

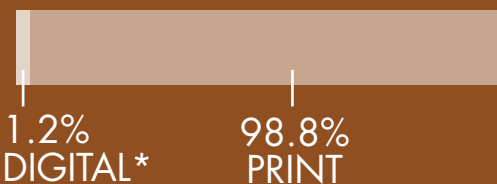
NCH MID-YEAR 2017 COUPON FACTS: AT A GLANCE

TOTAL CONSUMER PACKAGED GOODS COUPONS [PRINT & DIGITAL]

163 BILLION
Coupons Distributed

-3.1% FOOD **+1.3%** NON-FOOD

Share of Distribution:



DISCOUNTS ARE ON THE RISE

Coupons Distributed:

\$2.00
Average Face Value +10.5%

\$1.17
FOOD +1.7%

\$2.34
NON-FOOD +12.5%

Coupons Redeemed:

\$1.53
Average Face Value +7.0%

\$1.18
FOOD +8.9%

\$1.88
NON-FOOD +6.1%

{Higher values driven primarily by Personal Care & Hygiene and OTC products}

COUPONS REQUIRE MORE IN LESS TIME

23% OF ALL COUPONS
Have Multiple Item Purchase Requirements

40%
FOOD

16%
NON-FOOD

7 WEEKS

Average Offer Duration -1.4%

9.7 WEEKS
FOOD -1.0%

5.9 WEEKS
NON-FOOD -1.7%

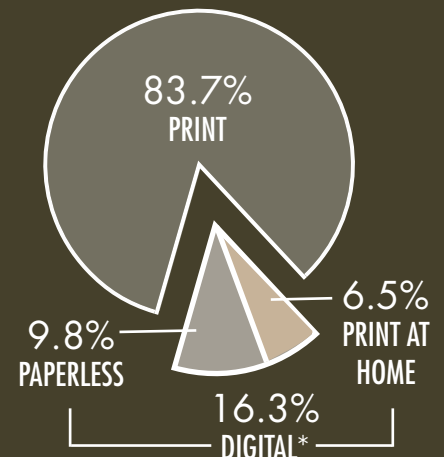
EIGHT OUT OF TEN COUPONS ARE REDEEMED FROM TRADITIONAL PRINT MEDIA

1.080 BILLION
COUPONS REDEEMED

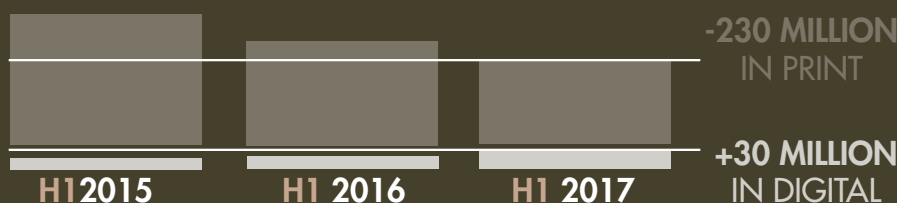
-7.7%
FOOD

-9.2%
NON-FOOD

SHARE OF REDEMPTION:



Marketer Choices and Retailer Influences Cause Redemption Activation Imbalance



*Digital includes Print At Home, Paperless and Blended digital media coupons.

Source: NCH U.S. CPG Coupon Facts: Mid-Year 2017 [YOY Percent Change vs. Mid-Year 2016]

Projections based upon NCH measurements and proprietary modeling of market activity.

For more information contact 847.317.5500 or visit www.nchmarketing.com

© 2017 NCH Marketing Services, Inc. All Rights Reserved.