

Prepared by

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CATALINA[®]

Catalina Shopper Research 2025

July 2025



Objectives and Methodology

- This report provides insights into the attitudes of UK grocery shoppers to coupons to update previous feedback in 2022
- In particular to understand the value placed on coupons by UK shoppers, including their attitudes to paper vs digital as well as the impact of colour coupons on the shopper experience
- The insights will be used by Catalina to input to conversations with existing clients, as well as to support conversations with new retailers

Methodology

- 10-minute online survey
- 1,000 interviews
- Sample representative of UK grocery shoppers in terms of gender, age, region, social grade

Key Findings



Coupons remain popular and shoppers still want more of them

- 50% of shoppers feel they receive too few paper coupons and for 32% of shoppers, their first preference is to have their coupons printed at the till (this has increased from 25% in 2022)
- Colour coupons have strong cut through: 51% of Morrisons shoppers and 68% of Sainsbury's shoppers are aware they receive colour coupons (rising to three quarters of main shoppers). 63% who receive colour coupons feel they are more noticeable, with a third more likely to redeem them



Digital coupons are becoming increasingly popular – in a head-to-head with paper preferred by 35% vs 17% in 2022

- However there are signs of potential digital overload with 35% of the most digitally enabled Gen Z generation saying they receive too many digital coupons compared to 29% who say they receive too few

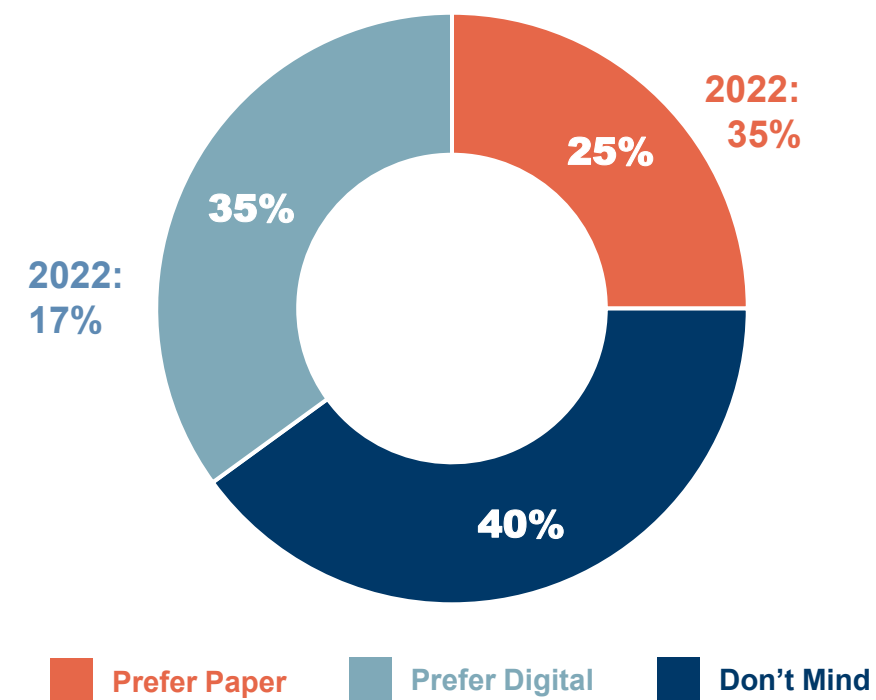


Personalised coupons are desired by 60% of shoppers

- Particularly receiving money off previously bought products – 1st preference for 35%
- In addition, 74% say that personalised coupons increase the likelihood of shopping at a supermarket and 69% that they would make them more likely to try new/ different products

Although digital coupons have become more popular since 2022, only **35% in 2025 have outright preference for digital** with a **quarter preferring paper** and a further **40% open to both**.

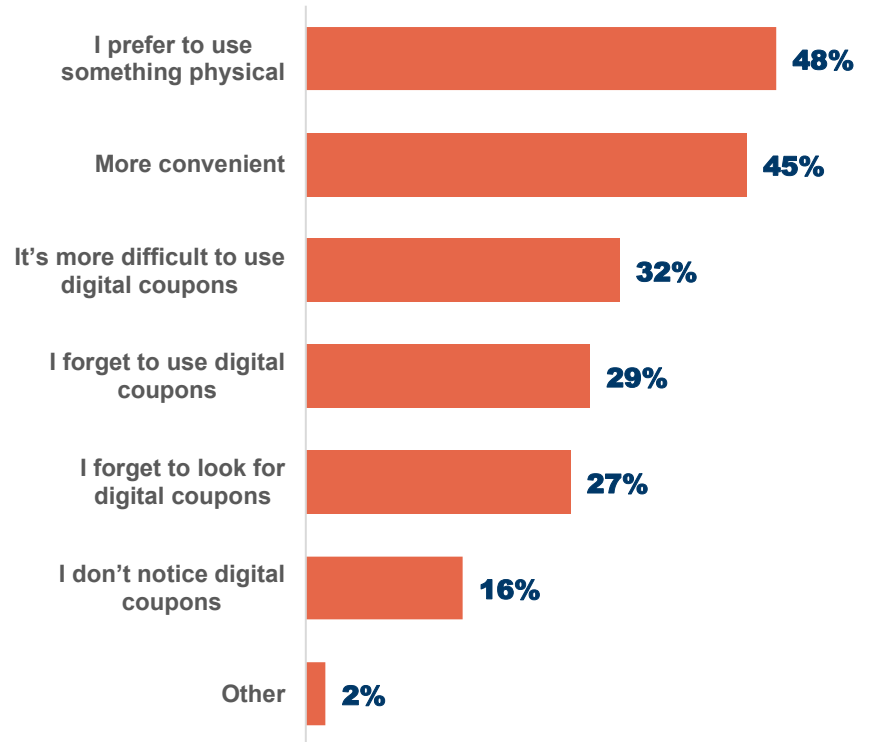
Preference for using paper or digital coupons:



Paper coupons most popular among main shoppers at Aldi & Iceland:

- Aldi **33%**
- Iceland **31%**
- Tesco **28%**
- Sainsbury's **22%**
- Waitrose **21%**
- Asda **21%**
- Lidl **20%**
- Morrisons **18%**

Convenience and preference for something physical are the main drivers for paper coupon preference



Baby Boomers are unsurprisingly most in favour of paper coupons. Indicatively, those Gen Z consumers who prefer paper coupons, find them more convenient than Millennials (caution low base).

Preference for using paper or digital coupons:

	Gen Z	Millennial	Gen X	Baby Boomers +
Prefer paper coupons	22%	19%	24%	32%
I don't mind	42%	30%	43%	44%
Prefer digital coupons	36%	50%	33%	24%

Reasons for paper coupon preference:

More convenient	48%	31%	46%	49%
I forget to use digital coupons	24%	19%	29%	34%
I don't notice digital coupons	14%	17%	16%	16%
I forget to look for digital coupons	38%	27%	19%	29%
It's more difficult to use digital coupons	31%	35%	23%	37%
I prefer to use something physical	38%	42%	45%	57%

Very low
bases

Source: A4. Do you prefer to use coupons printed on paper or digital coupons (e.g. via an app or online)?
Base: All respondents (1000) Gen Z (132), Millennial (250), Gen X (286), Baby Boomers (332) A5a. Why do you prefer to use paper coupons rather than digital coupons?
Base: All who prefer paper coupons (252), Gen Z (29), Millennial (48), Gen X (69), Baby Boomers (106)

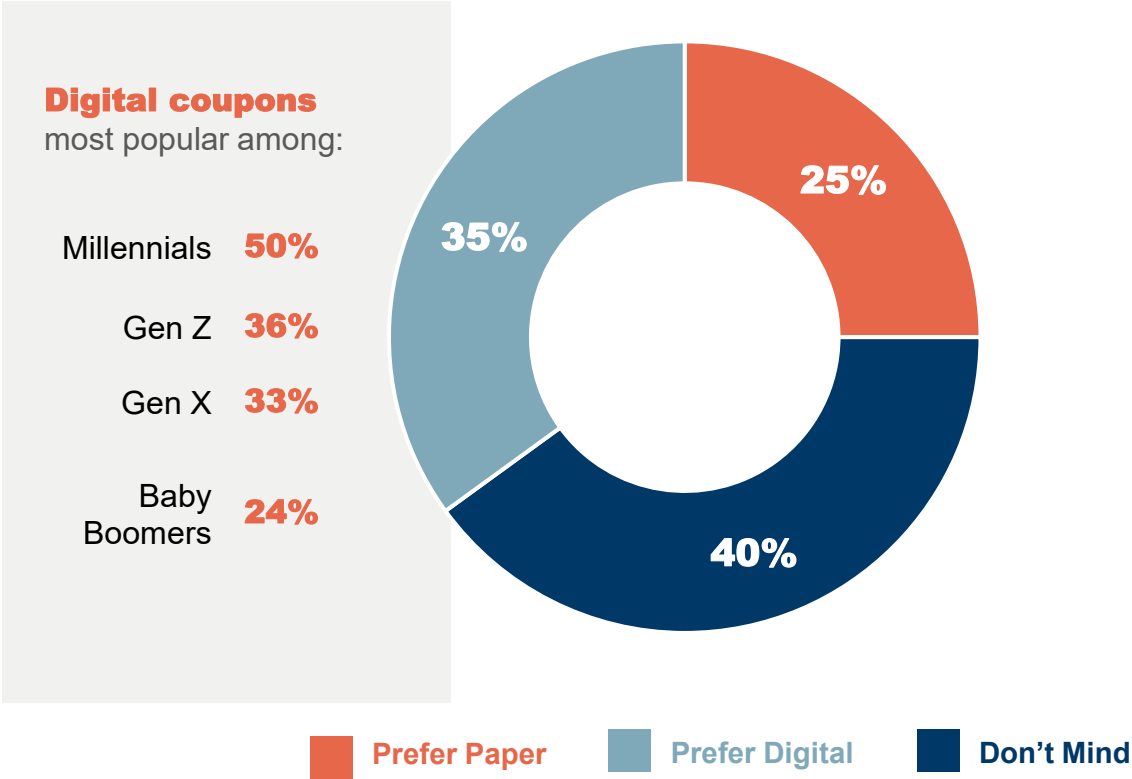
Comparative Summary:

Preference for paper vs digital coupons, 2025 vs 2022

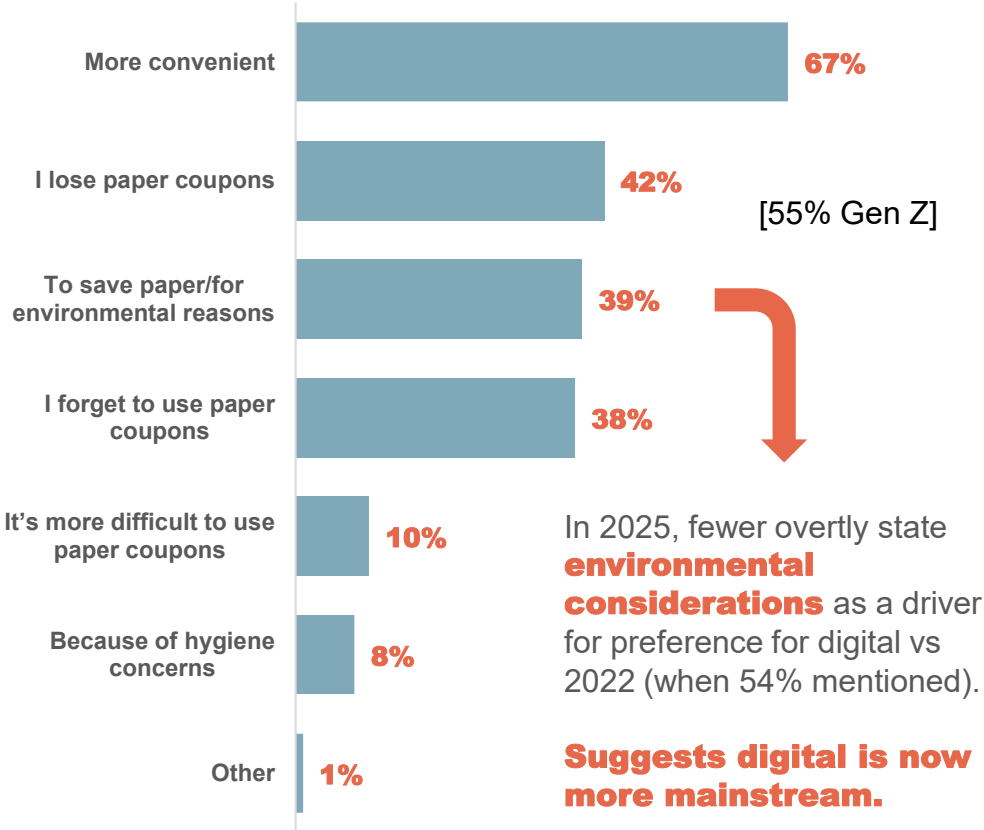
		Grand Total	Male	Female	Gen Z (2022:18-34)	Millennial (2022: 35-54)	Gen X (2022: 55-64)	Baby Boomers + (2022: 65+)	North, Scotland, NI	West Midlands, Wales	East	South	ABC1	C2DE
2025	Prefer paper coupons	25%	26%	25%	22%	19%	24%	32%	25%	25%	29%	24%	21%	30%
	Prefer digital coupons	35%	33%	36%	36%	50%	33%	24%	36%	22%	36%	38%	39%	30%
2022	Prefer paper coupons	35%	35%	36%	31%	29%	38%	48%	35%	38%	31%	36%	36%	35%
	Prefer digital coupons	17%	17%	18%	24%	22%	11%	9%	17%	17%	19%	18%	19%	16%

Digital coupons are most likely to be **preferred by Millennials (50%)**, the first fully digital generation and unsurprisingly are least preferred by Baby Boomers+.

Preference for using paper or digital coupons:



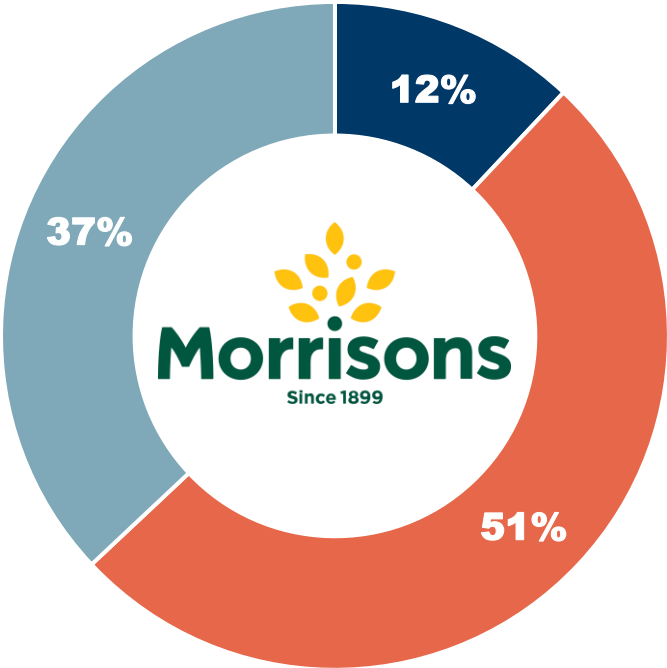
Convenience is the key driver for digital coupon preference.
55% of Gen Z shoppers say they lose paper coupons



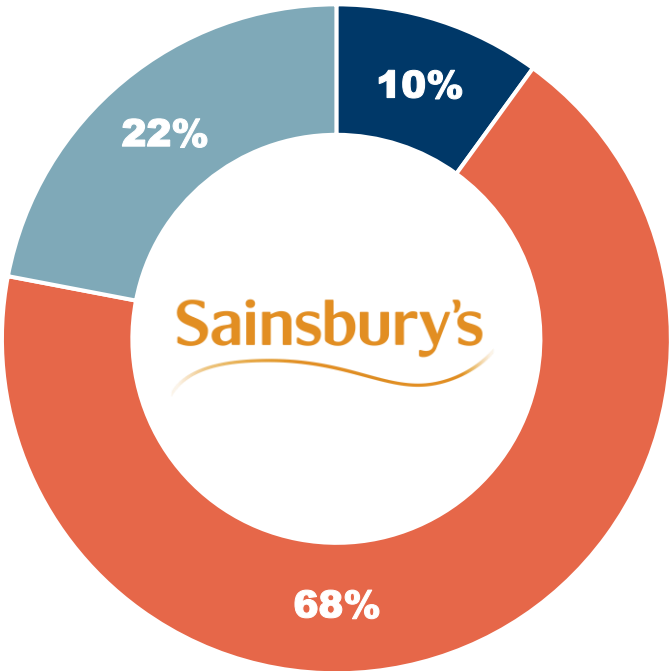
Source: A4. Do you prefer to use coupons printed on paper or digital coupons (e.g. via an app or online)?
Base: All respondents (1000) A5b. Why do you prefer to use digital coupons (e.g. via an app or online) rather than paper coupons?
Base: All who prefer digital coupons (347)

Colour coupons have strong cut through for both Morrisons and especially Sainsbury's shoppers.

51% of Morrisons shoppers are aware they receive colour coupons rising to **74%** of main shoppers



68% of Sainsbury's shoppers are aware they receive colour coupons rising to **75%** of main shoppers

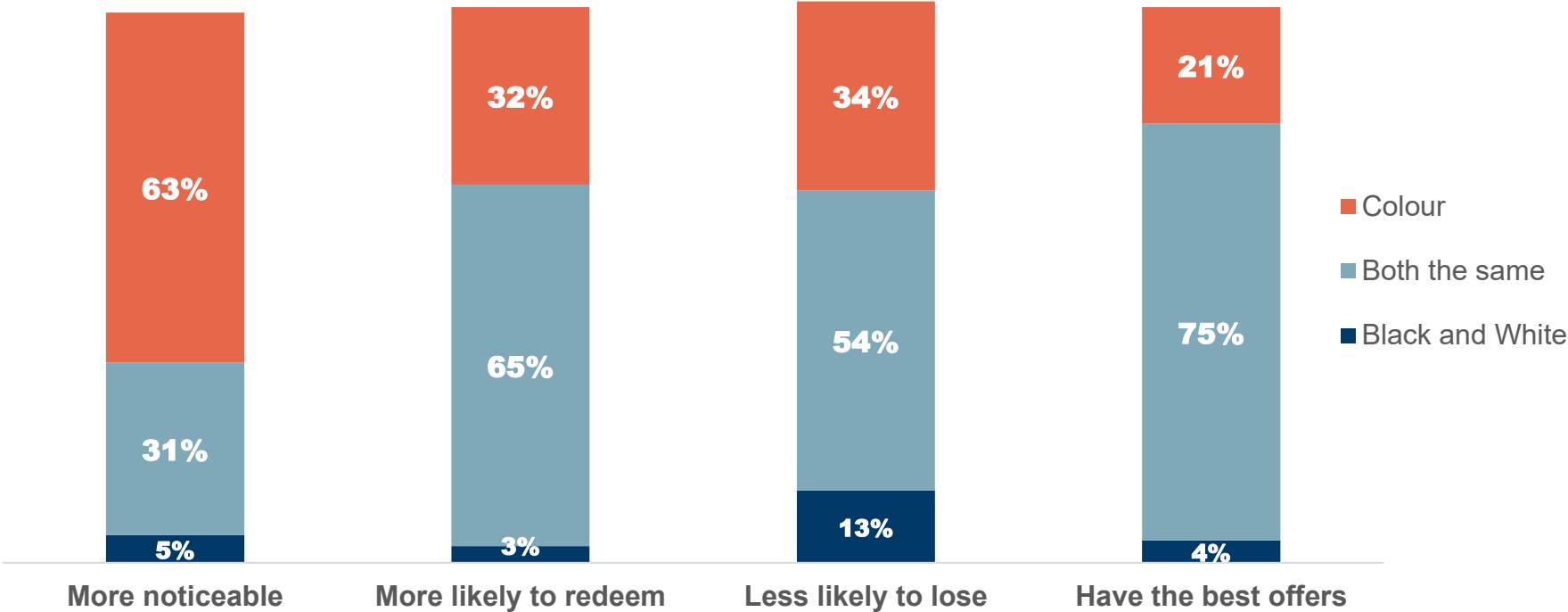


- Black & White
- Colour
- Unsure

Source: A2d. What colour are the paper coupons you receive from Morrisons? Base: All respondents that receive paper coupons and shop at Morrisons (272), A2e. What colour are the paper coupons you receive from Sainsbury's? Base: All respondents that receive paper coupons and shop at Sainsbury's (402),

Colour coupons are more likely to be noticed, to be redeemed and less likely to be lost by shoppers that receive them.

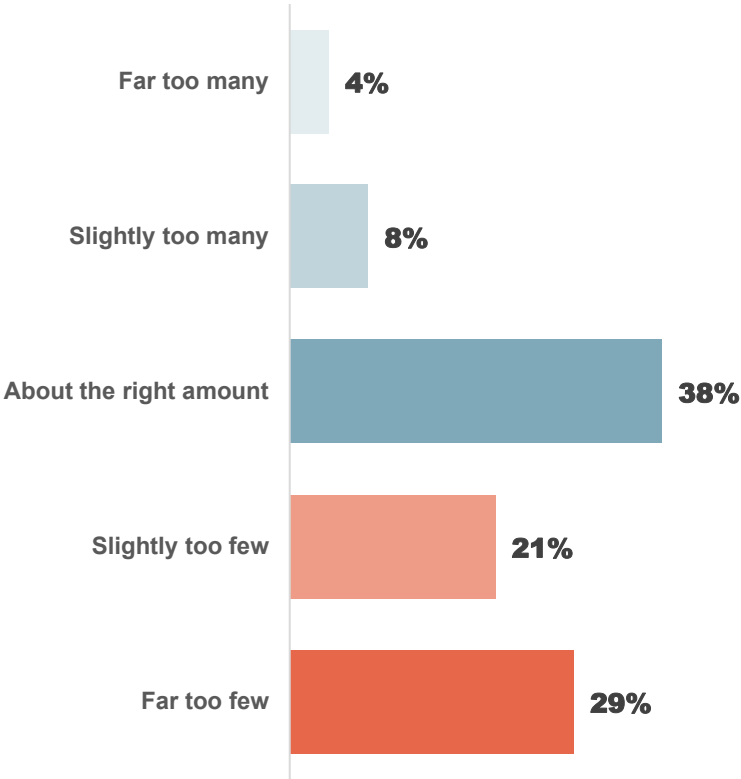
Colour vs black & white coupons – which are best: (among those knowing they receive colour coupons)



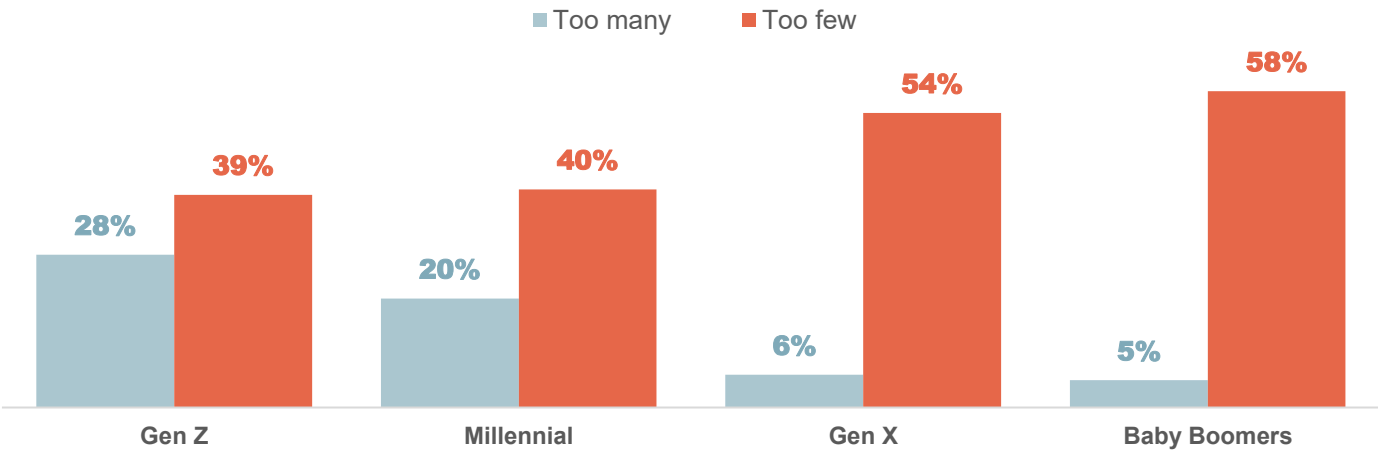
Similar positive responses to colour coupons from both Sainsbury's and Morrisons shoppers.

Half of shoppers say they receive too few paper coupons – even Gen Z & Millennials more likely to say they receive too few paper coupons vs too many.

Whether receive too many or too few **paper** coupons when shopping online for food & groceries:

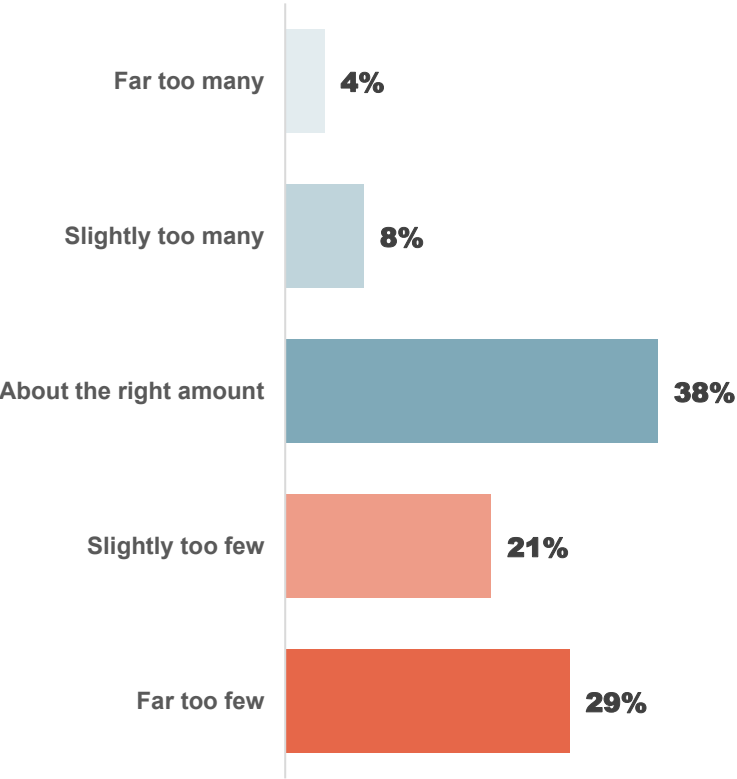


Is everything digital becoming too much and shoppers are beginning to prefer paper as it's simpler and easier?

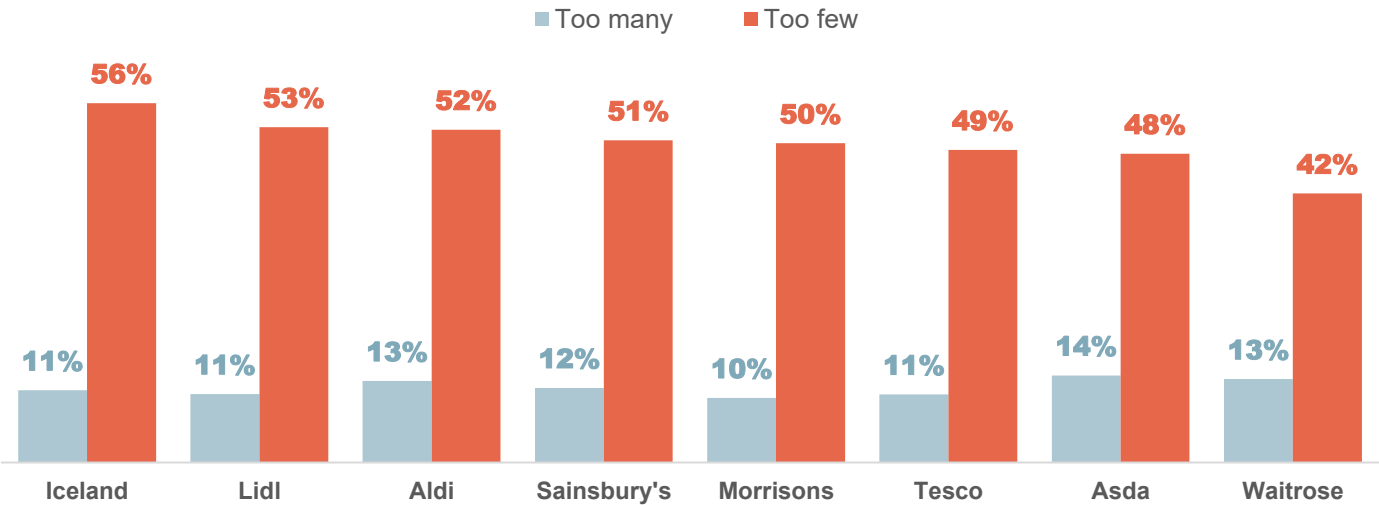


Shoppers using all retailers want more paper coupons, **especially Iceland shoppers.**

Whether receive too many or too few **paper** coupons when shopping online for food & groceries:

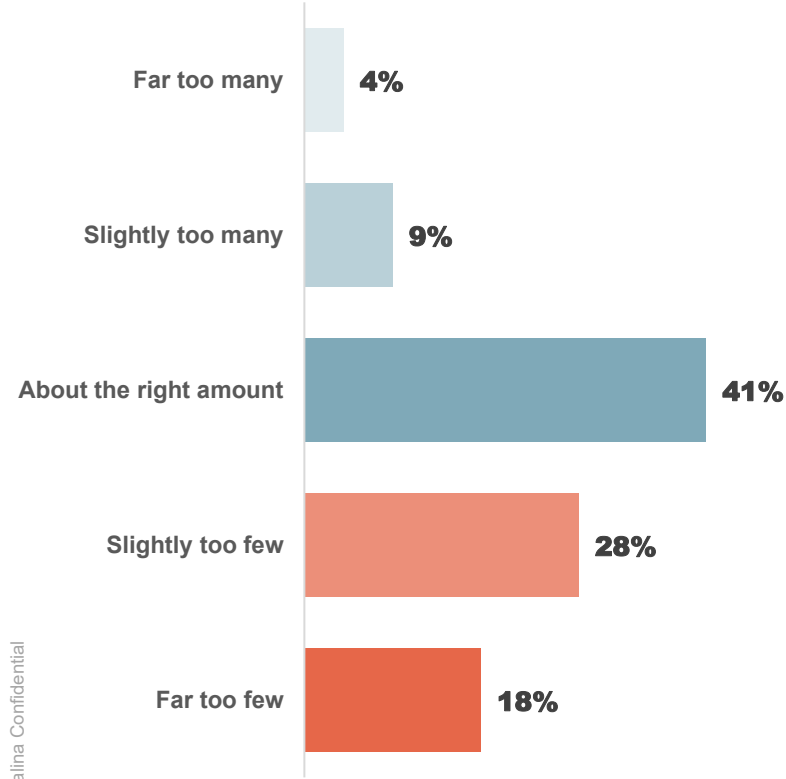


Appetite for more paper coupons strongest for **Iceland** shoppers

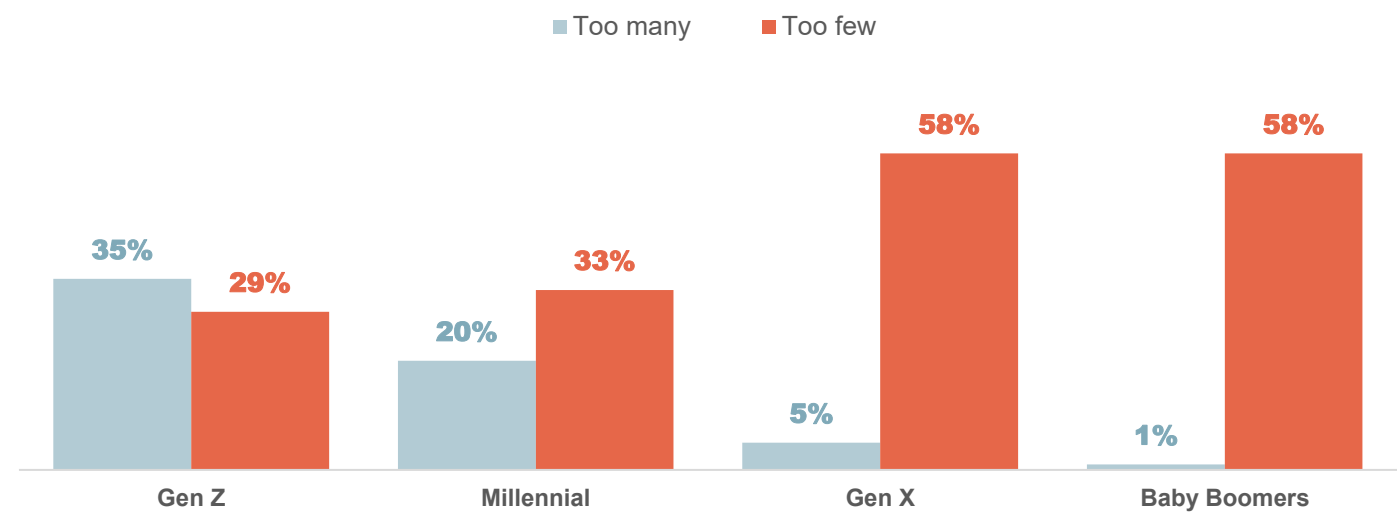


Interestingly **Gen Z** who lead the most digital lives, are **more likely to say they receive too many vs too few digital coupons.**

Whether receive too many or too few **digital** coupons when shopping online for food & groceries:



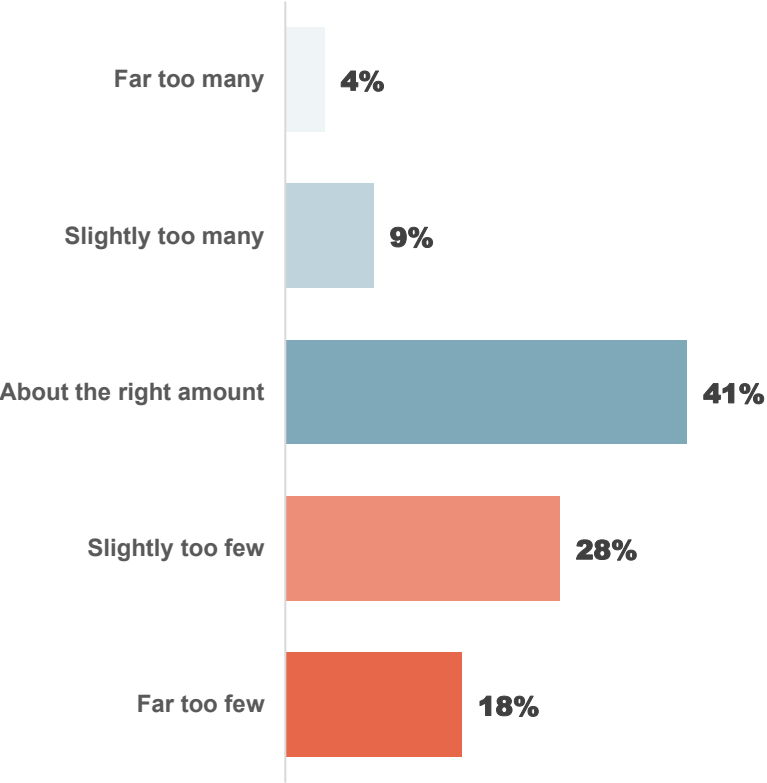
Older shoppers who are less familiar with digital, are most likely to want more offers via this channel



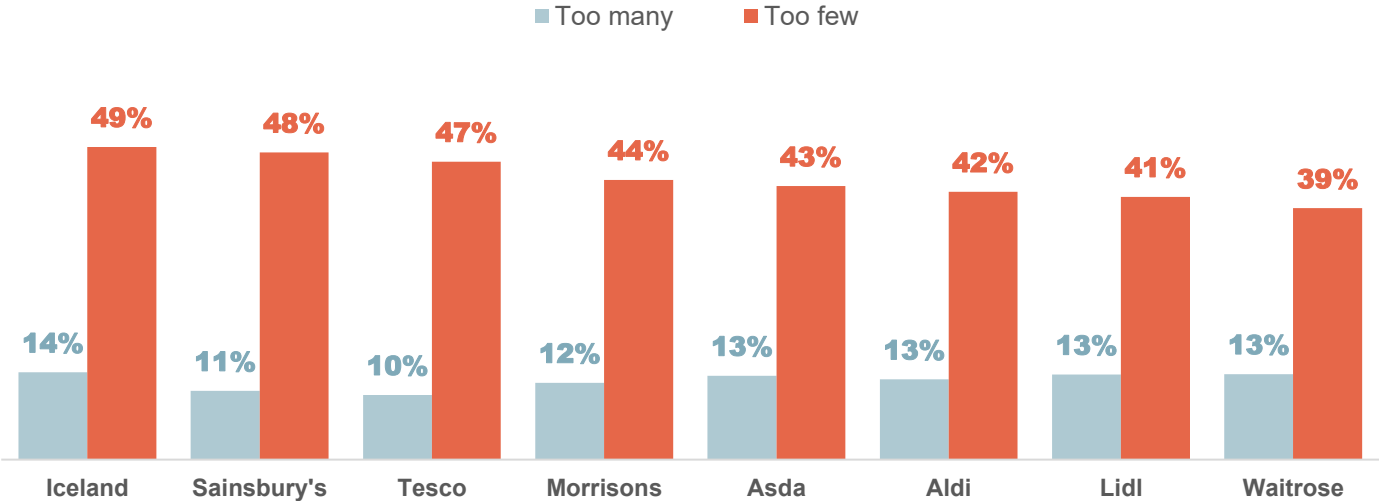
Source: A1b. How do you feel about the frequency of receiving digital coupons when you shop online for food and groceries?
Base: All who shop online (493), Gen Z (63), Millennial (167), Gen X (144), Baby Boomers (119)

There is appetite for receiving **more digital coupons** among online shoppers at all supermarkets.

Whether receive too many or too few **digital** coupons when shopping online for food & groceries:

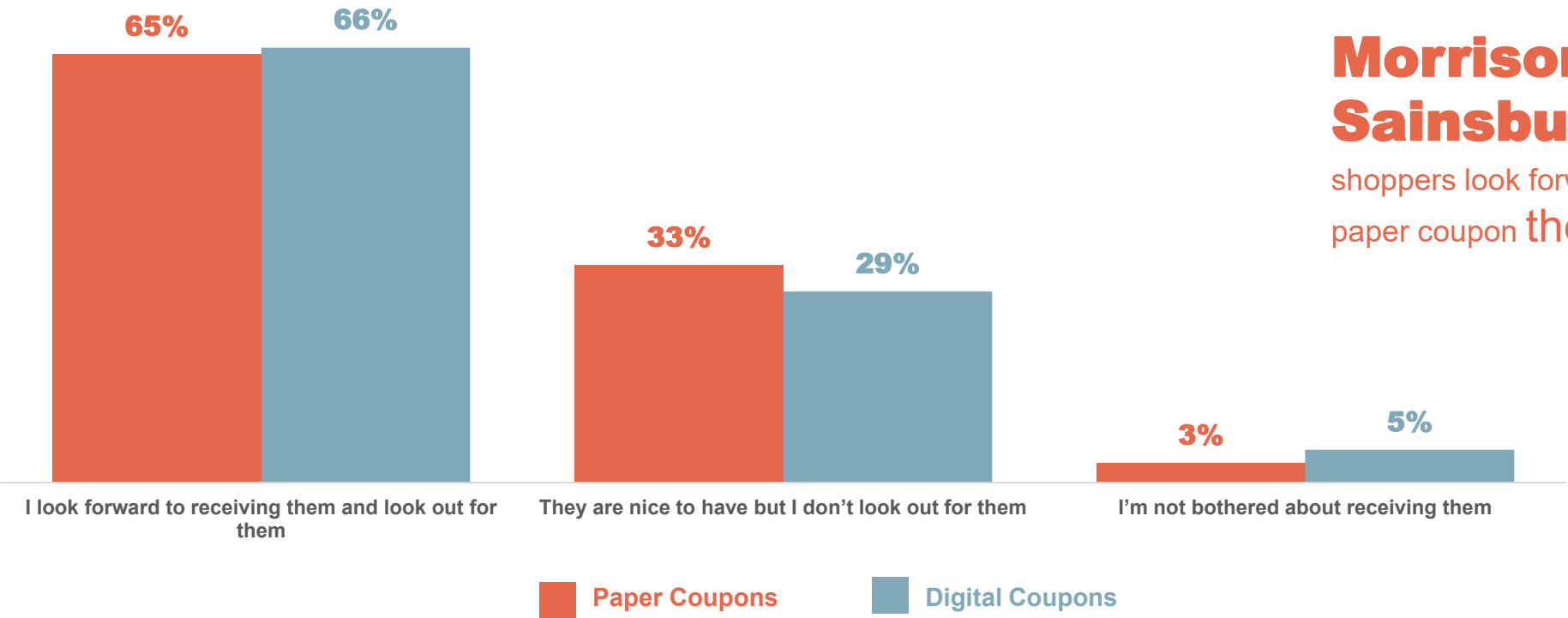


Shoppers at all supermarkets who shop online are open to receiving **more digital coupons**



Most preferring both types of coupon actively **look forward to receiving coupons** and look out for them.

Whether those who prefer each type of coupon look forward to receiving them:

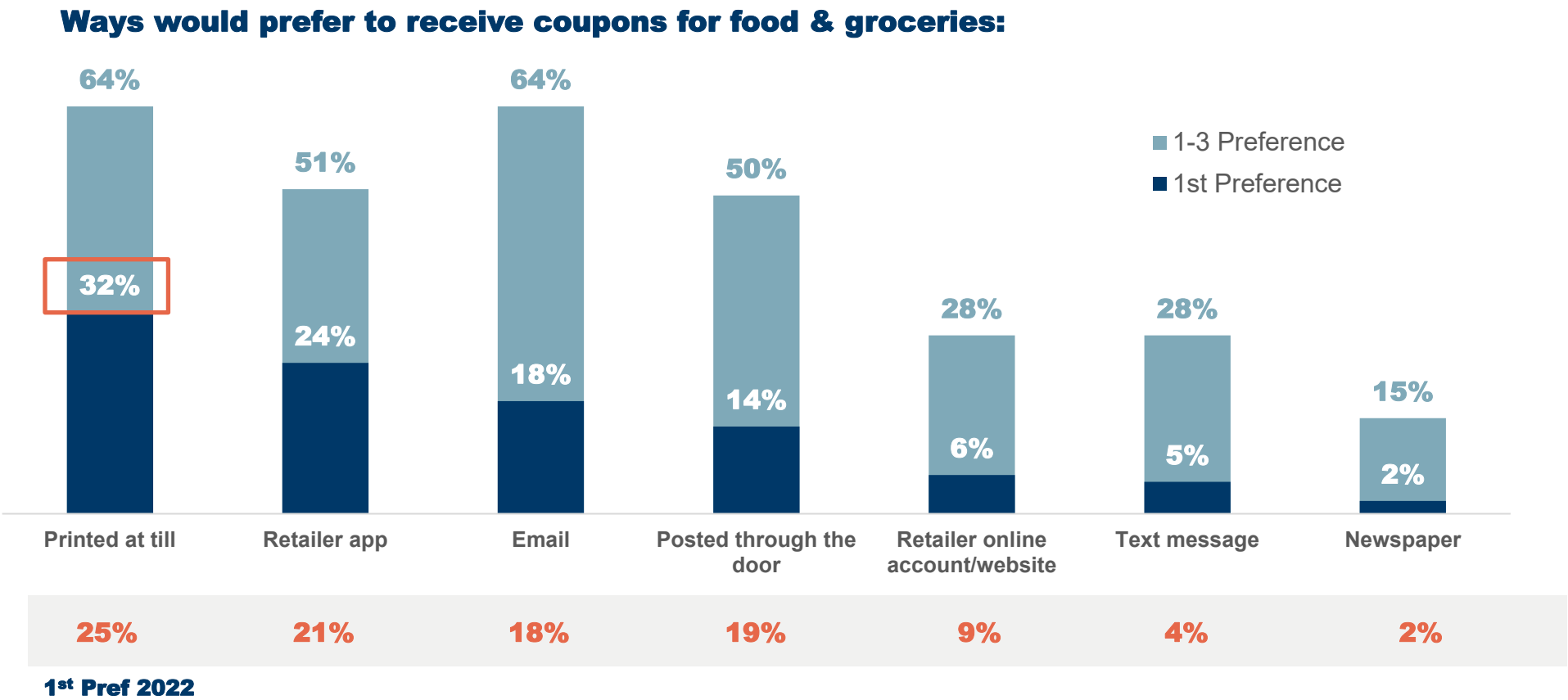


Morrisons (73%) and Sainsbury's (71%) shoppers look forward to receiving their paper coupon the most

Shoppers' 1st preference is to have their coupons printed at the till and this has increased since 2022 (from 25% to 32%)

Shoppers are open to receiving **coupons via email** although there's a greater first preference for **coupons printed at till**. Are shoppers beginning to become over-whelmed by digital?

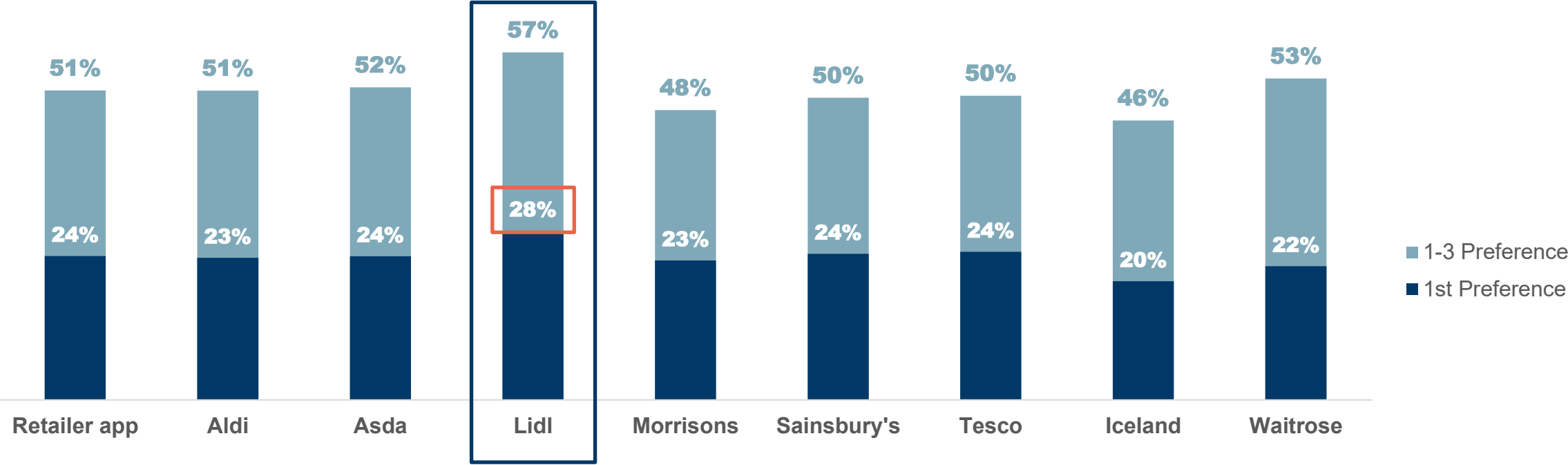
Strong 1st Preference for coupons printed at till among **Sainsbury's main shoppers**



MAIN SHOPPERS AT:	
Sainsbury's	42%
Aldi	38%
Iceland	31%
Tesco	29%
Asda	27%
Morrisons	26%
Lidl	26%

Lidl shoppers are the most keen to receive their coupons through the retailer app (Iceland shoppers are least open to receiving coupons via app).

Would prefer to receive coupons for food & groceries through retailer app:



Comparative Summary:

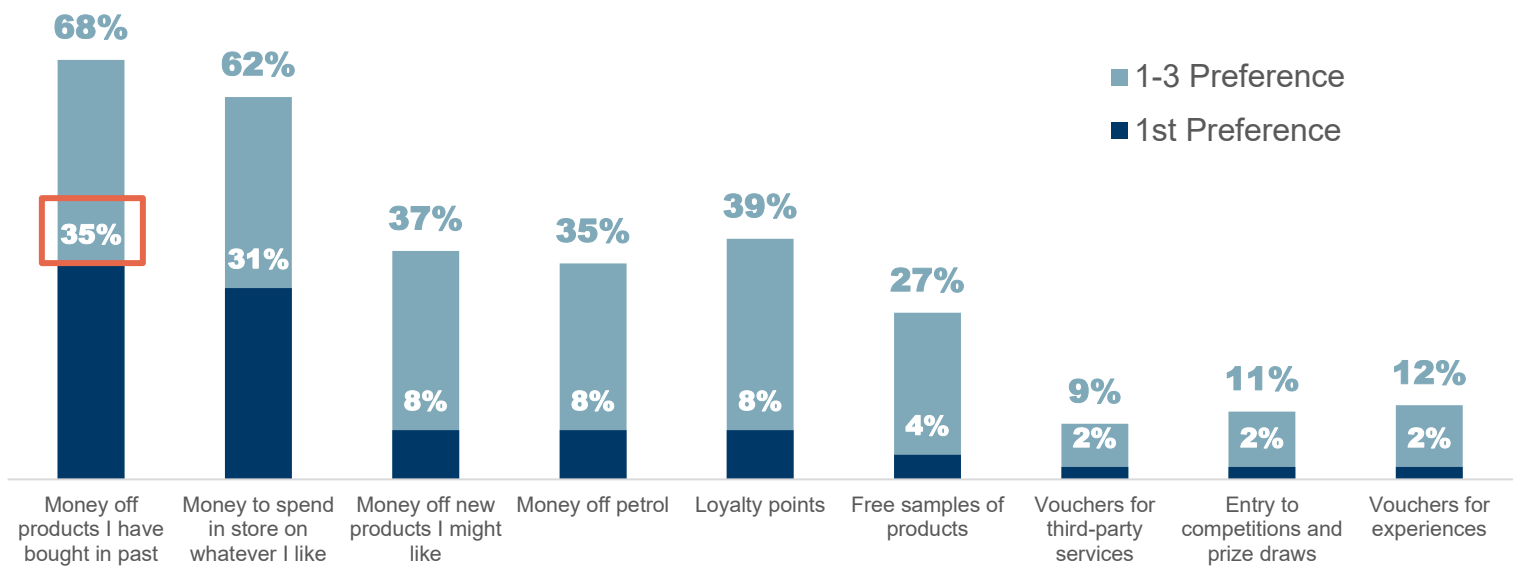
1st preference for coupons printed at till vs in retailer app, 2025 vs 2022

(Top Preference):

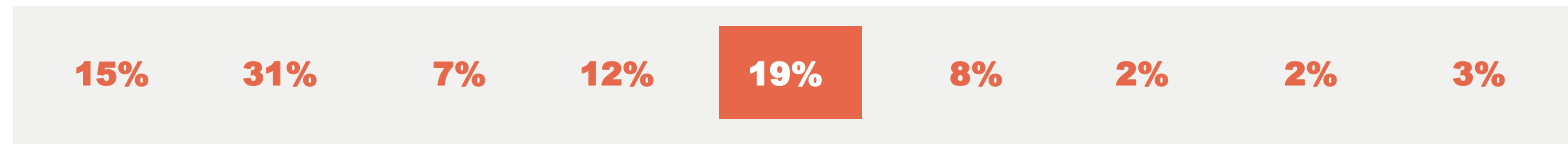
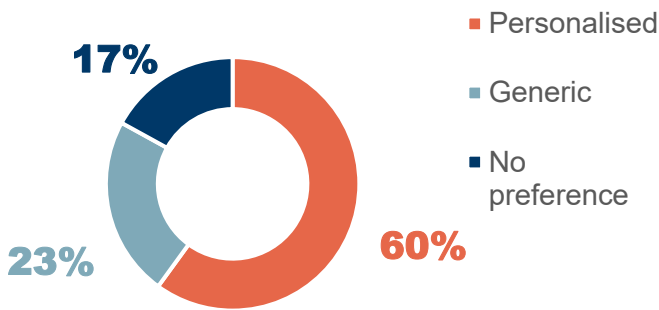
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2025	Prefer printed at till	32%	35%	29%	30%	23%	30%	41%	30%	40%	33%	29%	31%	33%
	Prefer retailer app	24%	25%	23%	23%	25%	30%	17%	23%	17%	26%	26%	24%	24%
2022	Prefer printed at till	25%	27%	24%	17%	22%	30%	36%	25%	27%	26%	25%	24%	27%
	Prefer retailer app	21%	20%	23%	26%	27%	18%	11%	20%	21%	23%	21%	21%	21%

Receiving money off previously bought products is the most preferred form of coupon (by 35%) and has increased significantly since 2022 (15%) – **reflecting strong preference for personalised coupons.**

Types of coupons would prefer to receive in future for food & groceries:



When asked directly, 60% prefer personalised coupons compared to 23% preferring generic ones



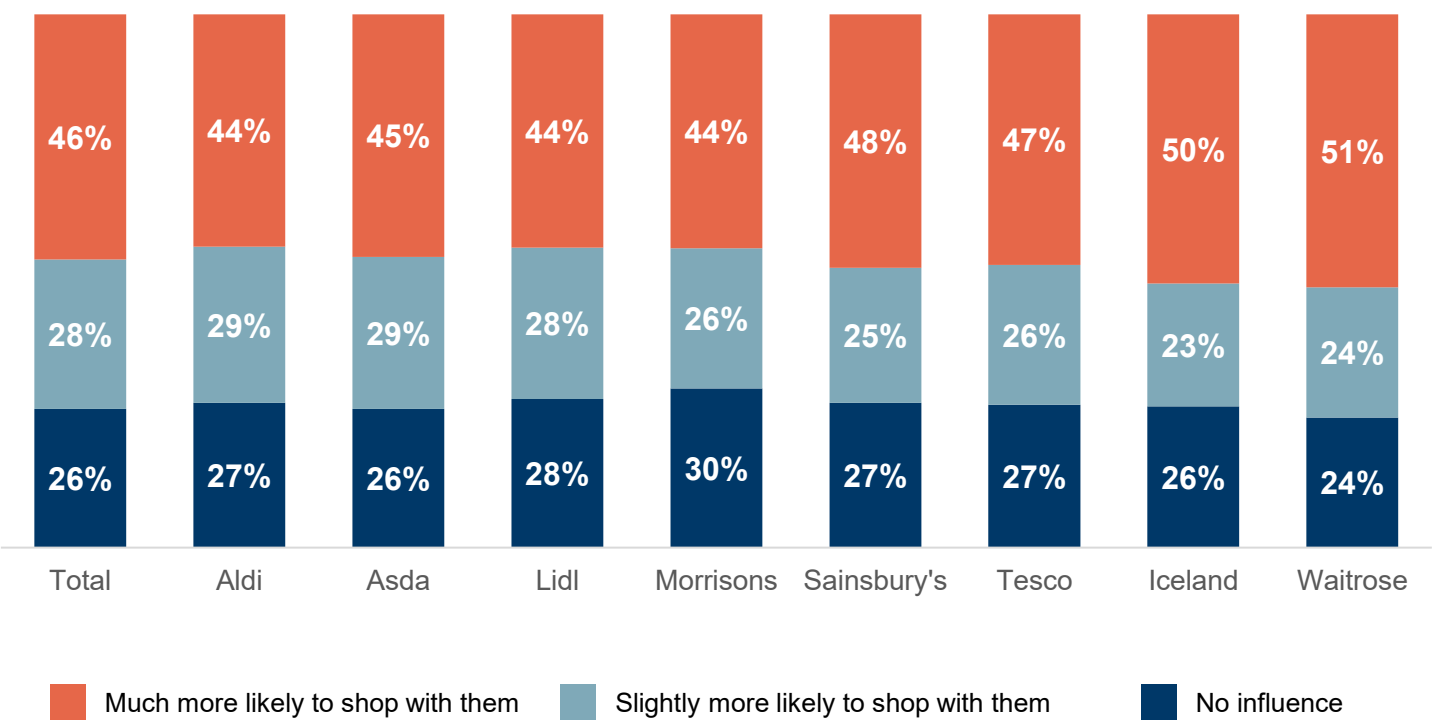
1st Pref 2022:

First preference for **loyalty points** has dropped significantly since 2022.

Do shoppers now prefer discounts they can use instantly or more immediate savings?

Three quarters of shoppers say that **personalised coupons increase the likelihood of shopping at a supermarket** and they also encourage trial of new/different products.

Extent to which personalised coupons influences decision to shop with a supermarket:



69% of shoppers also say that personalised coupons would make them **more likely to try new/different products**

Source: B2. To what extent does a supermarket offering personalised coupons or offers influence your decision to shop with them? I B3. And to what extent do personalised coupons or offers influence how likely you are to choose a different product or brand? I B3b. And which of these best describes how you feel about personalised coupons or offers? Base: All respondents (1000), Shoppers: Aldi (461), Asda (431), Lidl (391), Morrisons (335), Sainsbury's (486), Tesco (664), Iceland (317), Waitrose (168)



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