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# Yearbook 2022

## The Quality of the Media

### Main findings

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Increasing news deprivation has a negative impact on the democratic process

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# Main findings – increasing news deprivation has a negative impact on the democratic process

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## Summary

News media are central to the political process. The first two in-depth studies published in the 2022 Quality of the Media Yearbook have highlighted a worrying development. For our first in-depth study, we used an innovative method to track the way in which young people consume media on their smartphone, working with Adrian Rauchfleisch of the National Taiwan University and Pascal Jürgens of the University of Mainz. The results of the study are sobering: news consumption on mobile devices is remarkably low. On average, young people spend only seven minutes a day consuming news media on their smartphone. This insight corroborates our previous diagnosis of «news deprivation», i.e., people do not get enough news which is professionally produced and meets professional quality standards. This is a problematic finding. Our second in-depth study, which we carried out with Tobias Keller and Lukas Golder of gfs.bern, comes to the same conclusion. Using the referendum on 13 February 2022 as an example, we have found that the group of news-deprived individuals participates much less frequently referendums than people with other news repertoires. The news-deprived are also less interested in politics overall and have little trust in its institutions. Thus, both in-depth studies emphasise the importance of journalism for Switzerland's political processes, but they also show that journalism's reach in society is decreasing. This has a negative impact on political awareness, trust in institutions and democratic participation.

Four further in-depth studies and our annual analyses investigate the difficult environment in which journalism currently operates. They show that, while the overall quality of the media remains relatively high, some quality deficits are emerging in several areas.

Journalism relies on resources, especially for reports on international events. Our study on the quality of the coverage of the war in Ukraine has shown that Swiss media, despite their overall high quality, are deeply dependent on external sources. Only a few outlets still work with foreign correspondents. Instead, news outlets frequently rely upon news agency reports. Especially in war coverage, military and state sources are also frequently used. This can be problematic because these sources often disseminate propaganda and may use disinformation strategies for their own ends. There have also been blind spots in the coverage of the war in Ukraine. Media have focused on the warring factions – Russia and Ukraine – while neglecting to investigate more complex aspects of the conflict such as the resulting threat of famines in the Global South.

Highlighting complex economic relationships is a duty not just for media in general but also for economic journalism. Our study on recent developments in the quality of economic reporting, which we carried out in collaboration with Nadine Strauss of the University of Zurich's Department of Communication and Media Research, has particularly highlighted deficiencies in contextualising macroeconomic relations. Economic reporting and overall media reporting are also lacking diversity: our findings have shown that women continue to play a minor role in covering economic topics. On a positive note, however, the proportion of women in economic reporting has seen the fastest growth of all analysed subject areas, including politics, sports and culture, since 2015.

Journalism operates in an increasingly challenging social environment. In the West, journalists are faced with more and more manipulation attempts and threats of violence – even in Switzerland. This is problematic: the watchdog role of the media relies on journalists who will not be intimidated and do not shy away from asking critical questions. Nearly nine out of ten (87%) journalists who participated in an in-depth study by Lea Stahel of the University of Zurich's Department of Sociology have said that they were targeted by at least one manipulation attempt during the coronavirus pandemic. Most such manipulators utilise information as a weapon, e.g., by spreading defamatory information about journalists or threatening to withhold information. Threatened or actual physical violence is rarer, but its magnitude is still concerning.

Reporting conditions also differ between media regions. An in-depth study of Italian-speaking Switzerland, carried out in partnership with Colin Porlezza of the Università della Svizzera italiana (USI) in Lugano, has clearly shown the highly specific structural conditions of that market. Italian-speaking Switzerland exhibits some characteristics normally present in the broadcast markets of small states, where limited advertising and consumer markets are detrimental to producing journalism and to differentiate various media products. In light of these conditions, the news media in Ticino are of a high quality compared to those of the other linguistic regions, but they are particularly severely affected by dwindling resources.

Looking at the overall quality dynamics in the Swiss media landscape, the coronavirus pandemic had a much more dramatic impact on the Swiss news media in 2021 than it did in the previous year. The media's focus on relevant political topics and particularly Swiss politics over soft news has increased considerably compared to one year before, as shown in the previous Yearbook. Contextualisation has also improved: the past years' trend of decreasing background reporting has halted for the time being. This comes at the cost of diversity, however. Geographical diversity, in particular, has declined severely. At a time marked by global challenges (the war in Ukraine, the pandemic, inflation, the energy crisis, climate change), the share of foreign news coverage has shrunk by ten percentage points over the course of the past six years, with the pandemic years seeing an accelerated decline. The media have instead turned their attention to national topics and events. As the significance of foreign reporting declines, which is especially important to a small nation such as Switzerland that depends on other countries, so does the nation's ability to respond rapidly to international events and learn from them.

These main findings summarise the key insights gained from the six studies and the results of the 2022 Yearbook into the development of media quality, media consumption, Swiss attitudes to journalism, the financial situation of journalism in Switzerland, and the overall media concentration. They are followed by a conclusion with recommended actions.

## 1 Studies

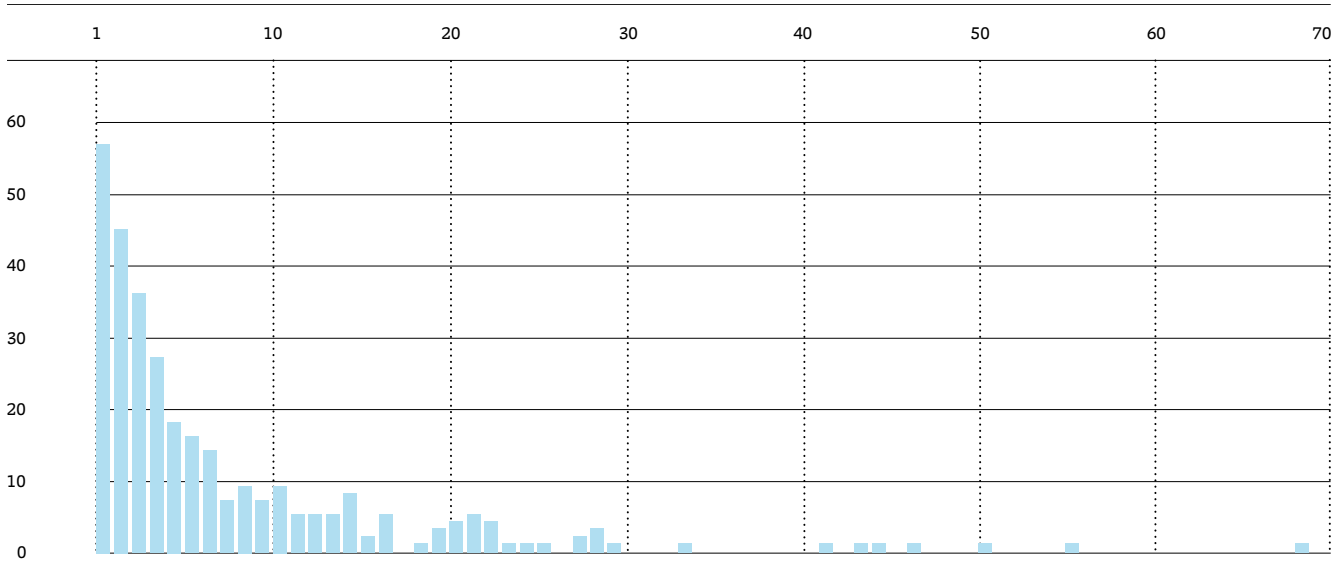
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### 1.1 Mobile media consumption among young adults. Intensity of news consumption and its causes

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Smartphones are the main source of information for young adults. But the specific mobile media consumption habits of this group, especially in Switzerland, remain relatively opaque. Interested researchers have largely been limited to survey results, i.e., voluntary self-disclosure. We wanted to use an innovative method to find out details about the mobile news consumption of young adults: What factors influence it? Is there a connection between news consumption and political knowledge? To do so, we carried out a mobile tracking study in conjunction with a participant survey ahead of the weekend in September 2021 when the Swiss voted in a referendum. We used social-media adverts to recruit 309 participants between 19 and 24 years of age. These participants agreed to connect their smartphones to our research server, which then recorded their data traffic for four weeks. The collected data allowed us to generate a detailed overview of mobile media consumption and avoid social-desirability bias, which tends to occur in questionnaire-based surveying methods.

Our results are sobering: the participants only spent an average of 7.2 minutes a day consuming professionally produced news on their smartphone. While men consume 10.7 minutes of news on their smartphones on average, the corresponding figure for women is a mere 5.4 minutes. The oldest participants spent slightly more time consuming news media. Despite stating that the devices are their main source of information, young people rarely use their smartphones to access news media (cf. Figure 1). Our analysis of effective media consumption through tracking has therefore clearly corroborated the diagnosis of widespread news deprivation, i.e., a deficiency of professionally produced news, among young people in Switzerland that our survey-based research has highlighted for many years (Schneider & Eisenegger, 2019). A recent tracking study examining the use of media across the entire Swiss population further supports our conclusion that news deprivation is widespread (Reiss, 2022).



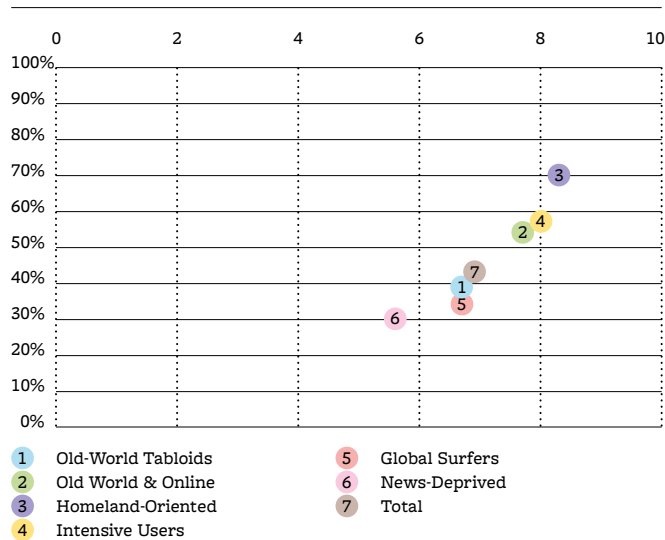
**Figure 1: Frequency distribution of mobile news consumption in minutes per day**

The frequency distribution diagram shows how many minutes of news the participants consumed on average per day. The x-axis represents the average duration of news consumption in minutes, while the y-axis indicates to how many participants a specific duration applies.

*Reading example:* One participant consumed news media for an average of 68 minutes per day; 57 participants consumed news media for less than a minute per day.

As well as the tracking study, we carried out a supplementary survey to find determining factors for the intensity of news consumption. Our statistical regression analyses have found that people with a greater degree of trust in the media, a higher rate of radio and television usage, or an increased interest in soft news in the field of sports tend to consume more news on their smartphones. Social-media consumption as such is irrelevant to the intensity of news consumption. The use of social media does, however, indicate a more varied consumption of news from a wide range of sources. This implies that social-media users are more likely to feel loyal to specific brands of

journalism. There is no correlation between political interest and a higher intensity of news consumption, but political interest does indicate a preference for diverse news sources. It seems as though people with an interest in politics seek information from multiple sources. Our study also did not find any relationship between the level of news consumption and the extent of political knowledge, with the latter having been tested using five knowledge-based questions about two referendums from 21 September 2021. This is likely to be due to the very low average level of news consumption of only around 7 minutes per day.



**Figure 2: Willingness to vote by news repertoire type**

The x-axis of the diagram shows in how many referendums members of the general voting population («Total») and members of each repertoire type participate, while the y-axis shows what percentage of participants voted in the referendum on 13 February 2022. The diagram is based on a representative population survey carried out among voting-age Swiss residents in the context of the VOX analysis (n = 3,168).

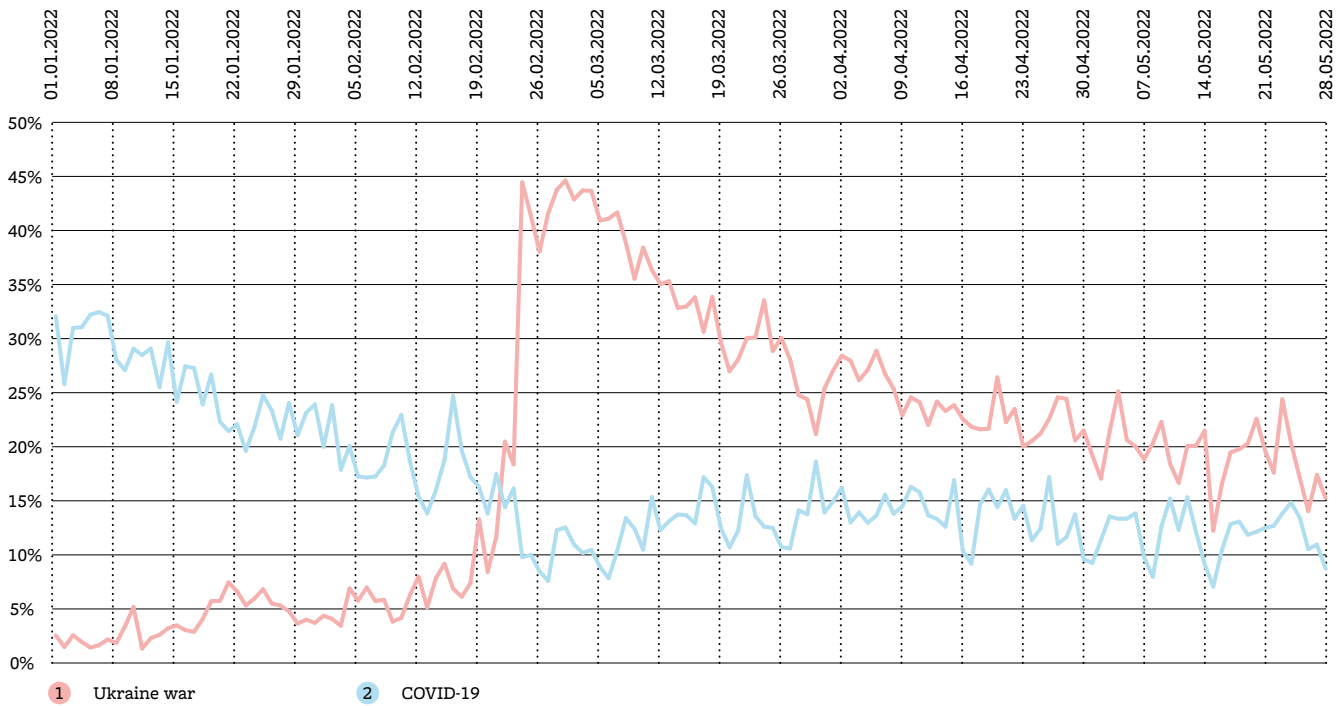
*Reading example:* Participants of the «News-Deprived» repertoire type stated that they vote in 5.6 out of 10 referendums; 30% of the «News-Deprived» group voted in the referendum on 13 February 2022.

## 1.2 Media repertoires, news deprivation and political participation

As sources of information, the media play a key role in referendums. But the people of Switzerland do not all consume the same media to keep informed. To find out how individual media preferences (a person's «media menu») affect voting behaviour and political participation, we carried out another study among voting-age people across Switzerland within the scope of the VOX analyses of the referendum on 13 February 2022 that was based on a

representative survey conducted by gfs.bern. We connected the findings of that survey with our own data on various media consumption patterns («news repertoires»). The results show that there is a connection between news repertoires and voter participation. Participation is particularly high (70%) among voters with a «Homeland-Oriented» repertoire type, i.e., people who regularly consume traditional Swiss media such as newspapers, radio news, and TV news. By contrast, the «News-Deprived», who exhibit the lowest news consumption of all user groups, only have a voter participation rate of 30%, much lower than that of the other five repertoire types. This does not mean, however, that the «News-Deprived» are fully excluded from this political process. After all, they do participate in six out of ten referendums (cf. Figure 2), which means that they can be motivated on a situational basis. The «News-Deprived» are the opposite of the «Homeland-Oriented» group, which is made up of older individuals who routinely consume traditional media and participate in referendums.

Not only does a person's media menu determine their political participation, it also explains political interest. The «News-Deprived» show a much lower interest in politics. They also have the lowest levels of trust in the government out of all repertoire types. The actual voting behaviour of the Swiss varies depending on the type of media they use. The proportion of votes in favour of a referendum topic vary significantly between repertoire types with deviations of up to 41 percentage points in individual referendums. This suggests that the various news repertoire types exhibit different voting behaviours. Again, the greatest deviations come from the «News-Deprived». On 13 February 2022, they cast more votes against the proposed funding package for Swiss media and more votes in favour of the tobacco ban than all other groups. The «News-Deprived» were therefore more likely to vote with the challengers and against the establishment, i.e., the Federal Council and Parliament.



**Figure 3: Percentage of reporting on the war in Ukraine out of total coverage**

The figure shows how much of the overall reporting activity of the Swiss media consisted of content referring to the war in Ukraine (red line). The share of content covering the COVID-19 pandemic (blue line) has been used as a reference figure.

*Reading example:* In the first days after the start of the invasion on 24 February, up to 45% of all items published by the Swiss media referred to the war in Ukraine. The figure for late May is around 18%.

### 1.3 Quality of coverage of the war in Ukraine

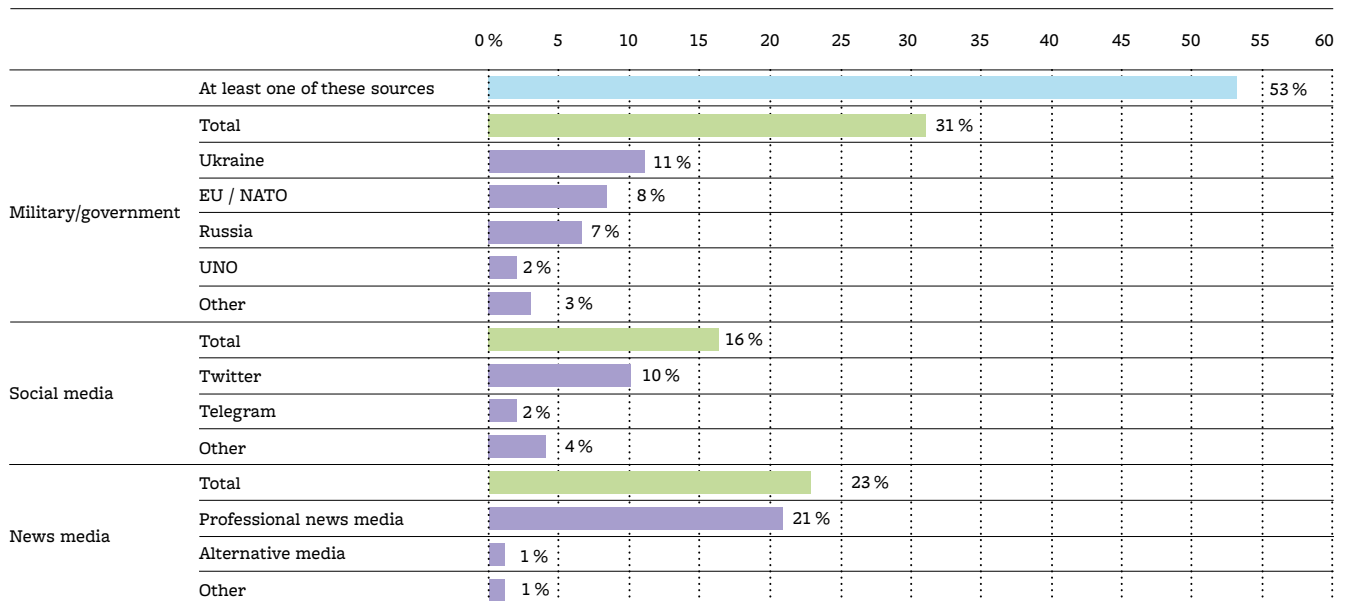
The third in-depth study examined how Swiss media has been reporting on the war in Ukraine, focusing on several specific quality indicators. We analysed 13 online media using a combination of manual ( $n = 1,950$ ) and automated ( $n = 25,825$ ) content analysis. Our results show that the invasion of Ukraine has triggered an extremely high media attention and replaced the coronavirus pandemic as the most high-profile issue in late February 2022 (cf. Figure 3). Overall, the quality of the coverage by the analysed media has been relatively good.

For example, reporting on the war has incorporated a relatively wide range of topics and exhibited an above-average degree of contextualisation of 25%.

This is considerably higher than the reference figure of 14% for topic-independent overall reporting in 2021. There has also been a certain extent of self-reflection on the role of the media in the war, with 4% of all items incorporating such a perspective. From the perspective of media ethics, another positive aspect of the coverage has been its cautious use of images. The analysed items hardly contain any problematic depictions of dead or injured people.

There have, however, been shortcomings in the reporting on the war in Ukraine. In addition to news agencies, other news media (21%) and social media (16%), especially Twitter, have been important external sources of content (cf. Figure 4).

Governmental and military sources, cited in 31% of reports, have also played a key role. This high level of dependence on external sources risks the un-



**Figure 4: External sources in foreign reporting**

The figure shows the percentage of items in which external sources play a central role. We examined three types of external sources along with certain characteristics: military/government (and the origin of these sources), news media (and the type of news media), social media (and specific platforms). A single item could contain all three types, meaning that the percentage values of the green bars can theoretically add up to 300%. The analysis took all items with no reference to Switzerland (= foreign reporting) into account (n = 1,198).

*Reading example:* In 31% of all items with no reference to Switzerland, governmental and/or military sources play a central role. In 11% of all items with no reference to Switzerland, Ukrainian governmental and/or military sources play a central role.

questioning reproduction of narratives favoured by the warring parties. Generally speaking, Ukrainian governmental and military sources (21%) are considerably more present in the war coverage than those of Russia (12%), and Ukrainian sources rarely elicit criticism compared to Russian ones. This is understandable to an extent as Russia is the aggressor and has had a reputation for running disinformation campaigns for many years. Reporting has been excessively focused on the two conflicting parties of Ukraine (20%) and Russia (13%), but neglected indirectly affected regions such as countries of the Global South that are on the brink of famine.

Our study has confirmed that specific media types perform differently. Subscription media and

public broadcasting seek to contextualise the events of the war, while the tabloid press and commuter media report on the war in a more episodic manner, i.e., they focus on each day's developments. Dependence on news agencies and external sources, in general, is high across all media types. The tabloid press and commuter media rely on agency reports in 62% of their foreign coverage. Unlike subscription media and public broadcasting, where 32% and 18% of items, respectively, come from correspondents, most tabloid and commuter outlets do not operate their own network of correspondents. nzz.ch and letemps.ch in particular published many correspondents' reports from various countries during the analysed period.

#### 1.4 Quality of economic reporting

Economic reporting plays an important role in Switzerland due to the country's status as a world-leading financial and business centre. The dual function of economic reporting (information and early warnings) warrants a closer look at its visibility and quality. The fourth in-depth study in the Yearbook thus examines journalistic reports on topics of the economy and economic policy across various Swiss media in the period from 2015 to 2021, focusing on a range of quality aspects. Our results have shown that economic coverage only makes up 16% of all content published by the Swiss media, although national dailies – particularly NZZ and Le Temps – and the public broadcasting media report on economic issues more frequently. On average, economic topics feature more prominently in the Swiss media than culture (12%) and sports (13%), but they lag behind politics (29%, excluding financial and economic policy) and soft news from the area of human interest (29%). Business topics relating to specific companies make up most of the economic coverage (2021: 68.2%), a trend which has heightened over the past few years. Macroeconomic contexts tend to receive less coverage (cf. Figure 5). This declining focus on macroeconomic reporting comes at the expense of the early-warning function played by economic journalism, e.g., alerting the public of developing bubbles and recessive tendencies. The data further reveals that the percentage of contextualising content on economic topics was in a steady decline after 2015 but rebounded significantly in 2021, which is likely to be a one-off effect of the increased contextualisation of economic developments sparked by the coronavirus pandemic. On a positive note, outlets published a significantly greater volume of their own economic analyses between 2015 (62.9%) and 2021 (76.7%), although online media rely on agency reports much more frequently than offline formats.

Finally, the study has found that the percentage of women in economic reporting is lower than in overall reporting and in other topics, but the trend turned positive in 2019 and reached a new high in 2021 (23.3%).

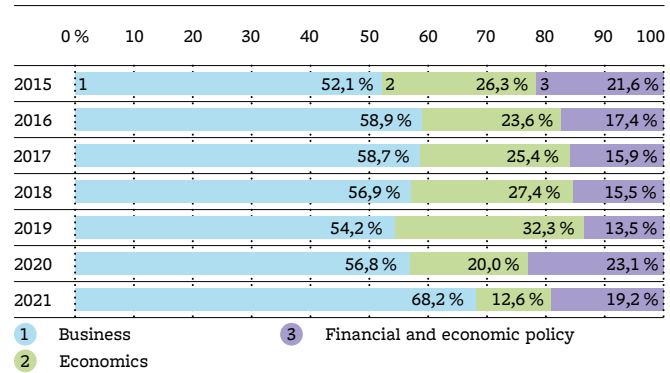


Figure 5: Economic reporting by topic over time

The figure shows what percentage of overall economic reporting (n = 23,248) was made up of three key subject areas (business, economics, financial and economic policy).

*Reading example:* In 2018, 56.9% of economic reporting was dedicated to business topics, 27.4% was dedicated to events in the overall economy, and 15.5% was dedicated to financial and economic policy.

#### 1.5 The media market of Italian-speaking Switzerland

Another in-depth study was dedicated to the media market of Italian-speaking Switzerland, the second smallest media region in Switzerland by population (after the Rhaeto-Romance market). With a population of around 350,000, Italian-speaking Switzerland comprises the predominantly Italian-speaking canton of Ticino and around 10% of inhabitants of the three Italian-speaking regions of Mesolcina, Breghia and Poschiavo in Grisons.

Small media markets such as this face particular challenges: their advertising and consumer markets are limited, which makes it difficult to secure media funding. The media landscape of Italian-speaking Switzerland has changed considerably over the past few years, particularly due to economic pressure. New publications aimed at maximising reach have been launched, and some new online providers have entered the picture. But the smaller media market still produces less differentiated content than its larger counterparts. The economic situation of publications in Italian-speaking Switzerland remains difficult, with the coronavirus pandemic exacerbating the problem further. Our long-term analysis has also shown, however, that the overall average reporting



	Italian-speaking Switzerland (news outlet)	German-speaking Switzerland	French-speaking Switzerland
Public television	8,1 Telegiornale Sera	7,6	7,6
Public radio	7,8 Radiogiornale	8,2	7,8
Private television	7,3 Tele Ticino Ticino News	6,0	7,8
Subscription newspapers (online)	6,3 cdt.ch	6,2	6,5
Subscription newspapers	6,3 Corriere del Ticino & laRegione	6,3	6,7
SRG SSR Online	6,2 rsi.ch	6,4	7,0
Commuter papers (online)	5,8 tio.ch	5,1	5,1
Commuter papers	4,8 20 minuti	5,3	5,1
Sunday papers/magazines	N/A	6,7	6,5
Pure online	N/A	5,8	N/A
Tabloids (online)	N/A	5,3	5,0
Tabloids	N/A	4,9	N/A

**Table 1: Quality scores of news outlets from Italian-speaking Switzerland in comparison**

For each media type, the table shows the median quality score of the individual news outlets for Italian-speaking Switzerland, German-speaking Switzerland and French-speaking Switzerland. The types are ranked by their quality score in Italian-speaking Switzerland in descending order. N/A marks media types that either do not exist within a specific linguistic region or which were not included in the quality analysis. The analysis is based on all items that were included in the quality analysis, selected by a random sampling process across the year 2021 (n = 19,591).

*Reading example:* 20 minuti, the analysed commuter paper in Italian-speaking Switzerland, reached a score of 4.8, which is lower than the average of the analysed commuter papers from German-speaking Switzerland (5.3) and French-speaking Switzerland (5.1).

quality is relatively stable: this small linguistic region produces media of a similar standard to that of comparable services in the larger regions (cf. Table 1).

### 1.6 Attempted coercion and manipulation of journalists

For many years, journalists have increasingly found themselves at the receiving end of verbal and physical attacks, vandalism and bribery – not only in autocratic regimes but also in Western democracies. Such coercive attempts limit journalistic autonomy. They endanger the freedom of the press and the functioning of democracy. This in-depth study in the Yearbook examines how often and in what form Swiss journalists experienced attempts of external manipulation in 2020 and 2021. A survey was carried out among 567 journalists in German-speaking, French-speaking and Italian-speaking Switzerland.

Its results reveal a considerable extent of coercion attempts (cf. Figure 6). As many as three quarters of respondents had experienced at least one at-

tempt of informational manipulation. Most incidents (58.4%) were accusations of conspiracy, with the inflammatory term «Lügenpresse» («lying press») used frequently. Nearly half (49.9%) had been at the receiving end of at least one personal insult or declaration of hatred; respondents cited examples such as «Schwurbler» (someone who spins conspiratorial yarns) or «Journalistenschlampe» («journalist slut»). Around a third (33.4%) had received threats of actions that would endanger their career, such as defamation or complaints to a supervisor. Half of respondents had experienced economic coercion.

Around a third (33.9%) had been urged not to report (negatively) on advertising clients. One out of three respondents (29.2%) had received threats concerning the withdrawal of adverts or clients. The third most common types of experience were of an institutional kind: 42.1% reported that they had been threatened with legal action. Legal action was initiated against 13.2% of respondents.

Psychological and physical violence were the rarest type of experience. Most reports of this kind concerned sexist remarks or sexual harassment (16.2%), followed by stalking and monitoring activi-

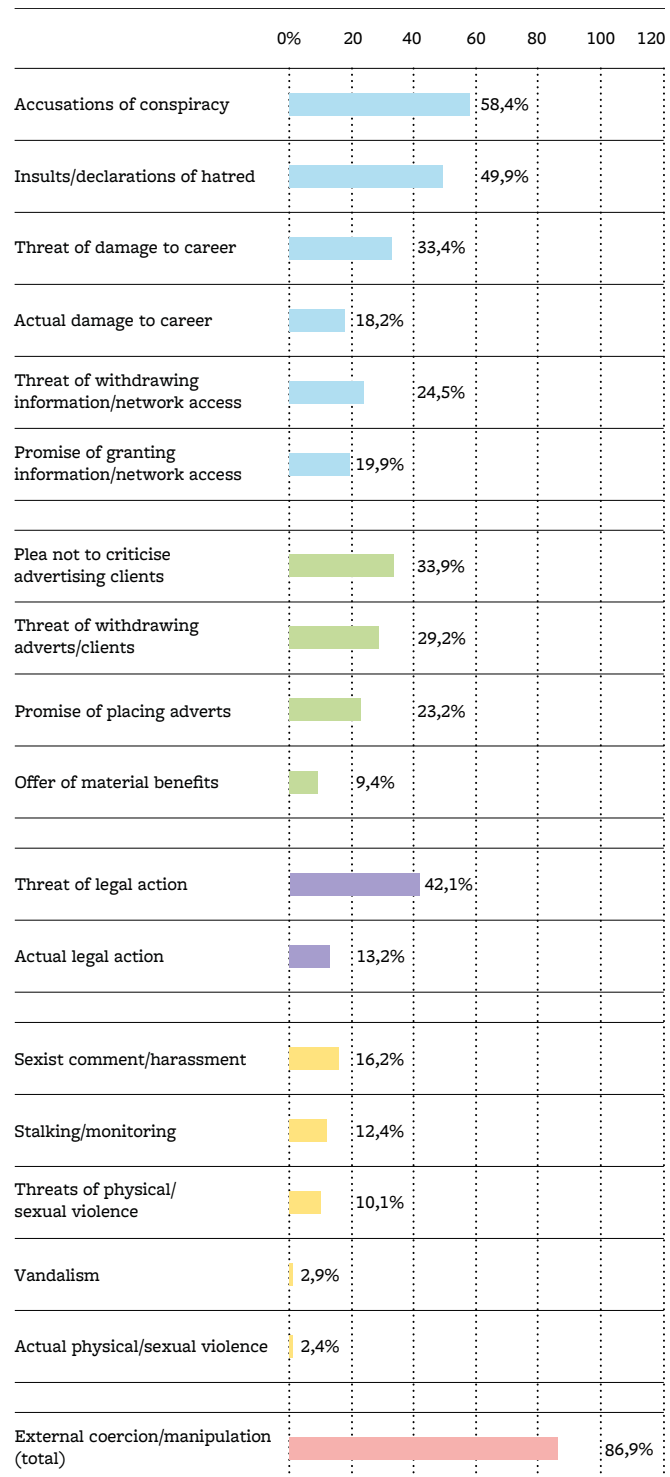
ties, including intrusive phone calls, cyberstalking, and hacking (12.4%). One out of ten respondents (10.1%) had been threatened with physical violence, while 2.4% had experienced actual physical or sexual violence such as jostling, spitting, or groping. Most attempts of coercion or manipulation are carried out through digital communication channels. Journalists covering certain topics such as crime and justice, entertainment, business, or COVID-19 are at increased risk of such incidents. The canton also plays a role: more than nine out of ten respondents who regularly reported on the canton of Schwyz had experienced manipulation attempts (95.8%). Schaffhausen had the lowest incident rate at 76.0%. According to the participating journalists, the people carrying out attempts of coercion or manipulation are usually media consumers (56.4%) or business players (48.4%). These results provide initial insights into coercion and manipulation aimed at journalists during the COVID-19 pandemic in Switzerland.

## 2 Other findings from the Quality of the Media Yearbook

### 2.1 Media quality stable overall – greater focus on politics

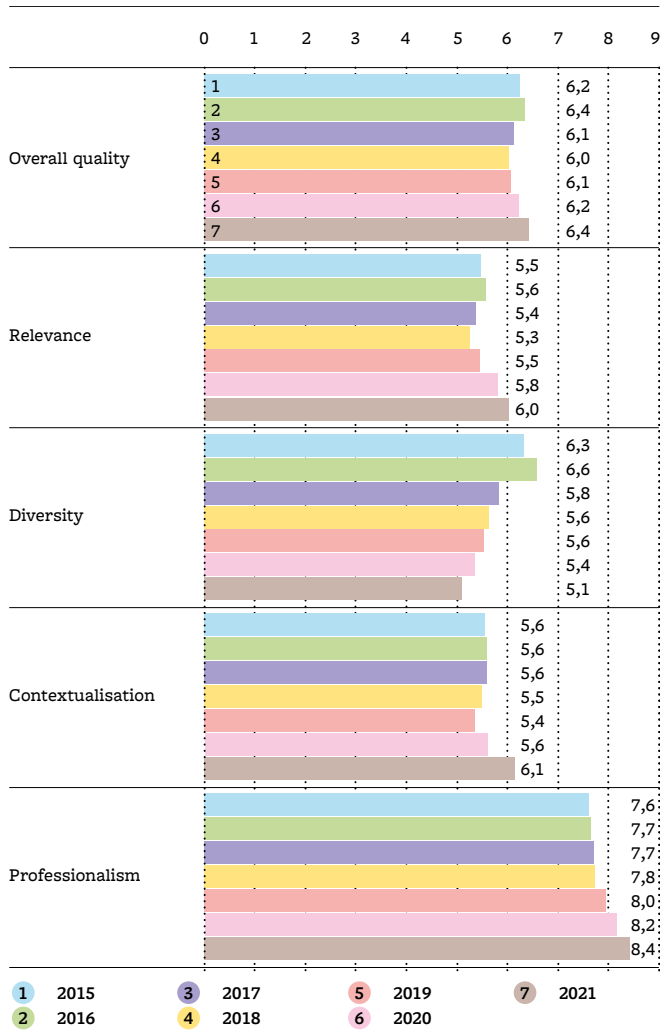
The overall quality of the Swiss media landscape has increased slightly. Since the beginning of the coronavirus pandemic, the media have engaged in contextualisation more frequently. Much like in 2020, they reported on hard news, especially Swiss politics, relatively intensively in 2021. This focus on politics and the corresponding decline in human-interest topics has led to an increase in relevance (cf. Figure 7).

This has a twofold effect on diversity. Firstly, content diversity increases. The media focus on soft news, which had been identified in earlier studies, decreases. This marks the return of a broader, more well-balanced mixture of topics, including politics, economy, culture, sports, and human interest. Of course, a large proportion of coverage during the coronavirus pandemic was dominated by the pandemic as the main topic. Within this topic, however, the media discussed a wide range of aspects (Ei-



**Figure 6: Frequency of external coercion/manipulation**

The figure shows what percentage of journalists experienced each of the 16 subtypes of coercion/manipulation at least once in the past 24 months. Multiple responses were permitted (n = 67).  
*Reading example:* 58.4% of journalists reported that they had been accused of conspiracy in the past 24 months.



**Figure 7: Changes in quality dimensions between 2015 and 2021**

The figure shows the changes in overall quality and the quality dimensions between 2015 and 2021. The quality scores represent the median of the quality scores of the individual news outlets. They are based on all items included in the quality analysis of the random sample taken from the respective years (2015 n = 22,032; 2016 n = 22,226; 2017 n = 22,260; 2018 n = 20,669; 2019 n = 19,861; 2020 n = 17,024; 2021 n = 16,974). Only the 54 news outlets for which there are data from all seven calendar years were selected.

*Reading example:* The average diversity score across all included news outlets fell from 6.3 in 2015 to 5.1 in 2021.

senegger et al., 2020; Eisenegger et al., 2021). Secondly, the coronavirus pandemic has accelerated the trend of decreasing geographical diversity. Over the past six years, the significance of topics and events abroad has declined by ten percentage points as the press increasingly concentrates on national topics and events instead. This internal focus was especially notable in 2021, most likely as a result of the coronavirus pandemic: coverage of national politics and even local and regional politics gained considerable significance during the pandemic. At a time marked by numerous global challenges (pandemic, Ukraine war, climate change, energy crisis, etc.), foreign news reporting is therefore experiencing a decline in Switzerland. Using the data from 2021, we cannot yet predict whether the war in Ukraine will make foreign news coverage a greater priority again.

Public service media continue to deliver the highest quality. Their high reach helps to provide large parts of the population with a high standard of journalism. The tabloid press and commuter media also have a high reach, but their quality is below average across types, although the quality of their print editions improved in the last year. Subscription media, Sunday papers and weekly media also produce content of an above-average quality. Some private television channels have made notable quality improvements, including in the long-neglected field of contextualisation – a positive result for these regional outlets.

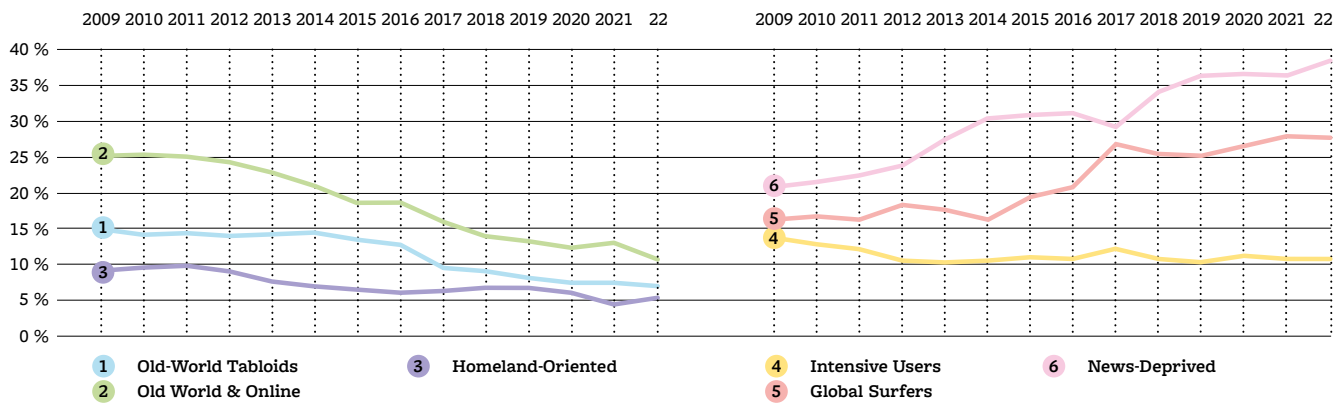


Figure 8: Long-term decline of Old-World news repertoires and increase of New-World news repertoires since 2009

The figure shows how the share of each of the six repertoire types developed in the period from 2009 to 2022 (n = 48,064). From 2016 to 2017, the set of underlying media categories was extended.

Reading example: The share of «News-Deprived» consumers grew from 21.0% in 2009 to 38.5% in 2022.

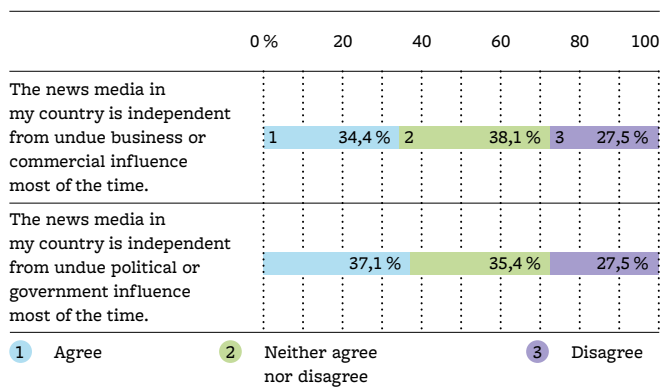
## 2.2 Media consumption – proportion of «News-Deprived» consumers continues to grow

The trend towards digital media consumption habits continues as the annual representative population survey carried out by the fög and GfK has shown. Data from the current year have reconfirmed the long-term decline of «Old-World» news repertoires and the increase of «New-World» news repertoires. In 2022, «Old-World» news repertoires make up 23.1% of the Swiss population, while «New-World» repertoires have risen to 76.8% (cf. Figure 8). With a total share of 38.5%, the group of the «News-Deprived» has seen the greatest year-on-year percentage increase again (+2.1 percentage points). Only 21.0% of the Swiss population belonged to the «News-Deprived» in 2009; this corresponds to an increase of 17.5 percentage points by 2022. The increasing use of digital media has also given rise to new, digitally available formats, especially digital video news and podcasts. Text news remain the most popular format, however, as the findings of the Reuters Institute Digital News Report show: 38% of respondents in Switzerland state that they primarily consume online news in a text format. At the same time, 32% already incorporate videos into their news consumption, while 21% claim to use video-based news and

text-based news in equal measure. Only 9% primarily watch videos or state that they prefer to consume news in a video format and only read text-based news sometimes. Persons who prefer videos cite a variety of reasons: 32% of respondents find videos more comfortable than reading the news. Around a quarter of respondents also state that videos are more appealing and report on events more authentically than texts, further explaining that they like to see important persons in the news. 21% more frequently encounter videos than they do texts, for example, in their social-media feeds. Podcasts are also gaining in popularity among the Swiss population, with 35% of respondents having listened to at least one podcast in the previous month. Younger people consume podcasts particularly often.

## 2.3 Attitudes – stable interest, declining trust in the media

Interest in the news is a significant factor in the development of public opinion, making it very important for any functioning democratic society. In 2022, 50.1% of Swiss respondents state they are «interested» or «very interested» in the news, down from 57.0% in 2021 and 59.0% in 2020. These figures emerge from the Switzerland-specific survey data



**Figure 9: Perception of economic and political independence of the news media**

The figure shows the extent to which participants agree that Switzerland's news media are independent from undue business or commercial influence on the one hand, and from undue political or government influence on the other hand. (Reuters Institute, 2022)

*Reading example:* In Switzerland, 37.1% of respondents agree that the country's news media are independent from undue political or government influence, while 27.5% disagree with this notion.

published in the Reuters Institute Digital News Report. Interest in the news is thus declining, which correlates with our findings of increasing news deprivation. Compared to other countries, however, the decline is moderate in Switzerland. By individual topics, consumers are most interested in news about politics (47.0%) and the coronavirus pandemic (46.3%), while considerably fewer people follow coverage of lifestyle topics (32.6%) and business and finance (30.5%). As well as interest in news media, trust in such media and professional journalism is essential: it enables the news media to fulfil their role in public discussion and opinion formation processes. In 2022, fewer than half of Swiss respondents (46.0%) «strongly» or «tend to» agree to the statement that one can trust the news media most of the time. This constitutes a decline in media trust of 5 percentage points following the first brief period of growth after many years in 2021.

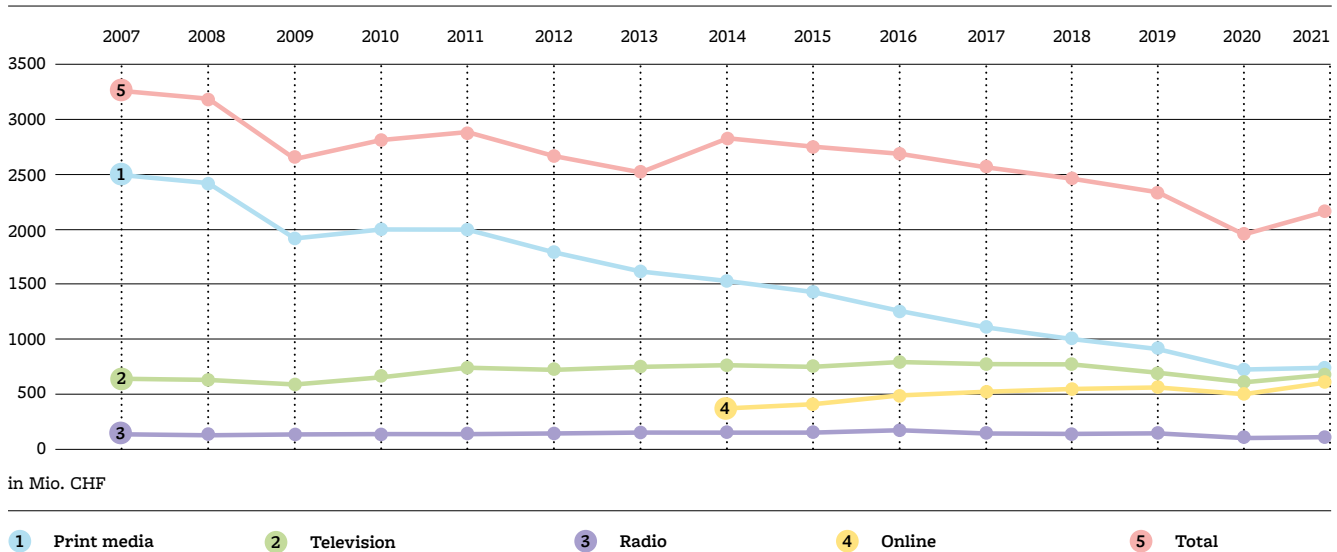
What do the people of Switzerland think about the independence of their news media? The respondents were divided about the independence of the news media from undue economic or commercial influence (cf. Figure 9). While 34.4% agree that Swiss news media are independent from undue economic

or commercial influence, 27.5% disagree. Assessments of undue political or government influence on Switzerland's news media are similar. A little more than a third of respondents (37.1%) believe that the country's news media are independent from undue political influence, while 27.5% feel that political institutions do exert an undue influence on the media in Switzerland. In an international comparison, Switzerland's results for both aspects are around the median (Reuters Institute, 2022). The perceived independence of journalism from politics and business is highest in the Scandinavian countries, such as Norway (politics: 43%, business: 41%) and, above all, the Netherlands (politics: 46%, business: 44%). In Southern Europe, especially Spain and Italy (politics: 13%, business: 15% in both countries), it is very low.

## 2.4 Funding – journalism continues to suffer from financial pressure

Overall, the largest Swiss media companies look back on a successful business year. This is due to new and lucrative business segments outside of journalism, and the advertising market also experienced a short-term rebound in 2021. In the long term, however, advertising revenues – which remain the most important source of income for many media – are declining. Despite the upswing in 2021, they are still lagging behind pre-pandemic levels (cf. Figure 10). When advertising revenues decline, income from the reader market become more important. But, despite a slow upward trend, Swiss readers' willingness to pay for content remains low. In 2022, only 18% of respondents in Switzerland stated that they had paid for online news – such as in the form of a subscription, a donation, purchases of apps or e-issues, or a one-off payment for access to an article – in the past year (2021: 17%).

Journalism continues to suffer from financial pressure. In recent months, various publishers have announced staff reductions. Tamedia did so by merging the local editorial offices of Der Bund and Berner Zeitung; Somedia discontinued the free weekly Glarner Woche. The Olten-based local magazine Kolt, founded in 2009, and the science magazine Higgs were forced to close down entirely for financial reasons. New media projects have launched during



in Mio. CHF

1 Print media      2 Television      3 Radio      4 Online      5 Total

**Figure 10: Development of the Swiss advertising market**

The figure shows the development of advertising revenue in millions of CHF for print media, radio and television as compared to all online advertising media in Switzerland. Our figures for online advertising revenue are different to those cited in the last issue of the «Quality of the Media» Yearbook. This is because the Swiss Advertising Statistics Foundation has included the revenues of the digital automobile categories, which were available again during the current survey, in the annual totals of the time series in order to ensure comparability across the time series. (Source: Swiss Advertising Statistics Foundation, 2022)

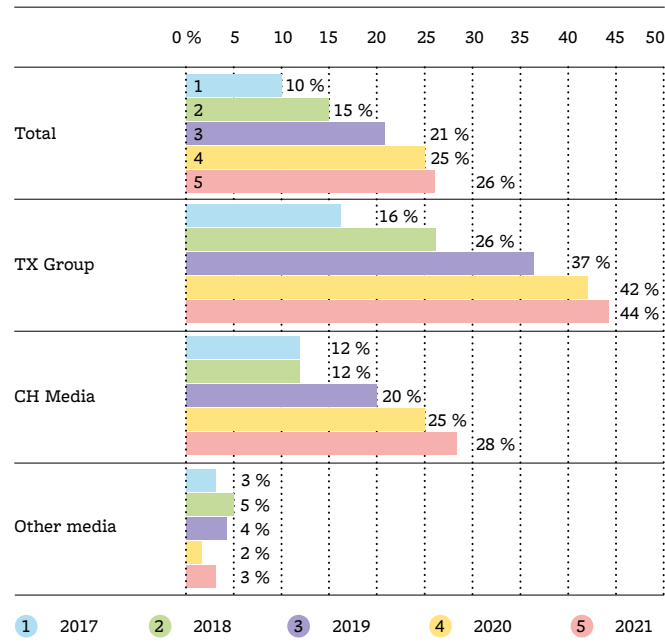
*Reading example:* Advertising revenue has been sinking across all media types since 2007 and amounts to CHF 2,154 million in 2021 (down from CHF 3,260 million in 2007).

the same period: the Bern-based online magazine *Hauptstadt*, for example. But they are facing an uncertain future. Following the population's rejection of the media support package on 13 February 2022, no relief is in sight. The planned allocation of funds would have benefited smaller regional and local formats in particular.

## 2.5 Media content concentration consolidates at a high level

There has been a dual process of concentration in the Swiss media system in recent years. The volume of shared media content has been rising along with concentration in the reader markets. This is due to network systems with central editorial offices such as those of the TX Group, CH Media and ESH Médias. Network systems allow news outlets to keep operating in economically difficult conditions. At the same time, however, network systems reduce diversity in

the media landscape because more content is being reused and recycled. In Switzerland, this has led to a heightened media content concentration (Vogler et al., 2020). This increased content concentration is clearly visible in the media market of German-speaking Switzerland: between 2017 and 2021, the number of shared items grew from 10% to 26%. This means that around one in four articles produced by journalistic staff are published in at least two different outlets. Looking at the media that have belonged to the network systems of the TX Group and CH Media since 2019, a clear increase in content concentration emerges between 2017 and 2021 (cf. Figure 11). In the TX Group's network system, the proportion of shared items increased from 16% in 2017 to 44% in 2021. The merging of the editorial offices of CH Media's publications has also heightened content concentration from 12% to 28% in the same period. Publications that do not belong to a network system and that were used as reference values exhibit a constant, low proportion of shared items of 3% at present.



**Figure 11: Media content concentration in the German-speaking press market over time, by network system**

The figure shows the development of media content concentration in the press market of German-speaking Switzerland for the media which, as of 2021, belonged to the network systems of the TX Group (Basler Zeitung, Berner Zeitung, Der Bund, Tages-Anzeiger) and CH Media (Aargauer Zeitung, Luzerner Zeitung, St. Galler Tagblatt). As a reference value, media content concentration was ascertained for selected publications that did not belong to these two network systems (i.e., 20 Minuten, Blick, Die Südostschweiz, Neue Zürcher Zeitung). The percentages of shared editorial articles are depicted (excluding articles based wholly or partly on agency reports).

*Reading example:* The share of shared articles in the TX Group network system's media was 44% in 2021. The value increased by 28 percentage points from 2017.

### 3 Conclusion and recommended actions

The group of «News-Deprived», i.e., people who consume little to no journalistic news, has continued to grow. A record 38.5% of people in Switzerland belong to this group in 2022. We may be tempted to think we shouldn't worry that much about it. After all, perhaps the «News-Deprived» use other sources to keep up to date, or they obtain their democratically relevant information directly from acquaintances in their personal networks? Our study on the relationship between media consumption and the

democratic process, carried out in partnership with gfs.bern, has shown that the opposite is true. The «News-Deprived» are less involved in the democratic process; they are significantly less interested in politics and their trust in institutions, i.e., the government, is below the national average. Journalism that finds its audience is more than a nice-to-have for Swiss democracy. It is essential to the stability of the system.

Our tracking study has confirmed that Swiss journalism struggles to gain sufficient reach. On average, young adults between 19 and 24 years of age only spend 7 minutes consuming news on their smartphone, which is their main channel of information.

Seven minutes are considerably less than it takes to read a single contextualising long-form article from an average newspaper. Seven minutes are also considerably shorter than the duration of an average news programme on television.

The declining social impact of Swiss journalism is puzzling: our studies have shown that Switzerland's journalistic standards remain relatively high despite dwindling resources. Our analysis of the quality of reporting on the war in Ukraine has found a comparatively high quality in the examined media, with high levels of contextualisation taking place. There is a clearly visible journalistic effort to depart from the simplicity of the news ticker and contextualise the war through background reports. On a negative note, however, dependence on external (i.e., governmental) sources from Russia and, in particular, Ukraine is high. This poses the risk of reproducing narratives shaped by warring factions. But an extraordinarily high degree of media self-reflection has been observed in the war coverage. The media are reflecting on their own reporting more intensively than normal.

Even beyond the war, our media quality assessment has yielded some positive results. The overall quality of the Swiss media landscape has increased slightly, and the media have been engaging in greater contextualisation efforts since the beginning of the coronavirus pandemic. Our in-depth study of Italian-speaking Switzerland has also shown that overall quality has remained stable in this small media market despite particularly high resource pressure. Across Switzerland, we have noted a decline in geo-

graphical diversity. Foreign news reporting is experiencing a decline at a time marked by major global challenges such as the pandemic, the war in Ukraine, climate change, and the energy crisis. There are also deficiencies in economic reporting. While company-related business reporting is on the rise, macroeconomic coverage has decreased. This weakens the ability of Swiss economic journalism to detect and sufficiently contextualise macroeconomic risks such as the development of bubbles and recessive trends. Journalism, then, is losing reach in society. This observation ties in with the findings of another study: journalists in Switzerland are subject to coercion and manipulation attempts to a worrying extent.

What are possible solutions? The problem of journalism's decreasing reach and impact must be addressed urgently. Journalism is essential to the stability of the democratic system. Exposure to journalistic news determines whether citizens regularly participate in the democratic process, develop an interest in politics, and trust the democratic institutions. An educational campaign should be launched to raise awareness of the significance of journalism across higher-education institutions and schools. The relevance of journalism to the democratic system must be communicated more intensively and

more effectively, which is what our project «[Check News](#)» aims to achieve. Educational institutions must regularly reflect on and discuss different kinds of journalistic content and their qualitative differences. The narrative on journalism must also change. Our studies have shown that the quality of journalistic reporting remains relatively high. The public discourse on journalism needs to turn positive, and this initiative ought to be spearheaded by high-profile representatives of politics, culture, and business. Journalism, once a proud and respected occupation, must regain the appreciation it deserves considering its importance to the democratic system. Its dearth of resources must be remedied through greater investment to maintain Switzerland's high level of journalistic quality. Following the failure of the support package, there is a need for new media policies that will facilitate the direct and indirect financial support of journalism and its adjacent institutions such as the Swiss Press Council. Finally, journalistic decision makers need to educate themselves on the types of content and channels that effectively reach audiences in the digital era. This may be achieved through intensified collaboration between media makers and academia.



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## Sources and methodology

The analyses in the annually published chapters of the Yearbook are based on primary and secondary data. The following section lists our sources alongside the corresponding approaches.

### Content analysis

Our measurement of media quality is based on a content analysis carried out at the fög – Research Center for the Public Sphere and Society / University of Zurich. We implemented a quality scoring system, where trained coders evaluated each item based on academic standards (no automated quality assessment). The random sample from 2021 covered 20,099 items from 63 Swiss media (cf. chapter «Methodology» in the Yearbook).

### Representative surveys

We worked with data from the Reuters Institute Digital News Report again this year. The global report contains representative survey data on digital news consumption habits (more than 90,000 interviews) from 46 countries, including Switzerland. The fög – Research Center for the Public Sphere and Society / University of Zurich is the Swiss partner organisation of this large-scale study carried out by the Reuters Institute for the Study of Journalism at the University of Oxford. Around 2,000 internet users in German-speaking and French-speaking Switzerland participated. Using online panels, the project extracted representative samples for internet users over 18 years of age (cf. chapter «Methodology»). Secondly, our analyses also relied on survey data from an annual representative media consumption study by the fög and GfK Switzerland. Carried out at the beginning of every year since 2009, it consists of around 3,400 online interviews (cf. chapter «Methodology»).

## Indicators from the media industry

Our studies on the distribution and concentration of information media and the media market are based on circulation volumes and reach figures from the media research organisation WEMF. The media funding data come from the Swiss Advertising Statistics Foundation.

## What is the purpose of the Yearbook?

Since its first issue in 2010, the Yearbook has aimed to deepen the discussion about the quality of the media and improve public awareness of the services performed by objective journalism. It constitutes a source for media makers, politicians, businesspeople, academics, and everyone else with an interest in the development of the media and its content. The Yearbook was inspired by the realisation that the quality of a democracy depends on the quality of its media. It provides its audience with a benchmark for determining which type of journalism it wants to be exposed to; it provides media makers with a benchmark for reflecting on the type of journalism they wish to produce and take responsibility for; it provides policymakers with an insight into the development of the media and the resources available to objective journalism in Switzerland.

## Our definition of quality

This Yearbook is based on a normative understanding of quality, which believes that the objective media play an important societal role in any functioning democracy. The functions of public communication give rise to four quality dimensions that are broadly rooted in academic research and journalistic practice. Firstly, the dimension of relevance aims to shine a light on the ratio of hard news to soft news and the weight of content about institutional processes compared to coverage of individuals. The dimension of diversity assesses whether events are covered from a wide range of geographic and content perspectives. Contextualisation is high when current affairs are embedded in long-term developments and thematic relationships. Finally, the dimension of pro-

professionalism assesses whether reporting is objective, whether it comes directly from the editorial office and to what extent sources are made transparent.

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

### Who is behind the Yearbook?

The Yearbook is prepared and published by the fög – Research Center for the Public Sphere and Society / University of Zurich ([www.foeg.uzh.ch](http://www.foeg.uzh.ch)). Six academic staff and five student assistants are involved in the research and ensure the quality of the analyses.

### Who funds and supports the Yearbook?

The Yearbook is funded by the University of Zurich and the charitable Kurt Imhof Foundation for Media Quality ([www.kurt-imhof-stiftung.ch](http://www.kurt-imhof-stiftung.ch)). The Foundation Board consists of: Christoph Degen, Christine Egerszegi-Obrist, Mark Eisenegger, Barbara Käch, Yves Kugelmann, Ulrich E. Gut, Christina Leutwyler, Maude Rivière, Nenad Stojanović. The Foundation has received funding for this project from the following partners: Avenir Stiftung, Federal Office of Communications (OFCOM), CH Media, Die Schweizerische Post AG, Fondazione per il Corriere del Ticino, NZZ, Paul Schiller Stiftung, Ringier AG, Somedia AG, SRG SSR, Swisscom, Verband Medien mit Zukunft and various individuals.

Donations for the Kurt Imhof Foundation for Media Quality can be made to the following bank account: ZKB Zürich-Oerlikon, account no.: 1100-1997531, PostFinance account no.: 80-151-4, IBAN: CH28 0070 0110 0019 9753 1, bank clearing no. 700, SWIFT: ZKBKCHZZ80A

### Where can the Yearbook and related studies be found?

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

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