

4 Country report Germany

The media system as a brake on journalistic innovation development

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Introduction

Germany, with a population of 84.3 million is not only the most populous country in the European Union (EU) but also has the largest gross domestic product in the association of states with 4075.4 billion US dollars (IMF 2023; Statistisches Bundesamt 2023). However, economic strength differs in the various regions: the states of the former Federal Republic of Germany (FRG) generally still have a larger gross domestic product (GDP) than the “new states” of the former German Democratic Republic (GDR) 30 years after the German reunification (Statistische Ämter des Bundes und der Länder 2023). It is interesting to note that the GDP strongly coincides with the innovation index in Germany. The German states that also have a strong per capita GDP were ahead of the states with a smaller GDP in the innovation index ranking. The ranking provides “information about the level of innovation capability in the period under consideration” (Statistisches Landesamt Baden-Württemberg 2021). In 2020, Baden-Württemberg led the ranking, followed by Bavaria.

Within the population, 92% use various news services several times a week, and although there is strong criticism of the lack of digitization in Germany, the communications industry is the frontrunner in terms of digitization (Bundesministerium für Wirtschaft und Klimaschutz 2022; Newman et al. 2022, 80). This is also related to the statistic that news is consumed more online and constantly available instead of linearly in the classic media (Newman et al. 2022, 10).

The following outline of the German media system serves as a starting point for the comparison of the framework for innovations in journalism (see Chapter 26). Based on the extra-media sphere background, this chapter will provide a contextualization of the German media system, its historical developments, and categorization of journalistic professionals, which in turn will serve as a basis for explaining the emergence of the individual innovation areas of the Journalism Innovations in Democratic Societies (JoIn-DemoS) project.

Historical developments of the media

In Germany, freedom of communication is considered the central basis of the media system. Historically, these freedoms of communication have not always been liberated. Although they had already played a role around the German Revolution in 1848, they were at the time unable to establish and consolidate themselves under Bismarck's press policy and the subsequent First World War. During National Socialism, the dictatorship abolished these freedoms. After the Second World War, a media landscape shaped by the Allied victorious powers emerged. Newspaper licenses granted by the Allies gave rise to the most important print products still in existence today, such as *DIE ZEIT*, the *Frankfurter Rundschau* or the *Süddeutsche Zeitung* (Meier 2018, 148). It was not until 1949, with the founding of the FRG and the introduction of the constitution, the *Grundgesetz*, that citizens were firmly guaranteed these freedoms of communication (Beck 2021, 39). In addition, the State Press Laws were enacted during the same period (Papier and Möller 1999, 449).

At about the same time, the first public broadcasting service (ARD) was set up in Western Germany; the British BBC acted as a reference model in the case. However, due to Germany's history, public broadcasting was to be more federally fragmented in order to ensure its independence. Therefore, State Broadcasting Laws were established, on the basis of which the regional, third-party programs of ARD, such as the Bayerischer Rundfunk (BR), Hessischer Rundfunk (HR), Radio Bremen (RB), Süddeutscher Rundfunk (SDR) and Südwestfunk (SWF), were created (Pürer 2015, 110). In the field of private broadcasting, there was no strong development until the 1970s and 1980s. Here, various circumstances, such as technical progress, a stronger media policy or broadcasting rulings by the Federal Constitutional Court, supported the emergence (Pürer 2015, 127). In contrast is media development in Eastern Germany (1949–1990). There, a centralized media system was developed, led, and directed mostly by the Socialist Unity Party of Germany (SED), in which both broadcasting and the press were strongly tied to central state or state-affiliated organs and not independent (Meier 2018, 148). After the reunification of the FRG and the GDR in 1990, the East German system was adapted to that of the West. Newspapers were (partially) taken over by West German publishers, and public broadcasting stations were also introduced in the “New Federal States” (Pürer 2015).

Shortly after the German reunification, an originally western German news magazine became a pioneer in the field of online news. On 25 October 1994, *SPIEGEL Online* published the world's first news website (with a one-day lead over the US *Time*), uploading free articles that they reused from the print magazine (Hans 2014).

In recent decades, journalism has been strongly characterized by digital change. In 1997, 7% of Germans used the internet occasionally, whereas in 2020, 72% of the population (54 million) were using the internet on a daily

basis (Beisch and Koch 2021, 488). Media companies also adapted strongly to the development and shifted their content to where the users were on both the internet and social media. The diversification of online presences and the increasing offerings were also one of the reasons why the legitimacy of public broadcasters has been questioned more strongly in recent years (Sehl 2021). Sehl suggests representatives of a market-liberal perspective have been increasingly harsh in their criticism of the public broadcasters because there already exists a diversity of offerings, which is why the public media would become superfluous.

Media system and media policy

Mostly because of Germany's history, Article 5 of the Basic Law (Grundgesetz) ensures that the state cannot intervene in the affairs of the media or even control them. This is where defensive rights against state interference take effect: freedom of opinion, individual freedom of information, and freedom of the press and broadcasting (Meier 2018, 83). Moreover, because of this deliberate distance, there is no general, central media law in Germany, as is the case in many other countries. It is the judiciary that guides the media landscape. For example, the Federal Constitutional Court interprets the Basic Law regarding media decisions, but the Basic Law is not the only source of media guidelines (Beck 2018, 37). Due to Germany's federal structure, there are many state treaties (states) and laws (federation) that regulate the media landscape.

Role of print media

In Germany, the press culture has had strong roots for several centuries. Even compared to broadcasting or other digital media, newspapers still hold a key role. The regional offering of subscription newspapers in particular shapes the picture; a centralization of the news offering, as is the case in the United Kingdom, for example, cannot be observed in Germany. These local offerings are also supplemented by supra-regional quality and tabloid media (Beck 2018, 175). Due to the (financial) independence of the press from the state, Beck (2018, 175) explains that state media policy is "limited to a non-discriminatory fiscal subsidy and privileging of the press." It is argued that the press occupies a public, indispensable role.

Nonetheless, a political parallelism can be observed in the German press, which does not shape the newspapers in terms of party politics but does reveal political tendencies (Hallin and Mancini 2004). The most important daily or weekly newspapers are said to reflect the spectrum of opinion. Whereas, for example, the *Welt* addresses older and more conservative readers, the *Süddeutsche Zeitung* is left-liberal oriented, *Frankfurter Allgemeine Zeitung* is seen as a conservative-liberal newspaper. Another big newspaper in Germany that displays an alternative leftist point of view is the

tageszeitung (Deutschland.de 2012). Even though the newspapers have (financial) independence from the state, one outcome is an economization of the media system, which makes economic enterprises out of newspapers that must survive in a capitalist system. Local newspapers are, therefore, being purchased by large publishers, local editorial offices are being closed, and newspapers' supra-regional sections are being printed in the same way across regions. This limits media diversity, and media concentration is becoming ever stronger. In 2020, the market share of the five largest publishing groups for daily newspapers was around 41.3% (Röper 2020). This media concentration is kept within bounds by specific controls.

In addition, newspapers are struggling with a reduction in both readership and advertising revenues (Hasebrink et al. 2017). Whereas in 2013, around 63% of respondents in Germany still read print media, in 2022, this figure was just 26% (Institut für Medien- und Kommunikationspolitik 2022). The development can also be observed in advertising revenues: in 2003, printed newspapers still earned around 4.68 billion euros from advertising; in 2020, this figure had fallen to only 1.87 billion euros (PwC 2022). At the same time, the circulation of daily newspapers has been decreasing sharply since the early 2000s (22.6 million in 2003 vs. 13.63 million in 2022, including online issues) (BDZV 2023). Increasingly, newspapers are barely offering free information on the internet; they are using different payment models for digital editions. Subscriptions to digital editions are becoming increasingly attractive. The *Süddeutsche Zeitung*, for example, sold 288,000 print copies, including 99,000 ePaper editions and 159,000 digital subscriptions in the first quarter of 2023 (IVW 2023). At 447,000, that's more subscriptions in total than print copies sold in the heyday of the print era in 2000 (427,000) (Institut für Medien- und Kommunikationspolitik 2012).

The strong audience loyalty to printed daily newspapers with fixed subscriptions and the extensive newspaper landscape with around 309 regional newspapers and half a dozen national newspapers has been a major reason why the decline in reach and circulation of printed newspapers has been milder in recent decades than in other countries (BDZV 2023). As a result, there has been little pressure in Germany to invest in innovative digital offerings.

Role of broadcasting

The private sector includes both radio and TV. The radio landscape is dominated by local and regional stations, with around 300 local and regional radio stations, including internet radio (Die Medienanstalten 2023). In the television sector, around 160 private stations are broadcast in Germany (KEK 2023), but the industry is strongly dominated by two large media companies: Bertelsmann with the RTL Group and the ProSiebenSat.1. This is contrasted by public broadcasting. The radio sector comprises 9 ARD stations with 73

regional radio programs (including online radio) and Deutschlandradio with 4 programs. The public TV stations are also located in the nine regional ARD stations, and both ARD and ZDF are listed as cross-regional stations.

The private broadcasters are mainly financed by advertising revenues, whereas the public broadcasters are financed by a license fee, which every household in Germany must pay each month (18.36 euros, Status July 2023). By receiving broadcasting fees, public broadcasting has an educational mandate and must meet certain quality criteria. The dispute over funding and fees frequently involved the Federal Constitutional Court, which brought several broadcasting rulings onto the scene that continue to shape broadcasting today. In addition, each of these public broadcasters is controlled by basically two bodies: a broadcasting council and an administrative board. The broadcasting council is responsible for ensuring compliance with the programming mandate and verifies that state treaties are being observed. The administrative board, on the other hand, is not concerned with program compliance but oversees the management, determines the budget, and controls the participation of companies. The members of both bodies are made up of associations that are defined by law and are supposed to represent a cross-section of the population. For example, trade unions, representatives of the church, or members of sports associations are represented in both bodies (Schwartz 2022).

The stable financing of public broadcasting in Germany, with a very large number of programs, especially on the radio, not so much on TV, has hardly created any pressure to innovate in the editorial departments. For some years, however, broadcasters have noticed that the audience has become older, especially for linear TV. Since the broadcasting fee, and thus the financing of public broadcasting, is supposed to function as a solidarity model, the radio stations had to address younger audiences again, who, in turn, could no longer be catered to because of the linear use of the formats. Innovation labs, therefore, developed digital formats for a young audience, which have been bundled under the funk internet service since 2016 (Frank 2016).

Role of digital media

Due to the increasing use of smartphones and the possibility of greater cross-mediality online, around 70% of Germans used news sites as a source of information in 2020, whereas in 2012, 61% of the respondents said they had consumed online news in the past week, this source of information was in last place in the ranking (TV with 87%; print and radio with 68% each) (Newman 2012, 12; Newman et al. 2020, 71). The technical possibilities have also shaped journalism in recent years: a multi-media approach without having to change the medium, the expansion of the offerings of already established media houses, as well as the possibility of adapting content to users have changed the media landscape. The ability to disseminate news is becoming more accessible to all, so “journalistic websites are also facing

unprecedented competition, which raises the question of the future of journalism” (Meier 2018, 160). Many legacy media have been shifting their main focus to the web, but the established media houses have fierce online competition, with groups like Facebook or Google vying for users’ attention. But it is not only increasing economic competition that journalistic editorial departments must contend with. Since the first news website in Germany in 1994, online content has been offered free of charge. This “freebie mentality” still plays a major role, especially on the internet: a PwC (2019) study shows that 40% of the German respondents would not be willing to pay for journalism on the internet even 30 years after online articles originated. Another transformation can be observed in terms of technology. As technology becomes increasingly widespread and accessible, more funding opportunities for journalistic houses, as well as for other companies, are emerging, with personal behavior and profile data being used as a business model (Beck 2018, 325). Legally, various regulations take effect in this context. The State Media Treaty acts as the authority for regulating journalistic content, whereas the Telemedia Act is responsible for all technical and economic issues (Beck 2018, 314).

News consumption

Over the past decade, media use has changed dramatically in Germany. The Digital News Report (Newman et al. 2022, 11) not only found that progressively more people disconnect from news consumption, but they also selectively avoid news. That “underlin[es] the critical challenge news media face today: connecting with people who have access to an unprecedented amount of content online and convincing them that paying attention to news is worth their while.” This can partly be observed in Germany: various studies (including Obermaier 2016 cited by Reinemann et al. 2017) show that trust in the media in Germany has always been between 30% and 40% since the 1980s. The current Digital News Report (2022) sees Germany at a 50% trust rate, which has increased since 2019 from 47% (Newman et al. 2019, 86). Nevertheless, since 2008, society has become increasingly divided according to how much they trust the media; trust is growing, but so is distrust (Uni Mainz 2021).

Germans generally inform themselves less through journalistic publications. Even though the use of online media and social media channels has increased since 2013 (online: 2013: 60%, 2022: 68%, social media: 2013: 18%, 2022: 32%), the use of all other media studied (TV, print, and radio) has declined significantly (Newman et al. 2022, 81). The audience’s interest has also decreased. Whereas in 2015, around 74% of respondents were still strongly or very strongly interested in news, in 2022, the figure was only 57%. Although the figures are still considered very stable in an international comparison, they still show declining tendencies and need to be considered (Newman et al. 2022, 81).

Direct and indirect innovation funding for journalism

German media policy has tended to take a rather negligible view of direct funding for innovations in journalism. Nevertheless, a funding landscape has developed in recent years, with various initiatives awarding funds for innovation projects (Buschow and Wellbrock 2020). These include private and public programs that combine start-up capital and coaching (for example, MediaLab Bayern or the Journalism Lab of the Media Authority of North Rhine-Westphalia), innovation funds from the German Federal Ministry for Economic Affairs and Energy (Bundesministerium für Wirtschaft und Energie 2020), or government funding from the federal budget for the “promotion of the digital transformation of publishing, for the promotion of sales and distribution of subscription newspapers, magazines and advertising journals” (Deutscher Bundestag 2020).

At the same time as direct funding, indirect structures have been developed to create incentives for newsrooms to innovate further. One important point in this regard is tax discounts, which are “granted either depending on a company’s volume of innovation or its expenditure on research and development” and tax breaks for journalistic start-ups (Larédo et al. 2016 cited by Buschow and Wellbrock 2020, 30).

The industry: performance of companies

Today, Germany’s broad-based media landscape is still based on the historical developments the country has undergone over the past 80 years. Compared to its German-speaking neighbors in Austria and Switzerland, however, the largest media company in 2021 was Bertelsmann SE & Co. KGaA, with annual revenues of around 18.6 billion euros (Institut für Medien- und Kommunikationspolitik 2022), but it is not organized under public law. However, only part of the Bertelsmann Group’s business flows into the creation of journalistic products: Bertelsmann brings together smaller divisions, which, according to its own information, are decentralized and thus act independently of one another (Bertelsmann 2013). In the area of journalistic companies, this includes both RTL Group and its subsidiary Gruner + Jahr (Institut für Medien- und Kommunikationspolitik 2023). The second-largest media group is ARD, a public broadcaster with third-party programming, with 6.9 billion euros (Institut für Medien- und Kommunikationspolitik 2022).

The groups that follow the big two in the ranking represent a large part of the media landscape in Germany. These are both public broadcasters, such as ZDF (approximately 2.4 billion euros), and private groups with various TV stations, such as the ProSieben Sat.1 Group (approx. 4.5 billion euros). There are also publishing groups like Axel Springer SE (approx. 3 billion euros), which, as a result of increasing digitization, no longer combines just print products but also online websites and TV stations (Institut für Medien- und Kommunikationspolitik 2022).

Professionals

Since “journalist” is not a protected job title in Germany, the figures from surveys vary. According to the “Agentur für Arbeit” (the German Employment Agency), around 130,000 people were working as journalists in newsrooms in 2021 (Bundesagentur für Arbeit 2022). However, this agency also statistically counts people as editors who are not employed full-time in journalism or engaged in journalistic work – e.g., technical editors. By contrast, there were about 41,000 full-time journalists across all media. This figure does not include part-time media professionals or freelance journalists who earn less than 50% of their income from journalism. Likewise, there are also around 122,000 freelance full-time and part-time journalists and amateur journalists working in the field who shape the image of the journalism landscape (Steindl et al. 2019). Meier (2018) stresses that full-time freelance journalists earn less compared to their permanent colleagues. A study by Hanitzsch and Rick (2021, 5) shows that 44.4% of journalists work as freelancers, while only 24.9% have a permanent, unlimited employment contract with a media company.

In the area of leadership positions by medium, the distribution of the (binary) gender ratio still plays a predominant role. Women¹ are still under-represented in positions of power in editorial offices (Janson 2019), especially in print media, where only 10.2% of leadership positions were held by women in the year 2019. Nonetheless, women are finding their way into newsrooms. Hanitzsch and Rick (2021, 4) explain that 37.7% of respondents reported being female and working full-time as a journalist. This compares to 61.7% male and 0.6% diverse colleagues. German journalism has a diversity problem, and not only in gender distribution. Although almost one in four of the German population has a migration history, surveys by the *Neue Deutsche Medienmacher*innen* show that just 6% of editors-in-chief have an immigration history. Of these, half come from neighboring countries and not from other major immigration countries (*Neue Deutsche Medienmacher*innen* 2020, 3).

Moreover, German journalists identify with different understandings of their roles, as the *Worlds of Journalism (WoJ)* study (Hanitzsch et al. 2016) notes. A small standard deviation in the classic journalistic role models (e.g., report things as they are) revealed that journalists in Germany were mostly in agreement in the survey that these role perceptions are strongly valuable to the profession. In this context, Hanitzsch et al. (2016, 3) report that a large part of the respondents rejected the so-called brown envelope journalism and that a strong normative worldview is rather standard among German journalists. However, Hanitzsch et al. (2016) do note that the job description had changed significantly in the years leading up to the *WoJ* survey in 2016. The journalist-respondents talk about technical changes, such as the use of social media or a stronger focus on user-generated content but also of an augmentation of “market-related influences” and audience replies and feedback (Hanitzsch et al. 2016, 5).

Conclusion

The historical development of the German media landscape has been strongly characterized by technical change and relatively little influence from state institutions since the Second World War. Still, with the dual broadcasting system, private publishing houses, an increase in online journalism, and the usage of social media by established media companies, the media landscape can be perceived as quite diverse. Political parallelism (albeit less pronounced than in other countries) can be observed in the German press landscape, especially in the context of supra-national issues, representing different schools of thought. Nevertheless, a few large media companies dominate the market, especially in the print sector. The market share of the five largest publishing groups for daily newspapers was around 41.3% in 2020 (Röper 2020, 332). These same media companies are buying up small, important local newspapers and thus spreading their print brands – furtively – across regions.

Nevertheless, German society has become increasingly divided according to how much they trust the media (Uni Mainz 2021). Further, a negative trend can be observed in trust in journalism, but still, “trust remains relatively high by international standards, even if there has been a small decline overall, with most brands also showing marginal decreases” (Newman et al. 2022, 81).

Due to a (in part) lack of willingness to pay on the part of users and the freebie mentality established in the early years of online journalism, the profession of journalism is slipping into precarity. For this reason, a trend can be observed in the growing commercialization of journalism, with media houses needing to innovate in the context of improving their revenue streams. Therefore, they have the urge to be creative in terms of financing. Also, due to the loss of income for media companies, journalist positions are often not filled. This means that just a quarter of the people working as journalists have permanent positions, and about 44.4% work as freelancers (Hanitzsch and Rick 2021, 5).

Based on the findings, two sides of the innovation framework can be identified. On the one hand, various intra- and extra-media system circumstances and developments lead to the potential to innovate. Examples include the financial strength of the few large media companies and the scant innovation support provided by the German state. On the other hand, there is the partial unwillingness of users to pay for their news, which also contributes to the precarity of journalists. In contrast to that, newspapers, as well as private broadcasters, still have a loyal usership; the range of local newspapers (although they are nevertheless also financed by larger companies) is still so large that there is often no strong pressure to innovate. Public broadcasters have been more under pressure from upcoming critics about their structure and scandals about corruption and nepotism, but still, the mandatory user contributions finance time-honored journalistic products.

The system, with all its developments, has innovation potential that has been or is still being used by some media companies. For example, media companies are getting creative in using systems and associated benefits to convince people who were previously unwilling to pay for online content to pay for journalistic content after all.

Note

- 1 The term “woman” is understood in the context of this paragraph in a binary gender relation. Flinta* (Female, Lesbian, Intersex, Trans and Agender, and * for all who do not identify as cis men) were not included in the studies listed.

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