

# COUNT THE WAYS SCARBOROUGH RESEARCH AND ARBITRON CAN HELP YOU

- #10 **You're now an expert on local business trends.**  
Scarborough's local market insights have given you in-depth knowledge about your local market.
- #11 **Now the corporate softball team**



## Shopping Insights on Today's Working Mom

*Presented by Howard Goldberg*

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# What We Are Covering Today

- About Scarborough's Working Mom Findings
- Why should you care about the Working Mom?
- Shopper Insights
- Effective Multichannel Marketing
- Turn Insights Into Action: Applications



## About Scarborough

- Scarborough Research is a leading consumer and media measurement company
- Scarborough is used by agencies, marketing, media companies, and sports organizations for buying and selling of media, sponsorship, and other consumer insights.
- Utilizing our local study of more than 4,000 adults, we examined the “Working Mom”
  - » Defined as “Women who are employed full-time and have one or more children in the household”
- The Working Mom target was crossed against Scarborough’s robust consumer measurements to pinpoint their shopping patterns, lifestyles, demographics and media behaviors
- The collection timeframe for the data in this presentation is March 2009 through February 2010. Data released May 2010.

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## Why Should You Care About Working Moms?

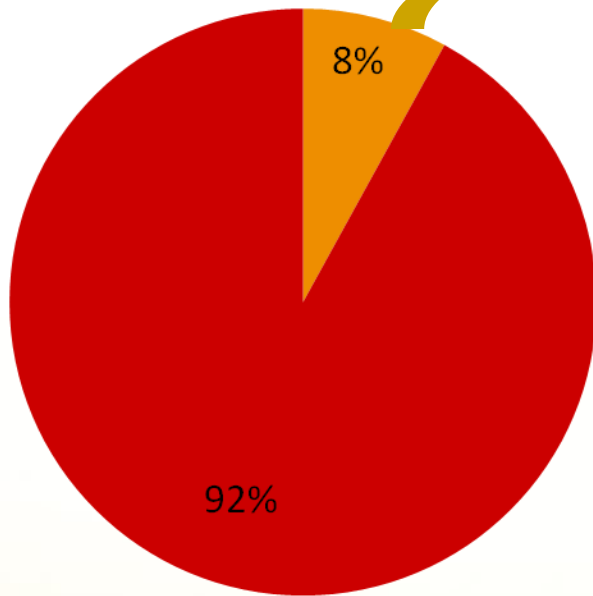
*Background and Demographics*





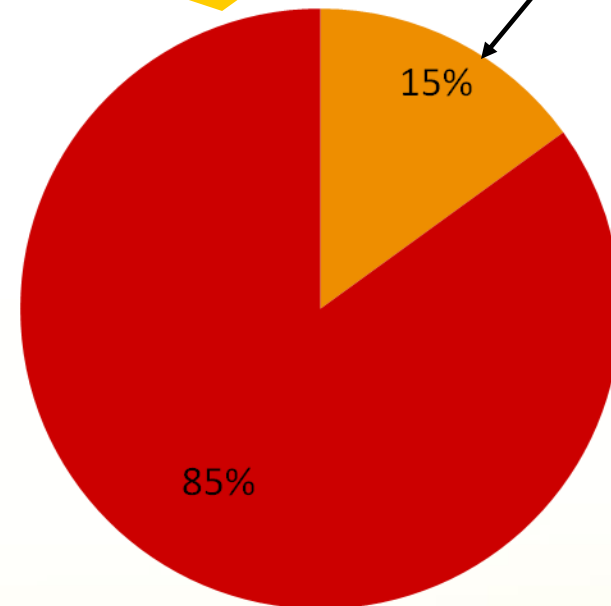
# There are 581,000 Working Moms in the Chicago DMA

Working Moms Account for 8% of the Chicago Adult Population



■ Working Moms ■ Chicago Adults

Working Moms  
Account for 15% of  
Total Chicago Women



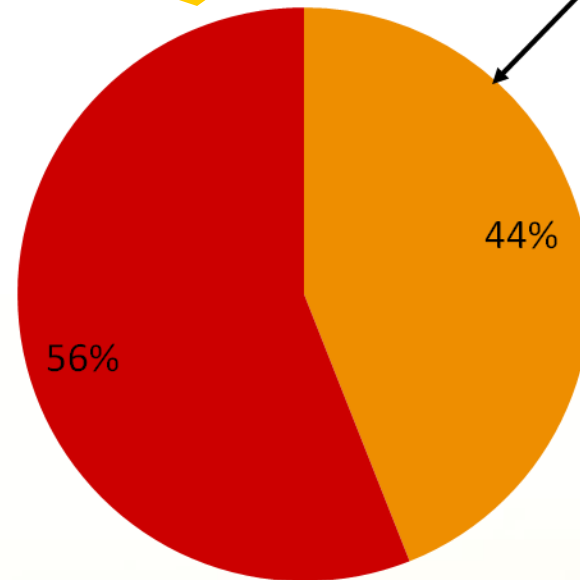
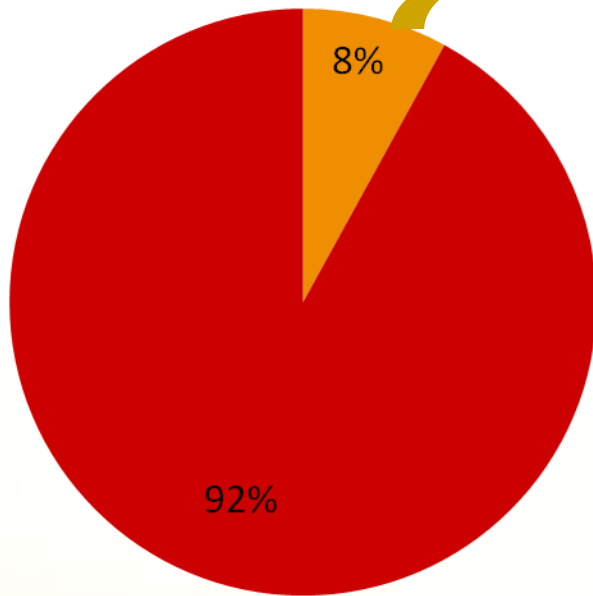
■ Working Moms ■ Working Women



# There are 581,000 Working Moms in the Chicago DMA

Working Moms Account for 8% of the Chicago Adult Population

44% of Working Women are Full-Time Working Moms



■ Working Moms ■ Chicago Adults

■ Full-Time Working Women Who have Children  
■ Full-Time Working Women Who do not have Children



## Working Moms are a Sizable Shopping Group,

- Disposable income:
  - » Average adult annual HHLD Income: \$80,000
  - » Working Moms: \$91,000
- At 69%, two-income households are more the norm
- Further, there are many high-profile Working Moms in society who set the trend for family-oriented products & services





## Distinctive Demographics Marketers are Taking Notice

- **AGE:** Working Moms tend to be in their 30's and early 40's
- **EDUCATION:** They are more likely to be well-educated, having 4-year college degrees or greater
  - » In fact, they are 20% more likely than the average adult to have a post-graduate degree
- **MARITAL STATUS:** They are 15% more likely to be married

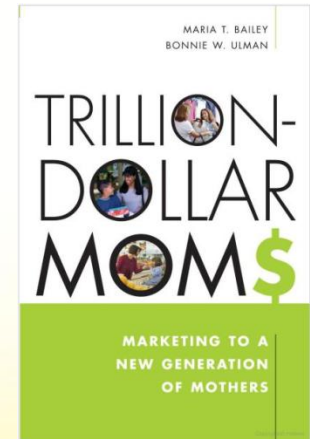
MediaPost **BLOGS**

# Engage: Moms

Home > Engage: Moms

### Brands Create Offline Experiences For Online Moms

by [Lindsay Maines](#), Wednesday, April 8, 2009, 12:30 PM



### The Best Cities For Working Mothers

Heidi Brown, 08.04.09, 05:00 PM EDT

Working moms want to live in the best place for their kids, careers and quality of life.

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## Working Mom Shopping Insights

*Feeding, clothing, and making a home for the family  
(And making sure they have cool stuff!)*



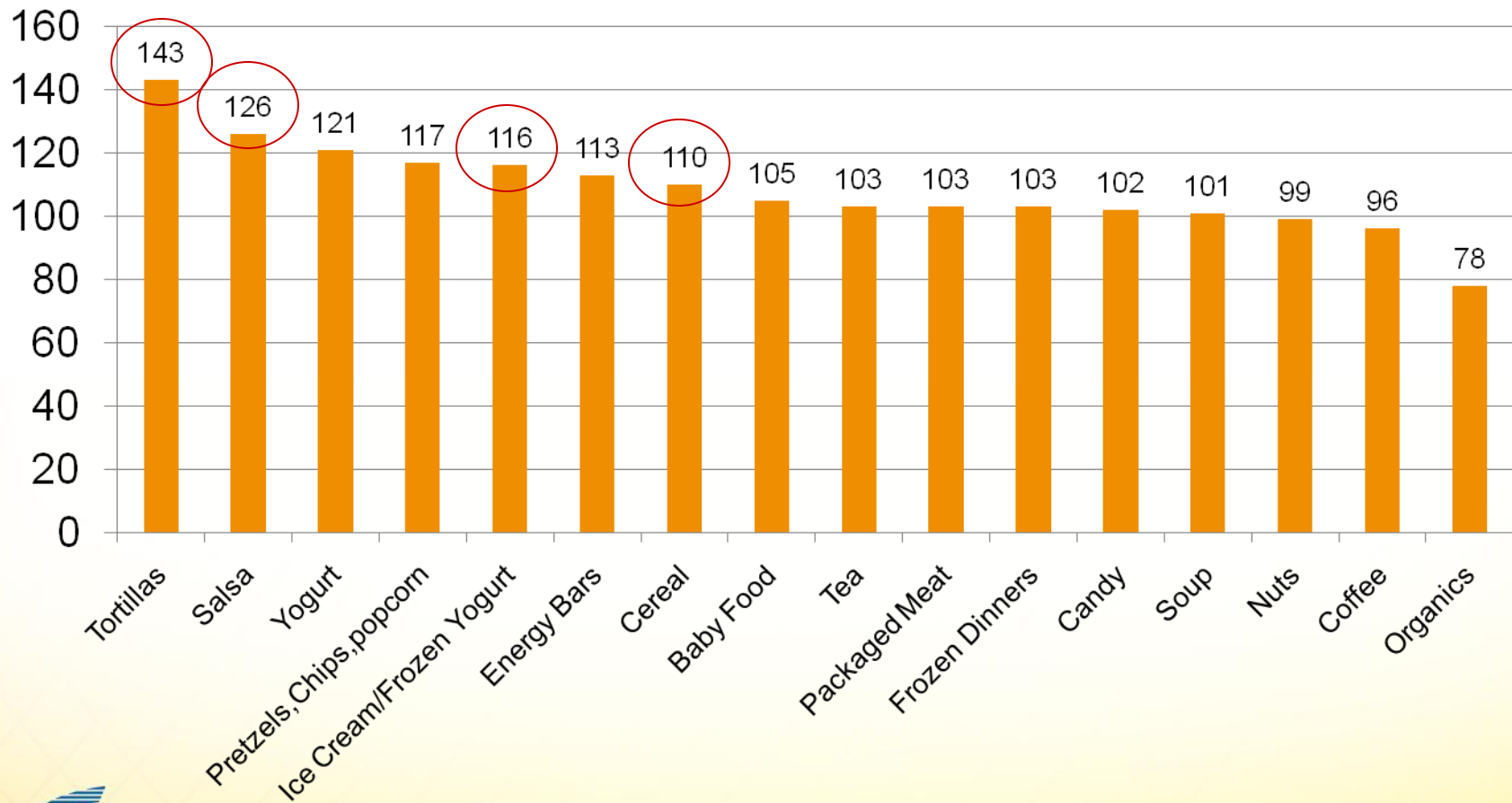


# Feeding the Family: The Grocery Spend

- Weekly Grocery spend is 10% higher than the Chicago average
  - » Working Moms: Household spends \$136 per week on groceries
  - » Chicago Average: \$124
- Two out of three Working Moms use grocery coupons monthly;
  - » 30% use them weekly
- Working Moms are 23% more likely than the average adult use the internet to download coupons.
  - » 19% access coupons via e-mail or texting with a mobile device



# Feeding the Family: Consumer Packaged Goods Fill the Grocery Cart

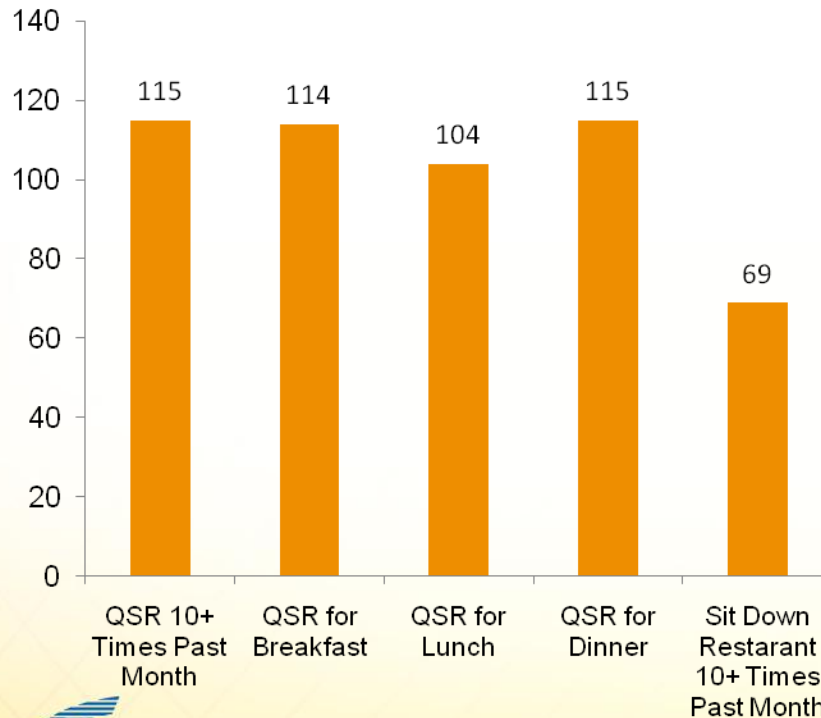




# Feeding the Family: Restaurant Usage

## Restaurant Usage

Working Mom Index vs. Total Population



## Top Five QSRs for Working Moms

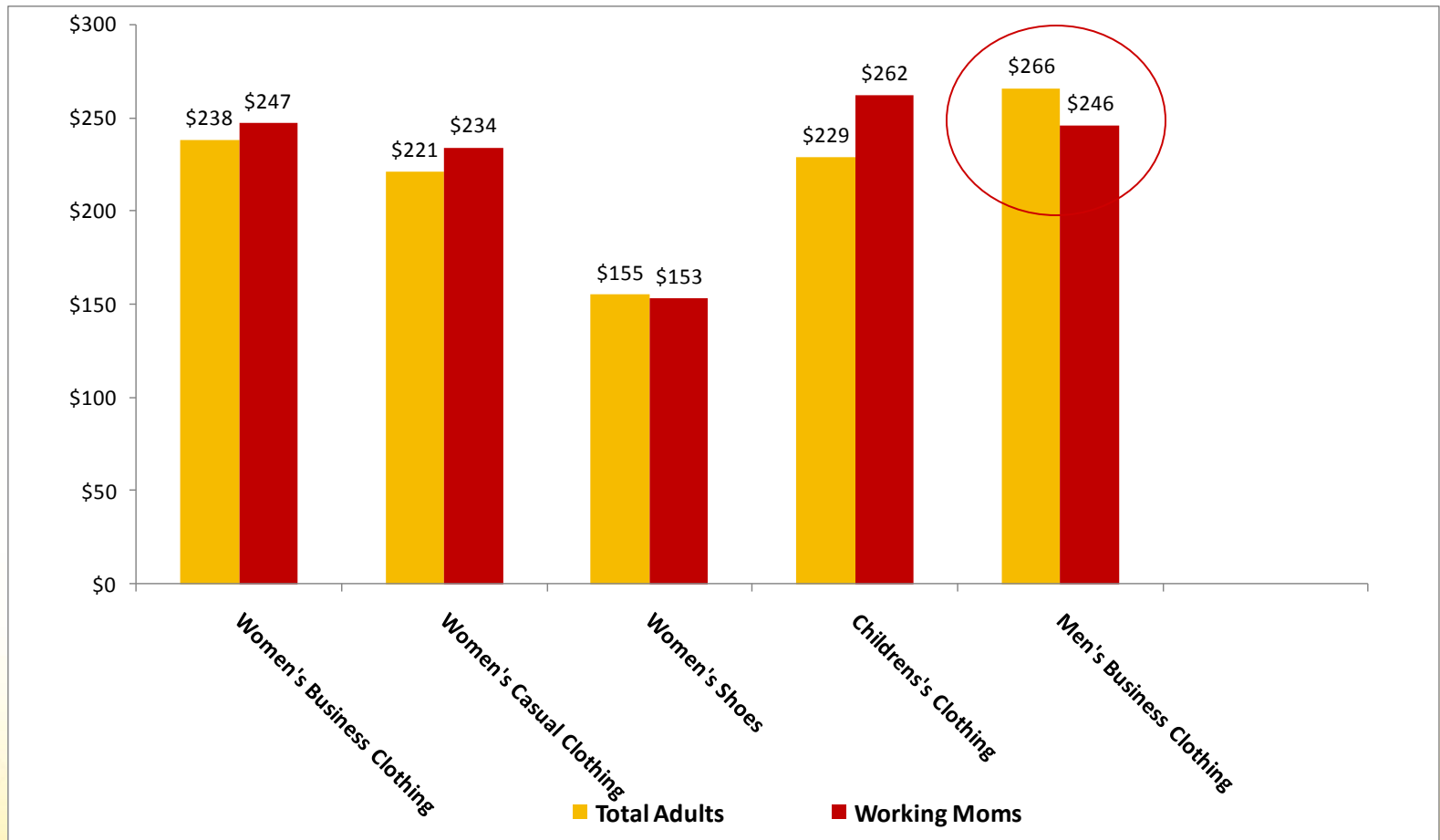
(Past 30 Day Usage)

1. McDonald's: 70%
2. Subway: 35%
3. Burge King: 30%
4. Dunkin Donuts: 26%
5. Wendy's: 25%



# Clothing the Family: Spending More Annually

## Average Amount Spent on Clothing Purchases, Past Year





# Clothing the Family

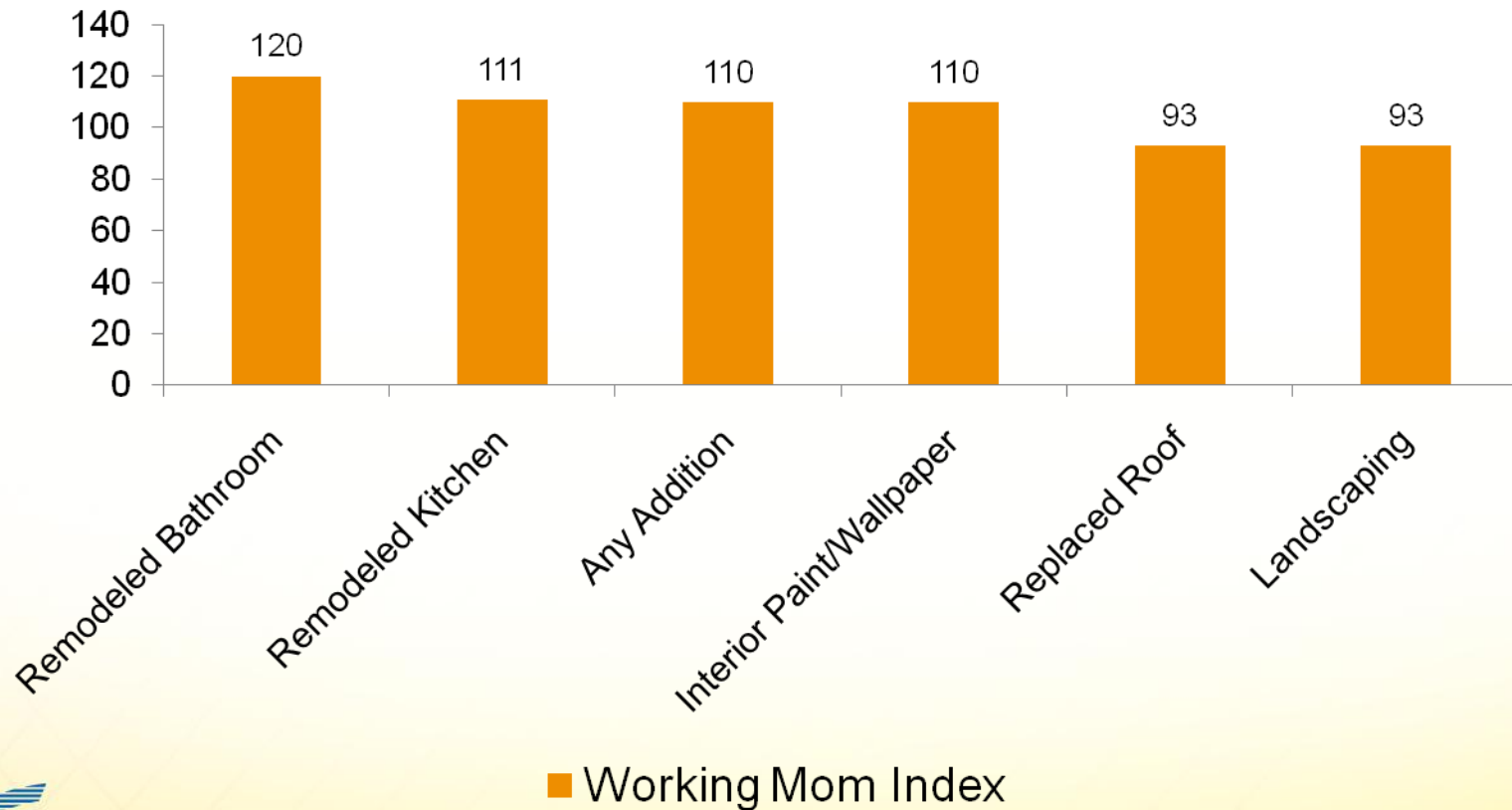
Store	% of Working Moms Who Shopped for Clothing Past 3 Months	Working Moms Index (vs. total population)
Target	53%	145
Wal-Mart	51%	141
Kohl's	49%	141
JCPenny	29%	130
Macy's	21%	152
Old Navy	20%	148
Sam's Club	19%	180
Sears	17%	128

Cross-shopping?  
 More to come...



# Making a Home: Chicago Working Moms: Keeping Their Holmes New

## Home Improvements Past Year





# 68% of Working Moms Shopping at Any Home Improvement Store

## Making a Home: Home Improvement Stores Shopped

### Working Moms

Spend Avg: \$500/household  
at Home Improvement  
Stores/year

Spend Over \$1.3  
Billion/year in Chicago on all  
Home Improvements

Store	% Working Moms Shopping @ Home Improvement Stores
Home Depot	32%
Menards	32%
Lowe's	22%
Wal-Mart	20%
Ace Hardware	19%



# Cross-Shopping: The Walmart Example

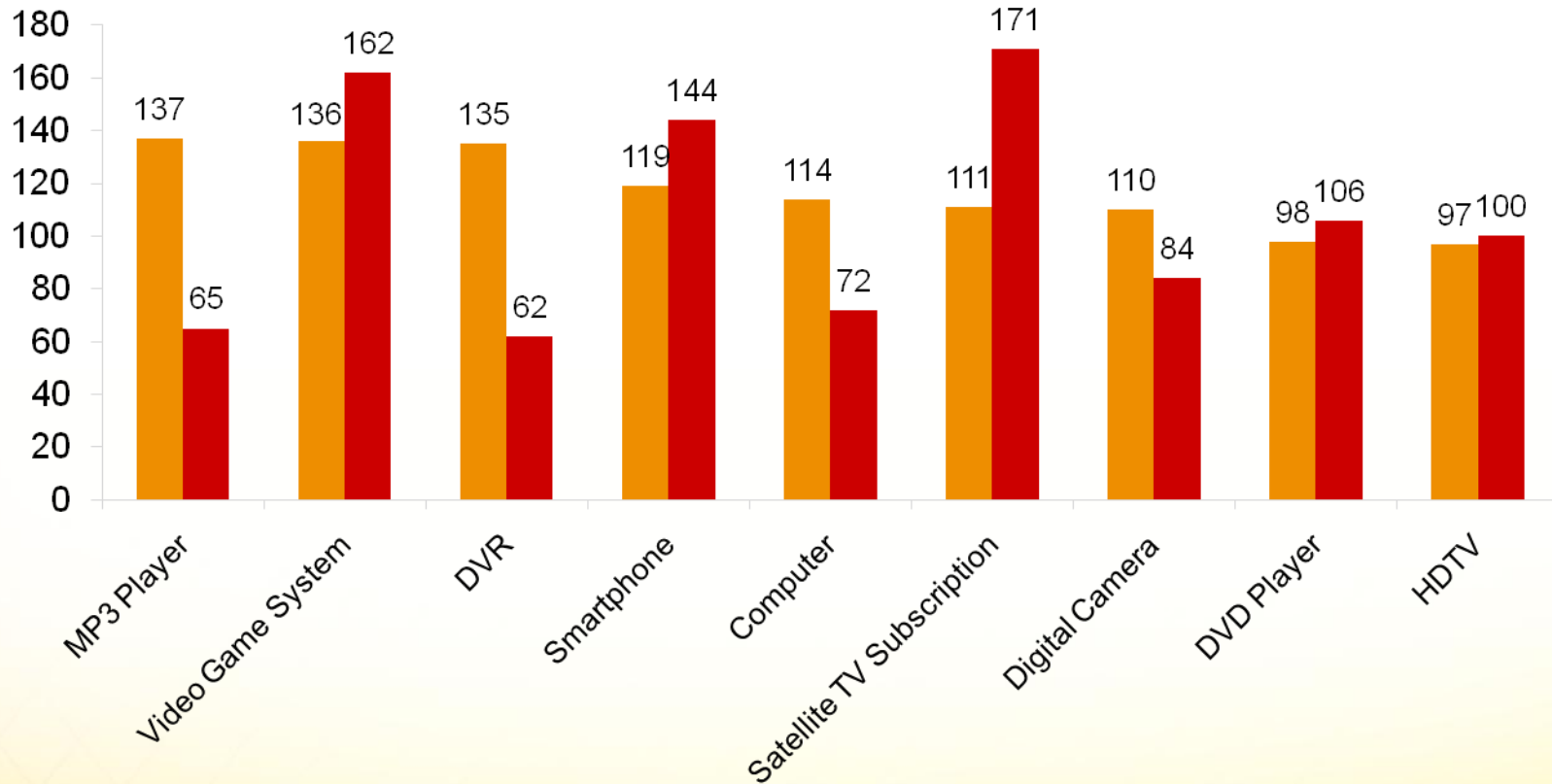
Department	% of Walmart's Working Mom Shoppers already purchasing hardware	Working Mom Index (vs. all Walmart shoppers)
Non-Prescription Health/Beauty Items	77%	216`
Home Accessories	75%	183
Clothing	72%	173
Audio/Video	60%	301
Pet Supplies	59%	323
Groceries	59%	215
Books	47%	178
Office Supplies	46%	234
Toys	38%	181
Prescription Drugs (Rx)	37%	339
Auto Supplies	29%	250

- Working Moms shop Walmart for a wide variety of goods
- But there is room to grow: Prescription Medications, Auto Supplies.



# Cool Stuff: Keeping the HHLD Updated with Technology

## Household Technologies (Index)



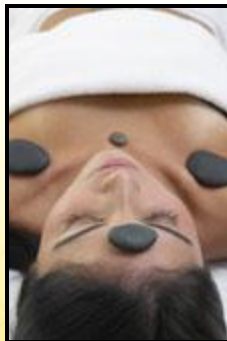
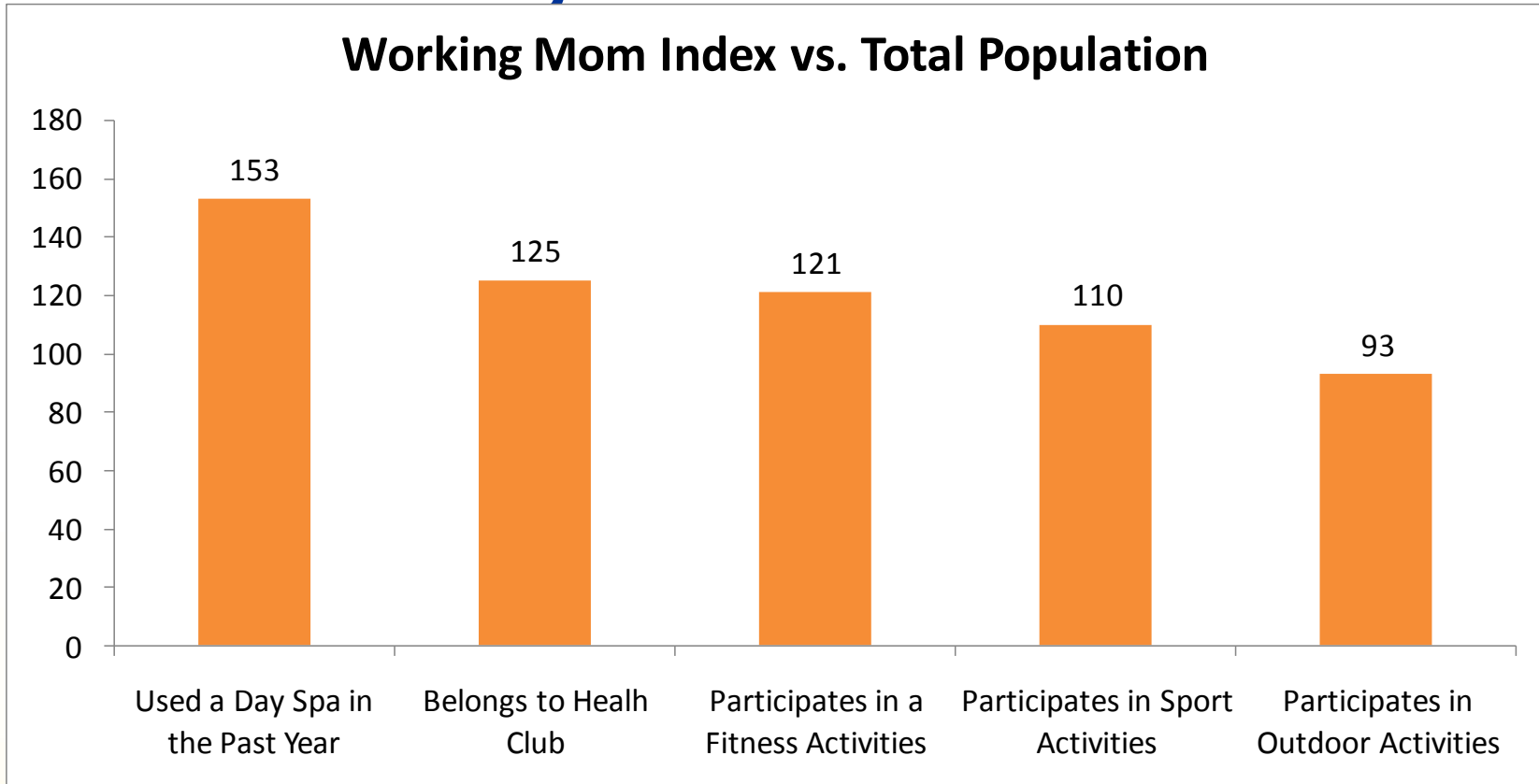
■ Working Moms who OWN in HHLD

■ Working Moms who PLAN TO BUY in HHLD



# And when the day is done...Me Time

## Working Mom Index vs. Total Population



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## Multichannel Marketing

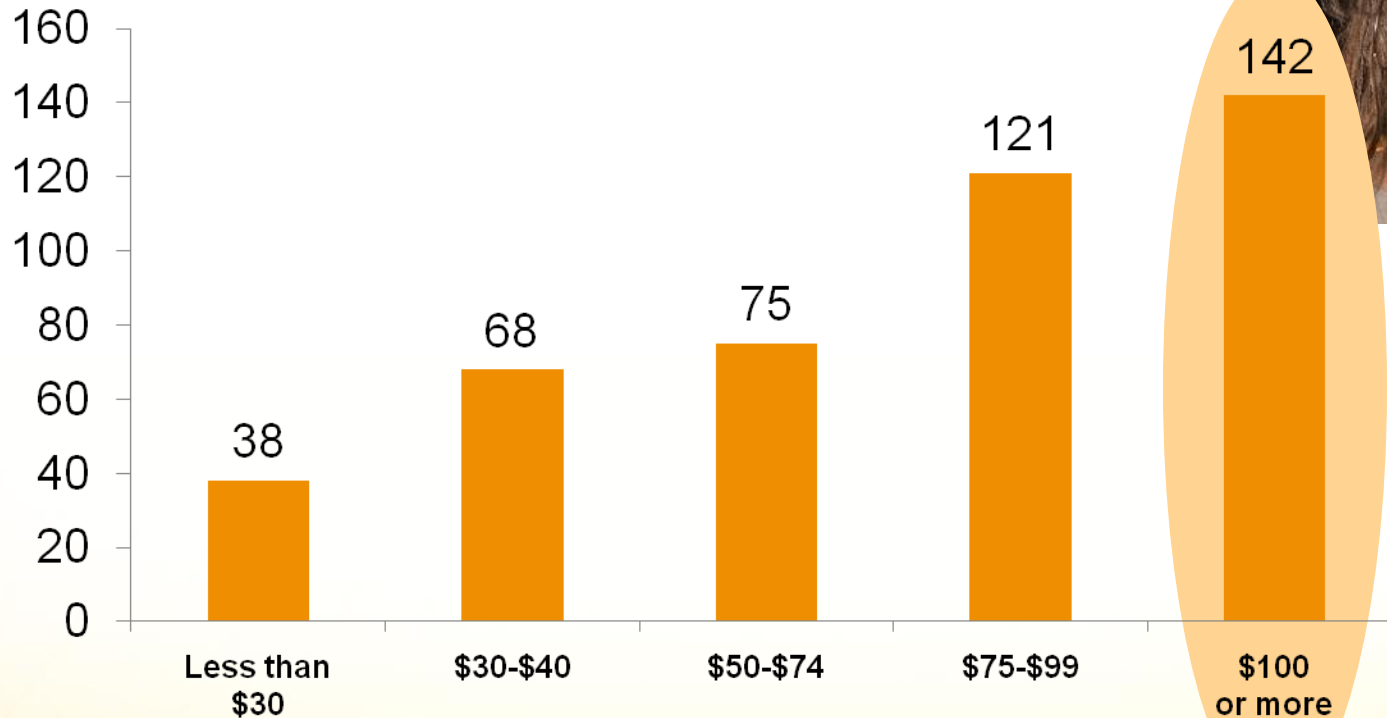
*How to Reach the Working Mom*





# Working Moms are Mobile Marketing Targets

## Cellular Phone Bill Past Month



### Working Moms Index vs. Total Cellular Users

**QUICK FACT:** The average cellular bill for the Working Mom is \$98.97 – which is 20% higher than the Chicago cell user average.



# Online Activities are Focused on Utility, So Serve Them Relevant Info

## Hot Categories (Top Indexers)

Way Internet Used Past Month	Online Working Moms Index
Photo Processing	194
Social Networking	133
Pay Bills	127
Download Coupons	125
Listen To Radio Station	119
E-mail	116
Real Estate Listings	113
Local Community Events	112
Weather	109

## Lukewarm Categories (Average Indexers)

Way Internet Used Past Month	Online Working Moms Index
Medical Services	106
Travel Reservations	104
White/Yellow Page Search	101
Job/Employment Search	101
Personal Ads/Dating	98
Movie Listings	96
College Courses	96
Instant Messaging	91
Listen to Internet Radio	89

## Cold Categories (Bottom Indexers)

Way Internet Used Past Month	Online Working Moms Index
Visit Cable TV Site	85
Download/watch Movies	74
Consumer Reviews	70
Local/National News	69
Video Games	60
Auction Site	59
Financial Services	54
Casino Games	51
Blogs	46



# Online Purchases Also Reflect Utility, Convenience Focus

## Hot Categories (Top Indexers)

Items Bought Online Past Year	Online Working Moms Index
Furniture/Home Furnishings	208
Toys & Games	178
Clothing/Accessories	134
Health/Beauty Items	126
Pet Supplies	126
Books	108
Other Travel Reservations	101

## Lukewarm Categories (Average Indexers)

Items Bought Online Past Year	Online Working Moms Index
Airline Tickets	99
Groceries/Candy/ Other Food	99
Medicine/Prescription	99
Sporting Event Tickets	99
Music Files (Napster, itunes)	98
Movie Tickets	92
Office Supplies	90
Cultural Event Tickets	86

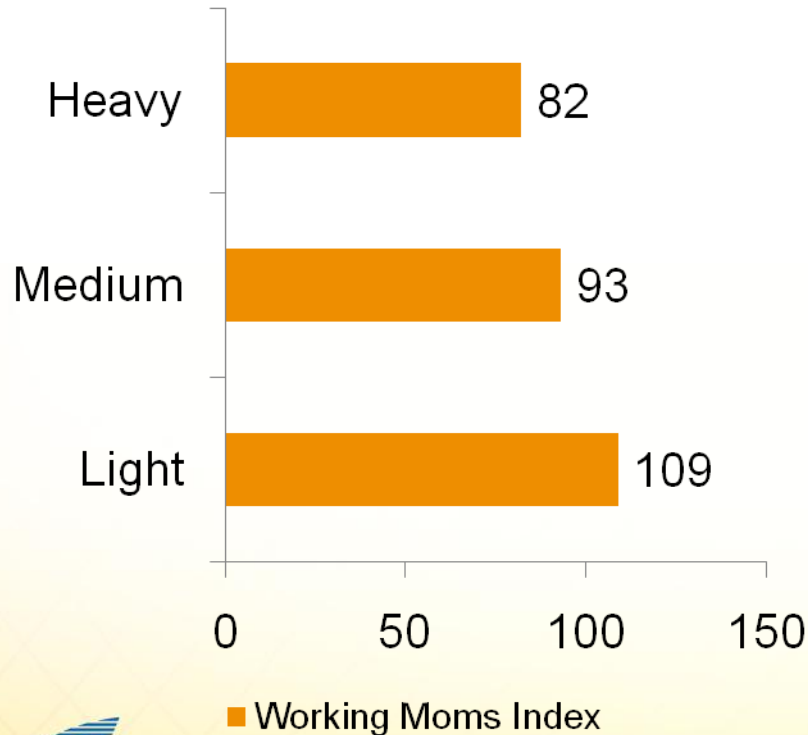
## Cold Categories (Bottom Indexers)

Items Bought Online Past Year	Online Working Moms Index
Flowers	63
Consumer Electronics	62
Wine	62
Consumer Hardware	49
Compact Discs	39
Insurance	35
Vehicle	32



# Out-Of-Home Media Profile of the Working Mom

## Out-of-Home media Quintile



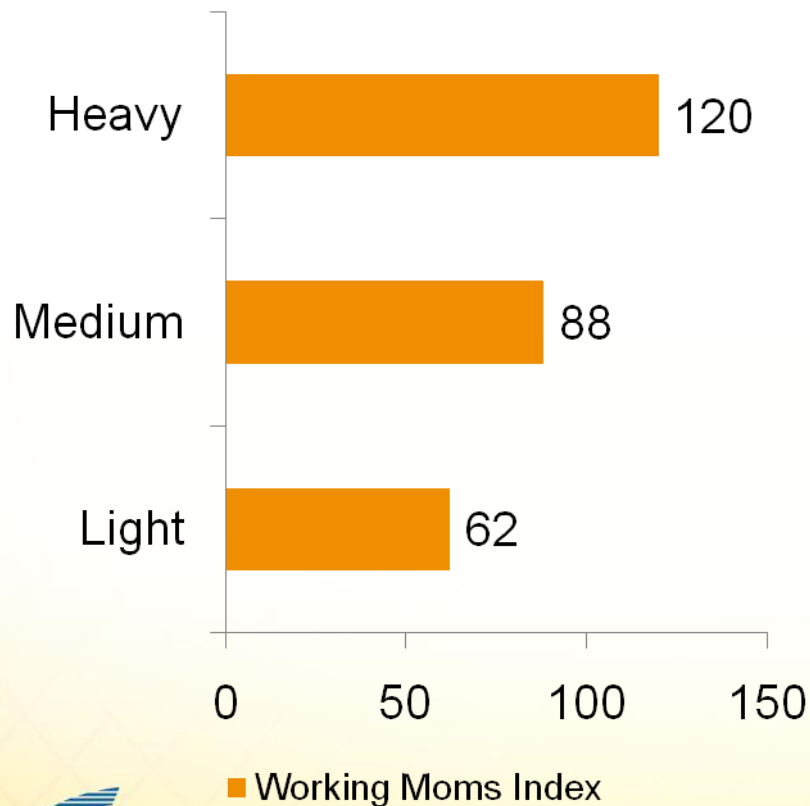
## Working Mom's Commute Times

	% of Working Moms Who ...	Working Moms Index
Spend 30 – 60 minutes traveling one way to work	28%	148



# Radio Profile of the Working Mom

## Radio Quintiles



## Top Radio Formats for Working Moms

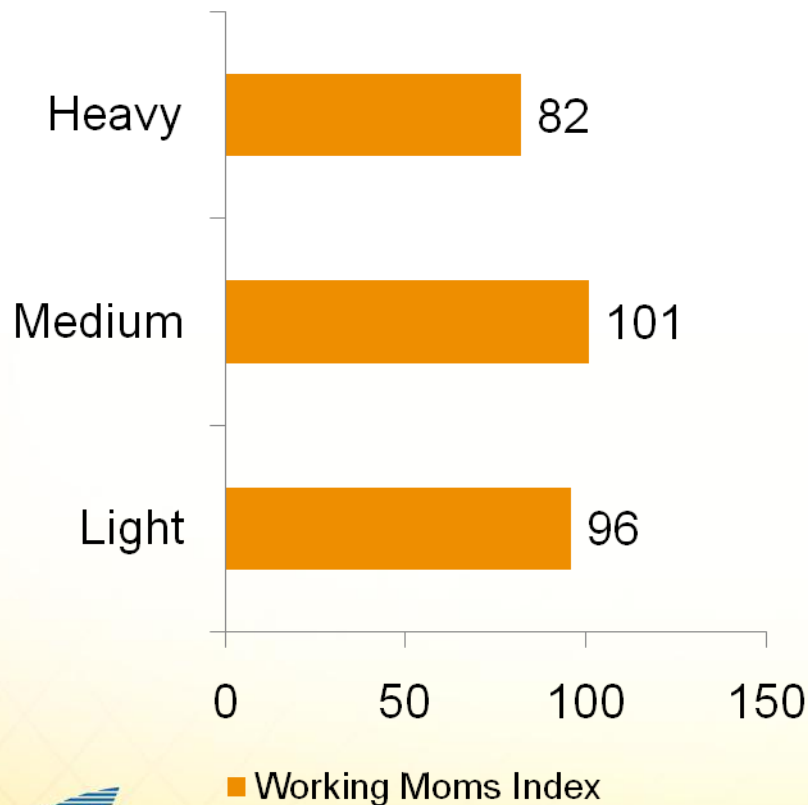
(% Composition)

1. Adult Contemporary: 57%
2. Modern AC: 38%
3. Rhythmic CHR: 31%
4. Pop CHR: 30%
5. Country: 27%



# Television Profile of the Working Mom

## Television Quintiles



## Top Television Genres for Working Moms

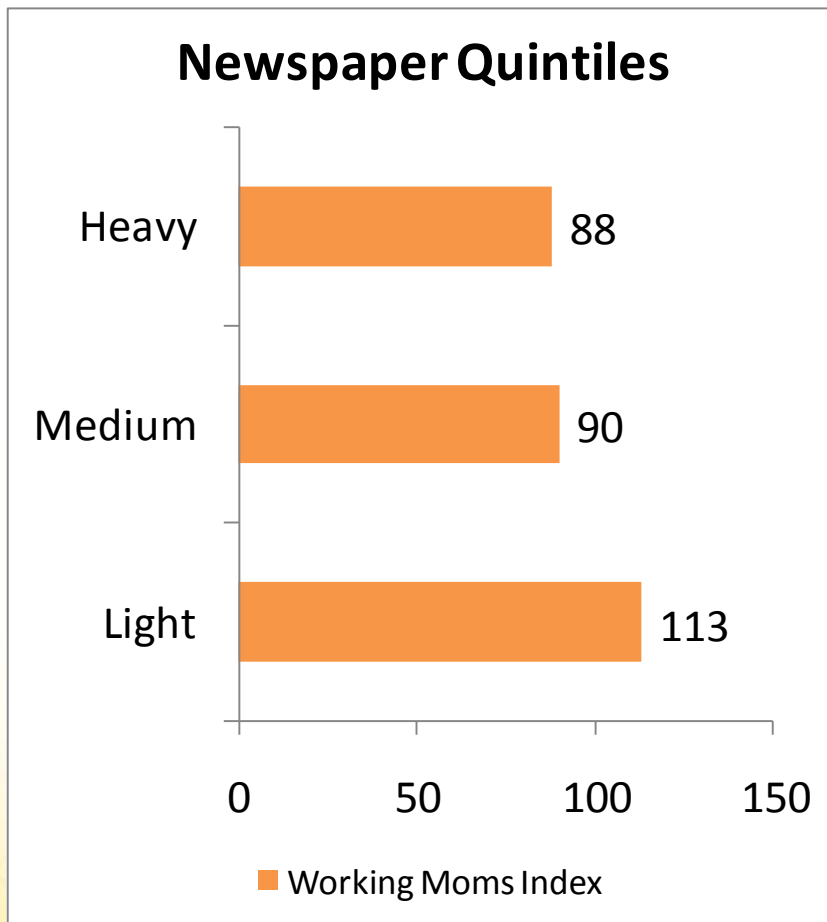
(% of Working Moms Who Watch)

1. Comedies: 59%
2. Movies: 55%
3. Morning Local News: 45%
4. Evening Local News : 41%
5. Dramas: 38%

48% of Working Moms visited a Broadcast Television Website during the past month.



# Newspaper Profile of the Working Mom



### Newspaper Readership Details: Online

	% of Working Moms Who ...	Working Moms Index
Visited Newspaper website past month	31%	106

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## Turning Insights Into Action

*What does all of this mean?*





# The Chicago Working Mom has Spending Power, Relevance

- Highly Desirable Target Group
  - » Account for 581,000 consumers with above average income
  - » Control over spending for the family as well as themselves
  - » Influence brand preference for children and spouse
  - » Working Mom's in this target group for a longer period of time
  - » Better return on objectives for marketing and branding strategy
- Mom's are taking care of three basic necessities: Feed, clothe and shelter the family
  - » Need to find ways to cross-market and thread a companies brand through the fabric of the Mom's life.



# Working Mom's Basic Needs

- Cost Savings, Time Efficiency, and Healthy Choices are important to the Working Mom
  - » Are you also thinking about the eco-conscious Working Mom?
  - » There is opportunity for businesses to cross-market products/services, further helping the Mom's busy schedule
- Working Moms are Tech Savvy
  - » Opportunity still remains for further integration of digital's benefits into the Working Mom's day: mobile devices, couponing, content for the small screen
- Mom takes care of her mom responsibilities and finds time for "Me Time"
  - » Find ways to connect with mom's "me time" - promotions, products, messaging

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## Thank you to all our Working Moms!

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