

The 2010 American Pantry Study: The New Rules of the Shopping Game



July 2010

Shopper Segmentation



Spectators

- Least impacted by recession, least likely to have changed shopping practices.
- Feelings of resourcefulness have grown, even though need to be resourceful has not.
- Youngest segment, highest income, most educated.

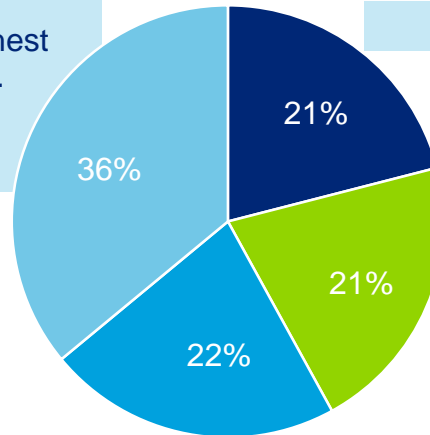
A WELL-BALANCED, opportunistic take on Resourcefulness



Super Savers

- Deliberate and concentrated effort to increase use of coupons and multiple store shopping.
- Sense of empowerment, resourcefulness has grown significantly due to recession. Take great pleasure in saving money.
- Most female segment

Resourcefulness expressed at the CASH REGISTER



Sacrificers

- Resentful—even bitter about the compromises they have had to make.
- While they too take pride in resourcefulness, it comes at a steep emotional price: gratification management and switch to store brands prompts disappointment.
- Most likely to have taken an income hit in past two years. Lowest income.

Resourcefulness managed at the SHELF



Planners

- Have forgone the coupon/discount route to focus more on product mix to facilitate a shift from prepared to from-scratch meals/meal components.
- Reap savings by buying large pack sizes even though they are least likely to have children in household.

Resourcefulness expressed through PANTRY MANAGEMENT



Precision Shopping

An extremely thoughtful approach to engaging the marketplace that involves a checklist of tactics that consumers use to manage wastefulness, respond to family need, reduce credit dependency and save money.

% Agree

84%

I am looking closely at every spending category to see where we can save

79%

I feel a lot smarter now about the way I shop versus 2 years ago

65%

Even though I am spending less on products now, it doesn't feel like I'm sacrificing that much

44%

I can't believe how wasteful I used to be in how I shopped

Resourceful Shopper

The resourceful shopper views the shopping process from a strategic perspective using their ability to mix coupons, multiple channels, discounts and store competition to maximize the benefit to the family and the shopper's gratification with the results.

Shopper Loyalty Cards

(% Agree)

81%

It's fun to see how much money I can save by using coupons or my shopper loyalty card

65%

Shopper loyalty cards are an "essential/very important" money saving method

Coupon Usage Changes Made Due to Recession

(% Agree)

45%

Using more coupons you get in the mail

43%

Reading/clipping more coupons from the newspaper

43%

Using more coupons you get in the store

39%

Downloading and printing online coupons

67%

Use at least one of these four coupon practices

Emerging Consumer Sentiments

	I am more... (%)	I am less... (%)
Price conscious	61	2
Responsible	44	2
Smart	42	2
Planned	42	4
Frugal	42	8
Buying to please myself	15	23
New product focused	11	24
Brand loyal	7	31
Trendy	5	31
Spontaneous	9	35
Impulsive	6	43

% Agree

75%

Going through these economic times has caused me to realize which brands I really care about and which ones are less important to me

65%

Eating at home more often because of the recession

Store Brands

% Agree

80%

I believe that most store brands are manufactured by the traditional national brands

74%

I am more open to trying private labeled store brands products than I was two years ago

51%

There are only 2 or 3 brands I can't live without

48%

I perceive traditional national branded products to be superior in quality to store brands (private label)

35%

I intend to purchase more national brands instead of store brands as the economy improves

32%

I often feel that I am sacrificing when I purchase a store brand instead of a national brand

Demographics

Sample Demographics*

Age		Gender		Income	
21 to 29	17	% Male	38	Under \$25,000	17
30 to 44	37	% Female	62	\$25,000 to \$49,999	30
45 to 59	33	Marital Status		\$50,000 to \$74,999	23
60 to 70	13	Married/Living together	63	\$75,000 to \$99,999	15
		Single, Never Married	22	\$100,000 or more	15
Ethnicity		Divorced/Separated/ Widowed	15	Employment Status	
White or Caucasian	72	Children in Household		Work Full-Time	45
Black or African American	13	Yes	43	Work Part-Time	12
Hispanic	9	No	57	Not Employed	43
Other	6	Household size		Education	
Region		1	19	High School or Less	18
Northeast	19	2	33	Some College	33
Midwest	23	3	20	College Graduate	27
South	36	4+	28	Graduate Degree	12
West	22				

*Subjects were qualified as primary or shared decision-makers. Data collected online. n=2,077 household shoppers and food preparers , Projectable to U.S. population, Segmentation of shoppers based on attitudes and practices, Fielded April, 2010 , 2% error among total sample, weighted on gender to a 62/38 mix of women and men

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