

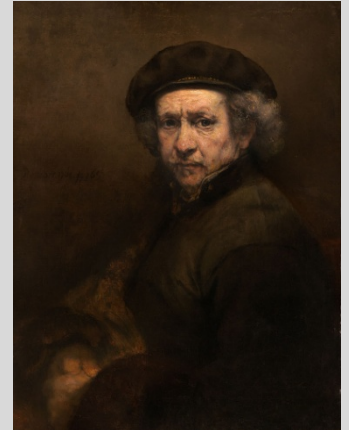
Culture shapes international Media Image of the Netherlands



Analysis of the image of the Netherlands in Egyptian, German, Indonesian, South African, Turkish and U.S. media regarding culture and the creative industry

2012-2014

- Culture among the top 10 topics in all analysed countries
- Old masters still very much alive
- Creative industry with limited coverage



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Executive Summary

International visibility of the Netherlands

Coverage of the Netherlands depends strongly on geographical and cultural proximity. Reporting is strongest in Germany, based on continuous awareness. Coverage in the U.S. is less salient and therefore more dependent on individual events and communication activities. Reporting in Egypt, Indonesia, South Africa and Turkey is limited, containing the impact of Dutch public diplomacy and international cultural policy.

Patterns of perception

While media from different countries report from different angles, there were some common trends in the period from 2012 to 2014. While reporting in 2012 was shaped by the government crisis after the dispute about the austerity budget and the subsequent elections, the inauguration of King Willem-Alexander was the dominant event in 2013. The Netherlands does not profit from their royals to the same extent as the United Kingdom, which reflects the different political traditions. Queen Beatrix, King Willem-Alexander and Queen Maxima have been covered in a consistently positive way in the news media. The perception of the Netherlands deteriorated again in 2014 in the context of the Ukraine crisis and the shooting down of flight MH17.

Critical aspects

While there was limited explicit criticism of the Netherlands or of Dutch protagonists, unfavorable developments contributed to an overall negative perception of the country. Notable critical aspects were the development of the economy, the law suit of the Mothers of Srebrenica, the activities of right-wing parties, the EURO crisis, bird flu and the Ukraine conflict. Aspects of Dutch social life, like, e.g. the policy on drugs and rising xenophobia were noted critically in countries like Egypt and Turkey. The colonial heritage and allegedly racist history was prominent in Indonesia. The conflict about “Zwarte Piet” made headlines in most countries.

Salience of culture and creative industries

Culture is a big asset of the Netherlands and contributes significantly to the positive perception of the country. Media worldwide are aware of the cultural heritage of the Netherlands; they frame Dutch culture to some extent in the mold of the Golden Century. There is strong coverage of Dutch literature in Germany and Dutch visual arts in other markets independently from the activities of Dutch international cultural policy. However, coverage of recent cultural trends is limited, while coverage of creative industries focuses on the IT sector and is weak apart from Germany.



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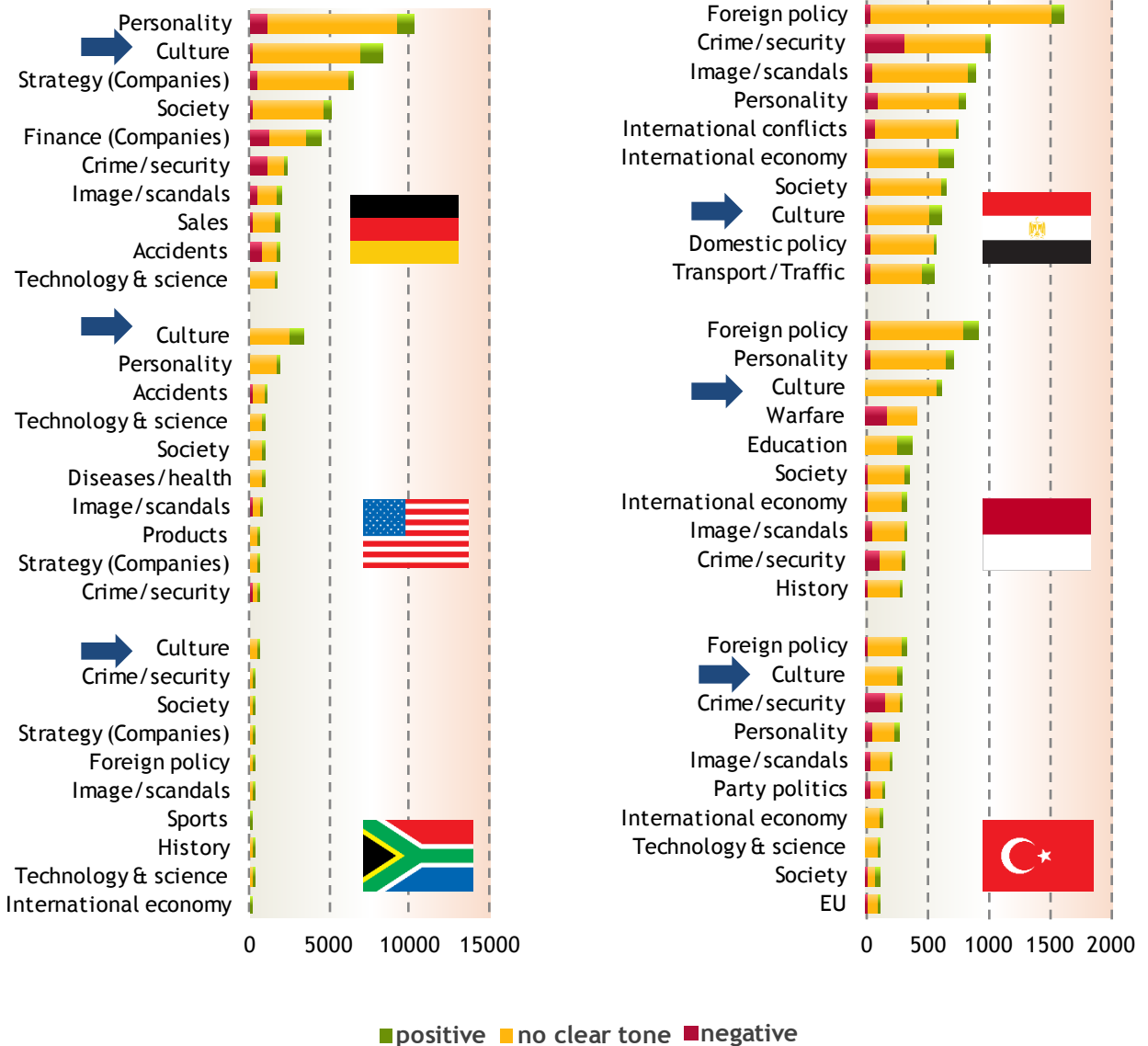
Culture among the top 10 topics in all countries

Coverage of the Netherlands 2012-2014: Topic structure

While culture and artists are covered most intensively in Germany, the U.S. and South Africa, media in the Middle East

and in Indonesia focus more strongly on foreign policy. But culture is among the top ten everywhere.

Volume and tone of coverage of the Netherlands, 2012-2014: Top ten topic groups in country comparison





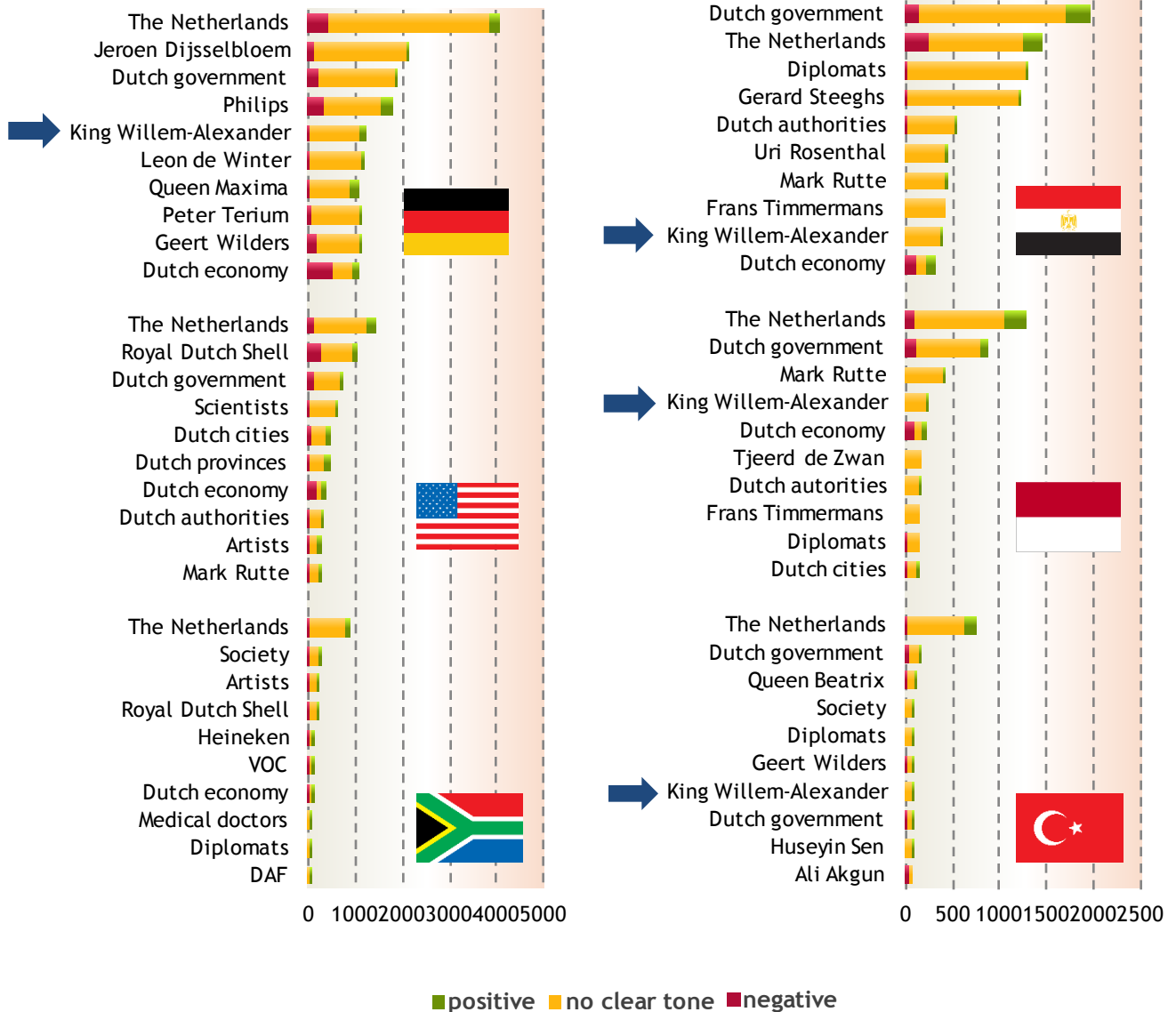
Monarchy supports the media image

Coverage of the Netherlands 2012-2014: Top protagonists

Strong economic connections with Germany are reflected in the intensive coverage of Dutch companies and the Dutch economy.

King Willem-Alexander was among the top ten protagonists in four out of the six markets as the new face of the country.

Volume and tone of coverage of the Netherlands, 2012-2014: Top ten protagonists in country comparison





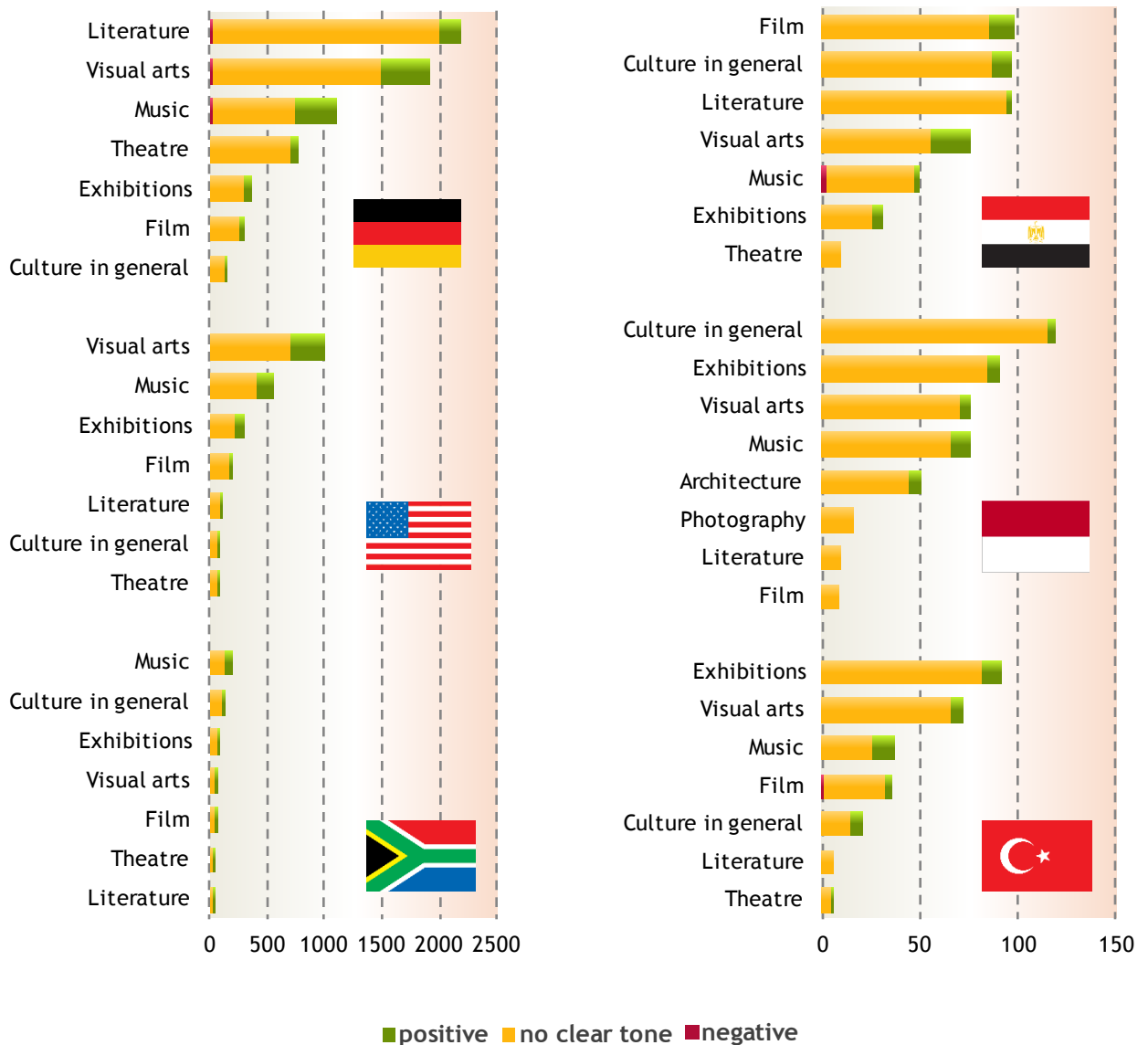
Visual arts dominate the image in Europe

Culture: Main genres in international media, 2012-2014

Media coverage of cultural issues reflects different tastes. As literature tops the media agenda in Germany, the Dutch plan to

flood that country with books in advance of the prestigious Frankfurt book fair in 2016 is promising.

Volume and tone of coverage of cultural issues, 2012-2014: Top genres in country comparison





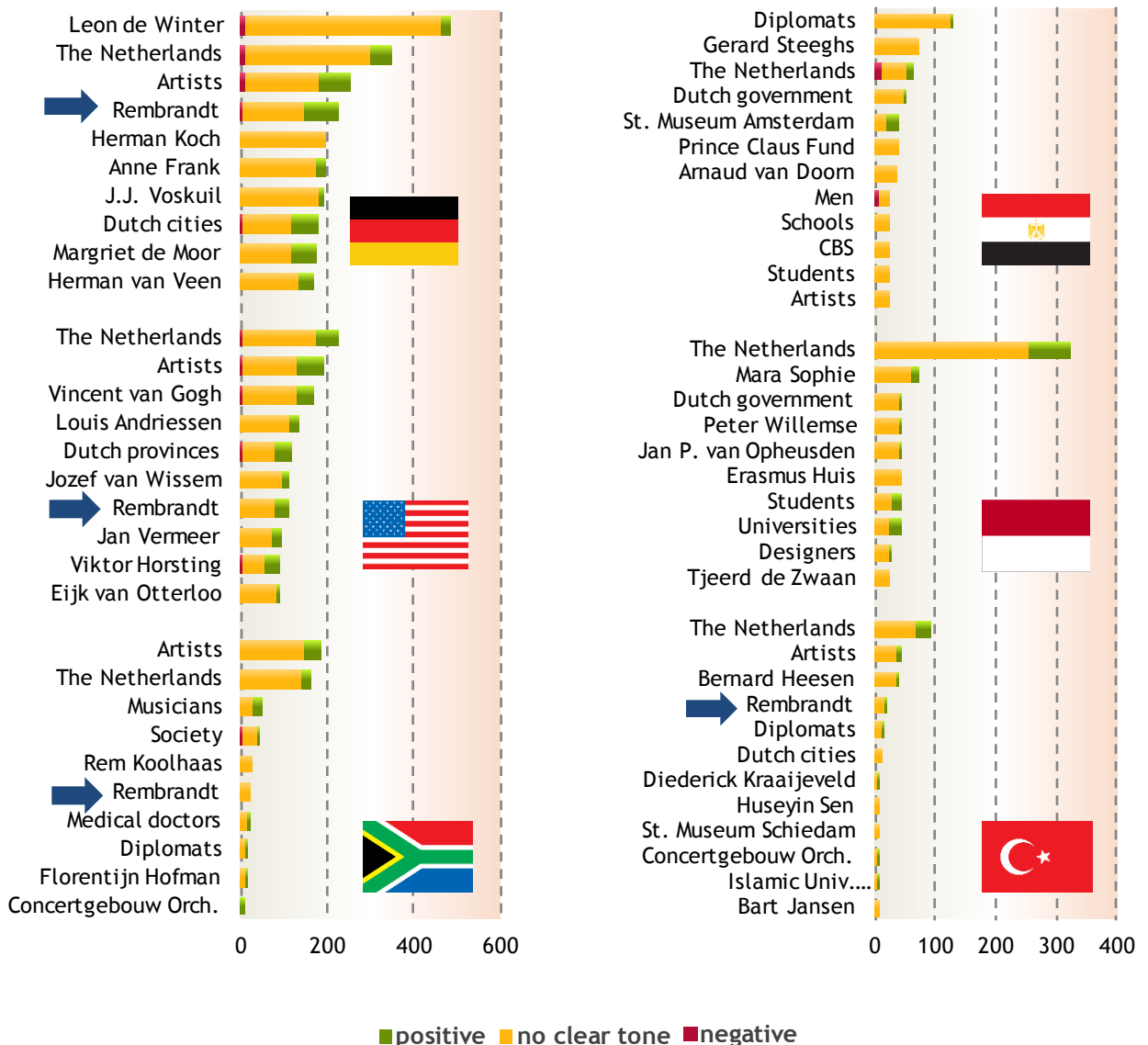
Culture with strong positive impact on the media

Culture: Main protagonists in international media, 2012-2014

The old masters of the Dutch golden century still contribute strongly to the positive perception of the Netherlands - especially in

Germany and the U.S. Rembrandt is the artist with the strongest presence over all media markets.

Volume and tone of coverage of cultural issues, 2012-2014: Top protagonists in country comparison





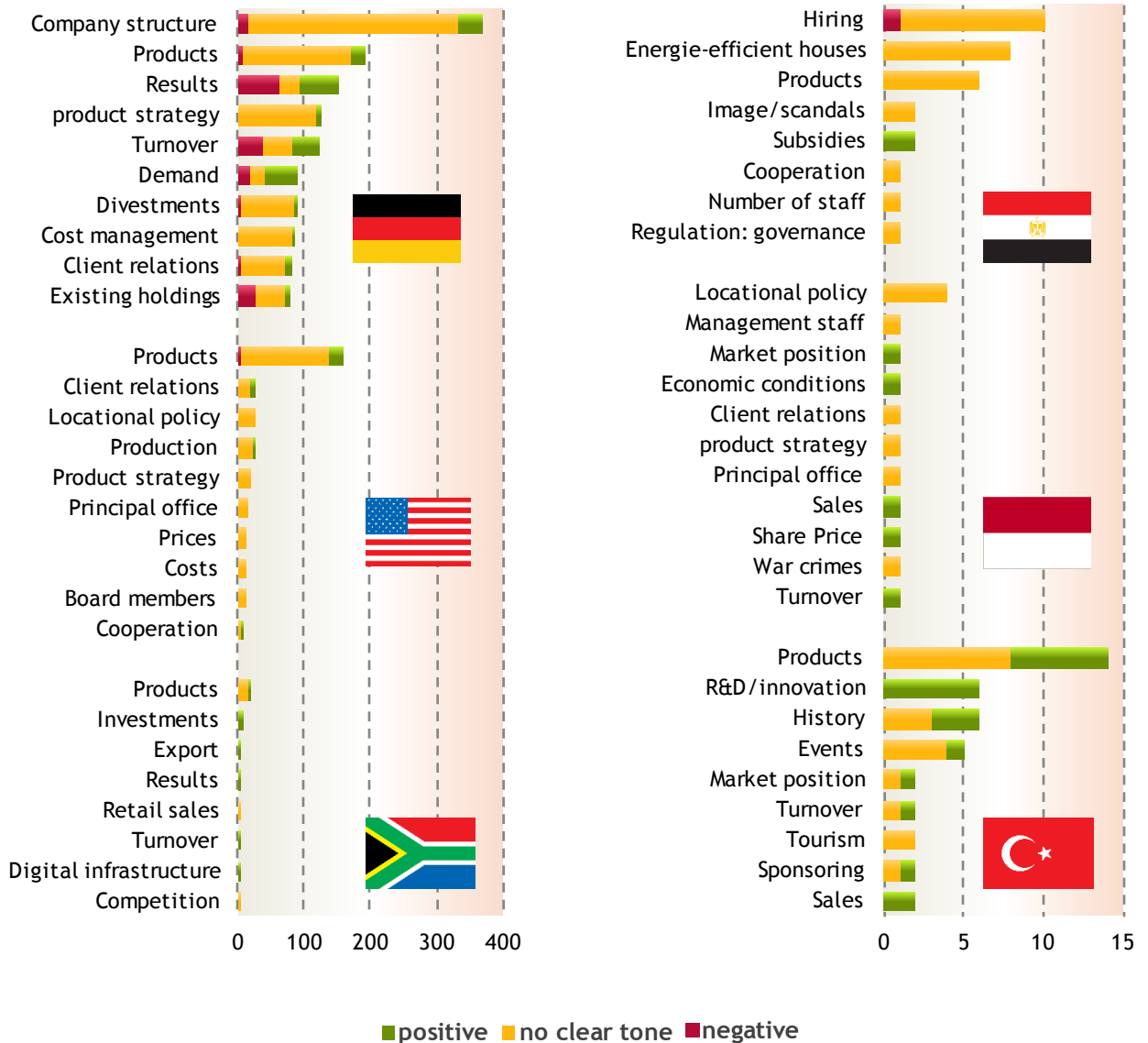
Creative industries prominent in mature markets

Creative industries: Topics in international media, 2012-2014

Coverage of creative industries comes with a promise: Many stories focus on the quality of the products. In-depth reporting in

Germany shines a spotlight on the challenges of globalization. Key value drivers, like R&D, do not figure prominently.

Volume and tone of coverage of creative industries, 2012-2014: Top issues in country comparison





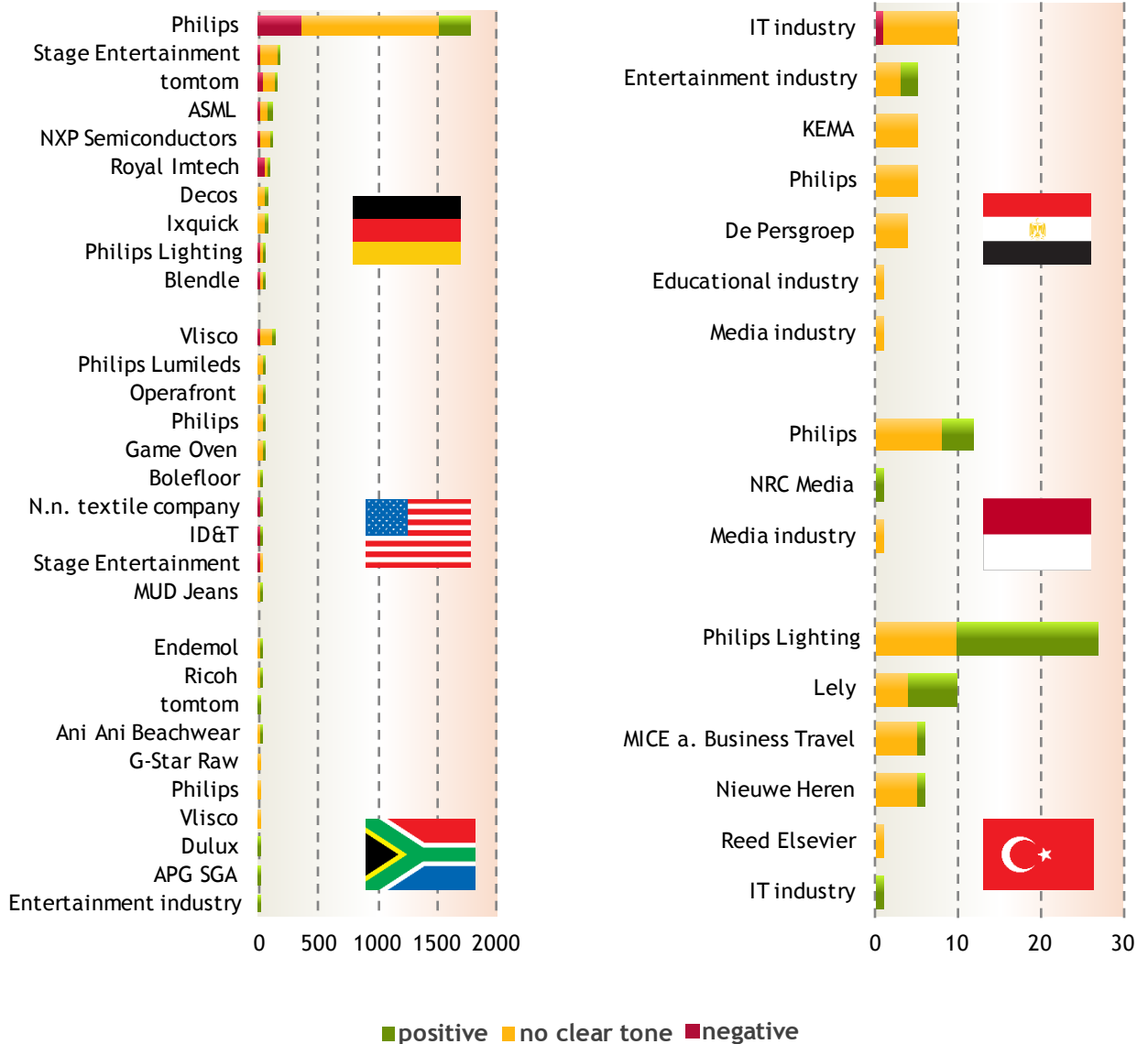
Philips dominates in three markets

Creative industries: Main protagonists, 2012-2014

The creative industries do not figure prominently in the news. Philips - the long-time champion of the Dutch IT industry is reported to

be increasingly under stress by German media. Reporting in the other media markets is rather erratic.

Volume and tone of coverage of creative industries, 2012-2014: Top protagonists in country comparison





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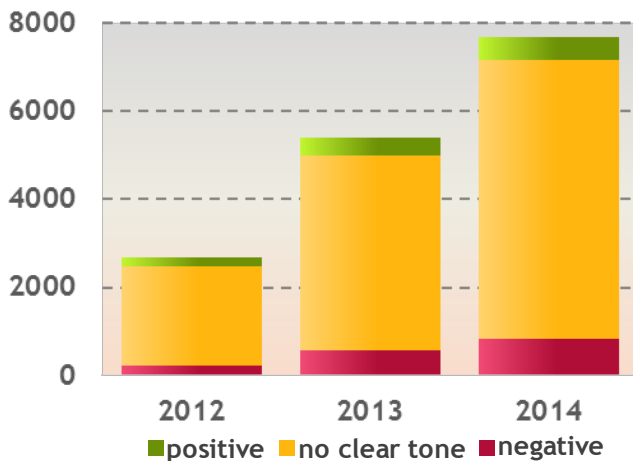
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Coverage increased as political unrest subsided

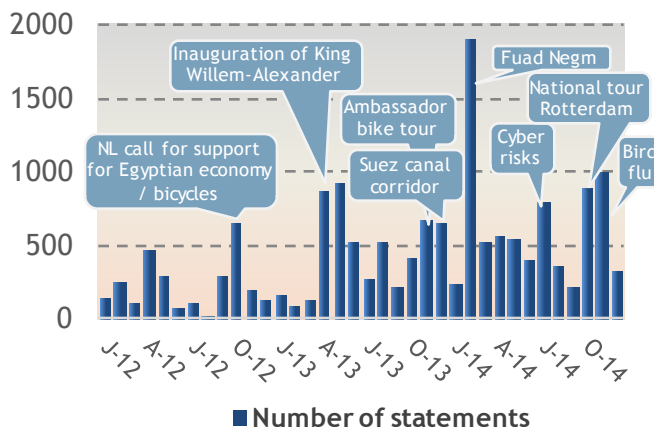
The Netherlands in Egypt 2012-2014: Statement analysis

Volume / tone of coverage of the Netherlands, Egyptian media, 2012-14



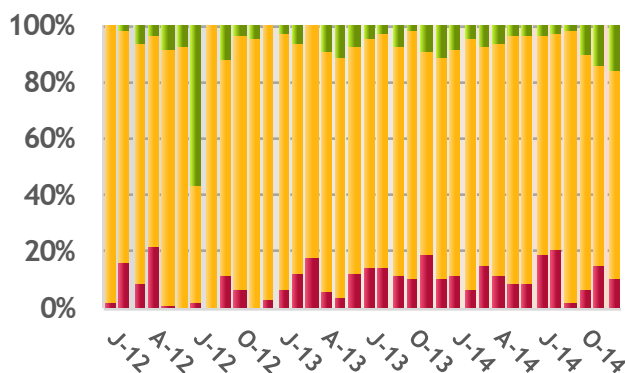
For the three years Media Tenor has analyzed 1,158 news stories in seven Egyptian opinion-leading print media. These comprise 15,747 statements about Dutch protagonists or the Netherlands. Overall coverage has increased significantly since 2012.

Monthly coverage of the Netherlands, Egyptian media, 2012-2014



Print coverage recorded a peak in July 2014 - thanks to a number of diplomatic, literature and international activities of the Dutch government. In November 2014 Egyptian media focused on the co-operation between the countries on water-resource management.

Tone of coverage of the Netherlands in Egyptian media, 2012-2014

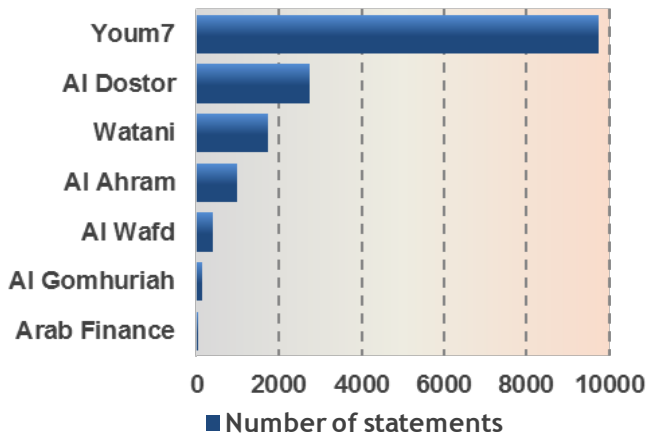


Over the 3 year period coverage was widely balanced with 10% of negative statements and 7% of positive statements, the balance being either neutral or ambivalent. Since October 2014 the tone has improved consistently, mainly based on cultural and technology issues.

Youm7 leads in terms of volume

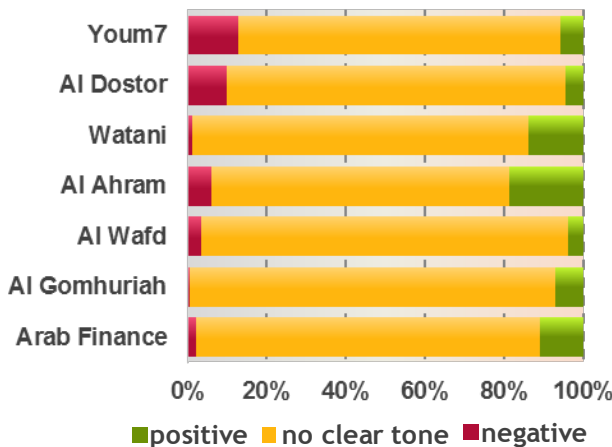
The Netherlands in Egyptian media 2012-2014: Statement analysis

Volume of coverage of the Netherlands in Egyptian media, 2012-2014



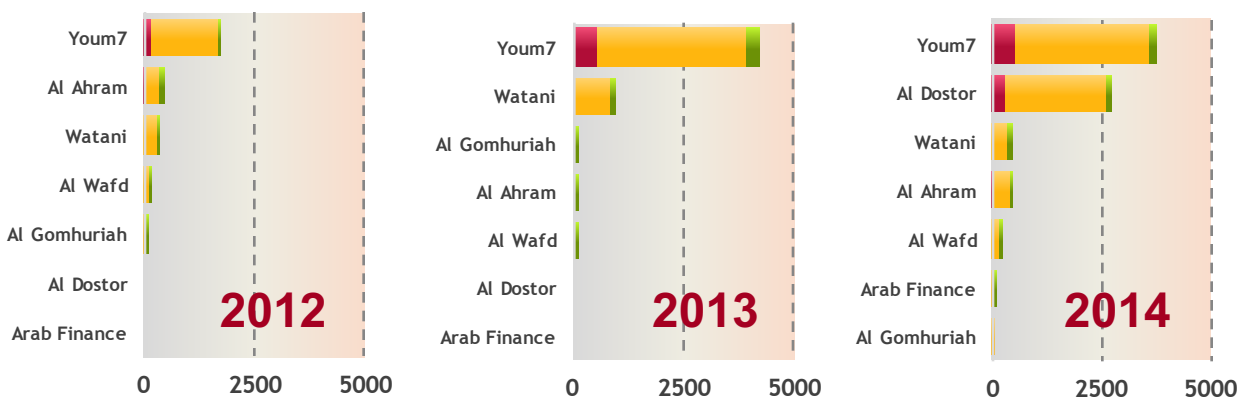
The majority of Egyptian media showed only a limited interest in the Netherlands and the activities of Dutch protagonists. **Youm7** stands out among the analyzed media. **Al Dostor**, an independent paper, reported as well on a relatively strong level about the Netherlands.

Tone of coverage of the Netherlands in Egyptian media, 2012-2014



Youm7 and **Al Dostor**, the media that reported most intensively about the Netherlands, tended to paint a more critical picture. **Al Ahram**, which is a quasi-official source, was most positive - possibly reflecting the intentions of the government.

Volume / tone of coverage of the Netherlands in Egyptian media, 2012-2014

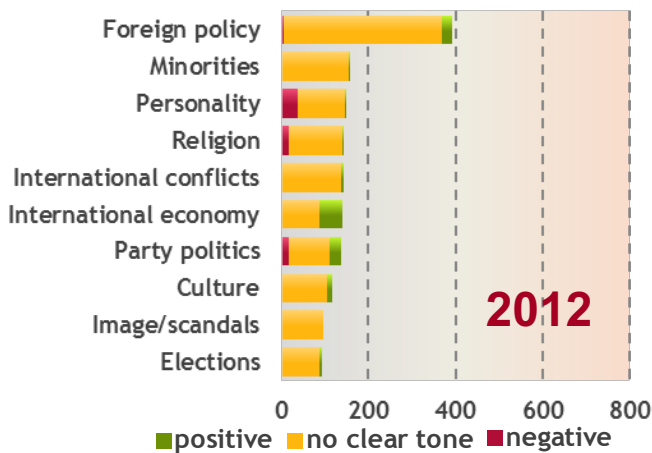




Cultural issues became more important

Topic structure of the Netherlands in Egypt: Statement analysis

Topic structure of the Netherlands in Egyptian media, 2012



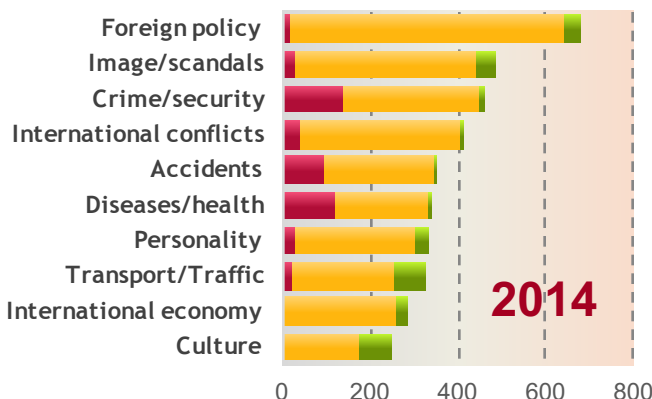
Foreign policy, party politics and economy shaped the perception of the Netherlands in 2012 - with on overall quite positive tonality. Cultural issues did not figure as prominently as in other countries. Geert Wilders' anti-Islamic propaganda was noted critically.

Topic structure of the Netherlands in Egyptian media, 2013



The topic structure was quite balanced in 2013 with a higher visibility of cultural issues compared to the previous year. Egyptian media focused more strongly on crime in the Netherlands, like, e.g., domestic violence and sexual harassment.

Topic structure of the Netherlands in Egyptian media, 2014



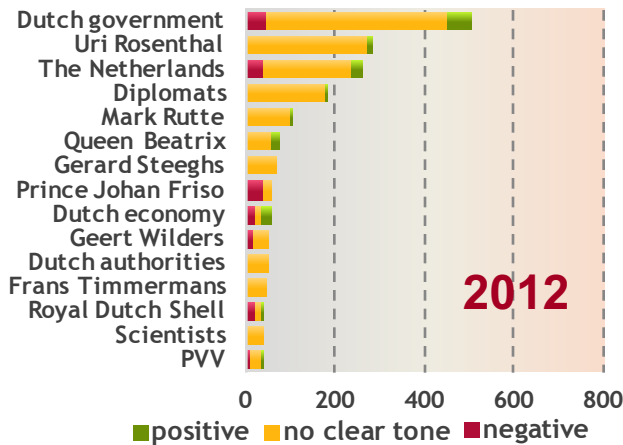
In 2014 diplomatic relations between the countries played the biggest role in the news about the Netherlands. Egyptian media reported intensively about Dutch initiatives like, e.g., Orange Bike Day and joint water resource management projects with Egypt.



Dutch diplomats in the spotlight

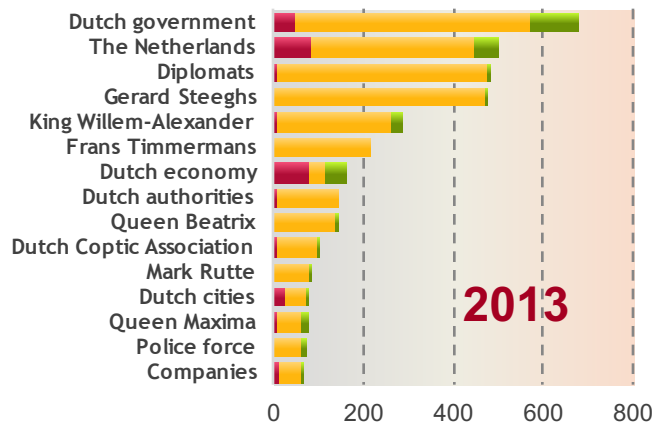
Top Dutch protagonists in Egyptian media: Statement analysis

Top protagonists of the Netherlands in Egyptian media, 2012



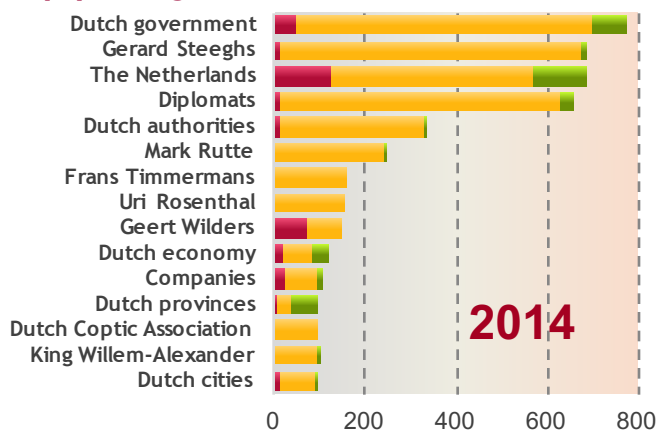
Diplomats figured prominently in coverage of Egyptian media. Ambassador Gerard Steeghs, for instance, was covered almost as intensively as Queen Beatrix. The accident of Prince Johan Friso made as well headlines in Egypt. Business played a minor role.

Top protagonists of the Netherlands in Egyptian media, 2013



The media covered the accession of King Willem-Alexander and the reign of his mother in a rather neutral way. Egyptian media focused more on the Dutch economy, painting a rather ambivalent picture and highlighting the a downturn in the economic cycle.

Top protagonists of the Netherlands in Egyptian media, 2014



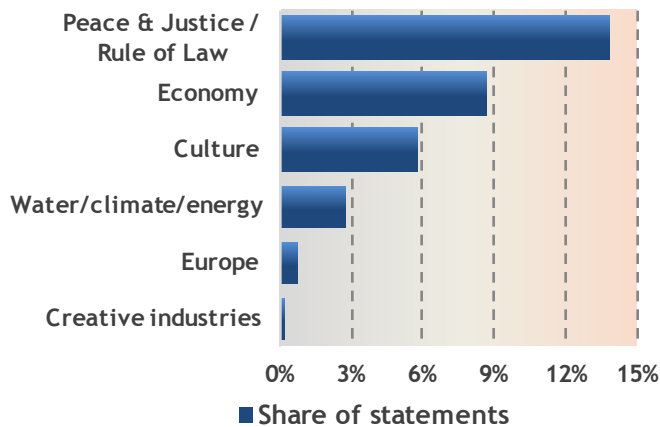
Whereas the country faced some negativity due to the bird flu, coverage of the Dutch government remained on balance positive on account of its economic, cultural and environmental activities. Geert Wilders continued to draw significant criticism.



Culture plays a minor role in Egyptian media

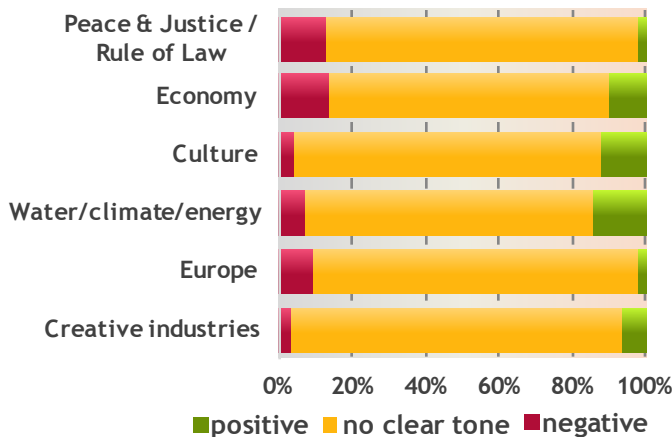
Special topics in Egyptian media 2012-2014: Salience & tone of coverage

Salience of special issues in Egyptian media, 2012-2014



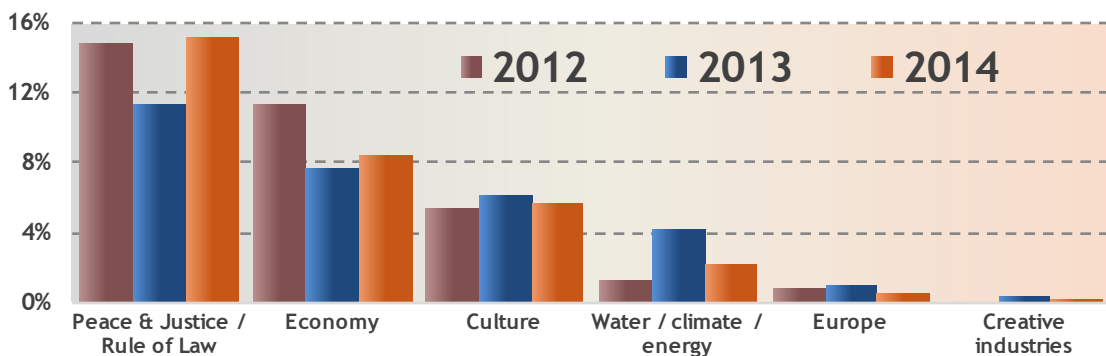
Cultural issues stood in the shadow of political and economic affairs. This is quite in line with the much lower level of cultural activities organized by Dutch organizations in Egypt, especially as the number of events declined notably from 2012 to 2014.

Tone of coverage of special issues in Egyptian media, 2012-2014



Culture and water/climate coverage was the most positive and accounts for more than half of all positive statements. Coverage of peace issues was rather negative, among others due to the controversy about “Zwarte Piet” Netherlands’ policy on asylum.

Volume / tone of coverage of the Netherlands in Egypt, 2012-2014

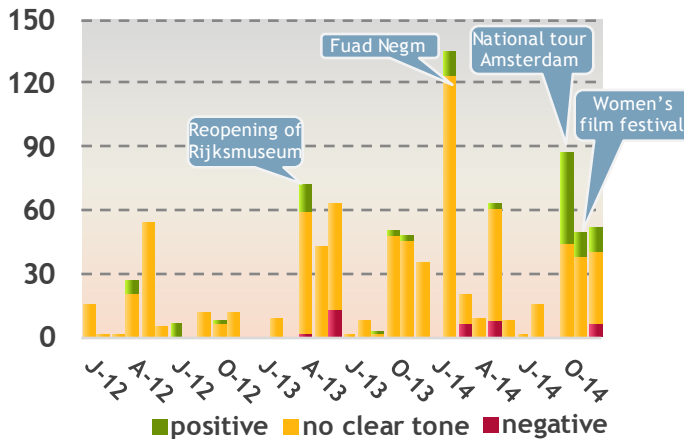




Turkish media emphasize the political dimension

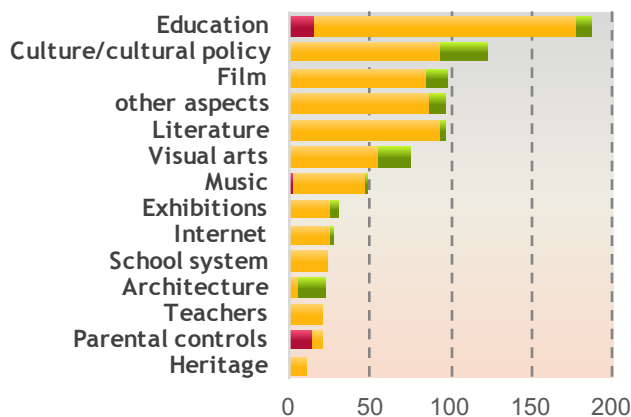
Cultural issues in Egyptian media: Statement analysis

Monthly coverage of cultural issues in Egyptian media, 2012-2014



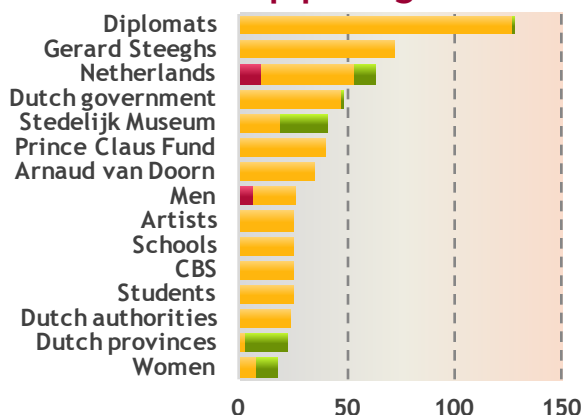
Overall coverage on cultural issues was positive for the whole analyzed period. Tonality improved notably towards the end of 2014, as the media focused more on cultural experiences in the Netherlands, like, e.g., a “national” tour through the Stedelijk Museum.

Cultural issues: Tone of coverage of topics in Egyptian media, 2012-2014



Turkish media showed a strong interest in education issues, even on mundane subjects as the ban on shorts for women in a Dutch school. Visual arts played a less prominent role as in other countries, while the Netherlands Film Festival attracted positive coverage.

Cultural issues: Top protagonists in Egyptian media, 2012-2014



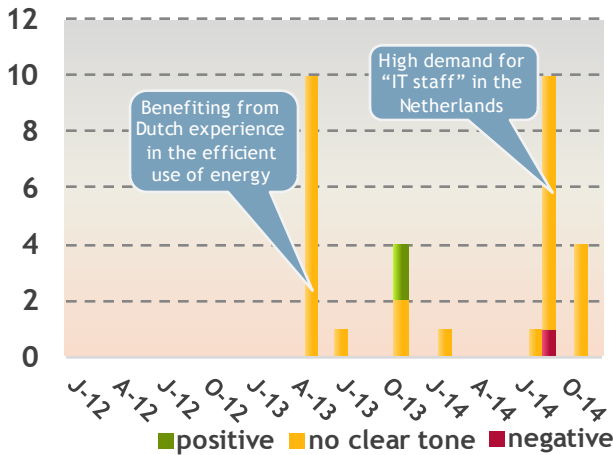
Egyptian media emphasized the political implications of cultural co-operation and covered the Dutch government and its diplomats prominently in this context. The Prince Claus Fund was covered prominently in connection with the late poet Ahmed Fouad Negm.



Creative industries barely visible in Egypt

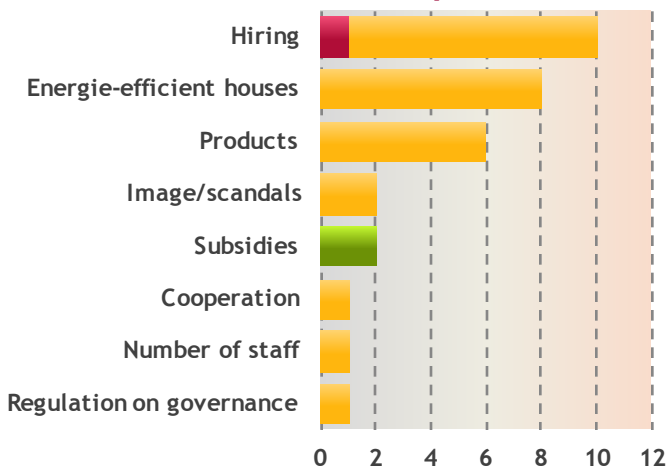
Creative industries in Egyptian media: Statement analysis

Monthly coverage of creative industries in Egyptian media, 2012-2014



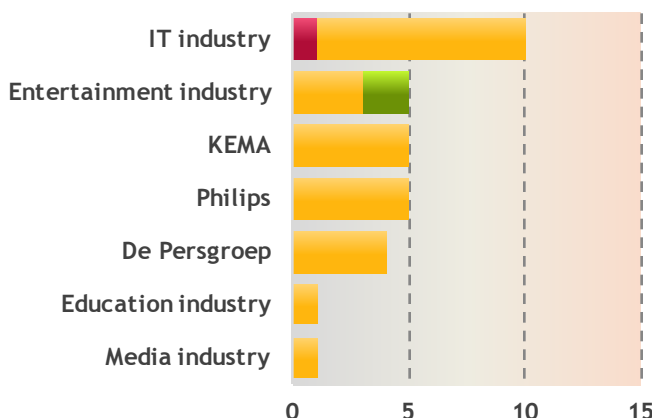
Dutch business in general played a minor role in Egyptian newspapers. Companies from the creative sector were accordingly mentioned only marginally. Some stories put the sector of creative industries in an overall gloomy context of unemployment in the Netherlands.

Creative industries: Topic structure in Egyptian media, 2012-2014



The negative tone of the few reports underlines the risk entailed by low visibility. While media in other countries highlighted the technical expertise of the Dutch creative industries and the quality of the products, these aspects played no role in Egyptian media.

Creative industries: Top protagonists in Egyptian media, 2012-2014



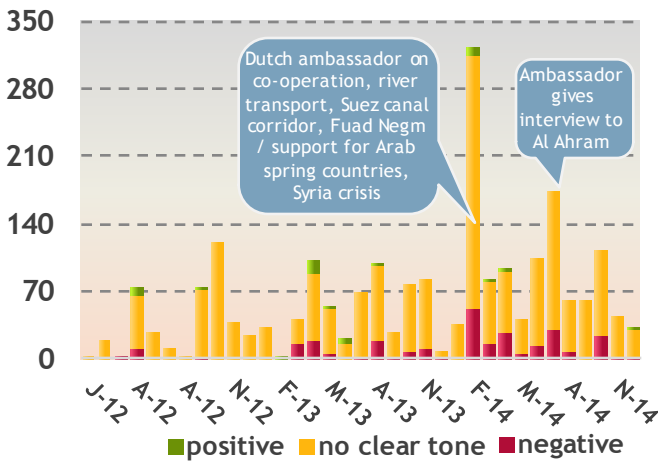
The big names of the Dutch IT and media industry were barely noted in Egyptian papers and thus could not contribute to the favorable perception of the Netherlands. **Watani** explored how Egypt might profit from Dutch expertise in energy saving.



Peace and law increasingly negative

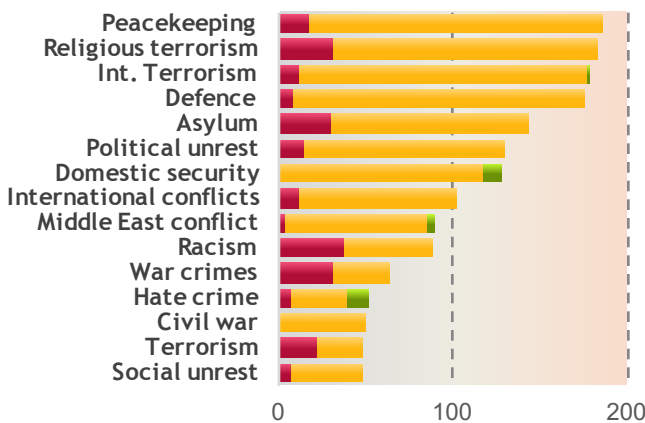
Peace and Law in Egyptian media: Statement analysis

Monthly coverage of Peace & Justice issues in Egyptian media, 2012-2014



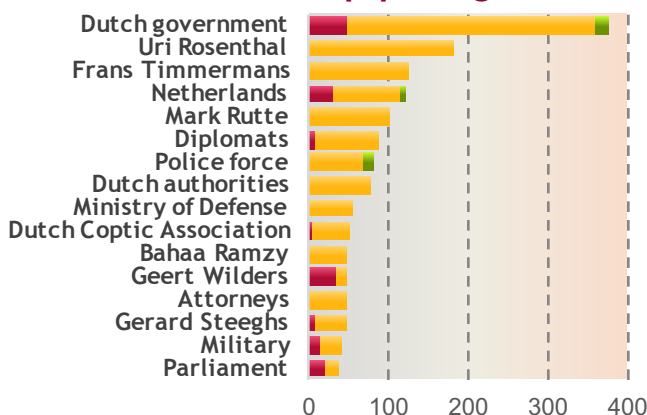
Egyptian media have focused increasingly on the international risks for the Netherlands. Dutch involvement in peacekeeping, like for instance in February 2014 in Mali, generated much coverage in Egypt. The shooting down of flight MH 17 on the other hand, was less prominent.

Peace & Justice: Tone of coverage of topics in Egypt, 2012-2014



The whole range of peace and law issues was associated with unfavorable connotations. Apart from the international crises, Egyptian media continued to criticize Dutch asylum policies and the xenophobic propaganda of Geert Wilders. The Srebrenica verdict was noted as well.

Peace & Justice : Top protagonists in Egyptian media, 2012-2014



Dutch diplomats, both active and retired were quoted prominently on world affairs - helping to balance the unfavorable global trends with neutral comment. Egyptian media did not criticize the Dutch government and its representatives openly.



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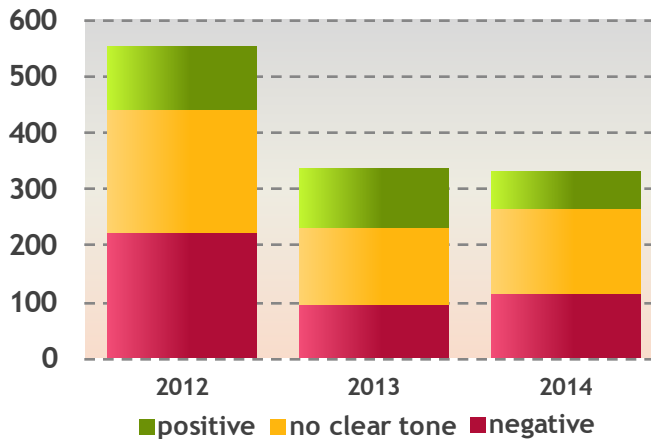
Media Set 92



Government crisis drove awareness in 2012

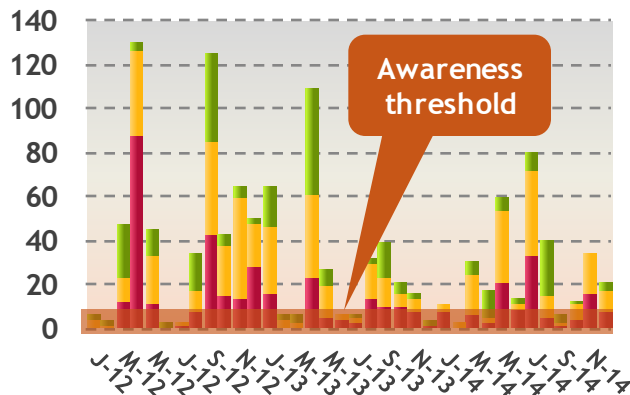
The Netherlands in German TV news 2012-2014: report analysis

Volume and tone of coverage of the Netherlands, German TV, 2012-2014



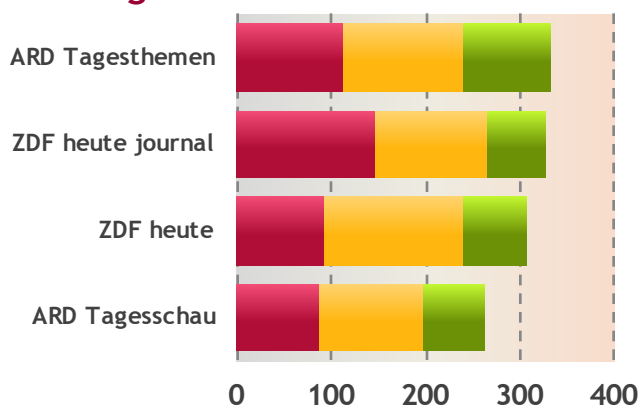
German TV news reports more intensively on foreign countries than the news from the U.S. or South Africa. However, **ARD** and **ZDF** TV news do not report about the Netherlands in an ongoing way. Classical factors, like conflict, shape the news selection.

Monthly coverage of the Netherlands, German TV, 2012-2014



A few events stand out in the media image of the Netherlands on German screens: the breakdown of the government and elections in 2012, the inauguration of King Willem-Alexander in 2013 and the shooting down of flight MH17 in July 2014.

Coverage of the Netherlands in German TV news, 2012-2014



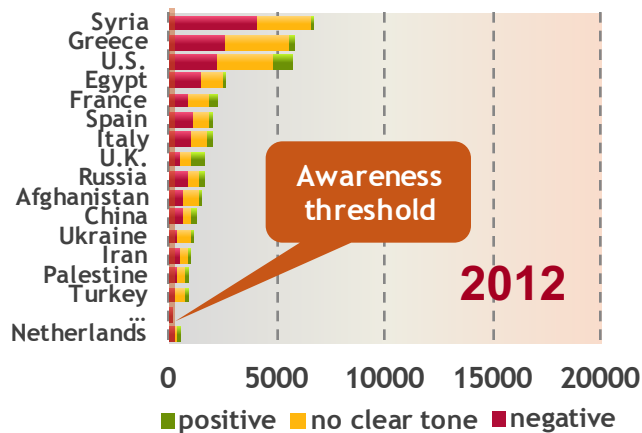
The later news programs from the public broadcasters report more intensively than the prime-time news programs. This is another indicator that events in the Netherlands have not been deemed as newsworthy as developments in other countries.



Cultural proximity is no guarantee for reporting

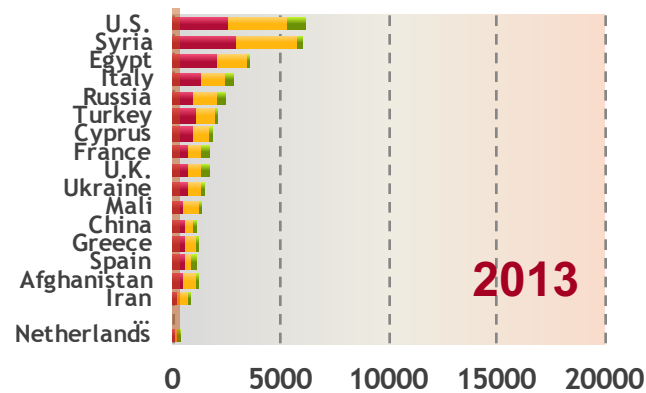
Visibility of the Netherlands: report analysis

Volume and tone of coverage on foreign countries on German TV, 2012



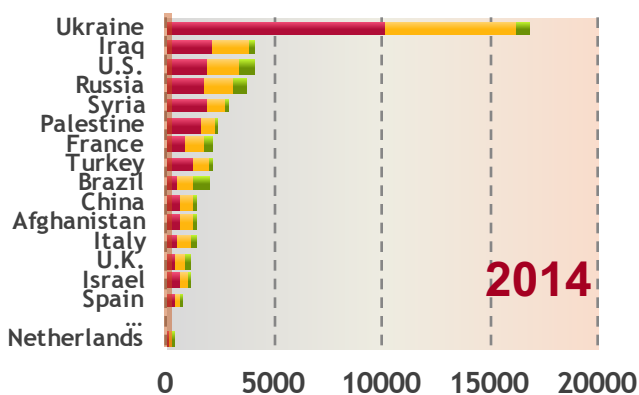
44% of all reports about protagonists in foreign news has been negative on German TV news over the course of the three years from 2012-2014, either with explicit criticism or by describing unfavorable circumstances, like, for example, unemployment.

Volume and tone of coverage on foreign countries on German TV, 2013



While bad news usually receives media traction, good news needs to be generated. The bulk of good news has been related to sports - but limited to a German perspective. TV news reported even more positively on cultural issues, but these played a limited role.

Volume and tone of coverage on foreign countries on German TV, 2014



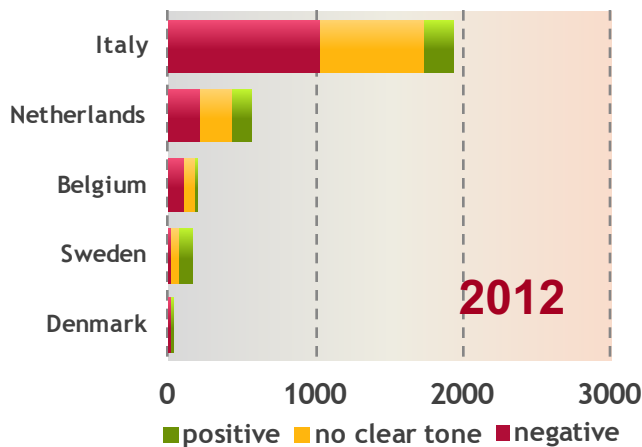
Coverage of the Netherlands on German TV has been on balance more negative in two out of three years. Even in 2013, when the succession of King Willem-Alexander led to a surplus of positive reporting, the Netherlands trailed Austria and Sweden in terms of tonality.



Netherlands profits from new monarch

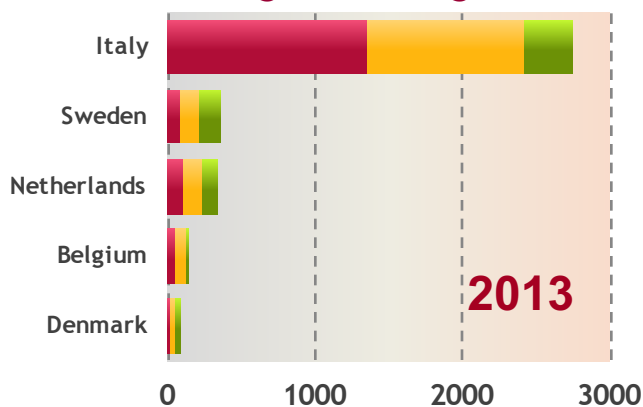
Comparison of tone of coverage of the Netherlands on German TV

Tone of coverage on foreign countries in German TV news, 2012



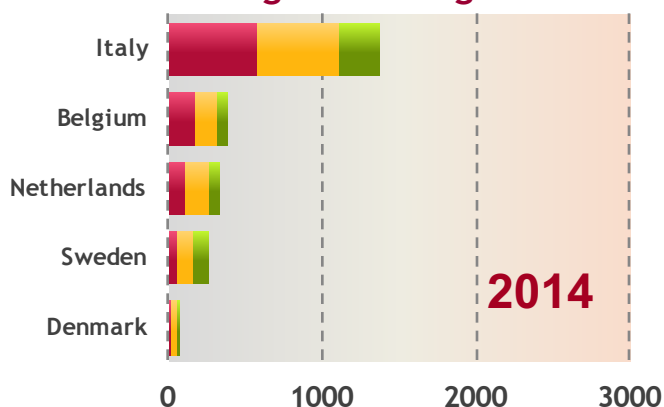
A comparison of the Netherlands with other European countries shows the limits of a theory that traces the news selection to local and cultural proximity. Italy consistently receives much more coverage than other countries that are direct neighbors of Germany.

Tone of coverage on foreign countries in German TV news, 2013



The Netherlands fares quite well with regards to awareness compared to Denmark or Belgium, but coverage decreased in 2013. Sweden profited from the Eurovision Song Contest in Malmö, whereas reporting about the 2014 ESC in Copenhagen focused on the Austrian winner.

Tone of coverage on foreign countries in German TV news, 2014



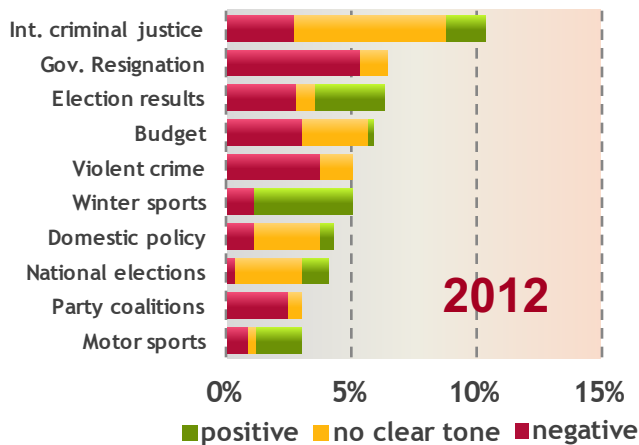
Political scandals, organized crime, the Costa Concordia shipwreck, natural disasters and the first waves of the refugee crisis: all these issues contribute to a markedly negative media image of Italy. The election of Matteo Renzi in 2014 led to a limited improvement.



ICC court shines a spotlight on the Hague

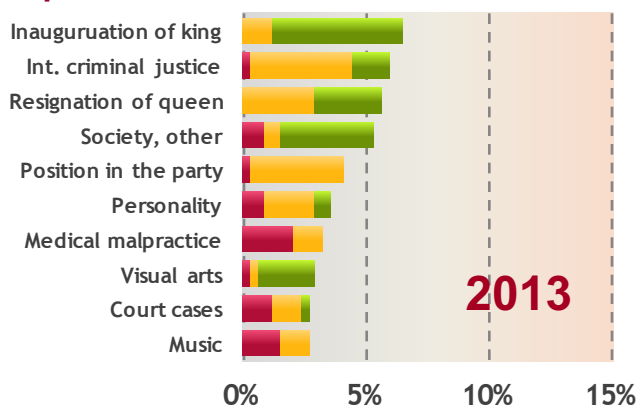
Topics of the Netherlands on German TV: report analysis

Topics of the Netherlands on German TV news, 2012



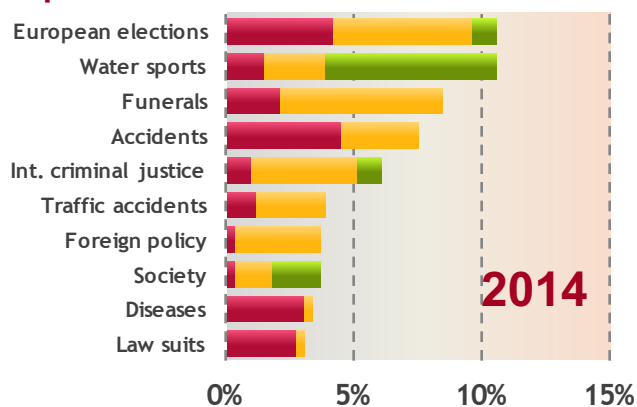
The work of the International Criminal Court in the Hague contributes strongly to the perception of the Netherlands as a champion of international political co-operation - although it is not a Dutch institution. German TV reported intensively on the political crisis in 2012.

Topics of the Netherlands on German TV news, 2013



German TV caters to the fondness of Germans for monarchs - but this primarily benefits the U.K. Although reporting on the Dutch royals was very positive, there always remains some scope for negativity, like, e.g., the criticism of the “Koningslied”.

Topics of the Netherlands on German TV news, 2014



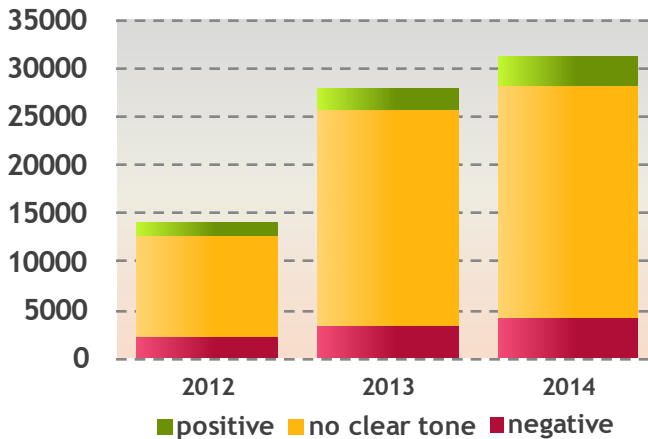
Sports news is generally positive - as it focuses on the winners. Thus German reporting about the world rowing championships in Amsterdam hailed German winners. Its impact on the positive perception of the Netherlands is limited - but contributes to visibility.



Netherlands with a sustained visibility in Germany

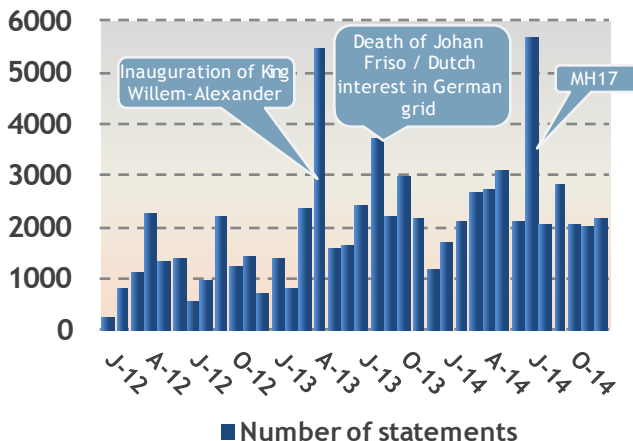
The Netherlands in German media 2012-2014: statement analysis

Volume / tone of coverage on the Netherlands, German media, 2012-2014



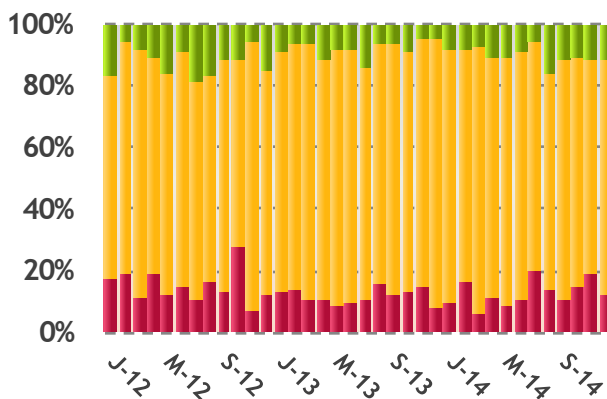
German print media report far more intensively about the Netherlands than papers from other countries. There is an ongoing presence of the country and Dutch people in German media: Media Tenor has analyzed 5,236 news stories with 74,707 statements.

Monthly coverage on the Netherlands, German media, 2012-2014



With few exceptions there has been a strong basic visibility of about 2,000 statements per month in Germany. Two events stand out: the inauguration of King Willem-Alexander in 2013, which generated much background reporting, and the MH17 catastrophe.

Tone of coverage on the Netherlands in German media, 2012-2014



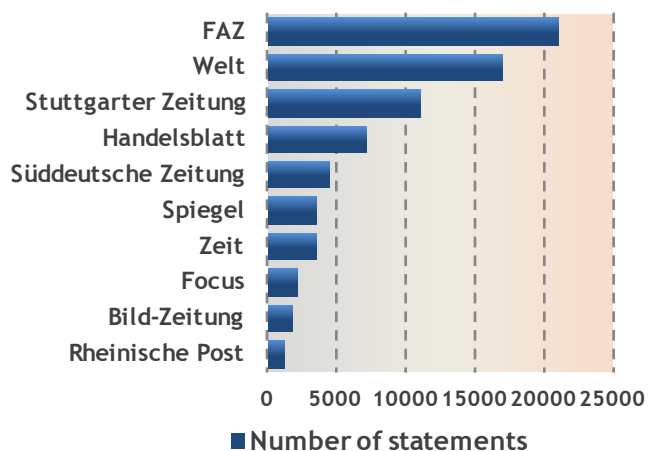
Higher volumes go hand in hand with a much more balanced, and consistent, tone of reporting. October 2012 stands out with reporting about the art theft at Kunsthal Rotterdam and the role of FARC guerilla fighter Tanja Nijmeijer in Colombian peace talks.



FAZ is the leading channel

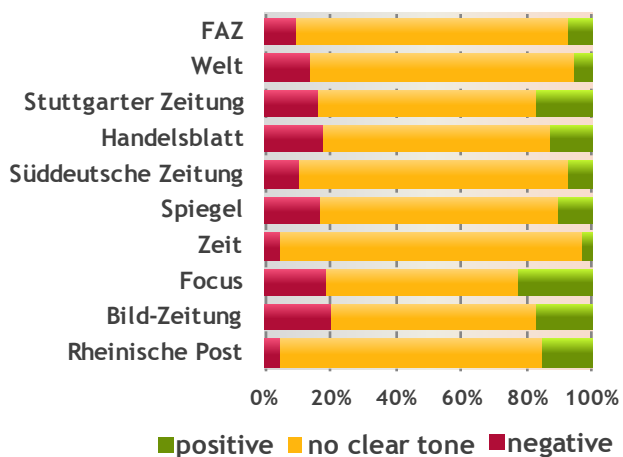
The Netherlands in German media 2012-2014: statement analysis

Volume of coverage on the Netherlands in German media, 2012-2014



FAZ, the leading conservative national daily in Germany with a strong feuilleton leads in terms of volume. Coverage in **Handelsblatt** - Germany's leading paper for a business audience - reported far less intensively, which is mainly due to the lack of an arts section.

Tone of coverage on the Netherlands in German media, 2012-2014



Differences are limited and reflect mainly the differences between general interest and business papers as well as between national and local newspapers. Local papers **Stuttgarter Zeitung** and **Rheinische Post** were only slightly more positive than the national press.

Volume / tone of coverage on the Netherlands, German media, 2012-2014

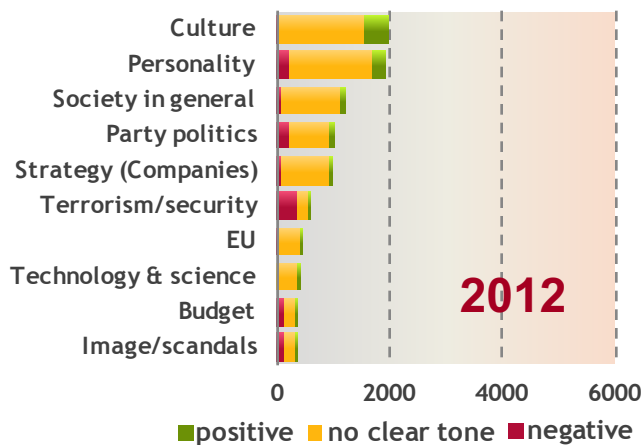




Culture is prominent - but not dominant

Topic structure of the Netherlands in German media: statement analysis

Topic structure of the Netherlands in German media, 2012



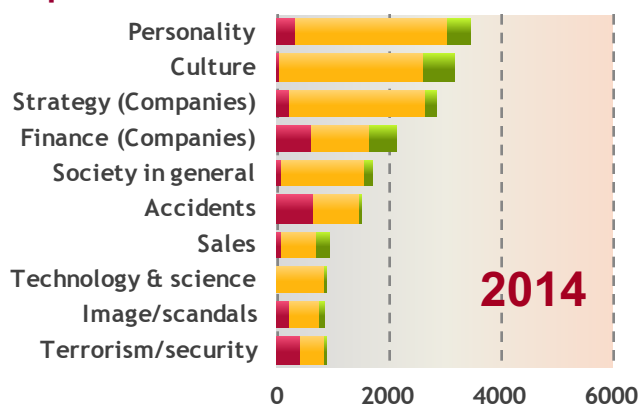
Cultural topics are the single most important positive aspect in the media coverage on the Netherlands and of Dutch protagonists in German media. But German newspapers have as well a close interest in Dutch domestic politics and social trends.

Topic structure of the Netherlands in German media, 2013



The personalities of political leaders and artists play a large role in German media, while there is no consistent focus on Dutch business. Dutch foreign policy played a minor role despite the alignment of German and Dutch interests in the European financial crisis.

Topic structure of the Netherlands in German media, 2014



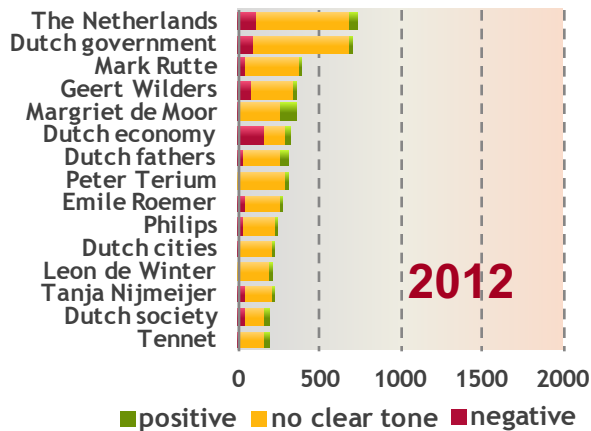
The impact of the MH17 catastrophe contributed strongly to more negative coverage of the Netherlands in 2014 - while **Handelsblatt** reported intensively about the growing difficulties at Philips. Science and technology contribute as well to a diverse image of the country.



Euro Group leader makes headlines

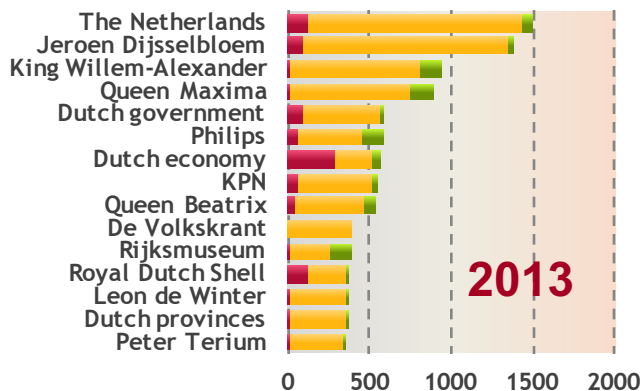
Top protagonists of the Netherlands in Germany: statement analysis

Top protagonists of the Netherlands in German media, 2012



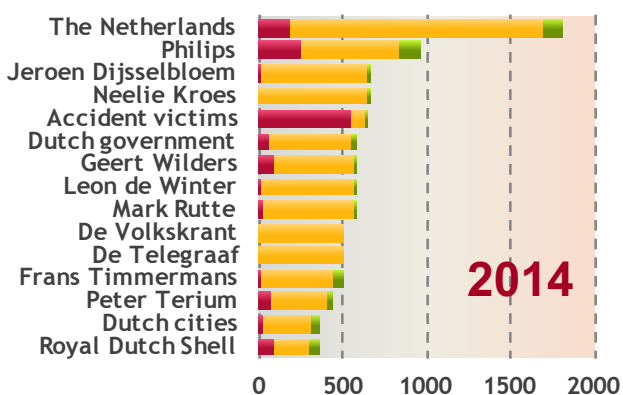
Leon de Winter is the most visible Dutch artist in German media, but this is more due to his controversial views on Islam and the fight against terrorism. De Winter has strong connections to opinion-leading German media and uses especially **Spiegel** for interviews.

Top protagonists of the Netherlands in German media, 2013



Jeroen Dijsselbloem became much more visible in the context of the European financial crisis than Prime Minister Rutte, who did not even feature among the most prominent individuals. Queen Maxima was nearly as visible as King Willem-Alexander in 2013.

Top protagonists of the Netherlands in German media, 2014



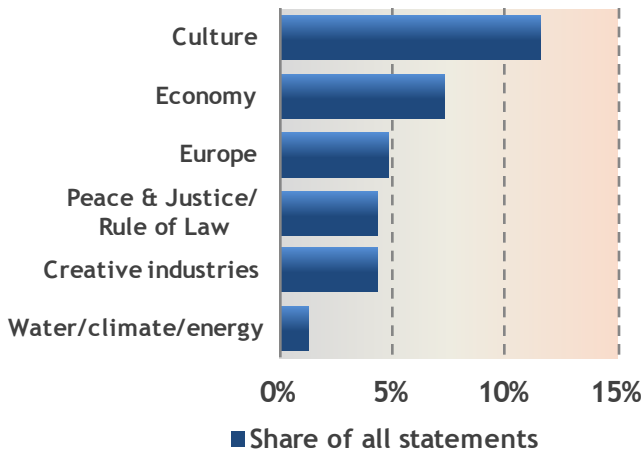
Geert Wilders resurfaced in German media, even though his political clout declined at home. With xenophobia on the rise in Eastern Germany, links to right-wing politicians in European neighbor countries has been intensively analyzed by German media.



Environment of limited interest for Germans

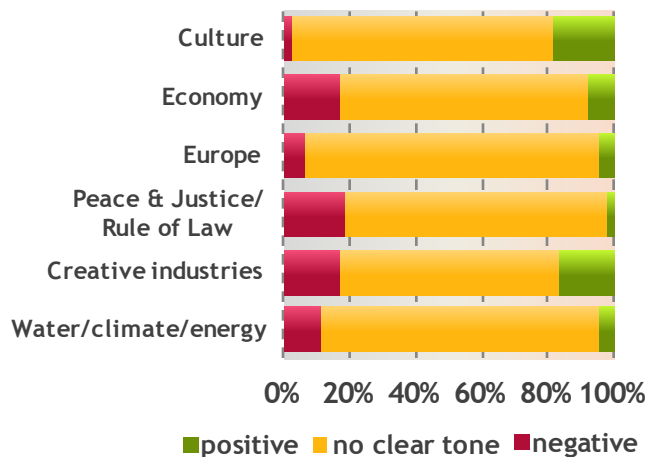
Special issues in German media 2012-2014: Salience / tone of coverage

Salience of special issues in German media, 2012-2014



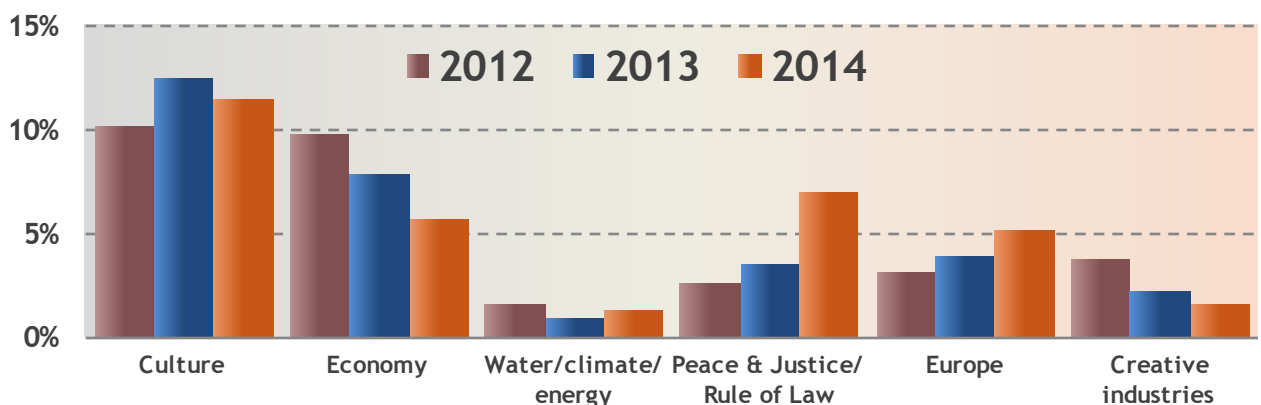
Culture and economy dominate the perception of the Netherlands in German print media. Despite Germany's preoccupation with climate protection and environmental issues and the alignment of interests in this field, water and climate issues played a marginal role.

Tone of coverage on special issues in German media, 2012-2014



Economic coverage in Germany has been characterized by alarmism over the period 2012 to 2014, widely ignoring the positive developments. Bad news from the Netherlands has been highlighted to support these views. The budget crisis in 2012 was prominent as well.

Volume / tone of coverage of the Netherlands, German media, 2012-2014

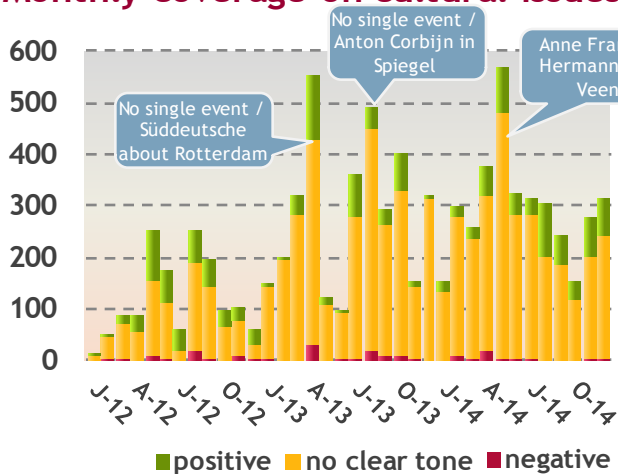




Literature ranks first - visual arts most positive

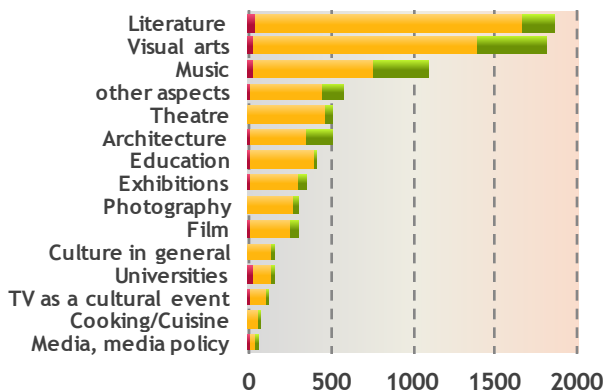
Cultural issues in German media: statement analysis

Monthly coverage on cultural issues in German media, 2012-2014



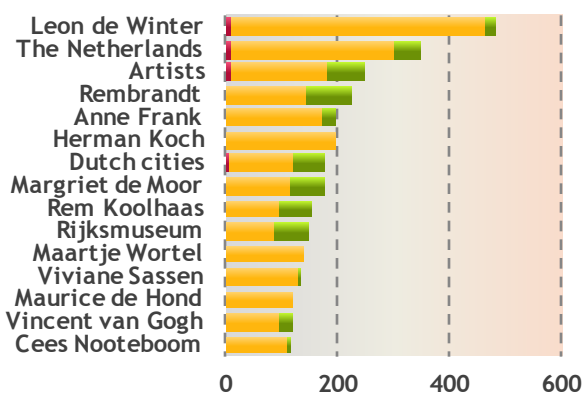
Dutch culture and Dutch artists are permanently in the news in Germany. Peak events, like, e.g., the re-opening of the Rijksmuseum in 2013 or the first performance of the Anne Frank play in 2014, received sufficient coverage in Germany to reach a wide newspaper audience.

Cultural issues: Tone of coverage on topics in German media, 2012-2014



Dutch literature, painting and music are strong components of cultural life in Germany, while contemporary arts, like, e.g. design and multi-media, play a more limited role. About 44% of all statements on cultural issues refer to the Netherlands, another 17% focus on Germany.

Cultural issues: Top protagonists in German media, 2012-2014



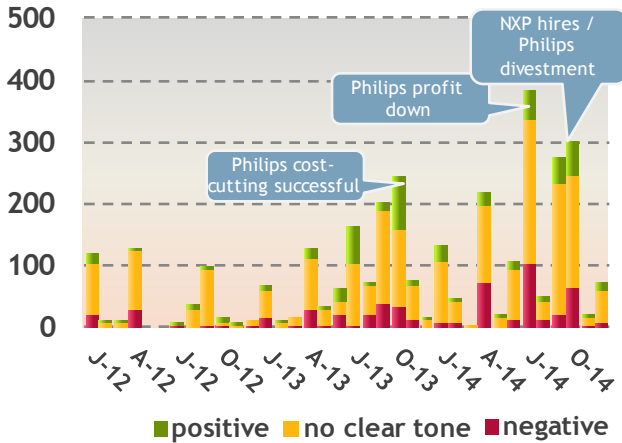
With the exception of Leon de Winter, Rembrandt is the most visible Dutch artist in German media. André Rieu did not figure among the top 15 artists in German media, which might be due to an elitist bias in German feuilletons or to the lack of references to his Dutch origin.



Philips shapes the perception of business

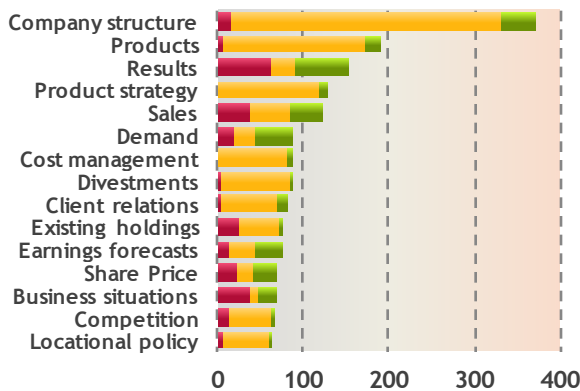
Creative industries in German media: statement analysis

Monthly coverage of creative industries in German media, 2012-2014



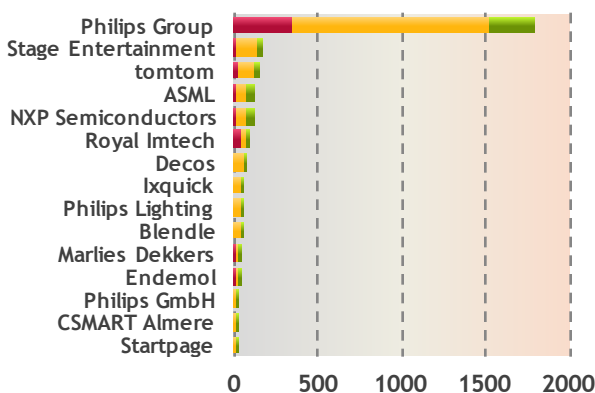
Reporting on the creative industries sector has been dominated by the focus on Philips. The restructuring of the company, which reached a new dimension with the divestment of the LED business in 2014, has led to ongoing scrutiny, especially in **Handelsblatt**.

Creative industries: Tone of coverage on topics, German media, 2012-2014



Coverage focused on strategic issues, although products were covered extensively as well. Investments and R&D, key drivers of success in creative industries, do not rank among the top issues in the media. HR, notionally a Dutch strength, played a minor role as well.

Creative industries: Top protagonists in German media, 2012-2014



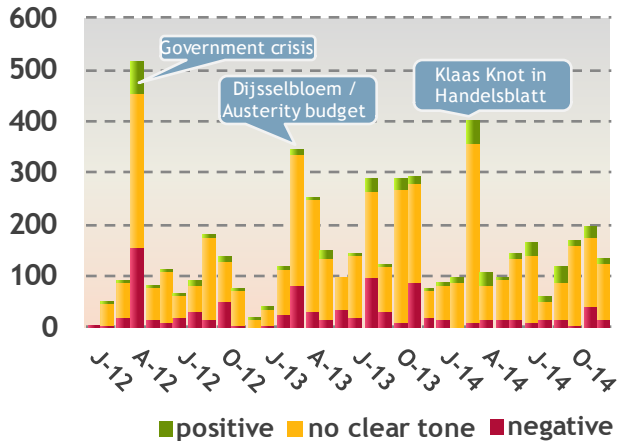
Philips is not only the most visible company from the range of creative industries, but gained the strongest overall visibility among Dutch companies in German media. Most other IT or media groups gained far less awareness.



Good news less prominent

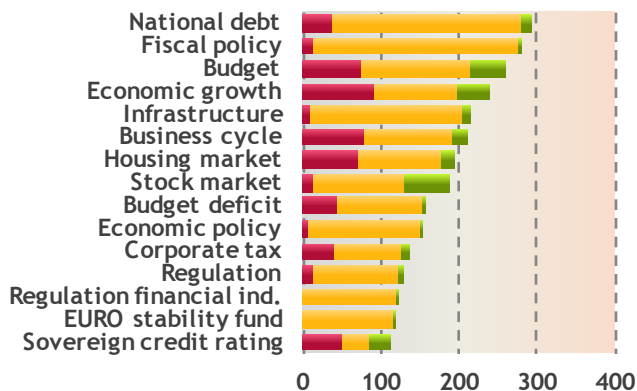
Economy in German media: statement analysis

Monthly coverage on economic issues in German media, 2012-2014



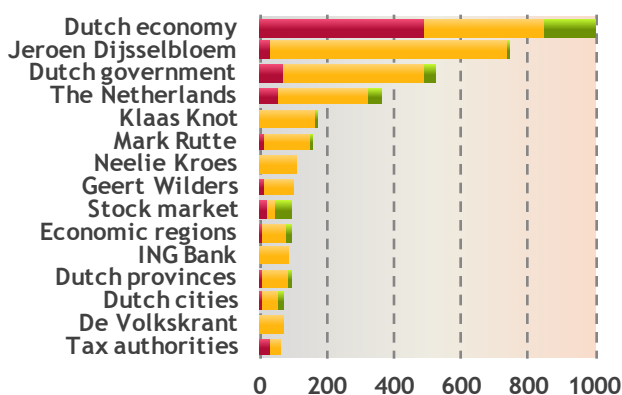
Coverage of the Dutch economy reflects the trends of domestic news: whereas negative developments get much coverage, positive trends are reported less extensively. The political implications of the budget strife in 2012 contributed to the high level of reporting.

Economic issues: Tone of coverage of topics, 2012-2014



Coverage in Germany focused mostly on budget policy and ignored the strength of Dutch economic policy, partially triggered by the EU-wide crisis. Only stock market news was positive - reflecting the bias towards “winners” in routine reports from the trading floors.

Economic issues: Top protagonists, 2012-2014



There were no “winners” in reports about the Dutch economy in the course of the three years from 2012 to 2014. EURO group leader Jeroen Dijsselbloem and other political leaders were mostly quoted in the news, but did not receive notable support from the media.



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Analysis of individual media markets

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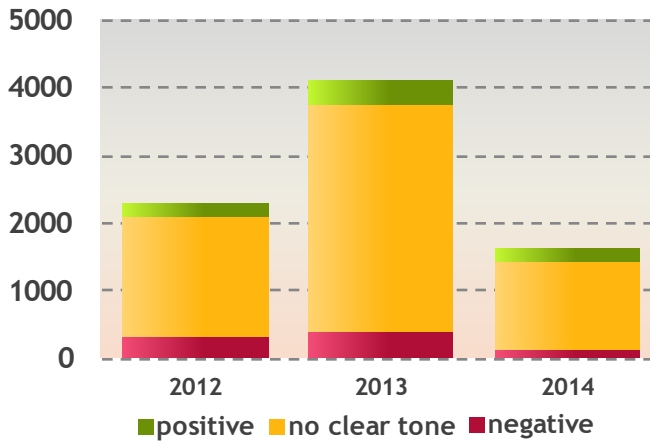
Media Set 92



Dutch-Indonesian relations highlighted in the media

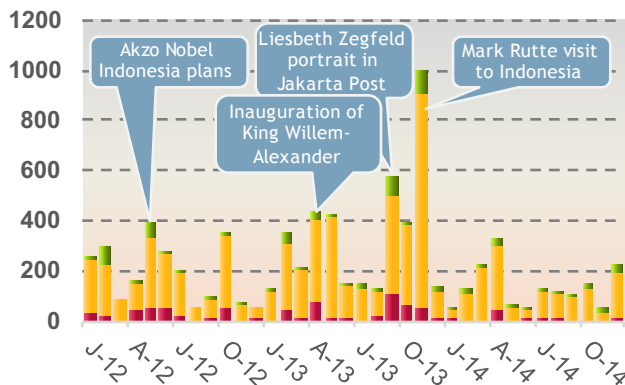
The Netherlands in Indonesian media 2012-2014: statement analysis

Volume and tone of coverage on the Netherlands, Indonesia, 2012-2014



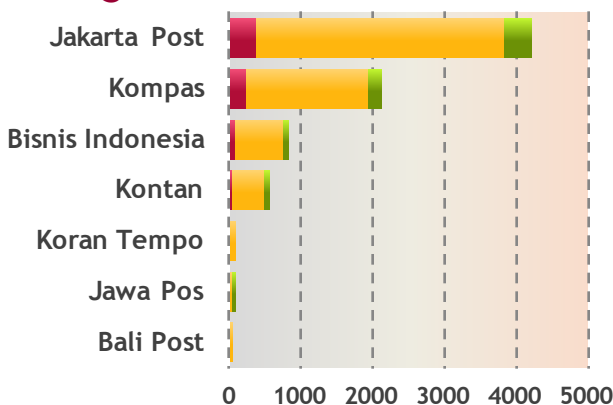
Media Tenor has analyzed 1,358 stories in 7 Indonesian opinion-leading media. These contain 7,981 statements about Dutch protagonists. Overall coverage in Indonesia is quite high, especially in 2013 due to high-ranking visits and talks about co-operation.

Monthly coverage on the Netherlands, Indonesian media, 2012-2014



Coverage peaked in the fourth quarter of 2013 due to the two countries' trade agreements between the Netherlands and Indonesia. But, the massacre of Srebrenica and the sexual abuse scandals caused negativity in September 2013.

Coverage on the Netherlands in Indonesian media, 2012-2014



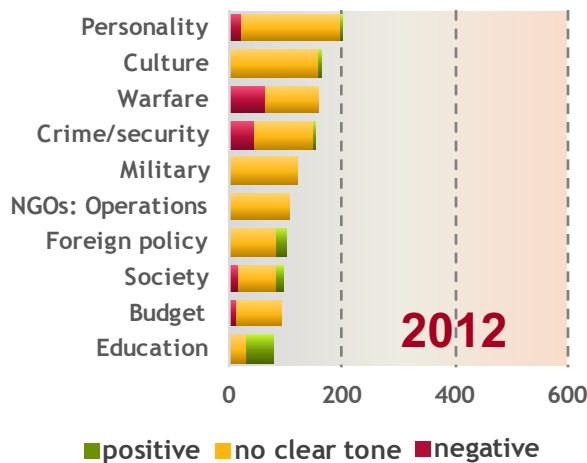
Jakarta Post surpasses the other newspapers in terms of volume. The total coverage of the six others is nearly equal with JP. JP reported mainly about diplomacy and economic issues but overall tone was balanced. Tonality was similar in the other opinion-leading media.



Diplomacy and war crimes visible in Indonesia

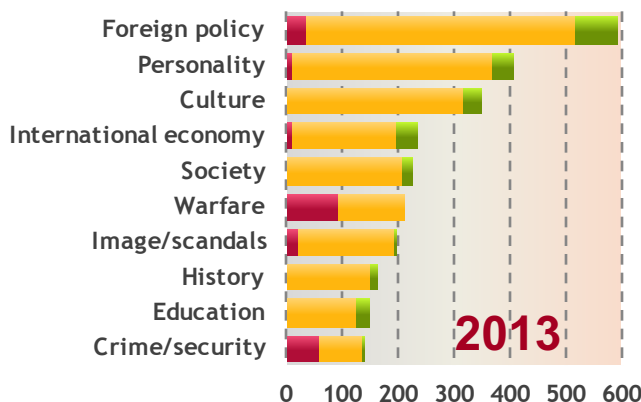
Topics on the Netherlands in Indonesian media: statement analysis

Topics on the Netherlands in Indonesian media, 2012



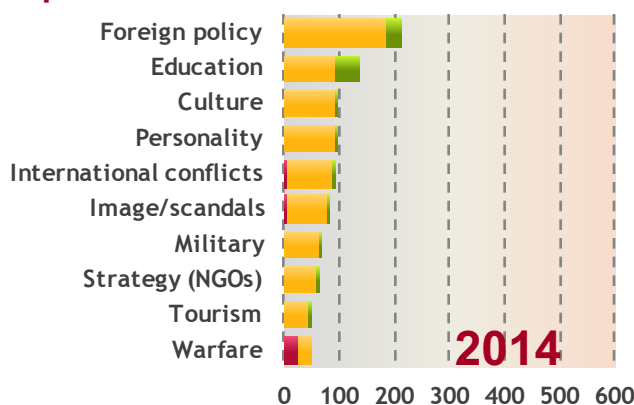
The work of Dutch NGOs in Indonesia as well as arms deals gained highest coverage in 2012. Focus also fell on drug and war crimes. But diplomatic activities and education were praised by the media. Student exchange programs were covered in a consistently positive way.

Topics on the Netherlands in Indonesian media, 2013



Diplomacy and war crimes kept attracting Indonesian media attention during 2013. Different from 2012, tonality was balanced for foreign policy. War crimes were retold with negativity and criticism. Personality of diplomats, artists and celebrities were prominent.

Topics on the Netherlands in Indonesian media, 2014



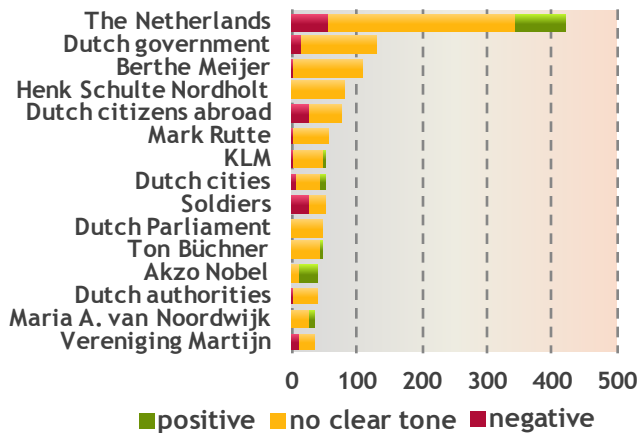
Coverage of diplomatic activities overshadowed other topics in 2014 with positive tonality. Indonesian media supported co-operation with the Netherlands. Only suspected terrorists caught by Dutch police and past war crimes stirred up concerns and criticism.



Dutch diplomats and artists portrayed favorably

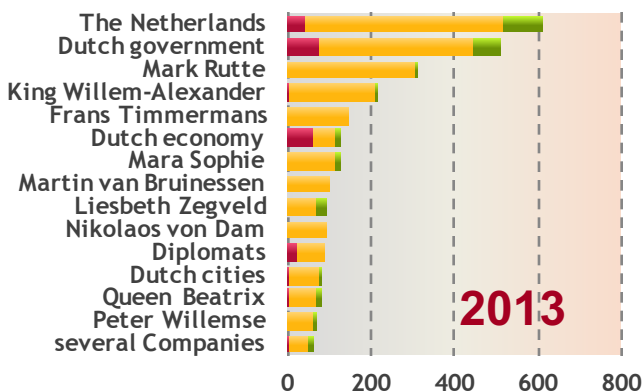
Protagonists in the Netherlands in Indonesia: statement analysis

Top protagonists in the Netherlands in Indonesian media, 2012



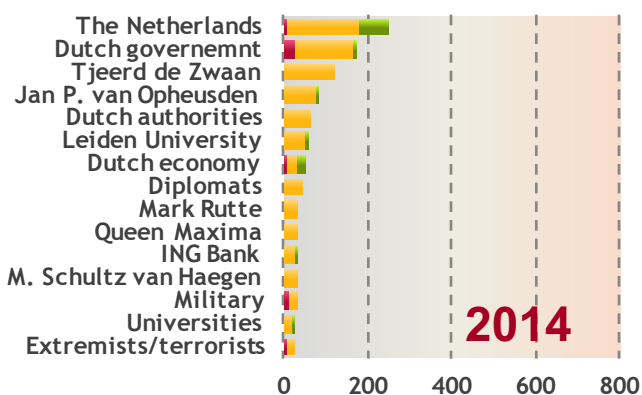
With 80 per cent of coverage, the Netherlands and its government featured in the media in all three years. Although, tonality of reporting was balanced, cultural and tourist activities in the Netherlands were highlighted. Dutch diplomats, artists and scientists emerged as prominent figures.

Top protagonists in the Netherlands in Indonesian media, 2013



Indonesian media showed an interest in Dutch royal members, diplomats, artists and scientists in 2013 — with in-depth reports. Prime Minister Mark Rutte and EU commission member, Frans Timmermans, were strongly covered following their trips to Indonesia.

Top protagonists in the Netherlands in Indonesian media, 2014



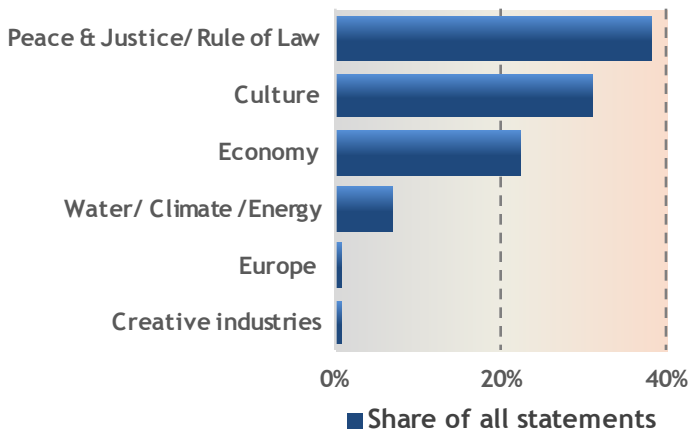
Dutch diplomats and officials were still in the top ranks in Indonesian media in 2014. Universities, especially Leiden University, became one of the top media interests due to education co-operation and the introduction of Indonesian studies by Dutch universities.



Cultural issues prominent and positive

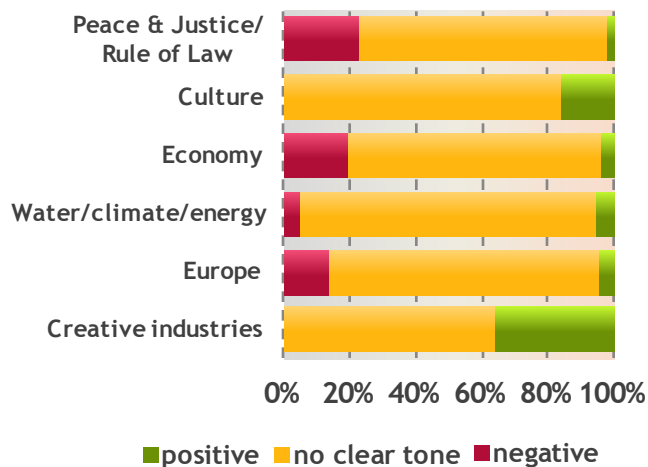
Special issues in Indonesia 2012-2014: Salience and tone of coverage

Salience of special issues in Indonesian media, 2012-2014



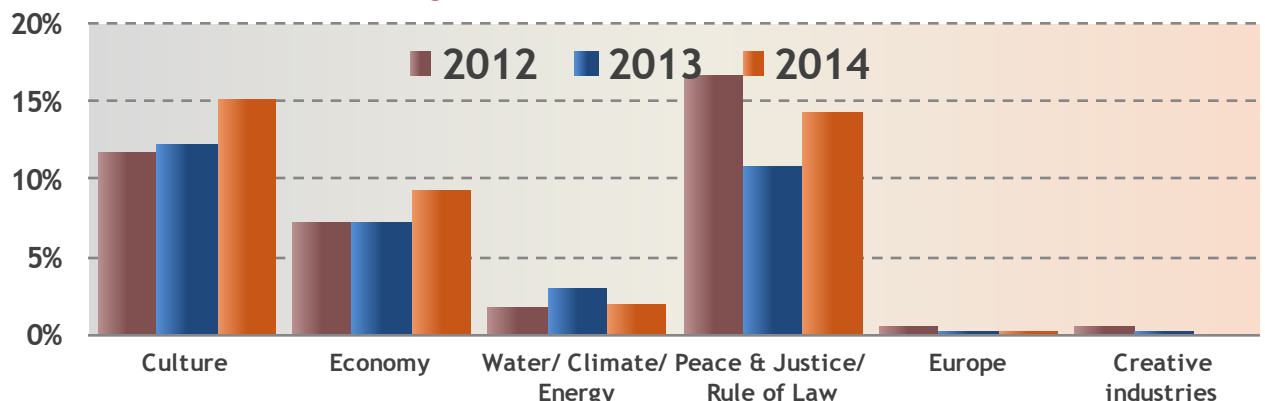
Cultural, economic and peace issues dominated media coverage on the Netherlands for the whole period of analysis. About one in three statements related to cultural or educational issues. European issues and creative industries attracted limited media attention.

Tone of coverage on special issues in Indonesian media, 2012-2014



Coverage on culture is widely positive due to interesting events. However, coverage on peace issues was rather negative in the wake of the Middle Eastern and Ukrainian crises. The economic situation of the Netherlands was perceived with some negativity due to concerns about the impact of the crisis.

Volume / tone of coverage on the Netherlands in Indonesia, 2012-2014

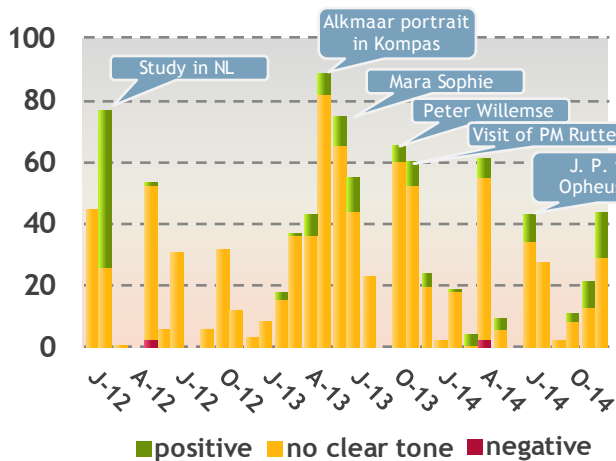




Co-operation in higher education is most prominent

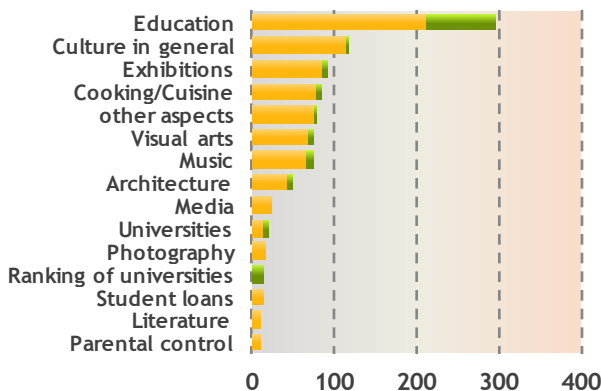
Cultural issues in Indonesian media: statement analysis

Monthly coverage on cultural issues in Indonesian media, 2012-2014



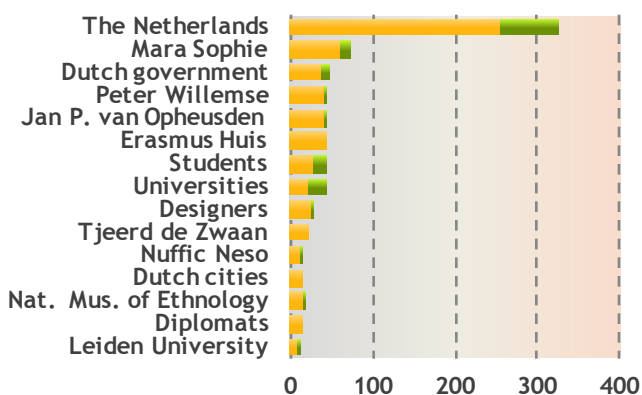
Cultural issues garnered high and steady coverage in the second half of 2013. Education co-operation, including student exchanges, was highlighted with positive comments. Furthermore, art related events were regularly covered in a positive manner by Indonesian media.

Cultural issues: Tone of coverage on topics in Indonesia, 2012-2014



While topics such as art, music and architecture were covered with high positivity, the media expressed some criticism towards issues of child protection. Indonesian media praised the quality of the Dutch education system and Dutch universities.

Cultural issues: Top protagonists in Indonesian media, 2012-2014



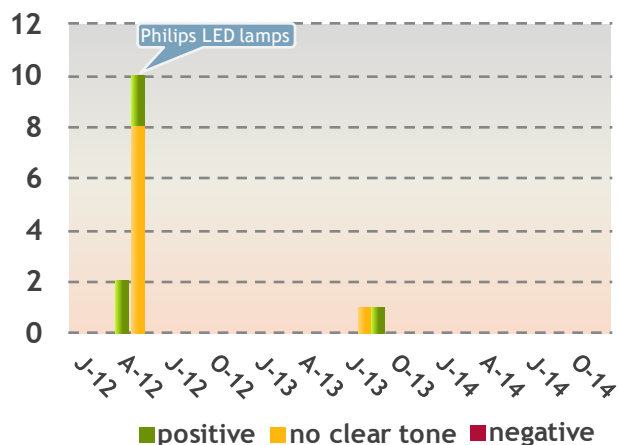
The Netherlands at large has been prominently covered in relation to cultural issues. Dutch jazz singer Mara Sophie earned favor in the media; garnering a positive image, especially after her performance in 2013. Dutch universities maintained their favorable image in the media.



Creative industries garner limited coverage

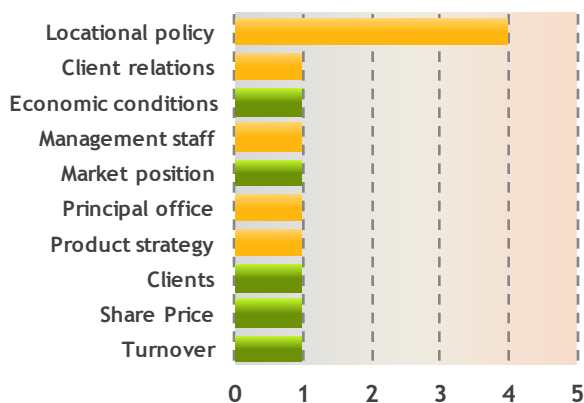
Creative industries in Indonesian media: statement analysis

Monthly coverage on creative industries in Indonesia, 2012-2014



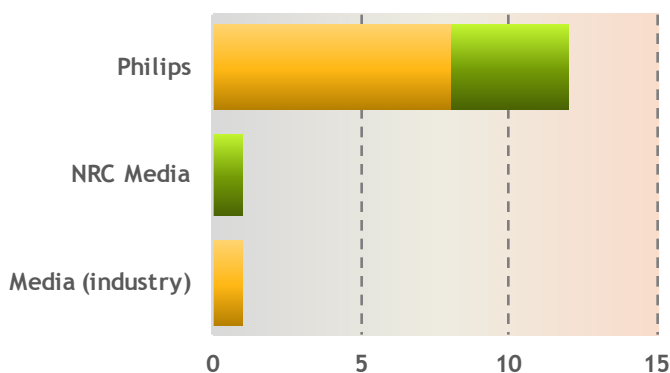
Creative industries were intermittently covered, but with a positive tonality. Dutch electronics giant, Philips, was an exception after garnering in-depth reporting. Dutch products were well received when they were introduced to Indonesia, especially in May 2012.

Creative industries: Tone of coverage on topics in Indonesia, 2012-2014



The business situations and market positions of Dutch companies were positively covered and praised by Indonesian media and analysts. Other aspects such as locational policy, product strategy, or management did not attract major attention.

Creative industries: Top protagonists in Indonesia, 2012-2014



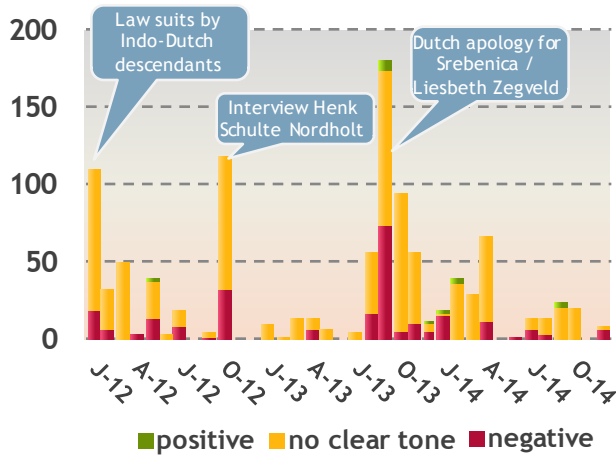
Coverage on Philips was prominent, with a few positive comments. The company's high quality products were described as very popular in Asian markets such as Indonesia. NRC Media and the Dutch media industry were also mentioned.



Srebrenica and MH17 loom over the Netherlands

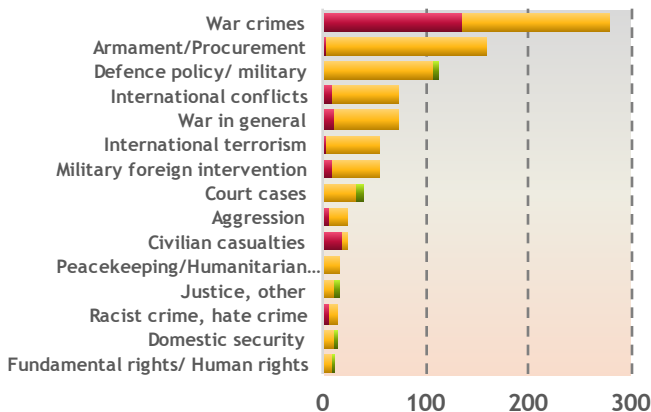
Peace & Justice/Rule of Law in Indonesian media: statement analysis

Monthly coverage on Peace & Justice/ Rule of Law, 2012-2014



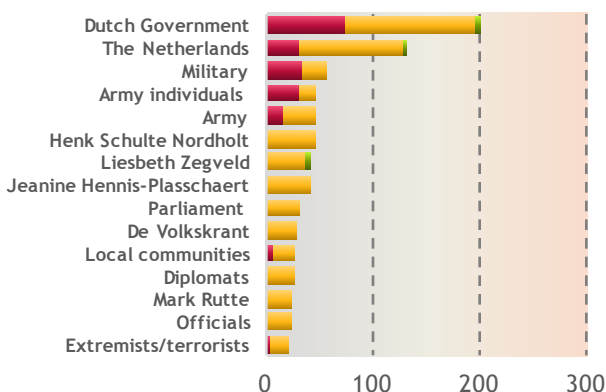
Peace and law issues played a more important role in 2013 in the wake of the increasing worldwide violence. Coverage peaked in September 2013 after Dutch peacekeepers were accused of failing to prevent the massacre of Srebrenica.

Peace & Justice/Rule of Law : Tone of coverage on topics, 2012-2014



Coverage on the Netherlands emphasized the negative side of events relating to peace and justice issues. The MH17 catastrophe and a court case against the Dutch government, in connection with the deaths of 300 people in Srebrenica, were the primary drivers of negativity.

Peace & Justice/Rule of Law : Top protagonists, 2012-2014



Due to the two appalling cases of MH17 and Srebrenica, the Netherlands, Dutch government and military became top protagonists in terms of negativity and criticism. Meanwhile, Prime Minister Mark Rutte and other diplomats made efforts in peacekeeping activities.



Agenda

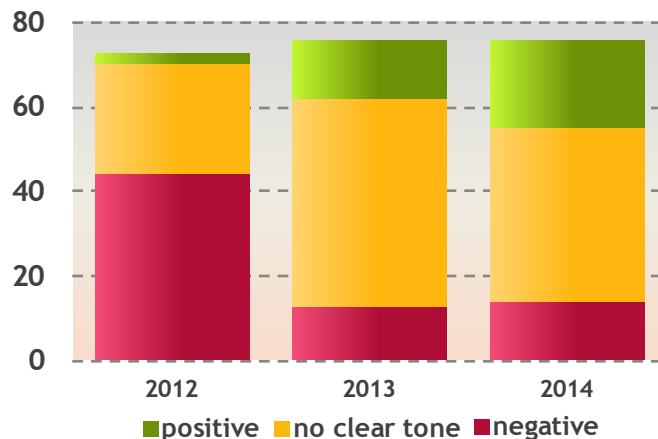
<input checked="" type="checkbox"/> Executive Summary	3
<input checked="" type="checkbox"/> International Overview	4
<i>Analysis of individual media markets</i>	
<input checked="" type="checkbox"/> Egypt	11
<input checked="" type="checkbox"/> Germany	21
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<i>Appendix</i>	
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Little coverage besides sports events

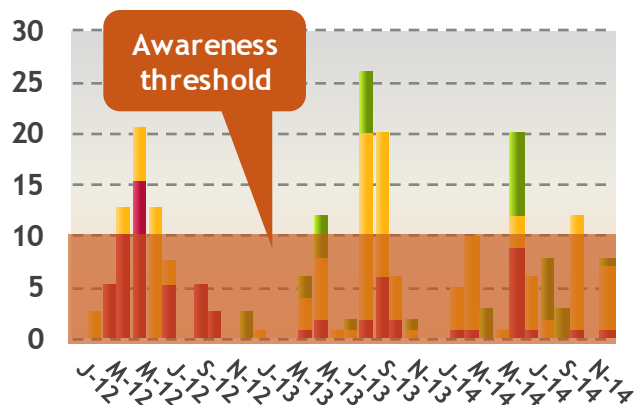
The Netherlands in Z.A. TV news 2012-2014: Report analysis

Volume and tone of coverage of the Netherlands, Z.A. TV, 2012-2014



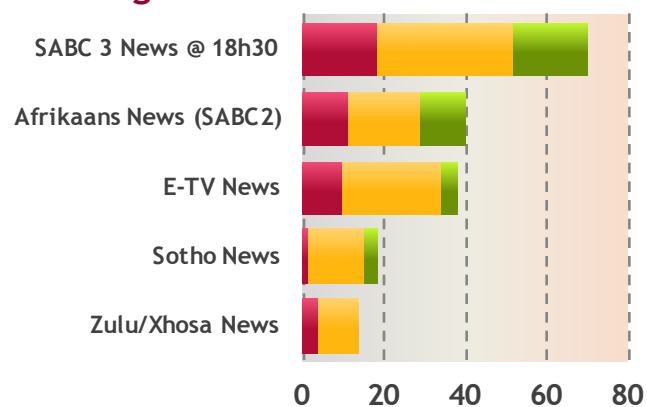
The volume of TV coverage of the Netherlands has been quite stable on Z.A. TV over the years, but was too low in most months to register with the wider audience. Tonality improved significantly after 2012 and reached a record high in 2014 - mostly due to sports.

Monthly coverage of the Netherlands, Z.A. TV, 2012-2014



Coverage of the Netherlands remained below the threshold of awareness most of the time. The exceptions are mostly big sports events, like, e.g., the world rowing championships and the cricket match with South Africa in 2013 or the hockey world cup 2014 in the Hague.

Coverage of the Netherlands in Z.A. TV news, 2012-2014



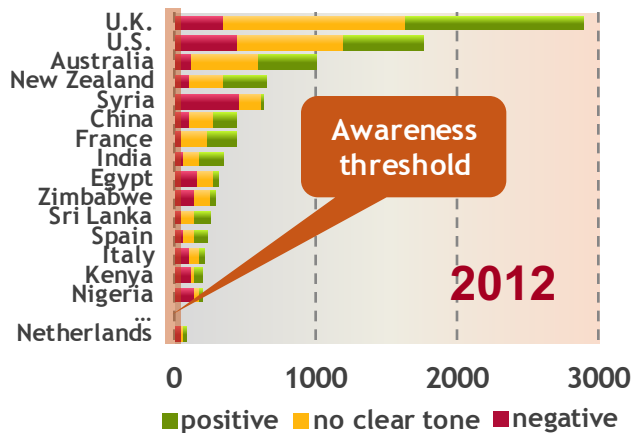
The national English-language program of the national broadcaster SABC reported most intensively about the Netherlands, while the Afrikaans news program, which is the same length, did report less intensively on the same level as the private E-TV station.



Netherlands loses clout in South Africa

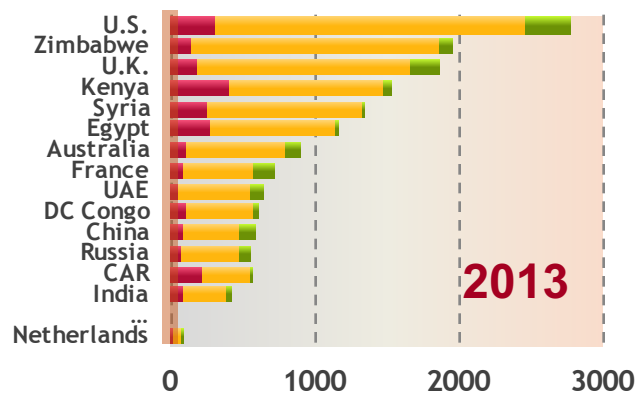
Visibility of the Netherlands: Number of reports on Z.A. TV

Volume and tone of coverage of foreign countries on Z.A. TV, 2012



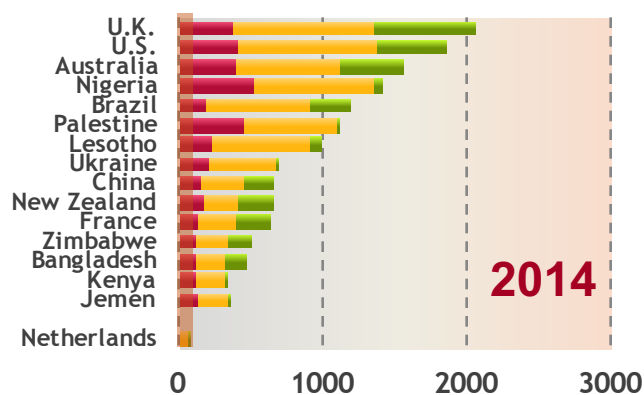
The Netherlands did not feature very prominently in South African news as might have been expected considering the historical connection between the Netherlands and South Africa. ZA TV focuses mainly on the U.K. and the U.S. in foreign news.

Volume and tone of coverage of foreign countries on Z.A. TV, 2013



Next to the U.K. France was the only West European country that featured among the top ten locations in ZA TV news, while most other countries in the region were covered only intermittently. The Netherlands remained below the awareness threshold for the entire period.

Volume and tone of coverage of foreign countries on Z.A. TV, 2014



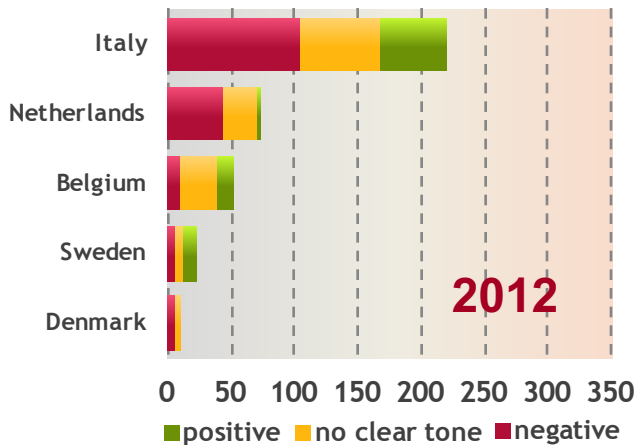
Coverage of the Netherland was almost balanced in 2013 - quite in line with the image of other West European and Scandinavian countries. Most nations are not covered systematically on South African TV and thus are always at risk from the impact of freak events.



ZA TV positive on European countries in 2012

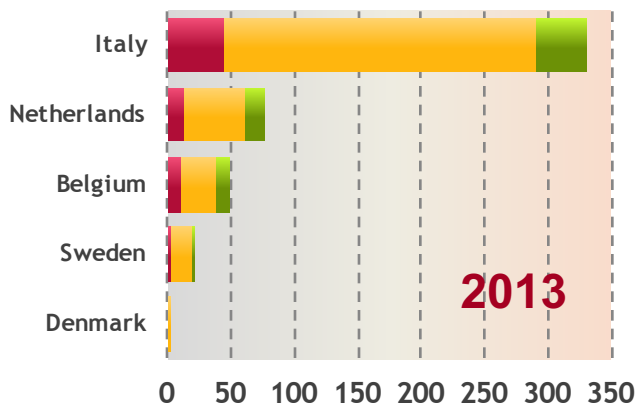
Tone of coverage of the Netherlands on Z.A. TV in comparison

Tone of coverage on foreign countries in Z.A. TV news, 2012



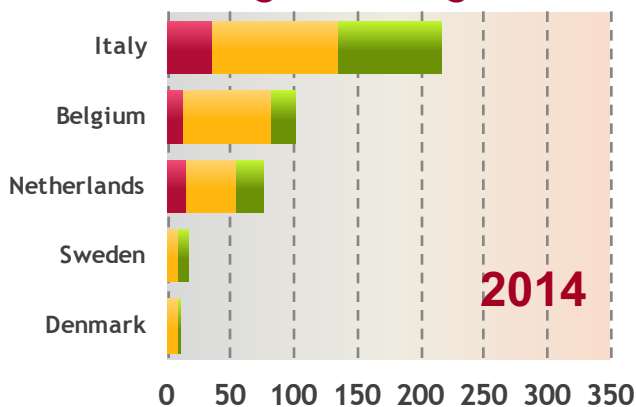
On a low level of reporting, the topic structure becomes erratic, as TV news tends to focus on crime and accidents even in those countries that do not rank among the war zones of the world. The negative coverage in 2012 related to the ICC, not to Dutch protagonists.

Tone of coverage on foreign countries in Z.A. TV news, 2013



Belgium vied with the Netherlands for visibility. It benefited to some extent from the fact that many EU institutions are based in the country. This effect became stronger in 2014, when European institutions became more prominent in the wake of the Ukraine crisis.

Tone of coverage on foreign countries in Z.A. TV news, 2014



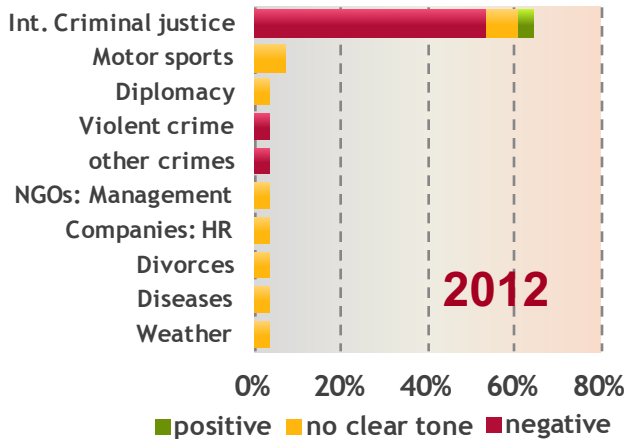
Italy has been covered more positively in 2014 than before - mostly on account of sports news. Reporting about the Netherlands included very little of the shooting down of flight MH17 as ZA TV showed only limited interest in the whole Ukraine crisis.



Sports and crime are key image drivers

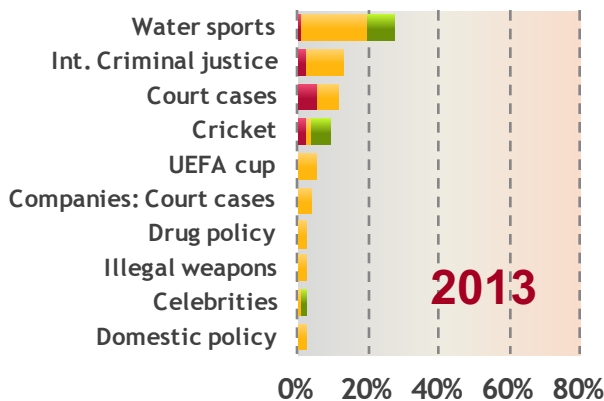
Topics of the Netherlands on Z.A. TV: Report analysis

Topics of the Netherlands in Z.A. TV news, 2012



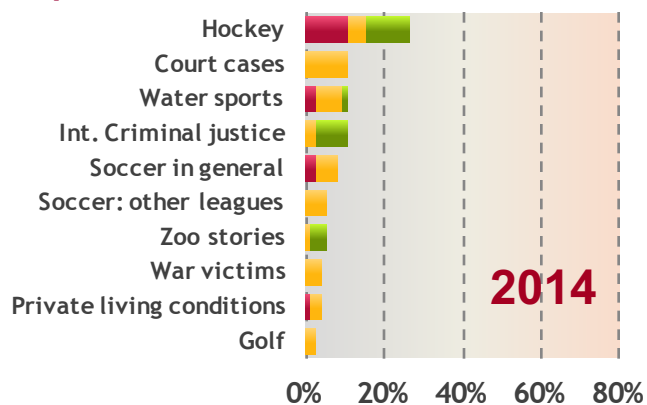
The case against Joseph Kony, the former leader of the “Lord’s Resistance Army” that was promoted through a viral video especially in African countries, shone a negative spotlight on the work of the International Criminal Court. There were almost no positive stories in 2012.

Topics of the Netherlands in Z.A. TV news, 2013



Reporting on the International Criminal Court continued on a critical note in 2013 and became more balanced only in 2014. These reports tend to underscore the role of the Netherlands as a major player with regard to Peace / Rule of Law despite the critical tone.

Topics of the Netherlands in Z.A. TV news, 2014



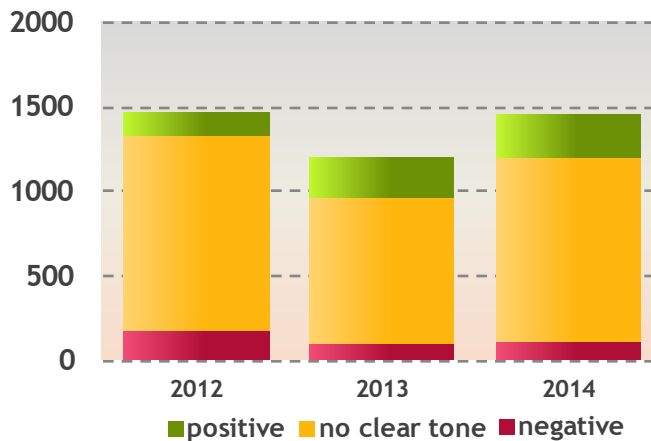
In 2014 reporting focused as strongly on a variety of sports events as in previous years. Dutch policy and Dutch culture do not play a notable role on South African TV and therefore hardly facilitate Dutch public diplomacy and international cultural policy.



Dutch image improves after 2012

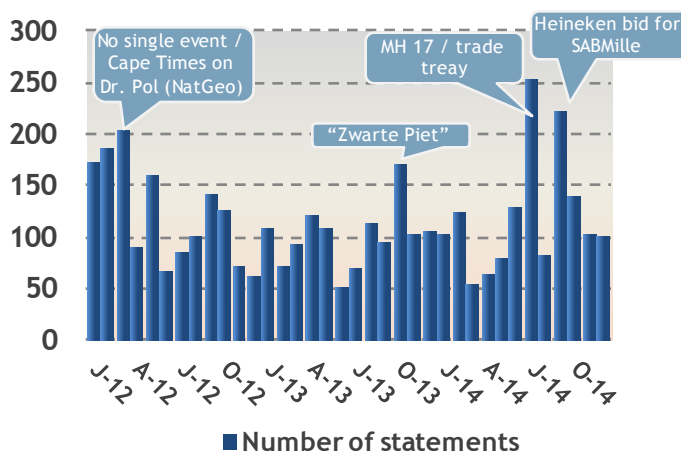
The Netherlands in Z.A. media 2012-2014: Statement analysis

Volume / tone of coverage of the Netherlands, Z.A. media, 2012-2014



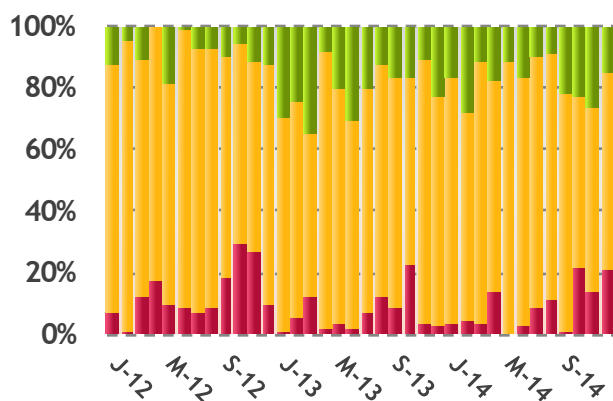
South African media have reported about the Netherlands on an ongoing basis. While a focus on crime led to a surplus of critical reporting in 2012, a change of focus in the later years led to a marked change in tonality, as the volume of coverage on culture showed a notable improvement.

Monthly coverage on the Netherlands, Z.A. media, 2012-2014



Media Tenor has analyzed 1,021 news stories with 4,121 statements on Dutch protagonists or the Netherlands in Z.A. media. While the peak in coverage in July 2014 related to the MH17 catastrophe, the September peak focused on the brewery industry.

Tone of coverage on the Netherlands in Z.A. media, 2012-2014



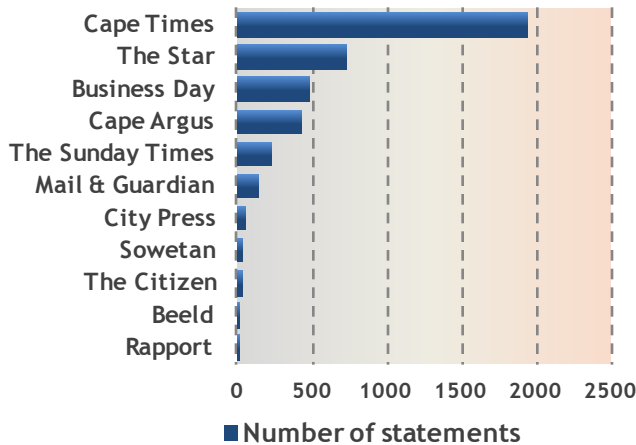
The spectacular art heist from the Rotterdam Kunsthal in October 2012 marks the highest level of negativity in Z.A. for the whole period. But the significant increase of positive reporting late in 2012 had a greater impact on media image.



Cape Times is the primary South African platform

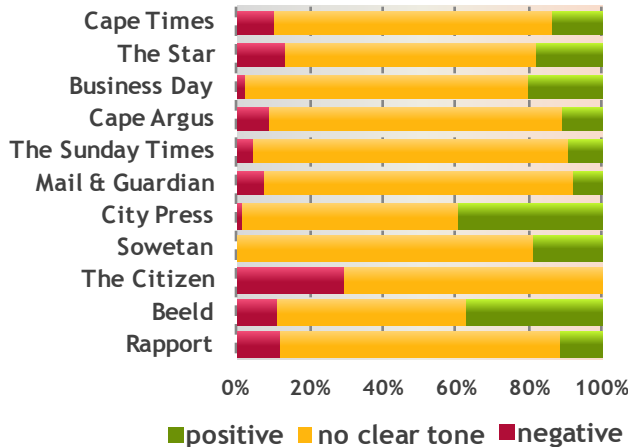
The Netherlands in Z.A. media 2012-2014: Statement analysis

Volume of coverage on the Netherlands in Z.A. media, 2012-2014



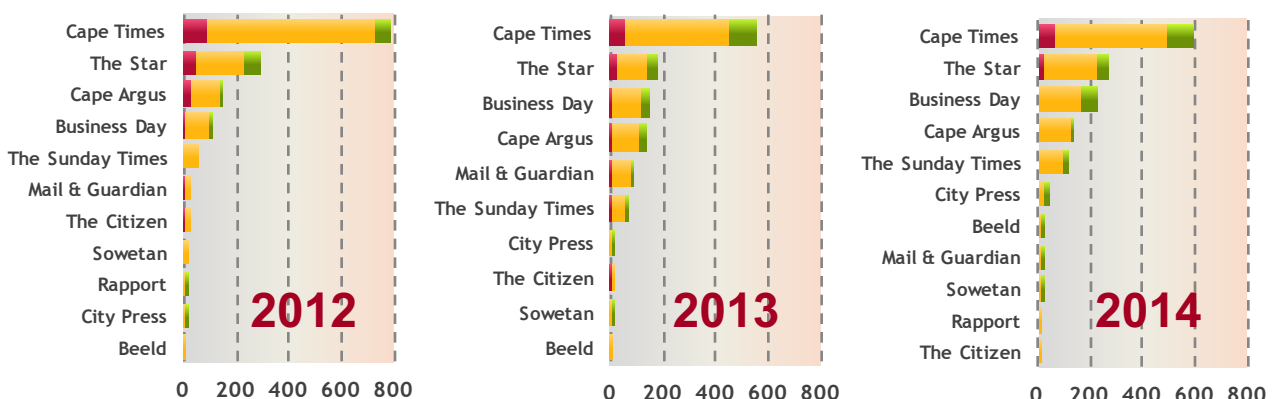
Only four papers devoted a notable share of reporting on the Netherlands. **Cape Times** stands out among the other media and contributed almost half of all statements to the analysis. The papers focused predominantly on culture, business, economy and environment

Tone of coverage on the Netherlands in Z.A. media, 2012-2014



Among the media with a notable level of reporting, **Business Day** painted the most favorable image of the Netherlands, focusing especially on DAF, KPN and the Dutch economy. Political issues played a rather limited role in all South African media.

Volume / tone of coverage on the Netherlands, Z.A. media, 2012-2014

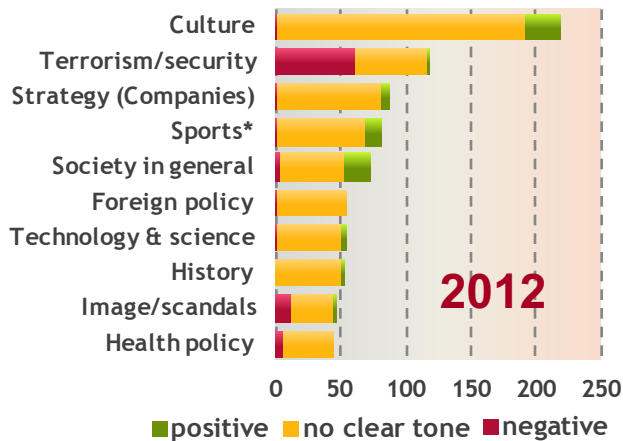




Cultural issues project a favorable image

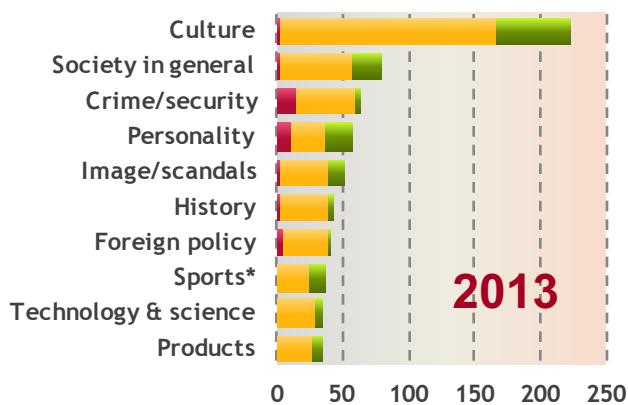
Topic structure of the Netherlands in Z.A. media: Statement analysis

Topic structure of the Netherlands in Z.A. media, 2012



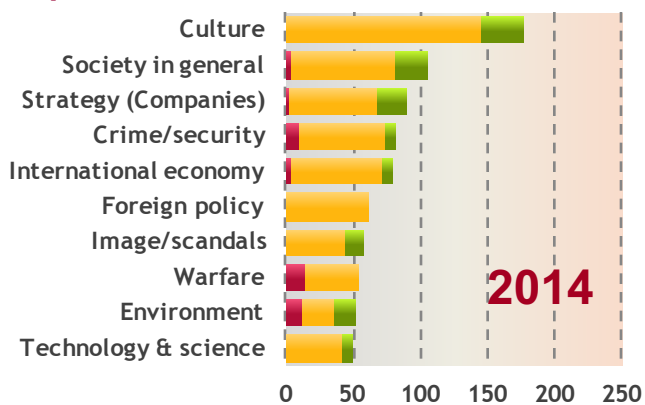
Culture was the main aspect of reporting in 2012 and 2014 and strongly contributed to the positive portrayal of the Netherlands. Sports topics were picked up more often in the news sections than in other countries - well in line with the high salience of sports on TV.

Topic structure of the Netherlands in Z.A. media, 2013



The Mars One project stood out in reports about science and technology topics, as South African media reported much more extensively about these aspects than media from other countries. Cultural issues did not rank among the top ten topics in 2013.

Topic structure of the Netherlands in Z.A. media, 2014



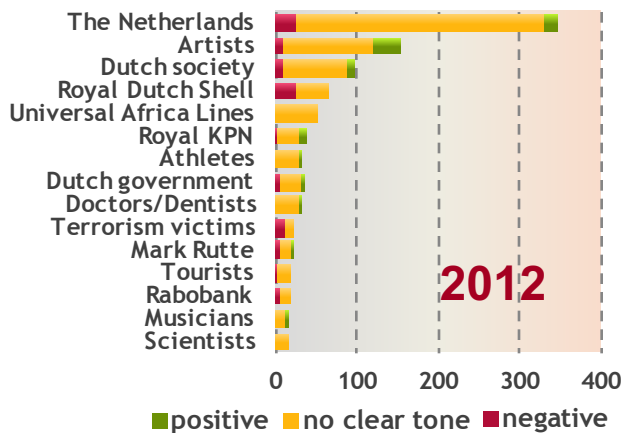
The shooting down of flight MH17 was covered less extensively in South Africa, while environmental issues were followed more closely. South African papers took a critical stance on the activities of Shell and reported on protests against the oil group.



Dutch companies play an important role

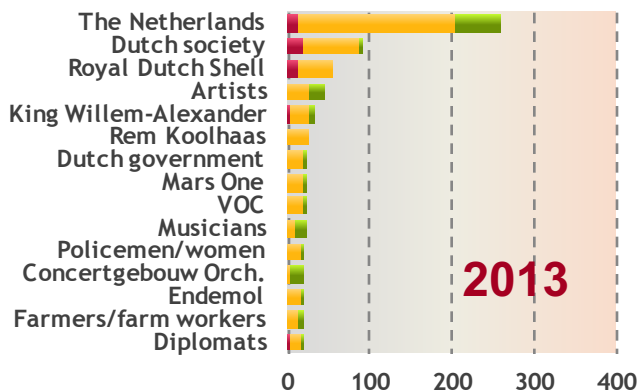
Top protagonists of the Netherlands, Z.A. media: Statement analysis

Top protagonists of the Netherlands in Z.A. media, 2012



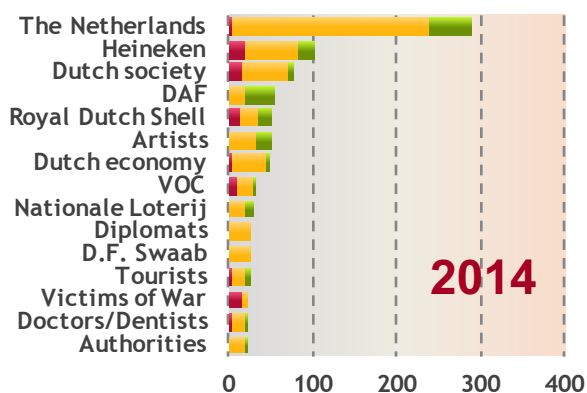
The limited interest in Dutch politics is evident from the low level of reporting on Prime Minister Rutte during a year of political upheaval. In the same vein, coverage of the inauguration of King Willem-Alexander was equally under-reported during 2013.

Top protagonists of the Netherlands in Z.A. media, 2013



The role of the Dutch East India Company (VOC) in the history of South Africa figured prominently in both 2013 and 2014. The assessment is clearly ambivalent, as for instance, a report from December 2014 focused on the aspect of slavery in former Dutch colonies.

Top protagonists of the Netherlands in Z.A. media, 2014



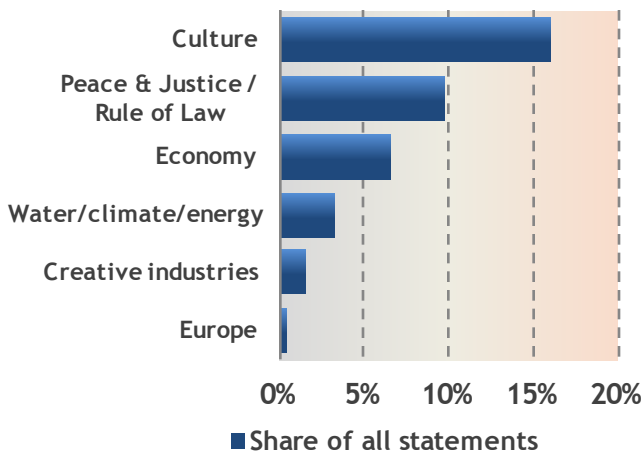
Dutch business plays a significant role in South Africa's media coverage, with a special focus on Heineken. The Dutch company is not only the third-largest brewery in the world, but launched an unsuccessful takeover bid of the South African SABMiller group.



Creative industries with positive potential

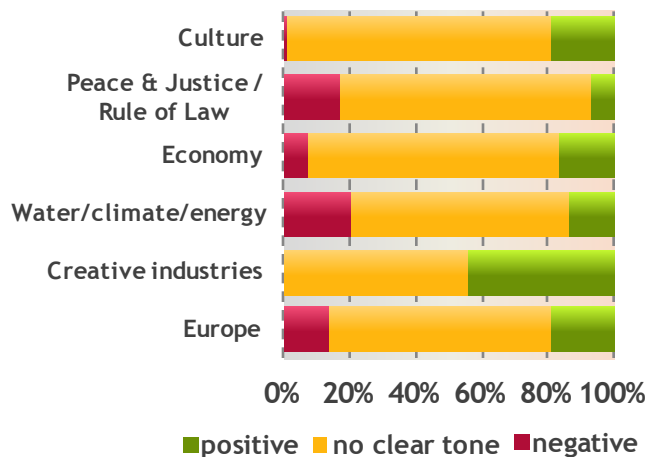
Special issues in Z.A. media 2012-2014: Salience / tone of coverage

Salience of special issues in Z.A. media, 2012-2014



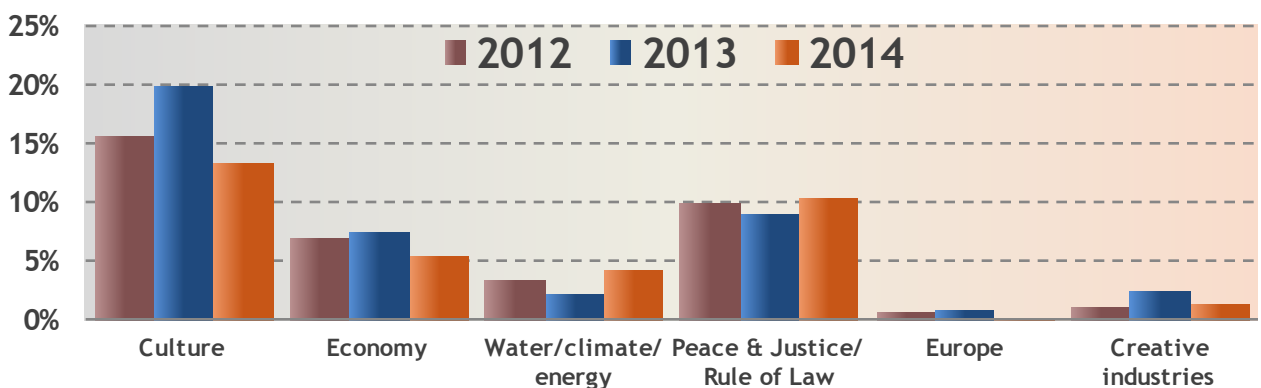
Cultural issues were the main asset in terms of salience and tonality for the perception of the Netherlands as portrayed by South African media. Creative industries on the other hand stood in the shadow of those industrial branches that have a connection with South African business.

Tone of coverage of special issues in Z.A. media, 2012-2014



Culture and creative industries have been the most positive aspects of the Dutch media image in South Africa, whereas reporting about Peace and Law issues focused on crime and terrorism. Coverage of environmental topics was ambivalent, due to the charges against Shell.

Volume / tone of coverage of the Netherlands, Z.A. media, 2012-2014

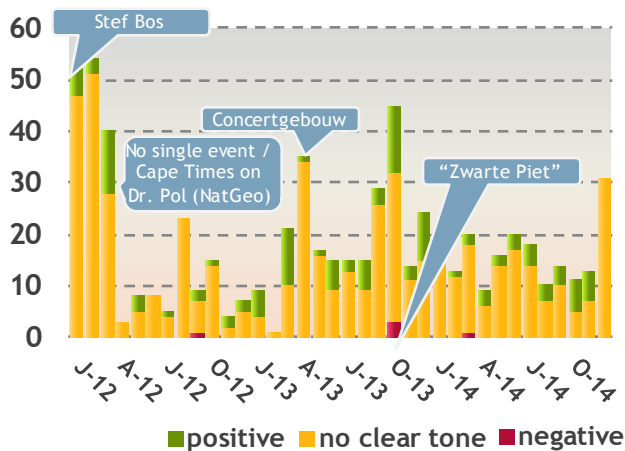




Music resonates positively with Z.A. media

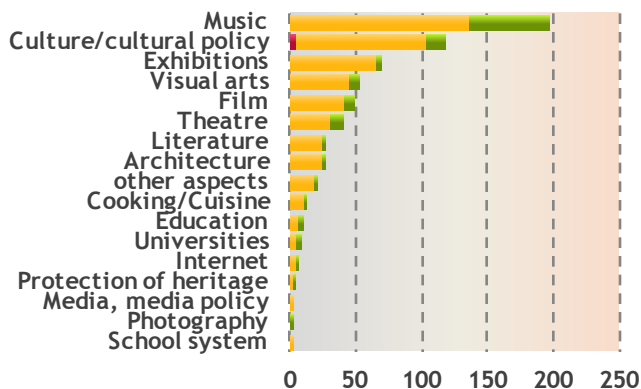
Cultural issues in Z.A. media: Statement analysis

Monthly coverage on cultural issues in Z.A. media, 2012-2014



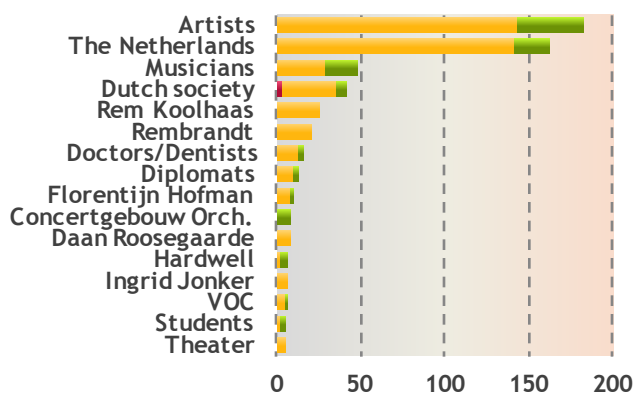
Reporting on cultural topics did not follow a clear pattern. Despite the overall positive trend the row about “Zwarte Piet” in October 2013 stands out as one of the few critical aspects in the news about the Netherlands. In the same month several musical events were positively noted.

Cultural issues: Tone of coverage of topics in Z.A. media, 2012-2014



Contrary to most of the other countries, music was the most visible and the most positively covered aspect of Dutch culture in South African media, while visual arts and exhibitions were less prominent. Education topics played only a minor role in South African media.

Cultural issues: Top protagonists in Z.A. media, 2012-2014



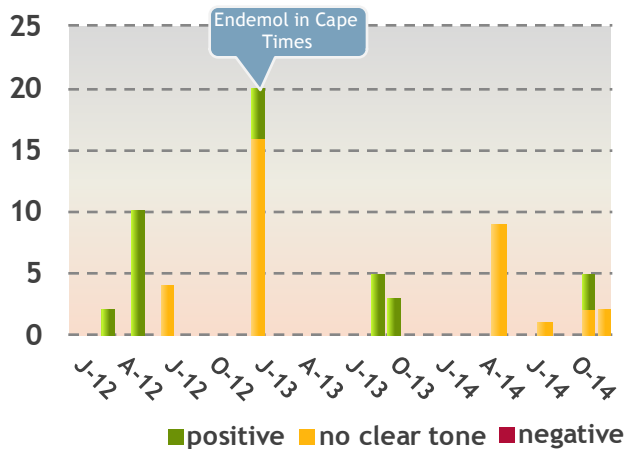
Coverage of artists and musicians was very favorable in South African media. Rembrandt ranked among the top 15 protagonists in South Africa as well, but he was covered in a rather detached way and much less enthusiastically than in other countries.



Media focus on Dutch products

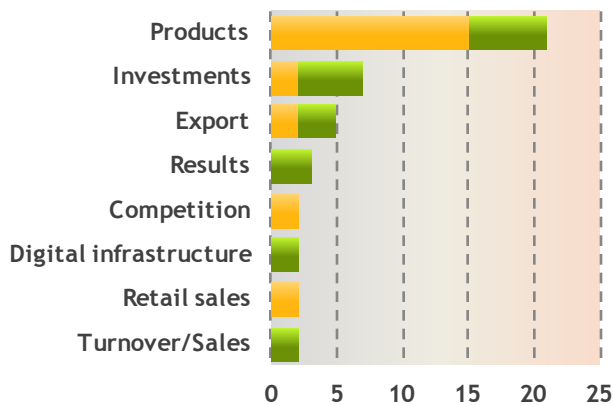
Creative industries in Z.A. media: Statement analysis

Monthly coverage on creative industries in Z.A. media, 2012-2014



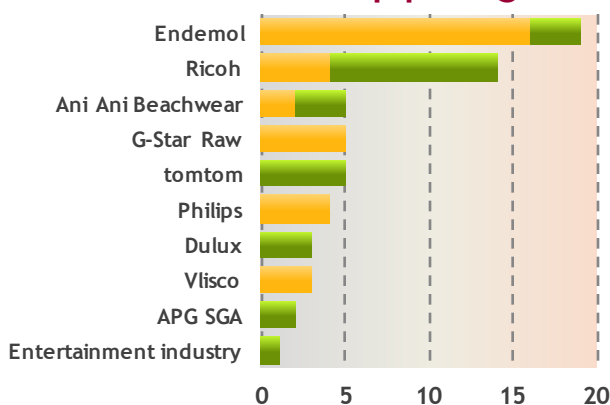
South African media reported only intermittently on companies from the creative industries segment, but the tone remained positive over the whole period. **Cape Argus** and **Cape Times** were the main channels, while **Business Day** was less interested.

Creative industries: Tone of coverage of topics, Z.A. media, 2012-2014



Reporting focused on products, but the media noted other favorable aspects as well. Nevertheless, South African media did not go into much detail to show what factors were behind the success of Dutch creative industries, like, e.g., human resources.

Creative industries: Top protagonists in Z.A. media, 2012-2014



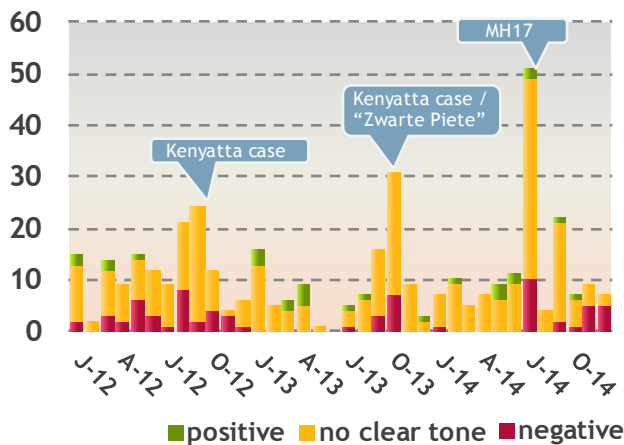
The dominance of the IT sector was less prominent than in other media markets, with media group Endemol leading in terms of volume. Dutch Innovative companies might profit from cooperation with companies that are already well connected in South Africa.



Netherlands seen as champion of free speech

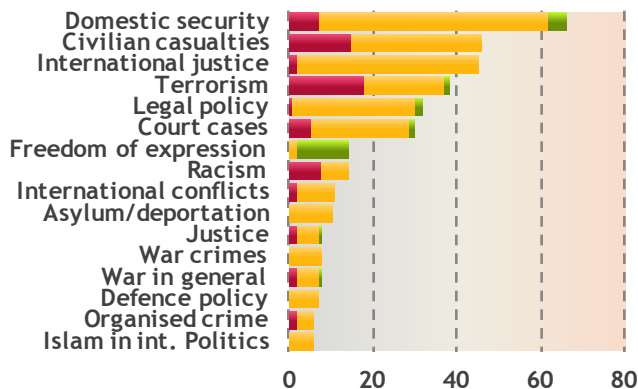
Peace & Justice/Rule of Law in Z.A. media: Statement analysis

Monthly coverage on Peace & Justice/Rule of Law in Z.A., 2012-2014



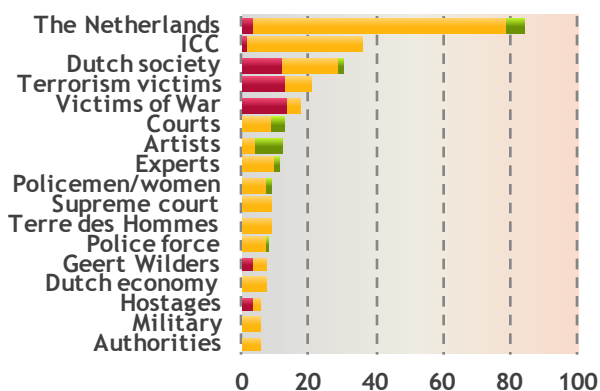
Peace and justice issues have been the Achilles' heel of the Dutch media image in South Africa. Z.A. papers have focused consistently on problems of domestic security and terrorism. They reported as well very critically on the racism debate in the Netherlands.

Peace & Justice/Rule of Law: Tone of coverage of topics, 2012-2014



With the one exception of the culture of free expression, South African media focused on the negative aspects of international politics and domestic security when reporting on the Netherlands. The Srebrenica ruling did not play a big role in South African media.

Peace & Justice/Rule of Law: Top protagonists, 2012-2014



South African media take a rather critical view of Dutch society, which is probably due to the peculiar preoccupation with race issues in the post-Apartheid country. Dutch courts and artists on the other hand play a positive role in this critical context.

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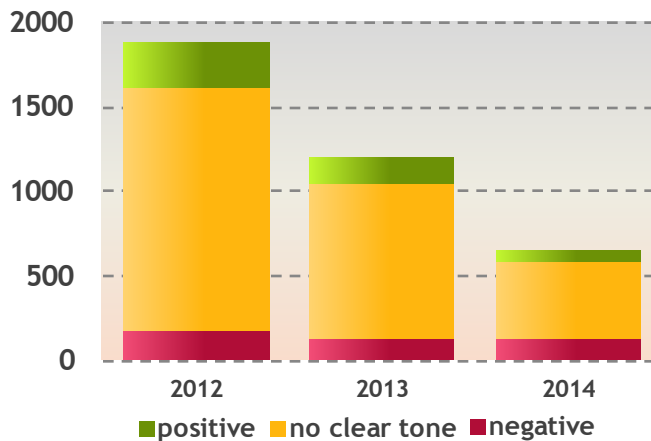
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Good news dries up in 2014

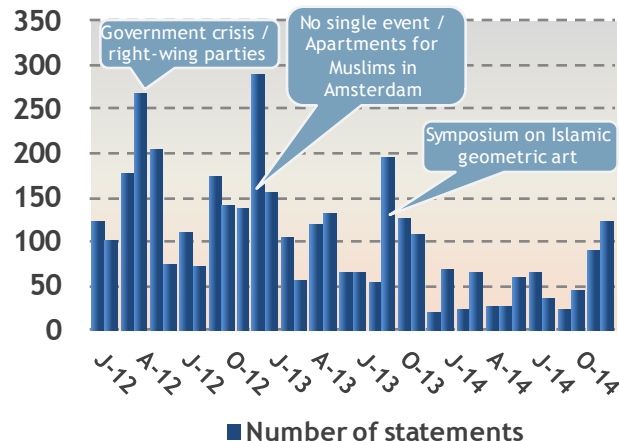
The Netherlands in Turkish media 2012-2014: Statement analysis

Volume / tone of coverage on the Netherlands, Turkish media, 2012-2014



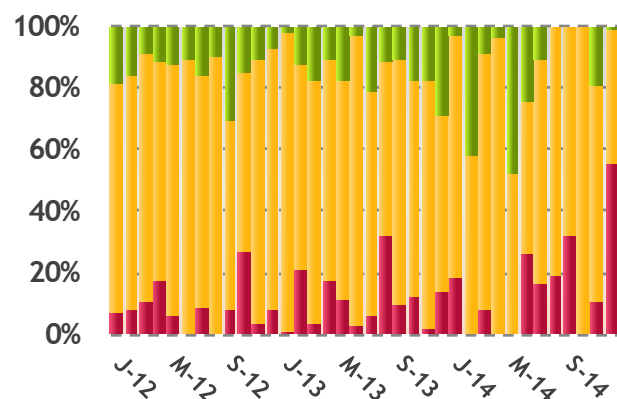
Coverage on the Netherlands and Dutch protagonists decreased from 2012 to 2014, in Turkish media - increasingly exposing the Netherlands to media risks. For Turkey, 714 news stories with 3,726 statements were analyzed. Turkish media report much less than U.S. papers.

Monthly coverage on the Netherlands, Turkish media, 2012-2014



Reporting by Turkish media has been very volatile. Volume peaked in April 2012 in connection with the breakdown of the first Rutte government and fears of right-wing victory at the ballot. Coverage in December 2012 focused on the successful budget debate.

Tone of coverage on the Netherlands in Turkish media, 2012-2014



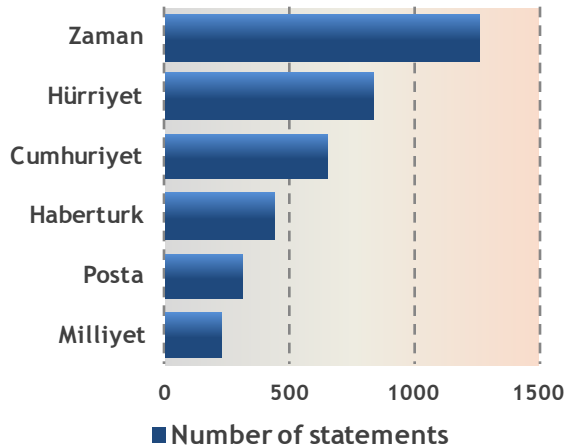
After the political debate calmed down with the election victory and the establishment of the second Rutte government, reporting by Turkish media slowed down. In 2014, the low volume led to a significant increase in the negativity of the news.



Zaman and Hürriyet find positive aspects

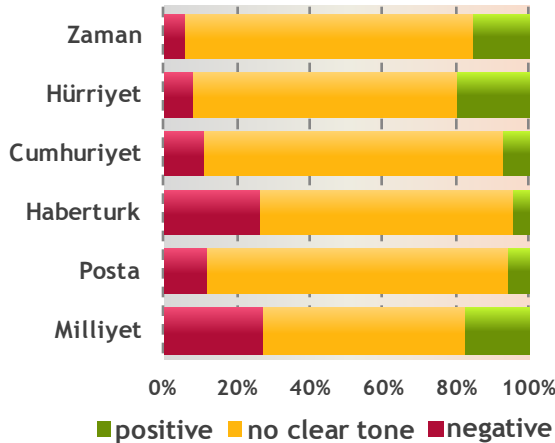
The Netherlands in Turkish media 2012-2014: Statement analysis

Volume of coverage on the Netherlands in Turkish media, 2012-2014



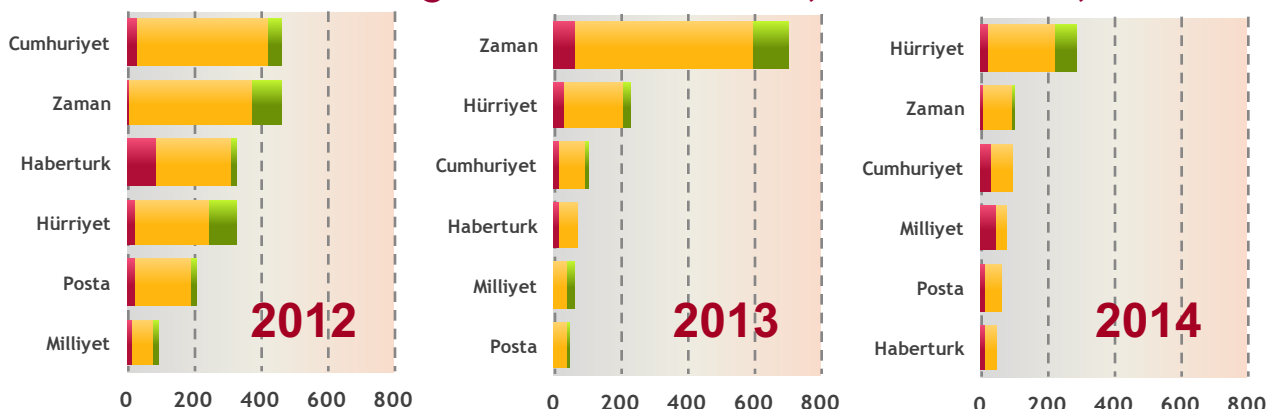
Zaman and Hürriyet report most intensively about the Netherlands - from different ends of the political spectrum. Coverage focused mainly on the Netherlands as a location: 58% of all statements refer to the Netherlands, 27% to Turkey and the rest refer to other locations.

Tone of coverage on the Netherlands in Turkish media, 2012-2014



More intensive coverage goes hand in hand with a more favorable tone. Haberturk particularly took a rather critical view of the Netherlands, focusing on crime, ranging from child abuse to hate crimes. Cumhuriyet showed some interest in the euthanasia debate.

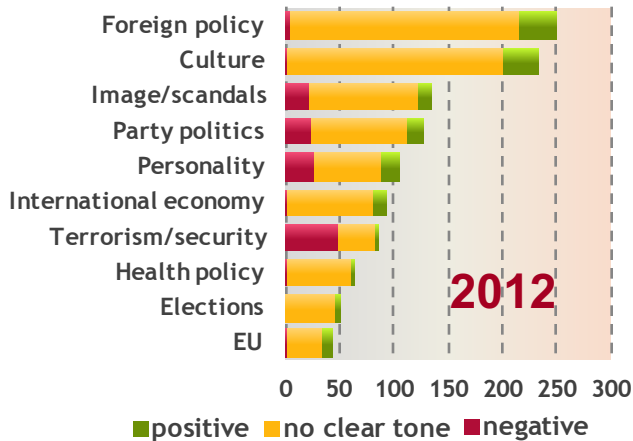
Volume / tone of coverage on the Netherlands, Turkish media, 2012-2014



Culture less prominent after 2012

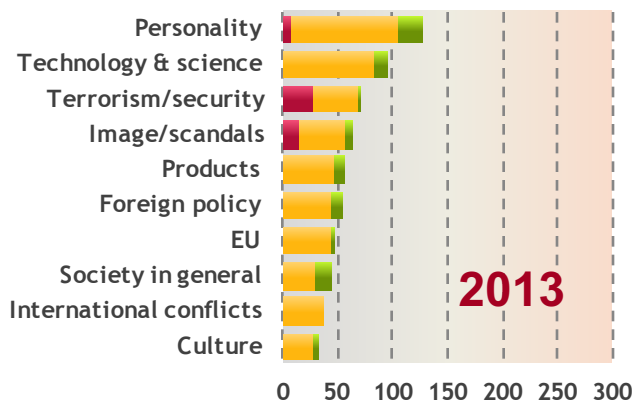
Topic structure of the Netherlands in Turkish media: Statement analysis

Topic structure on the Netherlands in Turkish media, 2012



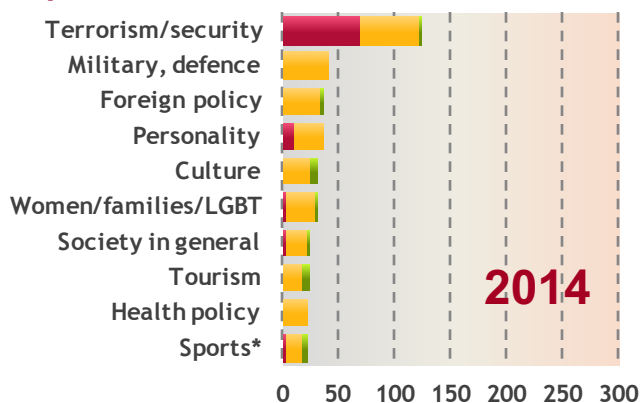
International politics and cultural issues contributed strongly to the positive perception on the Netherlands by Turkish media in 2012, while the breaking down of the first Rutte government was the most significant negative aspect of the Dutch media image.

Topic structure on the Netherlands in Turkish media, 2013



With decreasing interest in political issues, business took center stage in 2013. Whereas news about the economy was strongly negative, Dutch companies were covered much more positively. The overall coverage of the Netherlands remained notably positive.

Topic structure on the Netherlands in Turkish media, 2014

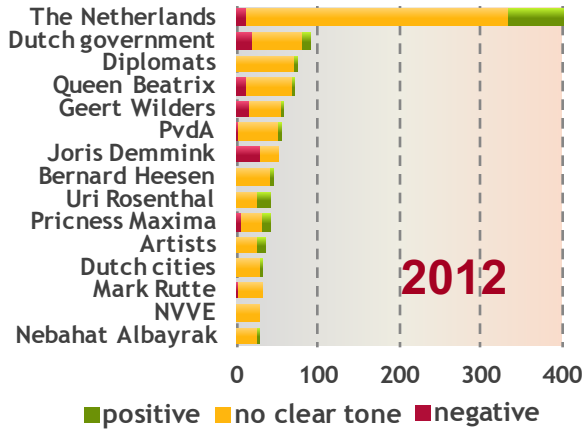


The lack of political and cultural news reflected negatively on the perception of the Netherlands and Dutch protagonists in 2014. In this context, the murder of a Dutch-Turkish businessman in Ankara topped the news.

Mafia murder makes big waves in 2014

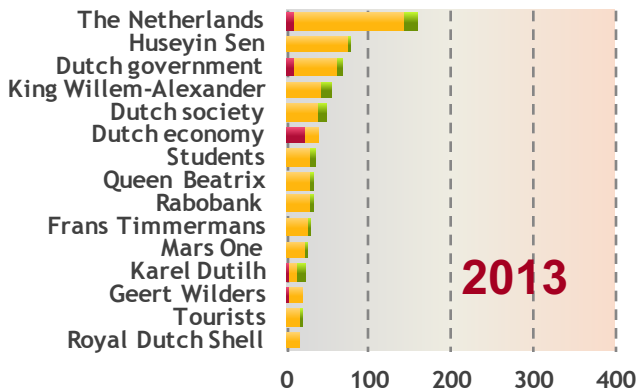
Top protagonists in the Netherlands, Turkish media: Statement analysis

Top protagonists in the Netherlands in Turkish media, 2012



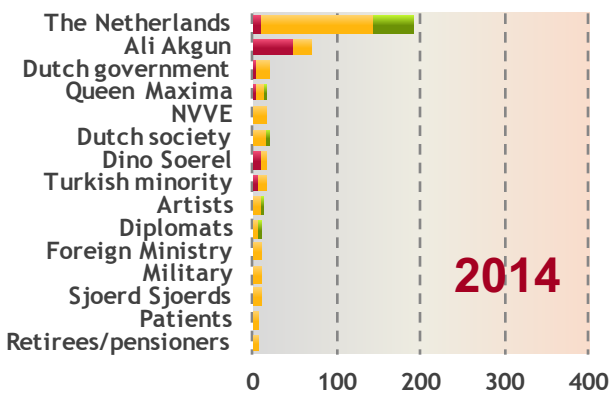
Concerns about increasing xenophobia in the Netherlands were reflected in the prominent role of Geert Wilders, who was the second most visible individual, close to Queen Beatrix. The case against the ministerial official, Joris Demmink, got strong awareness in Turkey.

Top protagonists in the Netherlands in Turkish media, 2013



The handover from Queen Beatrix to King Willem-Alexander was covered prominently in Turkish media, while the role of Geert Wilders was covered less prominently. The art historian, Huseyin Sen, who organized an exhibition in the Netherlands, was covered in Zaman.

Top protagonists in the Netherlands in Turkish media, 2014



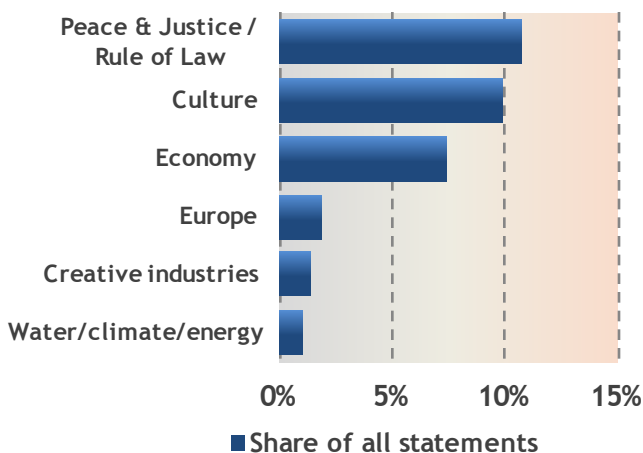
Coverage of Dutch protagonists became even less focused on in 2014. With a notable accent on domestic events, many references to the Netherlands took a rather negative turn. Dutch artists did not feature prominently in Turkish papers for the whole period.



Peace and law issues attract attention

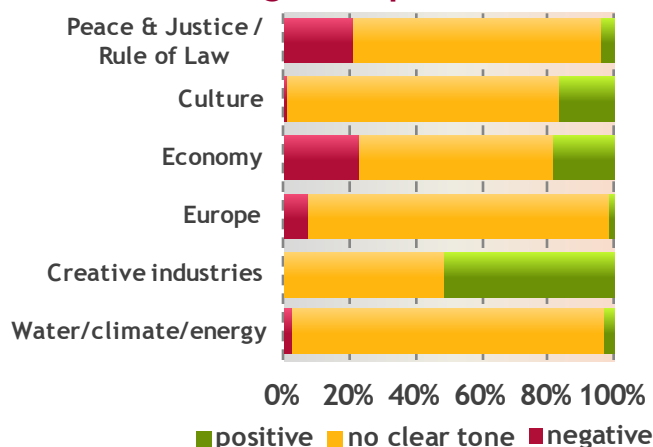
Special issues in Turkish media 2012-2014: Salience / tone of coverage

Salience of special issues in Turkish media, 2012-2014



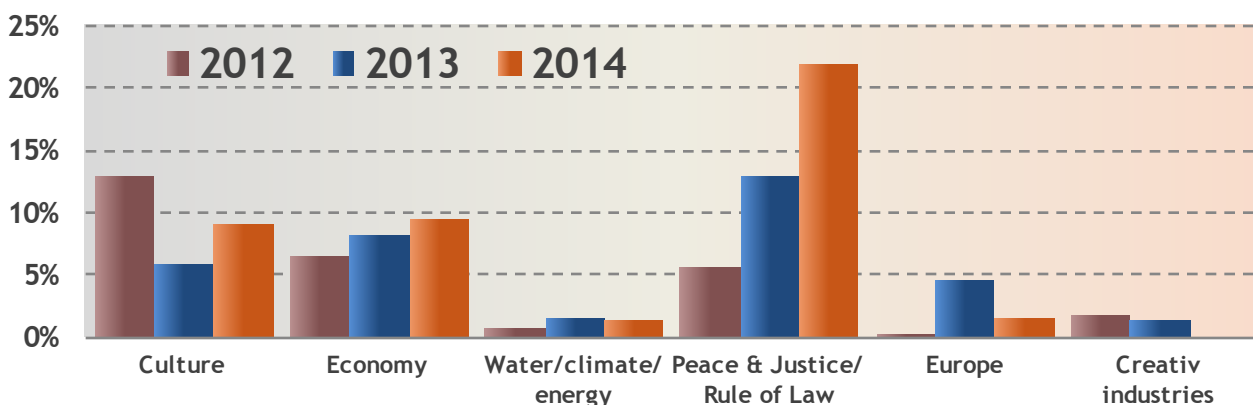
Contrary to Germany or the U.S., culture did not dominate the news selection of Turkish media. European or environmental issues and the creative industries did not play a significant role in Turkish newspapers, while economic and peace issues were prominent.

Tone of coverage on special issues in Turkish media, 2012-2014



In line with general trends in international news, cultural issues and creative industries were also covered positively in Turkey. Reporting on economic issues improved, while coverage of peace issues overshadowed the image of the Netherlands even more.

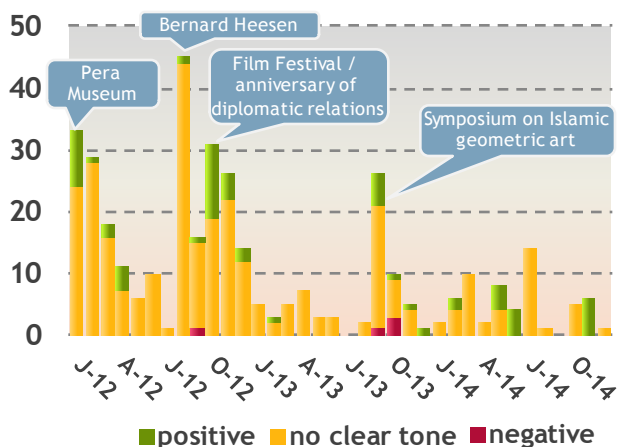
Volume / tone of coverage on the Netherlands, Turkish media, 2012-2014



Haberturk abstains from judgement

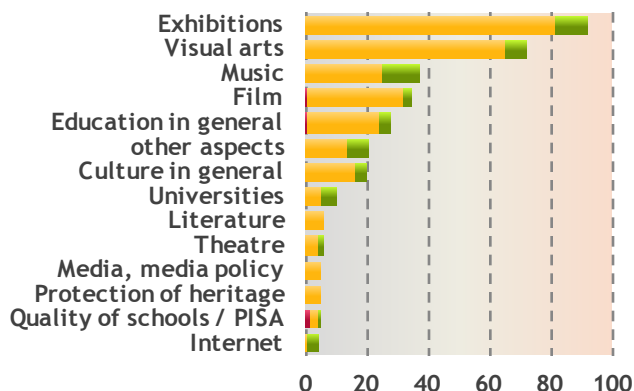
Cultural issues in Turkish media: Statement analysis

Monthly coverage on cultural issues in Turkish media, 2012-2014



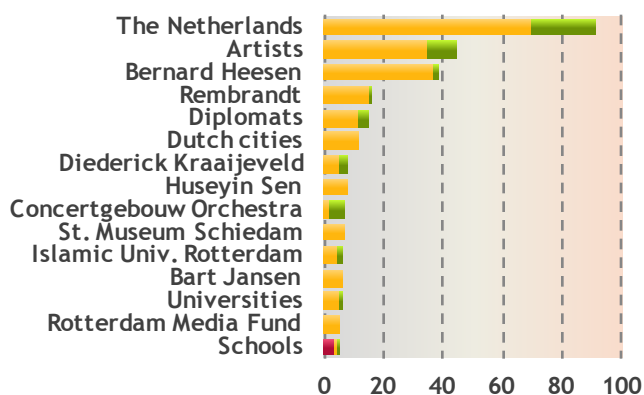
Cultural issues lost much steam over time - quite in line with the significant decrease in cultural activities of Dutch institutions in Turkey, which declined from 589 events in 2012 to only 99 in 2014. Overall tone on Dutch protagonists remained favorable.

Cultural issues: Tone of coverage on topics in Turkish media, 2012-2014



Coverage of cultural issues was distinctly favorable, especially with regards to music; most prominently, the Concertgebouw Orchestra. On the other hand, the Anne Frank Stichting and the Anne Frank House did not generate awareness in Turkey.

Cultural issues: Top protagonists in Turkish media, 2012-2014

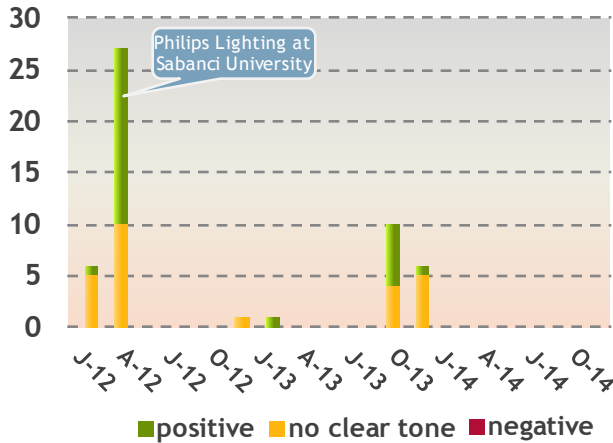


From the well-known Dutch old masters, only Rembrandt was mentioned prominently in Turkish media - linked to the exhibition “The Golden Age of Dutch Art: Paintings from the Rijksmuseum and the Kaplan Collection”, in Istanbul.

Limited visibility on creative industries

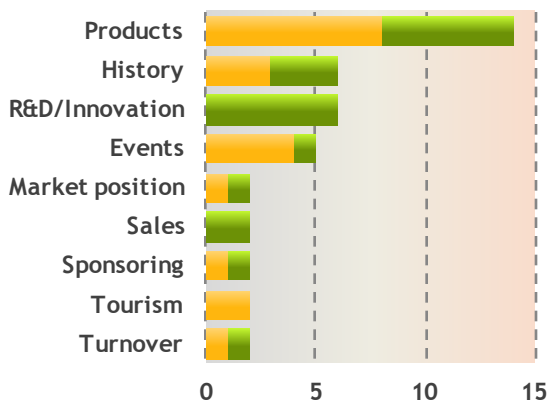
Creative industries in Turkish media: Statement analysis

Monthly coverage on creative industries in Turkish media, 2012-2014



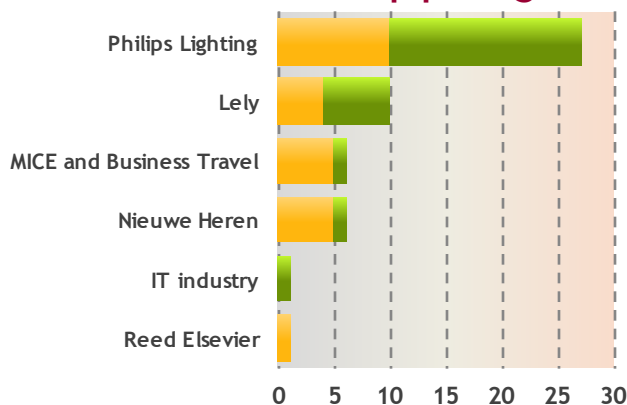
Coverage on Dutch creative industries was very limited in Turkish media. Only two phases of reporting in early 2012 and late 2013 stand out. While only **Hürriyet** and **Zaman** reported about the creative sector, both painted a favorable image of those Dutch companies

Creative industries: Tone of coverage on topics, Turkish media, 2012-2014



News on products dominated reporting about companies from the creative segment, but Turkish media also highlighted the importance of R&D and innovation for business success. Classic corporate topics such as finances or strategy played a minor role.

Creative industries: Top protagonists in Turkish media, 2012-2014

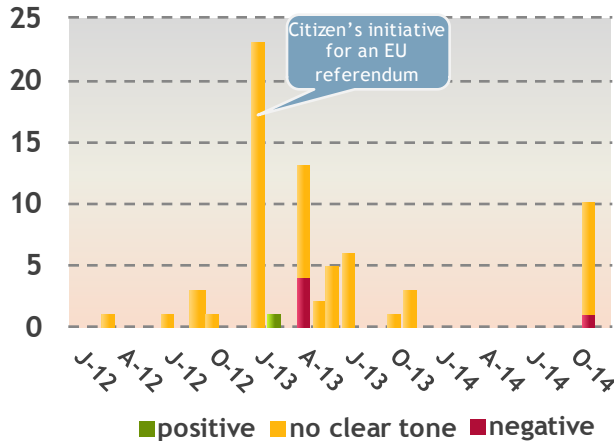


Turkish media highlighted Philips' lighting business in 2012, while other companies, not only from the software industry, were covered only intermittently. However, all the companies mentioned attracted favorable reporting, regardless of their industry.

European perspective is lost

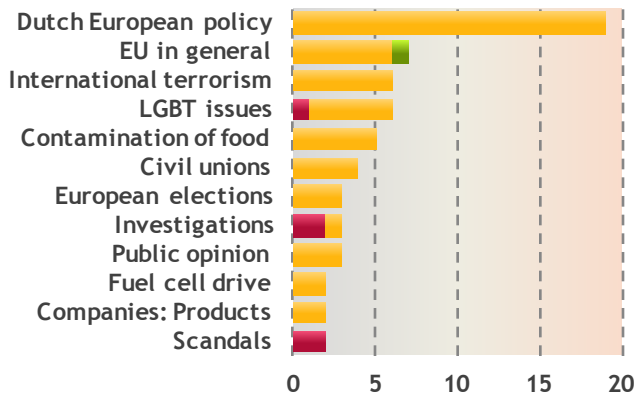
Europe in Turkish media: Statement analysis

Monthly coverage on European issues in Turkish media, 2012-2014



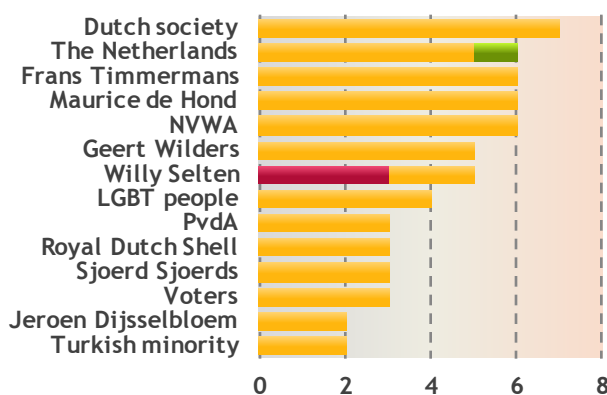
As the perspective of a medium-term accession of Turkey to the European Union has become increasingly unlikely, Turkish media have reported less about the Dutch European policy. After a spate of reporting in early 2013, coverage on European issues dried up in 2014.

European issues: Tone of coverage on topics, 2012-2014



The overall reporting about the Netherlands, in the context of European issues, has been rather neutral. There were only a few critical references to some Europe-wide scandals and the thorny issue of LGBT rights, which collided with the policies of then Prime Minister Erdogan.

European issues: Top protagonists, 2012-2014



Only a few Dutch politicians have been mentioned in Turkish media with reference to the EU, but the “meat tycoon” Willy Selten, who was arrested in the wake of the 2013 horse meat scandal, was the only Dutchman covered critically in an EU context.



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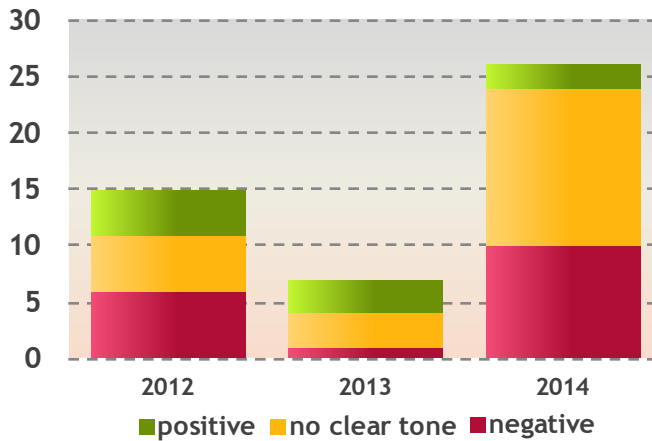
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MH17 catastrophe raised awareness in the U.S.

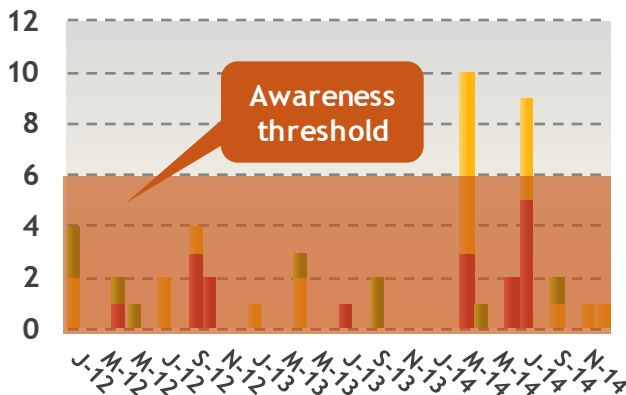
The Netherlands in U.S. TV news 2012-2014: Report analysis

Volume and tone of coverage on the Netherlands, U.S. TV, 2012-2014



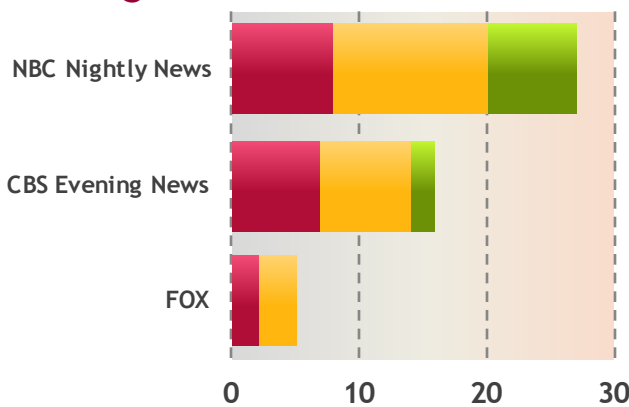
The number of references to the Netherlands increased slightly in 2014, but overall coverage in the U.S. main evening TV news is very low. Bad news clearly remained the main news driver for TV journalists, as the state funeral for the victims of MH17 was even covered by U.S. TV.

Monthly coverage on the Netherlands, U.S. TV, 2012-2014



A minimum presence of at least 2 reports per month on a TV show is necessary to reach public awareness. Apart from the MH17 catastrophe, the scandal around the U.S. Secret Service - with allegations of misbehavior in Amsterdam, generated awareness in the U.S.

Coverage on the Netherlands in U.S. TV news, 2012-2014



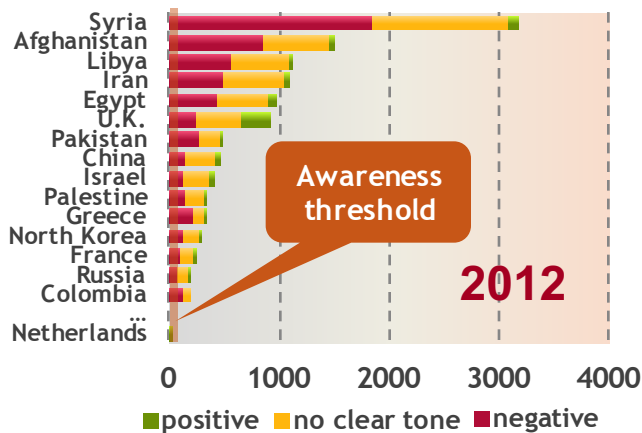
The three programs analyzed not only differ in intensity of reporting but also with regard to tonality. CBS and FOX mostly pick up bad news from the Netherlands, while NBC paints an almost balanced picture. Overall, TV coverage is strongly polarized.



Netherlands far below the awareness threshold

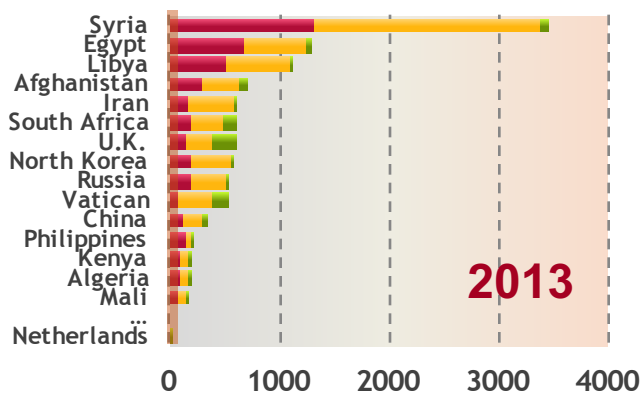
Volume and tone of coverage on foreign countries on U.S. TV

Volume and tone of coverage on foreign countries in U.S. TV news, 2012



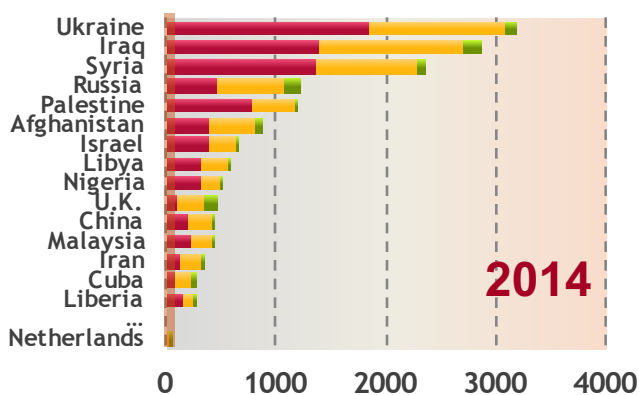
U.S. TV news is not only more inward-looking than programs from other countries, but also focuses on global hot spots where U.S. interests are involved. European countries with an international position comparable to the Netherlands do not get sufficient awareness.

Volume and tone of coverage on foreign countries in U.S. TV news, 2013

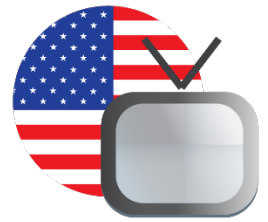


When analyzing total coverage in general interest media, Media Tenor has established an awareness threshold of 2 reports per TV program, per month. When a topic or protagonist transcends this mark, the population starts to become aware of it.

Volume and tone of coverage on foreign countries in U.S. TV news, 2014



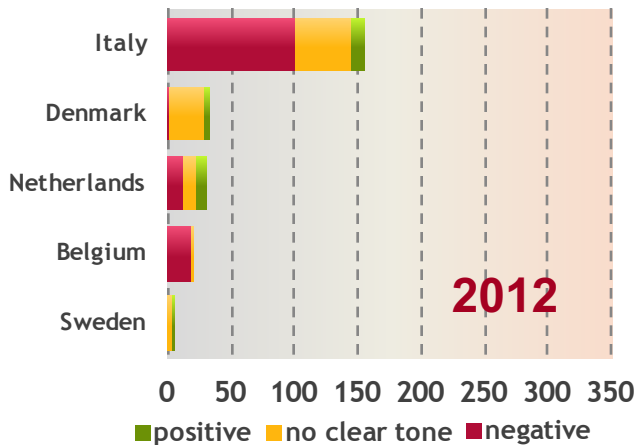
Apart from the U.K., European countries do not feature prominently in U.S. news. Therefore, information about the Netherlands does not reach the wider public to a significant extent, through the most important news vehicle.



Netherlands fares well in a negative media climate

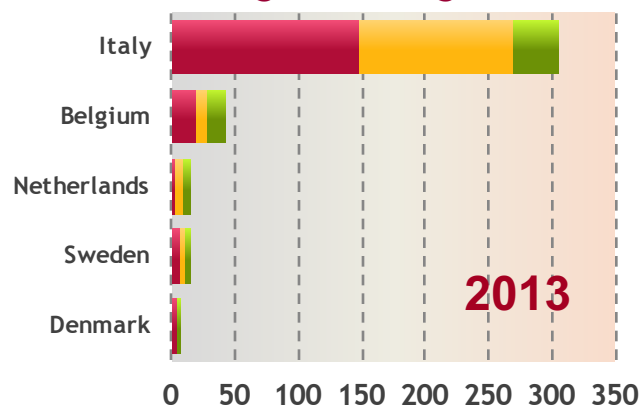
Tone of coverage on the Netherlands on U.S. TV in comparison

Tone of coverage of foreign countries in U.S. TV news, 2012



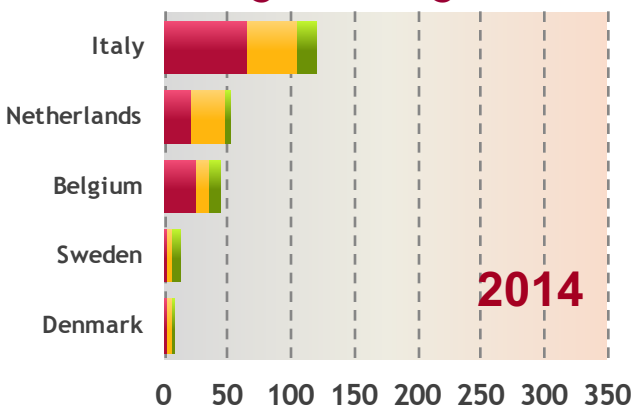
International TV news is generally more negative than domestic news. For the Netherlands, the low level of awareness compounds this trend. Nevertheless, tonality is rather benign, even in comparison to other Scandinavian or Western European countries.

Tone of coverage of foreign countries in U.S. TV news, 2013



In 2013, U.S. news focused on the inauguration of King Willem-Alexander. This led - in a relative perspective - to an even more positive media image than that of the Vatican, where Pope Francis was received enthusiastically. However, awareness decreased compared to 2012.

Tone of coverage of foreign countries in U.S. TV news, 2014



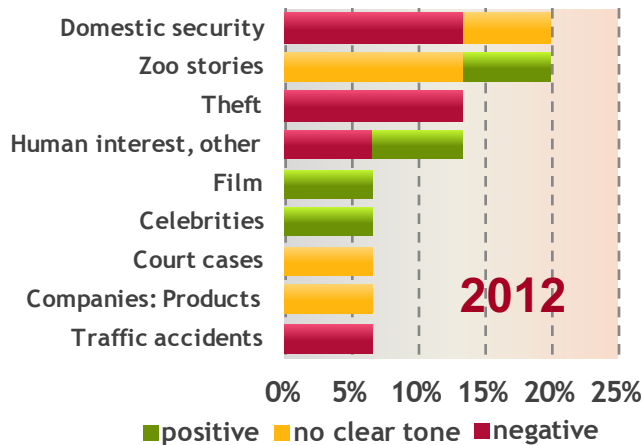
Coverage of the Netherlands was influenced by the Ukraine conflict and MH17, thus becoming more negative in 2014. However, the news was mostly not explicitly critical about Dutch protagonists, but showed them as victims or focused on non-Dutch actors.



Arts and human interest visible on U.S. screens

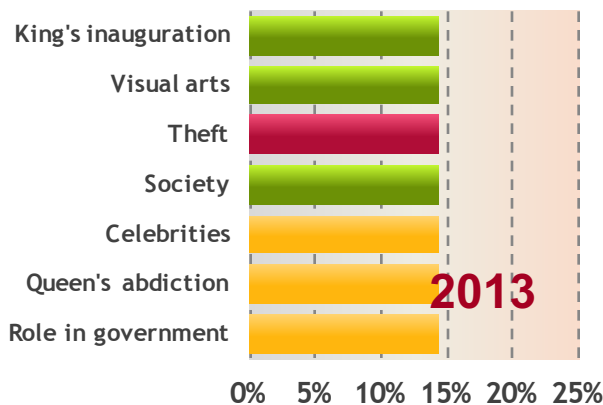
Topics on the Netherlands on U.S. TV: Report analysis

Topics on the Netherlands in U.S. TV news, 2012



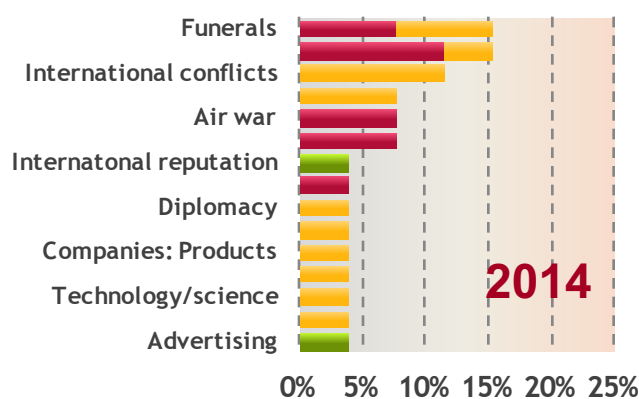
While crime and human interest dominated TV news in 2012, there was some notable positive references to cultural issues on U.S. TV. In general, arts topics are picked up by TV news, mainly with regard to high-key events. Coverage in 2012 was unspectacular.

Topics on the Netherlands in U.S. TV news, 2013



There were few negative issues taken up by U.S. TV news shows in 2013. Apart from the handover from Queen Beatrix to King Willem-Alexander, the discovery of another “genuine” van Gogh in Amsterdam was noted. Bad news related to the art theft in Rotterdam.

Topics on the Netherlands in U.S. TV news, 2014



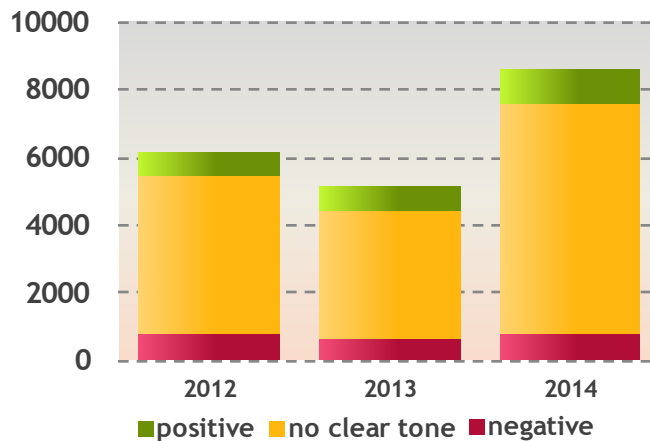
Coverage of the Netherlands became more in-depth in 2014 as more protagonists were mentioned in the news. Reporting about the catastrophe of MH17, the Ukraine conflict, and the scandal around the U.S. Secret Service contributed to an overall negative image.



Print media reports in a balanced way

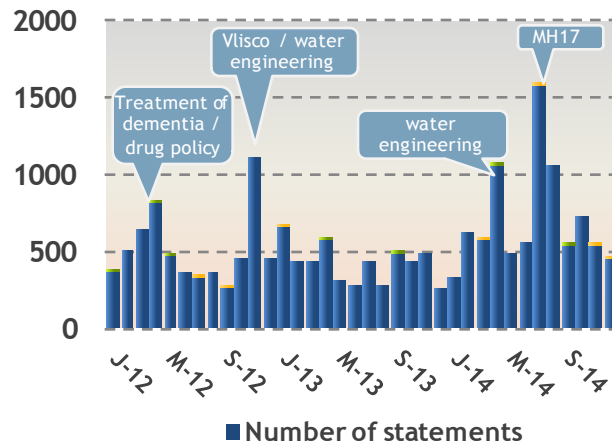
The Netherlands in U.S. print media 2012-2014: Statement analysis

Volume / tone of coverage on the Netherlands, U.S. media, 2012-2014



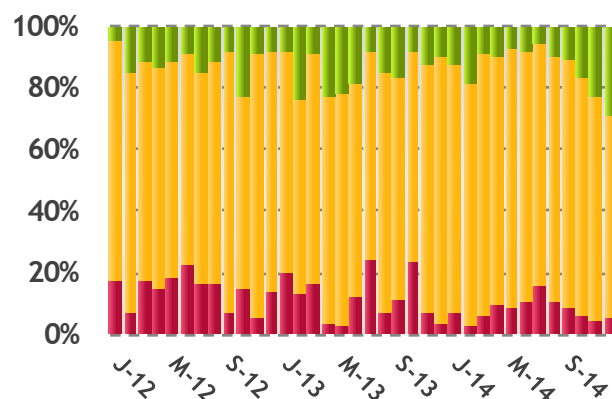
For the three years, Media Tenor has analyzed 2,191 news stories in 10 U.S. opinion-leading print media. These comprise 20,088 statements about Dutch protagonists or the Netherlands. Quite in line with TV coverage, the overall volume of reporting increased notably in 2014.

Monthly coverage on the Netherlands, U.S. media, 2012-2014



Coverage in print outlets peaked in July 2014, the month flight MH17 was shot down. Previous peaks are related to drug policy, the austerity budget and the Otterloo collection in Boston in April 2012. In April 2014, water was a prominent issue addressed by the NYT.

Tone of coverage on the Netherlands in U.S. media, 2012-2014



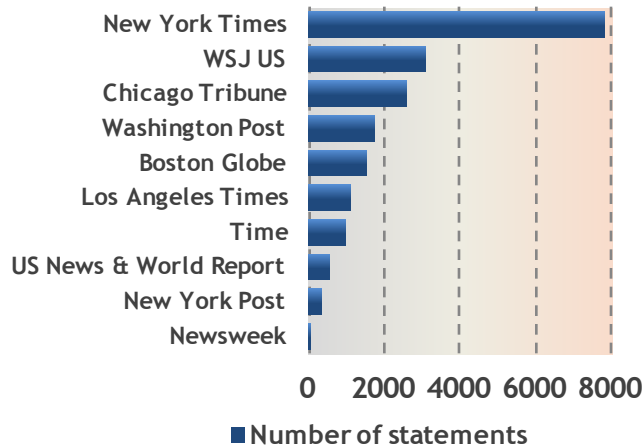
Over the long term, coverage was widely balanced — with 11% negative statements and 12% positive statements, the rest being either neutral or ambivalent. Since July 2014, the tone has improved consistently, mainly based on cultural issues.



New York Times by far the most important medium

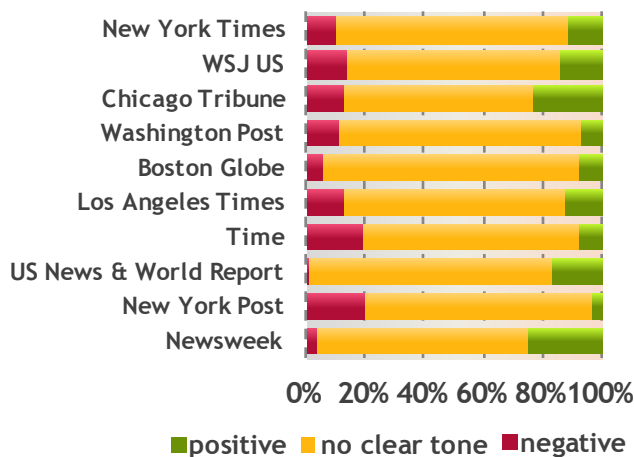
The Netherlands in U.S. print media 2012-2014: Statement analysis

Volume of coverage on the Netherlands in U.S. media, 2012-2014



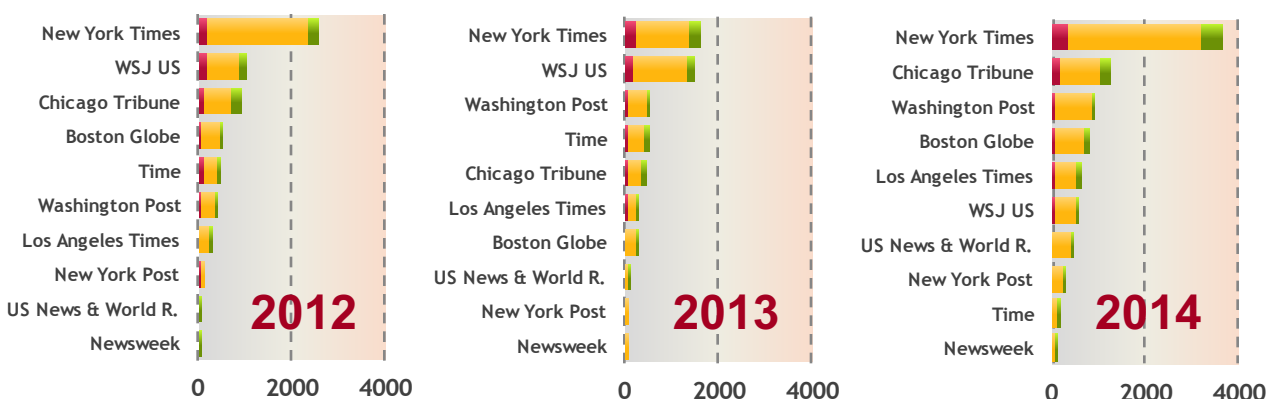
In terms of volume, The New York Times (NYT) vastly surpasses the other daily newspapers. The WSJ, combined with the other local papers, reaches only about 14-40% of the volume of the NYT. The Netherlands achieves significant visibility, but not in the big cities in the U.S.

Tone of coverage on the Netherlands in U.S. media, 2012-2014



The WSJ in particular, reported more intensively about economic problems in 2012 and 2013, but overall tone was balanced. Tonality was more favorable in Chicago Tribune, US News & World Report and Newsweek, but for the latter two volume was quite low.

Volume / tone of coverage on the Netherlands in U.S. media, 2012-2014

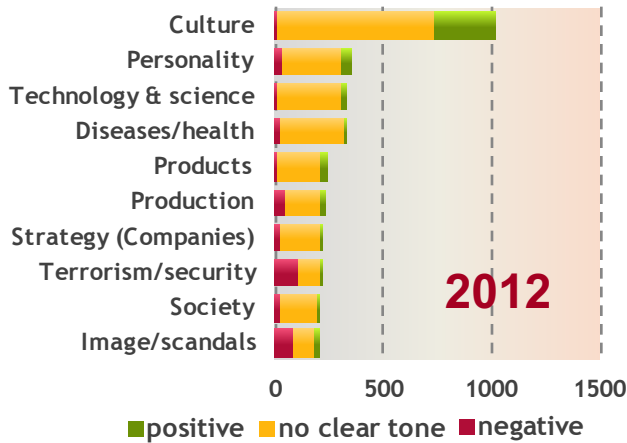




Cultural issues became more important

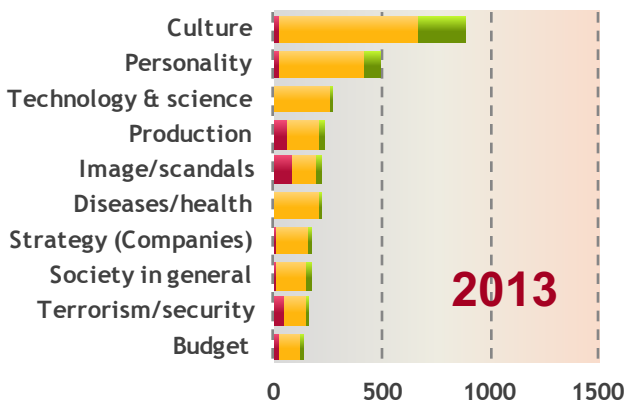
Topic structure of the Netherlands in U.S. media: Statement analysis

Topic structure of the Netherlands in U.S. media, 2012



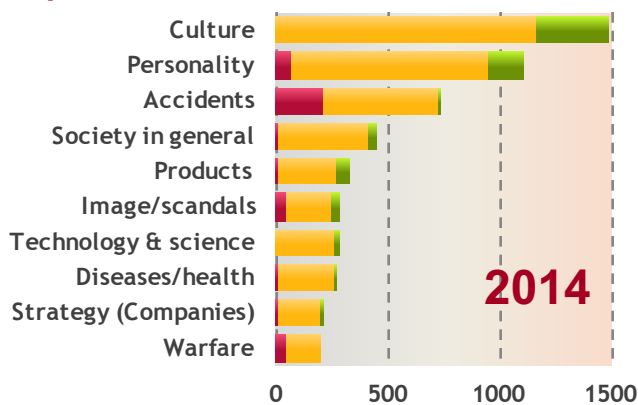
Culture and business shape the perception of the Netherlands in the leading print media in the U.S., while economic policy has become less prominent after the elections in 2012. As cultural issues are generally covered positively by the media, this is a clear benefit for the Netherlands.

Topic structure of the Netherlands in U.S. media, 2013



Unlike in TV news, the royal succession did not dominate print news. Overall, coverage was less intensive than it was in 2012, with the election leading to a stable government. On the other hand, business coverage remained critical and was largely shaped by Shell.

Topic structure of the Netherlands in U.S. media, 2014



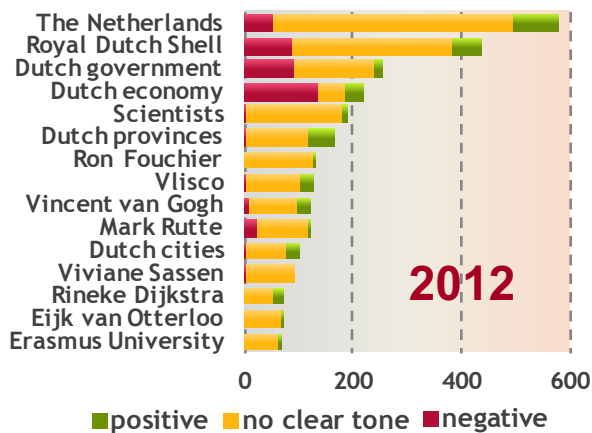
Cultural news almost doubled compared to the previous year, while the overall tonality improved across a wide range of issues. The fate of the MH17 victims and the international fallout were the most visible negative issues - apart from ongoing negative news on crime.



Economy and business pose risks

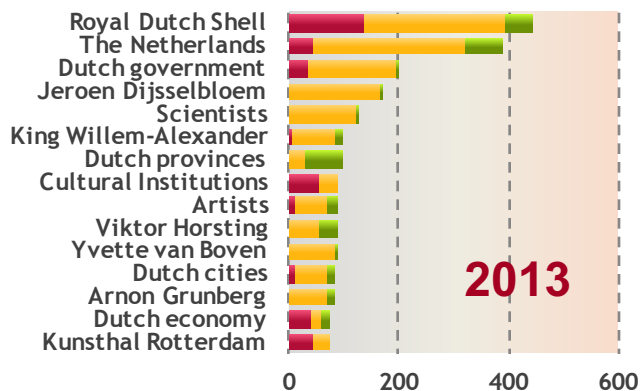
Top protagonists in the Netherlands in U.S. media: Statement analysis

Top protagonists in the Netherlands in U.S. media, 2012



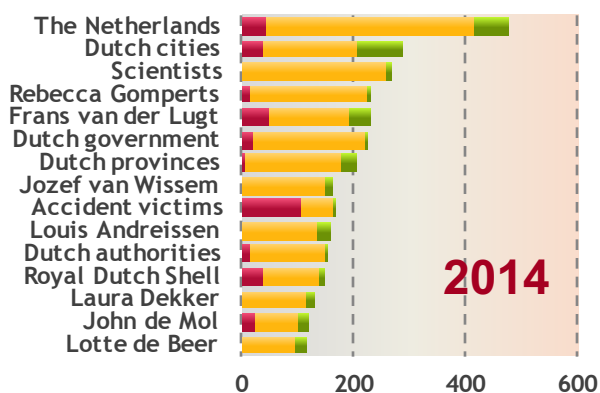
47% of all statements about Dutch protagonists are related to events in the Netherlands, while 12% refer to the U.S.; the rest are related to other countries. The Netherlands and its government featured prominently in 2012/2013, but the government became less prominent in 2014.

Top protagonists in the Netherlands in U.S. media, 2013



Shell's activities in the U.S. have received strong criticism in U.S. media and have evoked other controversial aspects, such as the charges of pollution and corruption in Nigeria. Rotterdam's Kunsthall made headlines due to a spectacular theft in October 2013.

Top protagonists in the Netherlands in U.S. media, 2014



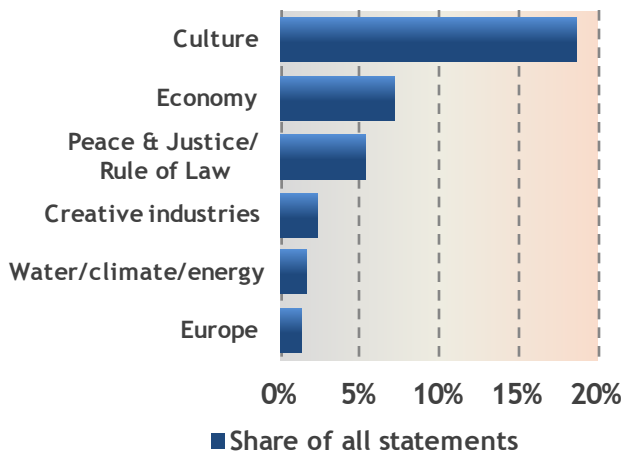
Dutch artists in the U.S. were prominent in 2014 due to some in-depth features, such as those about Jozef van Wissem or Louis Andreissen. Dutch politicians, on the other hand, dropped from the top ranks in U.S. media - probably due to a lack of strife.



Cultural issues shape perception in the U.S.

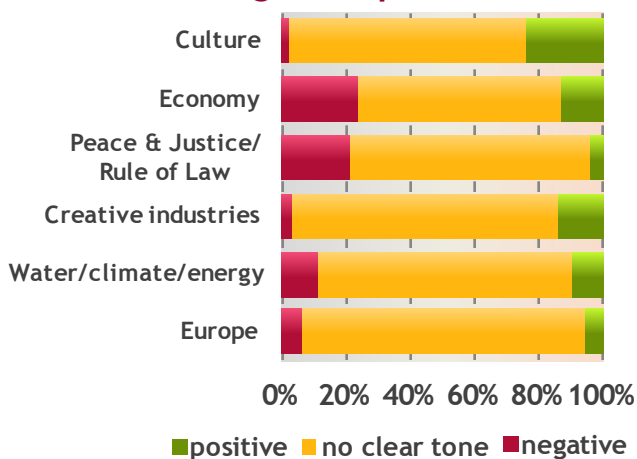
Special issues in U.S. media 2012-2014: Salience and tone of coverage

Salience of special issues in U.S. media, 2012-2014



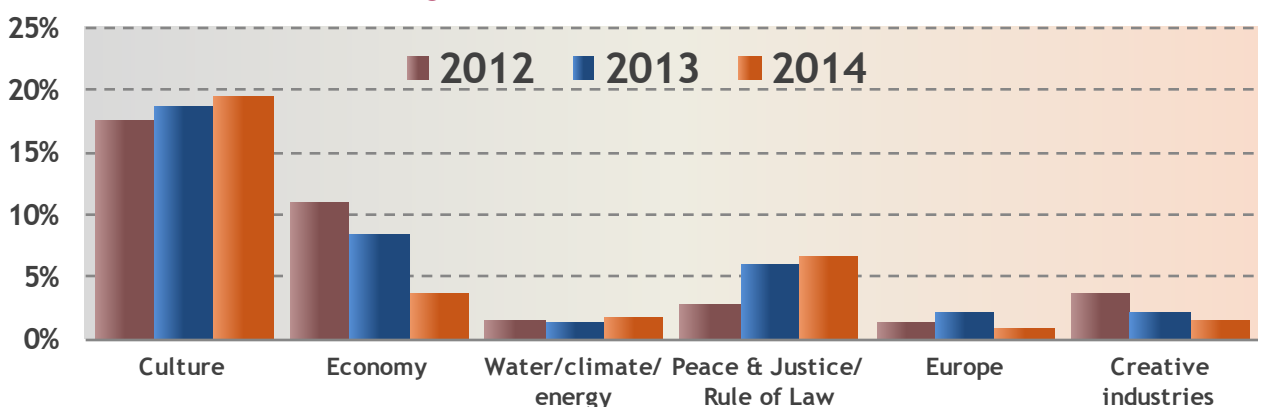
Culture, economy and peace issues dominated the perception of the Netherlands for the whole period of analysis. Almost 1 in 5 statements dealt with concrete references to arts or education. Business played a minor role, as is evident from the few references to creative industries.

Tone of coverage on special issues in U.S. media, 2012-2014



Coverage on culture is widely positive and accounts for more than 1/3 of all positive statements about the Netherlands or Dutch protagonists. Coverage of peace issues was strongly negative in the wake of the Middle East and Ukraine crises.

Volume / tone of coverage on the Netherlands in U.S. media, 2012-2014

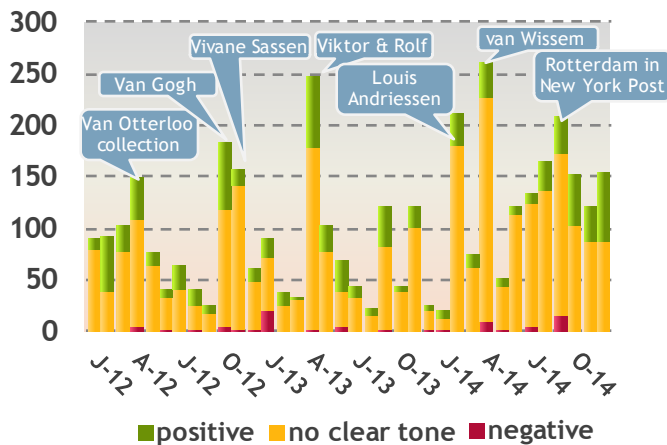




Dutch image profits from increased focus on culture

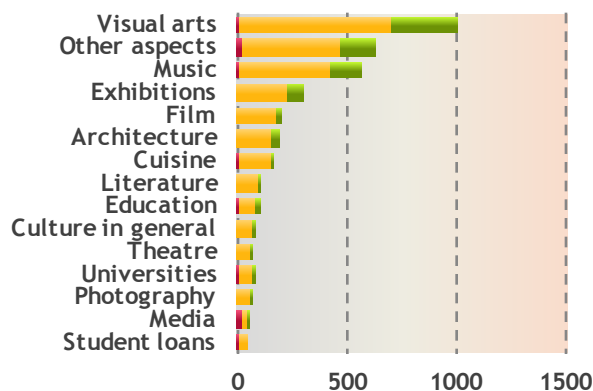
Cultural issues in U.S. media: Statement analysis

Monthly coverage on cultural issues in U.S. media, 2012-2014



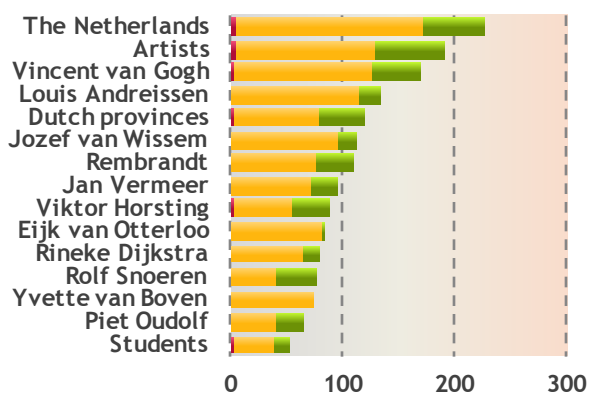
Reporting about cultural issues became more steady in the second half of 2014. Van Gogh (October 2012), Viktor & Rolf (April 2013), Andriessen (February 2014) and van Wissem (April 2014) accounted - to some extent - for the peaks in the period up to June 2014.

Cultural issues: Tone of coverage on topics in U.S. media, 2012-2014



While dominant aspects were covered quite positively throughout, there were only a few critical comments, confined to issues of education and the media. However, U.S. media did not go into detail with regards to quality issues at universities of the Utopia TV program.

Cultural issues: Top protagonists in U.S. media, 2012-2014



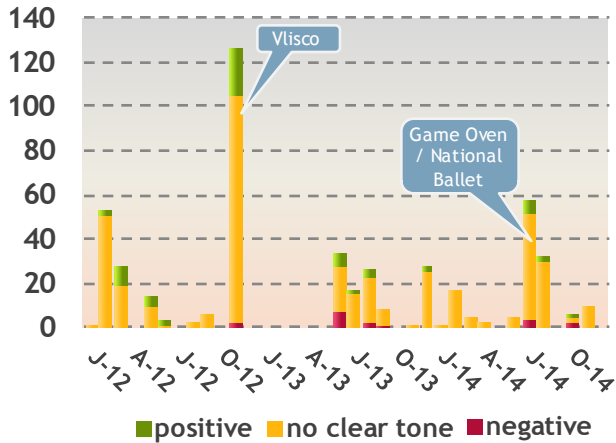
The Netherlands in general, as well as its individual provinces, has largely been covered with regard to cultural issues. Amsterdam and Rotterdam stand out among the Dutch cities, while coverage on events in the U.S. focused on New York, Boston and Chicago.



Creative industries with limited resonance

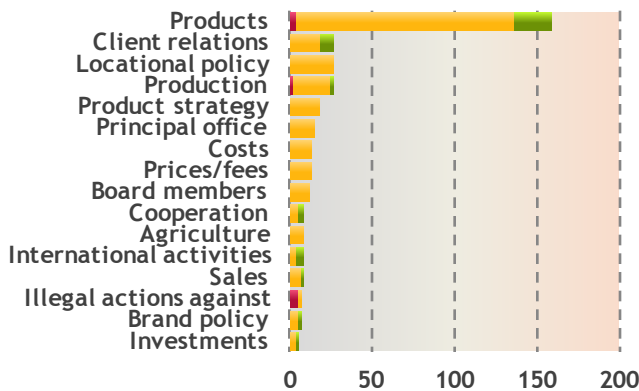
Creative industries in U.S. media: Statement analysis

Monthly coverage on creative industries in U.S. media, 2012-2014



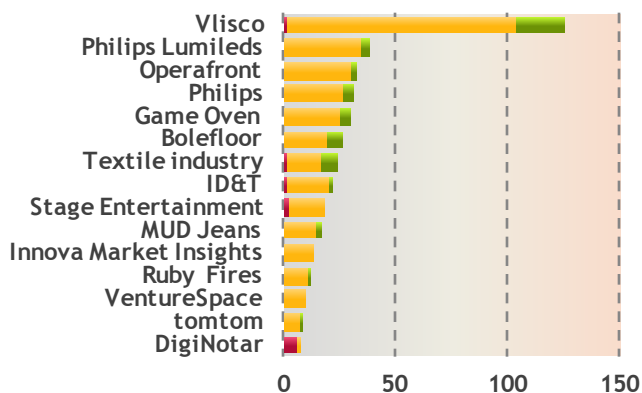
Companies from the segment of creative industries have been covered only intermittently. However, contrary to the overall skeptical tone, they were covered in a rather positive manner. A NYT report about Vlisco, from November 2012, stands out as an example of in-depth reporting.

Creative industries: Tone of coverage on topics in U.S. media, 2012-2014



Coverage on products and client focus was clearly positive. Critical aspects such as cost and production conditions played a minor role. Dutch business was also affected by cyber attacks and spying, which have become prominent issues due to the revelations by Edward Snowden.

Creative industries: Top protagonists in U.S. media, 2012-2014



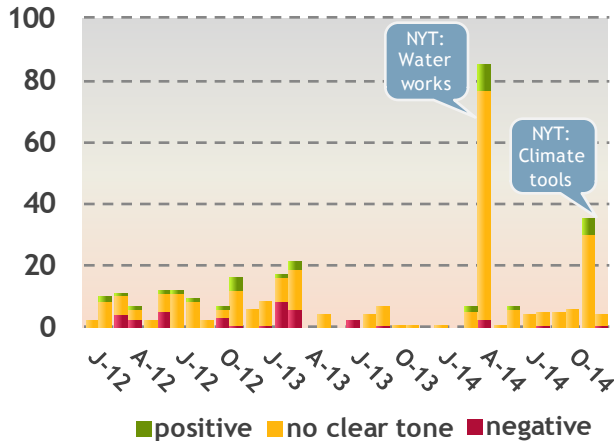
Among a wide range of companies, mostly from the IT sector, Philips is the most prominent household name, while TomTom did not receive much coverage in U.S. outlets. A large piece on Vlisco, in the NYT, was a clear exception among mainly short mentions.



Image on environmental issues improved in 2014

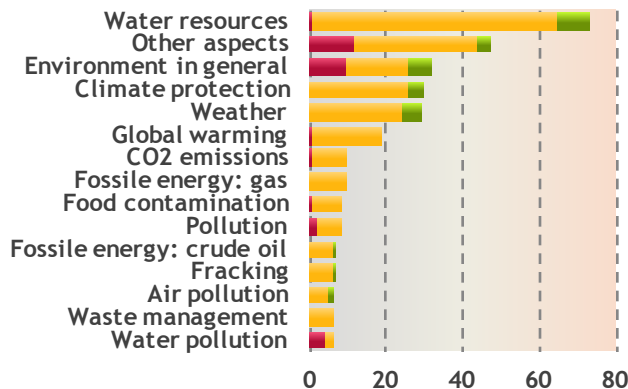
Water/climate/energy in U.S. media: Statement analysis

Monthly coverage on water/climate/energy in U.S. media, 2012-2014



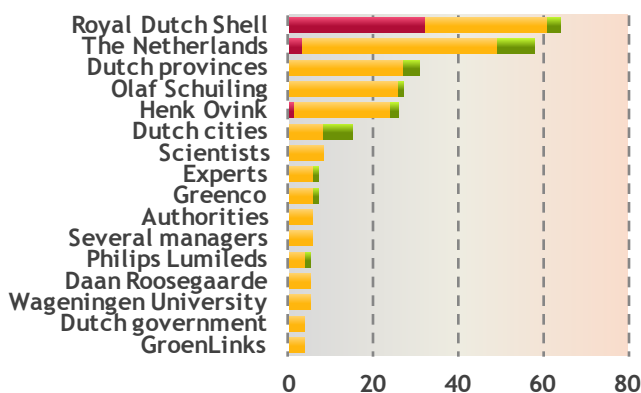
Coverage on water and environment was marked by a clear sea change between 2012 and 2014. While the early period was characterized by the ongoing criticism of Shell, reports about water works in August, and climate tools in November 2014 were positive highlights.

Water/climate/energy: Tone of coverage on topics, 2012-2014



The Netherlands was covered quite positively with regards to the management of water resources, climate protection and precautions against severe storms and floods. However, there are several risks in this field. Negative statements mostly referred to Shell.

Water/climate/energy: Top protagonists, 2012-2014



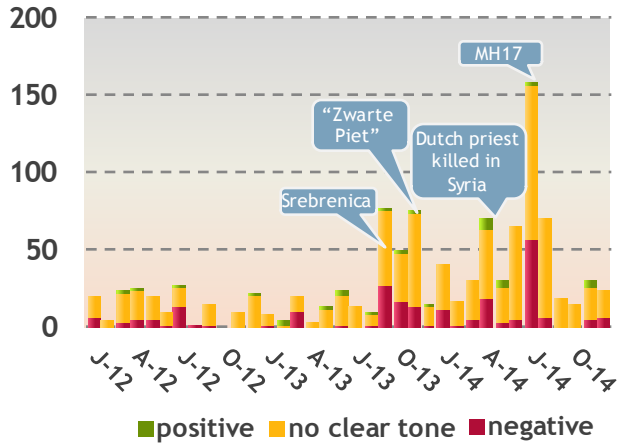
Royal Dutch Shell stands out as the most visible and most negatively covered entity in reports about environmental issues. This structure, to some extent, undermines the fairly favorable coverage of the Netherlands and other Dutch protagonists.



Netherlands under the shadow of Srebrenica

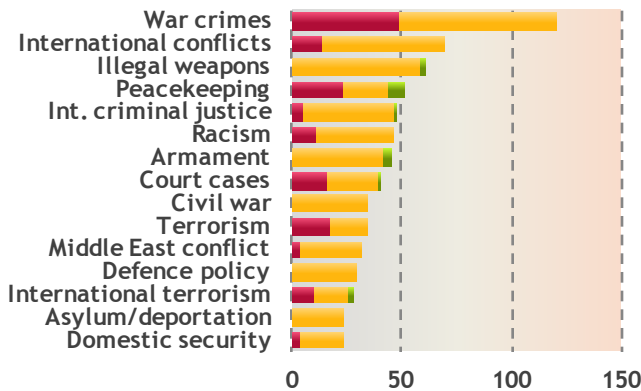
Peace & Justice/Rule of Law in U.S. media: Statement analysis

Monthly coverage of Peace & Justice/Rule of Law, 2012-2014



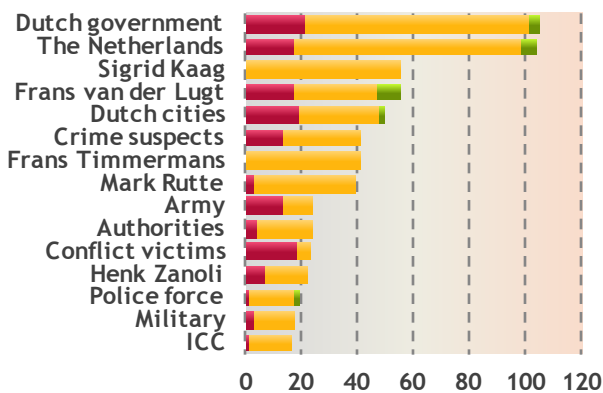
Peace and law issues became more prominent in 2013 in the wake of the increasing world-wide violence. The rise in coverage in September 2013 related to Dutch peacekeepers being indicted for not preventing the massacre of Srebrenica. MH17 marked the overall peak in 2014.

Peace & Justice/Rule of Law: Tone of coverage of topics, 2012-2014



Coverage on the Netherlands emphasized the downside of events, although not all reports were explicitly critical of Dutch protagonists. The shooting down of MH17, as well as the court case against the Dutch government in connection with Srebrenica, were mostly negative.

Peace & Justice/Rule of Law: Top protagonists, 2012-2014



While the Netherlands at large had to cope with negative coverage, leading Dutch politicians did not garner significant negativity. Active communication on the issues thus helps to put events in a wider context and contribute to a more balanced picture.

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Analysis of individual media markets

Egypt 11

Germany 21

Indonesia 35

South Africa 44

Turkey 58

U.S. 68

Appendix

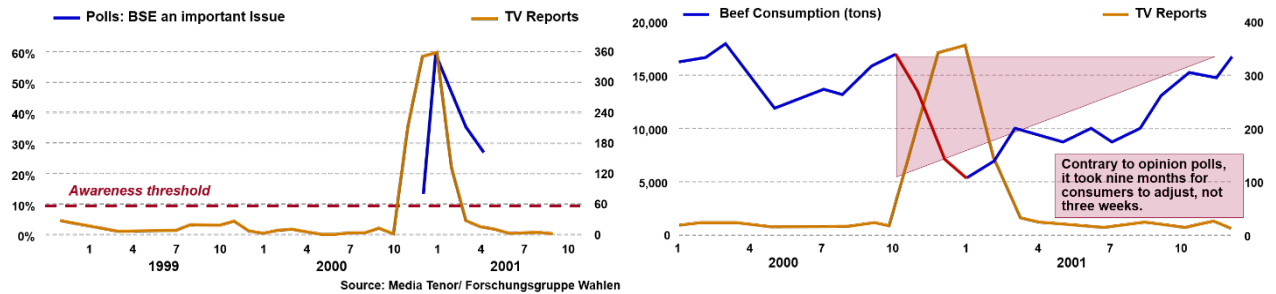
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Key Concept I: The Awareness Threshold

Step 1: When does an event resonate with the public?

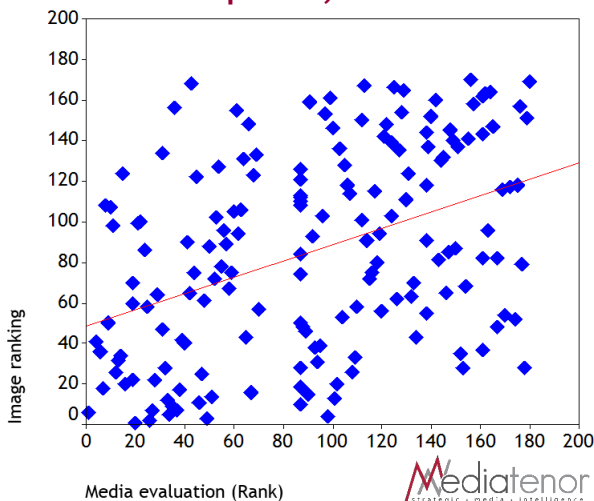
Media coverage of BSE in Germany, opinion poll and beef consumption 1999-2001



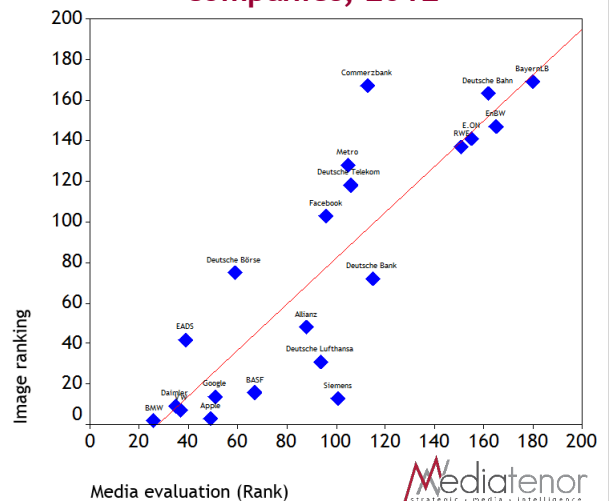
The example of mad cow disease shows that people begin to worry about an issue, when it gets at least 1.5% of news coverage over a protracted time. Without ongoing coverage it drops from the public agenda again. As issues compete for awareness, only some issues, like, e.g., unemployment, will stay on the media agenda over very long periods without sponsors from politics or society.

Step 2: How much coverage needs an organization or company?

Correlation between media tone and image ranking: 200 German companies, 2012



Correlation between media tone and image ranking: 21 most visible companies, 2012

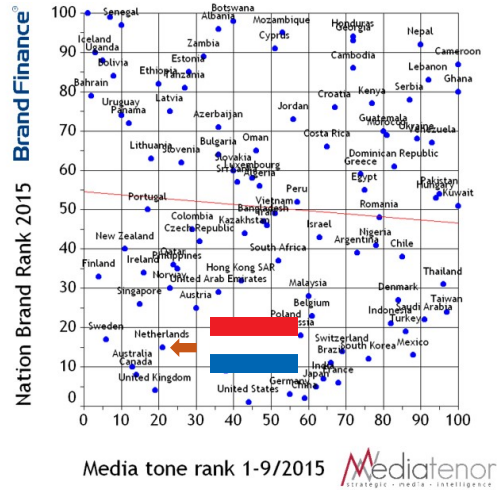
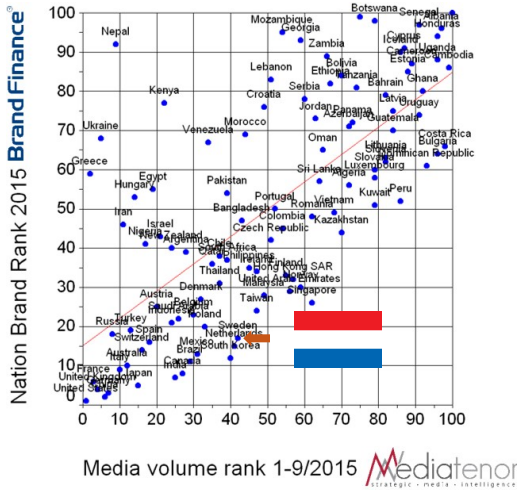


While there are only few polls measuring the awareness for companies, a study by Media Tenor and Prof. Schwalbach of Humboldt University Berlin has shown that the perception of a company is only significantly influenced by media coverage when a minimum level of constant coverage in opinion-leading media is reached - about 1-2 contributions per month on TV and in weeklies and 5-6 contributions per month in dailies.

Key Concept I: The Awareness Threshold

Media visibility predicts the nation brand value

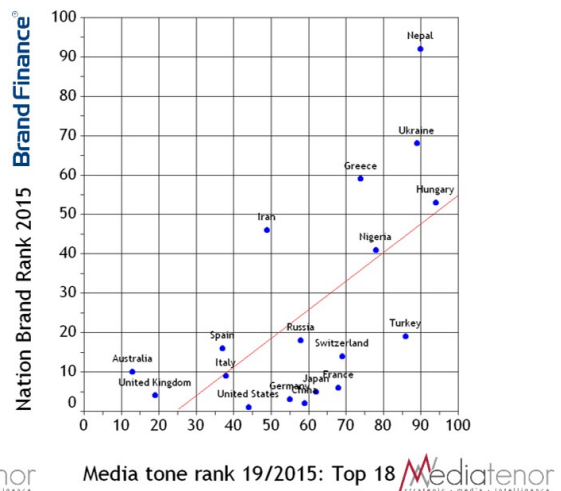
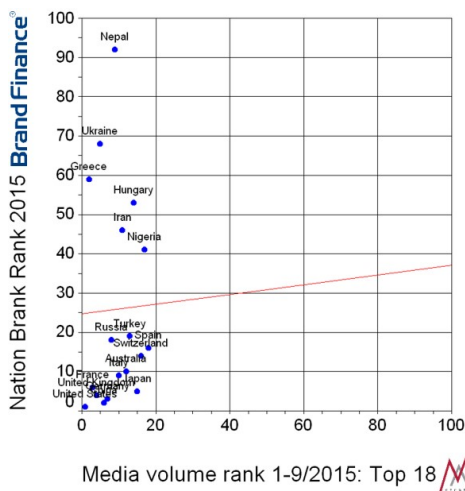
International TV coverage and Nation Brand Values, 2015



While the nation brand ranking of 100 states correlates well with the visibility of these countries in international TV news - $\rho=0.702^{**}$ - there is almost no covariance between the nation brand ranking and tonality of media coverage - $\rho=0.085$.

Only for the most visible nations, tone becomes important

International TV coverage and Nation Brand Rank Values: Top 18 countries (volume), 2015



Looking only at those countries that receive at least 2 stories per month and medium, visibility and brand rank get disconnected - $\rho=0.24$ - while the correlation between tone and brand value becomes stronger for these 18 countries with $\rho=0.635^{**}$.

Key Concept II: Tone

What does Media Tenor understand under “tone”?

Tone is the positive or negative description of a protagonist. Media Tenor does not analyze the description of facts per se, like, e.g., is war described in a positive or negative way? Moreover, Media Tenor does not judge the tone of coverage from its own perspective - the analysis takes the tone from the media source, either from persons or institutions that are quoted or from the journalist. Because the analysis of tone refers to protagonists the tone of all statements can be summarized.

Why does Media Tenor distinguish between explicit and implicit tone?

Media Tenor analyzes the overall favorable or unfavorable description of a protagonist. While the impact of openly positive or negative judgements, like, e.g., “hero” or “villain”, on the perception of a protagonist is obvious, the circumstances described matter as well. Reports about rising unemployment are a negative description of the economy, even when the report does not report this fact as a problem.

Why does implicit tone matter?

Reporting about unfavorable facts affects the perception of a protagonist - and particularly of a country. Reporting about crime or diseases affects tourism, even when no one is blamed for this. Coverage of “red tape” has a negative impact of FDI, even when no politician is named as responsible.

Are all expressions of tone unambiguous?

While many positive or negative statements are clear with reference to a protagonist, some of them depend on the position of the reader. Media Tenor codes these as “ambivalent”. Some expressions of tone relate to positive and negative aspects but cannot be decided, these are ambivalent as well. The context of the whole text is taken into account when the tone of an individual statement is coded.

What are the expressions of tone coded by Media Tenor

Media Tenor distinguishes between strongly and moderately positive and negative tone, ambivalent tone and neutral statements. Neutral statements convey a fact and have no bearing on the positive or negative perception of a protagonist, like, e.g., his date of birth. The individual expressions of explicit and implicit tone are condensed into the three values “positive / 1”, “negative / -1” and “no clear tone / 0”.

Media selection and search terms

Media selection

Media Tenor has selected the media outlets for this analysis based on the following criteria:

- **Opinion-leadership**
Based on the co-orientation of journalists, a limited number of opinion-leading media shapes the news selection and the trends in tonality for most other media. This can be measured, for example, by analyzing the citation patterns.
- **Reach**
National media outlets with a large audience. To underscore the importance of reach, Media Tenor has included TV sources for German, South Africa and the U.S.
- **Political orientation**
If possible, Media Tenor has included media outlets that represent the different strands of the political spectrum.
- **General public and professional public**
If possible, Media Tenor has included business papers in addition to general interest news media, in order to analyze the impact of reporting on business leaders.
- **Regional level**
As a wide range of the activities of Dutch PD and ICB addresses audiences on the regional level, Media Tenor has included regional newspapers in addition to opinion-leading national media outlets.

Search terms

Media Tenor has analyzed **all** news stories reporting about **Dutch protagonists** or the **Netherlands**. Additionally, activities of international companies in the Netherlands have been included as well, while reports about the international organizations based in the Netherlands (e.g., the ICT), have been excluded. These news stories have been sourced from media databases and websites based only on the references “Dutch”, “Netherlands” and “Holland” in the respective languages.

As a **criterion of relevance**, only stories that describe the Netherlands or Dutch protagonists in at least 5 lines (5 seconds in TV news) have been included into the analysis.

All sections of the media have been analyzed, with the exception of the sports pages. Sports news in other sections, e.g. on the title page, have been included.

No stories have been excluded on account of their subject matter, therefore allowing a more comprehensive analysis of topic structures. References to Dutch protagonists, which do not mention their origin, could not be found.

Media analysis = Coding

Human coders analyze the media content

Media Tenor's approach begins with 120 other-tongue media analysts examining each report in the opinion-leading media according to a comprehensive topical index which includes client companies, focus industries and selected political events. Each report's content is further encoded into an internationally networked database. Coded content includes the primary and secondary protagonists, primary and secondary topics, locations, explicit valuations, implicit ratings, sources' identities, genders, nationalities as well as other pertinent information. Some topical areas are coded in even greater detail, with each of these aspects fully documented for each statement within the report.

Inter-coder Reliability

Inter-Coder Reliability is the level of consistency in coding between media analysts. Media Tenor International guarantees at least 85% inter-coder reliability on results. This is an exceptionally high benchmark for industrial data (academia defines 70% as a "good standard"), minimizing the possible effect of personal opinion in the data. These checks are run on a quarterly basis, with results published in Media Tenor quarterly.

Research and Analysis

Media Tenor researchers then analyze the data for trends in the media cover-age. That is in terms of individual businesses, industry sectors, political events, countries' images and special research areas, such as environment/health, race, sustainable development, CSR and conflicts like wage negotiations. Media Tenor places this research into the context of overall media content trends as well. Individual media are each analyzed for general content trends and then compared to one another. The same analysis is also performed on overall types of media such as social media and online media, daily newspapers and television news programs, therefore providing an objective, comprehensive overview of media types and their relative influence.

Content analysis

Analysis on statement level

All statements about the Netherlands and all statements about the Dutch protagonists are to be taken into consideration.

Protagonists are the persons, groups or institutions that are described in the news.

A statement is a unit of written or spoken language defined by a combination of an analyzed subject (i.e. the protagonist to which the statement refers), a theme (i.e. the topic mentioned with regards to the protagonist), a tendency of presentation and a source.

Any change in

- analyzed protagonist
- topic
- tendency of presentation
- Source

represents a new statement.

Analysis on report level

TV news was analyzed on **report** level: All information about a protagonist is aggregated on the level of the *news story*. A news story on TV is defined by the style of presentation. An announcement by the anchorman and a film report on the same issue constitute two stories.

Protagonist and topic codes are compatible with the statement level analysis. TV news are analyzed completely. The relevance criterion of 5 seconds is applied here as well.

Analysis of tone

The analysis of the tone of coverage refers to the **coded protagonist**, in relation to the coded topic.

Media Tenor distinguishes between the **explicit tendency** (e.g. “bad”) and the **context valuation** (“is responsible for the death of many people”).

Explicit ratings are dependent on the presence and value of clearly judgmental or evaluative language (e.g. “good”, “bad”, “ominous”, “ridiculous”, “brilliant”)

Implicit ratings are based on contextual information and its impact on the opinion of the protagonist in the statement. Implicit ratings often fall in grey areas and should be considered in the context of the protagonist’s situation, not on the coder’s root definition of a given term. For example, the use of the phrase “inflexible” could be considered positive if it is used in reference to commonly accepted aims. However, if it implies that a religious leader has caused detriment to his followers through his “inflexible” conduct, the rating would be negative.

Coding application

Text example

EUROPE 33 COMMENTS

Lessons for U.S. From a Flood-Prone Land

By ANDREW HIGGINS NOV. 14, 2012

[Email](#)

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MARTIAN NOW PLAYING
GET TICKETS

LELYSTAD, the Netherlands — Entrusted with ensuring that the central Netherlands never suffers a calamity like the one visited on New York by [Hurricane Sandy](#), Willem van Dijk, guardian of the dikes in Flevoland, a Dutch province that is more than 12 feet below sea level, sends out 11 men each morning to combat a grave menace to the world's most advanced network of storm defenses.

Their mission is to kill muskrats. Using metal cages and spring traps baited with carrots, Flevoland's rodent hunters provide a low-tech but vital service in an elaborate and highly effective Dutch defensive system that includes flood-control techniques first developed in the Middle Ages and futuristic steel structures that, operated by computers, move to block storm surges when water levels rise too high.



The Netherlands has invested heavily in flood control projects like the Maeslantkering. Ivy Njoku/kijkjen for The New York Times

This text from the **New York Times** is coded for the following variables. The example refers to the headline of the story (the example shows the web version of the print story that was analyzed).

Coding mask

Medium Name	40101	New York Times	Mt-Archive	
Date	15 / 11 / 2012	15 Nov 2012	Article URL	
Headline	Lessons for U.S. From a Flood-Prone Land			
Page Number	6			
Article Number	1	Article Length	999	anderes Fomat
Style	3	report (more than 20 cm)	Section	11
Source/Journalist	10	20405039	Higgins, Andrew	politics&news, other pages
Cited (disabled)				
Cited Branch				
Cited Topic				Add More
Project				Add More
No FSC				Finish Cancel
Select coding form		9999	Political Coding	
Combined Article	Analyst Coding	Political Coding	Trace	MunichRE
				Cited Media
				Linde
				Wacker
				BundesBank
				Otto
				MTU
Party / Politician	214	1	Country in general	
Topic	8708	Hydrology, hydrography		
Explicit Rating	0	Neutral(0)	Positive(1)	More Positive(2)
Implicit Rating	0	Neutral(0)	Agree(1)	Agree More(2)
Time Reference	1	the present		
Area	214	Netherlands		
Source	00	00	All Journalists	
Remark				
Add				Cancel

Definition of the themes of analysis

- **Culture:**
All statements referring to arts, culture and education.
- **Creative industries:**
All statements about companies from the media, advertising, IT, education, entertainment, ISP, clothing, museum and trade fair industries, as well as skilled crafts and freelancers.
- **Peace & Justice/Rule of Law:**
All statements about international politics, law, domestic security and selected crimes that affect official institutions (police, corruption etc.).
- **Economy:**
All statements about economic issues (not business).
- **Europe:**
All statements about EU politics, the EURO, or referring to the EU or the Eurozone as a location.
- **Water/climate/energy:**
All statements referring to environmental and energy issues.

These definitions were used to group the total corpus of information into the themes. Media Tenor uses the following thematic groups to analyze the topic structure of the news about the Netherlands and Dutch protagonists:

- Party politics
- Domestic policy
- Crime/security
- Foreign policy/conflicts
- Economy
- Business
- Social policy
- Culture/society
- Environment/energy
- Internal affairs of NGOs/institutions
- Accidents/catastrophes
- Sports (the sports sections were not analyzed for this project)
- Other topics

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Media overview

Description of print media analyzed for Egypt

Medium	Top journalists	Audience	Print circulation	Web version	Political affiliation	Media type/ quality / language
Al Gomhuriah	no journalist identified	Audience is national and from some countries: Saudi Arabia, US, UAE, Kuwait	200,000 copies/ daily	alghomhuria.net.eg	Critics alleged that these newspapers served to celebrate the ruling regime, publish official government statements, and marginalize the political opposition. (Under President Hosni Mubarak)	Daily Arabic
AL Dostor	no journalist identified	Audience is national	February 2011: with a daily edition selling 45,000 and weekly edition selling 85,000 copies.	Aldostor.com	Al-Dostor is the most outspoken newspaper that criticized the regime and the government.	Daily – Weekly Arabic
Youm 7	no journalist identified	Audience is national and from some countries: Saudi Arabia, US, UAE, Kuwait	5.97 mil viewers daily Average female is higher. Most of viewers are in college	youm7.com	Youm7 is avowedly non-partisan and eschews affiliation with any religious, political, or social group.	Daily Arabic - English
Al Wafd	no journalist identified	Audience is national General audience	367,000 viewers daily	Alwafd.org	The media belongs to Wafd Party Political alignment: Opposition (Centre -right, National liberalism, Egyptian nationalism)	Daily Arabic
Al Ahram	no journalist identified	Audience is national and international General audience	1million circulation daily 1,2 million (Fridays)	Ahram.org.eg	It has often been accused of heavy influence and censorship by the Egyptian government	Daily Arabic
Watani	no journalist identified	Famous among Coptic diaspora and Egyptian Coptic Christian General audience		Wataninet.com	Focusing on Coptic issues, heritage and the development of Egyptian society	Weekly (Sunday) Arabic
Arab Finance	no journalist identified	Audience is national General audience	20,800 viewers daily Average male is higher. Most of viewers are graduate school	Arabfinance.com	ArabFinance.com was formed to meet a growing demand for online trading, transparent financial information, and financial services in Egypt and the Arab world.	Daily Arabic - English
Akher Saa	no journalist identified	National audience and Gulf countries-	145,500	dar.akhbarelyom.com	Government owned	Weekly (Wednesday) Arabic



Media overview

Description of the TV and print media analyzed for Germany

Medium	Top journalists	Audience	Print circulation	Web version	Political affiliation	Media type/ quality / language
ARD Tagesschau	Feld, Christian von Haaren, Marion Hofer, Jan Krause, Rolf-Dieter Rakers, Judith	no target age available Audience is national	8,96 Mio viewers 32% market share of viewers	tagesschau.de	Public service TV, no political affiliations. ARD is perceived to be centre left	Daily fifteen minutes German
ARD Tagesthemen	von Haaren, Marion Miosga, Caren Rakers, Judith Daubner, Susanne Schrüder, Thorsten	no target age available Audience is national	2,46 Mio viewers 11% market share of viewers	tagesschau.de	Public service TV, no political affiliations. ARD is perceived to be centre left	Daily half-hour German
ZDF heute	D' hondt, Ina Gerster, Petra Fornoff, Matthias Hahlweg, Barbara van Kampen, Udo	no target age available Audience is national	3,79 Mio viewers 17,1% market share of viewers	heute.de	Public service TV, no political affiliations. ZDF perceived center right	Daily twenty minutes German
ZDF heute journal	D' hondt, Ina Gause, Gundula van Kampen, Udo Wolf, Heinz Kleber, Claus	no target age available Audience is national	3,9 Mio viewers 14,2 % market share of viewers	heute.de	Public service TV, no political affiliations. ZDF perceived to be centre right	Daily half-hour German
Süddeutsche Zeitung	Kirchner, Thomas Gammelin, Cerstin Läsker, Kristina Schneider, Jens Pschak, Ecelyn	no target age available Audience is national	392,204 (Monday-Saturday) Reach: 1,13 Mio	sz.de	SZ is perceived as left-wing/ liberal	Daily (Monday to Saturday) German
Welt	Savelberg, Rob Getsler, Bob Wüpper, Gesche Wetzel, Daniel Brech, Sarah Maria	65% male 59% aged 30-59 Audience is national	200,577 (Monday-Saturday) Reach: 698,000	welt.de	Welt is perceived as conservative	Daily (Monday to Saturday) German
FAZ	Stabenow, Michael Lühmann, Hannah Schuemer, Dirk Ross, Andreas Strobel y Serra, Jakob	63% male Age: □ 52,8 Audience is national	277,314 (Monday-Saturday) Reach: 680,000	faz.net	FAZ is perceived as strongly conservative	Daily (Monday to Saturday) German
Rheinische Post	Goertz, Wolfram Goldluecke, Regina Haas-Pilwat, Dagmar Steeg, Lena Puzalowski, Julia	47% male 70% aged 30-59 Audience is local	315,598 (Monday-Saturday) Reach: 827,000	rp-online.de	Rheinische Post is perceived as conservative	Daily (Monday to Saturday) German
Stuttgarter Zeitung	Hetzel, Helmut Keck, Christine Wal, Oene van der Ziedler, Christopher Fritz-Kador, Brigitte	47% male 51% aged 30-59 Audience is local	188,889 (Monday-Saturday) Reach: 508,000	stuttgarter-zeitung.de	Stuttgarter Zeitung is perceived as conservative	Daily (Monday to Saturday) German
Handelsblatt	Flaiger, Jürgen Kapalschinski, Christoph Berschens, Ruth Herz, Carsten Hanke, Thomas	82,5% male Age: □ 48,8 Audience is national	122,939 (Monday-Friday) Reach: 432,000	handelsblatt.com	Handelsblatt is perceived as liberal	Daily (Monday to Friday) German
Spiegel	Schult, Christoph Hardinghaus, Barbara Knöfel, Ulrike Pauly, Christoph Kühn, Alexander	67,1% male 46,4 age 50+ Audience is national	822,761 Reach: 6,11 Mio	spiegel.de	Spiegel is perceived as left-wing/ liberal	Weekly (every Saturday) German Multi-award winning, highly respected
Focus	Weikard, Andre Schweighofer, K. Czoeppan, G. Moritz, Hans-Jürgen Schuster, Jochen	no target demographics available Audience is national	501,504 Reach: 4,18 Mio	focus.de	Focus is perceived as bourgeois liberal	Weekly (every Saturday) German
Zeit	Krupa, Matthias Albrecht, Harro Vorholz, Fritz Brost, Marc Bittner, Jochen	59% male 50% aged 30-59 Audience is national	503,814 Reach: 1,66 Mio	zeit.de	Zeit is perceived as left-wing/ liberal	Weekly (every Thursday) German
Bild-Zeitung	Fest, Nikolaus Schönburg, Alexander von Driese, Patricia Schneider, Frank Varro, Dora	65% male no age target available Audience is national	2,219,739 Reach: 10,53 Mio	bild.de	Bild is perceived as populist	Daily German Considered sensationalist

■ positive ■ no clear tone ■ negative



Media overview

Description of print and online media analyzed for Indonesia

Medium	Top Journalists	Audience	Print circulation	Web version	Political affiliation	Media type / quality / language
Bali Post	no journalist identified	Audience is Bali area	2,740	balipost.co.id	In 1965, it was affiliated with Partai Nasionalis Indonesia (PNI), the biggest party in Bali at that time	Daily/Indonesian Good reputation Poorly connected in respect to any social network A fully trustworthy domain
Bisnis Indonesia	no journalist identified	Audience is national and from select countries: US, Malaysia, Singapore, Russia	510,000	Bisnis.com	This is a business daily newspaper	Daily/ Indonesian Good reputation Moderately connected in respect to social networks A safe domain
Jakarta Post	Santoso, Aboeprijadi, Cahyafitri, Raras Ririhena, Yohanna Dewi, Sita W Natahadibrata, Nadya	70% male 30% female Audience are Indonesian business people, well-educated, Indonesians, and foreigners (US, Singapore, India, Malaysia)	~40,000 daily	The jakartapost.com	A vocal pro-democracy point of view	Daily/English The largest English language newspaper in Indonesia A fully trustworthy domain
Jawa Pos	no journalist identified	Audience is national and from Singapore	400,000	Jawapos.com		Daily/ Indonesian The largest daily in East Java Has won some awards Excellent reputation A fully trustworthy domain
Kompas	no journalist identified	Audience is national and from select countries: Singapore, Australia, Malaysia, Netherlands	Average of 500,000 610,000 (Sunday)	Kompas.com	Neutral As a Catholic-affiliated newspaper, Kompas defends Christian interests	Daily/ Indonesian The most widely read newspaper in Indonesia, being the only newspaper covering 33 provinces of the country Has a reputation in Indonesia for high-quality writing and investigative journalism
Kontan	no journalist identified	Audience is national and from some countries: Singapore, US	257,000 daily	kontan.co.id	These are business daily and weekly newspapers	Daily/Indonesian
Koran Tempo	no journalist identified	Audience is national and from US, Malaysia, Singapore, Australia	591,000	Tempo.co	Under the "New Order" of President Suharto, the publishing of Tempo magazine was banned. The magazine has continued its independent position.	Weekly/ Indonesian Excellent reputation Moderately connected in respect to social networks A fully trustworthy domain with mostly positive visitor reviews
Sindo	no journalist identified	National and 9 provincial editions	336,000	koran-sindo.com	Affiliated to the private RCTI TV station	Daily, Indonesian

■ positive ■ no clear tone ■ negative



Media overview

Description of the TV and print media analyzed for South Africa

Medium	Top journalists	Audience	Print circulation	Web version	Political affiliation	Media type / quality / language
SABC 1 Zulu/Xhosa News	Jonas, Sisanda Langa, Vusiwe	National Targets primarily ages between 15-34 speaking Nguni languages.	TV program 3.7 million viewers	http://www.sabc1.co.za/sabc/home/sabc1	The SABC is the state broadcaster of South Africa. Although it has never explicitly stated that it is aligned to the ANC, this is something that the SABC has been criticized for.	Zulu/Xhosa The news on SABC 1 alternates. Some nights it is presented in Zulu while on others it is presented in Xhosa.
SABC 2 Afrikaans News	April, Terrence Zunckel, Liezl	National SABC 2 caters to both middle and high end markets for viewers speaking Sotho, Afrikaans, Venda, Tsonga and English.	TV program 797,000 viewers	http://www.sabc2.co.za/sabc/home/sabc2	The SABC is the state broadcaster of South Africa. Although it has never explicitly stated that it is aligned to the ANC, this is something that the SABC has been criticised for.	Daily 30 minutes Afrikaans
SABC 2 Sotho News	Seleso, Lebeko	National SABC 2 caters to both middle and high end markets for viewers speaking Sotho, Afrikaans, Venda, Tsonga and English.	TV program 1.1 million viewers	http://www.sabc2.co.za/sabc/home/sabc2	The SABC is the state broadcaster of South Africa. Although it has never explicitly stated that it is aligned to the ANC, this is something that the SABC has been criticised for.	Daily 30 minutes Sotho
SABC 3	Ndoro, Peter Chetty, Vabakshnee Burke, Simon	National Targeted at mostly affluent English-speaking citizens. Target market are viewers aged between 18-49.	TV program 705,000 viewers	http://www.sabc3.co.za/sabc/home/sabc3	The SABC is the state broadcaster of South Africa. Although it has never explicitly stated that it is aligned to the ANC, this is something that the SABC has been criticised for.	Daily 30 minutes English
eNews Prime Time	Masinda, Ronald	National Targeting the higher LSM groups across a variety of languages.	TV program 751,000 viewers	www.etv.co.za	E-TV has no political affiliation	Daily 30 minutes English
Cape Times	Delonno, Peter Weaver, Tony Buthelezi, Londiwe Hazelhurst, Ethel Pressly, Donwald	Audience is provincial: West ern Cape	Newspaper 234, 000 readers	www.capetimes.co.za	Print media in SA are not considered to have any political affiliations.	Daily English
The Star	./.	Audience is provincial - Johannesburg	Newspaper 602, 000 readers	www.iol.co.za/the-star	Print media in SA are not considered to have any political affiliations.	Daily English
Business Day	Allix, Mark Haw, Penny Cole, Madden Hedley, Nick Anderson, Alistair	Audience is national	Newspaper 62, 000 readers	www.bdlive.co.za	Print media in SA are not considered to have any political affiliations.	Daily English
The Sunday Times	Nooy, Richard de Simuchoba, Arthur Sassen, Robyn Ash, Paul	Audience is national	Newspaper 3,738,000 readers	www.timeslive.co.za/sundaytimes	Print media in SA are not considered to have any political affiliations.	Weekly English
Cape Argus	Lewis, Anel Mposo, Nontando	Audience is provincial - Western Cape	Newspaper 358,000 readers	www.iol.co.za/cape-argus	Print media in SA are not considered to have any political affiliations.	Daily English
Mail & Guardian	Traynor, Ian Chrisafis, Angelique Malan, Mia	Audience is National	Newspaper 555,000 readers	www.mg.co.za	Print media in SA are not considered to have any political affiliations.	Weekly English
Sowetan	Khumela, Fhumulani Justice Said, Nick	Audience is National	1,611,000 readers	www.sowetanlive.co.za	Print media in SA are not considered to have any political affiliations.	Daily English
City Press	Klein, Marcia Van Rensburg, Dewald Armstrong, Drew Kitamura, Makiko	Audience is National	1,761,000 readers	http://www.news24.com/City-Press/	Print media in SA are not considered to have any political affiliations.	Weekly English
Beeld	Tempethoff, Elise Prince, Llewellyn Van Rooyen, Fanie	Audience is National	384,000 readers	http://www.netwerk24.com/nuus/redirect_from=beeld	Print media in SA are not considered to have any political affiliations.	Daily Afrikaans
Rapport	Botha, Eddie	Audience is National	1,065,000 readers	media24.newspaperdirect.com/epaper/viewer.aspx?newspaper=rapport	Print media in SA are not considered to have any political affiliations.	Weekly English

■ positive ■ no clear tone ■ negative

Media overview

Description of the print media analyzed for Turkey

Medium	Top journalists	Audience	Print circulation	Web version	Political affiliation	Media type / quality / language
Milliyet	no journalist identified	Average age: 50 / Audience is both national and local	158,075	milliyet.com.tr	Kemalism, Secularism, Centre-left	Daily Turkish
Cumhuriyet	no journalist identified	Average age: 55 / Audience is national	53,049	cumhuriyet.com.tr	Social Democracy, Kemalism, Secularism	Daily Turkish
Hürriyet	Oeztuerk, Uenal Aydin, Cetin	Average age: 49 / Audience is both national and local	363,748	hurriyet.com.tr	Mainstream, Liberalism Secularism, Centre-Left	Daily Turkish
Zaman	Livaneli, Unal	Average age: 35 / Audience is national	991,010	zaman.com.tr	Gülenism, Islamic, Right-Wing	Daily Turkish
Habertürk	Boerekci, Guelenay Yilmaz, Ozlem Kivanc, Ahmet	Average age: 45 / Audience is national	119,224	htgazete.com.tr	Nationalism, Conservatism, Right-Wing	Daily Turkish
Posta	Holligan, Anna Irepoglu, Gül Ozkan, Yusuf	Average age: 49/Audience is national	396,716	posta.com.tr	Mainstream, Tabloid	Daily Turkish
Today's Zaman	no journalist identified	Average age: 35 / Audience is business executives	8,686	todayzaman.com	Gülenism, Islamic, Right-Wing	Daily English
Sabah	no journalist identified	Average age: 50 / Audience is both national and local	308,341	sabah.com.tr	Pro-AKP, Social conservatism, Centre-Right	Daily Turkish
Aksam	no journalist identified	Average age: 55 / Audience is national	101,851	aksam.com.tr	Pro-AKP, Centre-Right	Daily Turkish
Esenler Haber	no journalist identified	Average age: 60 Audience is local	113,417	www.esenlerhaber.com		Daily Turkish
Akdeniz Haber	no journalist identified	Average age: 60 / Audience is local	n.a.	akdenizhaber.com.tr		Daily Turkish
Dünya	no journalist identified	Average age: 40 / Audience is business executives	58,309	dunya.com	Business, Financial	Daily Turkish

■ positive ■ no clear tone ■ negative



Media overview

Description of the TV and print media analyzed for the U.S.

Medium	Top Journalists	Audience	Print circulation	Web version	Political affiliation	Media type / quality / language
FOX News	Harrigan, Steve Wallace, Chris	Average age: 68 Audience is national	TV program 1.7 million viewers nightly	FoxNews.com	Media in the U.S. are not considered to have political affiliations. However, Fox News is perceived as strongly conservative	Daily 1-hour / English
CBS News	Pelley, Scott Palmer, Elizabeth	Average age: 64 Audience is national	TV program 6 million viewers nightly	CBSNews.com	Media in the U.S. are not considered to have political affiliations. However, CBS News is perceived as slightly conservative	Daily half-hour / English
NBC News	Williams, Brian Golostani, Duncan	Average age: 62 Audience is national	TV program 8.3 million viewers nightly	NBCNews.com	Media in the U.S. are not considered to have political affiliations. However, NBC News is perceived as slightly liberal	Daily half-hour / English
The New York Times	Higgins, Andrew Shorto, Russell Kanter, James Schuetze, Christopher F. Barnard, Anne	61.5% male 79.1% age 35+ Audience is both national and local	2,178,674 (Monday-Friday), 2,624,277 (Sunday)	NYTimes.com	Media in the U.S. are not considered to have political affiliations. However, The New York Times is perceived as somewhat liberal	Daily / English Multi-award winning, highly respected
The Washington Post	Faiola, Anthony Dollar, Steve Hesse, Monica Morris, Loveday Mufson, Steven	54% male 55.2% age 35+ Audience is both national and local	417,727 (Monday-Friday); 621,032 (Sunday)	WashingtonPost.com	Media in the U.S. are not considered to have political affiliations. However, The Washington Post is perceived as somewhat liberal	Daily / English Multi-award winning, highly respected
The Chicago Tribune	Deutsch, Anthony Steves, Rick Frankel, Todd von Rhein, John Ferry, Peter Markoutsas, Elaine	48.9% male Average age: 45.2 Audience is Chicago and the Great Lakes region	1,018,000 circulation (Sunday)	ChicagoTribune.com	Media in the U.S. are not considered to have political affiliations. However, The Chicago Tribune is perceived as somewhat liberal	Daily / English Has won some awards
The Wall Street Journal	Marcus, J. S. van Tartwijk, Maarten Fowler, Tom Mock, Vanessa Dalton, Matthew	67.7% male Average age: 45.4 Audience is business executives and New York City area	1,896,000 circulation	WSJ.com	Media in the U.S. are not considered to have political affiliations. However, The Wall Street Journal is perceived as conservative	Daily / English Multi-award winning, highly respected
The Boston Globe	Smee, Sebastian Wright, Chris Ailworth, Erin Matchan, Linda Weininger, David	50% male 73% age 45+ Audience is Boston and the surrounding area	634,600 circulation	BostonGlobe.com	Media in the U.S. are not considered to have political affiliations. However, the Boston Globe is perceived as liberal	Daily / English Has won some awards
The Los Angeles Times	Chu, Henry McDonnell, Patrick J. Bulos, Nabih Collins, Scott Kaplan, Karen	50.7% male Average age: 43.7 Audience is Los Angeles metro area	1,389,000 circulation (Sundays)	LosAngelesTimes.com	Media in the U.S. are not considered to have political affiliations. However, The Los Angeles Times is perceived as liberal	Daily / English Has won some awards
The New York Post	Rosenbaum, Sophia Cahalan, Susannah Hoffman, Barbara Atkinson, Claire Adams, Cindy	64% male No age data available Audience is New York City	414,139	NewYorkPost.com	Media in the U.S. are not considered to have political affiliations. However The New York Post is perceived as conservative	Daily / English Considered sensationalist
Newsweek	di Giovanni, Janine Varadarajan, Tunku Jukes, Peter Aml, Benny	55.3% male Average age: 44.8 Audience is national	3,267,000 circulation	Newsweek.com	Media in the U.S. are not considered to have political affiliations. However, Newsweek is perceived as slightly liberal	Weekly / English Respected general interest publication
Time	Gumbel, Peter Cendrowicz, Leo Katz, Andrew Mayer, Catherine Walsh, Brian	52% male Average age: 49 Audience is national	16,613,000 (total audience, reflecting multiple readers per issue)	Time.com	Media in the U.S. are not considered to have political affiliations. However, Time is perceived as slightly conservative	Weekly / English Respected general interest publication
U.S. News and World Report	no journalist identified	59.8% male Average age: 45.5 Audience is national	2,132,000 circulation	USNews.com	Media in the U.S. are not considered to have political affiliations. However, U.S. News and World Report is perceived as somewhat conservative	Digital Only with daily updates and occasional print special editions. English Respected general interest publication

■ positive ■ no clear tone ■ negative

Reputation and its risks

Harvard Business Review, 2007

“Executives know that their company’s reputation affects their ability to deliver performance both now and in the future. Companies with a strong positive reputation attract better people and are perceived as providing more value in their products and services, which often allows them to charge a premium for them. Their customers are more loyal and buy a broader range of products and services. Because the market believes such companies will be able to deliver sustained earnings and future growth, they have a higher price-earnings multiple and market value and a lower cost of capital. However, in an economy where 70% to 80% of market value comes from hard-to-assess intangible assets such as brand equity, intellectual capital, and goodwill, companies are especially vulnerable to anything that damages their reputation.

Most companies, however, do an inadequate job of managing their reputations. They fail to recognize that reputational risk is a distinct, corporate-wide category of risk and, instead, tend to mistake their process for handling threats to their reputations that have already surfaced, usually publicly, as satisfactory process. This is not risk management; it is crisis management. While companies have become sophisticated in managing crises, it is a reactive approach to limit the damage. In contrast, reputational risk management is a proactive process.”

ROBERT ECCLES, ROLAND SCHATZ

in Harvard Business Review, 2007/1



Testimonials on Media Tenor

Business experts on the importance of reputational issues

“Without the support of Media Tenor our work would not have been understood by the world leaders on one hand and the general public on the other.”

PETER EIGEN, Former President Transparency International

“Journalists have an extreme impact on what is going on in the world. Therefore we need a watchdog for us watchdogs. I am grateful that Media Tenor serves this need from a scientific approach but with a strong journalistic understanding.”

FRED KEMPE, Former Editor in Chief, Wall Street Journal, Current President at The Atlantic Council of the United States

“Strategic Media Relations needs a clear and independent seismograph telling us in advance where the weaknesses of our external communications are. Media Tenor serves on a global level with their continuous qualified analysis of traditional media as well as monitoring the internet.”

RICHARD GAUL, Head of Corporate Communications 1985 - 2006, BMW

“Daily reports on the media coverage, and expert analysis of the areas of our strengths and weaknesses allowed us to tailor our coverage accordingly; to refocus our efforts on the desired messages and on the sections of the media where we were not being so successful. Without the fine work of Media Tenor that could never have been done effectively.”

DR. MICHEL OGRIZEK, International Communications Consultant, Paris

“Media Tenor International provides a unique way for a company to compare the message it is intending to send with the message that is getting heard. Those companies who are committed to greater transparency will find Media Tenor an invaluable tool for improving communications to their shareholders and other stakeholders. Media Tenor is also a useful tool for investors since it enables them to assess the risks to reputation and brand of their portfolio companies.”

PROF. DR. ROBERT G. ECCLES, CEO Perception Partners, Inc.

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