

Facts and Figures 2022



Facts about ZDF

ZDF (Zweites Deutsches Fernsehen) is Germany's national public television. It is run as an independent non-profit corporation under the authority of the Länder, the sixteen states that constitute the Federal Republic of Germany.

The nationwide channel **ZDF** has been broadcasting since 1st April 1963 and remains one of the country's leading sources of information. Today, **ZDF** also operates the two thematic channels **ZDFneo** and **ZDFinfo**. In partnership with other public media, **ZDF** jointly operates the internet-only offer **funk**, the

German channels **PHOENIX** and **KiKA**, and the European channels **3sat** and **ARTE**.

The corporation has a permanent staff of 3,600 plus a similar number of freelancers. Since March 2022, **ZDF** is been headed by Director-General Norbert Himmler. He was elected by the 60-member governing body, the **ZDF Television Council**, which represents the interests of the general public. Part of its role is to establish and monitor programme standards. Responsibility for corporate guidelines and budget control lies with the 14-member **ZDF Administrative Council**.

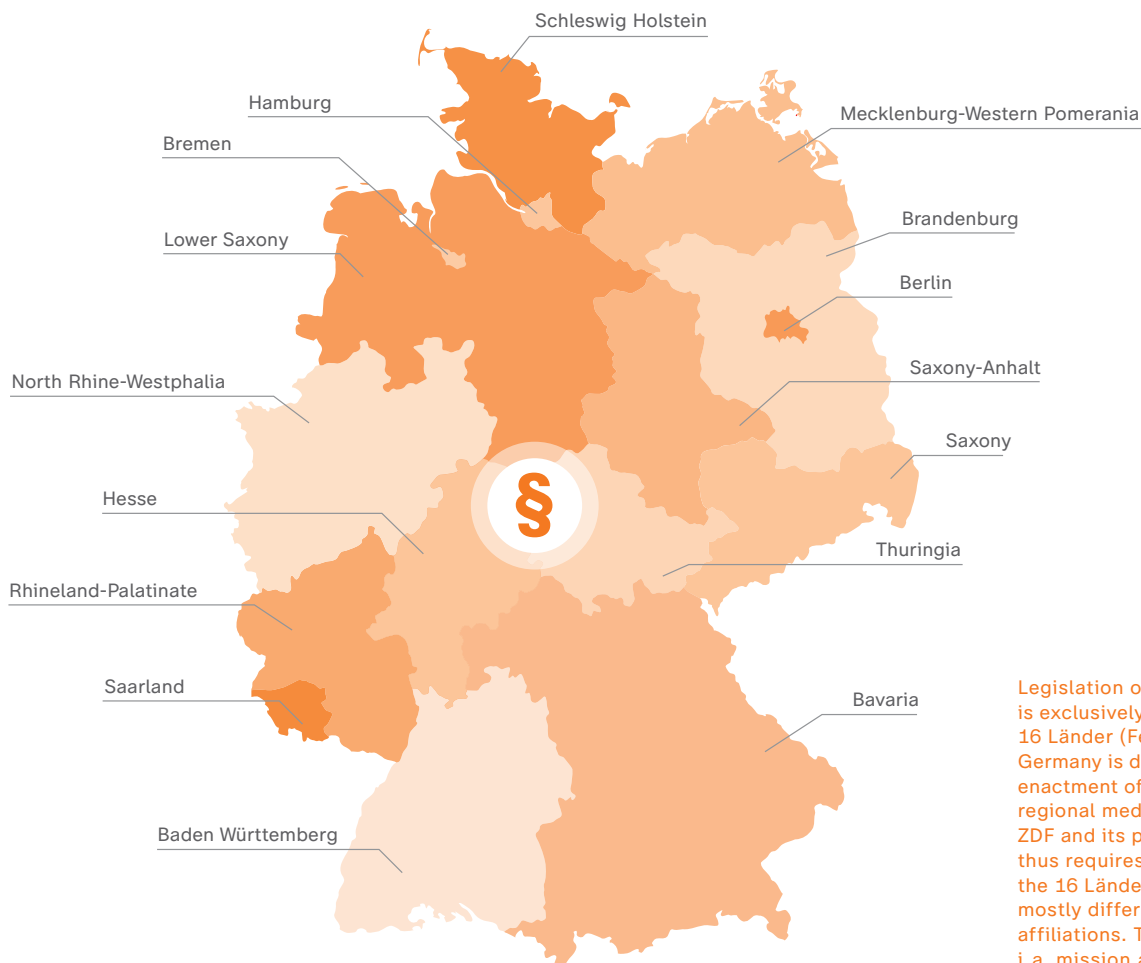
ZDF's head office in Mainz near Frankfurt on the Main with its studio complex including the digital news studio and facilities for live events.



Facts about ZDF

ZDF is based in Mainz, but also maintains permanent bureaus in the 16 Länder capitals as well as special editorial and production facilities in Berlin. For international coverage, **ZDF** has foreign correspondents operating in 19 permanent bureaus worldwide.

ZDF offers full-range generalist programming with a mix of information, education, arts, entertainment and sports. Its coverage provides both a broad view on the world and a comprehensive picture of Germany.

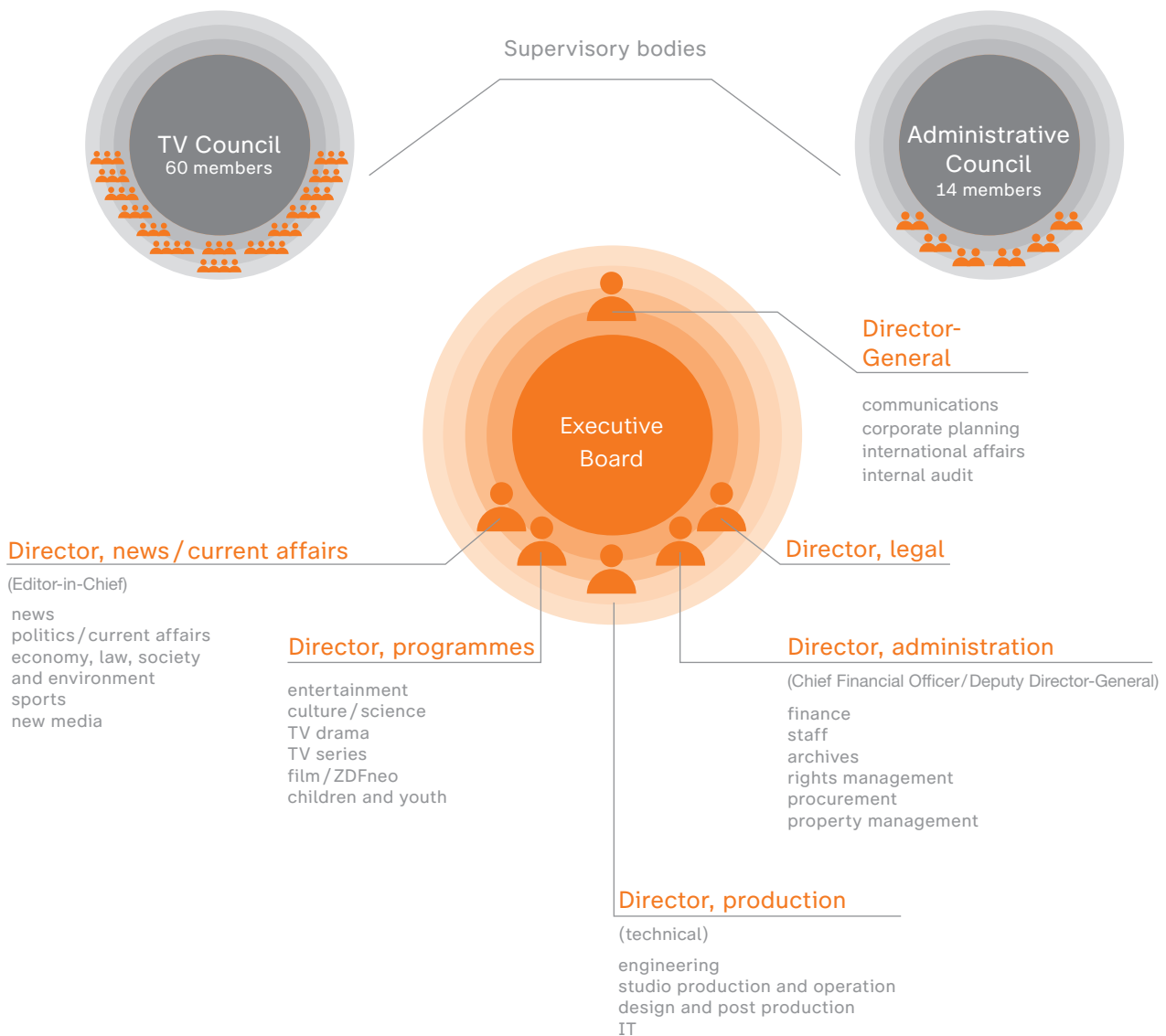


Legislation on domestic media is exclusively assigned to the 16 Länder (Federal States) that Germany is divided into. The enactment of general, supra-regional media laws governing ZDF and its private competitors thus requires the consensus of the 16 Länder parliaments of mostly different party political affiliations. These rules fixing i. a. mission and funding take the form of so-called Inter-State Treaties on media, that are periodically subject to amendments.

Facts about ZDF

In compliance with its public service remit, **ZDF** produces quality programmes for all viewers in all parts of Germany without neglecting minority interests. In this way **ZDF** strives to offer the highest possible public service value.

In line with German legislation on public service media, **ZDF** issues a bi-annual statement on programme policy, a commitment which is regularly reviewed by the independent **ZDF** Television Council.



What sort of environment does ZDF operate in?

Germany has a highly competitive television landscape. In contrast to most countries, even the most popular channels achieve only modest audience shares (see table below). On the one hand, there are **ZDF** and **ARD**, the two public service media networks. On the other hand, commercial television is dominated by two media groups: ProSiebenSat.1 Media AG and RTL Group (majority shareholder: Bertelsmann).

They own a large part of the country's commercial channels, both big and small, and share between them most of the TV advertising market – the biggest in Europe with annual revenues exceeding four billion euros. The German pay-TV market is still relatively small: The two leading platform operators (Sky and Deutsche Telekom) together have less than eight million subscribers.

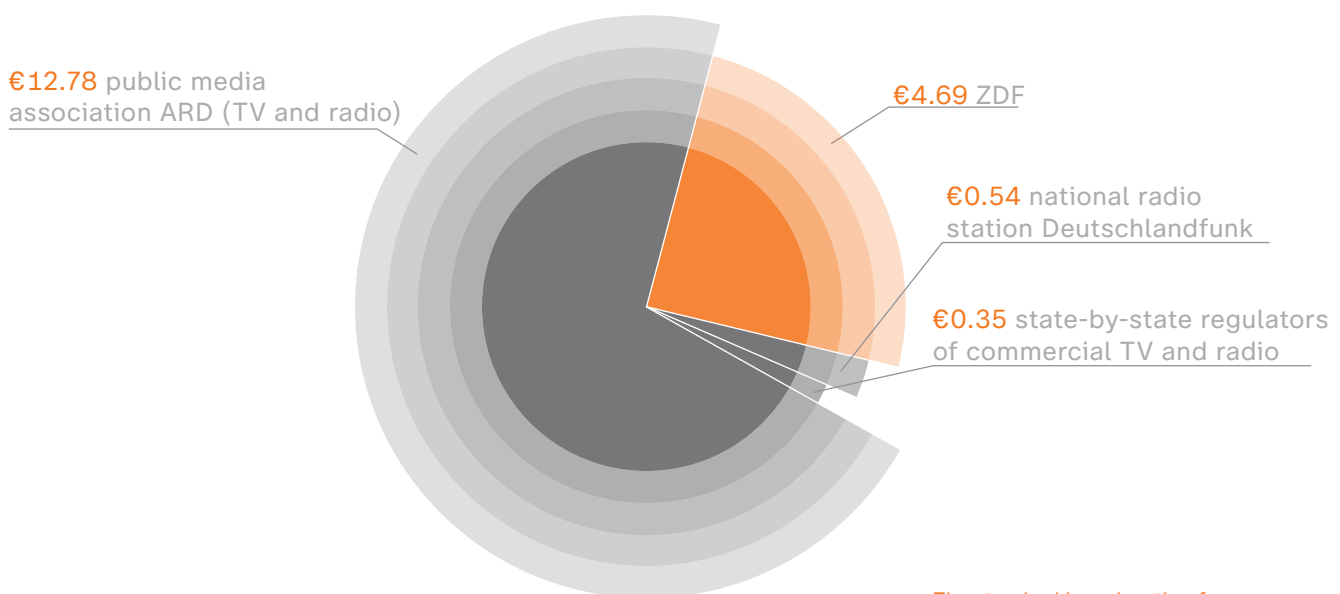
Audience shares
(Free TV in Germany, in %)

	2019	2020	2021
ZDF	13.0	13.6	14.7
ZDFneo	3.1	2.9	2.8
ZDFinfo	1.5	1.5	1.7
partner channels (3sat/ARTE/KiKA/PHOENIX)	4.3	4.4	4.3
ARD ('Das Erste')	11.3	11.3	12.1
7 regional ARD channels	13.1	13.7	13.7
RTL	8.4	8.1	7.2
Sat1	6.0	5.7	5.2
Vox	4.8	4.6	4.5
Pro Sieben	4.3	4.0	3.7
Kabel 1	3.6	3.5	3.2
RTL 2	2.9	2.7	2.5
other channels	23.7	23.9	24.3

How is ZDF financed?

Public service media in Germany are mainly financed by broadcasting fees, payable by private households as well as businesses and public institutions. Payments are collected by an agency specifically set up for this purpose by the public service media. Since January 2013, the broadcasting fee (Rundfunkbeitrag) is generally levied on places of residence and work. It is no longer linked to individual units of media reception equipment installed at these places. The specifics of who has to pay how much are defined in the federal states' Inter-State Treaties on media that also regulate the process of revenue allocation to **ZDF**:

An independent panel of experts (KEF) periodically examines the public media financial needs and recommends an appropriate fee level. The 16 Länder parliaments then set the fee for a period of usually four years. The income is shared between **ZDF**, the regional member stations of the public media association ARD and the national radio station Deutschlandradio. From the standard annual broadcasting fee of 220.32 euros as paid by most households (18.36 euros per month since August 2021), **ZDF** receives a share of 56.28 euros.



The standard broadcasting fee tariff for individuals in 2022 is **€18.36** per month. Business owners' tariffs are progressively determined according to the number of employees.

How is ZDF financed?

Advertising and sponsorship are additional sources of funding. However, special advertising regulations apply to ZDF as a public television: Commercials are legally restricted to a maximum of twenty minutes per day from Monday to Saturday, and cannot be broadcast after 8 pm

or on Sundays and public holidays. In comparison, advertising rules are more liberal for our commercial competitors: They are permitted to fill up to twenty per cent of each programme hour with advertising, which can add up to more than four hours per day.

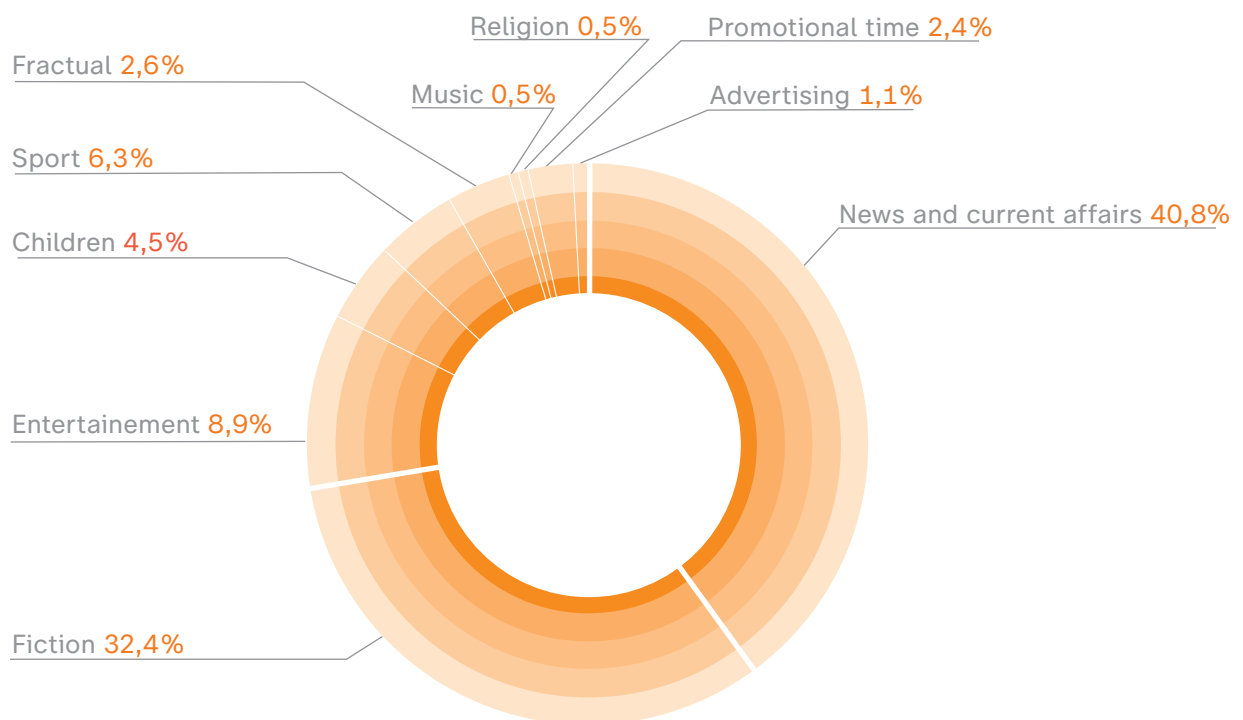
ZDF Operating Budget income in million euro

	2018	2019	2020	2021	2022 (provisional)
Broadcasting fees	1,903	1,918	1,928	2,022	2,027
Advertising and sponsorship	192	173	172	182	182
Other revenues	132	139	130	194	185
Total	2,227	2,230	2,230	2,398	2,395

ZDF programming: diversity as a core public service

ZDF broadcasts a broad range of programmes, from news, politics and current affairs to arts and science magazines, from music and movies to entertainment shows. Compared to other generalist channels in Germany, ZDF has the highest proportion of reporting on social, political and economic affairs as well as on arts and culture. In various genres, including documentaries,

art reviews and science programmes, German TV film productions or entertainment shows, ZDF has been setting standards and regularly receives the highest quality ratings in audience surveys. ZDF's sports reporting and children's programming are also strong brands. The numerous German and international awards testify to ZDF's commitment to quality content.



ZDF main channel, figures for 2021
(in % of total airtime)

ZDF thematic channels and funk

In addition to its main channel of the same name, **ZDF** operates two thematic channels. They were first launched on digital satellite in 1997 and have since become increasingly prominent as more and more viewers have gained access to digital television. Following major changes

in the respective channel profiles between 2009 and 2012, they have become promising assets in our corporate strategy and in audience response. Most recently, **ARD** and **ZDF** have set up their non-linear service **funk**.



ZDFneo is the more successful of the two. The channel's schedule includes mainly German and international TV series (both reruns and original broadcasts) but also feature films, as well as some of the best and most innovative **ZDF** documentaries, comedy and talk shows. Like its thematic sister channel, **ZDFneo** has a much younger average audience than the main **ZDF** channel.



ZDFinfo has the latest **heute** newscasts throughout the day and presents a wide range of factual programmes in the fields of politics, global and European affairs, current history, social issues, economics and consumer advice. Many of its programmes offer interactive viewer participation, stimulate the debating of political issues and integrate information across different media.



Since October 1st, 2016, **ARD** and **ZDF** jointly have provided their younger audiences according to their viewing habits with programmes exclusively available on the internet via YouTube, Facebook, Snapchat, Instagram and similar services or on the dedicated site **funk.net** and its own app. The content network, which is not confined to a linear TV channel, is designed to inform, orientate and entertain the 14- to 29-year-olds with innovative programmes such as internationally appreciated series and over 40 other online formats. Open to users' comments and suggestions, **funk**'s offers will be continually enhanced.

ZDF programmes are complimented by dedicated websites: **heute.de** is the up-to-the-minute **ZDF** news service; **ZDF.de** offers live streams and on demand programmes available at no extra charge; **tivi.de** is the **ZDF** website for children, **zdf.kultur** bundles arts and culture content. There is also a website in English for basic corporate information about **ZDF** at **zdf.com**, while much greater detail is available in German at **unternehmen.zdf.de**. Customised apps facilitate mobile access to **ZDF** content.

ZDF partner channels: cooperation with other public media

KiKA is the joint children's channel of **ZDF** and **ARD**, offering quality programmes for the youngest viewers that are free of violence or advertising. Another **ZDF-ARD** project is **PHOENIX**, the public affairs and documentary channel. It specialises in in-depth analysis and live coverage of political debates and public events. **ZDF** and **ARD** also share responsibilities for the three national public radio stations run by **Deutschlandradio**: Deutschlandfunk, Deutschlandfunk Kultur and Deutschlandfunk Nova. The European cultural channel **ARTE** is a German-French cooperation with international partners. Its

programmes are broadcast in several languages and watched all over Europe. **3sat** is a European satellite television project that brings together the German-language public media of Germany, Switzerland and Austria. With the channel's operational centre based at **ZDF** in Mainz, **3sat** has a strong focus on arts and cultural programming. Several regular **ZDF** programmes are rebroadcast each week on **DW-TV**, the worldwide channel of Germany's public international media, Deutsche Welle.

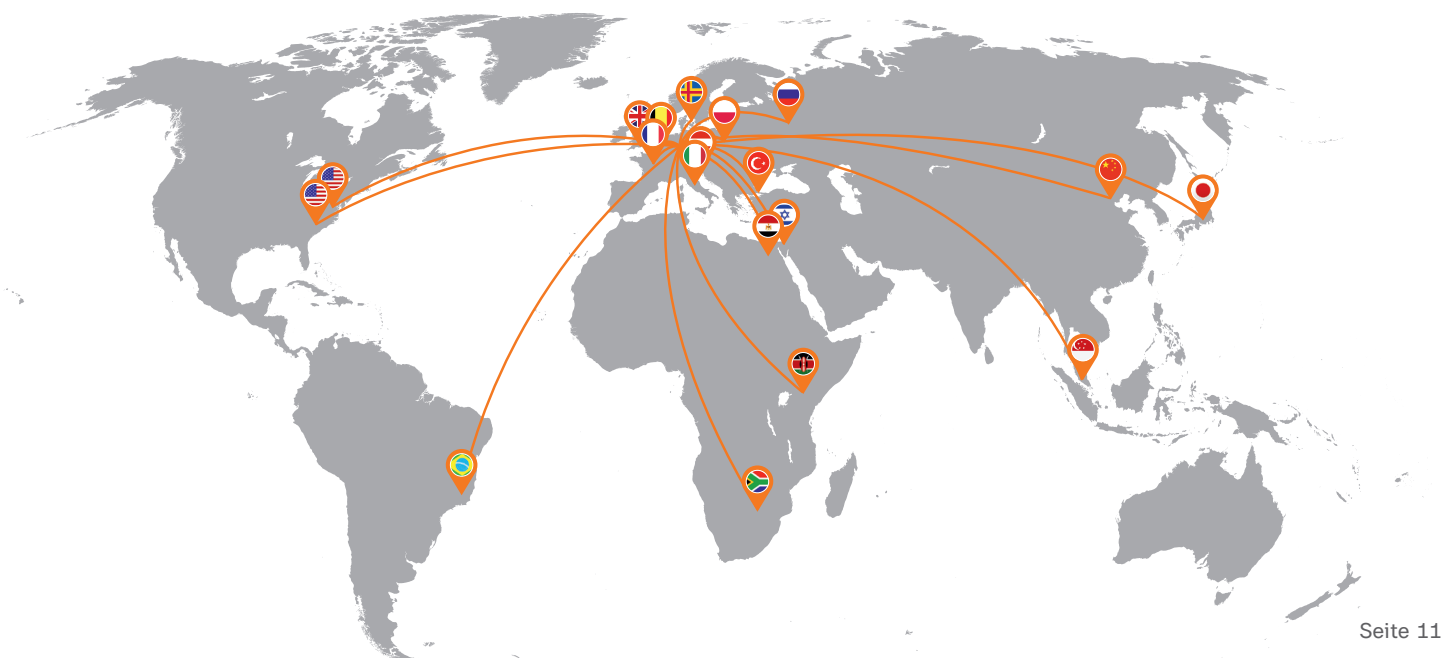


ZDF international relations: strong links around the world

On the global level, ZDF cooperates with partners on every continent. The coverage of international events by ZDF reporters and foreign correspondents benefits from agreements with other major TV corporations. Furthermore, membership of the European Broadcasting Union (EBU) is important to ZDF for co-productions, news and programme exchange, broadcast rights acquisitions, new technologies and media political initiatives. ZDF also maintains close ties with other regional media unions and international organisations and is active in media support programmes to assist public media in developing countries. ZDF interests in the field of

media policy at the European level are looked after by a permanent representation in Brussels. All of these activities are coordinated by the ZDF International Affairs department, which also serves as the first contact point for requests and approaches to ZDF from outside Germany.

Worldwide programme distribution and acquisitions, international co-productions, online rights marketing, merchandising of ZDF programme brands, sales of ZDF archive footage and other commercial activities are all managed by ZDF Studios GmbH (formerly ZDF Enterprises)



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