Medienmonitor Schweiz 2017

Summary

Medienmonitor Schweiz examines 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 2017, the Swiss media sector ensured the balanced formation of opinions of the Swiss people that there was no acute danger arising from individual brands or corporations. The main channels of the Swiss Broadcasting Corporation (SRG SSR) and the strongest brands from Tamedia, in particular the trilingual commuter newspaper 20 Minuten, carry the most significant opinion-forming power. Something that is striking and of powerful importance in terms of media policy is the distinct ageing of the TV audience and the continuing trend for coordinated editorial content.

Methodological information

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

1) Representative sample online surveys and personal offline surveys about the importance of 170 Swiss media brands when it comes to forming individual opinions (N=5,001)

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**. It is a valuable feature of democracies that is worth protecting. 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 has proven to be a success over the decades and is generally broadly accepted by the Swiss population, as the negative result from the vote on the "No Billag-Initiative" (vote on the abolition of radio and television fees) recently confirmed. 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 **170 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.

The Swiss media landscape guarantees a diversity of opinions

The survey for 2017 shows 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 unpleasant and 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, 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, 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 almost 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 – not even the free commuter newspaper **20 Minuten,** which is the only daily brand to reach a large multi-lingual audience and is the clear **Swiss leader** when it comes to forming opinions.

In **all regions of Switzerland**, the **SRG SSR** is by far in the strongest position. Both of the main channels occupy the top spot (TV) and third place (radio) in the three regional language opinion-forming power rankings, followed closely by two or three other offers from the public broadcaster. **Private media providers** from Switzerland represent around half of the 20 offers which have the most opinion-forming power in all regions, but it is rare for them to rank among the top. Alongside the popular commuter newspaper 20 Minuten, which comes in at second place, in German-speaking Switzerland only the **Blick** and **Tages-Anzeiger** have an opinion-forming power of at least 10 index points. In Romandy, only 20 minutes (again in a strong position in second place), **Le Matin** (in 2017, the print edition of Le Matin was withdrawn from the market) and **24 heures** reach this level. The situation in the small region of Italian-speaking Switzerland is somewhat different, with six larger, private media outlets competing with RSI channels, in particular the **Corriere del Ticino** with the second strongest opinion-forming power.

The regional language opinion-forming power rankings are completed by a (small) handful of **foreign TV channels**, which can also exert considerable influence on opinion formation outside their core territory. They find themselves in a significantly better position than the private **Swiss regional television networks,** whose marginal position is not just apparent in terms of regional language media spaces, but also in local regional media spaces. Another striking point is the comparatively poor performance of **brands that are only present online** (due to a lack of official reach data, social media has no opinion-forming power). Even in this submarket, the SRG SSR shows a strong performance, with three out of six of their online services making the Top 20 in the regional language opinion-forming power rankings.

In the majority of the local regional **media spaces**, the SRG SSR has the most power, with the exception of three German-speaking areas, where 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 **contribute to the diversity** of opinions.

Corporate duopoly and regional heavyweights divide opinion-forming power

In fact, 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 the SRG SSR and Tamedia. However, it would be wrong to assume that a single provider from one of the 18 markets investigated could become dominant in the foreseeable future. Both of the largest companies, which are the only outlets with their own offers in all spaces investigated, hold almost half of the national opinion-forming power when they are combined. The **SRG SSR** represents an incredible **31 percent** and is the frontrunner in all 18 investigated markets. **Tamedia** claims 17 percent of the Swiss opinion market. 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, as well as in 8 out of 14 media spaces. All other investigated media companies have a significantly lower impact on the Swiss opinion-forming market: **Ringier** achieves seven percent, while the **NZZ-Mediengruppe** and **AZ Medien** are just behind, with four smaller corporations combining to make up three percent of the national opinion-forming power. Finishing behind the SRG SSR in second place is the NZZ-Mediengruppe which has significant **regional importance** in St. Gallen and Central Switzerland, and the same goes for the Gruppo Corriere del Ticino in Italian-speaking Switzerland, AZ Medien in Northwest Zurich and the Swiss Plateau, as well as Somedia in Grisons.

Furthermore, a large number of **additional media organisations**, to which almost 80 of the 170 investigated media brands belong (and none of the large corporations), make up a total of **30 percent of the national opinion-forming market** between them. Among them are numerous smaller Swiss media companies that produce mostly regional radio, print or TV brands; a few Swiss corporations whose core business is outside of the media sector, and some opinion-forming power heavyweights – mostly foreign TV broadcasters. As these organisations do not communicate with one voice, they contribute to the **diversity**.

The SRG SSR and local edition systems under observation

Despite the overall pleasing result, there is an indication of a certain vigilance which may be needed in the future when it comes to the free forming of opinions in Switzerland: On the one hand, the **SRG SSR** may reach a very **powerful position** in many markets thanks to the effective subsidising of the media with asymmetric license fee charges. This may reduce prospects for the regional competition, and it highlights the importance of the licensing obligation to ensure balanced media coverage. In addition, the distinct **ageing of the TV audience**, particularly when it comes to SRG SSR channels, is a big challenge for the currently broadcasting-centred subsidisation system with regards to ensuring a balanced forming of opinions in Switzerland in the future.

On the other hand, the ongoing trend for the **coordination** of editorial content and organisations may put certain media companies in a position, such as through the **local edition systems**, to exert significant opinion-forming power by publishing or broadcasting cross-regional content. For example, in 2017, the combined issues of the Luzerner Zeitung (Lucerne newspaper, a member of the NZZ-Mediengruppe) in the central Swiss media landscape exceeded the minimum 50 index point threshold value (with 51 points), and as such had a large influence in the regional opinion-forming market. And with the Südostschweiz daily newspaper (Somedia) in the media space of Grisons and the St. Galler Tagblatt daily newspaper (NZZ-Mediengruppe), two other local edition systems are following close behind (each with 49 points).

In the future, *Medienmonitor Schweiz* will observe the development of the media landscape and opinion formation in Switzerland every year. The **study website** visualises the core findings and documents market structures and current events: **www.medienmonitor-schweiz.ch**