



Marketing to Moms Coalition

Holiday Shopping

2009 Highlights

For Questions, Please Contact
Amy Colton
(312) 929-0503

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I. Introduction and Purpose

The *Holiday Shopping 2009* Report was prepared by the Marketing to Moms Coalition.

The Marketing to Moms Coalition is an independent organization dedicated to supporting and promoting an understanding of mothers as the most powerful consumer group in the U.S.

A resource for industry professionals, the coalition is dedicated to providing insights, identifying trends and connecting members. The coalition will deliver on its mission by:

- Sharing Best Practices
- Disseminating proprietary research
- Awarding the HER seal to companies and brands that honor, empower and respect mothers
- Offering networking opportunities for like-minded marketing professionals
- Hosting events and symposia

The purpose of the *Holiday Shopping 2009* Report is:

1. To fulfill the mission of the Marketing to Moms Coalition
2. To provide actionable data and insights on American Moms are approaching Holiday Shopping for retailers, manufacturers and other professionals who market to Moms
3. To establish a benchmark for ongoing tracking (and as point of comparison for other studies)

Founding members of the Marketing to Moms Coalition (www.marketingtomomscoalition.org) include:

- Maria Bailey, CEO BSM Media
- Bridget Brennan, CEO Female Factor
- Michal Clements, Managing Partner, Insight to Action
- Amy Colton, Senior Vice President, Current Lifestyle Marketing
- Teri Lucie Thompson, VP, Marketing and Media, Purdue University



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II. Methodology

A nationally representative sample of American Moms was contacted in June-July 2009 via an online invitation. This sample was balanced on region, household size, population density, income and ethnicity.

An ending sample of 1,225 Moms with children under 18 living at home completed the online questionnaire. All Moms were recruited online through mail panel provider, Market Tools. This sample included:

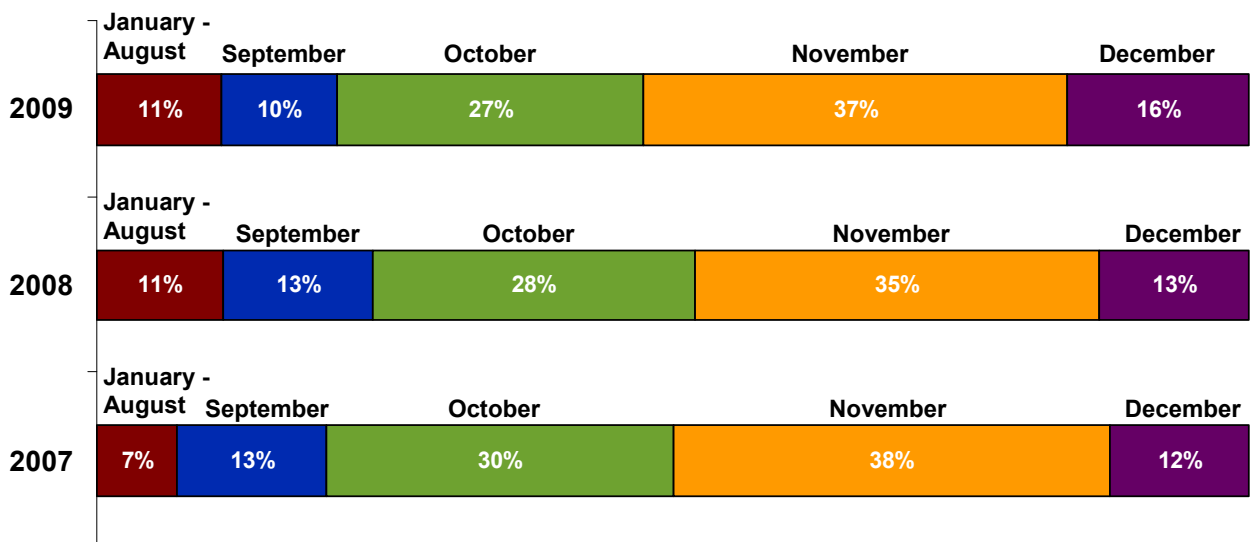
- 1,013 English Speaking Moms
- 212 Spanish Speaking Hispanic Moms

In addition to the total sample, we also looked at variations among Moms with children of different age groups. In order to qualify, Moms needed to have at least one child within the given age group in the household.

Results were analyzed by Insight to Action, Inc.

III. When Mom's Shopping Starts for the Holidays

The most popular time for Moms to start shopping for the holidays is October (27%) and November (37%). This is consistent with the shopping tendencies of Moms in 2007 and 2008.



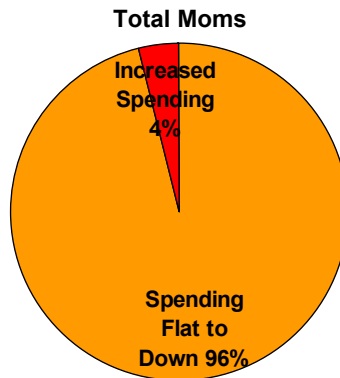


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IV. Mom's Holiday Shopping Spending - Total

Overall, we project holiday shopping for 2009 to be flat vs. 2008. This is because anticipated spending is flat to down for the majority of Moms (96%). A small number of "big spender" moms (4%) will spend \$2000+ this holiday season and are expecting to increase their spending by 9%.

Total Mean Spending Compared to 2008



V. Holiday Gifts

Moms plan to buy different holiday gifts for their children depending on age of children. The gift moms find most appropriate for children 6 years old or younger is toys, followed by clothing and books. For school age children (7 to 12) top gifts are video equipment/games, toys, books and clothing. The most popular gifts for teens are music electronics/music, clothing and gift certificates.

Items Most Likely to Purchase as a Holiday Gift for Each Age Range

Total Moms

Child 6 Years Old or Under		Child 7 to 12 Years Old		Child 13 to 17 Years Old	
1. Toys	51%	1. Video equipment and/or games	30%	1. Music electronics/music	28%
2. Clothing	29%	2. Toys	29%	2. Clothing	27%
3. Books	26%	3. Books	28%	3. Gift certificate	23%
4. Movies	23%	4. Clothing	28%	4. Beauty/fragrance items	21%
5. Video equipment and/or games	8%	5. Movies	25%	5. Video equipment and/or games	21%
6. Sporting/exercise equipment/ clothing	7%	6. Music electronics/music	20%	6. Movies	19%
7. Classes of any type	6%	7. Sporting/exercise equipment/ clothing	18%	7. Sporting/exercise equipment/ clothing	18%
8. Pet(s)	6%	8. Gift certificate	14%	8. Books	17%
9. Computer/computer equipment	5%	9. Jewelry/watches	12%	9. Computer/computer equipment	16%
10. Jewelry/watches	5%	10. Camera	11%	10. Camera	15%
		Computer/computer equipment	11%		



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V. Holiday Gifts (cont'd)

Clothing is holding strong for teens, while younger kids may be wearing more 'hand me downs'. Video games held flat across all (perhaps reflecting kid's request), "big ticket" computers/computer equipment was down across the board. Additionally, teen moms spend the most, while younger kid moms spend the less.

**Top 6 Items Most Likely to Purchase as a Holiday Gift for Each Age Range
2008 to 2009 Comparison (Total Moms)¹**

Child 6 Years Old or Under		Child 7 to 12 Years Old		Child 13 to 17 Years Old	
	<u>2008-2009 % Change</u>		<u>2008-2009 % Change</u>		<u>2008-2009 % Change</u>
Clothing	-6%	Books	-4%	Clothing	4%
Books	-5%	Video equipment and/or games	-1%	Cell phone/PDA	-7%
Movies	-4%	Clothing	-1%	Computer/computer equipment	-5%
Computer/computer equipment	-6%	Movies	-3%	Video equipment and/or games	1%
Video equipment and/or games	-2%	Computer/computer equipment	-15%	Gift certificate	4%
Sporting/exercise equipment/ clothing	-2%	Sporting/exercise equipment/ clothing	-2%	Movies	1%

Cuts on all four top items

Computers, books and movies down

Clothing and gift cards up, electronics down

Average Dollars Anticipated Spending Index ²	Moms with Child(ren) ≤6	Moms with Child(ren) 7-12	Moms with Child(ren) 13-17
	96	108	113

Note¹: Toys could not be compared year to year, due to different breakout of toys in 2008.

Note²: Index calculated by dividing the average dollars spent for each group by the average dollars spent for the Total Moms sample.

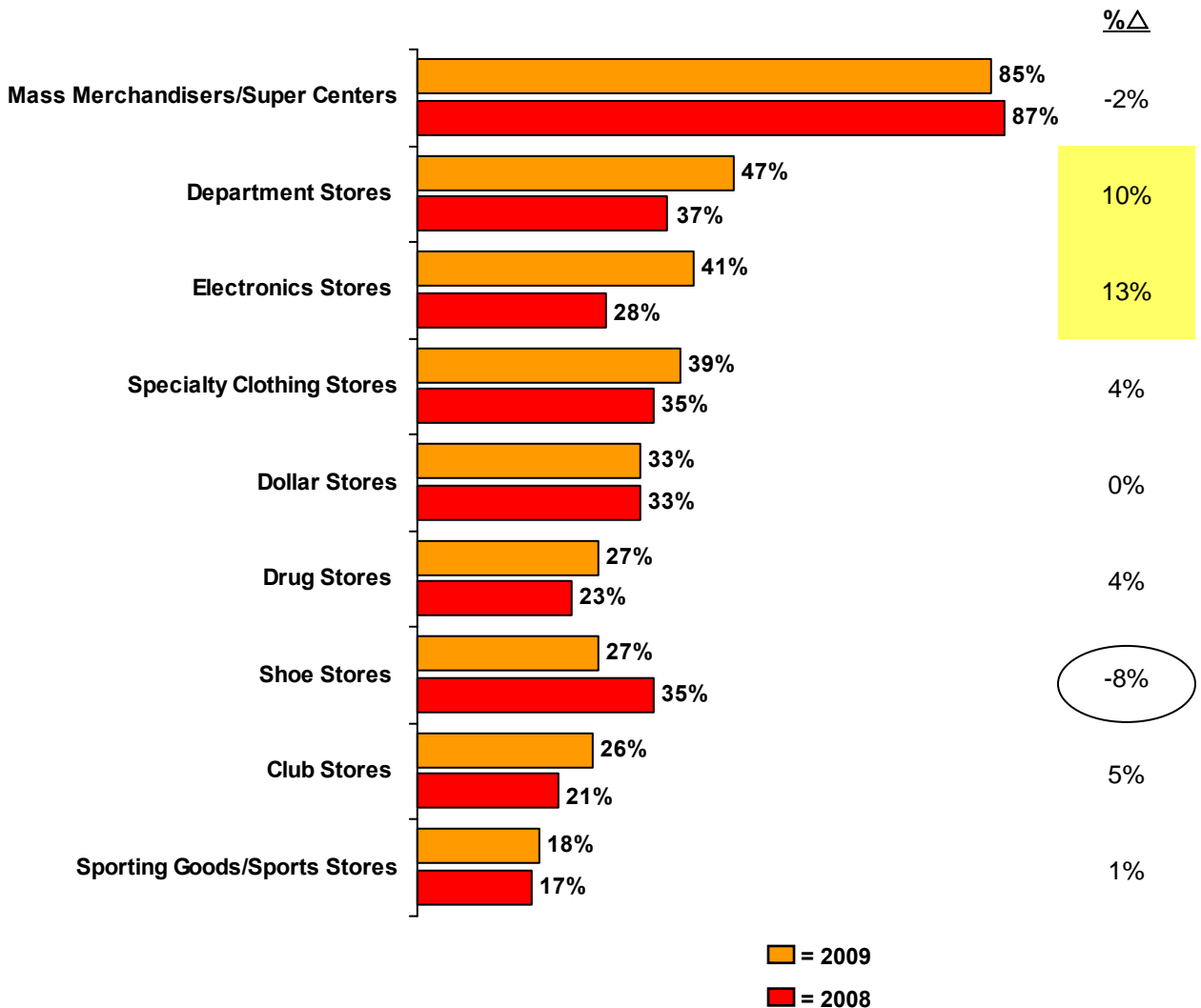


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VI. Retailers Moms Plan to Shop for the Holidays

The majority of Moms plan to shop at mass merchandisers/super centers for the holidays. Anticipated holiday shopping this year has increased significantly for department and electronics stores, while Moms are less likely to shop at shoe stores compared to last year.

Retailers Moms Plan to Shop for the Holidays
Total Moms





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VI. Retailers Moms Plan to Shop for the Holidays – cont'd.

Regardless of household income or ethnicity, most Moms plan to shop at mass merchandisers. Moms with higher household income (\$75K+) plan to shop at more places, including department, specialty clothing, club and sporting goods stores, while those with lower income skew to dollar stores. Compared to other ethnic groups, English Speaking Hispanic Moms are more likely to shop at electronics stores and African American Moms at dollar and shoe stores.

Retailers Moms Plan to Shop for the Holidays

By Income

	Total Moms	Under \$35,000	\$35,000-\$74,999	\$75,000 or More
Mass Merchandisers/Super Centers	85%	85%	87%	83%
Department Stores	47%	39%	46%	61%
Electronics Stores	41%	37%	41%	46%
Specialty Clothing Stores	39%	29%	40%	51%
Dollar Stores	33%	44%	31%	22%
Drug Stores	27%	30%	27%	24%
Shoe Stores	27%	32%	26%	21%
Club Stores	26%	21%	25%	36%
Sporting Goods/Sports Stores	18%	10%	17%	29%

By Ethnicity

	Total Moms	Caucasian	African American	English Speaking Hispanic	Spanish Speaking Hispanic
Mass Merchandisers/Super Centers	85%	89%	84%	90%	69%
Department Stores	47%	48%	47%	52%	39%
Electronics Stores	41%	42%	39%	49%	31%
Specialty Clothing Stores	39%	42%	33%	40%	33%
Dollar Stores	33%	32%	45%	25%	32%
Drug Stores	27%	28%	29%	24%	25%
Shoe Stores	27%	19%	47%	28%	34%
Club Stores	26%	26%	22%	29%	27%
Sporting Goods/Sports Stores	18%	21%	10%	19%	12%

■ = 8 points above Total

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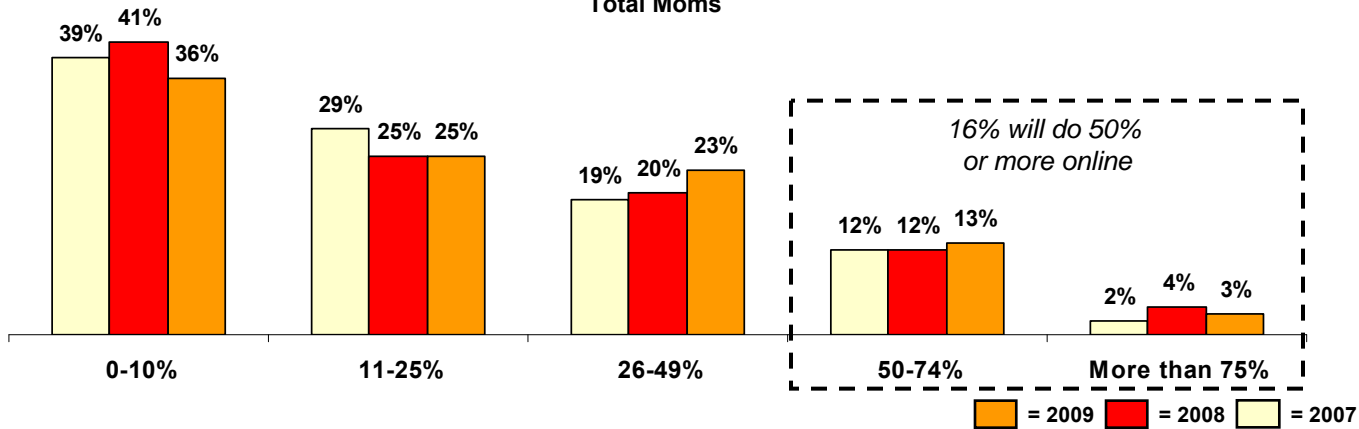
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VII. Online Holiday Shopping - Percent of Mom's Holiday Shopping That Will be Done Online

16% of Moms plan to do 50% or more of their holiday shopping online, which is consistent with last year's levels. Moms with higher education and higher household income are consistently planning to do more of their shopping online than other Moms.

"How Much of Your December Holiday Shopping Will Be Done Online"

Total Moms



Items Planned to Purchase Online

Toys, clothing/clothing accessories and music/movies are the top three items Moms plan to buy online for the 2009 holidays.

Items Moms Plan to Buy Online

Total Moms

