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Dove Face Care



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January 2006



Dove Face Care Advertising – Background & Issues



Background

Dove entered the Face Care category in 2003 with a new line of products. Alongside Dove launched an advertising campaign to introduce the new line using 'Pillow', 'Beautiful' and 'Row of Elements' ads. Testimonial ads, 'Sheryl' and 'Jennifer', were used as a follow-up in 2004.

Since mid-2004 Dove has not advertised in the Face Care category and does not plan to advertise in 2006. However the brand plans to develop a re-launch mix for 2007.

Issues

To ensure a successful re-launch in 2007 we're looking at Dove we will address the following:

- *How has the Dove advertising performed historically?*
- *What will be the effect of Dove not spending in 2006?*
- *At what levels should Dove spend 2007 to achieve TV ad awareness levels comparable to the market leader Olay?*

Summary



How did the previous Dove advertising performed?

'Pillow' and 'Sheryl' have performed better than 'Beautiful', 'Jennifer' and 'Row of Elements'.

- Although 'Beautiful' was not well recognized its branding was above average. Since it was the ad that introduced Dove to the category, it provided the newsworthy message about Dove entering the face care category with an innovative product to generate interest.
- Both the Dove 'Pillow' and 'Sheryl' ad are well recognized *and* branded. Respondents find 'Pillow' enjoyable to watch and the demonstration of the pillow usage in the ad provides new news in the category hence it's the most likely to generate a response.
- 'Jennifer' and 'Row of elements' did not breakthrough due to being less enjoyable than other Face Care ads.

What will be the effect of Dove not spending in 2006?

The lack of spend has not hurt Dove awareness in 2005 and as long as Dove continues spending in other categories, its halo will carry over into the Face Care category.

- Without any spend in 2005 Dove has been able to maintain its awareness levels similar to when it launched in 2003. These awareness levels are comparable to Olay which outspends every other brand in the category.
- In 2006, our model predicts that Dove will be able to maintain those levels of awareness as long as Dove continues spending in other categories.

Summary



What should Dove expect in 2007?

Assumptions

- Dove will have high impact ads (above average AI)
- Spend levels will be similar to those in 2003 and comparable to other Face Care brands in the category like L'Oreal, Neutrogena and Aveeno

Dove's resultant communication awareness levels will be enhanced to match the category leader Olay in Face care.

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Dynamic • Innovation • Insight
Brands • Focus • Ideas
Analysis • Focus
B2B • Media
Creative
Vision
ROI

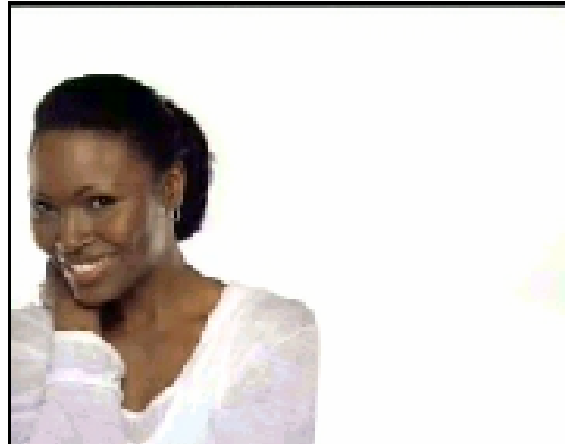
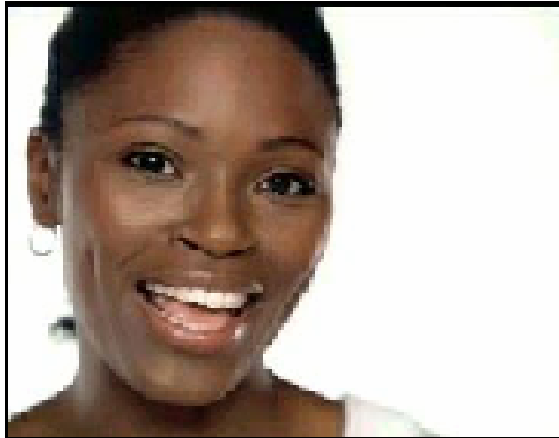
Past Dove advertising

ROI
Vision
Creative
B2B • Media
Analysis • Focus
Brands • Focus • Ideas
Dynamic • Innovation • Insight
Communication • Advantage • Global





	Ad	Average
Recognition	46	33
Branding	52	25



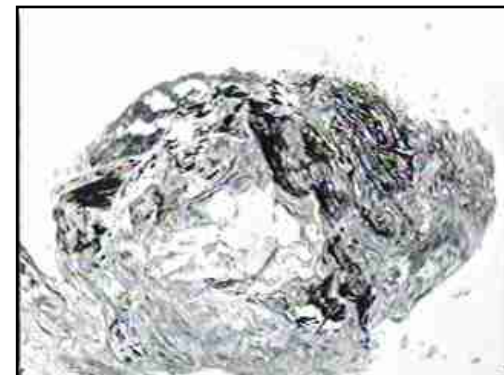
	Ad	Average
Recognition	41	33
Branding	52	25



	Ad	Average	
Recognition	24	33	
Branding	28	25	Facial

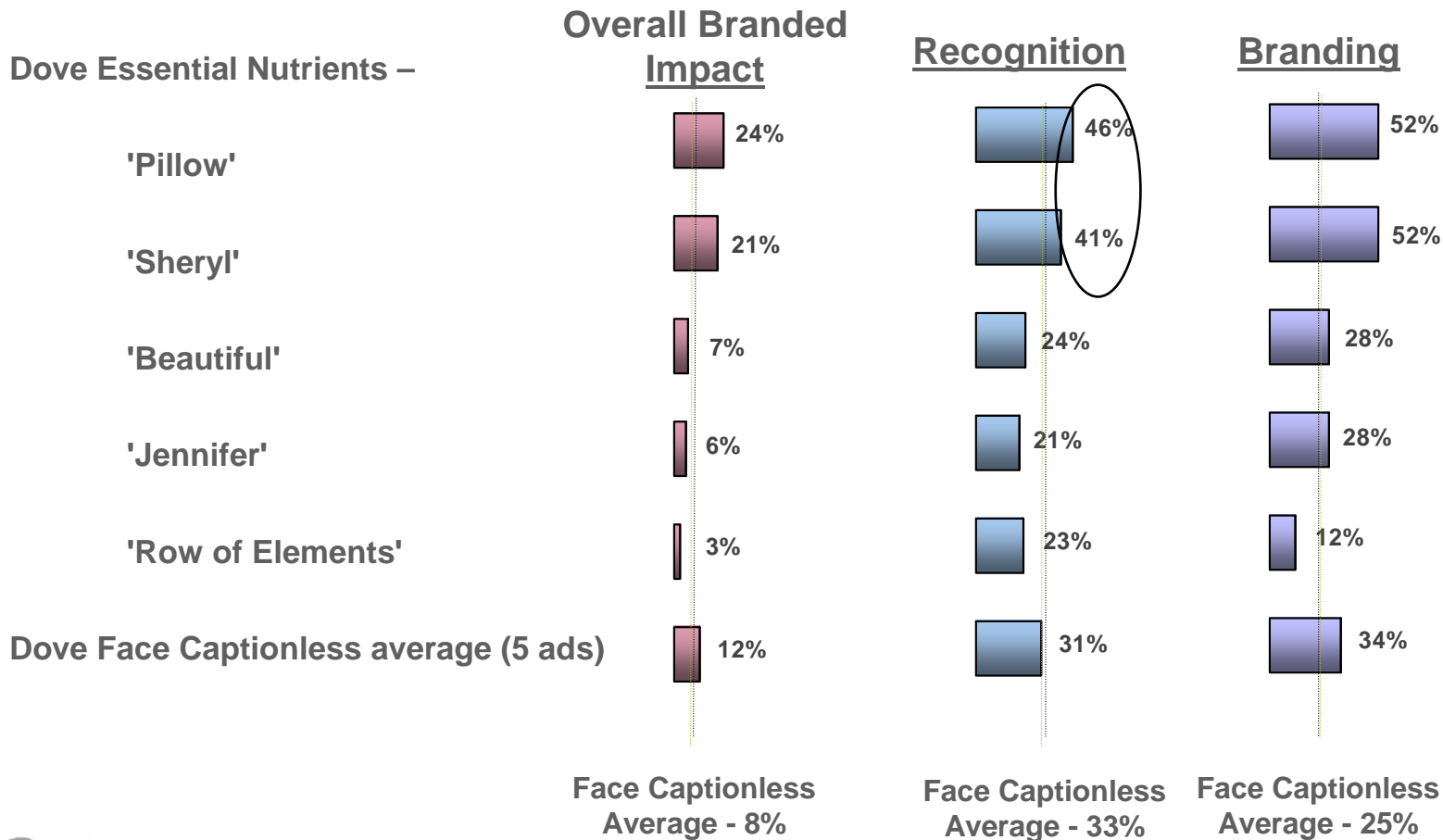


	Ad	Average
Recognition	21	33
Branding	28	25



	Ad	Average
Recognition	23	33
Branding	12	25

'Pillow' and 'Sheryl' exceeded the recognition and branding norms and achieved above average on air visibility compared to the face care average (8%).



Overall face caption-less average is made up of 5 Dove ads, and 12 competitive ads.

Dove ads have moderate to strong branding overall. However among the consumers unable to identify Dove, there is a large misattribution to Olay.

	Dove Essential Nutrients					Face Care Average*
	'Pillow'	'Sheryl'	'Beautiful'	'Jennifer'	'Row of Elements'	
Dove	51↑	49↑	27	27	11↓	25
<u>Misattribution</u>	<u>26</u>	<u>35</u>	<u>48</u>	<u>40</u>	<u>69</u>	
Olay	14	21	14	20	30	
Pond's	6	8	3	7	16	
Aveeno	1	1	5	-	5	
Neutrogena	-	1	10	7	11	
Don't know	23	16	25	33	20	
Base	(95)	(87)	(59)	(81)	(44)	

↑ ↓ Significantly different compared to the Face Care Average

*Overall face caption-less average is made up of 5 Dove ads, and 12 competitive ads.

'Pillow' and 'Sheryl' achieve high recognition as they are more enjoyable to watch. Additionally, 'Pillow' being part of the launch ads for Dove in the Face Care category is the most newsworthy and generates the highest response.

	Dove Essential Nutrients					Dove Face Care Ad Average	Face Care Average*
	'Pillow'	'Sheryl'	'Beautiful'	'Jennifer'	'Row of Elements'		
Enjoyed watching the commercial	63↑	56↑	53	38↓	43	51	47
Made me more likely to buy	58↑	41	46	41	34	44	39
Can relate to the people	47	36	37	38	30	38	39
Message is important	43	34	44	40	23↓	37	38
Learned something new	38↑	25	32	21	18	27	26
Getting tired of seeing the commercial	20	7↓	15	15	14	11	15
Base	(95)	(87)	(59)	(81)	(44)		

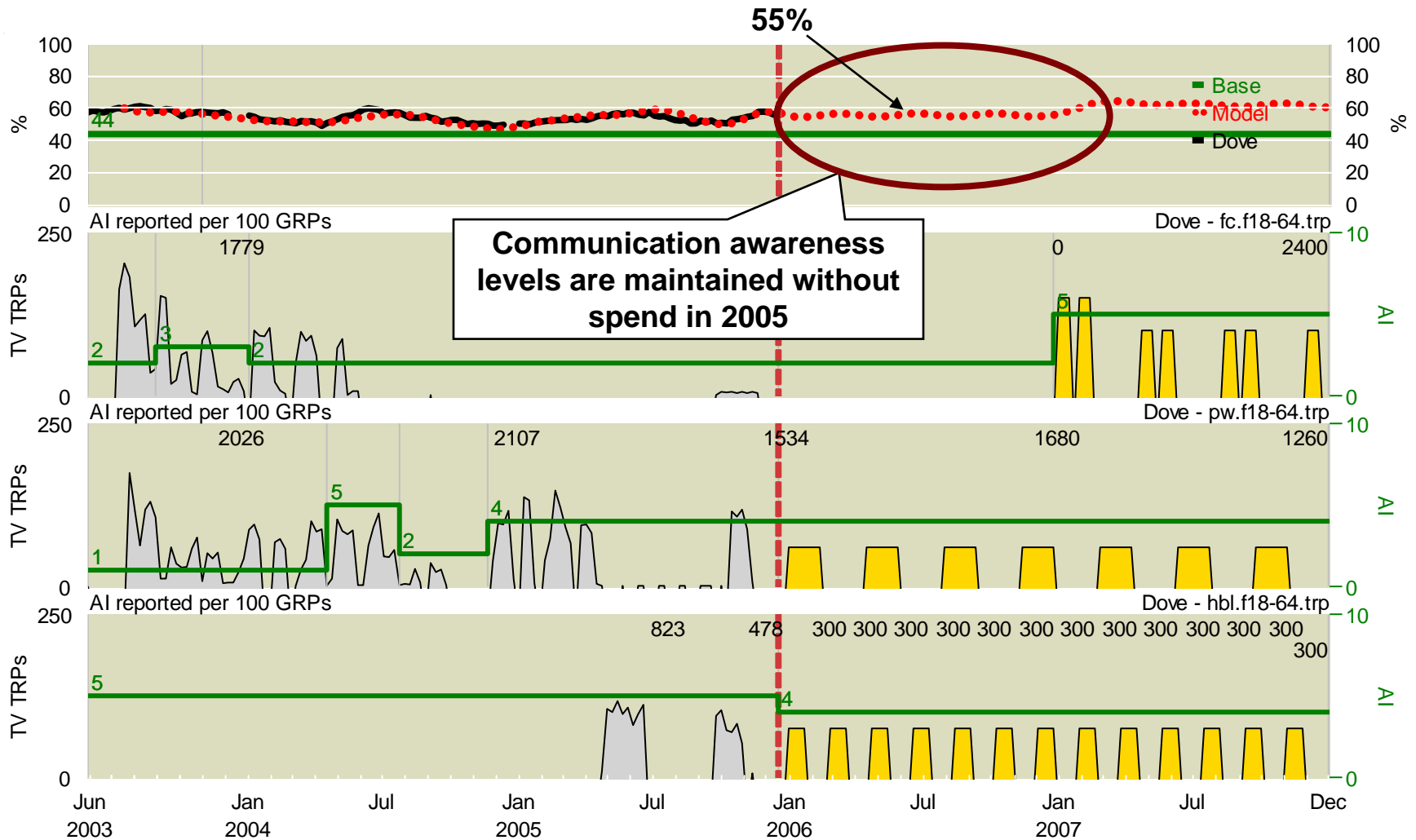
↑ ↓ Significantly different compared to the Face Care Average

*Overall face caption-less average is made up of 5 Dove ads, and 12 competitive ads.

Will Dove be able to sustain awareness during 2006?



With Dove continuing to spend in other skin care categories through 2005, it was able to benefit from the halo and maintain communication awareness in face care



A competitive perspective



If Dove decided to spend inline with competition brands like L'Oreal – which has spend levels akin to that of Dove in 2003 (during its launch phase)...

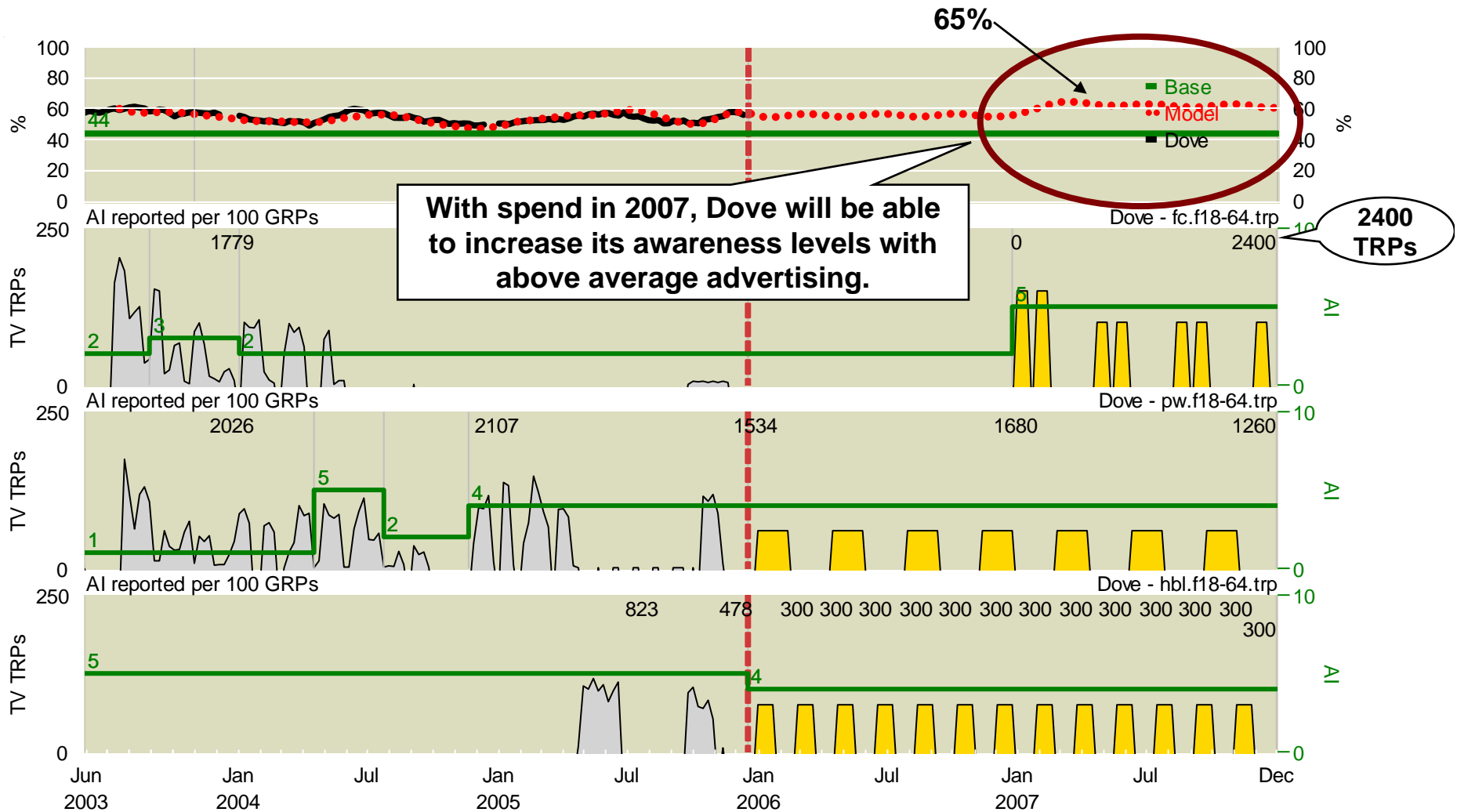
With even average impact ads (AI=5) Dove will be able to increase its communication awareness from 58% to 60%+

This awareness level is comparable to the market leader (Olay) in the category.

If Dove produced high impact ads (AI=8) then the same awareness levels can be reached using lesser spends.



Dove has the potential to enhance their awareness at levels comparable to the category leader with spend levels similar to 2003 and using above average ads.



By using above average ads Dove can achieve the highest communication awareness in the category without having to outspend its competitors.

TRPs	AI	Predicted Communication Awareness
2400	4	62
2400	5	65
2400	8	70
4000	4	65
4000	5	70
4000	8	75



Olay has a distinct communication strategy.

Annual GRPs behind Olay ads are on average 10,000 while those behind brands like L'Oreal – 2000, Dove – 2000 and other brands like Neutrogena & Ponds even lower.

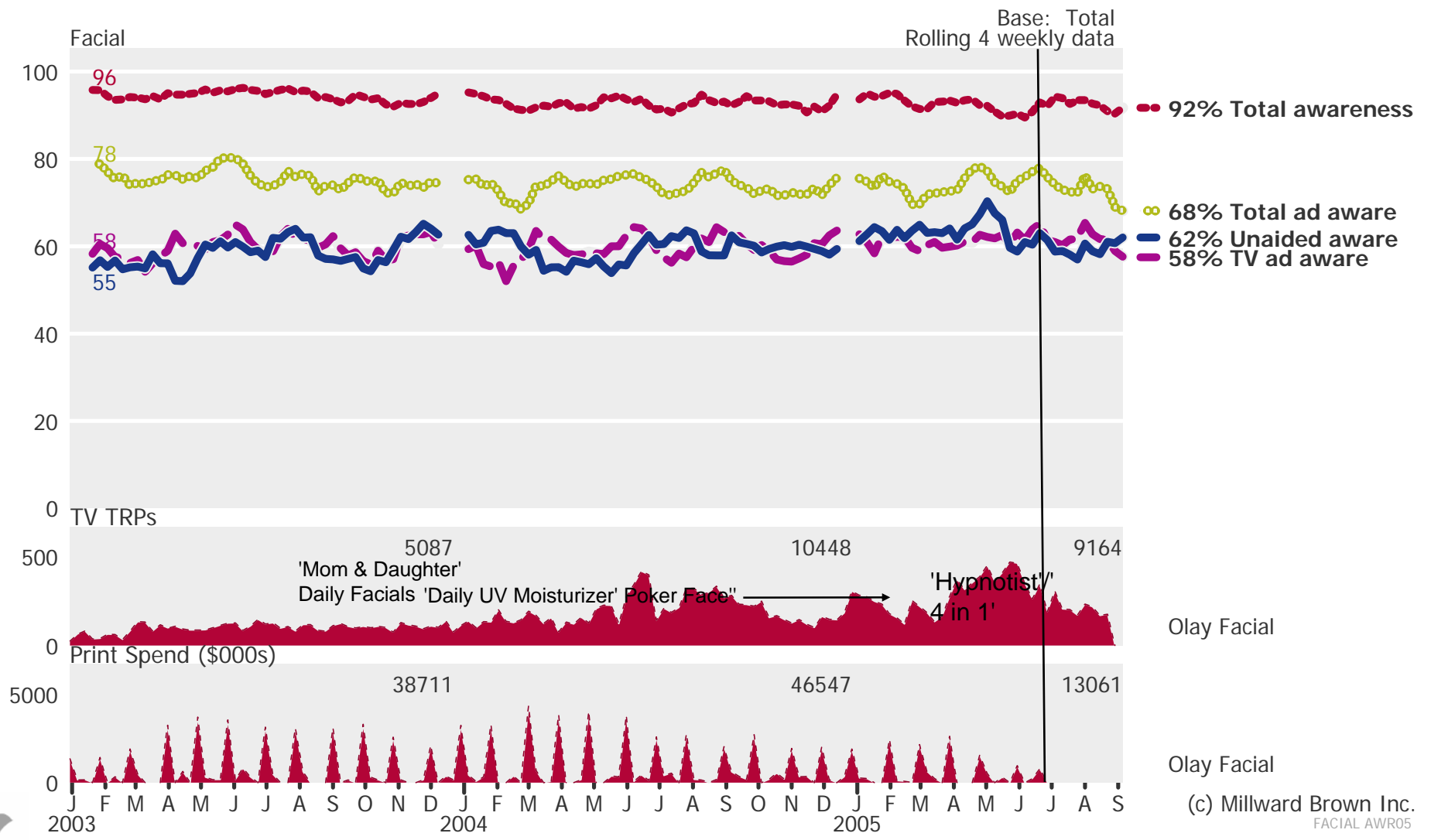
Olay uses a communication strategy comprising of multiple executions meant to work synergistically to reinforce the core proposition.

However, Olay is not as big a spender in other skin care categories and hence using their spend levels as a benchmark in face care is not recommended for Dove.



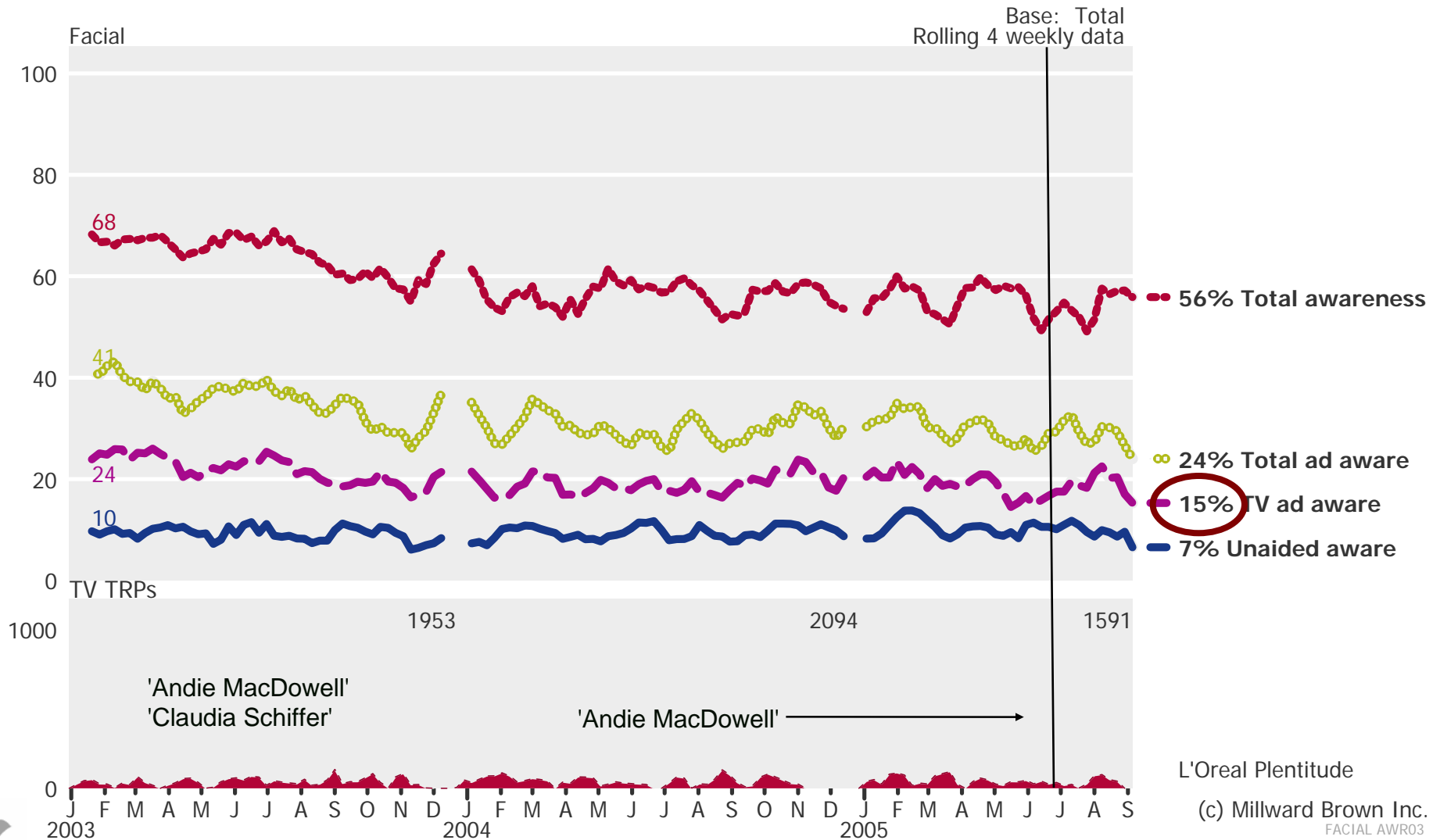
Olay still generates the same level of awareness with a substantially heavy spend in the face care category.

Olay Awareness Summary



With similar spend to Dove in 2004, L'Oreal is only able to generate a much lower awareness level. This is a result of a combination of factors: a) having poor impact ads (low AI) and b) lacking the benefit of halo from spends in other skin care categories.

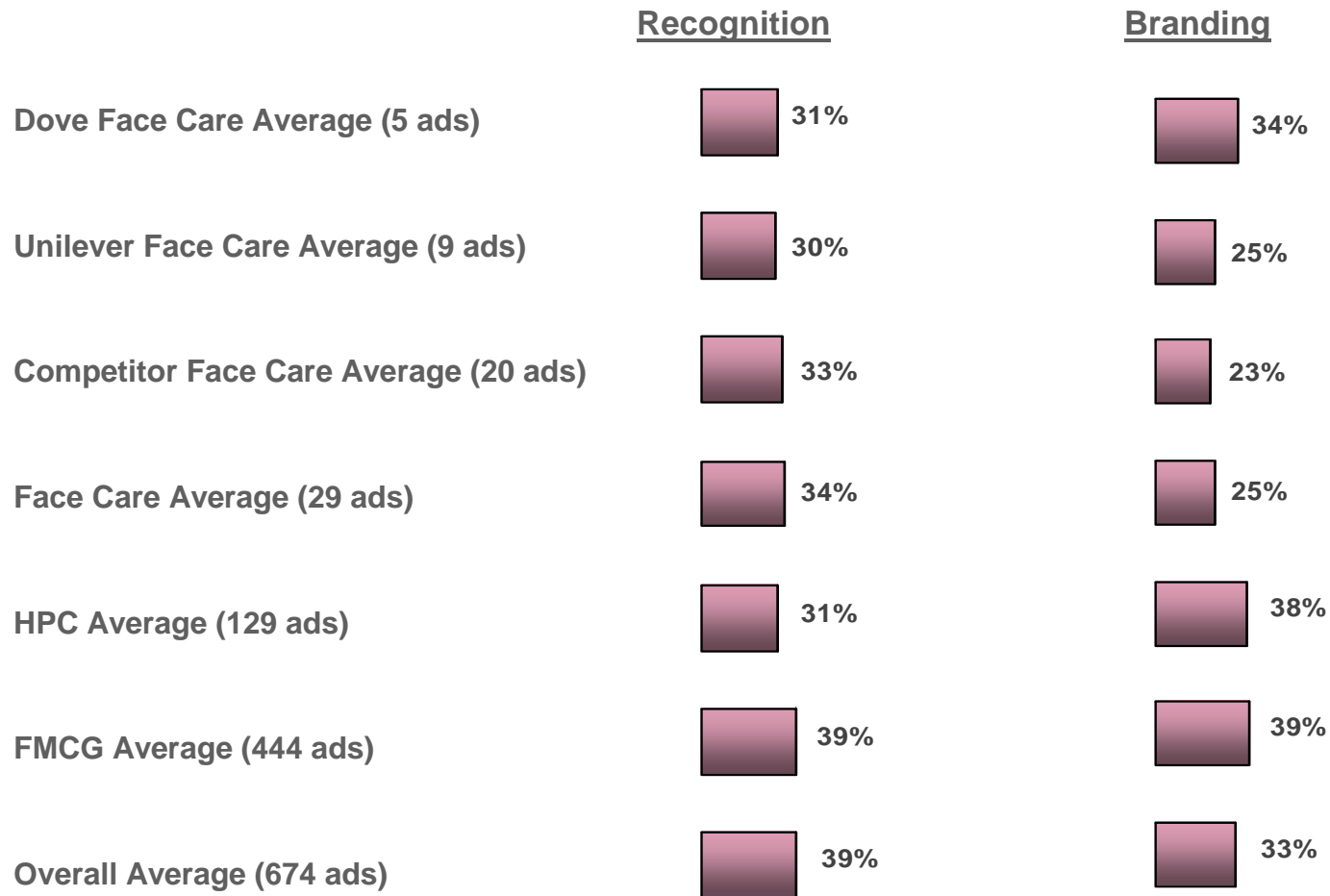
L'Oreal Plenitude Awareness Summary



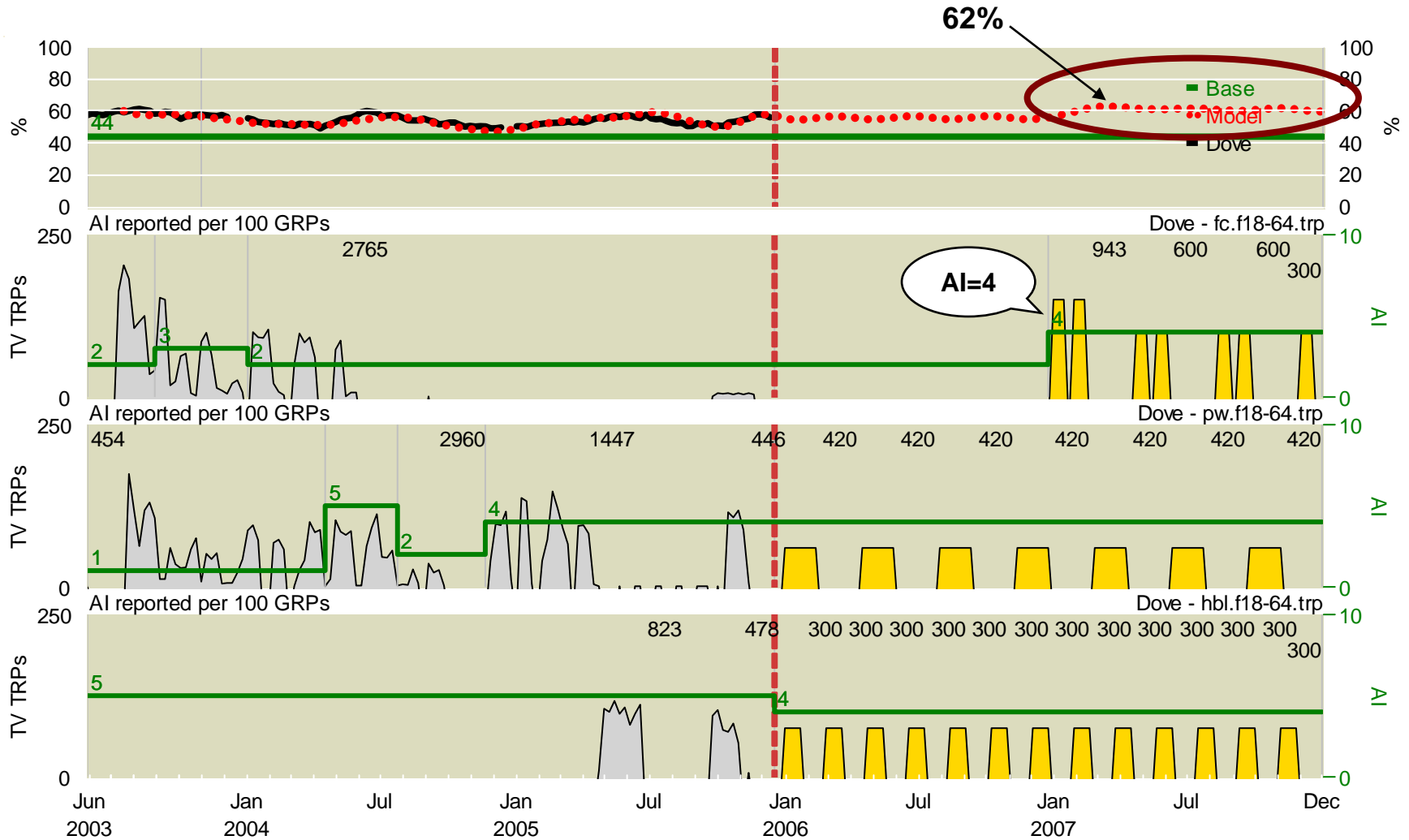
Appendix



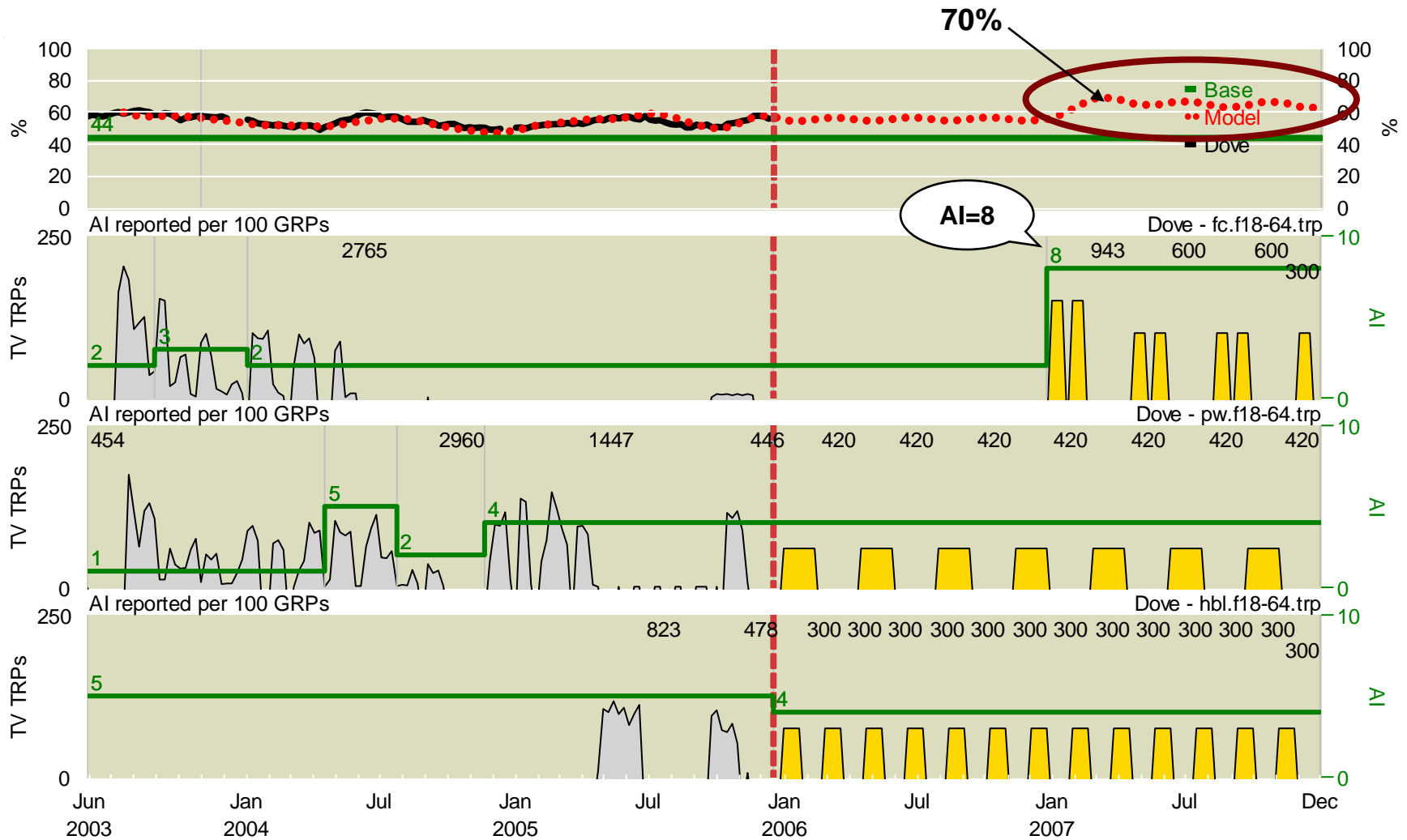
Category Comparison



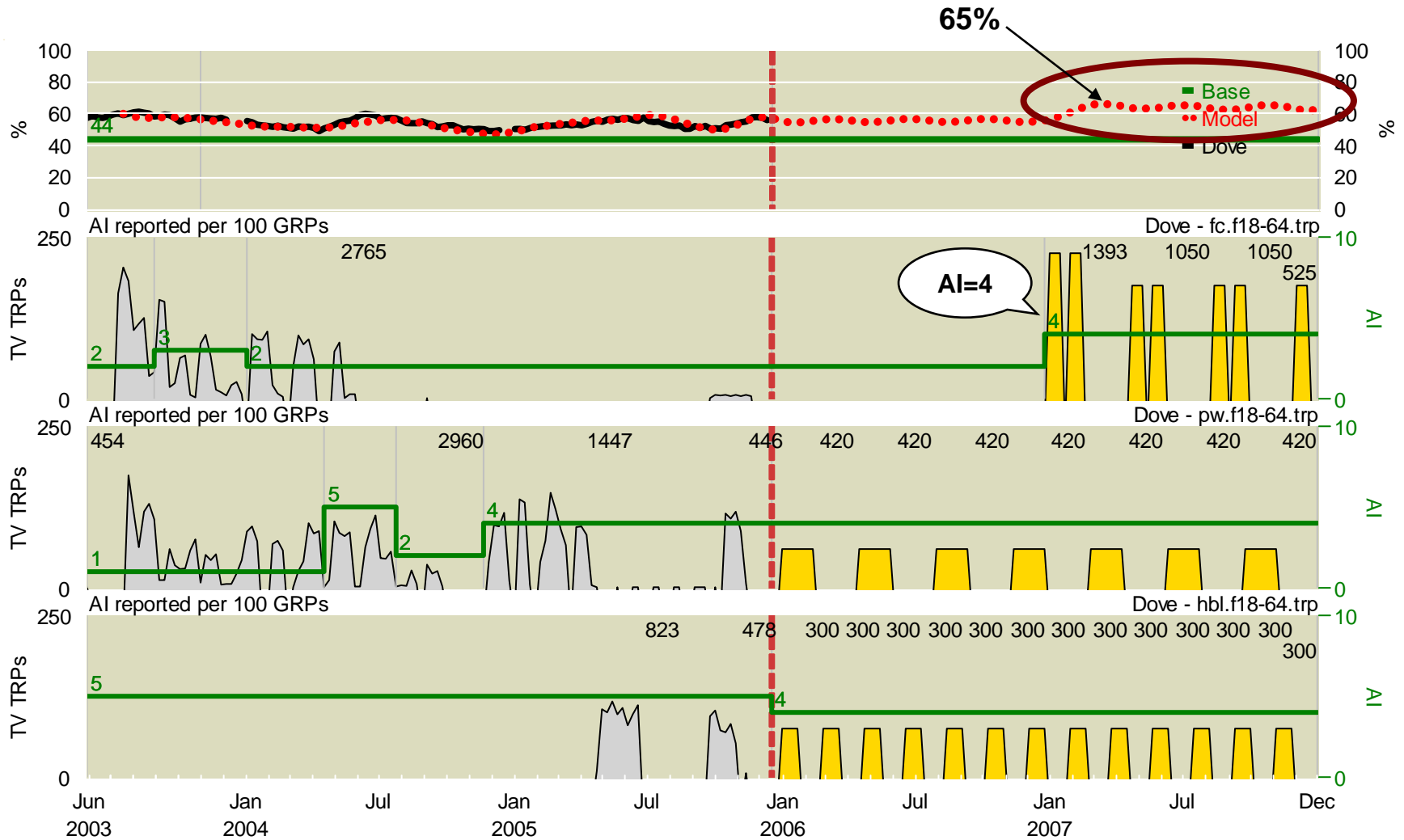
2400 TRPs with an **AI of 4** has the potential to generate communication awareness of **62%**



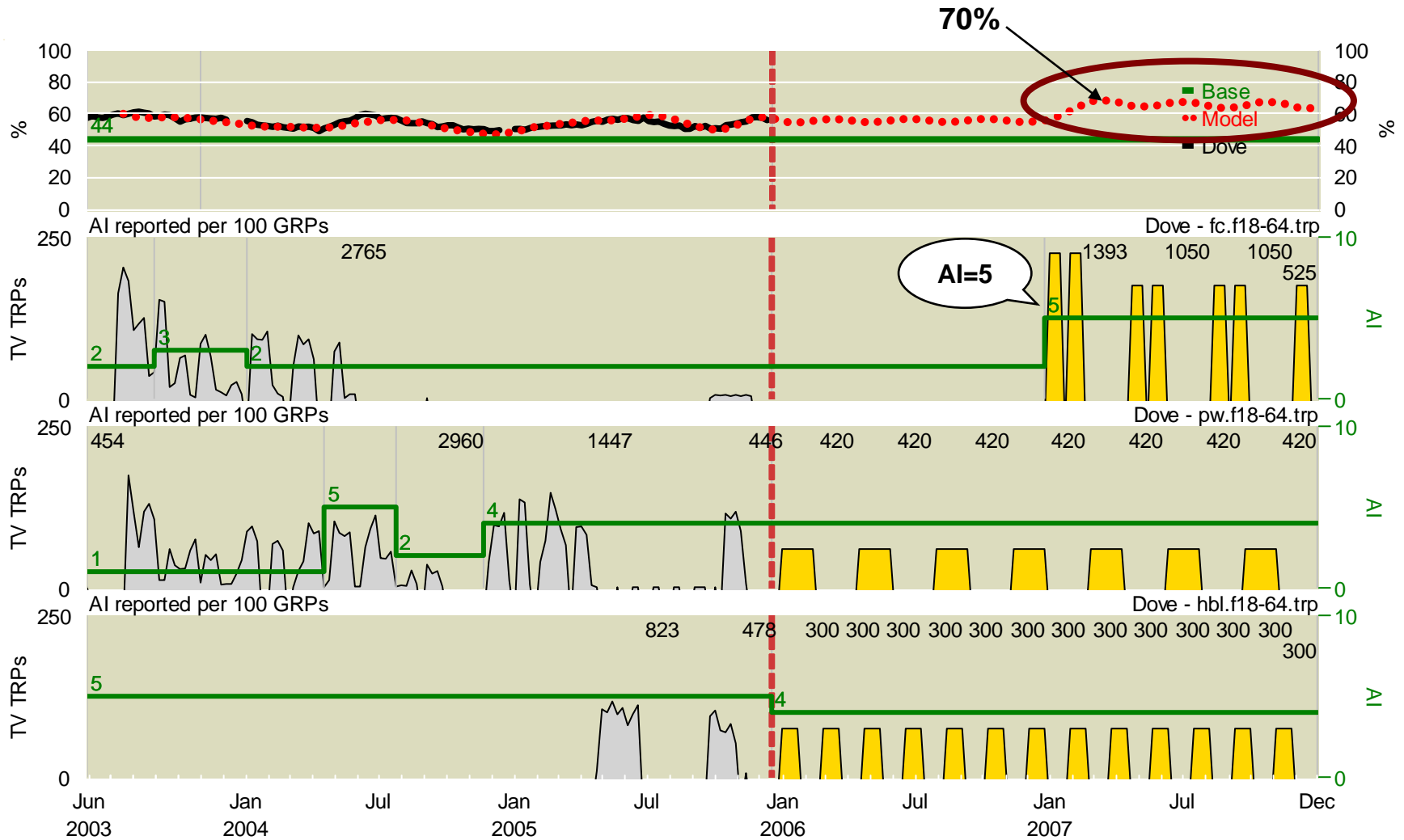
2400 TRPs with an **AI of 8** has the potential to generate communication awareness of **70%**



4000 TRPs with an **AI of 4** has the potential to generate communication awareness of **65%**



4000 TRPs with an **AI of 5** has the potential to generate communication awareness of **70%**



4000 TRPs with an **AI of 8** has the potential to generate communication awareness of **75%**

