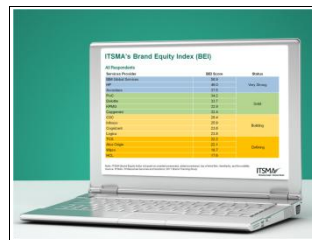


Professional Services and Solutions



2011 Brand Tracking Study

Strong brands are getting stronger; the rest are stagnating. Yet, there remains plenty of opportunity for services and solutions providers in the middle of the pack to gain ground in terms of brand equity and market positioning. It just takes consistent and persistent marketing.

REPORT HIGHLIGHTS

OVERVIEW

ITSMA's *Professional Services: 2011 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.

ITSMA has been of conducting the Professional Services Brand Tracking study for more than a decade, and continues to see strong brands get stronger. While the 2011 study results reinforced the dominance of a few leading brands, it also revealed plenty of opportunities in the market. Highlights include:

- **Brand Awareness:** IBM tops the list for the 11th year in a row for unaided awareness, and HP has secured its position in the #2 spot after vaulting ahead of Accenture for the first time in the 2010 study.
- **Market Positioning:** It is difficult for services providers to break free of their heritage; it takes consistent and persistent marketing.
- **Brand Attribute Importance:** Buyers continue to choose the companies who know them best and can get the job done with the least amount of risk and cost.

- **Perceptions of Services Provider Performance:** Companies with the best performance on the brand attributes that matter most to buyers include Deloitte, PwC, Accenture, IBM, HP, and KPMG. Among the Indian companies, TCS is the top performer.
- **Outsourcing Trends:** Outsourcing is an area of opportunity for services and solutions providers. More than half the respondents think that investing more in technology or business process outsourcing and consulting better prepares organizations for economic fluctuations, and one-third plan to increase spending on outsourcing.

STUDY SCOPE

ITSMA's *2011 Professional Services and Solutions Brand Tracking Study* provides a balanced look at measures of:

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

Continued»

The 2011 study also provides data and analysis on key areas of buyers' behavior, including:

- **Outsourcing and Consulting trends.** What has been the impact of the fluctuating economy on investing in outsourcing or consulting? What are their future buying intentions?
- **Services decision influences.** When there are a number of qualified providers, what is needed to stand out?
- **Perceived areas of competitive differentiation.** Is what's different really different? Does it matter?
- **Market knowledge.** Who are the leaders and followers? Are providers recognized for their services capabilities?

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

- **Partnering with service providers.** What does it mean to buyers to partner with a service provider? How important is this?
- **Client advisory boards.** Do buyers participate on client advisory boards or councils? What do they get out of it?

COMPANIES COVERED

The report includes detailed data for the following 15 professional services and solutions firms: Accenture, Atos, Capgemini, Cognizant, CSC, Deloitte, HCL, HP, IBM Global Services, Infosys, KPMG, Logica, PwC, TCS, and Wipro.



STUDY METHODOLOGY

Between August and October 2011, ITSMA completed telephone-based interviews in the US, the UK, France, Germany, Brazil, and Australia with 460 IT and business executives who either provide input into or authorize the purchase of IT professional services and solutions. The interviews were designed to assess the brand awareness, market positioning, and brand attribute performance 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 organizations in seven major industries with revenue or operating budgets ranging from \$100 million to over \$20 billion.

This sponsored research initiative represents the 11th iteration of ITSMA's flagship brand awareness and tracking study focusing on IT professional services and solutions.

RESPONDENT DEMOGRAPHICS

Respondent Titles	
Director	45%
VP/Assistant VP/Senior VP	12%
General Manager/President	15%
CXO, such as CIO, CEO or COO	28%
Organization Size (USD)	
\$100-299M	12%
\$300-499M	36%
\$500-999M	15%
\$1-4.9B	18%
\$5-9.9B	7%
\$10-20B	4%
>\$20B	9%
Industry	
Financial Services	15%
Manufacturing	20%
Communications	14%
Government/Public Sector	15%
Healthcare	15%
Energy/Utilities	12%
Retail	11%

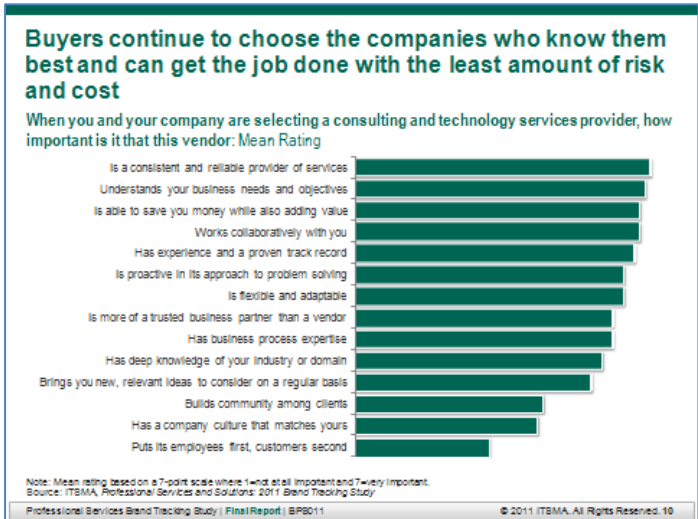
MORE INFORMATION

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PS Brand Tracking Study Intranet License	\$5,000	\$7,500

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