

Buying & Shopping Preferences of 2008 Presidential Voters

The Nielsen Company

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Agenda

- Election Recap
- Retail Channel Preferences
- Product Category Preferences*
- Top Selling Items*
- 2008 Holiday Spending Expectations



* Work in progress

Election Recap

- Results from a Homescan survey capturing household-level voting for our 2008 Presidential election was very similar to actual election results:
 - Actual “persons” vote: Obama: 53%; McCain: 47%
 - Homescan Panel “household” vote: Obama: 55%; McCain 45%
 - Homescan state-by-state wins aligned in all but 3 of our 48 contiguous U.S. States



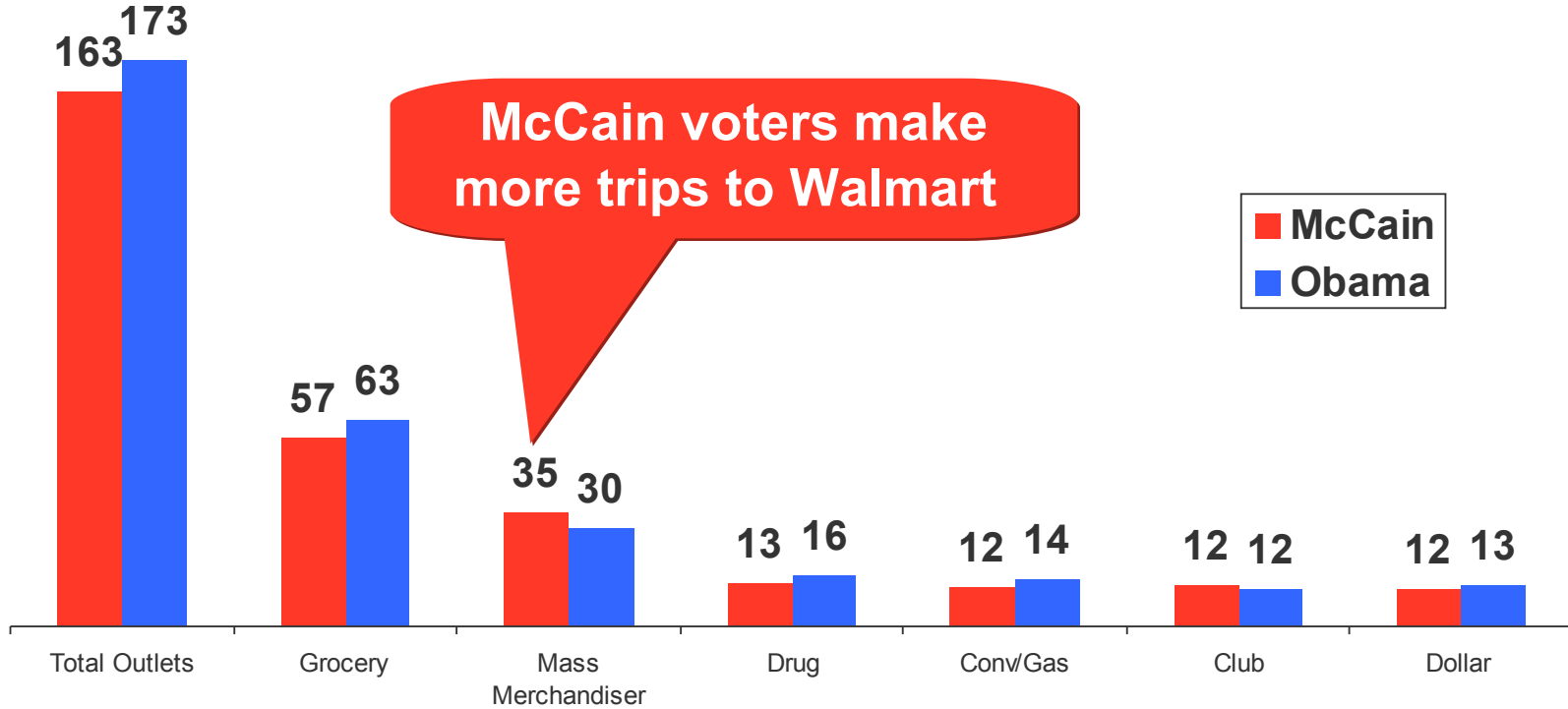
- We thought it would be interesting to examine differences in the buying & shopping patterns of households who voted for the two candidates

Obama Voters More Frequent Shoppers

On All-Outlet Basis & in Most Traditional CPG Retail Channels



Annual Trips Per Shopping Household by Voters for:

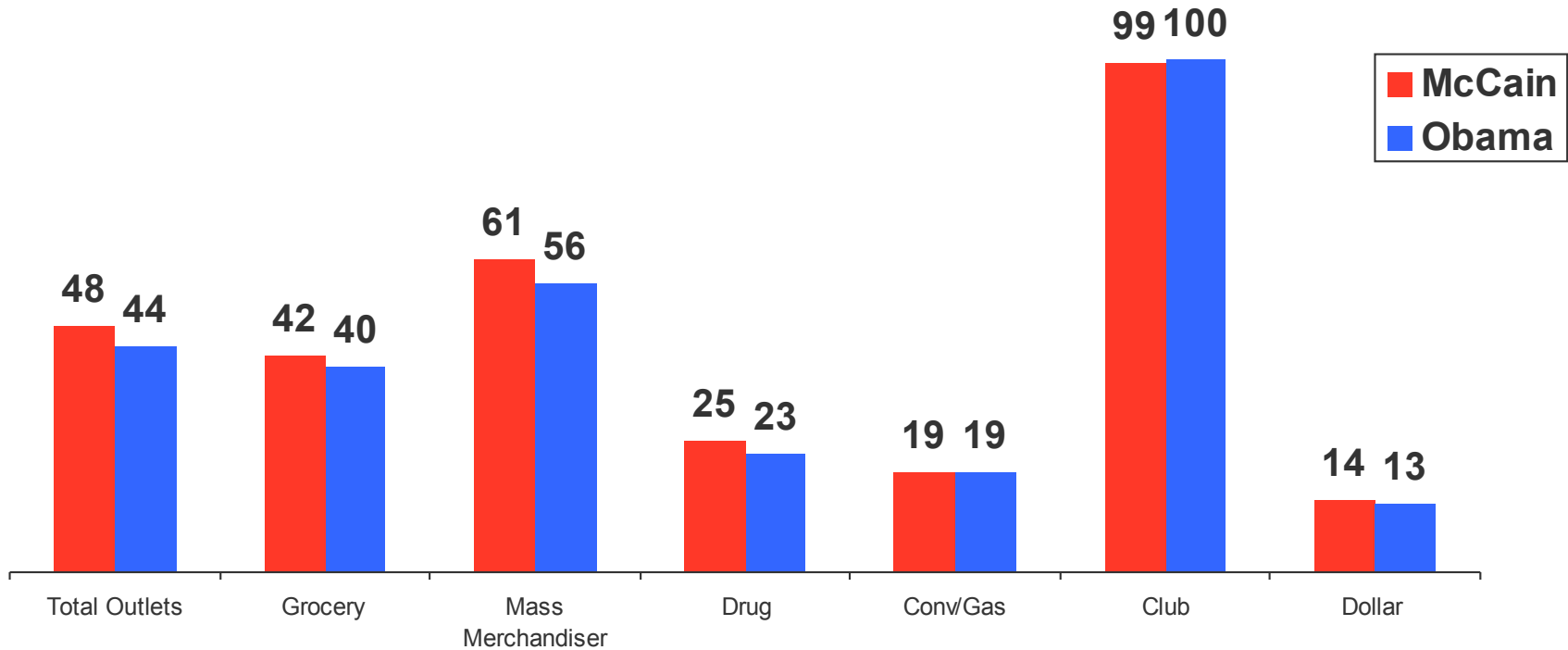


Source: Homescan®, a service of The Nielsen Company – 52 w/e 10/04/2008

McCain Voters Bigger Per Trip Spenders In Most Traditional CPG Retail Channels



Per Trip \$ Spending by Voters for:

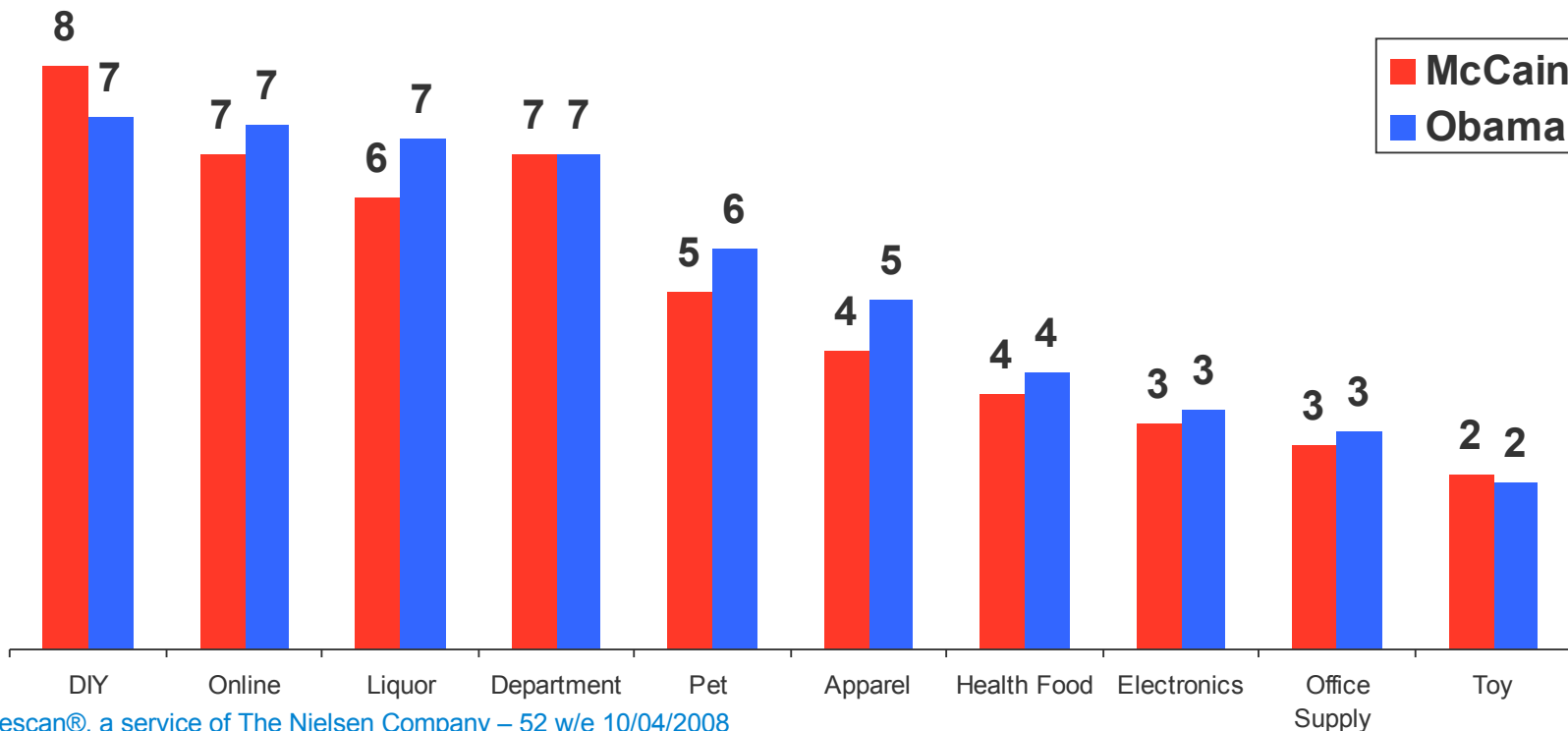


Source: Homescan®, a service of The Nielsen Company – 52 w/e 10/04/2008 – total basket ring

Obama Voters More Frequent Shoppers In More Alternative Retail Channels Too



Annual Trips Per Shopping Household by Voters for:



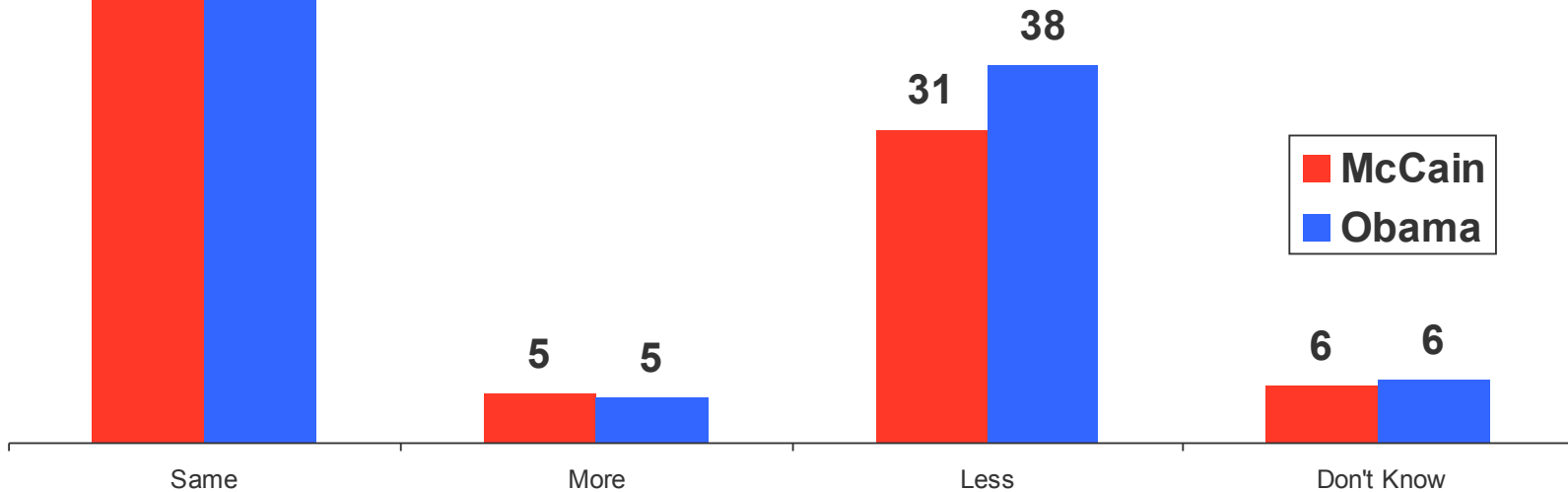
Source: Homescan®, a service of The Nielsen Company – 52 w/e 10/04/2008

McCain Voters More Optimistic About Holiday Spending in 2008



63% of McCain voters plan to spend same or more; 38% of Obama voters to spend less

This Holiday Do You Expect to Spend More, Less, Same versus Last Year?



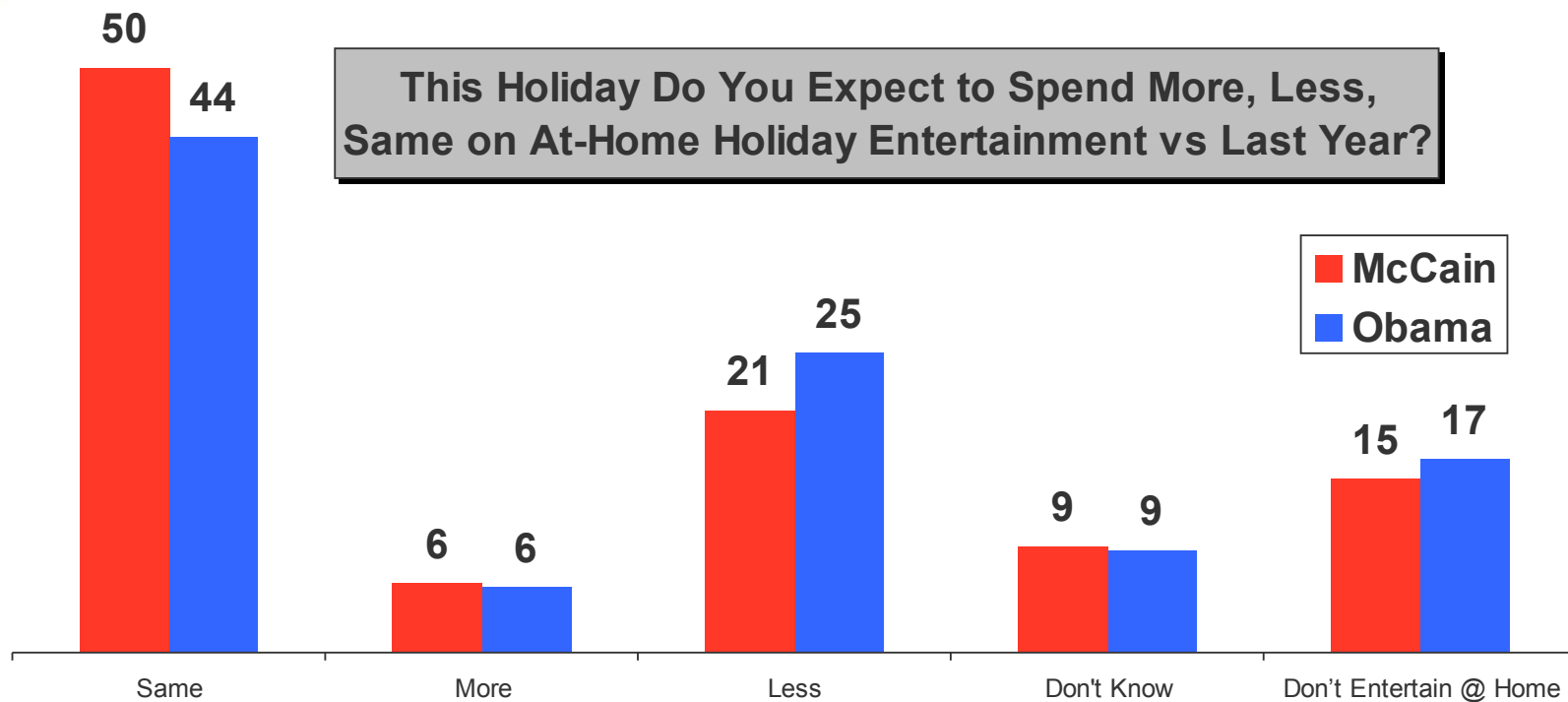
Source: Homescan®, a service of The Nielsen Company – Early to Mid-September PanelViews Survey

McCain Voters More Optimistic About Spending on At-Home Entertainment in 2008



56% of McCain voters plan to spend same or more; 25% of Obama voters to spend less

This Holiday Do You Expect to Spend More, Less, Same on At-Home Holiday Entertainment vs Last Year?



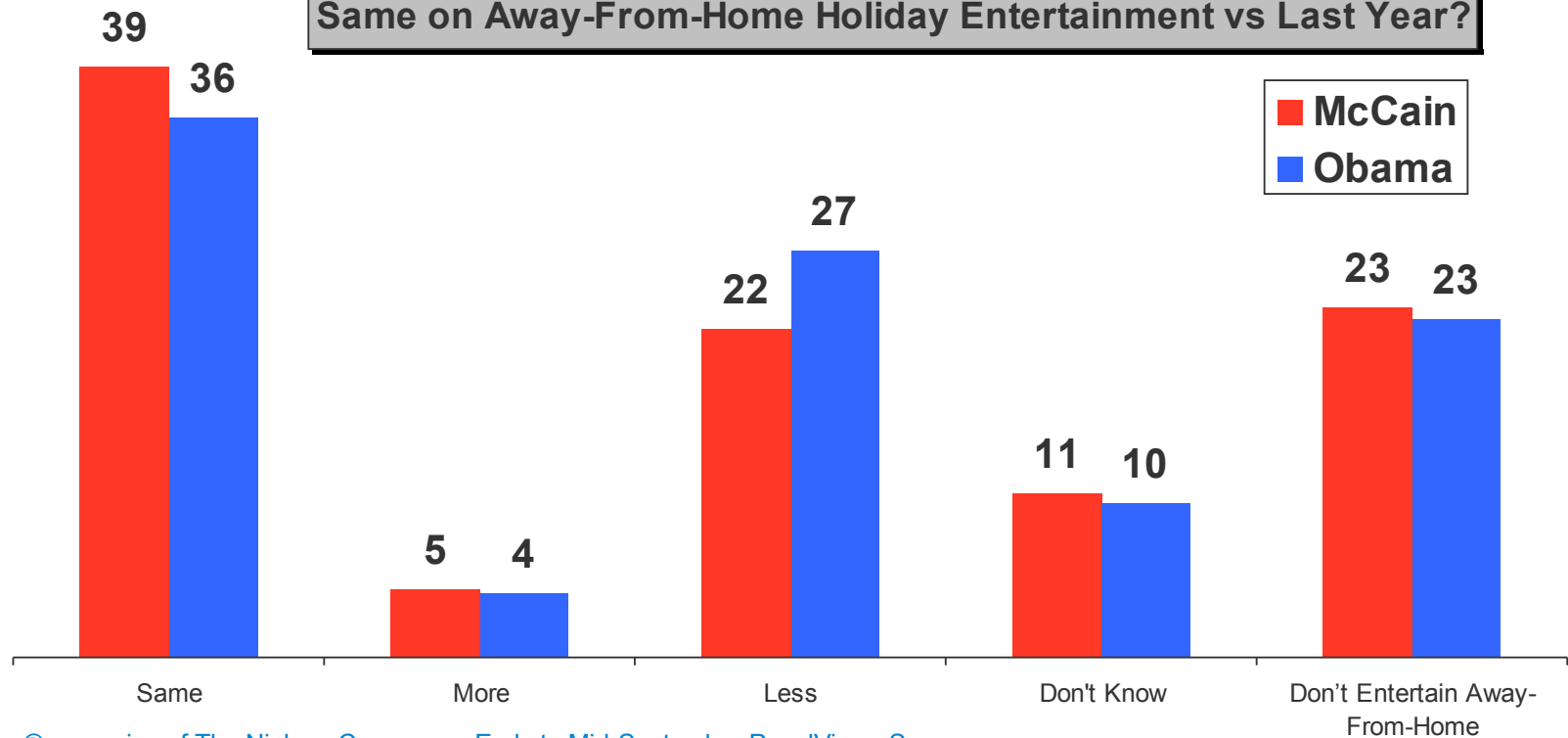
Source: Homescan®, a service of The Nielsen Company – Early to Mid-September PanelViews Survey

McCain Voters More Optimistic About Spending on Away-From-Home Entertainment in 2008



44% of McCain voters plan to spend same or more; 25% of Obama voters to spend less

This Holiday Do You Expect to Spend More, Less, Same on Away-From-Home Holiday Entertainment vs Last Year?



Source: Homescan®, a service of The Nielsen Company – Early to Mid-September PanelViews Survey

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