

# Mediapulse Big Screen Data



**Distribution and use of  
TV sets in Switzerland**

# Contents

- 1 Data sources
- 2 Big screens in private households
- 3 TV viewing on big screens
- 4 Non-TV viewing on big screens



# Contents

1

## Data sources

2

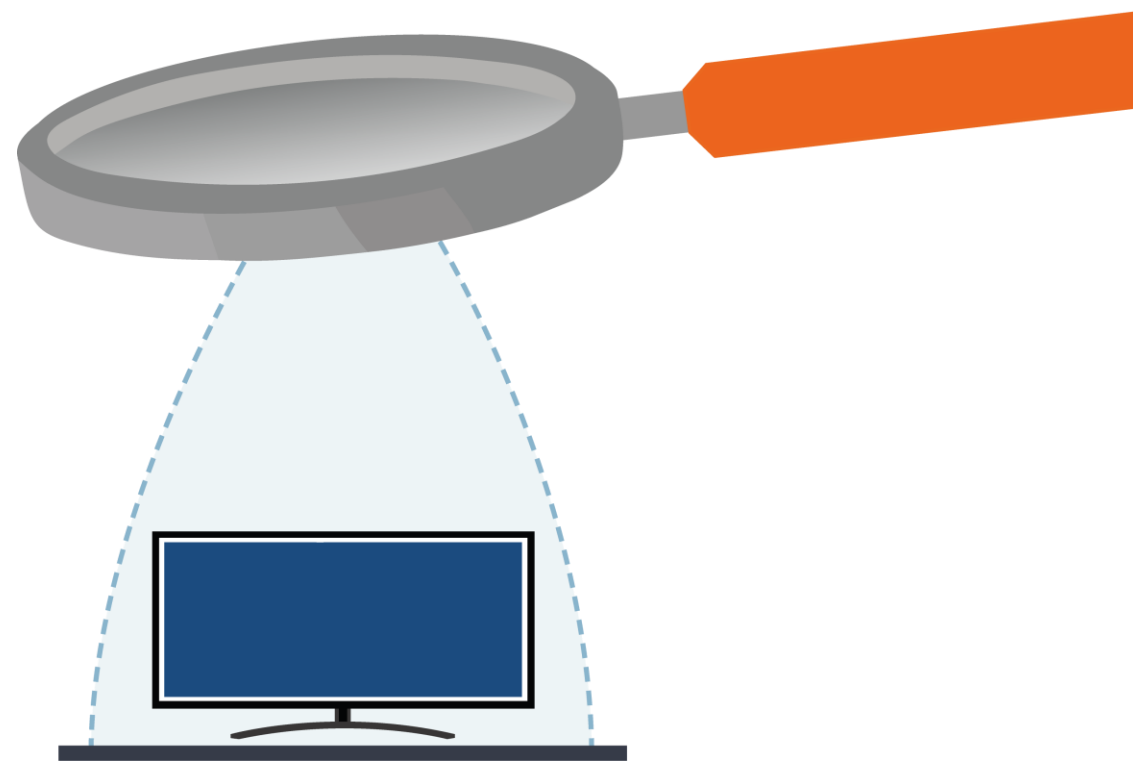
Big screens in private households

3

TV viewing on big screens




4

Non-TV viewing on big screens



# Data sources used for Mediapulse Big Screen Data

Further information at: [mediapulse.ch/products](https://mediapulse.ch/products)

Research question	Study	Universe	Method	Sample
 Big screens in private households	Mediapulse Establishment Survey Data	Swiss private households	Survey	Approx. 12'000 interviews per year
 TV viewing on big screens	Mediapulse TV Data	People aged 3+ years in TV households	Technical measurement via People Meter	Approx. 4'500 people per day
 Non-TV viewing on big screens	Mediapulse TV streaming data	People aged 3+ years in TV households	Technical measurement via Router Meter	Approx. 4'500 people per day

# Contents



1

Data sources

2

## Big screens in private households

3

TV viewing on big screens

4

Non-TV viewing on big screens

# Definition I

## Big Screen

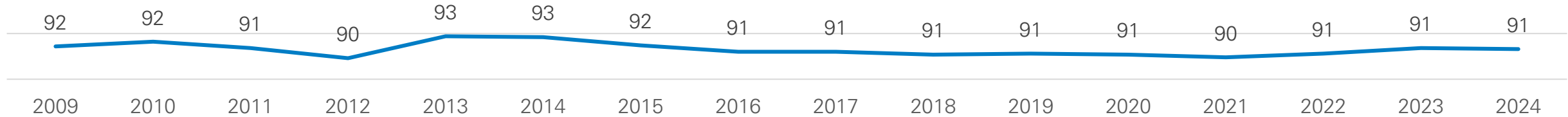
- Mediapulse TV research considers big screens to be
  - all TV sets
  - in Swiss private households,
  - that are used at least occasionally to watch TV programmes



# TV sets in Swiss households since 2009

Proportion of households with TV set and number of TV sets per TV-HH stable over 15 years

### HH with at least one TV set (TV-HH) in per cent



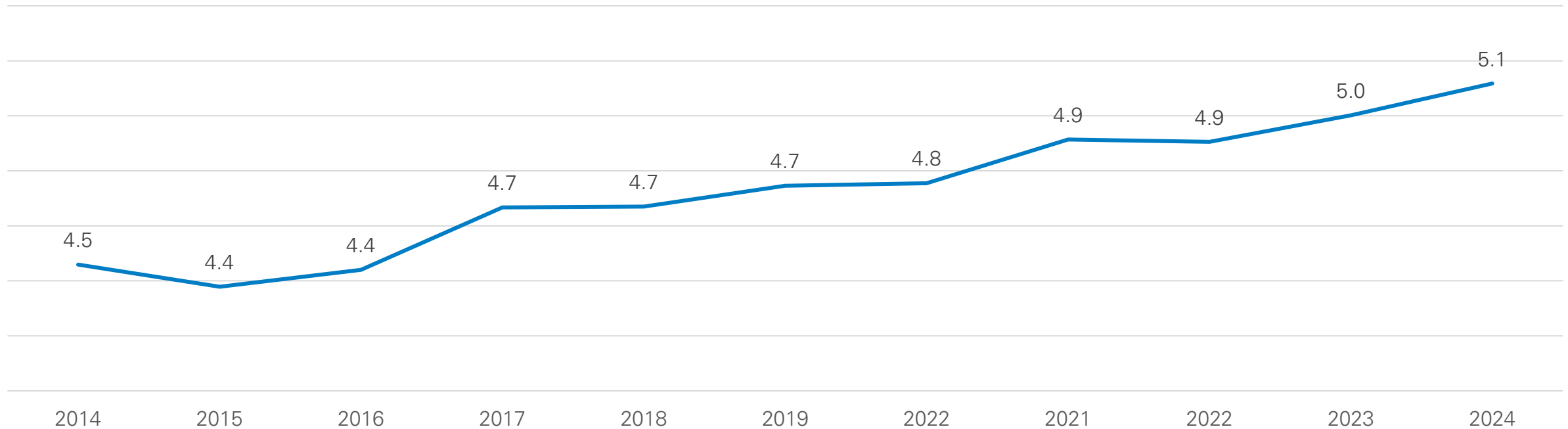
### Number of TV sets per TV-HH



# Number of TV sets since 2014

Steady increase over 10 years due to growth of total population

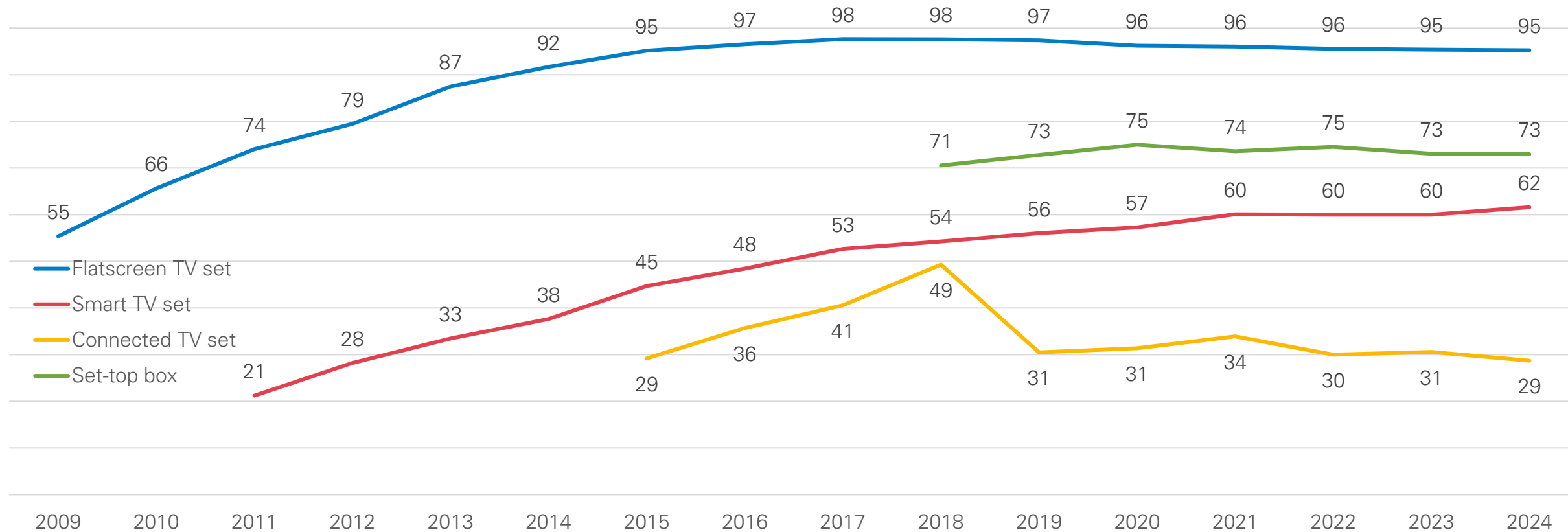
**Absolute number of TV sets in private households in millions  
(Mediapulse estimates)**



# Selected TV set features since 2009

Two thirds of TV households have an internet-enabled TV set

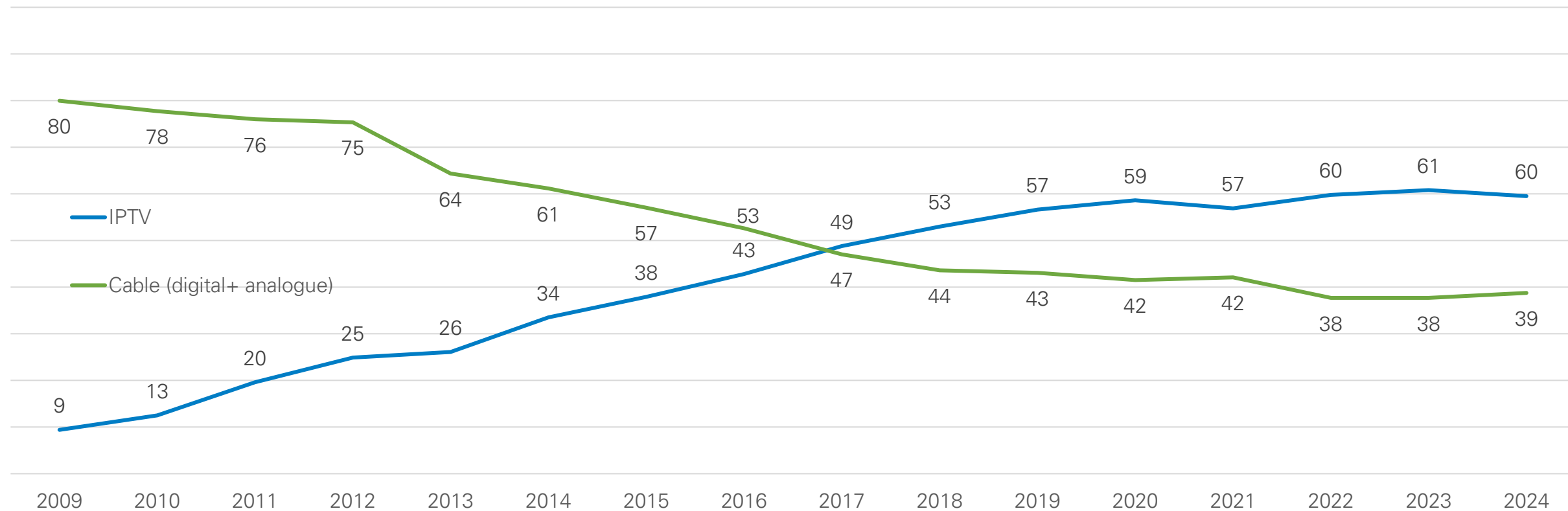
## Features of TV sets (share of TV-HH in per cent)



# Reception types since 2009

IPTV and cable are dominating

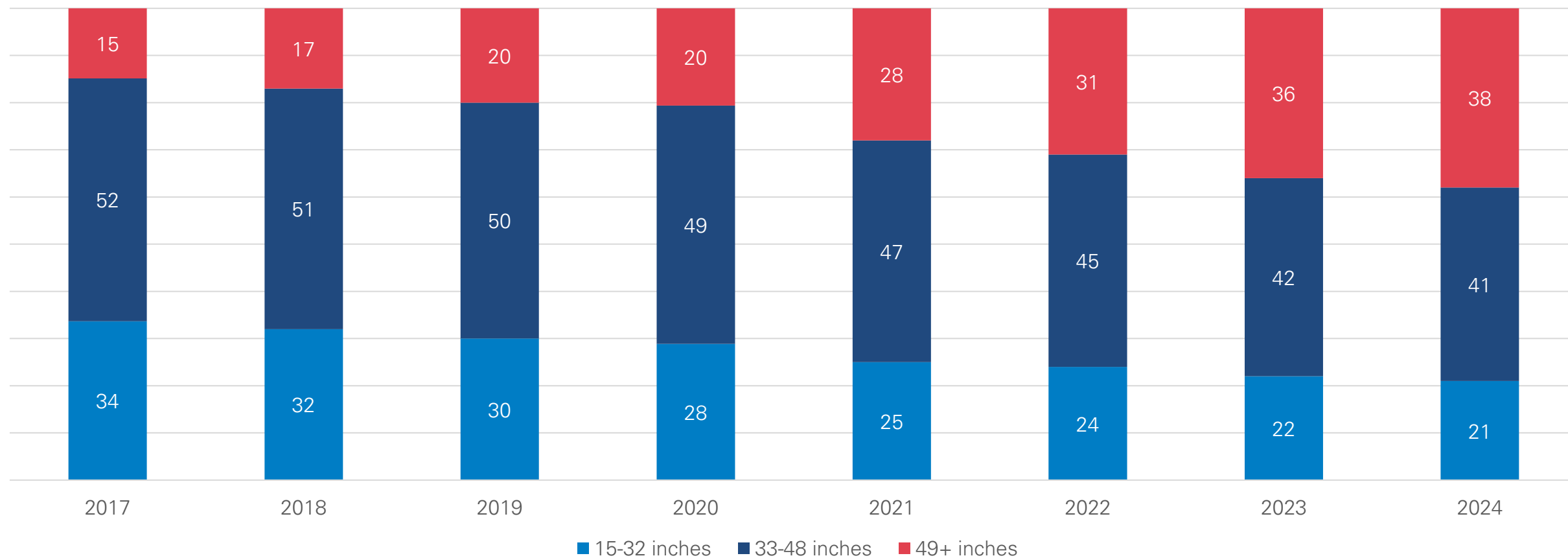
## TV reception types (share of TV-HH in per cent)



# Screen size since 2017

Big screens getting bigger

Share of TV sets in TV households by screen size (in per cent)



# Contents



1

Data sources

2

Big screens in private households

3

**TV viewing on big screens**

4

Non-TV viewing on big screens

# Definition II

## TV usage

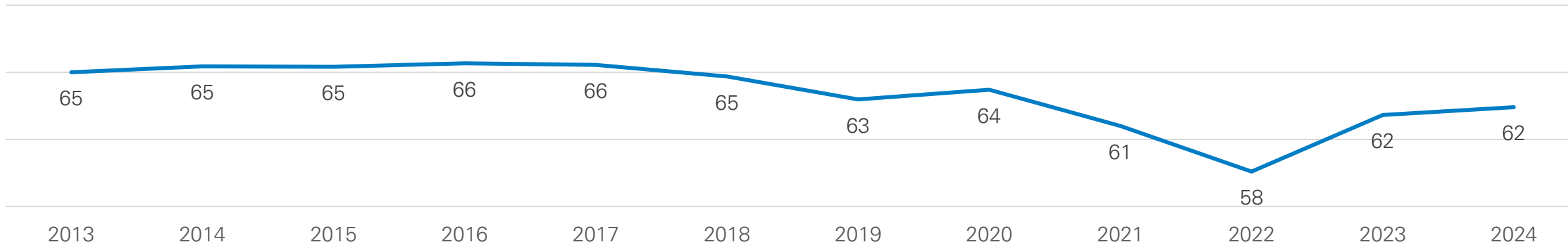
- According to the market definition of the TV currency, this includes
  - the linear and time-shifted use
  - of all TV channels,
  - which are covered as part of the Mediapulse TV research
- Time-shifted usage is defined as
  - the delayed use of TV programmes
  - within a period of seven days after broadcast
- The number of channels covered
  - includes around 400 different channels



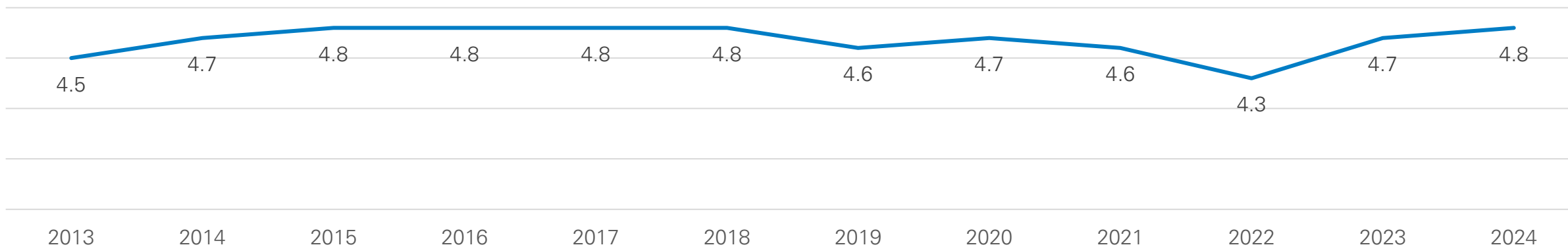
# TV net reach since 2013

Relative decline in TV audience with absolute growth

### NR TV relative (in per cent)



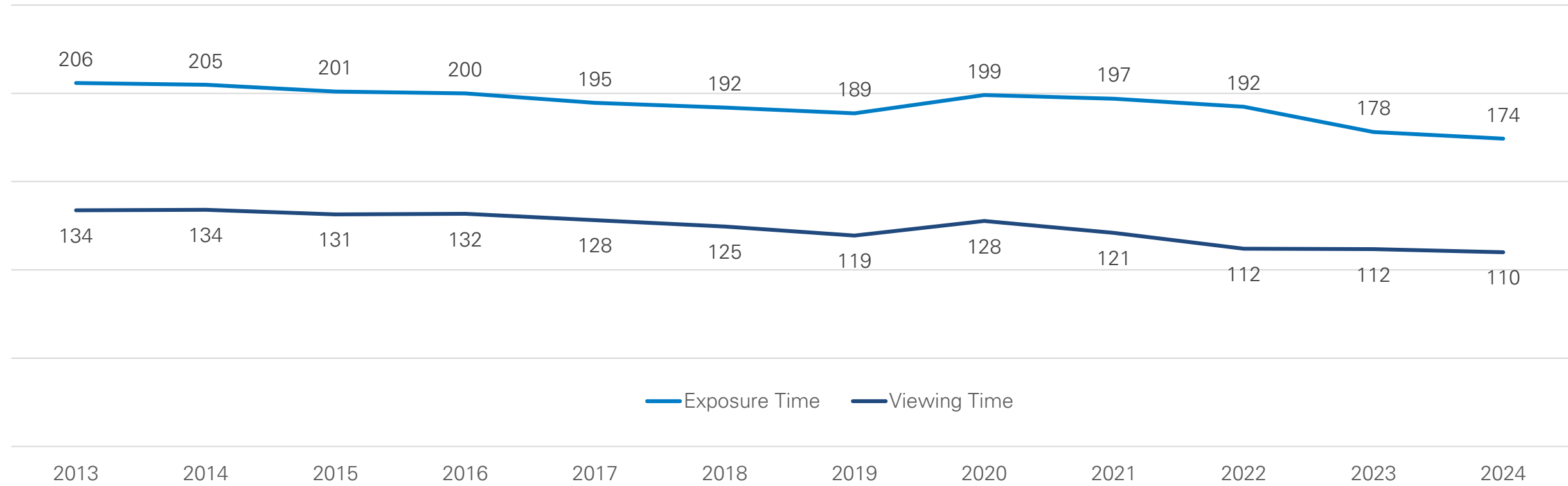
### NR TV absolute (in millions)



# TV viewing time since 2013

Decreasing time budget for TV usage

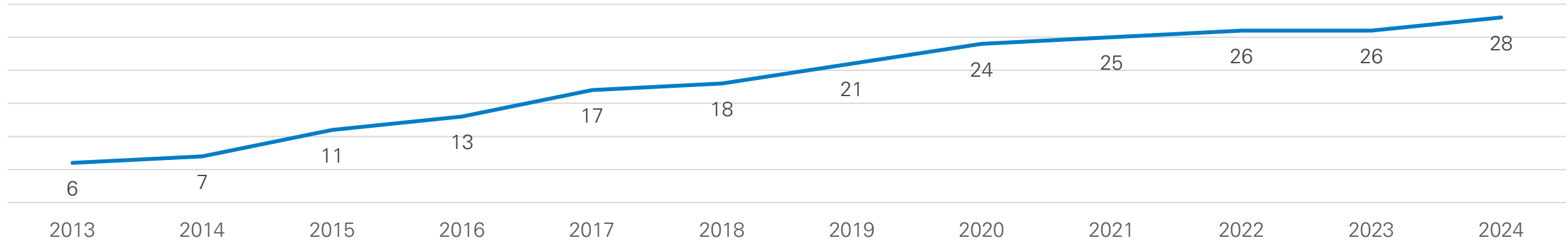
## Viewing Time and Exposure Time per day (in minutes)



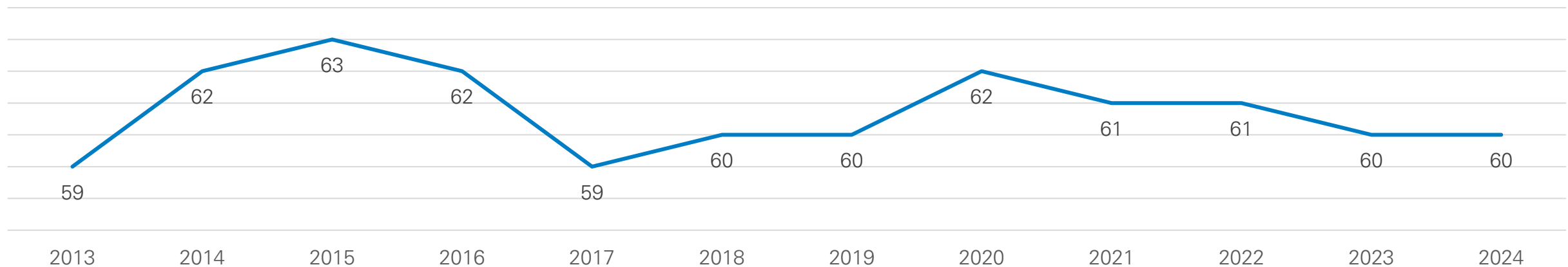
# Time-shifted TV viewing since 2013

Steady growth with a high and stable share of viewing on same day

## Share of time-shifted TV viewing (in per cent)



## Share of time-shifted TV viewing on broadcast day (in per cent)



# Contents

1

Data sources

2

Big screens in private households

3

TV viewing on big screens

4

**Non-TV viewing on big screens**



# Definition III

## Non-TV viewing

- Non-TV viewing is defined as
  - all viewing on big screen,
  - that cannot be categorised as TV viewing according to the definition of TV currency



# Classification of big screen viewing

TV vs. Non-TV viewing

## Big screen viewing



**TV viewing**



**Non-TV viewing**

identified



**Non-TV viewing**

not identified

Linear TV  
(Live)

Time-shifted  
TV  
(Overnight +7)

International  
video and  
streaming  
platforms

National  
Web TV  
platforms

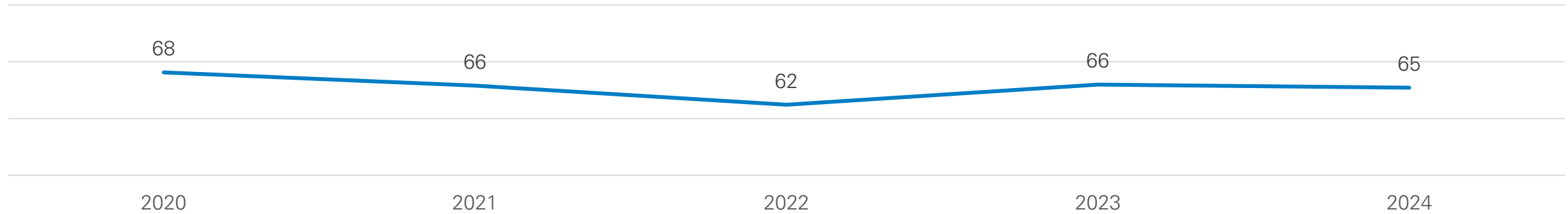
TV not  
included in  
TV currency

games,  
recordings,  
other platforms,  
uncovered  
viewing, ect.

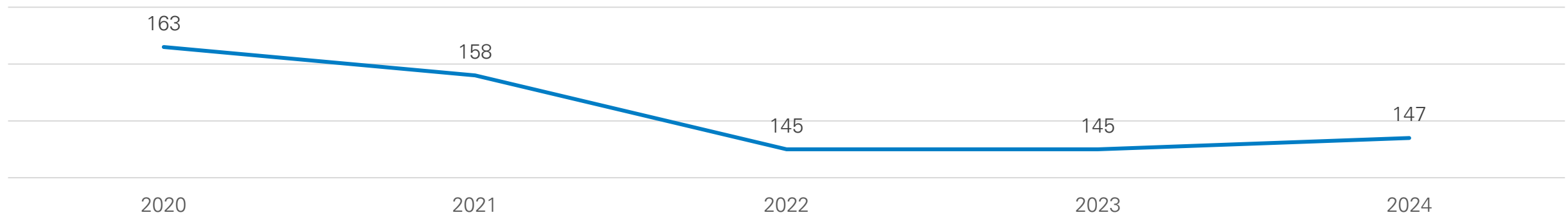
# Big screen audience and big screen viewing since 2020

Stable reach and declining usage volume after corona peak

### NR big screen (in per cent)



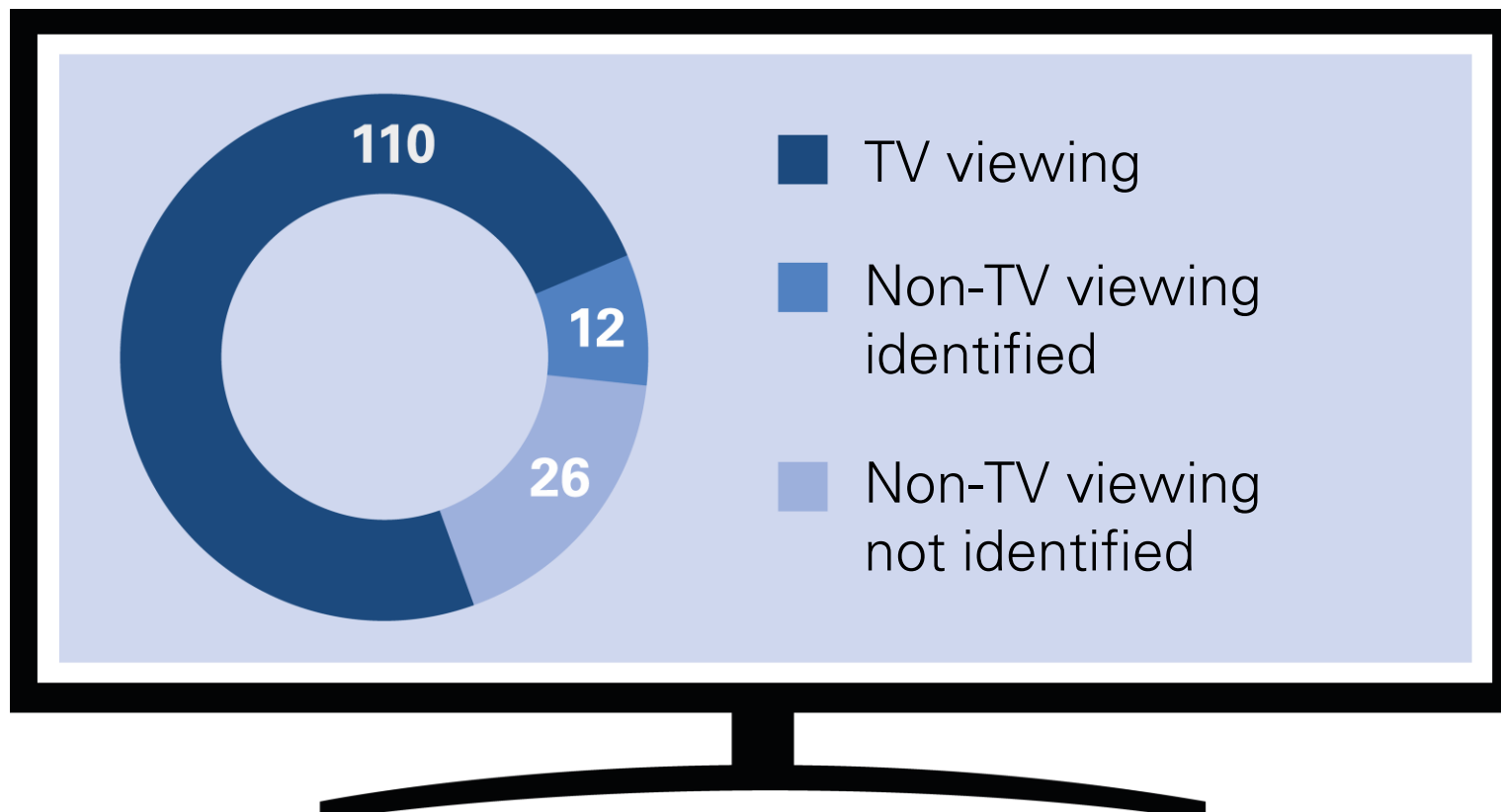
### Viewing Time big screen (in minutes)



# Quantification of big screen viewing

Daily viewing duration 2024

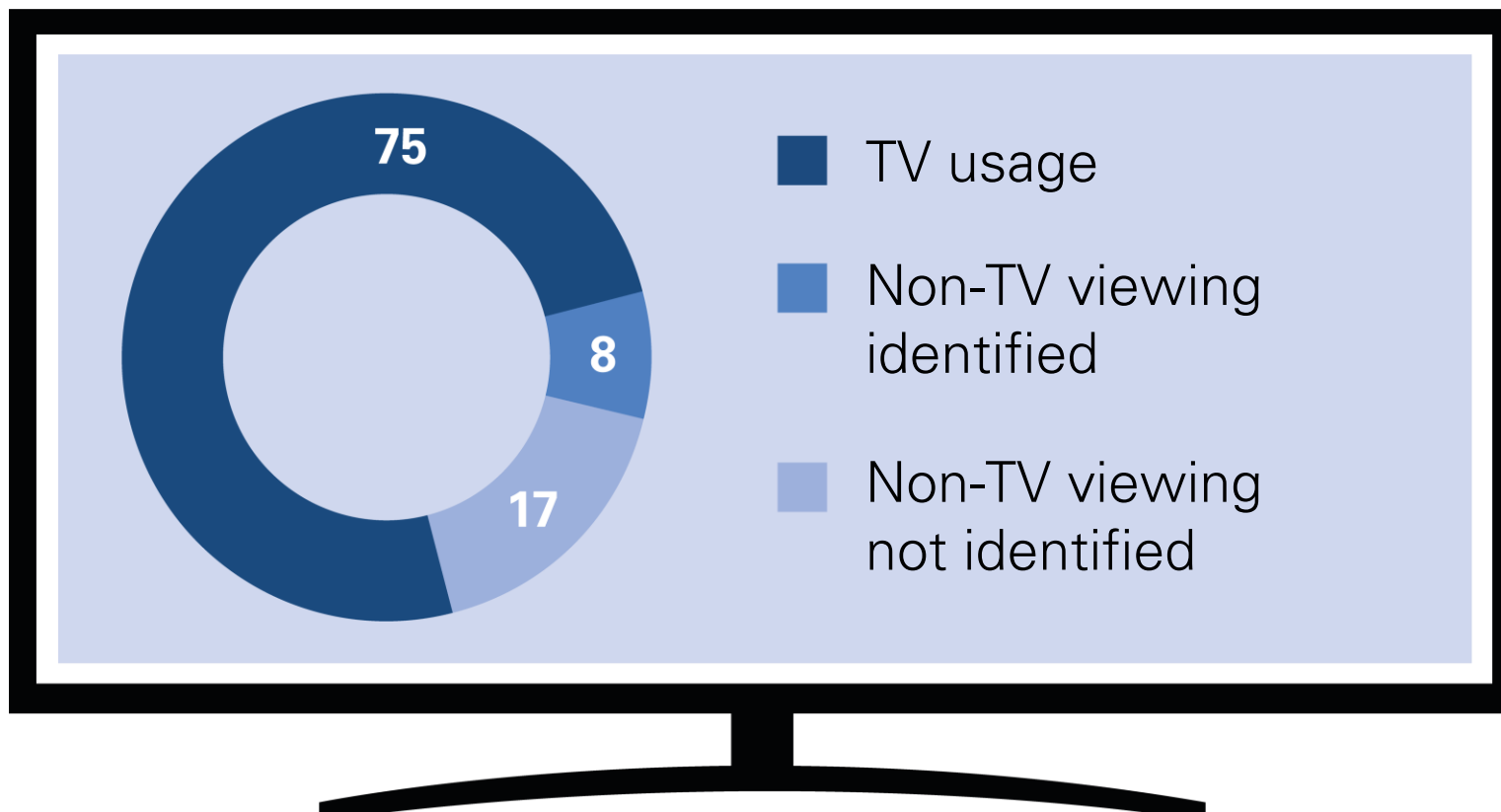
Breakdown of big screen viewing (in minutes per day)



# Quantification of big screen viewing

Market Shares 2024

Breakdown of big screen viewing (in per cent)



# Mediapulse Big Screen Data

## Conclusion

### **Big screens in private households**

- At 90 per cent, the proportion of private households with a TV set has remained stable over the last 15 years, as has the average figure of 1.4 TV sets per TV household. Due to population growth during this time, the absolute number of TV sets in private households has increased and is currently likely to be over 5 million.
- Following dynamic developments from 2009 to 2019, there have also been signs of stabilisation in the technical features of TV sets since 2020. This applies to TV reception types as well as to connection to the internet.

### **TV viewing on big screens**

- While the number of people who consume TV programmes on the big screen per day has remained stable, less time is spent watching TV today than ten years ago.
- Over the same period, the proportion of time-shifted viewing in total TV usage has steadily increased.

### **Non-TV viewing on big screens**

- At least 75% of total big screen viewing in 2024 can be attributable to the consumption of TV programmes. Just under a third of the remaining non-TV viewing can be attributed to national or international video and streaming platforms.



# MERCI

Questions always welcome: [richard.blatter@mediapulse.ch](mailto:richard.blatter@mediapulse.ch)

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