



Women's Magazines in Germany

A Market Overview

Hamburg, March 2005

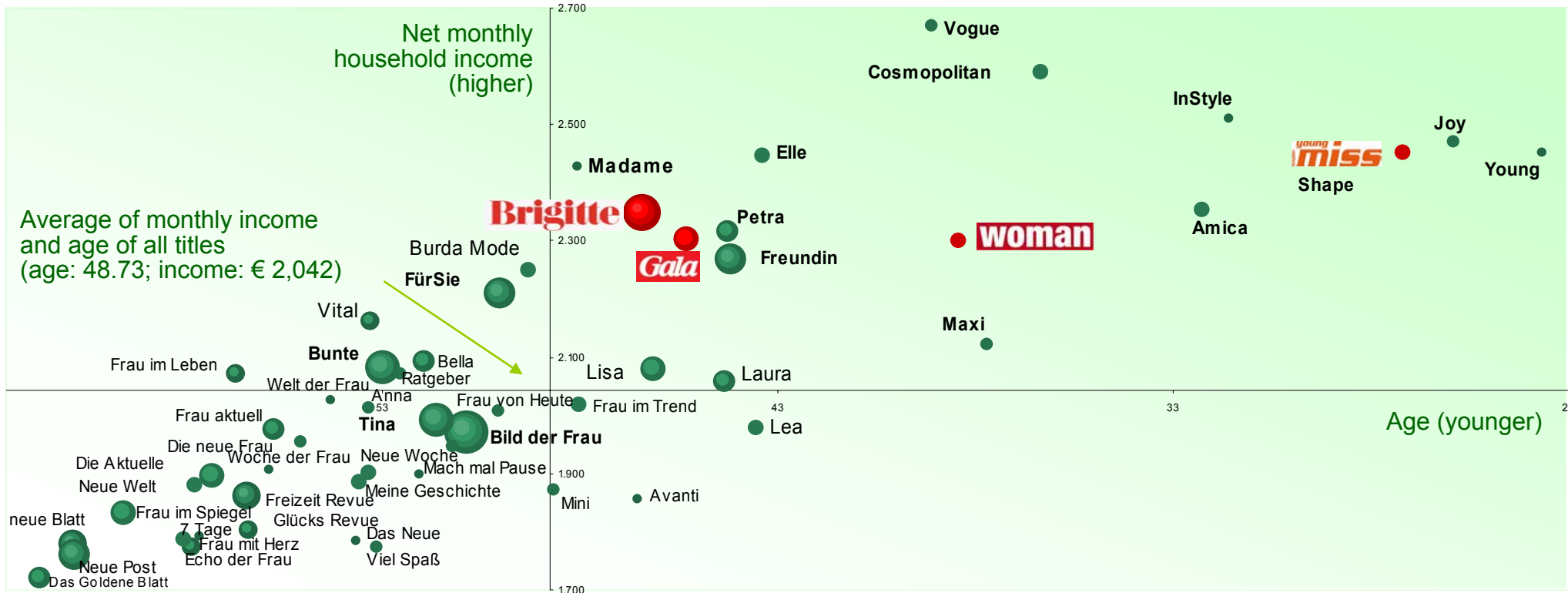
The German women's magazine market is very extensive and fragmented. This presentation aims to give a general overview of the main segments.

The market has been growing steadily for the last ten years, with an ever-increasing number of titles entering the market. The most recent trends have included pocket-sized magazines, line extensions, and celebrity titles.

It's a market in motion. The cycles of launches and closures have speeded up and a few titles have already become extinct. The challenge facing women's titles will be to reassess the validity of today's titles in view of today's readers. Yet standing out is vital to long-term survival. It seems that the ones that are differentiated and have held their own are the ones that are very successful.

- Market Segmentation and Development
- Illustration of the Segments
- Gruner + Jahr's Women's Magazines

Overview of all MA-listed titles with regard to age and income



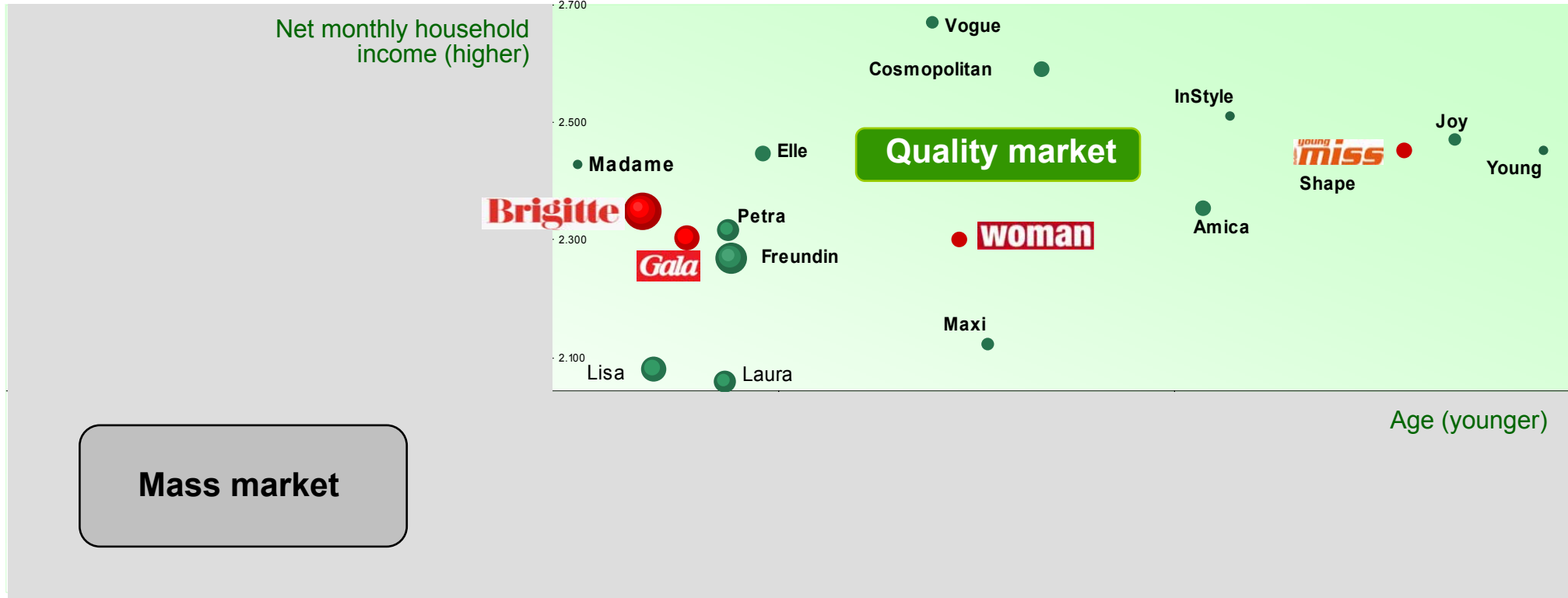
Not MA-audited:



Source: MA I/05; size of circle reflects title's coverage

allows a differentiation between mass market and quality magazines.

Overview of all MA-listed titles with regard to age and income

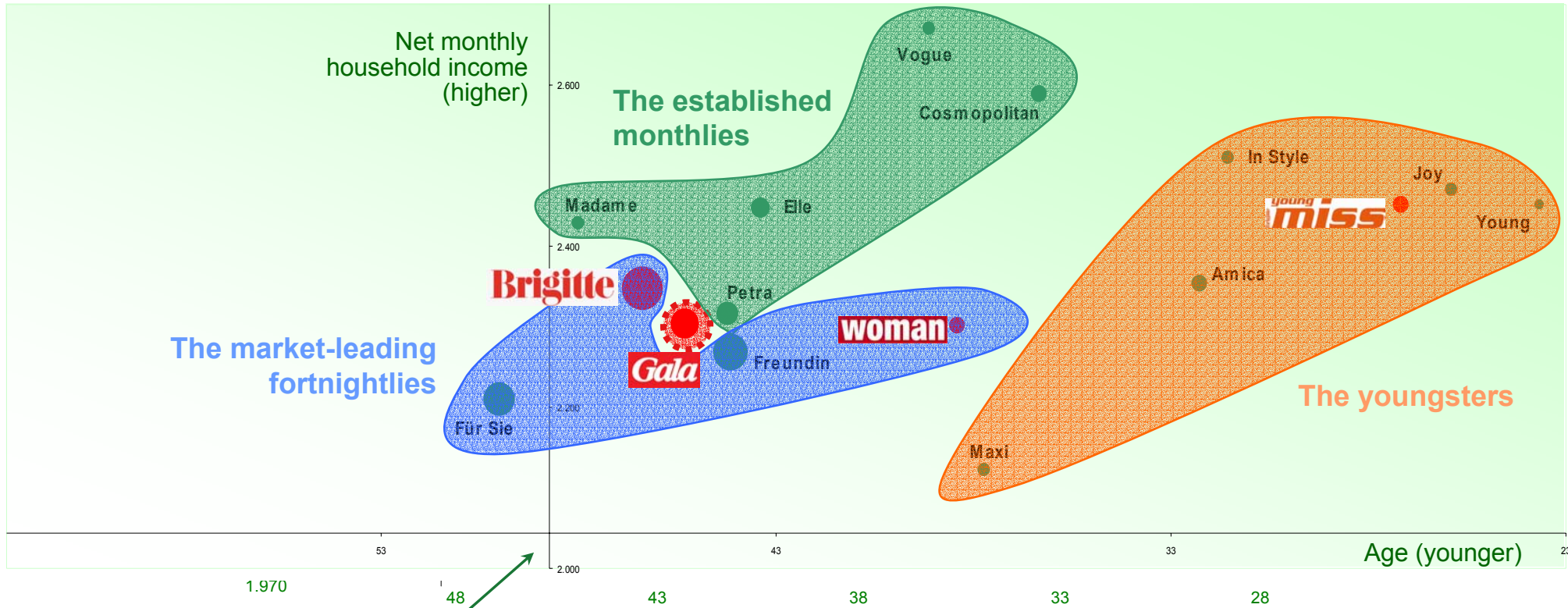


Not MA-audited:



Source: MA I/05; size of circle reflects title's coverage

The quality magazines can be categorized by their readership profiles.



Average of income and age of all titles
(age: 48.73; income: € 2,042)

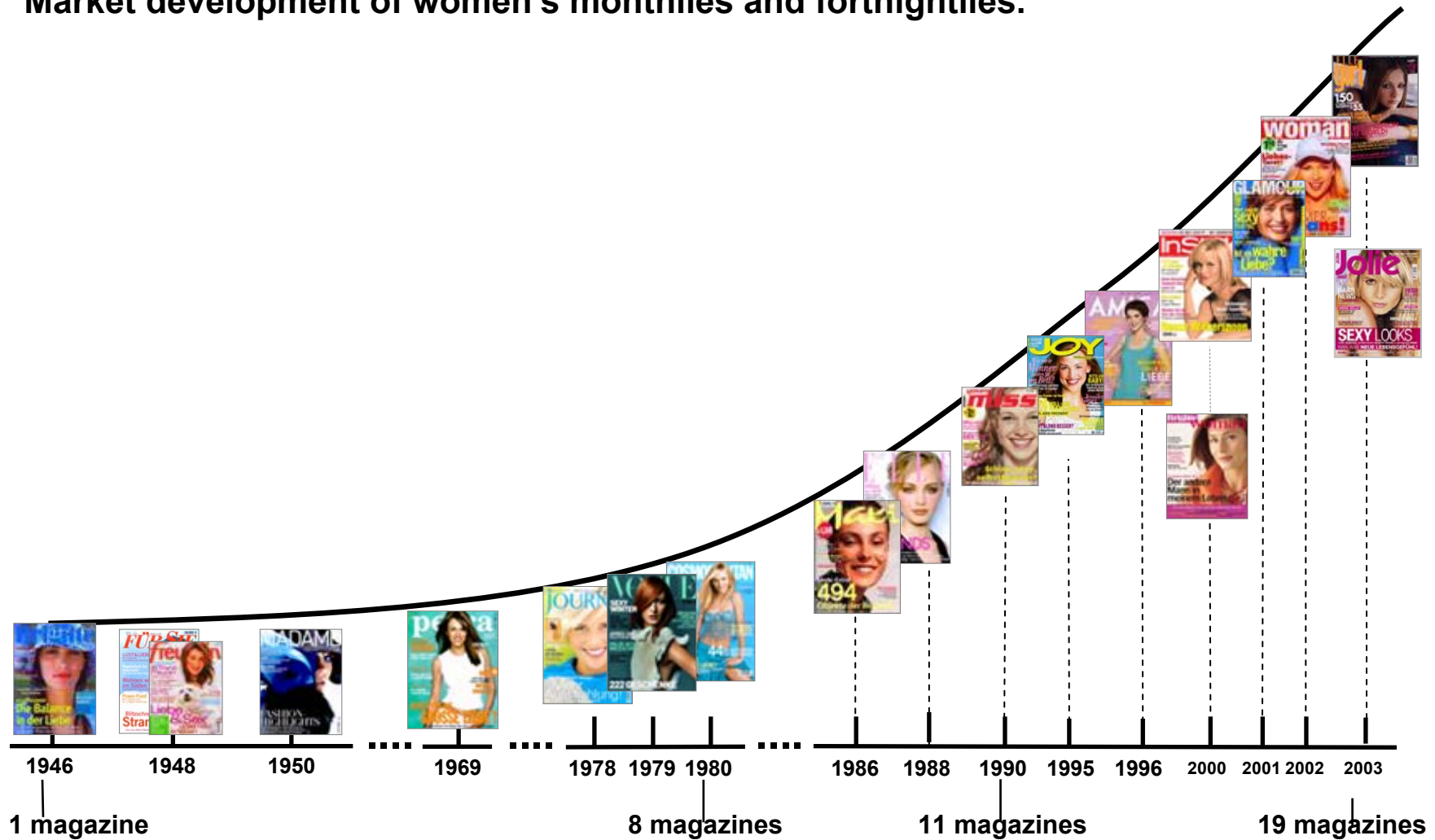
Not MA-audited:



Source: MA I/05; size of circle reflects title's coverage

► *The market for quality women's magazines has boomed in the last decade.*

Market development of women's monthlies and fortnightlies.



*listed are only those magazines that survived until today

Market development of handbag-sized magazines.

Market level**
content
positioning

high

low



2001



*

2002



2003

Glamour changed
its positioning over
time and became
fortnightly



Sept./Oct.
2003



Elle Girl
(TG 14-20)
Burda



Jolie
(TG 18-29)
Springer

*changed from large to pocket format;

**market level determined by cover price, content focus, and target group

Strong brands are used for line extensions for certain age groups or contents.

German women's magazines brands and their line extensions (quality market)

Quarterlies

Monthlies

Life phases

“Mother” brands

Special content

BRIGITTE
Woman

young
miss

Brigitte

BRIGITTE
Cookie

BRIGITTE
Kultur

BRIGITTE
Balance

freundin

Wellfit

Job@Business

GLAMOUR

Lucky

ELLE Girl

ELLE

ELLE Bistro

ELLE Deco

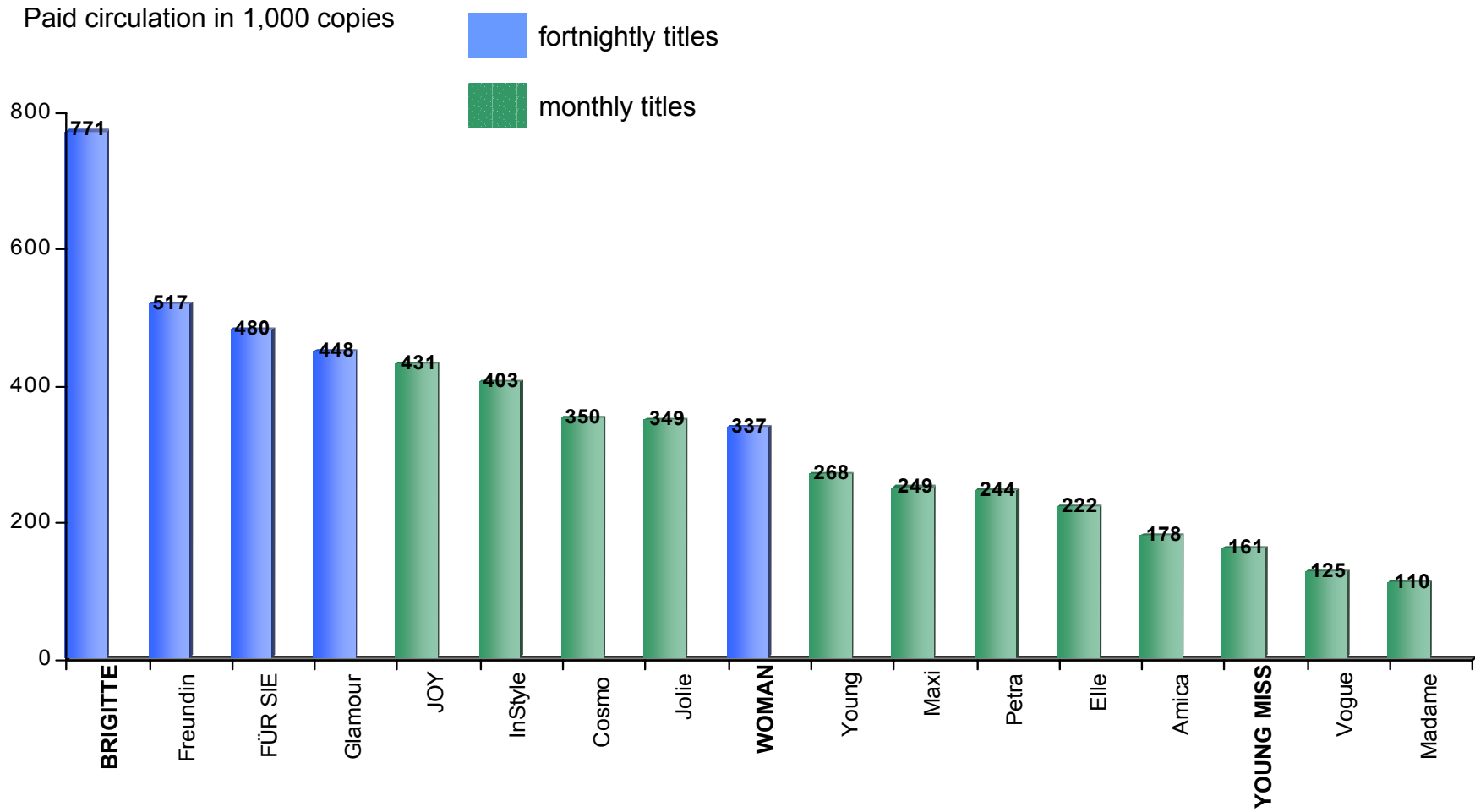
VOGUE

Business Vogue

JOY

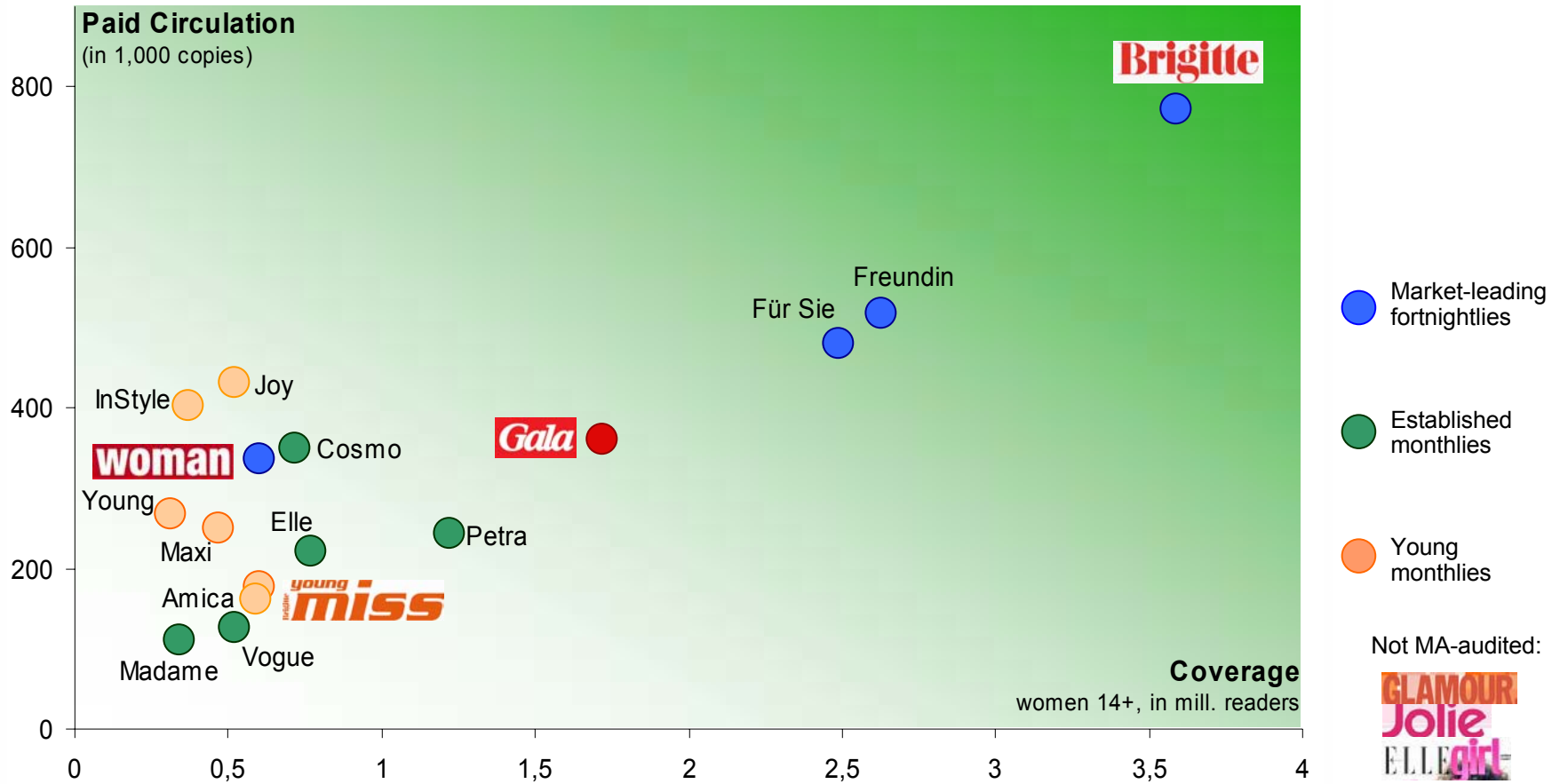
Joy Celebrity

Overview of the circulations of quality magazines



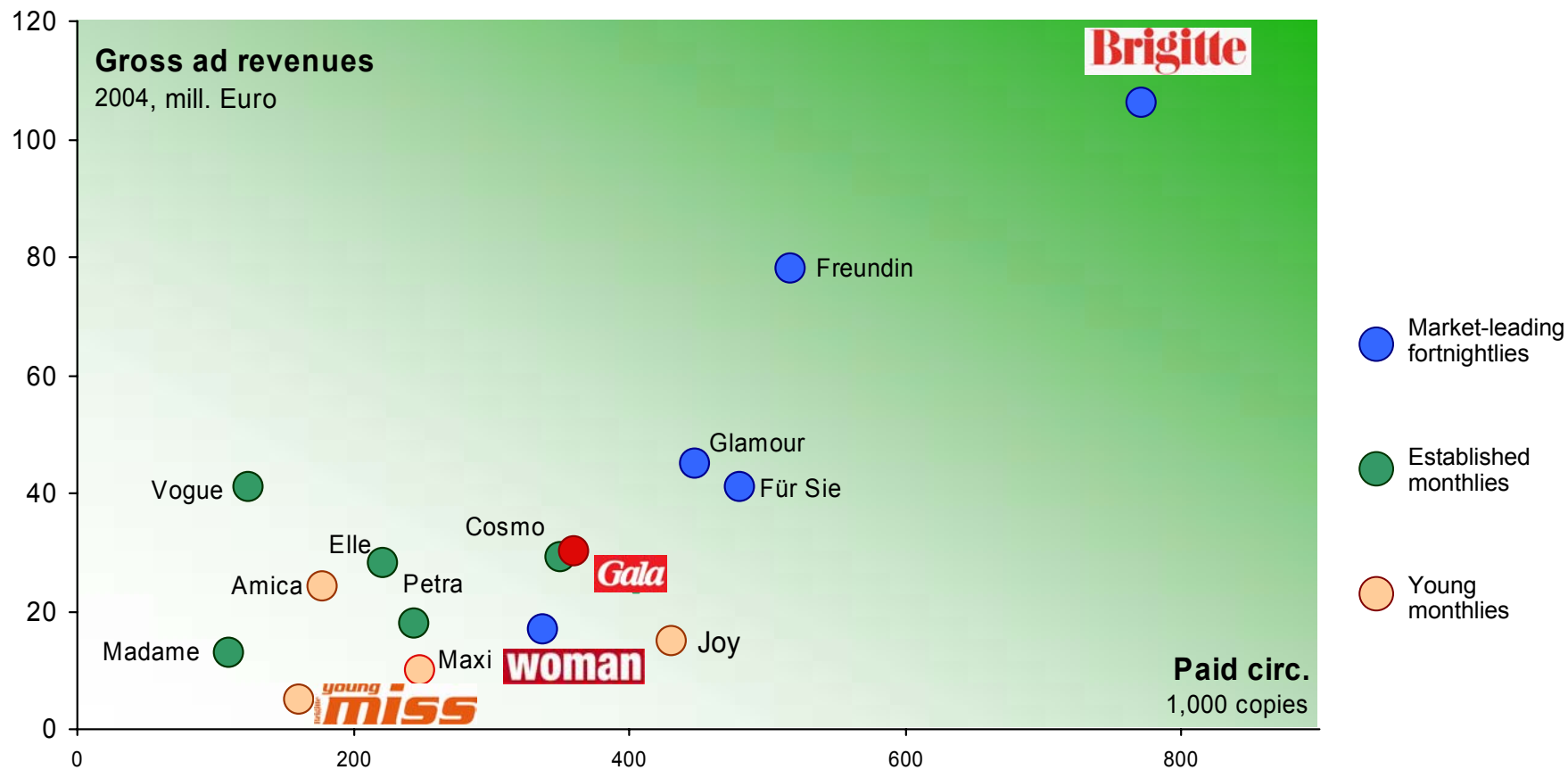
Source: IVW IV/2004

Overview of coverage and paid circulation.



Sources: MA I/05, IVW IV/2004

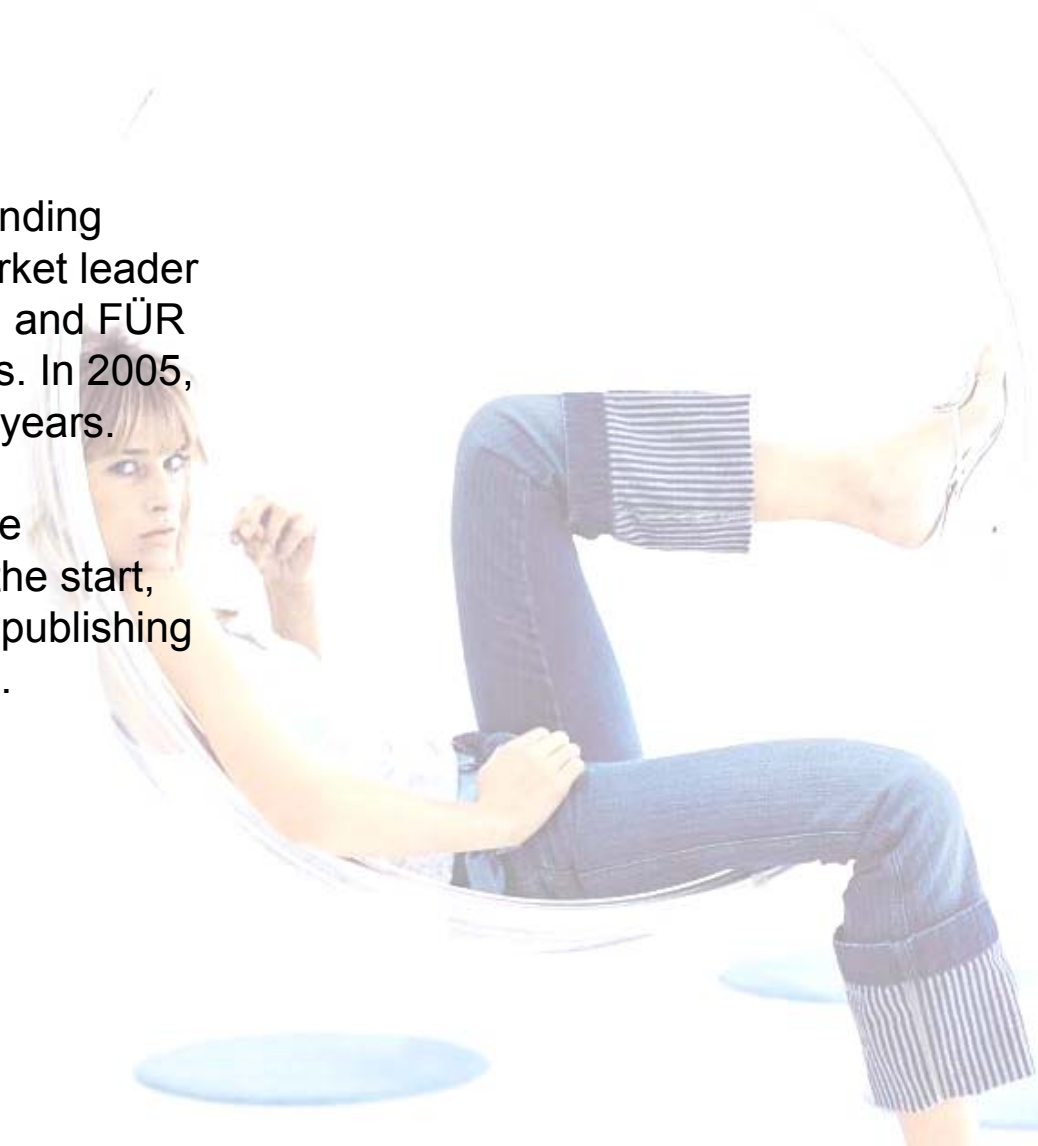
Paid circulation and relevance for advertising (measured by ad revenues 2003)



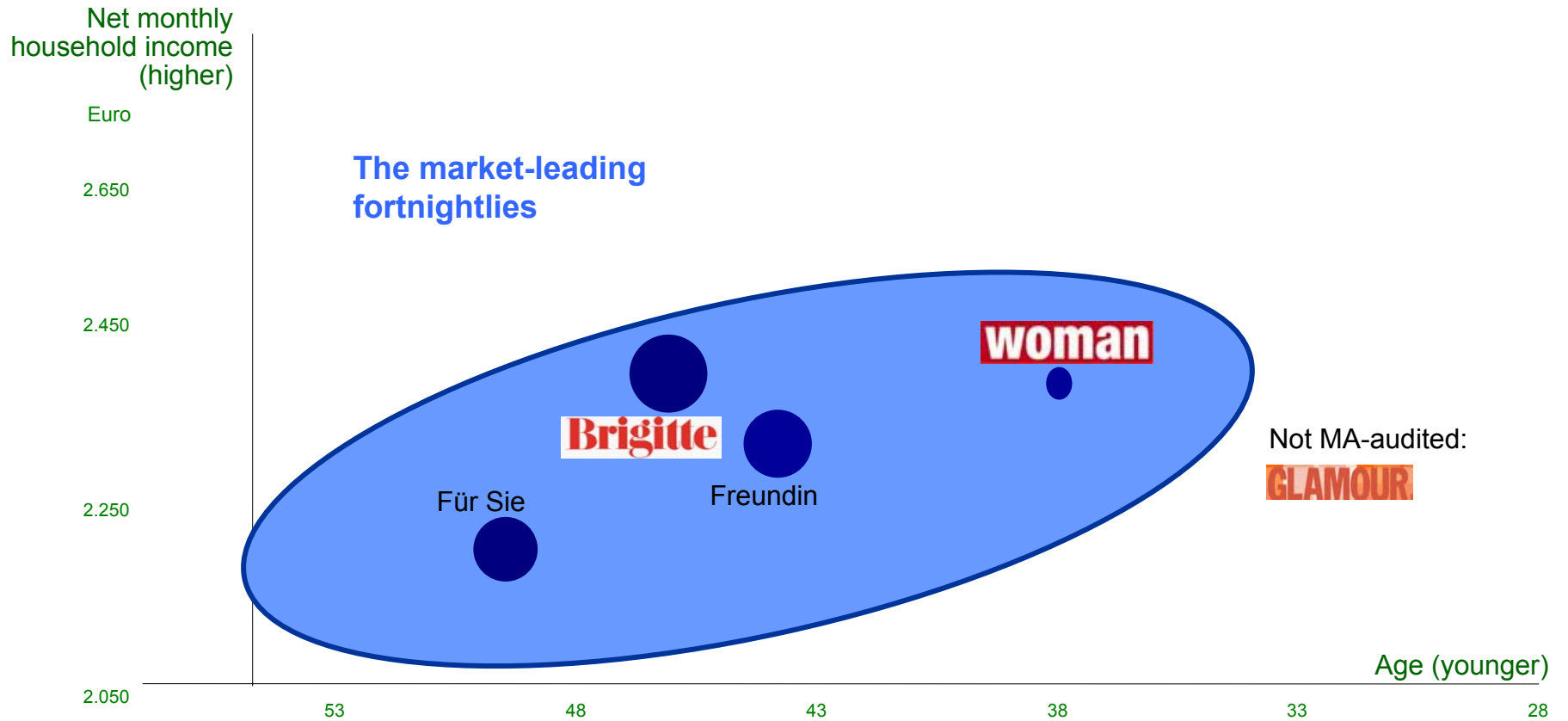
The quality titles
Sources: ACNielsen, IVW IV/2004

Fortnightly women's magazines have a long-standing tradition on the German market. The overall market leader BRIGITTE and its main competitors FREUNDIN and FÜR SIE and have dominated the market for decades. In 2005, JOURNAL FÜR DIE FRAU was closed after 26 years.

Recent additions to the fortnightly market include WOMAN, which was published fortnightly from the start, and GLAMOUR, which started off on a monthly publishing frequency before changing to fortnightly in 2003.



The category of the market-leading fortnightlies.



Source: MA I/05; size of circle reflects title's coverage
Universe: women 14+

Characteristics: Intelligent women get intelligent guidance and inspiration.

The market-leading fortnightlies



- Fashion, beauty and products that demanding, self-confident women can actually wear and (at least sometimes) afford
- Lifestyle (home, hospitality, travel, entertainment) topics which directly enhance their life
- Unique approach to women and celebrities in everyday and exceptional situations

Advertising benefit: high impact, top communicative power.

The newcomer



- Concise writing
- Younger readers than established titles
- Service oriented

Value for money, success stories

The adolescent



- Glamour, formerly monthly, became fortnightly in 2003
- Handbag-sized format
- Young readership

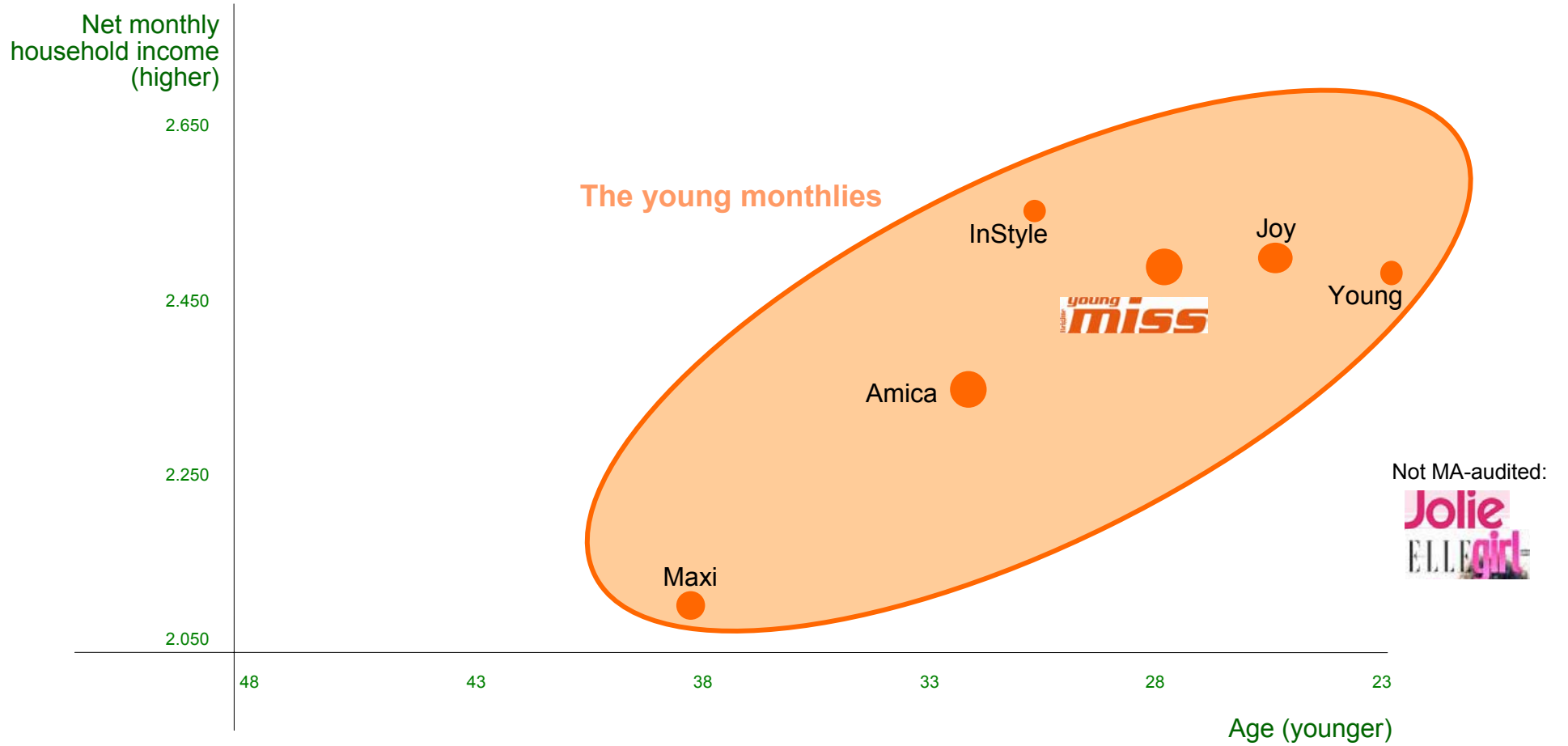
Basic media information



Cover Price	€ 2.20	€ 2.20	€ 2.00	€ 1.00	€ 1.90
Frequency	fortnightly	fortnightly	fortnightly	fortnightly	fortnightly
Rate 2005 (full colour page)	€ 46,900	€ 33,500	€ 25,700	€ 17,800	€ 23,600
Publisher	Gruner+Jahr	Burda	Jahreszeiten	Gruner+Jahr	Condé Nast
Since	1954	1948	1948	2002	2001
Paid Circulation	771,281	517,269	480,372	337,241	448,104
Coverage (Women 14 +)	3,590,000	2,630,000	2,490,000	600,000	n.a.
CPT (women 14 +)*	€ 12,67	€ 12,73	€ 10,31	€ 29,89	n.a.

Sources: IVW IV/2004; MA I/05 (Glamour not audited), *Basis: 1/1p 4c

▶ The category of the “youngsters” – the young and new monthlies.



Source: MA I/05

Eight young concepts – too different not to be further segmented.

The “grownups”



Amica targets the readers of the glossy monthlies. It appears in big size. Lately, Maxi has joined Amica.

The “adolescents”



YOUNG MISS, Joy and ELLE GIRL aim at even younger women by offering tailor made inspiration for the most explorative phase of their lives (14 -24). Joy has developed strongly towards Glamour.

Since 2000



InStyle (launched in 2000) offers a celebrity oriented approach.

Basic media information



Cover Price	€ 1.50	€ 1.80	€ 2.70	€ 1.60	€ 2.55	€ 1,50	€ 1,50	€ 1,50
Frequency	monthly	monthly	monthly	monthly	monthly	monthly	monthly	monthly (Feb. 2005)
Rate 2005 (full colour page)	€ 12,500	€ 15,000	€ 18,100	€ 20,500	€ 18,900	€ 12,500	€ 13,800	n.a.
Publisher	Gruner+Jahr	Bauer	Milchstrasse	Marquard	Burda	Burda	Axel-Springer	Burda
Since	1990	1986	1996	1995	2000	2002	2003	2003
Paid Circulation	160,667	248,637	178,210	430,964	403,439	268,062	349,385	n.a.
Coverage (Women 14 +)	590,000	470,000	600,000	520,000	370,000	310,000	n.a.	n.a.
CPT (Women 14 +)*	€ 21,14	€ 30,70	€ 29,36	€ 39,69	€ 51,61	40,41	n.a.	n.a.

Sources: IVW IV/2004; MA I/05. * Basis 1/1p 4c

Overview and special attributes of the established monthlies

international brands



- Strong emphasis on international high fashion
- Sumptuous presentation of the fashion and beauty world
- Examples of trendy, exclusive lifestyles
- Exclusive readerships

Advertising benefit: Image.

“homegrown” brands



- Fashion competence
- Mainstream combined with luxury
- Address established women

Basic media information



Cover Price	€ 2,60	€ 6,00	€ 4,00	€ 5,00	€ 2,50
Frequency	monthly	monthly	monthly	monthly	monthly
Rate 2005 (full colour page)	€ 25,200	€ 23,800	€ 22,200	€ 16,100	€ 22,250
Publisher	MVG	Condé Nast	Burda	Magazin-Presse Verlag	Jahreszeiten
Since	1980	1979	1988	1950	1969
Paid Circulation	349,862	125,130	221,597	109,738	243,625
Coverage (Women 14 +)	720,000	520,000	770,000	340,000	1,220,000
CPT (Women 14 +)*	€ 34,93	€ 45,87	€ 27,95	€ 45,62	€ 18,30

Sources: IVW IV/2004; MA I/05 Pressemedien; * Basis: 1/1p 4c

**Gruner + Jahr's
Women's Magazines**





Germany's most widely-read quality women's magazine.

BRIGITTE relates exciting stories, it is full of practical ideas, its extravagant visual appeal invites the reader to leaf through it and dream.



What is it that makes the success of Brigitte?

- **Confidence:**

But most important fact is that our readers say: “Brigitte gets its content right.” This trust we have to keep on earning – and we do so with every issue.

- **Competence:**

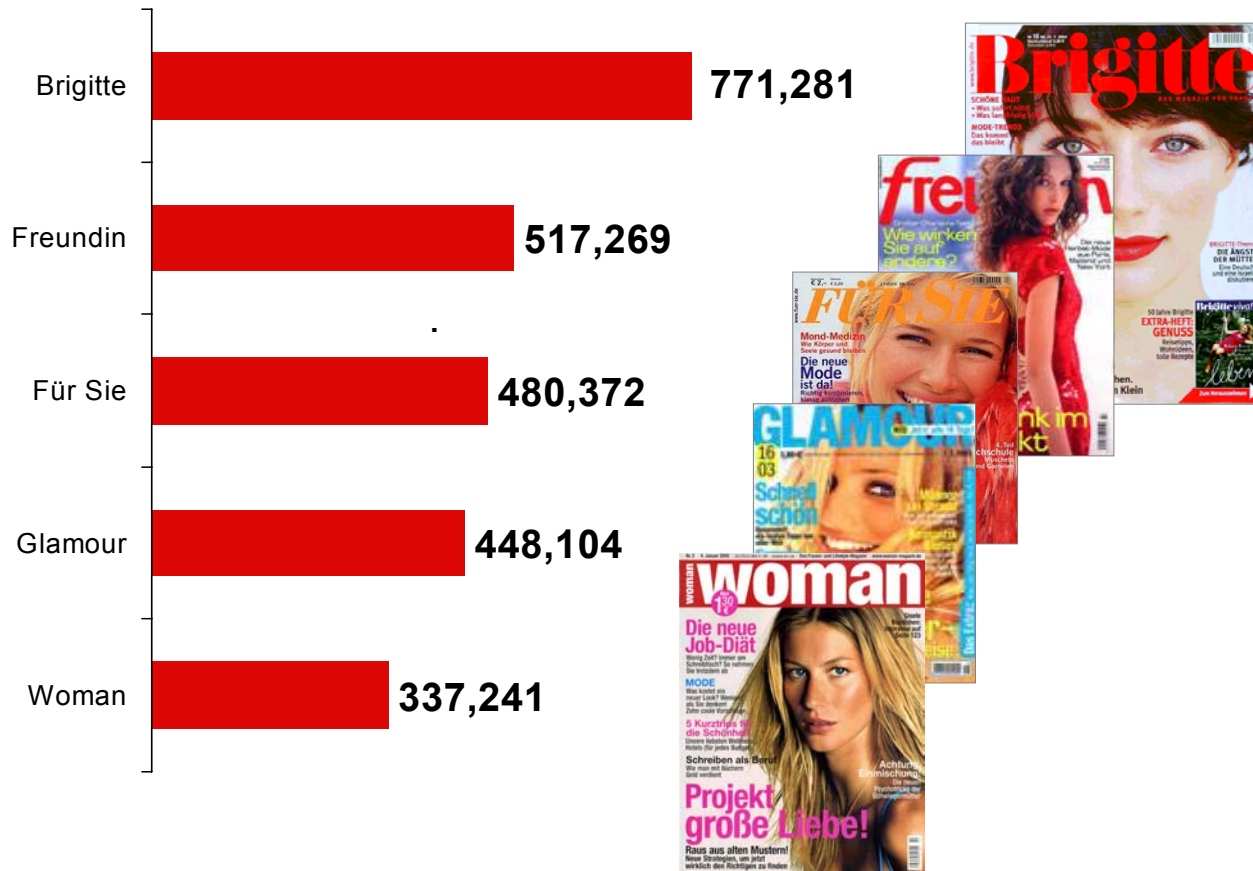
Every Brigitte editor knows her field inside out. We ourselves develop and thoroughly test every recipe, every idea for living.

- **Openness:**

Our producers present the international fashion and cosmetic trends in a manner that entertains Brigitte readers and gives them pleasure. Our editors and our reporters are out and about the world over to bring back the reports and portraits that Brigitte is famous for.



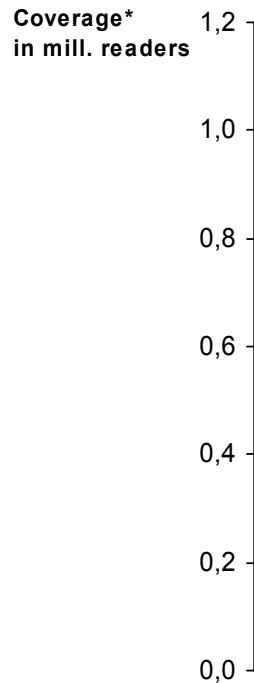
Circulation overview



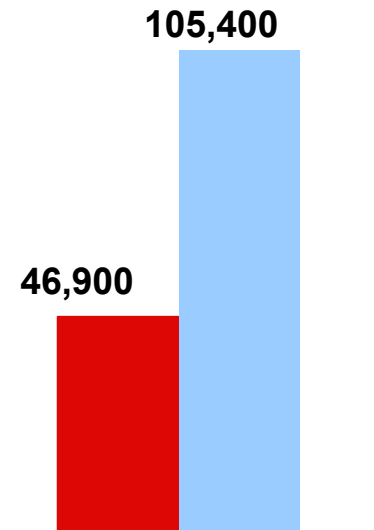
Source: IVW IV/2004



**Comparison:
coverage of women aged 20-49
with socio-economic status 1-2**



The cost (in €):



The socio-economic status is measured on a scale of 1-7, 1=highest.

* net readership. Source: MA I/05



since 1954
fortnightly
771,281 copies sold*



since 1990
monthly
160,667 copies sold*



since 2001
six issues per year
317,000 copies sold**



NEW! From 04/04
twice a year
250,000 copies sold*



since 2003
twice a year
150,000 copies sold*



since 2003
quarterly
150,000 copies sold *



Source: * average IVW IV/2004



Brigitte Woman is a magazine for confident, brand-oriented and consumption-oriented women aged 40 plus.

A magazine, that offers new possibilities for brands to respond directly on the needs of these women.

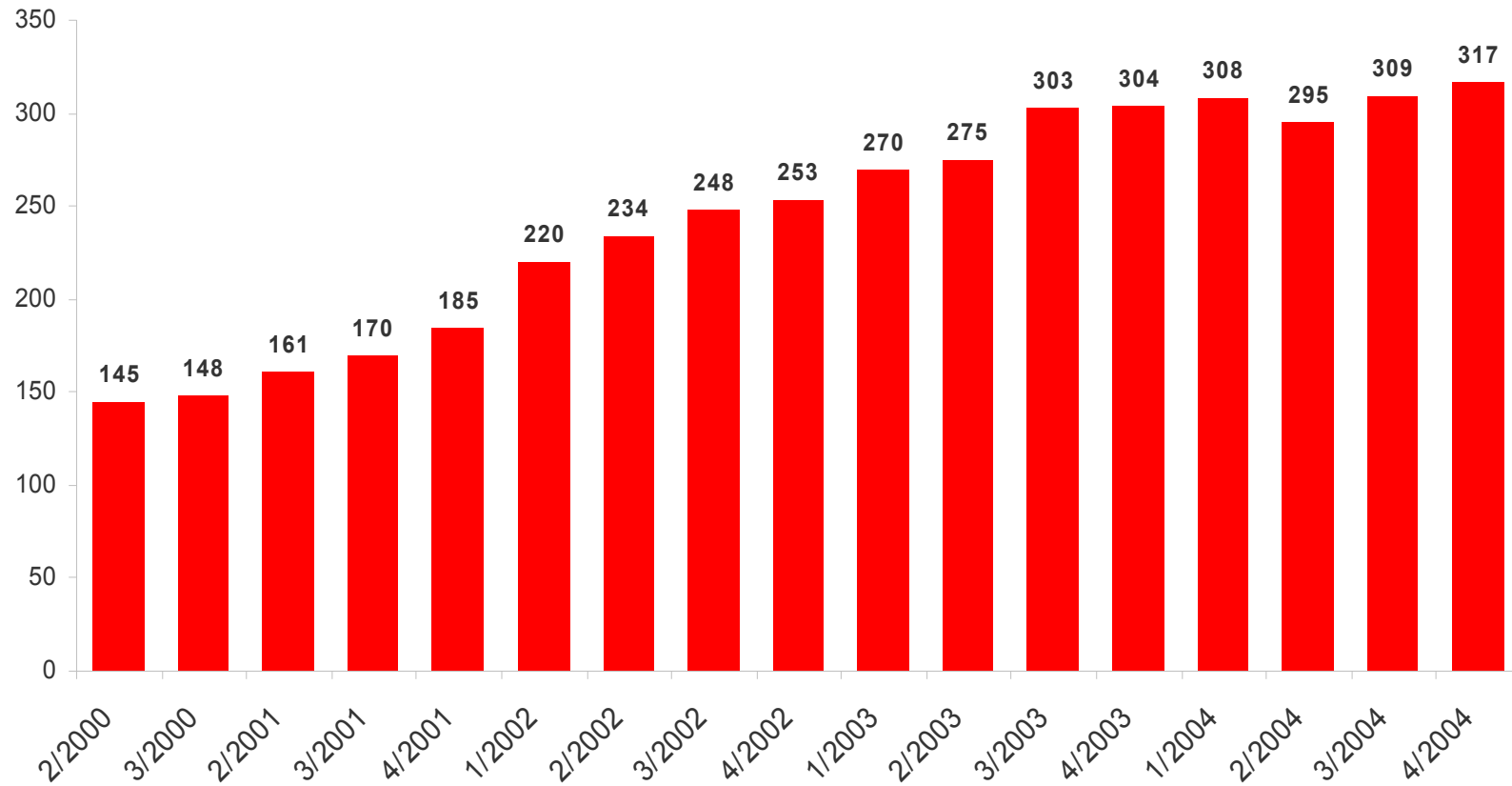
Brigitte Woman is like her readers:

- calm, but enthusiastic for new experiences
- established, but open for an intensive life
- pleasure-oriented, but responsible and not superficial



Until 2004, Brigitte Woman was issued four times a year, since 2005 six times a year.

Paid circulation in thousand copies



Source: publisher's statement



Faster, fresher, smarter:

WOMAN is the magazine for today's young, self-assured women. For women who love to live their own lives.

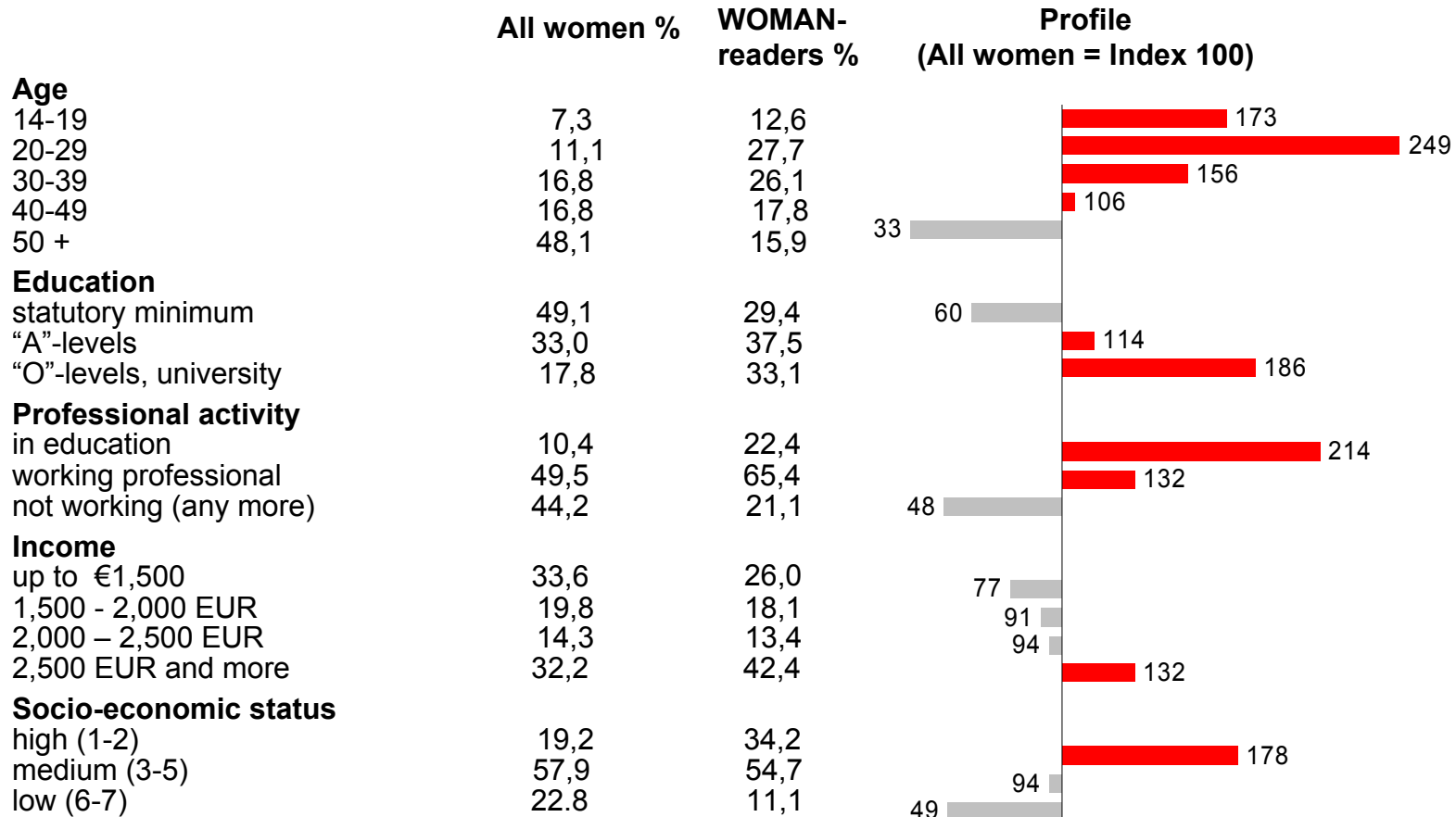
WOMAN's editorial concept is as multi-optional, open-minded and flexible as the expectations and attitudes of modern young women themselves.

The women for whom WOMAN is written are active, both professionally and privately.

WOMAN – for women who want to live and read as they wish.



Young, highly educated, professionals



Source: AWA 2004, Universe: women





In 1995, YOUNG MISS opened up a whole new segment in the women's magazine market. The teenagers of those days have become young women: smart, sexy, self-confident.

YOUNG MISS has accompanied them. Has grown with them and also found a new style for itself: more grown up and more demanding.

YOUNG MISS stays the best friend for its readers and faithful to itself.










- They are **well-off**. 33.7% have a net monthly household income of € 3,000 and more (index 148).
- They are **well-educated**. 30.6% have A-level or are university students (index 295).
- They are **communicative** and **open-minded**. 72.8% make new friends very easily (index 121).
- They are **important consumers**. 51.5 % prefer enjoying life than saving their money (index 137).
- They are **fashionable**. 39.0% like to buy modern design (index 215).
- They are **trendsetters**. For 65.7 % it is very important to know what's "fashionable" (index 176).

Source: AWA 2004, Universe: YOUNG MISS readers. Index : all women = 100.



▶ **YOUNG MISS. Number 1 in terms of efficiency.**

	Coverage			Cost per Thousand		Ad rate 1/1 4c
	in %	in mill.	Rank	€	Rank	€
	6.6	0.41	1	30.20	1	12.500
	5.9	0.37	2	55.68	3	20.500
	4.7	0.29	3	60.39	4	18.100
	4.3	0.27	4	93.02	7	25.200
	3.9	0.24	5	51.29	2	12.500
	3.9	0.24	6	91.40	6	22.250
	3.0	0.19	7	99.38	8	18.900
Maxi	2.8	0.17	8	84.04	5	15.000

Ranking monthly women's magazines. Target group Women 14-29 years (3,753 cases • 6.24 million)
 Ranking criteria: Cost per 1000 readers Source: MA I/2005 (Glamour not audited),
 Top overage monthly women's magazines in that target group *Rate 1/1 4c 2005

Table:



Thank you!



BRIGITTE



BRIGITTE WOMAN



WOMAN



BRIGITTE YOUNG MISS



GALA



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