

Scarborough has your data covered.

# 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

A Complimentary Report from Scarborough Research and Arbitron Inc.  
September 2009

[www.scarborough.com](http://www.scarborough.com)

[www.arbitron.com](http://www.arbitron.com)





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*This complimentary report is based on a webinar on the Working Mom delivered by Scarborough on September 18, 2009. The recorded webinar is available for download free of charge:*

<https://www2.gotomeeting.com/register/491487746>



## About Scarborough

- Scarborough Research is a leading consumer and media measurement company
- Utilizing our national study of more than 220,000 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 data in this analysis is from Scarborough’s USA+ Study (Release 1 2009, data collection timeframe February 5, 2008 through March 7, 2009)

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## Why Should You Care About Working Moms?

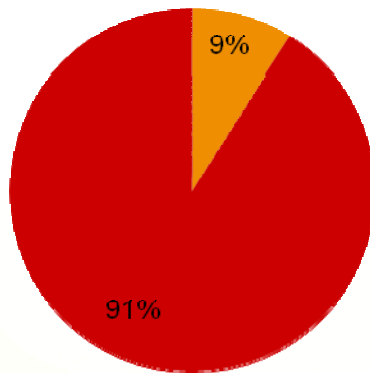
*Background and Demographics*





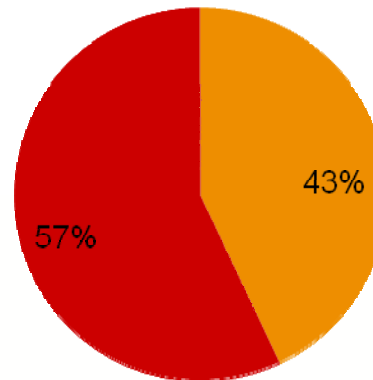
# There are 21.6 million Working Moms in the United States

Working Moms account for 9% of the U.S. Adult Population



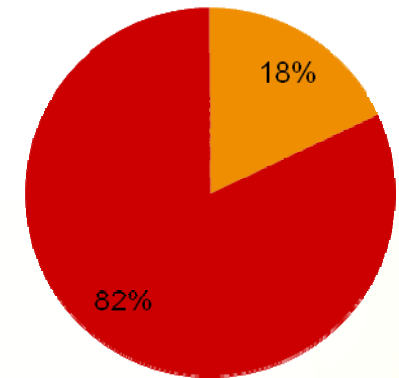
■ Working Moms ■ Total U.S. Adult Population

43% of Working Women are Full-Time Working Moms



■ Full-Time Working Women Who Have Children  
 ■ Full-Time Working Women Who Do Not Have Children

Working Moms account for 18% of All Women



■ Working Mom ■ Total U.S. Women



SOURCE: Scarborough Research, Scarborough USA+ Study, Release 1 2009





# Working Moms are a Sizable Shopping Group, Necessity

- Disposable income:
  - » Average adult annual HHLD Income: \$73,400
  - » Working Moms: \$81,900
- At 58%, 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 15% more likely than the average adult to have a post-graduate degree
- **MARITAL STATUS:** They are 13% more likely to be married

MediaPost **BLOGS**

## Engage: Moms

Home > Engage: Moms

### Brands Create Offline Experiences For Online Moms

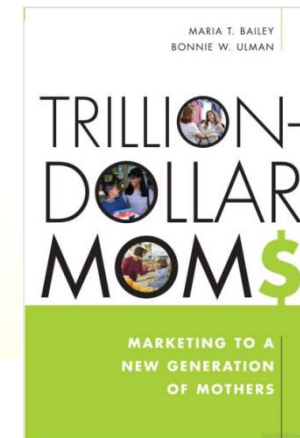
by [Lindsay Maines](#), Wednesday, April 8, 2009, 12:30 PM

**Forbes**  
U.S. EUROPE ASIA

### 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.





# Local Distinctions

## 12% of Honolulu and Des Moines adults are Working Moms, but they have demographic differences

Top Five Local Markets (DMAs) for Working Moms

- Honolulu: 12%
- Des Moines, 12%
- New Orleans: 12%
- Kansas City: 11%
- San Antonio: 11%
- **National Average: 9%**

Bottom Three Local Markets (DMAs) for Working Moms

- Knoxville: 7%
- Greenville: 7%
- Pittsburgh: 6%

### Honolulu Working Moms vs. Des Moines Working Moms: Demographic Profile

Demo	Des Moines	Honolulu
Average Age	38	39
Own Home	88%	64%
One or More Teens at Home	43%	60%

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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 household grocery spend is 16% higher than the national average
  - » Working Moms: Household spends \$140 per week on groceries
  - » National Average: \$121
- Two out of three Working Moms use grocery coupons monthly; 28% use them weekly
  - » Working Moms are 46% more likely than the average adult to get coupons from email/text messages
  - » 49% more likely to get them from the Internet

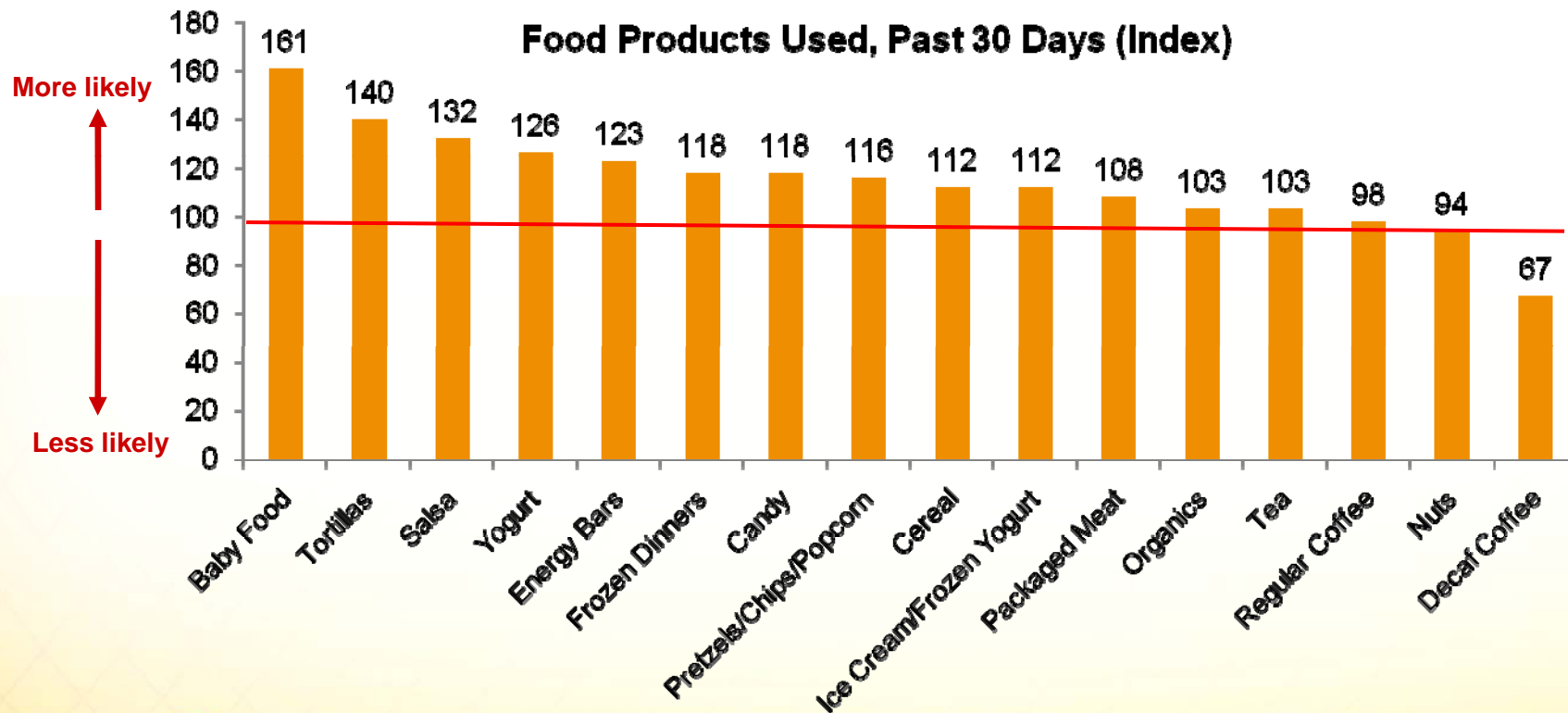


# Feeding the Family:

## Consumer Packaged Goods Fill the Grocery Cart

Product convenience, time savers are important

Convenience and time savings are the themes of the grocery cart. CPG companies should continue to emphasize this in product development and packaging

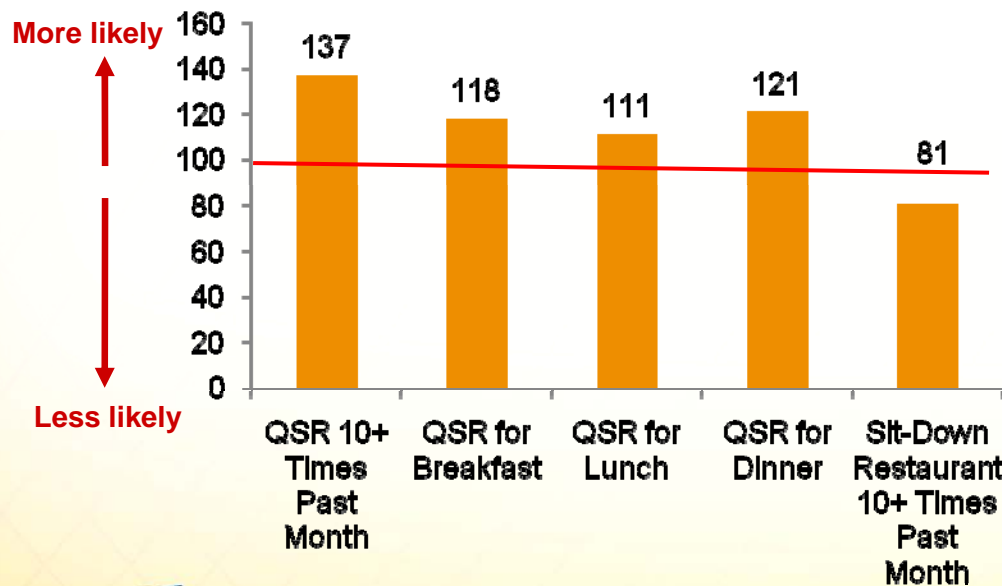




# Feeding the Family:

Restaurant Usage – Working Moms also rely on the convenience of fast food, utilizing QSRs at different meal times throughout the day

## Restaurant Usage Working Moms Index



## Top Five QSRs for Working Moms

(Past 30 Day Usage)

1. McDonald's: 58%
2. Subway: 33%
3. Taco Bell: 29%
4. Burger King: 27%
5. Wendy's: 27%

**MARKETING IDEA:** QSRs should market cuisine that appeals to Working Moms and their children

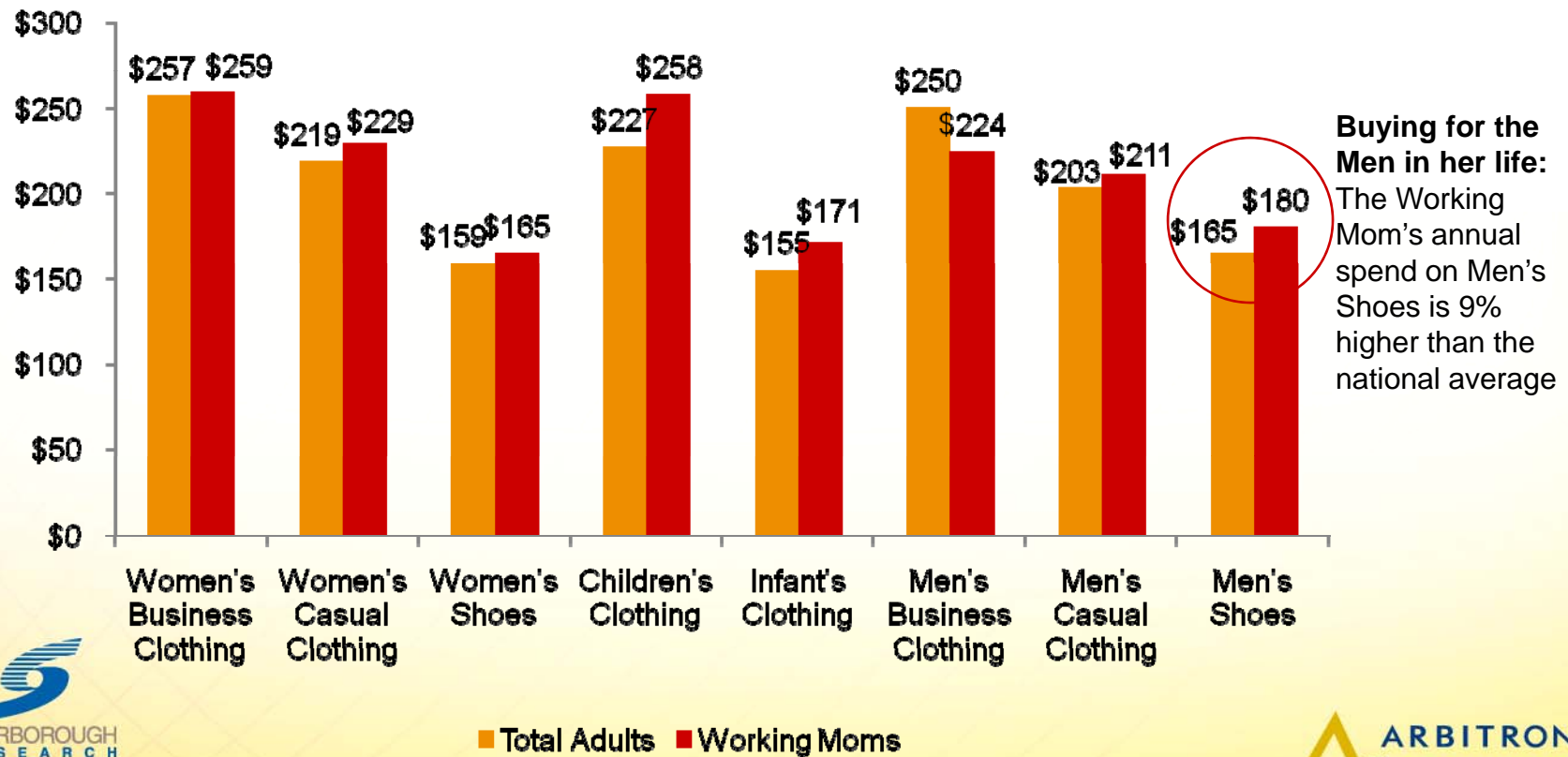




# Clothing the Family:

## Working Moms spend more annually across all clothing categories – she shops for the entire family

Average Amount Spent on Clothing Purchases, Past Year





# Clothing the Family

Many top-ranking stores for clothing purchases also sell a wide variety of other wares. Is there an untapped cross-shopping opportunity? *More to come.*

Store	% of Working Moms who Shopped there for Clothing past 3 months	Working Moms Index
Walmart	65%	128
Target	53%	162
JCPenney	41%	142
Kohl's	37%	145
Old Navy	34%	193
Macy's	26%	132

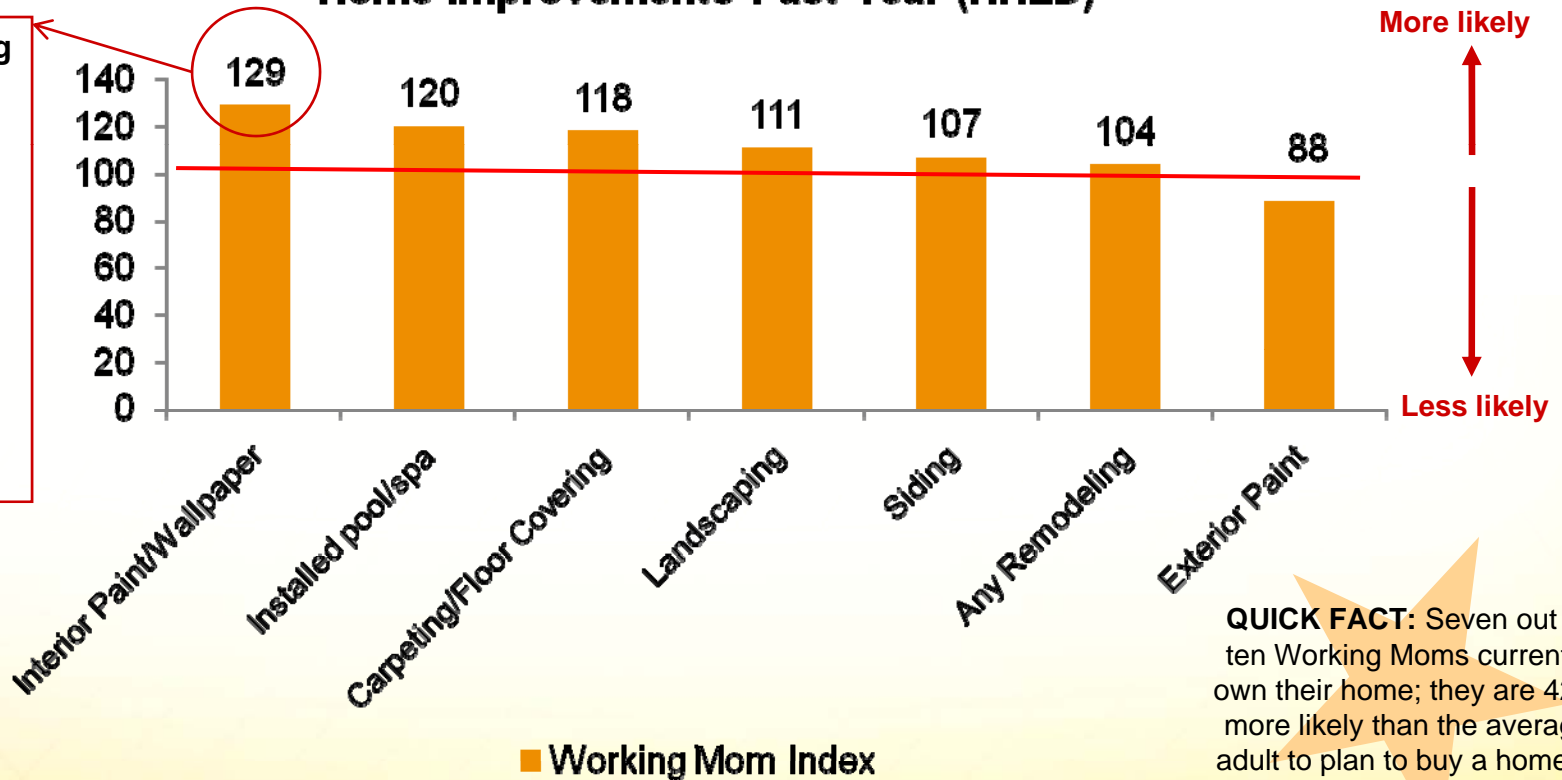
Walmart is the leading clothing retailer for Working Moms. 65% of Working Moms shopped there for clothing during the past three months, they are 28% more likely than total adults to have done so.



# Making a Home: Working Moms Want to Keep Their Homes Looking New and Fresh

**Home Improvements Past Year (HHLD)**

**Look for Working Moms in the paint aisle:**  
 Working Moms are 29% more likely to live in a household that has painted or wallpapered the interior of their home during the past year.



**QUICK FACT:** Seven out of ten Working Moms currently own their home; they are 42% more likely than the average adult to plan to buy a home in the next year.



SOURCE: Scarborough Research, Scarborough USA+ Study, Release 1 2009





# Making a Home: Home Improvement Store Shopping

**QUICK FACT:** Working Moms spent \$3,334 on home improvements during the past year

Store	% of Working Mom households who shopped for home improvement items, past year	Working Moms' Households Index
Home Depot	48%	102
Lowe's	42%	103
Walmart	35%	114
Ace Hardware	16%	76
Target	14%	141

Home Depot and Lowes are the most popular stores for home improvement items among working moms, but this consumer group is more likely than other adults to shop at Walmart or Target for these types of goods.



# Cross-Shopping: The Walmart Example

Department	% of Walmart's Working Mom Shoppers	Working Mom Index (vs. all Walmart shoppers)
Home Accessories	81%	110
Clothing	80%	116
Toys	66%	144
Office Supplies	59%	119
Non-Prescription Health/Beauty Items	58%	128
Prescriptions	17%	99
Shoes	40%	131
Electronics	42%	120
Hardware/Paint/Lawn/Garden	41%	106
Sporting Goods	28%	106

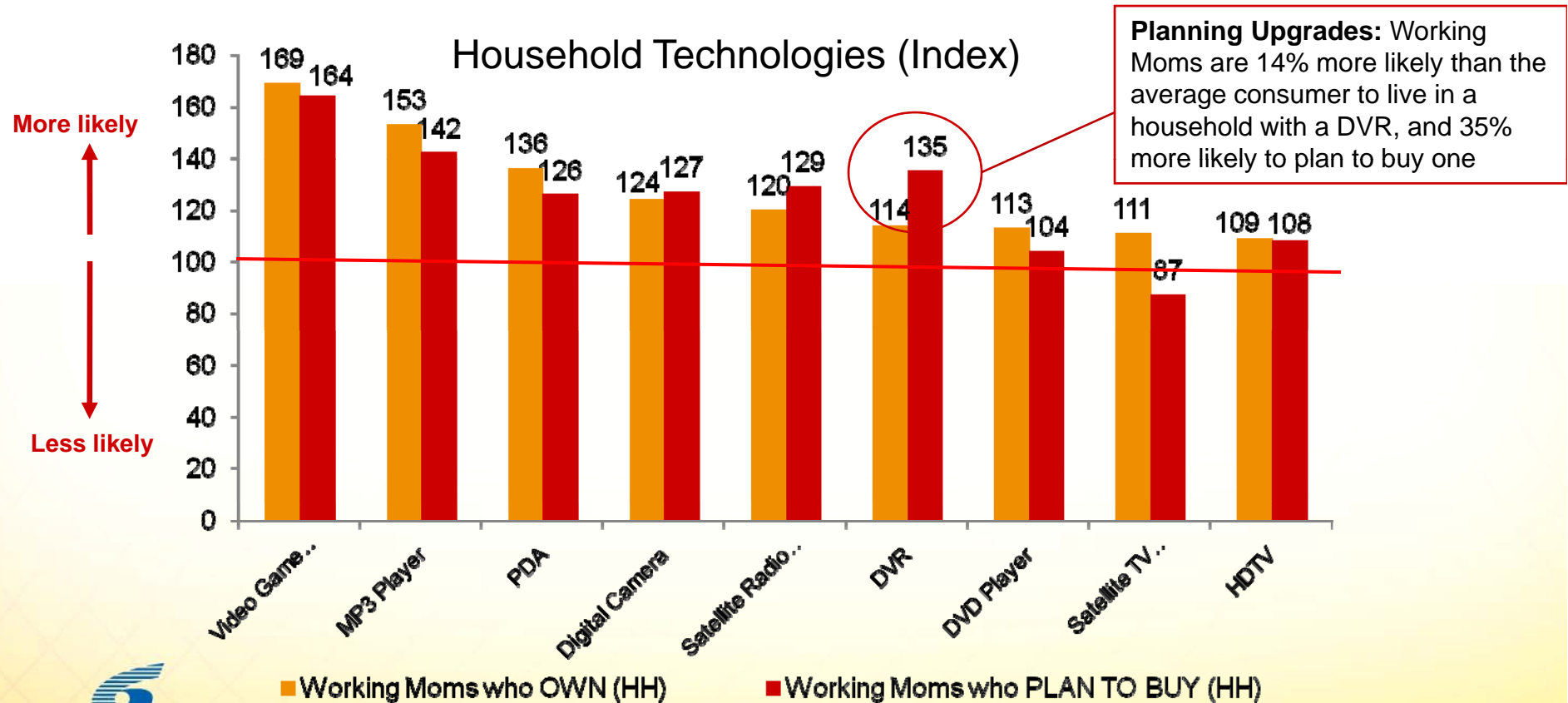
- Working Moms shop Walmart for a wide variety of goods
- But there is room to grow: pharmacy, home improvement, sporting goods

**How to Read:** 17% of Working Moms who shopped Walmart during the past three months made a prescription drug purchase there during the past year. When compared to Walmart shoppers, Working Moms are average for making this type of purchase at the store



# Cool Stuff: Keeping the HHLD Updated with Technology

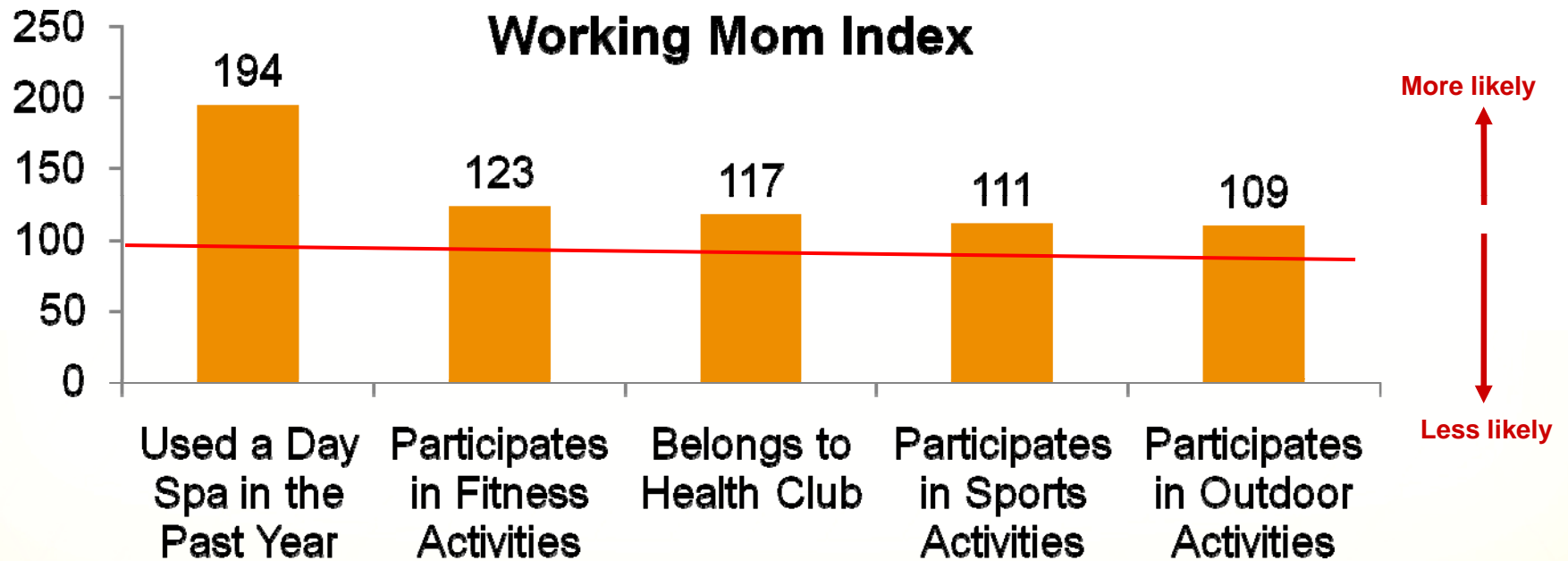
Working Moms are not only more likely than other consumers to have hi-tech items at home, they also want to upgrade it





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

When it's time to rest, they do not rest – prefer to exercise and be physically active during free time



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## Multichannel Marketing

*How to Reach the Working Mom*

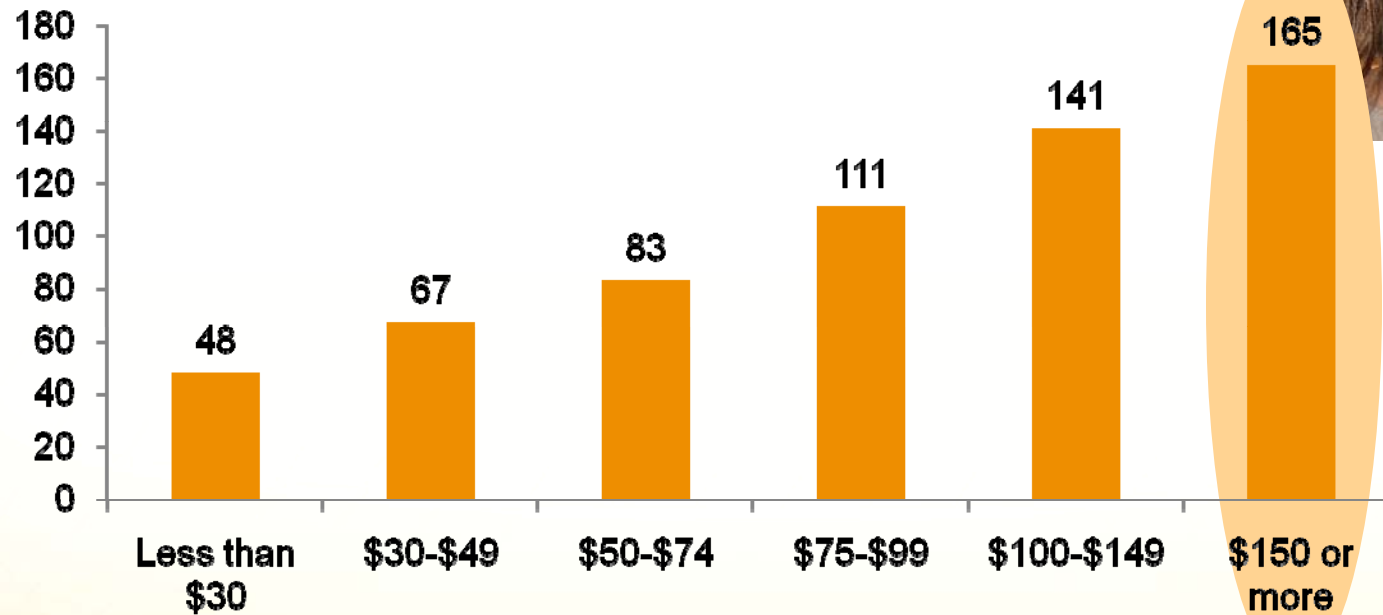




# Working Moms are Mobile Marketing Targets



## Cellular Phone Bill Past Month



### Working Moms Index vs. Total Cellular Subscribers

**QUICK FACT:** The average cellular bill for the Working Mom is \$93.56 – which is 21% higher than the national average.





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

### Hot Categories

(Top Indexers, More Likely)

Way Internet Used Past Month	Online Working Moms Index
Download coupons	133
Local/Community Events	125
Internet Yellow Pages	125
Movie Listings	124
Job/Employment Search	122
Pay Bills	121
Download/Listen to Music	107
Real Estate Listings	106

### Lukewarm Categories

(Average Indexers, On Par)

Way Internet Used Past Month	Online Working Moms Index
Listen to Radio	105
Email	101
Instant Messaging	101
Travel Reservations	99
News	96
Weather	96
Medical Info	96

### Cold Categories

(Bottom Indexers, Less Likely)

Way Internet Used Past Month	Online Working Moms Index
Fantasy Sports	43
Sports Scores/Updates	46
Personal Ads/Dating	70
Auto Info	73
Traffic	77
Casino-type Games	79
Auction Site	80
Financial Info/Services	87
Blogs (read or contribute)	92



## Online Purchases Also Reflect Utility, Convenience Focus

### Hot Categories (Top Indexers, More Likely)

Items Bought Online Past Year	Online Working Moms Index
Toys/Games	163
Movie Tickets	140
Health/Beauty Items	139
Clothing/ Accessories	135
Pet Supplies	123
Groceries/Candy/Food	119
Flowers	117
Office Supplies	116

### Lukewarm Categories (Average Indexers, On Par)

Items Bought Online Past Year	Online Working Moms Index
Sports Apparel	105
Insurance	105
Books	104
Other Travel	102
Cultural Event Tickets	102
CDs/Tapes/Music	102
Wine	100
Airline Tickets	99

### Cold Categories (Bottom Indexers, Less Likely)

Items Bought Online Past Year	Online Working Moms Index
Vehicle	68
Computer Hardware/ Software	72
Consumer Electronics	72
Medicine/Rx	88
Sporting Event Tickets	91



**A question to ponder:** Are Working Moms Under-Marketed to Online? Their annual spend is \$771, vs. \$854 for total Internet users.

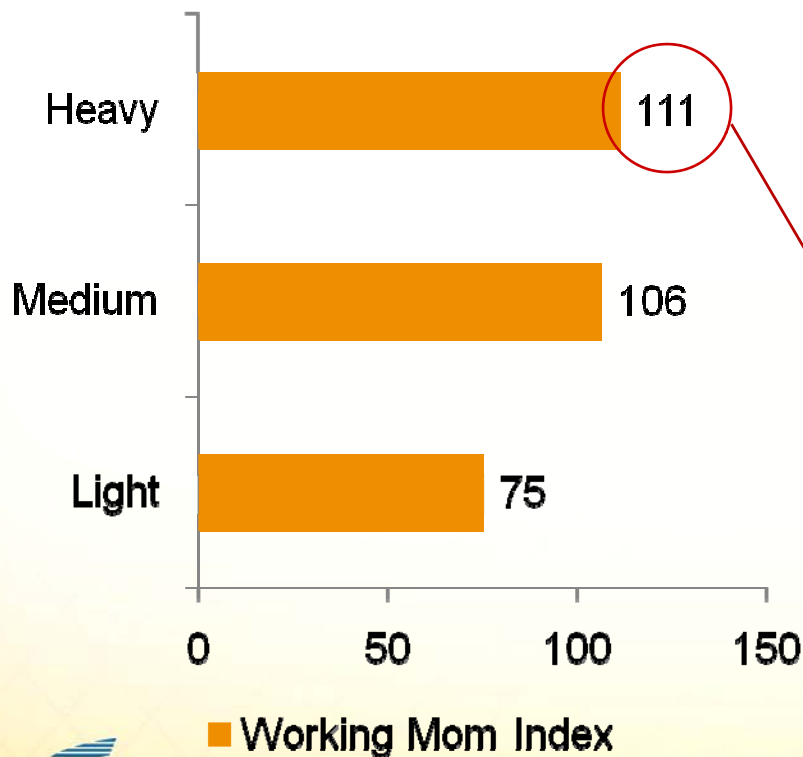
SOURCE: Scarborough Research, Scarborough USA+ Study, Release 1 2009  
 Indexes are compared to total adults who access the Internet





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

## Out-of-Home Media Quintile



## Working Mom's Are in the Car A Lot!

	% of Working Moms Who ...	Working Moms Index
Drove 1000+ Miles in the Past Month	21%	109

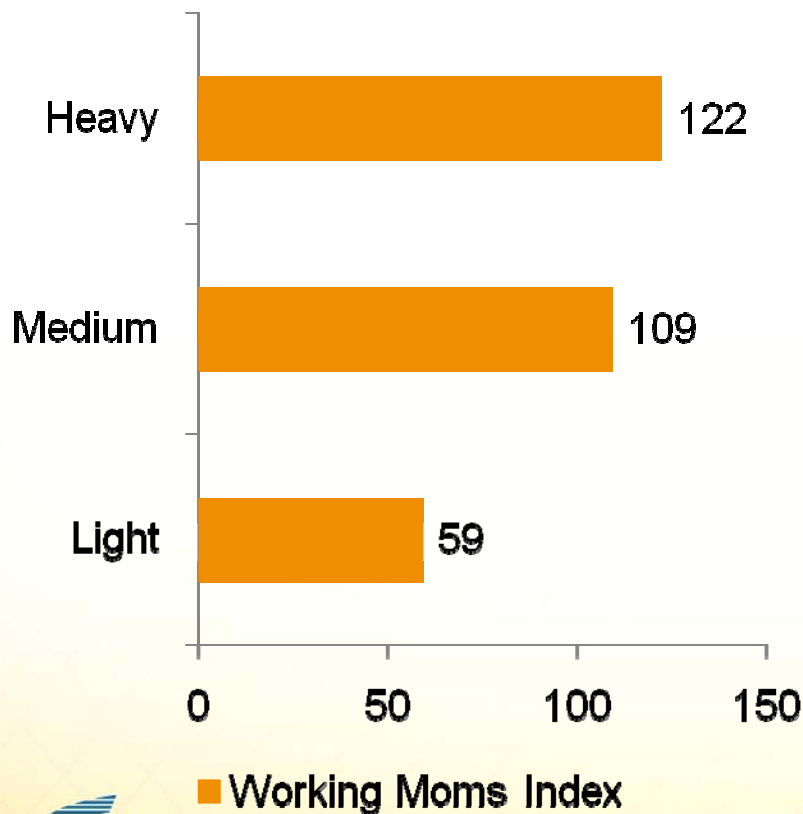
**How to Read:** Working Moms are 11% more likely to be among the country's heaviest users of Out-of-Home media, otherwise known as "Quintile 1" Out-of-Home Media Users.

Quintiles divide adults into five groups based on their media usage. Quintile 1, or "Heavy" represents the top 20%, most avid users of the medium. Quintile 5, or "Light," represents the lightest or least avid users of the medium.



# Radio Profile of the Working Mom

## Radio Quintiles



## Top Radio Formats for Working Moms

(% Composition)

1. Children's Radio: 25%
2. Family Hits: 18%
3. Pop CHR: 17%
4. Urban AC, Hot AC, Urban Oldies and Gospel (tie): 16%
5. Rhythmic CHR, Urban Contemporary, Contemporary Inspirational and Modern AC: 15%

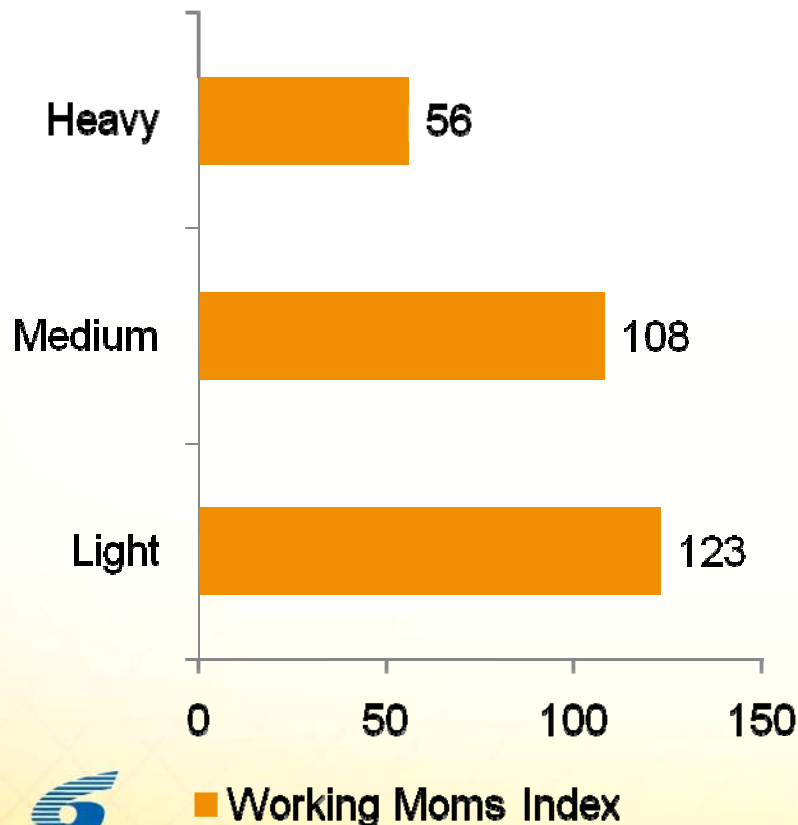
**Target Moms + Kids:** One-quarter of the adult Children's Radio listening audience consists of Working Moms, which implies that there are opportunities to target Moms along with kids during these broadcasts.



# Television Profile of the Working Mom

**Quick Fact:** 41% of Working Moms visited a Broadcast Television website during the past month

## Television Quintiles



## Top Television Genres for Working Moms

(% of Working Moms who Watch)

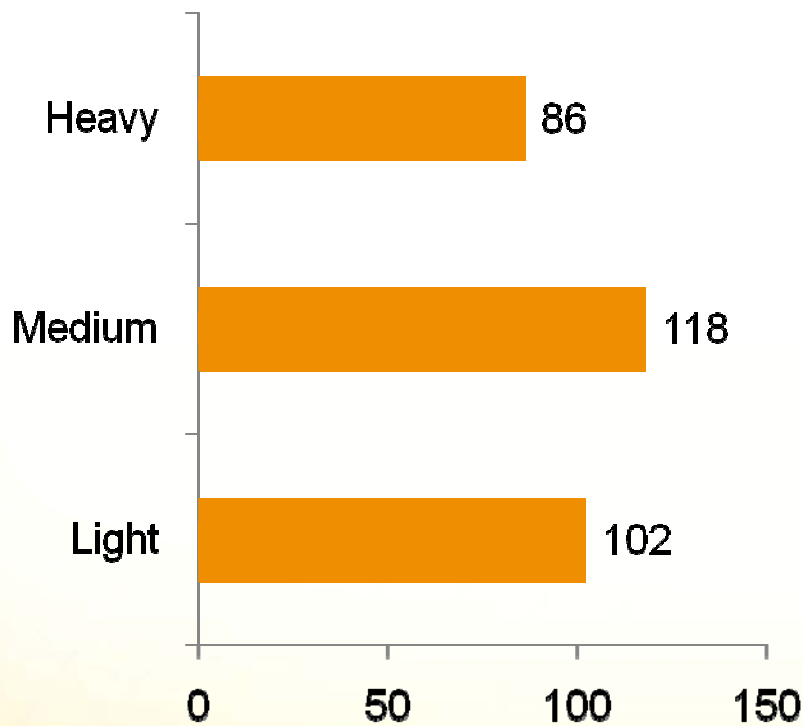
1. Movies: 57%
2. Comedies: 56%
3. Morning Local News/Evening Local News (Tie): 43%
4. Dramas: 40%
5. Kids Shows: 38%

**Target Moms + Kids (squared!):** Similar to radio, the Working Moms is watching TV with her children and catching kids shows. She also enjoys her local news programming.



# Newspaper Profile of the Working Mom

## Working Mom Index



■ Working Mom Index

## Newspaper Readership Details: Online and Print

	% of Working Moms Who ...	Working Moms Index
Visited Newspaper website past week	25%	127

**Appeal to her digital nature:** Working Moms 27% more likely than total adults to have read a newspaper online during the past week.



Quintiles divide adults into five groups based on their media usage. Quintile 1, or "Heavy" represents the top 20%, most avid users of the medium. Quintile 5, or "Light," represents the lightest or least avid users of the medium.

SOURCE: Scarborough Research, Scarborough USA+ Study, Release 1 2009



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## Turning Insights Into Action

*What does all of this mean to you?*





# The Working Mom has Spending Power, Relevance

- Highly Desirable Target Group
  - » Account for 22 million consumers with above average income
  - » Control over spending for the family as well as themselves
  - » Influence brand preference for children and spouse
  - » Are Working Mom's in this target group for a longer period of time?
- Greater need to understand the geographic nuances of the Working Mom across the country
  - » 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



# Source and Contacts

SOURCE: Scarborough Research, Scarborough USA+ Study, Release 1 2009

The data in this study is from Scarborough USA+ Release 1 2009. Data collection dates are February 5, 2008 through March 7, 2009, except for page 12, which is based on six months of data. For more information on this study, please see [www.scarborough.com](http://www.scarborough.com).

Take a deeper dive. Contact Scarborough to find out about how you can expand this study to find out even more information on the Working Mom:

## CONTACTS

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