ONLINE MEDIA MONITORING 2019

ONLINE AUDIO AND VIDEO SERVICES IN SWITZERLAND

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
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Bundesamt für Kommunikation BAKOM

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KEY FACTS ONLINE AUDIO IN SWITZERLAND

/01

ONLINE AUDIO PROVIDERS

In 2019, a total of 440 online audio services are being produced by 145 providers in Switzerland. Two-thirds of services originate from traditional FM/DAB+ radio broadcasting systems.

/02

PUBLICATIONS

For more than half of providers, the number of online audio articles published has increased since 2018. From 2017, the number of audio minutes produced increased by 42% to around 1,400 minutes per month.

/03

TOTAL MARKET DEVELOPMENT

Between 2018 and 2021, online audio providers expect total advertising revenue in the Swiss online audio market with a CAGR of +18% to increase further by around CHF 1.9 million in 2021.

/04

ONLINE AUDIO USE

More than half of radio/audio consumption by Swiss internet users is now IP-based. Simulcast streams from FM transmitters and music streaming services are particularly popular: 43% listen to music services several times a week.

/05

PAID ONLINE AUDIO

In 2019, more than a third of Swiss internet users are using paid online audio services, with 48% being 16 to 29-year-olds. Those surveyed would pay on average CHF 7.80 per month for music streaming.

/06

OUTLOOK AND TRENDS

The major topics for the future of the online audio market in Switzerland are connected cars, smart speakers, personalisation of services and podcasts. 46% of current non-users can image listening to online audio in future.

Source: Online media monitoring 2019

KEY FACTS ONLINE VIDEO IN SWITZERLAND

/01

ONLINE VIDEO PROVIDERS

In 2019, a total of 165 online video services are being produced by 128 providers in Switzerland. 56% of services come from the traditional media sources of television, radio or print.

/02

PUBLICATIONS

For more than 54% of providers, the number of online videos published has increased since 2018. From 2017, the number of video minutes produced increased by 55% to around 440 minutes per month.

/03

TOTAL MARKET DEVELOPMENT

Between 2018 and 2021, online video providers expect total advertising revenue in the Swiss online video market with a CAGR of +49% to increase further by around CHF 49 million in 2021.

/04

ONLINE VIDEO USE

56% of TV and video use by Swiss internet users was consumed via the internet in 2019. Live TV programmes from TV channels and free video portals are particularly popular. Around one-third use these several times a week.

/05

PAID ONLINE VIDEO USE

8% of online video services are at least partially paid and more than half of Swiss internet users occasionally used these in 2019. Two-thirds of those surveyed were 16 to 29-year-olds.

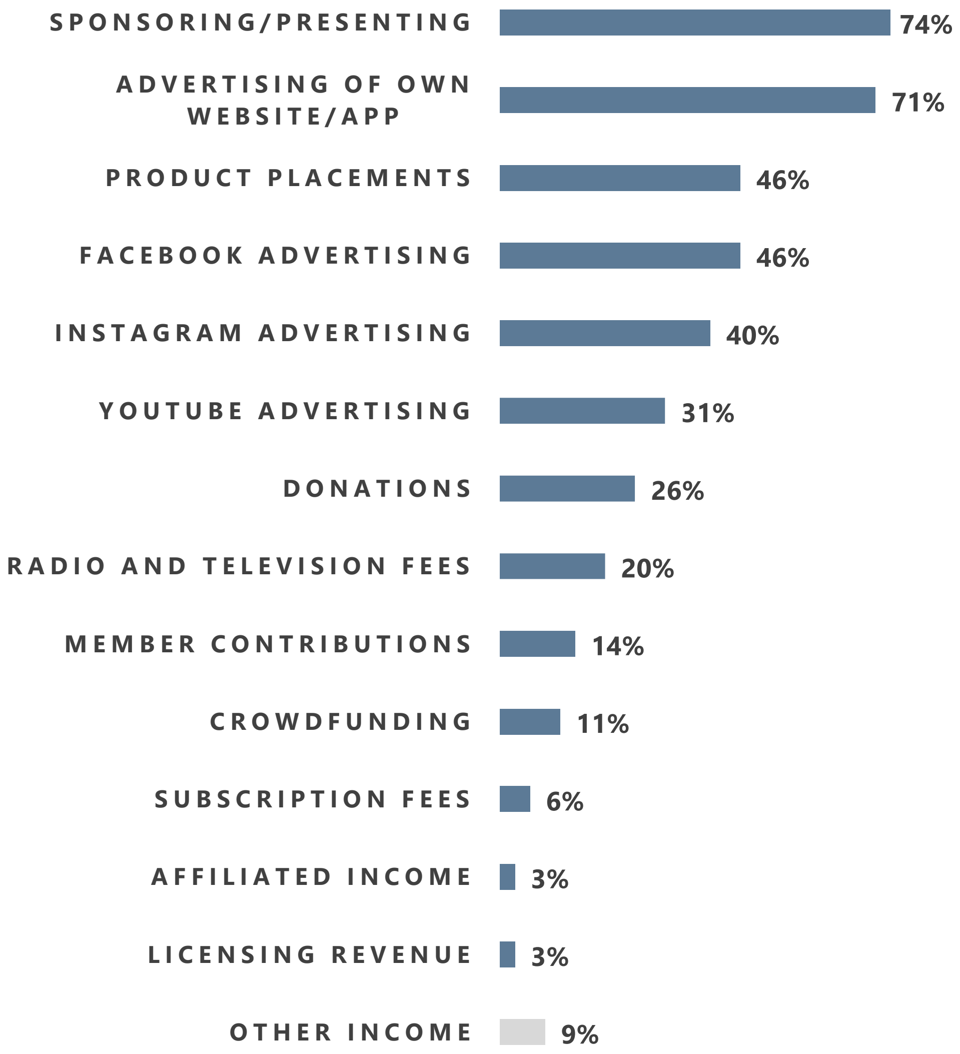
/06

OUTLOOK AND TRENDS

The major topics for the online video market in Switzerland are innovative formats, content interactivity as well as 5G and influencer marketing. 55% of current non-users can image watching online videos in future.

Source: Online media monitoring 2019

INCREASING SIGNIFICANCE OF SOURCES OF REVENUE BY 2021



SOURCES OF REVENUE BY 2021

The majority of online audio and video providers surveyed (74%) believe that the current most popular sources of revenue of *sponsoring/presenting* and *advertising on own websites* will become even more important over the next two years. Less than half of providers surveyed believe that the Facebook, Instagram and YouTube platforms will become more important by 2021.

Source: Online media monitoring 2019, n=35. Question: In your opinion, which sources of revenue will become more important for your online services in the next two years, i.e. by 2021?

METHODICAL BACKGROUND

The online media monitoring 2019 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 2019 connected with the explorative survey “Streaming Media Monitor 2017” carried out for OFCOM in 2017 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 21 May and 12 July 2019, to which all captured auditive and audio-visual 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.

In 2019, as part of the online media monitoring, data was gathered from 3,000 online audio and video users in total. This involves a representative survey of Swiss internet users which was also carried out online between 1 and 19 July 2019, whereby participants were asked about their online audio and video behaviour and their motives and backgrounds.

The survey also supports qualitative questioning of selected market players such as associations, providers, marketers and agencies as well as an additional extensive analysis of current secondary data and extensive desk research along with market prognoses.

DATABASE/POPULATION

All active services were recorded in the online media monitoring 2019, 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 2019: 145 online audio providers with 440 online audio services as well as 128 online video providers with 165 online video services (of which 12 are also online audio providers). In total, this corresponds to 261 streaming providers with 593 online audio and video services in total.

The number of providers who did not participate in the 2019 survey were 20 providers (no valid email address and/or telephone number). Thus, 241 online audio and video providers were invited to participate in the survey. 106 providers took part in total, which corresponds to a response rate of 44 percent (based on available providers).

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