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Brand Impact Report 2008

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A new way to rate technology brands.

Brand Impact Study:
Liquid Agency and its research partner, Socratic Technologies completed an annual quantitative study of more than 275 technology brands in their respective categories. The study examined a brand's relative strength or impact within a specific category based on how well it retained customers moving across the sales cycle process.

Brand Impact Awards:
The study along with insight by an expert panel formed the basis for the Brand Impact Awards, which were announced at the end of the Liquid Brand Summit on February 26, 2008. Awards were given to the brands that scored highest in each of 22 categories in the B2C segment and 12 categories in the B2B segement. From those, we also announced the top brands in the B2C and B2B segments, and an overall Brand of the Year.

Brand Impact Report:
The Brand Impact Report contains a listing of the Brand Impact Scores for all brands included in the Brand Impact Study. Along wth this, there is a detailed breakdown of the scores for each of the B2C and B2B category winners, comparing of the top three brands in each category. The Brand Impact Report includes Liquid Agency's interpretation of the implications from the data. Additionally, we've included a detailed description of the Brand Impact Study Methodology and a background on all of the Judges on the B2C and B2B Expert Panels.

Methodology overview.

The Brand Impact Score is derived by combining three different metrics into a single score of 0 to 100. The original metrics are rescaled so they can be combined appropriately. The scores are weighted and averaged together to provide an overall Brand Impact Score. Below is a semmary description of the three metrics. For a more complete description of the research and evaluation methodology, please see the Methodology Section at the end of this document.

Brand Power Rating™.
The Brand Power Rating measures the strength of a company's brand through its marketing activities, specifically measuring Awareness, Consideration, Preference, and Purchase Intent (ACPP). The ACPP ranking shows the brand's ability to directly influence those who are aware of the brand and convert them to loyal, repeat customers. At each stage of the sales process, brands tend to lose market share. The ACPP model allows management to identify the precise point at which a brand loses share along the sales process. The Brand Power Rating is the average of the initial total awareness and the conversion rate of those aware who are convert-ed into customers. The model has a normatively high correlation coefficient ($R2 = 0.8623$) with market share. The correlations are even stronger for more niche markets (0.900). Please see page 73 for a complete overview of the Brand Power Rating system, authored by Socratic Technologies.

Brand Reputation.
Brand Reputation is a quantitative assessment of a brand's ability to deliver quality products in the category of interest. Those people who are category users are asked to rate the reputation of brands of which they are aware.

Expert Judges' Score.
Expert Judges' were asked to review the Brand Power Rating and Brand Reputation findings and discuss the category and key brands relevant to that category. Judges' then awarded a first, second, and third place brand within each category based on their knowledge and who they felt had done the best job of positioning their brand within a given category.

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Brand Impact Study:

Summary Overview

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Interesting shifts.

This was the second year of the Brand Impact Study, and we have observed a few interesting shifts from the previous year. For one, the brands that won last year's top honors as Brands of the Year in the B2C and B2B categories were replaced by a completely new set of brands, with Amazon displacing Google as the Overall Brand of the Year.

Additionally, several new brands have emerged that are disrupting their categories by "changing the game" through innovative approaches, and promise continued competition against more established brands for customers' hearts, minds and wallets.

We also noticed that there are a handful of category dominators (B2C and B2B brands that have a lead of 25 points or more over their next closest competitor). This year, the brands that won top honors are all category dominators.

Lastly, this year we added the cable/satellite category which brand reputation scores are so low, that it seems that these brands are ripe to be reinvented in a way that connects with consumers in a more effective manner.

Halo Effect + Marketing Muscle = Results.

We continue to see the power of major technology brands like Microsoft, Apple, and HP whose positive perceptions in one category boost entry awareness in another. When these brands also try to differentiate their product and put marketing muscle behind its promotion – awareness begins to translate into purchase intent and ultimately market share. Microsoft Zune in the Media Players Category provides an interesting example.

Last year, Zune was new to the category and ranked third behind Apple's iPod and Creative Labs Zen, which was barely ahead of iRiver. At the time, the panel of expert Judges' predicted Microsoft's initial halo would fade and they expected that the Zune's Brand Impact ranking would plummet. Instead, Zune pulled off one of the bigger surprises in this year's Brand Impact Report.

With a redesigned product, aggressive pricing, and a big marketing push, Zune leapfrogged many in the category and now sits as a strong No. 2 behind iPod. iPod is still the Brand Impact winner with a 30 point lead over Zune, but for a brand pronounced near death, Zune made a strong comeback - amazing the Judges' and some second-tier category players.

Changing the 'Game'.

Last year the gaming console sector generated a lot of discussion due to the just-launched Wii. Speculation focused on how much impact the Wii would have and what it would do to PlayStation and Xbox. A year later, the buzz for Wii has brought it to the point where its brand impact is equal to Xbox. Even more impressive, the Wii has managed to halve the gap between it and PlayStation.

Brands matter - standing out in a commodity sector.

One of the larger categories evaluated in the research study this year is called "Auxiliary Devices." This category contains 16 different brands of PC accessories such as mice, speakers, and keyboards. Most would consider this a commodity category – one driven by price with little product differentiation. It's also a category where big players like Dell or Microsoft participate as a sideline.

The standout, however, is a pure-play brand with a strong brand identity and retail presence: Logitech. Logitech owns the category with its boldly designed products and smart retail packaging and promotion. Unlike many of the bland brands in this commodity space, Logitech is the brand with personality, a loyal customer base, and the Brand Impact score to prove it.

Rookies of the Year.

One of the wonderful things about technology is how quickly it can change both our lives as well as the competitive brandscape. This year two amazing brands were introduced, and we're recognizing them as "Rookies of the Year": Apple's iPhone and Kodak's Ink Jet Printer.

It comes as no surprise that Apple's iPhone is a Rookie of the Year. We evaluated the iPhone brand in both the consumer and business smart phone categories. Most agree that the iPhone was probably the most anticipated consumer product in a decade. Still, the fact that the iPhone skyrocketed its way to No. 1 in Brand Impact with the consumer segment (in less than six months) - and its impressive showing with business decision makers - should make all technology brand marketers sit up and take notice. Our Judges' called it a "game-changing device" that will blur the distinction between consumer and business technology. Many anticipate an even stronger Brand Impact rating next year if the iPhone overcomes its enterprise e-mail shortcomings.

Kodak entered the consumer ink jet printer market in 2007. The printer category has been dominated by HP, a brand that is practically synonymous with printers. Yet, despite the tough competition, Kodak fared well in its first

year, partly due to its big brand halo and its very competitive ink cartridge pricing (approximately half the price of HP's). It will be interesting to see if Kodak, a much loved legacy brand, can give brands like Canon and Lexmark a run for their money. Our Judges' predict a big battle in this category, especially as the digital camera and photography segments continue to grow.

The Brands we Love to Hate.
A new category was added to the Brand Impact Report this year: the Cable/Satellite category. This category is dominated by big name brands and advertisers – Comcast, DirecTV, TimeWarner, EchoStar/Dish Network and more. What stood out in this group was not any brand's Brand Impact score – but rather every brand's low reputation score. Cable and Satellite Service Providers had the lowest Brand Reputation scores of any other category studied. We all like to hate our cable company; it's kind of a national pastime. But for those in the branding-building business, it represents a huge opportunity to reshape a brand to connect with its customers. Our Judges' think there's never been a more opportune time for a category shakeup, with a new technology (IPTV - Internet Protocol Television) poised to enter this space.

Brands of the Year:

B2C, B2B and Overall

Top Winners 2008.

The Overall Brand of the Year is awarded to the single brand that has the highest Brand Impact Score of all brands measured in this year's study. The Brand Impact Score is derived by combining three different metrics into a single score of 0 to 100. This year several well known brands vied for the honor. But in the end, the Brand of the Year is Amazon with highest score of all B2B or B2C brands surveyed.

Top Brand Impact Scores

Amazon	Internet - Pure Play Shopping	0.937
Google	Internet - Search Engines	0.926
Adobe	Multimedia, Graphics, & Publishing Software	0.905
HP	Printers	0.879
Intel	Semiconductors	0.876
VeriSign	Transaction Security	0.876

B2C Brand of the Year

amazon.com

B2B Brand of the Year

Adobe

Overall Brand of the Year

amazon.com

liquid

Brand Impact Scores:
All Categories

Brand		Category	Brand Impact Score
1.	Amazon	Internet - Pure Play Shopping	0.937
2.	Google	Internet - Search Engines	0.926
3.	Adobe	Multimedia, Graphics,, & Publishing Software	0.905
4.	HP	Printers	0.879
5.	Intel	Semiconductors	0.876
5.	VeriSign	Transaction Security	0.876
7.	Apple iPod	Media Player	0.872
8.	Motorola	Bluetooth Headsets	0.864
9.	Sony	Home Theatre	0.863
10.	Garmin	GPS	0.862
11.	Cisco	Networking Devices	0.856
12.	Sony	HDTV	0.849
13.	RIM Blackberry	Smartphone Business	0.846
14.	MySpace	Internet - Social Networking	0.838
15.	Linksys	Wireless Networking Devices	0.833
15.	Motorola	Mobile Phone	0.833
17.	Symantec	Security Software	0.828
18.	Dell	Servers	0.827
19.	Microsoft	Enterprise Infrastructure Software	0.811
20.	Oracle (Siebel)	CRM Software	0.808
21.	Electronic Arts	Video Game Publishers	0.802
22.	Logitech	Auxiliary Devices	0.799
22.	Microsoft Live Meeting	Conferencing Solutions	0.789
24.	ESPN.com	Internet - Sports	0.772
25.	CNN	Internet - News and Information	0.763
26.	Nintendo DS	Gaming Handhelds	0.754
27.	Sony PlayStation 3	Gaming Consoles	0.751
28.	Sony PSP	Gaming Handhelds	0.745
29.	HP/Compaq	Computers	0.735
30.	Apple iPhone	Smartphone - Consumer	0.734

Brand		Category	Brand Impact Score
31.	Dell	Computers	0.723
32.	Nintendo Wii	Gaming Consoles	0.722
33.	AT&T/Cingular	Wireless Carrier	0.704
34.	Western Digital	External Hard Drive	0.703
35.	Advanced Micro Devices	Semiconductors	0.694
36.	Microsoft	Auxiliary Devices	0.692
37.	HP	Servers	0.691
38.	eBay	Internet - Pure Play Shopping	0.689
39.	Microsoft	Multimedia, Graphics, & Publishing Software	0.684
40.	Panasonic	Home Theatre	0.680
41.	Verizon	Wireless Carrier	0.679
42.	IBM	Enterprise Storage	0.671
42.	Microsoft Virtual Server	Virtualization Software	0.671
42.	Nokia	Mobile Phone	0.671
45.	Microsoft	CRM Software	0.670
46.	McAfee	Security Software	0.667
47.	Microsoft	Video Game Publishers	0.662
47.	Microsoft Xbox 360	Gaming Consoles	0.662
49.	Magellan	GPS	0.658
50.	DirecTV	Cable / Satellite Network Systems	0.653
51.	Yahoo	Internet - Search Engines	0.651
52.	VMWare	Virtualization Software	0.639
53.	Dell	External Hard Drive	0.629
54.	IBM	Servers	0.627
55.	Comcast	Cable / Satellite Network Systems	0.626
56.	IBM	Enterprise Infrastructure Software	0.618
56.	Nintendo Gameboy	Gaming Handhelds	0.618
58.	HP	Enterprise Storage	0.617
59.	WebEx	Conferencing Solutions	0.612
60.	Seagate/Maxtor	External Hard Drive	0.608

Brand		Category	Brand Impact Score
61.	HP	Enterprise Infrastructure Software	0.599
62.	Facebook	Internet - Social Networking	0.596
63.	Sony	Video Game Publishers	0.594
64.	Panasonic	HDTV	0.591
65.	HP	Auxiliary Devices	0.585
66.	Netgear	Wireless Networking Devices	0.583
67.	Pioneer	Home Theatre	0.573
68.	SAP	CRM Software	0.570
69.	Microsoft Zune	Media Player	0.569
70.	Novell	Virtualization Software	0.566
71.	HP	Networking Devices	0.556
72.	RIM Blackberry	Smartphone - Consumer	0.555
73.	Dell	Enterprise Storage	0.553
74.	MSNBC	Internet - News and Information	0.551
75.	Adobe Breeze/Connect	Conferencing Solutions	0.546
76.	Motorola Q	Smartphone Business	0.541
77.	Weather.com	Internet - News and Information	0.540
78.	NFL.com	Internet - Sports	0.531
78.	Palm Treo	Smartphone Business	0.531
80.	Motorola Q	Smartphone - Consumer	0.527
81.	Epson	Printers	0.526
81.	Sega	Video Game Publishers	0.526
83.	Samsung	Mobile Phone	0.524
83.	Nokia	Bluetooth Headsets	0.524
83.	YouTube	Internet - Social Networking	0.524
86.	Samsung	HDTV	0.519
87.	Sports.Yahoo.com	Internet - Sports	0.513
87.	Texas Instruments	Semiconductors	0.513
89.	Apple	Computers	0.511
90.	Overstock	Internet - Pure Play Shopping	0.506

Brand		Category	Brand Impact Score
91.	Gateway/Acer	Computers	0.499
92.	Oracle	Enterprise Infrastructure Software	0.497
93.	Apple iPhone	Smartphone Business	0.495
94.	Samsung	Bluetooth Headsets	0.492
95.	MSN	Internet - Search Engines	0.482
96.	Nokia E61/N95	Smartphone Business	0.481
96.	TomTom	GPS	0.481
98.	Sharp	HDTV	0.479
99.	Canon	Printers	0.475
100.	Sun Solaris	Virtualization Software	0.473
101.	EMC	Enterprise Storage	0.471
102.	Fujitsu	External Hard Drive	0.470
103.	Time Warner Cable	Cable / Satellite Network Systems	0.467
104.	Activision	Video Game Publishers	0.464
105.	Lexmark	Printers	0.463
106.	Microsoft	Security Software	0.461
107.	Corel	Multimedia, Graphics,, & Publishing Software	0.457
108.	Cisco	Enterprise Infrastructure Software	0.453
109.	Salesforce.com	CRM Software	0.451
110.	D-Link	Wireless Networking Devices	0.448
110.	Sony Mylo / Walkman	Media Player	0.448
110.	Sony	Auxiliary Devices	0.448
113.	Juniper Networks	Networking Devices	0.438
114.	T-Mobile	Wireless Carrier	0.437
115.	Philips	Home Theatre	0.435
116.	JVC	Home Theatre	0.433
117.	Nortel Networks	Networking Devices	0.429
117.	Yahoo News	Internet - News and Information	0.429
119.	Open SSL	Transaction Security	0.428
120.	Atari	Video Game Publishers	0.427

Brand	Category	Brand Impact Score
121. IBM	Auxiliary Devices	0.426
122. Apple	Multimedia, Graphics, & Publishing Software	0.423
123. LG	Mobile Phone	0.417
124. Samsung	Home Theatre	0.413
125. Philips	HDTV	0.411
126. Palm Treo	Smartphone - Consumer	0.410
127. Trend Micro	Security Software	0.406
128. MSN	Internet - News and Information	0.398
129. Samsung BlackJack	Smartphone Business	0.395
130. Sandisk Sansa	Media Player	0.392
131. HP iPaq	Smartphone Business	0.389
132. Google News	Internet - News and Information	0.387
133. Netscape	Transaction Security	0.386
134. Fox News	Internet - News and Information	0.385
135. Sony	Computers	0.384
135. Konami	Video Game Publishers	0.384
137. Dell	Enterprise Infrastructure Software	0.381
138. LG	HDTV	0.378
139. IDY	Semiconductors	0.375
140. ASK.com	Internet - Search Engines	0.374
141. Apple	Auxiliary Devices	0.371
142. MSN.Foxports.com	Internet - Sports	0.368
142. Veritas / Symantec	Enterprise Infrastructure Software	0.368
144. Sun	Enterprise Storage	0.367
145. Cisco	Security Software	0.366
146. Sony Ericsson	Mobile Phone	0.364
146. Vivendi Games	Video Game Publishers	0.364
148. Marvell	Semiconductors	0.363
148. Red Hat	Virtualization Software	0.363
148. Samsung BlackJack	Smartphone - Consumer	0.363

Brand	Category	Brand Impact Score
148. Sun	Servers	0.363
152. Kodak	Printers	0.362
153. Sprint	Wireless Carrier	0.360
153. Ubisoft	Video Game Publishers	0.360
155. Quark	Multimedia, Graphics, & Publishing Software	0.358
156. Netflix	Internet - Pure Play Shopping	0.357
157. Hitachi	HDTV	0.356
158. Plantronics	Bluetooth Headsets	0.355
158. New York Times	Internet - News and Information	0.355
160. Broadcom	Semiconductors	0.353
160. CBS.Sportsline	Internet - Sports	0.353
162. Frescale	Semiconductors	0.350
163. RSA Security	Transaction Security	0.350
164. Belkin	Wireless Networking Devices	0.349
165. Jabra	Bluetooth Headsets	0.348
165. JVC	HDTV	0.348
167. iTunes	Internet - Pure Play Shopping	0.347
168. Buy.com	Internet - Pure Play Shopping	0.346
169. My Yahoo	Internet - News and Information	0.346
170. Samsung Electronics	Semiconductors	0.346
171. Harmon Kardon	Home Theatre	0.345
172. Nokia E61 / N95	Smartphone - Consumer	0.344
173. Rockstar	Video Game Publishers	0.343
174. MLB.COM	Internet - Sports	0.339
175. Take Two Interactive	Video Game Publishers	0.338
176. LSI	Semiconductors	0.337
177. Brother	Printers	0.335
177. Creative Labs Zen	Media Player	0.335
177. Sony Ericsson	Bluetooth Headsets	0.335
180. PolyCom	Conferencing Solutions	0.334

Brand	Category	Brand Impact Score
181. T-Mobile Sidekick	Smartphone - Consumer	0.333
182. Sage Software	CRM Software	0.329
183. Hyperion (Oracle)	Enterprise Infrastructure Software	0.328
184. EchoStar/Dish Network	Cable / Satellite Network Systems	0.327
185. Wikipedia	Internet - News and Information	0.326
186. USA Today	Internet - News and Information	0.325
187. Entrust	Transaction Security	0.323
188. BBC News	Internet - News and Information	0.319
189. Belkin	Auxiliary Devices	0.318
190. JBL	Home Theatre	0.317
191. Creative Technologies	Auxiliary Devices	0.315
192. Toshiba	Computers	0.314
193. Craigslist	Internet - Pure Play Shopping	0.313
193. Philips	Auxiliary Devices	0.313
193. Wall Street Journal	Internet - News and Information	0.313
196. Bungie Studios	Video Game Publishers	0.309
196. Iomega StorCenter	External Hard Drive	0.307
196. Reuters	Internet - News and Information	0.307
196. Yahoo! 360	Internet - Social Networking	0.307
200. Sega Gamegear	Gaming Handhelds	0.304
201. Avaya	Networking Devices	0.302
202. HP iPaq	Smartphone - Consumer	0.301
203. Altec Lansing	Auxiliary Devices	0.300
203. IBM	Security Software	0.300
205. Dell	HDTV	0.296
205. Netsuite	CRM Software	0.296
207. Cypress Semiconductor	Semiconductors	0.292
207. Fujitsu	Enterprise Storage	0.292
209. Hitachi Data Systems	Enterprise Storage	0.291
209. NBA.COM	Internet - Sports	0.288

Brand	Category	Brand Impact Score
211. HP	HDTV	0.286
212. Vizio	HDTV	0.285
213. Frontrange Solutions	CRM Software	0.283
214. 3Com	Wireless Networking Devices	0.274
215. Apple Airport	Wireless Networking Devices	0.272
215. Codemaster	Video Game Publishers	0.272
215. NHL.COM	Internet - Sports	0.272
218. Raindance Communications	Conferencing Solutions	0.271
219. CA	Security Software	0.270
220. CA	Enterprise Infrastructure Software	0.269
221. NEC/Mitsubishi	Auxiliary Devices	0.269
222. Blogger	Internet - Social Networking	0.266
222. JBL	Auxiliary Devices	0.266
224. Hitachi Data Storage	External Hard Drive	0.264
225. Xensource	Virtualization Software	0.262
226. Helio Ocean / Fin	Smartphone - Consumer	0.260
227. AOL	Internet - Search Engines	0.259
227. Samsung Yepp	Media Player	0.259
229. Pinnacle	Multimedia, Graphics, & Publishing Software	0.254
230. Adaptec	Auxiliary Devices	0.253
230. Siemens	Mobile Phone	0.253
232. EMC	Enterprise Infrastructure Software	0.251
232. Checkpoint	Security Software	0.251
234. Bloomberg	Internet - News and Information	0.249
234. Sportsillustrated.cnn.com	Internet - Sports	0.249
236. SWSoft	Virtualization Software	0.248
237. Cox Enterprises	Cable / Satellite Network Systems	0.247
237. Westinghouse	HDTV	0.247
239. Newegg	Internet - Pure Play Shopping	0.246
240. Hitachi	Servers	0.244

Brand	Category	Brand Impact Score
241. Kensington	Auxiliary Devices	0.243
242. LiveJournal	Internet - Social Networking	0.241
243. Network Appliances	Enterprise Storage	0.240
244. Tibco	Enterprise Infrastructure Software	0.239
244. Virgin	Wireless Carrier	0.239
246. Centra Software	Conferencing Solutions	0.237
247. Friendster	Internet - Social Networking	0.236
248. Parallels	Virtualization Software	0.235
249. Business Objects	Enterprise Infrastructure Software	0.233
250. Xilink	Semiconductors	0.231
251. Kyocera	Bluetooth Headsets	0.230
252. 3Com	Auxiliary Devices	0.228
253. Fujitsu	Servers	0.227
254. MSN Spaces	Internet - Social Networking	0.226
254. US Cellular	Wireless Carrier	0.226
256. Cablevision Systems	Cable / Satellite Network Systems	0.225
257. Fuji	Printers	0.223
257. BEA	Enterprise Infrastructure Software	0.223
259. Buffalo	Wireless Networking Devices	0.218
260. LiveScore.com	Internet - Sports	0.217
261. Charter Communciations	Cable / Satellite Network Systems	0.214
262. Labtec	Auxiliary Devices	0.213
262. ST Microelectronics	Semiconductors	0.213
264. Aliph Jawbone	Bluetooth Headsets	0.209
265. Mio	GPS	0.205
265. Second Life	Internet - Social Networking	0.205
267. B&O	Home Theatre	0.203
267. Blue Arc	Enterprise Storage	0.203
269. LinkedIn	Internet - Social Networking	0.197
270. Lawrence	GPS	0.196

Brand	Category	Brand Impact Score
270. LSI	Enterprise Storage	0.196
272. Pillar	Enterprise Storage	0.192
273. iRiver Clix	Media Player	0.186
274. Tribe	Internet - Social Networking	0.177
275. Redback	Networking Devices	0.175
276. Fellowes	Bluetooth Headsets	0.166
277. StubHub	Internet - Pure Play Shopping	0.164
278. Fujitsu	Computers	0.160
279. Rotoworld	Internet - Sports	0.159
280. HTC Faraday / Tornado	Smartphone - Consumer	0.151
281. Lenovo	Computers	0.142
281. Archos	Media Player	0.142
283. BenQ	Auxiliary Devices	0.108
284. HatTrick.com	Internet - Sports	0.106
285. Metro PCS	Wireless Carrier	0.089

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Brand Impact Scores:
B2B Categories

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B2B Category: Networking Devices

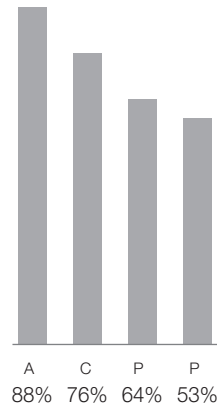Winner: **Cisco**

Brand Impact Score: .86

Brand Power Rating   .74
Brand Reputation Rating   .94
Judges' Rating   1.00

ACPP Score

Awareness   88%
Consideration   76%
Preference   64%
Purchase Intent   53%

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A     C     P     P
88%   76%   64%   53%
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Judges' Comments

"In this space, it's hard not to give Cisco the highest rating."

"HP is always the stealth player and not particularly visible. They have a nice line but are reticent to talk about it… If HP started to openly promote their products, they could probably do some damage to Cisco – they are going head to head in terms of tele-presence."

"Cisco is clearly the dominant player in this category, though HP deserves kudos for its significant rise in the ratings. Absent a spectacular error or fall from grace, I expect that Cisco is likely to retain its considerable advantage."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Cisco	**0.86**	0.74	0.94	1.00
2. HP	**0.65**	0.61	0.82	0.29
3. Juniper	**0.45**	0.27	0.77	0.50

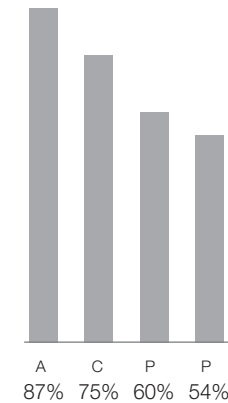B2B Category: CRM Software

Winner: **Oracle (Siebel)**

Brand Impact Score: .81

Brand Power Rating   .66
Brand Reputation Rating   .90
Judges" Rating   1.00

ACPP Score

Awareness   87%
Consideration   75%
Preference   60%
Purchase Intent   54%

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A     C     P     P
87%   75%   60%   54%
```

Judges' Comments

"Oracle is stronger in the space, especially in the high end. Microsoft Great Plains has a stronger brand in the mid market."

"Netsuite is in the process of an IPO. It's interesting that their awareness level is close to Salesforce, but the purchase intent is very different among the two."

"The SAP vs. Salesforce numbers are interesting because I think Salesforce is more the up and comer."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges" Rating
1. Oracle (Siebel)	**0.81**	0.66	0.90	1.00
2. Microsoft	**0.67**	0.75	0.86	0.42
3. SAP	**0.57**	0.54	0.87	0.42

Category: Virtualization Software

Winner: **Microsoft Virtual Server**

Brand Impact Score: **.67**

Brand Power Rating	.69
Brand Reputation Rating	.87
Judges' Rating	.50

ACPP Score

Awareness	87%
Consideration	74%
Preference	51%
Purchase Intent	45%

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        A     C     P     P
       87%   74%   51%   45%
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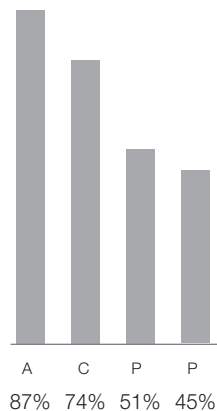
Judges' Comments

"Here, being VMWare's size over time will hurt it and they will be running against Microsoft with its big budgets. How well will VMWare staff up and how much resource will EMC put behind them? As a separate subsidiary, they will have difficulty putting the power of the corporate brand behind VMWare …they are at arm's length."

"There's a lot of confusion in this market and everybody is talking virtualization. Virtualization will be a tough category going forward."

"This type of highly complex and diverse marketplace is one where brand is going to play a huge role."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Microsoft Virtual Server	**0.67**	0.69	0.87	0.50
2. VMWare	**0.64**	0.46	0.91	0.75
3. Novell	**0.57**	0.50	0.84	0.50

Category: Conferencing Solutions

Winner: **Microsoft Live Meeting**

Brand Impact Score: **.79**

Brand Power Rating	.75
Brand Reputation Rating	.82
Judges' Rating	.83

ACPP Score

Awareness	86%
Consideration	70%
Preference	61%
Purchase Intent	55%

```
        A     C     P     P
       86%   70%   61%   55%
```
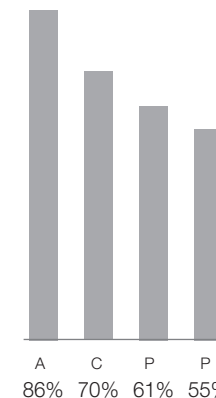
Judges' Comments

"What's particularly interesting is how little movement there has been in this category, despite vendors' continuing efforts. That suggests a situation where customers are essentially happy with what they have, which favors leading solutions like Microsoft's as the market continues to develop."

"Adobe has the best product, but there's brand confusion because they acquired it from Macromedia. It was Breeze and now recently named Connect. The question is whether they'll put any weight behind it since it's not their main product. Adobe doesn't have a real sales machine like Webex."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Microsoft Live Meeting	**0.79**	0.75	0.82	0.83
2. WebEx	**0.61**	0.53	0.86	0.58
3. Adobe Breeze/Connect	**0.55**	0.47	0.80	0.50

Category: Security Software
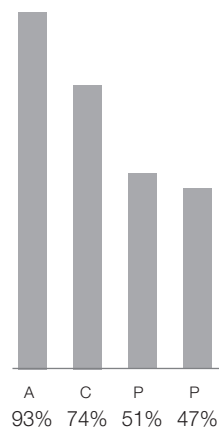
Winner: **Symantec**

Brand Impact Score: .83

Brand Power Rating   .72
Brand Reputation Rating   .85
Judges' Rating   1.00

ACPP Score

Awareness   93%
Consideration   74%
Preference   51%
Purchase Intent   47%

| A | C | P | P |
| 93% | 74% | 51% | 47% |

Judges' Comments

"Microsoft's 2007 cannonball leap into this category does not appear to have rocked Symantec's boat to any great degree. That might change as Vista adoption grows, but for now Symantec's formidable lead looks extremely secure."

"The wild card remains Microsoft because of their connection to the operating system. The fact that a majority of folks want security software built into the OS would indicate they've got a lot of potential here. Their problem is that their product hasn't been competitive and that takes down their preference and purchase intent. If they can fix that, they have a chance to do well here."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Symantec	**0.83**	0.72	0.85	1.00
2. McAfee	**0.67**	0.67	0.67	0.67
3. Microsoft	**0.46**	0.54	0.58	0.25

Category: Multimedia, Graphics,, and Publishing Software

Winner: **Adobe**

Brand Impact Score: .91

Brand Power Rating   .83
Brand Reputation Rating   .95
Judges' Rating   1.00

ACPP Score

Awareness   94%
Consideration   85%
Preference   72%
Purchase Intent   67%

| A | C | P | P |
| 94% | 85% | 72% | 67% |

Judges' Comments

Once a vendor finds a comfortable home within businesses, it is difficult for competitors to move into the neighborhood. And if the competition is facing a player with products and services as excellent as Adobe's, it might be easier to just pull up stakes and find another town. When you find vendors display market and technical leadership together, as in the case of Adobe, superlatives are well-earned and fully deserved.

Corel has zero marketing budget, a good product line and one of the loyalist followings in the segment.   It shows loyalty does count for something.

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Adobe	**0.91**	0.83	0.95	1.00
2. Microsoft	**0.68**	0.70	0.78	0.58
3. Corel	**0.46**	0.53	0.71	0.17

liquid

Category: Enterprise Storage

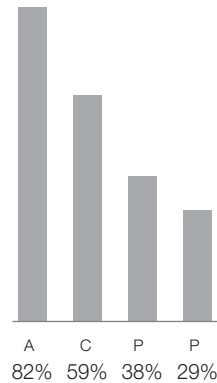Winner: **IBM**

Brand Impact Score: **.67**

Brand Power Rating   .59
Brand Reputation Rating   .88
Judges' Rating   .67

ACPP Score

Awareness   82%
Consideration   59%
Preference   38%
Purchase Intent 29%

A	C	P	P
82%	59%	38%	29%

Judges' Comments

"IBM's first place finish in an increasingly competitive and contentious market is worth applauding. The company's historic leadership in storage innovation has served them well in both brand recognition and customer satisfaction."

"There's tremendous pull through for system vendors – the halo the system vendors have in this category is getting more extreme."

"People don't always make connection back to the EMC brand. They purchase EMC hardware through someone else and someone else is often getting the brand recognition."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. IBM	**0.67**	0.59	0.88	0.67
2. HP	**0.62**	0.63	0.88	0.42
3. Dell	**0.55**	0.58	0.75	0.38

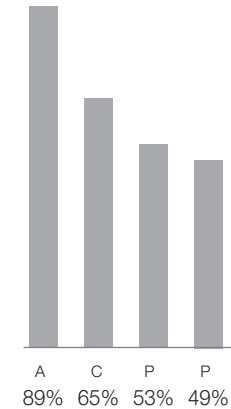Category: Servers

Winner: **Dell**

Brand Impact Score: **.83**

Brand Power Rating   .72
Brand Reputation Rating   .84
Judges' Rating   1.00

ACPP Score

Awareness   89%
Consideration   65%
Preference   53%
Purchase Intent 49%

A	C	P	P
89%	65%	53%	49%

Judges' Comments

"Interesting to see the fall off of Sun. They used to be dominant and have given emphasis to the enterprise side."

"The near perfectly mirrored flip/flop of Dell and HP from 2007 to 2008, with Dell coming out clearly in first place, is one of the most remarkable data points in this study. This is especially the case when one considers the fact that 2007 has been a tumultuous year for Dell with the company rebuilding after the return of founder Michael Dell. What we may be seeing here is a combination of Dell returning to form even as the company's most serious competitor in one market is losing its grip on another."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Dell	**0.83**	0.72	0.84	1.00
2. HP	**0.69**	0.68	0.89	0.58
3. IBM	**0.63**	0.65	0.90	0.42

liquid

Category: Semiconductors
....

Winner: **Intel**

Brand Impact Score: **.88**
....

Brand Power Rating   .79
Brand Reputation Rating   .91
Judges' Rating   1.00

ACPP Score
....

Awareness   83%
Consideration   59%
Preference   38%
Purchase Intent   29%

A	C	P	P
83%	59%	38%	29%
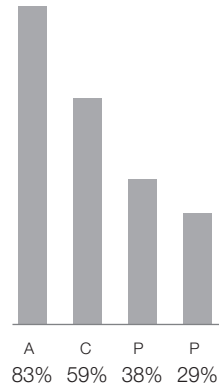
Judges' Comments
....

"This year is a year where Intel is roaring back and moving aggressively across its product lines and targeting AMD."

"Intel improved their brand messaging a lot. They went back to the basics, promoting the benefits of having Intel in your pc, as opposed to the stupid stuff they've done in the past."

Top Three Category Brands
....

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Intel	**0.88**	0.79	0.91	1.00
2. ADM	**0.69**	0.66	0.81	0.67
3. TI	**0.51**	0.59	0.72	0.25

Category: Transaction Security
....

Winner: **VeriSign**

Brand Impact Score: **.88**
....

Brand Power Rating   .80
Brand Reputation Rating   .88
Judges' Rating   1.00

ACPP Score
....

Awareness   89%
Consideration   80%
Preference   74%
Purchase Intent   63%

A	C	P	P
89%	80%	74%	63%

Judges' Comments
....

"VeriSign owns this space in terms of transaction security. No one else besides Entrust matters."

"VeriSign has been in the game and identified with that specific problem from the beginning. That's who they've always been. In practice, it's only between VeriSign and Entrust."

Top Three Category Brands
....

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. VeriSign	**0.88**	0.80	0.88	1.00
2. Open SSL	**0.43**	0.39	0.80	0.25
3. Netscape	**0.39**	0.40	0.67	0.17

Category: Enterprise Infrastructure Software

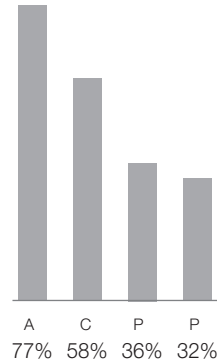Winner: **Microsoft**

Brand Impact Score: **.81**

Brand Power Rating   .74
Brand Reputation Rating   .82
Judges' Rating   .92

ACPP Score

Awareness   77%
Consideration   58%
Preference   36%
Purchase Intent   32%

```
A     C     P     P
77%   58%   36%   32%
```

Judges' Comments

"This shows the power of major software brands within the enterprise space."

"The broad value prop / brand awareness of the big players leads to pull through for those brands."

"Microsoft's brand leadership here likely reflects the continuing, spectacular sales growth of x86-based servers among businesses of virtually every sort and size. Whenever Dell or HP or IBM sells a Wintel server, Microsoft's brand also profits."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Microsoft	**0.81**	0.74	0.82	0.92
2. IBM	**0.62**	0.59	0.86	0.50
3. HP	**0.60**	0.61	0.84	0.42

Category: Smart Phones - Business

Winner: **RIM - Blackberry**

Brand Impact Score: **.85**

Brand Power Rating   .74
Brand Reputation Rating   .88
Judges' Rating   1.00

ACPP Score

Awareness   88%
Consideration   73%
Preference   56%
Purchase Intent   53%

```
A     C     P     P
88%   73%   56%   53%
```
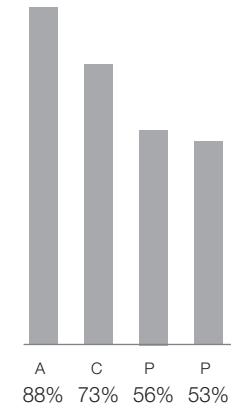
Judges' Comments

"It's commonly believed that once Apple fixes the business side of the product, the iPhone will make a big push in this (business) side. Right now, what's hurting is the cost of the device and the fact you can't expense it. Right now, most companies still see it as a consumer device."

"This is spearheading the blurring of the enterprise and consumer segments for phones – today, if you are in business you have a Blackberry, but the iPhone is blurring that distinction and in a year from now business and consumer will meld."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. RIM - Blackberry	**0.85**	0.74	0.88	1.00
2. Motorola	**0.54**	0.62	0.77	0.25
3. Palm	**0.53**	0.59	0.82	0.25

liquid

Brand Impact Scores:
B2C Categories

liquid

Category: Wireless Carrier

....

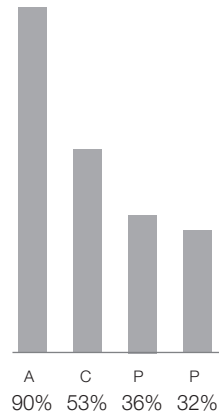Winner: **AT&T**

Brand Impact Score: .70

Brand Power Rating   .62
Brand Reputation Rating   .63
Judges' Rating   .89

ACPP Score

Awareness   90%
Consideration   53%
Preference   36%
Purchase Intent   32%

A   C   P   P
90%   53%   36%   32%

Judges' Comments

"I'd have expected AT&T to be doing better with their special arrangement with Apple."

"Metro PCS is killing their market segment selling on low price and no contract, urban targeted."

"Verizon moving to an open platform is a step in the right direction, but unless they carry the devices consumers want, they're going to continue to fall behind carriers like AT&T and T-Mobile that have a broad spectrum of device selection."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. AT&T	**0.70**	0.62	0.63	0.89
2. Verizon	**0.68**	0.62	0.69	0.78
3. T-Mobile	**0.44**	0.52	0.54	0.22

Category: External Hard Drive

....

Winner: **Western Digital**

Brand Impact Score: .70

Brand Power Rating   .60
Brand Reputation Rating   .84
Judges' Rating   .78

ACPP Score

Awareness   54%
Consideration   47%
Preference   40%
Purchase Intent   36%

A   C   P   P
54%   47%   40%   36%
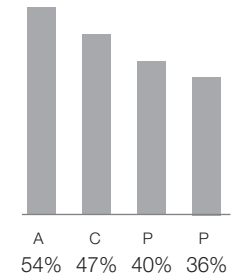
Judges' Comments

"Western Digital usually is less expensive and they do well on that front."

"Right now the industry players compete on price because there's no 'value' around these things… but there will be. Seagate is finding ways to add value to the hard drive market, even in OEM applications, by shipping drives with pre-programmed media. This is going to change the market from a commodity to a value-added component."

"Iomega is still hanging in there, I find that surprising because I haven't seen that name in a long time."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Western Digital	**0.70**	0.60	0.84	0.78
2. Dell	**0.63**	0.57	0.71	0.67
3. Seagate/Maxtor	**0.61**	0.52	0.90	0.56

liquid

Category: Mobile Phone

....

Winner: **Motorola**

Brand Impact Score: **.83**
....

Brand Power Rating   .73
Brand Reputation Rating   .85
Judges' Rating   1.00

ACPP Score
....

Awareness   92%
Consideration   73%
Preference   58%
Purchase Intent   49%

A   C   P   P
92%   73%   58%   49%
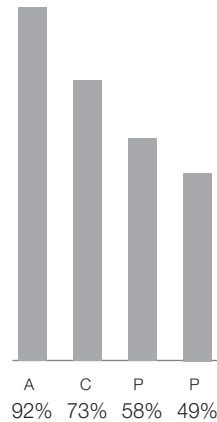
Judges' Comments
....

"There's a lot of saber rattling going on right now around open standards."

"When a brand figures out a compelling way to make a different handset experience in a much more open ecosystem, then I think there's a real opportunity to take the market."

Top Three Category Brands
....

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Motorola	**0.83**	0.73	0.85	1.00
2. Nokia	**0.67**	0.64	0.75	0.67
3. Samsung	**0.52**	0.55	0.74	0.33

Category: HDTV

....

Winner: **Sony**

Brand Impact Score: **.85**
....

Brand Power Rating   .72
Brand Reputation Rating   .94
Judges' Rating   1.00

ACPP Score
....

Awareness   92%
Consideration   77%
Preference   55%
Purchase Intent   49%

A   C   P   P
92%   77%   55%   49%
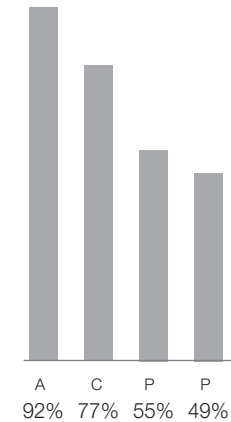
Judges' Comments
....

"There are things that Sony does from a technical aspect that a consumer will never have to consider, but that differentiate the experience."

"Vizio is cheap and they have no IP, but they are starting to make headway in the market. And, if they stick around and product quality remains good, then consumers will make them part of their consideration set because it's a good price and it works. Next time this year, Vizio is going to climb up this rank!"

"Vizio is able to take advantage of this complexity and is building a brand out of nowhere because it is so difficult to discern a difference between the products in this category."

Top Three Category Brands
....

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Sony	**0.85**	0.72	0.94	1.00
2. Panasonic	**0.59**	0.59	0.82	0.44
3. Samsung	**0.52**	0.55	0.72	0.33

liquid

Category: Media Player

Winner: **Apple iPod**

Brand Impact Score: **.87**

Brand Power Rating   .79
Brand Reputation Rating   .89
Judges' Rating   1.00

ACPP Score

Awareness   91%
Consideration   73%
Preference   65%
Purchase Intent 60%

A   C   P   P
91% 73% 65% 60%
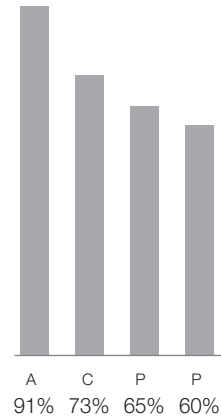
Judges' Comments

"Might as well just have one brand here."

"Microsoft is actually selling a lot more Zunes in Gen 2, the hardware is so much better."

"From an industry standpoint, competition is going to heat up when the DRM windows fall, allowing content to be purchased from any source and played on any device. This could happen as early as 2008. It will come down to which device works best for you."

"Everyone still wants an iPod!"

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Apple iPod	**0.87**	0.79	0.89	1.00
2. Microsoft Zune	**0.57**	0.47	0.67	0.67
3. Sony Mylo	**0.45**	0.52	0.78	0.11

Category: Handheld Video Game

Winner: **Nintendo DS**

Brand Impact Score: **.75**

Brand Power Rating   .68
Brand Reputation Rating   .90
Judges' Rating   .78

ACPP Score

Awareness   85%
Consideration   65%
Preference   49%
Purchase Intent 43%

A   C   P   P
85% 65% 49% 43%
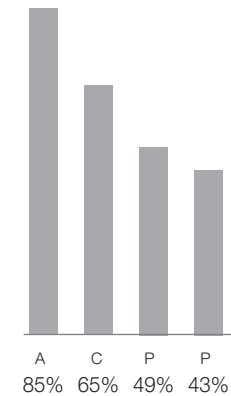
Judges' Comments

"There's a lot of enthusiasm around convergence in this category."

"The problem with universal convergence is that the devices are likely to do all things pretty poorly, and none of them very well. So convergence is unlikely to upset this category."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Nintendo DS	**0.75**	0.68	0.90	0.78
2. Sony PSP	**0.75**	0.68	0.87	0.78
3. Nintendo Gameboy	**0.62**	0.65	0.80	0.44

liquid

Category: Video Game Console

Winner: **Sony Playstation 3**

Brand Impact Score: **.75**

Brand Power Rating   .74
Brand Reputation Rating   .92
Judges' Rating   .67

ACPP Score

Awareness   91%
Consideration   76%
Preference   56%
Purchase Intent 51%

A	C	P	P
91%	76%	56%	51%
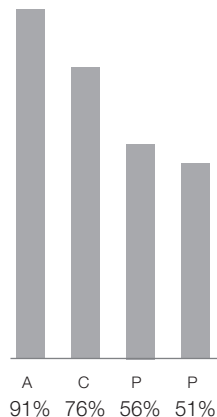
Judges' Comments

"The Nintendo Wii product-market fit was just so perfect, it saved the company from perceived obscurity."

"PS3 threw too many value propositions at the market with Blu-Ray and everything else. Wii had a simple value proposition and used one feature to differentiate."

"Other competitors are now building an entire social gaming category. Wii will need to develop games that truly engage the immersive gamers or the Wii will be relegated to just being something you bring out at a party."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Sony PS3	**0.75**	0.74	0.92	0.67
2. Nintendo Wii	**0.72**	0.66	0.80	0.78
3. Microsoft Xbox 360	**0.66**	0.66	0.83	0.56

Category: Bluetooth

Winner: **Motorola**

Brand Impact Score: **.86**

Brand Power Rating   .77
Brand Reputation Rating   .89
Judges' Rating   1.00

ACPP Score

Awareness   89%
Consideration   83%
Preference   68%
Purchase Intent 58%

A	C	P	P
89%	83%	68%	58%

Judges' Comments

"New legal regulations requiring these devices in cars will make retail a much more important arena for these brands because consumers will be heading to Best Buy and other retailers to get one."

"Jawbone is the up and coming brand in this category."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Motorola	**0.86**	0.77	0.89	1.00
2. Nokia	**0.52**	0.41	0.76	0.56
3. Samsung	**0.49**	0.41	0.77	0.44

liquid

Category: Video Game Developer

Winner: **EA**

Brand Impact Score: .80

Brand Power Rating   .65
Brand Reputation Rating   .89
Judges' Rating   1.00

ACPP Score

Awareness   61%
Consideration   57%
Preference   47%
Purchase Intent   42%

A   C   P   P
61%   57%   47%   42%
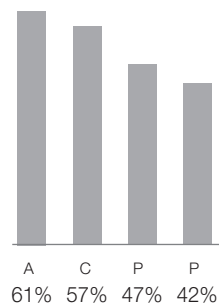
Judges' Comments

"Developer brand is something that reduces uncertainty for parents."

"Everyone but EA realizes that they have a weak master brand, just can't figure out how to organize around that and get out of their niche. There's untapped value in EA."

"Developers care about branding the games more than anything because that's what drives the revenue. In this category, it's all about the game."

Category: Internet - Sports Site

Winner: **ESPN.com**

Brand Impact Score: .77

Brand Power Rating   .60
Brand Reputation Rating   .85
Judges' Rating   1.00

ACPP Score

Awareness   86%
Consideration   42%
Preference   31%
Purchase Intent   30%

A   C   P   P
86%   42%   31%   30%
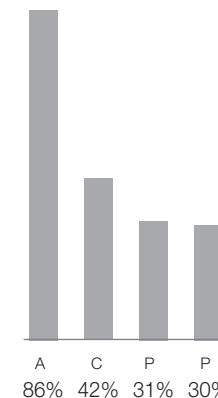
Judges' Comments

"ESPN is doing great things with video, allowing users to go back to all materials and view, anytime."

"ESPN does the best job by far."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. EA	**0.80**	0.65	0.89	1.00
2. Microsoft	**0.66**	0.73	0.82	0.44
3. Sony	**0.59**	0.70	0.88	0.22

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. ESPN.com	**0.77**	0.60	0.85	1.00
2. NFL.com	**0.53**	0.48	0.78	0.44
3. Yahoo.com	**0.51**	0.44	0.80	0.44

liquid

Category: Internet - Social Networking Sites

Winner: **MySpace**

Brand Impact Score: **.84**

Brand Power Rating   .78
Brand Reputation Rating   .74
Judges' Rating   1.00

ACPP Score

Awareness   100%
Consideration   77%
Preference   60%
Purchase Intent   56%

```
A      C      P      P
100%   77%    60%    56%
```
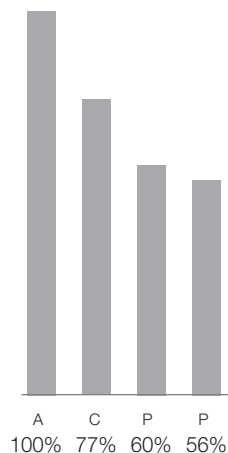
Judges' Comments

"I find Yahoo 360 a surprising 4th place, but it's probably a result of their broad reach. Actual user engagement is likely to be zero."

"Facebooks meteoric rise was the big story of 2007."

"Surprising that LinkedIn didn't get higher!"

"World of warcraft should probably be considered as part of this list."

"Xbox live is technically a community now, with 8 million users."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. MySpace	**0.84**	0.78	0.74	1.00
2. Facebook	**0.66**	0.53	0.66	0.67
3. YouTube	**0.59**	0.56	0.72	0.33

Category: Smartphone - Consumer

Winner: **Apple iPhone**

Brand Impact Score: **.73**

Brand Power Rating   .58
Brand Reputation Rating   .73
Judges' Rating   1.00

ACPP Score

Awareness   79%
Consideration   50%
Preference   37%
Purchase Intent   28%

```
A     C     P     P
79%   50%   37%   28%
```
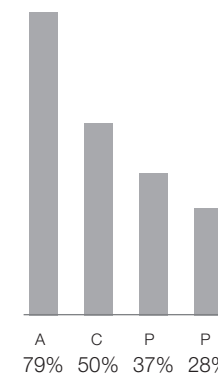
Judges' Comments

"The iPhone was the most anticipated consumer device of the last 10 years!"

"Most consumers wouldn't call the iPhone a smartphone."

"The Blackberry pearl is generating some serious traction to be number 4 in only 8 months." Ben

"Palm Centro will be an up and coming brand in this category. Very popular among college students."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Apple iPhone	**0.73**	0.58	0.73	1.00
2. RIM - Blackberry	**0.56**	0.49	0.90	0.44
3. Motorola Q	**0.51**	0.44	0.80	0.44

liquid

Category: Computers

Winner: **HP/Compaq**

Brand Impact Score: **.73**

Brand Power Rating   .69
Brand Reputation Rating   .78
Judges' Rating   .78

ACPP Score

Awareness   92%
Consideration   64%
Preference   48%
Purchase Intent   42%

A   C   P   P
92%   64%   48%   42%
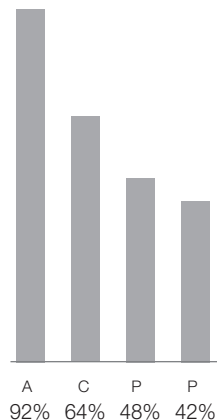
Judges' Comments

"This category is going to drastically change over the next few years."

"Dell is about to step it up a notch and really go after HP."

"Apple's superior retail strategy will help them maintain and grow market share."

"I'm surprised Toshiba is ranked as high as they are, last I heard they have zero brand awareness."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. HP/Compaq	**0.73**	0.69	0.78	0.78
2. Dell	**0.72**	0.68	0.74	0.78
3. Apple	**0.51**	0.49	0.65	0.44

Category: Auxilliary Devices

Winner: **Logitech**

Brand Impact Score: **.80**

Brand Power Rating   .67
Brand Reputation Rating   .81
Judges' Rating   1.00

ACPP Score

Awareness   85%
Consideration   71%
Preference   48%
Purchase Intent   42%

A   C   P   P
85%   71%   48%   42%
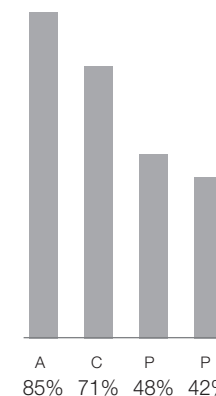
Judges' Comments

"Kensington used to be a leader, interesting to see that they're so far down the list."

"People default to Logitech when shopping for these devices."

"In this category, retail plays such a huge portion in the overall marketing and brand awareness. Logitech owns retail for these products."

"Brand matters a lot in this category."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Logitech	**0.80**	0.67	0.81	1.00
2. Microsoft	**0.69**	0.66	0.81	0.67
3. HP	**0.59**	0.65	0.81	0.33

liquid

Category: Printers

Winner: **HP**

Brand Impact Score: .88

Brand Power Rating   .80
Brand Reputation Rating   .91
Judges' Rating   1.00

ACPP Score

Awareness   95%
Consideration   83%
Preference   66%
Purchase Intent   61%

A   C   P   P
95%   83%   66%   61%
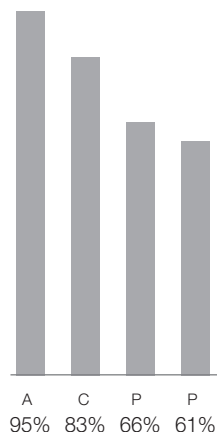
Judges' Comments

"This category will see brands competing over a smaller and smaller pie."

"Kodak is doing great things in this category, really connecting with consumers."

"We have not even seen the peak of the value of digital printing yet."

"I think Kodak is going to make a real rise. HP knows it and is sweating as a result."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. HP	**0.88**	0.80	0.91	1.00
2. Epson	**0.53**	0.52	0.67	0.44
3. Canon	**0.48**	0.54	0.70	0.22

Category: Wireless Networking

Winner: **Linksys**

Brand Impact Score: .83

Brand Power Rating   .70
Brand Reputation Rating   .91
Judges' Rating   1.00

ACPP Score

Awareness   76%
Consideration   68%
Preference   56%
Purchase Intent   49%

A   C   P   P
76%   68%   56%   49%
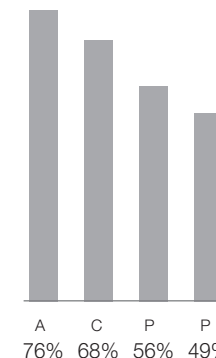
Judges' Comments

"Cisco is slowly transitioning the Linksys brand to fall under Cisco and is already established as a trusted brand in networking. The issue is that Linksys was always the value product at a lower price point and strong retail presence, and that's not what Cisco is associated with."

"It's going to be a while before we see any of these products working together in perfect harmony. Right now if you use ALL Microsoft or ALL HP products it will work, but who realistically has all the same brand product?"

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Linksys	**0.83**	0.70	0.91	1.00
2. NETGEAR	**0.58**	0.47	0.75	0.67
3. D-Link	**0.45**	0.42	0.69	0.33

liquid

Category: Internet - Search

Winner: **Google**

Brand Impact Score: **.93**

Brand Power Rating   .87
Brand Reputation Rating .95
Judges' Rating   1.00

ACPP Score

Awareness   96%
Consideration   90%
Preference   76%
Purchase Intent 75%

A	C	P	P
96%	90%	76%	75%
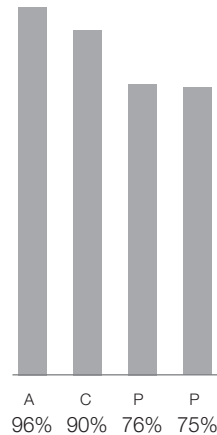
Judges' Comments

"The perception that Google has a superior search engine is very powerful! It will take a lot to change that perception because it's so difficult for consumers to understand the difference."

"Purpose built search engines around specific content categories are better than Google is at that particular category. Google is a better starting point and I think they'll be able to co-exist."

"Google has been trying to build a stronger connection to the consumer and they have a great brand, but they're just not rooted very deeply yet. If another brand came up with a better search engine, I'd switch in a heartbeat."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Google	**0.93**	0.87	0.95	1.00
2. Yahoo	**0.65**	0.60	0.74	0.67
3. MSN	**0.48**	0.53	0.59	0.33

Category: Internet - Pure Play

Winner: **Amazon**

Brand Impact Score: **.94**

Brand Power Rating   .91
Brand Reputation Rating .91
Judges' Rating   1.00

ACPP Score

Awareness   99%
Consideration   94%
Preference   84%
Purchase Intent 82%

A	C	P	P
99%	94%	84%	82%
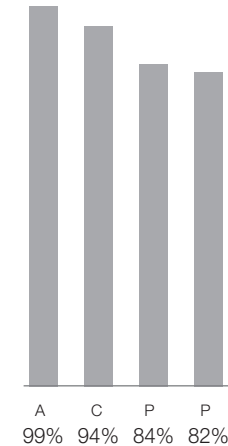
Judges' Comments

"iTunes is not a very easy to use website. It's not very easy to navigate and it's not very intuitive. There's a lot of content and it's pretty to look at, but they could really stand to improve the functionality because it's a barrier to entry."

"Amazon's been doing this so long and they've got such a great model, it's tough to think of a stronger brand in this category. If there is going to be a challenger, it's likely to be a brick and mortar store because the distinction between channels is diminishing in the mind of the consumer. Plus, if you shop at BestBuy.com, you can go pick up in the store."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Amazon	**0.94**	0.91	0.91	1.00
2. eBay	**0.69**	0.71	0.67	0.67
3. Overstock	**0.51**	0.58	0.57	0.33

liquid

Category: Internet - News

Winner: **CNN.com**

Brand Impact Score: **.76**

Brand Power Rating   .61
Brand Reputation Rating   .79
Judges' Rating   1.00

ACPP Score

Awareness   84%
Consideration   60%
Preference   34%
Purchase Intent   32%

```
A     C     P     P
84%   60%   34%   32%
```
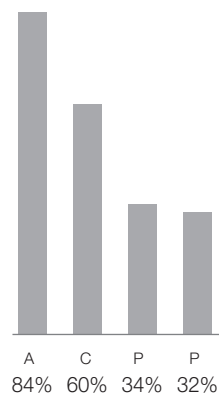
Judges' Comments

"CNN has great editorial and when it comes to news and info content is king."

"I'm surprised Google News isn't higher in the rankings."

"It will be interesting to watch how 'citizen journalism' like DIGG will impact traditional players like CNN and MSNBC."

Category: Cable/Satellite

Winner: **DirecTV**

Brand Impact Score: **.65**

Brand Power Rating   .55
Brand Reputation Rating   .57
Judges' Rating   .89

ACPP Score

Awareness   81%
Consideration   45%
Preference   29%
Purchase Intent   23%

```
A     C     P     P
81%   45%   29%   23%
```
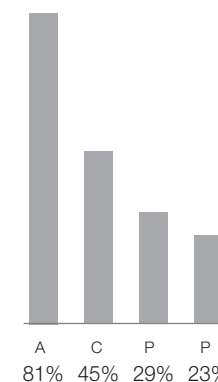
Judges' Comments

"The cable/satellite players have the lowest reputation scores of any category, but it doesn't have to be that way."

"IPTV could shake things up in this space as new players like AT&T and Verizon enter the category."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. CNN.com	**0.76**	0.61	0.79	1.00
2. MSNBC.com	**0.55**	0.54	0.74	0.44
3. Weather.com	**0.54**	0.53	0.69	0.44

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. DirecTV	**0.65**	0.55	0.57	0.89
2. Comcast	**0.69**	0.71	0.67	0.67
3. Time Warner	**0.51**	0.58	0.57	0.33

liquid

Category: GPS

Winner: **Garmin**

Brand Impact Score: .76

Brand Power Rating   .61
Brand Reputation Rating   .79
Judges' Rating   1.00

ACPP Score

Awareness   77%
Consideration   71%
Preference   58%
Purchase Intent   53%

A   C   P   P
77%   71%   58%   53%
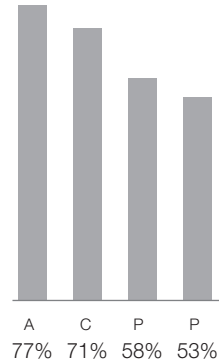
Judges' Comments

"Garmin's been around for a long time and had PDA based PGS from day one."

"There is a ton of potential for brands to innovate in this category."

"Everyone's asking what more can I build in?"

Category: Home Theatre

Winner: **Sony**

Brand Impact Score: .86

Brand Power Rating   .77
Brand Reputation Rating   .90
Judges' Rating   1.00

ACPP Score

Awareness   93%
Consideration   84%
Preference   64%
Purchase Intent   56%

A   C   P   P
93%   84%   64%   56%
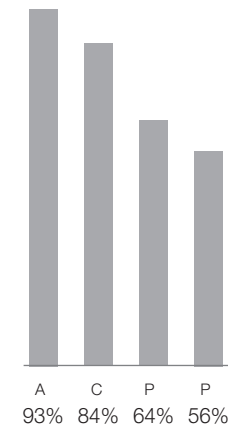
Judges' Comments

"The top three seem pretty neck and neck. They all innovate with the same features."

"The bigger brands are the ones who can pull it off in this category."

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Garmin	**0.86**	0.73	0.98	1.00
2. Magellan	**0.66**	0.57	0.86	0.67
3. Tom Tom	**0.48**	0.44	0.80	0.33

Top Three Category Brands

	Brand Impact	Brand Power	Brand Reputation	Judges' Rating
1. Sony	**0.86**	0.77	0.90	1.00
2. Panasonic	**0.68**	0.64	0.81	0.67
3. Pioneer	**0.57**	0.61	0.83	0.33

Brand Impact Study:
Methodology

liquid

The Socratic Brand Power Rating™ System

Historical and Theoretical Background. The quest to deliver a stable model that links a firm's marketing actions to a measurable return on investment has been the goal of marketing departments for at least the past three decades. Many theorists have attempted to link advertising, promotion, communications, public relations, sales strategies and other direct market actions to replicable and predictable outcomes that have a direct correlation with financial performance.

Since the mid-1990s a model that has shown a great deal of promise is the "sales funnel" concept.

The sales funnel model utilizes the "Awareness-Interest-Desire-Action (AIDA) framework and other planning concepts…[and has been particularly well] adapted to fit high tech services." (Dunn & Probstein, 2003, p 7.) In essence, this framework measures the power of a firm's brand—through its marketing activities—to directly influence the proportion of people who, once aware of the brand's presence in a market, are eventually converted to loyal, repeat customers. At each node of the sales funnel, brands tend to lose share. Precisely at what point the losses take place in the funnel are elements of the model that provide great diagnostic power for managerial action [See Figure 1].

Historically, the AIDA framework has been built on theories relating to the relationship between the customer and firm. The sales funnel model borrows from work that establishes that the stronger the relationship between the firm and the customer, the greater the loyalty due to higher barriers to switching brands.

An early theorist, Ford (1980) put forward a relationship development model that consists of five stages that directly relate to the AIDA framework:
•The pre-relationship stage - or the event that triggers a buyer/supplier to seek a new business partner.
•The early stage - where experience is accumulated between the two parties although
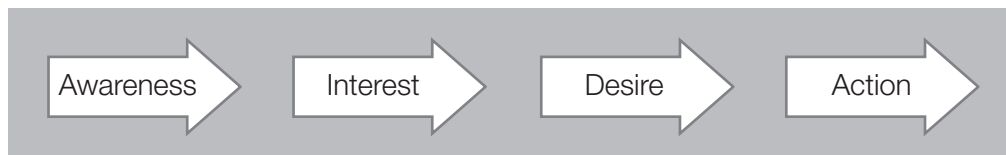
Figure 1: The Historical AIDA Framework

a great degree of uncertainty and distance exists.

•The development stage - where increased levels of transactions lead to a higher degree of commitment and the distance is reduced to a social exchange.

•The long-term stage - that is characterized by the companies' mutual importance to each other.

•The final stage - where the interaction between the companies becomes institutionalized. (quoted in Honeycutt, Ford & Simintiras, 2003, p. 256)

Another way of stating the "institutionalized relationship between companies," is loyalty, which in turn, has been shown to have a direct correlation with reduced costs and greater market share. As described by Frederick Reichheld (The Loyalty Effect, 1996), satisfied and loyal customers are less costly to serve, are less price sensitive, and tend to allocate more of their category dollars to the brand.

The Socratic Brand Power Rating™ (BPR) System
Since 1999, we have studied many versions of the sales funnel form of measurement

and have synthesized an improved version of brand power modeling with very strong correlations with current market share, but also has shown to track successfully against directional changes in future share.

The Socratic BPR system modifies the AIDA framework to measure four strong components common to most market conditions (Awareness-Consideration-Preference-Purchase Intent), and creates a single index number that indicates the overall efficacy of a brand to move customers down the sales funnel. A representation of the Socratic BPR is shown in Figure 2 (at right.

Similar to the AIDA framework, the BPR measures the drop-out of potential customers at each purchase decision node within the funnel. The degree of drop-out from start-to-finish indicates the efficiency with which the brand maintains control of the purchase process. The strongest brands are well known and convert the majority of the customers aware of the brand's presence into repeat buyers. Conceptually, the purchase decision conversion process can be described as follows:
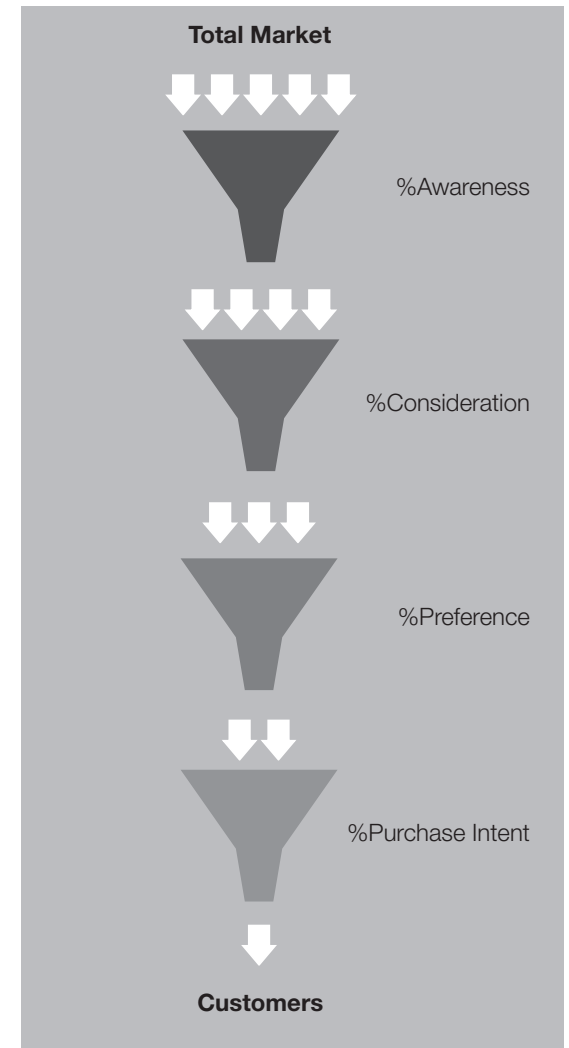
Figure 2: The Socratic Brand Power Rating™ System

•If a customer is not aware of a brand (in the relevant market segment), he or she cannot consider it for purchase
•If the brand is not considered, it cannot be preferred as one of the short-list of acceptable competitive substitutes
•If the brand is not one of the preferred brands, it is highly unlikely to be purchased on a loyal basis.

The BPR calculation itself is based on two market-proven realities:

1. The higher a brand's initial awareness, the stronger its general position vis-à-vis lesser known brands that must struggle (with both time and money) to make the market aware of their entry; and
2. The more people that are converted from simply "being aware of a brand" into being loyal customers, the stronger the brand's long term prospects for holding onto a share leadership position.

The BPR, therefore, is the average of the initial total % awareness and the conversion rate (% of those aware who are converted into customers).

Socratic Brand Power Rating Calculation

$$BPR = \left[\frac{(\%Awareness) + \left(\frac{\%Awareness}{\%PurchaseIntent} \right)}{2} \right] \otimes 100$$

The Brand Power Rating for any brand always falls on a 0 to 100 scale, where 100 means that 100% of the people in the market (based on a scientific sample) are aware of the brand's products and/or services and 100% of them have a strong purchase intent for those products and/or services. This would represent a virtual monopoly and rarely, if ever, exists in the real world; however, scores for some very strong brands frequently do reach the 85 to 90 mark.

A BPR of "0," on the other hand, represents a brand for which there is no awareness, nor is there any purchase intent. We frequently see weak brand BPRs in the 10 to 20 range, and only very rarely below 10.

In order to quickly communicate the meaning of a particular BPR score within a specific market, a qualitative scale has been created [See Table1] to describe the competitive power associated with various levels of BPR.

This process can also be depicted as a waterfall chart that shows the amount of "leakage" at each node [See Figure 3]. This brand is quite strong with a BPR of 78, indicating that it falls into the "Dominant" category of brand.

BPR Score	Description	BPR Score	Description
90 to 100	Monopoly	40 to 49	Entry
80 to 89	Hegemony	30 to 39	Minor
70 to 79	Dominant	20 to 29	Weak
60 to 69	Influential	10 to 19	Inconsequential
50 to 59	Competitive	0 to 9	Nescient

Table 1: BPR Point Interpretation

T   **A**   **C**   **P**   **P**

100%	90%	89%	71%	60%
	10% Loss	1% Loss	18% Loss	11% Loss

BPR:
((90% + [60%/90%]) / 2) x 100 = 78

Qualitative Interpretation:
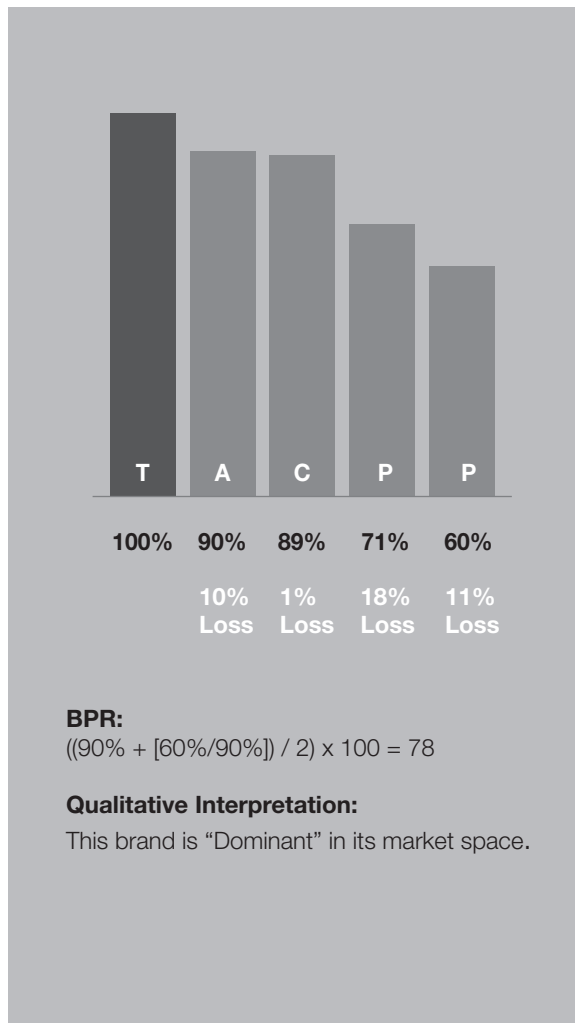This brand is "Dominant" in its market space.

Figure 3: ACPP Component Trend Declination of the Socratic BPR

Analyzing the Trend Declination
Simply understanding the overall BPR is not enough for management to take appropriate action, because the cause of a lower-than-expected BPR can come from many sources. As customers pass through the sales funnel, "brand bottlenecks" may occur (Chatterjee, Jauchius, Kaas & Satpathy, 2002). These bottlenecks are represented by large jumps or gaps in our waterfall chart. At each node of the funnel, the actions needed to correct a large drop-off of customers on their way to becoming loyal purchasers differ.

As the ACPP funnel progresses from Awareness to Purchase, the level and types of actions change from more strategic to more tactical actions [See Figure 4]. Generally, the strategic actions tend to take longer and cost more to implement than the more tactical actions. For example, establishing Brand Awareness usually requires a large advertising investment and takes a long

A   **C**   **P**   **P**

90%	89%	71%	60%
Strategic Actions			**Tactical Actions**

Communications
Advertising
PR
WOM
Institutional

EST Benefits
Quality
Performance
Value
Induce Trail

Targeting
Segment
Position
Relationship
Loyalty

Tactical
Channel Program
Promotion
POS
Discounting
Value
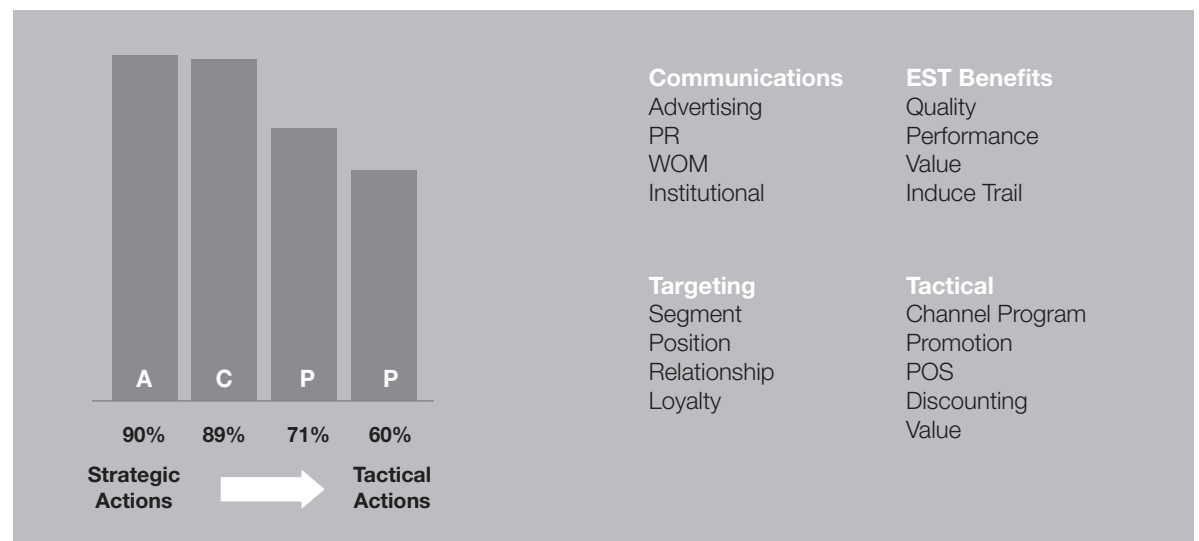
Figure 4: General Trend Declination of ACPP and Associated Brand Actions

time, particularly if there are other more well-established brands in the market.

This should not be interpreted as meaning that tactical programs are either cheap or fast to implement. If Purchase Intent is being hampered by pricing problems or distribution issues for example, the degree to which actions must be taken to influence the final purchase decision can, in fact, be very expensive.

Commonly Observed Problems

Over time, we have seen that brands operating within a niche technology market (either B2B or B2C), display any number of common issues within the ACPP sales funnel.

Low Initial Awareness

As mentioned previously, low Awareness is a major factor in depressed BPR scores. Unfortunately, it is also one of the more difficult, expensive and time-consuming problems to correct. The standard prescriptives include any number of communications programs, such as broadcast or direct advertising, public relations work, word-of-mouth campaigns and outreach through institutional channels in order to raise the general awareness and create positive associations with the brand.
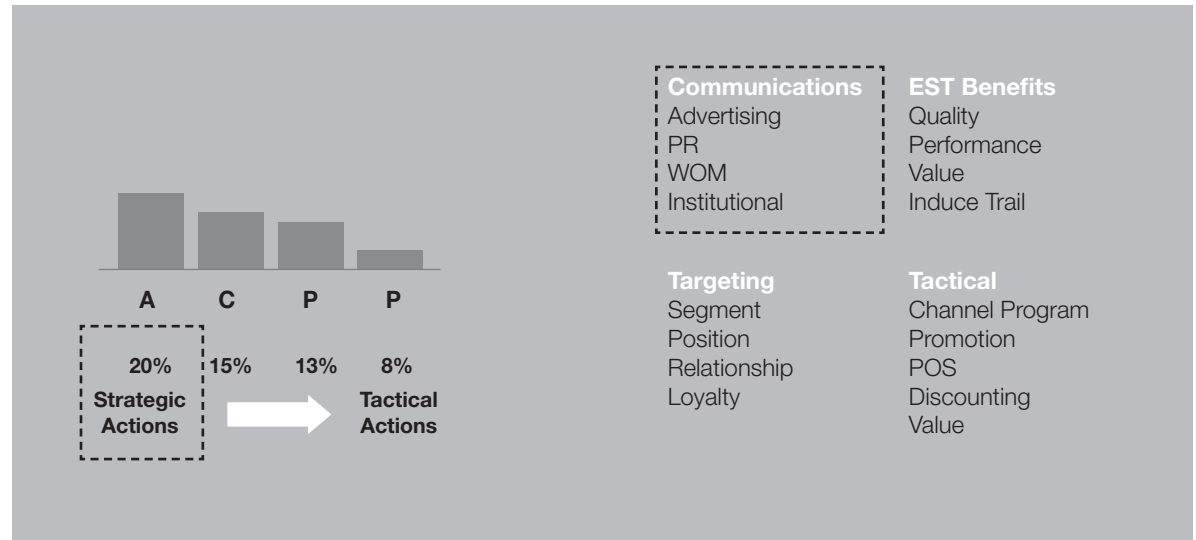
Figure 5: Trend Declination of ACPP: Low Awareness

Loss of Inclusion in the Consideration/Preference Set

Another commonly observed bottleneck is the drop-off between initial Awareness and Consideration. Consideration is defined as a brand cohort that would be generally acceptable as a substitute for other brands in the market. If people are aware of a brand, but still would not consider it, there is usually something wrong with the brand's reputation. Here, prescriptive activities include fixing quality, performance and/or value perceptions and communicating the "new and improved" brand-promise to the market.

Consideration problems can also be linked to "Preference Inertia" (MacElroy & Wydra, 2004), in which the market is "frozen" in loyalty to an existing brand that is "good enough" so as to not induce shopping for new alternatives. In this case, programs to induce trial (or re-trial) designed to demonstrate the improved and/or unique benefits of the brand, can help move customers (usually those with low levels of involvement in the category) from simple Awareness of

the brand to its active Consideration.

In many cases Consideration and Preference are closely associated (if there aren't many brands in a niche market, the brands that would be "considered" are often the same ones as those "preferred.") If there is a bottleneck in Preference, however, corrective actions may often include activities that further segment and target specific needs and desires, so as to raise the brand's relevance with target groups and to increase those customers' bonding with the brand.

Major Bottleneck at Point of Purchase
In some instances, the bottleneck in the funnel occurs at the final steps of securing a purchase. There are myriad possible reasons for this fall-off, including channel partners being influenced to promote other brands, price shock, competitive promotional activity, difficulty in promoting the benefits through the packaging, and so on. Most of these problems are addressed with tactical programs rather than strategic initiatives.

The types of programs that seem effective are as diverse as the problems they seek to correct. Examples include: Key city competitive funding of merchandising and local promotional advertising, channel promotions
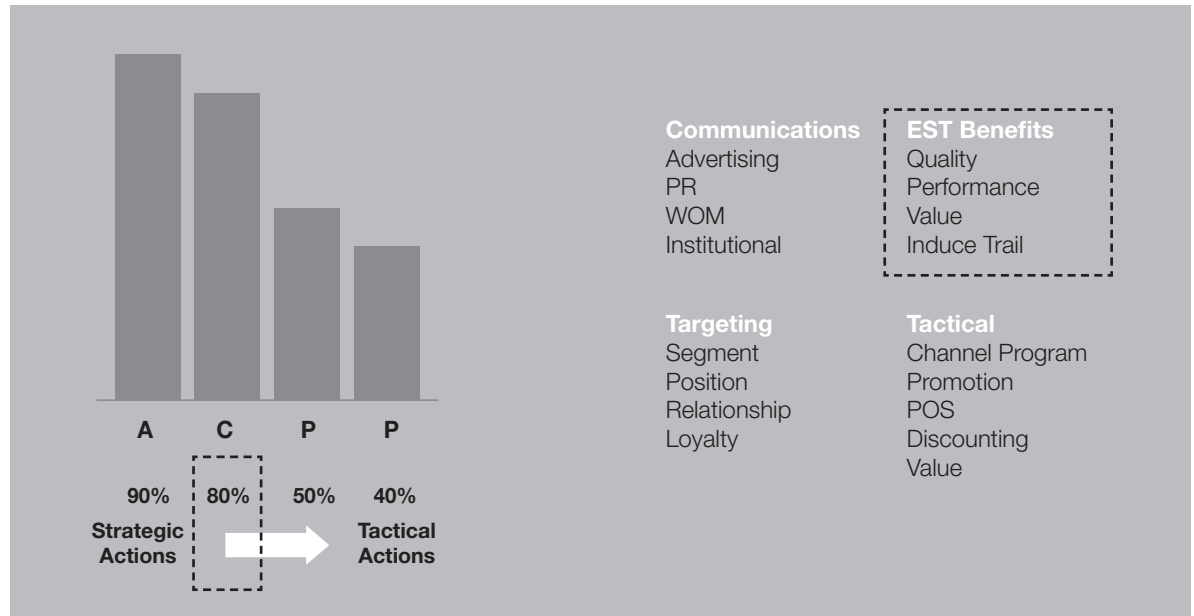
Figure 6: Trend Declination of ACPP: Low Consideration or Preference

(spiffs), enhanced merchandising and point-of-sale collateral, improved packaging for increased shelf impact and findability, and the use of periodic promotional or discount configurations to drive short-term sales.

Calibrating the Model's Predictive Capacity
The Socratic BPR index has been calibrated using more than 150 brand ratings collected through interviews with more than 25,000

individual ratings. The results have shown that a strong positive correlation exists between the BPR and the current market share for brands in their respective market categories.

The general model includes thousands of brand ratings from niche technology markets within both B2B and B2C applications, including office equipment, computer peripherals, consumer packaged goods, food

and liquor producers, retailers, airlines, quick service restaurants, mobile technology, personal computing devices, software and e-commerce sites.

The mathematical model providing best fit to the data is not linear, but rather curvilinear, showing that the greater the starting levels of BPR, the faster the gain in market share for further increasing BPR ratings [See Figure 8].

This also indicates the converse, that powerful brands have far more to lose if they do not defend their strong positions.

- In the Weak Range (BPR < 40, Nescient through Weak) the curve is inelastic; with each 5-point increase in BPR yielding a predicted average market share gain of only 1%.
- In the Mid-Range (BPR = 40 to 69, Entry through Influential), the curve is unitary elastic; with each 5-point change in BPR yielding a corresponding 5% average change in market share.
- And at the Strong Range of the scale (BPR ≥ 70, Dominant through Monopoly), the curve becomes highly elastic; with every 5-point change in BPR yielding a corresponding average change in market share of more than 12%.
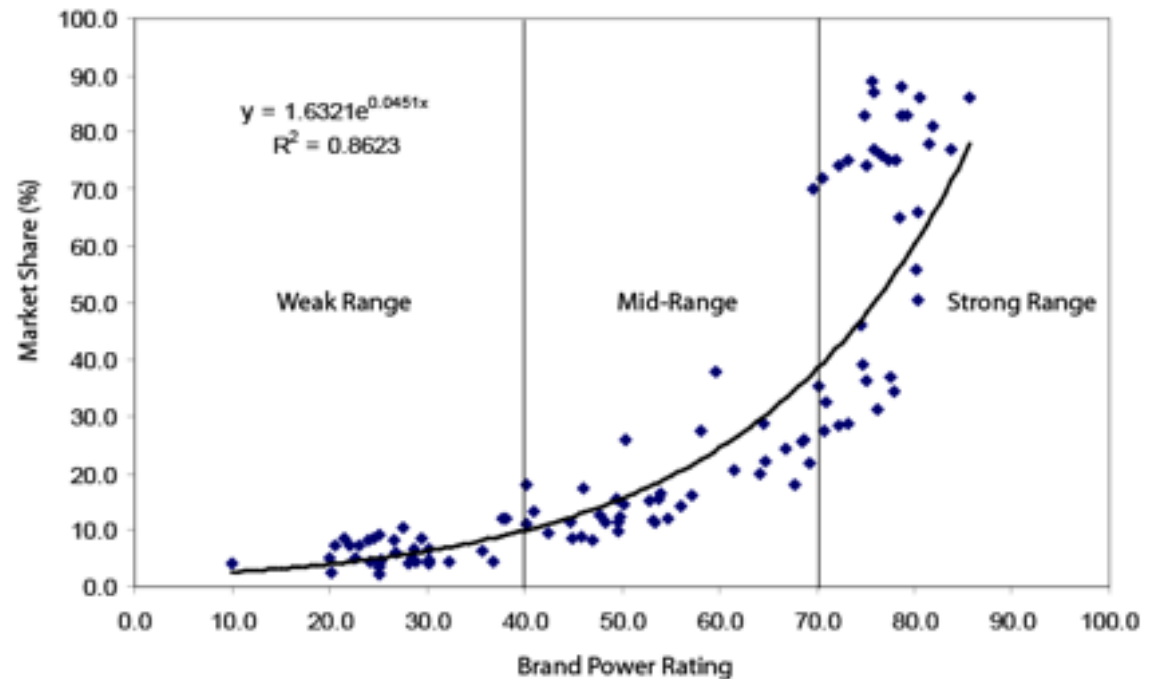
Figure 8: Relationship between Brand Power and Market Share

While the general model has a normatively high correlation coefficient ($R2 = 0.8623$); the individual niche markets tested have shown an average correlation of more than 0.900. This means that while BRP is generally applicable to the strength of brands across categories, it is even more helpful for understanding the competitive value of the sales funnel conversion rates within specific competitive environments.

Limits of the BPR Model Applicability
Although this model has shown to be remarkably robust—applying equally well

in both U.S. and European consumer and business technology markets—there have been several instances where problems have been associated with being able to accurately link the BPR to share estimates. These instances have been most profound in emerging markets (particularly in Asia) where several local issues appear to be at play.

First, the income gap between economic classes in many emerging regions appears to create a disconnect between the BPR and the actual share figures. This appears to be largely a function of the social desirability of owning relatively expensive Western brands, but without the wherewithal to fulfill those desires. In this case, people in some cultures will express positive attitudes towards a brand, leading to a very high calculated BPR, but much lower real market share than the model would predict.

Second, distribution problems for a brand's products outside of the regions where they are traditionally the strongest, can lead to lower-than-predicted share data due to the fact that in some areas people simply can't find the products of a brand that they would otherwise purchase. There are several instances where the brand activities to stimu-

late the sales funnel have worked extremely well, creating high levels of ACPP ratings, only to wind up losing share to other, less desirable, brands only because alternative brands are immediately available.

A final delimitation of the use of this model has to do with the concentration of competitors within a niche market. The model has an extremely high predictive capacity in markets where there are a few, very well-known competitors (oligopolistic markets) with a few lesser-known brands. However, when the markets are chaotic, with numerous lesser known brands in low-involvement categories (usually regional in nature), the BPR for the best known brands of the cohort tends to overstate the degree of share they actually possess. We attribute at least some of this phenomenon to brand confusion and poor memory regarding actual brands purchased.

Other Corroborating Sources
Other relevant work, from which the Socratic BPR has evolved, includes a number of studies and published works that have helped establish the basic underpinnings for our model and provide validation for the various applications of analysis. A few of these sources, which we would like to acknowledge, include the following references.

Scaling for the Sales Funnel Questions
A benchmark study of customer attitudes toward steel and branded steel products was conducted in 1996 by Wirthlin Worldwide. Four main goals and accompanying performance measures were defined and provided early scale validation on key components of a "sales funnel" measurement system:

1. Awareness:
Increase consumers' general awareness of steel, its uses, and advantages.
2. Favorability:
Increase overall positive perceptions of steel and steel products.
3. Attitude:
Increase positive perceptions of steel in comparison to the competition.
4. Behavior:
Translate changes in attitude to increased purchase of steel products, tracking key markets (automotive/housing).
(Cook, 1999, p. 59)

Interpreting the Impact of Trend Declination for the ACPP Component
Work on interpreting the relationship between consumer psychology during the purchase process and the role of the ACPP cycle, was explored by Chatterjee, Jauchius,

Kaas & Satpathy (2002). The focus on "how people buy" illuminates a common thought process that applies to many product and service categories.

Studies have shown that consumers move through the purchase process predictably. In choosing a car, for instance, they typically start by considering five or six models, adding some and dropping others as they proceed. The number of vehicles narrows as consumers move from awareness to familiarity to consideration to the test drive and, finally, to purchase. Brands pass through a "purchasing funnel" in which products are subjected to new requirements at every stage of the selection process. By crafting the brand-management effort to deal with these requirements as they unfold within each market segment, companies can overcome obstacles to purchase (p. 136).

In addition to establishing the brand bottlenecks (or areas of steep trend declination in our model) they also linked the diagnostics to elements of market action, which they refer to as "active brand management" exercises.

Consumer behavior may be strongly emotional, but influencing it takes data and

discipline. The purchasing funnel is a source of information about consumers and a device for interpreting it. Four phases of active brand management--the targeting of high-potential consumer segments, the isolation of purchase bottlenecks, the expansion of the range of consumer benefits, and a concentration on consumer touch points--rely on this data. (Chatterjee, Jauchius, Kaas & Satpathy, 2002, p 136)

Calibrating the Link between Sales Funnel Efficiency and Market Share

Working with another similar model (Millward Brown's BrandDynamics™ Pyramid), Hollis (2005) found that results from measuring the efficiency of this version of a "sales funnel" model have demonstrable return-on-investment implications:

Importantly, other research has demonstrated that the attitudinal equity measures reviewed here do relate to both behavioral and financial outcomes. Farr provides evidence that how well a brand converts consumers up the five levels [Awareness to Loyal Purchase] compared to other brands in the category has a relationship with market share change in the year following the survey (Farr, 1999). Muir builds on this analysis to show how this measure of brand momentum also

relates to revenue growth, profit growth, and shareholder value (Muir, 2005). That the framework does relate to behavioral and financial outcomes implies that the ability of online advertising to change the attitudinal relationship with a brand is not just nice to know, it has real implications for the bottom line.

Tying the results from sales funnel data to even broader measurements, like market capitalization of the brand's parent company has also been helpful in determining the overall applicability of this approach. Many studies and superb documentation have been offered by authors such as Gregory & Mcnaughton, (2004), discussing the models developed by the CoreBrand group.

Knowing the values of familiarity and favorability in the absence of corporate brand equity, we can determine minimum expected market capitalization at these base levels. To do this, we use our cash flow multiple model to determine how changes in familiarity and favorability affect the multiple. We again do multivariate analysis and include the remaining factors influencing stock price--cash flow growth, financial strength, price stability, earnings predictability, etc. This equation determines the cash flow multiple, the stock

price, and the subsequent market capitalization in the absence of corporate brand equity. Corporate brand equity is the difference between the current market capitalization and market capitalization at this base level.

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Brand Impact Study:
Expert Judges

B2C Expert Panel

Ben Bajarin
Consumer Technology and Digital Media
Analyst/Strategist, Creative Strategies

Since joining Creative Strategies in 2000, Ben has researched the global transition from analog to digital in consumer technologies and entertainment media. He has focused on projects and strategies in the emerging markets of the digital home ecosystem and the digital lifestyle, trying to understand how and why consumers will use new digital technologies in their everyday lives. His expertise is in understanding the Gen X and Millenial consumers and their present and future demands for technology. His research and strategic work spans digital entertainment and media, brand marketing and awareness, consumer products, and corporate social responsibility. Ben manages Creative Strategies' digital electronics and digital home research center where the impacts of many digital home and digital lifestyle technologies are studied. His current and past clients have included Sony, HP, Dell, Toshiba, Philips, Palm, and Microsoft, to name a few.

Ben started his career in technology in High School by creating a company that developed web based solutions for local business and consulted with them on how to use the Internet effectively as a sales and marketing tool. After college, he then went on to work at Cypress Semiconductor implementing web-based solutions to streamline inter-department communication and efficiency. After leaving Cypress, he joined Valley Credit Union as their webmaster tasked with developing and implementing their online banking strategy. After Valley CU, he joined a startup called WebAgencies and was the director of Internet Operations for 13 months before joining Creative Strategies.

B2C Expert Panel

Jason Pressman
Partner, Shasta Ventures

Jason Pressman focuses on investment opportunities in the technology-enabled services and software sectors for Shasta Ventures. Prior to joining Shasta Ventures, he was the fourth employee at Walmart.com, a venture-backed start-up where he was vice president of strategy, business development, and operations. In that role, Jason helped build the business into one of the leading commerce sites on the web.

Prior to Walmart.com, Jason served as an associate at Selby Venture Partners where he focused on services and software investments. Previously, he was an analyst and associate at Alex Brown in investment banking where he advised venture-backed start-ups on financings and merger and acquisitions.

Education: M.B.A., Stanford Graduate School of Business; B.S., Finance, University of Maryland

B2C Expert Panel

Marty Neumeier
President, Neutron

Marty Neumeier is president of Neutron, a design think tank in San Francisco. The firm's stated mission is to incite business revolution by unleashing the power of creative process.

Neutron mixes elements of management consulting, brand strategy, and communication design to provide the "glue" that holds brand teams together. This new role is made possible—and increasingly necessary—by the emergence of brand as an organizing principle in business. As brand-building becomes more distributed throughout a company, it takes more coordination between teams to build a coherent brand.

Neumeier began his career as a brand designer and later added writing and business strategy to his skills, working variously as a communications director, magazine publisher, and brand consultant. By the mid-1990s he had developed hundreds of brand identities and architectures for companies such as Apple, Adobe, Netscape, Kodak, and Hewlett-Packard. In 1996 he launched CRITIQUE, the magazine of design thinking, which quickly became the leading journal for improving design effectiveness through analysis and coaching. In editing CRITIQUE, Neumeier joined the growing conversation about bridging the gap between business strategy and customer experience, which led directly to the formation of Neutron and the ideas in his bestselling "whiteboard overview" books, THE BRAND GAP and ZAG. He currently serves as president of AIGA Center for Brand, for which he also edited THE DICTIONARY OF BRAND.

Neumeier now divides his professional life among three activities—consulting with corporate leaders, writing books on brand, innovation, and design, and developing workshops and brand programs for marketing professionals and Fortune 500 companies.

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B2B Expert Panel

Rob Enderle
President and Principal Analyst, Enderle Group

Rob is President and Principal Analyst of the Enderle Group, a forward-looking emerging technology advisory firm. Recognized as one of the best general Inquiry Analysts in the world, Rob specializes in providing rapid perspectives and suggested tactics and strategies to a large number of clients dealing with rapidly changing global events. Rob lives emerging technology and has a passion for personal technology and market strategy.

In addition, Rob writes for TechNewsWorld, DarkReading, Digital Trends, Tom's Hardware Guide, ITBusiness Edge, and Datamation. Rob appears regularly on WSJ Radio, CNBC, NPR, and Bloomberg Radio/TV.

Before founding the Enderle Group, Rob was the Senior Research Fellow for Forrester Research and the Giga Information Group. While there, he ran the eCommerce, Security, and Mobile research practices.

Before Giga, Rob was with Dataquest covering client/server software where he became one of the most widely publicized technology analysts in the world. Before Dataquest, Rob worked for IBM and was in IBM's executive resource program. As part of that program, he managed projects and people in Finance, Internal Audit, Competitive Analysis, Marketing, Security, and Planning. Prior to IBM he was a Marketing Director and sat on the board of the Southern California Marketing Director's Association.

Rob holds an AA in Merchandising, a BS in Business, and an MBA.

Rob sits on the advisory councils for Lenovo, Toshiba, AMD, HP, Dell, Philips, Trusted Computing Group, and the Lifeboat Foundation.

B2B Expert Panel

Charles King
President and Principal Analyst, Pund-IT

Charles King, Pund-IT's president and principal analyst, focuses on business technology evolution and interpreting the effects these changes will have on vendors, their customers, and the greater IT marketplace. Charles was a freelance writer in Silicon Valley for nearly a decade, working on technical, business, and strategy projects for Cisco Systems, Adobe Systems, SGI, and the Jet Propulsion Laboratory. He became an IT industry analyst in 1998.

Since founding Pund-IT in December 2004, Charles has produced regular commentaries in his newsletter, the Pund-IT Weekly Review, as well as numerous client projects. Charles has been quoted in media outlets, including the New York Times, the Washington Post, USAToday, Investor's Business Daily, Forbes, and the Financial Times, and on IT industry news sites such as CNET, InfoWorld, Internet News, eWeek, TechTarget, and eChannelLine.

B2B Expert Panel

Roy A. Young
President, MarketingProfs

Roy A. Young is dedicated to the mission of strengthening the business impact of marketing in organizations worldwide. As President of MarketingProfs, a cutting-edge learning organization with over 300,000 members – from Fortune 500 organizations to entrepreneurial start-up firms – he works to make marketers more influential and powerful. His pioneering book, Marketing Champions: Practical Strategies for Improving Marketing's Power, Influence, and Business Impact (John Wiley & Sons, 2006) has received praise from leading marketers, including Philip Kotler, Seth Godin, and Jack Trout, and leadership guru, Warren Bennis. His has worked with marketing executives from leading companies such as IBM, Microsoft, Wells Fargo, Visa, GE, and Johnson & Johnson, resulting in improved stature and value of marketing. Young gives presentations regularly through all leading marketing organizations such as the AMA, BMA, DMA, IIR, and MENG, and at universities such as ZBIS at Emory University, USC, UCLA and the Claremont Graduate School of Business. He has held high-level marketing and consulting positions at companies such as Time, Inc. and Yankelovich & Partners. Young earned an MBA in marketing from Stern School of New York University and lectures on marketing at UCLA and USC in Southern California.

B2B Expert Panel

William Ryan
Founding Partner, mandala

Turn-around strategist, brand architect, Internet pioneer. These are just some of the terms used to describe Bill Ryan. Over the past 20 years, he has played a major role in shaping many of the industry's major brands, such as IBM, Apple, Yahoo!, Documentum, Interwoven, Cognos, Informatica.

Large and small companies alike look to Ryan to help re-craft their company's story, create new positioning strategies, and transform their market presence. When Steve Jobs re-took Apple's helm, he called on Ryan and his agency to manage Apple's turnaround and to launch the iMac. When two Internet entrepreneurs at Stanford with a little search server call Yahoo.edu wanted to burst onto the national scene, they turned to Ryan and his team.

Having established a strong presence in the enterprise computing market of the early 90's, Ryan's public relations agency, Niehaus Ryan Wong (NRW), was among the first to start using online forums and the Internet to extend their clients' "field of influence" beyond traditional journalists and analysts. With their eyes keenly on the Net as it transitioned from a government and academic communications tool to a publishing and commerce platform, Ryan developed the first PR practice specializing in Internet communications, commerce, and technologies -- promoting early net icons such as Yahoo!, Global Network Navigator (GNN), Internet-In-A-Box, Spyglass, Virtual Vineyards, and Spry.

Today, Ryan is among a handful of marketing and business strategy professionals in the country with a deep understanding of both the technologies, applications, and services driving Global 2000 IT and the emerging technologies shaping consumer experiences in areas such as wireless, audio/video streaming, and digital entertainment.

Brand Impact Study:
Sponsors

Liquid Agency

Liquid Agency, a leading brand marketing firm based in Silicon Valley, started the Brand Impact Awards as a way to recognize the brands that create the most impactful and effective brand marketing programs.This initiative is part of Liquid Agency's commitment to furthering the strategic role of brands as a key element for long term business success.

Liquid Agency has worked with some of the world's best known technology brands including Adobe, Ask, Intuit, Microsoft, Sony, and Seagate, providing the strategy, design, and implementation of comprehensive brand marketing programs.

Liquid's services are designed to build brand awareness, differentiation, and preference, and include brand platform development, brand identity, advertising, packaging, Web and interactive services, and all types of marketing communications collateral.

For more information visit:
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Socratic Technologies

Socratic Technologies conducted the quantitative studies that were used to arrive at the Brand Impact Awards and developed the methodology that helped define the winning brands.

Socratic is a leader in the science of computer-based and Internet research methods. As a full-service marketing research agency, Socratic conducts global Web-based surveys, builds online panels, and performs Website usability evaluations for clients in the high technology, financial services, business to business, and consumer products sectors.

Socratic's proprietary tools and methodologies allow the design and implementation of custom research programs. Additionally, Socratic offers a full range of user experience test options, including one-on-one usability interviews and quantitative assessments. Socratic also manages its own database of pre-qualified online research participants, comprised primarily of IT and business decision-makers. Additionally, Socratic has a team of moderators with over 10 years of experience in qualitative research methodologies for domestic and international markets.

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