Switzerland Brand Trends

2023

Paid

Earned

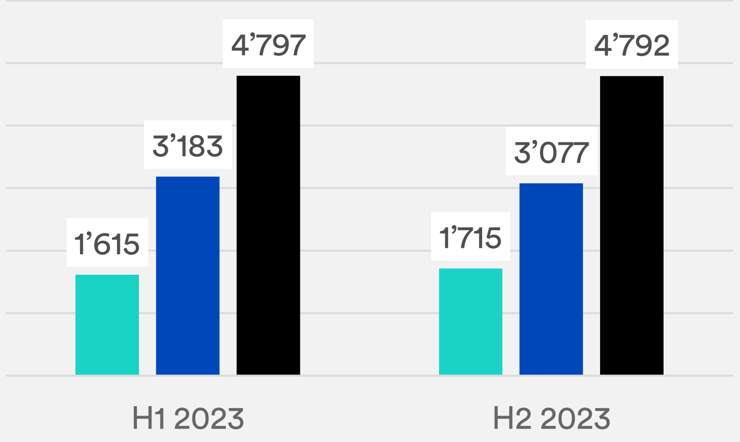
316 brands
22 sectors

Total Brand Visibility

Switzerland Brand Trends 2023

316 Brands

TBVi	Paid	Earned
9.6 billion CHF	3.3 billion CHF	6.3 billion CHF
Ø 30.3 million CHF	Ø 10.5 million CHF	Ø 19.8 million CHF
+4.6% +/- PY%	-9.4% +/- PY%	+13.9% +/- PY%



In CHF millions

2023

Total brand visibility 9.6 billion: ⌀ 30.3 million per brand
The total brand visibility of the 316 recorded brands amounted to 9.6 billion gross francs in 2023.

Ratio

Paid-earned ratio in favor of earned media
Earned media accounts for 65% of total brand visibility, which corresponds to CHF 6.3 billion. This contrasts with CHF 3.3 billion in gross advertising pressure (35%).

H1 = H2

Visibility almost unchanged in H1 2023 and H2 2023
Overall visibility is practically identical in H2 2023 compared to H1 2023 (-0.12%). The decline in earned presence (-3.3%) is offset by the increase in paid presence (+6.2%). The biggest driver for the decline in earned presence was the flattening of the media discussion about the UBS/CS merger. In percentage terms, the highest increase in visibility was recorded by the **Cleaning** sector (+89%), followed by the **Personal needs** sector (+48%). On the other hand, the **Financial Institutions** sector recorded the biggest drop in visibility (-26%).

Total Industry Visibility

Paid Media + Earned Media = Total Brand Visibility

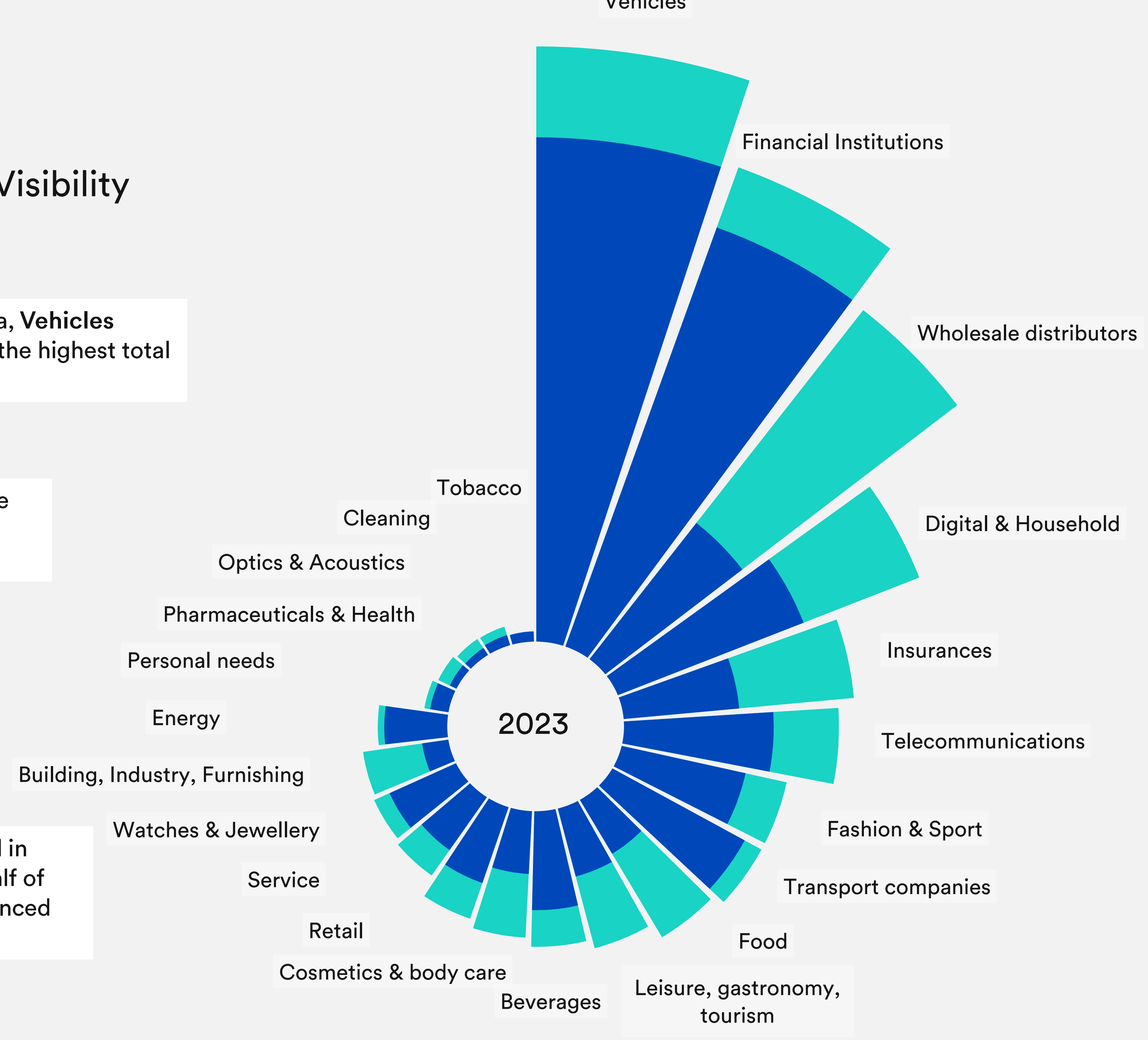
316 Brands

Thanks to earned media, **Vehicles** remain the sector with the highest total brand visibility.

Despite the decline in earned media in the second half of the year (-26%), **Financial Institutions** remain in second place.

The **Wholesale distributors** Migros, Coop & Co. remain in third place thanks to their strong advertising presence.

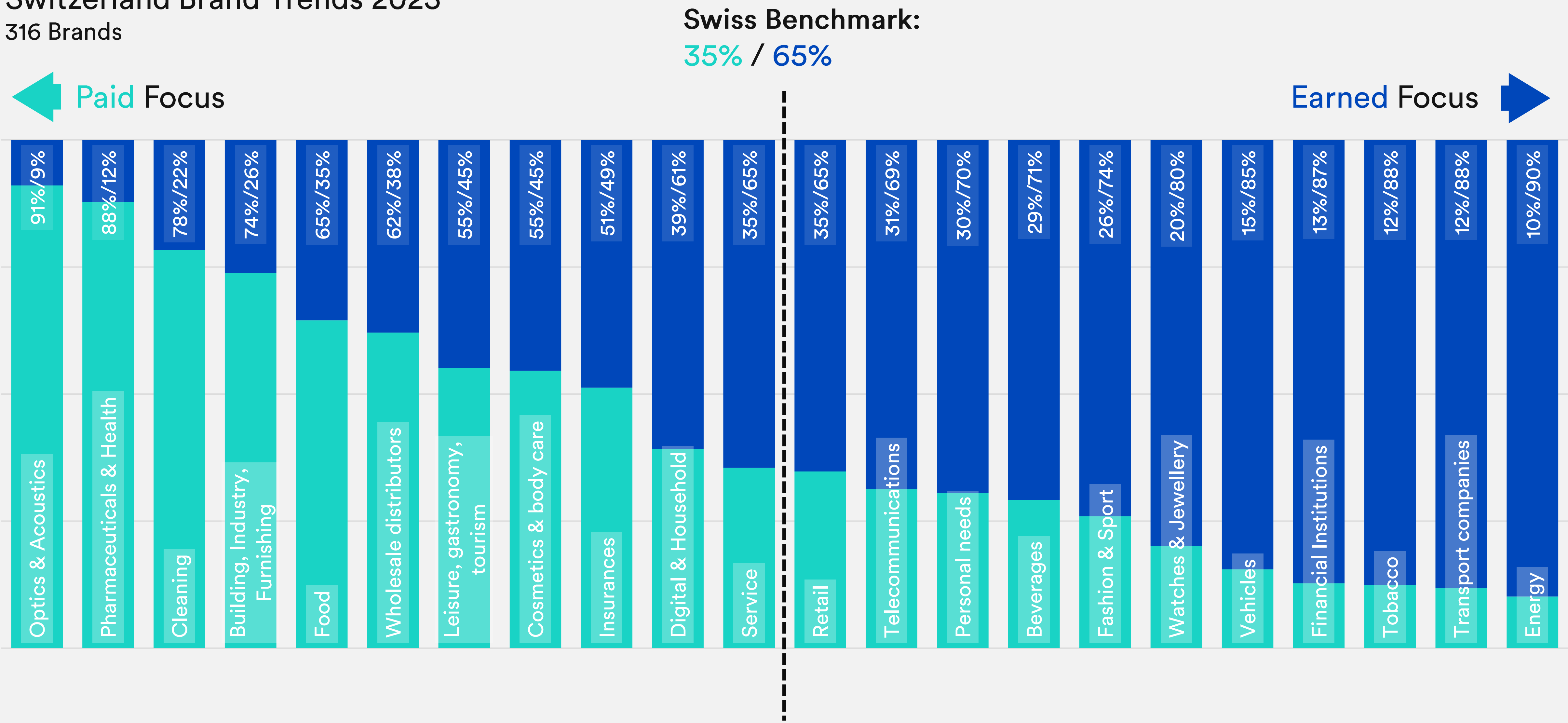
And **Digital & Household** is still in fourth place after the second half of the year with a slightly less balanced paid/earned ratio (39%/61%).



Paid-Earned-Ratio

Switzerland Brand Trends 2023

316 Brands



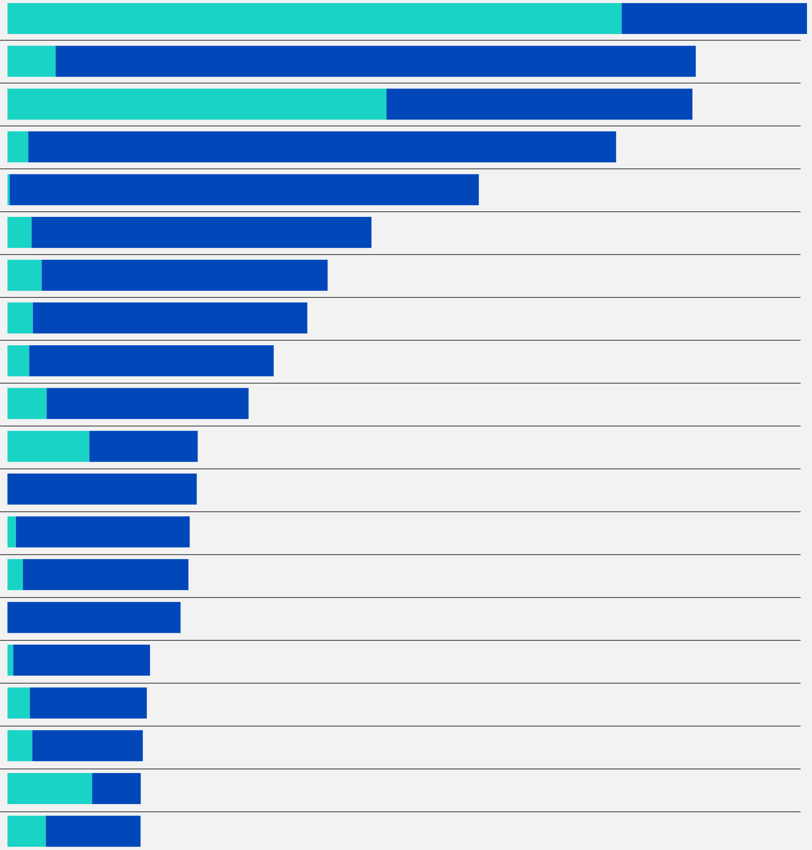
Total Brand Visibility

Switzerland Brand Trends 2023

316 Brands

Ranking Top 20 Brands

TBVi	Brand	Paid	Earned	Paid-Earned-Ratio
1	Coop	1	11	77%/23%
2	UBS	24	1	7%/93%
3	Migros	2	5	55%/45%
4	Credit Suisse	70	2	3%/97%
5	Google	249	3	0%/100%
6	SBB	62	4	7%/93%
7	Apple	37	6	11%/89%
8	Mercedes	57	7	8%/92%
9	Red Bull	65	8	8%/92%
10	VW	29	9	16%/84%
11	Swisscom	6	22	43%/57%
12	Tesla	307	10	0%/100%
13	Amazon	162	12	5%/95%
14	BMW	100	14	8%/92%
15	Ferrari	301	13	0%/100%
16	Rega	198	15	4%/96%
17	Nestlé	64	17	16%/84%
18	Audi	58	20	18%/82%
19	Galaxus	5	50	63%/37%
20	TCS	30	26	29%/71%



Coop with highest paid presence, most visible brand overall, **UBS** in 2nd place.

Google, Tesla & Ferrari make it into the top 20 with virtually no advertising presence.

Top 10 brands generate 30%, the top 20 40% of the total brand visibility.

Vehicles most strongly represented with 6 brands.

Battle of the Brands

Vehicles

Mercedes-Benz

2023

8% / 92%

Paid-Earned-Ratio

Channel	Rank
Total	1 / 28
Print News	1
Print Ads	4
Online News	1
TV Ads	14
YouTube Ads	11
OOH Ads	6
Search Ads	1
Radio Ads	13
Display Ads	7
Cinema Ads	1

TESLA

2023

0% / 100%

Paid-Earned-Ratio

Channel	Rank
Total	4 / 28
Print News	4
Print Ads	-
Online News	2
TV Ads	-
YouTube Ads	-
OOH Ads	-
Search Ads	27
Radio Ads	-
Display Ads	-
Cinema Ads	-

TOYOTA

2023

19% / 81%

Paid-Earned-Ratio

Channel	Rank
Total	10 / 28
Print News	11
Print Ads	13
Online News	11
TV Ads	5
YouTube Ads	10
OOH Ads	9
Search Ads	12
Radio Ads	10
Display Ads	3
Cinema Ads	4

Audi

2023

18% / 82%

Paid-Earned-Ratio

Channel	Rank
Total	6 / 28
Print News	7
Print Ads	2
Online News	6
TV Ads	2
YouTube Ads	3
OOH Ads	14
Search Ads	15
Radio Ads	1
Display Ads	4
Cinema Ads	14

Paid Media

Earned Media

Total Brand Visibility

Channel #/ #

Rank / number of brands

Battle of the Brands

Digital & Household

BRACK.CH

Total
5 / 30

- Print News 11
- Print Ads 5
- Online News 12
- TV Ads 5
- YouTube Ads 4
- OOH Ads 3
- Search Ads 2
- Radio Ads -
- Display Ads 7
- Cinema Ads 7

2023

77% / 23%

Paid-Earned-Ratio

GALAXUS

Total
2 / 30

- Print News 2
- Print Ads 13
- Online News 5
- TV Ads 1
- YouTube Ads 7
- OOH Ads 1
- Search Ads 1
- Radio Ads -
- Display Ads 5
- Cinema Ads 1

2023

63% / 37%

Paid-Earned-Ratio

Paid Media

Earned Media

Total Brand Visibility

Channel
#/ #

Rank /
number of brands

Battle of the Brands

Digital & Household

Electrolux

Total 14 / 30

- Print News 12
- Print Ads 12
- Online News 25
- TV Ads 8
- YouTube Ads 10
- OOH Ads 9
- Search Ads 11
- Radio Ads -
- Display Ads 8
- Cinema Ads -

2023

73% / 27%

Paid-Earned-Ratio

Miele

Total 12 / 30

- Print News 8
- Print Ads 4
- Online News 24
- TV Ads 10
- YouTube Ads 20
- OOH Ads 12
- Search Ads 14
- Radio Ads 5
- Display Ads 11
- Cinema Ads -

2023

63% / 37%

Paid-Earned-Ratio

V-ZUG

Total 23 / 30

- Print News 16
- Print Ads 19
- Online News 14
- TV Ads 18
- YouTube Ads 8
- OOH Ads 19
- Search Ads 16
- Radio Ads -
- Display Ads 15
- Cinema Ads -

2023

39% / 61%

Paid-Earned-Ratio

Paid Media

Earned Media

Total Brand Visibility

Channel #/ #

Rank /
number of brands

Battle of the Brands

Furnishing

XXXLutz

Total 3 / 13

Print News 10
Print Ads 6
Online News 5
TV Ads 3
YouTube Ads -
OOH Ads 7
Search Ads 6
Radio Ads 3
Display Ads 7
Cinema Ads -

2023

87% / 13%

Paid-Earned-Ratio

pfister

Total 2 / 13

Print News 9
Print Ads 9
Online News 4
TV Ads 2
YouTube Ads 1
OOH Ads 4
Search Ads 2
Radio Ads 2
Display Ads 1
Cinema Ads -

2023

93% / 7%

Paid-Earned-Ratio

IKEA

Total 1 / 13

Print News 1
Print Ads 8
Online News 1
TV Ads 1
YouTube Ads 2
OOH Ads 1
Search Ads 7
Radio Ads 1
Display Ads 6
Cinema Ads 1

2023

58% / 42%

Paid-Earned-Ratio

schubiger möbel

Total 13 / 13

Print News 13
Print Ads 12
Online News 13
TV Ads -
YouTube Ads -
OOH Ads 9
Search Ads 12
Radio Ads 6
Display Ads 13
Cinema Ads -

2023

92% / 8%

Paid-Earned-Ratio

Paid Media
Earned Media
Total Brand Visibility

Channel #/ # — **Rank /** number of brands

Battle of the Brands

Optics & Acoustics

NEUROTH – BESSER HÖREN • BESSER LEBEN

Channel	Rank
Total	5 / 5
Print News	4
Print Ads	1
Online News	3
TV Ads	5
YouTube Ads	2
OOH Ads	3
Search Ads	5
Radio Ads	2
Display Ads	1
Cinema Ads	-

2023

94% / 6%

Paid-Earned-Ratio

VISILAB

Channel	Rank
Total	2 / 5
Print News	3
Print Ads	5
Online News	5
TV Ads	3
YouTube Ads	3
OOH Ads	2
Search Ads	1
Radio Ads	-
Display Ads	2
Cinema Ads	-

2023

94% / 6%

Paid-Earned-Ratio

amplifon

Channel	Rank
Total	4 / 5
Print News	2
Print Ads	3
Online News	2
TV Ads	4
YouTube Ads	4
OOH Ads	4
Search Ads	4
Radio Ads	-
Display Ads	3
Cinema Ads	-

2023

81% / 19%

Paid-Earned-Ratio

McOptic

Channel	Rank
Total	3 / 5
Print News	5
Print Ads	2
Online News	4
TV Ads	2
YouTube Ads	5
OOH Ads	-
Search Ads	3
Radio Ads	-
Display Ads	-
Cinema Ads	-

2023

100% / 0%

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.
As of March 2024: There may be subsequent deliveries and calculations for the advertising pressure statistics data.

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)

OUT OF HOME
Analog and digital billboard advertising

TV
Public and private

RADIO
Analog and digital

INTERNET
Display crawlers, search and YouTube advertising

KINO

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

ONLINE NEWS
News portals
(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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