Executive Summary: 2017 Streaming media monitor – Online audio and video offers in Switzerland

Key facts on the 2017 Swiss online audio market

- 165 providers in Switzerland operate 490 online audio offers with an average budget of CHF 90,000 annually of which approximately 64 percent are sub-brands or Simulcast broadcasters of classic VHF/DAB+ providers
- 46 percent of all offers are in German, 30 percent in French, 17 percent in English, and approximately 4 percent in Italian because of the specific regional situation of the Swiss market. (SRF has an offer in Romansh)
- Overall 72 percent of all providers see themselves as professional online audio offers that refinance themselves by advertising; 14 percent have no earnings
- Between 2017 and 2019, it is expected that total advertising sales on the Swiss online audio market will grow from CHF 719 thsd. in 2017 to CHF 1,130 thsd. in 2019 with a CAGR of 37 percent annually
- Online audio use primarily takes place on providers' websites, aggregators such as Tuneln, Soundcloud, and providers apps. Use is primarily mobile and should almost double from 80 min. per month to 150 min. per use per month by 2019

Key facts on the 2017 Swiss online video market

- 188 providers in Switzerland operate 227 online video offers with an average budget of CHF 73,000 annually. Of these, approximately 52 percent are sub-brands of classic media
- 64 percent of all online video offers are in German, 17 percent in French, 14 percent in Italian, and 8 percent are distributed in multiple languages. (SRF has an offer in Romansh)
- 73 percent of all providers see themselves as professional online video offers; 53 percent or nearly half of all providers, however, finance themselves by advertising; 17 percent have no earnings
- Between 2017 and 2019, it is expected that total advertising sales on the Swiss online video market will grow from CHF 13 mil. in 2017 to CHF 16 mil. in 2019 with a CAGR of 13 percent annually.
- Display advertising and sponsoring make up 2/3 of all advertising proceeds
- Online videos are primarily used on providers' websites, social media platforms like Facebook or YouTube, and providers' apps. Use is primarily mobile and should increase from 212 thsd. video viewings per month to 294 thsd. viewings by 2019

Source: Streaming Media Monitor 2017

2017 Streaming media monitor: Market delineation, study goals, and methodology

Clients and market delineation

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Bundesamt für Kommunikation BAKOM

Client: In March 2017, BAKOM commissioned Goldmedia to create an *exploratory study on the situation of the online audio and online video offers in Switzerland* The results will be presented on 08/24/2017 in Zurich.

Market delineation/definitions:

The exploratory study includes all relevant online audio and online video offers whose main office is in Switzerland. This includes...

all active web **radio*** (Simulcast and online only), **User-generated-radio and podcast offers** with IP or app-based distribution (linear or on-demand) with a focus on music and/or information as well as

all active **video offers*** with IP or app-based distribution (linear or on-demand) including **YouTube channels and Facebook video pages**

Study goals and methodology

Study goals:

- Market analysis of the streaming media industry in Switzerland
- Creating a market definition and delineating the individual types of offers and providers
- Quantifying the Swiss online audio/online video market
- Overview of the demand for online audio/online video
- Economic analysis of market and potential
- Trend estimations from a provider's point of view

Methodology:

- Primary data collection by online surveys among all Swiss online audio and online video providers
- Ten interviews with expert industry representatives (associations, providers, portals/platforms, marketers, agencies, streaming service providers, and others)
- Desk research/analysis of all primary and secondary data
- Market forecasts: top-down/bottom-up methodology

Source: Streaming Media Monitor 2017, * see detailed definitions in the method appendix

2017 Streaming media monitor – methodology of the provider survey for 165 online audio and 188 online video providers in Switzerland

Sample size, offers included, and responses

- **Sample size:**
  All providers of the defined online audio and online video offers whose main offices are in Switzerland:
  - 165 online audio providers with 490 audio offers and
  - 188 online video providers with 227 video offers (of which 18 are also online audio providers)
- Total amount of providers included in the Streaming media monitor: **717 online audio and online video offers** from a total of **335 streaming providers**
- **Number of providers technically available for the survey:**
  306 online audio and online video providers
  (with valid email addresses and/or telephone numbers)
- **Response rate:**
  225 providers participated (= approx. 74% response rate in regards to technically available providers)
- **Survey period:**
  May 30, 2017 – July 14, 2017
- **Image sources**
  (in the order they were used):
  © oneinchpunch_Fotolia.com
  © stokkete_Fotolia.com
  © daviles_Fotolia.com

Source: Streaming Media Monitor 2017

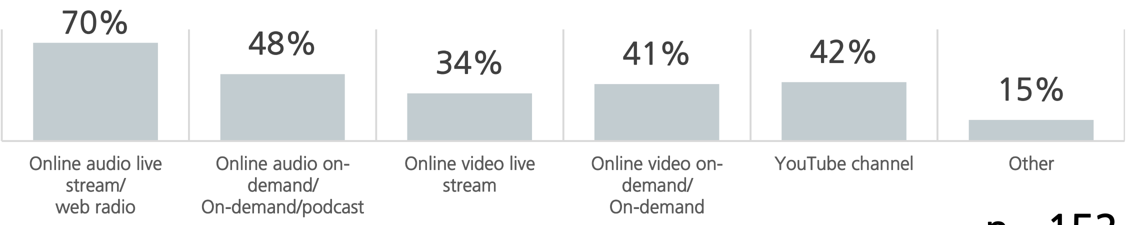
Sample details

- **Online only:** 52% of all online video providers are sub-brands of classic media; 64% of all online audio providers are sub-brands of classic VHF/DAB+ broadcasters and/or Simulcast radios
- **Advertising financing**: 53% of the responding online video providers and 72% of the online audio providers distribute advertising in the environment of their offer;
- **Professional providers:** approx. 73% of the responding providers per category operate their offer professionally

Sample in the 2017 Streaming media monitor, q1, n = 152

"Which forms of transfer do you provide for online audio or online video?"

Case summary q1:	Cases					
	Valid		Missing		Total	
	N	Percent	N	Percent	N	Percent
$q1[a]	152	67.6%	73	32.4%	225	100.0%



n =152