

Sector Portrait



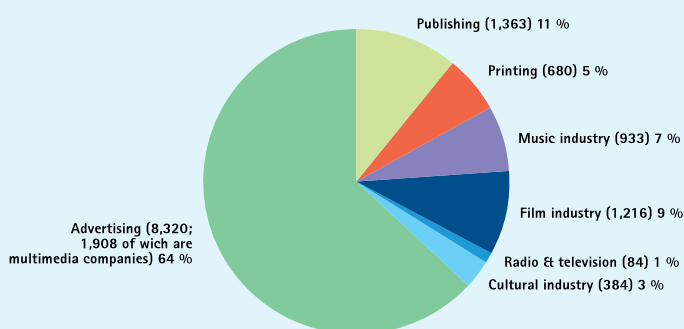
Media Capital Hamburg

Hamburg still remains Germany's number one media capital: around 62,000 people work here in 12,980 companies of the advertising and publishing sector, of the cultural sector, in the print and broadcasting media, or in the music, TV and film industries. As a result, the number of media companies in Hamburg has increased by 20 percent since 2002, and as of 2000 has even risen by one third. The major publishers Axel Springer, Gruner + Jahr and Heinrich Bauer account for almost 50 percent of the market share in German public media. Advertising agencies such as Springer & Jacoby and Jung von Matt regularly hold top rankings at national and international competitions. The Norddeutscher Rundfunk (NDR), as the third largest ARD public broadcasting agency for television and radio, is also based in Hamburg. This industry sector also plays a major role in the political landscape: The competence cluster media is part of the Hamburg senate's overall concept "Metropolis Hamburg – Growing City". The media capital is presented in a media portal at www.medien.hamburg.de. In addition, the Senate created the position of media coordinator which was filled by Dr. Walter Richtberg.

The city of Hamburg offers media companies a unique combination of location advantages:

- A media landscape representing all industries with a large variety of businesses. This is a vital issue for the increasing media convergence.
- A large variety of competent service providers, particularly including small and medium-sized contractors.
- Qualified and skilled personnel.
- The high quality of life and infrastructure in this metropolis.
- A creative environment with many interesting contacts and active networks.

Industry structure of 12,980 Hamburg-based media companies, 2nd half of 2005 (by numbers of companies)



Note: Of a total of 12,980 companies 4,070 are listed in the Commercial Register
 Source: Companies counted by Hamburg Chamber of Commerce, January 2006 © Hamburg Chamber of Commerce

Publishing

- 1,363 publishing companies
- 680 print companies

Publishing has had a very long tradition in Hamburg. As early as in 1830, Hamburg was known as "Germany's stronghold of news-



Media variety "Made in Hamburg".

Photo: Roland Magunia

papers", a reputation still valid today. Both Axel Springer Verlag, Europe's largest newspaper publisher, and Gruner + Jahr, as Europe's largest magazine publisher, are located in Hamburg.

But also Heinrich Bauer Verlag, Jahreszeitenverlag and Spiegel-Verlag Rudolf Augstein are established names in the German media landscape. The Deutsche Presse-Agentur (dpa), as the largest German news agency and one of the leading agencies world-wide, sells reports to almost all editorial offices in Germany.

In Hamburg, Gerd Bucerus founded the newspaper "Die Zeit", Rudolf Augstein came up with "Der Spiegel", Henri Nannen created the magazine "Stern" and Axel Springer founded the tabloid "Bild" and the local newspaper "Hamburger Abendblatt". A large variety of other newspapers and magazines add to this list, including "Financial Times Deutschland", "Geo" and "TV Movie" as well as award-winning trade journals such as "Mare" or "Brand Eins". When reading a German newspaper or magazine, chances are high that it is a publication from Hamburg: Nine out of ten of the best-selling titles with the highest circulation originate from here.

The award ceremony of the LeadAwards, Germany's most renowned award for print media, takes place in Hamburg once a year. Young journalists with outstanding achievements in newspaper and magazine journalism are awarded with the "Henri-Nannen-Preis" (prize for print journalists).

The publishing houses in Hamburg are also strong in the sectors specialized press and sales bulletins. The two largest German tourism magazines – "FVW International" and "Travel Talk" – are printed by the Hamburg-based publisher Dieter Niedecken. Deutsche Verkehrs-Verlag GmbH publishes the leading logistics magazine called "Deutsche Verkehrs-Zeitung" (German Traffic-Magazine). The corporate publishing products of Hoffmann & Campe, Gruner + Jahr, Corporate Media and schmitz-komm.de range among the most successful products of the sector.

Hamburg's book publishers enjoy a good reputation as well. The German "Harry Potter" volumes are published by Carlsen Verlag,

the Guinness Book is published by Verlag der Rekorde and the Yellow Pages are released by Dumrath & Fassnacht. Rowohlt-Verlag, one of the most successful paperback publishers, is based in Reinbek, just outside of Hamburg. Since 2005, the gravure printing company Prinovis (Bertelsmann, Gruner + Jahr, Springer), that is active throughout Europe, has also set up its head offices by the Elbe river.

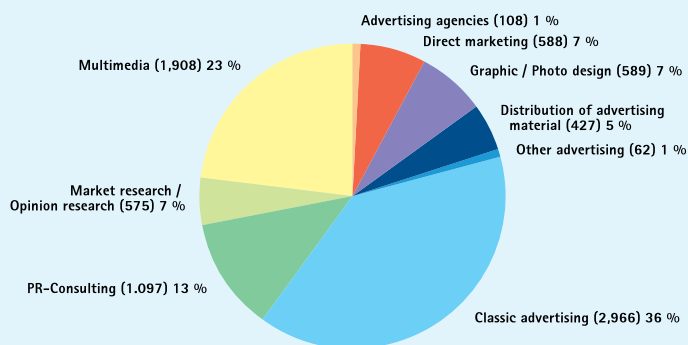
Advertising

- 8,320 companies
- 1,908 of which are active in the multimedia sector

For more than twenty years, Hamburg has been the city with the most successful advertising agencies in Germany: Jung von Matt, Springer & Jacoby and Scholz & Friends have always held top national and international rankings like at the competition of the Art Directors Club (ADC) or at the Cannes Lions International Advertising Festival.

Other Hamburg agencies keep joining the group of top creatives, among them Grabarz & Partner, kempertrautmann, Kolle Rebbe, Nordpol Hamburg and Zum Goldenen Hirschen. Apart from the much sought-after "ADC-Nägeln" and the "Cannes Lions", our agencies regularly engage in bringing awards such as the "GWA Effie", "Das Plakat" or the "Clio Award" to Hamburg.

Industry structure of 8,320 Hamburg-based advertising companies, 2nd half of 2005 (by numbers of companies)



Note: Of a total of 8,320 companies 1,870 are listed in the Commercial Register
 Source: Companies counted by Hamburg Chamber of Commerce, January 2006 © Hamburg Chamber of Commerce

Hamburg's advertising competence is also reflected in the diversified structure of the sector. Important media agencies such as pilot media and GFMO.OMD as well as important opinion research institutes such as Nielsen Media Research, Ipsos and United Research are based in Hamburg.

Hamburg's PR agencies are top performers when it comes to demonstrating creativity and quality, like recently during the presentation of the PR Report Awards 2005. Additionally, a number of leading direct marketing agencies are based in Hamburg like Proximity, which was awarded the "Deutscher Direktmarketingpreis 2005" (German Direct Marketing Prize). Over one third of all awards of the "Deutscher Dialogmarketing-Preis 2005" (German Dialogue Marketing Prize) were conferred to Hamburg-based companies.

Multimedia

- 1,908 multimedia companies

As the digital network of the media world keeps growing, Hamburg has developed into the leading German location in this important sector of media convergence. Apart from six of the top ten online promoters, AOL Germany and freenet.de, two of the three most important Internet providers, and the leading Internet search engine Google have their headquarters in Hamburg. In addition, specialised business-to-business providers like "Wer liefert was?" are also represented at the Elbe river, and the Internet supplier www.hamburg.de, Hamburg's online business card, counts among the most successful city portals in Germany.

According to the trade journal "Horizont", six out of twenty of Germany's best websites are designed by Hamburg-based companies; this comes to no surprise as Hamburg is also home base to leading and award-winning internet agencies such as SinnerSchrader, Fittkau & Maaß Consulting and Nasa 3.0.

Hamburg is also a stronghold of the fast-growing games industry: it is the second-strongest location in Germany after the federal state North Rhine-Westphalia. The diversified Hanseatic media landscape is favourable to game producers. The German versions of several of the most important computer games like "Tomb Raider" (Eidos interactive) or "RTL-ski jumping" (49 games) were developed in Hamburg. The Hamburg-based company Fish-labs ranks internationally among the top businesses in the mobile games segment. The Hamburg based publisher.dtp entertainment ranks among the most successful suppliers of adventure and children's games in the German-speaking region.

The industry network Hamburg@work offers a platform for cross-linking suppliers from the IT industry and the digital communication sector. Further information on multimedia and IT is available in our Sector Profile "Hamburg –Major IT Centre".



Film maker Fatih Akin and his leading actors Sibel Kekilli and Birol Ünel (from left) won as much as three German film prizes for Hamburg with the film "Gegen die Wand (Head on)".
 Photo: ddp/Johannes Eisele

The Film Industry

- 1,216 companies
- 1,650 granted filming permits (2004)
- 15,050 film and TV productions (2004)

"Sorry Berlin, but Hamburg is the most beautiful city in Germany." These were the words of the Hamburg producer Fatih Akin as he received the Golden Bear for his film "Gegen die Wand (Head on)" at the Berlinale 2004; he has received further awards such as the German and the European Film Prize. Films made in Hamburg, just like Akin's masterpiece, have been sponsored in an efficient and goal-oriented way for the past 25 years. "Lauras Stern", "Rosenstraße" or "Männerpension" are only some of the 1,283 titles, which have received public support since 1995. The many attractive sites make Hamburg a popular location for film and TV companies: the port, St. Pauli and the Alster also attract international productions.

Studio Hamburg GmbH is the largest German TV studio and the second-largest TV producer. The TV standard series "Großstadtrevier" was awarded with the Golden camera as "best German popular series". Spiegel TV and the talk show producer Schwartzkopff TV also rank among the top producers. Successful cinema and TV productions are released by the Hamburg production companies Polyphon and Wüste Film and under the label of the independent producer Peter Stockhaus.

Hamburg is the most important German advertising film location with a market share of 40 percent. Cobblestone, Five Three Double Ninety, Production International and Markenfilm figure among the most successful advertising film producers; Markenfilm is one of the largest producers worldwide and is based in Wedel in the direct vicinity of Hamburg. With films like "Der kleine Eisbär" and "Käpt'n Blaubär" Hamburg also has acquired a reputation as a centre for trick films. Renowned suppliers of the post production sector are based in Hamburg: the pictures sector (VCC Perfect Pictures, OPTIX DigitalPictures) and also the audio sector is represented with many outstanding sound studios (Studio Funk, Hastings Music, Konken Studios). Procon Event Engineering is the leading equipment supplier.

Furthermore, CinemaxX as one of the leading German cinema operators and Deutsche Filmversicherungsgemeinschaft (DFG), the largest German film insurer, have their head offices in Hamburg.

Radio and Television

- 84 companies
- 12 locally producing radio stations (with 7 private stations)
- 31 available radio stations (metropolitan area of Hamburg)

With Norddeutscher Rundfunk (NDR), Hamburg hosts the third largest ARD public broadcasting station. ARD has been broadcasting its daily news "Tagesschau" from Hamburg for 50 years, regional broadcastings are produced by the local studios of ZDF, RTL and SAT1. The Media Centre Rotherbaum was founded in 1995 and meanwhile has become home base of Germany's most successful local TV station, Hamburg 1. The same building accommodates the ZDF talk show "Johannes B. Kerner".



Every viewer has already seen Studio Hamburg TV productions.

Photo: Patrick Lux dpa/Ino

One of the advantages of Hamburg's infrastructure is the large number of radio programmes that can be received via cable. With 31 available radio stations, the metropolitan area of Hamburg counts among the most competitive locations in Germany. HAM –the Hamburgische Anstalt für neue Medien (Hamburgian Institution for New Media) has admitted seven private radio stations including Oldie 95, Klassik Radio, which is broadcast nationwide, and Germany's leading local radio station Radio Hamburg with a share of local listeners of about 30 percent. The market leader and second-largest private radio station Oldie 95 is serviced by the regional marketing company More, which is successful all over Germany. The European market leader in radio promotion, Radio Marketing Service (RMS), is also based in Hamburg.

In November 2004, the digital antenna television DVB-T was launched in Hamburg. Digital radio stations also started up. With digitisation, the quality of picture and sound has been considerably increased and a larger variety of programmes made available. Another project in planning is the introduction of DVB-H, the mobile phone TV.



The figurehead of Germany's most successful local TV station Hamburg 1: Herbert Schalthoff in his daily talkshow "nachgefragt".

Photo: Roland Magunia

The Music Industry

- **933 companies**

Hamburg-based companies of the music business range among the top players. Leading record labels like Warner Music Group and Europe's largest independent label edel music are located in Hamburg. A large number of music publishers like EMI Music Publishing Germany, Peermusic, Sikorski or Warner Chapel add to these.

Almost a dozen companies line up to create Hamburg's subculture vibrations. Hamburg has always been a talent factory for creative musicians: Udo Lindenberg, Fünf Sterne Deluxe, Fettes Brot, Lotto King Karl, Stefan Gwildis as well as Echo laureate Annett Louisan started their career in Hamburg. The German Rock and Pop Award is presented in Hamburg since 2000 and constitutes an important competitive event for young talents.



Hip-Hoppers from Hamburg with their own independent label: the band "Fettes Brot!"

Photo: Jan-Christoph Schultchen

Publishers and labels benefit from the short distances and a good infrastructure in the city. Karostar Musikhaus represents a new centre for music industry start-ups at St. Pauli. This is the part of town where Hamburg's musical heartbeat can be felt: Around 70 music clubs located near the Reeperbahn create a worldwide unique club scene.

Hamburg's concert operators like Karsten Jahnke Konzertdirektion or Funke Media also enjoy an international reputation. Large arenas like the Color Line Arena, AOL Arena or the Laeizhalle music hall host top quality concerts for national and international stars. Many successful event agencies operating nationwide like Vagedes + Partner, Kontrapunkt and Vion are located in Hamburg.

The Cultural Industry

- **384 companies**
- **15,000 theatre seats**
- **83 museums and collections (75 are privately owned)**

The cultural industry in Hamburg attains a much higher local value than the German average in terms of sales and number of employees in the sector. The success of the concept is underlined by tourist figures: Over ten million visitors frequented the cultural institutions, which are continually promoted by the Hamburg cultural board. Apart from the three state theatres (Hamburger Staatsoper, Deutsches Schauspielhaus and Thalia Theater), more than 30 theatres seek to attract audience with a diversified selection of plays. The Schmidt-Theater, recently extensively modernised, the Ohnsorg-Theater, or the Ernst Deutsch Theater as Germany's largest private theatre – all are institutions well-known beyond the borders of Hamburg. John Neumeier's ballet ensemble has acquired world-class standard.

Hamburg is Germany's musical capital and measures up to New York and London. More than five million visitors so far have seen Stage Entertainment's three current musicals: "König der Löwen" (Lion King), "Mamma Mia" and "Tanz der Vampire" (The fearless vampire killers). In March 2006, a new musical will be celebrating its European premiere in Hamburg: "Dirty Dancing". The former Hamburg factory Kampnagel nowadays is an established platform for independent dance and theatre groups; it further serves as a centre for contemporary performing arts.

Hamburg's museums and collections also attract many visitors, among them many privately owned institutions like the Bucerius Kunst Forum, the museum ship Cap San Diego and the Deichtorhallen with the newly opened Haus der Photographie. The planned projects in the HafenCity also promise spectacular developments: The Elbphilharmonie and the Peter Tamm International Shipping and Maritime museum are expected to attract an international audience.

Capital of Media Professions

A strong media location requires many qualified and talented young people. In line with the diverse media landscape, Hamburg has developed a competitive training and continuing education programme. Schools of journalism like the Akademie für Publizistik (Academy for Journalism) and the Henri-Nannen-School serve as talent factories for highly qualified young students. With the active support of the Hamburg Chamber of Commerce and the NDR, new professions have been created such as "audiovisual media manager" and "audiovisual media designer". Every year, more apprenticeships are created in the sector of two-tier vocational training. The study course to qualify in "Media Business Administration" offered by HKBiS – the Handelskammer Bildungsservice gGmbH (Hamburg Chamber of Commerce Education Service gGmbH) is just one of the many attractive vocational training alternatives.

Remarkable developments are also to be noted in the university sector. The Hamburg School of Business Administration (HSBA) offers a two-tier bachelor study course for "Media Management"

combining a three-year study programme with on-the-job-training; this programme therefore meets both economic and scientific requirements. In 2003, the interdisciplinary art and media campus Finkenau was founded. Here the Hamburg Media School (HMS) as public-private-partnership (PPP) has established a worldwide unique concept by training media managers (degree: master of business administration), creative film producers and journalists (degree: master of arts) under one roof. HMS endeavours to teach media competency to students, young people and citizens. The TV and radio station TIDE –succeeding the Open Channel –is also located at Finkenau. The Miami Ad School is based on the same premises and trains young talents to become advertising experts. The Henri-Nannen-School has an

international reputation for an established journalist education. The Akademie für Publizistik (Academy for Journalism) also offers a large selection of further education programmes. Texterschmiede e. V. (copywriting factory) offers special evening study courses for advertising serving as a good example of how private and private-enterprise engagement has helped to gradually close the gap in the education sector.

Animation and illustration designers may choose among various colleges and academies in order to learn their trade, one of them being the animation-school-hamburg. In 2005 a team from this school has won the international "Hamburg Animation Award" (International Young Talents Trick Film Award).

A selection of regular media events in Hamburg

- Bitfilm Festival for digital film culture
- Catch 52 Award (competition for creative, currently unpublished advertising films)
- Deutscher Rock- und Pop-Preis (Germany's oldest and largest young talents festival of all musical styles)
- Filmfest Hamburg (Hamburg Film Festival)
- Goldene Feder (media prize of Heinrich Bauer Verlag)
- Günther-Strack-Fernsehpreis (Günther-Strack-Television Award for the best young artists)
- Hamburg Animation Award (International Young Talents Trick Film Award)
- Hamburger-Abendblatt-Neujahrsempfang (Hamburger-Abendblatt-New Year's Reception; gala event with celebrities from the political, economic, cultural, media and sports sector)
- hamburger dialog (nationwide communication congress)
- Hamburger Jugendmediale (competition for video and multimedia)
- Henri-Nannen-Preis (prize for print journalists)
- Internationales KurzFilmFestival Hamburg (Hamburg International Short Film Festival)
- Jugendmedientage (largest European event for young media producers)
- LeadAwards (Germany's leading award for print- and online media)
- Marketing Services (the cross media fair)
- Mediendinner der Stadt Hamburg (meeting of the leading personalities of the media sector as well as representatives from the political, cultural and scientific sector)
- Nacht der Medien (Media Night)
- PICTA (picture agencies trade fair)
- Ramses Awards (award for the best radio spots in Germany)
- Studio Hamburg Nachwuchspreis (Young Talents Award for graduates of German film schools)
- Triennale der Photographie
- WorldMediaFestival (convention of media experts)
- ZDF Hansetreff (meeting of celebrities from the political, economic, cultural, media and sports sector)

Agenda for media events: www.hk24.de/medien-termeine.

Further information regarding the media capital Hamburg is available on the internet at: www.hk24.de/medien, like for example company counts, contact addresses of organisations, further education, corporate financing.

Further publications in this serial:

- Gateway to the World –International Trade in Hamburg
- Design Capital Hamburg
- Service location Hamburg
- Financial Centre Hamburg
- Dynamic variety –Hamburg, an Industrial Centre
- Hamburg –Transport Hub of Europe
- Commercial centre Hamburg
- Hamburg –Major IT Centre
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