

THE **CRISIS**, THE PANIC, THE SHOCK -- **IT'S OVER**
NEW **SHOPPING HABITS** HAVE EMERGED. **FAST.**

SOME HABITS WILL **STICK.**
OTHERS WILL **DISAPPEAR.**

THERE ARE **NEW RULES** TO FOLLOW.
BUT **NO RULES** TO BREAK.

REBOOT

HOW AMERICA SHOPS[®]

YOUR SITEMAP TO THE NEW SHOPPING WORLD

9 **QUESTIONS** (AT LEAST) YOU NEED
TO ANSWER TO SURVIVE & THRIVE
IN THIS NEW SHOPPING LIFE.



BEGINS HERE →

it happened so fast...

JANUARY - SEPTEMBER '08 >> *frugal was already normal.*

OCTOBER '08 >> *panic mode!!!!. the affluent join in.*

APRIL '09 >> *reason returns... a bit. fear lingers.*

AUGUST '09 >> *signs of a new shopping life emerge.*

9

QUESTIONS (AND MORE) YOU NEED TO ANSWER

WE ANSWER THEM FOR YOU.

1. WHAT WILL STICK?

[How ingrained is the frugal mindset? Ask Mum. She's tired of doing it all herself.]

2. WHAT GOES AWAY?

[During the Crisis, 1/3 of shoppers were relieved not to be shopping as much any more.]

3. WHICH CHANNELS WILL COME BACK? WHICH WON'T?

[Are channels even relevant any more?]

4. WILL DISCOUNTERS HOLD ONTO AFFLUENT SHOPPERS?

[Will Walmart keep them in the store? Will Target get them back?]

5. IS SPECIALTY RETAIL DEAD?

[What is worth making an extra trip and paying a little more?]

6. WHICH CATEGORIES ARE VICTIMS OF THE CRISIS?

[What's off the shopping list for good? Which categories are shoppers OK to spend less on?]

7. WHERE DO BRANDS MATTER? WHERE NOT?

[Was private label growth a temporary remedy? An aberration? Or is it a long-term winner?]

8. WHAT ARE THE DEMOGRAPHICS OF THE COMEBACK?

[Will those who have been on an austerity binge longest – lower and middle income – come back first? Have the affluent found a better way?]

9. IS SAVING MONEY THE NEWEST RETAIL COMPETITOR?

[Americans are becoming savers. That's money no longer spent in store.]



BEGINS HERE



METHODOLOGY

Internet survey; conducted **JULY '09**.
Nationwide sample of 1500 adults

21 CHANNELS:

Catalog
Convenience Store
Department Store
Discount/Off-Price Clothing Store
Dollar Store
Drug Store
E-mobile
Home Improvement Store
Internet
Mass Merchandiser/Supercenter
Mall
- Enclosed
- Strip
Specialty Store
- Beauty
- Clothing
- Home Furnishings
- Pet Supplies
- Other
Supermarket
- Full Line
- Limited Assortment
TV Shopping
Warehouse Club


50 LEADING INDICATOR CATEGORIES:

Adult Incontinence	Home Furnishing
Baby Personal Care	Home Service
Baking Ingredients	Ice Cream/Yogurt
Body Moisturizers	Household Cleaning Products
Baby Diapers	Kitchen Small Appliances
Breakfast Cereal	Lingerie
Bras/Panties	Liquor
Bottled Water	Magazines
Cake/Crackers/Dessert	Over-The-Counter Medication
Candy	Oral Care
Cell Phone Service	Outdoor Furniture
Clothing	Packaged Convenience Foods
Coffee	Paper Goods
Computers/Software	Pet Supplies
Cosmetics	Premium Cable TV Service
Eating At Restaurants	Prescription Medication
Electronics	Salon Services
Entertainment	Salt Snacks
Fashion Accessories	Skin Care Products
Fragrance	Sleepwear/ Loungewear
Frozen Food	Take-out Foods
Greeting Cards	Toys and Games
Hair Care Products	Vacations
Home Décor	Vitamins/Nutritional Supplements
Home Fragrance/Candles	Wine

ANALYTICAL PLAN

The report will include data tables as follows,
with trending comparisons as appropriate (2005 – 2009):

Total
Men and Women
Age Groups under 35, 35-54, 55+
Income: under \$50K, \$50-\$100K, \$100K+
Ethnic Origin: Caucasian, Hispanic, African-American



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