

Summary study

IGEM-Digimonitor 2022

The representative study on digital Switzerland



New study results on Swiss media use:

Streaming at an all-time high: Netflix, Spotify and Disney+ each gain 400,000 new users. Despite competition: TV, radio, digital news and cinema reach the masses.

Zurich, 1.9.2022. Digitalisation is advancing in Switzerland. The use of e-banking and streaming services is increasing significantly. This brings new users to Twint, Netflix, Spotify and Disney+. Despite competition, the Swiss use the classic media TV, radio, digital news and cinema in broad masses from young to old. This is shown in the annual Digimonitor study by the interest group for electronic media (IGEM) and WEMF AG for Advertising Media Research.

- **TikTok, Instagram and LinkedIn increase by 150,000 to 200,000 new users.** Facebook is the social network with the largest user base with 2.8 million (44% of the population). It is followed by Instagram with 2.5 million (39%), LinkedIn with 1.8 million (28%), Pinterest with 1.4 million (21%) and Snapchat with 1.0 million (16%). TikTok has 860,000 (13%) and Discord 630,000 (10%) occasional users.
- **Netflix breaks the 3 million barrier with 400,000 new users.** Only YouTube has more people streaming, with 4.5 million (70%). Play Suisse, the Swiss streaming service of the SRG, has 1.1 million (17%) and Disney+ 1.0 million (16%) viewers. Traditional television has 5.9 million (91%) viewers, almost twice as many as Netflix and 1.4 million more than YouTube.
- **4 out of 5 cinema-goers have already found their way back to the cinema.** 2.5 million (39% of the population) have gone to the cinema in the last six months.
- **More than 3 out of 4 people read news online: Only one fifth of the population pays for it.** Reading news online is widespread among all age groups with 5.0 million people. 1.1 million (18% of the population) pay for a digital news subscription.
- **Radio has 5.6 million listeners, podcasts 2.6 million and on Spotify alone 2.5 million stream music.** With its 5.6 million (87% of the population), radio has more than twice as many listeners as podcasts (40%) or Spotify (39%).
- **Just under a third inform themselves via teletext.** Compared to the previous year, teletext use has decreased by almost 400,000 people and now stands at 1.9 million users (30% of the population).
- **Payment app Twint is the growth winner with 700,000 new users.** 53% of the population or 3.4 million people use the Swiss payment app Twint at least occasionally.
- **Crypto-currencies as a male domain.** Just under half a million people (7% of the population) use cryptocurrencies in Switzerland. Crypto users are almost exclusively men.
- **Video conferencing remains an integral part of everyday office life, even after home office.** 4.0 million (61% of the population) continue to use a video conferencing tool at least occasionally. 1.1 million (18%) continue to have a video conference every day.

More than 3 out of 4 people read news online: Only one fifth of the population pays for it

5.0 million (77% of the population) read news on the internet at least occasionally. 2.7 million (41%) use a free login or registration for this purpose. 1.9 million (29%) do not use any news services that require registration. 1.1 million (18%) pay for a digital news subscription. Paid digital subscriptions are strongly income-dependent. Only one in 11 people from a household with a gross monthly income of up to CHF 6,000 can afford a digital news subscription (150,000 people, 9% of this income class), but one in three people from a household with an income of more than CHF 10,000 (500,000 people / 31% of this income class).

More than a quarter of the population follows an influencer, one in nine has already used social shopping

A total of 4.7 million people (72% of the population) use a social media platform at least occasionally. 1.9 million people (29% of the population) follow an influencer. Two-thirds of these followers (1.2 million) are under 35 years old. 740,000 people (11% of the population) at least occasionally buy something directly from

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a post on social media. This so-called social shopping is mainly used by people between 30 and 40 years of age.

Instagram moves closer to Facebook

With 170,000 new users, Instagram is moving closer to Facebook. 2.5 million (39% of the population) are now occasionally on Instagram, while 2.8 million (44%) are still on Facebook. Among younger people, Instagram has been significantly more popular than Facebook since 2017: Instagram has 610,000 users between 15 and 24 (83% of this age group), Facebook only 200,000 (27%). Snapchat (70%), TikTok (43%), Pinterest and the gaming platform Discord (both 37%) are also used by more young Swiss people than Facebook (27%).

TikTok, LinkedIn and Discord gain users, Pinterest loses

With 190,000 new users, TikTok is growing slightly faster than Instagram. TikTok now has 860,000 at least occasional users (13% of the population) in Switzerland. The business platform LinkedIn gains 150,000 new users. 1.8 million (28% of the population) use LinkedIn from time to time. Although LinkedIn is growing primarily among women, a good six out of ten LinkedIn users are still male. Discord, on the other hand, is growing practically only among men. Of the 90,000 new users, 85,000 are men. In total, 630,000 people (9.8% of the population) use Discord at least occasionally. Among the social media platforms, only Pinterest has suffered a greater loss, with 130,000 fewer users. 1.4 million (21% of the population) use Pinterest at least occasionally. Twitter remains virtually stable at 780,000 users (12% of the population): two out of three users are male.

Snapchat and Discord users are around 20 years younger than Facebook or LinkedIn users

One million (16%) use Snapchat in Switzerland. More than half are under 25 years old. Snapchat and Discord are among the platforms with the youngest users. On Snapchat, a user is on average 24 years old and on Discord 25 years old. An average Facebook or LinkedIn user, on the other hand, is 44 years old.

Netflix cracks 3 million viewer mark

Netflix cracks the 3 million mark with 400,000 new users. Almost half of the population (48%) watches Netflix at least occasionally. Disney+ also reaches one million viewers with 400,000 new viewers (16% of the population). Play Suisse, the Swiss streaming portal of the SRG, is used at least occasionally by 1.1 million (17% of the population). Blue+, the former Teleclub offering, has 450,000 (7%) users. The Swiss web TV providers "Swisscom blue TV App" have 1.1 million (18%), Zattoo 630,000 (10%) and Wilmaa 290,000 (4.5%) viewers.

Other video providers rival each other in the Swiss market for viewers and subscribers. Twitch has 445,000 viewers (6.9%), Sky 390,000 (6.1%), Amazon Prime 340,000 (5.3%), RTL+ 310,000 (4.8%) and Apple TV Plus 300,000 (4.9%) users. However, they are all still far behind the use of YouTube (70%), Netflix (48%) or classic television (91%).

TV has 5.9 million viewers, YouTube 4.5 million and Netflix 3.1 million.

Classic television is popular in Switzerland: with 5.9 million (91% of the population), the broad masses watch television. And they do so very frequently: two out of three people (62%) in Switzerland switch on the TV every day. Younger people also watch TV: 3 out of 4 people under 30 (70%) watch TV at least once a week. And one in three even watch daily (30%). Classic television has almost twice as many viewers as Netflix (48%). Compared to YouTube (70%), classic television also has 1.4 million more viewers.

4 out of 5 cinema-goers have already found their way back to the cinema

2.5 million (39% of the population) went to the cinema in the last six months. In 2020, this figure was 3.2 million (51%). Two out of three people under 25 (65%) went to the cinema at least once in the last six months. While younger people are going to the cinema again almost to the same extent as before the pandemic, people aged 60 and over in particular have not yet found their way back to the cinema to the same extent.

Just under a third inform themselves via teletext

Compared to the previous year, teletext use decreases by almost 400,000 people. But still 1.9 million (30% of the population) inform themselves at least occasionally about teletext. 1.2 million (18%) even use teletext at least once a week: every 5th man and every 6th woman in Switzerland.

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Radio has 5.6 million listeners, podcasts 2.6 million and Spotify alone is used by 2.5 million for music streaming

Of the 2.6 million (40% of the population) podcast listeners, most are occasional listeners. Only 300,000 people (5%) listen to podcasts daily. The most frequently used podcast platforms in Switzerland are Spotify (18%), SRF/RTS websites and apps (17%) and YouTube (15%).

Spotify is the most popular music streaming platform with 2.5 million users (39% of the population). 1.4 million (22%) use Spotify daily. Spotify has gained 400,000 new users in the space of a year. 9 out of 10 new Spotify users buy the paid version. Half of Spotify users are under 35 years old.

Despite music streaming and podcasts, radio is popular in Switzerland. With 5.6 million (87% of the population), almost all listen to the radio, 3.8 million (59%) even daily. Three out of four people under 30 listen to the radio (74%), and just under a third even listen daily (31%). With its 5.6 million, radio has more than twice as many listeners as Spotify (2.5 million, 39%).

Swiss payment app Twint grows by 700,000 users, Apple Pay by 200,000

3.7 million (58% of the population) use mobile payment services such as Twint and Apple or Google Pay at least occasionally. In 2020, Twint had only 1.7 million (27%) or more male users. After strong growth, Twint has a balanced gender ratio, with 3.4 million (53%) across all demographics, ahead of Apple Pay with 570,000 (8.9%) and Google Pay with 215,000 (3.3%) users.

Cryptocurrencies as a male domain: Every fifth man between 20 and 40 uses a cryptocurrency

470,000 people (7.2% of the population) use a cryptocurrency. Crypto users are on average 33 years old and almost exclusively men. Especially men between the ages of 20 and 40 and people with higher incomes are disproportionately frequent users of cryptocurrencies.

Video conferences remain even after home office

Compared to the previous year, the use of video conferencing tools at least occasionally has decreased. Nevertheless, 4.0 million (61% of the population) still use a video conferencing tool at least occasionally. Daily use has even remained stable at 1.1 million people (18%). Microsoft Teams is the most used platform with 2.5 million users (38%), followed by Zoom with 2.2 million (35%), while Skype has 1.7 million (26%) and Google Meet 640,000 users (10%).

About the IGEM Digimonitor 2022 study

The Digimonitor study has been surveying the use of electronic media and devices in Switzerland annually since 2014. The data is representative of the population aged 15 and over in German- and French-speaking Switzerland (6.5 million people) because offliners and people without a fixed-line connection are also surveyed. The telephone and online survey took place from the beginning of April to mid-June 2022. On behalf of IGEM Interessengemeinschaft elektronische Medien and WEMF AG für Werbemedienforschung, LINK surveyed 1,842 people, 1,058 of them in German-speaking Switzerland and 784 in French-speaking Switzerland. The confidence interval is a maximum of +/- 2.3 percentage points.

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

More info: www.igem.ch / **Contact:** Siri Fischer, Managing Director IGEM, info@igem.ch, Tel. 044 242 23 12

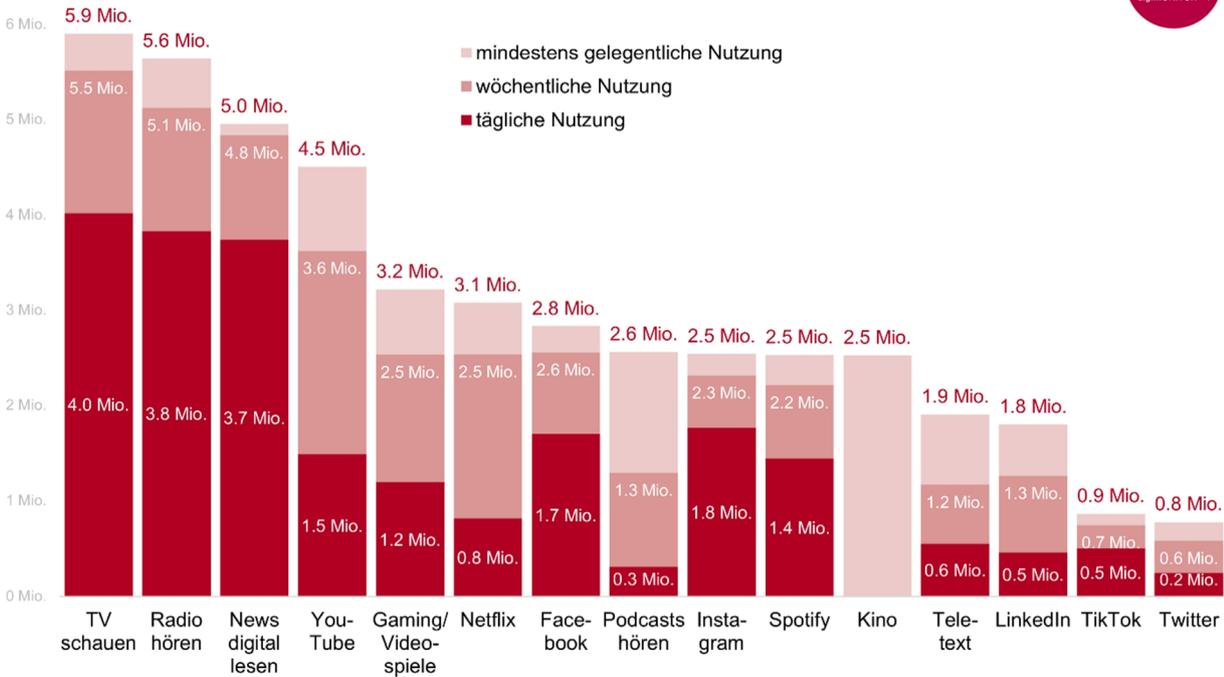
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Graphic 1

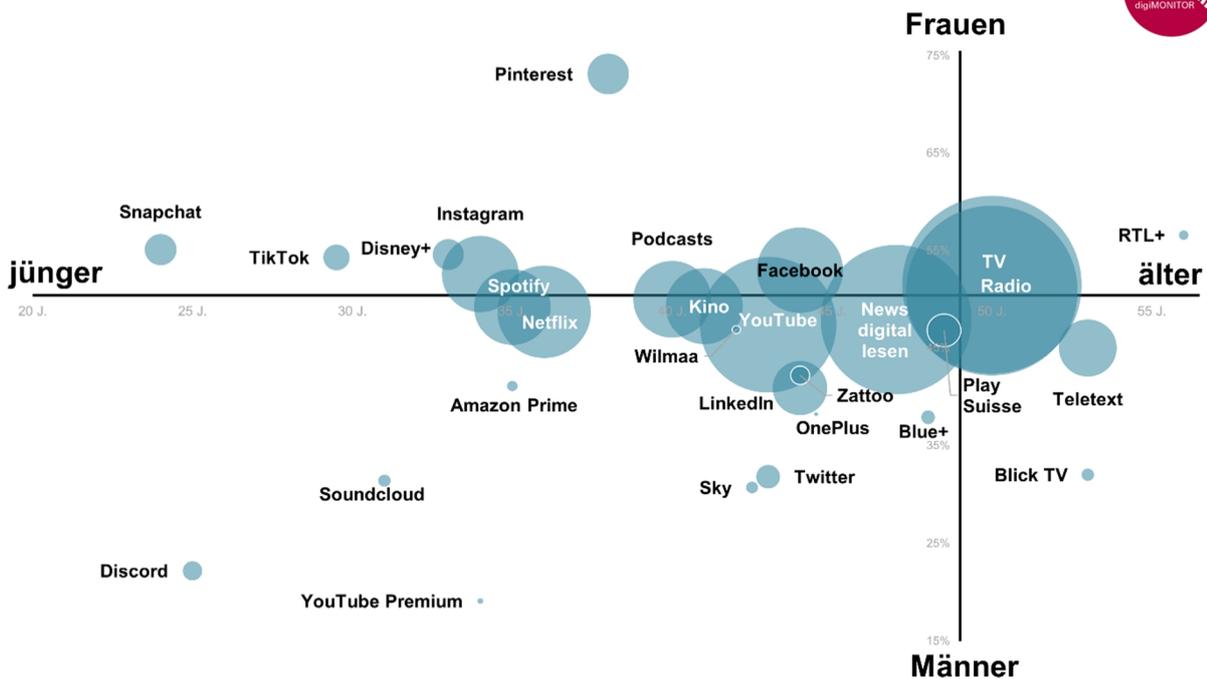
Nutzung elektronischer Medien und ausgewählter Plattformen in der Schweiz 2022
Gesamtbevölkerung ab 15 Jahren



Quelle: IGEM-Digimonitor 2022, Bevölkerung ab 15 Jahren in der Deutsch- & Westschweiz (6.5 Mio. Personen), n=1'842.

Graph 2

Positionierung ausgewählter Medien und Plattformen 2022
Gesamtbevölkerung ab 15 Jahren (mindestens gelegentliche Nutzung)



Quelle: IGEM-Digimonitor 2022, Bevölkerung ab 15 Jahren in Deutsch- & Westschweiz (6.5 Mio. Personen), n=1'842. Grösse der Kreise entspricht dem weitesten Nutzerkreis bei Gesamtbevölkerung; x-Achse: Durchschnittsalter der Nutzer, ø Alter Gesamtbevölkerung = 49 Jahre (Median); y-Achse: Frauenanteil an allen Nutzern.

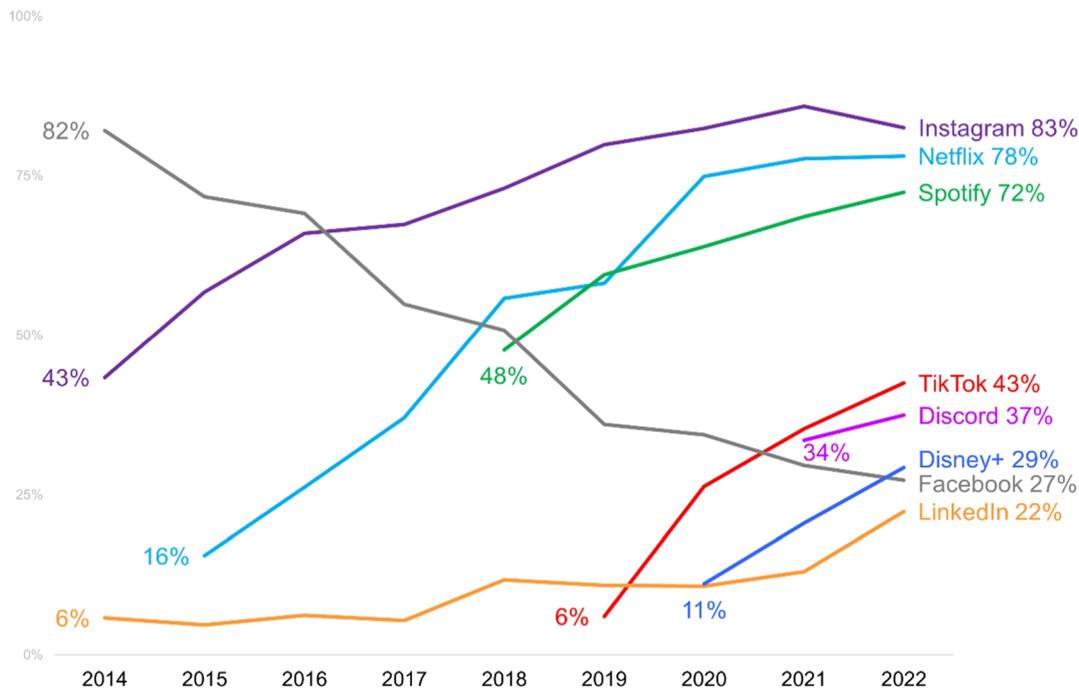
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Graphic 3

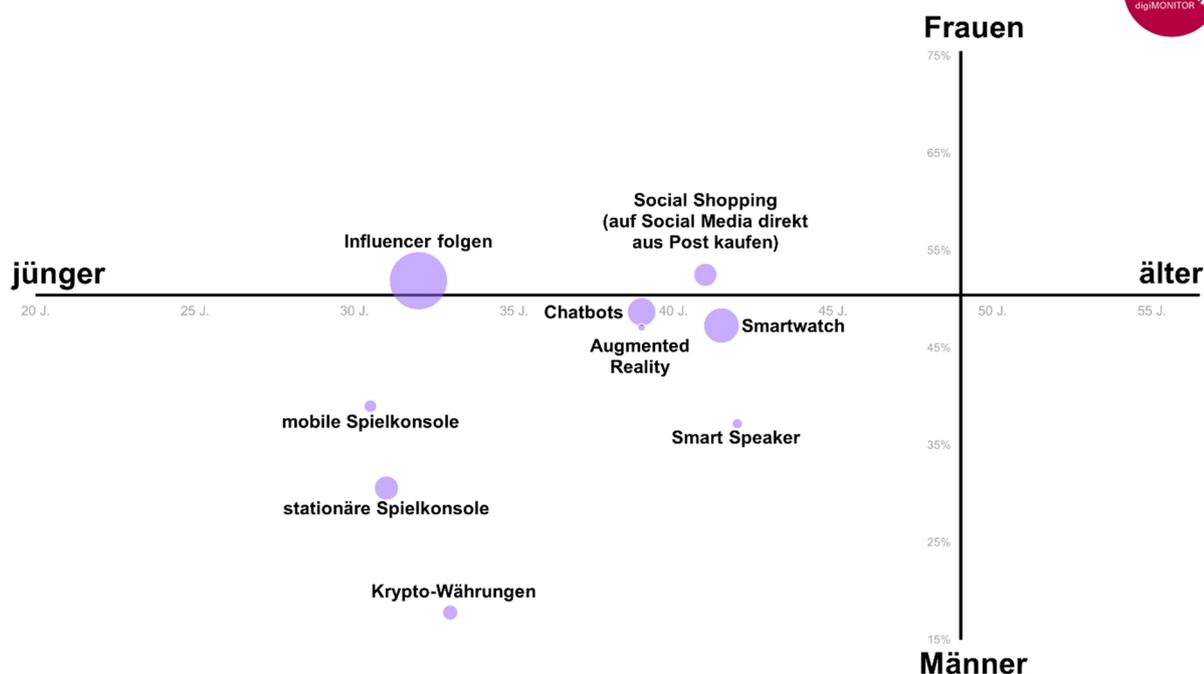
Entwicklung 2014-2022 ausgewählter Social Media und Streaming Plattformen in der Schweiz
Junge Personen 15-24 Jahre (mindestens gelegentliche Nutzung)



Quelle: IGEM-Digimonitor 2022, Personen 15-24 Jahre in der Deutsch- & Westschweiz (744'000 Personen), n=212. Mindestens gelegentliche Nutzung.

Graphic 4

Positionierung ausgewählter Technologien und Trend-Themen 2022
Gesamtbevölkerung ab 15 Jahren (mindestens gelegentliche Nutzung)



Quelle: IGEM-Digimonitor 2022, Bevölkerung ab 15 Jahren in Deutsch- & Westschweiz (6.5 Mio. Personen), n=1'842. Grösse der Kreise entspricht dem weitesten Nutzerkreis bei Gesamtbevölkerung; x-Achse: Durchschnittsalter der Nutzer, ø Alter Gesamtbevölkerung = 49 Jahre (Median); y-Achse: Frauenanteil an allen Nutzern.