Women’s Shopper STUDY

Index

Methodology

Shopping Intent Study
675 Women, 18-75 years-old, age and income representative of U.S. population, 97% confidence, online poll via Survey Monkey completed September 18, 2019

Brand Efficacy Preference Study
547 Women, 18-75 years-old, age and income representative of U.S. population, 97% confidence, online poll via Survey Monkey completed December 15, 2018

Overview

This holiday looks like a tough one for traditional retail and brands that sell directly.

This year (2019) income is improving a little, but intent to purchase during the holiday season looks flat overall.

Female shoppers voting with their spend choices continue to push for greater convenience and price value online with nearly half of respondents intending to make over 50% of their holiday purchases online.

Additionally more than half report that over 50% of their online spend is through Amazon. One area of growth online outside of Amazon is through resale sites, selling previously owned products, particularly for designer wear and accessories.

Overview *continued*

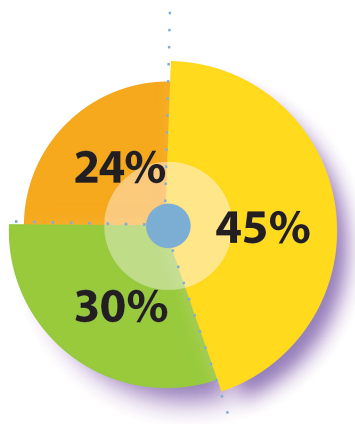
Intent to purchase during Black Friday and Cyber Monday will continue to be important. Value driven consumers are also looking for rebates and loyalty programs that can provide more total value. Prepaid cards that can be spent anywhere are preferred 2X more than PayPal and checks as the reward of choice for loyalty and rebates.

No new “must-have items” are appearing yet on shopping lists in the survey, with 80% having no idea what they intend to buy or want to receive themselves just eight weeks before the holiday shopping season officially begins.

Holiday Sales

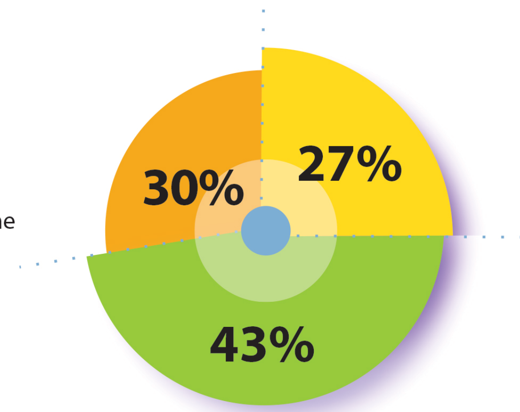
Wealth and Buying Power is stable vs. last year with the following reported vs. Last Year

- **45%** Improved
- **30%** The Same
- **24%** Less



Anticipated holiday shopping expenditures looks flat.
How much do you intend to spend this holiday season vs. last year?

- **27%** More
- **43%** The Same
- **30%** Less



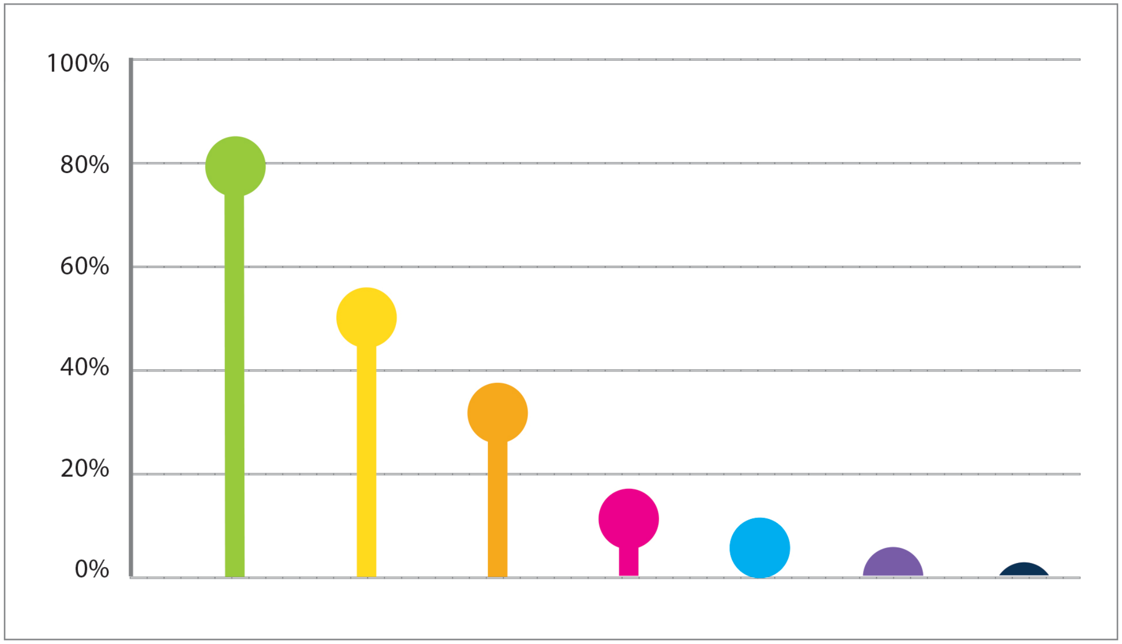
Massive Online / Mobile Holiday Sales

- **47%** Said that 50%+ of their Holiday Shopping is done Online
- **45%** Make 50%+ of all Online Purchases on their Phones

Online Shopping

Why They Shop Online

- **81%** Convenience
- **54%** Price
- **34%** Selection
- **17%** Speed
- **9%** Reviews
- **4%** Impulse Buys
- **0%** Referrals



Amazon

Continues To Grow

- **69%** Are Amazon Prime Members
- **52%** Make 50%+ Online Purchases through Amazon
- **76%** Make 25%+ of their Online Purchases on Amazon
- **54%** Shop for Bargains on Amazon Prime Day

Black Friday And Cyber Monday

Still A Big Deal

Although respondents are looking to take advantage of these deals, 80% don’t know what they are looking to give or receive just 8 weeks before the official Holiday Season begins.

21% Will do 50%+ of their Holiday Shopping during Black Friday / Cyber Monday

46% Will do 25%+ of their Holiday Shopping during Black Friday / Cyber Monday

Reseller Sites Seeing Wide Acceptance

Especially For Designer Brands

52% buy from Reseller Sites

Top items they purchase from Reseller Sites

1. Designer Clothes and Accessories
2. Collectibles
3. Non-Designer Clothes
4. Kids Items
5. Shoes
6. Furniture
7. Appliances
8. Sports / Exercise Equipment
9. Books / Electronics

Rebates and Loyalty Rewards

Rebates Attract, Loyalty Keeps Them Engaged

Significant opportunity in rebates in all categories – to drive best in market price.
70% would choose a $100 rebate over a $50 instant discount on a $500 purchase.
44% would choose a $10 rebate over a $5 instant discount on a $50 purchase.

Prepaid is the highest preferred loyalty reward when customer has all the product they want.

- **41%** Points to Redeem for Free Product
- **27%** Discounts on next Purchase
- **26%** Prepaid Rewards that can be redeemed anywhere
- **6%** Special Offers with limited time to Redeem

Surprise and Delight

84% of woment shoppers are more loyal to brands that surprise them with savings offers.

They Prefer Prepaid 2x over Check and Paypal for Reward/Payment or Refund.

88% would use special offers that accompanied a prepaid award if they were items they found to be of good value.

Name Vs Private Label Brand

Where Name Brands Are Most Preferred.

70% of women shoppers use Name Brands and Private Label Brands equally. They buy name brands because of assurance the product is to their standards. They buy Private Label Brands because they provide greater total value.

77%	76%	75%	72%	59%	51%
Smartphones	Autos	Large Appliances	Computers and Electronics	Insurance	Tires

Name Vs Private Label Brand

Where Most Neutral To Name Brands Or Private Label

37% of women shoppers believe name brands are 25% more expensive.
74% believe name brands are 15%+ more expensive.

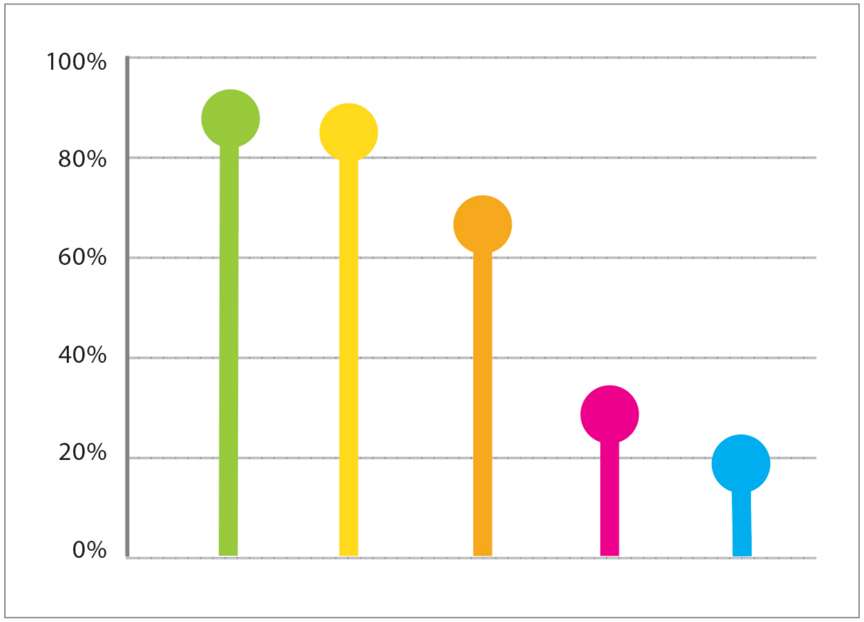
70%	67%	66%	65%	64%	63%	61%
Sports and Recreation Equipment	Housewares	Beds and Furniture	Clothing	Spirits	Home Improvement	Food

59%	57%	54%	54%	51%	50%	50%
Travel Services	Small Appliances	Health Related Products	Shoes	Lenders	Auto Parts	Beauty Personnel Care

Purchase Decisions

Five Most Important Factors When Making A Purchase

- **92%** Price
- **90%** Quality
- **71%** Availability / Selection
- **32%** Brand
- **21%** Store



How They Most Often Discover New Brands

All Women

76%	Friends and Family
44%	Retail Stores
43%	Amazon
40%	Google
40%	Social Media
40%	TV
23%	Retail Websites
20%	Printed Publications
19%	Referral Apps
16%	Online News Sources
15%	Shopping Apps
13%	Radio
8%	Other
4%	Outdoor Media
3%	Text Alerts

How They Most Often Discover New Brands

Gen Z And Millennial Women 18-30 Years Old.

81%	Friends and Family
64%	Social Media
61%	Google
52%	Amazon
50%	Retail Stores
31%	TV
29%	Retail Websites
25%	Referral Apps
20%	Online News Sources
13%	Radio
9%	Printed Publications
7%	Text Alerts
6%	Outdoor Media
6%	Other

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