

LA ELFA 12/13

LESERANALYSE ELEKTRONIK-FACHMEDIEN



**Market communications for
decision-makers in electronics in Germany:
Summary of the
LA ELFA 12/13 results**

About LA ELFA

The aim of the LA ELFA 12/13 readership analysis electronics trade press is to ascertain the personnel universe of target groups in professional electronics. Furthermore, valid data can be obtained about information behaviour, media use as well as target group and investment potential in professional electronics. Among other things, the coverage of electronics trade press titles in Germany is determined. As a first step, companies and persons, who were relevant for the main interview, were determined under a screening procedure (4,266 screening interviews).

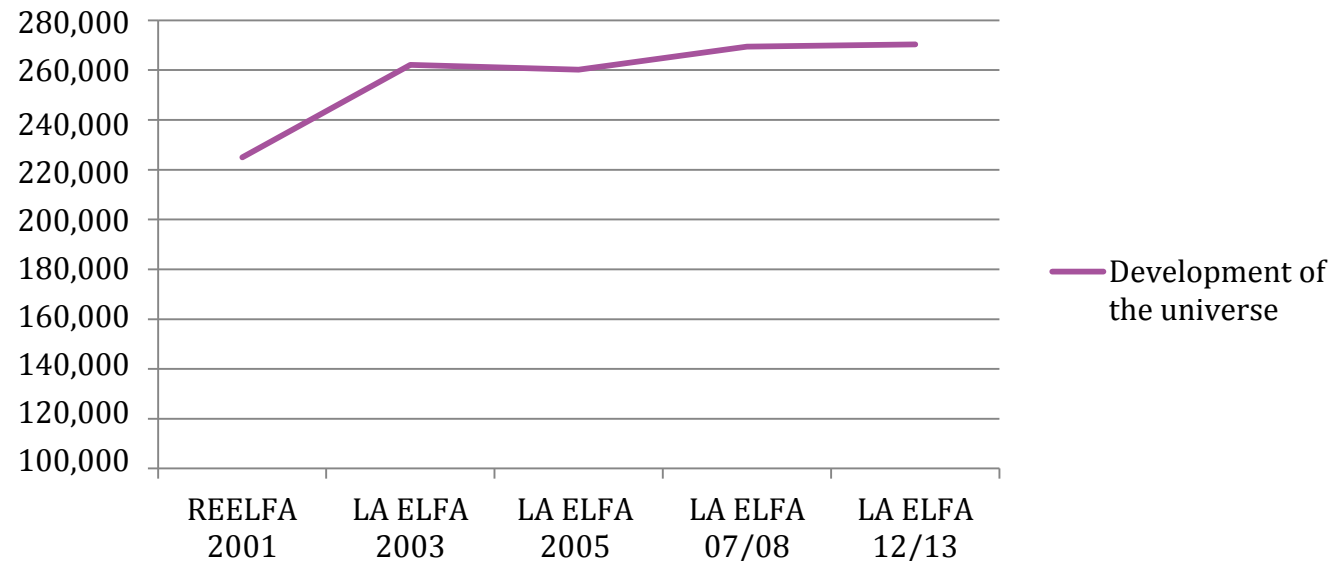
In a second step, the 751 main interviews were conducted with the target persons.

A summary of the survey methodology may be found on the last page of this report.

For the fifth time since 2001, this survey provides objective transparency concerning electronics trade press and other information channels. LA ELFA 12/13 was scientifically and methodologically supported by the Technical University of Munich. The fieldwork was carried out by the IFAK Institute in Taunusstein which has a wide experience with cross-media studies.

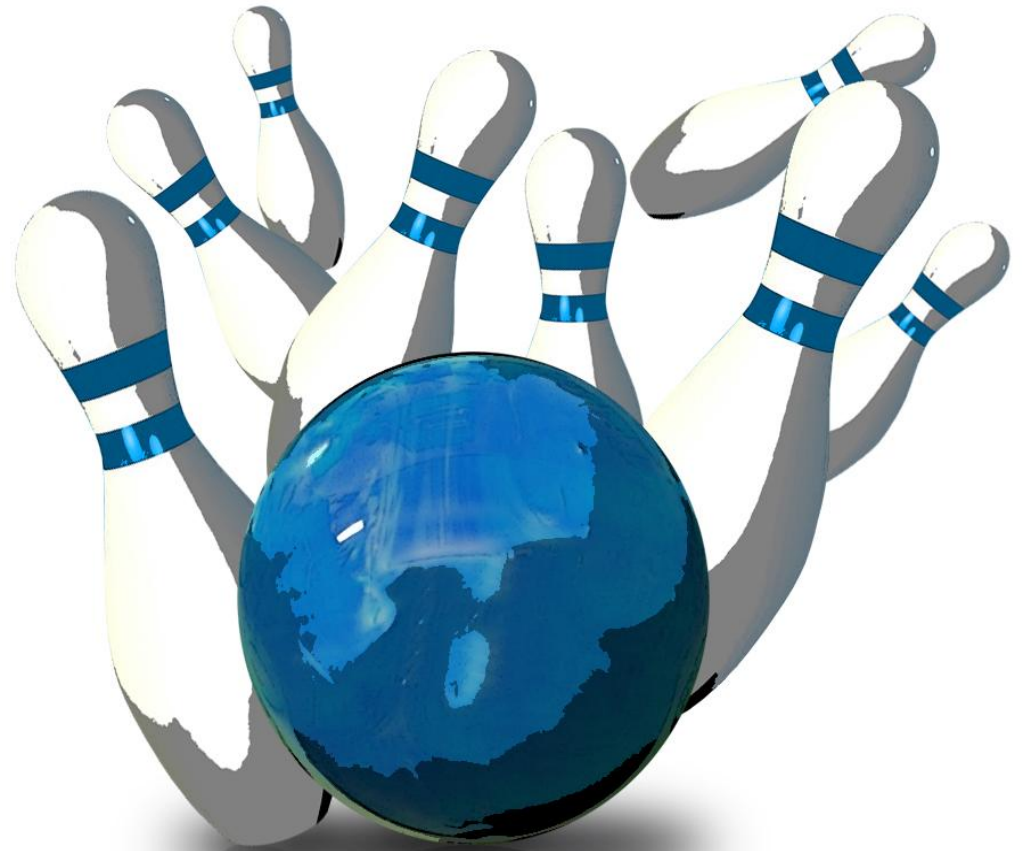
In the current LA ELFA 12/13 study, the universe of decision-makers in electronics (270,300) has remained stable compared to the last survey.

Stable universe of decision-makers in electronics in Germany



Socio-demographic data of electronics decision-makers in Germany

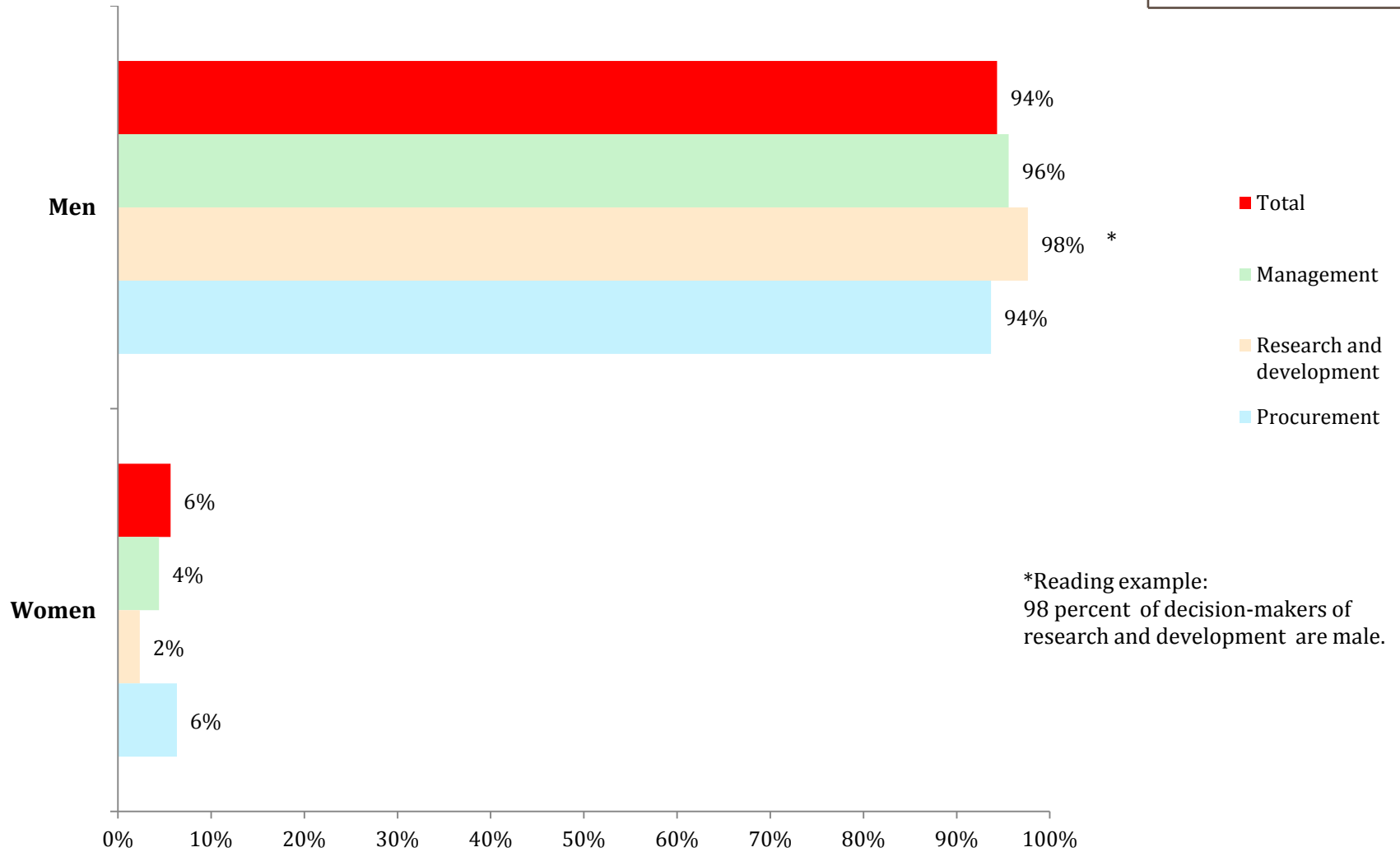
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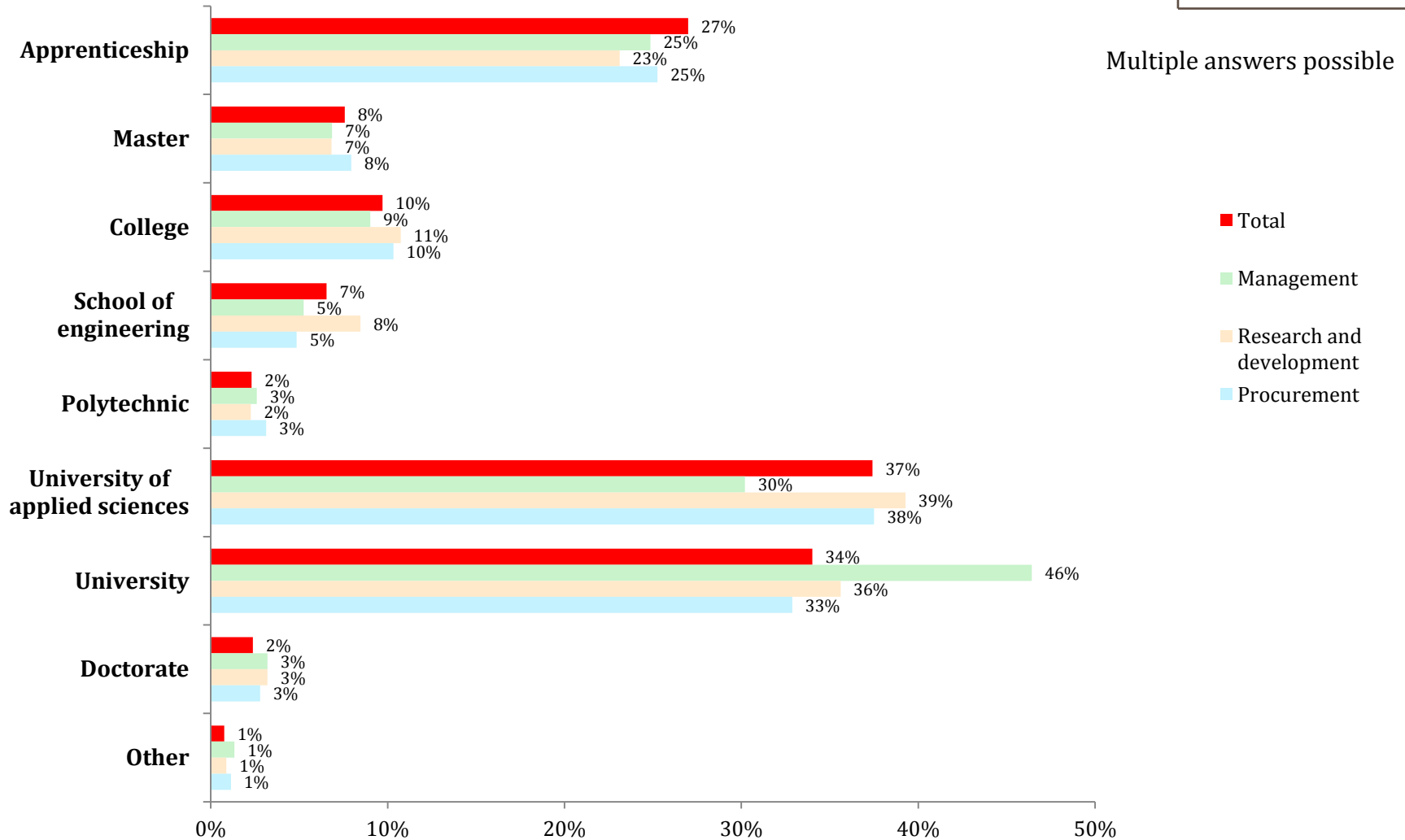
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Gender

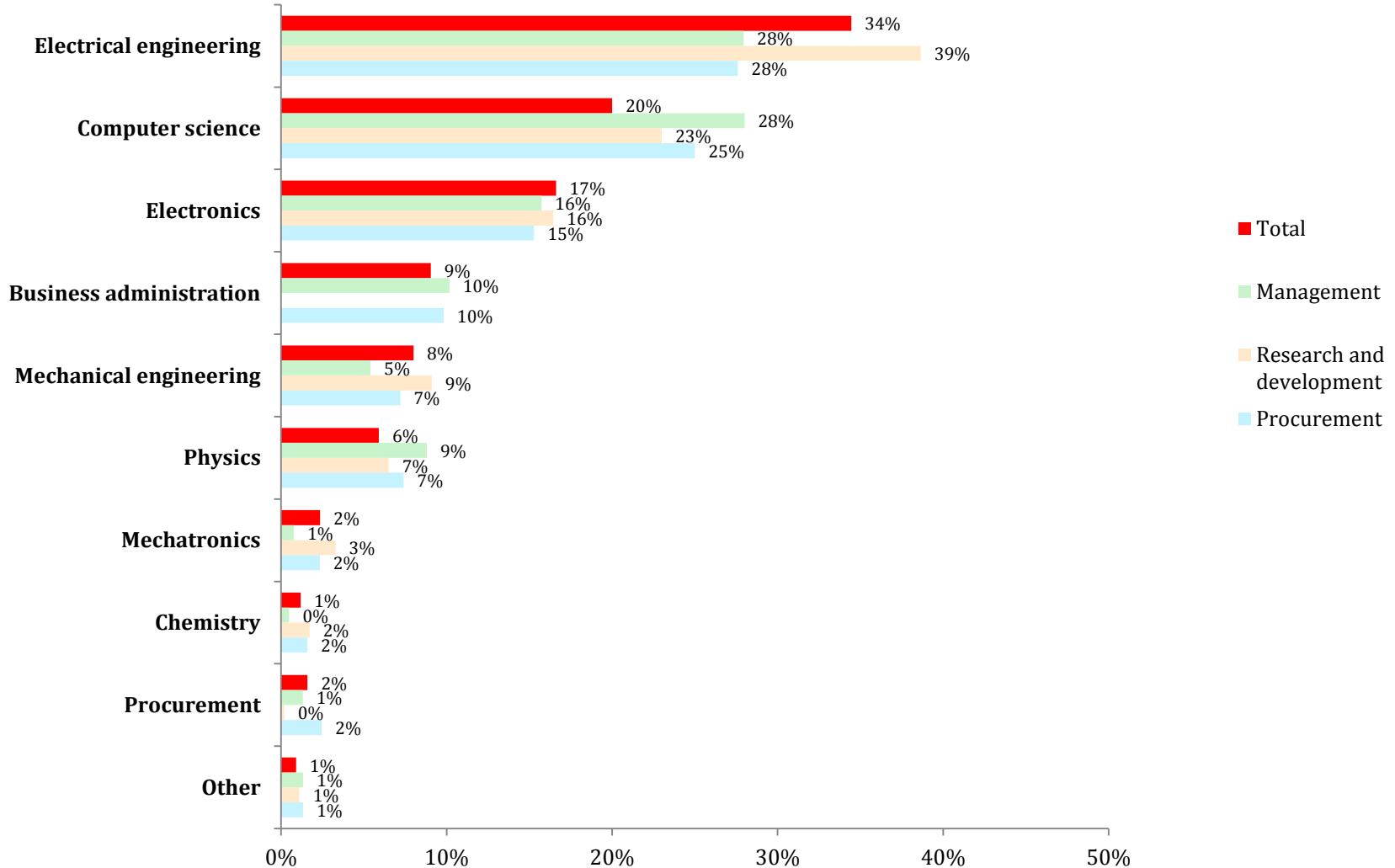


*Reading example:
98 percent of decision-makers of research and development are male.

Education and training

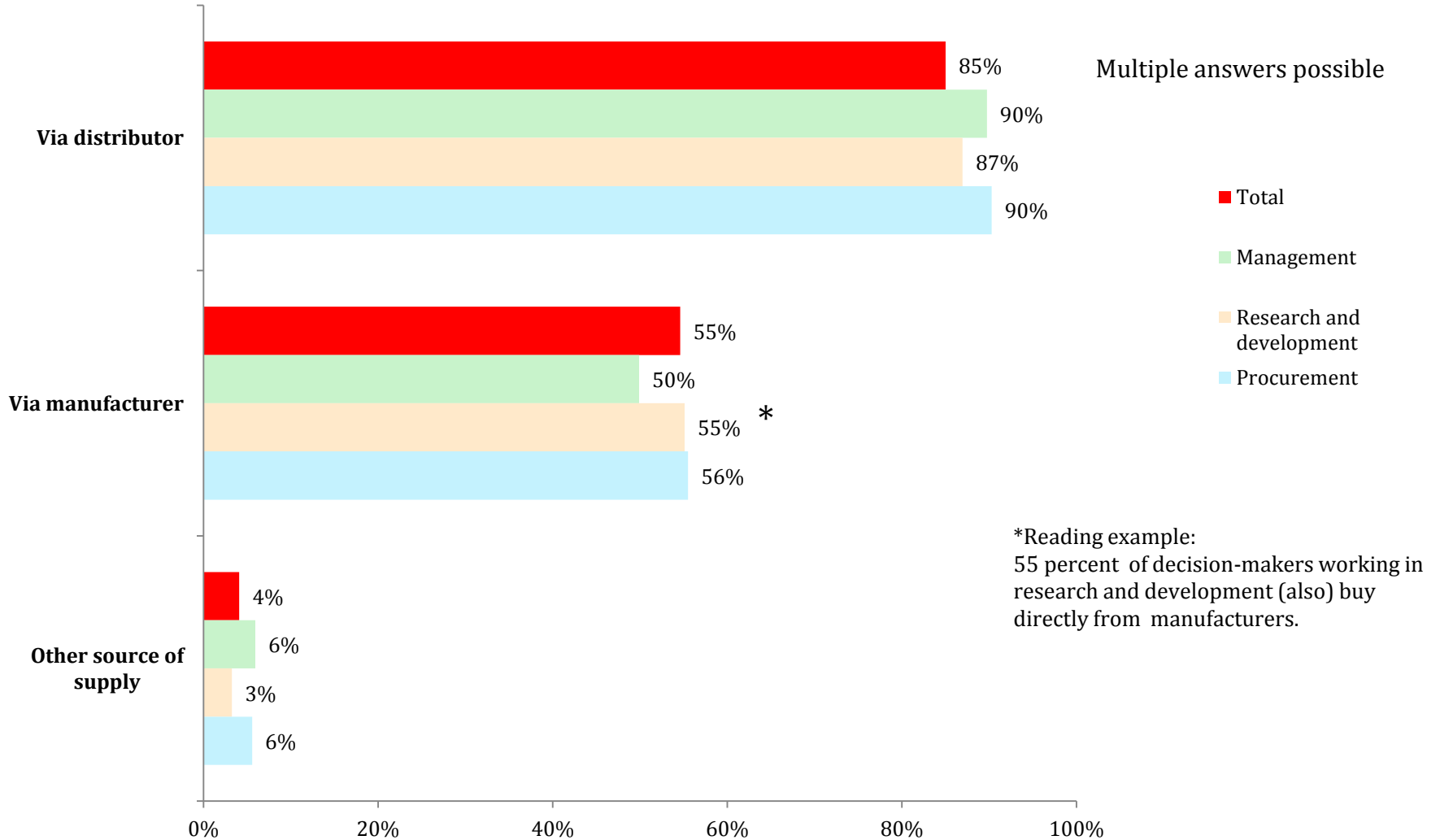


Subject area



Base: 270,300 decision-makers of which: Management: 121,400, Research and development: 184,900, Procurement: 156,700

Purchase of electronic products



Professional media use in general

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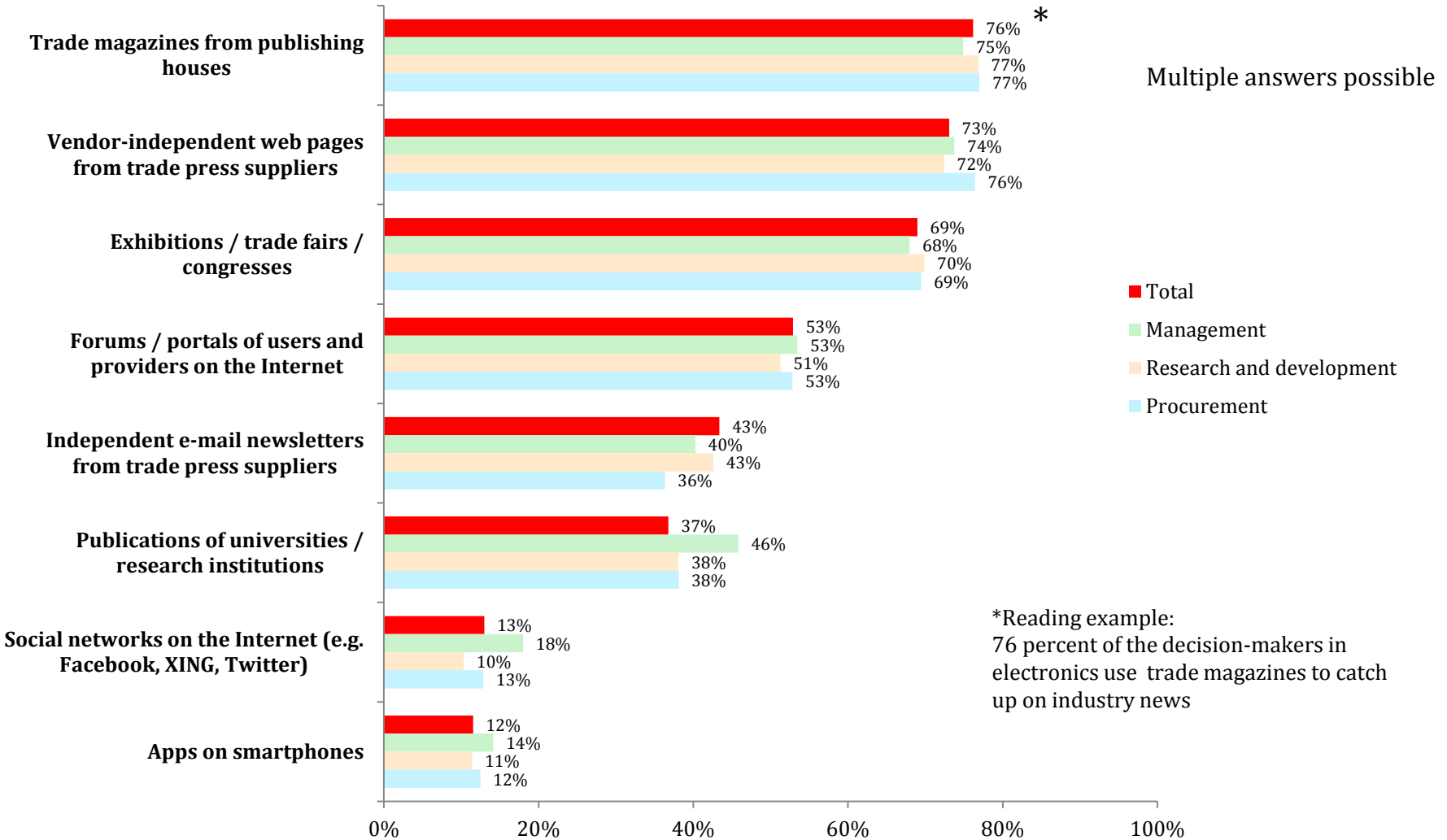


Use of social networks

		Total	Management	Research and development	Procurement
Facebook	Private use	28.0%	23.4%	24.9%	29.1%
	Private and professional use	* 8.2%	10.8%	6.0%	8.9%
	Professional use	1.1%	1.2%	0.5%	1.3%
	No use	62.8%	64.6%	68.6%	60.7%
XING	Private use	5.9%	5.2%	6.3%	7.7%
	Private and professional use	12.0%	9.4%	9.6%	9.1%
	Professional use	17.9%	26.6%	17.3%	18.9%
	No use	64.2%	58.9%	66.8%	64.2%
Linked In	Private use	3.0%	2.8%	2.8%	3.5%
	Private and professional use	4.9%	5.8%	3.7%	4.0%
	Professional use	8.3%	10.3%	7.2%	7.5%
	No use	83.8%	81.1%	86.4%	85.0%
StudiVZ	Private use	3.7%	2.4%	4.2%	4.7%
	Private and professional use	0.3%		0.4%	0.3%
	Professional use	1.1%	1.3%	0.7%	1.2%
	No use	94.8%	96.2%	94.7%	93.8%
MeinVZ	Private use	2.0%	0.6%	1.7%	2.8%
	Private and professional use	0.1%		0.1%	
	Professional use	0.6%	1.1%	0.7%	1.0%
	No use	97.3%	98.3%	97.4%	96.2%
Twitter	Private use	2.9%	3.1%	3.4%	3.5%
	Private and professional use	1.3%	1.2%	0.0%	0.7%
	Professional use	2.5%	3.7%	1.8%	2.7%
	No use	93.3%	92.0%	94.8%	93.2%
Google+	Private use	4.4%	3.7%	5.2%	4.1%
	Private and professional use	20.1%	24.1%	18.9%	20.6%
	Professional use	3.9%	4.0%	3.7%	5.7%
	No use	71.6%	68.2%	72.1%	69.7%
Plaxo	Private use	0.1%		0.1%	
	Private and professional use	0.7%	1.6%	1.1%	0.6%
	Professional use	0.3%	0.6%	0.2%	0.3%
	No use	98.9%	97.8%	98.6%	99.1%

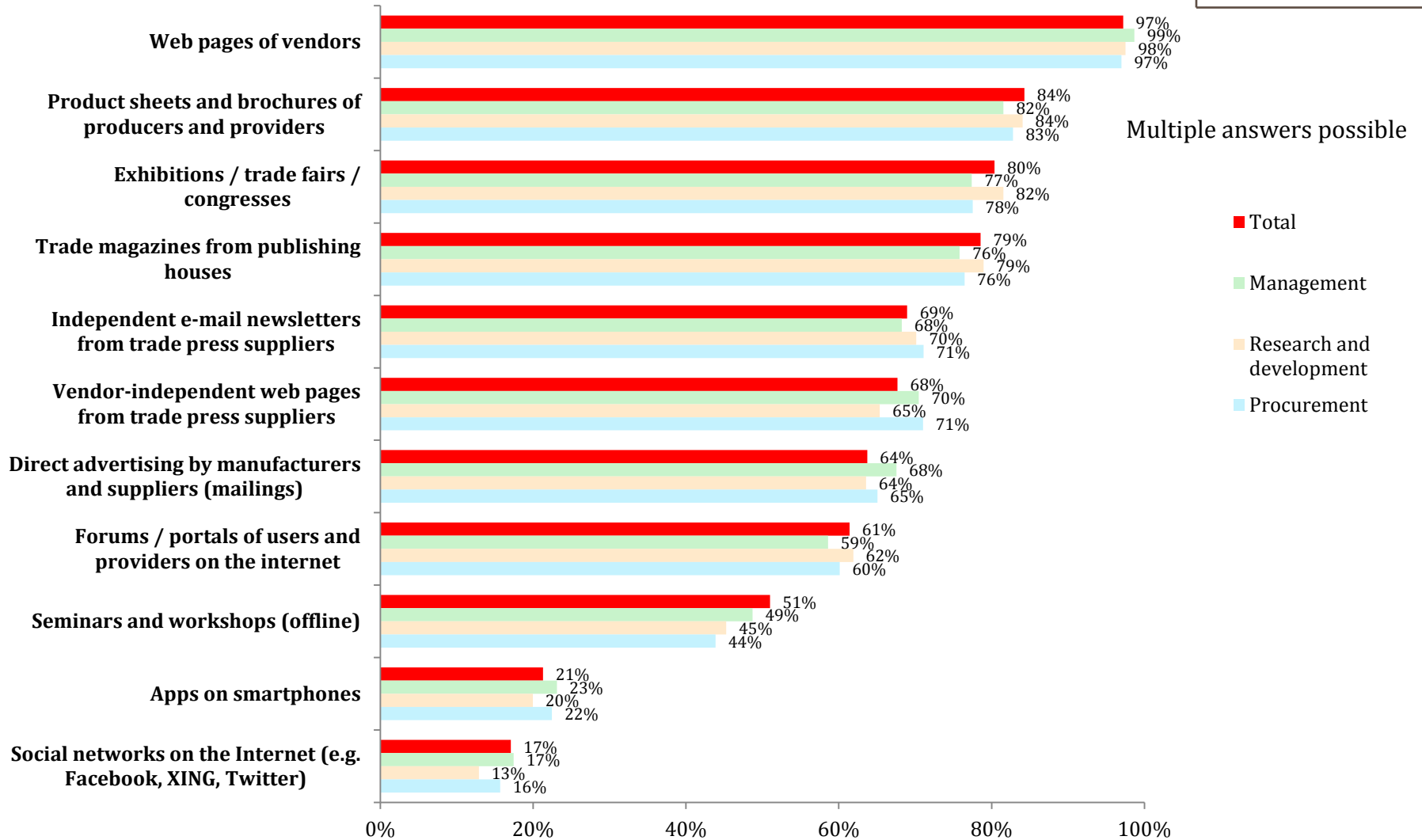
*Reading example:
9 percent of decision-makers use facebook for professional purpose. Only 1 percent of them use it exclusively for professional purpose.

Selection: Use of information sources for industry information



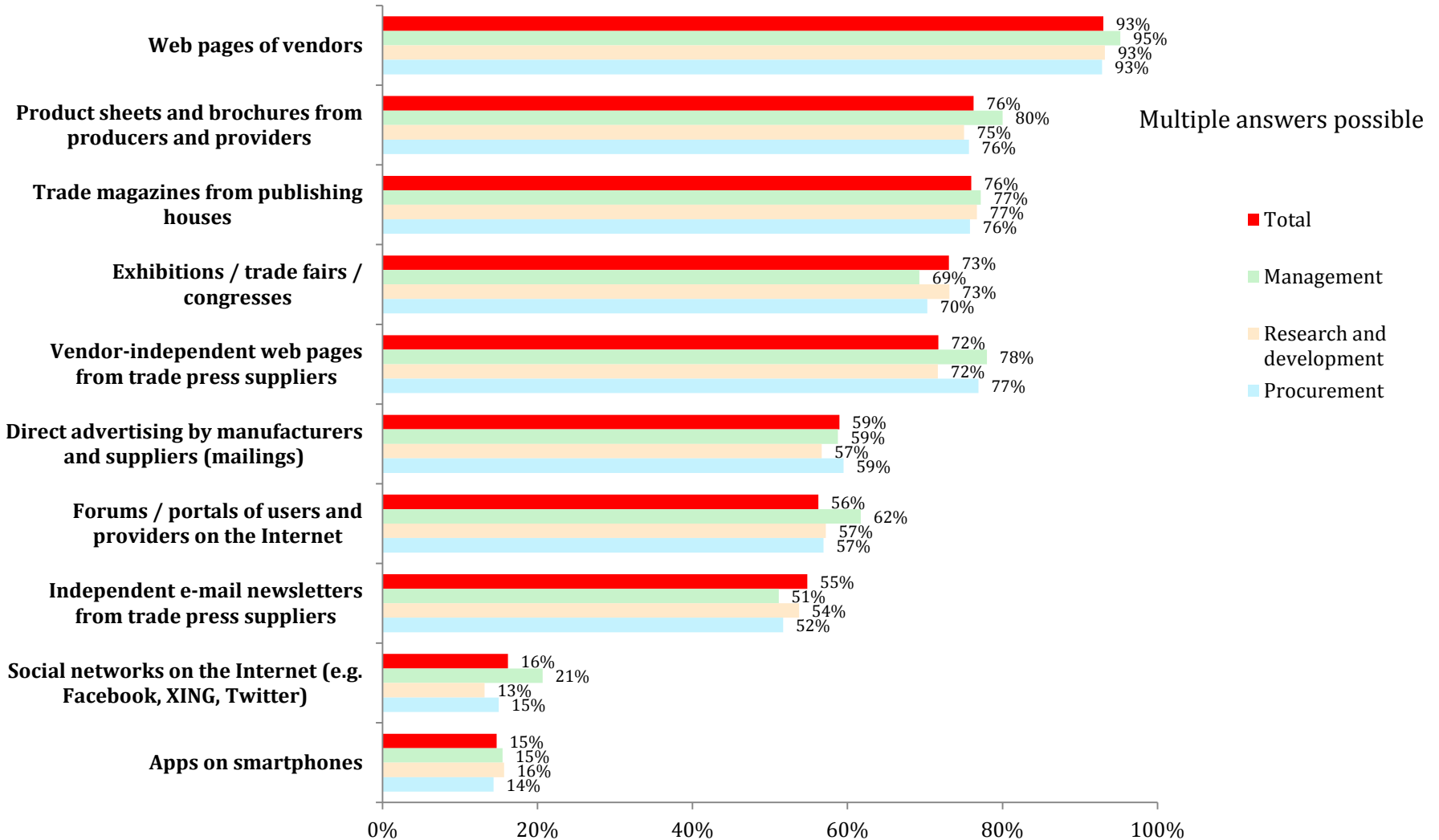
Base: 270,300 decision-makers of which: Management: 121,400, Research and development: 184,900, Procurement: 156,700

Selection: Use of information sources on (new) products



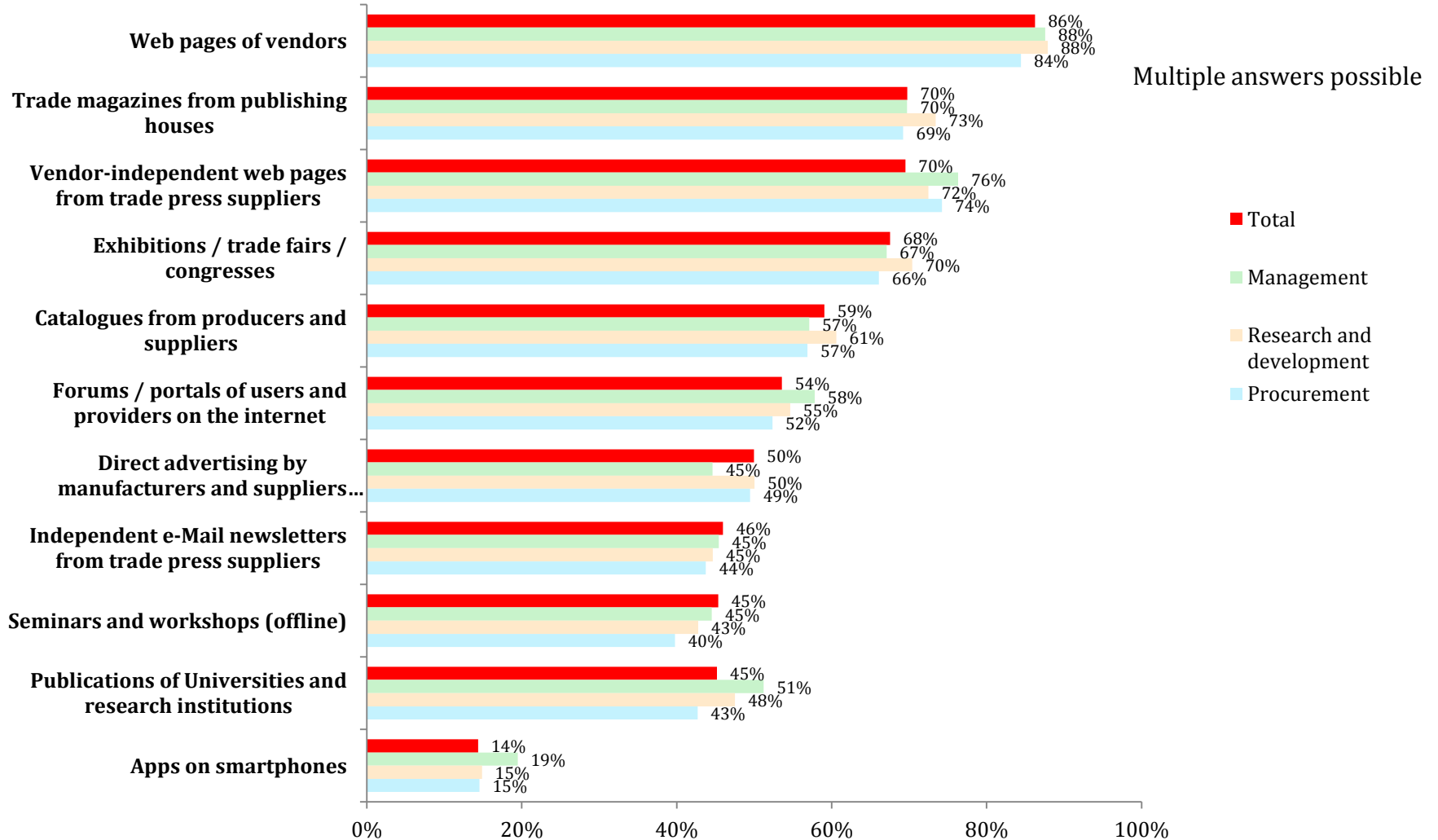
Base: 270,300 decision-makers of which: Management: 121,400, Research and development: 184,900, Procurement: 156,700

Selection: Use of information sources on suppliers



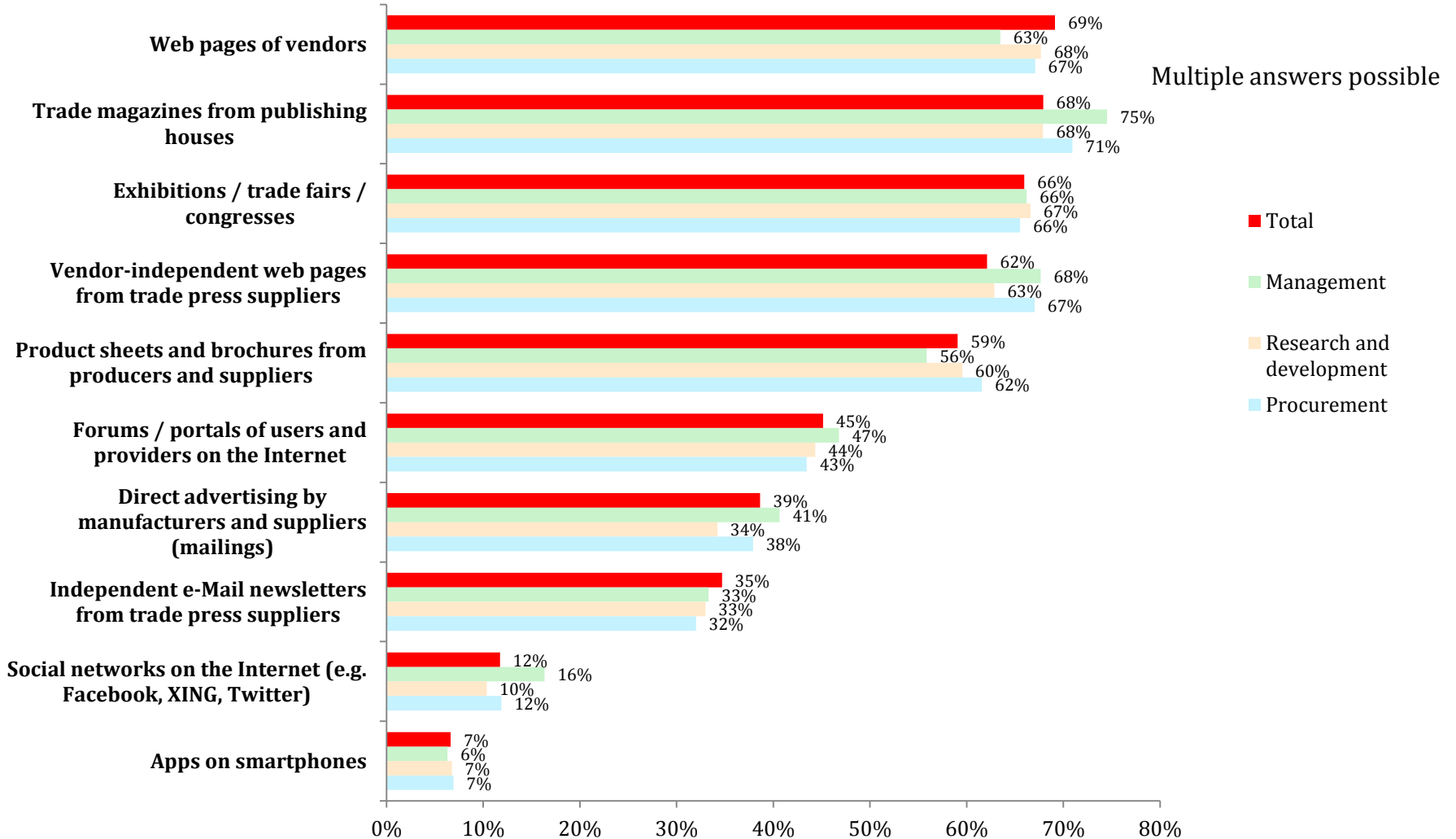
Base: 270,300 decision-makers of which: Management: 121,400, Research and development: 184,900, Procurement: 156,700

Selection: Use of information sources on technical solutions

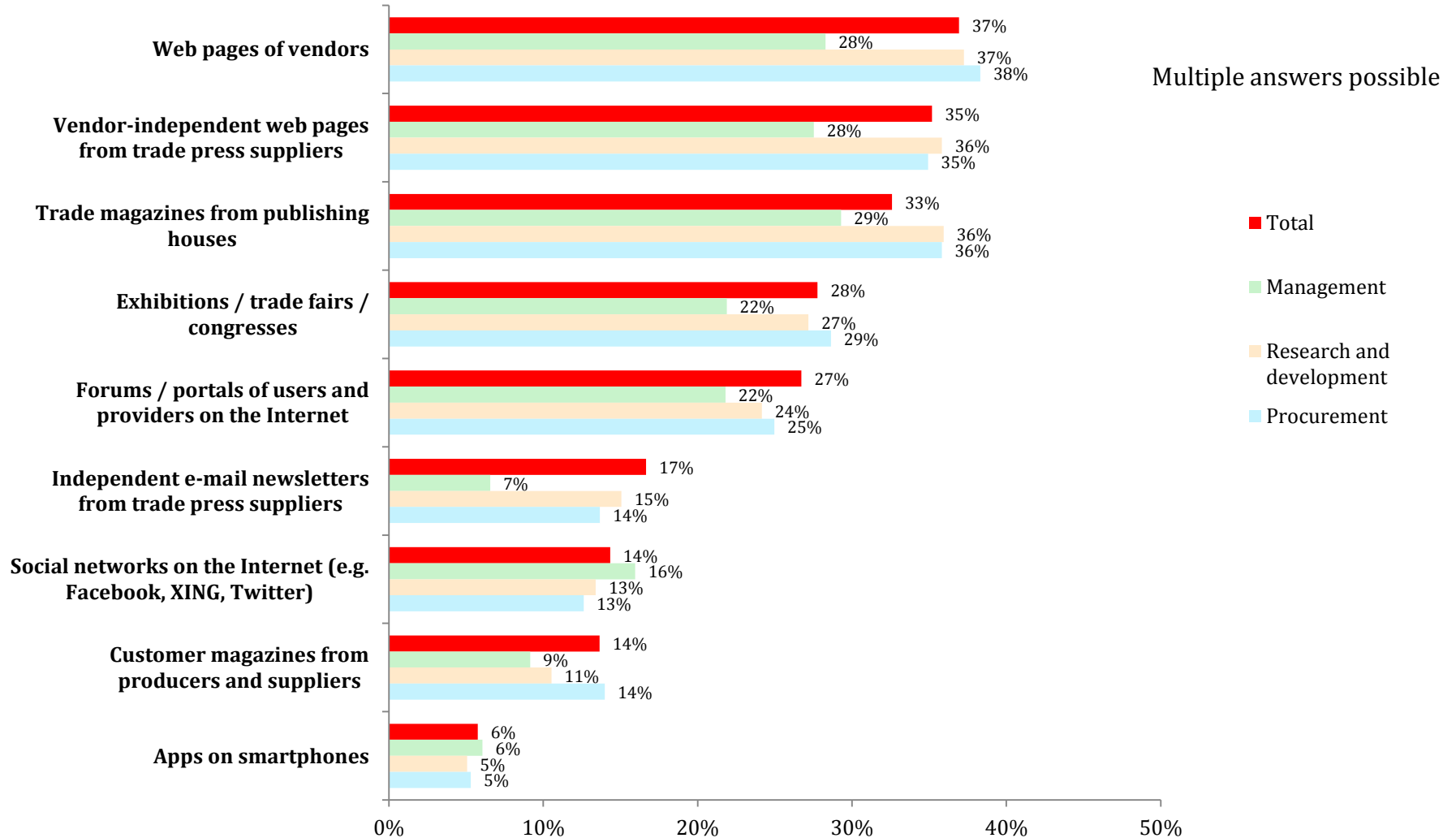


Base: 270,300 decision-makers of which: Management: 121,400, Research and development: 184,900, Procurement: 156,700

Selection: Use of information sources for the observation of competitors

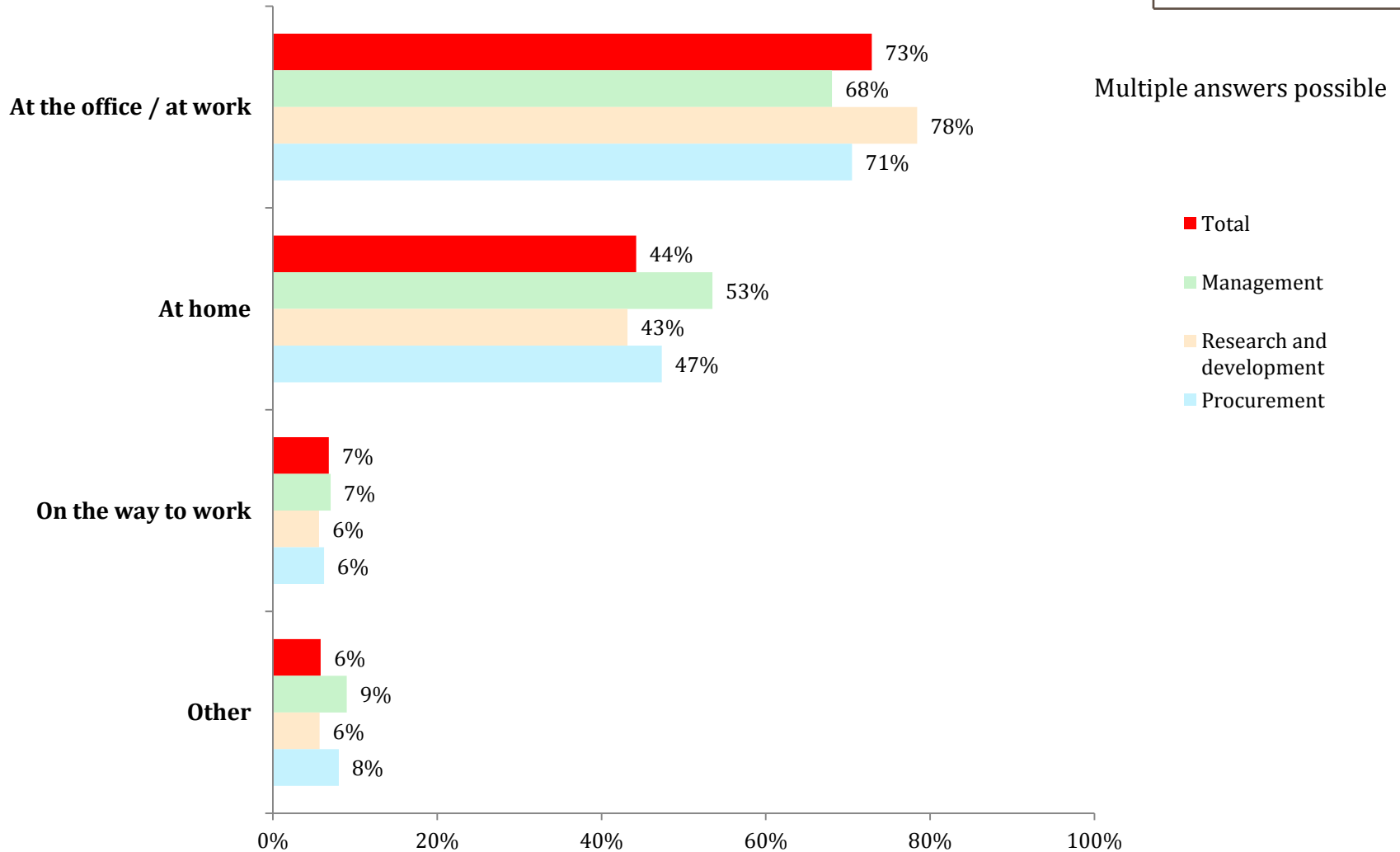


Selection: Use of information sources on job offers

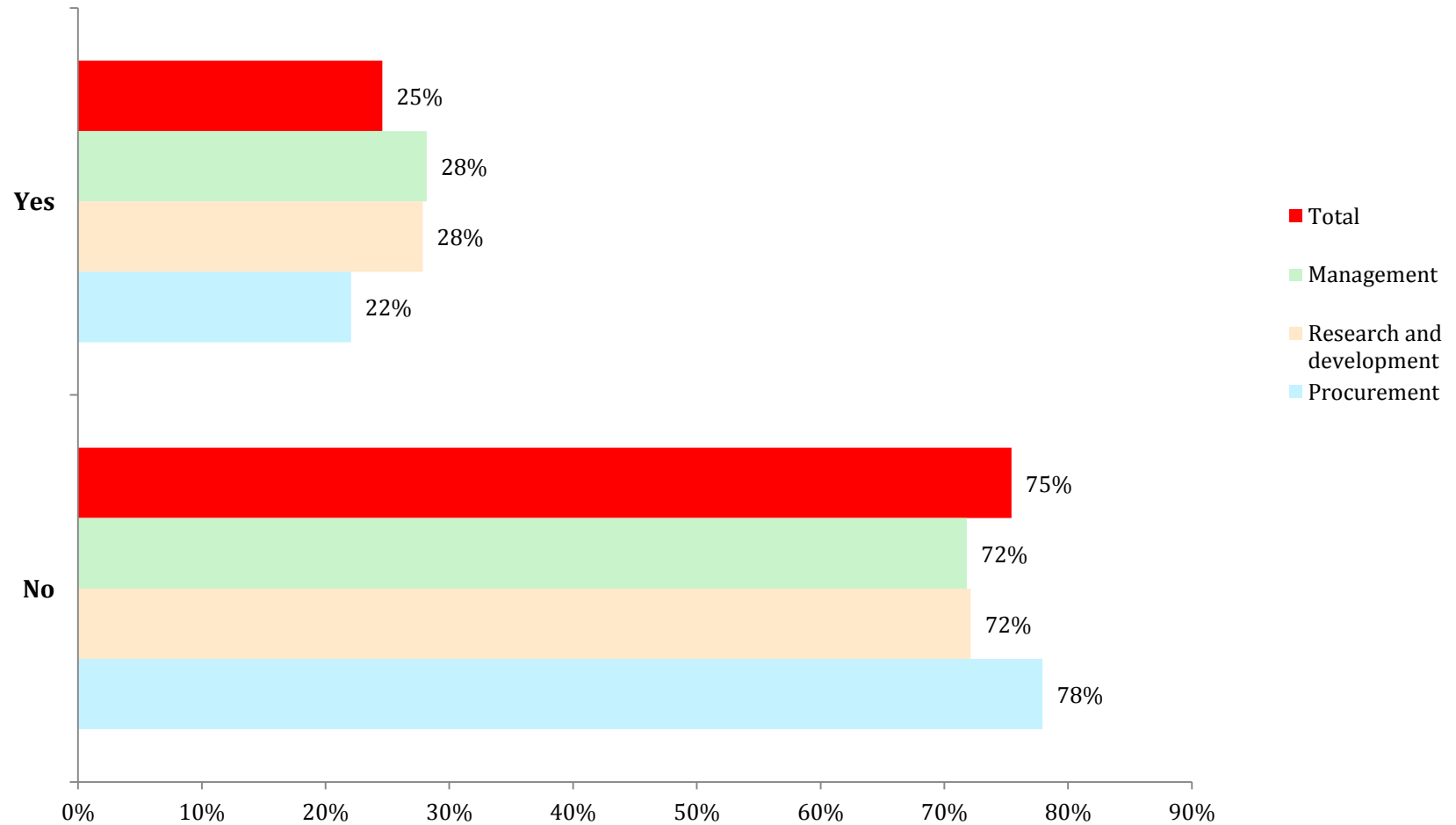


Base: 270,300 decision-makers of which: Management: 121,400, Research and development: 184,900, Procurement: 156,700

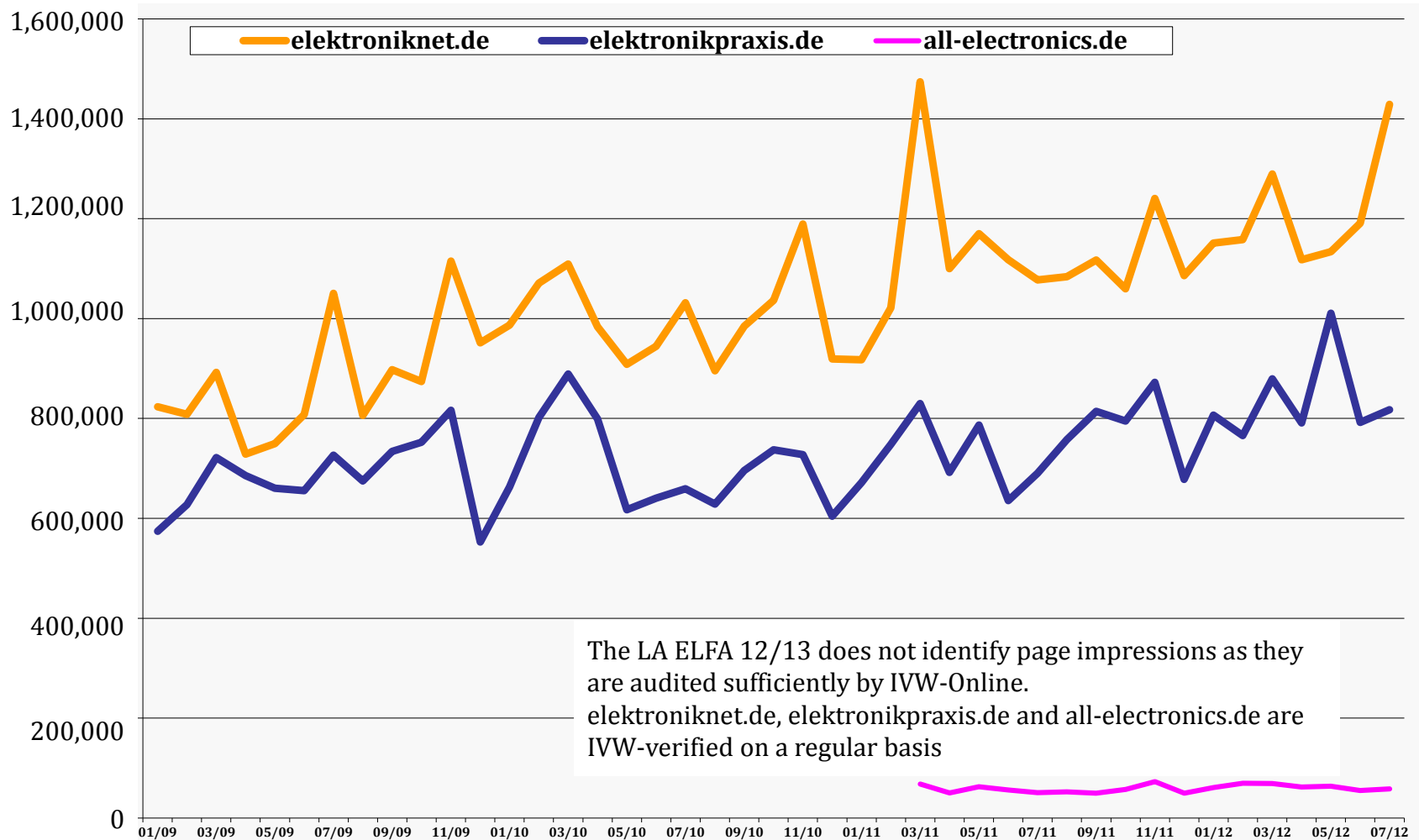
Reading places



Use of non-German articles



Page Impressions in comparison (according to IVW-Online)



The LA ELFA 12/13 does not identify page impressions as they are audited sufficiently by IVW-Online. elektroniknet.de, elektronikpraxis.de and all-electronics.de are IVW-verified on a regular basis

Summary

The number of decision-makers in electronics as well as print coverage remain stable

In the current LA ELFA 12/13 study, the universe of decision-makers in electronics (270,300) has remained stable compared to the last survey. Also the print coverage of the big electronics media titles continues to be high. The electronics media with the biggest advertising volume (advertising media statistics mediaskop 2011) reach the highest coverage: Markt&Technik and Elektronik are ahead with Markt&Technik reaching an average of 108,800 readers week per week and Elektronik reaching 96,000 readers per issue every 14 days.

Hardly any other sub target group within the decision-makers in electronics is so highly coveted as the one of design engineers. In the field of research and development, Elektronik reaches the highest coverage, followed by the weekly magazine Markt&Technik.

The supply of media continues to increase

Altogether, the supply of media continued to grow in the last years. Social media in the B-to-B communications with target groups out of technology and development play only a subordinate role, as several general reports such as the VDMA coverage study demonstrate.

According to LA ELFA 12/13, this also applies to decision-makers in electronics. For them, Facebook & Co. do not play a decisive role in professional information supply. Web sites of vendors and providers for specialised media, exhibitions and specialist journals are more often used by decision-makers to obtain relevant information.

Facebook with low professional benefit

Precisely in the case of the demanding target group of decision-makers in electronics, the professional benefit is the main objective in terms of media selection. This professional benefit doesn't seem to be offered on Facebook to the greatest extent. Only nine percent of the decision-makers in electronics use Facebook for professional purpose. The proportion of decision-makers in research and development is even smaller: Here it is only six percent.

More than two thirds of the developers don't use Facebook at all, neither for private nor for professional purpose.

Besides, Twitter is only used by five percent of the developers overall.

Free metering

The media evaluation tool MDS of Axel Springer publishing house is available as it also was with the prior LA ELFA studies. Advertisers and interested parties, who wish to receive calculations e.g. on the size of target groups, purchase intentions, coverages and economic efficiency of electronics trade journals based on the results of the study, can use this service for free.

Contact and further information on LA ELFA 12/13:

Stephanie Jarnig
 Market research, WEKA FACHMEDIEN GmbH
 Richard-Reitzner-Allee 2
 85540 Haar
 sjarnig@la-elfa.org
 Tel. +49(0)89/25556-1712
 www.la-elfa.org



Summary of the survey methodology for the coverage analysis (AMF 3-R)



1 Name of the coverage study:

LA ELFA 12/13 readership analysis of electronics trade media is conducted on behalf of WEKA FACHMEDIEN GmbH. Overall control was entrusted to the Technical University of Munich.

A total of 8 titles were raised in the demanded systematic approach in accordance with the official guidelines for media analysis from the German Advertising Federation ZAW (7 titles have been evaluated, one title did not fulfil the systematic and objectively defined criteria of the title selection).

2 Definition of the universe:

2.1 Universe:

a) Institutions/companies:

All companies of the Federal Republic of Germany belonging to electronics industries have been defined as institutional universe.

b) Persons:

The target persons are people who deal with electronics and at least participate in decision making.

Are there any employees or departments in your company who deal with components of professional electronics?

For example:

production of electronic components

production of devices with electronic components

design of electronic and electrotechnical components

planning/conception of applications with those components

distribution/trade/purchase in the industrial area with those components

The general provision of support for the company's network equipment and telecommunications equipment or the simple distribution of finished devices to retail customers are not taken into account.

In the second step the term "decision maker" is defined:

How many decision makers are there amongst the employees who deal with electronics as described above? A decision maker is any person who plays a decisive role in decision making. Apart from those who take the final decision this contains also persons within a team who are involved in a decision in terms of planning or consulting.

Both decisions of technical nature (selection of components, manufacturers, technical solutions) and commercial decisions (selection of suppliers etc. also according to specifications) are meant here.

2.2 Structure of the universe:

According to the Federal Statistical Office of Germany (sales tax statistics 2010 as published in March 2012) the universe covers 162,384 companies from sectors with WZ08-codes: 20, 26.11, 26.2, 26.3, 26.4, 26.5, 26.6, 26.7, 27, 28, 29, 30, 32.5, 46.52, 47.41, 61, 62, 63.1, 71.2 und 72.1.

The number of electronics decision makers in these sectors has been determined empirically. The study represents 270.300 decision makers.

3 Research methodology

As there are no documents regarding the number or distribution of the target persons' universe within their companies the personnel universe was to be determined at first. The number of electronics decision makers within the respective companies was identified by screening interviews via telephone.

Within a department relevant for the survey a target person was selected randomly for the main interview by telephone.

To avoid confusion regarding the titles title cards could be consulted on a secured part of the IFAK website. Cover pages were rearranged differently for each respondent.

As an alternative to the visualization on the internet titles could also be identified by (printed) title cards sent to the persons interviewed. Those title cards had a DIN-A7 size and were sent in variable sequences. The quality and presentation did not differ in either alternative. Additional interviews could be conducted within companies with more than 5 decision makers in order to consider the lower chances of a target person to be selected within bigger companies.

Both the screening and the main interview were carried out by the quota method. Screeners had to consider the structures of industry and sales based on the data of the Federal Statistical Office. Main interviews were based on the quota guidelines defining the structure of the number of decision makers and industry which was determined during the screening.

In order to better map the slightly occupied parts more interviews have been realized in these areas. Afterwards this deliberately created disproportionality was adapted to the predefined structures by the subsequent proportionalization.

4 Manner and preparation of the sample:

The data for the sample were taken from the provider D&B Germany GmbH. After postal sorting at random of the current database the sample procedure was conducted by D&B. The WZ08-codes and 3 sales categories served as specifications. Subsequently the sample was analyzed for duplicates and fully cleaned.

5 Day of the sampling procedure:

The sampling procedure took place on June 18th, 2012.

6 Sample fulfillment:

To be omitted because of the application of the quota method. A total of 4,266 screening interviews and 751 main interviews were conducted.

7 Period of survey:

The survey took place from June 20th to September 21st, 2012.

8 Conduct of investigation:

IFAK Institute GmbH & Co. KG, Taunusstein was in charge of conduct, fieldwork and technical preparation of the data. The Technical University of Munich is responsible for the scientific and methodological supervision. The survey refers in composition, realisation, coverage and reporting to the official guidelines for media analysis from the German Advertising Federation (ZAW).