

## Swiss private radio stations with a performance mandate – 2018

### Summary

The 2018 programme analysis of private commercial radio operators took into account all licensed operators, amounting to 37 stations.

In 2018, the Swiss private radio sector was again characterised by great diversity, although the current trend points to a decline in such diversity. French-speaking Switzerland's private radio stations better meet media policy targets than the radio stations in the other language regions. The French-speaking stations generally provide more regionally-based information than most stations in German-speaking and Italian-speaking Switzerland.

#### Key methodology data

##### The following channels were examined in 2018:

German-speaking Switzerland: BeO, Canal 3 (d), RadioFr (d), Südostschweiz (RSO), Munot, Neo 1, Rottu Oberwallis, Radio 24\*, Bern 1, Basilisk, Energy Zürich, Energy Basel, Energy Bern, Argovia\*, Radio 32, Radio 1, Zürisee, Planet 105, Top, FM 1\*, Central, Pilatus\*, Sunshine

French-speaking Switzerland: RJB, RFJ, RTN, Canal 3 (f), Radio Chablais, RadioFr (f), Rhône FM, LfM, Rouge FM\*, One FM, Radio Lac, GRRIF

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

Sample: An artificial week (Mon-Sun) in the period from 8 January to 9 December 2018

Sample dates: Mon, 30 April, Tue, 27 November, Wed, 27 June, Thu, 18 January, Fri, 24 August, Sat, 20 October\*\*, Sun, 11 March\*\*

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

Music and programming structure analysis: Wednesday, 27 June; 5.00 AM-midnight

Total programme hours analysed: 2,257

\* Has no longer had a performance mandate to fulfil since mid-2018

\*\* Sat/Sun are not license-relevant; the summary only takes business days into account

### Programming concepts: reflection of the cultural and political diversity of Switzerland

The Swiss private radio stations operate under very different economic and structural conditions. This economic and structural context, along with the programme philosophy principles of the operators and, above all, the regional competitive environment, determines the general orientation of a radio station. There are therefore many more **differences** between the radio stations than there are similarities. As a result, the key conclusion to be drawn is that the private radio landscape in Switzerland is extremely diverse and, as such, reflects the cultural and political diversity of Switzerland.

One of the few similarities between the private radio stations involves the fact that, in most cases, more than half the content of the programmes aired during prime time consists of **music**. However, Radio Lac, which broadcasts more spoken content than virtually all SRG stations, is the

exception to this rule. Another similarity between the private radio stations is that their music formats are generally **mainstream** pop. However, this rule also has an exception in the form of **GRRIF**, which operates in the Jura region and offers an extremely diverse range of music styles, combining old and new songs to create an independent format. Although **BeO** also focuses predominantly on pop music, it continues to feature Swiss folk music as well, which can otherwise only be heard on niche stations.

Most private radio stations are also similar in that their **information** content is generally restricted to bare facts with little contextual background, whereby information is presented in a fairly simple manner. This is true of the majority of the stations analysed, but here again there are exceptions – for example, **Lac** and **Chablais** in French-speaking Switzerland and **Radio 1** in German-speaking Switzerland provide audiences with a variety of formal information offering a solid level of orientation.

#### **Differences on Lake Geneva – homogenisation in Ticino**

Programmatic differences can result from the different **target group orientations** or **geographical** focus of the various stations, for example. In areas where at least two private radio stations are in competition with one another, listeners are commonly segmented by age. A good example here is offered by the Basel and Bern areas. Stations in the Greater Zurich area, the Lake Geneva region and Central Switzerland also address different age groups by means of specific music formats and informational concepts. Certain stations also focus on geographical areas as a supplement or alternative to their normal programming. Radio 1, for example, limits its regional reporting to Zurich as the urban centre of its coverage area, while Lac and One FM focus on the Geneva region.

The reasons for programming adjustments and **repositioning** can include increased competitive pressure, changing audience preferences, changes to programming concepts made by direct competitors and business and financial considerations. Such developments have been observed at various stations since 2016. The most notable of these was the radical transformation of the former Yes FM into **Radio Lac** – a station that was set up to complement the other stations (One FM and LFM) in the company group.

Conditions in **German-speaking Switzerland** are quite stable in comparison to previous surveys. A rather conspicuous development has been observed at **Radio Südostschweiz**, which has radically turned its music format towards a younger target audience. This station's music format is now nearly identical to that of its adjacent station, FM 1. The music formats used by Planet 105 and Energy Zürich in the Zurich area have also become more similar. Dynamic programme developments relating to information content have been less apparent – Argovia, Pilatus and, in particular, **BeO** have reduced the amount of information they air since 2016. In the case of **Argovia**, this

particularly applies to regional information. It's also become clear that the three "Energy" stations have reduced the amount of political information they provide to largely the same degree.

The two private radio stations in **Italian-speaking Switzerland** have become very similar in terms of their music formats since 2013, whereas before that the formats very much complemented one another. This homogenisation process has continued and now also affects information content. Since 2016, Radio 3i has sharply scaled back its information content, while Fiume Ticino has expanded it somewhat. As a result, two private radio stations with virtually **identical** programming concepts now coexist in Ticino.

As this example in Ticino shows, the diversity of the private radio landscape is being repeatedly called into question in some cases. When viewed over the long term, alternating homogenisation and differentiation trends can be observed. The differentiation trend became stronger in 2009, but in recent years the trend has moved increasingly towards a **programming alignment**. Such a tendency towards uniformity can be observed, on the one hand, among radio stations belonging to the same company group. However, as the situation in Italian-speaking Switzerland shows, this phenomenon has also occurred among radio stations that compete with one another.

### **Regional information: increasing differences between French-speaking Switzerland and the rest of the country**

A licence obliges operators to provide certain **informational services** during prime time. Although this obligation applies to all operators holding a licence (with the exception of Planet 105), the extent to which it is met varies greatly – the station that broadcasts the most information (Lac) produces nearly seven times as much informational content as those stations with the least amount of information (FM 1, Rouge FM). There is also a striking difference between the private radio stations in French-speaking Switzerland versus the other language regions. The average private radio station in French-speaking Switzerland devotes nearly 25% of its airtime in prime time to informational content, while the corresponding figures are much lower in German-speaking Switzerland (14%) and Ticino (10%).

The **performance differences** are even more pronounced when it comes to **regional information**. Private radio stations in French-speaking Switzerland offer their audience on average more than twice as much locally based information as the radio stations in the other language regions. At 76 minutes a day, Radio Lac occupies the top rung over all Swiss radio stations, by far. GRRIF, Rouge FM and FM 1 (5 minutes each), and Argovia and Radio 24 (7 minutes each) fall to the other end of the spectrum. Developments have varied among the language regions since 2016. Regional information production has expanded further in French-speaking Switzerland and declined in German-speaking Switzerland – and especially in Italian-speaking Switzerland.

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**, although this positive impact is declining. For example, radio stations with a fee-splitting licence on average devote more than a fifth of their prime time content to the provision of information, while the figure for the other private radio stations is only 14%. The correlation between funding through licence fees and increasing informational output is even stronger in the case of **regional information**, which tends to generate higher editorial costs than national and international news which can be purchased relatively cheaply. Radio stations with a fee-splitting licence broadcast an average of 28 minutes of regional information during prime time on a work day, while licensed private radio stations without public funding broadcast an average of only 15 minutes. Compared to the previous survey, **radio stations with a fee-splitting licence** have **reduced** the average amount of regional information they offer by seven minutes, with Canal 3 (f), Rhône FM and RadioFr (f) in particular recording a sharp decline in the amount of regional information provided.

When it comes to the **quality of the presentation of information**, differences between language regions and the various radio stations are less clear. With few exceptions, the private radio stations do not excel at offering sophisticated presentation formats, contextualising news reports or illuminating different points of view and opinions. On the other hand, they succeed very well when it comes to presenting a **diverse range of topics**. As a rule, they cover a broad range of topics, although some stations focus on specific areas. For example, the **Energy-Stations** and **GRRIF** report relatively rarely on politics and tend to focus instead on culture (mainly music) and society and sport (Energy).

In accordance with their performance mandate, private radio stations are to provide news and information on the entirety of the **area covered by their licence**. The ability to meet this requirement depends largely on the structure of the area in question. For example, homogeneous areas make it easier to meet the requirement, while heterogeneous areas make it more difficult. Also to be taken into account is the fact that the occurrence of noteworthy events is much higher in urban centres (first and foremost in the cantonal capitals) than in peripheral cantonal areas. Broad and focused **journalistic coverage** of the respective licence area is achieved, for example, by Mu-not, Radio Rottu, RadioFr, Bern 1, Radio 32, Neo1, Canal 3 and, in particular the BNJ stations (RFJ, RJB, RTN) and LFM. Top, Zürisee and Central also offer broad coverage in what are extremely heterogeneous licence areas.

Other Swiss private radio stations are running up great **deficits** in terms of journalistic coverage of their licence area. With the exception of LFM, the radio stations around **Lake Geneva** focus on sub-regions of the area covered by their licence. The focus on an urban centre is particularly pronounced in the Zurich **region**, where regional information provided by Radio 1 and Energy focuses almost exclusively on the city of Zurich and the immediate surrounding area.

Such a 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. The number of these “**blind spots**”, which were already identified in previous surveys, has, however, declined since the last survey in 2016. Still, **Willisau/Sursee**, **Freiamt** and **La Broye** continue to be largely ignored.