ONLINE ADVERTISING MEDIA IN A MARKET AND MULTIMEDIA STUDY: MEASUREMENT METHODS AND FINDINGS ON THE INTERACTION BETWEEN PRINT AND ONLINE CONSUMPTION

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Introduction

With the emergence of online media, a new media genre also comes into being. The rapid spread of the online market has already turned it into a mass medium. In the first half of 1999, 16.9 percent of the German population age 14 to 64 used online services or the Internet. This new mass medium also makes for an interesting advertising medium. By the year 2000, Germany is expected to become the most important online market for advertising in Europe. Online advertising media are expected to increase their turnover from DM 150 million today (1999) to DM 450 million by 2002. Nevertheless, online media's share of advertising still remains small. Online advertising is estimated to make up a little less than 1 percent of the total advertising turnover in 2002.[1]

Current data on Internet consumption in Germany is either based on site centric measurements or on user centric measurements. Site centric measurements evaluate visits to a site, the logfile data. An example is IVW data (Informationsgemeinschaft für die Verbreitung von Werbeträgern) on visits and page impressions. This data only refers to contact numbers which hardly allows us to draw any conclusions about the size and composition of online audiences. User centric studies, in comparison, are based on samples of Internet users. They can be organized as a technical measurement of users' computers or as surveys. The validity of the findings, however, is crucially dependent on the quality of the sample. Data on Internet consumption which is ascertained by technical measurements of computers, belonging to a representative cross section of Internet users, are presently not available in Germany. Online surveys that are subject to a sample of self-selected internet users are totally unsatisfactory. Online users who are willing to take part in online surveys differ greatly—with respect to their online consumption—to those who would not take part. These willing users are much more avid online users which consequently leads to survey findings that systematically provide a distorted picture of reality (Tables 1 and 2).

Information about online users is also ascertained by the various large media and market studies. These studies are based on representative samples of the population and are conducted using large samples which can be employed as undistorted screening for the subgroups of online users. The *Allensbach Media and Market Analysis* (AWA) has been observing the media consumption of online users since 1994.[2] Because it was impossible to expand the AWA questionnaire to accommodate the measurement of online users, the Allensbach Institute initiated a new media market analysis specializing in the computer and telecommunications markets, the *Allensbach Computer and Telecommunications Analysis* (ACTA).

The Conception of the ACTA

In the second half of the 1990s, the computer and telecommunications markets were developing very rapidly. When the data from the first ACTA was published in 1997, the situation on the computer and telecommunications markets for products and services differed quantitatively and qualitatively from the situation at the onset of the 1990s. Modern communication technology is evolving from a special interest product into a product for the masses. At present, the market is expanding particularly in those segments of the population, where people are more interested in the new possibilities of modern communication technologies, than they are in the technologies themselves. The ACTA has been based—from the very onset—on a representative sample of the German population age 14 to 54 (1997) and 14 to 64 (since 1998). If we had limited this sample, for example, to a group of people who are interested in computers, the evolution into a mass market would have gone undetected. 10,132 face-to-face interviews, representative of the German population age 14 to 64 (50.93 million), were conducted for the 1999 ACTA between January and August.

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[1] Prognoses from EMS and Prognos in *Mediaperspektiven* 10/98.

[2] The AWA is a market and media study that has been published annually since 1959. New trends are detected very early, even if their potential is initially still quite limited. The AWA combines numerous demographic, psychographic and product-related target group characteristics with a very broad range of media (magazines, newspapers, television, radio, cinema, outdoor advertising). It is based on about 20,000 face-to-face interviews representative of the German population age 14 and over (63.7 million).

As a market study, the ACTA includes:

- a comprehensive overview of the entire market of private as well as professional users of modern telecommunication technologies
- the measurement of all important areas of technology ranging from computers, offline as well as online consumption, to telephone and television
- the identification of relevant target groups: Here the ACTA does not ascertain the market potential via the interest in concrete hardware or software, but rather via demand structures of the population, the interest in possible applications and individual estimated use of the new technologies.

As a media study, the ACTA measures coverage and user composition of advertising media from all the important media genres, which include the print media (magazines, daily and weekly newspapers), television broadcasters and online media. Print media and television coverage is adjusted to the findings of the AWA which is published shortly before the ACTA. Online media measurement is user specific—analogous to the measurements in other media genres. The probability of exposure is calculated for online media as well. In the media planning of specific target groups, all media genres can be evaluated in parallel using the popular kinds of planing software. Media plans can be drawn up and analyzed which combine, for example, print media with online media.

The Measurement of Online Media in the ACTA

The measurement model for online media works with two filtering levels, as shown in Diagram 1. In the first level the ACTA filters out online users which then also serves as a filter for other questions concerning online issues. Only respondents who already use online services or the Internet receive questions regarding the use of specific online media. Masthead cards showing the online service or website logos are used as a measurement aid. The logos of the various websites are shown printed within a frame resembling a computer screen. The webpage address is printed next to the logo on each card (Diagram 2). The second filter now determines the broadest readership for each website and the frequency of consumption as well—without any temporal restrictions. The question wording and response categories are shown in Diagram 3. The respondent places the cards showing the logos on the sheet containing the response categories. The concluding recency question is asked for all online media that passed through the filter ascertaining the broadest readership. For the analysis, we can differentiate—with the help of the recency scale—between respondents who last viewed a particular website: yesterday, within the last 7 days and within the last month. Since the number of respondents who "last viewed a particular website yesterday" only allow for an analysis of the largest websites, the findings are given for the last two contact definitions. The probability of exposure for each online advertising medium is calculated for all respondents belonging to the broadest readership. The external set of data includes p-values for "readers per week."

Methodological Notes on the Measurement of Online Media

Websites are not necessarily clearly defined and self-contained. The architecture of the Net and the numerous links make it possible for a user to roam through the Internet, surfing from one site to the next with a click of the mouse. Therefore, a survey can only take websites into consideration that are uniform in design—which clearly differentiates them in this way from other websites. And this applies to all websites included in the ACTA. The majority of the websites are online versions of well-known magazines, large online catalogs and search engines. These websites, which in many cases are advertised in other media, are important landmarks for Internet users and will thus be indicated in the interview.

Website content does not necessarily have to be consumed online. This content can be passed on—in oral form or in the form of a printout—to persons not belonging to the group of online users. The findings to a question included in the ACTA indicate that this happens quite often (Table 3). Two thirds of the potential users receive information from the Internet before becoming online users themselves. Even those respondents who are presently non-users, with no plans to use the Internet in the future, are not totally cut off from online information. Twenty percent of these respondents receive information from the Internet. Printouts are a very popular form for passing on Internet contents. Online users, in particular, are typically readers of printouts of Internet contents which they did not get from the Net themselves. This happens quite often in professional environments where the new communication technologies are heavily used (Table 4). Issues resulting from this kind of behavior have received little attention up to now. We are also not aware of any studies concerning the question of how respondents report their offline use of Internet content in the interview.

Empirical Findings from the AWA and ACTA

The second part of this paper analyses the size and composition of online audiences. Focus is placed on media consumption patterns of online users, in particular the interaction between online media consumption and print media consumption.

The Development of the Coverage of the New Medium

In spring/summer 1999, 16.9 percent of the German population age 14 to 64 used online services or the Internet (Table 5). This implies that the total coverage of this new medium more than quadrupled in less than five years. Our first measurement stems from fall 1994, which measured exclusively the online service of the German Telekom, BTX. At that time, 4.2 percent of the German population age 14 to 64 were online users. Currently the percentage of online users is rapidly on the rise. After a slow start, the growth rate has clearly picked up speed since the second half of 1996. The number of online users rose 43 percent between the first half of 1998 and the first half of 1999.

Compositional Focal Points of Online Users

A brief sociodemographic characterization (Table 6) of today's online users reveals a more-or-less male-dominated target group (Index 132 for online users age 14 to 64 in comparison to total respondents age 14 to 64), the majority of which are between the ages of 20 and 39 (Index 139). A little less than one half have a higher education (Index 224) and among these a strikingly large number are university students (Index 210). Their social and economic situation is above-average. One out of two can be classified as belonging to one of the two upper levels of our status scale (Index 201), close to one third have a household income of DM 6,000 and over (Index 173). A portrait which also takes into consideration the psychographic characteristics can give us more details, for example, a portrait that takes into consideration the needs, interest patterns, and motives for usage. This portrait clearly demonstrates how drastically the user profile has changed parallel to the rapid expansion of the new media. An important characteristic of the 1999 online users is that they have a broad spectrum of interests. Their interests in business, politics or science and research are clearly above-average; continuing education is also an important subject for many online users. However factual information and career is just one side of the coin. At the same time, online users are also very interested in the arts, the cultural scene, movies, CDs and photography. Many online users attest to having a good nose for new developments. They are very open to new technologies and belong to the group of early adopters.

Nevertheless respondents who are especially interested in and experienced with computers—the IT experts (Table 7)—still make up the majority. But in relation to the total German population, the dominance of pronounced IT experts is slowly declining. This trend will definitely pick up speed in the future, because IT experts make up the minority of potential online users, who plan on using the Internet in the future. Great curiosity of the new medium distinguishes many online users who have appeared on the scene in the past two years. Today‘s online users also differ from earlier online users in their approach to new technologies. The majority of online users still would like to know exactly how a certain technology or device functions yet the counter position—”the main thing is that it works”—has been winning a lot of ground in the past few years.

These important changes are only partly reflected in the sociodemographic composition of the respondents (Table 7). The share of female online users has remained at about one third for the last two years. This, however, will undoubtedly increase greatly over the medium term. The percentage of women who plan on going online has risen by leaps and bounds from 33.3 percent in 1997 (ACTA‘97 was based on respondents age 14 to 54) to 39.6 percent in 1998 (ACTA ‘98 and ‘99 were based on respondents age 14 to 64) and 47.0 percent now in 1999. In the past two years, there has been a clear drop in the percentage of online users who were employed and, parallel to this, there was an increase in the percentage of schoolchildren and university students. This is primarily due to the fact that in the universities—and now also in the schools—students can use the Internet free of charge. Nevertheless online use is still a characteristic of the upper social classes. The expansion of potential—which took place within the past few years—has not yet led to a distinct shift in social standing. The conquest of broader classes of the population still lies ahead of this new medium.

Online Users Are Also Media Freaks

Since the AWA is a multimedia study, it allows for the combined analysis of the media behavior of particular target groups. Here our analysis is based on two variables which we call the media horizon and media dosage. The magazine horizon, for example, groups respondents according to the number of titles they at least read occasionally. In this way, respondents who read a minimum of 38 magazines out of the 242 titles included in the 1999 AWA are classified as belonging to the group of respondents who have a ”very wide magazine horizon.” According to this principle, we also have a daily newspaper horizon and television horizon. The dosage has nothing to do with the number of titles or stations that respondents take into account, but rather contacts are added up that respondents have had with the respective genre within a certain period of time.

Table 8 illustrates that online users are far above-average in their mass media consumption. It doesn‘t matter whether we are dealing with magazines, daily newspapers or television stations, online users consume more individual media than the average population does. Interestingly enough, online users' affinity to the print media is very pronounced. This does not only apply for magazines and newspapers, online users are also especially avid book readers. Furthermore, the orientation of online users towards the print media has increased in the past years; a large percentage of those online users who started using online services in 1997 or 1998 are vigorous readers. At the same time, they use the entire bandwidth of German free TV stations, yet with below-average intensity: the number of TV contacts of online users remained below-average up to 1998 (Table 9). The composition of online users is presently undergoing change in this point as well. In 1999 the group of online users with above-average amount of television contacts augmented. This development is certain to continue in the future. There is also an above-average percentage of persons among the potential online users with high television consumption.

Online Consumption and Its Interaction with Other Media

So far online users can be definitely described as being media pioneers—their consumption of mass media is above-average in all genres. They appear to use online media in addition to and largely independent of the classic media. The decisive factor is the additional possibilities of the new media—its individual advantages for this particularly interested and active group of people. Parallel to the broad diffusion process of the new medium the competition for the tight time and financial budgets will increase between the old and new media. It is already apparent today that more time will be spent online in the future. Today a good third of all online users (35.4 percent) spend time on the Net daily or almost daily. Only two years ago a mere quarter (26.1 percent) said they were online daily (Table 10). Time spent online on an average day rose as well. There is hardly an online user to be found who plans on cutting back on his/her online consumption, yet 70.8 percent indicate that their use of online services will increase. At the same time users give online services and the Internet increasingly better ratings. 69.2 percent of Internet users are all in all satisfied, only 12.4 percent (1997: 19.0 percent) say that they are not very satisfied. Of course this is partly due to the fact that less and less users complain about the slow transfer of data and indicate that it is easier to find your way through the Internet today than it was a few years ago (Table 11).

Websites of the Classic Print Media

Many magazines and newspapers have in the meantime gone online. They complement their print publications with electronic versions which have unique copy, additional features and are meant to reach new groups of readers. Twelve of these magazine or newspaper online - offline combinations are included in the ACTA '98 and ACTA '99, thus allowing for the analysis of the changes which have taken place within these two years. The special correlations between the consumption as a print medium and online medium can also be analyzed in detail here.

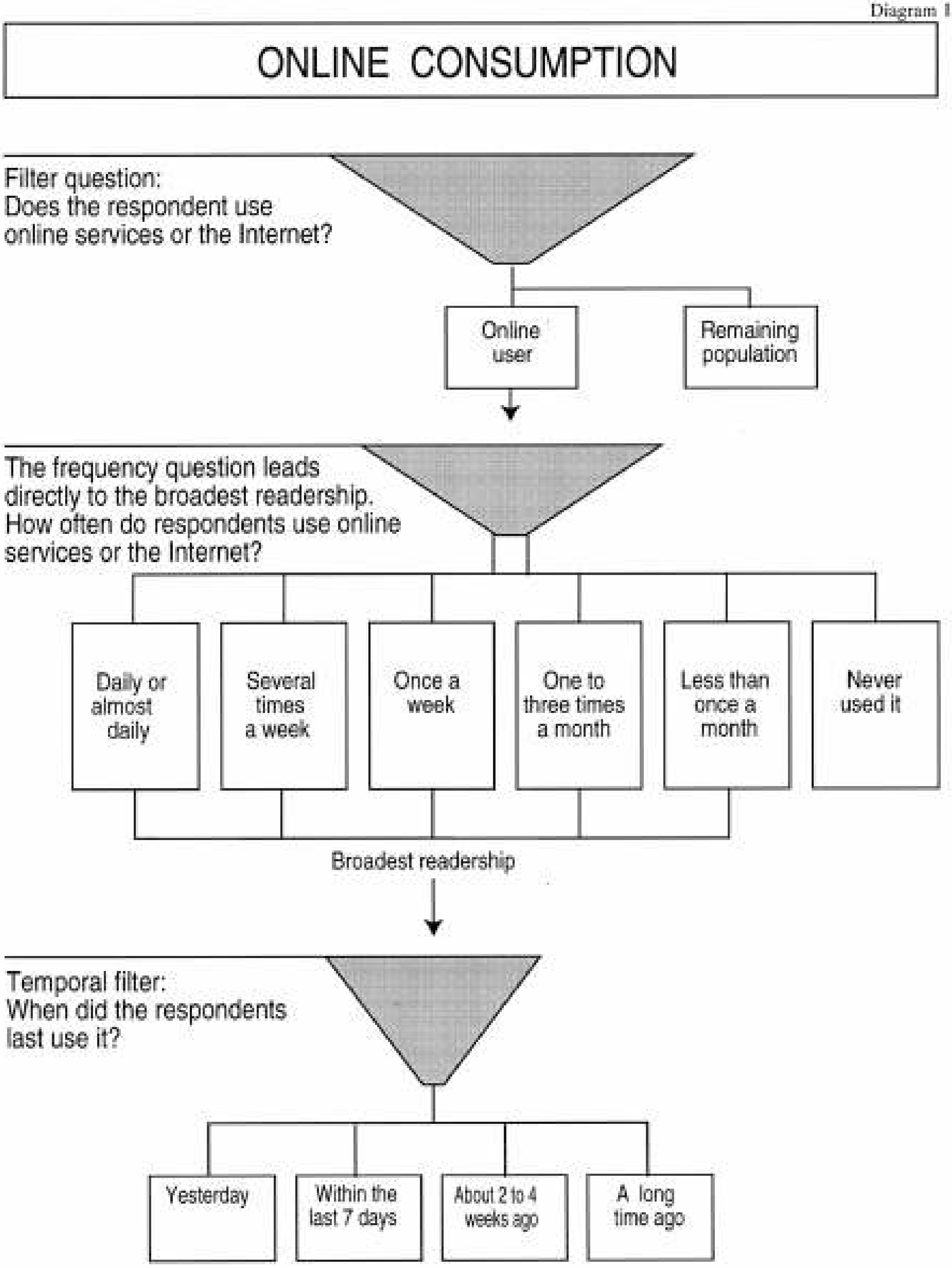
Readers of online publications are usually readers of the print versions as well (Table 12). For the average of the 12 online - offline combinations, 75 percent of the online readers also read the print version. The individual values range from 63.6 percent attained by the business magazine for private investors, *DM*, to 88.7 percent for the news magazine, *Der Spiegel*. It is clearly evident that the supplemental online publications profit from the loyalty and images built up by the print versions over the years and decades. Electronic versions only recruit, on average, one fourth of their readers from the group of people who do not belong to the readership of the corresponding print versions. There were no significant changes in this dependency between online and offline titles between 1998 and 1999.

Nevertheless, online versions of magazines and newspapers have not yet exhausted their latent potential. This latent potential includes all readers who are already online users and thus would be able to read the electronic versions. Even in the most favorable case of the PC magazine *CHIP*, the online version is only read by 36 percent of its readers who also belong to the group of online users (Table 13). For the average of the 12 online - offline combinations, 24.6 percent of their latent potential has been exhausted. Individual values range from 13.0 percent attained by the online version of the *Bildzeitung* to 36.0 percent for the electronic version of *CHIP*, which was just mentioned. Striking is that the percentages attained in 1999 have generally decreased from those in 1998. None of the online publications have been able to maintain their relative position from 1998 within the increased latent potential.

Highly motivated and interested media consumers can be mutually attracted to online and offline publications. This is illustrated in Table 14 for the news magazine, *Focus* and its electronic counterpart, *Focus Online*. *Focus* readers who are at the same time readers of *Focus Online* belong to the group of exceptionally regular readers. They read the magazine much more often then those readers who do not read the online version.

This example of a printed version of a news magazine and its online counterpart makes for an excellent illustration of the new division of labor between traditional and new media. Information which can be selectively obtained will be increasingly employed in the online media, whereas printed publications will maintain their significance as a medium with extensive background information, and because of their agenda-setting function, function of calling attention to new developments and as a provider of keywords for the selective search for information in the Internet. In particular, this means that we can only make an incompletely picture of the interaction between the rapidly evolving new media and the classic media, above all, within target groups and regarding the development over time, with the data available in Germany today. Comprehensive intermedia panel research would be very important which, for example, would analyze the diffusion of Internet consumption and its effects on the consumption of other media in the form of a continuous, tracking study of the same respondents over a longer period of time.

Diagram 1

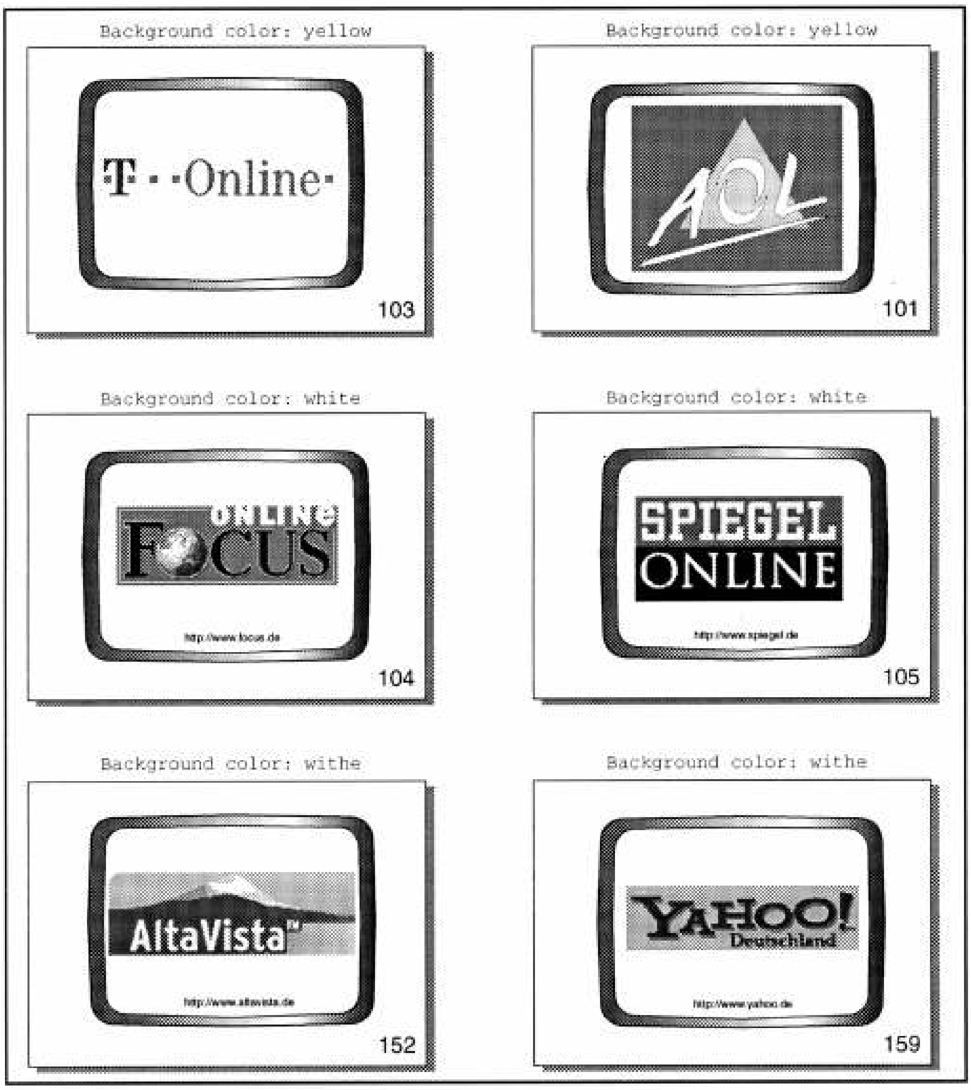

ONLINE CONSUMPTION
Filter question:
Does the respondent use
online services or the Internet?
Online user
Remaining population
The frequency question leads
directly to the broadest readership.
How often do respondents use online
services or the Internet?
Daily or almost daily
Several times a week
Once a week
One to three times a month
Less than once a month
Never used it
Broadest readership
Temporal filter:
When did the respondents
last use it?
Yesterday
Within the last 7 days
About 2 to 4 weeks ago
A long time ago

IN ACTA INTERVIEWS MASTHEAD CARDS SHOWING LOGOS OF ONLINE SERVICES AND WEB SITES ARE EMPLOYED AS MEMORY AIDS FOR MEASURING READERSHIP

Diagram 2

Format: A4, landscape; 105 x 74 mm
Print: one-colored, black-and-white; background colors: yellow and white

The 1999 ACTA ascertains the usage of a total of 59 online services and web sites, for example:



SOURCE: *Allensbach Computer and Telecommunications Analysis* (ACTA'99)

QUESTIONS FOR ASCERTAINING INTERNET READERSHIP

Diagram 3

Filter question

"Do you use one or more online services or the Internet to get information or take advantage of the services, or do you plan on using online services or the Internet in the future? I mean it doesn't matter if you use it for business or private purposes."

Broadest readership, frequency of Internet consumption

"A number of totally different Internet services are shown on these cards. Could you please distribute the cards on this sheet, according to how often you use these services or visit these sites, I mean it doesn't matter if it is for business or private purposes."

Daily or almost daily	Several times a week	Once a week	One to three times a month	Less than once a month	Never used/ visited it
1 2 3 4	1 2 3 4	1 2 3 4	1 2 3 4	1 2 3 4	1 2 3 4

Last visit, recency

"I have here once again the cards showing the different web sites that you have already visited. When did you last visit these sites, I mean aside from today. Please distribute the cards on this sheet here."

Yesterday	Within the last 7 days	About 2 to 4 weeks ago	More than 4 weeks ago
1 2 3 4	1 2 3 4	1 2 3 4	1 2 3 4

SOURCE: *Allensbach Computer and Telecommunications Analysis* (ACTA'99)

ONLINE SURVEYS -
NOT EVEN ONE OUT OF TWO ONLINE USERS
COULD IMAGINE TAKING PART IN ONE

Table 1
Federal Republic
of Germany
Population age 14-64

QUESTION: "There are opinion surveys on the Internet nowadays. Could you imagine yourself ever taking part in a survey on your computer screen, or don't you think you would ever consider doing that?"

	Online users %	
Have already taken part in one	3.8	
Could imagine taking part	42.5	
Is out of the question	42.3	46.3
Undecided, no response	11.3	
	99.9	

SOURCE: *Allensbach Computer and Telecommunications Analysis* (ACTA'99)

WILLINGNESS TO TAKE PART IN ONLINE SURVEYS - THERE ARE CLEAR STRUCTURAL DIFFERENCES

Table 2
Federal Republic of Germany
Online users age 14-64

QUESTION: "There are opinion surveys on the Internet nowadays. Could you imagine yourself ever taking part in a survey on your computer screen, or don't you think you would ever consider doing that?"

	Have already taken part in one, could imagine taking part %	Taking part is out of the question, undecided %
Men	68.1	63.7
Women	31.9	36.3
14-29 years old	39.9	28.1
30 and over	60.1	71.9
I am really fascinated by the Internet	63.9	53.3
On a day when I use the Net or online services, I use it for -		
Less than an hour	19.2	26.3
Half an hour to an hour	38.9	37.9
1-2 hours	32.0	27.8
3 hours and more	9.3	5.1
No response	0.6	2.8
Use the Internet, online services		
Daily, almost daily	41.6	30.0
2-3 times a week	27.0	31.3
Once a week, less often	30.6	36.2
No response	0.8	2.5
Use online services, Internet (excerpt)		
To look for something in a data bank	46.6	36.7
For my school/university studies	28.6	17.5
To meet people, keep in touch	28.0	17.0
To shop	13.4	7.7
Search engines (Used within the last month, excerpt)		
Alta Vista	29.9	20.4
Fireball	26.2	20.6
Lycos 23.3	17.2	
Yahoo Germany	50.8	37.8

SOURCE: *Allensbach Computer and Telecommunications Analysis* (ACTA'99)

INTERNET CONTENTS ARE OFTEN CIRCULATED OFFLINE

Table 3
Federal Republic of Germany
Population age 14-64

QUESTION: "Another question about the Internet and information that is available online. Regardless of whether you personally have access to the Internet or not, it is also possible to get information from the Internet through friends, relatives or colleagues. What's it like in your case, do you sometimes get information from the Internet, it doesn't matter if you receive it by word of mouth or as a printout? Would you say, you get this kind of information . . . "

	Total population 14-64	Online users	Potential users (plan on using)	Non-users with no plans to use
	%	%	%	%
Quite often	10.2	37.3	14.1	3.4
Seldom	23.3	42.6	51.2	16.4
	33.5	79.9	65.3	19.8
Never/no response	66.5	20.1	34.7	80.2
	100.0	100.0	100.0	100.0

SOURCE: *Allensbach Computer and Telecommunications Analysis* (ACTA'99)
(Subsample July, August, 1999 n = 3,451)

IT'S PRECISELY ONLINE USERS WHO ALSO RECEIVE INFORMATION FROM THE INTERNET AS HARDCOPIES

Table 4
Federal Republic of Germany
Population age 14-64

	People who recieve hardcopies of information from the Internet	
	%	Index
Total population	16.2	100
Total online users	45.7	282
Online users for private purposes	43.1	266
Online users for business purposes	55.5	343
Online users for school or university	44.3	273
Online consumption		
Daily, almost daily	59.2	365
Two to three times a week	42.1	260
Once a week, less often	36.1	223

SOURCE: *Allensbach Computer and Telecommunications Analysis* (ACTA'99)
(Subsample July, August, 1999 n = 3,451)

THE DEVELOPMENT OF A NEW MASS MEDIUM

Table 5
Federal Republic
of Germany
Population age 14-64

The consumption of online services, the Internet

	Population age 14-64	
	%	mil.
Fall 1994	4.2	2.11
Spring 1995	4.0	2.05
Fall 1995	5.2	2.63
Spring 1996	5.2	2.62
Fall 1996	7.1	3.60
Spring 1997	7.9	4.00
Fall 1997	9.8	5.01
Spring 1998	10.8	5.49
Fall 1998	13.3	6.80
Spring 1999	15.0	7.62
Spring/Summer 1999	16.9	8.59

Note: Up to Fall 1995 the consumption of BTX services was ascertained

SOURCES: *Allensbach Media Market Analyses* (AWA '95 - AWA '99); *Allensbach Computer and Telecommunications Analysis* (ACTA '99) (Spring/Summer 1999)

ONLINE USERS 1999
THE QUINTESSENCE OF THE SOCIODEMOGRAPHICS

Table 6
Federal Republic of Germany
Population age 14-64

	Online users %	Online users Index
Men	66.3	132
Women	33.7	68
14-19 years old	11.9	124
20-29 years old	26.3	160
30-39 years old	29.4	125
40-49 years old	21.1	102
50-64 years old	11.2	38
Lower level of education	15.2	36
Middle level of education	37.8	102
Higher level of education	47.0	224
School or university student	19.4	211
In occupational training	4.5	132
Employed	67.8	113
Unemployed	8.2	30
Upper class (Level 1-2)	48.2	201
Middle class (Level 3-5)	48.3	83
Lower class (Level 6-7)	3.5	20

INDEX BASE: Population age 14-64
SOURCE: *Allensbach Media Market Analysis* (AWA'99)

THE COMPOSTION OF ONLINE USERS IS SHIFTING

Table 7
Federal Republic
of Germany
Population age 14-64

	Online users					
	1995		1997		1999	
	%	Index	%	Index	%	Index
Sociodemographics						
Men	70.0	141	66.2	133	66.3	132
Women	30.0	60	33.8	67	33.7	68
Lower level of education	21.1	45	16.9	38	15.2	36
Middle level of education	38.6	117	39.8	115	37.8	102
Higher level of education	40.3	196	43.3	206	47.0	224
School or university student	3.4	41	10.7	127	19.4	211
Employed	88.7	146	78.2	130	67.8	113
Unemployed	7.9	26	11.1	35	12.7	41
Upper class (Level 1-2)	53.8	228	48.9	212	48.2	201
Middle class (Level 3-5)	44.5	74	48.1	83	48.3	83
Lower class (Level 6-7)	1.7	11	2.9	16	3.5	20
IT Expertise						
Especially interested in computers	56.9	327	60.1	345	62.6	297
Advisor, IT expert	45.4	347	50.3	396	50.9	339
IT decision maker with specialized competence	31.6	472	35.5	509	37.2	409
Curiosity, innovative power						
Have a good nose for something new	18.0	164	20.4	174	25.9	182
Good nose for something new, innovative	26.7	172	28.0	179	31.4	181
Like to try out new things	59.8	116	58.7	119	63.3	126
Attitude towards technology						
Like to know how something works	60.9	129	63.4	143	56.3	138
Main thing is that it works	31.8	71	29.9	64	33.1	68

INDEX BASE: Population age 14-64 during the respective year
SOURCE: *Allensbach Media Market Analyses* (AWA'95 (partial base), AWA'97, AWA'99)

ONLINE USERS TAKE ADVANTAGE OF THE ENTIRE MEDIA SPECTRUM

Table 8
Federal Republic
of Germany
Population age 14-64

	Population ages 14-64 %	Online users %	Index 1)
Magazine horizon			
Level 1 (very broad)	11.4	19.1	168
Level 2	21.1	29.1	138
Level 3	39.9	38.1	96
Level 4	17.2	9.6	55
Level 5 (very narrow)	10.4	4.1	39
Daily newspaper horizon			
Level 1 (very broad)	9.2	20.4	222
Level 2	19.2	25.9	135
Level 3	29.0	21.0	72
Level 4	33.6	25.7	76
Level 5 (very narrow)	9.0	7.1	78
TV horizon			
Level 1 (very broad)	10.2	17.0	167
Level 2	20.9	23.1	111
Level 3	46.3	40.2	87
Level 4	13.5	10.9	81
Level 5 (very narrow)	9.1	8.7	96

1) Index base: Population 16-64
Newspaper horizon (broadest readership): Level 1, 38 and more of 242 titles; Level 2, 21-37 titles; Level 3, 8-20 titles; Level 4, 4-7 titles; Level 5, 0-3 titles
Daily newspaper horizon (broadest readership): Level 1, 5 and more of 14 newspapers; Level 2, 3-4 newspapers; Level 3, 2 newspapers; Level 4, 1 newspaper; Level 5, 0 newspapers
TV horizon (viewers within past 4 weeks): Level 1, 11 and more of 13 TV stations; Level 2, 9-10 stations; Level 3, 5-8 stations; Level 4, 3-4 stations; Level 5, 0-2 stations

SOURCE: *Allensbach Media Market Analysis* (AWA'99)

MEDIA CONSUMPTION OF ONLINE USERS 1996-1999

Table 9
Federal Republic of Germany
Population age 14-64

Index description: Online users in comparison to the total population (Index 100)

	1996 Index	1997 Index	1998 Index	1999 Index
Online users with a very wide –				
Magazine horizon	147	166	178	168
Newspaper horizon	210	232	235	222
TV horizon	123	145	174	167
Online users with a very high dosage of contacts with -				
Magazines	123	138	147	134
TV	83	94	86	114

SOURCE: *Allensbach Media Market Analyses* (AWA'96-'99)

THE INTENSITY OF ONLINE CONSUMPTION IS ON THE RISE

Table 10
Federal Republic of Germany
Online users

	Online users 1) 1997 %	1998 %	1999 %
How often do you use online services or the Internet?			
Daily, almost daily	26.1	30.5	35.4
2-3 times a week	34.9	29.9	29.3
Once a week	24.6	19.6	18.6
Less often	12.2	18.4	15.1
No response	2.2	1.6	1.6
Do you think your use of online services will increase in the next couple of years, or will it remain the same, or will you use online services more seldom than you do today?			
More and more	66.9	69.9	70.8
Situation will remain the same	26.1	23.1	23.7
Use less than today	2.2	2.1	1.7
Undecided	4.7	5.0	3.7

1) 1997: Online users age 14-54; 1998 and 1999: online users age 14-64

SOURCE: *Allensbach Computer and Telecommunication Analyses* (ACTA'97-'99)

ONLINE USERS ARE INCREASINGLY SATISFIED WITH ONLINE SERVICES

Table 11
Federal Republic of Germany
Online users

	Online users 1)		
	1997	1998	1999
	%	%	%
With online services and the Internet, I am all in all -			
Satisfied	63.0	66.5	69.2
Not really satisfied	19.0	15.0	12.4
Undecided	18.0	18.5	18.4
It bothers me to wait so long for the page I want to appear on the screen	46.3	40.6	32.9
Is it easy to find something quickly on the Internet, or is it too complicated?			
It's easy	45.3	46.6	51.3
Too complicated	33.3	31.8	27.9
Undecided	21.4	21.7	20.7

1) 1997: online users age 14-54; 1998 and 1999: online user age 14-64
SOURCE: *Allensbach Computer and Telecommunication Analyses* (ACTA'97-'99)

ONLINE USERS ARE OFTEN ALSO READERS OF THE PRINTED VERSIONS

Table 12
Federal Republic of Germany
Online users age 14-64

Readers of the corresponding printed issue	Readers of the online issue 1998 %	1999 %
Bild	77.3	75.5
Chip	72.8	74.5
DM	51.3	63.6
Focus	86.8	88.1
Handelsblatt	71.7	68.9
PC Welt	65.8	69.5
Spiegel	90.9	88.7
Stern	86.7	86.2
TV Spielfilm	69.8	72.7
Die Welt	72.0	73.4
WirtschaftsWoche	66.2	68.5
Die Zeit	72.4	76.6
On average	73.6	75.5

SOURCE: *Allensbach Computer and Telecommunications Analyses* (ACTA'98,'99)

WEBSITES WITH LATENT POTENTIAL

Table 13
Federal Republic
of Germany
Online users age 14-64

	Readers of the printed issue who are also online users	
Readers of the corresponding online issue	1998 %	1999 %
Bild Online	18.5	13.0
Chip online	42.1	36.0
DM Online	29.3	22.4
Focus Online	36.5	31.1
Handelsblatt Interaktiv	32.8	27.7
PC-Welt online	32.4	34.3
Spiegel Online	30.2	28.5
Stern Online	21.5	20.5
TV Spielfilm netWorld	25.0	15.3
Die Welt online	22.3	18.2
WirtschaftsWoche heute	32.2	27.1
Zeit im Internet	25.5	20.5
On average	29.0	24.6

SOURCE: *Allensbach Computer and Telecommunications Analyses* (ACTA'98,'99)

ONLINE READERS HAVE A HIGHER READING FREQUENCY

Table 14
Federal Republic of Germany
Online users age 14-64

	Online users who read the magazine *Focus*			
	Read online version of *Focus*		Do not read online version of *Focus*	
Read the printed version of *Focus* -	%		%	
Regularly, all issues	9.0	45.7	4.3	22,7
Fairly regularly	13.3		5.1	
Fairly often	23.4		13.3	
Now and then	33.0	54.3	40.0	77.3
Very seldom	21.3		37.3	

SOURCE: *Allensbach Computer and Telecommunications Analyses* (ACTA'98, '99)