Procter & Gamble Company (A)

P & G's Light-Duty Liquid Detergents

In November 1981, Mr. Chris Wright, associate advertising manager of the Packaged Soap & Detergent Division (PS&D) of the Procter & Gamble Co. (P&G) was evaluating how the division could increase volume of its light-duty liquid detergents (LDLs).[1] The excellent growth of Dawn dishwashing liquid since its national introduction in 1976 meant that P&G now manufactured and sold three leading LDL brands, holding a 42% share (by weight) of the industry's $850 million in factory sales.

Based on input from the three LDL brand managers who reported to him, as well as his own knowledge of the LDL category, Wright believed there were three major opportunities for volume growth: (1) the introduction of a new brand, (2) a product improvement on an existing brand, and/or (3) increased marketing expenditures on existing brands. In preparation for an upcoming meeting with Bruce Demill, PS&D advertising manager, Wright began evaluating the volume and profit potential of the three options.

Company Background

In 1837, William Procter and James Gamble formed a partnership in Cincinnati, Ohio, so that they could buy more efficiently the animal fats essential to the manufacture of their respective products—candles and soaps. The Procter & Gamble Company emerged from this partnership and quickly gained a reputation as a highly principled manufacturer of quality goods. As James Gamble said: "If you cannot make pure goods and full weight, go to something else that is honest, even if it is breaking stone."

In 1890, the Procter & Gamble Company was incorporated with a capital stock value of $4,500,000. This capital allowed P&G to build additional plants, buy new equipment, and develop and introduce new products. Sales volume more than doubled every 10 years following

[1] LDLs are defined as all mild liquid soaps and detergents designed primarily for washing dishes.

This case was prepared by Alice MacDonald Court, Research Associate, under the direction of Assistant Professor John A. Quelch as the basis for class discussion rather than to illustrate either effective or ineffective handling of an administrative situation. Names and proprietary data have been disguised but all essential relationships have been preserved.

incorporation, largely as a result of new-product introductions. By 198l P&G operated in 26 countries and sales totaled $11.4 billion, of which 70% were made in the United States (see **Exhibit 1**). P&G manufactured 90 consumer and industrial products in the United States and sold the leading brand in 14 of the 24 consumer-product categories in which the company competed (see **Exhibit 2**). One or more of P&G's products were used in 95% of homes in the U.S. homes—a penetration unequaled by any other manufacturer. P&G had historically grown both by developing products internally and by acquiring companies to which P&G's technological expertise was applied.[2]

P&G executives attributed the company's success in the marketplace to a variety of factors: (1) dedicated and talented human resources, (2) a reputation for honesty that won the trust and respect of their suppliers and customers, (3) prudent and conservative management that encouraged thorough analysis prior to decision making, (4) innovative products offering superior benefits at competitive prices, and (5) substantial marketing expertise. The following quotes from company executives and outside analysts emphasize these factors:

> If you leave the company [P&G] its money, its buildings and its brands, but take away its people, the business will be in real jeopardy; but, if you take away the money, the buildings and the brands, but leave the people here, we will build a comparable new business in as little as a decade.
>
> *—Richard R. Deupree, Chairman of the Board, P&G, 1948–1958*

> Our predecessors were wise enough to know that profitability and growth go hand in hand with fair treatment of employees, of customers, of consumers and of the communities in which we operate.[3]
>
> *—Edward G. Harness,*
> *Chairman of the Board, P&G, 1974–1981*

> There is no potential business gain, no matter how great, which can be used to justify a dishonest act. The ends cannot justify the means because unethical means, in and of themselves, can and will destroy an organization. . . . The total dedication to integrity in every aspect of the business, and the restless, driving spirit of exploration have already been vital to the company's past, and are critical to the company's future.
>
> *—Owen B. Butler,*
> *Chairman of the Board, P&G, 1981–*

> Key to Procter & Gamble's continued growth is the importance we attach to research and development. . .if anything, research and development will take on even greater importance to us in the future.
>
> *—John Smale,*
> *President, P&G, 1981–*

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[2] P&G acquired the Duncan Hines Companies (prepared cake, cookie and muffin mixes) in 1956; Charmin Paper Mills (toilet and facial tissues, paper towels, and paper napkins) in 1957; the Folger Coffee Company (ground, flaked and instant coffee) in 1963; the Crush Companies (Crush, Sun Drop, and Hires Root beer soft drinks) in 1980; the Ben Hill Griffin Citrus Company (concentrated fruit juices) in 1981; and Morton Norwich (pharmaceuticals) in 1982.

[3] As quoted by Oscar Schisgall in *Eyes on Tomorrow* (Chicago: J.G. Ferguson Publishing, 1981). All other quotations are drawn from P&G recruitment literature.

> Disciplined and consistent. P&G people plan, minimize risk, and adhere to proven principles.
>
> —*Ogilvy and Mather*
> *(Advertising agency)*

> The secret, in a word, is thoroughness. P&G manages every element of its business with a painstaking precision that most organizations fail to approach.
>
> —Fortune

Company Organization

The company comprised eight major operating divisions organized by type of product: Packaged Soap & Detergents, Bar Soap & Household Cleaning Products, Toilet Goods, Paper Products, Food Products, Coffee, Food Service & Lodging Products, and Special Products. As **Exhibit 3** shows, each division had its own brand management (called advertising), and its own sales, finance, manufacturing and product development line management groups. These groups reported directly to the division manager, typically a vice president who held overall profit and loss responsibility. The divisions used centralized corporate staff groups for advertising services,[4] distribution and purchasing.

The advertising department was formed in 1930 when P&G initiated its brand management system. This system allowed P&G to market aggressively several brands in the same product category by assigning the marketing responsibility for each brand to a single brand manager. He or she led a brand group that included an assistant brand manager and, depending on the dollar volume and marketing complexity of the product, one or two brand assistants. This group planned, developed and directed the total marketing effort for its brand. It was expected to manage aggressively the marketing of the brand, and to know more about the brand's business than anyone else in the organization.

One of the most important responsibilities of the brand group was the development of the annual marketing plan, which established volume objectives, marketing support levels, strategies and tactics for the coming year. This plan took approximately three months to develop. It reflected substantial analysis of previous business results by the brand group. Additionally, the brand group solicited input from six to twelve internal staff departments and an outside advertising agency. Then it recommended a marketing plan, which was reviewed by three levels of management: the associate advertising manager, the advertising manager, and the division general manager. Since the planning process established the marketing plans and volume expectations for the coming year, it was regarded as a key determinant of brand progress. In addition, this process offered the brand groups substantial opportunity to interact with upper management. (Details of the planning process are presented in **Exhibit 4**.)

Promotion was based entirely on performance and all promotions were from within the organization. Brand managers were evaluated on their ability to build brand business and to develop their people. A brand manager who demonstrated excellent management ability was promoted to associate advertising manager (see **Exhibit 3**). Associate advertising managers used the skills they had developed as brand managers to guide the marketing efforts of several brands within a division, as well as to further the development of their brand managers. Associates also became involved in

[4] Advertising services included the following specialized staff departments: TV commercial production, media, copy services, art and package design, market research, field advertising, marketing systems and computer services, and promotion and marketing services.

broader divisional and corporate issues. For example, the associate responsible for coordinating division personnel policy would evaluate future personnel needs, coordinate recruitment efforts, ensure consistent evaluation methods, analyze training needs, develop a training budget and work with the personnel department to implement training programs.

Each associate advertising manager reported to an advertising manager, who was responsible for the total marketing effort of all of a division's brands. The advertising manager played a significant role in the general management of the division, as he or she was responsible for approving the brand group's recommendations for volume objectives, marketing plans and expenditures. In addition, the advertising manager had responsibility for approving each brand's advertising plans, as recommended by its brand group and its advertising agency.[5] All new advertising required the approval of the associate advertising manager and the advertising manager, while significant changes in advertising direction required division manager approval.

Historically, brands competing in the same product category were assigned to different associate advertising managers within a division to assure maximum interbrand competition. Each of the associates promoted the interests of his or her own brand to the advertising manager, who then coordinated the most effective and efficient use of limited divisional resources. In the fall of 1981, however, the PS&D Division was reorganized such that each associate advertising manager became responsible for all the brands within a single product category, as shown in **Exhibit 5.** This change focused authority for key decisions within category groups (e.g., LDLs) at the associate advertising manager level, thus allowing the advertising manager to spend more time on divisional issues. The brand manager promoted the interests of his brand while the associate advertising manager assumed responsibility for building the business of all P&G brands in his or her category.

Advertising's Relations with Other Line Departments

The brand groups worked closely with the following four line departments in both the development and the implementation of their marketing plans:

Sales. P&G's consumer divisions employed 2,310 sales representatives and 574 sales managers, who serviced an estimated 40% of grocery, drug, and mass merchandise retail and wholesale outlets, accounting for an estimated 80% of all grocery and health and beauty aid sales volume.[6] The PS&D Division employed 408 sales representatives and 102 sales managers, who serviced 27% of grocery outlets accounting for 75% of grocery sales volume. The PS&D sales force did not directly service drug and mass merchandise outlets because of their modest sales potential.

P&G sales representatives were well trained and regarded by the trade as consistently professional. Richard Penner, district sales manager, said:

> Our sales representatives must be experts and professionals in their field. Our customers know that our sales representatives are well-trained professionals whose objective is not only to sell a good, quality product, but whose expertise can show them how to improve overall productivity; people who will bring them business-building merchandising ideas for the next feature or drive, which will reach

[5] P&G retained 10 leading advertising agencies to work with the brand groups on advertising issues, of which 7 worked on the PS&D Division's products. Each LDL was handled by a separate agency. P&G's relationship with most of its agencies was long-standing, and many of the brands had been handled by the same agency since their introduction.

[6] Small convenience and corner stores accounted for most of the remaining 60% of retail outlets. P&G did not directly service these stores, as they accounted for only 20% of all commodity volume. These stores could, however, obtain P&G products through wholesalers.

present as well as new customers, thus increasing overall turnover and profit for the store.

The brand groups and sales force frequently interacted. While the brand groups managed categories and brands, the sales force managed markets and accounts. As such, the sales force provided important perspective and counsel on trade and consumer promotion acceptance, stock requirements to support promotions, competitive pricing and promotion activity, and new-product activity. Each brand group worked closely with the sales force to develop the optimal sales promotion plan for its brand together with appropriate merchandising aids. An understanding of the sales function was considered so important to successful marketing planning that each brand assistant was trained as a sales representative, and spent three to five months in the field sales force.

Product development department (PDD). Since superior product performance was key to the success of P&G products, each brand group worked closely with PDD to ensure continued improvement of its brand's quality. Fifteen professionals worked exclusively on research and development for LDLs. The PDD continually strove to upgrade product quality or explore new-product formulations. If a potential new product was developed, it was extensively tested in consumer and laboratory tests before any test marketing began.

In 1981, P&G spent $200 million on research and development. This spending supported the efforts of about 3,500 employees. Approximately 1,200 were professionally trained staff, and nearly one-third of these held doctoral degrees. P&G had six major research centers, four of which were located in the United States. The PS&D Division spent $30 million on research and development in 1981, which supported the efforts of about 500 employees.

Manufacturing department. P&G operated 40 manufacturing plants in 24 states. The PS&D Division utilized 10 of these facilities to manufacture its products. The brand group provided the manufacturing department with detailed brand volume estimates (by month, size, and form/flavor) to facilitate efficient production, as well as five-year volume base forecasts for capacity planning. In addition, the brand group discussed promotions requiring label or packaging changes with manufacturing to determine the most efficient production methods. Manufacturing informed brand groups about ongoing manufacturing costs and provided potential cost-savings ideas. Interaction between the advertising and manufacturing departments was particularly frequent during any new-product development process, and included discussions on manufacturing requirements, custom-packing options for test markets, and critical paths for production.

Finance department. P&G's finance department was divided into three major functional areas: divisional financial/cost analysis, treasury, and taxation. Both treasury and taxation were centralized groups, while financial/cost analysis was divisionalized, and reported to the division manager (see **Exhibit 3**). Based on volume and marketing expenditure forecasts provided by the brand groups, financial/cost analysts developed and fed back brand profit and pricing analyses as well as profit and rate-of-return forecasts on new products and promotions. This information was key in helping the brand groups to recommend action which would maximize volume and profit growth.

Advertising services department. Within the department, there were nine staff groups which serviced the advertising department. These were market research, art and package design, TV commercial production, media, copy services, field advertising, marketing systems and computer services, promotion and marketing services, and advertising personnel.

P&G's extraordinary depth of staff resources was considered a key competitive advantage. For example, P&G invested an average of $20 million annually on consumer and market research,[7] 10% of which was spent on PS&D Division projects. PS&D market research included the following:

1. Market analysis, including bimonthly syndicated market data that P&G purchased from A.C. Nielsen Co.,[8] as well as selected data purchased from Nielsen, Selling Areas Marketing, Inc. (SAMI) and other suppliers for test markets.

2. Consumer research, including studies to:
   a. monitor how consumers used products and track consumer usage of, attitude towards, and image of P&G and competitive brands;
   b. test the performance of current products and possible product modifications under in-home usage conditions; and
   c. evaluate the advertising, packaging, promotion and pricing of P&G brands; also, to evaluate the potential of new-product ideas, using such techniques as concept research and simulated test markets.

The major strength of P&G's consumer research was the quality of interviewing and consistent methodology among projects. This provided P&G with large data bases of comparable research over several years from which P&G could establish norms and accurately track changing consumer perceptions and habits. Only a limited amount of the research was actually conducted by P&G employees; most was conducted by outside suppliers, but was closely supervised by P&G market researchers.

Light-Duty Liquid Detergents

During the 1940s, most U.S. consumers used powdered laundry detergents to wash their dishes. Research indicated, however, that consumers found these detergents harsh on hands. In response to these concerns, P&G designed a mild, light-duty liquid in 1949. By 1981, the LDL industry recorded factory sales of $850 million and volume of 59 million cases.[9] The average U.S. consumer had 1.5 LDL brands at home at any one time, used 0.6 fluid ounces of product per sinkful of dishes, and washed an average of 12 sinksful each week. The average purchase cycle was three to four weeks, and an average household would use over one case of product each year. As **Table A** shows, the most popular sizes in the category were 32 oz. and 22 oz.

Table A Sizes of Dishwashing Liquid Used in Past Seven Days

	48 oz.	32 oz.	22 oz.	12 oz.
% Respondents	13%	30%	42%	15%

Source: Company research.

[7] This $20 million was part of the $200 million the company spent on research and development.

[8] The A.C. Nielsen package that the LDL brands purchased included data on retail shelf movement and share, distribution penetration, retailer feature advertising, special displays, regular and feature prices, out-of-stocks, retail inventories, and percent of brands sold in special packs.

[9] Volume is measured in P&G statistical cases, each containing 310 ounces.

Table B suggests that LDL consumption increases, resulting from the growing number of U.S. households,[10] were partly offset by increased penetration of automatic dishwashers (ADWs), as ADW households used one-half as much LDL as non-ADW households.[11] Based on these trends, the LDL brand groups projected category volume growth of 1% per year over the next 5 years.

Table B U.S. LDL Market Influences

	1960	1970	1980	1990[a]
LDL Household Penetration	53%	83%	90%	92%
ADW Household Penetration	5%	18%	36%	44%
Total Households (millions)	53	63	79	91

[a] Company estimates

LDLs could be conceptually divided on the basis of product benefit into three major segments: (1) the performance segment (35% of category volume) provided primarily a cleaning benefit; (2) the mildness segment (37% of category volume) provided primarily the benefit of being gentle to hands; and the price segment (28% of category volume) whose primary benefit was low cost.[12] As **Exhibit 6** indicates, the performance segment had experienced the greatest growth in the past 10 years. Some LDL brand managers expected the performance segment to continue to grow at the expense of the mildness segment, since market research indicated that more consumers rated performance attributes (such as grease cutting and long-lasting suds) as the most important (see **Exhibit 7**). The price segment had been in decline, but was expected to stabilize at its current share level due to increasing consumer price sensitivity resulting from the depressed state of the economy. LDL brand managers did not expect this segment to grow because most price brands were not a good value, requiring two or three times as much volume to create the same amount of suds as a premium brand. P&G's Ivory Liquid, the market leader, used this comparison in its advertising to persuade consumers that Ivory was a better value.

The LDL market was relatively stable, with one new premium brand introduced every two and one-half years and an average of two price brands introduced and discontinued per year. As **Exhibit 8** shows, 3 companies sold almost 75% of LDLs, with P&G holding a 42% share[13] of the market, Colgate-Palmolive Company a 24% share, and Lever Brothers, the U.S. subsidiary of Unilever, a 7% share.[14] The remaining 27% of the market consisted mainly of generic and private-label brands.

As shown in **Exhibit 9**, marketing expenditures including advertising and promotion typically represented 20% of the sales of an established LDL brand.

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[10] Household growth was a better indicator of LDL volume than population growth (research indicated LDL household consumption varied only slightly with the number of people in the household).

[11] ADW households still used LDL for pots and pans and small cleanups.

[12] Price brands were sold to retailers for an average of $7.50 per statistical case versus $17.00 per statistical case for the premium-priced mildness and performance brands.

[13] *Share of market* is defined as share of statistical case volume.

[14] In 1981 Colgate-Palmolive Company's U.S. sales were $5.3 billion and Lever Brothers' U.S. sales were $2.1 billion.

Total advertising and promotion spending in the category in 1981 was $150 million, over half of which was spent by the P&G LDLs, the balance being spent primarily by Lever and Colgate-Palmolive.

Slightly over half of the marketing budgets of the P&G LDLs was allocated to advertising, versus only about 40% for both Colgate and Lever LDLs. Colgate and Lever sold an estimated 75% of their LDL volume to the trade on deal, compared to about half for P&G. Both Lever and Colgate had introduced a single new brand in the past 10 years. Dermassage, introduced in 1974 by Colgate, offered a similar benefit to Ivory, mildness to hands. The brand held only a 2% share in 1981. Sunlight, introduced by Lever into Phoenix (test market) in 1980, offered benefits similar to Joy, as a good cleaning, lemon-fresh LDL. The brand had achieved a 10% share in the test region after 12 months.

Procter & Gamble's LDL Brands

P&G's three brands in the LDL category (Ivory Liquid, Joy and Dawn) together accounted for 30% of the dollar sales volume and profit of the PS&D Division. While each of the three brands was a different formulation which offered a distinct benefit to appeal to separate consumer needs, all were marketed similarly. All three brands were sized and priced in line with major premium-priced competition (see **Table C**). Price increases occurred, on average, every 18 months.

Table C Ivory, Dawn and Joy Pricing

		Manufacturer's		
Size	**Items/Case**	**Carload Case Price**	**Carload Item Price**	**Average Retail Price**
48 oz.	9	$22.77	$2.53	$2.99
32 oz.	12	21.24	1.77	2.04
22 oz.	16	19.20	1.20	1.46
12 oz.	24	$16.08	$0.67	$0.84

In general, the brand managers spent over half of each LDL's marketing budget on advertising, of which 85–90% was spent on television media and commercial production, and the balance on print. Brands typically held four to six major promotion events each year, each lasting four weeks. Promotions primarily included coupons, price packs, bonus packs and trade allowances. Consumer promotions typically accounted for at least 75% of promotion dollars, while trade allowances made up the balance.

P&G's LDL brands held strongly established market positions as company research results reported in **Exhibit 10** reveal. Neither Ivory Liquid nor Dawn had changed its basic product benefits or basic advertising claims since introduction. Joy, however, had undergone two basic changes. It was first introduced as a performance brand, but during the 1960s, as the mildness segment of the market began to grow, it was restaged with a mildness benefit. By the 1970s, Ivory Liquid was clearly established as the major mildness brand; and as research revealed that a consumer need existed for a good cleaning brand, Joy was reformulated to provide a performance benefit and restaged.

Each brand's individual market position is discussed here:

Ivory Liquid was introduced in 1957 as an excellent dishwashing liquid that provided the additional benefit of hand care. Its mildness positioning was supported by the heritage of Ivory bar soap, a patented mildness formula, and unique product aesthetics (its creamy-white color and mild scent). In 1981 it was the leading brand, with a market share of 15.5%. Although Ivory's share had declined slightly over the previous five years, it was expected to remain stable over the next five years. Ivory's advertising copy featured a mother/daughter comparison to demonstrate its benefit of "young-looking hands." In 1968 the brand added a value claim stressing the fact that Ivory washed more dishes per penny of product than price brands because of its higher-sudsing formula. During 1981 Ivory allocated two-thirds of its advertising budget to the mildness message and the remaining one-third to the value advertising copy. (Television advertising storyboards for these two campaigns are presented as **Exhibits 11** and **12**.) The brand was perceived by consumers as the mildest and highest sudsing brand and had the highest ever-tried level in the category. For this reason, the principal objective of Ivory's consumer promotions was to encourage continuity of purchase rather than to stimulate trial.

Dawn was introduced in 1976 as a performance brand. In two years, it rose to the No. 2 position in the LDL category, and by 1981, held a 14.1% market share. Dawn captured about 70% of its volume from non-P&G brands, with the remaining 30% cannibalized equally from Ivory and Joy. Dawn's rapid growth was attributed to its unique position as the superior grease-cutting LDL in the category—a claim that was supported by its patented formula, which consumer research proved cut grease better than other formulas. The advertising claim "Dawn takes grease out of your way" was supported by a powerful product demonstration, as shown in the storyboard presented, as shown in **Exhibit 13**. Consumer research (reported in **Exhibit 14**) indicated that Dawn had the highest conversion rate of all the P&G LDL brands.[15] Dawn's promotion plan emphasized trial, with most of the budget allocated to consumer coupons. Its share was projected to increase to 16.5% over the next five years. It was expected to take over the leading share position from Ivory by 1985.

Joy, introduced in 1949, was P&G's first LDL. Since 1970, it had been formulated to provide a performance benefit, and it was positioned in advertising to deliver "beautiful dishes that get noticed and appreciated." Joy's lemon-based formula, lemon fragrance and yellow package supported this image. Joy advertising (see **Exhibit 15)** claimed that it "cleans dishes right down to the shine and isn't that a nice reflection on you." As **Exhibit 10** indicates, although Joy's image in the marketplace was good by category standards, it was not as strong as Ivory or Dawn. In addition, it had the lowest trial level of P&G's three LDLs. As a result, its promotion plan was trial-oriented, with particular emphasis on couponing. Joy's share of 12.1% was expected to increase by only 1% per year over the next five years.

Exhibit 16 reports factory shipments and market shares for each of the three brands over the past five years, as well as the brands' estimates for the next five years. **Exhibit 17** provides a demographic profile of users of each of the three P&G brands, illustrating how each brand appeals to a different consumer segment.

New Growth Opportunities

In evaluating the opportunities for further volume growth on P&G LDLs, Wright considered the following three options:

New brand introduction. The success of Dawn led Wright to wonder if another new brand with a distinctive benefit could further increase P&G's LDL volume. Based on the impact of Dawn's introduction and the current strength of P&G's LDL brands, he estimated that a well-positioned new brand could capture at least 60% of its share from competitive brands. However, after talking with manufacturing and PDD, he estimated that a new brand would require $20 million in capital investment to cover additional production capacity and bottle molds.[16] Further, based on input from

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[15] The conversion rate was the number of people citing a brand as their usual brand divided by total triers of the brand.

[16] This capital investment per case of estimated LDL volume was lower than the average for new P&G products, since substantial LDL manufacturing facilities already existed.

the Dawn brand manager, he estimated a new LDL brand would need at least $60 million for first-year introductory marketing expenditures.[17]

Wright saw new product potential in all three market segments. First, PDD had invented a new technology for a high-performance product. The formula, called H-80, combined suspended nonabrasive scrubbers[18] with a highly effective detergent system to provide superior cleaning versus other LDLs when used full strength on tough, baked-on foods and parity cleaning compared with other LDLs when diluted with water for general dishwashing. Wright believed that such a product could fulfill a clear consumer need, based on consumer research. Since market research indicated that 80% of U.S. households scour and scrub their dishes at least once a week, with an average household scouring four times a week, he believed that this product would be valued by a significant percentage of consumers.[19] In addition, the results of blind, in-home use tests, reported in **Exhibit 18**, were positive.

Second, Wright wondered if he could capitalize on P&G's expertise in the mildness segment to introduce another mildness brand. While the segment was currently declining, he believed there might be potential for a new brand if the mildness benefit could be further differentiated—just as had been done in the performance segment. As **Exhibit 19** shows, research indicated that when consumers were asked what improvement they wanted most in their current LDL, more stated "milder to hands" than any other product benefit.

Third, P&G could introduce a price brand. PDD and manufacturing had told Wright that they could produce a brand with parity performance benefits to existing price brand competition at a cost that would allow PS&D to maintain a reasonable profit. Specifically, the percentage of sales available for marketing expenditures and profit would fall to 14% of sales versus the 32% of sales available from P&G's current LDL brands. Wright noted that P&G did not currently have an LDL entry in this fragmented segment of the market, characterized by low-share brands with little brand loyalty and substantially lower product quality than the LDL brands P&G currently marketed. He wondered if P&G's marketing expertise could enable the company to capture a significant portion of the price segment with a parity product.

Product improvement on an existing brand. A product improvement on a current brand represented considerably less investment than a new brand, and Wright wondered if he would be wiser to introduce the H-80 formula as a product improvement to one of the current LDL brands. While he estimated that the capital costs associated with a product improvement would be about the same as introducing a new product ($20 million), incremental marketing expenditures over and above the existing brand budget would be only $10 million. He wondered which, if any, of his brands would benefit most from this change.

Separately, the Joy brand group was eager to restage the brand with a new "no-spot" formula. The formula, considered a technological breakthrough, caused water to "sheet" off dishes when they were air-dried, leaving fewer spots than other brands. In addition, the formula reduced Joy's cost of goods sold by about $3 million per year. The brand estimated this relaunch would cost $10 million in marketing expenses, but would require no capital investment.

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[17] This estimate was based on Dawn's 12-month introductory marketing plan. Using updated costs, a new brand would require $18 million for media support, $37 million for consumer and trade promotion support and $5 million for miscellaneous marketing expenses.

[18] The scrubbers were made from the biodegradable shells of microscopic sea organisms.

[19] Many consumers used soap-filled scouring-pads such as Purex Industries' Brillo pads and Miles Laboratories' S.O.S. pads. Retail sales of such pads approached $100 million in 1980.

Increase marketing expenditures on existing brands. Finally, given the low-growth potential of the LDL category, Wright wondered if his overall profits might be higher if he avoided the capital investment and introductory marketing expenses of a new brand or product improvement and simply increased the marketing expenditures behind the existing brands in an effort to build volume. In particular, the brand manager on Ivory Liquid had submitted a request for an additional $4 million to support extra advertising and promotion. Half of the funds were to be used to achieve leadership media levels for Ivory by increasing its current media level from 300 GRPs,[20]—which was the average level for major advertised LDL brands—to 365 GRPs. The remaining funds would be used to finance an incremental 20¢-off price-pack promotion on the 32 oz. size.

Conclusion

As Wright considered the various options available, he wondered about the time frame for implementation of each option. He knew that he could gain approval for increased marketing expenditures almost immediately if the plan was financially attractive—unless a test market was required, which would delay national approval by 6 to 12 months. Implementing a product improvement on an existing brand would take about a year (two years if a test market was necessary), and the introduction of a new brand would require two years plus a year in a test market before it could be expanded nationally. Could he undertake more than one option? What effect would each option have on each of the existing LDL brands? What competitive response could he expect? What were the long- and short-term profit and volume implications of each of the options?

[20] A GRP (Gross Rating Point) is a measure of media delivery. Gross rating points equal the percent of viewers reached over a specific period of time (usually four weeks) times the average number of occasions on which they are reached.

Exhibit 1 Consolidated Statement of Earnings ($ in millions except per share amounts)

	Fiscal Year Ending June 30	
	1981	**1980**
Income		
Net sales	$11,416	$10,772
Interest and other income	83	52
	11,499	10,824
Costs and expenses		
Cost of products sold	7,854	7,471
Marketing, administrative, and other expenses	2,361	2,178
Interest expense	98	97
	10,313	9,746
Earnings from operations before income taxes	1,186	1,078
Income taxes	518	438
Net earnings from operations (before extraordinary charge)	668	640
Extraordinary charge: costs associated with the suspension of sale of Rely tampons (less applicable tax relief of $58)	(75)	—
Net earnings	$593	$640
Per common share		
Net earnings from operations	$8.08	$7.74
Extraordinary charge	(.91)	—
Net earnings	$7.17	$7.74
Average shares outstanding 1981—82,720,858 1980—82,659,861		
Dividends	$3.80	$3.40

Source: Company records

Exhibit 2 Established U.S. Brands by Product Category, 1981

A. Consumer

Laundry and Cleaning

All Fabric Bleach
Biz (1967)[a]

Cleaners and Cleansers
#1-Comet (1956)[b]
Comet Liquid (1976)
Mr. Clean (1958)
Spic and Span (1945)
Top Job (1963)

Detergents/Soaps
Bold 3 (1976)
Cheer (1950)
Dash (1954)
Dreft (1933)
Era (1972)
Gain (1966)
Ivory Snow 1930)
Oxydol (1952)
Solo (1979)
#1-Tide (1946)

Dishwashing Detergents
Cascade (1955)
Dawn (1972)
#1-ivory Liquid (1957)
Joy (1949)

Fabric Softeners
Bounce (1972)
#1-Downy (1960)

Food

Coffee
#1-Folgers (vacuum packed and instant, 1963; flaked, 1977)
Instant High Point (1975)

Oil/Shortening
#1-Crisco (shortening,1911)
Crisco (oil, 1960)
Fluffo (shortening, 1953)
Puritan Oil (1976)

Orange Juice and Other Citrus Products
Citrus Hill

Peanut Butter
#1-Jif (1956)

Potato Chips
Pringles (1968)

Soft Drinks
Crush (1980)
Hires Root Beer (1980)
Sun-Drop (1980)

Prepared Mixes
#1-Duncan Hines (cake, 1956; brownie 1956; snack cake, 1974; pudding recipe cake, 1977; cookie, 1978; bran muffin, 1979)

Personal Care

Bar Soaps
Camay (1927)
Coast (1974)
#1-ivory (1879)
Kirk's (1930)
Lava (1928)
Safeguard (1963)
Zest (1952)

Deodorants/Anti-perspirants
Secret (1956)
Sure (1972)

Disposable Diapers
#1-Pampers (1961)
Luvs (1976)

Disposable Incontinent Briefs
Attends (1978)

Hand and Body Lotion
Wondra (1977)

Home Permanent
#1-Lilt (1949)

Mouthwash
Scope (1965)

Paper Tissue Products
Charmin (bathroom, 1957)
#1-Puffs (facial, 1960)
White Cloud (bathroom, 1958)

Paper Towels
#1-Bounty (1956)

Prescription Drugs

Shampoos
Head & Shoulders (1961)
Pert (1979)
Prell (1946)

Toothpastes
#1-Crest (1955)
Gleem (1952)

B. Industrial

Finished Industrial Goods

All-purpose cleaning products
Floor and hard-surface cleaning products
Pot and pan washing products
Cleansers
Commercial laundry products
Coin-vended laundry products
Hand-washing products
Institutional bar soaps
Coffee
Shortenings and oils
Surgical drapes and gowns

Unfinished Industrial Goods

Animal feed ingredients
Cellulose pulp
Fatty acids
Fatty alcohols
Glycerine
Methyl esters

Note: Test-market brands have been excluded.

[a] The date the brand became part of the P&G line is in parenthesis.

[b] Leading brand in the category is marked #1.

Exhibit 3 Divisional Line Management Organization

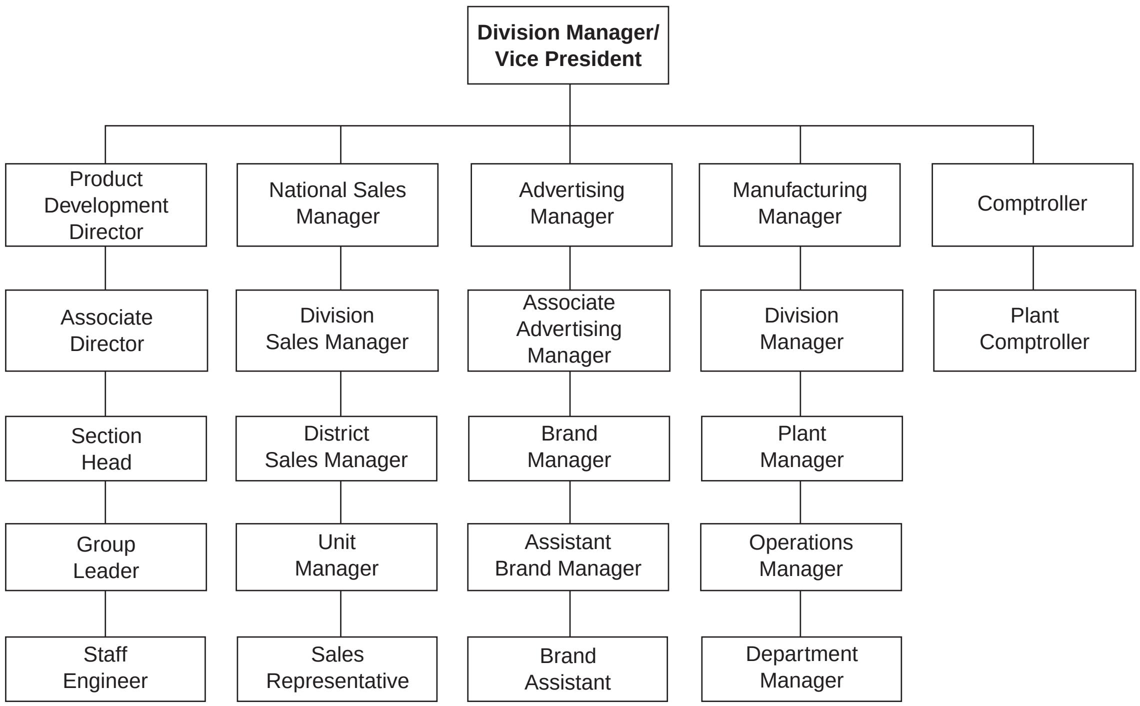


Exhibit 4 Marketing Plan Development Process

Appropriate Number of Weeks Before Plan Approved	Activity or Event	Purpose
12	**Business Review** Assistant Brand Manager thoroughly reviews brand's and major competition's past 12-month shipment and share results by region, by size, and by form. Key lessons learned and indicated actions for the brand are developed by analyzing influences on brand share, including advertising copy, media weight, promotion, trade merchandising (display, co-op advertising and temporary price reduction), pricing, and distribution.	To determine what elements of the marketing mix are affecting the brand's business and to develop clear guidelines and actions to improve business results.
8	**Competitive Forecast** Brand group forecasts competitive volume and marketing expenditures for coming year, using input from Sales and advertising agency.	To allow brands to gauge level of expenditures necessary to compete effectively.
6	**Preliminary Forecast** Brand Manager forecasts brand's volume and share for the coming year, and preliminarily recommends advertising and promotion expenditures.	To allow division and P&G management to preliminarily forecast total P&G volume, expenditures, and profits for the coming year, and the brand to get preliminary agreement to volume objectives and marketing plans.
4	**Promotion Review** Brand Assistant thoroughly reviews results of past 12-month promotion plan by region, event, promoted size, and total brand. The document incorporates Sales comments, competitive brand activity, and available research to explain possible reasons for success and failure. Plan includes broadscale effort and testing activities.	To gain preliminary agreement from Advertising and Sales management to the proposed promotion plan for the coming year.
4	**Media Plan** Advertising agency develops detailed media plan, working with Brand Manager and Assistant Brand Manager. Plan includes broadscale media effort and testing activities.	To develop media plan for inclusion in budget proposal.
1	**Budget Proposal** Brand group prepares document detailing proposed volume, share, and marketing plan for coming year. Marketing plan includes detailed media and promotion plans, both broadscale effort and testing activities.	To provide a written record of the proposed plan.
0 (March)	**Budget Meeting** Brand group and advertising agency present the proposed plan to P&G management. The plan can either be approved in full, conditionally accepted provided certain issues raised in the meeting are addressed, or not approved.	To gain management input and agreement to the proposed plans.

Exhibit 5 PS&D Division Organization Chart, Fall 1981

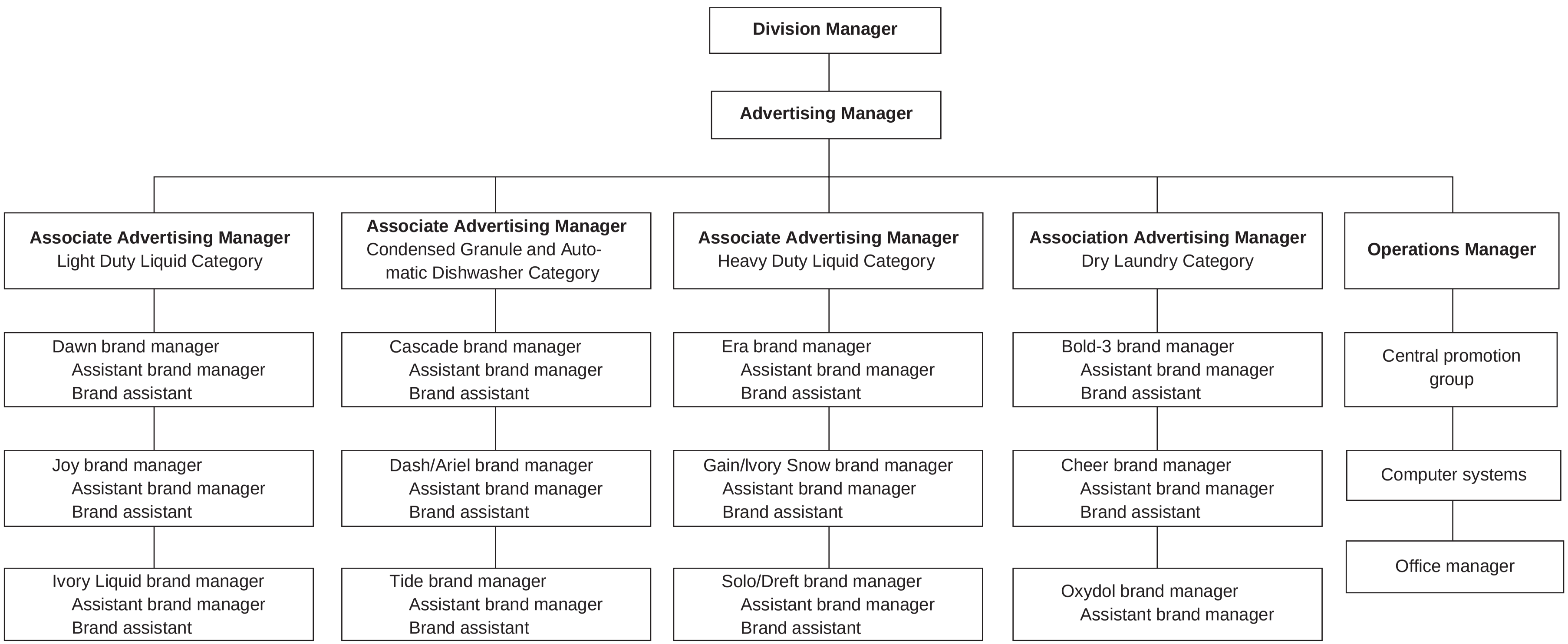


Exhibit 6 LDL Market Historic Growth Trends and Projections

		% of Category Volume		
Fiscal Year Ending June 30	**Volume (millions cases)**	**Mildness**	**Performance**	**Price**
A. Actual				
1973	56.4	44%	19%	37%
1974	57.0	45	20	35
1975	56.4	44	21	35
1976	56.8	43	22	35
1977	56.1	40	28	32
1978	57.8	40	30	30
1979	57.0	39	32	29
1980	58.7	38	33	29
1981	59.0	37%	35%	28%
B. Projected				
1982	59.4	37%	35%	28%
1983	59.8	36	35	29
1984	60.1	36	35	29
1985	60.8	35	36	29
1986	61.1	35%	36%	29%

Source: Company records.

Note: Classification and projections were based on collective brand manager judgment.

Exhibit 7 Attribute Importance Ratings

	% of Respondents							
Attribute[a]	6	5	4	3	2	1	No Answer	Average Rating
Makes dishes shine	64%	16%	7%	6%	2%	2%	3%	5.3%
Pleasant odor or perfume	40	17	11	10	7	10	5	4.2
Don't have to use much	70	13	6	5	1	2	3	5.5
Doesn't make skin rough	65	12	7	5	4	3	4	5.0
Is low-priced	50	19	10	9	3	4	5	5.0
Good for hand-washing laundry	29	14	9	11	9	23	5	3.7
Does a good job on pots and pans	75	13	4	2	1	1	4	5.6
Does not spot or streak glasses or dishes	67	15	8	3	2	2	3	5.4
Is mild to hands	68	13	5	5	3	3	3	5.2
Makes long-lasting suds	83	12	7	2	2	2	2	5.5
Cuts grease	87	6	2	1	–	1	3	5.8
Is economical to use	72	13	6	4	1	1	3	5.5
Soaks off baked-on or burnt-on food	60	17	7	5	2	4	5	5.2
Good for tough cleaning jobs	52%	13%	8%	9%	4%	9%	5%	4.8%

Source: Company research

[a] Respondents were asked to rate the importance to them of LDL attributes on a 6-point scale, with 6 being ''want the most" and 1 being ''want the least." To be read, for example: 64% of respondents claimed "Makes dishes shine" as one of the attributes they wanted most in a dishwashing liquid, while 2% of respondents claimed this attribute as the one they wanted least.

Exhibit 8 LDL Market Shares by Brand and Company (shares of statistical cases)

		Share of Market		
Brand	**Segment**	**1961**	**1971**	**1981**
P&G				
Joy	Performance	14.9%	12.0%	12.1
Ivory	Mildness	17.5	14.9	15.5
Dawn	Performance	—	—	14.1
Thrill[a]	Mildness/performance	—	2.9	—
		32.4	**29.8**	**41.7**
Lever Brothers				
Lux	Mildness	17.3	7.3	3.1
Dove	Mildness	—	4.8	3.1
Sunlight	Performance	—	—	0.7
All others	Price	5.9	1.0	—
		23.2	**13.1**	**6.9**
Colgate-Palmolive				
Palmolive Liquid	Mildness	—	11.7	11.8
Dermassage	Mildness	—	—	3.5
All others	Price/performance	5.5	9.6	8. 3
		5. 5	**21.3**	**23.6**
All other LDLs	Mainly price/generics and private labels	38.9	35.8	27.8
Total LDLs		100.0%	100.0%	100.0%

Source: Company records

[a] Thrill was introduced by P&G in 1969. The brand ultimately proved not to provide a needed product benefit and was discontinued in 1975 because of faltering volume.

Exhibit 9 Cost Structure for an Established LDL Brand

Cost of goods	51%
Distribution	7
Selling and general administration	10
Marketing expenditures	20[a]
Profit	12
Total	100%

Source: Company records

[a] Includes advertising, trade and consumer promotion expenditures.

Exhibit 10 LDL User / Non-User Attribute Association (%)

	Usual Brand[a]									
	Ivory Liquid		Joy		Dawn		Palmolive		Price Brands	
Attribute	**Yes**	**No**	**Yes**	**No**	**Yes**	**No**	**Yes**	**No**	**Yes**	**No**
Best for mildness	89%	51%	53%	12%	41%	7%	71%	27%	13%	2%
Best overall for getting dishes clean	64	9	78	14	88	15	61	5	18	1
Best for cutting grease	41	6	49	7	96	45	35	4	16	1
Best for removing tough, cooked-on foods	47	7	55	10	88	28	41	6	19	2
Best for leaving dishes shiny	44	10	81	45	59	5	40	4	14	1
Gives the best value for your money	74	24	60	4	65	6	55	5	40	7
Makes the longest-lasting suds	79	29	60	10	67	11	50	5	12	1
Has the most pleasant fragrance	43%	11%	64%	35%	39%	9%	35%	11%	14%	1%

Source: Company research

Note: Respondents were asked to indicate which one brand was best described by each attribute phrase. To be read, for example: 89% of respondents who claimed Ivory Liquid as their usual brand indicated that it was best for being mild to your hands; 51 % of people who did not claim Ivory Liquid as their usual brand indicated it was best for being mild to your hands.

[a] A *brand user* was defined as a respondent who reported that brand as the usual brand used over the previous three-month

Exhibit 11 Ivory Liquid's TV Storyboard "Mildness" Message, 1981

COMPTON ADVERTISING, INC.
625 Madison Avenue, New York, N.Y. 10022
Telephone: PLaza 4-1100

CLIENT: PROCTER & GAMBLE CO.
PRODUCT: IVORY LIQUID
TITLE: "STOKES"
COMML. # PGIL 5713 TIMING: 30 SECONDS
DATE: 10/22/80

1. (SFX: MUSIC)
ANNCR: (VO) Can you pick Jean Stokes' hands from her two daughters?

2. LISA: Mom's hands are as young-looking as ours!

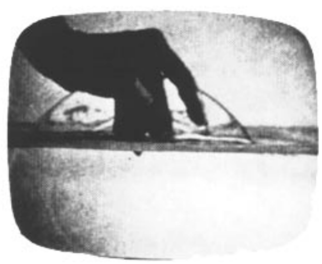
3. KATHY: We sing together for charity --

4. MOM: Strictly amateur -- but your hands get noticed.

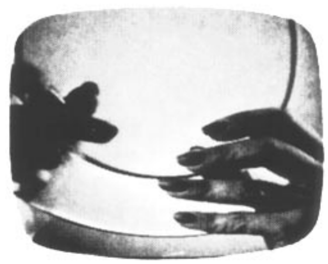
5. ANNCR: (VO) And Jean does a lot of dishes. What's her secret?

6. LISA: Ivory Liquid!
MOM: And I've told my girls how mild it is.

7. ANNCR: (VO) Lab tests show Ivory Liquid's



8. mildest of all leading brands.



9. And nothing gets dishes cleaner.

10. LISA: I'm going to stay with Ivory Liquid.

11. GROUP SINGS: Ivory Liquid.

12. ANNCR: (VO) Because young-looking hands are worth holding on to.

Exhibit 12 Ivory Liquid's TV Storyboard "Value" Message, 1981

COMPTON ADVERTISING, INC.
625 Madison Avenue, New York, N.Y. 10022
Telephone: PLaza 4-1100

CLIENT: PROCTER & GAMBLE CO.
PRODUCT: IVORY LIQUID
TITLE: "THE KIPPERS"
COMML. # PGIL 5573 **TIMING:** 30 SECONDS
DATE: 4/1/80

1. ANNCR: (VO) Is the Kippers' "bargain" brand a better buy than mild Ivory Liquid? Let's see...

2. INT: Let's test your brand against Ivory Liquid with a penny's worth of each.

3. Let's wash some dishes.

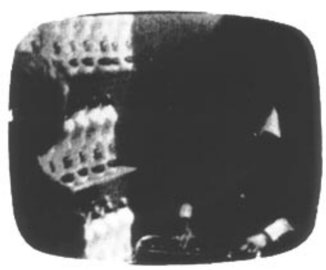
4. How are your suds?
BOB: I don't have any suds now.

5. INT: How about the Ivory Liquid Mrs. Kipper?
BEV: I still have a tubful.

6. INT: Let's scoop some up and compare.

7. Okay what happened?
BEV: I did a lot more dishes.

8. What I thought was a bargain isn't really a bargain at all. INT: What's the bargain?



9. INT: What's the bargain?
BEV: Ivory is the bargain.

10. It's gentle to my hands, and I can save money.

11. ANNCR: (VO) You don't have to give up

12. mild Ivory Liquid to save money.

Exhibit 13 1981 Dawn Advertising Storyboard

B&B

BENTON & BOWLES
909 THIRD AVENUE
NEW YORK, N.Y.
(212) 758-6200

Client: PROCTER & GAMBLE CO.
Product: DAWN
Length: 45 SECONDS (PGDN 6105)
Title: "SLEEPOVER REV/FP"

1. (SFX: KIDS TALKING) MOM: Lasagna? For breakfast? DAUGHTER: Oh, Mom! FRIEND: It's a slumber party!

2. MOM: O.K. But you <u>will</u> clean up.

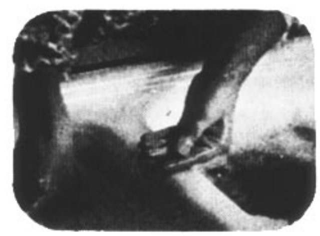
3. DAUGHTER: All that grease! Yuck!!! Gross!

4. MOM: No, Dawn.

5. DAUGHTER: Ah, finished!

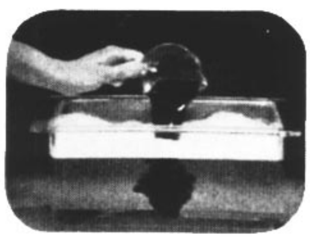
6. FRIEND #1: Uh-uh, forgot a glass. DAUGHTER: You forgot it. You wash it. FRIEND: After that greasy pan?

7. DAUGHTER: Try it. Dawn'll handle it.

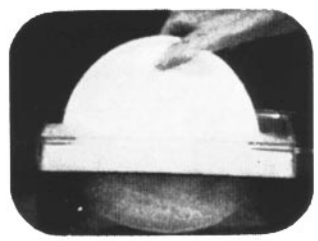


8. FRIEND #1: The wat doesn't feel greasy...an neither do my hands.

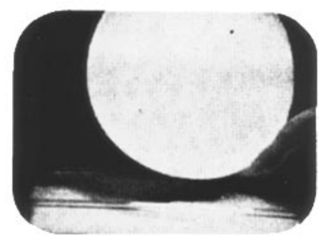
9. And this glass looks as good as the first one <u>you</u> washed.



10. ANNCR: (VO) Look. Add a half cup of grease to Dawn dishwater.



11. Dawn breaks up grease, takes it out of your way. Helps keep it away.



12. So dishes come out c

13. FRIEND: Dawn's great!

14. MOM: So, if lasagna's breakfast, what's dinner? DAUGHTER: Corn flakes. (GIRLS LAUGH)

15. ANNCR: (VO) Dawn takes grease

16. (SFX) out of your v

Exhibit 14 Current Product Usage (%)

	Ivory	Joy	Dawn
Usual brand	23%	13%	25%
Past 12-month trial	35	30	29
Ever tried	58%	43%	54%

Source: Company research

Note: An estimated 60%–80% of total brand volume was consumed by usual brand users for each brand.

Exhibit 15 1981 Joy Advertising Storyboard

Radio TV Reports

41 East 42nd Street New York N.Y. 10017
(212) 697-5100

PRODUCT: JOY DISHWASHING LIQUID
PROGRAM: AS THE WORLD TURNS
WCBS-TV

758077
60 SEC.
1:35PM

1. MAN: Sam. MAN: Joe. It's been too long.

2. MAN: It sure has. Come on in. Honey, Sam's here. WOMAN: How do you do Captain Randall.

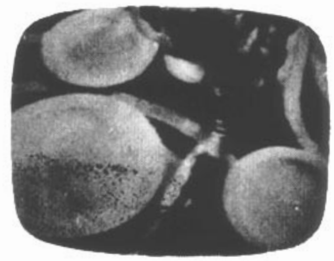
3. MAN: Major Randall now I hope my phone call didn't catch you two off guard. But Joe said, Sam if you're ever in town --

4. WOMAN: Well of course. And I hope you stay for dinner Major Randall. That is if you don't mind pot luck.

5. MAN: Oh, don't apologize. MAN: Sam. Make yourself at home. Honey, shouldn't we get out the good dishes?

6. WOMAN: Never mind the dishes. Ours here look fine. What about my dress? MAN: It's just fine.

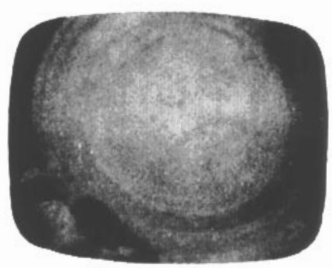
7. ANNCR: When unexpected guests drop in one thing you don't have to worry about is the way your table looks when you use Joy.



8. Joy cleans every day dishes clear down to the shine. And smells fresh like lemons.

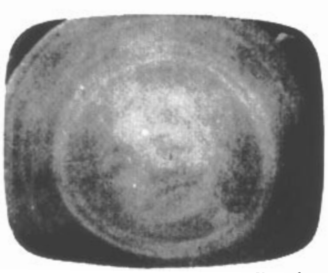
9. Keeps dishes ready for company, even if you're not.

10. MAN: Sure is nice to get home cooking.



11. And look at that shine. Looks like you were expecting company all the time.

12. ANNCR: Lemon fresh Joy cleans down to the shine.



13. And that's a nice reflection on you.

Exhibit 16 Shipment and Share Data for LDL Brands

	Factory Shipments (millions of cases)			Market Share (% of LDL category)		
	Ivory	**Dawn**	**Joy**	**Ivory**	**Dawn**	**Joy**
Actual						
1977	9.1	6.7	6.7	16.3%	11.9%	11.9%
1978	9.0	7.3	6.7	15.5	12.7	11.6
1979	9.1	7.5	6.8	16.0	13.2	12.0
1980	9.1	8.2	6.9	15.5	14.0	11.7
1981	9.1	8.3	7.1	15.5%	14.1%	12.1%
Estimated						
1982	9.2	8.7	7.2	15.5%	14.7%	12.2%
1983	9.3	9.0	7.4	15.5	15.0	12.3
1984	9.3	9.3	7.5	15.5	15.5	12.4
1985	9.4	9.7	7.6	15.5	15.9	12.5
1986	9.5	10.1	7.8	15.5%	16.5%	12.7%

Source: Company records

Note: Projections are based on each brand manager's judgment.

Exhibit 17 LDL-User Demographic Profile (% of total responding households)

			Usual Brand				
	Total LDL Households	Heavy LDL Users[a]	Ivory Liquid	Joy	Dawn	Palmolive	No Name/ Plain Label
ADW Usage—Past 7 Days							
Yes	36%	9%	48%	49%	51%	48%	47%
No	64	90	51	51	49	42	53
Yearly Income							
Under $15,000	32	46	28	32	35	30	36
$15,000–25,000	27	29	27	26	29	27	29
Over $25,000	41	25	45	42	36	43	35
Population Density (000/sq. mile)							
Under 50	32	39	30	33	38	28	20
50–1,999	45	40	45	44	43	46	48
2,000 and over	23	21	25	23	19	26	32
Geographic Area							
Northeast	22	26	22	23	19	24	36
North Central	28	28	26	27	31	27	31
South	33	35	34	37	35	33	16
West	17	11	18	13	15	16	17
Employment[b]							
Employed	48	37	48	50	49	49	55
Not employed	52	63	52	59	51	51	45
Age[b]							
Under 35	33	39	31	34	38	39	35
35–50	30	25	29	31	30	30	37
51–59	16	15	17	16	15	16	12
60+	21	30[c]	23	19	17	24	16
Number in Family							
1–2	40	41	43	38	38	42	28
3–4	44	41	42	45	46	44	50
5+	16%	18%	15%	17%	16%	14%	22%

Source: Company research

Note: To be read, for example: 48% of respondents who claimed Ivory Liquid as their usual brand had used an automatic dishwasher in the past seven days.

[a] Defined as +15 sinksful per week.

[b] Female head of household.

[c] The heavy LDL-user skew toward older respondents may be misleading. P&G management believed that, though users washed a large number of small sinkloads, they used a lesser amount of product per sinkload because they tended to live in smaller households.

Exhibit 18 LDL Category Assessment (4-week blind in-home use test of H-80 in 45 households)

	H-80 with Scrubbing Instructions[a]	Established Competitive LDL with Scrubbing Instructions[a]
Attribute Ratings (%)		
Overall	77	71
Cleaning	79	73
Removing baked/burned/dried-on food	73	61
Grease Removal	77	72
Amount of suds made	73	69
Mildness	55	63
Odor of product	70	68
Color of product	72	69
Favorable Comments (%)		
Unduplicated cleaning	73	65
Cleans well	36	29
Cleans hard-to-remove food	25	15
Cuts grease	34	32
Unduplicated sudsing	49	45
Product color	6	5
Mildness	25	34
Unduplicated odor	45	40
Unduplicated cap/container	8	2
Unduplicated consistency	12	2
Like scrubbing particles/abrasives	12	—
Unfavorable Comments (%)		
Unduplicated cleaning	4	9
Not clean well	—	1
Not clean hard-to-remove food	1	5
Not cut grease	3	8
Unduplicated sudsing	9	17
Product color	1	3
Mildness	16	14
Unduplicated odor	10	9
Unduplicated cap/container	2	2
Unduplicated consistency	12	1
Not like abrasive/gritty feel	11	1
Dishwashing Information		
Used product full strength for scrubbing	61	52
Used scrubbing implement for tough jobs	79	85

Source: Company research.

Note: To be read, for example: 77% of the 425 households who used H-80 rated it as 4 or above on a 5-point scale on overall performance.

[a] Unmarked bottles of H-80 were given to one of two representative samples of LDL users. The other sample group received unmarked bottles of an established competitive brand. Both brands were accompanied by instructions suggesting the product be diluted for general dishwashing but used full strength for tough dishwashing jobs.

Exhibit 19 Selected Research Data: Personal Feelings Concerning Dishwashing

	% of Consumers
1. What is the worst thing about doing dishes?	
The time it takes	24%
Having to do them	22
Cleaning pots and pans	15
Scrubbing/scouring	14
Cleaning greasy items	6
Hard on hands	4
2. What is the toughest dishwashing job?	
Removal of baked/burnt/fried/cooked foods	39
Removal of greasy foods	32
Cleaning of pots and pans	22
Cleaning of skillets	16
Cleaning of casseroles	7
Cleaning of dishes	3
3. What is most disappointing about your current dishwashing liquid?	
Nothing	51
Suds disappear	12
Leaves grease	8
Odor	6
Hard on hands	2
Price/expensive	4
Have to use too much	4
4. What improvement do you want the most in a dishwashing liquid?	
Milder to hands	11
Do it by magic/itself	10
Eliminate scouring or soaking	9
Cut grease	9
Soak dishes clean	9
Suds never vanish	6
Nothing/satisfied	9%

Source: Company research.