



2016 New Mover Report

Custom research shows marketers what new movers are buying, what's influencing their purchasing decisions, and how to take action



We understand what moves people.

For more than twenty years, Epsilon has compiled and analyzed the trends of new movers. Our custom research helps marketers understand new movers' lifestyles, attitudes and behaviors, so they can connect with them on a deeper level.



According to the U.S. Census Bureau, 11.6% of the population moved between 2014 and 2015.¹ The average American household moves every five to seven years and can expect to move an average of twelve times during their lifetime.² Those households typically spend \$9,000 on goods and services, new credit cards, financial products and insurance products.³ In fact, a recent Zillow survey found that 21% of movers spend \$10,000 or more on products and services as a result of their move.⁴ Getting in touch with households in the weeks and months around the move is a lucrative opportunity for brands to introduce their products to prospective customers, extend their relationships with existing customers, and capture their share of move-related spending.

 **12%** of Americans move every year

 The average household moves every **7 years**

 A household that moves typically spends **\$9,000** on goods, services, financial and insurance products

For our custom research, we surveyed 740 households that had recently moved to gain deeper insight into their moving-related purchases and services, sources of information influencing these purchases and services, and the timing of their decisions.



We uncovered several insights essential to every marketer's strategic plan to target new movers:



New movers' top three sources of information about companies and services are: personal contact with the vendor (driving around the neighborhood or visiting companies), friend and family referrals and internet searches. Marketers need to tailor strategies, messaging and channels to complement and capitalize on these sources.



Nearly three-quarters of new movers make major move-related purchases (furniture, electronics and appliances); the target window to influence these decisions is two months before the move and two months after.



Many new movers are cutting the cord from landline to mobile phone only, particularly in the younger demographic. Some are also walking away from cable, satellite and wired TV. Marketers have a finite window to influence this decision—within three months prior to the move. There are also opportunities for loyalty rewards post-move.



In today's omnichannel environment, new movers use many different channels for information gathering and decision-making. Marketers need to be active across channels and optimize their channel mix to the demographic base they are targeting.



Epsilon offers a range of products and services to capitalize on new movers' attitudes, behaviors and trends: Target NewMover, Target PreMover 2.0, Market Trend propensity models and digital services.

what's *your* next move? →

Decisions, decisions

Major Purchases

Nearly three-quarters of new movers (71%) report making a major move-related purchase. Like last year, furniture topped the list (51%), followed closely by appliances (48%) then electronics (29%). More than 60% of these purchases were made after the move, with the bulk of these made in the two months after moving (56%). The biggest influence for these purchases was visiting a company/business in person (43%). This was followed by internet searches/websites (22%) and recommendations from friends and family (10%).

Your move:

Contacting new movers just before or within the first two months after their move is critical. Your visuals and messaging should promote convenient location and focus on incentives for an in-store visit.



Moving company

Approximately one-third (37%) of the new movers surveyed report using a moving company. This was more prevalent for those over 50 (45% vs 23%) and for smaller households. The majority (74%) started looking for a moving company within two months of moving date (27% less than one month, 47% one to two months before). Their biggest influences were recommendations from friends and family (24%), internet searches/websites (23%) and calling a company/business (19%).



Storage facility

Just over a quarter (28%) of new movers report using a storage facility. Most (62%) started looking for a storage option within two months of moving date (33% less than one month, 30% one to two months before). Their greatest influences were internet searches/websites (30%), visiting a company/business in person (18%) and recommendations from friends and family (15%). A very small number of new movers (5%) used a storage option on their property (e.g., Pods).

Your move:

To maximize new movers' use of the internet, make sure your website is SEO optimized, that locations and phone numbers are prominently displayed, as are strong calls to action (CTAs). Your cross-channel campaigns should promote brand awareness with CTAs that drive traffic to the site in time for new movers to make a purchase decision. Display ads and retargeting are another consideration.

To capitalize on the friends and family angle, make it as easy as possible to share your products and refer your brand across all channels. Create a cross-channel referral campaign using in-store signage, direct mail and email. On your website and emails, emphasize social share icons and refer-a-friend buttons and promote online reviews and testimonials.

Major purchases made for current home

couch or sofa
computer
other electronics
outdoor furniture
dryer
other furniture
washing machine
other appliances
bedroom furniture
kitchen large appliances
kitchen small appliances
table or chairs
television

Grocery

More than half of new movers indicated shopping at a different grocery store (68%), but nearly half of those were the same brand but different location. The vast majority made grocery-related decisions in the two months after moving (70%). Their biggest influences were visiting a company/business in person (29%), driving around the neighborhood to see what's available (29%) and recommendations from friends and family (16%).

Your move:

Personal contact at the right time is key to winning over the shopping cart. Target new movers right at the time of move, since 70% select their grocer in the two months after move. Also, consider re-mailing consumers in the few months following move when the window is wider for discovery of new shopping locations. Your creative should promote convenient location and focus on coupons for an in-store visit.



Casual Restaurant

The majority of new movers (60%) have eaten at a casual sit-down restaurant near their home (that they had never eaten at before). Again, personal contact is the biggest influence: new movers reported driving around the neighborhood to see what's available (29%), recommendations from friends and family (27%) and visiting a company/business in person (20%).

Your move:

Again, these new movers want to see and experience for themselves by exploring their new neighborhood and visiting restaurants in person. Your messaging should promote convenient location, focus on incentives for a restaurant visit, and make friend and family referral incentives compelling and easy to use.

Pharmacy/Drug store

Most new movers reported visiting a pharmacy/drug store since moving (86%). Many (65%) went to a different pharmacy, but 38% of this group stayed with the same brand but at a different location.

Doctor/Physician

More than half of new movers (59%) stayed with their current doctor/physician following the move. A quarter got a new doctor, while 12% were still looking. The bulk of physician-related decisions were made after moving: 67% in the two months after moving and 12% in the three to six months after moving. The greatest influences for new doctors were recommendations from friends and family (29%), checking insurance company's website (22%), calling insurance company for information (14%) and online information (14%).

Your move:

Moving is an optimal time for physicians to build relationships with new patients/customers. Marketers should consider multiple touchpoints for the six month period following a move when most decisions are made. These should include friends and family referral messaging, as well as push to website containing robust practice, contact information, and easily accessible insurance information.



Change of services/utilities

Telephone

The majority of new movers (58%) only have a mobile phone, while more than a third (38%) have both a landline and a mobile phone. Of the 58% with mobile phone only, 34% had a landline prior to moving. A majority of this group (63%) made the decision to eliminate the landline within three months before the move.

Television

Cable TV covers the majority of television services used (51%), followed by Netflix (31%) then Satellite TV (24%). As expected, Netflix or other internet streaming services have greater usage among younger responders (57% of households where responder age was 18-39). About one quarter of responders over 50 also indicated Netflix/other streaming was used. Of the 18% who do not have cable, satellite or wired TV, 46% did have one of these services prior to moving and nearly half decided to cancel their service within one month before the move.

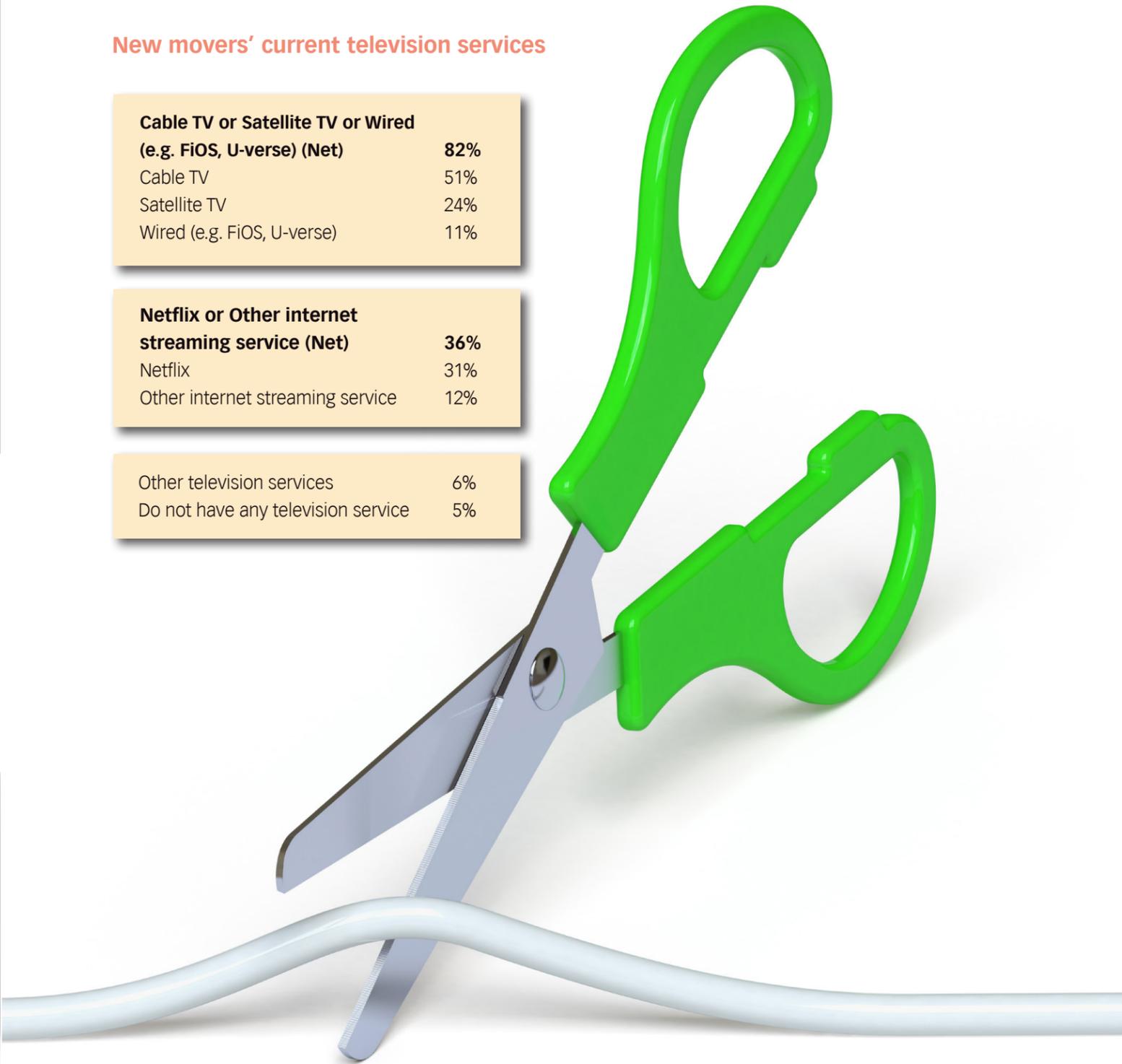


New movers' current television services

Cable TV or Satellite TV or Wired (e.g. FiOS, U-verse) (Net)	82%
Cable TV	51%
Satellite TV	24%
Wired (e.g. FiOS, U-verse)	11%

Netflix or Other internet streaming service (Net)	36%
Netflix	31%
Other internet streaming service	12%

Other television services	6%
Do not have any television service	5%



Your move:

There is a window of opportunity pre-move to keep these movers from "cutting the cord". Messaging to existing customers should affirm their decision to stay with the current provider. For competitors' clients, this is a prime opportunity to target with competitive offers and to tout service/product benefits.

Moving related sources, influences and attitudes

To get a better understanding of influences on move-related purchases and services, we asked respondents, "If you could only pick one source, which had the biggest influence?" for the following products and services. The adjacent chart summarizes the results.



Top influences on moving-related decisions

↓	MOVING COMPANY	STORAGE FACILITY	MAJOR PURCHASES	GROCERY STORE	CASUAL RESTAURANT	DOCTOR/ PHYSICIAN
Online (Internet searches or websites, online reviews, and banner ads)	32%	35%	28%	5%	15%	14%
Asking friends or family	24%	15%	10%	16%	27%	29%
Calling a company/ business	19%	14%	1%	–	<1%	3%
Driving around the neighborhood to see what was available	<1%	14%	4%	29%	29%	2%
Visiting a company/ business in person	4%	18%	43%	29%	20%	6%
Checked my insurance company's website	–	–	–	–	–	22%
Called my insurance company for information	–	–	–	–	–	14%

Your move:

Offers that go to new movers should focus on getting them in the door. Invite them in while they explore the neighborhood and highlight the convenience of location (vs x% off offers). Develop creative that makes it easy to "refer a friend" since asking friends and family is so prevalent.

Attitudes about information sources

When thinking about moving-related sources, not surprisingly, the internet is a leading information source due to its speed. This was followed by a preference for talking to someone in person to ask specific questions.



New movers strongly agreed or somewhat agreed with the following statements:

77%

"I used the internet for move related information because it was the fastest."

75%

"I preferred to talk to someone in person about move related topics because I could ask more questions that applied to me."

70%

"I kept move related information to refer back to when I was ready."

59%

"Online information was more helpful than what I received in the mail."

Your move:

Again, in-person contact was important to new movers, reinforcing that marketers need to drive and enable personalized connections. Websites should include a Live Chat capability and/or promote an easy way to reach a live customer service representative on the phone. For those movers who keep move-related information to reference, consider creating a tangible reminder such as a reference card or refrigerator magnet with contact information.

The perception that online information is more helpful than info received in the mail presents an opportunity for direct marketers. Re-evaluate your DM messaging to determine: Is it relevant? Is it addressing new movers' needs and concerns? Does it tie-in to what you are saying in the digital channels? Is there a strong call-to-action? Online and direct channels should complement each other in your marketing strategy.

To mail or not to mail?



Attitudes about mail

The majority (69%) of new movers agreed that they enjoy checking the mailbox for postal mail and 41% pay more attention to information received by postal mail than if it was received by email. Nearly a third (31%) felt that move-related information received by mail was the most convenient to read, and 18% felt that move-related information received by mail was more trustworthy than information online. Clearly, direct mail is a lively and active channel. Its numerous benefits include tangibility, a proven high open rate, and the ability to drive measurable and consistent results.

Your move:

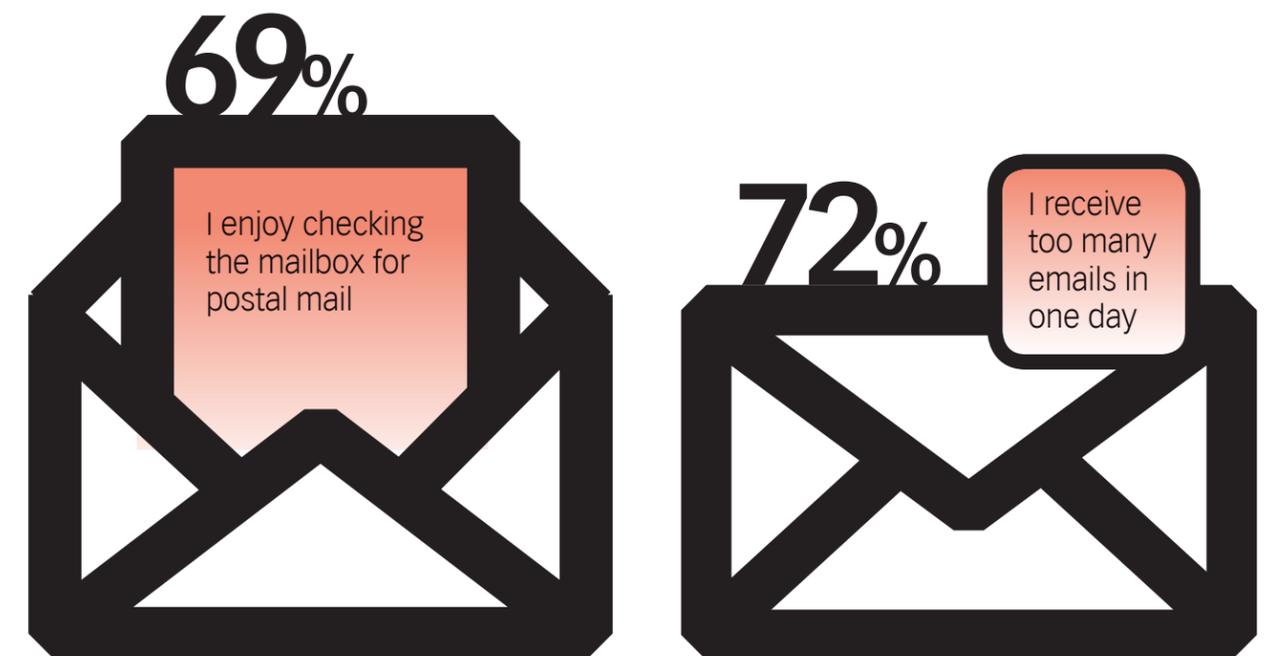
Marketers need to optimize their direct mail messaging and cadence.

Attitudes about email

The majority (72%) of new movers felt that they receive too many emails in one day and even more (75%) receive many emails that they don't open. While nearly half (44%) of new movers felt that move-related information received by email was the most convenient to read, the email inundation factor seemed to outweigh the convenience factor.

Your move:

Given the large volume of emails consumers are receiving, marketers need to stand out in the inbox by remaining highly relevant to the consumers they're targeting. Make sure to test subject lines, stick to the fundamentals of good email design, and promote relevant offers.



Make your next move with Epsilon

By anticipating move-related buying behavior, marketers can tailor their messaging and capture a larger share of wallet from the tens of millions of movers every year. **Epsilon offers several data and analytic solutions specifically designed for this purpose.**



Target PreMover 2.0

Target PreMover 2.0 leverages our vast consumer data to help target the best households that are most likely to spend in the months leading up to their move. Households consider the following in their pre-move timeframe: renewing or establishing cable, internet and satellite service, new insurance, new mortgage, home security, shopping—online or offline—for new home furnishings. With Target PreMover 2.0 you can accurately target those households with a move on the horizon and market to them with relevant messages and timely offers.

Target NewMover

Use Target NewMover data to out-market your competitors by targeting new movers at their peak buying time:

- > Over 1.3 million monthly new movers
- > Up to 400,000 weekly new movers
- > Multiple source types
- > Used across industries for brand recognition and introduction of services to consumers new to a local area

Market Trend models

Epsilon offers propensity models such as Cable Bundle (cable, internet, home phone), Cord Cutters, Satellite Bundle (satellite, internet, home phone, wireless phone), Cable TV Premium Subscribers, VoIP Landline Phone Users, Wired Line Video Connectors, and Wired Service Owners which may be helpful when used in conjunction with the Target NewMover product. For retail purchases that happen before the move we offer Web and Brick & Mortar Viewer/Online Purchaser, Web Surfer/Brick & Mortar Purchaser, and Frequent Mobile Purchasers models to hone in on movers' shopping preferences.

But that's not all. We fuse data, technology, creative and media to connect with your customers in the moments that matter to get the results your brand needs.



Marketing data

We understand your customers' lifestyles, attitudes and behaviors, and connect with them on a deeper level



Insights & strategy

We step into your customers' lives and see things as your customers see you



Digital

We make smarter more effective connections between your brand and your customers



Creative services

We engage customers with fresh intelligent creative that connects them to your brand at an emotional level



Media reach

We source and select the right media, so you know you're reaching your audience in the right way



Integration & implementation

We make it all work together - seamlessly

Appendix: Methodology

Epsilon's Target NewMover file was used to select U.S. households whose move was reported in the October 2014 to October 2015 timeframe. Epsilon's proprietary consumer panel was used to invite households to complete a customer survey on the topic of moving experiences. The data was collected from 740 households from November 13 to November 23, 2015. Results are shown for the total sample and/or by demographic groups.

Responders were split in their role of purchasing household products and services, with about half being the sole decision-maker on household purchases and the other half sharing the decision with someone else. They were also fairly evenly split between owners (45%) and renters (55%). More than half stayed fairly local in their moves: 25% in the same city, 23% in the next city over and 8% in the same neighborhood. Of those who moved further, 25% went to another state and 18% were further away, but in the same state.

Responders had lived in their current home for various lengths of time: 56% had lived in their current home for fewer than 6 months and 44% for 7-11 months. The responders were overwhelmingly female (82%), 50+ years of age (64%), and married (58%). The average household income among responders was \$60K, with 10% qualifying as high-income families earning \$100K or more.

Demographic trends

Demographic segmentation of the survey responses uncovered the following trends:

- > Those under 50 are more likely to use online sources such as internet searches, websites and online reviews when making move-related purchase decisions.
- > Those over 50 are more likely to favor people sources and word-of-mouth by visiting a company or business in person and asking friends and family for recommendations.
- > Those with a higher income (defined as \$100K+) were also more likely to favor visiting a company or business in person.
- > Interestingly, although those under 50 were more likely to rely on online sources, more respondents under 50 (than over 50) agreed with the sentiment 'Move related information received by mail was more trustworthy than information online', indicating that direct mail still plays a powerful role in influencing this younger demographic's decision-making.

Sources:

1. U.S. Census Bureau Current Population Survey Annual Social and Economic Supplement, 2015. <http://www.census.gov/>
2. <https://www.census.gov/hhes/migration/about/cal-mig-exp.html>
3. Epsilon 2012 Epsilon New Mover Report
4. <http://www.zillow.com/blog/zillow-mover-study-movers-spend-thousands-on-cars-tvs-cellphones-etc-85997/>



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About Epsilon

Epsilon is the global leader in creating connections between people and brands. An all-encompassing global marketing company, we harness the power of rich data, groundbreaking technologies, engaging creative and transformative ideas to get the results our clients require. Recognized by Ad Age as the #1 World CRM/Direct Marketing Network and #1 U.S. Agency from All Disciplines, Epsilon employs over 7,000 associates in 70 offices worldwide. Epsilon is an Alliance Data company. For more information, visit epsilon.com, follow us on Twitter @EpsilonMktg or call 1 800 309 0505.