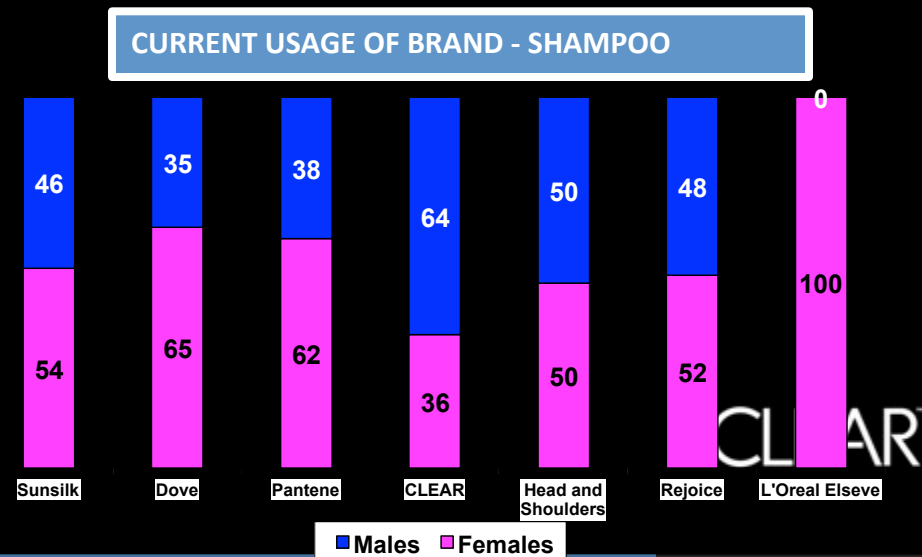
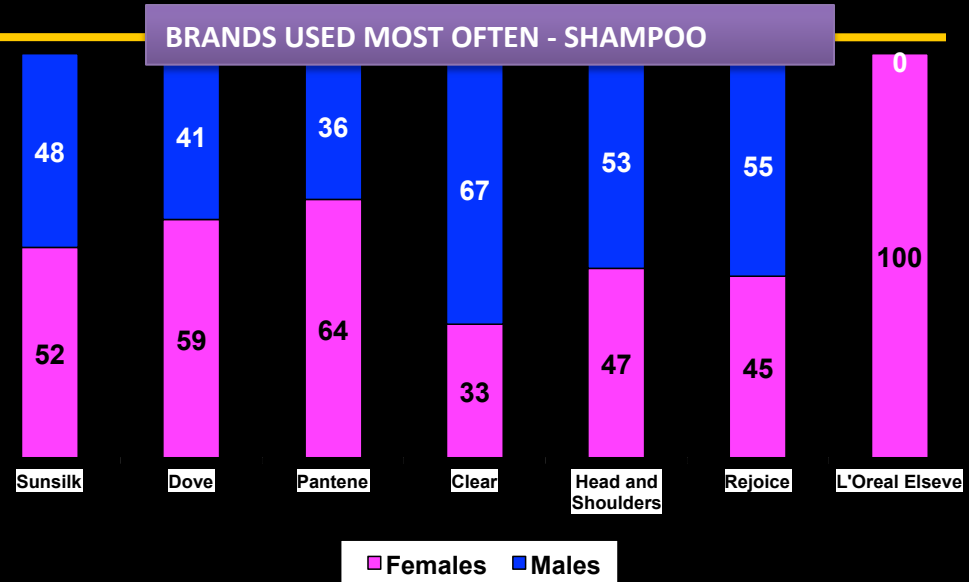


CLEAR MEN BRIEF

MARCH 2012

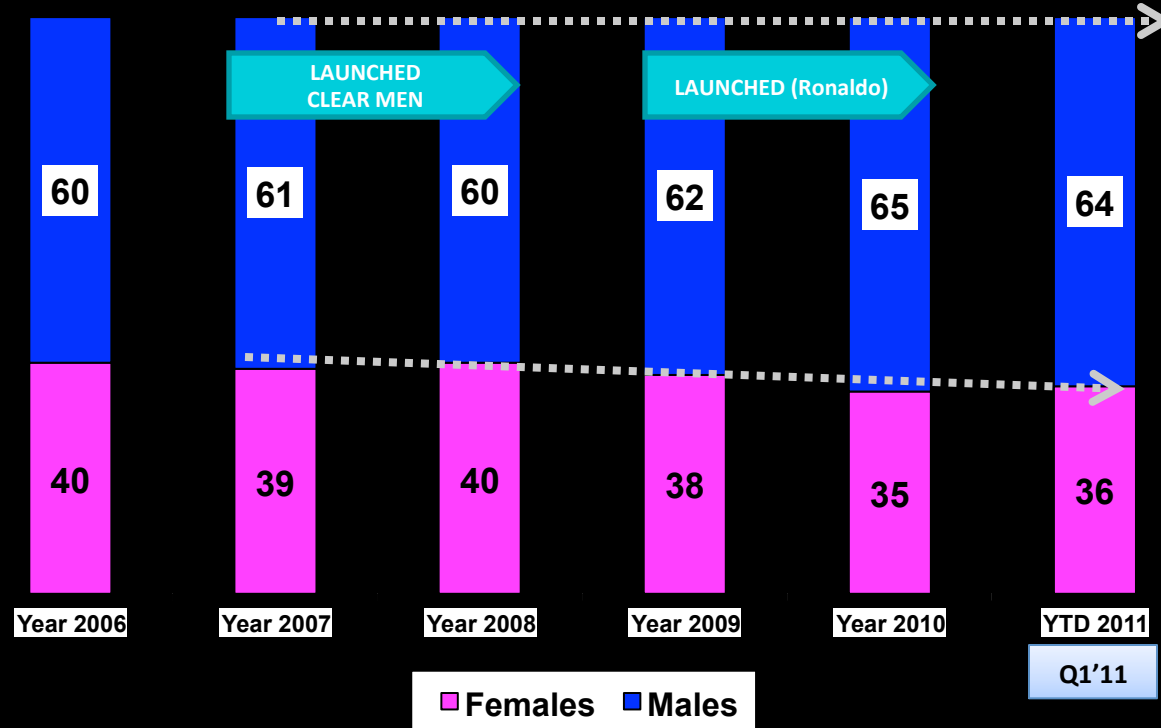
Shampoo brand usership by gender

- User base of beauty shampoo brands (SSK, Dove, PT) is dominated by women, while that of Clear and H&S are dominated by men.



Clear usership by gender over time

- Male usership contribution to Clear has increased over time since the launch of Clear Men



With Cosmo.....Clear Portfolio changes from Unisex focus to more Women

PRE-COSMO



COSMO



EAR

CLEAR ARCHITECTURE

UNISEX

Women

Men

Ice Cool
Menthol

Complete Soft
Care 2in1

Anti
Hair Fall

Dry Scalp &
Itch Control

Dry &
Damage

Smooth &
Manageable

Cool Sport
Menthol

Anti
Hair Fall

Cooling Itch
Control

Shampoo



Hair Con



3rd Step



Clear Variant usership by gender

- Men are more inclined to use Clear Ice Cool / Clear Men, while the same is true for women in Clear Complete Soft Care.
- Other variants of Clear are still 50:50 usership by gender

CURRENT USAGE OF CLEAR BY VARIANT - SHAMPOO

DATA PERIOD: 28 MAR – 3 JULY 2011 GTS

	Clear Complete Soft Care	Clear Anti Hairfall	Clear Ice Cool Menthol	Clear Dry Scalp and Itch Control	Clear Dry and Damage Repair	Clear Smooth and Manageable	CLEAR MALE
Females	60 %	50 %	38 %	50 %	50 %	50 %	-
Males	40 %	50 %	63 %	50 %	50 %	50 %	100 %

CLEAR

What did Clear Men do in the past?

- Focusing on Clear Men's key brand attributes in Anti-Dandruff (AD), Scalp Care Expert and Designed to suit men's need



CLEAR

What did Clear Men do in the past?

- Specific Clear Men Campaign (TVC and BTL activity) leading by Ronaldo



What did Clear Men do in the past?

- Using Dual Gender Communication and adding Clear Men in Ice Cool Communication to raise awareness of Clear Men existence



CLEAR

TVCs

CLEAR



Censor 2007 (launch)



Rain 2008



Ronaldo 2009



Sun 2010



Heat Wave (Ice Cool) 2010



Couple 2010



FF 2011



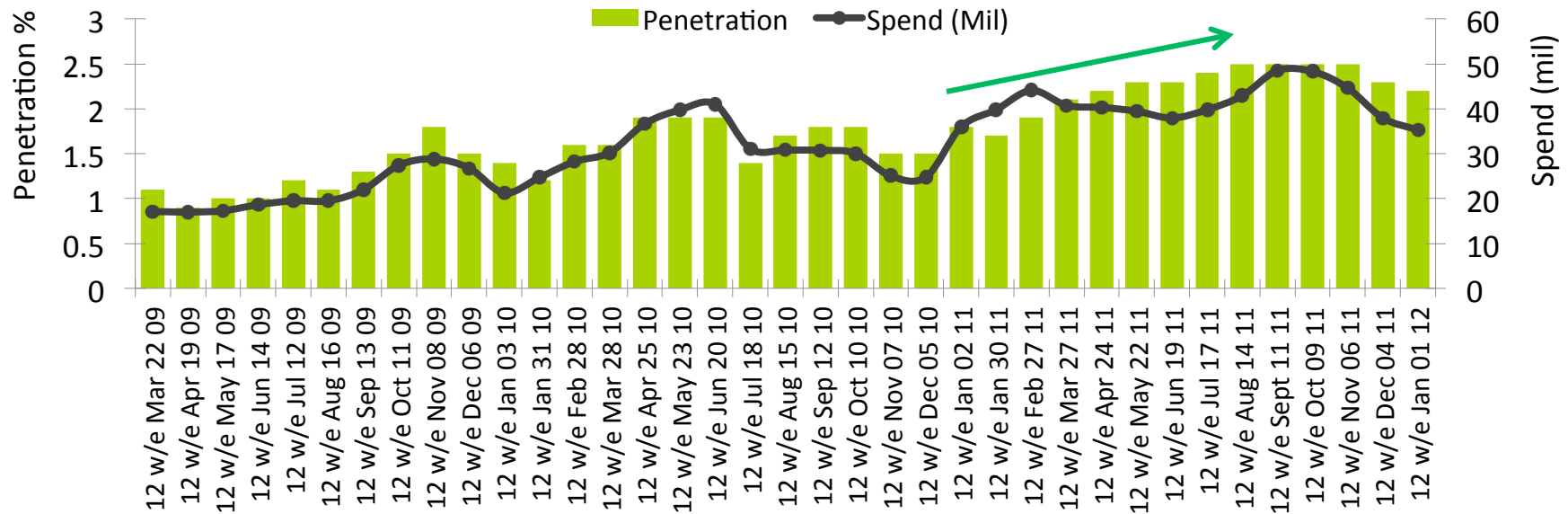
Proof 2011



Couple 2011

Clear Men penetration grows continuously, however, at a slower pace than expected.

Clear Men

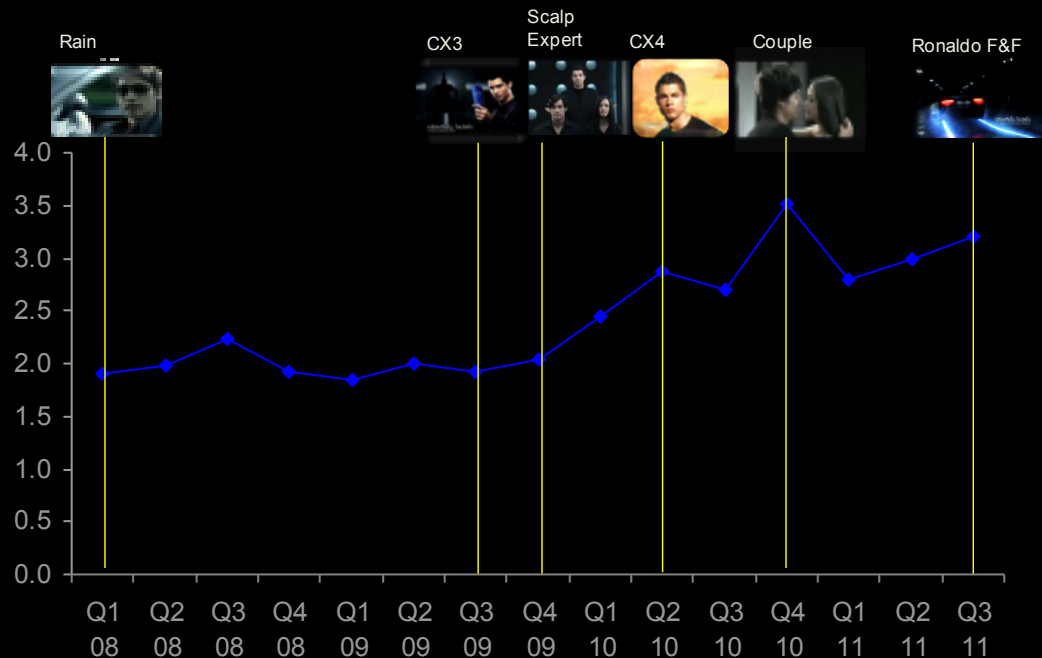
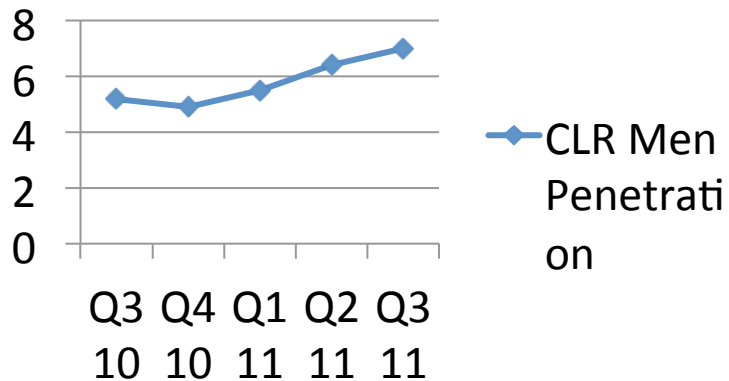


HOWEVER CLEAR MEN IS UNDERPERFORMING

CLR Men penetration has improving since 2011 MDM (CMI project)
- However, not at satisfying rate

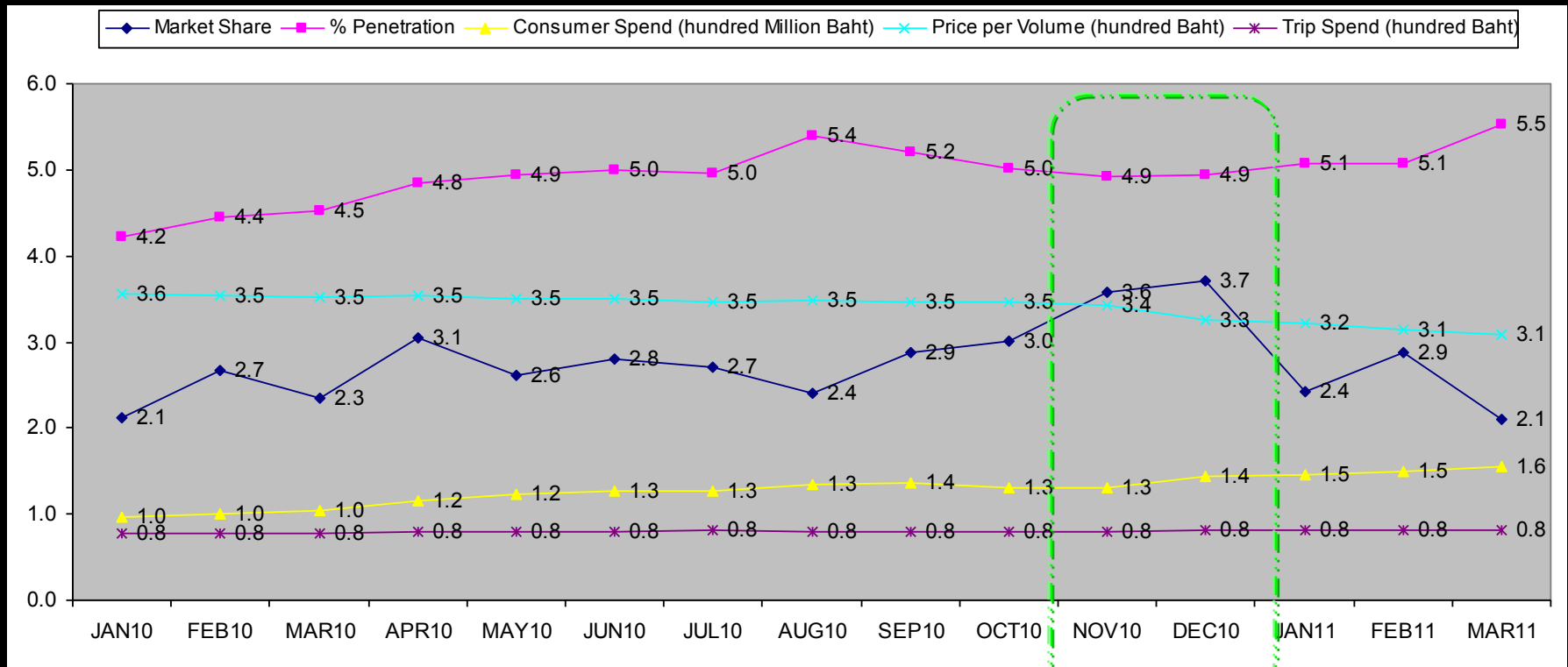
Market Share in TH is not growing in line with expectations

CLR Men Penetration



CLEAR

Clear Men Performance 2010-2011



Analysis

- Clear Men show a small and consistency growth rate in penetration and spending since 2010
- While trip spend remain stable since 2010
- TVC and BTL activity that's only for men can drive market share only in a short period of time (after campaign end share drop back to normal)
- Total brand activation (i.e. Couple) can help boost Clear Men market share significantly



South TVC
1Apr - 14May
(15 secs)
(1,400 GRPs)



Check Point TVC
1 May - 31 Aug
(30 secs)
(1,724 GRPs)



Raffle Campaign
(World Cup Tour)
1Apr - 15May



Check Point Launch Event
(Sky Kick)
11Jun - 11Jul



Cyclone TVC
1 May - 31 Jul
(30 secs)
(1,909 GRPs)



Cyclone TVC
1Sep - 30Oct
(30 secs)
(551 GRPs)



Couple TVC
22Oct - 31Dec
(30 secs)
(2,783 GRPs)



Check Point TVC
1Jan - 14Feb
(30 secs)
(1,200 GRPs)



Check Point TVC
15Feb - 19Apr
(15secs)
(1,245 GRPs)



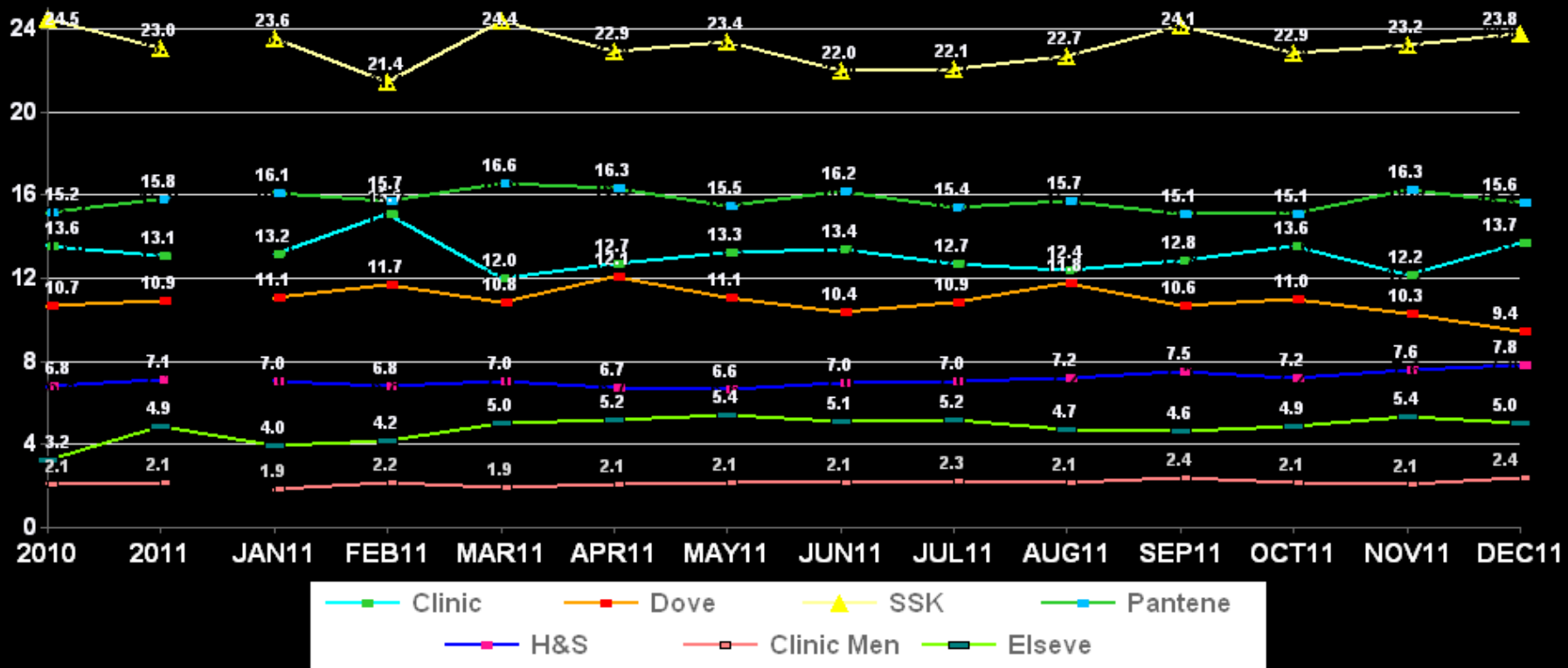
Clear Men Investigation
Education Campaign
1Feb - 31Mar



Booth Activity
with Sampling
Thai Premier League
1Feb - 31Dec

Market Share by Brands

Total Thailand - Value % Share



Clear Men grew continuously, however, at slow rate

	<u>SHARE</u>		<u>CONTRIBUTION</u>	
	<u>2010</u>	<u>2011</u>	<u>2010</u>	<u>2011</u>
<u>Total Clear</u>	13.6	→ 13.1		
Unisex	9.6	→ 4.6	71%	36%
Women	1.6	→ 6.1	12%	46%
Men	2.3	→ 2.4	17%	18%

Value Share	Value % Share (Total Hair Care)				Variant Contribution (Total Clear)			
	2010	2011	2011 Jan-Mar (Pre-RL)	2011 Apr-Dec	2010	2011	2011 Jan-Mar (Pre-RL)	2011 Apr-Dec
Ice Cool	5.0	4.4	4.7	4.3	37%	34%	36%	33%
Clean & Itch Control/Dry Scalp & Itch Control	1.0	0.8	1.0	0.8	7%	6%	7%	6%
Complete Soft Care	1.8	1.8	1.9	1.7	14%	14%	14%	14%
Hair Fall Defense/Anti Hair Fall	1.5	1.6	1.5	1.7	11%	12%	11%	13%
Scalp Oil Control (Pre-Cosmo)	0.1	0.1	0.1	NA	1%	0%	0%	0%
Smooth & Manageable (Cosmo)	NA	0.3	NA	0.4	NA	2%	NA	3%
Dry & Damage Repair	1.5	1.3	1.6	1.1	11%	10%	12%	9%
Men Clean X-Treme (Pre-Cosmo)	0.4	0.1	0.3	0.0	3%	1%	2%	0%
Men Cool Sport	1.3	1.5	1.3	1.5	10%	11%	10%	12%
Men Hair Fall Decrease/Men Anti Hair Fall	0.4	0.4	0.4	0.4	3%	3%	3%	3%
Men Cooling Itch Control (Cosmo)	NA	0.2	NA	0.3	NA	2%	NA	2%
Others	0.6	0.7	0.7	0.7	3%	5%	5%	5%
Total Clear	13.6	13.1	13.4	13.0	100%	100%	100%	100%

SUMMARY

Analysis

- Clear Men show a slightly growth rate in penetration from 4.2 in Jan'10 to 7.5% in Jan'12 (+3.3%)
- Specific Clear Men Campaign (TVC and BTL activity , leading by Ronaldo, could drive market share only in a short period of time (after campaign end share drop back to normal), but could not sustain the momentum or recruit new male users.
- Total brand activation (i.e. Couple & Ice Cool communication) can actually helped boost up Clear Men market share significantly by 80 bps from 2.9% (Sept'10) to its peak at 3.7% (Dec'10), much higher than Ronaldo campaign which share showed slight decline from 2.6% (May'10) to 2.4% (Aug'10)
- From Brand Health Check, Clear men is losing the relevancy level .**Need to strengthen the product proposition and create relevancy by trigger men to have needs for using male shampoo**
- Ronaldo helped mainly build brand image, but could not convey the reason to buy male shampoo and have much lower brand recall than Clear women and Avg Clear score.

Our Challenge?

Get MALE USERS to use CLEAR MEN

Target Consumer

Men / Age 18-35 Yrs / LSM 7-12 / Live in GBKK and Urban UPC

Main Target

High School



Do everything to entrance to University
Excite that it's 1st time in their life to have long Hair
Excite in opposite sex (want to have girl friend)

University



1st time to stay out from family (Dorm)
1st time have to buy personal care product themselves
Looks is very important since make them get girl and confident

2nd Target

1st Jobber



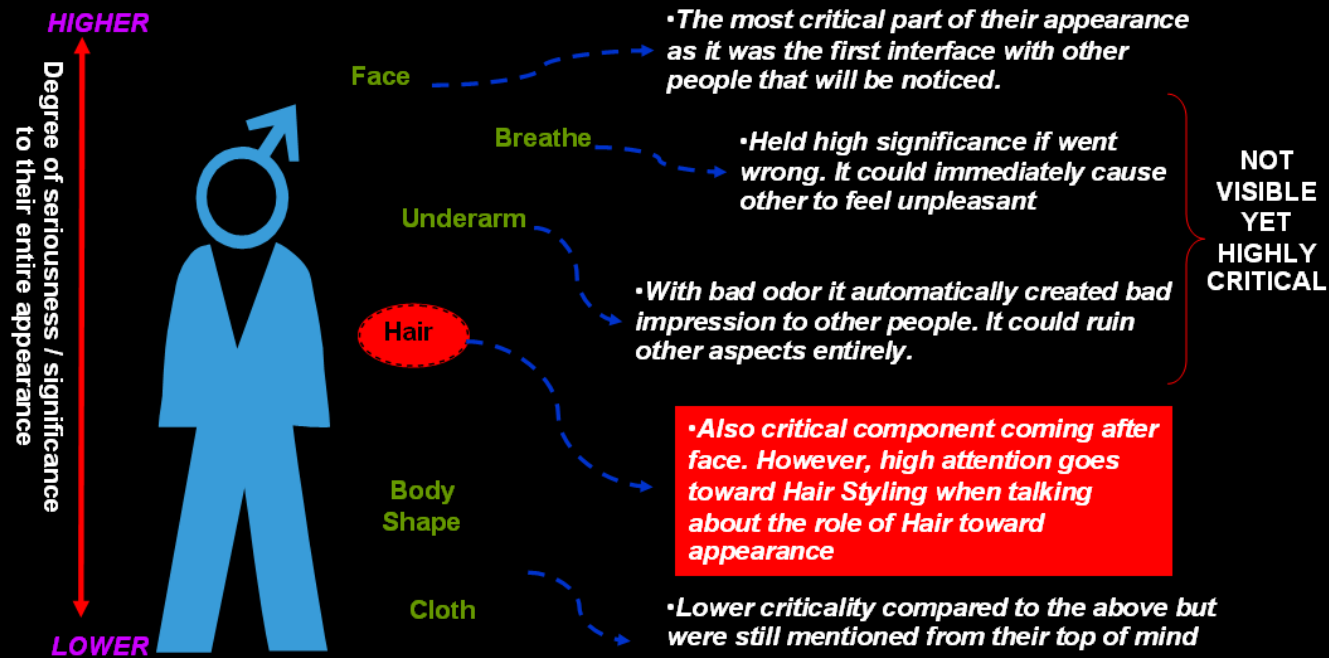
Start to move out from family (Condominium)
Need to buy personal care product themselves
Looks is very important since it's effect their career

Working Adult



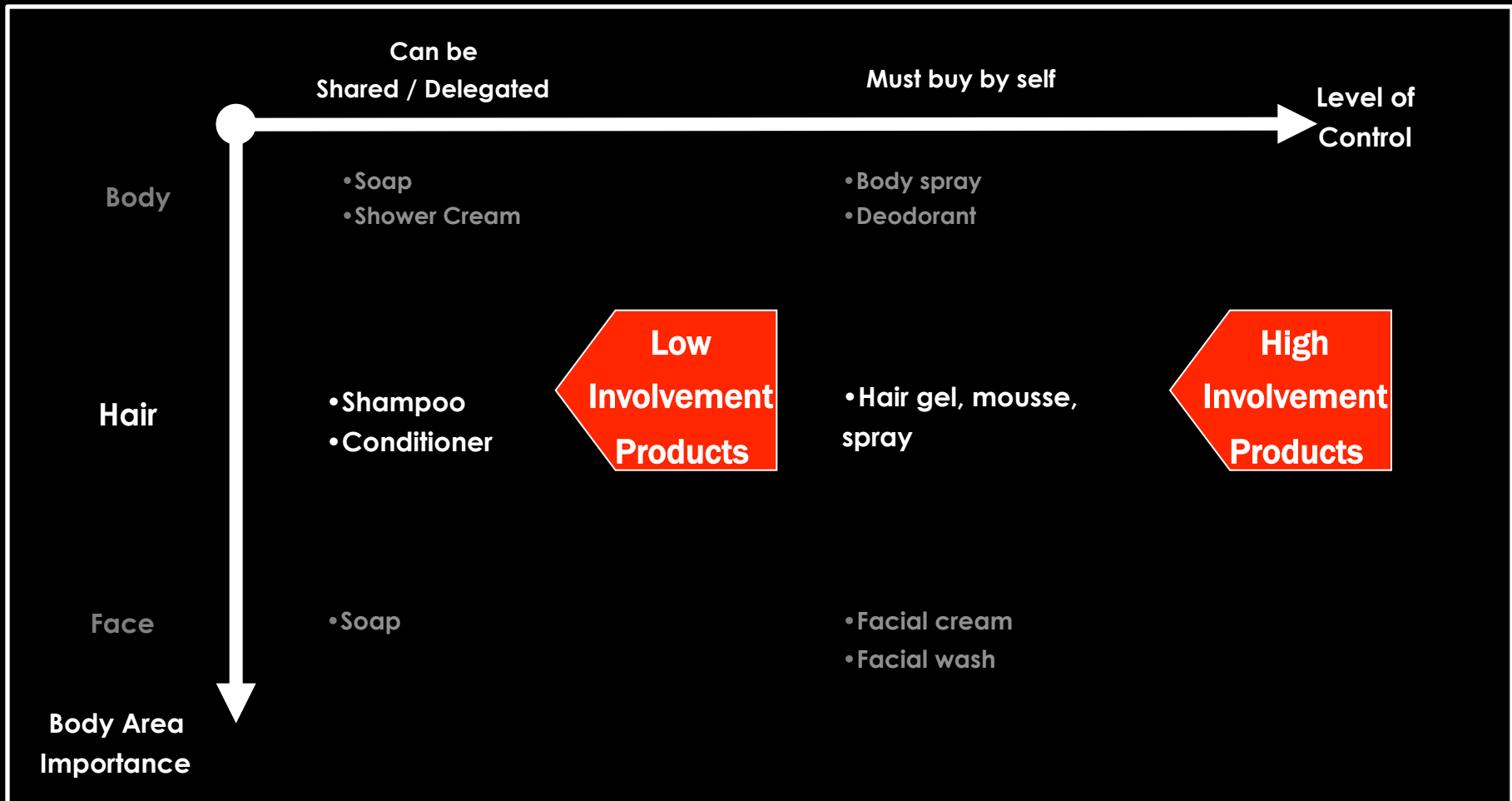
Married
Let's their wife buy personal care product for them
Hair fall become their big concern

Men consider hair as a critical component for appearance But only for Hairstyling not Shampoo



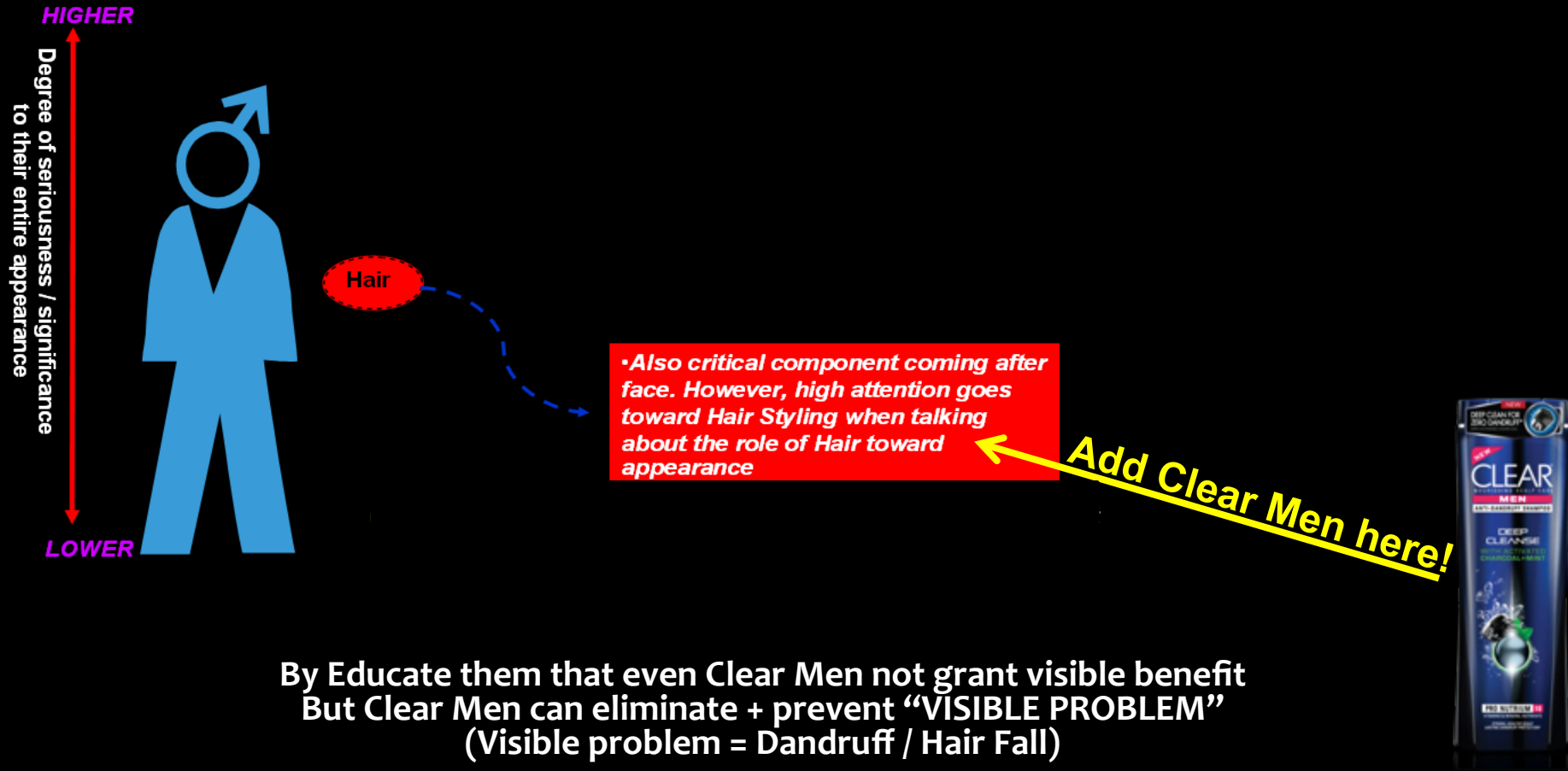
The reason is, Men care only “Visible benefit”
Styling can give them visible benefit (Good Hairstyle = Good Looking)
While Shampoo is considered for washing only

**Men consider Shampoo as a low involvement product
In contrast consider Hair Styling as a high involvement product**



So, They can use any shampoo available in their restroom / use same shampoo with family

Make Clear Men become critical component for Men appearance



Men's Appearance = Hair Cut + Hair Styling + No Visible Problem

Move Clear Men to High Involvement Product

Men have to use Clear Men, Not ordinary shampoo shared with their family



Objective: to educate men that male scalp are different from female and tease male consumer to notice that using female shampoo is embarrassed and can't answer the need of male different scalp.

4 TVC Scoops

Scoop : CMI team going to challenge men consumer in various place about what shampoo they use.

1



@Pub

2



@Super Market

3



@Thai Premier League Stadium

4



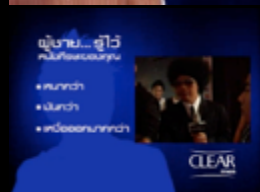
3 Key Scenes



Ask what shampoo you use?
+ Smell scene (Smell women fragrance on head)



Scene show that use female shampoo
and smell like female shampoo are wrong



Communicate the different between men scalp
vs women

