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From Online Display to Quaker Instant Oatmeal In-Store Sales

Google/Nielsen
U.S., 2010

Quaker Case Study Summary

Quaker's Challenge:

Boost slumping oatmeal sales by re-connecting consumers with the joys of eating oatmeal and reinvigorating oatmeal as a meal or snack option.

Solution:

Quaker Oatmeal taps into YouTube's entertainment platform and highly engaged audience to convey the "Quaker Oatmeal Experience" in a fun, participatory environment, creating a memorable experience for the proactive wellness seeker consumers. Content from Good Bite and production from Deca help create a robust online platform.

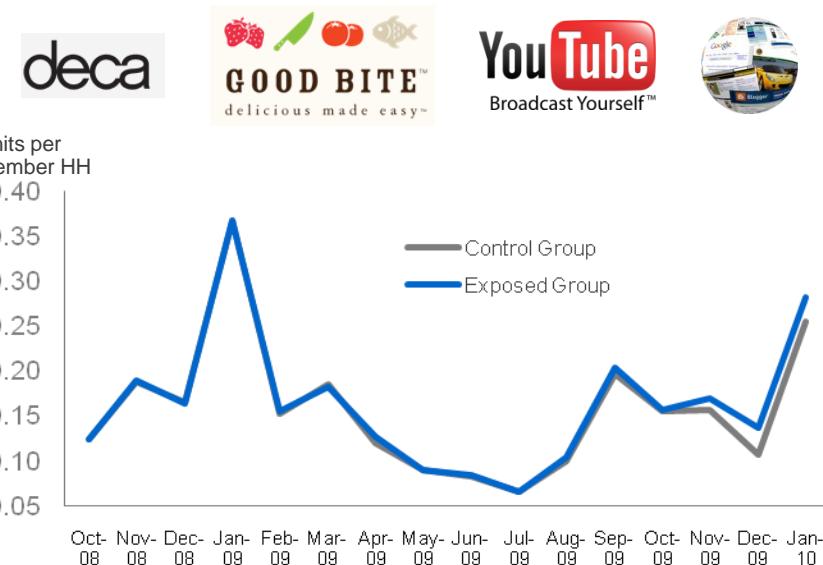
Summary of Results:

The campaign had a **significant impact** on the Quaker Instant Oatmeal business.

- Unit sales were +9% greater among households exposed vs. not exposed;

The campaign had a directional impact on the Private Label Instant Oatmeal business.

- Unit sales were -8% lower among households exposed vs. not exposed



Source: Quaker Instant Oatmeal Display Case Study,
Nielsen Offline Sales Impact Analysis , March 2010

Campaign Overview

Overview

- In fall of 2009, Quaker featured Quaker Instant Oatmeal in a 15 week on-line marketing campaign. Ads promoting this product were served to Google website visitors.

Objective

- To steal share from Private Label Instant Oatmeal.

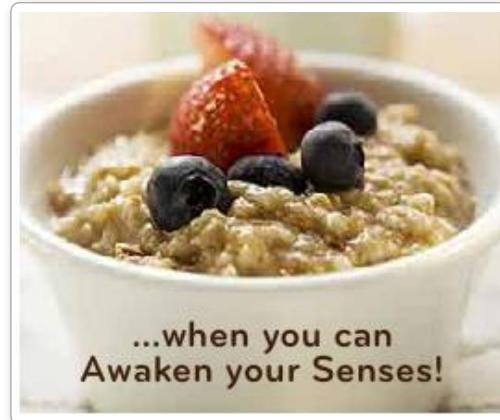
Dates & Impressions:

- September 15, 2009 - December 31, 2009, 120.4MM Impressions

Media Messaging

- Messaging focused on promoting the great taste and creativity possible with Quaker Instant Oatmeal :
 - “Why settle for great taste alone...when you can Awaken your Senses!”
 - “Discover amazing Quaker Oatmeal creations...”
- Creative used rich media, and included key message, picture of product with brand name, and link to voting website.

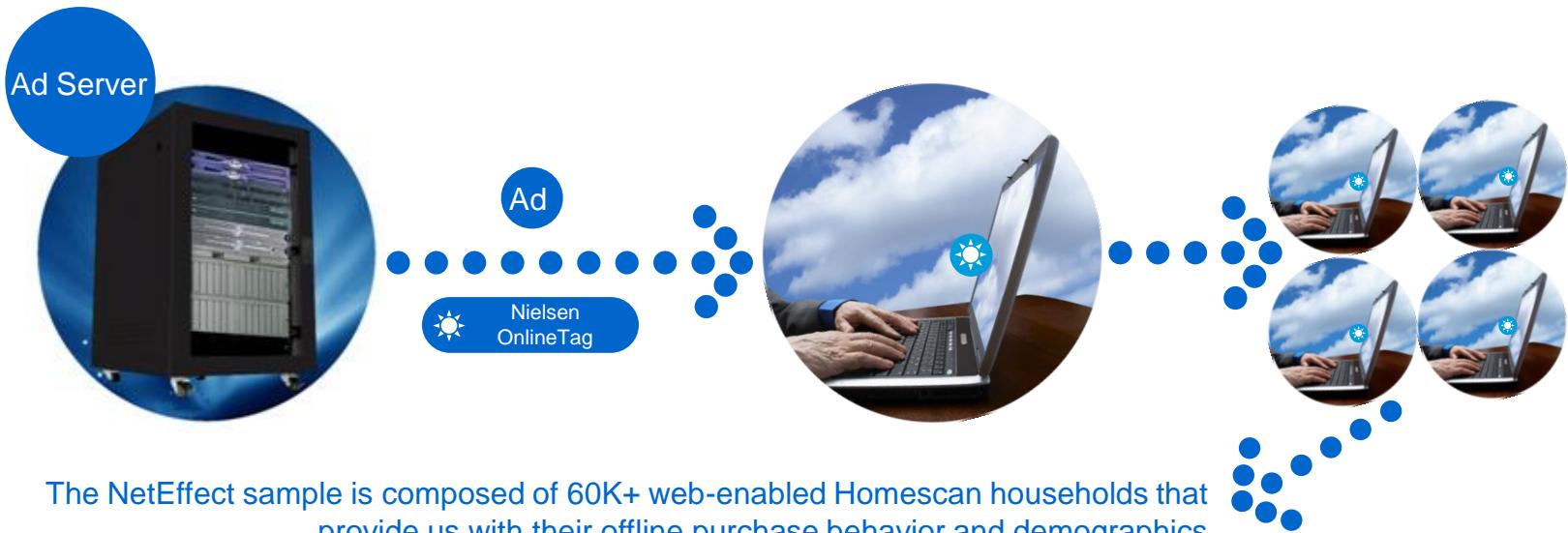
Campaign Creative Units



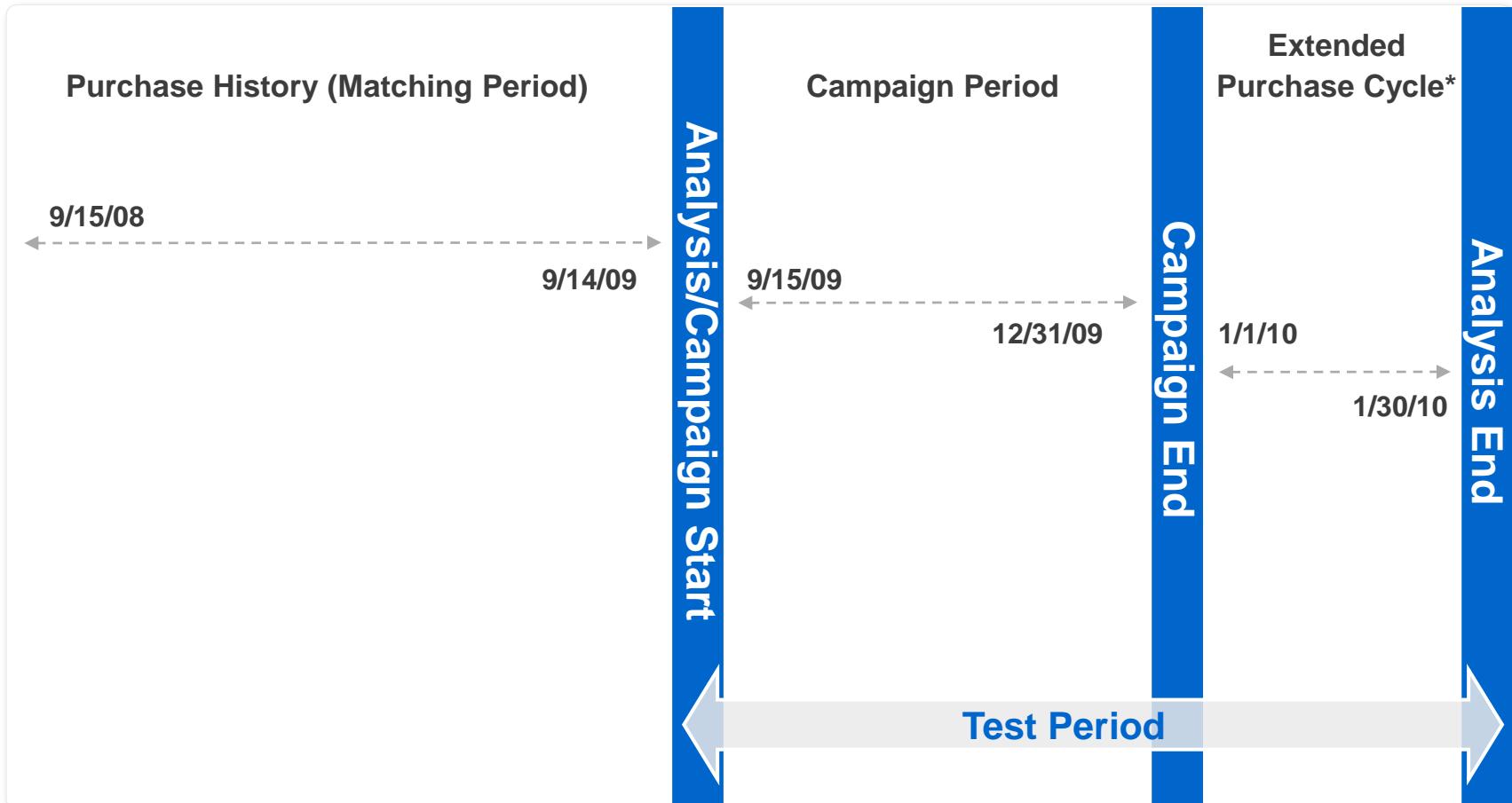
Methodology: How Does Nielsen NetEffect Work?

- 1 Plan your online display ad campaign across various sites and portals best fit to your brand/campaign objectives and target market
- 2 Build your online creative executions/ad units
- 3 Embed Nielsen Online's "tag" into each creative ad unit...

"Tagged" ads are seen by millions – thousands of whom are in Nielsen's 'NetEffect' sample

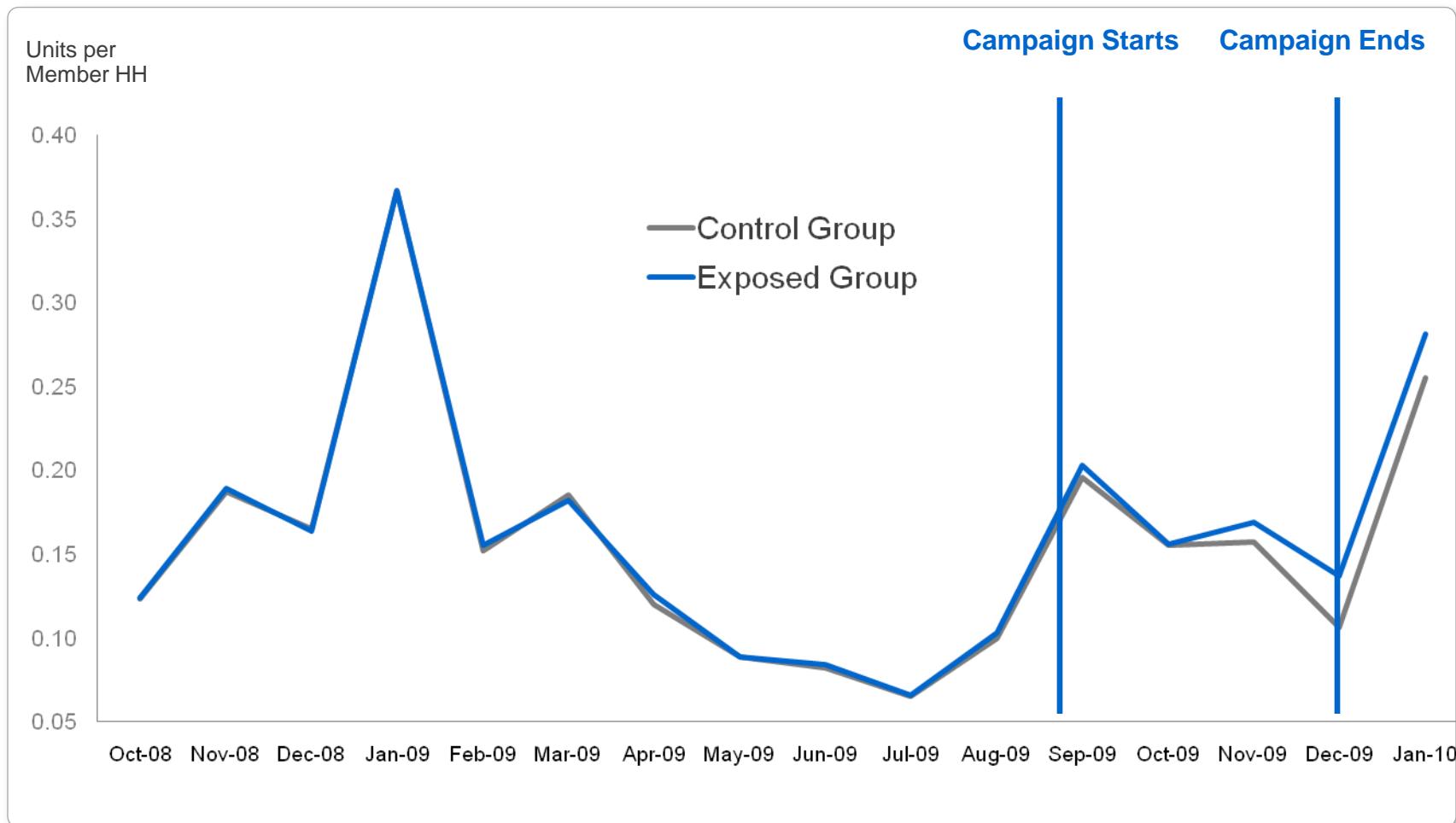


Analysis Timeline

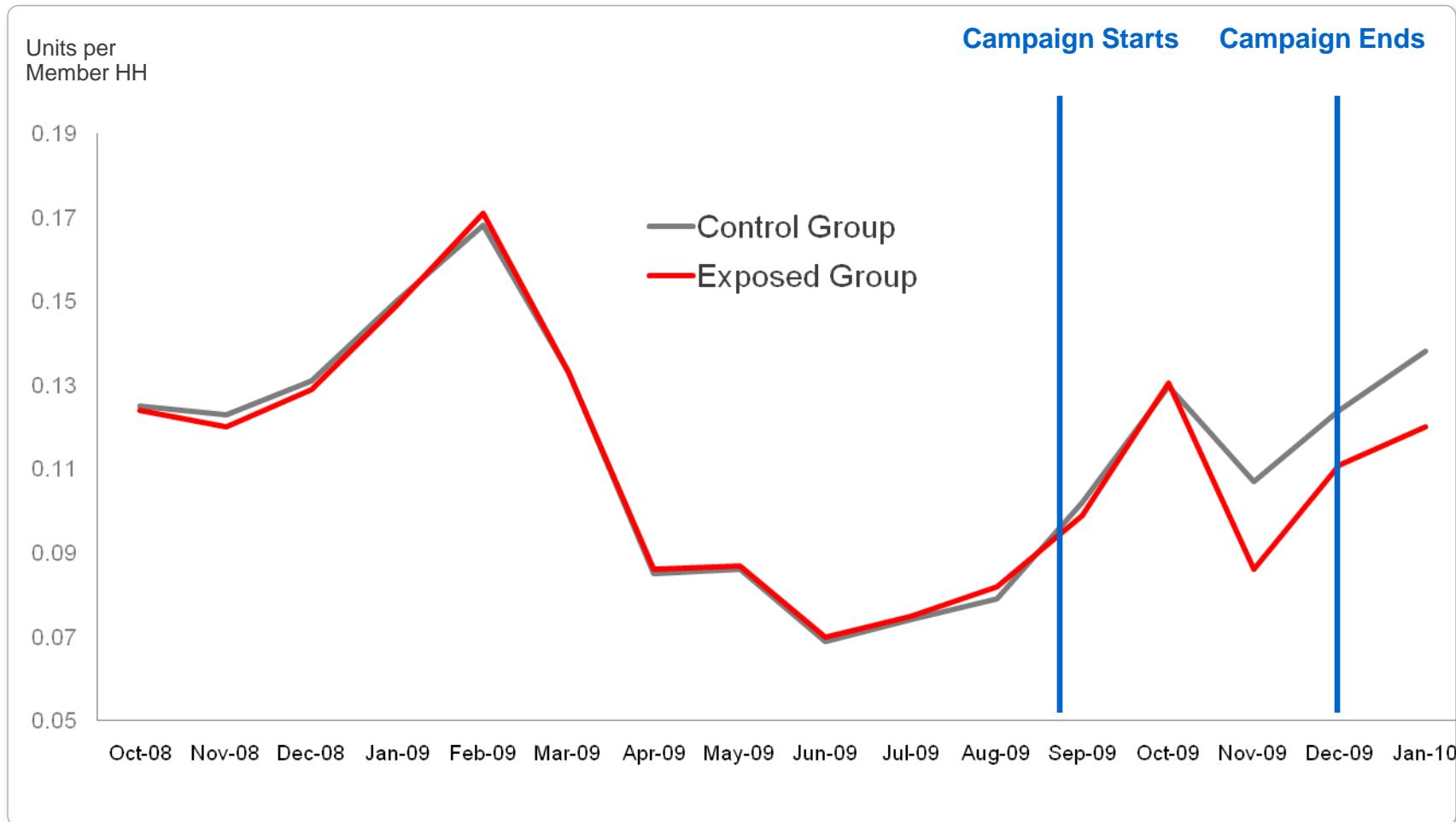


Note: *The extended purchase cycle was included to capture any delayed advertising effect and to accommodate individual purchase cycles (category purchase cycle approx 62 days)

Quaker Instant Oatmeal Unit Trend



Private Label Instant Oatmeal Unit Trend

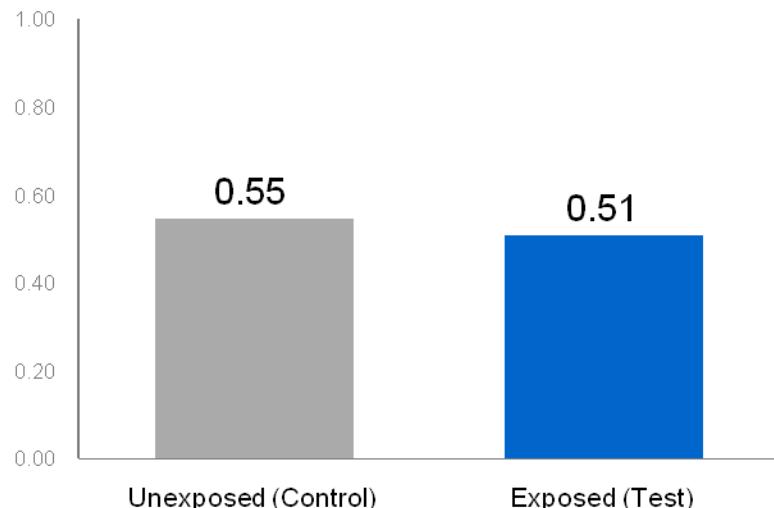


Sales Impact – Unit Purchases

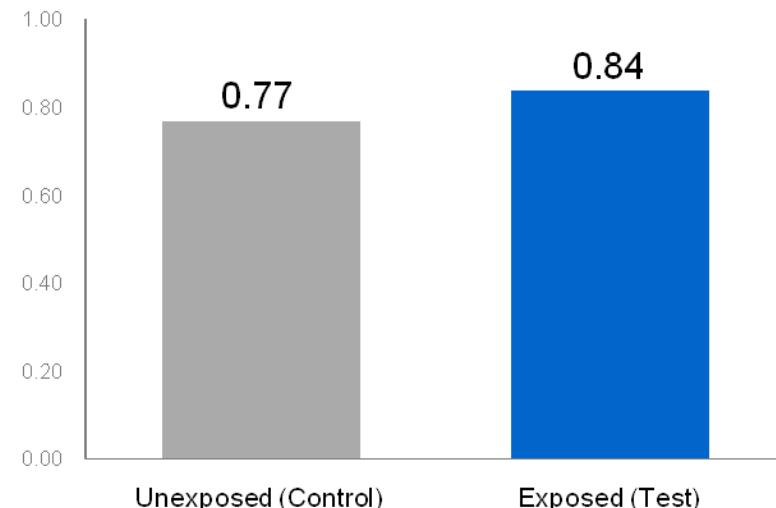
September 15, 2009 - January 30, 2010

Households that were in the exposed group purchased 9% more Quaker and less Private Label Instant Oatmeal than those that were not exposed.

Private Label Instant Oatmeal



Quaker Instant Oatmeal



Point Difference: -0.04
Percent Difference: (8%)
Significance level: 90%***

+0.07
+9%
91%***

Source: Quaker Instant Oatmeal Display Case Study, Nielsen Offline Sales Impact Analysis , March 2010
(Average Unit purchase per panel = total units divided by # households per panel (includes non-buyers))

** Directional ***Significant at 90% Level

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Core Four of Homescan Panel Data

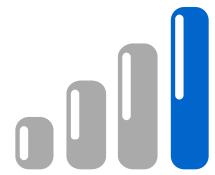


Total Sales =

How many buyers?
Penetration



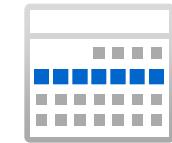
How much are they buying?
Buying Rate



How much do they buy
on each occasion?
Purchase Size



How many times are
they buying it?
Purchase Frequency

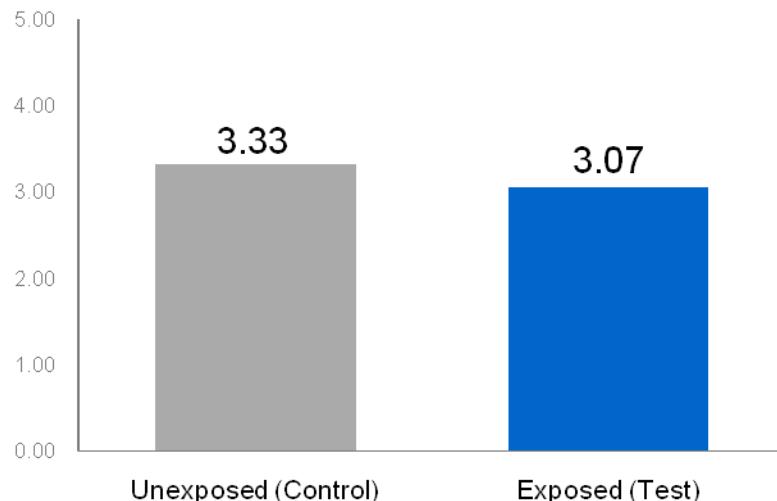


Sales Impact – Unit Buying Rate

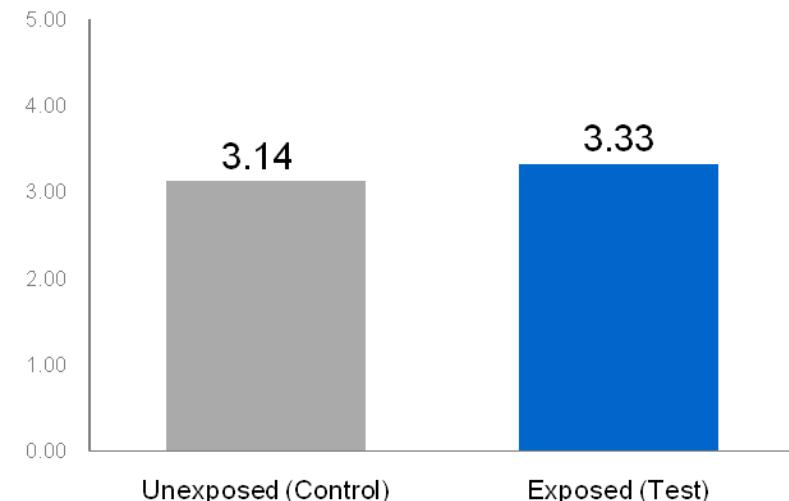
September 15, 2009 - January 30, 2010

Households that purchased in the exposed group purchased significantly more Quaker Instant Oatmeal and significantly less Private Label Instant Oatmeal than those that were not exposed.

Private Label Instant Oatmeal



Quaker Instant Oatmeal



Point Difference: -0.26
Percent Difference: (8%)
Significance level: 92%***

+0.19
+6%
91%***

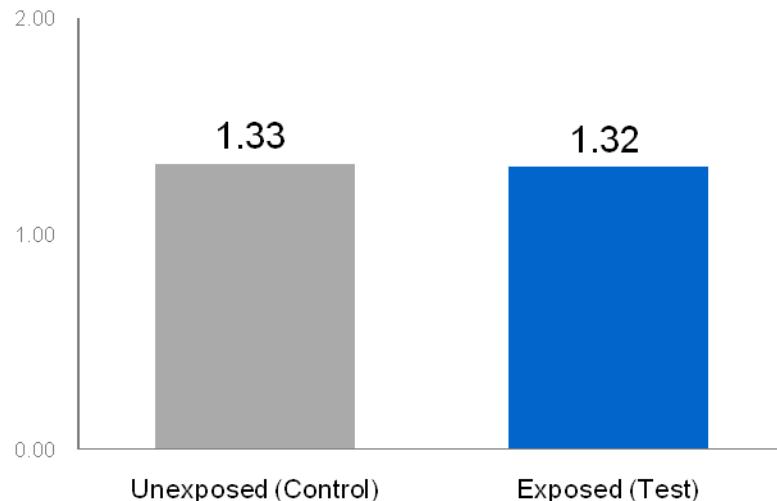
Source: Quaker Instant Oatmeal Display Case Study, Nielsen Offline Sales Impact Analysis , March 2010
(Average Unit purchases among buying households) ** Directional ***Significant at 90% Level

Sales Impact – Unit Purchase Amount

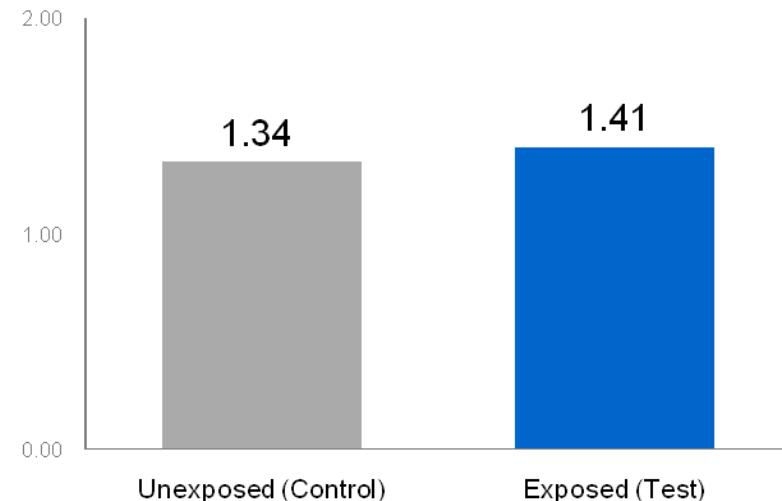
September 15, 2009 - January 30, 2010

Households exposed to the advertisement spent significantly more on Quaker Instant Oatmeal on each buying occasion than households that were not exposed. This contributed to the overall impact in buying rate and sales for the item.

Private Label Instant Oatmeal



Quaker Instant Oatmeal



Point Difference: -0.01

Percent Difference: (1%)

Significance level: 13%

+0.07

+5%

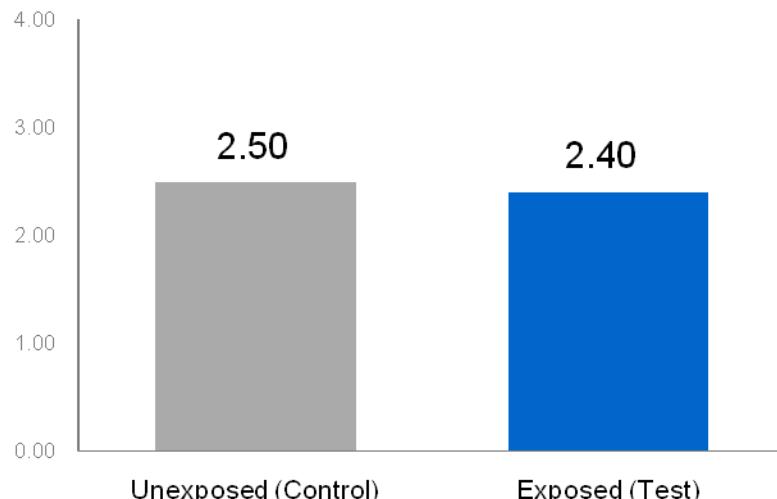
93%***

Sales Impact – Purchase Frequency

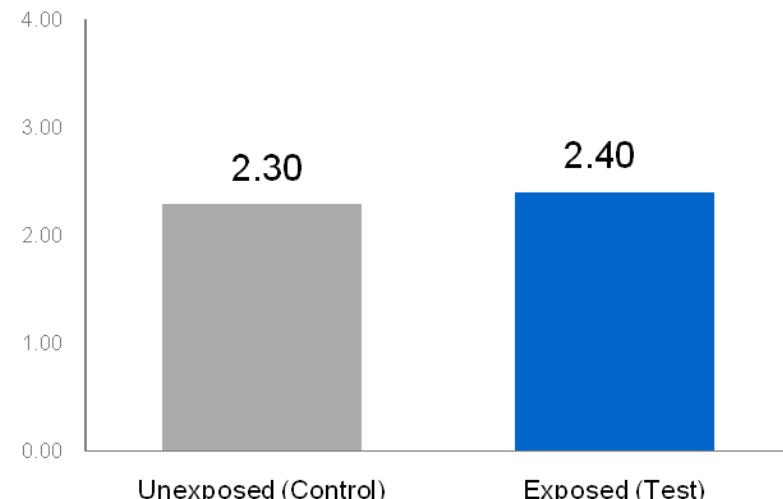
September 15, 2009 - January 30, 2010

Exposure to the advertisement created significantly less frequent purchasing for Private Label Instant Oatmeal. This drove the negative impact in sales for the item.

Private Label Instant Oatmeal



Quaker Instant Oatmeal



Point Difference: -0.1

Percent Difference: (7%)

Significance level: 93%***

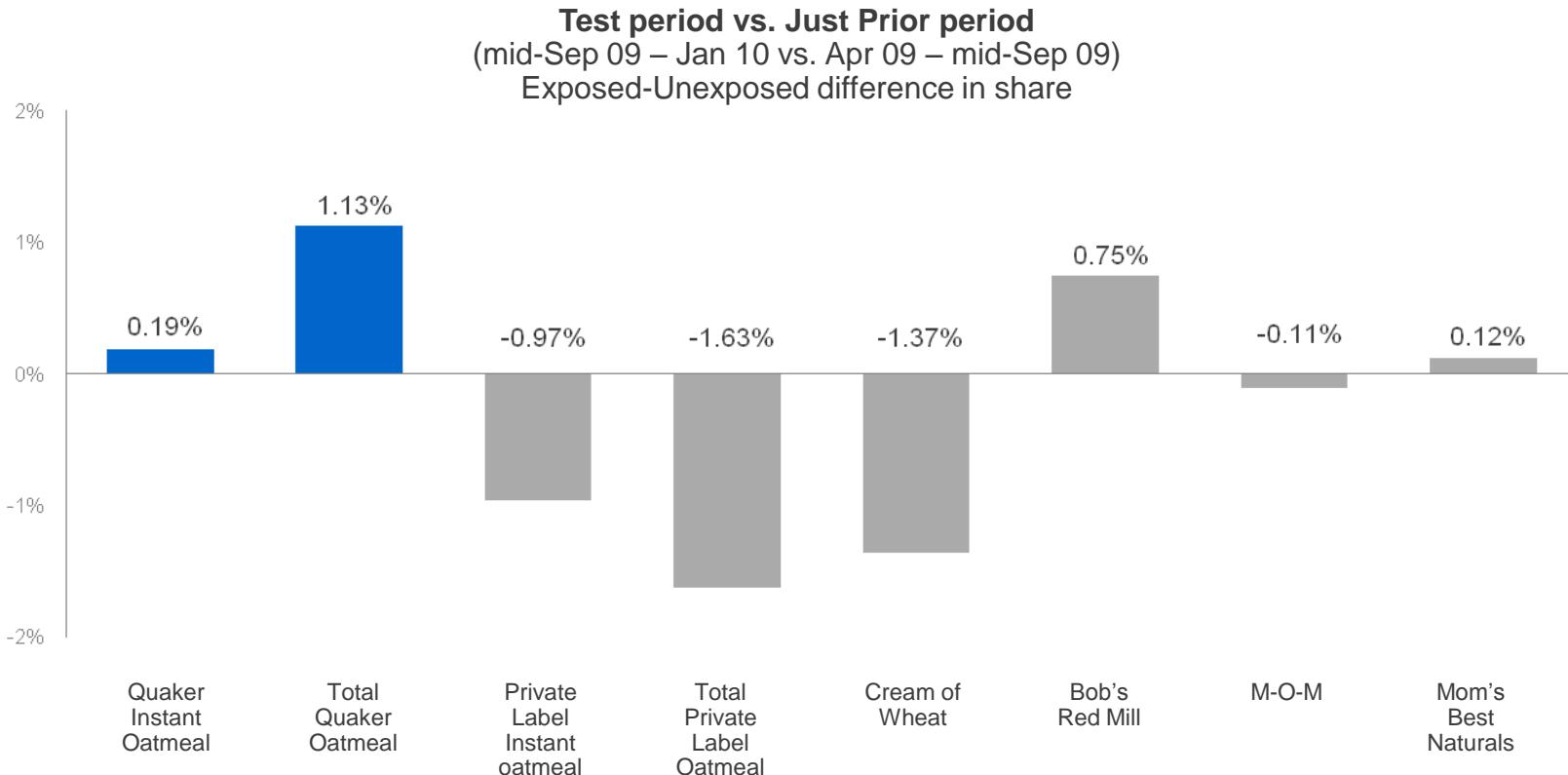
+0.1

+1%

18%

Difference in Percent Change within Total Hot Cereal Unit Shares

Exposed households were making Quaker Instant Oatmeal a larger part of their total hot cereal purchase mix while reducing the share given to Private Label and Cream of Wheat.



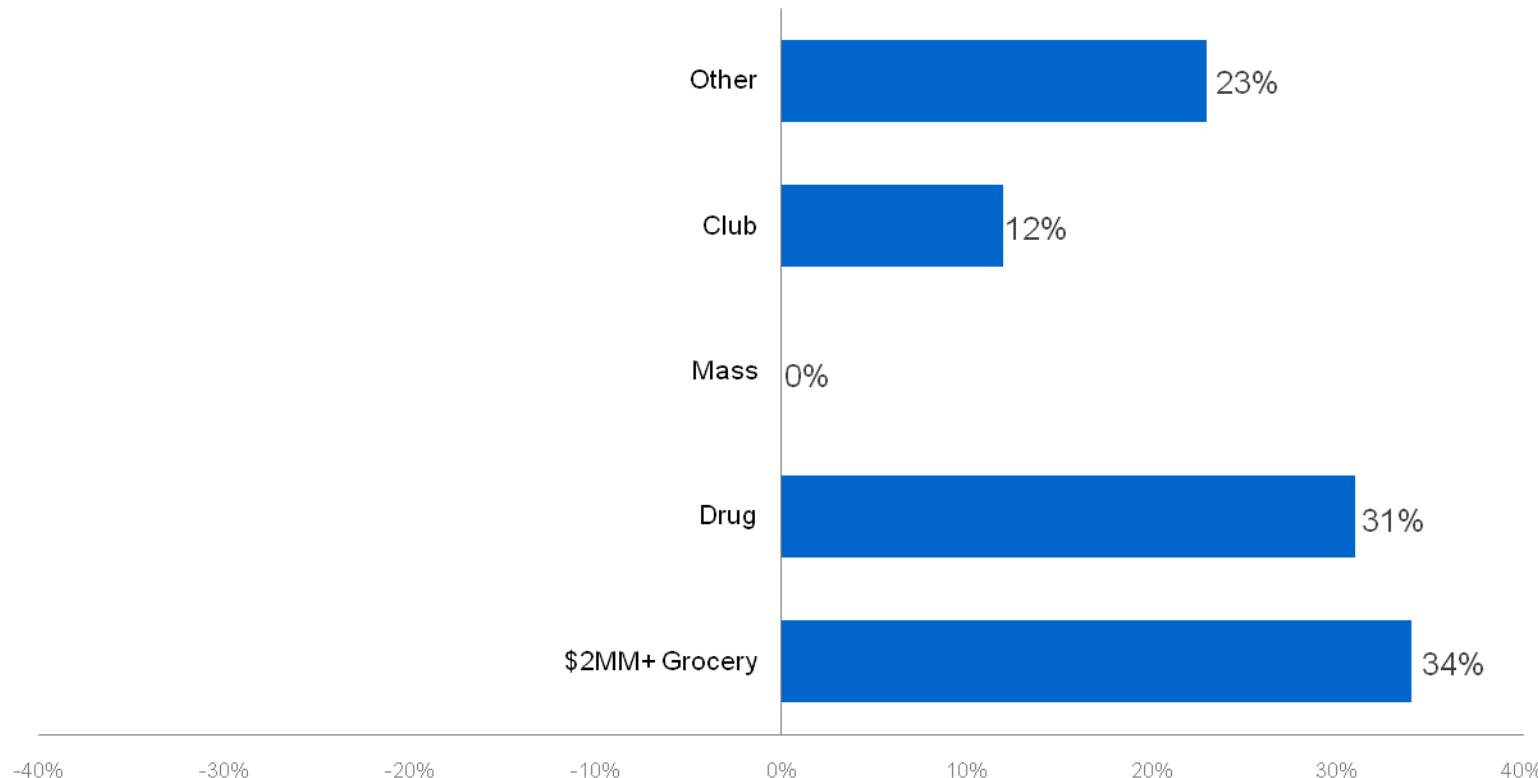
Source: Quaker Instant Oatmeal Display Case Study,
Nielsen Offline Sales Impact Analysis, March 2010

Contribution to ROI by Channel – Quaker Instant Oatmeal

(Grocery, Drug, Mass, Club, and Other)

For Quaker, the ROI was impacted by all channels, particularly grocery & drug.

Contribution by Channel to ROI

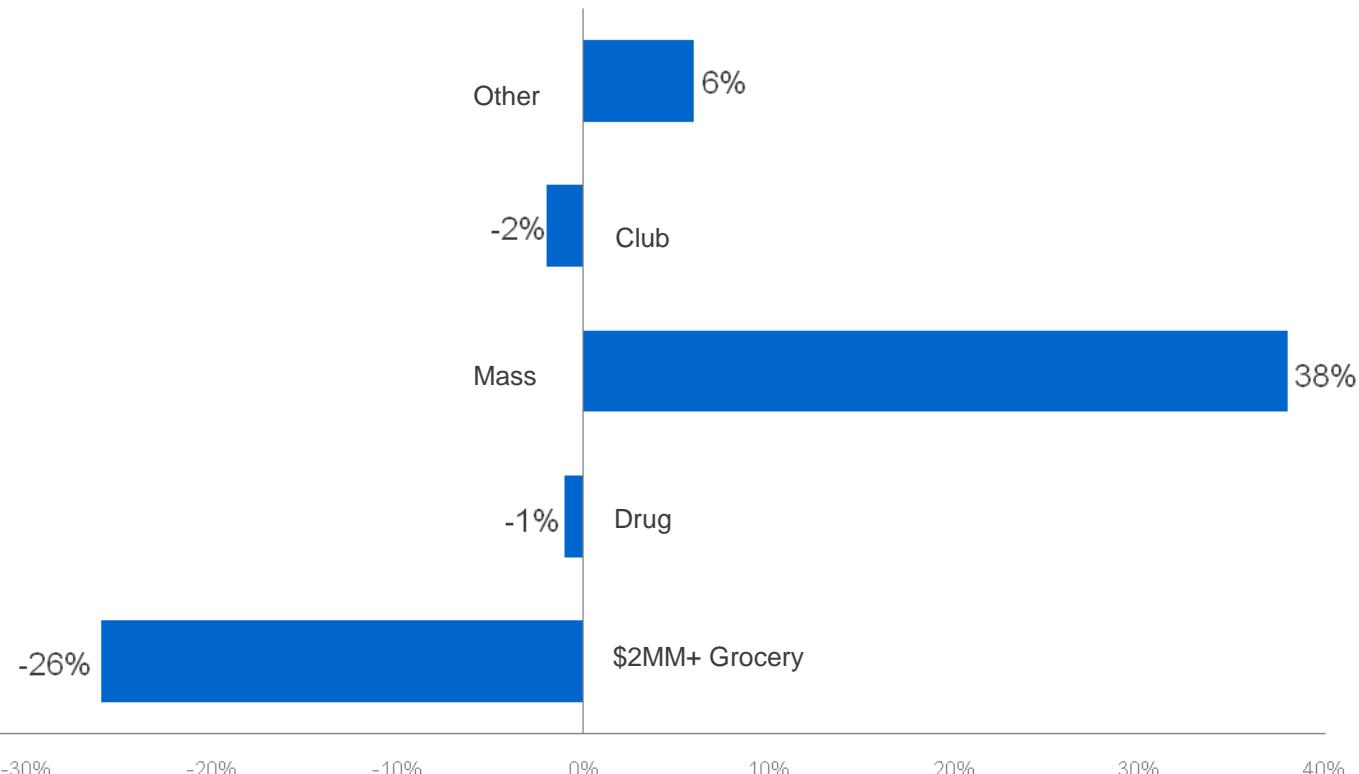


Source: Quaker Instant Oatmeal Display Case Study, Nielsen
Offline Sales Impact Analysis , March 2010

Contribution to ROI by Channel – Private Label Instant Oatmeal (Grocery, Drug, Mass, Club, and Other)

The biggest decreases to the Private label unit ROI were Grocery and Club,

Contribution by Channel to ROI



Source: Quaker Instant Oatmeal Display Case Study,
Nielsen Offline Sales Impact Analysis, March 2010

Program Result Summary

Households exposed to the advertising significantly bought +9% more units of Quaker Instant Oatmeal than households that were not exposed.

Sales lift was driven by more buyers purchasing greater amounts.

1

Households exposed to the advertising bought -8% less units Private Label Instant Oatmeal than households that were not exposed.

Sales reduction was driven by buyers purchasing less often.

2

The campaign was effective at increasing Quaker Oatmeal's share of the Hot Cereal category by +1.13%.

The share increase came at the expense of Private Label Oatmeal & Cream of Wheat. The campaign was particularly effective at getting grocery outlet to switch from Private Label to Quaker.

3

Source: Quaker Instant Oatmeal Display Case Study, Nielsen Offline Sales Impact Analysis , March 2010

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