



INTEGRATED PRINT AND DIGITAL PROMOTION

2022 Trends and Insights

CONTENTS

- **THE PROMOTION LANDSCAPE**
- **2022 HIGHLIGHTS**
- **SEASONALITY**
- **PROMOTION TACTICS**
- **WHAT'S NEXT?**

MEDIA COVERAGE

PRINT

FSI Coupons

+

DIGITAL

Leading Network, Aggregator, Brand and Retailer websites, representing 95% of traffic to websites that distribute coupons*

METRICS

PRINT COUPONS DROPPED

The number of coupons on a promotion multiplied by the circulation of that promotion. Not to be confused with Page Circulation.

DIGITAL ESTIMATED PRINTS

Estimated # of prints (whether print at home, load to account or digital rebate) that occurred while a coupon was captured online.

WEIGHTED AVERAGE FACE VALUE

The result of combining and weighting the various coupon face values among a category or set of events and their respective coupon circulations.

ORGANIZATION

CLASS

We report at the Total Consumer Packaged Goods level as well as Food and Non-Food.

AREA

We report nine CPG areas which include Cereals, Dry Grocery, Frozen Foods, Refrigerated Foods, Shelf Stable Beverages, Personal Care, Health Care, Household Goods and Other Packaged Goods.

PRODUCT TYPE

We look at an additional 150 product types to support category-specific insights within our data.

Note: Digital data is sample and excludes properties without comparable year-over-year collection from Digital in Promotion Trends analysis.

THE PROMOTION LANDSCAPE

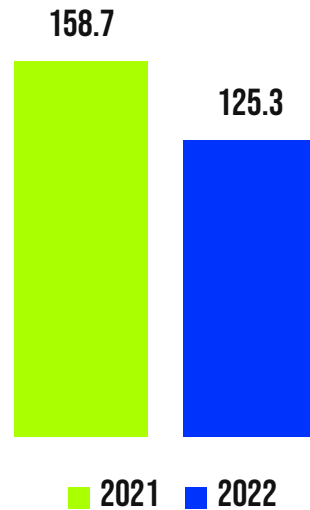
THE PROMOTION LANDSCAPE

	PRINT	DIGITAL	
WEEKLY HOUSEHOLDS	55 MILLION	8.2 MILLION	MONTHLY VISITORS
COUPONS DISTRIBUTED	125 BILLION	10.7 BILLION	COUPONS “CLIPPED”
INCENTIVES OFFERED	\$350 BILLION	\$19.7 BILLION	INCENTIVES “CLIPPED”
PAGES DISTRIBUTED	52 BILLION	730 MILLION	PAGES VIEWED

2022 HIGHLIGHTS

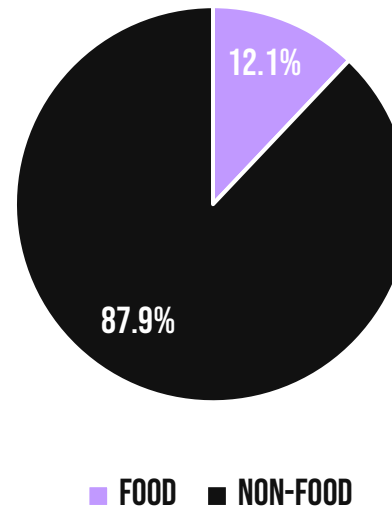
PRINT HIGHLIGHTS

PRINT PROMOTION ACTIVITY
(2021 VS. 2022 IN MM)



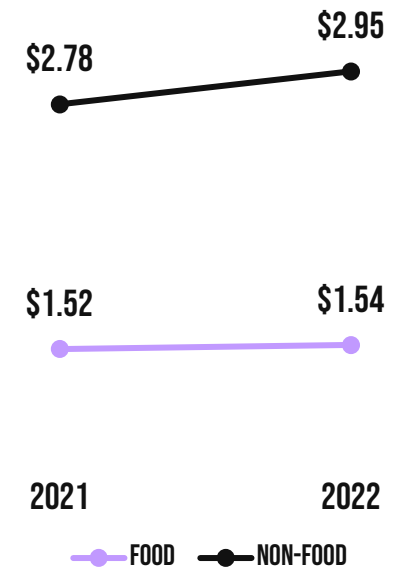
- In 2022, Print promotion activity decreased -21% to 125B coupons dropped
- The decrease was driven by Food areas where coupons dropped decreased a combined -40% vs. 2021
- 165 unique manufacturers participated in FSI couponing in 2022

PRINT PROMOTION ACTIVITY
COUPONS DROPPED (2022 IN MM)



- Non-Food became an even more dominant force in Print couponing, accounting for 88% of total coupons dropped
- The highest couponing segments were Health Care with 48B coupons dropped in 2022 and Personal Care with 47B

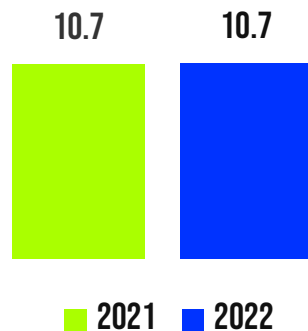
PRINT WAFV FOOD VS. NON-FOOD



- Average Non-Food incentives increased \$0.17 to \$2.95 while Food incentives remained flat
- The largest face value increases were seen in Health Care (+\$0.21) and Personal Care (+\$0.17)

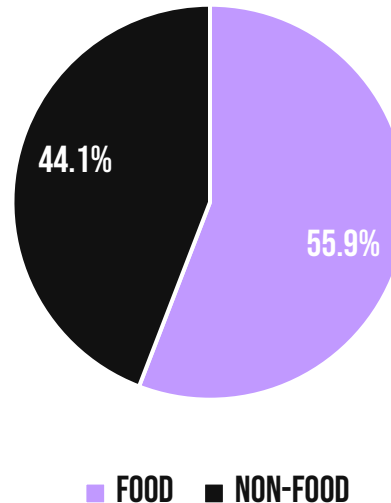
DIGITAL HIGHLIGHTS

DIGITAL ESTIMATED PRINTS
(2021 VS. 2022 IN MM)



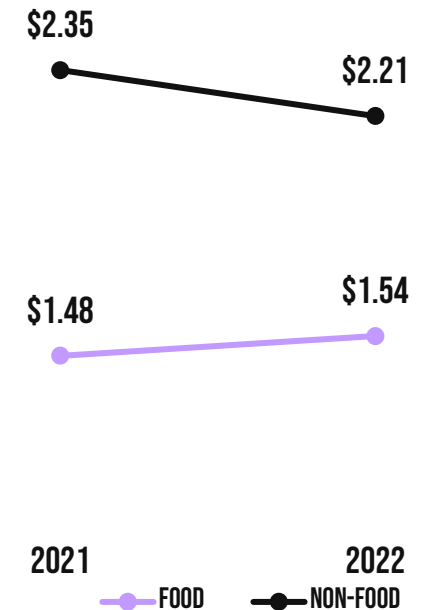
- In 2022, Digital promotion activity remained flat at 10.7B estimated prints
- Non-Food areas showed substantial growth with a combined increase of +11% vs. 2021
- 2,838 unique manufacturers participated in Digital couponing in 2022

DIGITAL PROMOTION ACTIVITY
ESTIMATED PRINTS/CLIPS (2022 IN MM)



- Food and Non-Food moved closer to a 50/50 split with Food maintaining a slight edge at 56% of total estimated prints
- Household Products and Health Care were the fastest growing segments increasing +20% and +19% vs. 2021

WAFV FOOD VS. NON-FOOD
(2021 VS. 2022)



- Average Food incentives increased \$0.06 to \$1.54 while Non-Food incentives decreased -\$0.14 to \$2.21
- The largest increases were seen in Shelf Stable Beverages (+\$0.22) and Personal Care (+\$0.14)

TOP AREAS



- Print coupon activity centered primarily around Health Care and Personal Care with these two areas accounting for 74% of coupons dropped in 2022
- CCSA (Cold, Cough, Sinus & Allergy), Combination/Personal and Vitamins were the top Product Types in Print and 9 of the Top 10 Product Types fell under the umbrella of either Health Care or Personal Care
- Pharmaceuticals had the highest WAFV in Print at \$9.01, followed by Pesticide at \$5.55 and CCSA at \$4.84



- While CPG activity was more evenly spread across all areas in Digital, Dry Grocery continued to have the highest estimated prints in 2022
- Laundry Detergent, Snacks and Alcoholic Beverages were the top Product Types in Digital with Dry Grocery, Household Products, Personal Care, Shelf-Stable Beverages and Cereals all represented among the Top 10 Product Types
- Pharmaceuticals also had the highest WAFV in Digital at \$5.97, followed by Hair Other at \$5.26 and Other Packaged Goods at \$4.56

TOP RETAILERS

PRINT RETAILER PAGES

1. DOLLAR GENERAL
2. FAMILY DOLLAR
3. TARGET ^
4. WALGREENS
5. WALMART

- We captured 5.3B Retailer FSI pages in 2022 accounting for 20% of all pages distributed
- The Value channel continued to dominate Retailer FSIs with Dollar General and Family Dollar each circulating 2B pages
- Target moved up into the 3rd spot this year with Walgreens and Walmart rounding out the Top 5

DIGITAL RETAILER EST. PRINTS

1. KROGER
2. MEIJER ^
3. PUBLIX ^
4. FRY'S ^
5. WALGREENS ^

- Retailer properties accounted for 88% of Digital estimated prints captured in 2022
- 4 of the Top 5 Digital retailers showed year over year increases in estimated prints
- Publix, Fry's and Walgreens entered the Top 5, while HEB, Jewel-Osco and BJ's exited the Top 5

^ Indicates a year over year increase in Retailer rank. Top Print Retailers based on Pages Circulated, Top Digital Retailers based on Estimated Prints.
Note: While ibotta.com generated the 2nd highest estimated prints in 2022, it is classified as a Network property with collection occurring across all available retailers.



VIVVIX

SEASONALITY

SEASONALITY

In **Print**, promotion activity was strongest in January and gradually decreased over the course of the year. Coupons dropped tended to be highest during the first and last weeks of the month with the biggest drop weeks occurring on January 2nd and May 1st.

Highest volume: January

Lowest volume: December

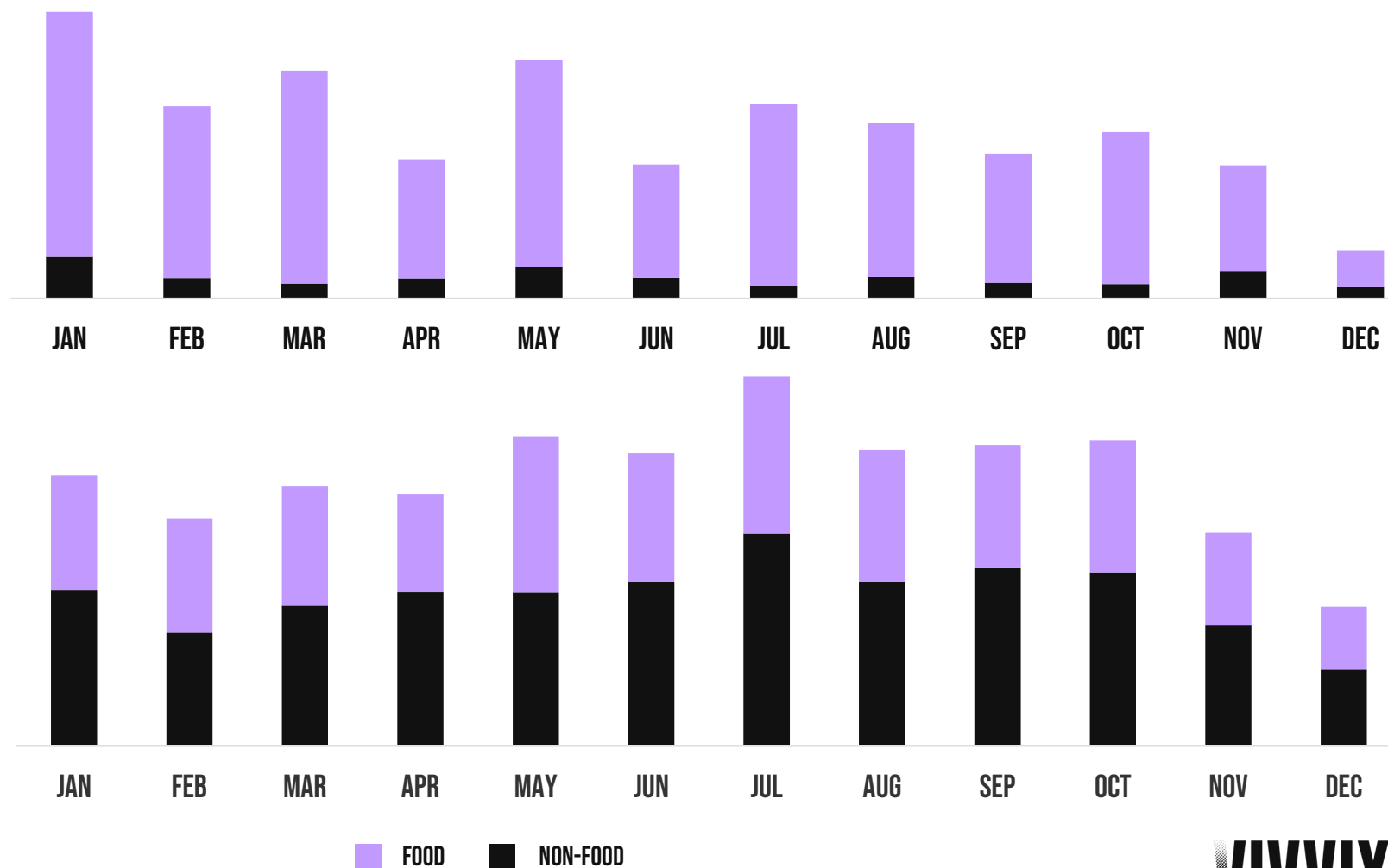
In Digital, promotion activity rose to a peak in July and slowly cooled through the end of the year. Estimated prints were somewhat distributed evenly throughout the month with the biggest drop weeks occurring on July 31st and September 11th.

Highest volume: July

Lowest volume: December

HOLIDAYS

Upticks in Food couponing were seen before the holidays in both Print and Digital: Valentine's Day, Cinco de Mayo, 4th of July, Thanksgiving and Christmas (Digital only)



No FSI coupons were run on April 17th, September 14th, December 18th to December 25th.

VIVVIX

PROMOTION TACTICS

MEDIA COVERAGE

DIGITAL REBATES

1.2B ESTIMATED PRINTS AVERAGING \$1.92

Digital Rebates offer cash or point incentives that can be redeemed post-purchase.

- Promotion activity for Digital Rebates increased 11% to 1.2B estimated prints in 2022 driven by both Food and Non-Food
- Digital Rebates skewed more heavily toward Food which accounted for 63% of total estimated prints
- While Dry Grocery was the top area for Digital Rebates, Household Products was the fastest growing – up +94% vs. 2021
- 7 of 9 areas increased WAFVs in Digital Rebates in 2022

BOGO

1,879 PROMOTION EVENTS AVERAGING \$4.40

BOGO coupons are 'Buy One, Get One' offers – requiring consumers to make a specific purchase in order to receive a free product(s).

Dry Grocery accounted for 808 BOGO events, while Health Care offered the highest WAFV at \$8.85.

FREE PRODUCT

317 PROMOTION EVENTS AVERAGING \$3.28

Free Product coupons offer a product(s) at no cost to the consumer.

Dry Grocery was the top area for Free Product events at 118 events

PERCENT OFF

11,936 PROMOTION EVENTS AVERAGING 19% OFF

Percent Off coupons offer discounts as a percentage of the purchase price rather than a specific dollar amount.

Personal Care, Dry Grocery and Health Care were the top three areas for Percent Off coupons.

FEATURE PRICE

12,757 PROMOTION EVENTS AVERAGING \$5.98

Digital Feature Price offers appear only on retailer websites and feature a sale or discounted price point rather than a redeemable coupon.

83% of all Feature Price coupons were in Food



NEW PRODUCT ACTIVITY

1,823

Number of new products in 2022

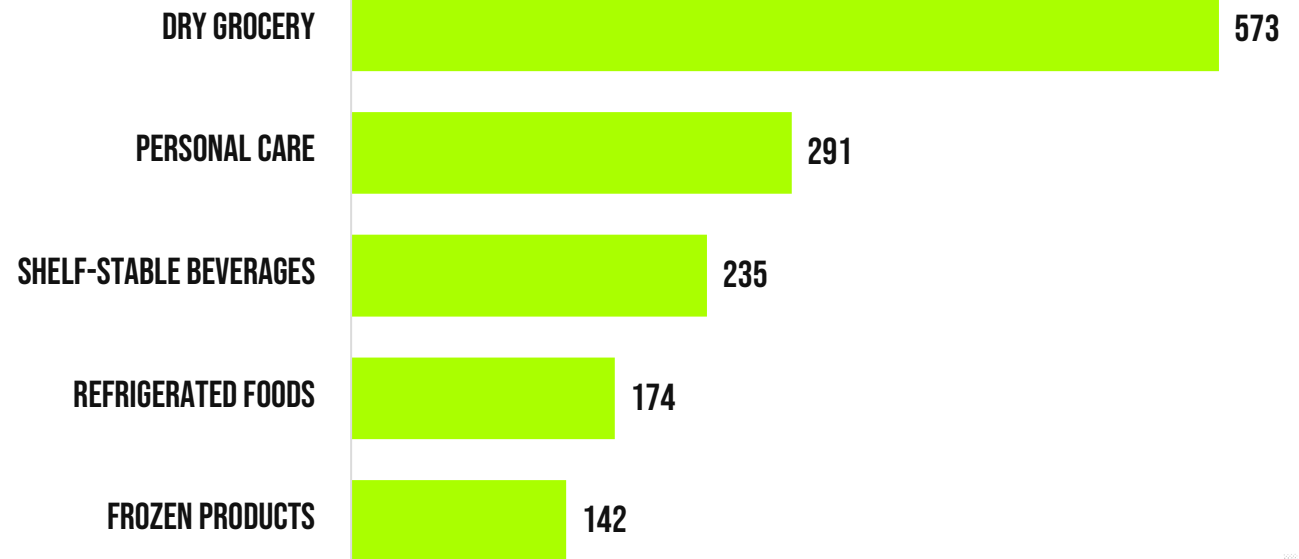
95%

Percentage of new products first seen in Digital

68%

Percentage of new products in Food

TOP 5 NEW PRODUCT AREAS IN 2022



SNAP – SEND – REWARD

Rebate/reward programs offering shoppers cash back, points and gift cards saw increasing popularity for CPGs looking to drive brand loyalty alongside print coupons in 2022.

These deals were often paired with QR codes or redeemable via text message making the redemption process quicker and easier than traditional mail-in rebates.

MANUFACTURER'S COUPON • EXPIRES 2/27/22

\$4 OFF
Any ONE bag of BLUE dry food

VOID

MANUFACTURER'S COUPON • EXPIRES 2/27/22

\$1 OFF
Any TWO cans of BLUE wet food

VOID

MANUFACTURER'S COUPON • EXPIRES 2/27/22

\$1 OFF
Any bag of BLUE treats

VOID

**— OUT WITH THE OLD —
IN WITH THE BLUE —**

2022

Time to switch to delicious, healthy BLUE food and treats for your pet.

Buy 100¢ off BLUE products and earn a **\$5 DIGITAL REWARD**

Buy 100¢ off BLUE products and earn a **\$15 DIGITAL REWARD**

HOW IT WORKS:

SNAP
a photo of your receipt

TEXT
your photo & "BLUEOFFALLOY" to 81811

REGISTER
to earn your digital reward

SwitchToBlueBuffalo.com

Valid on purchases of qualifying Blue Buffalo products (pre-tax and discounts) from participating retailers in a single transaction from 11/27/21 at 12:00:00 a.m. Eastern Time through 11/27/22 at 11:59:59 p.m. Eastern Time. Reward must claim after purchase and, while time & location, and product purchased, and may be used only once. Open to residents of the 50 states in the United States and the District of Columbia, 18 years of age or older (13 or older in AL or NE, 21 or older in MS) at the time of participation. Blue & Gold Extra Mile Apply. By having BLUEOFFALLOY to 81811, and upon submitting your receipt online, you consent to receive up to 3 text messages. Unfollowing this program only from Snap Interactive or behalf of Sponsor via an automatic telephone dialing system to the number you provide. 1st HELP for help STOP to stop. Your consent to the above is not required to make a purchase. Void where participation is prohibited, limited, or restricted. Rewards available while supplies last. See Terms and Conditions. Participation Mechanism and Privacy Policy can be found at www.SwitchToBlueBuffalo.com. Sponsor: Blue Buffalo Company, Ltd. 15 River Road, Wilton, Connecticut 06097. All Rights Reserved © 2022 Blue Buffalo Company, Ltd.

Biore

LOVE YOUR PORES

BUY 2 BIORE® PRODUCTS, GET A \$50 eGIFT CARD

Offer good through 3/15/2022, receipt is required. For participating Biore products scan code below.

MANUFACTURER'S COUPON • EXPIRES 3/20/2022

SAVE \$2.00
OFF ANY (1) ONE Biore® Cleanser (face & body)

VOID

MANUFACTURER'S COUPON • EXPIRES 3/20/2022

SAVE \$2.00
OFF ANY (1) ONE Biore® Pore Strip Product (face & body)

VOID

GET MORE WITH Energizer Go Rewards

Join or Log In to Energizer Go Rewards™ and get **50 BONUS POINTS** on us with promo code **BunnyPoints**.

SCAN to Learn More

Start earning rewards in 3 simple steps:

1. Purchase a product
2. Earn Points
3. Redeem Rewards

Plus, register or log in today and you can earn 50 bonus points for a limited time! Just click on "Earn Points" on the home page and enter promo code **BunnyPoints**.

EnergizerGoRewards.com

MANUFACTURER'S COUPON • EXPIRES ON 04/09/2022

Save \$0.75
on any ONE (1) pack of Energizer batteries or lights up to 20 ct.

VOID

MANUFACTURER'S COUPON • EXPIRES ON 04/16/2022

Save \$0.50
on any ONE (1) pack of Energizer hearing aid batteries up to 20 ct.

VOID

THIS FALL

BUY MORE & GET MORE

FOR YOUR WHOLE FAMILY'S WELLNESS ROUTINE

BUY \$30 & GET \$10

BUY \$30 of participating products between 8/7/22 - 9/3/22

SNAP a photo of your valid receipt & upload to: www.wellnessroutinepromo.com or text: WELLNESSROUTINEPROMO to 81811

GET a \$10 digital reward via email!

JELLY BEANS

IMMUNE

SLEEP

DIGESTIVE

HEART & JOINT

WHOLE FAMILY

Nestle HealthScience

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CREATIVE MESSAGING

FSI creatives serve as an added layer of brand marketing alongside CPG coupons – helping shoppers choose products that align with their values.

In 2022, CPGs utilized this space to promote positive messages of inclusion and diversity and introduce environmental initiatives from planting trees and bee conservancy to reducing plastic waste.



2023 EXPANDED DIGITAL FOOTPRINT

FETCH REWARDS AND SHOPMIUM

AVAILABLE NOW

**WHAT'S
NEXT?**

LOOKING FORWARD

In 2022, the US Consumer Price Index rose 6.5%* indicating that on average consumers paid more for goods and services than they did in 2021. As prices increase, shopper baskets shrink, and CPG brands run the risk of being dropped along the path to purchase. Strategic promotion planning can add the value necessary to ensure their products make it to the register.

In Print, an increasingly popular approach to incentivize shoppers utilizes the creative space to communicate additional savings and reinforce brand loyalty – particularly for Non-Food. QR codes allow rebate and reward programs to digitize making redemption easier than ever. In addition, CPGs are marketing messages that matter to increase reputation and encourage purchases across the entire brand profile.

In Digital, Food continues to be extremely competitive with incentives increasing, Digital Rebates rising and a wealth of new products couponing. The Digital Promotion landscape is complicated and ever-changing – so keeping a close eye on the competition to counter up-and-coming tactics is essential to making the cut with coupon-savvy shoppers.

* Source: Bureau of Labor Statistics, U.S. Department of Labor, The Economics Daily, Consumer Price Index: 2022 in review at <https://www.bls.gov/opub/ted/2023/consumer-price-index-2022-in-review.htm>

OUTMANEUVER COMPETITORS WHEREVER THEY PLAY

Learn how these industry trends affect your category and how key competitors use Promotion to support their brands.

Contact your Vivvix account manager or our Client Success team to schedule a review.

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