

TV Streaming Report 2024

Switzerland

Dear Sir/Madam,

In 2024, the changes in the television viewing habits of the Swiss will continue, influenced by the ongoing global economic situation. While traditional cable reception continues to lose popularity, Internet reception remains the preferred source for watching TV programs. At the same time, the use of live TV has returned to pre-coronavirus pandemic levels. These developments are reflected in this year's TV Streaming Report, which paints a comprehensive picture of current TV and streaming behavior in Switzerland.

The report is based on an online survey conducted by YouGov, in which 1090 people in Switzerland took part between the 15th and 22nd of January 2024. The results were weighted and are representative of the Swiss population aged 16 and over. Zattoo has already been conducting this survey in Switzerland every year since 2015. The TV Streaming Report helps identify current developments in Internet and television usage, as well as in TV streaming. In this way, Zattoo aims to contribute to the discussion on the importance of TV streaming. This year, the following trends can be discerned for Switzerland:

TV reception via the Internet is still the most popular – reception via cable continues to fall

TV reception over the Internet remains the most widely used method of watching TV programs. When asked which reception channel they use to watch TV (multiple answers possible), 61 percent of respondents chose the Internet as their TV reception channel of choice. This is 6 percentage points fewer this year than in 2023, and thus back to the 2022 level. In parallel to this, TV reception via cable continues its downward trend, with a decline of 5 percentage points, meaning that only 30 percent of respondents said they used this reception mode at the beginning of 2024. The alternatives in the form of satellite and DVB-T reception remain stable, but at a low level, with 9 percent for satellite reception and 6 percent for DVB-T.

The use of live TV is back to its pre-pandemic level

Although the use of live TV has declined slightly this year and, at 38 percent, has yet to quite reach the level of previous years, it remains the leader compared to video-on-demand services (25%) and media libraries (17%). Especially in Western Switzerland, live TV is much more popular (44 percent) than in the German-speaking part of Switzerland (36 percent). At 17 percent, the use of media libraries has reached a new low, compared to 21 percent in 2023. For the first time this year, the participants were also asked about their interest in linear special-interest channels, so-called FAST broadcasters. Over a third (38%) stated here that they can imagine watching this kind of ad-supported TV content in the future, reflecting the Swiss population's openness to innovative TV formats.

TV streaming is still preferred on the big screen

TV streaming continues to enjoy great popularity, especially on TV sets. More than two-thirds of respondents (71%) watch TV streaming services during their TV viewing time, with smart TVs once again this year being the preferred device for this. About half (49%) of the respondents prefer smart TVs to streaming TV content, making these much more popular than laptops, PCs, or mobile devices. The latter, in particular, are seeing a significant decline in 2024; only one in four (24%) use a tablet, a loss of 7 percentage points compared to the previous year, and the use of smartphones has sunk by 4 percentage points to 43 percent. This suggests that other forms of consuming media are being favoured over TV streaming via mobile devices. The use of the Internet via laptops and PCs also continues to show a declining trend: from 42 percent in 2023 to 39 percent this year, which marks a decline of over 20 percent since 2020.

The economic situation continues to influence streaming subscriptions

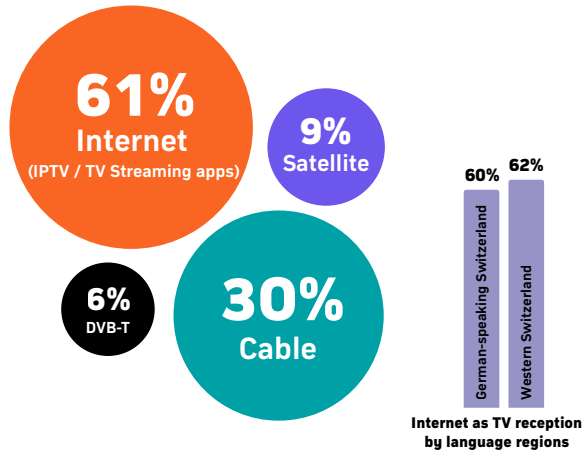
In view of the tense economic situation worldwide, one in five respondents (21%) in Switzerland has already canceled a streaming subscription in the last year. This is an increase of 8 percentage points compared to the previous year. Among those who have canceled a subscription, around half (49%) have switched to a cheaper offer, while one in four (25%) have moved over to a free offer. On the other hand, another 21 percent opted out of alternative services altogether.

Best regards,



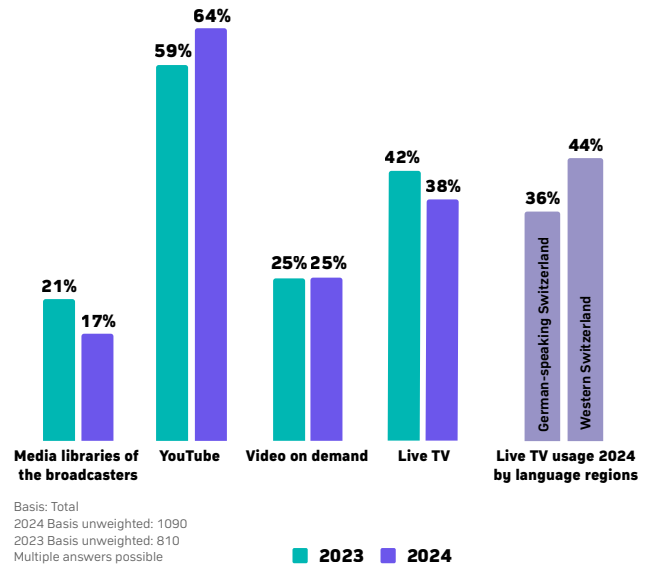
Jörg Meyer
Chief Commercial Officer

1 How do you receive TV in your household?



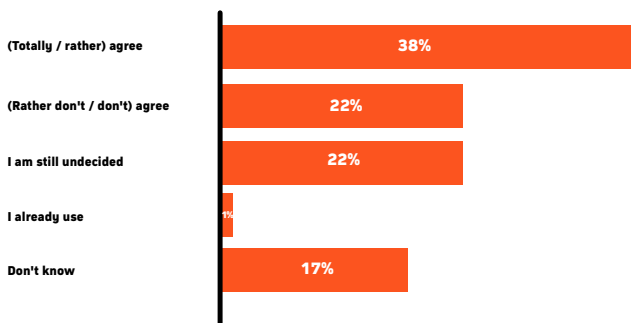
Basis: Total
Basis unweighted: 1090
Multiple answers possible

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



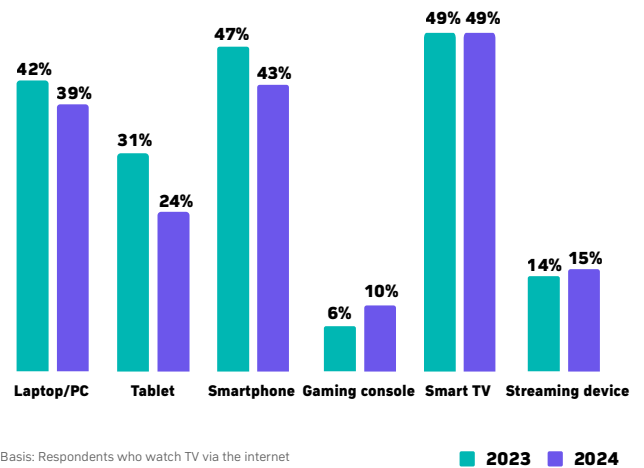
Basis: Total
2024 Basis unweighted: 1090
2023 Basis unweighted: 810
Multiple answers possible

3 Can you imagine watching so-called FAST channels in the future?



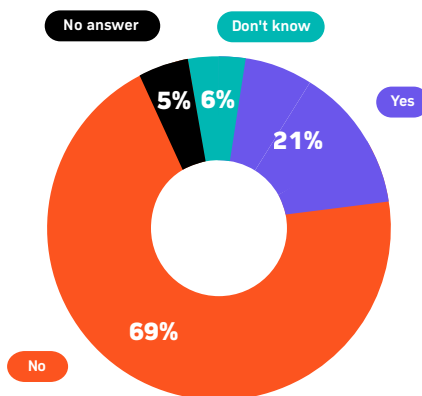
Basis: Total
Basis unweighted: 1090

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



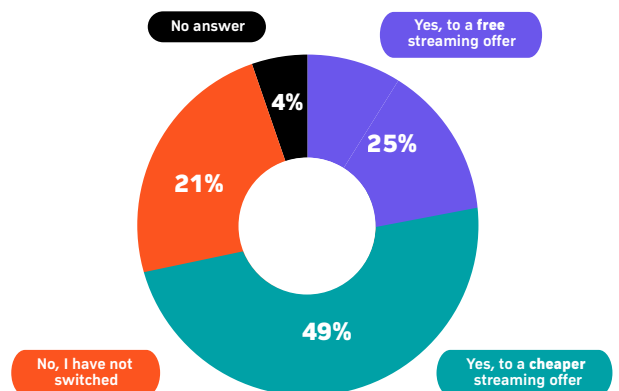
Basis: Respondents who watch TV via the internet
2024 Basis unweighted: 801
2023 Basis unweighted: 592
Multiple answers possible

5 Have you already cancelled a streaming subscription due to the current economic situation?



Basis: Total
Basis unweighted: 1090

6 Have you switched to cheaper or free offers due to the current economic situation?



Basis: Respondents who have cancelled a streaming subscription
Basis unweighted: 225