Medienmonitor Schweiz 2024

Summary

For the eighth time, *Medienmonitor Schweiz* 2024 is examining the roles played by the media in forming opinions in Switzerland, while documenting the balances of power and business ties within the media market. Compared with the previous year, the media brands analysed were able to maintain their combined opinion-forming power. Also, the national shares of opinion-forming power per media type remain largely stable. With regard to the opinion-forming power of media corporations, the Bern media region once again exhibits the highest market concentration. However, the conditions for a balanced formation of opinion among the population are still met in all regions.

Methodological information

***Medienmonitor Schweiz 2024* 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.

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Each year, *Medienmonitor Schweiz* supplies a factual and systematic basis for the evaluation of current developments in the Swiss media landscape and, in particular, the free forming of opinions. The study 2024 collects information concerning the **opinion-forming power** of **181 media brands** and **ten media corporations** 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. Following one removal (Blick TV) and one new addition (baerntoday.ch), the media sample analysed comprises the same number of media brands as last year.

To determine **opinion-forming power**, media users evaluate the performance of the individual 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, as well as 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 2024 study period, results are now available for the **eighth 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 is stabilising after three years of decline

Following the steadily declining trend observed over the three study periods since the peak during the COVID-19 pandemic in 2020, the **combined opinion-forming power** of all media brands in 2024 has roughly stabilised at its pre-coronavirus pandemic (and 2023) level. In the local regions, a relatively large number of between 29 (Ticino) and 70 (Zurich/See) different brands are still accessible.

In terms of the **media brands with the most opinion-forming power and reach**, an inconsistent trend is evident in 2024, with the same rough amount of increase and decrease compared to the previous year. The declines particularly affect **radio brands**, such as Radio SRF 1, La 1ère and Radio SRF 3. The winners include **TV brands**, such as SRF zwei, SRF info or ARD, as well as **digital offerings**, such as srf.ch, watson and Instagram. The rapid rise of TikTok has halted. For the first time in a year-on-year comparison, the short video platform has had to accept a decline in opinion-forming potential. Furthermore, the developments during 2024 do not indicate that the gap between the opinion-forming power of the larger and smaller media brands has manifestly widened year-on-year.

Based on individual media brands, a calculation of the concentration mass using the Herfindahl-Hirschman Index (HHI) indicates a **low market concentration** in all 18 regions surveyed. Also, when compared with 2023, no significant increases in concentration trends were observed. Therefore, *Medienmonitor Schweiz* can also confirm in 2024 that **individual brands do not pose a threat** to diversity of opinion.

Brand systems with slightly accentuated trends in concentration

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 that far exceeds that of the individual brands through the consistent implementation of network potential. **SRG SSR**, with its German-language offerings (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 of **TX Group** and CH Media. In 2024, the German-language SRF system was able to slow the downward trend of recent years and gained slightly in opinion-forming power for the first time, and is almost two and a half times stronger/more powerful than the Meta system used in all language regions.

When calculating the Herfindahl-Hirschman Index (HHI) on the basis of these **brand systems** (and the remaining individual brands), all the brands analysed clearly remain below the 1,500-point limit and are therefore considered to be **less concentrated**. In 2024, the highest concentration value due to brand systems was in the **Bern** media region, with 1,369 points. Compared with the previous year, an increase in market concentration based on brand systems was observed in 11 of the 18 areas. In five media spaces, the concentration decreased.

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 half that of the market leader (14%). The combined influence of the two largest media companies is therefore exactly the same as in the previous year. **CH Media** follows behind with 11% of the national opinion-forming power, following a slight increase year-on-year. In fourth place in terms of national opinion-forming power is the US corporation **Meta** with 9%, followed by **Ringier** with 5%. The remaining corporations (NZZ-Mediengruppe, AZ Medien, Gruppo Corriere del Ticino, Somedia and ESH Médias) are again significantly behind.

Taken together, the ten0 largest corporations control 105 of the 181 brands in *Medienmonitor Schweiz 2024*; the remaining 76 brands have a variety of different owners. Similar to brand systems, media companies can also pose a potential threat to 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 10 largest companies converge in varying proportions. The HHI for the share of **media corporations'** opinion-forming power is clearly above the values for brand combinations or even individual brands in 2024. However, the absolute level of concentration rarely gives cause for concern, as the entirety of Switzerland, the two major language regions and, from a corporate perspective, 8 of the 14 regional media areas also show a low concentration. Overall, **six media regions** and the Italian language region surpass the 1,500-point threshold, and are therefore considered to be **moderately concentrated**, although usually only slightly. Also in 2024, the most pronounced market concentration is in the **Bern** media region (1,656 points). Compared with the previous year, the market concentration in 12 of the 18 regions analysed has at least slightly increased. In the more densely populated regions, there is a somewhat larger **concentration of power** among the two largest corporations (mainly SRG SSR and TX Group or CH Media), and the proportion of independent media brands is comparatively small, which increases market concentration.

The trend towards digital offerings continues

From a **type perspective**, **online** has grown slightly since 2023, after the media type suffered its first decline last year. This development is taking place at the expense of **radio**, whose share of opinion-forming power is declining slightly. TV, social media and print are stagnating year-on-year. The indications from last year that the **long-term trend** towards new, digital media has potentially slowed were not confirmed during the current study period. However, the year-on-year shifts are only small, and the situation regarding the national opinion-forming power of media types is largely stable. The **age-related challenges** for TV remain large, but have not worsened further. Also with social media, the steep and long-observed age-specific distribution of opinion-forming power in favour of young people has not noticeably decreased. In the youngest age group in French-speaking Switzerland, social media, for the first time, wielded more opinion-forming power than all other media types combined.

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 did not diminish in 2024. Overall, Medienmonitor also confirms the **functional capacity** of the Swiss media system for the free formation of opinion in 2024. The issue of brand concentration varies regionally and is somewhat more apparent in the Bern media region than in other areas.

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 and documents market structures and current events: **www.medienmonitor-schweiz.ch**