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# Yearbook 2020

# The Quality of the Media

# Main Findings

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The Swiss Media under the Spell  
of the Coronavirus Crisis

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# Main Findings – The Swiss Media under the Spell of the Coronavirus Crisis

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## Summary

The world, Switzerland and the Swiss media are under the spell of the coronavirus crisis. The effects of the pandemic can be seen in all the dimensions examined in this Yearbook. On the one hand, they show several positive findings for journalism. There is more interest in and more use of professional journalism, at times even among young people who otherwise generally have less affinity with news. There is also a relatively high level of media quality. On the other hand, however, the precarious financial situation of journalism in Switzerland is clearly evident. The transformation of the Swiss media and the overall public sphere described in last year's Yearbook (fög, 2019) as a consequence of tech companies' rise has been further accentuated in the coronavirus crisis. In the current "corona year", *Google* has recorded a slight decline in sales for the first time, and *Facebook* has also grown at a slower pace. However, in view of the global recession, the tech platforms have clearly "outperformed" (Maron, 2020). This stands in contrast with the field of journalism, where many firms have seen a marked decline in advertising revenues and have had to introduce the scheme of short-time work and request state support. All the major Swiss media companies have announced or have already implemented further cost-cutting measures and budget reductions. The operations of some news media, such as *Micro*, *CNN Money Switzerland* and *Le Régional*, have had to be discontinued, and other news media have merged sections or intend to focus more on automation in the future. The models of the platform companies are thus increasingly becoming the yardstick for the future viability of news media organisations. The number of users of news media did go up, the access to news content increased and more digital subscriptions were sold. However, during the coronavirus crisis, the digital growth generated by paying users has not been able to compensate for the slump in advertising revenues. The global tech platforms from Silicon Valley have thus further consolidated their market power and dominant position overall during the crisis while the system-relevant, professional news media have worked well in terms of media quality but have lost further structural ground.

In the current situation, this year's edition of the Yearbook focuses on the coronavirus crisis but does not stop there. Of the six in-depth studies, three related directly to the coronavirus issue. While the first study took stock of the quality of Swiss media coverage during the coronavirus crisis, the second study dealt with the communication dynamics on the pandemic in social media (i.e. in the *Twitter* sphere). The third study examined what media and information usage behaviour looks like in an exceptional situation such as the current coronavirus crisis.

The three other analyses dealt with more long-term topics. One traditional focus of the Yearbook has been the so-called repertoire research. This approach provides information about the different news media typically used by people. In a qualitative way, we took an in-depth look at the group of young adults. More precisely, in this fourth study, we examined young adults' media environments especially during the coronavirus pandemic, and showed how these users can be won over for journalism. The fifth study showed how people's media diets affect their perception of issues. Finally, in the sixth study, we looked at the development and quality of science reporting. This issue is particularly relevant in the context of the coronavirus pandemic as the crisis has clearly demonstrated the importance of science journalism.

Here, we summarise the main findings of the six studies as well as the Yearbook's findings on the development of media quality, media use, the attitudes of the Swiss population towards journalism and tech platforms, the perception of the problem of disinformation, the financial situation of the Swiss news media, and media concentration. This summary concludes with action recommendations.

## 1 Studies on the coronavirus pandemic

### 1.1 Quality of media coverage about coronavirus: good but with shortcomings

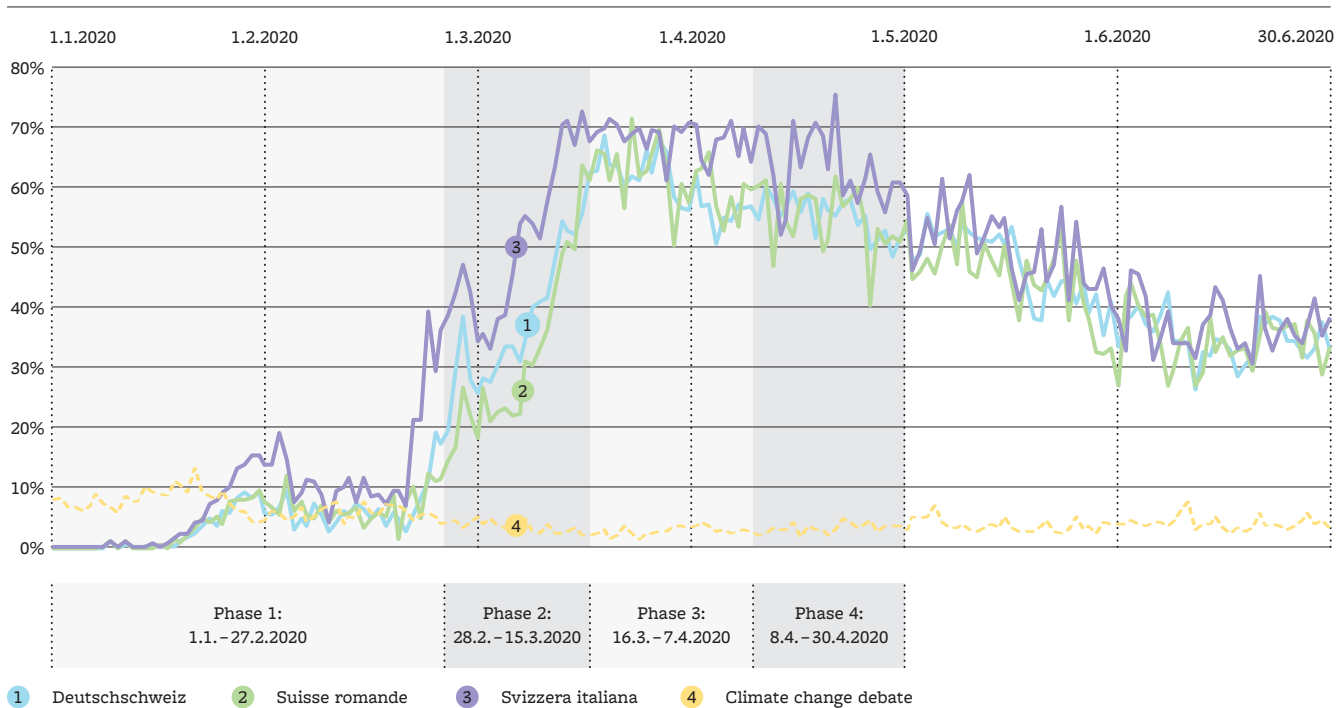
**N**ews media have a decisive influence on the construction of social crises. They influence how threatening a situation appears, how great the political pressure to act is or to what extent the population is prepared to follow certain measures. Because of this, we set out to examine the actual quality of media coverage in the current coronavirus crisis. Our study based on quantitative manual content analyses for the period up to the end of April 2020 (and with an automated content analysis up to June 2020) revealed that the performance of the Swiss news media during the pandemic has been relatively good (Eisenegger et al., 2020), particularly considering the difficult working conditions and the loss of income for journalism firms. The first positive aspect is that the media coverage was relevant: the Swiss news media did not focus on individual cases but tended to focus on the consequences for the society as a whole. Second, there was a diversity of topics: the Swiss news media examined the pandemic from different thematic perspectives. In addition to the medical aspects, they also discussed the political and economic implications of the crisis. Third, the media cannot be accused of sounding alarm bells too loud and of overly dramatising: even in tabloids and tabloid-like commuter media, the media coverage was mostly factual. There was no panic mongering.

However, our study also showed clear shortcomings. The coronavirus issue has dominated journalistic reporting like no other event (see Figure 1). Up to 70% of the media reports made reference to the virus, be it as the main focus or in passing. As a result, other important issues were pushed down the agenda in the first half of 2020. The issue of climate change, which had shaped the 2019 election year, lost much attention within the time span that we analysed. While the media coverage about the coronavirus issue was quite diverse in terms of thematic perspectives, the diversity beyond the said issue suffered considerably. We also have to criticise the news media's handling of the numbers and statistics. Although certain news media did a good job in this

respect, overall, the statistics and figures were not sufficiently put into context and were not handled with sufficient critical distance. Several media often used “naked figures and statistics” without further explanation or contextualisation.

Various critics have accused the Swiss news media of being too benevolent towards the authorities and governments, which were given special powers during the crisis. Our study did not confirm this. On the whole, the news media we analysed kept a critical distance from the authorities. However, our study revealed the news media's noticeably less critical attitude in the sensitive phase shortly before the lockdown in mid-March. Leading up to the lockdown, there was no critical examination of such relatively drastic measure, for example by comparing it with countries such as Italy, where a lockdown had been imposed much earlier. In this regard, the news media helped pave the way for and legitimise the lockdown in Switzerland.

In addition, the journalists' contextualisation during the crisis was generally insufficient. The news media largely confined themselves to commenting on the events. Thorough investigations and in-depth analyses of the causes and consequences of the crisis and the measures taken remained marginal. Strikingly, there was also a great dependence on external sources (i.e. expert opinions). More than 80% of the news items made a prominent reference to an expert. This shows that journalism has lost much of its power to contextualise events with the remaining resources it currently has. The reduction of science journalism, which was even continued in some news departments while the coronavirus crisis went on, is taking its toll. Finally, we also have to criticise the diversity of scientific experts included in the coronavirus media coverage. The vast majority of scientific experts quoted in the news reports came from the medical field of virology, epidemiology or immunology. Experts from other disciplines, such as economics, law or social sciences, did not receive much attention. This is remarkable because the coronavirus crisis has had consequences far beyond the medical aspects, and not only since the lockdown. We also noticed that the scientific experts differed greatly depending on the language region. This shows that there has been little discourse across Switzerland's language regions (see Figure 2).



**Figure 1: Daily share of news items with reference to coronavirus by language region**

The chart shows the share of news items with at least one reference to coronavirus or the coronavirus (n = 100,612) in the total coverage of the media examined (n = 308,616) by language region (media sample for automated content analysis). As a reference value, the share of reporting with reference to the climate change debate was used (n = 14,334). Phases refer to periods used to interpret findings from the manual content analysis.

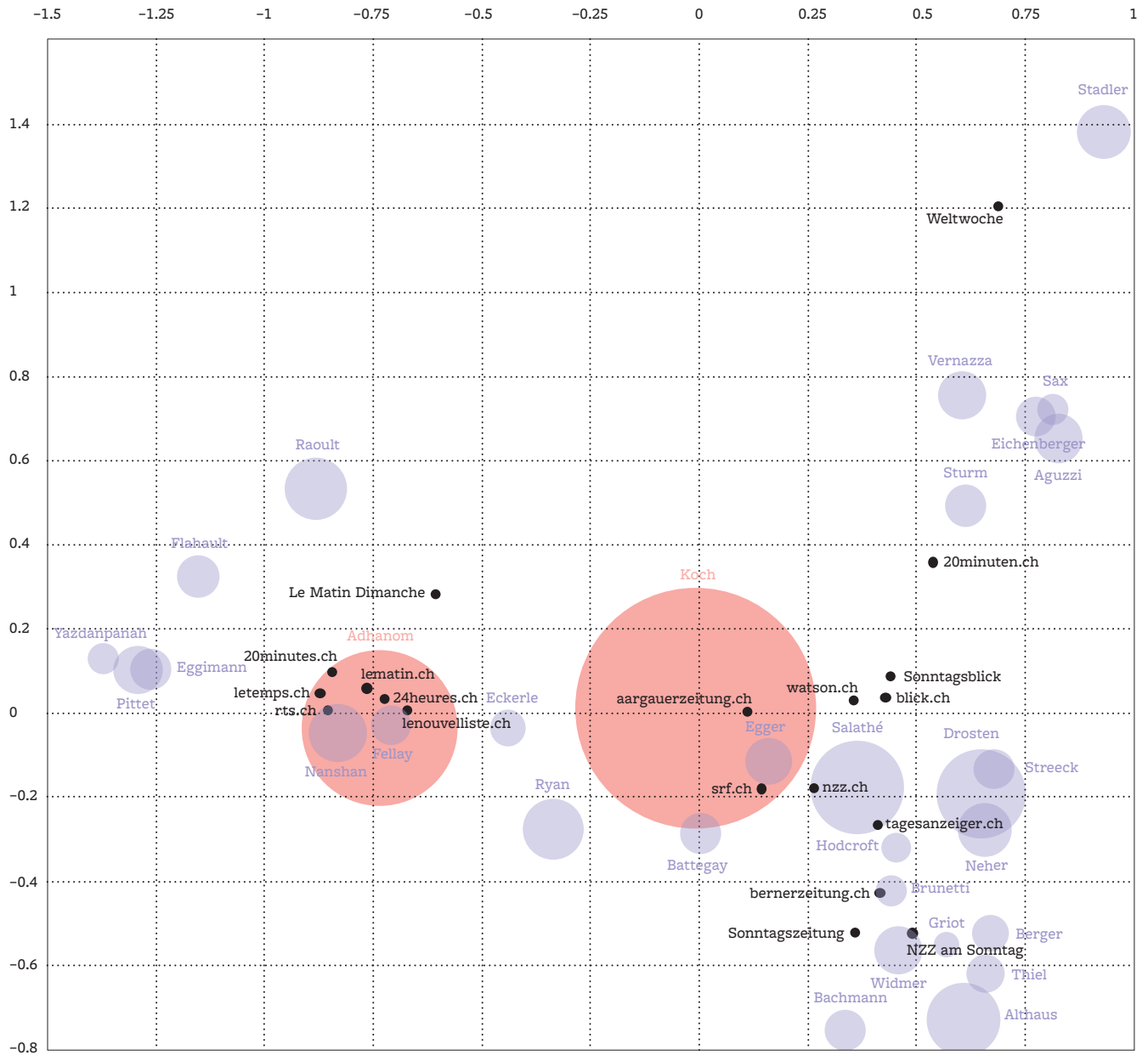
*Reading example:* In the Svizzera italiana, the share of news items with reference to coronavirus was highest on April 21, 2020, at 75%.

Apart from commonalities, there were also noticeable differences, such as that the quality of the coronavirus pandemic media coverage differed by media type. Subscription newspapers and public radio stood out positively, with a particularly high diversity of topics, greater relevance and more background reporting. In our study, we did not find any support for the oft-heard claim that public broadcasting was too close to the state. On the contrary, public broadcasting as well as the Sunday and weekly papers showed the greatest critical distance from state actors. Tabloid and commuter media also worked well, at least in some quality dimensions. These media types also tried to retain their objectivity, and our study did not find much alarmism and panic mongering in them. Finally, the news media from the different language regions in Switzerland

showed interesting patterns. Compared to the German-speaking regions of Switzerland, the news outlets from the French-speaking regions showed less critical distance from the authorities.

## 1.2 Established actors shape the debate on the coronavirus pandemic in social media

The coronavirus pandemic also shaped what was going on in the social media in Switzerland. This was confirmed by our study on the communication dynamics in the Swiss Twitter sphere, which was based on 1.7 million tweets from January 1 to April 30, 2020 (Rauchfleisch et al., 2020). Of the active Swiss Twitter users, almost 60% participated to a greater or



**Figure 2: Media attention to scientists on the coronavirus pandemic**

The graph illustrates the media attention to scientists in individual news outlets in phases 1 to 4 (excluding radio and TV broadcasts). The size of the bubble shows how often a person was discussed in media coverage overall (number of news items). The positions of the scientist and the news outlet in the graph show the relative importance of the scientist in the media coverage of the respective news outlets. The closer the position of the scientist to that of the news outlet, the more exclusively he or she found attention in a news outlet. The further away an observation is from the origin of the coordinate system, the more it differs from the average. The X-axis is determined by the language region; the Y-axis by media type. The values were determined through correspondence analysis.

*Reading example:* Beda Stadler received attention comparatively often in *Weltwoche*. In comparison to other scientists, he found relatively high attention.

lesser extent in the public discourse on the coronavirus issue; that is, they expressed their own views on the issue or reacted to contents thereon. In a study of last year's Yearbook, we had found that the traditional hierarchy of opinion leaders is partly turned upside down on *Twitter* (Vogler et al., 2019). As a rule, civil society actors and private individuals as well as political interest groups now shape the agenda in the *Twitter* sphere more than journalism does. However, this finding was not confirmed during the coronavirus crisis. The traditional opinion leaders (i.e. professional journalists and authorities), such as the Federal Office of Public Health (FOPH) or the Federal Council, have had the greatest influence on the *Twitter* discourse during the crisis. In these times of great uncertainty and increased need for information, the traditional news media and established (political) players are regaining ground in social media (see Figure 3–5).

In the discourse on coronavirus, disinformation did not play a prominent role among the Swiss *Twitter* users. This became clear through a deep dive of *Twitter* discourses with disinformation potential, such as the discussion about the 5G antennae, which allegedly contribute to the spread of coronavirus, or about coronavirus as a biological weapon that was developed in a laboratory in Wuhan. Our analysis showed that the Swiss *Twitter* community is reluctant to engage with such disinformation and hardly disseminates it at all.

For a more valid assessment of the problem of disinformation, however, further studies are necessary. There are indications that messenger services such as *WhatsApp* are playing a serious role in the spread of disinformation (Eisenegger, 2019; Reuters Institute, 2019). One reason for this is that such messenger services support private communication, which is not accessible to critical observers from outside.

- 1.3 Public authorities and public broadcasting: the most important sources of information during the coronavirus crisis

Traditional journalism worked well during the coronavirus crisis. This was also suggested by

the study on media usage behaviour during the crisis (Friemel et al., 2020). The survey respondents from the German-speaking region of Switzerland rated the importance of the federal government's information channels as the most important, followed by the news programs of public broadcasters and news outlets of the private media companies in Switzerland. Social media platforms such as *Facebook*, *Instagram* and *Twitter* are clearly considered less important by the Swiss respondents. This confirms the finding that in times of crisis, traditional sources of information are in greater demand. Similar to the findings on the quality of media coverage, people also noted shortcomings with regard to how the media handled the coronavirus issue. A large majority of the Swiss population already felt at the beginning of the lockdown that the pandemic had been discussed too much (see Figure 6). An "overload" is perceived when an issue receives up to 70% of the media coverage, which has been true of the coronavirus issue on some days. As for the tone of the coronavirus media coverage, it was judged by a majority of the interviewees as adequate. The people's judgement of social media was more critical, though: half of the respondents said that social media dramatised the issue, but 14% were of the opinion that social media played down the situation. This confirms the finding that the discourse on the social media platforms is generally more emotional and polarising compared to that in the traditional news media (Papacharissi, 2016).

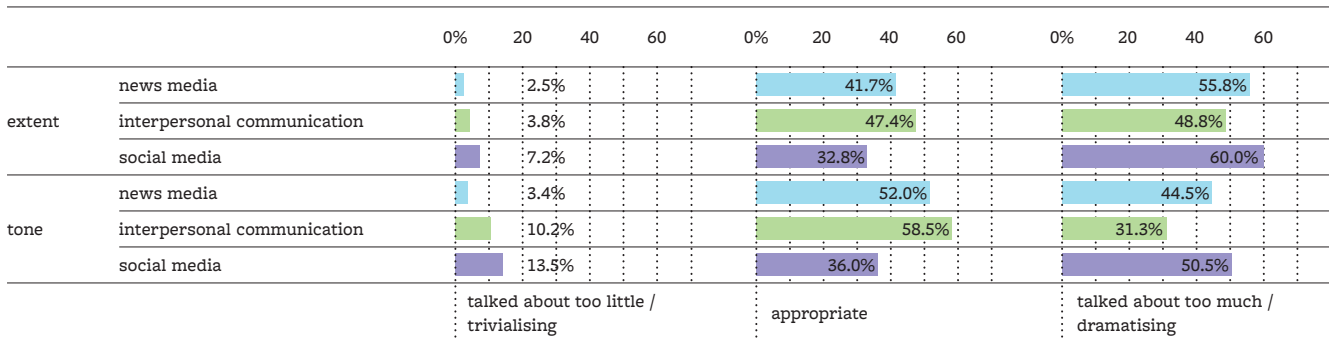
## 2 Further Studies

### 2.1 Young adults are not lost to journalism

Within the period from 2009 to 2020, the group of the so-called news deprived grew from 21% to 37% (see Figure 10). At 54.6%, their share is particularly high in the age group of young adults. News-deprived users are those people who use news media clearly below average (compared to all other user groups) and who are thus at a higher risk of being undersupplied with news. Hence, we were particularly interested in that group and conducted a qualitative study to better examine the media and information usage behaviour of 19 Swiss people between 20 and 25 years of age (Schwaiger et al., 2020).







**Figure 6: Evaluation of the thematisation (extent and tone) of the coronavirus crisis**

The figure shows the different proportions in percent for the evaluation of the volume and tone. The data are based on the respective valid responses (news media: n = 990; interpersonal communication: n = 937; social media: n = 430). For this evaluation, the answers based on the 7-point scale were summarised as follows: 1-3 (“talked about too little / trivialising”), 4 (“appropriate”) and 5-7 (“talked about too much / dramatising”).

*Reading example:* More than half of the interviewees think that the coronavirus crisis is being discussed too much in the news media (55.8%) and in social media (60.0%).

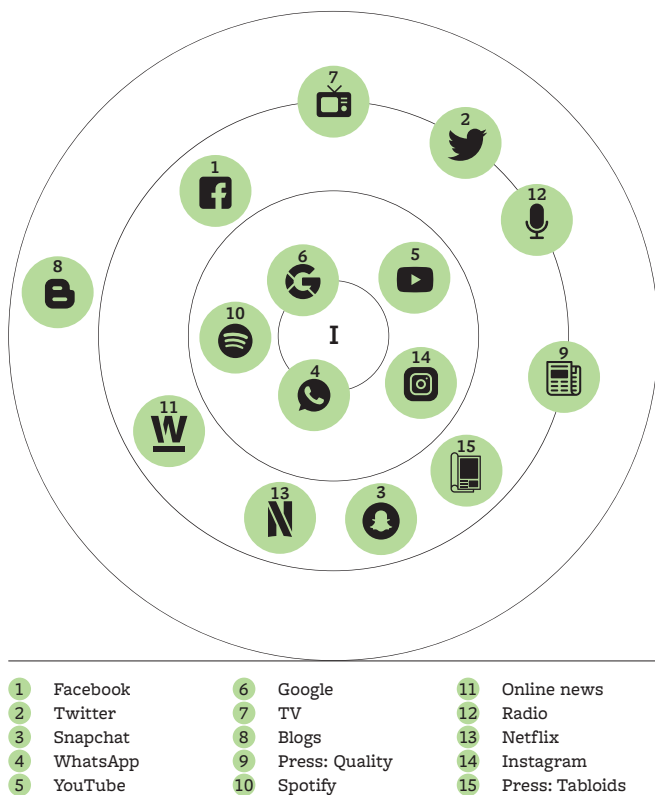
The aim of the study was to trace the causes of the specific media behaviour of young adults and to show how they could start to develop more interest in news.

According to the study results, the study participants actually have a precise idea of what *news* means, namely relevant information on current world events. As a rule, news reaches young adults by chance, via the social media platforms on their smartphones. Seeing news is thus an incidental by-product of their social media use. For young people to actively engage with news, their own personal and social networks are crucial. Young users become aware of news almost exclusively when their friends or acquaintances share news items with them. The family also plays an important role in this context: face-to-face conversations at home about news are important in stimulating young users' interest in news as they want to be informed about the current issues.

Young people's interest in news is strongly influenced by personal factors: news is used mainly when it is shared within one's personal network, both online and offline, and such news can come from public figures (influencers) or from private individuals. This is the kind of news that young people can relate to in their personal lives. More generally, news becomes interesting to young adults if it is a

means of maintaining one's own identity and community. In this sense, the news that young adults use and share should fit their own identity and the community with which they identify. For young adults, news has value if it can attract attention in social media; that is, if it has the potential to increase their social network capital. If this is the case, the young-adults user group may well start actively searching for additional news. In this respect, young adults, especially those who can be classified as “news deprived”, are by no means lost to journalism. Issues and communication events with mobilisation character (e.g., Fridays for Future or #MeToo), which have the potential to activate their own community, and personalised issues with identification potential, can quite strongly animate the examined group of young adults' news consumption. Young adults also show more interest in news if they feel that they will miss out on something in their own community or cannot be part of a conversation on issues if they do not engage with news.

A connection to news, however, does not mean a stable connection to traditional media for the group of young adults because the so-called emergent-media consumption is typical among them (fög, 2020). Many young adults no longer use specific media outlets in their entirety. Instead, in social media, they get a highly dynamic personal news



**Figure 7: Frequency of use of media channels**

The illustration shows the frequency of use of different media channels among the 20- to 25-year-old study participants. The closer a channel is to the centre of the circle, the more frequently it is used.

*Reading example:* The platforms *YouTube*, *Instagram*, *WhatsApp* and *Google* are especially frequently used by young adults.

bundle from a wide variety of sources. When selecting from this news stream what articles to read in depth, young adults rely heavily on their individual interests and the characteristics of a news item, particularly the headlines and images. With this behaviour, the users in our study thus react to how news organisations package the news, for instance through “clickbaiting”.

Our study also confirmed that young adults express a low willingness to pay for news. They also strongly criticise paywalls. Having free access to relevant articles is considered a basic right by the

study participants. They would be willing to pay only if a platform offered media content from a wide variety of sources at a low flat rate. Thus, this user group is strongly oriented towards bundled services such as *Spotify*.

When studying young adults, we see that “messengerization” (Eisenegger, 2019, p. 12) is very important (see Figure 7): news articles often reach young adults via messenger services such as *WhatsApp*. In that user group, we therefore notice a shift in the social discourse away from public platforms and towards private platforms. However, the publicly available social media platforms *YouTube* and *Instagram* are still the most important channels for news consumption. They both rely on images, video and sound, which is important because in the eyes of the young adults the audiovisual packaging of news is a crucial element for news accessibility and for stimulating user interest. Although social media channels are much more frequently used than other channels, the traditional media channels (i.e. TV, radio and print) are clearly considered more credible. Users justify this assessment by pointing at news media’s higher quality and better compliance with journalistic standards. This justification further underlines the fact that the examined user group of young adults does reflect the media behaviour and attitudes of young adults in general.

As the study was conducted in the midst of the coronavirus pandemic, our findings also relate to the specific nature of media usage behaviour during a crisis. For instance, the study confirmed the “corona bump” described in the literature (Kalogeropoulos, 2020). During the coronavirus crisis, the young-adults user group increasingly turned to traditional news media. However, this effect does not last. As young adults perceive a flood of information on the coronavirus issue, they soon show a below-average interest in news again.

## 2.2 “News deprived”: issues with movement character more prominent

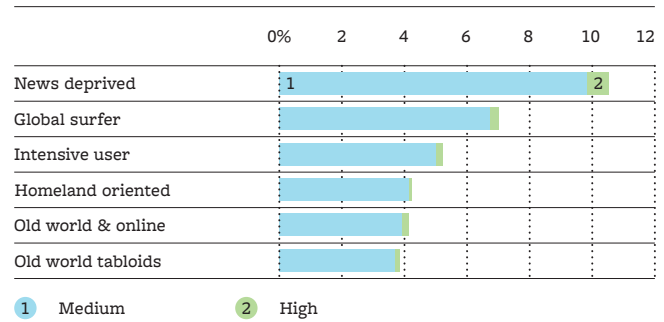
In this study, we wanted to know how the personal media diets of different user groups, the so-called news repertoires, affect their perception of issues (see Chapter 2.1). With regard to the news repertoire

of the “news deprived” characterised by below-average news consumption and a strong focus on social media, the study showed clear patterns: for this user group, complex sociopolitical issues are lower on the agenda. Instead, soft news and news about emotionalised and threatening issues are much higher on the agenda. Users devote more attention to communication events with mobilising character, such as the #MeToo debate or the Fridays for Future issue. This is in line with the results of the qualitative study, which found that young adults with predominant social media use follow these issues comparatively intensively (Schneider & Eisenegger, 2020). This study on news repertoires, which was based on a quantitative, standardised survey, also underlined the fact that the “news-deprived” group can be reached with journalistic content provided that the issues have mobilising potential, offer opportunities for identification and can possibly meet with a response in the users’ respective social networks (see Figure 8). The “news deprived” are therefore by no means intentional news avoiders lost to journalism. For news media to stimulate such group’s interest in news, they have to make their content connectable to everyday life, and they have to make sure that the users will see the advantage of sharing news in their respective social networks for their identity and relationship management.

The study also revealed important findings about other news repertoire types. The group of “global surfers”, who are educated, carry professional responsibility and are critically reflective when using digital media, are far less interested in Swiss topics (e.g. referenda) despite their affinity with political and economic issues. This is a problem for Switzerland’s democracy, especially because the “global surfers”, together with the “news deprived”, have news repertoires that are among those that have grown most in recent years. In the current year (2020), more than 60% of all the examined users fall under either of these two groups.

### 2.3 Science journalism: important but neglected

Scientific knowledge is shaping today’s society more than ever. This is what the coronavirus



**Figure 8: Communication events with movement character in the issue agendas of different news repertoire types**

The graph shows the extent to which the perceived communication events on the personal agenda have a movement character (n = 41,118 respondents in the years 2009 to 2020). Due to the pre-selection of 20 high-attention communication events in the previous year, the variance of the share values is limited. This explains why even small differences in the percentages are important and statistically significant.

*Reading example:* The “news-deprived” group has the highest share of communication events with a medium- or high-movement character on its agenda (10.5%).

crisis has once again shown us very clearly. In this context, news media are the most important source of scientific knowledge for the Swiss population. Despite its importance, however, science journalism is a niche sector. It is struggling with declining resources and an increasing dependence on PR communication from universities. Against this backdrop, our study examined the significance and quality of science reporting in the Swiss online, press, radio and television media within the period from 2015 to 2019 (i.e. before the coronavirus crisis) using the quality indicators of the Yearbook (Vogler & Schäfer, 2020).

The analysis confirmed the low significance of science journalism in the Swiss media. Although the proportion of articles focusing on science has remained stable over the five years that we examined, it averages only 2.1% of all the articles. The fact that only a few high-quality media outlets still have a differentiated science section mirrors this low significance. The importance of science journalism also differs by media channel. The volume of news items on science is declining in the print sector, remains stable in the broadcast sector, and is increasing in the

Year	Share of contextualisation	Share of emotionality	Share of relation to Switzerland
2015	36.4%	2.4%	38.1%
2016	21.4%	4.4%	32.7%
2017	18.0%	1.9%	31.2%
2018	10.9%	5.2%	34.0%
2019	13.5%	5.4%	36.3%
Total	20.0%	3.9%	33.7%

**Table 1: Quality aspects of science journalism in annual comparison**

The table shows how the quality aspects of contextualisation, emotionality and relation to Switzerland (regional and national reference areas) have developed over the years in media coverage.

*Reading example:* In 2019, only 13.5% of the news items were contextualised. In 2015, the share was 36.4%.

online sector, but the increase in science journalism in the online sector is mainly due to agency reports.

With regard to the quality of media coverage of news items on science, we observed a significant decrease of contextualisation over the years. While in 2015 36.4% of the news items offered contextualisation, in 2019 only 13.5% did (see Table 1). Contextualisation is mostly provided by public broadcasting (34%), Sunday newspapers and magazines (32%) and the news sites of subscription newspapers (23%). Conversely, the news sites of the tabloid and commuter media have low contextualisation (9% and 8%, respectively), although they cover science relatively often. The same applies to the websites of SRG SSR, which are the least likely to contextualise scientific topics.

The deficiencies in the area of contextualisation and the general thinning out of science journalism are problematic. It was not only the coronavirus crisis that showed that scientific knowledge is essential. Science as a system also needs a critical competent: an external monitoring authority. Science journalism is indispensable not only for the communication of scientific knowledge to the society but also for its critical contextualisation. This journalistic function is increasingly being questioned, however, due to the growing scarcity of resources in science journalism.

### 3 Further Findings from the Yearbook: Quality of Media

#### 3.1 Media quality: professionalism remains stable, diversity and contextualisation decrease

Overall, two of the four quality dimensions showed sinking quality levels within the period from 2015 to 2019 (fög, 2020). The most significant decrease happened in the diversity dimension. The media we examined now cover a smaller spectrum of topics and geographical areas. This is problematic not only because diversity is decreasing within the individual news outlets but also because it is likewise decreasing in the media arena as a whole. With tight budgets for journalism, media companies are trying to exploit synergies by increasingly sharing news items among themselves (see Chapter 3.5). The recently centralised newsrooms have taken this “media content concentration” to a new level (Vogler et al., 2020). We are therefore observing a dual loss of diversity.

In addition, the media’s contextualisation is also decreasing, although not as much as the diversity dimension is. Reporting that concentrates on background information and investigations is losing weight probably due to scarce resources. Apart from



**Figure 9: Quality scores of the media types**

The diagram shows the quality scores of the 12 media types. The types are ranked in descending order. For each type, it is also indicated whether it deviates positively or negatively from the type average in the four quality dimensions (i.e. relevance, diversity, contextualisation and professionalism). The data are based on all the news items in the quality analysis from the 2019 random sample (n = 21,324; 58 news outlets).

*Reading example:* SRG SSR's news portals take third place in the quality ranking of media types, with 6.7 points. However, in the contextualisation quality dimension, they scored below average.

these negative trends, there is an increase in the level of journalistic interpretation; that is, the media increasingly rely on their own reports instead of agency materials, and tend to comment more often (see Figure 9). In some cases, there is a tendency to replace contextualising news analyses with more opinion pieces. In the professionalism dimension, the news media are improving. The media coverage is predominantly factual and is usually based on professional journalistic standards. In the relevance dimension (i.e. the focus on important hard news), the quality level can also be maintained over the years.

For five of the 12 media types, the measured media quality remains relatively stable. Only in the printed tabloid newspapers is it improving significantly. The media quality, however, is decreasing for several media types that show an above-average media quality in comparison: printed subscription newspapers, Sunday and weekly media and public-radio news programs (see Figure 9).

The comparison of media quality among the different language regions of Switzerland reveals interesting patterns. First, in all three language regions, the media types of public broadcasting, printed subscription newspapers and to some extent the subscription newspaper news sites show above-average levels of quality. Second, for the media types of the Sunday press and weekly magazines, there is no outlet in the Suisse romande whose quality comes close to that of the outlets in the German-speaking region of Switzerland (especially *NZZ am Sonntag*) and in the Svizzera italiana (*Il Caffè*). Third, some media types of below-average quality do not exist in the Suisse romande and above all in the Svizzera italiana. In the Svizzera italiana for example, there are no daily tabloid media, and in the Suisse romande, the tabloid newspaper *Le Matin* has been published only digitally since 2018. Fourth, the media types in the Svizzera italiana differ much less from one another in terms of quality than the media types in the German-speaking region of Switzerland. This also

applies to the Suisse romande, with some limitations: although the quality of the commuter newspaper examined there is lower than the quality of its counterpart in the German-speaking region of Switzerland, the other media types do not differ as much from one another in quality as they do in the German-speaking region of Switzerland.

Above all, even media types with higher quality do not achieve the same high quality in the Suisse romande as in the German-speaking region of Switzerland. In other words, in the Svizzera italiana and to some extent in the Suisse romande, the quality of the news media is “levelled out” while in the German-speaking region of Switzerland the larger market produces a more differentiated set of news outlets with a wider range of media quality (see Udriš et al., 2020).

### 3.2 Media use: no increase in the “news-deprived” group

The development of media use shows that news repertoires that base their media menu primarily on legacy news sources are becoming less important (fög, 2020). Taken together, the news repertoires of the “Old World” account for 26% of the users in the current year (2020) compared with almost 50% in 2009. In contrast, we see continuous growth in the news repertoire types of the “New World”, which primarily use online news websites or news in social media platforms. The shares of the “news deprived” and the “global surfers” increased strongly over the years while that of the “intensive users” is stagnating. Compared to the previous year, however, the proportion of “news-deprived” users remains stable (see Figure 10).

Social media platforms are the most important source of information in the 18- to 24-year-olds group. Compared to the previous year, the proportion of people in this age group who cite social media as their main source of information increased by 9 percentage points. In addition, 26% of the Swiss population consume news in a so-called emergent manner: media brands are no longer accessed directly; instead, algorithmically curated news from various sources are consumed on social media sites or through search engines. This is problematic because

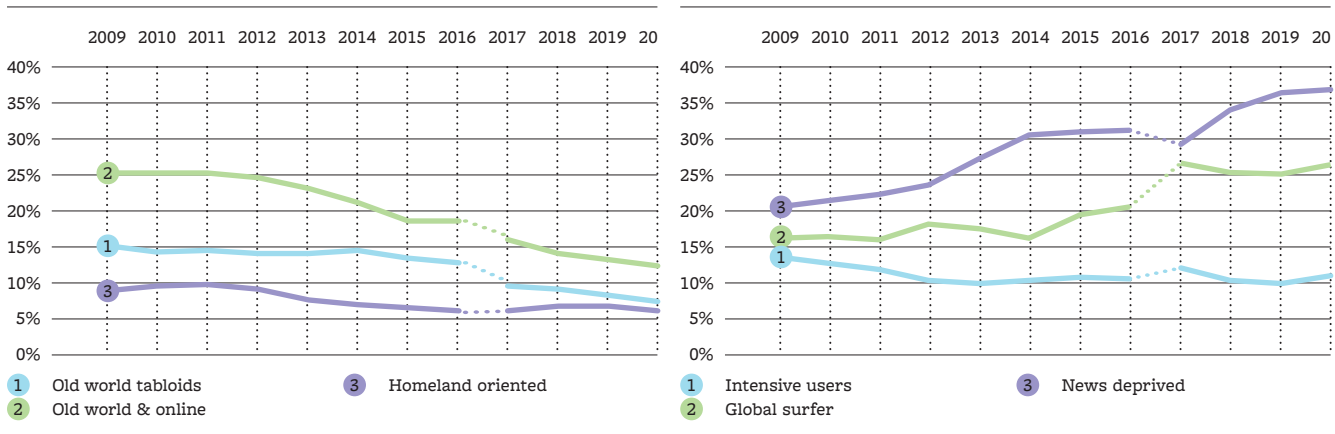
it weakens brand awareness and reduces the willingness to pay (fög, 2019).

The importance of *WhatsApp* is growing among all user groups. The so-called messengerization (Eisenegger, 2019) is becoming more important in Switzerland. This is problematic because the public discourse is increasingly shifting to private forums, which cannot be observed externally. Disinformation tendencies, for instance, are thus rife.

### 3.3 Attitudes: the concerns about disinformation are increasing

About 30% of the Swiss people neither agree nor disagree with the statement that the media can be trusted, and 26% completely deny the statement (fög, 2020). This is shown by data from the Reuters Institute for the Study of Journalism, with which fög, as a Swiss country partner, maintains a cooperation. Nevertheless, these figures still place Switzerland in the top third internationally in terms of media trust. The people’s trust in the news media is therefore comparatively high and is significantly higher than the people’s trust in the news from tech platforms such as *Google* and *Facebook*. However, a large difference is evident between the people’s trust in search engines and the people’s trust in social media. While 29% of the users state that they trust information coming from search engines, the figure for social media is only 19%. The public discussions about fake news and hate speech seem to negatively affect the people’s trust in information coming from social media.

The concerns of the Swiss population about not being able to recognise false reports in online news have increased compared to the previous year. *Facebook* is viewed very critically with regard to the problem of disinformation. The greatest concern of the Swiss people related to disinformation is that governments, politicians or parties from Switzerland (23%) or abroad (21%) are spreading false information. There is much less concern that news media or ordinary citizens will disseminate disinformation.



**Figure 10: Decrease in “Old World” news repertoires and increase in “New World” news repertoires**

The diagram shows the share developments of the six news repertoire types within the period from 2009 to 2020 (n = 41,118). From 2016 to 2017, the set of underlying media categories was expanded.

*Reading example:* The share of the News deprived respondents increased from 21% in 2009 to 37% in 2020.

### 3.4 Financing: The willingness to pay slightly improves among the young adults

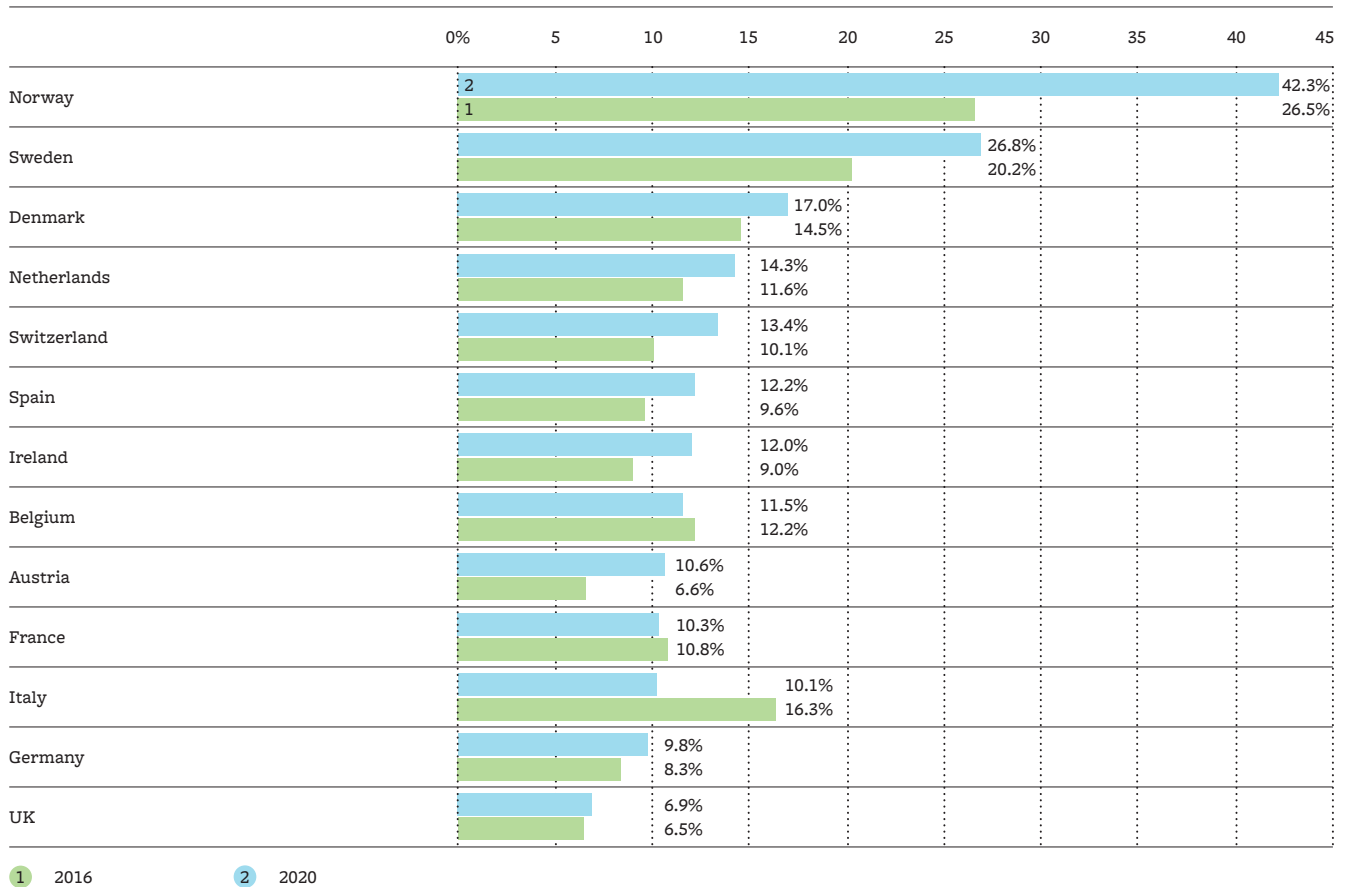
The coronavirus crisis has further accentuated the economic crisis of journalism (fög, 2020). The advertising revenues of the Swiss news media continue to decline. In 2019, the printed newspapers lost a further 8% of their advertising revenues, falling below CHF1 billion for the first time. The television advertising revenues are also declining (–8%). By contrast, the online advertising market has slightly grown (+4%). Most of the revenues from online advertising, however, go to tech companies. An expert survey by *Publicom* concluded that the tech platforms (e.g. *Google*, *Facebook*) generate approximately 1.6 billion Swiss francs in online advertising revenue in Switzerland.

Against the backdrop of the strong revenue losses in the advertising market, new payment models for online news are becoming increasingly important. However, only 13% of the Swiss population are willing to pay for online news (see Figure 11). Older people, who generally use traditional news sources rather than digital ones, and women, are less likely to pay for online news. However, the willingness to pay

has increased most among young women from 18 to 24, and currently stands at 19%. Our qualitative study on the media usage of young adults showed that young people pay for news under certain conditions, such as for bundled offers from different news sources on a single platform and with a flat rate (see Chapter 2.1).

### 3.5 Media content concentration continues

The economic crisis of journalism enhances media concentration in Switzerland (fög, 2020). The concentration of ownership is high. In 2019, the three largest media companies owned 82% of the newspaper market in the German-speaking region of Switzerland. The French- and Italian-speaking regions' shares of the newspaper market are equally high (89% and 68%, respectively). In the market for online news media, the concentration is considerably higher in the smaller language regions: in the French-speaking region, the three largest companies own 84% of the online news market; in the Italian-speaking region, 86%; and in German-speaking region, 69% (see Figure 12).



**Figure 11: Development of willingness to pay for online news in the international comparison**

The chart shows the share of respondents from Switzerland and the reference countries who stated that they had paid for online news in the last year (source: Reuters Institute, 2020; Reuters Institute, 2016).

*Reading example:* In 2020, 13% of the respondents from Switzerland stated that they had paid for online news in the previous year. In 2016, this figure was 10%.

In addition to the concentration of ownership, the large-scale introduction of editorial cooperation promotes media concentration on the content level. Media content concentration is measured by analysing the extent to which the same media articles are published in different media titles. For this Yearbook, the media content concentration in the press market of the German-speaking region of Switzerland from 2017 to 2019 was examined. The analysis thus covered the period in which the companies *TX Group* and *CH Media*, two of the largest Swiss media

companies, introduced or expanded their centralised editorial offices and newsrooms. The shared news items were determined via automated text comparisons.

The study confirmed that the media content concentration increased. From 2017 to 2019, the shared news items in the market increased from 10% to 21%. Within *TX Group's* network system, the shared news items increased by 21 percentage points to 37%. This is a consequence of the integration of the *Basler Zeitung* and the *Berner Zeitung* into the



system. In *CH Media's* network system, the merging of the editorial offices in 2019 led to an increase in content concentration from 12% to 20%. A particularly high degree of content concentration was seen in the sensitive area of national political reporting. It has increased by 20 percentage points to a high 41% in 2019. The number of shared editorials, comments and reviews also increased by 8 percentage points. Thus, the same voting recommendations are often being published in different outlets. This is a problematic development for the Swiss political system, which relies on diverse venues for public discourse, especially because of frequent referendums and initiatives. In addition, from a reputational perspective, media content concentration is undesirable for organisations as the few editors decide who gets publicity and how an organisation is evaluated in the media.

The media content concentration would be less of a problem if the total number of published articles increased or at least remained stable. The opposite is true, however. Newspapers are becoming increasingly thinner. This is illustrated by the number of articles published per month in the newspapers *Blick*, *SonntagsZeitung*, *NZZ* and *Tages-Anzeiger*. The average number of articles published per month in 2019 is almost exactly just half of the figure for the years 2000–2008.

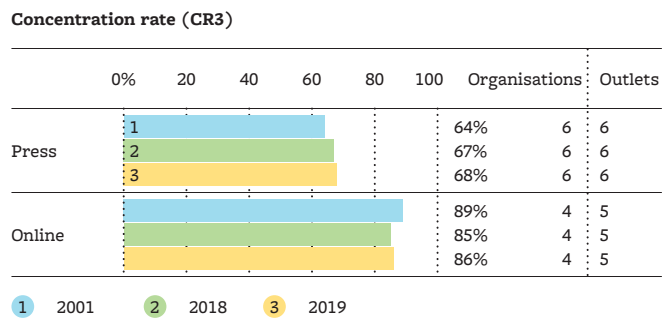
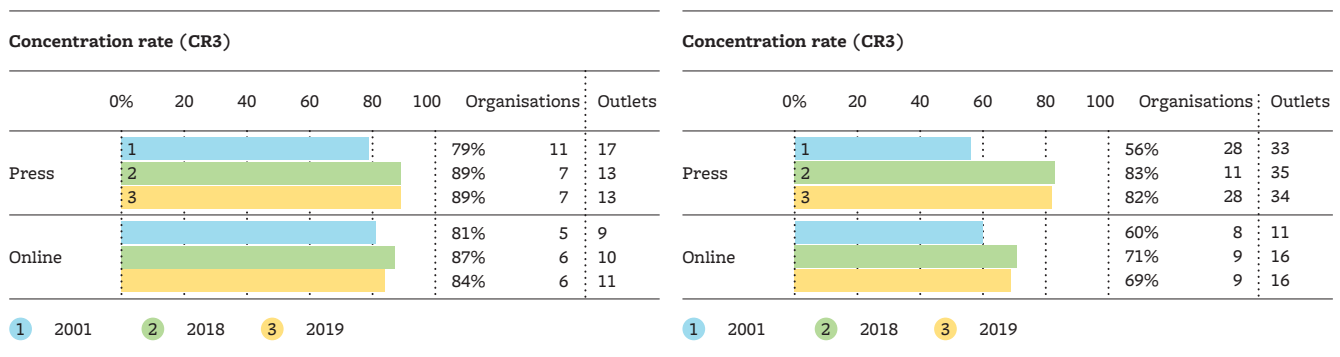
#### 4 Conclusion and Recommendations for Action

Our study on the quality of coronavirus media coverage showed a very high dependence on external experts. In far too few cases do the media contextualise the statements given by experts. A supplementary study also confirmed the status of science journalism as a niche department in editorial offices. This is a problem at a time when the demand for scientifically sound knowledge is higher than ever before, and because science journalism also has an indispensable task of uncovering disinformation on the internet. It is therefore necessary to revalue the specialisation in journalism, especially in the age of integrated newsrooms. For this purpose, the resource problem in information journalism must be solved. In view of the growing market failure, an increase in

the direct subsidies of the media is indispensable across the different media sectors.

Recently, our research has again focused on the problem of “news deprivation”. Indeed, the percentage of people who are undersupplied with news remains high. Our in-depth qualitative analysis of the media usage behaviour of young adults now shows, however, that the group of the “news deprived” is by no means lost to journalism. News can be interesting for these users provided that they can identify with the person who is sharing and disseminating an article. This means that journalism has to build up targeted journalistic influencers who give a face to the rich information disseminated on social media platforms. Headlines and images are also important. If journalism wants to reach the users, “intelligent clickbaiting” is necessary. Journalism is required to convey the essence of an article in a gripping way in the headline and the first lines of the article, and to make sure that the content is easy to reproduce and disseminate. As such, news articles should definitely be supported by audiovisual elements (e.g. infographics). This increases the chances that news pieces will then be used in their entirety (i.e. read, listened to, or watched). In general, our study showed that journalistic content is used and possibly shared if it fits one’s own identity and social network. For journalism, this means that the conventional target group categorisation, often simplified and broken down according to socio-demographic variables, is no longer sufficient. What is needed is a more differentiated, dynamic breakdown of the target groups as communities or “personas” with specific values, personality traits and changing individual preferences.

Even in the digital age, young adults’ interest in news is still very much shaped in the offline world. Their personal conversations about current events with their friends or acquaintances, or with their parents at home or at the dinner table, are a central factor in determining whether and to what extent young adults will show interest in news. Their interest in news increases especially when they feel that they may miss out on something in their own community or when they think they may be left out of the conversation. It is therefore essential, not least at schools, to devote more time to the discussion of current events based on media contents.



**Figure 12: Concentration in the press and online market**

The chart shows the market shares of the three largest organisations that ultimately control a news outlet (concentration rate: CR3) per language region, and how the shares have changed over time. In addition, the number of controlling media organisations and outlets is noted (source: WEMF, NET-Metrix). All the press and online outlets that reach more than 0.5% of a language region's population were included.

*Reading example:* In the Suisse romande, the three largest media organisations (*TX Group*, *Editions Suisses Holding* and *mediafsa*) control 89% of the total press market in 2019 (68%, 12% and 8%, respectively). In the reference year 2001, the top 3 share was much lower, and the top 3 controllers consisted of other media organisations.

The unbundled media consumption, the so-called emergent-media consumption, is progressing. What is defined as a “medium”, brand or “news outlet” is increasingly being decided by the demand side (i.e. the users) and no longer by the supply side (i.e. by the news outlets themselves). People’s media experiences are increasingly based on which of the various news sources are dynamically mixed together on their mobile devices, in their content feeds. Against this backdrop, if young users are at all prepared to pay for journalistic content, they would pay only for integrated platform services that offer content from a wide variety of sources at a cost-effective flat rate. News media should therefore consider offering the young target group a “*Spotify* for Journal-

ism” with a graduated pricing model. A very low, symbolic price for younger target groups can be an option, with successively higher rates for older ones. It is also conceivable to offer the target groups access similar to that offered by *Netflix*, which can be used by several people.

All in all, therefore, there is an untapped potential for winning over young adults again to journalism. News media should be responsive to the wishes and preferences of this user group, but without compromising their quality and standards. It is probably even more important to communicate the essential importance of journalism for democracy and society. Educational institutions have a special responsibility in this regard.

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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 methodical 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 story being coded by trained coders according to the scientific conventions (no automated content analysis). The random sample from 2019 included 21,324 news items from 58 Swiss news outlets (fög, 2020).

### Surveys

Two audience surveys were used. First, as in the previous years, we used data from the *Reuters Institute Digital News Report*. This global report contains representative survey data concerning the online user behaviour of the populations of 40 countries (over 80,000 interviews), including Switzerland. The fög Research Center for the Public Sphere and Society, University of Zurich is the Swiss country partner for this major study conducted by the Reuters Institute for the Study of Journalism at the University of Oxford. In Switzerland, some 2,000 internet users were surveyed from the German- and French-speaking regions of Switzerland. Random samples representative of the internet users aged 18 and over were taken on the basis of online panels (fög, 2020).

Second, survey data from the representative yearly media usage survey conducted by fög in collaboration with GfK Switzerland were included. In this survey, 3,400 online interviews have been conducted since 2009, at the beginning of each year (fög, 2020).

### Media industry data

The data on news outlets' reach and media concentration in media markets were based on the circulation figures or audience reach as measured by the media research organisations WEMF and NET-Metrix. The data on the media funding came from the Stiftung Werbestatistik Schweiz.

## 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 Quality Concept

The Yearbook is based on a normative understanding of quality, which assumes that the news media in a functioning democracy play an important role in the society. Four quality dimensions can be derived from the performance functions of public communication, which are anchored both in scientific research and in journalistic practice. First of all, 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 con-

tent-related and geographical perspectives. The *contextualisation* dimension 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 which the news sources and authorship are made transparent.

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### 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](http://www.foeg.uzh.ch)). Six scientific and three student staff members are involved in the research and guarantee the high quality of the analyses.

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### Who Finances and Supports the Yearbook?

The Yearbook is financed by the non-profit Kurt Imhof Foundation for Media Quality ([www.kurtimhof-stiftung.ch](http://www.kurtimhof-stiftung.ch)) and the University of Zurich. The foundation board is composed of Christine Egerszegi-Obrist, Mark Eisenegger, Barbara Käch, Yves Kugelmann, Oswald Sigg, Ulrich E. Gut, Nenad Stojanović and Maude Rivière.

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### Where Can We Find the Yearbook and Related Studies?

The Yearbook is available in print (ISBN 978-3-7965-4291-6) from Schwabe Verlag ([www.schwabe.ch](http://www.schwabe.ch)) and is published every fall. In addition, a freely accessible PDF of the *Yearbook Qualität der Medien* is available at [www.foeg.uzh.ch](http://www.foeg.uzh.ch). The “Studien Qualität der Medien”, which are part of the Yearbook, are also published separately as PDFs and focus on specific media-quality-related topics.