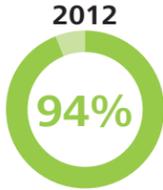




# The 2013 American Pantry Study Implications: Will consumers choose you?

### Frugal attitudes and behaviors have endured

Even if the economy improves, I will remain cautious and keep my spending at its current level.



### Selective loyalty among "Must Have Brands"

Consumers became more selectively brand loyal, as they downgraded **1 out of 6** brands during the recession.



"Most of the time I can't tell the difference between the store brands and national brands."

— Consumer interviewee

"I am spending more appropriately now. The recession has been a valuable learning experience."

— Consumer interviewee

# 79%

believe economy is currently in recession



### Cross channel shopping remains the norm

As a result, national brands compete amidst channel conflict and increasing consumer access to store brands.

Average number of channels shopped for each product category:



# 2.5

Average  
(across 28 categories)



# 3.3

Highest  
(across 28 categories)



# 2.0

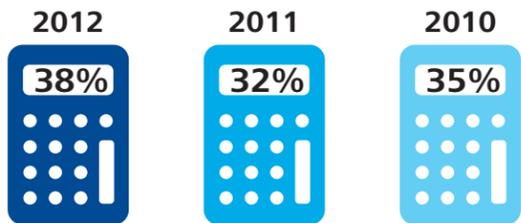
Lowest  
(across 28 categories)

CONSUMER COPING STRATEGIES

### Consumers still find "value" in store brands

Store brands are entrenched in the pantry and are expanding into more product categories

I am buying store brands in categories I never have purchased before:



### Consumers are embracing technology

Interest in new technology is increasing. Millennials lead, but interest among Baby Boomers is rising at a higher rate. Smartphones play a role in-store and away from store for shoppers.



Using coupons sent to your mobile phone that you can scan at check out:

Age			
21-29		45-70	
2012	2011	2012	2011
49	43	23	12

Rapidly increasing interest

### Loyalty card usage is growing:

**39%** have 3 or more cards from different stores – up from **28%** in 2010



**58%** use cards every time they shop – up from **44%** in 2010

### Unmet demand for shopping online

Significant unmet demand for online purchases for in-store pickup, primarily in food and beverage categories.



# 71%

only use coupons for items they would have purchased anyway

Almost **8 in 10 shoppers (77%)** pay close attention to nutritional content of foods they buy



For more information go to: [www.deloitte.com/us/AmericanPantry13](http://www.deloitte.com/us/AmericanPantry13)

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