



Live Active and Philly

Unique appeal and overlap

29th November 2011



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Key highlights



Do buyers duplicate across Kraft Live Active & Philadelphia Cream Cheese?

- For LiveActive 160g Mini Tubs and Philly 160g Tubs, with just 5.9% of total buyers duplicating
 - This equates to 14.8% of Live Active 160g buyers duplicating with Philly 160g

Who buys Live Active exclusively? Who buys in conjunction with Philly?

- Independent Singles make up one third of Live Active's **solus buyers**
- 55+ make up over half of Live Active's **solus buyers**
- Low and Medium Income HHs are particularly important amongst Live Active **solus buyers**
- 1-2 Member Households make up 71.9% of **solus buyers**
- **Duplicating buyers** have a slightly more balanced profile, also bringing into Live Active - Senior Couples and Families, High Income HHs, Large HHs, and younger Primary Shopper Age groups

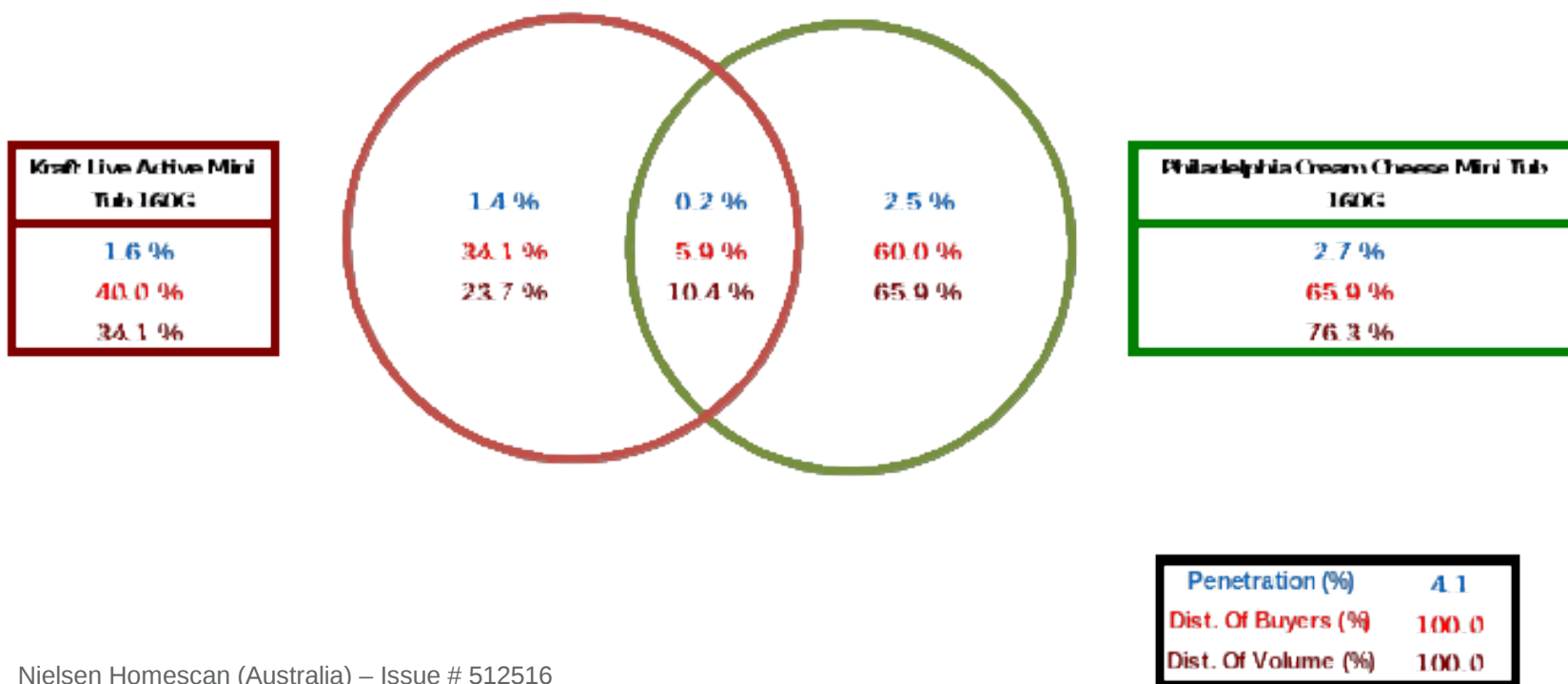
Do buyers duplicate across Kraft Live Active Mini Tub 160g & Philadelphia Cream 160G Mini Tub range Cheese?

Compared to the total range, Live Active Mini Tubs has a much higher proportion of solus buyers (85.3%) vs buyers duplicating with Philly 160g Tubs (14.8%).

MAT To 29/10/2011

% Penetration | Based on AUS

(% Buyer & Volume Contribution of Total Brands - Kraft Live Active Mini Tub 160G & Philadelphia Cream Cheese Mini Tub 160G)



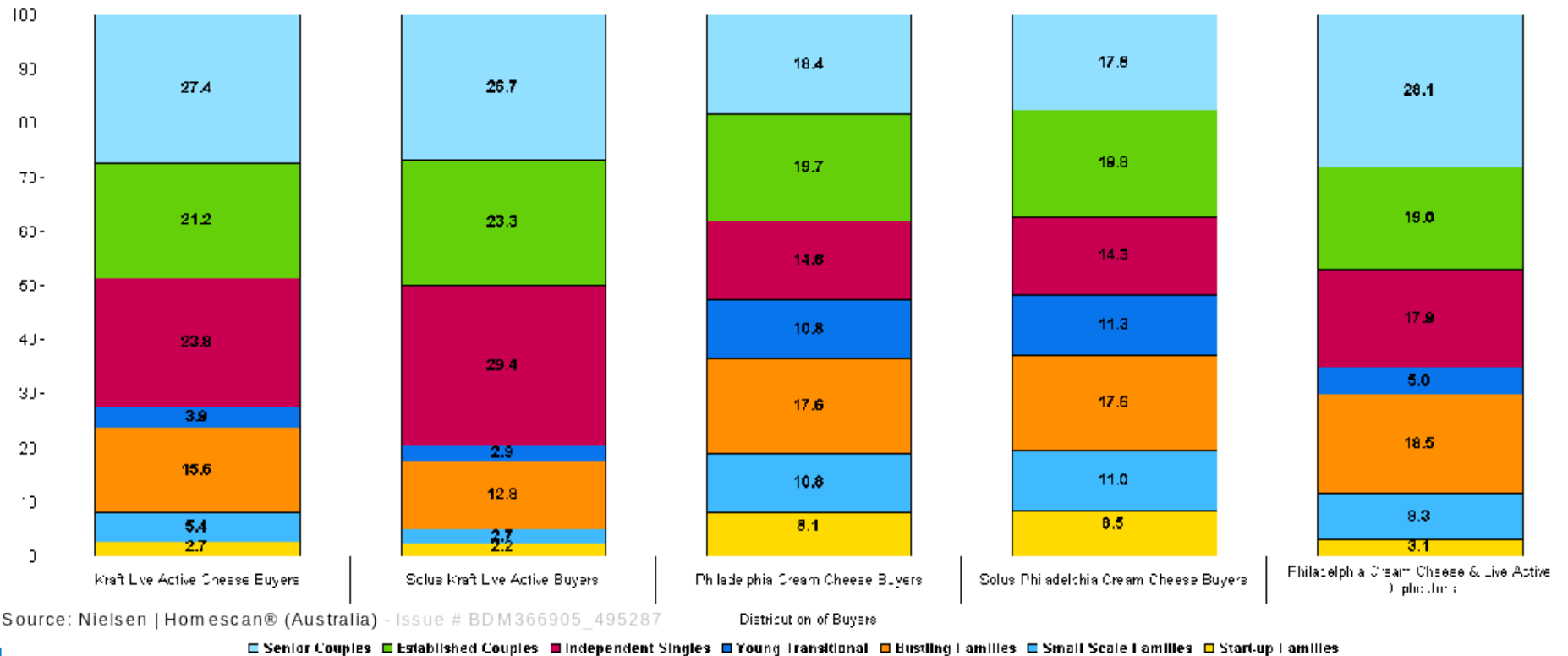
Nielsen Homescan (Australia) – Issue # 512516

Who buys Live Active exclusively, and who buys in conjunction with Philly? Senior Couples and Independent Singles are Live Active's most important life stage groups in terms of buyers and volume contribution (see next slide). Independent Singles make up 1/3 of the range's solus buyers. The most notable duplicating buyers are Senior Couples.

Demographic Distribution | Based on Buyers | By Lifestages

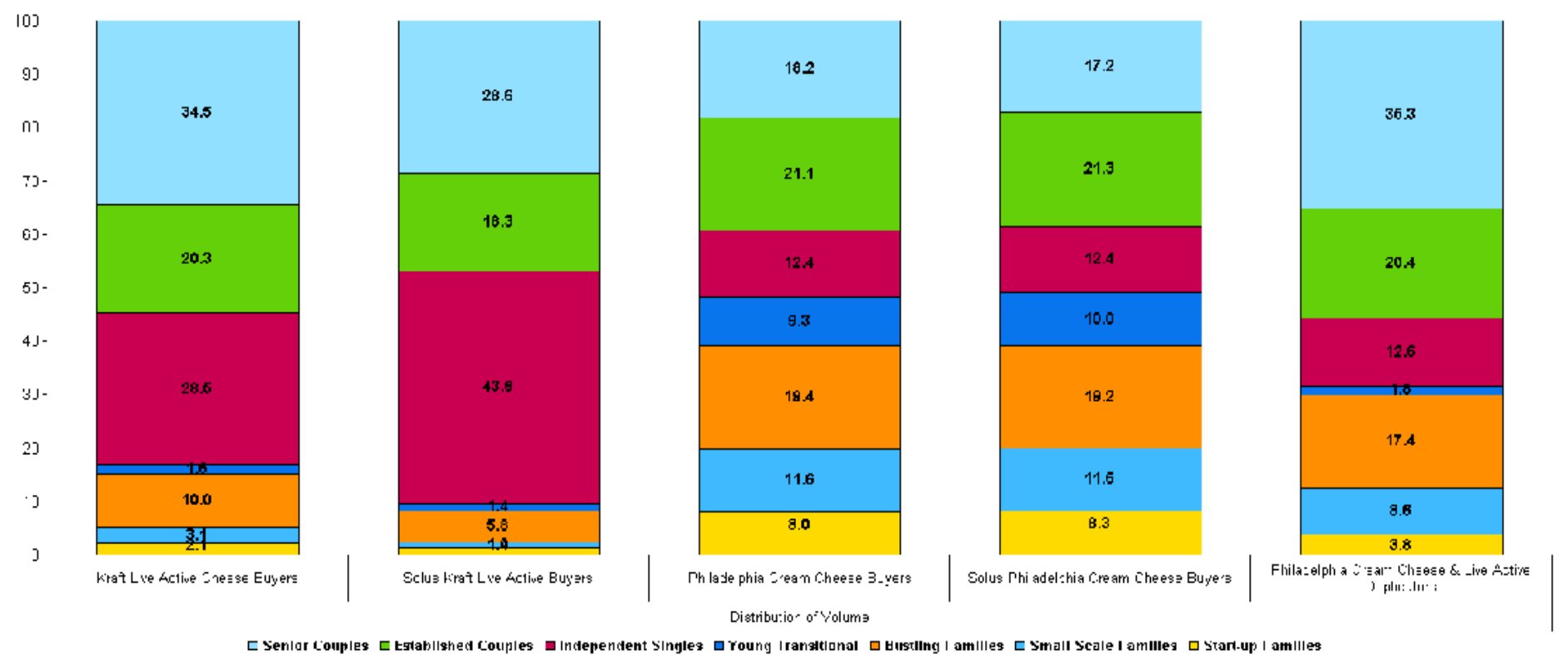
AUS - MAT To 29/10/2011

Philly has a more balanced demographic make up, highlighting it's broad appeal



Demographic Distribution | Based on Volume | By Lifestages

AUS - MAT To 29/10/2011

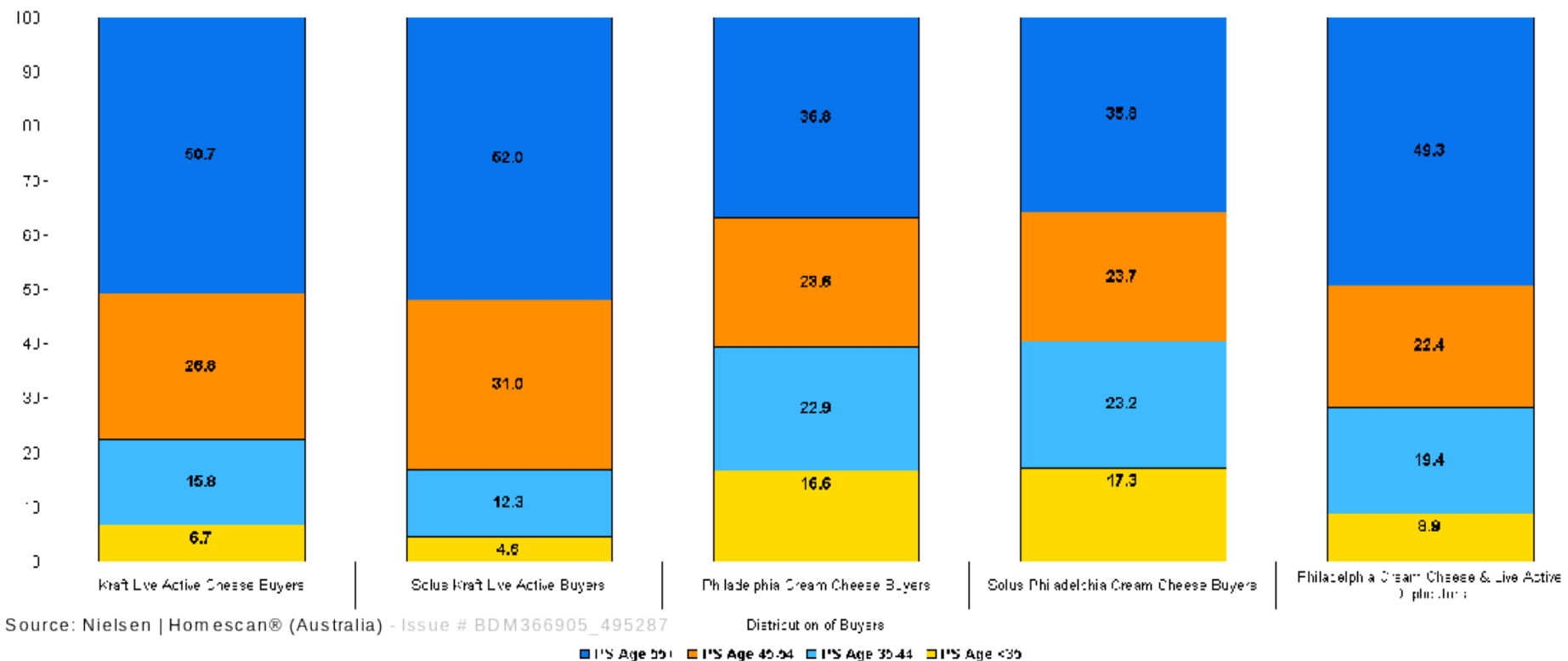


Source: Nielsen | Homescan® (Australia) - Issue # BDM366905_495287

Who buys Live Active exclusively, and who buys in conjunction with Philly? 55+ is Live Active's most important Primary Shopper Age group in terms of buyers and volume contribution (see next slide). This same group makes up over ½ the range's solus buyers. The younger buyer groups are more prominent amongst duplicating buyers.

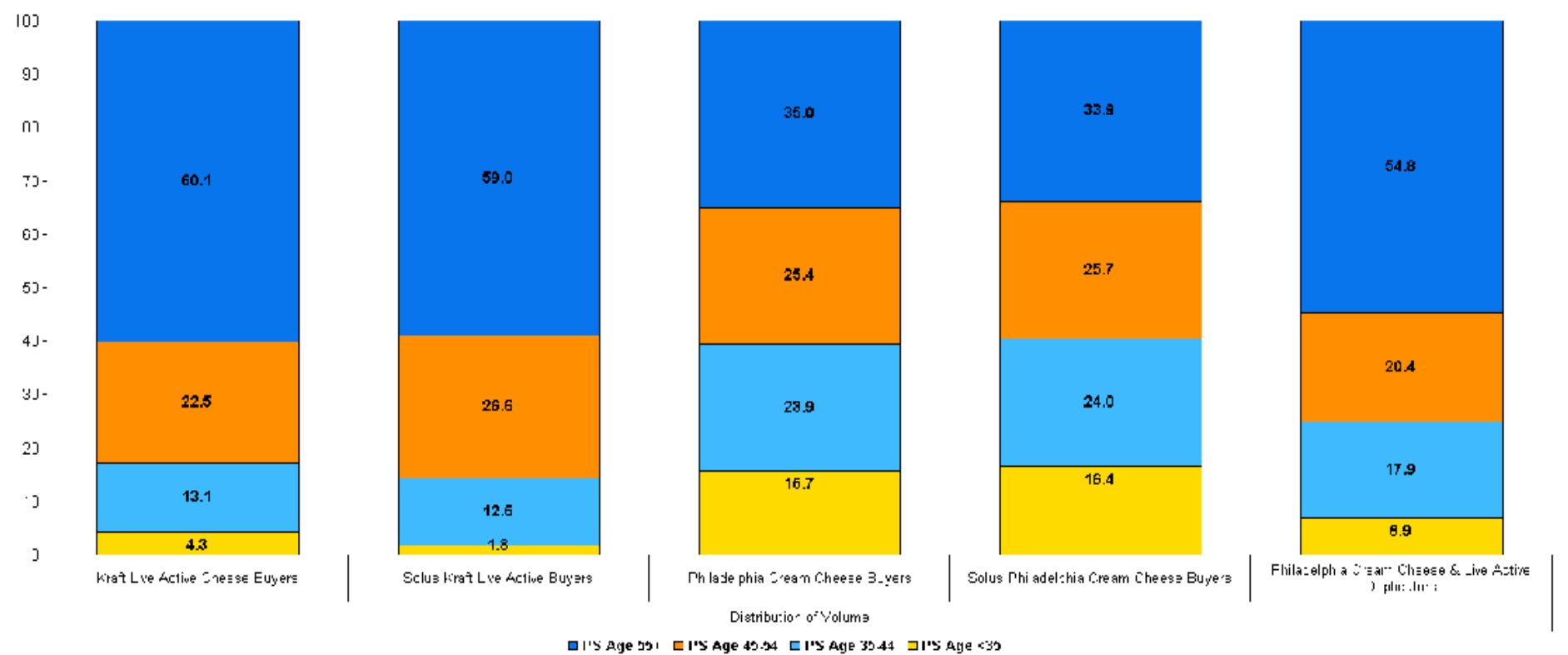
Demographic Distribution | Based on Buyers | By PS Age

AUS - MAT To 29/10/2011



Demographic Distribution | Based on Volume | By PS Age

AUS - MAT To 29/10/2011

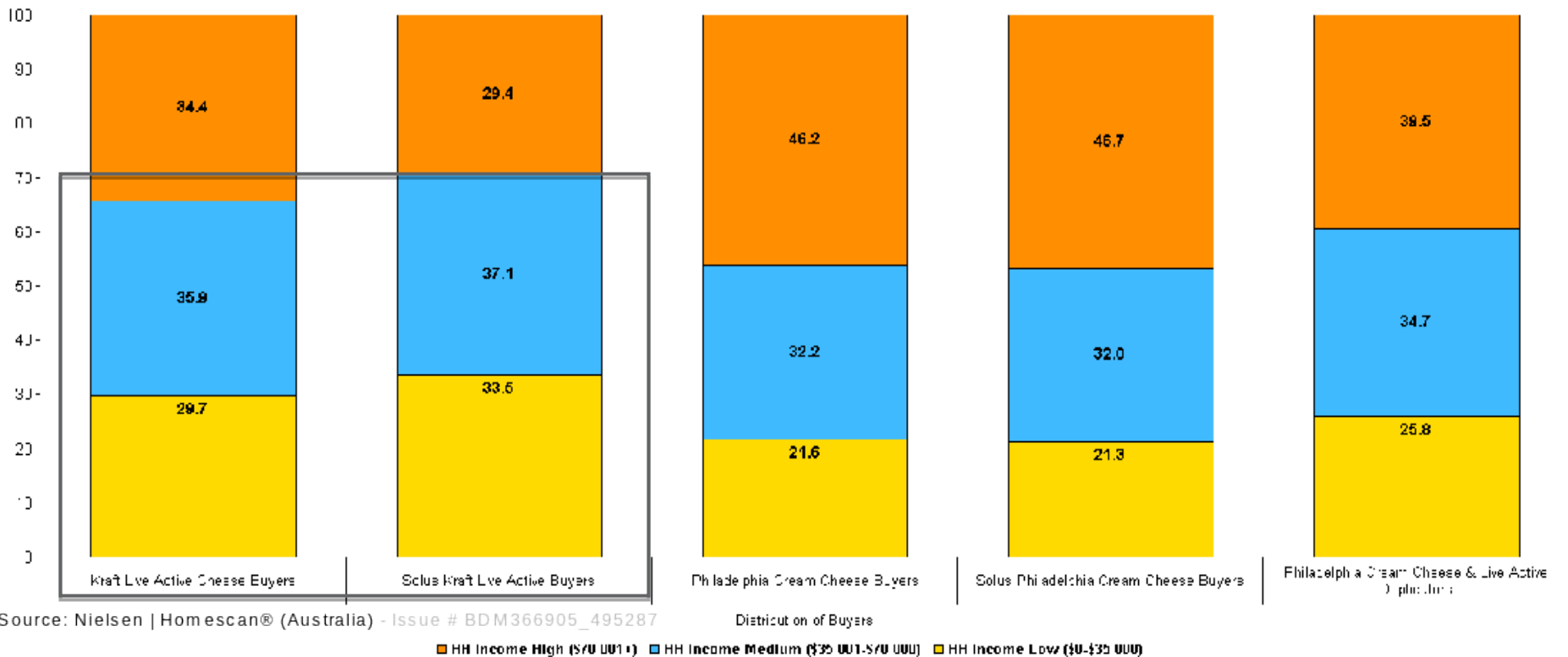


Source: Nielsen | Homescan® (Australia) - Issue # BDM366905_495287

Who buys Live Active exclusively, and who buys in conjunction with Philly? *The Low and Medium Income groups are more important to Live Active than to Philly; this is particularly the case amongst the solus buyers. High Income buyers become more representative amongst duplicating buyers.*

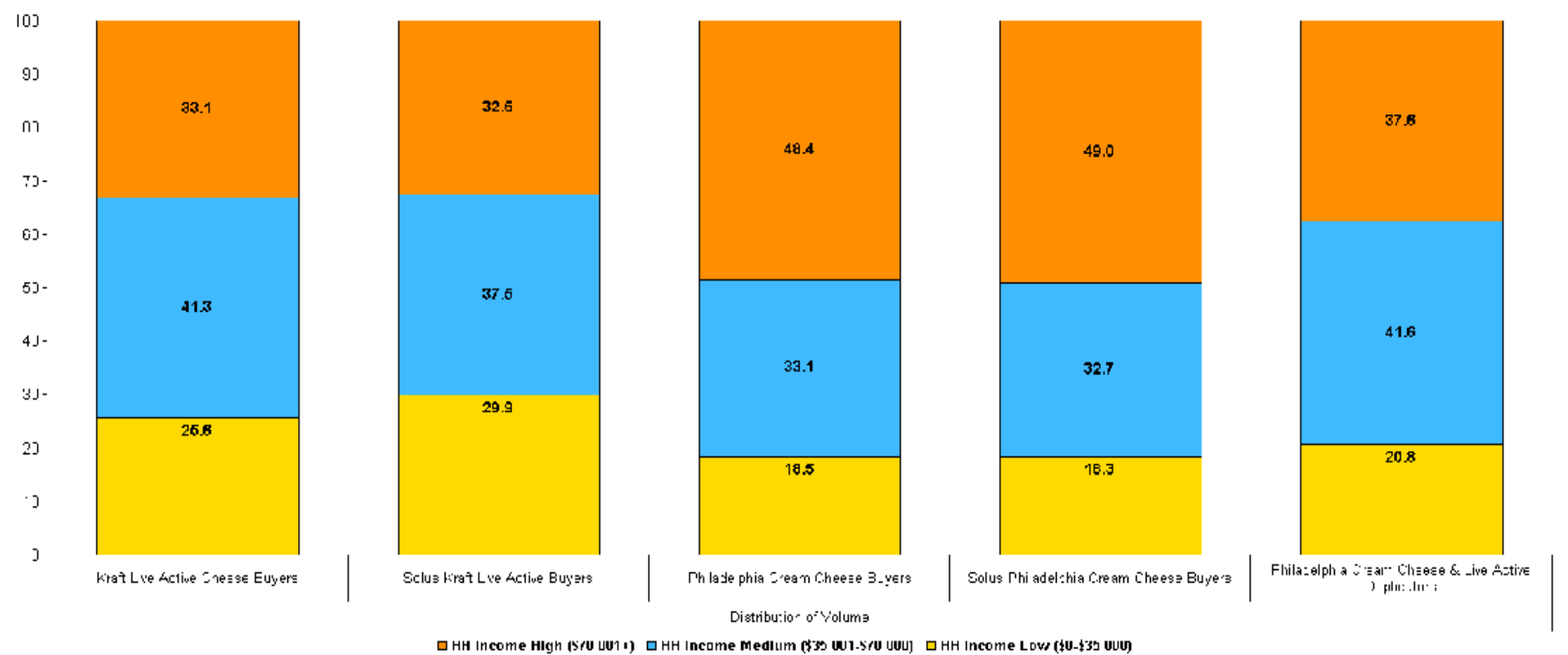
Demographic Distribution | Based on Buyers | By HH's Income

AUS - MAT To 29/10/2011



Demographic Distribution | Based on Volume | By HH's Income

AUS - MAT To 29/10/2011

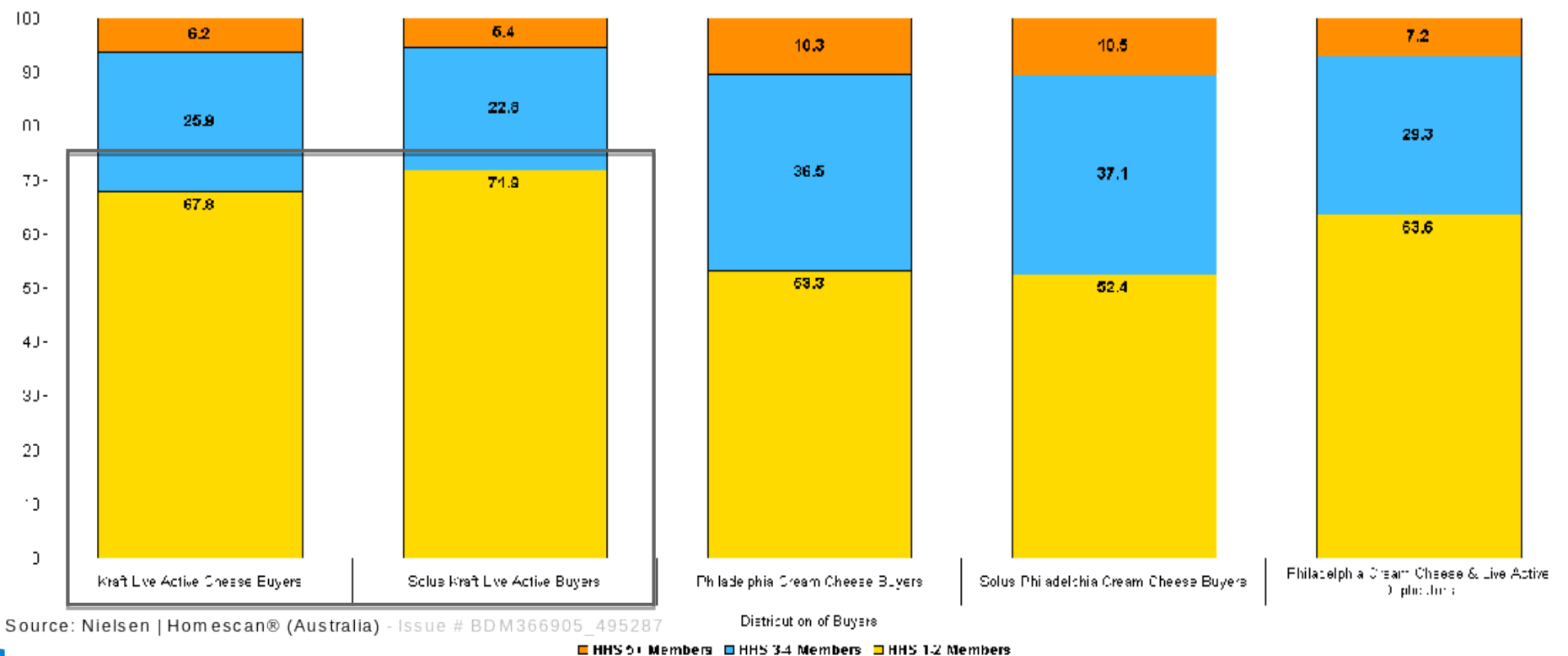


Source: Nielsen | Homescan® (Australia) - Issue # BDM366905_495287

Who buys Live Active exclusively, and who buys in conjunction with Philly? 1-2 Member Households make up 67.8% of Live Active buyers, and 71.9% of solus buyers. The larger households become more important amongst the duplicating buyers.

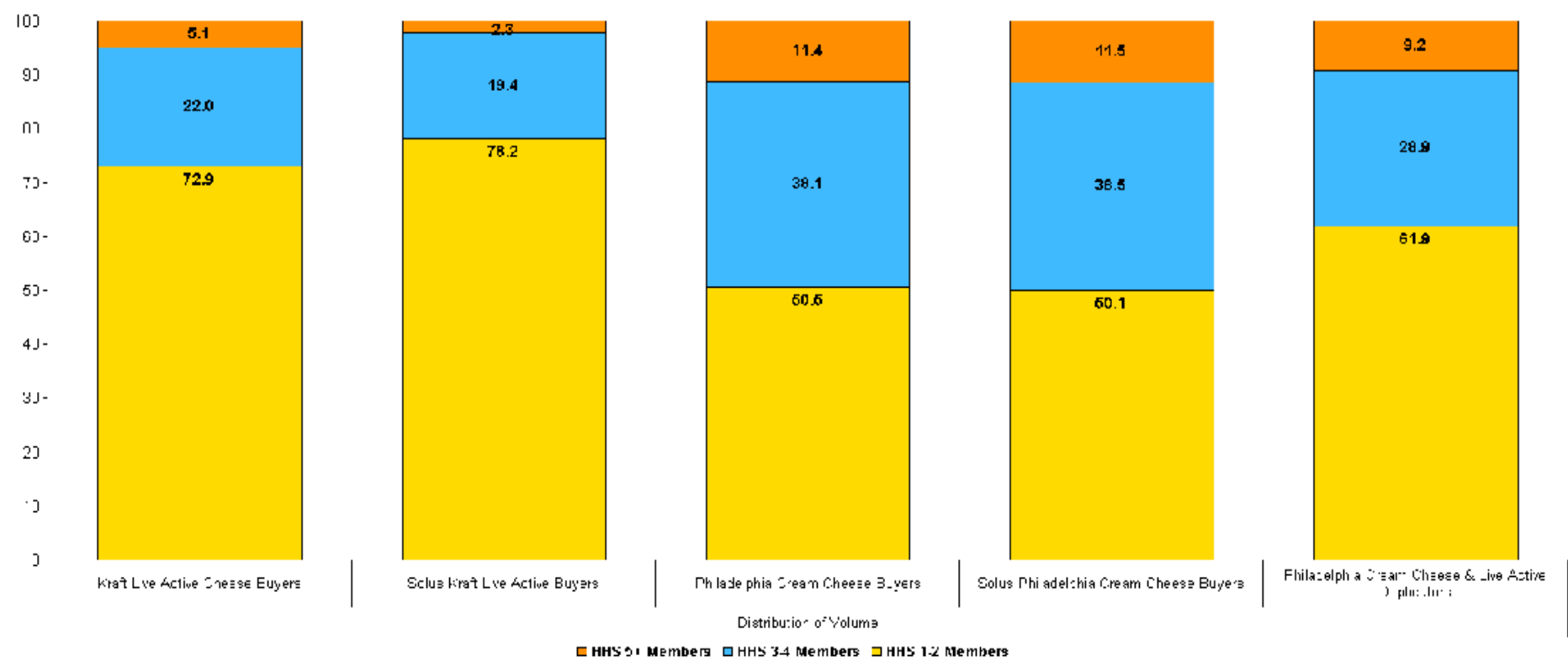
Demographic Distribution | Based on Buyers | By HH's Size
 AUS - MAT To 29/10/2011

Philly has a larger proportion of 3-4 and 5+ Member households



Demographic Distribution | Based on Volume | By HH's Size

AUS - MAT To 29/10/2011



Source: Nielsen | Homescan® (Australia) - Issue # BDM366905_495287

Thank you

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