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Media challenges and strategies in Romandie and Ticino☆

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ABSTRACT

This study concerns the changes experienced by the media companies in French-speaking Switzerland (Romandie) and in Italian-speaking Switzerland (Ticino). Based on a series of interviews with managers and editors, this study updates the challenges (technological, economical and journalistic) they are facing and the strategies they are actually implementing to overcome difficulties (decreasing advertising revenues, proliferation of news service providers, etc.). The results show that companies opt for strategies according to their identity and to the level of competition they face. Large groups spread their activities on the internet and bank on mobile readers; small companies bet on the exchanges and on the loyalty of their readers.

1. Introduction

Scientific literature on the media crisis considers that newspapers have reached a turning point. Certain studies feel that a number of papers could disappear if they fail to alter their economic models, deploy an effective digital strategy, boost the quality of their content or obtain an increase in state aid (Cagé, 2015). Other studies suggest that newspapers will not disappear with the boom in new media, but that the print version of a newspaper could soon become a supplement to the digital edition (Anderson, Bell, & Shirky, 2012). But what exactly is the press situation in Switzerland? To answer this question, our paper proposes a comparative analysis of several media companies in Romandie and in Ticino.[1] The media sector has evolved since the beginning of our survey. The results presented here should be read as a photography of the situation in 2013.

2. Decreasing advertising revenues and proliferation of news service providers

In the autumn of 2008, the global economy entered into a recession in the wake of the subprime crisis that had struck the USA several months earlier. The advertising market was affected by the economic slow-down and declined in both the USA and Europe. The press sector was badly hit by the drop in advertising budgets. Daily newspaper revenues are generated by a combination of readership sales and advertising. With the exception of specialist reviews, publications can rarely do without advertising (Le Floch & Sonnac, 2005). In the paying daily news press, revenues from advertising and classified advertisements accounted on average for 40% of pre-recession income in France (compared to 60% for sales), 64% in Spain and Germany, and over 70% in the USA (Toussaint-Desmoulin, 2011). The drop in these revenues, varying from one paper to the next, had a significant impact on newspaper finances. Most groups therefore implemented cost-cutting plans, laid off staff and even sold off some of their divisions. In Switzerland, the economic decline also had repercussions on the advertising market. Total advertising revenues for all media was down 3.3% in 2008 and 20.4% in 2009, although it increased by 4.5% in 2010. This recovery failed to be sustained in the following years: +0.2% in 2011, −11.0% in 2012 and −9.4% in 2013 (Fondation Statistique Suisse en Publicité, 2014).

The press migration from print to digital has happened in several stages. The first was the digitization of professional newsletters, grey literature usually distributed via subscription to a targeted public of businesses or individuals. The information they contain covers economic, international and legal news as well as changes

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[1] The survey was carried out as part of the Sinergia research, *Crisis and transformation of the core media sector in Switzerland*, funded by SNF. See Meier et al. (2012, 2013). The author of the survey focused on the French- and Italian-speaking regions of Switzerland. For an analysis of the German-speaking Switzerland, see Sele (2013).

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in company or government heads, and so on. Alongside this type of product, similar to old-style sales newsletters, are news pages that offer a selection of articles published in the press together with reports and tabloid revelations. The arrival of the written press online constitutes the most important phenomenon in digital migration. A first wave of North American newspapers launched their websites in 1994: *Newsweek*, *Time*, *The Wall Street Journal*, etc. The following wave, in the early 2000s, included almost all written press publications, as well as newspapers published exclusively online, called *pure players*, radio stations and television channels (Huey, Nisenholtz, & Sagan, 2013). Separate, then merged with the original version, the development of digital products seems crucial to written press; and audio-visual companies. Online content is cheaper to create, which means more content can be produced and disseminated (Picard, 2011). Digitization also prolongs content lifespan and steps up interactivity with audiences – two potentially monetisable developments. Newspapers and magazines, radio stations and television channels had to take a new approach to their work (Christin, 2013). Delivering content at a set time and in only one format was no longer enough; they had to offer real-time news on their websites. In the internet context, this equates to providing a continuous stream of news (Stevens, 2006).

3. Corpus and method

Our corpus covers newspapers in French- and Italian-speaking Switzerland and two television channels. Although this analysis centres on written press companies, we wanted to know how two television channels are adapting to the context described above and in what way their responses are similar to or different from those adopted by the written press. The method is based on in-depth semi-directive interviews and was chosen as the best approach to establish the meaning and necessity behind these companies' actions. Fifteen interviews were carried out in summer 2013: nine managers[2] and eight editors (Table 1).

Table 1
Research corpus.

Publisher	Newspapers, magazines[a]	Interviews
Editions D + P	2	With the editor of the *Le Quotidien Jurassien* (47,000 readers[b]), the manager director having given his answers to the editor
Editions Suisses Holding	9	With the managing director and manager of *L'Express* (55,000), *L'Impartial* (35,000), *Le Nouvelliste* (111,000) and *La Côte* (19,000), and with the editor of the first two
Groupe St-Paul	3	With the manager director and editor of *La Liberté* (91,000)
Nouvelle association du Courrier	1	With the manager director and editor of *Le Courrier* (19,000)
Ringier	20	With the Ringier Romandie managing editor: *Illustré* (348,000), *L'Hebdo* (194,000), etc.
Tamedia	40	With the Tamedia Romandie managing editor: *20 Minutes* (565,000), *24Heures* (204,000), *Tribune de Genève* (125,000), etc.
Regiopress	1	With the manager director and editor of *La Regione Ticino* (90,000)
Società Editrice del Corriere del Ticino	2	With the manager director and editor of *Corriere del Ticino* (127,000)
RTS	–	With the head of news (19:30, 370,000 viewers[c])
RSI	–	With the head of news (20:00, 52,600 viewers[d])

[a] Only in Switzerland. *Source*: Edito + Klartext, 03|2013, pp. 24–25.
[b] *Source*: Remp, Mach 3 (2) study, 2013.
[c] *Source*: RTS.
[d] *Source*: RSI.

4. Media company challenges

4.1. Technological challenges

The technological challenges most cited by our respondents were the integration of the internet and new media, and implementation of a paywall formula. Media companies are very aware of the success of new devices and community websites along with the resulting news consumption practices. Managements pay very close attention to their website traffic and changes in the number of subscriptions to the digital version. They see digital and mobility as a challenge they have already adapted to, or are in the process of adapting to, as their resources allow. The newspapers with the greatest financial resources, owned by Tamedia and Ringier (Switzerland's number one and two media groups respectively in terms of turnover after the Swiss Broadcasting Corporation, SRG SSR[3]) have been focusing on their websites, classified advertising sites and services over the last decade. More recently, this focus has included social media and mobile applications. And they have continued to work on their print versions. These newspapers (*Le Matin*, *Tribune de Genève*, *24 Heures*, etc.) have developed a responsive and diversified digital offering which allows them to reduce their dependency on national or regional news.

The other newspapers in our corpus also target the internet and social media. However, since they have less available resources than the two leading national publishers, they limit the content on offers on their websites (a few articles, comments and a PDF version of the paper). They focus mainly on agency dispatches and local news, seeing their website as a vehicle for immediate news (*Corriere del Ticino, Le Nouvelliste, l'Express/L'Impartial*), or at least as a showcase (*Le Courrier, Le Quotidien Jurassien*). The financial investments allocated to internet and social media products represent an obstacle for this second group of newspapers: '*we're not present on iPad, we have to decide if we're going to be on the other tablets, which would need an investment of 350,000 to 400,000 francs*' (Éditions Suisses Holding); '*we probably won't have an application, because it's too expensive, but a mobile version of the website is one of our goals*' (Nouvelle association du Courrier). Respondents within this group of newspapers also mentioned the cost of acquisitions in terms of staff and technology. The more technologically advanced the product model, the costlier it is. The newspapers with the least resources therefore decide on acquisitions in line with their readership and available financial means. In contrast, the advent of new media raises questions for so-called independent newspapers precisely because of their identity as independent publications. Sources of information for readers on new devices are social media and search engines as well as website headlines. *La Liberté* and *Le Courrier* explained to us that they want to avoid the phenomenon of becoming dependent on data-centric internet companies as well as enticing techniques for selling information.

[2] The *Quotidien Jurassien* publisher gave his answers to the editor, whom we interviewed.
[3] In 2013, SRG SSR generated a 2013 turnover of 1615.5 million CHF, Tamedia 1069.1 and Ringier 1027.3 (Medieninstitut, 2014). In comparison, Editions Suisses Holding achieved a turnover of around 83 million CHF.