

Communication • Advantage • Global • Dynamic • Innovation • Understanding • Insight • Brands • Creative • Marketing • Knowledge • Strategic
Consumer • Solutions • Research • Convergence • ROI • Technology • Ideas • Leader • Analysis • Focus • Relationships • Future • Consulting
Experience • Satisfaction • Vision • Momentum • Advertising • Media • Evaluation • Multicultural • Information • Opportunity • Qualitative • Crossmedia
Optimization • Predictive • Intelligence • Quantitative • Impact • Loyalty • Online • Measurement • Attitudes • Clarity • Internet • Conceptual • Emotion
Impression • Performance • Digital • Impact • Positioning • Youth • Ideas • Momentum • Consulting • Communication • Advantage • Global • Dynamic
Innovation • Understanding • Convergence • Brands • Creative • Marketing • Knowledge • Strategic • Consumer • Solutions • Research • Insight • ROI

'all' Small and Mighty Campaign Analysis



Impression • Performance • Digital • Impact • Positioning • Youth • Ideas • Momentum • Consulting • Communication • Advantage • Global • Dynamic
Innovation • Understanding • Convergence • Brands • Creative • Marketing • Knowledge • Strategic • Consumer • Solutions • Research • Insight • ROI
Technology • Leader • Analysis • Ideas • Focus • Relationships • Future • Consulting • Experience • Satisfaction • Vision • Momentum • Advertising
Media • Evaluation • Multicultural • Information • Opportunity • Qualitative • Crossmedia • Optimization • Predictive • Impact • Quantitative • Intelligence
Loyalty • Online • Measurement • Clarity • Attitudes • Internet • Conceptual • Emotion • Impression • Performance • Positioning • Digital • Impact
Communication • Advantage • Global • Dynamic • Innovation • Understanding • Insight • Brands • Creative • Marketing • Knowledge • Strategic
Consumer • Solutions • Research • Convergence • ROI • Technology • Ideas • Leader • Analysis • Focus • Relationships • Future • Consulting
Experience • Satisfaction • Vision • Momentum • Advertising • Media • Evaluation • Multicultural • Information • Opportunity • Qualitative • Crossmedia

Prepared for:
Unilever HPC NA
January 2006



'all' Small and Mighty Summary



'all' launched a variant of laundry detergent in Q4 of 2005. The new 'all' Small and Mighty concentrated laundry detergent launch was supported by a TV ad campaign which was led by the 'Big World' ad (:30) and later accompanied by 'Drive-thru' ad (:15). Both ads were designed to communicate that 'all' Small and Mighty is 3X concentrated and works as well as regular laundry detergent.

Impact of 'Big World'

Although 'Big World' is well recognized and moderately linked to the 'all' brand, consumers don't connect it to the Small and Mighty variant.

- Recognition of 'Big World' is strong at 41%, compared to the norm 31%.
- Additionally, the ad performs reasonably well in terms of branding. The brand linkage score is at par with the norm. Currently we have a low base to analyze the brand linkage score and these initial results may change once we accumulate a sufficient base size.

Although there was a combination of a 30 sec ad and a 15 sec ad, the performance of the 30 sec ad could only have been enhanced by the 15 sec ad as they were meant to work in tandem. Both ads used the same product demo and were focused on delivering the same execution idea of 'less is more'

'all' Small and Mighty Summary

Novelty of 'all' Small and Mighty variant

The logo for 'all' is written in a bold, yellow, sans-serif font with a blue outline and a slight shadow effect.

Over half the respondents talk about 'concentrated detergent' when asked about new news in the laundry detergents category.

- About 40% also mention that detergent comes in a smaller bottle.
- These are indicators that Small & Mighty' is beginning to impact news in the category.

Performance of 'all' Small and Mighty variant

Recognition and trial of 'all' Small and Mighty is good compared to the performance of other variant launches.

- Over a third of the respondents recognize bottles of the 'all' Small and Mighty Laundry detergent. 'Tide with a touch of Downy' attained higher awareness levels in the period post launch. The higher awareness levels may have been helped by the use of two established brands, Tide and Downy as well as a possible higher media support.
- 17% of the respondents have tried 'all' Small and Mighty. These levels are comparable to Tide's (Touch of Downy) initial usage level post launch.

The new bottles clearly communicate the intended image about the variant. "Ease of use", "concentrated", "as effective as regular" are the strongest impressions communicated by the 'all' Small and Mighty bottles.

- About two-thirds associate 'all' Small and Mighty with being "easier to carry and store".
- Most consumers are indifferent to the new packaging. However among the remaining, most consumers have a positive feeling toward the new packaging.

About a quarter of the respondents will consider purchasing 'all' Small and Mighty concentrated detergent in the future.

'all' Small and Mighty Summary



Impact of 'all' Small and Mighty on the 'all' parent brand

Although the 'all' Small and Mighty campaign did not directly enhance the existing high saliency of 'all', the campaign did have an impact on 'all's brand image and consideration.

- Brand saliency for the 'all' remained constant since the 'all' Small and Mighty campaign launched. At these high levels of unaided brand awareness it usually takes a longer time to have a significant impact.
- In addition to enhancing brand appeal, the campaign increased some key brand perceptions that had decreased in the absence of advertising support. The parent brand 'all' regained strength on "growing more popular" and "offers something that other brands do not" with the new campaign.

'all' Small and Mighty Advertising

The word "all" is written in a stylized, bold, yellow font with a blue outline and a slight shadow, giving it a 3D appearance.

Prompted ad recognition

Captionless Ad (No text shown)

all 'Big World'



	all 'Big World'	Unilever HPC/Competitive Avg (Captionless Ads)
Recognition	41 ↑ (145)	31
Branding^	40 (30)*	35

↑ ↓ - Statistically significant at the 90% confidence level

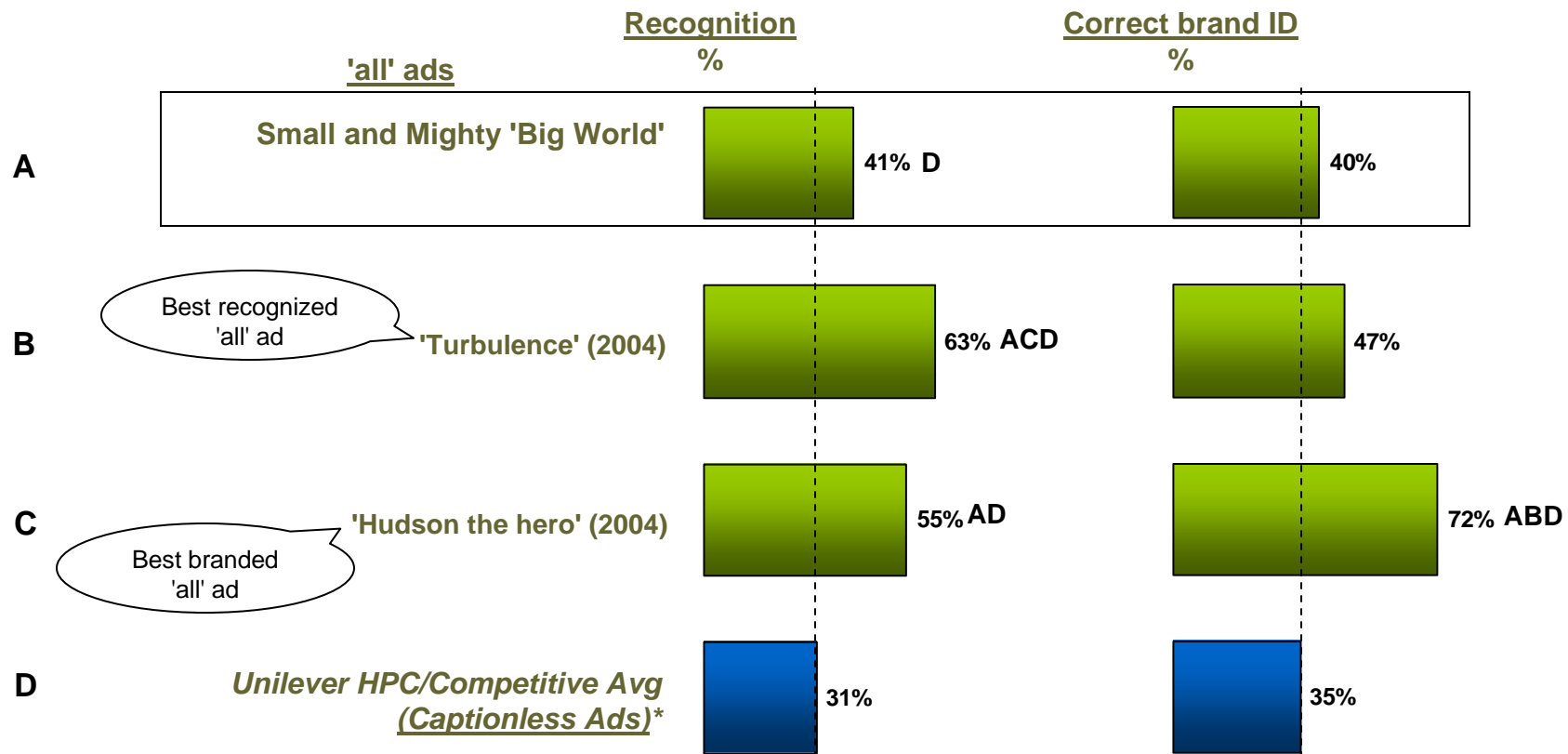
*Caution: Low Base Size

^ Branding base only reflects data coded till 12/18/2005



Prompted ad recognition

'Big World' is successful at being recognized on air and is moderate in branding compared to the norm. However, 'all' ads in the past have performed better.



Q.A3. Have you seen the following TV commercial before?

Q.A4. Please type in the name of the brand featured in the ad you just saw. Please be as specific as possible.

* Unilever HPC/Competitive Average (Captionless Ads) is based off 72 cases.

A/B/C/D = Statistically significant at the 90% confidence level against the Unilever HPC/Competitive Average (Captionless Ads)



'all' – Ad Diagnostics

'Big World' is strongly relevant to consumers as well as communicating new news, which is key in generating a rational response. Additionally, enjoyability is on par with previously good performing 'all' ads.

	Big World' A	Turbulence' B	Hudson the hero' C	Average** D
Enjoyed watching the commercial	59	57	59	54
Can relate to people in the commercial	44 BC	29	24	37 BC
Learned something new that I didn't know before	31 BCD	13	17	17 B
Made me more likely to buy the product	29	29	36	32
Message in the commercial is important to me	27	33	40 D	31
Getting tired of seeing the commercial	15	25 ACD	13	16
<i>Base: Recognized Ad</i>	(59)*	(227)	(104)	

Q.A5. Thinking about the ad you just saw, please tell me whether you agree or disagree with each of these statements.

* Caution: Low Base Size

** Unilever HPC/Competitive Average (Captionless Ads) is based off 72 cases



'all' – Message Communication

"Effectively cleans from a small bottle" comes through the strongest in 'Big World'.

	Big world'
Offers detergent that effectively cleans from a small bottle	81
Offers products with 3 times concentrated power	64
Deep cleans in cold water	37
Has a fresh new scent / Has a pleasant fragrance*	34
<i>Base: Recognized Ad</i>	<i>(59)*</i>

Q.A5. Thinking about the ad you just saw, please tell me whether you agree or disagree with each of these statements.

* Caution: Low Base Size



'all' Small and Mighty measures

The word "all" is written in a bold, yellow, italicized font with a blue outline, positioned in the bottom right corner of the slide.

New things seen or heard about laundry detergents

About half associate concentrated laundry detergent as a new thing in the laundry detergent category.

	%
Detergents that have added fabric softener	65
New fragrances	56
Concentrated detergent	51
Smaller bottle size	42
New bottle sizes	33
In-store product display	30
New bottle shapes	30
Coupons/Discounts	28
New price	23
New packaging design	21
New bottle color	19
Free gift attached to bottle	16
Larger bottle size	14
Other	25
<i>Base: Heard of new types of laundry</i>	<i>(57)*</i>

Q.AC39. What have you seen or heard new about laundry detergents?

* Caution: Low Base Size



Things heard about 'all' concentrated laundry detergent

The most associated thing with 'all' concentrated laundry detergent is that a "little does a lot".

	%
<u>Product characteristics (NET)</u>	<u>20</u>
A little does a lot	13
Strong / rugged / sturdy / powerful	5
<u>Efficacy (NET)</u>	<u>20</u>
Makes object look / feel clean / removes dirt	12
<u>Stains (NET)</u>	<u>10</u>
Removes / lifts stains better / best	7
Removes / gets tough / deep stains	3
<u>Aroma / fragrance (NET)</u>	<u>7</u>
Fresh scent / clean scent	3
Small / compact container	6
Concentrated	5
The stain lifter	3
Don't Know	42
Base: Total	(153)*

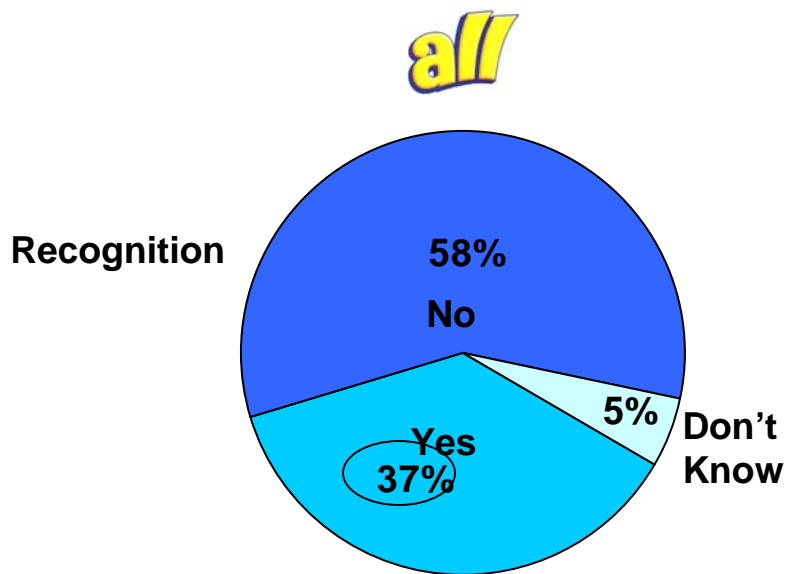
Q.AC41a. What are some of the things you remember seeing or hearing about 'all' concentrated laundry detergent?

* Note: Base size only included data coded upto 12/18/2005

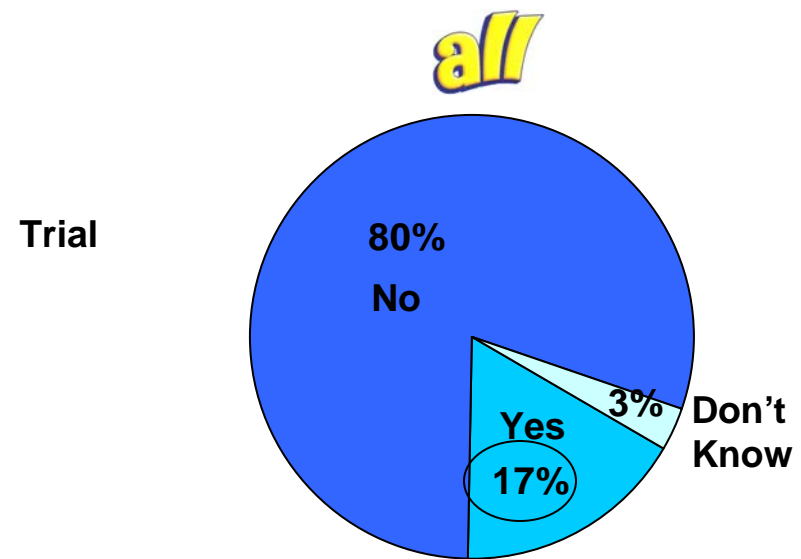


Recognition and Trial of products

Half of the respondents who recognize 'all' Small and Mighty products have tried it.



Base (Total) (273)



Base (Total) (273)

<u>Tide w/ touch of Downy – First 6 weeks</u>	
Seen or heard	47
Tried	21
Never heard/tried	18

Q.AC42. Have you seen the products shown below?

Q.AC43. Have you ever tried any of the products shown earlier?

Note: The 'all' data is not comparable to the Tide w/ touch of Downy as they are on different scales



'all' Small and Mighty - Impressions

In addition to package attractiveness, the strongest impression the 'all' Small and Mighty packaging gives is that it's "easy of use", "concentrated" and "as effective as regular sized laundry detergents" – which is in line with the objectives.

	<u>Top box</u> <u>('Strongly Does')</u>
	%
Is easier to carry and store	63
Is more concentrated than other brands	43
Effectively cleans as much laundry as regular sized laundry detergents	41
Is 3X concentrated	40
Cleans as well as regular laundry detergent	37
Has more attractive packaging than other brands	36
Is different from other laundry detergent brands	36
It offers just the right amount of concentration	35
Has improved cleaning performance	32
Makes your clothes smell fresh and clean	32
Removes stains effectively	31
Makes doing the laundry simpler and easier	31
Is appropriate for all my laundry needs	29
Is a brand you really trust	27
Is environmentally friendly	27
Is a good value	26
Cleans better than other brands	23
Base: Total	(273)

Q.AC44. How strongly does the new packaging give you the impression that 'all' Small and Mighty...?



Packaging

While most people are indifferent to the packaging, a third have a positive response.

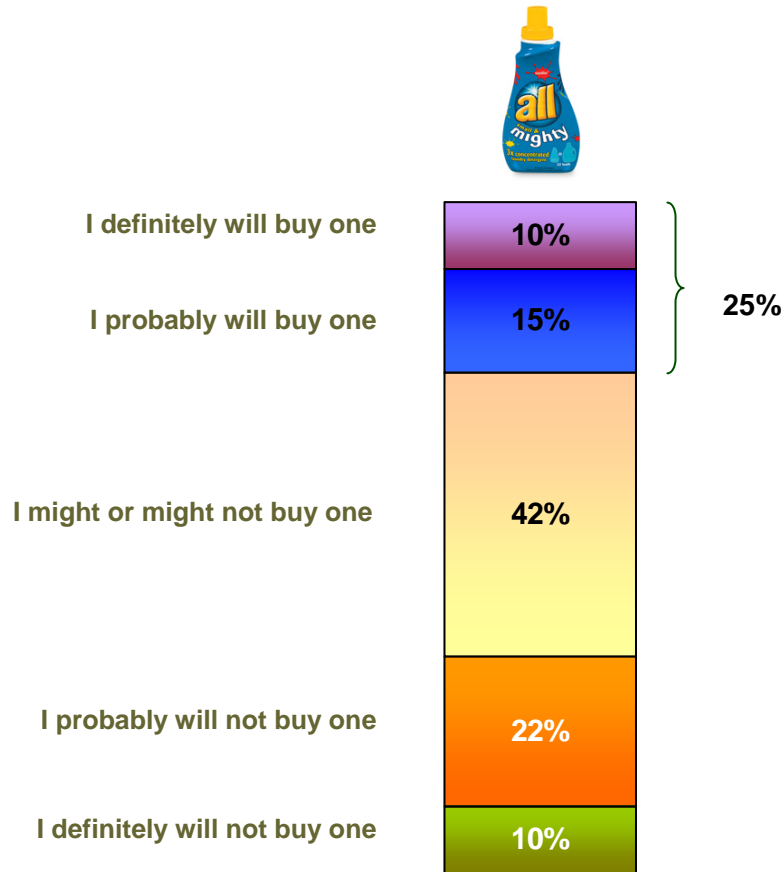
	Packaging
	<u>%</u>
More Positive	34
No Difference	64
More Negative	2
Base: Total	(273)

Q.AC46. How does the new packaging make you feel about 'all'?



Consideration of 'all' Small and Mighty

Being a new variant in the market, consideration for 'all' Small and Mighty is quite strong, probably benefiting from its association with the parent brand.



Base: Total (273)

Q.AC45. How likely are you to consider choosing 'all' Small and Mighty concentrated laundry detergents the next time you buy laundry detergent?

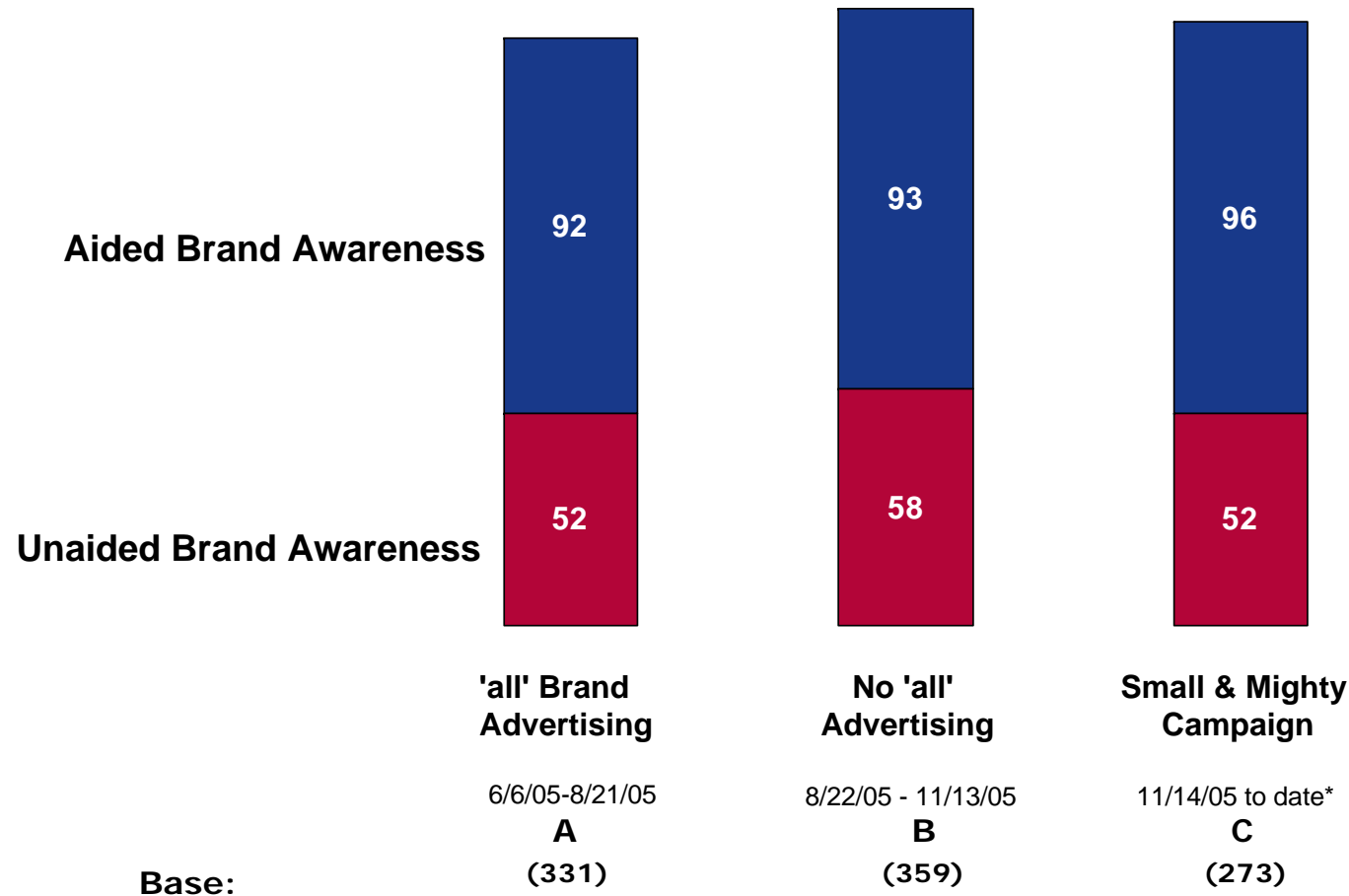


Impact of Small and Mighty on the 'all' brand measures



'all' Awareness

Brand saliency remained consistent to levels during the previous campaign and when no advertising ran.



*Note = Unaided brand awareness data until 12/18/05

A/B/C = Statistically significant at the 90% confidence level

Q1. What brands of laundry detergent have you ever seen or heard of?

Q2. Please indicate all the brands of laundry detergent shown below that you have ever seen or heard of, including those brands you just typed in at the previous question.



'all' – Impressions

The Small and Mighty campaign has positively impacted 'all's "popularity" and "appeal". Also, the brand is perceived as unique, since the launch of the Small and Mighty campaign.

	'all' Brand Advertising 6/6/05- 8/21/05	No 'all' Advertising 8/22/05- 11/13/05	Small and Mighty campaign 11/14/05 to date
	A	B	C
Are better quality than other brands	40	37	40
Are growing more popular	34 B	20	38 B
Appeal to me more than other brands	30	28	35 B
Meet the needs of me and/or my family	30	28	33
Have a higher opinion of than other brands	27	23	27
Work better than other brands	27	23	26
Are a better value for the price I pay than other brands	20	23	21
Offer something that other brands do not	19 B	14	24 B
Are more expensive than other brands	18 B	11	22 B
Cost more than I am prepared to pay	18 B	11	15
Are less expensive than other brands	17 BC	12	10
Do not appeal to me	16	15	13
Do not meet my needs	13	15	14
Do not work as well as other brands	7	8	5
Are poor quality for the price I pay	6	8	8
Are too cheap to be of acceptable quality	2	1	4 B
Are available where you usually shop	NA	80	82
Do people talk about a lot	NA	17	27 B
Base:	(331)	(359)	(273)

A/B/C = Statistically significant at the 90% confidence level

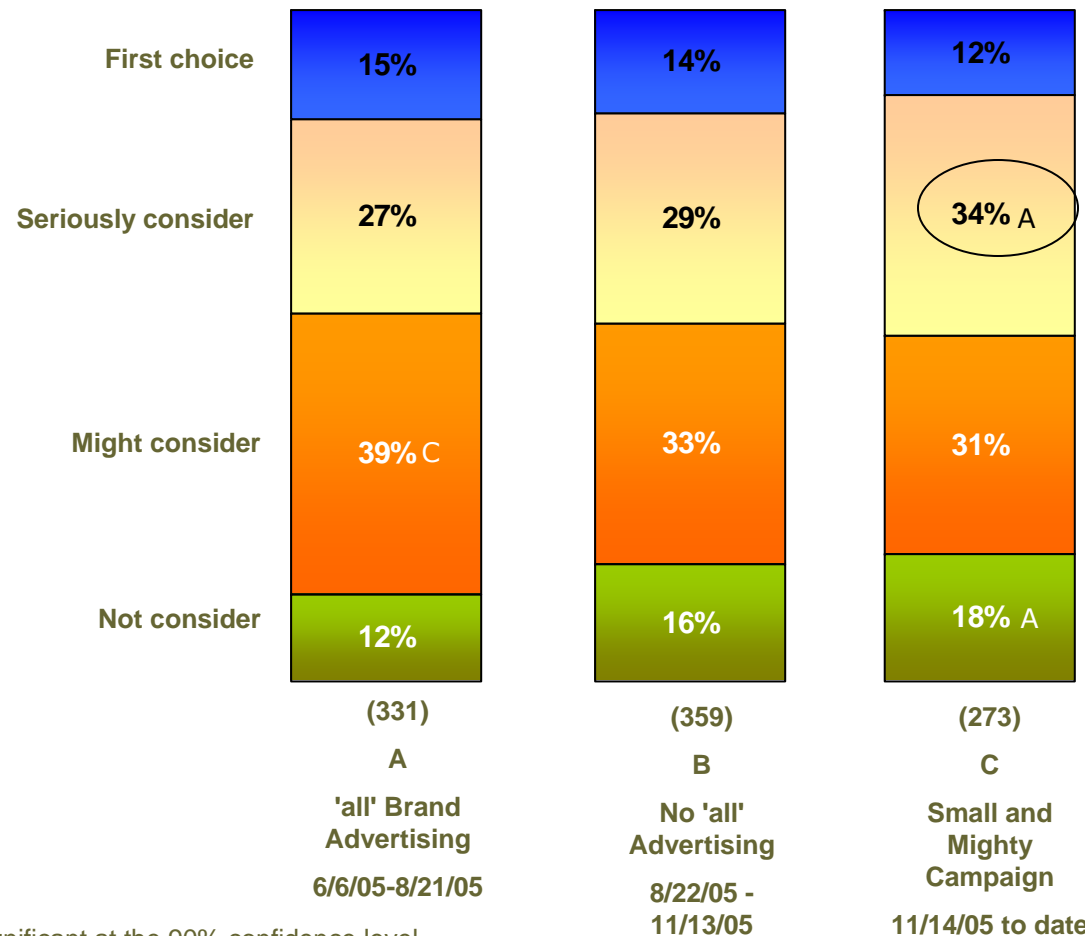
Q.B1. Based on anything you've seen or heard or any impressions you may have, which of these brands...?



Consideration

The impact on consideration of the Small and Mighty may be slightly polarizing. Compared to when the 'all' parent brand advertising ran, significantly more respondents mentioned they would "seriously consider" the brand as well as "not consider the brand".

Consideration of 'all'



A/B/C = Statistically significant at the 90% confidence level

Q.6. How likely are you to consider each of these brands the next time you buy laundry detergent?



What we know about launching variants

 all

Launching variants

Launching Variants	The purpose	<p>The purpose of advertising new variants is usually to:</p> <ul style="list-style-type: none"> -generate awareness/trial -communicate the proposition, especially how it <i>differs</i> from parent/other variants <p>Therefore it is critical that the variant's identity comes through clearly in the advertising</p>
	Common issue	<p>Most common problem:</p> <p>Assumption that by communicating variant's proposition and <i>umbrella</i> brand name... viewers will:</p> <ul style="list-style-type: none"> -realise it must be a new variant -listen out for the new variant's name (hence variant's name often mentioned as an 'aside')
	Need to make sure	<p>The ad needs to make it very clear to viewers:</p> <ul style="list-style-type: none"> -Exactly what it's called -What is is/how it differs -That it's new

Appendix

'all' Small and Mighty – Impressions among those who have tried Small and Mighty

	Top box ('Strongly Does')	
	Total %	Tried Small and Mighty %
Is easier to carry and store	63	60
Is more concentrated than other brands	43	30
Effectively cleans as much laundry as regular sized laundry detergents	41	36
Is 3X concentrated	40	34
Cleans as well as regular laundry detergent	37	34
Has more attractive packaging than other brands	36	32
Is different from other laundry detergent brands	36	32
It offers just the right amount of concentration	35	34
Makes your clothes smell fresh and clean	32	28
Has improved cleaning performance	32	23
Makes doing the laundry simpler and easier	31	28
Removes stains effectively	31	21
Is appropriate for all my laundry needs	29	21
Is environmentally friendly	27	23
Is a brand you really trust	27	21
Is a good value	26	30
Cleans better than other brands	23	15
Base: Total	(273)	(47)*

Q.AC44. How strongly does the new packaging give you the impression that 'all' Small and Mighty...?

* Caution: Low Base Size



'all' Small and Mighty – Impressions among those who are aware of 'all' Small and Mighty

	Aware of 'all' Small and Mighty %	Not Aware of 'all' Small and Mighty %
	A	B
Are available where you usually shop	89 B	78
Are better quality than other brands	53 B	30
Are growing more popular	51 B	30
Appeal to me more than other brands	44 B	29
Meet the needs of me and/or my family	44 B	25
Do people talk about a lot	35 B	21
Have a higher opinion of than other brands	35 B	22
Work better than other brands	35 B	20
Are a better value for the price I pay than other brands	31 B	14
Offer something that other brands do not	29	21
Are more expensive than other brands	20	23
Cost more than I am prepared to pay	14	15
Do not appeal to me	13	15
Do not meet my needs	13	16
Are less expensive than other brands	11	10
Are poor quality for the price I pay	10	8
Are too cheap to be of acceptable quality	6	3
Do not work as well as other brands	6	4
Base	(101)	(158)

Q.B1. Based on anything you've seen or heard or any impressions you may have, which of these brands...?

* Caution: Low Base Size



'all' Small and Mighty – Impressions among those who have tried 'all' Small and Mighty

	Tried 'all' Small and Mighty	Not tried 'all' Small and Mighty
	%	%
	A	B
Are available where you usually shop	89	81
Are growing more popular	60 B	33
Are better quality than other brands	45	38
Meet the needs of me and/or my family	40	31
Offer something that other brands do not	38 B	21
Appeal to me more than other brands	36	34
Do people talk about a lot	34	25
Have a higher opinion of than other brands	32	25
Are more expensive than other brands	28	20
Work better than other brands	28	25
Are a better value for the price I pay than other brands	21	20
Cost more than I am prepared to pay	17	13
Do not appeal to me	11	14
Do not meet my needs	11	15
Are less expensive than other brands	9	11
Do not work as well as other brands	4	5
Are poor quality for the price I pay	2	10
Are too cheap to be of acceptable quality	-	5
Base	(47)*	(218)

Q.B1. Based on anything you've seen or heard or any impressions you may have, which of these brands...?

* Caution: Low Base Size



Fabric Softener Purchase

	Purchase
	<u>%</u>
Yes	53
No	39
Don't Know	8
Base: Total	(273)

Q.AC47. Have you ever purchased concentrated liquid fabric softener?

