



WORLD PRESS TRENDS

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Germany

01. Commentary

The economic situation of newspapers in Germany 2010

Last year (2009) revenues from newspaper sales in Germany were, for the first time, greater than revenues from classified ads and other forms of advertising. The old rule of thumb that two-thirds of sales in the newspaper business stem from advertising and one third from distribution lost its validity at the time of the first business and advertising downturn in the current decade (from 2001 to 2003). The fact that this relationship is now being reversed is a clear reflection of the structural changes taking place in our industry. Like all other traditional media, newspapers are feeling the effects of the global and national economic situation, which has had repercussions in the newspaper advertising market as well as with regard to the amount of money average households are able to spend on media products.

Nonetheless, the audience penetration levels recorded for German printed newspapers have continued to be quite high. The overall audience penetration level for 2010 was 69.6 percent. This means that more than 49 million Germans over the age of 14 pick up a newspaper every day. Daily newspapers traditionally have their highest levels of audience penetration among people in the 40-69 age range, i.e. between well above 71 and just under 82 percent. Similarly, more than 82 percent of people over the age of 70 regularly read a daily newspaper and more than 63 percent of those between the ages of 30 and 39. But younger age groups are also newspaper readers; more than 42 percent of the 14-to-19-year-olds and well above 53 percent of the 20-to-29-year olds show an interest in reading printed daily newspapers.

All in all, seven out of 10 Germans over the age of 14 regularly read a daily newspaper. Slightly more local and regional newspapers delivered to subscribers are read by women (58 percent) than by men (55.8 percent). More newspapers purchased at newsstands and national newspapers delivered to subscribers are read by men (26.5 percent and 6.8 percent respectively) than by women (15.8 percent and 4.3 percent respectively).

Renewed decline in overall sales

2009 will be remembered as one of the most difficult years on record for the newspaper industry. Newspapers showed a significant decline in overall sales from advertising, supplements, and distribution, falling from the previous year's figure of 9.09 billion euros to 8.46 billion, a decrease of 7.04 percent. Out of the total sales figure, daily newspapers accounted for 7.96 billion euros, a decrease of 6.84 percent.

The economic situation in 2009 was extremely unfavorable; gross domestic product (GDP) fell by price-adjusted 4.9 percent, in stark contrast to the increase of 1.3 percent seen in 2008. The inflation rate, on the other hand, was extraordinarily low at 0.4 percent (compared to 2.6 percent in 2008). The percentage decline in business for the newspaper industry exceeded the percentage decline in GDP. Advertising revenues showed a loss of 15.9 percent, considerably greater than the loss seen in 2008 (4.1 percent); distribution sales, on the other hand, showed a gain of 2.3 percent.

Trend in advertising sales

With advertising sales of 3.69 billion euros in 2009 (despite the fact that this constitutes a decline of 15.5 percent) daily newspapers continue to be the most important advertising medium in Germany. Advertising sales by weekly and Sunday newspapers fell from 266 to 208 million euros (-21.6 percent). Newspaper supplements are no longer listed separately. Total advertising sales for all newspaper categories amounted to 3.9 billion euros (-15.9 percent). Advertising sector losses for Germany as a whole were considerable. The average decline in sales for all advertising media in 2009 was 9.8 percent. The share the newspaper industry had in overall advertising sales declined slightly to just under 22 percent. In the year 2000, it had been 29 percent.

Regional newspapers in western and eastern Germany showed total advertising sales of 3.04 billion euros for 2009. From January to December 2009 advertising volume declined by 12.1 percent: Newspapers in western Germany showed a loss of 11.9 percent in advertising volume, while their eastern German counterparts fared even worse with a decline of 14.3 percent. Net advertising volume trends varied considerably in the different advertising categories. While job advertisements showed extreme losses (39.3 percent), the losses for real estate advertisements (18.2 percent), car advertisements (15 percent), and other advertisements (18.4 percent) were somewhat below average. The losses suffered in business advertisements (5 percent), event advertisements (4.7 percent), and family advertisements (0.9 percent) were much smaller. The only gain registered was in travel advertisements (0.4 percent).

In the first half of 2010, the volume of paid advertisements in local and regional subscription newspapers showed a renewed loss of 7.3 percent compared with the same period the previous year. The only gain seen was in job advertisements (1.8 percent). A negative trend was shown between January and June 2010 in business advertisements (-6.9 percent), real estate advertisements (-18.9 percent), car advertisements (-11 percent), travel advertisements (-12.9 percent), event advertisements (-2.8 percent), family advertisements (-3 percent), and other advertisement categories (-10.1 percent).

The insert business in 2009 was disappointing, showing a loss of 3.6 percent; the downward trend in this market segment continued in the first half of 2010, showing a further decline of 3.9 percent. This was primarily a result of losses in western Germany. In the eastern parts of the country, by contrast, the insert business prospered, showing gains of 2.6 percent in 2009.

Average daily circulation at 24.8 million copies

Newspapers in Germany have a total circulation of 24.8 million sold copies per publication day (German Audit Bureau of Circulations, 2nd quarter 2010). This means there was an average decline in circulation of 527,661 copies (-2.1 percent) compared to the same quarter the previous year. This total circulation figure does not take into account the sales of 95,263 e-newspaper editions (+20.7 percent).

Specific losses amounted to -2.2 percent for local/regional newspapers (western Germany -1.9 percent / eastern Germany -3.3 percent), -2.8 percent for national newspapers, -3.6 percent for newspapers sold at newsstands, and -1.4 percent for Sunday newspapers. Only the weekly newspapers registered a gain (1.7 percent).

The sold circulation of all categories of newspapers breaks down to 19.43 million copies for daily newspapers, 3.38 million copies for Sunday newspapers, and 1.94 million copies for weekly newspapers. Of the total figure for daily newspapers, 13.74 million copies are accounted for by local and regional subscription newspapers, just under 1.6 million copies by national newspapers, and more than 1.4 million copies by newspapers sold at newsstands.

Source:BDZV by Anja Pasquay

02. Population

Population by age and sex

Numbers in (000)

	ALL INDIVIDUALS	ALL INDIVIDUALS %	MALE	MALE %	FEMALE	FEMALE %
0-14	11,011	13	5,639	14	5,372	13
15-24	9,135	11	4,654	12	4,481	11
25-34	9,784	12	4,927	12	4,857	12
35-44	11,876	15	6,052	15	5,824	14
45-54	13,261	16	6,740	17	6,521	16
55-64	9,982	12	4,930	12	5,052	12
65 +	16,653	20	7,105	18	9,548	23
Total	81,702		40,047		41,656	

Source:

World Bank

03. Number of titles and circulation

3.a Number of titles

	2006	2007	2008	2009	2010	2010/2006	2010/2009
All newspapers (A+B+C)	1,993	2,006	2,040	2,062	2,032	2.0 %	-1.5 %
A. Total dailies	370	359	358	357	353	-4.6 %	-1.1 %
A.1. Total paid-for dailies	370	359	358	357	353	-4.6 %	-1.1 %
A.1.1 National paid-for dailies	10	10	10	10	10	0.0 %	0.0 %
A.1.2 Regional and local paid-for dailies	360	349	348	347	343	-4.7 %	-1.2 %
A.1 Total paid-for dailies	370	359	358	357	353	-4.6 %	-1.1 %
A.1.3 Morning paid-for dailies	370	359	358	357	353	-4.6 %	-1.1 %
A.1.4 Evening and afternoon paid-for dailies							
A.2 Total free dailies							
B. Total non-dailies	1,378	1,402	1,421	1,441	1,410	2.3 %	-2.2 %
B.1 Total paid-for non-dailies	28	28	28	27	26	-7.1 %	-3.7 %
B.2 Total free non-dailies	1,350	1,374	1,393	1,414	1,384	2.5 %	-2.1 %
C. Total Sundays	245	245	261	264	269	9.8 %	1.9 %
C.1 Total paid-for Sundays	6	7	6	6	6	0.0 %	0.0 %
C.2 Total free Sundays	239	238	255	258	263	10.0 %	1.9 %

Source:

2006: ZMG-Auflagenstatistik III/2006, BVDA

2007: ZMC-circulation III/2007, BVDA

2008: ZMC-circulation III/2008, BVDA

2009: ZMC-circulation III/2009, BVDA

2010: ZMG-circulation III/2010, Federal Association of German Advertising papers www.zmg.de, www.bdzv.de

Comment:

Ten other newspaper that were published in Germany, previously not recognized in the World Press Trends analysis because they were not included in the definition of data collection. The daily circulation of these newspapers is 4.060.703 copies.

"B.2 Total free non-dailies" and "C.2 Total free Sundays" In Germany, free non-dailies and free Sundays (Anzeigenblätter = advertising journals) do not comply with the definition of newspaper as the share of their editorial content is too small in proportion with advertising

3.b Total average circulation per issue

Circulation in thousands (000)

	2006	2007	2008	2009	2010	2010/2006	2010/2009
A. Total dailies	21,091	20,590	20,079	19,746	19,090	-9.5 %	-3.3 %
A.1 Total paid-for dailies	21,091	20,590	20,079	19,746	19,090	-9.5 %	-3.3 %
A.1.1 National paid-for dailies	1,632	1,624	1,624	1,599	1,551	-5.0 %	-3.0 %
A.1.2 Regional and local paid-for dailies	19,459	18,966	18,455	18,147	17,539	-9.9 %	-3.4 %
A.1 Total paid-for dailies	21,091	20,590	20,079	19,746	19,090	-9.5 %	-3.3 %
A.1.3 Morning paid-for dailies	21,091	20,590	20,079	19,746	19,090	-9.5 %	-3.3 %
A.1.4 Evening and afternoon paid-for dailies							
A.2 Total free dailies							
B. Total non-dailies	88,455	90,583	91,982	93,812	93,095	5.2 %	-0.8 %
B.1 Total paid-for non-dailies	2,055	1,983	1,982	1,912	1,895	-7.8 %	-0.9 %
B.2 Total free non-dailies	86,400	88,600	90,000	91,900	91,200	5.6 %	-0.8 %
C. Total Sundays	23,330	23,177	23,521	23,577	24,531	5.1 %	4.0 %
C.1 Total paid-for Sundays	3,830	3,677	3,521	3,477	3,431	-10.4 %	-1.3 %
C.2 Total free Sundays	19,500	19,500	20,000	20,100	21,100	8.2 %	5.0 %

Source:

2006: ZMG-Auflagenstatistik III/2006, BVDA

2007: ZMC-circulation III/2007, BVDA

2008: ZMC-circulation III/2008, BVDA

2009: ZMC-circulation III/2009, BVDA

2010: ZMG-circulation III/2010, Federal Association of German Advertising papers www.zmg.de, www.bdzv.de

Comment:

"B.2 Total free non-dailies" and "C.2 Total free Sundays" In Germany, free non-dailies and free Sundays (Anzeigenblätter = advertising journals) do not comply with the definition of newspaper as the share of their editorial content is too small in proportion with advertising.

04. Sales

4.b Sales revenues

Total annual revenue (EUR - mln)

	2006	2007	2008	2009	2010	2010/2006	2010/2009
All paid-for newspapers (A+B+C)	4,261.2	4,260.7	4,372.5	8,376.0	8,432.4	97.9 %	0.7 %
A Total paid-for dailies	4,060.5	4,062.4	4,170.2	7,959.6	8,010.8	97.3 %	0.6 %
A.1 National paid-for dailies							
A.2 Regional and local paid-for dailies							
B Total paid-for non-dailies	200.7	198.3	202.3	416.4	421.6	110.1 %	1.2 %
C Total paid-for Sundays							

Source:

BDZV

4.c Type of newspaper sales (%)

	2006	2007	2008	2009	2010
Single copy sales	35.6	35.1	34.5	34.6	33.7
Subscriptions (home and postal deliveries)	64.4	64.9	65.5	65.4	66.3
Home deliveries					
Postal deliveries					
Office deliveries					
Bulk (sponsored) deliveries					
Free distribution					
Other print					
Total	100.0	100.0	100.0	100.0	100.0

Source:

www.ivw.de

4.d Cover prices

Average cover price in EUR

	2006	2007	2008	2009	2010	CURRENT YEAR HIGH	CURRENT YEAR LOW
Single copy				1.09	1.15	2.00	1.15
Subscription				22.31	23.54	43.90	23.54

Source:

www.bdzv.de

Comment:

"Subscription" monthly price.

05. Newspaper reach, readership and media consumption

5.a Newspaper reach in %

In % of population group

	2006	2007	2008	2009	2010
All adults	73.7	73.2	72.4	71.4	69.6
Men	75.7	75.1	74.4	73.5	71.9
Women	71.9	71.4	70.5	69.4	67.4
Main household shopper	71.4	71.4	71.4	71.4	69.5

Source:

2009: BDZV; ZMG; Arbeitsgemeinschaft Media Analyse

2010: Media-Analyse (MA)

5.b Age structure of readership

	CURRENT YEAR % OF READERSHIP	CURRENT YEAR % DAILY REACH WITHIN AGE GROUP
14-19	4.6	42.3
20-29	10.7	53.3
30-39	13.2	63.2
40-49	19.7	71.2
50-59	17.8	78.4
60-69	15.8	81.8
70+	18.3	82.0

Source:

Media-Analyse (MA)

5.c Media consumption

Minutes per day

	2006	2007	2008	2009	2010
Newspapers	28	28	28	28	23
Magazines	10	12	12	12	6
Radio	221	221	221	182	187
Television	220	220	220	228	220
Internet	44	54	58	70	83

Source:

2006: Media-Perspektiven 2006

2007: Media-Perspektiven 2007; ARD-ZDF-Onlinestudie 2007

2008: Media-Perspektiven 2008; ARD-ZDF-Onlinestudie 2008

2009: Media-Perspektiven 2009; ARD-ZDF-Onlinestudie 2009

2010: Media-Perspektiven 2010

5.d Number of readers**Readers in thousands (000)**

	2006	2007	2008	2009	2010
A Total dailies			64,870	64,820	64,720
A.1 Total paid-for dailies			64,870	64,820	64,720
A.2 Total free dailies					

Source:

Media-Analyse (MA)

06. Online / Digital publishing

6.a Online editions

	2006	2007	2008	2009	2010	2010/2006	2010/2009
Number of newspaper online editions	386	267	267	267	661	71.2 %	147.6 %

Source:

2006: BDZV

2007: BDZV – World Wide Web

2008 – 2009: BDZV

2010: BDZV (www.bdzv.de/zeitungswebsites.html)

6.b Online readership

Unique visitors in (000)

	2006	2007	2008	2009	2010	2010/2006	2010/2009
Total newspaper online unique monthly visitors	12,320.0	13,760.0	15,460.0	17,340.0	25,650.0*1	108.2 %	47.9 %
Total newspaper online unique daily visitors							

*1

Change in methodology 2010 – numbers not anymore comparable to previous years

Source:

AGOF internet facts 2010

6.c Top daily newspaper websites

(see next page)

	NEWSPAPER	PUBLISHING COMPANY / TITLE	AVERAGE CIRCULATION	UNIQUE MONTHLY VISITORS	MONTHLY PAGE VIEWS	UNIQUE DAILY VISITORS	DAILY PAGE VIEWS
1	Bild.de	Axel Springer		12,690	2,009,233,540		
2	Welt.de	Axel Springer		7,170	218,333,862		
3	sueddeutsche.de	Süddeutsche Zeitung		5,640	180,000,793		
4	ZEIT Online	Zeitverlag Gerd Cucerius		4,030	82,982,142		
5	RP Online	Rheinische-Bergische Verlagsgesellschaft mbH		3,760	112,449,071		
6	FAZ.net	Frankfurter Allgemeine Zeitung		3,610	114,466,796		
7	Abendblatt.de	Axel Springer		3,200	30,223,657		
8	Der Westen	WAZ Mediengruppe		2,390	61,769,020		
9	Berliner Morgenpost	Axel Springer		1,810	24,933,785		
10	Handelsblatt Online	Verlagsgruppe Handelsblatt		1,720	34,210,467		
11	tagesspiegel.de	Der Tagesspiegel		1,570	15,630,615		
12	Frankfurter Rundschau	M. DuMont Schauberg		1,440	14,707,365		
13	taz.de	TAZ Verlags- und Vertriebs GmbH		1,350	12,135,425		
14	BZ-Berlin	Axel Springer		1,300	17,549,425		
15	FTD.de	Gruner + Jahr		1,240	37,404,598		
16	BerlineOnline	Berliner Verlag GmbH		1,220	15,942,411		
17	Express Online	M. DuMont Schauberg		1,120	58,190,517		
18	Merkur Online	Münchener Zeitungsverlag		1,090	24,640,019		
19	Kölner Stadt-Anzeiger	M. DuMont Schauberg		910	23,050,280		
20	Augsburger Allgemeine	Mediengruppe Pressedruck		910	17,097,985		
21	Stuttgarter Zeitung & Stuttgarter Nachrichten	Stuttgarter Zeitung Stuttgarter Nachrichten GmbH		890	23,555,865		
22	Badische Zeitung	Badischer Verlag		880	17,597,876		
23	TZ Online	Münchener Zeitungsverlag		790	30,311,379		
24	mopo.de	Axel Springer		700	33,449,124		

	NEWSPAPER	PUBLISHING COMPANY / TITLE	AVERAGE CIRCULATION	UNIQUE MONTHLY VISITORS	MONTHLY PAGE VIEWS	UNIQUE DAILY VISITORS	DAILY PAGE VIEWS
25	Rhein-Zeitung	Mittelrhein-Verlag GmbH		660	6,783,905		
26	nordbayern.de	Nürnberger Presse		630	12,785,710		
27	Abendzeitung	Münchener Zeitungsverlag		620	12,304,858		
28	Ruhr Nachrichten	Verlag Lensing-Wolff		620			
29	SuedKurier.de	Südkurier Medienhaus		600	20,435,562		
30	HNA online	Verlag Dierichs		540	16,744,757		
31	NWZ-Online	Nordwest-Zeitung Verlagsgesellschaft		510	14,399,431		
32	Maerkische Allgemeine.de	Märkische Verlags- & Druck-Gesellschaft		480	2,690,328		
33	Neue Osnabrücker Zeitung	Neue Osnabrücker Zeitung GmbH		470	22,524,947		
34	sz-Online	DD+V Mediengruppe		470	13,118,544		
35	Mitteldeutsche Zeitung			460	6,134,749		

Source:

AGOF internet facts 2011-02

IVW 2011-4 Page Impressions

6.d Internet subscribers and users**Number of Internet subscribers in (000) and Number of Internet users in (000)**

	2006	2007	2008	2009	2010
Internet subscribers					
Internet users	59,442.8	61,831.4	64,045.9	64,702.8	66,995.9

Source:

ITU

6.e Broadband Internet**Number of broadband subscribers in (000)**

	2006	2007	2008	2009	2010
Broadband subscribers	14,977.2	19,687.0	22,643.6	24,891.8	26,089.8

Source:

ITU

07. Advertising

7.aa Gross domestic product

Gross domestic product in current EUR (bln)

	2006	2007	2008	2009	2010
GDP	2,313.9	2,428.5	2,473.8	2,374.5	2,476.8

Source:

The World Bank

Comment:

GDP at purchaser's prices is the sum of gross value added by all resident producers in the economy plus any product taxes and minus any subsidies not included in the value of the products. It is calculated without making deductions for depreciation of fabricated assets or for depletion and degradation of natural resources. Data are in current local currency.

7.ab Gross domestic product per capita

Gross domestic product per capita in current USD (000)

	2006	2007	2008	2009	2010
GDP per capita	35.2	40.4	44.1	40.3	40.2

Source:

The World Bank

Comment:

GDP per capita is gross domestic product divided by midyear population. GDP is the sum of gross value added by all resident producers in the economy plus any product taxes and minus any subsidies not included in the value of the products. It is calculated without making deductions for depreciation of fabricated assets or for depletion and degradation of natural resources. Data are in current U.S. dollars.

7.ac Ad spend as a % of GDP

	2006	2007	2008	2009	2010
% of GDP	0.77	0.77	0.76	0.72	0.72

Source:

ZenithOptimedia

7.ba Advertising expenditure per medium

Advertising expenditure per medium in EUR (mln)

	2006	2007	2008	2009	2010
Press (Newspapers + Magazines)	10,836.0	10,951.0	10,683.0	9,396.0	9,408.0
- Newspapers	6,826.0	6,898.0	6,734.0	5,951.0	5,943.0
- Magazines	4,010.0	4,053.0	3,949.0	3,445.0	3,465.0
Television	4,114.0	4,156.0	4,036.0	3,640.0	3,954.0
Radio	680.0	743.0	720.0	678.0	692.0
Cinema	117.0	106.0	77.0	72.0	75.0
Outdoor	787.0	820.0	805.0	738.0	766.0
Internet	1,500.0	2,094.0	2,498.0	2,696.0	3,067.0
Below the line marketing					
Others					
Total	18,034.0	18,870.0	18,819.0	17,220.0	17,962.0

Source:

ZenithOptimedia

Comment:

1. Excludes agency commission of 15%
2. Excludes production costs
3. Includes classified advertising
4. After discounts
5. Magazines include directories and trade titles
6. Newspapers includes dailies, weeklies, Sundays and supps.
7. Internet includes display, paid search and affiliate deals

7.c Advertising revenues**Advertising revenues in EUR (mln)**

	2006	2007	2008	2009	2010	2010/2006	2010/2009
A. Total dailies	4,532.9	4,567.4	4,373.4	3,694.3	3,637.8	-19.7 %	-1.5 %
A.1. Total paid-for dailies	4,532.9	4,567.4	4,373.4	3,694.3	3,637.8	-19.7 %	-1.5 %
A.1.1 National paid-for dailies							
A.1.2 Regional and local paid-for dailies							
A.1 Total paid-for dailies				3,694.3	3,637.8		-1.5 %
A.1.3 Morning paid-for dailies							
A.1.4 Evening and afternoon paid-for dailies							
A.2 Total free dailies							
B. Total non-dailies	260.2	269.7	265.7	208.3	217.8	-16.3 %	4.6 %
B.1 Total paid-for non-dailies	260.2	269.7	265.7	208.3	217.8	-16.3 %	4.6 %
B.2 Total free non-dailies							
C. Total Sundays							
C.1 Total paid-for Sundays							
C.2 Total free Sundays							

Source:

www.bdzv.de

7.e Contribution of display, classified, insert and online advertising to total advertising revenue in (%)

Sorry, no data available.

7.f Top newspaper advertising categories**Expenditure in EUR mln**

	ADVERTISING SECTOR	EXPENDITURE
1	Retail organisations	1,520.491
2	Newspapers	1,216.460
3	Automobiles	396.210
4	Other media/publishers	203.254
5	Consumer magazines	131.290
6	Clothing	110.493
7	Shipping lines & tourism	85.339
8	Online services	82.116
9	Corporations	74.380
10	Financial institutions & images	67.802

Source:

ZenithOptimedia

7.g Top newspaper advertisers**Expenditure in EUR (000)**

	ADVERTISER	EXPENDITURE
1	Aldi	385,000
2	Madie-Saturn-Holding	253,000
3	Lidl	252,000
4	Edeka	193,000
5	Penny Markt	107,000
6	C+A	74,000
7	Rewe	65,000
8	Netto Marken-Discount	64,000
9	Dt. Sparkassen- und Giroverband	56,000
10	Daimler	51,000

Source:

ZenithOptimedia

08. Publishers and newspapers

8.a Top publishing companies

Total revenue in EUR (000), Total circulation in (000)

	PUBLISHING COMPANY	ULTIMATE PARENT COMPANY	TOTAL CIRCULATION	TOTAL REVENUE
1	Axel Springer AG, Berlin	Axel Springer AG	3,833	
2	SWMH Südwestdeutsche Medien Holding, Stuttgart		1,687	
3	Verlagsgruppe WAZ, Essen	Verlagsgruppe WAZ	1,125	
4	Verlagsgruppe M.DuMont Schauberg, Köln	Verlagsgruppe M.DuMont Schauberg	1,082	
5	Verlagsgruppe Münchener Zeitungsverlag/Zeitungsverlag tz/ Westfälischer Anzeiger/Ippen		811	
6	Verlagsgruppe Madsack, Hannover	Verlagsgruppe Madsack	790	
7	Verlagsgruppe Frankfurter Allgemeine Zeitung	Verlagsgruppe Frankfurter Allgemeine Zeitung	613	
8	DDVG, Deutsche Druck- und Verlagsgesellschaft mbH, Hamburg		556	
9	Georg von Holtzbrinck GmbH & Co. KG, Stuttgart	Georg von Holtzbrinck GmbH & Co. KG	457	
10	Rheinische Post , Düsseldorf	Rheinisch-Bergische Verlagsgesellschaft mbH	388	

Source:

Media-Perspektiven 2010

8.ba Top paid-for dailies

Cover prices and ad rates in EUR; Circulation (Average daily in 000) and Readership (Average issue in 000)

	TITLE	FOUNDED (YEAR)	LANGUAGE	PUBLISHING COMPANY	ULTIMATE PARENT COMPANY	CIRCULATION	READER
1	BILD	1,952	German	Axel Springer AG		2,900	1
2	WAZ-Mediengruppe	1,948	German	Verlagsgruppe WAZ		807	
3	Zeitungsgruppe Köln	1,802	German	M. DuMont Schauberg		515	
4	Süddeutsche Zeitung	1,945	German	Süddeutscher Verlag GmbH		428	
5	Frankfurter Allgemeine Zeitung	1,949	German	Verlag FAZ GmbH		364	
6	Rheinische Post	1,946	German	Rheinisch-Bergische Verlagsgesellschaft mbH		354	
7	Augsburger Allgemeine	1,945	German	Presse- Druck- und Verlags GmbH		330	
8	Zeitungsgruppe Thüringen	1,945	German	Zeitungsgruppe Thüringen Verwaltungsgesellschaft mbH		306	
9	fp Freie Presse	1,946	German	Chemnitzer Verlag und Druck GmbH		283	
10	Nürnberger Nachrichten	1,945	German	Mitteldeutsches Druck- und Verlagshaus GmbH & Co. KG		280	
11	Münchener Merkur		German	Münchener Zeitungsverlag GmbH & Co.KG		266	
12	Sächsische Zeitung		German	Dresdner Druck- und Verlagshaus GmbH & Co. KG		262	
13	Die Welt Gesamt (DIE WELT + WELT Kompakt)		German	Axel-Springer AG		250	
14	ZG Neue Westfälische		German	Zeitungsverlag Neue Westfälische GmbH & Co. KG		244	
15	Die Rheinpfalz inkl. Pirmasenser Zeitung		German	Rheinpfalz Verlag und Druckerei GmbH & Co. KG		242	
16	Hessische/Niedersächsische Allgemeine		German	Verlag Dierichs GmbH & Co. KG		223	
17	Hamburger Abendblatt		German	Axel-Springer AG		219	

	TITLE	FOUNDED (YEAR)	LANGUAGE	PUBLISHING COMPANY	ULTIMATE PARENT COMPANY	CIRCULATION	READER
18	Leipziger Volkszeitung		German	Leipziger Verlags- und Druckereiges. mbH & Co. KG		217	
19	Mitteldeutsche Zeitung		German	Leipziger Verlags- und Druckereiges. mbH & Co.KG		213	
20	Stuttgarter Nachrichten/Stuttgarter Zeitung (Gesamt)		German	Stuttgarter Zeitung Verlagsgesellschaft mbh & Co		207	

Source:

BDZV; IVW; ZMG

09. Employment and salaries

9.a Employment

	2006	2007	2008	2009	2010	2010/2006	2010/2009
Total number of journalists			15,677	15,556	13,573		-12.7 %
Number of full-time journalists							
Number of part-time journalists							
Total number of other employees							
Total number of employees (journalists + others)			15,677	15,556	13,573		-12.7 %

Source:

www.abzv.de

11. Research

11. Research

Circulation is audited by:	<p>Informationsgemeinschaft zur Feststellung der Verbreitung von Werbeträgern e.V. (IVW) Am Weidendamm 1 A 10117 Berlin Germany</p> <p>www.ivw.de</p>
Readership is measured by:	<p>Arbeitsgemeinschaft Media Analyse e.V. (AG.MA) Media-MicroCensus GmbH Am Weingarten 25 60487 Frankfurt am Main Germany</p> <p>www.agma-mmc.de</p>
Methodology:	
Print advertising revenue is measured by:	<p>Zentralverband der deutschen Werbewirtschaft ZAW Am Weidendamm 1 A 10117 Berlin Germany</p> <p>www.zaw.de</p> <p>Bundesverband Deutscher Zeitungsverleger e.V. www.bdzv.de</p>
Methodology:	
Digital advertising revenue is measured by	
Methodology:	
Digital audience is measured by:	
Methodology:	
Digital advertising revenue is measured by:	
Methodology:	

Source:

2009: BDZV

12. Taxes

12. Taxes

	2009	2010
Standard VAT	19	19
Single copy sales	7	7
Subscription sales	7	7
Advertising	19	19
Newsprint	19	19
Composition	19	19
Plant		
Other taxes		

13. Subsidies

13.b Direct subsidies

(EUR, mln)

	2006	2007	2008	2009	2010
National currency					0.0

15. Ownership

15.b Cross-media ownership restrictions

	REGIONAL TV	NATIONAL TV	REGIONAL NEWSPAPERS	NATIONAL NEWSPAPERS	RADIO
Regional TV Licensees	Max. 30% market share in TV (either German or foreign)	Max. 30% market share in TV (either German or foreign)	Allowed	Allowed	Allowed
National TV Licensees	Max. 30% market share in TV (either German or foreign)	Max. 30% market share in TV (either German or foreign)	Allowed	Allowed	Allowed
Regional Newspaper Owners	Allowed	Allowed	Allowed	Allowed	Up to 25% or 35% ordinary capital
National Newspaper Owners	Allowed	Allowed	Allowed	Allowed	Up to 25% or 35% ordinary capital
Satellite TV Broadcasters	Max. 30% market share in TV (either German or foreign)	Max. 30% market share in TV (either German or foreign)	Allowed	Allowed	Allowed
Local Radio Licensees	Allowed	Allowed	Up to 25% or 35% ordinary capital	Up to 25% or 35% ordinary capital	Allowed
National Radio Licensees	Allowed	Allowed	Up to 25% or 35% ordinary capital	Up to 25% or 35% ordinary capital	Allowed
Foreign Investors	No difference between German or foreign investors	No difference between German or foreign investors	No difference between German or foreign investors	No difference between German or foreign investors	No difference between German or foreign investors

Source:

BDZV

16. Contact

BDZV - Bundesverband Deutscher

Zeitungsverleger e.V.

Federation of German Newspaper Publishers