Medienmonitor Schweiz 2023

Summary

In 2023, *Medienmonitor Schweiz* examines for the seventh time the roles played by the media in forming opinions in Switzerland, while documenting the balances of power and business ties in the media market. Compared with the previous year, the media, particularly the strongest brands, once again lost some of its reach and opinion-forming power. For the first time since measuring began in 2017, the online and social media categories lost some of their opinion-forming power to TV and print. The greatest market concentration in terms of the media corporations' opinion-forming power was again found in the Bern media region. However, the conditions for a balanced formation of opinion among the population are still met.

Methodological information

***Medienmonitor Schweiz 2023* combines three survey modules and brings together data from a multitude of sources:**

1) Representative sample online survey about the importance of 181 Swiss media brands when it comes to forming individual opinions (N=4,700)

2) Secondary analysis of recognised Swiss baseline surveys on the daily reach of media brands (radio/TV: Mediapulse, print: WEMF, social media and online: own survey and projection)

3A) Secondary analysis of sector studies and business reports on the economic weight of the key players in the Swiss media market

3B) Ongoing market monitoring and documentation of ownership and contribution structures in the Swiss media landscape

Media diversity and opinion formation in Switzerland

Medienmonitor Schweiz aims to measure media diversity and the potential for the free forming of opinions within Switzerland. For a democracy to function, the population must be able to form balanced opinions. As a platform for content and opinions, the media plays a significant role in opinion-forming processes.

Since the 1960s in particular, the Swiss media sector has undergone major changes, reflected in an ongoing **process of concentration**. This tendency has also been accentuated in recent times by the **digital transformation** of society and the media. Against this backdrop, the question arises as to how these developments affect available media and companies, and the opportunities to form opinions freely in Switzerland.

Each year *Medienmonitor Schweiz* supplies a factual and systematic basis for the evaluation of the media landscape in Switzerland and, in particular, of the free forming of opinions. The study 2023 collects information concerning the **opinion-forming power** of **181 media brands** and **ten media corporations**

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in the national market, three regional language and 14 local regional markets. It documents the business ties and economic balances of power within the Swiss media market. Five regional online brands were added to the study sample in 2023. No brands were removed for the year under review.

To determine **opinion-forming power**, media users evaluate the performance of the brands as an information medium in a representative sample survey. This qualitative evaluation is combined with the daily reach of the available media as identified by the official Swiss coverage studies for TV, radio, and print and by internal surveys and projections for online and social media. This results in an indexed performance number for opinion-forming power, which represents the relative **potential** of media brands to have opinion-forming effects. With the 2023 study period, results are now available for the **seventh time**.

Medienmonitor Schweiz measures the **concentration of opinion-forming power** using the established **Herfindahl-Hirschman Index (HHI)**, which is also used by US antitrust authorities to assess the balance of power in competition. A high concentration of opinion-forming power may be an indication that opinion formation is at risk.

Combined opinion-forming power falls to pre-coronavirus levels

In 2023, the **combined opinion-forming power** of all the brands in Medienmonitor Schweiz fell for the third year running, albeit slightly less sharply than in the previous two years, with a **two percentage point decrease**. This steady erosion means that, during 2023, the Swiss population returned to roughly the level that prevailed before the coronavirus pandemic in terms of its reliance on the media as a source of information.

In terms of the **media brands with the most opinion-forming power and reach**, there were some shifts during 2023, although no clear trend emerged. Instagram continues to grow, which for the first time means that, together with **YouTube** and **Instagram** (after 20 Minuten), two social media brands are among the three offerings with the greatest national opinion-forming power. Aside from TikTok, whose growth slowed considerably, the first Swiss Broadcasting Corporation (SRG) TV programmes SRF 1, RTS 1 and RSI LA 1 grew comparatively strongly. On the other hand, a significant proportion of media brands with opinion-forming power within the 18 regions recorded losses, including Facebook, Neue Zuercher Zeitung, LaRegione, La 1ère, Tages-Anzeiger, watson and SRF 2.

This mixed development does not indicate that the gap between the opinion-forming power of the larger and smaller media brands has widened year-on-year. This is also confirmed by the Herfindahl-Hirschman Index (HHI), which indicates a **low market concentration** in all 18 regions surveyed. Compared with 2022, no noticeable shifts were identified. In all regions, a relatively large number of at least 29 different brands are still accessible. As in previous years, *Medienmonitor Schweiz 2023* therefore also confirms that **individual brands do not pose a threat** to diversity of opinion.

Less concentrated markets due to brand systems

As the range of media brands does not single-handedly guarantee plurality of opinion or content, the analysis of concentration on the basis of individual offerings falls short of the mark. This is because the largest **brand combinations**, which generally maintain a central editorial office for supra-regional content, or a similar system, can develop influential opinion-forming power through the consistent realisation of the network potential, which far exceeds the individual brands. **SRG SSR**, with its German-language offering (SRF), has by far the largest brand system. This is followed by the combinations of **Meta**, **20 Minuten,** RTS, the **CH Media** radio/TV/online service and the Swiss German print brand systems from **TX Group** and CH Media.

When calculating the Herfindahl-Hirschman Index (HHI) based on these **brand systems** and the remaining individual brands, all 18 Swiss media brands analysed remain below the 1,500-point limit considered critical in terms of market concentration and are therefore considered to be **less concentrated**. The highest concentration value due to brand systems was in the **Bern** media region, with 1,308 points. Compared with the previous year, a decrease in market concentration was observed in 14 of the 18 areas. The only increases in market concentration were in the Mittelland and Zürich/See regions.

Six media regions with moderate market concentration from a corporate perspective

Ten major media corporations operate within the Swiss media market, alongside numerous other providers. **SRG SSR** clearly holds the greatest opinion-forming power, with a share of 28%. The number two, **TX Group**, achieved an index value under half that of the market leader (14%). The combined influence of the two largest media companies is therefore exactly the same as in 2022. This is followed by Swiss German regional media company **CH Media** with 10% share of the national opinion-forming market, US corporation **Meta** with 8% and **Ringier** with 5%. The remaining corporations (NZZ-Mediengruppe, AZ Medien, Gruppo Corriere del Ticino, Somedia, and ESH Médias) again have significantly lower shares. Taken together, the ten largest companies control 105 of the 181 brands in Medienmonitor Schweiz; the remaining 76 have a variety of different owners. Similar to brand systems, media companies can also negatively impact the plurality of opinion. Aside from the centralised product of content, there is the risk that corporations will also enforce editorial requirements across all media, for example, to enable a certain angle and tone of reporting to break through.

In the 18 regions analysed, the competitors converge in varying proportions. The HHI index for **media corporations** is still clearly above the values for brand combinations or even individual brands in 2023. In most cases, the absolute level of concentration is not a cause for concern, as 12 of the 18 regions studied are also **less concentrated** from a corporate perspective. Since 2022, the market concentration has decreased in half of the regions studied. Overall, **six media regions** surpass the 1,500-point threshold and are therefore considered to be **moderately concentrated**, although in most cases only slightly. The most pronounced is the market concentration in the **Bern** media region**, with 1,611 points**. After that, the threshold is crossed more clearly solely in **Graubünden** and **Zentralschweiz**. In the **Hochalpen**, the situation initially declined further but has eased again. On the whole in these areas there is a **concentration of power** among the two largest corporations (SRG SSR and TX Group and CH Media respectively), and the proportion of **independent media brands** is comparatively small, which is usually conducive to market concentration.

Slightly reduced concentration of power, challenging digitalisation

From a **media type perspective**, there were some interesting and rather **unexpected developments**. As the strongest media type, **online** has to accept a broad **decline** in opinion-forming power for the first time since measuring began, and **social media** also **stagnates** compared with the previous year losing ground quite significantly, particularly in French-speaking Switzerland. **TV**, which grew in almost every region, was able to profit from this, and even **print** increased its share of opinion-forming power – a first for Medienmonitor. There are also signs that the **long-term trend** towards newer, digital media **slowed** somewhat during 2023. In the case of TV and social media, there are also indications of a slightly less steep age pyramid. This means that the differences between old and young tend to be slightly smaller. However, these trends remain to be confirmed in the coming years. The observation that ever larger parts of the relevant opinion-forming market are moving away from the direct **sphere of influence of Swiss media promotion** has at best been somewhat dampened, not resolved.

Medienmonitor Schweiz once again confirms the **functional capacity** of the Swiss media system, which continued to ensure the conditions for the free formation of opinion to a great extent in 2023. However, the balance of power varies from region to region and the extent of media concentration is reaching problematic levels in certain regions.

Medienmonitor Schweiz will continue to observe the developments of the media landscape and opinion formation in Switzerland on an annual basis. The **study website** visualises the core findings, documents market structures and current events: **www.medienmonitor-schweiz.ch**