

Source: b4p 2018 II; TV Movie Print: LpA TV Movie (2x)
tvmovie.de: stationary online usage (Big Screen)
TV Movie (Mobile + App): mobile usage tvmovie.de/MEW as well as via app
*user of two offers, not the third media channel
Evaluate Overlaps of Media Channels and Total Reach with b4p

Cross media combination Funke NRW (Kombi per day): 2,237 thousand
(time horizon: day)

Overlapping
(on daily basis)

- Funke Medien NRW 850 (Print) /
  Funke Medien NRW OMS (Internet)* 23
- Funke Medien NRW 850 (Print) /
  Funke Medien NRW OMS (Mobile)* 32
- Funke Medien NRW OMS (Internet) /
  Funke Medien NRW OMS (Mobile)* 6
- Funke Medien NRW 850 (Print) /
  Funke Medien NRW OMS (Internet) /
  Funke Medien NRW OMS (Mobile) 1

Quelle: b4p 2018 II; Funke Medien NRW (Print): LpA 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
*user of two offers, not the third media channel
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
  Axel-Springer-Platz 1, 20350 Hamburg
  Telephone: 040 34 72 25 07
  Mail: mds-service@axelspringer.de

- 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 GmbH
  Höppnerweg 1, 23669 Timmendorfer Strand
  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 analyze market data and a monitoring tool for content analyses and resonance data.
- With its easy intuitive usage via Drag & Drop, Instant Results and great performance, the software is appealing for planning experts as well as occasional users.

- Contact:
  IMMEDIATE GmbH
  Marktforschungsdienstleistungen & Software
  Kleiner Ort 1, 28357 Bremen
  Telephone: 0421 20 71 500
  Mail: info@immediate.de
Next steps
Continuous up-date of reach

**b4p 2018 I**
- Oct 2018
  - Adaption to...
    - Print: ma 2018 Press II/AWA 2018
    - Online: AGOF ddf 2018 Q1
  - Fusion on the basis of...
    - TV: ma 2017 Intermedia PLuS
    - Radio/Audio: ma 2018 Audio II
    - Poster: ma 2018 Poster

**b4p 2018 II**
- Dec 2018
  - Fusion on the basis of...
    - TV: ma 2018 Intermedia PLuS
    - Radio/Audio: ma 2018 Audio II Update
    - Poster: ma 2018 Poster

**b4p 2018 III**
- Mar 2019
  - Anpassung an...
    - Print: ma 2019 Presse I
    - Online: AGOF ddf 2018 Q4

**b4p 2019**
- Sep 2019
  - Adaption to...
    - Print: ma 2019 Presse II / AWA 2019
    - AGOF ddf 2019 Q1
  - Fusion on the basis of...
    - TV: ma 2018 Intermedia PLuS
    - Radio/Audio: ma 2019 Audio II
    - Poster: ma 2018 Poster

For further information in English please visit: https://www.gik.media/downloads/
For data analysis and media planning in English please contact our software partners mds or mediMach.