

## Medienmonitor Schweiz 2019

### Summary

In 2019, *Medienmonitor Schweiz* examines for the third 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 2019, the Swiss media sector also ensured the conditions for a balanced formation of opinions of the Swiss people. However, on annual comparison, the media landscape is also characterised by increasing shifts in media consumption tendencies and the rise of social media as well as the SRG SSR's and TX Group's corporate duopoly.

#### 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 172 Swiss media brands when it comes to forming individual opinions (N=4,839)
- 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 attributed to media reporting.

Each year *Medienmonitor Schweiz* supplies a factual and systematic basis for the evaluation of the media landscape in Switzerland, and in particular the possibility of a free formation of opinions. The study 2019 collects information concerning the **opinion-forming power** of **172 media brands** and **9 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. With the 2019 study period, results are now available for the third time.

### **No imminent threat to the diversity of opinion**

Similarly to previous years, the current survey shows a diverse Swiss media landscape that still largely **fulfils** its societal function to **ensure a diversity of opinion** in spite of the difficult market conditions and shifts in the public's usage behaviour. 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 again give **no indication** that there is an **acute threat** to free opinion formation in Switzerland in 2019, whereby individual media brands or corporations would be in a position to unduly shape national, regional language or local regional opinion formation. Rather, it is the strongest media brands which are **under pressure** – in particular, in German- and Italian-speaking Switzerland. Compared to the previous year, some of them have been losing a great deal of influence on the public's formation of opinion, thus moving further away from the critical opinion-forming power threshold value of 50 index points (the maximum value is 100 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, across Switzerland the multi-language newspaper **20 Minuten** is the **number 1** opinion-forming power, in spite of a slight decline. In the **language regions**, the **SRG SSR** is still by far the strongest: 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. However, the public broadcaster's relative position is weakened by a slight drop, which affects most of its main brands.

On the other hand, the SRG SSR profits again from the continuous **strengthening of online** services – **srf.ch**, **rts.ch** and **rsi.ch** all belong to the year's rising stars of opinion forming. Add to this many traditional print brands, such as the **NZZ**, the **Tages-Anzeiger** or **Le Nouvelliste**, which for the most part have (only) the online channels to thank for their good performance.

Right now, Switzerland's **private media providers** only represent about 40 per cent of the offers with 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 leading providers. The free commuter newspaper has secured the top position in the German-speaking media spaces of Zürich/See, Basel, Bern and St. Gallen. In the other ten local regional media spaces, **the SRG SSR's first TV channels** are in the top position. Depending on the space, an additional two to five **regional media outlets** (mostly print or radio) hold a strong position in the distribution area, thus increasing the diversity of opinions. The **foreign TV channels** continue to lose ground.

### **Shifts in media consumption tendencies, social media and corporate duopoly**

Since 2018, the combined opinion-forming power of the media brands analysed has experienced a slight decline nationally and in all three language regions – more so in the country's German-speaking (-5%) and Italian-speaking (-4%) regions than in the French-speaking ones (-2%). This **shift** of opinion-forming power away from the traditional journalistic mass media can be explained, at least in part, by the **rise of social media** since the previous year. *Medienmonitor Schweiz 2019* has made a second projection for the opinion-forming power of social media, which enjoy a significant and increasingly important position in Switzerland's media landscape and continue to strengthen their influence on the public's opinion-forming process. Across Switzerland and in the German-speaking regions, social networks were still clearly the weakest media type in 2019 (at 13% and 11%, respectively). But in the **French- and Italian-speaking regions of Switzerland**, increased **vigilance** is warranted. Social media are experiencing a rise in these regions and claim as much as **19%** and **17%**, respectively, of the regional opinion-forming power, thus surpassing online outlets and, in Romandy, also print outlets. However, these numbers should be taken with a pinch of salt, as there is no official reach data about social media available.

A continuing shift of opinion-forming power away from Switzerland's media landscape – from journalistic mass media towards social or interpersonal communication channels and information sources that are increasingly moving away from traditional (political) processes and structures – would **hardly be conducive** to a sustainable establishment of the population's free, well-balanced opinion forming.

Luckily, the **market exits** that proved to be problematic as recently as 2018 (brands and print titles ceasing trading) did not continue during the current period. Notwithstanding the above, the opinion-forming power in the small country of Switzerland is still concentrated on the **duopoly of SRG SSR and TX Group** (previously Tamedia), which in 2019 accounts for exactly **half** of the national opinion-forming power, with advantages for the public broadcaster. Thus, compared to the previous years, the duopoly's influence has suffered minimum losses (-1%). Behind it, **CH Media** has become **the clear number 3** with its 9% of the Swiss opinion-forming market. The competition therefore proves even more challenging for the two market leaders, since as recently as 2018 the NZZ Media Group, which is now ranking third, only held 6% of the national opinion-forming power.

### **Focus on the local edition systems and SRG SSR**

The tendency to combine editorial staff (Tamedia's joint editorial teams, the SRG SSR's central newsdesks) or entire organisation networks (CH Media), which has been evident for some time, is – (at least) in the case of cross-regional information – connected to a **reduction of the content diversity**, which is less than desirable if one wants to ensure well-balanced opinion forming. This is why private companies' large **local edition systems** and brand combinations must still be closely monitored. Although even these systems have been affected by the general decline of opinion-forming power in 2019, to some extent they still enjoy significant opinion-forming power when it comes to cross-regional content in all media regions, which is relatively close to the power threshold value of 50 index points – especially the combinations of Luzerner Zeitung in Zentralschweiz and BZ/Bund in the media region of Bern. In its duopoly with TX Group, it is in particular the **SRG SSR** with its brand portfolio that enjoys an exposed **concentration of power**. This could result in undesired effects particularly when it comes to agenda setting, which once again emphasises the importance of the mandate under the terms of the licence and the requirement to provide balanced information. At the same time, it also seems important that the **TX Group** with its strong multi-lingual main brand 20 Minutes consistently follows the rules of professional conduct monitored by the Swiss press council.

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](http://www.medienmonitor-schweiz.ch)