



# Identifying the Changing Shopper in Challenging Economic Conditions

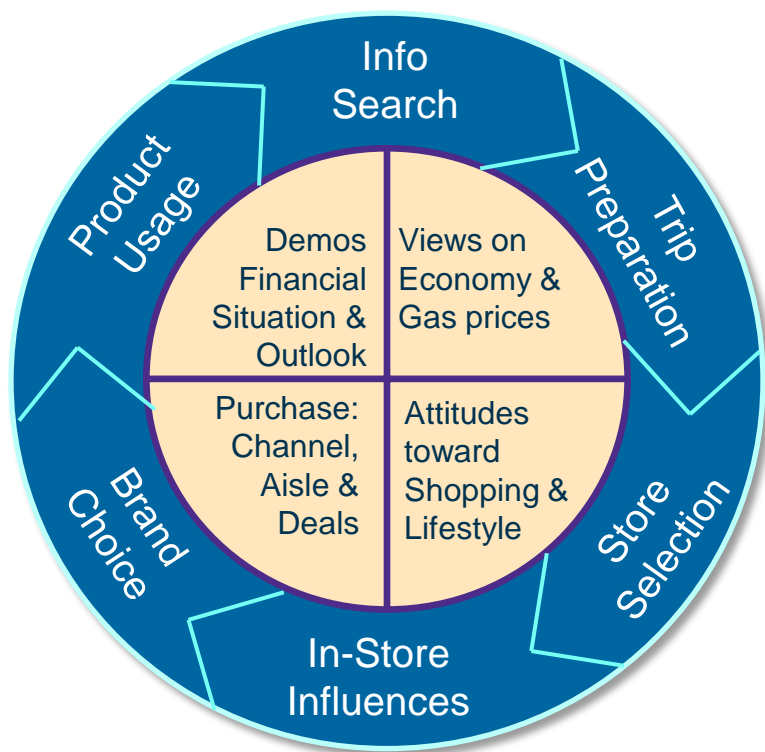
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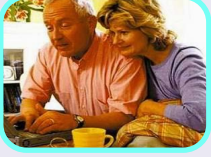




  
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# Six Unique Shopper Segments Have Varying Degrees of Economic Impact



# The U.S. Shopping Segments

Segments	Promotion & Store Influences	Product Development
 <p><b>Downtrodden</b></p> <ul style="list-style-type: none"> <li>Size: 17.8%</li> <li>Median Age: 48</li> <li>Median Income: \$41K</li> <li>Bleak outlook</li> </ul>	<ul style="list-style-type: none"> <li>Skew to Walmart, Dollar, C-Store &amp; Supercenter</li> <li>Collect coupons from newspapers and online</li> <li>Like loyalty card discounts, store signs, displays</li> <li>Use store kiosks, touch screen digital signs</li> <li>Buy most private labels for EDLP</li> </ul>	<ul style="list-style-type: none"> <li>Visit manufacturers' web for info and deals</li> <li>Try new brands for low price</li> <li>Look for products that last longer</li> <li>Prefer products that serve multi-usages.</li> <li>Prefer package types that allow family share</li> </ul>
 <p><b>Cautious&amp; Worried</b></p> <ul style="list-style-type: none"> <li>Size: 24.8%</li> <li>Median Age: 55</li> <li>Median Income: \$47K</li> <li>Bleak outlook</li> </ul>	<ul style="list-style-type: none"> <li>Skew to Walmart, Dollar, C-Store &amp; Club</li> <li>Don't actively collect coupons</li> <li>Don't pay much attention to in-store circulars, signs or displays.</li> <li>Price sensitive.</li> </ul>	<ul style="list-style-type: none"> <li>Try new brands for low price</li> <li>Look for products that last longer</li> </ul>
 <p><b>Start-Ups</b></p> <ul style="list-style-type: none"> <li>Size: 10.6%</li> <li>Median Age: 36</li> <li>Median Income: \$47K</li> <li>Hurt but see bright future</li> </ul>	<ul style="list-style-type: none"> <li>Skew to Grocery, Drug and Mass stores</li> <li>Search info and purchase online</li> <li>Collect coupons from newspapers and online</li> <li>Like loyalty card discounts, store signs, displays</li> <li>Use store kiosks, touch screen digital signs</li> </ul>	<ul style="list-style-type: none"> <li>Visit manufacturers' web for info and deals</li> <li>Try new brands. Like products that last longer</li> <li>Prefer package types that allow family share</li> <li>Reachable by social network, TV and radio ads and iPhone.</li> </ul>
 <p><b>Optimistics</b></p> <ul style="list-style-type: none"> <li>Size: 14.3%</li> <li>Median Age: 40</li> <li>Median Income: \$64K</li> <li>Financially hurt a bit</li> </ul>	<ul style="list-style-type: none"> <li>Skew to Walmart &amp; Supercenter</li> <li>Search info and download coupons online</li> <li>Like loyalty card discounts, store signs, displays</li> <li>Price sensitive. Buy private labels for EDLP</li> </ul>	<ul style="list-style-type: none"> <li>Visit manufacturers' web for info and deals</li> <li>Prefer package types that allow family share</li> <li>Reachable by TV and radio ads and iPhone</li> </ul>
 <p><b>Carefree</b></p> <ul style="list-style-type: none"> <li>Size: 18.6%</li> <li>Median Age: 53</li> <li>Median Income: \$67K</li> <li>Financially Stable</li> </ul>	<ul style="list-style-type: none"> <li>Skew to Club store</li> <li>Not engaged in collecting coupons</li> <li>Least price sensitive</li> <li>Buy on trust of brands</li> </ul>	<ul style="list-style-type: none"> <li>Most brand loyal</li> </ul>
 <p><b>Savvy Shoppers</b></p> <ul style="list-style-type: none"> <li>Size: 13.8%</li> <li>Median Age: 51</li> <li>Median Income: \$76K</li> <li>Financial improved</li> </ul>	<ul style="list-style-type: none"> <li>Skew to Grocery, Drug and Mass stores</li> <li>Enjoy shopping and quest for value.</li> <li>Use a lot of coupons and store circulars</li> <li>Like loyalty card discounts, store signs, displays</li> <li>Buy on trust of brands</li> </ul>	<ul style="list-style-type: none"> <li>Read product labels</li> <li>Research products on blogs</li> </ul>