

## Programming of Swiss private radio stations with performance mandate – 2022

### Summary

The 2022 analysis of programming of the private commercial radio broadcasters considered a total of 37 stations, including 25 with a broadcasting licence and performance mandate. Since the start of 2020, licence-holders have been required to broadcast at least 30 minutes of relevant regional information in prime-time slots on weekdays. 21 stations – eleven from German-speaking Switzerland, eight from French-speaking Switzerland and two from Ticino – fulfilled this statutory requirement in 2022. Two stations from German-speaking Switzerland and two from French-speaking Switzerland broadcast less than 30 minutes of relevant regional information.

#### Key methodological data

##### The following stations' programming was analysed in 2022:

Licence-holders: *Canal 3 (d)*, *neo1*, *RadioFr. (d)*, Radio 1, Radio Basilisk, *Radio BeO*, Radio Central, *Radio Munot*, *Radio Südostschweiz*, Radio Top, Radio Zürisee, *rro*, Sunshine Radio, *Canal 3 (f)*, GRRIF, LFM, *RadioFr. (f)*, *Radio Chablais*, Radio Lac, *RFJ*, *Rhône FM*, *RJB*, *RTN*, *Radio 3i*, *Radio Ticino*

Broadcasters subject to the obligation to register, who returned their license: Bern 1, Energy Basel, Energy Bern, Energy Zürich, FM 1, Pilatus, Radio 24, Radio 32, Radio Argovia, One FM, Rouge FM, 20 Minuten Radio

*In italics: Broadcasters with fee-splitting rights*

##### Sampling period:

Based on an artificial one-week period (Mon-Sun) between 1 January and 31 December 2022

Dates sampled: Mon 7 November; Tues 29 March; Wed 26 January; Thur 3 November; Fri 15 July, Sat 14 May\*; Sun 11 September\*

Broadcasting times analysed: 06.00 - 09.15; 11.30 - 13.30; 16.00 - 19.15 daily

Analysis of music: Wed 9 September; 06.00 - 20.00

Total hours of programming analysed: 2,719.5

\* Sat/Sun are not relevant for the licence; the summary includes only weekdays

The analysis of programming provided by private commercial radio broadcasters in Switzerland considered content broadcast during prime time over an artificial one-week period (Mon-Sun) made up of randomly selected sampling days between January and December 2022. It investigated to what extent the broadcasters holding licenses fulfilled the statutory **minimum content requirements of 30 minutes** of relevant regional information on weekdays. Since 2020, a further five stations (the three Energy stations, Bern 1 and Radio 32) have returned their broadcasting licences, whereby there are still 25 stations subject to the minimum content requirements. The

2022 annual report also presents programme characteristics on the weekend and, as a control group, the services of stations not holding licenses.

### **Programming patterns: Variety and consistency despite trends towards convergence**

The operations of the licensed Swiss private radio stations are subject to a variety of economic and structural requirements. The linguistic and cultural context, relevant competitive situation, the broadcasters' programming philosophies and regulatory requirements influence the programming direction of a radio station. There are in part substantive **differences** between radio stations, and in other cases notable **commonalities**. Even if some characteristics display a high degree of **consistency** over time, certain **convergences** are clear. Overall, the Swiss private radio scene remained highly varied, reflecting the cultural and political diversity of the country.

A common factor across all licensed private radio stations was the high proportion of **music** in their output. All prime time programmes on weekdays consist largely of music, 65% on average. A station operating in the Jura region, **GRRIF**, broadcast the largest proportion of music (82%), whereas the figure for Radio 3i is only 51%. It is striking that the many stations offered a very **similar mix of styles**. For all stations with the exception of GRRIF, **pop** was the dominant style, representing two thirds of the musical content. Radio stations belonging to the same corporate group (e.g. three of the four BNJ stations) were also close. Compared to the previous study in 2020, there was overall little change in the mix of styles.

On average, the radio stations with a broadcasting licence and performance mandate reserved only about **17%** of their prime-time programming for **informational content**. The output of informational content was thus almost the same as in 2020. The output of informational content varied to a somewhat lesser extent than the music, between 26% for the French-language station **RadioFr.** and 10% for Radio Basilisk and GRRIF. The output of informational content in French- and Italian-speaking Switzerland (18%) was thus slightly higher than in German-speaking Switzerland (16%). The changes since the previous survey in **2020** were minimal, but tended to show **convergence** of the language regions. The average output of informational content for a license-holding radio station in 2022 was about 1 hour and 28 minutes per weekday – thus almost the same as in the previous study in 2020.

The largest portion (92%) of the information concerned **relevant topics** as per the Charter, ranging from 86% (Radio Ticino) to 97% (GRRIF). Large differences between the stations also existed with regard to the **mix of topics**; 18 of the 25 broadcasters focus on politics, to which on average nearly one third (32%) of the information volume was dedicated. A second area of focus was **social matters** (22%), which was the strongest focus in the variety of topics for five stations. The degree to which sport and business matters were covered was heterogeneous. Compared to the previous survey in **2020**, there was a clear trend in the variety of topics towards society and bad news, as well as **politics** and **sport**.

### Geographical coverage: a stronger focus on regional events

Programming differences resulted from the different audiences targeted by broadcasters or their **geographical focus areas**. On average, the 25 private radio stations with a broadcasting licence devoted 54% of the time they scheduled for information to events within their **coverage area**. A total of 16 stations placed their information focus on their own region, whereby more than half of their information activity addressed regional events. However, the specific proportions varied greatly. The leader here was **rro**, with a high three quarters of the events covered occurring within the local region. In contrast, only a third of the informational content covered on LFM had its origins in events within the broadcaster's coverage area. When the language regions were compared, the German-speaking stations focused 56% on events in the coverage area, while the proportions were 52% in French-speaking Switzerland and 48% in Ticino.

**Compared to 2020**, the proportions of events in the coverage area increased by 7% on average. With regard to the duration of reporting on regional events, this represented an **increase of nearly 10 minutes per weekday**. It is notable here that primarily the German-language stations increased their **regional reporting** in the 2-year comparison – especially **rro** – although Radio BeO, Radio Zürisee and the German-language stations of RadioFr. and Canal 3 also made clear increases.

Apart from the regional focus, the 25 license radio stations dedicated on average 19% of their informational output to **national events** and 18% to international events.

### Two-thirds of stations with more than 30 minutes of regional information

In 2022, 25 private radio broadcasters were obliged to deliver at least **30 minutes of relevant regional information** during the defined 8.5 hours of prime time slots on weekdays. In concrete terms, they have to either report on events within their coverage area, outline the effects of a supra-regional event on their coverage area, or establish a local connection within an item of content (with 10% of such content counted as contributing to the minimum content requirements). The analysis of programming shows some **striking differences** between the various stations.

**RadioFr. (f)**, the station with the highest **output of informational content** of 132 minutes in prime time, produced two and a half times or so as much informational content as the two stations with the lowest output of informational content (GRRIF and Radio Basilisk, each with 49 minutes). Licensed radio stations broadcast an average 1 hour 25 minutes of informational content per day.

Differences were large regarding the output of regional information for **events in the coverage area**. **Radio Chablais**, which broadcast the most informational content from its licence area of all the licensed private radio stations, provided its audience more than four times as much information on events happening within its coverage area (70 minutes per weekday) as LFM (17

minutes). On average, 41 minutes (47%) daily of all informational content was related to events in the stations' local areas.

Content describing the **impact of wider events on the coverage area** made only a modest contribution to broadcasters' fulfilment of their minimum content requirements. Reports on national or international topics that established a connection with the coverage area constituted on average 3 minutes (3%) of the overall output of informational content broadcast by the licensed stations during prime time on weekdays. Even less of a role was played by content that had only an implicit **connection to the region**. Accordingly, in cases in which either the event concerned took place outside the region or in which no local connection was explicitly established, only around 10% of the output of informational content broadcast on weekdays (barely 9 minutes) had a regional connection. As such content counts towards the minimum content requirements on a 10% pro-rata basis, it made an average contribution towards stations' minimum content requirements of only 54 seconds.

In 2022 **21 private radio stations** with a broadcasting licence **fulfilled** the statutory requirement of providing their public with the mandatory minimum of 30 minutes of regional information daily during the defined 8.5-hour prime time slots. This included eleven stations in German-speaking Switzerland, eight from French-speaking Switzerland and two from Ticino. Three West Switzerland stations, **Radio Chablais**, **Rhône FM** and **RadioFr. (f)**, as well as the German-language **rro**, exceeded this mark by more than double. **Four private radio stations** – all with performance mandate without fee-splitting rights – broadcast **less than 30 minutes** of relevant regional information daily during prime time on weekdays. The two German-language stations Radio Basiliak and Radio 1 were 2 to 3 minutes below the critical mark and the French-language stations GRRIF and Radio Lac missed the quantitative minimum content requirements for relevant regional information by more than 10 minutes.

The average duration of relevant regional information per weekday was **44 minutes and 45 seconds**, thus about a quarter of an hour above the minimum content requirements of the Charter. This average value was about 5 minutes higher than in the **previous study in 2020** (39 minutes 41 seconds). Eighteen of 25 licensed stations had improved with regard to regional information in 2022. In the lead was **rro**, with a clear increase of nearly 53 minutes, followed by RadioFr. (d), Radio Ticino and Radio BeO, which added 21 to 22 minutes. Seven radio stations produced in the 2-year comparison less relevant regional information, in particularly Radio Lac, where the drop since 2020 of 21 minutes was the largest (the minimum content requirements were however clearly exceeded at 42 minutes or so).