# Keeping it Real

The *Hub's* second annual "battle of the brands" survey yielded many interesting patterns and valuable insights into some of the world's greatest brands. After all, the *Hub's* readers are a highly involved segment of marketers who think about things like brand identity all day long.

The survey simply pitted a total of 29 brands in a series of one-on-one matchups and asked respondents to decide which one of the two had the stronger identity. While celebrity brands were included to keep things light, it was fun to see parallels between branding products and people, the latter best left to our very distant Hollywood-talent-agent cousins.

Authenticity permeates today's culture. In the "reality TV" category, *American Idol,* a show that transforms real everyday people into celebrities, walloped *Dancing With The Stars,* whose contestants come in as made celebrities. Readers also favored brands staying true to their brand identities. Apple's 40 percent victory margin over Google in the "innovation" category may be explained by its having a brand identity fully steeped in innovation; from its game-changing product innovations associated with personal creativity to its retail experience and brand communications.

While Google has made inroads on consumer product innovation (YouTube, Android) its brand is still most widely experienced as the dominant search engine and online advertising model, which are less associated with personal creativity than, say, an iPad. In fact, recent press about privacy and anti-trust concerns related to Google's lack of net neutrality may have adversely impacted its brand identity among survey respondents.

That Dove's *Campaign for Real Beauty,* which is all about authenticity and includes self-esteem programs for girls, was the hands down winner in its social responsibility contest is partially explained by the cohesive fit between these charity programs and Dove's product category (surely an awareness advantage also helped). The Pepsi *Refresh Project,* which is funding "refreshing ideas that change the world," links to Pepsi's products through the word "refreshing" but other than that seems to be more of an organizational values play than an extension of Pepsi's young and spirited brand personality.

Ralph Lauren's 60 percent margin of victory over Tommy Hilfiger is ostensibly due to the latter's product offering migrating away from its core identity. The Hilfiger brand, conceived as a youthful twist on American classics, became ubiquitous and overexposed after expanding into streetwear, accessories, fragrances, and home decor. The good news for Tommy is that he has been able to course-correct by going back to its preppy basics (the brand recently sold to Phillips-Van Heusen for $3 billion).

If excessive "stretch" can jeopardize brand identity, increasing a brand's relevance is a surefire way to protect and strengthen it. One way to drive relevance is to extend the core identity from a functional to emotional plane. Take Walmart's victory in the "mass market" showdown. Walmart used its low price perception as a great foundation upon which to carefully bring elements of values-based marketing into its brand message.

The *Save Money. Live Better.* brand promise added an emotive element to Walmart's brand value identity, successfully evolving its connection with shoppers. That said, Microsoft has also made nice progress evolving its brand personality not by defending its dominance over the workplace operating system, but by showing it was also in touch with everyday people.

That the everyday people used in Windows 7 TV spots are portrayed by beautiful models in the flashback sequences depicting their "aha!" moment is a subtle response to Apple's use of Justin Long and John Hodgman to juxtapose its down-to-earth brand personality versus Microsoft's supposedly stuffy one.

Shopper Marketing is, of course, another way to strengthen brand identity via relevance by

## Authenticity and relevance make the difference for the world's strongest brands.

adapting messages to specific shoppers and shopping environments. Survey winners Tide and Dove have done a particularly good job in this regard.

This year's survey also captured how value-oriented brand identities can thrive during a conservative economy. Target's value position, much emphasized this year, likely contributed to its victory over Whole Foods. While Merlot's perception as a less flavorful, wine novice's choice made it the subject of disparagement in the popular movie *Sideways* (adversely impacting its sales) its value identity (some of the best California Merlots are under $20) may have resurrected it over Chardonnay, the world's most popular white wine grape.

Being true to the core brand identity is also relevant here. Some brands are not favorable to a price-value orientation. Despite offering several breakfast pairings at discounted prices, Starbucks did not stand a chance in the fast-food category against McDonald's, whose own efforts to extend its value-driven identity into premium coffee have been more successful.

For Starbucks, a more relevant approach to value has been to dial up quality, new occasions and customization, as it is with its current VIA Ready Brew and However-You-Want-It-Frappuccino pushes. Similarly, Patagonia, which edged out LL Bean in the "outdoor/lifestyle" category, has had its best two years not by launching new lines or lowering prices, but by staying true to its quality heritage.

Finally, while both detergent and oral categories are recession resistant, Tide's quality-value identity helped secure its victory over Crest in the P&G showdown and could end up making it a formidable competitor in the dry-cleaning service business (P&G is looking to open franchised dry-cleaning locations in Cleveland and Atlanta).

Brands with considerable awareness in mature categories with little room for innovation may strengthen their identities by repositioning around value. After all, this happens constantly in the world of celebrity, where yesterday's Academy Award nominated actress is today's made-for-television-movie star (Winona Ryder, for instance).

All else being equal, brands offering differentiating and meaningful shopping or consumption experiences seemed to fare better in their respective brand battles. Apple's involved shopping experience strengthens its brand identity. Surely Nike's landslide victory over Adidas was driven in part by Niketown's history of retail-tainment and in-store events.

Patagonia's stores are never in proximity to malls or shopping complexes, which drives destination trips. Store events and demonstrations are very common. The company even leverages social media at the store level, each location with its own Facebook page, expounding not only on store offers and local events, but also lifestyle commentary that fosters a sense of shared values and community.

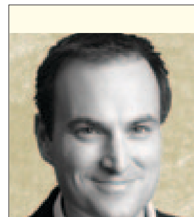
Finally, while Keith Richards ran uncontested as "rock star" and Elvis emerged victorious over MJ in the "late and great" category, I like my write-in candidate, Jerry Garcia in both categories. After all, The Grateful Dead's brand-identity is intact 15 years after Jerry's passing due in part to its experiential consumption model.

The band cultivated a loyal audience relationship with a festival-like environment, encouraged sampling (permitting fans to record concerts), and served up a customized (highly improvisational) product that could adapt to different contexts.

This model undoubtedly contributed to its popularity across age and socioeconomic segments and longevity (what other band has its own satellite radio station and ice cream flavor)?

Given that consumption experience is such a critical factor to reinforcing band — er, brand identity — it's not surprising that event marketing and in-store sampling have such a strong impact on sales and brand/retailer perception.

Untapped potential exists in experiential's ability to make stronger brand-building connections and provide a more enduring impact through better branding opportunities and product selling. But this is something we plan to talk about more in the next issue! ■



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# Compared

**Our second annual survey on brand identity reveals big gaps between strong brands.**

Who has the stronger brand identity for innovation: Apple or Google? It might seem a tough choice, a close call. “Google is more innovative, but Apple has a rock-solid brand,” said one of our survey respondents. “Apple gets more PR, but Google is changing the way we think,” said another.

But in the end, it was no contest: Apple was deemed more innovative, 70 percent to 30 percent. The lopsided pattern continued through a series of matchups between a range of brands, all of which arguably enjoy strong identities.

Among retail brands, Target bested Whole Foods, 73-27 percent. Hertz beat Avis in car rental, 69-31. It was the iPhone over the BlackBerry, 75-25 and Nike over Adidas, 86-14. In every instance, respondents made a good case for the losing brand:

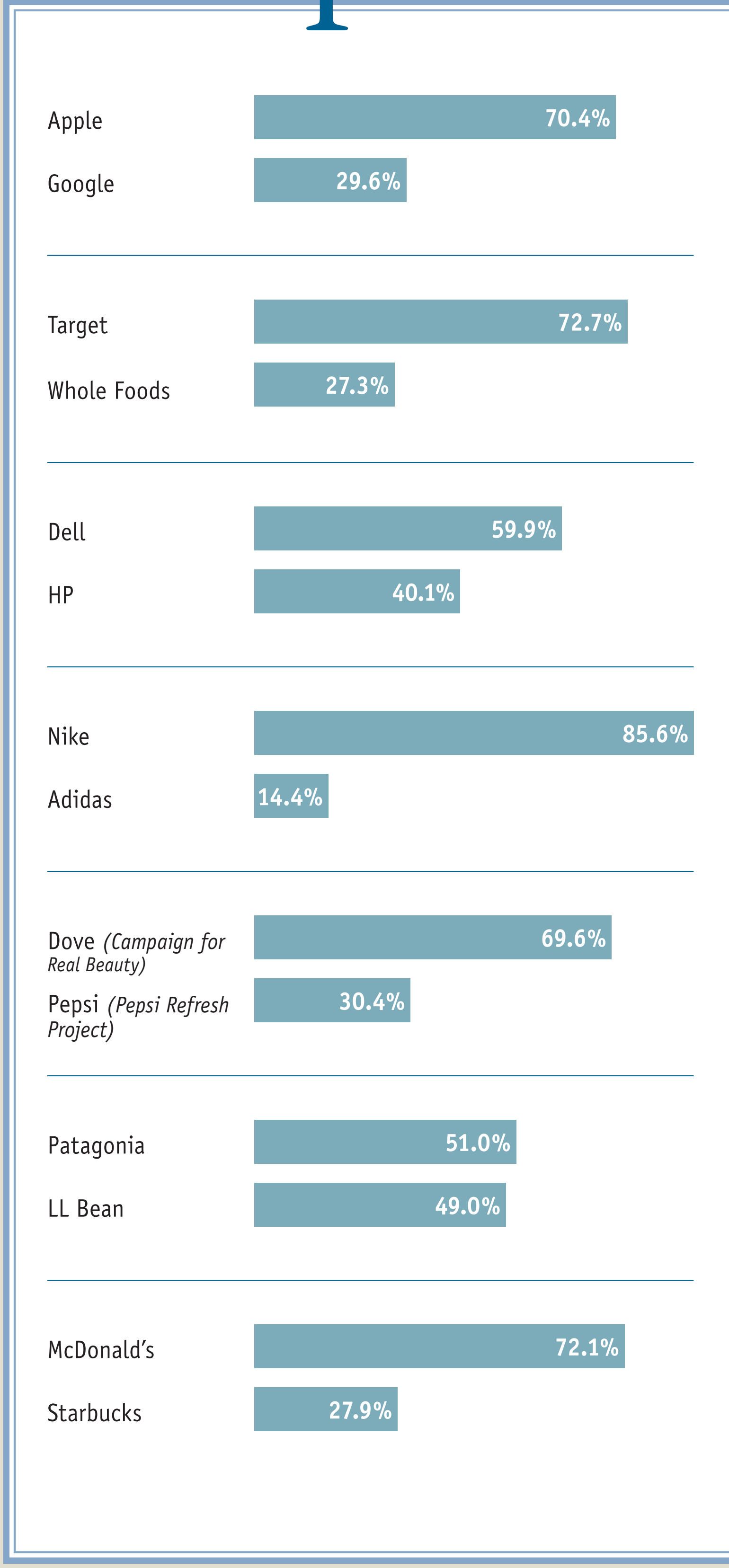
- “Target is just a red Walmart. Whole Foods revolutionized an entire industry.”
- “Adidas quality has kept pace with its expense, Nike has not.”
- “Hertz may be bigger but Avis has the stronger brand identity.”
- “The iPhone is a superior product but the term ‘blackberry’ has become the ‘kleenex,’ ‘scotch tape’ and ‘xerox’ of its industry.”

Opinions were not quite as polarized in the “personal computers” category, in our Dell versus HP duel, although Dell prevailed handily, 60-40 percent. Several respondents noted that they think of HP as printers, not computers.

In breakfast cereals, Wheaties edged Corn Flakes, 56-44 percent, however some said that “corn flakes” isn’t really a brand — which is true and makes the closeness of the result that much more interesting.

The closest contest of all was between Patagonia and LL Bean. Out of 551 votes cast, only 11 separated the two, and the lead changed several times during the course of the survey. Patagonia squeaked it out, though, 51-49 percent.

Some of our matchups were intentionally unconventional, pitting non-competitors against each other: Starbucks doesn’t compete with McDonald’s in the same sense as Burger King,



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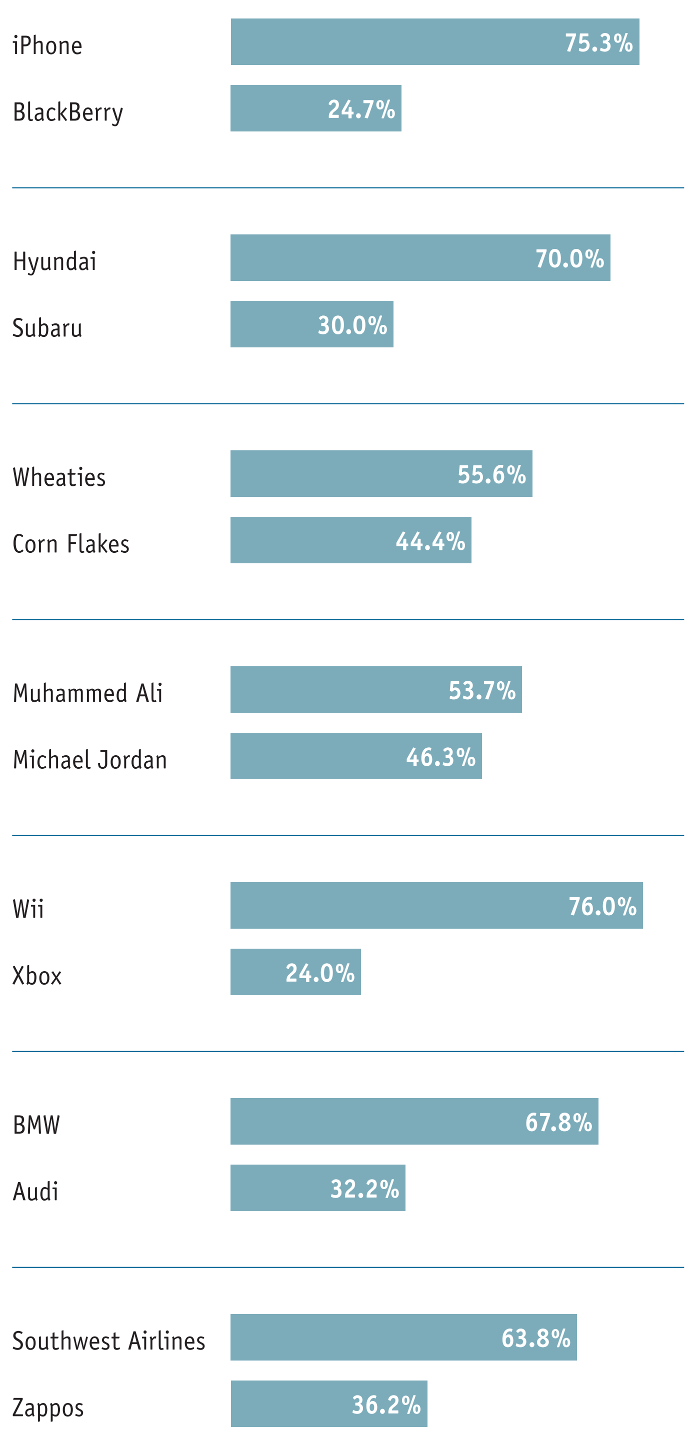


*Survey results:* http://hubmagazine.com/survey/brands_2010

but it is in the "fast food" business, for example. Some took issue with that view, which may at least partly explain why McDonald's came out on top, 72-28 percent. Others simply noted the iconic power of the Golden Arches.

We also pitted Walmart against the Prius, given that both pursue identities as "green" brands. Perhaps predictably, it was no contest: Prius, 86-14 percent. Walmart fared better in its contest against Microsoft—in that both identify as mass-market brands—with Walmart in a walk, 77-23 percent.

With tongue firmly in cheek, we paired Facebook against the Central Intelligence Agency. Not sure what to make of this result, but Facebook came out way ahead, 72-28 percent. This may not be such a good thing for Facebook, given its issues with privacy lately.

We matched some personal brands, as well: Lady Gaga over Taylor Swift, 68-32 percent; Elvis Presley over Michael Jackson, 65-25 percent; and Barack Obama over Steve Jobs, 55-45 percent. It was a tighter contest between Muhammed Ali and Michael Jordan, with the decision going to Ali, 54-46 percent. That's also interesting, given the relative lack of Ali merchandising.

However, the tightest contest of all was in the "rock star" category, between Keith Richards and Keith Richards, with each Keith taking exactly 50 percent. Despite 136 comments, no consensus alternative was evident. A few votes for Mick, but c'mon. Case closed.

We wrapped up with the ultimate, open-ended question of which brand has the strongest identity of all. Just like last year, *Coke Is It* (35 percent), followed by Apple (16 percent) with Nike and McDonald's at four percent each. The keywords were: Ubiquity (Coke); Innovation (Apple); and Iconography (Nike & McDonald's).

Three percent picked "religion" in some way, shape or form and two percent mentioned the United States of America. Just a handful of votes for Microsoft, Walmart, Google and Starbucks. Oh yeah…and one vote for Keith Richards!

### Respondent Profile

A total of 560 survey respondents included brand marketers (20%), consulting firms (19%), and agencies (19%). A majority were senior-level executives with 77% reporting more than ten years of experience in marketing.