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Are news from public service media crowding out private news media? Usage and willingness to pay in Switzerland

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Contents:

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Summary

Public service media are often accused of crowding out private media in the media market. This «crowding-out» thesis is becoming increasingly explosive because in the online sector, many news media – from both public and private media – are fighting for the public's scarce attention and, in some cases, for paying subscribers. By analysing representative survey data from the Reuters Institute Digital News Report (2024) of the University of Oxford, we examine the case for Switzerland and whether the use of SRG SSR news is related to the use of private news media and the willingness to pay for online news. The analysis shows no evidence that SRG SSR is crowding out private media in the information sector. SRG users consume news from private media more frequently than non-SRG users. With a share of 3.5% of the total population, there are also only a few people who only use SRG news online without also using subscription or commuter and tabloid media online. This indicates that public service media tend to be used in a complementary way to those of private media. In contrast, the group of those who only use commuter and tabloid media online is comparatively large (26.5%). The use of SRG online or offline news is also not linked to the (low) willingness to pay for online news – neither positively nor negatively. Instead, the general interest in news is a decisive factor. Based on this empirical data, SRG SSR and the news it offers cannot be held responsible for the fact that private news media sometimes have a problem of reach, or that (too) few people pay for online news. Rather, public and private media organisations should work together to increase the population's interest in news and counter the general «free mentality» on the internet and on social media platforms.

1 Introduction

Public service media (or public media) play a central role in many Western societies, not least because they reach a relatively large number of people in the information sector with high-quality news and enjoy a high level of trust overall (Fürst & Rieser, 2023; Jakobs et al., 2023; Udris et al., 2024). However, public media are operating in an increasingly difficult, tense and politically charged field (Sehl et al., 2020; Zabel et al., 2024). In the digital age, not only private but also public media must offer their content online to secure their social relevance and reach their audience (Stark & Steiner, 2018), as usage habits continue to shift towards digital channels, including news websites and social media platforms (Bonfadelli et al., 2021; Udris et al., 2024). On the internet, however, a multitude of offerings compete, including a wealth of entertainment content and niche offerings (Webster, 2014). In this environment, many countries are seeing a decline in interest in and use of news (Reuters Institute, 2024). In Switzerland, «news deprivation» is constantly increasing (fög, 2023).

With regard to public service broadcasting and its role in the media system, this means two things: Firstly, public broadcasting – like other media organisations – is exposed to increasing competition for users' attention online. Parts of the population are less reached by public broadcasting online, for example, the younger audience compared to the older generations or the formally less well-educated compared to the well-educated (Stark & Steiner, 2018; Schulz et al., 2019). In the medium to long term, this could jeopardise public media's mission to serve the interests of diverse groups and contribute to social integration (Hasebrink, 2023; Jarren, 2019). In Switzerland, the constitution stipulates this for the public media company SRG SSR: SRG «shall take into account the various concerns and interests of the audience with its journalistic offerings and shall strive for a high level of acceptance and reputation among the various target groups» (Art. 3 para. 5). To fulfil their own mandate, public media must therefore provide online offerings that can hold their own in the digital competition for attention and reach society at large.

On the other hand, public media also compete with private media companies for the public's attention. There are fears that public media, due to their size and relatively stable fee financing, distort competition in the media market at the expense of private news media, or even displace them («crowding-out» thesis), leading to negative effects on the reach and/or financing of private news media in the form of subscriptions or micro-payments (Sehl et al., 2020). This reignites a criticism in the digital age that has accompanied public media from the very beginning (Schönhagen & Meißner, 2021, p. 139-140) and has also been incorporated into Switzerland's constitution. Regarding the regulation and promotion of radio and television, it states: «Consideration must be given to the position and role of other media, especially the press» (Art. 93 para. 4 BV). The crowding-out thesis is prominently put forward by private media companies operating in this market (VSM, 2024). For example, Michael Wanner, CEO of the private media company CH Media, recently said in an interview: «SRG is expanding on digital channels and crowding out private publishers, who have to finance their journalistic content with digital subscriptions. It's a bit as if the SRG had published its own daily newspaper in the past. There is no constitutional basis for this» (Müller, 2024). According to this interpretation, public media with their freely available online offerings ensure that people refrain from consuming private information media and do not pay for news.

The crowding-out thesis also characterises public debates on Swiss referendums (Sehl et al., 2020), such as the introduction of the household levy (2015), the (failed) abolition of the license fees (2018) and, most recently, the so called «Halbierungsinitiative», which was submitted in August 2023. The latter calls for a significant reduction in license fees for SRG SSR, with individual households paying a maximum of CHF 200 instead of the current CHF 335 and all companies being exempt from the levy. The initiators of the Halbierungsinitiative write in their argument that «SRG's online expansion plans are rightly criticised by publishers and politicians as a violation of constitutional consideration for private providers» (Komitee, 2022, p. 8). The size and reach of SRG SSR's freely available news are therefore seen as a problem for competition on the online market. Paradoxically, however, the initiators also consider a reduction in fees to be appropriate because SRG's programmes are «dramatically losing viewers» and «young people» «extremely rarely use» the news SRG offers (Committee, 2022, p 7, 11). If one follows these arguments, it is not that public media are a strong competitor, but rather that they do not fulfil their mandate sufficiently.

In view of this charged and sometimes contradictory debate, it is important to verify and discuss the crowding-out thesis based on empirical evidence. The few existing and publicly available studies have so far found little evidence to support the crowding-out thesis (Nielsen et al., 2016). Using survey data from 13 countries (including Switzerland), Schranz et al. (2016) concluded that the use of public media is associated with significantly higher trust in the media, which in turn is linked to a slightly higher willingness to pay. Based on survey data from 28 EU countries Sehl et al. (2020) found no negative correlations between the online use of public media and that of private broadcasters. Instead, they found a positive correlation in Scandinavian countries between the online use of public media and the willingness to pay for online news. Based on survey data from six countries, Fletcher and Nielsen (2017) also found that online use of public media is associated with a higher willingness to pay for online news, in some cases even when additional factors such as age, gender and interest in news are taken into account.

O'Brien (2022) paints a more ambivalent picture. On the one hand, he uses a survey in Germany to show that paying radio license fees does not directly influence the (low) willingness to pay online. On the other hand, he uses a path analysis to show that the low willingness to pay is characterised in particular by the public's «free mentality», i.e. the widespread belief that information is and should be available for free on the internet. According to his analysis, public media would also contribute to this. In a further study, Zabel et al. (2024) modelled the effects that would result if the online news of the Austrian public broadcaster ORF were to be removed. As part of a choice-based conjoint analysis, the preferences of users were recorded using a survey. The subsequent simulation analysis shows that cost-free private news providers such as oe24.at and gmx.at or social media would benefit from the discontinuation of the ORF's online offering, but private news media that rely on subscription models would benefit significantly less. The authors calculate that in an optimistic scenario, all private media together would gain a maximum of around 20,000 new subscriptions as a result of the «freed-up» demand, and in a realistic scenario, a total of around 6,000.

Overall, we can conclude that the international studies to date show no or only minor crowding-out effects due to public offerings of online news. However, these studies have either not analysed Switzerland or have not taken a closer look. The aim of our study is to close this gap to some extent and to focus on news media in Switzerland. In doing so, we are investigating the overarching question: Is the SRG crowding out private news media in the information sector? Specifically, we ask two sub-questions: 1) Does the use of SRG news lead the audience to forego news from private media? 2) Does the use of SRG news mean that the audience is less willing to pay for journalistic content from (private) media in the online sector?

2 Method

Our study used data from a standardised survey collected as part of the Reuters Institute Digital News Report (2024), which we used for a secondary analysis. The Reuters Institute for the Study of Journalism at the University of Oxford commissioned the market research institute YouGov to conduct online surveys in 47 countries, including Switzerland. In Switzerland, the survey was conducted between 12 January 2024 and 12 February 2024 – in French in French-speaking Switzerland and in German in German-speaking Switzerland (n = 2012 adults). This sample was representative of the population (with internet access) in these language regions. Quotas were set for age, gender, region and level of education to ensure the representativeness of the survey panel. Because internet penetration in Switzerland is very high (Latzer et al., 2023), this sample comes close to a sample of the population as a whole.

The survey comprised a series of questions. In addition to socio-demographic questions about age, education or income, these were primarily questions about attitudes towards media (e.g. interest in news), willingness to pay or news usage of certain channels and news brands. The exact wording of the questions and answer options can be found in the online supplement to this study (https://doi.org/10.5167/uzh-261174).

How widespread news brands are in Switzerland with their offline and online offerings is calculated based on the stated usage and the associated reach, namely whether a news brand has been used for news purposes at least once «in the last week». Respondents were given a definition of news at the beginning of the questionnaire: «News refers to national, international, regional/local news and other current information provided via any medium (radio, television, newspapers or online).» Respondents were able to select any number of news brands and offerings from a list of offline (TV, radio or print) and online sources. In the list of online media, the questionnaire also stated that online access can include «websites, apps, social media and other forms via the internet». All the news brands surveyed and included in our study are listed in Table 1.

We categorised the news brands surveyed into three overarching media types: 1) public media (SRG SSR news), 2) commuter and tabloid media and 3) subscription media. We summarised several of the 12 media types used in our Yearbook Quality of the Media 2024 (see Methodology section of t Yearbook 2024) in a new way. These three overarching media types have different structural requirements, such as financing and business models.

In the information sector, public media includes the news programmes offered by public radio and public television, which are operated by the largely fee-financed Swiss Broadcasting Corporation SRG SSR. SRG SSR is subject to a performance mandate that requires, among other things, the broadcasting of relevant information programmes that are geared towards the common good (Art. 3 para. 2 Licence). SRG SSR provides information not only via its television and radio channels, but also online via its news services, apps and social media channels. These information offerings – as well as the entertainment offerings (not analysed in this study) – are available to users free of charge and without paywalls or the like. However, the offerings are predominantly financed by mandatory license fees, which every household in Switzerland and many companies have to pay. Commuter and tabloid media are reach-oriented, privately owned news media that focus relatively strongly on sports and human-interest topics and are traditionally financed primarily by advertising. Commuter media, sometimes also referred to as «free media», are offline and online news brands that are free to users. While the printed editions of Blick, SonntagsBlick and Le Matin Dimanche cost money, much of their online content is still available free of charge, even though the Blick brand introduced a «freemium paywall» in 2023, where selected articles are subject to payment. However, what characterises the commuter and tabloid media we surveyed is that their parent companies (TX Group, Ringier and CH Media) all have news brands in their portfolios that can be categorized as the subscription media type, which involves payment for news.

The subscription media type includes brands that, in comparison to commuter and tabloid media, focus strongly on hard news topics, are privately owned and rely on subscribers. Most of these brands exist as printed subscription newspapers (often with a long history) and as online brands. This media type also includes printed Sunday newspapers and magazines as well as their online offshoots, which are also primarily dependent on subscribers. We also include the online pure player Heidi.news in this type because its business model also follows a subscription model. Compared to public media and commuter and tabloid media, users of subscription media in the online sector are more often faced with paywalls, i.e. only part of online news is freely available without a subscription. How hard these paywalls are varies from case to case.

These three media types cover a very large part of the news sector. There are also other news brands and media types (some of which were also surveyed) which were not included in our study for three reasons: 1) brands from abroad (such as lemonde.fr, Spiegel Online or news from private German television stations), because the focus of our study is on Swiss news media; 2) regional private radio and television stations, because their use was surveyed for the offline area but not for the online area, which is also fundamental to our analysis; 3) brands from email providers (such as bluewin.ch or gmx.ch) and the online portal nau.ch, because our focus is on private media companies that also have paid-for brands in their portfolio and are dependent on paying users (e.g. the media company CH Media, which not only offers the free Watson.ch, but also subscription media such as Aargauer Zeitung).

We determined the extent to which SRG competes with private information media in the consumer market by analysing usage patterns. As the respondents were able to specify all the media brands that they used themselves, the data set provides insight into various usage patterns, i.e. combinations of used and unused media types. For example, we examined the extent to which users of SRG news also use or do not use commuter and tabloid media or subscription media.

We used a binary logistic regression analysis to examine the effects of SRG on the willingness to pay

Media type	Offline area	Online area
Public media	TV SRF 1/2, TV SRF info, TV RTS Un/Deux, Radio SRF 1/2/3/4/Virus, Radio RTS La Première/Espace Deux/Couleur 3	SRF (News), RTS (News)
Commuter and tabloid media	20 Minuten, 20 minutes, Blick, SonntagsBlick, Le Matin Dimanche	20 Minuten online, 20 minutes online, Blick online, Watson.ch, Le Matin online, Blick online (en français), Watson.ch (en français)
Subscription media	24heures, Aargauer Zeitung, Arcinfo (L'Express & L'Impartial), Basler Zeitung, Le Nouvelliste, Le Temps, Luzerner Zeitung, Neue Zürcher Zeitung, NZZ am Sonntag, SonntagsZeitung, Tages-Anzeiger, Tribune de Genève, Weltwoche, Wochenzeitung (WoZ), «other regional or local newspapers», «other Sunday newspapers or weekly magazines».	24heures.ch, aargauerzeitung.ch, arcinfo.ch, baslerzeitung.ch, Heidi.news, Le Nouvelliste online, Le Temps online, luzernerzeitung.ch, NZZ online, Tages-Anzeiger online, Tribune de Genève online, weltwoche.ch, «other regional and local newspapers online», «other websites of Sunday or weekly newspapers».

Table 1: Media sample

The table shows the news brands that were surveyed in the Reuters Institute Digital News Report in the offline and online areas and taken into account for our study (source: Reuters Institute, 2024). The allocation of these news brands to the three media types is also shown.
Reading example: In the questionnaire, respondents could select whether they had used TV SRF1/2 for news purposes offline «in the last week». We take this brand into account and assign it to the public media type.

for online news. The questionnaire asked whether a person had paid for online news «in the last year» (regardless of whether it was a one-off payment, a subscription or a donation). In the regression, we tested how this willingness to pay was related to media use of different types of media (e.g. SRG online), attitudes (e.g. interest in news) and socio-demographic characteristics (e.g. age).

3 Results

In order to better categorise the distribution and thus the «size» of the media types, we first present key figures on the reach of the media types. We show the respective reach in different segments of the population and differentiate between the reach of offline and online channels (3.1). In a second step, we present the usage patterns and focus on the question of the extent to which users of SRG news also access news from private media (3.2). In a third step, we analyse the extent to which the use of SRG news and other potential factors are linked to the willingness to pay for online news media (3.3).

3.1 Reach of public and private news media among the population

All three media types reach large sections of the population in Switzerland with their news services via different channels (see Table 2). The most widespread are commuter and tabloid media. 69.2% of respondents use at least one of these brands, such as 20 Minuten, Blick or Watson. SRF and RTS have a reach of 65.4% of the population with their news. Subscription media such as Le Temps, Aargauer Zeitung and Heidi.news have a total reach of 53.4%.

However, the reach is not equal in all population groups. All three media types have more difficulty reaching people with (very) little interest in news or politics, with unclear political self-identification and with less trust in the media. Their reach is also lower among people for whom social media is the main source of information.

The three media types also differ to some extent in terms of which population segments are better or less covered. While SRG, commuter and tabloid media have a weaker reach among 25- to 34-year-olds and 18- to 24-year-olds, subscription media have a somewhat lower reach among 35- to 44-year-olds. While SRG and subscription media reach men better than women and people with high level of education better than people with a low level of education, there are hardly any differences in this respect between commuter and tabloid media.

3.1.1 Reach of offline and online channels

The reach differs not only in terms of population groups, but also in terms of which channels are used to reach them (see Figure 1). Most of the media brands of these three media types have a long history rich in tradition. However, with increasing digitalisation and changes in the audience's usage habits, presence on digital channels is becoming increasingly important for all three media types. Because both offline and online use were surveyed, the data set allows a comparison of the reach of these channels.

The results show that SRG reaches large sections of the population with its traditional TV news programmes and radio news programmes (59.5%), while the use of SRG's digital news is significantly lower (27.5%). Subscription media also fail to achieve the same reach online (35.5%) as offline (44.1%) their online reach is still higher than that of SRG. Finally, the commuter and tabloid media are now shown to be much more widespread on their online channels (59.6%) than through their print channels (45.6%). They are also the media that mark the online sector the most.

As Figure 1 shows, SRG predominantly reaches an online audience that also uses SRG news offline on radio or television, because if one considers SRG's reach across all channels, i.e. how many people use them (whether offline or online), then its combined reach (65.4%) is not much higher than the reach offline alone (59.5%). SRG online news therefore only achieves a small additional reach (5.9%). The same is true, albeit to a lesser extent, for subscription media (9.3%). Commuter and tabloid media, on the other hand, can benefit from a more substantial additional reach in the online sector (23.6%).

Population segments and groups		SRG SSR reach	Reach of commuter/ tabloid media	Reach of subscription media
Language region	German-speaking Switzerland	65,5 %	70,1 %	**50,4 %**
	Suisse romande	**65,2 %**	**67,2 %**	60,2 %
Age groups	18–24	61,1 %	**59,5 %**	60,7 %
	25–34	**53,7 %**	66,6 %	49,8 %
	35–44	62,2 %	71,2 %	**48,4 %**
	45–54	61,3 %	74,2 %	50,4 %
	55+	73,2 %	69,3 %	56,4 %
Gender	Men	69,9 %	**69,0 %**	59,6 %
	Women	**61,0 %**	69,5 %	**47,3 %**
Income	Low	**62,5 %**	**69,5 %**	**52,3 %**
	Medium	69,4 %	71,0 %	55,2 %
	High	69,6 %	71,9 %	60,3 %
Education	Low	**61,0 %**	71,0 %	**49,6 %**
	Medium	64,3 %	70,7 %	51,6 %
	High	68,9 %	**66,6 %**	57,3 %
Political self-identification	Left	74,9 %	65,4 %	65,8 %
	Centre	70,1 %	72,7 %	57,5 %
	Right	66,1 %	71,1 %	52,9 %
	Unclear	**41,2 %**	**59,8 %**	**29,6 %**
Trust in media	(Very) Low	**51,8 %**	**61,1 %**	**48,9 %**
	Medium	63,0 %	68,9 %	52,0 %
	(Very) High	76,2 %	74,9 %	57,5 %
Interest in news	(Very) Low	**34,7 %**	**47,3 %**	**30,4 %**
	Medium	63,3 %	68,0 %	48,4 %
	(Very) High	77,4 %	78,0 %	64,9 %
Interest in politics	(Very) Low	**50,7 %**	**62,8 %**	**38,6 %**
	Medium	71,2 %	73,1 %	54,7 %
	(Very) High	77,5 %	74,1 %	70,1 %
Main source of information	News sites	61,3 %	78,0 %	54,4 %
	TV	83,9 %	71,3 %	59,2 %
	Social Media	**49,0 %**	**62,7 %**	**39,9 %**
	Print	69,9 %	73,0 %	76,7 %
	Radio	78,6 %	63,0 %	52,4 %
Total population		65,4 %	69,2 %	53,4 %

Table 2: Cross-channel reach of media types among the population

The table shows the reach of the media types (usage during the «last week» for news purposes) in the overall population at large and in the various population segments and groups (source: Reuters Institute, 2024). The groups within the segments for which the media types have the lowest reach are highlighted in bold (n = 2012).
Reading example: In the group of people with a (very) low interest in news, SRG has a reach of 34.7%. This reach, marked in bold, is significantly lower than SRG's reach among people with a medium (63.3%) or (very) high interest in news (77.4%).

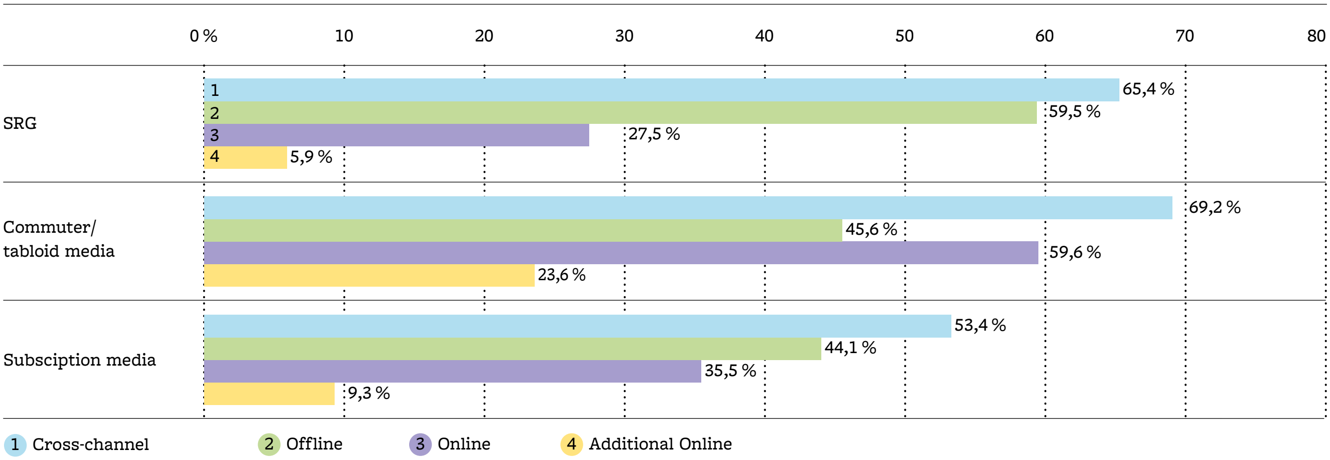

Figure 1: Reach of media types across channels and in online and offline channels

The chart shows the reach in the total population (usage during the «last week») for each media type, across all channels (i.e. regardless of whether offline or online), only offline (print, TV or radio) or only online (source: Reuters Institute, 2024). The additional online reach is also indicated, i.e. how much reach the use of online media contributes in addition to offline reach (n = 2012).
Reading example: SRG has a cross-channel reach of 65.4 % of the total population. This means that 65.4 % of respondents have used at least one SRG brand for news purposes «in the last week». SRG's reach among the population is 59.5 % with its offline offerings and 27.5 % with its online offerings. This means that SRG's online reach adds around 6 percentage points to its offline reach.

3.2 Is SRG crowding out private news media in the public market?

The following section examines whether and to what extent SRG is crowding out private news media in the consumer market with its news formats. Usage alone is relevant for private media for two reasons: Firstly, it is highly unlikely that people will pay for media if they do not use it or use it very little. Secondly, the media need a certain audience reach even if they are dependent on advertising revenue.

First, we are interested in a higher-level perspective. Figure 2 shows the cross-channel reach of private media types, i.e. their reach regardless of whether these media types are used offline or online. The reach for two different user groups were analysed: people who generally use SRG (across all channels. including offline and online) and those who do not.

These analyses show that the use of SRG news is positively related to the use of commuter and tabloid media and subscription media. Compared to SRG non-users (38.2%), SRG users (61.4%) consume subscription media significantly more often (Cramer's V = 0.222). Commuter and tabloid media are also used significantly more frequently by the SRG audience (75.1%) than by non-SRG users s (58.2%) (Cramer's V = 0.174). In both cases, the effects are statistically weak. This means that the use of private media types also depends on many other factors, such as age and interest in news.

Below, we focus on the online sector and exclude offline use. To examine whether public media specifically crowd out online news from private media, Figure 3 focuses on online usage. A distinction is made between people who use SRG news online and online users who do not use SRG news online. People who do not use online media at all are not included in the following analysis.

The complementary use of SRG news is also clear with regard to these online reach figures. Users of SRF or RTS use online news from commuter and tabloid media slightly (but not significantly) more often (73.1%) and online news from subscription media significantly more often (50.8%) than online users who do not access SRF or RTS online (69.3% and 37.7%, respectively). In the online sector, SRG users are therefore typically multiple users. In turn,

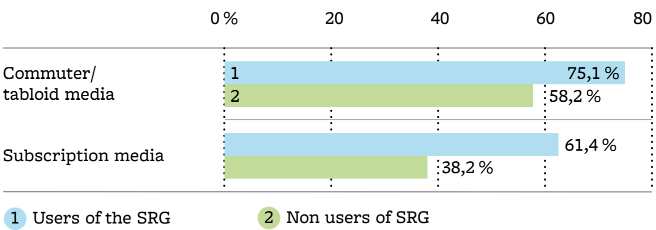

Figure 2: Cross-channel reach of private media types in comparison

The chart shows the cross-channel reach of commuter and tabloid media and subscription media for two different audiences (source: Reuters Institute, 2024). A distinction is made between people who have used at least one SRG news brand across all channels and people who have used neither offline nor online SRG news brands (usage during the «last week») (n = 2012).
Reading example: Commuter and tabloid media are used by 75.1 % of people who also use SRG news. In comparison, commuter and tabloid media are used slightly less (58.2 %) by people who do not use SRG news.

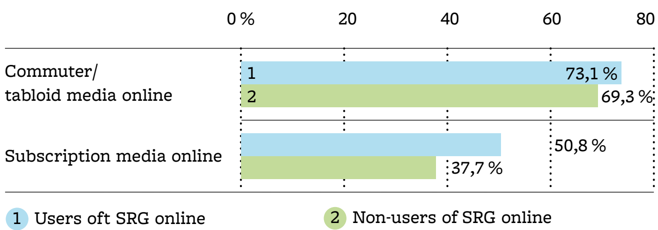

Figure 3: Reach of private media types in the online sector

The chart shows the online reach of commuter and tabloid media as well as subscription media for two different audiences (source: Reuters Institute, 2024). A distinction is made between people who use at least one SRG news brand online and people who use online news but not from SRG. Data basis: all people who used at least one online medium during the «last week» (n = 1702).
Reading example: Subscription media are used online by 50.8 % of those who also use SRG online news. In comparison, subscription media are used by fewer people (37.7 %) who do not use SRG online news.

there is a weak positive effect of SRG online use on the online use of subscription media (Cramer's V = 0.125); this means that the online use of subscription media also depends on many other factors.

While the focus was initially on the complementary, i.e. multiple use of media types, we now turn to the exclusive use of the various media types. «Exclusive» means that only one of the three media types is used online. We show the size of the groups of exclusive users in relation to their share of the total population in Figure 4, which shows that exclusive users of SRG online news make up only 3.5% of the Swiss respondents: Firstly, only 27.5% of the total population use SRG SSR online news (cf. Figure 1). Secondly, only a minority of this online SRG audience, namely 12.7%, are exclusive users, i.e. they do not use commuter and tabloid media or subscription media in addition. This means that 12.7% of 27.5% correspond to the 3.5% of exclusive SRG online users mentioned above. The group of exclusive users of commuter and tabloid media is much larger, accounting for 26.5% of the total population. These people – the equivalent of just under half of the audience of commuter and tabloid media (44.4%) – do not use either SRG or subscription media online. Only 8.5% of the total population use subscription media online.

Therefore, there is no evidence overall that SRG's online news would lead to the crowding out of private online media in the consumer market. The proportion of exclusive users of SRG online news is small. The use of SRG news usually goes hand in hand with the use of private media and is therefore complementary. However, the fact that these are statistically small effects also means that many other factors, such as interest in news, are decisive for the use of private online media services.

3.3 Willingness to pay for private media

It is particularly important for the business model of subscription media that the audience pays for the use of news. In Switzerland, 17.0 % of the population spend money on online news in 2024. In other words: Only around one in six Swiss say they paid for online news in some form «in the last year». Willingness to pay has been stagnating in Switzerland (as in many other countries) for several years (Reuters Institute, 2024; Udris et al., 2024, p 20). This low proportion does not mean that the Swiss do not consume online news, as most respondents (84.6%) used at least one of the online media surveyed «in the last week». Even the audience of online subscription me-

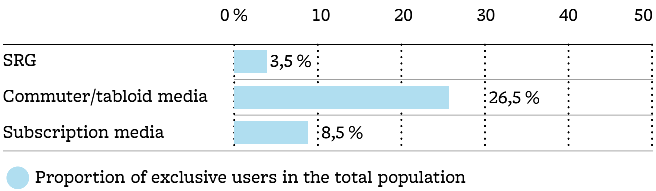

Figure 4: Exclusive users of the media types in the online sector

The chart shows the shares of exclusive users of the three media types in the online sector compared to the total population. «Exclusive» means that an audience does not use the media brands of the other two media types (source: Reuters Institute, 2024) (n = 1702).
Reading example: The proportion of the population who use commuter and tabloid media online, but no SRG news and none of the subscription media, is 26.5 %.

	B
Use of media types	
SRG offline	.17
SRG online	–.12
Commuter and tabloid media offline	.21
Commuter and tabloid media online	–.18
Social media as the main source of news	–.44
Attitudes	
Trust in media	.07
Interest in news	**.34*****
Interest in politics	**.28*****
Unclear political stance	**–.68***
Sociodemographic characteristics	
Language region[a]	**–.39****
Gender[b]	**.49*****
Age	**–.03*****
Income	.00
Level of education	.06
(constant)	(1.53**)
Nagelkerke R^2	**.15**

Table 3: Regression to explain willingness to pay for online news

The table shows the results of a binary logistic regression analysis (n = 1533 respondents for whom data was available for all factors) (source: Reuters Institute, 2024). The regression coefficients B shows how the analysed factors correlate with willingness to pay. Significant correlations are marked with an asterisk (* p < 0.05; ** p < 0.01; *** p < 0.001).
[a] Suisse romande is the reference category.
[b] female is the reference category.
Reading example: Interest in news correlates significantly positively with willingness to pay (B = .34).

dia, which predominantly cost money, is only partially willing to pay (31.8%). Thus, subscription media are apparently also consumed online free of charge by most of their audience. All of this suggests that the typical online media usage of the Swiss population is free of charge use.

Using a binary logistic regression analysis, we examined which factors in the model influence the willingness to pay for online news. The regression analysis has the advantage that factors are not tested in isolation, but simultaneously. We included the usage preferences and characteristics of the users that were already the focus of this analysis (see Table 2). These include 1) the use of certain types of media (offline or online – namely those types of media that are not primarily dependent on subscribers) 2) the socio-demographic characteristics of the respondents (such as gender, age and income). International studies have already analysed the factors that influence willingness to pay based on these variables for other countries (Fletcher & Nielsen, 2017, p. 1185; O'Brien et al., 2020).

The analysis shows that the use of different media types has no influence on willingness to pay in the model (see Table 3). There are no statistically significant correlations between willingness to pay and the use of SRG content via online channels (-.12; p = .404) or traditional channels (B = .17; p = .267). There are also no discernible effects on willingness to pay when using commuter and tabloid media (offline and online). People who use social media as their main source of news tend to show less willingness to pay for online news. However, this correlation is also not significant (B = -.44; p = .056).

While the use of different media types has no significant effect on willingness to pay, the attitudes of the respondents can partly explain willingness to pay. Both interest in news (B = .34; p < .001) and interest in politics (B = .28; p < .001) have a significant positive effect on willingness to pay for online news. People who are strongly interested in news or politics are therefore more willing to pay for news. In contrast, people who have an unclear political self-identification, i.e. who cannot place themselves on the political spectrum (left-right axis), show significantly less willingness to pay (B = - .68; p = .029). Trust in the media (B = .07; p = .287), on the other hand, has no effect and therefore does not explain any further variance. Some significant correlations

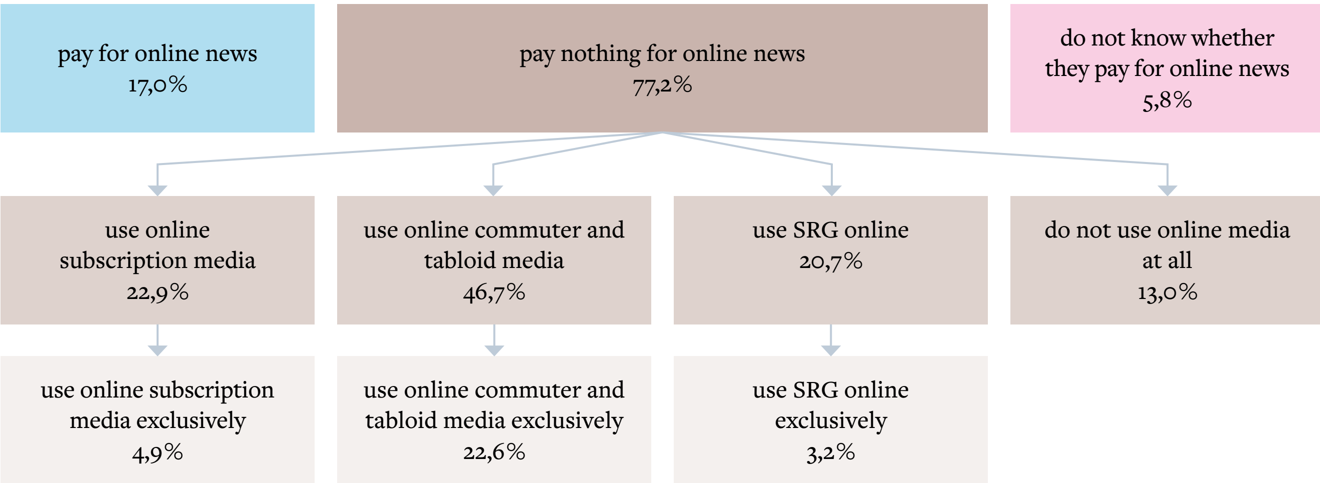

Figure 5: Willingness to pay in the context of the size of online audiences

The chart shows the proportions of different online audiences in the population. Within the group of those who pay nothing for online news, a distinction is made between users and exclusive users of the three media types (source: Reuters Institute, 2024) (n = 2012).
Reading example: In Switzerland, 22,9 % of people do not pay for online news and use at least one subscription media brand online at the same time. People who use subscription media exclusively online but do not pay for online news make up 4.9 % of the population.

were also found with regard to socio-demographic characteristics. Users from German-speaking Switzerland show less willingness to pay for online news than users from French-speaking Switzerland ($B = -.39$; $p < .008$). In addition to the language region, gender and age are also significant factors: men are more likely to pay for online news than women ($B = .49$; $p < .001$), and older people show less willingness to pay for online news compared to younger age groups ($B = -.03$; $p < .001$). Overall, the regression model explains 15% of the variance of the variable «willingness to pay» (Nagelkerke $R2 = .15$) and is therefore comparable with earlier, similarly designed analyses (Fletcher & Nielsen, 2017, p. 1185).

The regression analysis therefore shows that the use of certain types of media does not in itself explain the low willingness to pay. It is now worth taking a closer look at the group of people who do not currently pay for online news.

This is because the news usage and willingness to pay of the Swiss may change in future – also depending on which news brands will be available, with what content and what quality at what price. Of course, we cannot look into the future with our data, but it does allow us to take stock of the size of the various audiences that do not (yet) pay for online news. This is particularly important for those information media that are increasingly dependent on paying users

The starting point of the figure 5 is that the vast majority of the Swiss population pays nothing for online news (77.2%). This is demonstrably not primarily because people do not use online media, because such people make up only 13.0% of the total population. Instead, we see that many people actually use online news of various media types without paying for them. Looking at the media types, it is noticeable that the largest group of non-payers is those who use commuter and tabloid media online (46.7%). This group is significantly more strongly represented in the overall population than those non-payers who use subscription media online (22.9%) or SRG offerings news (20.7%).

It is particularly interesting to look at the non-paying exclusive users, i.e. those who only use one of the three media types analysed. In contrast to Figure 4, Figure 5 only shows those exclusive users who do not pay for online news. This is where the greatest «leverage effect» or the greatest «freed-up demand» would arise if – purely theoretically – a media type were to be cancelled. Such a scenario was calculated for the hypothetical case of the ORF news site being discontinued in Austria (Zabel et al., 2024). In relation to Switzerland, for the hypothetical case of SRG leaving the market, this would mean that people who only use SRG services online (exclusive users) would have to decide either to forego online news or to use a different type of media, e.g. commuter and tabloid media or subscription media.

Figure 5 shows that at 3.2% of the total population, the audience that exclusively uses SRG online news and does not pay for online news is relatively small. Against this backdrop, private media companies' hope that a reduction or even elimination of SRG online news would significantly increase the proportion of paying users of subscription media does not appear justified. A substantial proportion of the Swiss population (22.6%) uses commuter and tabloid media exclusively and at the same time pays nothing for online news. It is also worth noting that 4.9% of the population use subscription media exclusively online (i.e. they consume both commuter and tabloid media and SRG offerings online) and still pay nothing. It is possible that such users only access content until they hit a paywall.

4 Conclusion

SRG SSR's news brands and services are still widely distributed across large sections of the Swiss population (65.4%). They also achieve a reach of over 50% in all age groups. Although the group of 25- to 34-year-olds could be reached even more, our data argues against the idea that «the young» would «extremely rarely use» SRG news, as the proponents of the «Halbierungsinitiative» claim (Komitee, 2022, p. 11). In the online market, however, SRG news reaches 27.5% of the population, and thus achieves a smaller reach than its offline reach and compared to the digital news of commuter and tabloid media as well as subscription media. Like many other public media in Europe (Schulz et al., 2019), SRG mainly reaches parts of the same audience online that it already reaches via its traditional channels. It therefore hardly taps into any additional audience segments. Accordingly, SRG must position itself better in future, especially online, and achieve a greater reach if it wants to fulfil the mandate set out in its license in the long term and reach the population, which is increasingly accessing information via digital channels (Bonfadelli et al., 2021; Jarren, 2019; Udris et al., 2024).

At the same time, our analysis does not indicate that the use of SRG news would reduce the use of subscription media or commuter and tabloid media. On the contrary, complementary use clearly predominates, even in the online sector. This means that there are only a few users (3.5% of the population) who get information online exclusively through SRG news. Instead, the use of SRG news via digital or traditional channels is accompanied by greater use of both commuter and tabloid media as well as subscription media. Contrary to the crowding-out thesis, it can therefore be concluded that SRG strengthens rather than weakens private media companies in the market. However, these positive statistical correlations are not strong. The use of news offered by private media types is therefore influenced by many other factors, such as interest in news.

We also found no confirmation of the crowding-out thesis with regard to willingness to pay. The use of SRG news – as well as other media types – is not significantly related to whether people pay for online news. This is consistent with the results of a study from 28 EU countries (Sehl et al., 2020). However, our regression model shows that willingness to pay is influenced by the attitudes of the respondents and their socio-demographic characteristics. People who are highly interested in news and politics are also more likely to spend money on digital news services. This also applies to men and younger people. This is presumably related to two factors: Firstly, women and their interests and positions are significantly underrepresented in news coverage (Schwaiger et al., 2021). Secondly, younger generations generally have a greater affinity for the use of online content (Groot Kormelink, 2023; Schneider & Eisenegger, 2018). In addition, there is a greater willingness to pay for online news in French-speaking Switzerland than in German-speaking Switzerland, which could also be related to the slightly higher reach of subscription media in French-speaking Switzerland (see Table 2). The clear influences of news interest and age that we see in Switzerland have already been tested by Fletcher and Nielsen (2017) and were found in all six countries they analysed.

Although our regression model has identified some factors, it cannot explain a large part of the low willingness to pay. In view of the research (O'Brien, 2022), we suspect that the «free mentality» has become so dominant on the internet that it overrides many other factors. Regardless of whether there is public media or free offerings from private media and how strong these media types are in individual countries, people have become accustomed to the fact that much or even most information is available free of charge. In some cases, people also consider it their right to access information on the internet free of charge (Groot Kormelink, 2023). As the use of specific media types itself plays little or no role in the low willingness to pay and the associated «free mentality», new, cooperative approaches to solutions appear more effective from the media companies' point of view. These could, for example, aim to generally increase interest in news in political education and the promotion of media skills, even among adults. Of course, another strategy would be for media companies to focus on the existing core group of paying subscribers (O'Brien, 2022) and possibly increase subscription prices at the expense of discount models, which are widely used (Reuters Institute, 2024). However, sharp increases in subscription prices could significantly reduce the number of paying subscribers (Chyi & Jeong, 2024; Groot Kormelink, 2023). Finally, efforts should also be intensified to better monetise journalistic content that is distributed via social media.

Our data also suggests in another respect that SRG SSR working towards fewer (or no) online activities would hardly benefit the private media from an economic perspective. Of course, the results cannot indicate how likely the various user groups are to spend money on online news in future. However, they do show that the additional potential among the SRG online audience is relatively small. This is because the non-paying exclusive users of SRG SSR make up a relatively small proportion of the population, at 3.2%. Even the group of people who use subscription media exclusively online but do not pay for it is slightly more strongly represented in the population, at 4.9%. In purely numerical terms, the potential for private commuter and tabloid media is significantly greater, as 22.6% of Swiss people use them exclusively online and do not spend any money on online news. Against this backdrop, private media companies need to continue to strategically clarify how they should deal with paywalls for their subscription media and what role the often cost-free news from the commuter and partly also from the tabloid sector should play, some of which are offered by those media companies themselves.

Limitations

The strength of our study is that it draws on a large data set from the Digital News Report of the Reuters Institute (2024) at the University of Oxford. There, media usage was surveyed for various traditional and digital channels and media brands. Nevertheless, this data set cannot answer all the questions that are important in the context of the crowding-out thesis. A frequent criticism levelled at public media is that they are crowding out private media (also) in the areas of sports and entertainment. As the survey conducted as part of the Digital News Report focuses on the use of news, our study cannot make any statements about the relationship between SRG SSR and private media in the areas of sports and entertainment. Apart from questions on willingness to pay, the survey does not include any questions on the «free mentality», i.e. people's attitudes regarding whether information on the internet should be available free of charge as a matter of principle. Such a supplement would provide a more comprehensive picture.

Our study cannot discuss the results of all current empirical studies. We are aware that there are studies, particularly by interest groups, that shed light on the relationship between public and private media – with very different findings (e.g. BDZV, 2023; EBU, 2023). There are press releases and very brief summaries, but the results and information on the methodology are not publicly available (as of September 2024). We believe it makes sense to focus on those scientific studies that are publicly available and can be evaluated accordingly.

In line with previous studies (Fletcher & Nielsen, 2017; Sehl et al., 2020), the data we analysed on the use of news is based on questions about which news brands were used at least once a week. Regarding news media, this allows us to provide information on usage patterns and the exclusive use of certain types of media. However, we cannot make any statements about the respective duration of use based on this data. In addition, the data is based on self-reporting by the respondents. We know from research that people sometimes overestimate their news consumption in surveys. However, there are indications that survey data, especially in countries with non-polarised and non-fragmented media systems such as Switzerland, can also provide people with largely good and valid information about their news consumption (Cardenal et al., 2022). Whether people's answers in surveys are also valid when it comes to willingness to pay can only be clarified when correspondingly differentiated data is available from the media companies (e.g. online subscribers residing in Switzerland).

Our survey reflects the current situation. We cannot determine the extent to which Swiss news consumers would use other media if the media supply were to change fundamentally, e.g. due to media policy decisions. In addition, our study focuses on the possible effects of SRG SSR on the audience market (news usage) with regard to willingness to pay and thus revenues from readership. We cannot make any statements about the advertising market. The advertising market is still an important pillar of many private information media (Künzler, 2022) – including in the online sector (Udris et al., 2023, p. 11f). At the same time, however, it has shrunk significantly due to the dominance of tech platforms. Further studies are needed here, e.g. to what extent media usage and the associated reach are specifically linked to the advertising revenue generated by Swiss information media.

Finally, by focussing on the «crowding-out» thesis, our study only sheds light on one aspect of the economic debate on public media. The fact that public media can also have positive effects on the national economy (BAK Economics, 2024) is not addressed in our study. The contribution of public media to a democratic society should also be critically examined and discussed (Castro et al., 2022). Further empirical research should be carried out to determine the extent to which the findings of an international study also apply to Switzerland: countries that invest financially in independent public and private media are at the same time demonstrably «healthy» democracies (Neff & Pickard, 2024).

Online Supplement

The questionnaire on which this study is based is available online: https://doi.org/10.5167/uzh-261174

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