



Association of independent music companies and
artists (VUT)

Act United – Stay Independent

International Global Marketplace Overview – Germany – October 2022

by Jörg Heidemann, CEO of VUT (German association of independent musicians and music companies)



About me:

I am CEO of Germany's Association of Independent music companies (VUT), which represents around 1.200 Germany independent music companies. Before graduating with a degree (Diplom) in psychology at the University of Trier, I have already been working in a couple of record stores to finance my study. I was Head of Direct Export for Universal Music Germany and Export manager for one of the biggest German Independent Distributors EFA Medien GMBH as well as subsequently co-owner and CEO of the distribution company MDM -Mutualism: distribution & more. After company insolvency I have started as a freelance project manager at VUT in 2010 and took over the management in 2014. Among others I am part of the advisory board of the German Jazz Prize and the Musicboard Berlin. I am also a member of the German IFPI charts and marketing committee, of the Impala Management Board and a WIN Director. I have always been a passionate music listener and collector.

And I dance Lindy Hop



Who we are

- Founded in 1993
 - Approx. 1.300 members (labels, publishers, distributors, producers and artists)
 - 35 % market share
 - 80 % of all new releases
- Our aim is to help all our members enter the music market and to ensure fair competition for everyone, big or small



Our members

Main business activity:

- 56 % labels
- 9 % artists
- 9 % publishers

Secondary business activity:

- 46 % publishers
- 38 % labels
- 34 % distributors

Number of employees:

- 47 % : 1 - 2 employees
- 43 % : 3 - 10 employees
- 10 % : > 10 employees



Quick Facts about Germany 1

Germany is a western-central European country bordered by Poland, Denmark, the Czech Republic, Austria, France, Switzerland, Luxembourg, Belgium, and the Netherlands.

Germany is the most populous country in the European Union with an estimated 2021 population of 83.24 million, which ranks 17th in the world.



Quick Facts about Germany 2

Germany is divided into 16 states, referred to collectively as Länder, and each state has its own constitution and remains fairly autonomous. Each state also has its own capital.

Despite its large population, Germany has relatively few large cities, and only four have a population over 1 million: Berlin, Hamburg, Munich and Cologne.



Quick Facts about Germany 3

Here's a full list of the ten largest cities in Germany.

Rank	City	Population
1	Berlin	3,439,100
2	Hamburg	1,769,117
3	Munich	1,330,440
4	Cologne	1,086
5	Frankfurt am Main	671,927
6	Stuttgart	600,068
7	Düsseldorf	586,217
8	Dortmund	581,308
9	Essen	576,259
10	Bremen	547,685

Germany is home to a large number of smaller cities and towns, however, and in total there are currently 82 cities with a population of more than 100,000 people.



Quick Facts about Germany 4

GDP Per Capita: \$ 42526.55 USD

<https://de.tradingeconomics.com/germany/indicators>

Internet Penetration: 78.81 million (94%) (2021)*

Mobile Subscriptions: 107,5 M in 2021*

Smart Phone Users: 62.6 M in 2021*

*statista.de



Quick Facts about Germany 5

Social Media Platforms Ranked By Popularity Top 5 (Monthly Users)

1. Whats App 87%
2. YouTube 69%
3. Facebook 63%
4. Instagram 41%
5. Pinterest 26%

Source: <https://www.statista.com/statistics/867539/top-active-social-media-platforms-in-germany/>



Quick Facts about Germany 6

Most Influential Music Blogs Top 6

1. Laut.de
2. Musikblog.de
3. Testspiel.de
4. Nothing But Hope And Passion
5. Kaput-Mag
6. Diffus

Source: VUT internal label group



Quick Facts about Germany 7

TOP 5 Music Trading Turnover:

1. Amazon
2. iTunes
3. Media Markt
4. Saturn
5. Spotify

Still existing active classic record stores : around 150



Quick Facts about Germany 8

Local Music Publications

Musikwoche www.musikwoche.de



Quick Facts about Germany 9

LOCAL PROMOTERS & BOOKING AGENTS GERMAN BOOKING AGENCIES

A.S.S. CONCERTS & PROMOTION (Hamburg)

Rock, Singer/Songwriter, Pop,
Metal (Dragon Productions)

www.assconcerts.com

FKP SCORPIO (Hamburg)

Rock, Pop, Singer/Songwriter

www.fkpstudio.com



Quick Facts about Germany 9

GASTSPIEL REISEN RODENBERG (Berlin)

Indie-Pop, Electro-Pop, Singer/Songwriter

www.gastspielreisen.com

GRAND HOTEL VAN CLEEF (Hamburg)

Rock, Alternative, Singer/Songwriter, Indie-Pop

www.ghvc.de

KARSTEN JAHNKE KONZERT DIREKTION

(Hamburg)

Jazz, Singer/Songwriter, Rock, Pop, Alternative

www.kj.de

LANDSTREICHER BOOKING (Berlin)

Hip Hop, Rock, Singer/Songwriter

www.landstreicher-booking.de



VERBAND UNABHÄNGIGER MUSIKUNTERNEHMEN E.V.

ACT UNITED - STAY INDEPENDENT

Quick Facts about Germany 9

MAREK LIEBERBERG KONZERT AGENTUR (Frankfurt am Main)

Rock, Pop, Singer/Songwriter

www.mlk.com

MELT! BOOKING (Berlin)

Indie-Pop, Electro-Pop, Singer/Songwriter

www.meltbooking.de

SASOMO BOOKINGS (Berlin)

Techno, House, Electronic Music

www.sasomobookings.com



Quick Facts about Germany 9

SOLAR PENGUIN AGENCY (Frankfurt am Main)

Rock, Folk, Death Metal, Pop

www.solarpenguin.de

TARGET CONCERTS (Munich)

Indie-Pop, Electro-Pop, Singer/Songwriter, Rock,
Progressive

www.target-concerts.de

Source: www.berlin-music-commission.de/?file=leitfaden_deutscher_musikmarkt.pdf



Quick Facts about Germany 9

The number of German booking agencies that operate globally is limited. It is important here to differentiate between agencies that send successful, current acts on tour and those that invest in developing international newcomers. In order to contact booking agencies in Germany, it's advisable to perform at a showcasing event, at select business events (e.g. Reeperbahn).

German booking agents searching for new music acts are generally represented at these important international showcasing events.

Additionally, there will be agents from a range of different agencies, ranging from smaller 'music aficionado agencies' to larger agencies and festivals present. Small agencies are usually flexible and well organised throughout Germany. In particular, there are many excellent venues in university towns and more rural areas, that smaller agencies represent. In Germany, the general public and music fans are very interested in live music events.



Quick Facts about Germany 9

It's not uncommon for the road to lead from live clubs in rural areas to large festival stages. Both the equipment in venues, as well as the concert support offered by local organisers, is generally excellent.

More than a few artists find that the conditions (lighting, sound, and local support) for their tours in Germany is amongst the best in the world.

Every party should clearly define goals and expectations for a tour and performances in each agreement from the beginning of the first contact. Because of the distance, one should also not underestimate the time and financial commitment that tour activities for foreign artists have.

Thus, every aspect should be discussed in as much detail as possible. This works optimally in conjunction with the cooperating network label (release), promoter, publisher, and booking agency. In some cases, it is possible to lay an initial foundation for later publications and cooperation in Germany with targeted live activities.



Quick Facts about Germany 9

However, this depends on the interest level of participating artists and partners. But even Germany is no surefire success and national and international competition is certainly strong.

What rules the stage somewhere else doesn't necessarily translate to Germany and vice versa.

The other thing to keep in mind is the differing mentalities of the public in different regions. One can say that, on the whole, the German public is appreciated for being very open and warm.

But the paths to the public's 'fever pitch' is often different in northern Germany than in its southern German counterpart.



Quick Facts about Germany 10

Showcase Festival

Reeperbahn Festival in Hamburg

Co Pop in Cologne (better for newcomer!)

ROCK-POP (MAJOR) FESTIVALS

ROCK IM PARK

www.rock-im-park.com, Nuernberg – June

ROCK AM RING

www.rock-am-ring.com

Flugplatz Mendig/Vulkaneifel – June

SOUTHSIDE FESTIVAL

www.southside.de, Neuhausen ob Eck – July

LOLLAPALOOZA FESTIVAL

www.lollapaloozade.com, Berlin – August



Quick Facts about Germany 10

METAL FESTIVALS

WACKEN FESTIVAL

www.wacken.com, Wacken – July/August

WITH FULL FORCE

www.withfullforce.de, Flugplatz Roitzschjora –
June/July

JAZZ FESTIVALS

MUSIKFEST HAMBURG

www.musikfest-hamburg.de , Hamburg – April/
May

ELBJAZZ FESTIVAL DRESDEN

www.elbjazz.de, Dresden – May

ÜBERJAZZ FESTIVAL HAMBURG

www.ueberjazz.com, Hamburg – October



Quick Facts about Germany 10

XJAZZ Festival, Berlin

www.xjazz.net, Berlin – May

TECHNO/ELECTRO FESTIVALS

MAYDAY DORTMUND

www.nature-one.de/events/mayday/2016

Dortmund – April/May

BERLIN SUMMER RAVE

www.berlin-summer-rave.de, Berlin – May/June

NATURE ONE

www.nature-one.de, Kastellaun/Hunsrück – August

TIME WARP MANNHEIM

www.time-warp.de, Mannheim – April

FUSION FESTIVAL

www.fusion-festival.de, Flugplatz Lärz – June



Quick Facts about Germany 10

GOTHIC/DARK WAVE FESTIVALS

WAVE GOTIK TREFFEN

www.wave-gotik-treffen.de, Leipzig – June

HIP-HOP FESTIVALS

SUMMER JAM FESTIVAL

www.summerjam.de, Cologne – July

SPLASH FESTIVAL

www.splash-festival.de, Ferropolis – July

POP FESTIVALS

Pop-Kultur

www.pop-kultur.berlin, Berlin – August



Quick Facts about Germany 10

WORLD MUSIC FESTIVAL

Fête de la Musique Berlin

www.fetedelamusique.de, Berlin, June 21st

REGGAE / SKA / ROCK FESTIVALS

THIS IS SKA ROSLAU

www.this-is-ska.de, Roslau – July

FREEDOM SOUNDS FESTIVAL COLOGNE

www.freedomsoundsfestival.de, Cologne – April

CHIEMSEE SUMMER

www.chiemsee-summer.de, übersee/Chiemsee
– August



Quick Facts about Germany 10

INDIE-POP/ROCK FESTIVALS

HURRICANE FESTIVAL

www.hurricane.de, Eichenring, Scheeßel – June

MELT FESTIVAL

www.meltfestival.de, Ferropolis – July

HALDERN POP

www.haldernpop.com, Rees-Haldern – August



Quick Facts about Germany 10

CLASSIC FESTIVALS

RHEINGAU MUSIK FESTIVAL

www.rheingau-musik-festival.de

Rheingau – June-December

CLASSIC OPEN AIR BERLIN

www.classicopenair.de, Berlin – July

KLASSIK OPEN AIR NÜRNBERG

www.klassikopenair.de, Nürnberg – July-August



Quick Facts about Germany 11

RADIO STATIONS

1 LIVE

www.einslive.de

Target group: 16 – 30 year olds

Rock, Pop, Indie, Singers/Songwriters

DEUTSCHLANDRADIO KULTUR

www.deutschlandradiokultur.de

Target group: 35 – 60 year olds

Jazz, Folk, Rock, Singers/Songwriters, Classical

FLUX FM

www.fluxfm.de

Target group: 16 – 50 year olds

Alternative, Indie Rock, Indie Pop, Elektro



Quick Facts about Germany 11

RADIO STATIONS

FUNKHAUS EUROPA

www.funkhauseuropa.de

Target group: 30 – 60 year olds

World, Global Pop

RADIO EINS

www.radioeins.de

Target group: 25 – 60 year olds

Rock, Pop, Indie, Singers/Songwriters

RADIO FRITZ

www.fritz.de

Target group: 14 – 30 year olds

Rock, Pop, Indie, Singers/Songwriters



Quick Facts about Germany 11

RADIO STATIONS

RADIO JUMP

www.jumpradio.de

Target group: 20 – 50 year olds

Pop, Charts

RADIO PULS

www.br-puls.radio.de

Target group: 14 – 30 year olds

Rock, Pop, Indie, Singers/Songwriters

SPUTNIK

www.sputnik.de

Target group: 14 – 30 year olds

Rock, Pop, Hip Hop



Quick Facts about Germany 11

SWR 3

www.swr3.de

Target group: 14 – 50 year olds

Rock, Pop, Indie, Singers/Songwriters

YOU FM

www.you-fm.de

Target group: 14 – 30 year olds

Rock, Pop

source: www.berlin-music-commission.de/?file=leitfaden_deutscher_musikmarkt.pdf



Quick Facts about Germany 12

MUSIC TELEVISION PROGRAMMES

CHANGING MUSIC TV

Virtually all households in Germany own at least one television. Television is the number one form of media and public opinion barometer. In recent years, the number of innovative music formats in television has been slashed, with few exceptions. In some cases, the cultural and show formats of public stations have occasionally extended newcomers a chance to perform. The music channel MTV (Germany) is now encrypted and barely plays music. In the 1990s, the channel shaped a new aesthetic of music consumption. Today, it has become marginal.



Quick Facts about Germany 12

MUSIC TELEVISION PROGRAMMES

CHANGING MUSIC TV

Most music clips in Germany are viewed online. Viewing habits vary between mobile devices, computers, and so-called Smart TV. Online service providers such as Ampya and Myvideo are trying to establish themselves as creative tools in the domestic market. The goal is to establish themselves as equal alternatives to typical TV stations and then gain access to people's living rooms. Popularity drives the majority of music formats of private and public television channels. Endless casting shows enjoy varying popularity, but the shows do not produce any stars or any real known names.



Quick Facts about Germany 12

MUSIC TELEVISION PROGRAMMES

The TV shows 'Voice of Germany' (private channel Pro7) and 'Sing meinen Song' (private channel VOX) have established themselves as the exceptions. These shows have gained popularity through qualitatively high music performances and commentators, though primarily act as a marketing instrument for already established artists in Germany.

Source: www.berlin-music-commission.de/?file=leitfaden_deutscher_musikmarkt.pdf



Summary

The country is the largest in central Europe and is made up of 16 Bundeslander (states), each with a very distinct and individual culture and heritage. As a consequence, the media landscape is fragmented and decentralised.

It is the largest economy in Europe, the 3rd biggest importer and the 3rd biggest export country in the world.

Germany is known for its inventions and technological developments, with some of the more famous being the light bulb, the automated calculator and the automobile.

Higher education is also free for locals and internationals, so the percentage of the population with a degree is very high.

Internet and mobile phone penetration is also amongst the highest in the world.

Germany is the 3rd largest recorded music market globally, following the US and Japan.

It has a longstanding tradition of a very strong physical market, which has become more normalized to European standards in the last two years.

The independent sector represents about 35% of the recorded music revenue.

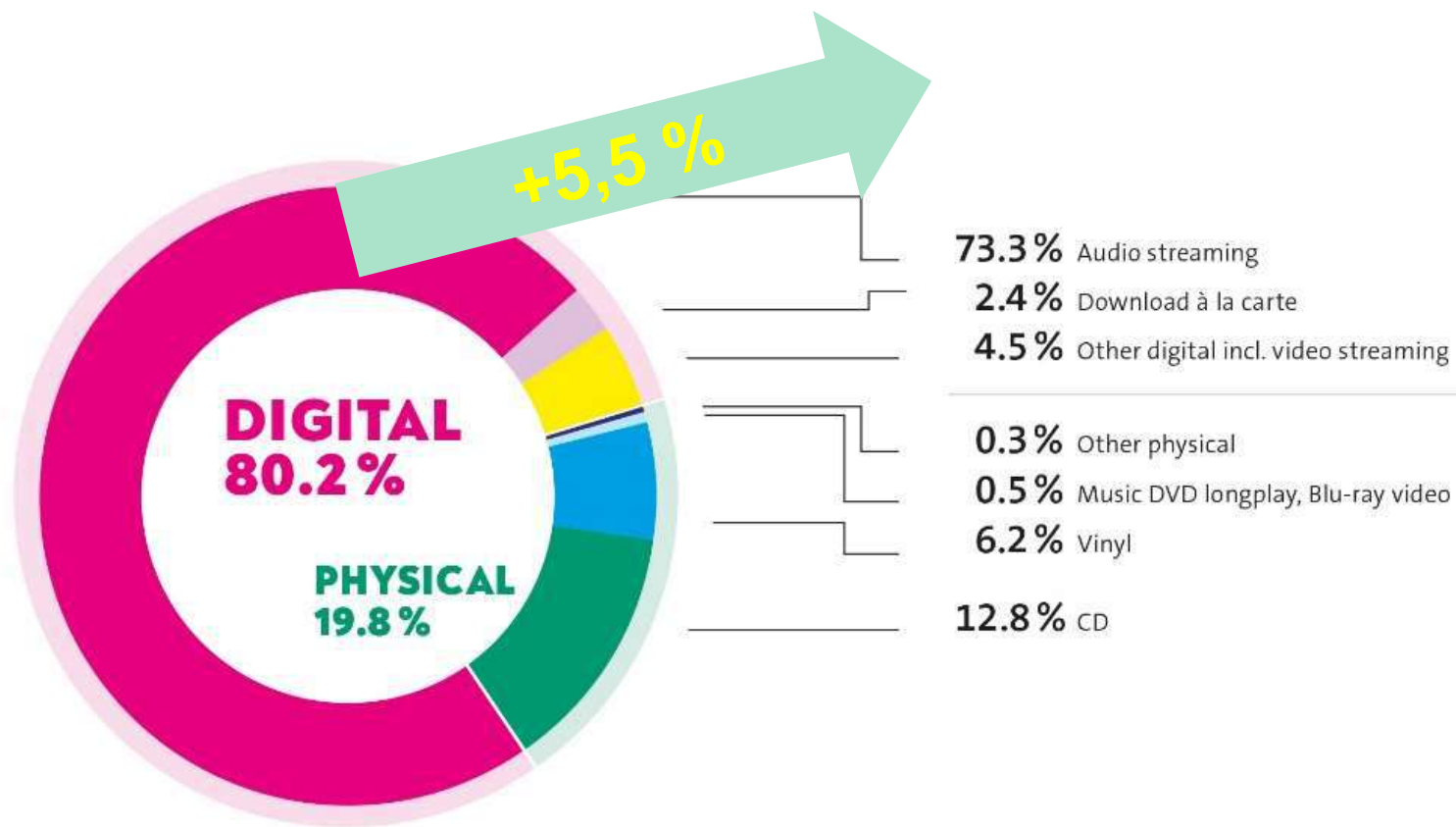
It is important to note that Germany is a market with very strong local repertoire. Of the top 15 selling albums of 2019, 14 were German speaking



The german music market in 2022...



BVMI-Halbjahresreport: Musikmarkt 2022



Total turnover*: € 967 m

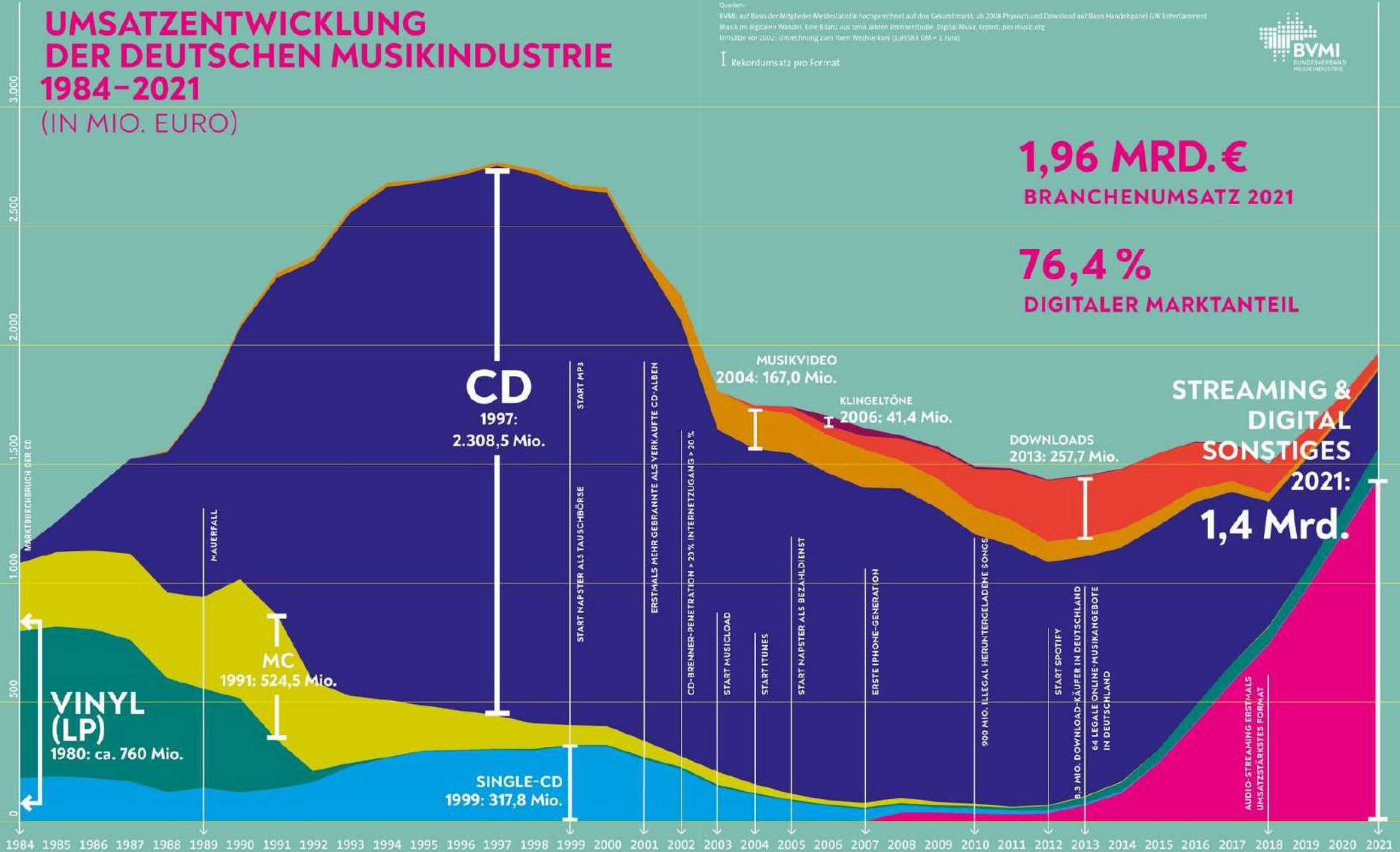
UMSATZENTWICKLUNG DER DEUTSCHEN MUSIKINDUSTRIE 1984-2021

(IN MIO. EURO)

Quellen:
BVMi, auf Basis der Mitglieder-Mindeststatistik nachgerechnet auf den Gesamtmarkt, ab 2008 Physical und Download auf Basis Handkapsel GfK Entertainment
Musik im digitalen Wandel, eine Bilanz aus zehn Jahren Brennerstudie - Digital Music Report, pio-music.org
Umsätze vor 2002: Umrechnung zum fiktiven Wechselkurs (1995/85 DM = 1 Euro)



┆ Rekordumsatz pro Format

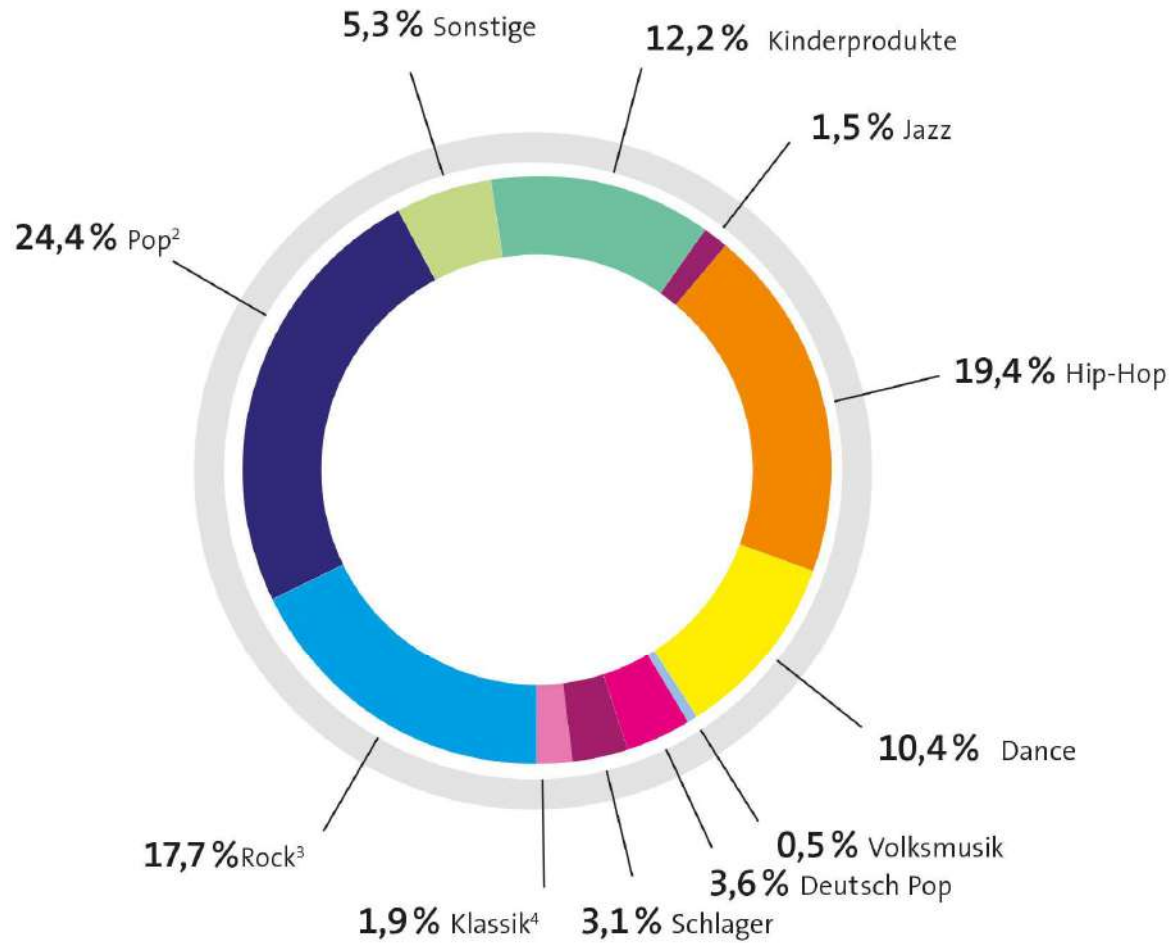




The Repertoire by Genre....



MARKET SHARES BY GENRE 2021





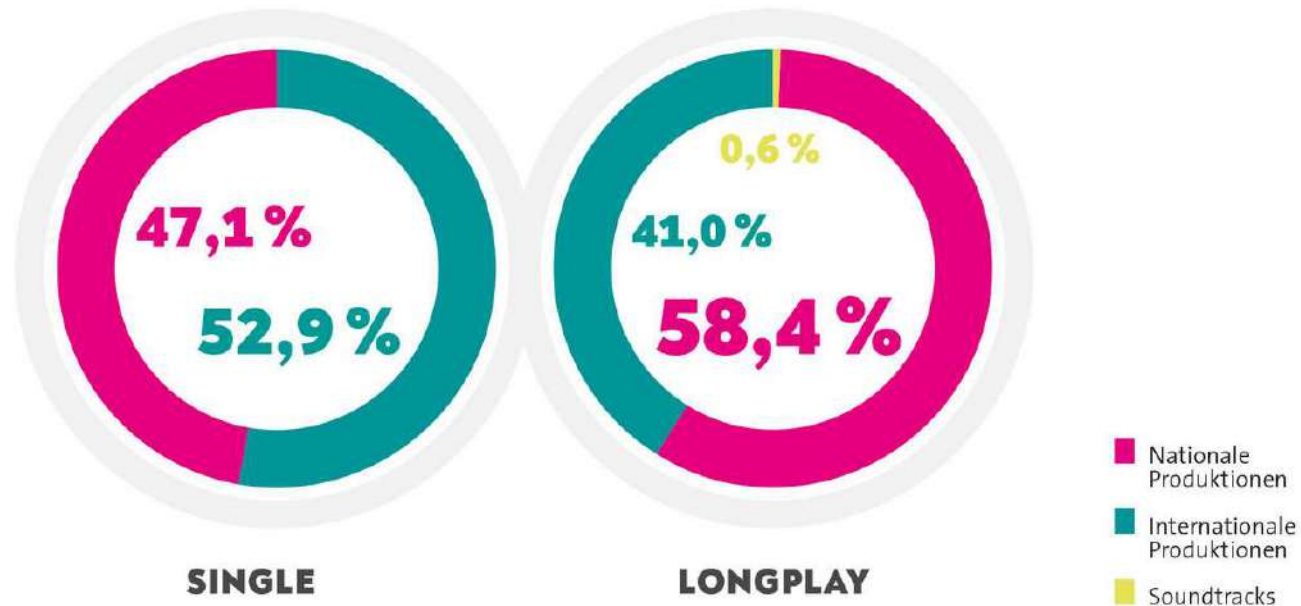
National vs International ...



Abb. 24 //

Anteile nationaler und internationaler Produktionen

an den Top 100 Single- und Longplay-Charts 2021



Quelle: GfK Entertainment; Offizielle Deutsche Charts



The collecting societies GEMA and GVL

... are institutions which collectively hold copyrights or related rights in trust for a large number of authors or holders of related rights for joint exploitation.

Solidarity communities of authors and performers

Control correct procedures for reporting and revenues from the use of works on radio, TV, the Internet and on stage

GVL www.gvl.de

GEMA www.gema.de





GEMA : Society for musical performing and mechanical reproduction rights

Composers and lyricists as authors of musical works as well as music publishers have joined forces in the GEMA.

As a collecting society, GEMA represents the claims of its members for royalties worldwide when their copyrighted musical works are used.

70,000 GEMA members, almost two million rights owners from all over the world, whom GEMA represents on the basis of representation agreements with collecting societies from other countries.





They manage the so-called secondary exploitation rights on behalf of their members and collect the resulting statutory remuneration in order to pass it on to the artists, producers and event organisers. While secondary exploitation rights are collectively managed by GVL on behalf of its members, the primary exploitation is characterised by individual contractual provisions between the rights owners and the rights users.

The German Patent and Trademark Office (DPMA), which in turn is under the control of the Federal Ministry of Justice, is the supervisory authority for all collective management organisations in Germany - including GVL. Representatives of the DPMA take part in Board meetings, associate meetings and members' meetings. The constant communication exchange between DPMA and GVL illustrates the constructive and critical supervision by the DPMA. They the fees they collect on a fiduciary basis e.g. from radio and TV stations and for the public performance (e.g. in restaurants or cafés) to their members each year in the form of a remuneration. More than 150,000 performers and 12,000 producers worldwide

Associates of GVL are the Deutsche Orchestervereinigung e.V. (German Orchestra Association, short: DOV), Bundesverband Musikindustrie e.V. (Federal Association of the Music Industry, short: BVMI), Bundesverband Schauspiel e.V. (Federal Acting Association, short: BFFS) and the Verband unabhängiger Musikunternehmer*innen (Association of Independent Musicians and Music Companies, short: VUT).



		
1. Berechtigengruppen	1. Musikinterpreten/ ausübende Künstler 2. Tonträgerhersteller 3. Veranstalter 4. Videoclipproduzenten	Musikautoren (Komponisten, Textdichter, Musikverleger)
2. Rechtliche Grundlage	Leistungsschutzrechte	Urheberrecht
3. Rechtsform	Kapitalgesellschaft/GmbH	Verein
4. Rechtswahrnehmung	Zweitverwertung	Erstverwertung
5. Medien	Audio/Musik + Film/AV	Audio/Musik



Corona Times....



In volume 37 ("Asterix in Italy") there are really scenes in which the spectators of a chariot race shout "Coronavirus! The comic was published in October 2017.

Corona shouts were dedicated to a nasty charioteer who is known throughout history - but only in the English and French editions - as "Coronavirus", and who makes life difficult for Asterix and Obelix.



Coronavirus & Music Industry in Germany (1)

The "Forum Musikwirtschaft" sees itself as a forum of leading German music associations with the goal of shaping and optimizing the economic and legal framework for all areas of the music industry.

Timeline:

"Nauen Circle" is formed (March 2019)

VUT press release "Consequences of the coronavirus affect the entire music industry" (March 13, 2020)

Weekly "Nauen Circle" meetings (from March 23rd on)

Joint notification of damage "Report of the associations of the German music industry on the economic impact of the Corona pandemic" (March 25th)

Press release "VUT and BVMI call for consideration of the music industry in additional Corona aid programme for medium-sized companies" (April 7th)

Regular meetings of Culture and Creative Industries associations with and without Federal Ministry for Economic Affairs and Energy (from April 8th on)



Coronavirus & Music Industry in Germany (2)

Joint survey (April 9th)

Joint request for aid programme "Music industry demands a quick aid program" (Mai 9th)

Joint meeting with German Culture Council (May 13th)

Joint meetings with German Music Council (from May 20th on)

"Open letter of the German Music Council for the music industry" (May 27th)

Joint press release "The music industry on the federal government's economic stimulus package" (Juni 9th)

Associations launch the Music Industry Forum

In the Corona crisis, numerous associations of the music industry appeared for the first time as a united front. Now music groups and independent labels, publishers, event organizers, club operators and the musical instrument and equipment industry want to consolidate this solidarity - but without founding a new umbrella organisation.

<https://beta.musikwoche.de/details/453721>



Thanks!

Questions?

contact: heidemann@vut.de