

COLD, SINUS & ALLERGY (CSA)

TARGETING YOUR PROMOTION SPEND WITH INTEGRATED MEDIA

April 2013 had the Highest Estimated Expenditures in CSA

Across all media measured by Kantar Media, Marx, April was the highest month in 2013 at \$46.4 MM in Estimated Expenditures (spend), combining media that drove shopper's path to purchase. Including: Print FSI (Free Standing Inserts) coupons, Digital coupons and Retailer Advertising for the CSA category.

Print FSI captured the largest share at 71.5% of April 2013 spend, followed by 22.1% for Retailer Advertising spend, and finally 6.4% for Digital coupon spend.

Spend by Month	Apr 13				May 13	Jun 13	Jul 13	Aug 13	Sep 13	Oct 13	Nov 13	Dec 13
	Jan 13	Feb 13	Mar 13	Apr 13								
Print FSI (Free Standing Inserts)	\$ 18,756,300	\$ 19,444,500	\$ 26,228,800	\$ 33,191,900	\$ 13,160,400	\$ 7,049,000	\$ 600,700	\$ 23,240,900	\$ 26,823,400	\$ 17,374,400	\$ 13,846,500	\$ 12,568,700
Digital Coupons	\$ 675,300	\$ 313,600	\$ 64,400	\$ 2,953,400	\$ 108,200	\$ 109,400	\$ 209,300	\$ 1,755,800	\$ 108,300	\$ 490,700	\$ 613,800	\$ -
Retailer Integrated Media (DHRI)	\$ 7,370,100	\$ 3,332,508	\$ 3,462,757	\$ 10,283,444	\$ 1,256,681	\$ 1,799,886	\$ 416,071	\$ 1,715,406	\$ 6,085,833	\$ 8,065,984	\$ 2,203,744	\$ 3,513,622
Total	\$ 26,801,700	\$ 23,090,608	\$ 29,755,957	\$ 46,428,744	\$ 14,525,281	\$ 8,958,286	\$ 226,071	\$ 26,712,106	\$ 33,017,533	\$ 25,931,084	\$ 16,664,044	\$ 16,082,322

Retailer Leaders in CSA Spend April 2013

Walgreens was the retailer that provided the most support for the CSA category during its highest month of April 2013. Walgreens had a 44% Share of Voice (SOV) within this category while Walmart was a close second with a 40% SOV.

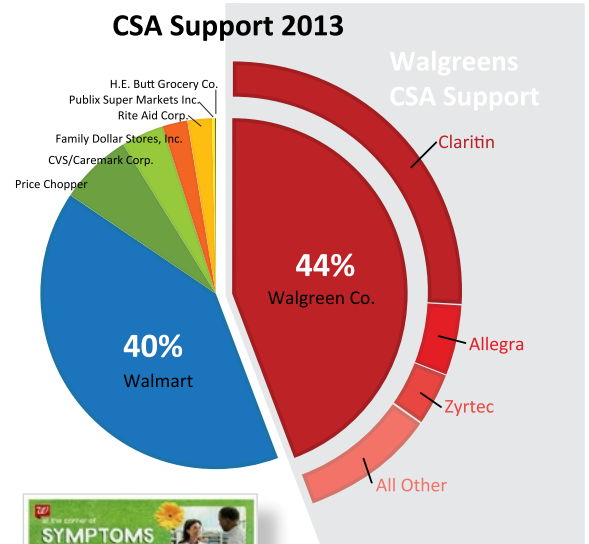
Walgreens top three Brands in the Allergy category:

Claritin maintained a presence in front of the shopper for all four weeks in April 2013 with the use of **digital events**. However, the majority support at Walgreens came from a **national TV campaign** on ABC. While this network TV event garnered a large amount of support with Walgreens, it would be interesting to see how that tactic worked in comparison to Allegra and Zyrtec; neither of which had network TV support.

Allegra had activity at Walgreens only during the week ending 4/14/2013. This activity consisted of a **retailer-specific FSI** event supported with a **digital event** and a small **radio campaign**. While Allegra did receive more support than Zyrtec at Walgreens, Allegra did not remain active for as many weeks as Zyrtec.

Zyrtec ran a **retailer-specific FSI** event with Walgreens for the week ending 4/14/2013. This event was supported both before and after its drop date with **digital events** during each week in April. While Zyrtec was the brand that received the least amount of support amongst the big three allergy brands, Zyrtec was the only brand that connected with shoppers for each week in April 2013."

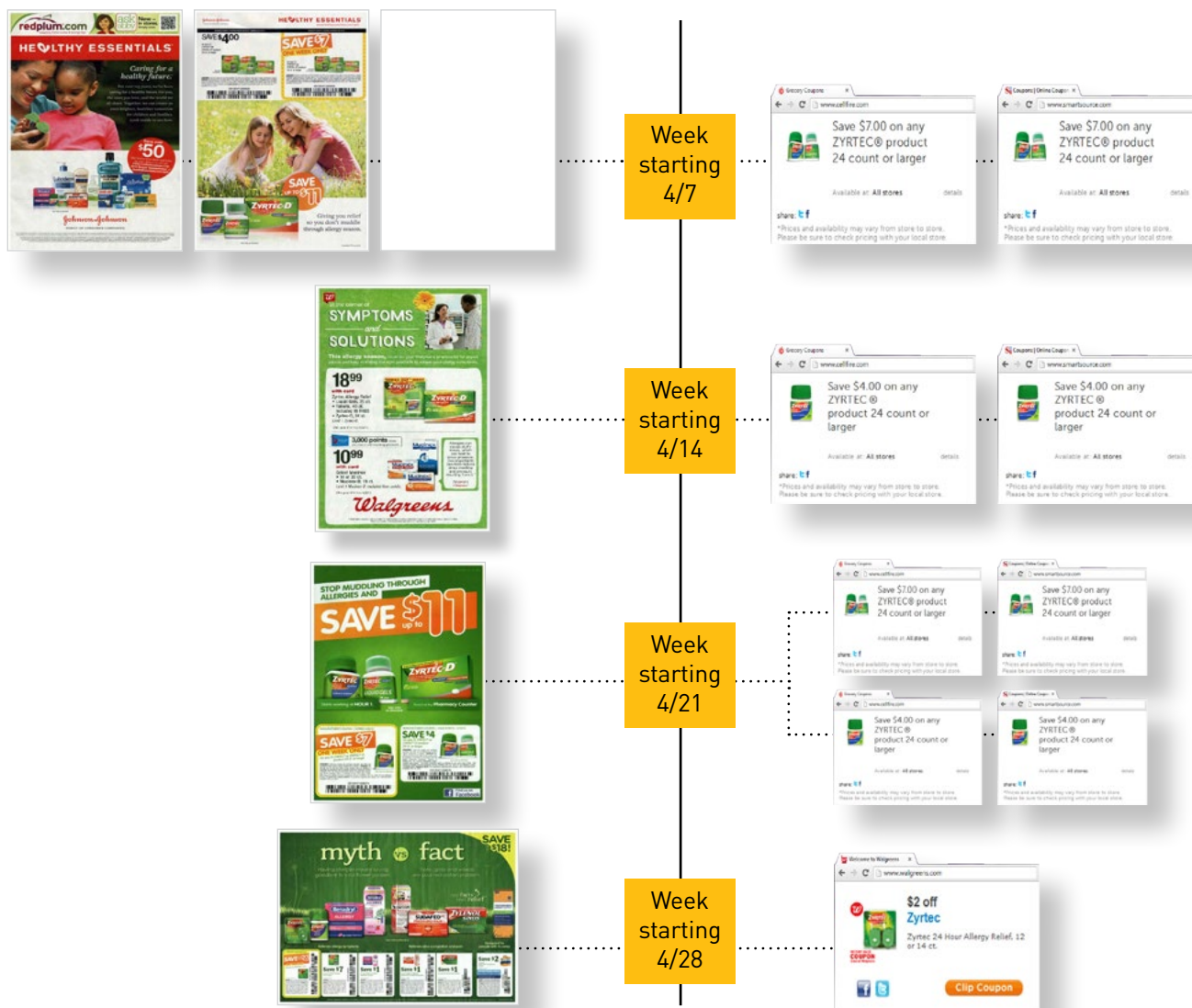
While all three brands received support at Walgreens in April 2013, each brand used a slightly different tactic to both engage with the retailer and reach the consumer.



Zyrtec Promotion Support Time line

WIN THE WEEK: Align your brand marketing and retail promotion activity to capture your share of voice in your category for your brands.

APRIL 2013



Methodology:

Please note the differences in Estimated Expenditure (spend) calculations by media:

- FSI Coupon spend includes placement, redemption and handling estimations
- Digital Coupon spend includes placement, redemption and handling estimations
- DirectHEAT Retailer Media spend includes placement estimations

Get more from Marx – we provide key spending metrics to help you measure and respond to competitive threats in your categories, from FSI coupons, to digital coupons and retailer advertising. Let us help you quantify your next campaign and keep you ahead of the competition with our first to market data and insights.

Contact Marx today to learn more:

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