

Summary

IGEM Digimonitor 2023

The representative study on digital Switzerland



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New study results on Swiss media use:

Netflix is losing audience, but podcasts are booming. Cinema, radio, and teletext are celebrating a revival. TV remains at the top.

Zurich, 29.8.2023. **Media use in Switzerland is in a state of flux: Instagram is overtaking Facebook and Chat GPT is becoming a popular work tool. Netflix and YouTube are losing market share, but podcasts are on the rise - and classic media such as radio, cinema and teletext are on the rise again. TV is the top medium. This is shown in the annual Digimonitor study by the Interest Group Electronic Media (IGEM) and WEMF AG für Werbemedienforschung.**

- **Social media with new number 1:** Instagram overtakes Facebook to become largest social media platform.
- **Chat GPT gets off to a flying start, Metaverse fails to gain momentum:** Chat GPT has more than 1 million users right away. By contrast, only 88,000 people occasionally use Metaverse.
- **Video streaming fatigue:** After years of growth, YouTube, Netflix and Disney+ are now losing viewers.
- **Traditional media and audio on the upswing:** cinema and teletext are on the rise. In addition to radio, podcasts and Spotify are also gaining new listeners. TV is in the lead.
- **Digital money applications are growing, but cryptocurrencies are losing importance:** e-banking, Twint and Apple Pay are attracting many new customers, while cryptocurrencies are losing users.

Almost three quarters use social media

In Switzerland, 4.8 million people (72% of the population) use a social media platform at least occasionally. Half of them follow influencers, with the majority being under 40 years old. Strikingly, there are hardly any people with an interest in politics among these followers. Social shopping is gaining slightly in importance: 890,000 users (13%) buy something directly from a social media post at least occasionally, mainly people between 30 and 40 years old.

Instagram overtakes Facebook

Instagram increased by 150,000 users compared to the previous year and is now the most popular social media platform in Switzerland with 2.9 million users (42.2% of the population). Facebook, on the other hand, lost 180,000 users and now only has 2.8 million (41.7%). It is followed by LinkedIn with 2.0 million (29%), Pinterest with 1.5 million (21%) and Snapchat with 1.2 million (17%). TikTok grows slightly and reaches 1.1 million (16%). Twitter, now with the new name X, records 740,000 users (11%) after a small loss. The average age varies greatly: the 290,000 users of BeReal (4%) are the youngest with an average age of 21. Snapchat users are on average 24 years old and TikTok users 27 years old. On Facebook and LinkedIn, on the other hand, the average age is 46.

Chat GPT becomes a popular tool overnight

The hype surrounding Chat GPT is reflected in its use: the chatbot, which is operated with the help of artificial intelligence (AI), already has over one million users in Switzerland (15% of the population). Of these, 680,000 are men and 360,000 are women. This means that every fifth man and every 9th woman in Switzerland is already a user of Chat GPT. The tool has become particularly popular with younger people: almost half of all people in education use Chat GPT. The average age is 28.

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YouTube, Netflix, and Disney+ lose audience

The US market leaders in video streaming are all losing market share in Switzerland: YouTube has lost 370,000 viewers compared to the previous year and Netflix 300,000. While YouTube is losing audience share among men between 35 and 54, Netflix is mainly losing younger men under 35. YouTube currently has 4.3 million occasional viewers (64% of the population), Netflix 2.9 million (43%). Disney+ has 960,000 viewers (14%) after a slight loss. The other foreign providers all have relatively small market shares: Twitch has 450,000 viewers (6.6%), Amazon Prime Video 420,000 (6.2%), Sky 400,000 (5.9%), Apple TV Plus 350,000 (5.2%) and RTL+ 280,000 (4.1%).

The video offerings of SRF, RTS and RSI shape the Swiss streaming market

Among the streaming providers from Switzerland, the SRF/RTS/RSI websites and apps are clearly in the lead with 2.8 million viewers (42% of the population), followed by Play Suisse, the SRG streaming portal, with 1.3 million (19%). Blue+, formerly Teleclub, has 420,000 (6.2%) and MySports 340,000 (5.0%) viewers. The Swisscom blue TV app has 1.2 million (18.4%), Zattoo 680,000 (10%) and the Sunrise TV app 620,000 (9.2%) users. The websites of private TV broadcasters count 580,000 viewers (8.6%) and Salt TV 250,000 (3.6%). Quickline TV and OnePlus, the streaming service from 3+ and other broadcasters, both have just under 200,000 viewers (2.9%).

Television remains *the* mass medium

The popularity of classic television continues unabated: With 6.3 million viewers (93% of the population), almost the whole of Switzerland watches television. This means that the audience is more than twice as large as for Netflix. Two out of three people (63%) switch on the TV every day and TV is also popular with younger people: 3 out of 4 people under 30 (71%) watch at least once a week, every third person even watches daily (36%). The TV remains the most important electronic device by a narrow margin: 6.1 million (90%) use a TV set and 6.0 million a smartphone (88%). The most common device connected to the TV set is a Blue TV box from Swisscom (25%), followed by the Sunrise TV box (incl. UPC) (17%).

Commercials on time-shifted TV are often played over in the French-speaking part of Switzerland.

4.9 million (72% of the population) watch time-shifted TV at least occasionally. This is particularly popular among women between 35 and 54 years of age. Men under 35 do this least often. 3.9 million (57%) can fast-forward through commercials on at least some of the channels. This function is mainly used by women between 35 and 54 (69%) and people in French-speaking Switzerland (62%).

Entertainment is more popular than sport on pay TV

With the success of Netflix, pay TV has finally caught on. 2.5 million (36% of the population) pay for films, series, and entertainment. People under 35 and those with higher incomes are the most likely to spend money on entertainment. At 1.2 million (18%), around half as many pay for documentaries, again mainly people under 35. Sports content, on the other hand, is much less in demand: 900,000 people (13%) pay for it at least occasionally, with demand in Italian-speaking Switzerland being above average (23%). Two thirds of the audience for sports content are men. People under 35 are the most likely to pay for it - this applies to both men and women.

Cinema use almost reaches pre-Corona levels again

The cinemas are filling up again: 3.2 million (47% of the population) went to the cinema in the last six months. That is 570,000 more visitors than in the previous year. Swiss cinemas thus reach 92% of their pre-Corona attendance figures. Younger people go to the cinema more often: two out of three people under 35 (65%) went at least once in the last six months. The cinema is particularly popular among people with a higher education or higher income.

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Teletext grows by half a million users

Teletext remains surprisingly popular: usage is up by 520,000 compared to the previous year. A total of 2.5 million (37% of the population) obtain information at least occasionally via teletext. 1.6 million (23%) even use the service at least once a week - one in four Swiss men and one in five women. Among men, Teletext is already popular from the age of 35, among women the use increases from the age of 55. The average age is 54. Teletext appeals primarily to people with an interest in sport, politics, and business, as well as the audience of SRG, MySports and Blick TV.

Podcasts are in vogue

Podcasts are still on the rise: Compared to the previous year, usage has increased by 270,000 people. Of the total of 2.9 million (43% of the population), most are occasional listeners. Only 400,000 people (6%) use podcasts daily. Podcasts have a relatively young audience compared to music streaming and radio: 54% of people under 55 listen to podcasts at least occasionally and the average age is 44. The most frequently used podcast platforms in Switzerland are those of SRF/RTS/RSI (21%), Spotify (20%) and YouTube (16%). This puts SRG at the top for the first time. For people under 35, however, Spotify and YouTube remain the most important podcast platforms.

Spotify accompanies the younger ones through everyday life

Overall, 5.1 million people (75%) listen to audio streaming at least occasionally. The SRF/RTS/RSI websites and apps are the most popular audio platform across all population groups, with 2.84 million listeners (42% of the population). Among the younger generations, however, Spotify is clearly in first place, gaining 140,000 new users and now has 2.8 million listeners (41%). 1.5 million (23%) use Spotify daily, with almost two-thirds buying the ad-free paid version. The average age is 36.

Radio breaks the 6 million barrier

With 190,000 new listeners, classical radio defies the streaming competition. With 6.1 million (90% of the population), the broad masses listen to the radio, 4 million (59%) even daily. This means that the medium has more than twice as many listeners as Spotify. The average listener is 51 years old, but younger people also listen to the radio: 83% of people under 35 listen occasionally and 35% daily.

Almost 90% read news online, but only 20% pay for it

The Swiss also inform themselves very often on online news portals: 5.8 million (86% of the population) read news on the internet at least occasionally. Swiss news portals such as 20min.ch, blick.ch or lematin.ch reach a total of 5.2 million people (76%). 1.4 million (20%) pay for a digital news subscription, whereby usage is strongly dependent on income.

Swiss payment app Twint grows three times faster than Apple Pay

Mobile payment services are experiencing enormous growth and are now used at least occasionally by 4.3 million (64% of the population). There is a clear market leader: Twint is clearly in first place with 450,000 new users and 4.1 million (60%) overall in all population groups. The average age of users is 45. Apple Pay has grown significantly less, with 160,000 new users and currently 760,000 (11%). Google Pay has grown by 100,000 and now has 340,000 users (5%).

QR-bill revolutionises e-banking

E-banking is already part of everyday life for most of the population. With an increase of 380,000 new users, 5.4 million (80% of the population) now do their banking online. 3.7 million (55%) also use smartphones for some of their transactions. With the introduction of the QR bill, 870,000 new users scan QR codes. Already 5 million people (74%) do this at least occasionally.

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Cryptocurrencies lose importance

The Bitcoin & Co boom is slowing down: With 370,000 people (5% of the population), 120,000 fewer use a cryptocurrency than in the previous year. On average, the users are 31 years old and three quarters of them are male. Men under 40 and with higher incomes are disproportionately frequent users of cryptocurrencies. Almost every fifth man under 40 owns a cryptocurrency.

Metaverse remains a dream of the future

The metaverse has barely been able to gain a foothold in Switzerland. Only 88,000 people (1.3% of the population) use a metaverse such as Decentraland or The Sandbox at least occasionally, including 62,000 men and 26,000 women. At 23, the average age is very low.

About the IGEM Digimonitor 2023 study

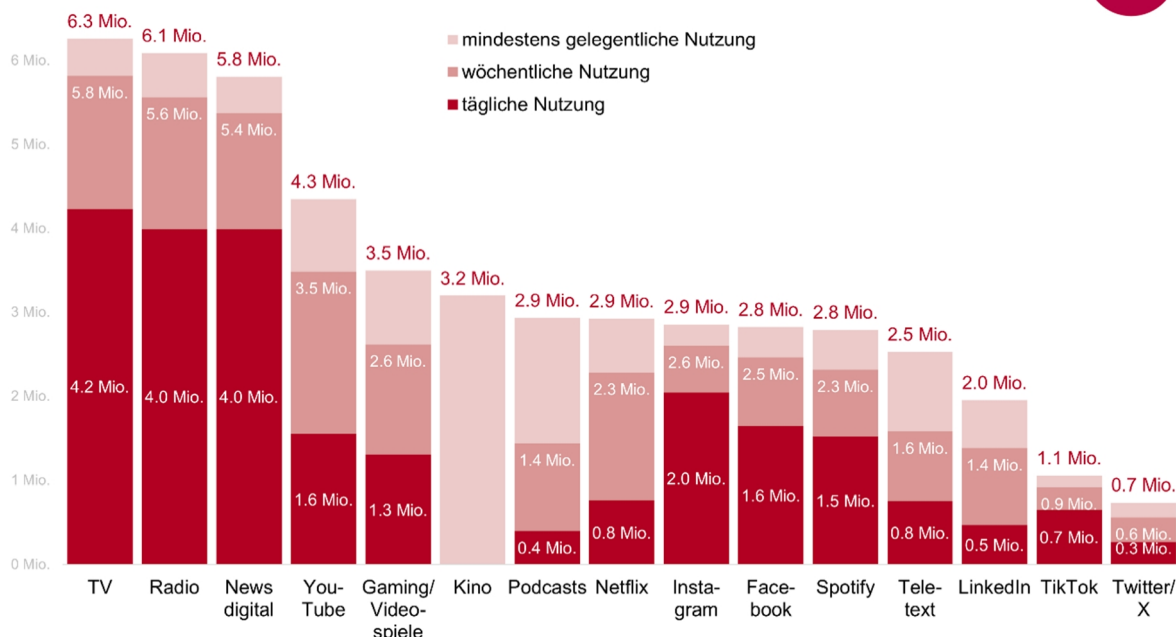
The Digimonitor study has been surveying the use of electronic media and devices in Switzerland every year since 2014. The data is representative of the Swiss population aged 15 and over (6.8 million people), because offliners and people without a landline are also surveyed. The telephone and online survey took place from the beginning of April to mid-June 2023. On behalf of IGEM Interest Group Electronic Media and WEMF AG für Werbemedienforschung, LINK surveyed 2,087 people, 1,052 of them in German-speaking Switzerland, 797 in French-speaking Switzerland and 238 in Italian-speaking Switzerland. The confidence interval is a maximum of +/- 2.2 percentage points. Italian-speaking Switzerland was surveyed exclusively in 2021 and 2023. Therefore, comparisons with the previous year are only possible on a limited basis (German and French-speaking Switzerland).

The results are available to IGEM members free of charge. Non-members can obtain the study for CHF 5000.

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Graphic 1

Nutzung elektronischer Medien und ausgewählter Plattformen in der Schweiz 2023
Gesamtbevölkerung ab 15 Jahren



Quelle: IGEM-Digimonitor 2023, Bevölkerung ab 15 Jahren in der Schweiz (6.8 Mio. Personen), n=2'087 Befragte.

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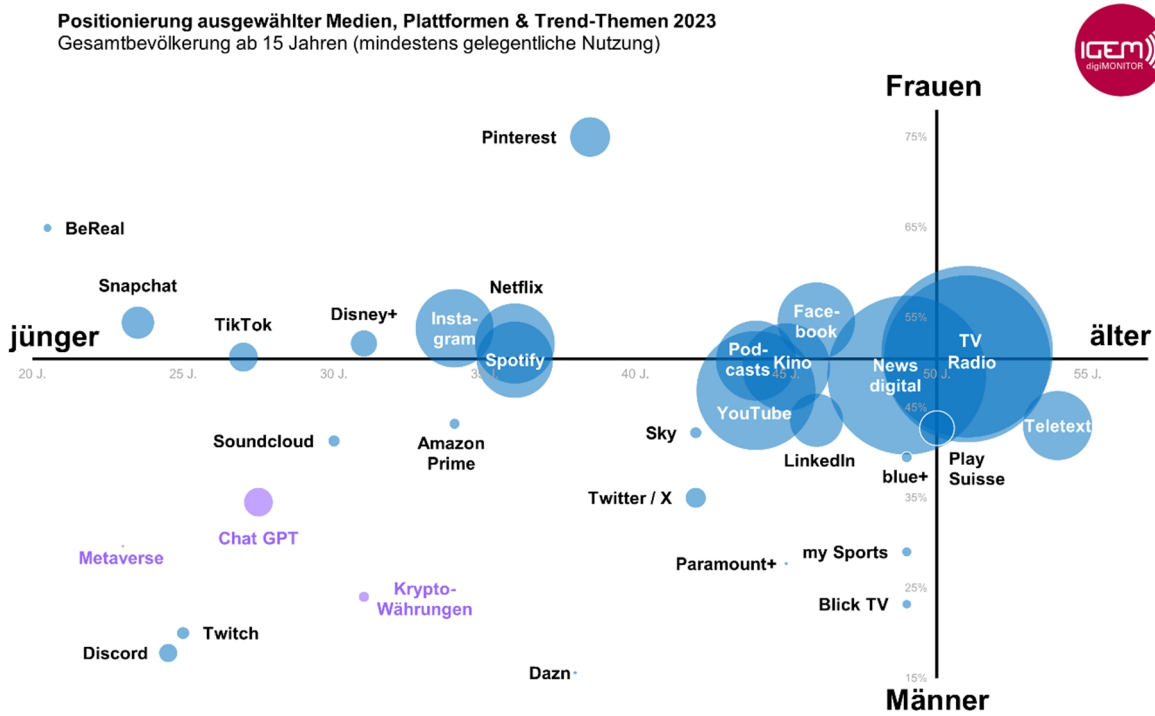
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Graphic 2

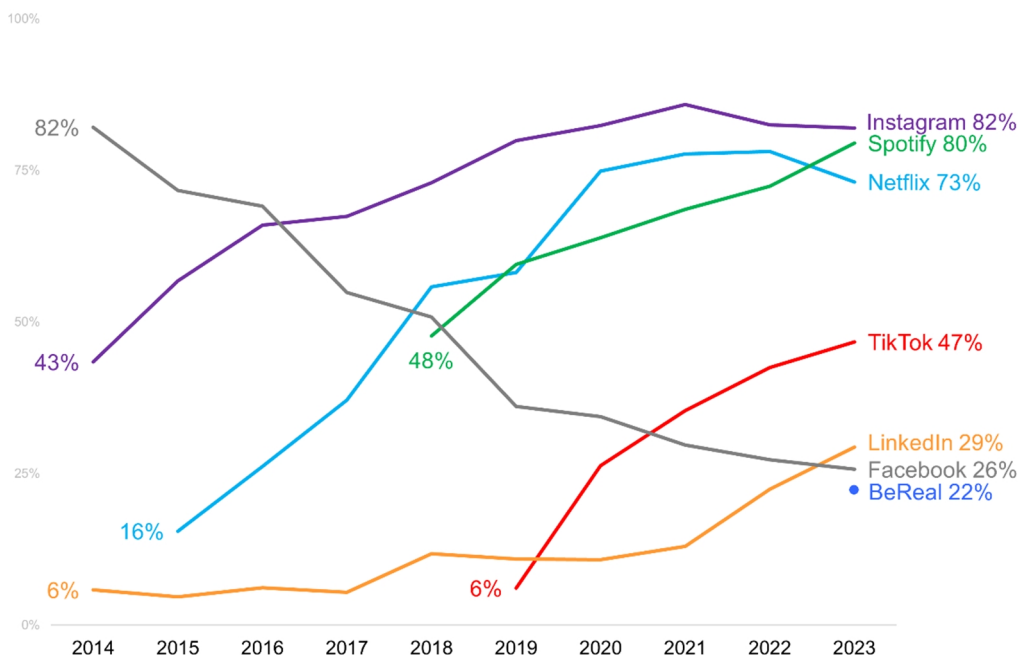
Positionierung ausgewählter Medien, Plattformen & Trend-Themen 2023
Gesamtbevölkerung ab 15 Jahren (mindestens gelegentliche Nutzung)



Quelle: IGEM-Digimonitor 2023, Bevölkerung ab 15 Jahren in Schweiz (6.8 Mio. Personen), n=2'087. Grösse der Kreise entspricht dem weitesten Nutzerkreis bei Gesamtbevölkerung; x-Achse: Durchschnittsalter der Nutzer, ø Alter Gesamtbevölkerung = 50 Jahre (Median); y-Achse: Frauenanteil an allen Nutzern.

Graphic 3

Entwicklung 2014-2023 ausgewählter Social Media und Streaming Plattformen in der Schweiz
Junge Personen 15-24 Jahre (mindestens gelegentliche Nutzung)



Quelle: IGEM-Digimonitor 2023, Personen 15-24 Jahre in der Deutsch- & Westschweiz (940'000 Personen), n=290 Befragte. Mindestens gelegentliche Nutzung.