



the global trade body for independent music publishers

IMPF Trade Mission Germany

IMPF hosted a trade mission to Germany on March 18, inviting members from across the globe to gain insights from a range of top music professionals working in the territory.

The trade mission opened at the offices of the German Music Publishers Association (DMV) in Berlin, with a welcome by **Annette Barrett, president IMPF** and with opening remarks from **Goetz von Einem (DMV)** and **Maximilian Paproth (Budde Music Germany)**, who provided an introduction to the German music publishing environment and the broader market context. The session set the scene for the day by outlining the structure of the German market, the role of publishers, and the key trends shaping rights management and revenue generation.

Goetz von Einem welcomed participants to the DMV headquarters, highlighting the historical significance of the building as a long-standing centre for music publishing activity and explaining that the site now hosts several music-industry organisations, reflecting Germany's collaborative industry structure: "We are all under one roof," he said. "It's a place to come together in the spirit and interests of music."

He introduced DMV as one of the oldest trade associations in Germany, representing the majority of the country's music publishers, from major international companies to long-established family-owned firms and a growing number of small independent publishers.

He noted that the German publishing market is estimated at around €600 million annually, with a large share of revenues coming from collective management income, particularly through GEMA. Classical and printed music publishing remain unusually significant in Germany compared with many other markets, still accounting for a substantial portion of revenues. Von Einem also outlined current priorities for publishers, including ongoing reforms to cultural funding within GEMA, efforts to modernise data and rights management systems through integration with ICE, and legal actions relating to AI training and licensing, which are seen as critical to protecting the value of repertoire.

Maximilian Paproth then presented a high-level overview of the German music market dynamics. He explained that the market is strongly driven by digital consumption, although physical formats — especially vinyl — continue to generate meaningful revenue. He highlighted the dominance of international repertoire in radio and streaming charts, noting that German artists often release in English in order to compete internationally. Paproth emphasised that success in Germany increasingly depends on coordinated, long-term strategies across multiple platforms, as radio,

streaming, live performance, social media and sync placements no longer translate automatically into one another.

He explained: "TikTok doesn't automatically trigger streaming in Germany; streaming success doesn't automatically translate to sold out tours; a radio hit doesn't automatically create a streaming hit... Make sure you keep the fanbase happy and active between releases. A well thought out marketing mix from the record company or management is essential.

He stressed that publishers and labels must work closely together to build sustainable careers rather than relying on individual hits, encouraging a portfolio approach for songwriters and composers, with activity across multiple projects, formats and territories.

"The German market rewards flexibility," he said. "It's all about building repertoire and careers with a holistic long term approach. Don't stick to one project in the hope it's going to be big – that's not the right approach anymore. Make sure [your songwriters] are in as many rooms as possible."

The session concluded by underlining that the German market rewards flexibility, strong partnerships, and long-term planning, themes that would recur throughout the rest of the trade mission discussions.

Live sector in Germany: touring economics, audience trends and artist development

The second session focused on the **German live music sector**, led by **Matthias Noelte of Budde Talent Agency**, and explored how live performance has become the central economic driver for many artists. The discussion underlined that in Germany, live music is no longer a secondary revenue stream but a core part of career-building, with touring and concerts often generating more meaningful income than recordings or streaming for developing acts. Against the backdrop of a crowded and competitive market, the session emphasised that artists increasingly depend on live performance as the foundation of a sustainable career.

A central theme was the **growing complexity of audience development**. Noelte noted that fans now often discover artists through **Instagram, TikTok and other social platforms**, which has fundamentally changed how live shows are marketed.

Viral momentum can help drive awareness, but it does not always translate directly into streaming, radio success or ticket sales. By contrast, some younger artists with strong social-media traction can sell large numbers of tickets very quickly, even without a long live track record. This highlighted a broader point repeated throughout the session: success in the live market depends on understanding where audiences are formed and how they move — or do not move — between platforms.

Noelte described the current landscape as follows: "We had around 250,000 pop concerts take place in Germany in 2024. There are 5m regular concert attendees in Germany – 22% more than 20 years ago. 48% of young fans discover events via Instagram, 64% of Gen Z actively search for events on social media."

The conversation also stressed that **radio airplay and live success are increasingly disconnected**, particularly for domestic German repertoire. A hit on radio may still support visibility, corporate bookings and broader profile-building, but it does not automatically sell concert tickets. Instead, strong ticket sales tend to come from a combination of factors: artist identity, sustained fan engagement, coherent digital strategy, and a compelling live proposition. Participants discussed how the most effective artist development now requires a **long-term, multi-channel approach**, combining releases, live activity, social media, brand opportunities and strategic partnerships.

Another key issue was the **intense pressure of the touring market itself**. With high production costs, rising ticket prices, heavy competition for audiences, and limited festival slots for emerging acts, promoters and agents must be increasingly selective and strategic. The session highlighted the importance of venue choice, efficient routing, repeated performances in the same market where possible, and realistic expectations around growth. Festival exposure remains valuable, but access is limited and often favours established names, leaving developing artists reliant on strong relationships and careful planning to break through.

The discussion concluded by reinforcing that the German live market rewards **patience, consistency and career-building over quick wins**. For agencies, publishers and managers alike, the challenge is to identify artists early, support them over the long term, and help them build an audience that can translate into lasting live demand.

“Budde Talent Agency cannot always compete financially with the biggest agencies,” Noelte offered as an example. “We find artists at the club level and take them through to the arena level. It’s important to find artists that we believe in early on.”

Radio market in Germany: programming, access and publishing value

The third session provided an in-depth look at the **German radio market**, led by **Andreas Zagelow of MDR**, who offered a practical overview of how radio operates in Germany and what it means for artists, songwriters and publishers. He began by noting that radio remains a highly significant medium despite the growth of streaming: a large majority of the German population still listens to radio on a daily basis, and public-service as well as private broadcasters continue to play an important role in audience reach, discovery and rights income.

“Over 75% of the population over 14 are listening to radio daily,” he said. “That’s more than 53 million people listening to more than 300 radio stations, with an average listening time of over 250 minutes. There are 70 radio stations by 9 state public service broadcasters.”

Zagelow explained the structure of the German market, highlighting the strong role of **regional public-service broadcasters** alongside a large number of private stations. Within public radio, different stations typically serve different demographics, from youth audiences to mainstream adult listeners and cultural programming. This regional and segmented structure makes the market more complex than a single national playlist system, but it also creates multiple entry points for repertoire depending on audience, format and editorial priorities.

A major part of the discussion focused on **how music gets onto radio playlists**. Participants heard that access usually comes through a combination of digital promotion platforms, radio promoters, label and management relationships, and direct contact with music editors. However, simply delivering music is not enough: stations are looking for songs that fit their format and audience, and for artists who can be developed over time through interviews, off-air performances and broader collaboration. Zagelow stressed that radio works on a longer timeline than streaming, often requiring sustained focus on a single track over several months, and that frequent releases can work against building recognition with listeners. Personality, artist story and availability for promotion were presented as important factors alongside the music itself.

“It takes time to make a song popular on radio,” he explained. “If you want your artist to put out eight songs in the next nine weeks, we will only choose one. If we put a new song out every week, it won’t have an effect on radio.

“We also need to give your artist a face and personality,” he added. “To become a fan of a musician, you need a connection. That’s our task. If we get a promo pack that says an artist has 3 million plays on Spotify, that’s ok, but how can I make them into a person?”

The session also made clear that **radio and streaming function very differently**. While streaming can respond instantly to trends, radio remains more structured, research-driven and audience-tested. Stations monitor airplay charts, streaming data, Shazam, TikTok and competitor playlists, but final programming decisions are also shaped by listener research and internal editorial judgment. The speaker showed how songs are tested with audiences and how playlists are built to balance familiarity, discovery, tempo and mood, all with the aim of keeping listeners engaged while still introducing new music.

From a publishing perspective, the session underlined that **radio still matters economically**. Airplay continues to generate meaningful performance income through GEMA, particularly on larger stations, and radio can remain a valuable source of long-term revenue even if it no longer functions as the primary tastemaker it once was. At the same time, several participants observed that radio success does not automatically convert into streaming or ticket sales, especially for younger artists, reinforcing a theme heard earlier in the day: every platform now plays a different role in artist development.

The session closed with a discussion about the future of radio, including questions around digital distribution, regional cooperation and the challenge of maintaining relevance with younger audiences. Even so, the overall conclusion was that radio remains a significant part of the German music ecosystem — not as a standalone driver of success, but as an influential, structured and still valuable platform for visibility, audience-building and publishing income.

Film, TV and sync market in Germany: music supervision, licensing and practical realities

The fourth session focused on the **film, TV and audiovisual sync market in Germany**, with insights from **Milena Fessmann of Cinesong**, moderated by **Tanya Timofeeva**. The discussion offered participants a practical overview of how music is selected and licensed for screen productions in Germany, and how publishers can engage more effectively with music supervisors, production companies and creative teams.

Milena Fessmann described the role of the music supervisor as one that sits between the creative ambitions of a production and the legal and financial realities of licensing. She explained that music supervision involves helping directors and producers shape the musical identity of a project while also managing rights clearance, budget limitations and timing pressures. In practice, this means balancing artistic ideas with what is actually feasible, identifying alternatives when requested tracks are too expensive or unavailable, and ensuring that music choices genuinely support the narrative and emotional tone of the production. She emphasised that this is a highly relationship-driven field.

“It helps a lot to get to know people and understand who you are talking to,” she suggested. “Having long-term relationships that you can rely on is always beneficial. You have to be able to trust each other. I like to be transparent and share as much information as possible with the other side.”

The session underlined that Germany has a **large and active screen-production market**, with significant output across film, television and streaming, which creates consistent demand for sync. At the same time, the German market has some distinctive characteristics, including the use of **blanket licensing for certain public-service television productions**, where some repertoire can be used without individual sync negotiation, with remuneration instead flowing through collective management structures. While this mainly applies to domestic broadcasting and not international exploitation, it remains an important feature of the German landscape and affects how music is sourced for some productions.

A major part of the discussion centred on **how music supervisors discover and select repertoire**. There is no single route into the market: supervisors work through a mixture of publisher relationships, direct recommendations, databases, newsletters and personal listening. Fessmann made clear that direct contact with publishers is useful, but only when it is relevant, well targeted and professionally presented. Clear information about ownership, sub-publishing arrangements, ease of clearance and realistic pricing is especially valuable, because uncertainty around rights can quickly make a track unusable. Personal relationships and industry presence were presented as much more effective than untargeted cold outreach.

The conversation also highlighted the importance of **authenticity in sync choices**. Productions increasingly want music that feels culturally, emotionally and contextually credible, whether that means the right genre for a scene, the right sonic identity for a character, or the right local flavour for a setting. This often creates opportunities for independent and emerging repertoire, especially where it offers originality and affordability.

“Depending on your definition of indie and major, I have had good experiences with both, but my heart is always with indie music,” she said. “I like to explore things - going to the Top 100 on Spotify is a job anybody can do. Authenticity is very important. If the music tells another story or adds something extra, then it’s good.”

Library music remains widely used for background or lower-priority uses, while bespoke score and featured songs are handled more selectively and strategically.

“I’m using a lot of library music,” said Fessmann. “Mainly for background, if it’s not ‘that important’ because it’s just used as a setting for a place like a club or a restaurant. Library music isn’t as cheesy as it used to be. I would always prefer to ask musicians or bands that I know to make something unique for the project, but it’s tricky for directors because you don’t know what you’re going to get.”

At the same time, Fessmann stressed the importance of not undervaluing music simply to secure placements, particularly in higher-budget productions, where fair fees should still apply.

“I think actual musicians should get properly paid,” she said. “Music is still valuable, and I’m trying to maintain that value. If I’m working on a big Netflix show, I feel that musicians should get more than, say, €500. It’s different when it’s a small film, but a big budget production should have an ok budget for music. If you have a €20 million production, you should at least be able to pay a band €2,000.”

The session also touched on broader market developments, including pressure on budgets, the importance of getting music supervision involved early in the production process, and growing concerns around AI-generated music. The overall view was that, in higher-end film and television, there is still strong resistance to AI-generated music where authenticity and artistic credibility matter, although lower-budget and functional uses may develop differently over time.

Overall, the session showed that sync in Germany is not simply a licensing exercise but a creative and relational business, where success depends on understanding how productions are made, communicating clearly, and building trust with the people shaping projects from the inside.



IMPF is the global trade and advocacy body for independent music publishers. IMPF helps to stimulate a more favourable business environment in different territories and jurisdictions for artistic, cultural, and commercial diversity for its music publisher members and the songwriters and composers they represent. www.impforum.org