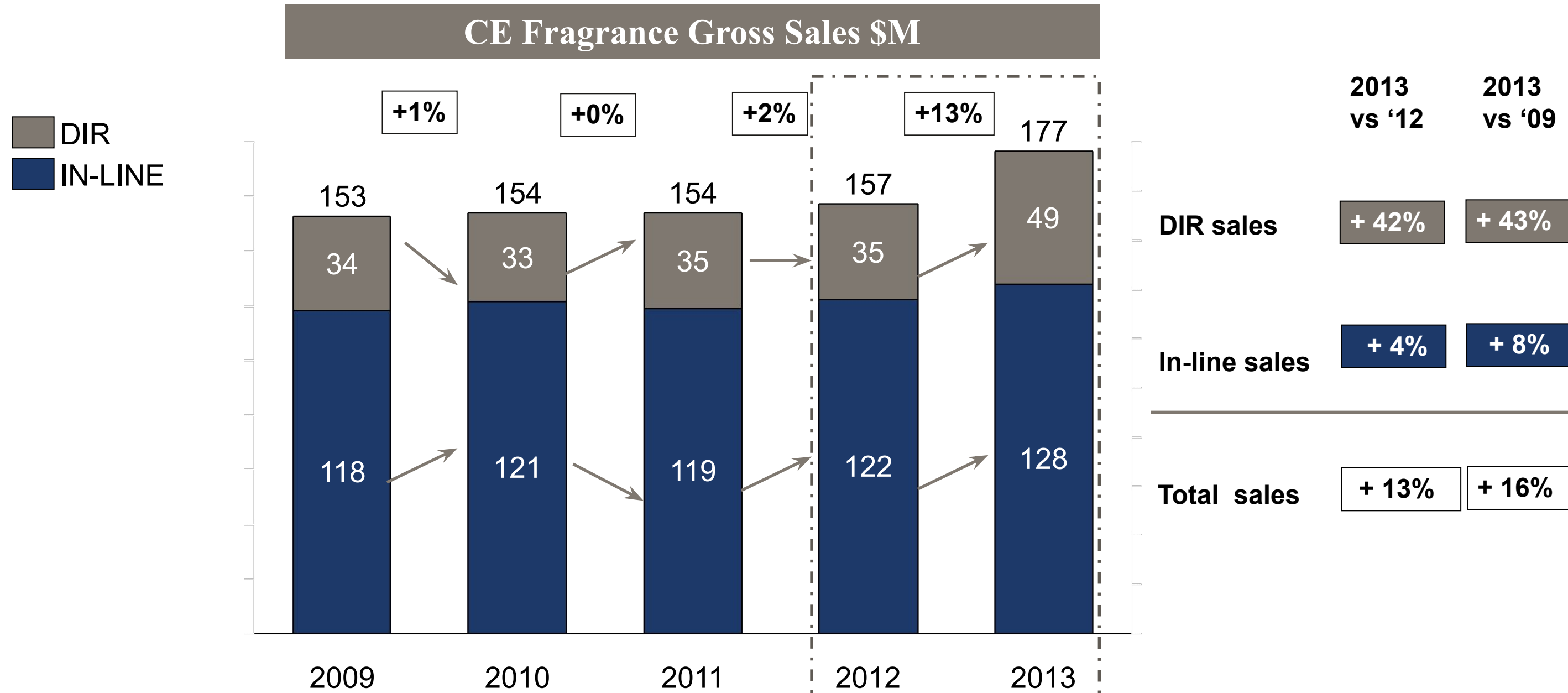
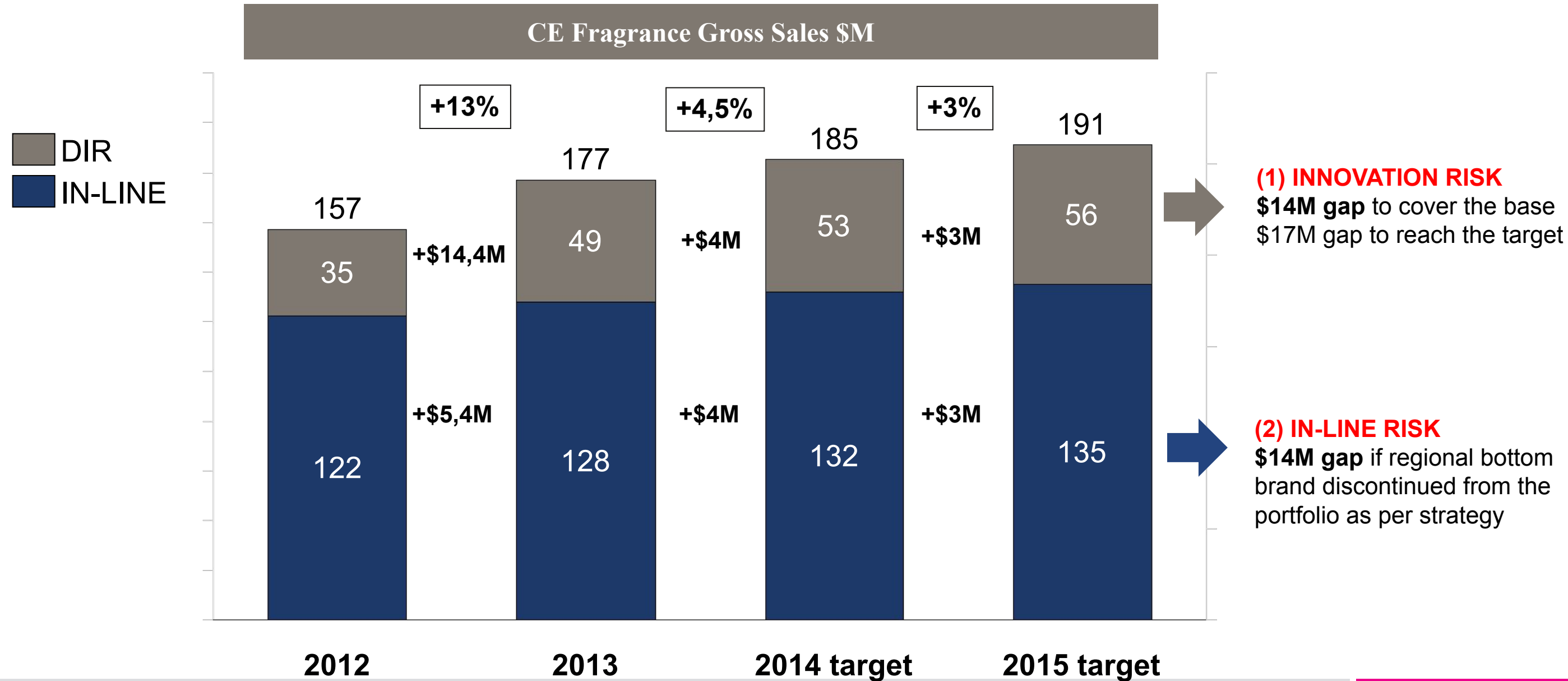


# CSL input to the strategy

# Fragrance category success in long term perspective can be only achieved through balanced In line and Newness growth



# CE aspiration is to achieve the level of \$191M sales from Fragrance category in 2015 - \$56M should be generated from DIR (+\$3M)



In 2015 we need to continue the strategy from 2014 and find new sources of energising the fragrance store

- **Worhorses**

# Workhorses

## What worked

- All franchises except for Perceive and Pur Blanca have increased their sales vs 2012.
- Xmas sets with new line extensions: body creams and shower gels worked above expectations.
- Selling of female workhorses at special price as opposed to sets works better .
- In 2013 we had cobos on Premium segment – it seems that it proves a role of a cobo – that if you offer a real deal – value for money – it works so much better – hence the success of TTA cobos
- Decanters are very productive.
- Great performance of male EDT offered as gifts to female fragrances(Incandessence in RO)
- LBD brand event works well for both newness and inlines
- Bridge offers bring incremental money
- Need to grow new and inlines simultaneously otherwise brands drop.
- Promotionals at value pricepoint 19,99 at back cover

## What didn't work

- Pur Blanca is in decline since 2010 which was its best year
- Overpriced sets on workhorses vs the hit price of 39,99 which we had started using in 2013.

# Workhorses

## Key implications & opportunities for growth

### Female

- Need new flankers to main brands as well as Line extensions and decanters to boost workhorses sales
- Work mostly through hit price, special price not sets with brand events
- Rare cobo /event as an opportunity in RO
- Brand ambassadors and celebrities to support LBD
- Commission program on workhorses

### Male

- Work through sets on male workhorses
- increase frequency of offers – on offer lost in every campaign

# Merchandising / pricepoints

## What worked

- PL: 1at2at offers work on a similar level since 2009 – the pricing has not been altered much – it is between 76 and 79,98 for 2 and the spreads make between \$0,5 and \$0,7.
- RO – Hooks are much more successful in RO on deos and roll ons, edts

## What didn't work

- RO1 at 2 at although still very productive needs revised pricing strategy
- PL: Hooks rarely in top spreads

# Merchandising / pricepoints

## Key implications & opportunities for growth

### Mass

- RO Need to reintroduce any 2 for 69,98 lei to double the sales from sell off spreads – for Xmas it is a must – (incremental \$0,8MM from spread in RO)
- Offer any 2 for for male store in c 2 - Valentine's.
- Opportunity -Offer male workhorse cobo Full Speed or BST – we haven't had one so far for c16 or 17 – a set priced 49,99 containing EDT,BW and a roll on – it would bring \$ 0,35 for PL and \$0,30k for RO (twice as much as a normal set) plus a cobo on female workhorse e.g. LBD
- Offer a male cobo for Fathers day in c 8 – in PL.
- Merchandising adjustment to fit new price corridors
- Offer a lower mass cobo for 8th March in RO –
- RO: It makes sense to reallocate money from the up to 19,99 pricepoint (least productive in inlines) into the above 59 pricepoint in RO. We will have incremental \$49k from each spreads what adds up to incremental \$0,4MM in 2015 in RO.

### Premium

-



# Pricepoints

## Key implications & opportunities for growth PL

### Mass

PL:Ensure up to 29,99 pricepoint in every single campaign with offers on workhorses if possible. New lower mass brand for males up to 19,99. And occasional lowering of lower mass to value to cover 19,99 for him.

PL:Continue building offers in the up to 19,99 pricepoint especially in female segment, replacing sales of Summer White Sunset as a must plus replacing 30ml promotionals and building on DNS

PL:Male segment – up to 29,99 pricepoint to be covered in every campaign and need to rebuild up to 19,99 with extra decanters and male mini sets.

### Premium

▪

# Pricepoints

## Key implications & opportunities for growth RO

### Mass

- Secure the above 59 ppt with offers on TTA: brand events, cobo offers and sets. Reallocate space from lower ppts: up to 19,99 – 2 spreads a quater.
- Secure ppt with offers on promotionals, value segment proposal and LE sets and seasonal value EDTS.
- Secure Body Sprays offer with 2 per Q hooks and hit pricing offers on line extensions – especially body sprays.
- Investment in any 2 for up to price in c 17 up to 69,98.

### Premium

▪

# Male

## What worked

- All franchises except for Individual Blue have increased their sales vs 2012;
- Great performance of male workhorses sold mostly through sets ( LE or washbags for free);
- Selling of male workhorses in sets works better than single edt or edp at a special price .
- Strong branding is needed in each male spread ( if possible)
- Decanters are very productive as it is in female segment
- Addressing gifting season in C16 and C17 (male fragrance as desirable gift)
- Second most productive offer for Workhorses is simple cross-out
- Micro is crucial – used on each top spread

## What didn't work

- Individual Blue performance – dropping since 2012

# Male

## Key implications & opportunities for growth

### Mass

- Strengthen Individual Blue using fragrance best practise – e.g. create special brand event with some crazy offers
- Develop value segment with low price points to cover the market offers
- Address low price point in every campaign (especially in RO)
- Ensure micro on workhorses

### Premium

-

# Deo

## What worked

- Cross out offers both male and female whole lines together
- Offers 1 at 2 at mainly Roll-ons
- Sets EDT+BS+ROD

## What didn't work

- Offers with EDT

# Deo

## Key implications & opportunities for growth

**Female**

More 1at 2at offers for body sprays or roll ons  
Increase if possible number of SKU in Roll-ons segment to drive the incrementality

**Male**

- More 1at 2at offers for body sprays or roll ons
- from time to time offer the sets with

# Occassions

What worked

What didn't work

# Occasions

## Key implications & opportunities for growth

### Sell off

- 

### Season related

- build layering experience
- summer => more intense flow of 14,99/19,99/24,99

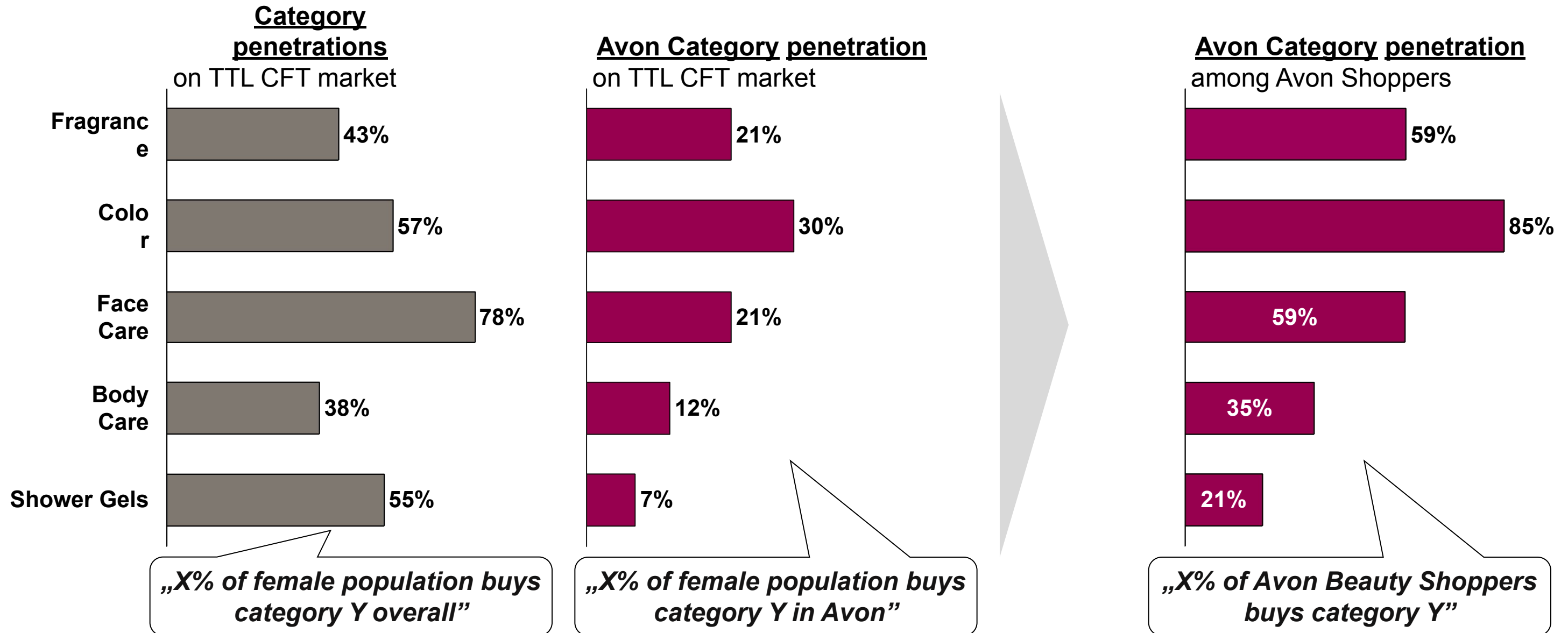
### Other

- every campaign tag: recommended as a gift!



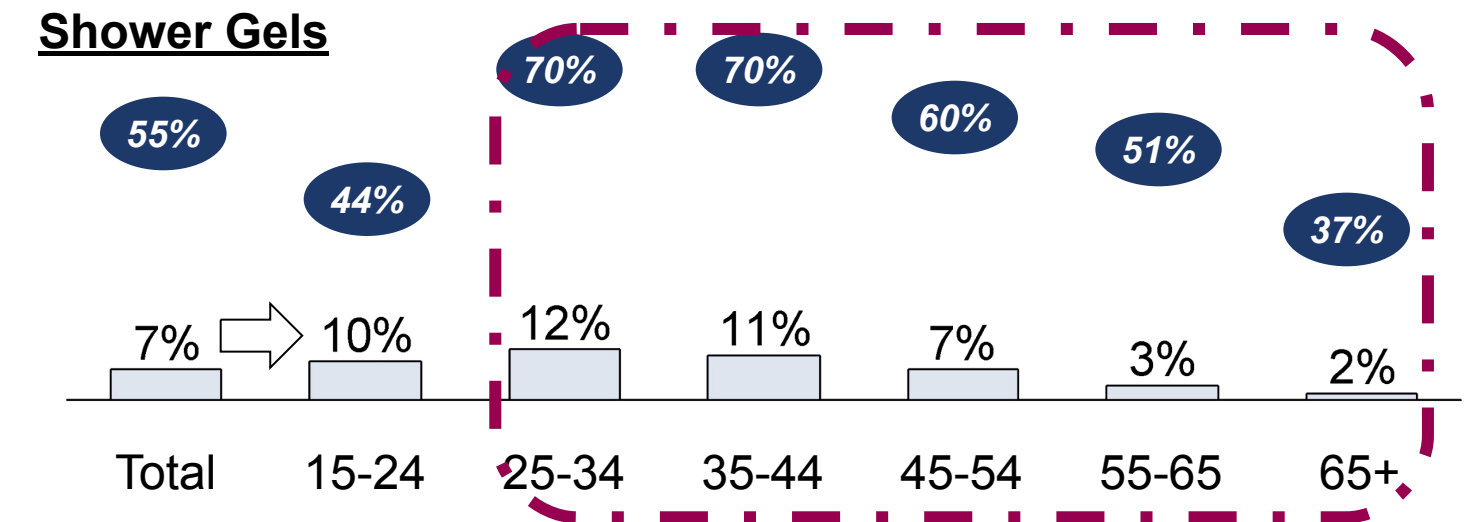
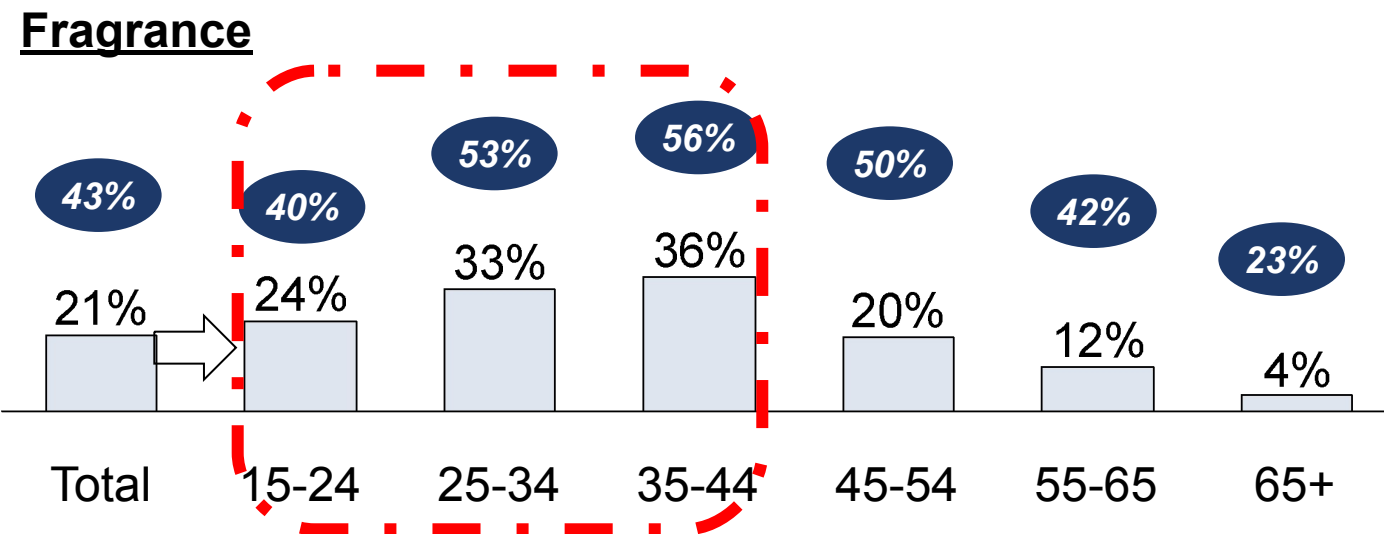
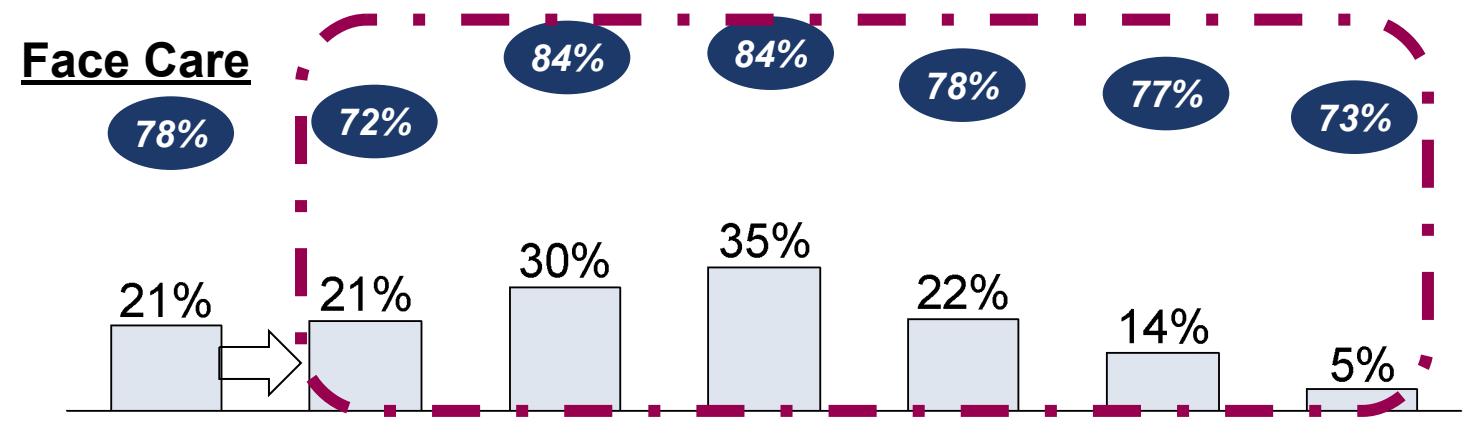
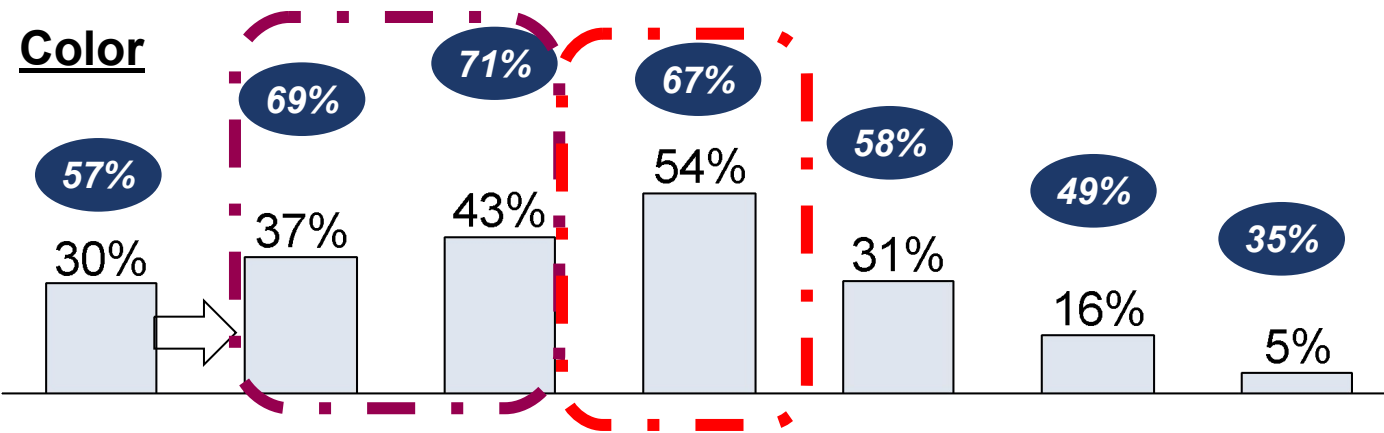
# We can also see huge penetration opportunity in SC & SG – vs market and vs Avon Shoppers group

Category buyers penetration on the market and within Avon



# Some age segments reach its penetration limits e.g. In Fragrance (25-44); in Care, issue is valid for all ages

Avon shopper penetration, demo (Categories, % of female populat.)



# For categories, Frag/Color need to seek new source of growth, while 'Care' needs to recruit Shoppers

Key takeaways for Avon's categories

## Opportunities

## Risks

**Fragrance**

- Expand beyond core EDT/EDP portfolio to maximize high penetration leverage
- Define way to capture Premium for 15-24yo's

- Avon penetration reaching market limits □ need to start recruit new category Customers currently not using fragrances (e.g. Among Avon shoppers)

**Color**

- Increase share of wallet in 15-24 (by providing step-change in Value) & 35-44 (most likely by expanding range of segments bought)

- Color value segments' contribution gaining importance

**Face Care**

- Build Avon penetration in highest-penetrated market category in Poland
- Become entry category for 65+ segment

- Shrinking high-share-of-wallet segments (15-34)
- Growth of 65+ segment which will stand for SC market power by 2020

**Body Care**

- Expand portfolio with ultimate priority for Mass
- Cross-sell BC product segments in 25-44 segments to improve share-of-wallet

- Shrinking high-share-of-wallet segment (15-24)

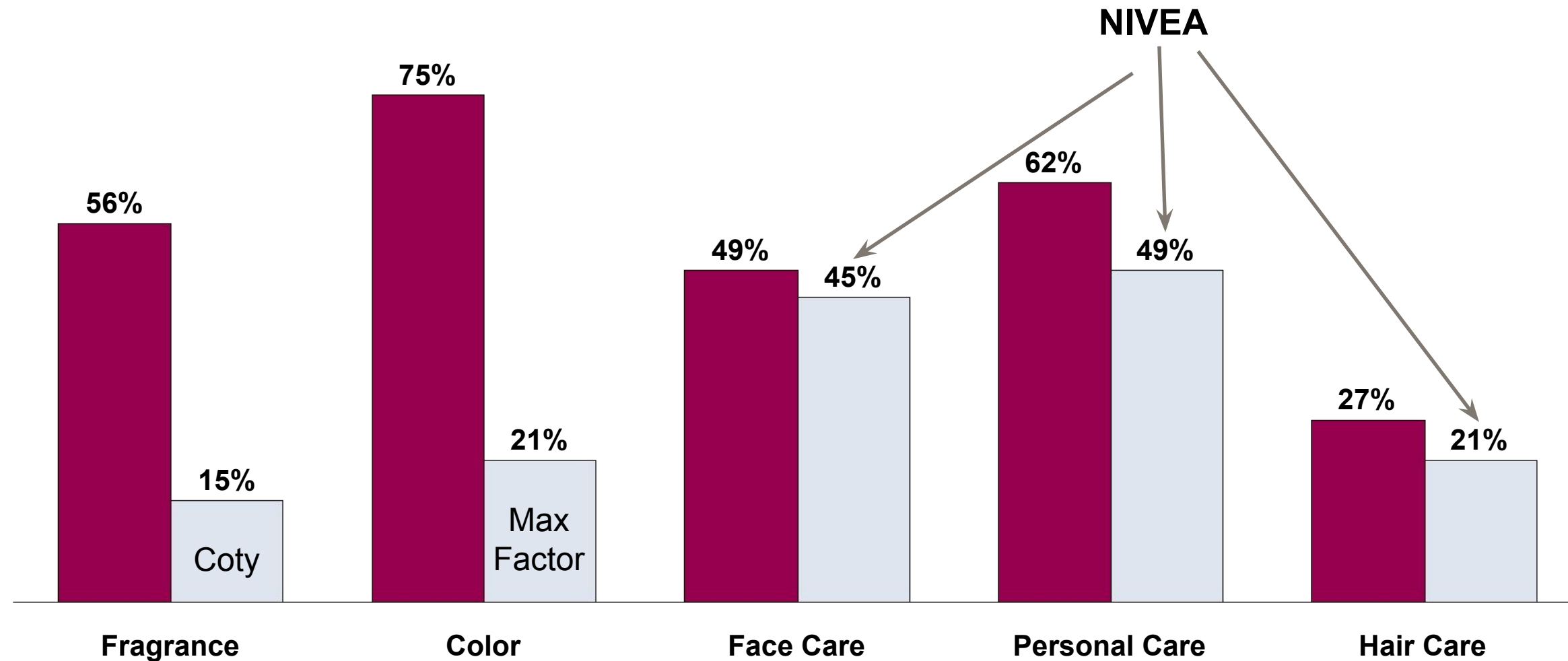
**Shower Gels**

- Extend market penetration to new benefit segments (Warm & Caring equity)
- Define Value SGs strategy (35-40% of market)

- Senses benefits narrowing subcategory market appeal on PL market

# Lastly, we clearly see from which brands each Category can take over share of wallet

Avon Categories & next important category brand used by Avon users



■ % of Avon Shoppers buying certain category

□ % of Avon Shoppers buying next important brand

# KEY SUCCESS FACTORS

IN-LINE - WINNING MIX



Focus on workshores



Pricing & merchandising strategy



Brochure exposure



Balance of net and unit generators



Communication & creative execution

# KEY SUCCESS FACTORS

IN-LINE - WINNING MIX



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Communication & creative execution

# Significant focus has been put on CE Workhorse brands - key

## Fragrance sales contributors

**Top 5 Brands = 46% Woman's sales**

**Top 3 Brands = 42% Men's sales**



**LBD**  
\$17,3M



**TTA**  
\$12,7M



**Incandessence**  
\$11,9M



**Perceive**  
\$9,6M



**Pur Blanca**  
\$8,9M



**Full Speed**  
\$7,4M

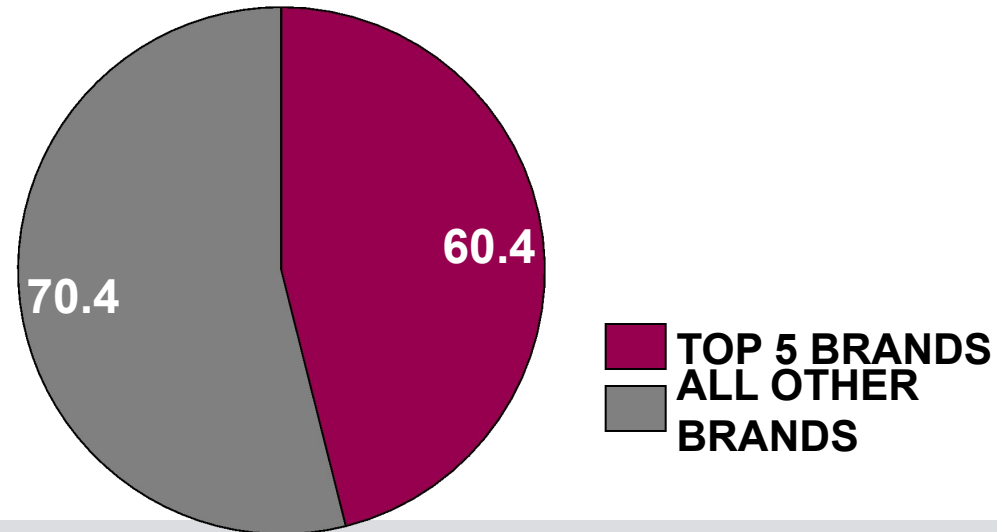


**Black Suede**  
\$6,5M

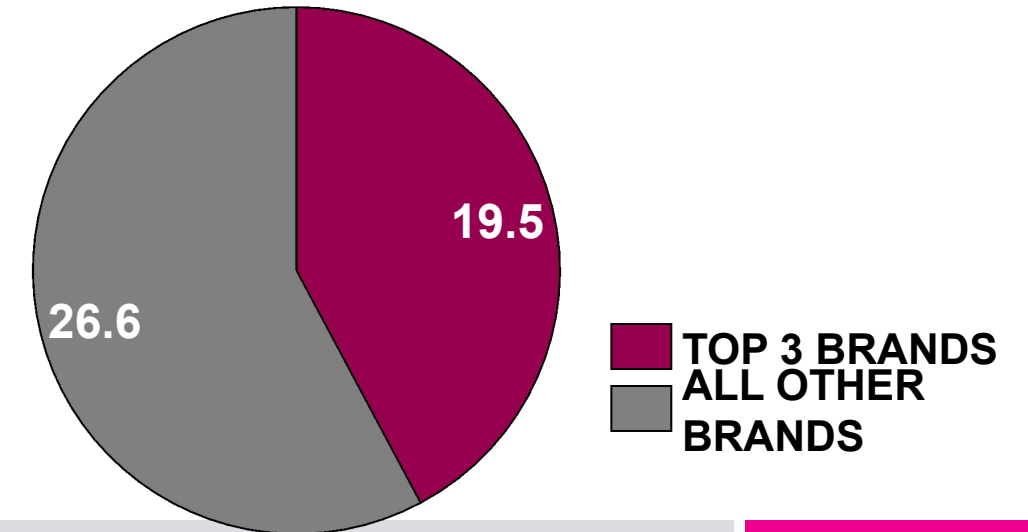


**Individual Blue**  
\$5,5M

**2013 CE sales \$M - Female segment**



**2013 CE sales \$M - Male segment**



# Top 5 brands – female workhorses CE – LBD as #1

## CENTRAL EUROPE

Brand	2012	2013
-------	------	------

#1



LITTLE BLACK DRESS FRANCHISE

4 865 750

5 948 036

#2



TODAY TOMORROW ALWAYS FRANCHISE

4 074 947

4 710 723

#3



INCANDESCENCE FRANCHISE

4 202 494

4 088 314

#4



PERCEIVE FRANCHISE

2 136 894

3 547 754

#5



PUR BLANCA FRANCHISE

3 369 412

3 275 529



# Top 5 brands – female workhorses PL – LBD as #1

## POLAND

Brand

2012

2013

#1



LITTLE BLACK DRESS FRANCHISE

4 865 750

5 948 036

#2



INCANDESSENCE FRANCHISE

4 074 947

4 710 723

#3



PERCEIVE FRANCHISE

4 202 494

4 088 314

#4



TODAY TOMORROW ALWAYS FRANCHISE

2 136 894

3 547 754

#5








PUR BLANCA FRANCHISE

3 369 412

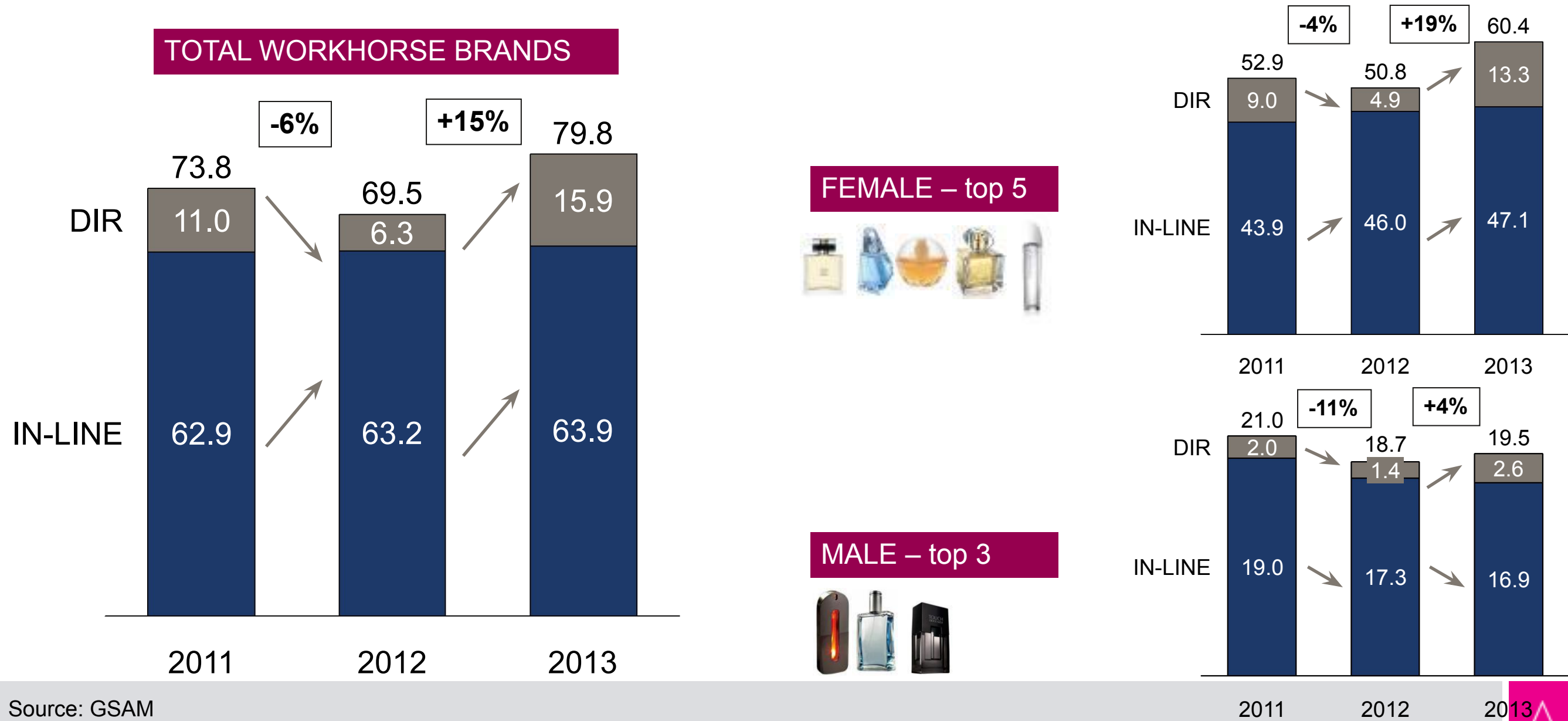
3 275 529

# Top 5 brands – female workhorses RO – TTA as #1

POLAND				
	Brand		2012	2013
#1		TODAY TOMORROW ALWAYS FRANCHISE	3 414 881	4 867 266
#2		LITTLE BLACK DRESS FRANCHISE	2 775 231	3 819 803
#3		RARE FRANCHISE	2 441 068	2 818 657
#4		INCANDESCENCE FRANCHISE	2 010 787	2 216 986
#5		PERCEIVE FRANCHISE	1 980 904	1 698 888

# 2012 and 2013 results clearly indicate that Workhorses growth cannot be achieved without increase in Innovation

## CE WORKHORSES - Gross Sales \$M




# Clear Workhorses Rules of the Road were set for Campaign

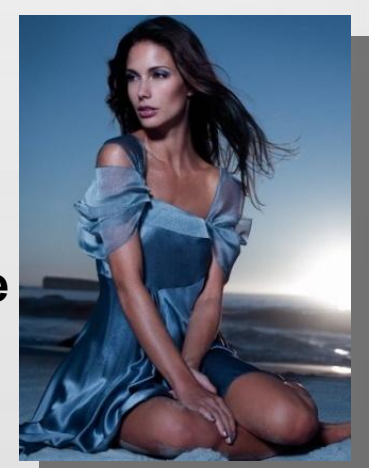
Focus on Workhorses

## & Category Planning and followed in H1 2013


**#1 LBD**



**#2 Perceive**



**#3 Incandescence**



Female  
Upper Mass

STORE	
Full Spread 1xQ	Competitive pricing 39,99 1xQ
Microencapsulation 1xQ	Combination merchandising (1 at 2 at, set) min 1xQ
Platforms exposure with branding: lead or COBO	Maximum 1 workhorse per <b>sell off offer</b>
Olfactive claims and perfumer endorsement	Give away – only flankers or ancillaries
Line extensions on <b>HOOK &amp; gate crushers</b> to drive trial	

**FOCUS**  
in Store

PORTFOLIO	
Layering: Roll-ons, Body Sprays	Flanker - every year for minimum 2 workhorses
Deo: fragrance + protection claims (roll-ons)	Ancillaries - every year
Entry to category: purse sprays, rollettes	Limited Edition / Decanter min every 2 <sup>nd</sup> year
Try It Demo w/micro on Flankers	Refresh Creative every 3 <sup>rd</sup> year
Giftable proposals for X-mass: door openers to category on top of sets	30ml promotionals - min 2 workhorses every year

**BALANCE**  
Price & Promo

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**EXTEND**  
Brand Usage

PORTFOLIO	
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**LEVERAGE**  
Innovation

# Men's Upper Mass Workhorses Rules of The Road

## #1. Full Speed



## #2. Black Suede



Male  
Upper Mass

### STORE

**Full Spread** 1xQ

**Microencapsulation**  
1xQ

**Platforms** exposure with branding: lead or COBO

**Olfactive claims** and **perfumer** endorsement

Line extensions on **HOOK & gate crushers** to drive trial

**FOCUS**  
in Store

**Competitive pricing**  
39,99 2xY

**Combination merchandising** (1 at 2 at, set) min 1xQ

Maximum 1 workhorse per **sell off offer**

**Give away** – only flankers, ancillaries, promos

**BALANCE**  
Price & Promo

### PORTFOLIO

**Entry to category** Body Sprays & roll-ons

**Deo:** fragrance + 24h protection claim; odor control

**Try It Demo w/micro** on Flankers

**New form groups** to be introduced (EDC, DNS)

**EXTEND**  
Brand Usage

**Flanker** every year

**Ancillaries** - every year

**Limited Edition / Decanter** min every 2<sup>nd</sup> year

**Refresh Creative** every 3<sup>rd</sup> year

**30ml promotionals** - min 2 workhorses every year

**LEVERAGE**  
Innovation

# LBD brand as a great example of Workhorse build plan throughout the year with \$3M incremental sales generated in 1H'13

1H 2013



**Q1**  
2 x focus with branding and microencapsulation

**Q2**  
Launch of body mist on back cover

**Q2**  
**BRAND EVENT** with new! Little Gold Dress & commission program for all EDPs  
CE: \$2,1M (in one campaign)

2H 2013



**Q3**  
Launch of 30 ml promotional on Back Cover



2 x focus with micro



**Q4** giftset with new ancillary

# Successful Workhorse-focus strategy in 1H 2013 leveraged the strenght of ‘local jewels’

Romania-specific focus on RARE franchise in 1H 2013 brought 32% growth of the brand and \$0,3M incremental sales for the market



**C3 RO: \$0,1M**



**C5 RO: \$0,16M**



**C7 RO: \$0,18M**



**C8 RO: \$0,16M**



**C4 RO: \$0,034M**



**C6 RO: \$0,06M**

# PL: LBD C9 2013 – the majority of sales went through the commission program

- Core brochure – 27% of total sales
- Avon Focus – 72% of total sales through commission program



Core brochure – \$0,23MM



Commission – \$0,59MM





# RO: LBD C9 2013 – the majority of sales went through core brochure

- Core brochure – 60% of total sales

- Avon Focus– 35% of total sales through commission program



- Core brochure – \$0,34MM



- Commission– \$0,19MM

# KEY SUCCESS FACTORS

IN-LINE - WINNING MIX



Focus on workshores



Pricing & merchandising strategy



Brochure exposure



Balance of net and unit generators



Communication & creative execution

# Addressing strategic price-points and following rigid flow-rules is crucial to success in Fragrance category in Female segment

<b>FEMALE</b>	<b>VALUE</b>	<b>LOWER MASS</b>	<b>UPPER MASS</b>	<b>MASSTIGE</b>
<b>SEGMENT SIZE</b> RETAIL vs AVON	24% vs 25%	4% vs 22%	15% vs 33%	39% vs 15%
<b>PRICE</b>	> 24,99 PLN	24,99 – 35 PLN	35,99 – 49,99 PLN	50 – 79,99 PLN
<b>COMPETITION</b>	DNS, Bi-Es, La Rive	Playboy, Adidas 30ml	Playboy, Adidas 50ml, Coty classics, C-Thru	Elizabeth Arden, Celebrity brands, Puma, Mexx
<b>AVON KEY PRICE POINTS</b>	19,99 PLN	29,99 PLN	39,99 PLN 49,99 PLN	55 PLN / 69 PLN
<b>KEY BRANDS</b>	Summer White	Pur Blanca, Celebre, Passion Dance	LBD, Perceive, Incandescence	Fergie, City Rush, Instinct , TTA
<b>FLOW STRATEGY</b>	<ul style="list-style-type: none"> <li>2 x Q at <b>19,99</b> w/ micro</li> <li>1 x Q penetration price 17,99</li> </ul>	<ul style="list-style-type: none"> <li>1 x C <b>29,99</b> w/ micro</li> <li>1x Q Any 2 For 55,99</li> <li>1 x Q COBO/ bridge/ penetration offer 19-24,99</li> </ul>	<ul style="list-style-type: none"> <li>1 x C <b>39,99</b> w/ micro rest flows at 49,99</li> <li>1 x C Set 59,99 micro</li> <li>2 x Q Any 2 for 86</li> <li>1 x Q penetration offer (37,99)</li> </ul>	<ul style="list-style-type: none"> <li>TTA:</li> <li>1 x Q at 79</li> <li>2 x Y 65</li> <li>2 x Y: any 2 for 120</li> <li>2 x Y COBO/ bridge 60</li> </ul>

35 \*NOT INCLUDED – Premium segment above 80PLN (18% of retail vs 5% Avon)

\*\* Based on PL pricing & market data (source: Nielsen retail audit)



# ... and in Male segment

<b>MALE</b>	<b>VALUE</b>	<b>LOWER MASS</b>	<b>UPPER MASS</b>	<b>MASSTIGE</b>
<b>SEGMENT SIZE</b> RETAIL vs AVON	24% vs 13%	5% vs 34%	27% vs 41%	24% vs 11%
<b>PRICE</b>	> 24,99 PLN	24,99 – 35 PLN	35,99 – 49,99 PLN	50 – 79,99 PLN
<b>COMPETITION</b>	La Rive, Jean Marc, Bi-Es	-	Adidas, STR 8, Playboy	Mexx, Pierre Cardin, Puma, Beckham
<b>AVON KEY PRICE POINTS</b>	19,99 / 24,99 PLN	29,99 PLN	39,99 PLN 49,99 PLN	55 PLN / 70 PLN
<b>KEY BRANDS</b>	Pro / X-Series	Individual Blue, Just Play	Full Speed, Black Sued Touch, Gentelman	City Rush, Instinct, TTA
<b>FLOW STRATEGY</b>	<ul style="list-style-type: none"> <li>1 x Q at <b>19,99 / 24,99</b></li> </ul>	<ul style="list-style-type: none"> <li>1 x C <b>29,99</b> w/ micro</li> <li>2 x Y Any 2 For 55</li> <li>1 x Q special offer 27,99</li> <li>6 x Y Ind. Blue set 49,99</li> </ul>	<ul style="list-style-type: none"> <li>1 x C <b>39,99</b> w/ micro, rest 47,99-49,99</li> <li>2 x Y PWP 34,99 micro</li> <li>4 x Q Any 2 for 86</li> <li>4-6 x Y set</li> </ul>	TTA: <ul style="list-style-type: none"> <li>1 x Q at 60</li> <li>2 x Y 50 - 55</li> </ul>

Clearly defined pricing corridors were executed in each campaign of 1H 2013, contributing to overall category results in the quarter

C7 example

Mother's Day section

VALUE 19,99



LOWER MASS 29,99



UPPER MASS 39,99



SET PRICE 59,99



MASSTIGE 75

# KEY SUCCESS FACTORS

IN-LINE - WINNING MIX



Focus on workshores



Pricing & merchandising strategy



Brochure exposure



Balance of net and unit generators



Communication & creative execution

# Successful performance of in-line brands in 1H 2013 was ensured by category focus on major strategic platforms in each campaign

## BROCHURE COBO – to increase consumer spend



C1

CE: \$0,84M



C5

CE: \$0,9M



C6

CE: \$0,58M



C8

ROMANIA only: \$0,2M

# Fragrance EDT's were promoted in bridge offers in order to boost activity in consecutive campaigns

## BRIDGE OFFERS – to increase activity



C1

Rare Gold in  
Romania&Moldova: \$252k



C7

Summer White in Romania & Moldova: \$216k  
Infinite Seduction in rest of markets: \$281k



C9

Celebre in Amber: \$796k



... as well as exposed on other key brochure platforms to address seasonality and support campaign & category KPIs

BACK COVER



C4

LEAD



C2 – Valentine's Day

GATE CRUSHER



C6 RO



C9 PL

# KEY SUCCESS FACTORS

IN-LINE - WINNING MIX



Focus on workshores



Pricing & merchandising strategy



Brochure exposure



Balance of net and unit generators



Communication & creative execution

# Fragrance store success lays in balanced merchandising (1)

Most productive 'Buy 1 at buy 2 at' offer on EDTs used on average every third campaign to increase consumer spend & generate profit



C4

PL: \$0,4M  
RO:\$0,1M



C6

PL: \$0,25M  
RO:\$0,22M



C9

PL: \$0,37M  
RO:\$0,17M

# Fragrance store success lays in balanced merchandising (2)

Unit-driving ancillaries promotions on campaign's Hook offers or Back Cover, serving also as entry to the category & driving penetration – must have in every campaign



C1



C2



C3



C4 backcover



C5



C6



C7



C8 backcover



C9

# Fragrance store success lays in balanced merchandising (3)

Virtual sets with EDP / EDT and ancillaries to build on layering experience and / or gifting behaviour



C2

Set with EDT + purse spray + body spray



C6

Set with + EDT body wash + deo



C8

Set with rollete



C4

Set with roll on or rollete – you choose your gift

# KEY SUCCESS FACTORS

IN-LINE - WINNING MIX



Focus on workshores



Pricing & merchandising strategy



Brochure exposure



Balance of net and unit generators



Communication & creative execution

# Focus on branding and consumer insight related communication, combined with seasonally relevant creative execution & story are key factors in Fragrance

## Branding

- Brand positioning
- Branding model
- Communication: brand promise / personality type / key brand words

## Seasonal story

- Occassion-related
- Season-related
- Other - based on consumer insight

## Category relevant

- Fragrance notes
- Olfactive pyramid
- Perfumer

# 1H 2013 successful creative execution & communication examples (1)

- Branding
- Brand positioning
  - Branding model
  - Copy related to brand promise / personality type / key brand words
  - MUST HAVE in every campaign





# 1H 2013 successful creative execution & communication examples (2)

- Seasonal story
- Occassion-related
  - Season-related
  - Other - based on consumer insight



C7 Mother's Day section



C2 Valentine's Day male section



C8 Father's Day male section



C8 Tips & tricks for summer

# 1H 2013 successful creative execution & communication examples (3)

Category relevant

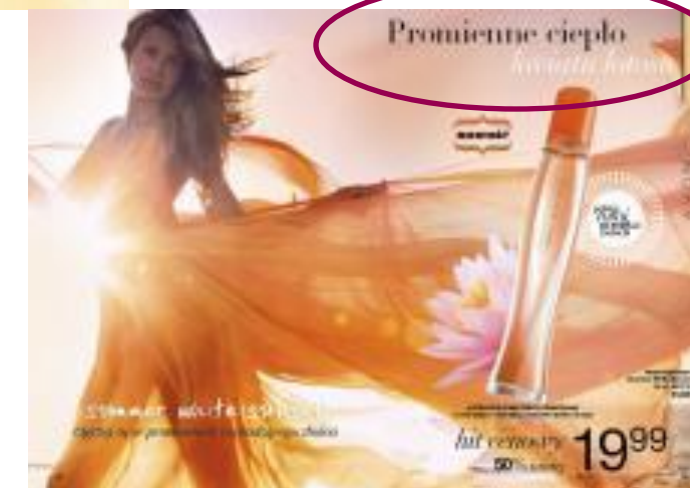
- Fragrance notes
- Olfactive pyramid
- Perfumer



Olfactive pyramid explanation



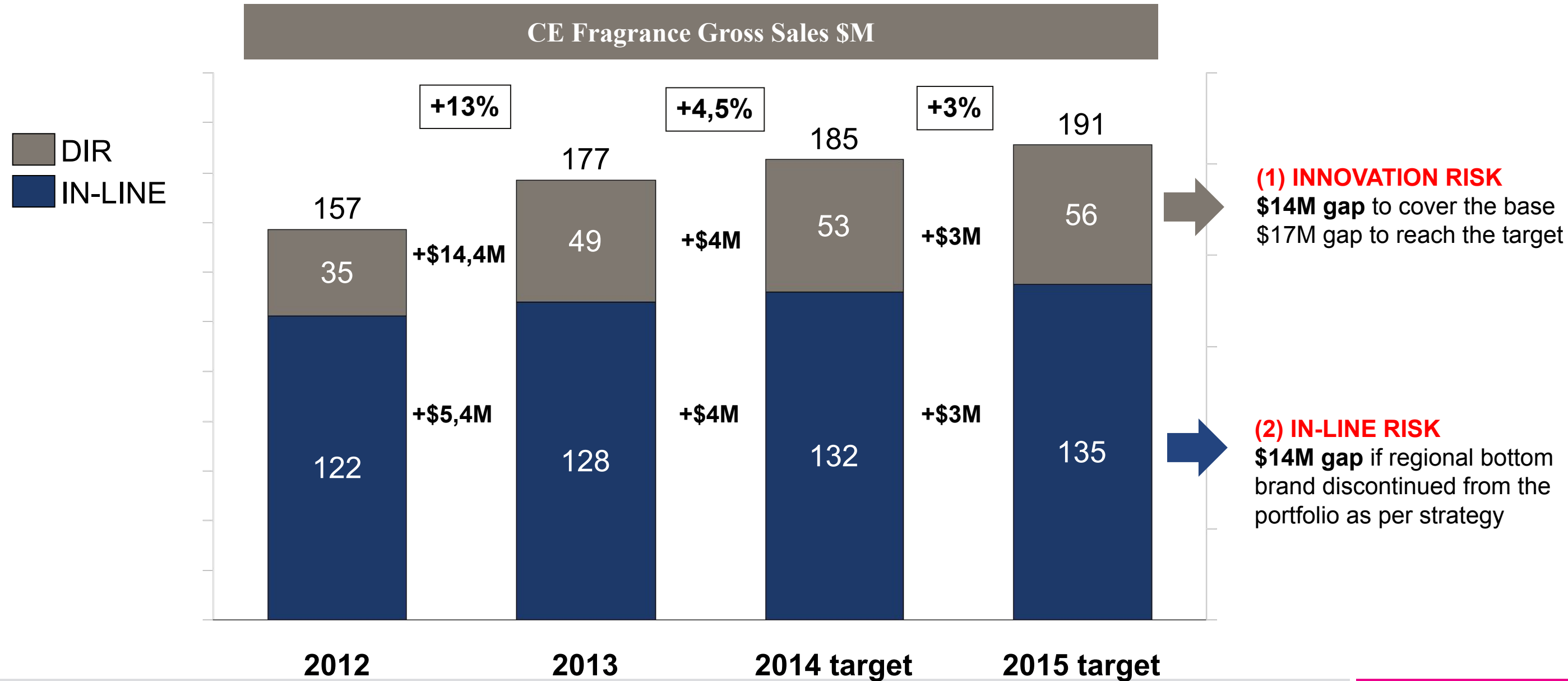
Perfumer quote to support major launch



Fragrance notes in main headline (plus ALWAYS next to the product)

# 2015 Situation assessment











# CE aspiration is to achieve the level of \$191M sales from Fragrance category in 2015 - \$56M should be generated from DIR (+\$3M)



# Appendix

## 2015 Innovation pipeline

# 2015 Innovation Pipeline FEMALE Workhorses & Build Brands – MUST HAVES

WORKHORSES					LOCAL HEROS				NEW BUILD
LBD	Perceive	Incandessence	Pur Blanca	TTA	Summer White	Passion Dance	Rare Pearls	Celebre	Avon Femme
									

## INNOVATION PIPELINE NEEDS

2015	FLANKER/ NEW PILLAR	✓	✓	✓	✓	✓	✓	✓	✓
	PROMOTIONALS 30ML SPRAY/ 50ML DECANTER		✓	✓		✓	✓	✓	✓
	DEO/ LIGHTER VERSIONS	✓				✓			✓
2014	FLANKER	✓	✓	✓	✓	3 Bring Back EDPs	✓		
	PROMOTIONALS 30ML SPRAY/ 50ML DECANTER	✓	✓ 30ml decanter	✓	✓			✓ 30ml decanter	✓
	DEO/ LIGHTER VERSIONS		✓	✓	✓				

○ MUST HAVE, currently not in plan

# 2015 Innovation Pipeline MALE Workhorses & Build Brands – MUST HAVES

## WORKHORSES

## NEW BUILD

Full Speed



Black Suede



Individual Blue



Elite Gentleman



Avon Sport



Avon Aqua



## INNOVATION PIPELINE NEEDS

Year	Product Category	Full Speed	Black Suede	Individual Blue	Elite Gentleman	Avon Sport	Avon Aqua
2015	FLANKER	✓	✓	✓		✓	✓
	PROMOTIONALS DECANTER/ EDC	✓		✓	✓	EDC potentially	✓
	GIFTABLES/ ANCILLARIES	✓	✓	✓	✓	Body Sprays	✓
2014	FLANKER	✓		✓	✓		
	PROMOTIONALS DECANTER/ 30ml/ EDC	✓			✓		
	GIFTABLES/ ANCILLARIES	✓			✓		

○ MUST HAVE, currently not in plan