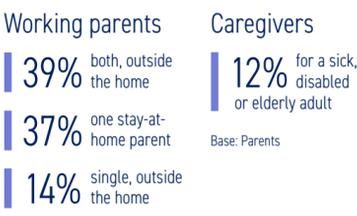


EMPOWERED SHOPPERS, EVOLVING EXPECTATIONS

Managing life's demands and ensuring there are groceries in the house is getting easier. Shopper-friendly technology and coupon accessibility – across print and digital – to the rescue. But marketers have more work to do, according to consumers' desires.

BALANCING PRIORITIES AT WORK & HOME



SHOPPING AT ALL HOURS



66 I plan my shopping and make purchases at various times throughout the day to fit into my busy schedule 99

LISTS? CHECK - THE USUAL & NEWER APPROACHES

64% Maintain an ongoing list

Handwritten notes are part of life, but today so is using:



*Always or very often

Even so, consumers say they need better solutions to >>



ONLINE GROCERY SHOPPING

Prepare for growth as busy consumers buy food, household goods, and HBC items online

WHO IS THE ONLINE GROCERY SHOPPER?

77% of online grocery shoppers are between the ages of 18 & 44

- Skews **millennials and gen Xers**
- Majority are **male**
- **22%** are **Hispanic**
- Likely to have **children** in HH
- **\$80,900** avg. HH income

MORE & MORE WAYS TO GET GROCERIES ORDERED ONLINE

Pick up from local grocers

Home delivery from websites (such as AmazonFresh)

Home delivery from local grocers (via service like Shipt)

APPEAL OF ONLINE GROCERY SHOPPING



HEAVIER COUPON USERS



Loads coupons onto a loyalty/frequent shopper card



HIGHER ENGAGEMENT WITH STORE CIRCULAR TO DECIDE WHERE TO SHOP



EMPOWERED SHOPPERS WANT SEAMLESS, EASIER SAVINGS

ABOUT **25%** OF CONSUMERS

Don't shop online because can't use coupons or get in-store deals

FREE BOGO NEW



GROWING PREFERENCE FOR COUPONS FROM ALL SOURCES: PRINT & DIGITAL

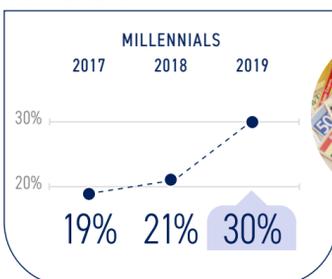


RESILIENT COUPONS. RELEVANT TO MILLENNIALS.

OVERALL COUPON USE & FREQUENCY



The majority of consumers continue to use coupons



Note: Rise in millennials who **always** use coupons