



**Starting position:** as yet, there are **no established figures** available to quantify the value of news to tech giants that would enable **Swiss media companies to receive fair compensation** under ancillary copyright.



**Objective:** to carry out a **study** that will provide **specific, reliable figures** on the **value of news** to tech giants in Switzerland, which would help to capture and quantify the order of magnitude of the value of news.

### CENTRAL QUESTIONS

#### 1 How do people behave when they are searching for up-to-date information?

Are tech giants (like Google) replacing the reception of classic media?

#### 2 Transfer of attractiveness What influence does the integration of media content in Google have on the information ecosystem? To what extent do tech giants like Google benefit from the attractiveness of Swiss media?

#### 3 Derivation from the behavioural model How can the media's contribution to the Google ecosystem be fairly compensated?

### KEY FINDINGS OF THE STUDY

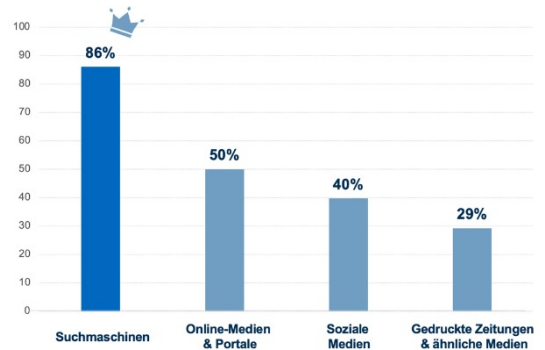
- **Eighty-six per cent of the Swiss population primarily** use Google & other search engines to look for information.
- A large proportion of users (53%) **stay within the Google ecosystem when searching Google** and do not click their way through to other media or websites.
- In **70% of cases** it is **media content** that makes a **significant contribution** to a positive search experience.
- Users are **significantly more successful** with their search & **significantly more satisfied with the results** if **media content** is included.
- People are prepared to pay **16% more** for Google **WITH** media content than **WITHOUT**.
- When people see Google **WITHOUT** media content, they are **less likely** to use Google for their next search, preferring to opt for **other information channels, such as media websites**.

### HOW CAN THE MEDIA'S CONTRIBUTION TO THE DIGITAL ECOSYSTEMS OF THE TECH GIANTS BE FINANCIALLY EVALUATED? *Derivation using Google as an example*

- **How much turnover does Google make annually in Switzerland with information searches?**
    - Google makes around **CHF 1 bn** a year in sales with search engine advertising (**SEA**) in Switzerland
    - **Approx. 55%** of searches are **searches for information**, so around **CHF 550 m relevant turnover**
  - **What part do the media play in this?**
    - The experiment shows: **media content makes a significant contribution of 70%** to searches for information.
    - This indicates that Google generates approx. **CHF 385 m in SEA turnover** every year thanks to media content in Switzerland.
  - **What would be a fair share of this value contribution?**
    - The study identifies a **market failure** because the media are not **compensated by Google for their value contribution**.
    - The study comes to the conclusion that a **fair share** of the online advertising market would be around **40%**.
- = That corresponds to a compensation for services amounting to at least CHF 154 m per year.**

### HOW DO PEOPLE BEHAVE WHEN THEY ARE SEARCHING FOR UP-TO-DATE INFORMATION?

- ✓ The experiment results show that Google is the **most used source of information** in the information ecosystem (86% of respondents choose search engines).
- ✓ The majority of users (53%) **stay on Google when searching for information** and *do not* click on external links. This is particularly clear among mobile device users.



### TRANSFER OF ATTRACTIVENESS

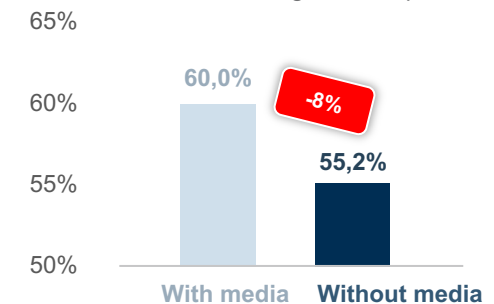
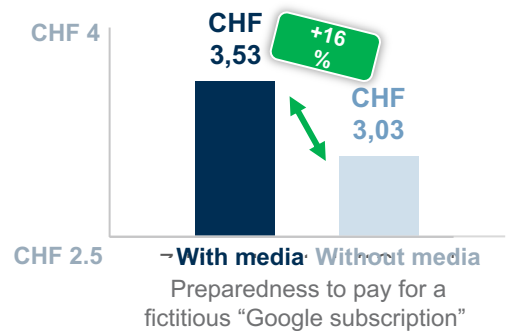
*To what extent do tech giants benefit from the attractiveness of Swiss media?*

- ✓ The integration of media content on Google leads to a **significantly higher success rate** in Google searches and to greater **satisfaction with the results**. The inclusion of media content tends to make Google more attractive, credible, qualitative and complete for Swiss users.
- ✓ People in Switzerland prefer a Google search with media content – **70% of respondents choose a Google that includes media content**. In the eyes of users, a Google search WITH media content is worth 16% (significantly) more than a Google search WITHOUT media content.
- ✓ Without the display of media content on Google, there could be long-term effects on users' search channel preferences. The results of the study show that such a scenario would lead to **8% fewer people** searching for current information on Google in the short term. Instead, they would be more likely to search directly on media websites (+55%).

**Satisfaction score** (max. 5 points)  
How satisfied are you with the search results displayed?

**Google WITH media**  
**Google WITHOUT media**

4.1  
3.9



How often is Google selected for repeated searches?\*

Based on a representative online experiment with 1573 participants in Switzerland in January/February 2023