mediapulse

Big Screen Data 2024

Report on the distribution and use of TV sets in Switzerland

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AG für Medienforschung
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1 From TV set to big screen

The TV set (a.k.a. the television) owes its name to the fact that it was invented for the reception of TV programmes and for a long time was used exclusively for this purpose. At the latest with the spread of VHS recorders, gaming consoles and screen text services, TV programme providers were confronted with offers that also forced their way onto the TV set and thus competed with the exclusive claim of TV content on this device category. However, the success of this competition was limited and remained so even as the options for peripheral devices became more differentiated.

With the spread of the internet as a digital distribution platform, the situation for TV programme providers changed fundamentally and on two different levels. On the one hand, it gave them the opportunity to make their programmes available not only on conventional TV sets, but also on smartphones, tablets and PCs ("watching television without TV device"). On the other hand, digital networking has made it possible for TV sets, now labelled with terms such as Smart TV, Connected TV or simply Big Screen, to be populated with moving image content that does not originate from traditional TV providers but has its origins in the digital world ("TV devices without TV content").

To be able to observe this change in the function of the classic TV set, Mediapulse is bundling empirical findings from its TV research on the distribution and use of TV sets in Switzerland as "Big Screen Data". On the one hand, this Big Screen Data provides an integral and data-based insight into the relevance of what remains the most important end device for the consumption of TV programmes for TV broadcasters and their marketers. On the other hand, the Big Screen Data allows TV broadcasters to monitor moving image offerings that are also pushing onto the big screen and competing with TV offerings there.

2 The data basis

Two different data sources serve as the basis for "Big Screen Data":

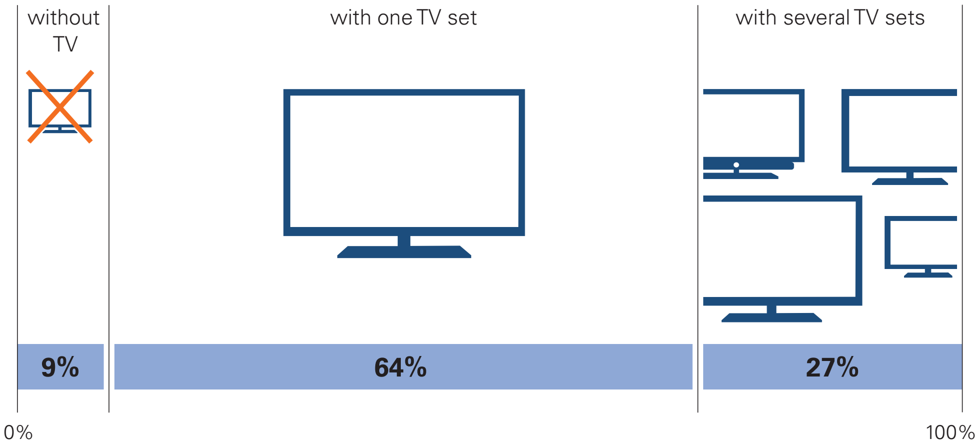
- Information on the distribution of big screens in private households in Switzerland is provided by the Mediapulse Establishment Survey Data, an annual survey of 12'000 households identifying the technical equipment of Swiss households for the reception and usage of TV and radio programmes since 2008.
- Information on the content used on big screens is provided by the Mediapulse TV Data based on the panel continuously measuring TV content usage second by second since 2013, and the usage of non-TV offerings (Mediapulse Streaming Data) since 2021.

The Big Screen Data Report is published annually.

The following report marks the start of a continuous publication of the Big Screen Data and presents initial findings on the status of big screens for the year 2024. The data sources further allow long-term monitoring of the respective phenomena, but this report only refers to longitudinal findings selectively and where appropriate.

3 The results

The distribution of big screens in 2024



Source: Mediapulse Establishment Survey Data, 2024, private households in Switzerland, 12,072 households

3.1 Distribution of big screens

At least nine out of ten private households in Switzerland had at least one traditional TV set in 2024. This proportion of TV households has remained stable since 2008, as has the average number of TV sets, which currently stands at 1.4 sets per TV household, a rather low figure by international standards.

In absolute figures, this means that more than 5 million TV sets are currently available in Swiss private households. Today, the term "TV set" almost invariably means "flat screen". This device category is found in 95 per cent of TV households. Four per cent of TV households have a TV projector and even the CRT screen is not extinct, but it is still very rare.

A total of more than 5 million TV sets are available in all Swiss private households.

3.2 TV reception on the big screens

In terms of TV programme reception, Switzerland has transformed from a cable to an IPTV country since 2008. During this time, the proportion of IPTV households has increased from just under 10 per cent to over 60 per cent of all TV households, while the proportion of households with cable reception has dropped from 80 per cent to less than 40 per cent in the same period. Further reception options such as satellite, DVB-T or OTT exist exclusively or alongside IPTV and cable, but their penetration is marginal.

Continued

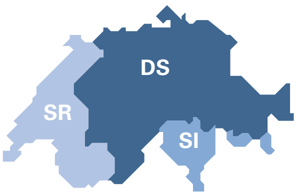
3 The results

3.3 Networking the big screens

Two out of three TV households have an internet-enabled big screen, but less than a third of households have connected it directly, i.e. without a set-top box, and are therefore ”connected” in the original sense of the word. One fifth of all TV households connect the TV to a DVD recorder or a gaming console and one in ten households have a Blu-ray recorder or the good old VHS recorder as a potential playback device.

3.4 Tabular overview of the distribution of big screen devices in 2024

The language regions:



Basis: All private households in %	CH	DS	SR	SI
HH without TV set	9	9	8	6
HH with one TV set	64	64	66	64
HH with several TV sets	27	27	26	30
Basis: All households with a TV set in %				
HH with flat screen	95	95	96	93
HH with IPTV reception	60	55	70	76
HH with cable reception	39	44	26	23
HH with internet-enabled TV set	62	62	63	54
HH with “connected” TV set	29	28	31	34
HH with DVD recorder connected to TV set	18	19	16	13
HH with games console connected to TV set	18	17	21	15
HH with Blu-Ray recorder	9	9	8	7

Source: Mediapulse Establishment Survey Data, 2024, private households in Switzerland and private households with TV, 12,072 and 11,026 households respectively

Continued

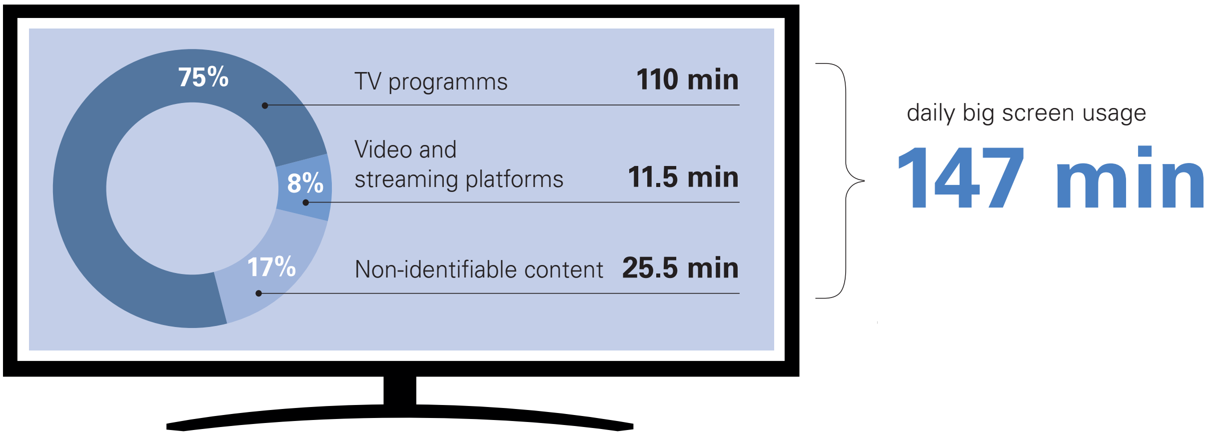
3 The results

The usage of big screens in 2024

3.5 Usage duration of big screens

In 2024, someone living in a Swiss TV household older than 3 years will spend 147 minutes a day in front of the TV set. This figure has been extremely stable over the last 10 years, fluctuating between 142 minutes in 2019 and 163 and 158 minutes in the coronavirus years 2020 and 2021. This stability in big screen usage can be seen in all three language regions of Switzerland, albeit at different levels in each. Currently, the daily usage time of the TV set is 138 minutes in German-speaking Switzerland, 163 minutes in French-speaking Switzerland and 189 minutes in Italian-speaking Switzerland.

3.6 Usage shares of TV programmes



Source: Mediapulse TV Data, households, usage on the TV set, CH, SD, Consumption Day, 1,990 households

Of the 147 minutes of daily big screen usage, 110 minutes or 75 per cent is spent watching TV programmes. According to the Swiss TV research convention, this includes linear or time-shifted viewing (up to 7 days after broadcast) of the 400 most relevant TV programmes. At 78%, the highest proportion of big screen TV programmes is in the Svizzera italiana, followed by 76% in the Deutschschweiz and 71% in the Suisse romande.

3.7 Usage shares of video and streaming platforms

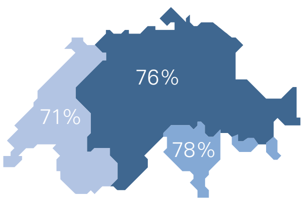
A further 11.5 minutes or 8 per cent of big screen usage is taken up by those video streaming offerings that can be clearly identified in current TV research. These include international providers such as YouTube, Netflix, Apple TV+, Amazon Prime, Disney+ and DAZN, which together account for 9.5 minutes, and the national web TV platforms of Quickline, Swisscom, Sunrise, Zattoo, and Teleboy, which together account for 2 minutes of usage per person per day. When assessing these figures, note that conventional TV programmes can of course also be used via the platforms mentioned. If these offerings comply with the above-mentioned TV research convention (up to 7 days after broadcast), their usage shares are not allocated to the platforms, but to TV usage (see section 3.2).

Continued

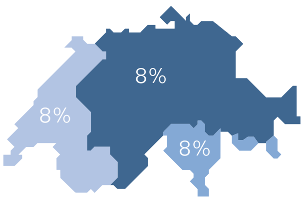
3 The results

This applies to live TV usage on the web TV platforms as well as to the viewing of TV programmes on YouTube within the first seven days of their broadcast on one of the 400 TV channels included. In addition to the moving image offerings, the Swiss TV research also measures the use of the 30 most important radio programmes via the big screen. However, with half a minute of listening time, the corresponding usage volume is negligible.

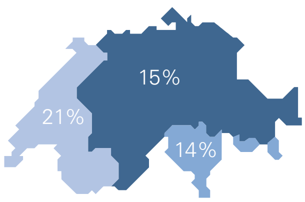
Share of big screen usage per language region



TV programmes



Video and streaming platforms



Non-identifiable content

3.8 Share of use of non-identifiable content

At least 25 minutes or 17 per cent of usage time on the big screen cannot currently be identified and allocated by TV research. On the one hand, it can be assumed that this is also TV usage but is not identified as such due to the currency definition of TV research. This could be the consumption of channels that are not referenced for audiomatching or the on-demand use of TV programmes that were broadcast more than 7 days ago and are either accessed via the corresponding media libraries or via private recording storages. On the other hand, the connected peripheral devices suggest that the big screen can of course also be used for gaming or for the consumption of commercially or privately available film storages. Finally, it cannot be ruled out for now that there are offerings in the confusing world of streaming platforms that are relevant on Swiss big screens but are not yet included in the study.

3.9 Tabular overview of big screen utilisation in 2024

Share in per cent	**CH**	**DS**	**SR**	**SI**
Daily big screen usage in minutes	147	138	163	189
Share of big screen usage in %				
TV programmes	75	76	71	78
Video and streaming platforms	8	8	8	8
Non-identifiable content	17	15	21	14

Source: Mediapulse TV Data, households, usage on the TV set, CH, DS, SR and SI, Viewing Time, Consumption Day, 1,990, 1,608, 638 and 291 households

Further information

About Mediapulse

As an independent industry organisation, Mediapulse is charged with collecting data on the consumption of radio and TV programmes in Switzerland. This data is considered official currency and is used by broadcasters and programme makers, the advertising industry, government agencies and for research.

As a company with a strong practical focus, Mediapulse seeks to support the Swiss electronic media and advertising market with research services and data products. Modern systems and constant innovations ensure that changes in the consumption of audiovisual media can also be mapped.

Mediapulse stands for a neutral, independent, transparent and scientific approach to media research and is under the supervision of DETEC (OFCOM). A large part of the market is represented on the Board of Directors of Mediapulse AG and the Board of Trustees of the Mediapulse Foundation.

Find out more at: www.mediapulse.ch

Any questions?

Richard Blatter
Sr. Partner Relations Manager
richard.blatter@mediapulse.ch
+41 58 356 47 60