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Media Knowledge

Medienmonitor Schweiz 2018

Summary

In 2018, *Medienmonitor Schweiz* examines for the second 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. In 2018, the Swiss media sector also ensured the balanced formation of opinions of the Swiss people. Nevertheless, on an annual comparison, certain concentrations, which are hardly beneficial to Switzerland's media landscape and the formation of opinion in the long term, increased.

Methodological information

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

1) Representative sample online surveys about the importance of 176 Swiss media brands when it comes to forming individual opinions (N=4,828)

2) Secondary analysis of recognised Swiss baseline surveys on the daily reach of media brands (Radio / TV: Mediapulse, Print: WEMF, online: NET-Metrix)

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 as the focal point

Democracies depend on the population being able to form free and **balanced opinions**. To ensure the proper functioning of political processes and social cohesion, it is vital that citizens have access to relevant information and that they are able to get this information from the widest variety of sources possible. Therefore, states encourage institutional media diversity in order to guarantee diverse content and a **plurality of opinions.**

In **Switzerland**, where multilingualism, compact spaces and federal structures have led to a highly segmented media landscape, **media subsidies** have been granted in the broadcasting sector. This applies in particular to the predominantly fee-financed SRG SSR, as well as to certain private broadcasters of local regional radio and TV channels. The system is broadly accepted and has proven to be a success over the decades. Nevertheless, the Swiss media's **ability** to safeguard opinion formation has been **called into question** time and time again in light of ongoing convergence, accelerated concentrations, changing usage habits and the decline in quality, which is regularly held against the media's reporting.

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 collects information concerning the **opinion-forming power** of around **176 media brands** and new **media corporations** in national, regional language and 14 local regional markets and documents the business ties and economic **balances of power** in the Swiss media market. To determine the power of opinion formation, 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 offers identified by the official Swiss coverage studies. This results in an indexed performance number for opinion-forming power, which represents the relative **potential** of media brands to have opinion-forming effects. After being conducted for the first time in 2017, the results are now ready for the second time.

The Swiss media landscape guarantees a diversity of opinions

In 2018, the survey shows again a diverse and effective Swiss media landscape which, to a large extent, **fulfils** its societal function of **ensuring a diversity of opinions**, despite difficult market conditions and certain potentially damaging concentration tendencies. Even if the choice of information media is significantly greater for the German-speaking audience in Switzerland than for the French-speaking, and particularly for the Italian-speaking population, in all areas surveyed (national, three linguistic regions and 14 local regional media spaces), there are **sufficient alternatives** available to meet information needs from a variety of sources.

The results give **no indication that there is an acute risk** to the free forming of opinions in Switzerland in 2018 either, whereby individual media brands or corporations would be in a position to shape national, regional language or local regional opinion formation through applying undue charges. This is the case even though the first public TV channels in the French- and Italian-speaking regions of Switzerland fairly reach an opinion-forming power threshold value of 50 index points and can claim that almost half of the population consume their information each day (the maximum value is 100 index points).

20 Minuten and SRG SSR channels shape opinion formation

The lowest risk is found on the **national level**, as Swiss media brands generally orient themselves towards one language market or to an even smaller region, which has led to the differentiation of multiple relevant media markets. As such, in Switzerland no single provider clearly ranks top or dominates as a majority medium. Once again, the free multi-lingual commuter newspaper **20 Minuten** is the national **leader** when it comes to forming opinions. In **all regions of Switzerland**, **SRG SSR** is by far in the strongest position: with both regional language TV programmes occupying the top spot and radio programmes in third place, the public broadcaster is at the top of the regional rankings. Apart from that, SRG SSR also benefits most from the **general strengthening of online** and presents the year's rising star influencer No. 1 with srf.ch.

As in 2017, Switzerland's **private media providers** represent around half of the offers, which have the most opinion-forming power in all regions and smaller media spaces, but – with the exception of 20 Minuten – they only rank a few times among the top. Depending on the media space, two to four **regional media brands** (mostly print or radio) hold a strong position and therefore contribute to the diversity of opinions. By contrast, the **foreign TV programmes are largely on the losing side** – especially the privately owned channels.

SRG SSR also leads the field in most of the 14 local-regional **media spaces**, with the exception of the Geneva, Zurich/lake and St. Gallen areas, where 20 minutes resp. 20 Minuten secures the top position. In addition, two to four **regional media outlets**, mostly print or radio brands, hold a strong position in the distribution area and therefore increase the **diversity of opinions**.

For the first time, *Medienmonitor Schweiz 2018* has made a projection for the opinion-forming power of the **social media**: Nationwide and in German-speaking Switzerland, they only represent approximately 10% of the entire opinion-forming power, with the number being a little bit higher in Ticino. By contrast, in **French-speaking Switzerland**, social media represents a whopping **16%** of the regional language opinion-forming power and thus **not much less than the print media**. However, these numbers should be generally taken with a pinch of salt, as there is no official reach data about social media available.

Concentration tendencies and corporate duopoly shape media landscape

The continuing **concentration tendencies** in the Swiss media sector are clearly manifesting themselves: Tamedia ceased the publication of the print edition of **Le Matin** as of the end of July 2018 and in December, Ringier, too, announced that the **Blick am Abend** would no longer be available in print format. Since then, the two brands published in the regional language have only been available online, which has led to a massive decline in reach and opinion-forming power. The Italian-language **Giornale del Popolo** suffered an even worse fate – it completely ceased publication in January 2018. This development also affected **ArcInfo** published by ESH Médias (previously Hersant) in Arc Jurassien. In late January 2018, two traditional regional daily newspapers, L'Express and L'Impartial, were dissolved and united under this common brand. Previously, arcinfo.ch was the shared online service offered by the two newspaper brands.

In the small country of Switzerland, the power to form opinions is concentrated within a few **media corporations**, and in many areas is made up of a "**duopoly**" with SRG SSR and Tamedia. Both of the largest companies, which are the only outlets with their own offers in all spaces investigated, hold together for slightly more than half of the national opinion-forming power in 2018. **SRG SSR**'s market share is a high **35 percent,** gaining 4 percent compared to the previous year, and is the frontrunner in all 18 investigated markets. **Tamedia** claims **16 percent** of the Swiss opinion market (-1% since 2017). The leading private media provider is therefore not just the clear runner-up on a national level, but is also in the same position in the German- and French-speaking regions of Switzerland. All other investigated media companies have a significantly lower impact: The **NZZ-Mediengruppe** and **AZ Medien** are in positions 3 and 4 (with a share of 6% and 5% respectively). With their regional media joint venture CH Media operating since 1 October 2018, the two company groups will certainly become number 3 in future. **Ringier** has suffered losses and is now only at five per cent (-2%). The regional groups Gruppo Corriere del Ticino, ESH Médias and Somedia together have further 3 percent of the national opinion-forming power. Furthermore, a large number of **additional media organisations**, to which almost 80 of the 170 investigated media brands belong, make up **30 percent of the national opinion-forming market** between them. As these organisations do not communicate with one voice, they contribute to the **diversity**.

Focus on the local edition systems and SRG SSR

The large **local edition systems** of private suppliers are still being watched attentively. This is because some brand combinations have achieved a strong opinion-forming power in media spaces when it comes to nationwide contents, and it is fairly close to the threshold value of 50 index points – in particular, the combinations BZ/Bund in the Bern media space, Luzerner Zeitung in Central Switzerland, St. Galler Tagblatt in St. Gallen and Südostschweiz in Grisons. An increasing **concentration of power** also unites **SRG SSR** with its brand portfolio, which once again emphasises the importance of the mandate under the terms of the licence respectively the requirement to provide balanced information. The concentration tendencies accentuated in 2018 will hardly be useful to Switzerland's media landscape and the role it plays in society should they continue for a number of years.

In future, *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**