

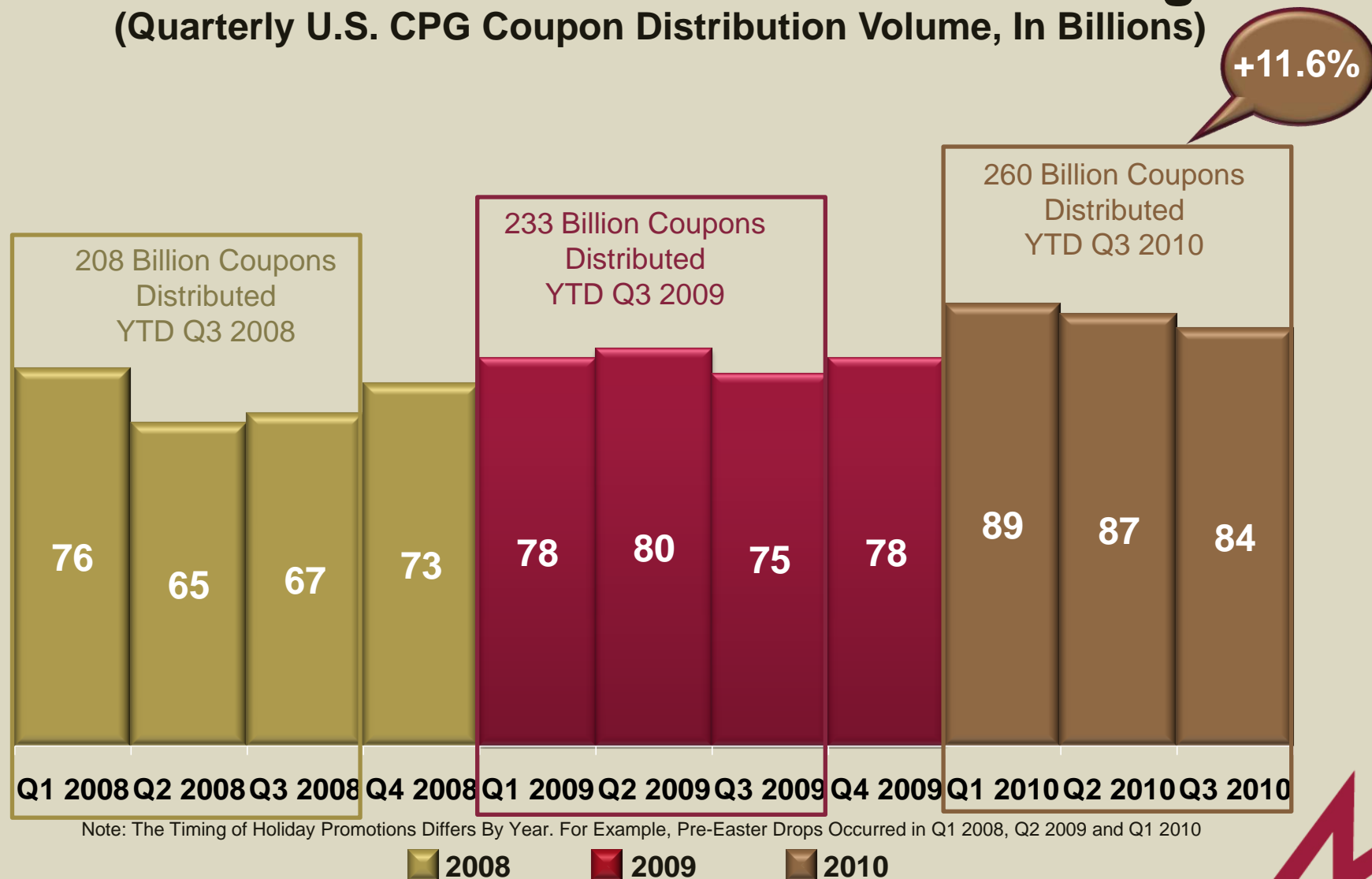
# **3<sup>rd</sup> Quarter 2010**

# **CPG Coupon Industry Facts**

Reported By NCH, October 2010

# YTD 3<sup>rd</sup> Quarter 2010 CPG Coupon Distribution Continues To Grow Above Record Breaking 2009

(Quarterly U.S. CPG Coupon Distribution Volume, In Billions)



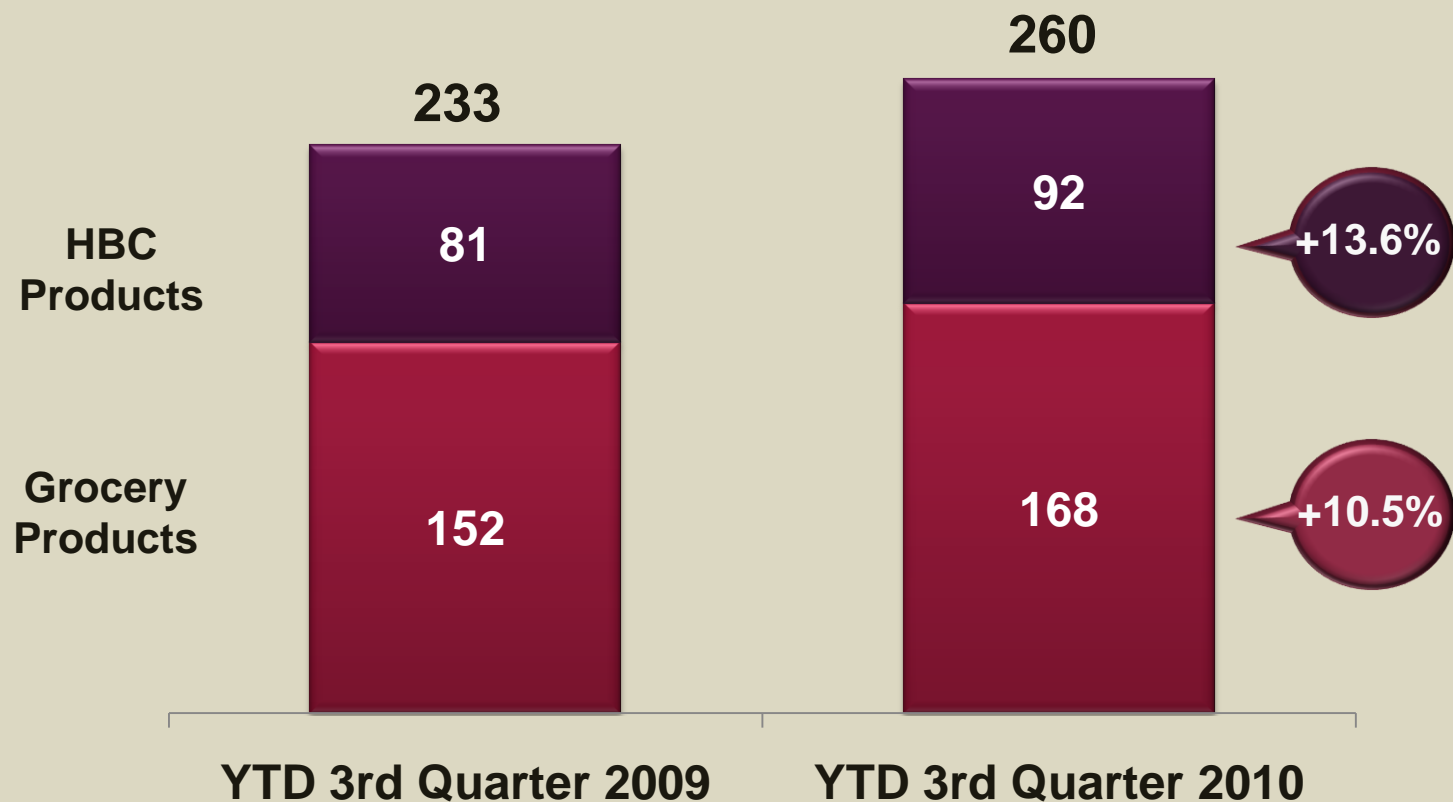
Source: NCH Marketing Services, Inc., 3<sup>rd</sup> Quarter 2010 Coupon Facts Report

Chart 2

Projections Based Upon NCH Measurements and Proprietary Modeling of Market Activity

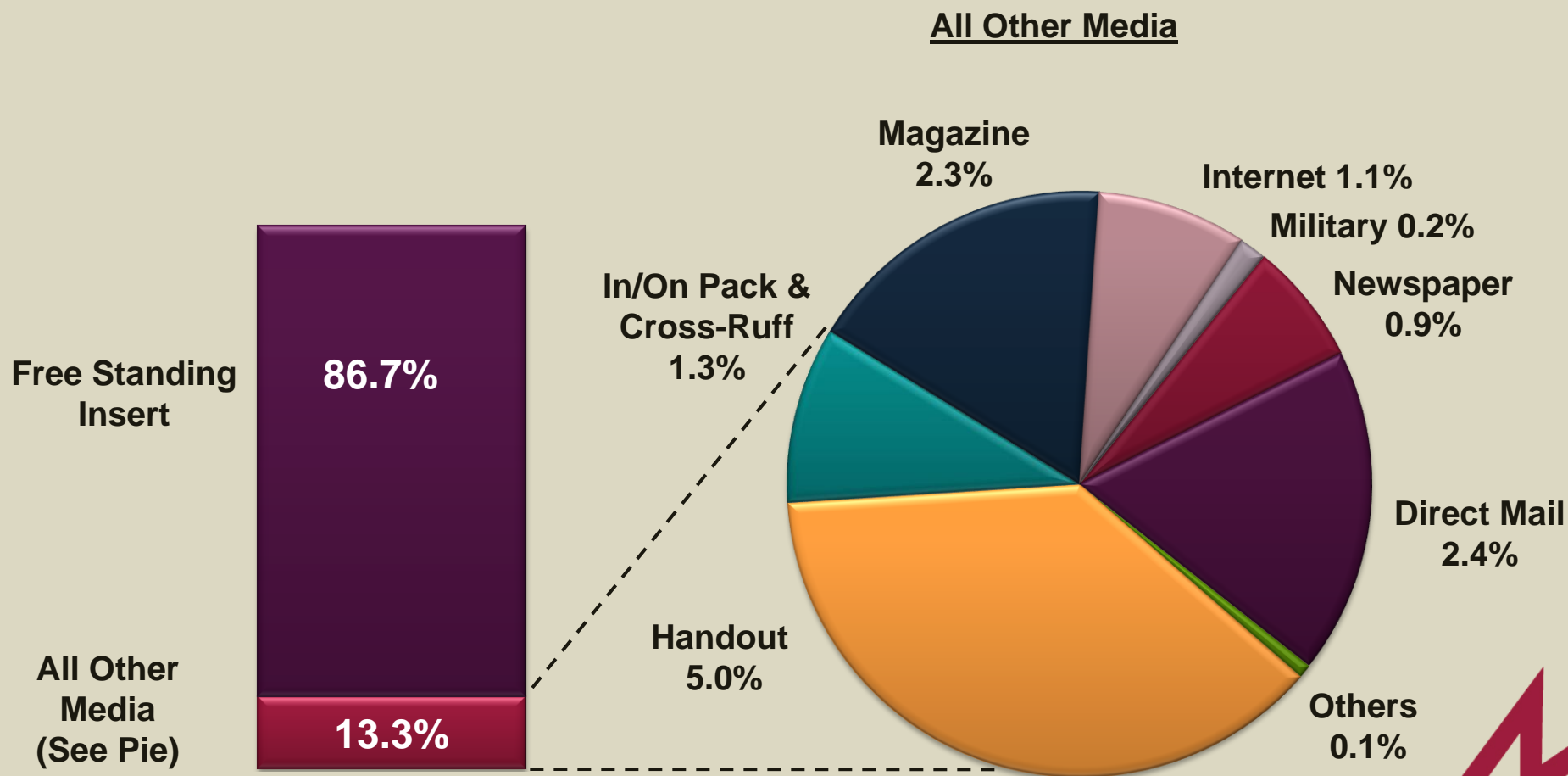
# CPG Marketers In Both Grocery And HBC Segments Are Increasing The Quantity Of Coupons Distributed

(U.S. CPG Coupon Distribution Volume By Segment, In Billions)



# CPG Marketers Allocated An Even Larger Share Of Coupon Distribution To FSI's YTD 3<sup>rd</sup> Quarter 2010, Up 1.7 Share Points Since Mid-Year 2010

(Percent Of Total U.S. CPG Coupon Distribution Volume By Media)



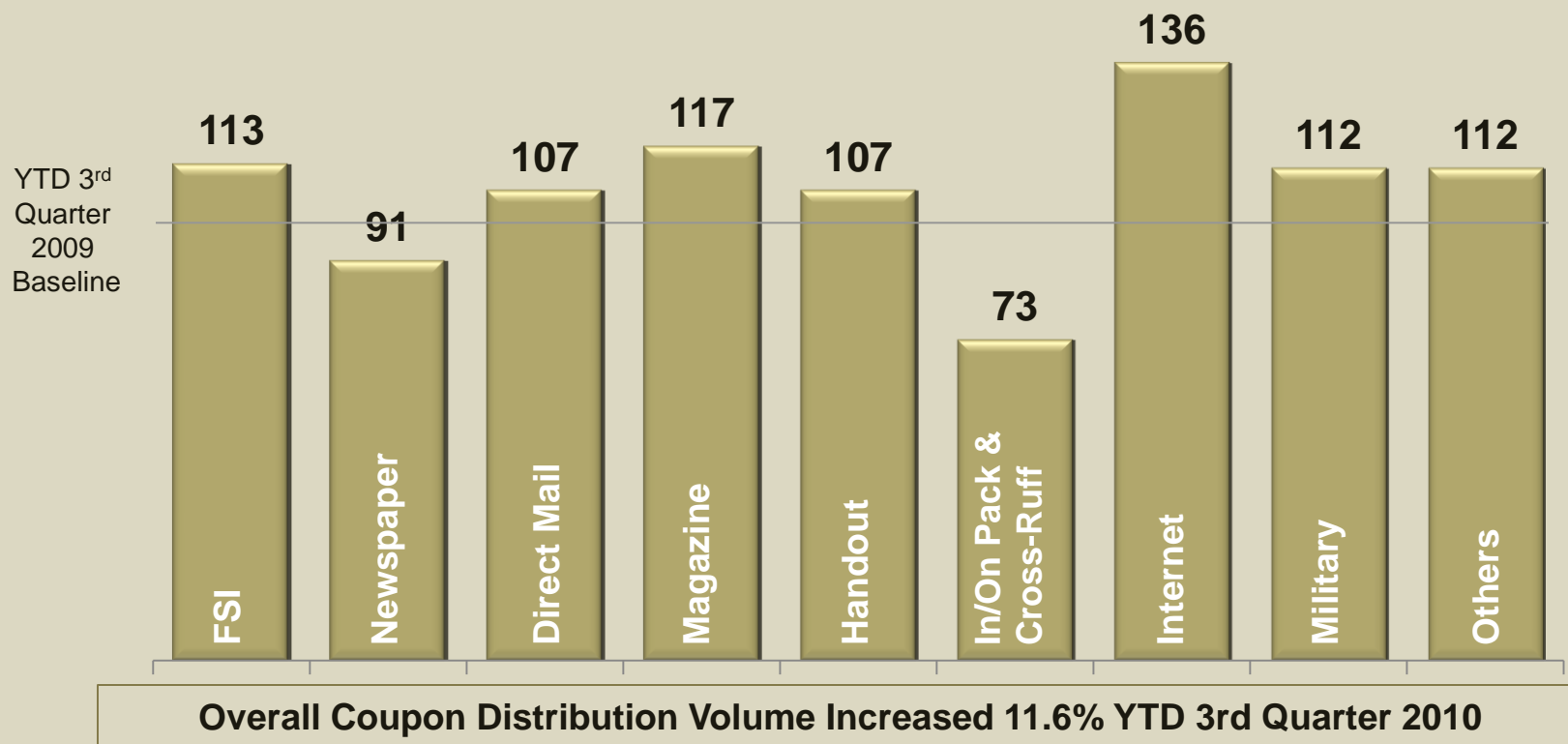
Source: NCH Marketing Services, Inc., 3<sup>rd</sup> Quarter 2010 Coupon Facts Report

Chart 4

Projections Based Upon NCH Measurements and Proprietary Modeling of Market Activity

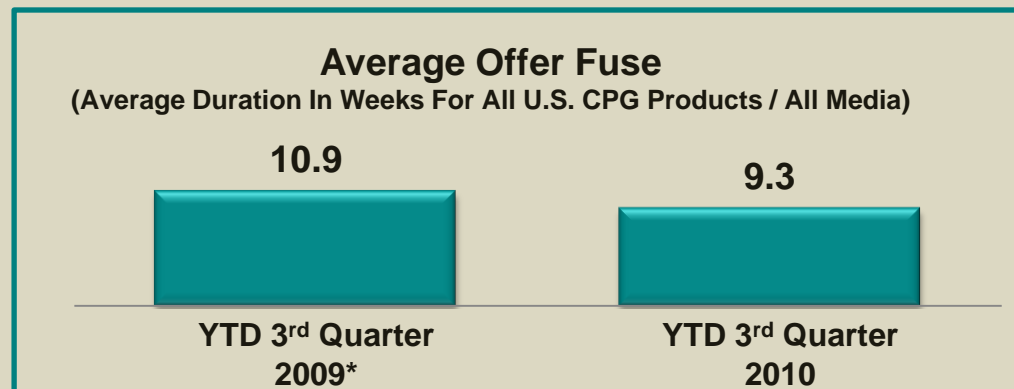
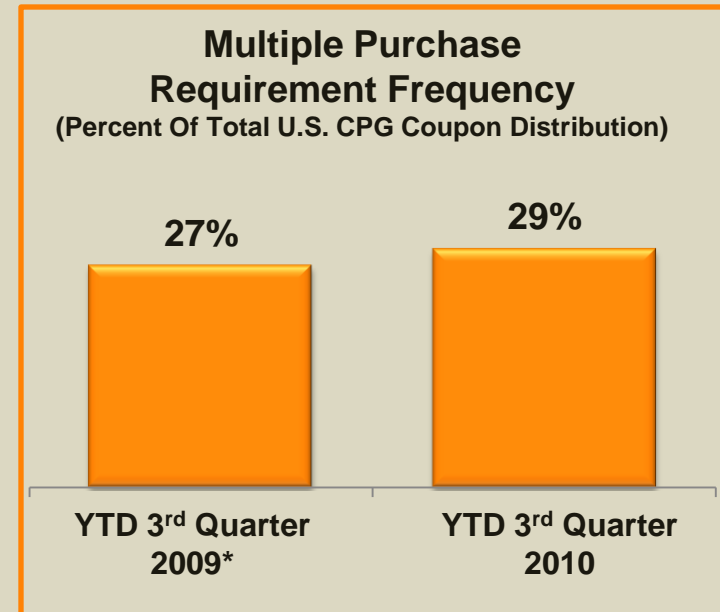
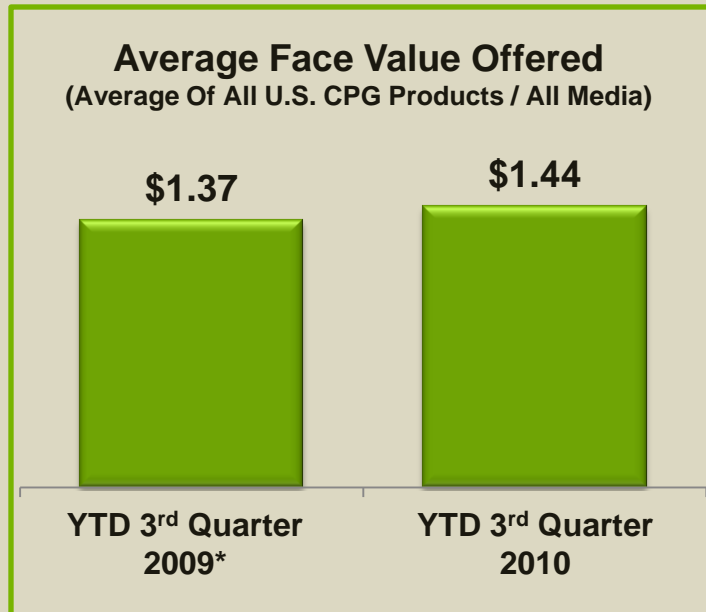
# YTD 3<sup>rd</sup> Quarter 2010 Index Of Coupon Distribution Media Change Compared To Year Ago

(Index Of Total U.S. CPG Coupon Distribution Volume By Media, Baseline YTD 3<sup>rd</sup> Quarter 2009)



# CPG Marketers Have Increased Purchase Requirements And Shortened Offer Durations By A Week And A Half

(All U.S. CPG Products / All Media)



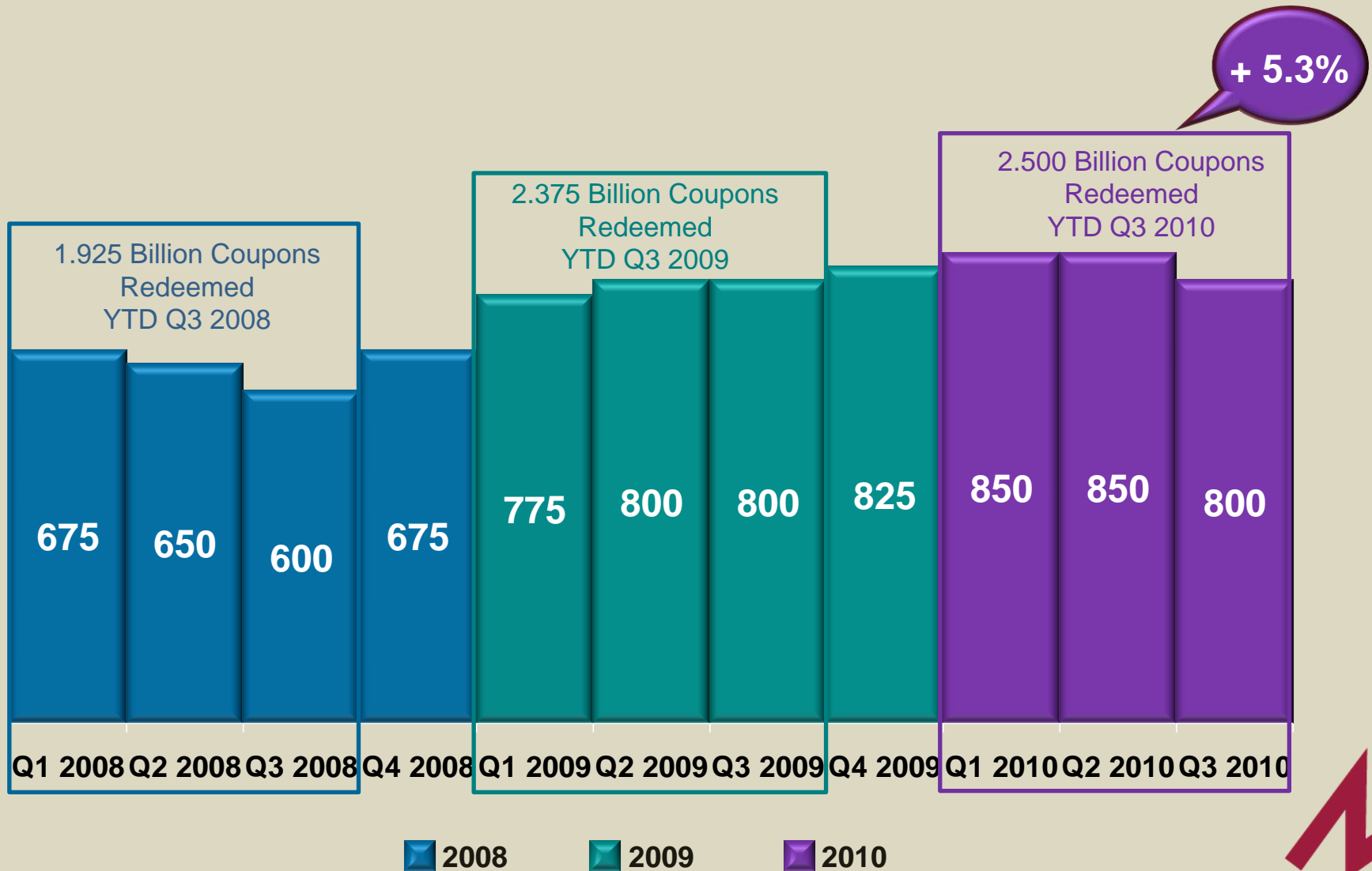
# CPG Marketers Have Managed Consumer Savings Growth By Modifying Offer Characteristics

(Total U.S. CPG Redeemed Coupon Savings In Billions Of Dollars)



# YTD 3<sup>rd</sup> Quarter CPG Coupon Redemption Volume Continues To Sustain The High Levels Obtained Last Year

(Quarterly U.S. CPG Coupon Redemption Volume, In Millions)



Source: NCH Marketing Services, Inc., 3<sup>rd</sup> Quarter 2010 Coupon Facts Report

Chart 8

Projections Based Upon NCH Measurements and Proprietary Modeling of Market Activity





# The Largest Coupon Redemption Volume Growth Is In The Retail Segment That Includes Dollar Stores

(Percent Change In Class Of Trade Of Total U.S. CPG Coupon Redemption Volume  
YTD 3<sup>rd</sup> Quarter 2009 vs. YTD 3<sup>rd</sup> Quarter 2010)

