

YouGov

GERMANY



Media landscape report

Understanding the evolving media
landscape in Germany.

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The evolving media landscape in Germany

How has media consumption changed over recent years, and which media types have seen the most significant growth?

Leveraging YouGov Profiles, an ever-growing source of living consumer data, this report explores shifts in the media habits of German consumers across all age groups. It examines the shifting consumer habits for news, social media and television media channels, as well as delving into the key profile demographics of German consumers who are ad receptive versus those who are ad resistant.

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Methodology

The profile insights in this report are drawn from **YouGov Profiles**.

YouGov Profiles is an ever-growing source of living consumer data, with 2 million+ data variables from YouGov's 26 million+ global panel members. YouGov Profiles dataset is a 52-week dataset, our data is collected continuously and updated weekly. The dataset used for the analysis are:

- Profiles+ Germany 2020-03-29 (52-week average) – English
- Profiles+ Germany 2022-03-27 (52-week average) – English
- Profiles+ Germany 2023-03-26 (52-week average) – English
- Profiles+ Germany 2024-03-31 (52-week average) – English

Ad receptive are defined as respondents who agrees that advertising helps them choose what they buy.

Ad resistant are defined as respondents who disagree that advertising helps them choose what they buy.



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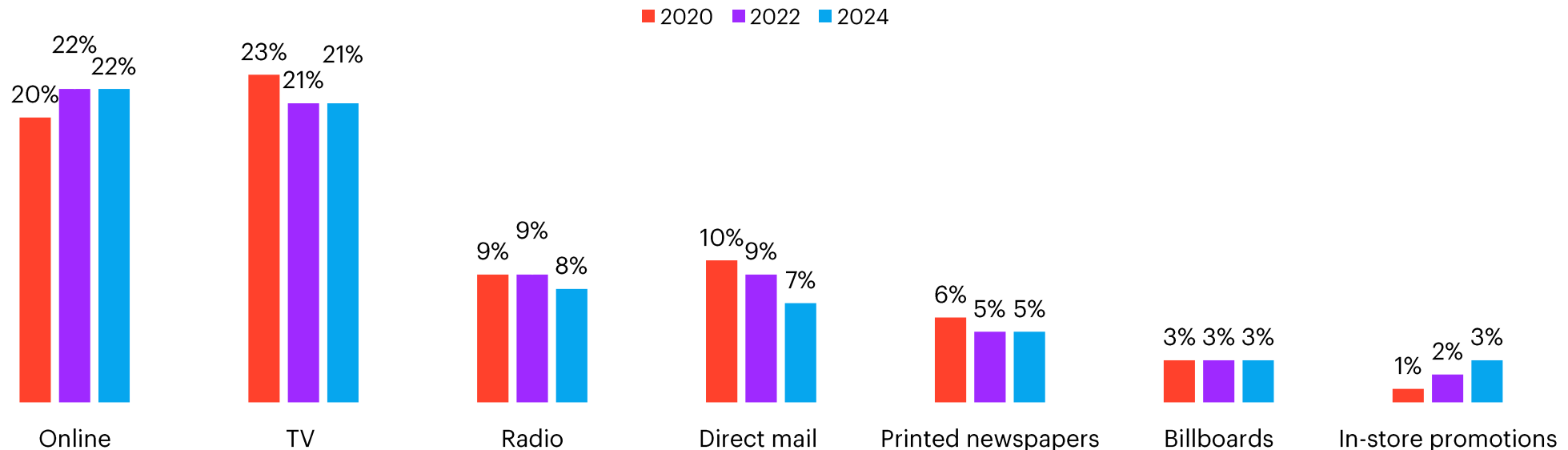
Part 1: Advertising trends



Online has overtaken TV as the main advertising channel that grabs attention for German respondents

22% of respondents now say online is the main advertising channel that grabs attention, closely followed by television (21%).

Main advertising channel that grabs attention




























However, television still outranks online among older German audiences

Those aged 45+ rank television as the main advertising channel that grabs attention.

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2024: Profiles+ Germany 2024-03-31, 52-week average. (n>1,000).

Top 5 advertising channels that grab attention by age group

Rank	18-24	25-34	35-44	45-54	55+
1	 (32%)	 (36%)	 (28%)	 (23%)	 (27%)
2	 (14%)	 (15%)	 (18%)	 (18%)	 (12%)
3	 (6%)	 (7%)	 (10%)	 (10%)	 (11%)
4	 (5%)	 (4%)	 (4%)	 (6%)	 (8%)
5	 (4%)	 (3%)	 (4%)	 (4%)	 (7%)



Online



Printed newspaper



TV



Radio



Direct mail



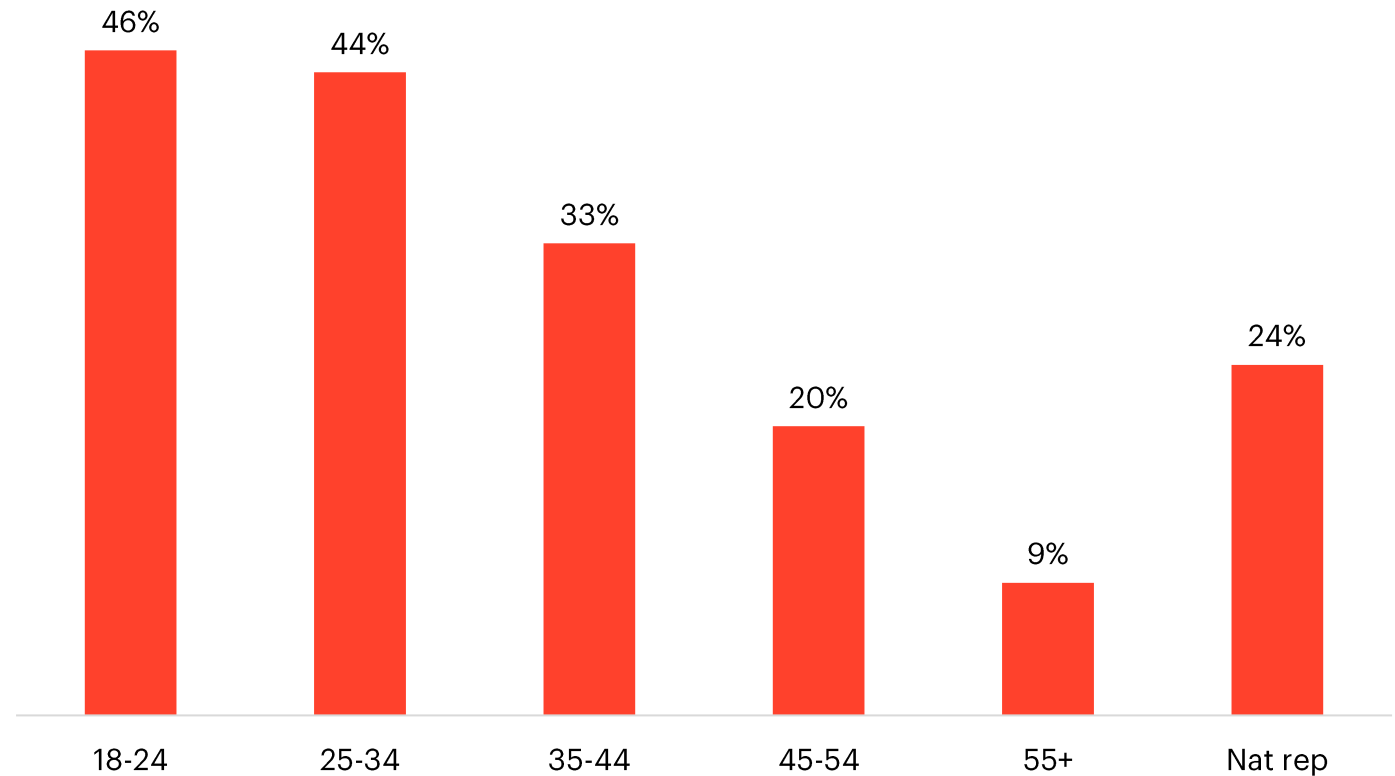
Billboards

46% of those aged 18-24 agree they are more likely to engage advertisements on social media than on regular websites

Compared to 24% of all German respondents.

2024; Profiles+ Germany 2024-03-31, 52-week average

Agree: "I'm more likely to engage with advertisements on social media than on regular websites"

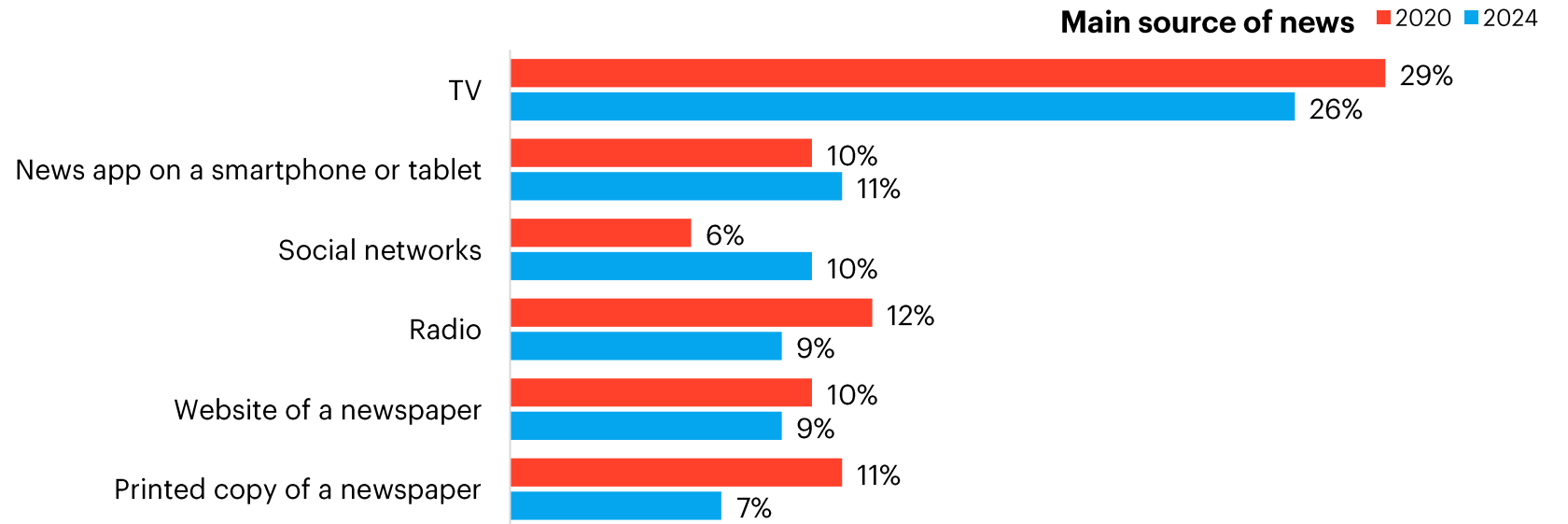


Part 2: News consumption trends

A photograph of a man with grey hair and glasses, wearing a brown vest over a plaid shirt, sitting at a wooden table in a cafe. He is reading a newspaper. On the table in front of him is a red coffee cup on a saucer and a smartphone. The background shows a blurred cafe interior with other tables and chairs.

Television is the main source of news among German respondents

While still holding the top spot, TV declined by 3 percentage points since 2020.

















2024: Profiles+ Germany 2024-03-31, 52-week average. 2020: Profiles+ Germany 2020-03-29, 52-week average. (n>8,900). Nat rep.





Social networks are the leading source of news for audiences aged under 35




Older age groups (35+) favour traditional TV broadcasts, underscoring a preference for established media. Social networks rank lower among those aged 35+, while news apps on a smartphone or tablet perform higher among those aged 25-34.

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2024: Profiles+ Germany 2024-03-31, 52-week average. (n>650) Nat rep.

Rank	18-24	25-34	35-44	45-54	55+
1	 (19%)	 (16%)	 (17%)	 (30%)	 (39%)
2	 (12%)	 (16%)	 (13%)	 (11%)	 (12%)
3	 (10%)	 (13%)	 (13%)	 (11%)	 (11%)
4	 (7%)	 (11%)	 (12%)	 (10%)	 (8%)
5	 (7%)	 (7%)	 (10%)	 (6%)	 (7%)

 Social network websites
  Television
  A news app on a mobile or tablet device
  Listened to radio

 A printed copy of a newspaper
  A news website not associated with a newspaper
  A newspaper's website

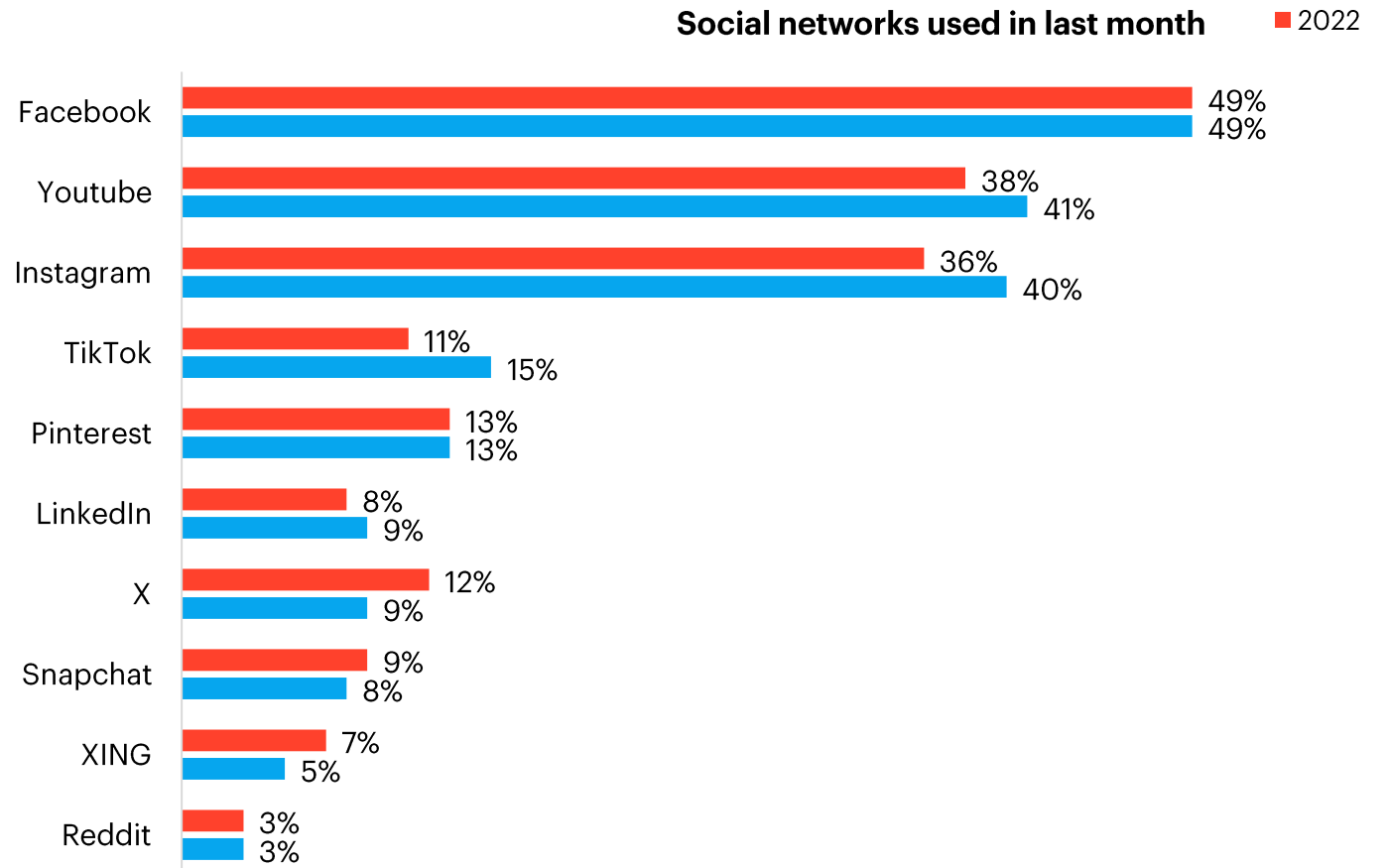


Part 3: Social media usage trends

Almost 1 in 2 respondents used Facebook in the last month

YouTube, Instagram and TikTok have recorded significant growth since 2022, up 3pp, 4pp and 4pp respectively.

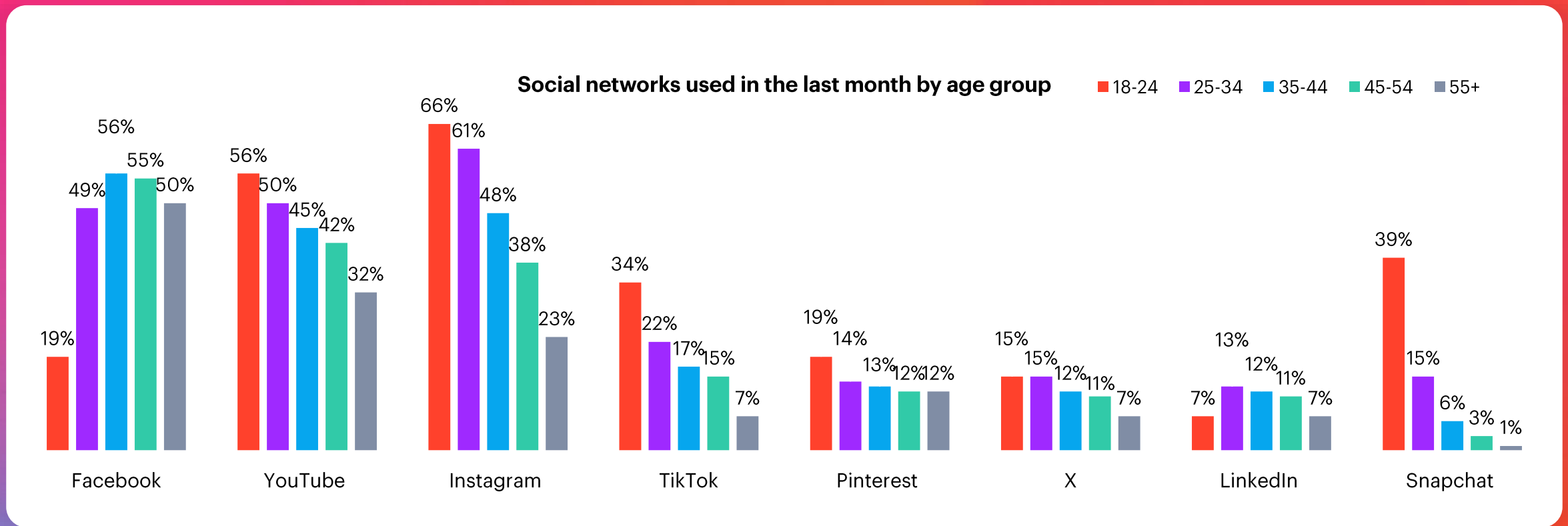
[Run a survey >](#)



2024: Profiles+ Germany 2024-03-31, 52-week average. 2022: Profiles+ Germany 2022-03-27, 52-week average. (n>27,300). Nat rep.

Younger age groups are significantly more likely to use Instagram, TikTok and Snapchat in 2024

Facebook drives greater usage among older audiences, with 55% of those aged 45-54 using the platform in the last month.



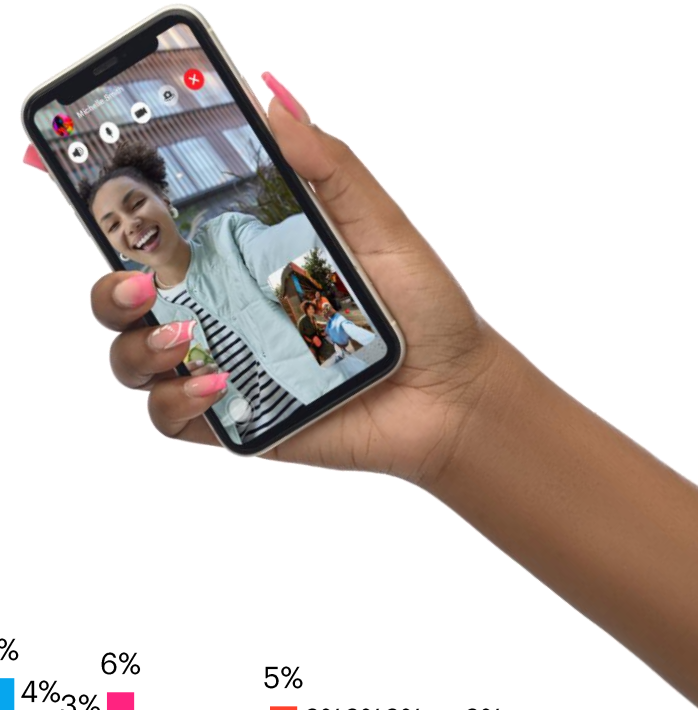
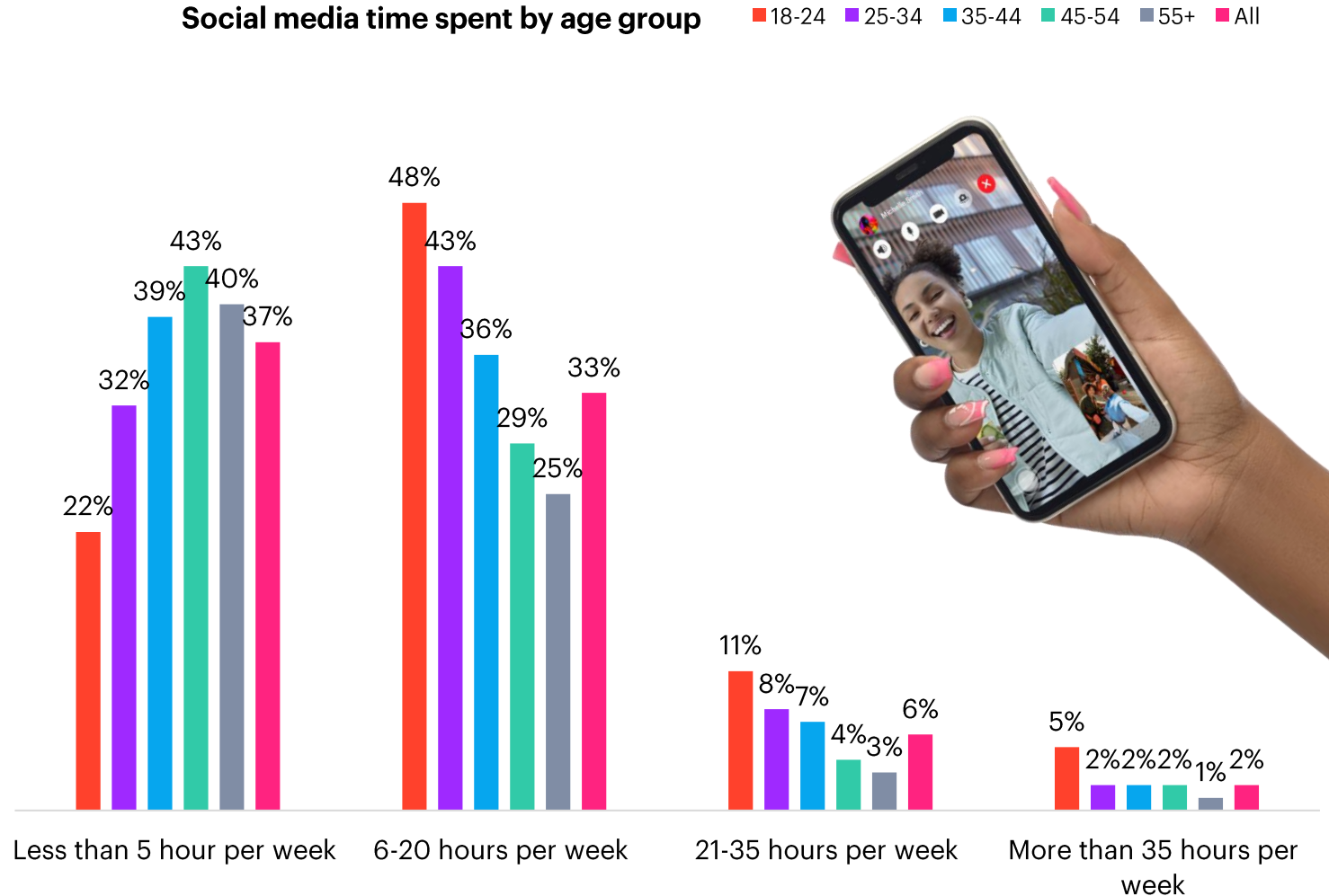
1 in 3 Germans spend 6-20 hours per week on social media

41% of people spend over 6 hours on social media per week. However, among the younger generation (18-24), this figure jumps to 64%, while only 29% of those aged 55 and older spend the same amount of time on social media.

[Run a survey >](#)

2024: Profiles+ Germany 2024-03-31, 52-week average.
(n>1,400)

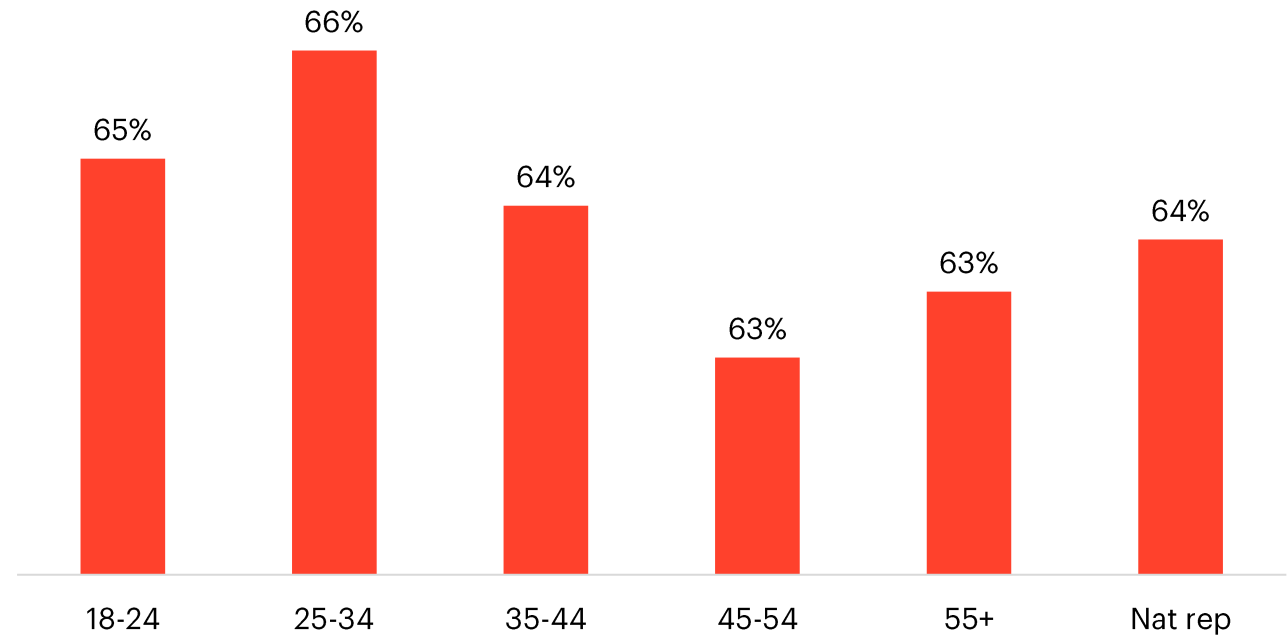
Social media time spent by age group



64% agree “keeping in touch with family and friends” is a key reason for using social media

[Explore more data >](#)[Get in touch >](#)

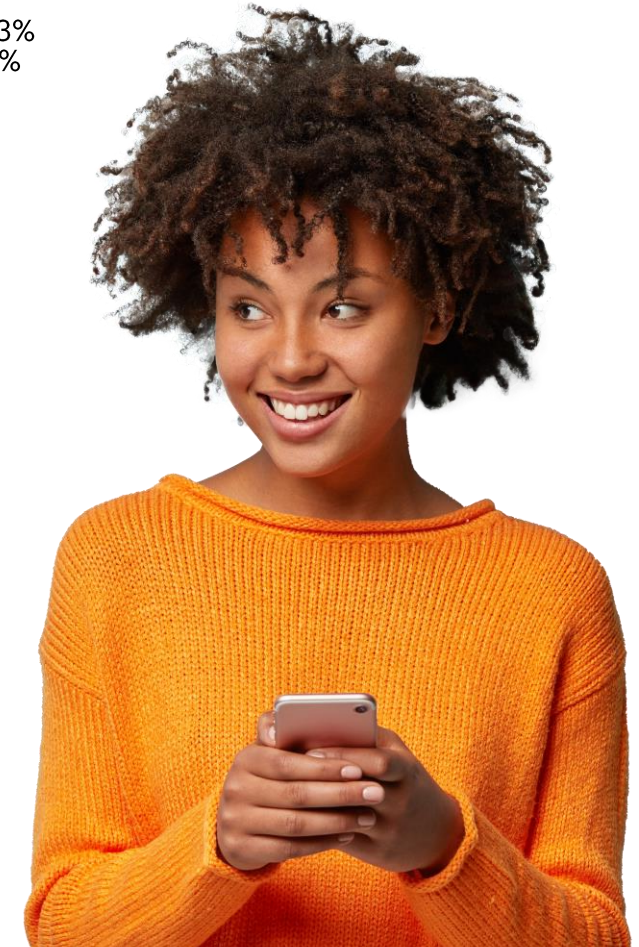
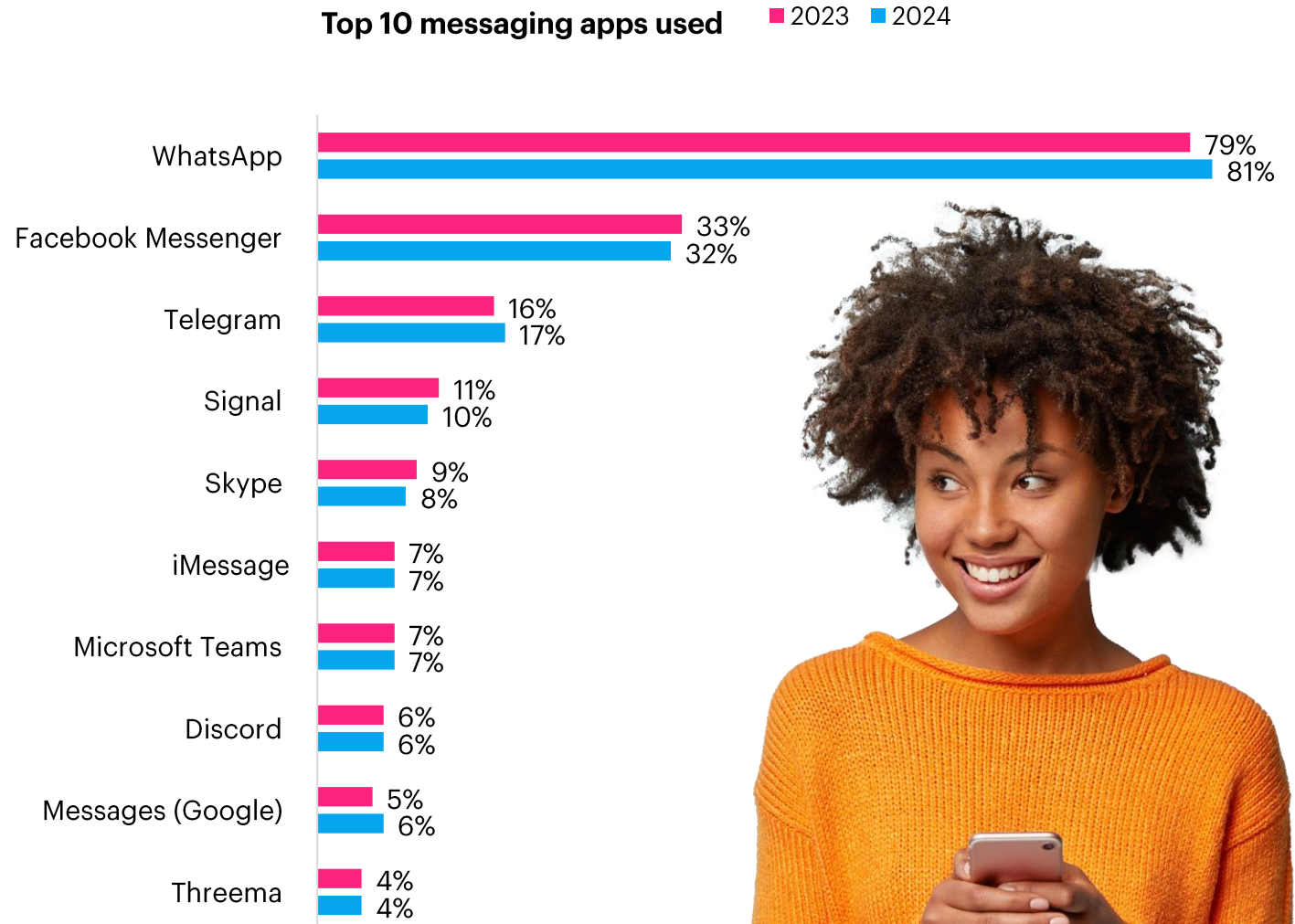
Agree: “I mainly use social media to keep in touch with friends and family”



WhatsApp dominates the field for messaging app usage

WhatsApp has maintained its position as the leading messaging app, showing year-on-year growth. Facebook Messenger, Signal and Skype showed a year-on-year decline.

2024: Profiles+ Germany 2024-03-31, 52-week average.
2023: Profiles+ Germany 2023-03-26, 52-week average.
(n>28,400). Nat rep.



Discord is popular among those aged 18-24

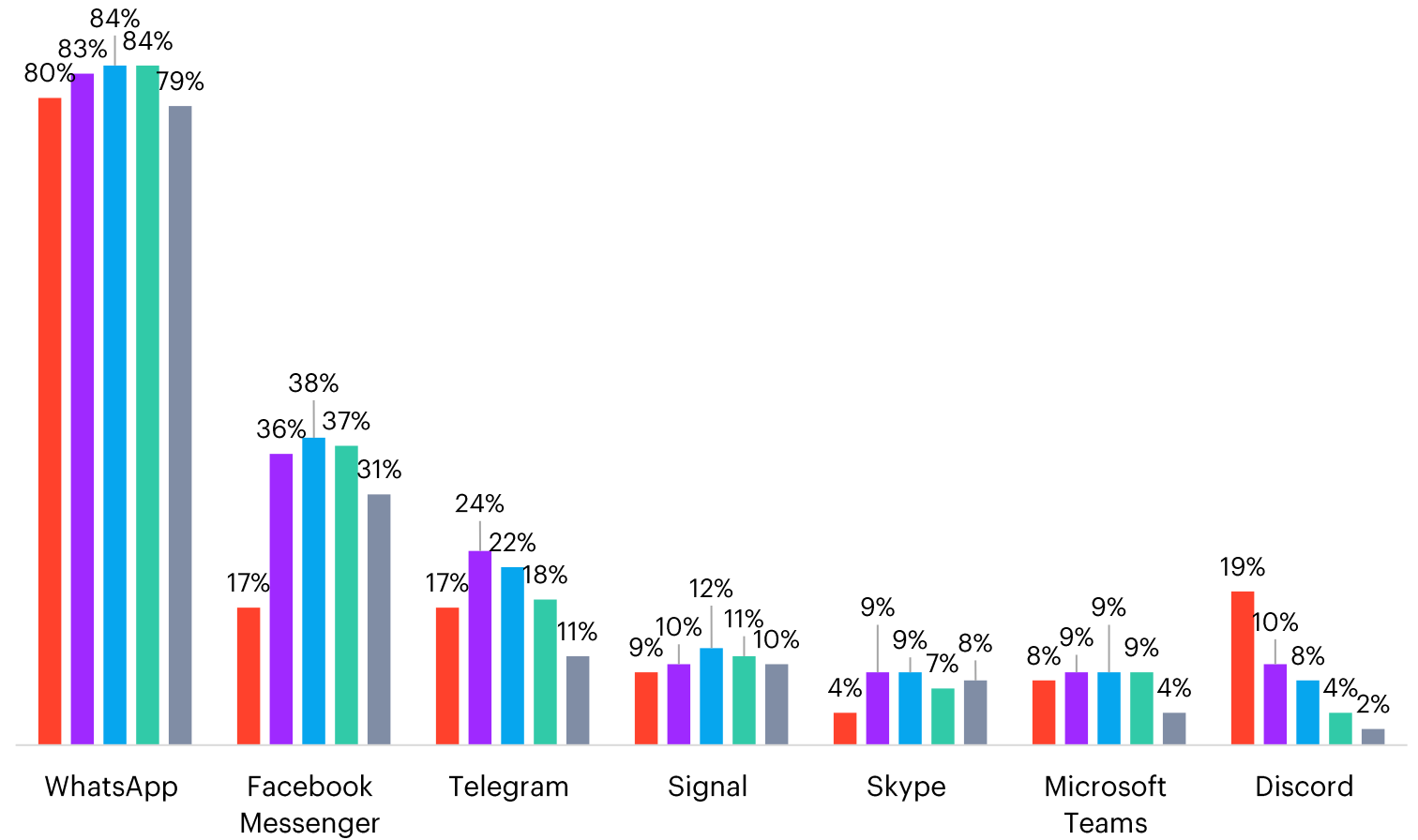
Discord sees higher usage among younger individuals (18-24) at 19%, while Facebook Messenger remains popular among older demographics, particularly those aged 35 and above, with percentages ranging from 31% to 38%.

[Run a survey >](#)

2024: Profiles+ Germany 2024-03-31, 52-week average.
(n>1,400)

Messaging apps used by age groups

18-24 25-34 35-44 45-54 55+



Part 4: TV viewing trends



More Germans watch 6+ hours of live TV per week than on demand

However, live TV viewership for 6+ hours per week has seen a 3pp decline since 2022, while on demand TV has seen a 10pp increase.

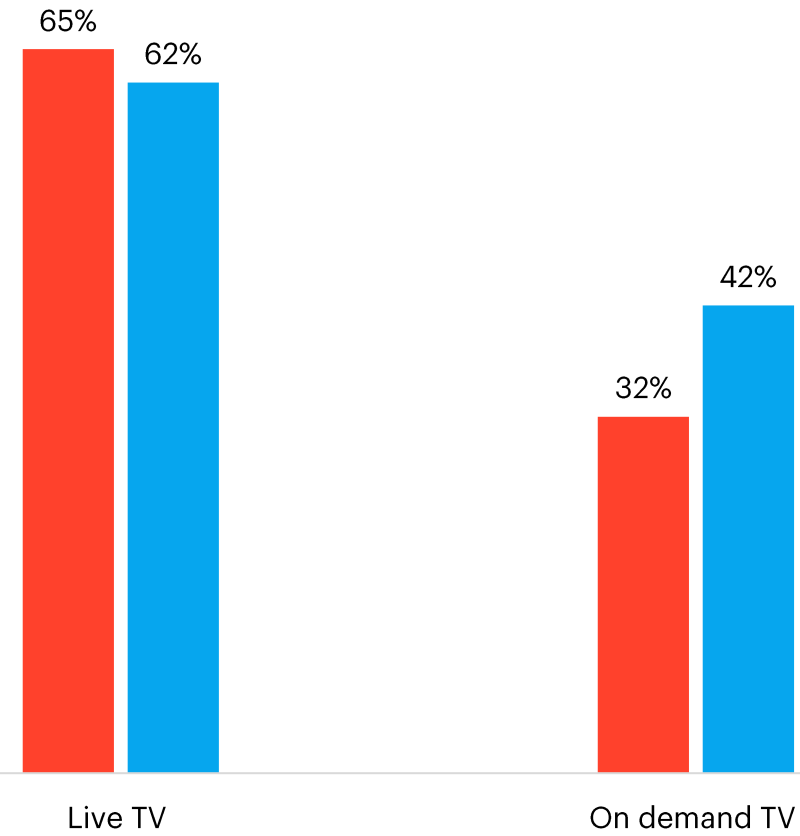
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2024: Profiles+ Germany 2024-03-31, 52-week average.
2022: Profiles+ Germany 2022-03-27, 52-week average.
(n>33,300), (n>19,700). Nat rep.



Watch 6+ hours of TV per week: live versus on demand

■ 2022 ■ 2024



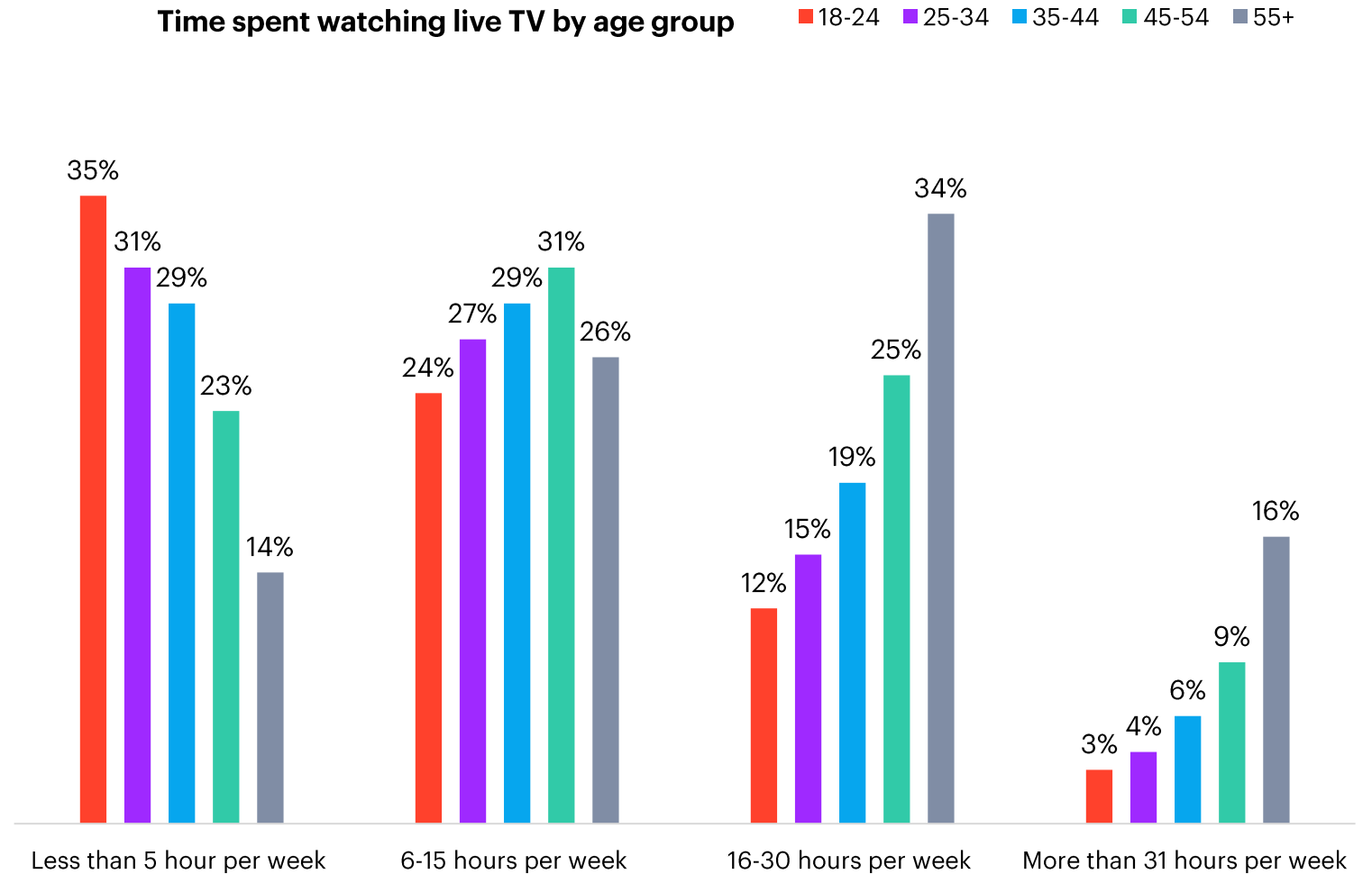
Live TV viewership is being driven by older audiences

16% of those aged 55 and above watching over 31 hours per week, compared to only 3% of individuals aged 18-24.

[Run a survey >](#)

2024: Profiles+ Germany 2024-03-31, 52-week average.
(n>1,900)

Time spent watching live TV by age group



The streaming giants

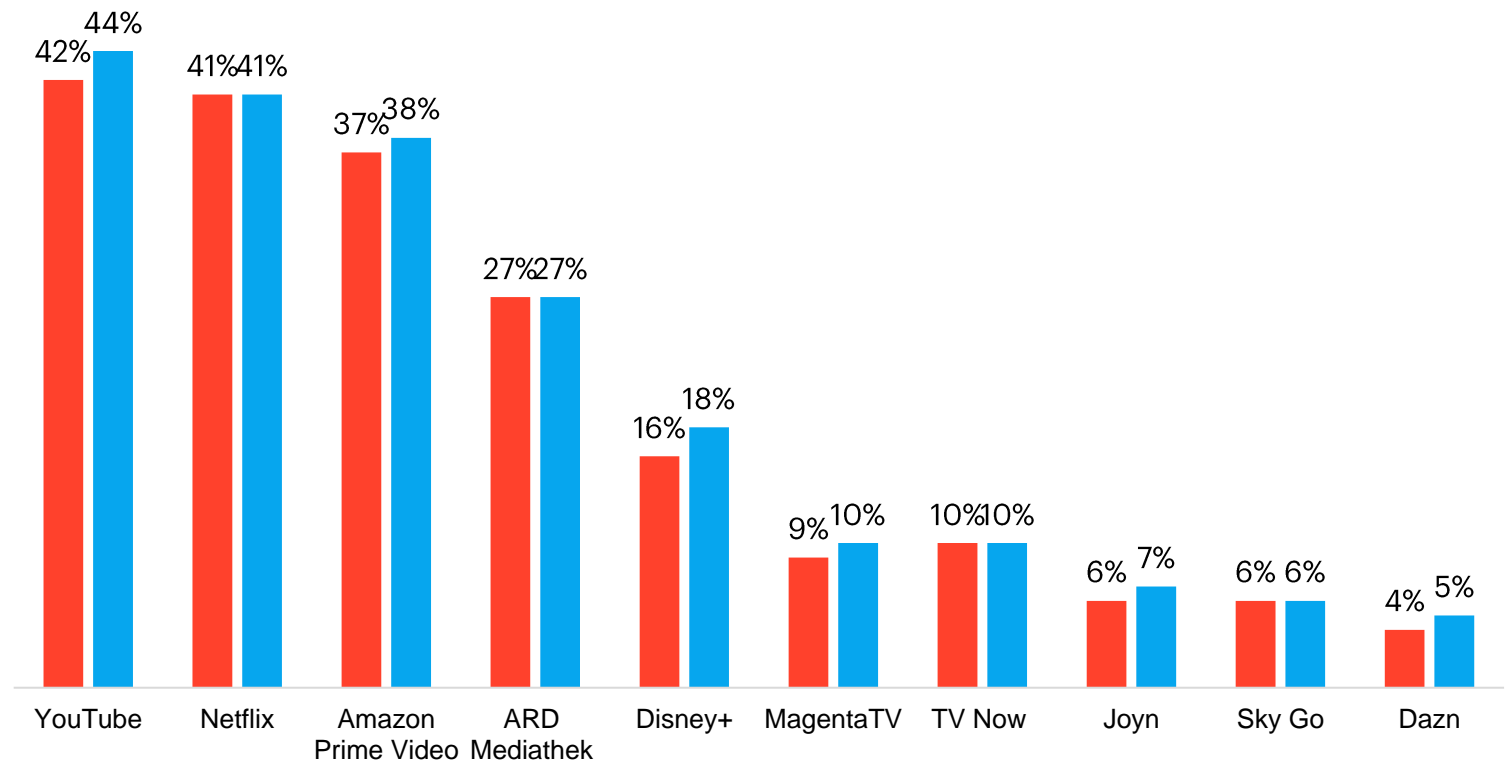
YouTube, Disney+ and Magenta TV streaming services have seen notable growth over last two years among German respondents.

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2024: Profiles+ Germany 2024-03-31, 52-week average.
2023: Profiles+ Germany 2023-03-26, 52-week average.
(n>33,000). Nat rep.

On demand services regularly used year-on-year

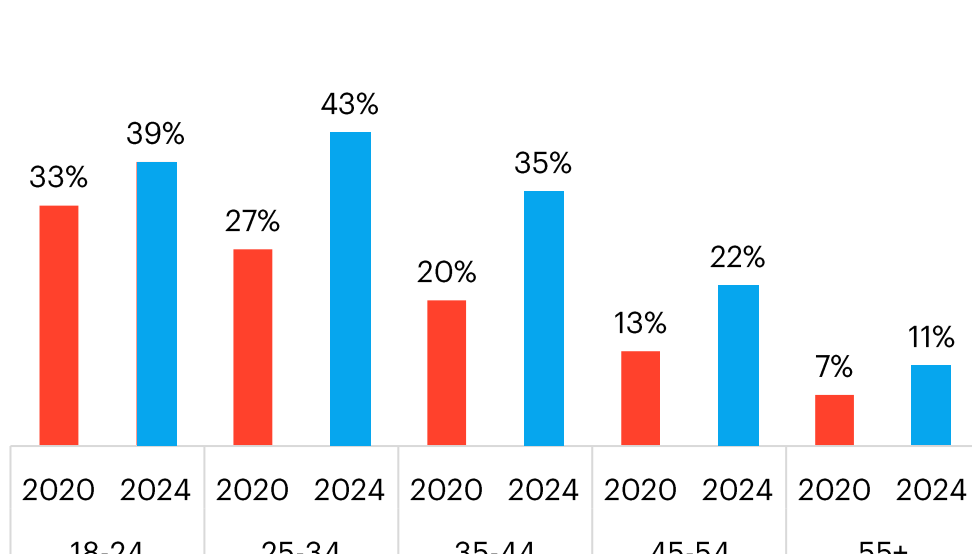
2023 2024



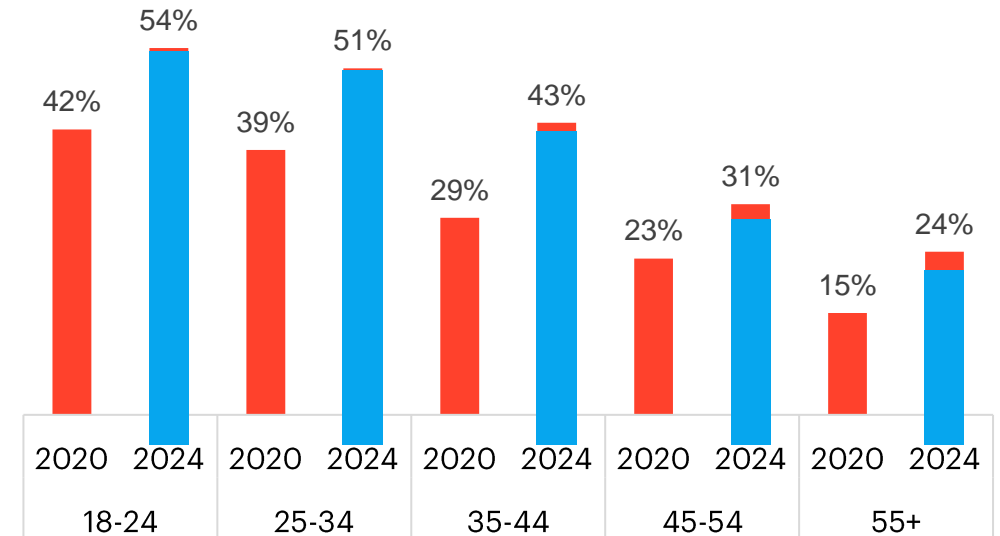
With fees on the rise, attitudes to streaming services are shifting

All age groups saw increased year-on-year agreement with statements such as “I feel I have too many subscriptions” and “it’s fine to share my credentials for streaming services.”

Agree: “I feel I have too many subscriptions.”



Agree: “It’s fine to share my credentials for video and music streaming services with everyone.”



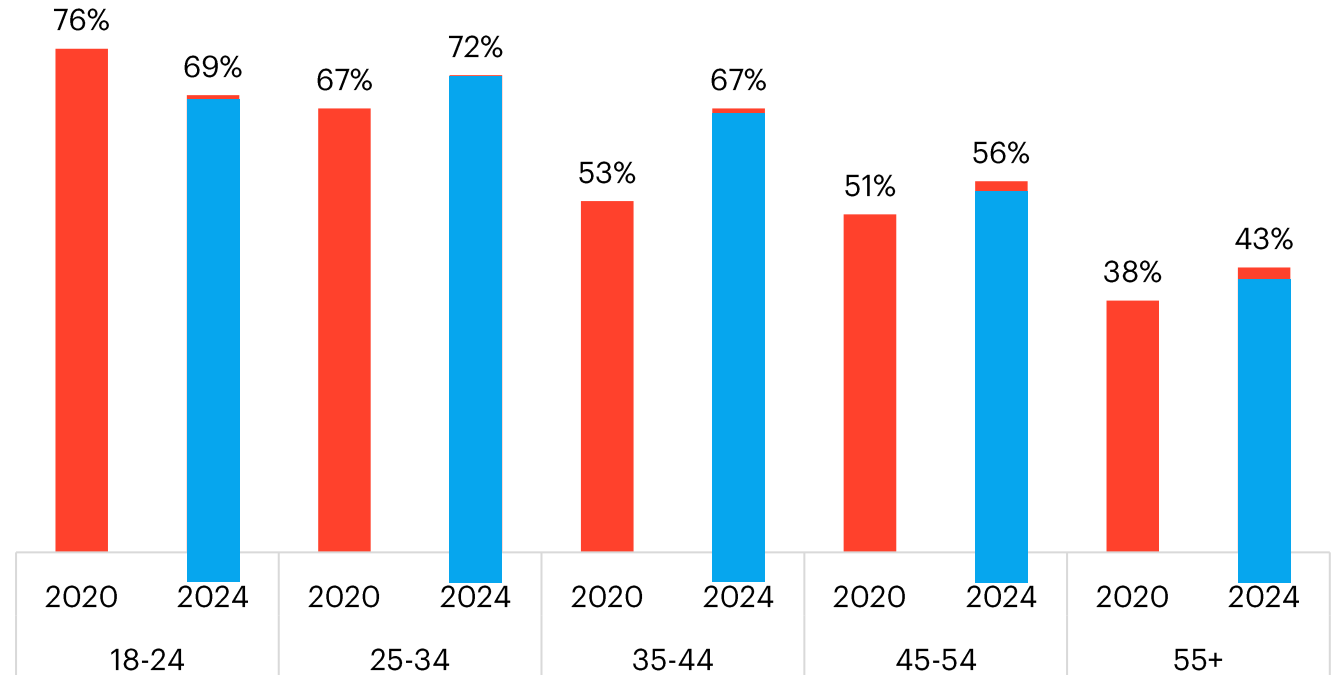
2024: Profiles+ Germany 2024-03-31, 52-week average.

2020: Profiles+ Germany 2020-03-29, 52-week average (n>130)

Most age groups increasingly agree that video and music streaming services should offer group subscriptions

[Explore more data >](#)[Get in touch >](#)

Agree: "Video and music streaming services should offer more group subscriptions."



2024: Profiles+ Germany 2024-03-31, 52-week average.
2020: Profiles+ Germany 2020-03-29, 52-week average (n>130)

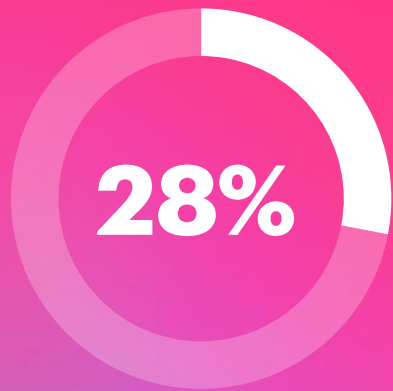
Profile deep dive: Ad receptive vs. ad resistant

Ad receptive: Agree “Advertising helps me choose what to buy.”

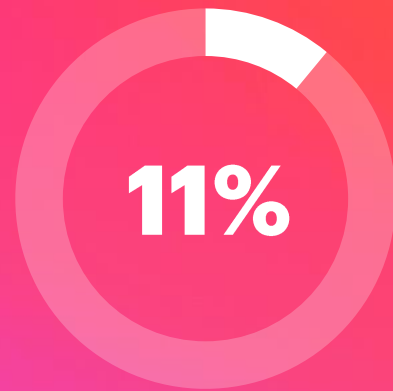
Ad resistant: Disagree “Advertising helps me choose what to buy.”

Germans are predominantly ad resistant, with only 28% agreeing that advertising helps them choose what to buy

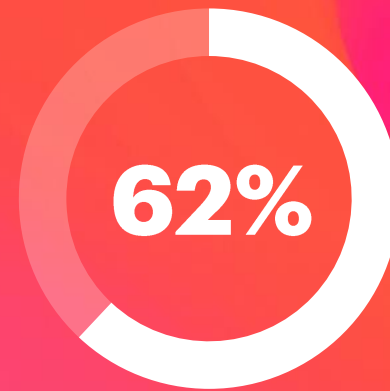
"Advertising helps me choose what to buy."



Agree



Neither agree nor disagree



Disagree

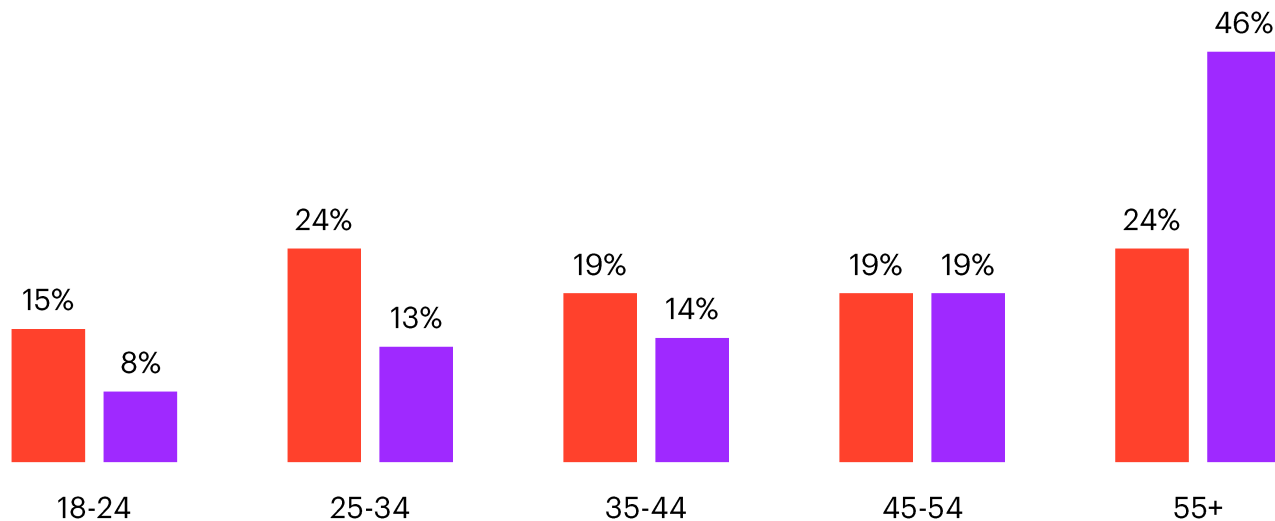


Ad receptive are significantly more likely to be younger

In comparison to those who are ad resistant.

Attitude to advertising by age group

■ Ad receptive ■ Ad resistant

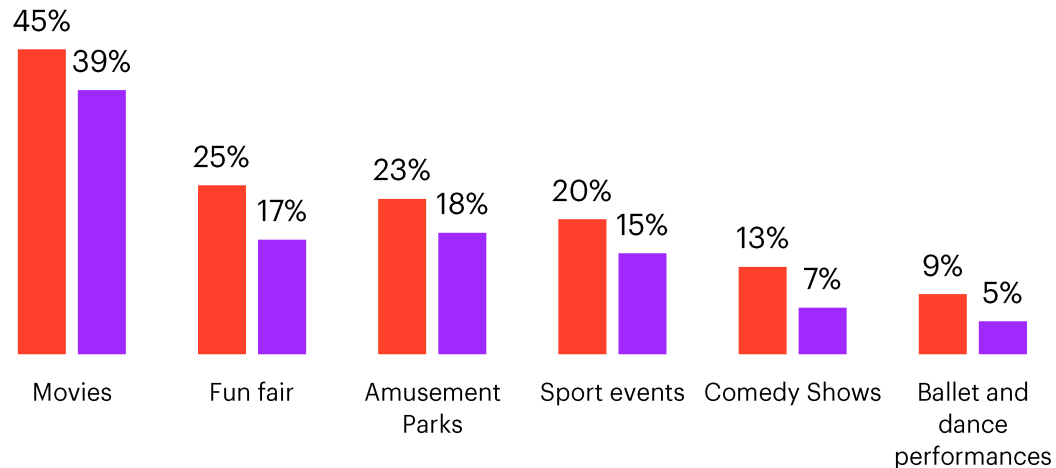


Ad receptive are more likely to enjoy the movies and fun fairs compared to those who are ad resistant

Those who are ad resistant are more likely to prefer restaurants, parks and historical sites.

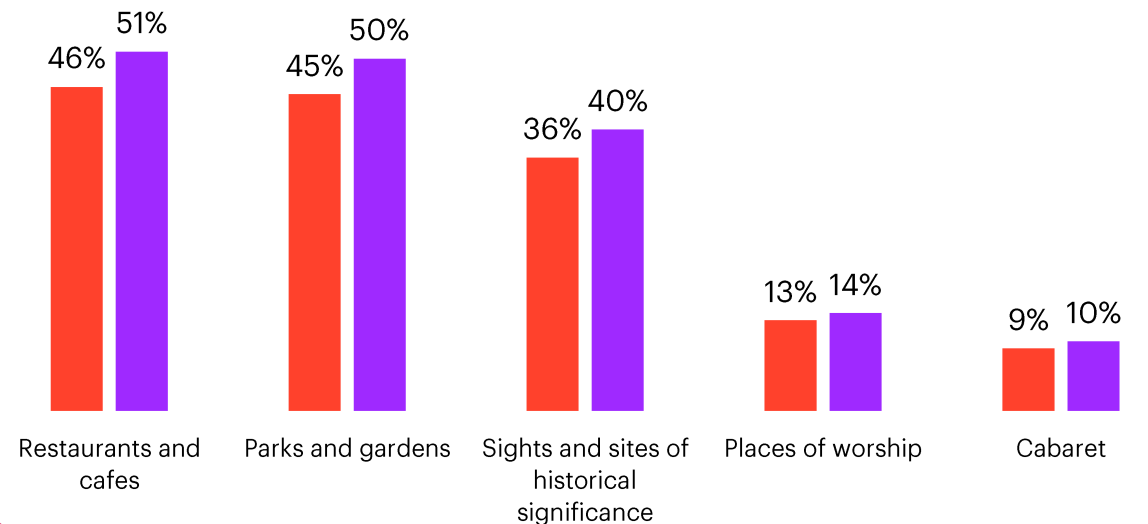
Activities preferred by ad receptive compared to ad resistant

Ad receptive Ad resistant



Activities preferred by ad resistant compared to ad receptive

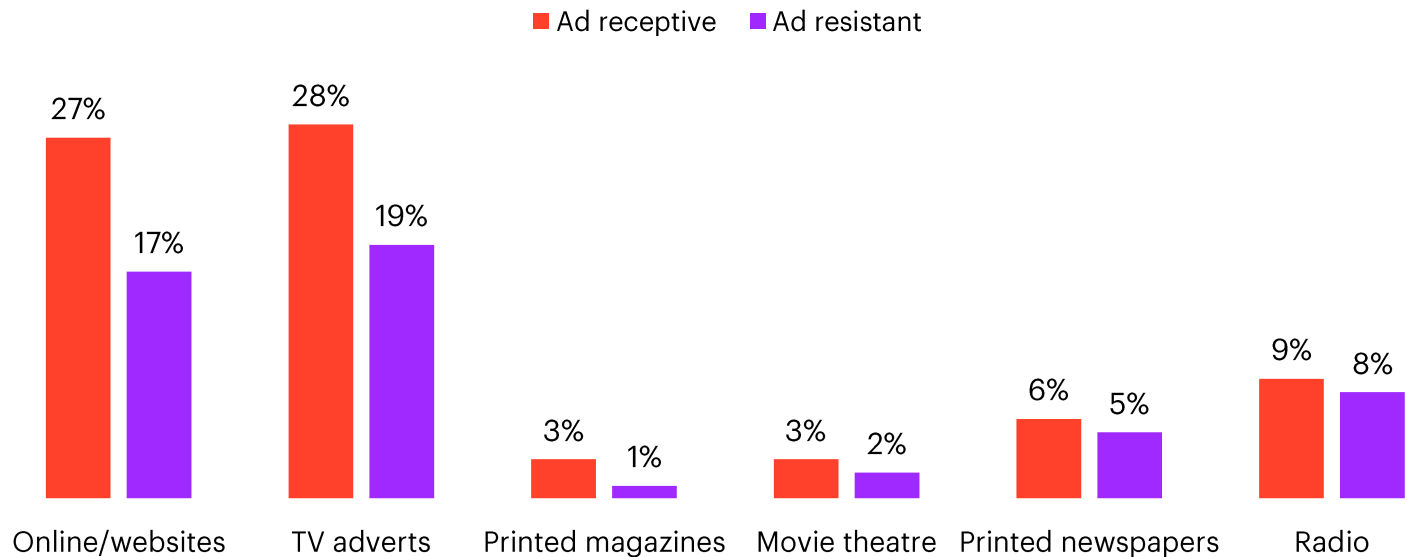
Ad receptive Ad resistant



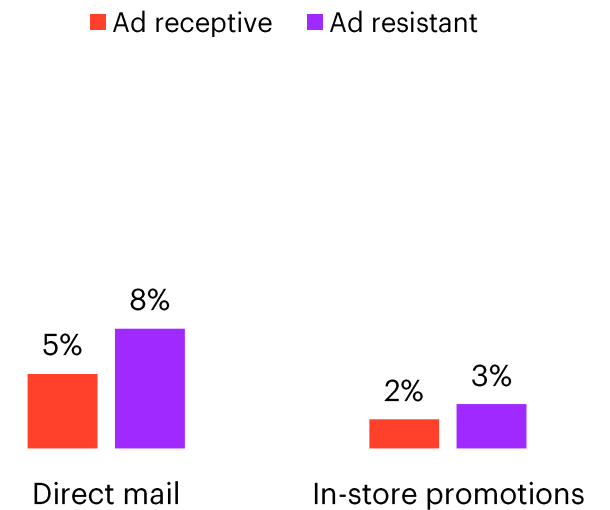
Ad receptive are more likely to find online and TV advertisements attention grabbing than those who are ad resistant

While those who are ad resistant are more likely to find direct mail and in-store promotions more attention grabbing.

Main advertising channel that grabs attention among ad receptive



Main advertising channel that grabs attention among ad resistant



Want a deeper analysis?

With YouGov Profiles, you can dig deeper into the media consumption habits and attitudes of virtually any target audience including:

- Customers of a particular brand
- Category considerers
- Affinity audiences

For trending insights, run a YouGov Surveys to get quick answers to inform your media strategy:

- Self-serve and Serviced surveys
- Granular audience targeting
- Results in as little as 24 hours

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Thank you

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