

Johnson & Johnson

BABY PRODUCTS COMPANY

NEW BRUNSWICK, N. J.

January 28, 1977

SUBJECT: Market Facts National U/A
Adult Female Cell Revision #1

Mr. C. E. LaRosa

This summarizes the adult female segment of the Market Facts National U/A.

BACKGROUND

A Market Facts National U/A was conducted among adult females, female teens and adult males in May, 1976.

The objectives of the adult female study were as follows:

1. To evaluate usage trends among the adult females 18 - 49 to identify possible business building opportunities.
2. To confirm the functional end benefits promised in the Brand's adult female creative strategy.
3. To further identify the impact of StS growth on the JOHNSON'S Baby Powder franchise.
4. To identify seasonal usage patterns to help build business in the aseasonal periods.
5. To evaluate adult female 50+ usage trends to identify a potential business building opportunity.
6. To evaluate toddler usage trends to evaluate its potential as a business building opportunity.

METHODOLOGY

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

- a. 3,213 adult females
- b. 2,957 males
- c. 1,393 teens

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JAMES A. MARSHALL

CONCLUSIONS

1. The JOHNSON'S Baby Powder franchise is developed to a 37% penetration level among adult female shaker top users. This usage share suggests an opportunity to further increase Brand development among this segment.
2. The Brand's high level of trial/conversion among adult females suggests the Brand initiate marketing/advertising programs to gain trial among women 18 - 49.
3. The adverse talc publicity of 1975 and 1976 may have changed heavy talcum powder usage patterns as evidenced by a decline in frequency of use for 1976 versus 1973.
4. The major physical attributes of Brand and category users, i.e. fresh/clean feeling and soft/smooth skin seem to confirm the end benefits promised in the Brand's current creative strategy.
5. The growth of StS for 1976 versus 1973 appears to have negatively impacted the JOHNSON'S Baby Powder franchise. This is evidenced by 29% of the current StS users previously used JOHNSON'S Baby Powder.
6. Seasonal usage trends seem to indicate increased consumption in the aseasonal months may be a viable business building opportunity for the Brand. Peak season JOHNSON'S Baby Powder users continue product usage in the winter months, however, frequency of use on an index basis declines almost 50%.
7. The 50+ demographic seems to represent a viable business building opportunity for the Brand. This is supported by a well developed shaker top category and increased JOHNSON'S Baby Powder penetration versus 1973.
8. The toddler segment may represent a business building opportunity, as evidenced by usage declines after infant years (two years old).
9. The adult female continues to be the primary JOHNSON'S Baby Powder purchaser which confirms the Brand's support of the adult female strategy. This data is consistent with 1973.
10. The larger sized products seem to generate increased consumption versus the smaller sizes, which supports the Brand's promotional emphasis on the 14 and 24 ounce size. This apparently stems from extended family usage and the psychological desire to use more from the larger sized container.
11. The JOHNSON'S Baby Powder occasions of use are primarily after bath or shower and on the torso/chest. This is consistent with 1973 data and supports the Brand's visualization of these occasions in copy executions.

INDICATED ACTIONS

1. To test the viability of increased year round media spending behind the adult female 18 - 49.
2. To test and nationally execute advertising and promotional programs to help build trial among women 18 - 49.
3. To develop and test a national campaign to increase use frequency to the once a day or higher level.
4. To continue to monitor/enforce the agreed to StS price premium and carefully scrutinize/react to consumer and trade promotions which may infringe on the JOHNSON'S Baby Powder franchise.
5. To develop/implement a media spending test against women aged 50+.
6. To investigate the business building potential of spending tests against the toddler segment.

FINDINGS

1. The talcum powder category has directionally declined in 1976 versus 1973. 77% versus 79% of all adult females use talcum powder (see Exhibit I).

Talcum Powder Category

<u>Base:</u> Total Female Respondents	<u>1976 Total</u> %	<u>1973 Total</u> %	<u>Difference</u> '76 vs. '73 %
Used Talcum Powder in Past 3 Months	77	79	(2)

2. In 1976, 85% of all females using talcum powder used a shaker top talc, which is at parity to 1973 (see Exhibit I).

Shaker Top Talc Category

<u>Base:</u> Used Talcum Powder in Past 3 Months	<u>1976 Total</u> %	<u>1973 Total</u> %	<u>Difference</u> '76 vs. '73 %
Total Shaker Top	85	85	-
Shaker Top Only	39	34	+5
Shaker and Duster	46	51	(5)

3. The percentage of female shaker top users who use JOHNSON'S Baby Powder most often has increased to 37% versus 35% in 1973 (see Exhibit I).

Use JOHNSON'S Baby Powder Most Often

Base: Use Shaker Top Talcum Powder In Past 3 Months	<u>Total</u>	<u>19-25</u>	<u>26-34</u>	<u>35-49</u>	<u>50+</u>
	%	%	%	%	%
1976	37	51	38	35	33
1973	35	50	41	33	30
Difference	+2	+1	+3	+2	+3

4. On an index basis, JOHNSON'S Baby Powder Brand development among women aged 19 - 25 is over 50% greater than all other age groups. This may be partially attributed to JOHNSON'S Baby Powder usage by mothers of young children.

Index - JOHNSON'S Baby Powder Brand Development*

	<u>19 - 25</u>	<u>26 - 34</u>	<u>35 - 49</u>	<u>50+</u>
JOHNSON'S Baby Powder	147	98	85	96

*Index by usage versus total returns.

5. Among those who ever used JOHNSON'S Baby Powder, 46% are currently using JOHNSON'S Baby Powder most often. This level of consumer conversion is stronger than that of both Shower to Shower and Avon (see Exhibit II).

Brand Conversion
1976

<u>JBP</u>	<u>StS</u>	<u>Avon</u>
46	27	40

6. Category and Brand use frequency of once a day or more has declined approximately 4 percentage points versus 1973. A decline is also evidenced in each season. This decline may be attributed to the adverse talc publicity in Spring, 1976 (see Exhibit III).

Frequency of Usage
(Once a Day or More)

	<u>1976</u>	<u>1973</u>	<u>Diff.</u>
Category	51	55	(4)
JOHNSON'S Baby Powder	55	59	(4)

7. The four most important product qualities of JOHNSON'S Baby Powder users listed in order of priority are the following: (See Exhibit IV)

Importance of Powder Quality (ranked #1)

- A. Absorb moisture/keep you dry
- B. Making you feel fresh
- C. Prevent rash and irritation
- D. Making skin feel soft/smooth

The attributes fresh/clean were combined in the 1973 survey and ranked #1. When detached for the 1976 study, "makes you feel clean" was not a significant product quality or end benefit.

8. The end benefits JOHNSON'S Baby Powder best delivers to current users, listed in order of importance, are as follows: (See Exhibit IV)

Rating of JOHNSON'S Baby Powder - (excellent/very good)

- A. Makes you feel fresh
- B. Having a pleasant scent
- C. Making your skin feel soft/smooth
- D. Absorbing moisture/keeping you dry

JOHNSON'S Baby Powder is rated at parity or higher than all other powders on all end benefits.

9. The Shower to Shower franchise has cannibalized a significant percentage (29) of the JOHNSON'S Baby Powder franchise.

Brand used regularly
before Brand now used
most often.

JBP
StS

<u>Brand Used Most Often</u>	
<u>StS</u>	<u>JBP</u>
29	7

10. The Shower to Shower franchise reflects the strongest growth within the shaker top powder category by more than doubling its 1973 share (see Exhibit II).

<u>Base: Used Shaker Top Talc in Past 3 Months</u>	<u>Brand Used Most Often</u>		
	<u>1976</u>	<u>1973</u>	<u>Diff.</u>
JBP	37	35	+2
StS	10	4	+6
Avon	26	28	(2)

11. The percentage of adult females using JOHNSON'S Baby Powder during its off season (winter) has increased to 96% which is only 2% points less than during the Brand's peak season (summer) (see Exhibit III for details).

	Spring			Summer			Fall			Winter		
	1976	1973	Diff.	1976	1973	Diff.	1976	1973	Diff.	1976	1973	Diff.
JBP	98	96	+2	98	99	(1)	97	94	+3	96	91	+5

12. The sharply skewed seasonal increase in frequent use (more than once a day) for the summer months is reflected in the 1973 and 1976 surveys. On an index basis for 1976, JOHNSON'S Baby Powder use frequency is 47% points higher for the summer versus winter months (see Exhibit VIII).

	Index of Change in Frequency In Use - Once a Day or More											
	Winter			Spring			Summer			Fall		
	1976	1973	Diff.	1976	1973	Diff.	1976	1973	Diff.	1976	1973	Diff.
Total talc powder users	100	100	N/A	120	117	+3	152	145	+7	105	105	-
JBP users	100	100	N/A	119	116	+3	147	150	(3)	104	104	-

The trend for younger women to have more frequent seasonal JOHNSON'S Baby Powder and category usage than older women is evidenced in the 1973 and 1976 surveys (see Exhibit III).

13. The JOHNSON'S Baby Powder Brand development within the 50+ demographic has increased versus 1973.

Brand Development - Females 50+			
Base: Total 50+ who used talcum powder in past 3 months	1976	1973	Difference
	1,359	996	
	%	%	
Use shaker top talc	86	85	+1
JBP used most often	33	30	+3
Brand will buy next time	32	29	+3

14. JOHNSON'S Baby Powder usage on children sharply declines after age two and does not begin to stabilize/regain growth until teen years. This decline is consistent with all other baby powder brands.

Baby Powder Users - Index*

	<u>JBP</u>	<u>A.O.</u>
2 and under	253	86
3 - 5 years	168	134
6 - 12 years	91	206

*Index by usage and age versus total returns.

15. The adult female is most likely to purchase JOHNSON'S Baby Powder herself at a level consistent with 1973 (see Exhibit II).

Purchaser

	<u>1976</u>	<u>1973</u>
Female	92%	92%

16. The JOHNSON'S Baby Powder purchase cycle (once a month) is consistent among the 9 ounce, 14 ounce, and 24 ounce size for JOHNSON'S Baby Powder and Shower to Shower (8 ounce and 13 ounce). This seems to stem from extended family usage and/or increased frequency of usage with the larger sized products.

Purchase Cycle

	<u>JOHNSON'S Baby Powder</u>			<u>Shower to Shower</u>	
	<u>9 oz.</u>	<u>14 oz.</u>	<u>24 oz.</u>	<u>8 oz.</u>	<u>13 oz.</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Once a month	19	17	17	18	16

17. The 1976 study reflected JOHNSON'S Baby Powder users as being more apt to use perfume/cologne/toilet water than all other powder users. This may account for the high percentage of JOHNSON'S Baby Powder users rating its end benefit of having a pleasant scent as excellent/very good. (see Finding

	<u>Index of Perfume/Cologne Users</u>	
<u>Base: Total</u>	<u>JBP Users</u>	<u>A.O. Users</u>
<u>Respondents</u>	<u>1,699</u>	<u>407</u>
	<u>%</u>	<u>%</u>
Use perfume	105	91
Use cologne	104	94
Use toilet water	121	90
Use any of above	101	97

18. JOHNSON'S Baby Powder primary "usage areas" and "occasions when used" remained consistent with 1973 (see Exhibit V).

<u>Occasions when used</u>	<u>Total</u>		<u>Difference</u>
	<u>1976</u>	<u>1973</u>	
1. After bath	67	68	(1)
2. After shower	57	55	+2
3. When warm/sticky	35	42	(7)

Usage areas

1. In bathroom only	85	79	+6
2. In bedroom	19	11	+8

19. Specific parts of the body receive more powder usage than does the entire body. The torso/chest seems to be the prime area of powder application rather than the underarms as projected in 1973, which may stem from our current advertising campaign which visually communicates torso/chest powder application (see Exhibit VI).

Body Areas of Usage

	<u>1976</u>	<u>1973</u>
Entire Body	30	31
Certain Parts	69	69
Torso/Chest	61	17
Underarms	58	30

Lauren

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jc

attachments

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