

Ben Bachmair

Report on the German Newspaper Market

The following text summarizes and repeats the essentials of these following reports:

Ridder, Christa-Maria, Engel, Bernhard: Ergebnisse der 8.Welle der ARD/ZDF- Langzeitstudie zur Mediennutzung und -bewertung. Massenkommunikation 2000: Images und Funktionen der Massenmedien im Vergleich. Media Perspektiven 3/2001, p. 104 - 125

Schütz, Walter J.: Trotz Bewegung im Markt keine wesentliche Erweiterung des publizistischen Angebotes. Deutsche Tagespresse 2001. In: Media Perspektiven 12/2001, p. 602 - 632

The report on the Rhacna-Data (*Bild* and *Frankfurter Allgemeine Zeitung*) from Germany summarized and written by Judith Seipold

1. General Overview on the German Publishing Companies of Newspapers (Schütz 2001)

From 1999 to 2001, there were 136 “basic newspaper items” (“publizistische Einheiten”), which appeared in 1,584 “separate daily issues” (“Ausgaben”). Through a co-operation between 356 publishers (“Verlage als Herausgeber”), a differentiation of these 136 basic newspaper items into 1,584 separate daily issues was made. Each of these 1,584 separate daily issues, originating from 136 basic newspaper items, can share a variety of traits, ie. newspaper title, coverage, “politics” section, etc.

Ⓜ Rangfolge der Verlage als Herausgeber deutscher Tageszeitungen nach Auflagenhöhe 2001¹⁾

Rang- platz	Verlage als Herausgeber	Standort	Auflage in Tsd	Rang- platz	Verlage als Herausgeber	Standort	Auflage in Tsd
1	Bild ³⁾	Hamburg	4 396,3	36	Hannoversche Allgemeine Zeitung	Hannover	161,4
2	Westdeutsche Allgemeine	Essen	538,3	37	Allgemeine Zeitung	Mainz	161,4
3	Süddeutsche Zeitung	München	436,1	38	Neue Westfälische	Bielefeld	160,9
4	Frankfurter Allgemeine ⁴⁾	Frankfurt/Main	408,6	39	Passauer Neue Presse	Passau	160,8
5	Freie Presse ²⁾	Chemnitz	386,0	40	Badische Zeitung	Freiburg	159,1
6	Rheinische Post	Düsseldorf	341,8	41	Braunschweiger Zeitung	Braunschweig	157,9
7	Mitteldeutsche Zeitung ³⁾	Halle	332,3	42	Handelsblatt ⁴⁾	Düsseldorf	155,7
8	Hamburger Abendblatt	Hamburg	288,2	43	Badische Neueste Nachrichten	Karlsruhe	155,4
9	Kölnischer Stadt-Anzeiger	Köln	274,6	44	Westfalenpost	Hagen	152,4
10	Magdeburger Volksstimme ²⁾	Magdeburg	263,7	45	Osthüringer Zeitung ²⁾	Gera	151,0
11	B.Z. ³⁾	Berlin	259,0	46	Münchener Merkur		
12	Die Welt ⁴⁾	Berlin	255,2		[Zeitungsverlag Oberbayern]	Wolfratshausen	150,3
13	Die Rheinpfalz	Ludwigshafen	247,1	47	tz ³⁾	München	149,5
14	Thüringer Allgemeine ²⁾	Erfurt	243,6	48	Lausitzer Rundschau ²⁾	Cottbus	149,2
15	Sächsische Zeitung ²⁾	Dresden	240,6	49	Stuttgarter Zeitung	Stuttgart	147,5
16	Ruhr-Nachrichten	Dortmund	240,3	50	Main Post	Würzburg	140,2
17	Express ³⁾	Köln	234,5	51	Südkurier	Konstanz	139,3
18	Leipziger Volkszeitung ²⁾	Leipzig	223,8	52	Der Tagesspiegel	Berlin	137,9
19	Rhein-Zeitung	Koblenz	213,6	53	Kölnische Rundschau	Köln	131,8
20	Augsburger Allgemeine	Augsburg	210,1	54	Nürnberger Nachrichten	Nürnberg	130,8
21	Märkische Allgemeine ²⁾	Potsdam	197,8	55	Mittelbayerische	Regensburg	128,6
22	Berliner Zeitung	Berlin	197,3	56	Nordwest Zeitung	Oldenburg	128,3
23	Frankfurter Rundschau	Frankfurt/Main	192,2	57	Westfälische Nachrichten	Münster	125,1
24	Ostsee-Zeitung ²⁾	Berlin	191,0	58	Märkische Oderzeitung ²⁾	Frankfurt/Oder	123,0
25	Flensburger Tageblatt/Schleswig- Holsteinischer Zeitungsverlag	Flensburg	190,8	59	Nordkurier ³⁾	Neubrandenburg	120,1
26	Westfälische Rundschau	Dortmund	187,6	60	Schweriner Volkszeitung ²⁾	Schwerin	120,0
27	HNA. Hessische/Niedersächsische Allgemeine	Kassel	182,0	61	Hamburger Morgenpost ³⁾	Hamburg	119,1
28	Saarbrücker Zeitung	Saarbrücken	171,7	62	Schwarzwälder Bote	Oberndorf	116,6
29	Weser Kurier	Bremen	171,2	63	Lübecker Nachrichten	Lübeck	113,7
30	Neue OZ. Osnabrücker Zeitung	Osnabrück	167,6	64	Dresdner Morgenpost ²⁾	Dresden	110,4
31	Berliner Morgenpost	Berlin	165,8	65	Kieler Nachrichten	Kiel	108,2
32	Berliner Kurier ³⁾	Berlin	165,5	66	Frankfurter Neue Presse	Frankfurt/Main	107,2
33	NRZ. Neue Ruhr Zeitung	Essen	165,3	67	Rhein-Neckar-Zeitung	Heidelberg	102,7
34	WZ. Westdeutsche Zeitung	Düsseldorf	162,6	68	Südwest Presse	Ulm	102,0
35	Abendzeitung ³⁾	München	162,3	69	Heilbronner Stimme	Heilbronn	100,8
				70	Trierischer Volksfreund	Trier	100,3

1) Mit einer verkauften Auflage von mehr als 100 000 Exemplaren (Stand: II. Quartal 2001). Auflagen von kooperierenden „Verlagen als Herausgeber“ bleiben unberücksichtigt.

2) Standort neue Bundesländer.

3) Straßenverkaufszeitungen.

4) Zeitungen mit überwiegend überregionaler Verbreitung.

Figure¹ 1: Ranking of German Newspapers (Media Perspektiven 12/2001, p. 619)

¹ For the original figures (high resolution and printable pictures) see: Schütz, Walter J.: Trotz Bewegung im Markt keine wesentliche Erweiterung des publizistischen Angebotes. Deutsche Tagespresse 2001. In: Media Perspektiven

2. Daily Newspapers within the context of the German Media Market in 2000 - Results from the Report by Christa-Maria Ridder & Bernhard Engel (Media Perspektiven 3/2001)

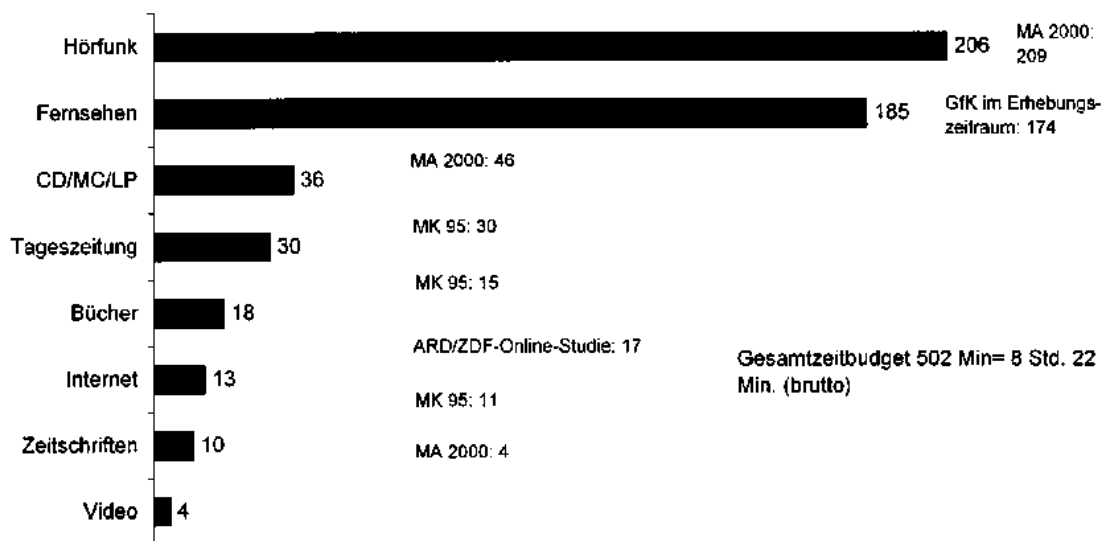
2.1 Budget of Time for Media Consumption (p. 104 ff.)

The daily amount of Media consumption is approximately 8.5 hours. Within the past 20 years, this amount has experienced an increase of 60 percent. As a result of the decrease in work hours and recent demographic changes - notably the intensive use of media by those in the 50 years and older age bracket – an expansion within the realm of media programming has been found. This expansion encompasses all forms of media and the area of media in general. In the field of television and radio, the selection has increased by more than a factor of 10. CDs, CD-ROMs, videos, and everything found in the World Wide Web are now available. However, the consumption of media has yet to increase enough to keep up with this pace of expansion. Results of this situation include a promotion of competition between the different types of media (inter media competition), as well as an increase in competition within each individual branch of media (intra media competition). Parallel to this, an increasing fragmentation of the audience has taken place, resulting in new, differentiated groups of media consumers.

Almost 80 percent of media consumption is oriented around radio and television (p. 105)

As always and in spite of the increase in inter media competition, television and radio occupy the greatest amount of time in the realm of media consumption. Of the 502 minutes (100%) each German adult spends daily (determined by averaging time used in the course of one week), 206 minutes are applied towards listening to the radio (41%), 185 minutes watching television (37%), and 13 minutes using the internet (3%). Time spent reading the newspaper occupies 30 minutes (6%) of the daily budget. The amount of time used reading a book is an average of 18 minutes (4%) daily.

**Abb. 1 Nutzungsdauer einzelner Medien pro Tag (Montag-Sonntag)
in Min.**



Quelle: Massenkommunikation 2000.

Figure 2: Daily amount of media consumption (Media Perspektiven 3/ 2001, p. 105)

Television, radio, and newspapers continue to have the largest audience (p. 105 f.)

In regards to the amount of attention each media receives daily (“Reichweite”), traditional media sources – TV, radio, and daily newspapers – remain on top. According the results of the study “Massenkommunikation 2000”, television, radio, and daily newspapers still receive the greatest amount of attention. Each day, 85 percent of Germans have access to television and radio. The oldest form of media, the daily newspaper, enjoys 54% of the adult German audience. In contrast, internet, which

entered the market within the past few years and received the greatest amount of publicity occupies a relatively small amount of the daily budget. Although over 30% of the population uses the internet for private, personal purposes, only 10% are online each day.

2.2 Motivation for Newspaper Reading (p. 110 f.)

The main reasons for reading the newspaper are:

1. Information,
2. Ability to talk about it,
3. Intellectual stimulation.

Those who read the newspaper place a great amount of importance up its role as an “information provider. According to a ranking of the motivations one has for reading the newspaper, the desire to be informed is without a doubt on top (98%). The desire to be able to talk with others about the news comes in second with 82% and third place is occupied by the desire to be intellectually stimulated (70%). Astoundingly, fourth place is “because it is fun” (67%). Further down the list, one finds a ranking of motivations different from that found with television and radio. Following the reading of newspapers out of habit (55%), we find “because it helps me deal with everyday life” (51%) and “because I can relax while reading it” (42%). At the bottom of the list are “so that I don’t feel alone” (10%) and “because I like to use it to forget about everyday life” (9%).

Reasons for reading the newspaper according to demographic group (p. 111)

As with television and radio, the reasons for reading the newspaper remain fundamentally stable for each social-demographic group. The various degrees of differentiation between each social-demographic group’s ranking of motivations for reading the newspaper are much smaller than those for watching television. Gender can hardly be used as a determinate in differentiating between the various motivations one could have for reading the newspaper. In other words, men and women’s motivations for reading the newspaper hardly differ.

Older people place an especially strong emphasis on the informative function of newspapers

The main differences occur in the “young reader” age bracket (14 to 29 years old). They value the newspaper for its role in helping them orientate themselves in their daily lives. The 30 to 49 year age group differentiates itself from others through its pragmatic approach to newspapers. For them, this medium’s informative nature is of just as much importance, as it is to others. However, other motivations play a slightly less important role for them. A more “classic” relationship to newspapers is found in the over 50 age group. Here, the primary reasons for reading newspapers (information, ability to talk about issues, intellectual stimulation) play a greater role than they do in any other age group. Education level has only a slight influence on a subjects’ reasons for reading the newspaper. In comparison to their peers, who have a higher level of education, those of lesser academic stature place more importance on their ability to discuss current events. Two other notable motivations found within this group are: the ability to escape everyday life and the chance to not feel alone. In regards to the three primary motivations for reading newspapers, however, very few differences exist.

3. Structure of the German Newspaper Market - Results from the Report of Walter J. Schütz on 1999 - 2000 (Media Perspektiven 12/2001)

3.1 Number of Newspapers (p. 602 f.) and Issues (p. 616)

The number of “basic newspaper items” has increased from 135 to 136 units. Two regional newspapers have been taken over by and integrated into other newspapers. The *Financial Times Deutschland* was founded in February 2000 by the publisher *Gruner + Jahr*. Another primarily economic-centered newspaper, the *Handelsblatt*, has increased its number of publications covering financial developments and topics. Thus, it is now considered a daily newspaper. Five further, newly founded newspapers have failed. But, behind the statistical continuity, a steep decline in the number of publishers has occurred.

The number of “separate daily issues” has increased slightly from 1581 auf 1584 (p. 616). This is an effect of the economical planning made by the publishers, who use two opposing strategies: one, to reduce costs by combining local issues; the other, to split up issues into smaller regional versions in to order to reach smaller, regional audiences.

3.2 Additional Offers of Quality Newspapers

The “quality” newspapers have also created additional choices. In congruence with Germany’s change of capitals from Bonn to Berlin (September 1, 1999), the *Frankfurter Allgemeine Zeitung* introduced a local edition titled *Berliner Seiten* and increased its already strong competition in the Berlin newspaper market. On April 3, 2000, the first English edition of the *Frankfurter Allgemeine Zeitung* was published as a special supplementary section.

① Tagespresse: Statistik im Überblick

Jahr ¹⁾	Publizistische Einheiten		Verlage als Herausgeber		Ausgaben		Verkaufte Auflage in Mio	
	absolut	Index	absolut	Index	absolut	Index	absolut	Index
1954	225	100	624	100	1 500	100	13,4	100
1964	183	81	573	92	1 495	100	17,5	129
1967	158	70	555	86	1 416	94	18,0	134
1976	121	54	403	65	1 229	82	19,5	146
1979	122	54	400	64	1 240	85	20,5	155
1981	124	55	392	63	1 258	84	20,4	152
1983	125	56	385	62	1 255	84	21,2	158
1985	126	56	382	61	1 273	85	20,9	156
1987	121	54	(375)	(60)	•	•	20,7	154
1989	119	53	358	57	1 344	90	20,5	152
1989 DDR	57	–	58	–	291	–	9,6	–
1991	158	100	410	100	1 673	100	27,5	100
1993	137	87	384	94	1 601	96	25,4	95
1995	135	85	381	95	1 617	97	25,0	92
1997	135	85	371	90	1 582	95	24,6	90
1999	135	85	355	87	1 581	95	24,1	88
2001	136	86	356	87	1 584	95	23,7	87

1) 1954-1989: altes Bundesgebiet, ab 1991 inkl. neuer Bundesländer

Figure 3: An overview of the development of “basic newspaper items”, publishers, “separate daily issues” and number of copies sold from 1954 to 2001 (Media Perspektiven 112/2002, p. 603)

3.3 Frequency of publication (numbers of days per week) has continued to increase

In the timeframe of two years – 1999 to 2001 – one can see an increase in the frequency of publication (figure 4 and 5). Two newspapers, the *Mannheimer Morgen* and the *Kreiszeitung*, have entered the category of daily publication. There were no cases of reduction in frequency of publication, ie. reduction in the number of publications per week.

⑧ Erscheinenshäufigkeit der Ausgaben der deutschen Tageszeitungen 1954 bis 2001¹⁾

	1954		1964		1976		1983		1985		1989		DDR 1989	
	abs.	in %	abs.	in %	abs.	in %	abs.	in %	abs.	in %	abs.	in %	abs.	in %
Ausgaben gesamt	1 500	100,0	1 495	100,0	1 229	100,0	1 255	100,0	1 273	100,0	1 344	100,0	291	100,0
davon mit Erscheinensweise														
2 x wtl.	18	1,2	17	1,1	7	0,6	6	0,5	5	0,4	5	0,4	-	-
3 x wtl.	91	6,1	57	3,8	20	1,6	21	1,7	21	1,6	12	0,9	-	-
4 x wtl.	144	9,6	58	2,5	3	0,2	3	0,2	3	0,2	3	0,2	-	-
5 x wtl.	6	0,4	2	0,1	10	0,8	12	1,0	10	0,8	9	0,7	-	-
6 x wtl.	1 235	82,2	1 373	91,9	1 189	96,8	1 158	92,3	1 143	89,8	1 205	89,7	291	100,0
7 x wtl.	6	0,4	8	0,5	-	-	55	4,4	91	7,2	110	8,2	-	-
	1991		1993		1995		1997		1999		2001			
	abs.	in %	abs.	in %	abs.	in %	abs.	in %	abs.	in %	abs.	in %		
Ausgaben gesamt	1 673	100,0	1 601	100,0	1 617	100,0	1 582	100,0	1 581	100,0	1 584	100,0		
davon mit Erscheinensweise														
2 x wtl.	6	0,4	6	0,4	3	0,2	3	0,2	4	0,3	2	0,1		
3 x wtl.	9	0,5	9	0,6	9	0,5	9	0,5	8	0,5	7	0,4		
4 x wtl.	1	0,0	1	0,1	1	0,1	1	0,1	1	0,1	1	0,1		
5 x wtl.	8	0,5	8	0,5	2	0,1	2	0,1	2	0,1	4	0,3		
6 x wtl.	1 532	91,6	1 425	89,0	1 495	90,2	1 447	91,5	1 428	90,5	1 405	88,7		
7 x wtl.	117	7,0	152	9,5	143	8,8	120	7,6	138	8,7	165	10,4		

1) Bis 1989 BRD West, ab 1991 einschl. neue Bundesländer

Figure 4: Developments in the publication frequency of German daily papers (Media Perspektiven 12/2001, p. 617)

⑨ Erscheinenshäufigkeit der Abonnementzeitungen nach Auflagen 1985 bis 2001¹⁾

	1985		1989		DDR 1989		1991		1993	
	abs.	in %	abs.	in %	abs.	in %	abs.	in %	abs.	in %
Auflagen Abozeitungen gesamt	14 343,3	100,0	14 681,4	100,0	9 436,9	100,0	20 455,1	100,0	19 203,6	100,0
davon mit Erscheinensweise										
2 x wtl.	13,2	0,1	13,7	0,1	-	-	14,4	0,0	14,3	0,1
3 x wtl.	57,7	0,4	35,5	0,2	-	-	28,4	0,1	28,7	0,1
4 x wtl.	4,5	0,0	4,5	0,0	-	-	1,7	0,0	1,7	0,0
5 x wtl.	91,6	0,6	84,8	0,6	-	-	53,1	0,3	52,3	0,3
6 x wtl.	12 868,3	89,7	13 093,1	89,2	9 436,9	100,0	18 770,3	91,8	16 817,8	87,9
7 x wtl.	1 308,0	9,1	1 450,0	9,9	-	-	1 587,2	7,8	2 234,8	11,6
	1995		1997		1999		2001			
	abs.	in %	abs.	in %	abs.	in %	abs.	in %		
Auflagen Abozeitungen gesamt	19 068,5	100,0	18 711,5	100,0	18 329,8	100,0	17 982,5	100,0		
davon mit Erscheinensweise										
2 x wtl.	7,9	0,0	7,9	0,0	13,3	0,1	5,2	0,0		
3 x wtl.	32,7	0,2	27,6	0,1	24,7	0,1	26,7	0,1		
4 x wtl.	1,7	0,0	1,7	0,0	1,0	0,0	0,9	0,0		
5 x wtl.	7,8	0,0	7,7	0,0	7,6	0,0	235,6	1,3		
6 x wtl.	16 902,5	88,6	16 920,4	90,4	16 456,1	89,8	15 769,3	87,7		
7 x wtl.	2 115,9	11,1	1 746,2	9,3	1 827,1	10,0	1 944,8	10,8		

1) Bis 1989 BRD West, ab 1991 einschl. neue Bundesländer.

Figure 5: Development of frequency of publication of German newspaper subscriptions (“Abonnement”) in respect to circulation (“Auflagenhöhe”) (Media Perspektiven 12/2001, p. 617)

3.4 Decline in circulation (“Auflagenhöhe”) of subscription and freely sold newspapers, especially in East Germany

As seen in figure 6, a decrease in circulation of subscription and freely sold newspapers has taken place. The rate of decline is equal in both groups. This decrease can not be attributed to a decline in the earlier, atypically high density of circulation in the New Bundesländer. Here, as we know, the decline in circulation was dramatic. In 1989, newspaper publishers in the former DDR, East-Berlin included, sold 9,641,700 copies. However, in little over 10 years (1989 – 2001), the number of copies sold decreased by 61,1 percent to 3,747,900. Although the decline in newspaper sells is notably less in the Old Bundesländer, it is impossible to ignore the fact that the perpetual decline in newspaper purchases in the

over-the-counter realm, present since 1983, has now also spread to the area of newspaper subscriptions. Until 1991, one could find growth in this division (figure 7). In 1989, there was a total of 13,636,100 subscriptions. By 1999, it was at 13,550,200 (99.4% of the 89 total). In 2001, the number of subscriptions was down to 13,321,300.

⑩ **Publizistische Einheiten, Ausgaben und Auflagen nach Vertriebsformen 1954 bis 2001**

Jahr ¹⁾	Publizistische Einheiten				Ausgaben				Verk. Aufl. in Tsd		Straßenverkaufs-	
	Abonnement- zeitungen		Straßenverkaufs- zeitungen		Abonnement- zeitungen		Straßenverkaufs- zeitungen		Abonnement- zeitungen		zeitungen	
	abs.	in %	abs.	in %	abs.	in %	abs.	in %	abs.	in %	abs.	in %
1954	213	94,7	12	5,3	1 483	99,1	17	0,9	10 867,0	81,3	2 498,3	18,7
1964	172	93,9	11	6,1	1 472	98,5	23	1,5	11 906,1	68,8	5 412,2	31,2
1967	148	93,7	10	6,3	1 395	98,4	23	1,6	12 076,5	66,8	5 966,3	33,2
1976	113	93,4	8	6,6	1 194	97,2	35	2,8	13 256,8	67,9	6 277,3	32,1
1979	114	93,4	8	6,6	1 198	96,6	42	3,4	13 994,1	68,0	6 551,3	32,0
1981	117	94,4	7	5,6	1 218	96,8	40	3,2	14 231,2	69,6	6 205,1	30,4
1983	118	94,4	7	5,6	1 221	97,3	34	2,7	14 311,2	67,5	6 885,0	32,5
1985	119	94,4	7	5,6	1 238	97,2	35	2,7	14 343,3	68,5	6 592,9	31,5
1987	114	94,2	7	5,8	•	•	•	•	14 534,4	70,2	6 181,2	29,8
1989 BRD	113	95,0	6	5,0	1 312	97,6	32	2,4	14 681,4	72,4	5 603,1	27,6
DDR	37	97,4	1	2,6	290	99,7	1	0,3	9 436,9	97,9	204,8	2,1
1991	147	93,0	11	7,0	1 626	97,2	47	2,8	20 455,1	74,8	6 885,0	25,2
1993	129	94,2	8	5,8	1 551	96,9	50	3,1	19 203,6	75,7	6 161,9	24,3
1995	128	94,8	7	5,2	1 570	97,0	47	3,0	19 068,5	76,3	5 935,7	23,7
1997	128	94,8	7	5,2	1 535	97,0	48	3,0	18 711,5	76,1	5 868,7	23,9
1999	128	94,8	7	5,2	1 538	97,3	43	2,7	18 529,8	75,9	5 819,0	24,1
2001	129	94,9	7	5,1	1 541	97,3	43	2,7	17 982,5	75,9	5 694,4	24,1

1) Bis 1989 Deutschland West, ab 1991 inkl. neuer Bundesländer.

Figure 6: Basic newspaper items, separate daily issues, and circulation in respect to the two marketing categories subscription and freely sold. (Media Perspektiven 12/2001, p. 618)

⑪ **Abonnementzeitungen nach Verbreitungsgebiet 1989 bis 2001**

Jahr ¹⁾	Publiz. Einheiten		Verlage als Hrsg.		Ausgaben		Verk. Aufl. in Tsd.	
	abs.	in % ²⁾	abs.	in % ²⁾	abs.	in % ²⁾	abs.	in % ²⁾
Abonnementzeitungen mit überwiegend überregionaler Verbreitung								
1989								
BRD	5	4,4	7	2,0	11	0,8	691,6	4,7
DDR	7	19,4	7	18,9	16	5,5	3 342,9	35,4
1991	10	6,8	12	3,0	25	1,4	1 089,0	5,3
1993	7	5,4	7	1,9	15	0,8	828,8	4,3
1995	6	4,7	6	1,6	18	1,1	764,0	4,0
1997	6	4,7	6	1,7	17	1,1	783,4	4,2
1999	6	4,7	6	1,7	18	1,2	793,1	4,3
2001	8	6,2	8	2,3	21	1,4	1 037,3	5,8
Abonnementzeitungen mit überwiegend lokaler/regionaler Verbreitung								
1989								
BRD	108	95,6	343	98,0	1 301	99,2	13 989,8	95,3
DDR	29	80,6	30	81,1	274	94,5	6 094,0	64,6
1991	137	93,2	385	97,0	1 603	98,6	19 366,1	94,7
1993	122	94,6	366	98,1	1 538	99,2	18 374,8	95,7
1995	122	95,3	365	98,4	1 552	98,9	18 304,5	96,0
1997	122	95,3	355	98,3	1 518	98,9	17 928,1	95,8
1999	122	95,3	339	98,3	1 520	98,8	17 536,7	95,7
2001	121	93,8	338	97,7	1 520	98,6	16 945,2	94,2

1) Ab 1991 einschließlich neue Bundesländer.

2) Basis: alle Abonnementzeitungen.

Figure 7: Subscription newspapers in regards to local and non-local readership (Media Perspektiven, p. 618)

3.5 Tabloidization and the flooding of color pictures lead to a decrease losses in circulation

As a result of the increase in inter-media competition, a wide range of publishing strategies have been developed. Successful newspapers have remained immune to modernization. However, modernized newspapers ie. newspapers practicing internet publishing and using too many color images, are no longer welcomed as positively as they were earlier. The main reasons for their current lack of acceptance is their decline in readability and quality of coverage. This has led to an overall decline in purchases of these newspapers. The financial profits and losses experienced by the major German newspapers can be seen in figure 8. However, it is important to note, the number of publications enjoying a distribution of 100,000 or more copies 70 papers has remained steady.

Figure 8 (see figure 1): Ranking of publishers in respect to circulation (Media Perspektiven 12/2001, p. 619)

3.6 The wide range of newspaper distribution has remained rather unchanged; a potential concentration of publishers has remained latent

Because local and regional newspapers have remained immune to the restructuring, modernization of publications that has occurred within the German market, they have also remained unaffected by the decline in newspaper circulation described above. Thus, the overall rate of decline in circulation has been inhibited. This can be seen in the fact that a reduction in the number of available newspapers has only taken place in three German Bundesländer. An increase has even been observed, nonetheless only in Berlin, which now receives the Berlin edition of the *Frankfurter Allgemeine*. This addition has led to there being a total of seven available publications in the Berlin area. Since 1999, each region can choose between more than one newspaper. 41.9 % of Germans can be informed about current, local news by only one, single newspaper, but 58.1 % can choose between more than one provider. A newspaper density of 2 pages or more indicates an editorial menagerie, when newspapers sold over the counter contain local reports.

⑬ Zeitungsdichte in der Bundesrepublik Deutschland 1954 bis 2001

Jahr ¹⁾	Kreisfreie Städte/Kreise													
	gesamt		davon: mit Zeitungsdichte											
	abs.	in %	1 abs.	1 in %	2 abs.	2 in %	3 abs.	3 in %	4 abs.	4 in %	5 abs.	5 in %	6 abs.	6 in %
1954	558	100,0	85	15,2	162	29,0	190	34,1	89	15,9	28	5,0	2	0,4
1964	566	100,0	121	21,4	201	35,5	184	32,5	53	9,4	6	1,1	-	-
1967	564	100,0	145	25,7	228	40,4	152	27,0	35	6,2	3	0,5	-	-
1976	343	100,0	156	45,4	139	40,5	37	10,8	7	2,0	3	0,9	1	0,3
1979	331	100,0	150	45,3	133	40,2	38	11,5	5	1,5	4	1,2	-	-
1981	328	100,0	152	46,3	133	40,5	34	10,4	4	1,2	4	1,2	-	-
1983	328	100,0	154	46,9	132	40,2	32	9,8	4	1,2	5	1,5	-	-
1985	328	100,0	157	47,9	136	41,4	27	8,2	3	0,9	4	1,2	-	-
1989	328	100,0	160	48,8	132	40,2	28	8,5	2	0,6	5	1,5	-	-
1993	543	100,0	296	54,5	198	36,4	35	6,4	9	1,7	4	0,7	-	-
1997	439	100,0	242	55,1	164	37,4	24	5,5	4	0,9	4	0,9	-	-
1999	440	100,0	244	55,5	164	37,3	23	5,2	4	0,9	4	0,9	-	-
2001	440	100,0	246	55,9	163	37,0	22	5,0	4	0,9	4	0,9	-	-

Jahr ¹⁾	Kreisfreie Städte/Kreise									
	7		davon: mit Zeitungsdichte						10	
	abs.	in %	8 abs.	8 in %	9 abs.	9 in %	abs.	in %		
1954	-	-	1	0,2	-	-	1	0,2	2,7	
1964	-	-	-	-	1	0,2	-	-	2,3	
1967	-	-	1	0,2	-	-	-	-	2,2	
1976	-	-	-	-	-	-	-	-	1,7	
1979	1	0,3	-	-	-	-	-	-	1,7	
1981	1	0,2	-	-	-	-	-	-	1,7	
1983	1	0,2	-	-	-	-	-	-	1,7	
1985	1	0,3	-	-	-	-	-	-	1,7	
1989	1	0,3	-	-	-	-	-	-	1,7	
1993	-	-	-	-	-	-	1	0,2	1,6	
1997	-	-	-	-	1	0,2	-	-	1,6	
1999	-	-	-	-	1	0,2	-	-	1,6	
2001	-	-	-	-	-	-	1	0,2	1,6	

1) Bis 1989 BRD West, ab 1995 einschl. neue Bundesländer.

Figure 9: Number of regional newspapers available, according to development of concentration (Media Perspektiven, p. 620)

15) Zeitungsangebot in den Großstädten 2001

(Abonnementzeitungen mit für die betreffende Großstadt bestimmter lokaler Berichterstattung)

| Großstädte über 100 000 Einwohner (n gesamt = 85)

davon:

1. mit nur einer Abonnementzeitung (n = 50)

Augsburg ¹⁾	Freiburg	Hildesheim	Koblenz	Regensburg
Braunschweig	Göttingen	Ingolstadt	Leipzig ¹⁾³⁾	Saarbrücken ¹⁾
Bremerhaven ²⁾	Hamm	Kaiserslautern	Lübeck ¹⁾	Salzgitter
Chemnitz ⁴⁾	Heidelberg	Karlsruhe	Magdeburg ³⁾	Schwerin
Cottbus	Heilbronn	Kassel	Oldenburg ¹⁾	Wuppertal ¹⁾
Darmstadt	Herne ¹⁾	Kiel	Osnabrück	

2. mit zwei Abonnementzeitungen der gleichen Verlagsgruppe (n = 17)

Aachen	Essen ¹⁾	Hannover ¹⁾³⁾	Nürnberg ¹⁾³⁾	Würzburg ¹¹⁾
Bergisch-Gladbach	Fürth	Köln ¹⁾⁴⁾	Oberhausen	
Erfurt	Gera	Leverkusen	Stuttgart ²⁾⁵⁾	
Erlangen	Hagen ¹⁾	Mülheim ¹⁾	Wiesbaden ³⁾	

3. mit zwei Abonnementzeitungen (n = 26)

Bielefeld ¹⁾	Halle ³⁾	München ¹⁾⁴⁾	Potsdam	Ulm
Bochum ¹⁾	Krefeld ¹⁾	Münster ¹⁾¹⁾	Recklinghausen	Wolfsburg ¹⁾
Bonn ¹⁾³⁾	Ludwigshafen	Neuss ¹⁾	Remscheid	Zwickau
Bottrop	Mainz	Offenbach	Reutlingen	
Dresden ¹⁾⁵⁾	Mannheim ¹⁾	Paderborn	Rostock ¹⁾	
Gelsenkirchen ¹⁾³⁾	Mönchengladbach	Pforzheim	Solingen	

4. mit drei Abonnementzeitungen, darunter zwei der gleichen Verlagsgruppe (n = 8)

Bremen ¹⁾³⁾	Duisburg ¹⁾	Hamburg ¹⁾²⁾⁴⁾	Siegen ¹⁾
Dortmund ¹⁾	Frankfurt ¹⁾³⁾	Moers	Witten ¹⁾

5. mit drei Abonnementzeitungen (n = 1)

Düsseldorf¹⁾⁴⁾

6. mit sieben Abonnementzeitungen (n = 1)

Berlin¹⁾⁴⁾

- 1) Großstädte, in denen Abonnementzeitungen regelmäßig auch stadtteilbezogene Ausgaben herausbringen.
 2) Großstädte, in denen außerdem noch selbständige Stadtteilzeitungen für Teile des Stadtgebietes erscheinen.
 3) Großstädte, in denen zusätzlich eine lokal berichtende Straßenverkaufszeitung erscheint.
 4) Großstädte, in denen zusätzlich mehr als eine lokal berichtende Straßenverkaufszeitung erscheint.
 Erscheinungsorte in kursiv = Landeshauptstädte.

Figure 10: Number of available newspapers in towns with more than 100,000 inhabitants (Media Perspektiven, p. 622)

4. Rhacna-Data from Germany: *Bild* and *Frankfurter Allgemeine Zeitung*

4.1 Bild

4.1.1 Circulation

The *Bild*-Zeitung is published six days a week, except on Sundays or bank holidays. Between 1960 and 1980, there was a steep increase in circulation, a decrease was found between 1980 and 2000.

1960

Periodicity	Circulation	Political leaning ²	Distribution ³	Format ⁴
6	3517	9	2	1

² Political leaning: 1 Right-wing, 2 Liberal, 3 Socialist, 4 Independent, 9 Other

³ Main distribution form: 1 Subscription, 2 Single copies sale

⁴ Page format: 1 Broad sheet, 3 Berliner (approx. 2/3 of broad sheet), 3 Tabloid, 9 Other

1980

Periodicity	Circulation	Political leaning	Distribution	Format
6	5544	9	2	1

2000

Periodicity	Circulation	Political leaning	Distribution	Format
6	5393	9	2	1

4.1.2 Price

As a purely purchase newspaper, subscriptions are not possible. In 1960, an edition cost 0.10 German Marks. In 1980, one edition cost 0.30 German Marks and, in 2000, the price was set at 0.70 German Marks.

4.1.3 Market Situation

From the start, the *Bild-Zeitung* has been a popular newspaper, found first through Germany and now even available internationally. It is published in Hamburg and arrives at newstands each morning (Sundays and bank holidays excluded).

4.1.4 Size and Format

Over the course of the years, the number of pages per edition has increased noticeably. In 1960, the *Bild-Zeitung* averaged 5 pages per edition. Between then and 1980, the number of pages increased by 4, totaling 9 pages per edition. By 2000, the average number of pages was at 20 pages per edition.

The *Bild-Zeitung* contains no supplementary material and has used a broad sheet format since 1960.

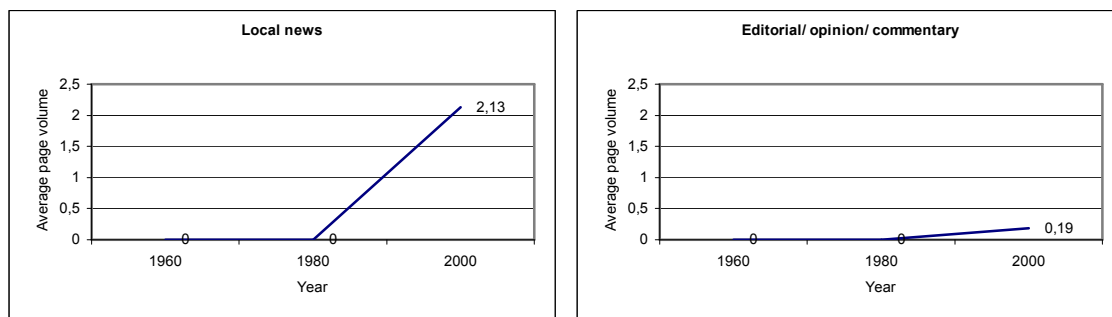
4.1.5 Content

Economy/ business, culture, family pages, debate

In 1960, 1980, and 2000, the *Bild-Zeitung* did not contain sections covering *economy/business, culture, family, or debate* items.

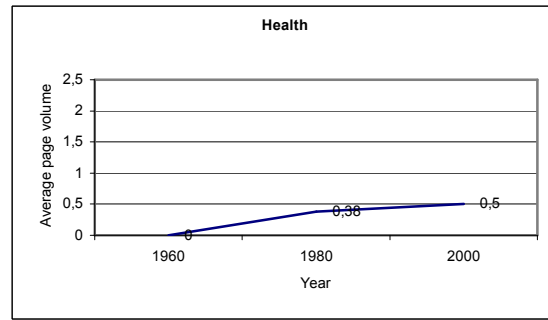
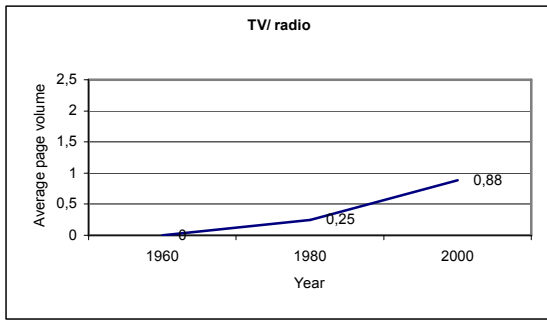
Local news, editorial/opinion/commentary

There has been an increase in the amount of *local news* coverage. The number of pages has increased from 0 in 1960 and 1980 to 2.13 in 2000. The *editorial/opinion/commentary* section first appeared in the *Bild-Zeitung* in 2000 and encompassed 19 pages.



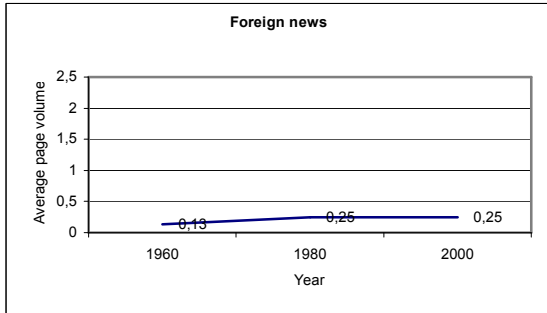
TV/radio, health

From 1960 to 2000, the amount of *tv* and *radio* information increased: in 1960 this area was not represented, in 1980 it received on average 0.25 pages, and in 2000 it had increased to 0.88 pages. Reporting in the area of *health* has also increased. As with *tv* and *radio* information, *health* did not receive coverage in 1960. By 1980, 0.38 pages were used for *health*-related reports. In 2000, this area encompassed a half of a page.



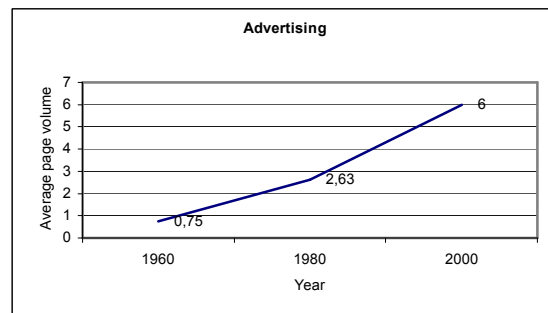
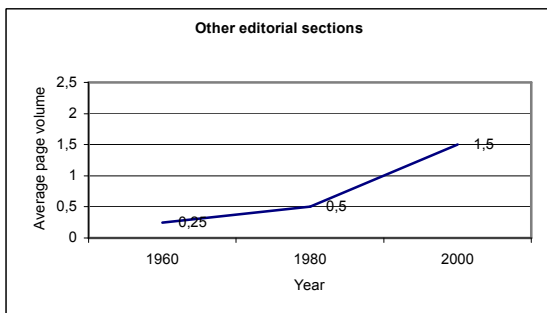
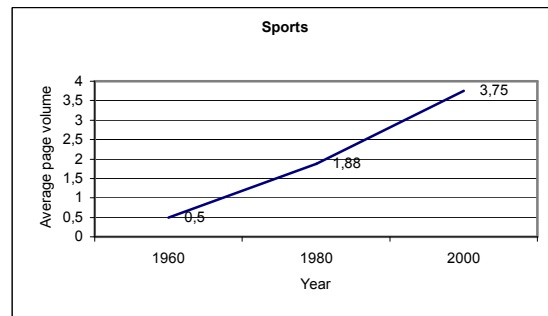
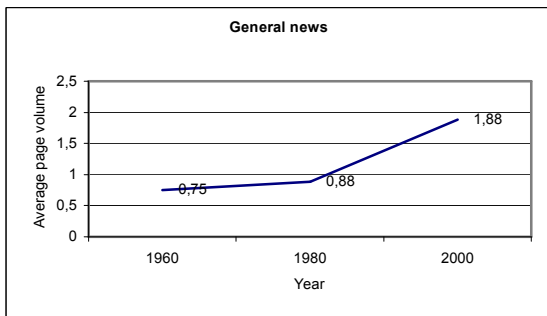
Foreign news

Coverage of *foreign news* has increased from 0.13 in 1960 to 0.25 pages in both 1980 and 2000.



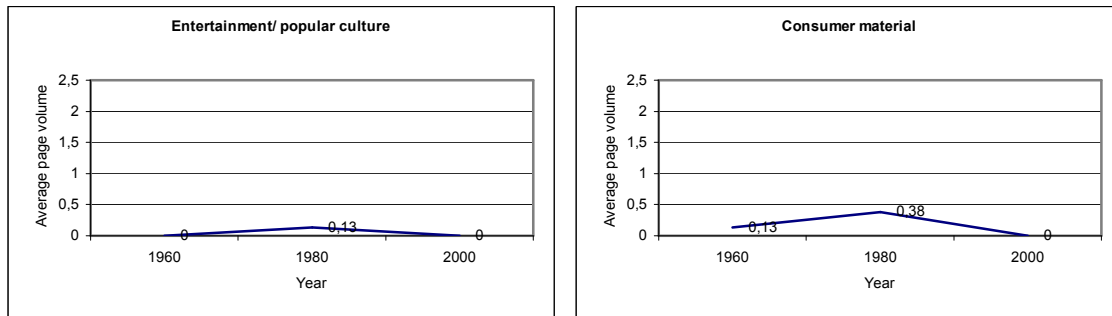
General news, sports, other editorial sections, advertising

Between 1960 and 2000, *general news*, *sports*, *other editorial sections* and *advertising* sections continually received more and more space. *General news* slowly increased from 0.75 to 0.88 pages between 1960 and 1980. In 2000, this area was receiving on average 1.88 pages per edition. In 1960, the *sports* section encompassed one half of a page. By 1980, this had increased to an average of 1.88 and in 2000 the *sports* section made up 3.75 pages of the average edition. A similar tendency can be found in *other editorial sections*. *Other editorial sections* increased from 0.25 pages per edition in 1960 to a half page in 1980 and to 1.5 pages a day in 2000. The greatest increase, however, can be found in the *advertising* section. This category increased from 0.75 pages in 1960 to 6 pages in 2000. In 1980, the number of pages was already at an average of 2.63 per edition.



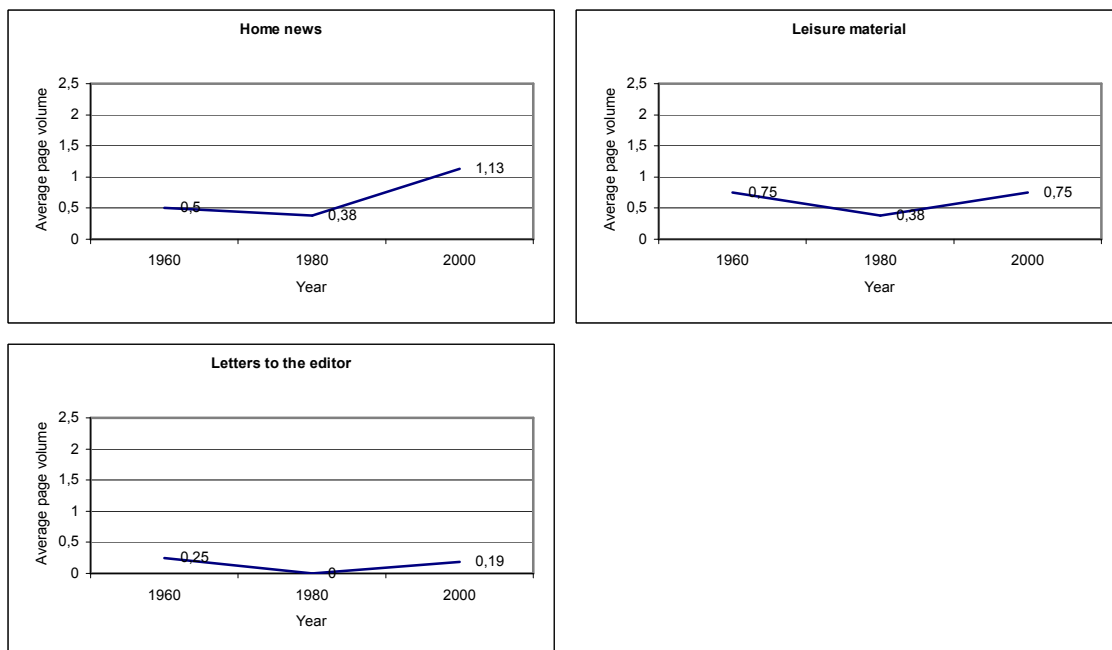
Entertainment/popular culture, consumer material

The peak for *entertainment/popular culture* coverage was 0.13 pages and occurred in 1980. In 1960 and 2000, these areas were not included in the newspaper. *Consumer material* information increased between 1960 and 1980 from 0.13 to 0.38 pages on average, respectively. This category did not appear in the 2000 editions.



Home news, leisure material, letters to the editor

Home news played a bigger role in 1960 (0.5 pages) and 2000 (1.13 pages) than in 1980 (0.38 pages). A similar tendency occurred in *leisure material* reporting: 0.75 pages in 1960, 0.38 pages in 1980, and again 0.75 in 2000. With 0.25 pages in 1960, 0.19 pages in 2000, and nothing in 1980, the *letters to the editor* section also reflected this pattern.



4.2 *Frankfurter Allgemeine Zeitung*

4.2.1 Circulation

The *Frankfurter Allgemeine Zeitung* comes out everyday of the week except Sundays and bank holidays. Since 1960, the number of editions has more than doubled (from 254,000 in 1960 to 524,000 in 2000). The *FAZ* follows a rather politically liberal trend. The majority of its business is done by way of subscriptions.

1960

Periodicity	Circulation	Political leaning	Distribution	Format
6	254	2	1	1

1980

Periodicity	Circulation	Political leaning	Distribution	Format

6	390	2	1	1
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2000

Periodicity	Circulation	Political leaning	Distribution	Format
6	524	2	1	1

4.2.2 Price

In 1960, a single edition of the *FAZ* cost 0.30 German Marks; in 1980, it cost 1 German Marks and in 2000 it was at 2 German Marks. Subscribers receiving home delivery paid 5.50 German Marks per month. Subscribers who picked up their copy themselves paid 4.96 German Marks a month. International subscribers paid 8 German Marks a month.

In 1980, a monthly subscription cost 20.70 German Marks, regardless of home delivery or self-pick-up. Customers requesting a wrapper for each edition paid 27 German Marks a month. International subscribers paid 27 German Marks a month.

In 2000, national and Berlin edition subscription prices were 50 German Marks. The Rhein-Main edition monthly subscription cost 52.20 German Marks. For students, civil servants, and those liable for military service, a subscription was 29.80 German Marks a month. International subscribers paid 68 German Marks a month.

4.2.3 Market Situation

The *FAZ* is a prestigious player in the German newspaper market. It is published in Frankfurt and is distributed both nationally and internationally. Each new edition appears on shelves the morning of its publication.

4.2.4 Size and Format

The pages per edition increased from 15 in 1960 to 30 in 1980 and continued to increase to 70 per edition in 2000. The number of supplementary pages per week was at 10 in 1960, had already increased to 171 in 1980, and was at 176 in 2000. It has a broad sheet format.

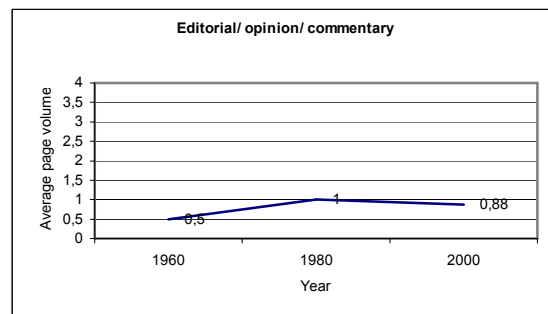
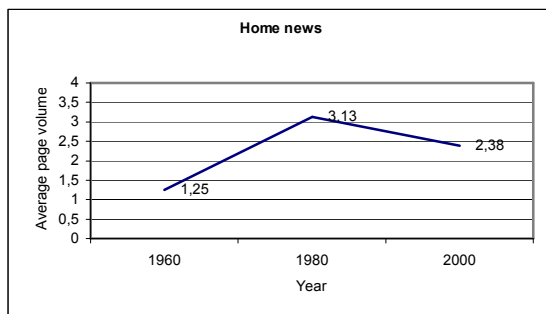
4.2.5 Content

Local news, entertainment/popular culture, health, consumer material, debate

In all three sample years, the *FAZ* did not have a *local news, entertainment/popular culture, health, consumer material* or *debate* section.

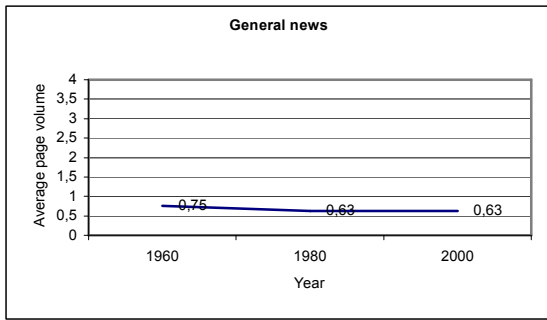
Home news, editorial/ opinion/ commentary

The greatest amount of pages dedicated to a(n) *editorial/opinion/commentary* section was found in the 1980 editions. The *home news* increased from an average of 1.25 pages per edition in 1960 to 3.13 pages in 1980. Coverage then fell to 2.38 pages in 2000. The increases (from 0.5 in 1960 to 1 in 1980) and decreases (0.88 pages in 2000) in the area of *editorial/opinion/commentary* were not as considerable as those in home news, but one still finds the peak value in 1980.



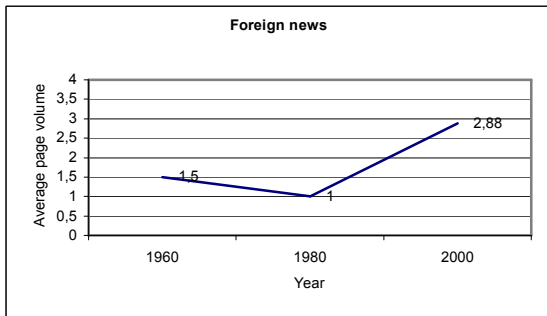
General news

General news is the only category greater in 1960 than in 1980 and 2000. The coverage decreased from 0.75 pages in 1960 to 0.63 in 1980 and remained at that level in 2000.



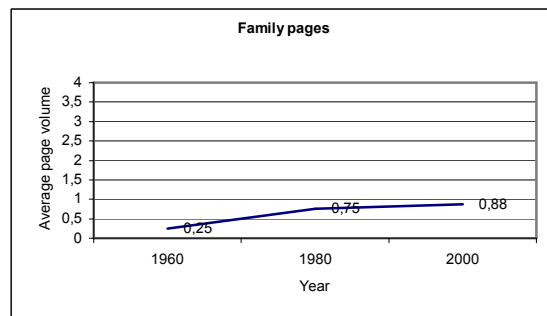
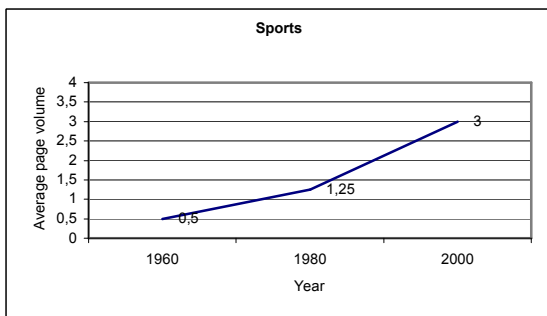
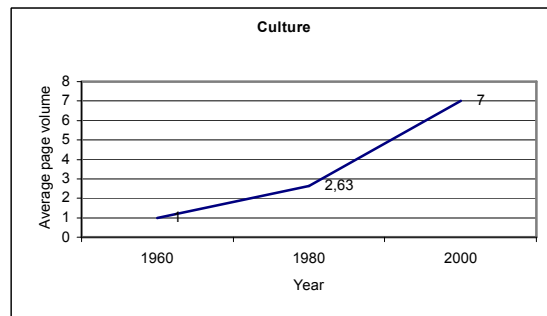
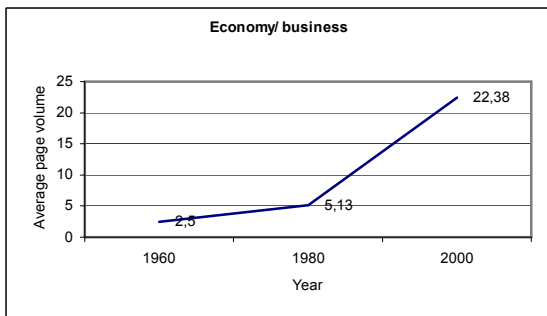
Foreign news

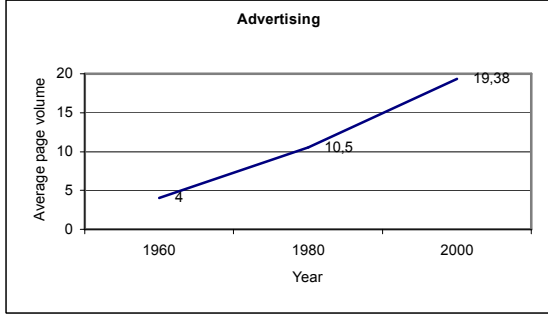
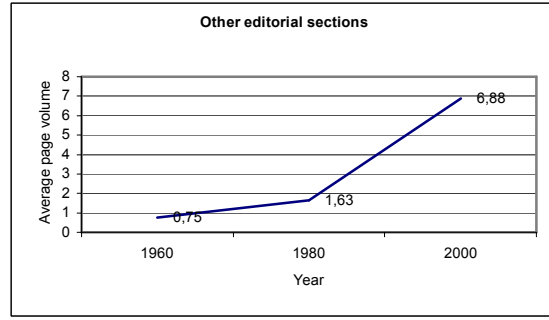
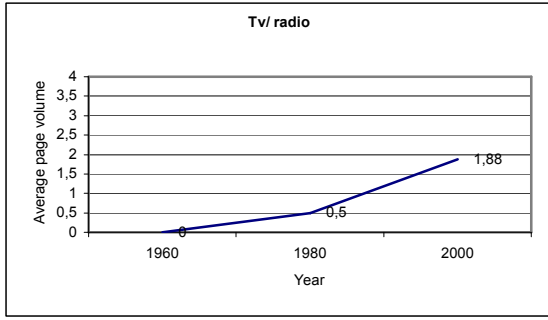
Between 1960 and 1980, there was a decrease (from 1.5 to 1) in reporting on *foreign news*. By 2000, however, the average number of pages per edition had increased to 2.88.



Economy/ business, culture, sports, family pages, tv/ radio, other editorial sections, advertising

A clear increase can be found in the following areas: *economy/business* increased from 2.5 pages in 1960 to 5.13 in 1980 and reached an average of 22.38 pages in 2000. *Culture* also increased from 1 page in 1960 to 2.63 in 1980, to a final 2000 average of 7 pages. *Sports* only received a half of page in 1960. By 1980, this had increased to an average of 1.25 per edition. This trend continued and ended with an average of 3 pages in 2000. The figures for *family pages* (1960 0.25, 1980 0.75, 2000 0.88), *tv/radio* (1960 0, 1980 0.5, 2000 1.88), *other editorial sections* (1960 0.75, 1980 1.63, 2000 6.88), and *advertising* (1960 4, 1980 10.5, 2000 19.38) experienced an even greater, substantial increase.





Leisure material, letters to the editor

In all three sample years, one finds on average 0.25 pages of *leisure material*. The *letters to the editor* increased from an average of half a page in 1960 to 0.63 pages in 1980 and 2000.

