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## Dove Beauty Bar

### EXECUTIVE SUMMARY

In November 1991, Dove launched a pre-emptive strike against the anticipated Canadian launch of P&G's Oil of Olay bar. Dove's only weapon was dramatic new advertising. There was no product improvement; no increased ad spending; no significant change in trade and promotion spending; little pricing change; and no change in distribution.

Over the next four years, Dove's dollar share jumped from 15.7% to 23.4%. This eclipsed Ivory, which fell from 15.2% to 11.9%. Olay, which finally launched in 1995, managed only 3.5% after a full year. And Jergens, Dove's other main competitor, lingered on at 5%.

Dove's sales averaged double-digit growth each year; so that by 1995 they were up 73% on 1991. And all this took place with a premium-priced brand in a mature market in a recessionary economy.

The advertising campaign started as a pre-emptive tactical strike, and quickly became a long-term strategic attack – not only against the (as yet absent) Oil of Olay bar, but also against P&G's Ivory, and bars like Jergens. It became one of the most successful examples of brand-building in Canadian personal care history, and Lever and Ogilvy & Mather exported the launch advertising to 34 countries. We are calling the story:

### 'How Dove Pre-empted Mildness'

### SITUATION ANALYSIS

Dove launched in Canada in 1964, and was unmatched by any competitor in the personal wash market. Dove is not technically a soap, and its unique, patented formula was the first to help lock in moisture. For years, Dove had said 'can't dry your skin the way soap can', with the famous pour shot to show that Dove contains 1/4 moisturizing cream.

By 1990, Dove had reached the #1 dollar share in personal wash bars, neck and neck with Ivory at 15%. Dove sold at around 75¢ for 100 grams; close to a 50% premium to mainstream soaps, and more than double the price of Ivory and Jergens. Not surprisingly, Dove was profitable.

*'The market was mature and stable. Dove had been growing with a long-running testimonial TV campaign – showing women taking the Dove 7-Day Test – but the business was showing signs of flattening out. Ivory was essentially stable, with the long-running 'Ivory Girl' campaign. Jergens was unadvertised. But all this was about to change.....'*

In November 1990, P&G launched Oil of Olay bar in a Columbus, Ohio test market. Olay was an excellent product – superior to soaps, and similar to Dove in moisturizing and cleansing. It had the trusted skin-care heritage of Oil of Olay, and the advertising seemed to take direct aim at the Dove user.

Dove is one of Lever's crown jewels, and this was a severe threat. We calculated that there was a window of about 18 months before Olay would potentially come to Canada. What should we do?

## Business Strategy

Dove's best defense was to increase share of market (easier said than done) and create an environment that would make it difficult for Olay to convert Dove consumers. But how?

We considered various options. We could wait until Olay arrived, and counter-attack. But that seemed risky, and in any event, we were not prepared to let them get a foothold. We needed a pre-emptive strike.<sup>1</sup>

Based on the Columbus test-market, we could expect Olay in Canada to price at parity to Dove. Was price worth considering? It was quickly ruled out. A reduction deep enough to deter Olay would hurt Dove, possibly in image, and certainly in the pocket book. In any event, a price cut would attract the price switcher. With similar thinking, we ruled out increased promotion and trade spending – we did not want to 'buy' the business.

Would a 'new and improved' Dove head-off Olay? Possibly, but bringing such a product to market had cost, feasibility and timing drawbacks.

We considered stoking up spending behind the 7-Day Test campaign. But we examined the effect of spending increases in the past; and concluded that a heavy-up would not do the job. We were left with one option:

### **Dramatic new advertising.**<sup>2</sup>

## Creative Strategy

The decision to change campaigns was not taken lightly. Lever and O&M believe in long-running campaigns, and the 7-Day Test had built Dove in Canada and the US. Special circumstances need special thinking, however, because the 7-Day Test would not deliver the aggressive advertising objective:

1. Position Dove as the best bar, to attract occasional and non-users
2. Reaffirm Dove's superiority with existing users

At this point, we were still thinking tactically. We wanted to shake up the market; build Dove's business; and return to the 7-Day Test or something similar—all within the year. But to do this we needed news.

We had no 'new and improved' product to work with, but the answer started to take shape. We knew that mildness was a consumer hotbutton, and that Dove's superior formulation was milder than existing bars. Plus, because of its formula, Dove had an amazing product demonstration:

*'With a litmus-type test, conventional soaps turned indicator-paper dark, because of alkalinity. It stayed completely clear with Dove. This was a breakthrough demo, even with no product improvement.'*<sup>3</sup>

Within client and agency, this thinking was controversial on two counts:

- a) Moving away from the 7-Day Test campaign.

There were those who warned against replacing a successful long-running campaign, even tactically. They said that brand values would erode. We countered that Dove's entrenched, positive image could easily withstand the change; that far from being eroded, brand values would be enhanced by the dramatic news.

- b) Shifting to mildness – Ivory's strength.<sup>4</sup>

Dove had built its business by promising softer smoother skin, anchored by moisturizing and non-drying. Ivory stood for purity and mildness. Was it right, even tactically, to shift from our high ground to Ivory's? It was a fair question. Our

reasoning was (a) mildness was a consumer hotbutton (b) we had breakthrough mildness news, regardless of any other brand's positioning (c) although Dove had never claimed superior mildness, it was entirely consistent with Dove's image.

The decision was taken. We would pre-empt mildness, using the 'litmus' demo. We also decided tonality – scrupulously objective and credible. The demo had to speak for itself.

## **No Longer a Tactical Strike <sup>5</sup>**

Creative ran nationally in English and French, starting with 'Litmus'. Business responded so dramatically that we kept postponing the return to 7-Day testimonials. Our objective was still to pre-empt Oil of Olay bar, but we were now turning our attention to Ivory and Jergens. What had started as a tactical strike was becoming a strategic offensive. Over the next four years, creative rolled out in three phases, with mildness and credibility the strategic constants. There were five commercials, and corresponding print:

Phase One	'Litmus'	Nov 91 – Sept 92
Phase Two	'Focus Group' 'Joe Furrier'	Oct 92 – Apr 94
Phase Three	'Flex Wash' 'Arm Wash'	May 94 – Nov 95

The format of the commercials is worth comment. Many campaigns evolve by pooling out a format. Dove did not. All executions had the same strategy – mildness and credibility – but the format changed to suit the story.<sup>6</sup> 'Litmus' was 30 seconds of demo. 'Focus Group' was real women. 'Joe Furrier' was an expert testimonial. 'Flex Wash' and 'Arm Wash' were demos again, though different from 'Litmus'. And as the campaign evolved, the business kept growing.

## **Creative Evolution (English and French)**

### **Phase One 'Litmus' :30 Nov 91 – Sept 92**

This was a dramatic :30 second demo. Indicator (litmus) paper showed that a household cleaner – highly alkaline – turned the paper dark blue. Pure distilled water left it clear. Then the paper was touched to various brands. It turned dark blue with all the soaps, but on Dove it stayed clear. The final super quietly appeared: Dove is Mildest. Bar None.

Great care was taken with tonality. There was no oversell. No voice-over announcer. Copy was minimalist, via full-screen supers. Music was scored to reflect scrupulous objectivity. All the brands were named.<sup>7</sup>

Meanwhile, double-page magazine ads told the same litmus story, with similar tonality, but in more detail.

### **Phase Two: 'Focus Group :30' and 'Joe Furrier :30' Oct 92 – April 94**

After a year of 'Litmus' we brought in real women. We put non-users in a focus group setting, and filmed their reactions to the litmus test. They reacted as only real people can. We knew we were onto something when one woman said: 'I don't want to be an Ivory girl anymore. I want to be a Dove girl now.'

With 'Joe Furrier' we shifted to an expert testimonial. Joe Furrier was the scientist who had helped develop Dove in the 50s – he was credibility personified.

### **Phase Three: 'Flex Wash :30' May 94 – November 94 'Arm Wash: 30' July 95 – November 95**

By now, business was humming, and we decided to go back to an objective demo as proof of mildness. The Flex Wash is a standardized laboratory test for skin irritation. It showed Dove versus regular soap – rubbed for

60 seconds directly onto each arm with a moist sponge – three times a day for three days. The soap side showed redness.

For 1995 we created 'Arm Wash', rubbing moistened bars directly onto the skin. The arm washed with regular soap showed redness, while the arm washed with Dove was hardly disturbed.

## RESULTS

We've all heard the question 'How's the campaign doing?' and the answer 'It's too early to tell.' Not this time:

*'It was amazing. Business took off almost as soon as 'Litmus' went on air. Within weeks, we were getting out-of-stock calls from the trade, and when the first ISLs came in, we saw why. We had never seen advertising make share go up like this in a mature market.'*

The campaign started in November 1991, and Dove's dollar share grew from 15.7% in 1991 to 23.4% in 1995 (see [Figure 1](#)). This is the highest share for any market in which Dove competes around the world. Dollar sales for the same period grew 73%; unprecedented in a mature market. And the core features of the launch campaign were exported to 34 countries (see [Figure 2](#)).

### Effect on Ivory and Jergens

As Dove grew, Ivory declined from 15.2% to 11.9% – to less than half of Dove. Jergens fluctuated in the 5% range, probably sustained by low price (see later). Ivory's decline is significant given Dove's shift to mildness. We do not have brand switching data, but it seems that Dove did pre-empt mildness, as we had intended. Ivory countered by putting more advertising emphasis on mildness, but share did not seem to respond (see [Figure 3](#)).

### Oil of Olay Bar

Olay finally arrived in Canada in November 1995, but by the end of 1996 had only a 3.5% dollar share. Dove returned to testimonial advertising (radically different from the 7-Day Test) in 1996, and share has continued to grow. It was 24.2% for 1996.

## ISOLATING ADVERTISING AS THE VARIABLE

We did not have tracking or market modeling, but it seems inescapable that the creative was driving the business.

### Clucas Testing

We tested 'Litmus' and 'Flex Wash' with users and non-users via this quantitative technique. Both commercials were highly effective delivering the strategic benefit – mildness – and ratings for Product, Sales, and Brand Recall all above the norms.

**TABLE 1**

	<b>Norm</b>	<b>'Litmus'</b>	<b>'FlexWash'</b>
Mildness	n/a	68%	72%
Superiority			
Product Rating	51	63	61
Sales Rating	43	49	48
Brand Recall	79	97	86

Source: J. E. Clucas and Associates

## Enhancing, not Detracting

In the Clucas research users and non-users rated Dove best for superior mildness (new strategy) and softer, smoother skin (long-standing strategy). This was even though 'Litmus' and 'Flex Wash' did not show a woman's face or the 1/4 moisturizing shot – vindicating our faith in the strength of Dove's image.

## Media Spending

Dove's growth was not driven by media spending. It stayed flat, and even declined in 1995. Ivory's spending stayed competitive, averaging about 80% of Dove's, and even overtaking Dove for 1993. Total category spending did decline, evidently because of the recessionary economy. This increased Dove's share of voice a few percentage points over the four years of the case, but not at all to a degree that would cause Dove's growth.

**TABLE 2: BAR  
SOAP MEDIA  
SPENDING (\$000)**

	1991	1992	1993	1994	1995
Dove	2,202	2,387	2,289	2,236	1,639
Ivory	1,849	1,632	2,532	1,690	1,358
Average all Bars	10,600	9,819	9,698	7,951	6,220
Dove SOV	21%	24%	24%	28%	26%

Source: A.C. Nielsen.

## Pricing, Sales Promotion, Trade Spending, Merchandising, Distribution

Average pricing measured by ISL reflects not only list pricing, but the effect of sales promotion and trade spending. If anything, Dove's pricing increased relative to Ivory and Jergens and bars in general.

**TABLE 3:  
AVERAGE PRICE  
PAID PER 100  
GRAMS**

	1991	1992	1993	1994	1995
Dove	.76	.81	.90	.87	.87
Ivory	.36	.35	.35	.35	.36
Jergens	.30	.29	.29	.30	.29
Average all Bars	.55	.55	.57	.59	.60
Dove vs Ivory	211	231	257	248	242

Source: ISL Personal Wash Share Report 1991-1995

Finally, in a mature market, in-store merchandising and distribution were basically unchanged over the life of the campaign.

## CONCLUSION

This campaign reflects a number of decisions that broke new ground.

- Launching a pre-emptive strike.
- Replacing a campaign (7-Day Test) that had been a long-running success.
- Finding gripping news ('Litmus') without a product improvement.
- Changing creative strategy from Dove's strength – moisturizing and non-drying – to Ivory's strength – mildness.
- Shifting a tactical strike to a long-term strategy as results came in.
- Building a long-term campaign with very different executions; though all to the same strategy.

This is a remarkable example of how to take advantage of a strong brand image. It also shows (as do a number of other cases) that conventional wisdom may not be as wise as we think.

Some cases included a summary of major awards won. The 'Litmus' TV won Golds at the Marketing Awards and the Bessies, and the top award in its category – the Clio statue – at the Clios. Internationally, it won a bronze lion at Cannes. It also appears in the One Show Annual, and the Communication Arts Annual (as does the launch print.)

## ENDNOTES

1. Launching a pre-emptive strike.
2. Replacing a successful long-running campaign.
3. Digging for Insight. Discovering 'litmus'.
4. Breaking conventions. Taking on a competitor's positioning. Compare Claritin, which re-invented non-drowsiness; and Sunfire, which pre-empted performance.
5. Opportunism. Evolving a tactical move into a long-term strategy.
6. Building a campaign with very different executions. Compare Buckley's.
7. Naming the competition.

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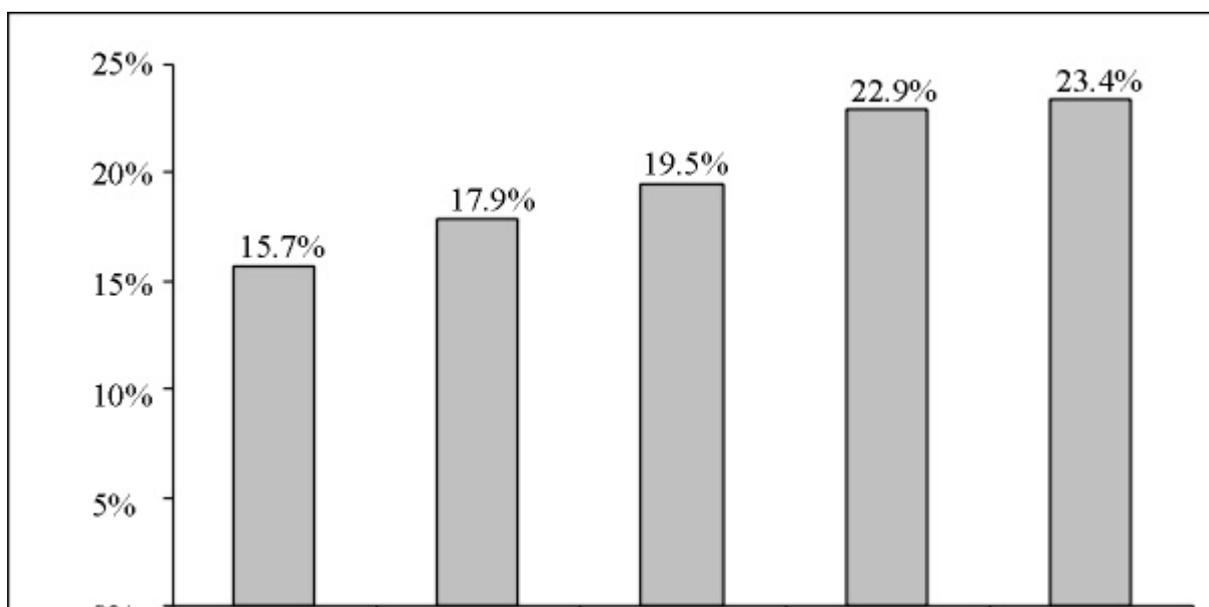
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## NOTES & EXHIBITS

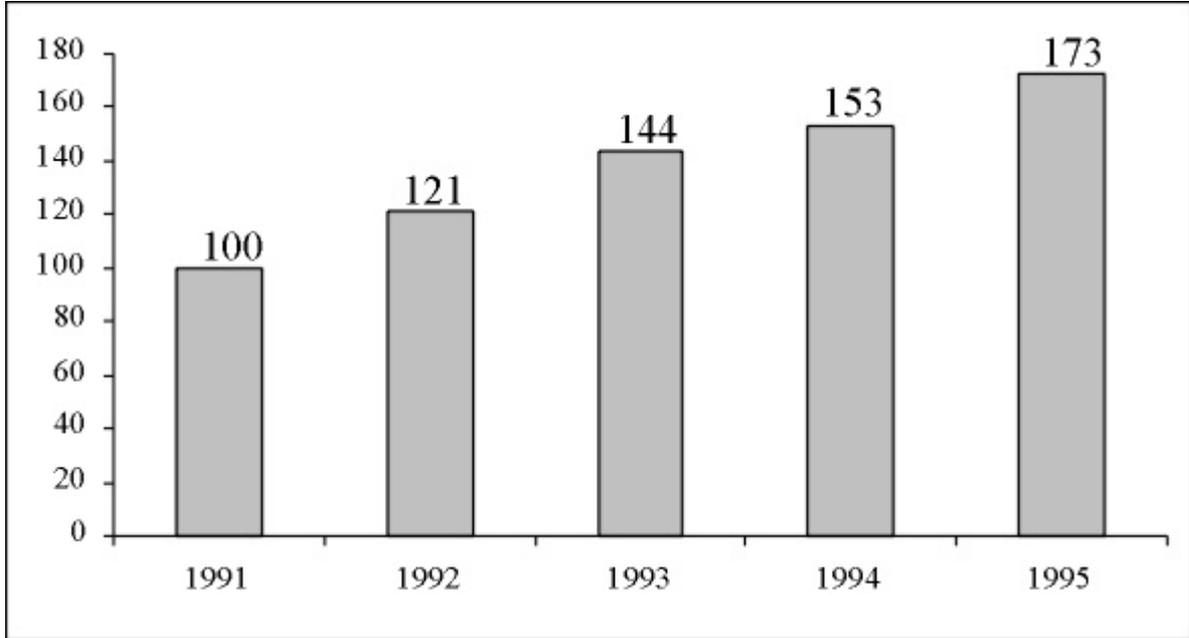
**FIGURE 1: DOVE DOLLAR SHARE OF BAR SEGMENT**



0%	1991	1992	1993	1994	1995
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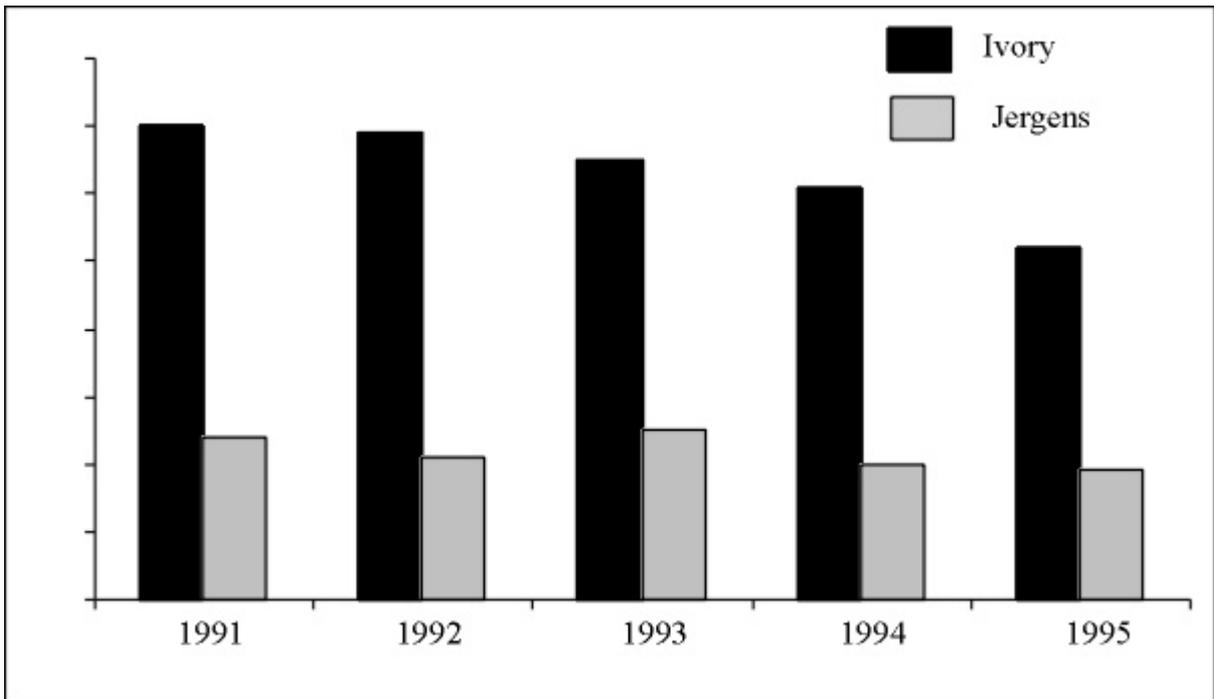
Source: ISL Personal Wash Care Report

**FIGURE 2: DOVE DOLLAR SALES INDEX**



Source: Lever Pond's

**FIGURE 3: IVORY AND JERGENS DOLLAR SHARE OF BARS**



Source: ISL Personal Wash Care Report