

JAN2019



smartlab : REPORT

Working Moms control holiday shopping

DO YOU KNOW WHAT THEY WANT?

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Smartlab by Bellomy

Our proprietary panel is comprised of 2,600 respondents available for quick-turn research, including traditional surveys, video responses, online qualitative, and other techniques

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summary of findings



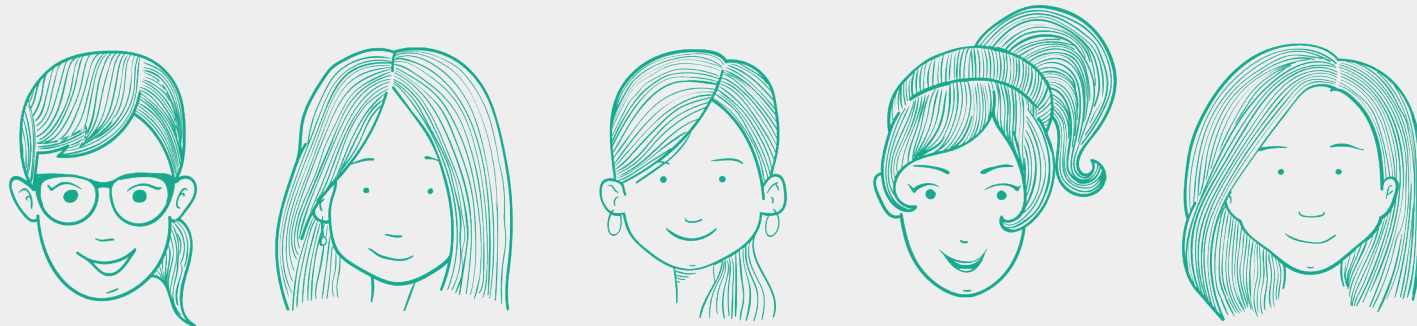
The intent of this study was to provide brands and retailers with insights they can use to increase their purchase rate with working moms during the holidays.

Working moms are the busiest of the busy, yet still control and are responsible for the majority of holiday shopping in their families. Since this group buys for an entire family they are extremely valuable shoppers. While they are the quintessential omnishoppers, they use social media as their secret weapon for efficient holiday shopping and enjoy doing so.

Not surprisingly, Facebook was the most commonly used platform. But Pinterest was also key, especially among those who log in daily and regularly contribute content. They find social media posts by retailers and influencers most impactful. Brands and retailers must prioritize these platforms and find ways to encourage posts by influencers.

Working moms search for holiday shopping ideas all year, so continuous messaging is important. They also recognize limitations of online, so you can't ignore in store. Armed with ideas from social media, their rate of planned purchases is higher, so you must get on their "nice list."

The study was conducted in multiple waves over the just-completed 2018 holiday shopping period.



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Consumers don't like to admit to being influenced by social media



However, those who do are more likely to be:



Mothers of two or more children: 68%



Working moms: 66%

Younger (<45): 68%



Mothers of younger children (youngest child <10): 64%



Everyone (almost) has a Facebook account—but pay attention to those on Pinterest, as well

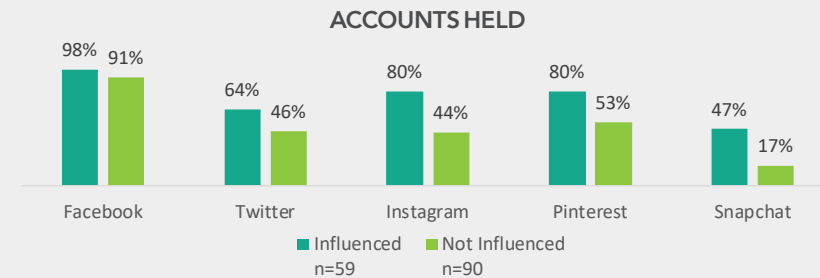


Those more likely to admit using social in their shopping were more likely to have accounts on Pinterest, Instagram, Twitter, and Snapchat (the vast majority of all participants have Facebook accounts).

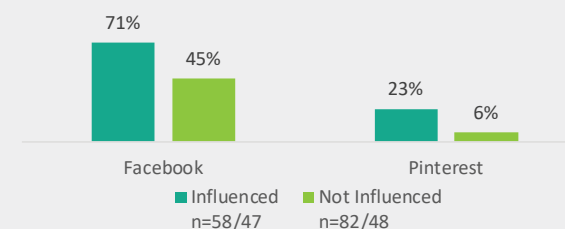
Not only do they have accounts on a variety of platforms, but they're more active on Facebook and Pinterest, logging in daily and contributing on most logins.

Activity on other platforms—Twitter, Instagram, and Snapchat—is nearly identical between groups.

What does this mean? Seeking consistent contributors on Facebook and Pinterest may be the most direct route to core social shoppers.



DAILY USERS who contribute during most logins



Social creates shopping efficiencies



Awareness of trending products
and times + locations of best deals
Social shoppers are more satisfied
shoppers (68% vs. 59% T3B Satisfied)

Reasons for shopping satisfaction:

- “ All but one of the gifts I ordered arrived on time and were what I was expecting in terms of quality. I like online shopping because it saves me time, I can find everything I am looking for, and checkout is fast and easy.” 45+, Working mom, three children, ages 6–15
- “ Did it calmly in my home, drinking coffee, with a smile ... ”
45+, Non-working mom, three children, ages 3–9
- “ I was able to find “just the right thing” for each person on my list.”
<45, Working mom, two children, ages 3 and 16
- “ Received everything I ordered—even some that said the item would not be sent until after Christmas.”
<45, Working mom, three children, ages 5–11
- “ Like purchasing and the deals I got online it was convenient and I feel I saved money and got unique gifts this way.”
<45, Working mom, two children, ages 14 and 17

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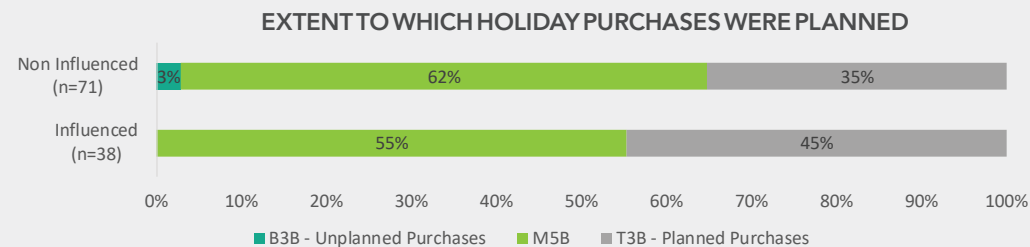
Those influenced by social make more planned purchases



This may seem counterintuitive.

But it speaks to social media's ability to prime shoppers with purchase ideas, making them feel like they're making planned purchases

The group of social-influenced shoppers is also slightly more likely to go over budget than non-influenced shoppers



Posts from retailers and influencers have the most clout

Moms 45+ tend to give the most importance to social posts from retailers

Moms under 45 are all ears to influencers



In support of retailers:

- “ Because I have been shopping with them for years.”
45+ Non-working mom, 14-year-old child
- “ Because they reach out to the consumer to give them the best deal possible and tell them of all the good deals.”
45+ Non-working mom, 16-year-old child
- “ I trust reviews that they post from verified buyers.”
45+ Working mom, 15-year-old child

In support of influencers:

- “ These are usually the people who have tried the products and can account for how well they work.”
<45, Working mom, two children, ages 5 and 11
- “ When they review something poorly. If they give something a bad review, I’m more likely to trust that they are being honest with their opinions.”
<45, Working mom, three children, ages 5–13
- “ Most of the accounts I follow live for these deals and they post about the best ones all weekend. It saves me time—they do all the work for me.”
<45, Working mom, 15-year-old child

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Moms listen for gift cues throughout the year to give the best, most thoughtful, useful gifts

No retailers compare to Amazon's "Save for later" feature when it comes to keeping track of gift ideas. Some also rely on the "notes" feature in their phones to remember ideas



“ I listen throughout the year. I listen for when they ask for something they see on TV or in stores. I usually go to Amazon and find it and then add it to my 'save for later' cart. By the time Xmas is here, I have hundreds of 'save for later' items I can browse through! No one does it like Amazon. Kohls has a save option but you have to assign it a list and it isn't right below your shopping cart. I think a lot of retailers do it that way: you have to assign it to a wish list or such and give it a name—too many steps!”

45+, Non-working mom, two children, ages 7 and 13

“ Most of the people I buy presents for I have regular, ongoing contact with them so I know what they are excited about right now, what they are still interested in but haven't done anything with for a while, and the kind of things they always like but never buy for themselves. When I'm keeping a list throughout the year I tend to do it in the notes section of my phone. As soon as they start talking about something they want, I make a note. Since it is on my phone it is with me whenever I go to store, or I can glance through it before I start my online shopping to see what's on there that might not be on their Amazon wish list.”

<45, Non-working mom, one-year-old child



Prime Day? More than a blip on the radar

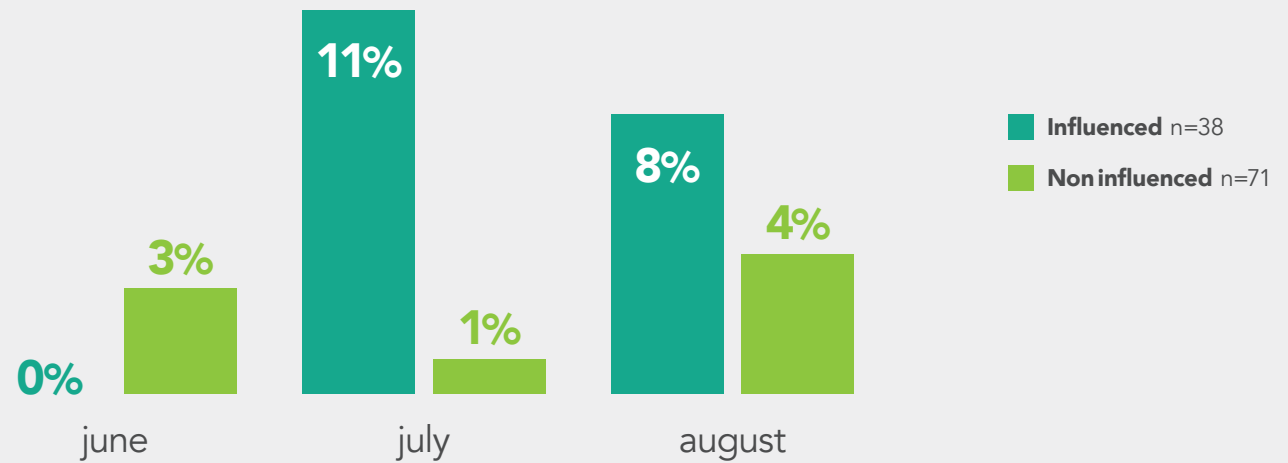


Most shoppers start holiday shopping in October/November. However, 11% of social influenced shoppers made their first purchases in July (as compared to 1% of non influenced).

Our thoughts? Prime Day is making an impact—even months before the traditional holiday season starts!



When holiday shopping began
2018 Prime Day was Tuesday, July 17th



Social has its limitations



Consumers can't touch/feel/try on anything before purchasing

“ I'd love to see more video reviews of products, especially clothing, so I could actually see how the items look being worn and hear from a real person how they fit/feel!” <45, Working mom, three-year-old child

“ I think it would really help if companies offered interactive shopping guides on social media. As a consumer, I really want to be able to touch and feel the product before going out and purchasing it. However, that would be really difficult to do online. I think some type of guide on social media would help me accomplish my goals. 45+, Working mom, two children, ages 14 and 16

Ideas and suggestions are geared toward the account holder and not gift recipients

“ I would have to follow different people, who are similar to those who I would be buying for. I have no interest in doing this, as I follow people who have similar interest to myself. I do not think social media would help much at all. <45, Working mom, three children, ages 5–13

Browser cookies leave crumbs and eliminate the element of surprise for families who share computers

“ What would be really helpful would be if the items I have been looking at or ordered didn't show up on my family's news feeds. It got to be a joke—but I wasn't amused—when my kids would say, 'Hey, mom: I hope you got me the 'green' shirt I wanted' because they saw it when they went online. So if they could somehow separate the accounts that are used by all the computer users in a household, that would be awesome.” 45+, Working mom, three children, ages 6–15

There's a lack of trust

“ Unsure, really, with so many spoofs, viruses, people trying to scam you, I don't know that I will really trust it.” 45+ Working mom, one child, 15

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Who we talked to for this report:

149 Moms

<45: 59%
45+: 41%

81% Married

One child: 42%
Two or more children: 58%

Youngest child <10: 53%
Youngest child 10+: 47%

Working moms: 58%
Non-working moms: 42%

Validation for research:

Households with children are more likely
to participate in holiday shopping than
those without children (97% vs. 87%)

Mom manages and conducts the
holiday shopping in 73% of households
with children

Over half of moms have a part- or full-time
job and consider themselves to be working
moms (57% working, 43% non)

The logo for Bellomy, featuring the word "bellomy" in a lowercase, teal-colored, sans-serif font.



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Bellomy's Smartlab panel—or your own proprietary panel we create for you—can be used for deeper and more customized insights

Contact Bellomy at info@bellomy.com /// 800.443.7344

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