Year: 2017

main findings

Eisenegger, Mark

Other titles: The Quality of the Media Suisse Svizzera

Yearbook 2017

The Quality of the Media

Digest: main findings

Schweiz Suisse Svizzera

fög / Universität Zürich

Schwabe

The *Jahrbuch Qualität der Medien* ("Yearbook The Quality of the Media") and the accompanying e-journals *Studien* and *Reflexionen* are published in German by Schwabe Publishers Basel. The Yearbook and the e-journals can be ordered on www.schwabeverlag.ch, the Yearbook is also available in any bookshop.

Excerpts from the Yearbook and the e-journals are accessible on www.foeg.uzh.ch.

Translation: Syntax Übersetzungen Ltd., Zurich, www.syntax.ch
Production: Schwabe AG, Printing House, Muttenz/Basel, Switzerland
ISBN Digest: main findings 978-3-7965-3791-2

rights@schwabe.ch
www.foeg.uzh.ch
www.schwabeverlag.ch

Digest: main findings 2017
The Quality of the Media – Switzerland

The Swiss media system and the quality of the media are the subjects of our ongoing research. We publish our results in autumn each year – via the website www.foeg.uzh.ch – as the "Yearbook The Quality of the Media" *(Jahrbuch Qualität der Medien)* and periodically throughout the year as "Quality of the Media Studies" *(Studien Qualität der Medien)*. Additional research reports are also published via this site. The Yearbook analyses and documents on an annual basis the main events and developments within the Swiss media system. It also contains detailed analyses of the use and funding of the general interest information media with the greatest reach from the three major linguistic regions in Switzerland, as well as analyses of the quality of their news coverage. In addition, this Yearbook contains an in-depth discussion of digital-driven structural change within the public sphere and its consequences for professional information-based journalism.

Our analyses focus on information media from the traditional forms of press, radio and television as well as the new online information offerings on news sites, online platforms and social media. The present brochure documents the main findings from the 2017 Yearbook. These show that digital-driven structural change within the public sphere is continuing apace. The Internet and particularly platforms run by global tech intermediaries have developed into a kind of central authority within the public sphere. And this is producing certain changes in the form and structure of the public sphere. If we look at media providers, with their offerings, and the kind of reach such offerings achieve, the public sphere starts to look like a "long tail" when represented graphically (see diagram 1). At the "front of the tail" are just a handful of providers with significant reach, which in Switzerland (still) include professional media operators. At the "back of the tail" is a multitude of providers and offerings which reach significantly fewer people, including new professional offerings, professional PR services with direct online access to the public via "corporate publishing", and also controversial so-called "alternative" information offerings. All the providers at the "front" and "back" of the tail are finding themselves dragged along by global tech intermediaries and platforms. Some appear to be profiting from these for the moment, but most media providers are finding their relationship with tech intermediaries and platforms to be highly problematic and, above all, unpredictable. This "platformisation", which is mainly being driven by *Google* and *Facebook*, is putting pressure on professional journalism in Switzerland.

Against this backdrop we are focusing this year on the following six main findings:

I. *Professional information media now more important than ever:* Digital-driven structural change is promoting the emergence of a "long tail" public sphere within the online realm in Switzerland. This is associated with an ongoing increase in concentration among professional information providers that achieve extensive reach. At the same time, there is a growing "long tail" of providers which only achieve limited reach and do not abide by the traditional standards associated with professional information-based journalism. And this is why professional information media are becoming more important than ever before, since they have an essential duty to assume a kind of curator or gatekeeper role within the free and chaotic world of digital networks.

II. *"Digital first" the order of the day in Switzerland too:* Digital-driven structural change is also being reflected in the way that media consumption in Switzerland is increasingly migrating towards digital channels. And in Switzerland too, some 41% of the population are already obtaining most of their information via news sites or social media. There may indeed be some good news for Swiss media providers inasmuch as online use in Switzerland, in international terms, tends to involve more direct access to news sites and therefore media brands themselves – as opposed to via search engines or social media. But in Switzerland too, global tech intermediaries are enjoying increasing prominence as feed channels for news and already represent the main access portal to news for the youngest age group. This unbundling of media consumption is weakening the media brands of domestic professional information providers. And then there is the financial dominance enjoyed by global tech intermediaries, which is also putting information media under economic pressure.

III. *Chaotic growth within the digital network:* The structural crisis within professional journalism is favouring the emergence – at the "back of the tail" – of alternative media. The subject of much controversy, these stand in direct opposition to the established information media and are sometimes associated with the dissemination of conspiracy theories. These currently only exist on the fringes in Switzerland, with the low degree of polarisation and the considerable trust enjoyed by professional media still limiting the spread of alternative media within the country for the moment. But alternative media can nevertheless achieve extensive reach with individual stories, depending on the situation, as a result of networking.

IV. *Quality of news sites on the rise:* Many professional information providers at the "front of the tail" continue to produce journalism of measurably high quality across several channels, with some providers even improving quality levels over the past three years. In particular, the quality of professional online news sites, which had long been worse than their press or broadcast counterparts, has increased markedly. And while it is still the case overall that low-quality offerings achieve the greatest reach in the Swiss media scene, it is also proving possible to reach a mass audience or readership with good quality media. Apart from information programmes from public service broadcasters, other examples of media which combine high quality with reach include the Sunday outlets *Il Caffè*, *Le Matin Dimanche* and *NZZ am Sonntag* or the subscription outlets *Corriere del Ticino*, *24 heures* and *Tages-Anzeiger*.

V. *Facebook dragging down the quality of information providers:* Social media, in terms of the basic way they work, are seen as emotive media and can cause quality levels to flatten off among professional information media if these become overly influenced by this way of doing things. For example, our recent analysis of what is offered on *Facebook* shows that many of the information media investigated on *Facebook* – which is becoming an increasingly important platform for news – offer lower quality than on their own channels. However, providers of subscription papers are resisting this trend. And some individual media providers are proving that they can even trigger a response among social media users with high-quality stories. This is true of quality media which also offer quality stories on social media – in keeping with their "profile" – and generate a response from the public with these.

VI. *A concentrated media market:* At the "front of the tail", the already considerable level of media concentration in Switzerland has become even more acute, with the diversity of providers declining. In German-speaking Switzerland, the three biggest Swiss media firms claimed 71% of the online market reached by professional information media in 2016. In each of French- and Italian-speaking Switzerland, meanwhile, the figure is as high as 88%. Meanwhile, the diversity of media providers is severely restricted. And then there are the recent developments at *Tamedia AG*, a major player in the Swiss press and online information market. The announcement of plans to step up the integration of various outlets into centralised editorial departments over the next few years will mean a further reduction in the diversity of media content, including the reporting of both national and international hard news. More media firms are also expected to follow suit. One likely contender is *NZZ-Mediengruppe*, which has announced plans to discontinue the printed version of its *Ostschweiz am Sonntag* outlet.

Our empirical data from surveys and from our own content analyses, along with the characteristics of the media sector, show that the Swiss media system is exposed to developments taking place at a global level and becoming increasingly influenced by global tech intermediaries. And because this process is diminishing the fabric of the Swiss media system, it is imperative to come up with measures designed to strengthen Swiss information media that actually focus on these international trends (please see the preface to the current Yearbook for a more in-depth view).

This brochure goes on to provide an outline of the six main findings. A more context-based description of "digital-driven structural change" can be found in a separate study and in the preface to the "Yearbook The Quality of the Media", which was written this year by Mark Eisenegger. Detailed explanations of the data gathered – as well as the findings from the integrated secondary data and the sources for the literature featured – can be found in the five sections of the Yearbook.

I. Professional information media now more important than ever

Digital-driven structural change is causing fundamental changes to the structure of the public sphere and society (please see the preface and the separate study on digital-driven structural change within the public sphere for a more in-depth treatment of this issue). It is favouring the development of a "long tail" public sphere within the online realm. And although the back of this "long tail" is characterised by the continuous emergence of new players – in the form of a now countless multitude of media and information providers with medium to low reach – the majority of these hardly, if at all, abide by journalistic quality standards and pursue specific interests instead (see diagram 1). And when the public sphere is associated with this type of structure, with the "long tail" seeing an increase in the amount of "junk information" and the tendency for information policy to be driven by specific interests, professional information media assume even greater importance. As "gatekeepers" they have a duty to perform a kind of monitoring and validation role in respect of public communication within the free and chaotic world of digital networks. The dire truth, however, is that professional information media are becoming increasingly less able to perform this quality assurance function, because the resources available within the field of professional information-based journalism are continuing to decline.

At its front end – populated by information offerings with significant reach – the "long tail" public sphere is seeing players disappear from the scene (see diagram 1).

The repression of professional information media has various causes, some as a result of external influences and some of their own making. One external factor is "platformisation" (i.e. the growing prominence of global tech intermediaries), which is driving a reduction in the number of players and again encompasses both economic and social considerations. In economic terms, the lion's share of advertising revenue goes to *Facebook*, *Google* and the like, which are far more advanced than national providers when it comes to "data-driven advertising". Because users of online news are very reluctant to pay for content, traditional information providers are seeing their financial foundations eroded from two different sides. And in social terms, users are increasingly experiencing "media" as mere ephemeral impressions, something glimpsed via the fast-moving collections of stories compiled on the platforms of tech intermediaries. This is diminishing the brand power of traditional information media as destinations visited directly.

But the growing reluctance of various private media firms to invest in professional information-based journalism – a situation of their own making – is another reason why players are leaving the scene and thereby undermining this indispensable pillar within the basic infrastructure of any democracy. Non-journalistic business lines such as online marketplaces or online classifieds are a growing phenomenon, but various media companies dismiss the idea of using these lucrative lines to cross-subsidise information-based journalism. As at other companies, reputation also gives a demonstrable boost to a firm's financial figures. At the same time, information-based journalism is and will remain the most important positive reputation driver for private media firms like *Tamedia AG*, *Ringier AG*, *NZZ-Gruppe*, *AZ Medien AG* and *Somedia AG*. Only information-based journalism earns the media firms a reputation as an organisation offering products of systemic relevance. Information-based journalism is also therefore the sector which can count on far more public support over the long term than the non-journalistic lines various private media firms have been pushing in recent years. This is certainly worth noting, especially since both e-commerce and the classified ads business have also come under pressure lately from

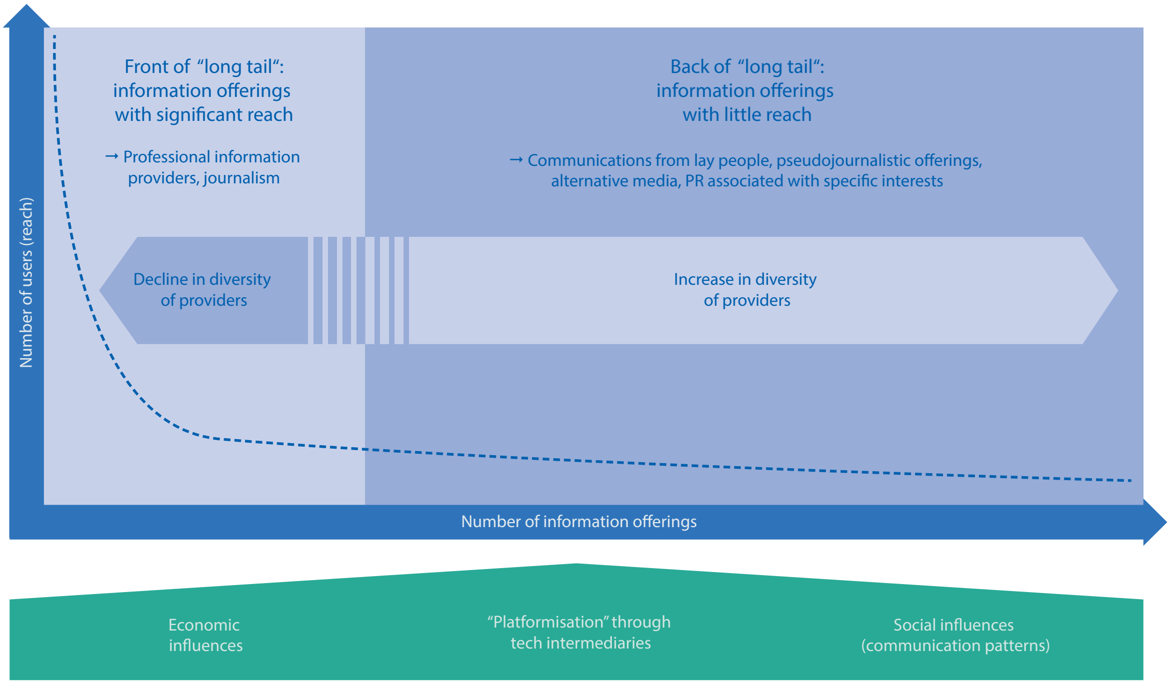


Diagram 1: "Long tail" public sphere in the digital age

The "long tail" public sphere within the online realm is defined along the horizontal axis by the quantity of media and information providers and along the vertical axis by the reach achieved by these providers. While an increasing level of media concentration can be observed at the front of the "long tail", the back is seeing a growth in the diversity of pseudojournalistic offerings. It is a case of the "long tail" public sphere feeling the growing influence, in both economic and social terms, of the platforms owned by global tech intermediaries (*Facebook*, *Google*, etc.). In economic terms, there is an increasing flow of advertising money to global tech intermediaries. And in social terms, the tech platforms are promoting an unbundling of media consumption, which is no longer centred around the brands of professional information providers. Both these phenomena are tending to undermine professional information-based journalism.

tech intermediaries (for example, with the recently announced launch of *Facebook* "Marketplace" in Switzerland).

The Swiss media system therefore is finding itself exposed to a process of globalisation and being increasingly influenced by global tech intermediaries. And Swiss media firms have long been aware of this too, with all the various media strategies of the major Swiss media organisations paying significant attention to tech intermediaries. The strategies pursued are based on defence *(Admeira)*, finding niches, diversification (online marketplaces, online classifieds) or cooperation *(Facebook Instant Articles; Google "Digital News Initiative")*.

And because this process is continuously diminishing the fabric of the Swiss media system, any measures to strengthen Swiss information media will need to focus prominently on these international trends and boost the national media system's ability to rehabilitate itself in this kind of environment. The system of professional information providers represents an indispensable element of the basic infrastructure in place for the wider community, democracy and the national economy. And with this system coming under pressure from the process of digital-driven structural change, it must be supported accordingly.

This is why Switzerland should be open to more expansive approaches to media promotion – ones that transcend individual media forms and may not involve the state. Because global tech intermediaries profit substantially from journalistic content, which they monetise on the advertising market without allowing national media providers an adequate share of the revenue generated, it is worth considering an advertising

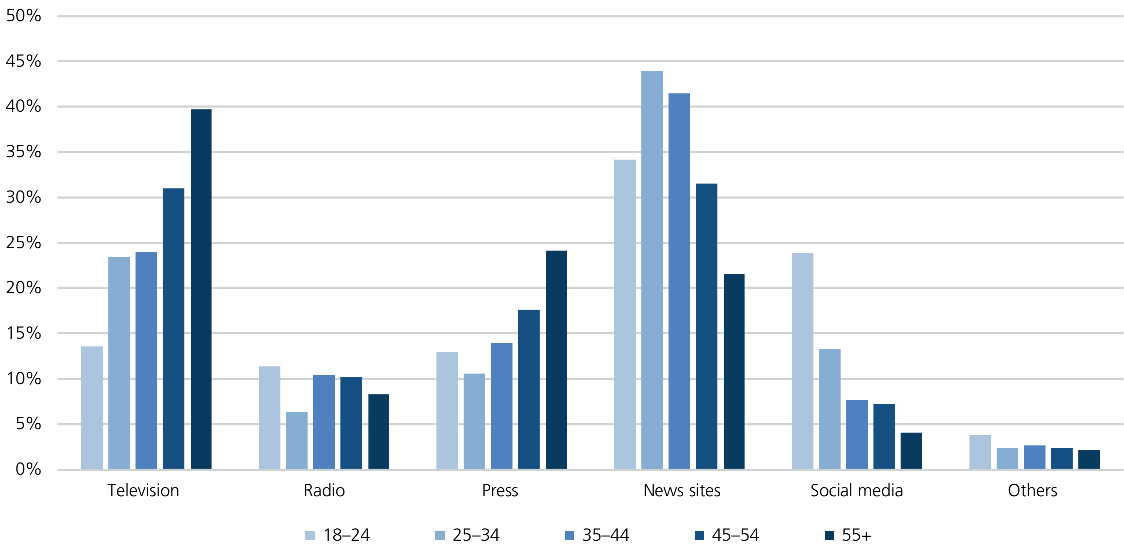


Diagram 2: Use by age group
The diagram shows which channels represent the main sources of information, in terms of news use ("Main Source of News"), for the individual age groups in Switzerland (source: Reuters Digital News Report, 2017).
Interpretation example: 24% of those surveyed aged 18 to 24 state that they use social media as their main source of news.

tax for global tech intermediaries. Private media firms need to convince themselves that using non-journalistic lines to cross-subsidise information-based journalism helps bolster their reputation and therefore makes good business sense too. Instead of fighting each other, it is a good idea for privately funded media firms and the license-fee-funded *SRG SSR* to also seek collaboration in any areas which will not have a negative impact on the diversity of journalistic content. This applies first and foremost to technological developments, people's training and continuing education, and research. It is also a case of ensuring that professional information-based journalism regains the status it deserves and which marks it out from the more dubious material to be found online. And this is why our society needs to invest much more heavily in the area of media literacy. The younger generations in particular must be made much more aware of the importance of professional information media, as well as the digital-driven structural change taking place within the public sphere and its consequences for society. And last but not least, the idea of creating a (part) publicly funded digital infrastructure for journalistic information providers must be supported. This would also make it possible for smaller professional information providers with a commitment to quality to establish themselves in the online world.

II. "Digital first" the order of the day in Switzerland too

In the wake of digital-driven structural change within the public sphere, not only are media offerings continuing to migrate online at full pelt, but digital channels are also becoming ever more important in terms of news consumption. At least these are the findings of the "Digital News Report" from the Reuters Institute for the Study of Journalism, in which the fög has been involved as the Swiss partner since 2016 (and in connection with which it has produced its own country report for 2017). In Switzerland, some 40% of media users are already using news sites (32%) or social media (9%) as their main source of information. This means that digital channels have already overtaken television (30%) as the main source of news. The printed press (18%) and information programmes on the radio (9%) are the main sources for

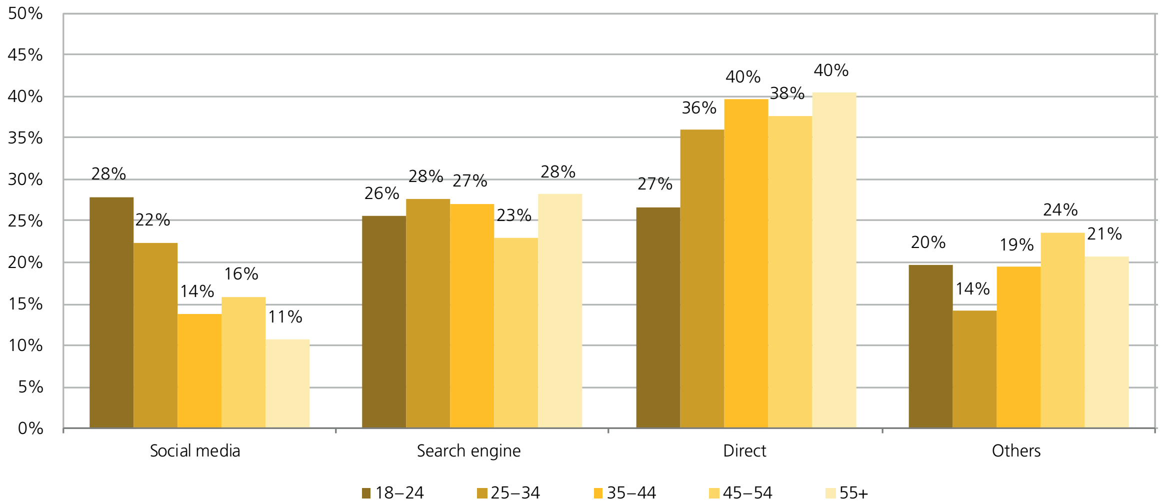


Diagram 3: Switzerland – main feed source for the use of information offerings
The diagram shows how the individual age groups in Switzerland access news offerings (source: Reuters Digital News Report, 2017).
Interpretation example: 28% of those aged 18 to 24 state that their main access to information offerings is via social media. And only 27% of this same age cohort state that they access news offerings by visiting a news site directly.

far fewer Swiss ("others": 3%), even though the press in Switzerland (18%), just like in Austria (22%), still plays a somewhat bigger role than in many other countries in Europe (generally less than 10%).

Looking ahead to the future, the behaviour of younger media users is especially important, and this age group is illustrating most clearly the effects of digital-driven structural change for Switzerland (see diagram 2). The younger the user, the more they tend to obtain their information via digital channels and particularly the platforms of global tech intermediaries, while users tend to rely more on TV and the press the older they get. For those aged 18 to 24, social media (24%) have already emerged as the second main source of news behind news sites (34%). As such, social media are no longer mere channels for managing private contacts, but are being increasingly used to access news. Television by contrast, which is the main form among older age groups, only remains the main news source for 14% of the youngest user group in Switzerland. Only users aged over 55 count it as their main information medium. And news sites (32%) have even become more important than television (31%) for users aged 45 to 55, albeit by a small margin. Press use is also highly age-dependent. The lowest rate of 11% applies to those aged 24 to 34, and the highest of 24% to those over 55.

When the Swiss consume news online, they are more likely than people in other countries to access the offerings of media brands directly via, say, apps or by accessing the websites themselves. The proportion of those who mainly use "news sites" is higher in Switzerland (32%) than the average across the 36 countries studied in the "Reuters Digital News Report" (28%). At the same time, social media are not (yet) the main source of news for as many people in Switzerland (9%) as in other countries (average: 15%). And this is the good news for media providers in Switzerland: they still seem better at retaining the public's loyalty than providers in other countries.

It can also be seen, however, that media are increasingly being consumed on the platforms of tech intermediaries, i.e. as fast-moving "story clusters" from a wide variety of sources in users' personalised hit/recommend lists and news feeds. Having said this, loyalty towards established "news brands" remains relatively high in Switzerland for the moment. But the dominant pattern for almost a third of all users already is the emerging form of media consumption whereby the users concerned no longer show specific media brands any particular favouritism.

This user group accesses news by using search engines to seek out specific content (10%) as opposed to media providers (18%), as well as stumbling across news on social media (14%) or being fed news by news aggregators (3%). It must be assumed that this user group will continue to grow in Switzerland too in future in keeping with the international trend. In the young adult group, it is even becoming apparent that social media are already the main feed sources (28%) as opposed to direct access to any given website (27%) (see diagram 3).

This in turn is undermining brand loyalty towards professional information providers. We know from a study conducted by colleagues in Oxford that less than half of media users are able to remember the media brand concerned *(brand recognition)* if they accessed the news story in question via a search engine (37% can remember the brand) or social media (47%). By contrast, around two-thirds of users were able to remember the feed channels or platforms of tech intermediaries such as *Facebook* through which they consumed the news. This way, users increasingly associate news with the intermediaries' distribution channels and not those producing the content. A typical tech platform user might say: "I read it on *Facebook*." As opposed to: "I read the *Tages-Anzeiger* story on *Facebook*."

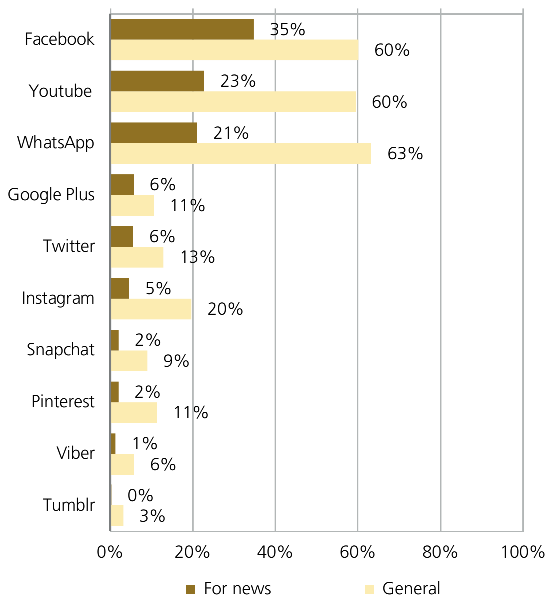


Diagram 4: Switzerland – use of social media platforms

The diagram shows how many of those surveyed use the respective social media platforms (in general) in Switzerland and whether they use these for news purposes. The actual question was whether these sources were used during the "previous week" (source: Reuters Digital News Report, 2017).

Interpretation example: 60% of those surveyed state that they use *Facebook*. 35% of these use *Facebook* for news purposes.

The rise of social media is being accompanied by the growing dominance of three social networks, which are owned in turn by just two major tech intermediaries, namely *Facebook* and *Google*. Leading the field, *Facebook* (35%) and *WhatsApp* (21%), which also belongs to *Facebook*, as well as *Youtube* (23%), which belongs to *Google*, are the main social media platforms for news in Switzerland (see diagram 4). All other platforms are used by much less than 10% of the population per week for news purposes. Given the dominance of the major tech intermediaries *Facebook* and *Google*, there is a growing temptation for traditional media providers to have a presence on the platforms of tech intermediaries. Conversely, however, this makes it more difficult to increase user loyalty to their own medium and steer users towards their own channels – where there is still some potential to generate advertising revenue and sell subscriptions or at least individual stories.

Overall, Swiss media providers are becoming increasingly dependent on global tech intermediaries. And (Swiss) media providers are finding it harder to fund their content, with competition from tech intermediaries preventing them securing any substantial revenue from the advertising market. *Facebook* and *Google* dominate the global online advertising market, and a not inconsiderable factor in the high rates of growth they enjoy is the high-quality journalism from traditional information providers they offer on their platforms without allowing these an adequate share in the advertising revenue. Indeed, the numbers in purely financial terms are striking, with 75% of every new Swiss franc earned through advertising ending up with global tech intermediaries. Between 2015 and 2016 alone, *Facebook* (+62%) and *Google* (+20%) enjoyed a double-digit increase in advertising revenue, while the rate of growth dipped significantly for other providers including professional information providers.

In addition, the public is not very willing to pay for online information offerings. Both young and old now take it for granted that they can obtain news from the Internet for free. Only 11% of Swiss media users paid for online news last year. In-depth analyses also reveal that willingness to pay is associated with trust in the media. And this is borne out by the fact that media users who mainly consume their news via social media have less trust in the media and are less willing to pay for journalism. The trend towards "platformisation", i.e. the rise of platforms belonging to tech intermediaries, is therefore becoming a major problem for professional media providers from both a sociopolitical and economic perspective.

III. Chaotic growth within the digital network

With the "long tail" public sphere, digital-driven structural change is causing the public sphere to develop a new structure and form (see diagram 1). It is lowering the barriers to entry for new information offerings, with the number of media and information providers increasing in turn. However, the reach and prospects of these various media providers differ markedly. In media terms, the public sphere starts to look like a "long tail" when represented graphically. Some (just a few) news sites are dominant, and in Switzerland these news sites with significant reach are mainly associated with offerings from established media firms.

In response to the structural crisis besetting journalism, however, the "back of the tail" is seeing the emergence of new information offerings outside the structures associated with established media firms. The back is home, for example, to new professional offerings with little reach and also alternative media. The "back of the tail" is also seeing the rise of economic, political and other organisations which are keen to promote their own particular interests and no longer necessarily have to go through the usual editorial channels associated with journalism. Instead, these organisations can enjoy direct access to the public through, say, "corporate publishing" or "content marketing".

The emergence of these new offerings is also partly a response to two developments which are starting to crystallise in the wake of digital-driven structural change. Firstly, new professional journalistic offerings represent a response to unease with the growing commercialisation of traditional media providers. And secondly, alternative media represent a response to unease with so-called "mainstream" media.

New professional offerings are generally launched by journalists. They see themselves as part of the journalism system and as an addition to existing offerings. They generally mark themselves out from established media through their journalistic philosophy. They complain about the decline in diversity among the media, wish to strengthen the role of journalism within society, or are critical that the big media firms are overly concerned with financial considerations. A prominent example is *Project R* or *Die Republik*, which attracted a lot of attention upon its launch in 2017. This was founded along the lines of the successful Dutch start-up *De Korrespondent* and managed to generate the starting capital required in record time through crowd funding. In French-speaking Switzerland, 2017 saw the founding of the online offering *Bon pour la tête* in response to the closure of the magazine *L'Hebdo*.

It is important to make a distinction between these and the new and controversial alternative media, which tend to be typified by three core characteristics. The first is the criticism they face from leading professional media. The second is the way alternative media position themselves in direct opposition to the social elite and established information media. They tend to set themselves up against a supposed "mainstream" in the media scene, but also in academia or politics. And the third is the way they turn to conspiracy theories to underpin their criticism of the "mainstream" or elites. These kinds of alternative media are thereby attempting to profit from the structural crisis affecting traditional journalism and bypass traditional media providers and their gatekeeper function.

For this Yearbook, the analysis focused on six new professional providers founded in recent years and six of the most widely discussed "alternative media" in German-speaking Switzerland. The reach of such offerings was studied based on monthly visitor numbers to websites and fans on *Facebook* (see diagram 5) as well as the videos from these providers called up on *Youtube* (not shown). The empirical evidence shows that both new professional providers and the new controversial "alternative media" are lagging way behind in terms of reach in the part of the tail where reach is limited.

	News site	Monthly Unique Visits	Proportion of Swiss users based on monthly unique visits	Facebook pages: page likes
Established providers	watson.ch	881 982	65%	141 497
	bazonline.ch	328 154	65%	24 095
	aargauerzeitung.ch	316 626	86%	17 254
	suedostschweiz.ch	82 313	87%	10 421
New providers	tageswoche.ch	109 734	83%	12 751
	infosperber.ch	52 594	63%	4597
	zentralplus.ch	44 397	91%	6424
	tsri.ch	22 456	95%	20 697
	journal21.ch	16 077	48%	1812
	onlinereports.ch	14 446	95%	850
Alternative media	uncut-news.ch	93 301	18%	2908
	alles-schallundrauch.blogspot.ch	22 704	89%	12 277
	conviva-plus.ch	22 168	72%	42 208
	legitim.ch	19 311	14%	3474
	expresszeitung.com	15 564	13%	2475
	swisspropaganda.ch	11 612	40%	N/A

Diagram 5: Use of alternative media offerings

The diagram shows for the websites of individual media offerings the monthly unique visits and the proportion of visits from Switzerland for the first half of 2017 (data source: Similarweb). Also shown are the page likes on the offerings' *Facebook* pages (as of 28 July 2017).

Interpretation example: The website *expresszeitung.com* was called up by around 15,500 users a month, 13% of whom were from Switzerland. The *Facebook* page of *Expresszeitung* shows just short of 2,500 likes.

New professional providers, in the form of media start-ups that primarily use the online channel, still tend in Switzerland to be small businesses operating in regional and local niches and attracting relatively little use. The offerings with any kind of significant reach are the regionally based websites *tageswoche.ch* and *onlinereports.ch* (both in Basel), *zentralplus.ch* (Central Switzerland) and *tsri.ch* (Zurich) as well as the offerings *journal21.ch* and *infosperber.ch*, which mainly provide background reports on sociopolitical topics.

Also limited, compared with professional offerings from medium-sized media firms, is the reach of websites run by alternative media in Switzerland (see diagram 5). And although in some cases (e.g. *Uncut-News*) it may be similarly extensive as the reach of new professional information offerings such as *tageswoche.ch* and *zentralplus.ch* or news sites with a predominantly regional focus, a lot of traffic on alternative media sites comes from Germany and to some extent Austria. For example, only 18% of *Uncut-News* users come from Switzerland. Only *conviva-plus.ch*, apart from the Swiss edition of the blog *Alles Schall und Rauch*, has a mainly Swiss audience. Controversial alternative media are clearly trying to reach a wider audience and market by operating on a cross-border basis across Germany, Austria and Switzerland and therefore focus more on topics of international relevance than on topics specific to Switzerland. Also, the tendency for active users of these offerings to belong to closed and efficiently networked communities highlights the significant linkage between the sites. Although the individual sites can only boast relatively low levels of use overall, alternative media can sometimes generate significant reach with individual stories. Clearly, their strategy seems to be more one of circulating stories with potential for significant reach, as opposed to generating traffic on their own site. With this in mind, they mainly rely on *Facebook* (particularly *conviva-plus*) and *Youtube* (particularly *Uncut-News*) as platforms for dissemination.

Overall, however, the reach enjoyed by alternative media offerings in Switzerland remains limited. The limited significance of these niche providers is all the more remarkable because debate about the role of the media, and particularly criticism of the media, has

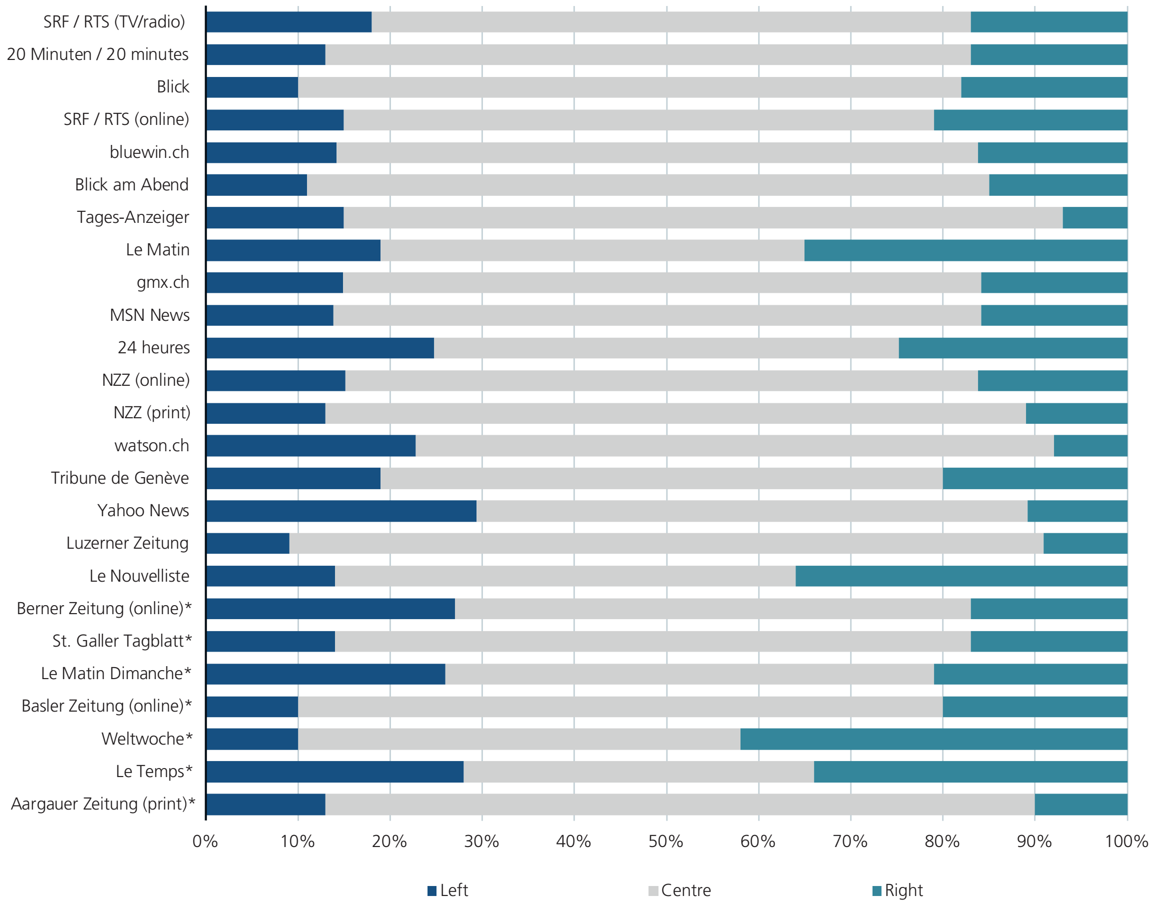


Diagram 6: Audience for media offerings (by political persuasion)

The diagram shows a breakdown of users of individual media offerings based on their professed political persuasion (source: Reuters Digital News Report, 2017). The offerings are listed in descending order according to use. * Based on 30 to 50 responses (all other outlets: >50 responses)

Interpretation example: 42% of *Weltwoche* readers claim to be on the right politically, while 10% claim to be more on the left. 48% feel they belong to the political centre ground.

intensified very sharply within public discourse in Switzerland over recent years. Terms such as “fake news” or “Lügenpresse” (lying press) are also gaining currency in public discourse in Switzerland. This has been shown by our analysis of the frequency of those terms in the Swiss public arena over time.

But how is it that alternative offerings in Switzerland currently remain at the “back of the tail”, while their counterparts in other countries like the USA (for example, *Breitbart*) are moving “to the front” and generating significant reach? The main reasons include the trust which the existing professional Swiss media still enjoy and the high levels of use that go with it – and this is true across the various political camps. Unlike in many countries, there is little in Switzerland of the kind of polarisation that might favour the emergence of “echo chambers” or the one-sided use of problematic alternative media. In political terms, those from the left, centre and right mainly tend to use the same media (see diagram 6). Other mitigating factors are the quality of the media, which remains relatively high in international terms, and the higher level of social control in a small, federalist country like Switzerland. Obvious items of “fake news” find it harder in Switzerland, compared with other countries, to take root and grow undiscovered in isolated filter bubbles. However, it can only be expected that alternative media will start to find conditions more conducive in Switzerland too

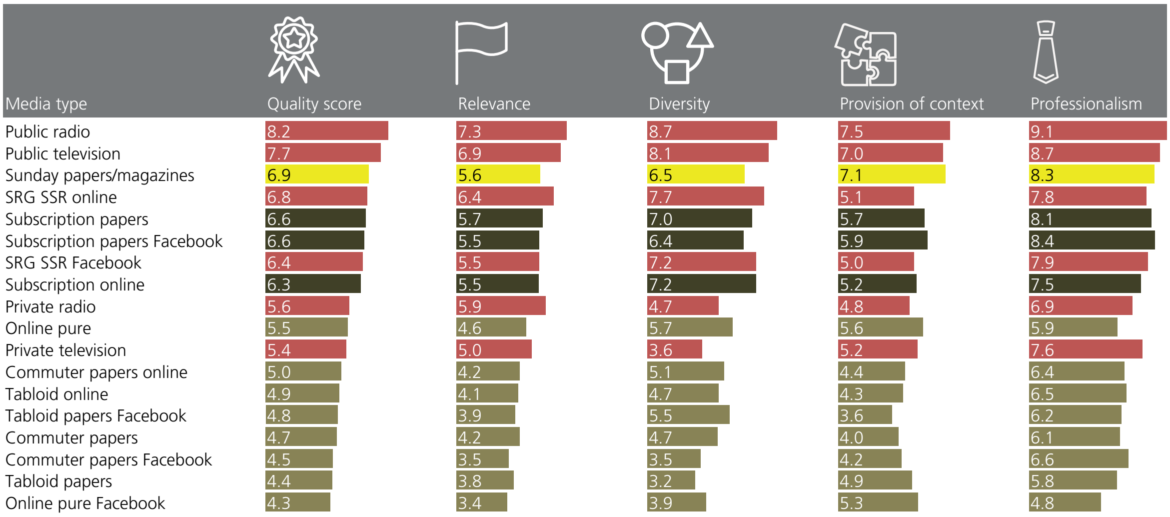


Diagram 7: Quality scores by media type

The diagram shows the quality scores for 18 media types. The colours of the bars relate to various media segments. The types are listed in descending order. Also shown for each type is how they scored in the four quality dimensions of relevance, diversity, provision of context and professionalism. The underlying data incorporates all stories considered in the quality analysis – based on a random sample (2016 n = 28,214).
Interpretation example: Public radio comes top of the quality rankings for the various media types with a score of 8.2.

as domestic professional information-based journalism loses its ability over the long term, due to dwindling resources, to perform its guardian-type function and social media become more important as platforms for using information.

Overall, however, Switzerland is significantly different from countries like the USA where media use is more polarised (see fög 2017). In Switzerland, professional media are still able to accommodate people with different political viewpoints; and for the moment at least, the "demand" for alternative media expected to represent positions beyond the "mainstream" – and preferably one's "own" political opinion only – appears to be limited in Switzerland.

IV. Quality of news sites on the rise

In the year currently under investigation, the quality of reporting among the 79 media outlets studied remains relatively high with an average score of 6.1 out of 10, despite the difficult prevailing conditions. Radio and television news from *SRG SSR* continue to top the quality rankings with scores of 8.2 and 7.7, respectively (see diagram 7). The public broadcaster tends to achieve higher quality scores with its traditional audiovisual news programmes than it does online. New in third place in the quality rankings is the "Sunday papers and magazines" type (6.9), which despite having a less relevant and diverse offering than the public broadcaster types is almost able to match the best in terms of provision of context and professionalism.

A key finding from the quality measurements is how the quality of online news sites has risen significantly. The only area where traditional news offerings still offer better quality than their digital counterparts is public broadcasting.

In this Yearbook, times series covering the last three years can be represented for multiple media types (see diagram 8). Across this period, the sample has remained fairly stable – based on 44, 46 and 47 outlets in 2014, 2015 and 2016, respectively – while trends in the media types' quality scores can be directly traced to how performance has changed across the four quality dimensions.

The quality offered by professional Swiss information media, both in the press and online, has remained high across the period studied and is tending, if anything, to improve rather than decline. This is all the more

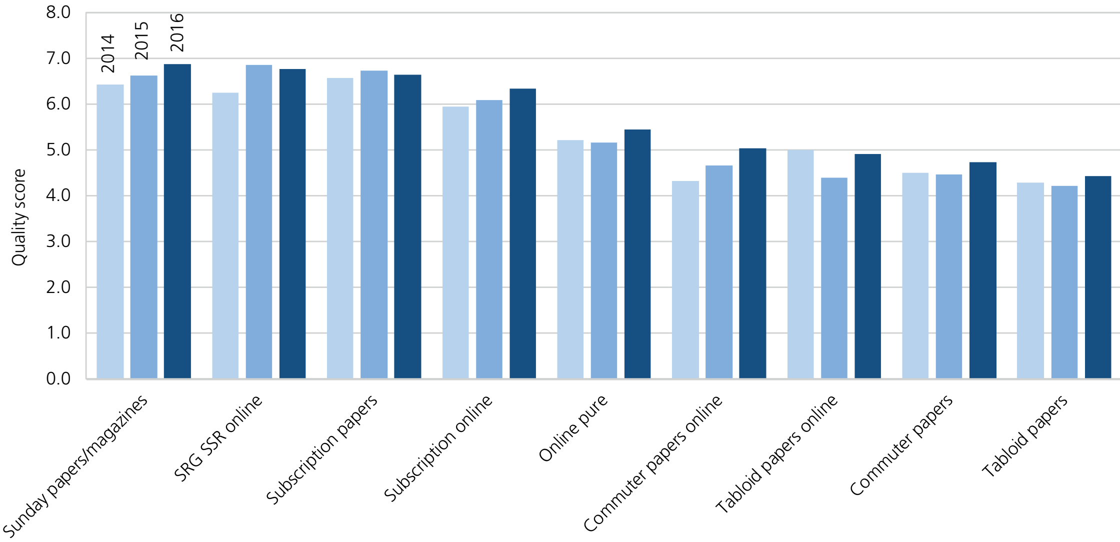


Diagram 8: Changes in quality between 2014 and 2016

The diagram shows how quality levels have changed for each media type between 2014 and 2016. The underlying data incorporates all stories considered in the quality analysis – based on a random sample for 2014, 2015 and 2016 (2014 n = 18,025; 2015 n = 19,249; 2016 n = 20,649).
Interpretation example: The quality score for the Sunday papers/magazines type has improved since 2014.

remarkable, given that the resources available in the Swiss information market are dwindling due to a loss of advertising revenue and cuts among editorial staff over recent years. It is possible therefore that an awareness of quality, as regards information-based journalism, is tending to increase among the media themselves.

The positive trend associated with many news sites is striking, with the quality of news sites belonging to the subscription press improving by 0.3 points over the period in question and the online offerings of commuter papers upping their quality by 0.7 points too. The *SRG SSR* online type along with the printed subscription papers and tabloid papers types have remained predominantly stable. The online pure and commuter papers types improved slightly during the most recent year to be measured, while tabloid news sites are fluctuating quite significantly.

If we take a broader view and look in general, across all the various forms and channels, at how far media providers can achieve reach on the back of quality, a more varied picture begins to emerge. Adopting an empirical approach, we have combined the reach figures with the quality scores for this purpose (see diagram 9). Because the reach figures for the various organisations associated with each media form are gathered in different ways, the result can only be considered a rough approximation. What emerges is that reach and market share can also be achieved with quality journalism. It would seem therefore that quality journalism has an audience (of its own) as well. But the overall picture nevertheless confirms the dominance of low-quality media in the Swiss media scene when it comes to achieving reach.

Diagram 9 shows the information market in Switzerland and the spread of the various media. For the sake of simplicity, this assessment divided the media outlets into two quality segments and two groups, namely media with quality above the average of all the media studied and media with quality below the average. And when this is combined with reach (again based on two groups), it is plain to see that offerings achieving below-average quality scores, based on all 79 media outlets studied, clearly enjoy the highest market share. These include 18 media outlets whose combined reach accounts for fully 45% of the information market. Having said this, there are almost as many media outlets (15) that also offer below-average quality, but hardly achieve any reach (6%). It seems therefore that

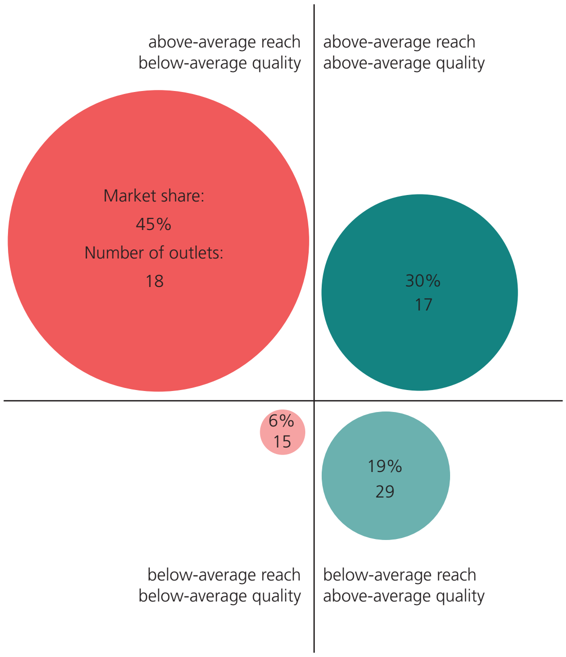


Diagram 9: Information market in Switzerland: quality and reach
The diagram shows the market share enjoyed by Swiss information offerings associated with below- or above-average quality. The underlying data incorporates all stories considered in the quality analysis – based on a random sample (2016 n = 28,214; 79 media outlets) (reach figures for the press: WEMF MACH Basic [average value from the 2016-2 and 2017-1 studies]; online: NET-Metrix-Profile 2017-1; *Facebook:* community size [as of 1 August 2017]; broadcasters: Mediapulse).
Interpretation example: The market share of information offerings with below-average quality scores but above-average reach is 45%.

the circulation enjoyed by an outlet is not just determined by its quality score. Because it is clear that there is certainly a market (30%) for high-quality news as well, even if only 17 of the 46 media outlets with above-average quality are particularly well used. Apart from information programmes from public service broadcasters, these include the Sunday outlets *Il Caffè*, *Le Matin Dimanche* and *NZZ am Sonntag* or the subscription outlets *Corriere del Ticino*, *24 heures* and *Tages-Anzeiger*. As many as 29 high-quality information media only achieve limited reach, however, and account for a mere 19% market share between them.

Sources and methods

The analyses underlying the Yearbook are based on both data gathered specifically for those purposes and also secondary data. The various sources are listed here, along with the various methodologies used:

Content analysis

The quality of reporting is measured using a content analysis conducted at the fög – Research Institute for the Public Sphere and Society / University of Zurich. A quality scoring system was implemented on the basis of this, with each story being coded by trained coders in accordance with scientific conventions (there is no automation of quality assessment). The random sample from 2016 takes 28,214 stories from 79 Swiss media into account. The data from 2014 and 2015 is also used for comparison purposes.

Public surveys

Again this year, the data from the "Reuters Digital News Report" was considered. This global report contains survey data for 36 countries (over 70,000 interviews), including for Switzerland. The fög – Research Institute for the Public Sphere and Society / the University of Zurich is the Swiss partner organisation for this major study conducted by the Reuters Institute for the Study of Journalism at the University of Oxford. Some 2,000 Internet users were surveyed from the German-speaking and French-speaking regions of Switzerland. Random samples representative of Internet users aged 18 and over were taken on the basis of online panels.

Characteristics of the media sector

The studies to ascertain the spread and concentration of information media and the media market are based on circulation figures or reach as measured by the media research organisations WEMF, NET-Metrix and Mediapulse. The data regarding funding of the media comes from the Stiftung Werbestatistik Schweiz and Media Focus. Secondary data regarding virality on the *Facebook* pages of media providers is provided by the open-source software Netvizz.

V. *Facebook* dragging down the quality of information providers

The improvements in quality made by news sites in particular are associated with a segment of the Swiss media scene which is experiencing an increase in use, so this marks a very important step in a positive direc-

tion (see point IV). But other developments are less positive, and this applies to the quality of social media offerings. For the first time, the *Facebook* pages of Swiss information providers with the greatest reach are also included in the analysis. The offering on *Facebook* differs from the offering on the corresponding news site in terms of both quantity and quality. On an average day, three times or so fewer stories are published on the *Facebook* pages analysed than on the providers' own websites. This means that media companies target and select stories from their overall offering to place on *Facebook*. They also supplement these stories with additional content such as *Youtube* videos or animated images (Graphics Interchange Format GIF).
The findings from our quality measurements make it clear that a media brand's quality level tends to be lower on *Facebook* compared with its traditional offering (e.g. printed newspaper) or its own online offering (e.g. news site) (see diagram 10). The newsfeeds on *Facebook* of most information providers studied are far more focused on soft news along the lines of infotainment. The aim is clearly to present users with easily accessible and engaging news and thereby increase the potential for clicks and shares, although there are big differences between media providers and media types. The general tendency is for the *Facebook* offering to be worse still for those media types in particular which already offer below-average quality on other channels (especially tabloid and commuter offerings). The offerings of subscription papers tend to be more immune to this quality-reducing trend associated with *Facebook*. Their quality scores, at 6.6 points on average for *Facebook*, even match the scores for their own printed papers and beat their own news sites by 0.3 points.
A comparison of individual outlets' news sites and *Facebook* offerings reveals that tabloid and commuter offerings have markedly lower-quality *Facebook* content compared with their news sites, but this is not the case with subscription papers or the *SRG SSR* portals (an average of –0.3 points). There are exceptions, however, such as the original news site of *Le Temps*, which counts among the best websites in Switzerland (7.3 points) and clearly outperforms its *Facebook* spin-off (6.6 points) in terms of quality. The mix of topics offered by *Le Temps* on *Facebook* is less diverse and more focused on human interest stories compared with the news site. These same reasons account for the

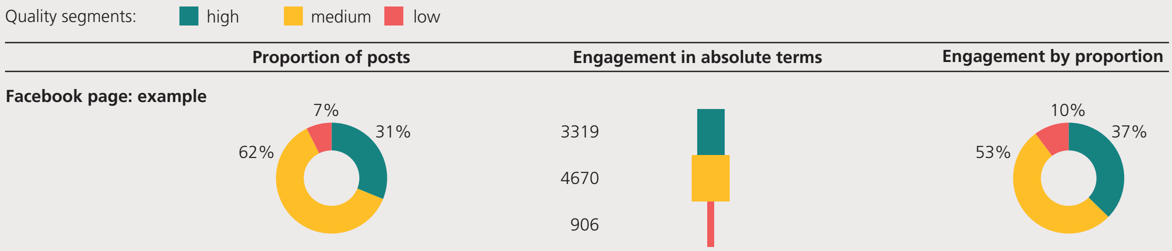
Facebook page	Quality Score Facebook	Quality Score News site	Difference
NZZ	7.9	7.5	0.4
SRF News	6.9	6.9	0.0
Tages-Anzeiger	6.7	6.7	0.0
RTS Info	6.7	6.9	–0.2
Le Temps	6.6	7.3	–0.7
CdT Online	6.3	6.4	–0.1
RSI News	5.7	6.6	–0.9
tio.ch (20 minuti)	5.5	6.0	–0.5
24 heures	5.3	6.2	–0.9
lematin.ch	5.3	5.5	–0.2
watson.ch	4.3	5.5	–1.2
blick.ch	4.3	4.3	–0.0
20 Minuten	4.2	5.3	–1.1
20 minutes online	3.8	5.1	–1.3

Diagram 10: Quality comparison between *Facebook* pages and providers' own websites

The diagram shows the quality score for 14 *Facebook* pages of Swiss information media compared with their own websites. Also shown are the differences in quality between the two offerings. The underlying data incorporates all *Facebook* stories with some information-based journalism content as well as all stories on the home pages of the news sites – based on the random sample for 2016 (*Facebook* stories n = 1,708; stories on news sites n = 5,434).
Interpretation example: nzz.ch, with a score of 7.9, is the highest-quality *Facebook* offering among the pages analysed. The quality on *Facebook* is 0.4 points better than the website.

fall in quality associated with the *Facebook* offerings of *RSI news* and *24 heures*. As regards most quality-driven media, however, the outlets studied in this segment remain largely true to their brand essence as quality-driven outlets when it comes to their offering on *Facebook*. They make sure their *Facebook* offering is of high quality, even if the volume of material is limited. Leading the field is *NZZ*, which not only tops the rankings with 7.9 points, but even scores 0.4 points more on *Facebook* – with its highly relevant and context-based content – than on its own site *nzz.ch*. *SRF News* (6.9 points), *RTS info* (6.7 points), *Tages-Anzeiger* (6.7 points) and *Corriere del Ticino Online* (6.3 points) all manage to maintain their solid quality scores on *Facebook* too.
But can a media provider on *Facebook* – the central news platform for younger generations in particular – get itself talked about on social media too on the back of high-quality stories? In other words, to what extent can a response be elicited from users?

Illustrative diagram



Interpretation example: 31% of stories published on the page used in the example belong to the "high" quality segment, 61% to the "medium" and only 7% to the "low". The highest number of user responses (4,670) is generated from the medium quality segment. In percentage terms, this equates to 53% of all user responses. A provider is particularly efficient when it achieves more engagement (diagram on the right) with one of the three quality segments than it offers (diagram on the left). In the case in point, this applies to the "high" quality segment. Users respond to a disproportionately high degree (proportion of 37%) to high-quality stories (proportion of 31%). The opposite is true of the medium segment, where the offering is substantial (61%) but the number of user responses (53%) is disproportionately low.

In terms of attention on social media, it is evident that while traditional Swiss media companies are largely present on *Facebook*, their levels of activity differ and they achieve very different responses from users with their stories. Stories are only widely commented on, "liked" or "shared" under certain conditions. This becomes clear if we adopt an empirical approach and relate the quality of stories to the number of user responses. The level of user activity varies and depends on different factors. Firstly, the prominence enjoyed by the media brand plays an important role, followed by whether the content of the offering is consistent with its profile. For example, 74% of all user responses on the *Facebook* page of *NZZ* are to high-quality stories. Conversely, users of the *Blick* page mainly become active (54%) in response to low-quality stories.

Both the quality on offer and the user response to the three quality segments vary significantly between the 14 *Facebook* pages studied (see diagrams 11a and 11b). The *Facebook* pages are listed by segment, with daily and online papers first, followed by tabloid and commuter papers, and finally outlets associated with broadcasters. It can be seen that daily and online papers and public broadcasting providers place more high-quality stories on *Facebook* than other segments and outlets (left column), while the low-quality segment dominates on the *Facebook* pages of tabloid and commuter papers. It is also clear that stories from the red and yellow segments enjoy the highest levels of engagement in absolute terms, and this is particularly true of tabloid and commuter outlets (middle column). Users respond more often therefore to stories from the "low" and "medium" segments. This shows that social media, in terms of the basic way they work, function as emotive media.

The findings can be read differently, depending on the perspective. So from the media providers' perspective, it pays to offer content on *Facebook* which is consistent with their own profile and aimed at specific target groups – regardless of the overall quality associated with a medium. And as can be seen, users are especially active if the quality of content on *Facebook* matches their expectations. High engagement values are particularly welcome because this enhances reach on social media. But having said this, studies also reveal that user responses on social platforms do not really indicate that users are engaging with journalistic content in any meaningful way. Results suggest that it is more a case of user responses being coloured by the responses of others or being guided by teasers, headlines and initial fleeting impressions. In fact, user responses on social media mainly tend to occur when users have little appetite for really getting to grips with stories (or where any effort on their part might be required).

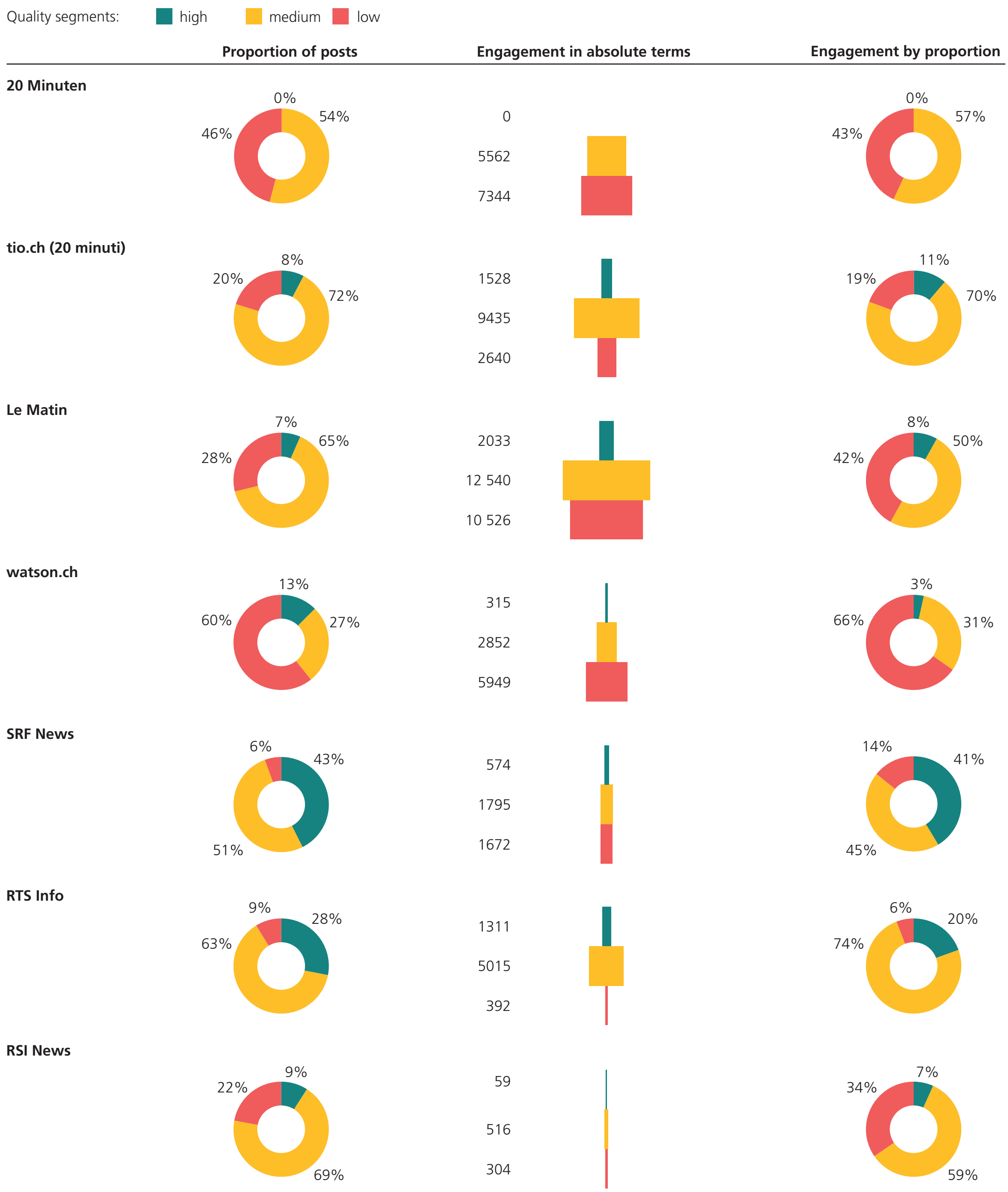
Story quality and user response

Stories are divided, based on a traffic light system, into three quality segments of low quality, medium quality and high quality (see the illustrative diagram). This involved breaking down the range of empirical values

Diagrams 11a and 11b: Quality of offering on Facebook pages and user responses

The diagram shows how the 14 *Facebook* pages differ in terms of the quality of their offering and what kind of user response they generate with what level of quality (see the box with the heading "Story quality and user response". The underlying data incorporates all *Facebook* stories with some information-based journalism content – based on the random sample for 2016 (n = 1,708).

Interpretation example: 66% of stories published on the *Facebook* page of *NZZ* belong to the "high" quality segment. This quality segment also generates the most user responses (9,596). In percentage terms, this equates to 74% of all user responses.



for the quality scores achieved by all the stories studied into three segments of equal size. The lowest quality segment contains all *Facebook* stories achieving scores below 4.39. The "medium" quality segment covers stories with scores between 4.40 and 7.19. Stories with scores above 7.20 belong to the "high" quality segment. This makes it possible to represent – for all *Facebook* pages studied – the proportions of low-, medium- and high-quality stories for each individual *Facebook* page. Besides the proportion-based values for stories (the circular diagram on the left), it is also possible – in combination with the engagement values – to say something about how many user responses a medium can generate with a given quality segment. The illustrative diagram in the middle shows engagement levels in absolute terms, while the circular diagram on the right shows engagement as a percentage.

From the perspective of democratic theory, it is, of course, a positive thing that those providers which pursue a quality-driven strategy away from social media can also manage to generate lots of user responses with high-quality content on *Facebook* too. By contrast, the fact that tabloid and commuter media are able to improve their engagement levels with low-quality stories in particular is something of a problem. This is a cause for concern insofar as their *Facebook* audience is also increasingly made up of young adults, which creates potential for undesirable socialisation effects. And the more young users obtain their information from the *Facebook* pages of the tabloid or commuter press alone, the less this demographic group will benefit from a supply of high-quality offerings.

VI. A concentrated media market

The start of the "long tail" is characterised by significant tendencies towards concentration, i.e. unlike the long back end of the online public sphere, the front end is experiencing increasing concentration and a decline in the diversity of providers. Media concentration is consistent with growing commercialisation within the media system. More and more, media organisations are developing into businesses which no longer earn most of their money through the production of journalism but through activities which have nothing to do with journalism (or are only marginally related to it) and are not expected to cross-subsidise journalism either. Commercialisation is nothing new and began before the advent of digitalisation, but digitalisation is certainly reinforcing the process. Because media use is migrating towards online, where professional providers are barely able to earn sufficient money through journalism, only those few information providers able to cover the costs (which are high online too) of operating a technically advanced and well-staffed information platform with plenty of self-generated content will have the potential to reach a mass audience.

The message from this Yearbook is clear: in German-speaking Switzerland, the three biggest Swiss media firms claimed 71% of the online market reached by professional information media in 2016. In each of French- and Italian-speaking Switzerland, meanwhile, the figure is as high as 88%.

Concentration within media markets

The level of concentration within the media markets associated with the press, radio, television and online forms is identified in two steps. First, all information outlets which reach over 0.5% of the population are recorded every year for each market in the various linguistic regions, and then their controlling parties are identified. The owners or most important shareholding groups of media companies are defined as the controlling parties. Next, the overall circulation or overall usage is determined for each controlling party's information outlets and the percentage share of the overall circulation or usage in the market studied is calculated for each controlling party. If a business is controlled by several parties with equal rights, the relevant conglomerate is shown as the controlling party. For 2016, some 36 controlling parties were recorded for the 166 information offerings studied. With a view to comparing the three media concentrations between the linguistic regions, the concentration rate as measured (CR3) is shown. The concentration rate indicates the share controlled by the three biggest players in the market and is expressed as a percentage for the market as a whole. The level of media concentration is determined and discussed for German-speaking, French-speaking and Italian-speaking Switzerland. All outlets are considered that reach more than 0.5% of the population in the respective linguistic region according to WEMF AG für Werbemedienforschung (print) or Net-Metrix (online).

In the Swiss press market, the concentration process started relatively late (in international terms) but then accelerated rapidly. For a long time, Switzerland had a media system with very little concentration, but now the level of concentration within the Swiss media system, both press and online, is similar to that of, say, the United Kingdom, whose media system is deemed

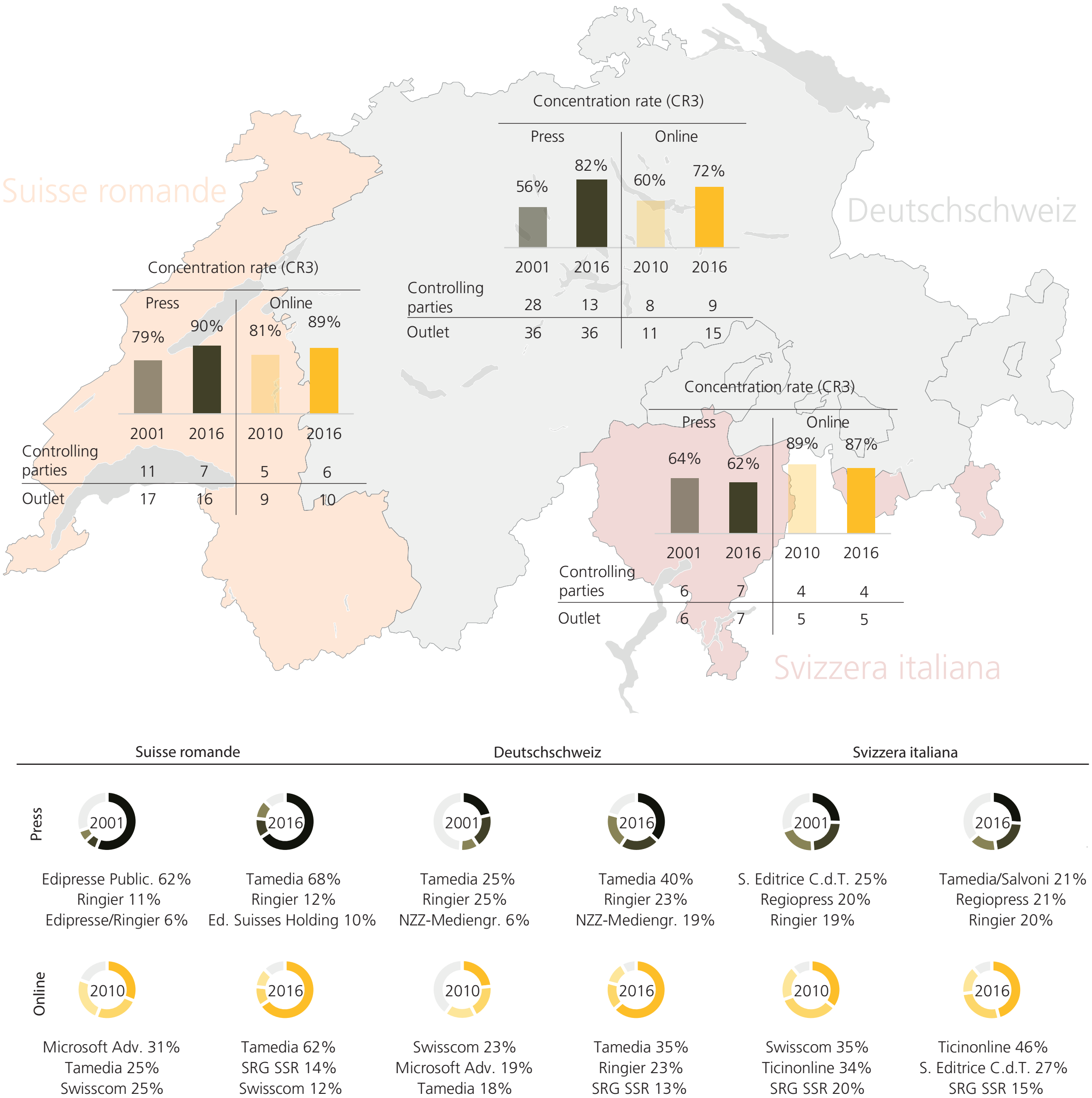


Diagram 12: Concentration within the press and online market

The diagram shows how dominant the three biggest controlling parties are within a specific market. The reference years (2001 for the press; 2010 for online) give some idea of how things have changed over time. The number of controlling parties and outlets is also shown. The circular graphics illustrate the level of concentration and clearly show the respective shares of the top-three controlling parties (source: WEMF, Net-Metrix).

Interpretation example: In French-speaking Switzerland, the three largest media firms (*Tamedia AG* 66%; *Editions Suisses Holding SA* 11%; *Ringier AG* 11%) controlled 90% of the press market as a whole in 2016. In the reference year of 2001, this share was much lower and other media firms made up the top-three controlling parties.

to be heavily commercialised – with the exception of the public service *BBC* (which enjoys something of a privileged position). Within the press market, French-speaking Switzerland in particular has a high level of media concentration. The dominance of *Tamedia AG*, which enjoys a market share of 68%, is especially striking. There are also no publishing houses from French-speaking Switzerland among the three players with the greatest market share.

In the online market, there is even less diversity than in the press market as regards information offerings with any kind of reasonable reach. The majority of online offerings are controlled by the same media firms which already enjoy a dominant position in the press or broadcasting market. Offerings such as *20minuten.ch* or *blick.ch* are gaining users, while offerings with less reach are only growing slowly. New online offerings, with the exception of *watson.ch*, often remain niche products with limited reach, while the digital offerings of regional media firms, like the news site *suedost schweiz.ch*, struggle to reach a wide audience too. This shows that professional online offerings with significant reach can find markets hard to break into. It remains to be seen, after a supposedly record-breaking crowd funding initiative, whether the new online platform *Project R (Republik)* succeeds in generating sufficient reach and revenue over the medium and long term (the same could also be said of the new project *Bon pour la tête* in French-speaking Switzerland).

With the diversity of media providers so limited already in Switzerland, it is imperative at least to preserve the diversity of outlets and the diversity of editorial content; and the quality of these offerings must be high. As regards quality, the good news is that most outlets offer measurably good or even very good quality (see point IV). The bad news is that the very offerings that attract the greatest use, which also belong to the biggest media organisations *Tamedia AG* and *Ringier AG*, offer significantly lower quality and even reduce the quality of their offering further still on the increasingly important platform of *Facebook*. Another problematic development is the announcement by *Tamedia* in summer 2017 of its intention to merge large parts of the previously independent editorial teams from individual outlets into units covering specific linguistic regions. The fact that the dominant player in the Swiss media scene is reducing the diversity of its offering to such a large extent might make some sense in the light of the structural crisis. But this is not good news for the quality of the Swiss media system, especially since more media firms are expected to follow suit.

What is the purpose of the Yearbook?

Since it first appeared in 2010, the aim of the Yearbook has been to deepen the discussion regarding the quality of the media and make a contribution towards improving their quality. 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 media content. The Yearbook is based on the long-held view 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 the kind of journalism they wish to be exposed to, the media makers will have a benchmark for the kind of journalism they want to produce and be responsible for, and politicians will gain a feel for how the media world is developing and for the resources available for information-based journalism in Switzerland.

Our quality concept

This Yearbook is underpinned by a normative concept of quality, which takes it as read that information media do an important job for society as part of a properly functioning democracy. From the functions performed by public communication, it is possible to derive four quality dimensions, which are widely embedded in both academic research and journalistic practice. Firstly, the "relevance" dimension is intended to say something about the ratio of hard news to soft news, and also the weight given to stories regarding matters at an institutional level compared with reporting focused on individual people. The "diversity" quality dimension measures whether events are being reported from many different points of view in terms of both content and geography. "Provision of context" is high where current events are framed in relation to longer-term developments and topical implications. Lastly, the "professionalism" quality dimension includes whether reporting is primarily factual (instead of emotional) and whether it is generated by editorial staff themselves, as well as the level of source transparency.

Who is responsible for the Yearbook?

The Yearbook is produced and published by the fög – Research Institute for the Public Sphere and Society / University of Zurich (www.foeg.uzh.ch). Nine academics and seven students are involved in the research and vouch for the quality of the analyses.

Who provides funding and support for the Yearbook?

The Yearbook is funded by the charitable foundation known as the Kurt Imhof Stiftung für Medienqualität (www.kurt-imhof-stiftung.ch) and the University of Zurich. The Board of Trustees comprises the following people: Christine Egerszegi-Obrist, Mark Eisenegger, Barbara Käch, Yves Kugelmann, Fabio Lo Verso, Dick Marty, Oswald Sigg and Peter Studer.

The foundation owes the funding for the project to the following donors: Adolf und Mary Mil-Stiftung, AZ Medien AG, the Swiss Federal Office of Communications OFCOM, Die Schweizerische Post AG, NZZ-Mediengruppe, Verband Interpharma, Fondazione per il Corriere del Ticino, Paul Schiller Stiftung, Ringier AG, Schweizerische Mobiliar Versicherungsgesellschaft AG, Somedia AG, Verband Medien mit Zukunft, Zürcher Kantonalbank and various individual donors.

Contributions to the Kurt Imhof Stiftung für Medienqualität can be transferred using the following bank details: ZKB Zürich-Oerlikon – Account No.: 1100-1997.531 – Bank Postal Account: 80-151-4, IBAN: CH28 0070 0110 0019 9753 1, Bank Clearing No. 700, SWIFT: ZKBKCHZZ80A.

Contact: fög – Forschungsinstitut Öffentlichkeit und Gesellschaft / University of Zurich, Andreasstrasse 15, CH-8050 Zurich, tel.: +41 44 635 21 11, e-mail: kontakt@foeg.uzh.ch.

Where can I find the Yearbook and the studies?

The Yearbook is available both in printed form (ISBN 978-3-7965-3695-3) and as an e-book (ISBN 978-3-7965-3712-7) from Schwabe Publishers (www.schwabeverlag.ch) and appears each autumn. The studies are published as separate e-publications and are also available from Schwabe Publishers.

The mark of the printing and publishing house Schwabe, founded in 1488, dates back to the very beginnings of the art of printing and derives from the circle of artists around Hans Holbein. It is the printer's mark of the Petris, and illustrates Jeremiah 23:29: "Is not my word like as a fire? saith the LORD; and like a hammer that breaketh the rock in pieces?"

Qualität der Medien – Studien und Reflexionen erscheinen als periodische Einzelpublikationen

Studien Qualität der Medien
Schweiz – Suisse – Svizzera

Herausgegeben vom fög – Forschungsinstitut Öffentlichkeit und Gesellschaft / Universität Zürich
im Auftrag der Kurt Imhof Stiftung für Medienqualität, Zürich. ISSN 2296-5114.
Die Studien von 2010 bis 2012 finden sich auch im Jahrbuch Qualität der Medien des jeweiligen Jahrgangs.

Mario Schranz, Jörg Schneider, Mark Eisenegger: **Medienvertrauen – eine vergleichende Perspektive.** SQM 1/2016. 16 Seiten. PDF E-Book. ISBN 978-3-7965-3652-6. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

Jörg Schneider, Mark Eisenegger: **Wie Mediennutzer in die Welt schauen: Die Newsrepertoires der Schweizerinnen und Schweizer und ihre Themenagenden.** SQM 2/2016. 26 Seiten. PDF E-Book. ISBN 978-3-7965-3653-3. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

Jens Lucht, Linards Udris: **Kommerzialisierung und Konzentration der Medien im internationalen Vergleich.** SQM 1/2013. 32 Seiten. PDF E-Book. ISBN 978-3-7965-3231-3. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

Mark Eisenegger, Joël Orizet, Mario Schranz: **Medien im Social Web – Journalistischer Mehrwert?** SQM 2/2013. 19 Seiten. PDF E-Book. ISBN 978-3-7965-3232-0. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

Linards Udris: **Schweizer Medien im Wahlkampf. Qualität der Medienberichterstattung vor den Eidgenössischen Wahlen 2011.** SQM 1/2012. 25 Seiten. PDF E-Book. ISBN 978-3-7965-3227-6. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

Mario Schranz, Mark Eisenegger: **Onlinenews – Die Qualität von Presse- und Onlinetiteln im Direktvergleich.** SQM 2/2012. 18 Seiten. PDF E-Book. ISBN 978-3-7965-3228-3. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

Mark Eisenegger, Patrik Ettinger: **Kriminalitätsberichterstattung in der Schweizer Presse.** SQM 3/2012. 31 Seiten. PDF E-Book. ISBN 978-3-7965-3229-0. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

Vinzenz Wyss, Michael Schanne, Annina Stoffel: **Medienkritik in der Schweiz – eine Bestandesaufnahme.** SQM 4/2012. 18 Seiten. PDF E-Book. ISBN 978-3-7965-3230-6. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

Esther Kamber, Kurt Imhof: **Nordwest- und Südostschweiz: Konzentration und publizistisches Angebot im regionalen Pressemarkt.** SQM 1/2011. 20 Seiten. PDF E-Book. ISBN 978-3-7965-3222-1. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

Linards Udris, Kurt Imhof, Patrik Ettinger: **Problematisierung des Fremden in der direkten Demokratie.** SQM 2/2011. 33 Seiten. PDF E-Book. ISBN 978-3-7965-3223-8. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

Mark Eisenegger, Sibylle Oetiker, Mario Schranz: **Monopol der Schweizerischen Depeschenagentur (sda) und Übernahmepraxis von Agenturberichten in der Presse.** SQM 3/2011. 27 Seiten. PDF E-Book. ISBN 978-3-7965-3224-5. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

Pascal Bürgis, Angelo Gisler, Mark Eisenegger: **Einfluss von Public Relations in der Unternehmensberichterstattung.** SQM 4/2011. 21 Seiten. PDF E-Book. ISBN 978-3-7965-3225-2. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

Colin Porlezza, Stephan Russ-Mohl, Marta Zanichelli: **Die doppelte Schwachstelle: Fehlerhäufigkeit und Corrections Management.** SQM 5/2011. 18 Seiten. PDF E-Book. ISBN 978-3-7965-3226-9. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

Patrik Ettinger: **Qualität der Medienberichterstattung zur Minarettinitiative.** SQM 1/2010. 10 Seiten. PDF E-Book. ISBN 978-3-7965-3220-7. Open Access.

Mario Schranz, Mark Eisenegger, Kurt Imhof, Jörg Schneider: **Wirtschaftsberichterstattung in der Krise.** SQM 2/2010. 11 Seiten. PDF E-Book. ISBN 978-3-7965-3221-4. Open Access.

Reflexionen Qualität der Medien
Schweiz – Suisse – Svizzera

Herausgegeben vom fög – Forschungsinstitut Öffentlichkeit und Gesellschaft / Universität Zürich
im Auftrag der Kurt Imhof Stiftung für Medienqualität, Zürich. ISSN 2296-8393.

Peter Studer: **Leisten Presseräte, was sie sollen und wollen? Der Schweizer Presserat im Vergleich mit dem schwedischen, deutschen und britischen Modell.** RQM 1/2014. 23 Seiten. PDF E-Book. ISBN 978-3-7965-3345-7. Ca. sFr. 12.– / € (D) 12.– / € (A) 12.50.

Zu bestellen unter: www.schwabeverlag.ch

Qualität der Medien
Schweiz – Suisse – Svizzera

Herausgegeben vom fög – Forschungsinstitut Öffentlichkeit und Gesellschaft / Universität Zürich im Auftrag der Kurt Imhof Stiftung für Medienqualität, Zürich

Jahrbuch 2017
Qualität der Medien

2017. 160 Seiten. Gebunden.
Zahlreiche Abbildungen, Grafiken und Tabellen.
sFr. 59.– / € (D) 59.–
Bei Abnahme im Abonnement:
sFr. 49.– / € (D) 49.–
ISBN 978-3-7965-3695-3
ISSN 1664-4131

E-Book: www.schwabeverlag.ch
ISBN E-Book 978-3-7965-3712-7
ISSN E-Book 2296-7931

Schweizer Medien unter der Lupe

Zum achten Mal erscheint 2017 das *Jahrbuch Qualität der Medien – Schweiz Suisse Svizzera*. Seit der ersten Ausgabe 2010 liefern die Herausgeber jährlich aktuelle Kennzahlen zu den Mediengattungen Presse, Online / Social Media, Radio und Fernsehen. Die Forschergruppe der Universität Zürich untersucht neben der Entwicklung der inhaltlichen Qualität auch die Nutzungsentwicklung und die Finanzierungsbasis der Informationsmedien. Ebenso ordnen die Wissenschaftler Trends und neue Phänomene wie beispielsweise die fortschreitende Medienkonzentration oder die Bedeutung von Social Media für die Informationsmedien in einen grösseren Kontext ein. Die begleitend zum Jahrbuch erscheinenden *Studien* setzen in diesem Jahr Akzente im Bereich des digitalen Strukturwandels der Öffentlichkeit. Die fundierten Analysen bieten über das Jahrbuch hinaus eine Grundlage für die medienpolitische Debatte in der Schweiz.

Das *Jahrbuch Qualität der Medien* ist eine informative Quelle für Medienschaffende, Führungskräfte aus Politik und Wirtschaft, für die Wissenschaft und alle, die sich mit der Entwicklung unserer Medien und deren Inhalten auseinandersetzen wollen. Es will das Bewusstsein für die Qualität der Medien stärken und die Diskussion über den Wandel unserer medialen Öffentlichkeit anregen.

Das *Jahrbuch Qualität der Medien – Schweiz Suisse Svizzera* wird erarbeitet durch das fög – Forschungsinstitut Öffentlichkeit und Gesellschaft / Universität Zürich (www.foeg.uzh.ch). Es wird gefördert durch die *Kurt Imhof Stiftung für Medienqualität* (www.kurt-imhof-stiftung.ch). Sein Ziel ist es, das Qualitätsbewusstsein für die Medien in der Schweiz zu stärken.

Studien **und** ***Reflexionen Qualität der Medien***

Neben dem Jahrbuch erscheinen auch die E-Journals *Studien* und *Reflexionen Qualität der Medien*.
Sie sind erhältlich unter: www.schwabeverlag.ch
ISSN Studien 2296-5114
ISSN Reflexionen 2296-8393

Zu bestellen unter:
www.schwabeverlag.ch / auslieferung@schwabe.ch / Tel. +41 (0)61 467 85 75