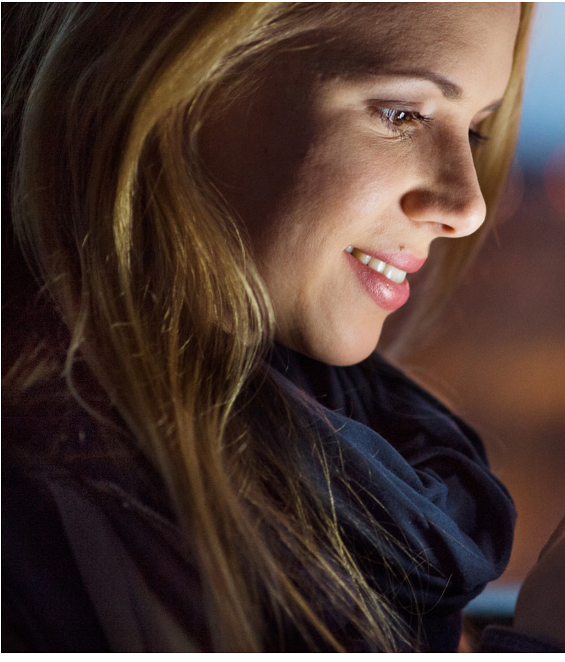

Always ON

How has modern life changed SHOPPERS & THEIR SAVINGS QUEST?

With the assistance of devices and food selection options — seems deal-seekers can't stop, won't stop. See highlights from the 2K18 Valassis *Coupon Intelligence* Report below – to inspire greater activation.

COUPON TRENDS

Higher coupon use & frequency

2018
94%
OF CONSUMERS USE COUPONS "EVER"

vs. 90% in 2017 and 2016

Increase in millennials who "always or very often" use coupons

2018	50%
2016	41%

Paperless coupon use

(discounts via smartphones, mobile devices, loyalty cards)

2017	2018
71%	75%

up 4% points YOY

Parents	92%
Millennials	88%

Paper coupon use

(via mail, store, printed from computer, or newspaper coupon book)

2017	2018
88%	93%

up 5% points YOY

% of consumers who use coupons "ever"

APPS ON THE RISE

MOBILE SAVINGS APPS

	2016	2017	2018
Grocery/drug/mass store and/or supercenter savings app	38%	51%	56%
Cash back/points app	30%	41%	46%
Coupon app	31%	44%	45%
In-store shopping rewards app	29%	39%	43%
Shopping list app	25%	34%	36%
Deal comparison app	25%	32%	34%

% of consumers who use these apps "ever"

WHO SHOPS WHERE?

When shopping for food products, household goods and health & beauty care products

"I do all or most of my shopping for this category in a store"

IN-STORE SHOPPERS

- More likely promotion sensitive
- Skews female (for food & HH goods)
- HH income $50K+
- Skews baby boomers

"I do all or most of my shopping for this category online"

ONLINE SHOPPERS

- Motivated by convenience
- Higher coupon usage
- Skews male (for food & HH goods)
- More likely to have children in HH
- HH income $75K+
- Skews millennials & gen Xers

"I do about half of my shopping for this category online and the other half in a store"

OMNI-CHANNEL SHOPPERS

- Behaviors similar to online shopper
- Skews parents (for HBC products)
- HH income $50K+
- Skews millennials & gen Xers

In-store & online shopper includes food, HH goods and HBC category purchases | omni-channel shopper includes HH goods and HBC category purchases

CHANGES IN LIST-MAKING (IN ADDITION TO HANDWRITTEN)

	Parents	Millennials	Millennial parents	All consumers
Using a website	71%	73%	80%	51%
Using a shopping list app	61%	61%	74%	36%

% of consumers doing these activities "ever"

PLAN & SHOP AS NEEDED

1/3 of consumers have no preferred day for planning or shopping for food

47% shop for food throughout the week (Mon–Fri)

do fill-in trips several times a week:

Parents	Millennials	Millennial parents	All consumers
34%	27%	38%	22%

TURNING TO NEW OPTIONS

ONCE A WEEK

ORDER...	ALL CONSUMERS	PARENTS	MILLENNIALS	MILLENNIAL PARENTS
Groceries online from website	7%	14%	12%	15%
Groceries online from a local grocer and **pick up** at the store	8%	17%	14%	20%
Groceries online from a local grocer and **delivered** to my home	6%	10%	11%	13%
A meal kit online delivered to my home	5%	10%	10%	14%

BESIDES SAVINGS, WHAT ATTRACTS MODERN SHOPPERS?

	Parents	Millennials	Millennial parents	All consumers
local, neighborhood stores	63%	52%	59%	55%
stores with unique experience	56%	55%	66%	36%
organic and natural products	48%	50%	60%	33%

% of consumers who strongly or somewhat agree

Source: 2K18 Valassis *Coupon Intelligence* Report "Modern Shoppers and Their Quest for Savings."
Research focused on behavior for traditional CPG categories. Base: All respondents

Valassis
intelligent media delivery