

## Programming of Swiss private radio stations with a mandate – 2020

### Summary

The analysis of programming provided by private commercial radio broadcasters in 2020 covers a total of 37 stations, including 31 with a broadcasting licence. Since the start of 2020, 30 licence-holders have been required to broadcast at least 30 minutes of relevant regional information every weekday. This statutory requirement was fulfilled during 2020 by ten stations within German-speaking Switzerland, nine in the French-speaking areas and one within Ticino. Ten private radio stations broadcast less than 30 minutes of relevant regional information, including eight stations in the German-speaking region.

#### Key methodological data

##### The following stations' programming was analysed in 2020:

Licence-holders: *Canal 3 (d)*, Energy Basel, Energy Bern, Energy Zürich, *neo1*, *RadioFr. (d)*, Radio 1, Radio 32, Radio Basilisk, *Radio BeO*, Bern 1, Radio Central, *Radio Munot*, *Radio Südostschweiz*, Radio Top, Radio ZÜRSEE, *rro*, Sunshine Radio, *Canal 3 (f)*, GRRIF, LFM, *RadioFr. (f)*, *Radio Chablais*, Radio Lac, *RFJ*, *Rhône FM*, *RJB*, *RTN*, *Radio 3i*, *Radio Ticino*, 20 Minuten Radio

Non-licensed broadcasters (i.e. subject to the obligation to notify): FM 1, Pilatus, Radio 24, Radio Argovia, One FM, Rouge FM

*In italics: Broadcasters with fee-splitting rights*

##### Sampling period:

Based on an artificially created one-week period (Mon-Sun) between 1 January and 31 December 2020

Dates sampled: Mon 11 May; Tues 7 April; Wed 9 September; Thurs 15 October; Fri 31 January; Sat 18 July\*; Sun 8 November\*

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

Analysis of music: Wednesday 9 September; 06.00 - 20.00

Total programming hours 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 considers content broadcast during prime time over an artificial created one-week period (Mon-Sun) made up of randomly selected sampling days between January and December 2020. The study reviews the degree to which commercial broadcasters holding a licence deliver the services required, particularly the statutory **minimum provision of 30 minutes** of relevant regional information on weekdays. The 2020 annual report also details the characteristics of the station's output on weekends and the services offered by the non-licensed stations.

### **Programming patterns: diversity despite a trend towards convergence**

The operations of the licensed Swiss private radio stations are subject to a variety of economic and structural requirements. The focus of a particular station's output is influenced by its context, the broadcaster's philosophy as regards programming, the regulatory requirements involved and, in particular, its competitive situation. While, then, the **differences** between the stations are in some ways larger than the similarities, a trend towards **convergence** is also evident in 2020. Overall, the world of private radio in Switzerland remains highly varied, reflecting the cultural and political diversity of the country.

A common factor across all licensed private radio stations is the high proportion of **music** in their output. Even during prime time on weekdays, more than half of almost all programming is devoted to music. A station operating in the Jura region, **GRRIF**, broadcasts the largest proportion of music (83%), whereas the figure for Radio 3i is only around 46%. It is striking that the many stations offer a very **similar mix of styles**. The output of broadcasters belonging to the same corporate group (Energy, BNJ) tends to be particularly similar. With the exception of GRRIF, **pop** is the predominant style across all stations' output, constituting a good two-thirds of the music broadcast. Very large differences between the licensed private radio stations in terms of the **age** of the music tracks played. At Energy Zürich, a full 93% of the tracks played are no more than ten years old, while such tracks make up only around 3% of the output of Radio 1, which is also based in Zurich.

On average, the stations with a broadcasting licence and mandate reserve only about **17%** of their prime-time programming time for **informational content**. Production of information-related content varies within a rather low range from 25% at **Radio Central** and **Rhône FM** to only 8% at Energy Basel. Overall, the proportion of informational content broadcast within **French-speaking Switzerland** is higher – at 19% – than in the Italian-speaking (17%) and German-speaking (15%) areas of the country. Nonetheless, in comparison with the previous survey conducted in 2018, there is evidence of a trend towards **convergence**, in that the quantity of informational content broadcast by licence-holders within German-speaking Switzerland has remained fairly stable but has fallen in the French-speaking areas and increased within Ticino. When considering this finding, it is worth remembering that, in 2018, the licensing system specified only a six-hour prime-time period. When licensing was extended in 2020, however, this was extended by 2.5 hours to 8.5 hours.

Despite the substantial differences in informational programming between different stations as regards the mixture of topics covered, broadcasters generally focus on two main areas: politics and social matters. **Politics** is the main issue covered by 18 of the 30 licensed private radio stations, most obviously at **Radio 1**, where 41% of all informational content is devoted to politics.

Eleven stations prioritise **social matters**, notably the German-speaking **Canal 3** with 39% and Radio Lac (36%). The degree to which cultural and business matters are covered varies greatly.

Relative to the 2018 survey, a striking shift from coverage of **sport-related to social** matters is in evidence. While the share of sport-related output has therefore declined, coverage of social issues has increased by a similar degree. This is perhaps unsurprising in view of the COVID-19 pandemic, which has dominated 2020, along with the long pause in sporting events and the significant social effects of the crisis.

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

Programming differences may well be due to the different audiences targeted by broadcasters or their **geographical focus areas**. On average, the 30 private radio stations with a broadcasting licence devote 46% of the time they schedule for information to events within their **coverage area**. However, the specific shares vary greatly between stations. Eleven broadcasters focus their informational coverage on their local region by devoting more than half of their news activities to regional occurrences. The leader here is **Radio Lac**, with 69% of the events covered occurring within the local region. In contrast, only a quarter of events covered on Radio 1 occur within the broadcaster's licence area.

The **French-speaking stations** give significantly more coverage to their own regions – with an average share of 54% – than stations in the German and Italian-speaking parts of the country (approx. 40% in each case). National events are given particular prominence in German-speaking areas. In contrast, the two Italian-speaking stations cover foreign affairs to a higher-than-average degree.

By way of comparison, the 30 licensed radio stations devote an average 28% of their information-related programming to **national events** and 19% to occurrences abroad.

**Relative to 2018**, the proportion of time given both to news from within the various stations' own coverage areas and to national events has tended to increase, at the expense of foreign affairs and events in the rest of Switzerland. This very much aligns with the broadcasters' programme service mandate. According to this, licensed local radio stations are meant to report on events predominantly within their local/regional area.

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

Since the broadcasting licences were extended on 1 January 2020, a total of 30 private radio broadcasters have been required to provide at least **30 minutes of relevant regional information** during the 8.5 hours of prime time 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 provision). The analysis of programming shows some **striking differences** between the various stations.

**Radio Central**, for example, the broadcaster with the largest **output of informational content**, devotes a good three times as much of its prime-time programming (130 minutes) to informational content as the broadcaster with lowest level of such content (Energy Basel with 42 minutes). Licensed radio stations broadcast an average 1 hour 25 minutes of information-related content per day. On average, a good 90% of this information-related output is devoted to **relevant topics** as defined in the licence agreement.

There are, however, also large differences regarding the provision of **regional information** for which the **location of the event** concerned lies within the coverage area. **Radio Chablais**, which broadcasts the most informational content from its licence area of all the licensed private radio stations, offers its audience more than five times as much coverage of events happening within its region (64 minutes per weekday) as Energy Basel (12 minutes). On average, 32 minutes (37%) of all information-related content is related to events in the stations' local areas.

Content describing the **impact of wider events on the coverage area** makes only a modest contribution to broadcasters' fulfilment of their minimum requirements. Items on national or international topics that establish a connection with the coverage area constitute an average 3.5 minutes of the overall information-related content broadcast by the licensed stations during prime time on weekdays. Even less of a role is played by content that has only an implicit **connection to the region**. Accordingly, in cases in which either the event concerned takes place outside the region or in which no local connection is explicitly established, only around 8% of the informational content broadcast on weekdays (barely 7 minutes) has a regional connection. As such content counts towards the minimum content requirements on a 10% pro-rata basis, it makes an average contribution towards stations' minimum content requirements of only 41 seconds.

In 2020, **20 private radio stations** with a broadcasting licence **offer** their audiences at least 30 minutes of regional information-related content per day during the specified 8.5-hour prime-time slots. These include ten stations in the German-speaking part of Switzerland, nine in the French-speaking areas and one in Ticino. Three broadcasters in the French-speaking areas, **Radio Chablais**, **Lac** and **Rhône FM**, each produce more than double the required content. **Radio Central**, the station broadcasting the largest amount of regional information within the German-speaking part of the country, produces almost 50 minutes of content.

**Ten private radio stations** – precisely one-third of the licensed broadcasters – offer **less than 30 minutes** of relevant regional information. Of these, ten are German-language stations, including

three in the Zurich area (Zürisee, Radio 1 und Energy Zürich), two based in Bern (Bern 1, Energy Bern), and Radio 32, rro and Energy Basel. The same applies to one radio station from the French-speaking region (GRRIF) and one from the Italian-speaking part of the country (Radio Ticino).