

AdSAM[®] Emotional Brandscape

TOP OF MIND, NOT NECESSARILY TOP OF FEELINGS FOR A BRAND

BOTTOM TEN BRANDS • 2014



AdSAM[®]
EMOTIONAL RESPONSE MODELING

Bottom Ten Brands – **Executive Summary**

In our research, we found consistent results in which all brands in the bottom ten must take into consideration in the near future.

- These feelings are generally ***Ambivalent**** or ***Indifferent****
- In addition, products in the lower half of the bottom ten generally have more significant negative feelings such as ***Distrustful**** and ***Alarmed****.
- This is an indicator that these brands must take steps to improve consumers' perceptions, or they will continue to experience lackluster growth.
- These findings also confirm that consumers' emotions are an excellent predictor of future behavior. An accurate assessment of emotional reaction is an element that must now be considered in order to acquire a full perspective on consumer's perceptions.



Bottom Ten Brands – **Executive Summary**

Through our surveys, we found that consumer's poor feelings regarding many of the bottom ten brands are due to three factors:

1. Consumers have not heard of the product and therefore remain ***Indifferent**** to the brands.
2. Consumers question the quality and/or taste of the product and feel ***Unexcited**** about the brands.
3. Consumers are unhappy with many of the brands' pricing. Often considered too high considering the quality of the product or level of service.



Among the bottom ten brands, the average five year stock performance is an increase of just 33.25%

- This is in contrast to the top ten brands five year stock performance, which had an average increase in value of approximately 225%
- As a well-regarded indicator of brands' viability in the market place, historical stock market data falling parallel with AdSAM's emotional response data provides an important confirmation of AdSAM's insight as an excellent predictor of consumer behavior
- Therefore, the AdSAM methodology will be an accurate indicator of consumer behavior across all industries, ranging from pharmaceutical to consumer packaged goods

AdSAM[®] Brand Emotion

PRELIMINARY STUDY RESULTS
of Bottom Ten Brands



AdSAM[®]
EMOTIONAL RESPONSE MODELING

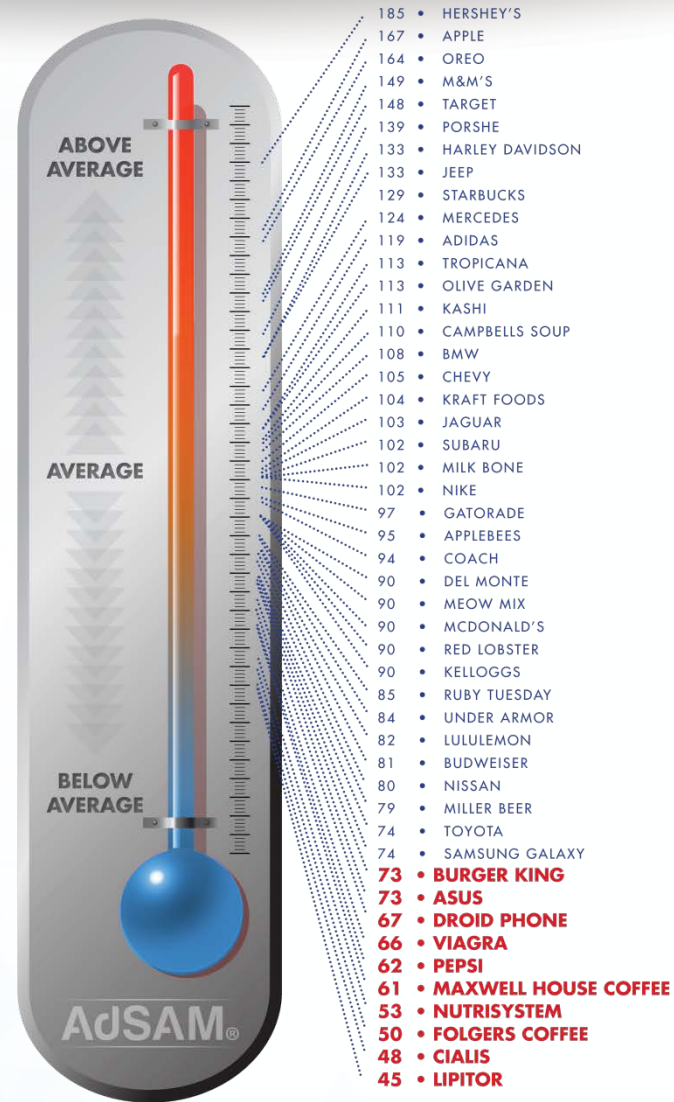
What is AdSAM® and how was it applied to this study?

- AdSAM® measures emotions using a cross-cultural, visual measure, validated over the past 20 years. AdSAM® captures the rich complexity of emotion through simple, proven research methods and delivers clear, concise data to our clients.
- For this study, we asked our business social network friends and clients to suggest brands to measure. The emotional response to those brands was then measured in an online survey of nearly 200 consumers and business people.
- How well do those brands emotionally connect with the general public?
The most Emotionally Connecting Brands are Hershey's, Apple, M&M's, Target & Porsche. The least connecting brands are Lipitor, Cialis, Nutrisystem, Maxwell House Coffee, and Pepsi.

What is AdSAM® and how was it applied to this study?

- In this report we have featured the 10 brands with the weakest emotional connections. Future reports will look at those brands which score more moderately by consumers.
- The discussion of the brand feelings is accompanied by the unique tool, the AdSAM® Emotional Profile™. This process links the measured emotional response connections with the reasoning behind the reactions. Throughout the report, Emotional Profile results are clearly designated by the label “EP”.

- The AdSAM® Emotional Temperature is a comparative index of the emotional strength of concepts, products, brands or other stimuli questions
- An index of 100 is the average of the brands
- Brands that index above 100 have stronger motivating appeal than the other brands measured



**MOST
EMOTIONALLY
CONNECTING
BRANDS.**

**LEAST
EMOTIONALLY
CONNECTING
BRANDS.**

Emotional Temperature is based on the AdSAM® Emotional Strength Index®.

BOTTOM TEN BRANDS



AdSAM®
EMOTIONAL RESPONSE MODELING

2014 Bottom Ten Brands



VIAGRA®
(sildenafil)



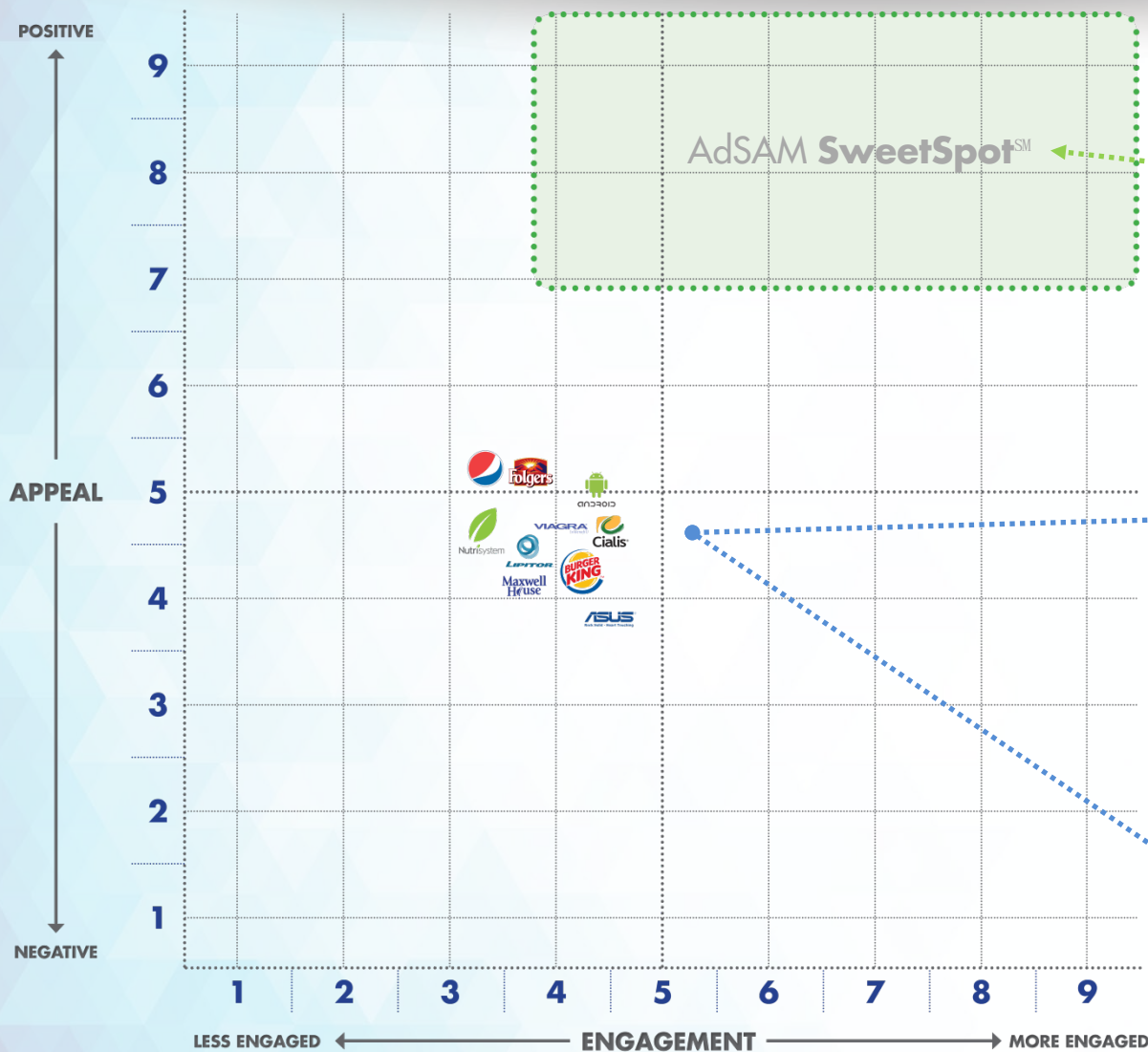
ASUS®
Rock Solid · Heart Touching



Maxwell
House



Bottom Ten Brands' Perceptual Map Indicates Trouble on the Horizon.

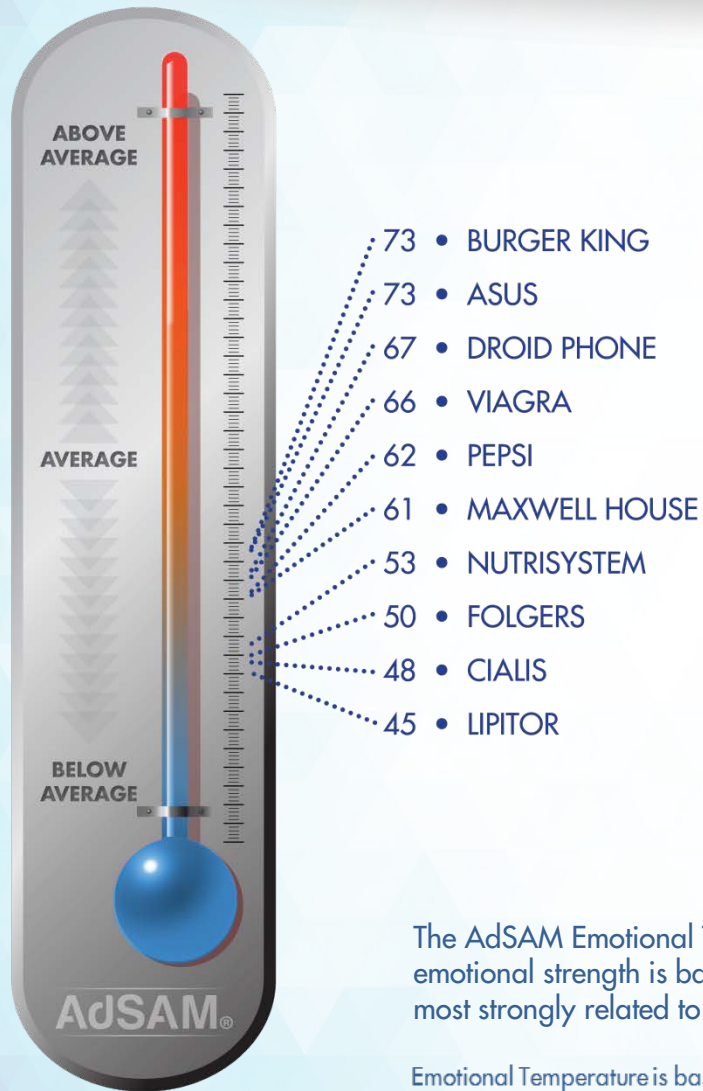


Feelings within the **SweetSpotSM** area of the emotional space (indicated by the blue line) have the strongest link to purchase intent, consideration and brand loyalty. The emotional position of the Bottom Ten brands indicates that the majority of consumers sampled have little inclination to consider or purchase these brands.

While there is some differentiation, the bottom ten brands are clustered close to one another, indicating that consumer's feelings for most of the brands do not differ greatly and score poorly on both appeal and engagement.

Low in both appeal and engagement, the location of the clustered bottom ten brands indicates a significant lack of esteem within the general market. Though many of the bottom ten brands currently retain some semblance of a user base, this declining esteem points to very real trouble on the brands' horizons.

AdSAM®'s Emotional Temperature® - BOTTOM TEN BRANDS



With the lower end of the brands reaching nearly two full standard deviations below the average response, the data plainly shows that the bottom ten brands are suffering from a disconnect from the average consumer.

All of these brands are well below average. While some brands score better than others, even those brands score poorly vs. higher ranking brands.

The AdSAM Emotional Temperature shows the relative emotional strength of each brand. The emotional strength is based on the percentage of respondents who express the type of feelings most strongly related to behavioral intent and/or brand advocacy.

Emotional Temperature is based on the AdSAM® Emotional Strength Index®.

While some still feel positive, most are either **AMBIVALENT**, **SULLEN**, or **ALARMED**.

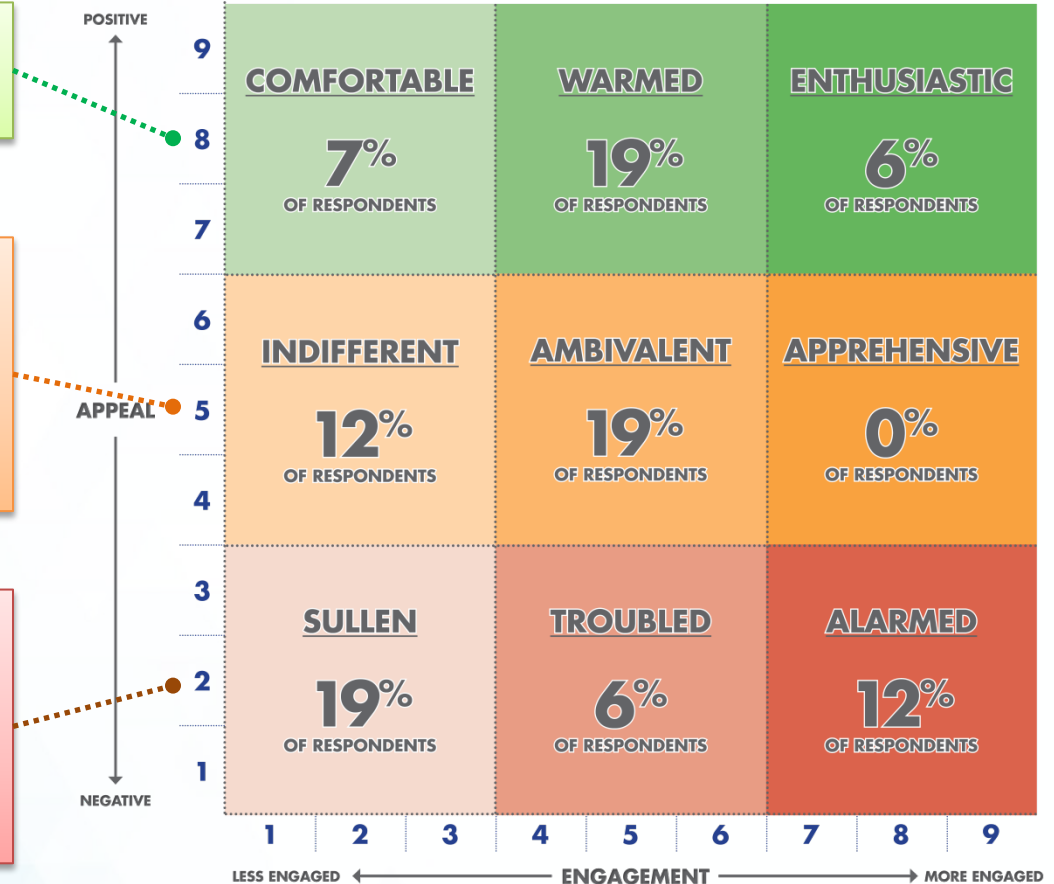
Only 6% of consumer are well engaged with the Burger King brand.

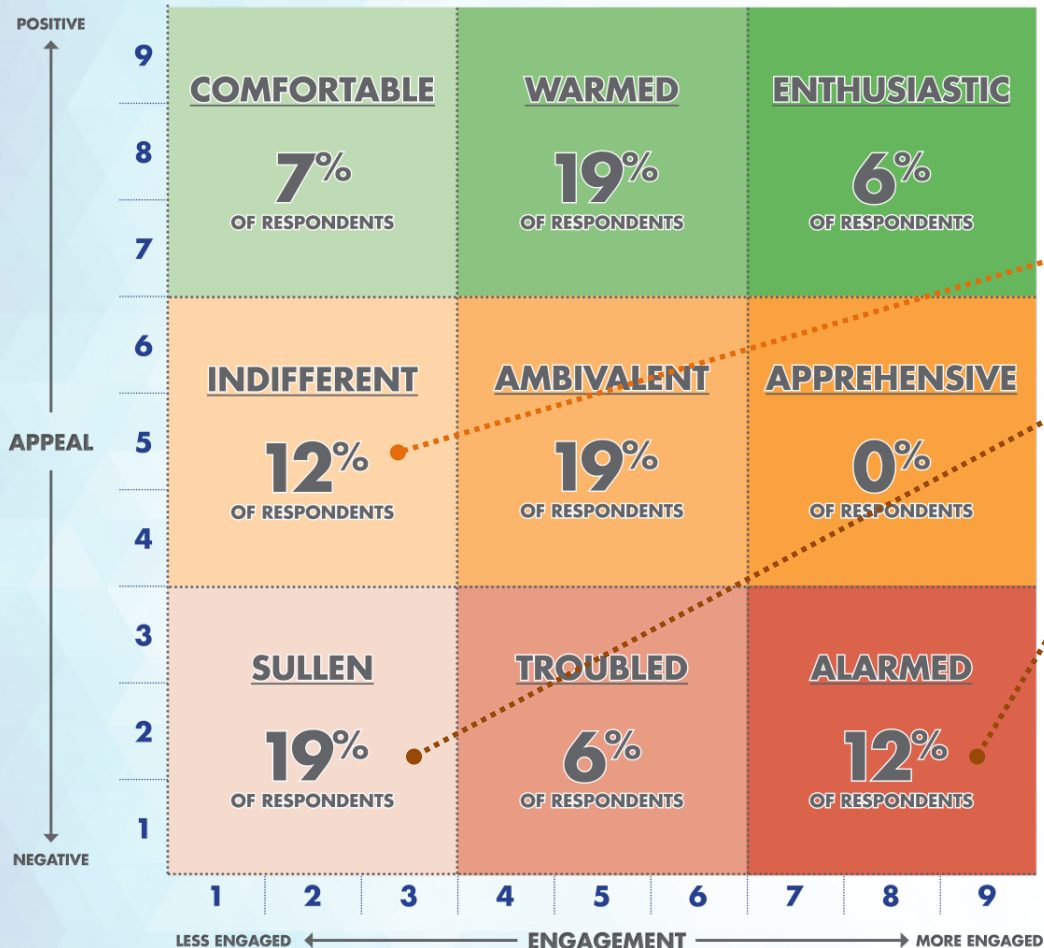
31% of consumers feel either **INDIFFERENT** or **AMBIVALENT** about the Burger King brand.

In addition, consumers feel **Subdued*** and **Cynical*** about the Burger King.

A shockingly high proportion of consumers (37%), have negative feelings.

These consumers feel **Bored***, **Selfish***, and **Aggravated***.





Further insight into our emotional profile statements indicate strong feelings regarding the Burger King brand.

"Burger King is dead to me; nothing healthy on the menu." EP

"Bad food and service." EP

"Poison. Fast Food... Bad!" EP

THE BOTTOM LINE:

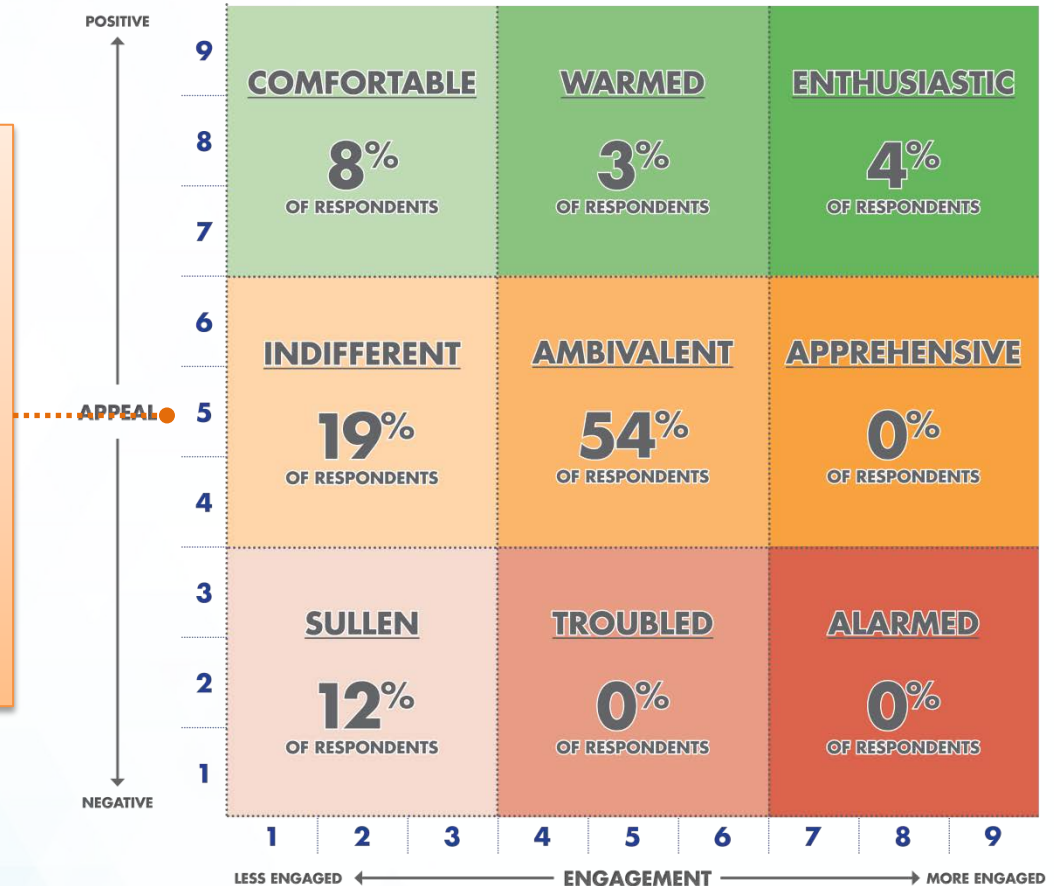
The Burger King brand is in serious trouble. The negative feelings such as ***Sullen**** and ***Alarmed**** are shockingly high. In order to right their ship, Burger King must offer a healthier selection of food.

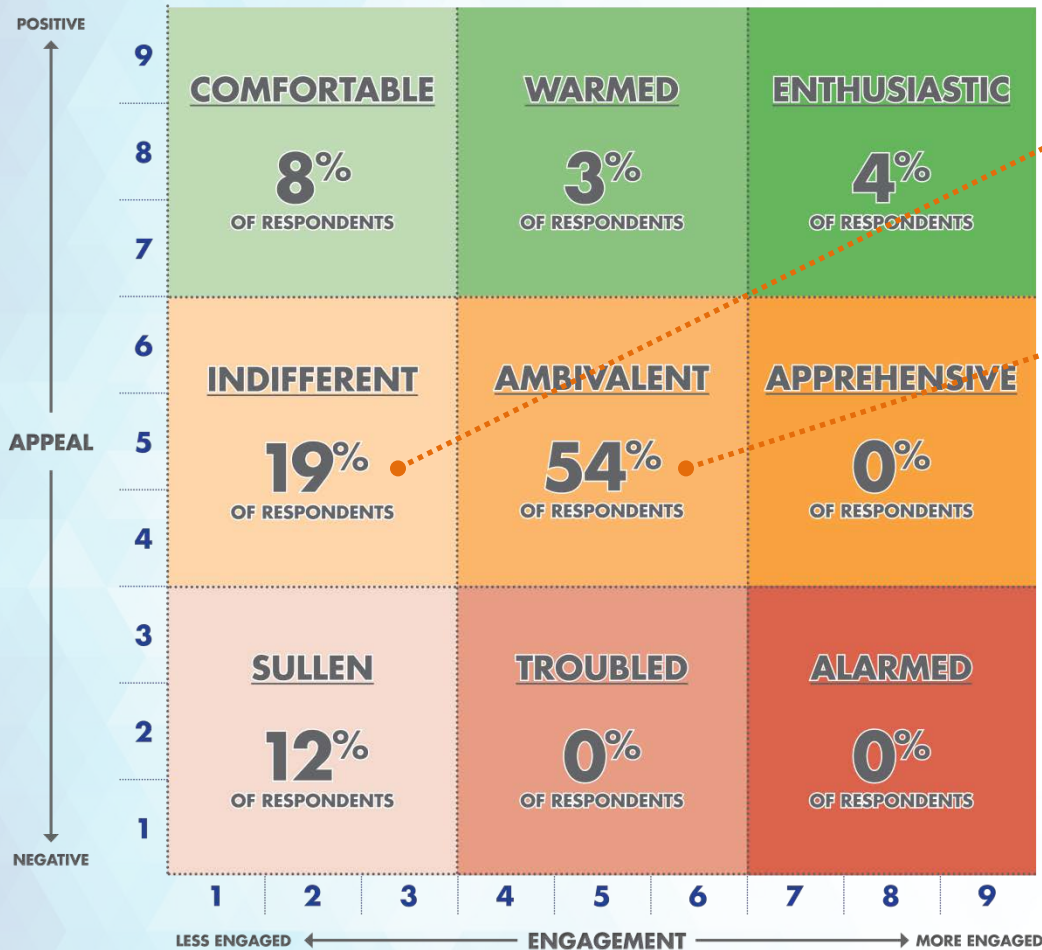


A strong majority of consumers (73%) feel Ambivalent or Indifferent about the Asus brand. Because of this, most consumers have no opinion about Asus.

Because of their lack of familiarity with the Asus brand, In addition to feeling **AMBIVALENT**, more than half (54%) feel **Haughty*** and **Contempt*** for its products.

In addition, consumers feel **Subdued*** and **Unemotional*** about the Burger King.





"I have an Asus. It is a reliable computer that allows me to do what I need to. but it is running out of hard drive space." EP

"Unfamiliar with this brand beyond the fact that they produce electronics of some sort." EP

THE BOTTOM LINE:

Asus will never successfully compete with companies such as Dell & Apple without launching a substantial awareness campaign with a compelling message. It is no wonder that consumer feel **Haughty*** and **Subdued*** about the brand.



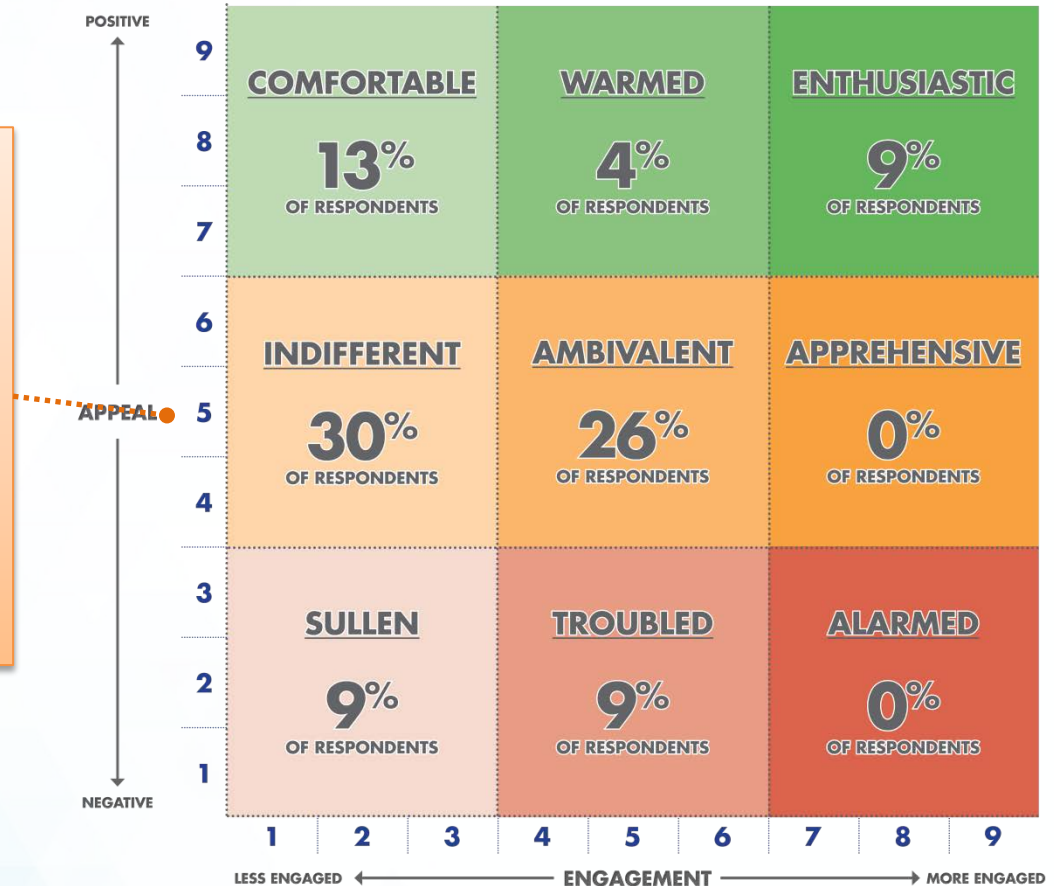
Consumers are aware of the Droid Phone, but...



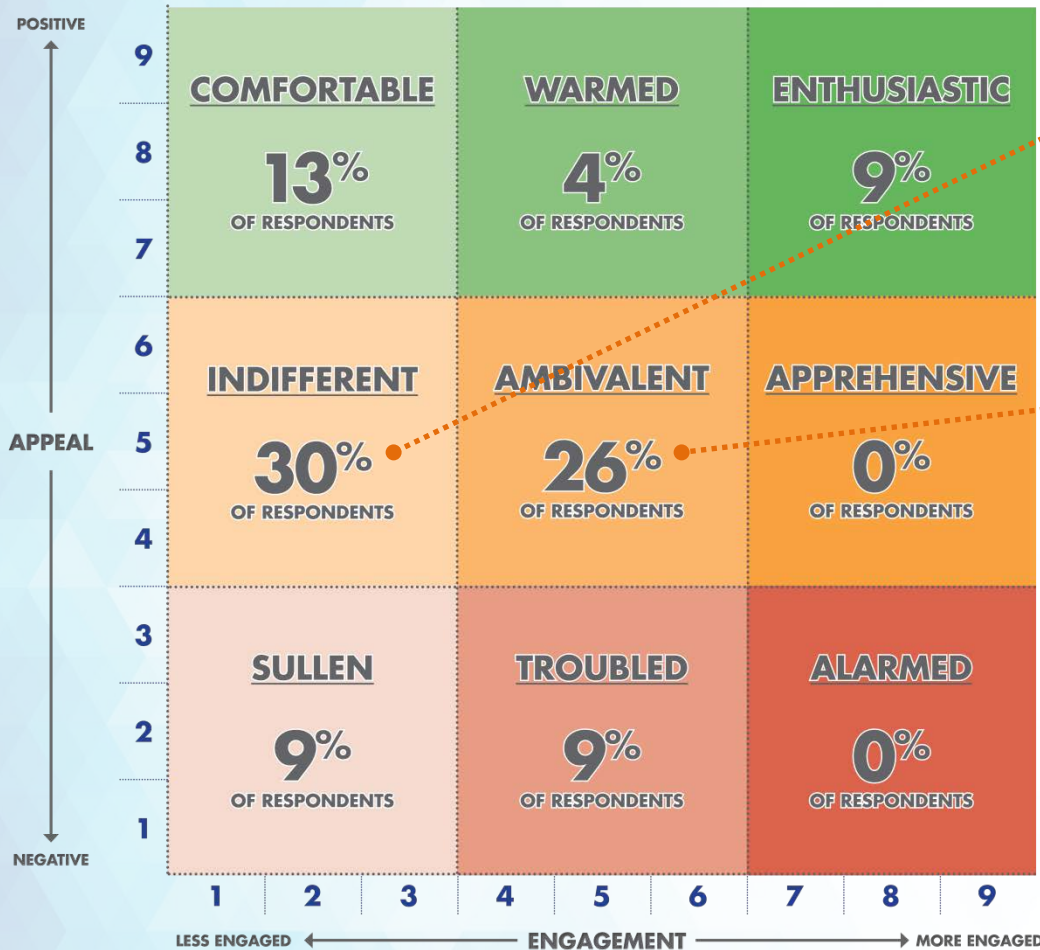
Consumer's feelings about the Droid Phone are not overwhelmingly bad or good, but ambivalent and indifferent because it's overshadowed by the iPhone.

The majority of consumers (56%) have mixed feelings about the Droid Phone.

In addition to feeling **INDIFFERENT** and **AMBIVALENT**, consumers feel ***Cynical**** and ***Sympathetic**** regarding the Droid Phone.



The Droid Phone is a lower tiered brand vs. iPhone



"Although decent. user interface is not as easy to use as iPhone and the OS is not as adaptable for games for my kids or other apps." EP

"Great name...but I never used/owned one...like what I see but the few people I know that own one have mixed opinions...the data plans make me crazy." EP

THE BOTTOM LINE:

The Droid Phone will never compete at the level of Samsung's Galaxy or the iPhone by offering only "run of the mill" features.

Consumers feel **Uninterested*** and **Cynical*** about the brand.



With almost no enthusiastic supporters, most consumers range from **Dubious*** to **Irritable*** about Viagra.

Only 23% of consumer have interest in or need a vasodilator like Viagra.

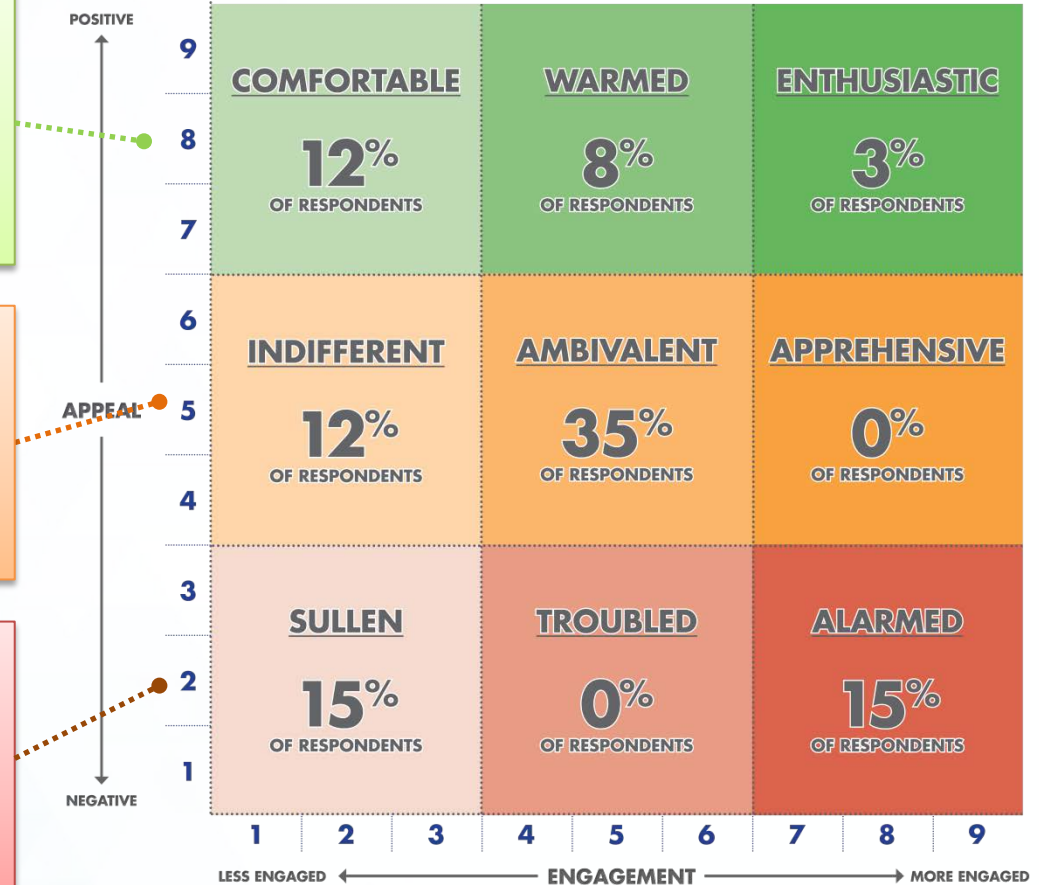
These consumers feel **Relaxed***, **Appreciative***, and **Victorious***.

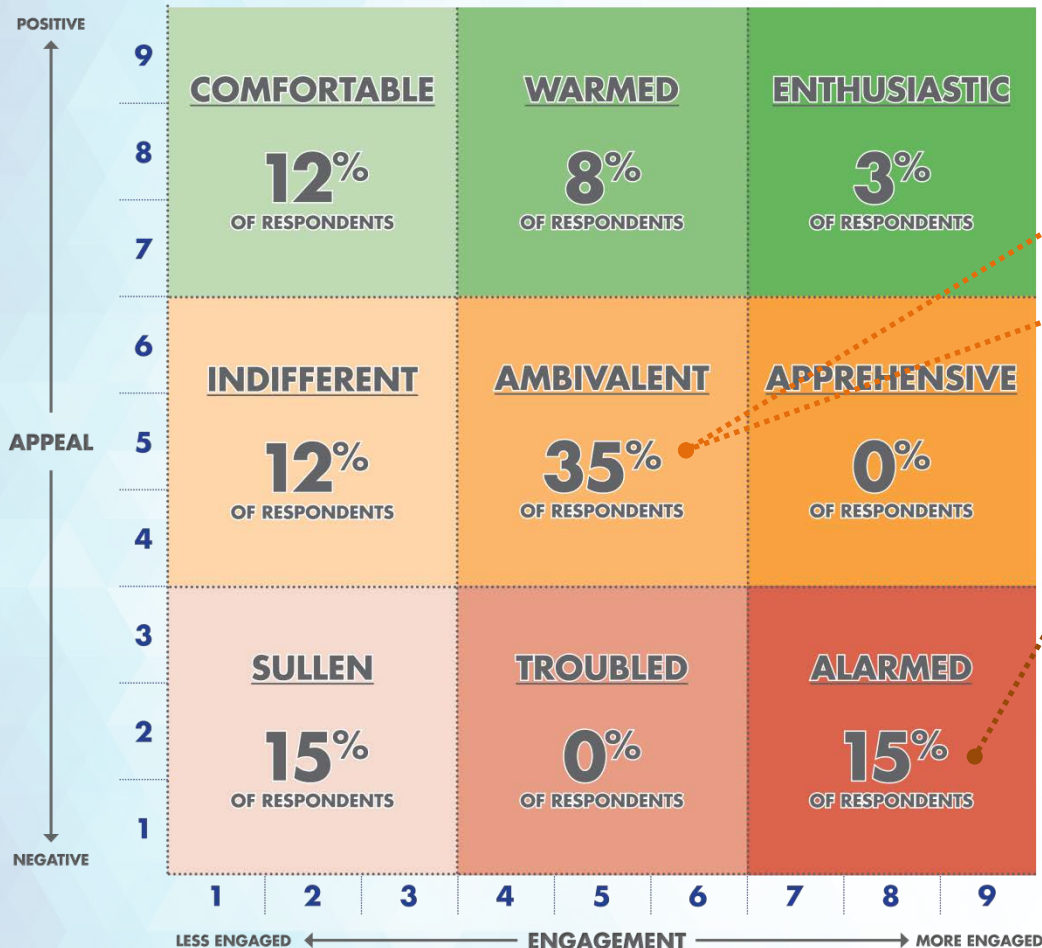
Nearly half of all consumers are **AMBIVALENT** or **INDIFFERENT**.

These consumers also feel **Uninterested*** and **Cynical*** about Viagra.

30% of consumers have negative feelings about Viagra.

These consumers also feel **Unexcited***, **Bored***, **Stressed***, **Afraid***





Emotional profile statements show that consumers are **Ambivalent*** and **Alarmed*** when it comes to the Viagra brand.

"Don't know much about it dont use " EP

"I dont know anything about this brand." EP

*"Again, not hip on pharmaceuticals - is sex really that important after the age of 70?
Ha!"* EP

THE BOTTOM LINE:

Viagra does not have the cache it once has. This is due, in part, because it is no longer promoted by Pfizer. Viagra must shift their marketing focus towards potential future customers, primarily those who feel **Stressed*** and **Afraid*** of the product.





Most consumers are not emotionally connected to the Pepsi brand for two reasons: health issues and Coca-Cola.

Surprisingly, there are NO consumers who are

ENTHUSIASTIC about the Pepsi brand

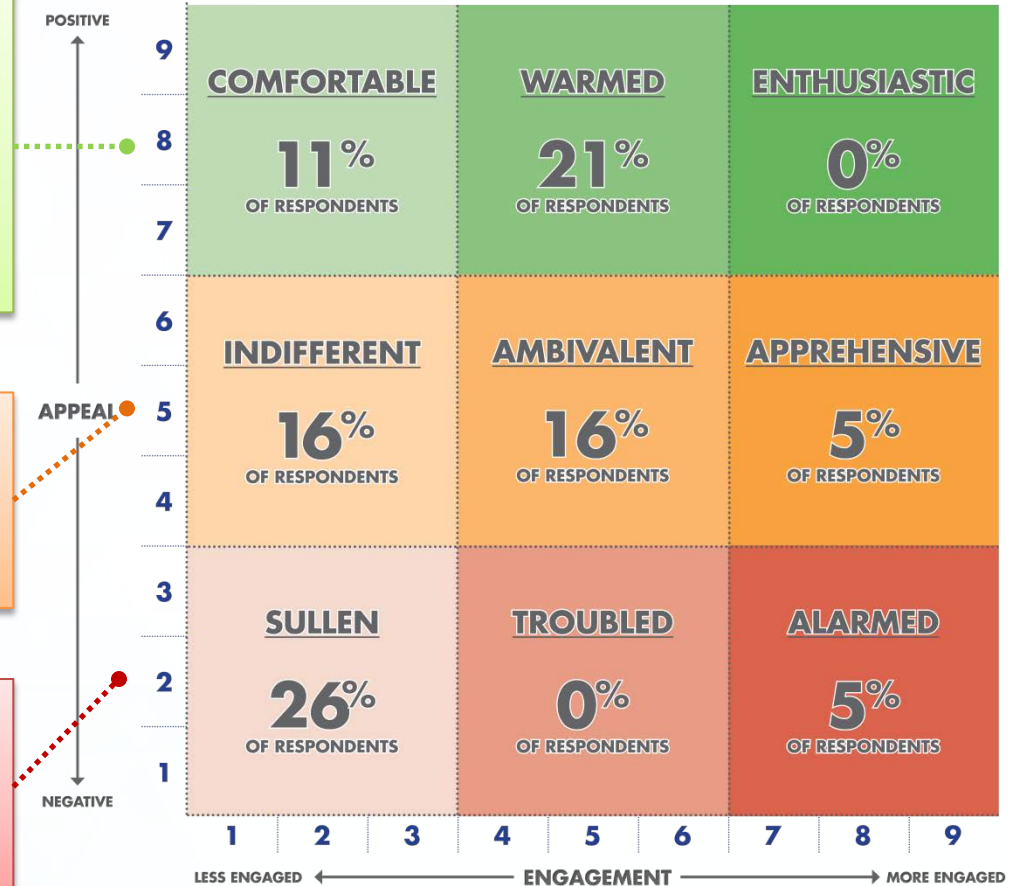
According to AdSAM's Emotional Profiles, those consumers with **WARM** feelings are apt to prefer Pepsi over Coca-Cola:

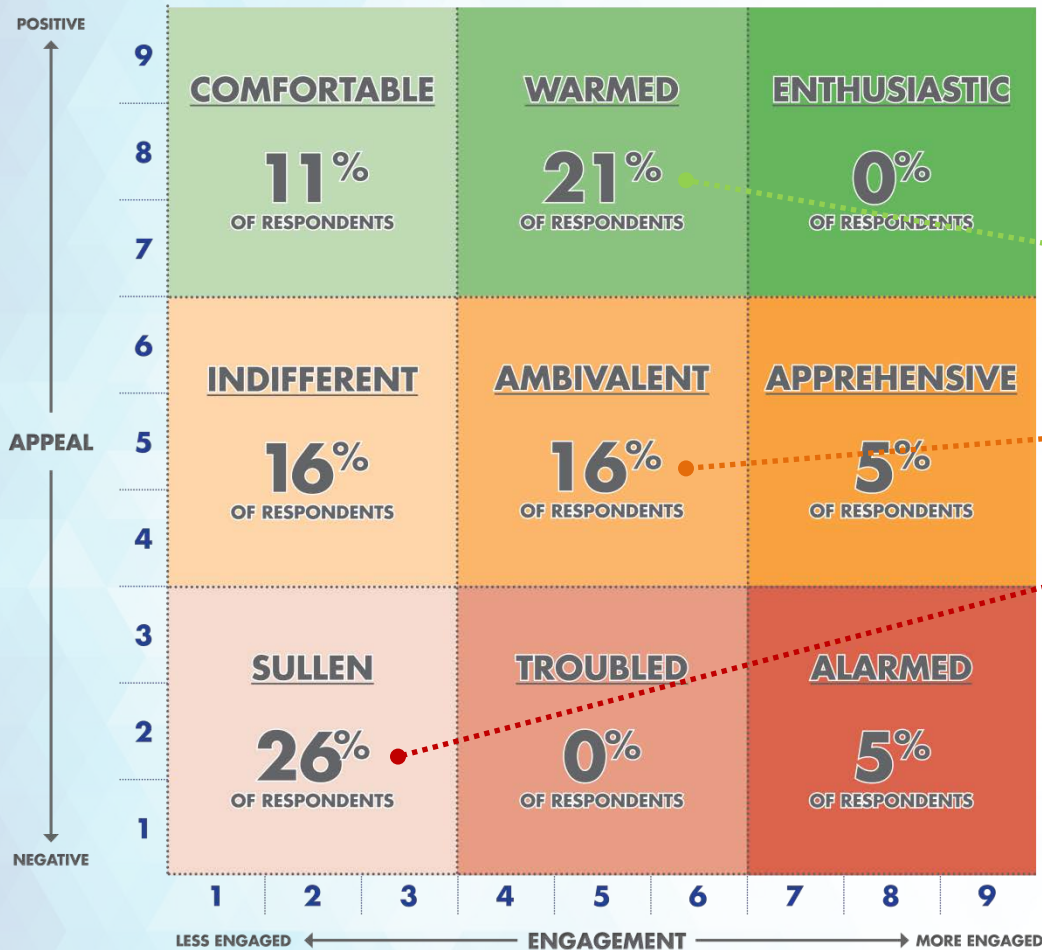
Approximately 1/3 of consumers, (32%) have mediocre feelings about Pepsi

These consumers also feel **Uninterested*** and **Cynical***

The third group of consumers (31%) have more negative feelings about Pepsi.

These consumers are **Unexcited*** and **Aggravated***.





Most consumers are not emotionally connected to the Pepsi brand for two reasons: health issues and Coca-Cola.

"I like the flavor better than Coke. just not a frequent soda drinker." EP

"I'm not a fan of Pepsi - or similar products. I generally don't drink them." EP

"I prefer Coke products." EP

THE BOTTOM LINE:

Pepsi has a dark future if their marketing efforts do not change. Consumers feel **Bored*** and **Uninterested*** in the Pepsi brand. The Pepsi brand must position itself as a good alternative to bottled water and energy drinks.





Pepsi's five year stock performance shows several peaks and valleys, with only moderate success vs. those of the top ten brands.



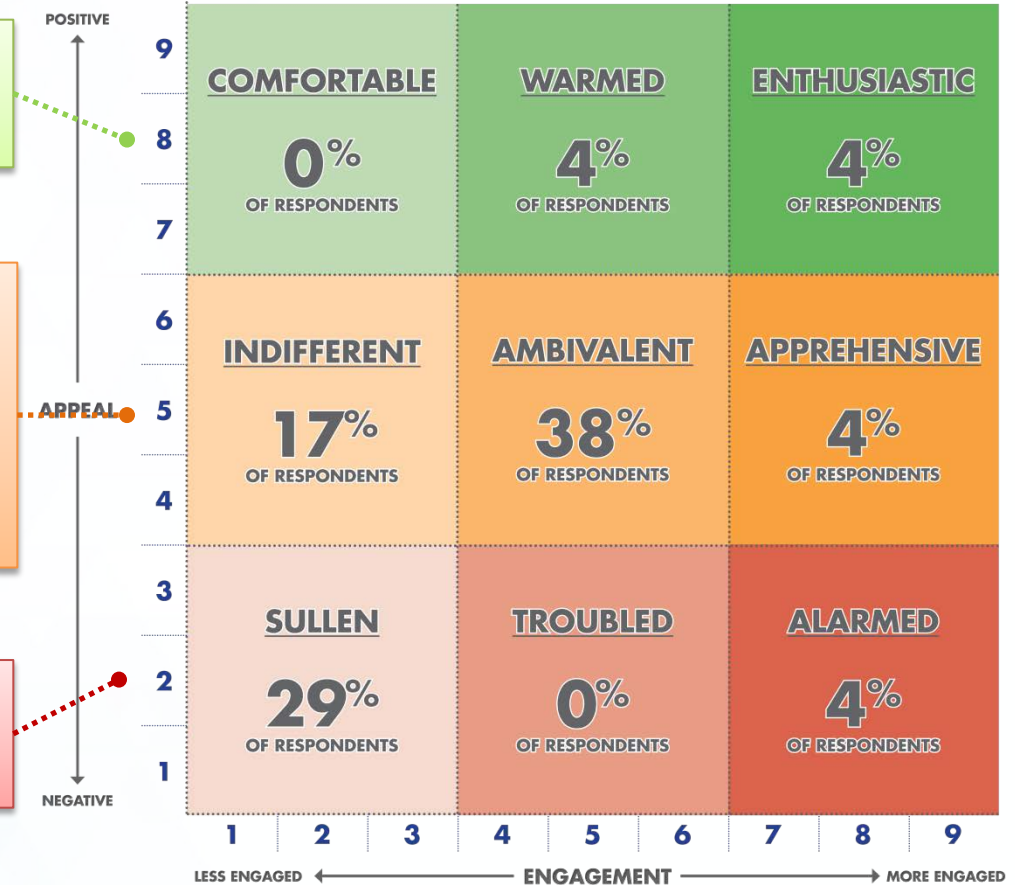
Feelings about the Nutrisystem brand range from moderate to negative.

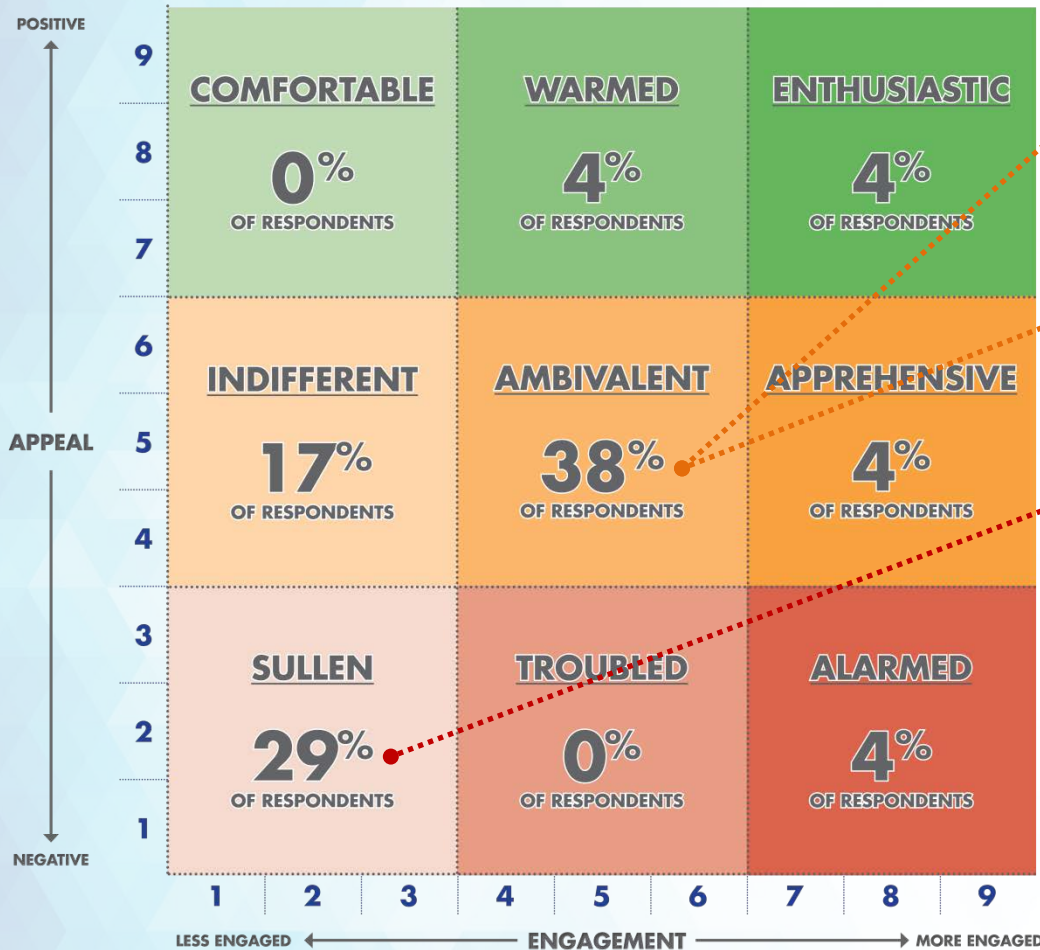
Very few consumers feel positively about the Nutrisystem brand...None feel comfortable.

Almost 2/3 of consumers (59%) have only moderate feelings about Nutrisystem.

These feelings include ***Haughty****, ***Cynical**** and ***Uninterested****.

Exactly 1/3 of consumers have negative feelings about Nutrisystem.





*"Know about it. Need to lose weight.
Never tried. Believe it might be
expensive." EP*

"Not sure I know the brand." EP

*"I have not known someone with great
success with their program." EP*

THE BOTTOM LINE:

Nutrisystems has clearly not hit an effective message. Consumers are ***Uninterested****, ***Cynical**** and ***Unexcited****. The Nutrisystem brand must identify those attributes which will make their message more compelling.

Because of consumer's doubts about Nutrisystems effectiveness and pricing, their five year stock performance is questionable.



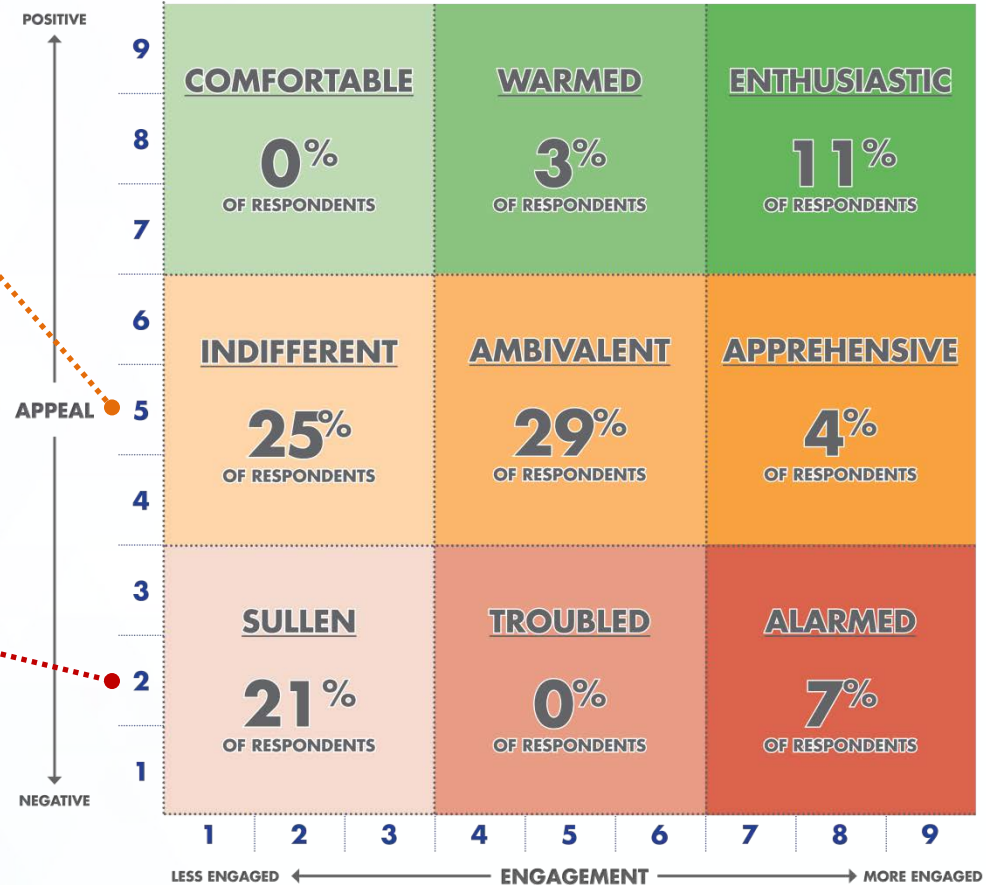
Consumer's feelings are almost evenly split between positive, negative and mediocre sentiments for Maxwell House.

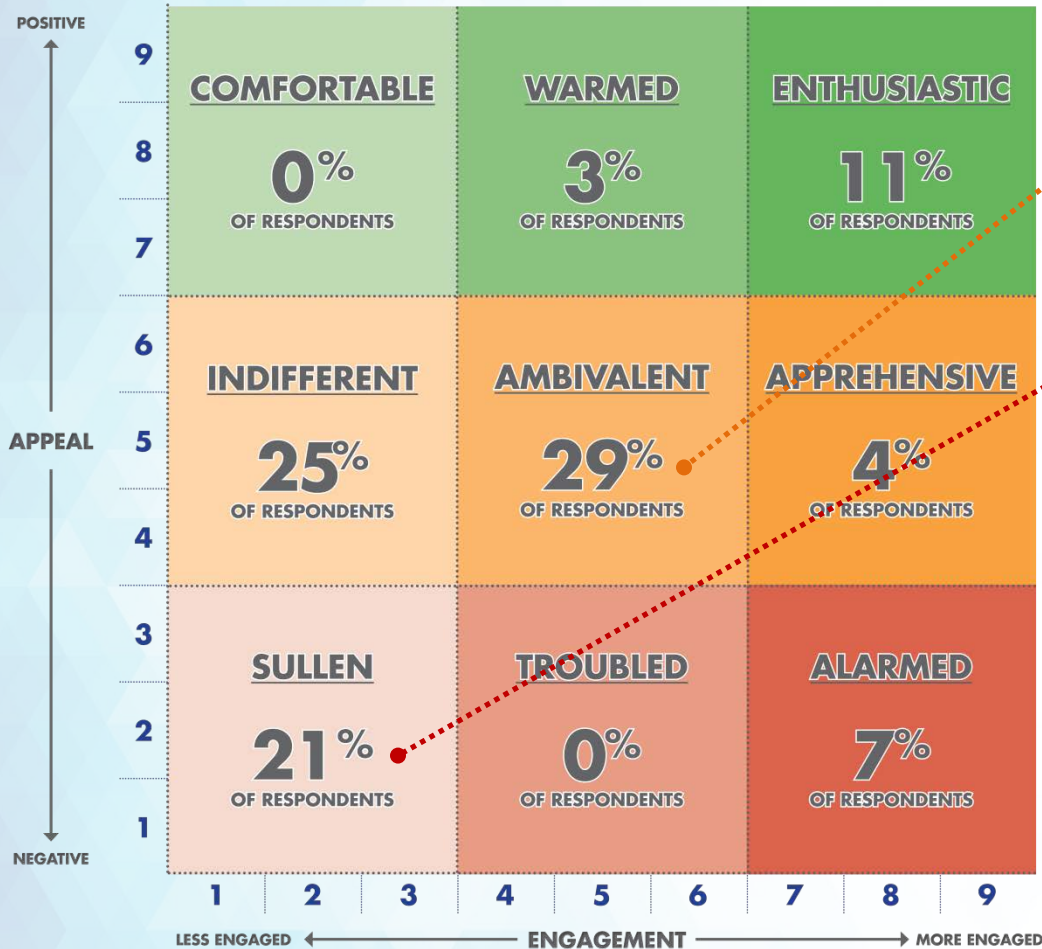
The majority of consumers (58%) are less than enamored with Maxwell House.

These consumers feel **Bored*** and **Haughty*** about Maxwell House.

Nearly 30% of consumers have negative feelings about Maxwell House.

Many of these consumers feel **Unexcited*** and **Sluggish*** about Maxwell House.





"As a coffee drinker. It's the middle of the road brand most places have. Nothing too special - just acceptable." EP

"Over priced average product." EP

THE BOTTOM LINE:

New competitors have positioned Maxwell House as a bottom tier brand, causing consumers to feel **Bored***, **Haughty*** & **Unexcited***. This brand must reposition itself into a more desirable place in the market.

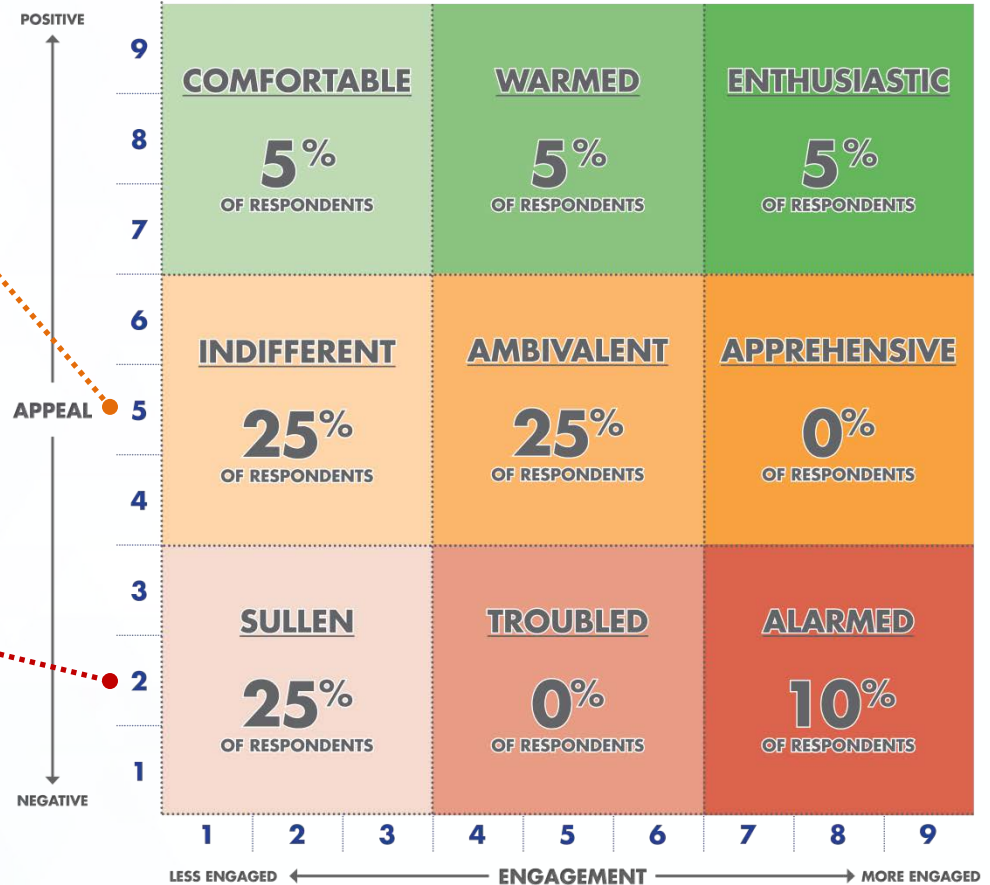
Consumers are not impressed with Folgers Coffee.

Fully 50% of consumers are either **AMBIVALENT** or **INDIFFERENT** about the Folgers brand.

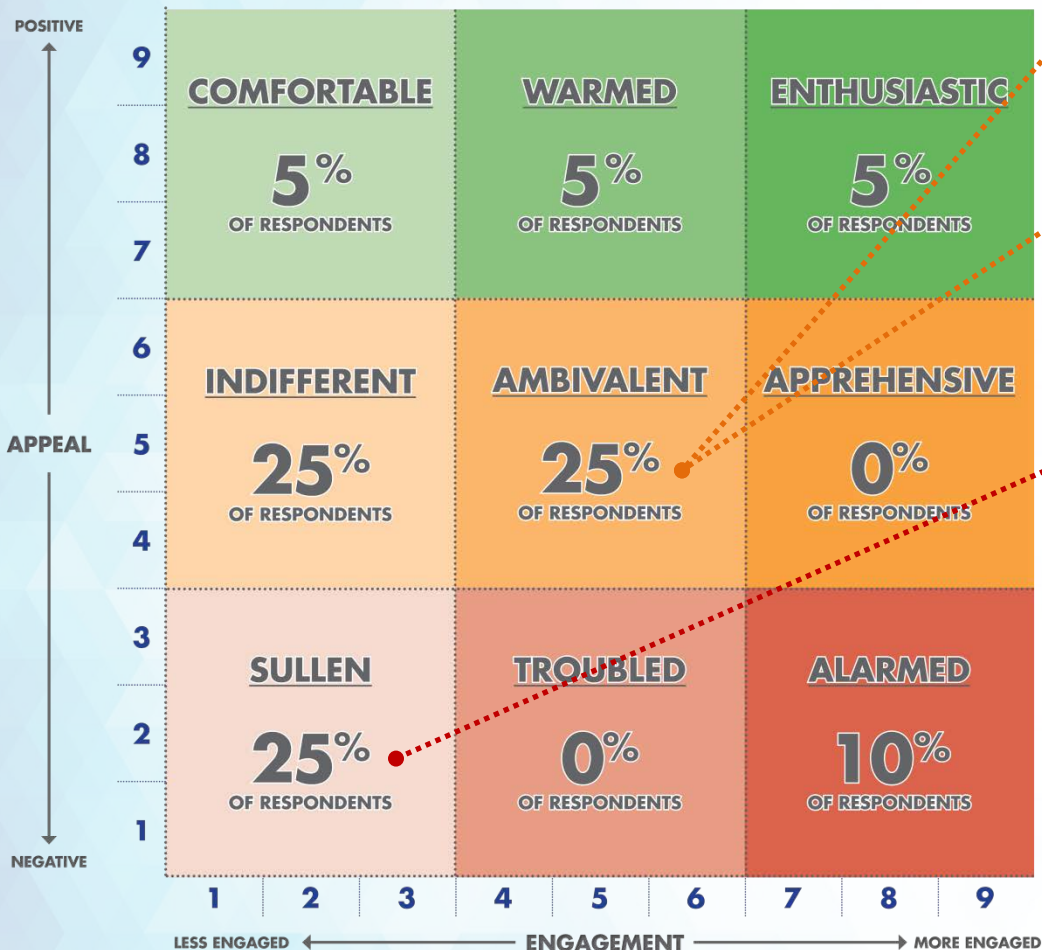
These consumers also feel **Cynical*** or **Bored***.

Those consumers with negative feelings question the quality and taste of Folgers.

Among these consumer, Folgers congers feelings of **Sluggishness*** and **Gloominess***.



Consumers are even more bitter about Folgers vs. Maxwell House



"Not bad but not my favorite." EP

"As with Maxwell House, not a coffee drinker but, enjoy the smell...used to have clever commercials... Don't recall seeing anything new lately." EP

"Bad coffee. Been around a long time but must be geared to price minded who will drink anything." EP

THE BOTTOM LINE:

The taste of Folgers is what negatively affects consumers' feelings. Consumers feel **Listless***, **Contemptuous*** and **Gloomy***. This brand must position itself to be a more convenient alternative vs. Starbucks, etc.



Consumers feel even less regard for Cialis vs. Viagra

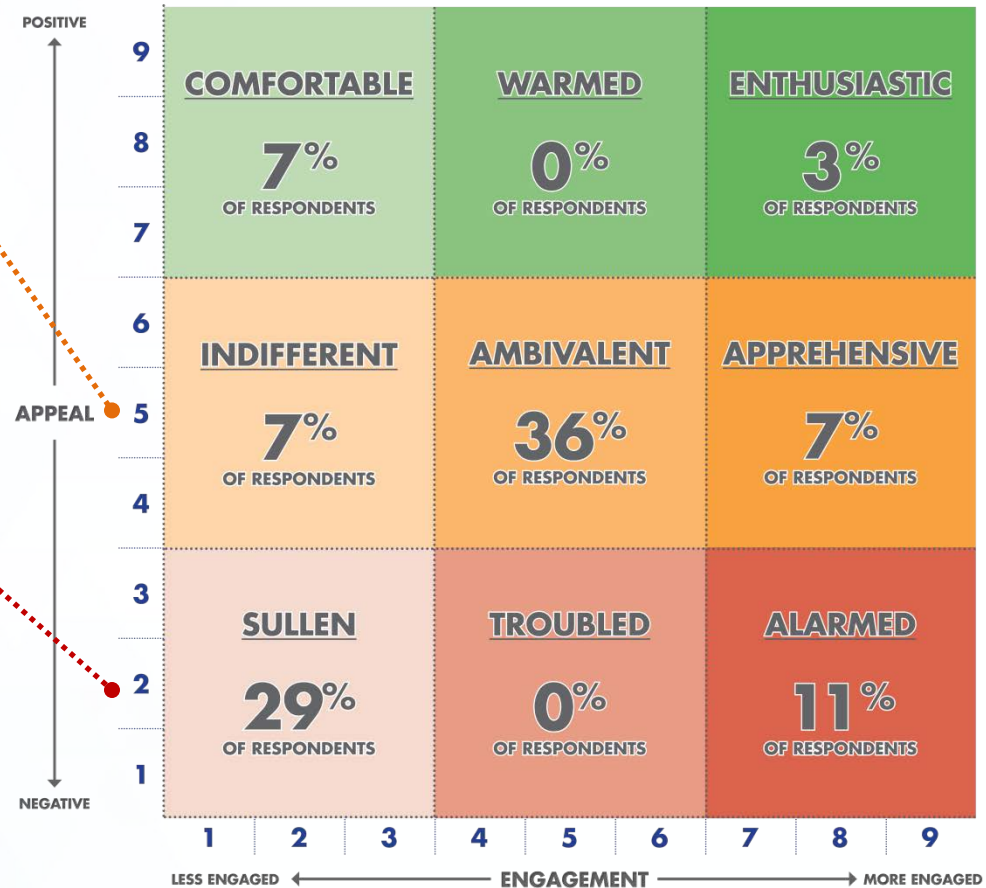


Consumers have trouble relating to Cialis. In general, consumers feel less than enamored to the Cialis message.

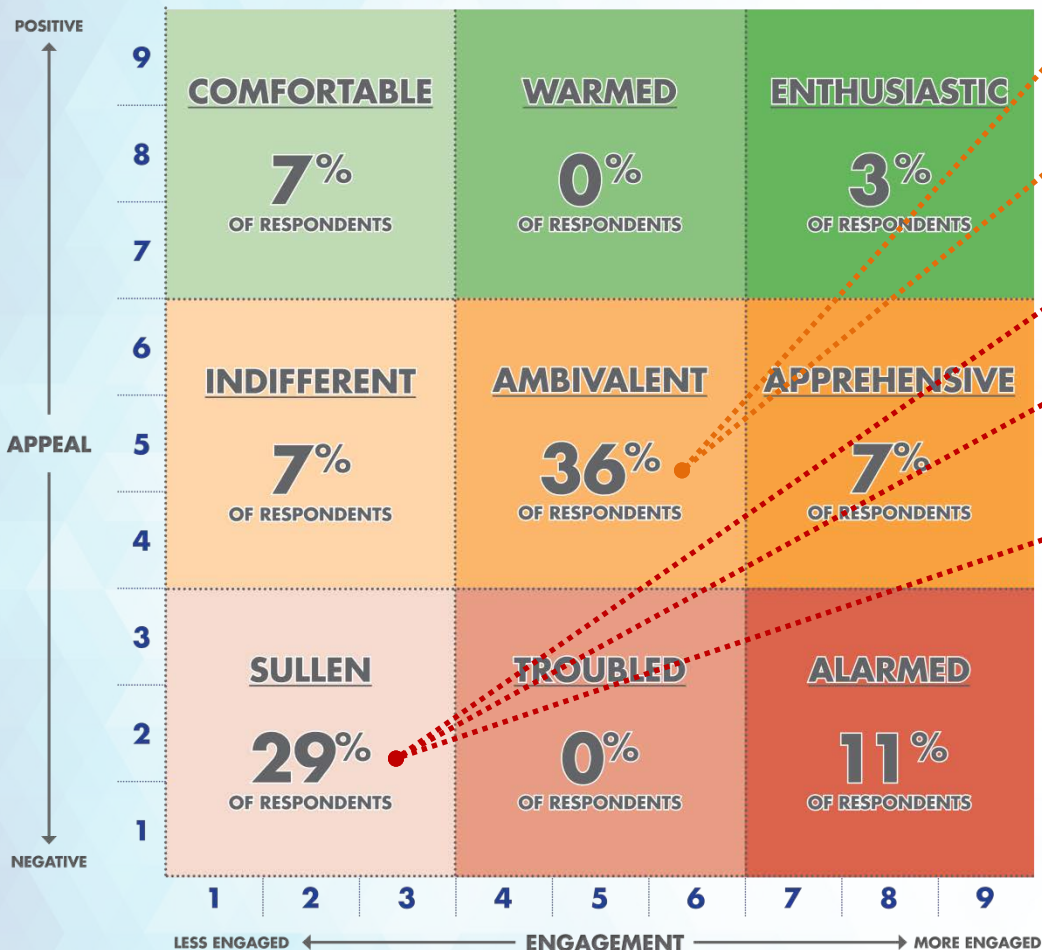
Similar to Viagra, 50% of consumers have moderate feelings about Viagra.

These consumers feel ***Contemptuous**** and ***Uninterested****.

The most significant different between consumer's feelings about Cialis vs. Viagra is the proportion of consumers who have negative feelings.



Consumers react negatively to the Cialis ad campaign



"No experience with this product." EP

"Don't need it. Don't use it. Doesn't apply to me." EP

"Hate their stupid commercials." EP

"Hope my mate doesn't ever need this." EP

"I don't have any experience with this drug. So its not personally important to me as it might be to others." EP

THE BOTTOM LINE:

One thing the Cialis brand can change is the image of the couple in two separate bathtubs. This causes consumers to feel **Gloomy***, **Listless*** & **Haughty***.



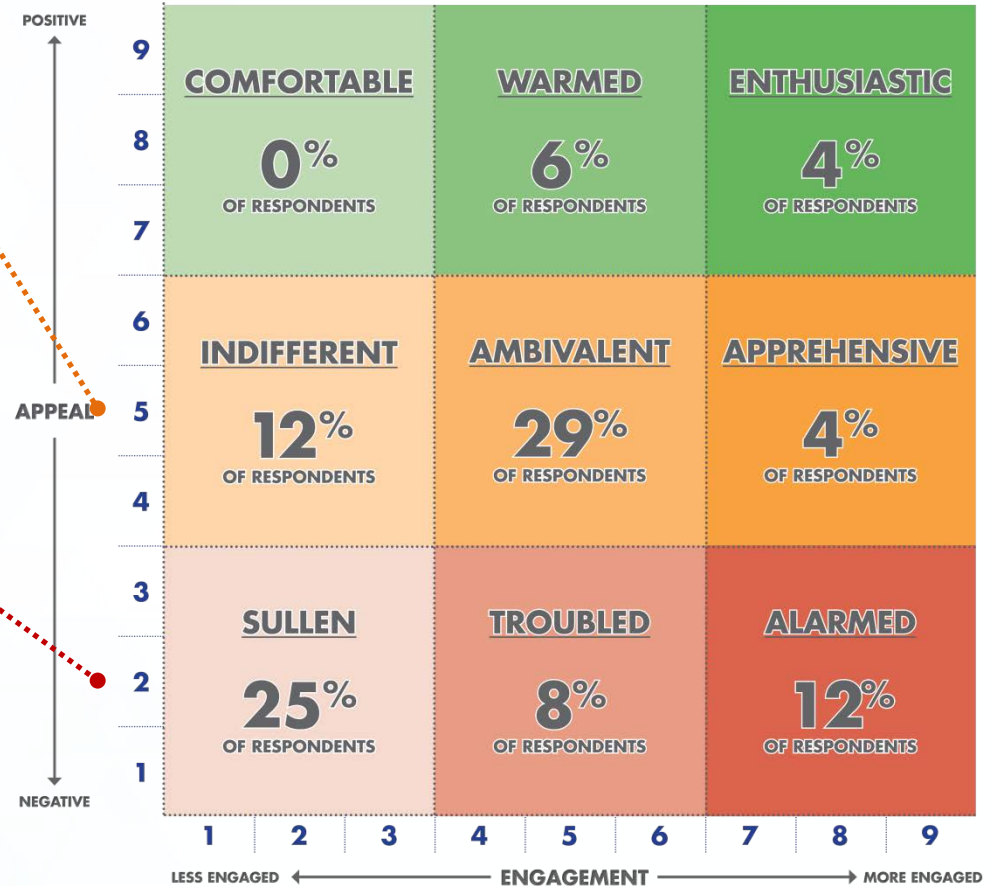
Consumers have trouble relating to Lipitor. In general, consumers feel less than enamored to the Lipitor message.

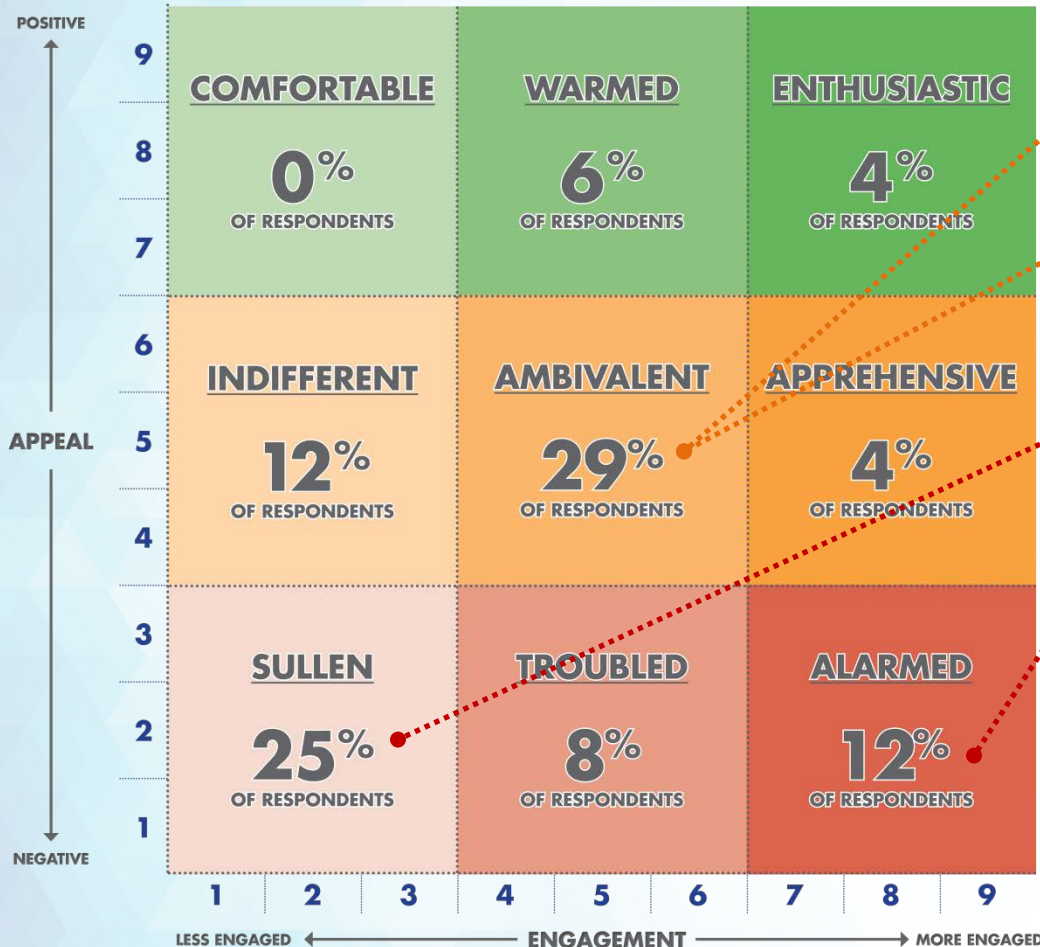
Almost half (45%) of consumers have neither positive nor negative feelings regarding the Lipitor brand.

In addition, these consumers feel ***Cynical**** and ***Subdued****.

Unlike any other product in the bottom ten, fully 45% of consumers have negative feelings about Lipitor (as opposed to just 10% with positive feelings.)

These consumers are also ***Bored****, ***Distrustful**** and ***Terrified****.





"I don't know anything about this product." EP

"Don't use it and have seen people have negative side effects." EP

"Hearsay." EP

"Over hyped and overpriced drug that causes muscle pain when I used it." EP

THE BOTTOM LINE:

The golden age of Lipitor (and other statins) has come and gone. Patent expiration means that little will be done to improve its positioning and message. Therefore, consumers will continue to feel **Uninterested***, **Bored*** and **Contemptuous***.

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2. Through our surveys, we found that consumer's poor feelings regarding many of the bottom ten brands are due to three factors:

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3. Among the bottom ten brands, the average five year stock performance is an increase of just 33.25%

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ANDROID



Nutrisystem

VIAGRA
(sildenafil)

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Rock Solid - Heart Touching



Maxwell
House



AdSAM Methodology



AdSAM®
EMOTIONAL RESPONSE MODELING

AdSAM® leverages its time-tested and extensively researched and published predictive metrics to provide clients with guidance on maximizing product marketing.



- **Intuitive and validated measure of emotional response that predicts changes in purchase intent**
- **Widely published in numerous peer-reviewed journals**
- **Hundreds of analyses conducted over 20+ years**

AdSAM® Perceptual Maps

- Used to plot means or individual respondent (in qualitative research) responses in the emotional space
- Match feelings with measured AdSAM® responses.

AdSAM® Emotion Groups™

- Segments the emotional space into nine distinct areas from *Enthusiastic to Alarmed*
- Shows the distribution of emotional responses
- Expressed emotions are "**Bolded**," "*Italicized*" and designated with the AdSAM icon ()

Emotion Profiles®

- Segments verbatim responses by Emotion Group™
- Provides insight as to "whys" or triggers behind emotional responses
- They are represented by "**EP**" at the end and labeled with the Emotion Group from which the quote was gathered

Emotion Temperature

- The AdSAM® Emotional Temperature™ is a comparative index of the emotional strength of concepts, products, brands or other stimuli.

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