

TV Streaming Report 2022

Switzerland

Dear Sir or Madam,

How did the TV viewing habits of Swiss Internet users evolve in the second year of the COVID-19 pandemic? What changes occurred in the way people watch TV on the Internet? TV streaming provider Zattoo examines these and other questions in this year's TV Streaming Report 2022. The results for Switzerland show that the Internet is becoming increasingly popular as a TV reception method and that the Swiss see time-shifted TV as the most important advantage of TV streaming services.

The report is based on an online representative survey of an online panel of 800 Swiss Internet users between the ages of 16 and 69 conducted by the market research company Kantar on behalf of Zattoo at the beginning of 2022. Kantar and Zattoo have conducted this survey in Switzerland each year since 2015. The report helps to identify the current trends in Internet and TV usage, as well as the TV streaming market. For Zattoo, the purpose of the report is to provide a discussion document about the significance of TV streaming. This year, the following trends can be identified for Switzerland:

TV reception via the Internet continues to grow, cable loses significant market share

In terms of TV reception methods, the trend seen in recent years is continuing. As much as 61 percent of Internet users in Switzerland use the Internet as their TV reception channel. This includes both IPTV services and TV streaming apps. This is five percentage points more than in the previous year. The data also shows that French-speaking Swiss Internet users, at 68 percent, are more likely to use the Internet as a TV reception channel than German speakers, with a score of 59 percent. Reception via cable, on the other hand, is losing ground significantly compared to 2021. Only 40 percent of Swiss Internet users still receive their TV via cable. In the previous year, this was still 51 percent. The Internet thus remains the most-used TV reception method in Switzerland and is further extending its lead. Reception via satellite (7 percent) and DVB-T (3 percent) also lost two percentage points each.

Live TV use on the Internet increases slightly

In terms of video and TV services, 42 percent of users online watched live TV via the Internet during the second year of the COVID-19 pandemic. This is two percentage points higher than in the previous year and eight percentage points more than in 2020. At 60 percent, French-speaking Internet users watch significantly more live TV than German-speaking users, for whom the figure is just 36 percent. The increase in live TV usage in the last two years goes against the declining trend that was still evident before the COVID-19 pandemic. This shows that live TV ranks just behind YouTube as the source for watching TV and video most used by the Swiss. Although the use of YouTube has fallen from 66 percent in 2021 to just 58 percent in 2022, the video portal remains the most popular source for watching TV on the Internet.

The broadcasters' media libraries are used by 21 percent of online users in Switzerland. This is three percentage points less than in 2021. Looking at the individual platforms, only Play SRF has seen a slight increase of two percentage points to 53 percent this year and thus remains the most widely used media library in Switzerland. All other media libraries have lost percentage points compared to last year. The ARD media library in particular dropped from 38 percent in 2021 to just 30 percent in 2022. The media libraries of ProSieben (21 percent) and Sat.1 (18 percent) also lost six and five percentage points respectively compared to the previous year.

Video-on-demand is only seeing a slight increase this year from 23 percent in 2021 to 24 percent. When we look at the performance of individual providers in Switzerland, Netflix in particular shows a strong increase of eleven percentage points to reach 79% and thus remains the most popular video-on-demand service in Switzerland. Disney+ has grown strongly this year, from 20 percent in 2021 to 27 percent in 2022. The new platforms included this year, Blue Play and Play Suisse each start at 15 and 18 percent respectively.

For the first time this year, the survey also asked about the use of video content offered via social media. These came in at 17 percent in the first year of the survey.

DTV streaming usage on smart TVs increases, mobile usage decreases

79 percent of Internet users who watch TV at least once a week already use TV streaming services. In answer to the question of which devices are the most used for TV streaming, smart TVs are in the lead this year, scoring the number one spot. Almost every second TV streaming user (49 percent) watches on a smart TV. That is four percentage points more than last year, continuing the trend of recent years toward more use of big screens when streaming. Even though PCs and laptops have grown by one percentage point compared to 2021, they cannot keep up with the growth of smart TVs and will only reach 46 percent this year. In contrast, usage via smartphones is declining this year, landing four points lower at 40 percent. This is followed by tablets with 27 percent, streaming devices with 12 percent and game consoles with 6 percent.

Time-shifted TV is the most important advantage of TV streaming for the Swiss

For 42 percent of Swiss TV streaming users, and thus for the majority, time-shifted TV is the most important advantage of TV streaming services. With an increase of six percentage points, this advantage grew the most in comparison with the others. The previously most important advantage, its availability on multiple devices, is close behind in second place with 41 percent. The ability to view TV while traveling remains in third place with 35 percent. It is followed by the advantage of saving money compared with other offerings (32 percent) and ease of installation (29 percent).

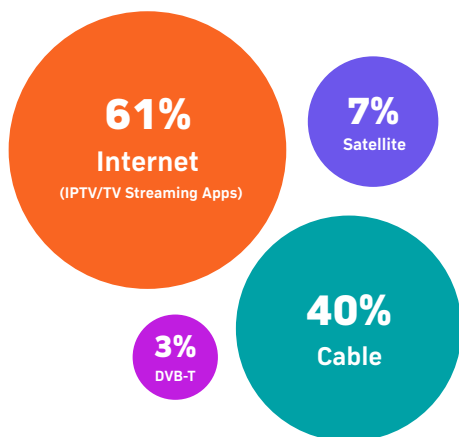
French-speaking TV streaming users rate time-shifted TV the lowest. For just 29 percent, it represents an advantage over other TV offerings. For German speakers, on the other hand, the figure is significantly higher at 47 percent. There is also a big difference when it comes to watching TV while traveling. For German-speaking TV streaming users, this is an advantage for just 32 percent, compared with 41 percent of French-speaking users.

Best regards,



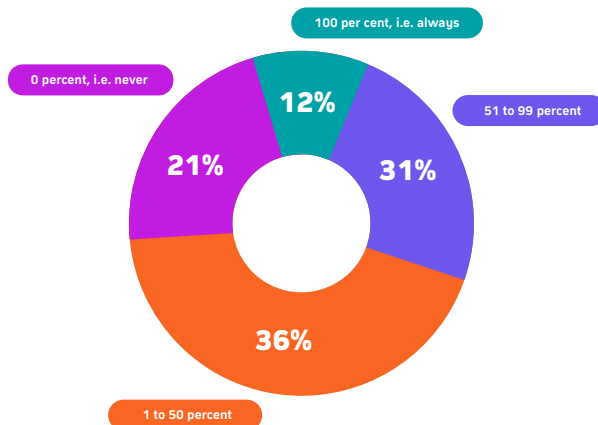
Jörg Meyer
Chief Commercial Officer at Zattoo

1 How do you receive TV in your household?



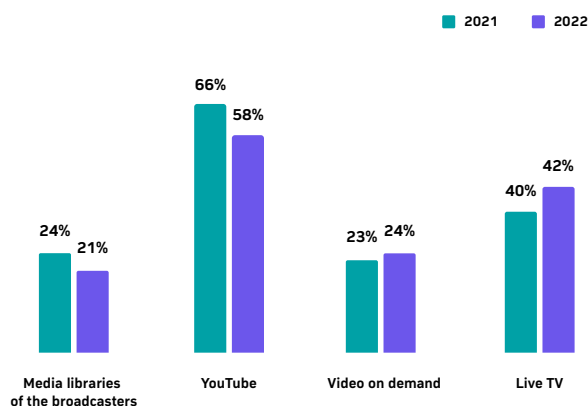
Basis unweighted: 800
Multiple answers possible

2 How much of your TV viewing time do you use TV streaming services?



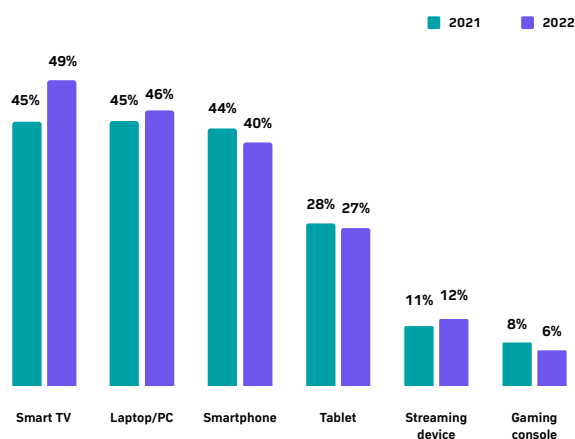
Basis: TV viewers at least 1 day per week
Basis unweighted: 715

3 Which television or video offerings do you use on the internet?



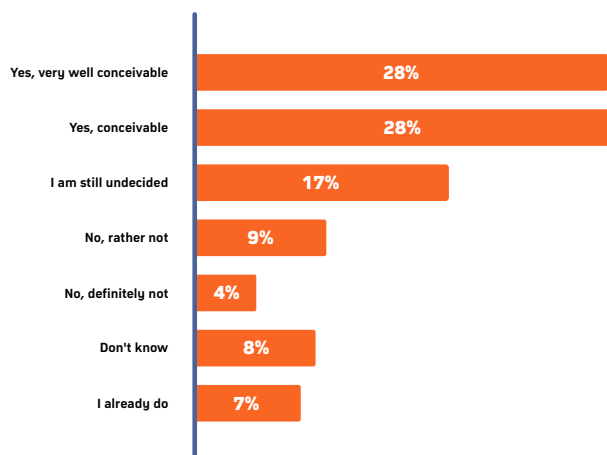
2022 Basis: Total*
2021 Basis: Users of at least 1% TV streaming services
2022 Basis unweighted: 800
2021 Basis unweighted: 651
Multiple answers possible
*Other basis due to changed query

4 On which devices do you watch TV via the internet?



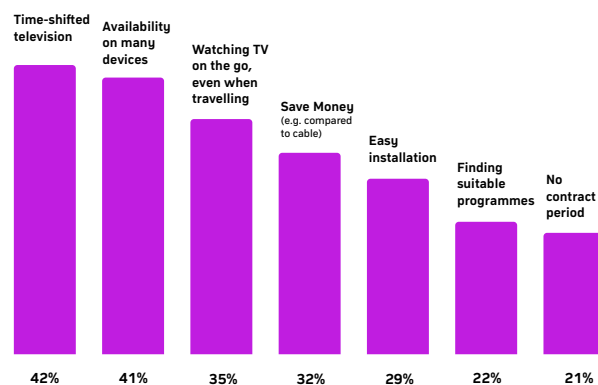
Basis: Users of at least 1% TV streaming services
2022 Basis unweighted: 568
2021 Basis unweighted: 651
Multiple answers possible

5 Can you imagine using your TV service exclusively via the Internet in the future?



Basis unweighted: 800

6 What are the most important advantages of TV streaming?



Basis: Users of at least 1% TV streaming services
Basis unweighted: 568
Multiple answers possible