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Yearbook 2012

The Quality of the Media

Main findings

Switzerland

fög / University of Zurich

Schwabe

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The *Jahrbuch Qualität der Medien* (Yearbook "The Quality of the Media") is a publication in German of Schwabe Publishers Basel. To order this Yearbook please use the attached form or go to any bookshop. Excerpts from the Yearbook are available on the Internet: www.qualitaet-der-medien.ch.

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Translation:
Syntax Translations Ltd., Zurich
www.syntax.ch
Design: Thomas Lutz, Schwabe
Production: Schwabe AG, Printing House, Muttenz/Basel, Switzerland
ISBN 978-3-7965-2905-4

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Yearbook 2012: The Quality of the Media – Switzerland

What is the purpose of the Yearbook?

The aim of the Yearbook is to improve awareness of quality of the media. It will be a resource for people working in the media, those involved in politics, business or academia and anyone with an interest in media trends and what the media are saying. The Yearbook is based on the understanding that the quality of democracy depends on the quality of the information communicated to the public by the media. The Yearbook will provide the public with a benchmark for deciding the kind of journalism they wish to be exposed to, and the media makers with a benchmark for the kind of journalism they want to produce and assume responsibility for. Politicians will gain a feel for how the media world is developing and the resources available for information-based journalism in Switzerland.

Who is responsible for the Yearbook?

The Yearbook is produced and published by the fög – the Center for Research on the Public Sphere and Society at the University of Zurich (www.foeg.uzh.ch). The following authors have contributed to the Yearbook 2012: Urs Christen, Mark Eisenegger, Patrik Ettinger, Angelo Gisler, Lucie Hauser, Florent Heyworth, Kurt Imhof, Esther Kamber, Jens Lucht, Johannes Raabe, Michael Schanne (guest writer), Mario Schranz, Annina Stoffel (guest writer), Peter Studer (guest writer), Linards Udris, Vinzenz Wyss (guest writer).

Who provides funding and support for the Yearbook?

The Yearbook is financed by the non-profit Stiftung Öffentlichkeit und Gesellschaft (Foundation for the Public Sphere and Society – www.oeffentlichkeit.ch). The Board of Trustees is made up of Christine Egerszegi-Obrist, Kurt Imhof, Yves Kugelmann and Oswald Sigg.
The foundation owes the funding for the project to the following donors: Adolf und Mary Mil Stiftung, Allianz Suisse, Allreal Holding AG, Anne Frank Fonds Basel, Bank Julius Bär, Credit Suisse Foundation, Hotel Bellevue Palace Berne; Paul Schiller Stiftung, Prof. Otto Beisheim Stiftung, Partner Reinsurance Europe Limited (PartnerRe), Schweizerische Mobiliar Versicherungsgesellschaft AG, Schweizerische Post, Stiftung für Gesellschaft, Kultur und Presse – Schweiz, Stiftung Qualitätsjournalismus Ostschweiz, Swiss Re, Vontobel-Stiftung, Zürcher Kantonalbank and various individual donors.
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Where is the Yearbook published?

The Yearbook is published by Schwabe Publishers in hardcopy form (ISBN 978-3-7965-2776-0) and as an online version (ISBN 978-3-7965-2856-9). The results can also be accessed on the Internet (www.qualitaet-der-medien.ch). The fög regularly publishes further research on this platform.

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1. Quality of the Media Yearbook 2012 – a summary of the key points

If, to get a feel for some of the main insights in this Yearbook, one were first to consider the short period covered by investigation years 2010 and 2011 for purposes of comparison, it would be quite clear that the information media were more concerned with relevant hard news during 2011 than in the previous year. The deepening crisis affecting the global economy, the upheaval in the Arab world and the elections in Switzerland were all features of a news year which posed a major challenge to journalism. Any gains in relevance, however, must be seen against the tendency to provide less context (1.1 Greater relevance and less context).

Taking a somewhat longer-term view, there is evidence since the start of the new millennium that the Swiss media scene is becoming more fragmented and stratified in a downwards direction: a polarity is emerging between higher-quality media for elite groups and low-quality media for the mass of the population, as well as a similar gulf between older and younger age groups. During this short time span, the free media have turned tabloid-style journalism from a rather circumscribed and limited phenomenon into the journalistic mainstream. And this mainstream is neither left- nor right-leaning; it mainly consists of episodic journalism and soft news and favours coverage of those actors who fit this profile (1.2 Downwards stratification and fragmentation).

Not only, but mainly since the crisis affecting the traditional business model for information-based journalism erupted as a result of a slump in advertising revenue and proceeds from sales, the Swiss media scene has witnessed an intensive process of concentration, with austerity measures and the development of new business models the order of the day. These business models favour economies of scale and look to reduce diversity by either encouraging growth and/or transforming journalism through the use of non-media-related value creation chains, whereby media are used as sales and marketing channels in their own right. The tradition of a self-imposed commitment to good journalistic practice within the media is being eroded (1.3 Concentration and new business models).

This journalistic tradition of a self-imposed commitment to a kind of journalism which maintains professional and ethical standards has never really gained currency within private broadcasting. In terms of the radio and TV offerings covered, no significant differences emerged with regard to the quality of the information-based journalism – between providers which hold a concession, receive fees and are expected to provide some public service output and those which are simply registered and are subject to no public service requirements. Similarly, providers with higher advertising revenue do not provide better quality information-based journalism than those with far lower advertising revenue and corresponding resources (1.4 Lack of self-imposed journalistic commitment within private broadcasting).

There is an erosion or lack of self-imposed commitment to journalistic quality and this, along with business models which prefer economies of scale to quality and diversity and sacrifice journalistic independence in favour of integrating media-related and non-media-related value creation chains, is combining to change news agendas, something which is also illustrated in the in-depth studies in this Yearbook: the study entitled "Swiss media during the election campaign. Quality of media reporting before the federal elections of 2011" shows, among other things, that the Federal Council elections, which had long attracted less attention than the national parliament elections, were starting to make up ground on the federal elections in terms of media coverage thanks to the intense level of personalisation involved. The in-depth study entitled "Online news – a direct comparison between the quality of press and online outlets" refers to the significant gap in quality between print and online media: with the exception of free newspapers, the kind of quality promised by the print brands does not materialise online. In addition, the in-depth study entitled "Crime reporting in the Swiss press" shows that political campaigns tend

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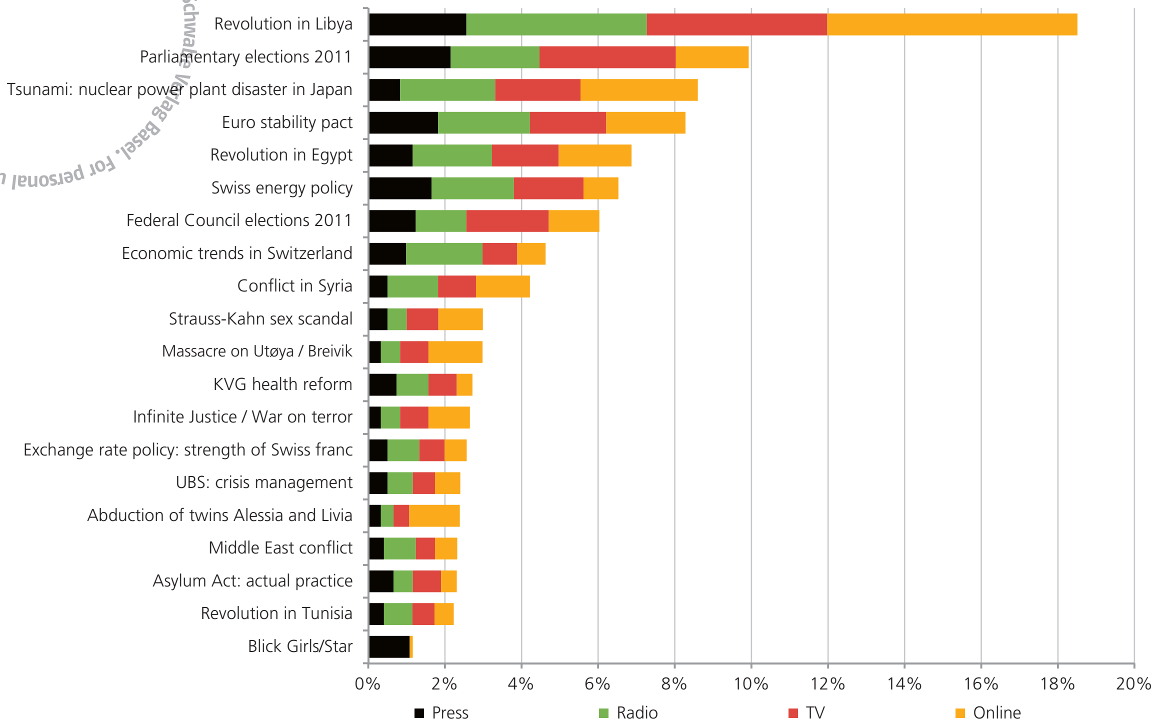

Diagram 1: Media agenda in Switzerland

The diagram shows the 20 biggest communication events (CE) in the Swiss media arena. The bars show the average share of reporting on each CE for the individual media forms. Data set used: All news stories on the top 20 CEs from the analysis of front page and lead stories for the period from 1 January to 31 December 2011 (n = 12,826).

Interpretation example: The revolution in Libya as a communication event received the most attention (position 1) in the Swiss media arena during the period under investigation. 18.5% of reporting was devoted to this CE. The news stories within the press form accounted for 13.8% of the reporting for this communication event.

to intensify crime reporting across the media, with violent and sexual offences being significantly overrepresented in terms of the actual crime statistics. The guest report entitled "Media criticism in Switzerland – an appraisal" indicates that, although criticism of the media may have increased due to certain actors within society, the scant attention paid to this in the media means that this has received little exposure. There is little journalism dedicated to media criticism and outside criticism finds little resonance (1.5 In-depth studies: elections; online; crime; media criticism in Switzerland).

Seen in the light of the traditional quality standards which apply to information-based journalism, this situation raises the question of what needs to be done, since the reduction in the quality of information-based journalism within the small media markets in Switzerland will only get worse if there are no publicly supported media policy measures in place to prevent this happening (1.6 What needs to be done?).

Following these considerations, the second part will provide a detailed outline of the main findings from the various sections of this Yearbook and for each media form, and will present the most important results of the in-depth studies (2. Quality of the Media Yearbook 2012 – results of the analyses of the Swiss media arena, of the press, radio, TV and online media forms and of the in-depth studies).

1.1 Greater relevance and less context

During the year under investigation, the world has become a more unpredictable and threatening place as a result of the turmoil in the Arab world and the debt crisis affecting banks, households and governments, as well as the European monetary union; not to mention the difficulties besetting Switzerland as a financial

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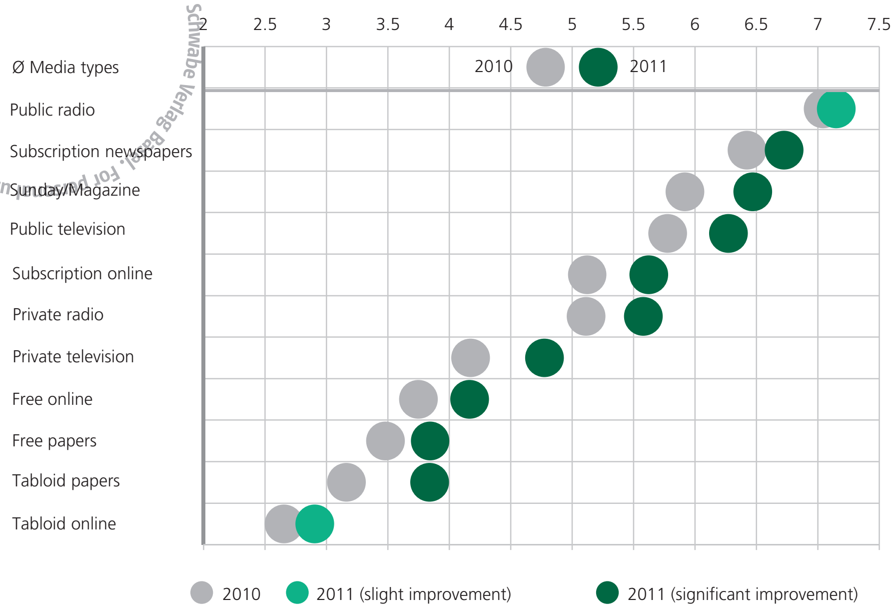

Diagram 2: Increasing relevance of media news stories between 2010 and 2011

The diagram shows for each media type the changes in terms of the relevance quality criterion (greater focus on hard news and events relevant to society as a whole). Data set used: All news stories from the analysis of front page and lead stories based on random samples from 2010 and 2011 (2010 n = 15,656; 2011 n = 17,091).
Interpretation example: The lead stories from public television achieved above-average relevance scores when the various media types are compared. These scores have even improved on the previous year's.

centre and the pressure being applied to the euro area and Swiss taxation law (see diagram 1; Quality validation: front page and lead stories). As our colleagues working on the *Project for Excellence in Journalism* for the USA have also highlighted, the year of crises and upheaval that was 2011 generated a tremendous amount of pressure on news output ((http://stateofthemedia.org/2012/mobile-devices-and-news-consumption-some-good-signs-for-journalism/year-in-2011/).
In addition, the news scene within the field of information-based journalism was also big on domestic politics thanks to the major events of the federal elections and the Federal Council elections, the debates surrounding energy policy following the catastrophe in Japan and the strength of the Swiss franc.
In terms of the agenda for the most important issues addressed by information-based journalism in Switzerland, this represents a significant increase in relevant hard news and a reduction in soft news compared with 2010. Even though these soft news (human interest and sport) continue to dominate the news sites of the tabloid and free newspapers, as well as the tabloid and free newspapers themselves, at between 52% and 70%, the news scene saw a shift towards more relevant content even in these media. The increase in relevance can be seen not only in the issue agendas but also by analysing the content of news stories (see diagram 2; Quality validation: front page and lead stories).
This is the good news from the investigations conducted for the Yearbook 2012. Conversely, this busy world is suffering from a significant reduction in the amount of context provided by information-based journalism (see diagram 3; Quality validation: front page and lead stories). Episodic journalism, with its focus on the very latest developments, has increased markedly. In terms of the free media, both online and offline, where this kind of events-driven journalism is already dominant, this basically means the existing situation has become even worse; by contrast, the subscription newspapers' coverage of the crises and upheaval during 2011 saw a marked decrease in the level of context provided. This pressure on news output illustrates the limits of the journalistic resources within the subscription press, which per se traditionally provides the most detailed coverage and context for the course of events in the form of explanations of cause and effect, investigations and opinion pieces.

1.2 Downwards stratification and fragmentation

Thanks to the first use of quality scoring in this Yearbook, which factors in the various quality indicators

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Diagram 3: Partial reduction in rationality and context associated with media news stories between 2010 and 2011
The diagram shows for each media type the changes in terms of the rationality and context quality criteria (greater or lesser focus on emotional aspects and a lesser or greater amount of context). Data set used: All news stories from the analysis of front page and lead stories based on random samples from 2010 and 2011 (2010 n = 15,656; 2011 n = 17,091).
Interpretation example: The front page stories from the news sites of the free papers achieved below-average scores for rationality and context in comparative terms. These scores were even down further on the previous year's.

recorded, it is possible to establish a hierarchy based on relevance, diversity, rationality and context provided by information-based journalism in terms of the media forms (press, radio, TV, online), the media types (e.g. subscription or Sunday papers) and the individual media outlets. This quality scoring reveals a Swiss media scene that is rather fragmented and stratified in a downwards direction.

Whereas the information-based journalism in the field of public radio delivered the best quality during 2011 *(Echo der Zeit, Rendez-vous)*, the worst performers in terms of quality were the online and offline versions of the widely available free and tabloid papers and the online versions of the subscription press from French-speaking Switzerland and private broadcasters (*Nachrichten* from *Radio Argovia, 20minuten.ch, 20 Minuten, Tribune de Genève Online, 24heures.ch, 20minutes.ch, 20 minutes, Lematin.ch, Aktuell* from *Tele M1, Züri News* from *Tele Züri, Blick, Sonntagsblick, Le Matin* and *Blick.ch*). Between these two extremes lay the subscription and Sunday papers, other public radio broadcasters, public television and the two best news sites (*NZZ Online* and *tagesanzeiger.ch*). In 2011, the lower end of this intermediate range included the *Berner Zeitung* and *24 heures*, not too far above the free papers, whereas the top end included the inter-regional subscription papers *Neue Zürcher Zeitung* and *Le Temps*, the *NZZ am Sonntag* and the *Neue Luzerner Zeitung*, not too far below the information-based output of public radio. In terms of the coverage by these media outlets of the population living in the respective linguistic regions since the start of the new millennium, a picture emerges, particularly in French-speaking Switzerland, of a quality pyramid with an eroding tip and crumbling middle section supported by an excessively broad base. The tip and middle section of the pyramid – apart from two news sites provided by public or pay media – have lost audience share, particularly during the last three years. Only the base of the pyramid, and most of all the online and offline free media, is gaining audience share (see diagram 4; Quality validation: front page and lead stories).

Coverage of the population in the various linguistic regions

The coverage by the respective media outlet of the population within its particular linguistic region – German-speaking Switzerland, French-speaking Switzerland and Italian-speaking Switzerland – is one of the key performance indicators in this Yearbook. It represents the share in percentage terms of the circulation (press) or audience (radio, TV, online) enjoyed by a

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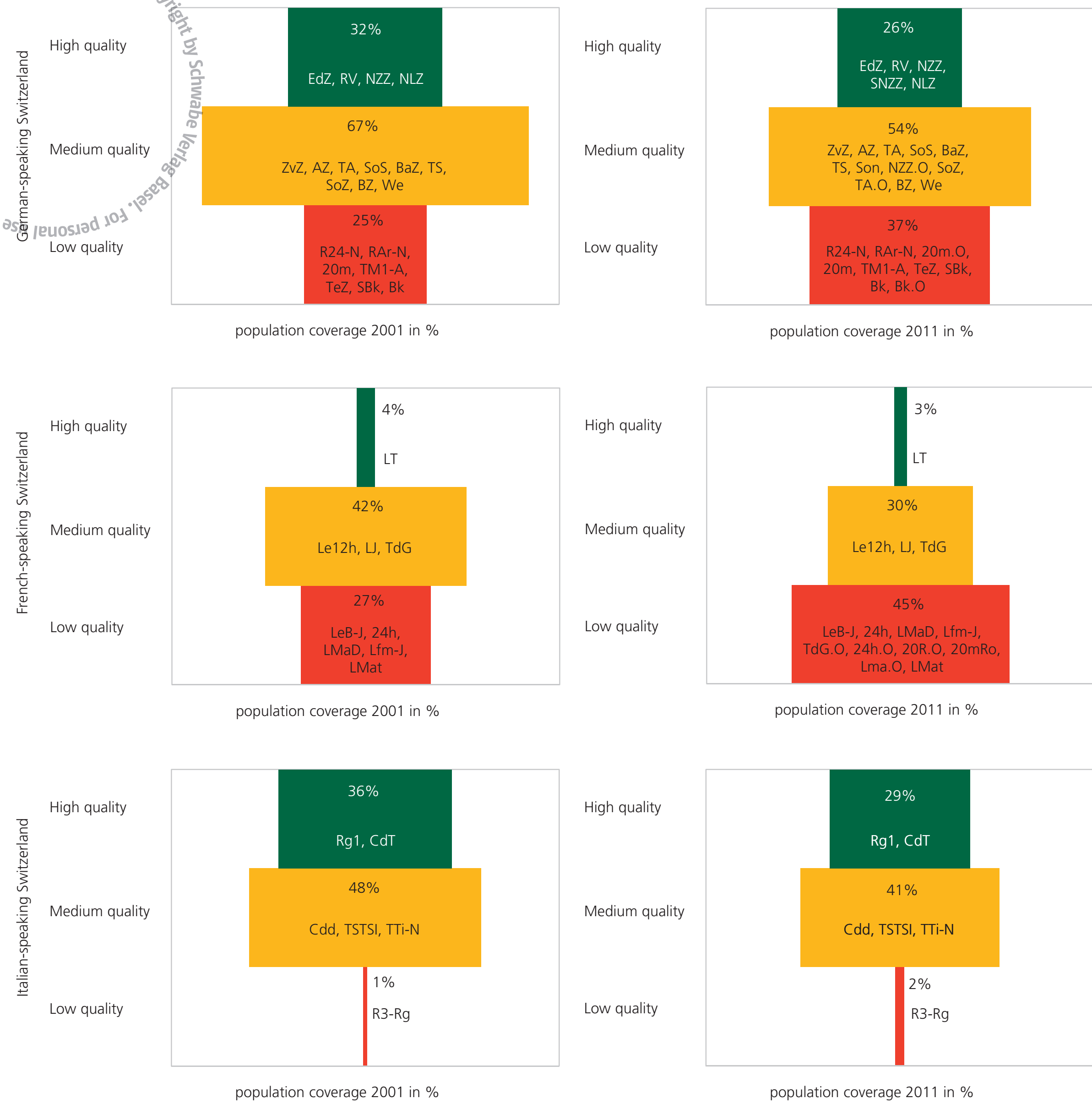

Diagram 4: Quality pyramids

Each of the diagrams shows how the coverage of the population in the linguistic regions by the relevant low-, medium- and high-quality media outlets has changed, between 2001 and 2011, broken down by individual linguistic regions. Data set used for quality classification: All front page and lead stories based on the random sample for 2011 (n = 17,091); data sources for circulation and usage figures: WEMF, NET-Metrix, Mediapulse.

Interpretation example: In French-speaking Switzerland low-quality media outlets were reaching 27% of the population in 2001. Ten years later media outlets of a similarly low quality were already covering some 45% of the population.

Abbreviations used for media outlets

German-speaking Switzerland: 20m: 20 Minuten; 20m.O: 20minuten.ch; AZ: Aargauer Zeitung; BaZ: Basler Zeitung; BZ: Berner Zeitung; Bk: Blick; Bk.O: Blick.ch; EdZ: Echo der Zeit (DRS1); SoS: Die Südostschweiz; NLZ: Neue Luzerner Zeitung; NZZ: Neue Zürcher Zeitung; NZZ.O: NZZ Online; SNZZ: NZZ am Sonntag; R24-N: News (Radio 24); RAr-N: Nachrichten (Radio Argovia); RV: Rendez-vous (DRS1); SBk: SonntagsBlick; Son: Der Sonntag; SoZ: Sonntags-Zeitung; TA.O: tagesanzeiger.ch; TA: Tages-Anzeiger; TeZ: Züri News (Tele Züri); TM1-A: Aktuell (Tele M1); We: Weltwoche; ZvZ: 10vor10 (SF1)

French-speaking Switzerland: 20mRo: 20 minutes; 20R.O: 20minutes.ch; 24h: 24 heures; 24h.O: 24heures.ch; Le12h: 12h30 (La 1ère); LeB-J: Journal (Léman Bleu); LJ: Le Journal (RTS Un); Lfm-J: Journal (Lausanne FM); LMaD: Le Matin Dimanche; LMa.O: Lematin.ch; LMat: Le Matin; LT: Le Temps; TdG: Tribune de Genève; TdG.O: Tribune de Genève Online

Italian-speaking Switzerland: Cdd: Il Caffè; CdT: Corriere del Ticino; R3-Rg: Radiogiornale (Radio 3iii); Rg1: Radiogiornale 12.30 (Rete Uno); TSTSI: Telegiornale sera (LA 1); TTi-N: Ticino News (TeleTicino)

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media outlet among the population over the age of 15 living in the respective linguistic regions. It serves as a selection criterion for recording the significant media outlets for each linguistic region. Media outlets are only considered if they cover at least 0.5% of the population in the linguistic region. In addition, the population coverage of the significant media outlets is aggregated according to specific criteria. This means aggregating the percentage-based population coverage of media outlets with the same level of quality in order to calculate the coverage rate by high-, medium- or low-quality media outlets. The coverage rate can exceed 100%, since consumers may use more than just the one outlet.

In terms of the press alone, the free papers have helped tabloid-style journalism, formerly the distinct preserve of the tabloid press, become twice as prevalent as at the start of the millennium. "Tabloid" style has become the journalistic mainstream, while public broadcasters and subscription papers are losing audience share and the latter also suffer falls in sales and advertising. Taking into account the age of the audience, the situation can be summarised as follows: the Swiss media scene is experiencing fragmentation and downwards stratification, with elite groups and older people on the one hand and the broad mass of the population and younger people on the other consuming different media. This applies to all forms, except for online. No online media offering has been able to establish itself among the leaders in quality terms.

The biggest fall in journalistic quality has occurred in French-speaking Switzerland. The latest developments mean the news sites, tabloid papers, *20 minutes* and private broadcasters now cover, with 45%, by far the largest population share of the three main linguistic regions. As such, the kind of low-quality media concerned with soft news topics and regional matters tend to predominate in French-speaking Switzerland. This in turn undermines the journalistic competition, in quality terms, within French-speaking Switzerland.

1.3 Concentration and new business models

Media concentration describes a scenario where a controlling influence (an owner or majority shareholder) assumes a disproportionately strong position within the market. This kind of concentration should be viewed in different ways, depending on whether the market concerned is subject to strong or weak regulation. Broadcasting, which is fairly strictly regulated, has obligations regarding specific public service output. The key question here is whether or not this output is being delivered. The question of concentration and its effects on the media offer does apply, however, to the weakly regulated press and online market and can be answered initially, for each party with financial control, with reference to the various wide-circulation media outlets which reach more than 0.5% of the resident population in the relevant linguistic regions. This entire market therefore is made up of the various wide-circulation media outlets. Based on the majority shareholders and the largest minority shareholders, *Tamedia AG* accounts for 26 media outlets of all forms, *Ringier AG* and *NZZ-Gruppe* each have 10 outlets, with *AZ Medien AG*, *Timedia Holding SA* and *Editions Suisses Holding SA* having seven, six and five respectively.

If the focus is expanded beyond the number of media outlets for each controlling party to include the coverage of the press (circulation) and online (use) outlets with the aggregate figure expressed as a percentage, the biggest player within the press market is clearly *Tamedia AG* (41%) (see diagram 5). This company is some way ahead of *Ringier AG* (22%), with *NZZ-Gruppe* (13%) and *AZ Medien AG* (6%) even further behind. Whereas *NZZ-Gruppe* and *AZ Medien AG* are not involved in the French-speaking or Italian-speaking parts of Switzerland, *Tamedia AG* dominates the printed media scene in French-speaking Switzerland, with no less than 68% of the market, and has also been expanding into Italian-speaking Switzerland since the autumn of 2011 with *20 minuti*. If we disregard, in terms of the online market, two online portals with news tickers owned by companies from outside the sector, namely *Swisscom* (*Bluewin.ch:* 21%) and *Microsoft Advertising Schweiz* (*msn.ch:* 22%), *Tamedia AG* is also by far the biggest actor in the online sector among the media firms, with a 21% market share – twice as much as the next largest, *Ringier AG*. As far as the competition between the Schweizer Verlegerverband (Association of Swiss Publishers) and *SRG SSR* is concerned, a comparison shows that the three main media publishing houses of *Tamedia AG, Ringier AG* and *NZZ-Gruppe* control a combined total of 36% of the online market, while *SRG SSR* has a 12% market share (discounting the *Teletext* pages in all three lin-

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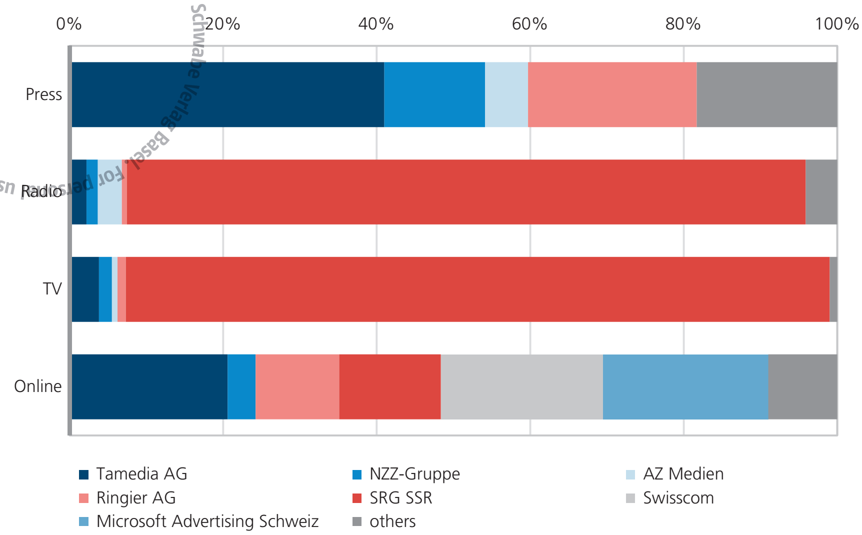

Diagram 5: Concentration within the Swiss media arena
The diagram shows the market shares for the main controlling parties within the press, radio, television and online media forms during 2011. The aggregate circulation and usage figures make up the entire market for a given form and the respective share held by the controlling parties determines their market position. All media outlets which cover at least 0.5% of the population in the linguistic regions are taken into account. (Source for circulation and usage figures: WEMF, Mediapulse, NET-Metrix.)
Interpretation example: Tamedia AG controlled 41% of the press market in 2011. This made it the largest of the few major players within the press scene, where competition is scarce.

guistic regions, which have little significance in journalistic terms).
The concentration process this reveals within the Swiss media has accelerated tremendously within recent times. Leading the way is *Tamedia AG*, whose share of the press market almost tripled from around 15% to 41% between 2005 and 2011. The concentration process is a product of shrinking revenues (advertising and sales), particularly in the subscription press (see diagram 7). As well as reflecting the economic downturn, the advertising situation also suffered first and foremost from business moving both to large companies from outside the sector (including *Bluewin*, *Google* and *Facebook*) and to the free papers within the sector, all of which exacerbated the loss of revenue experienced by the pay media: of the 46 press outlets investigated, the three free outlets *20 Minuten*, *20 minutes* and – although some distance behind – *Blick am Abend* pocketed 31% of gross advertising revenue during 2011 (see diagram 12). The 43 outlets from the subscription and tabloid press which people actually have to pay for had to be content to share the rest between them. Even if we assume that the gap between the gross and net amounts, i.e. the price discounts granted to advertising customers that cannot be determined in any detail, means this draining away of resources from the paid-for press is somewhat less than the gross figures indicate, the picture that emerges is one of a sector which, in its hunt for high-yield new business models as part of the digital revolution, is eating away at itself both financially and in terms of journalistic quality.
The classic business model here is to achieve benefits of scale and synergies with a view to creating large network systems for the purpose of advertising revenue, while reducing costs on the production side by recycling material, using cheap forms of journalism, and recording the highest possible circulation figures. *Tamedia AG* is leading the way with this kind of scaled-up model and has significantly reinforced the concentration process within Switzerland at the same time. Obviously, the more successful this model is, the more difficult it is for other media firms to achieve comparable economies of scale. The network synergies tend to reduce the diversity of public communication, with more of the same content being circulated via the various media channels. The likelihood of a pluralistic body of opinions and decision-making developing decreases accordingly. As such, the use of these network

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synergies would have to be accompanied by a stronger self-imposed commitment to journalistic quality on the part of media companies if the plurality of public communication is not to be jeopardised. In addition to economies of scale, *Ringier AG* ("Entertainment Company") is actually setting up an exploitation chain model, whereby media also act as sales channels and windows on lifestyles (like *Energy* radios) in order to support its own, non-sector-specific activities. Under this system, the media channels are used to publicise the sport and entertainment events, as well as the personnel involved, which companies within the same media firm are launching, managing and selling. This business model undermines the core value of editorial independence. Even *NZZ-Gruppe* is adopting this approach with sponsored finance-related events ("Neue Zürcher Zeitung – Capital Market Forum") for the high end of the market. Finally, the financial pressure facing information-based journalism is also bringing about a renaissance in media with an ideological character run by actors with financial clout with a political agenda. This model is not primarily concerned with making a financial return, but is more about influencing public opinion.

Models which intensify the concentration process, reduce the journalistic diversity and quality of information-based journalism, undermine editorial independence or are subservient to particular political interests are evidence of media companies that are less interested in furthering the cause of public communication or adhering to the self-imposed quality standards associated with journalism than making a financial return or wielding politic influence. Also, increasing differences are emerging between publishing houses and *SRG SSR* in online terms, an area where their offerings are starting to converge. What is more, there is a polarisation of political actors in the field of media policy too. Here, those on the right of the political spectrum tend to favour further deregulation of the media, even to the point of doing away with the public service aspect altogether, whereas those in the centre or on the left support a media policy based on regulation in view of the situation. As well as being grounded in a given ideology or world view – based on the age-old debate of whether markets or politicians should control things – both positions are also associated with particular interests: a commercialised media offering focusing solely on sales and circulation leads, apart from a few expensive products for elite groups, to media outlets for the masses which promote a kind of populism within the media. This gives political populism, with its tendency to reduce politics to a tense face-off between the people and the elite and the people and what is foreign to them, a much better chance of winning attention than the traditional popular parties with their more complex lines of argument. By contrast, information media, which uphold a tradition of self-imposed commitment to quality standards, promote political debate about problems concerning the social order by offering greater diversity and a kind of journalism which provides context.

1.4 Lack of self-imposed journalistic commitment within private broadcasting

If one were to take a look at the differences in information-based journalism offered by private broadcasting, no real relationship, neither in terms of radio nor television, emerges between the varying levels of advertising revenue and resources available and the quality of the information on offer. For example, 2011 saw *Radio Argovia* in the Canton of Aargau with its relatively large sales volume make a similarly small contribution to the quality of the media as the smaller *Radio 3iii* in Italian-speaking Switzerland. And *Lausanne FM* – despite having similar sales figures to *Radio 3iii* – provided much less context (see diagram 14). This phenomenon is even more marked on private TV: although *Léman Bleu* has the lowest resources of all seven broadcasters studied in terms of personnel, this private, concession-holding operator produces a news programme which is far superior across the full range of quality criteria to *Züri News* and *Aktuell* from broadcasters *Tele Züri* and *Tele M1*, with their greater resources, and even compares well with the news programmes on public television based on some criteria. Having said this, *Léman Bleu* cannot match the public offering in terms of providing context. Even the public service performance mandate, linked as it is to the award of a concession and supported by fees, clearly only has a small impact on quality. This can be seen with the news provided by the concession-holding broadcaster *Tele M1* and the broadcaster *Tele Züri*, which is just officially registered. Despite having a performance mandate and support from fees, the quality of the news on *Tele M1* is

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about as low as for *Tele Züri* according to most quality criteria. Human interest stories and episodic reporting predominate at both (see diagram 16; Quality validation: lead stories).

1.5 In-depth studies: elections; online; crime; media criticism in Switzerland

Finally, it is worth highlighting the findings from three in-depth studies: the study entitled "Swiss media during the election campaign. Quality of media reporting before the federal elections of 2011", for example, shows that the highly personalised Federal Council elections were getting more and more attention in the commercialised media compared with the federal elections (see diagram 22). At the same time, however, election reporting during 2011 focused less on just a few parties and people than was the case in 2007. The in-depth study entitled "Online news – a direct comparison between the quality of press and online outlets" clearly illustrates the huge differences in quality between these information media: the news sites do not contain nearly as much as the newspaper title promises. The only area where online beats print is where the content is free (see diagram 26). Lastly, the in-depth study entitled "Crime reporting in the Swiss press" makes it clear that the frequency and prominence of the coverage devoted to crime depends to a large extent on political campaigns and editorial directives, with crime reporting creating a situation in which serious violent and sexual offences are hugely over-represented in terms of the actual crime statistics (see diagram 28). The guest report by Vinzenz Wyss, Michael Schanne and Annina Stoffel entitled "Media criticism in Switzerland – an appraisal" describes the ever-growing number of actors within society voicing external criticism of the media in Switzerland and points out the dwindling amount of self-criticism within the media and – with the exception of public radio stations – the scant attention paid by the media themselves to media criticism from external sources.

1.6 What needs to be done?

Given the lack of journalistic resources, the fragmentation and downwards stratification within the media scene and the emergence of new business models with less self-imposed commitment towards journalistic quality, the question arises – over and above any impact that this kind of Yearbook may have on people targeted by the media and media makers – of how best to respond to these developments. This is important, because a democracy's ability to steer its own course depends in turn on the ability of information media in the form of press, radio, TV and online to convey material. Without this, no public debate can be generated from the communication flows, which, however peripheral these may be at the outset, must enter the arena provided by the information media so it becomes possible to find common denominators within societies between citizens who do not know one another. Only these information media can provide a continuous source of the kind of topics and opinions for debate that are needed if democratic societies are to understand themselves.

From a media policy perspective, Switzerland must ensure that its linguistic regions are provided with an adequate service in media markets which are small and offer correspondingly limited earning potential. It must also make allowance for the federal structure with its three levels of democratic decision-making and, in view of the way that information-based journalism is converging across the various forms, facilitate the investment required in the online area for the combination of image, sound and text, as well as take into account the intense competition from abroad as far as television is concerned. In light of the general lack of revenue for print-based and online media and within private broadcasting, the flight of advertising money both to actors from outside the sector (search engines, social media) and to advertising slots provided by foreign television broadcasters and the free papers, the reduced price awareness exhibited by the public, the lower self-imposed commitment towards journalistic quality on the part of the media companies and the high level of media concentration, media policy needs to find some new strategies. It is essential to promote information-based journalism, whatever the media form and incorporating certain compulsory elements, via a foundation at arm's length from the state. Also required are incentives for payment-based models across all media, improvements in terms of assessing, discussing and assuring quality and an attempt to integrate media skills within the education system.

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2. Quality of the Media Yearbook 2012 – results of the analyses of the Swiss media arena, of the press, radio, TV and online media forms and of the in-depth studies

2.1 Swiss media arena

Media structures

- *Significance of the press:* The very strong position enjoyed by the press in Switzerland compared with the rest of Europe developed within the country's federal structure and owes much to its parties and religions, as well as to a number of publishing families, some with a liberal attitude to society and morality and others of a more Catholic-conservative persuasion. As such, the press developed as an opinionated media form with a tendency to have an ideological bent. Following on from the structural changes affecting the public sphere, the erosion of the party-based scene and the dislodging of newspapers from the context associated with their origins, since the end of the 1960s there has been a growing shift from an "opinion market" where expectations of financial returns were secondary to an "information market" where expectations of generating revenue are at the front of people's minds. The start of this process at the end of the 1960s and during the early 1970s saw the emergence of forum-style newspapers with high quality standards in some cases, although these increasingly had to think in financial terms as the media world became increasingly commercialised. Since revenues within the press advertising market started to fall around the start of the new millennium, the resources available to information-based journalism have dwindled.
- *Public service within a dual system of broadcasting and incoming broadcasts from abroad:* In terms of broadcasting, the small state of Switzerland has hitherto pursued a policy of promoting public communication for the good of democracy. The idea is not only to ensure a basic coverage with electronic media, but also to provide a public service offering based on specific content. In television terms, however, Switzerland, ahead of Belgium and Austria, is facing the greatest problem from incoming broadcasts by television broadcasters from large neighbouring states. This allows public as well as private TV companies from abroad to benefit from a wider audience and correspondingly more extensive resources, which are not available in the small audience markets within Switzerland. As far as the private broadcasters from neighbouring countries are concerned, the profits from their Swiss advertising slots are extraordinarily high at 37% of the gross advertising revenue within the Swiss television advertising market, although there are no benefits in terms of journalism in Switzerland.
- *Loss of coverage by the press and broadcasters:* The press, radio and TV media forms are under pressure. All told, the main information outlets of the press, public radio and television are continuing to see their coverage rate fall in the linguistic regions, i.e. the circulation and usage figures for these information media are not growing in line with the population or are even decreasing. As far as the press is concerned, the coverage rate declined from 207% to 179% between 2009 and 2011. The aggregate circulation of all the press outlets recorded can no longer potentially cover the Swiss population twice over. So three short years have seen huge falls. The subscription press is suffering from the largest losses across all three linguistic regions (see diagram 6). The high coverage rates enjoyed by the free papers, which have only come into the equation since the start of the new millennium, are quite striking. Thanks to these, tabloid-style journalism has easily more than doubled within the press in German-speaking Switzerland, while it has not quite doubled in French-speaking Switzerland. The coverage of the population by information-based programmes on television decreased from 228% to 193% between 2009 and 2011. Even if the data available are insufficient to provide an accurate answer as to how far new methods of use like podcasts or live streaming are partly responsible for this decline in the coverage rate, it seems clear enough, however, that the new

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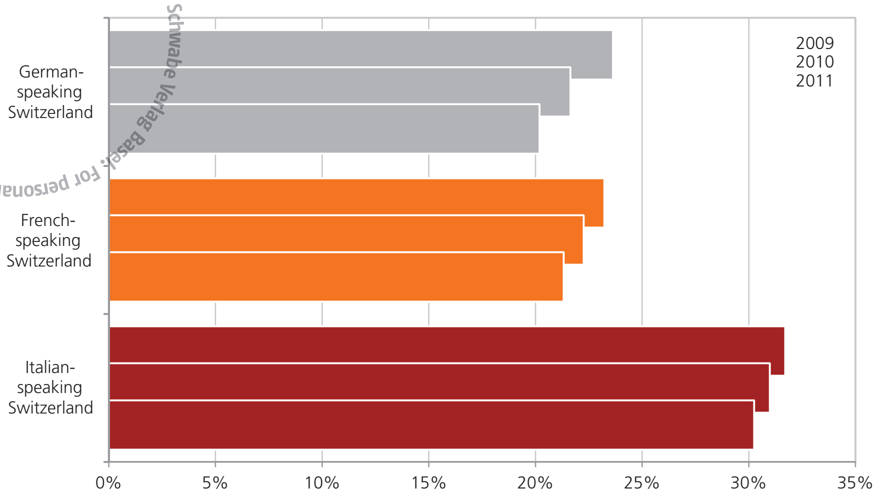

Diagram 6: Loss of coverage for subscription press
The diagram shows the coverage rate enjoyed by the subscription press for each linguistic region for 2009, 2010 and 2011. The bars illustrate the relationship between the aggregate circulation figures and the population in each of the linguistic regions for all subscription press outlets which reach at least 0.5% of the population in the given linguistic region (data source for circulation figures: WEMF). *Interpretation example:* The coverage rate for the subscription press has fallen between 2009 and 2011 across all three linguistic regions.

methods of use are only offsetting some of the losses. This is also true of radio. Audience figures are also falling for most information programmes on the radio. The aggregate audience for high-quality public radio only remained around as high during 2011 as it was in 2009 because it offered a few more programmes of relevance for recording purposes (primarily the relaunch of the news vehicle *Grigioni Sera* in Ticino). Private broadcasters play a subordinate role here. These are strongest in German-speaking Switzerland, where private radio and television each reach around 8% of the population. All in all, the coverage rate for the information outlets of private radio and television is 15%.

- *Increases in online coverage:* The online information element is some way behind the three media forms of TV, press and radio in terms of its coverage rate. Having said this, the population coverage for this element did increase by 17% between 2010 and 2011 and now stands at a rate of 132%. This means the Swiss population can potentially be covered more than once over by online outlets. As for the news sites (34%) of the media publishing houses which are of relevance in terms of information-based journalism, however, these are not as widespread as the online portals (98%). As far as the online portals are concerned, the combined news and service offerings reach the most people (*Bluewin.ch:* G 11%, F 9%, I 10%; *msn.ch:* G 10%, F 13%, I 5%), followed some distance behind by the public broadcasters' sites, with TV sites reaching the widest audience among these (*SF.tv* 5%, *tsr.ch* 5%, *rsi.ch* 4%). Compared with the news sites with the widest audience, however, the TV sites mostly lag behind the online tabloid-style and online free news sites (*Blick.ch* 8%, *20minuten.ch* 6%, *20minutes.ch* 7%). In German-speaking Switzerland, the privately owned media firms only reach around a third as many people with their digital news site offerings (21%) as they reach with their printed editions (61%). The figure for French-speaking Switzerland is more like a quarter (online 13%, print 51%).
- *Migration and loss of advertising revenue:* The loss of coverage experienced by the press also means a reduction in proceeds from sales. The advertising revenue recorded by the press is falling too. The press has lost a third of its commercial advertising revenue since 2000. To put this into numbers, the volume decreased from 3 billion Swiss francs in 2000 to around 2 billion in 2011. The last big drop occurred between 2008 and 2009, when advertising sales fell from 2.4 billion to 1.9 billion Swiss francs (see diagram 7). As well as highlighting structural change, this also shows just how much the press is affected by the state of the wider economy. By contrast – and in addition to the greater reliability of income from fees – the radio and television advertising market is also more stable than that of the press. In any event,

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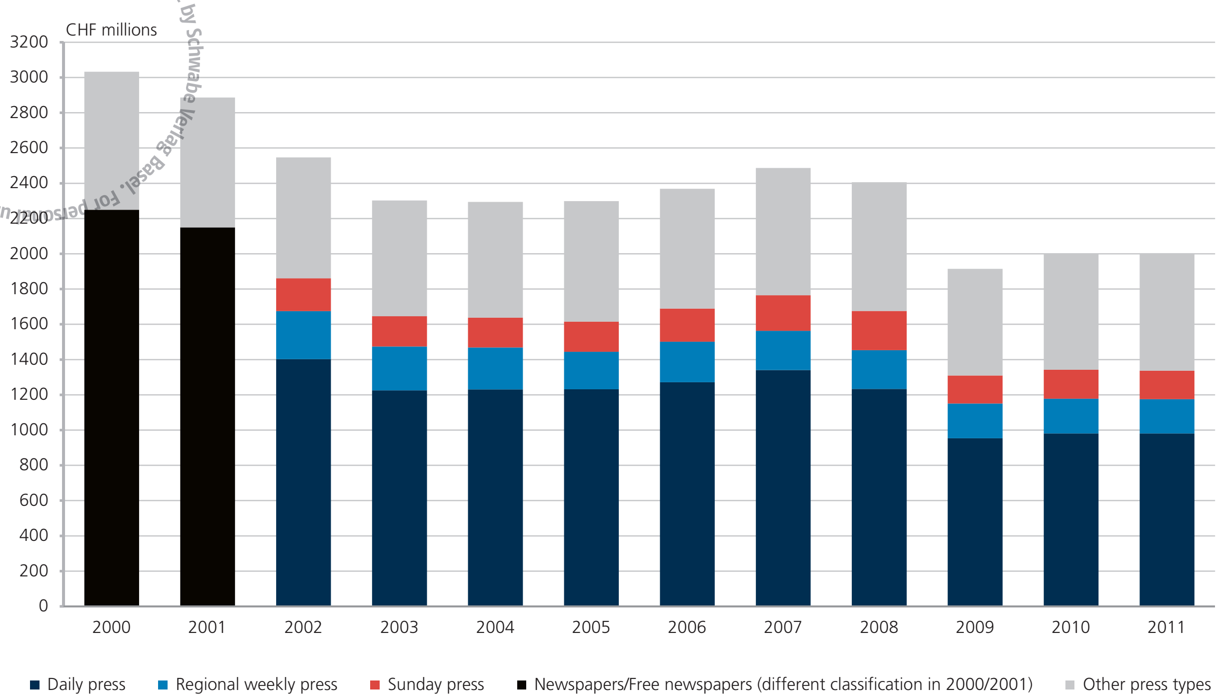

Diagram 7: Falling advertising revenue within the press
The diagram shows how net advertising sales for the Swiss press have changed between 2000 and 2011. The figures represent millions of Swiss francs. The years from 2002 onwards make a distinction between the information-based press types of primary interest for the purposes of this Yearbook, namely "daily press", "regional weekly press" and "Sunday press". The "other press types" category has incorporated the "public, special-interest and trade press" since 2000 and also the specifically designated "financial and business press" since 2002. Source of data: Advertising expenditure for Switzerland from the Stiftung Werbestatistik Schweiz (Swiss Foundation for Advertising Statistics).
Interpretation example: In 2011, net advertising sales for the Swiss press were CHF 2004 million, with the "daily press" enjoying the biggest share at 981 million ahead of the "regional weekly press" with 194 million and the "Sunday press" with 162 million. A comparison of overall net advertising sales for the Swiss press between 2000 and 2011 shows the volume has decreased by around a third.

foreign private operators cream off no less than 37% of gross advertising revenue from the television advertising market without having to provide any additional journalistic output. Were this advertising money to go to the private Swiss television operators, their (gross) budget from advertising revenue would practically quadruple at a stroke. The advertising volume within the online market as a whole increased between 2005 and 2011 from around 107 million Swiss francs to 521 million (gross). The news sites – the main online information media – only benefit, however, from display advertising, which merely accounts for around 30% of advertising revenue. The classified advertisement markets and search engines make up the remaining advertising volume. Here, there is a shift in terms of the online market as whole, with search engines gaining market share at the expense of the classified advertisement market. In 2005, the classified advertisement market accounted for some 50% of the total online advertising market, but this had fallen to around a third in 2011. Conversely, the search engines' share increased from 18% in 2005 to 30% of the volume in 2011.

- *A comparison across media forms of the funding situation for information-based journalism:* If one were to use the statistics available to get a feel for the funding situation of the various forms of information media, taking into account advertising revenue, proceeds from sales or income from fees, one would see that the press takes the lion's share at around three quarters of the resources for information-based journalism. Television-based information provision in the private and public sector enjoys

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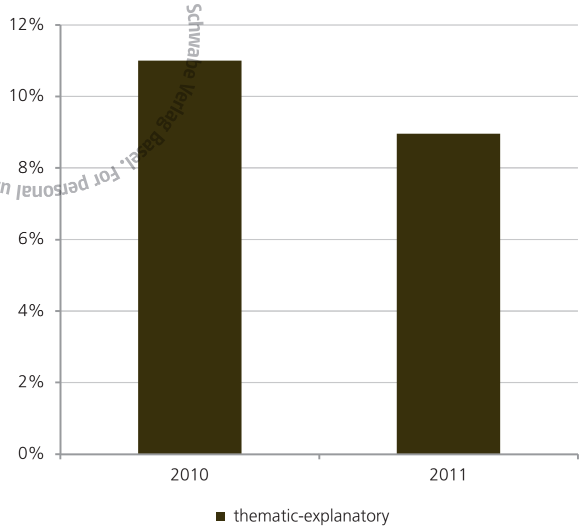

Diagram 8: Subscription newspapers – fall in the amount of context provided

The diagram shows how the percentage of thematic-explanatory reporting provided by the subscription papers has changed between 2010 and 2011. A news story is deemed to be thematic-explanatory if context is provided by explaining causal relationships. Data set used: All news stories from the front page analysis of the subscription press based on the random samples for 2010 and 2011 (2010: n = 4958; 2011: n = 5000).
Interpretation example: The percentage of thematic-explanatory reporting from the subscription papers fell by just under 2 percentage points between 2010 and 2011.

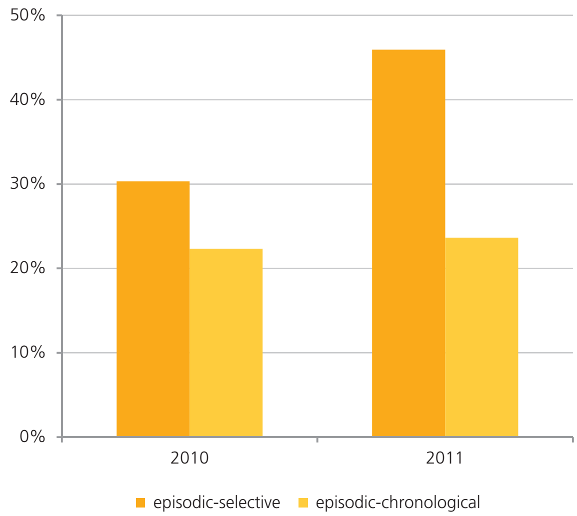

Diagram 9: News sites – increasing focus on reporting the very latest news

The diagram shows how the percentage of episodic reporting provided by the news sites has changed between 2010 and 2011. A news story is deemed to be episodic-selective if it is solely interested in the very latest events and episodic-chronological if it goes back over the sequence of recent events. Data set used: All online news stories from the front page analysis based on the random samples from 2010 and 2011 (2010: n = 2860; 2011: n = 2822).
Interpretation example: The percentage of episodic-selective reporting has increased within the online sector by around 15 percentage points during 2011.

around 14% of the entire funding pool available to information-based journalism. Compared with television, just half of this (7%) goes to radio. Lastly, and despite the growing online market, the advertising revenue within the online form only contributes around 3% to the funding of information-based journalism. Generally speaking, the information-based press in the subscription papers, traditionally an important and strong segment, is having to contend with a severe slump in revenue. This is a problem, because the subscription papers continue to provide the broadest financial base and, all in all, the greatest pool of talent for information-based journalism.

Quality validation

- *Less context provided, particularly in subscription papers:* As far as providing context is concerned, there has been a marked drop in quality compared with the previous year, which can also be attributed to the level of pressure on news output. Episodic-selective reporting increased across all media forms, mostly in the online sector, followed by television. As such, the public was presented with an even more piecemeal view of the world in 2011 than in 2010, with reality chopped up into discrete events and the emphasis on the very latest news. Compared with 2010, the subscription papers saw the biggest percentage fall for journalism with a context-based explanatory function (thematic-explanatory) across the various media types (see diagram 8). This means subscription papers delivered less thematic-explanatory reporting than public television during 2011 and were again less concerned with providing context, an area where they have traditionally been strong. The big rise in episodic reporting compared with the previous year, something experienced in the online sector too, makes it clear that the pressure on news output, an increasingly fast-moving news scene and a shortage of resources, particularly in terms of

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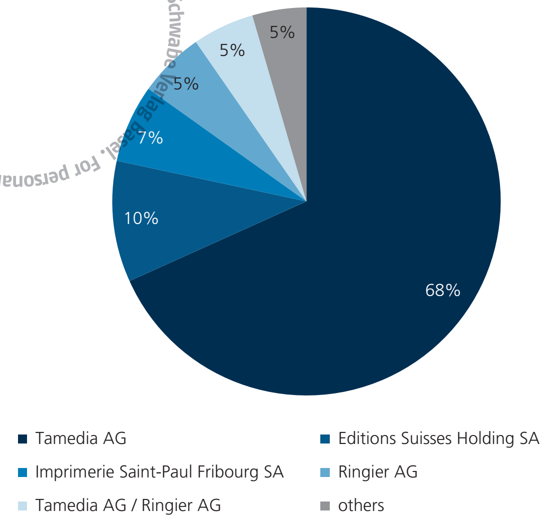

Diagram 10: French-speaking Switzerland – concentration within the press market

The aggregate circulation figures for all the significant press outlets in French-speaking Switzerland make up the market as a whole. The respective share of the controlling parties determines their market position. All press outlets which reach at least 0.5% of the population in the linguistic region are taken into account (other controlling parties: *Démocrate Media Holding, Gassmann AG, Nouvelle Association du Courrier*) (source of circulation figures: WEMF).
Interpretation example: Tamedia AG dominated the scene during 2011 with just short of 70% of the press market in French-speaking Switzerland.

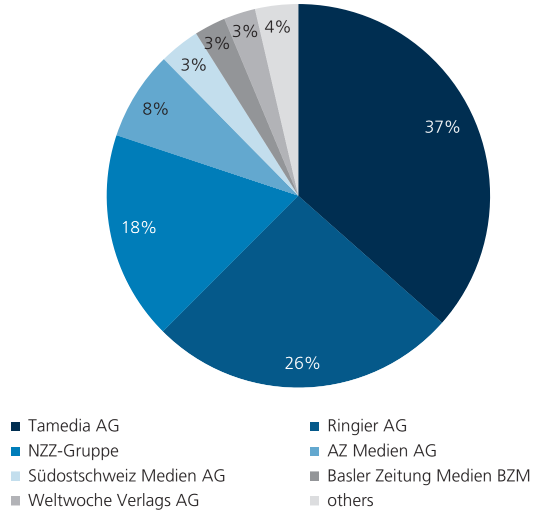

Diagram 11: German-speaking Switzerland – concentration within the press market

The aggregate circulation figures for all the significant press outlets in German-speaking Switzerland make up the market as a whole. The respective share of the controlling parties determines their market position. All press outlets which reach at least 0.5% of the population in the linguistic region are taken into account (other controlling parties: *Ziegler Druck- und Verlags AG, Zürcher Oberland Medien AG, Gassmann AG, Mengis AG*) (source of circulation figures: WEMF).
Interpretation example: Tamedia AG dominated the scene during 2011 with 37% of the press market in German-speaking Switzerland.

the Internet, are having a negative impact on the level of context provided. The online sector saw an increase of 16 percentage points in episodic reporting. The amount of online reporting dedicated to revealing the very latest news was as high as 70% in 2011 (see diagram 9). The online sector was most guilty of the general failure to provide context during the year of crises and upheaval that was 2011.

- *Online is the least relevant in terms of the issues addressed:* The issue agenda of the online media form features by far the highest soft news content of the various media forms. As far as online offerings are concerned, not only do soft news issues find their way into the top 20 communication events most often, but these also tend to select the most issues which promote the spread of soft news. The preponderance of sporting events is quite striking and even the royal wedding between Prince William and Kate Middleton made it into the 20 biggest communication events on the online agenda for 2011. The fast-moving production philosophy associated with 24/7 journalism and the focus on click rates lead to a disproportionate preference for short-lived soft news events, with hard news issues involving processes rather than events being under-represented.
- *More pronounced quality deficiencies in French-speaking Switzerland:* Users of the same media types in French-speaking Switzerland experience lower-quality journalism than in German-speaking Switzerland. This gap in quality between German- and Italian-speaking Switzerland on the one hand and French-speaking Switzerland on the other is largely the result of the greater level of media concentration within the press and online sectors, the associated reduction in the diversity of outlets and the fact that low-quality media are over-represented (news sites, *20 minutes*, tabloid papers, private broadcasters) (see diagram 4). As such, the competition in terms of quality is a lot lower in French- than in German-speaking Switzerland.

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2.2 Press

Media structures

- *The crisis in the press – structural aspects:* Significant structural aspects of the crisis in the press are the high level of concentration within the press market, the resulting contraction in terms of competition associated with benefits of scale and network synergies and the increasing financial difficulties caused by falling circulation figures. The last few years have seen *Tamedia AG* emerge as the clear market leader: it enjoys a monopoly in French-speaking Switzerland (68% market share), is the largest of the major players in German-speaking Switzerland, where competition is scarce (37% market share) (see diagrams 10 and 11), and has also been forging ahead into Italian-speaking Switzerland since September 2011 thanks to the newly launched free outlet *20 minuti*. Its position in the Swiss market is so strong that neither the more sizeable competitors like *Ringier AG* or *NZZ-Gruppe* nor medium-sized outfits like *Editions Suisses Holding SA* or *AZ Medien AG* have similar opportunities to grow. The small regional publishing firms do not present any real competition, owing to a lack of journalistic synergies. They are most affected by falling proceeds from sales – a situation compounded by a lack of alternative revenue options. As a result, the effects of limited competition within the Swiss press market can be seen in the rather uneven distribution of growth.
- *The crisis in the press – advertising funding:* The advertising revenue recorded by the press is decreasing compared with the year 2000, with the reduction exacerbated by economic slumps. In 2012, the press sector has to be content with around a third less advertising revenue than just twelve years earlier, with around 2 billion Swiss francs available compared with the previous 3 billion (see diagram 7: Net advertising revenue). The most recent fall during 2009, a result of the general economic climate, was nothing short of huge at around 500 million Swiss francs. Since then, only a limited recovery (just short of 100 million Swiss francs) has been possible. There has also been a certain amount of upheaval in the Swiss advertising market, not least because of the emergence of cross-media production structures and cross-media shifts in terms of advertising. Two groups have emerged in terms of the marketing of advertising, with *Publigroupe* and *NZZ-Gruppe* on the one hand and *Tamedia AG* on the other. This means the influence exerted by *Tamedia AG* is growing not only within the actual market for media offerings but also within the advertising market, particularly in terms of integrating regional publishing firms within advertising alliances. *Tamedia AG* also controls the press outlets which deliver the greatest revenue. In 2011, the free outlets *20 Minuten* and *20 minutes* and the albeit much less lucrative *Blick am Abend (Ringier AG)* pocketed no less than 31% of the advertising volume (gross advertising revenue) of all the 46 press outlets involved (see diagram 12). 43 outlets from the paid-for subscription and tabloid press have to divide the remaining 69% slice of the advertising pie between them, with only the Sunday/magazine media type able to just maintain its share. *Tamedia AG* has become very influential in terms of setting prices, both in German- and French-speaking Switzerland, and, more recently, in Italian-

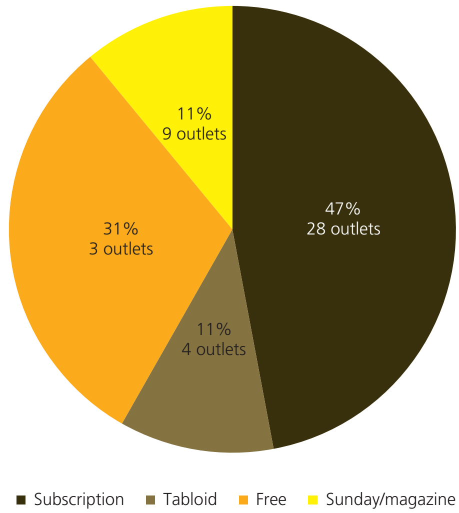

Diagram 12: Advertising statistics – gross advertising revenue broken down by press type

The diagram shows the share of the four press types in the gross advertising revenue for 2011. All press outlets which cover at least 0.5% of the population in the respective linguistic region are taken into account (no information available for *La Quotidiana* and *Le Courrier*) (source of data: Media Focus).

Interpretation example: The three free press outlets generated 31% of the advertising volume (gross advertising revenue) for all 46 press outlets considered during 2011.

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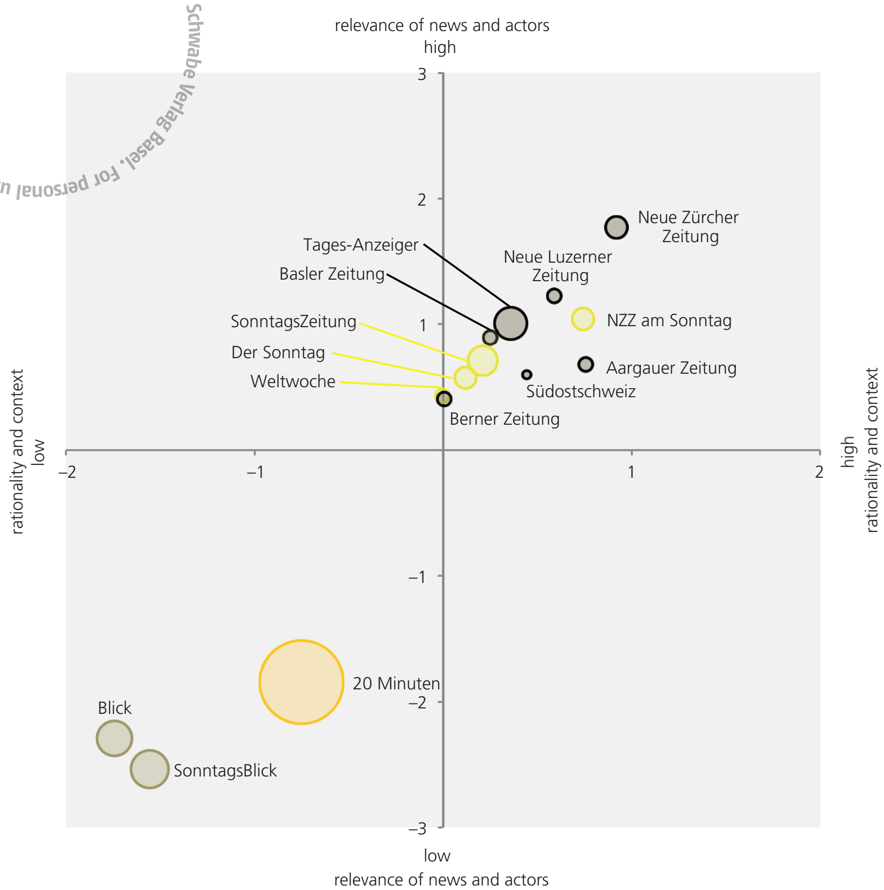

Diagram 13: Quality of front page reporting by the press in German-speaking Switzerland
The x-axis indicates the level of context and rationality and the y-axis indicates relevance (personalised soft news vs. non-personalised hard news). The size of the circle shows the coverage enjoyed by the press outlets in German-speaking Switzerland. Data set used: All press news stories in German-speaking Switzerland from the front page analysis based on the random sample for 2011 (n = 5230); source of data for circulation figures: WEMF. *Interpretation example:* The tabloid paper *Blick* is in the bottom-left quadrant. Its front page reporting shows significant deviation from the mean and must be classed as low-quality.

speaking Switzerland. The advertising industry is expecting massive pricing pressure in this part of the country with *Tamedia AG's* launch of its free paper *20 minuti* on the market.

- *The crisis in the press – diversity aspects:* Concentration in financial terms also means concentration in journalistic terms. In concentrated markets, the demand for a wide range of outlets to ensure diversity of content (external plurality) gives way to a demand for diversity of content within individual outlets (internal plurality). The kinds of subscription outlets and their controllers which pursue a policy of forum journalism – *NZZ-Gruppe* including its subsidiaries *LZ Medien Holding AG* and *Tagblatt Medien AG* in central and eastern Switzerland, *AZ Medien AG*, *Südostschweiz Medien AG* and *Editions Suisses Holding SA* – are key actors in preserving press diversity both alongside and in opposition to the market leader *Tamedia AG*. With the expansion of *Tamedia AG* into French-speaking Switzerland and the Berne area, it is becoming clear that the external plurality of its subscription outlets is decreasing as a result of synergy-based strategies.

Quality validation

- *Market success and loss of quality:* The success of the free papers not only means that these mass-market offerings, which cost nothing to buy but are associated with low quality, bring in a lot of money, but also that the better quality and more outlay-intensive subscription papers are less able to shore up their funding situation with proceeds from sales and advertising. In terms of quality, the tabloid and free press constitute one pole, while the subscription and Sunday papers and the magazine *(Weltwoche)* represent the other: differences in quality relate to rele-

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vance, transparency of sources and editorial input in terms of the information supply, as well as the relevance, provision of context and rationality in front page reporting. The gap in quality also emerges if the information supply is analysed: the more journalistic offerings with their bigger share of hard news, greater transparency of sources, bigger input and international outlook reach a smaller audience than offerings with a bigger share of soft news, lower transparency of sources, smaller input and a tendency to reduce world events to a series of catastrophes, scandals and wars.

- *Quality driven by journalistic competition:* Does journalistic competition, which favours diversity of information and opinion, still play a role in the market populated by the press outlets examined? In spite of the different conditions which apply to them, the subscription press, Sunday press and magazine *(Weltwoche)* ensure there is relevant problematisation and debating of solutions in the hard news sphere. This segment of the paid-for press appears to be the most influenced by journalistic competition, as shown by the quality analysis of front page reporting (see diagram 13). This segment is also witnessing a renaissance in the kind of press that promotes a particular world view *(Basler Zeitung, Weltwoche, Il Mattino della Domenica)*. *Weltwoche's* ideological stance is partly typified by the way it provides relevant information shot through with opinionated journalism as well as the way it discredits people and groups who adopt different positions. As such, this new form of ideology-driven journalism is rather different from the kind of newspapers controlled in the past by political parties or with close affiliations to them. These brought to bear the persuasive weight of their respective ideologies and generally targeted developments and structures rather than people. This renaissance will only see an emergence of diversity and persuasiveness if media outlets with this kind of ideological bent engage in a journalistic battle on a level playing field. There is no prospect, however, of the financial resources required for this. The free papers, largely without competition after a tough crowding-out process, do not tend to involve themselves in any purely journalistic competition. The free and tabloid press contribute little to the diversity of information and opinions as soft news is their main line of business and their reporting of hard news offers little in terms of sustainability or context. *Tamedia* and *Ringier*, the large media companies most interested in efficiency, synergies and financial returns, not only publish the six free and tabloid outlets with the lowest quality, but *Tamedia* offerings also populate the lower part of the middle range among the 15 other subscription and Sunday outlets considered in the quality analysis – with the exception of *Tages-Anzeiger*, its primary and flagship outlet.
- *Journalistic quality and resources:* The journalistic quality of press outlets is largely determined by structural and financial considerations. The journalistic quality of a press outlet falls if the journalistic resources available are inadequate. *Berner Zeitung*, which belongs to *Tamedia AG*, is one example where a lack of journalistic resources has led to poor quality scores. It has achieved the lowest journalistic quality among the subscription outlets in German-speaking Switzerland, because the resources available for the key sections of international, domestic and business reporting are inadequate (see diagram 13). All reporting of international news is bought in from the Swiss news agency *(sda)*.

2.3 Radio

Media structures

- *Broad coverage:* The various news programmes on private and particularly public radio cover around 60% of the population over the age of 15 across each of the three linguistic regions. Having said this, audience figures are falling for most information-based radio programmes. The aggregate audience for high-quality public radio only remains as high as in 2009 because it offers a few more programmes of relevance for recording purposes. On the basis of the data available, it would not be possible to say whether these losses in terms of "traditional" audience can be offset by other methods of use like podcasts or live streaming. However, data from surveys do indicate that the increasing audience for web-based radio is not making up for the loss of traditional audiences and also that this (slowly) increasing audience for web-based radio is benefiting public radio much less than private radio.

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- *Media policy framework conditions and an overview of the Swiss radio scene:* The various types of radio are subject to different levels of regulation and the effects of this are evident in the Swiss radio scene. As far as media policy is concerned, the deliberately strong position of *SRG SSR* is reflected in the fact that *SRG SSR* provides around half of all the most widely broadcast information-based programmes and thereby accounts for around 85% to 95% of the information market for radio (i.e. of the audience share of the most widely broadcast information-based programmes). However, the low share claimed by concession-holding private radio is not just a result of small concession areas meaning smaller audience groups, but also because this type of radio offers fewer information-based formats than *SRG SSR*. The largely non-regulated field of private radio, where radio stations are simply registered, does not produce information-based programmes in any real number.
- *Financial basis for the media:* The framework conditions in terms of media policy are associated with a number of problem areas for the various types of radio. Since media policy prevents the public radio of *SRG SSR* from broadcasting advertisements, public radio is more heavily dependent on fees than public television. Given this, ever more questions will be asked in future about potential new revenue streams for *SRG SSR* – particularly about offering content online. Private radio is having to hold its own in an advertising market which, although relatively immune to the state of the wider economy, is stagnating and remains small, a product of the media policy to keep concession areas fairly small. Even private radio stations partially financed by fees can only generate limited revenue, since these fees may only cover up to 50% of operating costs and may only be distributed among broadcasters which cater for especially small sections of the population.

Quality validation

- *High quality associated with public radio:* The analyses of stations promoted by the Federal Office of Communications (OFCOM) indicate that information plays a major part in the main stations offered by public radio. Taking a narrower view based on the relevant coverage of politics, business or culture, these issues account for anything from around 15% *(Rete Uno)* and 18% *(DRS1)* of a station's entire output to a very high 30% *(La 1ère)*. Generally speaking, this information is presented in a diverse manner with plenty of context and not just communicated in the form of (brief) reports. In addition, information-based output is also high in absolute terms, i.e. based on actual length of broadcasts. The quality validation of the main news programmes performed as part of the Yearbook shows that public radio pays attention to the relevant areas, particularly politics and culture, and much more so than private radio. Public radio ensures that important events from abroad also receive intensive coverage on the radio. This not only applies to violent conflicts and catastrophes, but also complex political (and economic) processes like the euro stability pact. Although hard news reporting on public radio, like private radio, focuses on the movers and shakers and is largely rational, public radio provides far more context than private radio, which mainly communicates issues and events via agency reports and hardly does anything to highlight causes and effects or place problems in a broader context (see diagram 14).
- *Differences between the linguistic regions in terms of public radio: La 1ère* stands out by having the most comprehensive information-based output as regards a station's entire output, while *DRS1* offers the best news programmes in quality terms with *Echo der Zeit* and *Rendez-vous*. *Rete Uno* is unable to stand out from the rest of public radio either with respect to its entire output as a station or its news programmes. For example, the relatively weak performance of *Radiogiornale 12.30* is fairly typical of *Rete Uno* as a whole. Conversely, the poor quality scores for *Le 12h30* contrast with the otherwise high level of information-based output and context provided by *La 1ère* (see diagram 14). The main stations in French- and Italian-speaking Switzerland tend to overlook economic issues. Compared with the main station in German-speaking Switzerland, they are more interested in cultural issues and less in human interest stories. These findings indicate that it is not only differences in resources that determine whether there is any significant information-based output but also the strategies adopted by the three main stations.

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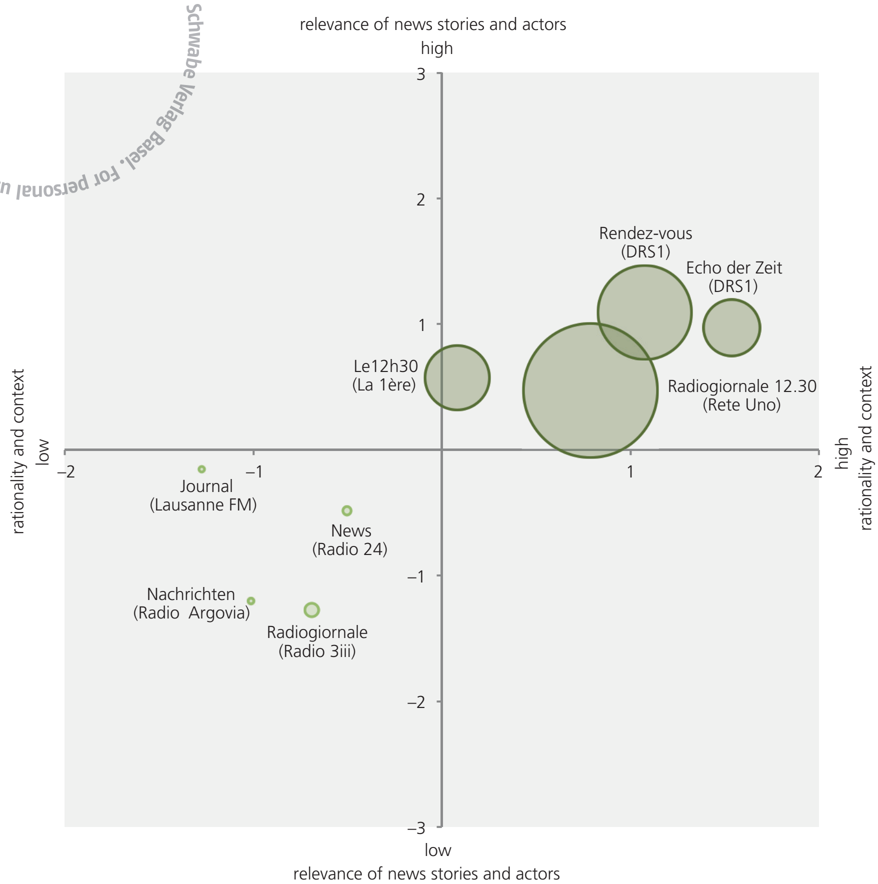

Diagram 14: Quality of lead story reporting on the radio
The x-axis indicates the level of context and rationality and the y-axis indicates relevance (personalised soft news vs. non-personalised hard news). The size of the circle shows the coverage enjoyed by the radio outlets in the respective linguistic region (the sizes of circles are only comparable within the same linguistic region). Data set used: All news stories from the radio lead story analysis based on the random sample for 2011 (n = 3099); data source for usage figures: Mediapulse.
Interpretation example: The news programmes of *Radio Argovia* and *Radio 3iii* are in the bottom-left quadrant. Their lead story reporting shows significant deviation from the mean in a negative direction.

- *Low information-based output on private radio:* As measured by the programme research promoted by OFCOM, the amount of reporting on politics, economic and cultural issues on private radio is 7%. Although the different time frames involved mean this low value is not directly comparable with the values for public radio (just 6 hours of the main broadcasting periods were studied daily for private radio, whereas 16 hours a day were studied for public radio), an internal re-analysis of the data in the Yearbook from the previous year shows that, in spite of different approaches in terms of the methodology used, the values from the OFCOM station analyses for private radio would be significantly lower than for public radio if a longer measurement period were used. This lack of emphasis on information is compounded on private radio by the fact that around half of the information concerned is presented in the form of brief reports, with private radio in many cases relaying agency reports rather than placing issues and events in context. The validation of the main news programmes on private radio also shows similar quality deficiencies. Although private radio also reports on the main hard news issues at both national and international level, it restricts itself to a few “hot topics” and, in terms of providing diversity on the relevant issues, is also limited by its tendency to focus more on sport and human interest issues than public radio does. In addition, private radio barely provides any context for these hot topics either. These findings do not quite tally with the concession, which demands that private radio make a substantial contribution to public service output at a regional level. So it would appear that either the focus on national and international issues or a general preference for soft news, or

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both, is preventing any substantial coverage of relevant events at a regional level. All in all, private radio in Switzerland makes only a limited contribution to relevant diversity and hardly contributes anything in terms of providing in-depth context for issues and events.

- *Lack of resources and a lack of self-imposed commitment to public service output on private radio:* Limited advertising revenue, also as a result of the media policy to keep concession areas fairly small and relevant from a federal perspective, means that many private radio stations are suffering from a permanent lack of resources. As such, private radio is finding it difficult to build and maintain the kind of structures required for a substantial offering of information-based journalism. In addition, a policy of targeting fee-based support at fairly small individual broadcasters with a low sales volume is not delivering any marked increase in the level of information-based output. Even the (few) broadcasters with low sales figures which do devote a lot of air time to political and economic issues as part of their local reporting do not have the resources to provide any relevant input of their own. But resources alone are not enough. It is also important for operators to feel an obligation to contribute to public service output: the benefits of scale enjoyed by the Zurich-based radio stations, which have more funds to employ journalists thanks to their larger concession areas and higher advertising revenue, do not translate into a bigger or more comprehensive information supply or a better quality supply. Similarly, the quality of the news programmes on larger private radio stations employing more journalists does not tend to be better per se. 2011 saw *Radio Argovia* with its relatively high sales figures make a similarly small contribution to quality as the smaller *Radio 3iii*. *Radio Argovia* pursues a strategy of attracting listeners by offering human interest stories from the region. And *Lausanne FM* – despite posting similar sales to *Radio 3iii* – again provided much less context (see diagram 14). The question thus arises, in media policy terms, of how to increase the practically non-existent self-imposed commitment many private radio operators feel towards public service with a view to improving the quality of local radio – apart from providing targeted support in the form of resources – or, as an alternative to this, how much responsibility fee-funded public broadcasters should assume for providing a basic coverage at a regional/local level. Since the dual system of broadcasting was introduced in Switzerland, there has been a failure on the part of private providers to generate sufficient resources and to establish their own concept of journalism based on professional and ethical self-imposed commitment.

2.4 Television

Media structures

- *Big audiences for SRG SSR information-based programmes:* Across all three linguistic regions, *SRG SSR* provides the great majority of the most widely broadcast information-based programmes within the television market. Taken together, its information-based programmes cover 54% (French-speaking Switzerland), 64% (Italian-speaking Switzerland) and 68% (German-speaking Switzerland) of the population. The various private operators involved in concession-holding private television are able to cover 8% of the population in German-speaking Switzerland and 7% in Italian-speaking Switzerland on aggregate with their information-based formats. In French-speaking Switzerland, no information-based programme on private television reaches at least 0.5% of the population over the age of 15. The small contribution made by private television can be partly explained by the limited broadcasting areas covered by concession-holding broadcasters and also by the fact that, with a few exceptions (mainly *Tele Züri),* the segment populated by private television companies which are only registered does not produce any widely broadcast information-based formats. As is the case with private radio, private television in Switzerland has not been able to establish a culture of information-based journalism.
- *Unequal opportunities in terms of advertising revenue:* The situation with regard to the advertising market for television broadcasters has developed in different ways for the various types of broadcasters concerned. *SRG SSR* broadcasters have seen their gross advertising revenue grow. Between 2007 and 2011 gross advertising revenue rose from around 507 million to 570 million Swiss francs (see diagram 15).

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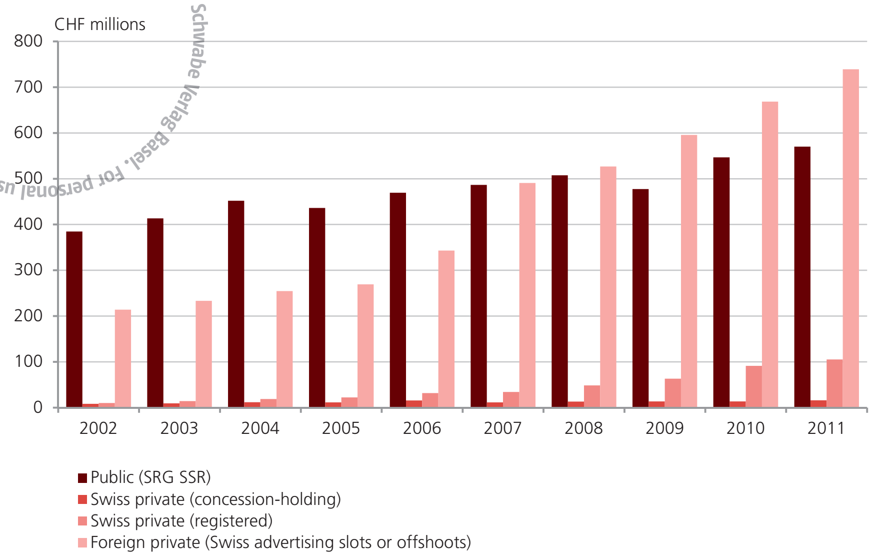

Diagram 15: Comparison of gross advertising revenue for television over time
The diagram shows how gross advertising revenue has changed between 2002 and 2011 for public broadcasters *(RSI LA 1, RSI LA 2, RTS Un, RTS Deux, SF1, SF zwei, SF info)*, concession-holding channels owned by Swiss private broadcasters *(Tele M1, Tele Tell* and from 2010 *Tele 1)*, registered channels owned by Swiss private broadcasters *(3+, Tele Züri)*, and advertising slots or Swiss offshoots of channels owned by foreign broadcasters *(Cartoon Network, kabel eins, M6, MTV, Nickelodeon, ProSieben, RTL, RTL2, SAT.1, Super RTL, VIVA Schweiz, VOX)*. Data source for gross advertising revenue: Media Focus.
Interpretation example: The aggregate gross advertising revenue for the public television broadcasters was 570 million Swiss francs for 2011; the equivalent figure for foreign private broadcasters with Swiss advertising slots or channels was 738 million Swiss francs.

Although the advertising market for (smaller) concession-holding private broadcasters is growing, it is nevertheless rather limited. For example, *Tele M1* achieved gross advertising revenue of just short of 8 million Swiss francs during 2011. The picture for the extensively deregulated segment where broadcasters are only registered is quite ambivalent. The broadcaster *3+*, which is purely entertainment-based, is able to generate average annual gross advertising revenue of 40 million Swiss francs, around five times as much as the regional concession-holding *Tele M1*. *3+* is also recording significant growth. By contrast, the gross advertising revenue of *Tele Züri* has fallen from 26 million Swiss francs in 2006 to 20 million (2011). The category of foreign private broadcasters with Swiss advertising slots, which also mainly focus on entertainment, not only managed to overtake *SRG SSR* in 2008 in terms of their gross advertising revenue, but are also benefiting the most from the latest growth. Taken together, the Swiss advertising slots of private broadcasters brought in gross advertising revenue of around 738 million Swiss francs during 2011, with *RTL* alone accounting for 179 million of this. As such, both *SRG SSR* and the concession-holding private television broadcasters are facing stiff competition in the advertising market from foreign private broadcasters, which can achieve high advertising sales volumes without this advertising revenue producing any benefits in terms of journalism (see diagram 15).

- *Limited resources for concession-holding private broadcasters:* The resources available to the 13 concession-holding private broadcasters are modest. Measured in terms of operating expenditure, these range from around 3.5 million Swiss francs *(Tele Bielingue, Tele Ostschweiz)* to around 10 million *(Tele M1)*. This means there is little to spend in editorial terms. Broadcasters from French-speaking Switzerland, like *Léman Bleu, TeleBielingue* or *Canal Alpha*, tend to figure among the "smaller" broadcasters in terms of their editorial/presenting budget with less than 10 full-time positions for editorial staff and presenters. It is mainly broadcasters from German-speaking Switzerland, like *TeleBärn, Tele Top, Tele 1,*

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Telebasel and *Tele M1*, which have access to greater resources in terms of personnel, with an average of up to twenty full-time positions for editorial staff and presenters. By far the "biggest" private broadcaster providing an information supply, however, is *Tele Züri*, which is only a registered broadcaster. Its operating expenditure totals 13 million Swiss francs, with 34 full-time positions for editorial staff and presenters. Having said this, bigger resources do not necessarily translate into a better quality information supply, as illustrated by *Léman Bleu* (see "Quality validation" below).

- *Significance of fees:* Since the money spent on advertising within the television market mainly goes to foreign private broadcasters followed by *SRG SSR*, the smaller, under-financed and concession-holding private broadcasters are heavily dependent on fees. This is particularly true of regional broadcasters in French- and Italian-speaking Switzerland. The new Radio and Television Act (RTVG) has massively increased the income these broadcasters receive from licence fees from 9% (average for 2002–2007) to 40% (2010). Around 70% of *SRG SSR*'s funding comes from licence fees. These fees enable *SRG SSR* to make a significant contribution to ensuring the various linguistic regions are evenly covered, with significant funds passing from German-speaking Switzerland into French- and Italian-speaking Switzerland. *RTS* generates 25.3% of *SRG SSR's* revenue and receives 32.6% of funds. *RSI* contributes 4.2% towards *SRG SSR's* revenue and receives 21.8% of funds.

Quality validation

- *Varying information-based output:* While public television boasts at least one broadcaster with an extensive range of information-based programmes for each linguistic region, the volume and diversity of information-based programmes from private broadcasters is rather modest. The daily, self-produced information supply of the private broadcasters as recorded under the study (news, weather, stock market and sports programmes, as well as magazine or talk shows) lasts on average some 3 hours and 44 minutes a week per broadcaster. But there are vast differences, not just in terms of the volume of what is on offer, but also in terms of the diversity of formats. Whereas *SF1* and *RTS Deux* in particular and also – in the form of repeats – *SF info* broadcast a wide range of magazine-type programmes, private television rarely shows magazine-type programmes with relevant content. The dominant content here, apart from news, mainly tends to be talk shows, which are much cheaper to produce.
- *Preference for soft news in information-based programmes from private broadcasters in German-speaking Switzerland:* The proportion of soft news in information-based programmes from (concession-holding) private television broadcasters varies significantly. *Tele Züri* devotes over half the reporting in its news and talk formats to human interest stories. The figure for *Tele M1* is considerably more than a third, with *TeleBärn* allocating more than a quarter. By contrast, the level of human interest reporting is decidedly low at *Léman Bleu* (3%), *Tele Ticino* (4%) and *canal9* (5%). So while the first set of private broadcasters referred to broadcast far more soft news than the public broadcasters, the latter group actually shows less soft news than the offerings from *SRG SSR*. The information-based programmes from *SRG SSR* place a greater emphasis on hard news. That said, human interest stories also find their way into the magazine and news formats, particularly on the main channels. In addition, the information-based programmes on public television feature more soft news than those on public radio.
- *Significant differences between the main news programmes as well:* The lead stories in the broadcasters' journalistic flagships, the main news programmes, also illustrate both the higher quality of reporting associated with public television and the big differences between *Züri News (Tele Züri)* and *Aktuell (Tele M1)* on the one hand and *Journal (Léman Bleu)* and *Ticino News (Tele Ticino)* on the other (see diagram 16). As well as broadcasting predominantly human interest and sports news stories, *Züri News* and *Aktuell* also adopt a moralising-emotive reporting style far more often and concentrate on more private and intimate issues. In addition, the news from both broadcasters features the lowest level of thematic-explanatory reporting, the kind that tries to establish connections between causes and effects. As such, the news programmes from private broadcasters fall into two groups as far as quality is con-

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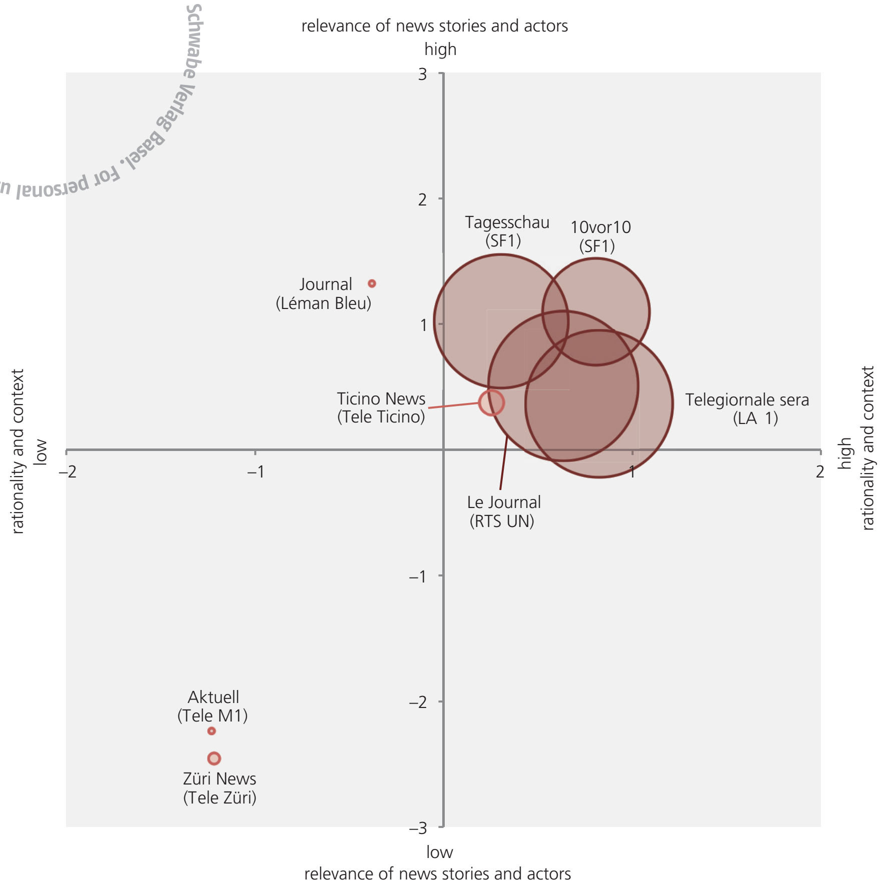

Diagram 16: Quality of lead story reporting on television
The x-axis indicates the level of context and rationality and the y-axis indicates relevance (personalised soft news vs. non-personalised hard news). The size of the circle shows the coverage enjoyed by the television outlets within the respective linguistic region (the sizes of circles are only comparable within the same linguistic region) (data source for usage figures: Mediapulse). Data set used: All news stories from the TV lead story analysis based on the random sample from 2011 (n = 3064).
Interpretation example: The news programme *Züri News* from *Tele Züri* is in the bottom-left quadrant. Its lead story reporting shows significant deviation from the mean in a negative direction.

cerned, although these groups do not reflect whether the broadcasters in question hold a concession and the performance mandate associated with this, nor do they reflect their financial resources.

- *Resources only have a partial impact on the quality of news programmes from private broadcasters:* It is worth noting that, although *Léman Bleu* has the lowest resources of all eight broadcasters studied in terms of personnel, this concession-holding private operator produces a news programme which is far superior across the full range of quality criteria to *Züri News* and *Aktuell* from broadcasters *Tele Züri* and *Tele M1* with all their resources and even compares well with the news programmes on public television based on some criteria. The only criterion where performance comes up short is provision of context, and this can be explained by the lack of resources for research. Assuming a basic level of funding is in place, it would appear then that self-imposed journalistic commitment is the main factor determining the quality of news programmes. In general, since the introduction of a dual system of public broadcasting, it has not proved possible to establish a mutually stabilising culture of information-based journalism among private providers.
- *Limited influence of the performance mandate:* It also appears that the performance mandate associated with holding a concession and receiving support in the form of fees has only a limited impact on quality. This can be seen by comparing the news provided by the concession-holding broadcaster *Tele M1* and the broadcaster *Tele Züri*, which is only officially registered. Despite having a performance mandate and support from fees, the quality of the news on *Tele M1* is about as low as for *Tele Züri* according to most quality criteria (see diagram 16).

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German-speaking Switzerland	Public	Private	Total
Revolution in Libya	19.0%	4.1%	15.7%
Parliamentary elections 2011	10.6%	26.6%	14.1%
Swiss energy policy	8.2%	11.6%	9.0%
Federal Council elections 2011	7.6%	11.2%	8.4%
Euro stability pact	9.8%	–	7.6%
Tsunami: nuclear power plant disaster in Japan	6.9%	7.1%	6.9%
Revolution in Egypt	7.6%	2.5%	6.5%
Asylum Act/RSFNA	3.1%	8.7%	4.3%
Massacre on Utøya / Breivik	3.0%	4.6%	3.3%
Conflict in Syria	4.0%	–	3.1%
State of Swiss economy	3.4%	0.8%	2.9%
Exchange rate policy: strength of Swiss franc	2.9%	1.2%	2.5%
Ski world championships/ Garmisch 2011	1.2%	5.4%	2.1%
UBS: crisis management	2.0%	2.1%	2.0%
EHEC pathogens	2.3%	1.2%	2.0%
Law on weapons/Ordnance weapons	1.1%	5.0%	1.9%
Strauss-Kahn sex scandal	2.5%	–	1.9%
KVG health reform	2.1%	0.8%	1.8%
Infinite Justice/War on terror	2.1%	0.8%	1.8%
Occupy Wall Street protest	0.6%	6.2%	1.8%

French-speaking Switzerland	Public	Private	Total
Revolution in Libya	20.0%	4.1%	18.9%
Parliamentary elections 2011	9.4%	13.5%	9.7%
Tsunami: nuclear power plant disaster in Japan	9.6%	5.4%	9.3%
Euro stability pact	8.8%	–	8.1%
Federal Council elections 2011	7.7%	5.4%	7.5%
Revolution in Egypt	5.8%	4.1%	5.7%
Swiss energy policy	5.0%	2.7%	4.8%
Strauss-Kahn sex scandal	4.7%	–	4.4%
Conflict in Syria	4.1%	1.4%	3.9%
Infinite Justice/War on terror	4.0%	–	3.7%
State of Swiss economy	3.0%	5.4%	3.1%
FC Neuchâtel Xamax: Chagaev case	3.4%	–	3.1%
Revolution in Tunisia	3.2%	1.4%	3.0%
Abduction of twins Alessia and Livia	2.6%	–	2.4%
KVG health reform	1.9%	6.8%	2.3%
Novartis: company performance	1.7%	6.8%	2.1%
Massacre on Utøya / Breivik	2.2%	–	2.1%
FC Servette Geneva: threat of bankruptcy	0.2%	24.3%	2.0%
FC Sion: legal dispute	2.1%	–	2.0%
Municipal elections for Canton of Geneva	0.6%	18.9%	2.0%

German-speaking Switzerland	Public	Private	Total
Parliamentary elections 2011	11.2%	20.9%	13.4%
Revolution in Libya	16.7%	1.3%	13.1%
Tsunami: nuclear power plant disaster in Japan	7.7%	2.5%	6.5%
Federal Council elections 2011	7.7%	1.3%	6.2%
Revolution in Egypt	7.1%	0.6%	5.6%
Swiss energy policy	5.8%	0.6%	4.6%
Elections for Canton of Ticino 2011	1.0%	15.8%	4.4%
EU immigration policy	5.4%	1.3%	4.4%
Euro stability pact	5.4%	0.6%	4.3%
Tax row, Canton of Ticino/Lombardy	2.5%	9.5%	4.1%
Pressure on Ticino as a financial centre	2.5%	9.5%	4.1%
State of Swiss economy	3.7%	5.1%	4.0%
KVG health reform	2.9%	6.3%	3.7%
Terror attack in Marrakesh	2.9%	5.7%	3.5%
Berlusconi government	4.4%	–	3.4%
Budgetary policy of Canton of Ticino	–	12.7%	2.9%
UBS: crisis management	3.3%	1.9%	2.9%
Exchange rate policy: strength of Swiss franc	2.9%	3.2%	2.9%
Italian national budget	3.5%	1.3%	2.9%
Conflict in Syria	3.7%	–	2.8%

Diagram 17: Television agenda for each linguistic region
The diagrams show the 20 biggest communication events (CE) for each linguistic region. The columns show how intensively the respective television type reported the top 20 communication events. Those CEs which only belong to the top 20 in one linguistic region have been highlighted. Data set used: For each linguistic region, all news stories on the top 20 CEs for the TV lead story analysis for the period from 1 January to 31 December 2011 (G: n = 1082; F: n = 1022; I: n = 678).
Interpretation example: The "revolution in Libya" communication event received the greatest amount of coverage in terms of the television agenda in German-speaking Switzerland. Based on all the public television news stories on the top 20 CEs, public television dedicated 19% of its reporting to the revolution in Libya.

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- *Integration role of public television:* The news programmes from *SRG SSR* influence the agenda for television news. Their main contribution is towards the reporting of international news. Similarly, the congruence of agendas across the different linguistic regions is largely attributable to the public television broadcasters. They help provide common denominators and thereby fulfil an important integration function across the language barriers in a multilingual country such as Switzerland. Given that the private and public broadcasters have different focuses, the agendas associated with the news programmes on public and private television vary significantly too. Only a third or so of the twenty main communication events on each can be found on both agendas. The content exclusive to the public television agenda mainly features international and economic (policy) issues. The content exclusive to the private television agenda, given the focus on political reporting at *Tele Ticino*, mainly features political events of relevance to the Canton of Ticino, as well as economic and cultural issues from this canton. Since the reporting from the two private broadcasters from German-speaking Switzerland, with its emphasis on human interest stories, offers little in terms of sustainability, they are unable to really influence the agenda.
- *Specific features of the agendas in the various linguistic regions:* Differences between the linguistic regions mainly emerge in their focus on regional political and sporting events in French-speaking Switzerland, whereas a lot of coverage in Italian-speaking Switzerland is devoted to political events in the Ticino and in Italy (see diagram 17). The agenda in German-speaking Switzerland typically features discussions about the politics of national identity, with private broadcasters placing them in a regional context and making them more personal and emotive.

2.5 Online

Media structures

- *Increase in online use:* The online market for information media grew during 2011. In particular, the news sites of media firms *Tamedia AG (20minuten.ch, 20minutes.ch, Newsnet)* and *Ringier AG (Blick.ch)* and the online portals with informative offerings such as *Bluewin.ch*, *GMX.ch and msn.ch* saw their usage figures rise (see diagram 18). Mobile consumption of news via smartphones and tablets also increased significantly during 2011. Key to this development are the new online offerings from the publishing firms and the increasing crossover between news media and the social web (especially *Twitter* and *Facebook*). According to figures from NET-Metrix, 46% of online users were already using mobile Internet as well during 2011.
- *Increasing concentration within the online market too:* The actors dominating the press and broadcasting market set the tone for the online sector too. Apart from the established media firms, and excluding the offer represented by the big online portals (including *msn.ch*, *GMX.ch* and *Bluewin.ch*), which leaves a lot to be desired in terms of journalistic quality, there are still no online news options with any significant resources or breadth of impact. Other online offerings which have joined the fray, like *infosperber.ch*, *journal21.ch* or even *tageswoche.ch*, have far fewer

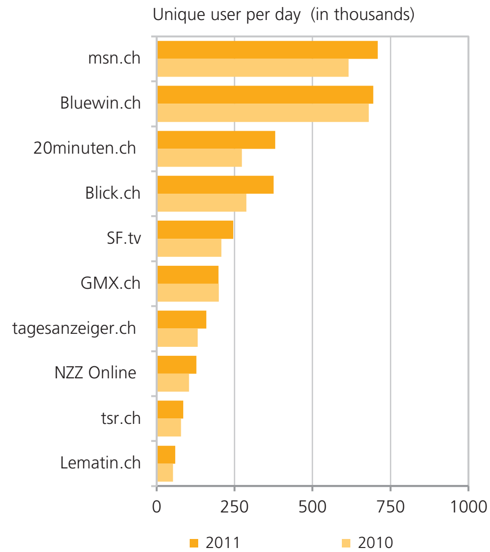

Diagram 18: Website usage for 2011: Top 10 compared with 2010
The diagram shows the 10 most frequently visited websites in Switzerland for 2010 and 2011. Data set used: Daily usage figures (unique users per day) for the relevant websites; data source for usage figures: NET-Metrix. The values used show yearly averages.
Interpretation example: msn.ch was Switzerland's most used information site during 2011; it has replaced *Bluewin.ch* (most frequently visited information site in 2010) at the top in terms of daily usage.

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Controlling party	2010	2011
Microsoft Advertising Schweiz	31,24%	30,78%
Tamedia AG	24,80%	28,40%
Swisscom	24,65%	21,10%
SRG SSR	16,64%	16,69%
Tamedia AG/Ringier AG	2,67%	1,73%
Editions Suisses Holding SA	–	1,30%
Total	**100%**	**100%**

Diagram 19: French-speaking Switzerland – concentration in the online market

The diagram shows how concentration within the online market in French-speaking Switzerland has changed between 2010 and 2011. The aggregate usage figures for all the significant information sites in French-speaking Switzerland make up the market as a whole; the respective share held by the controlling parties determines their market position. All Information sites which cover at least 0.5% of the population in the linguistic region are taken into account (data source for usage figures: NET-Metrix).

Interpretation example: Tamedia AG increased its market share in French-speaking Switzerland from a total of 24.8% to 28.4%.

users and resources than the major players. *Tamedia AG* in particular was able to expand its share of the online market across the board in all the linguistic regions during 2011 (in terms of both the attention-based and the advertising market). As such, *Tamedia AG* is now further increasing its market power in the online sector as well as in the press sector. The online market is already witnessing monopoly-like conditions, particularly in French- and Italian-speaking Switzerland: since the integration of the former *Edipresse* news sites *(24heures.ch, Tribune de Genève Online, Lematin.ch)* into the newly formed *Newsnet* and also as a consequence of the collaboration with *Ticinonline SA* in Italian-speaking Switzerland as part of the website of the newly launched *20minuti.ch*, *Tamedia AG* is now the only news site provider apart from Internet portals to offer its services across the various linguistic regions. Apart from the online portals of *Swisscom*, *Microsoft* and *SRG SSR*, the only remaining news sites with any significant user base in French-speaking Switzerland belong to *Tamedia AG*. This is a significant finding in terms of journalistic diversity in this region (see diagram 19). The largely identical content now also dominates the online news world in French-speaking Switzerland. In German-speaking Switzerland, only *Ringier AG*, with around half the market share of *Tamedia AG*, is able to offer any real resistance. The other controlling parties, *NZZ-Gruppe* with *NZZ Online* and *Basler Zeitung Medien BZM* with *bazonline.ch* (integrated into *Newsnet*), are much smaller players in the online market because of lower usage figures and online advertising revenue. In any case, the gulf between the big players and the other actors within the online form is even much wider than in the press. As such, some big providers in the press market (e.g. *Südostschweiz Medien AG* and *AZ Medien AG*) enjoy far smaller market shares in the online sector.

- *Lack of certainty in the online advertising market:* The online advertising market remains beset with uncertainty as far as the information providers are concerned. Although it regularly posts double-digit growth, with gross advertising revenue of 521 million Swiss francs it is only generating a fraction of the corresponding revenue recorded by the printed media market (the net sales volume for the press market for 2011 was around 2 billion Swiss francs) (see diagram 20). There is also uncertainly regarding the share of the advertising pie that the online information media will be able to secure in future. According to a study by PricewaterhouseCoopers for the media sector in Switzerland, the news sector (online newspapers) could only take 67 million Swiss francs' worth of this pie during 2010, which equates to less than 50% of the share for display advertising, an important factor for the news media, and only 15% of the online advertising market as a whole. The news sites are facing stiff and growing competition from high-profile and financially strong websites provided by actors from outside the sector such as *Microsoft (msn.ch)*, *Swisscom (Bluewin.ch)* or *United Internet (GMX.ch)*, as well as advertising-savvy U.S. companies such as *Google* and *Facebook*. These providers from outside the sector do not represent any competition to the news sites in journalistic terms, but they are competing against them in the advertising market. This can be seen in the growth of advertising money within the online sector, even if the data currently available for Switzerland do not tell us a great deal for the moment. Foreign studies show that the information media are reaping ever fewer of the benefits from the growth within the online market (paidcontent.org, 23.2.

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CHF millions	2005	2006	2007	2008	2009	2010	2011
Traditional online advertising (display*)	36.4	47.0	52.2	86.0	119.1	158.9	175.5
Search engine advertising	18.1	27.0	43.7	68.9	95.1	125.0	158.6
Affiliate marketing	–	5.0	7.5	8.3	8.8	8.7	10.4
Online classified advertisement market (jobs)	21.5	32.5	56.3	58.6	54.5	73.5	85.2
Online classified advertisement market (property)	22.3	30.5	39.3	44.3	47.9	52.4	56.0
Online classified advertisement market (cars)	9.0	14.0	24.5	34.0	34.0	33.6	35.1
Total online market	**107.3**	**156.0**	**223.5**	**300.1**	**359.4**	**452.1**	**520.8**

Sources: expert estimates; * extrapolation of Media Focus statistics on advertising impact.

Diagram 20: Developments in terms of advertising volume within the Swiss online market
The diagram shows how advertising volume has changed between 2005 and 2011, broken down into the various advertising forms within the Swiss online market (as per the Media Focus online advertising statistics report for 2011/02).
Interpretation example: With an advertising volume of 175.5 million Swiss francs, traditional online advertising (display) was the most important advertising form within the online market for 2011 in financial terms.

2012; economist.com, 20.3.2012). This kind of trend further jeopardises the business model for online journalism, which has so far been almost totally reliant on advertising revenue.

- *Increase in non-sector-specific activities: Tamedia AG* has now achieved a dominant position in the online market of the news sites as well as the press market. The online advertising revenue of the other players is a great deal lower. Not only does *Tamedia AG* generate above-average revenue with *Newsnet* and *20minuten.ch*, it also earns additional advertising money on websites like *tilllate.com*, *search.ch* or *homegate.ch*. Similarly, *Ringier AG* (*Scout* platforms) has been able to secure additional revenue sources beyond its core journalistic work through non-sector-specific activities.
- *Experiments with new funding models:* The uncertain situation in the advertising market (competition from players from outside the sector, widely varying yet generally relatively low online revenue) is lending real urgency to the search for a business model for online journalism which actually works. The intense debates surrounding the point and purpose of paywalls and the battle between the publishing companies and *SRG SSR* about the future role of the public service organisation in the online market reflect just how tense the prevailing mood has become. In spite of the huge challenge associated with the issue of funding, the online information market continues to be shaped by the "free culture". There are only a few online sites with fee-based models, such as those of *Schaffhauser Nachrichten* or *Le Temps*. The current year looks set to mark something of a turning point, however. After *NZZ-Gruppe*, a provider with a strong reputation, gave the market a boost in June 2012 by integrating its print and online editorial operations and introducing a paid-for website, *nzz.ch* – modelled on the *New York Times* – in autumn 2012, things are really expected to pick up in this area. After all, online revenue is just not enough to fund journalism with a focus on quality.

Quality validation

- *Quality deficiencies in online journalism:* The dominance of the free culture, the emphasis on click rates and a fast pace, and the weak earning potential within the online advertising market continue to hinder improvements in quality as far as the news sites are concerned. Online content remains deficient in terms of quality. The relevance of reporting, the level of own input and the provision of context are much lower than in the press. In particular, the low level of own input and context are clear indicators that there is still a lack of substantial investment being made in improving the quality of content. Other factors which drive down quality are the much faster pace of news production associated with 24/7 journalism and the emphasis on click rates. The online world leaves little time for in-depth research and the emphasis on click rates leads to an excessive amount of highly attention-grabbing soft news events.

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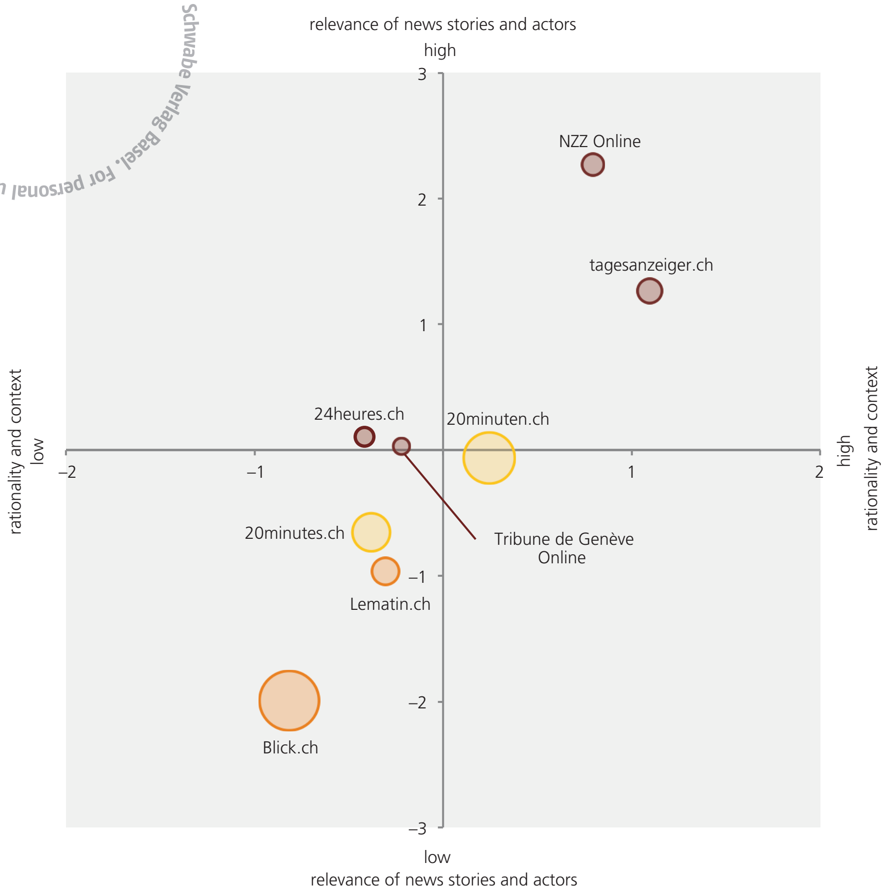

Diagram 21: Quality of front page reporting on news sites
The x-axis indicates the level of context and rationality and the y-axis indicates relevance (personalised soft news vs. non-personalised hard news). The size of the circle shows the coverage enjoyed by the online outlets in the respective linguistic region (the sizes of circles are only comparable within the same linguistic region). Data set used: All news stories from the online front page analysis based on the random sample from 2011 (n = 2822); data source for usage figures: NET-Metrix. *Interpretation example:* The tabloid online outlet *Blick.ch* is in the bottom-left quadrant. Its front page reporting shows significant deviation from the mean in a negative direction.

- *Most severe quality deficiencies associated with free and tabloid online offerings:* There are clear differences in quality between the various types of online offering (see diagram 21). The media outlets (tabloid and free news sites) attracting high numbers of users offer far lower quality than the online offerings from the subscription press, which have fewer users. The free and tabloid online offerings contain far more soft news. The differences in quality between the online offerings from the subscription papers and the free and tabloid papers are not the same across all the linguistic regions, however: the news sites from the subscription papers in French-speaking Switzerland *(24heures.ch* and *Tribune de Genève Online)* typically place considerable emphasis on regional/local events and feature more soft news content, which makes them inferior to the online offerings from the subscription papers in German-speaking Switzerland. Unlike their printed versions, the free and tabloid news sites differ in terms of the quality of their reporting. The online offerings from the tabloid papers deliver much lower quality than the corresponding offerings from the free papers, based on a direct comparison, given their greater share of human interest stories and the tendency of their reporting to focus on the personal and private. Overall, the news sites from the free papers would be ranked somewhere between the tabloid and subscription news sites in terms of the relevance of their reporting (see diagram 21). However, typical of both – the online offerings from the free and the tabloid papers – is the scant coverage given on the front pages of these news sites, in both German- and French-speaking Switzerland, to economic issues and issues involving economic policy, even when there is a major economic crisis.

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- *General quality deficiencies, even in subscription online offerings:* A striking feature is the considerable amount of content devoted to human interest stories across the various news sites. Although the relevant figure for the news sites from the subscription papers is considerably lower than for the free and tabloid online offerings, it is nevertheless much higher than the figure for the printed versions of the subscription papers. Equally as striking is the fact that all three types feature news stories focusing on somebody's role or personality with more or less equal frequency. It seems the news sites of the subscription press are barely able to rise above the news sites from the tabloid and free papers in this respect. Similarly, the three online types are broadly alike in terms of providing journalistic context (see diagram 21). The consistently low level of thematic-explanatory reporting underlines the lower quality of information-based journalism within the online form compared with the median of the other forms. So it appears the majority of printed press outlets offer a much better quality of reporting than their online equivalents. The only real exception is the online version of *20 Minuten*, which is actually better than its offline counterpart (see diagram 26).

2.6 In-depth study, "Swiss media during the election campaign. Quality of media reporting before the federal elections of 2011"

The issue and the methodology

This in-depth study focuses on the quality of reporting on the federal elections. The first part of this in-depth study concentrates on the attention given to the parliamentary elections compared with the Federal Council elections. This is examined on the basis of the twenty biggest communication events from each given year as featured in three newspapers from German-speaking Switzerland, namely *Blick*, *Neue Zürcher Zeitung* and *Tages-Anzeiger*, between the 1960s and 2011. The second part of the study contains a detailed analysis of the quality of political reporting of 29 Swiss press and online outlets during the six weeks before the federal elections of 2011. The quality indicators used are the degree of focus on the personal and private, the style of reporting and the temporality, i.e. the level of context provided by the reporting. The diversity of reporting is also validated through an analysis of the actors and issues.

- *Increasing significance of executive elections:* Taking a long view since the 1960s, it appears that parliamentary elections have become less significant during recent times, in relative if not in absolute terms, compared with the Federal Council elections, which are receiving increasingly intensive coverage (see diagram 22). The attention devoted to the parliamentary elections only scales the heights when specific sets of circumstances apply. Conflicts involving domestic politics, but above all provocative campaigns, can increase the level of attention paid to the parliamentary elections as 2007 showed in particular. Overall, the deliberative core of the political system, namely parliament, has started to receive relatively less coverage through media-driven communication than the executive, which begins to leave parliament rather in its shadow. In general, this trend is being accelerated by the commercialisation of the media and, especially, by the free papers. In fact, the 2011 parliamentary elections do not even make it into their top 20 communication events any more, with the free press devoting much more coverage to the Federal Council elections.
- *Quality of media reporting before the elections of 2011:* In the run-up to the 2011 federal elections, the media are again finding themselves exposed to multiple attempts to exploit them by political actors. The quality of media reporting during this important stage six weeks before the elections when political opinions are formed is ambivalent. One positive aspect is that, unlike the 2007 elections, it is not a case of just a few parties and issues dominating media reporting. Having said this, the media's failure to improve their political reporting, compared with the rest of the year, during this particularly important phase for the electorate just before the elections does present something of a problem. Although the reporting is mainly rational, it is predominantly episodic in nature and provides hardly any context. This is also apparent in the short shelf life of issues, with each being dealt with fairly intensively, and an election campaign that is split into pieces.
- *A comparison of quality across the media types:* The quality of the media differs fundamentally between

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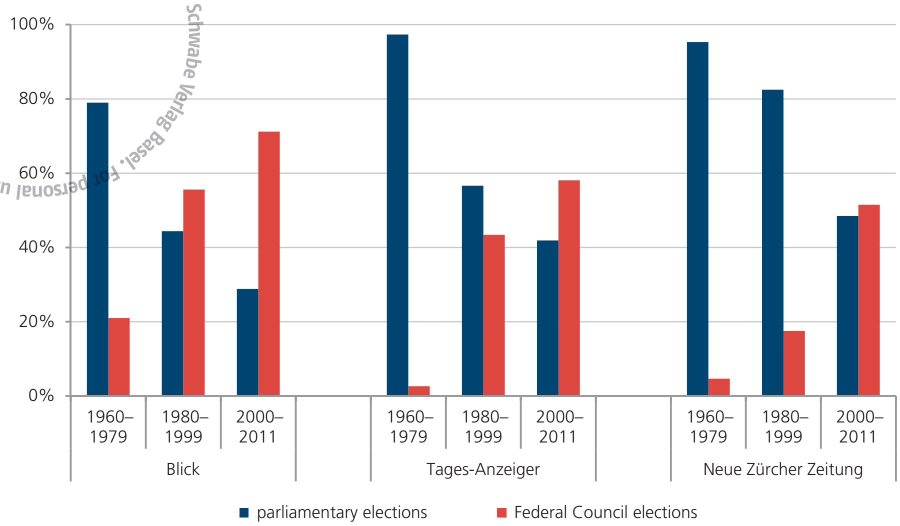

Diagram 22: Coverage of elections broken down by media outlet and time phase
The diagram shows for each media outlet the share of the coverage given to the parliamentary and Federal Council elections in terms of election reporting (making a total of 100%). Data set used: All news stories on election-related communication events surveyed as part of the top 20 communication events analysis for the period between 1960 and 2011 (n = 5480).
Interpretation example: Over time, the *Tages-Anzeiger* is devoting less attention to the parliamentary elections, while coverage of the Federal Council elections is increasing considerably.

media types and shows that specific forms of journalism are involved. These are determined by both the level of commercialism and the proximity or otherwise of the media to political camps. The subscription papers contribute the most in terms of quality, followed by *Weltwoche*, *WochenZeitung (WoZ)* and the Sunday papers, while the news sites and especially the tabloid and free papers are associated with quality deficiencies.

- *Subscription papers:* The subscription papers provide comprehensive political reporting in the run-up to the elections, which is more cognitive-normative, less concerned with the personal, and more thematic-contextual than the other press types. The subscription papers deal with a wider diversity of actors and issues, and both the coverage and the assessment of the actors is more evenly distributed than with the other press types. As has previously been the case with reporting prior to elections, here too the overall picture for the subscription papers is of a tendency towards a kind of forum journalism which provides some context (see diagram 23).
- *Weltwoche* and *WochenZeitung (WoZ):* The weekly outlets *Weltwoche* and *WoZ* represent something of a special case within the press scene (see diagram 23). Thanks to the comprehensiveness of their political reporting and the context they provide, they make an important contribution to the information available to citizens. Having said this, the two publications reveal limitations in terms of the diversity of the actors covered. The parties most closely aligned with or diametrically opposed to the ideology adopted by these publications receive the most coverage. These two outlets also feature the highest level of party-based reporting. The "friend or foe" approach means parties are rated either very positively or very negatively (*Weltwoche:* Swiss People's Party [SVP] positive; Conservative Democratic Party [BDP], Federal Councillor Widmer-Schlumpf negative; *WoZ:* Social Democratic Party [SP] positive; SVP/Free Democratic Party [FDP] negative). Clear differences emerge between the two media outlets in terms of the diversity of issues. *WoZ* confines its reporting to just a few issues (concerned with social and economic policy), although it does tend to focus rationally on structures and processes. By contrast, *Weltwoche* deals with a wider diversity of issues, although its reporting style is more moralising-emotive and confined to a few (prominent) personalities. As such, *Weltwoche* combines a journalism based on advocacy and a particular ideology with a leaning towards commercial media agendas.
- *Sunday papers:* The Sunday papers also deliver comprehensive and thematic-contextual political reporting. However, this reporting focuses more on personalities and moralising-emotive aspects than

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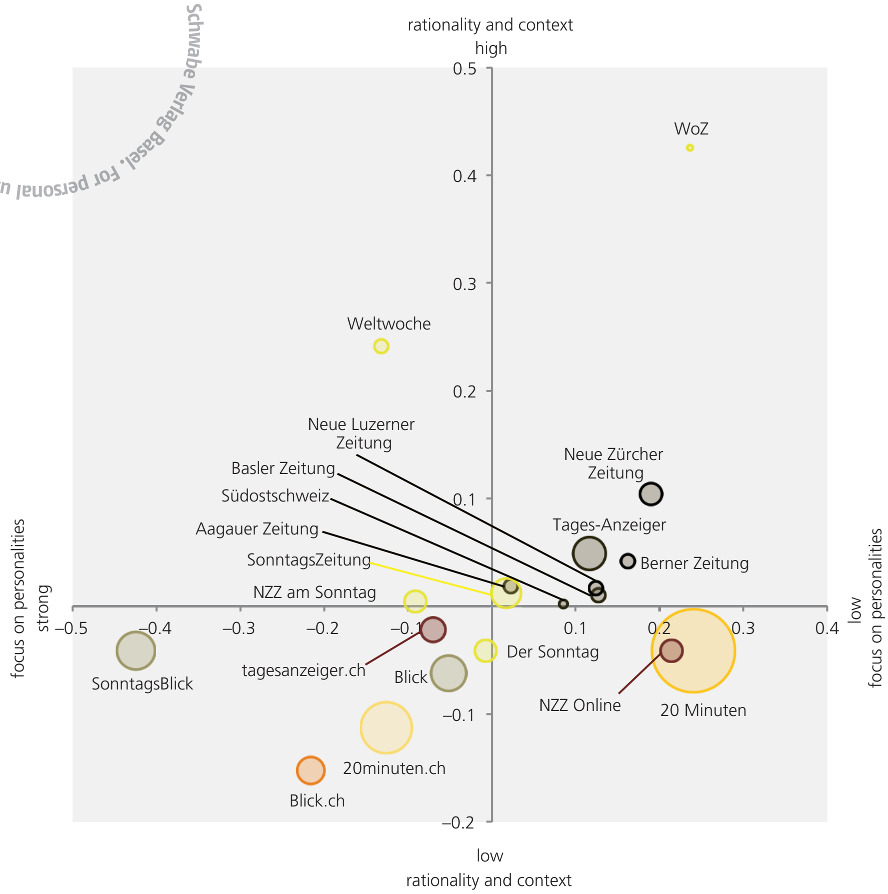

Diagram 23: Quality of political reporting in the run-up to the federal elections of 2011
The x-axis indicates the level of personalisation (focus on personalities, from strong to weak), while the y-axis indicates context and rationality (from individual events addressed in emotive terms to a rational description of the background). The size of the circle shows the coverage enjoyed by the outlets in German-speaking Switzerland (data source for circulation and usage figures: WEMF, NET-Metrix). Data set used: All German-language press and online news stories from the analysis of political reporting in the run-up to the federal elections of 2011 (n = 1425).
Interpretation example: WoZ was one of the media outlets which performed relatively well in terms of providing rational reporting with context. It also focused the least often on individual personalities. Its election reporting shows significant deviation from the mean in a positive direction.

the subscription papers (see diagram 23), and the Sunday papers also tend to treat the elections more like a "horse race" than do other publications, i.e. in line with the self-images displayed by the parties and by concentrating on the more combative aspects of the election campaign. This focus on newsworthiness and commercial media attitudes tends to reduce the diversity of actors and issues covered compared with the subscription papers.

- *Free and tabloid papers, news sites:* The free and tabloid papers and the various types of news sites are paying a below-average amount of attention to Swiss politics in the run-up to the 2011 elections. Where the issue of politics is dealt with at all, the diversity of actors and issues is only limited. Broadly speaking, it is just a case of reinforcing the "main narratives" which are already dominating the election campaign in the media. Even the more personal, episodic and, in many outlets, moralising-emotive reporting reveals media attitudes more concerned with providing teasers rather than actual content.

2.7 In-depth study, "Online news – a direct comparison between the quality of press and online outlets"

The issue and the methodology
This in-depth study analyses the quality of online reporting on the basis of a systematic comparison of selected press outlets and their news sites. A targeted comparison between the online edition and the relevant printed edition of a media outlet (e.g. *Tages-Anzeiger* and *tagesanzeiger.ch*) is used to point out any differences in quality between the press and online offerings.

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Whereas the introductory section to this Yearbook mainly presents the differences in quality between online offerings and the press at an aggregate level for the forms involved and the section on the online media form itemises the main differences in quality between the individual types of online offerings (subscription online, free online, tabloid online), this in-depth study examines the differences in quality between the online and press editions of individual outlets in detail and incorporates additional quality indicators. The first part of the analysis shows the various framework conditions for information-based journalism within the online and press sectors based on advertising figures and usage/circulation figures. A second part compares the online and press outlets in terms of basic quality aspects. Firstly, the online and press outlets are examined on the basis of quality indicators for relevance (relevance of news stories and actors), professionalism (rationality) and topicality (provision of context). The press and online outlets are then validated in terms of further attributes of professionalism, specifically as regards their own input and the transparency of their sources.

- *Quality deficiencies:* Given the big increase in usage and the convergence of information media on the Internet, it is important from a democratic perspective to ensure the level of quality associated with the printed press is extended to encompass the various online channels (news sites on desktop computers, smartphones and tablets). However, a comparative analysis of press outlets and their online equivalents shows a marked quality gap between print editions and news sites almost across the board. The hopes for high-quality online news journalism are mainly not being fulfilled. The kind of quality achieved offline in the paid-for press has so far not been replicated at all within the online sector. Quality online is not living up to the reputation achieved offline by the media brands.
- *Low level of own input, high level of paraphrasing:* Except for the two news sites of the free publications *20 Minuten/20 minutes,* not only do the online offerings publish far fewer news stories per day than their printed counterparts (an average of 74% of the press outlet output), but online reporting is also based much more heavily on agency reports and on news stories that are not identified than press reporting (66% online compared with 50% for the press). Similarly high online is the proportion of paraphrased news stories, i.e. news stories taken from other media and simply rewritten (an average of 13% of all news stories that are not identified editorially). This proportion is the highest for the news sites of the free papers *20minuten.ch/20minutes.ch* (at around 18%). But this practice is also widespread at the news sites

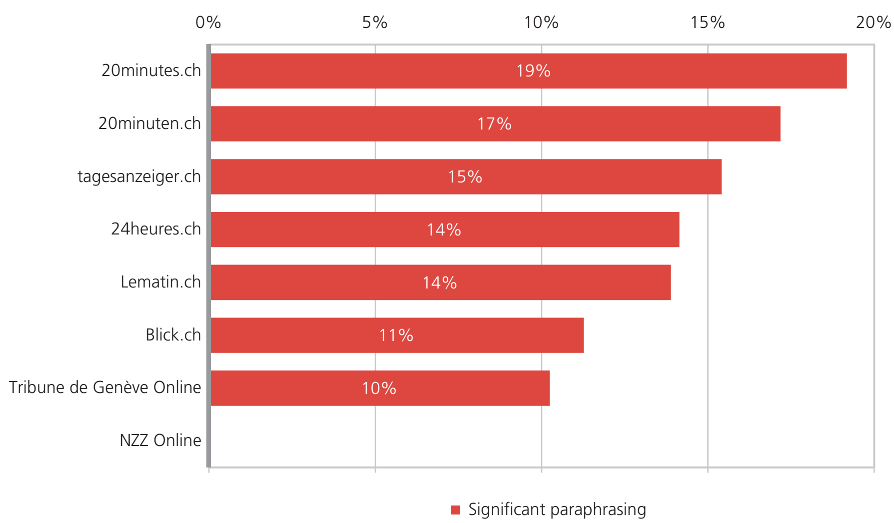

Diagram 24: Percentage of news stories containing paraphrasing but labelled as having been written by editorial staff
The diagram shows the percentage of news stories labelled as having been written by editorial staff but based on paraphrasing news stories published elsewhere. Data set used: All news stories from editorial staff across all sections based on a weekly sample from 19 to 25 September 2011 (n = 1749).
Interpretation example: 19% of news stories labelled as having been written by editorial staff at *20minutes.ch* are based on paraphrasing news stories from other media.

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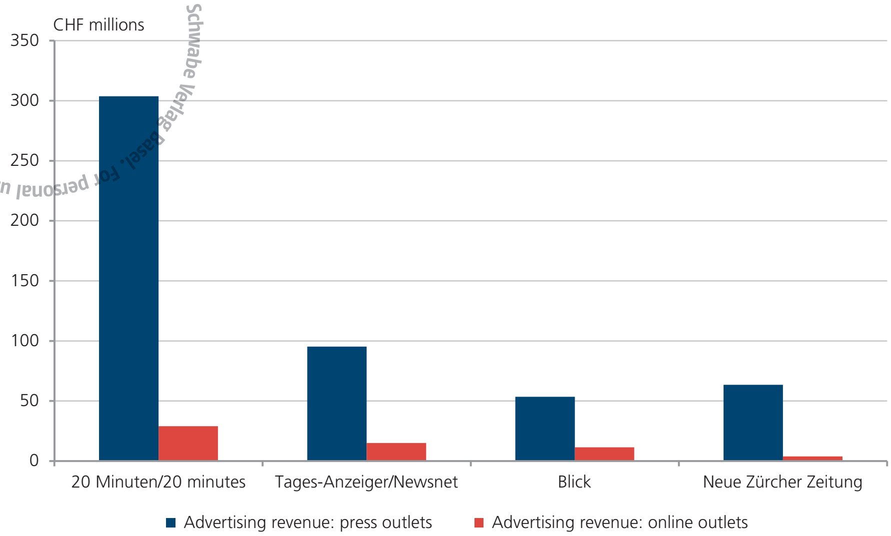

Diagram 25: Advertising revenue of press outlets and their online counterparts for 2011
The diagram shows the gross advertising revenue in CHF millions for the individual online and press outlets during 2011 (source: Media Focus advertising statistics, AdWizzard).
Interpretation example: NZZ Online generates 3.9 million Swiss francs of advertising revenue per year, while the *Neue Zürcher Zeitung* generates around 63.5 million Swiss francs. Online advertising revenue accounts for around 6% of the combined advertising revenue both online and offline.

of the subscription papers, i.e. *tagesanzeiger.ch* (15%), *Lematin.ch* (14%) and *24heures.ch* (14%) (see diagram 24). Since only those paraphrased news stories which actually cite their source were recorded here, it must be assumed that the true level of paraphrasing is much higher still. The low levels of own input also highlight the increased pressure on news output associated with click-rate journalism as well as the shortage of resources.

- *Low advertising revenue:* This lack of resources in online journalism ties in with the fact that advertising revenue in the online news sector remains low (see diagram 25). The press outlets generate a great deal more advertising revenue than individual online outlets. In terms of the total advertising revenue enjoyed by online offerings and the press, online advertising revenue accounts for between 6% and 18%. These results indicate that, as things stand, online journalism will require a tremendous amount of cross-subsidisation if it is to get anywhere near the quality of the press: either through financial support for news sites with surpluses from other revenue streams or by providing reporting content from the offline sector.
- *Online reporting less relevant than press reporting:* With a few exceptions *(20minuten.ch, Lematin.ch)*, press news stories tend to be much more relevant than those of online outlets (see diagram 26). As such, the press outlets continue to do far more to promote public communication than the online outlets, which focus much more on human interest stories and sport than on political and economic issues.
- *Less context provided in online reporting than press reporting:* The online outlets also lag behind the printed editions in terms of the important professional standards of rationality and the provision of context. Again with the same exceptions *(20minuten.ch, Lematin.ch)*, press news stories tend to be more rational and provide more context than online (see diagram 26). Apart from the greater focus on breaking news, the online media hardly ever use the services of correspondents, and analysis-based news stories and comment are something of a rarity.
- *Considerable deficiencies in French-speaking Switzerland:* The gulf between the quality of offline and online offerings is particularly pronounced in the *Tamedia* outlets in French-speaking Switzerland (see diagram 26). This is even more of a problem given that the level of quality in French-speaking Switzerland is lower than in German-speaking Switzerland in any case. The hegemony enjoyed by *Tamedia AG* and the more advanced level of media concentration compared with German-speaking Switzerland mean there is less competition in terms of quality in French-speaking Switzerland.

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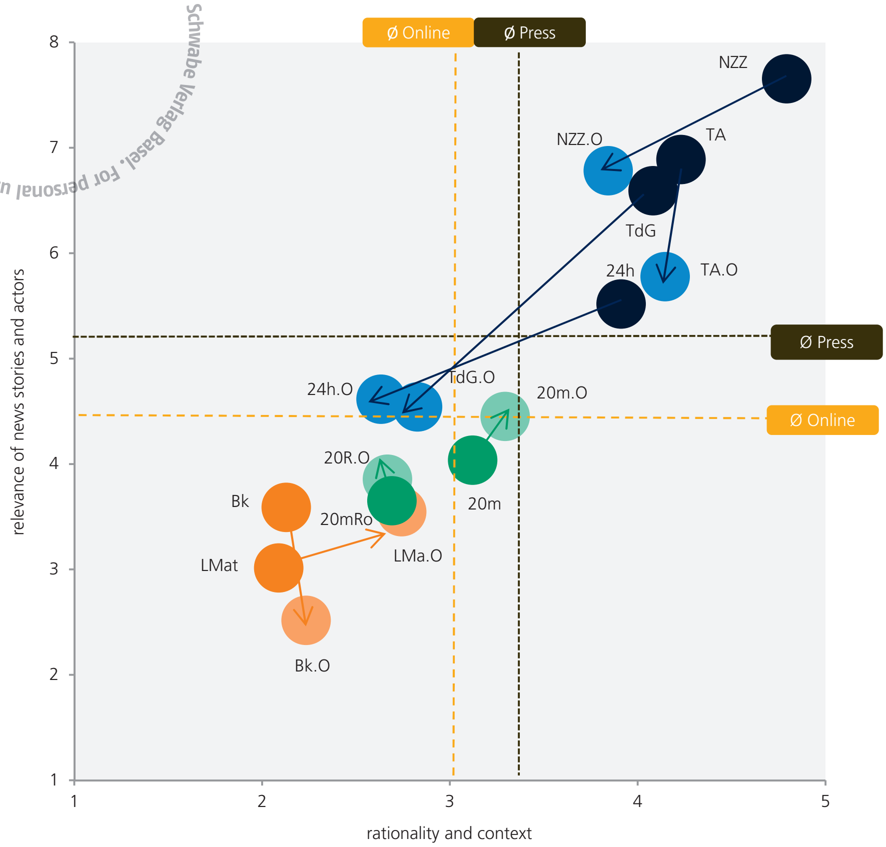

Diagram 26: A comparison of the quality of front page reporting between offline and online
The x-axis indicates the level of context and rationality and the y-axis indicates relevance (personalised soft news vs. non-personalised hard news). Data set used: All news stories from the front page analysis based on the random sample for 2011 (n = 6058).
Interpretation example: The press edition of the *Neue Zürcher Zeitung* is better positioned than the news site of the *NZZ* in terms of both the rationality and context of its reporting and its relevance.

Abbreviations of media outlets
German-speaking Switzerland: 20m: 20 Minuten; 20m.O: 20minuten.ch; Bk: Blick; Bk.O: Blick.ch; NZZ: Neue Zürcher Zeitung; NZZ.O: NZZ Online; TA: Tages-Anzeiger; TA.O: tagesanzeiger.ch
French-speaking Switzerland:: 20mRo: 20 minutes; 20R.O: 20minutes.ch; 24h: 24 heures; 24h.O: 24heures.ch; LMat: Le Matin; LMa.O: Lematin.ch; TdG: Tribune de Genève; TdG.O: Tribune de Genève Online

- *Low level of commitment to online offerings:* The gap in quality between offline and online offerings indicates the publishing firms have still to really commit to a kind of online journalism which meets professional standards, as well as highlighting the unresolved problem of funding. Only the online offerings of the free papers and to a lesser extent those of the tabloid papers deliver better quality than their printed counterparts. Although the free papers *20 Minuten/20 minutes* generate, with 303.4 million Swiss francs, more than ten times the gross advertising revenue of their news sites (29 million Swiss francs), the quality of their news sites is much better than the printed editions based on individual quality criteria. It can therefore be assumed that the news sites of the free media are being cross-subsidised with revenue from the printed editions. It is important to put this into perspective, however, and note that the additional resources made available are mainly invested in sections of relatively little significance in terms of promoting the democratic function of public communication: the areas where the free news sites are particularly strong are human interest stories and sport.

2.8 In-depth study, "Crime reporting in the Swiss press"

The issue and the methodology
This in-depth study focuses on the changing level and quality of reporting on both crime and the fight against crime within the printed media. The first part of this

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in-depth study focuses on how the level of crime reporting has changed over the long term based on the period between 2002 and 2011. One area of interest is the influence exerted on the agenda of both politicians and the wider population (surveys) when crime reporting increases. The second part of the study compares the frequency of reporting based on both offence and offender categories with the crime statistics held by the police. The aim is to identify the categories of crime which are the most newsworthy and those which are either over-represented or under-represented in relation to actual crime statistics. The third part looks at the reporting on the revision of the general section of the Swiss Criminal Code (Allgemeiner Teil des Schweizerischen Strafgesetzbuches – AT-StGB) to show the impact of the crime reporting analysed in the first part, with its specific areas of focus and patterns of interpretation (e.g. "soft justice"), on the legitimacy conferred on how legislation is made and justice is administered.

- *Increase in crime reporting:* The long-term study of crime reporting in the three key media of *NZZ*, *Tages-Anzeiger* and *Blick* during the period between 2002 and 2011 shows reporting levels demonstrating a wave-like increase (see diagram 27). Changes in reporting level are significantly affected by the political campaigns of the SVP and journalistic strategies, specifically those adopted by the tabloid publication *Blick*. Changes to the senior editorial staff at *Blick* appear to have a significant impact. Another factor behind the changes is the politicisation of crime. The rape of a schoolgirl in the Seebach area of Zurich at the end of 2006 has proved to be a key event. The case was exploited by the media and, particularly, by leading SVP figures. Following this episode, the issue of immigrant crime in general and crime committed by young immigrants in particular were high on the agenda for the federal elections of 2007.
- *Parallels between the reporting of crime and the population's perception of the threat of crime:* Comparisons with data from surveys (gfs-Bern, Sorgenbarometer) show the population's perception of the threat of crime is influenced by the media and politicians' tendency to make an issue of crime. The perception of the threat of crime has developed largely in line with the intensity of reporting and political campaigning between 2002 and 2011 (see diagram 27).
- *Serious violent offences over-represented in relation to actual crime statistics:* A comparison between crime reporting and crime statistics held by the police for 2011 shows that violent offences against life and limb are the most over-represented in the section of the press examined compared with police statistics (+26.4 percentage points [PP]) (see diagram 28). This over-representation is particularly noticeable with killings. Such offences receive 434 times the media coverage they should in relation to actual crime statistics. The media coverage of serious violent crimes also presents a much more threatening picture than the actual crime statistics would justify. The media devotes a tremendous amount of coverage to killings involving offences of a sexual nature. Sexual offences (where the victim is not killed) are also over-represented in relation to actual crime statistics (+10 PP). Sexual offences against children receive significant attention. These receive 15 times the media coverage they should in relation to actual crime statistics.
- *Tabloid papers:* Of all the press types studied, tabloid papers feature the highest proportion of reporting on crime. This reporting is generally of poor quality. The focus is very much on events, mainly on how the actual crime was committed; there is little context, and the tone is highly moralising-emotive. Tabloid papers are particularly good at presenting the offence in an attention-grabbing and emotionally charged way in the actual headline and giving it a political dimension (e.g. "Kosovan Slits Wrestler's Throat", *Blick* 30.11.2011). Of all the press types, the tabloid papers are the most guilty of over-representing violent crimes in relation to actual crime statistics, particularly killings (+36 PP) and sexual offences (+11.4 PP where the victim is not killed) (see diagram 28). Whereas *Blick* mainly over-represents violent crimes, *Sonntagsblick* does the same for sexual offences – particularly where the victims are children. As with the free paper, there is a tendency to discredit the defendants where these kinds of offences are involved (e.g. "sex fiend", "chatroom predator").
- *Free paper:* The free paper *20 Minuten* is the second biggest crime reporter for 2011 after the tabloid outlets. Here too there are significant quality deficiencies: the reporting is highly episodic; again, the main

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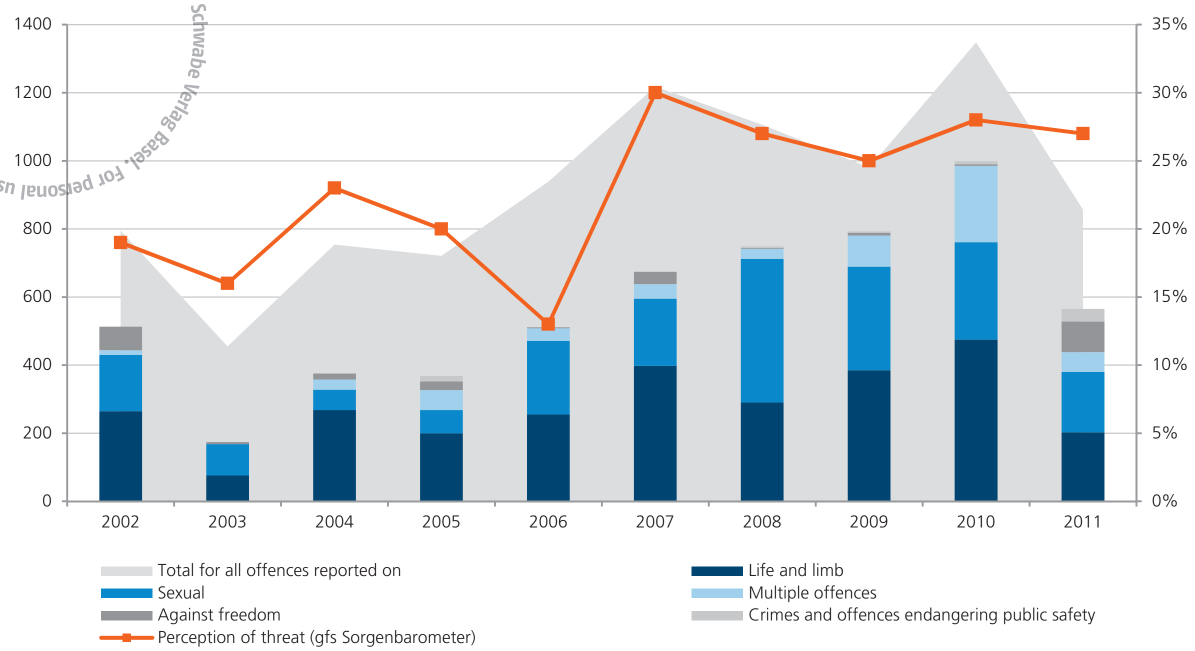

Diagram 27: Intensity of reporting and public's perception of threat
The diagram shows the intensity of crime reporting as a whole (light grey) and in terms of serious types of offences (blue/grey columns) compared with the public's perception of the threat (red line). The perception of the threat has been recorded as a percentage of those citizens who told the annual survey conducted by gfs.bern that their personal safety, which they believed to be threatened by crime, was one of their biggest issues.
Interpretation example: Between 2006 and 2007 the total number of news stories on crime recorded (total for all offences reported on, light-grey area) increased from 939 news stories to 1218 and the number of news stories on serious offences against life and limb (dark-blue column) increased from 255 to 398. During the same period, the percentage of those surveyed who felt threatened by crime (red line) increased significantly from 13% to 30%.

focus is on how the actual crime was committed with little attention paid to the legal proceedings, there is a lack of background and the level of own input is the lowest among the various press types. The free paper is the second most guilty of over-representing sexual offences in relation to actual crime statistics after the tabloids (+10.5 PP where the victim is not killed), with paedophilia offences being covered particularly frequently (see diagram 28). Here too a defamatory and moralising attitude is adopted towards the defendants (e.g. "predatory paedophile", "porn-scandal teacher"). Of all the press types, the free paper is most guilty of under-representing low-relevance, minor offences against property in relation to actual crime statistics (–39.6 PP). Free papers mostly use this type of offence to generate cheap copy by basing their reporting on agency or police reports.

- *Subscription papers:* The subscription papers devote less reporting to crime than the free and tabloid papers. Crime reporting in the subscription papers has a noticeably regional flavour: criminal offences are mainly covered in the respective regional sections. In terms of individual outlets, big differences emerge between the three subscription papers recorded. As far as crime reporting is concerned, *Tages-Anzeiger* is similar in some aspects to the tabloid and free papers. For example, *Tages-Anzeiger* even provides a slightly higher proportion of crime reporting than the free outlet *20 Minuten*. Similarly, *Tages-Anzeiger* is almost as guilty of over-representing violent crimes in relation to actual crime statistics as *Sonntagsblick* (+26.2 PP). Having said this, *Tages-Anzeiger* adopts a much more rational style than the tabloid and free outlets.
- *Weekly media:* In terms of the press types, the press publications *Weltwoche* and *WochenZeitung (WoZ)* contain the most news stories providing context, with *WoZ* providing much better context around both offenders and offences. With both, the tone of crime reporting is highly moralising-emotive,

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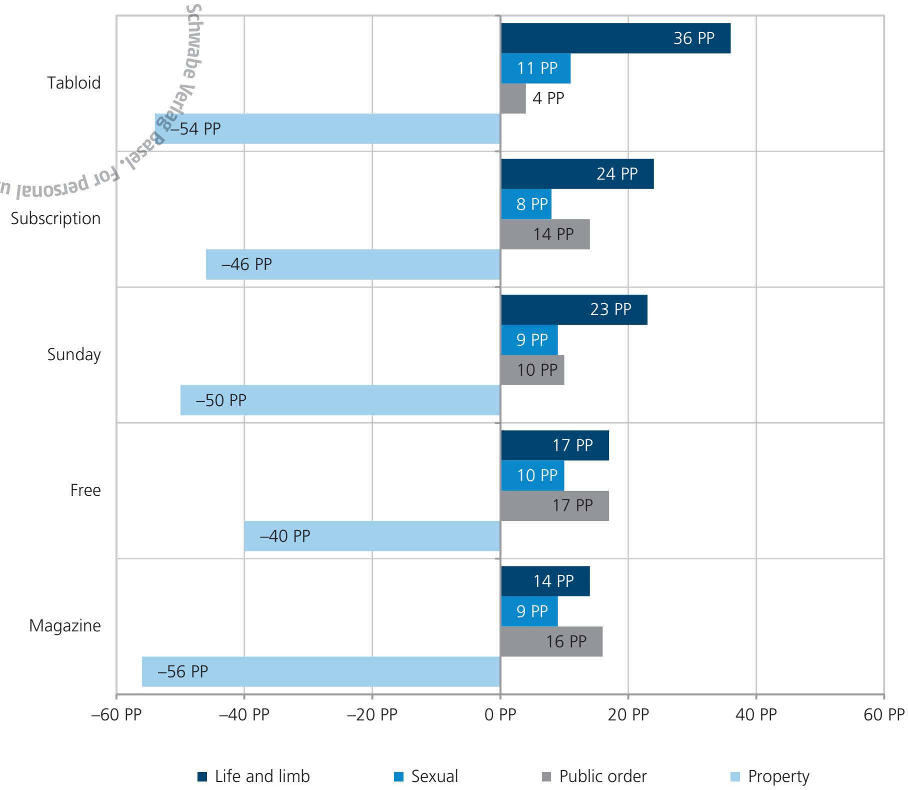

Diagram 28: Types of offence reported on compared with actual crime statistics
The diagram shows the over- or under-representation of some of the offence types in the Swiss Criminal Code (life and limb, sexual, public order and property) in the media reporting of the various press types compared with the crime statistics held by the police during 2011.
Interpretation example: For the tabloid papers press type, serious violent offences, i.e. offences against life and limb, are over-represented by 36 percentage points compared with the crime statistics held by the police.

although here this is more pronounced for *Weltwoche*. The selection of crime incidents and the form of reporting used by both outlets are indicative of an editorial line heavily influenced by a particular ideology. With both these press outlets, the most over-represented category of offence in relation to actual crime statistics is that of public order offences (+15.6 PP) (see diagram 28). Whereas *Weltwoche*, in keeping with its right-leaning, conservative line, focuses on violence committed by the extreme left among other things when dealing with this category, the left-leaning, more alternative *WoZ* highlights things like the problem of hooliganism and what politicians are doing to tackle it.

- *Quality of reporting on the revision of the general section of the Swiss Criminal Code (AT-StGB):* The media's focus on serious offences against life and limb and on sexual offences also influences the discussion about the adequacy of legislation and how justice is administered. The discussion about the revision of the AT-StGB, which among other things includes introducing financial penalties rather than short prison sentences, highlights the interdependence of political and media agendas. Following the killing of a young woman by an offender with a criminal record (case of Lucie T.), the discussion about the revision of the AT-StGB intensified overnight. The tabloid and free papers take up the issue of the revision and mainly focus on the kinds of positions adopted by the political parties which are newsworthy because of the way they heighten conflict. This alters the tone of reporting considerably. What began in the interregional subscription press as a debate between experts in a rational reporting style gives way, as a result of the political overtones surrounding this killing, to a kind of reporting which is focused on party-political arguments and, thanks to the free and tabloid papers, more episodic and highly moralising-emotive in tone.
- *Diversity of the arguments surrounding the revision of the general section of the Swiss Criminal Code (AT-StGB):* Arguments against the revision dominate

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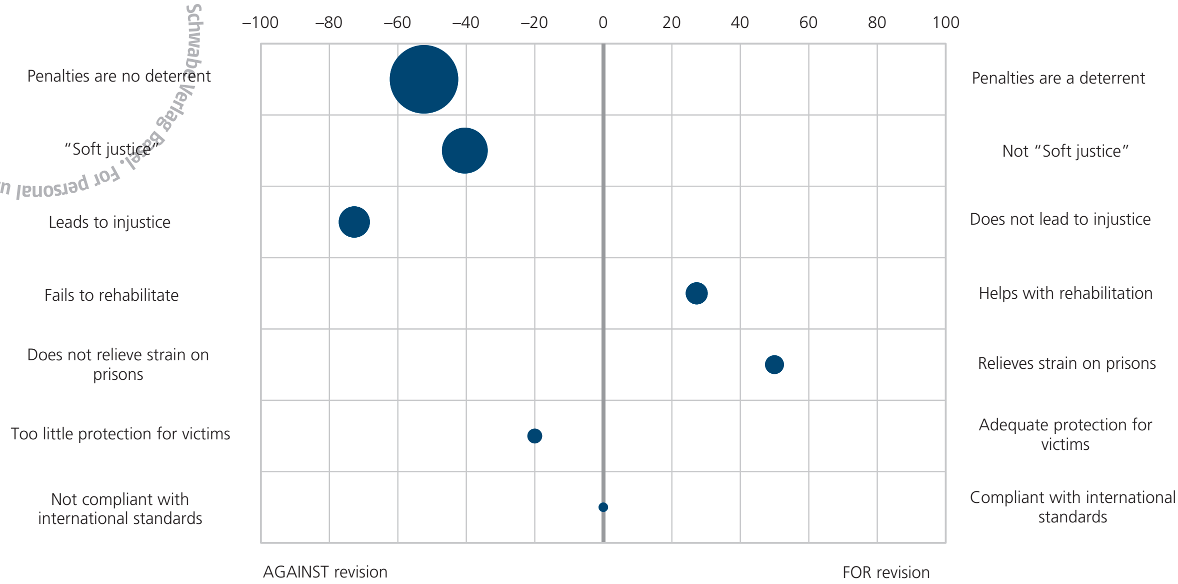

Diagram 29: Interpretive perspectives in the debate about the revision of the AT-StGB
The diagram shows the various interpretive perspectives on the revision of the AT-StGB in media reporting terms during the whole of the period under investigation (1 January 2007 [date of entry into force] until 31 October 2011). The position along the line between the pair of for and against arguments in each case is plotted against the x-axis. The size of the circle indicates the coverage enjoyed by the respective interpretive perspectives; the bigger the circle, the more coverage the argument received.
Interpretation example: "Soft justice" is the second most common interpretive perspective. The value at around –40 along the x-axis indicates that the position which claims that the revision smacks of "soft justice" has clearly gained more currency than the position which argues that the revision does not herald "soft justice".

reporting and are increasing significantly as time goes on. The argument against the revision receiving the widest coverage is the one that claims financial penalties do not act as a deterrent to offenders. The second most common argument against the revision discredits it in a generalised way as an example of "soft justice" (see diagram 29). This argument is mainly put forward by actors within the political parties, as well as by the free and tabloid media, and is managing to gain some currency in connection with the Lucie T. case. Nowadays, the only dissent against this populist argument is voiced by the experts and sections of the subscription press. In terms of the printed media types, it is clear the free and tabloid media not only cover a less diverse range of arguments, they also tend to relay the generalised criticism of the revision ("soft justice") from the actors within the political parties without even questioning it.

2.9 In-depth study, "Media criticism in Switzerland – an appraisal"

- *Relevance of media criticism:* Media criticism involves observing, describing and assessing media and their contribution to society. The field of communication and media studies stresses the relevance of public media criticism in terms of the significance of journalistic media and the power of interpretation they enjoy within democratic societies. Two of the main reasons it is vital for the public to have a debate about the contribution made by journalism and the framework conditions involved are as follows. Firstly, descriptions of reality are always contingent, i.e. are not the only possible ones, and secondly, this debate reminds the actors involved in constructing reality for the public of their responsibilities.
- *Media journalism caught in the trap of self-observation:* For media criticism to be effective there must be some reflexivity between the observers and the

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observed. This is only possible if there is interaction, with the media themselves responding publicly to assessments and thereby turning observations made by third parties into self-observation. As such, it would be desirable if journalism were able to observe the media system with the same critical gaze it normally applies to other areas of society. However, empirical studies show that authorities which criticise the media from the outside barely receive any media publicity – media criticism tends to be left in the shadows. The processes of concentration and commercialisation create institutionalisation problems in terms of the journalistic media providing any media criticism.

- *Media blogs are no substitute:* Given the inadequacy of media journalism and complaints regarding the "permanent state of crisis" it is perceived as being in, it is hardly surprising that interest is being shown in the effectiveness of what are known as media blogs under the buzzword "Medienbeobachtung 2.0" (Media observation 2.0). As the findings of initial studies show, however, media blogs do not provide any kind of miracle cure in terms of public media observation. Their low degree of institutionalisation means they are not really able to provide media criticism with an effective and sustainable public platform.
- *Media criticism requires structure:* Studies performed by the Institute of Applied Media Studies at Zurich University of Applied Sciences (ZHAW) in Winterthur show there is a correlation between reporting involving media criticism and the level of structure concerned. The presence of responsibilities or section-specific structures promotes a sustainable and comprehensive brand of journalistic media criticism. It is also clear that reporting involving media criticism – with the exception of Swiss radio and television – only tends to cover media organisations with some reluctance. In addition, reporting involving media criticism is not very open to criticism from third parties and prefers to focus on the end product of journalism rather than structural issues like the production conditions associated with journalism. Another aspect is a reluctance to criticise one's own media firm and the fact that criticism only features on the agenda fairly sporadically and in the wake of particular events like the Hildebrand affair.
- *Role of communication and media studies:* Initial findings regarding the structural weakness of media journalism, evidence that it suffers from certain blind spots, and the observation that neither media blogs nor actors from outside of the media are able to provide systematic and comprehensible media criticism based on specific criteria all underline the important contribution to be made to media criticism by the field of communication and media studies, an indispensable actor in this area. Communication and media studies can take a disinterested approach to media criticism. This field must ensure, however, that it interacts and collaborates both with other actors within society and media practitioners. It is also ultimately reliant on the journalistic media providing the public with coverage of these issues, the very same actors whom it is observing, analysing and assessing.

Structure of and innovations in the Yearbook 2012

The Yearbook 2012 will describe the current media structures and the quality of the information supply that is provided and of the reporting in the Swiss media arena. All forms of information media have been analysed, i.e. the press, radio, TV and online news sites. Within these forms, different media types are examined, i.e. for newspapers, the subscription, tabloid, free and Sunday papers are included, and also magazines; for radio and television, both public and private broadcasting are included, while the online news sites of the subscription, tabloid and free newspapers are covered, as well as the online portals of the audio-visual media and telecommunications companies. The analysis is on three levels:

1. At the level of the *media structures* in Switzerland, we are interested in the process of concentration, the media companies and their revenue, and the extent to which the public switches between media forms and media types, the diversity of media, and the stratification and segmentation of media consumers. At this level, all the information media in Switzerland are included which could potentially reach at least 0.5% of the population over the age of 15 living in the various linguistic regions. This year, that

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amounts to 144 media outlets across all forms. In assessing the situation we collected and used as much publicly available and relevant data as possible, including that which has to be paid for, about the ownership and revenue of the media companies (fees, advertising, sponsorship, subscriptions, sales), along with the circulation, coverage and use of the media outlets.

2. At the level of *quality validation*, we are interested in the information supply, the issue agendas and the front page reporting in the press and online as well as the lead stories in broadcasting (radio and TV). Across the various different forms, the front page and lead story reporting is validated using the journalistic quality criteria of diversity, relevance, topicality and professionalism. This analysis of front page and lead stories is also used to determine the varying news agendas for different audience groups based on their media consumption. This intensive content analysis was carried out on the 46 main information media, from all linguistic regions and of all forms and types, out of the 144 media outlets in the basic sample used to evaluate the media structures.
3. At the level of *in-depth studies*, it was, among other things, a question of carrying out investigations which shed light on changes at the interface of politics, the media and the economy, over as long a period as possible (mediatisation research).

Innovations in this year's Yearbook

– *Analysis of information outlets – innovations in terms of the research concept:* This time the analysis of information outlets validates the entire breadth of the information supply, rather than just the standard sections. For radio and television forms, data from programme research undertaken by several research teams on behalf of the Federal Office of Communications (OFCOM) were used for the first time for the analysis of information outlets. This approach was modified to ensure a direct link to the programme research and to widen the basis for the research.
– *Front page and lead story analysis – innovations in terms of the research approach:* The available data, which covered two years, provided the material for sample-based tests for each media outlet, which in turn made it possible to define valid samples for each individual media outlet. As such, the quality analysis for front page and lead stories is based on a random sample across the year under investigation as opposed to the previous exhaustive survey.
– *Front page and lead story analysis – updating of the "temporality" variable:* In empirical terms, the attempt to establish a dichotomy within the "temporality" variable between the thematic and episodic proved to be unsatisfactory. Empirical experience showed that a more sophisticated codification of the kind of reporting that attempts to provide some context, as measured by the temporality variable, is desirable. This has seen the variable develop to incorporate four rather than two elements. As a result, it is now possible to make a distinction between news stories with an explanatory function (thematic-explanatory), a problematisation function (thematic-problematising), a chronicle-type function (episodic-chronological) and those which focus on events (episodic-selective).
– *Front page and lead story analysis – sample (re-)codification for the years 2010 and 2011:* Not only the year 2011 but also 2010 was re-codified on the basis of the revised sample codification and the updating of the "temporality" variable. This ensures a diachronic comparison with investigation years 2010 and 2011 remains possible. It does, however, mean that a direct comparison cannot be made with the results published in one of the first two editions of the Yearbook.
– *Evaluation process – quality scoring:* A new evaluation process known as quality scoring has been applied to the new two-dimensional representation of the differences in quality between the media outlets, types and forms using the indicators of diversity, relevance, topicality and professionalism. This provides a basis for comparing media outlets or their types and forms, with the point of origin – from which the individual outlets, types or forms can deviate either positively or negatively in two dimensions – being the mean value against which the object of investigation in each case is measured. This quality scoring process is in keeping with the general approach to quality validation in this Yearbook, since quality standards and evaluations are not absolute categories; they are more like conditions which apply to a greater or lesser degree.

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Schweiz – Suisse – Svizzera

Herausgegeben vom fög – Forschungsbereich Öffentlichkeit und Gesellschaft/Universität Zürich im Auftrag der Stiftung Öffentlichkeit und Gesellschaft, Zürich

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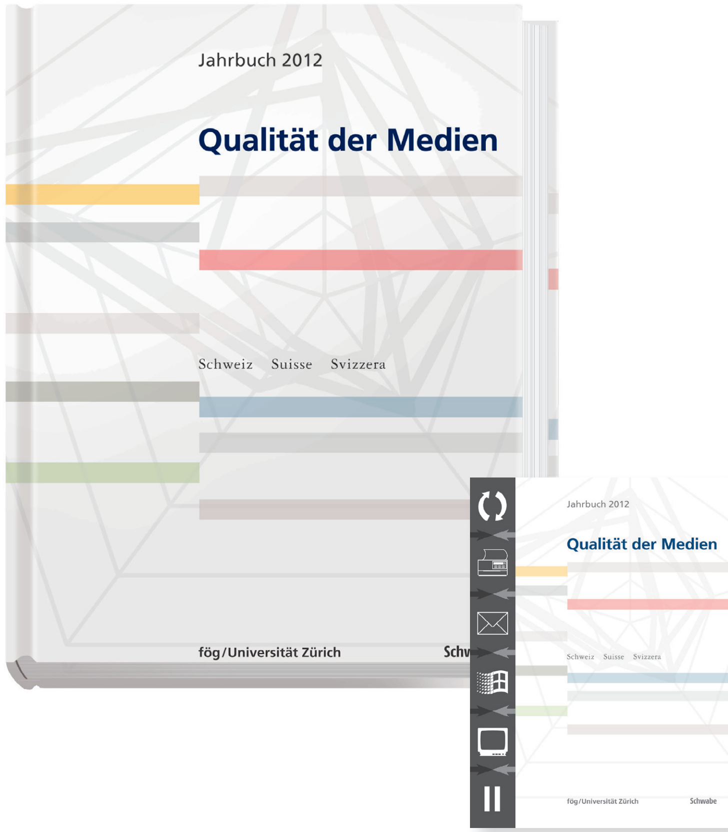

Das dritte Jahrbuch zur Qualität der Medien in der Schweiz

Dass die schweizerische Medienlandschaft durch einschneidende Umwandlungsprozesse geprägt ist, war bereits ein Befund der beiden ersten Ausgaben des Jahrbuchs *Qualität der Medien – Schweiz Suisse Svizzera*. Die drei Gattungen Presse, Radio und Fernsehen sehen sich einem Nutzungsschwund ausgesetzt. Der Kampf um die Aufmerksamkeit von Lesern, Hörern und Zuschauern spitzt sich weiter zu und hinterlässt Spuren hinsichtlich der Qualität des Informationsangebotes wie auch der Berichterstattung. Das *Jahrbuch 2012* ergänzt und erweitert die Beobachtung dieser Umwälzungen.

Das dritte Jahrbuch zeichnet sich durch eine Reihe von Innovationen aus: Ein neu entwickeltes Qualitätsscoring erlaubt es, die publizistische Qualität der einzelnen Presse-, Radio-, TV- und Onlinetitel im Quervergleich präzise zu beurteilen. Anhand von Nutzeragenden wird gezeigt, mit welchen Inhalten spezifische Nutzergruppen wie etwa die Vielleser von Gratiszeitungen konfrontiert und versorgt werden.

Im Rahmen von Vertiefungsstudien werden unter anderem folgende Themen detailliert untersucht:

Die Berichterstattung über die Eidgenössischen Wahlen 2011: Die Qualität der Wahlberichterstattung wird einer vertieften Betrachtung unterzogen. Im Mittelpunkt steht dabei die Frage, ob gewissen Wahlkampfthemen und -akteuren mehr Aufmerksamkeit geschenkt wurde als anderen und warum.

Die Qualität der Berichterstattung auf Newssites: Hier interessiert zentral, in welchem Masse Newssites auf fremdproduzierte Inhalte zum Beispiel aus der gedruckten Ausgabe zurückgreifen.

Die Kriminalitätsberichterstattung: Eine Analyse macht politische wie mediale Hypeeffekte dingfest und zeigt, dass politische Kampagnen die Kriminalitätsberichterstattung verstärken und dass einzelne Delikttypen wie schwere Gewaltverbrechen gegenüber der Kriminalstatistik deutlich überrepräsentiert sind.

Das Jahrbuch *Qualität der Medien – Schweiz Suisse Svizzera* wird erarbeitet durch den *fög – Forschungsbereich Öffentlichkeit und Gesellschaft der Universität Zürich* (www.foeg.uzh.ch). Es wird gefördert durch die Stiftung Öffentlichkeit und Gesellschaft (www.oeffentlichkeit.ch). Sein Ziel ist es, das Qualitätsbewusstsein für die Medien in der Schweiz zu stärken. Das Jahrbuch bietet eine grundlegende Informationsquelle für Medienschaffende, Führungskräfte aus Politik und Wirtschaft, die Wissenschaft und alle Interessierten, die sich mit der Entwicklung der Medien und ihren Inhalten auseinandersetzen wollen. ■

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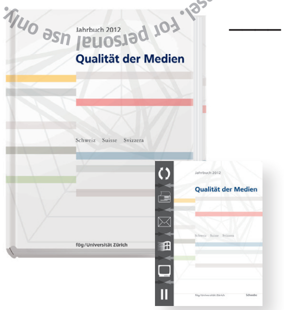

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