EMEE
EUROPEAN MUSIC EXPORTERS EXCHANGE

SWITZERLAND
MARKET PROFILE

An EMEE Music Market Study
2024

EUROPEAN
MUSIC
EXPORTERS
EXCHANGE

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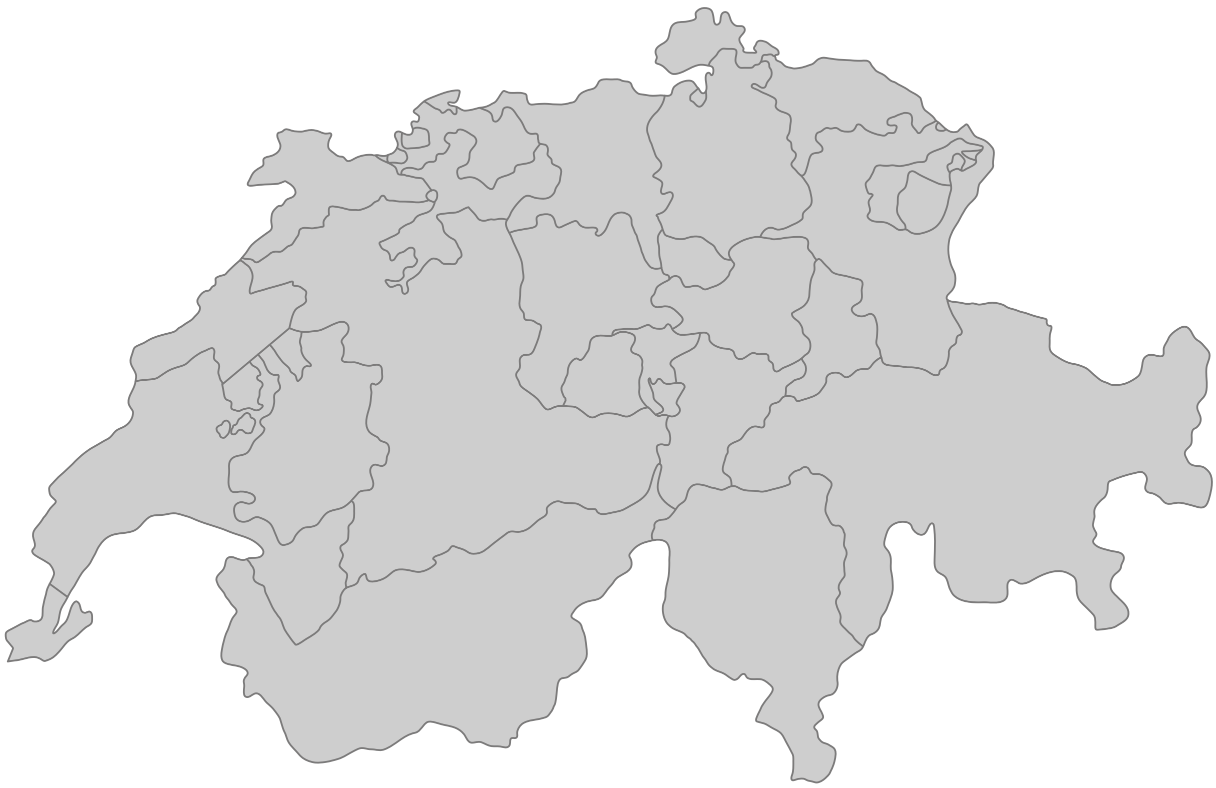


1.1 Geography and Getting Around

Population

8 812 759

(UN)

Zurich	421,878
Geneve	203,856
Basel	173,863
Lausanne	140,202
Bern	134,794

(Swiss Federal Statistical Office)

Overall Market and Language Regions

The numbers provided above clearly indicate that Switzerland, with its population of 8,8 million, is a relatively small country, resulting in a rather modest music market.

This is compounded by the fact that Switzerland is distributed into four main language regions: German (62,3%), French (22,8%), Italian (8,0%) and Romansh (0,5%). Musical tastes and target markets can vary significantly across these regions. For instance, Swiss bands originating from the German-speaking region may prioritise expanding into the German market before considering audience expansion in the French-speaking part of Switzerland.

Additionally, a recent study shows that 23,1% of the Swiss population does not have any of the four national languages as their main language (EDA, 2024). This peculiarity, which is due to vibrant immigration in Switzerland, accounts for a few interesting facts, such as Latin music (such as Reaggeton) being very well received in Switzerland, whereas it may not be in the German market.

This linguistic diversity also poses a significant factor to consider when planning (parts of) a tour in Switzerland, as audiences vary based on language. Despite these differences, certain cities serve as focal points for music within each region. In the German-speaking part, Zurich, Bern, Lucerne, and Basel stand out. In the French-speaking region, Lausanne and Geneva emerge as prominent hubs, while Lugano takes on this role in the Italian-speaking area.

Distances and Local Transportation

Switzerland is a mountainous country and populations are concentrated in the livable areas, which guarantees most inhabitants relatively close access to one of the bigger cities. This means that the distance from one main music hub to the next is approximately 1-hour drive and most inhabitants, even from rural areas, will have access to those in the same maximum distance.

Switzerland has an incredibly stable and reliable public transport system, the SBB. It is well-connected throughout the country and provides an easy way to move around. However, for foreigners without any discount cards, it might seem financially challenging due to the high prices.

Climate and (Cultural) Seasons

When it comes to timing, it is key to know that the seasons impact attendance to live events and even the consumption of recorded music significantly. As in many places, the holiday period between Christmas and New Year is relatively slow with people taking some time to reintegrate into their routine and entertainment schedule. Simultaneously, winters in Switzerland can be relatively cold (+/- 5°C) and occasionally snowy.

Activities in all sectors pick back up starting from February and touring, especially, becomes more fruitful. As late May approaches and summer draws nearer, the spotlight shifts towards vacation activities, leading to a decrease in attendance at regular venues. However, the summer season also marks the beginning of numerous festivals, presenting an incredible opportunity for growth, particularly in areas where a large local audience has not yet been established. By late August, most parts of Switzerland return to their regular (school/university) schedules, which last up to December, when the holiday season starts. Overall, it makes sense to consult the respective calendar for religious holidays to be aware of possible activities around those dates.

1.2 Society, economy and communication

Official language(s): French, German, Italian, Romansh
Other important language(s): In the music industry; English
Recommended language to communicate with local professionals: French, German, English

Currency: Franc (CHF)

Currency exchange rate with € (past three years average) (if not €): 1 EUR = 0.9546 CHF (source)

	2023	2022
Average Age (Source)	42,3	43,4
GDP (Source)	€818,2 bln	€777,8 bln
GDP Per Capita (Source)	€91 780	€88 620
Social media users (% of population) (Source)	83,1%	-
Internet penetration in households (% of population) (Source)	98,4%	98,0%

1.3. Tax and Legal

1.2.1. Artist status and business identity management

As an artist in Switzerland, if you're not employed by an entity like a school etc you're typically considered self-employed and therefore have to take care of all arrangements around social security. A freelancer in Switzerland is not automatically self-employed, since for the duration of an engagement they may stand in an employment relationship, they are therefore employees (iGroove, 2017).

The option to create a company of sole proprietorship does exist and states a natural person as the sole owner. It is an option commonly chosen, as more expenses can be deducted when filing for taxes and its creation is relatively simple. However, one assumes unlimited personal liability and personal assets are not protected (KMU, 2024).

In addition to this, there is the General Partnership, which allows two or more people to join in a business identity and therefore might be interesting to bands with numerous members. It provides some protection when it comes to liability due to the increased number of parties. However, it is important to note that this requires each member to be registered as self-employed.

If a person is seeking to establish an entity to hold events or festivals in Switzerland regularly, it does make sense to create a limited liability company (GmbH), which is not generally chosen by artists or their immediate structures. A registered association is also often used as a legal form for artistic collectives, but does not offer limited liability.

1.2.2. Copyright law and collective licensing

Copyright in Switzerland is regulated by the Federal Act on Copyright and Related Rights.

The Swiss copyright law is not fully harmonised with the EU law, but as a signatory to the Berne Convention and WIPO treaties (source: WIPO), the framework is broadly similar.

Switzerland's CMO is named SUISA and it represents the works of registered authors and/or publishers and undertakes to collect royalties for the members when their music is broadcasted, performed or reproduced.

Foreign sister societies licence the works in SUISA's repertoire for use in their own territories and pass on the remuneration to SUISA for distribution to its members.

Which licences are granted collectively by the CMOs vs negotiated individually

USAGE	AUTHOR'S RIGHTS	NEIGHBOURING RIGHTS (recordings)
Public performance	SUISA issues licences. Tariff determines the rate.Special Case: "Grand Rights" (e.g. Opera, Musical): Rightsholders issue licences individually.	SUISA, on behalf of SwissPerform, collects levies. Tariff determines the rate.
Broadcasting in radio and TV	SUISA issues licences. Tariff determines the rate.	SUISA, on behalf of SwissPerform, collects levies. Tariff determines the rate.
Reproduction and distribution (physical)	SUISA issues licences. Tariff determines the rate.	Rights holders issue licences individually.
Background music	SUISA issues licences. Tariff determines the rate.	SUISA, on behalf of SwissPerform, collects levies. Tariff determines the rate.
Making available online	SUISA licences music for streaming and download based on negotiations with service providers (no federal supervision).	Rightsholders issue licences individually or via licensing hubs (not via SWISSPERFORM).
Licensing to film production	Mechanical Rights: SUISA issues licences. Tariff determines the rate.Sync Rights: Rightsholders issue licences individually.	Rights holders issue licences individually.
Licensing to TV production	Mechanical Rights: SUISA issues licences. Tariff determines the rate.Sync Rights: Rightsholders issue licences individually.	Rights holders issue licences individually.
Licensing to advertisements	Mechanical Rights: SUISA issues licences. Tariff determines the rate.Sync Rights: Rightsholders issue licences individually.(Moral Rights): Rightsholders issue licences individually	Rights holders issue licences individually.

Licensing to video games production	Mechanical Rights: SUISA issues licences. Tariff determines the rate.Sync Rights: Rightsholders issue licences individually.	Rights holders issue licences individually.
Private events	No licence needed. Permitted by Swiss Copyright Act.Private = close friends and family.	No licence needed. Permitted by Swiss Copyright Act.Private = close friends and family.

1.2.3. Visa and other mobility info

As long as the musical engagement does not exceed a total of 8 days and the person is legally allowed to be in Switzerland (for example with a Schengen visa), no further visa is needed (Art. 14 Abs. 1 VZAE). However, this excludes the following countries, from which artists will need a visa as well as a work visa: Albania, Bosnia and Herzegovina, Georgia, North Macedonia, Moldova, Montenegro, Serbia, Taiwan (Chinese Taipei), and Ukraine (please check for updates, since this is from 2020).

If the engagement extends this period, the migration office should be contacted, ideally with the help of the respective venue or entity organising the cultural activity (SEM, 2024).
It is important to note that at this point Switzerland is indeed part of Schengen (and therefore any Schengen visa applies). However, it is **not part of the European Union.**

1.4. Music and Creative Industries Policy

There are a multitude of funding possibilities in Switzerland. However, most of them do require affiliation with a local partner since they are often funded through tax money and therefore need to be requested by the respective national, cantonal or regional government.

However, there are many private foundations that occasionally support international artists coming to Switzerland. Chances usually are better if requests run through the local presenting party.

A search engine of all governmental as well as private foundations can be found here.

Nevertheless, there are several programs that specifically focus on collaborations with international artists. However, this often applies to a very specific country or area of the world that is collaborated with. See for example Pro Helvetia and ArtLink.

To provide an idea of the magnitude of the support provided in Switzerland, refer to the graphic below, which was part of a study conducted in the French part of Switzerland in 2023 and can be somewhat extrapolated to the entirety of Switzerland.

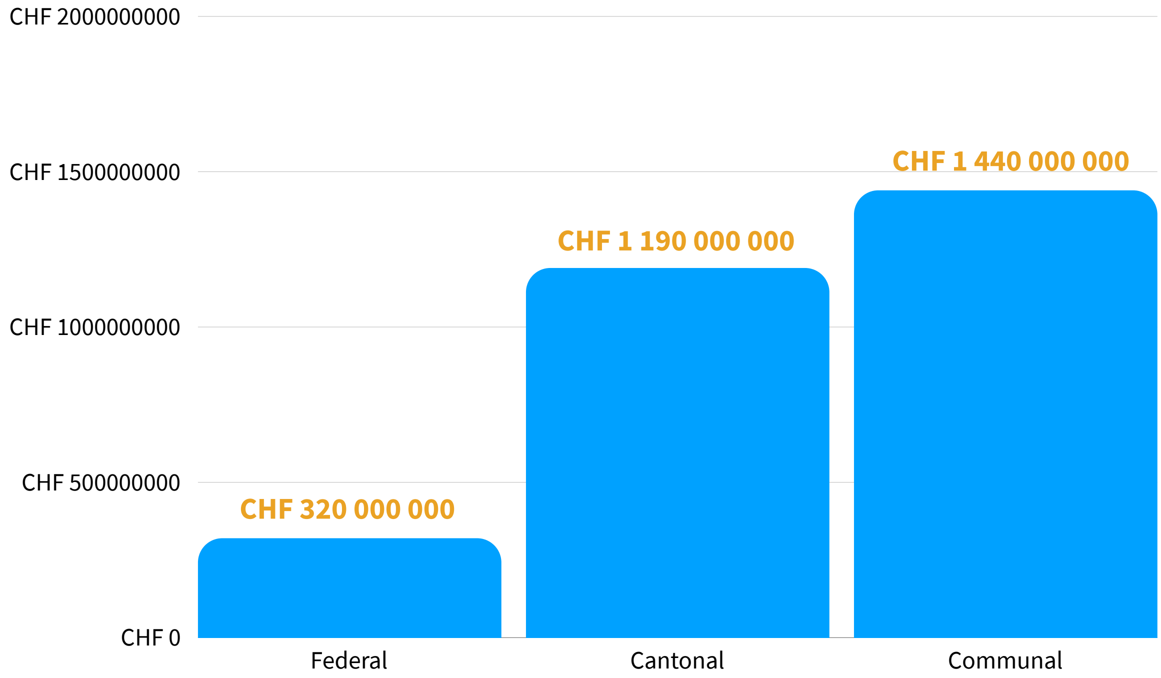


Figure 1. Public funding per year (2018) for music on the federal, cantonal and communal levels in Switzerland. Source: Pro Helvetia.

2. Music Consumption

2.1. Music Discovery and Engagement

The recent study by IFPI shows a steady increase in the recorded music segment of the Swiss music market since 2016.

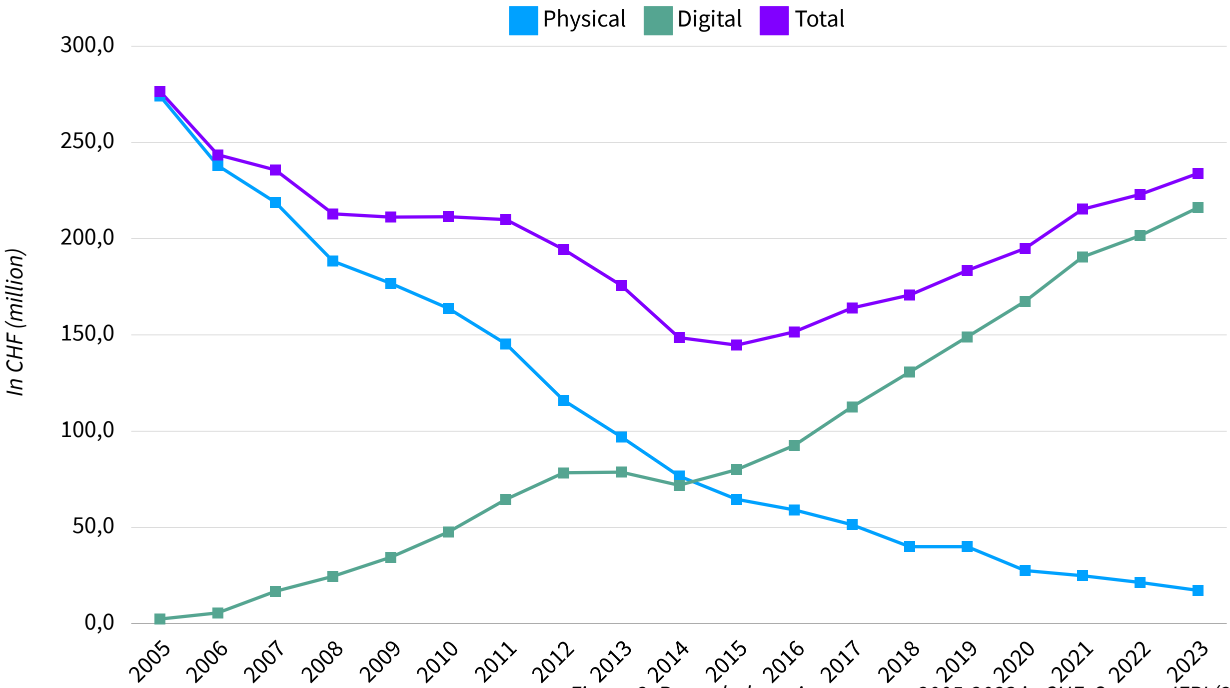


Figure 2. Recorded music revenues, 2005-2023 in CHF. Source: IFPI (2023)

Within this trend, social media platforms such as TikTok, Instagram and Facebook keep gaining importance, due to the short video content that has given music a new role when creating visual content and managed to propel unexpected songs and newcomer artists to the top of the charts (Amstutz, 2023). This development may also have had an impact on the consistent growth of streaming platforms.

On the other hand, an exploration of the Swiss population concerning participation in live music events reveals mixed results, depending on the genre and size of events and concerts, especially since the pandemic.

In particular, when it comes to music discovery, it turns out that this more rarely happens through attending live events and rather shifted to streaming and social media platforms and then may result in attending a performance of an already very established artist.

A study conducted by the Swiss Federal Statistical Office in 2019 compared the behaviour around the consumption of music between 2014 and 2019, over 5 years. In 2019, 96% of respondents stated that they had listened to a minimum of one genre of music regularly, whereas 70% said they had attended one or several concerts within the last year (Bundesamt für Statistik, 2024). One fact that sticks out is that more regional styles of music still play a very big role in the consumption of music on a national level.

The following graph, generated by the same study, also gives valuable insight into the types of music mostly consumed in Switzerland overall.

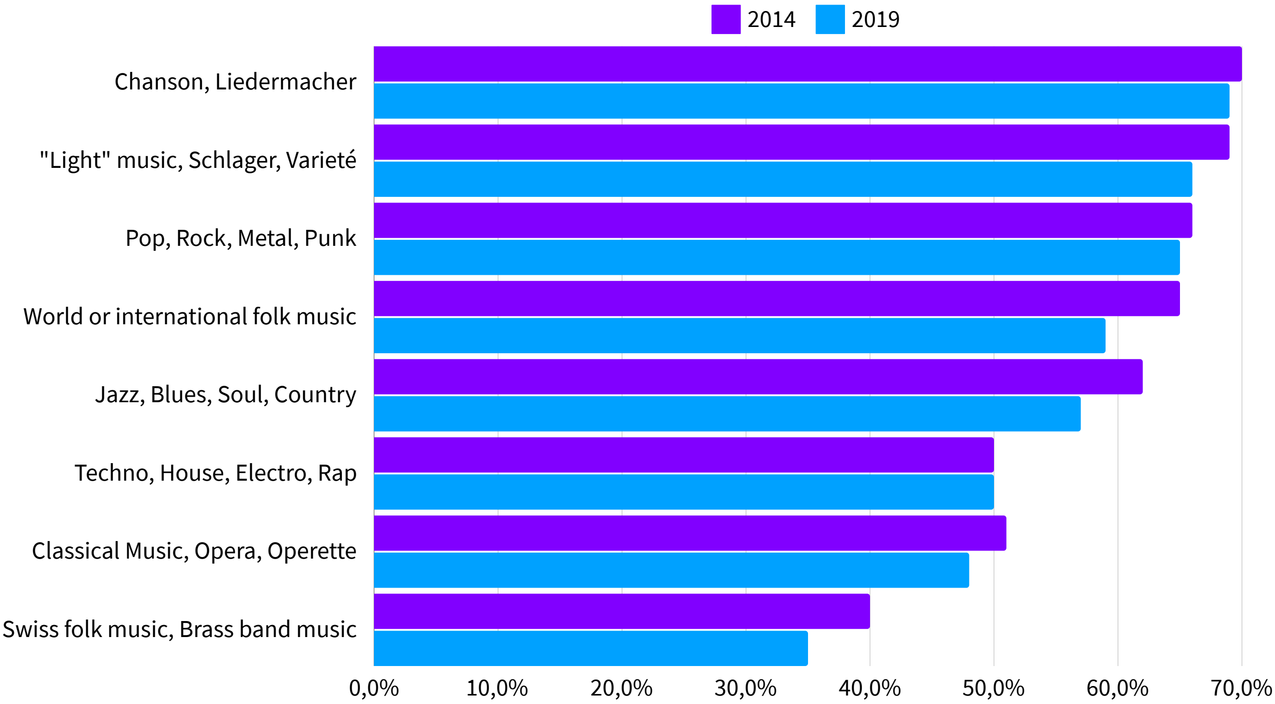


Figure 3. Preferences of listening to different styles of music in 2014 and 2019. Listened to in the last 12 months (confidence interval = 95%). Source: Swiss Federal Office for Statistics.

2.2. Participation in Live Events

In general, one very unique thing about Switzerland is the fact that it has one of the highest live music events per capita in the world. This is mostly reflected in the considerable number of festivals happening between May and September. Even though this does not necessarily mean that Swiss people automatically attend more concerts, it does indicate that live music, and especially festivals, are clearly part of the cultural habits.

SMPA, the «Swiss Music Promoters Association» is the trade association whose members account for over 80% of all concert, show and festival tickets sold in Switzerland. The members of SMPA are therefore rather large-scale event organisers, whereas many venues and smaller events are members of and represented by PETZI. These are also general non-profit venues and often get subsidised (max 20%) by the government.

Year	Total Number of events	Total Number of tickets sold	Total number of visitors*
2019	2088	3 973517	5 610 559
2020	640	653 647	693 693
2021	708	659 965	705 144
2022	2321	3 159 799	4 368 226

** including guests, free-of-charge offers in the context of the event etc.*
Figure 4. Data from the SMPA index 2022. Source: SMPA

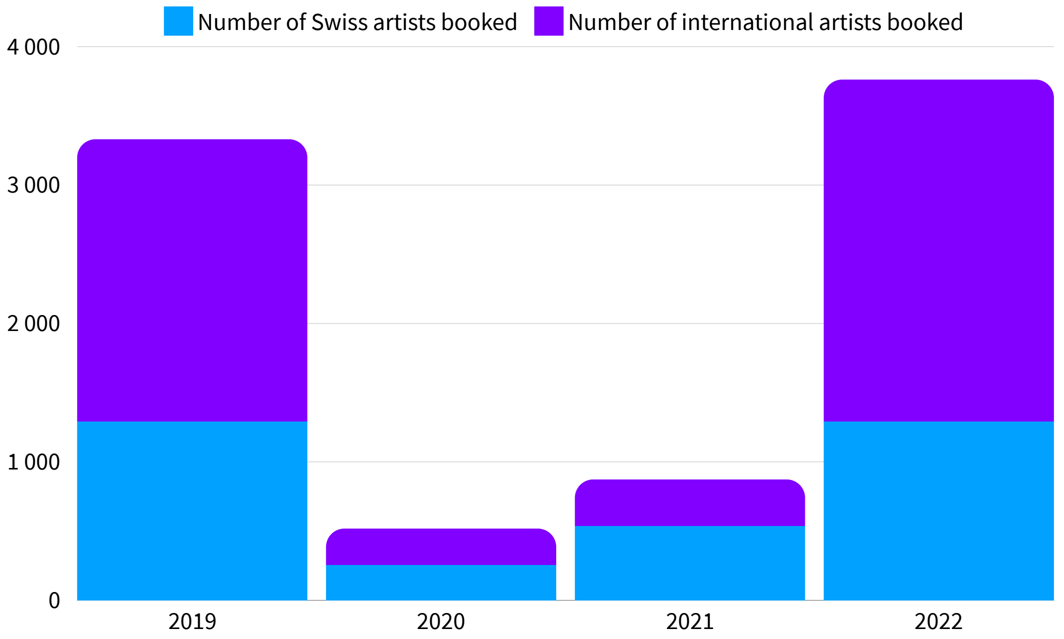


Figure 5. Number of Swiss and international artists booked to events and festivals in Switzerland from 2019-2022. Data from the SMPA index 2022. Source: SMPA

These most recent numbers for 2022, show a total of 4,37 million people visiting concerts or festivals, which is almost 50% of the Swiss population. Nevertheless, this certainly does not mean that all of these visitors were Swiss and also does not account for visitors who have attended multiple performances. It also shows clearly how the live event industry strongly bounced back in 2022, once major concerns around COVID were over. The average ticket price displayed in the SMPA index is about CHF 87 Swiss Francs, which is a rather high ticket price, considering that (at least at the moment), the Swiss Franc is basically aligned with the Euro. However, it has to be considered that these numbers represent the major events that usually feature very well-established artists.

However, experience reports by Petzi paint a slightly different picture, as these high numbers and apparent strength within the live music sector seem to largely be limited to big events and well-known artists. Smaller venues are still trying to regain their number of visitors, which seems to have been declining even before the pandemic due to a changed behaviour of the audience. Whereas for festivals it has stayed quite steady, it seems like attending concerts and discovering artists that way is no longer such a sought-after activity. Some argue that this is a result of very high ticket prices that the customer is not willing to pay if they do not know the performing artist. However, the root cause of this development is debatable.

2.3. Listening to Recorded Music

A recent study shows that 71% of Swiss people use at least one music streaming platform that specialises in music (Beyeler, 2023). Interestingly, the platform used most to listen to music is YouTube, whereas only 22% of users pay the premium version to listen to music ad-free. The fact that a rather low percentage of users pay for their streaming services seems to be a reality that can be observed throughout the usage. The general distribution of listeners across different platforms is presented in Table 1.

Platform	2023	2022	2021
YouTube	73%	73%	62%
Spotify	52%	49%	44%
Apple Music	25%	18%	16%
YouTube Music Premium	22%	13%	*
Soundcloud	20%	12%	11%
Amazon Music	17%	8%	7%
Deezer	16%	9%	6%
Tidal	13%	5%	3%
Napster	13%	4%	2%
Other	27%	18%	15%

Table 1. The general distribution of listeners across different platforms.
Source: Beyeler, Ralf (2023). Music streaming: YouTube beats Spotify. Moneyland

Whereas the amount of users overall has stayed relatively constant between 2022 and 2023, there had been a clear increase in numbers in the previous year (Swiss iT Magazine, 2023). When it comes to which age groups use which platforms, there are no reliable numbers for the Swiss music market. However, there might be some reasoning that the German numbers researched in 2023 might be somewhat applicable to the Swiss market, which shows that Spotify is preferred in the group between 14 and 29 years old, whereas YouTube tends to be more dominant for older target groups. Lorenz Haas, managing director of IFPI Switzerland, is positive that the Swiss market still has the potential to grow, especially when it comes to streaming.

As for the live music sector, there is a continuous stream of new festivals emerging, which keeps the festival culture alive and spurs innovation (music styles, venues, locations) across the country.

3. Music Ecosystem

3.1. Music Economy

According to PwC, the Swiss music market generated sales of CHF 223,7 million (€228,5 million) in 2022, up 4% from the previous year, with streaming and social networks driving growth, (PwC, 2022).

This marks the seventh year in a row that the (recorded music) market has shown growth, the Swiss Association of Music Labels (IFPI) announced in their report. It is important to note that these figures only include the revenues of the recorded music industry and do not account for live music, which, according to the SMPA index of 2022, adds approximately CHF 382 million gross (€390,2 million) to the overall music economy. Another estimation for the live music market in 2022 provided by a PwC study amounts up to CHF 576 million.

Digital sales are the clear driver of growth in the recorded music industry, accounting for 85% of total revenue. Within the digital sector, IFPI reports strong growth in ad-supported streaming revenue. This can be attributed to the rise of short video formats popularised by TikTok, followed by Instagram Reels and YouTube Shorts, which all heavily feature music. According to the PwC study, ad-supported streaming has, for the first time, overtaken physical formats of listening to music with revenues of CHF 24 million. This also suggests that there may still be further future potential for growth in the streaming sector.

At the same time, as in many countries, CD sales have been consistently in decline for many years. Even vinyl sales declined for the first time in 2022 after its renaissance over the past twelve years. However, this may only be a temporary phenomenon, as vinyl still proves to be a valuable item to drive merchandise sales.

3.2. Industry Events and Conferences

M4music
March, 2 days conference, demotape-clinic and conference, approx 6.000 visitors, 1.600 professionals.
M4music is the perfect starting point for anyone trying to get acquainted with the Swiss music industry. They describe it as follows: “The Migros Culture Percentage pop music festival is the hub for the national pop music scene and the place to be for every music fan. The festival is the ideal spot at which to discover new talent, get to know pros from the music business and enjoy barnstorming performances by bands from home and abroad”. (Description by m4music)

Label Suisse
September, every other year, 3 days festival, free entrance, approx. 75 000 visitors.
Label Suisse is a free city festival with Swiss acts only, taking place on many stages in Lausanne, in the French part of Switzerland. The festival is also partly complemented with offers for professionals. It usually takes place in September every other year and like m4music

features many innovative acts alongside a programme for music industry professionals. important contacts with politicians”.

Although Label Suisse offers a smaller amount of conference programmes compared to m4music, it does feature music from all musical genres. However, its focus is exclusively on Swiss artists.

Further events for Music Professionals:

- JazzDays
- Rock4Future
- Swiss Live Talents

3.3. Industry Trade and Development Associations, Unions

SMPA: Swiss Music Promoters Association

“The SMPA is the Swiss trade association for the organisers of concerts, shows and music festivals. In 1991, the main organisers of concerts, shows and festivals in Switzerland decided to join forces and create a trade association, the SMPA. The SMPA's members account for 80% of Switzerland's concert, show and festival ticket sales. Each year, the members of the SMPA organise about 1400 events of all kinds attended by 4,9 million visitors; altogether, they sign up about 2500 artists each year, generating annual sales of approximately CHF 310 million”. According to their website, SMPA has 45 members.

PETZI

“PETZI currently represents 190 music clubs and festivals in 21 cantons and three linguistic regions. Its members are music clubs and festivals that organise primarily contemporary music concerts for cultural purposes and are not profit-oriented”.

IFPI

“IFPI Switzerland is the trade association of Swiss music labels (manufacturers of sound and audiovisual recordings). As a not-for-profit organisation, the IFPI supports its members' interests in economic and legal matters concerning the music industry. The IFPI has 40 members, representing almost 90% of the Swiss music market. It is part of the global industry association, which has around 1300 members in 70 countries worldwide”.

SONART - Musikschaffende Schweiz

“The object of this association is to promote the interests of Swiss musicians, particularly with regard to the legal framework conditions which have far-reaching implications for musical creation and the dissemination of musical recordings, and to further the implementation and societal acceptance of these framework conditions. The association also acts as a forum for exchanges between its members and as a platform for various actions. In principle, all active lyricists, composers, producers, musicians and performing artists in Switzerland may apply for membership”. According to the website, SONART has over 2800 members.

IndieSuisse

"IndieSuisse, the association of independent music labels and producers, was founded on 17 February 2014 at the Fri-Son in Fribourg. Since then, IndieSuisse has stood up for the interests of the Swiss recording industry. IndieSuisse has a dense network of music labels and maintains important contacts with politicians". According to their website, IndieSuisse has 49 members.

MMF Switzerland

"The purpose of MMFSuisse is to promote and represent the interests of its members and their clients, which includes political representation, providing and exploring networking opportunities, supporting overall management activities, media work and ultimately promoting and improving the national framework". According to the website MMF Switzerland has 48 members.

SVMV

"The SVMV is an association representing the interest of the Swiss Music Publishers towards the music market and politics. They support their members with education, network and know-how and essential business news". According to the website SVMV has 36 members.

3.4. Collective Management Organisations

The collective management organisations in Switzerland are the following:

- **ProLitteris**: Swiss Copyright Society for Literature and Visual Arts.
- **SSA**: a cooperative society of authors in the theatrical, musical theatre, choreographic, audiovisual, and multimedia sectors.
- **SUISA**: Swiss Cooperative Society for Authors and Publishers of Music
- **SUISSIMAGE**: manages the copyrights of film authors, such as scriptwriters and directors, and right holders (e.g., film producers).
- **SWISSPERFORM**: manages neighbouring rights (also called related rights) in Switzerland and the Principality of Liechtenstein for performing artists, producers of audio and audiovisual recordings, and broadcasters. (SUISA, 2024)

3.5. Other Music Organisations

Schweizer Musikrat

The Swiss Music Council is the largest and most influential representative for the entire music sector in Switzerland. It advocates for the improvement of cultural and educational policy frameworks for the creation, dissemination, distribution, and preservation of music in all its diversity. By promoting this cultural diversity, the Swiss Music Council supports social cohesion in Switzerland. This includes professional musicians as well as amateur musicians.

SONART

As already mentioned in Industry Trade and Development Associations, SONART is a vital institution for representing musician's interests in Switzerland. It also is a great point of contact for anyone interested in any aspect of the musical activity in Switzerland, since they represent the interests of the industry overall and therefore are in touch with a variety of music professionals and their structures.

SMV

The Swiss Musicians Union advocated on behalf of orchestras as well as independent musicians and assisted with legal advice.

4. Live Music Sector

The live music sector in Switzerland is characterised by a multitude of festivals, which makes it an attractive touring destination for artists and bands during the late spring and summer months. There also are many venues featuring different genres. Lastly, the club scene and therefore the market for electronic music is quite large and well-attended.[2]

4.1. Live Music Industry in Figures

According to the PwC report, the revenue generated by the live music segment in Switzerland amounted to CHF 576 million in 2022. Switzerland has one of the highest live music event per capita densities in the world, which is partly due to its significant number of festivals that happen mostly during the summer months.

Certain venues, especially those presenting world-renowned artists, have a high attendance. For instance, Hallenstadion in Zurich, reported revenues of CHF 20 million, and a profit of CHF 750,000. According to the PwC report, Hallenstadion is still the most successful event hall in the world in its category.

However, the numbers provided by SMPA (see Figure 5) show that overall, since the pandemic, the amount of visitors has decreased, which indicates some stagnation in the live music market.

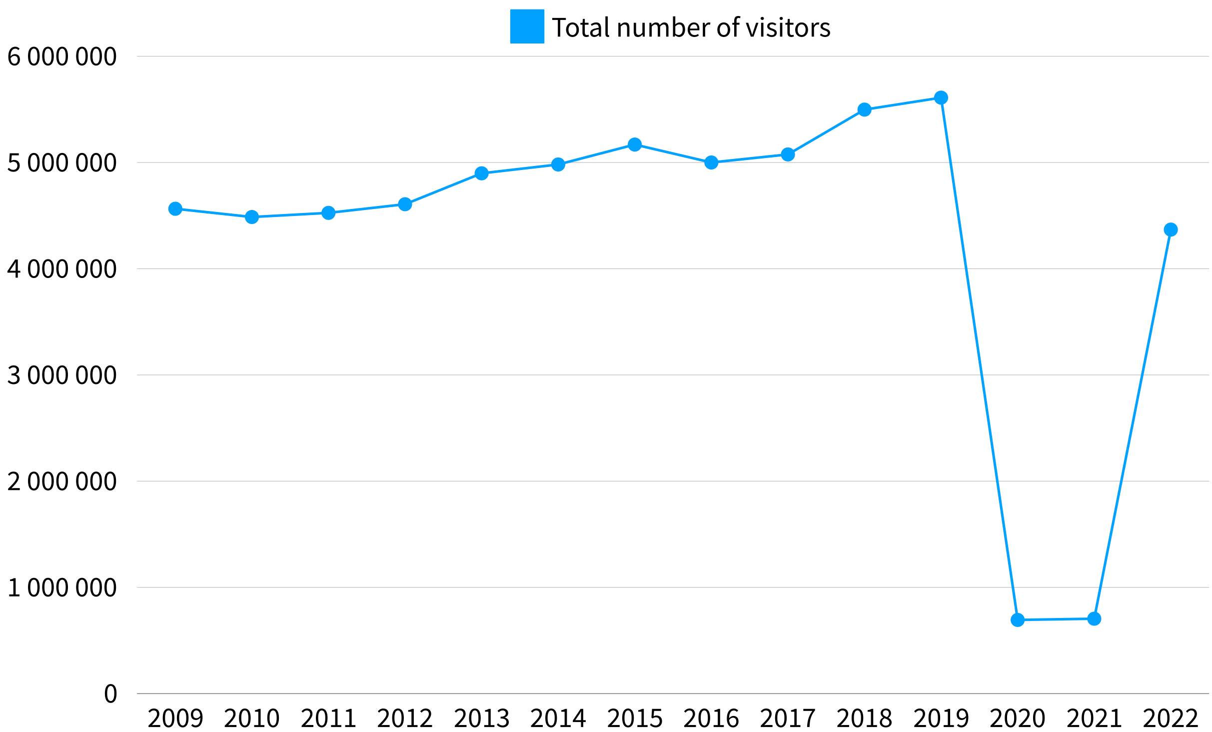


Figure 5. Total number of visitors at live music events. Source: SMPA index.

Similar developments are reported by PETZI when they describe the development of attendance of smaller venues and events of a lower magnitude, which makes it extremely difficult for some venues to survive.

The pandemic further accounts for a whole segment of young people two years ago, who had their peak time of defining their identity and habits during a time when there was no live music happening whatsoever.

Adding to that, Anya della Croce, Executive manager of the French-speaking office of Petzi, also describes how even before the pandemic consumer behaviour had been changing gradually. Especially when it comes to music discovery, it seems that consumers of live music tend to only attend the concerts of artists they already know or are well established, whereas before, audiences were more tailored to a specific venue and people would discover whatever artist or band would be playing there.

Venues that are members of Petzi also generally curate their programming themselves, which makes it even harder for them to compete with bigger and more resourceful promoters who are booking established acts.

4.2. Music Festivals

Switzerland plays host to a plethora of pop, rock and jazz festivals over the summer months, which attract both national and international audiences and have had a long-standing tradition in Swiss culture and are as important to the local economy in the place they are hosted, as to the event-organiser itself (Swissinfo, 2002).

Please find in the following a list of some important festivals to look at as an international artist:

Montreux Jazz Festival (*Montreux, July)*
The Montreux Jazz Festival is a music festival in Switzerland, held annually in early July on the Lake Geneva shoreline. It is the second-largest annual jazz festival in the world after Canada's Montreal International Jazz Festival. Even though its name includes “jazz”, it has expanded its range in genres significantly over the last years and now features all kinds of different styles besides and including jazz.
Capacity: Different venues and capacities, but yearly around 250K visitors
Notable International Acts: Muse, Radiohead, Kendrick Lamar, Pharrell Williams, Ed Sheeran, Alicia Keys, Adele, Lady Gaga, Tyler The Creator, Lizzo, Rita Ora

Paléo Festival (*Nyon, July)*
Nestling between the Jura Mountains and Lake Geneva, halfway between the cities of Geneva and Lausanne, “the First Folk Festival” of 1976 has become one of Europe’s largest open-air musical events. Usually, over six days, audiences totalling more than 300k come together for more than 250 concerts and shows in a celebration of Rock, Pop, Electro, Rap, French Chanson and many other genres. Both a springboard for young talents and a platform for headliners,

Paléo has gradually opened up to all musical styles, as well as to circus and street arts. (Description from YOUROPE)
Capacity: 50 000
Notable International Acts: Angèle, Stromae, Sting

Gurtenfestival (*Berne, July)*
On 4 live stages and in 3 dance tents, a high-quality music program takes place 4 days a year above the Swiss capital. The festival is a mainstream/pop festival, which focuses on musical accents and quality. The three dance tents are dedicated to different musical orientations: Supermercardo features finely selected hits, Cosmodrome electronic music, sounds and beats, and Soundgarden hip hop, bass music and club sounds. Here, too, great importance is attached to a qualitatively diverse, good line-up as well as to young, innovative acts. (Description from YOUROPE).
Capacity: 20 000
Notable International Acts: Rosalia, Black Eyed Peas, Anitta, Burna Boy, Justice

Greenfield Festival (*Interlaken, June)*
3 Days of Rock on 2 Stages. Greenfield Festival was the first conceptual Rock festival in Switzerland and presented approx. 40 national and international rock bands each year. For the past years, the Greenfield Festival has taken place in Interlaken. The audience gathers from all over Europe to see their favourite Bands in the wonderful mountain scenery. (Description from YOUROPE)
Capacity: 30 000
Notable International Acts: Red Hot Chili Peppers, Foo Fighters, System Of A Down, Green Day, Die Toten Hosen

OpenAir St. Gallen (*St.Gallen, June)*
The attractive and young international line-up guarantees a balanced music program and attracts audiences from neighbouring countries. The musical style is widely varied, which also contributes to the special character of the festival. The various stages present a young alternative and indie rock program – as well as rock, pop, comedy, hip hop, electronica, reggae, world and folk music and a large percentage of Swiss artists, which all contribute to enrapture the audience. (Description from YOUROPE)
Capacity: 30 000 per day
Notable International Acts: Macklemore, Lewis Capaldi, The Lumineers

OpenAir Frauenfeld (*Frauenfeld, July)*
Openair Frauenfeld is an annual hip-hop music festival that takes place in Frauenfeld in July. It is considered to be the largest open-air festival in Switzerland and the largest hip-hop music festival in Europe. The event has been held since 1985.
Capacity: 150 000
Notable International Acts: Jay-Z, Eminem, Kanye West, Macklemore, Snoop Dogg, 50 Cent, Kendrick Lamar

Kilbi Bad Bonn (*Düdingen, May/June)*
Bad Bonn Kilbi is an annual, three-day open-air music festival in Düdingen, Switzerland since 1991. The festival has a focus on alternative rock music; primarily those related to experimental rock, noise rock and other avant-garde genres.
Capacity: 2 500

4.3. Music Venues and Clubs

Amongst the large number of small venues and clubs that represent all genres and styles, this is a selection of venues that regularly host international (newcomer) artists. In order to grasp the stylistic direction, refer to the website.

Helsinki
Location: Zurich
Capacity: 120

Bogen F
Location: Zurich
Capacity: 80-100

Kaserne
Location: Basel
Capacity: 1200

Gannet
Location: Basel

Palace
Location: St. Gallen
Capacity: 300

Salzhaus
Location: Winterthur
Capacity: 600

Bierhübeli
Location: Bern
Capacity: 800

Rote Fabrik
Location: Zürich
Capacity: 600 / 900 / 200

Fri-Son
Location: Fribourg
Capacity: 300 / 1200

Le Romandie
Location: Lausanne
Capacity: 300

L'Amalgame
Location: Yverdon-les-Bains
Capacity: 400

Rocking Chair
Location: Vevey
Capacity: 500

Case à chocs
Location: Neuchâtel
Capacity: 700

Bikini Test
Location: La Chaux-de-Fonds
Capacity: 400

4.4. Promoters and Booking Agents

As in most places, the promoters and the venues are very much intertwined and depend on each other. Unlike some other regions, Switzerland's live event scene hasn't succumbed entirely to a monopolistic structure. This fosters a degree of independence for promoters and event organisers in their programming and execution.

Providing a selection of promoters or booking agents is difficult, due to the individual needs of each artist or band depending on size, target audience and genre. A list of promoters in charge of rather large-scale events can be found on the SMPA's website. A list of smaller venues and promoters can be found on PETZI'S website.

Important promoters in Switzerland include but are not limited to the following: Gadget, Mainland Music, TAKK, Just Because, and Good News Productions.

4.5. Organising a Tour or Gig

In focus: Organising a Tour or Gig in Switzerland

This section is compiled from many conversations with people in the music industry including the author herself who is both a musician and a project manager for Swiss Music Export; Roberto Haçaturyan, from Artlink, an institution dedicated to bringing in artists from abroad and putting together concerts to create valuable cultural connections; and others like Jean Zuber, who has been at Swiss Music Export since 2007.

While an artist's experience may differ depending on their established reputation (which is true for any country), here are some key considerations for planning a gig or tour in Switzerland:

- **Audience:** As in most industries, data is important in the music scene. To build an audience, especially in a specific region like Switzerland, it's crucial to get your music out there. Venues and promoters rely on numbers to assess the financial viability of booking you for a gig or festival. Therefore, before planning a Swiss tour, artists should prioritise a strategy to get their music heard. This also applies to your marketing strategy and social media presence.
- **Language:** The aspect mentioned above goes hand in hand with what was discussed at the very beginning of this report about languages. If the primary language of an artist's music is French, they might want to focus on the French part of Switzerland and not necessarily on the German part.
- **Pioneers:** If you do not have a significant audience already in Switzerland but still want to try to set up a gig, it is always a great idea to look for artists with a similar sound to yours who have had a gig in Switzerland previously. It turns out that venues that have hosted musicians from a specific country previously, are much more likely to do this again and also have already established some sort of partnership with a respective representative from that country.

- **Booking Agency:** The most obvious and seemingly easiest option to play a gig in Switzerland is to have local representation in the form of a booking agency that will represent your interests and take care of the booking for you.
- **PR**: Once a gig is in the books, it is vital to make sure that you will have an audience attending. Promotion can happen through social media, paid or not, a PR agency, which might incur a significant cost or any combination thereof. An additional aspect is to invite music professionals to secure future bookings or even become part of a roster of an agency.
- **Database:** A great tool to get an idea of the Swiss landscape and what venues might fit your artistic style is the directory of this database.

*This database is not regularly updated. However, it still provides a great overview of what opportunities there might be.

[*This section has been formulated with further input from Roberto Haçaturyan, artlink*]

5. Recorded Music Sector

The Swiss recorded music market achieved a total revenue of CHF 233.9 million in 2023, 5% more than the previous year (IFPI, 2024). Music streaming alone, through services such as YouTube, Apple Music, or Spotify, grew to CHF 206.1 million (+8%), now accounting for 88% of the total market. As stated previously, there are still some reservations about paying for the respective services, but the overall perception is that the market still has room to keep growing.

Streaming services like Spotify offer a vast selection of international artists, making it challenging for Swiss artists to gain traction on these platforms and benefit from their recommendation algorithms.

However, Switzerland boasts a vibrant independent label scene, particularly in the German and French regions, offering a strong counterpoint to the major labels.

5.1. Recorded Music Industry in Figures

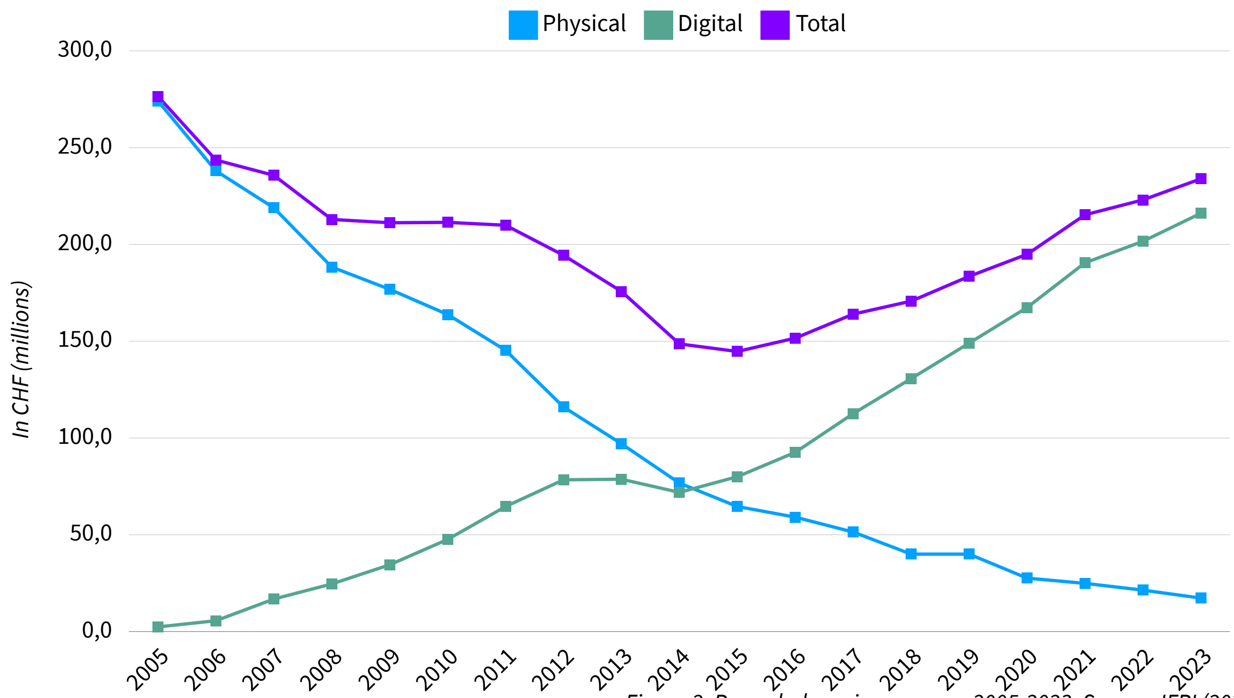


Figure 2. Recorded music revenues, 2005-2023. Source: IFPI (2023)

These numbers displayed in the graph above provided by IFPI Switzerland are aggregated by the international market research company GFK Entertainment, reflecting the entire market and not just IFPI members.

As mentioned in the introduction to the Recorded Music Sector in Switzerland and shown above, revenues through streaming services are consistently increasing, whereas the sale of physical assets keeps steadily decreasing. However, despite this decline, the physical market still remains at around 8% of the overall market, which amounts to approximately CHF 20 million. Therefore, it might still be worth considering selling CDs or Vinyl as part of a merchandising strategy, depending on the target group.

5.2. Main Actors in the Recorded Music Industry

In Switzerland, all three major labels are present. However, not all of them are equally actively invested in the Swiss music scene since the main goal is often to further advance their international acts in the Swiss market instead.

Besides the majors (Universal Music Group, Sony, Warner Music), there are several active and successful independent labels.

Phonag Records
With over six decades of experience in the industry, Phonag Records is one of the most important independent record labels in Switzerland.

Mouthwatering Records
Mouthwatering Records is a Switzerland-based independent label publishing, management and artist development company run by Andreas Ryser and Daniel Jakob.
Examples: Black Sea Dahu

Irascible Records
Irascible started in 2001 aiming to provide music retailers with international and Swiss independent labels. Two decades later, Irascible Music has become a distribution, promotion and publishing company for many international and Swiss labels/artists, a PR agency for music festivals and, at last, a record label.

Others

- **Hitmill**
- **Bakara**
- **Bongo Joe**
- **Musikvertrieb**
- **NoHook**
- **Two Gentlemen**
- **Young & Aspiring**

For a full list of labels, check IndieSuisse or IFPI.

5.3. Digital Distribution

Besides the usual digital distributors found globally, Switzerland has these distributors that also operate on a global scale:

- **iGroove**
- **iMusician**

5.4. Physical Distribution

The physical distribution channel's contribution to the overall recorded music industry revenues also shrank in 2017 at a double-digit pace. Today, it accounts for only a small portion of the overall market (PwC, 2022). In this context, the decline in CD sales follows the expected trend of the past few years. Yet, the segment remains important due to the considerable size of the market.

Therefore, as mentioned above, depending on genre and target audience, it might very well be worth bringing physical assets for sale, especially when touring or performing actively. Additionally, physical distribution may also function through direct sales to the listener facilitated through other channels, such as Bandcamp.

Traditional record stores have become a rarity in the Swiss music landscape and therefore they are hard to distribute to.

6. Music Publishing & Synch Sector

The following description of the music publishing sector is based on an interview with **Claudia Kempf, Head of the Members Department at SUISA** and an expert when it comes to publishing in Switzerland.

Kempf highlights that the dynamics of music publishing in Switzerland vary greatly by genre. There are still publishers whose core business consists of publishing sheet music, which mostly applies to the classical music sector and therefore might not be of major importance when discussing the potential of music publishing for new music in other genres and scenes in Switzerland.

Swiss publishers often struggle to compete internationally. They cannot offer the same upfront advances as larger international players, leading many successful performers (including Swiss ones) to seek more lucrative publishing deals abroad.

However, a new trend is emerging. Recognising the potential of successful beats, publishers are now actively seeking out beatmakers, of which Switzerland has several successful examples (such as OZ).

Overall, the publishing divisions of the major multinational music companies account for a large portion of the revenue generated by the industry.

Kempf emphasises the vibrancy of the publishing industry. Publishers have been rapidly acquiring legacy catalogues over the last few years in order to maximise their back catalogues.
Increased awareness of music publishing has spurred activity among smaller players, particularly independent labels. As a result, the Swiss market holds the big publishing houses of the major labels, as well as many smaller publishers who are equally active.

That being said, a lot of artists in Switzerland are self-released. However, if they get a publishing deal, the publisher will try to commercially leverage a musical work, which mostly materialises in sync i.e ads and/or TV placements.

Since there are many aspects of earning royalties besides traditional copyright (such as graphic rights, sync rights, adaptation rights, etc.), this may present a promising opportunity. The future of this industry, however, will be widely determined by the development and regulation of AI and its usage, since this most likely will affect an important portion of the future publishing aspect.

6.1. Music Publishing Industry in Figures

Claudia Kempf also highlights how data on the Swiss music publishing industry primarily comes from SUISA's annual reports, which aggregate revenue distributed to their members. The payments to publishers far exceed those to authors. This is because the major international publishers are directly affiliated with SUISA, which manages and licences the world repertoire. Therefore, it is somewhat challenging to obtain numbers solely applicable to the Swiss industry, since their accounting does include the additional repertoire not only affiliated with Swiss artists or publishing in Switzerland (SUISA, 2022).

Despite the challenge of isolating purely Swiss market data, SUISA's annual report remains a valuable resource. It provides detailed reporting and numbers on the amounts paid out for music publishing in different scenarios, which serves as a great point of reference.

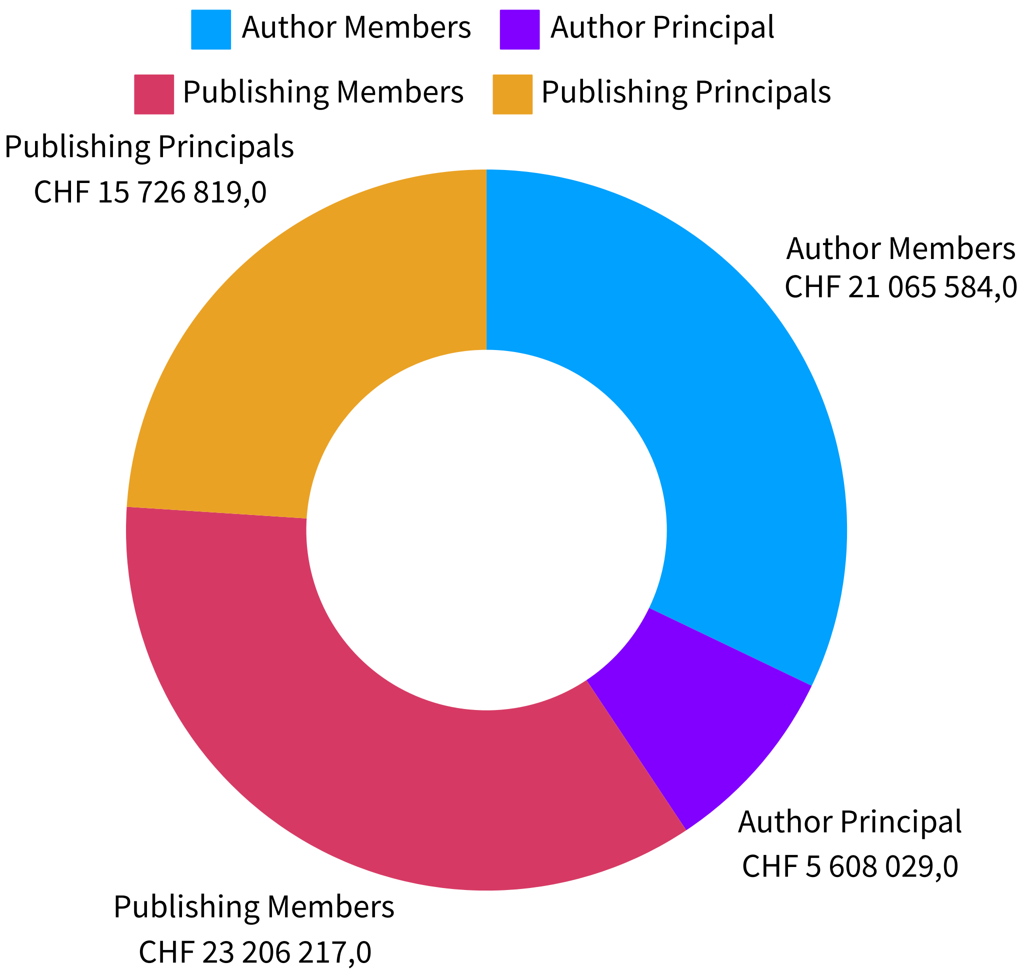


Figure 7. Amounts paid out by SUISA in 2022. Source: SUISA (2022). Annual Report (Geschäftsbericht und Generalversammlung).

6.2. Main Actors in the Music Publishing Industry

The music publishing market is well-established in Switzerland. The major publishers manage in the Swiss market from Germany. Various independent publishers from neighbouring countries are also directly active in the Swiss market due to language compatibility. In addition, over 1000 publishers are based in Switzerland, and many of them are small entities. About 50 publishers represent larger catalogues and some of them are also active as independent sub-publishers.

Claudia Kempf, Head of Members Department at SUISA, notes a consolidation in the market larger publishers buying up legacy catalogues to maximise their back catalogues. According to Claudia Kempf music publishing and its dynamic in the Swiss market depends to a large extent on the genre that is discussed. As traditionally the case, there are still publishers whose core business consists of publishing sheet music, which mostly applies to the classical music sector, choral music, wind music and educational repertoire. Growing awareness of the publishing side of the music industry has likely fueled increased activity among smaller players, particularly independent labels. That being said, a lot of artists in Switzerland are still self-released.

Swiss publishers are in competition with publishers in neighbouring countries that have greater market access. This is why Swiss publishers often conclude co-publishing deals with publishers abroad.

A list of independent publishing companies is available on the website of the Swiss Music Publishers' Association SVMV.

6.5. A Brief Overview of the Synch Sector

In Focus: The Synch Industry in Switzerland

I*nterview with music supervisor Sara Schaer*

The synch sector in Switzerland is relatively small, due to the size of the overall market. However, Sara Schaer, one of the few music supervisors in Switzerland, shared some information and context

In general, Sara described synch to be an extremely highly valued market at the moment, that gained momentum through streaming services such as Netflix, which have a very high output in productions, for which they continuously need music. Therefore, she sees an overall increased need for music in film and series, which provides increased opportunities for artists.
Sara described the sync market as highly valued, fueled by the growth of streaming services like Netflix. Their high-output production model drives a continuous need for music. Additionally, the rising popularity of song placements over traditional film scores further expands the market and increases opportunities for artists.

As she describes the role of a music supervisor in Switzerland, she points out the difference to the understanding of a music supervisor in the US, where they usually get to control much more of the whole process of placing music in film - ranging from providing a selection of applicable music for the need to taking care of the clearances.

In Switzerland, however, her role is very much a legal and administrative one, where film producers mostly approach her with a clear idea of what song they would like to have for their production therefore her service consists of trying to navigate the publishing situation for those pieces and clear the rights within the planned budget.

Within that, sometimes the opportunity for her arises, to suggest something or to provide an alternative to a selected piece for which the licence cannot be obtained for some reason.

Also, she mentions that oftentimes a cover of a specific desired song is recorded and used for the production since this reduces the cost due to the elimination of paying for the master.

Similar to nearly all other elements to enhance a sustainable music career, this process mostly requires the artist to have an established standing on streaming platforms, since film producers or even supervisors tend to choose something they have heard and found suitable and/or liked.

Sara Schaer emphasises that Spotify is one of the most commonly used tools. This, yet again, goes back to an overall strategy - having a solid structure, and a marketing plan and gaining audiences overall, automatically increasing the chances of a film producer or music supervisor hearing your music and wanting to place it in a production. When audiences already know a piece of music, it also awards the visual with a higher emotional impact, which again reconfirms that already well-known tracks tend to be favoured.

Furthermore, she says that advertisers in Switzerland tend to produce the music themselves or as a work-for-hire, which reduces their cost in licensing music. Lastly, Sara Schaer explains that it certainly can make an impact to be represented by a music publishing company or a label, since it makes it easier to be found as an artist. She states that she regularly listens to playlists sent out by publishers to see if there is anything that could be appropriate for any of the works she is dealing with.

Metadata also plays an essential role here, as it helps to be placed in a context when someone is seeking specific tags in a catalogue.

7. Media and PR

The most important aspect of the music media landscape in Switzerland is the existence of public service media, which covers each of the language regions. This means that each of the language regions has a public service radio station, specifically SRF for the German part, RTS for the French part and RSI for the Italian part of Switzerland. Simultaneously, the most consumed TV channel is the national public channel. Since these media outlets are still regularly consumed by the Swiss population in a certain age bracket (40+), the music featured on any of those channels definitely can help promote an artist significantly. However, at the same time, social media is getting more and more traction and, depending on the respective target audience, is way more efficient to establish and enhance a social media presence as opposed to trying to have a feature on a radio station.

Nevertheless, there are a couple of valuable companies offering traditional PR services that have the potential to serve an artist coming from abroad to gain an audience in Switzerland, including but not limited to Lautstark, Mixtu Music, Irascible Music and Young and Aspiring.

7.1. Social Media

According to the results of a recent representative survey by the Swiss Broadcasting Corporation (SBC), 75% of respondents say they use social networks at least once a day. Only 5% of Swiss say they never use these platforms (Furrer, 2024). Another dataset states that a total of 7.29 million people in Switzerland are active on social media (Berisha, 2023). This number somewhat resembles the SBC report.

For Michael Latzer, a professor specialising in communication and media at the University of Zurich, the results of this survey “emphasise the high importance – even dependence – of the Swiss on these digital services, used as a daily routine or ritual”. The provided data shows that women use social media more often than men and, as expected, the younger age group (16-39) states that they use social media more frequently than the older generations. However, unfortunately, it is not further differentiated and, more than anything, it is not specified which platforms are used more widely than others.

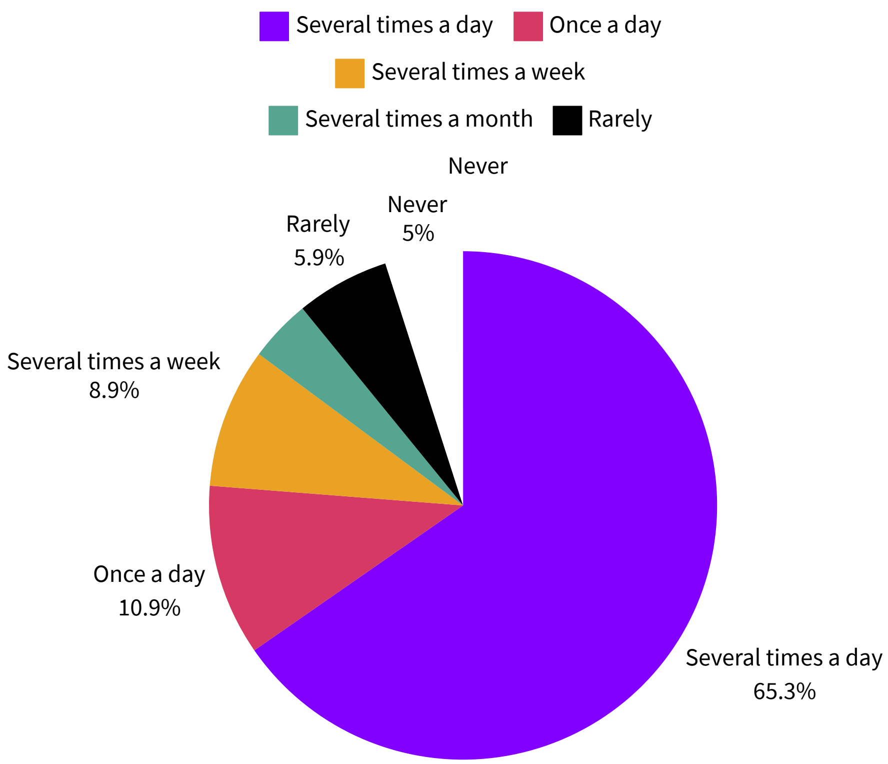


Figure 8: "How often do you use social media, such as WhatsApp, YouTube, Facebook, Instagram or TikTok" In % of the inhabitants of Switzerland aged 16 and over (n=7402).
Source: Furrer, Julien (2024). Three-quarters of Swiss use 'divisive' social media daily. Swissinfo.

Another research conducted back in 2022 showed that WhatsApp (87%), YouTube (80%), Facebook (48%) and Instagram (34%) were the most widely adopted social media platforms, it seems that there has been a shift to TikTok more recently (Peter, Niedermann & Zachlod et al 2022).

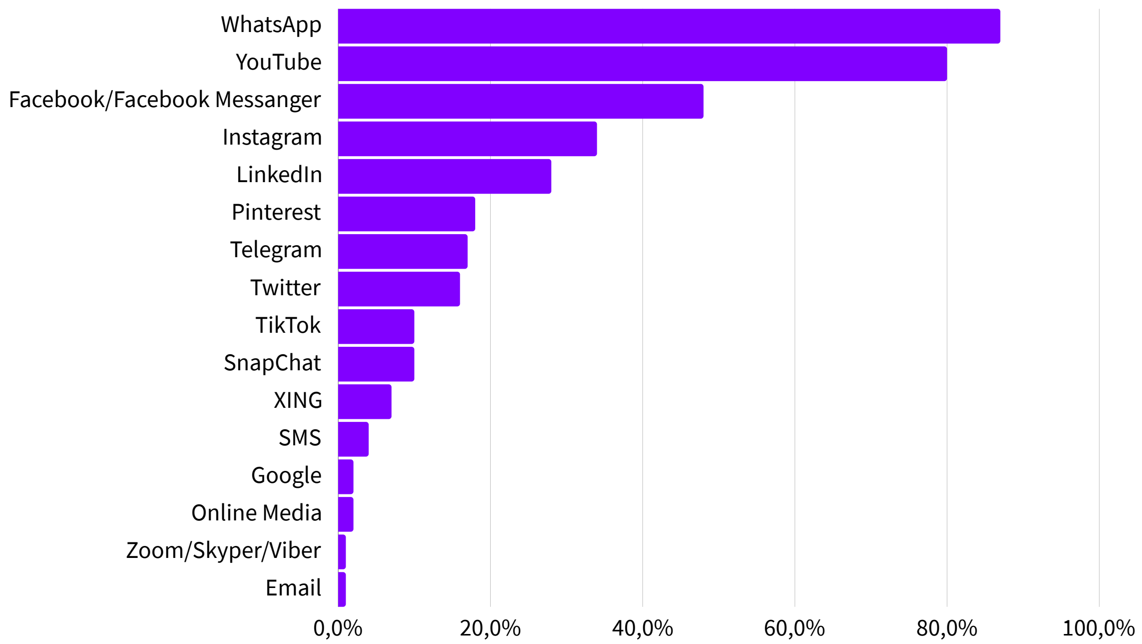


Figure 9. Use of social media platforms.
Source: Peter, Mark., Niedermann, André. & Zachlod, Cécile. et al (2022). Social Commerce Schweiz 2022. Page 23.

According to OneLine, Instagram and TikTok currently dominate the general awareness amongst the Swiss, whereas the distribution of a growing number of users seems to switch their screen time to TikTok, especially within Gen Z. An informative article released recently by TikTok does reveal the broad adoption of the app amongst Swiss citizens. It reports a total of 2.2 million monthly active users on the platform, which is almost 25% of the Swiss population (TikTok, 2024). As a result, one can assume that TikTok and leveraging the platform can help in establishing an audience in Switzerland, depending on the genre and the age group.

7.2. Written Media – Print and Online

Unfortunately, Switzerland has a limited music press landscape. The only dedicated music publications include:

Schweizer Musikzeitung
Rather geared towards musicians, this monthly paper informs on general questions of professionals in the music industry of all genres.

Musikzeitung Loop
This monthly music magazine discusses music, and concerts and actually provides a platform for national and international artists to be featured.

7.3. Radio

With the rise of streaming services and podcasting, the importance of radio has decreased dramatically throughout the last couple of years. However, depending on the radio station and their respective target audience, radio can still hold some importance when trying to develop an audience for recorded music, as well as for live music events. According to Roberto Haçaturyan, a music curator at one of Switzerland's public service radio stations, the more "intellectual audience" typically those aged 40-65, are more likely to take action after hearing music on the radio. This might involve buying a record or attending a concert by a new artist or band not previously known to them. Therefore, this is genre-specific in the sense that it does not necessarily apply to genres with high commercial value, such as Hip Hop, Rap, Pop or Electronica, but rather to Jazz, Global Sounds and Classical Music.

The public service radio stations are the following ones, distributed by language region:

Schweizer Radio und Fernsehen

- Radio SRF 1 (DAB+, Analogue FM)
- Radio SRF 2 Kultur (DAB+, Analogue FM)
- Radio SRF 3 (DAB+, UAnalogue FM)
- Radio SRF 4 News (DAB+)
- Radio SRF Musikwelle (DAB+)
- Radio SRF Virus (DAB+)

Radio Télévision Suisse

- La Première (DAB+, Analogue FM)
- Espace 2 (DAB+, Analogue FM)
- Couleur 3 (DAB+, Analogue FM)
- Option Musique (DAB+, Analogue FM)

Radiotelevisione svizzera di lingua italiana

- Rete Uno (DAB+, UKW analog)
- Rete Due (DAB+, UKW analog)
- Rete Tre (DAB+, UKW analog)

Swiss Satellite Radio

- Radio Swiss Classic (DAB+)
- Radio Swiss Jazz (DAB+)
- Radio Swiss Pop (DAB+)

Radiotelevisiun Svizra Rumantscha

- Radio Rumantsch (DAB+, UKW analog)

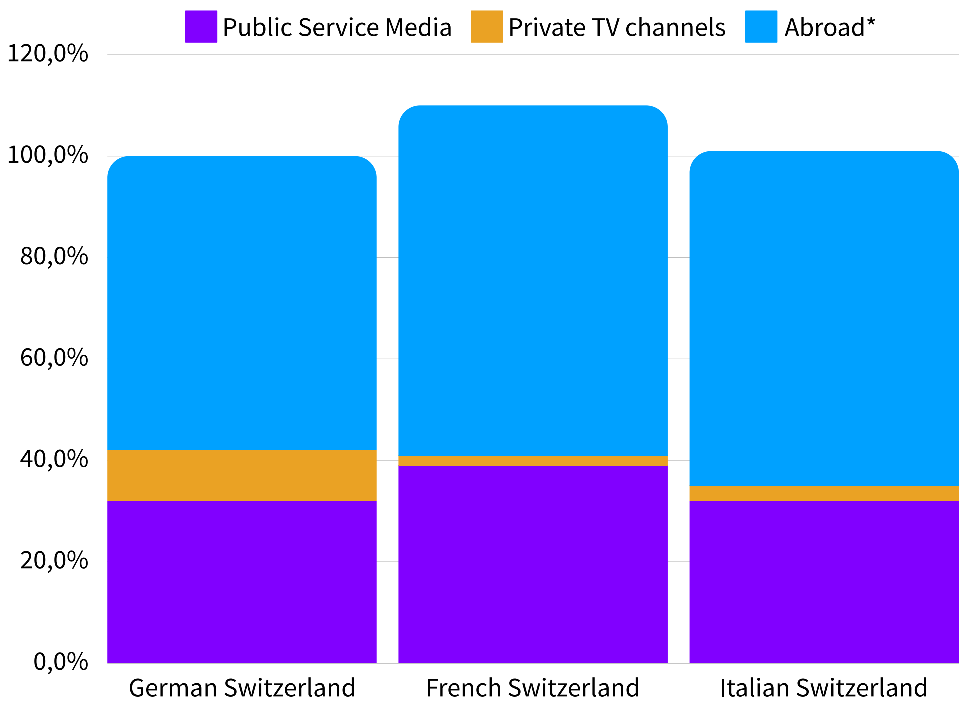
There are a number of private radio stations that occupy a significant portion of the market, such as Radio24, Radio Energy, and Radio Lac. Find a full list here VSP.

Simultaneously, there is a small number of radios that have founded a union named UNIKOM which stands for the union of not-profit-oriented local radios, which play an important role in the discovery of music for a niche audience.

Besides that, there are many more small niche radio stations - commercial or not - that are much more local and clearly less extensively consumed compared to public service stations.

7.4. Television

Similarly to the radio landscape, public service TV stations are the most widely consumed amongst the Swiss audience. The graph below provides a breakdown of the three most important ones. Interestingly, TV stations from abroad actually hold the biggest market share of TV consumption in Switzerland, as can be seen in a study from 2022. The most important TV stations in Switzerland are SRF1, SRF2 and SRFINFO.



**Abroad: TV stations consumed in Switzerland that do not originate in Switzerland.*

Figure 10. Market share of most important TV stations in Switzerland, 2022. Source: Bundesamt für Statistik (2022)

7.5. Developing a Marketing and PR Strategy

In Focus: Marketing and PR in Switzerland

This section is informed through a conversation with PR specialist Lukasz Polowczyk and the author who previously worked for the music team at TikTok Germany.

The value of traditional PR versus digital marketing is a hotly debated topic across the globe, with strong opinions on both sides. Lukasz Polowczyk's experience suggests that it is hardly worth it at this point, to invest a lot of money into traditional PR in Switzerland. In his experience, radio placings do not convert well into a stable following and the same goes for print media, which has become so rare that it became harder and harder to be featured at all.

Lukasz Polowczyk argues that traditional PR focused on broad media coverage across all channels with a large budget is no longer the most effective approach. Instead, he advises using the very limited airtime one gets wisely and trying to attract a very concrete niche with clear and compelling storytelling. Other than that, he says an artist might just «burn through their budget» with no significant effect.

This approach aligns with Joana's experience at TikTok, where it is all about finding your community who then become your most valuable and faithful fans, buying your merch and attending your shows. However, there has to be a compelling story..

Lukasz Polowczyk further explains that even if an artist is trying to get more traditional PR coverage, the statistics on the respective social media platforms matter a lot, since those guarantee the author or reporter a certain amount of traction themselves.

He goes as far as to suggest building up your social media platforms for 1-2 years as a newcomer before dropping an album and subsequently playing a tour.

Whereas this is a very futuristic perspective, Joana (the author of this report) does believe that, specifically in Switzerland, traditional media still provide some sort of credibility that might allow you to convince a booking agent to come see your show or a couple of listeners to come to your concert. Again here, it depends on the genre you are trying to work in.

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