KILLING BRANDS….SOFTLY

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Abstract

Based on ten years of U.S. consumer responses to a commercial online questionnaire, (over 1 million individual responses) challenges are raised about how Manufacturer Product Brands can be built and supported in an interactive marketplace. It was found that increases in consumer social media activity appear to contribute to the decline in consumer brand preference and the rise of No Brand Preference. Evidence of these findings is presented and recommendations are made for new forms of Manufacturer Product Brand support. A brand research agenda for the interactive marketplace is also provided.

Keywords: Brands, Brand Preference, Brand Relationships, Marketing Communication

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I. Introduction

Over the years, brands and branding have been the key foci of much marketing and communication research and discussion[1]. Marketers have always viewed brands as an effective and efficient method of differentiating their products in a competitive marketplace[2]. As media interactivity has increased, however, marketers had hoped to use the new social media tools to expand and enhance their branding efforts[3]. Academics and practitioners seemingly believed "social media" would be a key brand communication form going forward[4]. Thus, it would seem that one of the brand manager's key tasks would be to understand and implement social and other interactive media programs to build and support their brands.

There is, however, increasing evidence that brands and branding may have reached their zenith in consumer value. Indeed consumer brand value may actually be starting to decline in terms of delivering differentiated impact[5]. In this paper, we posit that social media may be a key culprit in driving brand value down, rather than building it up. If this is true, the whole concept of social media, brands and branding may need to be reconsidered.

I. Premises and Format

If social media is indeed a brand destroyer, evidence is needed. Thus, this paper is based on the following structure:

- First, evidence is presented that consumer brand preference is generally declining, rather than increasing.
- Using a very large, longitudinal consumer-reported, on-line data set, (1,101,375 total responses) evidence of brand preference declines in the U.S. is presented based on 16 broad food store departments which includes 73 specific product categories and 1,526 specific brands
- This decline in brand preference appears to be directly correlated the consumer's increased use of social media.
- From these findings, recommendations for actions brand managers might take to reverse or at least stem these declining brand market share trends are offered.
- Finally, a set of recommendations for future brand research are presented.

II. Is Brand Preference Actually Declining?

In a recent study, Schultz and Block[6] provided evidence of the rise of consumer "No Brand Preference" in several product/brand categories. When consumers were asked what brand they preferred a growing response was "No Brand Preference". They also claimed to have found a negative correlation between consumer's use of social media (primarily

Facebook) and those same consumers lack of preferences for manufacturer's brands in several consumer product categories. Further, Schultz and Block reported that the more consumers reported using social media (Facebook), the more they said they had "No Brand Preference". (It should be noted the choice of "No Preference" in the brand and retailer product category questionnaire, as analyzed by Schultz and Block, was a conscious consumer decision and required the respondent to mark that on the questionnaire).

This study expands and extends the Schultz and Block findings over a longer period of time, with more brands, in substantially more product categories and among many more respondents.

III. The Ten Year History of Consumer Behaviors, Mass Media Usage and Brand Influence

Prosper Business Development (www.goProsper.com), Worthington, Ohio, provides business development services and market intelligence to a wide variety of U.S. based marketers. They have conducted monthly, quarterly and semi-annual on-line consumer studies both in the U.S., since 2001, and, in China, since 2006. The results of these studies have been made available to various academic institutions through research grants. They have been widely used in various types of both professional and academic research.[7,8,9,10,11]

This study makes use of the BIGinsight™ (www.biginsight.com) CIA Monthly Consumer Studies, an on-line consumer questionnaire completed by approximately 8,000 U.S. residents each month The data used in this study comes from the aggregated results of 130 months of questionnaires, (January, 2002 through October, 2012.) A total of 1,101,375 responses were analyzed, with an average of 8,472 respondents per questionnaire wave. Each wave of questionnaires was balanced against U.S. Census methods to provide a nationally projectable sample each time the questionnaires were employed.

These questionnaires cover 16 broad consumer product departments found in retail food stores. They include such aisles and categories as household cleaning products, snack foods, frozen foods, breakfast cereal and the like. These food store departments comprised a total of 131 product ranges in 73 specific product categories, and represent 1,526 individual brands. This level of data gathered enabled us to drill down into specific brand data on products and categories as required.

The data captured by the CIA questionnaire is quite extensive. In addition to store and brand reported purchase data, respondent media consumption data was also acquired, i.e., average amount of time spent each day with the various media forms available to them. Respondents also identified the media form(s) that most influence their purchase decisions in nine broad consumer product categories. Thus, it was possible to relate reported brand usage and influence created by media forms to develop an almost causal relationship.

In addition to the product and media data, respondents also identified whether they recommended products they saw, heard about, used or otherwise engaged with among friends, relatives, associates and others, either through face-to-face and/or social media. Knowing product usage, and whether or not those experiences were shared with others, enabled the creation of a Net Promoter-type Score (NPS) (www.netpromoter.com) for each brand and for each retailer reported by each respondent. That data was then aggregated up into product line, categories and the like.

In developing the NPS number, the format developed by Reichheld[12] and employed by Satmetrix[13] for commercial purposes, was used. (The general calculation is based on a 10 point scale where brand users record their level of satisfaction with the brand or store. Consumer rating scores of 10 and 9 are combined for all respondents to create a total "promoter" score. Those giving recommendation scores of 1 to 6 are totaled as "detractor" scores. Those are then deducted from the "promoter" total which provides the "One number you need to know" NPS score as advocated by Reichheld[14]. This NPS methodology is currently used by thousands of organizations around the world to determine the level of customer satisfaction with the firm and its brands and to forecast the future growth trends of the brand and organization.[15] Although there has been some criticism of the NPS approach[16] it is sufficiently robust to provide the information for our analysis.

The NPS score for each of the individual brands in the 73 product categories was calculated. In addition, an NPS rating was also calculated for each retailer where the brands were purchased. Thus, a comparison of NPS for the manufacturer brand and the retail store was developed. From this, it was possible to determine whether the manufacturer brand or the retail store was stronger with reporting consumers.

IV. Findings

Our first finding was that Brands generally had lower Net Promoter Scores than the Retailers where they were purchased. An example of the aggregated findings is illustrated in Exhibit 1.

Exhibit 1 Goes About Here
Market Performance of Stores and Products

The exhibit provides an aggregated comparison of the reported shares of each individual brand in the product category for both the Retail store and the Manufacturer's Product Brand. That was done by taking the NPS for the leading brand in each of the 73 product categories and the leading retailer in those same categories, aggregating them and averaging them to provide this output. (The Share Leading Store line should be read as "the share of market of the Retailer in that Brand category" and the Product line should be read as "the share of market for the leading Brand in that category". As shown, the Share of the Leading Store is substantially higher than that of the Product Brand in this aggregated total. More evidence of that difference is shown by the AGR (Average Growth Rate) for the Retail Stores, all of which are positive (+0.54), while the AGR for Brand Products is decreasing by -1.68% on average over the ten years.

What is more disturbing for Brands, however, is the growth of the consumer "No Brand Preference" choice. Recall, in the CIA questionnaire, this is a consumer reported choice. While the Share of No Brand Preference is growing for both Stores and Brands, they are not equal. The respondents reporting this choice was made by about 25% of the Retail Store respondents, but, was chosen by over one-half of the respondents for the Product Brand group. That simply means: over 50% of all consumer responses over the 10 year period were for "No Brand Preference" in the Product Brand category. Most disturbing, for both Stores and Brands alike, is that the AGR for both, when stated as "No Brand Preference", continued to increase over the entire ten year survey period.

A final point is relevant. The Average Net Promoter Score for Stores was a +19.48, while the aggregated Product Brands NPS score was a negative -9.07. This means the recommendations consumers gave to their Product Brands, in terms of "Detractor" values, was greater than that of "Promoter" for all the brands in all the categories, when averaged together for the ten year period. Thus, the growth of "No Brand Preference" seems to be broad scale and pervasive among all these food store stocked Brands.

In a majority of the 1,500+ Product Brands studied, and the hundreds of retail Store Brands, the preference for the individual Product Brand was consistently lower than it was for the Store brand. That's clear from the aggregated data in Exhibit 1. Consumers in these ongoing studies, place more faith in the Store brand and are more willing to recommend it to others than they are for the Product Brands stocked in those stores. This issue of Store loyalty vs. Product Brand loyalty has been a recurring theme in both academic and practitioner research over the years.[17,18] This finding adds substantial clarity to this unresolved question in the literature. That is seen most clearly in Exhibits 2 and 3 which show that the Store preference is much greater than Brand preference.

Exhibits 2 Goes About Here
Top Leading Brand Categories

In Exhibits 2 and 3, all category and brand data in the analysis has been aggregated into quintiles. In Exhibit 2, the Product Brand category quintile showing the highest share of market (share of market was calculated by summing all consumer Brand mentions in each category and then ranking those numbers) for the 73 product categories is shown. In this case, Clorox is the leading brand in the Bleach category with a "market share" of 42.01%. (Note: this market share is based on consumer responses to the CIA questionnaires, not on actual market sales) Yet, the Clorox share of customer preference declined by -3.36% over the ten year study period. The Store Brand, where the Clorox product was purchased, had a much lower share of market, on average 8.61%, but, the share of consumer Retail Store preference increased by 4.95% during the decade. At the same time, the No Brand Preference rating was almost the same as that of the Clorox Brand, i.e., as many respondents said they had No Brand Preference in the Bleach category as said they preferred Clorox. More importantly, the market share of No Brand Preference was growing during the period, while Clorox was declining.

Exhibit 3 shows the reverse side of the Product Brand Loyalty coin, i.e., those brands in the quintile with the lowest share of market by individual Product Brand by category.

Exhibit 3 Goes About Here
Lowest Leading Brand Categories

All Product Brands in Exhibit 3 have category brand shares of less than 7%. Low share may occur for several reasons. It may be because there are multiple brands competing in the category and no single brand stands out. Alternatively, it may be that these category Brands are more specialized, i.e., patent medicines, hair coloring and rinses, and baby products. Thus, they may appeal to a more limited number of customers and are infrequently purchased. Whatever the reason, in spite of the substantial amounts of money invested by brand owners, little brand preference has been developed. Some of the Brands in this quintile are well known and easily recognized, such as Gerber, Stouffers, Oil of Olay and Clairol and the like, yet, they have not created sufficient support to overcome the consumer vote of "No Brand Preference" for that category. For almost all No Brand Preference ratings, the scores are in the 70% to 80% range and, the AGR of No Brand Preference is continuing to grow.

Interestingly, a much lower Store Brand market share was found in these categories compared to those in Exhibit 2. Store Brand categories in this quintile fall in the single digits and have been declining over the survey period. One reason for these low Store Brand scores may be that the food store is not the primary retailer choice for these Product Brands, i.e., consumers may be buying these brands from drug retailers or mass merchandisers, not food stores. If these findings are broadly extrapolated, re-thinking the methods and approaches traditionally used to define and measure brand value may be needed.

V. Why Is Product Brand Preference Declining and Why Now?

There is substantial support for our findings that Product Brand preference is declining from other researchers[19]. The major question seems to be: are only a few, individual brands and their value declining, or is that a more widespread issue across all food store brands. Exhibits 2 and 3 clearly show Product Brand Preference has declined in some categories, but, aggregated, multi-brand data is probably more relevant. Therefore, we aggregated all the brands in the 73 individual product categories identified in the CIA Monthly Study data, i.e., a total of 1,526 brands. Additionally, all NPS findings for individual retailer brands were aggregated as well. The two files were then merged to provide the aggregated result in Exhibit 4.

Exhibit 4 Goes about Here
Leading Share Quintiles Categories

Five product quintile groups were created, using the leading Product Brand share of market for the top brand in each of the 73 product categories. The Product Brand Share of was then used to create an array of Product Brands with the highest product brand share in the top quintile (#5) and the others in descending order.

The quintiles were then arrayed based on the descending mean score of the brands within each of the categories. The top quintile, #5, had an average mean Product Brand share of 31.22% while the lowest Product Brand quintile, #1, had a mean Product Brand share of 5.25%. The AGR (Average Growth Rate) for all the brands in the Product Brand quintile was then calculated. In each case, over the ten year period, as shown, all declined. The same was done for the Retail Store Brand during the same period. While the mean Retail Store Brand on average was much lower, in the top two quintiles, the Retail Store Brand did indeed grow over the decade. Most interesting, however, is the No Brand Preference finding. In all five quintiles, No Brand Preference was above 40% in overall share of market. No Brand Preference registered 68% in decile #1 and was higher in market share than any Product Brand share of market. In all five quintiles, No Brand Preference AGR increased over the ten year measurement period.

From this analysis, Product Brands seem to be in trouble. Their market share is declining. Retail Store Brand preference is growing. Most importantly, however, the overall surge in No Brand Preference seems to be creating major problems for Product Brands. The question is: what’s causing the decline in Product Brand value? If that can be determined, then initiatives might be implemented develop solutions.

A number of alternatives were investigated. The most promising found was the major shift in media usage by consumers. Historically, brand managers have relied on Manufacturer's Product Brand advertising delivered through traditional mass media.[20, 21] Indeed, most brand value measures have been based on studies of consumers who had broad exposure to brand marketing expenditures in mass media over time.[22,23] Thus, there appears to be some evidence that the entire concept of major national brands has been driven by brand marketer's investments in mass media, particularly television.[24,25]

A common brand philosophy has developed that posits that brands are created, supported and reinforced through mass media advertising expenditures.[26,27] Thus, changes in consumer use of mass media might well be one of the reasons for the decline in Product Brand share and preference. Therefore, we next investigated whether or not there were correlations between consumer changes in mass media usage and brand preference.

VI. Changes in Usage of Various Forms of Media Over the Past Decade

In the CIA questionnaire, respondents are asked to provide information on which or what media forms they use during an average day, along with questions on how much time they spend with each of those media forms. A list of 31 media alternatives (both online and offline) is provided in the questionnaire. Recently, much speculation has developed about the impact of the growth of the internet and other forms of computer-driven media on consumer brand choices.[28] The ten year view, provided by the CIA data, clearly shows the shift. Exhibit 5 shows the Average Use in Minutes for Television and the Internet as reported by the CIA respondents over a seven year period (December, 2005 through June, 2012). A 2005 start was used for this analysis since social media forms first began to appear in the CIA questionnaire data.

Exhibit 5 Goes About Here
TV and Internet Usage in Average Minutes per Day

While the usage rates for TV and the Internet have gone up and down during the seven year period, as illustrated in the chart, the trend lines (dotted lines) tell the story. Time on the internet is increasing. Time with television is declining. While the amount of time spent is within a fairly narrow range, i.e., 15 or so minutes per day, the shift in terms of media usage is seismic. When the usage lines crossed in approximately 2008-2009, it became obvious that on-line; digital media was the consumer's media form of choice.

Those charted lines are explained and clarified in Exhibit 6. That shows the daily average minutes per day as reported by questionnaire respondents. Those have been averaged over the seven year period.

Exhibit 6 Goes About Here
Average Daily Media Consumption

The delivery system data on media has been divided into (a) mass media, (b) digital media and (c) communication media. The Minutes/Day column represents the average consumer reported media consumption per day for the entire period. The AGR (Average Growth Rate) is the average growth or decline of consumer usage in Minutes/Day over the seven year period.

TV, Radio (Terrestrial), Magazines and Newspapers all declined in usage while Web Radio, Satellite Radio and Direct Mail usage all increased. This seems to indicate a move by consumers away from the traditional media, that is, the media forms which built brands. Replacing that, there are increases in Internet use and time spent with Blogs along with email and IM (instant messaging). While some of these changes have been well documented in other media studies over the years, (need citation here) the implications of those changes have not been as well understood by marketers or even media executives. For example, average time spent with Email over the ten year period exceeded that of time spent with Television. When time spent with Email and the Internet (in general) are combined, they are almost as great as the time spent with the four traditional advertising-dominated mass media forms…..259.2 minutes with Email and Internet compared to 271.6 minutes for mass media (Television, Radio, Magazines and Newspapers).

Time spent with a media forms has been the traditional method of evaluating the importance and value of that media for advertising purposes. A more important measure is found in the CIA data that of the influence of the media form on consumers purchasing decisions.

Exhibit 7 Goes About Here
Average Traditional Media Influence

Data in Exhibit 7 comes from individual consumer responses to the 1,101,375 CIA questionnaires returned during the 10 year period analyzed for this paper. Some additional media forms have been included in this chart since they commonly exert more purchasing influence than some of the more traditional media forms. Two of those measures are Word-of-Mouth (one person telling or recommending a product or service to another person) or Read-an-Article, the surrogate for public relations activities. The other categories were aggregated into Retail Media, that is, media forms which commonly appear in the retail store or provide some incentive for consumers to visit a particular retail location. The final category is that of Mass Media. That is very similar to the one in Exhibit 6, i.e., TV, Newspapers, Magazines, Radio and the like. The difference is that these figures are the percent of influence the consumer reported these media forms to have on their purchases in the various product categories, not just usage.

In Exhibit 7, Word-of-Mouth (WOM) is the most powerful and influential media form among consumers, followed by Coupons and In-Store Promotions. Television is the fourth most influential media form. Most interesting is that most of the top influential media forms have some sort of promotional bent such as Inserts (promotional flyers included in newspapers), Direct Mail (coupons or other offers delivered directly to consumers), along with Newspapers, which are generally feature promotions or discounts when placed by retail firms in local editions. Few of the promotional activities captured in the CIA data had much to do with building brands. That may well explain why Product Brand preference is declining almost across the board. Supporting that is the finding that most traditional brand building activities employed in support of brands, i.e., Public Relations (read an article), TV, Newspapers, Magazines and the like all declined in AGR during the measurement period.

Based on the previous results, additional analysis was done on the two major types of Digital Media, i.e., Computer Media and Conversational Media. Those results are shown in Exhibit 8.

Exhibit 8 Goes About Here

Average Digital Media Influence

In the exhibit, results of the consumer reported influence on their purchase decisions for the nine (9) forms of "new media" are shown. Computer Media includes those forms which rely on some type of computer based support for delivery, i.e., the Internet, Blogs, Video (downloads) Video Games and Web Radio. All those media forms had a positive AGR during the survey period. While the base for most of these media forms was small, the percentage increases were substantial, ranging from +20% for Video Games to +18% for Blogs.

The Conversational Media (defined as generally being interactive) included Email, Social Media, Mobile Media, Texting and IM (Instant Messaging). Although these media had approximately the same Influence percentage as the Computer Media, they showed even greater AGRs during the analysis periods. For example, Mobile Media influence grew by +26.1% and Texting increased by +22.8%. Most striking is that those media were growing positively during the entire 10 year CIA measurement period while many of the other traditional media showed declines.

VII. Conclusions and Next Steps

From all this material and all these analyses, some conclusions appear evident.

A. Decline of Product Brand Preference and Growth of No Brand Preference

In most of the categories investigated, almost all Manufacturer Product Brands were declining in preference over the measurement period. At the same time, Retail Store Brand preference was either flat or growing slowly. Thus, it seems consumers are shifting their loyalty to the retail store and away from manufacturer branded products. This seems to be true for almost all the Manufacturer Product Brands across all the 73 product categories. More disturbing, however, is the rapid and continual growth of the No Brand Preference category by consumers as reflected in the Net Promoter Scores. Thus, as Brand Preference is declining, it is seemingly being replaced to a small extent by a shift to Store Brand preference. What is or should be of more concern is the shift from Product Brand preference to a stated consumer choice of No Brand Preference in most of the brand categories. Based on this data, brands would seem to be in decline across the board and the current efforts by brand marketers does not seem to be having much, if any, influence on this decline, at least over the last ten years as reported in the CIA data.

B. Decreases in Brand Media Support Time and Influence Among Favored Brand Media

Historically, Manufacturers Product Brands and their brand managers have developed and supported their brands with substantial investments in traditional mass media forms. Initially those investments were in print media, primarily Newspapers and Magazines. Gradually, beginning in the middle 1980s, Television became the mainstay of how brands were built and maintained. Over the past couple of decades, consumer use of (that is, time spent with the media form) has gradually shifted from traditional mass media, primarily Television, to various forms of digital and computer distributed media. Not only are the minutes of time being spent by consumers declining in mass media, they are being replaced by other types of media usage, chiefly internet and computer distributed media forms.

But, it is not just the amount of time being shifted that should be of concern to brand managers. The influence of the various media forms on brand preference seems to be changing as well. No longer is Television the dominant media influence among consumers, that is being replaced by various Computer and Conversational media. While many brand managers have recognized this change in consumer behaviors, they have yet to find an adequate solution to the traditional power and influence of the mass media-based, culture-creating impact of broad-scale television branding activities. In short, brands seem to have been a cultural icon of a mass market. There is some question whether the individual and interactive media forms which are replacing them have or will have the same brand-building power as the brands and their managers have increasingly relied on.

C. Some Relationships Which Seem Self-Evident

Although this is the first paper developed from this new combined CIA data set, some general conclusions are still possible.

1. There are some fairly clear relationships among all the variables tested. Individual Product Brand Preference is declining, No Brand Preference is growing.
2. Consumer media usage is shifting dramatically….away from traditional mass media such Television, Newspapers and Magazines….as is the influence of those media forms on consumer brand purchases. Since TV has been the "backbone" of most Manufacturer Product Brand promotional programs for decades, this shift appears to be having some impact on how consumers view brands.
3. The shift of consumer time and interest to Mobile, Social and other interactive forms is clearly evident. While brand managers likely recognized this change, the shift is not advantageous to brand managers who seem to believe these new media forms can be harnessed to help build brands going forward. Our analysis does not support that view. The influence of social media has not replaced mass media and may, in fact, be detrimental to brand growth.
4. Most disturbing is that Manufacturer Product Brands seemingly are no longer able to differentiate essentially commoditized products among brand purchasers. The rapid and dominant growth of No Brand Preference indicates that whatever value Manufacturer Product Brands provided customers in the past; they no longer do so, certainly not with social media users.

It appears brand managers can no longer rely on their past experience and continue to use their previous promotional approaches to build and maintain brands through their traditional efforts. Given the study results, a new research agenda for brands and branding has been developed. It follows.

VIII. A New Research Agenda for Brands and Branding

Some suggestions for a new view of brand management and branding research have emerged from this initial study.

1. Research developed to build and support traditional Manufacturer Product Brand value is no longer relevant. New concepts must be developed. Historically, brand research has been rooted in western, consumer, psychologically-based attitudinal models, developed a half-century ago. The question that rises is how relevant those models are for a multi-cultural, global marketplace where speed, new products and

price competition are the rules of the day. We need new evidence of the applicability of our previous research literature.

2. Most traditional Manufacturer Product Brand research has been based on findings developed among consumers of mass media dominated, mass communication systems. Brand managers could control most of the brand messages and manage consumer views. Has the rapidly increasing interactive marketplace changed how Manufacturer Product Brands can and should be conceived and managed? Is it time to start including consumers in brand development and measurement rather than presenting the brand as a manufacturer-based fait accompli, created and managed by the brand owner?
3. Are consumers really shifting how they perceive and select Manufacturer Product Brands that is, placing more confidence in the retailers or distribution systems than in the manufacturer brands? What does that mean for Manufacturer Product Brands compared to Retail Store Brands? How important can, and, will the Retail Store Brand be in overall marketing programs going forward?
4. Are Manufacturer Product Brands still relevant as consumer cultural and individual icons? Are consumers, with a broad array of brands available, still willing to (a) pay a premium for a branded product and (b) willing to seek out a brand if it is not stocked in their favorite retail store? While this study involved only widely distributed and available consumer brands, stocked and sold in food stores, is or can distribution still be a major factor in future brand success?
5. Are the current methods of measuring brand value to the consumer and the manufacturer still relevant? Brand value is currently based on (a) consumer brand equity or, (b) economic value of the brand to the brand owner. Are those attitudinal and financial measures still relevant in an interactive marketplace, particularly where consumers have broad access to social media?

These are some of the questions which have arisen based on this initial research inquiry. We believe this type of longitudinal analysis, based on an understanding of the new social media, opens up multiple new areas for research and analysis. We welcome comments and suggestions on these initial findings and look forward to sharing the results of this consumer-based data on brands and branding with all levels of researchers in the future.

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Exhibit 1
Market Performance of Stores and Products

	Stores*	Products**
Share Leading Brand	26.52	15.89
AGR Leading Brand	0.54	-1.68
Share No Preference	25.66	50.22
AGR No Preference	1.21	1.38
Competitive Index	0.097	0.061
Net Promoter Score	19.48	-9.07

*Preferred store where product purchased

**73 product categories averaged over 10 years

Exhibit 2
Top Leading Brand Categories

Category	Leading Brand	Leading Share	AGR Leading	Store Brand	AGR Store	No Preference	AGR No Pref.
Bleach	Clorox	42.01	-3.36	8.61	4.95	40.21	4.15
Glass Cleaners	Windex	40.89	-4.39	5.19	-2.81	43.42	6.3
Razors	Gillette	35.84	-1.76	3.46	5.65	33.88	1.79
Aluminum Foils	Reynolds	35.84	-2.24	10.95	-3.33	42.22	3.13
Facial Tissue	Kleenex	34.98	1.14	5.79	4.41	34.38	-2.71
Dish Detergents	Dawn	30.88	-2.21	2.50	-3.06	41.76	6.45
Toothpaste	Crest	29.01	-2.69	0.65	4.50	24.23	6.64
Baby Shampoo	John & John	28.88	-3.36	2.09	-4.77	50.42	2.43
Insect Repellent	OFF!	27.63	-3.16			56.61	1.47
Tooth Brushes	Oral B	27.51	-1.21	2.70	1.74	32.60	2.25
Sports Drink	Gatorade	26.53	0.34			61.20	-1.15
Laundry Detergent	Tide	26.46	-3.40	2.13	2.03	32.85	12.06
Food Storage Bags	Ziploc	25.81	-2.38	9.08	-0.90	40.60	3.34
Toilet Tissue	Charmin	24.75	3.46	4.95	4.66	26.88	-4.78

Exhibit 3
Lowest Leading Brand Categories

Category	Leading Brand	Leading Share	AGR Leading	Store Brand	AGR Store	No Preference	AGR No Pref.
Cough Medicine - Child	Robitussin	3.14	-8.29	1.69	-4.92	82.79	0.39
Fiber Supplements	Metamucil	3.64	-3.17	2.29	-1.83	80.25	-0.21
Pain Relievers - Creams	Icy/Hot	3.71	6.24	2.94	-2.90	76.94	0.31
Cold & Flu - Children	Tylenol	3.88	-4.70	1.51	-4.89	85.30	0.3
Sinus or Allergy	Benadryl	4.74	-1.28	5.24	-2.74	65.11	1.51
Mousse/Styling Gel	Suave	5.15	-4.44	0.75	-2.66	65.08	0.32
Baby Bottles	Gerber	5.26	9.15	1.26	-12.81	70.63	-2.41
Non-Disp. Containers	Rubbermaid	5.58	-6.17	4.59	-0.80	68.57	1.3
Dinner Entrees	Stouffers	6.19	-7.67	1.57	4.59	50.95	1.95
Facial Cleansers	Oil of Olay	6.28	-3.95	0.32		54.54	-0.42
Coloring/Rinses	Clairol	6.29	-6.58			74.32	-0.02
Breakfast Bars	Quaker	6.30		1.37		62.38	
Napkins	Bounty	6.40	12.49	14.85	-0.25	55.71	-0.39
Hair Spray	Suave	6.92	-3.56	0.51	1.21	63.11	0.51

Exhibit 4
Leading Share Quintiles Categories

Quintile	Leading Share	AGR Leading	Store Brand	AGR Store	No Preference	AGR No Pref.
5 (Top)	31.22	-1.80	4.15	0.93	40.09	2.96
4	20.05	-1.91	3.05	0.27	46.77	1.00
3	13.61	-2.51	3.51	-1.30	42.95	2.23
2	9.64	-0.41	3.82	-2.24	53.55	0.32
1	5.25	-1.57	2.78	-2.00	68.26	0.22
Total	15.89	-1.64	3.46	-0.88	50.22	1.34

Exhibit 5
TV and Internet Usage in Average Minutes per Day

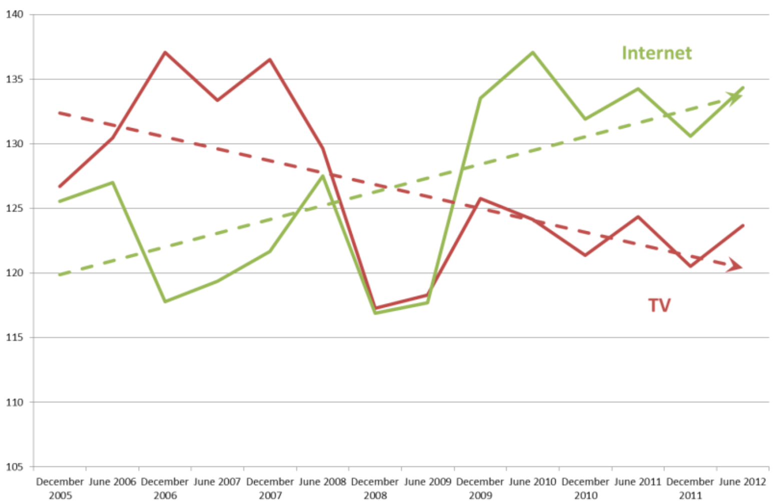

Exhibit 6
Average Daily Media Consumption

Mass Media	Minutes/Day	AGR
TV	123.7	-1.5
Radio (Terrestial)	67.4	-0.6
Web Radio	23.5	10.8
Satellite Radio	*21.0*	*4.3*
Direct Mail	*51.8*	*0.2*
Magazines	42.6	-2.9
Newspapers	37.9	-2.5
Digital Media		
Internet	134.4	1.7
Video Games	48.2	-0.1
Blogs	15.6	5.3
Communication Media		
email	124.8	1.2
IM	45.8	2.4

Exhibit 7
Average Traditional Media Influence

	Influence Percent	AGR
Word of Mouth	32.1	0.1
Read an Article	18.0	-0.3
Retail Media		
Coupons	26.9	2.8
In-store	23.6	6.4
Inserts	17.6	-3.6
Mass Media		
TV	22.4	-0.8
Cable	15.0	0.2
Direct Mail	18.0	1.0
Newspaper	15.3	-1.5
Magazines	14.7	-2.7
Radio (Terrestial)	12.1	0.2
Satellite Radio	4.5	8.1
Outdoor	7.8	1.9
Yellow Pages	6.6	-2.6

Exhibit 8
Average Digital Media Influence

Computer Media	Influence Percent	AGR
Internet	14.7	4.5
Blogs	6.8	18.0
Video (Downloads)	5.4	11.4
Video Games	4.5	20.3
Web Radio	4.4	11.9
Conversational Media		
email	15.0	7.2
Social Media	9.9	15.7
Mobile Media	7.6	26.1
Texting	5.6	22.8
IM	5.0	11.2