

2008—Coping with the Economy

How is this affecting Shopper Behavior?



The Marketplace

CIA

Only 23% of consumers were confident/very confident in the economy in April '08, beating the record low set in March (24.8%) and making up less than half of April 2007's reading (46.5%)

82.2% of consumers indicated in April that pump prices are affecting their spend in other areas

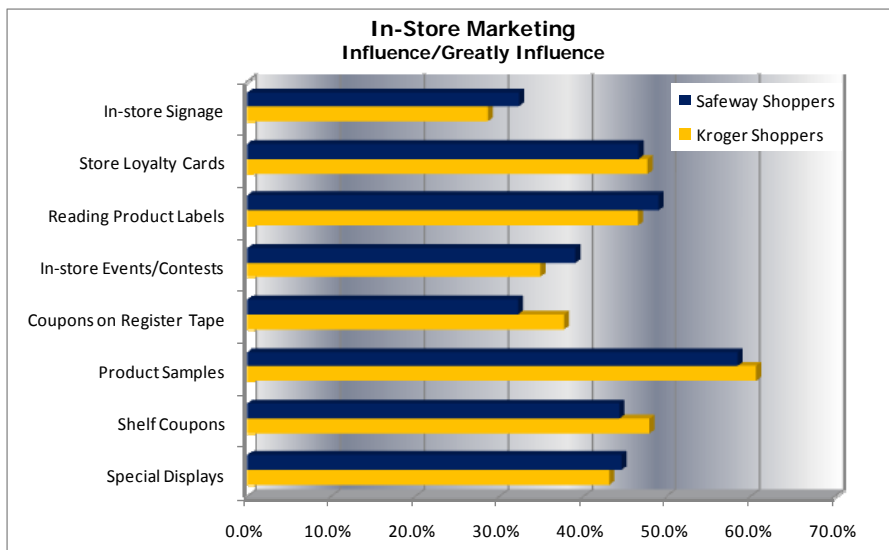
Retail Merchandise Categories - 90 Day Outlook (April 08 compared to March 08 and April 07)

Category	Mar-08	Apr-07	Category	Mar-08	Apr-07
Children's	DOWN	DOWN	Toys and Games	DOWN	DOWN
Women's Dress	DOWN	DOWN	CDs/DVDs/Videos/Books	DOWN	DOWN
Women's Casual	DOWN	DOWN	Electronics	DOWN	DOWN
Men's Dress	DOWN	DOWN	Groceries	DOWN	DOWN
Men's Casual	DOWN	DOWN	Home Improvement	DOWN	DOWN
Shoes	DOWN	DOWN	Lawn & Garden	DOWN	DOWN
HBC	DOWN	DOWN	Home Furniture	DOWN	DOWN
Dining Out	DOWN	DOWN	Decorative Home Furnishings	DOWN	DOWN
Sporting Goods	DOWN	DOWN	Linens/Bedding/Draperies	DOWN	DOWN

To receive the BIGresearch Executive Briefing, go to www.bigresearch.com and click on "Complimentary Top Line Findings"

Influencing the Consumer

SIMM



Shopper Marketing—What to do?

- WHO:** Get to know your customers and your non-customers.
- WHERE:** Consumers are shopping around & have tools available 24/7 to find the best deals.
- WHAT:** Consumers are SMART—know their behavior (using coupons, shopping more online).
- WHY:** Know the reasons behind consumers' decisions—go beyond the WHAT.
- HOW:** Talk to your consumers about what influences them—don't assume you know!

think **BIG**...

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...to find the answers