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The German Media Landscape

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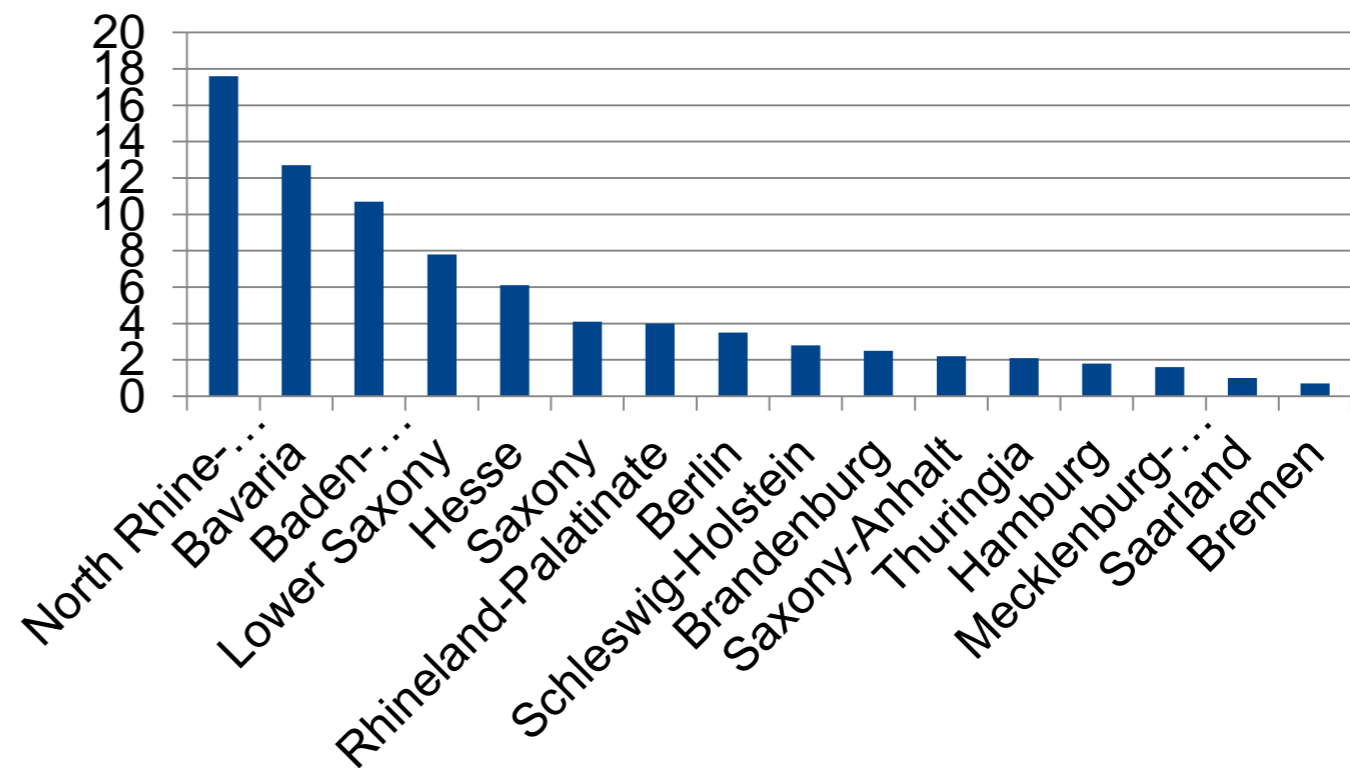
*President of the Media Authority Baden-Württemberg (LFK) and
DLM's Commissioner for European Affairs*

Information about Germany



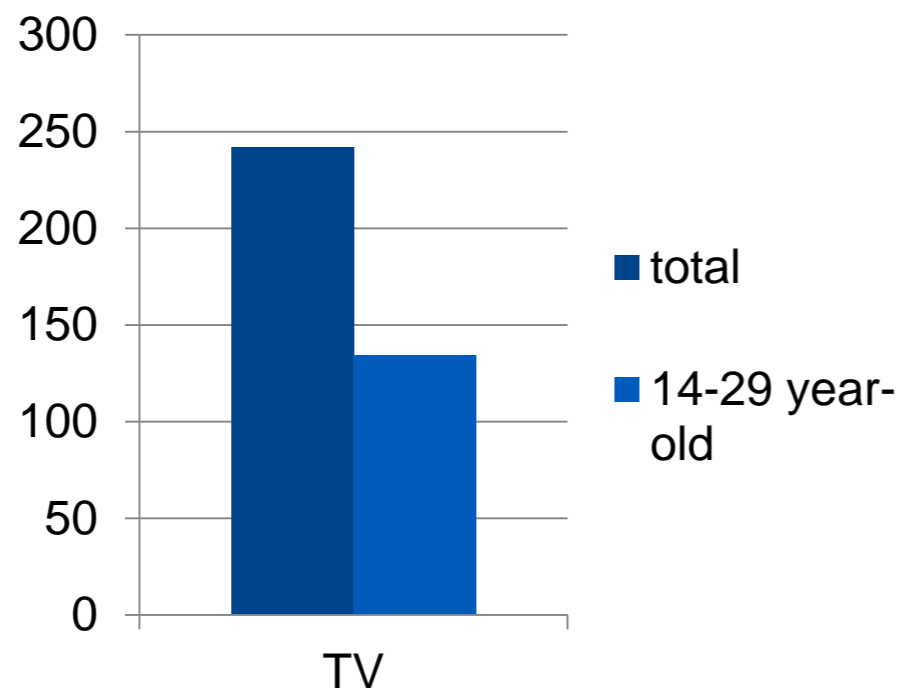
- Overall population: ca. 81 million
- 16 federal states (“Länder”)
- Diverse media landscape

Population per federal state (in mio.)



Broadcasting in Germany (I)

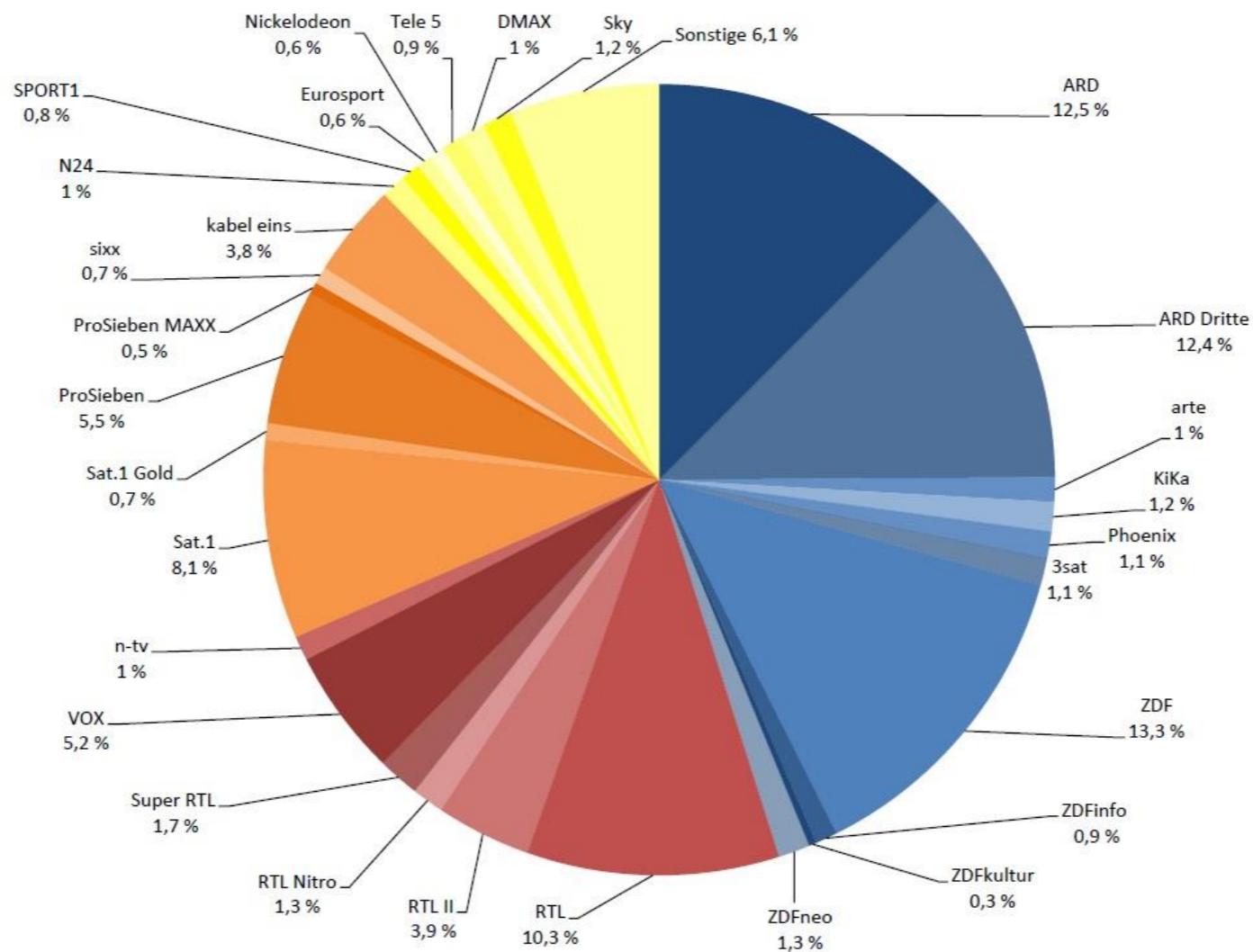
- TV consumption (in min/ day):



- Free-TV-market; Sky has about 3,8 Mio. Subscribers
But: 40% of the HD-household pay a light subscription-fee of about 6 Euro per month for private HD-Programmes

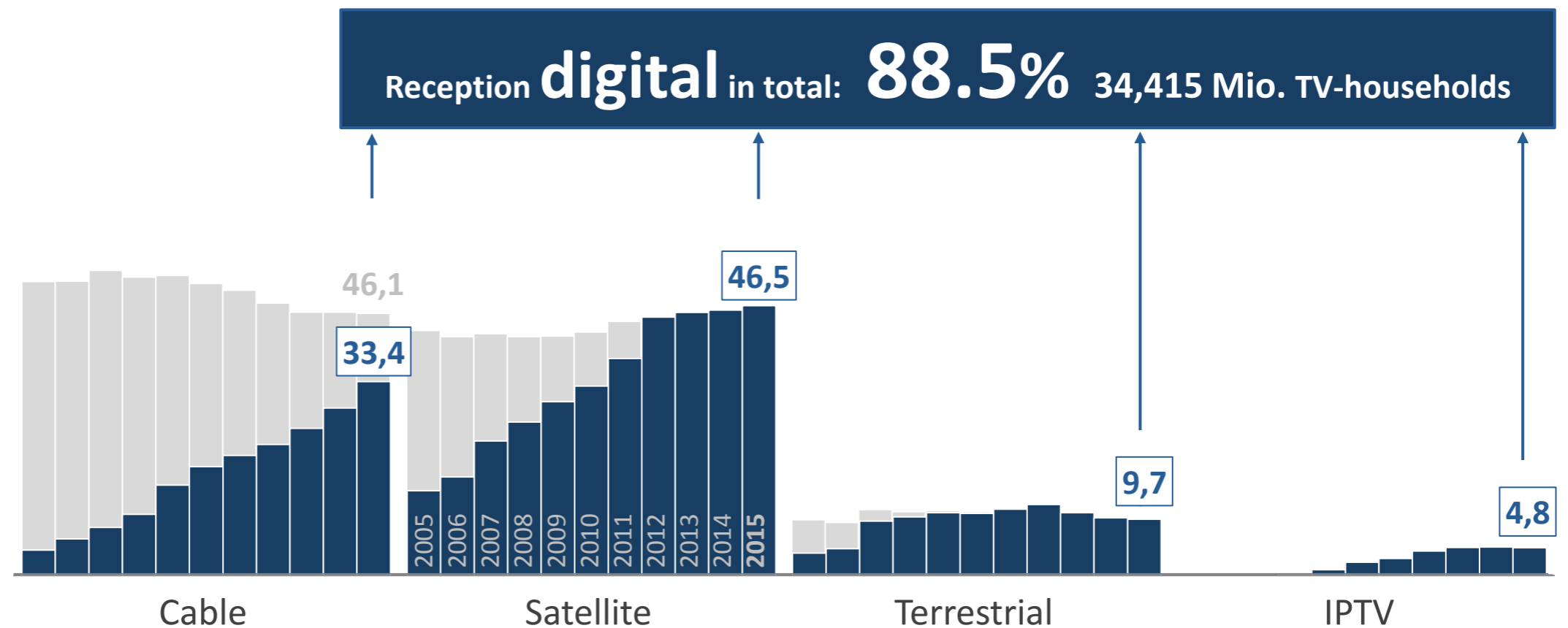
Broadcasting in Germany (II)

- Public broadcasting (ARD and ZDF): since 1949
- Private broadcasting: since 1984



Distribution of transmission ways: Digital

In mid-2015, 88.5% of TV-households receive digital TV.



Figures in per cent; Total amount > 88,5% because of multiple reception

Basis: 33,904 / 33,904 / 36,981 / 37,277 / 37,412 / 37,464 / 37,668 / 37,977 / 38,157 / 38,557 / 38,899 Mio. TV-HH in Germany

Private regional and local TV channels

Allocation of channels according to supervising media authority

	in total statewide TV ¹		local/ regional TV	special providers ³	loc. programmes < 10.000 HH	local TV online
Baden-Wuerttemberg	20	1	13	6	0	0
Bavaria	45	2	18	11	8	6
Berlin/Brandenburg	44	0	29	10	4	1
Bremen	2	2	0	0	0	0
Hamburg/Schleswig-Holstein	9	7	0	0	0	2
Hesse	3	2	1	0	0	0
Mecklenburg-West. Pomerania	14	1	9	0	4	0
Lower Saxony	6	2	4	0	0	0
North Rhine-Westphalia	7	3	4	0	0	0
Rhineland-Palatinate	6	1	5	0	0	0
Saarland	0	0	0	0	0	0
Saxony	58	1	29	1	25	2
Saxony-Anhalt	12	0	8	0	4	0
Thuringia	9	0	6	0	3	0
in total ²	231	20	124	28	48	11
previous year	232	19	119	27	59	8

1 including statewide windows; without education and training channels

2 programmes, which are licenced in more than one federal state, are counted just once

3 providers of special interest channels in local/ nationwide TV

Source: German media authorities, January 2015

→ Precarious financial situation; partly only very low advertising revenues and public subsidies by the media authorities

Radio Landscape

Statistics Radio Programmes

Programmes in the federal states	Private programmes					Public-service programmes				
	VHF state-wide	VHF local	DAB state-wide	DAB local	in total	Regional broadcasting corporations	VHF local	DAB	in total	
Baden-Wuerttemberg	1	19	12	0	23	BR (Bavaria)	5	10	10	
Bavaria	1	70	5	35	84	hr (Hesse)	6	6	6	
Berlin-Brandenburg	20	7	9	0	30	MDR (SN, ST, TH)	7	8	8	
Bremen	2	2	0	0	4	NDR (HH, MV, SH, NS)	7	9	10	
Hamburg/Schleswig-H.	8	1	0	0	8	RB (Bremen) ^{1,2}	4	5	3	
Hesse	5	3	5	0	7	RBB (BE, BB) ¹	7	7	6	
Mecklenb-W. Pomerania	2	3	0	0	3	SR (Saarland)	4	5	5	
Lower Saxony	3	5	0	0	7	SWR (BW, RP)	7	8	8	
North Rhine-Westphalia	1	45	2	0	46	WDR (NRW) ²	7	11	10	
Rhineland-Palatinate	3	15	1	0	18	community programmes	2	2	2	
Saarland	1	6	1	0	7					
Saxony	4	15	0	0	19					
Saxony-Anhalt	3	1	3	1	4					
Thuringia	4	0	2	0	5					
federal states in total	56	175	18	15	265	in total	51	16	67	
Nation-wide programmes		Satellite	VHF	DAB	in total	Satellite	VHF	DAB	in total	
		15	–	9	17	3	2	3	3	
Private in total					282	PSB in total			70	

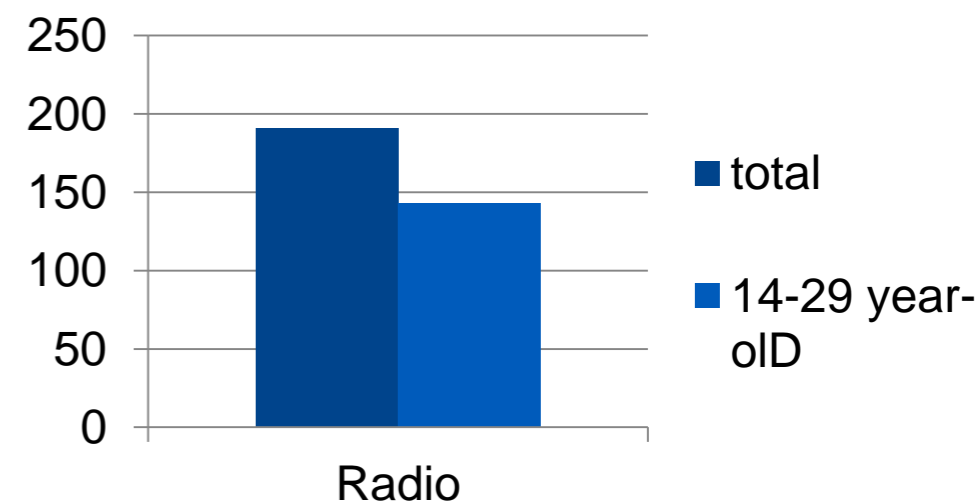
Programmes that are receivable state-wide or local via the respective way of distribution. Total sum adjusted for nation-wide programmes with additional distribution in the federal states and simulcast transmissions. Programmes that are distributed in several federal states count in total just once.

¹ incl. Funkhaus Europa (community programme from WDR, RB, RBB, SRW international)

² incl. Nordwestradio (community programme from RB, NDR)

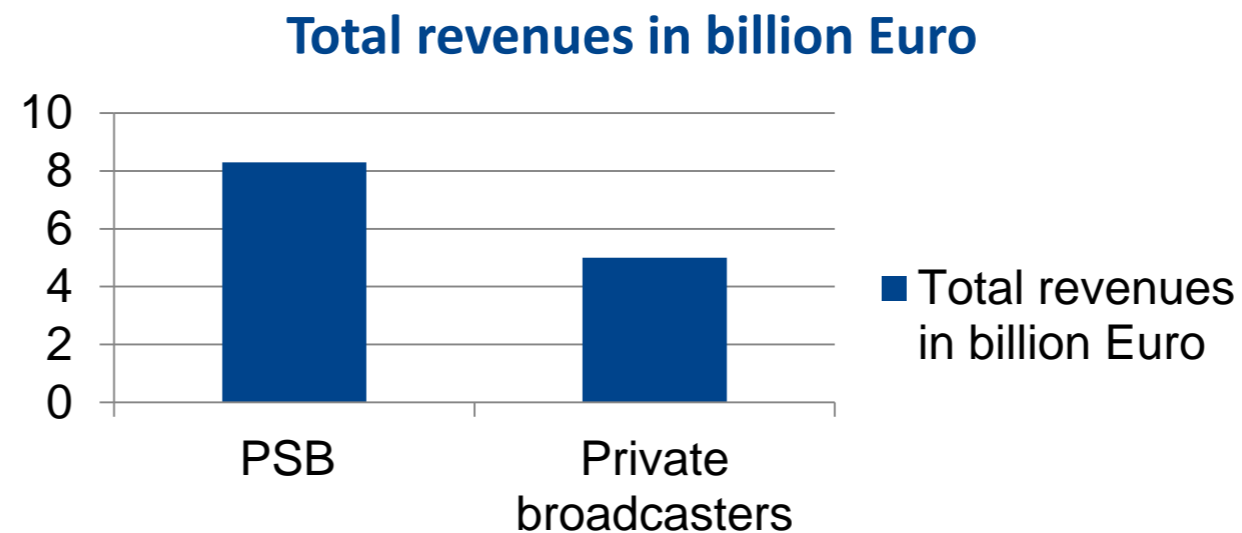
Source: German media authorities, January 2014

Radio consumption (in min/ day):



National Broadcasting System - Financing

- **Public broadcasting** (ARD and ZDF) is mainly financed by a monthly contribution per household: ca. 8.2 billion Euro; Advertising revenues of PSB: ca. 600 million Euro
- **Private broadcasting** is mainly financed by advertisement; advertising revenues ca. 5 billion Euro net

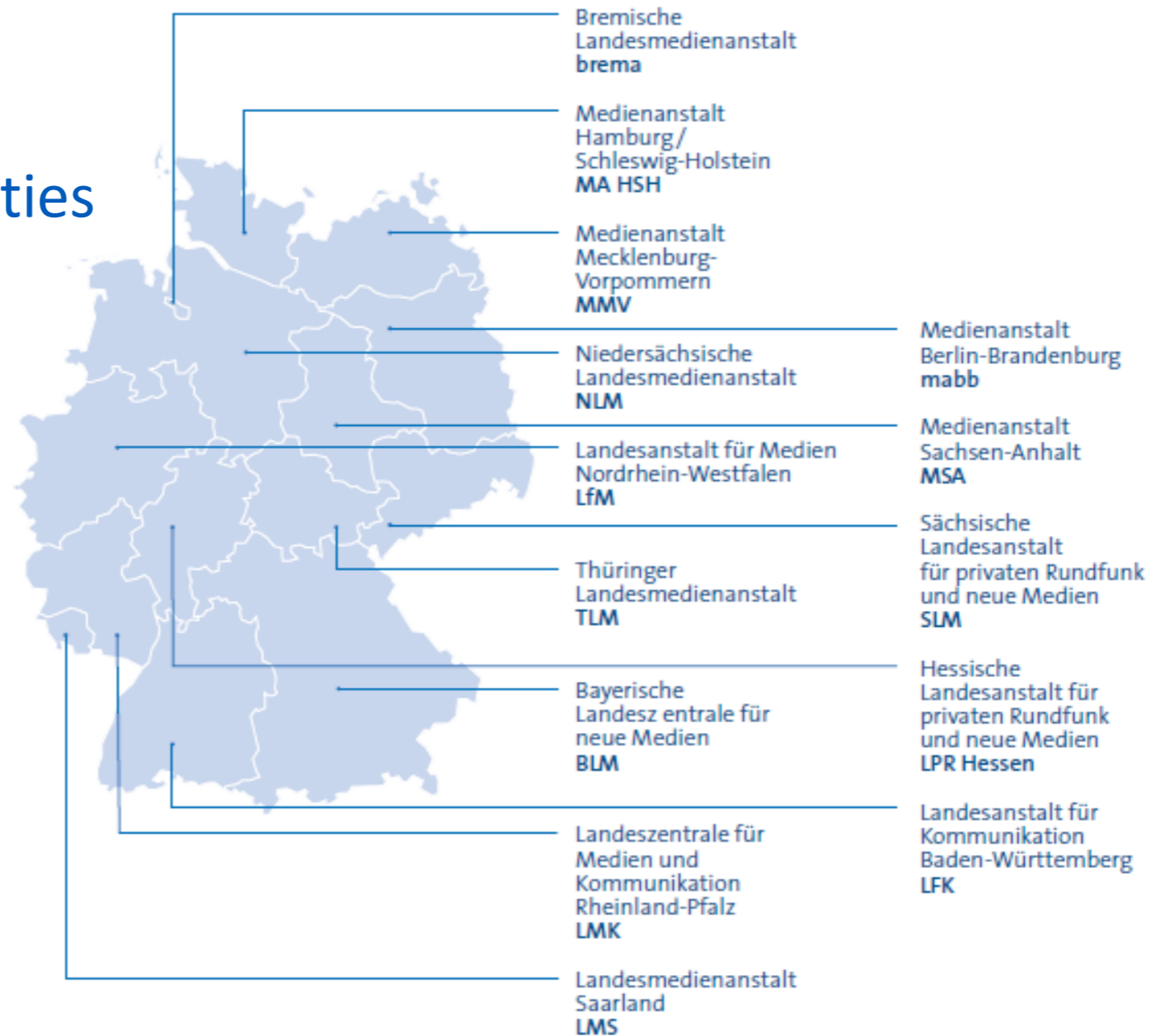


- Declining advertising revenues in radio; growing advertising revenues in TV

Regulation of private broadcasting: The Media Authorities

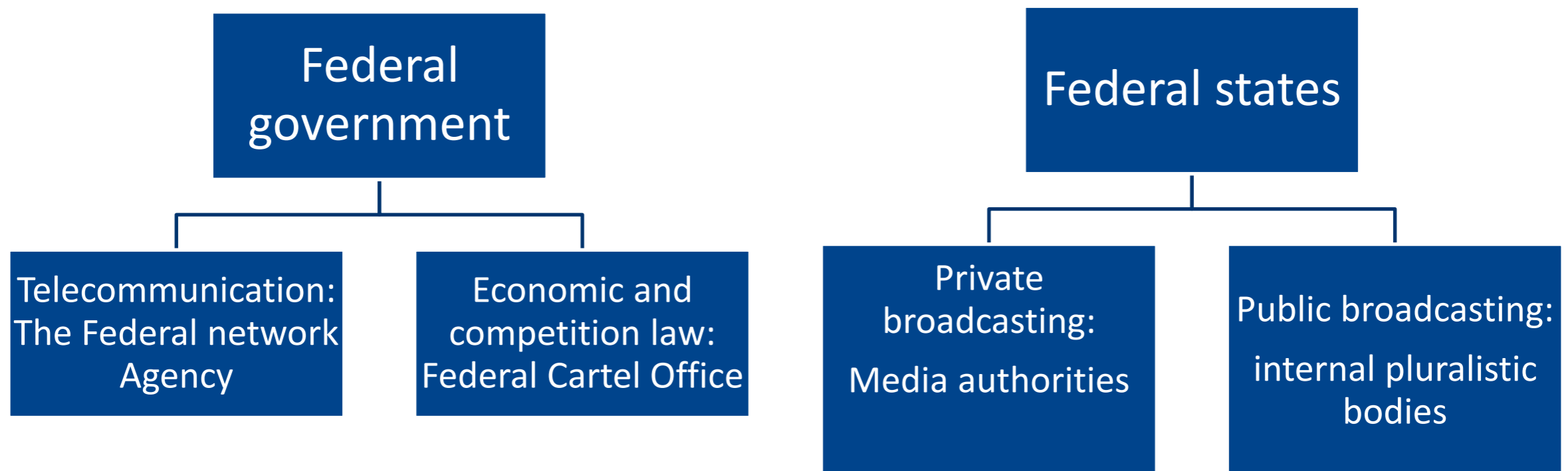
16 States

14 Media Authorities

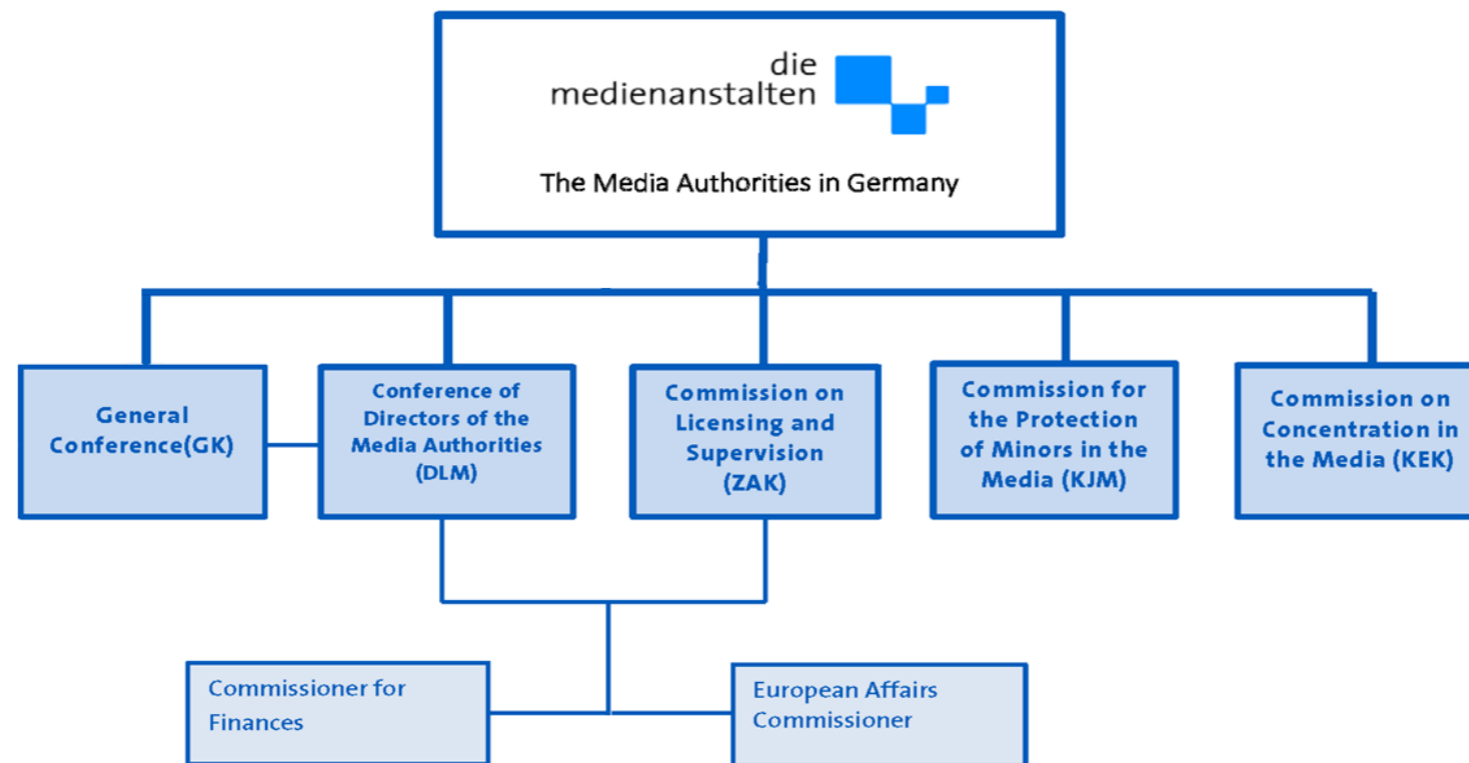


Media Regulation in Germany

Division of power between national government and federal states:



Cooperation of the Media Authorities



- Financing of all media authorities: approx. 100 million Euro
- Employees of all 14 media authorities: approx. 420 plus 25 employees in the Joint Management Office

