



The Swiss Media Landscape

Edition 2004

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Switzerland - Introduction

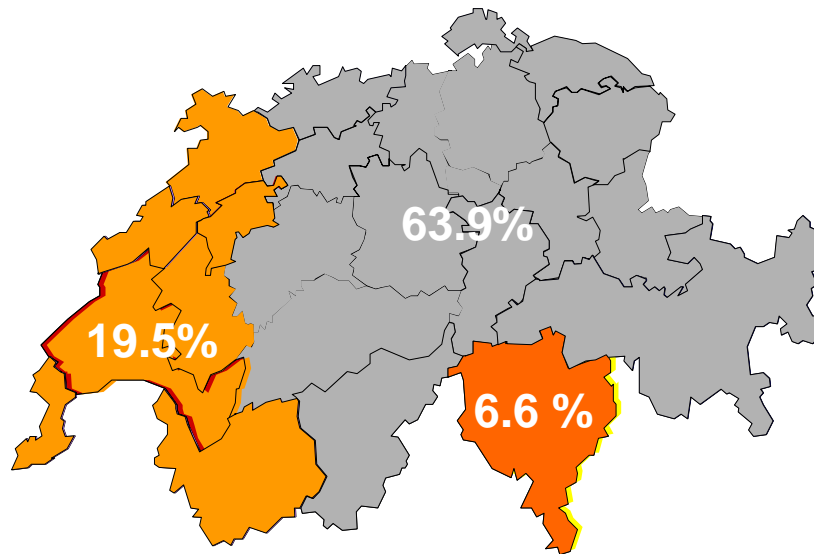
Geography and Demography

Introduction

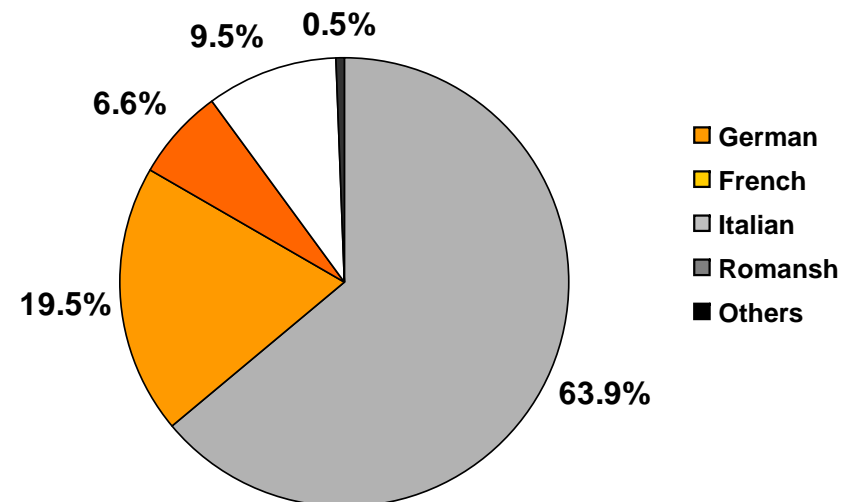
Switzerland is situated at the very heart of Europe, surrounded by its **five neighbouring countries** - Germany, France, Italy, Austria and the Principality of Lichtenstein.

Switzerland is a **highly service-oriented country**, at the crossroads of Europe, a **popular holiday destination**, **headquarter of international organisations** and one of the **key financial centres in the world**. It also has social and economic connections all around the world and is an important player on the international business scene

Switzerland's political structure is a federal system and we have recognized four national languages: **German, French, Italian and Romansh**.



The multilingual environment



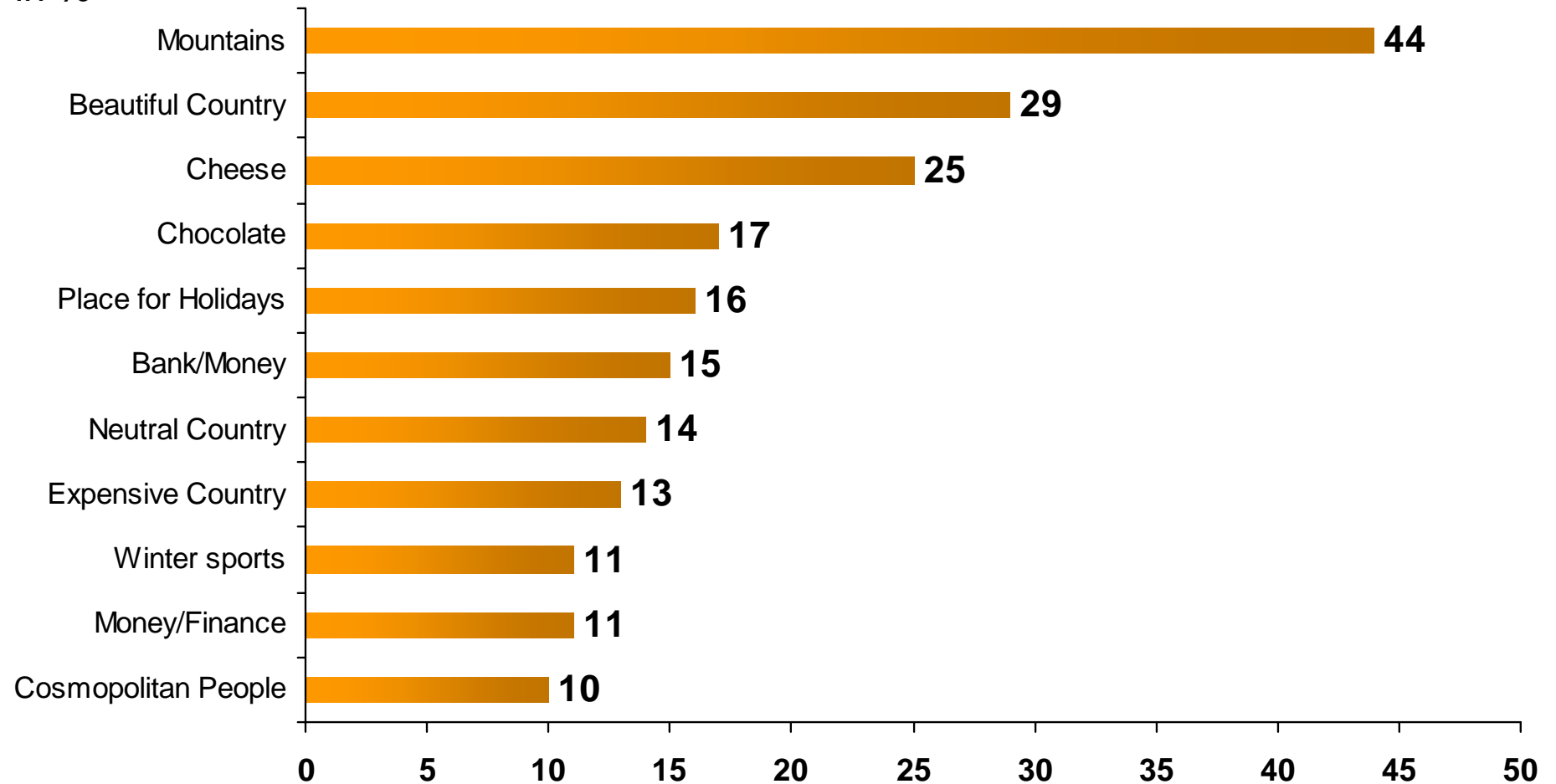
Source: Die Schweiz in Zahlen 2003 (UBS)

Associativity to Switzerland

Introduction

Spontaneous associativity of the German Population regarding Switzerland.

in %



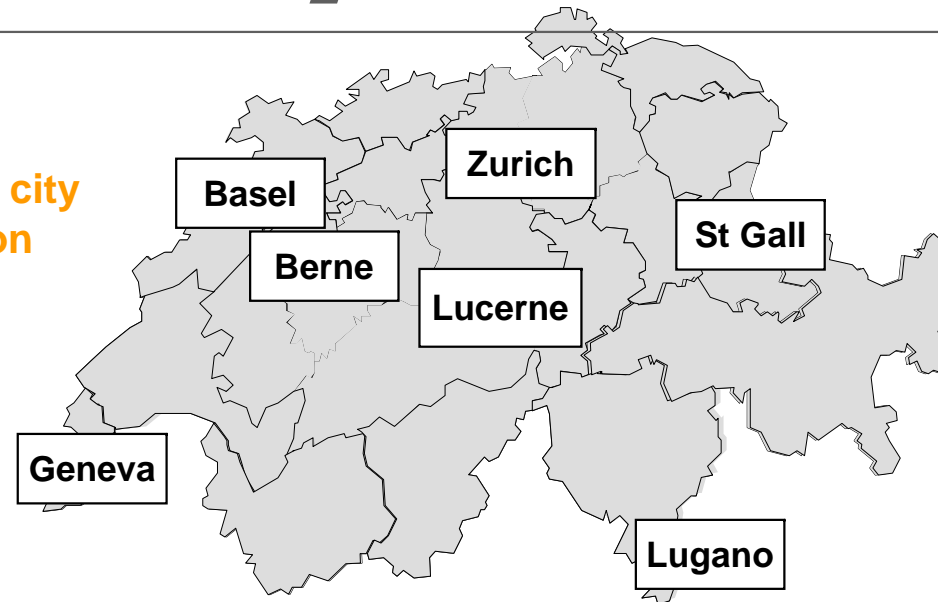
Random sampling total population: 1003 people

Source: Kommission Präsenz Schweiz

International comparison

Introduction

➔ 69% of the Swiss population live in a city or an agglomeration



Switzerland in an international comparison

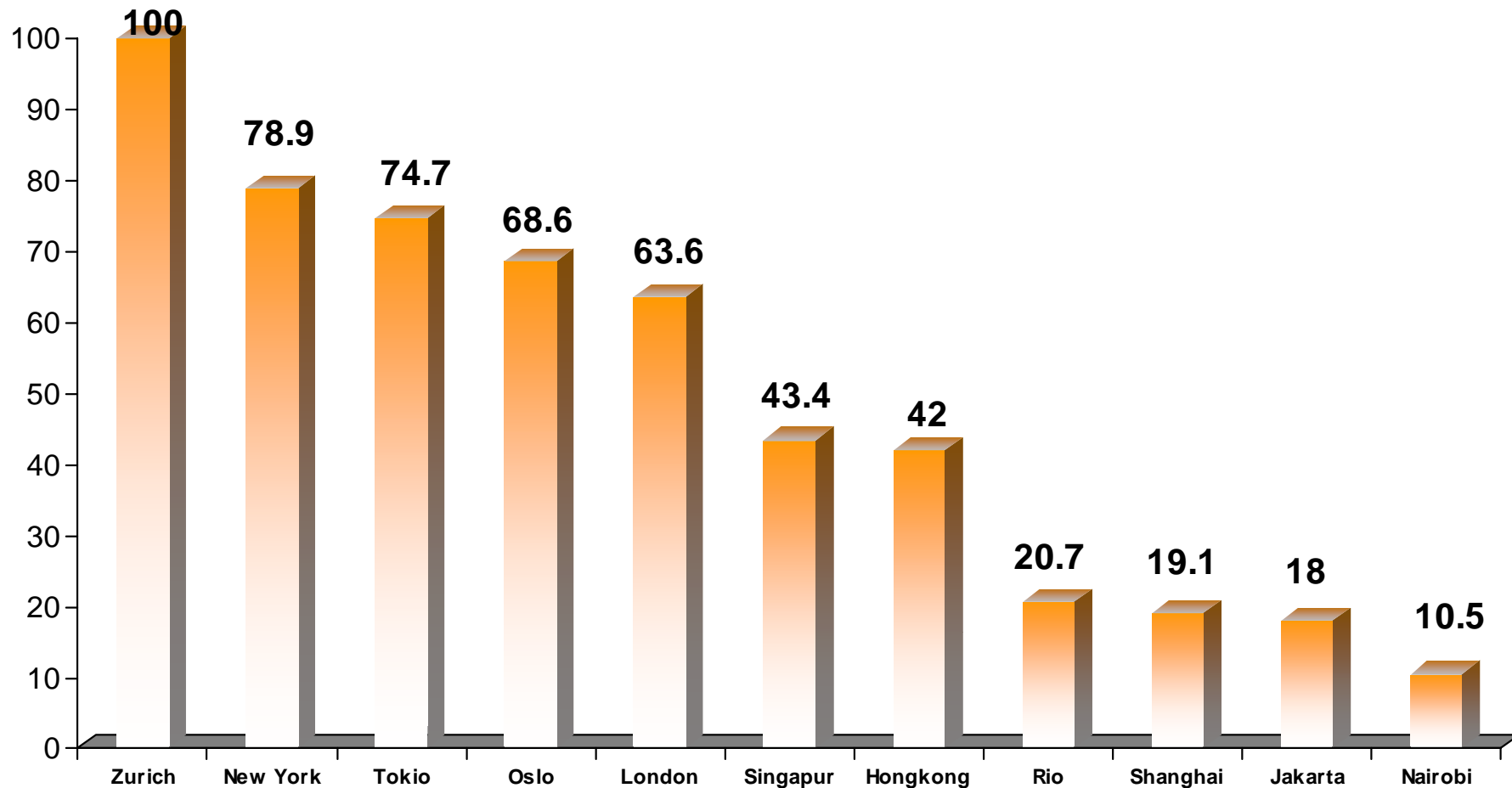
	CH	DE	FR	IT	AT	UK	B	NL	EU	USA	JP
Surface area in 1,000 km ²	41.3	357.0	544.0	301.3	83.9	242.9	32.5	41.5	3'191.0	9'373.0	377.9
Population in millions	7.3	82.6	59.6	56.5	8.2	59.1	10.3	16.2	378.5	288.4 ¹	127.4
Residents per km ²	178.0 ²	231.0	110.0	187.0	97.0	243.0	318.0	390.0	119.0	31.0 ¹	337.0
Unemployment in %	2.8	8.2	8.7	9.0	4.3	5.1	7.3	2.7	7.6	5.8	5.4
GDP in euro (thousands) pc	39.4	25.4	25.1	22.2	26.3	27.8	25.4	27.4	24.0	38.0	32.8
Swiss Imports ³ in billion euro from	-	27.1	8.7	9.1	3.5	3.9	2.3	4.5	67.2	4.4	1.8
Swiss Exports ³ in billion euro to	-	18.4	8.1	7.3	3.1	4.3	1.9	2.7	53.0	9.7	3.4

Sources: Switzerland in Figures 2003 (UBS), ¹1.7.02; ²annual average; ³excluding precious metals, gems and precious stones, works of art and antiques

Spending Capacity of Swiss People

Introduction

■ Switzerland is a front-runner regarding spending capacity
(Indexing without rental fee)

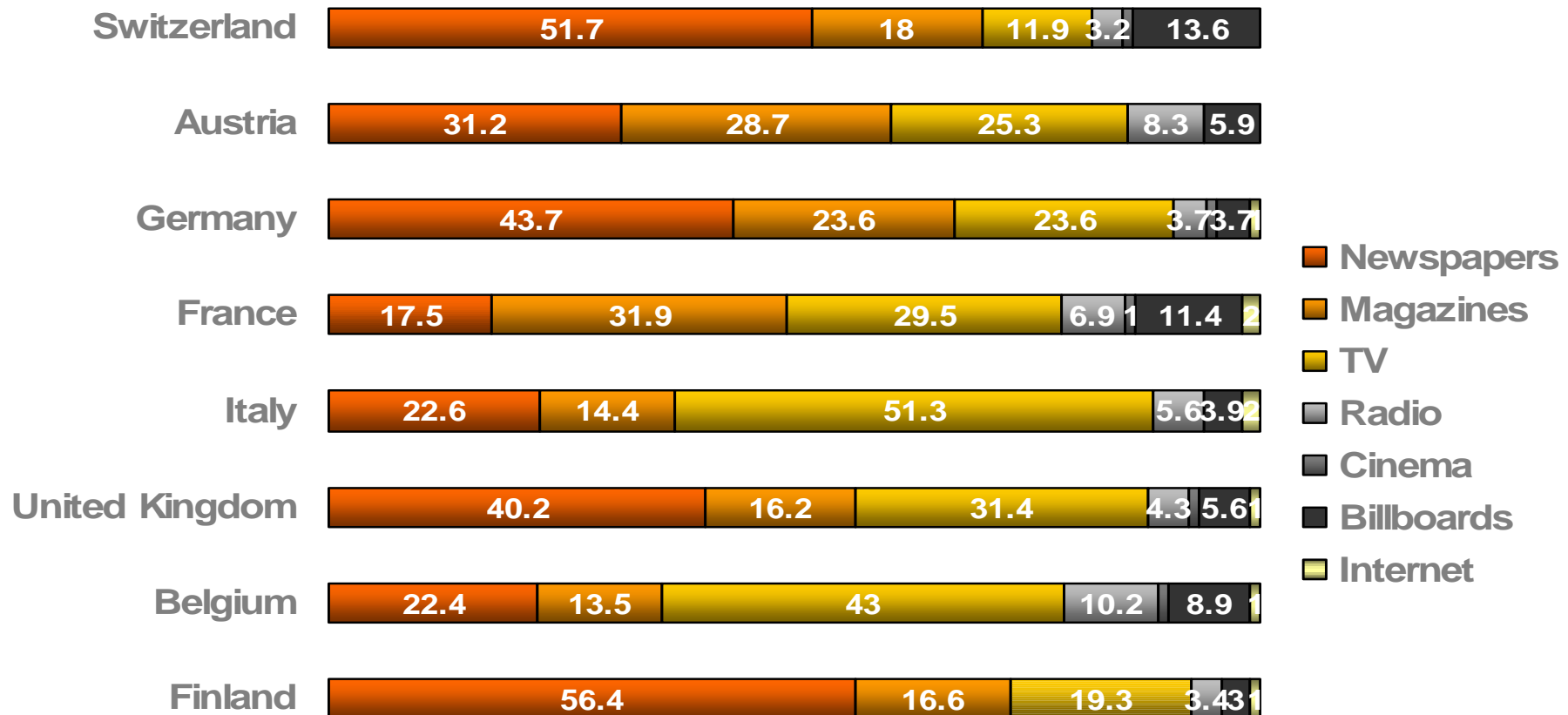


The Swiss Media Landscape

Media Scene Switzerland and Europe

Swiss Media Landscape

Market shares in % by medium according to advertising expenditures



Source: Western Europe Market und Mediafact 2003

The Swiss Media Landscape

Swiss Media Landscape

Print – in a commanding position

The **Swiss Media environment continues to be dominated** by the **printed media**.

Given the **population and size of Switzerland**, there is an **above-average number of printed publications**.

Newspapers	196
Local papers/official bulletins	408
General interest magazines	77
Special interest magazines	1'052
Professional magazines	1'001
Total printed titles	2'734
TV stations for linguistic regions	7
Total Local and regional TV	17
Radio stations for linguistic regions	3
Local and regional radio stations	53
Cinema	401
Billboards*	150'000

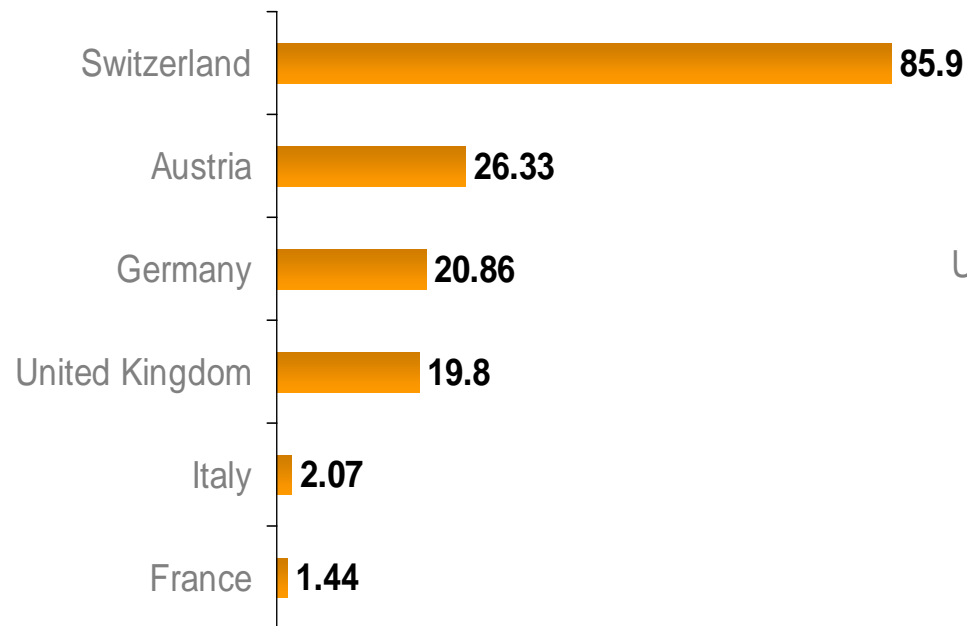
Sources: Radiotele 1. semester 2003/VSW Verband Schweizer Werbegesellschaften
2003, European Advertising & Media Yearbook 2002/Cinecom 2003/Publisuisse
*estimated figures

Media Scene Switzerland and Europe

Swiss Media Landscape

A European comparison of newspaper density

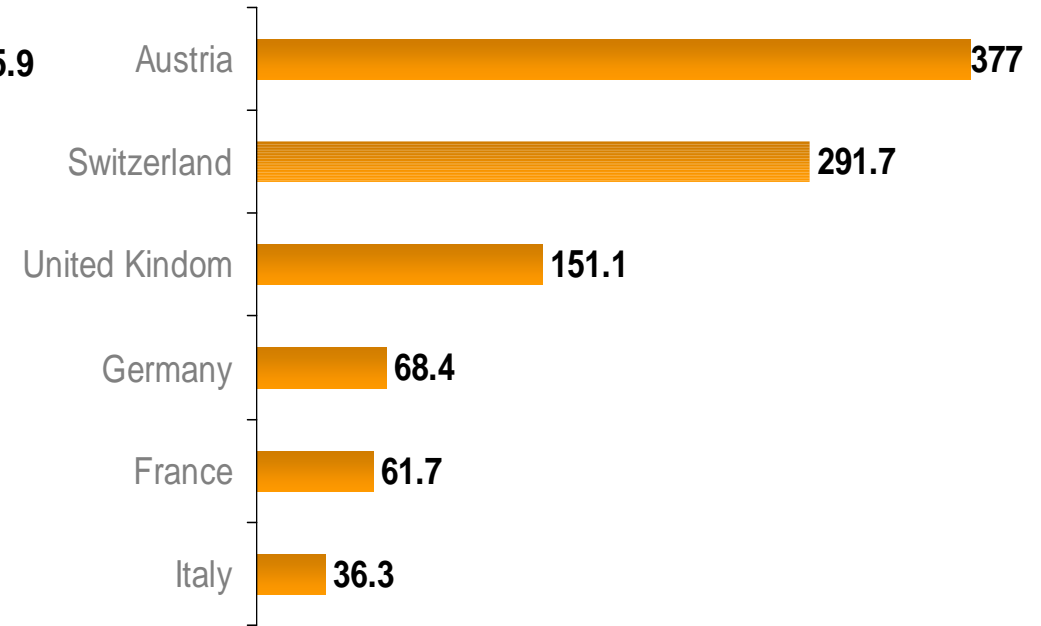
Number of newspapers per one million residents



Source: WAN 2003, ¹ Daily newspaper, ² weekly newspaper, ³ Sunday paper, ⁴ Free paper
Western Europe Market and Mediafact 2003

A European comparison of magazine density

Number of magazines per one million residents



Source: Fipp 2003, ¹ 1999 Western Europe Market and Mediafact 2003

The Swiss Media Landscape

Swiss Media Landscape

■ The combinations – a Swiss phenomenon

More than **280 combinations of newspapers and magazines** make **distribution easier** and, with their **advantageous pricing structure**, help make best use of the advertising budget.

Since it is **not possible to cover all of Switzerland with a single publication**, combinations of several newspapers or magazines are **very popular** with advertising customers.

There seems to be more and more of an **inclination these days for newspapers to group together into so-called "systems"** (consisting of a "mother" newspaper and a number of different regional sub-editions).

279

Newspaper Combinations

17

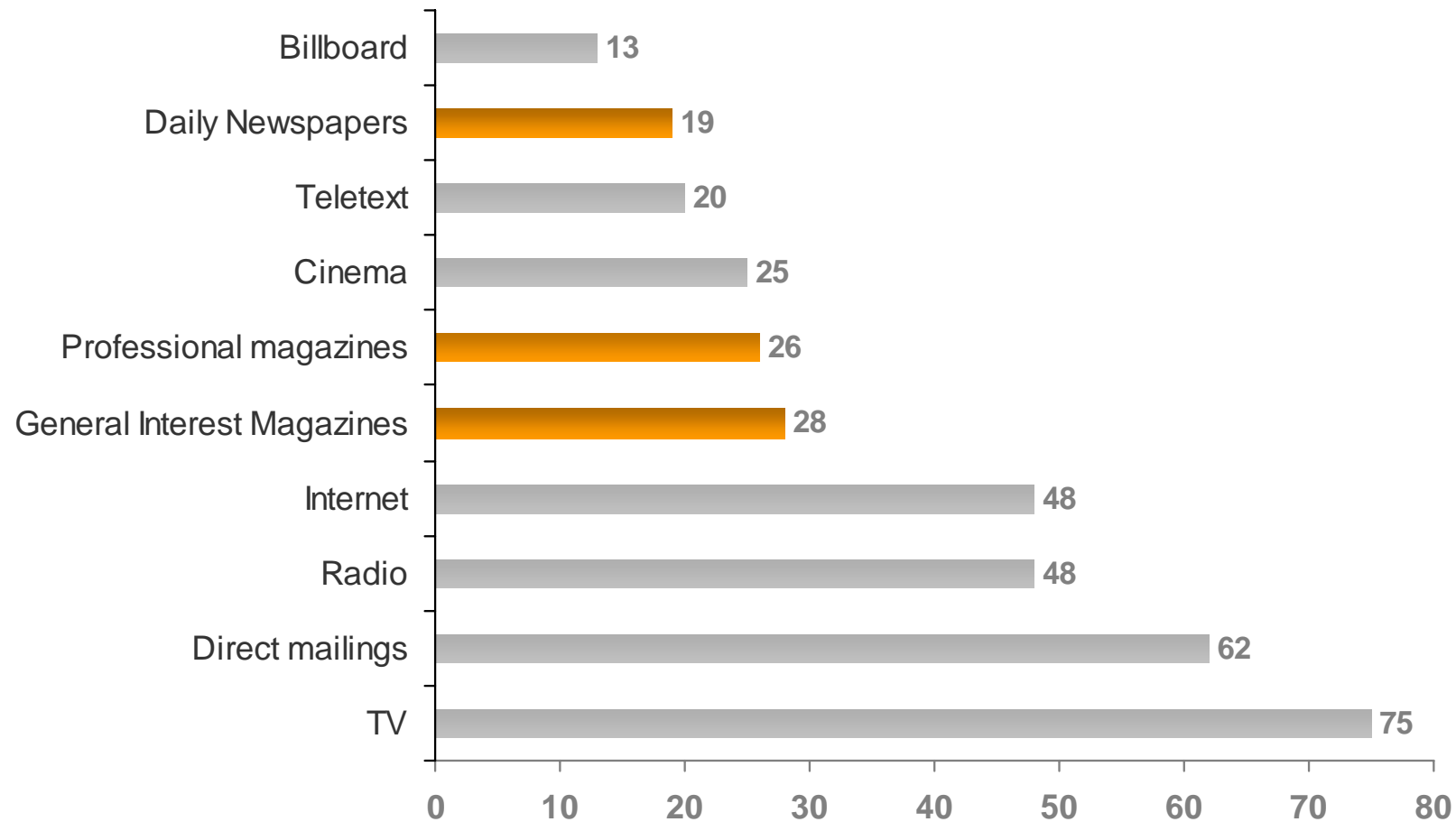
Magazine - Combinations

Source: VSW 2003

The Swiss Media Landscape

Swiss Media Landscape

■ Percentage of population either "irritated" or "extremely irritated" by advertising

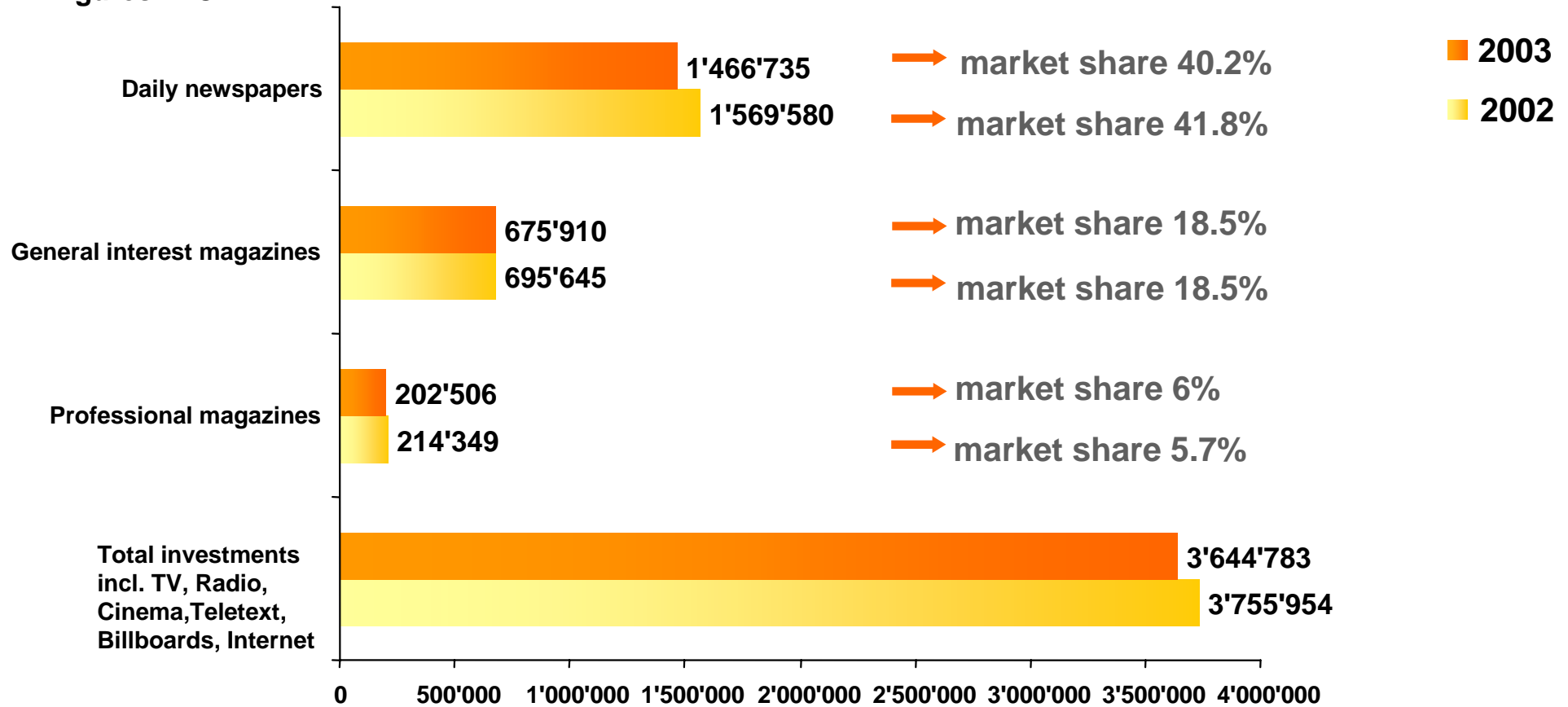


Source: Baromedia 2002

Swiss Media Investments

Swiss Media Landscape

Figures in CHF



➔ Total market share print 2003: 64.7% (Switzerland)

Print – Facts & Figures

Swiss Media Landscape

- 76.1% read newspapers nearly every day
-> **daily reach of newspapers of 73.1%**
- Average reading duration: 31 minutes
- High newspaper density
-> **89.4 newspapers per 1 million residents**
- 75% of Swiss people inform themselves through the newspapers
-> **high acceptance and attention**
- More than 80% of Swiss newspapers and magazines are subscribed to
-> **intensive connection of readers**

Thank you for your attention!

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