

MARCH 2018



# MIND THE GAP:

## THE GENDER EFFECT ON SHOPPING HABITS AND TECHNOLOGY DISRUPTORS



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

# ABOUT FIRST INSIGHT



**We help businesses create more profitable products and experiences with predictive digital testing software.**

First Insight's Experience Management (XM) software helps retailers and brands increase profitability by using predictive analytics to deliver the best possible product, brand, customer, and employee experiences.

Our digital testing platform combines voice of customer data, AI, and a proprietary algorithm to help you understand product and concept performance before investing.

## What We Do



**Digital product testing**



**Increase speed to market**



**Price optimization**



**Inform inventory buy-depth decisions**



**Account management support**



**Quantity and prove value delivery**



## Understand Your Customer

Learn how to maximize outcomes and drive growth with First Insight. Schedule a personalized meeting with us today.

**REQUEST DEMO**

First Insight conducted a consumer survey examining retail industry disruptors that could be driving shopping behaviors and purchase decisions. Results revealed a significant gender gap between how men and women shop and make purchase decisions, as men are less likely to embrace disruptors such as mobile shopping, Amazon.com, discount retail and AI.

The survey found that:

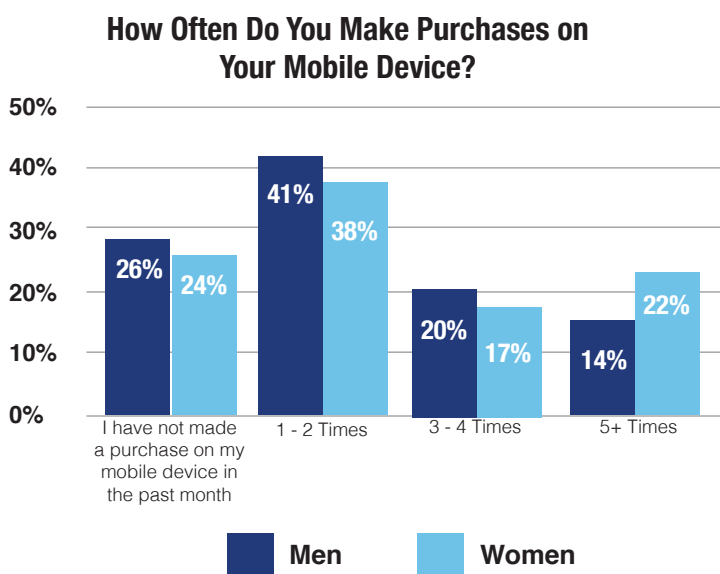
1. Women are more frequently shopping on mobile devices than men, and men are making fewer purchases than women when they do shop online.
2. Men are less likely to price compare online before they buy. Additionally, fewer men are using Amazon.com compared to women to shop or compare prices before buying. Further, fewer men subscribe to Amazon Prime.
3. Men are more likely to shop in-store at full price retailers than women, indicating that the ability to touch and feel a product is a main driver that takes them in-store.
4. While more men shop in-store at full-priced retailers versus discount retailers like TJ Maxx, women are more likely to shop discount retailers versus full-price retailers. However, online discount retailers seem to be gaining favor with men in the last year. Women visit traditional and online discount retailers almost equally.
5. Among respondents who own smart speakers such as Amazon Echo or Google Home, more men than women have used it to research prices. However, women are twice as likely to purchase a smart speaker in the next year than men.

The survey, which queried 1,000 participants, was fielded in December 2017 and was completed through proprietary sample sources amongst panels who participate in online surveys.

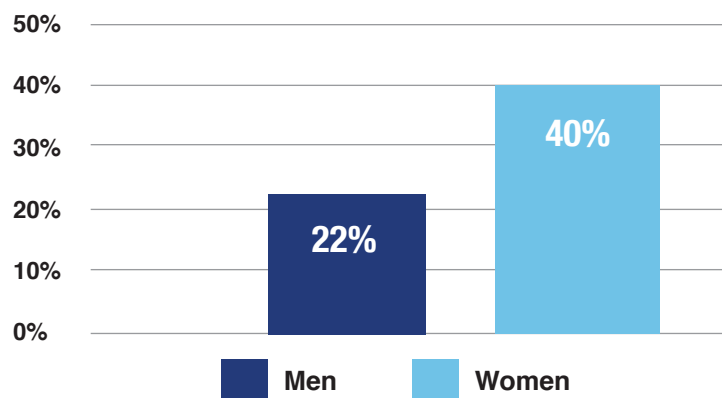
First Insight is a cloud-based technology company that tests consumers' reactions to new products before they go to market across many categories and geographies. The company uses proprietary predictive analytics to determine which trends, price points and design attributes resonate with consumers.

## MEN ARE LESS LIKELY TO SHOP ON MOBILE DEVICES THAN WOMEN

According to the First Insight study, fewer men are frequently shopping on mobile devices compared to women. Only 22 percent of male respondents reported frequently shopping on mobile devices compared to 40 percent of women, representing a significant gap in how the two approach purchasing items.



**Frequently Purchase on Mobile Devices**

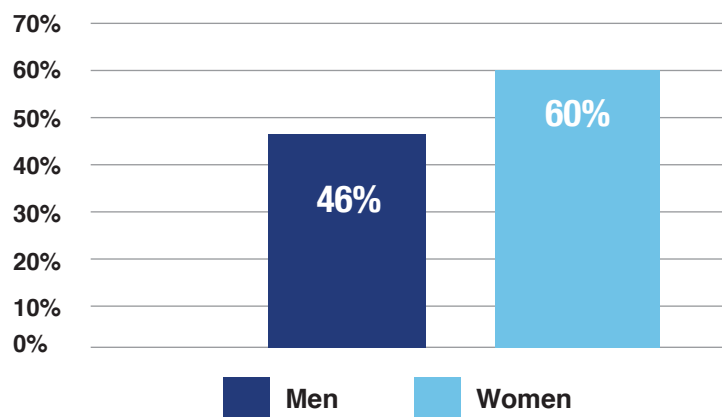


Further, men are making fewer purchases than women when they do shop online. Sixty-seven percent of male respondents made two or less purchases on a mobile device in the month prior to the survey, versus 62 percent of women. Additionally, 22 percent of women made five or more purchases versus only 14 percent of men.

## MEN ARE SHOPPING ON AMAZON LESS THAN WOMEN

The gender gap is growing when it comes to Amazon shoppers, with the vast majority being women, according to the study. Only 46 percent of men are frequently shopping on Amazon, versus 60 percent of women, and the gap seems to be increasing. The majority of women (55%) say their shopping on Amazon has increased in the past year, versus 48 percent of men, with fewer men (43%) subscribing to Amazon Prime than women (54%).

**Frequently Purchase on Amazon.com**

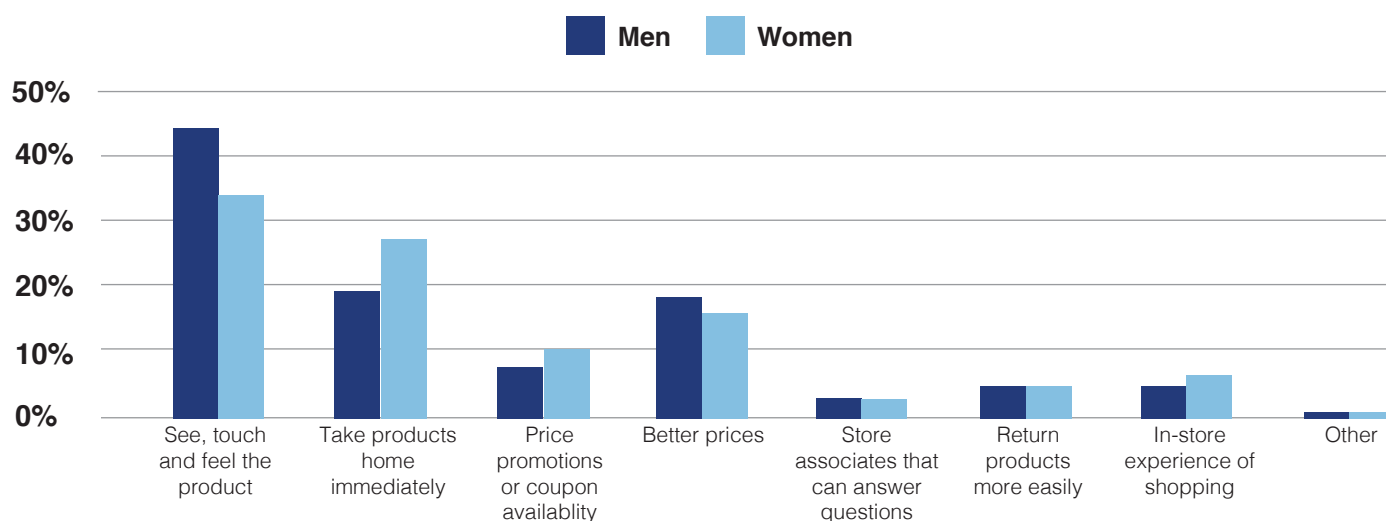




## MEN CITE SEEING AND TOUCHING A PRODUCT AS THE MAIN DRIVER FOR SHOPPING IN-STORE

Forty-four percent of male respondents cite being able to touch and feel a product as a main driver that takes them in-store, a sentiment shared by only 33 percent of women respondents. More female respondents (27%) felt that being able to take a product home was a key driver, versus only 19 percent of men. The data also showed that price promotions were one of the least important factors for bringing men in store; however, better in-store pricing was more important to men than women.

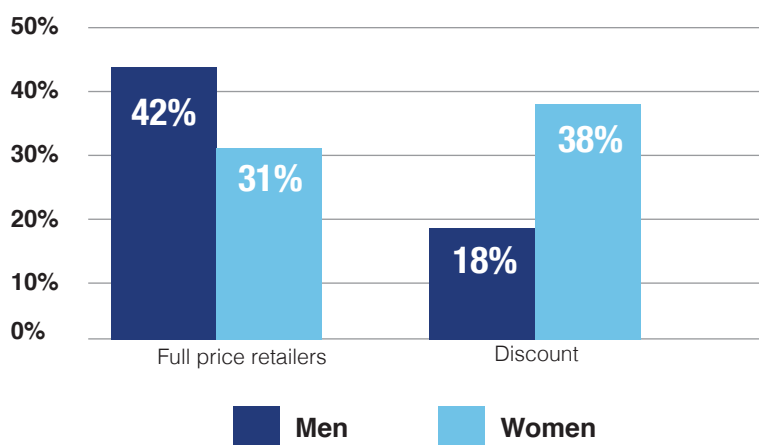
**Most Important Factor That Would Make One Want to Shop in Physical Store Versus Buying Online**



## MORE MEN SHOP AT FULL PRICE RETAILERS OVER DISCOUNT RETAIL, BUT INTEREST IN ONLINE DISCOUNT RETAIL IS GROWING

The survey unearthed a significant difference between how men and women shop at discount retailers. Men are much more likely to shop at full-priced retailers (42%) over discount retailers (18%), while women are more likely to shop discount retail (38%) over full-price (31%).

**Frequently Shop at Discount Retailers vs Full Price Retailers**

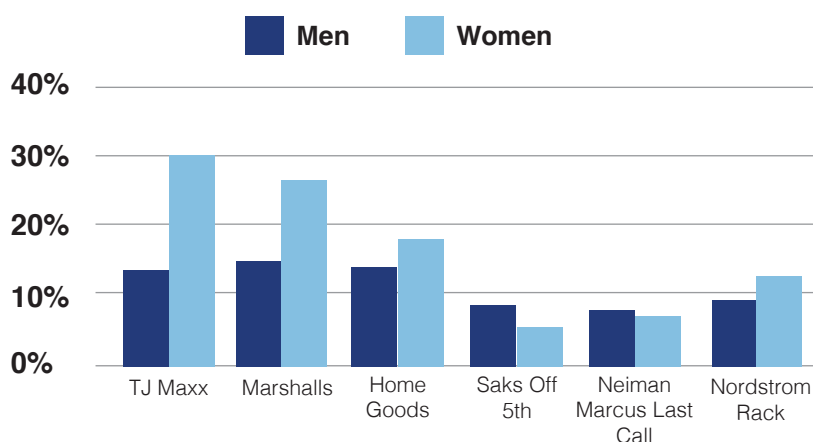


MARCH 2018

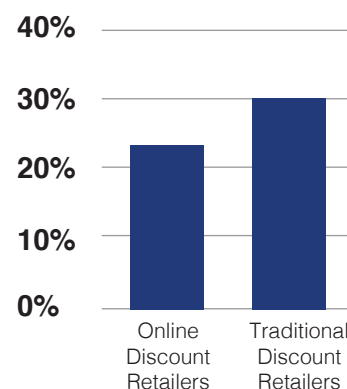
Increasing traffic to discount retailers is also being driven by women, with 30 percent of female respondents saying that their shopping at discount retailers has increased over the past year, versus only 22 percent of men.

According to the survey, while top discount retailers including TJ Maxx, Marshalls and Home Goods are seeing a significantly higher number of women coming in-store, online discount retailers seem to be gaining traction with men. Thirty percent of male respondents say their shopping at online discount retailers has increased in the last year, compared to only 22 percent at traditional discount retailers.

**Frequently Shop at Discount Retailer**



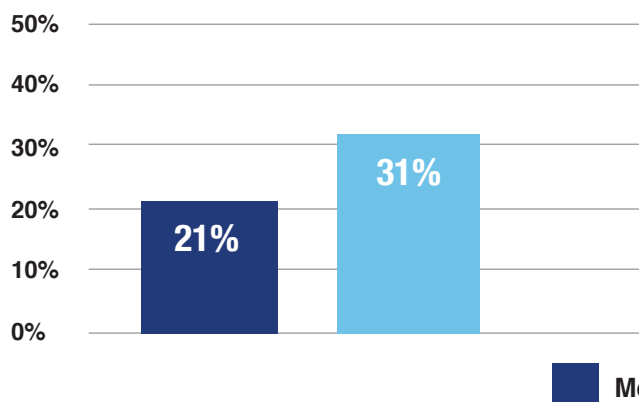
**Males Frequently Shopping At Online Discount Retailers Versus Traditional Discount Retailers In Last Year**



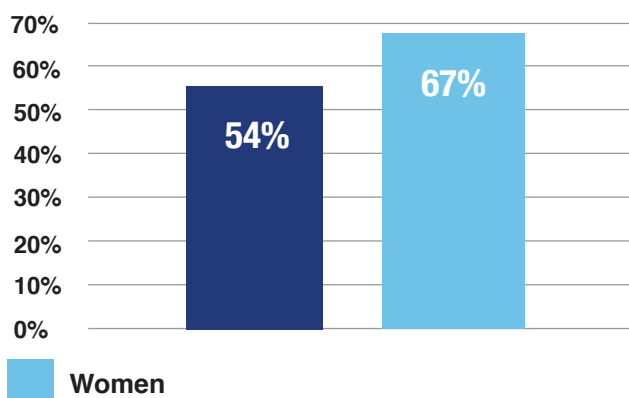
## FEWER MEN ARE PRICE COMPARING BEFORE THEY BUY

Only 21 percent of men are pulling out their phones to compare prices while physically in store compared to 31 percent of women. Further, significantly fewer men (54%) say they check Amazon.com for products and prices before shopping elsewhere versus 67 percent of women.

**Frequently Use Mobile Devices To Price Compare While Physically In Store**



**Check Amazon Before They Buy**

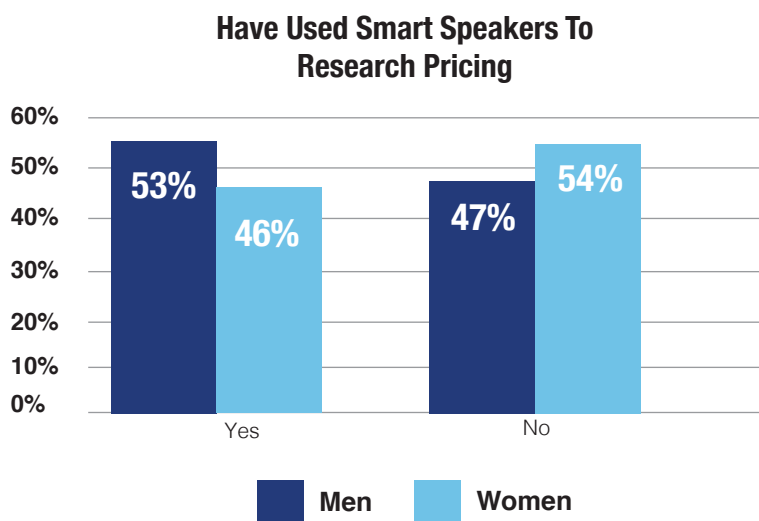


While overall, more respondents price compare using their mobile devices when visiting traditional retailers, a higher 20 percent of women are also doing it when at discount retailers, versus 15 percent of men.

MARCH 2018

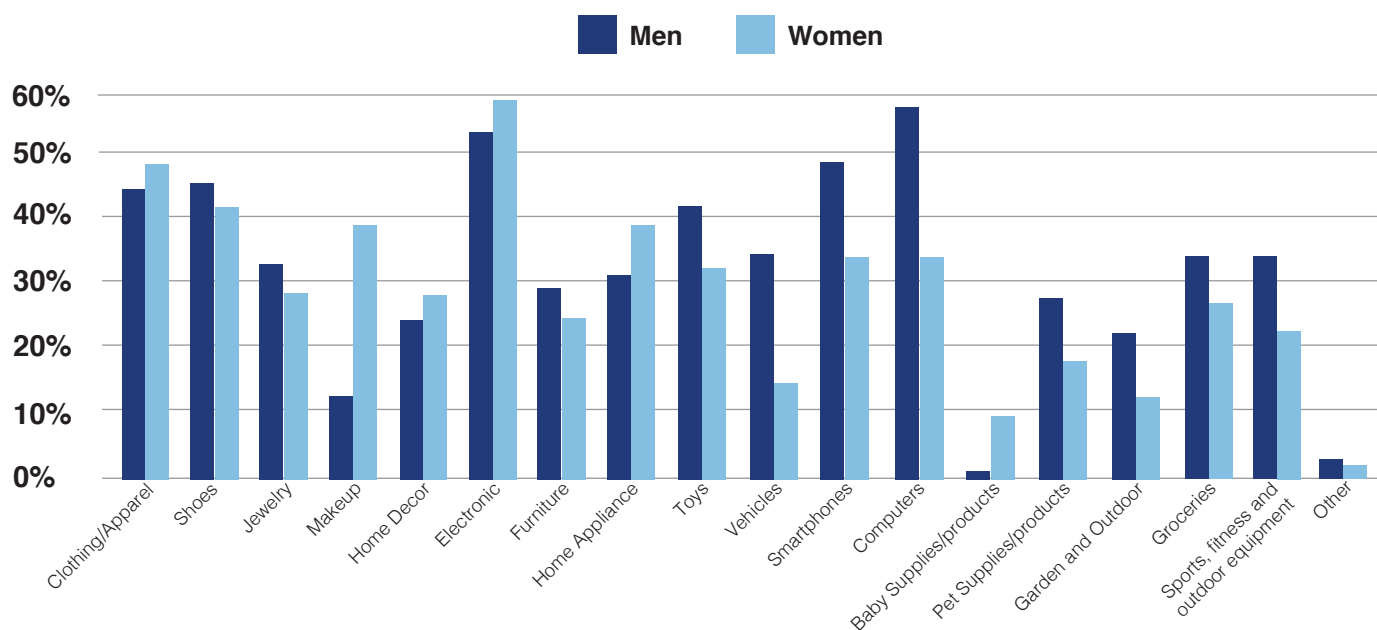
## MORE MEN USE SMART SPEAKERS TO RESEARCH PRICING, BUT ADOPTION IS DRIVEN BY WOMEN

Based on the survey, while men are using smart speakers like Amazon Echo or Google Home to price compare more often than women, women are the ones driving adoption. Twelve percent said they were likely to purchase one in the next year versus only six percent of men. Among respondents who own smart speakers, 53 percent of men say they have used them to research prices, versus 46 percent of women.



Of respondents who own smart speakers, men are using the devices to research computers and smartphones more than women, however the data shows that a high percentage of both men (53%) and women (59%) are researching electronics at a large rate. Men also research groceries and sports equipment more than women.

### When Using Smart Speaker To Research Product Prices, What Type Of Product?



## CONCLUSION

A consumer study by First Insight examining the impact of retail industry disruptors on shopping behaviors reveals a significant gender gap between how men and women shop and make purchase decisions. Men are not embracing mobile shopping, Amazon.com or traditional discount retailers as much as women. Additionally, men favor in-store shopping at full price retailers, driven by a greater need to see and touch a product before they buy. While a slightly higher percentage of men are price comparing on smart speakers, far fewer men than women are price comparing in-store or on Amazon.com before they make purchase decisions. Retailers should consider their in-store selection and the significantly different shopping behaviors between men and women, and align price points and merchandise with expectations for both genders in order to compete, both in-store and online.

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