
Yearbook 2021

The Quality of the Media

Main findings

The coronavirus pandemic as
a catalyst for the structural crisis
of journalism



Main Findings – The coronavirus pandemic as a catalyst for the structural crisis of journalism

Mark Eisenegger, Daniel Vogler

Summary

The coronavirus pandemic has fundamentally affected many areas of society, and journalism is no exception. During the initial phase of the pandemic, there were still signs that there could be positive effects on journalism. This was a time when news media was in high demand and seen as a credible source of information. At least in the short term, there seemed to be a growing awareness of the importance of high-quality journalism in society. But now, after more than a year in crisis mode, the balance sheet presents a sobering picture. The financial basis of journalism has continued to suffer during the crisis. Advertising revenues in particular have fallen dramatically. Journalism finds itself in a situation that was already tense before the crisis, and lacks the resources for high-quality reporting now more than ever.

The fact that the economic crisis in journalism has once again become more acute is an unfavourable development. After all, it is not only in times of crisis that journalism plays an extremely important role for society. It contributes to the creation of an informed population and limits the spread of disinformation, for example. In fact, the phenomenon of disinformation, i.e., the deliberate dissemination of false information, also gained importance in the perception of the Swiss population during the pandemic. Disinformation is one of the main issues on which this Yearbook focuses. It asks: How does the population perceive the topic of disinformation, how do they deal with it, which sources are considered particularly important for the spread of disinformation and which factors positively influence the resistance to disinformation in society? This in-depth study with a survey on disinformation shows, among other things, that the Swiss are concerned. They perceive disinformation as a problem, especially for a society dealing with a crisis. At the same time, the news media is seen as an essential component of the defence mechanism against disinformation.

The quality of media coverage about the coronavirus pandemic is another focus of this Yearbook. This Yearbook has replicated a study on coronavirus reporting that was published in the last Yearbook. This allows to assess the development of quality of media coverage about the coronavirus pandemic over a longer period of time. This issue is important because the way in which the media reports on social crises affects their credibility and ultimately their power to counter phenomena such as disinformation. The attention the coronavirus pandemic finds in comparison to other issues, the extent to which the media critically (or uncritically) reports on government decisions and whether or not it provides context and considers diverse perspectives are therefore relevant questions. In the first wave of the pandemic, journalism overall did a good job in covering the pandemic (Eisenegger et al., 2020). However, there were also weaknesses in media coverage, such as the lack of contextualising numbers and statistics on the pandemic. The new in-depth replication study therefore examines how the media covered the second wave of the pandemic and whether journalism learned from the criticism it received during the first wave.

Due to the negative effects on journalism – financial losses suffered by the media, among other things – the pandemic also affects media quality beyond the coronavirus issue. Deficits which already existed are being accentuated once again. Even before the crisis, diversity was identified as a key problem area for media quality (Vogler et al. 2019). Having a diverse set of actors with a diverse set of opinions in the public sphere is fundamental for the democratic process. The media can help to ensure that all relevant social groups are adequately represented in political debates and decision-making processes. A central aspect in this respect is the representation of gender in the media. The issue of diversity therefore plays an important role in this Yearbook. A large-scale study investigated how often women are mentioned in the media and in which contexts women are covered. The conclusion is sobering. Compared to men, women are strongly underrepresented and are less often portrayed in positions of high status. Women's positions and concerns thus have less opportunity to receive attention. However, the study also shows that journalistic resources have a positive influence on the media representation of women. Resources are

thus an important factor in counteracting inequalities in media coverage.

Another study on the referendum to ban face coverings (colloquially known as the «burqa initiative»), a type of identity and migration policy issue, also examined the diversity of actors and positions in news media and on *Twitter*. The study came to the conclusion that minorities, which are directly affected, have little say in public debate. Women of Islamic faith or who have a migrant background are particularly disadvantaged in terms of receiving sufficient media coverage. This disadvantage differs between news media and social media. Due to its professional selection criteria (e.g., balance), news media can compensate for such inequalities to a certain extent. On *Twitter*, however, these social inequalities are more strongly reflected.

Media diversity involves the inclusion not only of a diverse range of actors and their positions, but also of a diverse range of topics. The last in-depth study in this Yearbook deals with media coverage about culture. It examines the importance and quality of culture coverage in the Swiss news media and offers an inventory of the landscape of cultural platforms in Switzerland. The results show that the quality of media coverage about culture is at risk. However, there are still some media types, most notably public radio, Sunday and weekly newspapers and subscription newspapers, that invest resources in cultural reporting and offer a higher level of quality. At first sight, the web offers cultural connoisseurs a large pool of cultural information with various outlets. As a rule, however, these are niche offerings and the majority of them are run by associations, i.e., they pursue vested interests. Therefore, they cannot replace independent journalistic media when it comes to reaching a broad audience and the diversity of reporting formats.

If we abstract from quality of media coverage about culture and focus on the quality dynamics in the Swiss media arena as a whole, we can clearly notice changes caused by the coronavirus pandemic. Compared to last year's Yearbook, the Swiss news media reported more on relevant topics such as political issues than on soft news. Contextualisation has also improved, i.e., the trend in recent years toward a decreasing weight of background and contextualising reporting has been slowed down for the time being.

Several media types with normally below-average quality scores improved in the coronavirus year. Among others, private television, online commuter newspapers and tabloids on- and offline achieved the best or second-best quality scores in six years.

In more detail below, the following main findings summarise the crucial insights of these five in-depth studies and the insights of the regular 2021 Yearbook edition on the development of media quality, media usage, the attitudes of the Swiss population towards journalism, the financial situation of the Swiss news media and media concentration. In the conclusion, we provide recommendations for action.

1 Studies

1.1 Perception of disinformation in Switzerland

Intentionally spread disinformation is a serious problem for society. It is a major challenge for democracies and thus also for information journalism. Disinformation can spread quickly and to a large number of users, especially via social media platforms and messenger services. The coronavirus pandemic has boosted disinformation in the perception of the Swiss population. The first in-depth study in this Yearbook looks at the extent to which people in Switzerland perceive disinformation as a problem, which channels and actors they identify as the source of disinformation and how they deal with content that could be regarded as disinformation. To this end, a representative survey of adults in German-speaking Switzerland, French-speaking Switzerland and Italian-speaking Switzerland was conducted.

Overall, the results show an ambivalent picture with regard to the perception of the problem: on the one hand, almost one half of the respondents (49%) considers disinformation to be a big or very big problem. On the other hand, a slight majority (51%) assess the problem as not particularly dangerous. When asked about the specific damage that disinformation can cause, the most vulnerable areas were said to be the effective management of crises and trust in the media and politics.

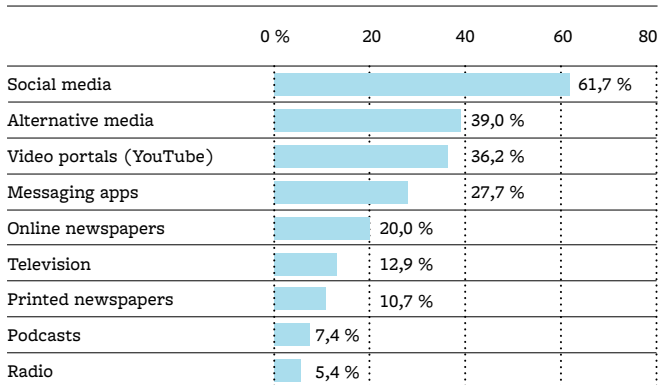


Figure 1: Channels of disinformation

The diagram shows the channels on which people in Switzerland say they often or very often encounter disinformation.

Reading example: According to their own statements, 61.7% of Swiss citizens often or very often encounter disinformation on social media.

According to their own statements, people in Switzerland come across disinformation primarily on social media (61.7%), in alternative media (39%), on video portals (36.2%) and in messenger apps (27.7%) (cf. Figure 1). Professional news media – above all radio (5.4%), printed newspapers (10.7%) and television (12.9%) – are, on the other hand, identified significantly less as sources of content that could be regarded as disinformation.

The results indicate that individuals rather than organisations or institutions are regarded as the sources of disinformation (cf. Figure 2). Media companies (13.8%) and state authorities and institutions (15.8%) are cited least frequently as the sources of disinformation. People in Switzerland therefore place a high level of trust in the truthfulness of the content communicated by news media and institutions. This is one of the reasons why the respondents see authorities and news media (along with operators of social media platforms) as being primarily responsible for combating disinformation, as opposed to individual citizens.

The study also shows that respondents primarily use the websites of the federal government and authorities, journalistic media and *Google* to check for possible disinformation. When disinformation is identified, respondents often react with clarifying behaviour, for example by informing those around them or by blocking the source of disinformation.

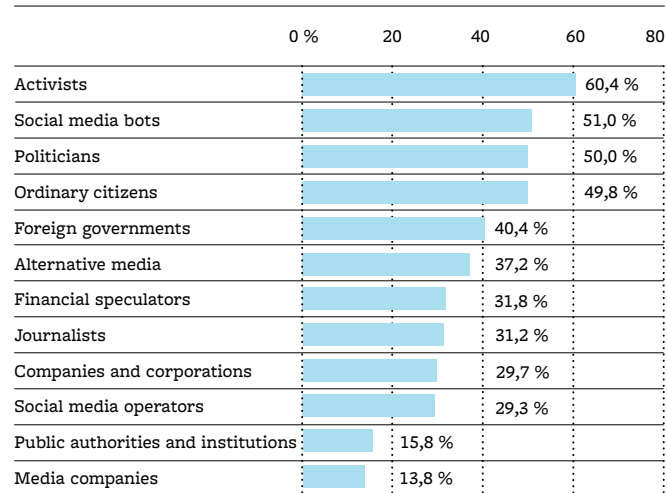


Figure 2: Sources of disinformation

The diagram shows the shares of the top five rankings of sources of false information. The shares of the top five rankings are shown in percent. (0% = «Actor(s) is/are never ranked among the top five sources of false information»; 100% = «Actor(s) is/are always ranked among the top five sources of false information»).

Reading example: In Switzerland, activists are most frequently named among the top five sources of false information by 60.4% of respondents.

In sum, the results suggests that people in Switzerland are currently paying increased attention to the topic of disinformation and are showing greater awareness of the problem. This is an opportunity to further sensitise the population to the problem and to promote a critical approach to content and sources that could be considered as disinformation. At the same time, our study makes it clear that an intact system of professional news media, including public media, is absolutely essential for Swiss society's resilience to disinformation. It is therefore all the more urgent to put a stop to the accelerating loss of resources in information journalism.

1.2 Lessons learned? Quality of media coverage about the coronavirus in comparison

News media fulfils important functions, especially in times of great uncertainty such as the coronavirus crisis. Accordingly, the question of the quality of media coverage of the coronavirus

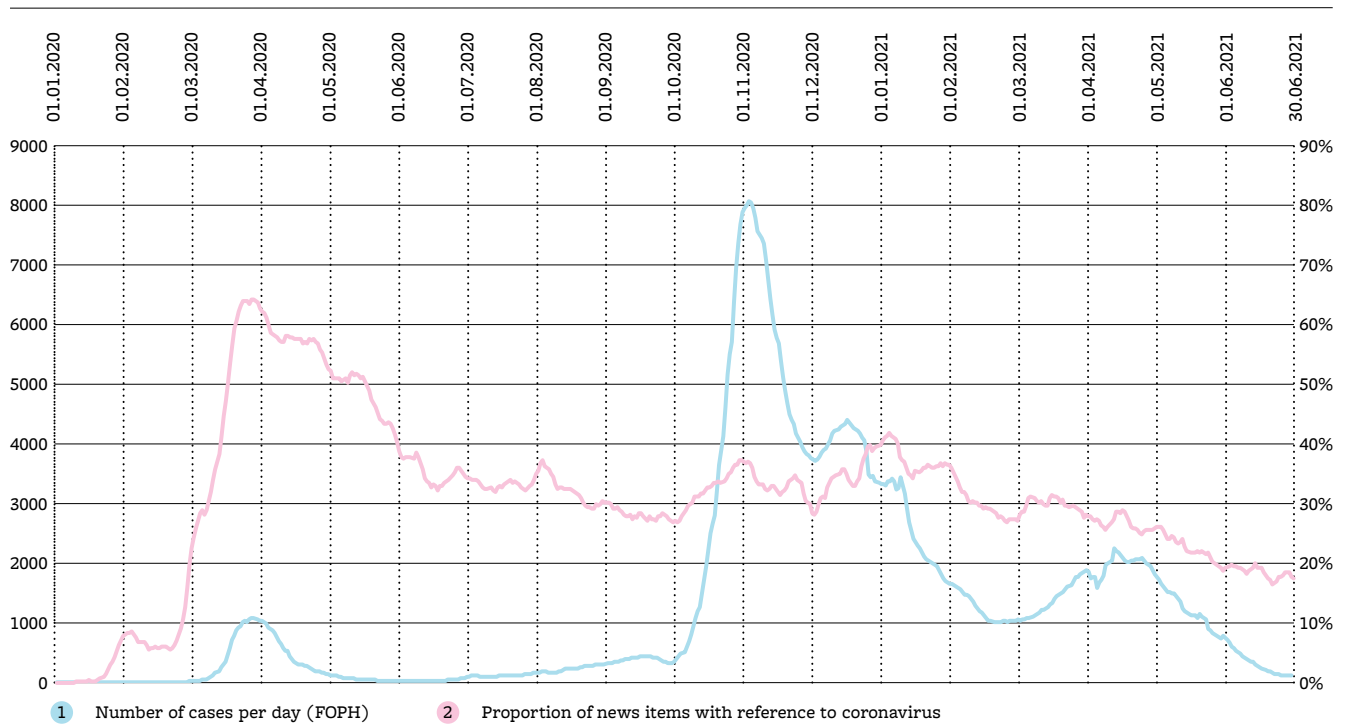


Figure 3: media attention and case numbers in Switzerland

The diagram shows the percentage of news items with reference to the coronavirus in the total news coverage (pink curve) in the media sample for the automated content analysis and the officially newly reported coronavirus cases per day in Switzerland (blue curve) (source: Federal Office of Public Health), covering the period from 1 January 2020 to 30 June 2021 (n = 117,900). The daily data for both data series is presented as a moving average of seven days prior to each measurement point.

Reading example: October 2020 saw the highest number of new cases reported. In contrast, the highest amount of news items on the coronavirus - measured in terms of total news coverage - were published in March 2020.

pandemic is of great importance. Since the beginning of the pandemic, coronavirus reporting has been criticised for being too alarmist, too uncritical of the authorities, too lacking in contextualising numbers and statistics and, with regard to the selection of experts, too one-sided. The comprehensive analysis of the first wave of the pandemic in the last *Quality of the Media yearbook* (2020 edition) refuted many of these accusations and gave journalism a relatively good overall assessment (Eisenegger et al., 2020). However, there were also shortcomings. The aim of the in-depth study of coronavirus coverage is to examine whether coverage of the second wave (01.09.2020–28.02.2021) differs from that of the first wave (01.01.2020–30.04.2020) and to what extent journalism in Switzerland has learned its lessons from covering the first wave.

Compared to the first wave, the intensity of reporting is not in line with the development of the number of cases. Thus, media attention decreases in the second wave despite massively higher case numbers (cf. Figure 3). Journalists present the coronavirus as a threat less frequently (6%) in the second wave than in the first wave (16%) – despite a higher number of cases. The repeatedly raised accusation that the media is engaged in «scaremongering» in connection with the coronavirus pandemic is thus not supported by our study. On the contrary, it could even be argued that the coronavirus reporting did not fulfil its early warning function. In the second wave, for example, there was also an increase in mental health conditions in the population, which were only a very marginal topic in the news media.

Our study also shows a decrease in reporting explicitly supportive of the authorities (first wave 6%; second wave 0.3%). The accusation of uncritical pro-government reporting is thus refuted by our study. Figures and statistics are also contextualised more frequently (first wave 12%; second wave 21%). Both findings are positive from a quality perspective. Thus, the study suggests a certain learning process of information journalism in dealing with the pandemic as a virulent, social crisis.

However, our replication study also reveals various shortcomings. The diversity of experts in media coverage remains severely limited. The majority of scientists featured in the media continue to come from the medical field. Their share in the second wave is even somewhat higher (83%) than in the first wave (78%). Social sciences and the humanities, on the other hand, play only a minor role in the second wave. Female scientists also continue to be significantly underrepresented compared to their male colleagues. Compared to the first wave (12%), however, they appear somewhat more frequently in the second wave (21%). Overall, from a quality perspective, diversity is once again the biggest problem area in reporting.

1.3 Women in the media

Diversity is lacking not only in coronavirus reporting but also in the representation of gender in the media in general. The results of the in-depth study on the representation of women in Swiss media show that women are significantly underrepresented. For every mention of a woman, there are around three mentions of men (i.e., the proportion of women is 23%). This imbalance exists in all Swiss language regions and across all media types, with slight differences. The values differ somewhat more at the level of individual news outlets. Depending on the news outlet, the proportion of women varies between 19% and around 29%. An improvement in terms of equal representation was only seen in 2019, which was marked by the Women's Strike Day and led to a slight short-term increase in the proportion of women in media coverage.

If media coverage is further differentiated in terms of subject areas and types of news, further

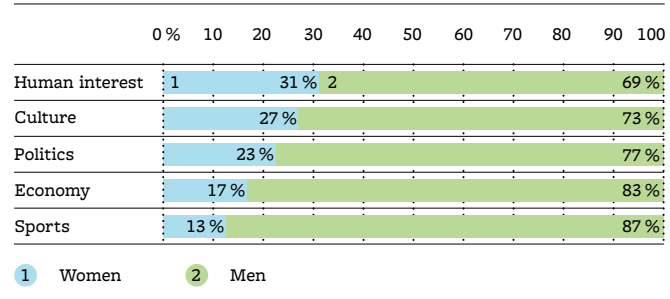


Figure 4: Proportions of women and men in Swiss media coverage by social sphere

The chart shows the average percentage of women and men in media coverage of the five social spheres of human interest, culture, politics, economy and sport for the period from 2015 to 2020.

Reading example: The share of women in media coverage of human-interest topics is 31%, the share of men is thus 69%.

gender differences become apparent (cf. Figure 4). The largest gender gap exists in economic news (proportion of women 17%) and sports news (proportion of women 13%). The gender gap is smallest in media coverage about culture (proportion of women 27%) and human-interest topics (proportion of women 31%). Political reporting is in between (proportion of women 23%). The type of news also plays a role: the presence of women is twice as high in news items produced by media outlets' own journalists than in news items based on agency reports. If journalists can invest in resources and write articles themselves, the media presence of women is positively influenced. This is consistent with the finding that women are more present in person-centred formats, such as interviews and personal features, than in regular news stories.

There are also major differences in terms of the social contexts in which women and men are portrayed. The higher the hierarchy level, the more pronounced the gender gap. For example, the proportion of women is 17% for top management functions, 22% for people in simple management functions and 27% for people at employee level. The differences are less pronounced when it comes to reporting on people in private contexts. When private matters are reported, the proportion of women is 33%. The proportion of women is 24% when professional/public contexts are discussed.

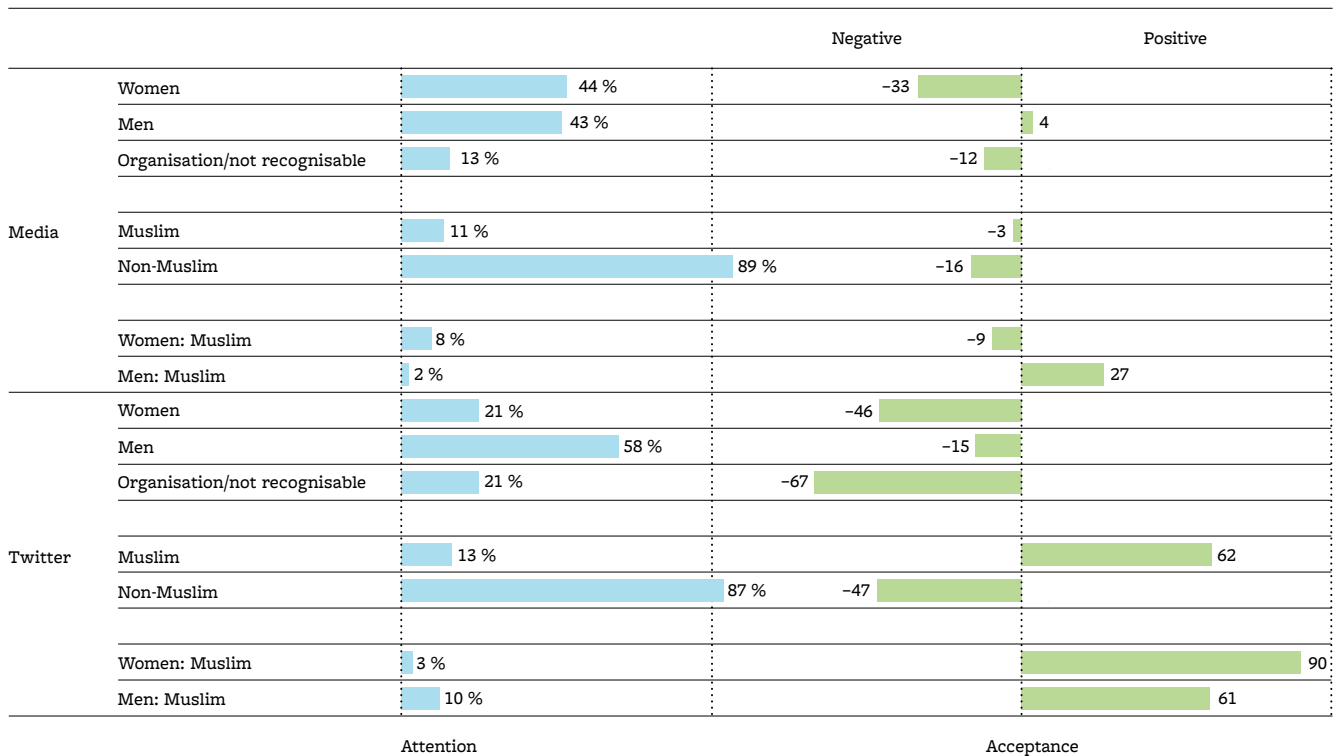


Figure 5: Attention shares of actors by gender, religious context and acceptance of the ban on face coverings

The graph shows the percentage of women, men and organisations, of actors with and without a Muslim context and of women and men with a Muslim context for the media coverage and for the *Twitter*sphere respectively (media: n = 712 statements; *Twitter*: n = 1,078 tweets). The acceptance index can take on values between +100 (exclusively positive) and 100 (exclusively negative).

Reading example: Of all the statements recorded in the media, 8% are made by women with a Muslim context; among them, the rejection of the ban on face coverings is somewhat more pronounced than the approval (-9).

Overall, our results confirm existing gender inequalities in Swiss media coverage and the need for action for journalism in Switzerland. Despite composing just over 50% of the population, women are significantly underrepresented in media coverage in all areas.

1.4 Actors and their positions in the «burqa ban» referendum campaign

In addition to gender, other factors such as religion, place of origin and socioeconomic status also play a role in determining visibility in media coverage. Accordingly, another study examines the visibility of actors and their positions in the public

debate on the initiative «Yes to the ban on face coverings», which was approved by Swiss voters in March 2021. Because the debate on this vote – often referred to as the «burqa initiative» – focused on the question of women’s rights and the role of Islam, we are particularly interested in the visibility of Muslim actors and their positions. Using the example of Swiss media coverage and the debate on *Twitter*, we show that diversity was limited. Muslim actors, as a minority directly affected by the vote, did not find high attention either in the media (11%) or on *Twitter* (13%). Muslims were more often talked about than they were given a chance to talk themselves. Although the vote primarily affected women, they were clearly in the minority on *Twitter* (21% vs. 58%), but were equally as present in the

Sphere	Share of total coverage	Share of coverage produced by staff	Share of contextualising coverage	Share of emotionally charged coverage	Share of personalised coverage	Share of coverage relating to Switzerland
Culture	10,3%	77,7%	11,9%	7,9%	44,0%	53,5%
Politics	30,9%	65,6%	27,1%	5,5%	25,9%	57,9%
Economy	13,3%	62,1%	17,0%	4,6%	12,1%	63,7%
Sports	13,6%	58,9%	6,6%	11,7%	54,7%	58,6%
Human interest	29,8%	61,3%	7,2%	18,2%	47,5%	59,7%
Science	2,1%	61,8%	20,3%	3,9%	15,3%	33,7%

Table 1: Comparison of topics in coverage about culture

The table shows how the quality indicators of contextualisation, emotionality, personalisation and reference to Switzerland (reference area regional and national) differ in news coverage about culture from coverage on politics, business, science, sport and human interest stories.

Reading example: Coverage about culture has the highest share of editorial contributions with 77.7%. The lowest share of editorial contribution is for sports topics (58.9%).

media as men (44% vs. 43%). Consequently, the veiling of women in Islam was mainly discussed by non-Muslim men on *Twitter* and by non-Muslim men and women in the news media. News media, in its professional logic, is thus more able to reflect socio-political power and majority relations and to strive for balance and a more diverse spectrum of actors.

1.5 Quality of coverage about culture

News media plays an important role in communicating cultural issues: for the general population, it is the place where they learn about cultural topics and events. Journalistic media thus plays a key role in promoting an understanding of the processes and functions of culture, as well as the concerns of cultural practitioners. They can thus also have an integrating effect on society and create a basis for a common identity and shared values. The results of our study on the quality and significance of media coverage about culture show that cultural topics account for around 10% of total news coverage (cf. Table 1). This is relatively modest compared to political news coverage (31%) or human-interest topics (30%). Sports (14%) and economic topics (13%) also receive somewhat more attention. Only science coverage (2%) gets lower shares. The share of culture coverage has remained constant over the last five years. With a share of 13%, cultural topics play a greater role in

the media in French-speaking Switzerland than in its German-speaking (9%) and Italian-speaking counterparts (8%).

Compared to other topics such as politics or economics, cultural reporting is more strongly determined by news items produced by outlets' own staff. These news items have actually increased over time compared to reports based on agency reports. In 2019, 80% of stories were based on staff contributions, an increase of eight percentage points compared to 2015. Sunday and subscription newspapers and public radio have the highest quality arts coverage. This coverage is contextualising, produced by outlets' own staff, not very personalised and also not very emotional.

Coverage about culture is also important in tabloid and free media. Here, however, it is often based on agency reports and is highly personalised and emotional. In terms of diversity, great hopes have been placed on digitalisation, also in the context of culture. However, the existing online platforms are usually niche offerings and are often run by associations with their own vested interests. They cannot replace independent journalistic media when it comes to reaching a broad audience and diversity of reporting formats.

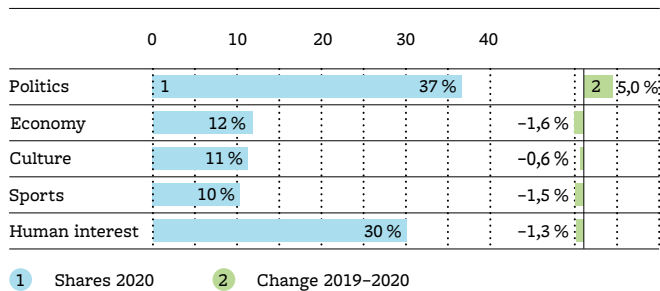


Figure 6: Spheres in annual comparison

The graph shows the shares of the spheres in media coverage in 2020 in the blue bars and the year-on-year change in percentage points in the green bars. The data basis is all news items in the quality analysis from the random sample of the respective years (2019 $n = 20,122$, 2020 $n = 17,294$). Only those 55 media titles for which data has been available since 2015 were selected.

Reading example: Politics was the most coverage sphere in 2020, at 37%; shares increased by five percentage points from 2019 to 2020.

2 Further findings from the Yearbook Quality of the Media

2.1 Media quality stable overall – more focus on politics

The coronavirus pandemic is changing the topics and events that journalists report on as well as their working conditions. This has an impact on media quality. Overall, media quality remains stable, but with changes in the individual dimensions. In the coronavirus year 2020, the media reported more on politics than on soft news such as sport and human-interest stories (cf. Figure 6). Coverage of foreign countries lost weight again in 2020 and geographical diversity decreased. On the other hand, contextualising reporting did not further decrease for the first time in six years.

Even in the coronavirus year 2020, media types such as public broadcasting or subscription news sites stood for significantly higher quality than other media types. Public broadcasting types held on to the top spot despite some loss of quality. But commuter and tabloid media were also able to improve their quality because they have come to focus more often on politics as a result from the change of events. In 2020, nearly half of the media types, namely online

subscription newspapers, private television, online commuter newspapers and on- and offline tabloids, were able to achieve the best or second-best quality scores of the last six years.

Two outlets by the public broadcaster were examined in 2020 for the first time: *swissinfo.ch*, an online platform directed at foreign audiences and Swiss citizens living abroad, and *rtr.ch*, the online platform for the small minority of Rhaeto-Romanic speakers in Switzerland. The quality spectrum of these outlets is quite broad. *swissinfo.ch* stands out with a relatively high quality score of 7.2, mainly because of relevant coverage and background information. This can be explained by the fact that *swissinfo.ch*'s journalistic profile is not primarily aimed at providing daily news. The news site *rtr.ch* is the smallest or least resourced online public offering, and with a score of 5.4 cannot compete with the quality of *swissinfo.ch* or *srf.ch*, but it can compete with the online counterparts of RTS in the French-speaking and RSI in the Italian-speaking part of Switzerland in the dimensions of relevance, contextualisation and professionalism.

2.2 Media use – the coronavirus as the most important topic

News consumption via digital channels has become the norm. The coronavirus pandemic, which was on the personal agenda of the most important events for four out of five users, has not changed this. This is shown by the development of news repertoire types over the past 13 years. The repertoires provide information about which media menu a person typically uses in combination with different media to inform themselves about current events. The three repertoires of the «new world», i.e., users who primarily consume online media, accounted for a total share of 74% in 2021 (cf. Figure 7). At the same time, the group of the «news deprived», which is particularly problematic from a democratic policy perspective and characterised by an undersupply of news (36.3%; -0.4 percentage points [PP]), stagnates at a high level. The repertoire of «intensive users» remains stable (10.7%; -0.3 pp), while the repertoire of «global surfers», who have largely abandoned Swiss news, shows a further increase (28.0%; +1.6 pp). The three repertoires of the «old world», which rely more

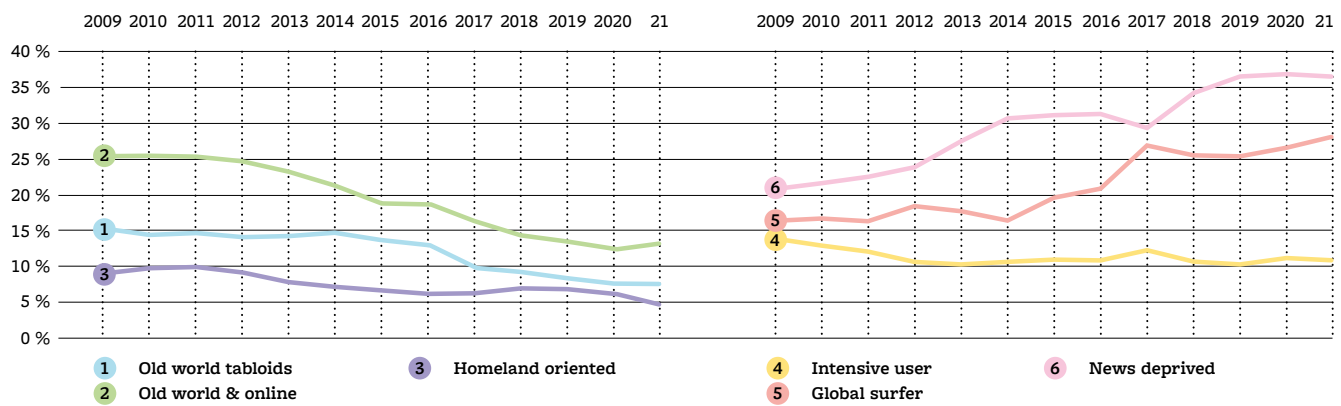


Figure 7: Long-term decrease in old world news repertoires and increase in new world news repertoires since 2009

The chart shows the share developments of the six repertoire types in the period from 2009 to 2021 ($n = 44,564$). The set of underlying media categories was expanded from 2016 to 2017.

Reading Example: The share of the «global surfer» increased from 16% in 2009 to 28% in 2021.

on traditional media, reached a user share of 26% in 2021, while this was still almost 50% in 2009. In this context, the shares of the «homeland oriented» repertoire (4.5%; -1.5 PP) decreased, while the share of the «old world tabloids» repertoire (7.4%; -0.1 PP) remains stable. The repertoire «old world & online», on the other hand, has increased somewhat (13.0%; +0.7 pp), which once again underlines the growing importance of digital channels, even in more traditionally oriented media repertoires.

The shift of news consumption to digital channels has produced specific usage patterns. This includes the so-called «emergent», unbundled media consumption, in which users no longer specifically access certain media brands; instead, individual news articles reach users via algorithms. Emergent media consumption has remained stable compared to last year. A total of 27% (+0.7 PP) of respondents consume online news via social media networks, search engines or aggregators, i.e., platforms in which algorithms play a major role. Brand-supported news consumption, in which media brands are specifically sought out by users, applies to 57% (-1.9 pp) of respondents in Switzerland. The pandemic has therefore not led to increased brand awareness among users.

The use of the various social media channels for news purposes has changed only selectively.

WhatsApp (30%), *Facebook* (27%) and *YouTube* (24%) are still the three most important social media platforms in Switzerland when it comes to using news. *Instagram* (13%), *Snapchat* (4%) and *TikTok* (4%) are used less often, but are particularly popular among 18 to 24 year olds. The use of *WhatsApp* (+3.9 PP) and *Telegram* (+2.7 PP) for news purposes has increased relatively strongly compared to last year. This means that «messengerisation», i.e., the predominant use of private communication via messenger services, continues to gain importance.

2.3 Attitudes - higher trust in journalistic media in times of crisis

Trust is an important prerequisite for journalism, especially in times of crisis, and allows it to fulfil its democratic functions. In Switzerland, just over half of respondents (51%) say they mainly or even completely trust the news media. This represents an increase of seven percentage points in media trust compared to the previous year, bucking the negative trend of previous years. Compared to other European countries, Switzerland is in the top third together with Germany (53%, +8 PP compared to the previous year), Ireland (53%, +5 PP) and Sweden (50%, +12 PP). This result can be interpreted as an

indication that more trust is placed in professional journalism in times of crisis, such as the coronavirus pandemic.

Trust in search engines and social media, on the other hand, remains low, although tech platforms such as *Facebook* and *Google* are considered to be of increasing importance in information use (Lutzer et al., 2020; Schneider & Eisenegger, 2019). Looking at trust in search engines, less than one in three (29%) say they trust them mostly or completely. Only one in five people in Switzerland trust social media mostly or completely. This means that the trust values in search engines and social media have barely changed compared to the previous year.

How satisfied Swiss citizens are with the news media depends heavily on the extent to which their expectations are met by media coverage. Overall, it appears that the majority of the Swiss population considers balance, neutrality and diversity to be important criteria for the reporting of news media. Respondents agree most with the statement that news media should offer a variety of different views on social and political topics (78%). Diversity is thus very much expected. At the same time, our content analyses show that diversity in media coverage suffers the most as a consequence of media concentration (cf. Vogler et al., 2019). In second place, with 72%, is the expectation that media should give equal space to each perspective on an issue. Finally, 70% of Swiss citizens believe that topics should be treated neutrally in media coverage.

2.4 Financing – collapsing advertising markets, acceptance of financial support for the media

The coronavirus pandemic has further accentuated the economic crisis of information journalism. The development in the advertising market in particular is dramatic. Cumulatively, revenues still amount to 1'910 million Swiss francs, which represents a decline of 380 million francs (-17%) compared to the previous year (cf. Stiftung Werbestatistik Schweiz, 2021). All sectors face losses in the double-digit percentage range. A sharp decline of CHF 197 million (-21%) compared to the previous year is

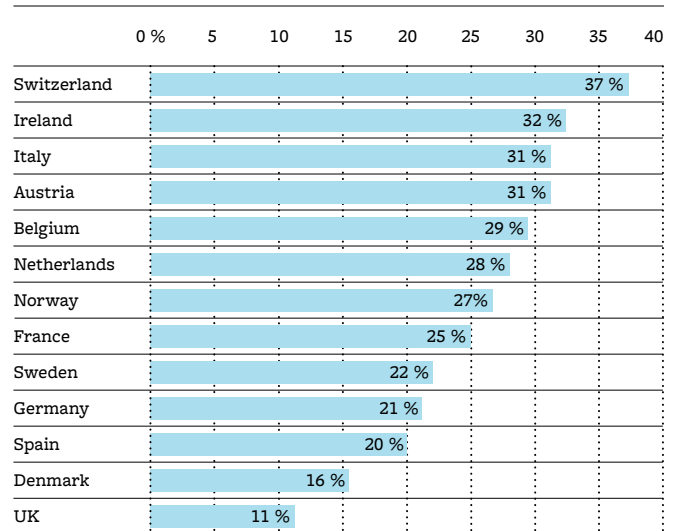


Figure 8: Acceptance of direct financial support for commercial media in international comparison

The chart shows for Switzerland and the reference countries the proportion of respondents who are in favour of the government supporting commercial news media outlets who can no longer make enough money on their own (source: Reuters Institute, 2021).

Reading example: In Switzerland, 37% of respondents say the government should financially support private media. In the UK, this figure is 11%.

again evident in the print sector, which in 2020 still comes to CHF 727 million in total revenues. Advertising revenues in the TV market fell by CHF 88 million (-13%) to CHF 616 million. Of all the media sectors, radio suffered the biggest drop in percentage terms (-27%), with a fall of CHF 39 million on total revenues of CHF 105 million. For the first time since the start of the 2014 survey, revenues from the online advertising market were also down. Compared to the previous year, the online advertising revenues of Swiss media providers fell by CHF 56 million (-11%) and now amount to CHF 462 million. This is another indication that advertising money is flowing to the international tech companies Google and Facebook.

Against this backdrop, the slightly growing willingness to pay for online news is positive. Between 2019 and the coronavirus year 2020, it increased by four percentage points in Switzerland and currently stands at 17%. This shows that willingness to pay is more likely to be present when the media clearly offer a prioritisation and weighting of arguments

when covering political or social issues. The reason for this could be that at least part of the audience has a need for background reporting and reduction of complexity, and these are recognised as clear added value. Willingness to pay for news is therefore most likely to exist where events are contextualised on the basis of in-depth research or (for users with political expectations) where media coverage follows a clear editorial line.

Despite the economic crisis in journalism, none of the five large private Swiss media companies (TX Group, Ringier, NZZ, AZ Medien, CH Media) has reported a loss since 2015. They were therefore profitable as a whole, including in the coronavirus year, but with significant state support payments such as short-time working compensation. Swiss media companies have developed business areas outside of journalism that yield profits. However, new investments in journalism remain the exception. It is noteworthy that the actual economic development of journalism diverges from the perception of the population. Thus, 54% of the Swiss population are not at all or only slightly concerned about the financial situation of the media. Nevertheless, 37% of those surveyed are of the opinion that the state should finance private media if they get into financial difficulties (cf. Figure 8). That is by no means a majority – but in comparison with the other 12 reference countries, Switzerland occupies the top position.

2.5 Media content concentration is continuing apace

The economic crisis of information journalism is leading to highly concentrated media markets in Switzerland. A few media companies own most of the high-reach news media (Publicom, 2020). Concentration is highest in the broadcasting market, a politically desired outcome with the SRG SSR being the clearly dominant company in the radio and television sector. Many new outlets have emerged in the online sector. However, a small number of major media brands such as *zomin.ch*, *blick.ch* and *srf.ch* account for the majority of usage. In the press market, too, a high degree of concentration can be observed in the three major language regions.

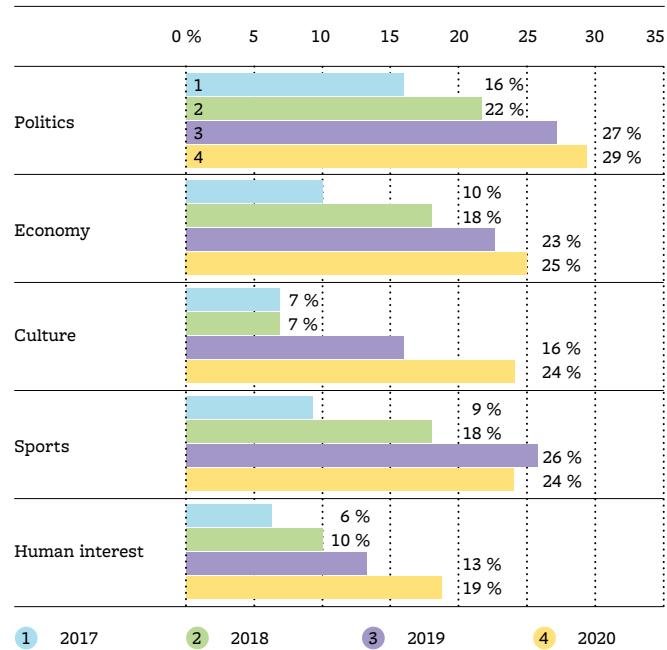


Figure 9: Media content concentration in press market in German-speaking Switzerland by subject area

The chart shows the development of content media concentration in the press market of German-speaking Switzerland by topic area. The percentages of shared editorial contributions are shown.

Reading example: The share of shared news items in media coverage about politics was 29% in 2020. The value has increased by 13 percentage points since 2017.

In the press market of German-speaking Switzerland, media content concentration is increasing (Vogler et al., 2020). From 2017 to 2020, the proportion of shared articles increased from 10% to 25%. In 2020, the highest content concentration was in political reporting with 29% (cf. Figure 9). For economy (25%), culture (24%) and sports (24%), the concentration was slightly lower. In reporting on human-interest topics, it was lowest at 19%. In all subject areas, except for sports, the concentration of content became more accentuated from 2019 to 2020. The increase was most pronounced in culture reporting (+8 pp) and in human interest reporting (+6 pp). In the area of opinion articles, which are particularly sensitive from the perspective of democratic theory, media content concentration also increased. The number of shared editorials, commentaries and reviews rose from 8% to 23% in the press

market in German-speaking Switzerland from 2017 to 2020. Regional news coverage is currently still independent in the network systems. Consequently, media content concentration remains low in regional reporting. However, the TX Group has already announced that it will also introduce centralized newsrooms at the regional level. It can thus be assumed that the problem of media content concentration will extend to regional news coverage and further intensify concentration in the media market.

Content created by news media plays an extremely important role on social media. A remarkable 60% of all shared sources in the *Twittersphere* lead to news media from Switzerland or abroad. A further 23% of URLs lead to specialist or specialised media. 16% of URLs reference other, non-journalistic sources of information. These include information from authorities, such as the Federal Office of Public Health, content from scientific organisations and independent information platforms, first and foremost *Wikipedia*. Only 2% of the information offered belongs to alternative media. All in all, the information offered on *Twitter*, which is more or less permanently available via URLs, is strongly dominated by journalistic content. This shows that information journalism also plays an absolutely central role on the web and must therefore be protected and supported.

3 Conclusion and action recommendations

The coronavirus pandemic has clearly demonstrated the importance of information journalism, but at the same time it has also strengthened disruptive tendencies, which means a further weakening of news media. Together with the pandemic, the problem of disinformation has definitely arrived in Switzerland. For the first time, many citizens have come into contact with false information or conspiracy theories in their personal networks and often via social media and messenger services such as *WhatsApp*, *Telegram* or *Signal*. Against this backdrop, news media are increasingly seen and supported as defence mechanisms that expose and correct disinformation. Not surprisingly, trust in professional news media has risen markedly in Switzerland. In

contrast, trust in social media and search engines is significantly lower, although they are increasingly used.

User groups which, before the pandemic, had gotten their information mainly from social media have later increasingly sought out news media during the crisis. In their search for reliable information they have, for example, more frequently gotten together again in front of the television screen to watch a news programme. However, this positive change in attitudes towards journalism during the crisis contrasts sharply with the structural conditions, which have deteriorated further for journalism in many dimensions. These include, in particular, media-economic conditions. To fulfil its democratic functions, good journalism needs resources: money, personnel and time. This is confirmed, among other things, by the in-depth study on the representation of women in the Swiss media. The media representation of women is positively influenced by journalistic resources. However, journalism in Switzerland has fewer and fewer resources at its disposal. The willingness to pay for news has indeed slightly increased in Switzerland. However, the current 17% of the Swiss willing to pay for news are in no way enough to finance journalism sustainably on a long-term basis. This is particularly because advertising revenues for journalism have continued to collapse and are flowing to the global tech companies Google and Facebook.

The growing market failure for information journalism requires bolder media policy measures. Direct financial support for the media is required, for journalistic start-ups oriented towards quality journalism in particular. The fact that financial support for the media is indispensable is shown, among other things, by the increasing media concentration in Switzerland. Media content concentration and thus the uniformity of reporting are increasing, for example in media coverage about culture. Journalistic services are being cut back, and instead – for example in the cultural sector – it is associations and other interest groups which disseminate information with their own portals. In this sense, there is a problematic shift away from journalism towards portals that function as PR, which try to fill the «gaps» left by journalism.

Precisely because diversity is threatened by these consolidation processes and PR influences,

financial support for the media should not be made available for few large companies, but it should also support many small providers that contribute to the diversity of perspectives and to an informed citizenry. State-of-the-art financial support for the media should also take into account changing consumer habits, such as emergent media consumption. At a time when users increasingly rely on a wide variety of sources instead of bundled supply by a news outlet, more attention should be paid to the quality of users' information repertoires overall. In this light, it would make sense for media funding to include users (cf. our recommendation for a «Spotify for journalism» in the last Yearbook).

The conditions for a more active financial support for the media in Switzerland are good: by international comparison, public support for media subsidies in Switzerland is relatively high. The cantons could also take on a stronger role here in order to test innovative models. Cantons are credible authorities for this, especially when it comes to regional media diversity. However, they should limit themselves to their role as promoters of independent journalism and not seek to compensate for the loss of journalism by expanding their own communication channels. Channels of public institutions and bodies such as the cantons remain ultimately interest-driven, and cannot and must not replace journalism, not only for the simple reason that this would weaken the fourth estate or control function of the public sphere in the regions. This is why media autonomy must be guaranteed. The fact that media autonomy is possible despite direct financial support for the media has been demonstrated for many years by the Scandinavian countries. These countries have much bolder media policy and have nevertheless been ranked at the top of Reporters Without Borders' surveys of media freedom and media independence for years (Reporters Without Borders, 2021).

A goal-oriented media policy in Switzerland also means directing media policy discourse towards the really pressing issues. This discourse should acknowledge the role of global platforms in transforming the media and the public sphere. Hence, it should develop solutions that counter the financial weakening of journalism in Switzerland as a result of this global «platformisation». Against this background, it is counterproductive to intensify conflicts with

public service broadcasting, as is beginning to happen with politicians' announcement of a «No Billag Light» initiative. At a time when journalism suffers financially, all media which serve the public must be strengthened, not weakened. This not only includes public service media but also private, commercial media, which should be supported more for their service to the general public.

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Sources and methods

The analyses of the Yearbook were based on primary and secondary data. The various sources are listed below by methodological approach.

Content analysis

The quality of media coverage was measured using content analysis conducted at the fög Research Center for the Public Sphere and Society/University of Zurich. A quality scoring system was used, with each news story being coded by trained coders according to scientific standards (no automated content analyses). The random sample from 2020 included 18'695 news items from 60 Swiss news outlets.

Audience surveys

The Yearbook mainly uses two surveys. First, data from the *Reuters Institute Digital News Report* was again included this year. The global report contains representative survey data on digital news consumption behaviour (over 90'000 interviews) of the population in 46 countries, including Switzerland. The fög is the Swiss partner organisation of this major study, which is conducted by the Reuters Institute for the Study of Journalism at the University of Oxford. In Switzerland, around 2'000 internet users in German-speaking and French-speaking Switzerland were surveyed. On the basis of online panels, samples were drawn which are representative of internet users aged 18 and over. Second, survey data from an annual representative media usage study carried out by the fög in collaboration with GfK Switzerland was used. In this survey, around 3'400 online interviews have been conducted since 2009, at the beginning of each year.

Key figures from the media industry

Data on news outlets' reach and media concentration in media markets were based on circulation figures or reach measures of the media research organisations WEMF and NET-Metrix. The data on media revenues came from the Stiftung Werbe-statistik Schweiz (Swiss Advertising Statistics Foundation).

What is the purpose of the Yearbook?

Since it was first published in 2010, the aim of the Yearbook has been to broaden the discussion about media quality and to increase the awareness of what journalism achieves in the society. The Yearbook is meant as a resource for media professionals, political and economic actors, academia and all those who are interested in the development of the news media and their structures, audiences and contents. The impetus for the Yearbook is the insight that the quality of democracy depends on the quality of the media. With the Yearbook, we want to give the citizens a yardstick for judging what kind of journalism they want to expose themselves to, we want to provide benchmarks that media managers and journalists can use to reflect on the kind of journalism they want to produce and be responsible for, and we want to help politicians gain insights into how the Swiss media system is developing and which resources are available to journalism in Switzerland.

Our concept of quality

This Yearbook is based on a normative understanding of quality, which assumes that the news media plays an important role for society in a functioning democracy. Four quality dimensions can be derived from the performance functions of public communication, which are widely anchored both in academic research and journalistic practice. First, the *relevance* dimension provides information about how much hard news there is compared to soft news, as well as about the importance of news items about institutional processes compared to news items focused on persons.

The *diversity* quality dimension determines whether events are reported from a variety of content-related and geographical perspectives. In the *contextualisation* dimension, quality is high when current events are embedded in longer-term developments and thematic contexts. Finally, the *professionalism* quality dimension determines whether the media coverage is factual and originates from the editorial staff itself, and measures the extent to the news sources and authorship are made transparent.

Who is responsible for the Yearbook?

The Yearbook is developed and published by the fög Research Center for the Public Sphere and Society/University of Zurich (www.foeg.uzh.ch). Eight scientific and four student staff members are involved in the research and guarantee the high quality of the analyses.

Who finances and supports the Yearbook?

The Yearbook is financed by the non-profit Kurt Imhof Foundation for Media Quality (www.kurtimhof-stiftung.ch) and the University of Zurich. The foundation board is composed of Christoph Degen, Christine Egerszegi-Obrist, Mark Eisenegger, Barbara Käch, Yves Kugelmann, Ulrich E. Gut, Christina Leutwyler, Maude Rivière and Nenad Stojanović. The Foundation receives funding for the project from the following donors: Alliance F/Foundation Mercator Switzerland, Avenir Foundation, Federal Office of Communications (OFCOM), Bote der Urschweiz, ch-intercultur, CH Media, Die Schweizerische Post AG, Eidgenössische Kommission gegen Rassismus (EKR), Ernst Göhner Foundation, Fondazione per il Corriere del Ticino, Gottfried und Ursula Schäppi-Jecklin Foundation, Migros Kulturprozent, NZZ, Paul Schiller Foundation, Ringier AG, Somedia AG, SRG SSR, Swisscom, Swisslife Foundation Perspektiven, Verband Medien mit Zukunft, Zürcher Kantonalbank and various individual donors.

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Contact: fög Research Center for the Public Sphere and Society/University of Zurich, Andreasstrasse 15, CH-8050 Zurich. Tel.: +41 44 635 21 11. E-mail: kontakt@foeg.uzh.ch

Where can the Yearbook and related studies be found?

The Yearbook is available in print (ISBN 978-3-7965-4431-6) from Schwabe Verlag (www.schwabe.ch) and is published every fall. In addition, a freely accessible PDF of the *Yearbook Quality of the Media* is available at www.foeg.uzh.ch. The in-depth studies on media quality that are part of the Yearbook are also published separately as PDFs and focus on specific media quality-related topics.

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Research Center for the
Public Sphere and Society
(fög)/University of Zurich

Contact

fög/University of Zurich
Andreasstrasse 15
CH-8050 Zürich

kontakt@foeg.uzh.ch
+41 (0)44 635 21 11
www.foeg.uzh.ch
