2005 Pond's Brand Audit (Face Care)













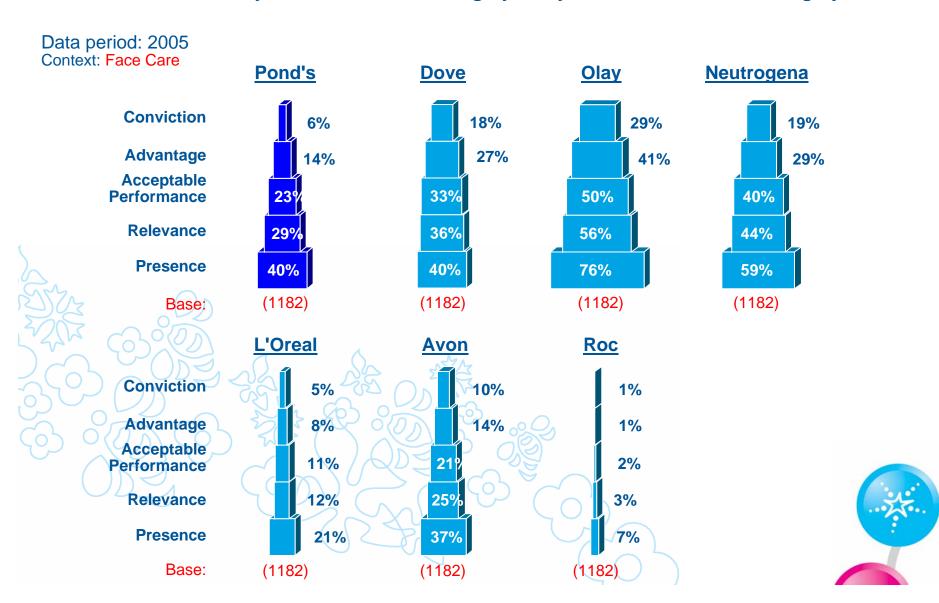


Brand Health Pyramids:

Pond's vs. competitors



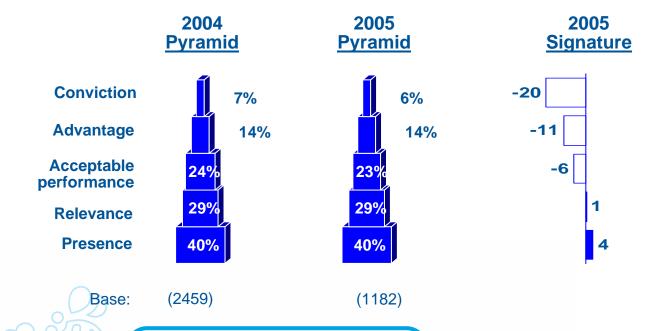
MillwardBrown



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

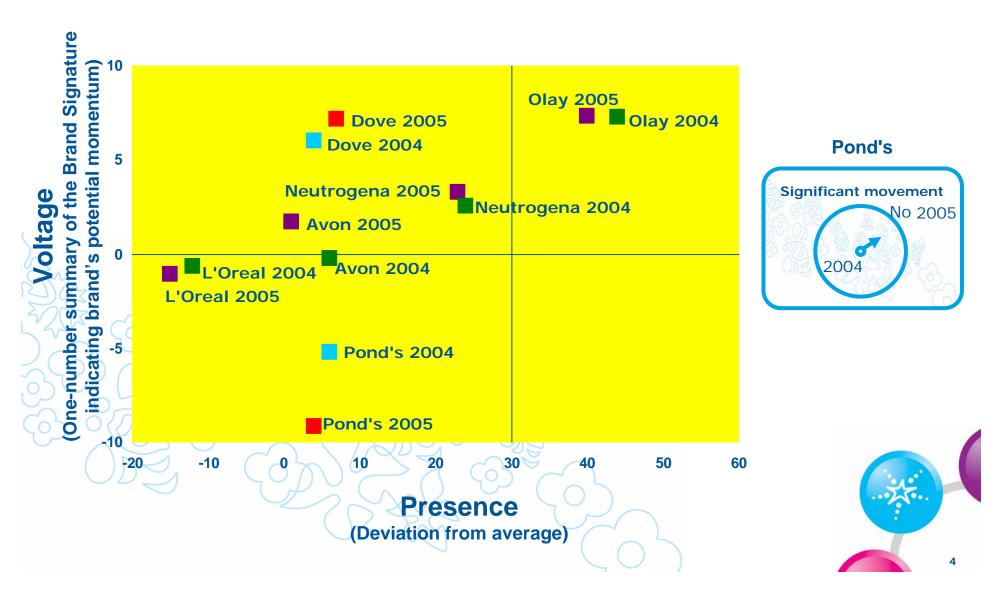


Brand Equity strength over time



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

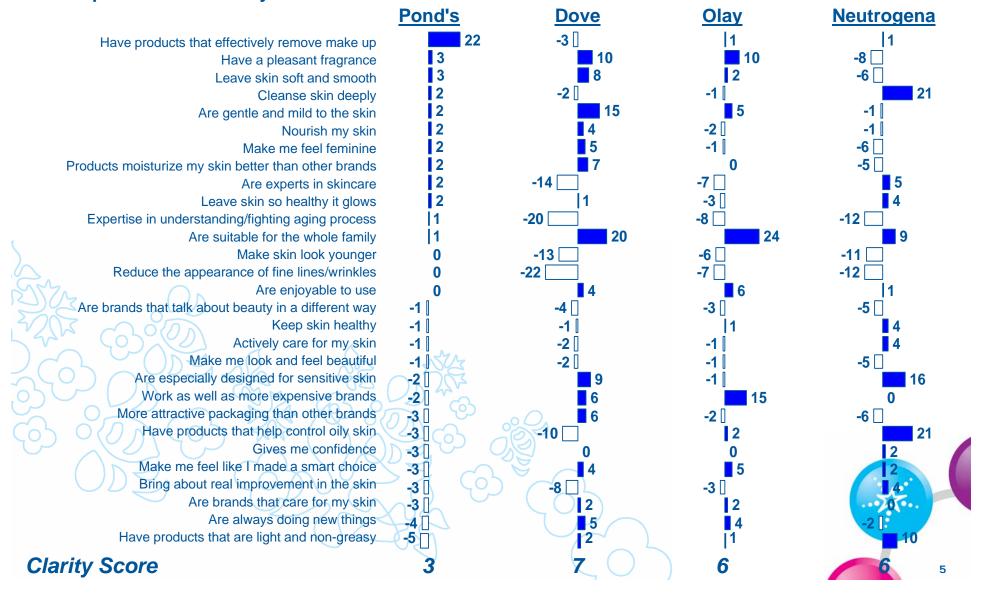


Brand Clarity



Data period: FY 2005 Face Care: BHC

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.



Brand Clarity



Data period: FY 2005 Context: Face Care : BHC

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

2 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -				
	Pond's	L'Oreal	Roc	
Have products that effectively remove make up	22	-8	-5 🗌	
Have a pleasant fragrance	3	<u> </u>	-6 \Box	
Leave skin soft and smooth	3	2	-3 []	
Cleanse skin deeply	2	-14 🔲	3	
Are gentle and mild to the skin	2	0	-6 🗌	
Nourish my skin	2	12	-2 []	
Make me feel feminine	2	9	-4 ∏	
Products moisturize my skin better than other brands	2	11	-4 🗍	
Are experts in skincare	2	0	13	
Leave skin so healthy it glows	2	4	-1	
Expertise in understanding/fighting aging process	11	19	17	
Are suitable for the whole family	1	-21	-4 []	<u> </u>
Make skin look younger	0	12	12	
Reduce the appearance of fine lines/wrinkles	0	14	20	
Are enjoyable to use	0	-3 []	-2 []	
Are brands that talk about beauty in a different way	-1 [3	5	
Keep skin healthy	-1 [-4 🗌	3	
Actively care for my skin	-1 [-3 []	4	
Make me look and feel beautiful	-1 7/2	2	2	
Are especially designed for sensitive skin	-2	-5 🗌	-3 []	Note: Avon imagery data
Work as well as more expensive brands	-2 -2	-10 🔲	-3 []	not available.
More attractive packaging than other brands	-3 [9	10	-3 🗍	
Have products that help control oily skin	3 0	-8	1	
Gives me confidence	-3		-1	
Make me feel like I made a smart choice	-3	-2.	-1	
Bring about real improvement in the skin	> -3 (0	8	
Are brands that care for my skin	-3 []	4	6	
Are always doing new things	X 4T \	-2	-1	
Have products that are light and non-greasy	-5	-3-[]	-1 j	
Clarity Cooks			_	
Clarity Score	3	5 , \(\)	5	6

Brand Share of Total Communication Milward Brown



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 **Share of Total** Communication In-store **Outdoor Awareness** TV **Print** Radio activity % % 10% 9% 77% 63% Pond's 79% 14% 13% 82% 21% 87% 86% **Dove** 25% 13% 85% 77% 83% Olay 77% 10% 18% 72% 83% Neutrogena L'Oreal 10% 11% **75%** 66% 84% 10% Roc 55% 60% 5% 66% 3% Base: Aware/Asked* (3461) Base:

*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 pressulted Brown

Spend Efficiency (category)
Share of Spend Market

Sov/Som Ratios

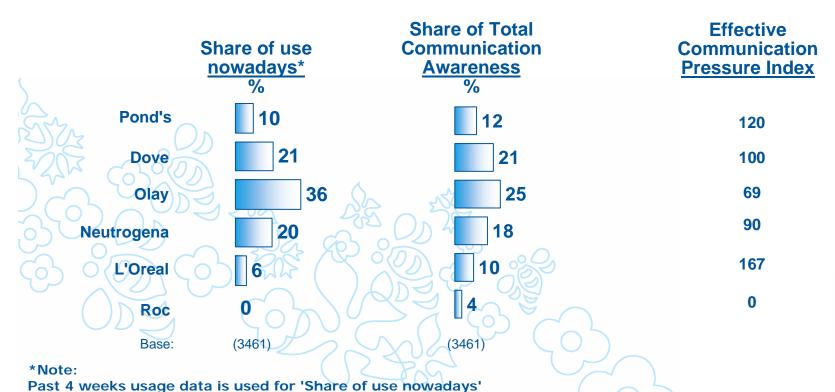
Spend Share of Market

2005 2004

Brand A

Brand B

Brand C



Past 4 weeks usage data not available for Avon

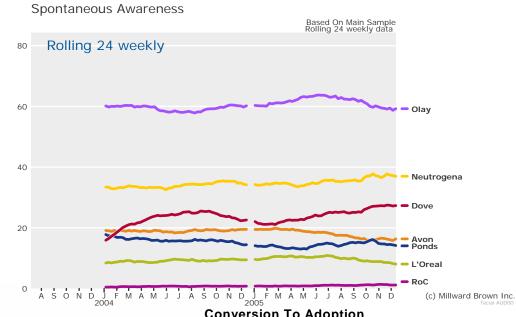


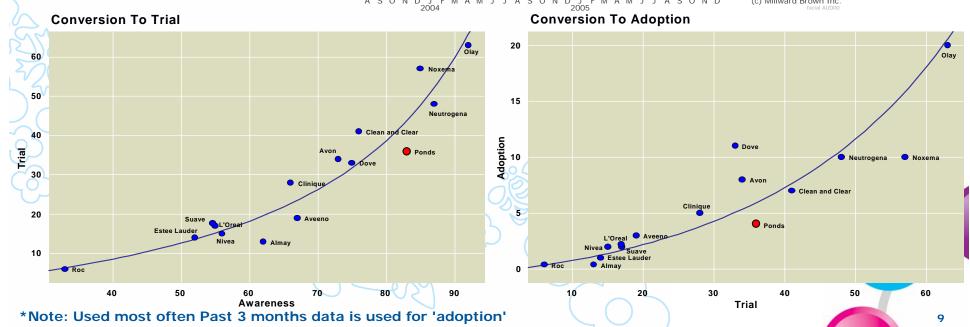


Brand Saliency

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

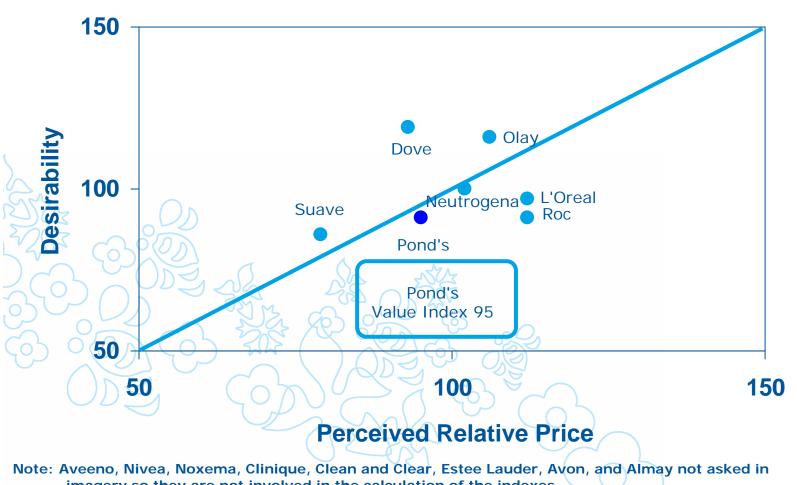




Consumer Value Index



Data period: 2005

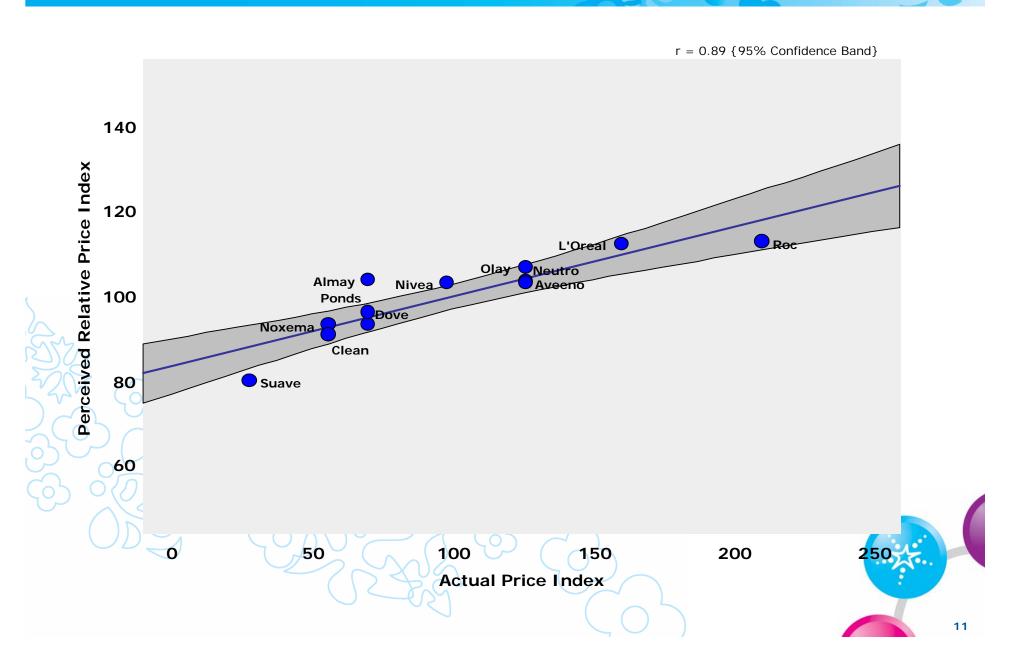


imagery so they are not involved in the calculation of the indexes



Perceived Price vs. Actual Price





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

