

2005 Pond's Brand Audit (Face Care)

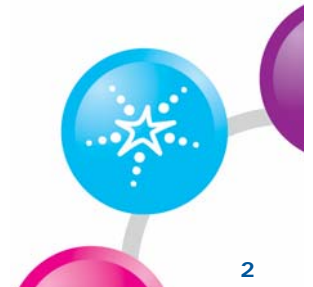
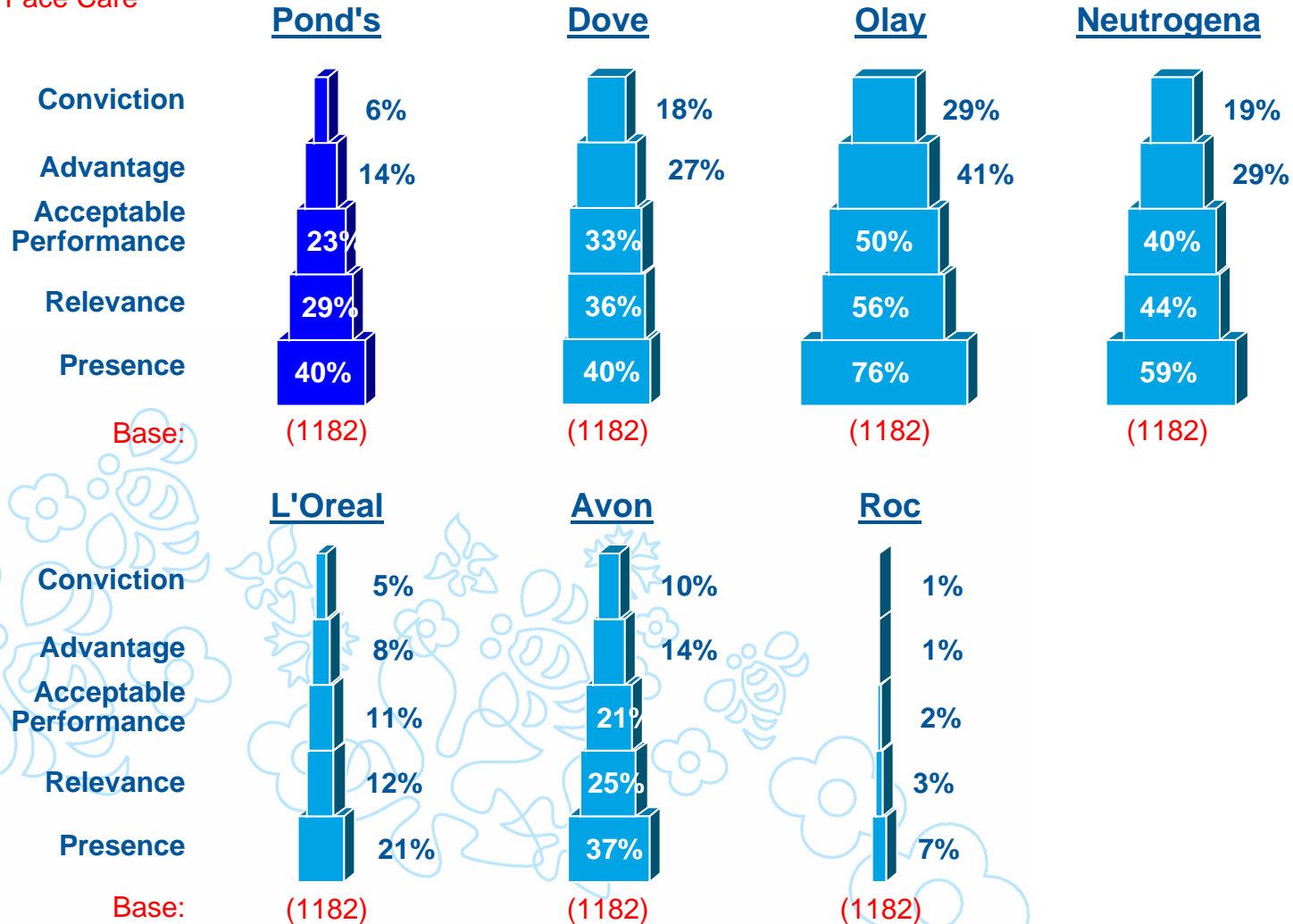


Brand Health Pyramids:

Pond's vs. competitors

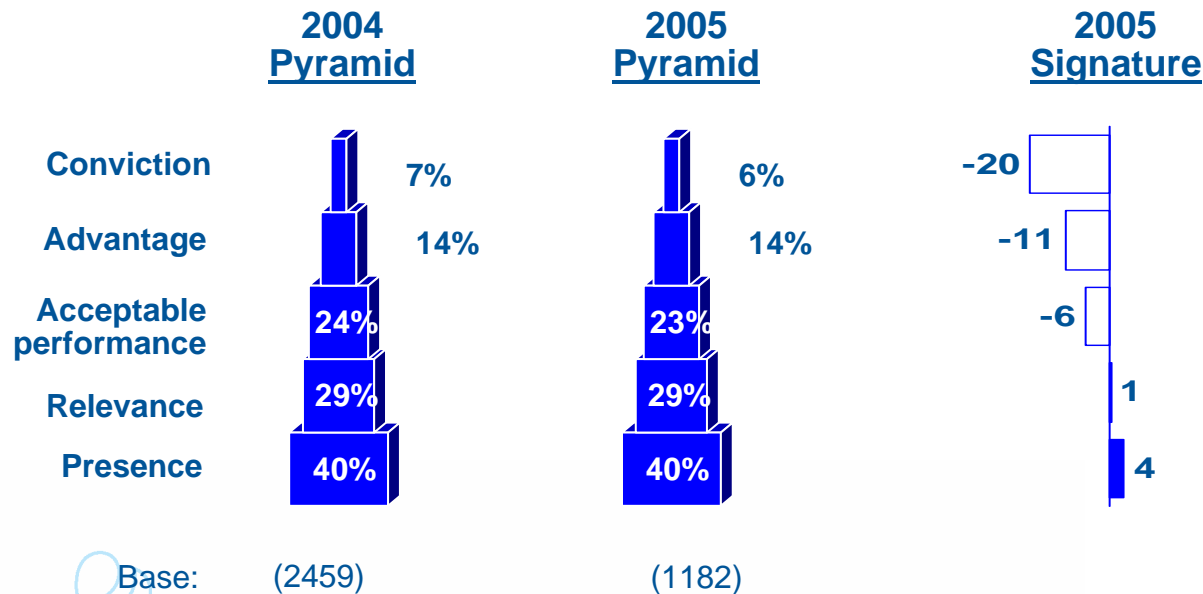
Pond's remains a relatively small brand in the category. Olay continues to lead the category

Data period: 2005
Context: Face Care



Brand Health Pyramid

Trended Pyramid & Signatures



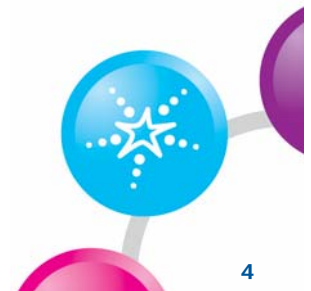
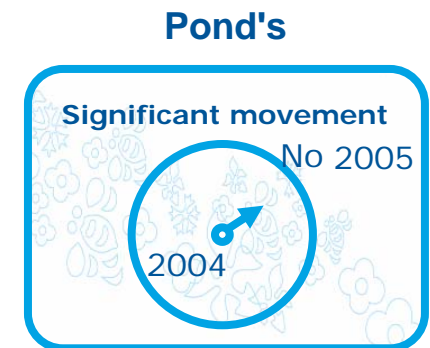
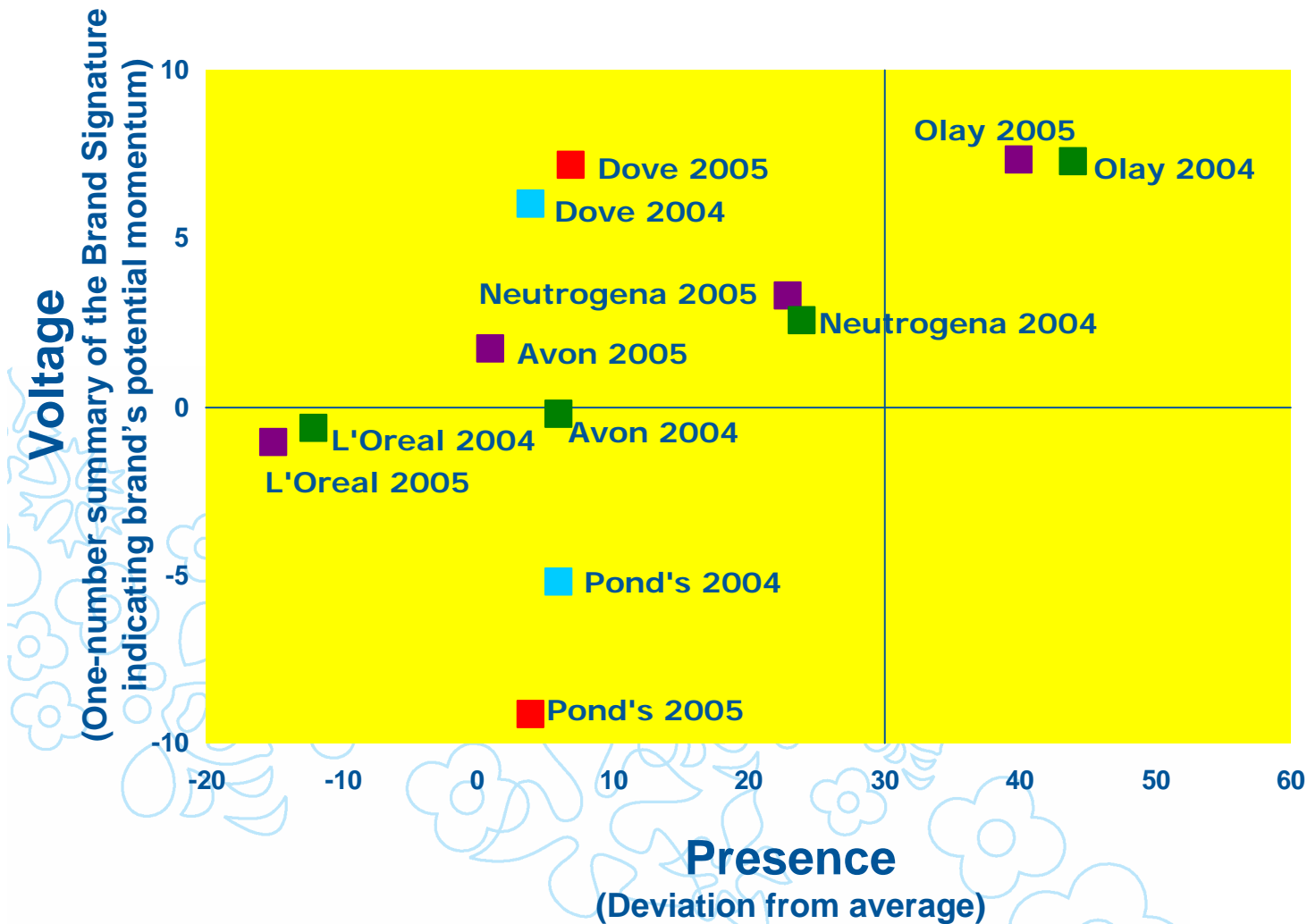
Pond's has not improved from 2004 lacking any impact from its re-launch on the anti-aging platform in 2005 (Project Aurora)

Pond's does not own any compelling benefits and hence continues to be weak at the higher levels of the pyramid

Brand Equity strength over time

Voltage x Presence

While Pond's continues to have a relatively low to moderate presence in the face care category, it has weakened in its potential for future growth



Brand Clarity

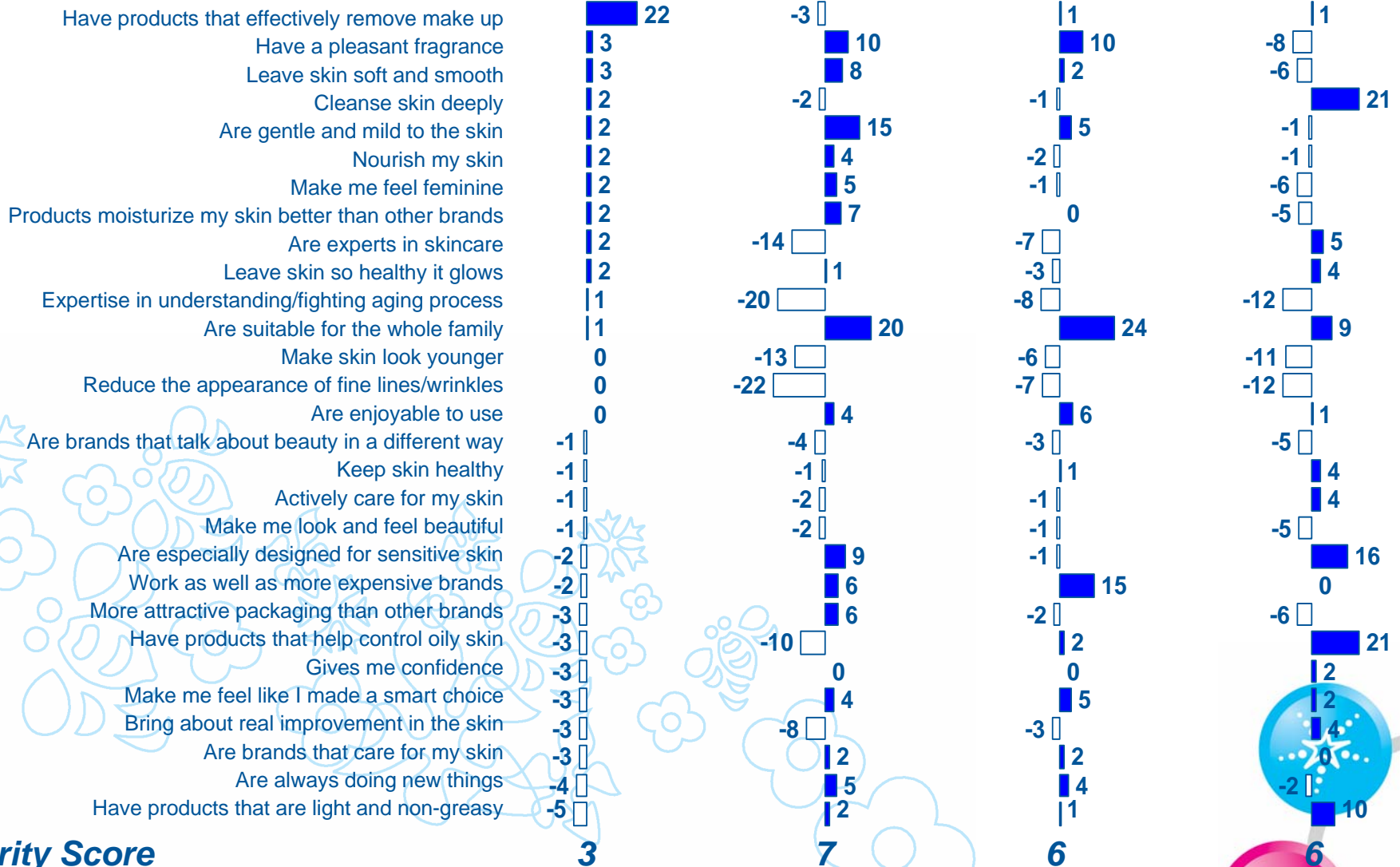
Despite the anti-aging launch re-launch in 2005, Pond's continues to be only seen as an effective make-up removal product without any other skin care benefits.

Pond's

Dove

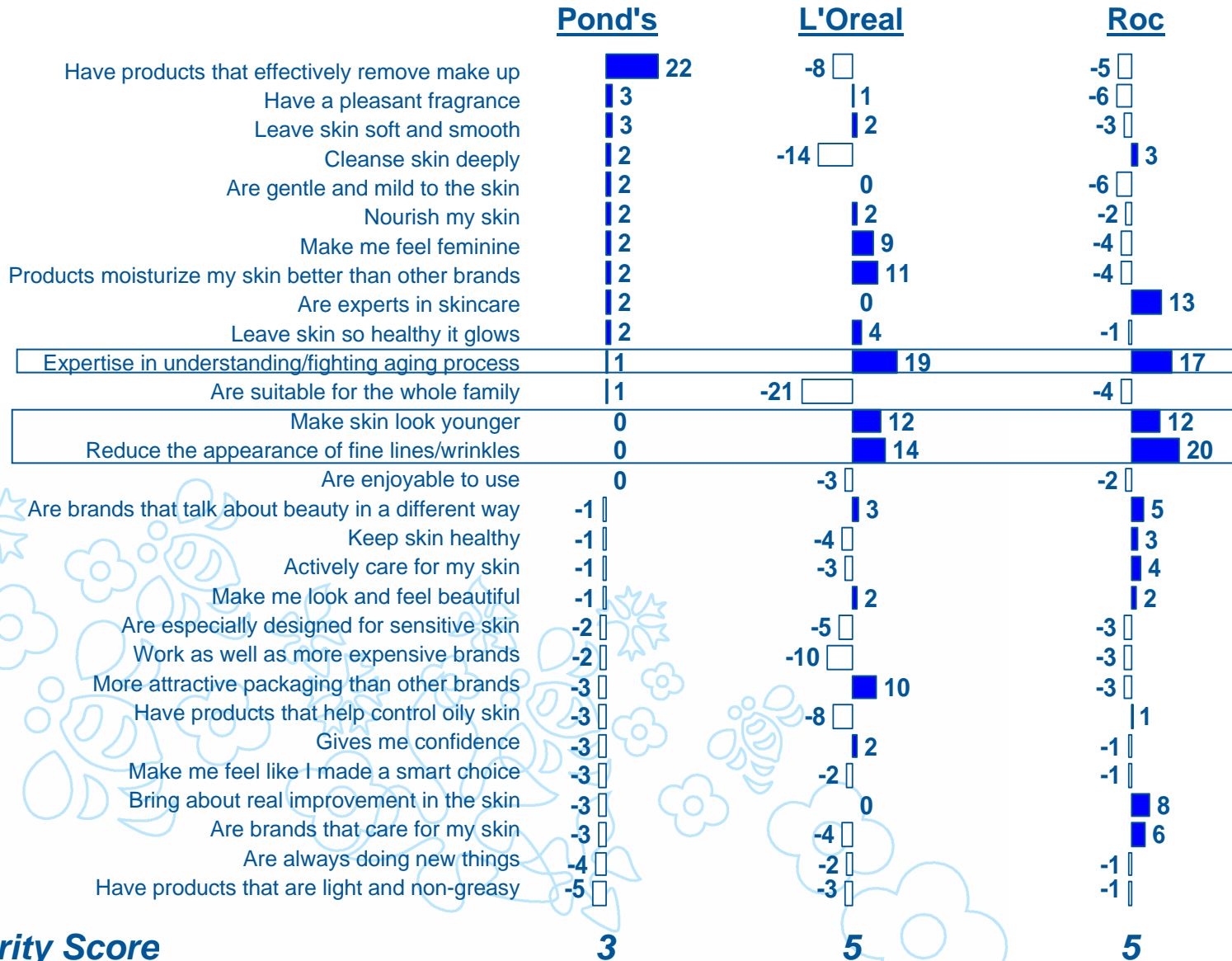
Olay

Neutrogena

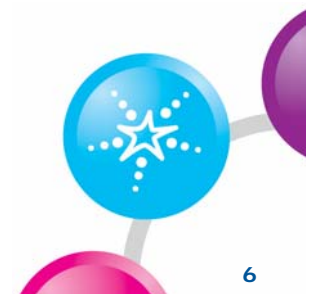


Brand Clarity

L'Oreal and Roc are primarily seen to own the anti-aging platform



Note: Avon imagery data not available.



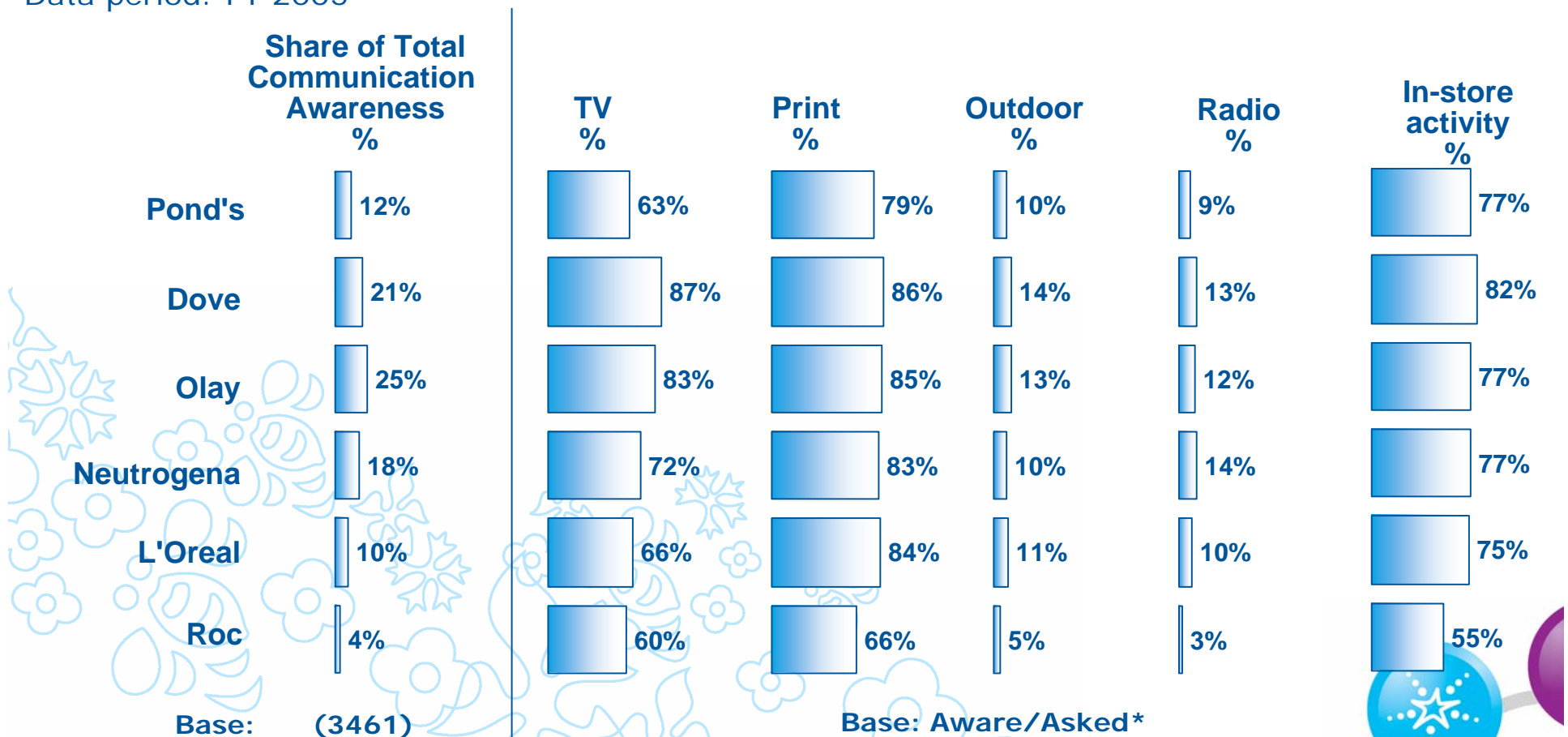
Brand Share of Total Communication



Awareness vs. Competitors

Media awareness for Pond's is strongly driven by Print, with TV being a secondary role, unlike any other brand except L'Oreal. In-store activity is an important awareness generating medium in this category.

Data period: FY 2005

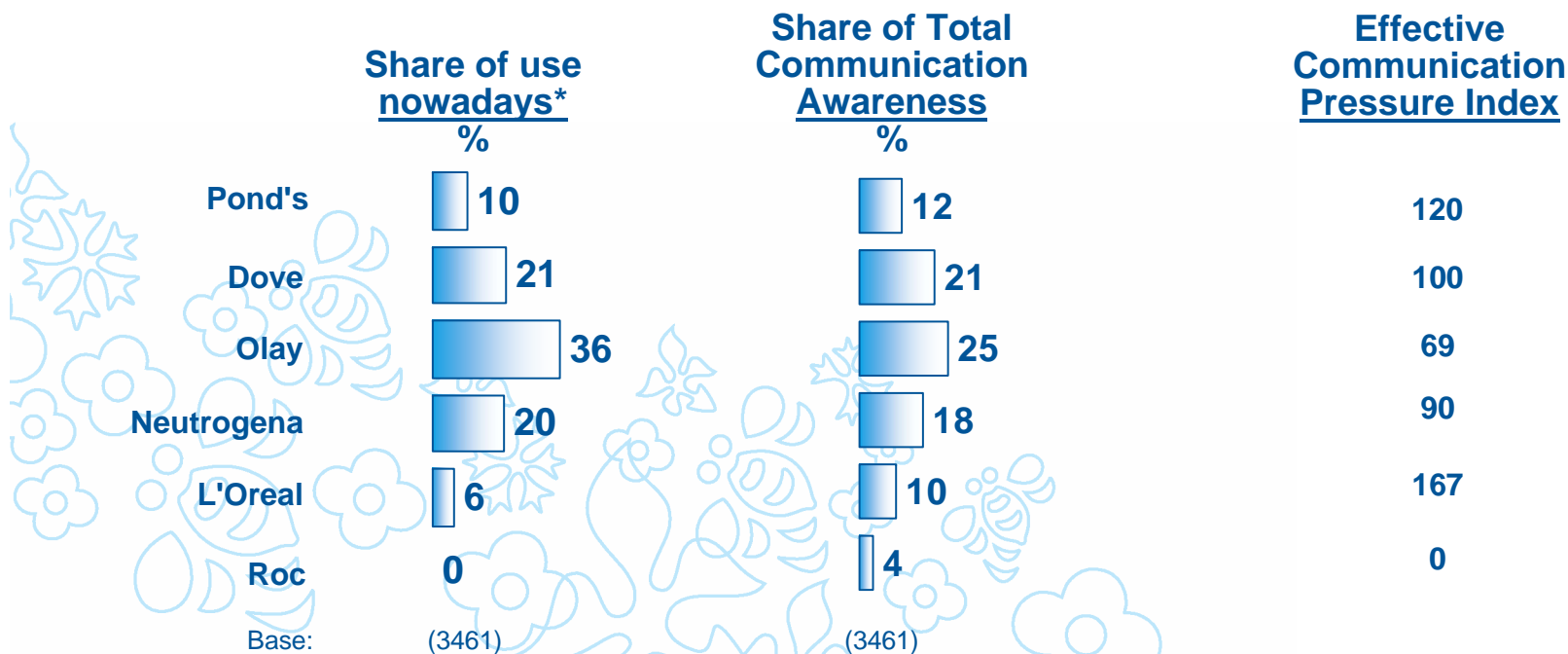


*Note: Awareness by media is based on consumers aware of total communication for that brand
 Note: Non-TV communication awareness data not available for Avon

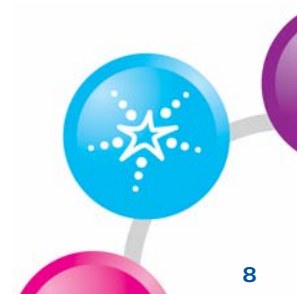
SOV/SOM ratios & Communication pressure



Spend Efficiency (category)	Share of Spend	Share of Market	SOV/SOM Ratios	
			2005	2004
Brand A				
Brand B				
Brand C				



***Note:**
 Past 4 weeks usage data is used for 'Share of use nowadays'
 Past 4 weeks usage data not available for Avon

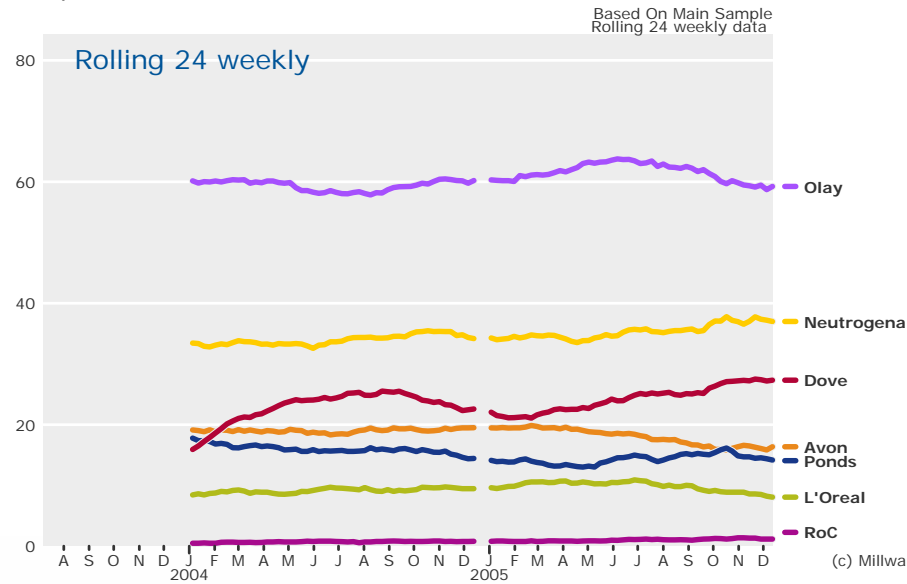


Brand Saliency

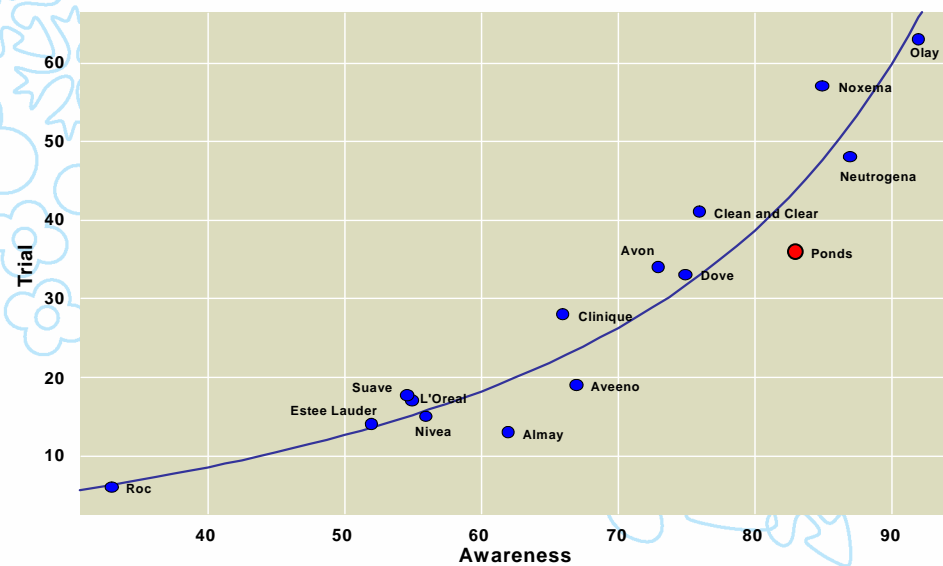
Pond's unaided awareness has picked up a little in Q4 2005, stopping a declining trend.

Pond's' ability to convert from awareness to trial and trial to regular usage can be enhanced to bring it in line with expectation

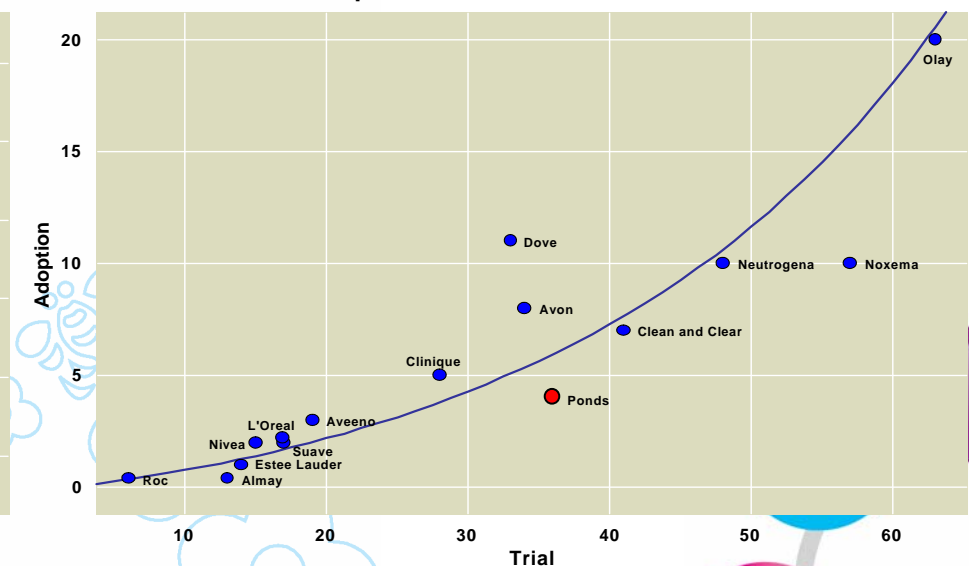
Spontaneous Awareness



Conversion To Trial



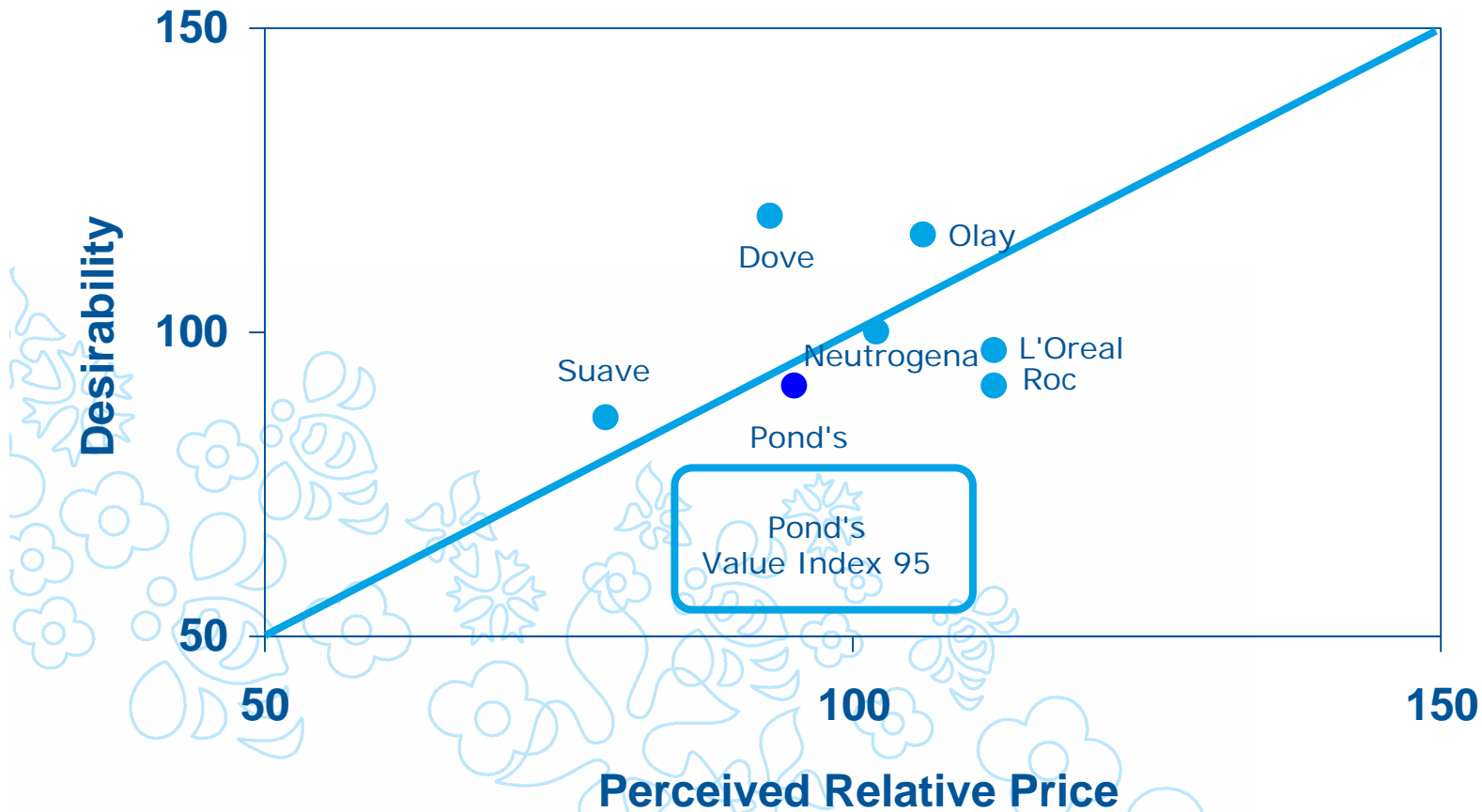
Conversion To Adoption



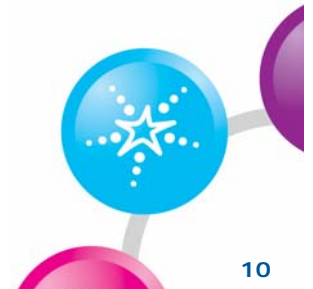
*Note: Used most often Past 3 months data is used for 'adoption'

Consumer Value Index

Data period: 2005

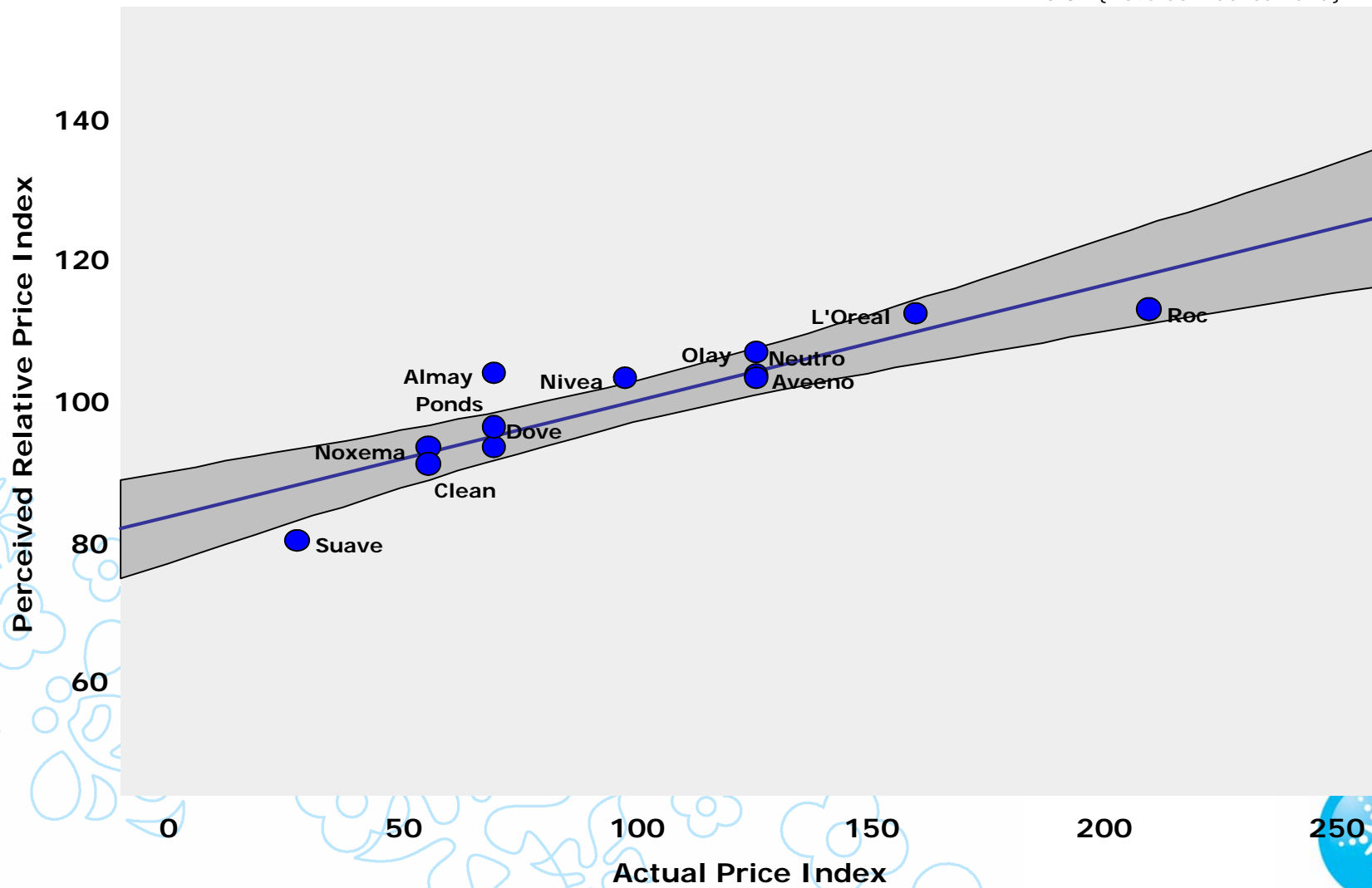


Note: Aveeno, Nivea, Noxema, Clinique, Clean and Clear, Estee Lauder, Avon, and Almay not asked in imagery so they are not involved in the calculation of the indexes



Perceived Price vs. Actual Price

$r = 0.89$ {95% Confidence Band}



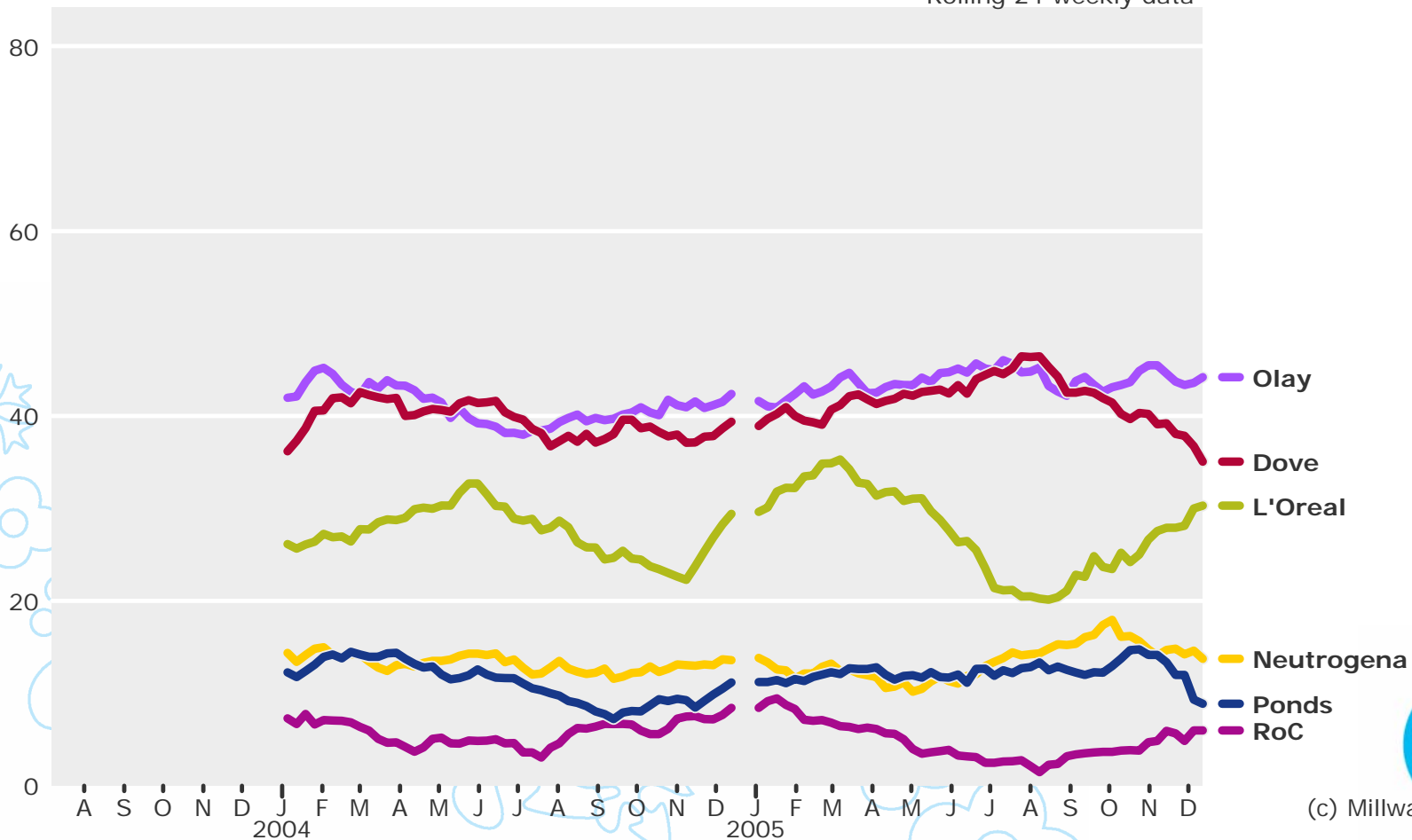
Tracking packaging Attributes vs. Competition

Pond's packaging is not seen to be very attractive. Olay & Dove are the clear leaders in this area.

'Has more attractive packaging than other brands'

Package Attractiveness

Based On Main Sample
Rolling 24 weekly data



(c) Millward Brown Inc.
Facial AUD01