



AFTER A FEW WEEKS IN LOCKDOWN, GERMANY IS READY TO CAREFULLY ENTER THE NEXT PHASE ON OUR JOURNEY TO 'NORMAL'

- With some restrictions slowly being eased over the next few weeks, we can start to think about the future
- This next phase will be critical for brands to keep connecting & supporting consumers.
- In this weeks perspective, we look at the current moods, trends & expectations, as well as guidance from previous situations

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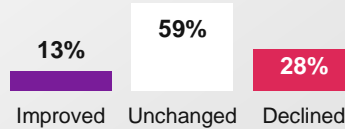
#1 JOURNEY TO THE NEW NORMAL

Ever since the outbreak started, over 95% of Germans **miss something from their old lives.**

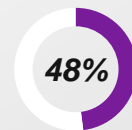


Friends, restaurants & travel form the top-3.

72% of German Adults believe their **financial situation will stay unchanged** or improve in the next 3 months

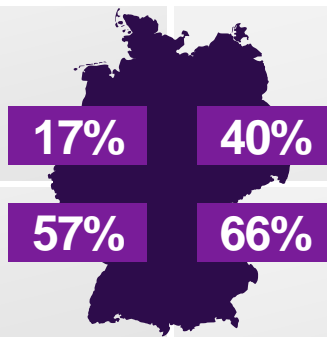


48% of German adults think the COVID situation has **strengthened the sense of community & togetherness** in society



#2 ANALYZING THE WAY OUT

Compared to countries like Spain (35%), Italy (31%) and France (23%), Germans (17%) **feel much less impacted in their financial situation** by the Corona Virus outbreak.



Although some purchases may be delayed during the crisis, over 40% of Germans **haven't delayed anything yet**, indicating confidence in the outcome & their position

of Germans are **watching more news** during the crisis and are expecting to do so after it is over. Radio, streaming & TV are also strongly up, and key to include in media plans.

of people are **looking for brands to provide them with funny & lighthearted content** to keep them entertained & in good spirits during the Crisis

#3 IMPACTS ON THE AD MARKET

LEARNINGS FROM THE 2008-2009 FINANCIAL CRIS

In the aftermath of the 2008 financial meltdown, the crisis sustained in the ad market was 2 quarters shorter and not as severe compared to the overall economic crisis, in addition to recovering faster.

In the current crisis, advertisers should be prepared for faster normalization of the ad market and prepare their activities

AD REBOUND & OVERCOMPENSATION

In 2009, the year after the financial crisis there was an under-investment in the ad market, resulting in an over-compensated ad market in 2010 when everyone wanted to invest again.

Based on this learning we can expect competition for the best ad placements after the current crisis to grow.

TV COST-PER-GRP (TEMPORARILY) OPTIMAL

At the moment, TV sales houses in Germany have not yet adapted their GRP pricing to the increased TV audiences that are viewing at home.

In turn, this has made the cost-per-GRP much more attractive for advertisers, and an opportunity for those who activate their plans right now.

IN SUMMARY, 3 KEY IMPLICATIONS FOR BRANDS MOVING FORWARD!

Anticipate media touchpoint relevancy in suppression phase
OUT-OF-HOME / SOCIAL MEDIA / NEWS

Keeping up ad investments pays off; be prepared for fast recovery & ad boom

Aim to offer a sense of normalcy in abnormal times & help retain the good