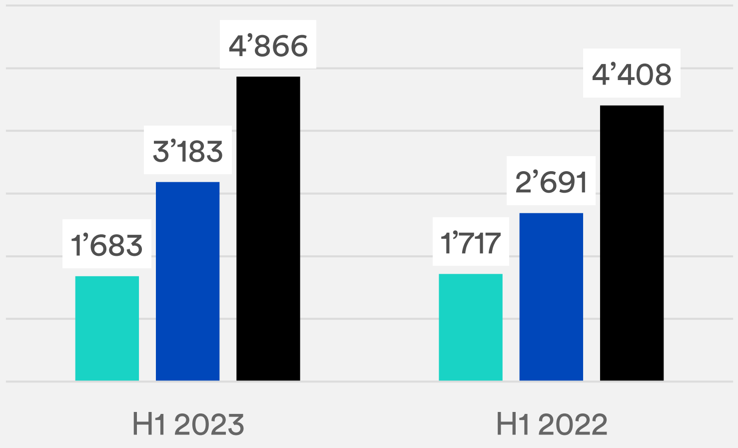
Switzerland Brand Trends
H1 2023

> 300 brands
22 sectors

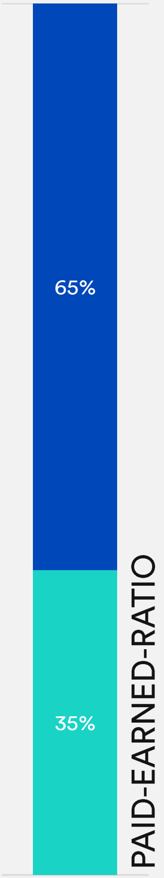
Total Brand Visibility

Switzerland Brand Trends H1 2023

TBVi	Paid	Earned
4.9 billion	1.7 billion	3.2 billion
Ø 15.4 million	Ø 5.4 million	Ø 10.1 million



In CHF millions



H1 2023

Total visibility 4.9 billion: avg. 15.4 million per brand
The total visibility of the 315 brands recorded amounted to CHF 4.9 billion gross in the first six months of 2023.

Ratio

Paid/earned ratio in favor of earned media
65% of total visibility is apportioned to earned media, corresponding to CHF 3.2 billion. Conversely, gross advertising pressure (35%) amounted to CHF 1.7 billion.

+10%

Visibility increase from H1 2022 to H1 2023
In the first half of 2023, total visibility increased by CHF 457.7 million (+10%) in comparison to the first half of 2022. The decisive factor in this is the increase in earned presence (+18%). Meanwhile, paid presence fell slightly (-2%). In terms of percentage, the highest increase in visibility (+88%) comes in the financial institutions sector (CS/UBS merger). On the other end, the energy sector has seen the largest drop in visibility (-31%).

Total Industry Visibility

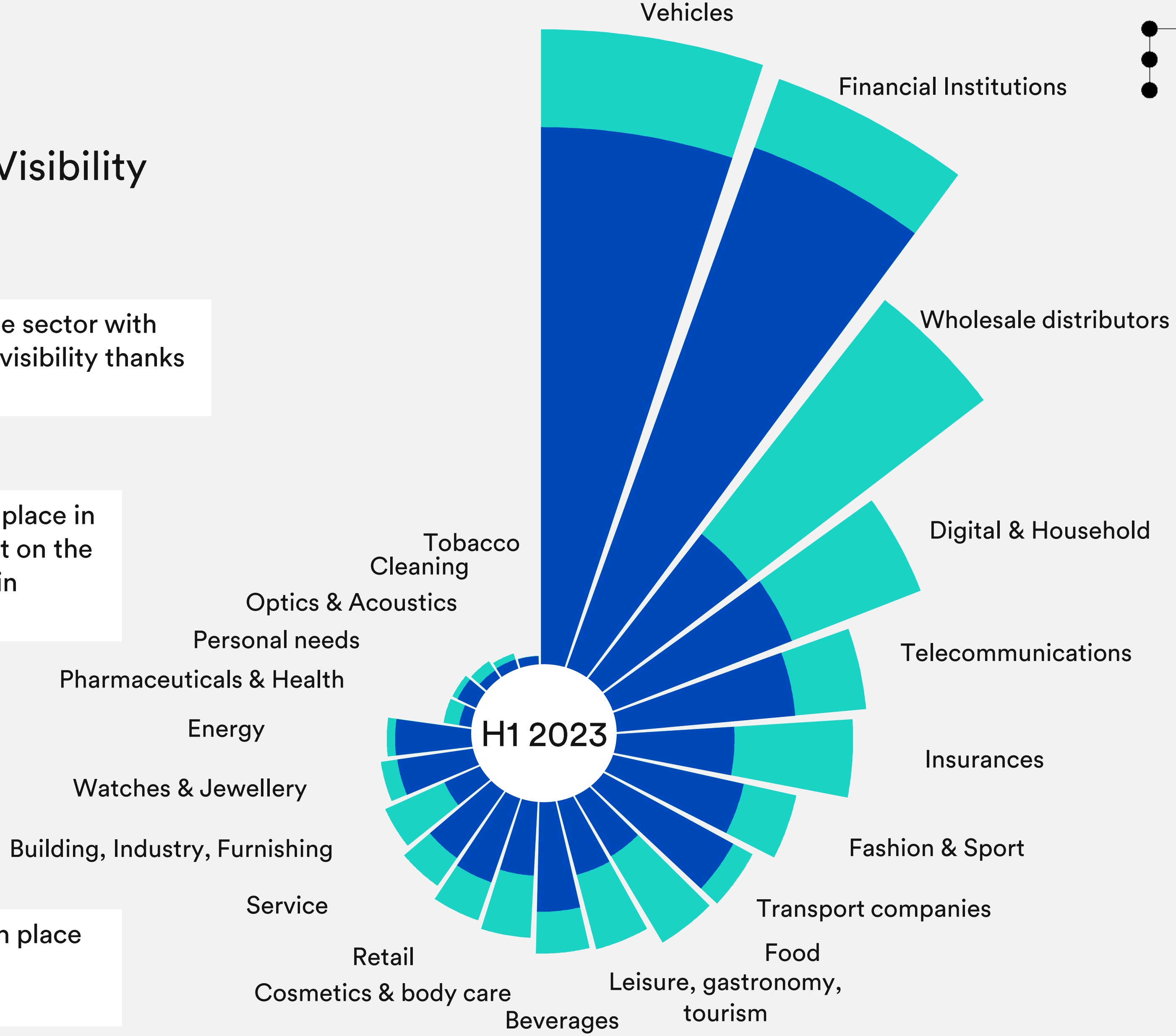
Paid Media + Earned Media = Total Brand Visibility

Automotive remains the sector with the highest total brand visibility thanks to earned media.

Although **financial institutions** take first place in earned media presence, they just miss out on the top spot for total brand visibility, landing in second place.

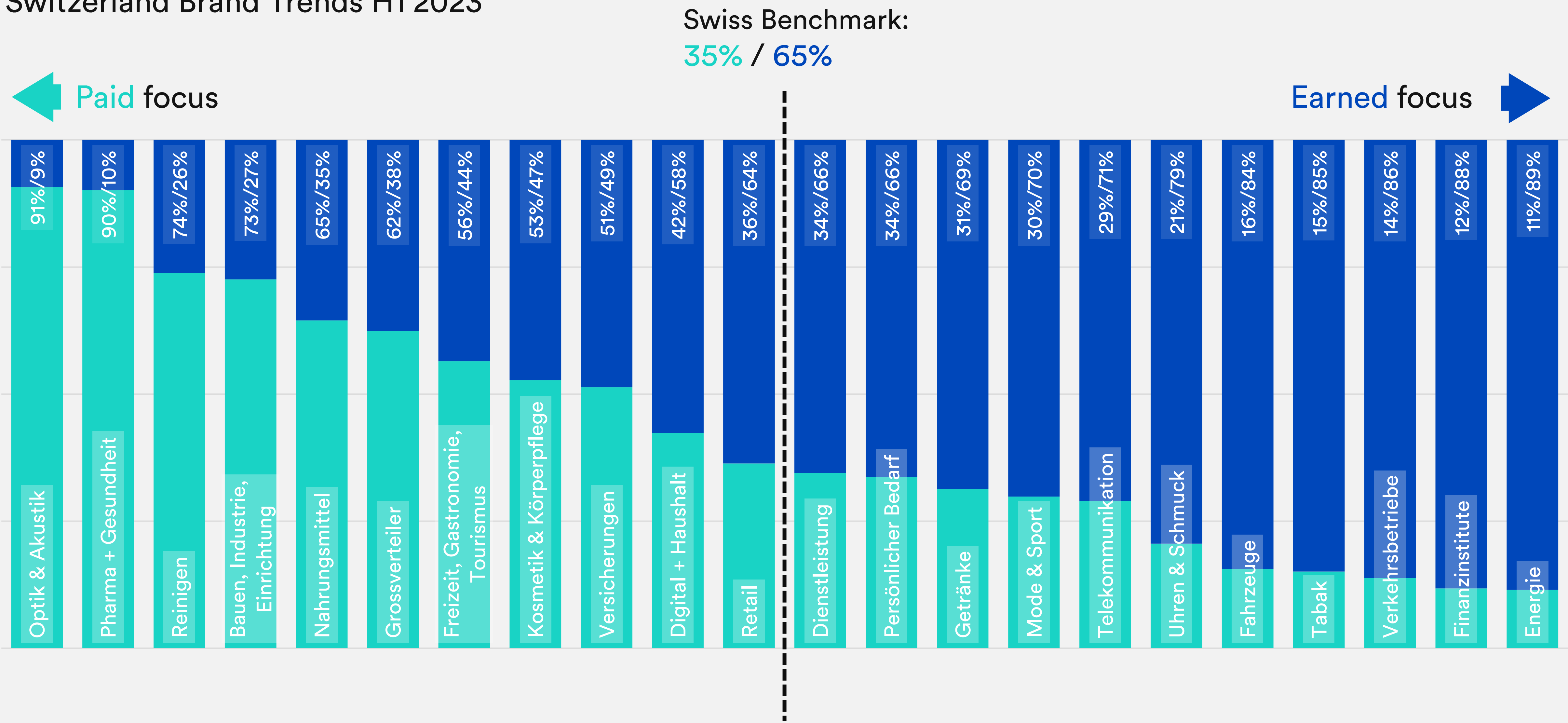
Major distributors such as Migros and Coop dropped one place in comparison to last year, and are now in third place.

Digital & household took fourth place with a comparatively balanced paid/earned ratio (42%/58%).



Paid-Earned-Ratio

Switzerland Brand Trends H1 2023

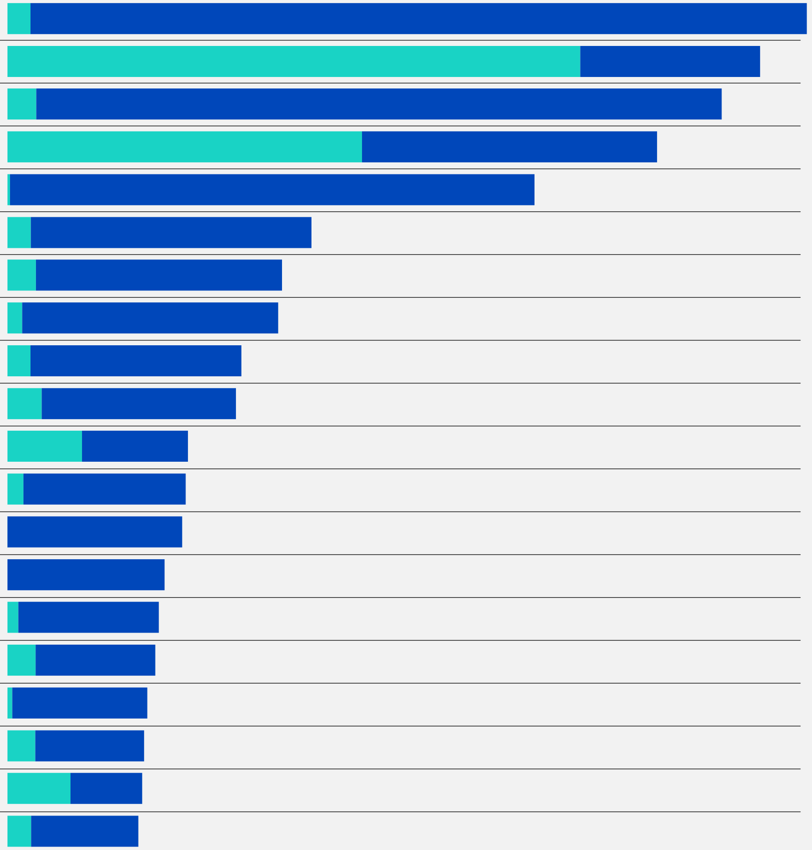


Total Brand Visibility

Switzerland Brand Trends H1 2023

Ranking top 20 brands

TBVi	Brand	Paid	Earned	Paid-Earned-Ratio
1	Credit Suisse	68	1	3%/97%
2	Coop	1	10	76%/24%
3	UBS	43	2	4%/96%
4	Migros	2	4	55%/45%
5	Google	248	3	0%/100%
6	SBB	64	5	8%/92%
7	Apple	44	7	10%/90%
8	Mercedes	101	6	5%/95%
9	Red Bull	66	8	10%/90%
10	VW	35	9	15%/85%
11	Swisscom	6	20	41%/59%
12	BMW	93	12	9%/91%
13	Tesla	309	11	0%/100%
14	Ferrari	-	13	0%/100%
15	Amazon	132	14	7%/93%
16	Raiffeisen	48	16	19%/81%
17	Rega	203	15	3%/97%
18	Audi	49	17	20%/80%
19	Postfinance	10	30	47%/53%
20	Nestlé	62	18	18%/82%



Credit Suisse is the most visible brand, followed by Coop with the strongest advertising presence.

Google, Tesla & Ferrari made it into the top 20 with hardly any advertising presence.

The top 10 brands generate **31%** of the total visibility, with the top 20 generating **41%.**

Automotive is most strongly represented with six brands, followed by **financial institutions** with four brands.

Battle of the Brands

Finance

RAIFFEISEN

H1 2023

19% / 81%

Paid-Earned-Ratio

Total	3 / 16
Print News	3
Print Ads	1
Online News	3
TV Ads	5
YouTube Ads	7
OOH Ads	2
Search Ads	13
Radio Ads	6
Display Ads	10
Cinema Ads	2

Zürcher Kantonalbank

H1 2023

12% / 88%

Paid-Earned-Ratio

Total	5 / 16
Print News	4
Print Ads	5
Online News	5
TV Ads	8
YouTube Ads	8
OOH Ads	7
Search Ads	12
Radio Ads	–
Display Ads	7
Cinema Ads	–

Paid Media

Earned Media

Total Brand Visibility

Kanal #/ # – Rank/number of brands

Battle of the Brands

Vehicles

VOLVO

Total
15 / 28

Print News
17

Print Ads
9

Online News
19

TV Ads
7

YouTube Ads
2

OOH Ads
8

Search Ads
16

Radio Ads
5

Display Ads
15

Cinema Ads
-

H1 2023

41% / 59%

Paid-Earned-Ratio

SUZUKI

Total
17/ 28

Print News
21

Print Ads
5

Online News
15

TV Ads
-

YouTube Ads
15

OOH Ads
10

Search Ads
7

Radio Ads
14

Display Ads
19

Cinema Ads
15

H1 2023

26% / 74%

Paid-Earned-Ratio

Paid Media

Earned Media

Total Brand Visibility

Kanal
#/ #

Rank/number of brands

Battle of the Brands

Beverages

Coca-Cola

Total	2 / 15
Print News	2
Print Ads	4
Online News	2
TV Ads	4
YouTube Ads	5
OOH Ads	3
Search Ads	–
Radio Ads	2
Display Ads	7
Cinema Ads	1

H1 2023

33% / 67%

Paid-Earned-Ratio

FELDSCHLÖSSCHEN

Part of the Carlsberg Group

Total	4 / 15
Print News	6
Print Ads	6
Online News	13
TV Ads	1
YouTube Ads	10
OOH Ads	2
Search Ads	–
Radio Ads	–
Display Ads	6
Cinema Ads	3

H1 2023

81% / 19%

Paid-Earned-Ratio

Paid Media

Earned Media

Total Brand Visibility

Kanal #/ # – Rank/number of brands

Battle of the Brands

Digital & household

Electrolux

Kanal	Rank/number of brands
Total	15 / 30
Print News	12
Print Ads	11
Online News	25
TV Ads	6
YouTube Ads	9
OOH Ads	7
Search Ads	11
Radio Ads	–
Display Ads	15
Cinema Ads	–

H1 2023

76% / 24%

Paid-Earned-Ratio

V-ZUG

Kanal	Rank/number of brands
Total	17 / 30
Print News	16
Print Ads	18
Online News	14
TV Ads	13
YouTube Ads	6
OOH Ads	19
Search Ads	17
Radio Ads	–
Display Ads	16
Cinema Ads	–

H1 2023

48% / 52%

Paid-Earned-Ratio

- Paid Media
- Earned Media
- Total Brand Visibility

Kanal #/ # Rank/number of brands

Battle of the Brands

Fashion & sport

OCHSNER SPORT

H1 2023

53% / 47%

Paid-Earned-Ratio

- Total: 12 / 32
- Print Ads: 5
- TV Ads: 4
- OOH Ads: 11
- Radio Ads: 5
- Cinema Ads: -
- Display Ads: 3
- Search Ads: 11
- YouTube Ads: -
- Online News: 12
- Print News: 18

DECATHLON

H1 2023

65% / 35%

Paid-Earned-Ratio

- Total: 16 / 32
- Print Ads: 16
- TV Ads: -
- OOH Ads: 1
- Radio Ads: 6
- Cinema Ads: -
- Display Ads: 5
- Search Ads: 10
- YouTube Ads: 3
- Online News: 19
- Print News: 15

Paid Media

Earned Media

Total Brand Visibility

Kanal #/ #: Rank/number of brands

Battle of the Brands

Retail

MANOR

H1 2023

45% / 55%

Paid-Earned-Ratio

Total	2 / 11
Print Ads	3
TV Ads	1
OOH Ads	2
Radio Ads	1
Cinema Ads	-
Display Ads	1
Search Ads	2
YouTube Ads	1
Online News	2
Print News	3

Jelmoli

H1 2023

19% / 81%

Paid-Earned-Ratio

Total	5 / 11
Print Ads	-
TV Ads	-
OOH Ads	-
Radio Ads	-
Cinema Ads	-
Display Ads	-
Search Ads	6
YouTube Ads	9
Online News	3
Print News	5

Paid Media

Earned Media

Total Brand Visibility

Kanal #/ # — Rank/number of brands

Battle of the Brands

Cosmetics & toiletries

GARNIER

H1 2023

55% / 45%

Paid-Earned-Ratio

Total	9 / 19
Print Ads	3
TV Ads	7
OOH Ads	5
Radio Ads	–
Cinema Ads	–
Display Ads	5
Search Ads	10
YouTube Ads	5
Online News	8
Print News	6

MAYBELLINE NEW YORK

H1 2023

70% / 30%

Paid-Earned-Ratio

Total	11 / 19
Print Ads	4
TV Ads	9
OOH Ads	7
Radio Ads	–
Cinema Ads	–
Display Ads	–
Search Ads	6
YouTube Ads	4
Online News	13
Print News	11

Paid Media

Earned Media

Total Brand Visibility

Kanal #/ # 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.

Media presence is quantified 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
Newspapers, magazines, trade press 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

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

ONLINE NEWS
News portals
>200 titles
(unweighted)

The brands with the highest advertising pressure in each sector are 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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