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Swiss newspaper market in flux

The print and electronic media are fighting over a scarce resource: public attention. The main protagonists here in Switzerland are the daily and weekly newspapers.

We review Switzerland's newspaper landscape. By Rolf Ribi

Switzerland's market for daily and weekly newspapers is in flux, as publications come and go and alliances are forged and broken. A few recent headlines illustrate the market's dynamic nature: Tamedia, a major Zurich-based publisher, took over another publishing house almost as large as itself: Berne-based Espace Media; the German Springer media group purchased the Jean Frey publishing house and broadened its reach here in Switzerland; Winterthur's regional newspaper, "Landbote", is cooperating with another regional paper, the "Thurgauer Zeitung"; news magazine "Facts"

and the business publication "Cash" have vanished from the market; more and more free newspapers are jostling to win a share of the commuter market; and more and more new Sunday papers are appearing.

These recent events in the print media sector are of political importance for the state: Article 16 of the Federal Constitution guarantees freedom of opinion and information. And Article 17 provides for freedom of the press, radio and television. Independent media are a cornerstone of democracy since they enable people to form their own opinions and

make decisions freely. But what if the press were in the hands of an ever-decreasing number of ever more powerful media groups (including foreign companies)?

No fewer than 400 different newspapers were being published in Switzerland before the Second World War. Even today, 205 non-free newspapers appear at least once a week: 145 in German-speaking Switzerland, 48 in the French-speaking part, 10 in the Italian-speaking region and two in the Rumantsch language. Yet over the same period, the total circulation of these publications has risen from nearly 2 million to 3.7 million. So the decline in the number of publications is offset by a rise in circulation and readers. Nevertheless, the total circulation volume of all the purchased newspapers has dropped since the turn of the century from 4.2 million to 3.7 million. Despite this, "Switzerland's press landscape is still extremely diverse compared to other countries", according to the "Neue Zürcher Zeitung".

The most popular dailies in German-speaking Switzerland are "20 Minuten" (a free newspaper), "Blick" and "Tages-Anzeiger", in French-speaking Switzerland they are "Le Matin", "24 Heures" and the "Tribune de Genève", in the Italian-speaking part "Corriere del Ticino", "La Regione Ticino" and "Giornale del Popolo". A ranking of the most popular dailies is shown in the box on the next page.

Four trends are shaping Switzerland's news publication market: a concentration on large publishing houses, the battle for the Sunday market, the increasing number of new free newspapers, and the growing importance of the Internet.

Saturated press market

Media experts agree that the Swiss press market is "mature and saturated" (according to publicist Karl Lüönd). A battle for supremacy is being waged, with spectacular takeovers. Two recent examples: the Zurich-based Tamedia group took over Berne's Espace Media group, making Tamedia the largest media company on the Swiss market, with sales of about CHF 1 billion. The Tamedia empire includes "Tages-Anzeiger", the free commuter newspaper "20 Minuten", the "Sonntags-Zeitung", the women's magazine "Annabelle", "Finanz und Wirtschaft", and now the "Berner Zeitung" and "Bund" as well as local radio and TV stations. Insiders expect to see editorial collaboration between the "Tages-Anzeiger"



The established dailies are feeling the pressure from new free newspapers, particularly commuter papers that target younger readers.

and the two Bernese dailies in the near future. The independence of the "Berner Zeitung" and the survival of the long-established "Bund" are at risk.

Last December saw a veritable coup, when the German Axel-Springer-Verlag media group acquired the Zurich-based Jean Frey media group, and with it the business magazine "Bilanz", the top-selling consumer advice paper "Beobachter" and the listings magazine "TV-Star". The Jean-Frey publishing house was latterly owned by a group of investors led by financier Tito Tettamanti, whose declared objective was to stop the "leftist" publishing houses of Tamedia and Ringier from acquiring the group's reputable "Weltwoche". Springer would have reluctantly acquired the "Weltwoche" as well, but the Swiss owners left the title in the hands of its new, right-wing editor-in-chief. Experts suggest that it's only a matter of time before Europe's fourth-largest media group takes over the "Weltwoche".

"Switzerland is a small country, but has a very interesting market," Springer CEO Mathias Döpfner said last year. The German media group, which publishes the "Bild" and "Die Welt" dailies, had already purchased the business paper "Handelszeitung", the stock exchange organ "Stock", and the "TV Digital" programme guide. Springer is now Switzerland's biggest publisher of business newspapers and magazines and paid-for programme guides. The industry is abuzz with rumours of a merger between the Springer group and Swiss publishing house Ringier. The French media group Hersant (which publishes "Le Figaro") is following a similar strategy in western Switzerland.

Newspapers are also experiencing a very different trend: regionalisation. Major media groups are buying up majority and minority holdings in smaller regional publishers. For instance, the "Neue Zürcher Zeitung" has shares in the "Zürcher Unterländer", "Zürcher Oberländer" and "Zürichsee-Zeitung". While the "Tages-Anzeiger" holds shares in the "Winterthurer Landboten" and "Thurgauer Zeitung". With five regional editions within cantonal borders, Tamedia is pursuing a highly aggressive campaign. Other regional cooperative ventures: The Mittelland newspaper group led by the "Aargauer Zeitung" provides the jacket section of the "Basellandschaftliche Zeitung", thereby gaining a foothold in Basel. And the "Winterthurer Landbote" and "Thurgauer Zeitung" merged to create "Die Nordostschweiz", with the "Winterthurer

Landbote" providing the jacket section. "Through this cooperation, both newspapers can further expand their leading position in north-eastern Switzerland and secure their publishing independence," declared "Landbote" Editor-in-Chief Colette Gradwohl.

Prominent victims

This summer, two prominent publications – the news magazine "Facts" and the business paper "Cash" – fell victim to the print media's jockeying for position on the Swiss market. Both were regarded as the last groundbreaking publications in Switzerland's media landscape. After twelve years and losses of more than CHF 100 million, Tamedia discontinued the weekly magazine in June. The omens were never good for "Facts". Initially it was a marketing ploy to attract colour ads. Its design was continually being changed, and editors-in-chief came and went in rapid succession. There were plenty of headlines such as "Women cash in as men pay", but no big scoops. Worse still, when the paper linked a centre-right Federal Councillor to Berne's red-light district, the editor-in-chief was forced to make a public apology.

Shortly before the (expected) end of "Facts", the business publication "Cash" came to an (unexpected) end. Against the backdrop of an economic boom, the Ringier publishing house decided to shelve Switzerland's biggest-selling business newspaper "following losses in the tens of millions". Shortly after its launch

18 years ago, "Cash" boasted a circulation of 70,000 and was a highly profitable publication. But sales began to decline and the weekly paper slipped into the red. According to former Editor-in-Chief Markus Gisler, the main idea behind "Cash" was to provide "critical support for business" – a daring concept (the banks, for instance, boycotted the publishing house).

Publishers' brawl over free newspapers

The talk in Switzerland is of a "freesheet war". These free commuter newspapers attract no less than CHF 120 million in advertising revenue. Thirty percent of the population reads free papers, primarily younger people and those with fewer academic qualifications. Leading the market for free dailies is "20 Minuten", a morning paper majority-owned by the Tamedia publishing house and with a circulation of 420,000. It is a veritable cash cow, generating turnover of CHF 100 million and profits of CHF 40 million. Small wonder then that other competitors are being lured by such attractive margins: Ringier, with its evening paper "Heute" and the slimline free business daily "Cash", which have so far proved financial failures. In French-speaking Switzerland, Tamedia's "20 Minutes" competes with the Edipresse group's "Le Matin Bleu".

This autumn, however, a veritable "publishers' brawl" is set to break out. The free publication ".ch", with a circulation of 425,000, is aiming to be the first out in the early hours of

THE TOP-SELLING DAILY, WEEKLY AND SUNDAY PAPERS AND MAGAZINES IN 2006

Rank	Title	Copies sold	+/- 2005%	Website www.
1	Sonntags-Blick	272 425	-2.8	blick.ch/sonntagsblick
2	Blick	254 657	-2.9	blick.ch
3	Tages-Anzeiger	225 287	-2.6	tagesanzeiger.ch
4	Berner Zeitung	215 707	-5.1	espace.ch
5	Le Matin Dimanche	215 024	-1.1	lematin.ch
6	Mittelland-Zeitung	210 274	+11.0	mittellandzeitung.ch
7	Sonntags-Zeitung	201 358	-0.6	sonntagszeitung.ch
8	Neue Zürcher Zeitung	146 729	-2.8	nzz.ch
9	Die Südostschweiz	139 802	+0.2	suedostschweiz.ch
10	Neue Luzerner Zeitung	131 004	-0.9	neue-lz.ch
11	NZZ am Sonntag	121 204	+4.8	nzz.ch
12	Zürcher Landzeitung	109 931	-2.2	zuercherlandzeitung.ch
13	St. Galler Tagblatt	103 077	-2.9	tagblatt.ch
14	Basler Zeitung	98 645	-0.0	baz.ch
15	24 Heures	95 315	-7.7	24heures.ch
16	Die Weltwoche	82 849	+3.0	weltwoche.ch
17	Le Matin	76 194	-0.3	lematin.ch
18	Tribune de Genève	67 151	-5.5	tdg.ch
19	Le Temps	45 970	-2.1	letemps.ch
20	L'Hebdo	44 870	+2.2	hebdo.ch

the morning ("before seven"), with dispensers at the entrance to buildings and home delivery. Tamedia is planning to respond with a new free newspaper, a shorter version of the "Tages-Anzeiger", or by increasing the print run of "20 Minuten".

The invasion of free newspapers is causing unrest in the press industry. "Conventional dailies, formerly the backbone of direct democracy, are coming under more and more pressure," wrote the "Neue Zürcher Zeitung". "Sooner or later", it said, "someone will fall victim to the tougher competition". The "Tages-Anzeiger" expresses similar misgivings: "Regional newspapers will feel the effect of a new free newspaper on their advertising revenues. The competition is getting tougher." Even the "kiss of death" is predicted: "Free newspapers are destroying the traditional dailies. Then the battle between free newspapers will kill off this new business, too," suggests media columnist Kurt W. Zimmermann.

Skirmishes on the Sabbath

Swiss publishers discovered the market for Sunday papers early on, spearheaded by the "Sonntags-Blick", founded back in 1969. In the Eighties, the newly founded "Sonntags-Blatt", a Sunday version of various regional papers, disappeared when the Tamedia publishing house launched its Sunday paper in 1987. Within ten years, the paper was a gold mine. Five years ago, the "NZZ am Sonntag" was launched on the market. "Südostschweiz", a daily newspaper already issues a seventh edition on Sundays, and in September the "Mittelland Zeitung" will follow suit. And the "Basler Zeitung" plans to publish a weekend supplement on Saturdays. Everyone wants to profit from the millions in advertising revenue that are flowing into the coffers of the Sunday press. In the Ticino, the free Sunday papers "Il Caffè" and "Il Mattino della Domenica" have proved a hit.

What makes Sunday papers so interesting for readers and advertisers? Apart from sports events, party conferences and road accidents, there is usually little news made on a Satur-

day. And breaking news is the preserve of the fast digital media. Sunday newspapers therefore rely on eye-catching front-page stories for sales. This also satisfies "the need for explanation, background, context and detail, as well as for service, entertainment and affinity", according to publicist Karl Lüönd. For editors and advertisers it is interesting to know that Sunday newspapers have double the useful life of weekday papers.

The future of the daily paper

Can the traditional paid-for daily paper survive in the age of the Internet and digital media channels? The question is highly relevant in terms of national policy: direct democracy relies on active co-determination by emancipated, informed citizens. It is the press that guarantees the free exchange of information and opinions. While audiovisual media are fast and attractive, they provide less detailed, more ephemeral information.

"Who killed the newspaper?", asked the London "Economist" on its front page. And indeed, the Internet revolution is changing the media world. More and more people are reading and advertising online. A glance across the "pond" shows the extent of the change: in the United States, the number of paid-for papers has declined by a third over the past twenty years. "We have largely written off newspapers here in the US," announced "Vanity Fair" two years ago.

In Switzerland, too, media experts are predicting the end of the printed newspaper. "Paid-for information on paper is an outdated model," says media expert Kurt W. Zimmermann, citing the decline in the readership of virtually all major daily newspapers and the boom in free newspapers. "Newspapers will soon appear only in electronic form rather than in print," declares Hanspeter Lebrument, the president of the Swiss Press Association. He thinks that the young mobile phone-oriented generation will soon stop buying newspapers altogether. Even Hugo Bütler, the former editor-in-chief of the "Neue Zürcher Zeitung", recently said,

"Whether the "NZZ" editorial team's work will still be in the form of a printed newspaper in thirty years' time is a question that will ultimately be decided by our readers".

Yet other members of the industry beg to differ. "I don't share the newspaper industry's general mood of doom and gloom," says Swiss-American dual citizen Marcus Brauchli, the editor-in-chief of the highly respected "Wall Street Journal". However, only papers "that rely on their own stories, comments and analyses" will survive. The leading US business publication is planning to extend its online issue without undermining its print edition. Peter Hartmeier, editor-in-chief of the "Tages-Anzeiger", looks at it this way: "The trusted name of a quality newspaper and its close ties with readers offer potential for the future." And that goes for printed and online newspapers alike.

"It all goes to show that newspaper publishing remains a booming and profitable business, and that news will continue to be disseminated on paper for a long time to come," wrote the German weekly "Die Zeit". While newspapers are no match for television and the Internet in terms of speed, they can hold their own "in terms of in-depth reporting and informed research: in short, through excellence." Nevertheless, "Nothing will be achieved without journalistic credibility and the will to invest in editorial quality."

The most widely-read news magazine in Europe shows where the newspaper of the future is heading: four million people read Germany's weekly magazine "Spiegel", and two million users visit the virtual Internet daily "Spiegel-Online". According to Editor-in-Chief Stefan Aust, "There is a huge demand among the general public for experienced journalists who can read, review and prepare information and explain the contexts." Swiss publishers and editors should pay heed to the words of "Spiegel's" editor-in-chief: "People are not in the least bit tired of buying newspapers and magazines."

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