

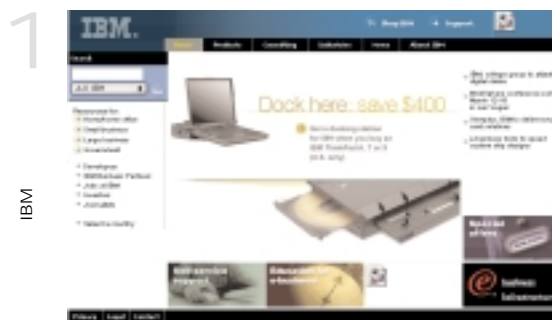
Global

eLEAGUE REPORT
2nd NOVEMBER 2000

Global brand owners are beginning to recognise the need for a strong Internet presence alongside their offline proposition. In the second survey compiled exclusively for Marketing Week, digital consultancy

“beginning to recognise the need for a strong internet presence”

BrandNet has collected information on the top 25 global brands, based on the Interbrand/Citibank league table, to evaluate their use of the Web. The 25 brands have been reordered according to the quality of their websites.



IBM

As well as testing these sites individually, 21 have been divided into three main categories – technology, car and packaged goods brands - to compare how sectors are mastering the digital world as a marketing medium. Overall, most of the top five brands in Interbrand's league are similarly ranked in the Top 25 BrandNet table. Not surprisingly, the technology sector seems to have mastered the art of digital communication faster than its old economy rivals.

“the technology sector seems to have mastered the art of digital communication”

The top four global technology brands - IBM, Intel, Microsoft and Nokia - provide access to a rich and varied content, most of a similar nature, delivered in plain English. This allows people with a thirst for knowledge as well as experienced technology boffins to access a deep mine of information easily.

IBM, which is placed third in Interbrand's league, will be delighted to come out in first place for BrandNet's league - particularly at a time when rival global computer giants such as Hewlett-Packard and Compaq are also throwing millions of pounds at marketing campaigns to reinvent their brand as key Internet network and service providers. IBM's site offers easy navigation, online shopping and information for consumers and businesses, presented in plain language. If the site does have a drawback, it is the lengthy user survey which offers no incentive or reward for completion. As minor as this

www.ibm.com	81.81
FINDING THE SITE	20.00
NAVIGATION	18.89
CONTENT	13.60
DELIVERY OF PROPOSITION	14.00
MEMORABILITY	15.32

Only site to offer auto-detection, automatically tailoring content to users' nationality. Great consultancy section, but user surveys were lengthy with no reward or incentive.

may sound, it is an important consideration in attracting people to the site in a very competitive market. IBM and Microsoft provide the best content and information about developing and marketing through digital media. Intel offers simplified information on which computers would best meet a consumer's particular needs and where to buy them.

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BrandNet managing director Spencer Wright says: "Our Top 25 global brands website league shows that technology brands are the best at using online media and ensuring it translates messages given out through traditional media. They have more content and information, and compared with other sectors they have learned how to understand

"not all technology companies fared well in the table, however"

users, market to their needs and deliver useful Web initiatives that are less confusing, adding local market variations."

The recent launch of Sony's pan-European PlayStation2 website (MW October 5) is a good example of Wright's view. Although the survey claims localisation of content at Sony.com is "disparate", the company has brought in marketing managers across different European countries to make sure information is tailored to local users.

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Intel



Not all the technology companies fared well in the table, however. Hewlett-Packard was criticised for being too US-focused and failing to aim content at specific demographic groups.

Packaged goods brands were pushed down the table by their more Net-savvy technology rivals. Coca-Cola - Interbrand's number one brand - ranked only 12th in BrandNet's league, only just holding off Microsoft. Coca-Cola's content is uninspiring and lacks features such as video and sound. It is unusual to see such a big name not being more adventurous online, though Pepsi's decision to appoint its first global e-marketer may force Coke's hand towards updating the site.

Wright says: "It's a shame. Simple things like Coca-Cola not providing advertising material within the historical section or the lack of links to other market websites does little to inspire the user to revisit, especially when the UK site has one of the best online propositions."

The only brand from Interbrand's top 25 league not to have an online presence is from the packaged goods sector - Marlboro cigarettes. The brand has no site flagging up the company or its spin-off clothing range, which puts it at a distinct disadvantage. And, without a corporate Web presence, search engines tend to find anti-smoking information instead of the Marlboro brand.

Global giants like McDonald's are criticised for not offering enough features to attract children, a major consumer group for the fast-food chain. The key point about packaged goods brands is that they appear to offer limited information and interactivity. What there is is not tailored to suit different demographic groups.

But the success story of this category was Kodak. Ranked 24th in the Interbrand league, Kodak is the seventh top global brand website, according to BrandNet. Wright adds: "The site allows users to upload images into their own online portfolio, send e-cards, order prints and edit pictures. It extends the brand's reach and provides revenue to cushion any future loss of film sales."

www.intel.com	80.35
FINDING THE SITE	20.00
NAVIGATION	16.67
CONTENT	15.20
DELIVERY OF PROPOSITION	14.67
MEMORABILITY	13.81

Excellent use of media. Simple and precise site delivering brand authority.

Sites in the third category - car brands - are hit-and-miss on the Net. BMW and Mercedes have got the balance right by providing local sites, whereas Honda and Toyota's main sites have no local links. Most brands scored poorly on content: it was confusing and did not offer all the services which would attract motorists to a site, such as ordering and test-drive facilities. Ford is trying to steer its UK e-commerce division in the right direction, launching Fordjourney.com to offer deals on a range of models.

Once again, old economy brands are lagging behind technology companies when it comes to marketing through new media. Packaged goods brands' poor showing on the Net, as revealed in the first Marketing Week/BrandNet survey (MW September 28), is also apparent in this month's league table. Packaged goods brand owners need to sharpen their Net mentality to redress the balance against technology companies.

Microsoft		www.microsoft.com	76.51	3
		FINDING THE SITE	18.33	
		NAVIGATION	16.67	
		CONTENT	12.80	
		DELIVERY OF PROPOSITION	14.67	
		MEMORABILITY	14.04	
		<i>Good communication discipline between the divisions. Local market sites seem to be one generation behind in functionality and layout.</i>		
Nokia		www.nokia.com	75.92	4
		FINDING THE SITE	20.00	
		NAVIGATION	15.56	
		CONTENT	12.80	
		DELIVERY OF PROPOSITION	12.67	
		MEMORABILITY	14.89	
		<i>The best use of promotional synergy across all media should happen with the Nokia game, if only the prizes were more inspiring.</i>		
Disney		www.disney.go.com	75.0	5
		FINDING THE SITE	16.25	
		NAVIGATION	15.55	
		CONTENT	14.20	
		DELIVERY OF PROPOSITION	14.50	
		MEMORABILITY	14.50	
		<i>Links and content from Disney.com are massive; all sub-sites are consistent with branding and navigation.</i>		
Mercedes		www.mercedes.com	71.23	6
		FINDING THE SITE	20.00	
		NAVIGATION	16.67	
		CONTENT	10.40	
		DELIVERY OF PROPOSITION	12.67	
		MEMORABILITY	11.49	
		<i>32 local market sites to visit which are all immediately identified from the global home page. Clear and simple navigation but no facility to organise a test-drive.</i>		
Kodak		www.kodak.com	70.83	7
		FINDING THE SITE	18.18	
		NAVIGATION	14.44	
		CONTENT	11.20	
		DELIVERY OF PROPOSITION	14.67	
		MEMORABILITY	12.34	
		<i>Magazine style site that upholds brand essence. Has one of the biggest tasks in redefining its corporate revenue stream when digital technology replaces film completely.</i>		
Compaq		www.compaq.com	70.53	8
		FINDING THE SITE	18.43	
		NAVIGATION	13.33	
		CONTENT	12.00	
		DELIVERY OF PROPOSITION	14.00	
		MEMORABILITY	12.77	
		<i>Full product listing, where to buy, service and support, etc. Uses the media well to provide local information, especially the partner and service support.</i>		
Sony		www.sony.com	70.08	9
		FINDING THE SITE	20.00	
		NAVIGATION	12.22	
		CONTENT	12.00	
		DELIVERY OF PROPOSITION	12.67	
		MEMORABILITY	13.19	
		<i>US-focused site with links to local markets. Good music, video, entertainment sub-categories that provide home page portals for targeted audiences.</i>		
McDonald's		www.mcdonalds.com	68.07	10
		FINDING THE SITE	20.00	
		NAVIGATION	13.33	
		CONTENT	11.20	
		DELIVERY OF PROPOSITION	13.33	
		MEMORABILITY	10.21	
		<i>McDonald's fun land has great potential for interactive TV but the site itself is not very inspiring for kids. Little interaction and few incentives.</i>		

	brand	iSET	address	note
1	IBM	81.8	www.ibm.com	Location auto detection. Great consultancy section but user surveys were lengthy with no reward or incentive.
2	Intel	80.3	www.intel.com	Excellent use of media. Simple and precise site delivering brand authority.
3	Microsoft	76.5	www.microsoft.com	Good communication discipline between the divisions such as software, support etc. Local market sites seem to be one generation behind in functionality and layout.
4	Nokia	75.9	www.nokia.com	The best use of promotional synergy across all media should happen with the Nokia game, if only the prizes were more inspiring.
5	Disney	75.0	www.disney.go.com	Links and content from disney.com are massive; all sub sites are consistent with branding and navigation.
6	Mercedes	71.2	www.mercedes.com	32 Local market sites to visit which are all immediately identified from the global home page. Clear and simple navigation but no facility to organise a test-drive.
7	Kodak	70.8	www.kodak.com	Magazine style site that upholds brand essence. Have one of the biggest tasks in redefining their corporate revenue stream when digital technology replaces film completely.
8	Compaq	70.5	www.compaq.com	Full product listing, where to buy, service and support etc. Uses the media well to provide local information, especially the partner and service support.
9	Sony	70.0	www.sony.com	US focused site with disparate links to local markets. Good music, video, entertainment sub-categories that provide home page portals for targeted audiences.
10	McDonalds	68.0	www.mcdonalds.com	McDonalds fun land has great potential for interactive TV but the site itself is not very inspiring for kids. Little interaction, part planners or incentives.
11	Heinz	67.8	www.heinz.com	Good company history but site map doesn't show. co.uk. Limited ads are mostly U.S focused. Allergies section only told me about products that I could use.
12	Coca-Cola	67.7	www.coca-cola.com	Simple navigation but lack of imagery and inspiration. Great time line but would have liked to find ads, video, sound and posters.
13	BMW	66.9	www.bmw.com	Good interface with Go Local; BMW in your country. Option for pricing /information allows global information to be delivered in 41 countries.
14	Hewlett Packard	65.7	www.hp.com	US focused with huge number of local market links all with immediate benefit communications. News service advertised on TV buried deep within site with no top line presence.
15	Cisco Systems	65.6	www.cisco.com	Local market content is out of date and the branding and logo seem to be inconsistent with TV advertising. Good links to resellers, distributors and consultants.
16	American Express	65.4	www.americanexpress.com	Not very inspiring. Lack of historic information and proactive rewards via WAP/SMS. Gave up after waiting more than 10mins for a flight price check.
17	Ford	62.2	www.ford.com	No immediate direction to local markets and UK site's build your own car has technical problems. Ford credit planner has a good interface, understanding user profiles.
18	General Electric	61.6	www.ge.com	Copy heavy site lacks simple user navigation. The easy finder utility was buried deep within the site and yet provided quick access to corporate elements of what users would expect to find.
19	AT&T	61.6	www.att.com	Home users have detailed list of packages and services, but again copy heavy and lacking in descriptions.
20	Nescafe	59.5	www.nescafe.com	Once you have selected an option you are unable to look at it again. Limited advertising, historical ads etc.
21	Toyota	58.8	www.toyota.com	Not all the main menu links work. In USA you can choose car, trade it in, get credit, lease deals and arrange delivery. What about the rest of the world?
22	Honda	54.6	www.honda.com	Like Toyota is US focused. History has little imagination and no real links to historical achievements in sport.
23	Gillette	53.0	www.gillette.com	No aspirations or brand equities on display, all content details in the pressroom are US only. Lots of investor information with no emotional interaction.
24	Citibank	51.3	www.citibank.com	Page error on location of branches did not instil confidence. If you can not get your message across in the first couple of pages.....
25	Marlboro	0.0		No site or official clothing site could be found.

BrandNet tested websites for the top 25 global brands, based on the Interbrand / Citibank top 60 international brand league table (July 2000).

The overall evaluation is based on how local websites translate the the core global online proposition, content and services.

Date of survey 02 November 2000

Lacking the personal touch:

Marketers are making some fundamental errors in trying to adapt to new media. They are failing to grasp the basic concept of using the power of the medium to build closer relationships with consumers and missing out on building customer databases.

BrandNet's business development manager, Hannah Roberts, claims websites aren't being personalised enough, citing Fiat as an example of a brand with a great TV campaign, which differentiates between the brand's proposition for men and women - but failing to make the distinction online.

"Gillette is another example," she says. "The proposition for women is about product safety and making them feel attractive, while for men it is more about hygiene. That's fine, but Gillette doesn't have two different sections on its website. It's a very simple concept which many brands seem to be missing."

Key notes:

"Technology sites are already way ahead of packaged goods and car brands with their online propositions. Technology brands have learned how to understand users, market to their needs and add local market variations."

"Packaged goods brands have limited information and interactivity, which is not tailored to suit different demographic groups."

"Car brands are hit and miss. BMW and Mercedes have got the balance right by providing local sites, but most car brands scored poorly on content."

iSET's methodology:

Internet Strategy Evaluation Tool (iSET) scores websites on five categories:

Location: Does the site have a logical address, which is visible on-pack and in ads? Is it known by top search engines and the brand customer careline?

Navigation: Can you navigate the site without it crashing or being frustratingly slow?

Content: Is it consistent with the brand's offline, above-the-line marketing message?

Delivery of Proposition: Are the colours and typefaces the same as on the brand packaging?

Memorability: Are there good enough reasons to visit the site? Is it an interactive medium, not just a place to showcase the latest ad campaign?

SO YOU THINK YOU KNOW YOUR CONSUMERS?

FIND OUT WHY CONSUMERS VISIT YOUR WEBSITE
AND WHAT THEY THINK ABOUT IT



The online consumer survey:-

- builds a database of opt-in consumers interested in your brand
- measures functional, emotional and recognition aspects of your brand
- provides realtime access to survey results
- allows demographic filtering of results

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