BIS

BRAND INDICATOR SWITZERLAND

2024

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*To be investigated in more detail on a brand by brand basis in follow up research

1. BIS concept of study

Your indicator of future brand success

The Brand Indicator Switzerland (BIS) is the only Swiss study to measure the two brand factors that are decisive for actual success: **a) relevance ("How important is or will this brand be in your life?") and b) emotionality ("Please rate how much you like or dislike the following brand.").**

The Brand Indicator Switzerland **even reveals an outlook into the future by comparing the opinion of the population as a whole with the opinion of Influencial Opinion Leaders (IOLs).** Because IOLs are ahead of the curve - they influence their followers, who follow trends with a lag - their opinion can be an indicator to predict the future success or failure of brands.

The aim of the BIS is to provide CEOs and marketing and communication managers with a tool for making the right decisions. Concrete recommendations for action for the most important consumer brands in Switzerland can be derived from the results.

Questions

1. emotionality: "Please rate how much you like or dislike the following brand."
We use the term emotionality to describe a brand's ability to fulfill wishes, desires and dreams. Frequently good customer experiences create increasingly close emotional connections between brands and people. We illustrate this with the question "like" – which is less than "love", but more than "find likeable".

2. relevance: "How important is or will this brand be in your life?"
We use the term relevance to describe the influence of a brand on people's decision-making processes and behavior. The more relevant a brand is, the less interchangeable it is anchored in a person's psyche (quoted from Marcel Kranz). We illustrate this with the question of the degree of fulfillment of the brand promise.

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Survey details

Survey method
Online survey; representative of the population (language region, age, gender)

Target group
Internet-savvy resident population aged 16 to 65 years

Sample size
N = 2‘631 (GCH / FCH); ca. 320 most important brands

Statistical range of variation
A sample size of N = 2'631 yields a statistical range of ±5.54 % with a confidence interval of 95 %. For analyses based on sub-segments (e.g. men/women), the sample size used decreases and the statistical sample size used decreases and the statistical range of ariation increases.

Survey period
November 21 2023 – November 30, 2023

Study profile / Demographic distribution

	TOTAL	Subsample 1	Subsample 2	Subsample 3	Subsample 4	Subsample 5	Subsample 6	Subsample 7	Subsample 8
Total	**2’631**	**333**	**326**	**328**	**327**	**336**	**322**	**329**	**330**
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
German-Switzerland	1’921	243	239	237	238	245	234	242	243
	73.0%	73.0%	73.3%	72.3%	72.8%	72.9%	72.7%	73.6%	73.6%
French-speaking Switzerland	710	90	87	91	89	91	88	87	87
	27.0%	27.0%	26.7%	27.7%	27.2%	27.1%	27.3%	26.4%	26.4%
Males	1’306	167	161	164	162	167	161	164	160
	49.6%	50.2%	49.4%	50.0%	49.5%	49.7%	50.0%	49.8%	48.5%
Females	1’325	166	165	164	165	169	161	165	170
	50.4%	49.8%	50.6%	50.0%	50.5%	50.3%	50.0%	50.2%	51.5%
16 – 29 years	720	90	90	90	90	92	88	90	90
	27.4%	27.0%	27.6%	27.4%	27.5%	27.4%	27.3%	27.4%	27.3%
30 – 49 years	1’170	148	143	146	144	151	142	148	148
	44.5%	44.4%	43.9%	44.5%	44.0%	44.9%	44.1%	45.0%	44.8%
50 – 65 years	741	95	93	92	93	93	92	91	92
	28.2%	28.5%	28.5%	28.0%	28.4%	27.7%	28.6%	27.7%	27.9%

A sample size of 320 interviews per brand provides a statistical fluctuation margin of ±5.45% at a confidence interval of 95%. For analyses based on sub-segments (e.g. men/women), the sample size used decreases and the statistical fluctuation margin increases.

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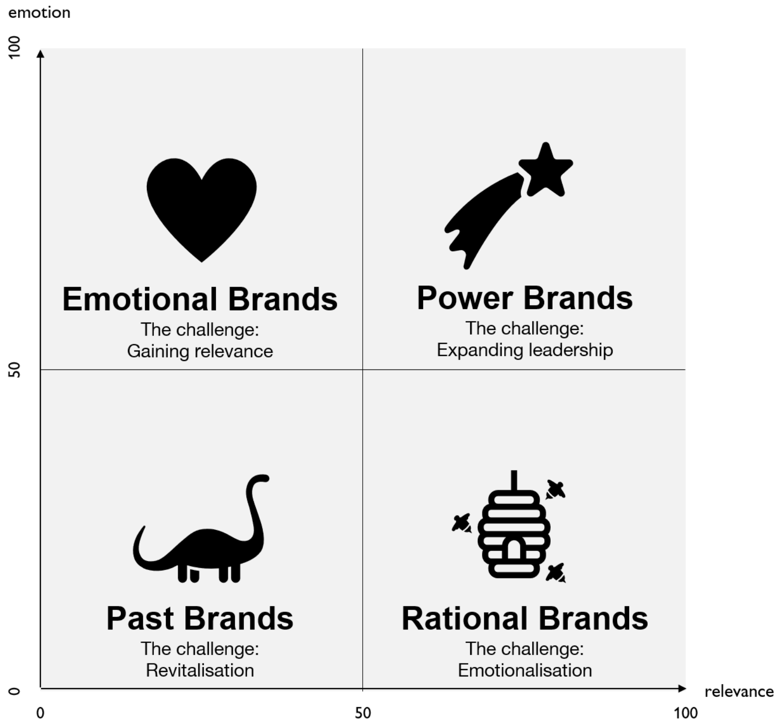
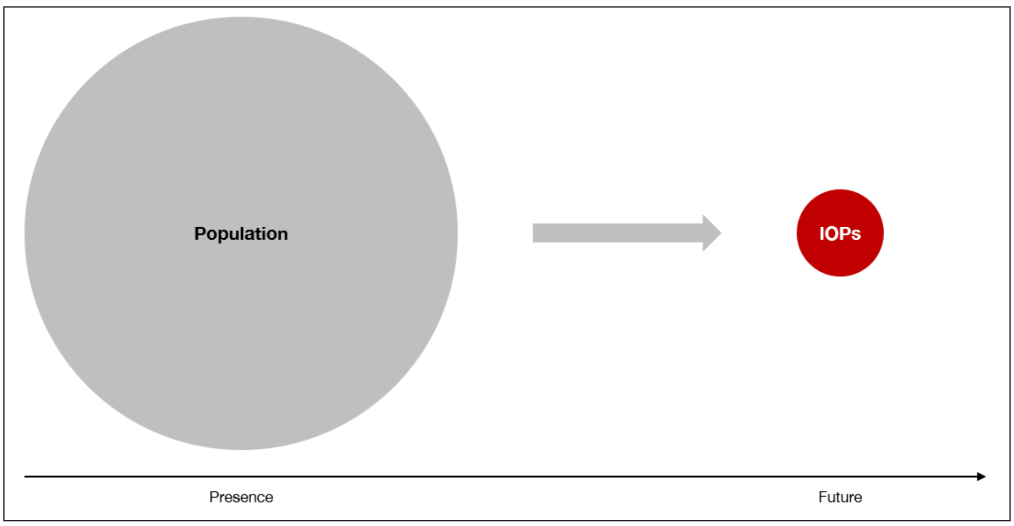
Deriving recommendations for action



Profil Influential Opinion Leader (IOL)

- Number of IOLs in the population:
- Determination of IOLs with the help of a question algorithm from the total population
- Characteristics of IOLs: Above-average reputation and followers, convey information and opinions, represent a target group, high credibility, high activity (appearances, likes, shares, subscribers, downloads, etc.)
- Youngest IOL: 16 years
- Oldest IOL: 62 years
- Arithmetic average: 32 years



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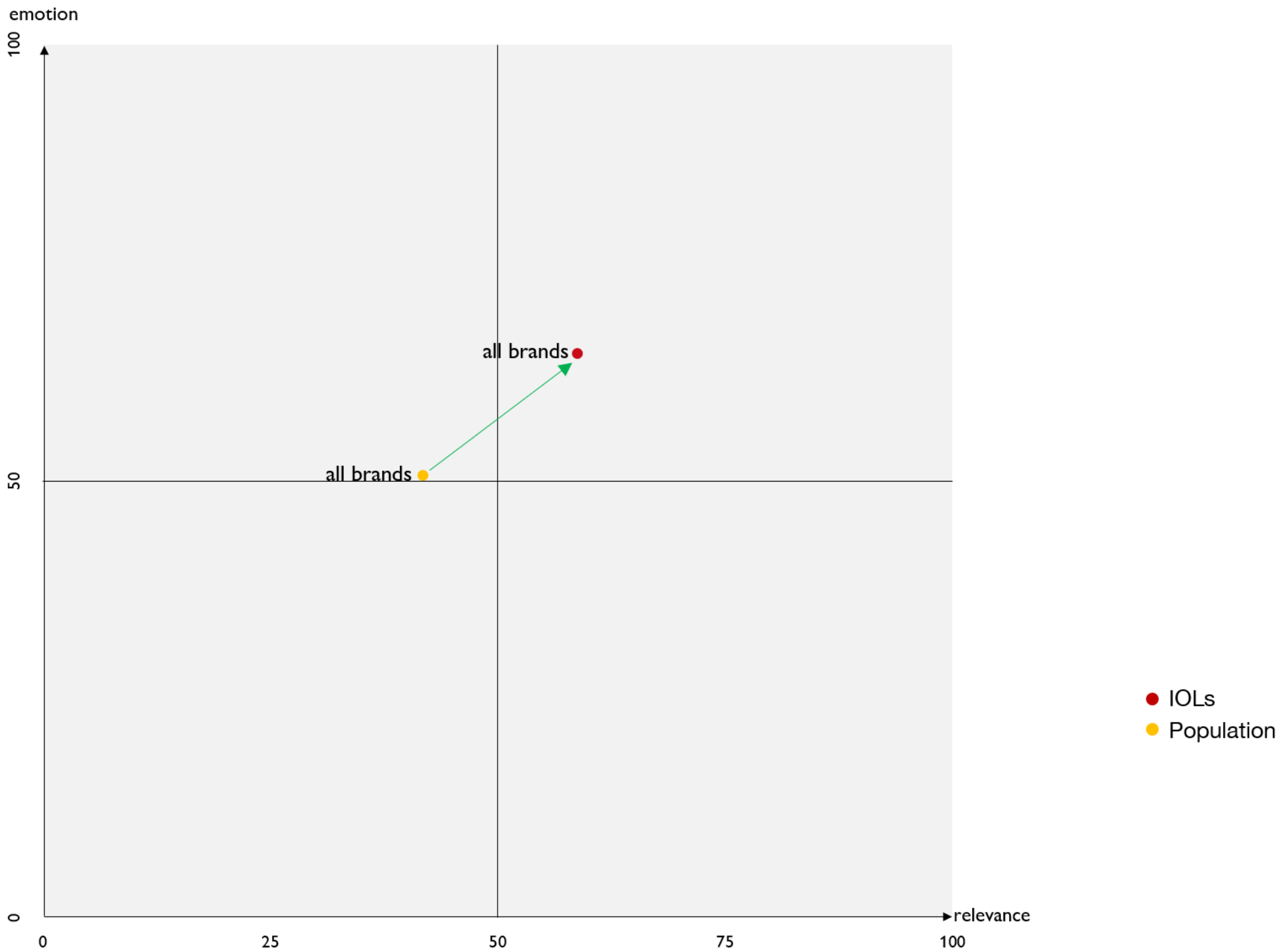
Average rating of all brands - Population & IOLs

It is in the nature of IOLs that they are more brand affine than the average of the overall population. If the deviation from the mainstream is significantly more positive than the average delta of around 15.5 points or even negative, this may be an indicator of future brand success or failure.



Δ Relevance: 17.0 Points
Δ Emotion: 14.0 Points

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2. BIS 2024 Rankings: The top brands

The top 10 brands of the Swiss population in 2024

1	Migros	78.8
2	WhatsApp	77.9
3	Google	75.0
4	coop.ch	72.4
5	Twint	72.2
6	Aus der Region, für die Region	71.5
7	Coop	71.1
8	Le Gruyère	71.0
9	Lindt	70.6
10	Coop Supercard	70.5

Ranking based on the "Emotionality" and "Relevance" dimensions
Basis: Population

The top 100 brands of the Swiss population

1 Migros	78.8	31 Schweizer Fleisch	64.3	61 Raiffeisen	60.4	91 Betty Bossi	57.9
2 WhatsApp	77.9	32 Naturaplan	64.2	62 Fernsehen SRF	60.4	92 Apple	57.8
3 Google	75.0	33 Ovomaltine	64.2	63 Heinz	60.4	93 Canon	57.3
4 coop.ch	72.4	34 IKEA	64.0	64 Jumbo	60.3	94 Swatch	57.3
5 Twint	72.2	35 Migros Bio	63.7	65 Lidl	60.3	95 Coop Zeitung	57.0
6 Aus der Region, für die Reg. **(new)**	71.5	36 VISA	63.4	66 Schweiz Toursimus	60.2	96 booking.com	57.0
7 Coop	71.1	37 SwissMilk	63.4	67 Samsung	60.0	97 Maggi	56.9
8 Le Gruyère	71.0	38 Lego	63.3	68 Victorinox	60.0	98 Stadt Luzern **(new)**	56.9
9 Lindt	70.6	39 Kägi	63.1	69 Spotify	59.9	99 die Mobiliar	56.8
10 Coop Supercard	70.5	40 Swiss	63.0	70 Landi	59.8	100 migros.ch **(new)**	56.8
11 Die Post	69.8	41 Tempo	62.7	71 Post Finance	59.8		
12 Wikipedia **(neu)**	69.2	42 Coop Pronto **(new)**	62.6	72 Emmentaler (Käse)	59.7		
13 Migros Cumulus	69.1	43 Ragusa	62.6	73 Nike	59.5		
14 M-Budget	68.8	44 Toblerone	62.5	74 Aldi Suisse	59.4		
15 YouTube	68.6	45 Kambly	62.5	75 Dosenbach	59.1		
16 PayPal	68.4	46 Swisscom	62.4	76 Sony	58.9		
17 Zweifel	68.4	47 galaxus.ch	62.4	77 Electrolux	58.9		
18 SBB	67.7	48 Bio Suisse	62.3	78 Migros DO IT+GARDEN	58.9		
19 Swiss made	67.4	49 Nivea	62.0	79 Schweizer Käse **(new)**	58.8		
20 Mastercard	66.2	50 M-Electronics	61.6	80 Wernli	58.8		
21 Barilla	66.0	51 Coop City	61.6	81 Netflix	58.8		
22 Coop Qualité & Prix	66.0	52 Appenzeller (Käse)	61.4	82 Manor	58.8		
23 Thomy	65.7	53 Chocolat Frey	61.4	83 Miele	58.5		
24 Emmi	65.2	54 digitec.ch	61.3	84 Adidas	58.5		
25 Denner	65.1	55 Samsung Galaxy	61.3	85 Kantonalbank	58.5		
26 IP Suisse	64.8	56 Max Havelaar	61.1	86 Rivella	58.4		
27 Cailler	64.6	57 Interdiscount	61.1	87 Ramseier	58.3		
28 Ricola	64.5	58 Maestro	61.0	88 20 Minuten	58.3		
29 Microsoft	64.4	59 Fairtrade	60.7	89 Miini Region **(new)**	58.1		
30 Prix Garantie	64.4	60 TCS	60.7	90 Philips	58.0		

Ranking based on the "Emotionality" and "Relevance" dimensions
Basis: Population

*To be investigated in more detail on a brand by brand basis in follow up research

Migros is once again the No. 1 brand in Switzerland, ahead of WhatsApp and Google; coop.ch makes a big leap to fourth place, making it the No. 1 online supermarket in Switzerland

The ranking of the top brands consists of the aggregate of the two factors popularity and relevance. **Migros** is the big winner in the latest BIS survey: last year, **Migros** was in second place behind **WhatsApp;** but above all, numerous indicators were worse than those of its competitor **Coop,** e.g. **Coop** was ahead in French-speaking Switzerland, as well as in the young segment. The old order has now been restored:The **Migros** brand was able to make gains, particularly in the critical parameters, and is once again the No. 1 brand among the Swiss population. The reasons for this are likely to include greater price sensitivity (**Migros** is now once again the No. 1 brand in French-speaking Switzerland, which is more price-sensitive than German-speaking Switzerland and in the young age segment) and communication that strikes a chord with the general population.

Online, however, **Coop** is ahead by a wide margin – the continuous investments in the online supermarket **coop.ch** are well received by the public: **coop.ch** once again makes a remarkable leap to 4th place (2023: Rank 18; 2022: Rank 118 (then still coop@home) and is even ahead of its own umbrella brand; the values of **coop.ch** and the **Coop** umbrella brand have only a marginal gap, which is in line with the rule that digital sub-brands ideally achieve congruent values with the traditional brand. More importantly for **Coop**: online, **Coop** has left its competitor **Migros** far behind - migros.ch only just made it to 100th place, which shows that **Migros'** new online supermarket is still a long way from the desired digital shopping experience.

Twint makes the leap to fifth place and is by far the most popular payment method; "From the region, for the region" as well as Lindt and Coop Supercard are new in the top 10

Twint is the most popular payment method in Switzerland (5th place) and was able to move up another three places, while **Mastercard** fell from 7th place in the previous year to place 20, falling behind **Paypal** in 16th place, which made a big leap forward from 122nd place. Lindt jumped to 9th place (previous year 17th place). The **Migros** sub-brand **"Aus der Region, für die Region"** was surveyed for the first time and made it to 6th place straight away. The **Coop Supercard** sub-brand also made a big leap: from 22nd place to 10th place.

Newly surveyed brands that have made it directly into the top 100 brands of the Swiss population

Regional products are on trend: the **Migros** sub-brand **"Aus der Region, für die Region"** is new and immediately makes it into the top 10 in 6th place; competitor **Coop** loses out here with **"Mini Region"** (89th place, also surveyed for the first time). On the other hand, the **Coop Pronto** sub-brand climbed to 42nd place. **Wikipedia** is also highly relevant and popular: **Wikipedia** comes in at number 12 straight away.

Other new entries in the top 100 include the **Schweizer Käse** label (79th place), the **city of Lucerne** in 98th place (the larger cities were also included in the brand ranking for the first time) and **migros.ch** in 100th place, although the gap to **coop.ch** in 4th place is enormous (**coop.ch** is one year ahead).

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The biggest climbers in the top 100 brands: PayPal, Raiffeisen, Samsung Galaxy, coop.ch, Swiss Milk, Coop Supercard, Maggi, Nike, Lindt, Swiss Meat, digitec.ch, canon, Kägi, Swiss

We cannot emphasize enough that a brand study cannot be about rankings, but primarily about the development of brands over time, especially in relation to their direct competitors. More important than the rankings are therefore the changes in value, which we have therefore also taken as the basis for the climbers/decliners; because the values of some brands are very close to each other, small changes in value can lead to major shifts in rank. It is in the nature of leading, strong brands that their values change only marginally over the years. change marginally over the years.

- PayPal (from rank 122 to 16)
- Schweizer Fleisch (from rank 53 to 31)
- Raiffeisen (from rank 114 to 61)
- digitec.ch (from rank 81 to 54)
- Samsung Galaxy (from rank 103 to 55)
- Canon (from rank 116 to 93)
- coop.ch (from rank 18 to 4)
- Kägi (from rank 60 to 39)
- Swiss Milk (from rank 80 to 37)
- Swiss (from rank 65 to 40)
- Coop Supercard (from rank 22 to 10).
- Maggi (from rank 133 to 97)
- Nike (from rank 108 to 73)
- Lindt (from rank 17 to 9)

Comments on the biggest climbers (profit aggregated value) in the top 100 brands of the Swiss population

PayPal achieves the biggest change in aggregated relevance and popularity scores, making a huge leap from 122nd to 16th place; **PayPal** is ahead of **Mastercard**, which is one of the bigger decliners (from 7th to 20th place); together with **Twint**, this result underlines the fact that digital payment methods have overtaken highly rated credit cards. Payment methods have overtaken the highly rated credit cards.

Raiffeisen is back after the turmoil and has made a big leap from 114th to 61st place, making it the best-rated bank in the top 100 brands, ahead of **Post Finance** (71st place) and the cantonal banks (78th place).

Samsung Galaxy also makes a huge leap from rank 103 to 55, while the umbrella brand **Samsung** is one of the losers and falls from rank 35 to 67; **Samsung Galaxy** thus overtakes the **iPhone** for the first time at rank 103.

coop.ch makes another remarkable leap to 4th place (2023: Rank 18; 2022: Rank 118 (then still coop@home) and is even ahead of its own umbrella brand; the values of **coop.ch** and the **Coop** umbrella brand are only marginally apart, which is in line with the rule that digital sub-brands ideally achieve congruent values with the traditional brand. More importantly for **Coop:** online, **Coop** has left its competitor **Migros** far behind – **migros.ch** only just made it to 100th place, which shows that **Migros'** new online supermarket is still a long way from the desired digital shopping experience.

In recent years, the trend towards new eating habits has meant that both **Swiss milk** and **Schweizer Fleisch** have lost a lot of ground. Interestingly, a clear trend reversal can be observed here: **Swiss Milk** jumps from rank 80 to 37 and the **Schweizer Fleisch** label from rank 53 to 31. **Maggi** is also bucking the trend, jumping from rank 133 to 97. What is also striking in this year's ranking is that traditional Swiss chocolate products are rated better almost across the board, with **Lindt** leading the way from rank 17 to 9 and **Kägi** from rank 60 to 39. With one exception, by the way: **Toblerone** (see relegated).

Nike made a sporty leap from 108th to 73rd place and is clearly ahead of its main competitor **Adidas** in 84th place. **digitec.ch** (from 81st to 54th place) and **Canon** (from 116th to 93rd place) as well as **Swiss** (from 65th to 40th place) also achieved above-average scores this year, which is certainly also due to the greater desire to travel after the Corona years.

The biggest decliners in the top 100 brands: Coop City, YouTube, Mastercard, Toblerone, Aldi Suisse, Samsung, Radio SRF, Netflix, Landi, Terra Suisse, Dar-Vida, Denner, Fernsehen SRF, Rivella, 20 Minuten

We cannot emphasize enough that a brand study cannot be about rankings, but primarily about the development of brands over time, especially in relation to their direct competitors. More important than the rankings are therefore the changes in value, which we have therefore also used as the basis for the climbers/decliners. Because the values of some brands are very close to each other, small changes in value can lead to major shifts in rank. It is in the nature of leading, strong brands that their values only change marginally over the years.

- Coop City (from rank 30 to 51)
- Terra Suisse (from rank 74 to 111)
- YouTube (from rank 5 to 15)
- Wernli (from rank 49 to 80)
- Mastercard (from rank 7 to 20)
- Dar-Vida (from rank 83 to 112)
- Toblerone (from rank 20 to 44)
- Denner (from rank 14 to 25)
- Aldi Suisse (from rank 40 to 74)
- Fernsehen SRF (from rank 42 to 62)
- Samsung (from rank 35 to 67)
- Rivella (from rank 56 to 86)
- Radio SRF (from rank 69 to 106)
- 20 Minuten (from rank 58 to 88)
- Netflix (from rank 46 to 81)
- Landi (from rank 41 to 70)

Comments on the biggest decliners (loss aggregated value) in the top 100 brands of the Swiss population

The fact that department stores generally have a harder time is shown by **Coop City**, which falls from 30th to 51st place. Interestingly, **YouTube** has dropped out of the top 10, from 5th to 15th place. The fragmentation of media - there are more and more media offerings, but there are still only 24 hours in a day - has now also affected **YouTube**. Even **Netflix's** highs are over: the streaming service has fallen from 46th to 81st place. The negative media trend is also visible in the two strongest Swiss media brands: **SRF radio** has fallen from 69th to 106th place, **SRF television** from 42nd to 62nd place and **20 Minuten** from 58th to 88th place. Incidentally, not a single brand of the much-discussed social media brands such as **Instagram, Facebook, TikTok** etc. is in the top 100 brands of the Swiss population. The fact that traditional credit card brands have a hard time against digital payment methods is shown by **Mastercard,** which fell from 7th to 20th place and was overtaken by **Twint** in 4th place and **PayPal** in 16th place.

While traditional Swiss chocolate brands achieved higher values across the board this year, one loser stands out in particular: **Toblerone.** The negative headlines - production abroad, rebranding without the Matterhorn, an unfortunate campaign, etc. - mean that the Swiss population apparently no longer like the taste of the brand.

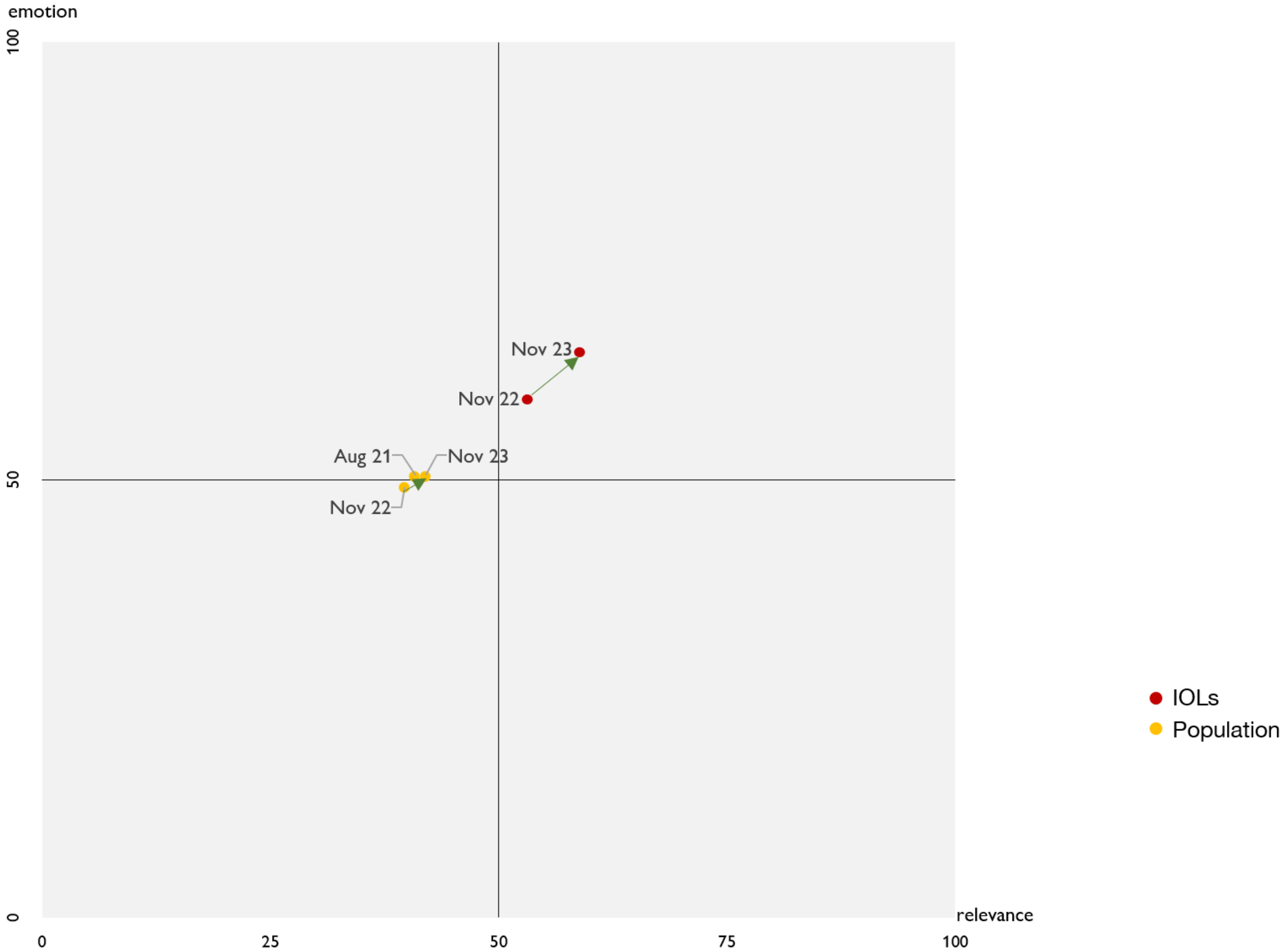
Landi (from 41st to 70th place), **Terra Suisse** (from 74th to 111th place), **Dar-Vida** (from 83rd to 112th place), **Denner** (from 14th to 25th place) and **Rivella** (from 56th to 86th place) also recorded losses in value.

*To be investigated in more detail on a brand by brand basis in follow up research

Orientation and home are becoming more important for people and brands, especially traditional brands, are becoming correspondingly more important again

It is interesting to compare the average brand rating over the last few years: while it has steadily declined slightly, it is significantly higher in the current rating; this is particularly evident in the ratings of the top 100 brands. In an increasingly fast-paced and confusing world, the desire for orientation is growing. While some traditional brands have lost a great deal of value in recent years, a clear trend reversal can be seen, particularly among these brands.

Brand affinity in general



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The top brands among 16-29-year-olds

1	Spotify	76.9
2	Google	76.8
3	YouTube	76.5
4	Die Post	75.7
5	WhatsApp	75.4
6	Migros	75.0
7	Wikipedia	73.1
8	Instagram	72.8
9	coop.ch	72.7
10	Zalando	71.5
11	Twint	71.0
12	Microsoft	69.9
13	SBB	69.8
14	Nike	69.6
15	iPhone	69.4
16	Apple	69.3
17	Aus der Region, für die Reg. 6 **new**	68.8
18	PayPal	68.6
19	Lidl	68.5
20	Swiss	68.4
21	Coop	68.2
22	Netflix	68.2
23	IKEA	68.0
24	Mastercard	67.5
25	Adidas	67.2
26	Zweifel	67.0
27	Lindt	66.8
28	Coop Pronto	66.8
29	Coop Supercard	66.7
30	Ovomaltine	65.8
31	Prix Garantie	65.7
32	Swisscom	65.1
33	VISA	65.1
34	Raiffeisen	65.0
35	Denner	64.9
36	M-Budget	64.8
37	Barilla	64.6
38	Fernsehen SRF	64.2
39	H&M	64.1
40	Lego	63.7
41	TCS	63.7
42	Maestro	63.6
43	Audi	63.6
44	Nivea	63.4
45	Migros Cumulus	63.2
46	Le Gruyère	63.2
47	Coop Qualité & Prix	63.0
48	galaxus.ch	62.8
49	Heinz	62.6
50	EasyJet	62.6
51	Aldi Suisse	62.2
52	Cailler	62.1
53	Coop City	62.1
54	migros.ch **new**	62.0
55	Swiss Made	61.8
56	Migros Bio	61.7
57	digitec.ch	61.7
58	Snapchat	61.6
59	SwissMilk	61.5
60	Post Finance	61.5
61	Amazon	61.3
62	20 Minuten	61.2
63	Mercedes	61.2
64	Migrolino	61.0
65	Volkswagen	61.0
66	Rivella	60.8
67	Kantonalbank	60.8
68	Disney+	60.7
69	Landi	60.6
70	Coca-Cola	60.5
71	Interdiscount	60.3
72	McDonalds	60.1
73	Tempo	60.0
74	Schweizer Fleisch	59.8
75	M-Electronics	59.8
76	Ochsner Sport	59.6
77	BMW	59.6
78	Emmi	59.4
79	M6	59.4
80	Radio SRF	59.3
81	AirBnB	59.3
82	Max Havelaar	58.9
83	Fairtrade	58.8
84	Toblerone	58.8
85	Swiss Life	58.4
86	UBS	58.4
87	TF 1 (France 1)	58.2
88	Zara	58.2
89	Kambly	58.0
90	Nespresso	58.0
91	Thomy	57.9
92	DHL	57.9
93	booking.com	57.9
94	Capri Sun	57.9
95	Naturaplan	57.8
96	Sony	57.8
97	Swatch	57.8
98	Levi's	57.8
99	Nestlé	57.8
100	24heures	57.8

Ranking based on the "Emotionality" and "Relevance" dimensions
Basis: Population aged 16 - 29 years

The biggest climbers in the top 100 boys' brands (comparison aggregated value to previous year)

Snapchat	+18.5	from rank 206 to 58
Easy Jet	+14.2	from rank 153 to 50
Raiffeisen	+13.4	from rank 125 to 34
24heures	+13.5	from rank 190 to 100*
Volkswagen	+13.3	from rank 162 to 65
SwissMilk	+13.1	from rank 152 to 59
UBS	+12.6	from rank 176 to 86
Swisscom	+12.5	from rank 122 to 32
Zara	+11.0	from rank 168 to 88
Paypal	+10.1	from rank 137 to 18
McDonalds	+10.0	from rank 139 to 72

**To be considered relative, as many "don't know" (= low level of awareness)*

*To be investigated in more detail on a brand by brand basis in follow up research

The biggest decliners in the top 100 boys' brands (comparison aggregated value to previous year)

Netflix	-10.2	from rank 4 to 22
iPhone	-9.1	from rank 3 to 15
Coop	-8.3	from rank 6 to 21
WhatsApp	-6.8	from rank 2 to 5
Google	-6.4	from rank 1 to 2
Ikea	-6.1	from rank 10 to 23
Mastercard	-5.9	from rank 11 to 24
Toblerone	-4.1	from rank 33 to 84

Commentary on the biggest risers and fallers in the top 100 boys' brands (comparison of aggregated value with previous year)

At +18.5, **Snapchat** achieved the most significant jump in aggregated value in the young segment compared to the previous year. The fact that social media is significantly more important for young people than for the rest of the population is also evident here. On the other hand, it is noticeable that leading digital top brands such as **Netflix, iPhone, WhatsApp** and **Google** have suffered a drop in value. One explanation for this could be the fractalization of their markets, which is putting them under pressure, at a very high level. The fact that digital payments are overtaking conventional credit cards is also evident here: While **Paypal** makes significant gains with +10.1 and **Twint** leads this field in 11th place, **Mastercard** loses significantly with -5.9 among the young. It is worth noting that Swiss bank brands such as **Raiffeisen** (+13.4) and **UBS** (+12.6) were able to make significant gains among young people.

This also applies to traditional brands such as **Swisscom** (+12.5) and **Swiss Milk** (+13.1). The latter had been steadily losing ground in recent years due to the propagation of new eating habits - a clear counter-trend can be seen here, incidentally also among the population as a whole. In general, the leading German car brands are on the rise, led by **Volkswagen** with +13.3. Incidentally, **Tesla** is far behind among young people with a value of 43.9 in 195th place - an indication that the future momentum among car brands belongs to the established brands.

Coop made gains among young people last year, but is now one of the clear losers at -8.3, while **Migros** remains virtually unchanged at +0.3, but has been able to strengthen its leading position against its main competitor. One explanation is probably the greater price awareness of young people in view of the tense economic situation. This is also reflected in the value gains of "price-sensitive" brands such as **Easy Jet** (+14.2), **Zara** (+11.0) and **McDonalds** (+10.0). Other losers among the young include **Toblerone,** which fell from 33rd to 84th place.

*To be investigated in more detail on a brand by brand basis in follow up research

What sets young people apart from their elders: they are more digital, mobile, sporty and fashion-conscious

Spotify at rank 1 (population rank 69) is emblematic of the digital generation gap. **Instagram** rank 8 (population rank 179), **Microsoft** rank 12 (population rank 29), **iPhone** rank 15 (population rank 103), **Apple** rank 16 (population rank 92), **Amazon** rank 61 (population rank 180), **Disney+** rank 68 (population rank 152), **Netflix** rank 22 (population rank 81), **Snapchat** rank 58 (population rank 351), **AirBnB** rank 81 (population rank 188).

The differences to the rest of the population also show how important mobility is for young people: **SBB** rank 13 (population rank 18), **Swiss** rank 20 (population rank 40), **TCS** rank 41 (population rank 60), **Audi** rank 43 (population rank +54), **Volkswagen** rank 65 (population rank 137), **BMW** rank 77 (population 192).

Significant differences can also be seen with brands in the sports and fashion sector: **Zalando** ranked 10th (population ranked 115th), **Nike** ranked 14th (population ranked 73rd), **Adidas** ranked 25th (population ranked 84th), **H&M** ranked 39th (population ranked 110th), **Ochsner Sport** ranked 76th (population ranked 109th), **Zara** ranked 88th (population ranked 242nd).

What else stands out is that the postal service is now ranked 4th among young people (population ranked 11th) - after all, the parcels ordered from **Zalando** & Co. have to arrive. The idea that television is outdated among young people is clearly refuted - content is no longer only consumed via stationary television. Compared to the previous year, the **SRF television** brand even made slight gains among young people (+3.4) and came in 38th place (population rank 62).

The brands that perform significantly worse in the ranking among young people than among the rest of the population include **Coop** in 21st place (population rank 7), **M-Budget** in 36th place (population rank 14), **Migros Cumulus** in 45th place (population rank 13), **Le Gruyère** in 46th place (population rank 8), **Coop Qualité & Prix** in 47th place (population rank 22), **Cailler** in 52nd place (population rank 27), the **Swiss Made** quality label ranked 55th (population ranked 19th), **Tempo** ranked 73rd (population ranked 41st), **Schweizer Fleisch** ranked 74th (population ranked 31st), **M-Electronics** ranked 75th (population ranked 50th), **Emmi** ranked 78th (population ranked 24th), **Max Havelaar** ranked 82nd (population ranked 56th), **Toblerone** ranked 84th (population ranked 44th), **Kambly** ranked 89th (population ranked 45th), **Thomy** ranked 91st (population ranked 23rd), **Naturaplan** ranked 92nd (population ranked 32nd).

*To be investigated in more detail on a brand by brand basis in follow up research

The top brands of the future

The brands with the greatest growth potential – basics

The Brand Indicator Switzerland also provides an **outlook into the future by comparing the opinion of the population as a whole with the opinion of Influencial Opinion Leaders (IOLs).** Because IOLs are ahead of the curve - they influence their followers, who follow trends with a delay - their opinion is an indicator to predict the future momentum of brands and thus their future success or failure. predict their future success or failure. **The bigger the difference between the mainstream and the IOLs, the greater the chance of above-average growth for the brand in question. As IOLs are by definition more brand-affine than the average (around 15.5 points on our value scale), positive momentum must be significantly higher (around +27 and above) or significantly lower (+4 and below). It goes without saying that the strongest brands such as Migros, Coop, Google etc. have a lower momentum or growth potential. However, the IOLs are a good indicator of the brands with the greatest potential for growth.**

The 100 top brands of the future

X	+45.3	Swiss Life	+29.3
* Canal+	+41.7	BMW	+28.9
Bitcoin	+37.8	Instagram	+28.1
Fifa	+36.9	Porsche	+28.0
TikTok	+36.3	Red Bull	+27.8
Snap Chat	+35.3	Apple Pay	+27.7
AliExpress	+33.5	Mini	+27.7
Apple TV	+33.3	Audi	+27.5

Based on the "emotionality" & "relevance" dimension
Basis: IOLs vs. population (mainstram) of the 100 top IOL top brands (min. value 67.1): min. Δ +26.9

**To be viewed in relative terms, as many "don't know" (= too low level of awareness)*

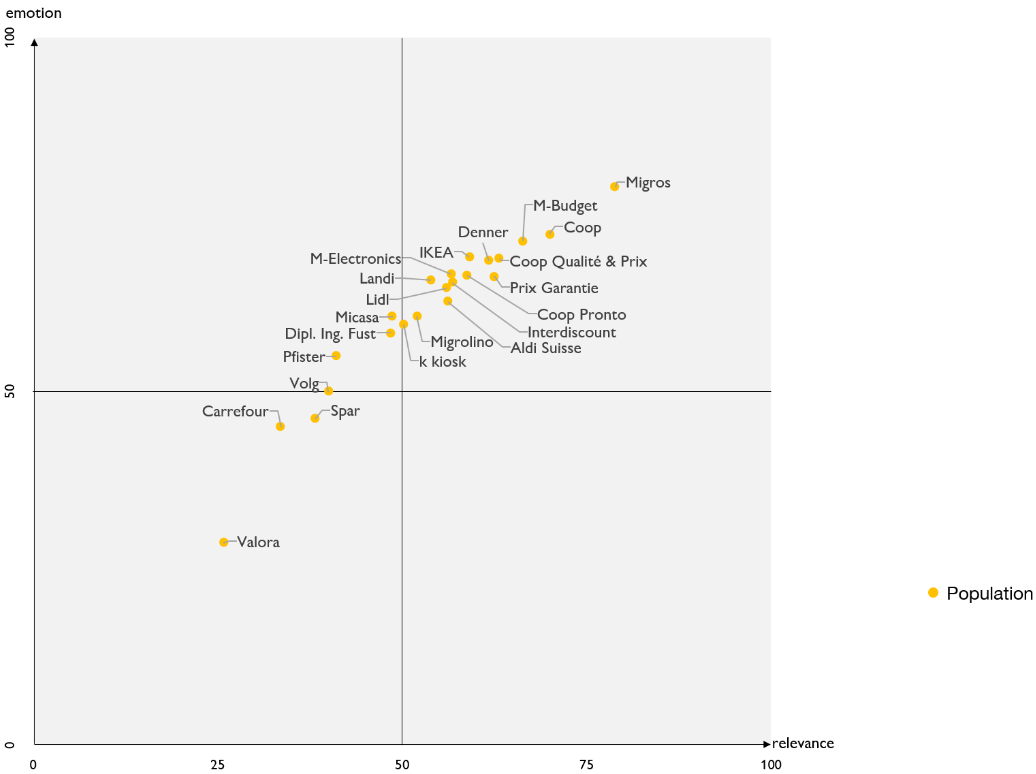
Commentary on the brands with the greatest growth potential

These figures clearly show that IOLs not only have an affinity for brands, but also recognize and help shape trends before anyone else: it is certainly debatable whether **X** and **Bitcoin** will perform so positively in the future. And of course there are also numerous brands that tend to appeal to a younger audience, such as **TikTok, AliExpress** or **Red Bull.** In addition, IOLs usually have higher incomes than the average, which shows an affinity for expensive brands such as **Tesla, BMW, Porsche,** etc. However, it must be emphasized that the age range of IOLs ranges from 16 (youngest) to 62 (oldest) and the average age is 32. Furthermore, it should not be forgotten that IOLs make up around a fifth of the total population in this survey, which is an impressive proportion.

*To be investigated in more detail on a brand by brand basis in follow up research

3. BIS 2024: Insight into some sectors (extract)

Retail – Power Brands Population 2024



			Previous year
1	Migros	78.8	79.2
2	Coop	71.1	72.2
3	M-Budget	68.8	
4	Coop Qualité & Prix	66.0	
5	Denner	65.1	
6	Prix Garantie	64.4	
7	IKEA	64.0	
8	Coop Pronto	62.6	
9	M-Electronics	61.6	
10	Interdiscount	61.1	
11	Lidl	60.3	
12	Landi	59.8	
13	Aldi Suisse	59.4	
14	Migrolino	56.4	
15	k kiosk	54.8	
16	Micasa	54.7	
17	Dipl. Ing. Fust	53.4	
18	Pfister	48.0	
19	Volg	45.0	
20	Spar	42.2	
21	Carrefour	39.3	
22	Valora	27.2	

Ranking based on the "Emotionality" & "Relevance" dimension
Basis: Population

*To be investigated in more detail on a brand by brand basis in follow up research

Retail – Power Brands 16 - 29 years old 2024

Previous year 74.7	Previous year 61.8	Previous year 76.5	Previous year 74.0
1 — 75.0 Migros	2 — 68.5 Lidl	3 — 68.2 Coop	4 — 68.0 IKEA
5 — 66.8 Coop Pronto	6 — 65.7 Prix Garantie	7 — 64.9 Denner	8 — 64.8 M-Budget
9 — 63.0 Coop Qualité & Prix	10 — 62.2 Aldi Suisse	11 — 61.0 Migrolino	12 — 60.6 Landi
13 — 60.3 Interdiscount	14 — 59.8 M-Electronics	15 — 56.5 k kiosk	16 — 53.4 Micasa
17 — 52.3 Spar	18 — 52.2 Dipl. Ing. Fust	19 — 51.0 Pfister	20 — 47.2 Volg
21 — 46.4 Carrefour	22 — 27.9 Valora		

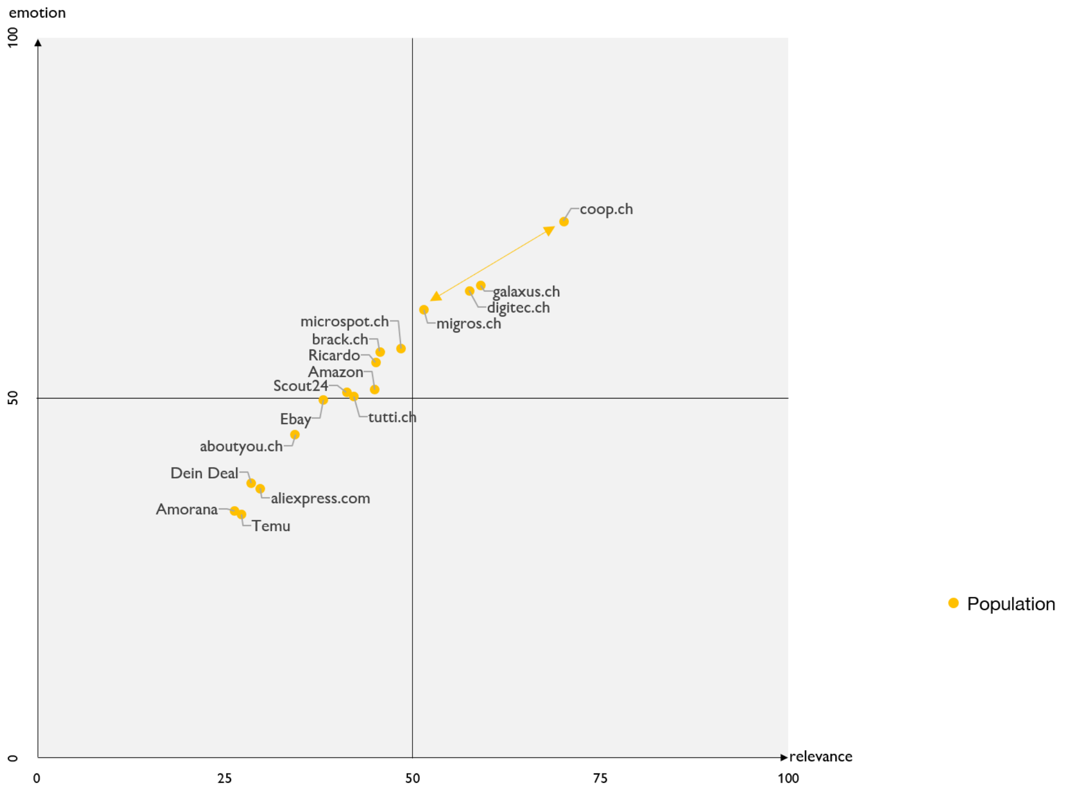
Ranking based on the "Emotionality" & "Relevance" dimension
Basis: Population, aged 16 - 29 years

Migros is once again the No. 1 brand in Switzerland

The figures for the overall population are virtually unchanged compared to the previous year. **Migros** is No. 1. While **Coop** was just ahead of **Migros** in French-speaking Switzerland in the past two years, **Migros** made gains in French-speaking Switzerland in 2023 and is once again the clear No. 1. One reason for this is probably the greater price awareness in French-speaking Switzerland; **M-Budget** was also able to increase its share in French-speaking Switzerland. **Migros** is No. 1 in all age segments; **Coop** was narrowly No. 1 among young people last year, but has clearly lost ground in this age segment.

*To be investigated in more detail on a brand by brand basis in follow up research

E-Commerce – Power Brands Population 2024



Coop.ch is the clear No. 1 in e-commerce among the population and in all segments, followed by Galaxus and Digitec. At the same time, coop.ch once again made significant gains compared to the previous year.

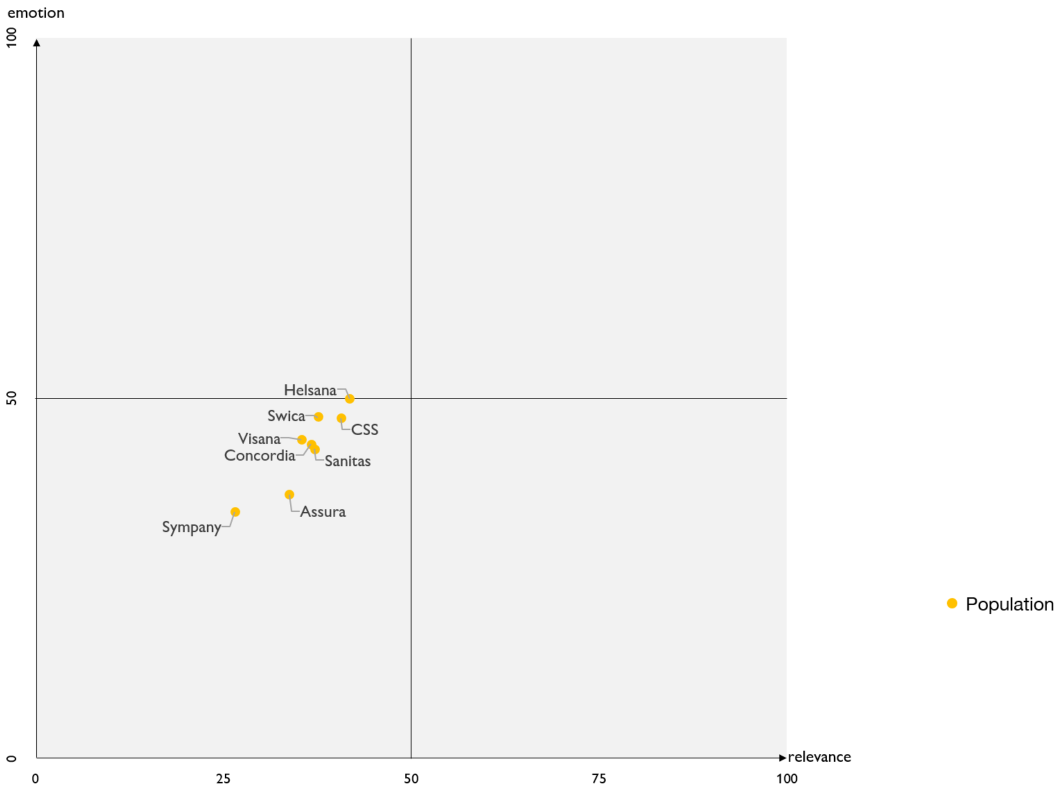
Rank	Brand	Score	Previous year
1	coop.ch	72.4	65.8
2	galaxus.ch	62.4	59.8
3	digitec.ch	61.3	56.8
4	migros.ch	56.8	51.5
5	microspot.ch	52.7	
6	brack.ch	51.0	
7	Ricardo	50.1	
8	Amazon	48.1	
9	tutti.ch	46.2	
10	Scout24	46.0	
11	Ebay	43.9	
12	aboutyou.ch	39.7	
13	aliexpress.com	33.6	
14	Dein Deal	33.4	
15	Temu	30.6	
16	Amorana	30.3	

In e-commerce, coop.ch is by far the No. 1 ahead of Galaxus

Coop.ch is the clear No. 1 in e-commerce among the population and in all segments, followed by Galaxus and Digitec. At the same time, coop.ch once again made significant gains compared to the previous year.

*To be investigated in more detail on a brand by brand basis in follow up research

Health Insurance – Power Brands Population 2024



1	Helsana	45.9
2	CSS	43.9
3	Swica	42.5
4	Concordia	40.2
5	Sanitas	40.0
6	Visana	39.8
7	Assura	35.2
8	Sympany	30.4

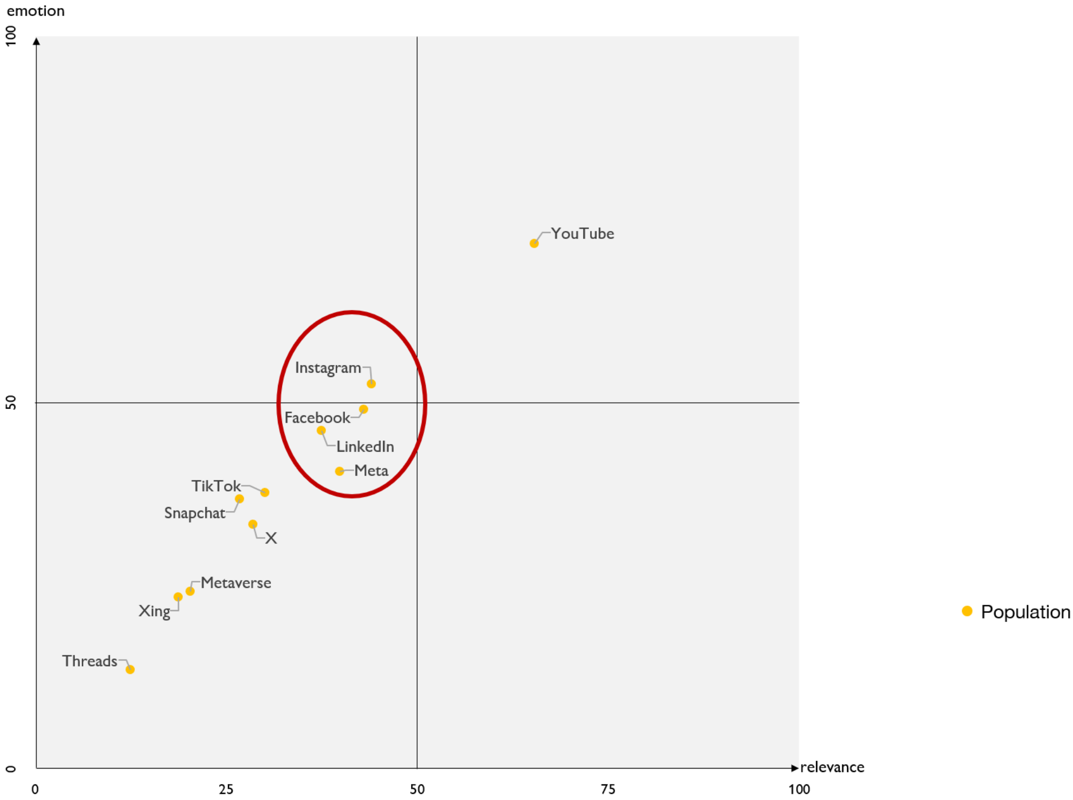
Ranking based on the "Emotionality" & "Relevance" dimension
Basis: Population

The brand image of health insurance companies is suffering

All health insurance companies are in the lower left quadrant. They should actually achieve higher scores, at least in terms of relevance, but they perform miserably, as they do in terms of popularity. **Helsana** still achieves the best scores, followed by **CSS** and **Swica**.

*To be investigated in more detail on a brand by brand basis in follow up research

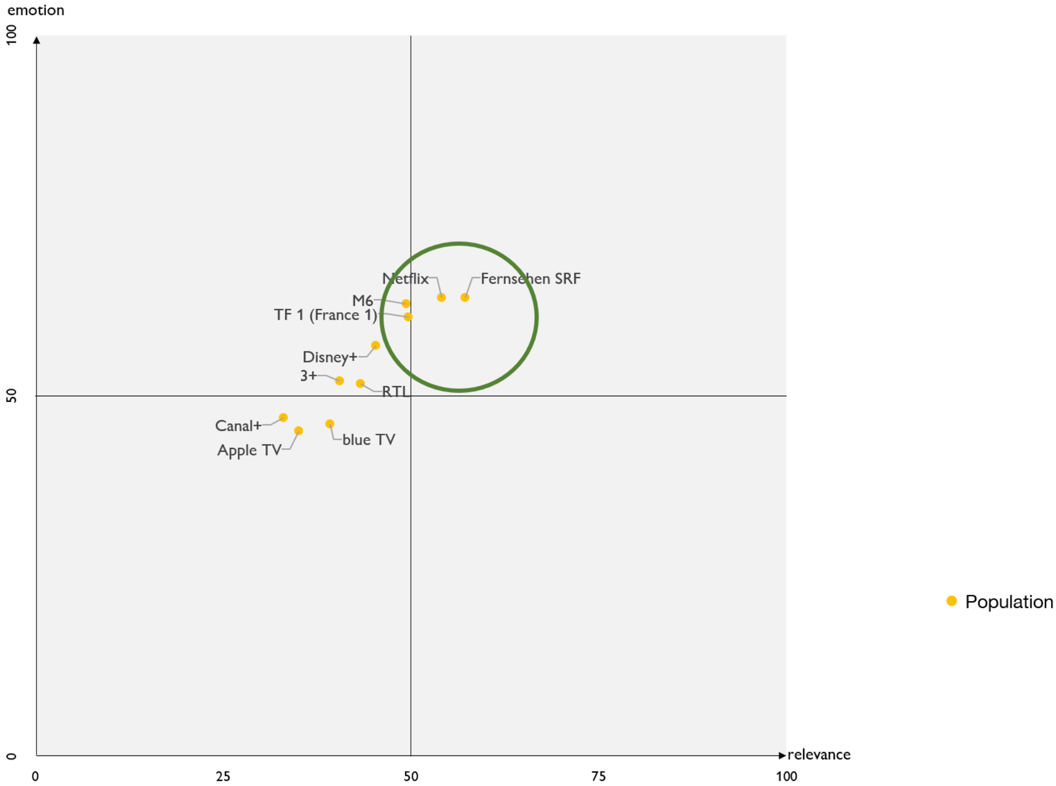
Social Media – Power Brands Population 2024



1	YouTube	68.6
2	Instagram	48.3
3	Facebook	46.1
4	LinkedIn	41.8
5	Meta	40.3
6	TikTok	33.9
7	Snapchat	31.8
8	X	30.9
9	Metaverse	22.3
10	Xing	21.2
11	Threads	13.0

*To be investigated in more detail on a brand by brand basis in follow up research

Television & Streaming – Power Brands Population 2024

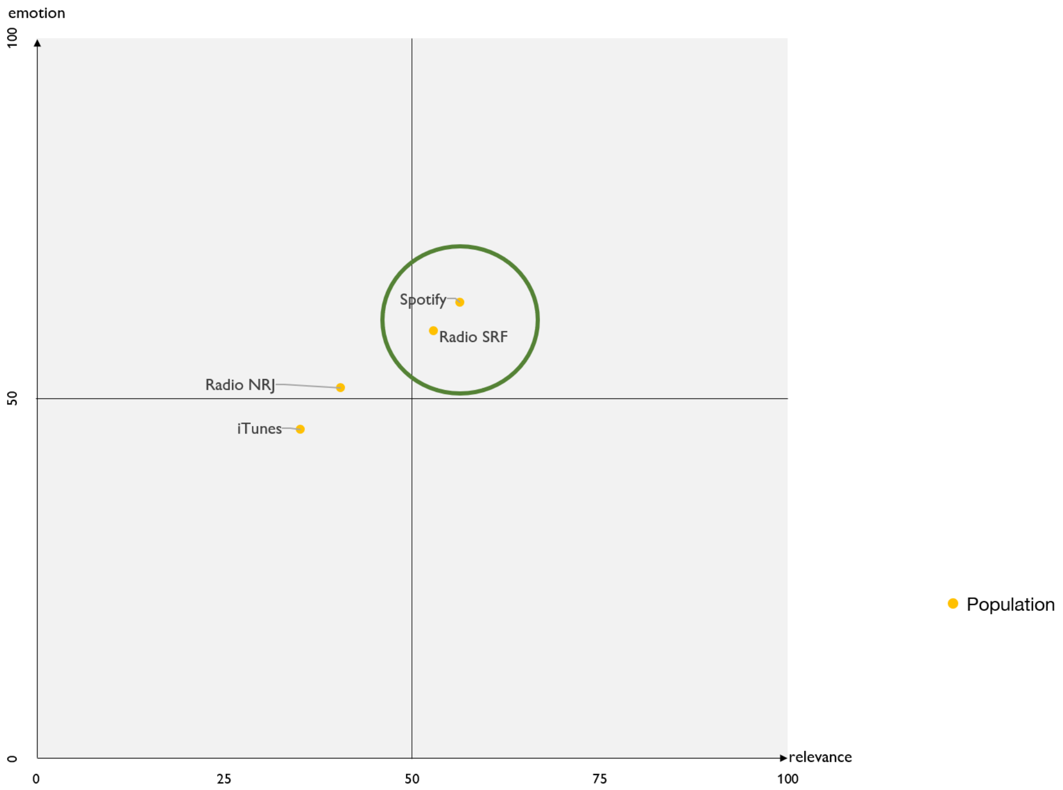


1 60.4 Fernsehen SRF	2 58.8 Netflix	3 56.1 M6	4 55.3 TF 1 (France 1)
5 51.1 Disney+	6 47.5 RTL	7 46.3 3+	8 42.7 blue TV
9 40.2 Apple TV	10 40.0 Canal+		

Ranking based on the "Emotionality" & "Relevance" dimension
Basis: Population

*To be investigated in more detail on a brand by brand basis in follow up research

Music & Radio – Power Brands Population 2024

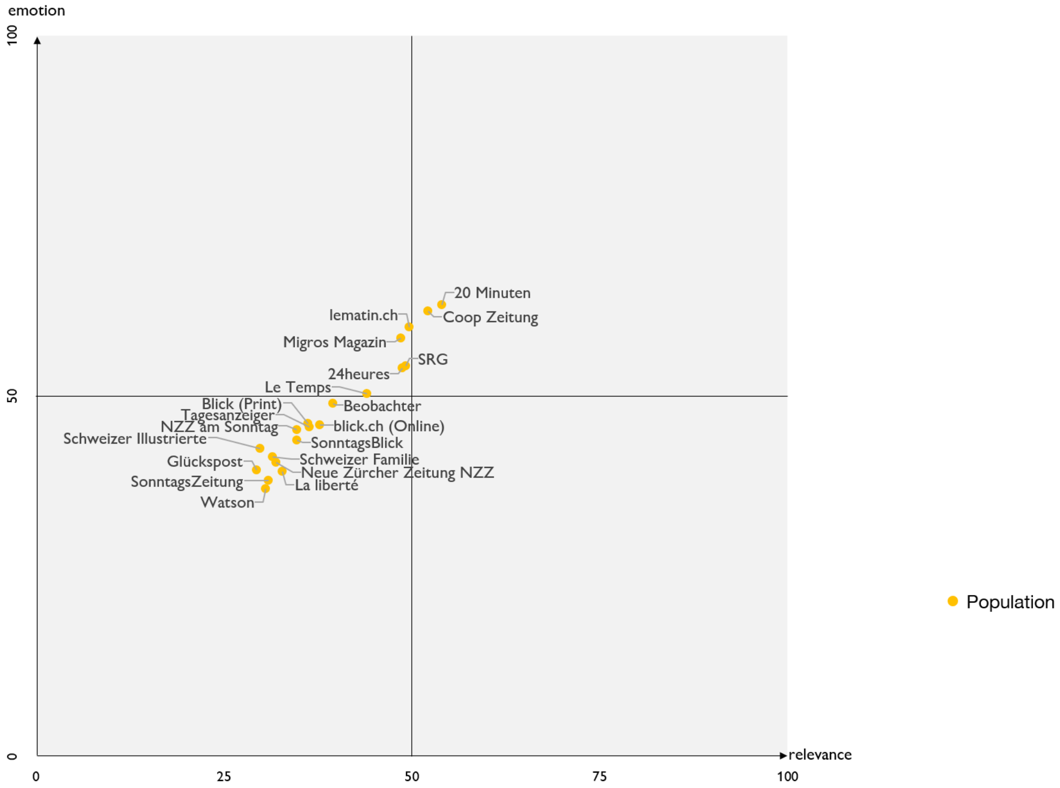


1 Spotify 59.9	2 Radio SRF 56.1	3 Radio NRJ 46.0	4 iTunes 40.4

Ranking based on the "Emotionality" & "Relevance" dimension
Basis: Population

*To be investigated in more detail on a brand by brand basis in follow up research

Traditional Media – Power Brands Population 2024



1	20 Minuten	58.3
2	Coop Zeitung	57.0
3	lematin.ch	54.6
4	Migros Magazin	53.4
5	SRG	51.7
6	24heures	51.3
7	Le Temps	47.2
8	Beobachter	44.3
9	blick.ch (Online)	41.9
10	Blick (Print)	41.2
11	Tagesanzeiger	41.0
12	NZZ am Sonntag	40.1
13	SonntagsBlick	39.3
14	Schweizer Familie	36.5
15	Neue Zürcher Zeitung NZZ	36.4
16	Schweizer Illustrierte	36.3
17	La liberté	36.2
18	SonntagsZeitung	34.6
19	Glückspost	34.5
20	Watson	33.9

Ranking based on the "Emotionality" & "Relevance" dimension
Basis: Population

The Swiss population's strongest media brands: YouTube, SRF television, Spotify, Netflix, 20Minuten, Coop newspaper and SRF radio - social media loses out

The fractalization of the media has also affected social media: There are more and more of them, with the result that the individual ones are being used less and are therefore becoming much less important. The negative trend in social media has already been clearly evident for two years and, apart from **YouTube, Instagram** & Co are losing ground and joining the ranks of traditional media. Of course, they are rated significantly better in the young segment of the under-30s - especially among the very young, for whom community building plays a special role - but even there, usage and interaction rates are known to be declining. The appeal of the new is over with social media.

*To be investigated in more detail on a brand by brand basis in follow up research

More and more media naturally also led to losses for traditional media. However, this shows that some strong media brands are holding their own: Even though **SRF television** and **SRF radio,** for example, are down on the previous year, their relevance and popularity among the population is still respectably positive; this also applies to free newspapers and other traditional media. The assertion that the young segment of the under-30s no longer consume traditional media is also refuted by this brand study: for example, **SRF television** is rated even better by the young than by the rest of the population.

The most popular cities among the Swiss population in 2024

1	62.2	Lucerne City
2	61.4	Berne City
3	56.5	Zurich City
4	54.9	Lausanne City
5	53.9	Basel City
6	53.2	Geneva City
7	52.8	St. Gallen City
8	50.3	Winterthur City

Ranking based on the "Emotionality" dimension
Basis: Population

The most popular cities among 16-29-year-olds in 2024

1	62.6	Berne City
2	60.2	Zurich City
3	57.5	Lucerne City
4	57.2	Lausanne City
5	53.9	Geneva City
6	53.8	St. Gallen City
7	53.4	Basel City
8	47.8	Winterthur City

Ranking based on the "Emotionality" dimension
Basis: Population aged 16 - 29 years

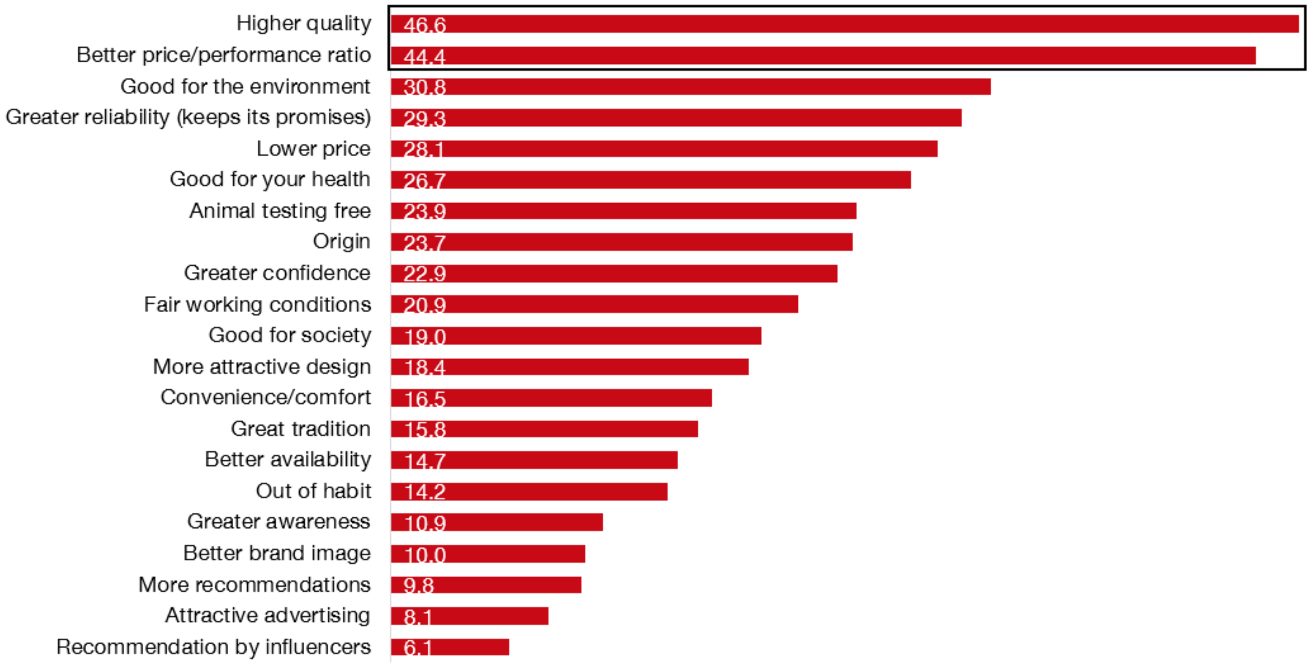
Lucerne just ahead of Bern as the most popular city in Switzerland

The two most popular cities in Switzerland are **Lucerne,** followed by **Berne. Zurich** is in third place, followed by **Lausanne, Basel** and **Geneva.** Among the under-30s, the order is slightly different and clearer: **Berne** is No. 1 here, followed by **Zurich** and **Lucerne.**

*To be investigated in more detail on a brand by brand basis in follow up research

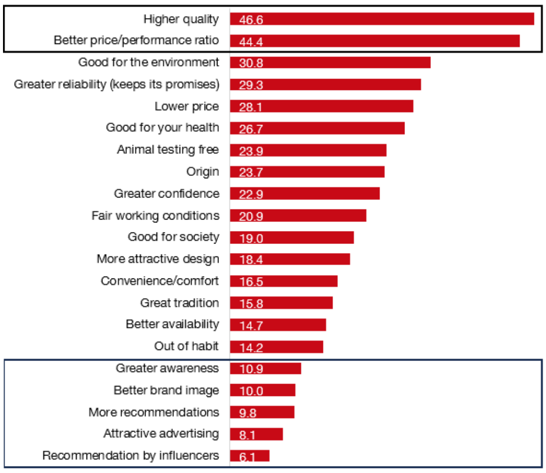
Special survey: Brand preference

Question: What are the 5 most important factors that make you prefer one brand over another?



Figures in percent
Multiple answers (up to 5) possible
Basis: Population, N=2'631

Top reasons to give preference to a brand



Total	G-CH	F-CH	Males	Females	16-29y	30-49y	50-65y	City	Countryside
46.6	48.6	41.3	51.3	42.0	37.5	49.0	51.8	45.4	49.7
44.4	42.0	50.8	45.3	43.4	31.9	43.5	57.8	43.1	47.4
30.8	30.6	31.5	26.2	35.4	25.0	29.9	37.9	29.1	35.2
29.3	30.2	26.8	32.0	26.6	18.9	28.3	41.0	29.4	29.0
28.1	27.9	28.5	30.8	25.4	26.5	27.3	30.8	28.4	27.1
26.7	22.2	38.9	22.7	30.6	24.2	27.3	28.3	26.6	27.0
23.9	23.2	25.9	16.0	31.8	24.7	21.5	27.0	22.0	28.7
23.7	23.3	24.9	22.6	24.8	22.2	23.9	24.8	22.4	27.0
22.9	22.9	23.0	25.1	20.7	18.1	25.2	23.9	23.6	21.2
20.9	21.9	18.0	18.1	23.6	17.5	18.7	27.5	20.4	22.0
19.0	16.3	26.3	19.2	18.8	19.3	19.1	18.5	19.8	17.1
18.4	19.1	16.3	19.7	17.1	21.4	18.8	14.7	18.6	17.7
16.5	18.0	12.5	16.9	16.2	20.8	15.6	13.9	17.9	13.2
15.8	16.1	14.8	16.1	15.5	15.3	16.4	15.2	15.7	15.9
14.7	16.0	11.3	14.9	14.6	15.4	15.8	12.3	16.3	10.8
14.2	14.6	13.1	14.3	14.0	16.4	14.6	11.3	13.4	16.1
10.9	11.5	9.4	11.6	10.3	16.2	11.6	4.6	11.9	8.4
10.0	9.1	12.3	9.2	10.7	13.6	11.6	3.8	10.9	7.6
9.8	11.2	6.2	9.1	10.6	14.3	10.5	4.5	11.0	7.0
8.1	9.1	5.5	7.3	8.9	13.8	7.9	2.8	8.5	7.0
6.1	6.8	4.1	4.9	7.2	10.1	6.3	1.8	6.9	4.0

Figures in percent
Multiple answers (up to 5) possible
Basis: Population, N=2'631

*To be investigated in more detail on a brand by brand basis in follow up research

The wallet is more important to consumers than environmental protection: quality and better value for money are the clear top reasons for purchasing decisions. French-speaking Switzerland is significantly more price-conscious than German-speaking Switzerland, as are women and older people; "good for the environment" is in third place, although this criterion is less important to young people than to other age segments

Quality and value for money are by far the top two reasons given for purchasing decisions. While quality is the top priority in German-speaking Switzerland, in French-speaking Switzerland it is value for money. Women and the older segment of 50-65-year-olds are also more price-conscious.

"Good for the environment" comes in third place, just ahead of reliability and low price. It is striking that the environmental criterion is the least important to young people. Other CSR criteria, such as fair working conditions and good for society, also generally score poorly. The sense of responsibility of companies and their brands (CSR / ESG) is obviously less important in purchasing decisions than the current marketing articles on this topic would suggest.

*To be investigated in more detail on a brand by brand basis in follow up research

4. How you benefit from the study

Looking into the future of your brand with the Brand Indicator Switzerland 2024

A) Presentation and analysis of your brand(s) and sector(s) including segmentation (age segments, gender, city/country, etc.) as well as comparisons with competitors and previous year's developments
B) Survey of additional brands and sub-brands as well as additional specific questions

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