Paid

Switzerland Brand Trends

H1 2024

Earned

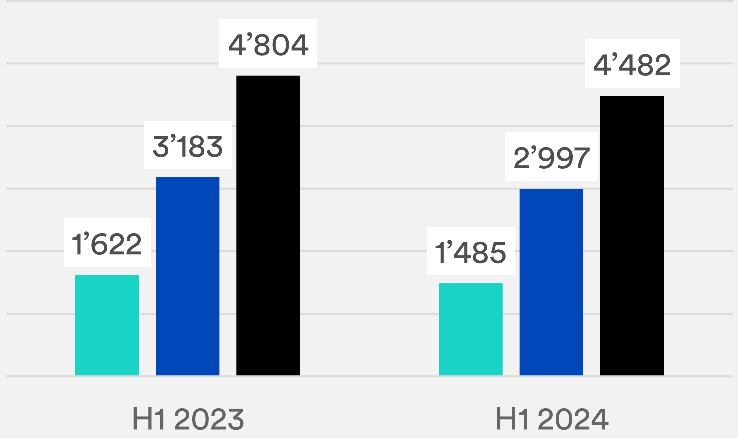
320 brands
22 sectors

Total Brand Visibility

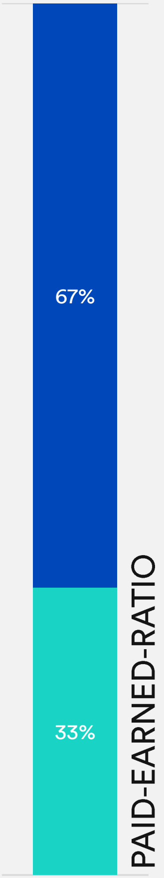
Switzerland Brand Trends H1 2024

320 brands

TBVi	Paid	Earned
4.5 billion CHF	1.5 billion CHF	3.0 billion CHF
Ø 14.0 million CHF	Ø 4.6 million CHF	Ø 9.4 million CHF
-6.7% +/- VJ%	-8.4% +/- VJ%	-5.8% +/- VJ%



In CHF millions



H1 2024

Total brand visibility 4.5 billion: ø 14.0 million per brand
The total brand visibility of the 320 recorded brands amounted to CHF 4.5 billion gross in the first half of 2024.

Ratio

Paid-earned ratio in favor of earned media
Earned media accounts for 67% of total visibility, which corresponds to CHF 3.0 billion. This contrasts with CHF 1.5 billion in gross advertising pressure (33%).

-6.7%

Reduction in visibility from H1 2023 to H1 2024
Overall visibility fell by -6.7% in the first half of 2024 compared to the first six months of 2023. There was a decline in both paid presence (-8.4%) and earned presence (-5.8%). This is mainly due to the UBS/CS merger in 2023 and its media discussion. In percentage terms, the highest increase in visibility was in the **Leisure, gastronomy, tourism** sector (+51%), followed by the **Optics & Acoustics** sector (+34%). In contrast, the **Wholesale distributors** sector recorded the highest decrease in visibility (-67%), followed by the **Tobacco** sector (-49%).

Total Industry Visibility

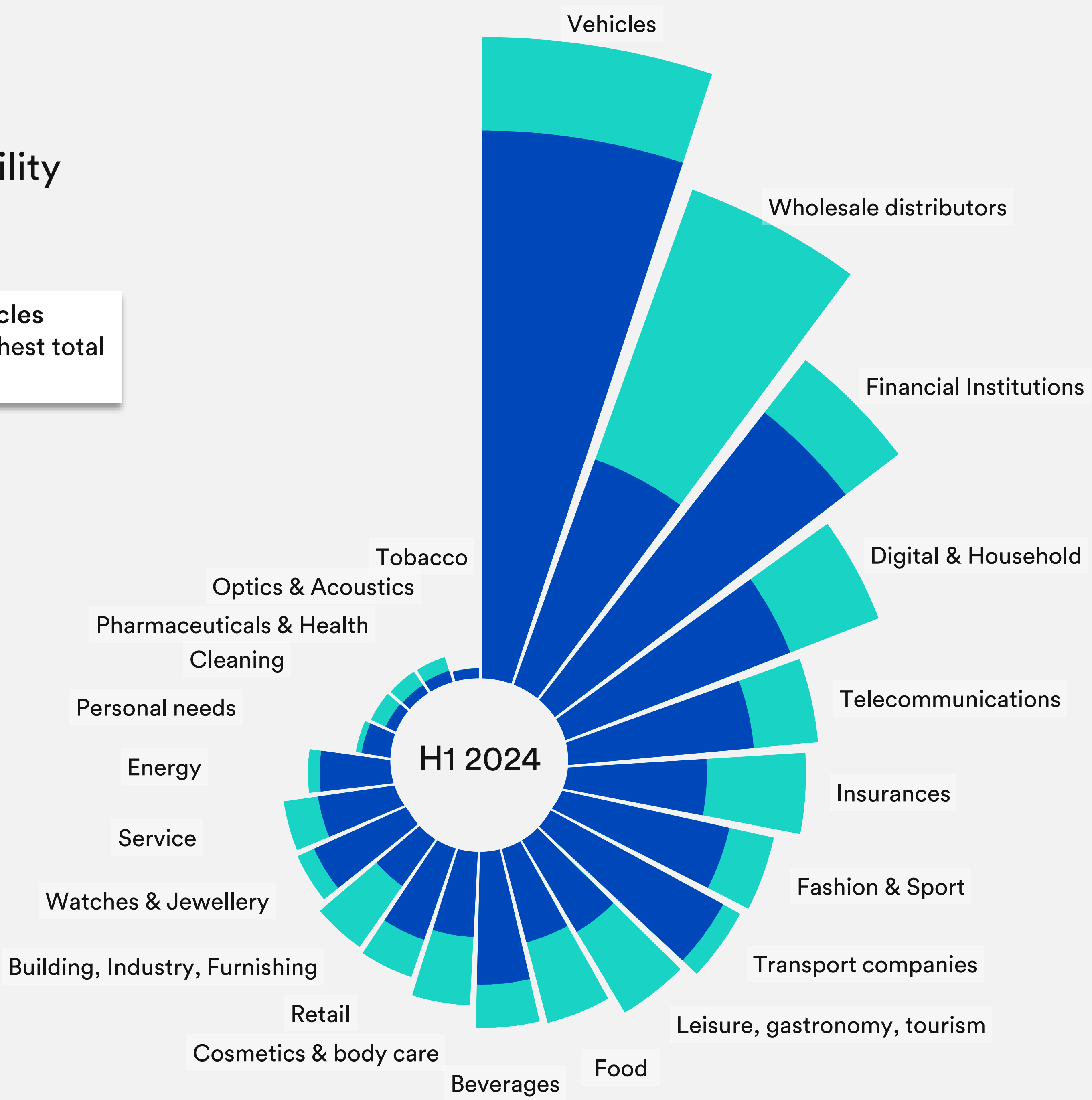
Paid Media + Earned Media = Total Brand Visibility
320 brands

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

Thanks to their advertising presence, the **Wholesale distributors** are in 2nd place in terms of overall visibility.

Financial Institutions rank 2nd in terms of earned media presence and 3rd overall.

Digital & Household is still in 4th place with a paid-earned ratio of 30% / 70%.

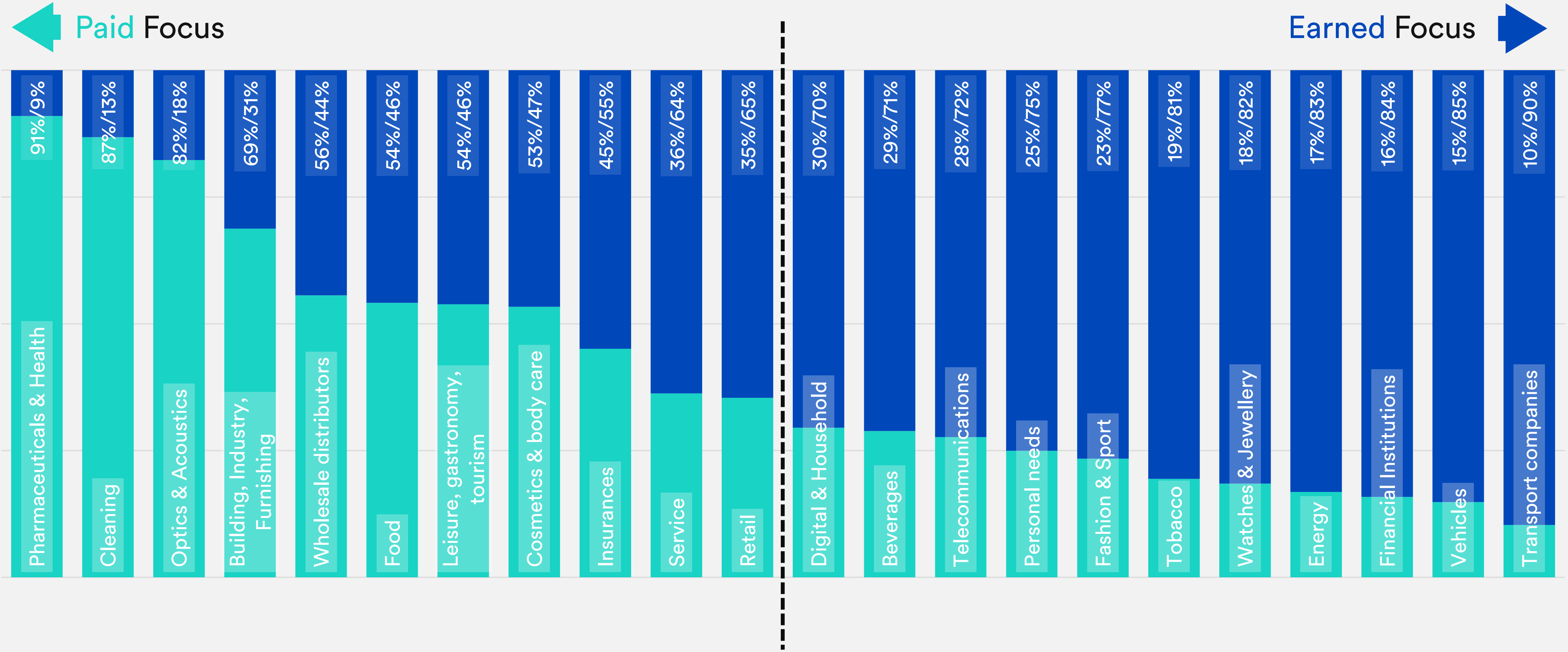


Paid-Earned-Ratio

Switzerland Brand Trends H1 2024

320 brands

Swiss Benchmark:
33% / 67%



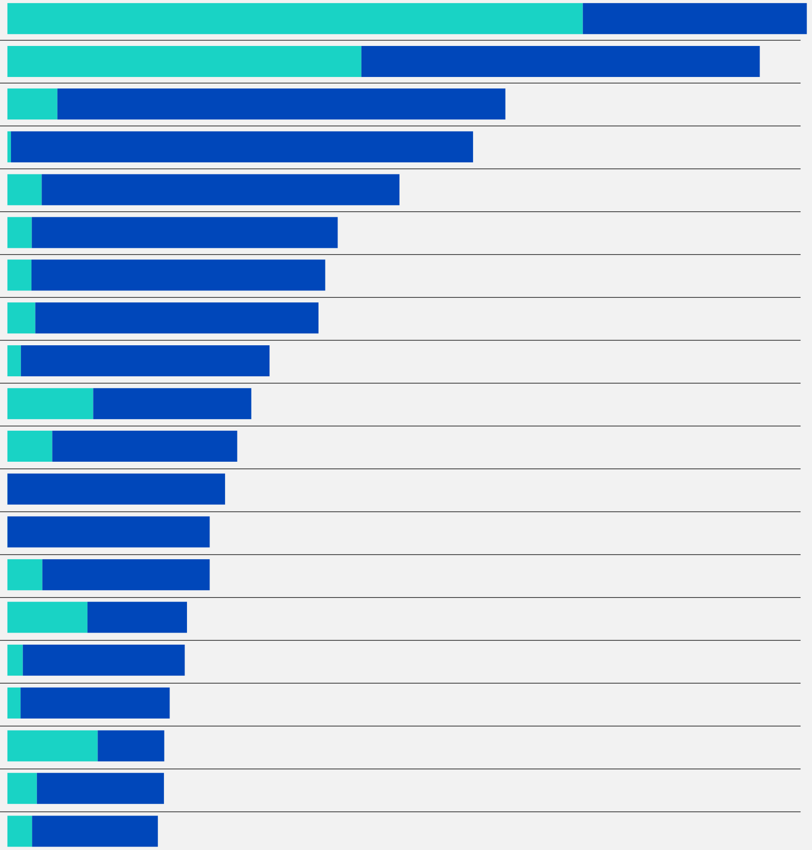
Total Brand Visibility

Switzerland Brand Trends H1 2024

320 brands

Ranking top 20 brands

TBVi	Brand	Paid	Earned	Paid-Earned-Ratio
1	Coop	1	9	72% / 28%
2	Migros	2	3	47% / 53%
3	UBS	21	2	10% / 90%
4	Google	221	1	1% / 99%
5	SBB	34	4	9% / 91%
6	Apple	57	5	7% / 93%
7	Mercedes	58	6	8% / 92%
8	Red Bull	46	7	9% / 91%
9	Credit Suisse	110	8	5% / 95%
10	Swisscom	4	15	35% / 65%
11	VW	25	12	20% / 80%
12	Ferrari	293	10	0% / 100%
13	Tesla	298	11	0% / 100%
14	Amazon	32	13	17% / 83%
15	Lidl	6	24	45% / 55%
16	BMW	93	14	9% / 91%
17	Cornèr Bank	115	16	8% / 92%
18	Mc Donald‘s	3	37	58% / 42%
19	Nestlé	43	17	19% / 81%
20	Audi	56	18	16% / 84%



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

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

The top 10 brands generate **28%**, the top 20 **39%** of total visibility.

Vehicles with 6 brands most strongly represented.

Battle of the Brands

Vehicles

Kanal	Ford	OPEL
Total	9 / 28	17 / 28
Print News	9	14
Print Ads	16	15
TV Ads	-	8
OOH Ads	3	13
Radio Ads	5	19
Cinema Ads	-	2
Display Ads	23	21
Search Ads	20	15
YouTube Ads	22	11
Online News	9	18

H1 2024

	Ford	OPEL
Paid-Earned-Ratio	14% / 86%	24% / 76%

- Paid Media
- Earned Media
- Total Brand Visibility

Kanal #/ # — Rank / number of brands

Battle of the Brands

Pharmaceuticals & Health

mepha

Total 4 / 6

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

H1 2024

41% / 59%

Paid-Earned-Ratio

VERFORA

Total 1 / 6

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

H1 2024

100% / 0%

Paid-Earned-Ratio

Paid Media

Earned Media

Total Brand Visibility

Kanal #/ #

Rank / number of brands

Battle of the Brands

Telecommunications

Salt.

Total 4 / 7

Print News 3

Print Ads 5

Online News 3

TV Ads 3

YouTube Ads 3

OOH Ads 3

Search Ads 3

Radio Ads 1

Display Ads 5

Cinema Ads 2

H1 2024

58% / 42%

Paid-Earned-Ratio

Sunrise

Total 3 / 7

Print News 4

Print Ads 4

Online News 4

TV Ads 2

YouTube Ads 2

OOH Ads 4

Search Ads 1

Radio Ads 5

Display Ads 3

Cinema Ads 1

H1 2024

78% / 22%

Paid-Earned-Ratio

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.
As of July 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

CINEMA

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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