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The Unending Battle:
Disposables Fight For Market Share

Mary W. Bush
[REDACTED]
Honors Capstone
Journalism 496-H

"It's the rare baby nowadays who doesn't know about Pampers, Huggies, Luvs, or some other disposable diaper from first, well, first-cheek contact."¹ And it's the intentions of Cincinnati, Ohio based Procter & Gamble and Neenah, Wisconsin based Kimberly-Clark to make sure that it is their product which covers these babies' bottoms from "first-cheek contact."

The disposable diaper business in the United States posts annual sales of \$2.7 billion, and the worldwide sales of disposable diapers reaps in an annual \$4.7 billion. Consider 9 billion babies in diapers, changed 8 times a day, 56 times a week. That comes to 25 billion diaper changes a year. Then consider it costs about \$1 a day to outfit a baby in Pampers, \$1.25 a day to diaper a baby in Luvs, \$1.20 a day for Huggies, and approximately 85 cents a day for some private labels.² It is relatively easy to calculate the thriving business of disposable diapers from these estimates.

Last fiscal year, Procter & Gamble's two lines of diapers, Pampers and Luvs, contributed more than 20 percent to earnings of \$890 million (a decrease of 2 percent from fiscal year 1983), and 17 percent to sales of \$12.9 billion.

Its chief competitor, Kimberly-Clark, is a \$3.3 billion diversified consumer products company, with a net income of \$189 million.

These two companies are well entrenched in the disposable diaper market. P&G was the first to produce a disposable diaper that would be liked by mothers and their babies. The strength of such a large company as P&G has knocked out many competitors from the diaper category. K-C managed to make a strong inroad into the premium segment of the market. One year after nationwide distribution, Huggies managed to surpass Luvs and capture market share from P&G.

Procter & Gamble is losing profits with this market share loss, and it does not intend to stand idle. It is fighting back by improving its Pampers product which has been on the market for years and undergone many changes, and P&G is introducing a new product to this booming disposable diaper market. K-C is also working on ways to improve its Huggies so it can maintain its leading position over P&G's Luvs. Naturally, each company believes its product is the "best."

This paper will analyze the marketing efforts of these two giant companies in the disposable diaper market. It is my intention to provide the reader of this paper with a background of these two companies, their marketing strategies, their market share, their product differentiations, and their past advertising strategies and messages. I will provide this information to show the reader how the disposable diaper market has flourished since its beginning 24 years ago, and how changes in the actual diaper products made this market rise so quickly to a profitable success, especially for Procter & Gamble and Kimberly-Clark.

From there, I will explain the current battle which P&G and K-C are engaging in to defend and increase their market shares. In relation to this, the paper will discuss the new advertising campaigns which the companies are undertaking to promote their new disposable diaper products. This information will lay a basis for my discussion which concludes this paper.

So a major portion of this paper will be devoted towards the research I have uncovered about the two companies from periodical sources and pamphlets sent to me by the companies. (Refer to Appendix A) In the last portion of the paper, I will include my comments of analysis on the two companies and their operations in the disposable diaper market. I will focus on their current battle and discuss the implications of it.

With the scope of the paper determined, I invite the reader to proceed to Part I.

PART ONE

A Brief History

With the introduction of Pampers, Procter & Gamble demonstrated what their company does best: "develop a product that barely existed yesterday and market it so that few can live without it tomorrow."³ In 1961, P&G introduced Pampers, the first disposable diaper, to the American market which for ages had relied on the traditional cloth diaper to protect the bottoms of millions of babies.

Procter & Gamble's venture into the paper products market began in 1956 when the company acquired Charmin Paper Mills, a small and largely obsolete operation in Green Bay, Wisconsin. The story goes that a loving grandpa, coincidentally also a P&G engineer, decided there had to be a "better way" after changing the cloth diaper on his first grandchild. As it was, parents had always been complaining about the odious laundering, folding and storing of cloth diapers. Parents who used delivery services griped about shortages in clean bundles, and about the torn, thin and stained diapers delivered. P&G itself found through research that cloth diapers bunched up and failed to keep babies sufficiently dry.

With determination and profit as its motivating force, P&G set out to produce an alternative to the cloth diaper. But their first efforts failed, because parents complained the elasticized plastic pants were as hot as a "Turkish bath." So P&G tried again and this time developed a diaper that pleased both moms, and their babies. Interestingly, consumers named the product "Pampers," because it "best conveyed the feeling of tender loving care they wanted for their babies."⁴

Despite this breakthrough that would alleviate the hassles of cloth

diapers, P&G's product was still too expensive for most parents. So P&G answered the problem by introducing a cheaper diaper, thus giving birth to a new industry. This new diaper could be sold at a cheaper price, because of a "complicated machine that takes rayon and wadding and polyethylene and cuts and shred and glues and folds and twists them into finished Pampers at a marvelous rate."⁵ By 1969, Pampers were available across the country, and by 1976, almost half of the babies in America were diapered in Pampers. This new industry grew to be P&G's second-largest business after laundry detergents.

But P&G's efforts did not stop there. Soon "new" and "improved" versions of Pampers hit the market, including a style for premature infants and new absorbency weights. Eventually, tape fasteners replaced pins, and in 1982 P&G added "'stay-dry gathers for all-around wetness protection."⁶ In addition to upgrading Pampers, in 1976 P&G introduced Luvs, a "premium performance, premium-priced diaper with a contour shape and leg gathers."⁷

Throughout this development, P&G's work did not go unnoticed. Competitors quickly joined the race to produce a better disposable diaper. The Kimberly-Clark Corporation developed "Kimbies," and Johnson & Johnson first marketed its "Johnson Disposable Diapers." P&G's success also knocked some competitors out of the diaper race. In mid-1971, P&G demolished the market of "babyScotts," "Scott Tots," and "Raggedy Ann and Raggedy Andy" diaper lines operated by the Scott Paper Company. In November of 1970, the International Paper Company stopped selling its "Freshabyes," originally sold under the name "Flushabyes."

The strongest competitor for P&G has been the Kimberly-Clark Corporation, despite the fact it appeared in 1976 that K-C was finished in the diaper business. K-C's first product, "Kimbies," met with little

success in the early 1970s. Although it was the first diaper to use fluff pulp for better absorbency and to have a tape closure system instead of safety pins, some of these ideas were adopted and improved upon by competitors. Darwin E. Smith, K-C's Chairman of the Board and Chief Executive Officer, said "We made the mistake of falling behind in product development. As a result, Kimbies' sales dropped precipitously, and we were left with a tough, expensive decision to make about our future in the diaper business." (Quoted from K-C pamphlet)

Deciding to remain in the business, in early 1976, K-C developed a long-range diaper research and product improvement program. By late 1976, K-C introduced an improved Kimbies diaper. Shortly after, in mid-1977, a new and better diaper known as Kleenex Super Dry was test marketed. Then another version of Kleenex Super Dry was introduced with more refinements and more test markets. Although these products had gained some edge in the market, they were a long way from overtaking the leaders.

Then in January 1978, "Huggies" with elastic at the leg for better fit and performance was introduced in two states. Huggies marked K-C's entry into the emerging premium segment of the market.

The premium diapers market continued to grow because these newer products did a better job of keeping the baby dry and comfortable. As this segment grew, K-C committed itself to improving Huggies and expanding distribution to new areas of the country as fast as production capacity would permit. By the end of 1982, Kleenex Huggies finally were available throughout the country. It was the first time a K-C diaper had been in national distribution since 1974. By the end of 1983, Huggies became the country's leading premium diaper, over P&G's Luvs disposable diapers.

Marketing Strategies

In all, Procter & Gamble spent a full 10 years developing and test marketing Pampers. Engineers at P&G needed to produce something that was "simultaneously soft and strong as well as moistureproof, yet which could be profitably mass-produced at a popular price."⁸

According to Edward C. Harness, Chairman of the Board at P&G, "The key to successful marketing is superior product performance." (Quoted from P&G pamphlet) P&G's marketing philosophy is based on the fact that it would be very difficult to carve out a position in an established market or build business in a new one, if a product does not have a "point of superiority" which appeals to the public, and which will be evident when the product is used.

Harness says that observers of P&G's business frequently attribute their marketing successes to P&G's advertising and selling skills. He says, "They conclude that the success of a product like Pampers is the result of a high level of consumer demand which we have somehow pumped up through large-scale advertising and promotion campaigns. Harness' view is opposite to this: "Advertising and selling skills can get consumers to try the product but after, the health of the brand depends entirely on satisfaction with its performance."

This is the basis for P&G's marketing strategy, which lead the company to market a product that dominates today's disposable diaper category. P&G was the first to identify an emerging consumer need and to continually offer product improvements which satisfied the needs of consumers.

Kimberly-Clark's marketing philosophy operates along similar lines, according to Darwin E. Smith: "Providing value and quality to our customers is the best assurance of lasting success." (Quoted from K-C pamphlet)

Market Share

As mentioned in the introduction, disposable diapers equal annual U.S. sales of \$2.7 billion. Procter & Gamble and Kimberly-Clark are constantly battling for increased market share. The latest figures (from the First Boston Corporation) reveal that P&G still leads the over-all disposable diaper category with a 52 percent share -- Pampers has 32 percent and Luvs 20 percent. K-C's Huggies, the major competitive brand for Luvs, commands a solid 25 percent share of the market.

While P&G's share of the market seems impressive, in 1975, P&G's Pampers covered 75 percent of the market share. In 1982, P&G's two brands held 61 percent of the market and in 1983, this decreased to a 54 percent market share.

When Luvs and Huggies were introduced, parents willingly paid up to 30 percent more to get less mess, and the two brands forwarded at an average rate of 29 percent a year from 1979 to 1983. Huggies grew from a 14 percent share in 1982 to 24 percents in 1983. Private label and small brands accounted for 22 percent of the market in 1983, down from 24 percent a year earlier. Because Pampers was locked between low-priced diaper products, and Luvs and Huggies, it lost market share to both.

Recent trends indicate that premium diapers, as a category, show the strongest market share growth. However, according to Dick Auchter, K-C product manager-infant care products, "Share gains aren't going to be as spectacular as in the 1970s"⁹ due to the softening of the baby boomlet.

The decreased birth rate will at most only allow for a 4-5 percent yearly unit growth rate of the whole disposable diaper market by 1987, predicts Jack Salzman, analyst for Smith Barney. Other factors adversely affecting the unit growth rate of the overall disposable diaper market

include that the market has been saturated, and the prices of fluff pulp are increasing, thus sending profits down. The disposable diaper market only grew 7 percent in 1981 and 1982, as compared to 12 percent in 1980, 10 percent in 1979, and 12 percent in 1978.

Product Differentiation

All diapers are constructed in basically the same manner; a fluffed-fiber padding is sandwiched between two liners. The outer liner is a plastic-sheet barrier, much like waterproof pants over a cloth diaper. The inner liner is a non-woven material. On Huggies and Pampers, the liner is a spun-bonded polyolefin which is supposed to keep a baby drier because the liner does not absorb water. The adhesive-tape tabs are attached to the outer liner.

There are two styles of diapers -- elastic-leg style and prefolded style. The elastic-leg has a padding and liner, or sometimes just a padding, that is cut in an hourglass shape with a narrowed waist to cover a baby's crotch without excessive bunching. The elastic around the leg openings and sometimes along the sides insures (supposedly) a snug, leak-free fit.

The other style, prefolded, has its liner and padding in a rectangular shape like the cloth diaper, but its two long sides are folded approximately an inch along the entire length. The purpose is to allow the prefolded area to conform to the baby's crotch and to open the folds at the diaper's ends so they can reach comfortably around the waist.

The prefolded models come in newborn sizes, 12 pounds or less, ranging up to toddler sizes, over 24 pounds. Intermediate sizes seemingly are divided according to functions -- daytime, nighttime, daytime extra absorbent -- but actually are categorized according to the amount of padding which may be needed for varying children within the

13 to 24 pound range.

Sizing for the elastic-leg models is much simpler. Only three sizes are available: small, 12 pounds or less; medium, 13 to 26 pounds, and; large, over 26 pounds.

Huggies are available in four sizes, whereas Luvs only three sizes. The tape on Pampers can be refitted and refastened any number of times, contrary to the tapes on Luvs and Huggies which can only be refitted once on each side, but refastened any number of times in the same spot to save unnecessary diaper changes.

Another product improvement added to Pampers by P&G in 1984 was a new larger size, maximum-absorbency diaper for the toddler weighing between 23 to 35 pounds. A larger, convenient pack was designed for the regular and super absorbency sizes.

In 1984, P&G began test marketing in Buffalo, New York a Pampers with a breathable leg cuff that contained thousands of tiny pores around the leg to let air circulate inside the diaper where a baby needs it the most. Also, in Louisville, Kentucky, P&G began test marketing a dual-elastic on the diaper leg with a softer top sheet.

In addition, for conveniency purposes, P&G began packaging diapers in large plastic bags instead of boxes. A conventional package for small sizes of Luvs has also been added to this diaper line. According to Hercules Segalas, a vice president at William D. Witter, Inc., "a highly significant factor in marketing disposable diapers is their bulkiness -- a fact that makes stores loath to stock more than two or three brands."¹⁰ Perhaps this accounts for part of P&G's packaging redesigns.

Richard Powers, product manager for K-C's infant-care products, said K-C never test marketed tapes on their diapers because other factors indicated it would be welcomed by consumers.

Price Differences

Huggies

SIZE	POUNDS	COUNT	PRICE/BOX
Newborn	Up to 14	66	\$8.79
Medium	12-24	18	\$3.45
Large	23 and over	12	\$3.45
Large	23 and over	33	\$8.79

Luvs

Small		66	\$9.17
Medium	12-16	18	\$3.49
Medium	12-26	48	\$9.17
Large	24 and over	12	\$3.49
Large	24 and over	32	\$9.17

Pampers

Small		24	\$2.58
Medium	12-24	18	\$3.29
Medium	12-24	54	\$9.09
Small	6-13	90	\$9.09
Large	19-35	12	\$2.99
Large	19-35	48	\$9.09

**These prices quoted from Eagles Food Store in Sycamore.

Past Advertising Expenditures and Selling Messages

Advertising expenditures for disposable diapers are a big business. According to 1983 estimates, more than \$60 million annually goes towards the advertising of disposable diapers. The market for disposable diapers is different because the target audience changes every 2 to 2½ years.

"There's very little brand loyalty from one pregnancy to another. We just can't count on the reputation we made five years before," says Fred Lamparter, management supervisor of Huggies at the Ogilvy & Mather ad agency. "Even during the time the one child is in diapers, there's relatively low brand loyalty, with mothers constantly trying new products."¹¹

Procter & Gamble alone averages an estimated \$40 million ad budget for Luvs and Pampers, the greater portion, approximately \$22 million, going to Pampers. K-C budgets \$19 million for Huggies.

Advertising for disposable diapers usually takes the form of television commercials with babies, because these messages are the most widely recalled and admired. In the past, P&G has claimed in its ads that Pampers keep your baby drier than cloth. The commercials have taken a traditional slice-of-life format involving a lady (or ladies) talking to the camera (or each other) performing a blotter demonstration.

After P&G added leg gathers to Pampers, they added an animated stork to its real-life commercials which aimed at going after bargain diaper brands without gathers that could "gap and leak." The spots concluded that Pampers, unlike bargain brands, offered "wetness protection right down to (his or her) toes. Now that's a real bargain."¹²

The ads for Luvs, a premium disposable diaper, show both parents "lavishing the best on their prince or princess."¹³ The father in the television ad claims that "keeping him comfortable is far more important than anything we could do for ourselves."¹⁴ All ads end with the slogan

"Your baby's comfort begins with Luvs . . . Luvs."

Benton & Bowles handles the Pampers account, and Dancer Fitzgerald Sample holds the Luvs account for P&G.

Ogilvy & Mather deals with Huggies for K-C. Their approach to advertising follows a different course. Ogilvy & Mather's Fred Lamparter explains, "To not have parents in a diaper ad is almost heresy."¹⁵ Huggies commits it. Television and print campaigns for Huggies feature infants in adult occupations. The copy focuses on "stopping leakage and providing absorbency."

The Unending Battle

The battle for a solid position in the market of disposable diapers is neverending, as exemplified by the two main competitors. Procter & Gamble and Kimberly-Clark continually seek ways to improve their market share by producing a more comfortable, more absorbent disposable. P&G's latest entry into this race is "new superabsorbent Pampers," which is aimed at challenging K-C's Huggies.

Research shows the trend nowadays is clearly towards premium disposable diapers, such as Huggies and Luvs, and away from lower-priced brands such as Pampers. The new superabsorbent Pampers have been in Wichita, Kansas test markets since early November 1984. They resemble Luvs with elasticized legs, refastenable tapes and an hourglass shape. The main difference is that the new Pampers are less bulky.

The price for the new Pampers is about the same as Luvs, \$9 a box. A buyer in Wichita says "The diapers have a thin, stay-dry liner; similar to the materials widely used in feminine protection products. When the baby wets, the liner channels the fluid into the diaper so it doesn't leak out the sides. That way, the layer next to the baby is always dry."¹⁶ P&G may introduce this new product nationally by the end

of 1985.

P&G is simultaneously testing a new package design and courtsizes for superabsorbent Pampers in Wichita. In addition to the Wichita diaper, P&G has redesigned and upgraded Pampers into another premium-price product being tested in Northern Florida and South Georgia. P&G claims the following features make it the best in the market so far: a shaped fit, refastenable tapes, high absorbency, double-elastic gathers, waist shield and breathable leg cuffs. The waist shield is designed to prevent leakage at the waist that occurs when a baby is lying down.

The shift towards premium diaper brands has caused problems for both P&G and K-C, as they struggle to retool factories and produce enough premium diapers to meet the demand. Presently, both companies are back up to full production capacity.

While P&G is improving its Pampers, K-C is also improving its Huggies to prepare for this battle of the market. K-C is testing in Northern Florida, Huggies extra-absorbent Medium 40s. These new Huggies have a cotton-crotch insert panel as well as an elasticized gather waistband.

New Advertising Campaigns

Promoting these new products will cost P&G a small fortune to say the least. Over the next two years, it is estimated that P&G will spend approximately \$100 million to advertise its redesigned Pampers alone. To prevent improved Pampers from plundering Luv's market share, ads for improved Pampers will stress that it is the ultimate in dryness; ads for Luv's will promote it as the best diaper for baby's comfort. "There's enough of a difference of opinion of mothers about what counts in a diaper to encourage us to think that both can succeed," said Richard Nicolosi, manager-U.S. paper division, P&G.¹⁷

Ogilvy & Mather's ads for new Huggies extra absorbent Medium 40s will position them as the "overnight diaper."

The new newspaper and television advertising for new superabsorbent Pampers are themed "Pampers is better than any other diaper at helping keep baby's skin and clothing dry." The campaign, by Benton & Bowles, New York, will feature a mother and child talking about diapers, showing Pampers' new "channeling action." Copy for the ads reads "New Pampers ultradry core actually helps lock in wetness and stop it from squeezing back out and wetting your baby."¹⁸

PART TWO

An Analysis

Competition between Procter & Gamble and Kimberly-Clark is, without a doubt, very intense. Each competitor is out to produce the most comfortable, most absorbent disposable diaper. So it is no wonder that P&G, seeing its market share dwindle over the last couple years, is spending a half billion dollars to retool its plants to make new superabsorbent Pampers.

In attempting to regain market share, P&G is creating some questionable moves. First, why is P&G upgrading its Pampers into the same segment as its own premium-price Luvs? The company's advertising is stressing different benefits for each diaper -- dryness for Pampers, comfort for Luvs. And the company firmly believes mothers expect different benefits from different diapers. But is there really a noticeable difference between brands, and if so, just how much is noticeable?

It seems to me (someone who has only changed diapers on my niece) that most diapers appear very similar -- thick absorbent padding, elastic-leg cuffs, refastenable tapes, and hour-glass shape. My niece has been diapered in Pampers, Huggies, and Luvs. I cannot say that I noticed her preference for any particular one of these brands, but as she grew older, she knew how to say the diaper brand by name that her mom was changing her in. Her mom preferred the diaper that kept her the driest when she wet. But more than anything, her parents preferred the diaper that could be bought for the best price. This does not mean that they are not loving parents because they buy diapers according to price; quite the opposite. A box of disposable diapers is very expensive and babies

run through a box so fast because they have to be changed often. Therefore, price is relevant in the high level of brand switching in this category.

Although as I said I've only had limited experience with diapers, from viewing disposable diaper commercials on television, I still cannot see a sizeable difference between the functions of each. But disposable diapers will be around until some better method of controlling a baby's wetness is devised, and that does not seem to be in the near future.

P&G is taking a risk at positioning improved Pampers against their own Luvs brand. Will mothers notice a difference between each brand? P&G makes different brands with different performance characteristics. The company feels that since each brand is operated as a separate business, each is expected to stand on its own feet and compete against other P&G brands as well as those made by other competitors.

In this situation, positioning two brands in the same premium-price segment is a risk for two reasons. First, improved Pampers can only serve to take away from Luvs market share, instead of contributing to P&G's total market share. Secondly, if improved Pampers does not perform for consumers as promised, it could harm the sales of Luvs as well, because consumers will assume Luvs is just as "bad" as improved Pampers knowing it is also manufactured by Procter & Gamble.

While P&G is improving and introducing products, it is important to consider what Kimberly-Clark's reaction will be to the situation. K-C claims: "We believe Huggies is the best on the market today, and we intend to keep them that way."¹⁹ Similarly, P&G boasts that Pampers is "the leading brand." So who's the best in this race? Personally, I cannot say whose brand is better. And I wonder how much more diapers

can be improved to be the "best."

In regard to advertising, each competitor has taken a different approach. K-C's strategy of using babies in adult situations has proven successful. P&G has kept the traditional approach using loving parents with their babies. Personally, I recall commercials for Huggies better, because of the "cute" approach. However, I really don't look for product benefits when I view disposable diaper commercials. But when I think of advertising slogans for diapers, I recall the slogan for Luvs most easily because it is sung in the commercials I see on television.

P&G spends a large sum of money on advertising their products. Their new campaign will cost them a bundle to promote. The ad theme will have to prove the new superabsorbent diaper is the best. Perhaps P&G can rely on its reputation as a consumer-oriented company that provides only high performance, satisfying products to its customers. A spokesman for K-C believes that P&G feels uneasy about using a superabsorbent material because of its experience with the Rely tampon, which had to be removed from the market because of its possible link with toxic shock syndrome. Does this present a situation that K-C could capitalize on? Will consumers be hesitant to try this new product because of this fact?

An analyst said P&G will boost the price of Pampers at least 10 to 20 percent. It is questionable if whether or not an increase in price will lead to an increase in P&G's market share.

The battle for market share is unending. Jack Salzman for P&G says "If this new Pampers is successful, P&G will probably introduce a new, lower price disposable to better compete with private and generic brands."²⁰ How will P&G differentiate this diaper? And once again, how will it affect competitors' positions as well as P&G's position in the market?

To conclude, Dick Auchter for K-C says, "The number of babies born hasn't changed all that much from a few years ago, but the percentage of diaper changes per baby has increased."²¹ So the competition will continue to heat up and the race will continue with speed. Laurie Freeman ("Disposables try to stop leakage") concludes on this market share race: "Until they can figure out a fool-proof way to make babies soil them faster, diaper marketers are going to continue upgrading babies' underwear and charging parents more per change at the same time."²²

Notes

- ¹Bernice Kanner, "The Bottom Line," New York, Oct. 1983, p. 22.
 - ²Kanner, p. 22.
 - ³Waye Rice, "Trouble at Procter & Gamble," Fortune, Mar. 1984, p. 70.
 - ⁴Kanner, p. 22.
 - ⁵John H. Allan, "Pampers and Profits at P&G," Chicago Tribune, 25 Feb. 1972, Sec. 2, p. 3, col. 2.
 - ⁶Kanner, p. 22.
 - ⁷Kanner, p. 22.
 - ⁸"The Great Diaper Rash," Forbes, 106, No. 12 (1970), p. 25.
 - ⁹Laurie Freeman, "Disposables try to stop leakage," Advertising Age, Feb. 14, 1985, p. 27.
 - ¹⁰Allan, p. 3, col. 1.
 - ¹¹Kanner, p. 22.
 - ¹²Kanner, p. 24.
 - ¹³Kanner, p. 24.
 - ¹⁴Kanner, p. 24.
 - ¹⁵Kanner, p. 24.
 - ¹⁶Laurie Freeman, "P&G pins strategy on super Pampers," Advertising Age, Dec. 12, 1984, p. 34.
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¹⁷Nancy Giges, "P&G pampers diaper brands," Advertising Age, Jan. 21, 1985, p. 76.

¹⁸Nancy Giges, "Questions unfold on P&G's Pampers move," Advertising Age, Jan. 28, 1985, p. 28.

¹⁹Giges, "Questions unfold on "G's Pampers move," p. 28.

²⁰Freeman, "P&G pins strategy on super Pampers," p. 34.

²¹Freeman, "Disposables try to stop leakage," p. 27.

²²Freeman, "Disposables try to stop leakage," p. 27.

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"Last Minute News." Advertising Age, 56, No. 15 (Feb. 25, 1985) p. 8.

"Last Minute News." Advertising Age, 56, No. 19 (Mar. 11, 1985) p. 8.

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"The Great Diaper Rash." Forbes, 106, No. 12 (Dec. 1970), pp. 24-30.

APPENDIX A

DeKalb, IL 60115
February 14, 1985

Procter & Gamble
Director of Public Relations
301 E. Sixth Street
Cincinnati, OH 45201

Attention Director of Public Relations:

I am a senior at Northern Illinois University in DeKalb studying advertising. I am enrolled in the University Honors Program, and as a graduating senior, I am required to research in depth a topic relating to my field of study.

In the December 12, 1984 issue of Advertising Age, I read an article entitled "P&G pins strategy on super Pampers." The article stated that Procter & Gamble has developed superabsorbent Pampers to counterpunch Kimberly-Clark's market-share advancement in the disposable diaper category. The article interested me and I would like to learn more about the marketing and advertising strategy P&G will employ to introduce superabsorbent Pampers.

I need some information concerning this new product and campaign to be sent to me for my study. I am specifically interested in any material concerning product benefits, and advertising, marketing, or media objectives. I also would like any available material about previous campaigns for Pampers.

I would appreciate if this request could be given some immediate attention since my research time is limited. Thank you for your time and cooperation.

Sincerely,

Mary E. Bush

Mary E. Bush

[REDACTED]
DeKalb, IL 60115
February 14, 1985

Kimberly-Clark Corporation
Director of Public Relations
North Lake Street
Neenah, WI 54956

Attention Director of Public Relations:

I am a senior at Northern Illinois University in DeKalb majoring in Advertising. I am enrolled in the University Honors Program, and as a graduating senior, I am required to research in depth a topic relating to my field of study.

For my assignment, I am conducting some research in the disposable diaper product category. I read that Kimberly-Clark's Huggies has been gaining market share from Procter & Gamble's Pampers and Luvs disposable diapers. To counterpunch this, P&G is introducing superabsorbent Pampers. I am interested in learning more about the sales of Huggies and how these sales will be affected by P&G's improved diaper product.

I need some information concerning this product to be sent to me. Any information about product benefits, advertising, marketing, or media objectives, and promotional material would aid me in my study.

I would appreciate if this request could be given some immediate attention since my research time is limited. Thank you for your time and cooperation.

Sincerely,

Mary E. Bush

Mary E. Bush

DeKalb, IL 60115
February 27, 1985

Benton & Bowles, Inc.
Director of Public Relations
909 Third Avenue
New York, NY 10022

Attention Director of Public Relations:

I am a senior at Northern Illinois University in DeKalb studying Advertising. I am enrolled in the University Honors Program, and as a graduating senior, I am required to research in depth a topic relating to my field of study.

In the December 12, 1984 issue of Advertising Age, I read an article entitled "P&G pins strategy on super Pampers." The article stated that Procter & Gamble has developed superabsorbent Pampers to counterpunch Kimberly-Clark's market-share advancement in the disposable diaper category. The article interested me and I would like to learn more about the marketing and advertising strategy Benton & Bowles will employ to introduce superabsorbent Pampers for Procter & Gamble.

I need some information from Benton & Bowles concerning this new product and campaign to be sent to me for my study. I am specifically interested in any material that discusses product benefits, and advertising, marketing, or media objectives. I also would like any promotional material about previous campaigns for Pampers.

I would appreciate if this request could be given some immediate attention since my research time is limited. Thank you for your time and cooperation.

Sincerely,

Mary E. Bush

Mary E. Bush

[REDACTED]
DeKalb, IL 60115
February 27, 1985

Ogilvy & Mather, Inc.
Director of Public Relations
2 East 48th
New York, NY 10017

Attention Director of Public Relations:

I am a senior at Northern Illinois University in DeKalb majoring in Advertising. I am enrolled in the University Honors Program, and as a graduating senior, I am required to research in depth a topic relating to my field of study.

For my assignment, I am conducting some research in the disposable diaper product category. I read that Kimberly-Clark's Huggies has been gaining market share from Procter & Gamble's Pampers and Luvs disposable diapers. To counterpunch this, P&G is introducing superabsorbent Pampers. I am interested in learning more about the sales of Huggies and how these sales will be affected by P&G's improved diaper product.

I need some information from Ogilvy & Mather concerning their Huggies' account to be sent to me. Any information relating to advertising and media objectives and strategies from campaigns for Huggies would aid me in my study. I also would like any available promotional material from campaigns for Huggies.

I would appreciate if this request could be given some immediate attention since my research time is limited. Thank you for your time and cooperation.

Sincerely,

Mary E. Bush
Mary E. Bush

Kimberly-Clark

February 19, 1985

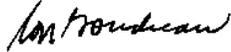
Ms. Mary E. Bush

DeKalb, IL 60115

Dear Ms. Bush:

Thank you for your inquiry about Huggies disposable
diapers. Although we are not able to provide the specific
information you requested, material in the enclosed
booklet, particularly pages 5-7, should be helpful in
your project.

Sincerely,



Ron Goudreau
Director, Public Relations Services

RG/mb

Enclosure



THE PROCTER & GAMBLE COMPANY

April 12, 1985

Ms. Mary E. Bush

DeKalb IL 60115

Dear Ms. Bush:

Recently your letter to Benton & Bowles, Inc. was forwarded to my attention because your inquiry concerned our product, Pampers.

Although we appreciate your interest, we're unable to provide the type of detailed information you requested about the introduction of new Pampers. I hope you'll understand that details of our introduction would be of considerable interest to our competitors as well, and that we're simply unable to share such information with anyone outside of our Company.

I'm enclosing materials of a general nature. I hope these will be of some help in preparing your paper.

Sincerely,

Wayne A. Perin
Consultant, Consumer Services

WAP:jt

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