# 2011 Shopping Rituals of the American Mom

A **21**<sup>ST</sup>CENTURY**MOM**° Insights Series



**Shopping MmM** 

### **Methodology**



### BabyCenter community:

- Social Listening in BabyCenter community
- Guided online discussions
- Analysis of conversations across Moms stages using our TalkTracker<sup>TM</sup> tool which measures trends in aggregate across specific product categories



### In-depth surveys:

- 21<sup>st</sup> Century Shopping Rituals Survey of moms vs. general online population (comScore panel for gen pop)
- 21st Century Mom<sup>®</sup> Shopping Rituals Series of moms specifically
  - 9 category specific surveys ranging from auto, travel, finance and home improvement



### Behavioral & Secondary:

- comScore analysis:
  - Moms online purchasing compared to gen pop
  - Moms offline purchasing compared to gen pop
- Secondary research sources on market sizing and purchasing power





- The transformation of motherhood
- Her impact across categories
- 7 shopping rituals of The 21st Century Mom®
- 4 Marketing implications



## Motherhood creates new shopping rituals

\$227K

Average cost of raising a child

She's not just buying for herself anymore

73%

Change purchasing criteria when becoming a mom

She's reconsidering her needs...and brands



New roles require faster, cheaper & smarter solutions

She's leveraging digital tools in new ways

### **Meet your customer**

34M

Online moms with children 8 or under

\$2.1T

Spending power of US moms annually

1 in 4

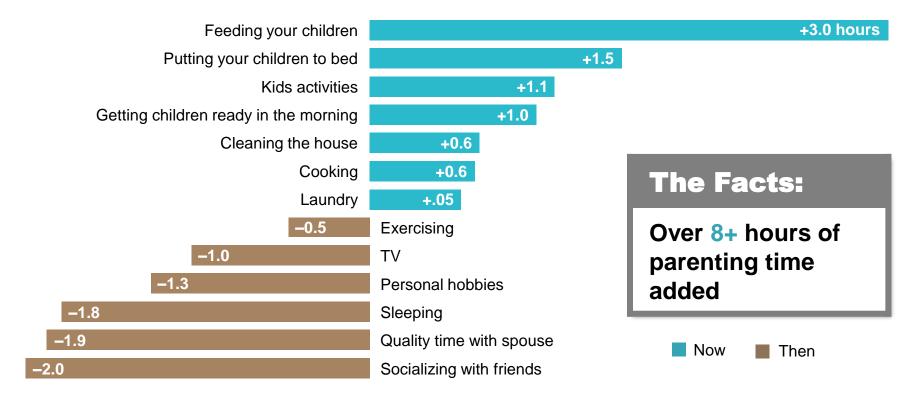
**New children born to US Hispanics** 

### **Becoming a mom**

It changes everything forever...especially how she spends her time

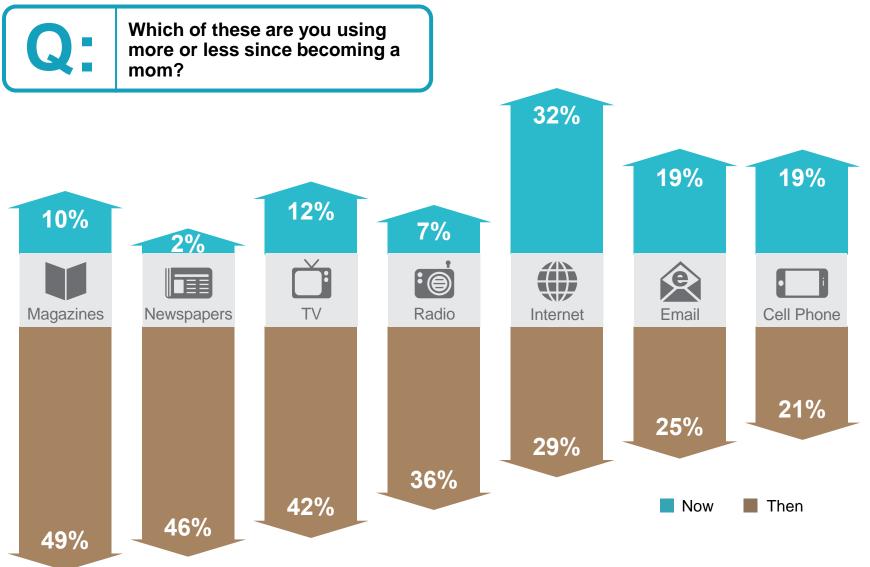
Q:

Before & after becoming a mom, how much time do/did you spend on average per day doing these activities?





### It changes the way she uses media





## Shopping mindset – faster, cheaper, smarter





Which of these words describes the way you feel when shopping?







## From self-expression to low maintenance

### Importance of each purchase criteria

THEN	NOW
63% Reflects personality	80% Price
63% Scent, fragrance	77% Safety
58% Safety	72% Low maintenance looks
57% Price	61% Scent, fragrance
51% Brand	58% Efficacy
48% Trendy, hip	56% Reflects personality
46% Low maintenance looks	51% Doctor recommended
44% Efficacy	35% Brand
34% Doctor recommended	30% Organic
20% Organic	28% Trendy, hip

Before, during and after pregnancy I have been committed to natural body products for things that go on a lot of my body OR in critical areas- like my lips.

-BabyCenter Mom

Compared to before, which brands do moms feel best fit their personal care or beauty routine?













### From design to comfort

### Importance of each purchase criteria

THEN	NOW
92% Design / look	95% Comfort
82% Self-expression	95% Price
82% Color choice	86% Versatility
77% Sex appeal	86% Ease of cleaning
65% Price	83% Durability
59% Head-turning	78% Design
59% Comfort	70% Color choice
54% Versatility	61% Self-expression
49% Durability	29% Sex appeal
46% Designer brand	25% Eco-friendly

After I had my second baby, I couldn't wait to cut my hair and put on some fun clothes for date night with DH – was so done with maternity wear!

-BabyCenter Mom

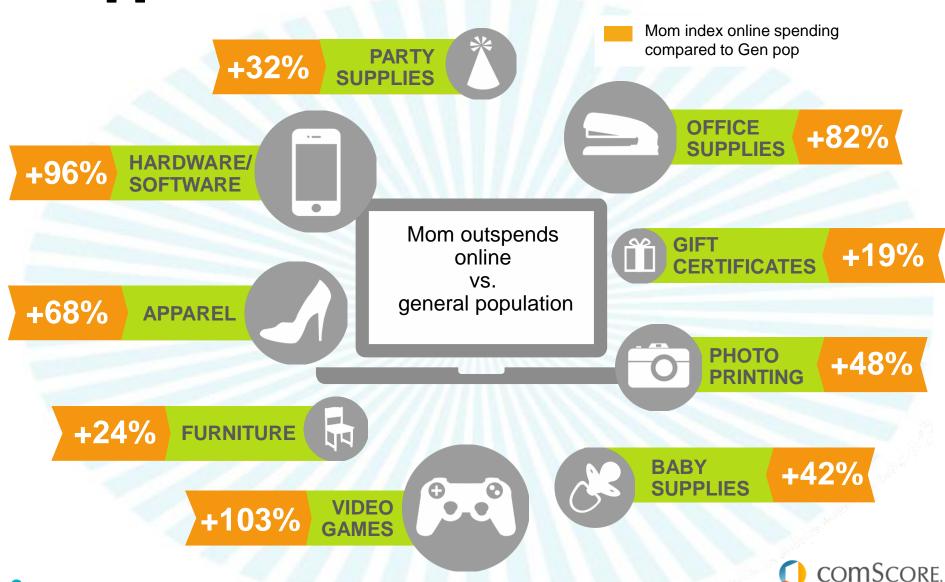
Compared to before, which brands do moms feel reflect their personality?





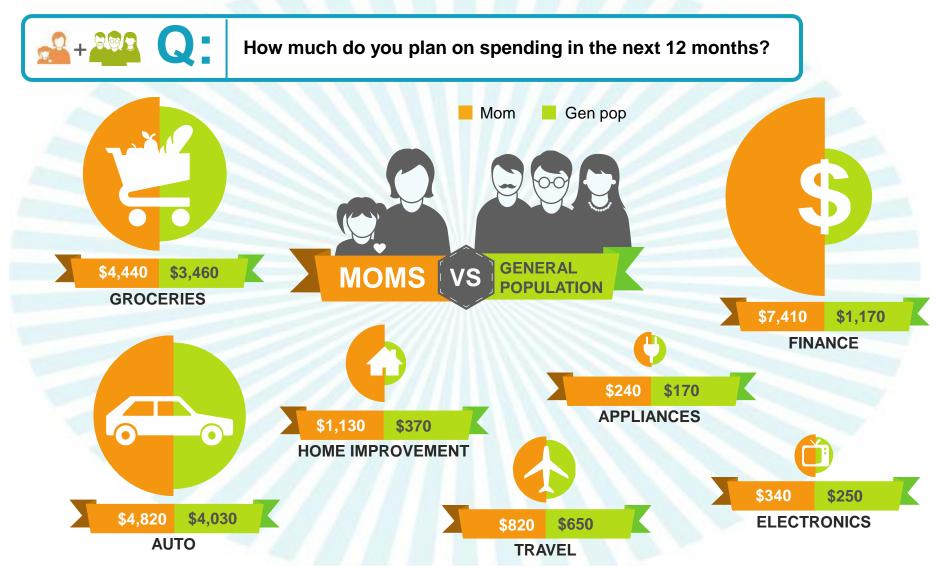


# Mom spends significantly more to support new roles





# She also plans significant future spending





### Mom is a shopping super-hero

#### Meet her sidekicks



7x growth in usage of social media over past 5 years

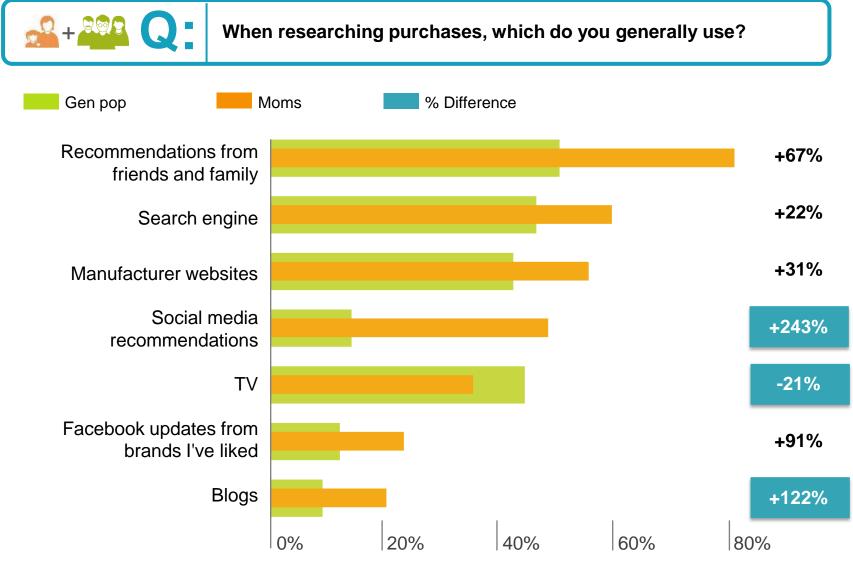


40% have shopped via a mobile browser (+60% over gen pop)



39% say their time online is the most peaceful time of their day

### Social and mobile are her key tools







- RITUAL 1
  - She shops around

    Mom knows options are only a click away
  - RITUAL 2 She shops for sport

    Mom has a passion for saving
  - She reads the labels

    Mom feels responsible for family health
  - RITUAL 4 She demands convenience
    Mom puts her money where her mouth is
  - She enlists new help

    Mom puts pixels and partners to work for her
  - She expects more from retail
    Mom embraces stores that cater to her
  - RITUAL 7 She puts the calendar to work

    Mom uses milestones to trigger purchases

Shopping Market Market

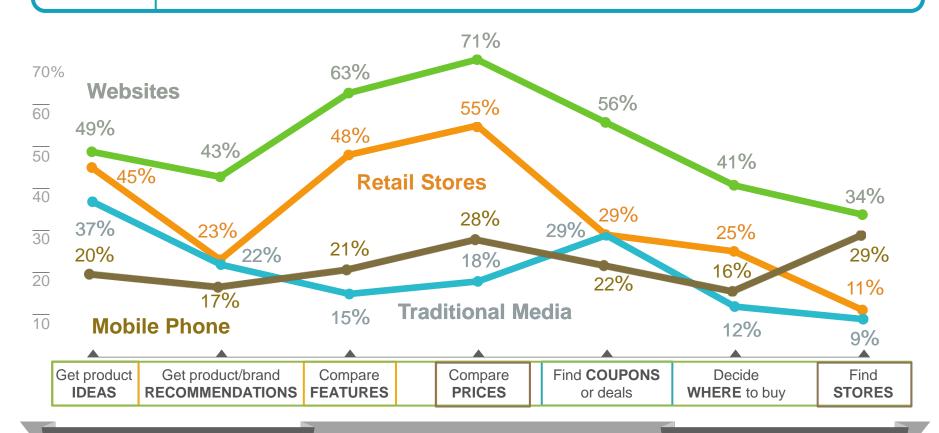
What this means for you



### Social and mobile are her key tools

Q:

How did you use or do you plan to use each of the following resources throughout the shopping process?







### **Shopping online is mainstream**

3 in 4

**Shopped online past 30 days** (145 index)

2 in 3

Made an online purchase past 30 days (144 index)

1 in 2

Would do *all* shopping online (151 index)

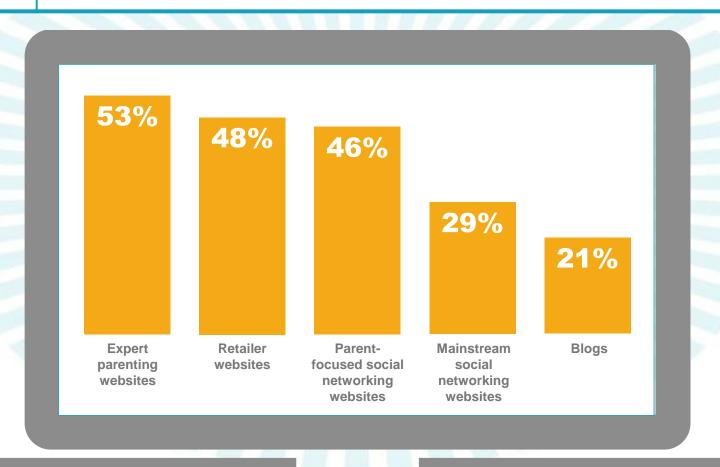
Let's put it this way, I recycle A LOT of cardboard!!! I do 90% of my shopping online, in the past 10 years I literally have not shopped once in the stores at Christmas time, not ONCE!

-BabyCenter Mom

# Web and social are her recommendation engines

Q:

Apart from talking live...where do you go to get product reviews or recommendations from other parents?





## Moms shop around for travel

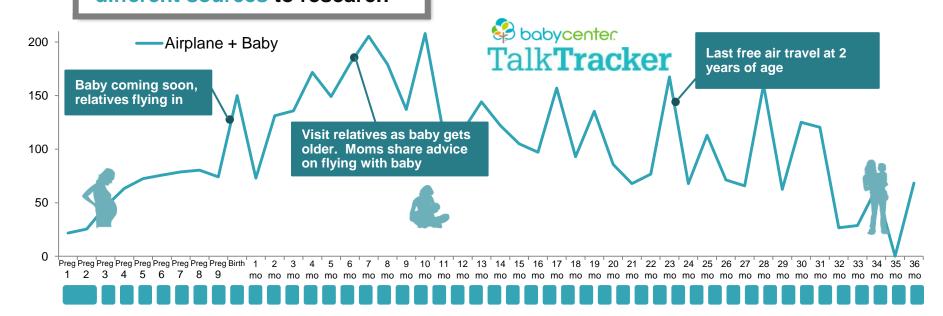
#### **The Facts:**

83% always look for a deal for travel

On average they use 4 different sources to research

How soon a baby can travel by air? I was booking a ticket and the airline won't take infant without date of birth. Anyone know how to get a photo id for a newborn and how much time it takes here in the US?

-BabyCenter Mom





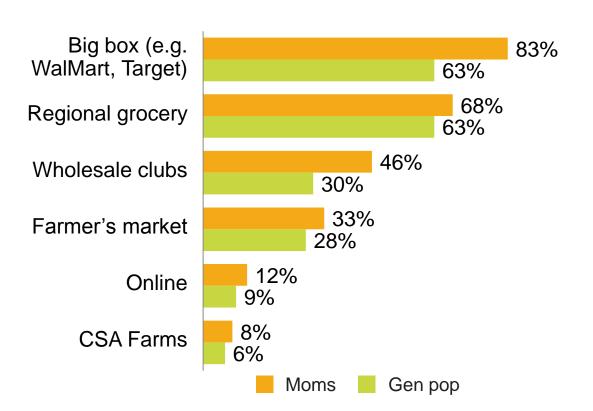


# Moms shop in a wide variety of places





Where have you bought groceries and household supplies in the past month?



#### **Fast Facts:**

63% more likely to shop at wholesale clubs

32% more likely to shop big box retailers





# Moms want to check more off the list

Q:

When you shop for groceries at a store like WalMart or Target, which of the following unplanned purchases are you likely to make?

	☐ Household item: 64%
F	<ul><li>Snacks: 46%</li><li>Shoes or clothes for child: 41%</li></ul>
1	Toy for child: 36%
	Cosmetics for myself: 28%  Clothes for myself: 23%
-	Clothes





# **Shopping Mom Insight: She shops around**

Insight:

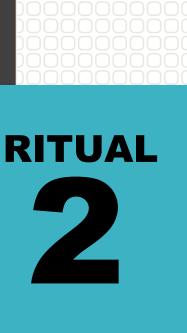
Mom's path to purchase has evolved

She's using a variety of tools and services to get the job done

**Action:** 

Plan digital, mobile and in-store marketing as complementary

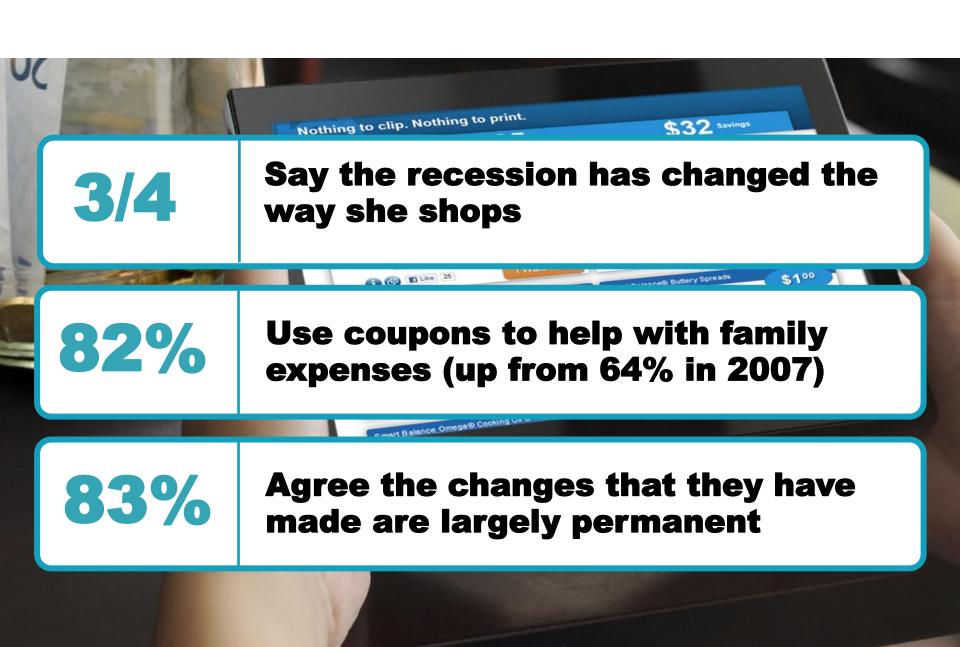
Execute programs that leverage each medium's ability to support moms' needs and behaviors



### **She shops for sport**

Mom has a passion for saving

### The coupon economy



### Moms are hooked on daily deals

60%

Subscribe to one or more service (e.g., Groupon, Living Social) with 9 avg number of deals/offers purchased this year

**Save 50%** 

36%

Share daily deals through social networks (124 index)

84%

Agree "When I save money on a shopping trip by using coupons, sales or other deals, I feel like I won!"

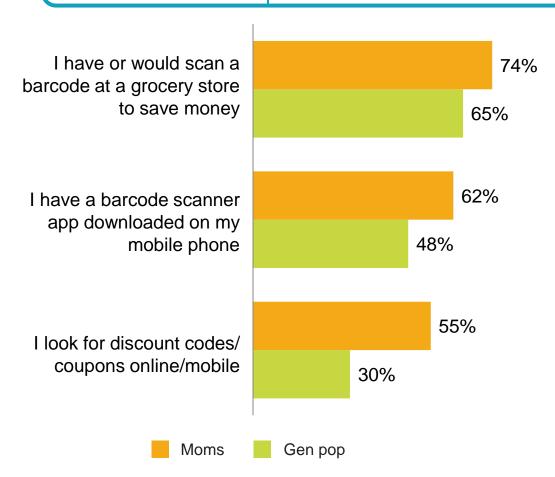


#### Mobile as deal maker





#### Percentage who agree with each statement



#### The Facts:

83% more likely to look for discounts on mobile

30% more likely to have a barcode scanner

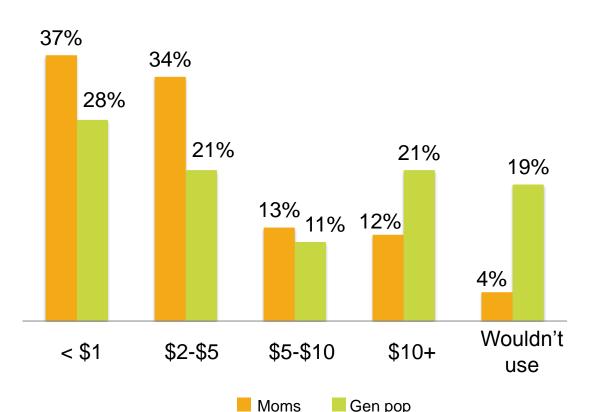
The Amazon app for iPhone is amazing. I can scan things at a store and see if they're less expensive from Amazon. I have saved a lot of money.

-BabyCenter Mom

## Moms will use bar codes for even low ticket items



How much money would you need to save before using your smartphone to scan a barcode to compare prices and/or check for discounts?



#### **The Facts:**

71% of moms will scan a barcode to save \$5 or less vs. 49% of gen pop





### **Shopping Mom Insight:** She shops for sport

nsight: Saving builds social currency

Moms seek discounts and deals before buying items big or small

**Action:** 

Lean into mom's desire for the deal

Give her offers at unexpected times, in new places; enable her to share with others; reward her efforts to create loyalty



### She reads the labels

Dr. Mom feels responsible for the wellness of her family



### **Eating healthy**

**52%** 

Prefer purchasing organic or natural alternatives (162 index)

**2X** 

More likely to be interested in or subscribe to Community Supported Agriculture (CSA)

We are enlisted military and only eat organic foods. We make sure to buy what is in season and do not buy any sort of processed foods. Our health is our top priority - so we make it work!

- BabyCenter Mom



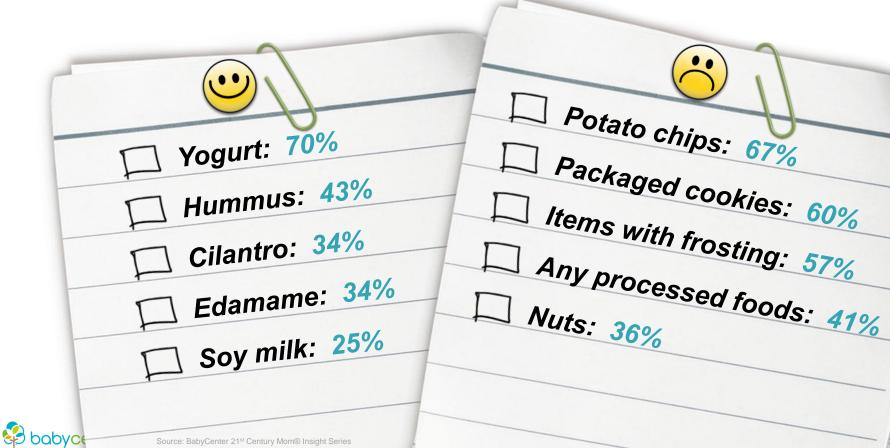
# Yogurt and hummus replace chips & cookies

Q:

Please check all the foods that you give your children that you didn't eat regularly as a child:



Which of the following would be met with disapproval if you brought them as "snack parent"?



### **Eco extends beyond pantry**

Moms are more likely to consider impact of purchases across categories

**2X** 

More likely to consider hybrid vehicles after becoming a mom

**2X** 

More likely to consider energy efficiency important for electronics after becoming a mom

1 in 3

**Look for low VOC paints** 



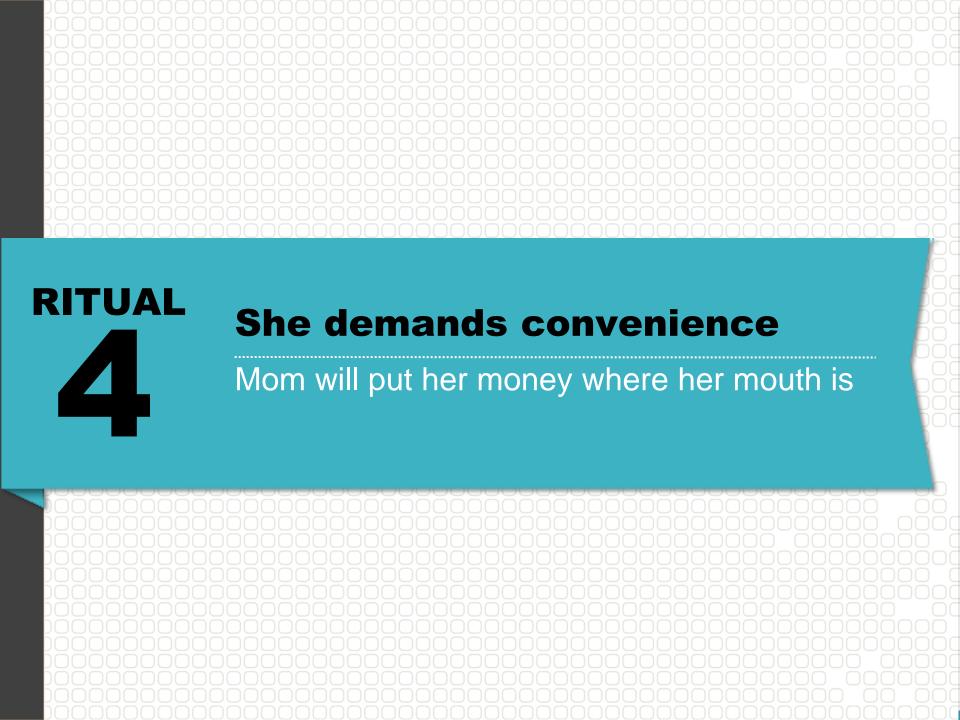
# **Shopping Mom Insight: She's reading the labels**

## Insight: Above all, safety and wellness are mom's top priority

She's willing to make trade-offs based on price, effort and availability; she won't skimp on safety; peer opinions matter

## Action: Make health and sustainability a part of your message

Detail Dr. Mom with info & ingredients; educate her on causes in support of children's health and safety



# Despite pressure to save, many moms don't skimp on convenience

30%

Agree they will pay more for products if it saves time and hassle

38%

Willing to pay for online shipping for convenience and time saving

35%

Agree simplicity, multi-use and convenience are the biggest priorities in the technologies moms buy

If we ever move, it had better be to someplace with good grocery delivery, because I'm not sure I can live without online ordering!

- BabyCenter Mom

### **Utility is her new luxury**

Moms say that cupholders are most 41% important to them when buying a new car (only 36% said resale value) Agree they are more willing to pay for time 36% saving and convenience on travel since having kids 80% Willing to pay more for "convenience packaging"



# **Shopping Mom Insight: She demands convenience**

## Insight: She rewards brands that simplify her life

Mom will pay more for convenience if it buys her time

## Action: Small things can make a huge difference

Demonstrate that you get her needs by focusing on convenience, ease of use and time saving



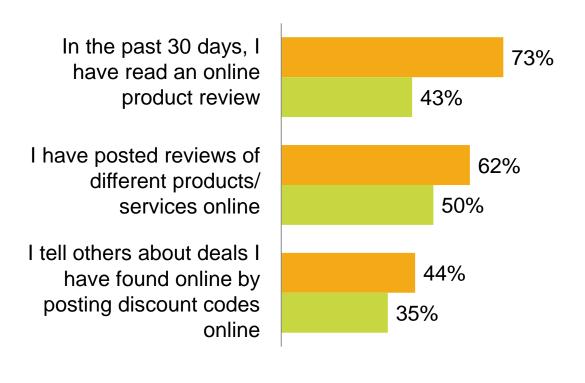
## She enlists new help

Moms are putting pixels, platforms and partners to work for her

# Online reviews and crowd-sourced discount codes make it easier



Percentage who have posted or read product reviews/discounts online:



Gen pop

### **The Facts:**

70% more likely to have read an online product review in last 30 days

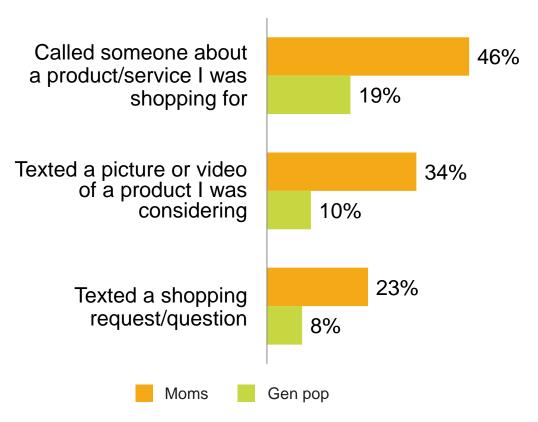


Moms

## Mobile makes it easier for you to shop with friends



What have you done using your mobile phone while out shopping?



### **The Facts:**

Moms are 3X more likely to text a picture of a product while shopping



### There's a new guy in line

Increasingly, dads play equal or primary role in purchasing across categories:



Who generally triggers or starts the shopping process?



### **Macro-Trend:**

Male unemployment is higher in dual working families for the first time ever

My DH actually does most of our grocery shopping. We sometimes go together, but usually he goes with our oldest son or takes both of them while I am at school.

-BabyCenter Mom

Source: U

Unemployment – Bureau of Labor Statistics





# **Shopping Mom Insight: She enlists new help**

## Insight: Mom is outsourcing and delegating parts of the purchase process

She is quick to embrace new services that enable her to get the job done faster and smarter

## Action: Develop tools allowing her to easily activate her network

She'll reward you with increased brand engagement and loyalty

### **RITUAL**



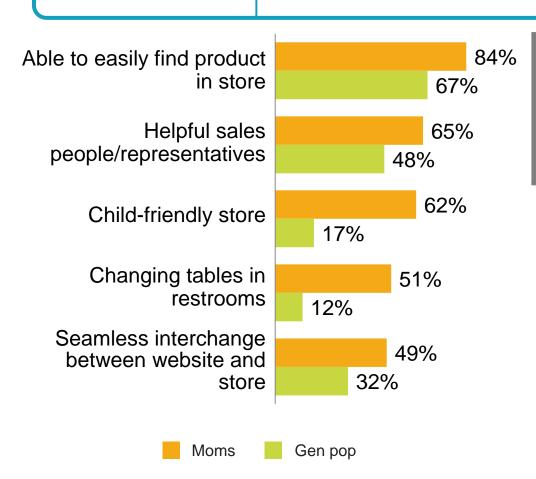
# **She expects more from retail**

Mom embraces stores that cater to her

# Moms demand a personal shopping experience



How important are the following when shopping?



### The Facts:

53% more likely to want seamless interchange between site and store

I was in Babies R Us and the price of the gate that I wanted to purchase was lower from the website than it was in-store. So I went on my phone and ordered the gate with the "ship-to-store" option, so that I could pick it up while I was at the store. Saved \$10.

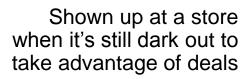
-BabyCenter Mom

## Moms respond to retail events

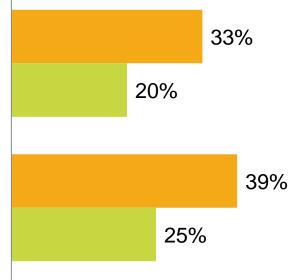




What have you done as part of Black Friday and/or Cyber Monday?



Planned shopping tips across multiple stores/sites to take advantage of the best sales



### **The Facts:**

50% more likely to shop in the dark





Gen pop





# **Shopping Mom Insight: She's expecting more from retail**

## Insight: Moms expectations of retailers are simple but not always obvious

Retailers that demonstrate an understanding of her needs create loyalty

## Action: Create an environment of hospitality and convenience

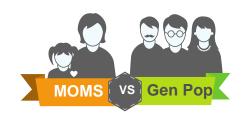
She'll reward you with more trips, more aisles, and bigger baskets

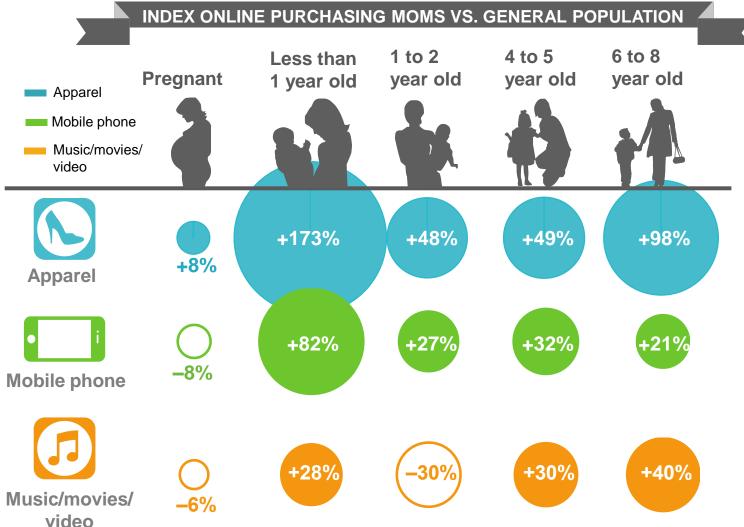


# **She puts the calendar** to work

Mom uses milestones to trigger purchases

### Milestones create peaks and valleys in moms' shopping



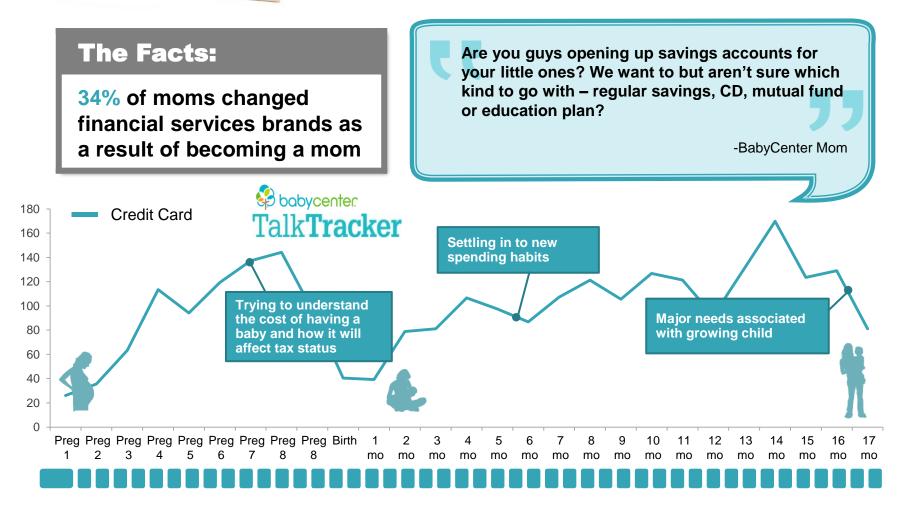








# Financial decisions triggered by milestones







# **Shopping Mom Insight: She puts milestones to work**

Insight: Purchase needs across categories are driven by the developmental stages of her family

Action: Ensure your messages resonate with mom

Tailor your marketing to her specific lifestage and needs

## What have these rituals taught us?

**Motherhood triggers change -** from how she spends her time and how she consumes media to how she shops.

Her influence and purchase power is growing across all categories – from Financial Services to Technology.

She's empowered and charting new paths to the register – innovating her own rituals with confidence.

Moms have become the leading indicator for the future of shopping. Watch them...



## Questions? We'd love to hear from you.

Email solutions@babycenter.com