

# Switzerland

## Switzerland: key data

Population	7.8m
TV households	3.3m
DVD households (penetration)	89.4%
Blu-ray households (penetration)	7.2%
<b>Distributors revenues from physical video software</b>	Sfr 248.1m / € 179.3m
Comparison with 2009 (local currency)	+0.3%
DVD/ Blu-ray Disc split	€ 154.6m / € 24.8m
Video software rental/retail split (%)	1/99
<b>Consumer spending on physical video software</b>	Sfr 320.5m / € 231.7m
Comparison with 2009 (local currency)	+0.1%
DVD/ Blu-ray Disc split	€ 203m / € 28.7m
Video software rental/retail split (%)	3/97

## DVD and Blu-ray market

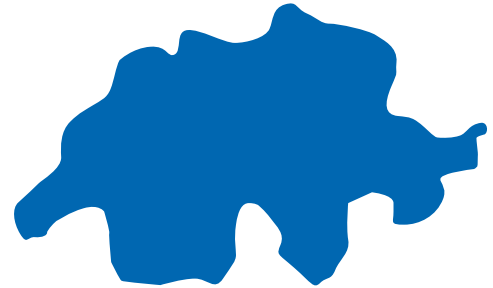
The Swiss video market performed better than most European markets in 2010, for the second consecutive year. Total consumer spending on DVD and Blu-ray Disc (retail and rental) was stable at Sfr 322.1 million (EUR 232.8 million) in 2010.

The number of DVD player/recorder households was also stable at 2.98 million in 2010. Blu-ray Disc (BD) player households increased by 122 per cent to 240,000. This led to an increase of BD player penetration of TV households by 7.2 per cent. Branded Profile 2.0 BD players (i.e. internet capable players) of medium specification cost Sfr 150-200 (EUR 118-157).

The Swiss video market has been aided by the relative strong economy. Unlike its neighbours, the country did not enter into recession in 2008-2010, although economic growth slowed down. The unemployment rate remained low at 3.4 per cent in March 2011.

## Retail

The number of DVDs sold to consumers declined by just 2.1 per cent to 12.8 million in 2010. The average consumer price of a DVD fell by 2.8 per cent to Sfr 21.20 (EUR 15.33). As a result, consumer spending on DVD declined by 4.8 per cent to Sfr 270.9 million (EUR 195.9 million). Blu-ray also performed better in Switzerland than in most other European territories. The number of BDs sold to consumers increased by 103.2 per cent to 1.32 million. The average consumer price of a BD reached Sfr 29.20 (EUR 21.11), a 12.8 per cent decline on 2009. Swiss consumer spending on the format increased by 77.2 per cent to Sfr 38.4 million (EUR 27.8 million) in 2010.



The total number of retail stores remained stable. The three leading chains are German consumer electronics retail chain MediaMarkt, Inter Discount and Manor.

## Rental

The Swiss DVD rental market experienced a double digit decline in 2010, with DVD rental transactions falling 25.8 per cent to 1.5 million. The average rental price was stable. As a result, consumer spending on DVD rental also declined by 25.8 per cent reaching Sfr 9.9 million (EUR 7.1 million). Meanwhile, Swiss consumers spent Sfr 1.3 million (EUR 930,000) on BD rental in 2010, an increase of 140 per cent.

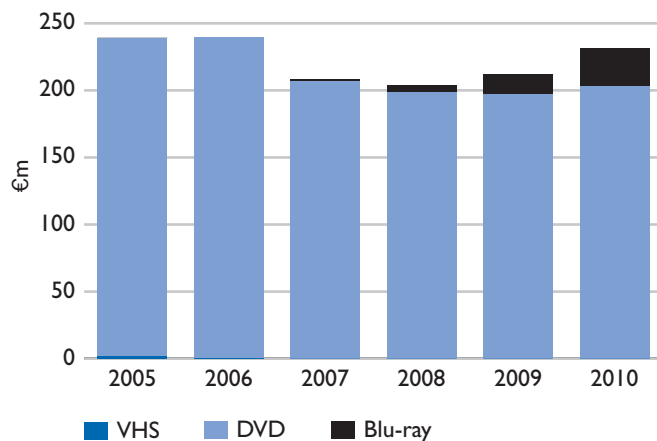
## Online distribution

Swiss telecommunications group Swisscom offered the only notable TV VoD service in 2010, via IPTV technology. Consumers had access to 11 digital retail or rental stores in 2010. Three of these were provided by local operators such as Swisscom. A number of international online movie providers are also available in the territory, such as Apple's iTunes and Microsoft's Zune on Xbox360.

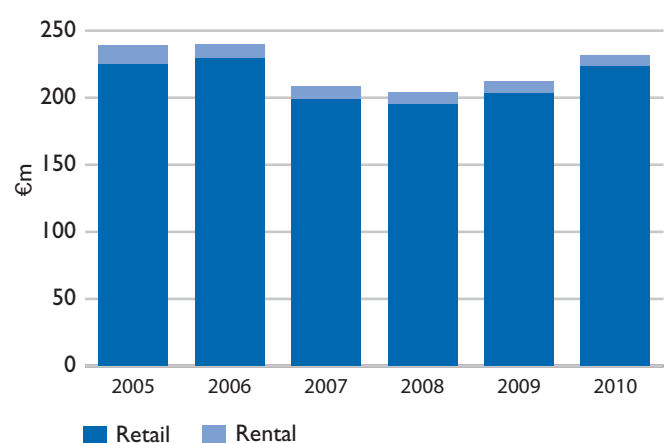
*This commentary was provided by IHS Screen Digest.*

## Video market: Switzerland

### Consumer spending by format



### Consumer spending by sector



		2005	2006	2007	2008	2009	2010	10/09
<b>EXCHANGE RATES</b>								
Exchange rate: Euro   =	Sfr	1.55	1.57	1.64	1.59	1.51	1.38	
Exchange rate: \$   =	Sfr	1.25	1.25	1.20	1.08	1.09	1.04	
Exchange rate: \$   =	Euro	0.80	0.80	0.73	0.68	0.72	0.75	
<b>GENERAL</b>								
Population	m	7.46	7.51	7.59	7.70	7.79	7.84	0.6%
Households	m	3.31	3.33	3.34	3.36	3.37	3.38	0.3%
<b>HARDWARE</b>								
TV households	m	3.3	3.3	3.3	3.3	3.3	3.3	0.4%
<b>DVD sector</b>								
DVD Video player/recorder households	m	2.029	2.435	2.707	2.836	2.981	2.984	0.1%
Penetration of TV households	%	62.3	74.3	82.2	85.7	89.7	89.4	
DVD console households	m	0.651	0.676	0.721	0.703	0.695	0.730	5.1%
Penetration of TV households	%	20.0	20.6	21.9	21.2	20.9	21.9	
<b>BD sector</b>								
BD standalone player households	m			0.001	0.026	0.108	0.240	122.2%
Penetration of TV households	%			0.031	0.770	3.250	7.191	
PS3 console households	m			0.061	0.133	0.204	0.293	43.8%
Penetration of TV households	%			1.9	4.0	6.1	8.8	

### Total video software market

		2005	2006	2007	2008	2009	2010	10/09
<b>TRADE LEVEL PHYSICAL VIDEO</b>								
Total revenues from video software	Sfr m	246.0	257.0	248.8	241.9	247.4	248.1	0.3%
Total revenues from video software	Euro m	158.9	163.3	151.4	152.4	163.8	179.3	9.5%
Total revenues from retail video	Sfr m	242.3	253.2	245.4	239.1	244.3	245.2	0.4%
Total revenues from retail video	Euro m	156.4	161.0	149.4	150.6	161.7	177.3	9.6%
Total revenues from rental video	Sfr m	3.8	3.7	3.4	2.9	3.2	2.9	-9.4%
Total revenues from rental video	Euro m	2.4	2.4	2.1	1.8	2.1	2.1	-1.1%

## Video market: Switzerland

		2005	2006	2007	2008	2009	2010	10/09
<b>CONSUMER LEVEL PHYSICAL VIDEO</b>								
Total spending on video software	Sfr m	370.2	377.2	343.0	323.7	320.2	320.5	0.1%
Total spending on video software	Euro m	239.1	239.7	208.8	203.9	212.0	231.7	9.3%
Total spending on retail video	Sfr m	348.3	360.5	326.5	310.0	306.4	309.3	1.0%
Total spending on retail video	Euro m	224.9	229.2	198.7	195.3	202.9	223.6	10.2%
Total spending on rental video	Sfr m	21.9	16.6	16.5	13.7	13.9	11.2	-19.4%
Total spending on rental video	Euro m	14.1	10.6	10.1	8.6	9.2	8.1	-12.0%

		2005	2006	2007	2008	2009	2010	10/09
<b>CONSUMER LEVEL DIGITAL VIDEO*</b>								
Total spending on digital video	Sfr m	0.0	0.1	0.2	0.1	0.2	0.5	204.5%
Total spending on digital video	Euro m	0.0	0.0	0.1	0.1	0.1	0.4	232.4%

		2005	2006	2007	2008	2009	2010	10/09
<b>CONSUMER LEVEL TVVOD**</b>								
Total spending on TVVOD	Sfr m	2.1	2.5	5.0	8.8	13.1	19.3	47.6%
Total spending on TVVOD	Euro m	1.3	1.6	3.0	5.5	8.7	13.9	61.1%

\*The purchase or rental of movies and TV series delivered over the open internet through transactional models (also known as EST, DTO, Internet VOD) or on a subscription basis.

\*\*The delivery of movies and TV content on a transactional (VoD/NVoD/PPV) basis via cable/satellite/IPTV services.

## Retail video market

		2005	2006	2007	2008	2009	2010	10/09
Outlets stocking retail video	no	822	822	822	822	822	820	
Retail chains with 10 or more outlets	no	5	5	5	5	5	5	
Kiosks stocking retail video	no							

<b>Trade level: DVD retail</b>								
Revenues from retail DVD	Sfr m	241.0	252.9	241.5	231.9	222.6	211.9	-4.8%
Revenues from retail DVD	Euro m	155.6	160.7	147.0	146.1	147.4	153.2	3.9%
Retail DVD shipped to trade	m	14.9	14.6	13.9	13.4	13.3	13.0	-2.3%
Average trade price	Sfr	16.19	17.33	17.40	17.30	16.70	16.28	-2.5%
Average trade price	Euro	10.45	11.02	10.59	10.90	11.06	11.77	6.4%
Number of titles released	no	3,000	2,880	2,784	2,736	3,010	2,880	-4.3%

<b>Trade level: BD retail</b>								
Revenues from retail BD	Sfr m			2.7	7.2	21.7	33.3	53.7%
Revenues from retail BD	Euro m			1.6	4.5	14.4	24.1	67.8%
Retail BD shipped to trade	m			0.12	0.29	0.76	1.34	76.3%
Average trade price	Sfr			22.91	24.79	28.48	24.82	-12.8%
<b>Average trade price</b>	Euro			13.94	15.61	18.85	17.94	-4.8%

<b>Consumer level: DVD retail</b>								
Spending on retail DVD	Sfr m	346.4	360.0	324.0	302.2	284.7	270.9	-4.8%
Spending on retail DVD	Euro m	223.7	228.8	197.2	190.4	188.5	195.9	3.9%
Retail DVD sold to consumers	m	14.1	14.3	13.6	13.1	13.1	12.8	-2.1%
Average consumer price	Sfr	24.49	25.17	23.82	23.01	21.80	21.20	-2.8%
Average consumer price	Euro	15.82	16.00	14.50	14.50	14.43	15.33	6.2%

<b>Consumer level: BD retail</b>								
Spending on retail BD	Sfr m			1.7	7.8	21.7	38.4	77.2%
Spending on retail BD	Euro m			1.0	4.9	14.4	27.8	93.4%
Retail BD sold to consumers	m			0.04	0.19	0.65	1.32	103.2%
Average consumer price	Sfr			41.67	41.31	33.50	29.20	-12.8%
Average consumer price	Euro			25.36	26.02	22.18	21.11	-4.8%

Rental video market

		2005	2006	2007	2008	2009	2010	10/09
Video rental outlets	no	300	300	300	290	290	277	
Rental chains with 10 or more outlets	no	2	2	2	2	2	2	
<b>Trade level: DVD rental</b>								
Revenues from rental DVD	Sfr m	3.7	3.7	3.4	2.8	2.7	1.9	-30.5%
Revenues from rental DVD	Euro m	2.4	2.4	2.1	1.8	1.8	1.4	-24.2%
Rental DVD shipped to trade	m	0.11	0.10	0.11	0.10	0.10	0.08	-25.8%
Average trade price	Sfr	33.58	36.05	31.65	29.39	26.33	24.65	-6.4%
Average trade price	Euro	21.69	22.91	19.26	18.51	17.43	17.82	2.2%
Number of titles released	no	450	432	408	403	444	384	-13.5%
<b>Trade level: BD rental</b>								
Revenues from rental BD	Sfr m			0.002	0.07	0.43	0.97	126.6%
Revenues from rental BD	Euro m			0.001	0.05	0.28	0.70	147.4%
Rental BD shipped to trade	m			0.0001	0.003	0.02	0.04	160.0%
Average trade price	Sfr			22.91	24.79	28.48	24.82	-12.8%
Average trade price	Euro			13.94	15.61	18.85	17.94	-4.8%
Number of titles released	no							
<b>Consumer level: DVD rental</b>								
Spending on DVD rental	Sfr m	21.5	16.6	16.5	13.6	13.3	9.9	-25.8%
Spending on DVD rental	Euro m	13.9	10.6	10.0	8.6	8.8	7.1	-19.0%
DVD rental transactions	m	3.3	2.6	2.6	2.1	2.1	1.5	-25.8%
Average rental price	Sfr	6.43	6.43	6.45	6.45	6.39	6.39	
Average rental price	Euro	4.15	4.09	3.93	4.06	4.23	4.62	9.2%
<b>Consumer level: BD rental</b>								
Spending on BD rental	Sfr m			0.032	0.131	0.538	1.285	138.8%
Spending on BD rental	Euro m			0.020	0.082	0.356	0.929	160.7%
BD rental transactions	m			0.005	0.020	0.084	0.201	138.8%
Average rental price	Sfr			6.45	6.45	6.39	6.39	
Average rental price	Euro			3.93	4.06	4.23	4.62	9.2%

Source: IHS Screen Digest/IVF

Population and household figures: Economist Intelligence Unit

Note: Distributor level excludes and consumer level includes VAT/sales tax