

NEWCOM HORIZONS

TOGETHER WE GO FURTHER

**ANALISIS DEL
MERCADO ALEMÁN**



- COUNTRY SCENE GERMANY
- MEDIA INSIGHTS
- TV MARKET
- PRINT & DIGITAL MARKET
- CONCLUSIONES



European country profiles.



Germany is No. 1 in the Europe economy rank



Europe economy
rank

#1

#2

#3

#4

#5

#6

#7

#8

#10

Growth rate

+2,5%

+1,7%

+2,3%

+1,5%

+3,0%

+2,9%

+1,7%

+1,7%

+3,0%

Unemployment
rate

3,8%

4,4%

9,4%

11,3%

17,2%

4,9%

7,1%

3,2%

5,5%

1st economy in Europe

Low unemployment rate

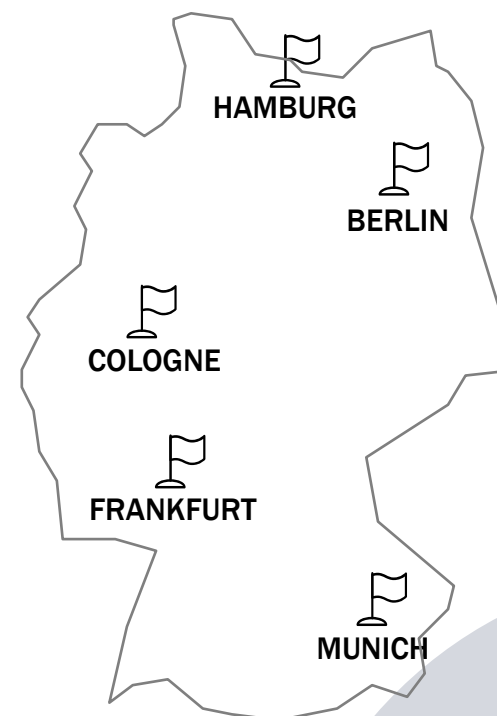
Positive growth rate

Scattered Geography with a federation of 16 states: 3 cities >1m inhabitants
Berlin is by far the biggest city



GERMANY

Top 5 cities	
Berlin	3 426 354
Hamburg	1 739 117
Munich	1 260 391
Cologne	963 395
Frankfurt	650 000



Revenue repatriation of the population

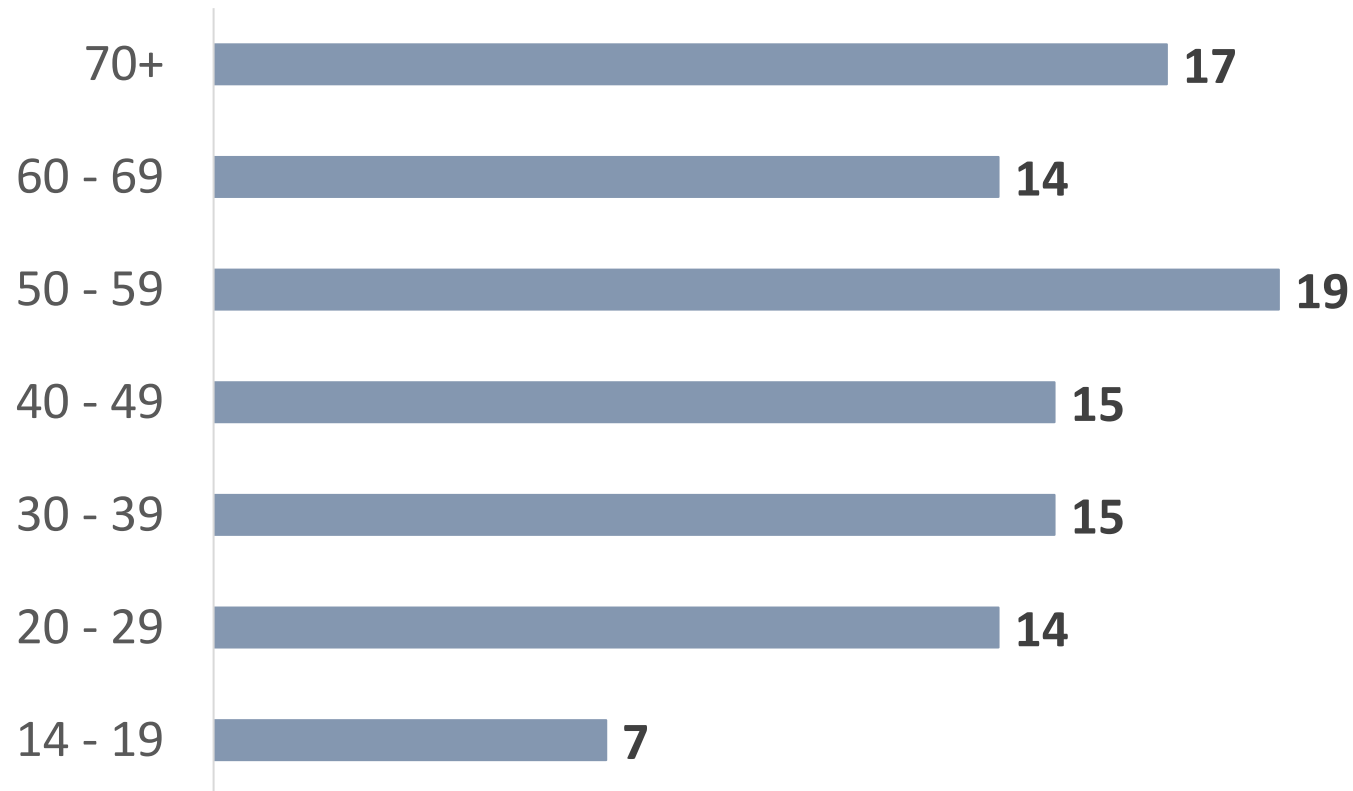
Household net income: €3 399 net/month

Median net equivalised income: €21 920 year

Minimum wage: €9.19 per hour

AGE STRUCTURE IN %, AS OF AGE 14+

65% OF GERMAN POPULATION IS OLDER THAN 40

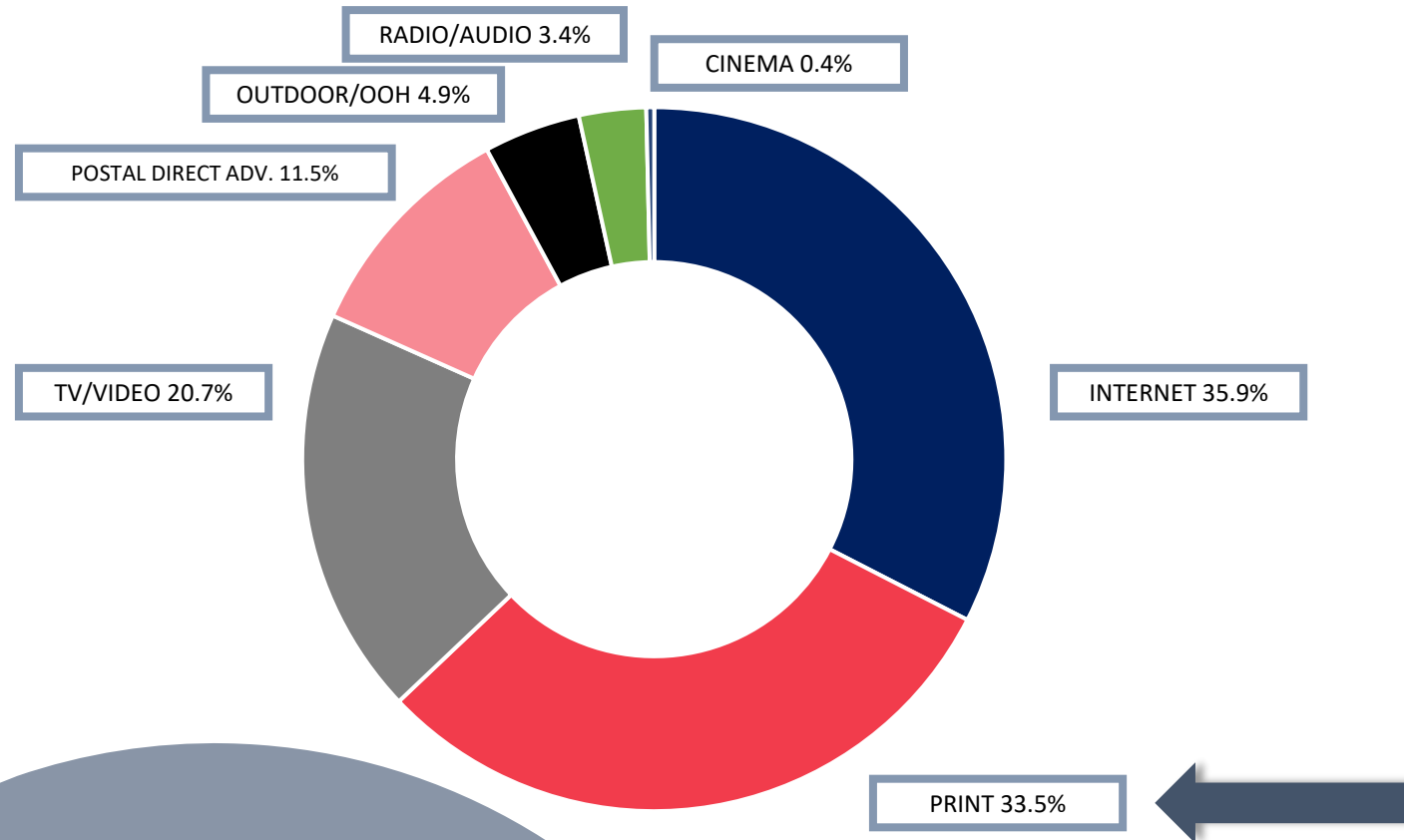




MEDIA INSIGHTS

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2019: PRINT STILL PLAYS A SIGNIFICANT ROLE



Total Net Media Advertising
Expenditure 2019:

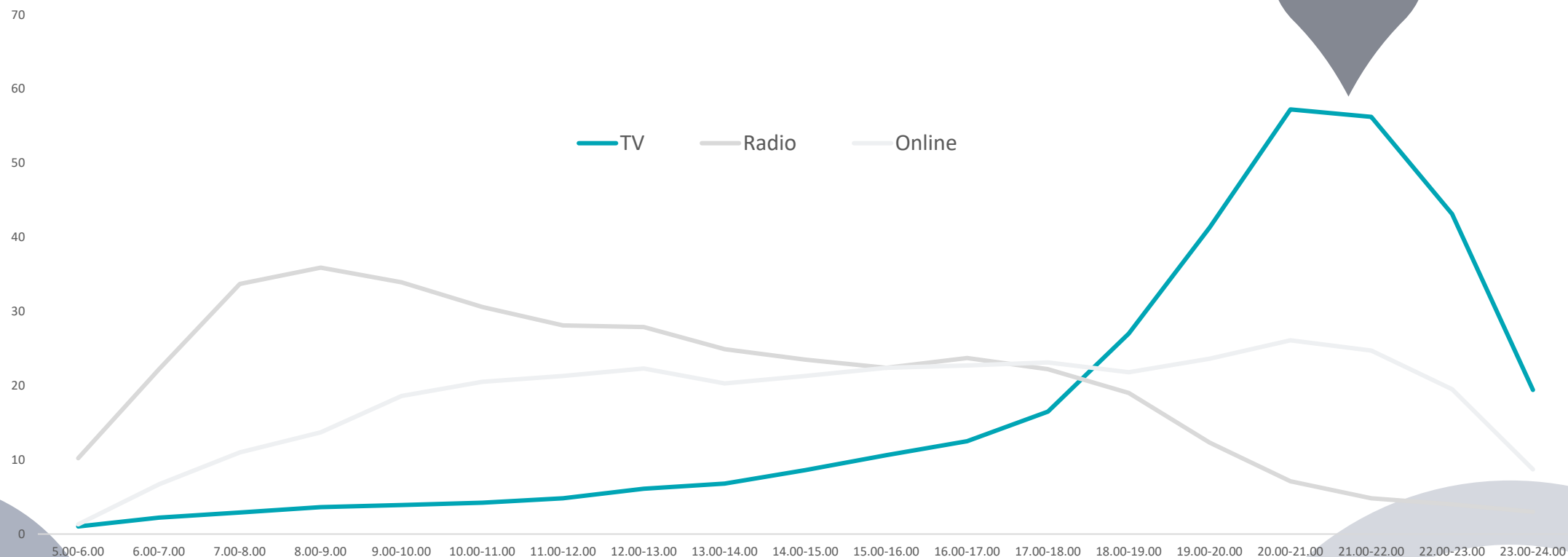
25.01 billion EUR

+0.2%
compared to the previous year

*Source: ZAW (Zentralverband der deutschen Werbewirtschaft = German Advertising Federation) 2020 (Internet including search).

TV is mostly consumed in the evening, online usage is stable over the day

German-speaking population 14+

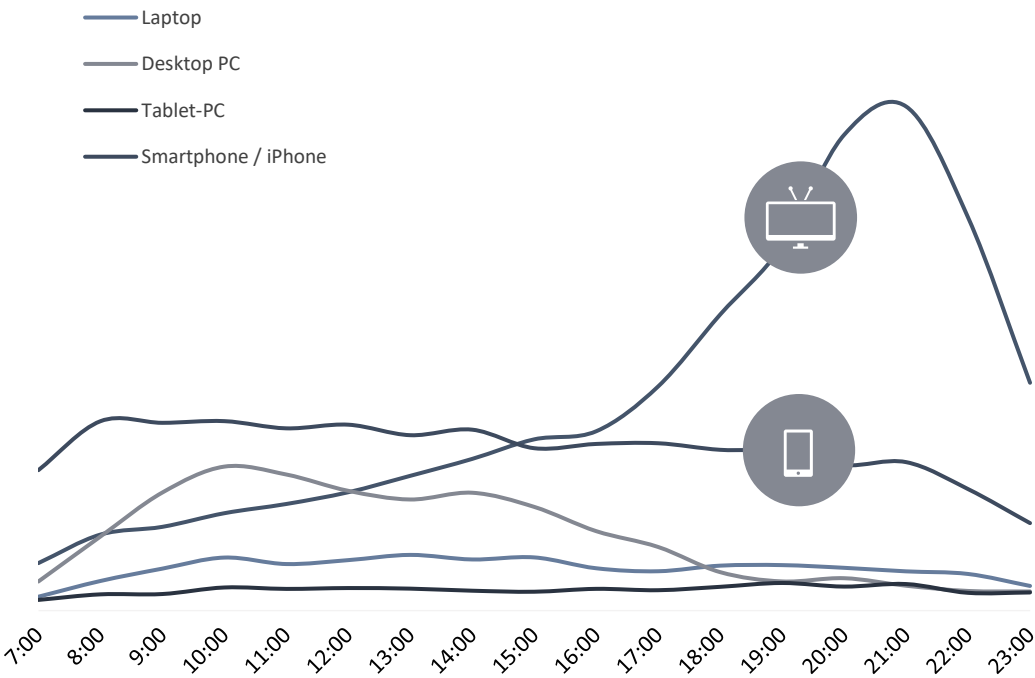


56,2%

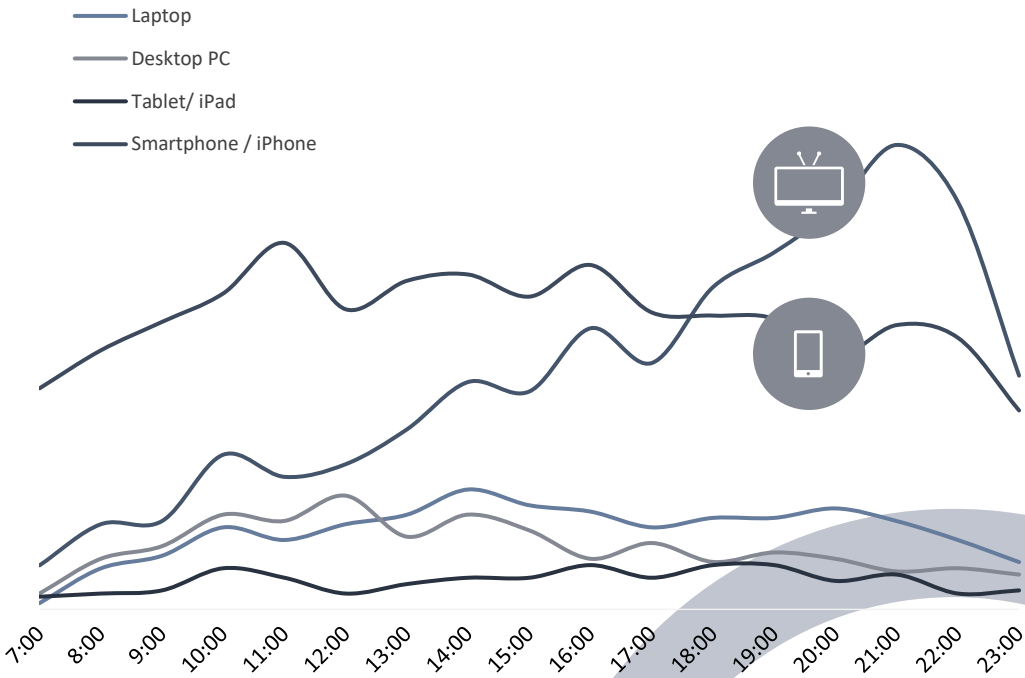
Significant increase in TV usage starting in the afternoon

Screen usage during the day

Total (14-59 year-olds)



Young Target Group (14-25 year-olds)

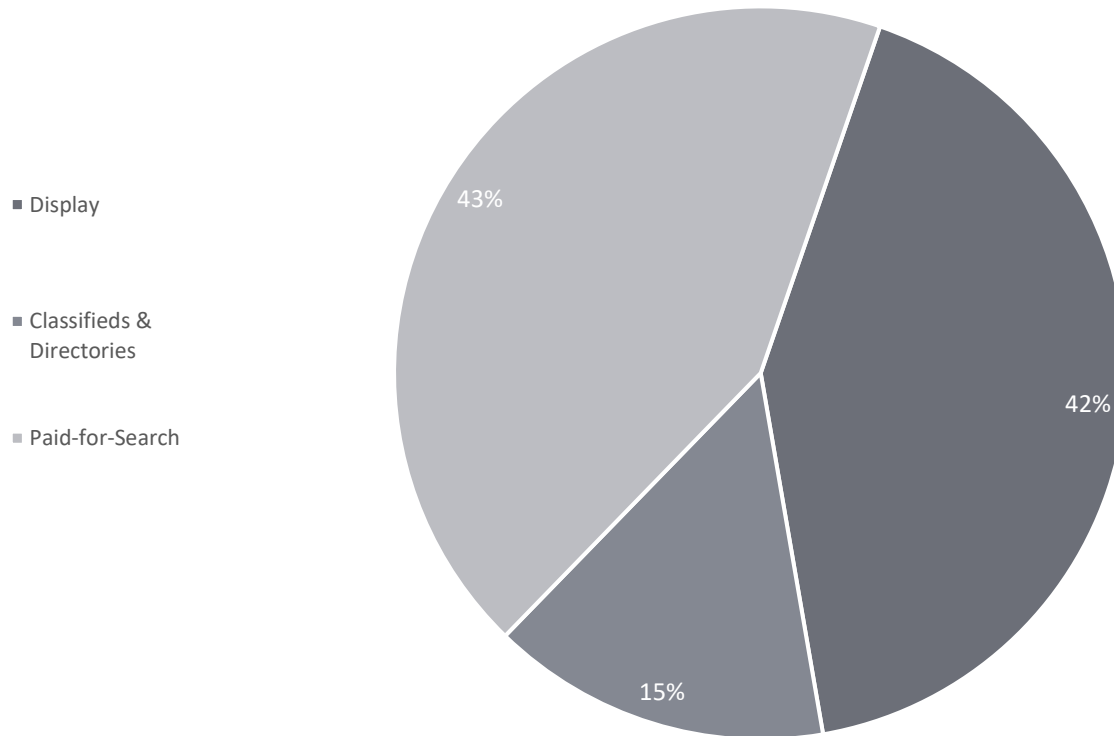


Source: Fourscreen Touchpoints 2019 / Basis: Screen contacts (Mon-Sun) Adults 14-59 years.

Online adspend is mostly generated by search.

Online ad invest is dominated by search, followed by display

Online adspend split



**Video
share of
display:
28%**



TV MARKET

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German channel groups overview

Three main broadcast groups in Germany

RTL/AdConnect

ProSiebenSat.1
Media SE

PUBLIC STATIONS

(not exhaustive)

Restricted / No advertising

OTHER

(just a few)

1st
generation



Sat.1



ProSieben



+7 regional channels
(no ads allowed)



2nd
generation



Kabel eins



No advertising



3rd / 4th
generation



No advertising



Pay TV



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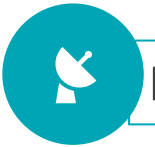
Source: Own research

Advertising Time



Public Channels
(ARD / ZDF)

On working days, **20 minutes per day**
max. which can be placed arbitrarily



Private Channels

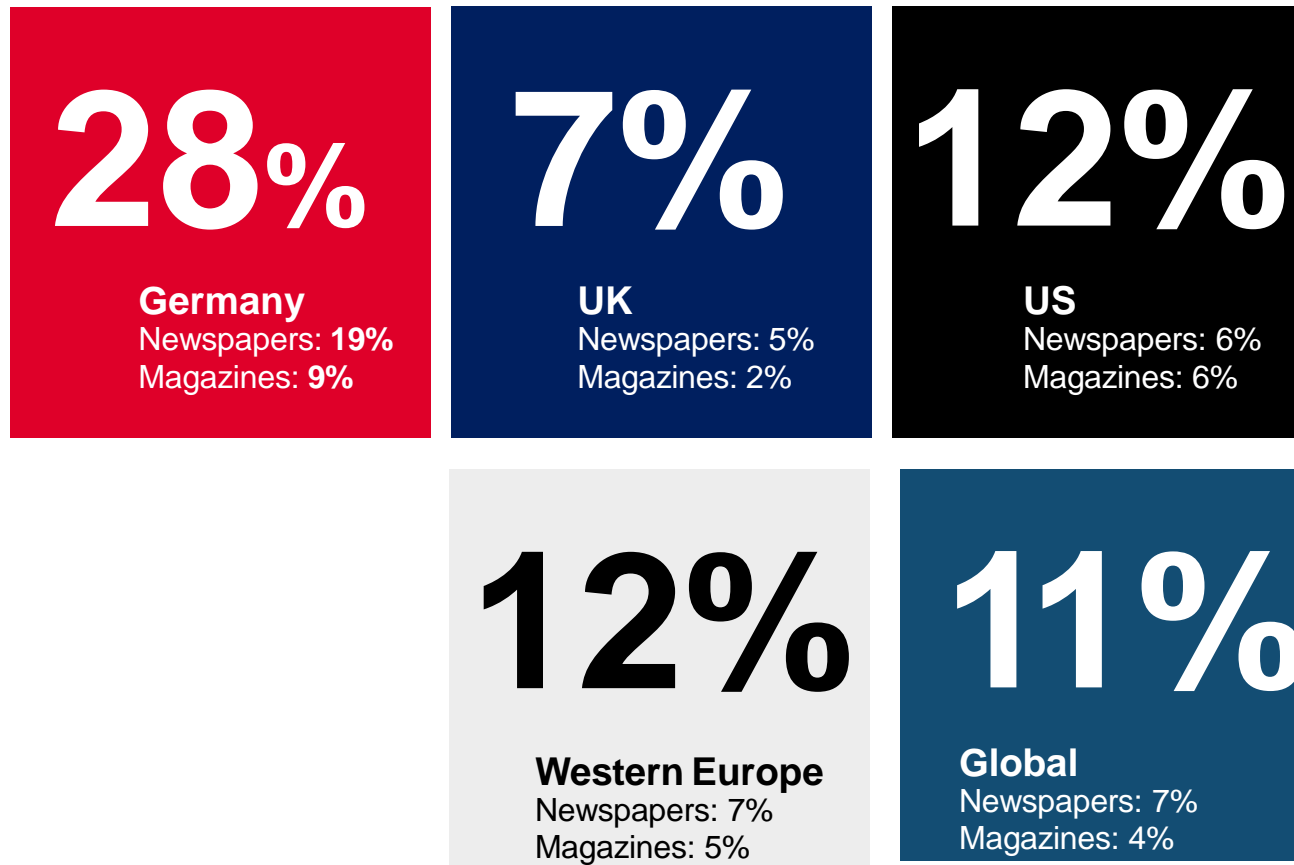
12 minutes/hour max.
(not including sponsorships, special creations,
infomercials)



PRINT & DIGITAL MARKET

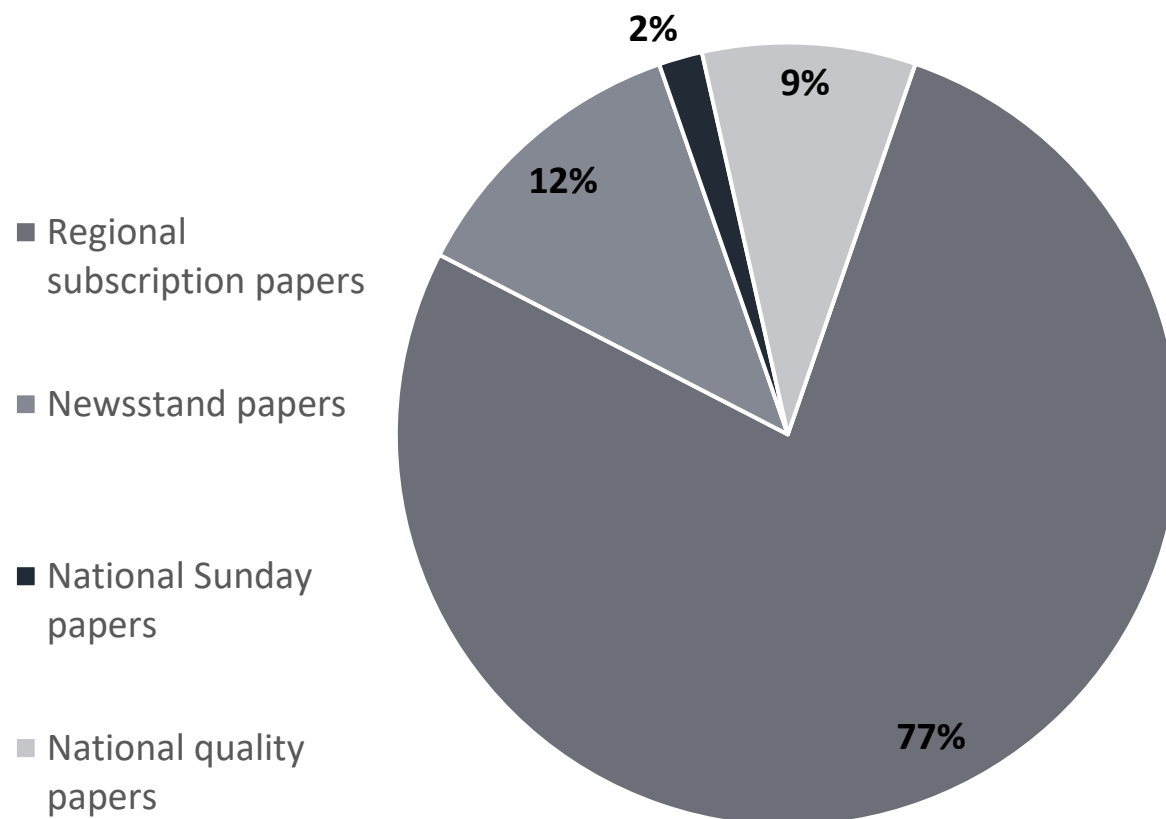
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2020: Advertisers in Germany keep on believing in Print!



GERMAN PRINT MARKET

GERMAN NEWSPAPER MARKET 2020



1) With the exception of weekly newspapers in accordance with BDZV/IVW. 2) IVW ø III 2020, based upon paid circulation.



CONCLUSIONES

Alemania es la primera economía de Europa.

El mercado alemán tiene un gran poder adquisitivo y una alta tasa de población a lo largo de cuarenta años.

Es un mercado atípico por el gran consumo de publicidad impresa en comparación con el resto de mercados. El mayor porcentaje de consumo de medios impresos se realiza a nivel regional.

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GRACIAS