Johnson & Johnson

BABY PRODUCTS COMPANY

NEW BRUNSWICK, N. J.

February 22, 1977

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SUBJECT: JOHNSON'S Baby Powder
Market Facts National U/A
Adult Male Cell MRD#76-079

Mr. C. E. LaRosa

This summarizes the results of the adult male cell of the 1976 Market Facts National U/A.

BACKGROUND

A Market Facts National U/A was conducted in May/June, 1976 among adult females, female teens and adult males. The objective of the study was to obtain data on product usage and attitudes among the three demographic groups and to compare the information to the 1973 U/A.

More specifically, the Brand's objectives in the adult male cell were as follows:

1. To evaluate usage trends among adult males 18 - 49 to identify potential business building opportunities.

2. To further identify the impact of Shower to Shower growth on the JOHNSON'S Baby Powder franchise.

3. To identify product end benefits toward development of an advertising copy strategy.

4. To identify seasonal usage patterns.

METHODOLOGY

11,000 direct male questionnaires were sent out from which 7,563 were returned in the following design:

RECEIVED

FEB 25 1977

a. 3,213 adult females
b. 2,957 adult males
c. 1,395 female teens

CONCLUSIONS

1. The talcum powder category is only moderately developed among males, with 43% using talc (versus 77% for adult females). However, within this segment, 95% use a shaker top talc, of which 58% use JOHNSON'S Baby Powder most often. This low level of category usage coupled with strong Brand development suggests the viability of this segment as a business building opportunity through both category expansion and increased Brand penetration.

2. Males aged 18-34 seem to represent the greatest business building potential within the talc segment for both Brand/category development.

3. JOHNSON'S Baby Powder's primary competition within the male market is Shower to Shower and Avon. A good part of the Shower to Shower franchise is composed of previous JOHNSON'S Baby Powder users.

4. The Brand's high level of usage conversion among adult males emphasizes the Brand's business building potential via the initiation of marketing/advertising programs generated to increase trial among males.

5. The primary end benefits of JOHNSON'S Baby Powder and the powder qualities most important to male JOHNSON'S Baby Powder users include the following: a) prevents and relieves chafed/irritated skin; b) absorbs moisture/keeps you dry; and c) keeps you feeling fresh. This information coupled with qualitative insights should be used in the development of the Brand's creative strategy.

6. The female is the usual purchaser of JOHNSON'S Baby Powder, however, the male seems to present a viable business building opportunity as a purchase influencer.

7. The male's seasonal usage skew is consistent with that of the female and teen segments, i.e. peak season JOHNSON'S Baby Powder users continue product usage in the winter months, however, the frequency of use declines sharply.

INDICATED ACTION

1. To conduct an in-depth qualitative research study on the adult male to provide additional insight into the attitudes of adult males towards the usage of JOHNSON'S Baby Powder and competitive shaker top talcs.

2. To further evaluate/determine the viability of the adult male as a business building opportunity based on qualitative/quantitative U/A data; population trends, and potential incremental sales.

FINDINGS

1. Both the talcum powder and shaker top categories have directionally increased in 1976 versus 1973 (see Exhibit I).

Talcum Powder Category

Base: Total Male Respondents	1976 %	1973 %	Difference 1976 versus 1973 %
Used Talcum Powder In Past Three Months	43	41	+2
Used Shaker Top Powder In Past Three Months	41	38	+3

2. Male talcum powder users primarily use a shaker top talc.

Shaker Top Talc Category

Base: Used Talcum Powder In Past Three Months	1976 %	1973 %	Difference 1976 versus 1973 %
Use Shaker Top Talc	95	92	+3

3. JOHNSON'S Baby Powder Brand development has directionally increased versus 1973. This growth is attributed to a significant increase in JOHNSON'S Baby Powder users among males aged 18 - 34.

JOHNSON'S Baby Powder Brand Development

Base: Used Shaker Top Talcum Powder in Past Three Months	1976 Total %	1976 18-25 %	1976 26-34 %	1976 35-49 %	1976 50+ %	1973 Total %	1973 18-25 %	1973 26-34 %	1973 25-49 %	1973 50+ %
Use JBP Most Often	38	58	50	36	31	35	47	39	33	33

4. On an index basis, JOHNSON'S Baby Powder Brand development among men aged 18 - 34 is almost 40% greater than men aged 35+, which supports this demographic as being the greatest business building potential for the Brand within the male market through category expansion and simultaneous Brand development

Index - JOHNSON'S Baby Powder Brand Development*

	18 - 34	35+
JBP Used Most Often	135	81

*Based on usage versus total returns.

5. JOHNSON'S Baby Powder's primary competitors are Avon and Shower to Shower. Mennen and Old Spice are overall comparable to Shower to Shower and Avon, however, their strength is among males 35+.

Brand Used Most Often

Base: Used Shaker Top Talcum Powder in Past Three Months	Total %	18-25 %	26-34 %	35-49 %	50+ %
JOHNSON'S Baby Powder	38	58	50	36	31
Shower to Shower	11	17	12	12	9
Avon	11	11	9	11	12
Mennen	9	6	6	7	12
Old Spice	10	5	8	11	12

6. A significant portion of the Shower to Shower franchise is composed of previous JOHNSON'S Baby Powder users.

Brand Used Regularly Before Brand Now Used Most Often	Brand Used Most Often	
	StS	JBP
JOHNSON'S Baby Powder	26	5
Shower to Shower		

7. Among those who ever used JOHNSON'S Baby Powder, 54% are currently using JOHNSON'S Baby Powder most often. This level of conversion is significantly higher than both Shower to Shower and Avon.

Brand Conversion

Base: Ever Used Shaker
Top Talcum Powder

JBP	Avon	StS
54	32	34

JOHNSON'S Baby Powder trial/conversion level is stronger among adult males than adult females (54% versus 46%), which further emphasizes the male growth potential from increased trial usage.

8. The four most important product qualities of JOHNSON'S Baby Powder users listed in order of priority are as follows (see Exhibit II):

Importance of Powder Quality (Ranked #1)

A. Prevents Rash/Irritation
B. Absorbs Moisture/ Keeps ~~You~~ Dry
C. Makes You Feel Fresh
D. Relieves Rash/Irritation

9. The end benefits JOHNSON'S Baby Powder best delivers to its users, in order of importance, are as follows (see Exhibit II):

Rating of JBP (Excellent - Very Good)

A. Absorbs Moisture/Keeps You Dry
B. Prevents Rash/Irritation
C. Makes You Feel Fresh

JOHNSON'S Baby Powder seems to fulfill all the important powder qualities desired by males, illustrated by its high rating for all important end benefits.

10. JOHNSON'S Baby Powder is most often used after shower or bath, with a significant percentage using it for chafed/irritated skin and when warm/sticky (see Exhibit III).

Occasions When Used

Base: Used Shaker Top Talcum Powder in Past Three Months	Total %
A. After Shower	64
B. After Bath	57
C. Skin Chafed/Irritated	41
D. When Warm/Sticky	30

The occasions when used seem to result from JOHNSON'S Baby Powder's most highly rated end benefits.

Males seem to place greater emphasis on using JOHNSON'S Baby Powder for chafed/irritated skin than both adult females and female teens.

11. The adult female is the primary purchaser for JOHNSON'S Baby Powder and the category, with the male as a viable purchase influencer (see Exhibit IV for details).

Usual Purchaser

Base: Used Shaker Top Talcum Powder in Past Three Months	JBP	Category				
	Total	Total	18-24	25-34	35-49	50+
	%	%	%	%	%	%
Female Adult	82	75	83	76	76	72
Male Adult	20	27	18	23	24	32
Daughter	1	2	-	-	2	2
Son	-	1	-	-	-	1

The higher percentage of female purchasers for JOHNSON'S Baby Powder versus the category seems to be attributed to males aged 18 - 24 who are strong JOHNSON'S Baby Powder users.

12. The percentage of adult males using JOHNSON'S Baby Powder during its off season (winter) is only 5% points less than during the Brand's peak season (summer). This trend is also evident for the category (see Exhibit V).

Frequency of Usage By Season

	Spring	Summer	Fall	Winter
	%	%	%	%
JOHNSON'S Baby Powder Users	97	98	95	93
Category	96	97	95	92

13. On an index basis, JOHNSON'S Baby Powder and category use frequency (once a day or more) is significantly higher in the summer versus winter months (see Exhibit V for details).

Index of Change In Use Frequency
(Once a Day Or More)

	Spring	Summer	Winter	Fall	Average*
JOHNSON'S Baby Powder	100	127	86	90	100
Category	102	126	83	89	100

*Base

This seasonal skew is consistent with both the adult female and teen segments.

Let me know if you have any questions or need additional information.

Lauren

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jc

attachments

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