Chapter 3

Austria

Confirmed democratic performance while slowly digitalising

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Introduction

Located in the centre of Europe, Austria is a small country with about 8.8 million inhabitants. It is a part of the German-language area, with some linguistic minorities (mainly Hungarian, Slovenian, and Croatian) in the south and east of the country. Austria shares borders with Czechia, Germany, Hungary, Italy, Slovakia, Slovenia, Switzerland, and Liechtenstein. With the latter three countries, Austria also shares the German language. Therefore, for some media organisations, the competition is also in a larger language market. Austria's only metropolis is Vienna, comprising nearly two million people living in and around the capital. Politically, Austria is considered to be a mature liberal democracy.

Freedom in the World 2021: status "free" (Score: 93/100, down from 95 in 2017). One point has been deducted in the category of Freedom of expression and belief, justified by repeated verbal assaults of journalists by politicians, as well as by a high level of media concentration (Freedom House, 2021).

Liberal Democracy Index 2020: Austria is placed in the top 10–20% bracket – rank 24 of measured countries, considerably down since 2009, but up from 30 in 2019 (Varieties of Democracy Institute, 2021).

Freedom of Expression Index 2018: rank 38 of measured countries; the score decreased over 2008–2018 at a statistically significant level, and down from rank 9 in 2016 (Varieties of Democracy Institute, 2017, 2019).

2020 World Press Freedom Index: rank 18 of 180 countries, down from 11 in 2016–2018 (Reporters Without Borders, 2020).

In Austria, two parties have dominated parliament and government since its restoration of political independence after World War II in 1955: the social

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democrats (SPÖ) and the conservative people's party (ÖVP). In the first two decades of the new century, smaller parties increased their political relevance, in particular the far-right freedom party (FPÖ, once under the leadership of the late Jörg Haider) and the environmentalist Green party. In 2017, following general elections, a coalition government was formed by ÖVP and FPÖ. However, they split less than two years later, following the publication of a video recorded during a sting operation showing the FPÖ party leader engaged in a private corruption talk in a luxury resort at Ibiza. Snap elections later in 2019 reconfirmed the leadership by ÖVP, which established another coalition government, this time partnering with the Green party. After a few weeks in office, in March 2020, Covid-19 threatened to hit Austria, bordering heavily affected Italy.

The Austrian media landscape is characterised by two dominating groups: the public service broadcaster Österreichischer Rundfunk (ORF) – the uncontested market leader in the electronic media (television, radio, and online) – on the one hand, and the largest newspaper *Kronenzeitung* – reaching 27 per cent of the Austrian population (2019; down from 40.4% in 2009) – on the other. Since autumn 2016, the online edition of this boulevard-style paid newspaper, *Krone.at*, ranks second in the Austrian online ranking. In addition, the wife of the publisher and the editor-in-chief of *Kronenzeitung* runs the daily free-sheet *Heute*.

Austria's private commercial television is in a relatively weak position. The first private channel started as late as 2003 (ATV). As the result of a lost lawsuit at the European Court of Human Rights, Austria released legislation to allow for private commercial broadcasting only in 2001.

Outside the capital Vienna, media ownership concentration has wiped out competition almost entirely in the daily newspaper business. While two provinces do not have any regional newspapers in addition to the regional edition of *Kronenzeitung*, only one publisher each dominates the remaining provinces (for details, see Indicator E1 – Media ownership concentration national level, and Indicator E2 – Media ownership concentration regional level).

There is little counter-balance to incumbent media companies by civil society initiatives. Third-sector media exist both in analogue (television, radio, press) and Internet-based digital formats (blogs, social media), but their influence on public opinion and deliberation is limited.

According to the Media Pluralism Monitor of the Centre for Media Pluralism and Media Freedom at the European University Institute in Florence, risks to media pluralism in Austria were considered high for five indicators, medium for eleven indicators, and low for only four indicators in 2019 (Seethaler & Beaufort, 2020: 8ff). This result compares unfavourably to the 2018 edition, when only two indicators showed high risks and nine medium risks (Seethaler et al., 2019: 3).

Covid-19

From mid-March to mid-May 2020, the then new government imposed severe restrictions on freedoms of mobility and interactions, such as closed borders to neighbouring countries, a ban on all public gatherings and events, curfew, and shutdown of all shops except food supply, pharmacies, and a few others. During this shutdown, linear television (both public and private-commercial) increased their audience, daily newspapers (both on paper and online) their readership, and radio their listeners. Despite this, because of the economic restrictions, advertising slumped, causing revenue losses in advertising-based media. Most affected were daily free-sheets, as well as fully advertising-based private-commercial television and radio channels.

In order to prevent media companies from collapsing, the government substantially increased its media subsidies, along with unprecedented financial support for various sectors of the Austrian economy. The government increased the regular press subsidy for newspaper distribution by the factor 1.5. In addition, subsidies based on the numbers of printed newspaper copies were allocated. This way, the highest-circulation newspapers (all of them yellow press) received the largest share; smaller quality-oriented papers received less. Furthermore, private-commercial television stations received about EUR15 million in addition to the previously foreseen EUR 20 million subsidies. In total, the government allocated EUR 32 million to support the media during the first phase of the Covid-19 crisis.

Leading news media sample

Our media sample for MDM 2020 consisted of seven leading news media representing different types and different ownership: editors-in-chief and leading journalists have been interviewed from one national quality daily newspaper (*Der Standard*), one regional daily newspaper (*Salzburger Nachrichten*), one political news magazine (*Falter*), and one popular news portal (*Krone.at*). Moreover, public television and public radio were also part of our sample. In this case too, editors-in-chief and journalists were interviewed (ORF 2, Ö1). Finally, one private-commercial television broadcaster (PULS 4) and one daily free-sheet (*Heute*) were part of our sample, but interviews were not possible. In addition to these, the chair of the journalists' union was interviewed.

Indicators

Dimension: Freedom / Information (F)

(F1) Geographic distribution of news media availability 3 POINTS

In 2011
3 POINTS

A wide and stable variety of news media is available to Austrian citizens. There is a small regional bias between rural areas and the Vienna region. The distribution of news media remains variable concerning media types.

In 2020, thirteen paid-for dailies are available to Austrian citizens, which is three less than ten years ago (Grünangerl & Trappel, 2011). Two regional newspapers with a long tradition closed for economic reasons (*Salzburger Volkszeitung* and *Neue Kärntner Tageszeitung*, both in 2014) as well as the national newspaper *Wirtschaftsblatt* (in 2016). All of the remaining papers are morning dailies – six of them national and seven regional. The national dailies are all based in Vienna, but they all offer regional editions broadly available all over Austria (ÖAK, 2018). Furthermore, 231 non-daily papers are available (free-of-charge and paid for; see also ÖAK, 2018).

Free-of-charge dailies have become a cornerstone of Austria's newspaper market; however, their role continues to be significant only in the urban areas in eastern Austria (*Heute*, circulation: 568,769). In addition, Moser Holding runs a small-scale free-of-charge format in Western Austria (*Tiroler Tageszeitung Kompakt*, circulation: 12,388). Seven daily newspapers also offer Sunday editions. Some of the latter show a circulation higher than their weekday editions (for instance, *Kronenzeitung Sonntag* with 1,324,220, *Kurier am Sonntag* with 322,032 or *Die Presse am Sonntag* with 84,202). Newspaper sales in Austria are still mainly based on subscription (41–96% compared with 1–9% on single-copy sales; see also Table 1). Mediaprint continues to dominate newspaper distribution nationwide, and other national newspapers have started cooperations in order to compete with Mediaprint in the eastern regions of Austria (Horizont, 2000). With the entry in the market of the new daily newspaper *Österreich* in 2006, Verlagsgruppe News began to expand its own distribution network as well. All Austrian daily newspapers developed an e-paper solution within the last decade, although Austrian newspaper users remain loyal to print media: pure e-paper subscription reaches 1–17 per cent of the print circulation (lowest: *Österreich*, highest: *Die Presse*; see also Table 1). While at the time of the 2010 MDM report all Austrian newspapers had free online editions, many switched to paywall solutions since then (e.g., *Salzburger Nachrichten*, *Kleine Zeitung*, *Die Presse*).

Table 1 *Comparison of single-copy sales to subscription sales, 2018*

Newspaper	Type	Circ.	Issues per year	Price single copy[a] (EUR)	Price annual subsc. (EUR)	Single-copy sales[b]	Subsc. sales[b]	E-paper subsc.	% single-copy sales	% subsc. sales
Kronenzeitung	P	793,279	300	1.20	316	70,565	606,964	20,576	9	77
Österreich[c]	P	561,497	245	2.90	263	6,171	23,589	3,882	1	4
Kleine Zeitung	P	281,010	300	1.20	307	4,799	269,675	25,935	2	96
Kurier	P	145,560	300	1.75	410	12,742	95,764	5,863	9	66
OÖ Nachrichten	P	127,139	300	1.88	315	2,524	93,602	5,410	2	74
Tiroler Tageszeitung	P	91,045	300	1.77	378	1,402	74,206	1,381	2	82
Salzburger Nachrichten	P	75,936	300	2.27	378	2,086	65,124	9,043	3	86
Die Presse	P	70,884	299	2.30	461	2,816	58,077	12,266	4	82
Der Standard	P	70,234	300	2.60	498	2,470	50,858	7,067	4	72
Vorarlberger Nachrichten	P	56,914	300	2.00	395	610	54,285	6,553	1	95
Neue Vorarlberger TZ	P	11,032	250	1.50	337	125	4,512	203	1	41
Wiener Zeitung[d]	P	–	–	–	–	–	–	–	–	–
OÖ Volksblatt[d]	P	–	–	–	–	–	–	–	–	–
Heute	F	568,769	250							
Tiroler Tageszeitung Kompakt	F	12,388	248							

Comments: P = paid-for daily newspapers; F = free-of-charge daily newspapers

[a] Calculated average price per copy
[b] Including e-paper
[c] Most copies, but not all, are distributed for free; no data for first semester 2018, data based on the year before (ÖAK, 2018)
[d] These newspapers do not disclose their figures

Source: ÖAK, 2019: 14–35

In 2018, 98 per cent of all Austrian households were equipped with television, 37 per cent with an Internet-connected television device or smart-TV (ORF Medienforschung, 2020a). In all, 186 free television channels are currently licensed in Austria: five of them delivered by the public service provider ORF and three of them running under a non-commercial licence (RTR, 2020b; Mavise, 2020). The switch-over to digital terrestrial broadcasting was completed in 2010 (Grünangerl & Trappel, 2011). Until now, only 5 per cent of all television households exclusively use digital terrestrial programmes; 56 per cent are equipped with digital satellite devices and 39 per cent with digital cable devices (ORF Medienforschung, 2020d). In total, of 124 radio licences registered in the Austrian radio market, 12 are supplied by the public service provider ORF and 14 under a non-commercial licence (RTR, 2020a). The availability of radio channels differs significantly on a regional level.

In 2010, ORF was the only platform provider for on-demand television and radio content available online. Until 2020, all national private channels and

non-commercial television channels developed their own live-streaming and online archive services. In addition, some news providers from other media sectors, such as print or online, developed online video formats (e.g., krone.tv and oe24.tv) as part of their multimedia strategy.

Despite geographical barriers caused by Austria's topography, Internet availability is high and increasing: as of 2019, Internet connection was technically available to 90 per cent of the Austrian population, and 74 per cent used it almost daily, compared with only 2 per cent of non-Internet-users (ORF Medienforschung, 2020a; ORF Medienforschung, 2020b). Moreover, in 2019, about 72 per cent of Austrian households were equipped with fixed broadband connections (digital subscriber line, cable, optic fibre) and 68 per cent with mobile broadband connections (Statistik Austria, 2020). The distribution differs regionally, still on a high level, between the lowest share in Carinthia (84%) and the highest in Vienna (90%) and Vorarlberg (91%) (Eurostat Statistical Yearbook, 2019).

(F2) Patterns of news media use (consumption of news) 2 POINTS

IN 2011
2 POINTS

Newspapers and public service television remain the prime sources of information concerning political issues. Among the younger population, the digital Internet platforms increase their news relevance. Overall, the interest in news is high, but gaps are widening between soft and hard news followers.

News is generally attractive to Austrians. According to the *Reuters Digital News Report*, about 63.6 per cent of the Austrian population are extremely or very interested in news. News interest shows some degree of variation across genders, with 67.8 per cent of men and 59.5 per cent of women extremely or very interested. It shows an increase with age, but more than half of those aged 18–24 consider themselves as being highly interested in news (Gadringer et al., 2019: 30ff.).

As interested as they are in news, Austrians showed they value traditional legacies in communication modes. No less than 81.7 per cent of the population collectively considered television (31%), printed newspapers (18.8%), or radio (11.9%) as their main source of news. Only 10.5 per cent reported social media as their main news source. Compared to all the other countries in the *Reuters Digital News Report*, Austria stood out as being loyal to news traditions on the whole. A closer look, however, indicates some generational gaps. 18–24-year-olds show a reverse picture: for 36 per cent, the main news source is social media, with online newspaper apps ranking second (13%) and television only third (10.6%).

These news preferences are also reflected in national data for the various news outlets. Over the last decade, considerable shifts in media consumption have been observed (see Table 2).

Table 2 *Average daily reach of different media types, 2009 and 2019 compared*

	2009 total reach (mil.)	2019 total reach (mil.)	2009 daily reach (%)	2019 daily reach (%)	2009 avail-ability (%)	2019 avail-ability (%)	2009 avg. use (min. per day)	2019 avg. use (min. per day)
Newspapers	5.29	4.55	75.0	60.7	100	100	30	–
Television	4.53	4.99	62.6	66.4	98	98	156	196
Radio	6.40	6.06	81.7	77.3	98	98	199	201
Internet daily	3.33	6.22	64.0	83.0	74	88	50	–

Source: AGTT, 2020; RMS, 2020; AIM, 2020; Arbeitsgemeinschaft Media Analyse, 2020; Arbeitsgemeinschaft Media-Analysen, 2008, 2019a; RTR, 2009a: 123

Newspapers have lost reach in both absolute and relative terms. In 2009, some 75 per cent of the population were reading a daily newspaper. Ten years on, only 60.7 per cent appear to maintain that habit. This represents a reduction of about 750,000 readers. Interestingly, this decline in newspaper readership is not distributed evenly among various newspaper titles. While most of the quality newspapers have widened their reach, albeit marginally, the popular press has lost a considerable quantum of its readers. The market dominant *Kronenzeitung* reached 40.4 per cent of the population in 2009, close to its all-time high five years earlier (2005: 44.9%). Ten years later, *Kronenzeitung* is still the largest print newspaper in Austria, but 27.2 per cent was the lowest figure in its recent subscription history. The gap in numbers between the two years can partly be explained by the launch of the yellow-paper style daily free-sheet *Heute* in 2004 and its steady increase in reach. While stagnant in reach for its first decade, in 2019, *Heute* reached 12.2 per cent of the Austrian population. These trends unveil a polarisation among readers, with a strong element of boulevard press on the one hand, and a small but growing section of the population reaching out for quality newspapers, offline or online, on the other (Media Analyse, 2020).

Television has expanded its reach in the last decade, from 62.6 per cent to 66.4 per cent. This seems significant at first glance, but when taking all online streaming services into consideration, linear television has retained its audiences surprisingly well. Credit for this positive development goes to the market-dominating public service broadcaster ORF, which expanded its services from two channels in 2009 to four in 2019. These two main ORF channels are fundamental to its success with audiences and continued popularity in Austria,

with a combined daily reach of 49.8 per cent in 2009 and 48.1 per cent in 2019. Private-commercial television has slowly expanded its reach and market share, but remains insignificant compared to ORF. The most popular private channel, ATV, reached a market share of some 3.5 per cent in 2019, compared to 28.9 per cent for ORF's two main channels (AGTT, 2020).

Radio remains popular in Austria, with more than six million people listening on a regular basis in 2019. This represents a daily reach of about 77.3 per cent, dropping from 81.7 per cent over the last ten years. On average, people spent more than 200 minutes listening to radio every day, unchanged over this decade. Again, ORF radio channels lead the market (combined market share 2019: 74%; 2009: 77%), with private-commercial radio channels lagging behind (combined market share 2019: 25%, 2009: 21%) (RMS, 2020).

Finally, the Internet has significantly expanded over the past decade, reaching more people on a regular basis than any other media category. Approximately 6.2 million people use the Internet, nearly doubling from 3.3 million in 2009. Although statistically not clearly distinct from online newspapers, streaming television, and radio podcasts, nearly 83 per cent of the population use the Internet regularly. This is up from 64 per cent in 2009. Once again, Internet services provided by ORF are the most popular in Austria, followed by websites operated by most popular newspapers (AIM, 2020).

Overall, news media is widely used in Austria by all segments of society. However, a widening gap is appearing between those following serious news on quality channels, such as newspapers, television newscasts, and websites thereof, and those watching the news online, who prefer short-form news pieces or even just headlines, or soft news provided by free-sheets online and offline.

(F3) Diversity of news sources

3 POINTS

IN 2011 2 POINTS

Editors-in-chief and journalists emphasised the predominant role of journalistic research over news agency and public relations material. National and international collaboration is increasing.

The national news agency Austria Presse Agentur (APA) remains an important source in the day-to-day business of journalism. It is jointly owned by twelve Austrian newspaper publishers and the public service broadcaster ORF (APA, 2020). Ten years ago, ownership was slightly wider, with 15 newspapers and ORF. While all daily newspaper publishers are trustees of APA – with the notable exception of *Kronenzeitung* – its operations have diversified beyond news business in recent years.

Most interviewees in the journalistic sphere acknowledged the importance of news agencies in their working processes, where different news agencies (APA,

dpa, Reuters, etc.) are integral. Nevertheless, to some respondents, news agencies were seen as diminishing in importance in their personal work and used as secondary sources, rather than backbone or priority sources. Nonetheless, some smaller online media used news agencies as main sources, thereby increasing the agencies' visibility.

Concerning public relations material, respondents unanimously rejected any significant influence of it on their routine work. The amount of such material, they said, is increasing, but only a small proportion found its way into actual coverage. However, in rare cases, such materials have triggered further investigations by journalists.

Content exchange with partners and other forms of media was reported as an exception, rather than the rule, for leading Austrian news media. Although international journalism networks have been established over the past years (such as the International Consortium of Investigative Journalists), and some newspapers and ORF occasionally collaborated with other forms of media, such exchanges were of minor importance. It occasionally crystallised around larger investigative stories, such as that of the *Panama Papers*. The public broadcaster ORF typically participates in a network organised by the European Broadcasting Union, often with partner broadcasters from Scandinavia. Nonetheless, compared with 2009, reservations against cooperation with competing or neighbouring media appeared to be dissipated. While such cooperation has levelling effects for the audience when national media are involved, it may increase diversity of sources when international networks are established.

(F4) Internal rules for practice of newsroom democracy 1 POINT

In 2011
1 POINT

Newsroom democracy is established by editorial statutes, which are common in Austrian newsrooms. But journalists have limited influence on decisions about hiring the editor-in-chief.

The Austrian Media Act allows media organisations to establish editorial statutes (Mediengesetz, 2021: para. 5); stricter rules apply to the public service broadcaster. The law (ORF-Gesetz, 2021: para. 33) requires editorial statutes, which are in place and required to be published online (ORF, 2002).

In 2008, about 61 per cent of Austrian journalists worked in media organisations that provide statutes (Kaltenbrunner et al., 2008: 64). A decade later, in 2019, this percentage increased to 65 per cent (Kaltenbrunner et al., 2020: 200). Several leading news media in our sample did not have such statutes.

According to our respondents, democratic practices in newsrooms are less common at the local level, where owners appoint editors-in-chief without the participation of the journalistic staff council, as it was a decade ago (Grünangerl & Trappel, 2011). At the national level, this important staff decision is also

taken by the owners, but only after intensive internal hearings including newsroom staff.

There are a few exceptions to such a rule. Some newspapers have established rules on democratic participation of the newsroom council, especially regarding appointment of the editor-in-chief. The newsroom assemblies of *Die Presse* and *Profil*, for example, can reject the editor's proposal for a new editor-in-chief with a two-thirds majority (Kurier, 2011; Die Presse, 1974: para. 7). In fact, such rejections have already occurred in both newspapers. Nevertheless, opportunities to make autonomous proposals are few, and participation in other management or staff decisions, or in framing future formal rights, are also relatively rare. This also has remained the same over the past decade (Grünangerl & Trappel, 2011).

As far as ORF is concerned, by law, all leading positions have to be publicly announced, and staff-appointment decisions are largely transparent. Nevertheless, influence of the newsroom council and its representatives is still limited to an advisory function (Grünangerl & Trappel, 2011; ORF-Gesetz, 2021: para. 33; ORF, 2002: para. 5). Participation rights concerning changes in programme schemes and journalistic content exist; however, there is no participation in management or supervisory boards. According to our respondents, journalists appeared to be quite aware of their participation rights and practiced them seriously, as they did a decade ago (Grünangerl & Trappel, 2011). Before being appointed by the ORF Council, candidates for the position of editor-in-chief are required to present themselves in hearings to newsroom journalists.

(F5) Company rules against *internal* influence on newsroom/editorial staff

3 POINTS
IN 2011
2 POINTS

The separation of newsrooms from management is formally practised by all media organisations in this media sample and can be interpreted as common in the Austrian media system.

Leading Austrian news media houses strictly separate the newsroom from both the ownership and the advertising and commercial departments.

With regard to ownership, newspapers separate their newsrooms from owners, although, in most cases, there are no legally binding rules in place. Editors-in-chief confirmed that owners rarely visit the newsroom and never intervene in editorial matters. This also applies to public service radio and television, where newsroom journalists strictly reject interventions by the board of trustees. The few cases of interventions in newscasts by board members that are retained in collective memory were immediately made public and did not continue.

With regard to the separation of newsrooms from advertising departments, one newspaper (*Salzburger Nachrichten*) pointed to the fact that both departments are even physically separated, operating in different wings of the (same) building. All our respondents confirmed this strict separation with no contact, let alone interventions.

Nonetheless, some news sections are prone to influence and collaboration between journalists and advertising departments, such as travel, leisure or holiday, and mobility (cars) sections. Some newspapers have drawn a demarcation line by employing staff just for these sections, not working in the newsrooms but exclusively for the commercial section. Other newspapers occasionally mix staff, working for both sides. However, this, too, is rare and not general practice.

(F6) Company rules against *external* influence on newsroom/editorial staff

1 POINT
IN 2011
2 POINTS

Editors-in-chief strictly denied the direct influence of external parties on newsroom work and content, although such attempts were occasionally reported. The amount of public advertising compromises editorial freedom for some leading news media.

All leading news media in Austria are financed through a combination of sales or licence fee income on the one hand, and advertising and sponsorship on the other. The only exception is ORF's radio channel, Ö1, dedicated to culture, information, and classical music, which is free of advertising. ORF's other radio channels, all television channels, and its online media are partly financed by advertising.

Advertising in Austria is a black box to media economists. Media companies do not disclose their advertising income, and there is no database with how much money companies invest in advertising. No information is disclosed by global platforms such as Google and Facebook on their advertising business in Austria. Therefore, statistical evidence that can help to cross-verify the answers of our respondents is lacking.

All editors-in-chief and all journalists categorically rejected any influence of advertisers and other external agents on their editorial content. Their advertising clients are diverse, with no undue influence by any of them. Some respondents recall singular cases of advertisers blackmailing media with the withdrawal of advertising, or even boycotts; however, these incidents were rare and occurred several years ago.

Although no data has been disclosed for commercial advertisers, some evidence regarding advertising by public institutions is available. In 2011, the Austrian parliament passed a law on media transparency, obliging all public

institutions and companies governed by the state to disclose quarterly all advertisements, including beneficiaries. This dataset is publicly available online at the website of the telecommunication and broadcasting authority Kommunikationsbehörde Austria (KommAustria) and Rundfunk und Telekom Regulierungs-GmbH (RTR).[1] In 2019, public companies, municipalities, ministries, labour and employers' associations, public transport, energy supply companies, tourism marketers, universities, and so forth, spent a total of EUR 178 million for media advertising purposes. Table 3 shows the main beneficiary media.

Table 3 *Beneficiary media from advertising spending by public institutions, 2019*

Media	EUR
Kronenzeitung (incl. Kronehit, Krone.at)	20,362,311
ORF (TV, radio, ORF.at)	19,853,376
Heute (incl. Heute.at)	12,024,529
Österreich (incl. oe24.at)	10,528,713
Kurier (incl. Kurier.at)	7,623,999
Google (.com and .at)	5,903,216
Standard (incl. derStandard.at)	5,824,121
Kleine Zeitung (incl. Kleinezeitung.at)	5,742,767
District newspapers	5,461,162
Presse (incl. diePresse.at)	5,203,473
Vorarlberger Nachrichten (incl. VOL.at)	3,321,596
OÖN (incl. nachrichten.at)	3,255,378
Tiroler Tageszeitung (incl. tt.com)	3,081,223
Facebook (.com and .at)	2,488,305
Salzburger Nachrichten (incl. sn.at)	2,373,180
Total (all media)	178,027,676

Source: RTR, 2019b

Table 3 shows that advertising money is far from being spent equally across news media. There is a strong bias favouring popular media that has high reach among Austrians. *Kronenzeitung*, *Heute*, and Österreich are boulevard-style titles with sympathies for populist movements. The public service broadcaster ORF is by far the largest medium in Austria, with its operations being determined by law (ORF Gesetz). Regional newspapers profit much less from public advertising. The regional newspaper in our research sample, *Salzburger Nachrichten*, received a sixth of the amount that *Kronenzeitung* did. Public institutions also spent almost EUR 6 million for advertising in Google, and another EUR 2.3 million in Facebook.

For Austrian media, such advertising bookings are essential and economically important. This is exemplified by how the public service broadcaster ORF is obligated to disclose its annual accounts. In 2018, 63.8 per cent of ORF's income was generated by licence fees and 23 per cent by advertising (the rest included miscellaneous revenues from programme sales and other income) (ORF, 2019). The 23 per cent advertising income was equivalent to EUR 229.6 million. Thus, public advertising represents 8.6 per cent of the entire advertising income. It can safely be assumed that public advertising is relatively more important for the revenue stream of considerably smaller private media.

Seen from a management perspective, in such media houses, public advertising constitutes a main economic pillar and should not be jeopardised. Positive and less critical coverage is conducive to this end. A closer look at the public institutions and the amount spent for beneficiary media might further illustrate this delicate relationship (see Table 4).

Table 4 *Public advertising by beneficiary media, 2019 (thousand EUR, selected institutions)*

	Kronen-zeitung	Österreich	Heute	ORF	Standard	Salzburger Nachrichten
Prime Minister	410	208	41	0	80	47
Ministry of Digitalisation and Economics	335	278	625	40	78	35
Ministry of Finance	1,329	854	141	0	96	193
Ministry of Interior	364	364	529	0	6	29
Ministry of Environment, Energy, Technology	412	462	772	0	0	32
Municipality of Vienna	2,879	2,007	3,418	433	1,559	–
Province Lower Austria	457	406	160	210	41	–
Province of Salzburg	–	–	–	–	–	84
Employers' Association	1,397	474	511	2,559	217	304
Labour Association	1,063	370	296	1,009	37	145
Public service broadcaster ORF	1,093	1,526	527	–	465	0
Austrian Railways ÖBB	394	616	293	1,029	51	150
Verbund (national energy provider)	167	117	556	508	277	33
Salzburg AG (regional energy provider)	–	–	–	–	–	281
Total (all public institutions)	20,362	10,529	12,025	19,853	5,824	2,373

Comments: Kronenzeitung (incl. *Kronehit, Krone.at), Österreich* (incl. *Oe.24*), *ORF* (incl. *TV, radio, orf.at*), *Heute* (incl. *Heute.at*), *Standard* (incl. *derstandard.at*), *Salzburger Nachrichten* (incl. *Salzburger Fenster, sn.at*)

Source: RTR, 2019b

The Ministry of Finance, for example, spent more than EUR 1.3 million for advertisements in *Kronenzeitung*, but just EUR 69,000 for the quality daily newspaper *Der Standard*. Still more remarkable is the overall amount spent by the municipality of Vienna for the three boulevard dailies *Kronenzeitung*, *Österreich*, and *Heute*. Together, they received advertising orders of EUR 8.3 million, and *Der Standard* received another EUR 1.5 million. Overall, advertisers of this scale and order can – and, in all probability do – expect positive coverage in return.

Overall, the implications of this advertising-based media support compromise the beneficiaries' editorial independence. This might well be relational to the proportion of this support in their entire revenue.

(F7) Procedures on news selection and news processing 1 POINT

IN 2011
1 POINT

Institutionalised means of criticising journalistic working habits only exist in a few newsrooms and are not regularly practised.

Stylebooks were rare in Austrian newsrooms a decade ago (Grünangerl & Trappel, 2011) – and this has not changed. Editors-in-chief still rely more on the individual professionalism of their journalistic staff than on formalised rules. They emphasised the implicitness of such criteria in the journalistic working process. Discussions on news values and news selection are occasion-driven and part of the journalistic routines (Grünangerl & Trappel, 2011). Such routines typically foresee that up to five persons read and edit stories before they are published. All editors-in-chief emphasised that news items would not be published without being checked by at least two people, although they admitted that this was not always ensured rigorously under time pressure. ORF has more institutionalised and complex forms of news selection, as a check and re-check system has been implemented. By law, but also enshrined in the journalists' statute, ORF journalists are free and independent in what they report, and their work enjoys integrity safeguard mechanisms (journalists do not have to accept editing by others) (ORF, 2002).

(F8) Rules and practices on internal gender equality 2 POINTS

Employment conditions among male and female journalists are formally equal in terms of conditions and pay.

Much in line with the findings of the study by the International Women's Media Foundation (IWMF, 2011) for Western Europe, Austria's journalism staff is almost balanced in terms of gender: 53 per cent are men and 47 per cent are

women. However, again in line with the International Women's Media Foundation report, there is a glass ceiling regarding leading positions among journalists: 14 per cent of male journalists work in leading positions, compared with 8 per cent of female journalists. Furthermore, on average, female journalists earn less than their male counterparts do. 43 per cent of women earn less than EUR 3,000 per month, but only 27 per cent of men do. Such disparities are even more pronounced within the bracket of high-earning journalists (more than EUR 5,000 per month). Only 16 per cent of women belong to this group, but double that proportion (32%) of men do (Kaltenbrunner et al., 2020: 239).

All respondents in the leading news media sample observed a clear and lasting trend of ironing out gender inequalities and reported progress for their own media company. Gender equality applied both to the current numbers of employment in newsrooms and to newly hired journalists (with one exception, in which two-thirds of journalistic staff was male). Even in leading positions, many more women have been appointed in recent years. In some news media, informal or implicit rules positively discriminate against women when leading positions are filled, up to the time when equal status is achieved. To this end, there is even a binding legal provision in place for ORF (ORF-Gesetz, 2021: para. 30d).

Equal pay is strictly applied for all journalistic labour contracts, according to respondents. However, the difference in the above reported earning statistics might be explained by the fact that many more women (45%) are working part-time (thus earning less) than men (20% part-timers) (Kaltenbrunner et al., 2020: 247).

Within ORF, the largest employer of journalists in Austria, specific rules apply with regard to gender equality, based on legal provisions (ORF-Gesetz, 2021: para. 30a–p). Since 2012, a gender balance plan is in force and revised every two years. It secures equal employment conditions and aims to eradicate existing imbalances at all employment levels. In 2013, the European Institute for Gender Equality has distinguished this plan as "good practice" (EIGE, 2013). The plan's implementation has enabled ORF to take significant steps towards equality (Kirchhoff & Prandner, 2017).

(F9) Gender equality in media content 1 POINT

There is growing sensitivity among journalists for gender equality in media content, but no formal rules apply. Stereotypes prevail in visual gender representation.

Gender equality is much more a private and personal concern among journalists, rather than being codified or recognised explicitly. Respondents acknowledged the importance of the issue, but admitted that the respect for gender equality in media content is limited. In daily practice, timeliness often trumped gender equality when searching for experts.

Women are acutely underrepresented as subjects in Austrian news coverage. Empirical research has confirmed such an inequality repeatedly, over the decades and across various media genres (Thiele, 2019). In their country-level study on news and gender within the framework of the Global Media Monitoring Project, Kirchhoff and Prandner (2015) identified women's representation in the news as weak. Only 21 per cent of news subjects, reporters, and presenters in the traditional media were female, and even less in Internet-based media. The presence of women as news subjects was high in sections about celebrities, art, and media, and low in economics, politics, and government. The authors of this snapshot content analysis on a single day in March 2015 concluded:

> There are significant gender gaps in both the traditional media outlets and the internet. The representation of women in economy (14%) and politics or government stories (18%) is very low compared to the news stories that deal with lifestyle (44%), crime and violence (25%) and social or legal issues (20%). (Kirchhoff & Prandner, 2015: 17)

Another content analysis (Pernegger, 2020) confirms these findings. While women's representation in politics is stronger than ever (first female prime minister in 2019; first government with equal gender participation among ministers 2019; 39% female members of the Austrian parliament in 2020), popular print media (*Kronenzeitung*, *Österreich*, *Heute*) in particular continued to neglect women's policy issues even as late as 2019. Regarding gender representation in published pictures, the gender gap is striking (only 31% are women); moreover, such pictures reinforce traditional gender stereotypes.

(F10) Misinformation and digital platforms (alias social media) 1 POINT

Misinformation on digital platforms is of minor relevance and importance so far, and defence mechanisms are not yet developed.

Respondents of leading news media in Austria, among them public service broadcaster ORF, recognised the potential harm caused by misinformation on digital platforms, but trusted their journalistic skills to identify fake news. They all applied the basic journalistic principle of "check, re-check, double-check" to all stories and believed that fake news could be identified this way. When in doubt, leading news media houses trusted credible sources, such as news agencies, and hoped that these business-to-business services applied strict verification procedures. None of the news media in our sample, including even ORF, collaborated with external fact-checking institutions or ran an in-house verification department. Overall, respondents confirmed that fake news and

deep fakes were not an urgent and pressing problem in Austria at the present time, making investments in verification unjustified as yet.

(F11) Protection of journalists against (online) harassment 3 POINTS

Journalists generally rely on support and protection by their employers in case of harassment.

Harassment rarely happens in Austria, online or offline. Over the last decade, few cases of harassment or online shitstorms have occurred, according to our respondents of leading news media. Thus, media companies generally had no special legal division in place to protect their journalists. However, if such insults did happen, media companies employed specialised lawyers to defend the rights of journalists and prevent harm to journalists on those occasions. This applied to both online and offline media, and no specific safeguards or provisions were observed to be in place for online cases. In the case of ORF, the management has the obligation to defend its journalists in the case of any assault (ORF, 2002: para. 4).

The general level of support was considered fair and sufficient by our journalist respondents.

Dimension: Equality / Interest Mediation (E)

(E1) Media ownership concentration national level 1 POINT

IN 2011
1 POINT

Ownership concentration on a national level remains remarkably high, as a few big media companies divide the market among them.

The Austrian Cartel Act provides special regulation for media mergers being notifiable to the Federal Competition Authority if companies exceeded revenue limits (Kartellgesetz, 2021: para. 8).[2] Nevertheless, especially the Austrian market has continually seen extremely high press concentration, accumulated by several waves of concentration until the mid-1990s (Steinmaurer, 2009: 505; Trappel, 2007: 64).

Even after the implementation of stricter competition rules with the establishment of competition authority in 2002, rejections of media mergers by Austrian authorities have been rare. Economic struggles and crises within the overall media sector have gradually contributed to this problem over the past ten years.

Table 5 *Audience reach and circulation of Austrian dailies (paid-for and free-of-charge), 2018*

	Type	Associated media company	Audience reach	Audience reach (%)*	Circ.	Market share (%)
Kronenzeitung	national	Mediaprint	2,035,000	27.2	793,279	27.7
Heute	regional/free	AHVV-Verlags GmbH	868,000	11.6	568,769	19.8
Österreich	national/partly free	Verlagsgruppe News	518,000	6.9	561,497	19.6
Kleine Zeitung	regional	Styria Media Group	735,000	9.8	281,010	9.8
Kurier	national	Mediaprint	556,000	7.4	145,560	5.1
OÖ Nachrichten	regional	Wimmer Verlag	375,000	5.0	127,139	4.4
Tiroler Tageszeitung	regional	Moser Holding	276,000	3.7	91,045	3.2
Salzburger Nachrichten	regional	Salzburger Nachrichten	252,000	3.4	75,936	2.6
Die Presse	national	Styria Media Group	346,000	4.6	70,884	2.5
Der Standard	national	Standard	583,000	7.8	70,234	2.5
Vorarlberger Nachrichten	regional	Vorarlberger Medienhaus	160,000	2.1	56,914	2.0
Tiroler Tageszeitung Kompakt	regional/free	Moser Holding	11,000	0.1	12,388	0.4
Neue Vorarlberger Tageszeitung	regional	Vorarlberger Medienhaus	37,000	0.5	11,032	0.4
Total (national)			4,654,000	–	2,865,687	–
Total (population 14+)			7,473,000	–	–	–
Three top media companies (CR 3) (titles)			–	–	–	67.1
CR 3 (companies)			–	–	–	76.6

*readers per edition in per cent of population

Source: Arbeitsgemeinschaft Media-Analysen, 2019a; ÖAK, 2019: 14–35

Circulation of all Austrian newspapers decreased significantly over the past ten years (e.g., the market leader *Kronenzeitung* from 948,615 in 2008 to 793,279 in 2018). *Kronenzeitung* is still dominant on the Austrian print market; however, reaching only 27.2 per cent of the population (compared to 41.9% in 2008) and with a market share of 27.7 per cent (2008: 37.4%), total circulation has been largely set back even for this hugely successful newspaper (Arbeitsgemeinschaft Media-Analysen, 2019a; Arbeitsgemeinschaft Media-Analysen, 2008: 67). The three largest newspapers – all boulevard titles – reach a combined market share of 67.1 per cent (2008: 62.3%), demonstrating a highly concentrated national newspaper market. The nationwide quality newspaper with the highest circulation, *Der Standard*, reaches 7.8 per cent (2008: 5.5%) of the Austrian population with a circulation of 70,234 (2008: 117,131). In fact, four big private media companies (Styria Media Group, Mediaprint, Verlagsgruppe News, and AHVV Verlags-GmbH) dominate the Austrian press market. The calculated circulation market share for the three top media companies (CR3) on

the national newspaper market is 76.6 per cent (2008: 77.5%) and, therefore, remains reasonably high and secure.

In terms of ownership, over the past ten years, the Austrian media market has widely sustained its highly concentrated and non-transparent nature, due to complex ownership structures including private foundations and holding companies with few changes. Hence, the big national boulevard-style newspapers *Kronenzeitung* and *Kurier* are still associated with Mediaprint, sharing technical production, distribution, and advertising. Major changes occurred in 2018, when the German Funke Gruppe sold 49.5 per cent of their shares to the Signa Holding conglomerate, based in the Austrian real estate market (derstandard.at, 2018).

Styria Media Group, which used to be the second largest Austrian media company in terms of turnover after the public broadcaster for a long time (Melischek et al., 2005: 247–251) underwent consolidation over the past ten years. This included restructuring the newsrooms of *Die Presse*, as well as closing the daily newspaper on economic affairs *Wirtschaftsblatt* in 2016. Still, Styria, whose owner (Katholischer Pressverein) is associated with the Catholic Church, is an active market player in Austrian newspapers (*Kleine Zeitung*, *Die Presse*), regional print media (*Radio Marketing Service*, *Bezirksblätter*), radio (*Antenne Kärnten, Antenne Steiermark*), magazines, as well as online media.

The magazine market in particular saw changes over the past ten years. With Red Bull, a new financially powerful player entering the market (also the television market), the leading player on the magazine market so far, Verlagsgruppe News, saw restructuring in terms of ownership. In 2000, this media company was part of a very controversial decision on media mergers in Austria, allowing an exchange of corporate shares between the magazine section of Kurier Verlag and Verlagsgruppe News. This led to a quasi-monopoly situation for Verlagsgruppe News in the magazine market, as the competing political weekly magazines *Profil*[3] and *Format* were also edited by Verlagsgruppe News at the time. Moreover, Verlagsgruppe News was also cooperating with Mediaprint. Several times, criticisms were raised about how stricter rules on media mergers and media concentration in Austria were established too late to effectively prevent a concentrated media market (Melischek et al., 2005: 248; Steinmaurer, 2009: 508). As of 2020, the Austrian bank Raiffeisen Zentralbank is a minority owner of Verlagsgruppe News (together with *Kurier* and Mediengruppe *Österreich*, which belongs to the Fellner family). The German publisher Gruner + Jahr (Bertelsmann) sold its majority to the Austrian media manager Horst Pirker in 2016 (Fidler, 2016). On the whole, then, the Austrian print media landscape continues to remain highly concentrated: on the one hand, restructuring processes led to closures of media titles; on the other, certain German publishers who were active in the Austrian media market sold their shares. Furthermore, new financially strong players entered the (television, magazine, print) market from non-media related sectors.

The legal framework for the implementation of private broadcasting in Austria was only established after a decision of the European Court of Human Rights asserted that the broadcasting monopoly would infringe freedom of speech (Steinmaurer, 2009: 512). As a consequence, the first two local private radio broadcasters were founded in 1995. The first national terrestrial television licence was granted to the former Vienna-based cable television broadcaster ATV in 2003 (Steinmaurer, 2009: 512). ORF always had private competitors (particularly in the television sector) since the mid-1980s, due to the availability of cable and satellite programmes from Germany. German media companies also played a significant role in the private Austrian television market from the start. In 2020, PULS 4, owned by German ProSiebenSat1 Media AG, has content arrangements with other German channels affiliated with its owner. ATV (channels ATV and ATV II) was partly owned by the German media company Tele München Gruppe, which sold its shares to ProSiebenSat1 Media AG in 2017, leaving only two competitors of Austria-based private television channels on the market. The second of these is the energy drink producer Red Bull, which entered the Austrian television market via its media holding Red Bull Media House GmbH in 2009. It launched the latest private national television channel: *ServusTV*. The media holding is also active in the Austrian print sector with several monthly magazines (*Red Bulletin*, *Servus in Stadt und Land*, *Terra Mater*, etc.).

As a consequence of such late liberalisation, the television market is still dominated by the public service broadcaster ORF, even though its market share is gradually but steadily declining. In 2019, ORF 2 had a market share of 19.8 per cent (2008: 25.1%), and the rather entertainment-orientated public service channel ORF 1 had a market share of 9.1 per cent (2008: 16.8%). Together, they reached 3.619 million Austrians on a daily basis (48.1%, compared to 51.8% in 2008) (ORF Medienforschung, 2020c). The largest German private television channels (RTL, VOX, Pro7) present in the television sector in Austria held market shares that varied from 3.4 to 4 per cent; the Austrian private channels also varied between 3.5 per cent (ATV), 3.4 per cent (PULS 4), and 3 per cent (ServusTV). The top three television channels accumulated a market share of only 33.1 per cent (2008: 49.2%) and represent two public broadcasters (two channels by Austrian ORF and German ZDF). The CR3 for the top three television companies on the national television market remains higher – ORF, RTL Group, and ProsiebenSat1Media hold a market share of 64.5 per cent (2008: 69.7%) (see Table 6).

The radio market too, has been dominated by public service channels. Besides the three nationwide available radio channels operated by ORF (*Ö1*, *Ö3*, and FM4), only *Kronehit* (owned by *Kronenzeitung* and *Kurier*) operated the nationwide private licence for a long time; Radio Austria started as the second nationwide private channel in October 2019. In 2019, *Kronehit*

Table 6 *Market share of national television channels, 2019*

	Type	Associated media company	Market share (%)
ORF 2	Public service broadcaster (AUT)	ORF	19.8
ORF 1	Public service broadcaster (AUT)	ORF	9.1
ZDF	Public service broadcaster (GER)	ZDF	4.2
RTL	Private (GER)	RTL Group	4.0
VOX	Private (GER)	RTL Group	3.6
ATV	Private (AUT)	ProSiebenSat1 Media SE	3.5
Pro 7	Private (GER)	ProSiebenSat1 Media SE	3.4
PULS 4	Private (GER)	ProSiebenSat1 Media AG	3.4
SAT 1	Private (GER)	ProSiebenSat1 Media SE	3.3
ARD	Public service broadcaster (GER)	ARD	3.0
ServusTV	Private (AUT)	Red Bull Media	3.0
Kabel 1	Private (GER)	ProSiebenSat1 Media SE	2.3
RTL II	Private (GER)	RTL Group	1.9
Sat.1 Gold	Private (GER)	ProSiebenSat1 Media SE	1.8
3sat	PSB (GER)	ARD, ZDF, ORF, SRG	1.5
RTL NITRO	Private (GER)	RTL Group	1.3
ATV II	Private (AUT)	ProSiebenSat1 Media AG	1.1
Super RTL	Private (GER)	RTL Group	1.1
SIXX	Private (GER)	ProSiebenSat1 Media SE	1.0
RTL Plus	Private (GER)	RTL Group	1.0
7MAXX	Private (GER)	ProSiebenSat1 Media SE	0.7
ntv	Private (GER)	RTL Group	0.7
Dmax	Private (USA)	Discovery Inc.	0.7
TLC	Private (USA)	Discovery Inc.	0.6
Comedy Central	Private (USA)	Viacom	0.3
n24 doku	Private (GER)	Welt N24 GmbH	0.3
sport1	Private (GER)	Sport1 Medien AG	0.3
Nickelodeon	Private (USA)	Viacom	0.2
Others			22.9
Total			100.0
CR 3 (channels)			33.1
CR 3 (companies)			64.5

Comments: Country of origin in parentheses: AUT = Austria, GER = Germany, USA = United States

Source: AGTT, 2020

reached 10.7 per cent (2008: 5.9%) of the population and had a market share of 7 per cent (2008: 4%). Nevertheless, the Austrian radio landscape is mainly characterised by a variety of regional and local channels, as it was ten years ago (Grünangerl & Trappel, 2011; see also Indicator E2 – Media ownership concentration regional level; and Table 7). The public service mainstream programme *Ö3* leads the market with a share of 33 per cent (same as in 2008); this reached 33.7 per cent of the population. The regional public service radio programmes, locally produced by nine regional studios (*Ö2*) occupied 35 per cent of the market (2008: 37.0%), followed by the cultural program *Ö1* with 7 per cent (2008: 6%). The top three radio channels have an aggregated market share of 75 per cent (2008: 76%), and the top three radio companies have 86 per cent (2008: 81%).

The Austrian online media market has been growing remarkably over the past ten years in terms of reach. Yet, it remains subservient to traditional media companies that are also active in other media sectors – mainly newspaper, magazine, and television markets (see Table 8). The online network of the public service broadcaster ORF reaches 3.9 million people per month, which represents 52.1 per cent of the Austrian population (2008: 1.9 million). Many media companies are extant only in the online outlets of their print products (e.g., Mediaprint) and associated media offers. Others have broadened their repertoire: Styria Media Group reaches many Austrians with the online outlets of the newspapers *Kleine Zeitung* and *Die Presse* as well as their regional offers (*Regionalmedien Austria*, *meinbezirk.at*) and the online market platform *willhaben.at*. Both *heute.at* (reach 2019: 2.7 million) and the medical information platform *netdoktor.at* (reach 2019: 861,000) belong to Heute Gruppe. Mediengruppe *Österreich* not only offers the online newspaper platform *oe24-Netzwerk* (reach 2019: 2.6 million) but also the weather info website *wetter.at*. What is particularly remarkable is how the circulation of the online pioneer *derstandard.at* reached 2.5 million Austrians per month, with a quality information policy.

Table 7 *Daily reach and market share of leading national radio channels, 2019*

	Type	Associated media company	Daily reach (projection to total population)	%*	Market share (%)
Ö3	Public service broadcaster	ORF	2,640,000	33.7	33
Ö2 (regional)	Public service broadcaster	ORF	2,319,000	29.6	35
Kronehit	Private	Mediaprint	838,000	10.7	7
Ö1	Public service broadcaster	ORF	729,000	9.3	7
FM4	Public service broadcaster	ORF	251,000	3.2	2
Antenne Steiermark	Private	Antenne Stmk./Knt.	243,000	3.1	3
88.6 - so rockt das Leben	Private	Radio Eins Privatradio	235,000	3.0	2
Life Radio OÖ	Private	Life Radio	180,000	2.3	2
Radio Arabella	Private	Radio Arabella GmbH	165,000	2.1	2
Radio Austria / Antenne Salzburg / Antenne Tirol	Private	Radio Austria GmbH	141,000	1.8	2
Radio Energy	Private	NRJ Group	133,000	1.7	1
Antenne Kärnten.	Private	Antenne Stmk./Knt.	125,000	1.6	2
Antenne Vorarlberg	Private	Russmedia Verlag GmbH	94,000	1.2	1
Life Radio Tirol	Private	Life Radio	71,000	0.9	1
98,3 Superfly	Private	Superfly Radio GmbH	39,000	0.5	0
Total public			4,951,000	63.2	74
Total private (AUT)			2,217,000	28.3	25
Total private (foreign)			329,000	4.2	4
CR 3 (channels)					75
CR 3 (companies)					86

Comments: Population 10+ (national: 7,834,000; *n* = 22,141).

* daily listeners in per cent of population, sorted by daily reach

Source: RMS, 2019

Table 8 *National concentration of websites with news content, 2019 (Unique users, top 25)*

	Associated media company	Reach	% population 14 +	% total Internet users
ORF.at Network	ORF	3,957,000	52.1	60.1
willhaben (roof offer)	Styria Media Group	3,640,000	48.0	55.3
krone.at	Mediaprint	2,773,000	36.5	42.1
oe24-Netzwerk	Mediengruppe Österreich	2,632,000	34.7	40.0
derstandard.at Netzwerk	Standard	2,489,000	33.0	38.0
gmx.at	GMX	2,468,000	32.7	37.7
Kurier Online Medien	Mediaprint	2,326,000	30.6	35.3
heute.at (roof offer)	AHVV-Verlags GmbH / Heute Gruppe	2,279,000	30.0	34.6
Regionalmedien Austria Digital	Styria Media Group / Moser Holding	2,093,000	27.6	31.8
SevenOne Interactive Network	ProSiebenSat1 Media SE	2,079,000	27.4	31.5
meinbezirk.at	Styria Media Group / Moser Holding	1,997,000	26.3	30.3
kleinezeitung.at	Styria Media Group	1,919,000	25.3	29.1
VGN Digital roof offer	Verlagsgruppe News	1,810,000	23.8	27.5
Russmedia Portale	Vorarlberger Medienhaus	1,461,000	19.2	22.2
OÖ Nachrichten Online Netzwerk	Wimmer Verlag	1,367,000	18.0	20.7
nachrichten.at	Wimmer Verlag	1,357,000	17.9	20.6
wetter.at	Mediengruppe Österreich	1,337,000	17.6	20.3
shpock.com	finderly GmbH	1,151,000	15.2	17.5
Moserholding Tirol Netzwerk	Moser Holding	1,119,000	14.7	17.0
diepresse.com	Styria Media Group	1,082,000	14.3	16.4
tt.com	Moser Holding	1,077,000	14.2	16.3
Salzburger Nachrichten Online Netzwerk	Salzburger Nachrichten	1,045,000	13.8	15.9
wetter.com	Mediengruppe Österreich	1,029,000	13.6	15.6
NÖN-Netzwerk	NÖ Pressehaus	945,000	12.4	14.3
netdoktor.at	AHVV-Verlags GmbH/ Heute Gruppe	861,000	11.3	13.1
Total		6,588,000	–	–

Source: ÖWA, 2019

(E2) Media ownership concentration regional (local) level 1 POINT

In 2011
1 POINT

On a regional level, ownership concentration is remaining remarkably high. In most Austrian regions, one newspaper is dominant; the public service broadcaster still dominates the local radio market.

With regards to television, local or regional broadcasters have been insignificant for a long time in Austria. All national broadcasters are Vienna-based except for ServusTV (based in Salzburg). Non-commercial broadcasting projects have become a stable part of the spectrum over the past years; however, they tend to telecast niche programmes bound to specific local (mainly urban) areas (e.g., *FS1*, *Okto TV*).

On the contrary, the Austrian radio market has traditionally been dominated by regional channels (see Tables A1–A9 in the Appendix). Besides the national channels of the public service broadcaster ORF, only *Kronehit* (since 2003) and *Radio Austria* (since 2019) hold national licences. In all nine provinces, the national public service mainstream programme *Ö3* leads with a market share, ranging between 29 per cent (Vienna) and 39 per cent (Lower Austria). The regional public service programmes (*Ö2*) surpass private competitors, with market shares ranging from 15 per cent (Vienna) to 48 per cent (Carinthia). Several small private channels are part of trans-regional chains (*Antenne, Arabella*). Therefore, media concentration in the regional radio market varies across regions, from 56 per cent (Vienna) to 92 per cent (Carinthia) at the level of specific channels. At the company level, concentration is more severe: while the CR3 (companies) dominate 88 per cent of the market in Vienna and 86 per cent in Tyrol, they exceed 90 per cent in all other Austrian regions, peaking at 99 per cent in Carinthia and Burgenland.

High concentration has always been common for the regional structures of the Austrian newspaper market (Seethaler & Melischek, 2006: 254). With a general decline in audience reach for most newspapers in the past ten years, the problem persists. Nevertheless, daily newspapers are an important source of information to the Austrian population at a regional level: as of 2018, it varied between 57.7 per cent (in Vorarlberg) and 71.1 per cent (in Carinthia) of the local population being reached by a newspaper regularly (see Table 9). In Vienna, Styria, Carinthia, Upper Austria, and Salzburg, two comparably powerful newspapers have split the local market (one of them being the national boulevard daily *Kronenzeitung*). In Vienna and Lower Austria, the free-of-charge daily *Heute* has become the main competitor to *Kronenzeitung*. Compared to 2008, *Kurier* lost its strong position in Vienna and Tyrol, supposedly due to competition from free-of-charge papers in urban areas of these regions. Some regions such as Carinthia faced more drastic changes due to the closure of titles (*Neue Kärntner Tageszeitung*, ceased 2014). Other regions have one dominant daily newspaper (see also Table 9). *Kronenzeitung* is still market leader in two

of the nine provinces (compared to four in 2008), being second only to regional newspapers in six further provinces (compared to four in 2008), and reaching up to 46.7 per cent of the local population. Compared to data from the 2010 MDM, all major newspaper titles faced declines in audience reach. This was moderate in some regions (e.g., Burgenland, Salzburg, and Vorarlberg) and more acute in others (such as Vienna, Lower Austria, and Tyrol), even the big player *Kronenzeitung* witnessed a fall in its reach, for instance, from 520,000 in 2008 to 329,000 in 2019 in Upper Austria (Arbeitsgemeinschaft Media-Analysen, 2019b–j; Arbeitsgemeinschaft Media-Analysen, 2008:146–193).

Only in the most western region of Austria, Vorarlberg, is *Kronenzeitung* not the most significant newspaper in the local market. However, in Vorarlberg itself, the two dominant daily newspapers (*Vorarlberger Nachrichten*, *Neue Vorarlberger Tageszeitung*) are published by the same media company, which leads to an extremely concentrated local market. This company, Vorarlberger Medienhaus, not only reaches more than half of the regional population with its print products, but also dominates radio and online media at a regional level. In Tyrol, Moser Holding AG plays an important role as a regional market power. Here, *Tiroler Tageszeitung* is the leading daily newspaper, reaching 43.3 per cent of the local population. Additionally, Moser Holding AG owns the leading private radio channel (*Life Radio*) and several monthly and weekly magazines in the region.

(E3) Diversity of news formats

3 POINTS

IN 2011
3 POINTS

Austrian news media provide for a large variety of different news formats, from headline news online to long-reads in newspapers and background features on radio and television. All different categories are covered, including local, national, and international news as well as politics, economy, current affairs, culture, and sport sections.

Austria's news media provide for a large variety of news formats. This variety has increased over the last decade since 2009, notably online and in the private broadcasting sector. In particular, boulevard-style formats have increased, with online television channels being launched by daily newspapers *Kurier* (Schau TV) and *Österreich* (oe24.tv). Furthermore, the two private television channels ATV and PULS 4 (owned by the same company) have also extended their news programmes. Although this news content is popular in style, it has also added to format variations.

These programmes come in addition to quality boulevard newspapers and ORF's main television news formats, which are broadcast on ORF 2. Information formats on ORF 1 are usually shorter. ORF 2, meanwhile, provides seven different news formats throughout the day, four of them exceeding a time slot

Table 9 *Audience share of top 3 Austrian paid-for and free dailies with highest reach on regional level, 2018*

	Associated media company	Audience reach	%[a]
VIENNA			
Heute (free)	AHVV-Verlags GmbH	447,000	28.2
Kronenzeitung	Mediaprint	351,000	22.2
Österreich / oe24-Kombi (free)	Verlagsgruppe News	289,000	18.3
Population (1,584,000)		1,009,000	63.7
LOWER AUSTRIA			
Kronenzeitung	Mediaprint	435,000	30.6
Heute (free)	AHVV-Verlags GmbH	256,000	18.0
Kurier	Mediaprint	200,000	14.1
Population (1,421,000)		841,000	59.2
BURGENLAND			
Kronenzeitung	Mediaprint	102,000	40.4
Kurier	Mediaprint	41,000	16.1
Heute (free)	AHVV-Verlags GmbH	21,000	8.4
Population (253,000)		161,000	63.7
STYRIA			
Kleine Zeitung (Graz)	Styria	442,000	41.5
Kronenzeitung	Mediaprint	332,000	31.1
Der Standard	Standard	66,000	6.2
Population (1,065,000)		712,000	66.9
CARINTHIA			
Kleine Zeitung (Klagenfurt)	Styria	229,000	55.7
Kronenzeitung	Mediaprint	186,000	46.7
Der Standard	Standard	22,000	10.3
Population (483,000)		344,000	71.1
UPPER AUSTRIA			
OÖN-OÖ Nachrichten	Wimmer Verlag	40,000	27.5
Kronenzeitung	Mediaprint	329,000	26.5
Heute (free)	AHVV-Verlags GmbH	117,000	9.4
Population (1,239,000)		738,000	59.5
SALZBURG			
Salzburger Nachrichten	Salzburger Nachrichten	160,000	34.5
Kronenzeitung	Mediaprint	135,000	29.0
Der Standard	Standard	20,000	4.2
Population (466,000)		273,000	58.7
TYROL			
Kombi Tiroler Tageszeitung / Tiroler Tageszeitung Kompakt (paid / free)	Moser Holding	275,000	43.3
Kronenzeitung	Mediaprint	149,000	23.4
Der Standard	Standard	43,000	6.8
Population (635,000)		386,000	60.8
VORARLBERG			
Vorarlberger. Nachrichten	Vorarlberger Medienhaus	153,000	46.9
Neue Vorarlberger Tageszeitung	Vorarlberger Medienhaus	35,000	10.6
Der Standard	Standard	23,000	7.1
Population (327,000)		188,000	57.7

[a] readers per edition in per cent of local population

Source: Arbeitsgemeinschaft Media-Analysen, 2019b–j

of 15 minutes. A regional news format is broadcast on ORF 2 before the main evening news, delivered by the regional ORF studios. In addition, ORF 1 delivers shorter news formats five times a day, from "flash news" to "late night news". Apart from these news formats, there are also special interest magazines on political and economic topics (*Thema*, *Report*), political discussion formats (*Im Zentrum*, *Runder Tisch*), international magazines (*Welt Journal*), as well as a weekly discussion format on current affairs, inviting journalists from other media organisations to be co-interviewers (*Pressestunde*, *Hohes Haus*).

Private television channels have shorter and more sensationalist forms of news presentation. The private channel ATV delivers its daily news format (*ATV Aktuell*) three times a day, in addition to news magazines (*ATV Die Reportage*) with lower frequency. PULS 4 produces two news formats, *Café Puls at breakfast time* and *Puls 24 News in the evening*, followed by an infotainment magazine.

On most radio programmes, short news flashes every full hour are common. ORF's programme Ö1 offers longer news formats: two morning news broadcasts – including one in English and French – a one-hour news broadcast at lunch time (*Mittagsjournal*), and four news formats in the evening. In addition, radio magazines are quite common. All public service radio channels and many local private channels provide podcasts or are also available as web radio.

Albeit this rich variety of news, there is still no Austrian 24-hour–news television or radio channel, even though some foreign news channels (*ntv, n24, CNN*) are available via cable or satellite. Furthermore, there is no Internet-only news channel online, as all sizeable Austrian news websites are subsidiaries of mass media corporations.

(E4) Minority/Alternative media

2 POINTS

IN 2011
2 POINTS

The availability and institutionalisation of minority media depends on whether the minority is legally recognised. Overall, a wide range of minority media are available; however, their reach is limited.

Austria has six ethnic minority groups, recognised by law, whose languages have official status: Croatian, Romani, Slovak, Slovene, Czech, and Hungarian. Furthermore, Austrian sign language is recognised as a minority language. Particularly in the 1960s, and again in the 1990s, the number of Turkish speakers and of the languages of the former Republic of Yugoslavia surged. However, their languages do not have official status as minority languages in Austria. For this reason, media initiatives in these languages are either private or non-commercial projects.

ORF is obliged by law to provide programmes in the official minority languages (ORF-Gesetz, 2021: para. 5). Some regional ORF studios have special

newsrooms that exclusively produce content in minority languages. On television, one weekly nationwide broadcast format (*Heimat*, *fremde Heimat*) is dedicated to minority issues such as integration, cultural diversity, and so forth. Furthermore, weekly television magazines in the main minority languages are broadcasted in the eastern (Burgenland) and southern provinces (Styria, Carinthia). ORF also organises offline events for minority groups in Austria and has extended its services during the decade since 2009.

In addition, the Slovenian minority in southern Austria is addressed by a 24-hour radio programme, jointly operated by the community-operated radio station *Radio Agora* and the regional ORF studios. Broadcast time is shared among the two broadcasters since 2011 (ORF 2020: 158).

As a service for hearing-impaired persons, some 70.1 per cent of all television broadcasts are complemented by subtitles, including all main news programmes, and ORF's online platform TVthek contains specific programme sections for these persons. Furthermore, selected programmes are transmitted in Austrian sign language, among them news broadcasts, live-broadcasts from parliament, and service-oriented programmes (ORF, 2020: 173f.). The overall number of features for people with disabilities has significantly increased since 2009.

Content analysis of representation of disabled persons in Austrian newspapers, ORF television, and selected Facebook pages identified considerable deficits. Disabled persons are strongly misrepresented in the media, stereotyped, and marginalised, and coverage is mostly focused on disabled celebrities from sports and politics (Pernegger, 2017).

As in 2009, Austria had 14 non-commercial radio projects in 2019, all of them limited to specific regions, with the largest in Vienna (*Orange 94.0*), Klagenfurt (*Radio Agora*), and Graz (*Radio Helsinki*) (VFRÖ, 2018: 19). These community-based radios put their focus not only on minorities, but also on disadvantaged people, such as migrants. Furthermore, a non-commercial television channel with significant amounts of foreign-language content is located in Vienna (*Okto TV*).

Since 2009, community radios and television providers are eligible for public funding under the non-commercial media fund. In 2019, some EUR 2.9 million were distributed among community broadcasters, of which EUR 1.96 million went to radio and EUR 0.91 million to television (KommAustria/RTR, 2019).

Finally, a wide variety of alternative and minority magazines and online media complement the Austrian media landscape. However, their finances are often in critical condition, and many depend on (limited) public subsidies. Again, KommAustria and RTR is in charge of the public funds established by law (KommAustria-Gesetz, 2021: para. 9i; Publizistikförderungsgesetz, 2021: para. 7). In 2019, some 73 journals and magazines were subsidised by a total of EUR 340,000 (2008: 93; EUR 361,000). Not all of these publications represent alternative or minority media.

Compared to 2009, progress has been made to institutionalise and fund alternative and minority media in Austria. There is a vibrant scene of small and medium-sized media, both online and offline, representing the cultural diversity in Austria. Nonetheless, deficits remain with regard to representation of disadvantaged people.

(E5) Affordable public and private news media

3 POINTS

IN 2011
3 POINTS

All news media have moderate sales prices compared to the average income of Austrian households. Prices for cultural expenditures have remained stable, or have even been decreasing, over the past ten years.

The average disposable income of an Austrian household in 2018 was about EUR 36,322; the lowest 10 per cent had less than EUR 15,120, and the highest 10 per cent had EUR 78,580, which shows a heterogeneous income level (Statistik Austria, 2018). The latest consumer statistics about cultural aspects from 2014 and 2015 show that an average household spent about EUR 2,990 per month in total. The average amount for culture-related expenditures was EUR 104.7, radio and television licence fees were about EUR 15.7 per month, those for newspapers and news magazines were EUR 14.9 per month, and another EUR 37.8 were spent on communication devices (Statistik Austria, 2015). All expenditures in total have decreased by a quarter since 2009–2010, when EUR 140 per month were spent (Statistik Austria, 2015). This means that the average cost of mass media (print, radio, television, telecommunication) in Austria ranges between 0.7 and 2.6 per cent of total household expenditures.

The average copy price for a newspaper lies between EUR 1.20 and EUR 2.90 (single-copy sale) and has been increasing slightly compared to the past ten years (ÖAK, 2019: 14–35). Concerning broadcasting, every Austrian household with a reception device is subject to a compulsory licence fee established by the law. Only a part of the total amount of the licence fee is given to the public service broadcaster ORF, as some additional regional and national fees are deducted; therefore, its amount varies regionally. The monthly fee has been slightly increasing since 2010 and ranges from EUR 20.93 (Vorarlberg, Upper Austria) to EUR 26.73 (Styria); the average annual fee is about EUR 295.03 (compared to EUR 261.12 in 2010) (GIS, 2017). The broadcasting fee is lower if a household is only equipped with radio receivers. In addition, disabled people or low-income households can apply for reduction or remission of the licence fee.

Broadband availability has been increasing in Austria over the past 10 years, even in rural areas, where connecting households does not promise any profit for the company. Prices, however, remained stable or were even slightly decreasing: overall, Austrian households spent between EUR 26.60 (Internet only, up to 30

Mbits per second) and EUR 53.20 (Internet and television, over 100 Mbits per second) per month on Internet connections in 2018 (RTR, 2019a: 35).

Table 10 *Average annual costs of different media, 2018 (compared with 2008)*

	Average annual price (EUR)	% of household income (lower 10%)	% of household income (upper 10%)	% of average household income	% of average household income (2008)
Newspaper (subscription)	369.01	2.44	0.47	1.02	0.81
Newspaper (direct sale)	607.27	4.02	0.77	1.67	1.10
Radio (licence fee)	82.71	0.55	0.11	0.23	0.22
Television (licence fee, including radio)	295.03	1.95	0.38	0.81	0.77
Internet (broadband only, ≤ 30 Mbits per second)	319.20	2.11	0.41	0.88	1.00
Internet (broadband incl. TV, ≤ 30 Mbits per second)	420.00	2.78	0.53	1.16	1.13
Internet (broadband only, > 100 Mbits per second)	496.80	3.29	0.63	1.37	–
Internet (broadband incl. TV, > 100 Mbits per second)	638.40	4.20	0.81	1.76	–

Source: ÖAK, 2019; GIS, 2017; RTRa, 2019: 35; Statistik Austria, 201

(E6) Content monitoring instruments

1 POINT

IN 2011
1 POINT

Publicly available institutionalised and independent media monitoring instruments are rare in Austria.

Austria does not self-inspect its media content by default, and it never did. No publicly accessible media content monitoring is in place. The APA runs a commercial company, APA DeFacto, which collects all sorts of media content in their database, but access is restricted and analyses are sold to commercial customers. This database is highly useful for research purposes, but the company does not itself publish any research findings, apart from occasional rankings such as the representation of politicians in Austrian media (Who has been mentioned most often? Politikerranking).

The public service broadcaster ORF is obliged by law to publish an annual analysis of its programme (ORF-Gesetz, 2021: para. 7). These annual reports are produced internally by ORF and must be published on its website (latest report: ORF, 2019). It is very detailed with regard to legal programme and content obligations. It reports about the amount and share of European programmes

within the entire programming, according to EU legislation. Nonetheless, these reports focus on numbers, counting minutes and genres, and not on content and quality itself. This could only be done by external research.

Such content-related research on Austrian television has been commissioned and financed by the regulator KommAustria and RTR for several years (2007, 2008, 2010, 2012; the latest: Woelke, 2012), but were discontinued thereafter. These programme analyses included ORF channels, as well as private-commercial television channels (ATV, PULS 4, ServusTV).

In 2015, research efforts were undertaken to measure the quality of the Austrian media (Seethaler, 2015), but this research was limited to a single study. From 2019 to 2021, a tri-national comparative news content analysis in Austria, Germany, and Switzerland has been done by several university institutes in these countries, but results are not yet published (expected 2021).

Compared to 2009, there is even less media monitoring in Austria exercised by independent supervising bodies. The only systematic monitoring instrument is ORF's internal annual report.

(E7) Code of ethics at the national level

2 POINTS

IN 2011
1 POINT

The self-governed code of ethics for print media is well respected. For audiovisual and Internet-based media no national code exists (only company rules).

The Pressrat [Press Council], a self-governed organisation composed of journalists' associations, press companies, and trade associations released the most prominent code of media ethics. Almost all print media in Austria subject themselves to the council's code of ethics (with the notable exception of the two largest daily newspapers *Kronenzeitung* and *Heute*). Founded in 1961, the council was suspended between 2002 and 2010 due to unsettled internal disputes. Since its restoration, the Press Council examines complaints in three senates. In 2019, some 297 complaints were filed, of which 37 were considered to breach the code. Most cases concerned the boulevard daily newspapers *Österreich* (14 cases) and *Kronenzeitung* (9 cases) (Österreichischer Presserat, 2019). According to the council's rules, such violations of the code must be published in the respective media. 93 per cent of all journalists confirmed in 2019 that their employer medium respects this code (Kaltenbrunner et al., 2020: 198). This is remarkable, because the Press Council's code of ethics does not apply to audiovisual media or the Internet. For the latter media, no national code of ethics exists.

Most of our interviewees accepted the guidelines of the code of ethics and affirmed compliance with high ethical standards in their newsrooms, as they did in 2011 as well (Grünangerl & Trappel, 2011). Most of them even confirmed

that the norms of the code are often and regularly quoted in newsroom meetings, but not necessarily the code itself. This applies in particular to journalists and editors-in-chief of newspapers in our sample.

At the level of communication research, media ethics is a prominent field of activities in Austria. Since 2015, the Interdisciplinary Media Ethics Centre unites communication scholars and practitioners to discuss and consult on media ethics. The centre is based at the University of Klagenfurt (or Celovec).

Another association dedicated to the improvement of journalistic (ethical) standards is the Initiative für Qualität im Journalismus [Initiative for Quality in Journalism], which organises public discussions about ethical standards and quality in journalistic work.

Compared with 2009, codes of ethics are better networked into journalism practices, and after ten years, almost all print media today honour the work of the Austrian Press Council. However, there is not a national code of ethics for audiovisual and Internet-based media, let alone legally binding instruments.

(E8) Level of self-regulation

2 POINTS

IN 2011
1 POINT

Self-regulation occurs rather informally; institutionalised or codified rules and procedures are rare.

All Austrian news media provide a mission statement declaring their fundamental orientation, as required by the Media Act (Mediengesetz, 2021: para. 25). However, as the law does not contain any further instructions about the length and content of these mission statements, some news media keep them short and non-specific (e.g., *Kronenzeitung*, *Standard*, *Falter*). Many of them refer to the independence of the medium and its responsibility for democracy and human rights.

Interviewees confirmed that internal rules on reporting exist (one newspaper's editor-in-chief addressed them as "golden rules"), but most of them referred to some sort of informal and internal culture for self-criticism and newsroom standards. One respondent put the rule very simply: "The story must be true". Written compliance rules exist only in exceptional cases in private media, but undue behaviour by journalists is sanctioned by management according to house rules.

In contrast to these rather relaxed applications of self-regulation rules in the private sector, ORF journalists work under strict and codified internal rules, required by law. The internal code of conduct[4] and the very detailed journalists' statute[5] regulate rights, obligations, and standards of journalistic work. This includes strict compliance rules concerning the activities of leading journalists outside their ORF employment, refusal of presents and other benefits offered by

third parties, and so forth. Journalists are held to refraining from any activity that might create doubt about ORF's independence. An internal ethics council, comprising representatives of the management and journalists, settles disputes on the application of these rules.

Compared to 2009, the level of self-regulation has substantially improved for the public sector's ORF, but remained weak for all other media.

(E9) Participation

2 POINTS

IN 2011
1 POINT

Audience participation happens by posting comments online in some web-editions of newspapers and by analogue letters to the editor. Austrian newsrooms are not open to citizens' participation.

In the decade since 2009, appraisal and importance of user contact and participation have significantly increased. While ten years ago, letters to the editor and in some cases online postings were the only ways to contact newsroom members; in 2019, all respondents considered audience and user interaction as crucial success factors. One editor-in-chief (*Salzburger Nachrichten*), for example, travels to different locations within the footprint of his paper every second month, inviting citizens for a readers' evening. In another case, a newspaper entertains readers' panels of some 30 persons, giving feedback to the newspaper's content three times a year. It has become the normal procedure to run a social media team of up to ten members, exclusively looking after the various interactive online channels on digital platforms. One national newspaper (*Der Standard*) organised two waves of curated public dialogue sessions among readers in 2018 and 2019 ("Österreich spricht", "Europa spricht"). On a regular basis, newspapers also invite readers to critically discuss one of the editions of the previous week.

ORF television also invites about 200 viewers every second month in one of Austria's provinces to discuss programme matters. At the institutional level, ORF has created a "public value team" to establish sustainable relations with a wide variety of stakeholders in Austria. This team not only publishes annual "public value" reports and runs a website,[6] but also organises events at the ORF premises, welcomes group visitors (such as schools), and pays visits to external events upon request. However, newsrooms remain closed for the public, and no standardised interaction takes place in the television studios. This latter attitude is also reflected in ORF radio, with very little interaction with listeners.

(E10) Rules and practices on internal pluralism

2 POINTS

IN 2011
1 POINT

Most Austrian newsrooms do not have codified rules on internal pluralism – public service television being the exception. Leading newsrooms are undertaking efforts to extend the range of voices represented by the media.

Compared with 2009, sensitivity for internal pluralism has increased. While ORF is legally obligated to represent all significant voices in society, private media follow their own preferences. Newsroom journalists in our sample confirm that the choice of experts and voices is repeatedly discussed, and in one case, a pool of experts is systematically set up together with a national university. Similarly, ORF television scouts for experts in various fields and provides them with specific training for how to perform in front of a camera. In addition, each journalist uses their personal contacts for gathering information.

However, most respondents admit that looking for new faces and voices regularly falls prey to constraints of time and tight editorial deadlines. Experienced experts know how to fulfil the expectations of journalists and make their life easier with quick responses.

Overall, diverse opinions remain welcome in Austrian newsrooms and are promoted by the editors-in-chief. Journalists are generally free to publish their work, with no internal interference, as long as their work falls largely within the mission statement of the media organisation.

Dimension: Control / Watchdog (C)

(C1) Supervising the watchdog "control of the controllers"

2 POINTS

IN 2011
2 POINTS

Self-observation by journalists in the media and public debates about journalism have increased. But apart from some independent initiatives, no systematic media observation is done in Austria.

Controlling the (media) controllers is not particularly pertinent in Austria and has no tradition. Nonetheless, a few initiatives can be listed. Online-only initiatives on the issue of media content surveillance and control had been active in the past (e.g., *Krone-Blog* and *Medienschelte*) but have disappeared again. Currently, *Kobuk* is run by students of Communication Studies in the University of Vienna. This blog observes media coverage, most frequently by *Kronenzeitung* and *Österreich*.

A more professional media watch is exercised by the daily newspaper *Der Standard* in its online edition. There, the "*Etat*" section is dedicated to media and media business affairs and is a rich information source about media. A

subsection of that website is dedicated to authors from the field of communication studies reporting and commenting on communication affairs ("Ein Fall für die Wissenschaft"). Other newspapers also employ specialised journalists to report about media and communication, dedicating sections of the paper to these matters (e.g., *Salzburger Nachrichten*, *Kleine Zeitung*). Some magazines specialise in media issues, aiming at journalists as readers and discussing media economics, the functions and roles of media for society, or debates on journalistic ethics and standards (e.g., *Der Österreichische Journalist*, *Horizont*).

Furthermore, the crowd-funded hybrid-magazine *Dossier* specialises on investigative journalism and addressed the history, coverage, and governance of *Kronenzeitung* at the occasion of its 60th anniversary in 2019.[7] In May 2017, ORF launched a monthly radio feature on media affairs and media politics, "#doublecheck". This magazine-style radio broadcast addresses media and communication matters with a critical view.[8] There is no corresponding format in television.

Regarding the code of ethics for print media, the Austrian Press Council continuously scrutinises violations based on complaints. In 2019, some 297 complaints were filed, of which 37 were considered to breach the code. Most of these cases concerned the boulevard daily newspapers *Österreich* (14 cases) and *Kronenzeitung* (9 cases) (Österreichischer Presserat, 2019) (see also Indicator E7 – Code of ethics at the national level).

Apart from such self-observing and self-regulatory initiatives by journalists and the media, there is no systematic media-performance monitoring institution in Austria.

(C2) Independence of the news media from powerholders 1 POINT

In 2011
1 POINT

By law, journalists' independence is protected, but ownership structures limit this freedom in practice.

Powerholders are present in Austrian news media primarily in two ways: on the one hand, the public service broadcaster ORF is institutionally bound with politics, and on the other, ownership of quite a number of news media is firmly tied to business interests. Although political parties no longer play a significant role as media owners (the conservative peoples' party ÖVP owns one rather small regional newspaper, *Oberösterreichisches Volksblatt*), the largest parties recently started their own online media (*zur-sache.at*, *kontrast.at*).

The ORF-Act grants fundamental independence from powerholders to ORF (ORF-Gesetz, 2021: para. 32). Nevertheless, the close relationship to political parties and authorities becomes obvious in staff decisions taken by the board (*Stiftungsrat*), which is also in charge of appointing the director general (ORF-

Gesetz, 2021: para. 20; ORF-Gesetz: para. 22). Once in office, management and journalists are entitled to operate with full independence from political interests. The ORF television editor-in-chief confirmed the strict distance between politics and news reporting in day-to-day routines. Politicians sometimes try to intervene, but with no success. ORF news journalists are further protected by the journalists' statute, which clearly stipulates that journalists are fully independent in their editorial work (ORF, 2002: para. 2). Furthermore, ORF management must defend and protect journalists from any external intervention (ORF, 2002: para. 4).

In 2011, there were two important non-media institutions present in the Austrian media sectors: the Catholic Church (Katholischer Medien-Verein, Styria Media Group) and the financial service provider Raiffeisen Holding (*Kurier*, Verlagsgruppe News, *Profil*, Mediaprint, Kronehit, Sat1 Austria, etc.) (Grünangerl & Trappel, 2011). Since then, the soft-drink giant Red Bull (Red Bull Media House, ServusTV, *Servus in Stadt & Land*, *Red Bulletin*) has joined them. All three are active in various media sectors (book publishing, print, radio, television, online).

The high level of media ownership concentration (see Indicator E1 – Media ownership concentration national level and Indicator E2 – Media ownership concentration regional level) and the many interrelations between different media companies have some negative effects on journalists' employment (Kaltenbrunner, 2013: 109). It is more difficult for journalists to change from one media company to another if the same owners also control alternatives for journalists and management staff.

Our respondents, however, denied any direct impact of owners on journalistic daily routines. Concerning the daily journalistic practice, the chairman of the journalists' union admitted that attempts to directly influence journalists or newsrooms are sometimes made by politicians, but with little or no effect.

(C3) Transparency of data on leading news media

2 POINTS

IN 2011
1 POINT

Ownership structures are transparent online, but some important information on media and advertising markets is lacking.

Basic data on the Austrian media system, in particular on media legislation, are easily accessible online and provided by the Federal Chancellery. Furthermore, the administrative media authority KommAustria and RTR provides regular reports on developments in the Austrian media and telecommunications markets (see also Indicator E6 – Content monitoring instruments).

ORF is required by law to annually publish business reports containing information on its financial performance (ORF, 2019). Furthermore, since

2008, ORF publishes annually a report on the fulfilment of the public service mission (latest edition: ORF, 2019).

Private media companies are not obliged to publish their business results and refrain from doing so. Therefore, data on the advertising revenues of private media companies are not accessible to Austrian citizens. According to law (Mediengesetz, 2021: para. 24–25), all media companies must provide information on ownership as well as their fundamental orientation in their imprint. Most of them publish this information online, but ownership is often complicated and complex, with several subsidiary companies and shareholders. Although not widely and actively provided, media ownership information is transparent – with very few exceptions.

(C4) Journalism professionalism

2 POINTS

IN 2011
2 POINTS

The share of higher education among journalists is increasing, but time and resources for professional journalism, as well as job satisfaction, are on the retreat.

Journalism in Austria is a profession that requires no formal skills. Nonetheless, some 48.5 per cent of Austrian journalists were graduates of higher education in 2019. This is a considerably higher share than ten years ago (34%). Women outnumber men, with 58 per cent of female journalists being graduates and only 42 per cent of male journalists. Among graduates, almost one third (32%) has studied communication science or journalism, followed by political science (13%) (Kaltenbrunner et al., 2020: 250).

The chair of the journalists' union emphasised the fact that journalistic ethos and resources do not always match in Austria. He pointed out that resources for investigative journalism have been reduced over the years, and journalists complain about the lack of financial support. Furthermore, journalists report back to the union that the work load has continuously increased, and journalists are too exhausted to engage in further education to enhance professionalism. In a representative survey, nearly 49 per cent of all journalists indicated that they were only partly or not satisfied with their daily workload, and 51 per cent said they were only partly or little satisfied with the time available for investigative reporting (Kaltenbrunner et al., 2020: 253). Compared with 2008, job satisfaction decreased significantly: By then, 75 per cent were very satisfied with working times; 51 per cent could not complain about their daily workload; and 44 per cent were very satisfied with the amount of time they spent on investigation and research (Kaltenbrunner et al., 2008: 82).

(C5) Journalists' job security

2 POINTS

IN 2011
2 POINTS

Journalists stay for a long time with their employers and are formally well protected by several laws. Economic pressures affect experienced journalists.

Measured against the number of years journalists work for their employers, Austrian journalists enjoy high and growing job security. 41 per cent of all journalists work for more than 15 years at the same media company. In 2008, this share was substantially lower at 21 per cent (Kaltenbrunner et al. 2008: 145; Kaltenbrunner et al., 2020: 251). Another 36 per cent were employed by the same media company for five to ten years. Freelance journalism in the news field is not a widely common practice.

Journalistic jobs are safe also with respect to their professional convictions. The Media Act contains a clause of conscience protecting journalists from writing against their convictions (Mediengesetz, 2021: para. 2). Furthermore, the Journalists' Act includes special privileges and financial compensation for journalists in case of dismissal or termination of contract related to changes in ownership or the political orientation of the medium (Journalistengesetz, 2021: para. 8 & 11). In addition, there are several collective agreements for journalists.

However, the chair of the journalists' union pointed to the fact that more and more journalists of advanced age were retiring early, some on request (or "invitation") by their employers. The obvious reason is the considerably higher cost of experienced journalists compared with beginners. The union's chair argues that cost increasingly becomes more important than experience.

(C6) Practice of access to information

1 POINT

IN 2011
2 POINTS

Although the Constitution guarantees freedom of information, the absence of a freedom of information act impedes access to public information and exacerbates journalistic work.

In Austria, the European Convention on Human Rights has constitutional status. Therefore, freedom of information is granted to all citizens. Nevertheless, the Austrian Constitution, in article 20(3 & 4), also requires the discretion of all official institutions and federal or state-related authorities, unless law declares special rights and conditions of access. As a result, some information is subject to official secrecy. However, specific federal and regional laws regulate that requests to official institutions and authorities must be answered, to provide transparency in state administration (Auskunftspflichtgesetze). Albeit, observers consider the Austrian legal status with regard to public information unsatisfactory. In their study on media freedom, Berka and Trappel (2019: 92) draw the conclusion that rules for access to public information are outdated, and a new

law on information freedom is overdue. The Global Right to Information ranking, where Austria scored the lowest of all 128 countries in 2020, reinforces the relevance of this conclusion (RTI, 2020).

In practice, journalists expressed concern about access to public information, but admitted finding ways around the strict Austrian legal provisions. The chair of the journalists' union pointed out that the absence of a freedom of information act impedes the work of younger journalists more often than the work of more experienced colleagues with a well-knit network of informants, also within the administration. Journalist respondents unanimously demand the release of such a freedom of information act. Some complain that the European directive on data protection has made access to public information even more difficult, as this directive provides administrations with another strong argument to keep documents secret when in doubt.

(C7) The watchdog and the news media's mission statement

3 POINTS
IN 2011
2 POINTS

Significant value is attributed to the watchdog function of media in Austria.

There was unanimous agreement among respondents that investigative and watchdog journalism is essential for Austria's leading news media. Both public and private media companies agree that investigation is the first and noble duty of all journalists. Most of the respondents explained that in their media company and newsroom, investigative reporting is welcome and supported. Several media have established task forces for investigative journalism with members committed to investigate, and they receive financial resources and extra time, if necessary.

Indeed, over the last few years, a good deal of investigative reports have likewise attracted the attention of citizens and politicians. For example, before and after the publication of the infamous Ibiza-video in 2019 – compromising the moral integrity of the former vice-prime minister – journalists launched a series of fact-based accusations against FPÖ. Investigative reporting even managed to unite competing newsrooms in cooperation, publishing findings in a coordinated way.

So far, Austrian news media only occasionally participate in international networks, such as the International Consortium of Investigative Journalists,[12] which collaborate globally in operations such as *Offshore Leaks* and *Panama Papers*.

As much as investigative reporting is part of the self-definition of journalists and editors-in-chief, this end is almost inexistent in the mission statements of the media. But journalists confirm that investigation does not need to be codified

in Austria – it is self-evident. In a representative survey, journalists described the professional self-perception of their job in the first place to inform (93%), explain (91%), and reflect (88%), but in the second place to criticise (78%; share of respondents who agree totally or predominately; Kaltenbrunner et al., 2020: 253).

(C8) Professional training

2 POINTS

In 2011
2 POINTS

Supply of further education is abundant in Austrian newsrooms, but course attendance is not.

As digital means are transforming the entire profession of journalism – from text creation to big data analysis – requirements for further professional training are obvious. The chair of the journalists' union confirmed the growing need for training, but observed that journalists attend less trainings than ten years ago.

The reason for this neglect is certainly not the supply side: Austria has two institutions providing further training for journalism, the Kuratorium für Journalistenausbildung [board of trustees for journalism training], and forum journalismus und medien [forum for journalism and media]. Both offer numerous courses of all sorts for skill and qualification development, including digital skills, and in the case of the board of trustees for journalism education, also a journalistic diploma. In addition, some provinces in Austria offer journalism training (e.g., Upper Austria), and ORF runs its own training centre for employees. Universities and other higher education institutions complement this already long list by offering further education courses in the field. As a result, more than half (51%) of all journalists are rather or very satisfied with their options for further education (Kaltenbrunner et al., 2020: 253).

However, participation in trainings requires time and money, and both are scarce in newsrooms, respondents confirmed. Most editors-in-chief, who must approve such trainings, are willing to second journalists, but demand is limited. In exceptional cases, young talents are even sent to prestigious journalism universities such as Columbia University. By law, there are no requirements for journalists to attend further education, and all educational measures are voluntary; in turn, there is no right to continuous training either. If journalists ask for it, financial support is not guaranteed, but it is quite prevalent in Austrian newsrooms.

(C9) Watchdog function and financial resources 2 POINTS

In 2011
2 POINTS

Austrian newsrooms are positive and try to provide resources for investigative reporting to the extent possible, but funds are strictly limited.

According to our respondents, and compared to the research results from 2009, more staff and financial resources were invested in investigations in 2019, although figures are not disclosed by the media (and probably do not exist).

All journalists and editors-in-chief confirmed that resources are made available for investigations. In some media, this happens once a month on average; other media have one person permanently positioned to follow investigative research. Overall, however, funds are strictly limited, and teams are established and financed on an ad hoc basis. One journalist pointed out that investigative journalism at the regional level can take place anyway, and does not necessarily require substantially more funding.

Conclusions

The 2019 research on the three dimensions for this Media for Democracy Monitor shows some progress of the Austrian media compared with 2009. At that time, the aftermath of the economic crisis had affected the media and their economic performance. The following period of high-density digitalisation of all journalistic and editorial processes has transformed the media internally and exposed them to giant competitors such as digital platforms, in the form of search engines (Google) and interactive personalised services like Facebook and YouTube.

Surprisingly, this potentially devastating transformation has not caused much deterioration to the performance of the Austrian media. Apparently, the fierce economic battle for advertising money has been compensated for by lowering costs and unlocking alternative revenues. Austria's media moved towards more ownership concentration, but also towards more investigative reporting and even more gender balance among journalists. Nonetheless, this report again draws a mixed picture of the democratic implications of the Austrian media system. The grading has modestly improved compared with 2010. One reason is the distinct progress by ORF, with its ethics council, journalists' statute, and reporting system.

Freedom of information is formally secured by law in Austria. News are available at moderate cost, leading news media have effective measures in place to defend themselves against internal and external influence, and journalists are well protected against offline and online harassment. The gender gap still exists in the form of glass ceilings; however, equal pay and almost gender-balanced

numbers of journalists constitute major progress. The absence of a freedom of information act sets Austria back amongst democratic countries.

Equality and interest mediation are overshadowed by the ongoing and high-level media ownership concentration. However, below the group of dominating media conglomerates, a vibrant and active alternative media scene has grown, interestingly not primarily online, but rather as community media, radio, and television. Actually, legacy media successfully captured the online media field, thereby increasing ownership concentration even further. Nonetheless, internal pluralism is alive and actively defended by concerned journalists. The public broadcaster ORF is an important cornerstone in this respect.

The control function and investigative reporting by the media remains highly valued by Austrian journalists. The high professional ethos of Austrian journalists concerning independence from and control of powerholders is, however, contradictory to the historically developed close relationship between media and economic or political powerholders. Nonetheless, journalists are committed to investigative reporting, and recent contemporary history shows they are quite successful.

Overall, Austria's leading news media managed to keep their standards during this turbulent decade of unleashed digitalisation. Measured by our indicators, Austria's news media serve democracy fairly well.

Notes

1. https://www.rtr.at/de/inf/RTROpenData
2. The general limits are: worldwide revenue higher than EUR 300 million, national revenue more than EUR 30 million, or at least two companies with worldwide revenue higher than EUR 5 million. The revenues of media companies are multiplied by 200; those of media related companies by 20 (para. 9 (1) and (3) Kartellgesetz 2019/2005). Media diversity must be addressed in the acknowledgement of the merger (para. 10 (1) 2.) and mergers must be refused if media diversity loss is to be expected (para. 13). So far, no media merger was refused by *Bundeswettbewerbsbehörde*.
3. *Verlagsgruppe News* was obliged by the competition authority to guarantee the continued existence of *Profil* until 2006. This limit was exceeded and *Profil* and *Format* were both still produced in separated newsrooms until 2015. In 2016, *Format* merged with another title of *Verlagsgruppe News*, *trend*, and therefore ceased its existence by then.
4. Verhaltenskodex (https://der.orf.at/unternehmen/leitbild-werte/verhaltenskodex/index.html)
5. Redakteursstatut (https://der.orf.at/unternehmen/leitbild-werte/redakteursstatut/index.pdf)
6. https://zukunft.orf.at/
7. https://www.dossier.at/dossiers/kronen-zeitung/
8. https://oe1.orf.at/doublecheck

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Appendix

Table A1 *Daily reach and market share of radio in Vienna, 2019*

	Associated media company	Daily reach (projection to total population)	%*	Market share (%)
Ö3	ORF	371,000	22.3	29
Ö1	ORF	198,000	11.9	12
Ö2 Radio Vienna	ORF	188,000	11.3	15
Kronehit	Mediaprint	170,000	10.2	10
Radio Arabella	Radio Arabella GmbH	110,000	6.6	8
Ö2 Radio NÖ	ORF	98,000	5.9	8
Radio Energy	NRJ Group	95,000	5.7	5
88.6 - so rockt das Leben	Radio Eins Privatradio	77,000	4.6	6
FM4	ORF	75,000	4.5	4
98,3 Superfly	Superfly Radio GmbH	28,000	1.7	1
Radio Austria / Antenne Salzburg / Antenne Tirol	Radio Austria GmbH	23,000	1.4	1
Ö2 Radio Burgenland	ORF	22,000	1.3	2
Total public (ORF)		796,000	47.8	67
Total private (AUT)		420,000	25.2	30
Total		1,064,000	63.9	–
Population 10+		1,665,000	–	–
CR 3 (channels)				56
CR 3 (companies)				88

Comments: Population 10+ (national: 7,834,000, *n* = 22,141)

* daily listeners in per cent of local population, sorted by daily reach, table only shows channels with reach > 1%

Source: RMS, 2019

Table A2 *Daily reach and market share of radio in Lower Austria, 2019*

	Associated media company	Daily reach (projection to total population)	%*	Market share (%)
Ö3	ORF	613,000	41.1	39
Ö2 Radio NÖ	ORF	361,000	24.2	28
Kronehit	Mediaprint	212,000	14.2	10
88.6 - so rockt das Leben	Radio Eins Privatradio	118,000	7.9	6
Ö1	ORF	113,000	7.6	6
Ö2 Radio Vienna	ORF	90,000	6	5
Radio Arabella	Radio Arabella GmbH	72,000	4.8	3
Arabella NÖ (local)		46,000	8	–
Arabella Mostviertel (local)		41,000	10	–
FM4	ORF	37,000	2.5	2
Radio Energy	NRJ Group	31,000	2.1	1
Ö2 Radio Burgenland	ORF	19,000	1.3	1
Radio Austria / Antenne Salzburg / Antenne Tirol	Radio Austria GmbH	18,000	1.2	1
Ö2 Radio OÖ	ORF	15,000	1	1
Total public (ORF)		1,035,000	69.4	81
Total private (AUT)		407,000	27.3	21
Total		1,192,000	79.9	–
Population		1,492,000	–	–
CR 3 (channels)				77
CR 3 (companies)				97

Comments: Population 10+ (national: 7,834,000, *n* = 22,141)

* daily listeners in per cent of local population, sorted by daily reach, table only shows channels with reach > 1%

Source: RMS, 2019

Table A3 *Daily reach and market share of radio in Upper Austria, 2019*

	Associated media company	Daily reach (projection to total population)	%*	Market share (%)
Ö3	ORF	487,000	37.4	36
Ö2 Radio OÖ	ORF	339,000	26.0	29
Life Radio OÖ	Moser Holding	168,000	12.9	10
Kronehit	Mediaprint	160,000	12.3	7
Ö1	ORF	113,000	8.7	7
Radio Arabella OÖ	Radio Arabella GmbH	78,000	6.0	5
FM4	ORF	43,000	3.3	2
Ö2 Radio Salzburg	ORF	38,000	2.9	3
Welle 1 OÖ	Welle Salzburg GmbH & Co. KG	27,000	2.1	1
Ö2 Radio NÖ	ORF	26,000	2.0	1
Radio Austria / Antenne Salzburg / Antenne Tirol	Radio Austria GmbH	16,000	1.2	1
Total public (ORF)		867,000	66.6	75
Total private (AUT)		388,000	29.8	24
Total		1,048,000	80.5	–
Population 10+		1,302,000	–	–
CR 3 (channels)				75
CR 3 (companies)				92

Comments: Population 10+ (national: 7,834,000, *n* = 22,141)

* daily listeners in per cent of local population, sorted by daily reach, table only shows channels with reach > 1%

Source: RMS, 2019

Table A4 *Daily reach and market share of radio in Salzburg, 2019*

	Associated media company	Daily reach (projection to total population)	%*	Market share (%)
Ö3	ORF	198,000	40.4	37
Ö2 Radio Salzburg	ORF	165,000	33.8	35
Radio Austria / Antenne Salzburg / Antenne Tirol	Radio Austria GmbH	56,000	11.5	11
Ö1	ORF	47,000	9.6	8
Kronehit	Mediaprint	26,000	5.4	3
FM4	ORF	16,000	3.2	2
Welle 1 Salzburg	Welle Salzburg GmbH & Co. KG	16,000	3.3	3
Klassik Radio Salzburg	Klassik Radio AG (DE)	11,000	2.2	1
Radio Energy Salzburg	NRJ Group	9,000	1.8	1
Ö2 Radio OÖ	ORF	7,000	1.5	2
Total public (ORF)		351,000	71.8	81
Total private (AUT)		99,000	20.3	18
Total		394,000	80.5	–
Population 10+		489,000	–	–
CR 3 (channels)				83
CR 3 (companies)				95

Comments: Population 10+ (national: 7,834,000, *n* = 22,141)

* daily listeners in per cent of local population, sorted by daily reach, table only shows channels with reach > 1%

Source: RMS, 2019

Table A5 *Daily reach and market share of radio in Burgenland, 2019*

	Associated media company	Daily reach (projection to total population)	%*	Market share (%)
Ö3	ORF	106,000	40	36
Ö2 Radio Burgenland	ORF	84,000	31.7	33
Kronehit	Mediaprint	35,000	13.4	9
88.6 - so rockt das Leben	Radio Eins Privatradio	23,000	8.7	7
Ö1	ORF	21,000	7.9	5
Antenne Steiermark	Antennte	12,000	4.5	3
Ö2 Radio Steiermark	ORF	11,000	4.2	4
Ö2 Radio Vienna	ORF	10,000	3.8	4
Ö2 Radio NÖ	ORF	9,000	3.3	3
FM4	ORF	7,000	2.6	1
Radio Arabella	Radio Arabella GmbH	4,000	1.6	1
Total public (ORF)		190,000	72	83
Total private (AUT)		67,000	25.5	18
Total		216,000	81.8	–
Population 10+		264,000	–	–
CR 3 (channels)				78
CR 3 (companies)				99

Comments: Population 10+ (national: 7,834,000, *n* = 22,141)

* daily listeners in per cent of local population, sorted by daily reach, table only shows channels with reach > 1%

Source: RMS, 2019

Table A6 *Daily reach and market share of radio in Styria, 2019*

	Associated media company	Daily reach (projection to total population)	%*	Market share (%)
Ö2 Radio Stmk.	ORF	379,000	34.2	36
Ö3	ORF	372,000	33.5	30
Antenne Steiermark	Styria	224,000	20.2	19
Ö1	ORF	115,000	10.4	7
Kronehit	Mediaprint	96,000	8.7	5
Soundportal	Soundportal Graz GmbH.	42,000	3.8	3
FM4	ORF	31,000	2.8	2
Radio Grün-Weiß	Radio Grün Weiß GmbH.	23,000	2.1	2
Ö2 Radio Burgenland.	ORF	13,000	1.2	1
Total public (ORF)		731,000	65.9	73
Total private (AUT)		352,000	31.7	29
Total		901,000	81.2	–
Population 10+		1,109,000	–	–
CR 3 (channels)				85
CR 3 (companies)				97

Comments: Population 10+ (national: 7,834,000, *n* = 22,141)

* daily listeners in per cent of local population, sorted by daily reach, table only shows channels with reach > 1%

Source: RMS, 2019

Table A7 *Daily reach and market share of radio in Carinthia, 2019*

	Associated media company	Daily reach (projection to total population)	%*	Market share (%)
Ö2 Radio Kärnten	ORF	218,000	43.4	48
Ö3	ORF	166,000	33.1	25
Antenne Kärnten	Styria	120,000	23.8	19
Ö1	ORF	42,000	8.3	4
Kronehit	Mediaprint	34,000	6.8	3
FM4	ORF	11,000	2.2	1
Welle 1 Kärnten	Welle Salzburg GmbH & Co. KG	10,000	1.9	1
Ö2 Radio Steiermark	ORF	8,000	1.5	1
Total public (ORF)		359,000	71.3	77
Total private (AUT)		153,000	30.5	24
Total		431,000	85.7	–
Population 10+		503,000	–	–
CR 3 (channels)				92
CR 3 (companies)				99

Comments: Population 10+ (national: 7,834,000, *n* = 22,141)

* daily listeners in per cent of local population, sorted by daily reach, table only shows channels with reach > 1%

Source: RMS, 2019

Table A8 *Daily reach and market share of radio in Tyrol, 2019*

	Associated media company	Daily reach (projection to total population)	%*	Market share (%)
Ö3	ORF	235,000	35.4	32
Ö2 Radio Tirol	ORF	177,000	26.6	26
Radio U1 Tirol	U1 Tirol Medien GmbH	84,000	12.7	13
Kronehit	Mediaprint	74,000	11.2	8
Life Radio Tirol	Moser Holding	68,000	10.2	8
Ö1	ORF	55,000	8.3	6
FM4	ORF	21,000	3.2	2
Radio Austria / Antenne Salzburg / Antenne Tirol	Radio Austria GmbH	15,000	2.3	1
Radio Osttirol (local)	Radio Osttirol GmbH	10,000	23.4	-
Klassik Radio Tirol	Klassik Radio AG (DE)	8,000	1.2	1
Total public (ORF)		416,000	62.5	65
Total private (AUT)		225,000	33.9	32
Total		665,000	80.4	–
CR 3 (channels)				71
CR 3 (companies)				86

Comments: Population 10+ (national: 7,834,000, *n* = 22,141)

* daily listeners in per cent of local population, sorted by daily reach, table only shows channels with reach > 1%

Source: RMS, 2019

Table A9 *Daily reach and market share of radio in Vorarlberg, 2019*

	Associated media company	Daily reach (projection to total population)	%*	Market share (%)
Ö2 Radio VBG	ORF	115,000	33.2	36
Ö3	ORF	93,000	27	24
Antenne Vorarlberg	Russmedia	86,000	24.9	23
Kronehit	Mediaprint	28,000	8	5
Ö1	ORF	24,000	7.1	4
FM4	ORF	12,000	3.6	2
Total public (ORF)		206,000	59.7	66
Total private (AUT)		108,000	31.2	28
Total		272,000	78.8	–
Population 10+		345,000	–	–
CR 3 (channels)				83
CR 3 (companies)				94

Comments: Population 10+ (national: 7,834,000, *n* = 22,141)

* daily listeners in per cent of local population, sorted by daily reach, table only shows channels with reach > 1%

Source: RMS, 2019

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