

## **Programmes of Swiss private radio operators with a performance mandate – 2016**

### **Summary**

The 2016 programme analysis of private commercial radio operators took into account all licensed Swiss operators, amounting to 37 programmes.

In 2016, the Swiss private radio sector was again characterised by great diversity. French-speaking Switzerland's private radio stations better meet media politics targets than the country's other radio stations. Overall, the former contain more information and broadcast more regionally-based information than most stations in German-speaking and Italian-speaking Switzerland. This lead taken by French-speaking Switzerland has even increased in comparison to 2013, as radio stations in German-speaking Switzerland and Ticino reduced their share of informational airings.

#### **Key methodical declarations**

##### **The following programmes were scrutinized in 2016:**

German-speaking Switzerland: Radio BeO, Canal 3 (German programme), RadioFR (German programme), Radio Südostschweiz, Radio Munot, Neo 1, Radio Rottu Oberwallis, Radio 24, Bern 1, Basilisk, Energy Zürich, Energy Basel, Energy Bern, Argovia, Radio 32,

Radio 1, Radio Zürisee, Planet 105, Radio Top, FM1, Radio Central, Radio Pilatus, Radio Sunshine

French-speaking Switzerland: RJB, RFJ, RTN, Canal 3 (French programme), Radio Chablais, RadioFR (French programme), Rhône FM, LfM, Rouge FM, One FM, Yes FM, GRRIF

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

Sample: An artificial week (business days) in the period from 17 March to 28 November 2016

Sample dates: Mon, 28 November, Thu, 23 August, Wed, 11 May, Thu, 17 March, Fri, 14 October

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

Music analysis: Wednesday, 11 May; 5.00 AM to 7.00 PM

Total programme hours analysed: 1628h

#### **Programming concepts: major differences between the different language regions and broadcasters**

The Swiss private radio stations each operate within structurally highly divergent territories, shaped by particular economic forces. This context strongly determines the general orientation of a radio station, merging with the fundamental programme philosophy principles of the operators and the statutory performance mandate, as well as, above all, taking into account the regional competitive environment.

Given these differing conditions, it is hardly surprising that there are far fewer similarities between the private radio programmes than there are differences. Still, it can be generally stated

than half the programmes aired during prime time involve music, predominantly from within the pop genre. The news and other informational content presented by the private radio stations is mostly restricted to the bare facts readily available, with little contextual embedment and announced in a fairly simple manner. However, even these few similarities do not apply to all programmes. Three radio stations in French-speaking Switzerland (RFJ, RadioFR – French programme, Chablais) display more verbal than musical content. GRRIF and Planet 105 give preference to other genres over pop, and RadioFR (German programme) as well as Radio 1 do offer their news-listeners notable levels of context and orientation. The main conclusion remains the same: the private-radio landscape in Switzerland is decidedly diverse.

Where multiple private radio stations are in direct competition programmatic differences are based on differing target group orientations. The radio stations most commonly segment their listeners by age, e.g. in the Basel and Bern areas. Providers in the Greater Zurich area also address their respective age groups by means of specific music formats and informational concepts. This method of segmentation also prevails in the Lake Geneva region and central Switzerland, yet not in Ticino. Essentially, the single difference between both scrutinized programmes in Italian-speaking Switzerland is the higher amount of (regionally-based) information in the programmes aired by 3i. Both stations' music formats, however, are virtually identical.

There are some striking differences between the three language regions: private radio programmes in French-speaking Switzerland and Ticino involve much more conversational elements than those in German-speaking Switzerland. For French-speaking Switzerland, this is mainly attributable to its culture of extensive informational content, while Ticino radio programmes involve a disproportionately higher amount of presentation and advertising. This appears to be the result of a particular radio culture that makes a lot of room for the spoken word.

### **Programme dynamics: constantly striving for success**

Private radio stations are constantly pressed to optimize their success rates against the backdrop of ever increasing competition, the changing (needs of the) audience, and innovative programme formats. Some broadcasts have undergone radical transformations as a result.

For example, Rhône FM has made a number of changes to its roster since the last full survey in 2013. The most obvious is the music format, favouring tracks which appeal to a much younger audience while also selecting more international hits that are often played several times a day. The flip side of this is a slight reduction in regional information. In the Lake Geneva region, LFM and One FM have further refined their profile: LFM has expanded its informational segments and regional information as well as it has changed its music selection. These measures help it appeal to an older audience, aligning LFM's programmes even better with One FM than in 2013.

In Italian-speaking Switzerland, the two private radio stations were positioned very differently in terms of music in 2013, with Fiume clearly aiming at a younger crowd than 3i. This difference has practically vanished three years later. The two programmes are now very similar when it comes to musical genres. 3i has rejuvenated its formats, while Fiume has adjusted its mix of musical styles.

In German-speaking Switzerland, the most noticeable changes have taken place at Radio Rottu and Central. In comparison to 2013, Rottu has simultaneously significantly increased the amount of music and almost halved its informational offerings; the reduction in regional news is even more profound. Rottu has also made significant changes to its genre roster: the station now focuses mainly on international evergreens, with fewer current top-listed tracks, and has also significantly reduced the amount of Swiss music in its mix. – While Central has also substantially cut back on the amount of (regionally-based) information it airs, this station still remains far above the average for German-speaking Switzerland. The repositioning of Central is most obvious in its music choices, which have been tailored to appeal to an older audience. There is a clearly audible intention to differentiate Central musically from the other radio stations within its company group (Sunshine) to reach optimal complementarity. A similar kind of differentiation was also observable in the Greater Bern area: Bern 1 has positioned itself to aim towards a slightly older audience while also expanding its regionally focussed information production, making itself more distinct from its direct competitor Energy Bern.

### **Decline in regional information in German-speaking Switzerland and Ticino**

A licence obliges operators to provide certain informational services during prime time. Although this obligation applies to all operators holding a licence<sup>1</sup> the extent to which it is implemented varies widely: the station that broadcasts the most information (RFJ) produces more than four times the amount of informational content than do those with the least amount of information (Fiume Ticino, GRRIF, FM 1, Energy Bern, Energy Basel). There is a striking difference between the private radio stations in French-speaking Switzerland versus the other language regions. On average, radio stations in French-speaking Switzerland devote more than a fifth of their airtime time to informational content; the same figure only reaches 12% in Ticino and 13% in German-speaking Switzerland – a finding that seems to indicate a trend dating back to 2013.

The performance differences are even more pronounced when it comes to information addressing the area covered by the licence. Private radio stations in French-speaking Switzerland offer their audience on average roughly twice as much locally based information as the radio stations in both other language regions. At 53 minutes a day, RFJ occupies the top rung over all Swiss radio stations. GRRIF, which also operates in the region of Jura, and FM 1 in Eastern

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<sup>1</sup> There is one exception: Planet 105 holds a special licence.

Switzerland fall to the other end of the spectrum (with a mere 5 minutes daily each). The private radio stations in French-speaking Switzerland have maintained the high volume of their services since 2013, while those in the rest of the country have scaled back.

16 Swiss private radio stations receive a share of the nationally collected licence fees as compensation for structural disadvantages. This additional funding apparently has a positive impact in terms of the stations meeting their licence's requirements: radio stations with a fee-splitting licence on average devote a fifth of their prime time airings to informational content – the figure only being slightly more than half of that (12%) for the other private radio stations. The correlation of funding through licence fees increasing informational output is even stronger if you look at regionally-based information. This type of content generates higher editorial costs than national and international news which can be purchased relatively cheaply from agencies or correspondent networks. Radio stations with a fee-splitting licence averagely broadcast 35 minutes of regional information during prime time on a work day, while licensed private radio stations without public funding broadcast an average of only 14 minutes.

When it comes to the quality of editing the information, differences between language regions with their respective radio stations are less clear. Demanding presentational formats are generally rarely used in private radio programmes. Some stations, such as Radio 1 in German-speaking Switzerland and RFJ in French-speaking Switzerland, have nonetheless succeeded in presenting information in a variety of formats. However, all private radio stations do meet the required diversity of topics. As a rule, they cover a broad range of topics in politics, society, economy, culture and sport. Some stations will even take a partisan stance on certain subjects. In general, politics and social topics are the main priority and account for around half of the amount of informational broadcast. They have remained in this top position since 2013.

Private radio stations in French- and Italian-speaking Switzerland provide orientational services more often than their German-speaking counterparts. The relevant figures are far above average for RadioFR (French programme), which frequently airs controversial perspectives and opinions, particularly in its interviews and studio debates. Canal 3 (French programme), RFJ, and Chablais, plus Radio 1 in German-speaking Switzerland, offer above-average orientational services to their audience as well.

One condition of the licences is that the news and other informational formats provided by radio stations take into account the entirety of the area covered by the licence. Since the occurrence of noteworthy events is much higher in urban centres, first and foremost the cantonal capitals, than in peripheral cantonal areas the requirement of a regionally balanced coverage is a priori difficult to meet. Hence, strictly speaking a great number of Swiss private radio stations are running up a deficit in terms of equal journalistic coverage of their area covered by the licence. The focus on urban and political centres means that many Swiss regions barely become a part at all of the

journalistic reality established by private radio stations. This does not only concern peripheral and sparsely populated areas where newsworthy events rarely take place. Some densely populated areas within the area covered by the licence of multiple private radio stations are affected just as well: these "blind spots", some of which were already identified in previous surveys, include Freiamt, Fricktal, Glarnerland and La Broye. Zürcher Oberland is a new addition to this list: it is one of the most densely populated regions in Switzerland and even sits within the intersection of multiple private radio stations. Yet, it is barely covered at all.