

CSG CONSUMER SPENDING REPORT

AUGUST 2018

BACK TO SCHOOL BOOSTS SPENDING

After a two-month lull and mixed results over the course of the last six months, all signs point up in this month's report thanks to the annual economic jolt that back-to-school spending delivers.

The CSG Retail Spending Index jumped 4 points, the largest gain we've seen since February. Those time-crunched shoppers preparing for school and college in August also plan to dine out en masse. The 5 point gain in the Restaurant Spending Index is the largest in more than a year, and it's the largest July-to-August jump since polling began in 2014.

Inside, we share additional positive data from the foodservice front, chart the return of the true believers in the state of the US economy and break down where consumers plan to make their back-to-school purchases.

CSG
US Spending Monitor

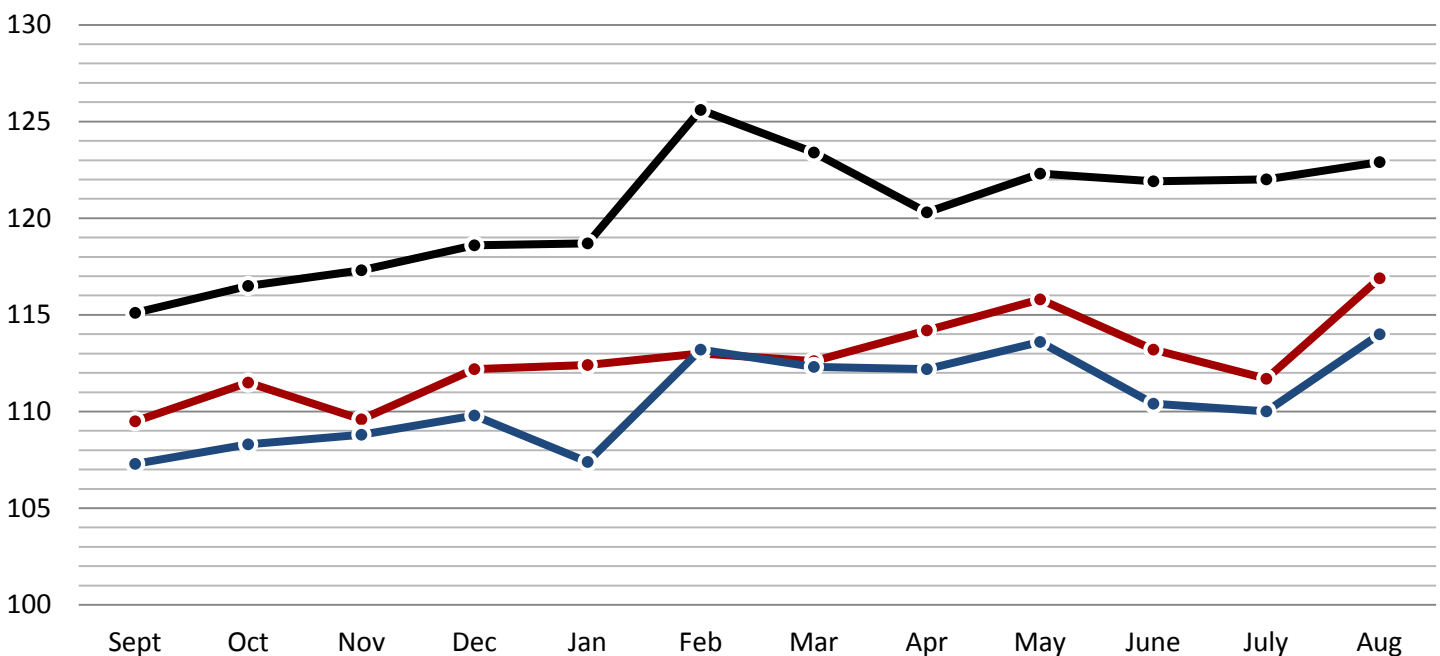
122.9

CSG
Restaurant Spending Index

116.9

CSG
Retail Spending Index

114.0

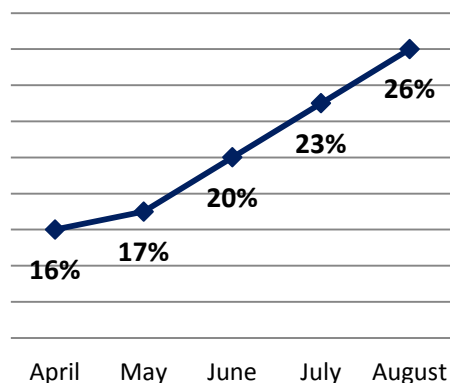


SUPER-CONFIDENT SEGMENT GROWING

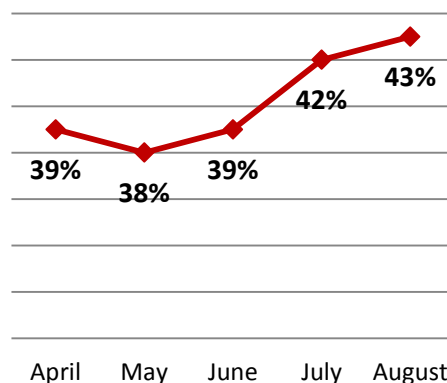
Top line confidence in the economy as measured by poll respondents rating the US economy as "excellent" and "getting better," hit a year-to-date low in April. That sentiment played a large role in the dramatic two-month decline in the Spending Index in March and April (see pg1). But the true believers are coming back, as seen in the charts here.

POLL RESPONDENTS WHO . . .

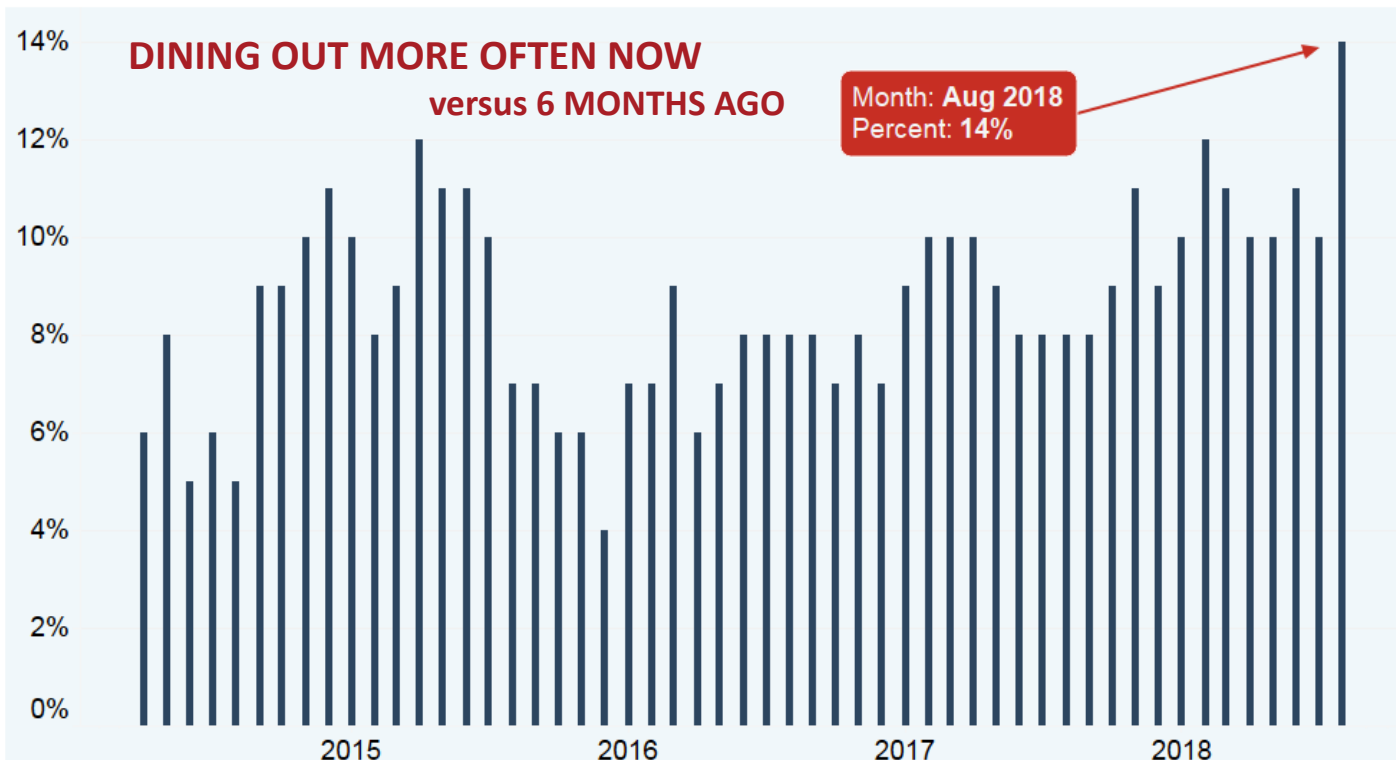
RATE THE ECONOMY AS "EXCELLENT"



FEEL THE ECONOMY IS "GETTING BETTER"



DINING TRENDS



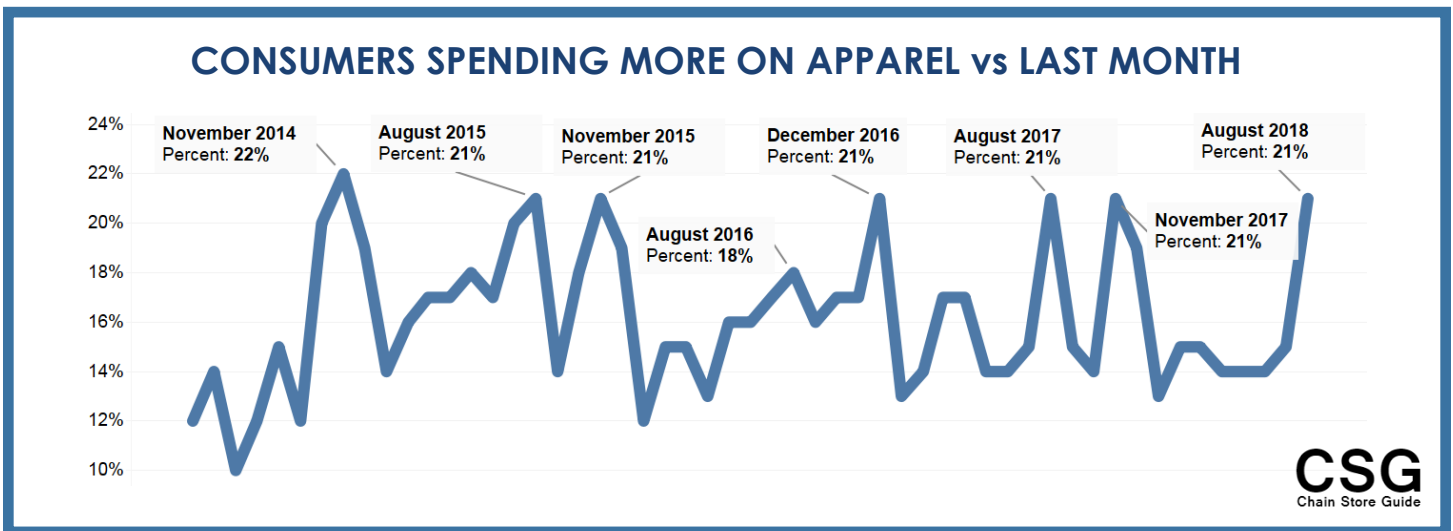
Get More Leads & Drive More Sales With
CSG's Restaurant Franchisee Premier Database

[CLICK HERE FOR DETAILS](#)

RETAIL FOCUS

BTS EDITION

As shoppers head to stores and online in search of new shoes, clothes and school supplies in August, we take a look at historical data from CSG polling that outlines the two months a year - August and November - that consumers plan to spend more on clothes, shoes and the like. We also take a look at data from our friends at the *National Retail Federation* that shows where consumers plan to do their shopping for school related items.



TOP DESTINATIONS

FOR CONSUMERS SHOPPING FOR BACK TO SCHOOL ITEMS

55%
will shop online retailers



35% will shop office supply stores



57% will shop department stores

52%
will shop
discount stores



51%
will shop
clothing stores

ABOUT CHAIN STORE GUIDE

For more than 80 years, Chain Store Guide (CSG) has been the leading provider of comprehensive and definitive retail and foodservice intelligence to businesses around the world.

Chain Store Guide data is the definitive source that is used by manufacturers, suppliers, service providers, brokers, real estate professionals, retailers, analysts, consultants and other professionals seeking to gain insight into retail and foodservice markets in the U.S. and Canada.

Our data includes all major retailers, restaurants, distributors and wholesalers in the United States and Canada with contact information on over 70,100 chains.

OUR DATA IS USED FOR

- **Competitive Analysis**
- **Proximity Analysis**
- **Market Share Reporting**
- **Industry Profiling**
- **Market + Trend Analysis**
- **Forecasting**
- **Site Planning**
- **Industry Profiling**
- **Data Appending/Cleansing**
- **Lead Generation**

ABOUT THE CONSUMER SPENDING REPORT

The CSG US Spending Monitor, Retail Spending Index, and Restaurant Spending Index are monthly indexes of consumer spending intentions and capacity **based on interviews with a random sample of 1,500 U.S. adults**. In addition to spending, the survey asks consumers their opinions on the U.S. economy and their personal finances, retail and other discretionary spending. The Monitor began in January 2014 with a base index of 100. CSG captures a unique view of consumer, retail, and foodservice spending intentions. The CSR includes the CSG US Spending Monitor, which tracks economic confidence and spending intentions of US consumers, the CSG Restaurant Spending Index, which measures consumer spending intentions for restaurant purchases, and the CSG Retail Spending Index that measures consumer retail and discretionary spending confidence.