

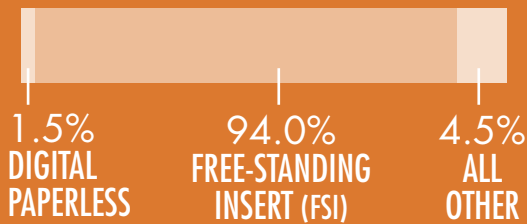
NCH YEAR-END 2018 COUPON FACTS: AT A GLANCE

CPG Budget Shifts Impacted Direct-to-Consumer Coupon Metrics

TOTAL CONSUMER PACKAGED GOODS COUPONS [PRINT & DIGITAL*]

256.5 BILLION
Coupons Distributed ↓

Share of Coupons Distributed:



TOP RETAILER REDEMPTION RESULTS

CPG COUPON AVAILABILITY CREATED DIFFERENCES IN YEAR-OVER-YEAR SHARE OF ACTIVATION

2018	2017	Retailer	YOY Share Point Difference**
1	1	KROGER	1.0
2	2	WALMART	-2.2
3	4	AHOLD DELHAIZE	0.4
4	8	CVS	1.4
5	3	TARGET	-0.8

The Top Five Retailers Ranked by Redemption Volume Represent Nearly 50% of All CPG Coupons Redeemed in 2018

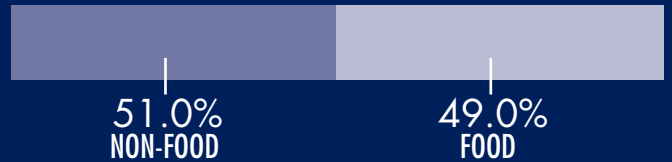
**Share of Top Ten Retailers.

SHARE BY INDUSTRY SEGMENT

COUPONS DISTRIBUTED



COUPONS REDEEMED



TOTAL CPG COUPON REDEMPTION [PRINT & DIGITAL*]

1.715 BILLION
COUPONS REDEEMED ↓

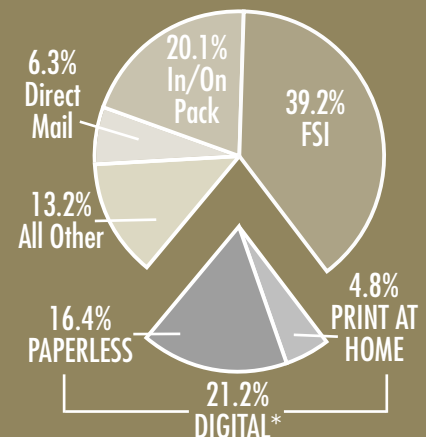
\$2.7 BILLION
FACE VALUE REDEEMED ↓

HIGHEST AVERAGE REDEMPTION RATES BY COUPON:

2018	2017	Coupon Media	2018 Average Redemption Rate***
1	1	IN/ON PACK	15.25%
2	3	DIRECT MAIL	7.93%
3	2	DIGITAL*	6.92%

The Top Three Media Ranked by Average Response Represent Nearly 50% of All CPG Coupons Redeemed in 2018

SHARE OF REDEMPTION:



***Forecasted 2018 Final Redemption Rate as a Percentage of Distribution for Active Coupon Offers.

*All Digital Media Methods Include the Digital Blended Media Format.
Source: NCH U.S. CPG Coupon Facts: Year-end 2018 [YOY Share Point Difference vs. 2017]
Projections based upon NCH measurements and proprietary modeling of market activity.
For more information contact 847.317.5500 or visit www.nchmarketing.com.
© 2019 NCH Marketing Services, Inc. All Rights Reserved.