

Consumer Concept Acceptance Study



*A One Cell Monadic Concept test Conducted
By AC Nielson/BASES*

10/05

Where there's water...



**JAWS INTERNATIONAL LTD. CONCENTRATED CLEANERS IN CARTRIDGES
CONSUMER CONCEPT
ACCEPTABILITY STUDY
(MR# B0676 - CLASS A)**

Purpose of the Research

Respondents in recent focus groups (MR# E0579) expressed interest in the concept. The purpose of this research is to measure the trial potential of this concept, and to generate rough Year 1 volume estimates for branded Refill Cleaners.

Criteria

In order to be pursued, this idea should score in the top third of the Database in terms of Purchase Intent, Overall Liking and Value, and yield a minimum Year1 volume estimate of \$50 million.

Implications

This idea, comprised of six JAWS formulas developed and positioned for consumers, generated above average purchase intent, liking, value and uniqueness ratings, and an estimated \$85.2 million in Year 1 retail sales based on a \$35 million marketing plan. We should continue exploring ways to develop this idea for consumers.

Key Findings

- Two-thirds of consumers gave this concept top-2 box purchase intent ratings, which is above average for cleaner concepts. All-purpose cleaner buyers and leading brand buyers were especially interested (75% and 78% TTB respectively.) The concept (“save money, space and the environment”) meets a need for 80% of consumers.
- Favorable consumers said they would buy an average of 1.6 units at trial, primarily the disinfecting cleaner (45%), bathroom cleaner (35%) and multipurpose kitchen degreaser (34%). Looking at units chosen at trial, 27% are disinfecting cleaner, 21% each bathroom cleaner and kitchen degreaser, and the balance (30%) the other 3 SKUs (glass cleaner, odor eliminator and food contact surface sanitizer.) They believe they would buy about 8 times a year, or every month and a half – a below average number for cleaners, but reasonable given that a single purchase of this product represents 3-32 ounce bottles.
- Liking is above average for cleaners – 62% said they like this idea extremely or very well (TTB on a 6-point scale).
- The value rating is also above average – more than two-thirds (68%) say that \$4.49 for 3 cartridges (plus the bottle) represents a very or fairly good value (TTB).
- Uniqueness is very strong. Nearly everyone (87%) believes this represents an extremely or very new and different idea (TTB).
- Current cleaner use runs the gamut of competitive and leading brands. Twelve percent of favorable consumers mention 409 (APC or glass and surface), 13% CCU APC, 3% leading brand bathroom cleaner, 2% leading brand Tile Cleaner and 3% CDS. Snapshot does not measure source of volume in a legitimate way, but this provides a sense of where we might experience cannibalization. Most favorable consumers would replace what they buy today with these products.
- Most attribute ratings are strong. Seventy-five percent of respondents agree (TTB) that Refill Cleaners *would be more efficient to store*. More than 60% agree they *would be a more convenient way to purchase cleaners*, that leading brand cleaners are *brands you know and trust*, they *would be convenient to use*, *high quality products*, *more economical than what you use today* and *effective cleaners*. Fifty-nine percent say they *would have many different uses*. Fewer,

though, agree they *would solve a problem that you have* (44%), *make cleaning easier* (42%), *be better than what you have available today* (40%) and *would make your home healthier* (39%).

- While the leading brand is a known and trusted brand, it is not essential to this proposition – only 40% of consumers agree that it is important that these are made by the leading brand (TTB).
- The three-pack seems to be the right size, also. When asked about other configurations, only 46% said they would be interested in purchasing single cartridges, and 30% were interested in a 6-pack option (TTB). Seventy-three percent said here they would prefer the 3-pack when given the three options described here.
- Interest does not appear to be correlated with the amount of storage space consumers have. Most consumers say they have "very little storage space for cleaning products" and there's no difference between favorable consumers and those not as interested in the idea. Favorable consumers are directionally but not significantly more likely to buy cleaning products in bulk from places like Costco. And the only demographic skew is among females, who are significantly more likely to want to buy this product than makes.

METHODOLOGY

Requesting Brand or Group: JAWS International LTD.

Location: US Internet sample

Product(s) Tested: JAWS Concentrated Cartridge Cleaners

Research Design: This study was conducted and tabulated by AC Nielsen/BASES. This was a one-cell monadic concept test. The concept was tested via electronic image among a nationally representative sample of mostly female (80%) heads-of-households that are primary grocery shoppers. Respondents were contacted and screened via e-panel (See questionnaire outline– Appendix 1). Questions include purchase interest, anticipated purchase and usage frequency, overall liking, price/value, uniqueness, believability, attribute ratings, category usage and other classification questions and demographics.

Dates of Interviewing: October 2005

Introducing **LEADING BRAND** Refill Cleaners

Save money, space and the environment

I like to save money, and I don't like to waste things.

Introducing Leading Brand Refill Cleaners — reduce the cost of your cleaning products by 30% while you save space and protect the environment.

Leading Brand Cleaners are two-inch plastic cartridges of super-concentrated cleaner that fit in the top of a regular spray bottle. Fill the bottle with water, insert the cartridge, then insert the trigger. When you screw the trigger on, it releases the super-concentrated cleaning solution into the water, giving you a full bottle of regular strength cleaner.

Leading Brand Refill Cleaners give you the same performance as other premium cleaners, but you'll save about 30% vs. regular cleaners because there is less packaging. Each cartridge takes up no more space than a pack of gum, and are available in convenient 3-packs, so you'll always have cleaner available.



**Tile, Grout & Bathroom Cleaner/Deodorizer,
Multi-Purpose Cleaner/Degreaser,
Glass & Hard Surface Cleaner,
Disinfectant Cleaner Degreaser,
and Liquid Malodor Counteractant**

**\$4.49 for 3-pack of cartridges, any variety.
Each cartridge makes 22 ounces of product.
Free bottle with purchase.**

Study Summary		
Concept Name	Leading Brand Refill Cleaners	
Study Name and Number	Jaws Packaging Technology #25102	
Brand		
Positioning	"Save money, space and the environment"	
Sizes	3-pack of cartridges, free bottle with purchase.	
Price (\$)	\$4.49	
Field Date	10/13/05	
Sample	Adults	
Concept Key Measures		
	Scores Among: GP	Versus Database*
Total Respondents (N)	212	
<u>Weighted Concept Purchase Intent (%)</u>		Top
Definitely Would Buy	25	Middle
<u>Probably Would Buy</u>	<u>41</u>	
Top Two Box	66	Top
Mean Liking Rating (6 Pt)	4.6	Top
Mean Value Rating (5 Pt)	4.0	Top
Mean Uniqueness Rating (5 Pt)	4.4	Top
Mean Claimed Trial Units (fav.)	1.6	Top
Mean Claimed Annual Purch. Freq. (fav.)	7.9	Bottom
Concept Potential Score (CPS)	359	Middle
*Scores Compared to Database of: ~1100 APC, bathroom cleaner, glass cleaner, and disinfectant concepts tested in the past 10 years		
Volume & Marketing Plan Information		
Home Care Marketing Plan	H	
Distribution Level	High	
Advertising Type	TV/Print	
<u>Total Spending (MM)</u>	<u>\$35.0</u>	
Advertising (MM)	\$20.0	
Consumer (MM)	\$10.0	
Trade (MM)	\$5.0	
Other (MM)	\$0.0	
Ballpark Unit Volume (MM)	19.0	
BallPark Retail \$ Volume (MM)	\$85.2	
Core Attribute Ratings - Household		
	Top 2 Box (7 Pt)	Vs. Database
Would Be High Quality Products	63	MIDDLE
Would Have Many Different Uses	59	TOP
Would Be Better Than What You Have Available Today	40	BOTTOM
Is A Brand You Know & Trust	68	MIDDLE
Would Be Convenient To Use	66	MIDDLE