

## Media and advertising

When asked about the special characteristics of the Austrian media and advertising market, media managers cite the high media concentration in the print sector, the limited audience and narrowness of the advertising market, as well as the existence of a powerful media scene.

**T**he Austrian media and advertising market, with a spending volume of just over five billion Euros, isn't exactly a "global player". But—despite globalisation—there are certain peculiarities that deserve special attention. It is virtually impossible to simply transfer international strategies to Austria.

The capital city of Vienna is the hub of the media scene owing to the size of the country and the well-established structures. This is where all the important decisions are taken in the communications industry. The limited size of the territory permits fast, simple communication—something that also appeals to international clients. One thing that doesn't work is trying to handle the Austrian market on a "sideline" basis from abroad, notably from Germany. That can go wrong for a number of different reasons—ranging from peculiarities of the Austrian dialect to the mentality of readers and users. A strong local presence on Austrian soil is deemed invaluable by media experts.

### Special characteristics

One of the first things that strikes you about the Austrian media landscape is the high degree of market concentration. This is primarily due to the market being dominated by the "Kronen Zeitung", the country's biggest-selling paid daily newspaper, and the public broadcasting corpo-



Gerhard Riedler,  
CEO of the  
Kronen Zeitung:



### Strong in print

Austria is a land of newspaper readers and strong print brands: More than half of the traditional advertising volume is invested in print, and seven in ten Austrians read a newspaper on a daily basis. The Kronen Zeitung alone is read by one in three Austrians. This makes media planning more straightforward. It's fair to say that small is beautiful: The size of the country and the existence of well-established structures explain why Vienna is the hub of Austria's media scene and the decision-making centre of the communications industry. This focus on Vienna makes certain things easier—not only for domestic clients, but for international ones as well.

ration ORF. Foreign owners also have a significant influence on the Austrian media—in both the print and TV segments. The Austrian advertising and reader market is characterised by its limited size in terms of potential advertising and marketing revenue—a problem confounded by direct and indirect competition from the much larger German media market that shares the same language.

For years, the print media have accounted for the majority of advertising expenditure, followed by TV and online media. Turnover generated by the latter—though displaying strong growth—is still well below the revenue from print advertising in terms of absolute figures. However, digital transformation continues to make major strides. Some publishing houses are currently noticing a significant shift towards programmatic advertising.

A completely different picture can be seen on the international advertising market, where advertising via digital media is experiencing the fastest growth. Austria is up to date as regards digital models for anything from programmatic advertising to content marketing. But while programmatic buying accounts for over a half of total expenditure on many international markets, its share in Austria is still very low. Experts are convinced that the marketing winners of the media industry will be offering data-driven communication approaches in future. However, for the time being, revenue streams from sales and advertising in the print segment represent the most important sources of income for the print media. •



Friederike Müller-Wernhart, CEO of Mindshare Austria:



## High levels of reach

Geared towards nationwide campaigns and featuring a high proportion of purely Austrian programme content, TV in Austria is quicker at achieving high levels of quality reach for television campaigns, thus making them more effective than in neighbouring countries. In combination with digital video advertising, this ensures that all Austrians are exposed to advertising campaigns within the shortest possible space of time. Austria has a strong regional print landscape, which makes the digital advertising share of the total advertising market—18 per cent—appear relatively low by international standards. However, given the popularity of smartphones and the extensive Internet network, consumer behaviour with respect to digital communication will soon match that seen in countries like the UK.

# QUALITY AND COVERAGE

**DAS HAB' ICH VOM KURIER**  
[WHAT I GET OUT OF KURIER]



**7.6 %**  
**NATIONAL COVERAGE**  
(WEEKLY AVERAGE)  
**9.5 %**  
**ON SUNDAY**

Source: Media-Analyse 2016,  
Margin of Deviation max. +/-0.5%

**35.2 %**  
**COVERAGE AMONG**  
**DECISION MAKERS IN THE**  
**MAIN ECONOMIC ZONE OF**  
**VIENNA, LOWER AUSTRIA**  
**AND BURGENLAND**

SOURCE: LAE 3.0 / 2015, BASED ON VIENNA, LOWER AUSTRIA  
AND BURGENLAND, CROSS-MEDIA REACH,  
PRINT/DIGITAL YESTERDAY  
MARGIN OF DEVIATION MAX. 2.2%



Austria's leading quality daily newspaper scores highly with economic expertise among decision makers, top earners and brand buyers. **The perfect environment for your advertisement!**

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