Brand Impact Report 2009

Table of Contents

Methodology Overview	3
Summary Overview	4
The Power Laws Are Holding By Marty Neumeier	9
Brands of the Year	12
Brand Impact Scores (Brands 1-276)	14
B2B Brand Impact Scores	20
B2C Brand Impact Scores	32
Methodology	54
Sponsors	65

The Brand Impact Report 2009

Every year, Liquid Agency publishes a report that chronicles the state of brands in the technology sector. The report is the result of our collaboration with Socratic Technologies, a leader in the science of computer-based and Internet research methods. This year, the report includes 240 brands in a wide berth of technology categories, ranging from social media to smartphones.

We like to share this report with our clients and friends, because we believe that it can be useful to assess how brands fare across the selling cycle, starting with awareness and ending with purchase intent. We also find it helpful to see how brands perform from year to year and in comparison to their competitors.

This year we've included an opinion by Marty Neumeier, the Director of Transformation at Liquid Agency, and the author of acclaimed books the likes of "ZAG" as well as "The Designful Company".

We hope you enjoy the report, and should you have any questions about it, please feel free to call me or send an email.

Sincerely,

Martha Bowman
Director of Brand Strategy
Liquid Agency

Methodology overview.

The Brand Impact Score is derived by combining two different metrics: Brand Reputation and Brand Power Rating ™ into a single score of 0 to 100. The Brand Reputation and Brand Power Rating are based on data collected from an online survey in May of 2009. Respondents were screened to be users of the categories in which they were surveyed. 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.

Brand Power Rating™.
The Brand Power Rating measures the power of a company's brand, through its marketing activities, specifically measuring awareness, consideration, preference and purchase intent (ACPP). The ACPP shows the brands 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 through the sales process. The Brand Power Rating is the average of the initial total awareness and the conversion rate of those aware who are converted 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 52 for a complete overview of the Brand Power Rating system, authored by Socratic Technologies.

Brand Reputation.
Brand Reputation is a quantitative assessment of consumer's perception 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.

Summary Overview

Strong brands enjoy a level of protection even in weak economy.

In a year that will go down in the books as one of unprecedented economic upheaval, plummeting stock prices and the collapse of the real estate market, it's amazing and satisfying (especially to those of us in the branding business) to know that strong brands are not only resilient, but can thrive in uncertain times. In 22 of the 32 categories tracked, the leading brand held or increased its Brand Power Rating in 2009. This tells us that leading brands even in the roughest times continue to directly influence customers and convert them to loyal, repeat buyers.

We may be spending less – but we are still willing to pay for brands that deliver quality and value.
While price was the most frequently cited reason businesses and consumers opted to switch from their preferred brand it was not the most important attribute driving purchase decisions. B2B buyers showed evidence of being especially loyal to the brands that delivered quality, reliability, value and honesty. In other words, when times are uncertain, we turn to brands we trust. Consumers were more willing than B2B buyers to trade off their preferred brand – but they still placed a higher priority on quality and value than on price alone.

Is there any more dynamic sector? We don't think so.
There is a handful of brand evaluation studies published annually but none are focused exclusively on the technology sector. That's what makes the Liquid Brand Impact Report a unique and an especially dynamic study. The speed of innovation in technology is unlike any other segment of business. New categories are created all the time. And brands that were born a few years ago in a Stanford or Harvard dorm room can go from nowhere to Top 10 in what feels like a blink of the eye. Consider the meteoric rise of Facebook. In 2007, the first year of the Liquid Brand Impact Report, Facebook was a distant third in a new category called social networking behind MySpace and YouTube. In 2007, Facebook ranked #85 (out of 129) in Brand Impact. Now just two years later, the brand that just surpassed its 350 millionth user has eclipsed every other brand in its category and ranks at #10 overall for Brand Impact, right behind Cisco and just ahead of Apple's iPod! Of course, the true test of a great brand is its ability to hold onto its power and remain relevant year in year out. We'll be watching Facebook .

Microsoft powers its way into more top spots.
This is the first year we've seen one company so dominate the Top 20 of the Brand Impact Report. Microsoft's halo effect is huge – allowing it garner instant awareness as it expands into new product segments. But what's noteworthy this year is that Microsoft is not only starting from a place of strength (high awareness) – it's converting more and more customers into purchasers. The brand took five top 20 spots for its Brand Impact in the following segments: Virtualization Software, CRM Software, Web Conferencing, Internet Browsers, and Enterprise Software.

Biggest movers.
Over the past year, new technology categories like Virtualization Software gained traction in the market with large increases in Brand Power (especially purchase intent) for all brands tracked. Other big movers up include: Webex and Adobe Connect in conferencing solutions, Symantec in enterprise software, Wii in gaming consoles and several enterprise storage brands that experienced sizable gains due to rebounds in purchase intent in 2009. Among the big movers in enterprise storage: Blue Arc, NetApp, Hitachi Data Systems, EMC, Sun and LSI.

Smart phones and their wireless service providers.
In the smart phone category, it's a two horse race for Brand Impact. In the business segment, we see iPhone increasing its Brand Power faster than the Blackberry. But in the consumer segment that's reversed with Blackberry increasing its Brand Power more than iPhone. Related are the wireless carrier findings. Here the battle is between Verizon and AT&T, the exclusive provider on the iPhone in the US. Last year's report had Verizon and AT&T in a dead heat. This year we see AT&T stumbling and Verizon gaining. Most concerning for AT&T should be the big drops in consideration and preference. Makes us wonder how bad it might be next year when the full effect of Verizon's "we have a map for that" campaign takes hold or if iPhone decides to cut a deal with multiple carriers, like it has in other countries.

Biggest Movers: B2B Categories

Category	Brand	Up	Brand	Down
Networking Devices	Juniper Networks	0.12	none	
CRM Software	Netsuite	0.24	none	
Virtualization Software	Redhat	0.37	none	
Conferencing Solutions	Webex	0.12	none	
Security Software	IBM	0.09	Symantec	0.06
Multimedia, Graphics, Publishing Software	Apple	0.07	Microsoft	0.01
Enterprise Storage	NetApp	0.28	none	
Servers	Fujitsu	0.1	none	
Semiconductors	Samsung	0.1	Marvell	0.11
Enterprise Software	Symantec	0.12	none	
Business Smartphone	iPhone	0.08	Nokia	0.09

Biggest Movers: B2C Categories

Category	Brand	Up	Brand	Down
Wireless Carriers	Verizon	0.03	Metro PCS	0.09
External Hard Drive	none		Iomega	0.13
HDTV	Samsung	0.02	Hitachi	0.09
Portable Media Players	Walkman	0.01	Samsung Yepp	0.14
Gaming Handheld	Nintendo DS	0.09	Gameboy	0.02
Gaming Consoles	Nintendo Wii	0.14	PlayStation 3	0.07
Bluetooth Headsets	Jawbone	0.19	Jabra	0.06
Video Game Publishers	Rockstar Games	13.02	Sega	13.02
Social Media Sites/Platforms	Facebook	0.29	MySpace	0.12
Consumer Smartphone	Blackberry	0.17	Motorola	0.06
Personal Computers	Lenovo	0.07	HP	0.03
Auxillary Devices	Phillips	0.07	Adaptec	0.11
Printers	Kodak	0.05	Brother	0.06
Wireless Networking Devices	Belkin	0.01	3Com	0.11
Internet Search Engine	Yahoo!	0.04	Ask.com	0.04
Internet Pure Play Shopping	Craigslist	0.07	Drugstore.com	0.14
Cable/Satellite Network Systems	DirecTV	0.03	Comcast	0.08
GPS	Tom Tom	0.15	Magellan	0.05
Home Media Hub Centers	n/a		n/a	
Personal Internet Security	n/a		n/a	
Internet Browsers	n/a		n/a	

Opinion:
The power laws are holding.
By Marty Neumeier

The power laws are holding.

In marketing, phenomena known as "power laws" account for the predictable distribution of market share among brands. One such law states that, in stable markets, the number-one brand in a category will command twice the market share (or dollar share, or attention share) of the number-two brand, which will command twice the share of the number-three brand, which will command twice the share of the number-four brand, and so on, until there's no market left to share. So in a stable category we might expect to see a distribution something like 50-25-12-6-3 and so on, dwindling down to zero.

Clearly, because of this doubling and halving effect, it pays to be closer to the top than the bottom. Power laws give us the math behind why the rich get richer. The Brand Power Rating™, as measured in our survey, is a brand's ability to convert a strong market position into sales, moving from brand awareness to purchase intent without losing share from one end of the sales funnel to the other.

But if power laws work best in a stable market, what happens when the market isn't stable? When the tech sector is innovating like crazy, for example? Or when financial markets are collapsing around us like a house of cards?

Judging by this year's Brand Impact Study, the power laws are holding. The rich are getting richer by using their clout to leverage into new categories where they can be number one or number two, or by muscling out companies lower down the ladder who don't have the resources or brand loyalty to withstand the economic crisis.

A good example of this is Google, our Overall Brand of the Year for the second time in three years. Google was first into people's minds with a superior search engine (way back in 1998), but by sticking to its mission and cementing its lead, the company can now contemplate an assault on the highly competitive smart phone market.

Another example is Microsoft, which this year took five of the twenty top slots for Brand Impact. The company used its massive momentum and deep pockets to push into new areas such as virtualization software, CRM, and even search engines—with immediate brand effect. It will be interesting see how Microsoft's Bing will stack up against Google's search engine over time. If the power laws continue to hold, it could end up with a market share half the size of Google's.

What's surprising is that, until recently, Microsoft had been known as a laggard in creating brand value. In 2003, Interbrand's Top 100 Brands showed the company's brand value at only 17% of its market cap, while Apple's brand value (to compare apples with oranges) was at 67% of its market cap. Microsoft had a lot of room for improvement, and they appear to be picking up the slack.

As further evidence that power laws are still in effect, the leading brand in 22 of our 32 categories either maintained or increased its Brand Power Rating. A ratio of 22/32 is a remarkable batting

average in a sector where fortunes rise and fall with every new technology. But a ratio of 22/32 is also a ratio of 10/22, since 10 of our 32 brands did NOT maintain their leads. A vivid example of how quickly the tables can turn in the technology sector is Nintendo. They were given up for dead until they launched Wii. This year they rank seventh on our top 20 technology brands, with Xbox and PlayStation scrambling to catch up. The lead is now theirs to lose.

Interestingly, B2B brands fared better than B2C brands during the downturn. Why? Because consumers can switch brands easily as they become more price-sensitive—after all, they can re-assert their loyalty anytime and pick up where they left off. In contrast, B2B customers may find the switching costs—both financial and psychological—too high to consider. Our research showed that many B2B buyers continued to value quality, reliability, value, and honesty more than price. Examples are Adobe, HP, Cisco, Intel, Symantec, and Dell. Once again the leading brands remained the leading brands.

But what do power laws and Brand Impact predict for 2010? Which brands will be winners, and which will be losers as we pull out of the recession? Booting up the crystal ball, six predictions come into focus.

1. Companies that have managed their brands judiciously—minding the store, building customer loyalty, finding efficiencies, conserving cash—can look forward to some great brand-building opportunities in 2010. Oracle's acquisition of Sun and Apple's purchase of Lala offer a glimpse of things to come.

2. Companies that downsized while focusing rigorously on a compelling differentiator will come back stronger than those who simply scrambled for sales to survive the storm. Samsung used the downturn to refocus, reorganize, and redouble their efforts to lead through design.

3. "Authentic" brands—those that customers believe are honest, real, courageous, creative, or passionate—will continue to gain favor in an increasingly transparent world. The success of the online shoe store, Zappos, demonstrates how social media can drive customer loyalty and increase brand value.

4. Brands with great "stories" will cut through the clutter and noise of the market upturn. The Jawbone headset from Aliph beats the noise in more than one way. Its NoiseAssassin technology leads the pack in noise cancellation, and it's "Earcandy" design concept—from noted designer Yves Behar—is unabashed in its focus on fashion as a differentiator.

5. Companies that learn to manage innovation from within will enjoy greater agility than those who outsource most of their innovation. Apple, Google, and HP will continue to show the way.

6. Companies that make the most of "green" opportunities will find themselves on the winning side of a growing gap between old technology and new technology. Look for traction from Tesla (yes, a technology company), Applied Materials (with a growing investment in solar), and GE (with its "ecomagination" initiative). The movement towards "dematerializing" products (think Amazon Kindle) is building up steam, and 2010 will bring many new versions of this concept.

Stepping back, we may well see 2009 as the year when top-down, spreadsheet-driven, industrial-age styles of management finally sputtered to a halt, clearing the way for a lighter, more creative, more socially responsible approach to building companies and their brands.

One final prediction: The power laws of marketing will still separate the winners from the losers.

Marty Neumeier
Director of Transformation
Liquid Agency

2009 Winners:
B2C Brand of the Year
B2B Brand of the Year
Overall Brand of the Year

The Winners in 2009.

The overall Brand of the Year is awarded to the single brand (B2B and B2C) with the highest Brand Impact Score. Breaking into the top tier of the list is tough because great brands have worked for years to gain our trust and loyalty. So this year we see past winners, Google and Amazon trading places in the rankings and one brand, Microsoft taking top honors for the first time.

Top Brand Impact Scores

Google	Search Engine	0.8928
Amazon	Internet Pure Play Shopping	0.8734
Microsoft	Virtualization Software	0.8732
Adobe	Multimedia, Graphics & Publishing Software	0.8595
Microsoft	CRM Software	0.8474

B2C Brand of the Year

Google™

B2B Brand of the Year

Microsoft®

Overall Brand of the Year

Google™

Brand Impact Scores: Comprehensive list

Brand		Category	Brand Impact Score
1.	Google	Search Engines	0.8928
2.	Amazon	Pure Play Shopping	0.8734
3.	Microsoft	Virtualization	0.8732
4.	Adobe	Multimedia	0.8595
5.	Microsoft	CRM	0.8474
6.	Intel	Semiconductors	0.8471
7.	Nintendo Wii	Gaming Consoles	0.8256
8.	Live Meeting	Conferencing	0.8192
9.	Cisco	Networking Devices	0.8156
10.	Facebook	Social Media	0.8131
11.	Apple iPod	Portable Media Players	0.8104
12.	HP	Enterprise Storage	0.8103
13.	Blackberry	Business Smartphone	0.8047
14.	Internet Explorer	Internet Browsers	0.8033
15.	Garmin	GPS	0.8007
16.	IBM	Enterprise Storage	0.8007
17.	Nintendo DS	Gaming Handheld	0.7991
18.	Nintendo	Video Game Publishers	0.7985
19.	Microsoft	Enterprise Software	0.7894
20.	Oracle (Siebel)	CRM	0.7890
21.	HP	Printers	0.7813
22.	Dell	Servers	0.7591
23.	Motorola	Bluetooth Headsets	0.7565
24.	HP	Servers	0.7496
25.	Dell	Enterprise Storage	0.7387
26.	Linksys	Wireless Networking Devices	0.7330
27.	IBM	Servers	0.7317
28.	Microsoft	Video Game Publishers	0.7308
29.	TIVO	Media Hub Devices	0.7299
30.	Logitech	Auxiliary/Peripheral	0.7263

Brand		Category	Brand Impact Score
31.	Sony	HDTV	0.7219
32.	IBM	Enterprise Software	0.7215
33.	HP	Networking Devices	0.7214
34.	EA	Video Game Publishers	0.7196
35.	Sony	Video Game Publishers	0.7137
36.	Play Station PSP	Gaming Handheld	0.7128
37.	XBOX 360	Gaming Consoles	0.7126
38.	Play Station 3	Gaming Consoles	0.7102
39.	Dell	PCs	0.7055
40.	SAP	CRM	0.7031
41.	Blackberry	Smartphone	0.7018
42.	Microsoft	Multimedia	0.6989
43.	Norton	Personal Internet Security	0.6851
44.	HP	PCs	0.6848
45.	Symantec	Security	0.6832
46.	Webex	Conferencing	0.6815
47.	eBay	Pure Play Shopping	0.6794
48.	HP	Enterprise Software	0.6794
49.	Sun	Enterprise Storage	0.6750
50.	Apple iPhone	Business Smartphone	0.6718
51.	Sun Solaris	Virtualization	0.6715
52.	Texas Instruments	Semiconductors	0.6712
53.	AMD	Semiconductors	0.6696
54.	Apple iPhone	Smartphone	0.6677
55.	Verizon	Wireless Carriers	0.6674
56.	VMware	Virtualization	0.6645
57.	Yahoo!	Search Engines	0.6638
58.	Firefox	Internet Browsers	0.6624
59.	Sony	Semiconductors	0.6599
60.	McAfee	Security	0.6591

Brand	Category	Brand Impact Score
61. Redhat	Virtualization	0.6587
62. Mcafee	Personal Internet Security	0.6587
63. Gameboy	Gaming Handheld	0.6556
64. MySpace	Social Media	0.6546
65. Microsoft	Auxiliary/Peripheral	0.6531
66. Cisco	Enterprise Software	0.6495
67. Oracle	Enterprise Software	0.6475
68. Novell	Virtualization	0.6425
69. Lotus Sametime	Conferencing	0.6322
70. Tom Tom	GPS	0.6252
71. Samsung	Semiconductors	0.6210
72. Western Digital	External Hard Drives	0.6164
73. Canon	Printers	0.6163
74. HP	Auxiliary/Peripheral	0.6148
75. Adobe Connect	Conferencing	0.6144
76. Youtube	Social Media	0.6125
77. Telepresence	Conferencing	0.6115
78. Sony	Auxiliary/Peripheral	0.6111
79. Samsung	HDTV	0.6027
80. AT&T	Wireless Carriers	0.6004
81. Microsoft	Security	0.5976
82. Direct TV	Cable/Sat	0.5924
83. Corel	Multimedia	0.5911
84. Salesforce	CRM	0.5896
85. Dell	External Hard Drives	0.5888
86. Lexmark	Printers	0.5858
87. Apple	Multimedia	0.5801
88. Motorola	Business Smartphone	0.5795
89. Linksys	Media Hub Devices	0.5744
90. Toshiba	Semiconductors	0.5734

Brand	Category	Brand Impact Score
91. HP Halo	Conferencing	0.5734
92. Dell	Enterprise Software	0.5718
93. Netsuite	CRM	0.5713
94. SAP	Enterprise Software	0.5699
95. Symantec	Enterprise Software	0.5689
96. Seagate	External Hard Drives	0.5679
97. GoToMeeting	Conferencing	0.5675
98. Panasonic	HDTV	0.5670
99. Sega	Video Game Publishers	0.5670
100. Sony Walkman	Portable Media Players	0.5659
101. Magellan	GPS	0.5656
102. Symantec	Personal Internet Security	0.5639
103. Hitachi Data System	Enterprise Storage	0.5614
104. EMC	Enterprise Storage	0.5568
105. Apple	PCs	0.5545
106. Slingbox	Media Hub Devices	0.5525
107. Rockstar Games	Video Game Publishers	0.5487
108. Activision	Video Game Publishers	0.5478
109. Overstock	Pure Play Shopping	0.5438
110. Compaq	PCs	0.5438
111. Cisco	Security	0.5420
112. Fujitsu	Enterprise Storage	0.5391
113. LG	Smartphone	0.5360
114. Sun	Servers	0.5351
115. Palm	Business Smartphone	0.5339
116. Sharp	HDTV	0.5305
117. Craigslist	Pure Play Shopping	0.5299
118. LG	HDTV	0.5293
119. LG	Business Smartphone	0.5281
120. Gateway	PCs	0.5273

Brand	Category	Brand Impact Score
121. Sage Software	CRM	0.5252
122. Motorola	Smartphone	0.5221
123. IBM	Auxiliary/Peripheral	0.5214
124. Nortel Networks	Networking Devices	0.5211
125. MSN	Search Engines	0.5191
126. iTouch	Gaming Handheld	0.5169
127. Qualcomm	Semiconductors	0.5144
128. XenSource	Virtualization	0.5138
129. Twitter	Social Media	0.5131
130. Nokia	Bluetooth Headsets	0.5091
131. Epson	Printers	0.5059
132. Ask.com	Search Engines	0.5051
133. Apple	Auxiliary/Peripheral	0.5041
134. Samsung	Smartphone	0.5022
135. Kodak	Printers	0.5022
136. NetGear	Wireless Networking Devices	0.5021
137. Archos	Portable Media Players	0.5021
138. Sony	PCs	0.5004
139. IBM	Security	0.4992
140. T-Mobile	Wireless Carriers	0.4950
141. Samsung	Bluetooth Headsets	0.4931
142. Konami	Video Game Publishers	0.4931
143. Comcast	Cable/Sat	0.4918
144. Verisign	Security	0.4917
145. Microsoft Zune	Portable Media Players	0.4889
146. Parallels	Virtualization	0.4871
147. NetApp	Enterprise Storage	0.4857
148. Apple TV	Media Hub Devices	0.4853
149. Samsung	Business Smartphone	0.4842
150. Netflix	Pure Play Shopping	0.4842

Brand	Category	Brand Impact Score
151. Nokia	Business Smartphone	0.4836
152. Phillips	HDTV	0.4833
153. Broadcom	Semiconductors	0.4825
154. Trend Micro	Security	0.4816
155. Nokia	Smartphone	0.4814
156. Sony Ericsson	Bluetooth Headsets	0.4750
157. Toshiba	PCs	0.4749
158. THQ	Video Game Publishers	0.4749
159. Sprint	Wireless Carriers	0.4735
160. Belkin	Wireless Networking Devices	0.4674
161. MediaPoint	Media Hub Devices	0.4656
162. Timewarner	Cable/Sat	0.4654
163. Palm	Smartphone	0.4648
164. Ubisoft	Video Game Publishers	0.4639
165. Phillips	Auxiliary/Peripheral	0.4595
166. T-Mobile G1	Business Smartphone	0.4578
167. iTunes	Pure Play Shopping	0.4514
168. Freescale	Semiconductors	0.4513
169. Plantronics	Bluetooth Headsets	0.4462
170. Juniper Networks	Networking Devices	0.4434
171. RealPresence	Conferencing	0.4353
172. Jawbone (Aliph)	Bluetooth Headsets	0.4338
173. Echostar Dish Network	Cable/Sat	0.4276
174. Amdocs	CRM	0.4273
175. Olive Media	Media Hub Devices	0.4263
176. T-Mobile G1	Smartphone	0.4260
177. Kapersky Lab	Security	0.4220
178. Flickr	Social Media	0.4216
179. Quark	Multimedia	0.4208
180. Avaya	Networking Devices	0.4204

Brand	Category	Brand Impact Score
181. Sandisk Sansa	Portable Media Players	0.4173
182. D-Link	Wireless Networking Devices	0.4172
183. Vizio	HDTV	0.4170
184. AOL	Search Engines	0.4168
185. Brother	Printers	0.4163
186. Marvell	Semiconductors	0.4152
187. Creative Zen	Portable Media Players	0.4145
188. LSI	Semiconductors	0.4064
189. Linked In	Social Media	0.3973
190. Hitachi	HDTV	0.3947
191. Hynix	Semiconductors	0.3919
192. VirtualLive	Conferencing	0.3918
193. Jabra	Bluetooth Headsets	0.3900
194. JVC	HDTV	0.3856
195. Experia	Conferencing	0.3845
196. Fujitsu	Servers	0.3840
197. CA	Enterprise Software	0.3830
198. Pinnacle	Multimedia	0.3820
199. Creative	Auxiliary/Peripheral	0.3818
200. Drugstore.Com	Pure Play Shopping	0.3801
201. CA	Security	0.3789
202. Xilinx	Semiconductors	0.3771
203. LSI	Enterprise Storage	0.3739
204. Blue Arc	Enterprise Storage	0.3734
205. Altec Lansing	Auxiliary/Peripheral	0.3703
206. Bungie Studios	Video Game Publishers	0.3689
207. Sonos Digital	Media Hub Devices	0.3688
208. Buy.Com	Pure Play Shopping	0.3630
209. 1-800-Flowers	Pure Play Shopping	0.3619
210. Acer	PCs	0.3585

Brand	Category	Brand Impact Score
211. Belkin	Auxiliary/Peripheral	0.3576
212. ST Electronics	Semiconductors	0.3549
213. Checkpoint	Security	0.3546
214. RSA Security	Security	0.3496
215. 2Wire	Wireless Networking Devices	0.3479
216. NXP	Semiconductors	0.3464
217. JBL	Auxiliary/Peripheral	0.3439
218. Trend Micro	Personal Internet Security	0.3422
219. EMC	Enterprise Software	0.3411
220. DELL	HDTV	0.3373
221. Vivendi Games	Video Game Publishers	0.3373
222. Newegg	Pure Play Shopping	0.3320
223. VUDU	Media Hub Devices	0.3301
224. Business Objects	Enterprise Software	0.3295
225. BEA	Enterprise Software	0.3273
226. Microstrategy	Enterprise Software	0.3231
227. Fujitsu	External Hard Drives	0.3231
228. Renesas (n)	Semiconductors	0.3223
229. Pillar	Enterprise Storage	0.3190
230. Cognos	Enterprise Software	0.3188
231. Take 2 Interactive	Video Game Publishers	0.3171
232. MIO	GPS	0.3110
233. Google Chrome	Internet Browsers	0.3086
234. Friendster	Social Media	0.3077
235. HP	HDTV	0.3074
236. Blogger	Social Media	0.3052
237. Shutterfly	Pure Play Shopping	0.3033
238. Hitachi	External Hard Drives	0.3016
239. Cox Enterprises	Cable/Sat	0.3014
240. Virgin	Wireless Carriers	0.2917

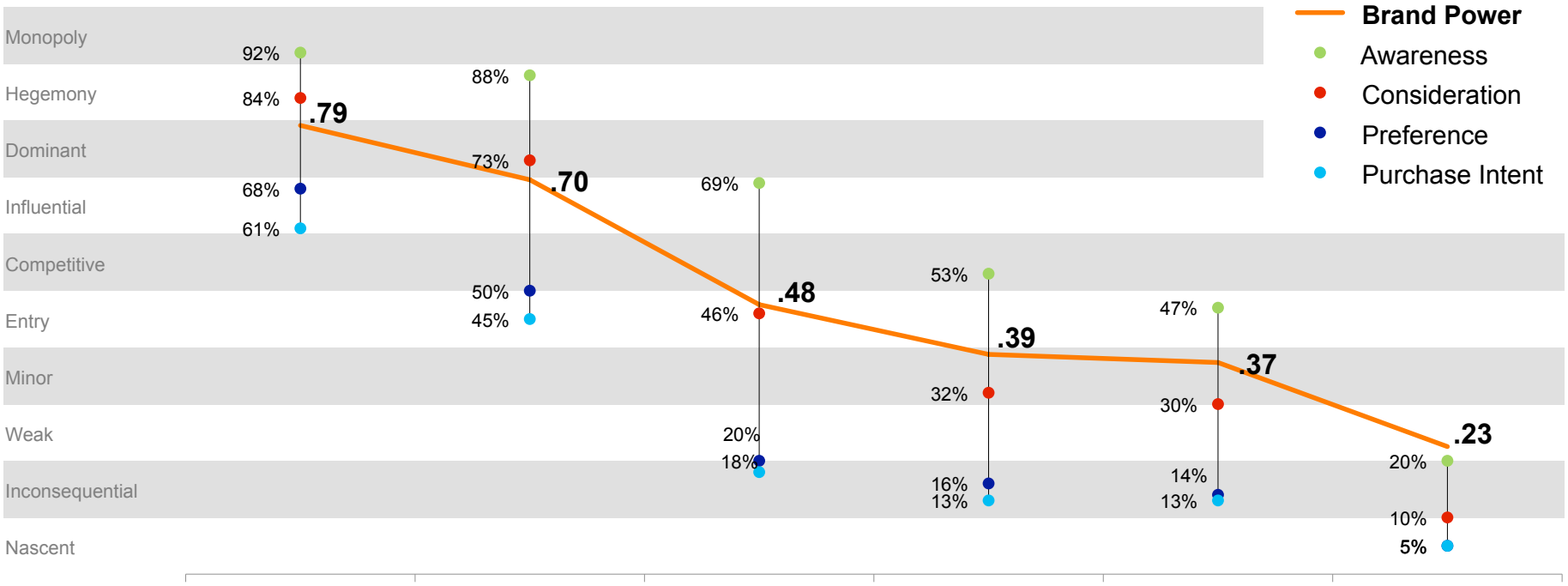
Brand	Category	Brand Impact Score
241. Westinhouse	HDTV	0.2899
242. Redback	Networking Devices	0.2850
243. Iomega	External Hard Drives	0.2828
244. Kapersky	Personal Internet Security	0.2774
245. Stumbleupon	Social Media	0.2771
246. Lifelock	Personal Internet Security	0.2768
247. Digg	Social Media	0.2757
248. Apple Airport	Wireless Networking Devices	0.2737
249. NEC/Mitsubishi	Auxiliary/Peripheral	0.2723
250. Cablevision Systems	Cable/Sat	0.2722
251. Lenovo	PCs	0.2677
252. Kensington	Auxiliary/Peripheral	0.2677
253. Fuji	Printers	0.2672
254. Webroot	Personal Internet Security	0.2653
255. Charter Cable	Cable/Sat	0.2642
256. 3Com	Wireless Networking Devices	0.2546
257. US Cellular	Wireless Carriers	0.2493
258. Safari	Internet Browsers	0.2360
259. Codemaster	Video Game Publishers	0.2331
260. Adaptec	Auxiliary/Peripheral	0.2270
261. TIBCO	Enterprise Software	0.2263
262. Zone Alarm	Personal Internet Security	0.2213
263. Lawrence	GPS	0.2212
264. Fellowes	Bluetooth Headsets	0.2195
265. del.icio.us	Social Media	0.2172
266. Buffalo	Wireless Networking Devices	0.2169
267. Samsung Yepp	Portable Media Players	0.2151
268. Buffalo	External Hard Drives	0.2120
269. Fujitsu	PCs	0.2099
270. Kyocera	Bluetooth Headsets	0.2045

Brand	Category	Brand Impact Score
271. iRiver Clix	Portable Media Players	0.1982
272. Metro PCS	Wireless Carriers	0.1949
273. Second Life	Social Media	0.1767
274. Yelp	Social Media	0.1724
275. Ning	Social Media	0.1577
276. StubHub	Pure Play Shopping	0.1237

Brand Impact Scores:
B2B Categories Detail

Category: Networking Devices

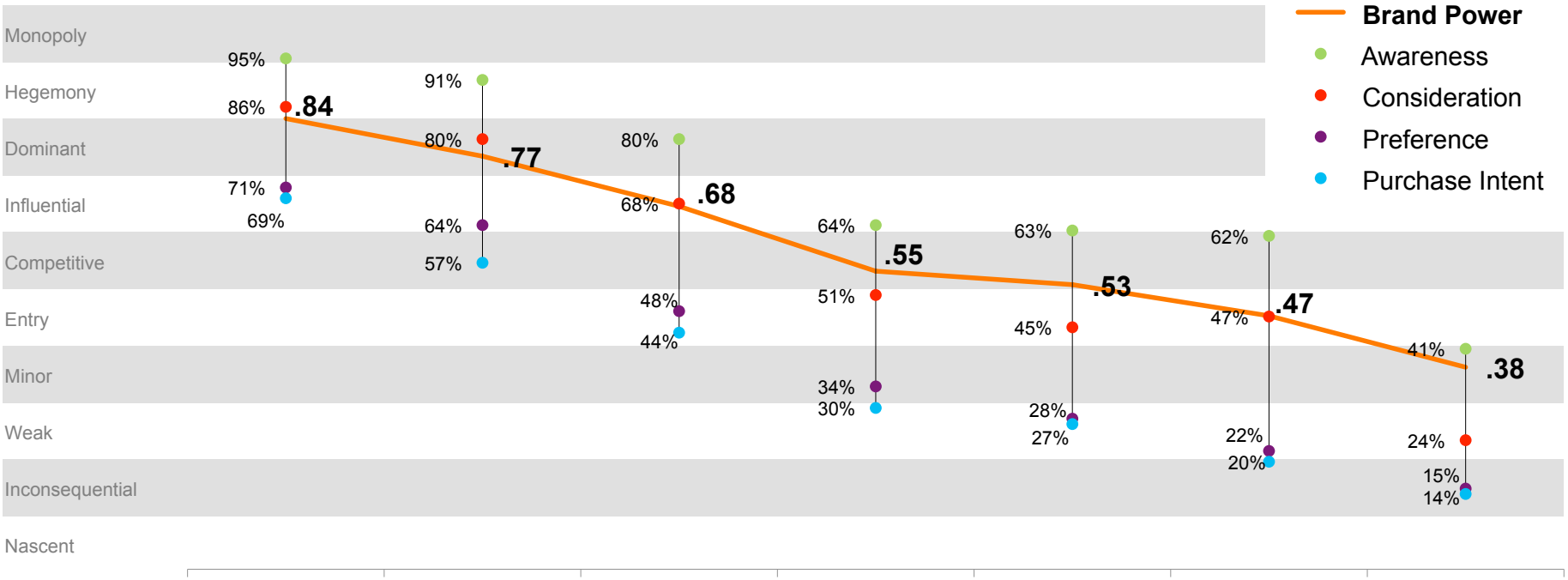
Winner: **Cisco**



	CISCO	HP	Nortel Networks	Juniper Networks	Avaya	Redback
Brand Power Trend						
2008-'09	↓-0.05	↓-0.09	↓-0.05	↓-0.12	↓-0.07	↓-0.09
2007-'08	↓-0.12	–	↑0.23	↑0.26	↑0.24	↑0.10
Brand Reputation	**95**	**87**	**78**	**76**	**69**	**63**
Brand Impact	**.82**	**.72**	**.52**	**.44**	**.42**	**.29**

Category: CRM Software

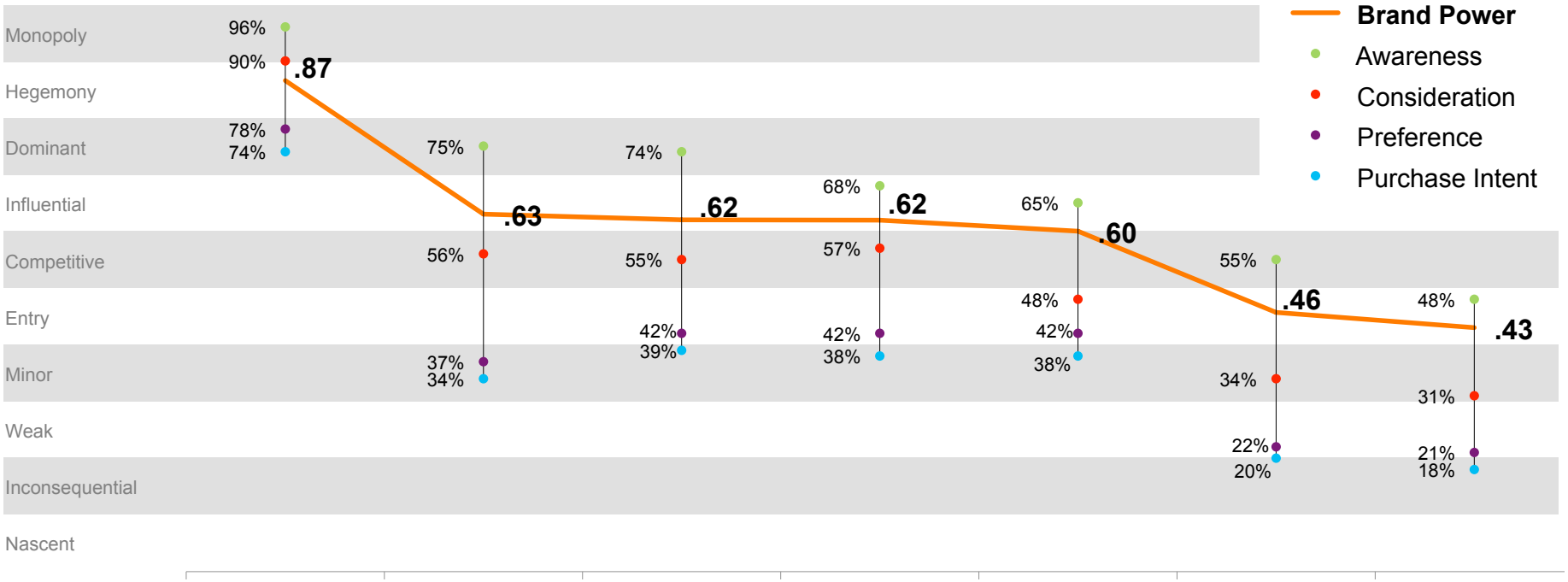
Winner: **Microsoft**



	Microsoft	Oracle (Siebel)	SAP	Salesforce	Netsuite	Sage Software	Amdocs
Brand Power Trend							
2008-'09	↑0.09	↑0.11	↑0.13	↑0.10	↑0.24	↑0.13	–
2007-'08	–	↓-0.18	–	↓-0.02	↓-0.24	↓-0.22	–
Brand Reputation	**90**	**91**	**86**	**79**	**81**	**83**	**72**
Brand Impact	**.85**	**.79**	**.70**	**.59**	**.57**	**.53**	**.43**

Category: Virtualization Software

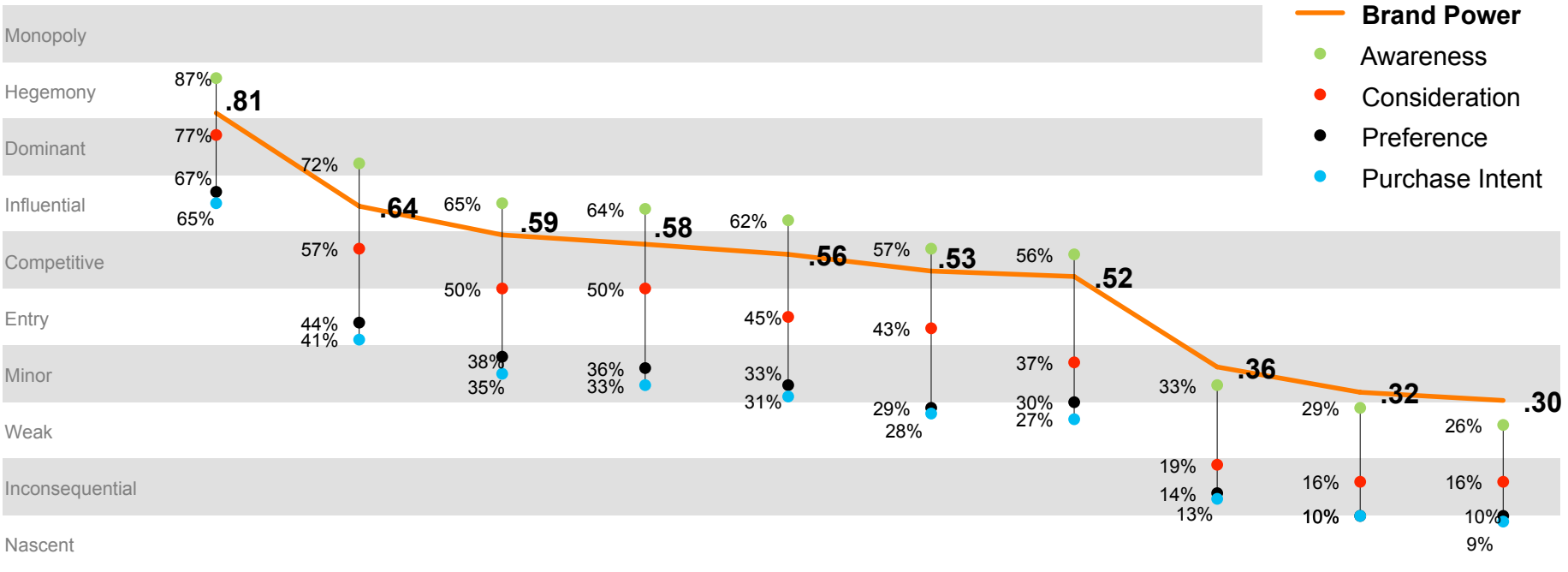
Winner: **Microsoft**



	Microsoft	Novell	Sun Solaris	VMware	Redhat	XenSource	Parallels
Brand Power Trend							
2008-'09	↑0.35	↑0.29	↑0.30	↑0.37	↑0.29	↑0.28	↑0.30
2007-'08	–	–	–	–	–	–	–
Brand Reputation	**92**	**89**	**92**	**89**	**87**	**84**	**82**
Brand Impact	**.87**	**.67**	**.66**	**.66**	**.64**	**.51**	**.49**

Category: Conferencing Solutions

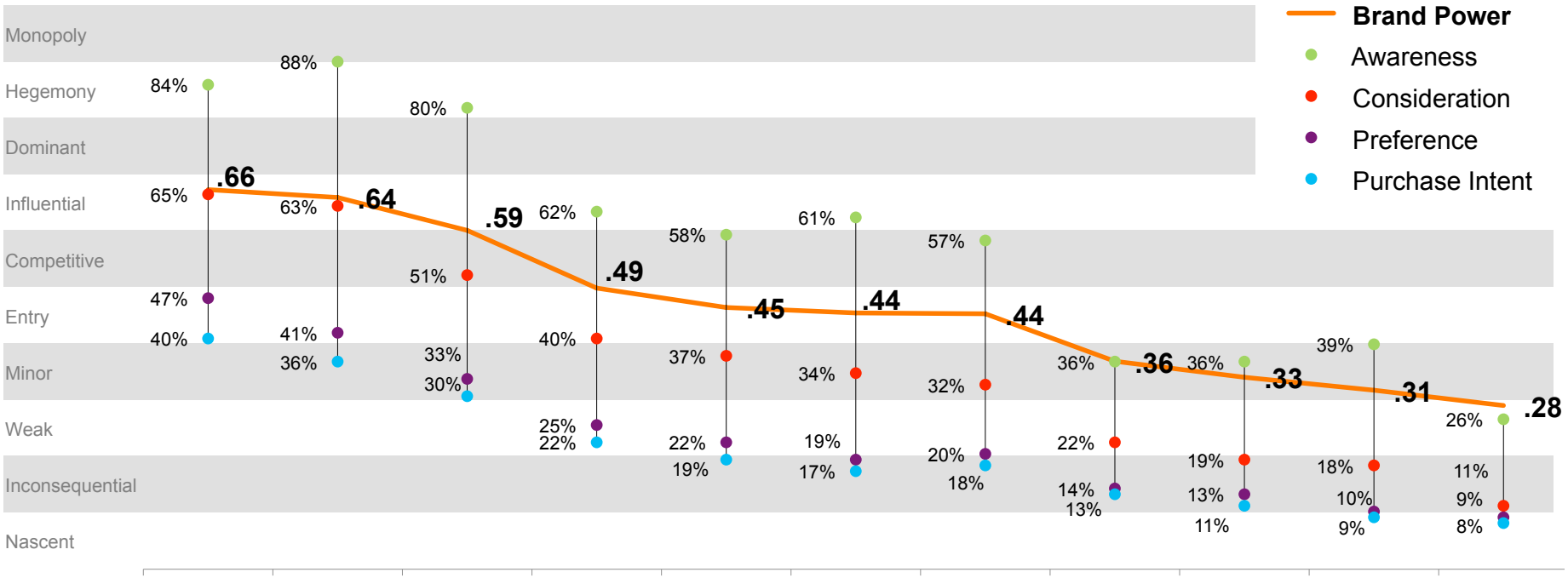
Winner: **Live Meeting**



	Live Meeting	Webex	Lotus Sametime	Adobe Connect	Telepresence	HP Halo	GoTo Meeting	RealPresence	VirtualLive	Experia
Brand Power Trend										
2008-'09	↑0.27	↑0.33	–	↑0.28	–	–	–	↑0.19	–	–
2007-'08	↓-0.20	↓-0.14	–	↓-0.28	–	–	–	↓-0.14	–	–
Brand Reputation	**88**	**89**	**85**	**82**	**90**	**82**	**83**	**85**	**81**	**85**
Brand Impact	**.82**	**.68**	**.63**	**.61**	**.61**	**.57**	**.57**	**.44**	**.39**	**.38**

Category: Security Software

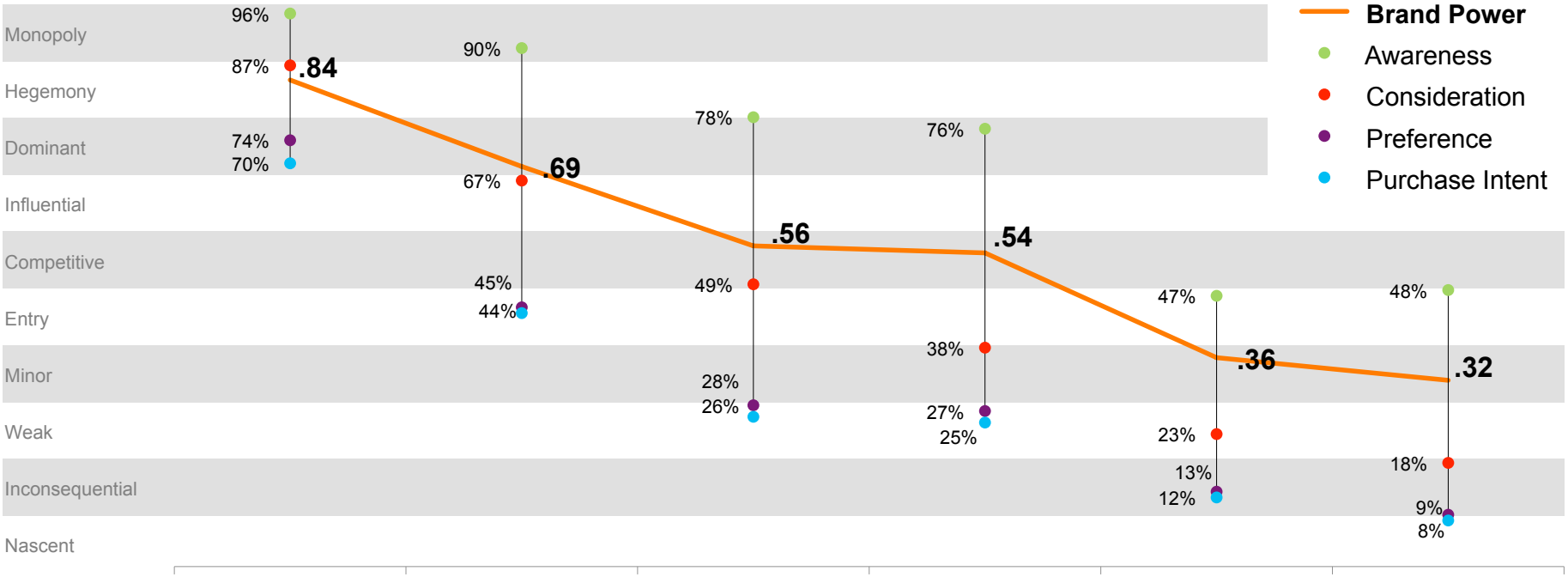
Winner: **Symantec**



	Symantec	McAfee	Microsoft	Cisco	IBM	Verisign	Trend Micro	Kapersky Lab	CA	Checkpoint	RSA Security
Brand Power Trend											
2008-'09	↓-0.06	↓-0.02	↑0.05	↓-0.06	↑0.09	↓-0.01	–	–	↑0.01	↓-0.08	–
2007-'08	↓-0.04	↓-0.05	–	–	–	↑0.05	–	–	↑0.04	–	–
Brand Reputation	**83**	**74**	**65**	**85**	**76**	**70**	**76**	**77**	**64**	**60**	**72**
Brand Impact	**.68**	**.66**	**.60**	**.54**	**.50**	**.49**	**.48**	**.42**	**.38**	**.35**	**.35**

Category: Multimedia, Graphics Publishing Software

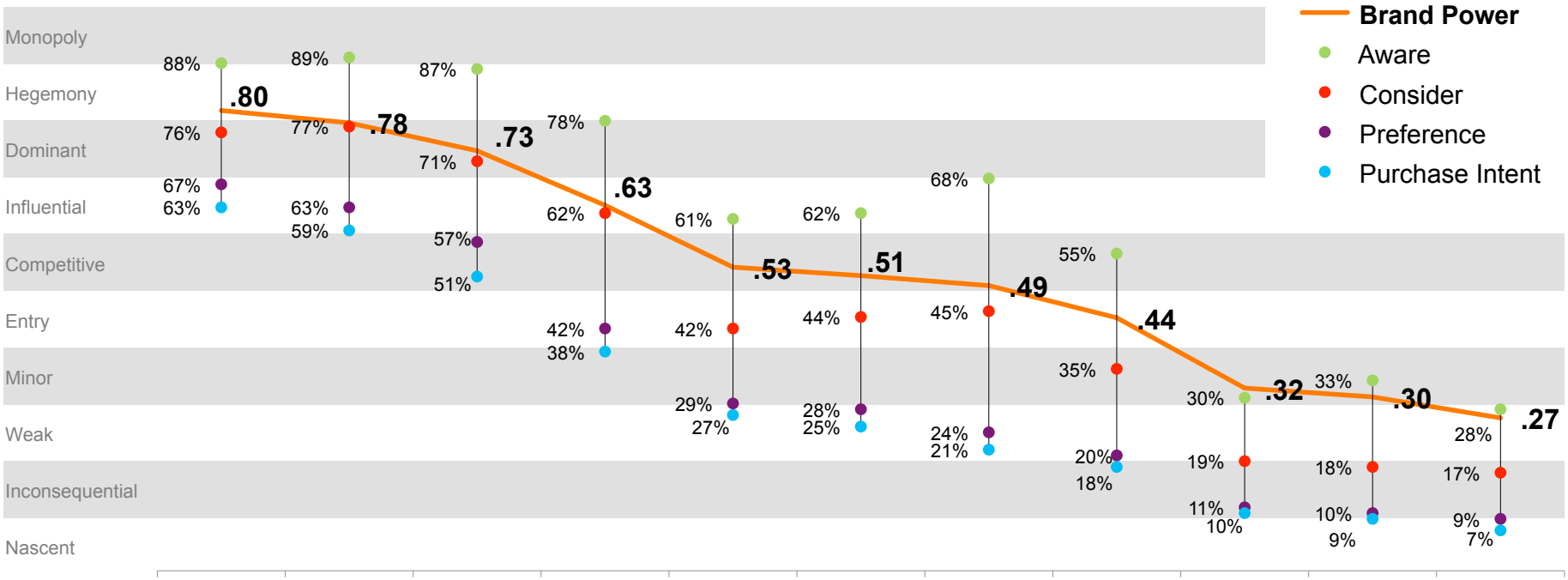
Winner: **Adobe**



	Adobe	Microsoft	Corel	Apple	Quark	Pinnacle
Brand Power Trend						
2008-'09	↑0.01	↓-0.01	↑0.03	↑0.07	↑0.03	↑0.02
2007-'08	↑0.01	↓-0.03	↓-0.05	↓-0.02	↑0.01	–
Brand Reputation	**94**	**72**	**79**	**78**	**75**	**71**
Brand Impact	**.86**	**.70**	**.59**	**.58**	**.42**	**.38**

Category: Enterprise Storage

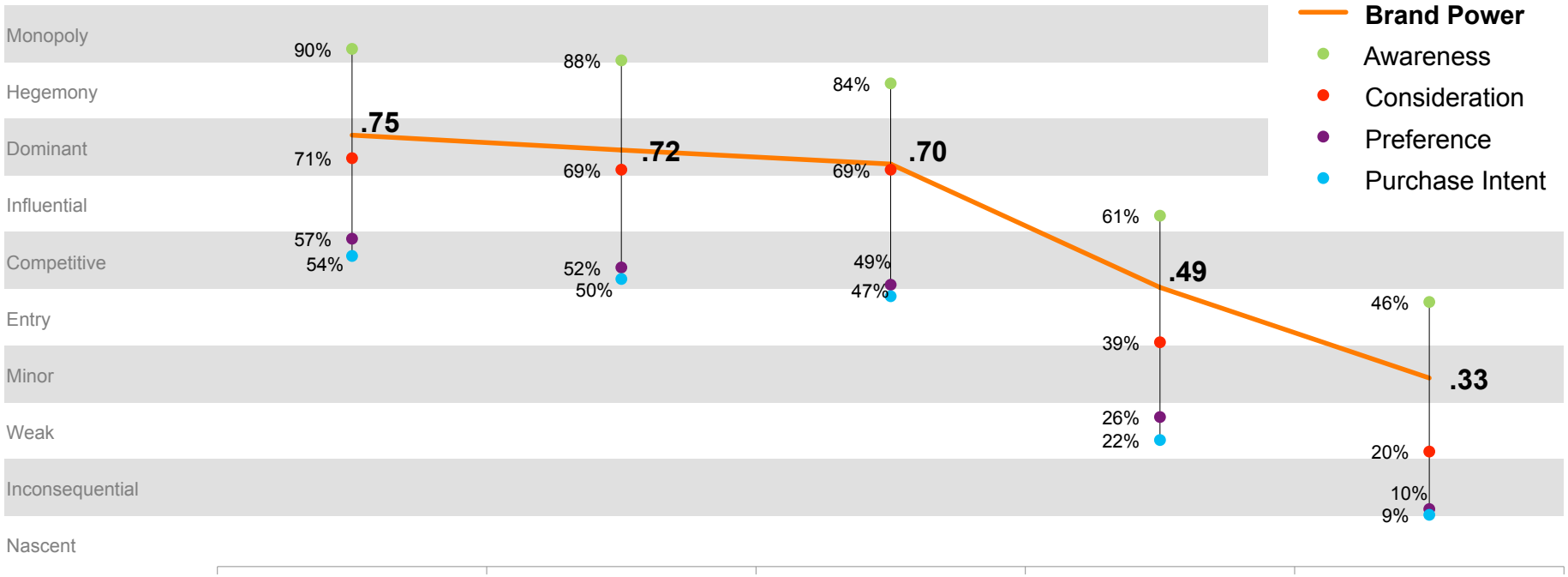
Winner: **HP**



	HP	IBM	Dell	Sun	Hitachi Data System	EMC	Fujitsu	NetApp	Blue Arc	LSI	Pillar
Brand Power Trend											
2008-'09	↑0.16	↑0.19	↑0.14	↑0.23	↑0.25	↑0.22	↑0.21	↑0.28	↑0.28	↑0.21	↑0.19
2007-'08	↑0.03	-0.02	–	–	↓-0.03	↓-0.04	–	↓-0.21	↓-0.12	–	↓-0.07
Brand Reputation	**88**	**94**	**80**	**91**	**76**	**81**	**79**	**75**	**69**	**78**	**63**
Brand Impact	**.81**	**.80**	**.74**	**.68**	**.56**	**.56**	**.54**	**.49**	**.37**	**.37**	**.32**

Category: Servers

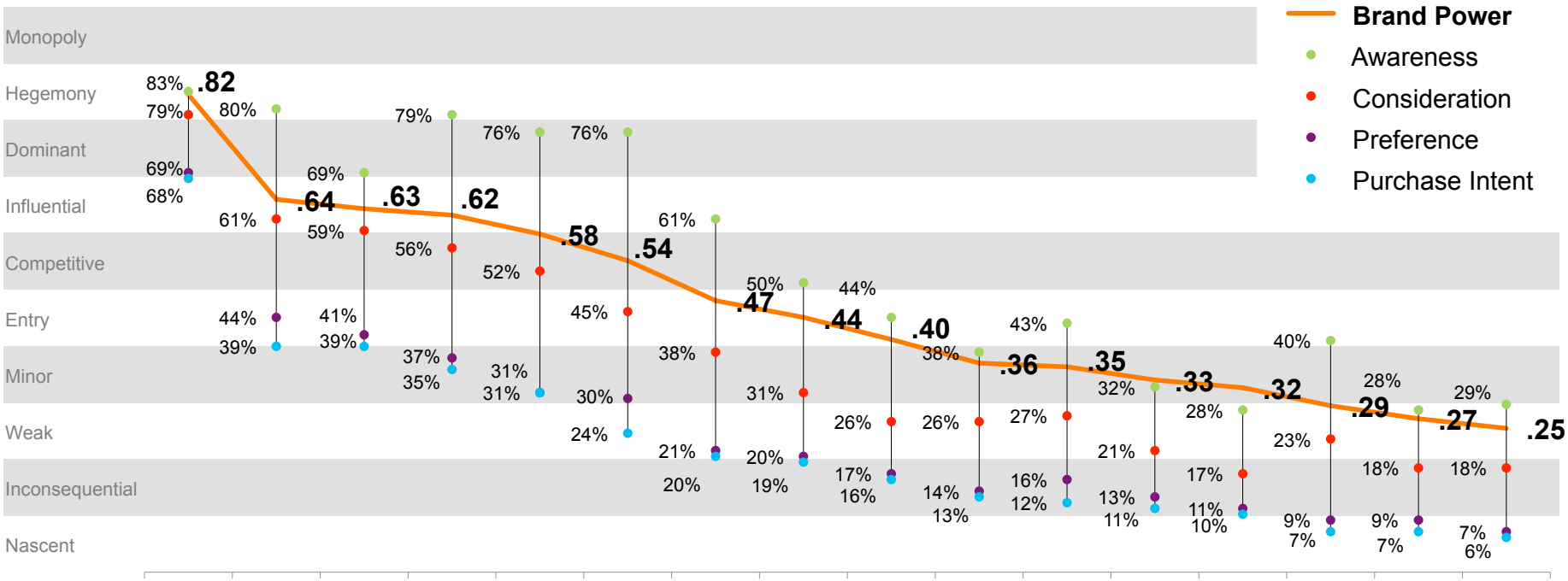
Winner: **Dell**



	Dell	HP	IBM	Sun	Fujitsu
Brand Power Trend					
2008-'09	↑0.03	↑0.04	↑0.05	↑0.07	↑0.10
2007-'08	↑0.04	↓-0.03	↓-0.04	–	↓-0.08
Brand Reputation	**81**	**89**	**91**	**82**	**70**
Brand Impact	**.76**	**.75**	**.73**	**.54**	**.38**

Category: Semiconductors

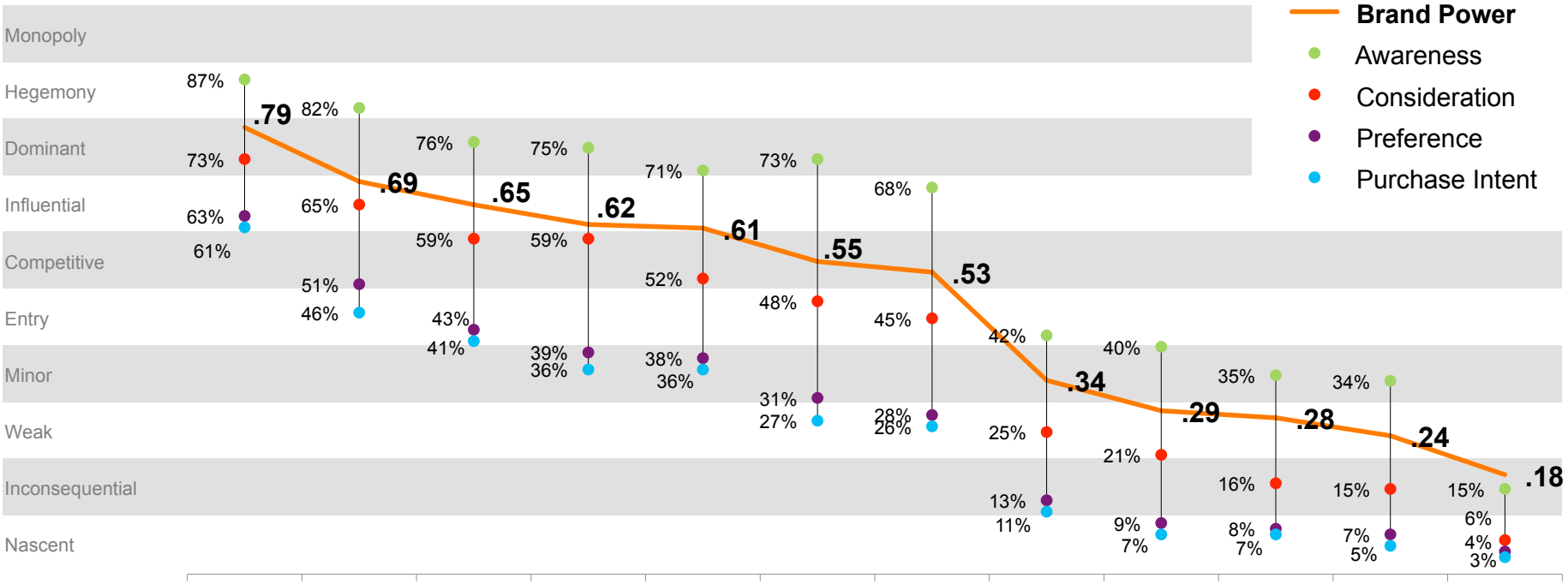
Winner: **Intel**



	Intel	Texas Instruments	AMD	Sony	Samsung	Toshiba	Qualcomm	Broadcom	Freescale	Marvell	LSI	Xilinx	Hynix	ST Electronics	NXP	Renesas
Brand Power Trend																
2008-'09	↑0.36	↑0.22	↑0.25	–	↑0.20	–	–	↑0.12	↓-0.15	↑0.03	↑0.03	↔	–	↓-0.06	–	–
2007-'08	↓-0.41	↓-0.31	↓-0.15	–	↓-0.29	–	–	–	↑0.12	↓-0.04	↓-0.19	↓-0.04	–	↑0.01	–	–
Brand Reputation	**97**	**83**	**91**	**91**	**83**	**77**	**77**	**72**	**73**	**72**	**70**	**63**	**81**	**74**	**81**	**74**
Brand Impact	**.85**	**.67**	**.67**	**.66**	**.62**	**.57**	**.51**	**.48**	**.45**	**.42**	**.41**	**.38**	**.39**	**.35**	**.35**	**.32**

Category: Enterprise Software

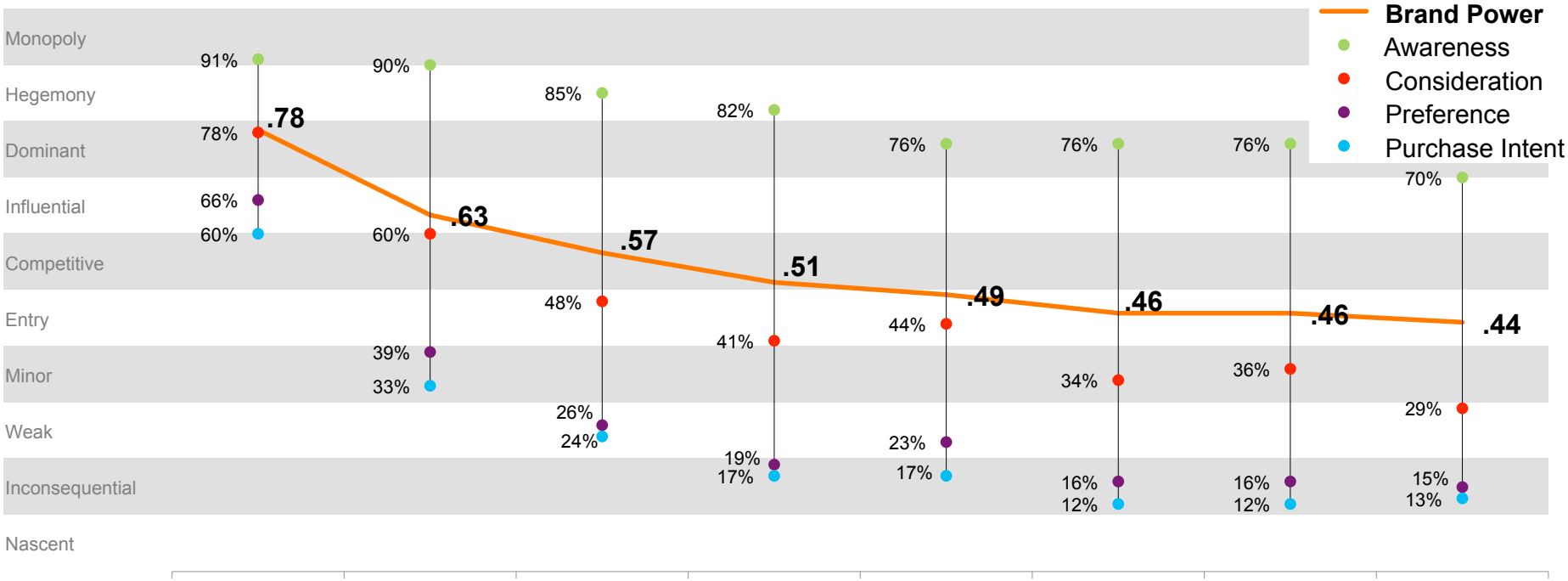
Winner: **Microsoft**



	Microsoft	IBM	HP	Oracle	Cisco	Dell	Symantec	CA	EMC	Business Objects	BEA	TIBCO
Brand Power Trend												
2008-'09	↑0.04	↑0.10	↑0.03	↑0.05	↑0.03	↑0.07	↑0.12	↑0.04	↑0.05	↑0.06	↑0.05	↓-0.03
2007-'08	-	-	-	-	-	-	-	-	-	-	-	-
Brand Reputation	**84**	**90**	**85**	**86**	**88**	**70**	**78**	**68**	**64**	**67**	**77**	**52**
Brand Impact	**.79**	**.72**	**.68**	**.65**	**.65**	**.57**	**.57**	**.38**	**.34**	**.33**	**.33**	**.23**

Category: Business Smartphone

Winner: **Blackberry**

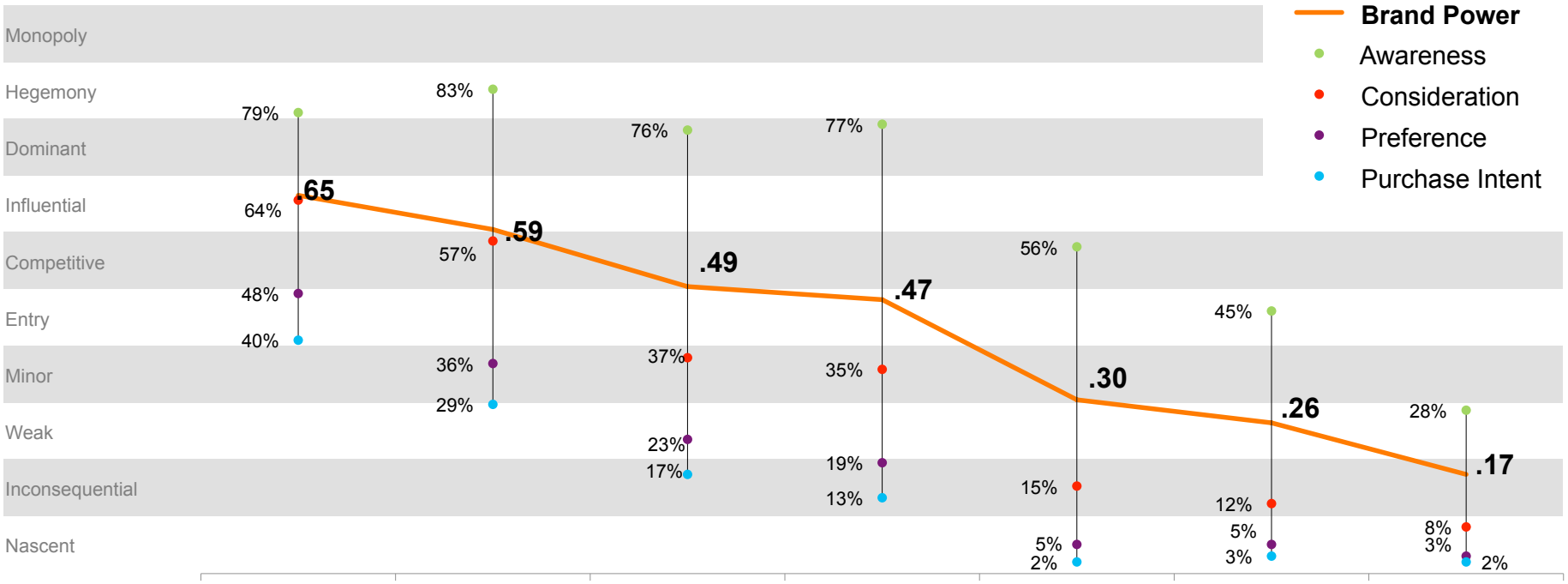


	Blackberry	iPhone	Motorola	Palm	LG	Nokia	Samsung	T-Mobile G1
Brand Power Trend								
2008-'09	↑0.04	↑0.08	↓-0.06	↓-0.07	-	↓-0.09	↓-0.05	-
2007-'08	–	–	–	–	–	–	–	–
Brand Reputation	**92**	**89**	**65**	**65**	**73**	**62**	**63**	**54**
Brand Impact	**.80**	**.67**	**.58**	**.53**	**.53**	**.48**	**.48**	**.46**

Brand Impact Scores:
B2C Categories Detail

Category: Wireless Carriers

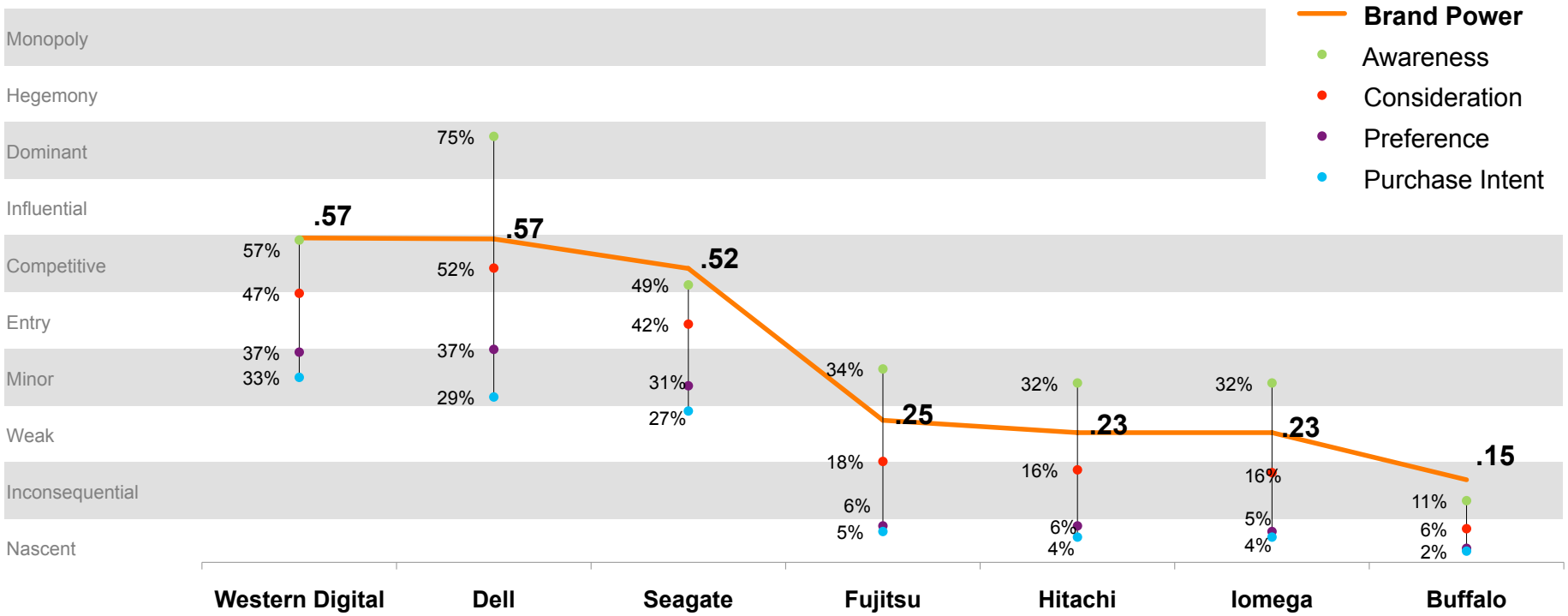
Winner: **Verizon**



	Verizon	AT&T	T-Mobile	Sprint	Virgin	US Cellular	Metro PCS
Brand Power Trend							
2008-'09	↑0.03	↓-0.03	↓-0.03	↔	↓-0.03	↓-0.05	↑0.09
2007-'08	–	–	–	–	–	–	–
Brand Reputation	**78**	**66**	**51**	**50**	**26**	**20**	**30**
Brand Impact	**.67**	**.60**	**.50**	**.47**	**.29**	**.25**	**.19**

Category: External Hard Drives

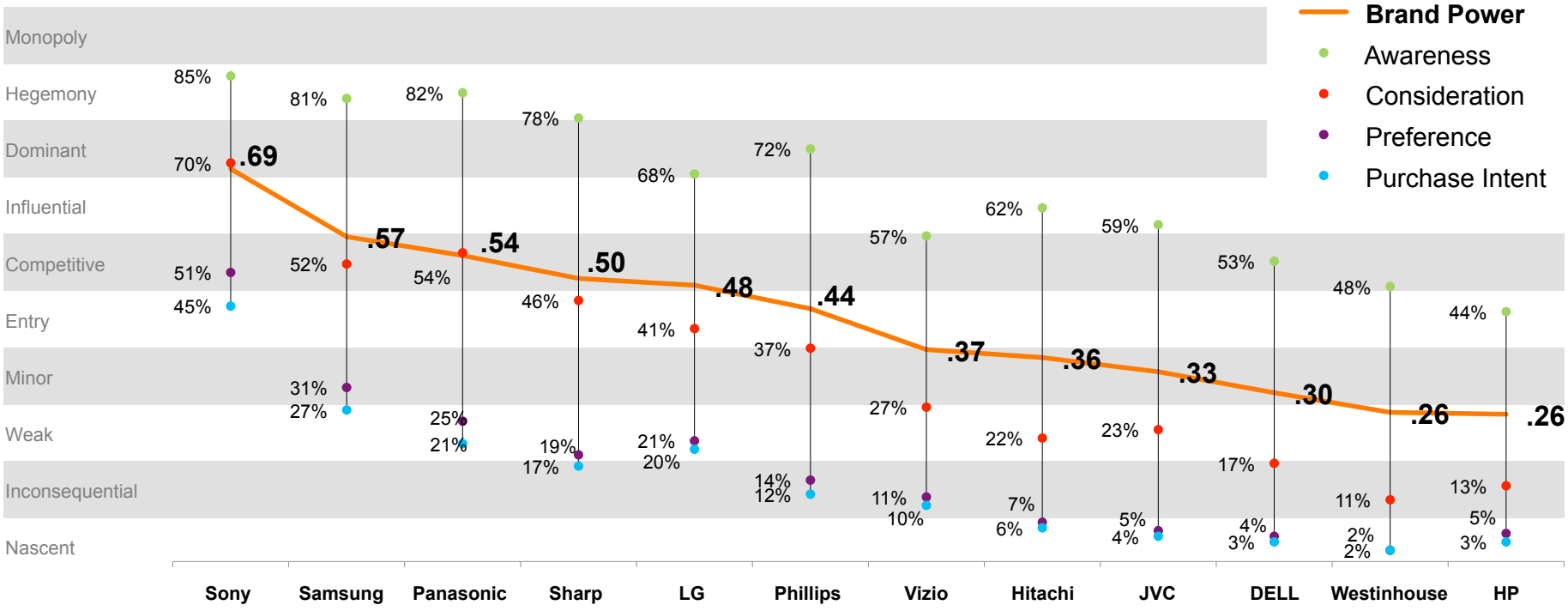
Winner: **Western Digital**



	Western Digital	Dell	Seagate	Fujitsu	Hitachi	Iomega	Buffalo
Brand Power Trend							
2008-'09	↓-0.03	↔	↓-0.01	↓-0.07	↓-0.04	↓-0.13	–
2007-'08	↑0.10	↓-0.02	↑0.12	↑0.10	↑0.07	↑0.09	–
Brand Reputation	**88**	**70**	**86**	**74**	**72**	**59**	**59**
Brand Impact	**.62**	**.59**	**.57**	**.32**	**.30**	**.28**	**.21**

Category: HDTV

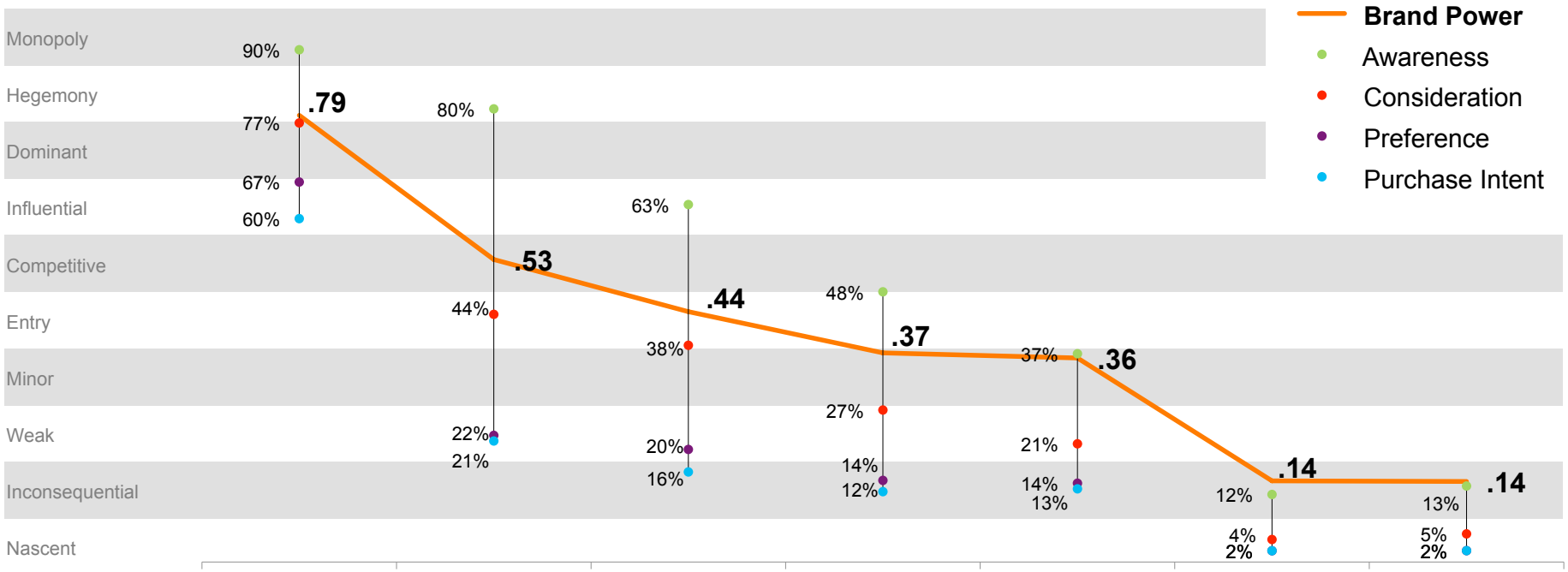
Winner: **Sony**



	Sony	Samsung	Panasonic	Sharp	LG	Phillips	Vizio	Hitachi	JVC	DELL	Westinhouse	HP
Brand Power Trend												
2008-'09	↓-0.03	↑0.02	↓-0.05	↓-0.02	↔	↓-0.08	↑0.03	↓-0.09	↓-0.09	↓-0.07	↓-0.03	↓-0.08
2007-'08	↓-0.06	↔	↓-0.05	↓-0.01	↑0.03	↓-0.03	–	↑0.10	↓-0.04	↓-0.05	–	↓-0.05
Brand Reputation	**91**	**79**	**74**	**72**	**78**	**71**	**67**	**60**	**68**	**57**	**45**	**58**
Brand Impact	**.72**	**.60**	**.57**	**.53**	**.53**	**.48**	**.42**	**.39**	**39**	**.34**	**.29**	**.31**

Category: Portable Media Players

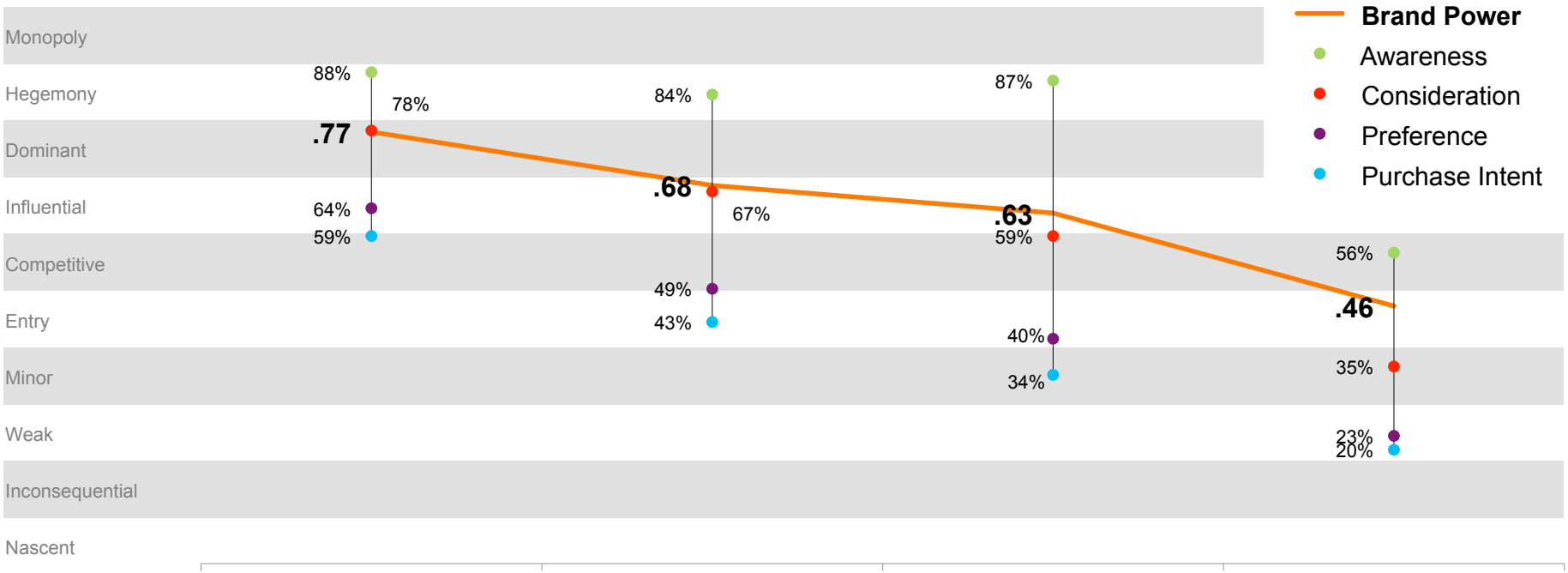
Winner: **Apple iPod**



	Apple iPod	Sony Walkman	Microsoft Zune	Sandisk Sansa	Creative Zen	Samsung Yepp	iRiver Clix
Brand Power Trend							
2008-'09	↔	↑0.01	↓-0.03	↓-0.02	↓-0.04	↓-0.14	↓-0.06
2007-'08	↓-0.02	–	↑0.09	↑0.01	↓-0.01	↑0.01	↓-0.10
Brand Reputation	**95**	**76**	**76**	**70**	**73**	**63**	**52**
Brand Impact	**.81**	**.57**	**.49**	**.42**	**.41**	**.22**	**.20**

Category: Gaming Handheld

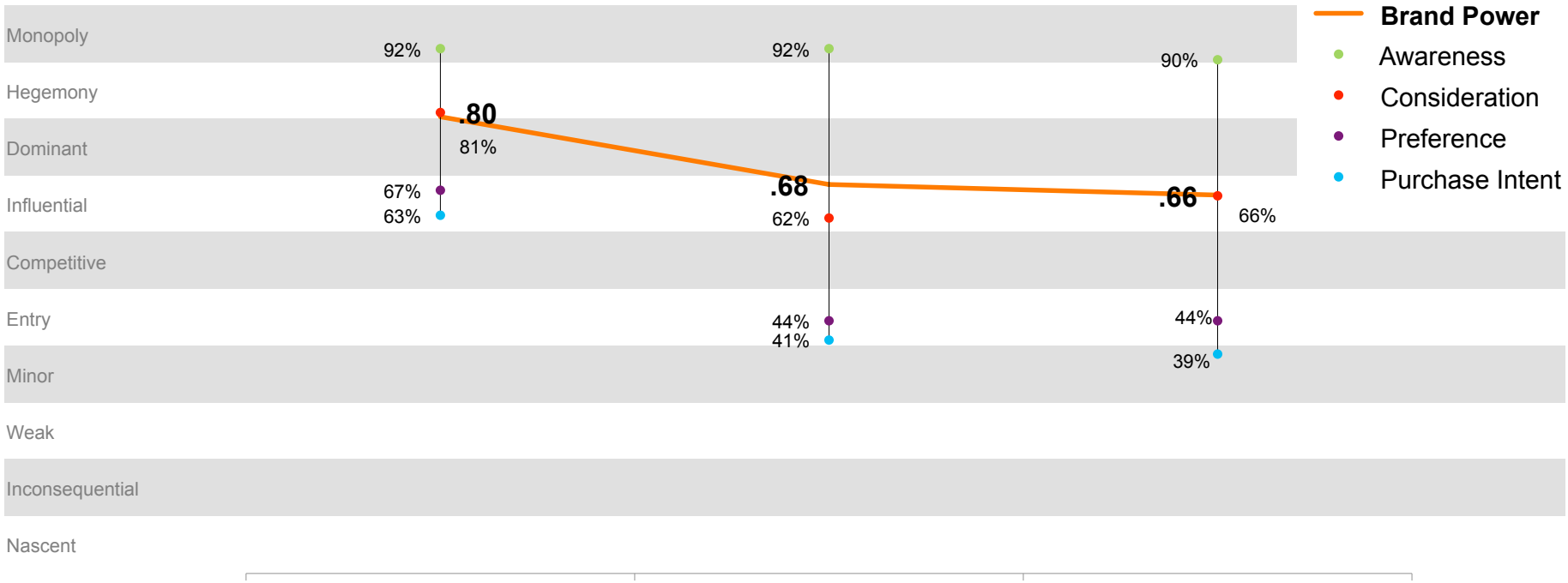
Winner: **Nintendo DS**



	Nintendo DS	PSP	Gameboy	iTouch
Brand Power Trend				
2008-'09	↑0.09	↔	↓-0.02	–
2007-'08	–	–	–	–
Brand Reputation	**94**	**91**	**81**	**83**
Brand Impact	**.80**	**.71**	**.66**	**.52**

Category: Gaming Consoles

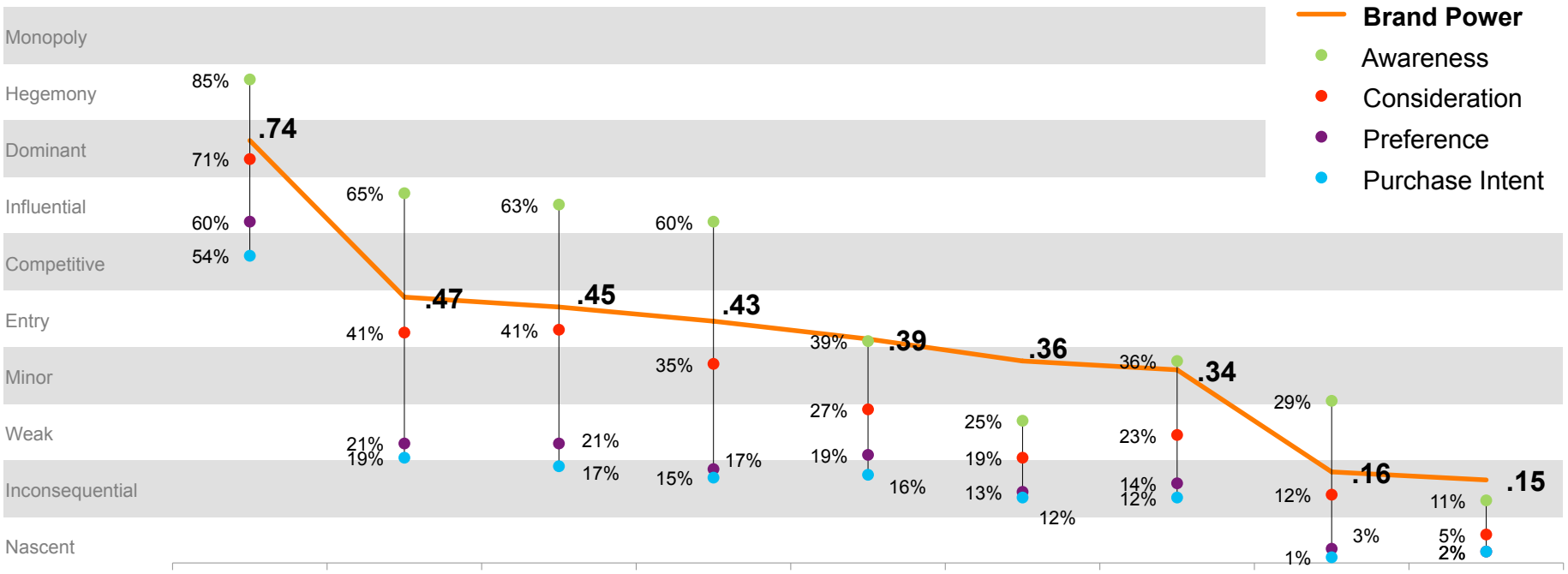
Winner: **Nintendo Wii**



	Nintendo Wii	XBOX 360	Play Station 3
Brand Power Trend			
2008-'09	↑0.14	↑0.02	↓-0.07
2007-'08	↑0.04	↔	↓-0.08
Brand Reputation	**96**	**88**	**97**
Brand Impact	**.83**	**.71**	**.71**

Category: Bluetooth Headsets

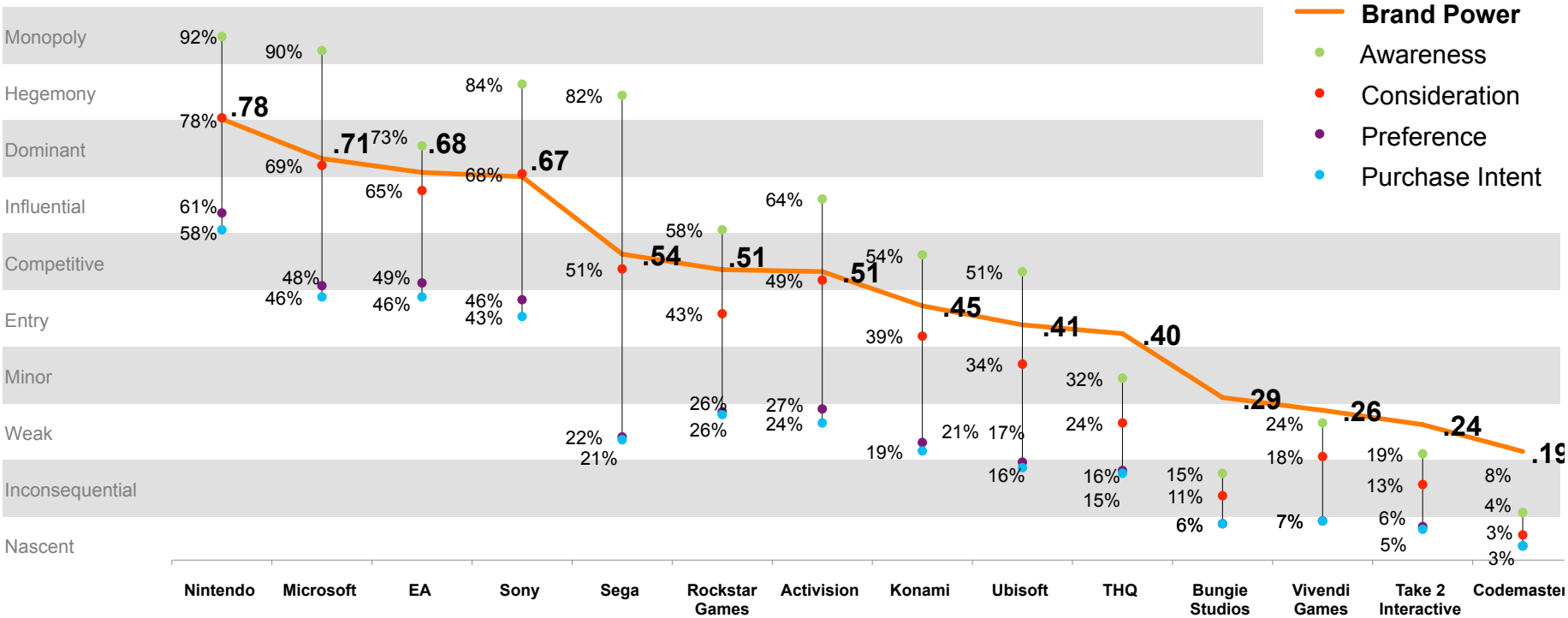
Winner: **Motorola**



	Motorola	Nokia	Samsung	Sony Ericsson	Plantronics	Jawbone (Aliph)	Jabra	Kyocera	Fellowes
Brand Power Trend									
2008-'09	↓-0.03	↑0.06	↑0.04	↑0.05	↔	↑0.19	↓-0.06	↓-0.06	↔
2007-'08	↑0.03	↓-0.21	↓-0.15	↓-0.13	↑0.09	–	0.10	↓-0.10	↑0.02
Brand Reputation	**84**	**75**	**74**	**76**	**74**	**88**	**68**	**46**	**64**
Brand Impact	**.76**	**.51**	**.49**	**.47**	**.45**	**.43**	**.39**	**.20**	**.22**

Category: Video Game Publishers

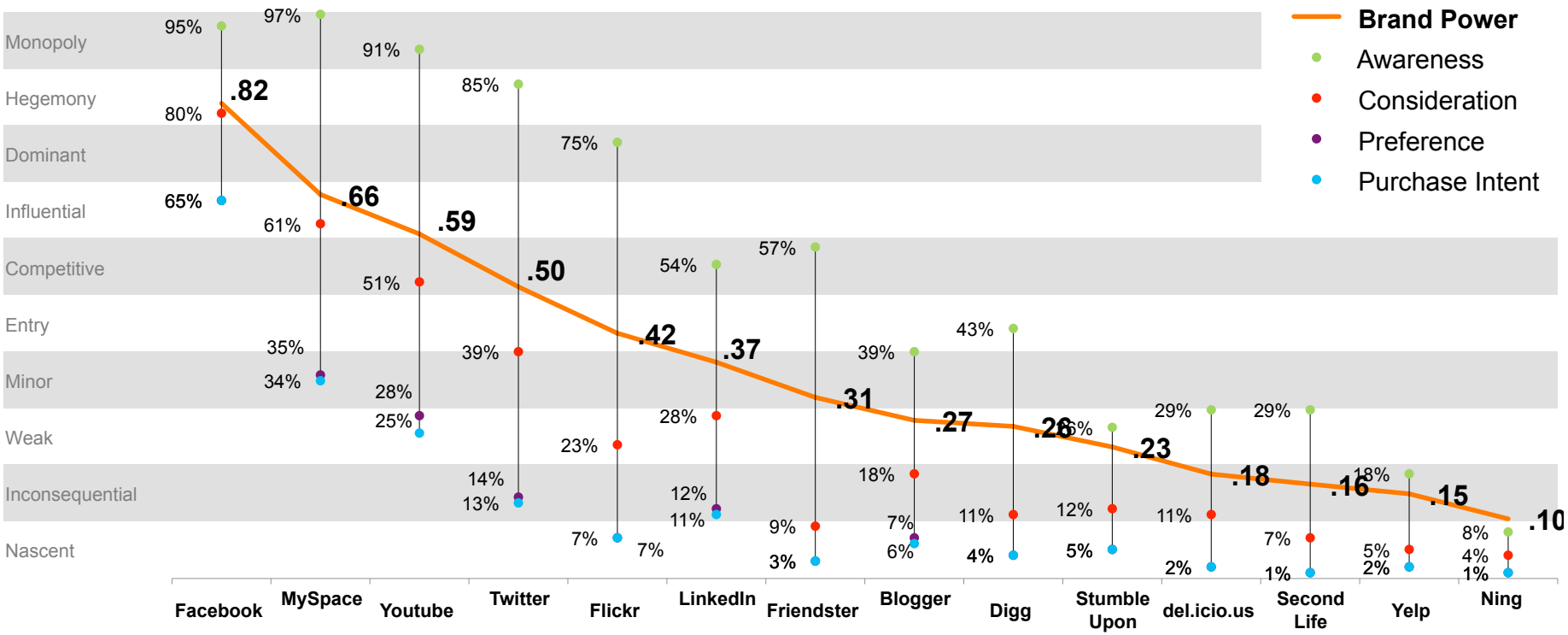
Winner: **Nintendo**



	Nintendo	Microsoft	EA	Sony	Sega	Rockstar Games	Activision	Konami	Ubisoft	THQ	Bungie Studios	Vivendi Games	Take 2 Interactive	Codemaster
Brand Power Trend														
2008-'09	–	↓-2.37	↑3.31	↓-2.78	↓-6.88	↑13.02	↓-4.20	↓-0.02	↓-0.01	–	↑0.02	↓-0.16	↓-0.12	↓-3.77
2007-'08	–	↑2.52	↑4.40	↑4.91	↓-0.43	↑5.67	↑4.84	–	↑0.05	–	–	↑0.09	↑0.13	–
Brand Reputation	**93**	**87**	**93**	**94**	**73**	**76**	**78**	**75**	**75**	**91**	**84**	**76**	**76**	**47**
Brand Impact	**.80**	**.73**	**.72**	**.71**	**.57**	**.55**	**.55**	**.49**	**.46**	**.47**	**.37**	**.34**	**.32**	**.23**

Category: Social Media

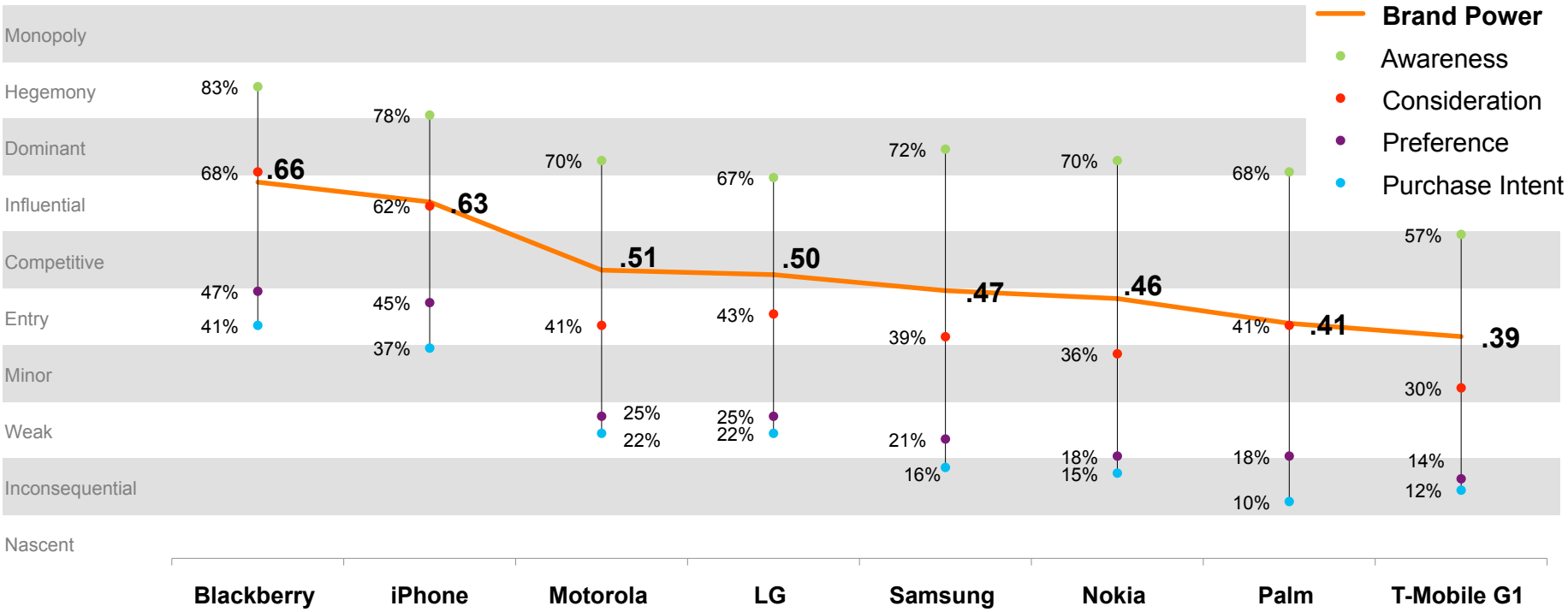
Winner: **Facebook**



	Facebook	MySpace	Youtube	Twitter	Flickr	LinkedIn	Friendster	Blogger	Digg	Stumble Upon	del.icio.us	Second Life	Yelp	Ning
Brand Power Trend														
2008-'09	↑0.29	↓-0.12	↑0.03	–	–	↑0.18	↑0.01	↑0.01	–	–	–	↑0.02	–	–
2007-'08	↑0.12	↑0.05	↑0.05	–	–	↓-0.03	↔	↔	–	–	–	↓-0.02	–	–
Brand Reputation	**79**	**62**	**73**	**58**	**42**	**54**	**29**	**49**	**36**	**57**	**43**	**26**	**32**	**47**
Brand Impact	**.81**	**.65**	**.61**	**.51**	**.42**	**.40**	**.31**	**.31**	**.28**	**.28**	**.22**	**.18**	**.17**	**.16**

Category: Smartphone

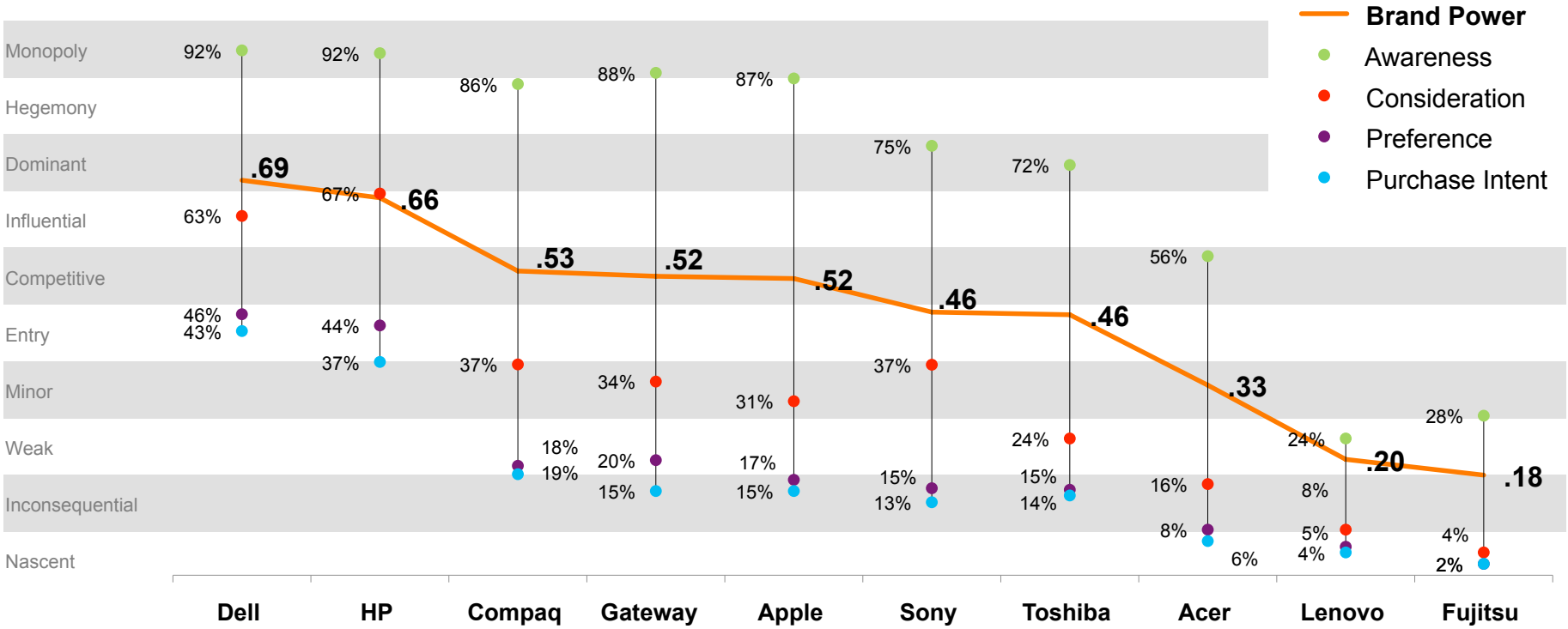
Winner: **Blackberry**



	Blackberry	iPhone	Motorola	LG	Samsung	Nokia	Palm	T-Mobile G1
Brand Power Trend								
2008-'09	↑0.17	↑0.05	↓-0.06	–	↑0.04	↑0.02	↓-0.02	–
2007-'08	↓-0.16	–	↓-0.03	–	–	↓-0.11	↓-0.20	–
Brand Reputation	**93**	**90**	**61**	**74**	**68**	**62**	**76**	**63**
Brand Impact	**.70**	**.67**	**.52**	**.54**	**.50**	**.48**	**.46**	**.43**

Category: PCs

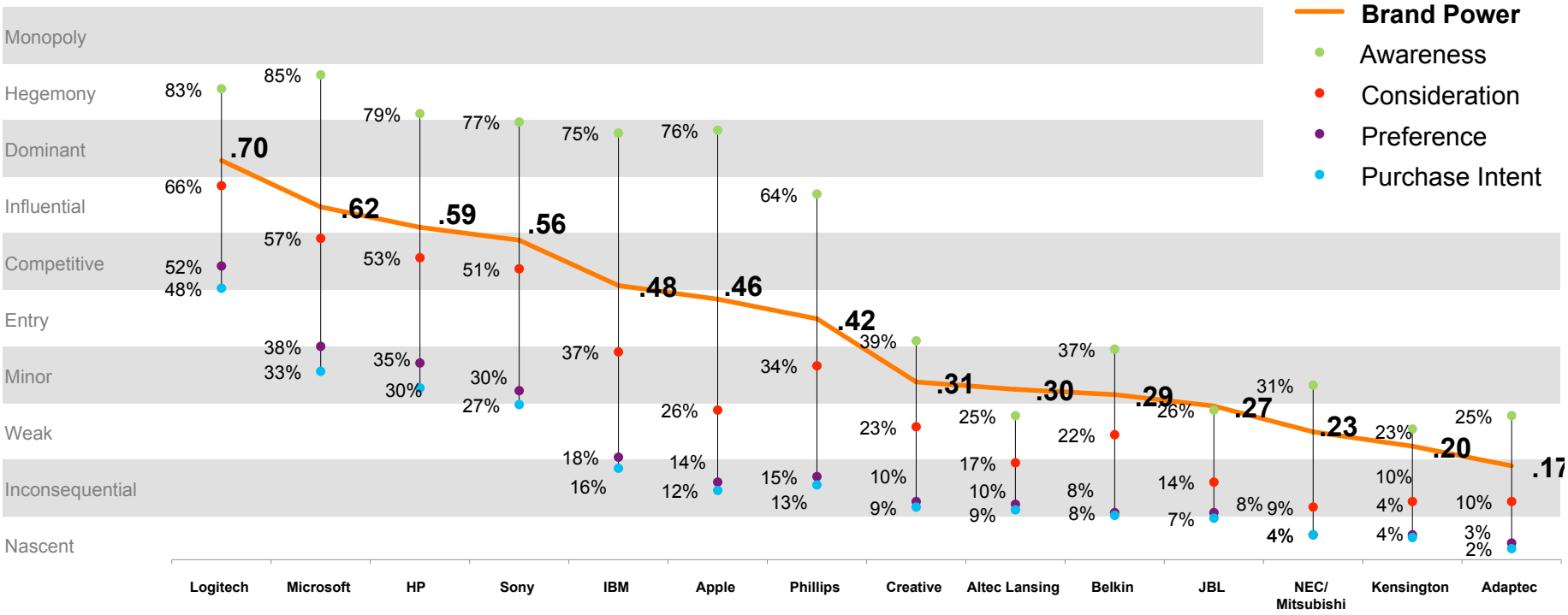
Winner: **Dell**



	Dell	HP	Compaq	Gateway	Apple	Sony	Toshiba	Acer	Lenovo	Fujitsu
Brand Power Trend										
2008-'09	↑0.01	↓-0.03	–	↔	↑0.03	↓-0.03	↑0.04	–	↑0.07	↔
2007-'08	↓-0.06	↑0.02	–	↔	↓-0.03	↑0.02	↑0.01	–	↑0.08	↑0.01
Brand Reputation	**78**	**81**	**60**	**54**	**75**	**72**	**58**	**50**	**63**	**40**
Brand Impact	**.71**	**.68**	**.54**	**.53**	**.55**	**.50**	**.47**	**.36**	**.27**	**.21**

Category: Auxiliary / Peripheral

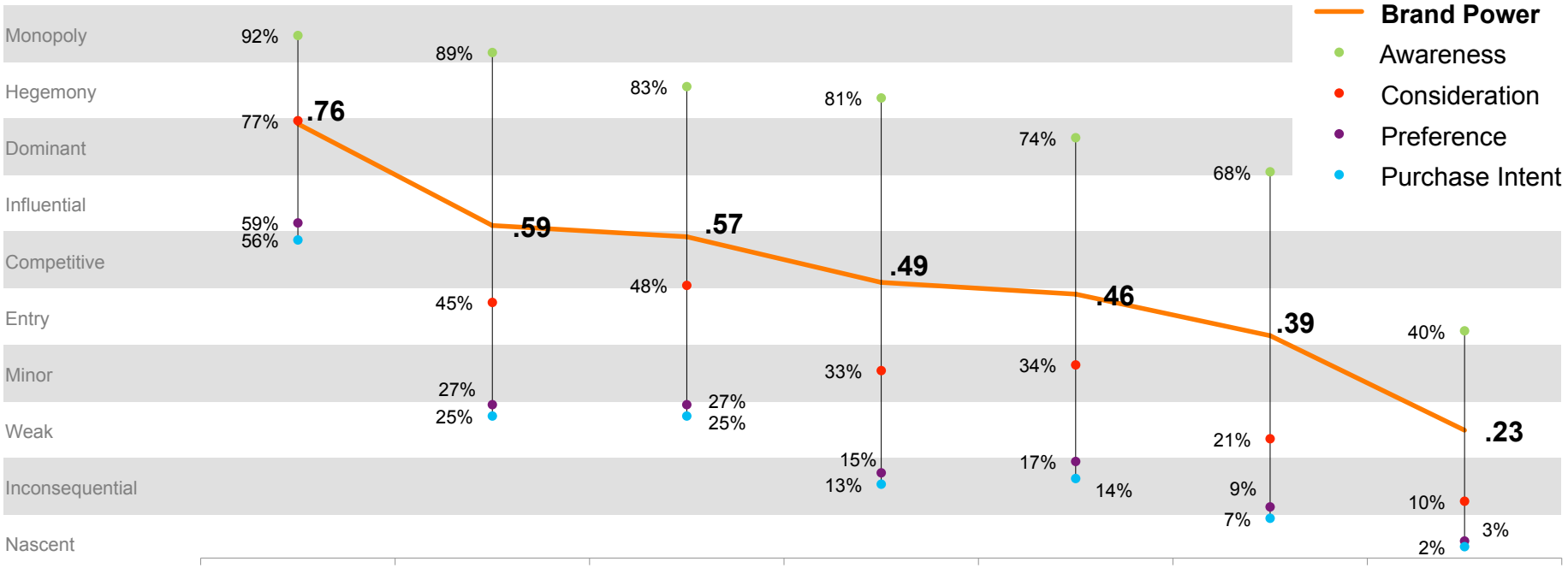
Winner: **Logitech**



	Logitech	Microsoft	HP	Sony	IBM	Apple	Phillips	Creative	Altec Lansing	Belkin	JBL	NEC/ Mitsubishi	Kensington	Adaptec
Brand Power Trend														
2008-'09	↑0.03	↓-0.04	↓-0.06	↔	↓-0.05	↔	↑0.07	↓-0.02	↔	↓-0.02	↑0.04	↓-0.06	↓-0.03	↓-0.11
2007-'08	↑0.03	–	↓-0.04	↓-0.04	↑0.03	–	↓-0.05	↑0.05	↑0.04	–	–	↑0.02	–	↑0.11
Brand Reputation	**86**	**83**	**78**	**89**	**74**	**76**	**66**	**77**	**77**	**74**	**76**	**54**	**65**	**58**
Brand Impact	**.73**	**.65**	**.61**	**.61**	**.52**	**.50**	**.46**	**.38**	**.37**	**.36**	**.34**	**.27**	**.27**	**.23**

Category: Printers

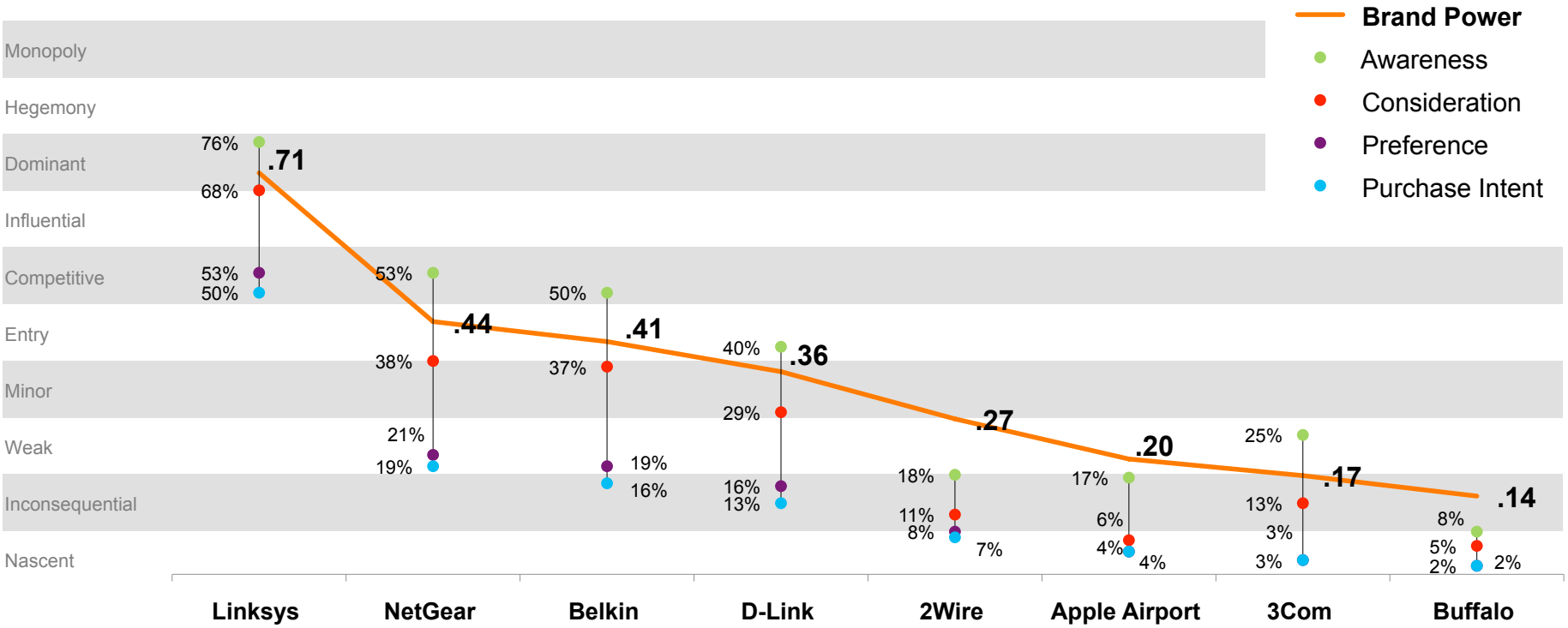
Winner: **HP**



	HP	Canon	Lexmark	Epson	Kodak	Brother	Fuji
Brand Power Trend							
2008-'09	↓-0.03	↑0.05	↑0.02	↓-0.03	↑0.05	↓-0.06	↓-0.03
2007-'08	↔	↑0.04	↑0.05	↑0.03	↑0.41	↑0.08	↔
Brand Reputation	**88**	**79**	**70**	**62**	**72**	**56**	**51**
Brand Impact	**.78**	**.62**	**.59**	**.51**	**.50**	**.42**	**.27**

Category: Wireless Networking Devices

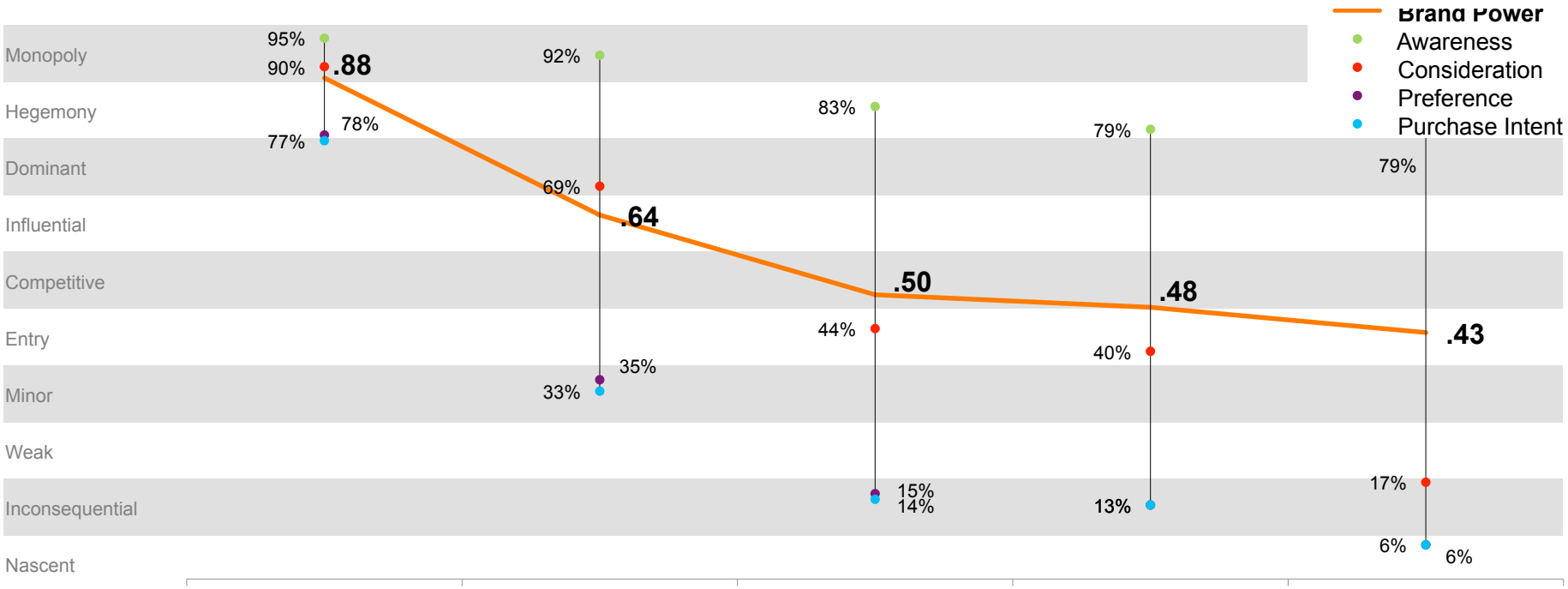
Winner: **Linksys**



	Linksys	NetGear	Belkin	D-Link	2Wire	Apple Airport	3Com	Buffalo
Brand Power Trend								
2008-'09	↔	↓-0.02	↑0.01	↓-0.06	–	↓-0.06	↓-0.11	↓-0.04
2007-'08	↑0.03	↑0.07	↑0.05	↑0.03	–	–	↑0.03	↑0.15
Brand Reputation	**89**	**83**	**80**	**76**	**77**	**68**	**71**	**67**
Brand Impact	**.73**	**.50**	**.47**	**.42**	**.35**	**.27**	**.25**	**.22**

Category: Search Engines

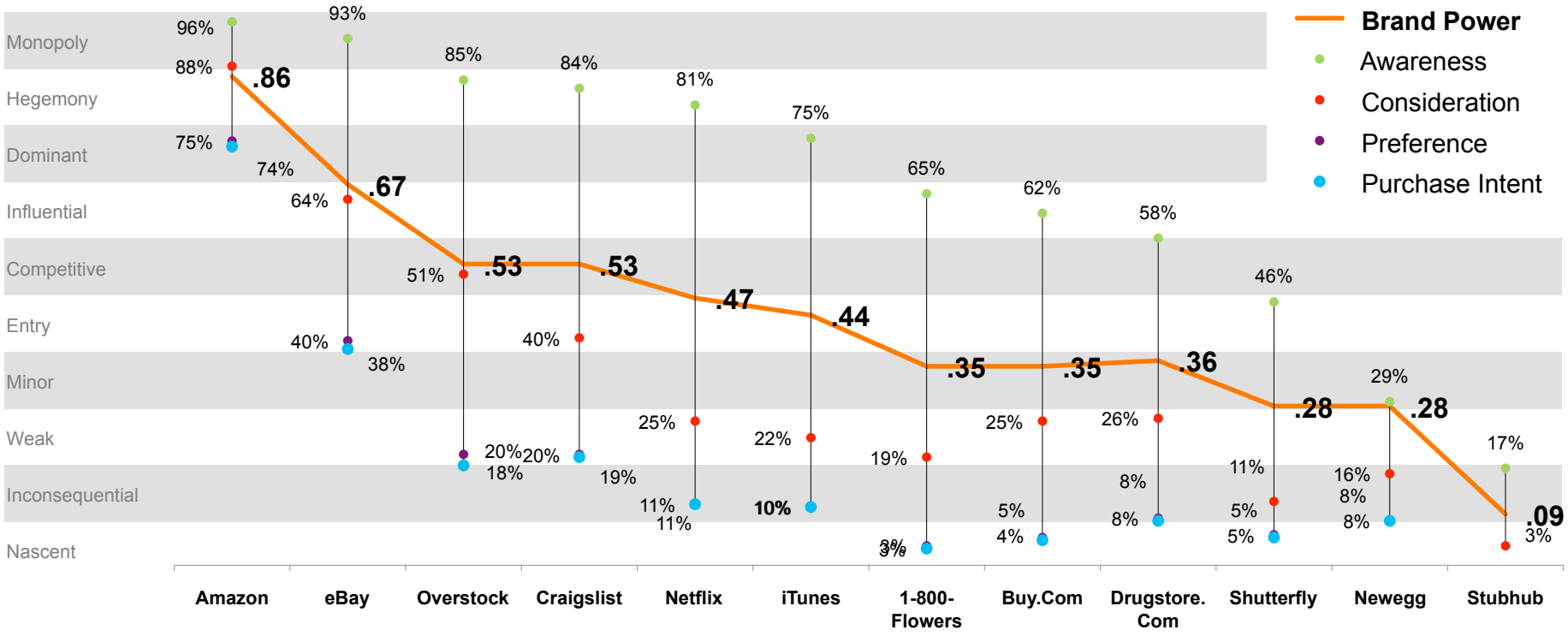
Winner: **Google**



	Google	Yahoo!	MSN	Ask.com	AOL
Brand Power Trend					
2008-'09	↑0.01	↑0.04	↓-0.03	↓-0.04	↑0.02
2007-'08	↑0.02	↔	↑0.02	↑0.05	–
Brand Reputation	**96**	**80**	**63**	**66**	**33**
Brand Impact	**.89**	**.66**	**.52**	**.51**	**.42**

Category: Pure Play Shopping

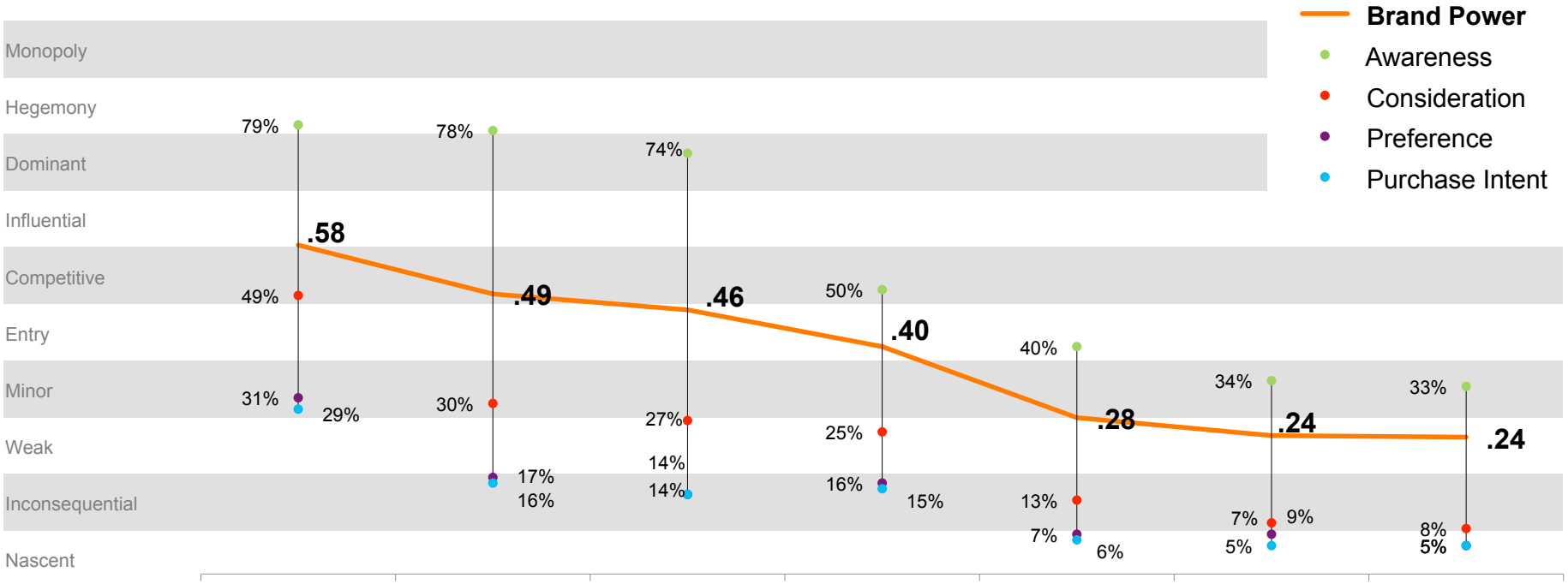
Winner: **Amazon**



	Amazon	eBay	Overstock	Craigslist	Netflix	iTunes	1-800-Flowers	Buy.Com	Drugstore.Com	Shutterfly	Newegg	Stubhub
Brand Power Trend												
2008-'09	↓-0.05	↓-0.04	↓-0.05	↑0.07	↓-0.02	↓-0.04	–	–	↓-0.14	–	↑0.02	↓-0.06
2007-'08	–	–	–	–	–	–	–	–	–	–	–	–
Brand Reputation	**92**	**74**	**51**	**62**	**55**	**51**	**50**	**44**	**48**	**41**	**61**	**34**
Brand Impact	**.87**	**.68**	**.53**	**.54**	**.48**	**.45**	**.38**	**.36**	**.36**	**.30**	**.33**	**.12**

Category: Cable / Sat

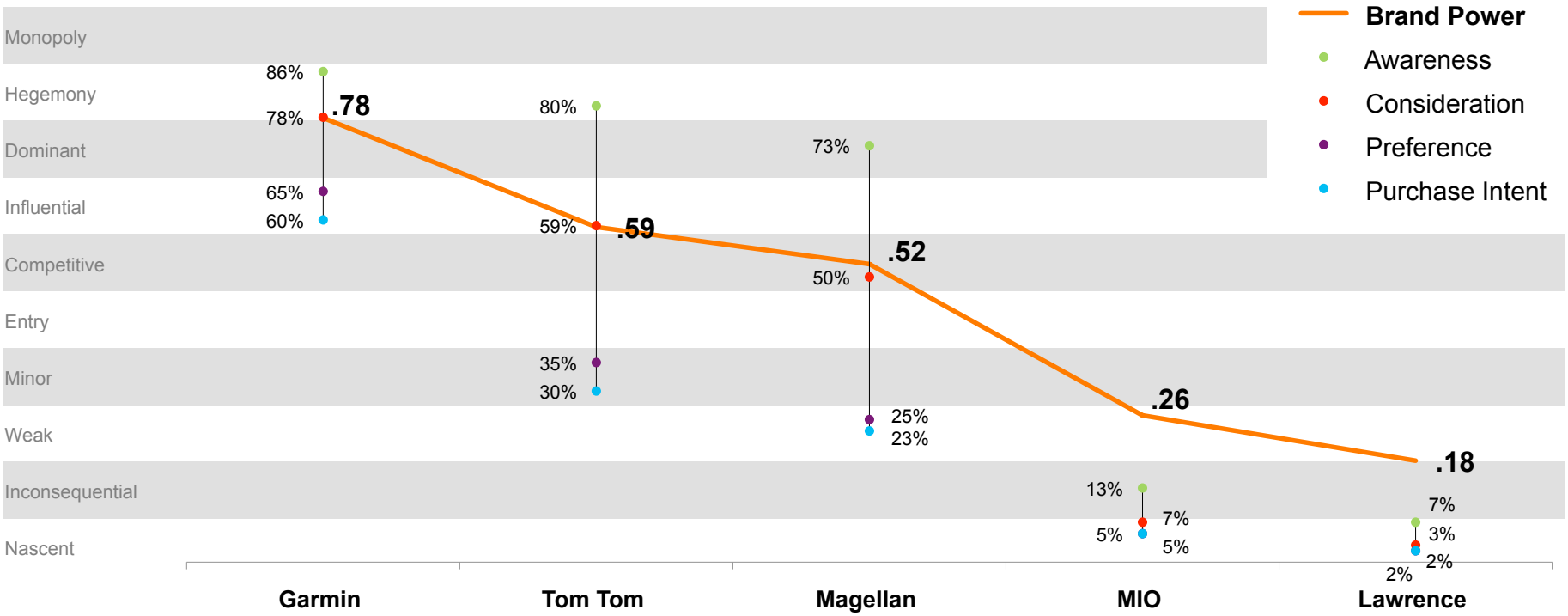
Winner: **Direct TV**



	Direct TV	Comcast	Timewarner	Echostar Dish Network	Cox Enterprises	Cablevision Systems	Charter Cable Communications
Brand Power Trend							
2008-'09	↑0.03	↓-0.08	↓-0.06	↓-0.04	↓-0.04	↓-0.03	↓-0.03
2007-'08	–	–	–	–	–	–	–
Brand Reputation	**67**	**49**	**47**	**58**	**45**	**43**	**40**
Brand Impact	**.59**	**.49**	**.47**	**.43**	**.30**	**.27**	**.26**

Category: GPS

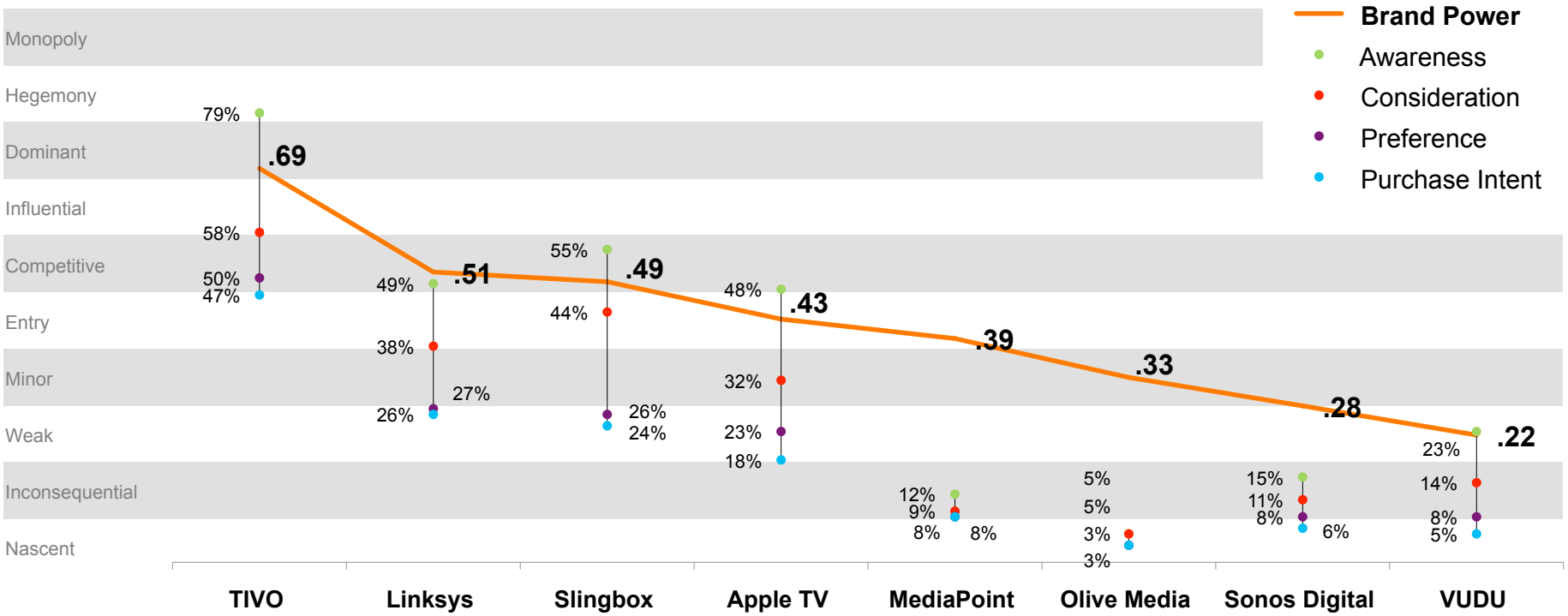
Winner: **Garmin**



	Garmin	Tom Tom	Magellan	MIO	Lawrence
Brand Power Trend					
2008-'09	↑0.05	↑0.15	↓-0.05	↑0.05	↓-0.02
2007-'08	–	–	–	–	–
Brand Reputation	**92**	**84**	**81**	**62**	**47**
Brand Impact	**.80**	**.63**	**.57**	**.31**	**.22**

Category: Media Hub Devices

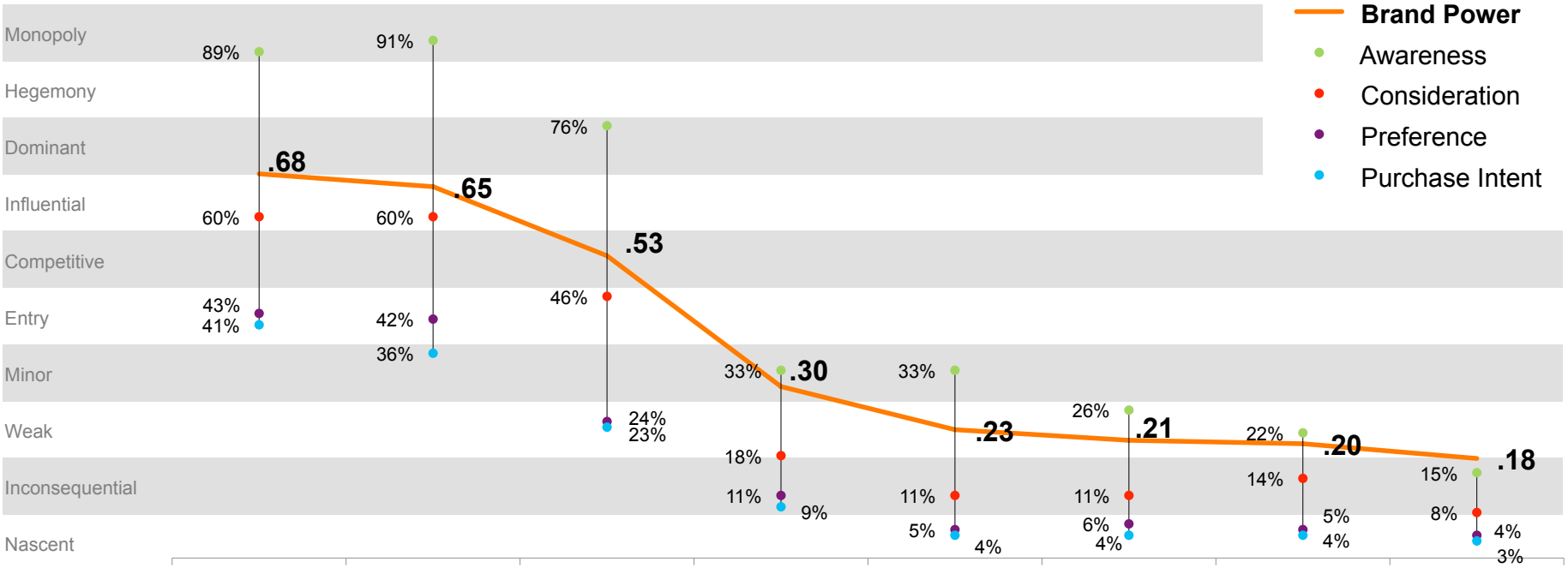
Winner: **TIVO**



	TIVO	Linksys	Slingbox	Apple TV	MediaPoint	Olive Media	Sonos Digital	VUDU
Brand Power Trend								
2008-'09	–	–	–	–	–	–	–	–
2007-'08	–	–	–	–	–	–	–	–
Brand Reputation	**94**	**94**	**89**	**81**	**88**	**100**	**90**	**93**
Brand Impact	**.73**	**.57**	**.55**	**.49**	**.47**	**.43**	**.37**	**.33**

Category: Personal Internet Security

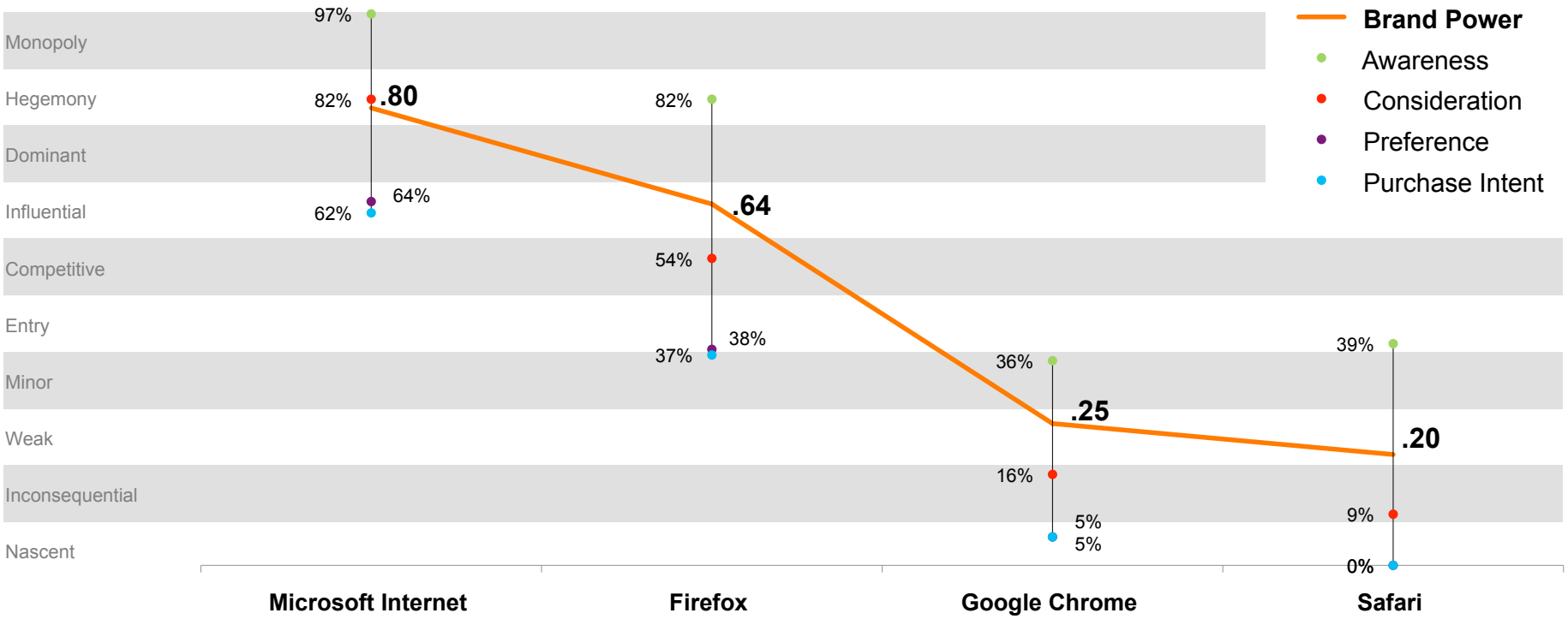
Winner: **Norton**



	Norton	Mcafee	Symantec	Trend Micro	Lifelock	Webroot	Kapersky	Zone Alarm
Brand Power Trend								
2008-'09	–	–	–	–	–	–	–	–
2007-'08	–	–	–	–	–	–	–	–
Brand Reputation	**74**	**69**	**75**	**57**	**57**	**60**	**71**	**48**
Brand Impact	**.69**	**.66**	**.56**	**.34**	**.28**	**.27**	**.28**	**.22**

Category: Internet Browsers

Winner: **Microsoft Internet Explorer**



	Microsoft Internet	Firefox	Google Chrome	Safari
Brand Power Trend				
2008-'09	–	–	–	–
2007-'08	–	–	–	–
Brand Reputation	**80**	**81**	**64**	**47**
Brand Impact	**.80**	**.66**	**.31**	**.24**

Brand Impact Study: Methodology

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].

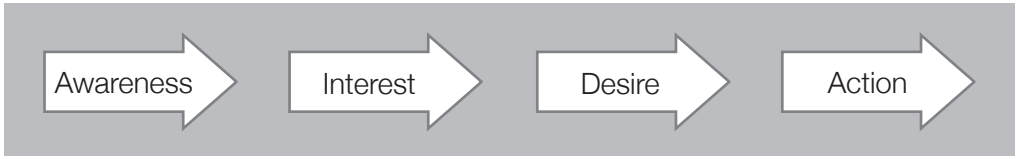


Figure 1: The Historical AIDA Framework

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

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:

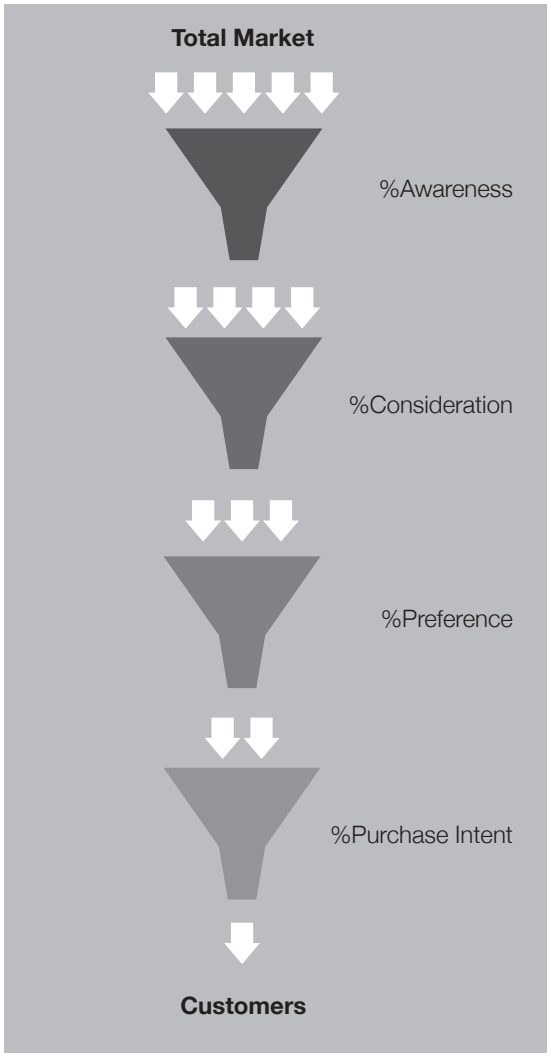


Figure 2: The Socratic Brand Power Rating™ System

•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 toi9	Nescient

Table 1: BPR Point Interpretation

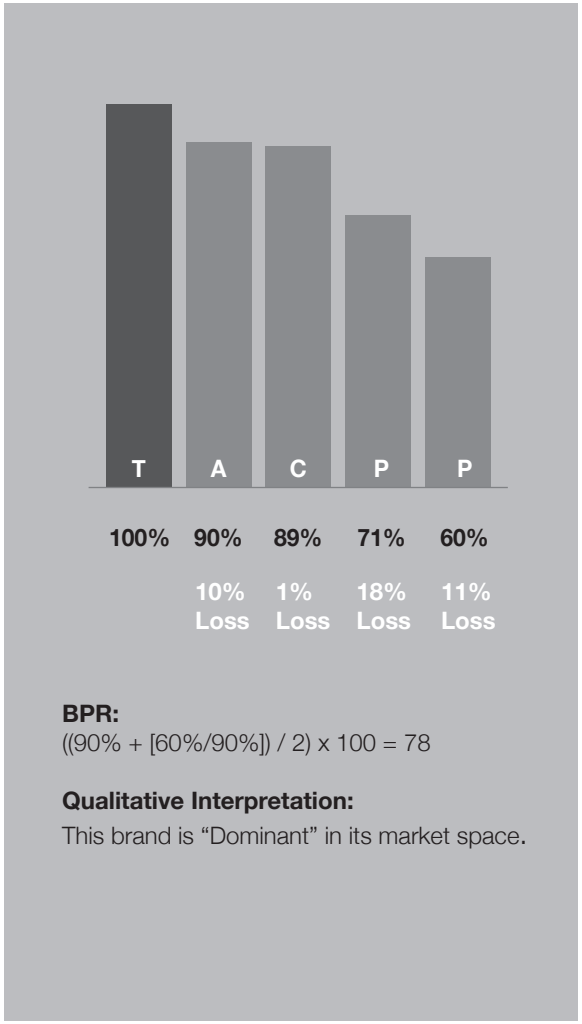


Figure 3: ACPP Component Trend Declination of the Socratic BPR

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

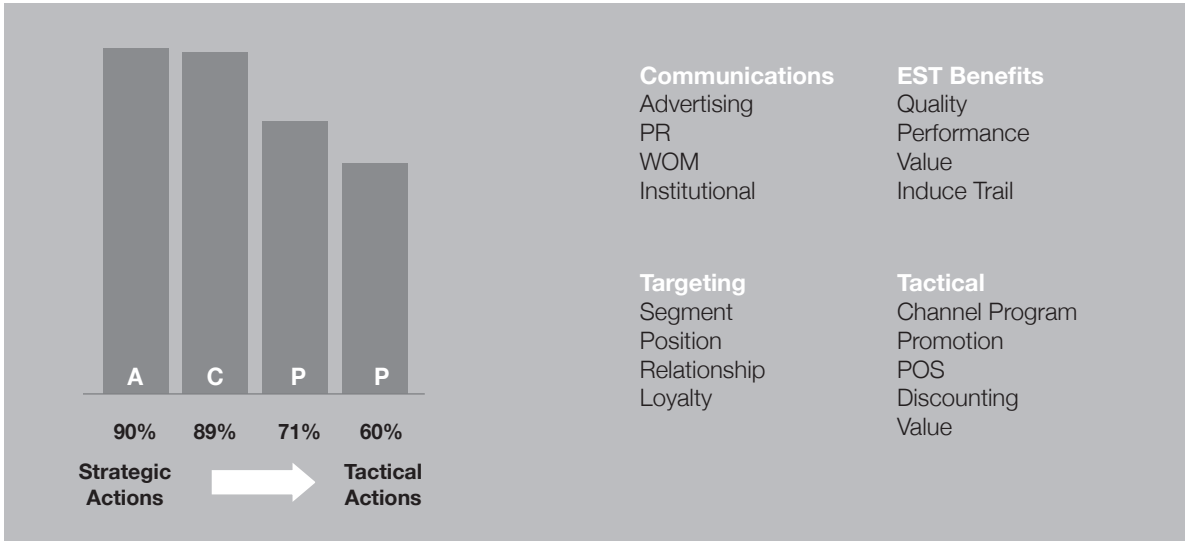


Figure 4: General Trend Declination of ACPP and Associated Brand Actions

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.

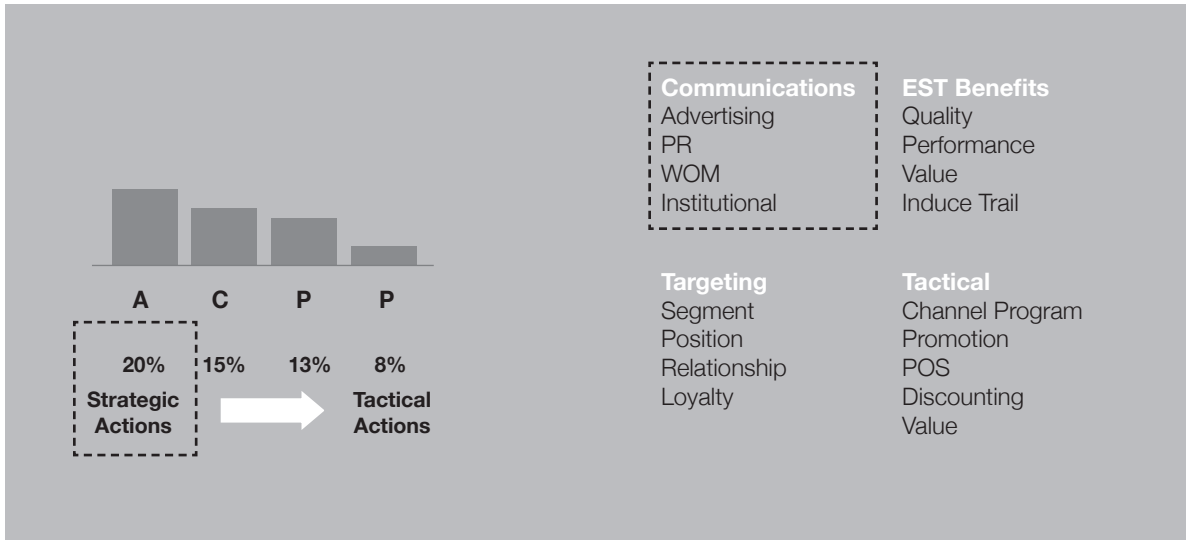


Figure 5: Trend Declination of ACPP: Low Awareness

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.

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

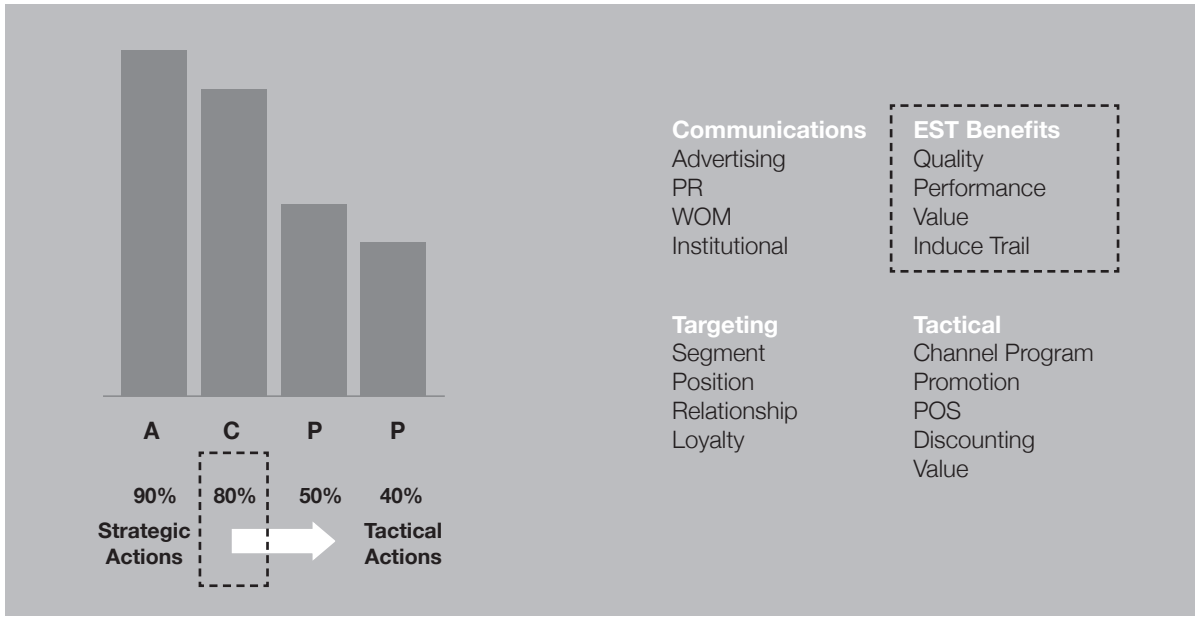


Figure 6: Trend Declination of ACPP: Low Consideration or Preference

(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%.

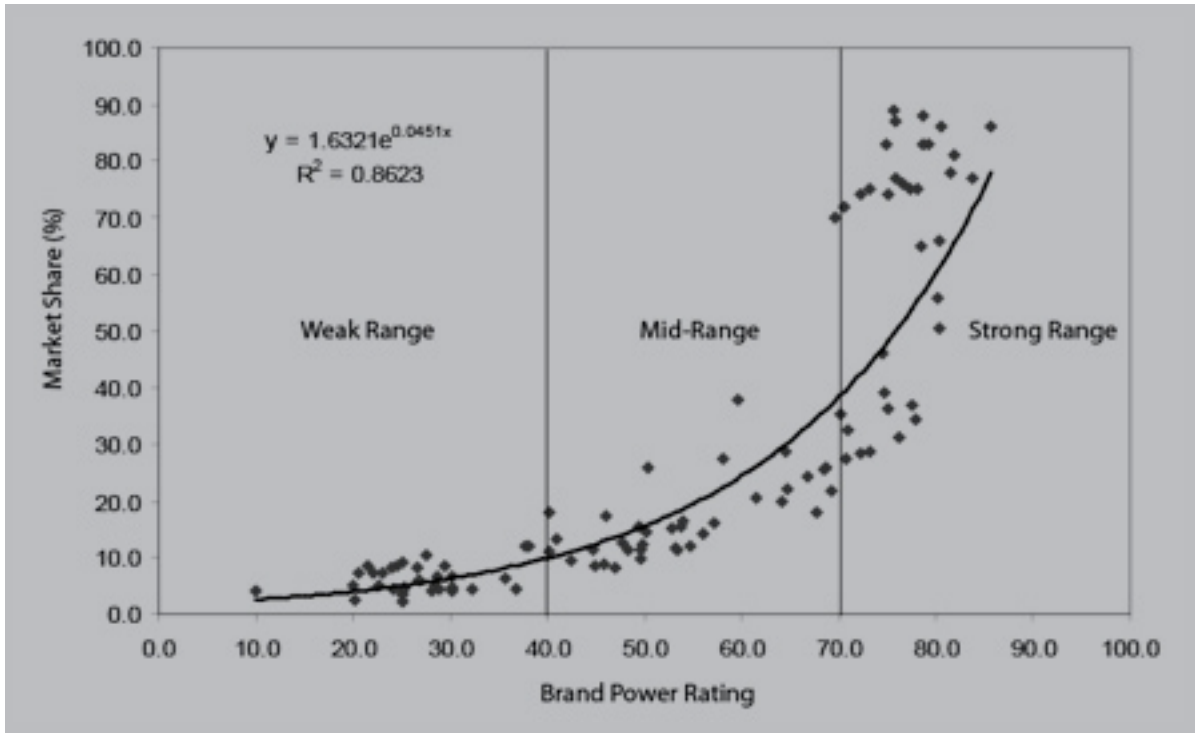


Figure 8: Relationship between Brand Power and Market Share

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 stimulate 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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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.

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