

Summary:

**Television Programming by Private Broadcasters with a
Performance Mandate in Switzerland**

*Ongoing Program Research: Phase 6,
2015 Final Report*

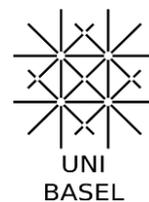
(Reporting period: 2014)

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1 2015 Summary of the Analysis of Private Broadcasters with a Performance Mandate in Switzerland (Reporting Period: 2014)

The 2015 Final Report and the present summary (which outlines the results of the Final Report) document the process and results of the sixth phase of the ongoing program research on television programming from private broadcasters with a performance mandate. This concludes the sixth year of research. This phase comprises data collected in the spring and autumn of 2014 due to a request by the Swiss Federal Office of Communications (OFCOM) for a transition to assessments for each calendar year.

2 Introduction and Methodology

2.1 Researched Programming

Radio and television broadcast licenses were awarded in 2008 based on a restructured coverage area. These included thirteen television licenses for the various broadcast areas in the country. As the name “broadcaster with a performance mandate” implies, the licenses require broadcasters to fulfill certain (programming) mandates. These can be divided into four areas:

- *Currency*: One program must be broadcast that is updated daily.
- *Topics*: Information about politics, the economy, culture, society, and sports must be provided.
- *Diversity*: A plurality of topics, opinions, and interests must be reflected and a broad spectrum of people and groups must have an opportunity to speak.
- *Regional focus*: Information, actors, and opinions must pertain to the broadcast area and reflect the entire broadcast area.

A research team from the University of Fribourg, Switzerland began researching the fourteen television program services of the thirteen private broadcasters with performance mandates in 2009. The objective of the program analysis was to describe the programming with respect to the four mandate areas named above. The thirteen private broadcasters with performance mandates that were analyzed are: Léman Bleu, La Télé, Canal 9/Kanal 9, Canal Alpha, TeleBärn, TeleBilingue, TeleBasel, Tele M1, Tele 1, Tele Top, Tele Ostschweiz (TVO), TeleSüdostschweiz (TSO), and TeleTicino. TeleZürich has also been included since 2010 as a non-licensed regional program service.

2.2 Sample Period

The team collected two random samples (spring and fall 2014) between 2:00 PM and 11:00 PM naturally occurring working calendar weeks (CW 15 and CW 44). These were recorded, archived, and analyzed. This modification of the sampling concept ensures that the results are no longer comparable with those of the previous year so that comparative interpretations must be foregone.

In each sample, the team investigated daily news, weather, economics, and sports broadcasts using a quantitative content analysis. Other daily updated, in-house or co-produced programming that may exist was described in detailed profiles using a qualitative content analysis. Based on the results of that qualitative content analysis during prior phases of this project, broadcasts that contain daily-updated information were identified. They were also researched in the quantitative content analysis starting from subsequent survey.

2.3 Research Concept

The tool used for measuring the broadcasts that may have daily updated content is based on the tool that has been used in continuous analysis of SRG programming. In order to check whether the performance mandate has been fulfilled, however, the tool was supplemented and adapted to the field of diversity of opinion and actors. The measurement tool consists of three modules:

First, the format or genre of a broadcast under review is determined in a broadcast analysis. In this process, production characteristics and broadcast rhythm are recorded in order to more precisely describe the formats. The broadcasts were categorized based on the same grid that is used in the SRG analysis. That way the structural-level data is comparable with the SRG programming.

The segment analysis divides broadcasts according to their thematic segments and records the topics that they address in detail. This maintains compatibility with the SRG study in terms of topic categorization based on the social relevance of the topical areas in order to ensure that the results on this level can be compared directly. Along with the topics, this step also measures, among other things, regional focus (on the municipal level), the actors who are given an opportunity to speak, and currency.

The segments on socially relevant topics from the fields of politics, economics, and society are then subjected to another opinion analysis in order to measure the diversity of the interests expressed and the actors' opinions.

In methodological terms, this is a quantitative, highly standardized set of content analysis tools based on a multi-dimensional, hierarchical codebook for broadcast, segment, and actor/opinion analyses.

The research tool for the profile analysis consists of a guideline that forms the basis for broadcast descriptions. Along with the production- and broadcast-related aspects, it records topics, currency, speaking actors, and regional focus. Both tools are documented in the final report.

Five bilingual students from the University of Basel executed the quantitative content analysis and the profile analysis. The coders received intensive training and performed extensive test coding. The coding was only started after the reliability values were adequately sampled out. The same team conducted the profile analysis in conjunction with a quantitative analysis.

3 Findings

3.1 Broadcast Analysis Results

One initial indicator of diverse programming that provides a population with regional information that is updated daily is the amount of time spent on current reporting in individual programs. On average, licensed broadcasters spend nearly four hours each non-holiday week or 47 minutes per workday on daily updated news. That is 47 minutes more time per week and some nine minutes more per day than the non-licensed broadcaster TeleZüri. But what initially appears to be a pleasantly high average grows out of a wide distribution of the channels' transmitting capacity: While CanalAlpha provides less than two hours of daily updated regional news per week or some 23 minutes per workday, the other French-language channels Léman Bleu and La Télé spend more than six hours weekly or over 70 minutes per day on broadcasts about current issues. The sole Italian-language offering from TeleTicino provided seven hours and 20 minutes per average workweek, which amounts to almost 90 minutes per workday.

3.2 Results for Licensing Standards

3.2.1 Diversity of Topics

One way that the diversity of a television broadcaster's content can be determined is by looking at the topical diversity that the license explicitly requires, while the following analysis also factors in the relevance framework of the individual topical areas. The fields of politics, economics, culture, society, and sports, which are particularly relevant from a social perspective, may represent significant sections of the daily regional reporting by broadcasters with a performance mandate. Licensed broadcasters spend an average of about 24% of their daily broadcast time on political topics. Culture, other social topics, and sports each take up approximately 15% of broadcast time while economic topics, at roughly 8%, take up relatively little broadcast time.

Topics that the license does not explicitly require and that might sooner be associated with the private relevance framework from a normative analytical perspective almost universally occupy less editorial space: At just under 9%, service and advice topics alone take up slightly more broadcast time than economic reporting. Reports on crime, accidents, and disasters (6%) and on celebrities, people, and emotions (just under 6%) make up a relatively small portion of all licensed programming on average. A comparison with the non-licensed TeleZüri shows that this purely commercial regional broadcaster sometimes dedicates significantly larger amounts of time to all three of these topical areas that are not explicitly required while giving less weight to sports and politics in particular. It remains for further analysis to show whether reporting conditions in the two sample weeks created this effect. A look at the results for the licensed Zürich broadcaster Tele Top ZH likewise shows a below average percentage of time at least for sports.

However, a review of the programming by the individual broadcasters shows clear weighting differences for distinct topical areas: The political share fluctuates, taking up between 16% (TVO) and over 40% (Tele M1) of daily updated broadcast time, although such detailed results must be handled carefully, particularly when interpreting, because individual events can have a strong influence on the outcome of only two samples. The TVO sample, for instance, includes a series of peculiarities due to the OFFA fair and a spectacular murder case in Liechtenstein in the spring of 2014. This explains why the proportionately largest amount of time was spent reporting on areas that are not obligatory under the license: Over 21% of reporting time on celebrities, people, and emotions and nearly 13% on crime, accidents, and disasters are comparatively high values that occasionally even exceed those of TeleZüri. Overall, licensed programming includes reporting on a broad range of daily updated topics whereby broadcasters sometimes appear to focus on different areas. Further analysis of subsequent samples may reveal a more stable image.

3.2.2 Regional Focus

If we look first at the proportions of the segments, on average nearly 85% of all segments in licensed programming as a whole have a direct regional focus. Tele M1 in particular (just under 58% of all segments) but also TeleBärn (roughly two segments of every three), TVO (70%), and TSO (78%) dedicate fewer segments than average to regional topics. Among programs with a relatively small degree of regional focus, Tele M1 and TeleBärn (25% and just under 18%, respectively) stand out with comparatively large proportions focusing on foreign matters. This puts them in the same range as non-licensed TeleZüri, which is particularly noteworthy given that the same company owns all three. They each have an editorial policy that includes a block for international news. Whether or not that is appropriate for regional television broadcasting with a (regional) performance mandate is a matter for the oversight authorities to decide. The fact that TeleZüri focuses on it likely indicates that news from abroad is regarded as attractive to viewers given that TeleZüri is the only one of these three broadcasters that must take audience share into consideration.

Where the proportion of time spent on foreign news is concerned, this point is qualified somewhat by the fact that the international news blocks broadcast by the two licensed AZ Medien programs are usually dominated by brief news reports. If we take this into account, the proportion of reporting time that TeleBärn and Tele M1 dedicate to news from abroad is approximately 13%. Telebasel and Léman Bleu (nearly 21% and just under 18%, respectively) dedicate significantly larger proportions of time to foreign matters. However, the licensing areas for both them have a very strong focus on neighboring countries, which cannot be assumed at least for the TeleBärn region given that it does not have a direct foreign border. If we add as evidence the proportions of regional reporting that focuses on the license area, it becomes clear that, while Léman Bleu and Telebasel reach ca. 97%, TeleBärn and Tele M1 spend less than 80% of their reporting time on daily updated information about their own license areas. Whether or not the regional focus at AZ Medien will decline further due to programming cooperation remains to be seen, particularly given

the evidence from TeleZürich's acquisition of talk show *TalkTäglich*. TVO falls short of these figures: Its programming showed the lowest degree of regional focus due to reporting on the OFFA fair and the murder case in neighboring Liechtenstein.

3.2.3 Currency

The study also analyzes the actual currency of the programming, explicitly answering one of the five Ws: When? The answer for some 83% of all segments in all licensed programming is potentially daily. Consequently, licensed programming is slightly less current on average than TeleZürich. However, all programs have a relatively large portion of segments with unclear currency, i.e., without any discernible occasion for their reporting: on average, nearly 17% of all licensed programming and even 26% on TeleZürich. If we look at the proportion of segments in daily broadcasts that are definitively not current to the day, then Canal 9 (34%), Canal Alpha (33%), and Léman Bleu (nearly 27%) stand out for their non-current reporting.

Daily updated reporting is given a slightly smaller share of broadcast time: On average, 77% of daily updated licensed-programming broadcast time is taken up with potentially daily updated reporting. For TeleZürich, the portion of broadcast time is almost identical to the number of reports. Only a few licensed broadcasters come close to the currency ratios of the non-licensed programs; TeleBärn, Tele M1, and La Télé exceed TeleZürich's 86% with 90% of their broadcast time. If we look at the shares that can safely be regarded as not up-to-date, the values for licensed programs are greater than the segment ratios. This means that there are apparently more long segments that are not updated daily. This can be explained by the random sampling: Mandated potentially up-to-date broadcasts are included in the sample in full if the broadcasts have just one day-to-day event in at least one segment. So if, for example, a talk show was current for that date, thereafter it is always part of the sample presented here, which may result in the inclusion of large proportions of non-current reporting.

3.2.4 Actors and Diversity of Opinion

There is no mandate to analyze diversity of opinion in reporting in great detail: There is only one figure on the proportion of reporting on political, economic, and social topics in which none, one, or more than one and then opposing opinions of external speakers occur. Altogether, approximately two thirds of the reporting on licensed programming on these topics exhibits no cited opinions at all, indicating a strong orientation toward neutrality in Swiss regional television. Francophone programming in particular is rather opinionated: Opinions are cited in every other segment on Léman Bleu and even opposing opinions are aired in 14% of the segments. Surprisingly, TeleTicino is particularly short on opinion and the only broadcaster without opposing opinions in its socially relevant reporting. But from a journalistic perspective, news does not constitute the core format of exchanges of opinion.

Looking at the social context of the speaker expressing an opinion, it is apparent that the socially relevant fields of politics, economics, society, and culture in particular combine to form very large portions. However, the average values, for example, of 27% of politicians and members of administrations who are allowed to express opinions about politics, economics, and society come about through very different proportions in the individual programs: The values fluctuate between just under 10% for TeleBilingue and nearly 45% for Léman Bleu. The proportion of private persons who are given editorial space to address socially relevant topics has a similarly large fluctuation range: While only one speaker on TeleTicino is a private person (which amounts to only just under 4% of the total speakers), nearly 45% of all speakers who express opinions on Telebasel come from private life. This Northwest Swiss broadcaster therefore broadcasts a larger proportion of private persons' opinions than the non-licensed TeleZürich. The license has no specific standards for diversity in speakers' opinions. However, the information available does not indicate whether the almost half of all people offering opinions are private individuals who were

presumably surveyed on specific topics in roving camera interviews and not predominantly political representatives. At least such a heavy weighting toward private persons certainly indicates a broadcaster's affinity for the target audience.

4 Results of the Qualitative Analysis

In all, 79 broadcasts were researched for each edition. That is 15% fewer than the previous year. With the exception of the francophone broadcasts, the programming appears to be stabilizing slowly; the number of new broadcasts is decreasing sharply.

A profile for each broadcaster shows between zero and three broadcasts (TVO: no broadcasts in the spring or the fall; Tele1: one broadcast per sample; TSO: one broadcast in the spring and two in the fall) or up to nine broadcasts (TeleBasel: six broadcasts in the fall and three in the spring). When the broadcasts (primarily talk shows) from the first survey round are included in the qualitative analysis, an expanded portrait of the broadcast formats takes shape: There are more news stories, commentary, documentary reports, and magazine shows, which appears to broaden the structural diversity of the programming.

Overall, the broadcasts cover a broad range of topics and frequently have a regional focus. All measurable currency levels (daily, weekly, and non-daily) are present. However, daily updated broadcasts could only be identified in a broader sense.

5 Conclusion

The research shows that regional broadcasters with a performance mandate are in a (constant) state of transition even as the programming is slowly stabilizing: In individual cases, greater fee support leads to expansion and is beneficial for content development, or at least for maintaining broadcast operations. The content also appears to adhere more closely to the performance mandate and place greater emphasis on the required content. For instance, the broadcasters do not include less current news content.

6 Publications

The Basel/Fribourg research group submitted an initial survey of the regional broadcasters with a performance mandate to Rügger Verlag in 2011. The results of the first four years of research were published in table form on the OFCOM website. The results of the first seven samples were also published as a book by Rügger Verlag in 2013.