BIS

BRAND INDICATOR SWITZERLAND

2023

.Imagine another viewpoint

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PRFACT

Content

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

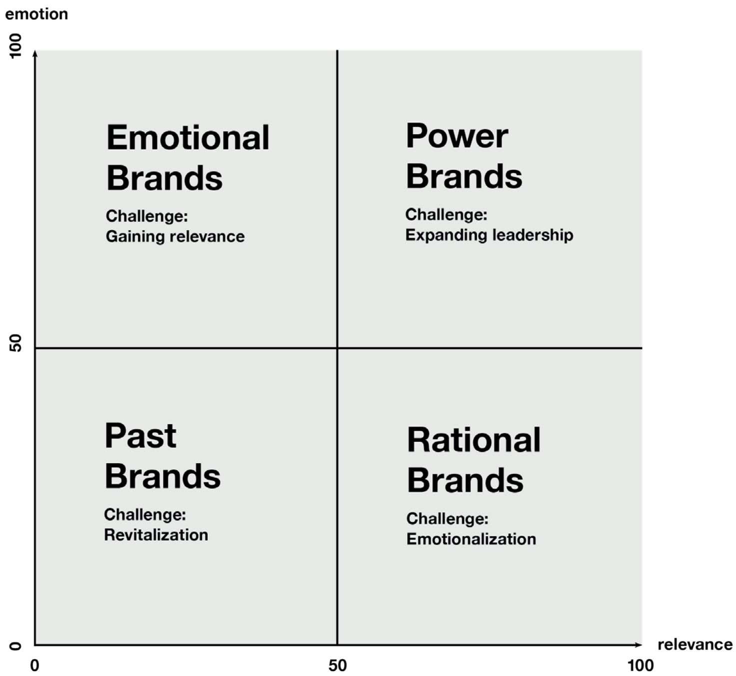
1. BIS concept of study

Your indicator for future brand success

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.").**

In addition, the Brand Indicator Switzerland also reveals a view into the future by contrasting the opinion of the population with the opinion of Influencial Opinion Leaders (IOL). Because the latter are ahead of the curve – they influence their followers, who follow trends with a lag - their opinion is an indicator for predicting the future success or failure of brands.

Concrete recommendations for action in marketing and communication can be derived from the results. The goal of the BIS is to provide CEOs and brand managers with a tool for making the right decisions.



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

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Sample size
N = 2‘279 (DCH / WCH)

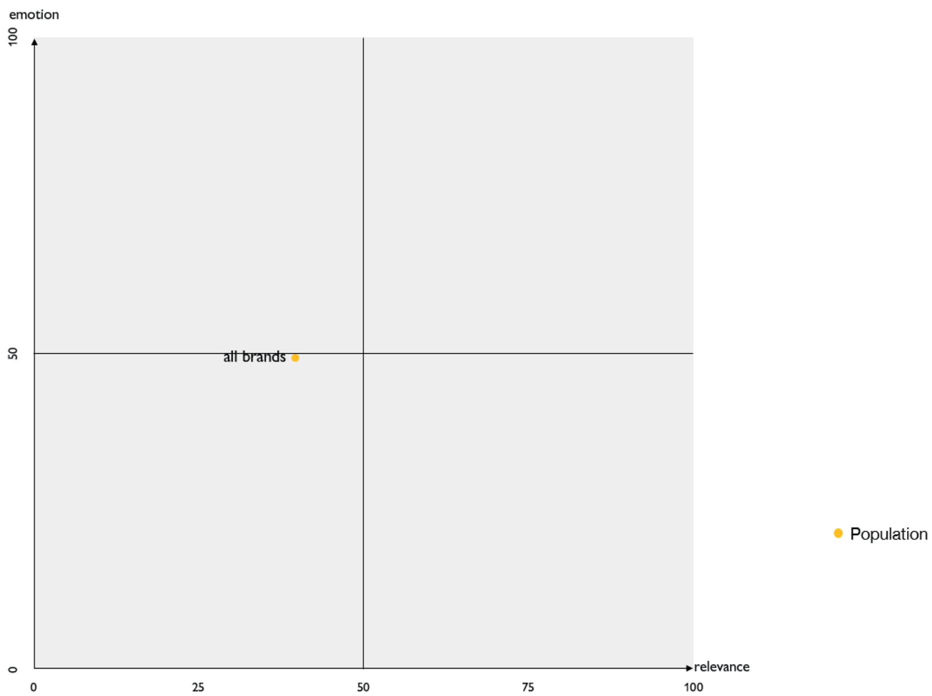
Statistical range of variation
A sample size of N = 2,279 yields a statistical range of ±2.1 % with a confidence interval of 95 %. For analyses based on sub-segments (e.g. men/women), the sample size used decreases and the statistical sample size used decreases and the statistical range of variation increases.

Survey period
November 21, 2022 – November 28, 2022

Profil Influential Opinion Leader (IOL)

- Number of IOLs in the population: 12.2 %
- 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: 17 years
- Oldest IOL: 65 years
- Arithmetic average: 34 years

Average rating of all brands – population



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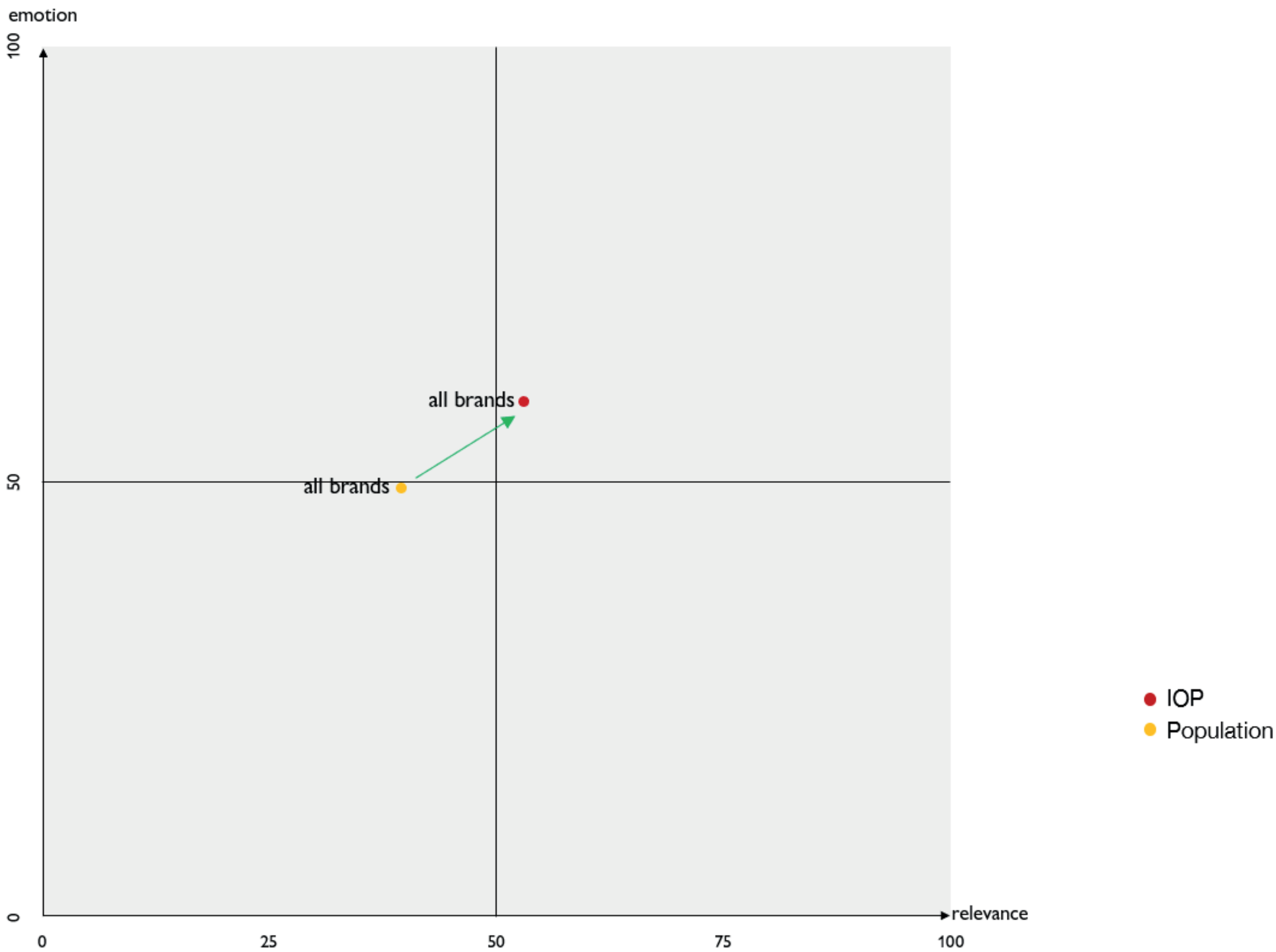
Average rating of all brands – population & IOLs

It is in the nature of IOLs that they are more brand affine than the average of the total population. If the deviation from the mainstream is more positive than the average delta of around 10 points or even negative, then this is a clear indicator of future brand success or failure.

Δ Relevance: 13.5 points
Δ Emotion: 9.9 points



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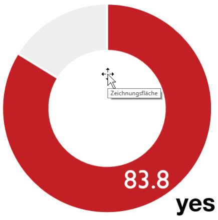
Special survey on the topic of sustainability: Sustainable brands are becoming more important, according to 83.8 % of the population

Question: In your opinion, are sustainable brands becoming more important?



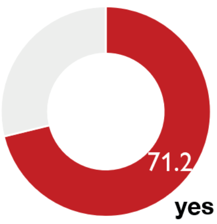
	Total	German-CH	French-CH	Male	Female	16-29y	30-49y	50-65y	City	Countryside
Yes	83.8	82.7	86.9	81.7	85.9	84.1	85.8	80.3	85.4	81.1
No	16.2	17.3	13.1	18.3	14.1	15.9	14.2	19.7	14.6	18.9

Comment: Even if the value has worsened minimally by 2.3 points compared to the previous year sustainability remains an ongoing issue in all segments of the population.

Date in percent
Basis: population, N=2'279

Special survey on the topic of online shopping: More online shopping in the future, according to 71.2 % of the population

Question: Will you shop online more often in the future?



	Total	German-CH	French-CH	Male	Female	16-29y	30-49y	50-65y	City	Countryside
Yes	71.2	72.3	68.2	73.3	69.1	79.4	79.2	50.6	74.1	66.2
No	28.8	27.7	31.8	26.7	30.9	20.6	20.8	49.4	25.9	33.8

Comment: Online shopping will compete even more with stationary trade in the future; People in the countryside are more reluctant than in the city and about 50 % of the over 50-year-olds are reluctant to shop online.

Figures in percent
Basis: Population, N=2,279

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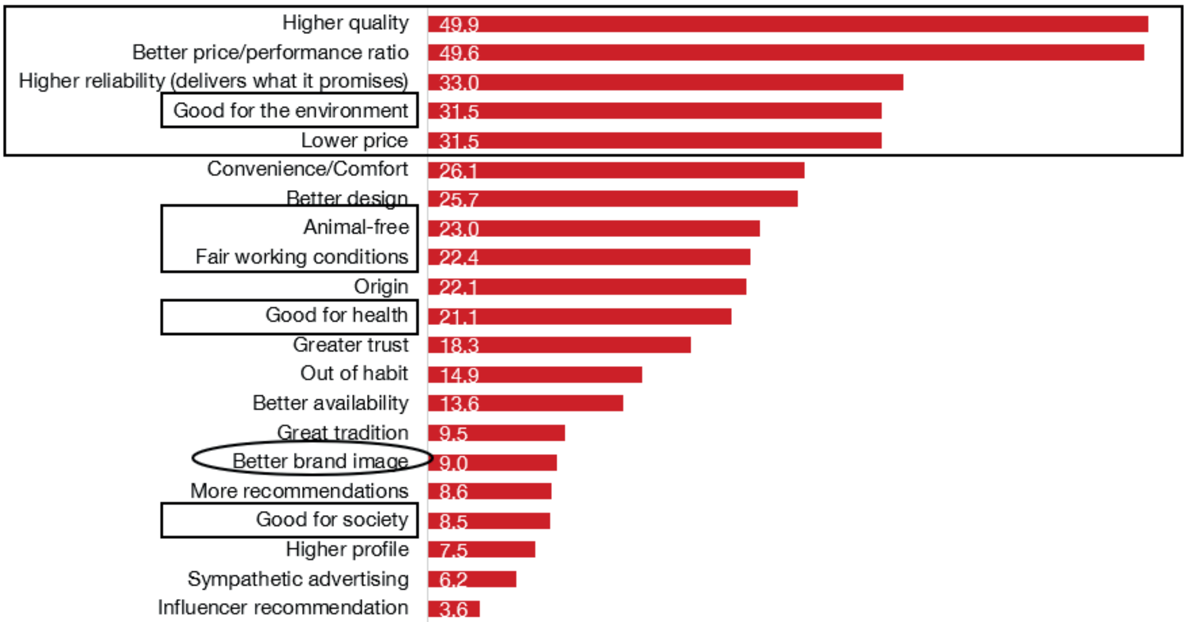
Special survey on the topic of brand preference: Top 5 reasons to give preference to a brand

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=2,279

Quality, value for money and reliability are the 3 top reasons in purchasing decisions, followed by "good for the environment".

To begin with: purchasing decisions are anything but rational - the results of this rational question about brand preference should be taken with a pinch of salt: For hardly anyone will admit that they bought a product because of its image or advertising.

The main intention of this question was to find out how important the sense of responsibility of companies and their brands (CSR / ESG) is in purchasing decisions. Quality, price-performance and reliability were named as the top 3 reasons for purchasing decisions. **While in quality comes first in German-speaking Switzerland, in French-speaking Switzerland it is the price-performance ratio.**

When quality, price and reliability are right, then environmental awareness becomes an important criterion. Other ethical factors such as non-animal testing, fair working conditions, good for health and good for health and good for society still play a minor role, but **the sum of these values shows that ethical of these values shows that ethical considerations are becoming more important when shopping.**

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2. BIS 2023 Rankings: The top brands

The top brands of the Swiss population

01	WhatsApp	78.7
02	Migros	78.2
03	Google	75.0
04	Coop	72.2
05	YouTube	71.1
06	M-Budget	68.9
07	Mastercard	68.5
07	Twint	68.5
09	Die Post	68.4
10	Le Gruyère	68.4

Ranking on the basis of the "emotionality" and "relevance" dimensions
Basis: population

The top 100 brands of the Swiss population

1 WhatsApp (2)	78.7	26 IP Suisse	63.6	51 Lidl (52)	60.0	76 Victorinox (50)	57.3
2 Migros (1)	78.2	27 Migros Bio	63.5	52 TCS (67)	59.9	77 Apple (68)	57.1
3 Google (3)	75.0	28 Tempo	63.3	53 Schweizer Fleisch (39)	59.8	78 Kantonalbanken (63)	57.0
4 Coop (5)	72.2	29 Thomy (15)	63.3	54 galaxus.ch (43)	59.8	79 Ochsner Sport (78)	56.9
5 YouTube (6)	71.1	30 Coop City (neu)	63.0	55 Coop Bau & Hobby	59.6	80 SwissMilk	56.8
6 M-Budget (neu)	68.9	31 Microsoft (16)	63.0	56 Rivella (22)	59.5	81 digitec.ch (43)	56.8
7 Mastercard (7)	68.5	32 Bio Suisse (17)	62.7	57 Schweiz Toursimus (45)	59.5	82 Sony (47)	56.7
8 Twint (23)	68.5	33 Nivea (36)	62.6	58 20 Minuten (44)	59.4	83 Dar-Vida	56.7
9 Die Post (9)	68.4	34 Lego	62.4	59 M-Electronics	59.3	84 Migros Magazin	56.6
10 Le Gruyère (10)	68.4	35 Samsung (37)	62.1	60 Kägi (29)	59.1	85 iPhone (Apple) (94)	56.5
11 Migros Cumulus (neu)	67.8	36 Maestro	62.0	61 Emmentaler (46)	59.1	86 Heinz	56.5
12 SBB (11)	67.5	37 Ovomaltine (18)	61.9	62 Chocolat Frey (26)	59.1	87 Manor	56.4
13 Zweifel (8)	66.7	38 VISA	61.8	63 Kambly (42)	59.0	88 Spotify (85)	56.3
14 Denner (28)	66.3	39 Schweiz. Rotes Kreuz (neu)	61.8	64 Ragusa	59.0	89 Philips (60)	55.9
15 Swiss made	66.0	40 Aldi Suisse (35)	61.6	65 Swiss (33)	59.0	90 Adidas (59)	55.9
16 Coop Qualité & Prix (neu)	65.9	41 Landi (neu)	61.6	66 Valser (54)	58.7	91 Evian (81)	55.7
17 Lindt (6)	65.9	42 Fernsehen SRF (12)	61.5	67 Migros DO IT+GARDEN	58.4	92 Betty Bossi	55.6
18 coop.ch (vorher coop@home)	65.8	43 Emmi (27)	61.4	68 Swisscom (34)	58.2	93 Miele (93)	55.6
19 Cailler (14)	64.9	44 Fairtrade (neu)	61.1	69 Radio SRF (62)	58.1	94 Caran d'Ache	55.3
20 Toblerone (21)	64.6	45 Naturaplan (25)	60.8	70 Jumbo	57.9	95 k kiosk (65)	55.3
21 Barilla (19)	64.6	46 Netflix (31)	60.7	71 WWF Schweiz	57.8	96 C&A	55.2
22 Coop Supercard (neu)	64.4	47 Max Havelaar (neu)	60.6	72 Post Finance (75)	57.6	97 Dosenbach (64)	55.2
23 IKEA (13)	64.4	48 Interdiscount (56)	60.5	73 Ramseier	57.4	98 Swatch (79)	55.1
24 Prix Garantie (neu)	64.0	49 Wernli (40)	60.4	74 TerraSuisse	57.3	99 M6	55.0
25 Ricola (24)	63.7	50 Appenzeller (Käse) (38)	60.0	75 Electrolux (91)	57.3	100 V-Zug (82)	55.0

Ranking on the basis of the "emotionality" and "relevance" dimensions
Basis: population

Comparisons with the previous year in brackets; however, these must be viewed in perspective, as new brands were included in the survey (e.g. sub-brands like M-Budget or labels like Fairtrade).

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

WhatsApp, Migros, Google, Coop and YouTube are the 5 top brands of the Swiss population; coop.ch, Twint and Denner are the biggest climbers

The ranking of the top 10 brands - the aggregate of popularity and relevance - describes people's everyday lives in a compact way: Sending messages (WhatsApp), shopping (Migros, Coop), search and find (Google), watch films (YouTube), pay (Twint, Mastercard), receive and send parcels (Post).

A direct comparison of the top 100 brands with last year's ranking is difficult because some new brands were included in the survey; therefore the individual rankings should be interpreted with caution and in perspective: The biggest climbers in the top 25 brands include coop.ch (formerly coop@home), Twint and Denner; Lindt and Ikea lose a few ranks. The clear biggest losers in the ranks 25 to 100 are all popular traditional Swiss brands, some of which are even leaders in their respective categegories: SRF (from 12 to 42), Ovomaltine (from 18 to 37), Rivella (from 22 to 56), Chocolat Frey (from 26 to 62), Kägi (from 29 to 60), Swiss (from 33 to 65), Swisscom (from 34 to 68). This is because the ranking is still dominated by Swiss brands still dominate the rankings - the law that "Swiss people love Swiss brands" has not changed despite still holds true despite digitalisation and the rise of new brands: 70 % of the top 100 brands are Swiss.

It is also striking that well-known and former top brands are no longer represented in the top 00, such as Swatch, Nestlé, Hero or Bell, nor are global giants like Nike, Coca-Cola or McDonalds. And those who want to find car brands or Instagram in the top 100 are also looking in vain (Instagram was still ranked 88th last year). Even though four of the top 10 brands - WhatsApp in first place, Google, YouTube and Twint - are digital, this should not obscure the fact that only very few purely digital brands have managed to make it into the top 100, and even fewer have managed to establish themselves in the long term. Digitalisation is not synonymous with disruption, but in most cases a tool that numerous traditional Swiss brands are using very successfully for their further development and transformation. transformation.

The top 10 brands of 16 - 29 year olds

01	Google	83.2
02	WhatsApp	82.2
03	iPhone	78.5
04	Netflix	78.4
05	YouTube	78.3
06	Coop	76.5
07	Twint	75.6
08	Die Post	74.7
09	Migros	74.7
10	IKEA	74.1

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

The top 100 brands of 16 – 29 year olds

1 Google (3)	83.2
2 Whatsapp (1)	82.2
3 iPhone (Apple) (85)	78.5
4 Netflix (31)	78.4
5 YouTube (6)	78.3
6 Coop (5)	76.5
7 Twint (8)	75.6
8 Die Post (9)	74.7
9 Migros (2)	74.7
10 IKEA (23)	74.1
11 Mastercard (7)	73.4
12 Spotify (nicht Top-100)	72.0
13 Apple (77)	70.6
14 SBB (12)	69.3
15 Prix Garantie (24)	68.5
16 Zweifel (13)	68.3
17 Microsoft (31)	67.9
18 Instagram (nicht Top-100)	67.7
19 M-Budget (6)	67.3
20 coop.ch (18)	66.6
21 Lindt (17)	65.8
22 Denner (14)	65.4
23 Coop Supercard (22)	64.6
24 Coop City (30)	64.4
25 Coop Qualité & Prix (16)	64.3
26 Ovomaltine (37)	64.1
27 Nivea (33)	64.0
28 VISA (38)	63.8
29 Aldi Suisse (40)	63.3
30 Nike (nicht Top-100)	63.3
31 Swiss (65)	63.1
32 Barilla (19)	63.0
33 Toblerone (20)	62.9
34 Interdiscount (48)	62.8
35 digitec.ch (81)	62.7
36 Nestea (nicht Top-100)	62.5
37 Migros Cumulus (nicht Top-100)	62.4
38 Lego (34)	62.4
39 Adidas (90)	62.3
40 Lidl (51)	61.9
41 Fairtrade (44)	61.8
42 Emmi (43)	61.6
43 Maestro (36)	61.6
44 TCS (52)	61.5
45 Bio Suisse (32)	61.5
46 Heinz (86)	61.5
47 IP Suisse (26)	61.4
48 Evian (91)	61.0
49 Post Finance (72)	61.0
50 20 Minuten (58)	61.0
51 Fernsehen SRF (42)	60.8
52 Tempo (28)	60.8
53 galaxus.ch (54)	60.5
54 k kiosk (95)	60.3
55 Sony (82)	59.8
56 Swiss made (15)	59.8
57 Flughafen Zürich (nicht Top-100)	59.8
58 Zalando (nicht Top-100)	59.6
59 Migros Bio (27)	59.6
60 Le Gruyère (10)	59.5
61 Max Havelaar (47)	59.5
62 Schweizerisches Rotes Kreuz (39)	58.7
63 Rivella (56)	58.6
64 TF 1 (France 1)	58.3
65 Ricola (25)	58.3
66 Cailler (19)	58.0
67 Manor (87)	57.9
68 Philips (89)	57.8
69 Thomy (29)	57.6
70 BMW (nicht Top-100)	57.5
71 Wernli (49)	57.3
72 Tripadvisor (nicht Top-100)	57.3
73 Capri Sun (nicht Top-100)	57.1
74 H&M (nicht Top-100)	57.0
75 Betty Bossi (92)	56.7
76 Naturaplan (45)	56.7
77 Ochsner Sport (79)	56.6
78 Apple Pay (nicht Top-100)	56.4
79 Magnum (nicht Top-100)	56.4
80 Amazon (nicht Top-100)	56.4
81 Landi (41)	56.4
82 Radio SRF (69)	56.2
83 Audi (nicht Top-100)	56.2
84 Kantonalbanken (78)	56.1
85 Coca-Cola (nicht Top-100)	56.1
86 M6 (nicht Top-100)	55.7
87 Schweizer Fleisch (53)	55.6
88 M-Electronics (59)	55.3
89 Jumbo (70)	55.2
90 Dar-Vida (83)	55.1
91 DHL (nicht Top-100)	55.1
92 Samsung (35)	55.0
93 AirBnB (nicht Top-100)	54.8
94 Mercedes (nicht Top-100)	54.6
95 Ragusa (64)	54.5
96 C&A (96)	54.2
97 Les Hôpitaux Universitaires de Genève (HUG)	54.2
98 Samsung Galaxy (nicht Top-100)	54.1
99 Dipl. Ing. Fust (nicht Top-100)	54.1
100 Valser (66)	53.9

Ranking on the basis of the "emotionality" and "relevance" dimensions
Basis: population, aged 16 - 29 years

Comparison with the ranking of the total population in parentheses

A digital generation gap is discernible and, in addition, the importance of Swiss brands, especially labels, is declining.

If one compares the ranking of the total population with the ranking of the under-30s, a digital generation gap can be seen: **The fact that the everyday life of the under 30s is significantly more digital is reflected in the ranking of the young people's top brands: 6 of the top 10 brands are digital, and with iPhone, Netflix, Spotify, Apple, Microsoft and Instagram, further digital brands are added to the top 25 brands, which in the population as a whole are all in the lower ranks or even not in the top 100 at all.**

What also stands out: **While 70 % of the brands in the overall population ranking are Swiss brands, this proportion drops to 50 % among the under-30s - loyalty to Swiss brand heritage is significantly lower among the young. This is also reflected in the importance of the "Swiss made" label: The label is ranked 15th among the population as a whole, and 56th among young people.** (the result is basically even clearer because the total population includes the young).

Further generational differences are particularly evident in brands that perform significantly worse among those under 30 compared to the overall population: M-Budget (19 vs. 6), Barilla (32 vs. 19), Toblerone (33 vs. 20), Bio Suisse (32 vs. 45), IP Suisse (47 vs. 26), Tempo (52 vs. 28), Swiss made (56 vs. 15), Migros Bio (59 vs. 27), Le Gruyère (60 vs. 10), Max Havelar (61 vs. 47), Swiss Red Cross (62 vs. 39), Ricola (65 vs. 25), Cailler (66 vs. 19), Thomy (69 vs. 29), Wernli (71 vs. 49), Naturaplan (76 vs. 45), Landi (81 vs. 41), Radio SRF (82 vs. 69), Schweizer Fleisch (87 vs. 53), M-Electronics (88 vs. 59), Samsung (92 vs. 35), Ragusa (95 vs. 64), Valser (100 vs. 66). **It is striking that many labels drop in the ranking of the young - an indication that they might lose credibility and importance.**

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

The top 10 brands of the future

01 Google 85.3	02 WhatsApp 82.4	03 Coop 79.9	04 Coop Supercard 79.2
05 Twint 78.9	06 Apple 76.7	07 Swiss 76.1	08 Lidl 76.0
09 VISA 74.1	10 Denner 72.4		

Ranking on the basis of the "relevance" dimension
Basis: IOLs

The 100 top brands of the future

1 Google (3/1)	82.8	26 IP Suisse	70.9	51 Alnatura	67.5	76 SBB	64.3
2 Whatsapp (2/2)	82.4	27 iPhone (Apple)	70.9	52 H&M	67.2	77 Nestea	64.3
3 Coop (5/6))	80.4	28 Microsoft	70.9	53 Ragusa	67.2	78 Magnum	64.1
4 Coop Supercard (22/23)	79.2	29 BMW	70.6	54 Trivago	66.8	79 DHL	64.1
5 Twint (8/7)	78.9	30 Tempo	70.6	55 OBI	66.7	80 Sony	64.0
6 Apple (68/13)	78.6	31 Post Finance	70.4	56 Kägi	66.7	81 booking.com	63.9
7 Swiss (65/31)	77.8	32 Mercedes	70.4	57 Valser	66.6	82 TF 1 (France 1)	63.8
8 Netflix (46/4)	77.2	33 Coop Zeitung	69.9	58 Unicef Schweiz und Liechtenstein	66.4	83 Disney+	63.7
9 YouTube (5/5)	77.0	34 Coop Qualité & Prix	69.8	59 Swiss made	66.2	84 Die Post	63.6
10 Lidl (51/40)	75.5	35 Ovomaltine	69.7	60 Hornbach	66.2	85 Swatch	63.6
11 VISA (38/28)	75.0	36 Philips	69.5	61 Siemens	66.0	86 Jumbo	63.6
12 Lindt (17/21)	74.7	37 Ricardo	69.4	62 Bio Suisse	66.0	87 galaxus.ch	63.6
13 Heinz (86/46)	74.5	38 Amazon	69.2	63 Salt	65.9	88 Lufthansa	63.5
14 Instagram (nicht Top-100/18)	74.4	39 k kiosk	68.9	64 Interdiscount	65.8	89 Facebook	63.5
15 Denner (28/22)	73.3	40 Manor	68.9	65 Fernsehen SRF	65.6	90 tutti.ch	63.3
16 Zweifel (13/16)	73.1	41 M-Electronics	68.8	66 Le Gruyère	65.6	91 DeLonghi	63.3
17 Mastercard (7/11)	72.8	42 Ricola	68.8	67 TerraSuisse	65.6	92 M-Budget	63.2
18 Prix Garantie (24/15)	72.3	43 Les Hôpitaux Universitaires de Genève	68.8	68 C&A	65.6	93 Dar-Vida	63.2
19 Coop City (30/24)	72.1	44 Barilla	68.7	69 Electrolux	65.6	94 Ochsner Sport	63.2
20 Nespresso (nicht Top-100)	71.9	45 Toblerone	68.7	70 Audi	65.4	95 Cumulus Kreditkarte (Migros)	62.9
21 coop.ch (18/20)	71.8	46 Aldi Suisse	68.3	71 Migros DO IT+GARDEN	65.2	96 Migros Cumulus	62.8
22 Samsung (35/92)	71.6	47 Canal+	68.3	72 Hero	64.8	97 Zermatt	62.5
23 Nivea (69/27)	71.3	48 Lego	68.2	73 Betty Bossi	64.8	98 Caran d'Ache	62.5
24 Migros (2/9)	71.1	49 Appenzeller (Käse)	68.0	74 Evian	64.7	99 Emmi	62.5
25 IKEA (23/10)	71.0	50 Adidas	67.8	75 Dosenbach	64.6	100 Migros Bio	62.5

Comparisons with the ranking of the total population and the under-30s in parentheses.

Ranking on the basis of the "emotionality" and "relevance" dimensions
Basis: IOLs

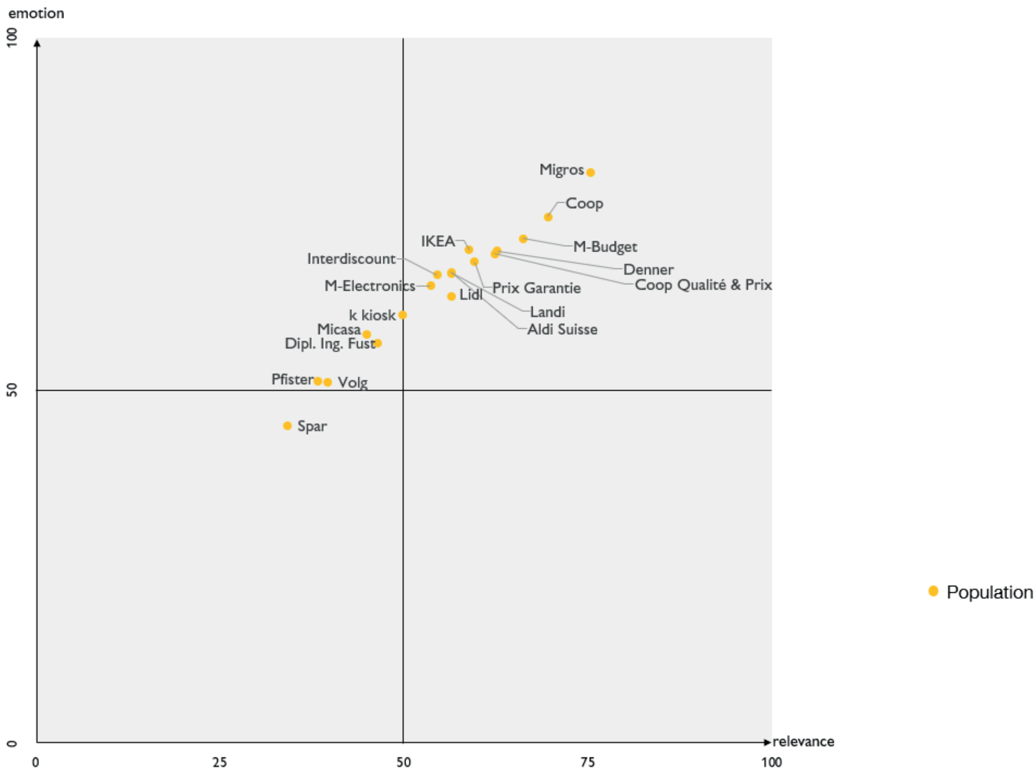
Google, WhatsApp, Coop incl. Supercard, YouTube, Twint, Apple, Swiss, Netflix, YouTube are the brands of the future; Migros loses significantly

If one compares the ratings of Influencial Opinion Leaders (IOLs) with those of the population as a whole, as with the under-30s, a digital divide is also discernible here: **6 of the top 10 brands are digital and there are more digital brands in the top 100. Coop makes it to the podium in 3rd place among the brand-affine IOLs, while competitor Migros is only in 24th place. Of course, the IOLs are particularly brand-savvy and therefore per se rather "Coop children", but the fact that, in addition to Coop and Coop Supercard in the top ranks and with Lidl in 10th place, Denner (15), Prix Garantie (18), Coop City (19) as well as coop.ch (21), no less than 7 retail brands are pushing ahead of Migros, shows a poor momentum for the future - if Migros does not succeed in appealing significantly better to younger generations again, they will lose the top positions they have held for years. for years with the overall population.**

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

3. BIS 2023: Insight into some sectors (extract)

Retail – Population



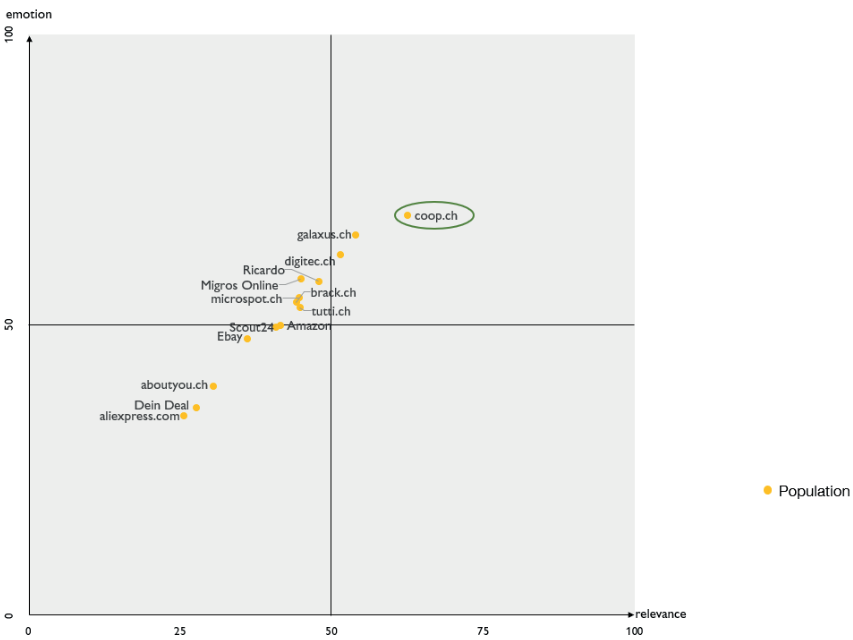
Retail – Young vs. old

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

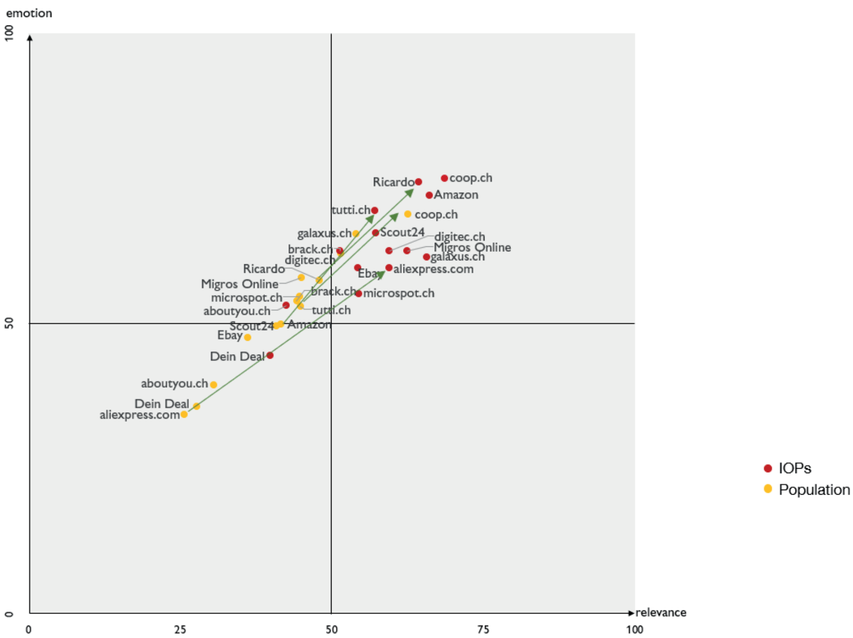
Migros may be the most popular brand in Switzerland, but for the first time Coop is No. 1 among the under 30s, No. 1 among IOLs and No. 1 in French-speaking Switzerland.

Migros is the most popular brand among the Swiss population as a whole, and in the ranking of the top 100 brands it is No. 2 after WhatsApp. And yet, as of this year, it is a thing of the past that Migros is the undisputed industry leader and "standard measure" of retail: Coop has not only overtaken Migros in French-speaking Switzerland, but, for the first time in the history of the BIS, also performs best in the young segment under 30 years of age and among IOLs with an affinity for the brand. An indicator that the Migros brand has come under pressure - if this trend continues, Coop could soon be ahead of Migros in German-speaking Switzerland as well.

E-Commerce – Population



E-Commerce – Future trend



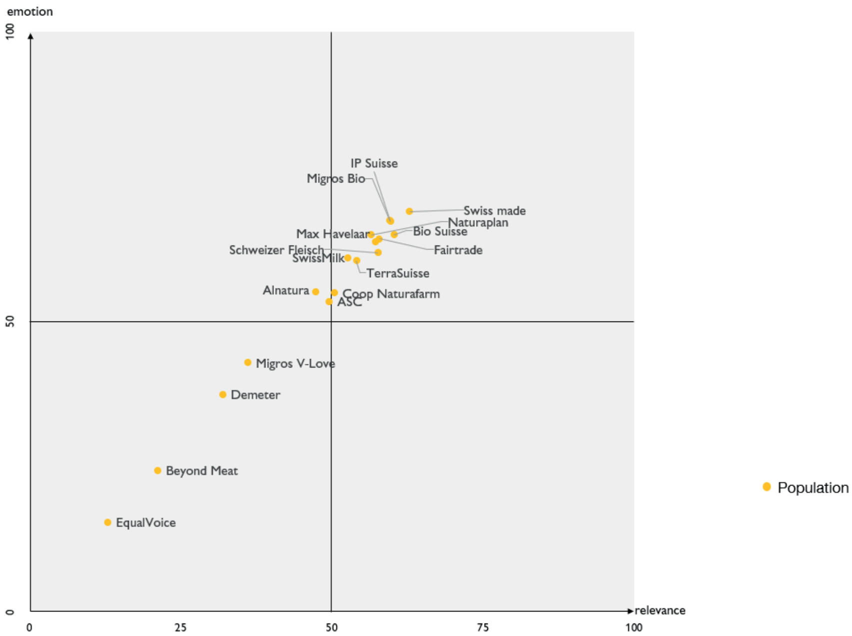
*To be investigated in more detail on a brand by brand basis in follow up research

coop.ch makes a giant leap forward and is the clear new No. 1 in e-commerce

coop.ch is No. 1 in terms of population and IOLs, followed by Galaxus and Digitec. Compared to the previous year, this is a significant jump, especially compared to the competitor Migros Online. It is remarkable what position the brands Galaxus and Digitec have achieved in just a few years: Proof that differentiating, creative advertising with a consistent central idea leads to success.

In general, e-commerce brands are catching up with the strongest retail brands. But Swiss e-commerce should not rest on its laurels: In addition to Ricardo and tutti.ch, Amazon and AliExpress in particular are performing remarkably well in the IOLs, which underlines their future momentum. underlines their future momentum.

Labels – Population



Labels – Young vs. old

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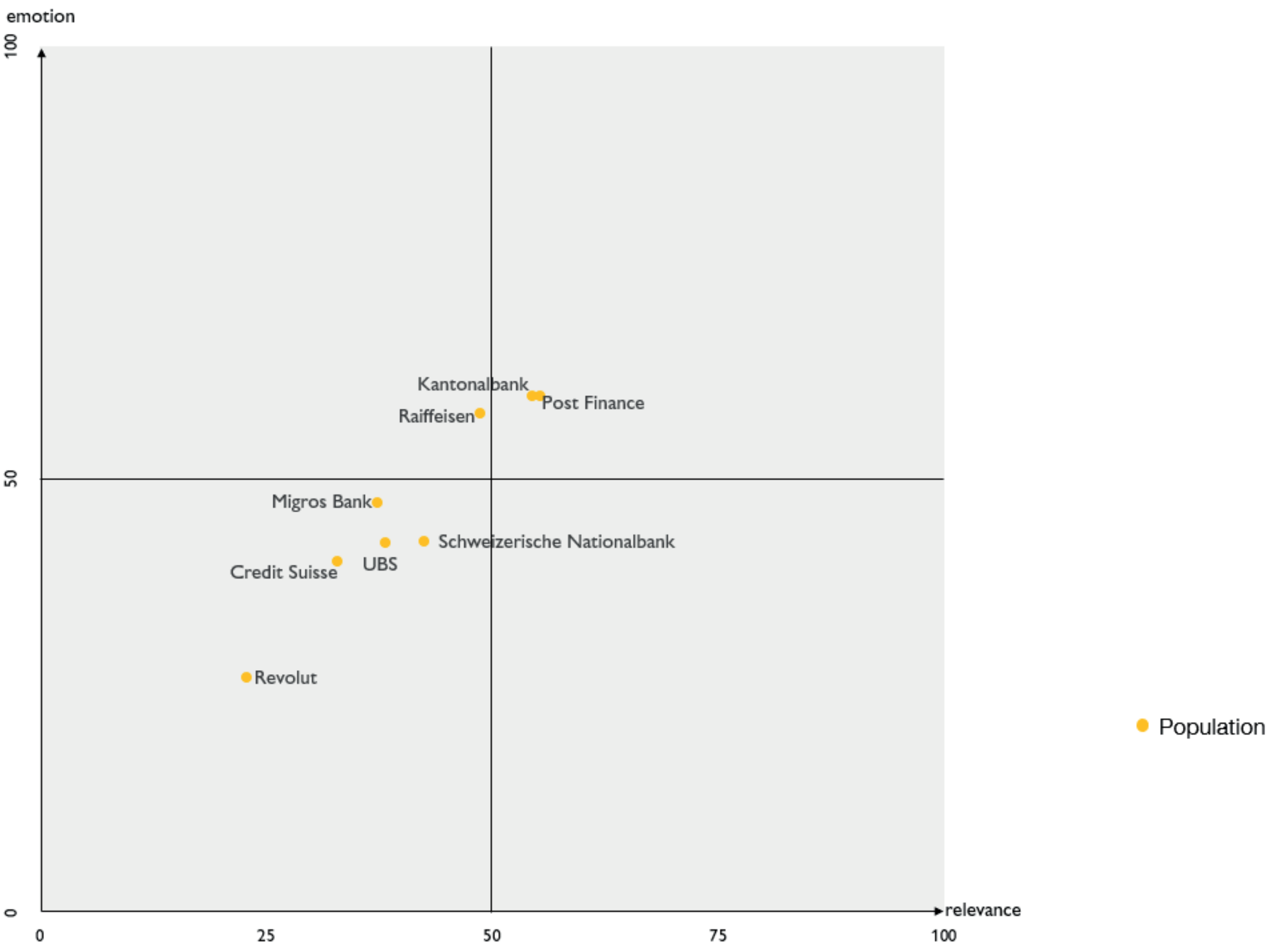
The "Swiss Made" quality label is losing its appeal for the first time in the young segment and among the IOLs

Organic remains in vogue among the population as a whole. This is shown by the excellent scores of IP Suisse, Migros Bio, Bio Suisse, Faitrade, Naturaplan, etc. Even though healthy eating is in vogue, eating habits are changing only slowly: vegetarian and vegan labels such as Beyond Meet, Demeter, V-Love, etc. also score relatively weakly among IOLs and the young and remain a a niche; The average Swiss still enjoys (less health-conscious) brands such as Lindt, Zweifel, Mövenpick, Barilla, Ricola, Emmi, Ovomaltine, etc. (see Food. (see Food).

While "Swiss made" has clearly occupied first place in the overall population for years, the quality label is losing ground for the first time among IOLs and in the young segment. The peculiarity that Swiss people are particularly proud of Switzerland's achievements no longer has the same appeal among young people - a clear indication that the "Swiss made" label urgently needs care and communication and needs to be charged with new values. Of course, the value is and will remain high, but organic labels are becoming more and more relevant and popular.

Banks – Population



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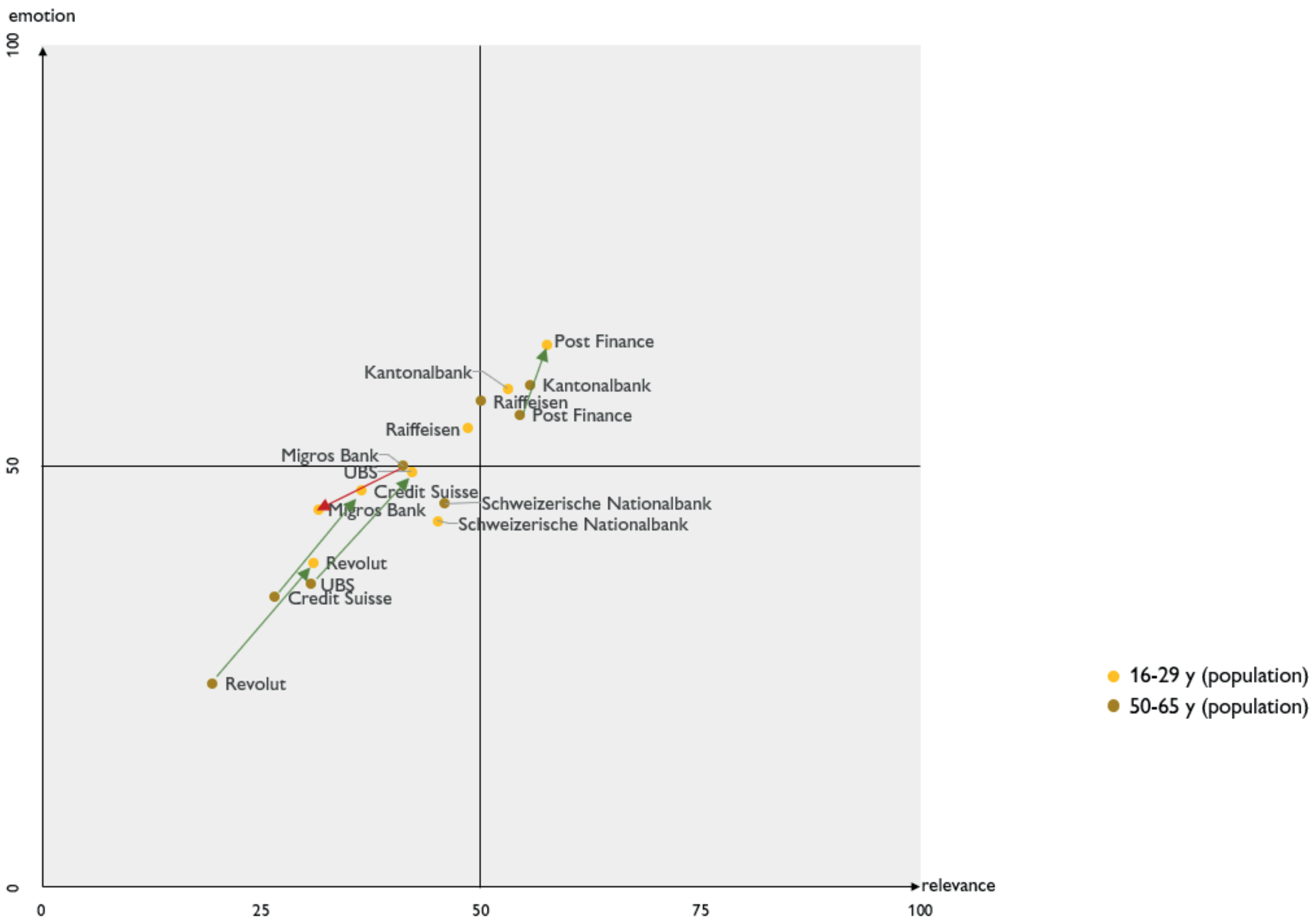
Banks – Young vs. old



A bank that is not originally a bank leads the ranking: PostFinance; in general, the banks are more positive than the headlines, and UBS has excellent future momentum.

The banks are not doing as badly as some headlines; and even Credit Suisse, the last of the Swiss banks, could be expected to do worse. But the fact that a bank that is not originally a bank leaves all banks behind is astonishing: PostFinance leads among the overall population, among the young and among IOLs. Among the under-30s, the banks are generally rated better, with one exception: Migros Bank loses out here, which could also be related to Migros' deteriorating reputation in the young segment (see Retail); UBS in particular does better than average among the young, but so do Credit Suisse and Revolut. Among the IOLs, the future momentum of Revolut and Revolut and UBS are outstanding.

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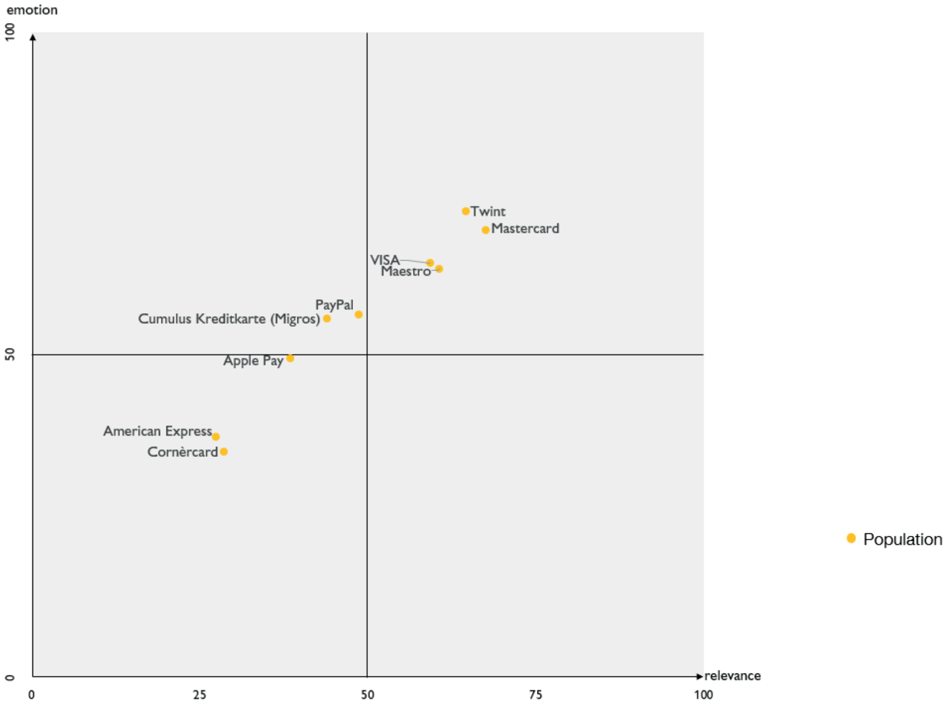
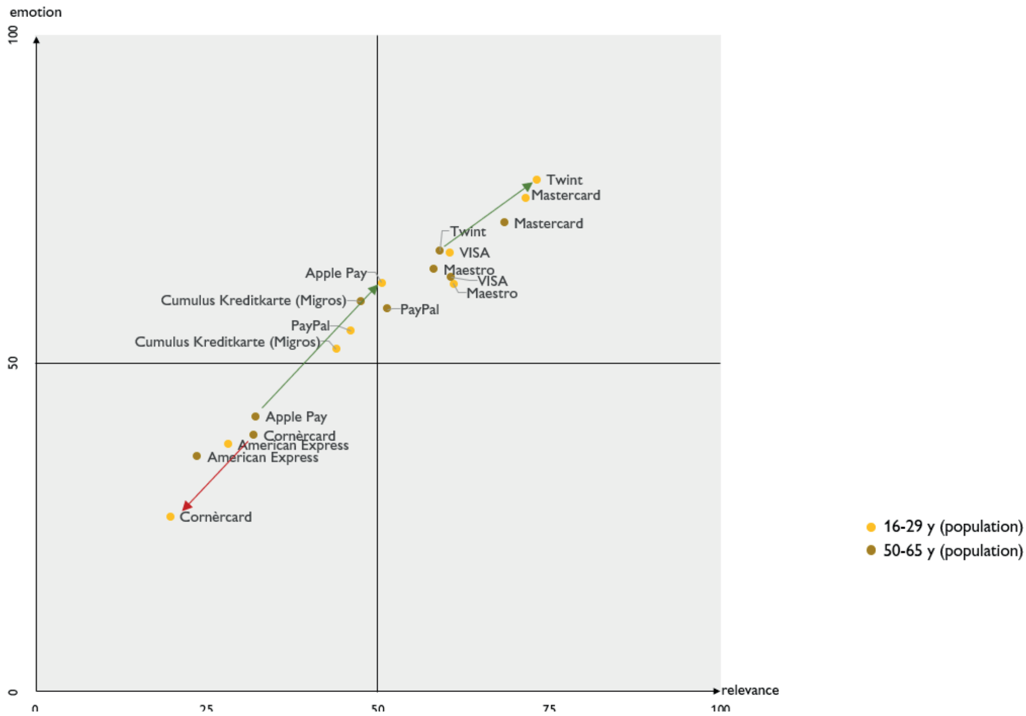
Credit cards & payment systems – Population



Credit cards & payment systems – Young vs. old



Twint and Mastercard pay off

Twint has definitely established itself as the most popular payment method. In the overall population, Twint and Twint and Mastercard share the podium. Visa and Maestro also score very well.

American Express and Cornercard bring up the rear. Among IOLs and in the young segment, Twint is the leading payment method and Apple Pay also scores well here. In general, Cornercard and American Express are rated the worst and could become discontinued models.

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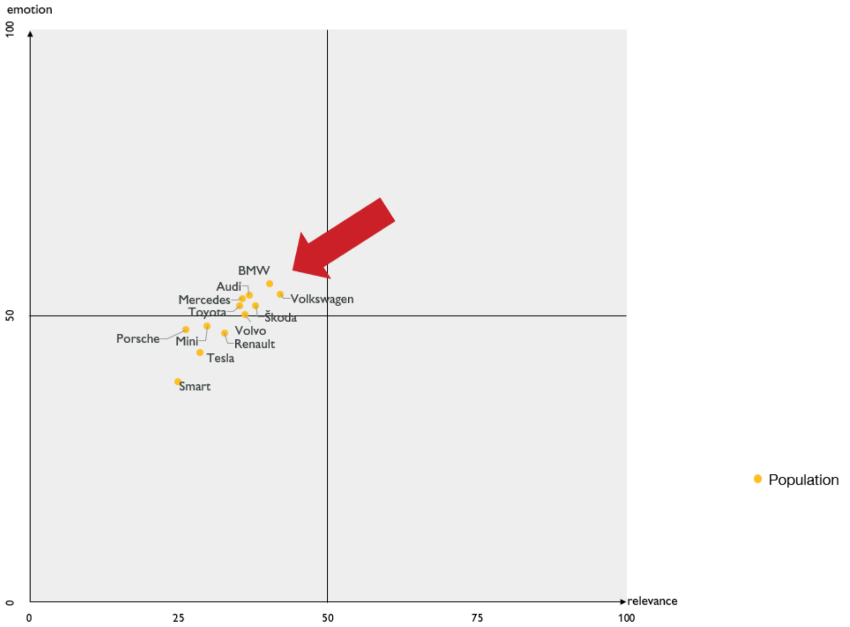
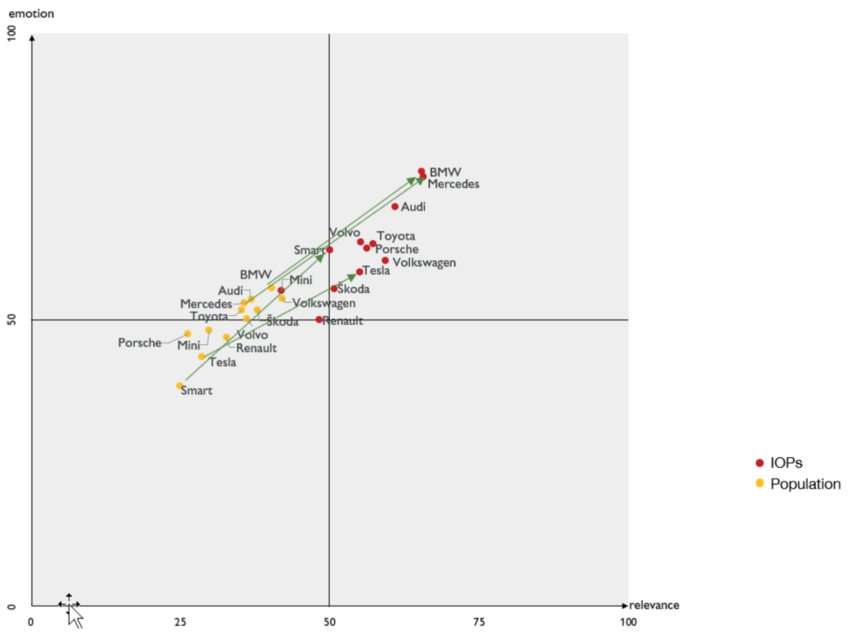
Car brands – Population



Car brands – Future trend



Tesla no longer with the greatest future momentum, but BMW in the fast lane

The trend that car brands in particular are losing relevance continues; while car brands were still among the most popular and strongest brands among the population five years ago, they are losing status year after year, while other mobility offerings such as SBB and Swiss are gaining. Tesla's rapid rise into the top 10 best-selling car brands in Switzerland deserves the greatest respect, but last year's BIS analysis already predicted it: strong, differentiating brands - first and foremost BMW, Audi and Mercedes - also have an excellent position in a transforming market and show great potential for the future; BMW is No. 1 in the overall population as well as among IOLs. BMW and Mercedes as well as Smart have a particularly significant future momentum (IOLs), while this is also very positive for Tesla, but is now smaller compared to its competitors.

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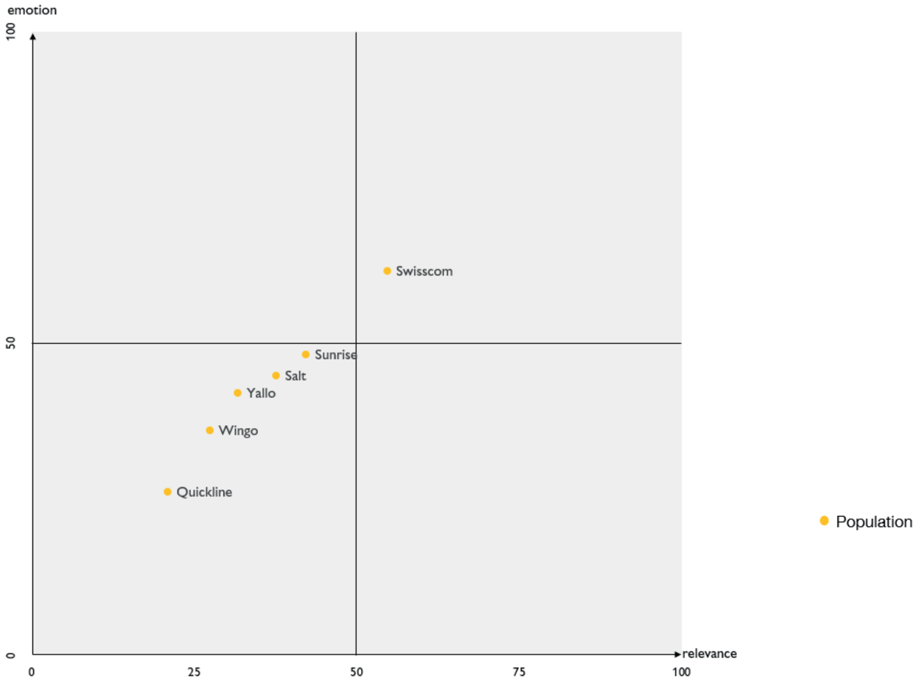
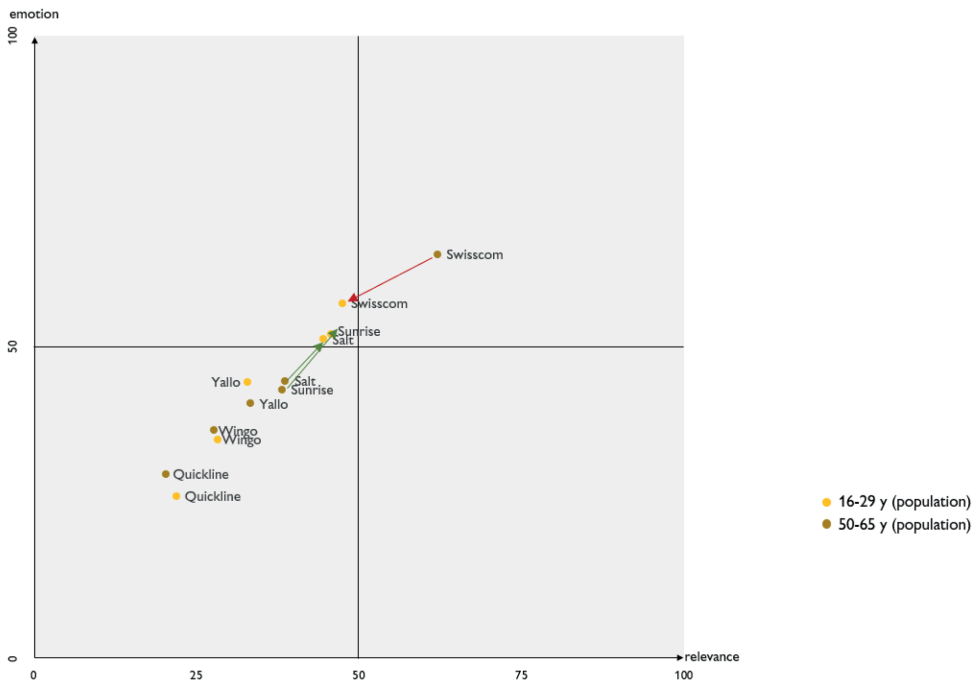
Telecommunications – Population



Telecommunications – Young vs. old



Comment Telecommunications: Swisscom is the clear No. 1, but has a youth weakness

Swisscom may be the undisputed number 1 in the overall population, but the future indicators must give pause for thought: **Among the under-30s, Sunrise is practically on a par with Swisscom** (Sunrise is younger and more urban), which is certainly also related to greater price sensitivity in this segment, but the fact that Swisscom only comes third among the otherwise very brand-conscious IOLs, is remarkable. **The weakness of the youth and the poor future momentum could become dangerous for Swisscom in the future.**

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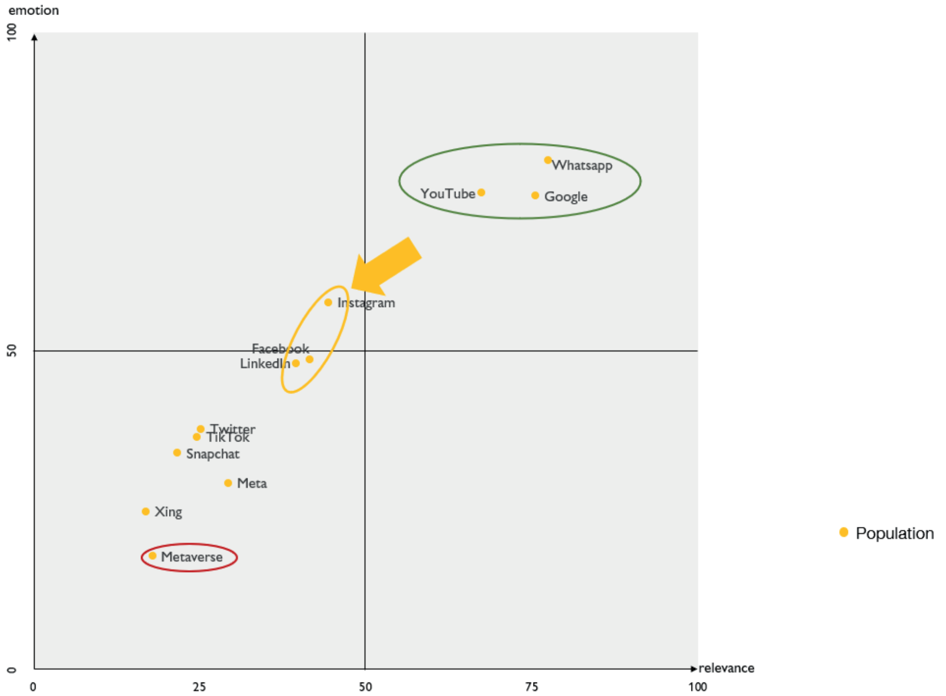
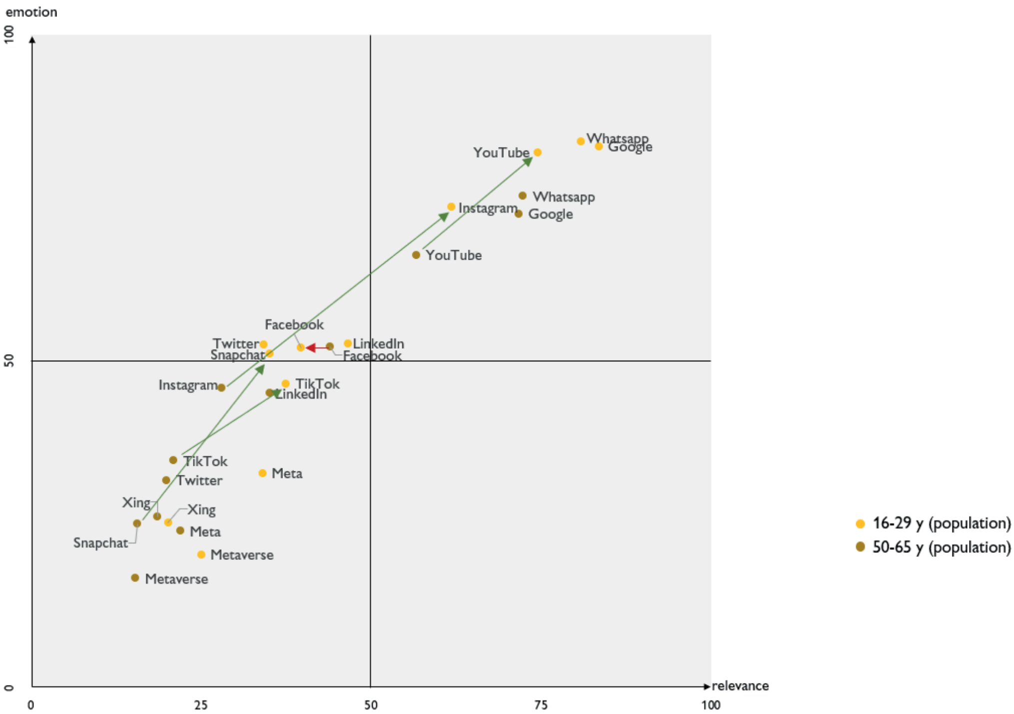
Social Media – Population



Social Media – Young vs. old



Social media scores average among the population - diversification and fragmentation determine the future and the metaverse is still far from any reality

WhatsApp, YouTube and Google are among the big winners of the BIS survey and will continue to be continue to be among the strongest brands in the future.

Among the general population, the hype about social media is very limited: The values of social media platforms are declining and they are joining the ranks of traditional media. In general, the same

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tendency can now be seen with social media as with the media: there are hardly no leading media any more, because more and more media channels naturally lead to fragmentation. In the young target group, where belonging and finding an identity are particularly important, Instagram (in contrast to Facebook) continues to be very important, as well as Snapchat and TikTok.

In terms of IOLs, most social media naturally perform very well, but here too the values are down on previous years and must be put into perspective in this extremely media- and digitally-savvy segment.

The Metaverse is at the bottom of all rankings and even if the IOL scores are better, it seems that the Metaverse is still light years away from any reality.

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4. How you benefit from the study

Looking into the future of your brand with the Brand Indicator Switzerland 2023

A) Presentation (physical or online) and analysis of your brand(s) and sector(s) incl. segmentations (DCH/WCH, city/country, gender, age segments) as well as comparisons to competitors and previous year's development.
B) Survey of additional brands and sub-brands as well as additional specific questions

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