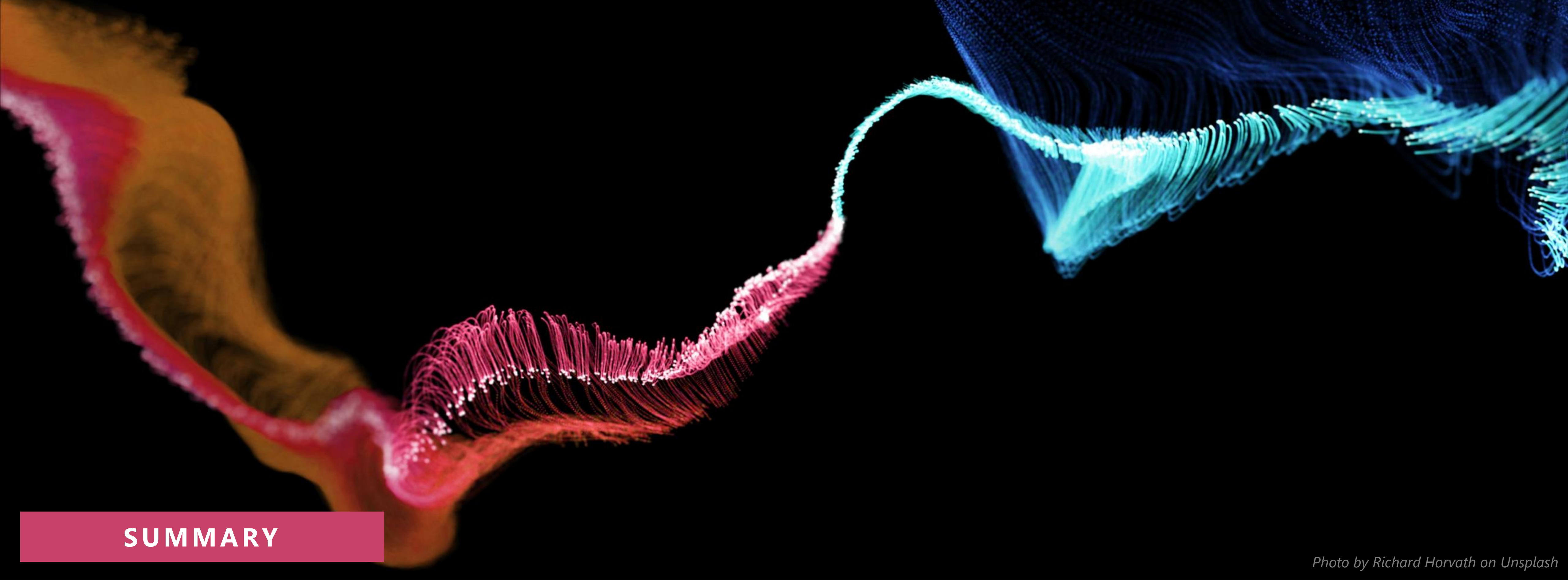


Photo by Richard Horvath on Unsplash

ONLINE MEDIA MONITORING 2021

ONLINE AUDIO AND VIDEO SERVICES IN SWITZERLAND

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

ON BEHALF OF: Bundesamt für Kommunikation BAKOM

GOLDMEDIA

KEY FACTS ONLINE AUDIO IN SWITZERLAND 2021

Source: Online media monitoring 2021

/01

ONLINE AUDIO PROVIDERS

In 2021, a total of 575 online audio services are being produced by 193 providers in Switzerland. The proportion of online-only radio services has increased to 39 percent. The online sub-brands of UKW/DAB+ stations remain the largest group on the total market.

/02

TOTAL MARKET DEVELOPMENT

Total advertising revenue of CHF 4.3 million was generated on the Swiss online audio market in 2020. This is predicted to be CHF 5.0 million in 2021. The market is forecast to expand by 13 percent annually until 2023.

/03

PODCAST USE

17 percent of Swiss internet users listen to podcasts at least occasionally. Relaxation and broadening horizons were stated as the main reasons. Interesting podcasts are primarily discovered via private and professional recommendations.

/04

ONLINE AUDIO USE

The COVID-19 pandemic has propelled the use of online audio in Switzerland: in total, 59 percent of Swiss internet users listened to radio/audio content via the internet in 2021. 48 percent said they listen to online audio more frequently due to the pandemic.

/05

PAID ONLINE AUDIO

In 2021, paid online audio services saw a significant rise in Switzerland compared to 2019: Half of Swiss internet users now use at least one paid service.

/06

OUTLOOK AND TRENDS

If a switch is made to DAB+ in Switzerland, 63 percent of providers would make more of a push towards online audio. Additional major topics for online audio according to providers in Switzerland are connected cars, 5G and podcasts.

KEY FACTS ONLINE VIDEO IN SWITZERLAND 2021

/01

ONLINE VIDEO PROVIDERS

In 2021, a total of 192 online video services were produced by 127 providers in Switzerland. The proportion of traditional media brands (TV, radio or print) has increased to 62 percent on the total market.

/02

TOTAL MARKET DEVELOPMENT

In 2020, total advertising revenue on the Swiss online video market was around CHF 160 million. Providers predict that this will increase by ten percent to CHF 176 million in 2021.

/03

TIKTOK

In the past year, TikTok has become more important for 22 percent of surveyed online video providers. On the consumer side, the social media platform plays an increasingly important role for 15 percent of Swiss internet users.

/04

ONLINE VIDEO USE

COVID-19 is also driving the use of online videos: in total, 58 percent of Swiss online TV/video content was streamed via the internet in 2021. 57 percent said they viewed online videos more frequently due to the pandemic.

/05

PAID ONLINE VIDEO USE

78 percent of Swiss internet users now use at least one paid TV or video streaming service. Half of all users have a subscription to Netflix, Amazon Prime Video and other services. 35% only watch on a free basis.

/06

OUTLOOK AND TRENDS

Interactions with the community and innovative formats continue to remain the key factors for developing the online video market in Switzerland in 2021, including improved internet at home and new telecommunications standards.

Source: Online media monitoring 2021

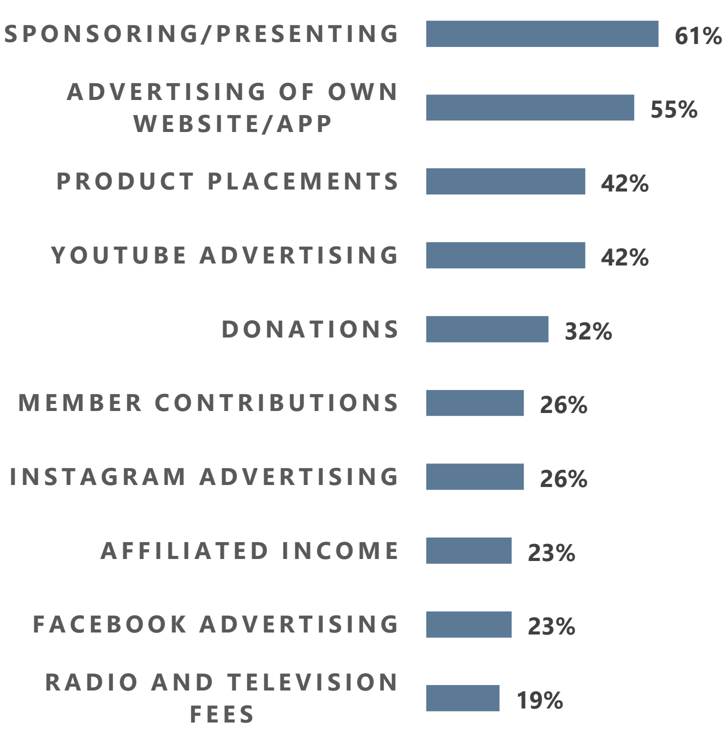
Q4

SOURCES OF REVENUE BY 2023

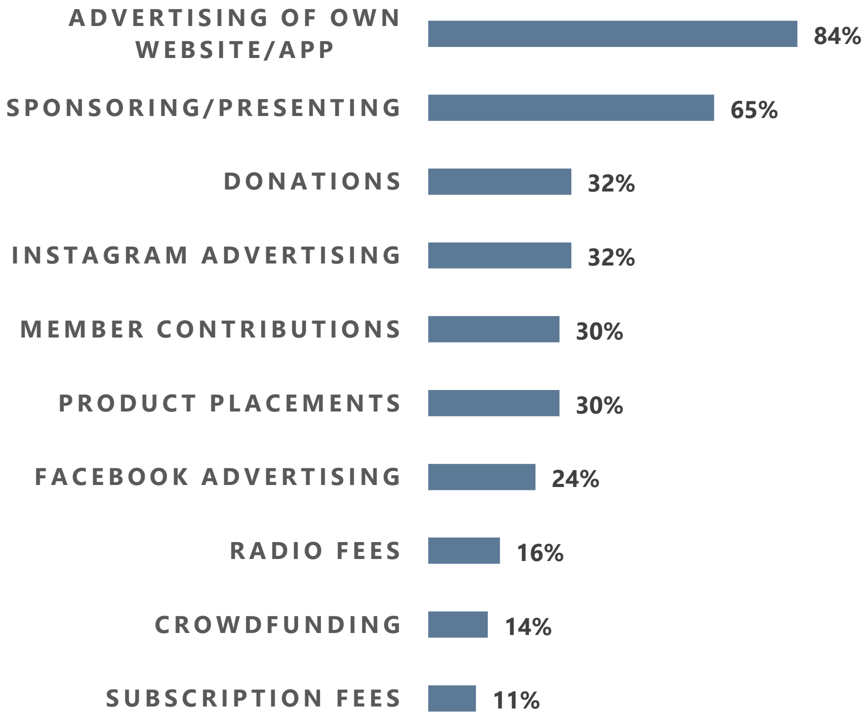
Sponsoring/Presenting and *advertising on own website* will continue to remain a key source of revenue for the next two years according to the online audio and video providers who were surveyed. Product placement and monetisation through YouTube are also becoming more important for video providers. In future, donations and Instagram advertising will become more important for the audio providers surveyed. Unlike video providers, advertising on own websites or apps is by far the most important factor.

Source: Online media monitoring 2021, n=31 video providers and n=37 audio providers. Question: In your opinion, which sources of revenue will become more important for your online services in the next two years, i.e. by 2023?

INCREASED IMPORTANCE OF SOURCES OF REVENUE BY 2023 FOR VIDEO PROVIDERS, TOP 10, IN PERCENT



INCREASED IMPORTANCE OF SOURCES OF REVENUE BY 2023 FOR AUDIO PROVIDERS, TOP 10, IN PERCENT



METHODICAL BACKGROUND

The online media monitoring 2021 conducted by order of OFCOM has the following different objectives: Firstly, the services and providers in the online media industry in Switzerland are recorded and quantified, and their economic data and potential is depicted. The survey also provides an overview of the demand for these online audio and video services as well as estimates and developments regarding particular hot topics.

To do this, the online media monitoring 2021 connected with the previous surveys carried out in 2017 and 2019 and recorded all of the relevant and active media providers in Switzerland using extensive structural data capture.

In a second step, a standardised online questionnaire was conducted between 18 May and 06 July 2021, to which all captured auditive and audiovisual online media were invited and in which they could provide their current development data and estimates about the online audio and video market in Switzerland.

As in 2019, the data of 1,000 online audio and video users and 500 non-users was collected in 2021 as part of online media monitoring. This involves a representative survey of Swiss internet users which was also carried out online between 06 and 27 July 2021, whereby participants were asked about their online audio and video behaviour and their motives and backgrounds.

Furthermore, the study is based on qualitative surveys among selected market players such as associations, providers, marketers and agencies, as well as a comprehensive evaluation of current secondary data and extensive desk research plus market forecasts.

DATABASE/POPULATION

All active services were recorded in the online media monitoring 2021, of which radio/online audio and private or licensed online video content is a central feature and provided linear or on demand (Exception: solely download stores in which music/films/videos can be purchased do not count), browser-based or retrieved via mobile app targeted towards a Swiss audience or providers based in Switzerland (compliance with legal standards required).

These include all online radio stations (Simulcast and online only), user-generated radios and podcast services with IP or app-based distribution (linear or on-demand) focussing on music and/or information as well as all active video services with IP or app-based distribution including YouTube channels.

The following services were recorded for the population of the online media monitoring 2021: 193 online audio providers with 575 online audio services as well as 127 online video providers (with own online presence) with 192 online video services. This corresponds to 320 streaming providers with 722 online audio and video services in total.

The number of providers who did not participate in the 2021 survey were 25 providers (no valid email address and/or telephone number). Thus, 295 online audio and video providers were invited to participate in the survey. 107 providers took part in total, which corresponds to a response rate of 36 percent (based on available providers).

Compared to the last study in 2019, providers with their own online presence and providers of YouTube channels were also considered when surveying online video providers. The population was identified as 3,350 YouTube channels with more than 500 subscribers in Switzerland (location information in the channel info) (Dated: 02/2021 of which 250 of the highest coverage channels were invited to participate in the survey. In total, 33 providers of YouTube channels took part in the survey.