



Winning Over the Aspirational Independent

*Why this demographic is
important to retailers and crucial
to upcoming political campaigns*

NRF National
Retail
Federation

SKDK

Overview

We've all heard of Soccer Moms, a key swing voter segment in the 1996 presidential election with a clear sense of identity. Now it's time to switch our attention to **Aspirational Independents**.

Aspirational Independents represent **15 percent of the voting population** and have a unique set of *overlapping attitudes toward shopping and important policy issues* that makes them highly valued to retailers and politicians alike. They are sophisticated and complex retail consumers and, more importantly, they are politically unaligned.

NRF partnered with SKDK on a large-scale study to help retailers and politicians better understand this segment and the key values that drive their decision making with respect to shopping and voting.



Why Aspirational Independents matter

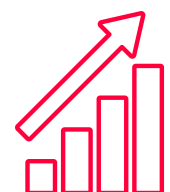
At 15% of the voting population, Aspirational Independents represent a significant block of undecided voters. They are also at a pivotal point in their lives as consumers – settling down, starting families and creating formative bonds with brands and their communities.



Younger: 77% under 50, including 41% under 35



More diverse: 49% people of color



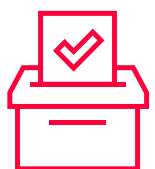
Economically influential: The majority of this segment falls into the middle and upper middle class: 42% make \$75K-\$200K; nearly half (47%) are looking to increase their spending this year



Just getting settled: 43% have lived in their current area 3-10 years



Parents: 58% are parents and the health and economic well-being of their families are top of mind



Politically independent: Tend to be moderate; many are undecided on the '22 House vote – and willingness to “compromise” is high on their issue wish list

How Aspirational Independents think, shop and vote



Mindset

- **They seek fun experiences and like to share them:** They enjoy shopping and it's part of how they socialize – including getting and sharing recommendations.



Retail habits

- **They are leaders and have confidence in their purchasing:** They like to be in charge and see themselves as trendsetters in both their online and offline communities. As part of this, they invest a great deal of time and effort to research and validate information and take pride in having an informed opinion both in how they shop and what they believe.
- **They are increasing spending in every corner of retail:** Many will spend more this year, and they spend at nearly every type of retailer.



Politics

- **They feel left out of the current political and ideological conversation:** They feel a deeply personal toll from hyper-partisan politics, actively disengaging from friends and family members on political or current events-based discussions for fear of getting a partisan reaction. They find political conversations increasingly frustrating and exhausting.
- **They crave action over policies and rhetoric:** This cohort rebels against what they see as corporations becoming too political and appeasing extremes. They also seek out and respond negatively to hypocrisy. If a brand or retailer does take a stance on an issue, they should expect to be held accountable.

Communicating with Aspirational Independents

- Be original, **honest**, jargon-free and avoid what might sound like empty promises; they are VERY skeptical. They crave action over policies and promises.
- Connect to their desire to be **leaders**, not followers of trends — they see themselves as smarter than the average shopper.
- Respect their **independent** spirit and desire to be unanchored and allow them to show off who they are with you.
- They have an **exploratory** mindset — provide them with information and choice so they can validate their opinions and beliefs.
- Communicate with them across all mediums and channels.

The Retail Bottom Line

Don't pander to this cohort. Their loyalty is fluid and they are turned off by what they perceive as empty rhetoric or lack of follow-through. Understand that they will research and validate whatever you offer them — whether it's a product or a stance on an issue.

The Political Bottom Line

Politicians will need to motivate this cohort to vote as they are alienated by extremes and may just opt out if they are feeling ignored. But they are willing to show up for politicians who are willing to compromise and who recognize their desire for meaningful results.



Detailed Findings on
Aspirational Independents

Aspirational Independents are power shoppers. They want to spend more this year and spend more in ALL formats and channels.

- Nearly half (47%) are looking to increase spending this year — and at a rate far greater than the average voter.

Percent of respondents who shop at least monthly in the following ways



Unlike most shoppers, Aspirational Independents enjoy a wide variety of shopping venues: stores, online and new ways of shopping are all popular.

Aspirational Independents are recommending machines. Getting and giving ideas is a core part of their identity.

This group is comfortable sharing their recommendations and also searching for opinions and insights through discussions with those closest to them or even from complete strangers on social media. This audience is an ideal “word-of-mouth” target. They shared how important it is for them to discover new things and ideas they have not considered, and they are agnostic about the source.

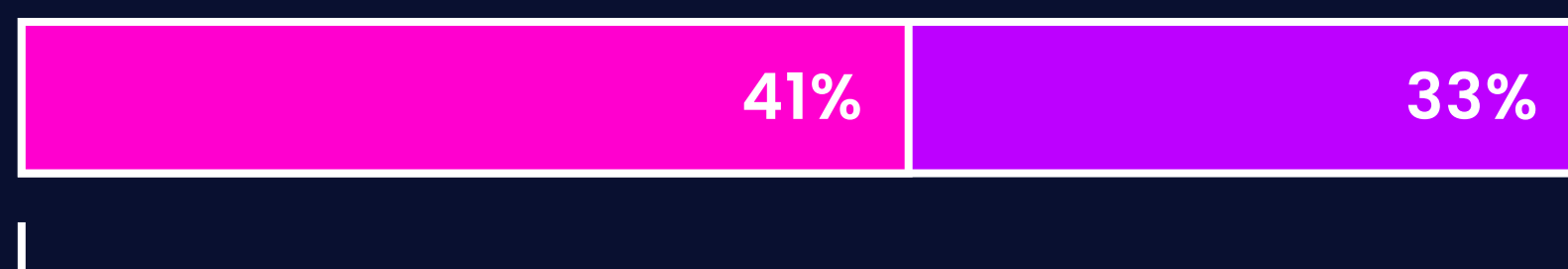


Aspirational Independents are looking for that right mix of **price, selection, customer service and trends** — but all those factors feel very dynamic to them. Their loyalty to brands and retailers shifts in part depending on which is offering them the best experience.

Aspirational Independents like “doing some homework” before they shop or vote.

Because they view themselves as opinion and trend leaders, they put the work into validating and verifying their choices. Nearly three in four are often researching what they want online before they go shopping.

“I often research things online before I go shopping.”

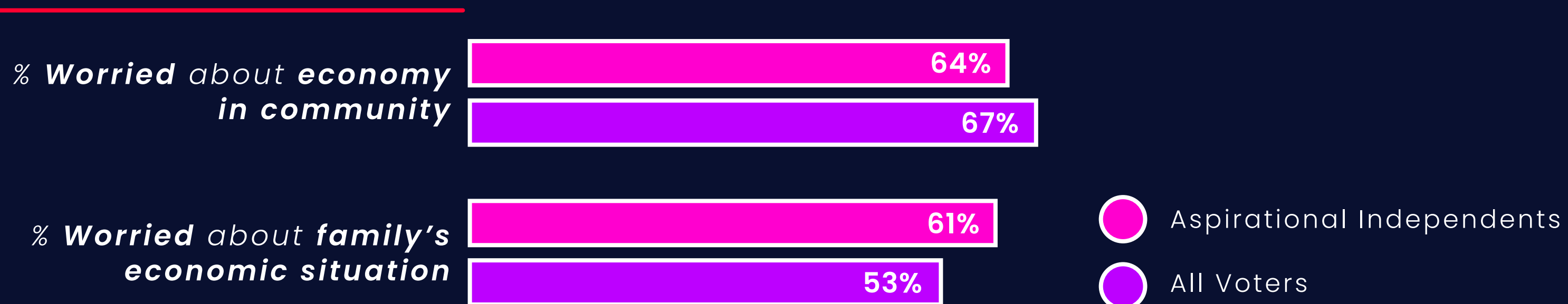
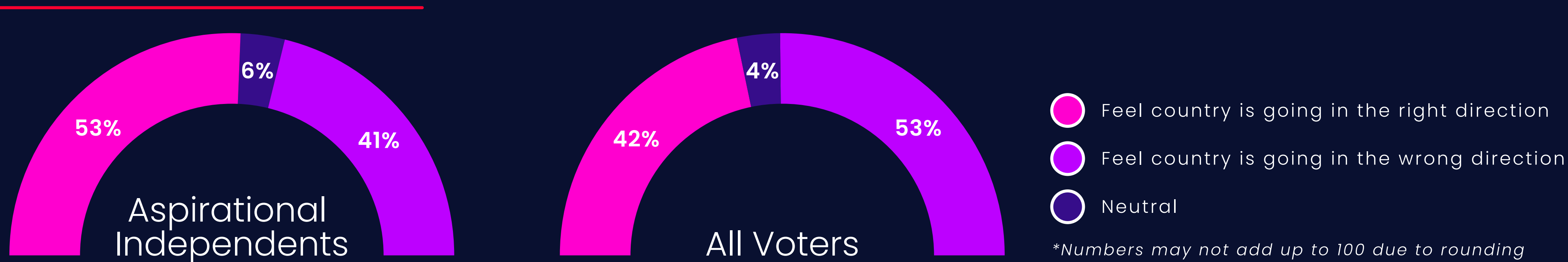


74% Agree

- Somewhat Agree
- Strongly Agree

- Part of the reason for this frequent research is that Aspirational Independents think of the world as dynamic and ever-changing; what feels true today might not be true tomorrow.
- As such, they talked about relying on their own research skills and ability to “do their homework” to see if the assumptions they hold about a store, brand or politician hold up.
- They are also willing to occasionally re-verify any assumptions they hold about brand loyalties.

Politically, their views are slightly more optimistic than the nation at large but they can easily become disengaged or frustrated by a perceived lack of change or lack of authenticity.



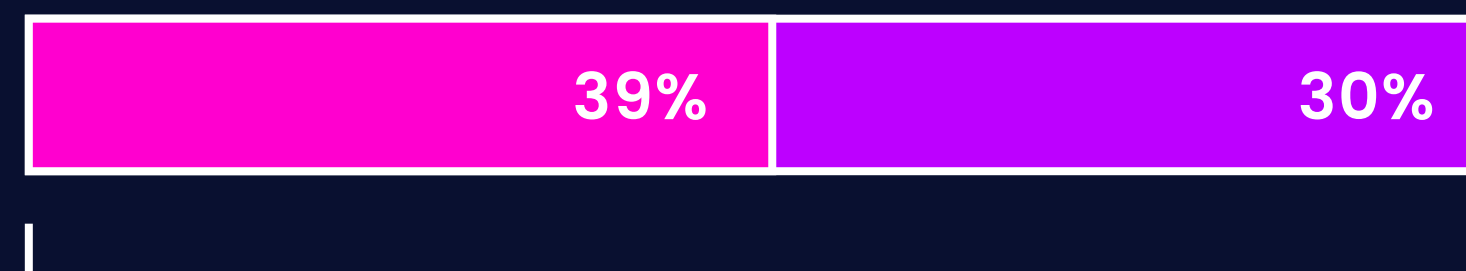
They're worried about the broader economy but are equally concerned about their own household's financial health.

Also increasingly feel left out of the current political and ideological conversation.

With a growing sense of isolation in a partisan world, they are calling for compromise and peace.

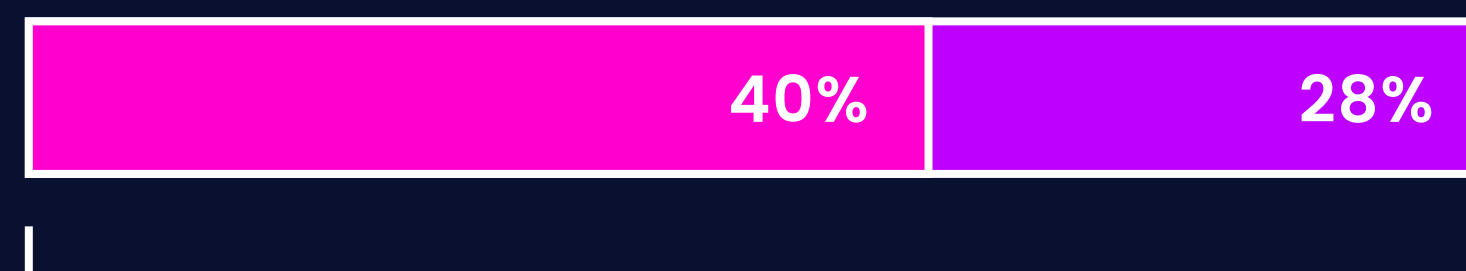
They embrace common-sense and centrist rhetoric over partisan rhetoric. The large majority of Aspirational Independents feel left out of a political process that caters to extremes.

“No one in politics is really looking out for people like me.”



69% Agree

“Politicians listen more to the extreme partisans than people like me.”



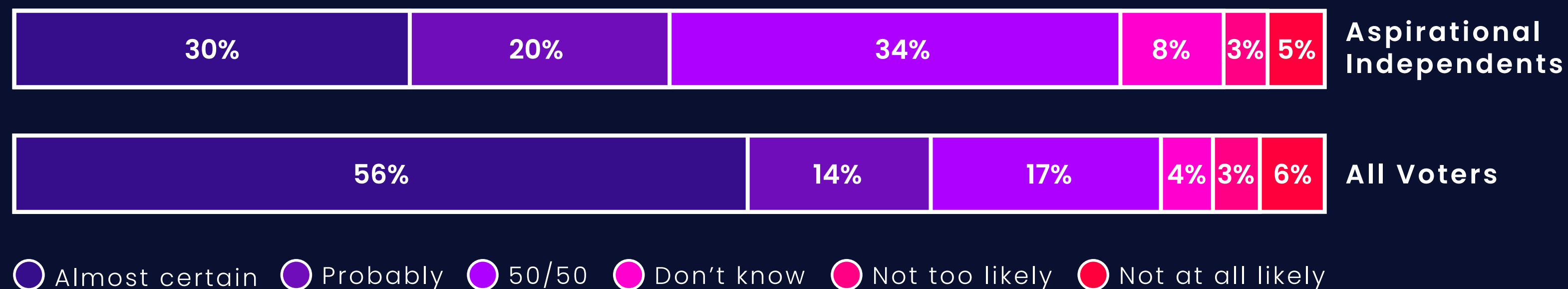
68% Agree

-  Somewhat Agree
-  Strongly Agree

Their hunger for policies that appeal to all is so strong that it registers as one of the top qualities they look for in political candidates. In other words, just the concept of compromise is nearly as powerful as stances on issues like the economy and health care.

This disillusionment means that turnout for this group is far from certain. They indicate far less enthusiasm for voting in the 2022 midterms than the country as a whole.

Likelihood to vote in 2022 midterm election



Retailers understand this cohort better than politicians and it shows:
69% of Aspirational Independents believe big retailers improve their quality of life, **68%** believe retailers pay their fair share in taxes and **71%** like politicians who make it easier for retailers to locate in their community, including warehouses.

Consequently, the policies and values that inspire them to vote center around the issues closest to them: cost of living, health care and compromise.

**Percent more likely to
vote for a candidate who ...**



A lesson for retailers:

Aspirational Independents like **action over policy**. In theory, a retail company showing some interest in the community and a responsibility to society is a good thing, but doing so in an overly aggressive manner raises flags for them and feels like bringing partisan politics into the store. They would rather companies highlight actions already taken rather than rhetorical promises.

Key Themes:

What We Heard

What It Means

Loyalty can be temporary

- Aspirational Independents seek the right mix of price, selection and customer service/employees. But these factors are currently fluid as they see changes in prices, selection and employee behavior.

- These shoppers are more aware of their options and know to evaluate them on a consistent basis. Retailers need to understand that shoppers can easily and regularly re-evaluate their favorite stores and brands.

Beware of the inauthenticity trap

- This group prides themselves on having informed opinions and stances. They are highly skeptical and have no problem disengaging if they believe a retailer or a politician is being disingenuous.

- Don't become a politician in terms of how you communicate to this cohort. They value authenticity and action much more than predictable positions on key issues.

Compromise is important and novel

- Many Aspirational Independents can't recall a politician who genuinely supported common-sense compromises. But they still think a candidate willing to compromise is certainly plausible.

- The ability to compromise is seen as fresh and a "change" to these voters.

Key Objective & Methodology

Objective: Uncover key value segments to both retailers and political campaigns, specifically looking for what shopping or political views and actions stand out for each.

1st Survey

- National survey of U.S. voters (n=2000) to identify and market size segments, Jan. 8 - 11

Segment Analysis

- Isolated data to politically non-committed (i.e., the 58% who do not “always” vote Democratic or Republican)
- Conducted factor and cluster analysis to find common lineages between segments based on shopping views

Focus Groups

- Held focus groups with Aspirational Independents and other groups

2nd Survey

- Fielded survey for deeper analysis among Aspirational Independents and other groups (n=1070), Jan. - Mar. 2022



SKDK is a top national communications and political consulting firm bringing unparalleled strategic communications experience to Fortune 500 companies, nonprofits, philanthropic organizations, and labor unions, as well as political committees and candidates. With offices in Washington, New York, Los Angeles, and Albany, SKDK offers strategic support to managing a crisis, protecting a brand, advocating an issue, or winning an election.



The National Retail Federation, the world's largest retail trade association, passionately advocates for the people, brands, policies and ideas that help retail thrive. From its headquarters in Washington, D.C., NRF empowers the industry that powers the economy. Retail is the nation's largest private-sector employer, contributing \$3.9 trillion to annual GDP and supporting one in four U.S. jobs — 52 million working Americans. For over a century, NRF has been a voice for every retailer and every retail job, educating, inspiring and communicating the powerful impact retail has on local communities and global economies.



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