INTRODUCTION

INTREPID MILLENNIAL EXPLORERS: CHANGING THE FACE OF MODERN CONSUMERISM

Millennials - the group of young, up-and-coming Americans in their post college 20s to early 30s - now represent the next rising generation, rapidly increasing in consumer power and influence. Yet despite this, Millennials remain among the least understood consumer sectors. Do their ongoing bonds to their parents demonstrate a lack of independence or simply strong family ties? Does their fluency with technology impact their trust of online consumer sources or do offline, personal recommendations still matter? What most directly drives their path to purchase?

To gain more in-depth insight into Millennials, Mom Central Consulting embarked on a groundbreaking study of 1,100 American Millennial Women. For this research, we surveyed women without children in order to glean insights from the data about Millennials as singletons. Today, with more and more women putting off marriage and kids, there’s a growing group of non-Moms from their mid-20s to early-30s who find themselves with relatively large disposable incomes.

There exists a huge amount of misinformation in the market about this generation. The Millennial shopper, as she navigates the world of digital and offline information, demands new sources and a new set of rules. Though her customer journey may seem multi-faceted and circuitous, for these women an overload of recommendations and facts is just how they like it.

Instead of a linear customer journey straight to purchase, Millennials often take the “long road” – involving inspiration, browsing, education, fact-finding, and opinion-gathering – all overlapping with one another. They embark on meandering paths of purchase that combine personal aspirations with crowdsourcing and product comparisons. They embrace a strong sense of self and believe they make their best decisions using any available information. As marketers, we see them as consumers deeply influenced by the world around them.

Our study focused on Millennials’ purchase path both online and offline, how their deep connections with family and friends impact the choices in their lives, and the effect of various types of media on their day-to-day decisions. We’ll demonstrate how Millennials differ from previous generations, and how their ability to share and crowdsource online in visual and instantaneous ways shapes their perspectives of brands, media, and relationships.

The research findings that follow paint a picture of a generation with a strong sense of self, influenced by family and peers alike, and steeped in the mosaic of the world around them.
EXPLORATION AND INDEPENDENCE

Millennials consider themselves intrepid explorers. While they’ll share very personalized stories on social media, they’re not out to establish expertise. They don’t want to be considered a “leader” or “influencer” because they focus more on egalitarian relationships or back-and-forth interactions with their friends and family. As they reach out to share their unique experiences and gather what peers have to say, Millennials are not on a personal quest to secure readers, followers, or likes. Instead, they seek out new products and new experiences, deciding for themselves what they think about them. As a result, they do not seek to build large numbers of followers as many of their leadership and soapbox-seeking Gen X predecessors.

• Only 5% consciously use social media as a platform to establish themselves as an “expert.”
• The majority self-describe as “I’m typically the first person to try new things,” and “I consider myself a real independent thinker.” (53% Strongly Agree/Agree).
• Additionally, 41% say they do not measure their personal successes against others on social media (28% do).

COOL TREND - SPOTTING AND CURATION

Millennials prefer instead to serve as advisors and consultants for their friends, peers, and family. They focus on creating and curating great content. They envision themselves as cool and trendy crowdsourcers, taking into account what friends and peers like and do online, then adapting those traits they most admire to their own lifestyle. They care about sharing what they’ve most enjoyed — whether it’s a delicious dinner at the bistro down the street, recipes for tapas they cooked for a gathering of friends, or an amazing shopping find.

• Millennials like to track their friends and families activities online with 58% sharing this information as a common use for social media.

COMING OF AGE
WHILE DOCUMENTING THEIR LIVES ONLINE

Growing up as Digital Natives, Millennials create sharable narratives through user-generated content with their opinions, purchases, and decisions. It’s a constant process of forming opinions and sharing them instantaneously using dynamic social platforms. Content creation happens at a moment’s notice — it’s become second nature to this group. They don’t see this as “influencing” or “being an expert,” but rather as living their lives in the online, social milieu in which they have grown up.

• 74% post pictures online in “real-time,” not surprising as 49% use their phone more often now than 3 years ago to access social media accounts.
• 45% post videos they create themselves, 67% share videos they discover online.
• Of the 40% who have an Instagram account, some post more than 50 times per day.

EXECUTIVE SUMMARY

INTREPID EXPLORERS:
CLUSTERED BY PERSONALITY
ATTRIBUTES
LIFE ONLINE SEAMLESSLY INTERWEAVES INTO THEIR CORE SELVES

Millennials delight in serving as creators of their own life stories, branded through the filters of Instagram, labeled by hashtags, and offered as personal updates on Facebook. They interweave photos and personal reflections to create the content of their lives, continually immersed in the immediacy of their evolving experiences.

As such, Millennials live in the center of their own branded self-networks. But for them, it’s all about self-expression, not narcissism. They use social media to announce important moments in their lives. When something good happens, they turn first to social media to share it. Every moment gets saved, publicized, and offered up for comment.

- Millennials use social media platforms to announce important moments in their lives (58%)
- 57% agree, when something good happens in my life, I share it on social media

MILLENNIALS SWIM IN TRANSPARENCY, WITH SOME CAUTION: THE MILLENNIAL PRIVACY CONTRADICTION

The very notion of privacy has changed for this generation. Social media makes everything in their lives transparent, and Millennials embrace this reality. Many assume their social communities are peers, friends and family, not strangers who may tumble upon their storytelling by search. As a result, they stick to highly personal anecdotes and opinions, designed for an audience who knows them and can place what they say in context.

- 66% place no limits on their photos, allowing them to be shared by others
- 63% share others’ posts on social media (retweets, “share” on Facebook)
- 60% tag others in their posts
- 55% place no limits on profile visibility

BUT THEY DO HAVE SOME CAUTIONS IN ONLINE SHARING

Despite their lifelong social media immersion, some areas exist where Millennials now show a bit of restraint in what they share. It becomes an example of the contradictions exhibited by this demographic and the large amount of misinformation in the market surrounding them. Of the Millennials we surveyed:

- 50% think twice before posting a status update or tweet
- 42% will never “check-in” on social media
- Only 28% post more updates now compared with three years ago to share their emotions (posting when frustrated, happy etc.)
THEY SERVE AS TREND-SPOTTERS AND ADVISORS FOR THEIR PARENTS

Millennials also feel that they serve as consultants to their parents, keeping them “cool” while advising them on the right product and lifestyle choices.

74% frequently advise their parents, making recommendations of products they like.

They serve as primary introducers for their parents to new technology (such as a tablet, smartphone, online site, app, etc.).

FACEBOOK STILL RULES FOR MILLENNIALS AS THEIR SOCIAL PLATFORM OF CHOICE

Much discussion has been made about the importance of Facebook with this generation and its future as their primary social community. Does Facebook stand a chance? According to this group, it does. While many adopt new platforms, Millennials continue to use Facebook more than any other social network.

- 92% have a Facebook account, and 42% log in/visit their page more than once a day
- 55% are on Twitter and Pinterest
- 59% have yet to create an Instagram account
- 73% do not have a Tumblr account

CLOSELY CONNECTED TO THEIR PARENTS: BOTH AS INFLUENCERS AND INFLUENCEES

Millennials remain very close-knit with their parents, maintaining daily and weekly contact and often not straying far from home. These bonds transfer to purchase decisions as well, holding parents’ opinions in high regard often over friends’ or spouses’ for large decisions.

- 50% speak with their parents every day
- 89% talk to their parents once a week or more
- 50% live less than 30 miles from where they grew up

DIGITAL CONNECTORS AND COMMUNICATORS

As Millennials have emerged as the first generation to come of age immersed in technology and social media, it’s no surprise social media and digital communication platforms have morphed into their primary communication channels. Though they are in constant touch with friends and family – it’s not a verbal communication. Their fluency with technology allows them to connect 24/7. They prefer to stay in touch with friends and family online:

Don’t expect them to answer their phones; they would rather converse via text than phone calls (52%).

In fact, 38% prefer to communicate with friends and family via social media.
PURCHASES BECOME TRANSFORMATIONAL EXPERIENCES

Millennials’ focused consumerism gives each material purchase a weight and story. Every action, every choice, every moment becomes their mirror through which others define them and they re-define themselves. From shopping to purchase path, consumerism proves just another piece of the story by which Millennials define themselves with possessions and moments and memories. In this context, products become transformed into personal experiences.

- 59% make product recommendations to others to share highly positive or highly negative experiences, and 40% make recommendations in order to help others find the right product.
- 68% agree: when I have a great or awful experience with a new brand/product, vendor, venue or service, I tell lots of other people.

Millennials tend to speak up and share when they are using a product in their everyday lives and “spontaneously” document that experience as part of their self-defining and self-branding. Sharing information becomes not in their view a “product recommendation,” but instead a candid lifestyle recommendation offered up from their unique personal experience.

CONSUMERISM BECOMES SOCIAL

Because of their penchant for sharing information, every purchase decision involves touching base with their core group. Consumerism for Millennials is an intuitive, interactive part of life – not a separate decision or private process. No wonder that 58% consider themselves very engaged in consumerism and pop culture. It virtually surrounds this generation, steeped in peers’ opinions, and their own intrepid explorations to inform their consumer behavior. Every consumer choice gets influenced by peers to the point where this influence becomes the norm.

Yet at the same time as they canvas their peers, Millennials hold strongly onto their ownership of personal choice: they don’t want to be told what to like or not like. For instance, for 1 in 2 Millennials, reading a bad review about a restaurant or retailer online would not stop them from going to/shopping at that restaurant or store.
The purchase path of Millennials contradicts itself. They live and breathe online, but also rely heavily on in-person conversations to sway their consumer purchases in key categories.

Online conversations and sources of information swirl in a continual relationship with offline conversations and sources of information. For this group – “all the world’s a stage,” both online and offline. They feed on the barrage of information served to them 24/7. Because they live in a constant state of forming opinions and sharing, they pull from disparate sources to build knowledge about a product or choice without realizing they are doing so.

This way of life goes beyond the “multi-tasking” of past generations. In fact, Millennials’ multi-integration has nothing to do with “tasks,” but is instead more of a state of being – multi-living, multi-engaging, multi-consuming. As such, they do not categorize sources of information and influence as we expect them to. Millennials prove far less linear than their older generational counterparts, constantly ensnared in a bundle of contradictions.

**Millennials Purchase Path Stands in Stark Contrast to a Traditional Consumer Purchase Path**

Our research into previous generations (Gen X and tail-end Boomers) women has shown these consumers follow a highly linear journey – from Traditional to Word of Mouth, from Awareness to Purchase:

With Millennials – it’s simply not the same. There are multiple points of differentiation where the purchase path doubles back into itself, creating layers of choice and discussion. This is where the multiple sources of information – peers, online and offline, traditional media, social media, bloggers, third-party reviews – come into play.

The consumer journey path for Millennials proves contradictory only from the perspective of older generations: what seems contradictory for some, is second nature for them.
**A CIRCUITOUS PURCHASE JOURNEY ONLINE AND OFF**

For Millennials, the purchase path looks more like a rotating cycle of mixed media and messages, depending on the category and nature of the purchase:

- **Browsing**
- **Education**
- **Inspiration**
- **Sharing/Posting**
- **Purchase**
- **Awareness**
- **Review**

It’s a never-ending cycle, a constant stream of feedback and content creation that impacts decisions based on where a consumer is standing both literally and figuratively.

**A KALEIDOSCOPE OF CHOICE**

There are two key moments of purchase choice:

1. **Emotional/Lifestyle:**
   - The choice whether to make a purchase or not; e.g., “Do I need a new car?”
   - These emotional decisions are hashed out in conversations with friends, parents, and peers, and happen both online and offline. Millennials look for inspiration - they browse, and they embark on discussions that take place anywhere, at any time - at work, on the bus, while waiting for friends in a restaurant - and simultaneously.

2. **Logical/Product:**
   - The choice of product; e.g., “Which one should I buy?”
   - After taking into account the opinions of their friends and family, Millennials then start to focus on their own needs, taking a deeper dive into category-specific brands and products. More focused fact-finding occurs in this stage, dependent on traditional media, brand websites, online reviews, brand social media recommendations and blogs, as well as peer canvassing and deep dives into product reviews. These two parallel consumer journey purchase paths may (or may not) occur at the same time. These prove not one-to-one, but many-to-many over short and long purchase cycles.

Moreover in each cycle of the path, different sources prove most influential:

**CHOICE PATH**

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<thead>
<tr>
<th>INSPIRATION</th>
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<td>BROWSING</td>
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**PRODUCT PATH**

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<th>FACT-FINDING</th>
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<td>EDUCATION</td>
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<td>REVIEWS</td>
<td>Blogs</td>
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<td>PURCHASES</td>
<td>In-Store</td>
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Moving from a Myriad of Choice and Inspiration Into the Path of Purchase

Millennials put a lot of thought into their choices. In open-ended responses, Millennials mostly talk about how they rely on themselves to make decisions regarding purchases. They often reference siblings as well.

When on a quest to buy something, they delve into fact-finding and opinion — gathering before deciding what would work best. Millennials utilize a blend of sources for complex decision-making, placing important weight on product reviews to help shape initial views into buying process. They trust blogs for education and research, but look to other online sources for reviews. Millennials do most of the upfront work online.

- 83% put a lot of thought into their purchases, ensuring they are the best choice for them/their family.
- 71% browse online for the convenience, but do the actual shopping offline, depending on the product category.

1. FACT-FINDING

Millennials don their own consumer thinking caps, gathering up diverse information about products and services.

It’s here, in the fact-finding process, where intent comes into play. Millennials dive in deeper to get the facts – searching for traditional online and offline sources of information, brand websites, and online sources. They also focus on product comparisons, having product-specific conversations with friends and peers online and offline – Do you prefer X or Y? Should I go with product A or B?
At this stage in the purchase path, Millennials are more trusting of the facts on product websites than personal recommendations or reviews. Brand websites allow Millennials to dig into product information and specifics, as well as pricing, and they use these product facts to evaluate alternatives. In contrast, Boomers and Gen Xers are less likely to do this as they perceive inherent marketing wrapped up in brand-owned media, not trusting the bias. But for Millennials, they regard owned media as the top source to find neutral, unbiased product data.

- The majority, 71%, trust the product website to speak for itself.

2. PEER EDUCATION: OPINION-GATHERING

Opinion-Gatherers and Contextual Decision-Makers

Peer education proves a hallmark of the Millennial path to purchase. They seek out blogs, social networks, as well as ask, “What do my friends think about this decision? What do my parents think about this decision?” Their offline and online conversations focus on seeking opinions from those in the know and who have used a product or service.

- 87% trust products after “doing their own research” – involving heavy crowdsourcing among their peers.
- 93% have purchased a product after hearing about it from a family member or friend.
- 89% trust recommendations from a friend, peer, or family member more than recommendations from a brand (11%).

Friends and Peers Reign Supreme

Millennials rely on Smartphones not only to browse websites, but also to obtain opinions from family and friends. Peers, friends, and co-workers act as the key set of influencers for Millennials. Peer-to-peer networks and relationships dominate their life choices. Friends ask each other’s opinions and they share their personal takes. For instance:

- When making technology purchases (computer, cellphone, tablet, etc), Millennials rely most on their friends’ advice (66%), over their spouses’/significant others’ advice (59%), or parents’ advice (37%).
- When making clothing, shoes, and personal care item purchases, Millennials rely most on their friends’ advice and recommendations (65%) over their parents’ advice (55%) or that of a spouse or significant other (52%).
- Online peer reviews, at this phase in the path, factor in highly when making a purchasing decision. At the moment of purchase, peer reviews factor in more heavily than other sources.

In-Person Recommendations Carry the Strongest Weight

Millennials want to follow up on recommendations by hearing about them personally from the person doing the recommending. Thus, in person word-of-mouth recommendations prove most influential in all purchasing categories for Millennials:

- Food/beverage (68%)
- Vacations (67%)
- Household products (63%)
- Tech (62%)
- Clothing (62%)
- Décor (53%)

Mom and Dad Still Matter for Big Purchases

- 66% of Millennials frequently seek their parents’ guidance when making large purchases (house, car, etc.).
- When gathering advice from multiple sources, Millennials rely most on their parents’ advice (80%), over their spouses’ or significant others’ advice (61%), or friends’ advice (35%). Siblings’ opinions factor in heavily as well.
- 47% often go shopping with their parents.

Celebs No Longer Loom Large but Brands Still Key

Fame has little sway on final purchases and only marginal reach when it comes to awareness about a new product. While brands have bridged the gap with the Millennial demographic, finding a way to live both within and outside of their social communities, celebrities remain far removed:

- 68% of Millennials remain unfazed by a celebrity spokesperson’s influence when promoting a brand/product.
• Only 19% tag celebrities in social posts but 45% will tag a brand. 56% say the frequency with which they tag brands has not changed in the last three years.

Brand Connections: Not Looking for Engagement or Accessibility

In fact, because Millennials don’t have the same innate distrust of brands that previous generations did, they’re more willing to connect with and make brands a part of their social communities. But bear in mind, connecting does not mean welcoming them into the conversation. Millennials expect brands to be a resource when they need them, but only then. Most find engagement intrusive and unwelcome. Unlike previous generations, Millennials don’t seek brand engagement or search out ways to generate access to brands. Even when friends follow certain brands, Millennials still don’t follow suit. The comparison angle, the “look what others are doing” angle, doesn’t work with this crowd.

• 66% follow brands on social media, yet only 41% enjoy when brands interact with them online.
• Of the 66% that follow brands on social media, 76% follow brands on Facebook and 11% follow on Twitter.
• Less than 10% follow brands on Pinterest or Instagram. Less than 1% follow brands on Google+ or Vine.
• 38% find brands more accessible and trustworthy when engaging in social media rather than traditional advertising.
• 60% follow brands on social media to learn about new deals and coupons.
• Only 20% follow brands on social media because their friends are following those brands.

3. PRODUCT REVIEWS

Third-party online reviews factor heavily into this stage of the purchase path. As decisions narrow, Millennials go directly to sites, such as Amazon.com, to search specifically for products with the highest number of reviews.

• Millennials crowdsource their purchases online – seeking the most trusted source, with the highest amount of reviews, while searching for products with the highest positive ratings and purchase.
• When it comes closer to a decision to purchase a particular product, Millennials turn to online reviews to see how they map to their friends’ and parents’ recommendations.

Reviews

• 93% of Millennials either always or sometimes read online reviews prior to buying a product.
• When doing research via a search engine about a product they are considering buying, 48% of Millennials are most likely to click on a retailer website (Amazon, Target), and 32% are likely to click on a brand website.
• Millennials research products online prior to purchasing:
  • 36% say they always read recommendations about products prior to purchasing.
  • 57% say they sometimes find online reviews helpful for certain purchases.
• Consumer reviews from third parties factor high into purchase decisions.

Trust

• 49% of Millennials trust blogs when conducting online research, 47% trust e-commerce reviews and 47% trust social media recommendations.
• The difference in the depth of trust is huge when it comes to anonymous online reviews: 97% trust e-commerce sites like Amazon and Target for product reviews over a review on the brand website (77%), blogs (82%) and third-party sites (71%).

4. PURCHASE

The digital convergence continues even at the point of purchase. Millennials text while in-store, sharing pictures and thoughts, and turn to digital devices when finalizing a spend. Because they live in a world where they are always tuned in, they don’t see any limits in where or how they shop. Coming
VALIDATION AT THE POINT OF PURCHASE

Between traditional media, social networks, blogs, websites (including e-commerce sites, newsletters, and brand sites), and in-person recommendations, what influences Millennials’ purchasing decisions at the moment of purchase? It turns out that it depends on what particular categories they’re shopping for:

- **Clothing**: In-person recommendations, websites (e-commerce sites, brand sites, etc.)
- **Food/Beverage**: In-person recommendations and traditional media
- **Large-ticket items (cars, appliances)**: Websites (e-commerce sites, brands etc.), in-person recommendations
- **Technology**: In-person recommendations, websites (e-commerce sites, brands etc.)
- **Vacations**: In-person recommendations, websites (e-commerce sites, brands etc.)
- **Décor Items**: Websites (e-commerce sites, brands, etc.), in-person recommendations
- **Household Products**: In-person recommendations, websites (e-commerce sites, brands, etc.)
- **Traditional Media**: Food/beverage items and household products
- **Social Networks**: Food/beverage items and décor
- **Blogs**: Décor and technology
- **Websites**: Technology, vacations, large-ticket items
- **In-person WOM recommendations**: Food/beverage items, large-ticket items, vacations

Millennials Browse and Shop Online

- They use tablets (61%) and smartphones (52%) to make online purchases.
- Clothing, technology and home goods are the categories most often searched for and purchased online.
- 69% of Millennials purchase from online Big Box retailers (e.g., Target.com), and 34% purchase from brand sites (e.g., HM.com) at least once a month, with only 20% purchasing from online discount boutiques (e.g., Gilt, Rue La La) and 31% from couponing sites (e.g., Groupon or Living Social).

Couponing: Great if Found Online, but Not Determinative to Purchase

Millennials consider coupons great if they can find one online, but do not depend on them for purchase.

- 60% follow brands on social media to learn about new deals and coupons.
- Yet, overall, 58% use online coupons most or some of the time, and only 13% use coupons for online purchases all the time.
- Millennials use coupons offline even less than online. They are less likely to use coupons in-store.
New Categories Needed to Define This Influential Generation

Millennials don’t fall neatly into buckets – thus as marketers we must redefine how we categorize the purchase path. The difference looks like this: for Boomers and Gen X, purchase proceeds along a mostly linear pathway. 1. “I need to buy a stove.” 2. “Which stove do I want?”

But Millennials take a much more circuitous path. They see an ad on TV, search online for additional information, compare their top three choices based on online reviews and recommendations, chat with friends who may have the same stove, go to the store to compare pricing, and then choose a product. They may love a brand or hear great things about a brand’s reputation, and that also factors in to their decision-making process.

Having spent their entire lives with technology and connection at their fingertips, Millennials’ expectations of brands are higher than any demographic that’s come before them. Headlines pointing to them as self-serving and narcissistic do this group a great disservice. Millennials simply expect brands to keep up with their ‘tuned-in’ lifestyles and avenues of communication.

Why Do Millennials Spend So Much Time On Social Media Without Building Substantial Followings?

In stark contrast to the Gen X demographic above them, Millennials do not act so much as broadcasters, but rather as responders. A crucial distinction emerges when brands engage Millennials in marketing campaigns. Millennials often linger in standby mode: transmitters that just need to be tapped or inspired to say something, not just given a task. When engaged in brand campaigns, the experiential give/get with this group proves key. Millennials are driven by experience and opportunities, not by gift cards or brand products. They’d rather be sent off on an adventure, challenged to come up with their own cooking creation, or dine out at a cool restaurant, than be paid for their efforts.

If you ask for an opinion they will offer one, but they don’t just offer recommendations for products until immersed in a moment with that product or service. They tend to speak up and share when they are using a product in their everyday life and can “spontaneously” document that experience as part of their self-defining and self-branding. Sharing information becomes not in their view a “product recommendation” but instead a candid lifestyle recommendation offered up from their unique personal experience.

More Insights for Brands Looking to Crack the Millennial Code

- When it comes to traditional media, Millennials are not necessarily skeptical. Millennials know they are being targeted, and they don’t mind. They just keep it within their own personal perspective.
- They develop loyalties at a specific product level, not at a larger brand level.
- Brands should create visually engaging online destinations as a means to connect with this generation.
METHODOLOGY

Mom Central Consulting recently surveyed 1,100 American women without children who were born between the years of 1979 and 1993 via an email invitation and an online survey. The extensive study was conducted, programmed, and analyzed by Mom Central Consulting’s Consumer Insights Group, headed by Tracey Hope-Ross.

ABOUT MILLENNIAL CENTRAL

Millennial Central®, a division of Mom Central Consulting, specializes in reaching the influential female Millennial market. Leveraging a deep understanding of this emerging demographic, MC partners with national brands to build advocacy through powerful first-person word-of-mouth programs. Capabilities span strategic counsel, blogger engagements, visual influencer campaigns, social media activations, in-market events and research – all targeting Millennial influencers.

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ABOUT MOM CENTRAL CONSULTING

Mom Central Consulting, the leading social media consulting firm focused on the Mom Market, partners with over 200 brands each year to develop powerful influencer marketing programs targeted to Moms. With offices in Boston, Chicago, New York, and Toronto, Canada, Mom Central Consulting delivers cutting-edge social media and digital campaigns – engaging influencers as passionate brand advocates – to achieve focused marketing results. Our robust Mom Central Testing Panel garners real-world insights throughout the Mom Marketplace, which informs our ROI-driven campaigns. For the past three years, Inc. magazine has named Mom Central Consulting to its annual Inc. 500|5000 list of the nation’s fastest-growing private companies.

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