

Women's Magazines in Germany

October 2006

The Women's Magazine Market – Overview and Development

The Individual Segments

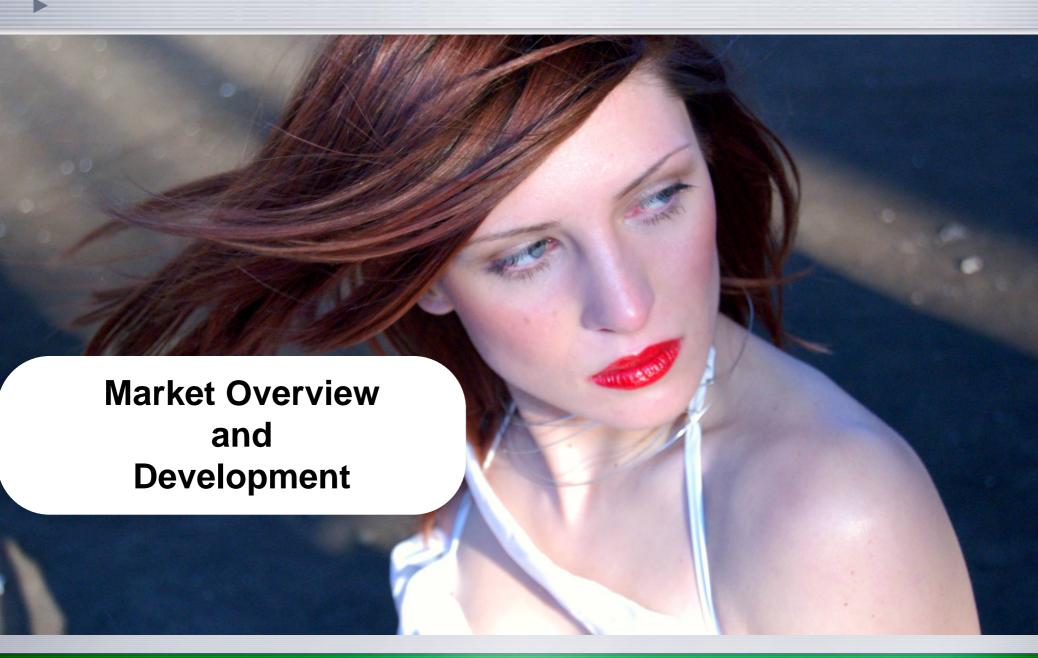
- Young
- Lifestyle
- Classic
- International Glossies
- Home-grown Established

The Women's Magazines from Gruner + Jahr

- Brigitte
- Brigitte Woman
- Brigitte Balance
- Woman
- Gala
- Emotion
- Eltern
- Healthy Living

Online Performance – Women's Magazines from Gruner + Jahr



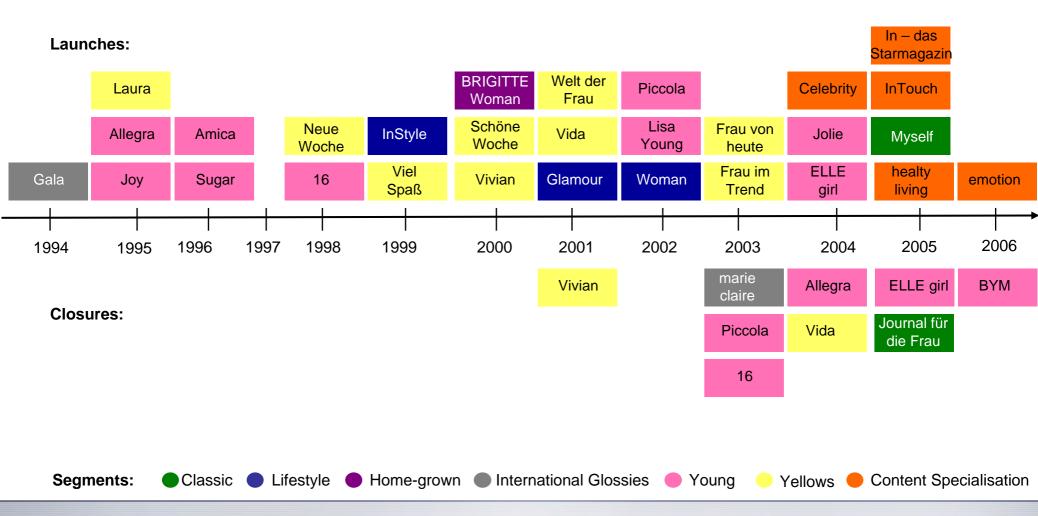




Background: General Market Situation

- The German women's magazine market is highly extensive and fragmented. This
 presentation gives a general overview of the major segments.
- The market has been growing steadily for the last ten years, with an ever-increasing number of titles entering the market. Recent trends have included pocket-sized magazines, line extensions, celebrity titles, and further specialisation with regard to age or special content.
- 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 today's women's titles is to reassess the validity of today's titles in view of today's readers. Yet standing out from the crowd turns out vital to long-term survival. It seems that the ones that are differentiated and have kept their own identity are the ones that are the most successful.

Dynamic developments in the women's magazine market: Overview of recent launches and closures





Major market trends: specialisation with regard to age or special content

"Generalists":









"Specialists": Differentiation according to...

Age





















18-29

18-29

18-39

av. 28

20-39

20-39

30+

30-50

40+

Pocket Format



People









Fitness, Wellness Health











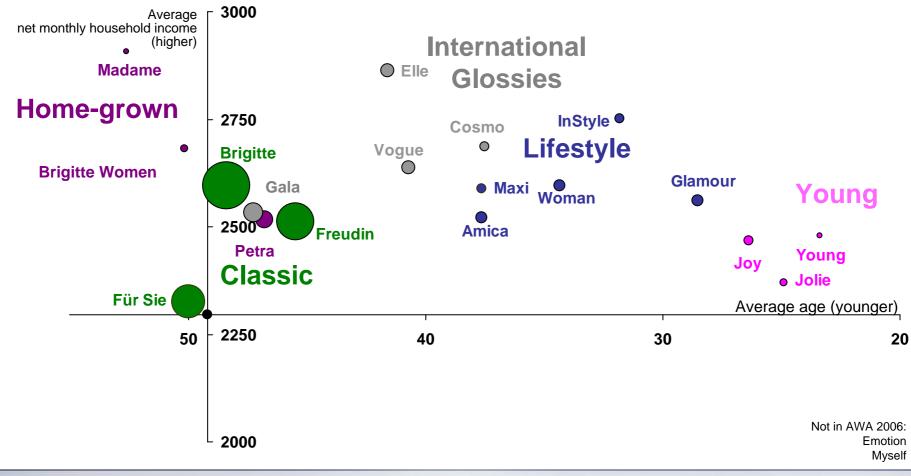
Psychology





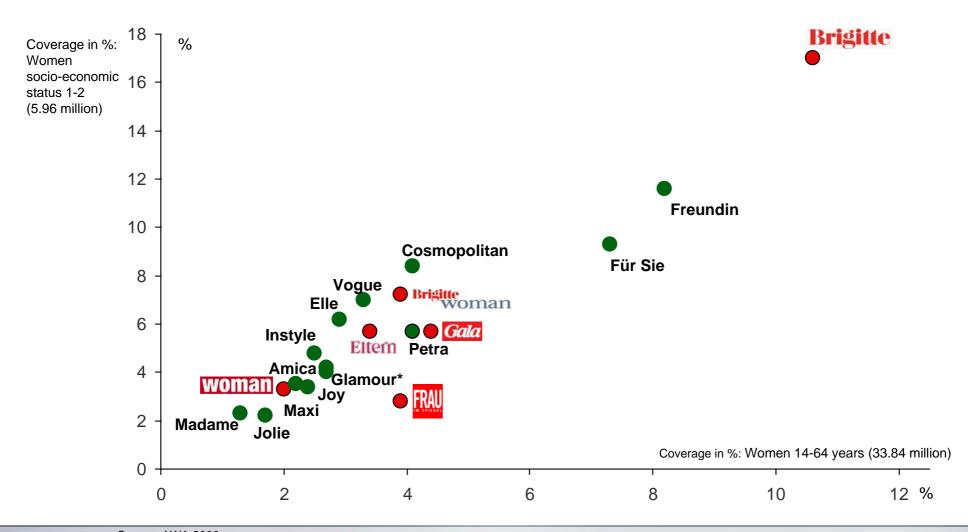


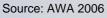
Market segmentation of the quality magazine market: categorized by their readership profiles with regard to age and income





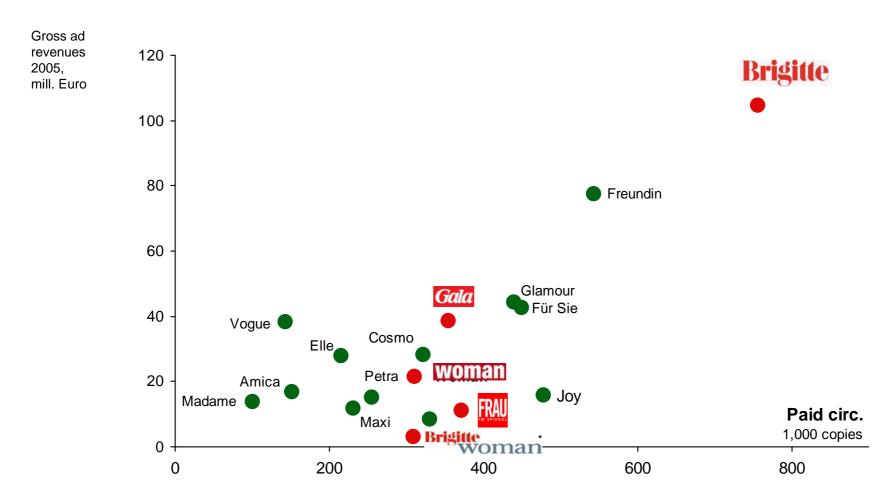
Market segmentation by coverage: the fortnightlies dominate the market

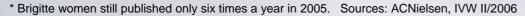






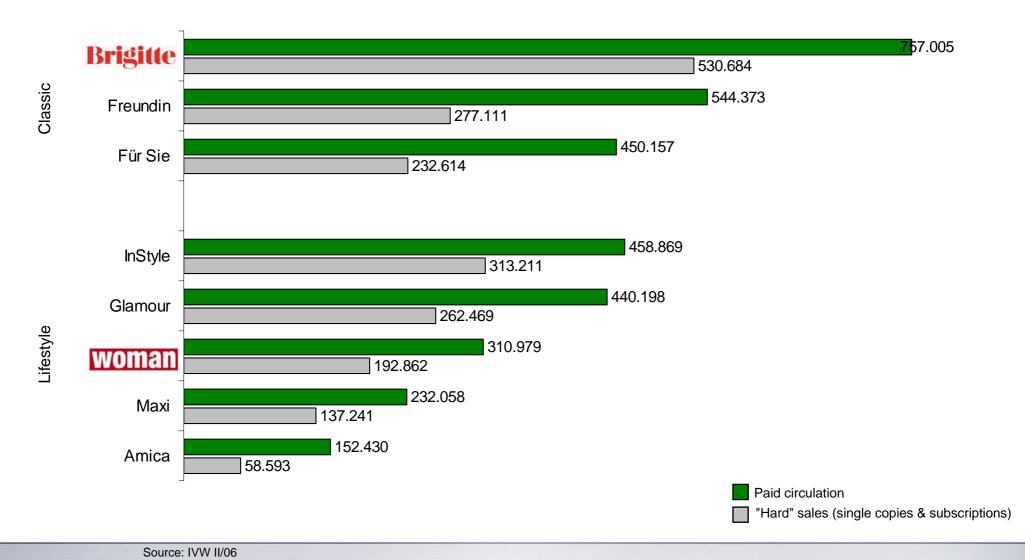
Advertising revenues illustrate the leading role of the fortnightlies: Ad revenues and paid circulation (measured by ad revenues 2005)





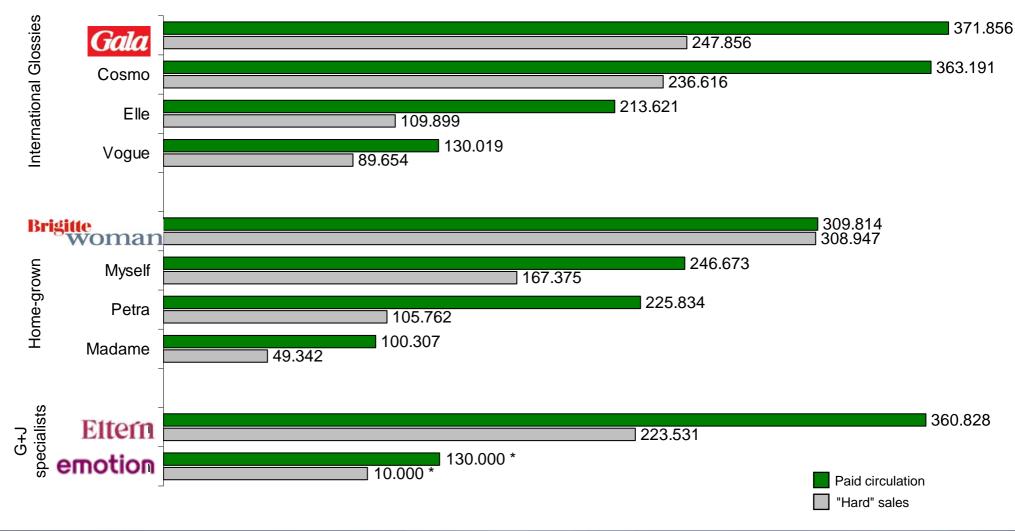


The circulations of quality titles differ significantly:





The circulations of quality titles differ significantly:





Source: IVW II/06





Overview Segment "Young"



The adolescents - young magazines for women from 18 to 29 years old:

- They aim at young women by offering tailormade inspiration for the most explorative phase of their lives
- Main topics are fashion, beauty, trends and lifestyle, but also people and partnership
- Young, Jolie and Joy appear monthly in pocket format.

Advertising benefit: Young target, value for money



Basic Media Information



Publisher	Marquard	Burda	Axel Springer
Cover Price	€1.60	€1,80	€1,60
Rate 2006 (full colour page)	€21,500	€13,700	€16,000
Paid Circulation	478,378	234,413	330,983
Coverage (Women 14 +)	800,000	400,000	580,000
CPT (Women 14 +)*	€26.82	€34.66	€27.65
Frequency	monthly	monthly	monthly
Since	1995	2002	2003

Overview "Lifestyle"



Lifestyle for the confident, modern women of about 30:

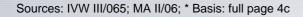
- All topics, with focus on fashion and beauty and trends
- High-quality format and lifestyle focus for a younger readership than the established glossies
- Instyle: focused on the world of stars.
- Amica: recently repositioned as fashion and trend magazine, limited readership
- Maxi: focused on fashion and beauty, but also deals with other topics such as partnership and job.
- Glamour: formerly monthly, fortnightly since 2003, handbag-sized format, positioned as style guide for fashion, beauty, and entertainment, little depth
- WOMAN: fortnightly, couples the variety of topics and service provided by the classic magazines with a modern, upmarket format and the lifestyle focus that is characteristic for the monthlies.

High-quality lifestyle environment



Basic Media Information





Publisher

Rate 2006

Coverage (Women 14 +)

(Women 14 +)*

CPT

Since



Overview "Classic"









Intelligent guidance and inspiration for women of every age:

- Covering the classic women's magazine topics: fashion, beauty, lifestyle (home, hospitality, travel, entertainment), job, psychology and partnership.
- Featuring products and services that women can actually use and (at least sometimes) afford
- Unique approach to women in everyday and exceptional situations (e.g. portraits)
- Among the classic female magazines, fortnightly have a long-standing tradition on the German market.
- The overall market leader BRIGITTE and its main competitors Freundin and Für Sie have dominated the market for decades.

Advertising benefit: high impact, top communicative power.



Basic Media Information



Publisher	Gruner+Jahr	Burda	Jahreszeiten	Condé Nast
Cover Price	€2.20	€2.20	€2.20	€2,50
Rate 2006 (full colour page)	€46,900	€33,900	€25,700	€18,500
Paid Circulation	757,005	544,373	450,157	246.673
Coverage (Women 14 +)	3,600,000	2,700,000	2,460,000	450,000
CPT (Women 14 +)*	€12.63	€12.25	€10.44	€41.11
Frequency	fortnightly	fortnightly	fortnightly	monthly
Since	1954	1948	1948	2006



Overview "International Glossies"









All the beauty of being a woman -The fascinating world of fashion and stars:

- International brands feature trendy, exclusive lifestyles for an exclusive readership
- Elle and Vogue: established monthlies, strong emphasis on international high fashion, sumptuous presentation of the fashion and beauty world
- Cosmopolitan: monthly, strong focus on partnership, sex and career
- Gala: premium people magazine, the recently launched opulent style section underlines its exceptional fashion competence

Advertising benefit: Image, glamour, exclusivity



Basic Media Information



Publisher	Gruner+Jahr	MVG	Condé Nast	Burda
Cover Price	€2.40	€2,60	€6,00	€4,50
Rate 2006 (full colour page)	€18,900	€25,800	€24,300	€23,000
Paid Circulation	355,273	322,914	144,021	215,123
Coverage (Women 14 +)	1,677,000	800,000	580,000	820,000
CPT (Women 14 +)*	€11.28	€32.30	€42.06	€27.26
Frequency	weekly	monthly	monthly	monthly
Since	1994	1980	1979	1988

Sources: IVW I/2005; MA I/05; * Basis: full page 4c



Overview "Home-grown"



National brands for established women:

- Address adult women, who have found their own taste and style.
- Present fashion and cosmetics in opulent photo spreads, and inspiration for every days life.
- Madame and Petra: fashion and trend magazines
- Brigitte Woman: Since autumn 2007 monthly, for women in the best stage of their lives. Presents fashion, cosmetics and home decoration trends, as well as travel and psychology and offers identification. The first German magazine that is totally oriented to the interests of women aged over 40 has been a sensational success.

Advertising benefit: Image, identification, credibility



Basic Media Information



Publisher	Gruner+Jahr	Magazin-Presse	Jahreszeiten
Cover Price	€3.30	€5,00	€2,50
Rate 2006 (full colour page)	€18,000	€16,420	€22,250
Paid Circulation	309,814	100,307	225,843
Coverage (Women 14 +)	1,330,000	450,000	1,400,000
CPT (Women 14 +)*	€13.53	€35.57	€15.91
Frequency	monthly	monthly	monthly
Since	2001	1950	1969







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



For more than 50 years, BRIGITTE has accompanied German women through their lives. BRIGITTE is the undisputed market leader – serious and competent, not only in classic women's subjects, but also in areas like literature, society and medicine. Large-scale surveys, reports and reader activities all underscore the magazine's leading role.

BRIGITTE readers are mainly women between 20 and 49 years that not only expect excellent entertainment and quality but a strong value of benefit. To meet this expectations consistently in a new, surprising and sensual way – this is the accomplishment of our editors.

Brigitte's wide coverage and intensive level of reader closeness enable brand name communication that spans the generations.





► Women's Magazines from Gruner + Jahr

BRIGITTE. Inside















What is it that makes the matchless success of Brigitte?

Brigitte has a feeling for the reader.

The largest (80-person) editorial staff of all German female magazines acts like a kind of "internal market research" to find out the topics and trends that really matter. This is much more than just a "gut feeling" but is based on unmatched experience and knowledge.

Brigitte is in dialogue with its readers.

Maximum proof of confidence: BRIGITTE's reader service answers over 100,000 reader letters seeking advice or information from every year – individually and confidentially. No other European magazine has such a close relationship to its readers. The readers read BRIGITTE quite critically. Every sentence is really read and there's always quite a reaction.

Brigitte is competent, reliable and open.

Most important fact is that our readers say: "Brigitte gets its content right." This trust we have to keep on earning with every issue. Every Brigitte editor knows her field inside out. BRIGITTE has respect for every lifestyle of a woman. Also because these lifestyles can be very changeable – the suburban housewife with two children today might be the single mother with her own boutique in Berlin tomorrow.







The strength of BRIGITTE extends beyond the magazine

Examples for the enormous communications power of the BRIGITTE brandname

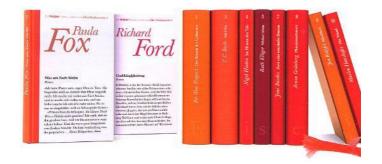
Audio books "Strong Voices":

The first books on CD in the BRIGITTE Edition were a great success: for weeks, the "Strong Voices" series had dominated the bestseller lists. To date, "Strong Voices" have over 1.5 million copies. Six of the "Strong Voices" were awarded a golden record. A continuation has been running since April 2006.

Brigitte Book Edition:

The Edition consists of 26 volumes that were released by BRIGITTE every two weeks until August 2005. The books are personal recommendations by Elke Heidenreich, Germany's most popular woman literature expert. The volumes appear in expensive hard-cover form with an integrated bookmark. 1.5 million copies of the first 10 volumes have already been sold.









BRIGITTE Woman. A trendsetter for a whole market



BRIGITTE Woman first appeared as a special issue, because women in the editorial staff had the feeling that, "we simply have to make such a magazine." Market researchers had always told us, "you can never make such a title, you can't make a magazine that says: for women aged over 40. The topic of age is taboo, that would never be a success." Well, we indeed made such a title and the result is a magazine that has been a sensational success. Nowadays, every publisher is talking about Best Agers and trying to develop an appropriate concept. But it first came from BRIGITTE."

Luxury brand awareness and money to spend: The BRIGITTE WOMAN readers have refined tastes. and take time to pursue their own interests.







BRIGITTE Woman. Inside























BRIGITTE Balance. The nicest way to find oneself.



BRIGITTE Balance is for the rush hour of life where one has to juggle between numerous options, and would like to be the master of his own life. To have a healthy life but to party as well. To enjoy both a career and a family.

BRIGITTE Balance is located where the many elements of modern life come together: between job and leisure, body and soul, fitness and relaxation, love and independence. Founded in 2004, 4 times a year.

BRIGITTE Balance readers are women aged 20 – 49 who are open-minded and full of curiosity, who also think about themselves – without having a guilty conscience.





WOMAN. The lifestyle magazine



WOMAN, the young lifestyle magazine among the classic fortnightlies, combines lifestyle with service in a unique, unmatched style. WOMAN represents a new generation of women:

Employed, around 30 years old, high purchasing power, active and opinion-forming in their personal sphere. Women who often juggle the challenges of job and a young family, and who have specific expectations regarding themselves and their surroundings.

Women that can otherwise only be reached by the monthly women's magazines. But who, thanks to WOMAN's fortnightly frequency, can now be reached much faster! And also in a higher circulation than most monthlies (always over 300,000 copies).





► Women's Magazines from Gruner + Jahr

WOMAN. Inside





















GALA. The premium people magazine.



Every week since 1994, GALA has provided serious, competent and reliable reports about prominent personalities from around the world.

GALA attends all the celebrations and important social events that really matter to high society. GALA is entertaining and stimulates emotions. It draws welcome attention to itself with its well-researched interviews. Its dazzling photo spreads are designed to build a lasting relationship with the stars that is based upon intimacy and respectful distance.

GALA stands for glitter, glamour and an opulent visual language.

And: Gala is international.





GALA. Inside





















A new style concept

Gala Style Guide

Every week, the latest fashion and beauty trends will be presented in GALA's "Style Guide" section, which will comprise a minimum of 20 pages. Every section will start off with the "Look of the Week "

GALA's style concept reflects an exceptionally high fashion competence and underscores its unique position in the people magazine segment. The topic of beauty will of course also benefit from this new concept and layout. Fashion as well as beauty will be presented on an extremely high aesthetic level, and will meet the very high expectations that the readers have regarding these important areas of their lives!















In a class of its own. The GALA special issue

The new "STYLE GUIDE" from GALA:

An extensive guide through the latest trends in fashion, beauty and the art of living. Accurately and thoroughly researched, close to the VIPs, and with a high service and entertainment value for the cosmopolitan and trend-oriented reader. The new GALA Style Guide will be visually luxurious and presented.

Published two times a year.







EMOTION. Unique and different



Psychology magazines for women are already successfully established in France, Italy, Spain, the Netherlands, UK and the USA. Now this winning concept is came to Germany as well:

EMOTION is the only German magazine that is the only woman's magazine that looks at the areas of partnership, family, career and personality from a psychological point of view.

EMOTION stands out through an opulent optical language and stories of persons with whom the readers can readily identify. The articles are extensively researched, and backed up by expert opinions and service offers. The readers are well-off, intelligent women that are looking for more than the surface.

A coach for life of modern women.





► Women's Magazines from Gruner + Jahr

EMOTION. Inside



















Eltern



ELTERN is an in-depth, comprehensive guide for young women at a period of great changes in their lives; it gives emotional support, builds confidence, contentment and a sense of achievement.

ELTERN provides its companionship for 40 years, now. From pregnancy to children aged three to four, it informs and advises its readers in all aspects of family life. In ELTERN, the reader finds out what "having a family" is all about, and how the years spent with a small child can be the most rewarding of all.

The market leader. ELTERN has the highest circulation and the highest coverage of all monthly parent's magazines in Germany.





► Women's Magazines from Gruner + Jahr

ELTERN. Inside















HEALTHY LIVING



Focuses on one of today's hottest topics.

Started September 2006, there is finally a magazine in Germany that is written especially for women who are interested in healthy living.

Good health affects all areas of modern living: Topics from body and soul, beauty and nutrition, prevention and cure, up to leisure pursuits, travel and family.

HEALTHY LIVING offers a pleasant atmosphere of well-being, coupled with a solid basis of scientifically-documented information on health.





► Women's Magazines from Gruner + Jahr

HEALTHY LIVING. Inside























Examples of the Gruner + Jahr online sites

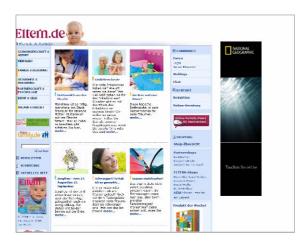
www.brigitte.de



Particular Service Nation of Service S

www.emotion.de

www.eltern.de





www.gala.de























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