

# Switzerland - Media Landscape

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## Overview

Switzerland is a small, landlocked country in the heart of Western Europe whose key feature is its cultural diversity. Surrounded by Germany, Austria, Liechtenstein, Italy and France, there are as many as four different official languages:

German, spoken by 64 percent of the population, French (19 percent), Italian (8 percent) and Romance (<1 percent) - which define four different mentalities. The remaining 8 percent can be attributed to the languages spoken by immigrants. Foreigners account for some 22 percent of the population. The multilevel system of government (federal, regional and local) is the result of the country's socio-cultural and socio-political diversity. This structure, on the one hand, creates opportunities for political articulation also in the media but, on the other hand, it is also responsible for a variety of tensions among interest groups on these three levels.

The main features of the traditional and digital media in Switzerland are the persisting important role of the public broadcaster Swiss Broadcasting Corporation SRG SSR, recently challenged by private commercial publishers and broadcasters, an ongoing digitisation of the terrestrial TV and the convergence of Digital Audio Broadcasting (DAB), Internet Radio and Digital Video Broadcasting (DVB-T). This, along with the increasing online convergence leads to fierce competition for vanishing advertising money. A general shift is taking place from the traditional to the digital media (online and social media), which can be seen in the declining overall circulation of newspapers since 2003 and in the declining revenue for traditional media organisations, leading to layoffs and divestitures and an increasing concentration within the daily and weekly press market. One must also note the structural weakness in information-based journalism and an increasing significance of soft news.

The Swiss media market is small and highly fragmented, subdivided into a relatively large German-language media market, a smaller French-language market in the west as well as a very small Italian-language market in the south of the country. At the same time, media ownership in Switzerland is highly concentrated. There are two large providers, the PSB SRG SSR, present in all parts of the country with its TV and radio programmes (German-language SRF, French-language RTS, Italian-language RSI), and the Swiss publishing house Tamedia AG, present in all three main language regions with its nationwide free paper *20 Minuten*, *20 Minutes* and *20 Minuti* respectively.

The Federal Council has the legal right to issue licences to the public broadcaster SRG SSR and to provide it with funding from licence fee resources to produce radio (fully funded) and television (partially funded) programmes. Public service and the licence fee are, thus, inseparable. In return, SRG SSR is entrusted with a special mandate to provide all linguistic regions with programmes of equal quality on a public service basis. As much as 87 percent of the Swiss population listen to the radio and 65 percent watch TV on a daily basis, while 37 percent of the total advertising money goes to radio and TV. SRG SSR has to reflect the realities of Swiss life in all its facets, including politics, arts, society, economy, sports and entertainment. Its programmes are designed to help viewers and listeners find their ways in the complex realities of life in Switzerland. In particular, its programmes have to promote mutual understanding and exchange between the various parties, linguistic communities and cultures that exist in the country. Apart from the licence fee revenue, Swiss broadcasting is co-financed by advertising.

In 2015, SRG SSR received 1.196m Swiss Francs through licence fees, while advertising (only on TV - ads on national radio are prohibited) generated a revenue of 243m Swiss Francs. Sponsorship adds 55m Swiss Francs to the operating overall revenues of 1.607m Swiss Francs. Annually, a private user pays a licence fee of 165 Swiss Francs for radio reception and another 286 Swiss Francs for TV reception. Since the federal government has the final say as far as the actual amount of the licence fee is concerned, there is an element of dependency in the relationship between the SRG SSR and the state.

For the distribution of funds, there is a system of financial compensation in place, which transfers money from the largest linguistic region to the two smaller ones. The French and the Italian-language regions receive an over-proportional amount of the funding to enable them to produce and receive programmes that are of an equally high quality as in the German-speaking Switzerland. Although the licence-fee revenues from the German-speaking population add up to 70 percent of the licence-fee revenues in total, the programme producers in that region only receive around 46 percent of the total amount. Without cross-subsidies - as a sort of contribution to national solidarity - it would be nearly impossible to set up and maintain a full

television programme in all linguistic parts of Switzerland.

The newspaper sector continues to suffer from declining advertising and sales revenues, which are not even close to being compensated by gains made online. The willingness of consumers to pay for online news is low and the use of ad-blockers is widespread. Despite these problems, Tamedia AG achieved a record profit for 2015, and the NZZ media group also published sound figures. A significant part of Tamedia's growing profit, however, is due to activities that don't relate directly to news such as directory services and real estate listings. The turnovers of the five biggest publishing houses (2015) reads as follows: Tamedia AG (1064m Swiss Francs), Ringier (946m), NZZ-Gruppe (456m), AZ-Medien (243m) and Somedia (131m).

There are some digital innovations, invented by the leading publishing houses. Tamedia AG created a new division called Digital News & Development and the NZZ-Group has adopted a new management structure. Both the NZZ-Group and Ringier are participating in Facebook's Instant Articles initiative. Moreover, the NZZ-Group is working with the Blendle news platform and has launched digital news offerings for the Austrian market. Last year, Tamedia AG launched the 12-App, which makes the best articles from various media titles available via a new digital subscription.

The economic and political pressure on the Swiss Broadcasting Corporation SRG SSR increased last year, orchestrated by the same leading publishing houses like Tamedia, AZ-Medien, the NZZ-Group and Somedia. In addition, right-wing populist politicians have intensified political pressure and launched a popular initiative which aims to abolish the provision of public funds to the public news service altogether. The vote on this hotly debated issue will be presumably in the year 2018. In 2016, a federal government report backed up the SBC and described the future role of the public news service in a more or less status-quo manner.

In fact, the SBC seems to be in good shape. In total, SRG SSR employs 6,101 people, full or part-time, that means 5047 full time equivalents (FTE). 43 percent of whom are women (2015). The average annual salary across all categories of staff is 107,000 Swiss Francs for a full time role at an average age of 45. The lowest salary was 52,400 Swiss Francs and the highest 557,434 Swiss Francs (2015). Overall, the share of female employees has made it up to 43 percent for many years. When it comes to journalistic positions, the share has reached even 44 percent.) Some 65 percent of all journalists have graduated at a university. Concerning the cost of programme production in 2015, news and other information services accounted for 39 percent of SRG SSR expenditure or 626m Swiss Francs. Light entertainment and films took up 22 percent of the budget; arts, society and education 19 percent; sports 11 percent and music and youth programmes 7 percent (Facts and Figures 2015/16, p. 26).

The commercial pressure on the press has led to contradictory effects with regard to political parallelism. On the one hand, there is a clear "re-politicisation" of the opinion-shaping press. In contrast to the former partisan press, this tendency of re-politicisation of daily newspapers doesn't necessarily strengthen specific political parties. They rather follow certain political credos. For instance the NZZ Group, with all its newspapers, supports neoliberal policies and less the liberal party as such. The Ringier Group and Tamedia AG, with their tabloids and regional titles also favour bourgeois politics, albeit occasionally more progressive ones. For commercial and journalistic reasons however, the editors are not afraid to attack well-disposed politicians for the benefit of a good story. The Social Democrats and the Green Party which represent about 25 percent of the voters, do not have close relations to any commercial daily newspaper, while the most popular party, the National Conservative Swiss People's Party (SVP), can count on the support of the *Basler Zeitung* and the weekly magazine *Weltwoche*. Both strive for conservative and neoliberal basic values and are sceptical to state and friendly to economy. But it is also daily business in the journalistic field, that politicians grab journalists in order to get a juicy cover story. Overall, the opinion-forming press has also moved to the right in an opportunistic manner, parallel to the political climate in Switzerland.

When it comes to the development of the professionalisation of journalism, there are six dimensions of particular interest:

organisation, education, ethics, autonomy, common community orientation and public recognition. Nearly half of all media professionals are organised in a professional association or in a trade union, albeit with a declining trend. Almost 70% of the journalists have a university degree. They generally demonstrate a high commitment to professional standards of ethics. In a recent survey, almost all agreed that journalists should stand by the codes of professional ethics, regardless of situation and context. Similarly, three out of four journalists report a high degree of autonomy concerning their selection of stories (Dingerkus et al., 2016). On the other hand, the majority of journalists say that journalist's freedom has decreased as well as the credibility of journalism in the public. In short, the binding professional norms and rules have weakened and public-welfare-oriented motives have diminished, while the profit logic seems to dominate.

# Media

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## Print

Main features of the daily and weekly press are:

- Still a large number of regional titles, but no subscription national newspapers (due to four different languages)
- A regional newspaper market (owned by big publishing houses) that remains strong but highly depends on shrinking advertising income
- An increase in economic and journalistic concentration
- A free-of-charge daily press with a large share of readership (*20 Minuten* and *Blick am Abend*).
- A steadily shrinking newspaper readership over two decades
- The vanishing of quality and investigative journalism because of cost-savings measures

Media concentration forces single newspaper titles to sell, to merge or to shut down. More and more small and medium-size newspapers have been forced out of the market or have been taken over by large publishing companies. Therefore, all common forms of press concentration - publisher concentration (a declining number of publishing houses), journalistic concentration (a declining number of fully staffed papers), and a concentration of circulation can be observed in Switzerland. This tendency towards concentration also leads to increasing co-operation between publishing houses in logistics and printing. All daily newspapers in Switzerland featuring a circulation over 50,000 copies are owned by multimedia companies.

Tamedia has acquired many larger and smaller regional newspapers in the last decade such as *24heures* and the tabloid *Le Matin*. Tamedia AG reaches almost 40 percent of the press market share in the German-speaking region and over 60 percent in the French-speaking part. Tamedia AG publishes *Tages-Anzeiger* (140,196), the Sunday paper *SonntagsZeitung* (160,298), the *Berner Zeitung* (96,804), as well as *Der Bund* (39,948). Tamedia also publishes *20 Minuten* (442,994) in the German-and *20 minutes* (183,498) in the French-speaking part, a Monday-to-Friday daily for commuters, which is free of charge. The title *20 minuti* for the Italian-of Switzerland has a circulation of 31,929 copies. In addition, in 2010, Tamedia bought the three leading daily newspapers *24Heures* (55,279), *Le Matin* (40'682) and *Tribune de Genève* (36,393).

Other significant media players include the NZZ media group, with its flagship *Neue Zürcher Zeitung* (90,011), a nationally and internationally highly regarded daily newspaper, as well regional newspapers in eastern and central Switzerland, like *Neue Luzerner Zeitung* (114,109) and *St. Galler Tagblatt* (117,529). It also publishes the third Sunday newspaper in the greater region of Zurich, *NZZ am Sonntag* (103,714) as well as two regional Sunday Papers: *Zentralschweiz am Sonntag* (90'123) and *Ostschweiz am Sonntag* (48,307).

The multimedia group Ringier AG, one of the largest publishing companies, owns the daily tabloid *Blick* (circulation: 143,329), the free evening sheet *Blick am Abend* (270,984) and *Sonntagsblick* (172,551), the leading Sunday paper. Ringier also publishes the weekly magazine *Schweizer Illustrierte* (143,080) and the daily newspaper *Le Temps* (28,410) in the French-speaking region of Switzerland. Both Ringier and Tamedia are based in Zurich and are owned by one single family each. Thus, Tamedia went public 12 years ago offering 20 percent of their shares. The third-biggest multimedia Company is The AG für die Neue Zürcher Zeitung, also situated in Zurich.

## Radio

The SRG SSR structure reflects the fact that Switzerland is multilingual as well as multicultural: Production facilities are distributed all over the language regions. Six radio studios (Zurich, Berne, Basel, Geneva, Lausanne and Lugano) and four regional studios (Aarau, Chur, Lucerne, St. Gall) provide regional news.

SRF, the Radio and TV organisation for the German-speaking part operates six stations (Radio SRF 1, Radio SRF 2 Kultur, Radio SRF 3, Radio SRF 4 News, Radio SRF Musikkwelt and Radio SRF Virus). The overall programme output amounts to 54,472 hours (2015). RTS, the Radio and TV organisation for the French-speaking part, operates four radio stations: La Première, Espace 2, Couleur 3 and Option Musique. The overall programme output stands at 35,039 hours (2015). RSI, the radio and TV organisation for the Italian-operates three stations, namely Rete Uno, Rete Due and Rete Tre, totalling 26,280 hours of radio broadcasting programmes in 2015. RTR, the Radio and TV organisation for the Romansh-of Switzerland operates one station with a programme output of 8,760 hours annually (2015).

In the radio sector, national public radio competes heavily with regional commercial radio. Almost 60 percent of the market share goes to SRF radio stations, about 30 percent to regional commercial radio stations. Competition from abroad is rather insignificant with 5 percent.

The leading position of the public broadcast radio stations is obvious when looking at the market shares. In 2015, the German-speaking station Radio SRF with its focus on news, general information and Swiss and easy-listening music, claimed 31 percent of the market share. Radio SRF 2 Culture (classic music, culture) made three percent, Radio SRF DRS 3 (information and pop music) accounted for 17 percent. Radio SRF 4 News (exclusively news - no music at all), launched in November 2007, and Virus (for the young listeners) can be received via cable, Internet or satellite. They reach a market share of less than one percent. The market shares of the corresponding public radio stations of the French-speaking region read as follows: *La Première* 38 percent, *Espace 2*, 3 percent, *Couleur 3* 6.5 percent. Swiss commercial stations in this part of Switzerland received 24 percent and almost ten percent went to foreign stations. The data for the Italian-speaking part: Rete Uno 41,2 percent, Rete Due 4,9 percent and Rete Tre 17,4 percent. Finally, RTR got an audience share of 19.4 percent or an average of 10,000 listeners per day (2015).

The regional commercial radio stations with the biggest market share in the German-speaking part (2015) are: *Radio 24* (agglomeration of Zurich), *Radio Energy* (agglomeration of Zurich), *Argovia* (canton of Aargau), *Radio FM1* (canton of St. Gall), *Radio Pilatus* (central Switzerland). The market shares lie between 2.6 percent and 2.3 percent. In the French-speaking part the most successful stations reach a market share between 2.4 percent and 3.8 percent: *BNJ FM* (French-speaking part

of canton Berne: Jura Bernois), *Lausanne FM*, *Rouge FM* and *One FM*. In the Italian-speaking part *3i* and *Fiume Ticino* are the commercial radio stations with reasonable reach.

## Television

Three television studios of the public broadcaster SRG SSR in Geneva, Lugano and Zurich produce six independent programmes - two for each linguistic region - as well as a special programme in the Romansch language. In addition, *SF info* repeats the German-language news and information programmes. In detail, in 2015 (counting persons from the age of three over 24 hours) the programmes of public TV reached the following market shares (in their corresponding language region): German-speaking part: SRF 1 18.4 percent, SRF 2 10.1 percent, RTL 5.7 percent, ARD 5.1 percent, ZDF 4.8 percent, Sat 1 4.2 percent, Vox 3.3 percent and Pro Sieben 3 percent. In the French-speaking part the ranking reads as follows: TSR1 22 percent, TSR2 7 percent. And in the Italian-speaking part: RSI La1 20 percent, RSI La2 7 percent.

In the television sector, competition is limited to the SRG SSR and the foreign television channels. In each language region, private and public TV stations from neighbouring countries reach a considerable number of viewers. Swiss commercial TV stations only exist in the German-speaking part, namely *STAR TV*, *Schweiz 5* and *3+*. In addition, there are regional commercial TV broadcasters in all three language regions. These are in the German-speaking part *Schaffhauser Fernsehen*, *TeleBärn*, *TeleBasel*, *Tele Bilingue*, *Tele M1*, *TeleTell*, *Tele Ostschweiz*, *Tele Südostschweiz*, *TeleTop*, *TeleZüri* *Tele1* in the French-speaking part *Canal 9*, *Canal Alpha*, *Canal NV*, *la télé*, *maxtv*, *ICI télévision*, *TV Léman Bleu*, *TV Région Lausannoise* and in the Italian-speaking part *TeleTicino*. All of them have only a low number of viewers. Even worse, most of these stations have lost on audience in the past two years. Their market share accounts for less than 1 percent. Most of these private regional stations get splits of the licence fee to enable them to provide regional variety.

Compared with other countries, Switzerland has a low TV consumption, with an average of 118 minutes (German-speaking part) respective 135 minutes (French-speaking part) per day. About 30 percent of the market share went to the public TV broadcasters. TV channels from abroad accounted for 60 percent.

## Digital Media

The increase of Internet usage from 7 percent in 1997 to 91 percent in 2015 clearly demonstrates the main features of online media. The use of digital news platforms as an information source has grown rapidly. In addition, growing entrepreneurial convergence and commercialisation of the digital media business have led to an increase in the ownership concentration and a declining diversity of online news.

These investments in online news are made primarily by media companies that are already dominant in the print, radio and TV markets. At the expense of medium and small scale companies, the private commercial media companies and the public service provider SRG SSR are expanding their strong positions also in the online-news market. Looking at the broadest range of journalistic offers, the online-news formats of the most resource-rich publishing houses of Tamedia, Ringier, NZZ Group and SRG SSR are in front. Tamedia also controls about two thirds of the information offer in the online-news market in western Switzerland (Vogler 2016: 48). In the German-speaking part of Switzerland, SBC has a market share of 16 percent with its *Srf.ch* platform. The largest readership has the news site of the freesheet *20 minutes*, followed by *Blick.ch*, *Srf.ch*, *Bluewin.ch*, *Tagesanzeiger.ch* and *Nzz.ch*.

In addition, since 1999, the SBC has provided the news platform *Swissinfo.ch*. This online service has to fulfil the federal government's mandate to distribute information about Switzerland internationally, supplementing the online offerings of the radio and television stations of the SBC. Today, the international service is directed to an international audience interested in

Switzerland, as well as to Swiss citizens living abroad. The online service offers a Swiss view of topics and highlights, Swiss positions on international events and developments, while reflecting the view of Switzerland from abroad. *Swissinfo.ch* focuses on politics, business, culture, society and research and also provides specific information for the Swiss abroad to assist them in exercising their political rights in Switzerland. The service is available in 10 languages: English, German, French, Italian, Spanish, Portuguese, Russian, Chinese, Arabic and Japanese.

Especially the online news sites of the freesheet 20 minutes and the tabloid newspaper *Blick* enjoy growing popularity. However, user growth is stagnating for high-quality news platforms such as *Nzz.ch*, *Tagesanzeiger.ch* or *Letemps.ch*. The intensified cooperation within and between media companies and online-platforms homogenise the daily news output. According to Schranz et al (2017) the online offer of *Tagesanzeiger.ch* dominates all group-based and "paid" online-news platforms. The online content of the *Neue Luzerner Zeitung* and of the *St. Galler Tagblatt* are also highly influenced by the online news supply of the *Neue Zürcher Zeitung*.

Since a pronounced free-of-charge culture prevails in the online news business, the financial basis of information journalism as a whole is declining, which greatly increases the risks of an increase in "cheap journalism". Vogler (2016: 42) sees a concrete threat to the central functions of journalism. In any case, online-news platforms without a strong stand in the print business tend to stagnate or show an even declining use and reach. This is especially true for e-mail service providers who have daily news and information on their websites (eg *Gmx.ch*, *Bluewin.ch* and *Msn.ch*).

Also, journalistic independent news outlets in the online area, such as *Watson.ch*, *Infosperber.ch*, *Journal21.ch* or *Tageswoche.ch* are most likely to survive as niche products with a relatively small reach (Schranz et al 2017). Online newspapers or news websites like *Huffington Post*, *Buzzfeed* or *Vice* are not very popular in Switzerland (Reuters 2016).

In general, the advertising revenues remain relatively modest. In the online market, the major networks such as Facebook and Google, as well as online marketplaces and directories such as *Homegate.ch*, *Search.ch*, *Jobs.ch* and *Autoscout.ch* dominate (see Vogler 2016: 42). Even if publishing companies are involved in such undertakings the consequent commercialisation of the online news market leads to a thinning out of viable and relevant news journalism. The widespread hope that digitisation has a positive effect on the diversity of providers has not yet been confirmed. Only news platforms, which are made with high investments, such as *20minuten.ch* or *Blick.ch*, seem to be successful (see Vogler 2016: 45).

## Social Networks

Reuters Digital News Report and the latest report on the "quality of the media" (2016) show that 47 percent of the respondents say that they use social networks for information at least once a week. Especially young persons do so: 22 percent of young adults rely on social networks as their main source of information.

News sites, online portals and social media are already the main source of use for around two thirds (62 percent) of the respondents aged 18 to 24 years. For this generation, using TV as news source is rather insignificant with a proportion of 11 percent. Mobile media use is very popular in Switzerland: 81 percent of Swiss people use a smartphone and thereof 61 percent state that they also use it for news consumption. For 43 percent, their mobile phone is already their main device for using digital news.

The increasing relevance of social- and mobile-media use strengthens the power position of the American tech giants as intermediaries. Up to 36 percent of the respondents state that they use Facebook for news consumption (Fög 2016 Yearbook, p. 14). However, not all information media profit from social media to the same degree. The Facebook pages of SRG SSR and a few subscription papers, including *NZZ* and *24 heures* and the purely online player *Watson.ch* generate a relatively high level of attention. Also, the offerings from the free sheets and tabloid press dominate on Facebook. On the

other hand most providers -including private broadcasters, as well as most subscription papers- (still) only play a negligible role on social media.

## Opinion Makers

The numbers of online platforms outside the traditional media has increased in Switzerland in the past few years. Thus, the financing of new startups is still largely unstable, no matter which business model they ave put into place. In many cases, experienced professional journalists are at work with the mission to counteract the journalistic deficits of the traditional media and to fill a niche. The boundaries between investigative journalism, alternative political journalism, civic or citizen journalism, content marketing, public relations and public affairs are fluid but in most cases still a valuable alternative to the traditional media offerings. The following list in alphabetical order gives an impression of the status and viability of such new startup platforms: Barfi.ch, Coup-magazin.ch, Influence.ch, Journal B, Politcast-uri.ch, Onlinereports.ch, Project R, Tsri.ch, Zentralplus and much more.

## Sources

### Newspapers

- [20minuten](#)
- [24heures](#)
- [Aargauer Zeitung](#)
- [Basler Zeitung](#)
- [Berner Zeitung](#)
- [Blick](#)
- [Corriere del Ticino](#)
- [Die Südostschweiz](#)
- [La Regione Ticino](#)
- [Le Courier](#)
- [Le Matin](#)
- [Le Nouvelliste](#)
- [Le Temps](#)
- [Neue Luzerner Zeitung](#)
- [NZZ](#)
- [Sonntags Zeitung](#)
- [St. Galler Tagblatt](#)
- [Tages Anzeiger](#)
- [Tribune de Genève](#)

### Publishers

- [NZZ Verlag](#)
- [Ringier](#)
- [Tamedia](#)

### Radio

- [Radio24](#)



- [Radio Suisse Romande](#) (RTS)

## TV

- [Radiotelevisione Svizzera](#) (Public Broadcasting Organisation, in Italian)
- [Swiss Broadcasting Corporation](#) (SRG SSR)
- [Swiss Television](#) (SRF)
- [Télévision Suisse Romande](#) (public TV network with 2 channels: TSR1 and TSR2)

## Digital media

- [20min.ch](#)
- [Blick.ch](#)
- [Bluewin.ch](#)
- [Nzz.ch](#)
- [Srf.ch](#)
- [Swissinfo.ch](#)
- [Watson.ch](#)

# Organisations

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## Trade Unions

The biggest union, Syndicom, counts 13,000 members from journalism, print, graphic industry, book trade and visual communication. With 3,500 members SSM (Schweizerisches Syndikat Medienschaffender) holds the interests for journalists working on TV and radio.

## Journalist Associations

The biggest professional association is Impressum with 4,688 members. Since 2006, the association lost over 1000 members. Not only Impressum but also Syndicom and SSM have difficulties to maintain their professional and political standing. Therefore, Impressum is working for more cooperation and collaboration within the professional associations and unions in media industry.

The ongoing crisis of the media industry also affects the publishers' association and other employers' associations of the media industry. The association Verband SCHWEIZER MEDIEN (VSM) has over 100 members with small and big publishing houses and media companies. VSM is a member of the Press Council, of the *Lauterkeitskommission* (for advertising), of ProLitteris as well as of the European newspaper publishers' association ENPA and the WAN (World Association of Newspapers and News Publishers). Together with its sister associations Médias Suisses and Stampa Svizzera, the VSM is committed to safeguarding the interests of the commercial media companies against the authorities and the public broadcaster, whose dominant market position is strongly disputed by all the big publishing houses except the publishing house Ringier. Last year, Ringier, SBC and the biggest telecommunication company Swisscom have founded the marketing company Admeira, which employs over 280 people at its locations in Zurich, Berne, Lausanne, Geneva and Lugano. It is the

largest marketing company in Switzerland and has a multimedial portfolio with advertising opportunities in around 80 media brands. In the eyes of this new big media marketing conglomerate, Admeira should be the Swiss answer to digital change and satisfy the new needs of the advertising industry. On the basis of the latest technology combined with data and marketing competence, Admeira will create new perspectives for innovative forms of advertising.

Beside the VSM, the commercial TV channels cooperate in Telesuisse (Verband der Schweizer Regional Fernsehen), while commercial radio stations are associated in the Association of Swiss Private Radios (Verband Schweizer Privatradios) for the German-speaking part and RRR (Radios Régionales Romandes for the French-speaking part respectively).

## News Agencies

Main features:

- Monopoly on information supply: one national agency Schweizerische Depeschentagetur (SDA/ATS)
- SDA providing information for all linguistic regions

Until January 2010 two main news agencies, SDA and Associated Press (AP) affiliate, provided information for the mass media. After the takeover of AP by SDA, the national agency SDA has now the monopoly on information supply. SDA, situated in Berne, is the only Swiss national agency that generates information in German, French and Italian. SDA is a publicly listed corporation owned by the Swiss publishers. It is a non-for-profit organisation and a classic news service, providing information about politics, economics, culture, social issues, sports and miscellaneous from domestic and abroad. The Swiss Press Agency SDA receives no subsidies from the government. The Federal Chancellery, however, uses the services of the SDA for the entire Federal Administration, paying over 1m Swiss Francs per language. Contrary to many other countries of similar size, the SDA gets no funds for distributing Swiss content abroad.

## Audience measurement organisations

Different organisations have been collecting data and information about the Swiss media landscape. Certified print runs and print coverage numbers are being collected by [WEMF](#) (AG für Werbemedienforschung) since 1964 by order of the communication industry. WEMF also collects data about cinema attendance and the Internet use.

Since 2006 Mediapulse provides statistics for TV and radio usage. The Mediapulse foundation for Media Research is an independent organisation that measures the reaches and ratings for all relevant radio and TV stations operating in Switzerland. There are around 150 radio stations and some 300 TV channels, which are measured 24 hours a day.

The mandate for this research is based upon the radio and television act (sections 78-81). Mediapulse is required to independently collect scientific data and to make it available to broadcasters, programme makers, the advertising industry and the research and public policy communities. The annual data is released twice a year. Mediapulse works under supervision of the Federal Department for the Environment, Transport, Energy and Communications (UVEK), which is also in charge of the election of the 19 members of the Foundation Board. The Administrative Board comprises eight members from SBC, private broadcasters and the advertising industry.

## Sources

Trade unions

- [Swiss Journalist's Union](#) (Syndicom)
- [Swiss Mass Media Union Union](#) (SSM)

Journalist associations

- [Employers'organisation for commercial media](#) (VSM)
- [Employers'organisation for commercial TV](#) (Telesuisse)
- [Employers'organisation for private radios](#) (VSP)
- [Swiss Journalists Association](#) (Impressum)

News agencies

- [Schweizerische Depeschenagentur](#) (SDA)

Audience measurement organisations

- [Mediapulse.ch](#)
- [Wemf.ch](#)

## Policies

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### Media legislation

Main features of media legislation and policies:

- Guaranteed freedom of the press and freedom of trade.
- Mandate of the Swiss Broadcasting Corporation to provide programmes reflecting and maintaining the linguistic and cultural diversity of the country.
- Mandate of the Swiss Broadcasting corporation to provide adequate supply of all regions.
- Four interest groups influencing, defining and enforcing the standards, norms and values of the Swiss media landscape.
- DETEC (Federal Department of the Environment, Transport, Energy and Communications) and OFCOM (Federal Office of Communication / Bakom) supervising the performance of Swiss radio and television broadcasting.
- Institutionalised programme-controlling and quality-ensuring authorities (UBI, Ombudsman).

Freedom of the press, radio and television is guaranteed by the Swiss Federal Constitution (art. 16). The institutionalisation and organisation of radio and television is based on article 93 of the new Swiss Federal Constitution. This article of the Constitution states that legislation is a federal government matter, not only on radio, and television, but also on online services (see Dumermuth 2016).

Article 93/4 also explicitly calls for the protection of the written press, which is completely commercialised. There is, however, no legal obligation for the Swiss press to fulfil a public service mandate. Private commercial media enterprises are only subject to free entrepreneurial decisions and, of course, the market. Opposite, the Swiss Broadcasting Corporation with its 17 radio and seven TV stations must contribute to free opinion-forming education, cultural development and entertaining. Public

media services have to take into consideration the country's particular characteristics and needs of the cantons. They have to present events factually and reflect the full diversity of views. In addition, the constitution (art 93/4) also guarantees independence from state influence. Finally, the constitution provides for an expert supervisory complaints board (UBI), which is independent of both, the authorities and the parliament (art 93/5). In short, with regard to the press, there is no regulation at all. With regard to broadcasting, the regulation is fairly complex and rigid.

The Radio and Television Act encompasses SBC's programming remit, defines how its services are to be distributed, how SCB is to be structured and how is to be financed. According to the law on the electronic media public service provider must:

- Contribute to the unrestricted formation of opinion, to the provision of general, wide-ranging and accurate information for listeners and viewers for their education and entertainment, and communicate knowledge on citizens' rights and obligations in the democratic decision-making processes.
- Take into account the diversity of the country and its inhabitants, reflect this diversity, and promote mutual understanding.
- Promote Swiss cultural creativity and stimulate listeners and viewers to participate in cultural life.
- Facilitate contact with Swiss nationals living abroad and promote the presence of Switzerland and understanding of its interests abroad.
- Focus on Swiss audio-visual productions, especially films, and broadcast as many European productions as possible.
- No preference of specific political parties, interests or ideologies.
- Providing the different parts of the country adequately with radio and television programmes.

The charter, issued by the federal council lays down in even greater detail the remit which SBC must fulfil across all its public media services (see Facts and Figures 2015/2016 SRG SSR, p 36/37)

With its radio services, the Swiss Broadcasting Corporation has to offer three stations in each of the German-, French- and Italian-language regions; one Romansch-language station; one youth service for German-speaking Switzerland; each of one music stations for classical music, jazz, and pop; one German-language news and current affairs station

With its television services, SBC has to offer two HDTV channels in each of the German-, French- and Italian-language regions; programming for the Romansch-language region; one German-language repeats channel; one service in French, providing continuously updated information and schedule notes via the Internet; first-run Internet programming covering political, economic, cultural and sports events relevant to the language regions or the nation as a whole.

SRG online services comprise online content relating to programmes (direct, real-time and thematic reference to editorial programmes or parts of programmes); online content not related to programmes in the form of text articles under the headings of news, sports and regional/local (limited to a maximum of 1,000 characters per article); background and context information about programmes; basic briefings in connection with educational programmes; audience forums and games connected with specific programmes; a multilingual international online service (Swissinfo); an online service for the Italian-speaking audience living close to the Swiss border (Tvsvizzera.it).

Even in the age of the Internet and digitisation, Switzerland remains committed to an independent and comprehensive public service in the media sector. To continue to face the challenge of digitisation, the framework conditions for licensed radio and television broadcasters at the national and regional level must be adapted. In a recently published report, the Federal Council came to the conclusion that for direct democracy in Switzerland, the existing model with the Swiss Broadcasting Corporation (SBC or SRG SSR) as a major provider anchored in all linguistic regions has proved itself. It guarantees a high-quality public service. The Federal Council evaluates this model to be most suitable for the future. However, the demands on the SRG SSR must be made more stringent - though with the same budget. Furthermore, the SRG SSR ought to make efforts to better

address the requests and needs of young people who turn away from “traditional” media to use the Internet.

The Council of State’s Transport and Telecommunications Committees (TTC) commissioned the Federal Council to examine the SRG SSR’s public service offerings including the private-sector broadcasters. The report depicts a media landscape which is undergoing profound changes. Digitisation has changed media usage habits, and media offerings have multiplied. The younger generations in particular are more and more turning away from the classic or traditional media. Young people use public service programming lesser than older people. For example, SRF television reaches only 20 percent of people under 24, but 70 percent of the over-60s. However, the Federal Council defended more or less the status quo in its conclusions:

- It is essential that Switzerland continues to have an independent and comprehensive public service funded by a solid system of fees in the future.
- Switzerland’s federalist, multilingual structure needs an audio-visual landscape, which takes all population groups into account.
- The SBC is a key factor for the integration of all social groupings (language communities, people with sensory disabilities, different generations, people with a migration background) and for the functioning of direct democracy.
- The existing public service model has worked satisfactorily and meets the requirements. Thus, it must be adapted to the digital environment.
- For the legitimation of the public service, it is important that in the future the SBC must clearly differ from the commercial suppliers.
- The mixed financing (licence fee and advertising) of SBC service public has proven itself.
- The current financial resources of the SBC are sufficient to ensure the public service.
- The SBC’s existing advertising restrictions, in particular the online advertising ban, should be maintained.
- The licensed regional programme providers as well as the SRG should cooperate more closely with commercial media companies in the future.

The Federal Council has also taken position to the proposal of abolishing the licence fees to fund the SBC. The government rejects the popular initiative launched by members of the right-wing Swiss People’s Party and the Centre-right Radical Party. They claim that the SBC abuses its dominant market position. The Communication Ministry warned that the SBC could no longer fulfil their mandate and small languages minorities in particular would be hardest hit if licence fees were abolished.

To get a more in-depth view on the mass media regulation, law, subsidies, etc, the website of the Federal Office for Communication presents adequate information. The annual report of SRG SSR offers further information on structures and future reforms of the public broadcast landscape. The professional association Impressum publishes the magazine [EDITO](#) bimonthly. Another source is the trade journal *Werbewoche*. When it comes to daily newspapers, the *Neue Zürcher Zeitung* still has a sort of media section that provides its readers with different topics connected to media and media technologies once a week. [Medienwoche.ch](#) is also a viable source for researchers and journalists.

## **Accountability systems**

In June 2011, the Swiss Federal Council published a report entitled “Protection of the pluralisms of the press” and stated that the Swiss publishers have to take the lead in keeping pace with the ongoing transformation of the media industry. Three years later, the federal government reiterated that the accountability, the responsibility and the ability of self-regulation by the corporate media have to be the primary answer to media system in disruption. Strange enough, the government was not willing to take action, although the findings of several different research undertakings demonstrated a wide range of structural deficits, especially in the newspaper industry.

Between 1968 and 2013, the number of subscribed daily and weeklies shrank from 410 to 210 units. On the other hand, the number of free sheets has risen. Out of 26 cantons, 21 only have one or even no newspapers within their territories. Only in the cantons of Zurich, Geneva, and Ticino, there are two politically and economical independent media organisations with a daily newspaper. Only one third of all households in Switzerland are subscribed to a daily newspaper. Advertisements accounted for around 70 percent of the revenues in the past century. This figure is currently down to 50 percent. The financial loss of the classic print media cannot be compensated by the growth of the online news media (Schranz et al 2017). The growing Native Advertising provokes collateral damage, which requires new self-regulation modes for digital and analogue journalism (Porlezza 2017). In the French-speaking part, the biggest publishing house Tamedia controls both print media as well as the online media market (Vogler 2016). The low level of availability and willingness to pay results in a down-spiral in online information media concerning the quality standards, which collide with the requirements of direct-democratic decision-making processes (Schranz et al 2017).

The newly established Federal Media Commission (FMEC), headed by Otfried Jarren, a communication and media researcher from the University of Zurich has been more active than the Federal Government. The extra-parliamentary FMEC is an independent commission of experts set up by the Federal Council. It advises the authorities with regard to the media, such as on the development of social communications, and contributes to sustainable solutions for shaping the future of the Swiss media system. The 15 members of the Commission are professional experts from various fields like publishing, radio and television associations, the broadcaster SRG SSR, media studies, education and training, new media, advertising, journalism and civil society. In addition to its advisory, monitoring and analysing function, the commission has also the right, to promote the public discourse and to address critical topics on its own initiative and discretion.

In 2014, the FMEC - in sharp contrast with the Federal Government - not only assessed the trends but also called for political action and recommended a number of supporting measures to the Federal Council. According to the FMEC, the Swiss media are caught up in an irreversible process of transformation. The changes are happening at a rate that many traditional organisations cannot cope with. In addition, a process of internationalisation is taking place in the media sector, which exacerbates the challenges for industry structures in the confined limits of Switzerland. In the interests of democracy it appears advisable for the FMEC that this process should be accompanied by supportive measures, because the current press subsidy arrangements do little to meet this need. To ensure a diverse and pluralistic media landscape, the FMEC therefore proposed various measures under certain conditions. In this process - according to the FMEC - the potential influence of the state should be kept as small and brief as possible, and thus prevent a situation which merely maintains the structures. In its report, the FMEC recommended two types of subsidy action. Both types differ in their timeline: short/medium-term (1) versus long-term (2):

- Type 1: Subsidies for basic press agency activities, for journalistic training and professional development, and for innovation projects through a programme of the Commission for Technology and Information (CTI).
- Type 2: Subsidies for journalistic startup businesses, for outstanding editorial or journalistic services and for media research.

Four months later, the reluctant Federal Council reacted to the propositions in a report - created in fulfilment of a motion by the Political Institutions Committee of the National Council. However, the Federal Council has been very cautious about the rapid introduction of new support measures. For the Federal Council, the structural changes are continuing in the media industry, the media concentration is increasing and advertising revenue is being diverted from traditional to online media. Further developments are currently not foreseeable and the outcome of the transformation is open. The Federal Council concluded that the various challenges - caused by the transformation - can best be tackled by the industry itself. Therefore, the Federal Council wants to give the industry time to cope with it on its own. The Federal Council shares the opinion that "the primary focus is on self-responsibility and the self-regulatory capacity of the media companies." Further, the Federal Council fears that the premature introduction of untested funding and subsidies approaches could lead to wrong incentives in the media market.

A newly released research by the Foundation of Technology Assessment proposes an "Infrastructure programme for journalism" (Puppis et al 2017) and made some recommendations for political action: Media policy should support journalism financially, safeguarding the conditions for independent media performance; politics, the media industry and the citizens have to ensure that (not only younger) citizens are media literate; media organisations and new intermediaries are required to safeguard transparency.

## **Regulatory authorities**

Since 1984 the Independent Authority for Programme Complaints (UBI) has evaluated complaints about programming. The Authority comprises nine part-time members appointed by the Federal Council, and a secretariat. It is not bound in its area of responsibility by any instructions from neither the Federal Assembly, the Federal Council nor the Federal Administration. The UBI submits an annual report on its activities to the Federal Council.

The committee judges individual programmes according to professional norms and social values. In practice, the procedure works as follows: Within twenty days of the initial transmission of a certain programme, anyone can lodge a complaint about a certain programme before the conciliation body of the broadcaster that has aired the programme (Ombudsman's Office).

The Ombudsman will then investigate the matter and try to mediate between the parties. If the person lodging the complaint is still not satisfied with the Ombudsman's findings, he or she can complain to the UBI. The complaint must be countersigned by at least twenty people. UBI's final decision can be challenged in the Federal Court. The UBI complaint procedure was originally designed to secure certain reporting standards. However, the number of complaints being filed through lawyers is growing and some proceedings thus take on a legal dimension.

The Ombudsman's Office and the UBI have to balance freedom of speech of producers and viewers, and the responsibility of electronic media to inform citizens in a reliable way. The institutionalisation of programme-controlling authorities is an interesting, but also problematic way to secure the quality of programmes and the interests of viewers.

The Independent Complaints Authority for Radio and Television (UBI) is an extra-parliamentary federal commission which rules on complaints against:

- Radio and television programmes provided by national, regional and local Swiss broadcasters.
- Other journalistic material published by the national broadcaster, SRG SSR, encompassing online content, Teletext bulletins, programme-related information, international news, information services and accompanying material for individual programmes
- Refused access to a radio or television programme (editorial content or publicity) of a Swiss broadcaster.

- Refused access to the editorial content of other journalistic services provided by SBC.

The UBI determines whether any violation of the relevant provisions of national and international law has been committed. This includes compliance with the requirements of appropriateness and diversity, observance of fundamental rights, protection of minorities and the prohibition of glorification or extenuation of violence. Appeals against decisions of the UBI may be lodged directly with the Federal Supreme Court. Before a complaint can be filed with the UBI, the proceedings must be brought before the office of the ombudsman who acts as arbitrator and mediator. The UBI is organised in a quasi-judicial fashion. The Authority's proceedings are normally held in public. In the past years, most complaints have been filed in the television sector, while the number of complaints against radio is almost negligible.

OFCOM Bakom and DETEC are in charge of supervising the performance of Swiss radio and television broadcasting. The Federal Office of Communications (OFCOM) is part of the Federal Department of the Environment, Transport, Energy and Communications (DETEC) and performs tasks both for the DETEC and for the Federal Communications Commission (ComCom). OFCOM's mandate derives from the Telecommunications Act (TCA), the Federal Act on Radio and Television (RTVA) and the Postal Services Act. The mission in relation to the media reads as follows:

- To guarantee the general conditions for strengthening a diverse media system which contributes to democratic opinion-forming and decision-making,
- To put into place the necessary conditions for ensuring a public identity-building service at the national, regional/linguistic and local levels in the area of the electronic media,
- To create a basis for sustainable support for the media.

Concerning the ethical standards within the media industry, the Press Council serves the public and the media as an appeal board. The Press Council looks into complaints brought to it or takes a stand itself on questions regarding the professional ethics of journalists. The area of responsibility of the Press Council covers editorial content or related questions of professional ethics in regard to all public media. Decisions of the Swiss Press Council are based on the "Declaration of the Duties and Rights of the Journalist". However, the Press Council cannot enforce its decisions and the media organisations have no obligation to publish it.

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Laws, regulations and institutions

- [Federal Department for Environment, Transport, Energy and Communication](#)
- [Federal Office for Telecommunications](#)
- [Federal Office of Culture](#)
- [Federal Statistical Office](#)
- [Independent Complaints Authority for Radio and Television](#)
- [Swiss Council of Press Guidelines](#)

## Education

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### Universities and schools



Different universities in Switzerland offer bachelor's as well as master's degrees in mass communication and media research. Thus, there are no specific programmes for vocational training at the universities with the exception of further education for communication professionals at the University of Zurich (eg communication in non-for-profit organisations, health communication, political communication in administration, science communication).

In the meantime, the universities of Applied Science have filled the gap. The *Zürcher Hochschule für Angewandte Wissenschaft* (ZHAW) offers a bachelor's programme in journalism and in organisational communication. The *MAZ - Die Schweizer Journalistenschule* offers extra-occupational training for journalists with the institution of a Diploma or a Master of Arts in Journalism. Another possibility to become a journalist is offered by the *Schule für Angewandte Linguistik* (SAL) or the *Medienschule Nordwestschweiz*.

## Professional development

The economic imperatives caused by the lower income of the traditional media are changing organisational and production structures rather quickly. In a survey commissioned by VSM, the media executives reported that the reduction in personnel costs was the most important corporate measure for the year 2016. According to Puppis, the majority of media workers believe that their jobs have become shakier (Puppis 2014). The case studies of Puppis and Hofstetter suggest that the professional culture is characterised by unprofessional practices and a sort of a dequalification of journalism. In an actual investigation, 47 percent of 909 journalists say that it is extremely or very important that they attract the largest audience possible and provide them with entertainment. It is not surprising that a majority of Swiss journalists see an increase for market related influences. Profit-making pressure, advertising considerations, audience involvement in the news production, public relations, and pressure toward sensational news as well as for audience research and audience feedback is their daily business (Dingerkus 2016).

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Media and Journalism studies

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- [MAZ](http://MAZ), Swiss School of Journalism, Luzern
- [Medienschule Nordwestschweiz](http://Medienschule Nordwestschweiz), Media School, Stein
- [School for Applied Linguistics](http://School for Applied Linguistics) (SAL), St. Gallen

## Conclusions

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### Conclusion

#### Main features and development trends

- Over the last 30 years, regional press monopolies have been established in almost all regions. In some regions the

media concentration has resulted in a monopoly situation.

- The nation-wide media landscape is dominated by very few commercial media companies and public service providers. The corporate concentration is especially problematic where the internal diversity and internal editorial media freedom is not organisationally underpinned.
- The declining advertising and readership leads to rounds of cost-cutting measures, which usually result in declining quality and a reduction in plurality. For the remaining media workers, the pressure on jobs grows and the working conditions for editors are deteriorating. Moreover, the average income of journalists and freelancers in Switzerland is stagnating or even declining. Tariff-based salaries for journalistic work are being undermined, while in German-speaking Switzerland and Tessin there are no collective agreements at all.
- In view of the digitisation and changing media usage habits, the Federal Council would like to develop the current Radio and Television Act into a law on electronic media, because a law which covers only radio and television is no longer keeping pace with developments.
- In 2018, voters are likely to have the final say concerning the proposed abolition of licence and household fees.
- The status and public service remit of the Swiss Broadcasting Corporation (SRG SSR) are challenged by the publishers of traditional media, neoliberal and right-wing political parties, as well as special interest groups. A fundamental discussion on the role of the public core media seems to be inevitable and pressing.

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