

KEY TAKEAWAYS:

18-34 YEAR-OLDS ARE MORE LIKELY THAN 35+ YEAR-OLDS TO CARE ABOUT THE BRAND BEING NATURAL/ORGANIC AND ENVIRONMENTALLY FRIENDLY.

18-34 YEAR-OLDS ARE ALSO MORE LIKELY TO AGREE THAT SMALLER BRANDS HAVE BEEN WINNING THEM OVER BY CATERING TO THEIR INDIVIDUAL NEEDS.

AMONG THE BROADER POPULATION, THERE CONTINUES TO BE A BELIEF THAT SMALLER/NEWER BRANDS IN THE SPACE ARE GAINING POPULARITY.

USAGE OF GILLETTE HAS BEEN ROUGHLY CONSISTENT OVER-TIME AND SENTIMENT TOWARD VALUE FOR THE PRICE HAS GENERALLY HELD UP.

THE MINORITY OF SKIN CARE PURCHASING CONSUMERS WHO AGREE THAT THEY ARE GETTING BORED OF OLAY HAS BEEN GROWING GRADUALLY.

CONSUMERS CONTINUE TO THINK SODA IS BAD FOR YOU AND ARE TRYING TO CUT BACK.

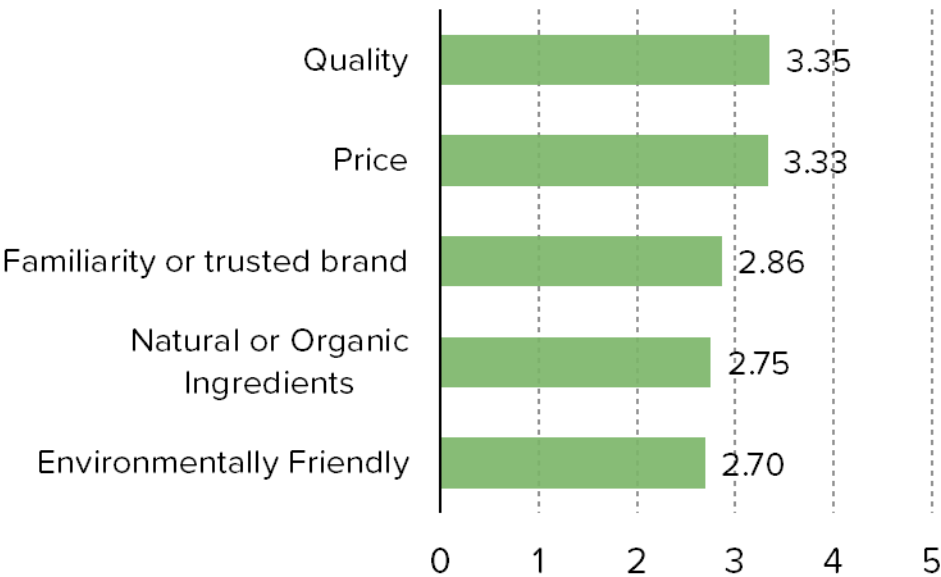
CPGS OVERALL

PLEASE RANK WHICH ARE MOST IMPORTANT TO YOU WHEN IT COMES TO PURCHASING PERSONAL CARE AND HOUSEHOLD ITEMS.

Posed to all respondents



Posed to 18-34 Year-Olds



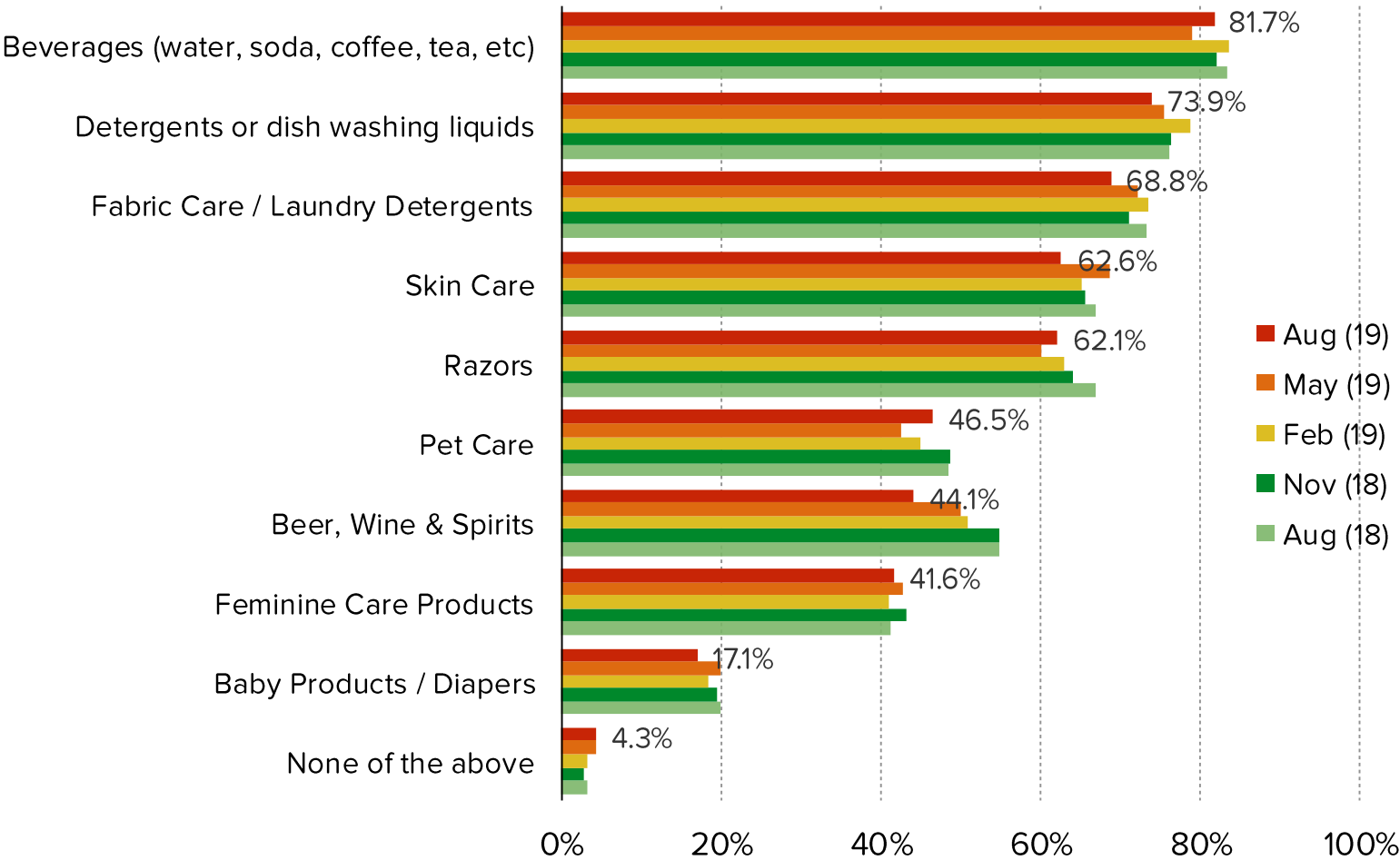
WHERE DO YOU BUY HOUSEHOLD AND PERSONAL CARE ITEMS?

Posed to all respondents



DO YOU REGULARLY OR OCCASIONALLY MAKE PURCHASE DECISIONS ON THE FOLLOWING TYPES OF ITEMS (SELECT ALL)?

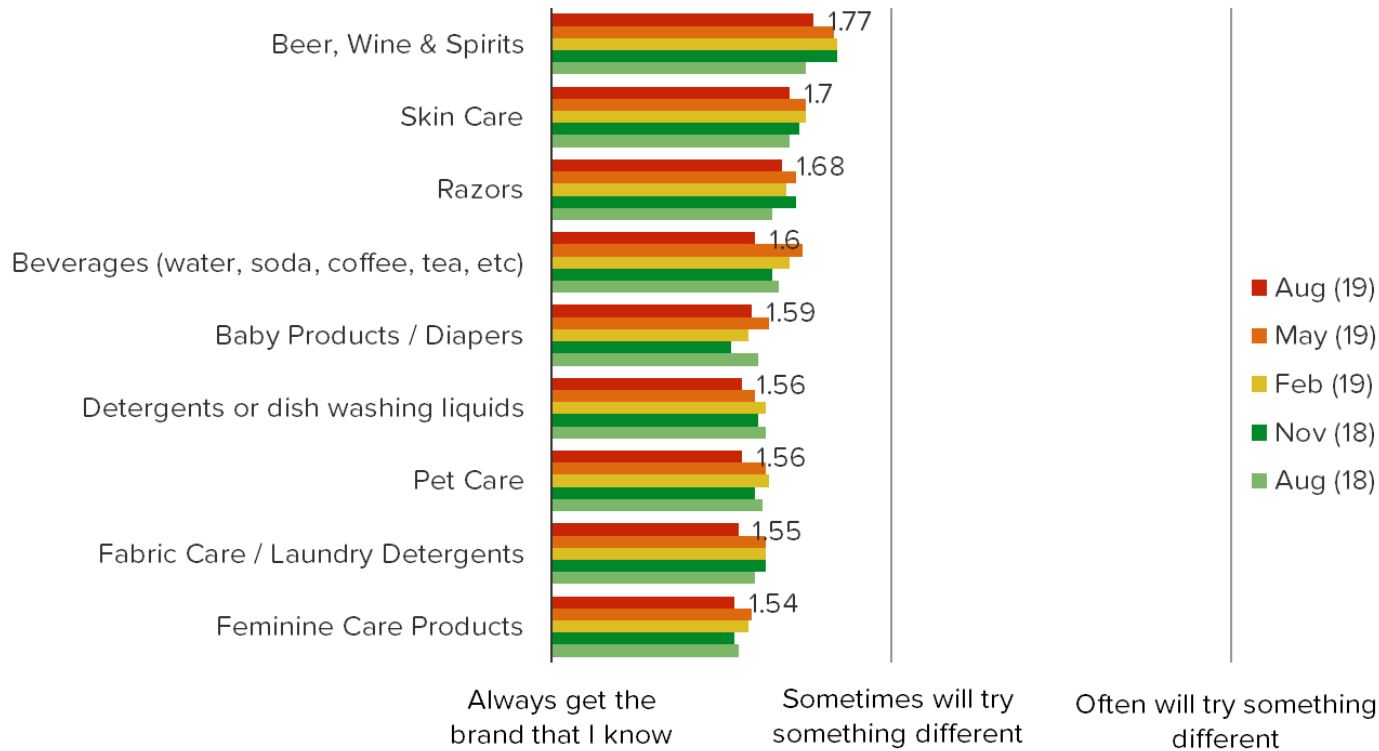
Posed to all respondents



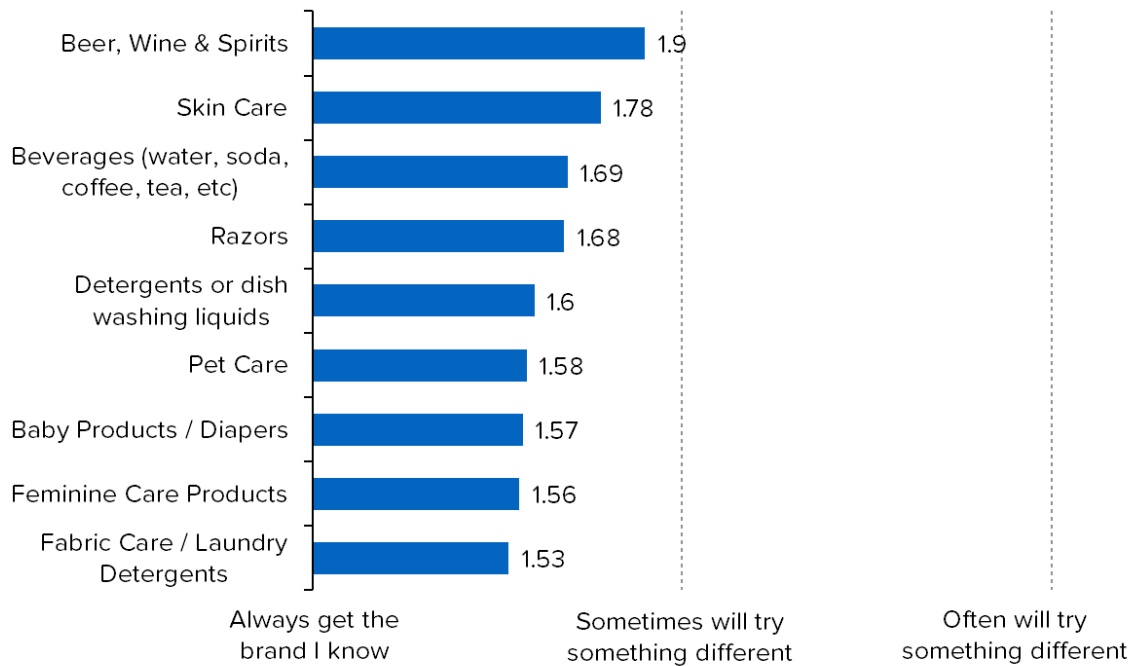
Note: On some pages throughout this report we note that this question was posed to respondents who regularly or occasionally make purchase decisions on this type of product. Those questions key off of this one above – respondents who said they make purchase decisions get piped into those questions so we make sure we are hearing from the right audience for each deep dive section.

HOW OFTEN DO YOU TRY DIFFERENT OR NEW BRANDS WHEN BUYING THESE TYPES OF ITEMS?

Posed to respondents who regularly or occasionally make purchase decisions on each.

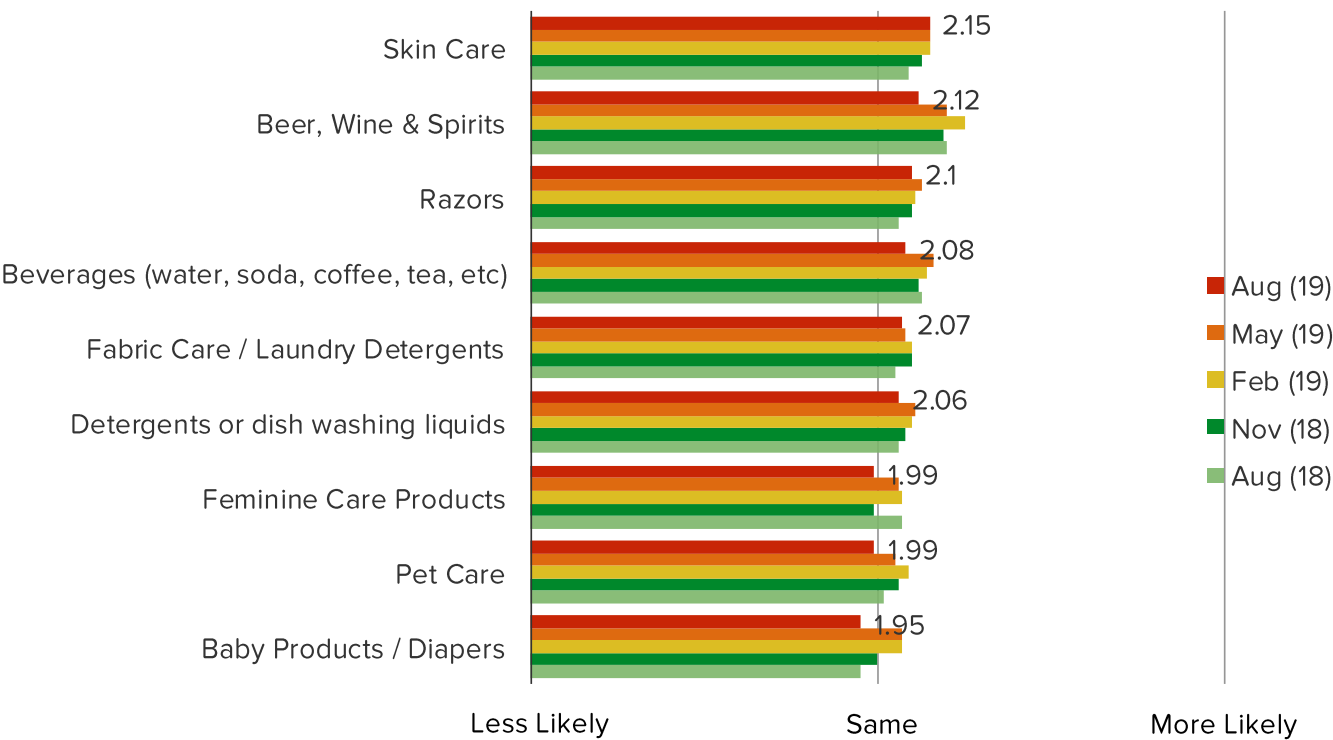


Posed to 18-34 Year-Olds



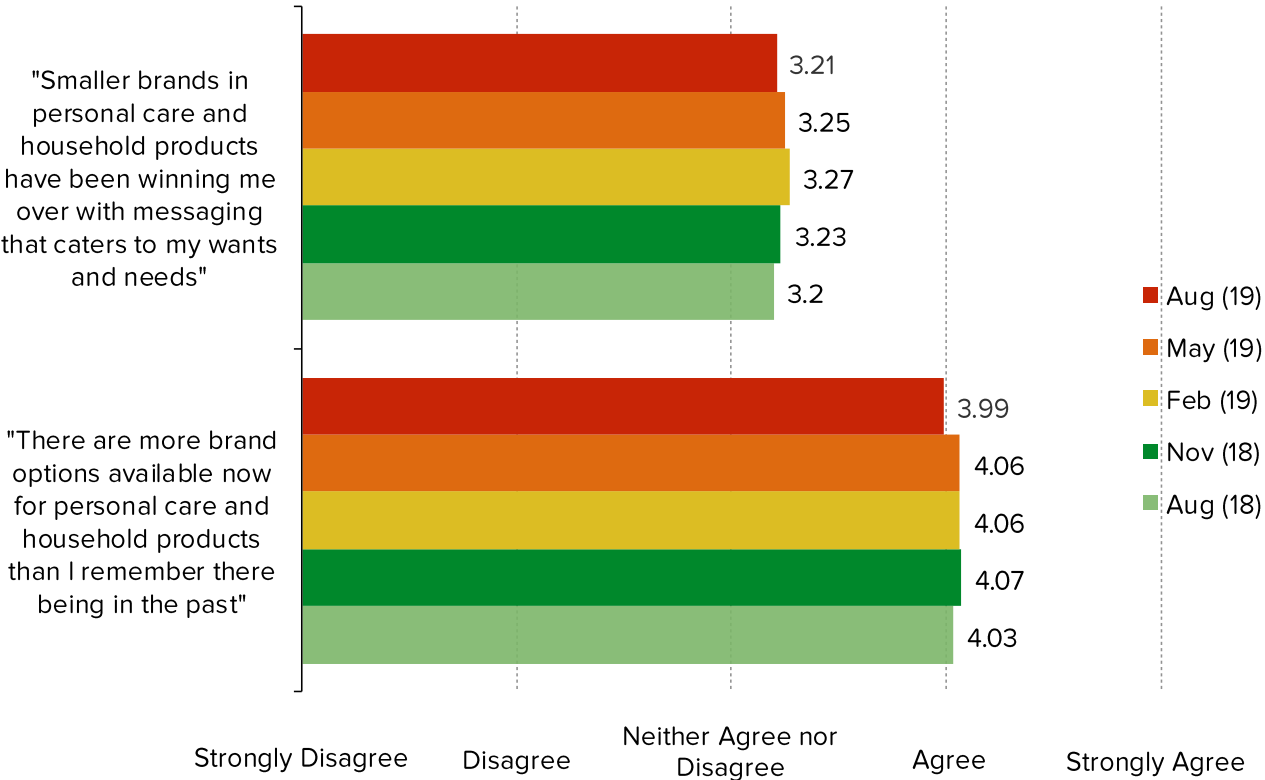
HAS YOUR DESIRE/WILLINGNESS TO TRY NEW/DIFFERENT BRANDS IN THIS CATEGORY CHANGED OVER THE PAST YEAR?

Posed to respondents who regularly or occasionally make purchase decisions on each.

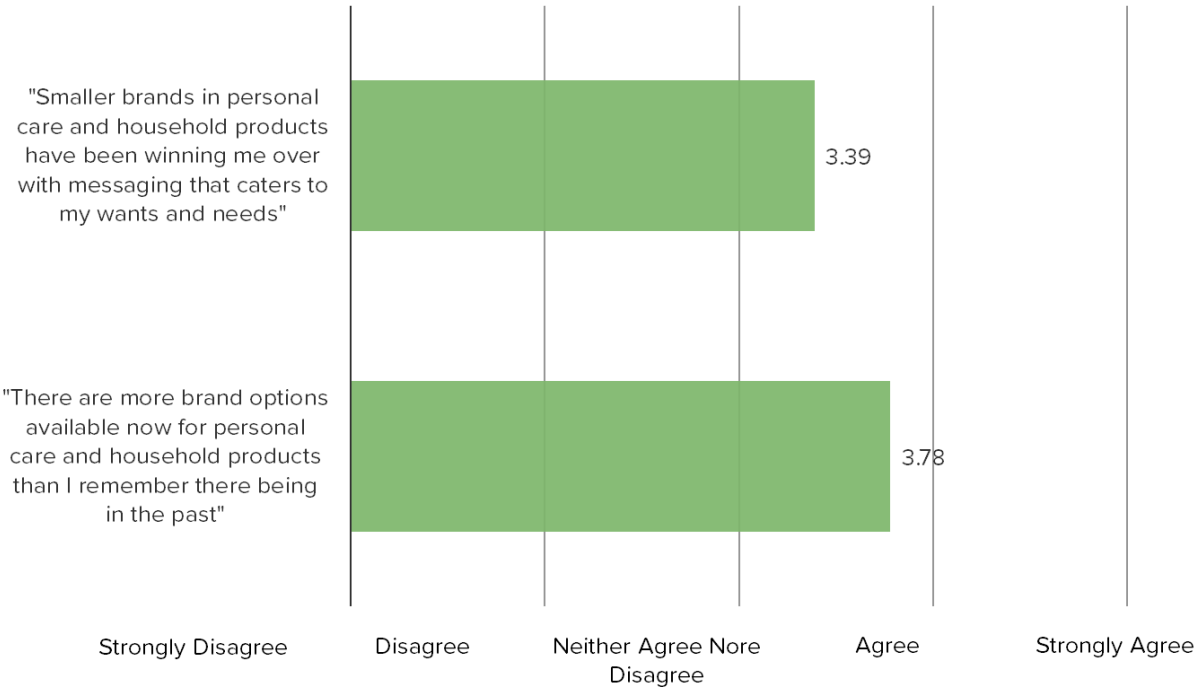


HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS?

Posed to all respondents

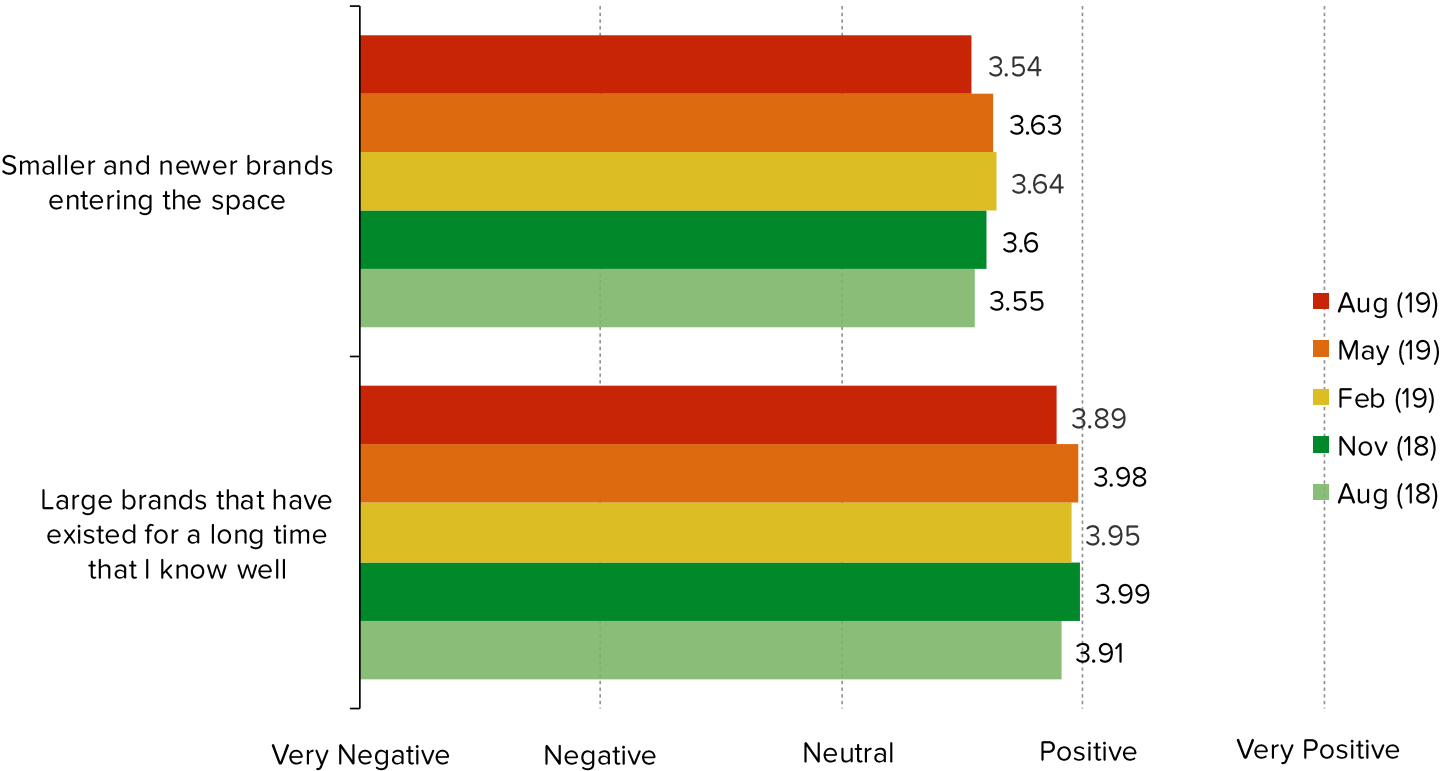


Posed to 18-34 Year-Olds

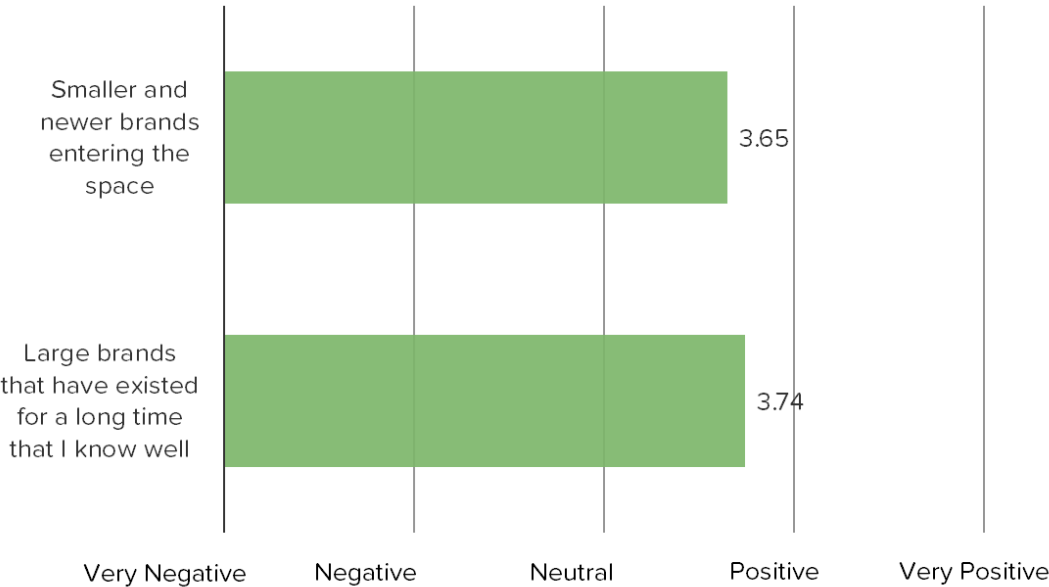


WHEN IT COMES TO HOUSEHOLD AND PERSONAL CARE PRODUCTS, WHAT IS YOUR OPINION OF THE FOLLOWING?

Posed to all respondents

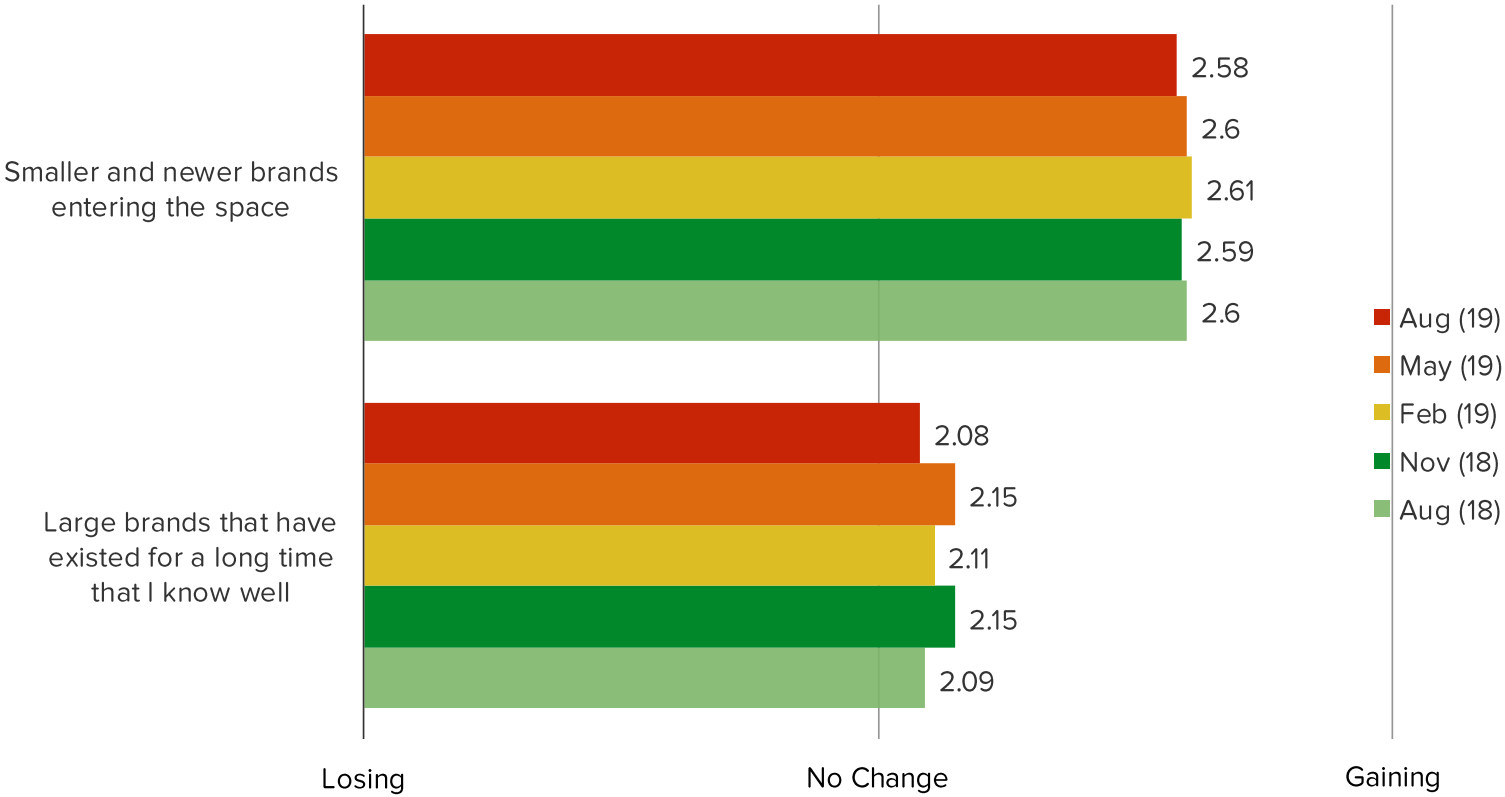


Posed to 18-34 Year-Olds



WHEN IT COMES TO HOUSEHOLD AND PERSONAL CARE PRODUCTS, DO YOU FEEL THE FOLLOWING ARE GAINING OR LOSING POPULARITY?

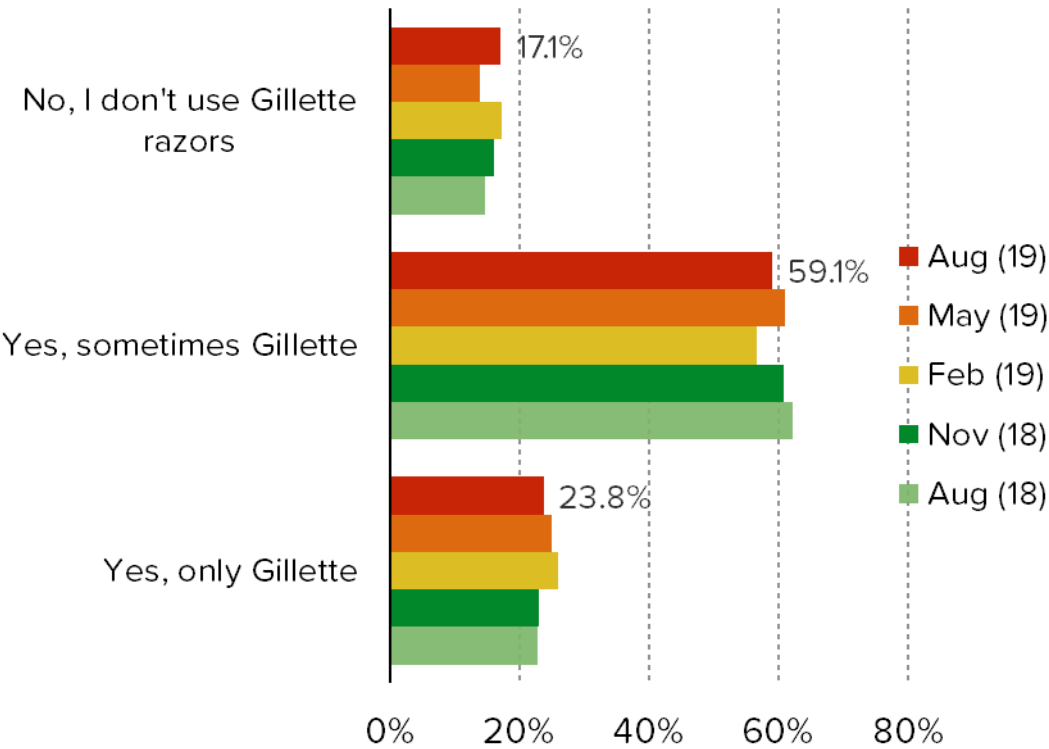
Posed to all respondents



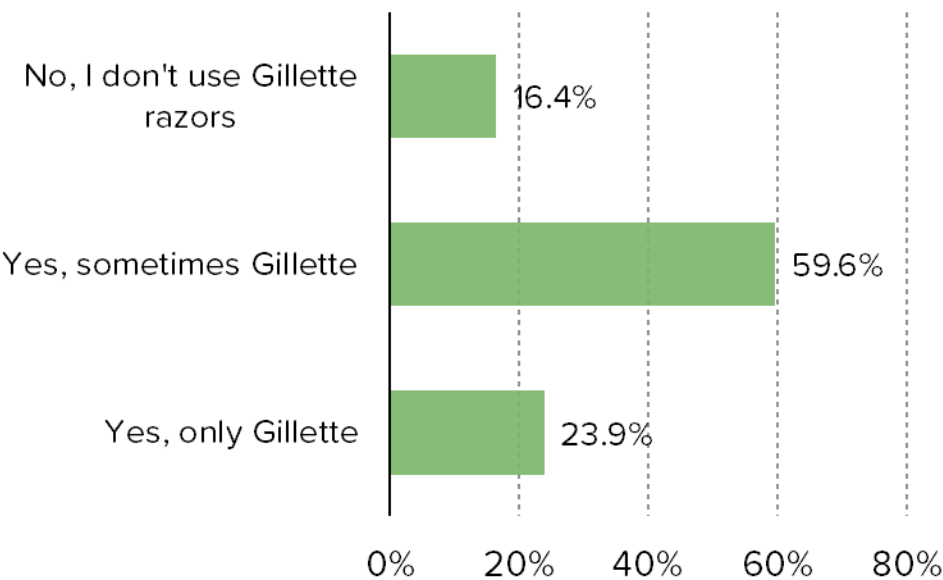
GILLETTE

DO YOU USE GILLETTE RAZORS?

Posed to respondents who make purchase decisions on razors

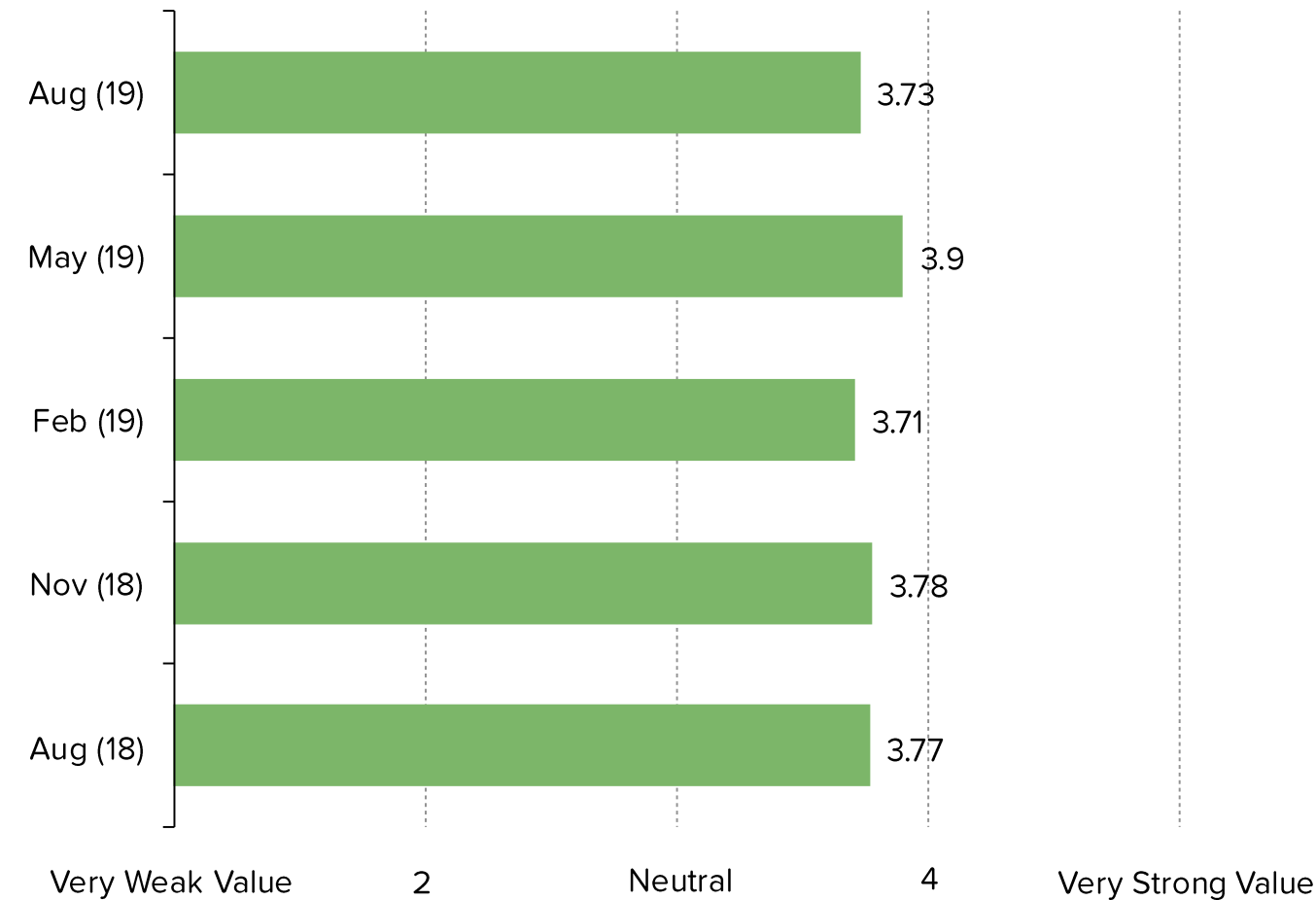


Posed to 18-34 Year-Olds



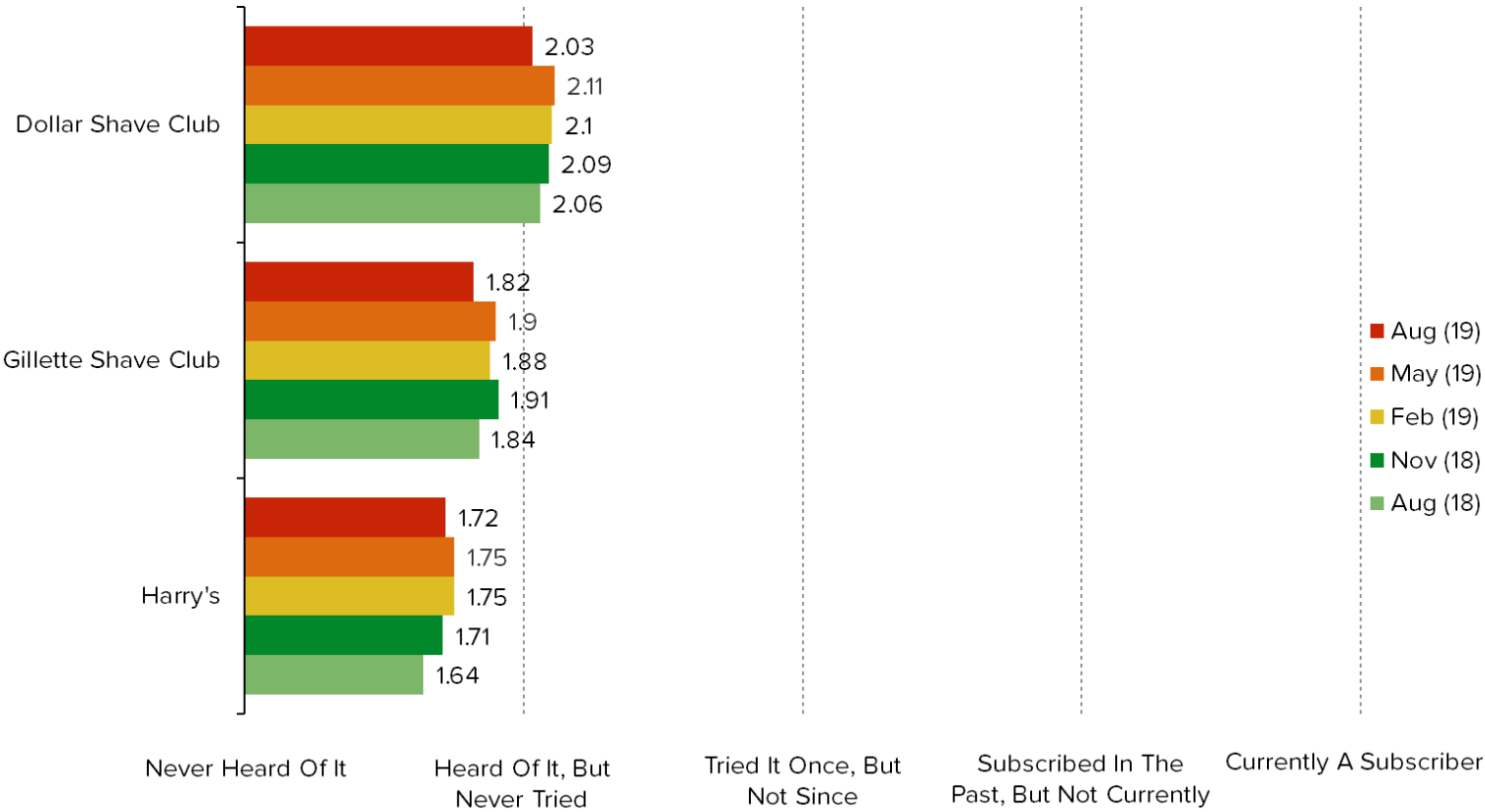
WHAT IS YOUR OPINION OF THE VALUE GILLETTE RAZORS OFFERS FOR THE PRICE?

Posed to respondents who make purchase decisions on razors



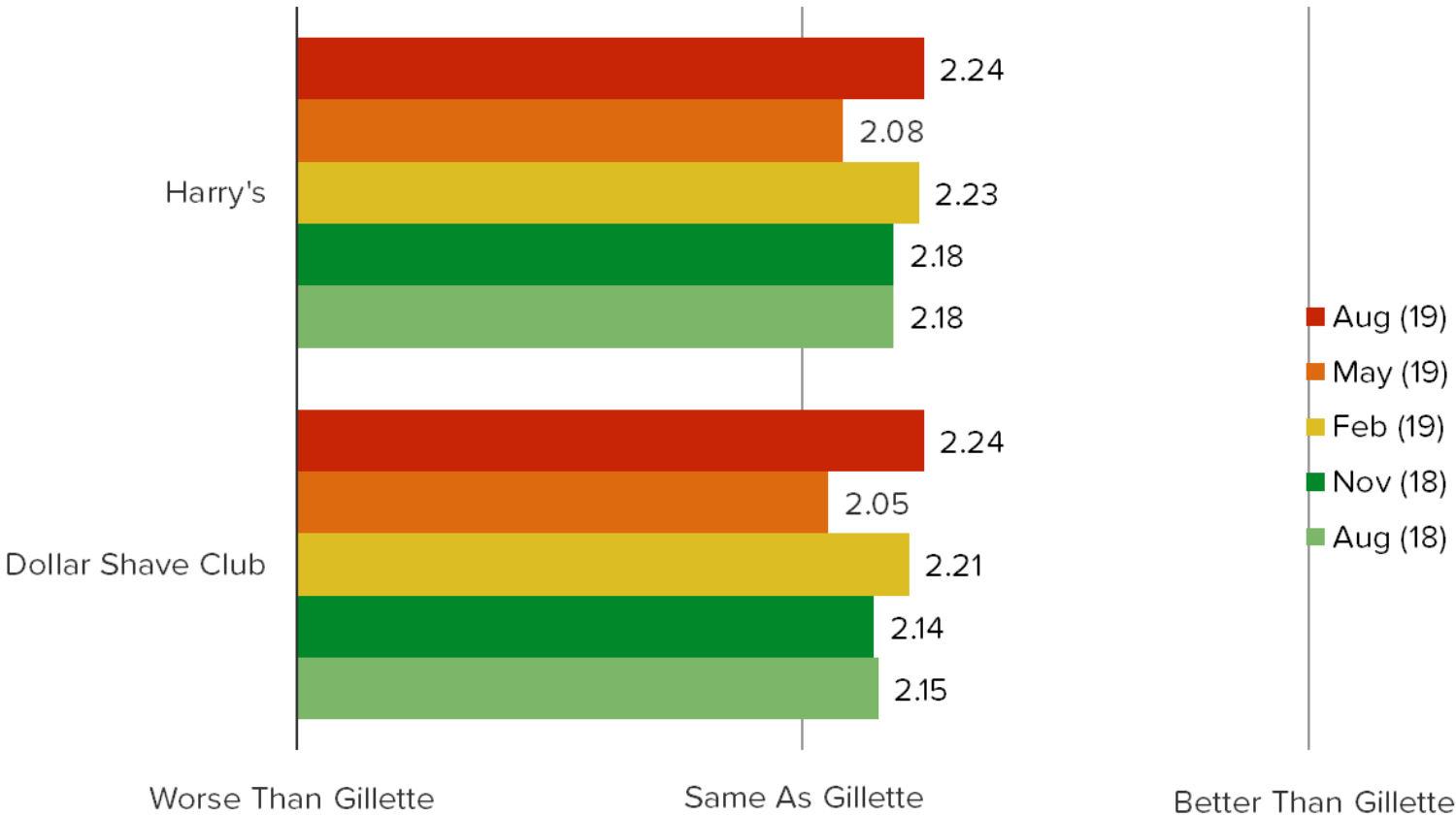
WHAT IS YOUR EXPERIENCE WITH THE FOLLOWING SHAVE CLUBS?

Posed to respondents who make purchase decisions on razors



WHAT IS YOUR OPINION OF THE FOLLOWING?

Posed to respondents who have at least tried Harry’s and/or Dollar Shave Club



Davids vs. Goliaths

WHY DO YOU USE A SHAVE CLUB LIKE THIS INSTEAD OF BUYING BRANDS LIKE GILLETTE?

Posed to shave club users who think it is better than Gillette

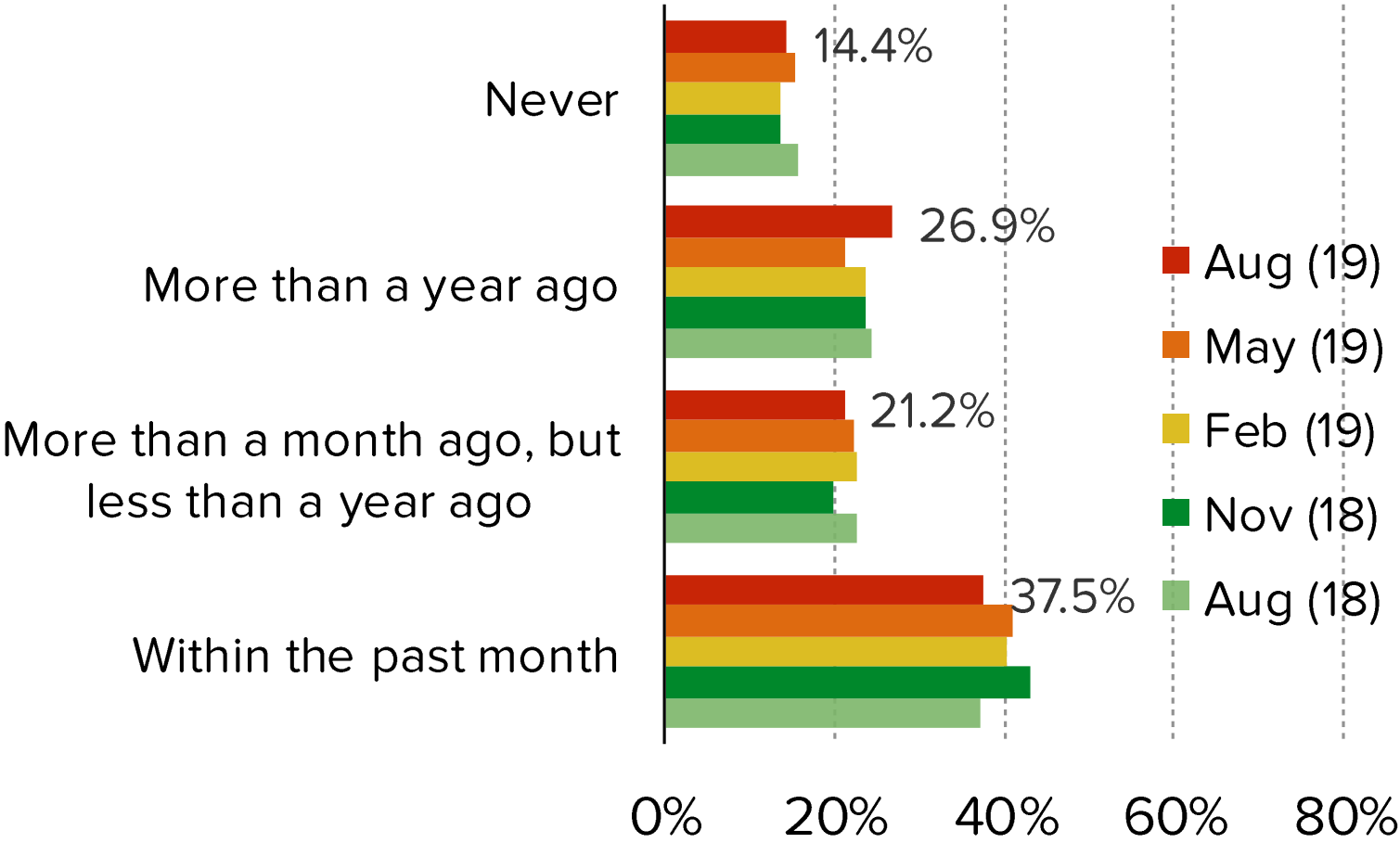


Davids vs. Goliaths

OLAY

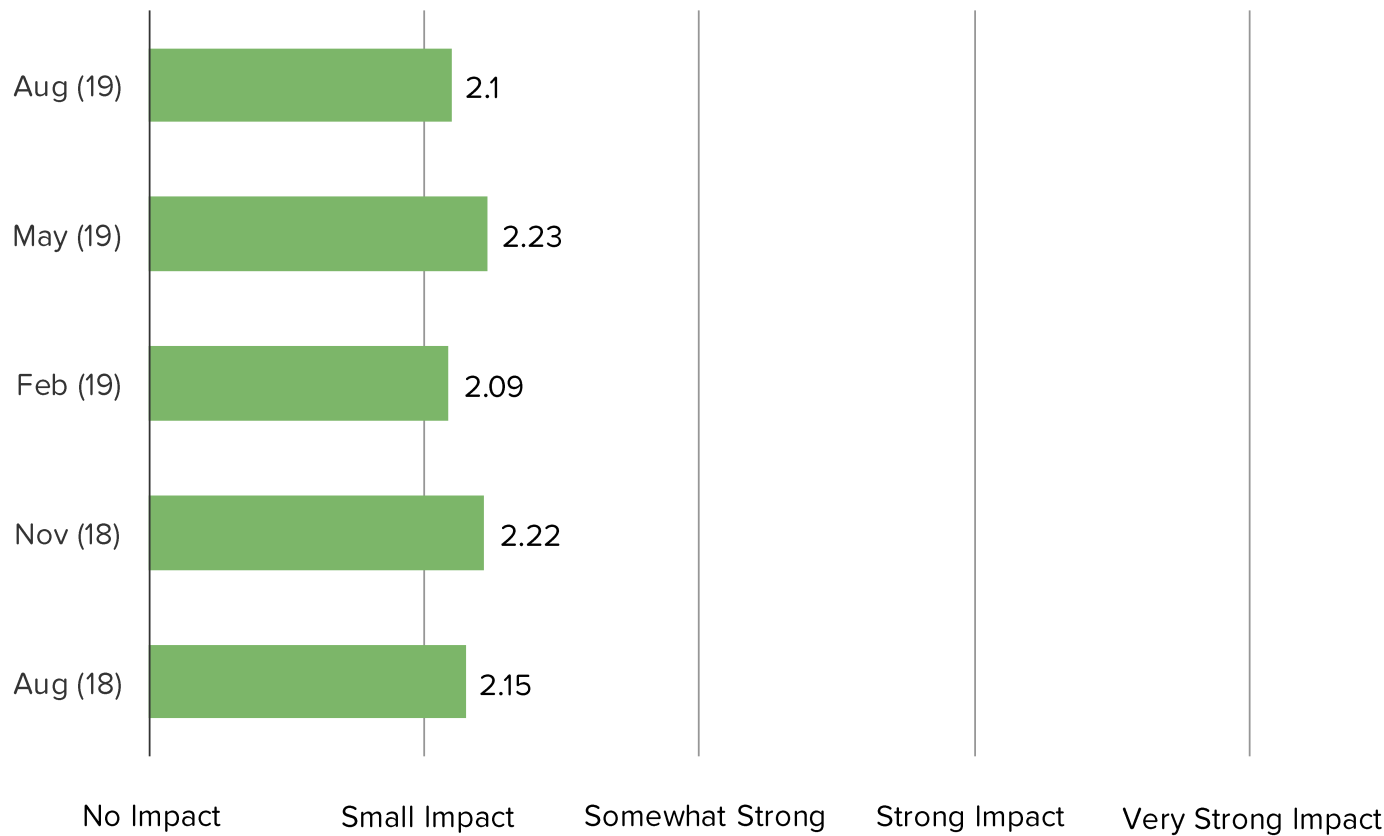
WHEN IS THE LAST TIME YOU HAVE USED OLAY SKIN CARE PRODUCTS?

Posed to respondents who make purchase decisions related to buying skin care products



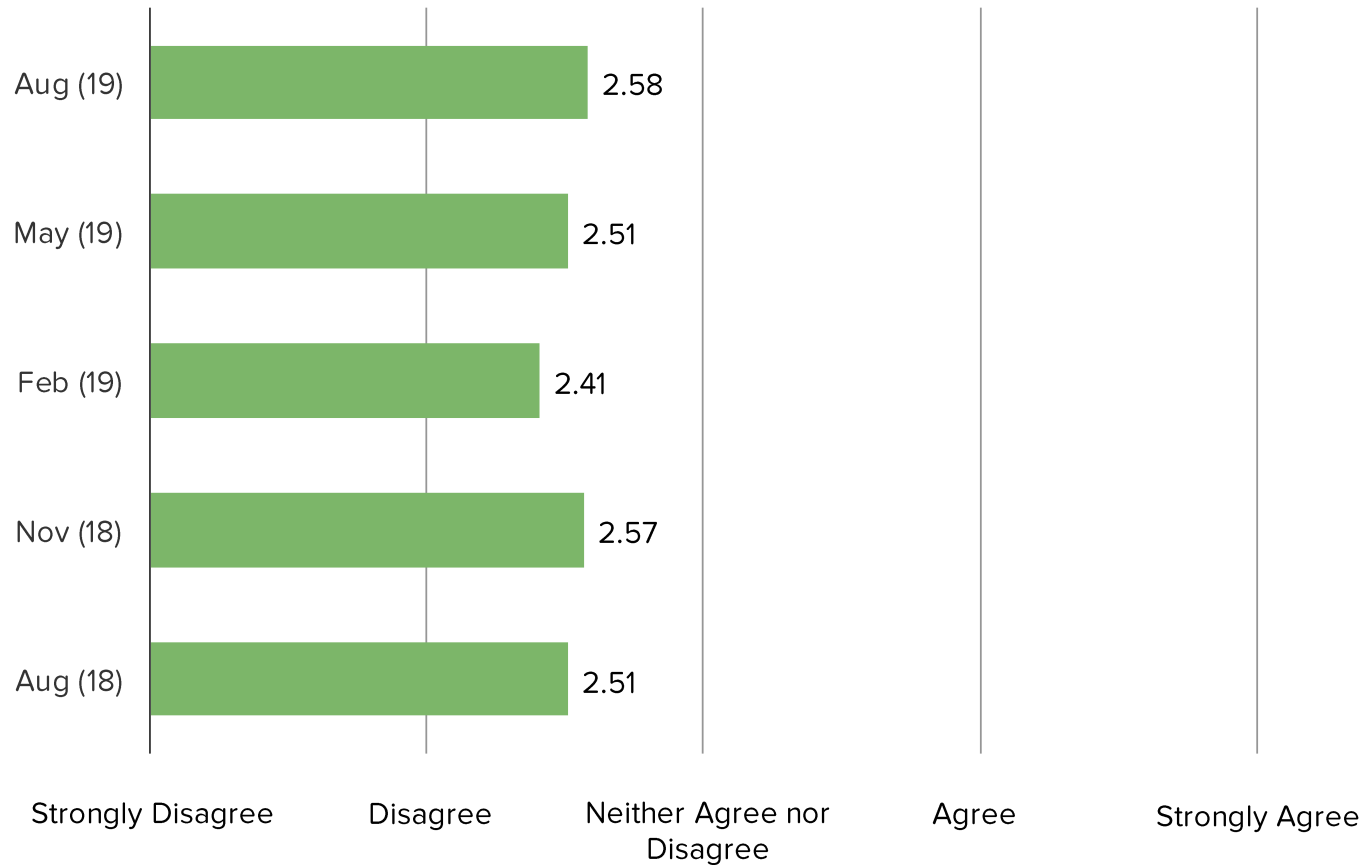
HOW MUCH OF AN IMPACT DOES BRAND ADVERTISING / CELEBRITY ENDORSEMENTS HAVE ON YOUR PURCHASE DECISIONS FOR SKIN CARE?

Posed to respondents who make purchase decisions related to buying skin care products



“I AM GETTING BORED OR TIRED OF THE OLAY BRAND”

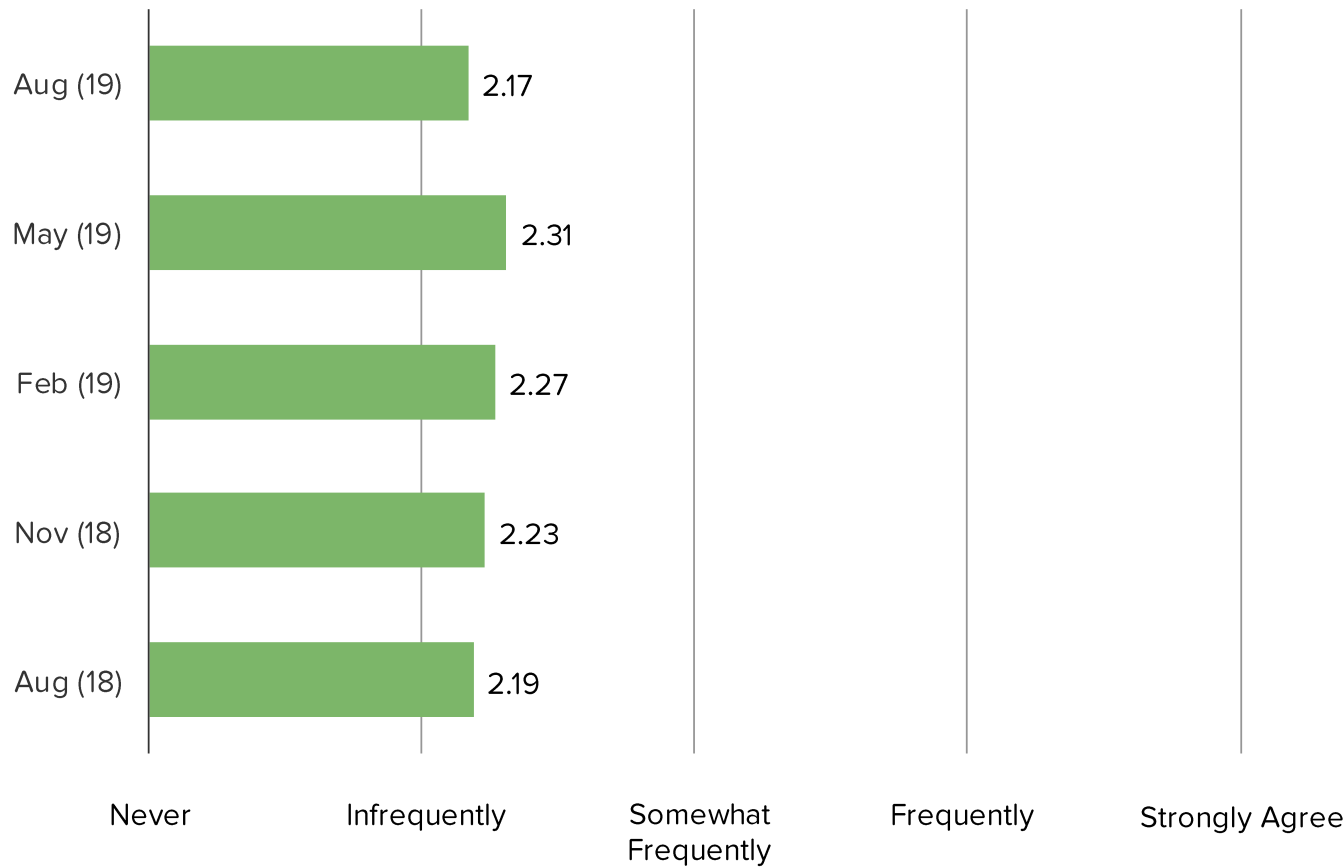
Posed to respondents who make purchase decisions related to buying skin care products



FABRIC CARE

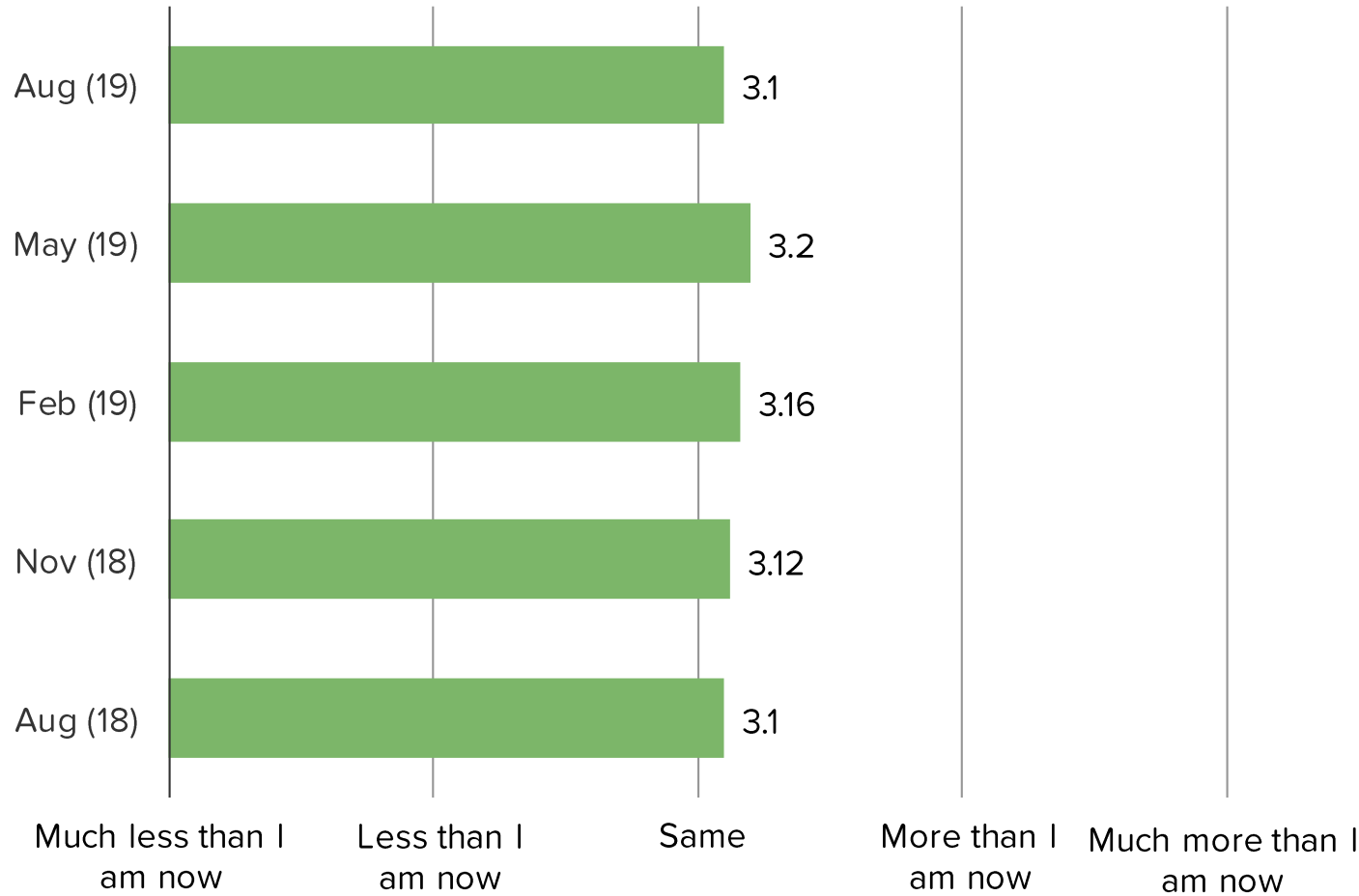
THINKING ABOUT FABRIC CARE, HOW OFTEN DO YOU BUY ECO-FRIENDLY ALTERNATIVES (EG, MRS MEYERS, SEVENTH GENERATION, ETC)?

Posed to respondents who make purchase decisions related to buying fabric care products



GOING FORWARD, HOW OFTEN DO YOU EXPECT TO BUY ECO-FRIENDLY FABRIC CARE PRODUCTS (EG, MRS. MEYERS, SEVENTH GENERATION)?

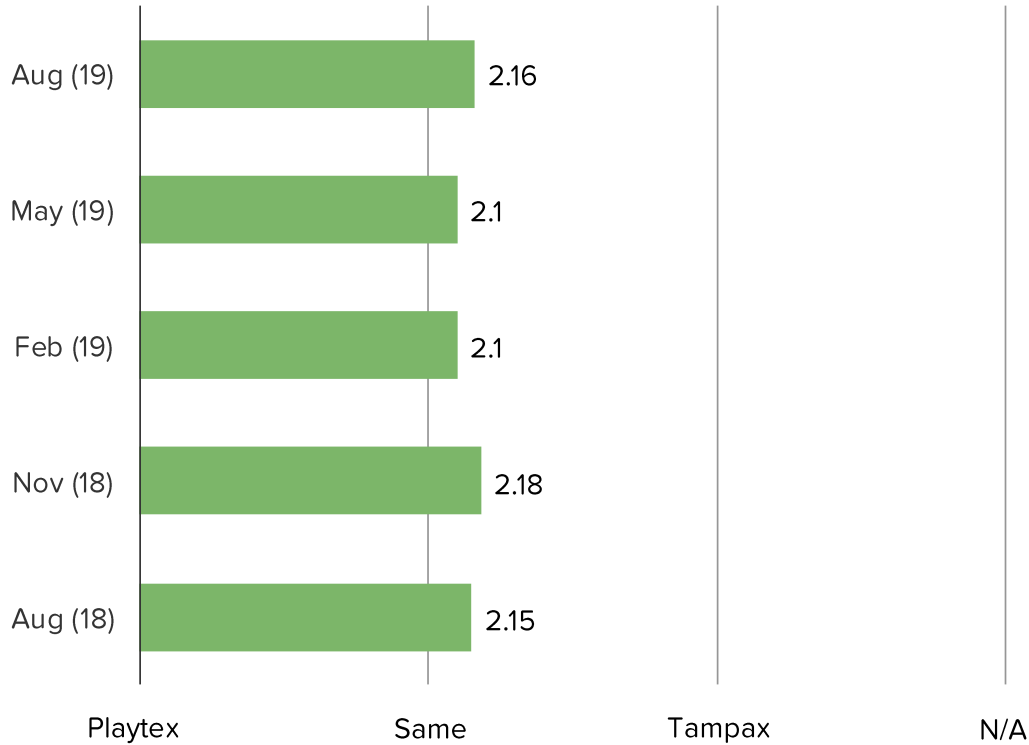
Posed to respondents who make purchase decisions related to buying fabric care products



FEMININE PRODUCTS

IN YOUR OPINION, WHICH OF THE FOLLOWING BRANDS IS SUPERIOR?

Posed to respondents who make purchase decisions related to buying feminine products



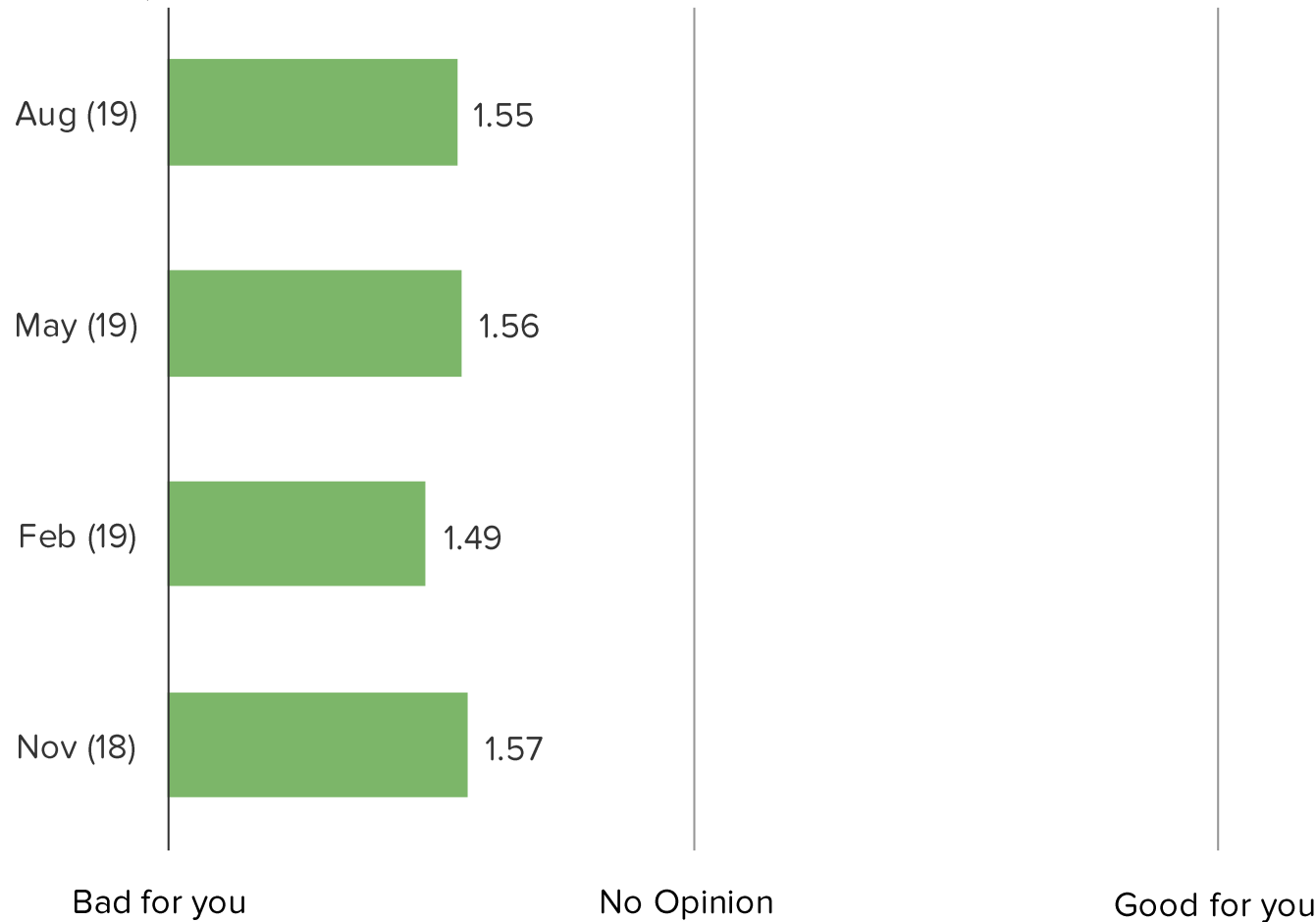
Reasons why those with an opinion favor one brand over the other.



SODA

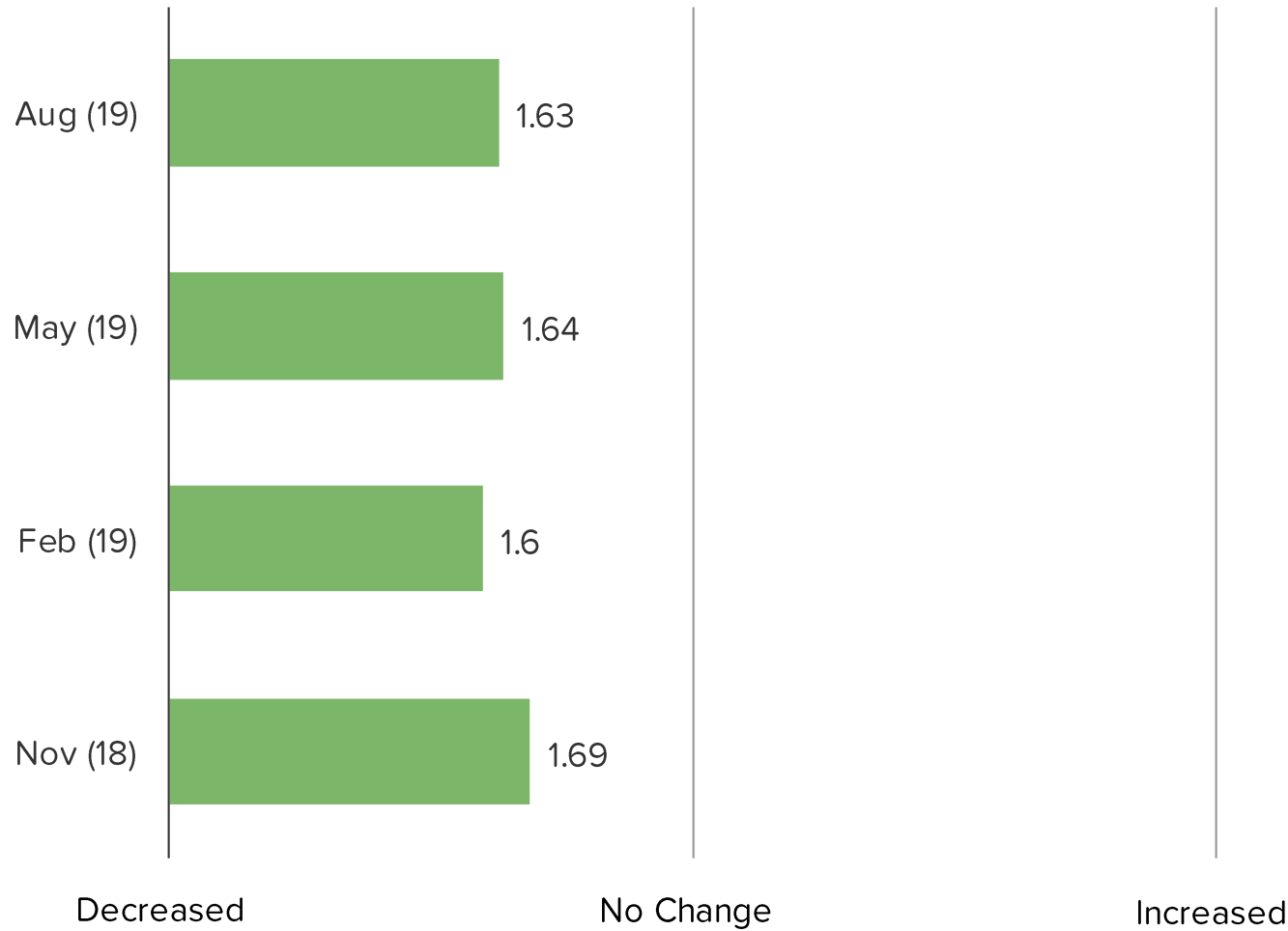
IN YOUR OPINION, IS SODA...

Posed to all respondents



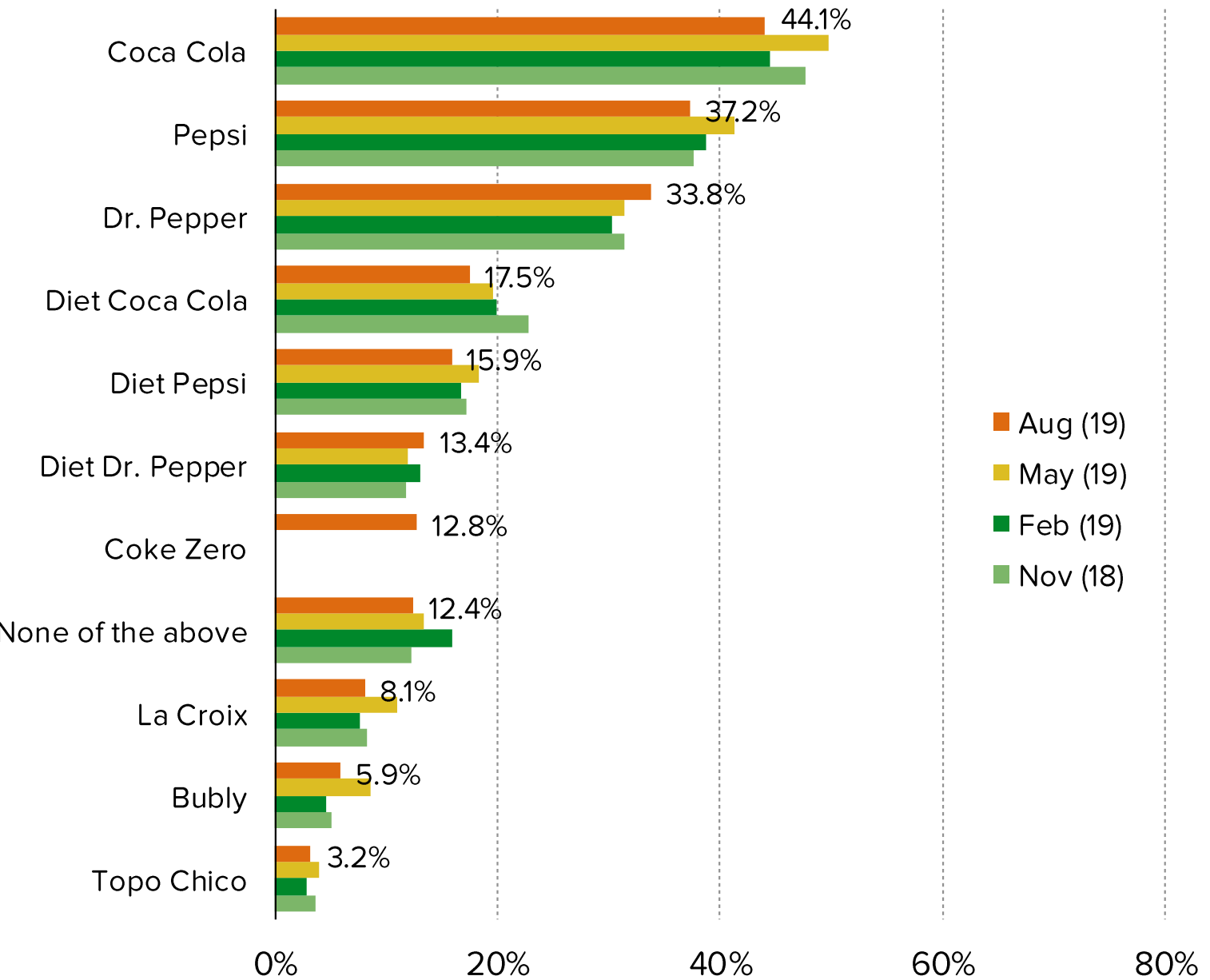
HAVE YOU CHANGED HOW OFTEN YOU DRINK SODA?

Posed to respondents who drink soda at least infrequently



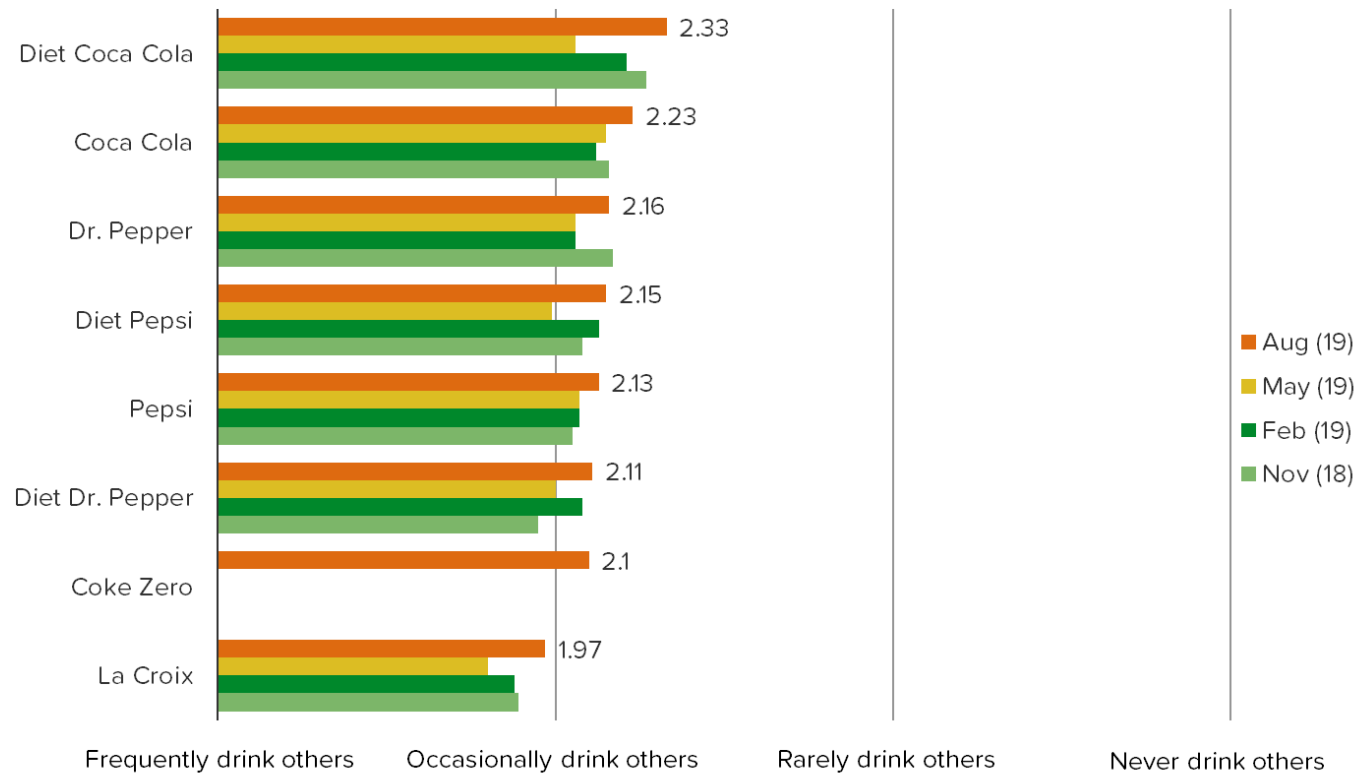
WHICH OF THE FOLLOWING DO YOU DRINK REGULARLY OR OCCASIONALLY?

Posed to respondents who drink soda at least infrequently



HOW LOYAL ARE YOU TO...

Posed to respondents who drink each of the following regularly or occasionally



DO YOU EXPECT TO DRINK THE FOLLOWING MORE OR LESS OFTEN GOING FORWARD?

Posed to respondents who drink each of the following regularly or occasionally

