

Media concentration in Switzerland - First draft

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First draft

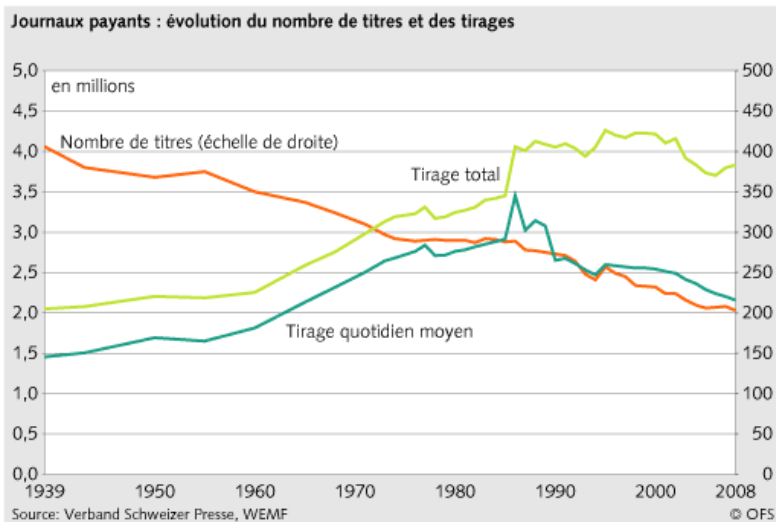
- Daily newspapers
- TV and radio
- Telecom

Swiss daily newspapers

General landscape

- Long tradition of local newspapers: media are considered as essential for democracy
- Readership at a high level
- Decline in the number of newspapers
- But for a long time: a growth in average circulation
- Change since 2000

General landscape of the Swiss daily newspapers



Recent trend

- Concentration in the paying daily press
- Development of the free press
- Joint daily newspapers

National Market Shares of Swiss daily Newspapers (%): circulation 2000 – 2008

	2000	2004	2008
20 Minuten	13,95	18,82	20,32
Blick	15,33	12,97	8,93
20 Minutes			8,55
Tages-Anzeiger	13,29	11,44	8,25
Blick am Abend			8,13
Berner Zeitung GES	10,16	11,25	8,21
Mittelland Zeitung GES	9,87	9,37	7,82
Neue Zürcher Zeitung	8,41	7,47	5,52
Neue Luzerner Zeitung GES	6,62	6,54	4,98
Südostschweiz GES	6,88	6,90	4,92
Zürcher Landzeitung GES			4,00
St.Galler Tagblatt GES	5,43	5,25	3,81
Basler Zeitung	5,67	4,88	3,40
24h	4,38	5,11	3,15
others			
Total Revenues (CHF mio)			
C4	52,73	54,48	46,05
HHI	1049,69	1091,35	959,97
Noam	316,49	329,06	256,56
sum of total market shares (others excluded)	100	100	100

**National Market Shares based on firms (%): circulation
2000 – 2008**

	2000	2004	2008
TAMEDIA	27,24	30,26	45,33
RINGIER	15,33	12,97	17,06
Espace Media (till 2006)	10,16	11,25	
AZ medien	9,87	9,37	7,82
NZZ AG	8,41	7,47	5,52
LZ medien	6,62	6,54	4,98
Die SüdostschweizMediengruppe	6,88	6,90	4,92
Zürich Land Medien AG			4,00
Tagblattmedien	5,43	5,25	3,81
Basler Zeitung medien	5,67	4,88	3,40
Edipresse	4,38	5,11	3,15
others			
Total Revenues (CHF mio)			
C4	62,60	63,85	75,73
HHI	1420,55	1521,86	2538,49
Noam	449,22	481,26	802,74
sum of total market shares (others excluded)	100	100	100

Swiss TV and radio

- « Public » TV and radio: SRG-SSR « Idée Suisse »
- with 3 languages and 6 channels
- But access to many European or international channels
- local private TV and radios are small

3 separate markets:

- Suisse romande (French)
- Deutsche Schweiz (German)
- Svizzera italiana (Italian)

Swiss TV**TV: SRG-SSR market share (%)**

	1988	1992	1996	2000	2004	2008
German	43	31	34,5	33,1	35,2	34,8
French	38	36	35	35	32	32
Italian	34	33	33,6	34	37,2	35,4

Swiss radio**Radio: SRG-SSR market share**

	2000	2004	2008
German	62,8	65,5	68,2
French	79,8	83	84
Italian	79,8	83	84

Swiss TV**French Switzerland (« Suisse romande »)**

	1984	1988	1992	1996	2000	2004	2008
C4		86	73	65	59	61	55
HHI		2222	1708	1403	1240	1242	1083
Noam		839,84	603,87	467,67	373,87	374,48	326,54

**Swiss TV****German Switzerland**

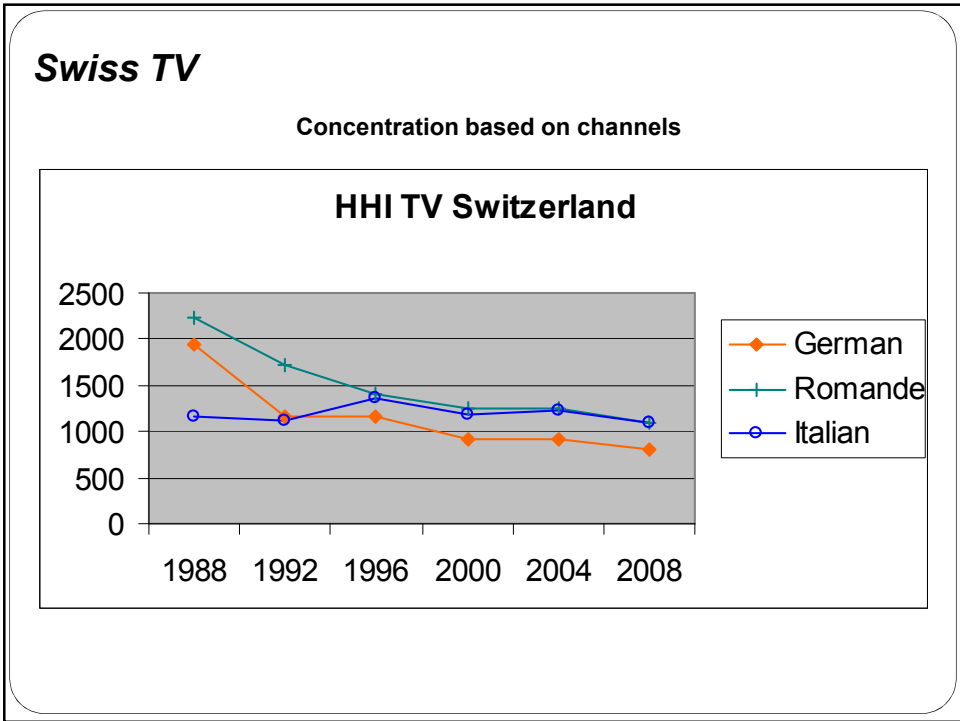
	1984	1988	1992	1996	2000	2004	2008
C4		74	58	53,8	46,6	47,8	45,6
HHI		1932	1157	1155,66	911,62	913,26	812,9
Noam		730,23	348,85	320,52	252,84	244,08	217,26



Swiss TV

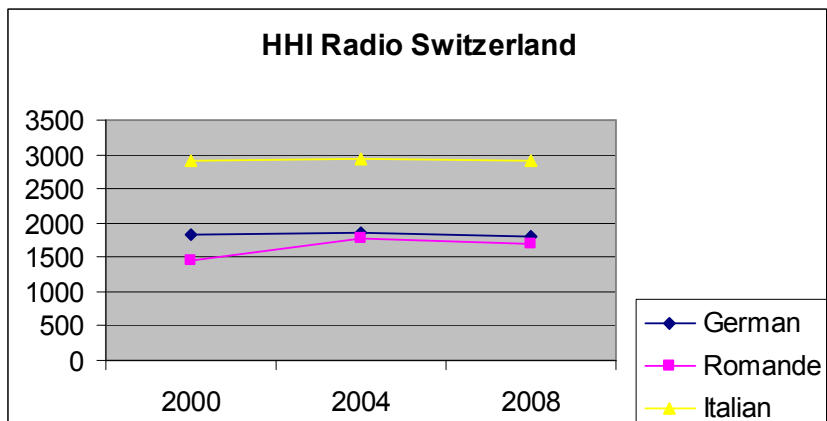
Italian Switzerland

	1984	1988	1992	1996	2000	2004	2008
C4		61	57	62,2	58,5	57,7	55,1
HHI		1154	1113	1360,64	1193,3	1218,81	1092,18
Noam		436,17	371,00	410,25	344,48	351,84	315,29



Swiss Radio

Concentration based on channels



First conclusions

- Ownership/Industry/Content
- Regional diversity: languages

- Concentration is not at a high level
- It is declining in television, quite stable in radio
- In newspapers: less newspapers and less firms, but still a high diversity. The future is uncertain for paying daily newspapers (advertising is declining)

Thank you