Professional Services and Solutions

2010 Brand Tracking Study

Strong brands are still the cornerstone of successful marketing programmes. Marketers use branding to differentiate their companies from competitors, which is especially important in an environment where they are "losing control" of the message due to the rise of social media. Given the challenges, it is surprising how few companies take a comprehensive approach to understanding their brand position and reputation.

REPORT HIGHLIGHTS

Overview

ITSMA's *Professional Services: 2010 Brand Tracking Study* helps services providers understand buyer attitudes and beliefs, their company's brand equity, current and/or aspired market positions, and buyers' perceptions of performance.

Based on nearly a decade of conducting the Professional Services Brand Tracking study, ITSMA saw some significant changes in the 2010 study results:

- **Brand Awareness:** IBM has long dominated the top of the pack as it relates to unaided brand awareness for IT professional services and solutions, with Accenture a distant second. But for the first time, HP has dethroned Accenture as the second-place provider.
- **Market Positioning:** It is difficult for services providers to break free of their heritage; it takes consistent and persistent marketing.
- **Brand Attribute Importance:** Buyers will choose the company who knows them best and can get the job done with the least amount of risk.
- **Perceptions of Services Provider Performance:** Companies with the best performance on the brand attributes that matter most to buyers include IBM, HP, Deloitte, and KPMG. Among the Indian companies, HCL and Wipro are the top performers.
- **Outsourcing Trends:** The primary benefit of outsourcing is still "to reduce operational costs." The majority of buyers that are currently *not* outsourcing have no intention of doing so in the near future; however, one-third of those that currently outsource expect to outsource even more.

Study Scope

ITSMA's *2010 Professional Services and Solutions Brand Tracking Study* provides a balanced look at measures of:

- **Brand equity.** Awareness, familiarity, preference
- **Market positioning.** Brand attribute perception and message relevance

(Continued)

The 2010 study also provides new data and analysis on key areas, such as:

- **Outsourcing trends.** What has been the impact of the economic downturn on outsourcing views and buying decisions? Which companies are already outsourcing infrastructure, application management, and business processes? What are their future buying intentions?
- **Services decision influences.** When there are a number of qualified providers, what is needed to stand out? What are the triggers to switch providers?
- **Perceived areas of competitive differentiation. Is** what's different really different? Does it matter?
- **Market knowledge.** Who are the leaders and followers? Are providers recognised for their services capabilities?

In addition, the qualitative interviews explore in depth buyers' definitions and perceptions of services provider attributes, including:

- Innovation
- Thought leadership
- Proactive
- Business transformation partner
- Value-centric
- Employee empowerment

Companies Covered

The report included detailed data for the following 13 professional services and solutions firms: Accenture, Capgemini, Cognizant, CSC, Deloitte, HCL, HP, IBM Global Services, Infosys, KPMG, Mahindra Satyam, TCS, and Wipro.

Study Methodology

Between May and July 2010, ITSMA completed telephone-based interviews in the US, the UK, France, Germany, Brazil, and Australia with 510 IT and business executives who either provide input into or authorise the purchase of IT professional services and solutions. The interviews were designed to assess the brand awareness and market positioning of the major industry services providers and explore key market drivers.

In addition, ITSMA conducted 25 qualitative interviews with buyers.

For the purposes of this study, ITSMA defines professional services as:

> *Technology and/or related business services (such as consulting, systems integration or implementation, or outsourcing) valued at $100,000 or more.*

Study respondents all held director, vice president, or C-level positions and represented organisations in seven major industries with revenue or operating budgets ranging from $100 million to over $20 billion.

This sponsored research initiative represents the 10th iteration of ITSMA's flagship brand awareness and tracking study focusing on IT professional services and solutions.

Respondent Demographics

Respondent Titles	
Director	48%
CXO, such as CIO, CEO or COO	26%
General Manager/President	14%
VP/Assistant VP/Senior VP	12%
Organisation Size	
$100–299M	7%
$300–499M	24%
$500–999M	16%
$1–4.9B	22%
$5–9.9B	7%
$10–20B	7%
>$20B	18%
Industry	
Manufacturing	20%
Financial Services	16%
Communications	16%
Government/Public Sector	15%
Healthcare	14%
Energy/Utilities	14%
Life Sciences	5%

More Information

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ITSMA

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