Are MEN from Mars & WOMEN from aisle 3?

A collaborative research project constructed and commissioned by Miller Zell, Inc. in partnership with the National Research Network as part of the 2009 National Retail Federation Conference

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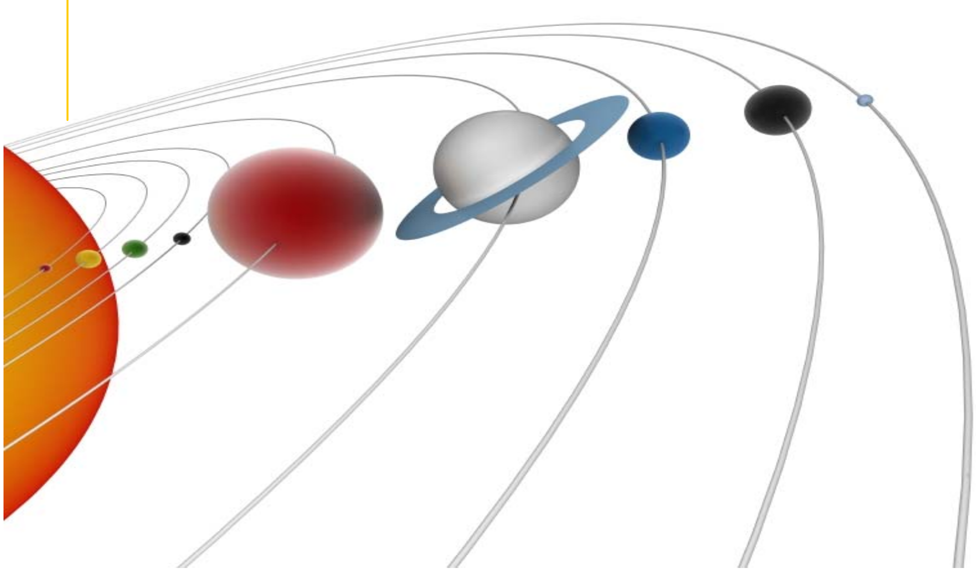
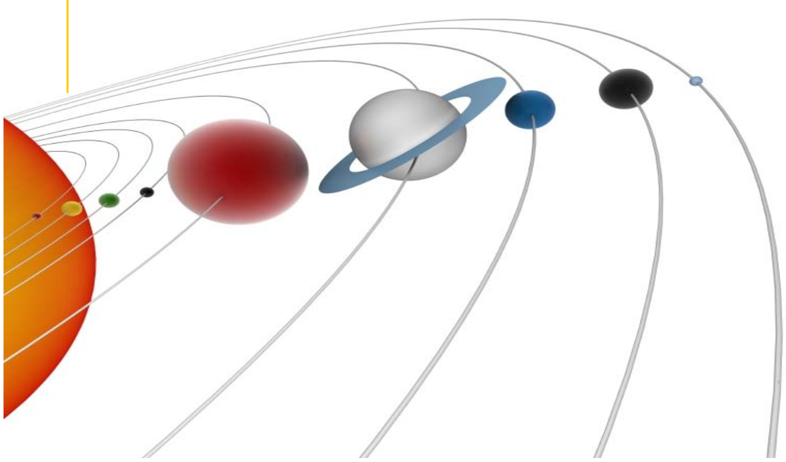


Content



Overview

In 2008 the American economy was buffeted by economic headwinds the likes of which have not been experienced since the 1930s according to many economists. To understand the impact on the American shopper, Miller Zell undertook the execution of a shopper behavior survey to look at how current economic conditions are impacting the shopping behaviors of men compared with women. The survey also sought to understand how shoppers felt their buying behaviors would change in the next six months.

We've long known that men and women shop differently; our objective was to understand how these differences are manifested in challenging economic conditions. The results of this survey will provide insight for retailers who understand the need for change during this economic downturn. It will also provide actionable insight for store designers, buyers and store visual merchants to help them better influence shopper decision-making.

Survival in retail will be directly related to the ability to understand, precisely, the shoppers state of mind, deliver solutions that serve their interests and effectively execute shopper marketing programs.

Key Insights

- The general trend across age, gender and income was to reduce spending, trade down and brand switch to private label product.
- Females were far more likely than males to be more cautious about economic conditions, trade down products and shopping locations (e.g. national brand to private label brand or premium retailer to discount retailer) and reduce overall home expenditures than males.
- The survey indicated that females are driving tighter fiscal discipline in the household including the reduction of family night out.
- Unexpectedly, wage earners exceeding $100K were far more negative about the economy than all other wage earning categories.
- Pre-planning is way up. This, coupled with big increases in internet research, indicates shoppers are coming to the retail store armed more than ever with knowledge of pricing, product capabilities and competitor products.
- Interestingly, all gender, age and wage categories indicated greater optimism (as represented by increased expected future spend) six months from now than currently.

Implications

As economic conditions continue to erode rapidly, it is important that retailers and manufacturers continue to have their finger on the pulse of changing shopper behavior. Our survey identified unexpected divergence in shopping behavior by gender and wage as well as expected divergence based on age.

Retailers and manufacturers will have to improve in-store and mass media communications related to their value proposition. These initiatives will especially need to target females and higher income wage earners. Integration of in-store and out-of-store messaging will hold great importance for how retailers and manufacturers build brand image, drive demand and convert shoppers to buyers. Increased shopper pre-planning and research will require marketers to provide enhanced product information in order to avoid de-selection.

Results Summary

Questions on Experimentation

- Have you traded "down" over the past six months in any of the following categories*?

- Which of the following dining occasions** are you bringing into the home?

- Have you "brand switched" *** from a national brand to a store brand in the past six months which you would have not considered previously?

68% Staying in vs. eating out or entertainment out

½ Of grocery shoppers are moving from premium to discount retailers

87% Switched brand in grocery

5 of **10** Have brought special occasions or family nights into the home

1/3 Switched to store brand apparel

*Eating out to Eating in. Outside the Home to Inside the Home Entertainment. Premium priced Grocery to discount Grocery. Premium price Mass Merchandiser (ex: Target) to value Mass Merchandiser (ex: WalMart). Specialty Retailer to Mass Merchandiser (ex: WalMart). Mainstream Department Store (ex: Macy's) to value based Department Store (ex: JC Penney, Sears) . Premium Department Store (ex: Nordstrom) to mainstream Department Store (ex: Macy's)

** Girls night out . Guys night out . Family night. Special occasions

***Categories: Grocery . Apparel . Electronics . Furniture. Home Improvement

Results Summary

Questions on Consumption

Which of the following categories* are you currently shopping more or less?

•

Have you eliminated one or more of the following categories* from your shopping trips over the past six months?

•

Do you plan on spending more or less over the next six months in the following categories*?

50% Are spending less over all categories

61% Are spending less in electronics

62% Are spending the same or more in grocery

64% Are spending less in apparel

*Categories: Grocery . Apparel . Electronics . Furniture . Software & Gaming . Home Improvement

Results Summary

Questions on Decision Making

Are you pre-planning your shopping trips more or less today versus one year ago?

•

Are you conducting on-line research more or less today versus one year ago?

•

Are you making more or less joint purchase decisions with a partner or spouse in the following categories*?

60% Are planning more

42% Of men and **45%** of women are doing more on-line research

Joint shopping decision making **2X higher** in high ticket items, furniture, home improvement, and electronics

*Categories: Grocery . Apparel . Electronics . Furniture . Software & Gaming . Home Improvement

Miller Zell/NRN 2009 Shopper Behavioral Study

Survey Details

Objective:

To determine if the economy is impacting female & male shopping behaviors differently

Timing:

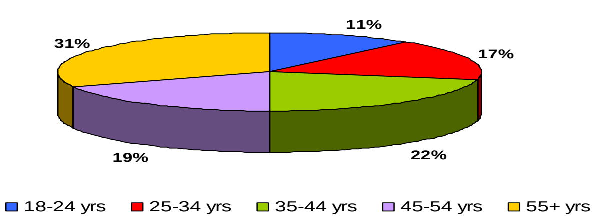
Week of December 22, 2008

Methodology:

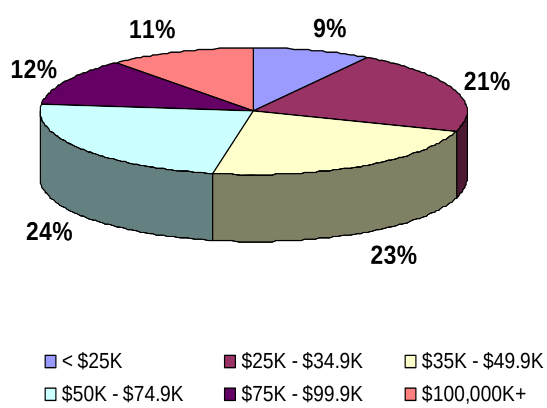
801 On-line Surveys

Respondent attributes:

52% Male, 48% Female
Average Age: 46
Average HH Income $65K



Age Distribution



Income Distribution

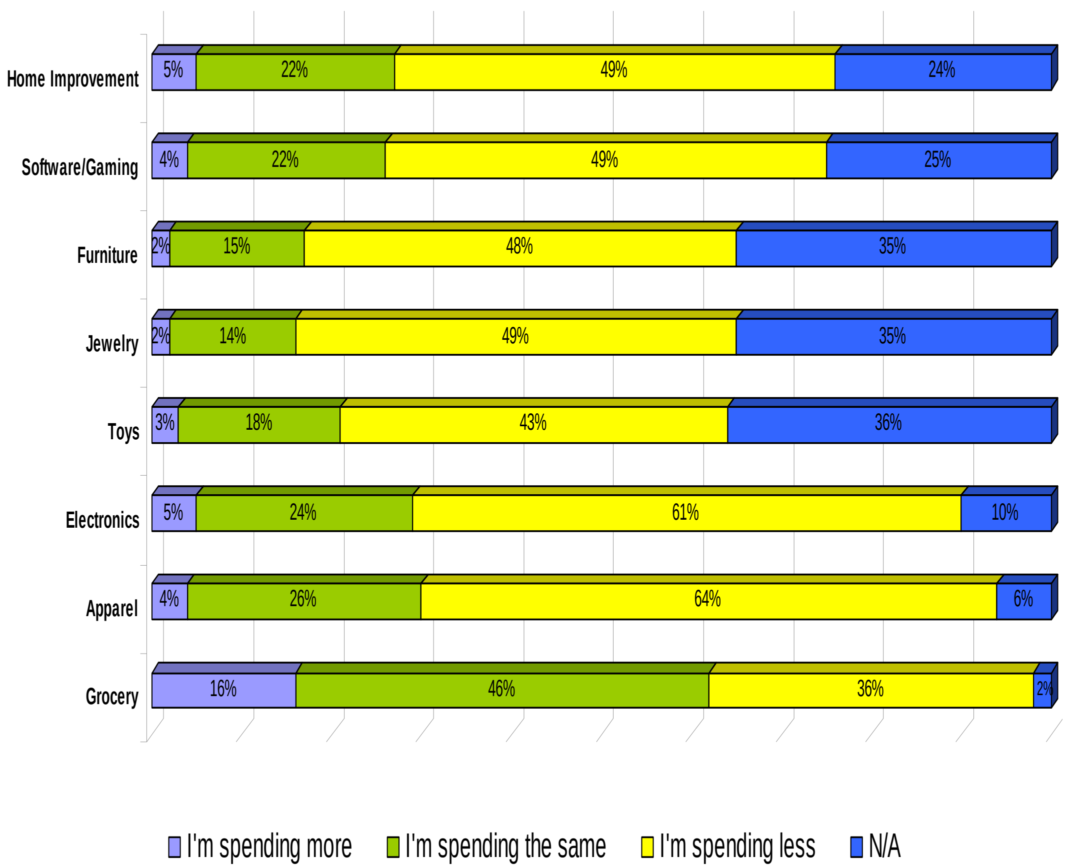
Results Details

Q1

How has your spending in the following categories changed due to the recent economic news?

Comments

In a nutshell, at least two out of five respondents are spending LESS on most categories tested except grocery, where 46% are spending the same as before, and 16% are actually spending more, which could be a sign of choosing to stay in more.



Results Details

Q1

For **GROCERY**, only respondents age 55+ were more likely than other demographic groups to say that they were spending more for groceries (21% compared to 13%-14%. No other significant changes by gender, age or income were seen.

In **APPAREL**, 18-24 year-olds and 45-54 year olds were most likely to say they were spending less (73% and 68%, respectively), compared to roughly 60% of all other age groups. No significant differences were seen in respondents based on income or gender.

With respect to **ELECTRONICS**, 28% of men said that they were spending less compared to 21% of women. 64% of women said that they were spending the same, compared to 57% of men. Results showed no significant correlations to income or age.

Demographics had no effect on **TOY** spending.

With respect to **JEWELRY**, $100,000+ respondents were the least likely to say that they were spending less (11%) compared to 14%-18% of all other income groups. Age and gender had virtually no correlation to jewelry spending. No demographic group leaps out as to spending significantly "more" or "less" on jewelry compared to other groups.

In **FURNITURE**, $100,000+ income respondents were the most likely to say they were spending "the same", while no patterns emerged for spending "more" or "less". Gender and age had no effect on furniture spending.

In **SOFTWARE/GAMING**, respondents over $75,000 said they were spending "more" (7-8%) compared to 1%-4% of all other income groups. Age and gender had no impact of spending in this category.

Demographics had no effect on **HOME IMPROVEMENT** spending.

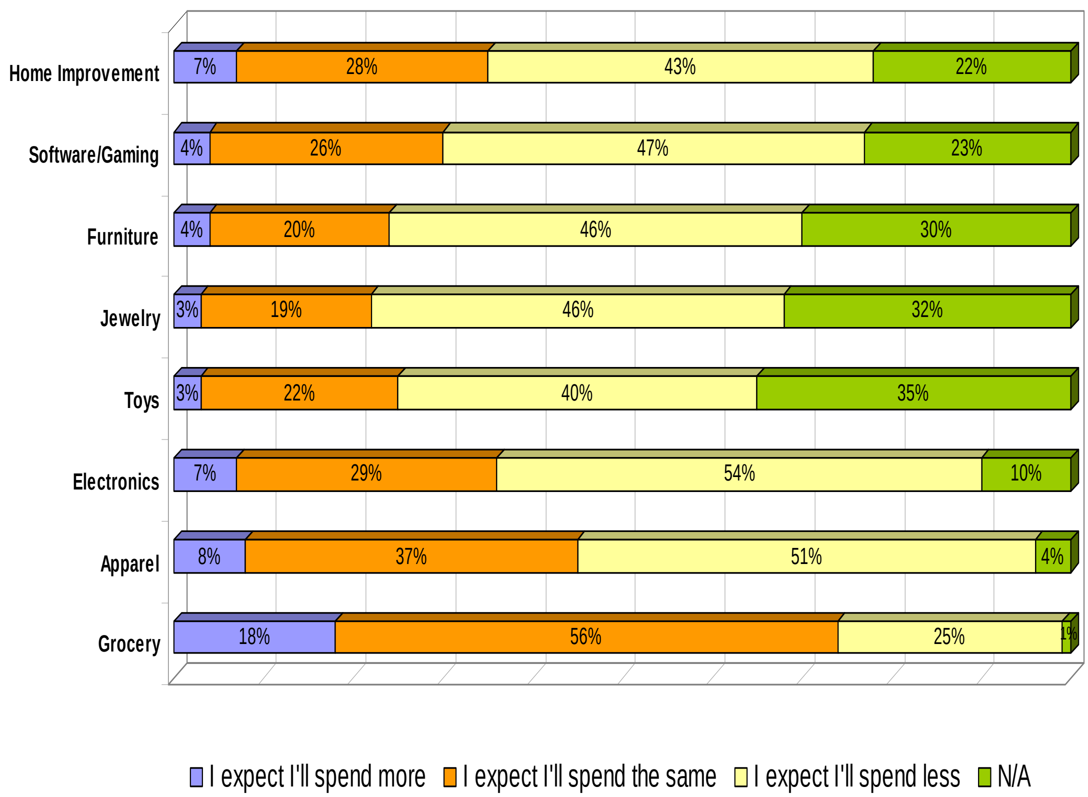
Results Details

Q2

Regarding the following categories, do you expect to spend more money or less money on each over the next 6 months, compared to 2008?

Comments

Again, the majority of respondents are expecting that they'll spend less in all categories except grocery, where 56% feel they'll spend about the same and 18% expect that they'll spend more.



Results Details

Q2

Demographics had no effect on expected future **GROCERY** spending.

All demographics exhibit virtually equal expectations with respect to spending on **APPAREL** over the next six months.

Once respondents reach an income of $50,000, their expectation of spending less on **ELECTRONICS** over the next six months increases. 57% of respondents with incomes of $50,000 - $74,999 expected to be buying less electronics in the next six months, compared to 59% of respondents with incomes of $75,000 - $99,999, and 55% of respondents with incomes over $100,000. Roughly half of all respondents with incomes of less than $50,000 expect to buy less electronics in the next six months. Gender and age had no impact on expected electronics purchases.

All demographics exhibit virtually equal expectations with respect to spending on **TOYS** over the next six months.

Respondents with incomes of more than $50,000 were the most likely to state that they expected to spend less money on **JEWELRY** than other income groups. 50% of this income group plans on spending less in the next six months, compared to roughly 42% of those with incomes of under $50,000. Gender and age have no effect on expected future jewelry purchases.

Demographics had no effect on **FURNITURE** spending.

Respondents age 45 or older are the most likely to expect to think they'll buy less **SOFTWARE/GAMING** than those under age 45. 50% of respondents over age expect to buy less software/gaming, compared to 43% of those under age 45. No real correlations can be based on gender or income.

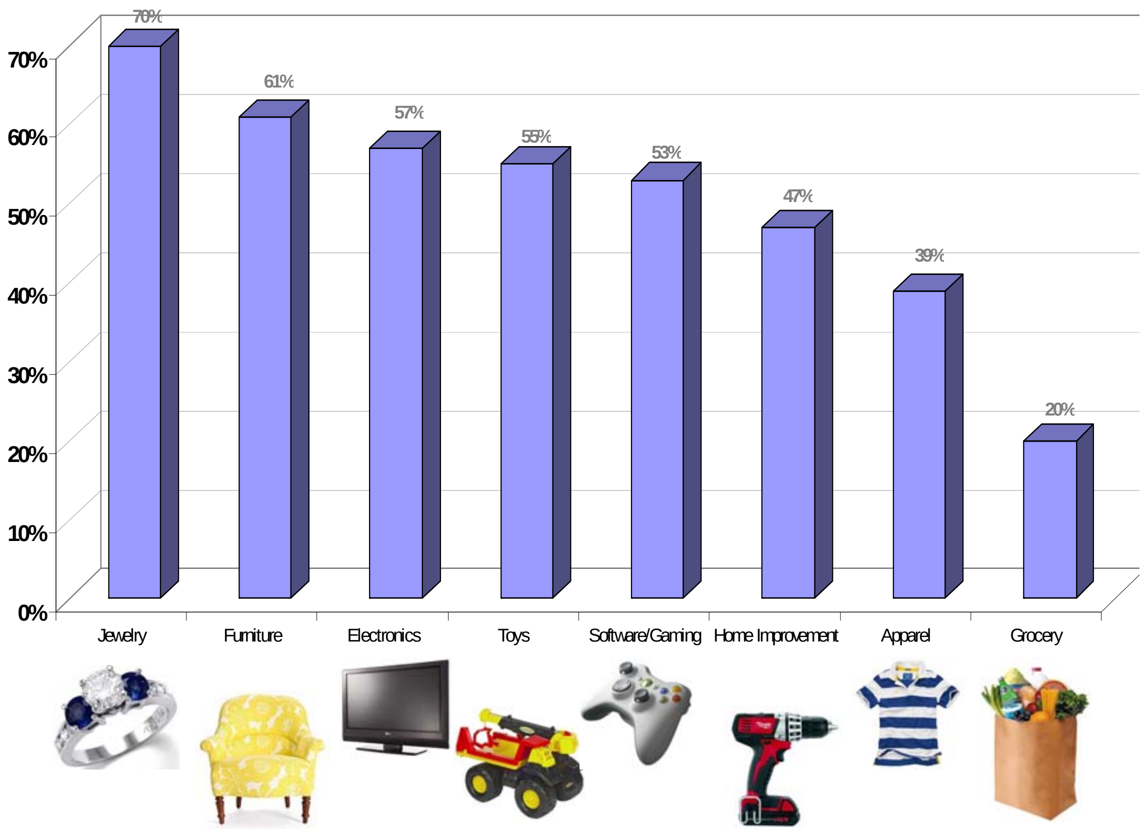
Results Details

Q3

Have you eliminated or do you think you will eliminate goods from any of the following categories from your shopping trips over the next six months?

Comments

Respondents definitely feel that they'll be spending less on anything discretionary in the next 6 months.



Results Details

Q3

When profiling each category's respondents, age plays no factor in assessing cutbacks in any category.

APPAREL has a higher incidence of middle income ($50,000 - $74,999) respondents saying that they'll be cutting back than the total sample.

Respondents that say they'll be cutting back in **GROCERY** have a higher incidence over lower income shoppers (less than $35,000) than the total sample.

As can be seen below, gender plays a factor in **JEWELRY, FURNITURE, TOYS,** and **HOME IMPROVEMENT**. In these categories, those making cutbacks comprise a higher percentage of women than the total sample (seen in bold).

Demographic breakout of those saying they will eliminate goods from each category in the next six months...									
% stating they will eliminate in parenthesis	TOTAL SAMPLE (n=801)	Jewelry (70%)	Furniture (61%)	Electronics (57%)	Toys (55%)	Software/ Gaming (53%)	Home Improvement (47%)	Apparel (39%)	Grocery (20%)
MEN	52%	**46%**	**44%**	47%	**46%**	48%	**43%**	48%	51%
WOMEN	48%	**54%**	**56%**	53%	**54%**	52%	**57%**	52%	49%
18-24 yrs	11%	12%	9%	13%	11%	10%	10%	12%	13%
25-34yrs	17%	**16%**	**15%**	15%	**16%**	17%	**17%**	16%	21%
35-44yrs	22%	22%	24%	20%	22%	19%	23%	22%	19%
45-54yrs	19%	**19%**	**18%**	21%	**20%**	21%	**16%**	21%	22%
55+ yrs	31%	31%	34%	31%	31%	33%	33%	29%	24%
<$25,000	9%	8%	9%	10%	8%	9%	7%	8%	9%
$25,000 - $34,999	21%	20%	19%	20%	20%	21%	21%	23%	**26%**
$35,000 - $49,999	23%	24%	23%	25%	24%	25%	26%	20%	24%
$50,000 - $74,999	24%	24%	24%	23%	25%	22%	22%	**31%**	24%
$75,000 - $99,999	12%	12%	13%	12%	13%	13%	14%	11%	**7%**
$100,000+	11%	12%	12%	10%	10%	9%	12%	**7%**	9%

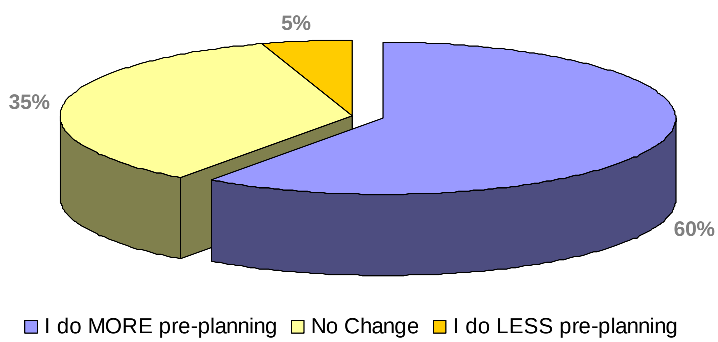
Results Details

Q4

Are you pre-planning your shopping trips more or less today than you were one year ago?

Comments

Three out of every five respondents are doing more pre-planning before shopping trips than they were a year ago.



As can be seen from the data below, age, income and gender have no real effect on shopping trip pre-planning:

	I do MORE pre-planning	No Change	I do LESS pre-planning
OVERALL	60%	35%	5%
MEN	60%	35%	5%
WOMEN	59%	36%	5%
18-24 yrs	56%	37%	7%
25-34yrs	62%	29%	9%
35-44yrs	58%	38%	4%
45-54yrs	62%	37%	1%
55+ yrs	60%	36%	4%
<$25,000	54%	38%	8%
$25,000 - $34,999	61%	37%	2%
$35,000 - $49,999	57%	38%	5%
$50,000 - $74,999	58%	38%	4%
$75,000 - $99,999	52%	43%	5%
$100,000+	60%	38%	2%

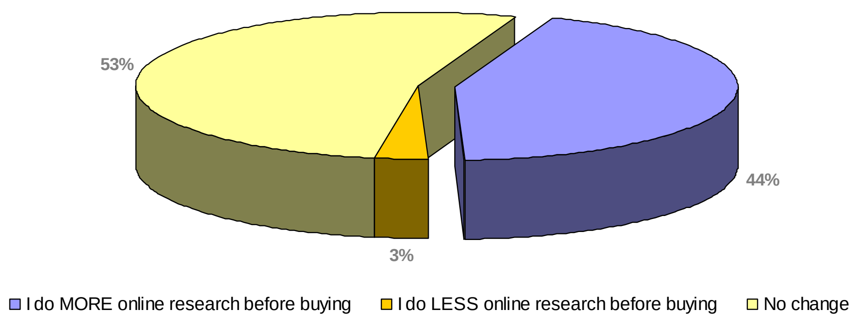
Results Details

Q5

Have you changed the amount of online research you do before making a purchase decision compared to one year ago?

Comments

44% of all respondents are doing more online research than a year ago, while an additional half of all respondents (53%) have not changed the amount of pre-purchase online research they do.



Younger respondents tend to be doing more online research than older respondents, while age and income seem to have very little effect on online research behavior.

	I do MORE online research	I do LESS online research	No Change
OVERALL	44%	3%	53%
MEN	42%	4%	54%
WOMEN	45%	4%	51%
18-24 yrs	55%	2%	43%
25-34yrs	45%	5%	50%
35-44yrs	47%	6%	47%
45-54yrs	43%	2%	55%
55+ yrs	36%	4%	60%
<$25,000	43%	2%	55%
$25,000 - $34,999	42%	5%	53%
$35,000 - $49,999	42%	5%	53%
$50,000 - $74,999	39%	4%	57%
$75,000 - $99,999	37%	5%	58%
$100,000+	44%	0%	56%

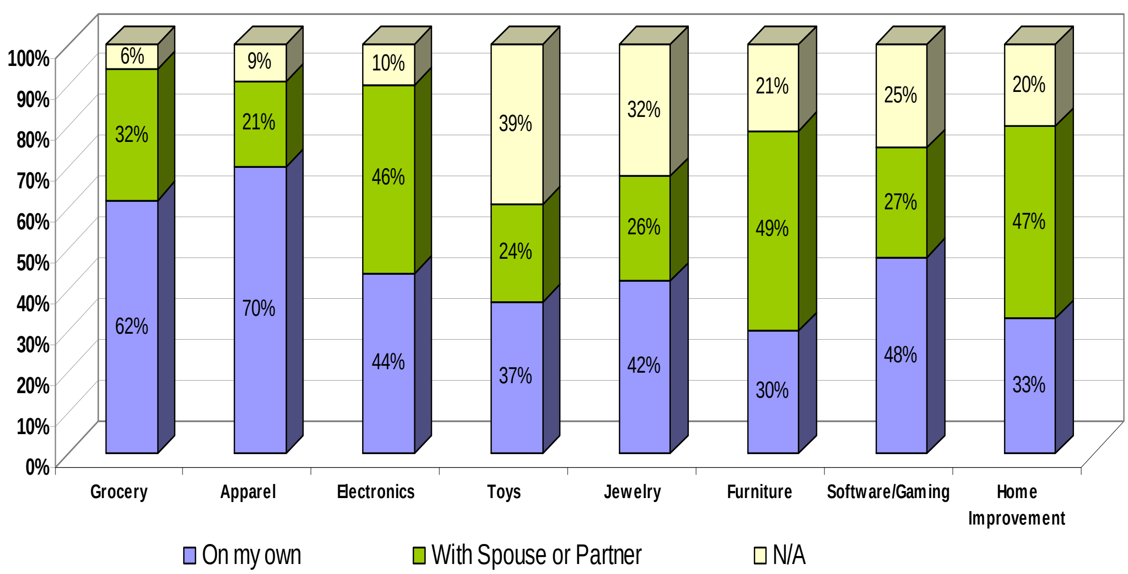
Results Details

Q6

When shopping for things in the following categories, do you normally make purchase decisions on your own or jointly with your spouse or partner?

Comments

Electronics, Home Improvement and Furniture are more likely to be joint decisions, while Grocery, Apparel, Toys, Jewelry and Software/Gaming tend to be individual decisions.



Results Details

Q6

Age and income have some effect on **GROCERY** spending: Respondents under age 24 and over age 45 have a higher incidence of making grocery decisions on their own (probably due to life stage), as do respondents with incomes of more than $75,000.

Women are much more likely than men (75% vs. 65%) to make **APPAREL** decisions on their own. The same holds true for $100,000+ income respondents, with 78% saying that they make apparel decisions on their own, compared to 70%-75% of all other income levels. Age has a negligible effect on apparel decision making behaviors.

With respect to **ELECTRONICS**, age, income and gender play no clear role in defining whether purchases are made individually or with a partner.

40% of women said they make purchase decisions about **TOYS** individually, compared to 33% of men. Age and income play no role in toy purchase behavior.

Surprisingly, gender plays no role in **JEWELRY** purchase decisions, nor does age or income.

For **FURNITURE** purchases, respondents over age 55 and under age 24 have a higher likelihood than other age groups to make purchase decisions on their own, again probably due to life stage. 56% of respondents with incomes of more than $50,000 report that furniture decisions are made as a team, compared to 47% of respondents with incomes of less than $50,000. Gender plays little role in individual or team purchase decisions in this category.

No clear patterns emerge as to whether age, income or gender play a role in **SOFTWARE/GAMING** purchase decisions.

With respect to **HOME IMPROVEMENTS**, demographics follow the "overall", with no significant variations in age, income, or gender among respondents.

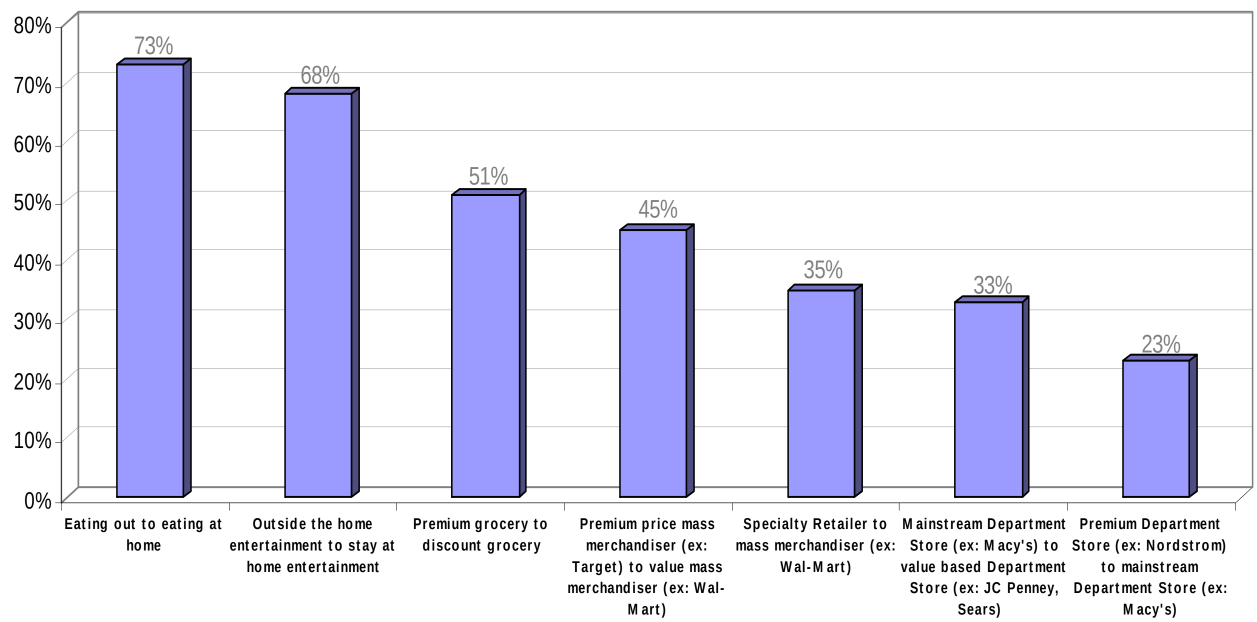
Results Details

Q7

Have you “traded down” in your shopping and entertaining habits in any of the following ways over the previous six months?

Comments

At least half of respondents are downgrading grocery, and are “insourcing” out of home dining and out of home entertainment compared to six months ago.

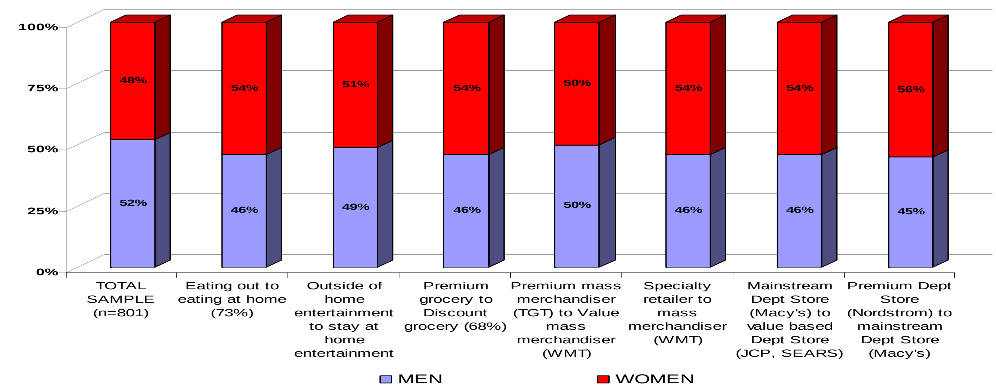


Results Details

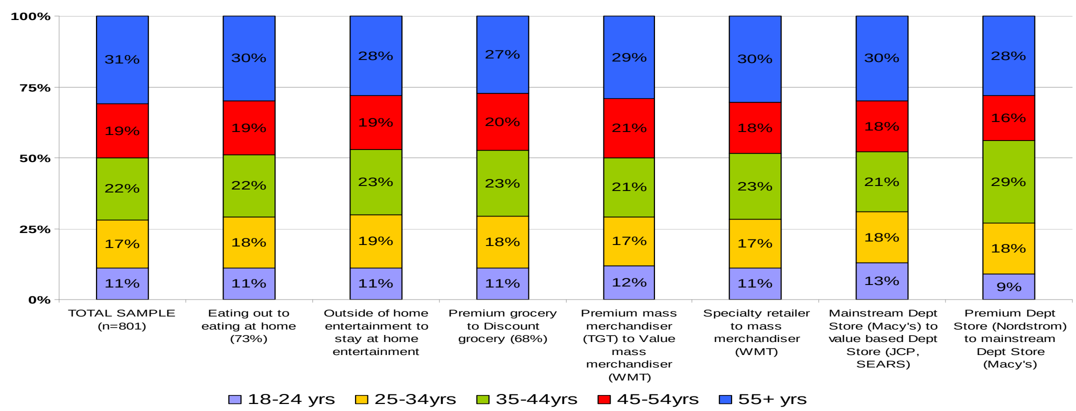
Q7

When profiling “downgraders” age and income had very little variance from the “overall”, while women had a higher likelihood to be part of “downgraders” specifically in eating at home, downgrading grocery and department stores, and going from specialty retailers to “value” mass merchants.

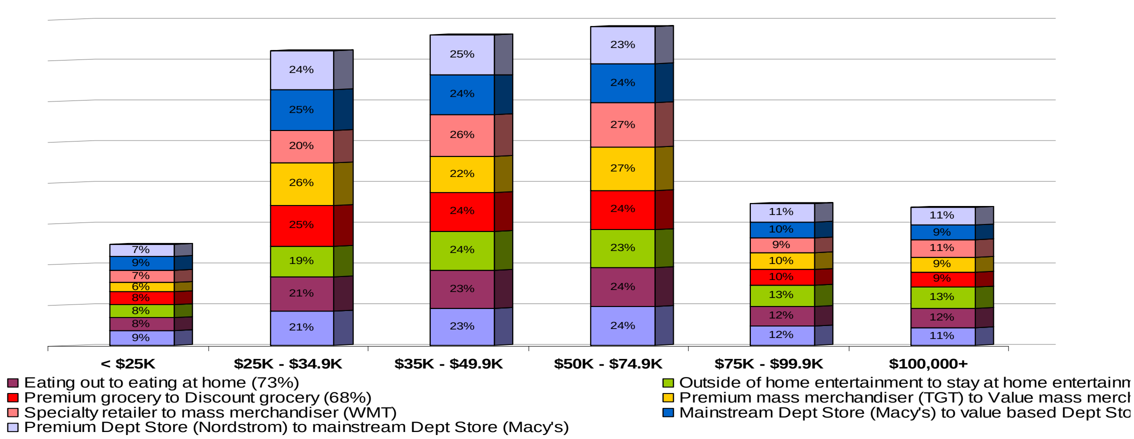
Gender



Age



Income



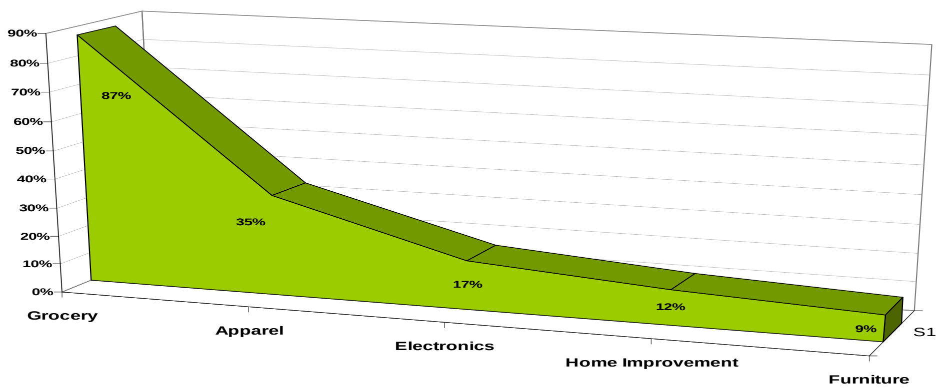
Results Details

Q8

Among the following categories, have you "brand switched" in the last six months, going from a national brand to a store brand?

Comments

Nearly nine out of every ten respondents reported "brand switching" within Grocery in the last six months, with another one-third reporting that they have "brand switched" in Apparel.



As can be seen in the table below, the profile of "brand switchers" for Grocery, Apparel, and Electronics closely matches the entire sample of respondents. However, the profile for those that "brand switched' for Home Improvements is more female than average, and encompasses a larger percentage of respondents between the income ranges of $25,000 - $50,000, and interestingly enough, those with incomes over $100,000. The profile of Furniture "brand switchers" is also significantly more female than the overall sample.

Demographic profile of those saying they have "brand switched" in the last six months...

% stating they have "traded down in the last six months	TOTAL SAMPLE (n=801)	Grocery (87%)	Apparel (35%)	Electronics (17%)	Home Improvement (12%)	Furniture (9%)
MEN	52%	48%	49%	49%	**45%**	**39%**
WOMEN	48%	52%	51%	51%	**55%**	**61%**
18-24 yrs	11%	11%	13%	17%	5%	8%
25-34yrs	17%	17%	12%	13%	24%	14%
35-44yrs	22%	22%	23%	22%	23%	25%
45-54yrs	19%	20%	22%	19%	18%	20%
55+ yrs	31%	29%	30%	30%	31%	33%
<$25,000	9%	8%	5%	4%	9%	8%
$25,000 - $34,999	21%	23%	21%	24%	**30%**	29%
$35,000 - $49,999	23%	23%	24%	25%	**13%**	24%
$50,000 - $74,999	24%	26%	28%	25%	20%	18%
$75,000 - $99,999	12%	9%	13%	10%	9%	11%
$100,000+	11%	11%	8%	12%	**20%**	11%

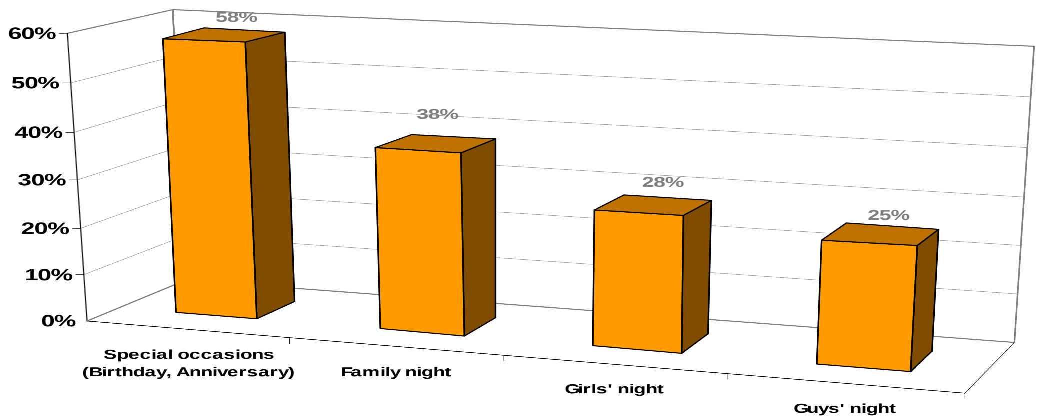
Results Details

Q9

Which, if any, of the following occasions are you no longer celebrating by going out to a restaurant but are instead bringing into the home?

Comments

Special occasions such as birthdays and anniversaries are the most likely to be brought into the home, followed by family night. Guy's and girl's night out are the two events least likely to be brought into the home.



*Only 62 men and 84 women celebrate "guys and girls night" respectively, and as a result cross tabs cannot be performed due to small sample sizes.

The profile of those staying in for special occasions closely matches the overall sample, while those staying in for family night is more female than the overall sample.

% stating they now stay in for the following events	TOTAL SAMPLE (n=801)	Special Occasions (58%)	Family Night (38%)
MEN	52%	48%	**46%**
WOMEN	48%	52%	**54%**
18-24 yrs	11%	13%	12%
25-34yrs	17%	16%	20%
35-44yrs	22%	21%	22%
45-54yrs	19%	20%	19%
55+ yrs	31%	29%	27%
<$25,000	9%	8%	4%
$25,000 - $34,999	21%	23%	23%
$35,000 - $49,999	23%	25%	21%
$50,000 - $74,999	24%	23%	28%
$75,000 - $99,999	12%	9%	12%
$100,000+	11%	13%	11%

Results Details

Q10

If you would like to share any other comments about ways you've changed your shopping habits in response to the current economic conditions, please do so in the space below.

Comments

For this question, roughly 100 people responded, and of those, the vast majority essentially stated "I'm cutting back and being smarter with money" in one form or another.

"This year, for Christmas, I had the children go through the big toy books from each retailer, charted out which retailer had the best price for each toy, did my shopping before Thanksgiving, and then watched the sales for the next four weeks."

"My husband has joined me in coupon and bargain shopping. Other than necessary food items, we buy little that is not on sale."

"We are traveling less. With the recent drop in gas prices it has relieved things a bit and we may drive somewhere we would not have when gas was $4.00 per gallon. We definitely eat in more and when we do go out we go to less expensive establishments."

"Almost no impulse buying."

"I have pretty much stopped shopping for extra things since the price of things have escalated. Things being bought for the kids have decreased as well."

"Did not buy Christmas gifts for adult children this year."

"One-stop shopping is the way to go now. Example, a Super Wal-Mart has everything. No need to travel all over the place."

Cross Tabulations

Q1. How has your spending in the following categories changed due to the recent economic news?

Q1	I'm spending more	I'm spending the same	I'm spending less	N/A
Grocery (OVERALL)	16%	46%	36%	2%
MEN	18%	46%	36%	2%
WOMEN	14%	46%	37%	3%
18-24 yrs	14%	45%	40%	1%
25-34yrs	14%	43%	40%	3%
35-44yrs	14%	56%	28%	2%
45-54yrs	13%	42%	41%	4%
55+ yrs	21%	43%	34%	2%
<$25,000	12%	41%	39%	8%
$25,000 - $34,999	14%	55%	31%	0%
$35,000 - $49,999	17%	42%	36%	5%
$50,000 - $74,999	16%	45%	38%	1%
$75,000 - $99,999	15%	47%	32%	6%
$100,000+	11%	48%	40%	1%

Q1	I'm spending more	I'm spending the same	I'm spending less	N/A
Apparel (OVERALL)	4%	26%	64%	6%
MEN	6%	27%	63%	4%
WOMEN	3%	26%	64%	7%
18-24 yrs	5%	19%	73%	3%
25-34yrs	2%	31%	59%	8%
35-44yrs	3%	32%	60%	5%
45-54yrs	3%	22%	68%	7%
55+ yrs	6%	25%	63%	6%
<$25,000	4%	19%	63%	14%
$25,000 - $34,999	7%	28%	61%	4%
$35,000 - $49,999	5%	27%	59%	9%
$50,000 - $74,999	2%	27%	66%	5%
$75,000 - $99,999	2%	26%	65%	7%
$100,000+	2%	29%	64%	5%

Q1	I'm spending more	I'm spending the same	I'm spending less	N/A
Electronics (OVERALL)	5%	24%	61%	10%
MEN	5%	28%	57%	10%
WOMEN	5%	21%	64%	10%
18-24 yrs	3%	24%	62%	11%
25-34yrs	4%	25%	63%	8%
35-44yrs	5%	27%	59%	9%
45-54yrs	4%	21%	64%	11%
55+ yrs	7%	23%	58%	12%
<$25,000	4%	20%	55%	21%
$25,000 - $34,999	5%	27%	61%	7%
$35,000 - $49,999	5%	27%	57%	11%
$50,000 - $74,999	2%	26%	62%	10%
$75,000 - $99,999	6%	26%	59%	9%
$100,000+	6%	21%	67%	6%

Cross Tabulations

Q1. How has your spending in the following categories changed due to the recent economic news?

	I'm spending more	I'm spending the same	I'm spending less	N/A Q1
TOYS (OVERALL)	3%	18%	43%	36%
MEN	4%	19%	41%	36%
WOMEN	3%	17%	45%	35%
18-24 yrs	2%	19%	48%	31%
25-34yrs	4%	20%	44%	32%
35-44yrs	3%	17%	44%	36%
45-54yrs	2%	19%	40%	39%
55+ yrs	4%	16%	41%	39%
<$25,000	4%	16%	29%	51%
$25,000 - $34,999	4%	17%	44%	35%
$35,000 - $49,999	5%	23%	38%	34%
$50,000 - $74,999	2%	16%	47%	35%
$75,000 - $99,999	3%	17%	42%	38%
$100,000+	2%	24%	43%	31%

Q1	I'm spending more	I'm spending the same	I'm spending less	N/A
JEWELRY (OVERALL)	2%	14%	49%	35%
MEN	2%	16%	50%	32%
WOMEN	2%	14%	49%	35%
18-24 yrs	0%	15%	58%	27%
25-34yrs	1%	16%	48%	35%
35-44yrs	1%	14%	52%	33%
45-54yrs	3%	14%	45%	38%
55+ yrs	3%	15%	46%	36%
<$25,000	2%	15%	44%	39%
$25,000 - $34,999	2%	17%	50%	31%
$35,000 - $49,999	2%	14%	49%	35%
$50,000 - $74,999	1%	14%	52%	33%
$75,000 - $99,999	3%	18%	45%	34%
$100,000+	3%	11%	50%	36%

Cross Tabulations

Q1. How has your spending in the following categories changed due to the recent economic news?

Q1	I'm spending more	I'm spending the same	I'm spending less	N/A
FURNITURE (OVERALL)	2%	15%	48%	35%
MEN	2%	18%	47%	33%
WOMEN	2%	13%	48%	37%
18-24 yrs	0%	16%	53%	31%
25-34yrs	2%	17%	43%	38%
35-44yrs	1%	16%	50%	33%
45-54yrs	1%	15%	46%	38%
55+ yrs	3%	14%	47%	36%
<$25,000	2%	10%	52%	36%
$25,000 - $34,999	2%	18%	47%	34%
$35,000 - $49,999	2%	15%	47%	37%
$50,000 - $74,999	1%	16%	49%	34%
$75,000 - $99,999	5%	11%	44%	40%
$100,000+	2%	19%	44%	35%

Q1	I'm spending more	I'm spending the same	I'm spending less	N/A
SOFTWARE/GAMING (OVERALL)	4%	22%	49%	25%
MEN	4%	23%	49%	24%
WOMEN	4%	21%	48%	27%
18-24 yrs	5%	22%	53%	20%
25-34yrs	5%	23%	45%	27%
35-44yrs	2%	27%	46%	25%
45-54yrs	3%	19%	52%	26%
55+ yrs	5%	20%	47%	28%
<$25,000	4%	13%	52%	31%
$25,000 - $34,999	2%	25%	50%	23%
$35,000 - $49,999	3%	28%	45%	24%
$50,000 - $74,999	1%	22%	47%	30%
$75,000 - $99,999	8%	20%	44%	28%
$100,000+	7%	22%	50%	21%

Q1	I'm spending more	I'm spending the same	I'm spending less	N/A
HOME IMPROVEMENT (OVERALL)	5%	22%	49%	24%
MEN	6%	23%	48%	23%
WOMEN	4%	22%	50%	24%
18-24 yrs	6%	17%	60%	17%
25-34yrs	5%	23%	43%	29%
35-44yrs	5%	28%	46%	21%
45-54yrs	6%	20%	48%	26%
55+ yrs	5%	22%	50%	23%
<$25,000	6%	17%	50%	27%
$25,000 - $34,999	6%	24%	49%	21%
$35,000 - $49,999	7%	22%	45%	26%
$50,000 - $74,999	4%	24%	46%	26%
$75,000 - $99,999	7%	26%	52%	15%
$100,000+	5%	20%	51%	24%

Cross Tabulations

Q2. Regarding the following categories, do you expect to spend more money or less money on each over the next 6 months, compared to 2008?

Q2	I expect I'll spend more	I expect I'll spend the same	I expect I'll spend less	N/A
GROCERY (OVERALL)	18%	56%	25%	1%
MEN	9%	39%	48%	4%
WOMEN	8%	35%	53%	4%
18-24 yrs	16%	57%	27%	0%
25-34yrs	16%	52%	29%	3%
35-44yrs	19%	59%	22%	0%
45-54yrs	16%	55%	25%	4%
55+ yrs	21%	54%	24%	1%
<$25,000	16%	43%	35%	6%
$25,000 - $34,999	20%	61%	19%	0%
$35,000 - $49,999	21%	53%	24%	2%
$50,000 - $74,999	14%	60%	26%	0%
$75,000 - $99,999	19%	56%	24%	1%
$100,000+	17%	62%	21%	0%

Q2	I expect I'll spend more	I expect I'll spend the same	I expect I'll spend less	N/A
APPAREL (OVERALL)	8%	37%	51%	4%
MEN	9%	39%	48%	4%
WOMEN	8%	35%	52%	5%
18-24 yrs	7%	32%	58%	3%
25-34yrs	8%	44%	43%	5%
35-44yrs	9%	40%	47%	4%
45-54yrs	8%	33%	55%	4%
55+ yrs	8%	36%	52%	4%
<$25,000	8%	31%	47%	14%
$25,000 - $34,999	9%	42%	47%	2%
$35,000 - $49,999	9%	38%	47%	6%
$50,000 - $74,999	6%	40%	52%	2%
$75,000 - $99,999	6%	40%	49%	5%
$100,000+	11%	35%	51%	3%

Cross Tabulations

Q2. Regarding the following categories, do you expect to spend more money or less money on each over the next 6 months, compared to 2008?

Q2	I expect I'll spend more	I expect I'll spend the same	I expect I'll spend less	N/A
ELECTRONICS (OVERALL)	7%	29%	54%	10%
MEN	8%	32%	52%	8%
WOMEN	6%	27%	55%	12%
18-24 yrs	7%	33%	51%	9%
25-34yrs	5%	34%	52%	9%
35-44yrs	9%	33%	51%	7%
45-54yrs	8%	23%	53%	16%
55+ yrs	7%	26%	57%	10%
<$25,000	4%	25%	49%	22%
$25,000 - $34,999	7%	43%	46%	4%
$35,000 - $49,999	8%	30%	50%	12%
$50,000 - $74,999	6%	27%	57%	10%
$75,000 - $99,999	8%	25%	58%	9%
$100,000+	10%	31%	55%	4%

Cross Tabulations

Q2. Regarding the following categories, do you expect to spend more money or less money on each over the next 6 months, compared to 2008?

Q2	I expect I'll spend more	I expect I'll spend the same	I expect I'll spend less	N/A
TOYS (OVERALL)	3%	22%	40%	35%
MEN	4%	22%	38%	36%
WOMEN	2%	22%	41%	35%
18-24 yrs	2%	27%	44%	27%
25-34yrs	3%	23%	42%	32%
35-44yrs	5%	23%	38%	34%
45-54yrs	2%	21%	37%	40%
55+ yrs	3%	19%	40%	38%
<$25,000	2%	18%	33%	47%
$25,000 - $34,999	4%	24%	40%	32%
$35,000 - $49,999	4%	27%	38%	31%
$50,000 - $74,999	2%	22%	40%	36%
$75,000 - $99,999	0%	15%	44%	41%
$100,000+	3%	22%	43%	32%

Q2	I expect I'll spend more	I expect I'll spend the same	I expect I'll spend less	N/A
JEWELRY (OVERALL)	3%	19%	46%	32%
MEN	3%	20%	47%	30%
WOMEN	2%	19%	46%	33%
18-24 yrs	5%	24%	49%	22%
25-34yrs	2%	19%	47%	32%
35-44yrs	4%	19%	46%	31%
45-54yrs	1%	19%	44%	36%
55+ yrs	3%	18%	46%	33%
<$25,000	2%	12%	45%	41%
$25,000 - $34,999	4%	27%	42%	27%
$35,000 - $49,999	4%	24%	42%	30%
$50,000 - $74,999	2%	18%	48%	32%
$75,000 - $99,999	2%	19%	52%	27%
$100,000+	3%	16%	51%	30%

Cross Tabulations

Q2. Regarding the following categories, do you expect to spend more money or less money on each over the next 6 months, compared to 2008?

Q2	I expect I'll spend more	I expect I'll spend the same	I expect I'll spend less	N/A
FURNITURE (OVERALL)	4%	20%	46%	30%
MEN	5%	20%	46%	29%
WOMEN	3%	19%	47%	31%
18-24 yrs	6%	24%	45%	25%
25-34yrs	4%	17%	48%	31%
35-44yrs	7%	21%	44%	28%
45-54yrs	3%	16%	45%	36%
55+ yrs	3%	20%	47%	30%
<$25,000	2%	16%	45%	37%
$25,000 - $34,999	5%	28%	44%	23%
$35,000 - $49,999	6%	21%	43%	30%
$50,000 - $74,999	2%	21%	46%	31%
$75,000 - $99,999	5%	11%	52%	33%
$100,000+	5%	18%	51%	26%

Q2	I expect I'll spend more	I expect I'll spend the same	I expect I'll spend less	N/A
HOME IMPROVEMENT(OVERALL)	7%	28%	43%	22%
MEN	7%	29%	43%	21%
WOMEN	7%	26%	43%	24%
18-24 yrs	12%	27%	41%	20%
25-34yrs	7%	28%	35%	30%
35-44yrs	8%	28%	43%	21%
45-54yrs	5%	29%	42%	24%
55+ yrs	5%	27%	49%	19%
<$25,000	4%	29%	39%	28%
$25,000 - $34,999	8%	39%	37%	16%
$35,000 - $49,999	10%	25%	42%	23%
$50,000 - $74,999	5%	28%	43%	25%
$75,000 - $99,999	5%	27%	49%	19%
$100,000+	7%	26%	44%	23%

Cross Tabulations

Q2. Regarding the following categories, do you expect to spend more money or less money on each over the next 6 months, compared to 2008?

Q2	I expect I'll spend more	I expect I'll spend the same	I expect I'll spend less	N/A
SOFTWARE (OVERALL)	4%	26%	47%	23%
MEN	5%	25%	48%	22%
WOMEN	4%	26%	45%	25%
18-24 yrs	6%	31%	44%	19%
25-34yrs	5%	28%	43%	24%
35-44yrs	6%	30%	42%	22%
45-54yrs	4%	23%	48%	25%
55+ yrs	2%	22%	51%	25%
<$25,000	4%	17%	48%	31%
$25,000 - $34,999	4%	33%	43%	20%
$35,000 - $49,999	3%	30%	46%	21%
$50,000 - $74,999	4%	26%	44%	26%
$75,000 - $99,999	8%	16%	50%	26%
$100,000+	6%	24%	54%	16%

Cross Tabulations

Q6. When shopping for things in the following categories, do you normally make purchase decisions on your own or jointly with your spouse or partner?

Q6	On my own	With Spouse or Partner	N/A
GROCERY (OVERALL)	62%	32%	6%
MEN	62%	31%	7%
WOMEN	63%	33%	4%
18-24 yrs	64%	27%	9%
25-34yrs	59%	33%	8%
35-44yrs	61%	37%	2%
45-54yrs	63%	32%	5%
55+ yrs	64%	30%	6%
<$25,000	61%	27%	12%
$25,000 - $34,999	61%	34%	5%
$35,000 - $49,999	60%	33%	7%
$50,000 - $74,999	61%	37%	2%
$75,000 - $99,999	69%	22%	9%
$100,000+	65%	32%	3%

Q6	On my own	With Spouse or Partner	N/A
APPAREL (OVERALL)	**70%**	21%	9%
MEN	65%	26%	9%
WOMEN	75%	17%	8%
18-24 yrs	74%	17%	9%
25-34yrs	66%	23%	11%
35-44yrs	73%	23%	4%
45-54yrs	63%	29%	8%
55+ yrs	75%	16%	9%
<$25,000	71%	15%	14%
$25,000 - $34,999	72%	20%	8%
$35,000 - $49,999	75%	16%	9%
$50,000 - $74,999	69%	26%	5%
$75,000 - $99,999	70%	19%	11%
$100,000+	78%	19%	3%

Cross Tabulations

Q6. When shopping for things in the following categories, do you normally make purchase decisions on your own or jointly with your spouse or partner?

Q6	On my own	With Spouse or Partner	N/A
ELECTRONICS (OVERALL)	44%	46%	10%
MEN	44%	47%	9%
WOMEN	45%	43%	12%
18-24 yrs	48%	46%	6%
25-34yrs	38%	50%	12%
35-44yrs	48%	44%	8%
45-54yrs	35%	54%	11%
55+ yrs	51%	39%	10%
<$25,000	44%	33%	23%
$25,000 - $34,999	50%	41%	9%
$35,000 - $49,999	46%	43%	11%
$50,000 - $74,999	40%	52%	8%
$75,000 - $99,999	48%	42%	10%
$100,000+	44%	54%	2%

Q6	On my own	With Spouse or Partner	N/A
TOYS (OVERALL)	**37%**	24%	39%
MEN	33%	25%	42%
WOMEN	40%	23%	37%
18-24 yrs	40%	21%	39%
25-34yrs	35%	26%	39%
35-44yrs	42%	25%	33%
45-54yrs	28%	28%	44%
55+ yrs	40%	21%	39%
<$25,000	29%	18%	53%
$25,000 - $34,999	42%	26%	32%
$35,000 - $49,999	39%	28%	33%
$50,000 - $74,999	32%	30%	38%
$75,000 - $99,999	42%	14%	44%
$100,000+	41%	19%	40%

Cross Tabulations

Q6. When shopping for things in the following categories, do you normally make purchase decisions on your own or jointly with your spouse or partner?

Q6	On my own	With Spouse or Partner	N/A
HOME IMPROVEMENT (OVERALL)	33%	47%	20%
MEN	33%	47%	20%
WOMEN	33%	46%	21%
18-24 yrs	31%	42%	27%
25-34yrs	27%	49%	24%
35-44yrs	37%	47%	16%
45-54yrs	28%	52%	20%
55+ yrs	39%	43%	18%
<$25,000	31%	41%	28%
$25,000 - $34,999	35%	48%	17%
$35,000 - $49,999	34%	43%	23%
$50,000 - $74,999	31%	54%	15%
$75,000 - $99,999	33%	45%	22%
$100,000+	32%	54%	14%

Q6	On my own	With Spouse or Partner	N/A
JEWELRY (OVERALL)	42%	26%	32%
MEN	41%	26%	33%
WOMEN	42%	25%	33%
18-24 yrs	46%	21%	33%
25-34yrs	35%	31%	34%
35-44yrs	47%	25%	28%
45-54yrs	34%	26%	40%
55+ yrs	45%	24%	31%
<$25,000	40%	17%	43%
$25,000 - $34,999	47%	26%	27%
$35,000 - $49,999	44%	24%	32%
$50,000 - $74,999	43%	30%	27%
$75,000 - $99,999	54%	21%	25%
$100,000+	35%	29%	36%

Cross Tabulations

Q6. When shopping for things in the following categories, do you normally make purchase decisions on your own or jointly with your spouse or partner?

Q6	On my own	With Spouse or Partner	N/A
FURNITURE (OVERALL)	30%	49%	21%
MEN	29%	50%	21%
WOMEN	30%	49%	21%
18-24 yrs	34%	44%	22%
25-34yrs	26%	53%	21%
35-44yrs	31%	53%	16%
45-54yrs	21%	53%	26%
55+ yrs	36%	44%	20%
<$25,000	31%	39%	30%
$25,000 - $34,999	35%	49%	16%
$35,000 - $49,999	30%	48%	22%
$50,000 - $74,999	28%	59%	13%
$75,000 - $99,999	28%	48%	24%
$100,000+	25%	57%	18%

Q6	On my own	With Spouse or Partner	N/A
SOFTWARE/GAMING (OVERALL)	**48%**	27%	25%
MEN	49%	28%	23%
WOMEN	48%	25%	27%
18-24 yrs	49%	25%	26%
25-34yrs	35%	35%	30%
35-44yrs	55%	26%	19%
45-54yrs	42%	30%	28%
55+ yrs	54%	21%	25%
<$25,000	47%	20%	33%
$25,000 - $34,999	57%	25%	18%
$35,000 - $49,999	52%	24%	24%
$50,000 - $74,999	40%	33%	27%
$75,000 - $99,999	57%	21%	22%
$100,000+	46%	30%	24%

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Miller Zell is a leader in strategic retail consulting specializing in retail design, shopper marketing, shopper insights research & analysis, and store implementation, serving some of the world's best known brands. Headquartered in Atlanta, Georgia, for over more than 30 years, Miller Zell designs and builds award-winning selling environments across retail sectors including grocery, financial institutions, dealer-based businesses, restaurant chains, consumer products, and mass merchandise.

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About National Research Network

NRN is a full service consumer research company focusing on the design, execution, and analysis of consumer research studies. Through our exclusive relationship with General Growth Properties, a shopping center leader with over 200 shopping malls in 44 states, as well as, NRN¹s 150,000 plus member On-line Opinion Club, we have direct access to one of the largest shopper-centric resources of its kind. Coupled with our industry leading analysts and innovative research techniques comprised of Custom Research, In-person Mall Intercept Surveys, The NRN On-line Opinion Club, Consumer Value Trend Reports, and The Concept Store, NRN is able to deliver research that¹s quick, qualified and value driven.

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