EXHIBIT 1
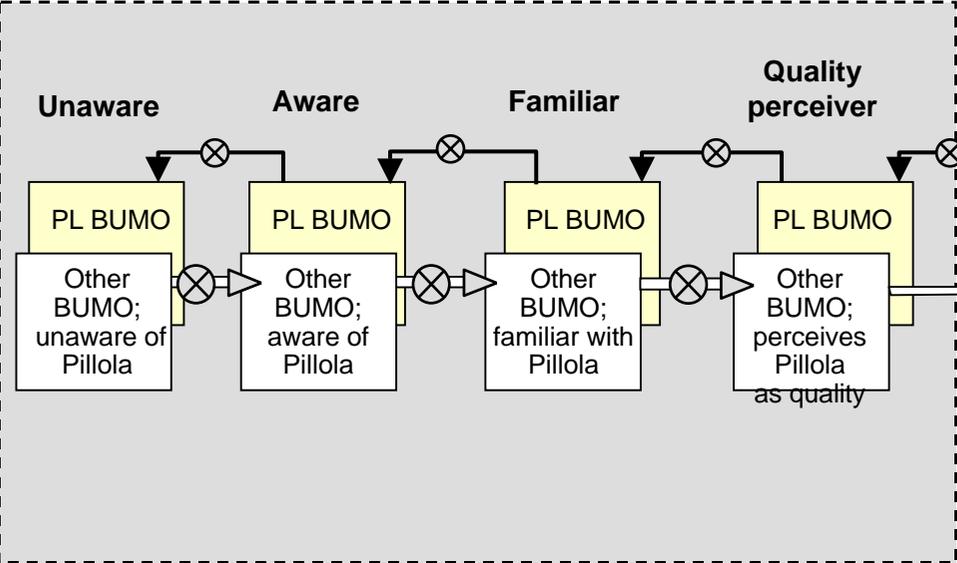

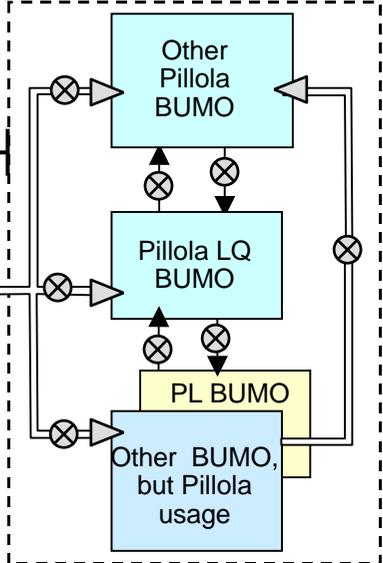**Exhibit 1   Pillola's brand architecture**
Mutually exclusive populations (one person can reside in only one box)

Non-users of Pillola

Unaware | Aware | Familiar | Quality perceiver

PL BUMO | PL BUMO | PL BUMO | PL BUMO

Other BUMO; unaware of Pillola | Other BUMO; aware of Pillola | Other BUMO; familiar with Pillola | Other BUMO; perceives Pillola as quality

Users of Pillola (switch matrix)

Other Pillola BUMO

Pillola LQ BUMO

PL BUMO

Other BUMO, but Pillola usage

Key

Flows

Resources

PL BUMO

Non-Pillola BUMO

Pillola BUMO

Pillola usage non-BUMO

PL   = Private label
LQ   = New formulation
BUMO = Brand used most often

Source: Market research questionnaire, January 2003; weighted sample population n = 5,241

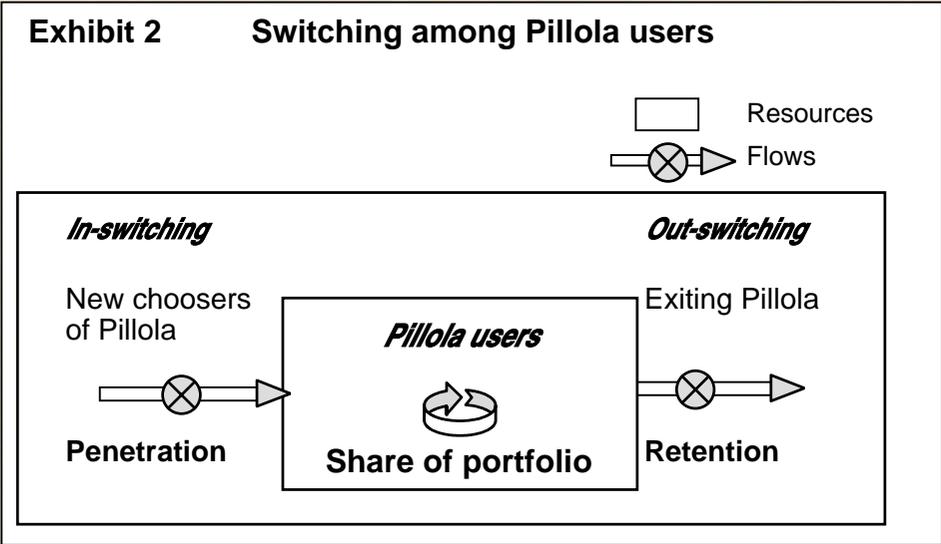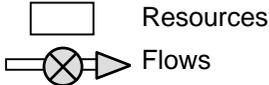**EXHIBIT 2**

Exhibit 2   Switching among Pillola users

Resources

Flows

In-switching   Out-switching

New choosers of Pillola   Exiting Pillola

Pillola users

Penetration   Share of portfolio   Retention

EXHIBIT 3

Exhibit 3   Consumer residency in Pillola's brand architecture

Million people

All resource populations; General population projection
Adult category consumers = 204 million people

Resources

Flows

Users of Pillola (switch matrix)

Non-users of Pillola

| Unaware | Aware | Familiar | Quality perceiver |

1.8
PL BUMO

4.4
PL BUMO

19.7
PL BUMO

10.1
PL BUMO

6.9
Other BUMO;
unaware of
Pillola

9.8
Other BUMO;
aware of
Pillola

34.7
Other BUMO;
familiar with
Pillola

30.1
Other BUMO;
perceives
Pillola
as quality

29.1
Other
Pillola
BUMO

3.7
Pillola LQ
BUMO

PL BUMO **13.8**

40.3
Other BUMO,
but Pillola
usage
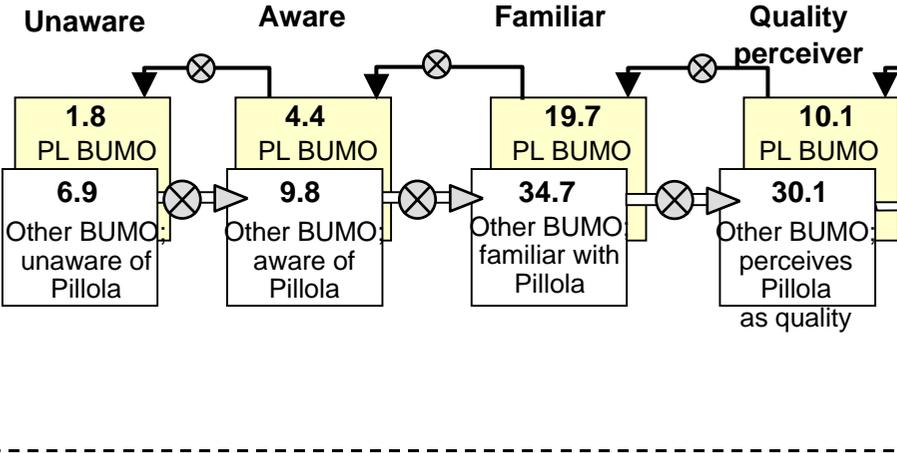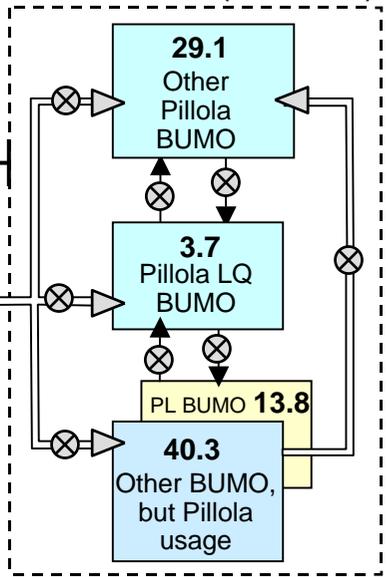
Source: Market research questionnaire, , n = 5,241, 2002; Vanguard analysis

EXHIBIT 4

Exhibit 4   Average residency with brands

Branded competitor A
Generic competitor A
Generic competitor B
Pillola
Branded competitor C
Branded competitor B

Residency after x months

Source: Syndicated Tracking Study (June 2000 to May 2001)

EXHIBIT 5

Exhibit 5   Consumer switching behavior
Annual switching to/from Pillola

Source of in-switching consumers

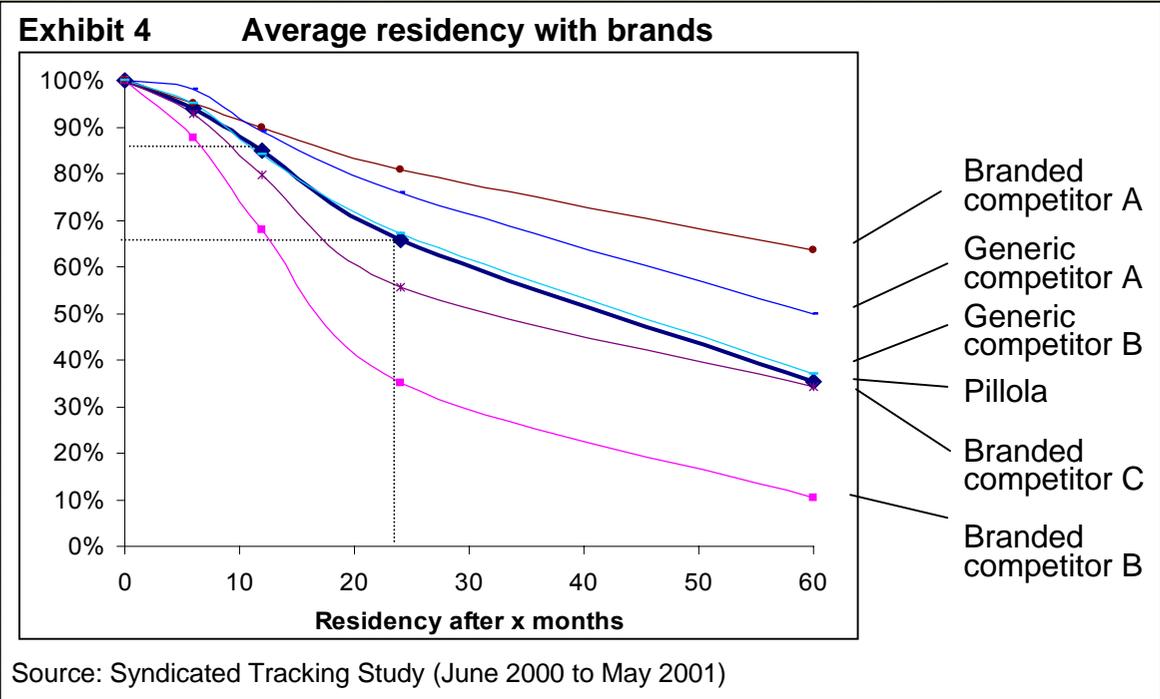| Category	
Pillola	8%
Branded competitor B	5%
Branded competitor A	48%
Branded competitor E	9%
Branded competitor D	7%
Branded competitor C	5%
Private label	9%
Other	9%
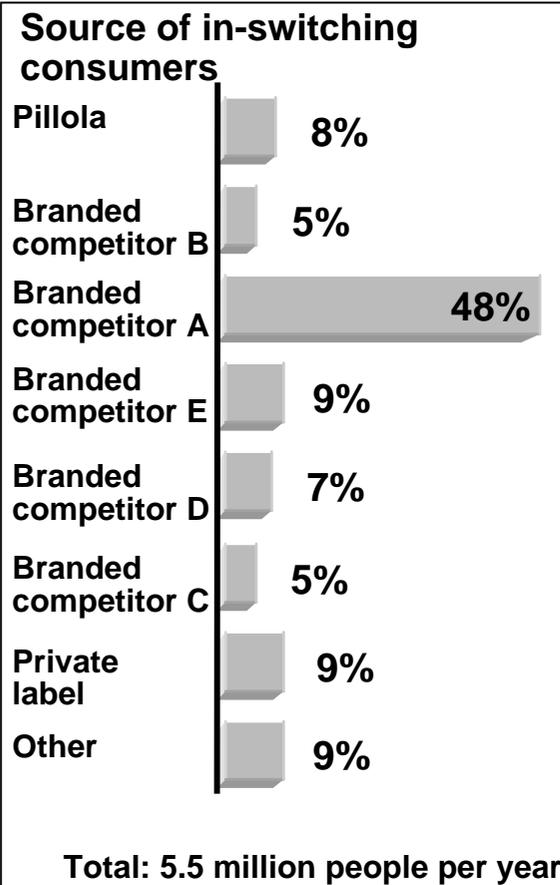
Average consumption: 12 pills per month

Total: 5.5 million people per year

Destination of out-switching consumers

Category	
Pillola	10%
Branded competitor B	17%
Branded competitor A	17%
Branded competitor E	8%
Branded competitor D	2%
Branded competitor C	6%
Private label	32%
Other	8%
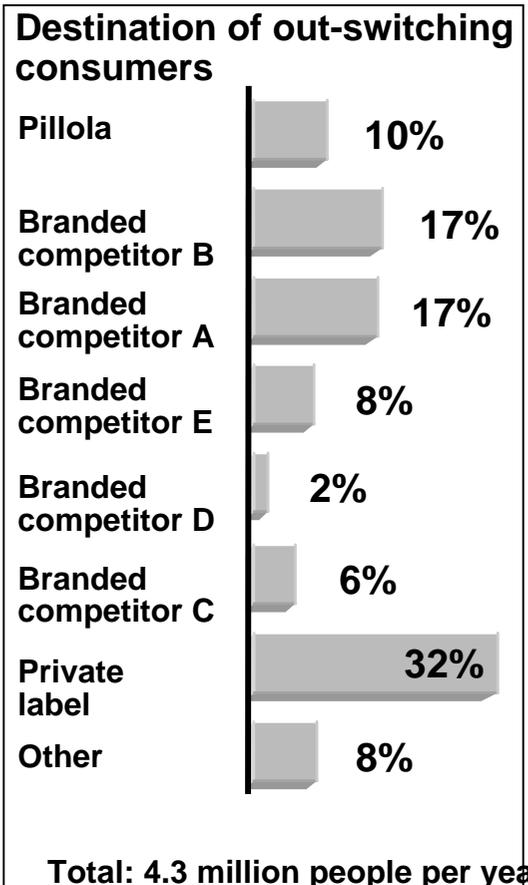
Average consumption: 37.5 pills per month

Total: 4.3 million people per year

Share of requirement

⊗ → **32.8 million Pillola BUMO users** ⊗ →
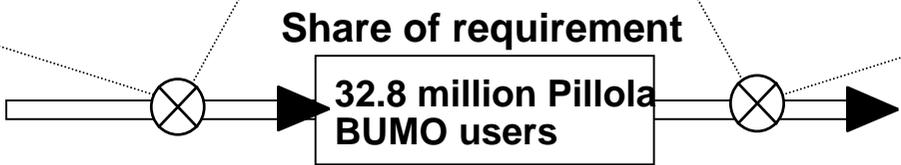
Source: Market research, n=5,241, 2002; Vanguard analysis

EXHIBIT 6

Exhibit 6   Sample profiles of in- and out-switchers

Reason for switch	Switchers from Pillola to Brand B (103)	Switchers into Pillola from Brand B (345)	Switchers from Pillola to private label (182)	Switchers into Pillola from private label(59)
More effective	15.1	33.8	5.0	40.3
Longer lasting	9.1	14.3	0.9	5.1
Quicker	10.1	13.2	1.5	22.8
Recommended by friend / family	4.4	9.8	1.5	4.9
Safety (net)	16.9	8.1	1.1	3.4
Recommended by physician	18.5	6.6	1.3	9.5
Fewer pills to take	2.0	4.9	0.0	1.2
Fewer side effects*	3.5	4.9	0.5	0.6
Coupons	3.1	4.5	0.8	2.1
Other	8.8	3.7	3.4	3.1
New product	0.0	3.4	0.0	4.8
Preferred form	0.0	3.2	0.0	2.6
Safety*	6.4	2.9	0.6	2.7
Price	10.3	2.6	87.1	8.7

* Included within "Safety (net)"
Source: Market research 2002; Vanguard analysis

EXHIBIT 7

Exhibit 7   Chosen segment and Pillola

Country general population, million people

Users of Pillola (switch matrix)

Resources

Flows

Non-users of Pillola

Unaware	Aware	Familiar	Quality perceiver
0.6 PL BUMO	**1.7** PL **BUMO**	**7.8** PL **BUMO**	**2.7** PL **BUMO**
2.6 Other BUMO: unaware of Pillola	**3.9** Other BUMO: aware of Pillola	**16.4** Other BUMO: familiar with Pillola	**10.2** Other BUMO: perceives Pillola as quality

7.2 Other Pillola BUMO

1.4 Pillola LQ BUMO

PL BUMO **4.0**

15.4 Other BUMO, but Pillola usage

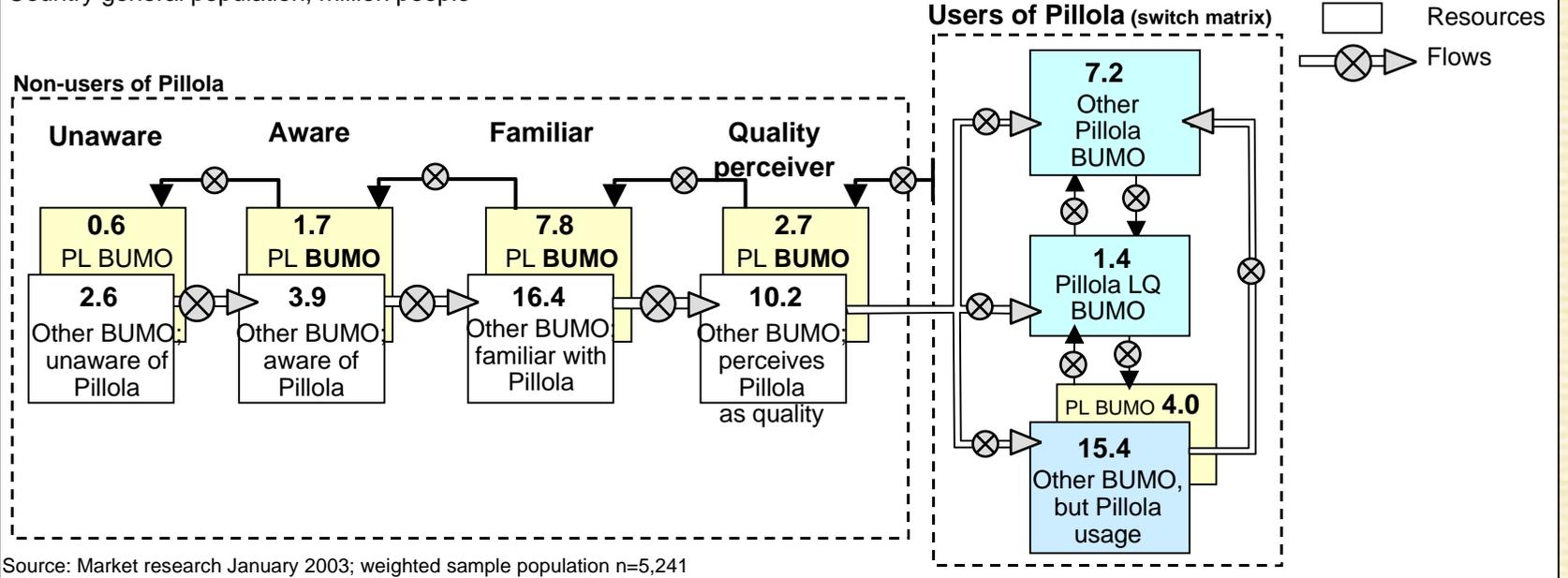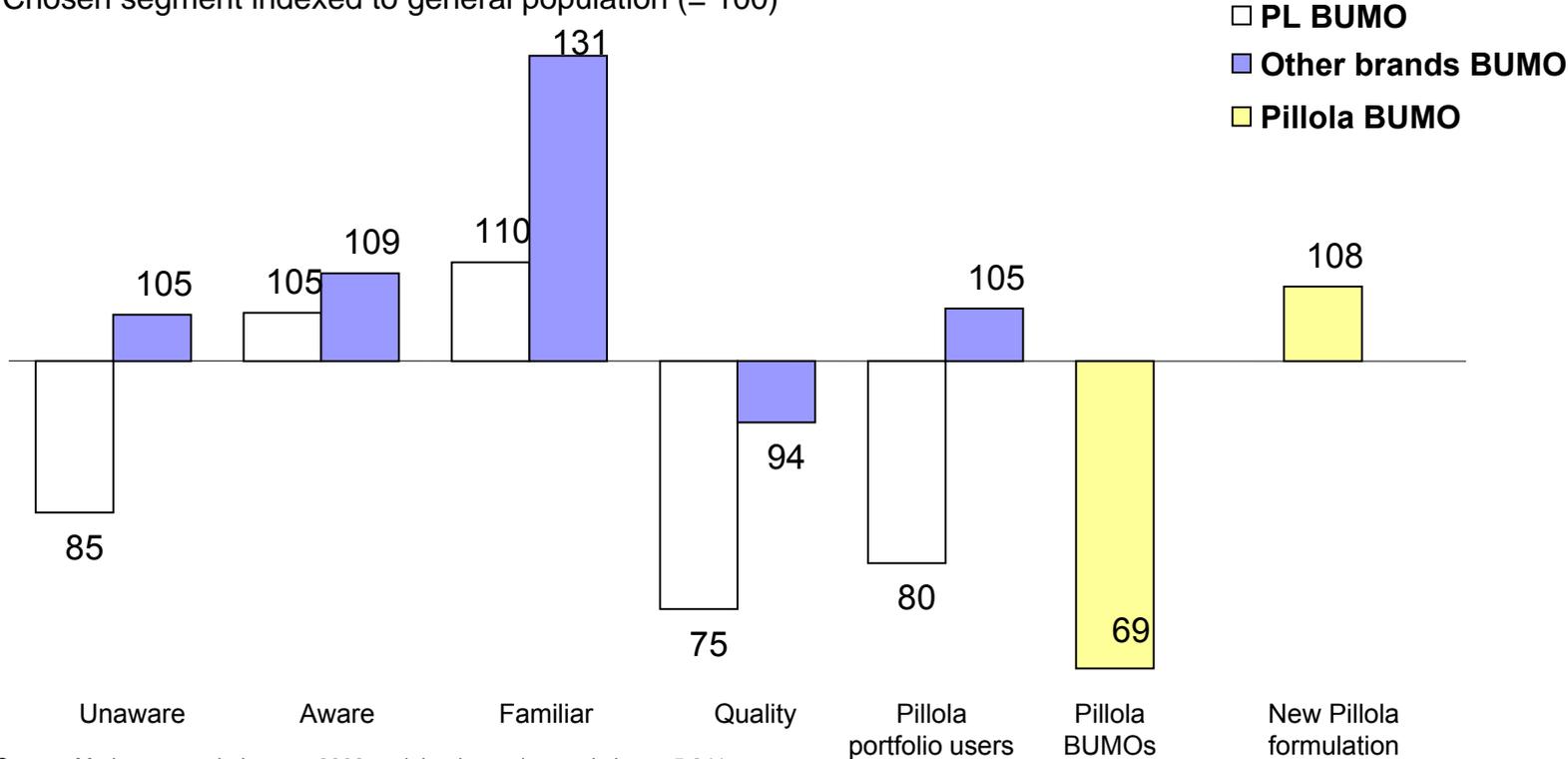Source: Market research January 2003; weighted sample population n=5,241

EXHIBIT 8

Exhibit 8   Comparison of chosen segment and general population
Chosen segment indexed to general population (= 100)

Legend:
- ☐ PL BUMO
- ■ Other brands BUMO
- ☐ Pillola BUMO

Values:
- Unaware: 85, 105
- Aware: 105, 109
- Familiar: 110, 131
- Quality: 75, 94
- Pillola portfolio users: 80, 105
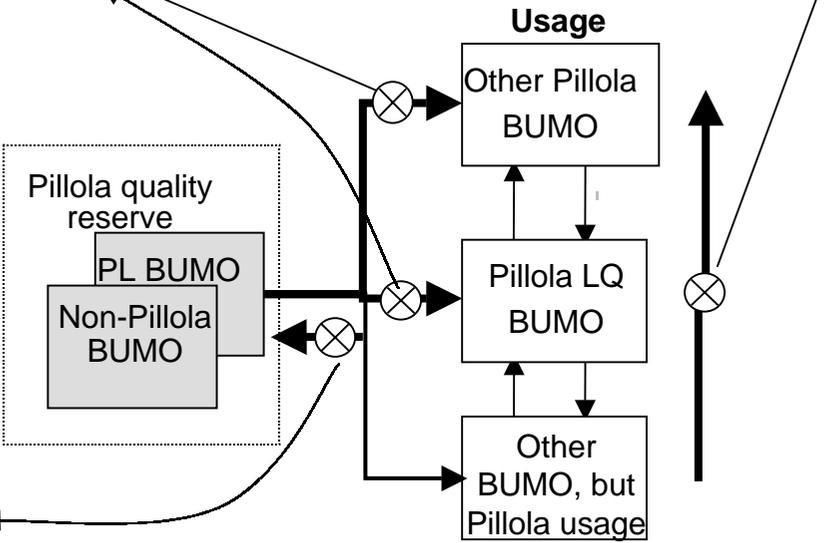- Pillola BUMOs: 69
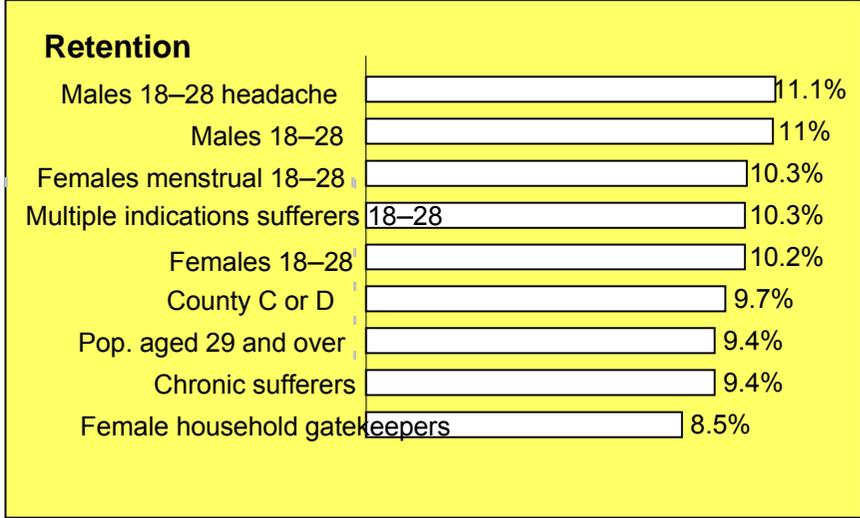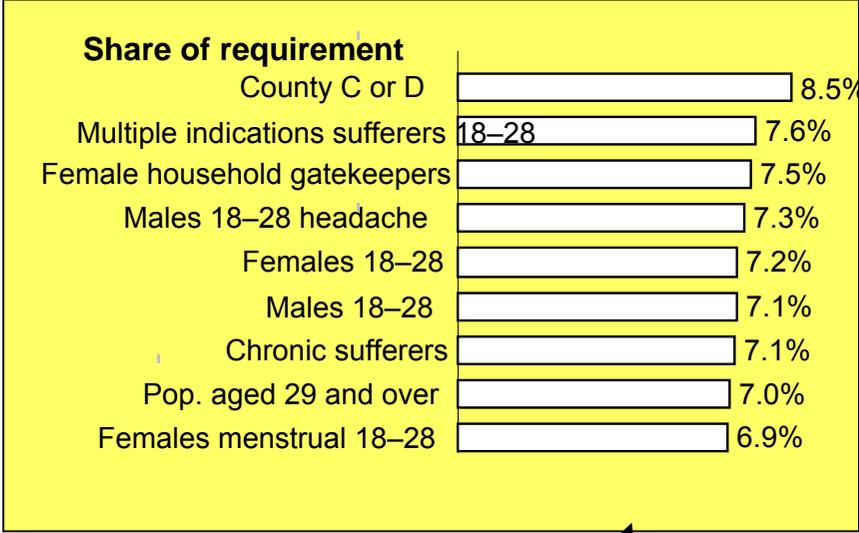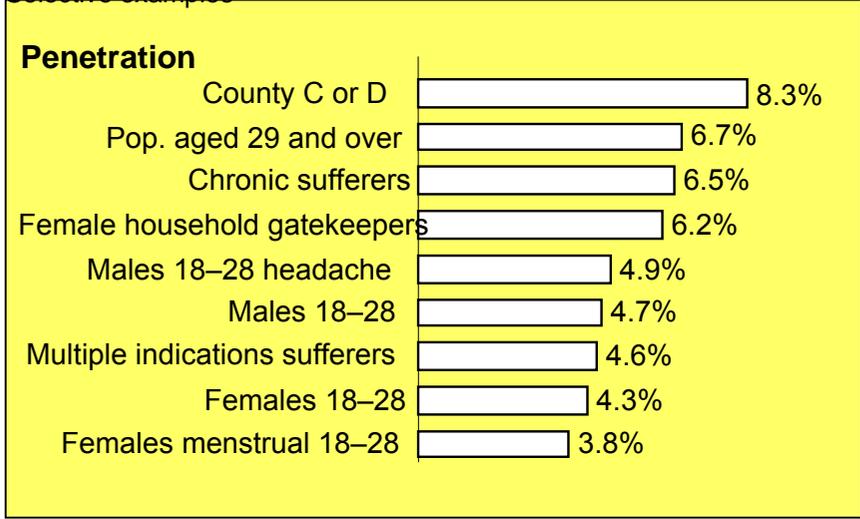- New Pillola formulation: 108

Source: Market research January 2003; weighted sample population n=5,241

EXHIBIT 9

Exhibit 9   Leverage-point analysis by segment

Selective examples

Penetration

Segment	Value
County C or D	8.3%
Pop. aged 29 and over	6.7%
Chronic sufferers	6.5%
Female household gatekeepers	6.2%
Males 18–28 headache	4.9%
Males 18–28	4.7%
Multiple indications sufferers	4.6%
Females 18–28	4.3%
Females menstrual 18–28	3.8%

Share of requirement

Segment	Value
County C or D	8.5%
Multiple indications sufferers 18–28	7.6%
Female household gatekeepers	7.5%
Males 18–28 headache	7.3%
Females 18–28	7.2%
Males 18–28	7.1%
Chronic sufferers	7.1%
Pop. aged 29 and over	7.0%
Females menstrual 18–28	6.9%

Retention

Segment	Value
Males 18–28 headache	11.1%
Males 18–28	11%
Females menstrual 18–28	10.3%
Multiple indications sufferers 18–28	10.3%
Females 18–28	10.2%
County C or D	9.7%
Pop. aged 29 and over	9.4%
Chronic sufferers	9.4%
Female household gatekeepers	8.5%

Usage

Other Pillola BUMO

Pillola quality reserve

PL BUMO

Non-Pillola BUMO

Pillola LQ BUMO

Other BUMO, but Pillola usage

Source: Market research, n=5,241, 2002; Vanguard dynamic analysis

EXHIBIT 10

Exhibit 10   Volume share for private-label and Pillola within the same compound
Adult males, 1999–2002

Legend:
- Pillola - trend
- PL - trend

Y-axis: 0%, 5%, 10%, 15%, 20%, 25%, 30%

X-axis (Age): 18-19, 20-21, 22-23, 24-25, 26-27, 28-29, 30-31, 32-33, 34-35, 36-37, 38-39, 40-41, 42-43, 44-45, 46-47, 48-49, 50-51, 52-53, 54-55, 56-57, 58-59, 60-61, 62-63, 64-65, 66-67, 68-69, 70-71

Age

Source: Syndicated 2000–2002 averages polynomial trend; Vanguard analysis