Paid

Switzerland Brand Trends

first half of 2022

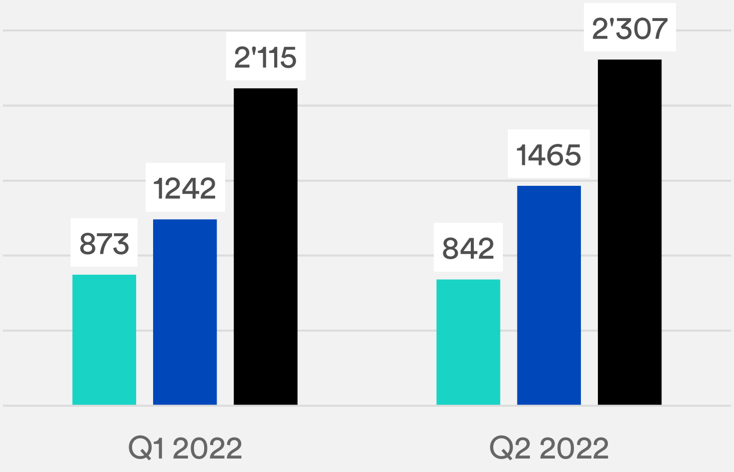
Earned

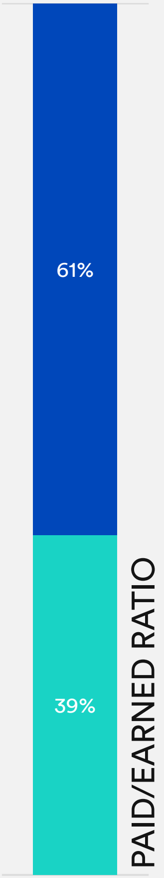
>300 brands
22 sectors

Total brand visibility

Switzerland Brand Trends, first half of 2022

TBVi	Paid	Earned
4.4 Mrd. CHF	1.7 Mrd. CHF	2.7 Mrd. CHF
Ø14.0 Mio. CHF	Ø 5.5 Mio. CHF	Ø 8.6 Mio. CHF





H1 2022

Total visibility 44.4 billion ⌀ 14.0 million per brand
The total visibility of the 315 brands recorded was CHF 4.4. billion gross in the first six months of 2022.

Ratio

Paid/earned ratio in favor of earned media
61% of total visibility is due to earned media, corresponding to CHF 2.7 billion. Conversely, gross advertising pressure makes up CHF 1.7 billion (39%).

+9%

Increase in visibility from Q1 to Q2
Total visibility increased in Q2 2022 by CHF 192 million (+9%). This was sparked by the earned presence. The beverage sector grew the most in percentage terms (+57%), followed by cleaning and insurance (each +52%). Pharmaceuticals & health saw the biggest drop in visibility (-41%).

Total industry visibility

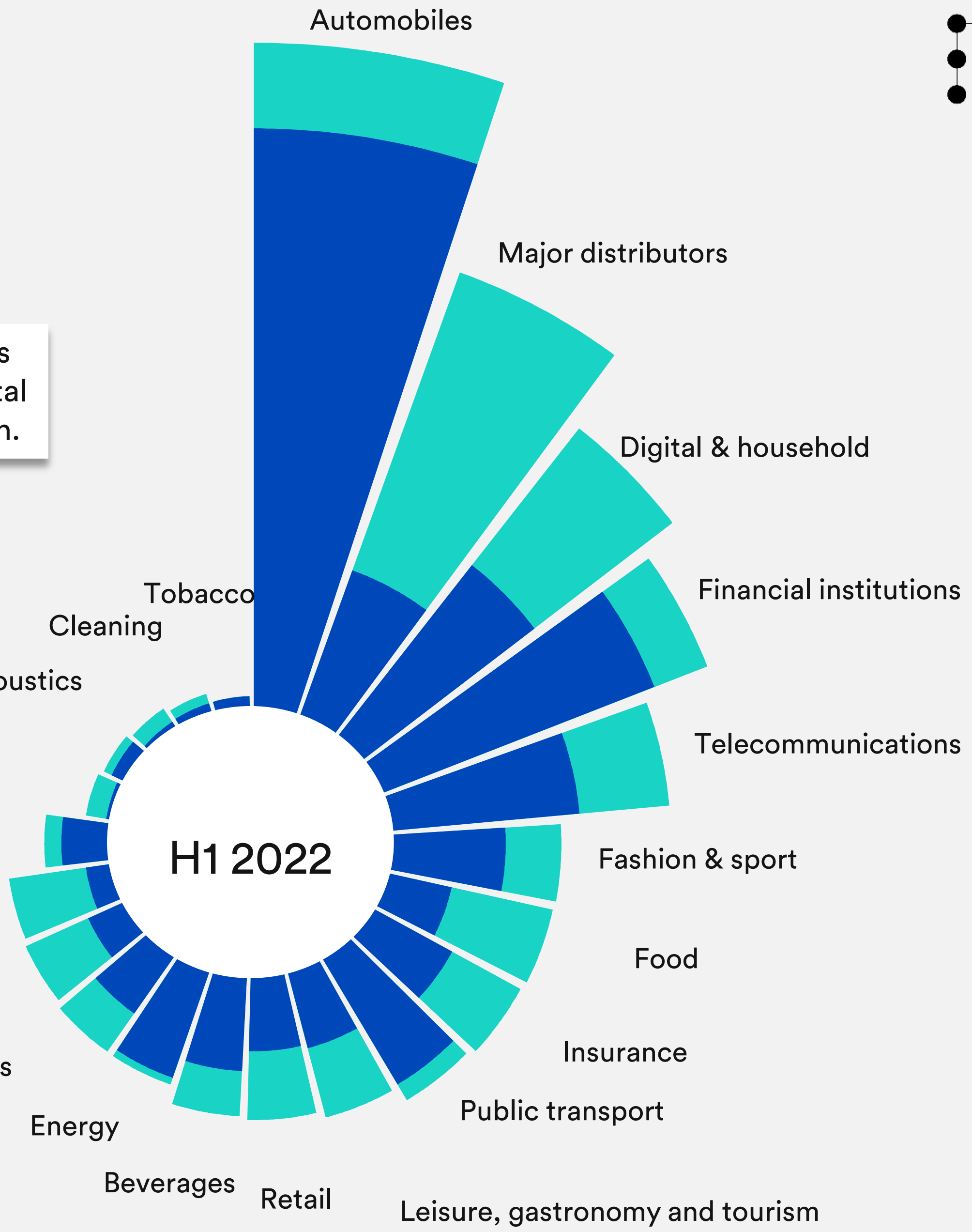
Paid media + earned media = total brand visibility

Thanks to earned media, automobiles remain the sector with the highest total brand visibility, by a significant margin.

The major distributors Migros, Coop etc. come in second in terms of total visibility, thanks to advertising pressure

Financial institutions take second place in earned media, but drop to fourth place overall.

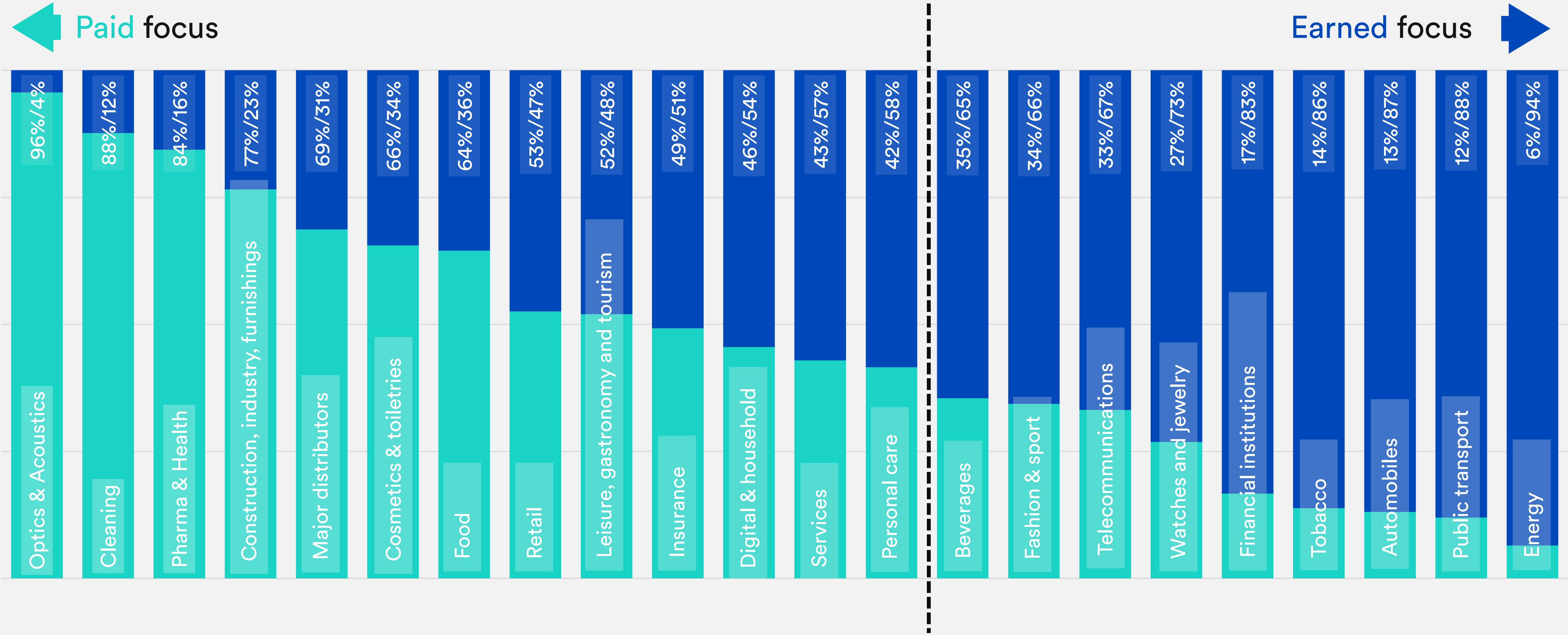
Insurance sees the most balanced paid/earned ratio (49%/51%).



Paid/earned ratio

Switzerland Brand Trends, first half of 2022

Swiss benchmark:
39%/61%

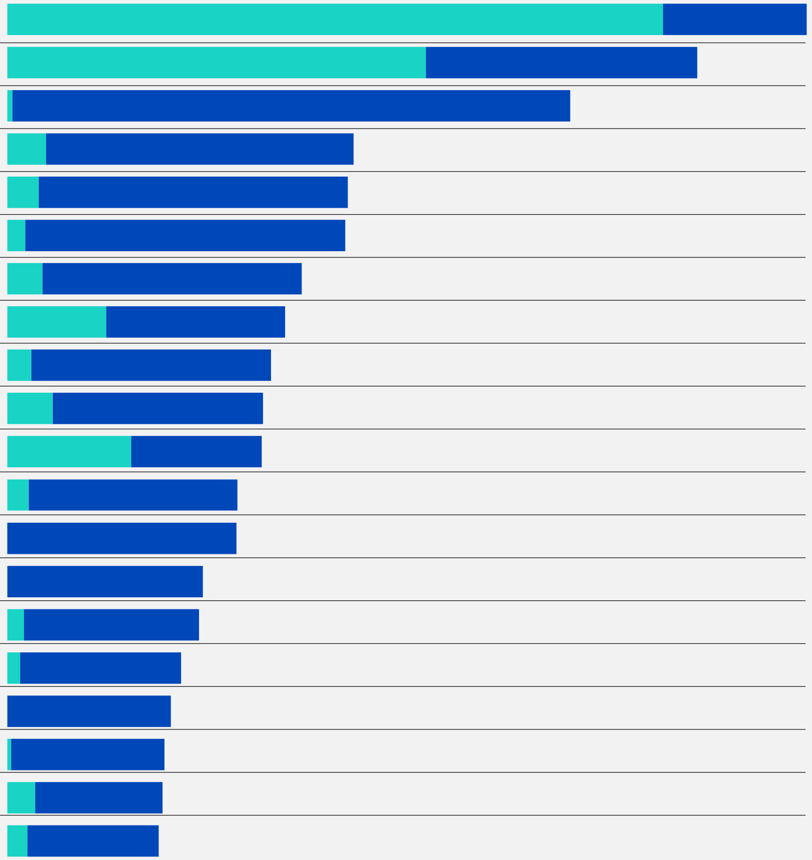


Total brand visibility

Switzerland Brand Trends, first half of 2022

Ranking of the top 20 brands

TBVi	Brand	Paid	Earned	Paid/earned ratio
1	Coop	1	17	82%/18%
2	Migros	2	5	61%/39%
3	Google	217	1	1%/99%
4	Apple	31	4	11%/89%
5	Credit Suisse	43	3	9%/91%
6	Mercedes	89	2	5%/95%
7	UBS	36	6	12%/88%
8	Amazon	5	12	36%/64%
9	SBB	64	7	9%/91%
10	VW	24	9	18%/82%
11	Swisscom	3	19	49%/51%
12	Red Bull	74	10	9%/91%
13	Tesla	312	8	0%/100%
14	Ferrari	-	11	0%/100%
15	BMW	102	13	9%/91%
16	Raiffeisen	126	15	7%/93%
17	Gazprom	-	14	0%/100%
18	Rega	239	16	3%/97%
19	Nestlé	57	20	18%/82%
20	Disney+	78	18	13%/87%



Coop was the most visible brand, followed by Migros, thanks to its advertising presence.

Ferrari, Gazprom and Tesla made it into the top 20 with next-to-no advertising.

The top 10 brands generate 27% of total visibility, the top 20 39%.

Automobiles were the most heavily represented, with 5 brands, followed by finance (3 brands),

Battle of the Brands

Automobiles

TOYOTA

2022

19%/81%

Paid/earned ratio

- Total 11/28
- Print news 10
- Print ads 8
- Online news 12
- TV ads 8
- YouTube ads 17
- OOH ads 11
- Search ads 3
- Radio ads 13
- Display ads 3
- Cinema ads 3

TESLA

2022

0%/100%

Paid/earned ratio

- Total 3/28
- Print news 3
- Print ads -
- Online news 2
- TV ads -
- YouTube ads 23
- OOH ads -
- Search ads 26
- Radio ads -
- Display ads -
- Cinema ads -

Paid media

Earned media

Total brand visibility

Channel #/ # Rank/number of brands

Battle of the Brands

Major distributors

ALDI SUISSE

Total
5/9

Print news
3

Print ads
6

Online news
3

TV ads
5

YouTube ads
6

OOH ads
7

Search ads
4

Radio ads
6

Display ads
6

Cinema ads
-

2022

38%/62%

Paid/earned ratio

LIDL

Total
3/9

Print news
5

Print ads
7

Online news
4

TV ads
3

YouTube ads
4

OOH ads
5

Search ads
3

Radio ads
3

Display ads
4

Cinema ads
3

2022

62%/38%

Paid/earned ratio

Paid media

Earned media

Total brand visibility

Channel
#/ #

Rank/number of brands

Battle of the Brands

Telecommunications

wingo

- Total 6/7
- Print news 5
- Print ads -
- Online news 5
- TV ads -
- YouTube ads 5
- OOH ads 3
- Search ads 3
- Radio ads -
- Display ads 5
- Cinema ads -

2022

92%/8%

Paid/earned ratio

yallo

- Total 7/7
- Print news 7
- Print ads 2
- Online news 6
- TV ads 4
- YouTube ads 4
- OOH ads 5
- Search ads 5
- Radio ads 3
- Display ads 6
- Cinema ads -

2022

94%/6%

Paid/earned ratio

- Paid media
- Earned media
- Total brand visibility
- Channel #/# — Rank/number of brands

Battle of the Brands

Financial institutions

Julius Bär

Total 8/16

Print news 9

Print ads 12

Online news 5

TV ads -

YouTube ads -

OOH ads 15

Search ads 11

Radio ads -

Display ads 13

Cinema ads -

2022

1%/99%

Paid/earned ratio

UBS

Total 2/16

Print news 1

Print ads 5

Online news 2

TV ads 10

YouTube ads 4

OOH ads 2

Search ads 2

Radio ads 5

Display ads 1

Cinema ads -

2022

12%/88%

Paid/earned ratio

Paid media

Earned media

Total brand visibility

Channel #/# Rank/number of brands

Battle of the Brands

Watches & jewelry

OMEGA

Total 3/15

- Print news 5
- Print ads 3
- Online news 2
- TV ads 1
- YouTube ads 1
- OOH ads 11
- Search ads 3
- Radio ads -
- Display ads 9
- Cinema ads -

2022

29%/ 71%

Paid/earned ratio

ROLEX

Total 2/15

- Print news 2
- Print ads 1
- Online news 3
- TV ads 3
- YouTube ads -
- OOH ads 12
- Search ads 2
- Radio ads -
- Display ads 4
- Cinema ads 1

2022

36%/64%

Paid/earned ratio

- Paid media
- Earned media
- Total brand visibility

Channel #/# — Rank/number of brands

Media coverage

Advertising presence is measured in gross advertising pressure. This is the equivalent value, as per the media tariff, for an individual broadcast, rather than the actual expenditure, cost or budget. Volume discounts, customer discounts or special discounts are not taken into account.

PRINT
Newspapers, magazines, trade and specialist press (incl. supplements)
379 titles

OUT OF HOME
Analog and digital billboard advertising

TV
Public and private
36 broadcasters

RADIO
21 private broadcasters

INTERNET
Display crawlers, search and YouTube advertising (pre-, post-, mid-rolls)

CINEMA
>500 cinemas

Media presence is calculated as the ad equivalent value. This figure is calculated offline on the basis of ad prices and online on the basis of factors including reach and TKPs.

PRINT NEWS
Newspapers, magazines, trade and specialist press
>130 titles
(unweighted)

ONLINE NEWS
News portals
>200 titles
(unweighted)

The brands with the highest advertising pressure in each sector were integrated (min. 75% coverage of sector advertising pressure, basis: top 500 advertisers) and supplemented by means of desktop research to include brands that are solely displayed in the media, such as Tesla. Media Focus does not claim that this information is exhaustive.

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