

FULL POTENTIAL REPORT

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SWITZERLAND 2015



*“You can not optimise
what you don’t measure.”*

Outperformance marketing has one goal: to reach the best possible results with a given budget. How to deploy? Where to invest? How to determine a strategy? Full Potential is a tool that analyses competitors, markets and one's own brand. It helps select the best field of operations to implement a budget most efficiently. In the marketing toolbox, Full Potential is like a radar. It is simple to activate and precise; it helps make strategic choices or validate a tactic.

Enigma Lab is proud to present the conclusions of a study of 60 brands. Use it well!



Olivier Perez Kennedy,



Martin Küenzi

Founders of the Enigma Lab

PUBLISHERS

Cominmag
Enigma Lab

EDITORS

Olivier Perez Kennedy
Martin Küenzi

REPORT

Louis Gaillard
Fiona Helle

ANALYSTS

Louis Gaillard
Fiona Helle
Jil Martinez

TRANSLATION

Brigitte Sion

DESIGN

Daniele Catalanotto
Izabela Sobieszek

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BENCHMARK OF 60 BRANDS IN SWITZERLAND



The brands analysed in 2015 score a nice average of 56.6 points out of 100.

Since they are all well-known brands, their high score is quite normal. These brands have significant visibility and impact, which explains their high score. Since the launch of our study in Switzerland, we can observe that these brands stand above the average.

However, some brands do not have a specific strategy for Switzerland, and some particular aspects of the Swiss market are not taken into account.

Our Full Potential study looks at three dimensions: branding, advertising and digital.

Results are generally very good when it comes to branding.

What needs to be improved is the Why. All brands are going through the same revolution, which explains why this aspect needs to be developed. According to Simon Sinek, we buy more today because of the why than because of the product itself.

The result in the field of advertising is the most surprising. Despite more precise studies about neuromarketing, the brands we analysed have not systematically implemented best practices.

The digital aspect scores a good average. We observed that some corporations—Helsana, Migros and Swisscom—have heavily invested in their digital ecosystem.

Let us look at the three dimensions in greater detail:

BRANDING¹

The branding dimension analyses the ways in which a brand takes advantage of current marketing tools. We integrated Simon Sinek's theory, according to which the "why"—the deep *raison d'être* of a brand—is what motivates us most. Some important elements, such as the consistency of a brand on any medium and its history were also analysed.

Our benchmark of about 60 brands shows a good grasp of branding in Switzerland. This category collects most points, with a 64.5 points average out of 100. The brands

¹ — Branding is what belongs to the brand's field related to visual and moral aspects. Therefore, the graphic consistency but also the perception of the story of the brand and her profound motivation are looked over. It also includes what allows to create a relationship with the consumer and the speech's adaptability of the brand towards distinct segments of clients.

included in our study are particularly sharp on the products or services they offer.

They also remain consistent on various media and on various platforms, which makes them easily distinguishable. However, most brands have trouble with storytelling and distinguishing themselves from their product. The Why, or deep motivation for the brand, as well as its history are very difficult to perceive. For Swiss brands, the anchoring in the Swiss context, as well as the link between the brand's history and the country's history enables a strong storytelling. For foreign brands, storytelling often receives more attention and is thus clearer.

ADVERTISING²

We used Sally Hogshead's theory "fascinate" to look include neuromarketing: the seven triggers of fascination and their use in selected advertising.

This aspect is definitely the most challenging for brands, which score 46.6 points out of 100, not even above the average.

The use of neuromarketing brings the score down. Very few brands really use it, since the study shows a score of 3.8 points out of 10 in this category.

There are seven triggers of fascination that help memorizing. These seven triggers can be combined by 2, thus creating archetypes. For a trigger to be recognized, it requires validation from at least 4 sub-categories of that trigger. Most advertisements lack appeal and fascination. Generally speaking, brands struggle to mobilise their customers or prospects; they use too few call-to-actions on their various media. How do you bring people to a store without signage? The advertisements we analysed fall short. They first try to retain the customers' attention, but they don't tell them what to do next.

We have also observed that very few brands use the full potential of digital advertising. Very few add tracking codes on their website. Remarketing tools such as Ad-words or Facebook advertising are barely used.

² — The notion of advertising gathers all advertising formats that enables to get in touch with the consumer. This can be done with the use of fascination triggers in order to memorize the message of the brand and with the use of call-to-actions. Advertising has to be understood here as an ecosystem allowing to reach new targets.

DIGITAL³

We measured engagement, the use of various social networks, speed (and accessibility) of a website from various entry points on a desktop, on a mobile device, as well as the SEO.

With an average of 58 points out of 100, digital platforms are not doing badly. While call-to-actions are not very present in advertising, they are very visible on the digital platforms we analysed. Conversion is easier to understand online, and brands use it profusely: “Sign up!” “Order!” “Contact us!”

However, brands do not take mobile devices enough into account when developing their website; the loading speed is generally too slow. This is quite surprising knowing that Google announced in April 2015 that it would penalize slow mobile websites.

Social media are unevenly used. Facebook ranks first with an interaction score of 6.5 out of 10, way ahead of Twitter (4.3 points) and LinkedIn (4.9 points). Most corporations have a LinkedIn page, but they seldom update it or add new content.

As for Twitter, most brands don't know how to use it. The use of @ and # is complicated and tweets are mostly a brand monologue.

CONCLUSION

The Full Potential study can be read at different levels, depending on the reader's perspective and interest. It can show a global image with visuals that give a quick snapshot, which is useful for an executive. It can also help learn more about the speed of one's website on a mobile device, a crucial aspect for a digital marketing manager. The study offers flexibility when making decisions: The Waterfall Model⁴ is the most commonly used, but it lacks many important things and forces to change everything immediately. Our study enables to use small iterations to adjust to change according to current priorities, cam-

³ — The digital is here used in a wide definition. We include digital platforms from brands such as social media, website... but we go one step further by tacking in consideration the point of view of the user. Social media are therefore a way of dialogue, when the website provides a service and has to meet several criteria (speed, accessibility...).

⁴ — Where each software/project component is developed sequentially and completed before another functionality is programmed

paings, or the evolution of the target market.

If you go beyond the Swiss benchmarking and want to give a different perspective to your study, we have also compared businesses in the same industry. Next, you will find our conclusions by sector.

INDUSTRIES

BENCHMARK FOR THE WATCHMAKING INDUSTRY

BENCHMARK FOR THE WATCHMAKING INDUSTRY

Benchmarking the watchmaking industry shows a very strong branding. Each brand is easily identifiable and has developed a strong and complete story.

This trend is not surprising in this industry, since the brand gives the added value to a product and justifies the selling price.

Cartier is particularly ahead of the game, earning 70 points out of 120. The watchmaking department of the brand has highly developed its story to each client constituency, so that they can easily enter the universe and the history of the brand.

The watchmaking brands we analyzed with this marketing benchmark master advertising well: the brand's identity comes out strong in their communication.

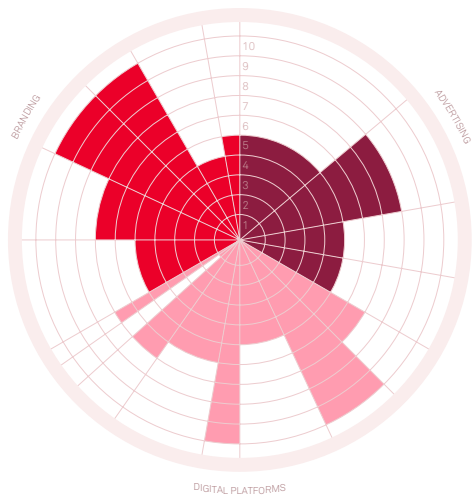
Longines stands out for the quality of its advertising and for its strong use of neuromarketing.

This benchmarking also reveals that all brands in this industry lag behind significantly when it comes to digital aspects. The websites of watchmakers are usually slow; they don't perform well on mobile devices. These companies struggle to build a relationship with fans/followers on social media.

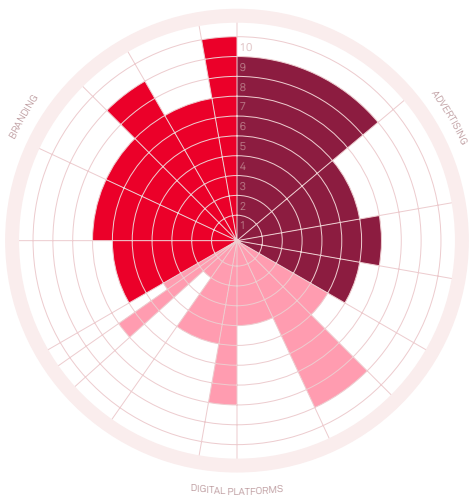
Within this benchmark, Rolex is the brand that has the most digital visibility. However, even as a leader in the watchmaking world from a digital perspective, Rolex remains digitally average in comparison to other industries.

STUDIED BRANDS

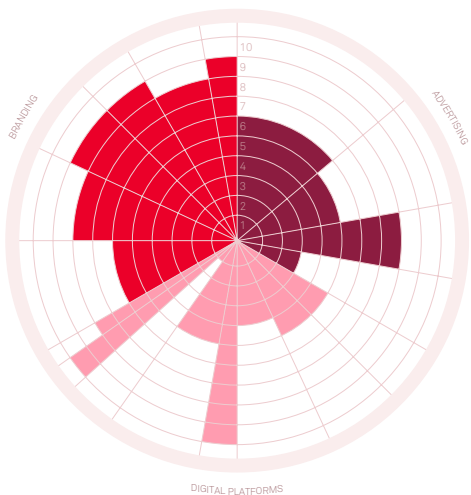




Rolex
64 points



Longines
67 points



Cartier
62 points

BENCHMARK FOR RETAIL

In benchmarking Swiss companies, we have analyzed four companies in the retail business: Coop, Migros, Aldi and Manor.

We have observed that all four brands really try to adapt their story to the various types of customers they interact with. We've also observed that none of them really develops its brand story, with the exception of Migros.

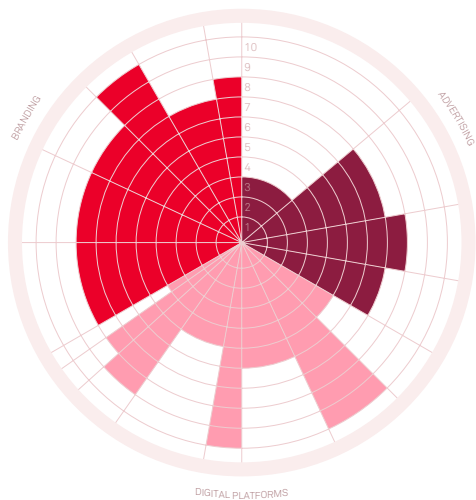
Indeed, Migros is the brand that has developed its storytelling the most, and that uses its branding very consistently. It is also the one brand in retail that knows how to use social media like Facebook or Twitter. One observation surprised us: while we often associate Coop and Migros as direct competitors in the retail market, it looks like Aldi is Migros's most direct competitor. Aldi has invested on a digital environment and has also strongly focused on call-to-actions, both online and in their advertising.

Against these two rivals, Manor and Coop can make strides if they improve their branding and develop their storytelling.

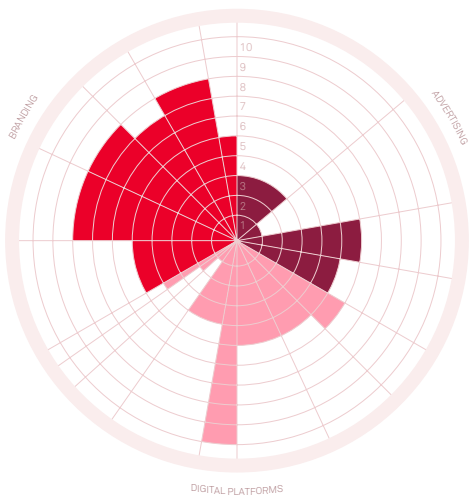
All four companies try hard to personalize and adapt their story to various client constituencies. They've all maintained a good SEO and good referencing, but each of them has neglected Facebook, Twitter and LinkedIn. This is quite surprising since Facebook has become Switzerland's number 1 media.

STUDIED BRANDS

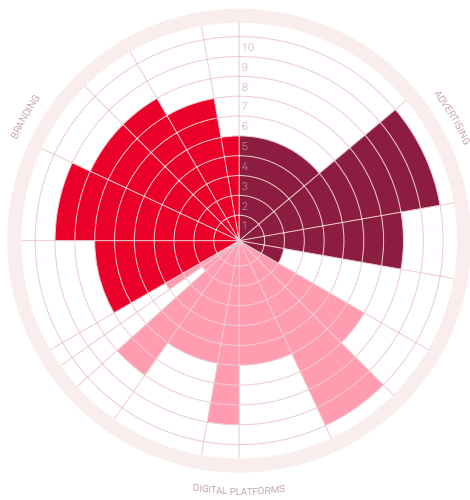
MIGROS**coop****MANOR** 



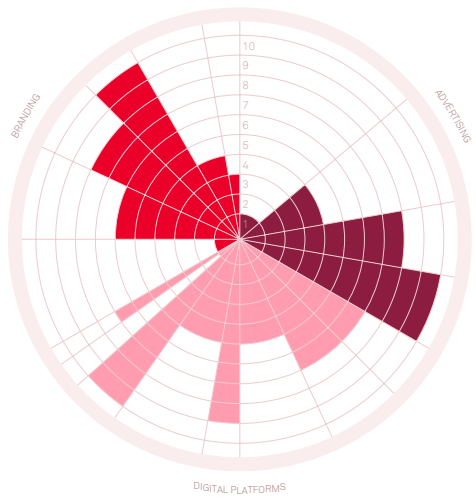
Migros
69 points



Coop
50 points



Aldi
69 points



Manor
52 points

BENCHMARK FOR THE ONLINE RETAIL INDUSTRY

We have selected three online retail companies that are active in Switzerland: Ackermann, La Redoute and Zalando. These brands have prioritized the development of their digital ecosystem.

Ackermann is an interesting case: it does almost no advertising, but its digital ecosystem gives it a strong standing among its competitors. It has invested more on SEO than on social media and thus gets a good ranking in search engines.

La Redoute is very present digitally, but it has also invested in branding and advertising against its competitors. Its online advertising is excellent. However, we've observed that call-to-actions could be stronger for an online retail brand. It looks like La Redoute has all the right tools but needs to use some of them better to increase its ranking.

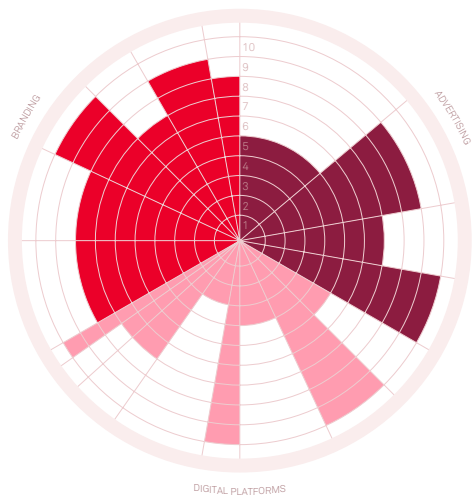
It is not surprising to see Zalando stand ahead in its category. The company has a strong digital presence and uses neuromarketing optimally. It has also developed a strong branding and powerful advertising, for example in its recent billboard advertising campaign.

In this industry, brands generally pay attention to their SEO and have invested in digital advertising and in client differentiation. They have personalized the online retail experience.

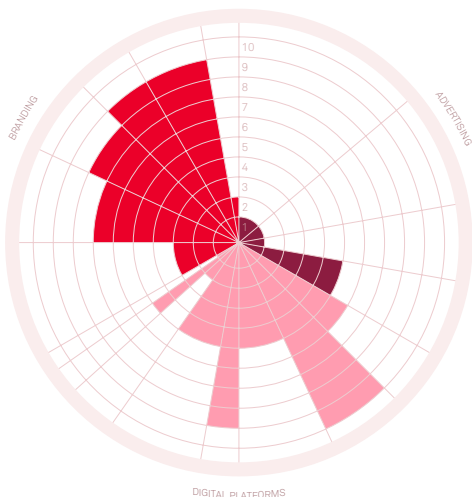
STUDIED BRANDS



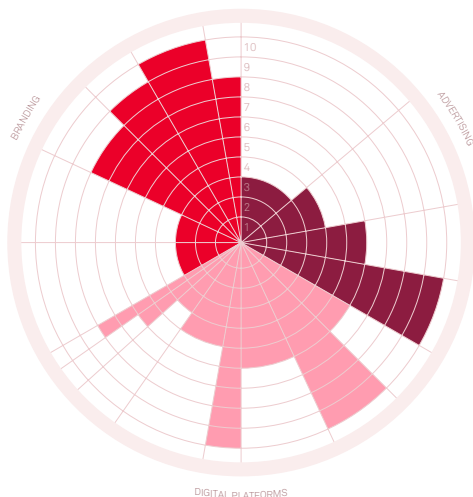
La Redoute



Zalando
72 points



Ackermann
46 points



La Redoute
59 points

BENCHMARK FOR THE INSURANCE INDUSTRY

We studied six Swiss brands in the insurance industry: Assura, Aquilana, Atupri, CSS, Helsana and La Mobilière.

The branding strength in the insurance industry varies quite a bit. Since the numerous services are not always clear to the target audience, a well-built storytelling can be very advantageous.

Assura stands out with a more precise branding that makes the brand and its history more easily understandable to the general public.

Our analysis shows that advertising is a weak point of the industry. However, La Mobilière seems to be ahead of the game with good personalized advertising and the use of digital advertising tools.

Overall, they do not take advantage of digital media. Even if the websites offer a very satisfying user experience, they are relatively slow, especially on mobile devices. One exception is Helsana, which has the largest presence on the Internet and a particularly fast website for desktops.

Generally speaking, all the brands that were included in our analysis of communication in the insurance industry seem to work hard on the description of their activities and their products; this could be completed by a stronger storytelling. Furthermore, they could look into new opportunities for advertising, e.g. with neuromarketing.

STUDIED BRANDS



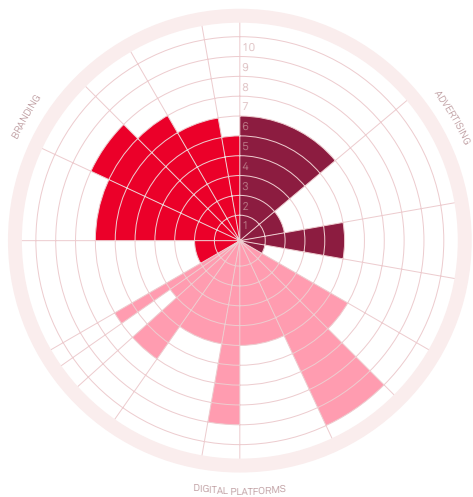
Helsana

ASSURA

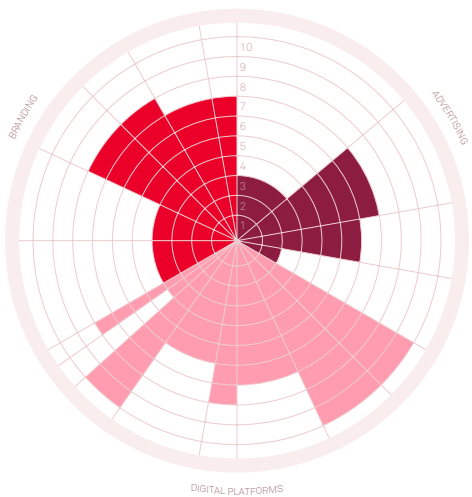
atupri



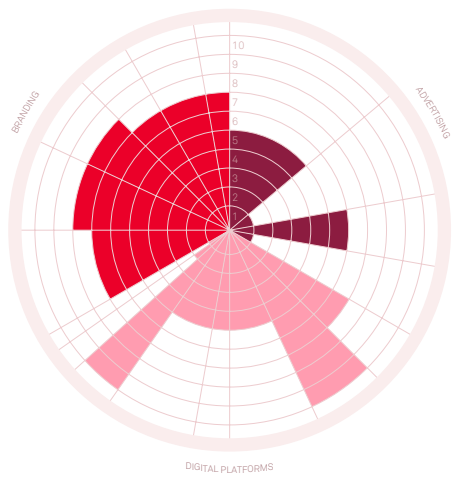
La Mobilière
Assurances & prévoyance



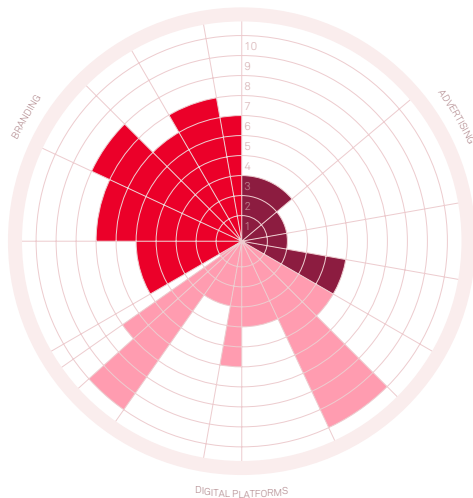
CSS
54 points



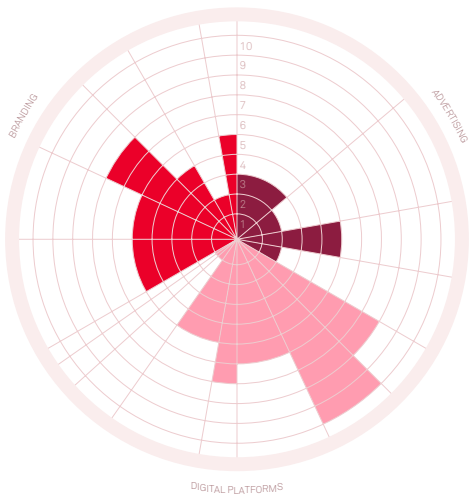
Helsana
61 points



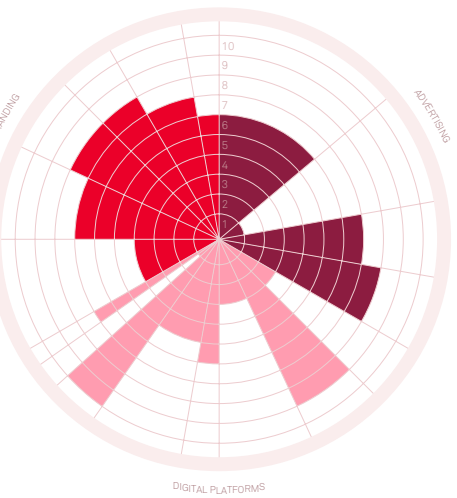
Assura
57 points



Atupri
51 points



Aquilana
45 points



La Mobilière
57 points

BENCHMARK FOR THE BEVERAGE INDUSTRY

We chose the following beverage brands for our analysis: Rivella, Coca Cola, Coca Cola Life, Henniez, Fanta and Cardinal.

In an industry catering to a potentially very large target audience, it is surprising not to see more neuromarketing.

However, Fanta is slightly ahead of its competitors with strong personalized advertising and by using very precise digital advertising and call-to-action tools.

The benchmark study of brands in the beverage industry in Switzerland reveals deep discrepancies in branding.

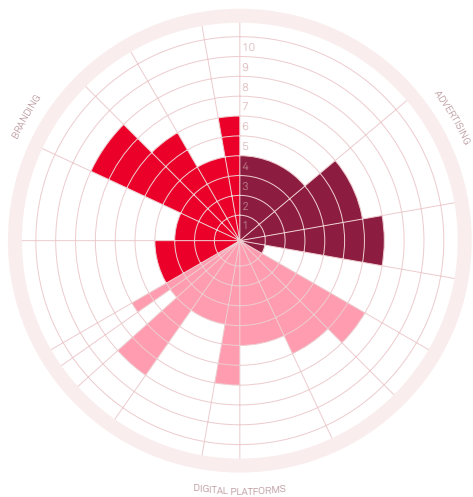
Unsurprisingly, Coca Cola scores 87 points thanks to the clear and consistent history of its brand. Coca Cola Life, a brand that is young and well conceived, but whose segmented storytelling is not clear, logically comes next.

In terms of digital deployment, the analysis of brands in the beverage industry doesn't reveal significant differences among rivals. It is nevertheless interesting to observe that Cardinal ranks first, one point ahead of Rivella. Both brands stand out with the speed of their website when accessed from stationary devices.

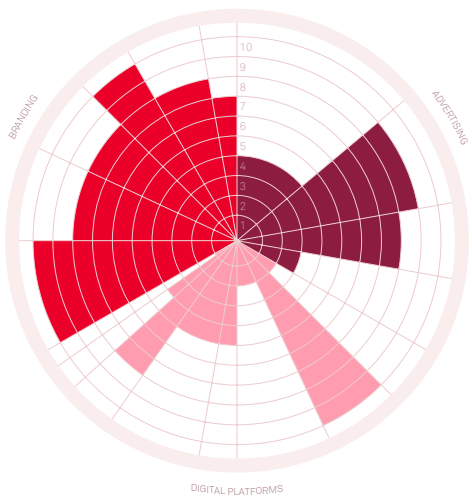
As a general trend, we observed that LinkedIn is not used much, and that effort seems to be made to improve the user experience on websites.

STUDIED BRANDS

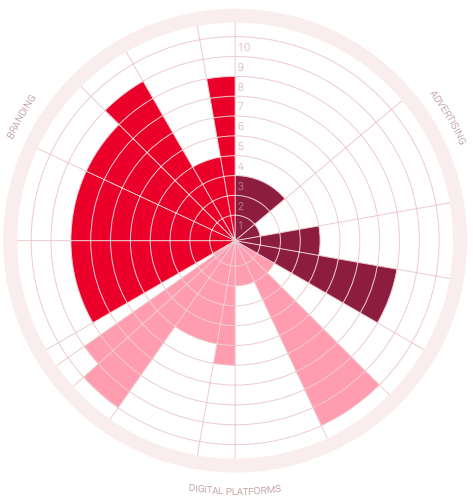




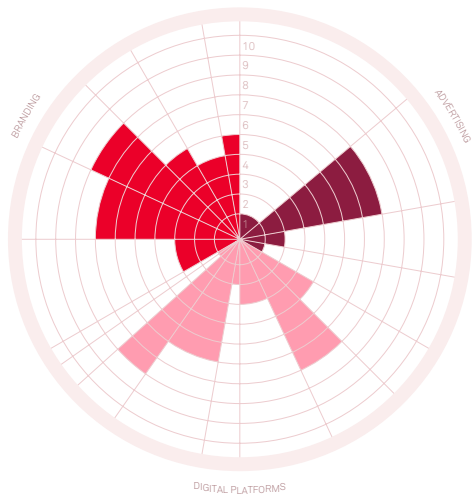
Rivella
50 points



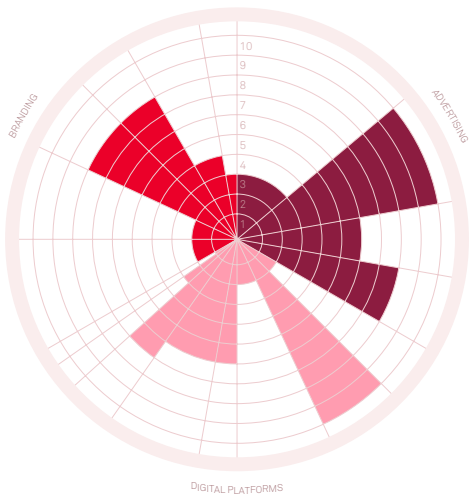
Coca-Cola
65 points



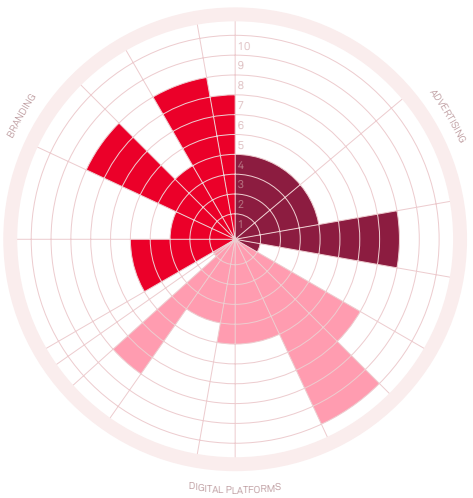
Coca-Cola Life
55 points



Henniez
42 points



Fanta
51 points



Cardinal
52 points

BENCHMARK FOR THE ENERGY INDUSTRY

The benchmark study of the leaders in the energy industry (SIG, Romande Energie and Groupe E) shows a good positioning in brand development, brand advertising and digital platforms. The energy industry in Switzerland is led by brands that differentiate client segments and are considered solid and steady. They also show good results in advertising; all three brands make strong use of personalized and digital Ads tools.

Despite some improvements needed, especially on Twitter, SIG and Romande Energie score well on social media. Groupe E needs to improve in this area. However the fact that the cantons of Fribourg and Neuchâtel are the targets for this company may explain the lower scores on digital platforms.

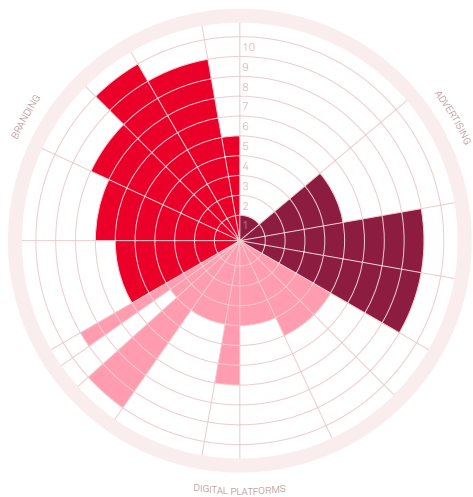
Our benchmark in the energy industry also reveals that none of these brands uses the full potential of advertising deployment, particularly neuromarketing for SIG, incentives for Romande Energie and personalization for Groupe E. However, SIG and Romande Energie have implemented the right tools for digital Ad.

The brands SIG, Romande Energie and Groupe E have show similar results in the three axes of the Full Potential analysis tool. Nevertheless, they should consider new implementations in the digital area, and make their industry more accessible to consumers.

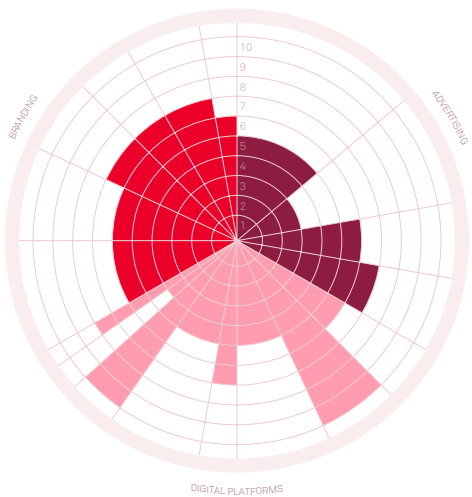
The opening up of the electricity market should encourage corporations in the energy industry to differentiate on the above-mentioned issues, whether for the brand identity or the web presence.

STUDIED BRANDS

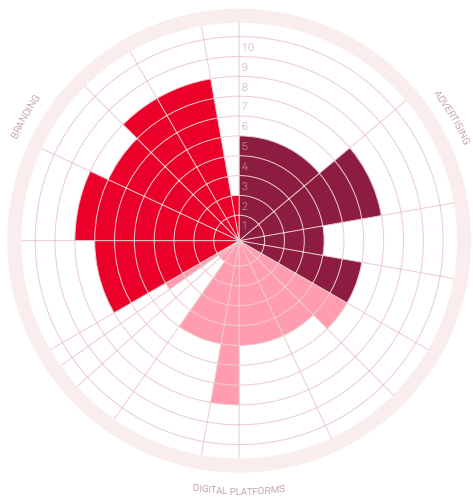




SIG
58 points



Romandie Energie
61 points



Groupe E
58 points

BENCHMARK FOR THE AIRLINE INDUSTRY

We studied the communication of three airlines in Switzerland: EasyJet, Swiss and Air France.

We observed little use of neuromarketing, but all three brands use the Passion trigger in advertising, which is quite typical of communication in the airline industry. EasyJet is more efficient in personalizing its advertising and with its clear call-to-actions. We also observed little use of digital advertising by Swiss and Air France, even though French-speaking Switzerland could be an interesting market.

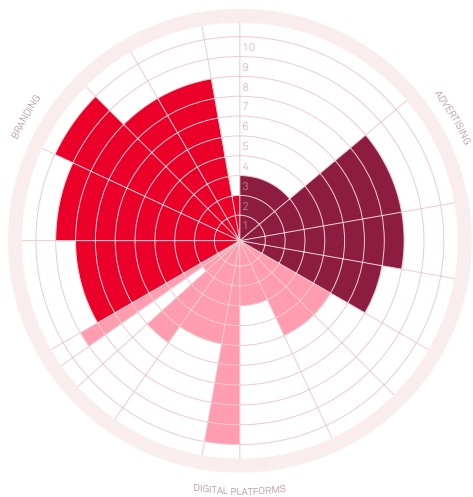
EasyJet's brand history feels a bit heavy sometimes, but the airline scores 80 points in branding thanks to its wide and efficient deployment. With 73 points, Swiss has a well-built story, but its core message is not immediately clear to the public.

Our study of communication in the airline industry shows that the three brands make inconsistent use of digital tools. Swiss has the most developed digital plan, especially with a good interaction rate on Facebook. Air France comes a close second, with a faster and more responsive website.

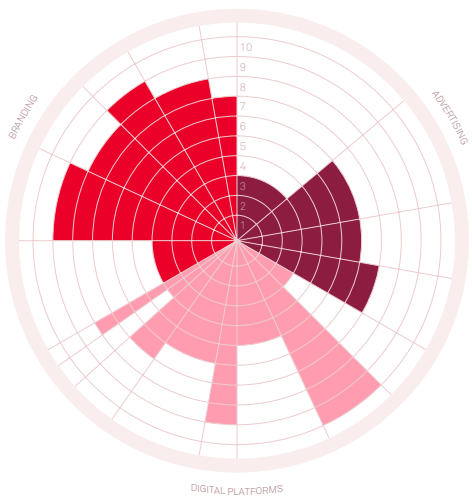
Additionally, we observed a good presence on LinkedIn, unlike other industries that were studied with the Full Potential tool.

STUDIED BRANDS

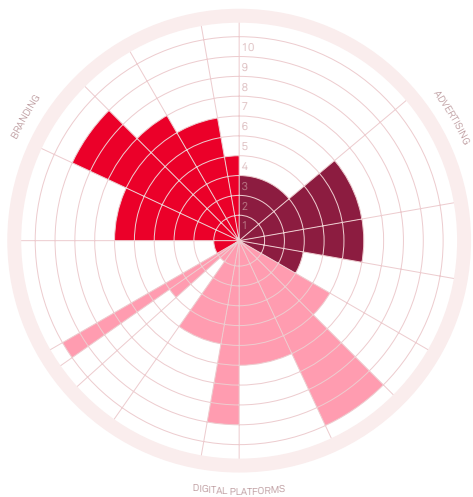
easyJet **SWISS****AIRFRANCE** 



Easyjet
63 points



Swiss
62 points



Airfrance
52 points

BENCHMARK FOR THE NEW TECHNOLOGIES INDUSTRY

We analyzed four brands of technology products: Apple, Microsoft, Samsung and Sony.

Advertising for new technologies varies with every brand or product. Surprisingly, half of the advertisement we analyzed do not use neuromarketing, and the other half has no real digital advertising framework on the Swiss market.

However, Apple stands out with its better driven call-to-actions and a stronger impact in neuromarketing.

In terms of branding, these international corporations active in Switzerland show discrepancies. They all score positively in the segmentation of their storytelling and description of their field; however their motivations and added value are not always clear.

Apple once again stands out from the pack with the best storytelling: clear, consistent, and very cohesive in its visual codes and various communication media. Apple also chooses sleekly presented and accessible information, which explains its high score of 90 percent for branding.

Regarding digital deployment, we have surprising results in new technologies, because they do not differ much from other industries. Scores are very similar, ranging from 58 to 62 points. We observe some websites that are very adapted to user experience, even if they are slower, and call-to-actions on a number of pages.

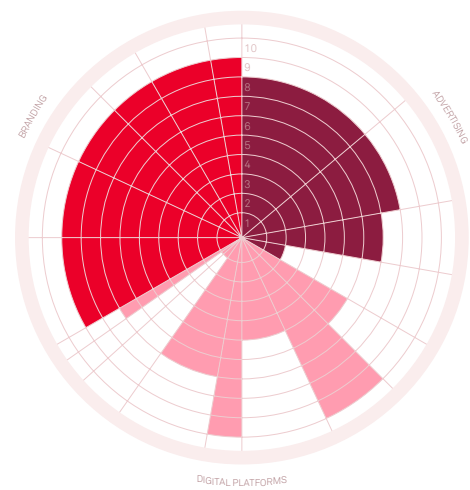
In conclusion, the four giants show uneven results in advertising and branding; Apple leads the pack. The scores lead to think that there is no strategy specific to the Swiss market.

STUDIED BRANDS

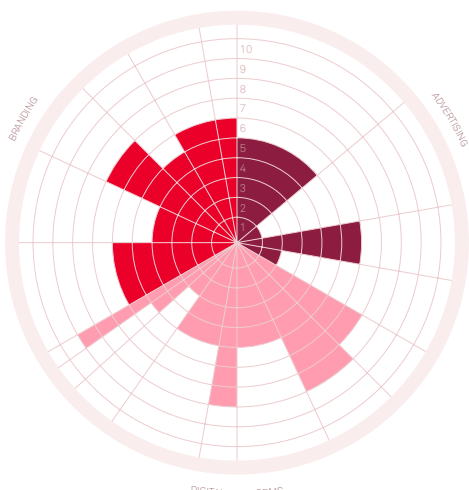


SONY

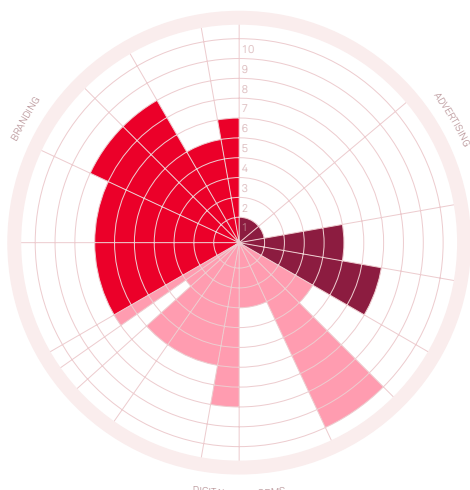




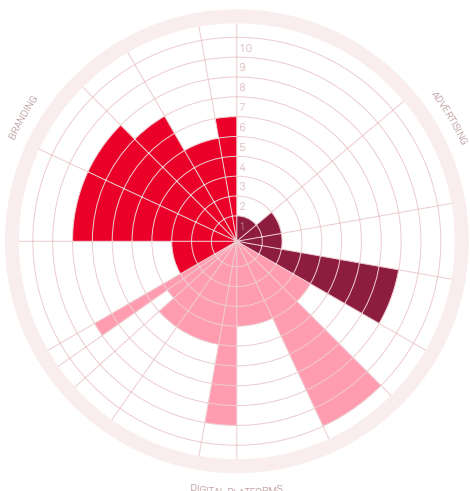
Apple
73 points



Sony
51 points



Samsung
51 points



Microsoft
48 points

BENCHMARK FOR THE AUTOMOBILE INDUSTRY

Our analysis of communication in the automotive industry in Switzerland looks at Volkswagen, Fiat, Peugeot and Audi.

The analysis of their advertising reveals surprising discrepancies. Two automobile makers stand out: Volkswagen and Fiat scored higher, the former for its good digital advertising system, the latter for its well driven call-to-actions.

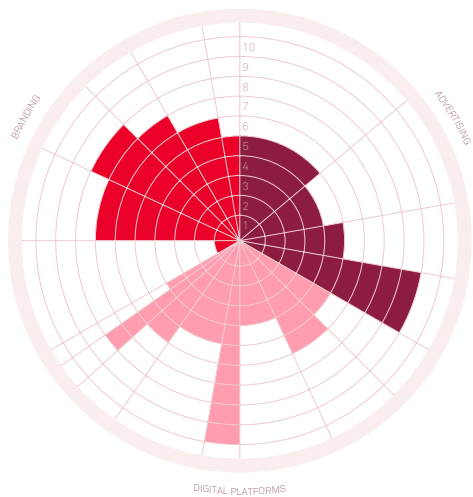
All brands in the automobile industry are behind in their storytelling. The history of the brand is not fleshed out and remains focused on products. Audi is slightly above the others, but it could improve its storytelling, especially the motivation that drives the brand.

In terms of digital deployment, Peugeot and Fiat both scored 63 for mastering at least one social network and for rather responsive websites. VW and Audi have slow websites that are not adapted to the user experience; this is surprising because it is a relatively rare occurrence among all the brands analyzed with our Full Potential tool.

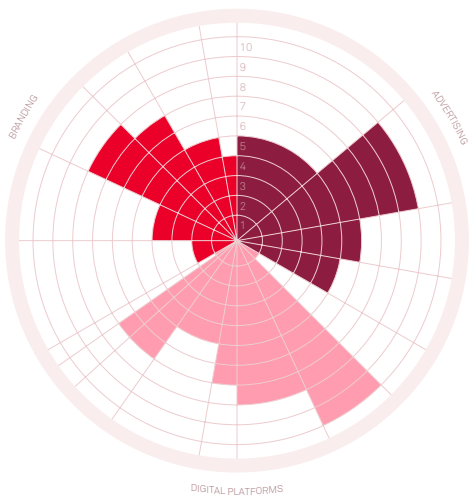
Generally speaking, the four automobile makers have focused on a number of call-to-actions on their websites: their goal is more about selling than about dialogue.

STUDIED BRANDS

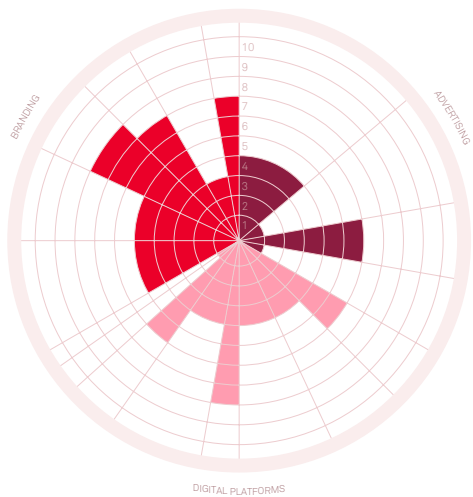




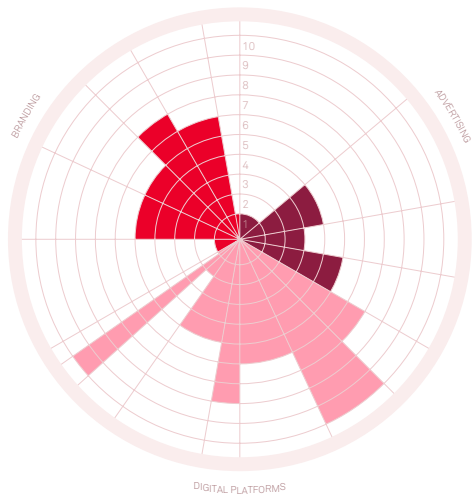
VW
55 points



Fiat
57 points



Audi
44 points



Peugeot
44 points

METHOD OF ANALYSIS

QUALITATIVE BRAND ANALYSIS

The risk is to end up counting fans. We thus wanted to create a qualitative analysis tool.

With 60 control points in three different categories, each question was segmented with precision so that the person attributing points is clearly identified.

AGILE DECISION-MAKING TOOLS

Enigma Lab has created a tool for brand analysis that is an agile decision-making device allowing a strategic focus on three axes: branding, advertising and digital platforms.

With more than 60 control points, this tool can identify the strengths and weaknesses of a brand at a given time, as well as its capacity to expand independently from its investments.

60 BRANDS SELECTED BY COMINMAG

The Full Potential study was conducted in partnership with Cominmag. The magazine selected 60 brands that were Swiss or that had a strong visibility/activity in Switzerland. Enigma Lab analyses them using the Media Focus categories.

ONE AD, ONE BRAND, ONE WEBSITE AND SOCIAL MEDIA

For each brand, we selected an ad that was less than a year old and shown in Switzerland. We also listed their website and their specific social media.

VALIDATION FOR EACH BRAND

Each marketing/communication director could then approve the use of selected ads.

YOUR STUDY

ORDER NOW YOUR FULL POTENTIAL STUDY

Would you like to analyze your brand and the one from your competitors in order to make better strategic decisions?

ASK FOR YOUR STUDY

→ or visit enigmaprod.ch/yourfullpotential

