

Radio programmes of private operators with a performance mandate and a fee-splitting licence 2014

Summary

The 2014 programme analysis of private commercial radio operators took into account all 17 programmes with a fee-splitting licence.

In comparison to the previous year, radio stations with a fee-splitting licence broadcast less regional information, whilst foreign reporting increased. The operators sometimes interpret their performance mandate very differently. Programmes differ most strongly when it comes to the quantity of information/regional information. French-speaking Switzerland's operators offer their public by far the most in this respect.

Key methodical data

The following programmes with a share in dues were studied in 2014:

German-speaking Switzerland: Radio BeO, Canal 3 (German programme), Radio Freiburg (German programme), Radio Grischia, Radio Grischia Südbünden, Radio Munot, Radio Neo 1, Radio Rottu

French-speaking Switzerland: RJB, RFJ, RTN, Canal 3 (French programme), Radio Chablais, Radio Fribourg (French programme), Rhône FM

Italian-speaking Switzerland: Radio Fiume Ticino, Radio 3iii

Sample: An artificial week (business days) in the period from 17 September to 22 December 2014

Sample dates: M, 22nd December, Tu, 26th August, W, 17th September, Th, 4th December, F, 10th October

Analysed airtime: daily 6.30 – 8.30 AM; 11.30 AM – 1.30 PM; 5.00 – 7.00 PM

Music analysis: Wednesday, 17th September; 5.00 AM to 7.00 PM

Total programme hours analysed: 748h

Programming concepts influenced by many factors

In Switzerland, 12 commercial radio operators broadcasting a total of 17 different programmes receive a share of the licence fee. What they share is that they broadcast their programmes in regions lacking in infrastructure, with low financial potential. In order to fulfil their statutory performance mandate, they receive public funds.

Despite similar conditions, the result is often very different programme concepts. The competitive environments prevailing in the different language regions and different organisational cultures and programme philosophies are likely the main cause of these differences.

In **German-speaking Switzerland**, the programmes of Radio BeO (Bernese Oberland) and Radio Rottu (Upper Valais) are examples of different programme philosophies. Structurally, they operate under similar conditions, and in the field of regional information both stations compete with the regional journal of Radio SRF 1. The Bernese Oberland radio, however, broadcasts a pro-

gramme with a high proportion of dialogue, extensive regional reporting, and an independent music format, including a high proportion of local music. The neighbouring Upper Valais operator, in contrast, relies on a music-dominated, classic accompanying programme, dominated by international chart tracks from the last two decades. Information about national and international events is given greater weight than information on regional topics.

In **French-speaking Switzerland**, where SRG SSR has no regional programmes on the market, radio stations with a fee-splitting licence have a near-monopoly on regional information, which strengthens their position and results in their information services being considerable and significantly greater than in German-speaking Switzerland. Nevertheless, the contrasts between the different programmes are similarly large: for example, the French-language programme of the bilingual Canal 3 has lots of music and less (regional) information in the programme and offers the least up-to-date music format of all the radio stations with a share of the licence fee in French-speaking Switzerland. The French-language programme of the similarly bilingual Radio Fribourg, in contrast, addresses a younger public musically, but has a rather high proportion of dialogue, with almost twice as much regional information as Canal 3.

The situation is different in **Ticino**, where the three radio programmes of SRG SSR fully cover the regional information segment. Additionally, strong radio competition from neighbouring Italy puts pressure on Swiss private radio, above all in the advertising market. The result of this general situation is that the private radio stations have limited leeway for strategic programming. In the information segment, they hardly compare to the powerful SRG competition, which they can only challenge on a sub-regional level. This barely makes it possible to build up enough listener coverage to secure their existence. This is likely the reason why, on the one hand, the information services of Ticino's private radio stations are comparatively modest and why, on the other hand, they try to use a very young music format to occupy a niche that SRG SSR has not yet, or not optimally, occupied. The result is that the two programmes are very similar, differing almost only through nuances in music format and information.

Programme dynamics despite weak competition

With the exception of the two Ticino stations, Swiss private radio stations with a fee-splitting licence are exposed to less competition than private radio stations active in more financially profitable regions. The pressure to adapt or differentiate programming services because of target group considerations or movements by competitors is therefore much less than in regions with more intense competition. Less dynamics in programme and format are therefore expected among radio stations with a fee-splitting licence. However, this assumption is only partially correct. Apparently, other factors (cost pressure, change in needs of the public, etc.) are in play that lead to private radio stations always being on the hunt for **result optimisation**. Some of the programmes studied have changed noticeably over the period of one year.

Most conspicuous are the changes at Radio **Rottu**, whose programming underwent a re-launch that is obviously oriented towards internationally recognised format radio standards: the proportion of music was increased, the orientation towards pop accentuated, and the majority of the audience more strongly addressed. On the other hand, Rottu cut back on information, reducing it primarily to domestic and foreign political topics that can easily be covered by agency reports.

Somewhat less prominent, but still conspicuous, are the changes experienced since 2013 by radio stations belonging to the **BNJ Group** operating in the Arc Jurassien. These are firstly expressed in a clear rise in the proportion of music. This did not occur exclusively to the detriment of information, but also at the cost of other spoken contributions. However, information at BNJ also shows characteristic changes: international information increased markedly, whilst national and regional reporting declined. Regional information decreased by about one-fifth on average between the three BNJ radio stations compared to the previous year, but is still – especially in a pan-Swiss comparison – at a high level. The BNJ radio stations also adjusted their music formats during the one-year period, though the changes vary. RFJ has made its music significantly younger, whilst RTN and RJB more often play older tracks than in the previous year.

Differing interpretations of the performance mandate

All commercial private radio stations have the same performance mandate. It consists primarily of providing relevant information about various topics during prime time on workdays, depicting diverse opinions and accommodating the entire service area. How and to what extent this is realised is left largely to the operators. That these interpret their mandate extremely diversely is already shown by the share of broadcast time that is available for information. Among the 17 radio stations with a fee-splitting licence, it ranges from 6% (Fiume Ticino) to 28% (Fribourg F, Rhône FM). As no programme analysis data for commercial radio stations without a fee-splitting licence is available for 2014, a comparison with them is not possible. Measured by the most recently available pan-Swiss programme analysis from 2013¹, it can, however, be assumed that the information services of radio stations with a fee-splitting licence are clearly **better** than those that do not receive a share of the licence fee.

In a comparison of the **language regions**, radio stations with a share of the licence fee in French-speaking Switzerland broadcast the most information, those in Ticino the least. The difference is considerable: the average share of information in French-speaking Switzerland's radio stations is more than twice as large as in Ticino.

¹ Publicom: Analyse der Radioprogramme der privaten Veranstalter 2013. Kilchberg 2014.

In **comparison to the previous year**, the average share of information in all three sections of the country has remained practically unchanged. However, this is not necessarily true for each individual station. Most conspicuous is Radio Rottu, which has massively reduced its information. RTN has also cut back on its information. Other stations (e.g. Rhône FM, Munot) have, however, expanded their information, and considered all radio stations with a fee-splitting licence in Switzerland; the offer of information is stable.

This is not, however, true for **regional information**. The weight has slightly shifted since 2013: regional information has been reduced by an average of about three minutes per day, whilst international reporting has grown. Radio Rottu saw the strongest change, reducing its regional reporting to the current 15 minutes per day (2013: 42 minutes). Only Fiume Ticino produces even less regional information than the Upper Valais station. Operators in French-speaking Switzerland offer the most. Notably, the other Valais radio station Rhône FM occupies the top spot in all of Switzerland, offering its listeners 55 minutes of regional information a day during prime time on workdays.

When it comes to the **quality of the information editing**, differences between language regions and individual radio stations with a fee-splitting licence are less distinctive. Private radio stations with a fee-splitting licence make no major efforts in the formal diversity of information presentation. On the other hand, they rendered the **diversity of topics** required by their licences mostly with ease. As a rule, they cover a broad range of topics in politics, society, economy, culture and sport.

Radio stations in Romance-speaking Switzerland provide **orientation services** more often than Swiss German stations, which is largely linked to the discursive style of presentation that these stations practice, whilst Swiss German radio stations orient themselves more strongly to the factual.

Information provided by radio stations with a share of the licence fee is relatively **closely associated with public authorities**, i.e. political actors in state and administration are reported about much more often than those with a legislative function. This is even more the case in French-speaking Switzerland than in German-speaking Switzerland. Ticino stations report in even closer association with public authorities.

The performance mandate of private radio stations also contains a requirement of **comprehensive** journalistic coverage of the **licence territory**. Since the density of events is much higher in urban centres, especially cantonal capitals, than in peripheral communication areas, this requirement is a priori difficult to meet. The problem intensifies the more communication areas and/or cantons belong to a licence territory. The **BNJ Group** has therefore decided to broadcast three largely independent **full programmes** under its licence, which covers the cantons of Jura, Neuenburg and

the French section of the canton of Bern (Bernese Jura). In this way, it succeeds very well in meeting the requirement for comprehensive journalistic coverage of the licence territory.

In German-speaking and Italian-speaking Switzerland, individual licence territories are in part even more heterogeneous than in the Jura region. **Grischa** and Grischa Südbünden in particular have to offer journalistic coverage of a multilingual licence territory consisting of multiple communication areas. The majority of the affected communication areas were, however, not or hardly at all taken into account in those two programmes during the analysed artificial week – in contrast to the example of the Jura region.