MEDIA BRANDS: HOW MUCH STRONGER THANKS TO THEIR INTERNET PRESENCE?

Jochen Hansen and Johannes Schneller, Institut für Demoskopie Allensbach

Introduction

Given the relatively low levels of Internet advertising revenue—which currently, despite hefty annual increases, still represent less than two percent of all advertising expenditures in Germany—it is understandable that media publishers are beginning to wonder whether their costly Internet portals are in fact worthwhile.

It seems shortsighted, however, to answer this question based solely on the criterion of whether (or not) a site is currently able to cover its operating costs. Another decisive criterion should be the extent to which the presence of a particular brand on the Internet serves to boost brand acceptance. In other words, have various print media brands (such as *Der Spiegel*, *Focus*, and *Stern*) become more attractive thanks to their Internet sites, have they been fundamentally strengthened or perhaps even somewhat weakened as brands?

These are the questions that the present paper intends to clarify, based on long-term coverage figures and the findings of various investigative approaches designed to ascertain brand quality.

Source of the Data: A Broadly Based, Representative Multi-Media Market Study

The main source we shall refer to is the *Allensbach Computer and Technology Analysis* (ACTA),* a study conducted annually since 1997 based on a representative sample of the German population age 14-64, comprising a total of about 10,000 face-to-face interviews completed in two waves per year.

Total Internet Usage

As important background information on the Internet and Internet usage, the ACTA data ascertained in Spring 2003 indicate that

- more Germans than ever—a total of 53.5 percent—are now Internet users, an increase that is documented in Figure 1,
- and that with respect to the frequency of Internet usage, more online users than ever—almost fifty percent in 2003—now use the Internet on a daily basis (which, however, also means that half still do not use it every day, as shown in Figure 2);
- at the same time, however, the findings for 2003 show that people are not spending any more time online than they did in previous years, with most people continuing to use it for less than an hour a day (Figure 3).

* Until 2002, the study was known as the *Allensbach Computer and Telecommunications Analysis*.

Development of Internet Usage

Figure 1

Use the Internet/online services

German population age 14-64

	%	Mio.
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
Spring 2000	26,9	13,76
Summer 2000	29,7	15.19
Spring 2001	38,7	19.69
Summer 2001	40,7	20,70
Spring 2002	45,5	23,08
Summer 2002	46,3	23,49
Spring 2003	53,5	27,14

Note: Until Fall 1995, BTX users were ascertained
SOURCE: *Allensbach Media Market Analyses* (AWA) 1995 – 1999, *Allensbach Computer and Technology Analyses* (ACTA; values from Spring/Summer 1999 on)

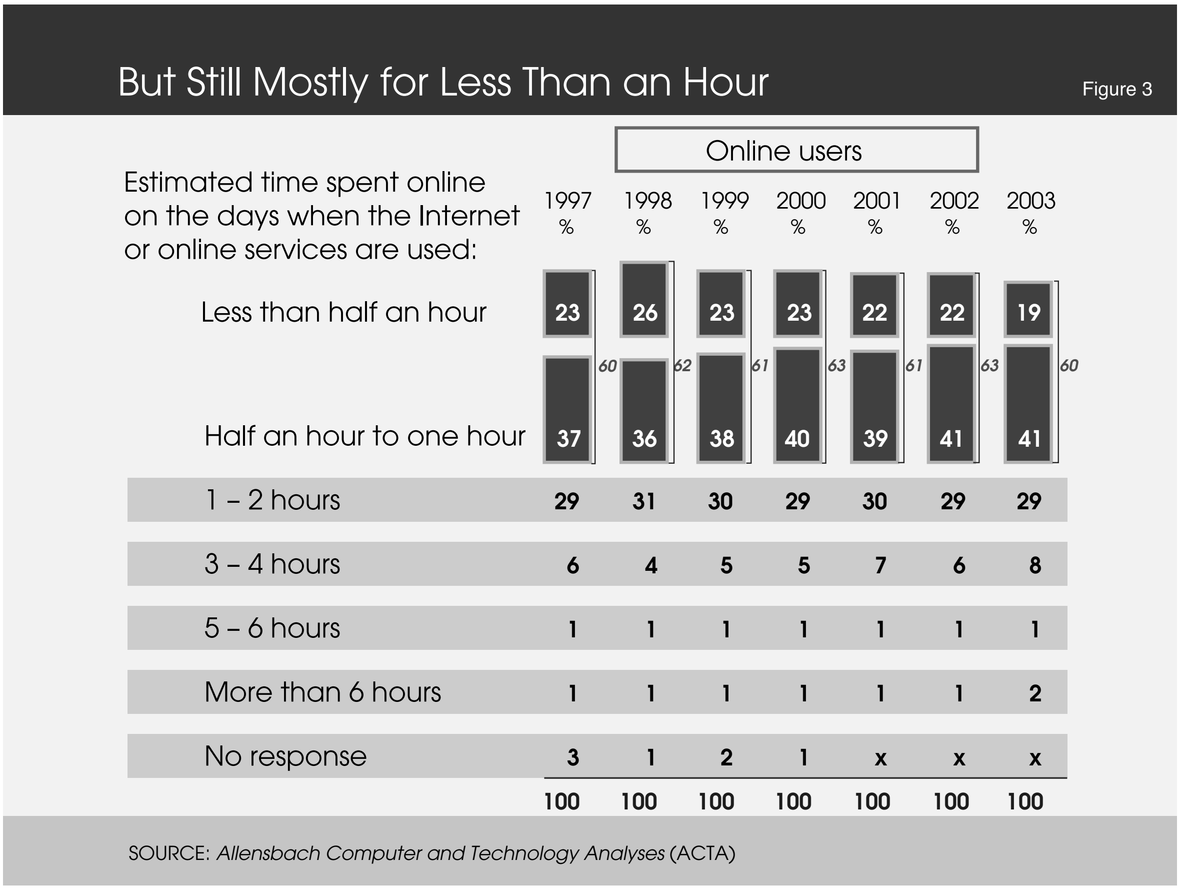
More Regular Online Usage

Figure 2

Internet users

Use the Internet –	1997 %	1998 %	1999 %	2000 %	2001 %	2002 %	2003 %
daily, almost daily	26	30	35	41	43	43	48
two to three times a week	35	30	29	29	29	33	32
once a week	25	20	19	15	13	13	11
less often than that	12	18	15	15	15	11	9
No response	2	2	2	x	x	x	x
	100	100	100	100	100	100	100

SOURCE: *Allensbach Computer and Technology Analyses* (ACTA)



Question Models Used to Measure Coverage Levels

The ACTA includes a number of questions designed to ascertain individual aspects of Internet usage, for example, how often respondents use the Internet for various purposes or to obtain certain contents, what kinds of purchases they make on the Internet, via which channels of commerce, how they prefer to pay for online purchases, up to the question of whether or how often they click on advertising banners.

These criteria allow us to define individual target groups very concretely and to illustrate them quite vividly. In the following discussion, however, we shall concentrate on criteria pertaining to the coverage of various online services, well over a hundred of which have been ascertained in the ACTA since 1998.

Regarding the approach employed: as an identification aid, respondents are given a stack of cards showing the distinctive logos of the different Internet sites and services, which are thus ascertained using essentially the same procedure employed in most media market studies to measure the coverage and audiences of print and electronic advertising media.

Two basic questions are posed in conjunction with the cards:

- a *frequency question*, that is, how often each particular Internet service is used. Here, respondents who choose one of the following five gradations are classified as belonging to the broadest audience of each particular service: "daily, almost daily," "several times a week," "once a week," "one to three times a month," or "less than once a month" (the remaining categories included in this question model are "have only heard of it" and "never heard of it").

- Respondents who belong to the broadest audience of each particular service are then asked the *recency question*, i.e. when the online service was last used, with responses being divided into four categories: "yesterday," "within the last 7 days," "about 2 to 4 weeks ago," and "more than 4 weeks ago."

Based on the broadest audience, the probability of exposure is then calculated (for individual segments, which are primarily determined according to the categories included in the frequency question, the outer criteria being "users in the last 4 weeks" and, respectively, "users in the last 7 days"). Thus, for each of the online services ascertained in the ACTA, valid measurements are available with respect to:

- broadest audience,
- audience per month, and
- audience per week—whereby, as the number of Internet users continues to grow, evaluations of online coverage are increasingly focusing on the percentage of persons who use these services at least once a week.

Therefore, as is the case with the print media ascertained within the framework of the *Allensbach Media Market Analysis* (AWA), online media coverage is also measured in the ACTA using a *temporally unrestricted* question model, meaning that people who only seldom use the various online services are also asked to indicate when they last came into contact with each particular service (a point we shall touch on again later in the discussion).

Coverage of Online Services in 2003

The ACTA 2003 ascertains the audiences of just under 100 Internet services and of a similarly large number of (almost all important) print media and combination rates, along with a dozen TV channels and cinemagoers. It is thus a multimedia market study that facilitates intermedial advertising campaign planning.

The coverage levels obtained by all of the different online sites and services ascertained in the ACTA are documented in Chart 4, which ranks the various services according to the percentages obtained for weekly usage (among all Internet users), although findings on monthly usage and the broadest audience—along with an index showing the extent to which the broadest audience uses each particular service on a weekly or monthly basis—are also included. When it comes to the individual services, we find, for example, that

- online services that tend to be used most often on the whole, such as Google and T-Online, are also used most often on a weekly basis, namely, by more than 60 percent (index, referring to the broadest audience),
- whereas other services that also have a strong overall presence in Germany, such as Ebay or Yahoo, are nevertheless not used nearly as often on a weekly basis (specifically, by 54 or, respectively, 38 percent of their broadest audiences).
- When it comes to the online editions of various *print media* titles, the highest weekly coverage among Internet users is obtained by the Internet portals of various local and regional daily newspapers, which are used by 13.4 percent per week. Next in line is Bild.de, at 6.2 percent, followed by Spiegel Online (5.3 percent), along with the Internet portals offered by Focus (4.4 percent), kicker (4.0 percent), stern.de (3.9 percent), Computer Bild and Chip (3.4 percent each). All of the other electronic editions of print media titles ascertained in the ACTA are used by less than 3 percent on a weekly basis. On the whole, we can thus say that the online editions of print media publications tend to be in the middle, and not at the top of the list of Internet addresses used most often.

Finally, the sum totals for all online services indicate that, on average, Internet users –

- belong to the broadest audience of about 16 of the services ascertained (specifically, 15.9),
- and that they use about 10 services at least once a month (9.7),
- while about 5 services are used on a weekly basis (5.2).

CHART 4

Coverage of Online Services in 2003

	Internet users who use a service/site –					
	Shares in %			Index		
	per week	per month	Total (broadest audience)	per week	per month	Total (broadest audience)
Google Deutschland	51,5	65,8	74,4	69	88	100
T-Online.de	41,5	51,6	64,4	64	80	100
Ebay	38,2	56,9	70,9	54	80	100
Yahoo Deutschland	24,4	44,0	64,0	38	69	100
Web.de	21,8	30,9	43,0	51	72	100
Freenet.de	19,8	29,5	42,5	47	69	100
AOL.de	16,5	23,6	35,8	46	66	100
AOL (subscriber service)	16,1	19,8	25,6	63	77	100
Lycos	16,0	29,7	48,0	33	62	100
GMX	13,8	18,5	26,9	51	69	100
– Internet portal of local or reg. daily newsp.	13,4	22,9	34,0	39	67	100
Die Bahn DB	12,4	29,6	54,1	23	55	100
MSN.de	10,8	18,3	28,0	39	65	100
Fireball	9,6	21,4	37,2	26	58	100
Netscape.de	8,7	12,6	22,5	39	56	100
Wetter.com	8,6	18,1	27,7	31	65	100
Wissen.de	7,6	19,5	33,0	23	59	100
Geizkragen.de	7,5	15,2	26,5	28	57	100
Wetteronline.de	6,3	12,6	20,7	30	61	100
Bundesliga.de	6,3	10,3	15,2	41	68	100
– Bild.de	6,2	12,9	19,9	31	65	100
x RTL World	5,3	12,7	23,1	23	55	100
– Spiegel Online	5,3	11,7	20,5	26	57	100
L'Tur	5,2	13,9	32,5	16	43	100
– ADAC online	5,0	14,2	30,1	17	47	100
AutoScout24	5,0	13,7	27,3	18	50	100
x MTV.de	4,9	9,9	14,9	33	66	100
Kostenlos.de	4,6	11,4	20,9	22	55	100
– Focus Online	4,4	11,6	20,1	22	58	100
Sport1	4,4	7,6	11,4	39	67	100
Tui.de	4,3	12,9	31,6	14	41	100
AltaVista	4,1	10,1	20,7	20	49	100
x n-tv online	4,1	7,4	13,1	31	56	100
Mobile.de	4,0	9,9	17,4	23	57	100
– Kicker online	4,0	6,4	10,1	40	63	100
– Stern.de	3,9	10,8	20,7	19	52	100
Falk	3,5	8,7	16,1	22	54	100
– Computer Bild online	3,4	10,1	17,2	20	59	100
– Chip Online	3,4	8,4	13,3	26	63	100
– Boerse-online.de	3,3	6,1	9,5	35	64	100
x ProSieben Online	3,1	8,6	17,2	18	50	100
x SAT.1 online	3,0	9,0	18,0	17	50	100
x Viva.tv	3,0	7,6	13,2	23	58	100
CompuServe.de	2,9	6,6	14,5	20	46	100
Tiscali	2,9	4,9	9,6	30	51	100
– Sueddeutsche.de	2,7	7,0	12,2	22	57	100
– PC WELT.de	2,7	5,7	9,7	28	59	100
Giga.de	2,6	4,7	7,3	36	64	100
– Zeit.de	2,5	6,4	11,4	22	56	100
CompuServe (subscriber service)	2,4	3,8	6,7	36	57	100
– Autobild.de	2,3	6,7	11,5	20	58	100
Boerse.de	2,3	4,5	6,6	35	68	100
Heise online	2,1	5,0	7,2	29	69	100

.../

/...

	Internet users who use a service/site –					
	Shares in %			Index		
	per week	per month	Total (broadest audience)	per week	per month	Total (broadest audience)
Heise online	2,1	5,0	7,2	29	69	100
ZDNet Deutschland	2,1	4,2	6,5	32	65	100
Handy.de	2,0	5,6	11,6	17	48	100
PC Games.de	1,9	4,8	9,2	21	52	100
– Cinema online	1,8	6,1	11,9	15	51	100
– Die Welt.de	1,8	5,5	10,1	18	54	100
Comdirect	1,8	3,4	6,2	29	55	100
Premiere Online	1,7	3,6	6,3	27	57	100
GameStar.de	1,7	3,2	5,6	30	57	100
Travelchannel	1,6	4,8	10,6	15	45	100
– Handelsblatt.com	1,5	4,3	7,1	21	61	100
Ricardo.de	1,5	4,2	9,9	15	42	100
– WirtschaftsWoche.de	1,4	3,4	6,9	20	49	100
– Brigitte.de	1,4	3,4	6,9	20	49	100
Uboot	1,4	3,2	7,2	19	44	100
– TV Movie.de	1,4	3,1	6,5	22	48	100
PC-Shopping Online	1,3	3,7	6,2	21	60	100
– TV Spielfilm Online	1,3	3,6	6,8	19	53	100
– Bravo.de	1,3	3,5	6,9	19	51	100
– FAZ.net	1,3	3,0	6,0	22	50	100
– Financial Times Deutschland.de	1,3	2,8	5,3	25	53	100
Edgar.de	1,3	2,4	5,5	24	44	100
Gamigo.de	1,2	2,4	4,6	26	52	100
– Tomorrow Online	1,1	4,0	9,3	12	43	100
– Freundin online	1,1	2,6	5,2	21	50	100
Consors	1,1	2,5	4,6	24	54	100
Ciao.com	1,1	2,2	4,6	24	48	100
Jamba! Online	1,0	2,9	8,6	12	34	100
– Fit for fun Online	0,9	3,5	8,3	11	42	100
Teltarif.de	0,9	2,3	5,1	18	45	100
– TV Today Online	0,8	2,7	5,8	14	47	100
– Computerwoche Online	0,8	2,3	5,0	16	46	100
– Finanzen.net	0,8	1,7	2,5	32	68	100
Onvista	0,8	1,6	2,8	29	57	100
– Yam.de	0,7	2,2	5,0	14	44	100
– Wallstreet:online	0,7	1,8	3,5	20	51	100
– Manager Magazin online	0,5	1,4	3,1	16	45	100
Qualimedic	0,5	1,4	2,8	18	50	100
TecChannel.de	0,5	1,2	2,5	20	48	100
Finanztreff.de	0,5	1,1	2,1	24	52	100
– Amica Online	0,4	1,6	3,7	11	43	100
– Handelsblatt Junge Karriere Online	0,4	1,3	3,6	11	36	100
– DMEuro.com	0,4	1,3	2,2	18	59	100
– Max Online	0,3	1,9	4,7	6	40	100
– Macwelt Online	0,3	1,2	2,4	13	50	100
– Vogue.com Deutschland	0,2	1,2	2,4	8	50	100
	520,9	**976,8**	**1600,7**			
Index for 98 Internet services	**33**	**61**	**100**	**33**	**61**	**100**

Online editions of:
– Print media
x Television channels

SAMPLE: Internet users age 14 to 64
SOURCE: *Allensbach Computer and Technology Analysis* (ACTA)

Consumption Is Generally Sporadic

The fact that only about a third of the broadest audience can thus be included among the group of weekly users, and that people generally tend to be occasional or seldom users, by no means applies only to the online media but rather to most print media as well. Thus, for example, the weekly newsmagazine *Stern*

- is read regularly or fairly often by 19 percent of the title's broadest readership,
- whereas 38 percent read it occasionally,
- and 43 percent seldom read it.

The figures ascertained for two additional weekly newsmagazines are quite similar, with

- *Der Spiegel* obtaining 23, 35 and 42 percent in these same categories,
- and *Focus* obtaining 20, 35 and 45 percent (Chart 5).

CHART 5

Generally Not Regular Readers

Broadest readership of –

Persons who read this title –	Stern %		Der Spiegel %		Focus %	
"regularly, and specifically, every issue that is published"	4		5		4	
"fairly regularly, although not every issue"	5	19	6	23	6	20
"also fairly often"	10		12		10	
"now and then"	38		35		35	
"(very) rarely"	43		42		45	
	100		100		100	

SAMPLE: Population 14 and over
SOURCE: *Allensbach Media Market Analysis* (AWA) 2003

Thus, we should not underestimate the importance of sporadic users, whose significance in the print sector has grown substantially over the past decades—in conjunction with a tremendous increase in the number of print titles and, at the same time, an overall stagnation in the time devoted to print media consumption. This trend must be taken into account by any question model designed to ascertain coverage levels, whereby basic research has shown that temporally restricted filter questions prevent sporadic readers of print titles to an above-average extent from assessing themselves as users in a given publication interval. Thus, in measuring coverage rates, the media studies by the Allensbach Institute do not employ any questions with a pre-determined time filter (for the recency question). Experiments have shown how gravely coverage measurements may differ depending on the question model employed; c. Friedrich Tennstädt and Jochen Hansen, "Validating the Recency and Through-the-book-Techniques," in Readership Research Symposium: Theory and Practice. Proceedings fo the First International Symposium New Orleans 1981, ed. Harry Henry, London 1982, pp. 196-221

Coverage Trends among the Online Editions of Print Media Titles

About half of the online services ascertained in 2003 are provided by media that also exist under the same name as print or electronic media.

A number of such services have been included in the ACTA since 1998. Chart 6 shows the trend among the total population for 15 online editions of print titles—with most of the coverage rates ascertained showing a clearly positive trend.

CHART 6

How the Coverage of the Online Editions of Selected Print Media Has Developed among the Population

	1998		1999		2000		2001		2002		2003	
	%	mill.	%	mill.	%	mill.	%	mill.	%	mill.	%	mill.
Total population		**51,1**		**50,9**		**51,1**		**50,9**		**50,7**		**50,7**
Broadest audience of the online editions of –												
Focus	3,6	1,84	4,4	2,24	6,8	3,47	6,6	3,33	8,0	4,03	10,7	5,46
Spiegel	2,9	1,46	4,0	2,03	5,4	2,77	5,7	2,91	7,7	3,89	11,0	5,56
Stern	2,0	1,03	2,8	1,43	4,5	2,31	5,8	2,93	7,8	3,94	11,1	5,62
TV Spielfilm	1,6	0,80	1,4	0,72	2,1	1,10	3,3	1,67	3,9	1,98	3,6	1,85
Cinema	–	–	–	–	3,0	1,53	4,8	2,45	6,7	3,38	6,4	3,23
Fit for fun	–	–	–	–	1,8	0,92	3,2	1,66	4,8	2,41	4,4	2,25
Tomorrow	–	–	–	–	3,5	1,79	4,5	2,29	4,2	2,12	5,0	2,52
Chip	2,4	1,24	2,3	1,18	2,9	1,48	3,5	1,77	4,7	2,38	7,1	3,61
PC Welt	1,9	0,97	2,4	1,21	2,7	1,36	4,3	2,18	5,2	2,63	5,2	2,63
Wirtschaftswoche	1,3	0,67	1,8	0,92	2,1	1,06	2,6	1,34	2,9	1,48	3,7	1,87
Die Zeit	1,3	0,69	1,3	0,81	1,3	0,92	2,9	1,49	3,9	2,00	6,1	3,09
Handelsblatt	1,5	0,77	1,9	0,95	2,1	1,07	2,7	1,39	3,4	1,75	3,8	1,93
Süddeutsche Zeitung	–	–	1,1	0,57	1,8	0,93	3,3	1,65	4,7	2,40	6,6	3,31
Die Welt	1,4	0,70	1,3	0,66	1,6	0,81	2,3	1,15	3,7	1,89	5,4	2,74
Bild	1,4	0,69	1,4	0,73	2,7	1,39	4,2	2,14	7,3	3,70	10,7	5,40
					44,3	22,91	59,6	30,35	78,9	39,98	100,6	51,08

– = not ascertained this year

SAMPLE: Population age 14 to 64
SOURCE: *Allensbach Computer and Technology Analyses* (ACTA) 1998 - 2003

So much for the overall trends. In this regard, it is important to note that even if most of the online editions are now used by a greater absolute number of people, this by no means automatically implies that their coverage is also increasing among Internet users. In fact, the coverage of most of the online editions has actually declined over the past few years—and this despite the fact that the absolute number of users has increased in most cases. The only explanation for this phenomenon is, of course, that the total universe of Internet users has expanded considerably from year to year. Chart 7 documents the development of both the absolute number of users and coverage levels among Internet users.

CHART 7

How the Coverage of the Online Editions of Selected Print Media Has Developed among Internet Users

	1998		1999		2000		2001		2002		2003	
	%	mill.	%	mill.	%	mill.	%	mill.	%	mill.	%	mill.
Number of Internet users		**6,0**		**8,58**		**14,7**		**20,3**		**23,3**		**27,1**
Broadest audience of the online editions of –												
Focus	30,6	1,84	26,1	2,24	23,7	3,47	16,4	3,33	17,3	4,03	20,1	5,46
Spiegel	24,3	1,46	23,7	2,03	18,9	2,77	14,3	2,91	16,7	3,89	20,5	5,56
Stern	17,1	1,03	16,6	1,43	15,8	2,31	14,4	2,93	16,9	3,94	20,7	5,62
TV Spielfilm	13,2	0,80	8,4	0,72	7,5	1,10	8,2	1,67	8,5	1,98	6,8	1,85
Cinema	–	–	–	–	10,4	1,53	12,0	2,45	14,5	3,38	11,9	3,23
Fit for fun	–	–	–	–	6,3	0,92	8,2	1,66	10,3	2,41	8,3	2,25
Tomorrow	–	–	–	–	12,2	1,79	11,3	2,29	9,1	2,12	9,3	2,52
Chip	20,6	1,24	13,8	1,18	10,1	1,48	8,7	1,77	10,2	2,38	13,3	3,61
PC Welt	16,1	0,97	14,1	1,21	9,3	1,36	10,7	2,18	11,3	2,63	9,7	2,63
Wirtschaftswoche	11,2	0,67	10,7	0,92	7,2	1,06	6,6	1,34	6,3	1,48	6,9	1,87
Die Zeit	11,4	0,69	9,4	0,81	6,3	0,92	7,3	1,49	8,6	2,00	11,4	3,09
Handelsblatt	12,8	0,77	11,0	0,95	7,3	1,07	6,8	1,39	7,5	1,75	7,1	1,93
Süddeutsche Zeitung	–	–	6,6	0,57	6,3	0,93	8,1	1,65	10,3	2,40	12,2	3,31
Die Welt	11,6	0,70	7,7	0,66	5,5	0,81	5,7	1,15	8,1	1,89	10,1	2,74
Bild	11,5	0,69	8,5	0,73	9,5	1,39	10,5	2,14	15,9	3,70	19,9	5,40
					156,3	22,91	149,2	30,35	171,5	39,98	188,2	51,08

– = not ascertained this year

SAMPLE: Internet users age 14 to 64
SOURCE: *Allensbach Computer and Technology Analyses* (ACTA) 1998 - 2003

Strong Affinity between Online and Print Editions

Thus far, we have outlined the overall coverage trends observed for the online editions of print titles. Since the ACTA ascertains not only the Internet editions, but also the coverage of the corresponding print media, we can also determine whether and to what extent using the print and online editions of the same media brand serves to boost overall usage of that brand. At a very early point, it was evident that Internet users who read the print edition of a particular media brand also tend to make greater use of that same title's corresponding Internet portal. This connection continues to be very close, as illustrated, for example, by the fact that –

- about 15 percent of those persons who read the weekly newsmagazine *Der Spiegel* during a given publication interval also use Spiegel-Online at least once a week,
- as compared to only 2 percent of those who do not belong to *Spiegel*'s readers per issue.
- Furthermore, for a total of twelve titles, we find that the corresponding Internet sites are, on average, used 10 times more often on a weekly basis by the readers per issue of a particular title than by those who do not read the print edition during a given publication interval.

As Chart 8 shows, this relationship has remained fundamentally unchanged ever since we first began measuring online coverage. Moreover, we also find a clear connection—albeit not quite so strong—when it comes to monthly users or the broadest audience of the various online media (for additional findings on broadest audiences, see: Jochen Hansen, "Print Media Internet Portals: A Boon or Bust for Print Media Consumption?," in Worldwide Readership Research Symposium, Venice 2001, Session papers, pp. 377-391; here p. 386).

CHART 8

Internet Editions of Print Brands: On Average, Used about 10 Times More Often by a Title's Readers Than by Non-Readers

	Internetnutzer, die jeweils –			
	readers per issue of this particular title		not readers per issue of this particular title	
	1998 %	2002 %	1998 %	2002 %
Persons who use the Internet edition of this title at least once a week				
Der Spiegel	17,0	14,5	2,5	2,2
Focus	17,9	12,5	4,3	2,3
Stern	6,3	8,4	1,7	1,8
TV Spielfilm	12,5	5,9	2,6	1,1
TV Today	8,7	3,6	1,4	0,8
PC Welt	9,9	20,8	2,6	1,3
Chip	18,8	31,2	2,2	1,7
Die Zeit	18,8	14,8	1,8	0,9
Wirtschaftwoche	25,1	20,3	2,4	0,9
Handelsblatt	31,3	27,0	2,7	1,3
Die Welt	16,7	11,5	1,9	1,2
Bild	13,0	13,0	1,8	3,0
	196,0	**183,5**	**27,9**	**18,5**
Index	**100,0**	**100,0**	**14,235**	**10,082**

SAMPLE: Internet users age 14 to 64
SOURCE: *Allensbach Computer and Technology Analyses* (ACTA)

Expanded Audiences for Media Brands and Crossmedia Combinations

The closer the correlation between the print and online audiences of a particular title, the more this, of course, limits the growth of that media brand's audience. Nevertheless, we can still assume that the media's presence on the Internet has, as a rule, served to markedly *expand* the audiences of various titles: for example, in comparison with the average print readership, the audience reached via the Internet by the three major German weekly newsmagazines, *Spiegel*, *Stern*, and *Focus*, increased –

- from 6 to 14 percent when it comes to contacts at least *once a week* with the Internet editions—meaning that audience size did not necessarily increase to the same degree among magazines in the same media genre. At the same time, we find that

- when it comes to Internet contacts at least *once a month*, the number of users reached by these three media brands was from 19 to 35 percent greater than the audiences reached by the corresponding print editions alone; hence, the Internet has led to substantial increases in audience size, although here again, not every brand has gained to the same extent.

Thus, if we are interested solely in contacts with a particular media brand, we must consider all persons who use either the print or online edition of that title. The Allensbach "crossmedia combinations" define these audiences for purposes of media planning, in other words, those persons who belong to either the readers per issue of the print title or users per week of the online edition of a media brand. Viewed in this way, for example, we find that

- the "Spiegel plus Crossmedia Combo" attained a joint coverage rate in 2002 of 12.5 percent (among the population age 14-64), based on the coverage of the print edition of *Spiegel* (at 11.4 percent) and of Spiegel-Online (2.0 percent), meaning that total coverage increased 10 percent in comparison to print coverage alone;

- whereas the "Stern Crossmedia Combo," with the print edition of *Stern* (14.5 percent) and Stern-Online (1.3 percent), attained a joint coverage rate of 15.4 percent (which is a 6-percent increase in comparison to the title's print coverage),

as shown in more detail in Chart 9. Even greater coverage gains are found in connection with more specialized titles, for example, from the computer sector:

- The "Chip Crossmedia Combo" has a joint coverage rate of 3.8 percent, comprising 2.8 percent for the print edition and 1.6 percent for the title's Internet portal, which represents an increase of 36 percent in comparison to print coverage alone, while

- the "PC WELT Crossmedia Combo" attains a total coverage of 4.0 percent—3.2 and 1.2 percent for the print and online editions, respectively—which is a 25-percent increase in comparison to the title's print coverage.

CHART 9

How Online Editions Have Expanded the Audiences of Media Brands

	Focus	Der Spiegel	Stern	Chip	PC Welt
	%	%	%	%	%
Average-issue readership	9,5	11,4	14,5	2,8	3,2
Persons who use the online edition of this title –					
per month	4,4	4,3	3,9	3,0	3,1
per week	1,8	2,0	1,3	1,6	1,2
Readers per issue or users of the online edition –					
per month	12,8	14,1	17,2	4,7	5,4
Index rpi=100	**135**	**124**	**119**	**168**	**169**
per week	10,8	12,5	15,4	3,8	4,0
Index rpi=100	**114**	**110**	**106**	**136**	**125**

SAMPLE: Population age 14 to 64
SOURCE: *Allensbach Computer and Technology Analysis* (ACTA) 2002

Users of a Title's Online and Print Editions Are Especially Regular Readers

Logically, it would seem reasonable to assume that persons who use both the print edition of a particular title and its online counterpart would refer to the hardcopy version of the magazine less regularly than people who only read the print edition. This, however, is not the case—in fact, the opposite clearly applies: the readers per issue of a particular magazine title who also use the title's online portal at least once a month are far more likely to be *regular* readers of the print title than those readers per issue (among Internet users) who seldom or never visit the title's Internet site.

For example, 28 percent of those who use the print and online editions of *Spiegel* are regular readers; in contrast, a mere 17 percent of those Internet users who only read the print edition of *Spiegel* are regular readers. The corresponding figures are 25 to 12 percent for *Stern*.

Similar findings are obtained with regard to another (even stricter) defining criterion: i.e., respondents who actually held the publication "in their hand yesterday." Here, we find that 44 percent of those *Spiegel* readers who use both the print and online editions actually had a copy of the publication in their hands the day before the interview, as compared to only 23 percent of those (Internet users) who only read the print edition. The corresponding figures are 39 vs. 27 percent for *Stern*.

CHART 10

People Who Use Both the Print and Online Editions of a Media Brand Are Above-Average When It Comes to Frequency of Reading the Print Edition

Readers per issue of -

	Der Spiegel				**Focus**				**Stern**			
	Spiegel-Online- Users *)		Non-users		Focus-Online- Users *)		Non-users		Stern-Online- Users *)		Non-users	
Persons who read this title –												
regularly	28		17		12		12		25		16	
fairly regularly	29	80	17	56	22	66	14	46	17	66	15	51
fairly often	23		22		32		20		24		20	
now and then	16		30		27		37		27		34	
rarely	4		14		7		17		7		15	
	100		100		100		100		100		100	
Respondents who held the title– in their hand yesterday	44		23		25		20		39		27	

*) Users per month

SAMPLE: Population age 14 to 64
SOURCE: *Allensbach Computer and Technology Analysis* (ACTA) 2002

High-Carat Print and Online Users

Readers who use a title's Internet portal continue to be *high-class* users of the *print* medium; apparently, Internet content alone cannot completely satisfy all their informational and entertainment needs. And this even though they also use the Internet for a far above-average range of different purposes. Within the framework of the ACTA, respondents are asked whether they use almost three dozen different types of Internet content regularly, fairly often, now and then, only very rarely, or never. The findings reveal that Internet users

- use an average of 3.6 fields regularly,

a figure that is clearly higher among those Internet users who also belong to the readers per issue of weekly newsmagazines; here, we find that

- *Spiegel* readers top the list, with an average of 4.7 fields, as compared to 3.4 fields among those who do not read *Spiegel*,

- while the corresponding figures for *Focus* are 4.5 and 3.5 fields, and

- 4.4 and 3.5 fields for the newsmagazine *Stern*.

This, however, by no means applies to all Internet content and activities, for example, content pertaining solely to the entertainment sector. For instance, with respect to activities such as chatting (conversing with other users) or getting to know new people and content such as TV guides or information on cosmetics, the readers of these magazines are not represented any more strongly than non-readers.

CHART 11

On the Internet: Print Users Make Far Above-Average Use of Internet Contents

Internet contents used regularly or fairly often –	Total Internet users	Der Spiegel		Focus		Stern	
		Readers per issue	Not readers per issue	Readers per issue	Not readers per issue	Readers per issue	Not readers per issue
	%	%	%	%	%	%	%
Email	63	71	62	68	63	71	62
Online-, homebanking	29	32	28	34	28	33	28
Information for school	22	28	21	28	21	25	22
Downloading software	18	21	18	20	18	19	18
The latest political news	14	27	11	22	13	20	13
Reference works	14	20	12	19	13	18	13
Conversing with other users (chatting)	12	11	12	11	12	11	12
Sending and receiving faxes	11	13	11	15	11	15	11
Sports news	11	13	10	12	10	13	10
Product information	11	14	10	13	10	14	10
Stock market prices	10	15	9	15	9	13	10
Weather report, advisories for travellers	10	14	9	14	10	15	9
Information on vacation destinations	10	14	10	13	10	14	10
Meeting new people	10	10	10	10	10	9	10
Computer news	10	14	9	15	9	12	9
Information on trade, industry	10	14	9	14	9	12	9
Calendars of events	9	14	8	11	9	13	9
Employment, job ads	9	9	9	9	9	10	9
Bus, train and plane schedules	9	14	8	12	8	12	8
The latest business news	9	16	8	13	8	11	9
Information from banks	8	10	8	11	8	11	8
Games played against the computer	8	7	8	6	8	6	8
Newspaper and magazine archives	5	12	4	8	5	9	5
Car ads, offers	5	4	5	6	5	6	5
Investment advice	5	8	4	8	5	7	5
Buying and selling stocks	5	7	4	7	4	6	4
Traffic updates	4	6	4	5	4	5	4
TV guide, program	4	4	4	4	4	4	4
Insurance policies	3	5	3	6	3	4	3
Health tips	3	5	3	3	3	5	3
Taking part in discussion forums	3	4	2	4	3	3	3
Information on cosmetics	3	2	3	2	3	3	3
Real estate offers	2	4	2	4	2	4	2
Information on medication	2	4	2	3	2	4	2
Telephoning via the Internet	2	4	2	4	2	2	2
	364	468	342	450	348	439	350

SAMPLE: Internet users among the German population, age 14 to 64
SOURCE: *Allensbach Computer and Technology Analysis* (ACTA) 2002

Deep Insights Thanks to the Single-Source Principle

In addition, allow us to add a brief methodological note: the close connections in media usage found here are particularly valid since all of the data derive from the same persons, that is, they were ascertained in line with the single-source principle (in keeping with the philosophy the Allensbach Institute has adhered to for decades when conducting media research). Of course, the single-source principle imposes certain restraints, especially when we want to investigate new criteria pertaining to media usage—without increasing the duration of the interview. It is thus crucial that we keep abreast of the findings of comparative German and international studies, for should these studies discover weak points in the approaches described here, we would necessarily have to alter the existing approaches—which would ultimately lead to progress in media coverage research.

Internet Usage at the Expenses of Print Editions?

Back to the media brands. Even if Internet portals are still not worthwhile in economic terms for many media titles, the audiences of individual media brands have grown considerably thanks to their presence on the Internet—and this without any long-term reductions in coverage for the print editions, which have essentially remained stable over time, or which have even increased, as in the case of weekly current-affairs magazines (Charts 12 and 13).

CHART 12

Coverage of Weekly Current-Affairs Magazines Has Grown in the Last Few Years

Average-issue readership of –	1998	1999	2000	2001	2002	2003	
	%	%	%	%	%	%	Index 1998=100
Stern	11,4	11,7	11,8	12,7	13,6	13,9	122
Der Spiegel	9,1	9,3	9,3	9,8	10,7	10,6	116
Focus	8,2	8,7	8,5	8,1	8,6	8,9	109

SAMPLE: Population 14 and over
SOURCE: *Allensbach Media Market Analyses* (AWA) 1998 - 2003

CHART 13

Media Consumption Trends in 2003

	Coverage in 2003	Change in comparison to the prior year %
Total print media	63,52	-0,1
Magazines and weekly newspapers	61,30	+0,9
National subscription daily newspapers	3,94	-4,7
Regional subscription daily newspapers	38,47	-1,6
Newsstand newspapers, tabloids	13,04	-7,3
Advertisers	42,81	+1,5
Total television	59,64	+0,8
Public TV channels	47,27	+1,2
Major commercial TV channels	40,14	+1,0
Other commercial TV channels	28,98	+0,9
Advertising poster	27,81	+0,9
Internet	13,41	+24,6
The movies, cinema	4,92	-6,2

DEFINITIONS: Print media: average-issue readership; TV: viewers per day; Poster: probability of exposure per day; TV: viewers per day; Poster: probability of exposure per day; Internet: users per day; Cinema: users per week

SAMPLE: Population 14 and over
SOURCE: *Allensbach Media Market Analysis* (AWA) 2003

Internet Users like Media Brands – and Are Opinion Leaders

As mentioned above, readers who use a title's Internet portal continue to be *high-carat* users of the *print* medium. When it comes to media *brands*, Internet users are also particularly receptive to the strong brand image projected by media which are offered as both print and online editions: at a time when people generally no longer identify as strongly with brands as they used to (in 1995, 43 percent of the population believed purchasing brand-name goods was worthwhile, as compared to only 33 percent in 2003), Internet users continue to display an above-average attachment to brands (37 percent, as opposed to 31 percent among non-onliners in 2003; Source: AWA)—and not just in general, but especially with regard to the media. Thus,

- 41 percent of Internet users say *Spiegel* is an *appealing* brand, as compared to only 26 percent of persons who do not use the Internet. The corresponding findings for *Stern* are 40 vs. 31 percent and 45 vs. 31 percent for *Focus*. Furthermore,

- 49 percent of Internet users perceive *Spiegel* as *distinctive, unique*, while only 37 percent of those who do not use the Internet say the same. Similar findings are obtained for *Stern* (39 vs. 32 percent) and *Focus* (40 vs. 31 percent).

- This, however, by no means applies only to weekly magazines; rather, similar discrepancies are also found for titles that belong to completely different magazine genres (e.g. *Men's Health*, *Playboy*, *Geo*, *TV-Spielfilm*—Source: Fame Study, 2000), as shown by the findings documented in Chart 14.

CHART 14

Internet Users Like Media Brands

Persons who feel this title is -	"appealing"		"distinctive, unique"	
	Online users %	Not online %	Online users %	Not online %
Focus	45	31	40	31
Der Spiegel	41	26	49	37
Stern	40	31	39	33
Geo	48	26	47	26
Auto Motor und Sport	24	15	18	12
TV Spielfilm	24	12	14	8
Playboy	24	12	44	27
Men's Health	8	2	8	2

SAMPLE: Population 14 and over
SOURCE: FAME 2000

Internet users thus represent a particularly amenable audience when it comes to strengthening media brands—not least by virtue of the above-average influence they exert on others in their social surroundings (36 percent of Internet users are opinion leaders, as compared to 23 percent of persons who are not online — Source: AWA 2003).