

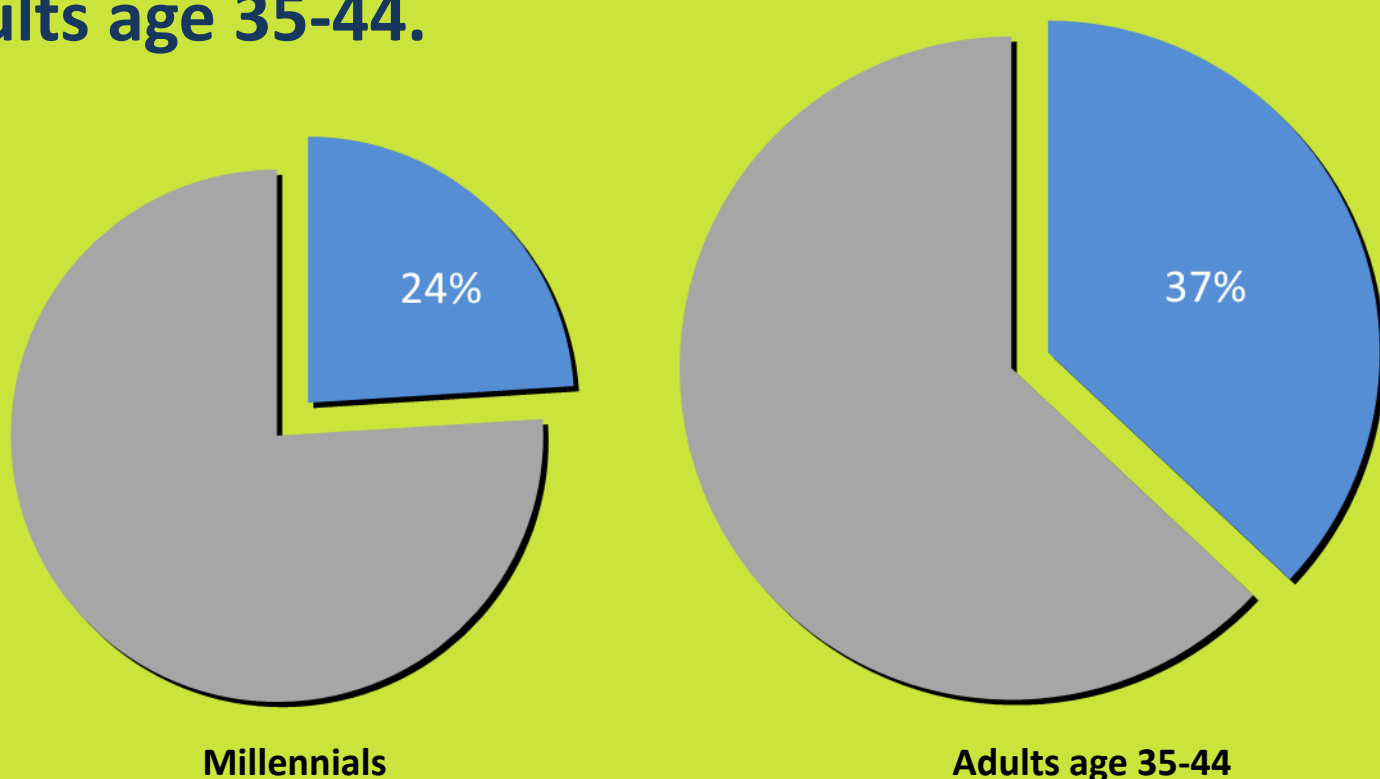


# Dollar Stores Draw Deal Seekers

## Personal Care Shoppers Seek Value

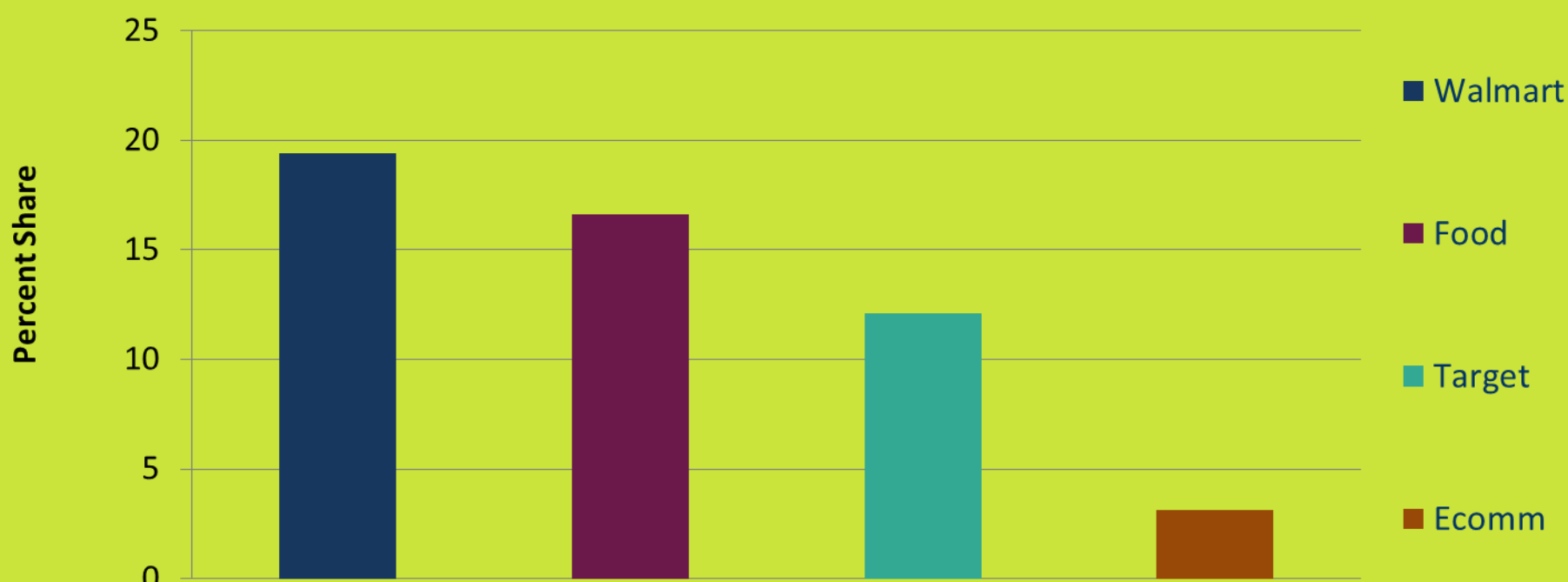
Who are the heaviest buyers of Personal Care?  
Adults age 35-44.

37 percent of adults 35-44 are heavy buyers compared to just 24% of millennials.



Where do consumers buy most frequently?

Share of Outlet Mentions

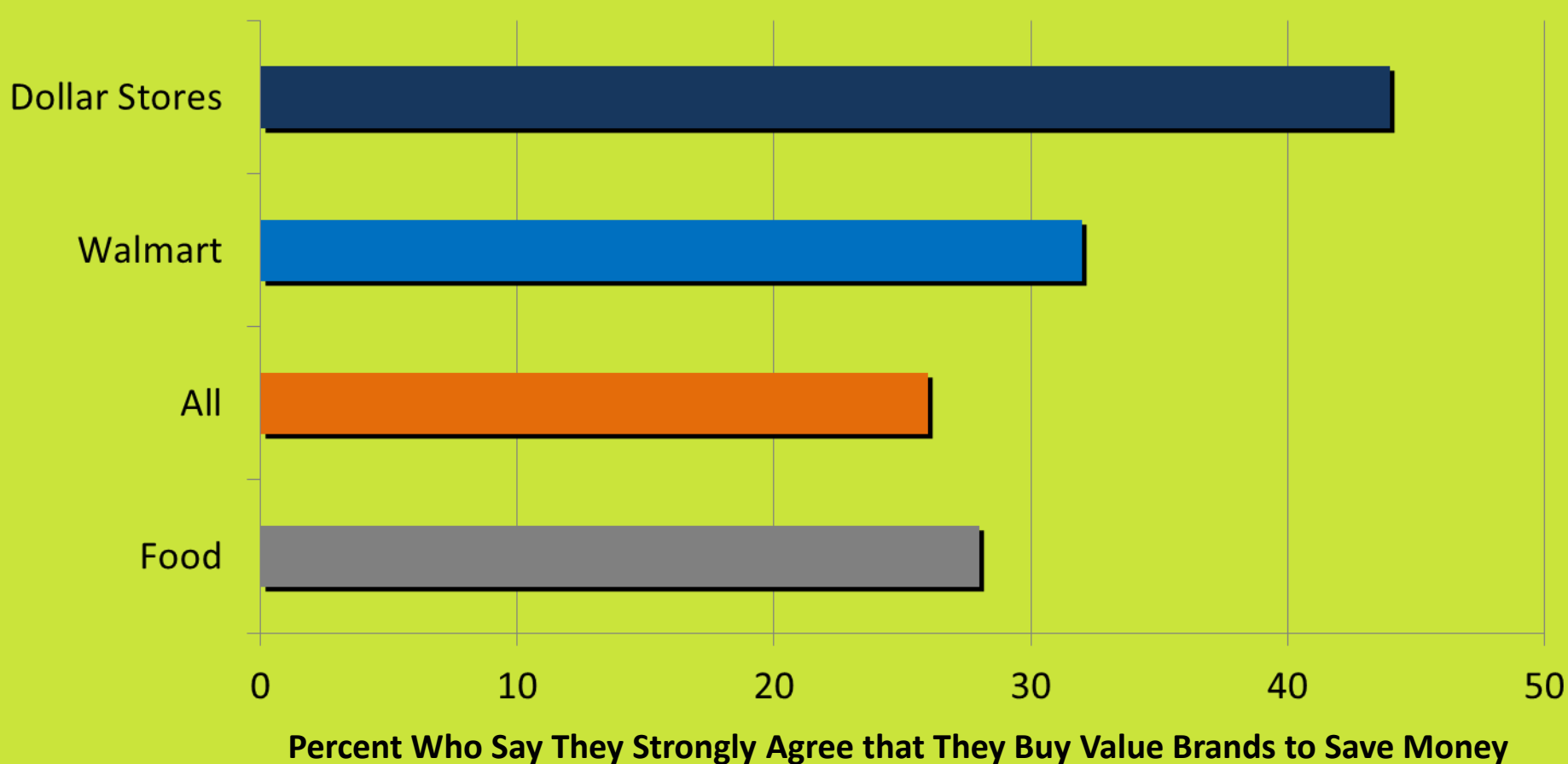


But among heavy deal buyers, Walmart's share drops. So where do those consumers go? They go to CVS, Walgreens and Dollar Stores.



A reason for this shift toward Dollar Stores is that many consumers say they regularly try to purchase Personal Care Value Brands.

Value Brand Purchasing Among Outlet Shoppers for Personal Care



\*Being a heavy buyer requires broad purchasing in many categories, as opposed to frequent purchasing in few categories.

\*Share of Outlet Mentions is a metric that shows a high correlation to overall market share.

\*Regular Purchasing means purchasing three or more times per year.



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Source: TABS Analytics 2017 Personal Care Study. 1,000 General Population Adults ages 18-75. "Personal Care" defined as the following categories: Haircare – shampoo & conditioner, hair styling/treatments, hair coloring; Deodorant; Personal wash – bar soap and body wash; Face Care – Razors & Cream/Gel; Mouthwash; Toothpaste – toothpaste, toothbrush; Feminine Care – feminine pads & liners, tampons; Adult Incontinence.