

# 2011 Shopping Rituals

A **21<sup>ST</sup>CENTURYMUM™** Insights Series

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December 2011

Shopping **MUM**

# Methodology



## BabyCentre community:

- Social Listening in BabyCentre community
- Guided online discussions
- Analysis of conversations across Mums stages using our TalkTracker™ tool which measures trends in aggregate across specific product categories



## In-depth surveys:

- 21<sup>st</sup> Century Shopping Rituals Survey of mums vs. general online population
- 21st Century Mum® Shopping Rituals Series of mums specifically



theguardian



## Desk Research:

- Secondary research sources on market sizing and purchasing power of mums



# Agenda

**1**

**The transformation of motherhood**

**2**

**Her impact across categories**

**3**

**5 shopping rituals of The 21st Century Mum™**

**4**

**Marketing implications**

The background of the entire slide is a dense, overlapping pattern of butterflies. The butterflies have vibrant blue wings with intricate brown and black markings along the edges and veins. They are set against a dark blue background, creating a rich, textured visual field.

# **Transformation of motherhood**

# Motherhood creates new shopping rituals

**£210K**

**Average cost of raising a child**

She's not just buying for herself anymore

**68%**

**Change purchasing criteria when becoming a mum**

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

**4.3M**

**Mums online (spending an average of 37 hours online monthly)**

**700K**

**Births annually (43% to first time mums)**

**80%**

**Household shopping decisions made by mums**

**Sources:**

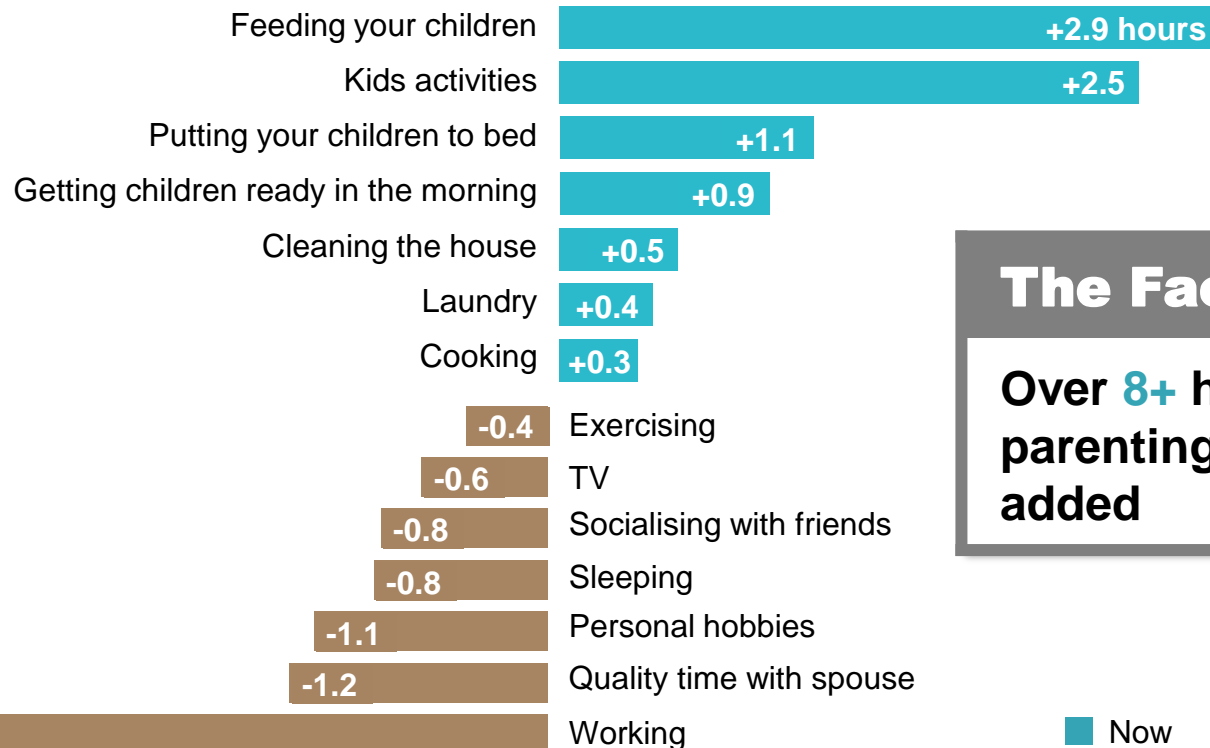
4.3 - Comscore PlanMetric, September 2011; UK Census; BabyCentre 21<sup>st</sup> Century Mum™ Insight Series

# Becoming a mum

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

Q:

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



## The Facts:

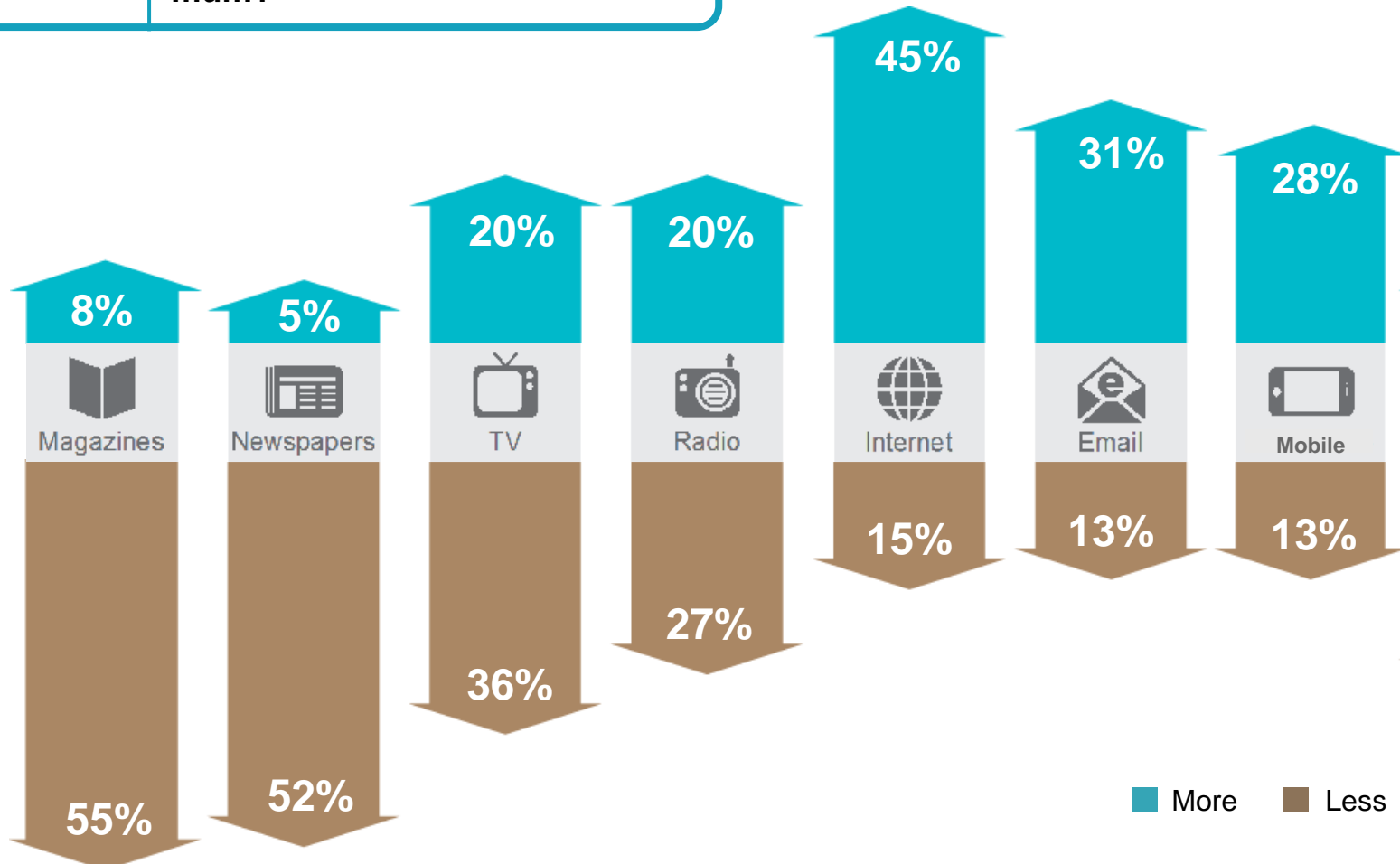
Over **8+** hours of parenting time added

■ Now ■ Then

# It changes the way she uses media

**Q:**

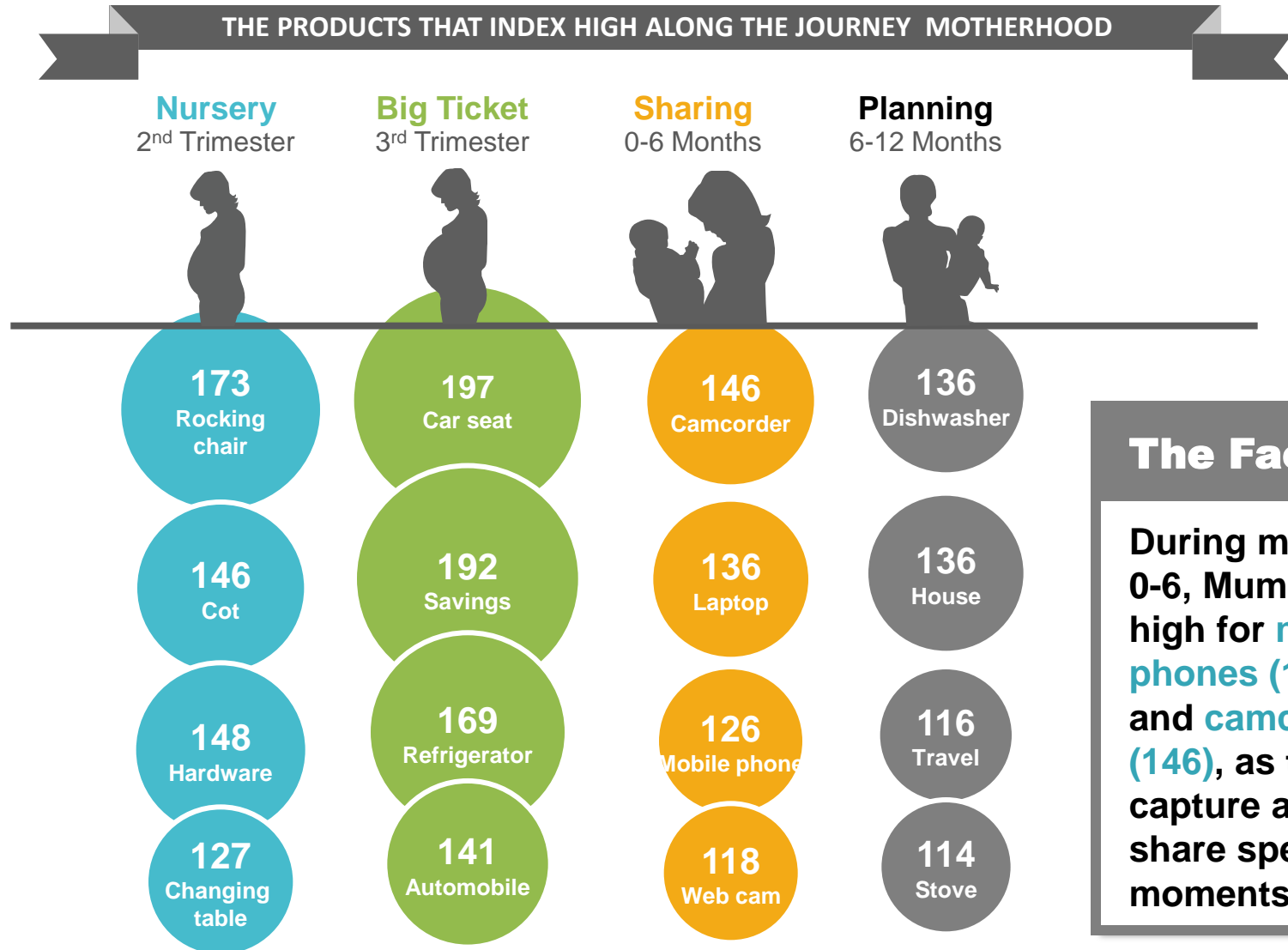
Which of these are you using more or less, since becoming a mum?



■ More ■ Less



# Having a baby triggers a series of purchases



## The Facts:

During months 0-6, Mums index high for **mobile phones (126)** and **camcorders (146)**, as they capture and share special moments

# Shopping mindset – faster, cheaper, smarter



**Q:**

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



**MUMS**

**VS**

**GENERAL  
POPULATION**

**◀ THEN**

FUN

ENERGETIC

RELAXED

**NOW ▶**

RUSHED

**+121%**

GUILTY

**+186%**

STRESSED

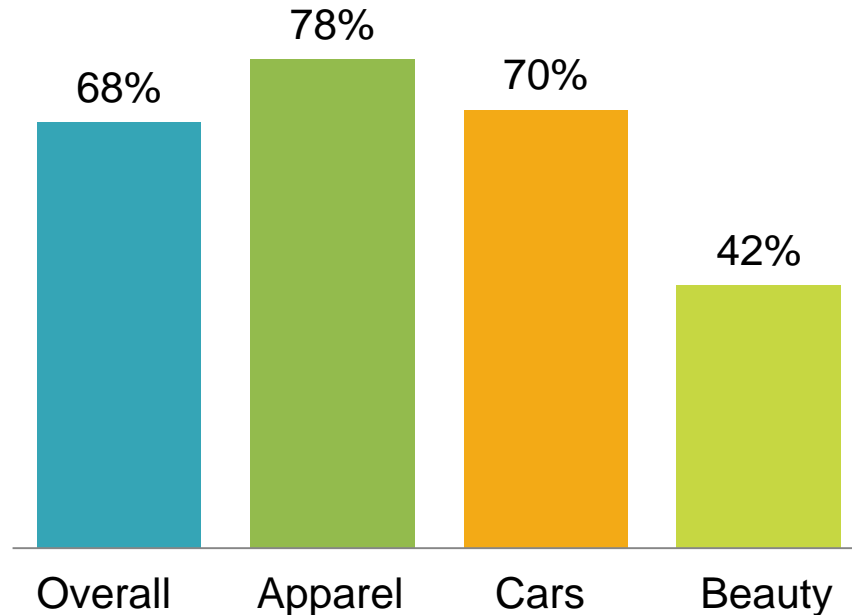
**+39%**

# Having a baby changes her purchase criteria for everything she buys

**Q:**

Have you changed your purchase criteria or the brands you buy since becoming a mum?

Did you change your purchase criteria?



## The Facts:

**67%** will buy a new car to accommodate her new family

**54%** changed or amended their personal care routine

CATEGORY SPOTLIGHT  
**Apparel**

# From design to comfort

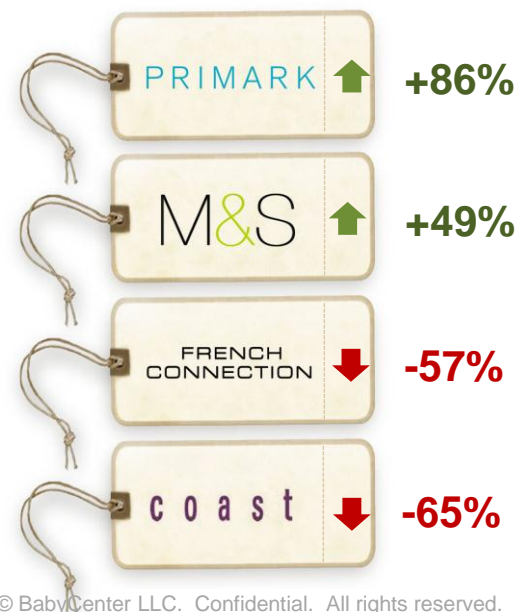
## Importance of each purchase criteria

THEN	NOW
78% Design /style	91% Comfortable Fit
77% Color options	89% Price
72% Reflects personality	84% On sale / discounts
62% Price	83% Durability
61% Sex appeal	79% Ease of cleaning
56% Head turning, trendy, hip	73% Versatility
53% Comfortable Fit	68% Color options
53% On sale / discounts	67% Design /style
52% Durability	61% Reflects personality
45% Versatility	37% Eco-friendly
41% Ease of cleaning	28% Sex appeal
26% Designer brands	22% Head turning, trendy, hip
24% Eco-friendly	12% Designer brands

“Having children has coincided with (caused?) a change in my physical self, and for the first time I have a fear of appearing as 'mutton dressed as a lamb'. I must consider carefully what to wear now.”

-BabyCentre Mum

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



CATEGORY SPOTLIGHT  
**Auto**

# From style to safety

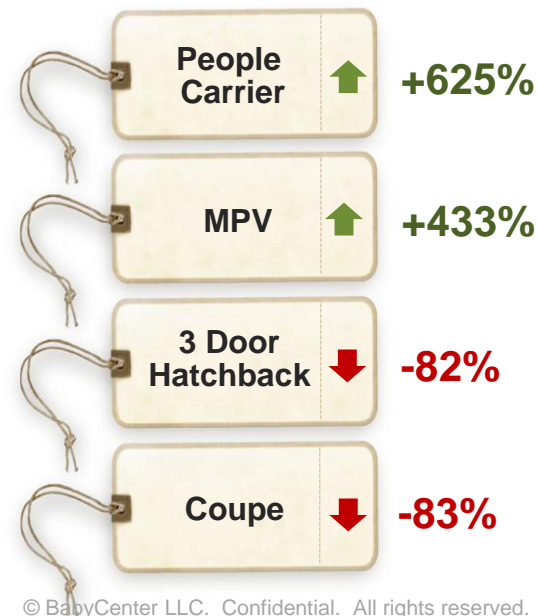
## Importance of each purchase criteria

THEN	NOW
87% Reliability & quality	96% Reliability & quality
78% Price	92% Safety Ratings
70% Design / style	86% Price
70% Performance	83% Seating, cargo
66% Safety Ratings	81% Fuel mileage
66% Fuel mileage	63% Performance
55% Interior options	54% Design / style
48% Brand of manufacturer	41% Brand of manufacturer
43% Reflects my personality	39% Interior options
36% Colour options	38% Family friendly options
32% Seating, cargo	24% Colour options
25% Rich Features	22% Reflects my personality
24% Luxury car brand	14% Rich Features
13% Family friendly options	12% Luxury car brand

“ I now need a 5 door car which can fit a child seat in the back and a good sized boot to fit a buggy and shopping. ”

-BabyCentre Mum

Compared to before, which automotive types best fit mum's lifestyle and reflect her personal identity?



CATEGORY SPOTLIGHT  
**Personal Care**

# From self-expression to low maintenance

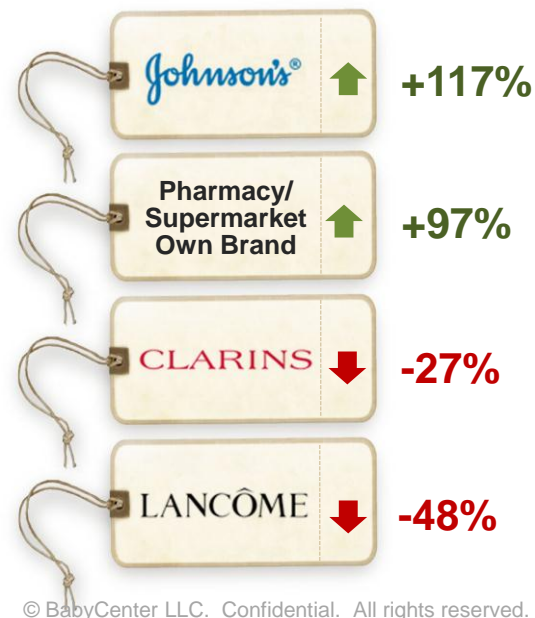
## Importance of each purchase criteria

THEN	NOW
69% Performance	78% Moisturising
64% Moisturising	76% Price
57% Smell	74% Special offer
56% Sun protection	73% Sun protection
51% Brand	71% Performance
51% Price	51% Smell
50% Special offer	43% Best for coverage
39% Best for coverage	39% Brand
26% Environmental credentials	37% Anti-aging
25% Toning	37% Environmental credentials
22% Anti ageing	33% Toning

“ I use tinted moisturiser now & not foundation. It's funny as I used to wear it all the time..... ”

-BabyCentre Mum

Compared to before, which brands do mums feel reflects their personal care and beauty routine?







**family**PRO

**Lisa Hellinger**

CEO, CFO, CTO, CMO, Manager, Chef,  
Chauffeur, Nutritionist, Networker, Professor,  
Jack of all Trades

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**Spending to  
support new  
roles**

# Mum is a shopping super-hero

## Meet her sidekicks



**More than 50% of Mums have a smartphone**



**94% of Mums use social media**



**48% say their time online is the most peaceful time of their day**

# Motherhood is a trigger for mobile adoption

## Most important smartphone features

BEFORE		AFTER	
1	Text messaging	1	<b>Camera</b> <b>+96</b>
2	Voice calling	2	<b>Video camera</b> <b>+222</b>
3	Clock / alarm	3	Calendar
4	Contacts / address book	4	Notes/lists
5	Internet browser	5	Apps
6	Music player (iPod app)	6	Internet browsing
7	Email	7	Voice calling
8	Calendar	8	Clock / alarm
9	Apps	9	Text messaging
10	GPS	10	Contacts / address book



## The Facts:

**36%** purchased a smartphone as a result of become a mum

**Nearly all Mums with smartphones have used them to shop or research products vs. two-thirds of the gen pop**

# Mobile is literally her helping hand

Complements the rhythm of motherhood

**47%**

**Let their children play with their mobile phone**

**22%**

**Nearly a quarter of the apps on her phone are for her children**

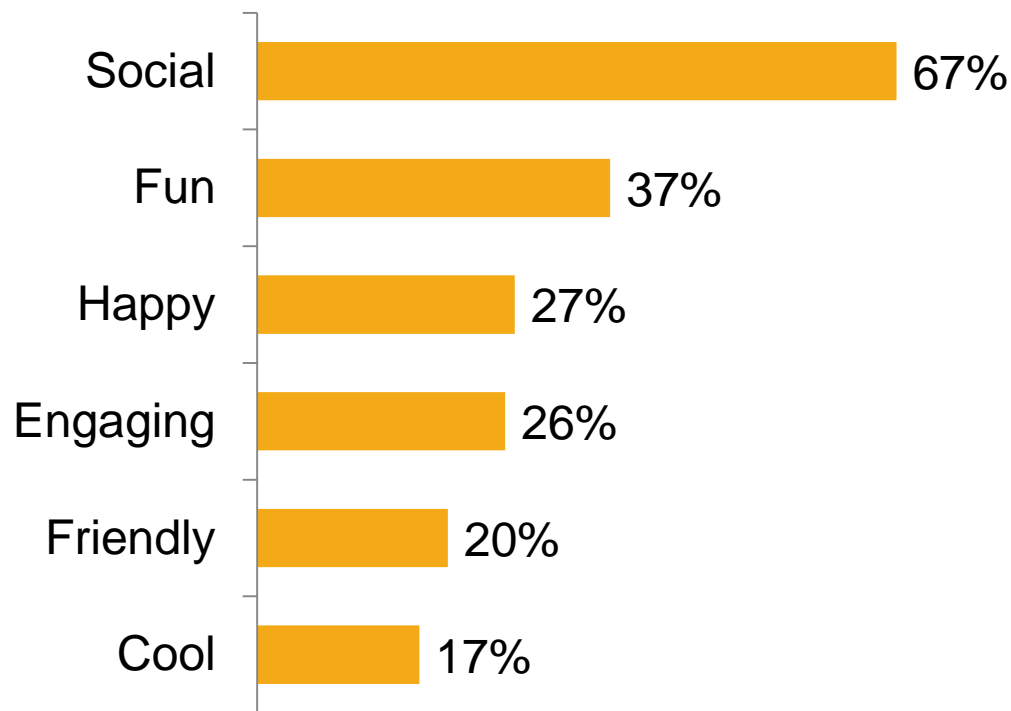
**59%**

**Say it's their do-everything device – both fun AND efficient**

# Mums feel more connected and social with their mobile device

**Q:**

Which of these words describes the way you feel about your smartphone?



## The Facts:

**46%** said they **LOVE** their smartphone

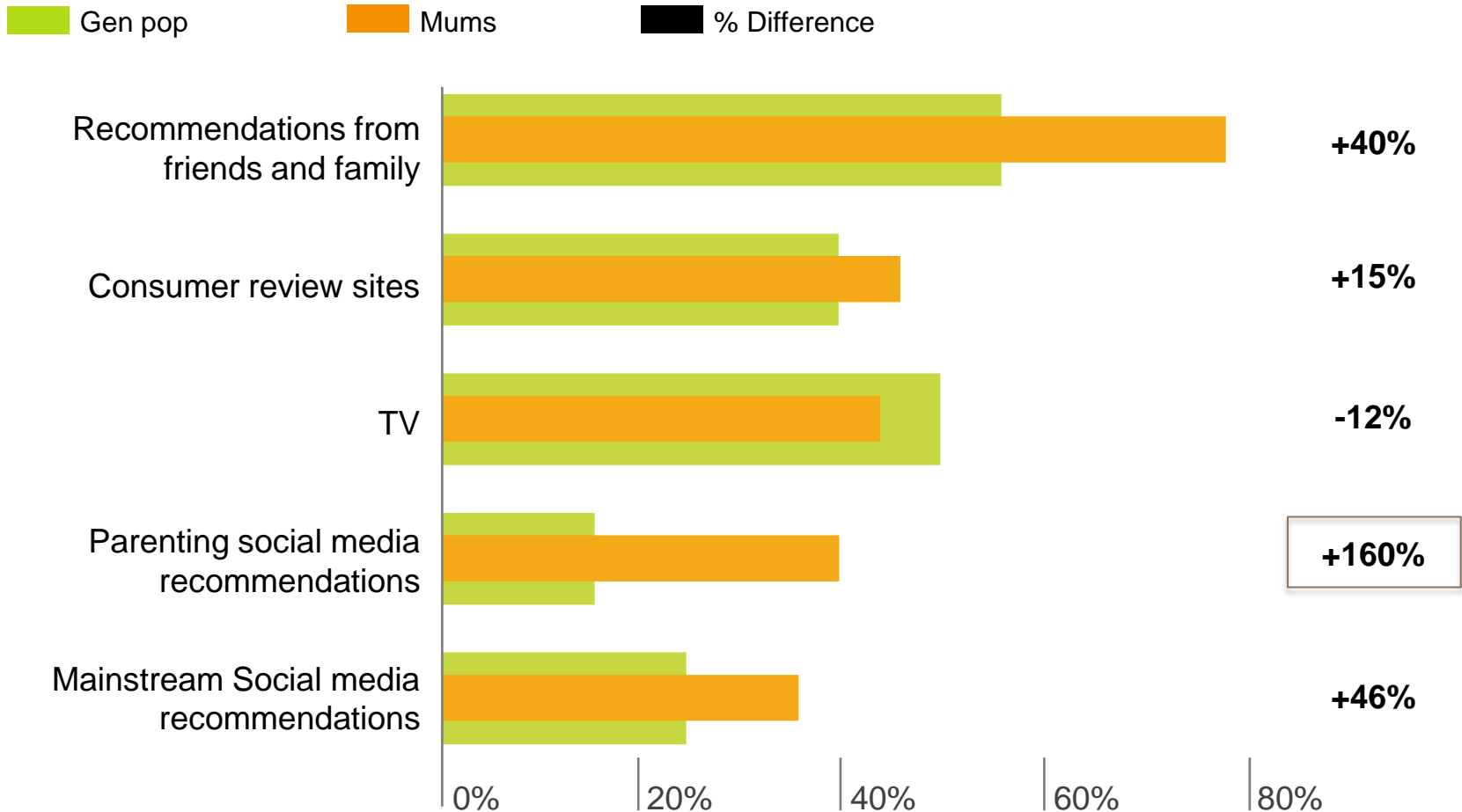
**1 in 5** are “addicted”

# Social and online are her key shopping tools



Q:

When researching purchases, which do you generally use?







# **The 2011 Shopping Rituals of The 21<sup>st</sup> Century Mum™**

**RITUAL**

**1**

**She shops around**

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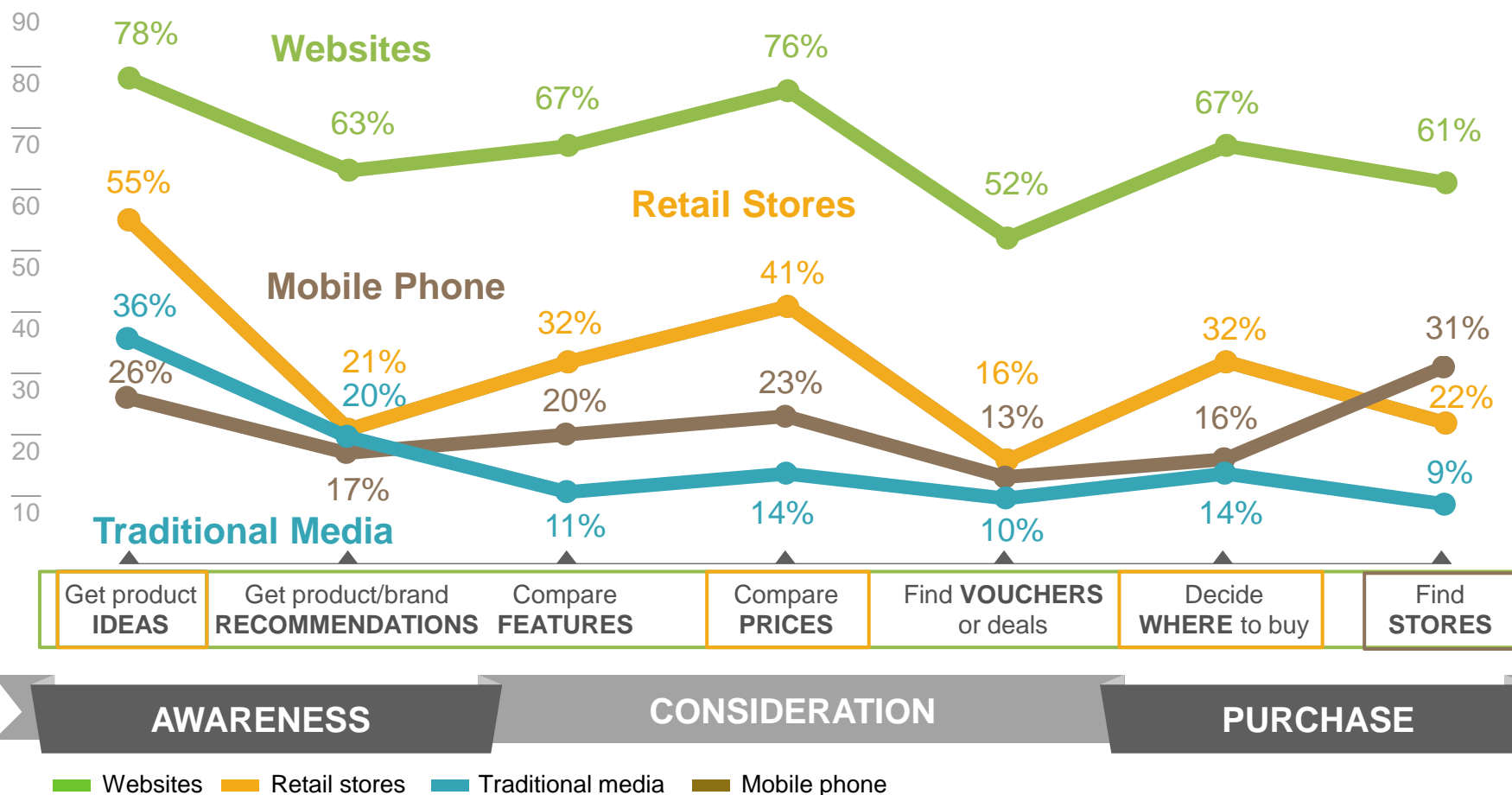
Mum knows options are only a click away

# Social and mobile are her key tools



Q:

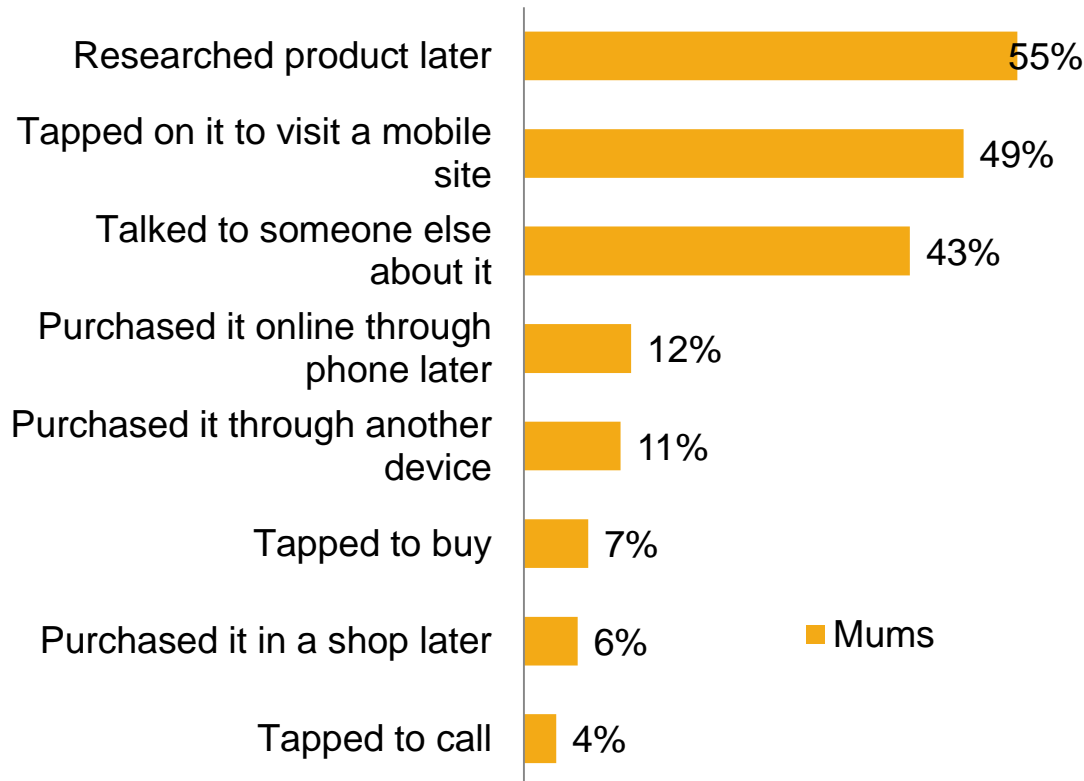
How did you use or do you plan to use each of the following resources throughout the shopping process?



# Mums respond well to mobile messages

Q:

Which action did you take after seeing an ad on your mobile device? (of those who took an action)



## The Facts:

**38%** of mums have taken an action after seeing an ad on their smartphone

# Shopping online is mainstream

**88%**

**Shopped online past 30 days**

**87%**

**Made an online purchase past 30 days**

**62%**

**Would do *all* shopping online**

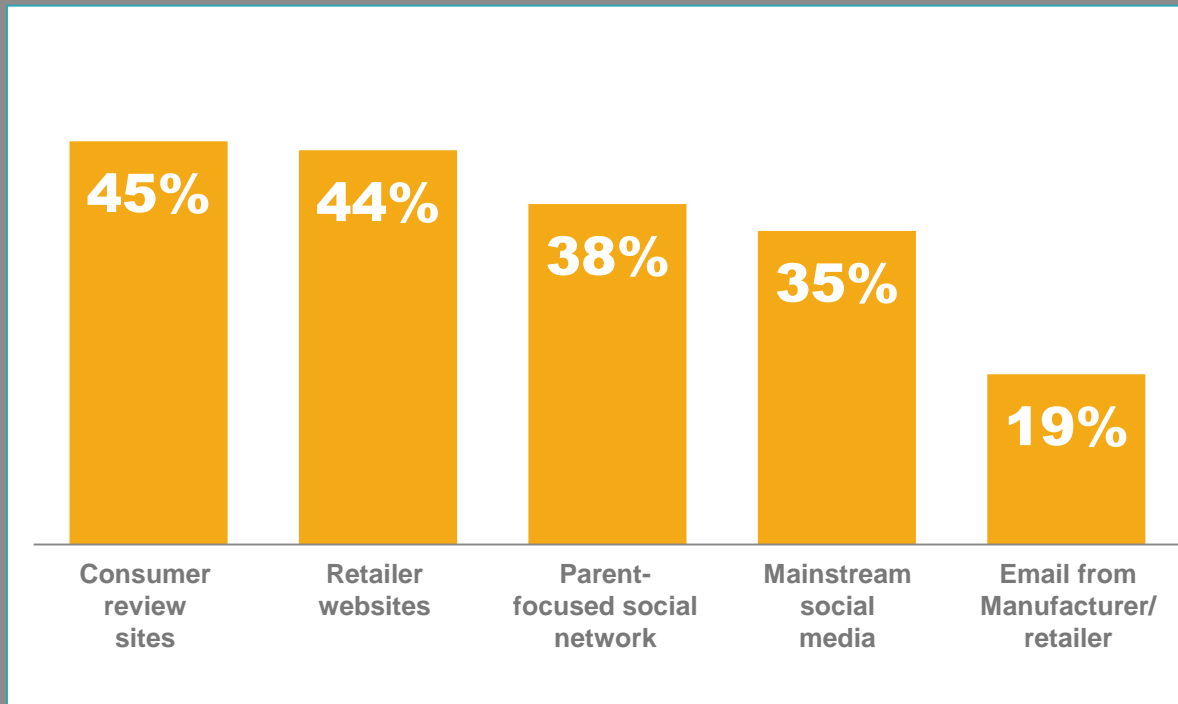
“ Since my LO has arrived I have started to do all my shopping online. It's brilliant! It really removes a lot of stress and I can get what we need delivered right to my door. I highly recommend it to all new mummies out there! ”

- BabyCentre Mum

# Web and social are her recommendation engines

**Q:**

When researching products/services to buy, which of these sources do you generally use?



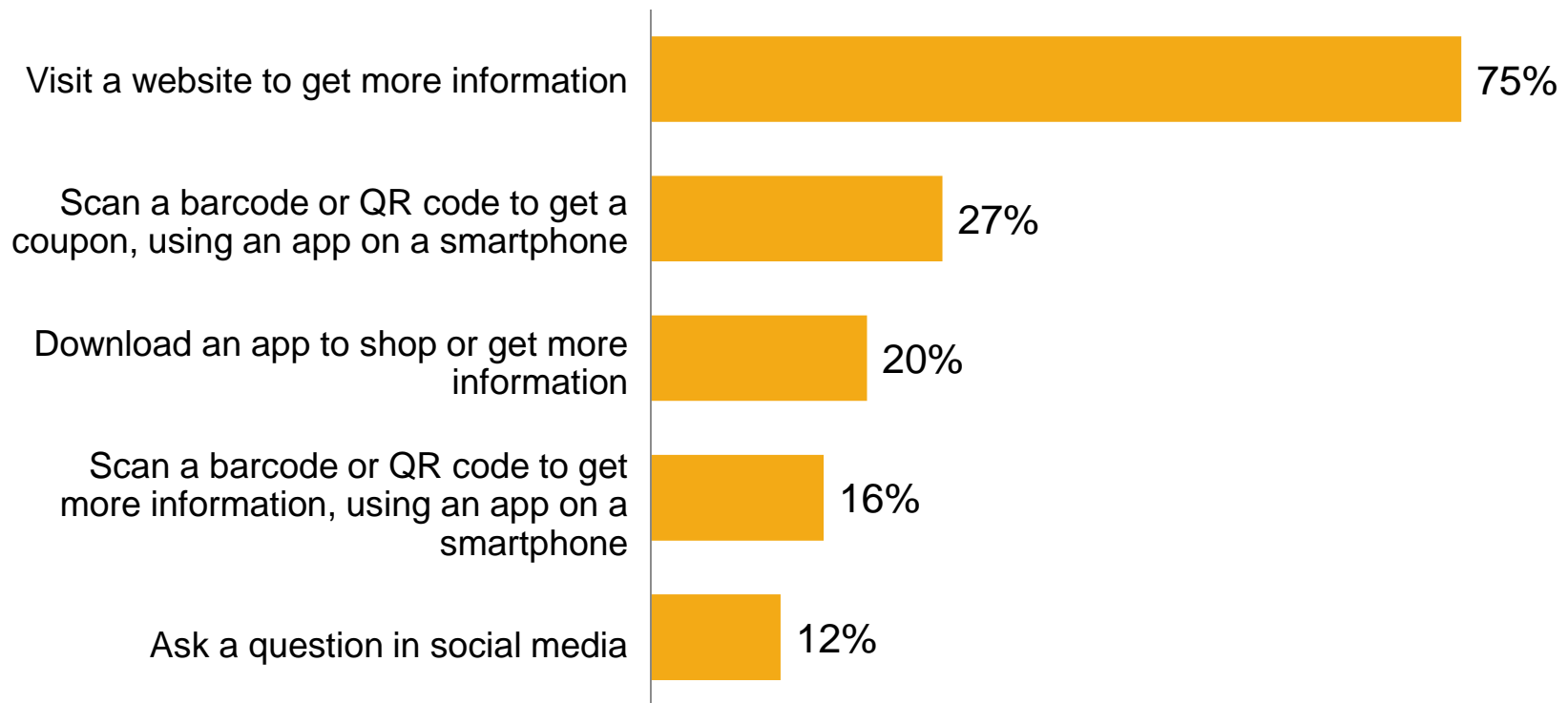


CATEGORY SPOTLIGHT  
**FMCG**

# Mums shop in a wide variety of places

**Q:**

**Regarding your purchases of low ticket items, such as grocery or personal care, is it worth your time to:**





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

**Insight:** **Mum'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 mums' needs and behaviours

# RITUAL 2

## **She shops for sport**

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Mum has a passion for saving

# The voucher economy

**77%**

**Are more interested in deals**

**44%**

**Regularly print vouchers**

**87%**

**Agree that using vouchers is more acceptable**

“Does anyone have any Mothercare codes please? I need to buy a buggy and the discount would really help...”

- BabyCentre Mum

# Mums are hooked on daily deals

**90%**

**Subscribe to a daily deal or discount service**

**35%**

**Access deal sites monthly on their phone (159 index)**

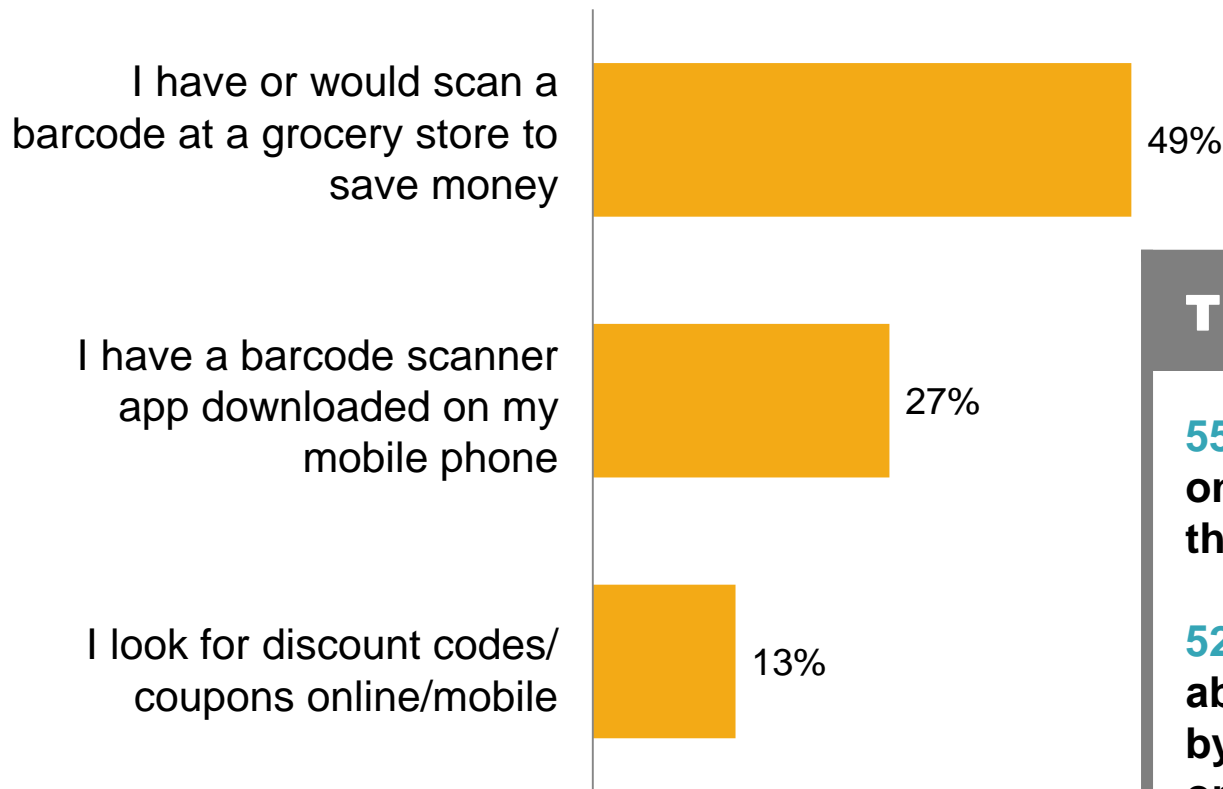
**36%**

**Agree “I feel like I won!” when they get a great daily deal**

# Mobile and online as deal makers

Q:

Percentage who agree with each statement



## The Facts:

**55%** look for discount codes online. **26%** do so every time they make a purchase;

**52%** of mums tell others about deals they've found by posting discount codes online



# Mums will scan a barcode for even low ticket items

**Q:**

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:

**53%** of mums will scan a barcode to save £5 or less



# Shopping Mum Insight: She shops for sport

## **Insight:** **Saving builds social currency**

Mums seek discounts and deals before buying items big or small

## **Action:** **Lean into mum'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

# RITUAL

# 3

## **She reads the labels**

Dr. Mum feels responsible for the wellness of her family

CATEGORY SPOTLIGHT

**FMCG**

## Eating healthy

**47%**

**Read the labels on almost everything they buy**

**24%**

**Try to buy only organic**

“

I'm starting my LO on solids this week and want to start him on organic fruits and veggies. Especially for the purees and definitely porridge.

”

- BabyCentre Mum

# Eco extends beyond pantry

Mums are more likely to consider impact of purchases across categories

**20%**

**Say they are more likely to consider hybrid vehicles after becoming a mum**

**36%**

**Are more likely to agree that energy efficiency important for electronics after becoming a mum**

**1 in 2**

**Look for low VOC paints**





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

**Insight:** **Above all, safety and wellness are mum'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. Mum with info & ingredients; educate her on causes in support of children's health and safety

# RITUAL 4

**She demands convenience**

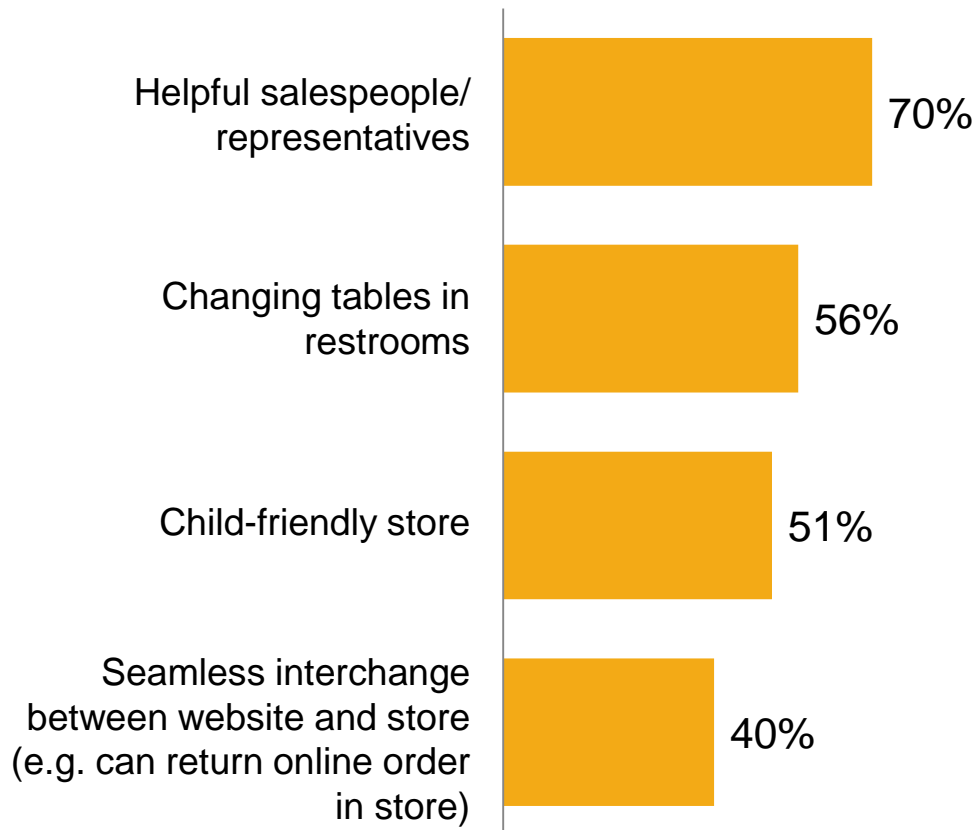
Mum will put her money where her mouth is



# Mums demand a personal shopping experience

**Q:**

How important are the following when shopping?



**“I went to a store on Oxford Street and they said I needed to put my name on a waiting list for a pram. Like I was at a night club or restaurant. I was a bit put off by it. Can anyone suggest some reputable retailers to get luxury prams such as the Cameleon or the Stokke Xplory?”**  
-BabyCentre Mum

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

**48%**

**Agree they will pay more for products if it saves time and hassle (vs. 37% gen pop)**

**58%**

**Willing to pay for online shipping for convenience and time saving**

**34%**

**Are interested in subscribing to services that automatically ship basic household items each month**



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

**Insight:** **She rewards retailers and brands that simplify her life**

Mum will pay more for convenience if it buys her time

**Action:** **Create an environment of hospitality and convenience**

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

# RITUAL 5

## **She enlists new help**

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

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

**Q:**

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



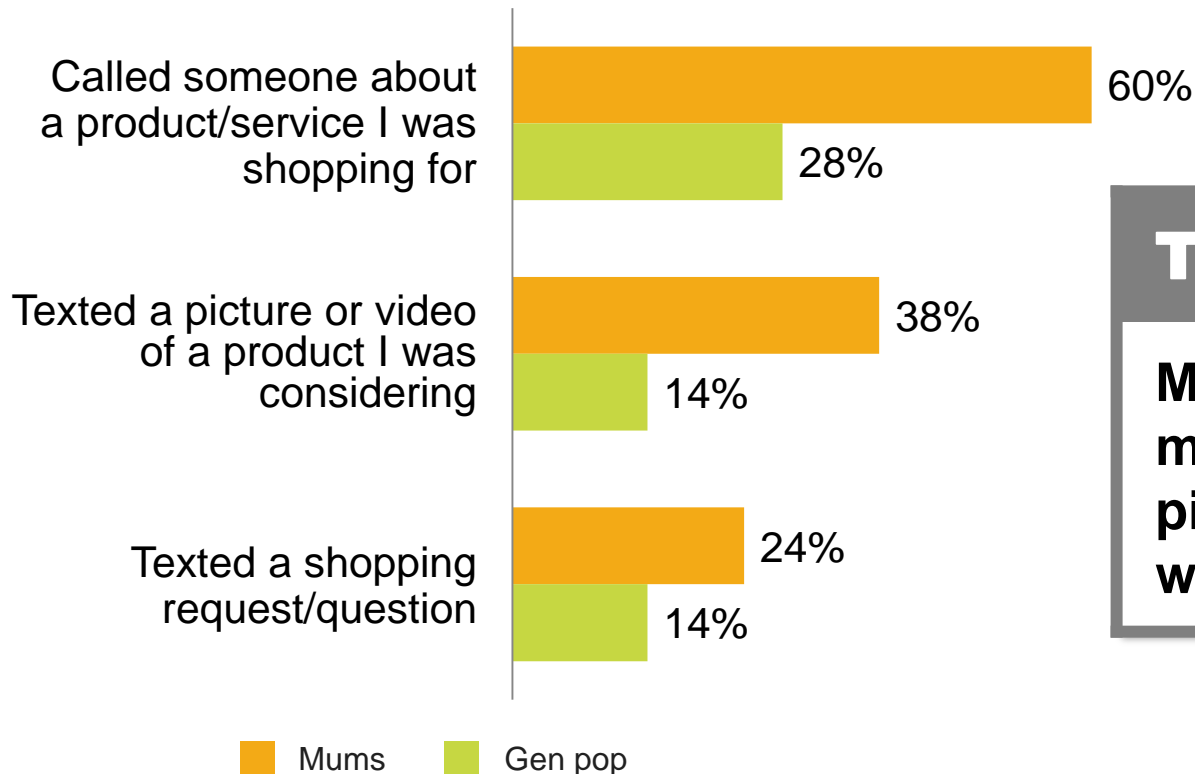
**“ My BabyCentre time (while the kids are sleeping) is time for me to interact with grown ups! ”**

**-BabyCentre Mum**

# Mobile makes it easier for you to shop with friends



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



## The Facts:

Mums are almost **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:

**Q:**

Who generally triggers or starts the shopping process?

## Groceries



30%  
spouse or  
shared

## Apparel



26%  
spouse or  
shared

## Personal care



“Thank goodness my DH will dash off to the market when he sees the pantry is low. He also makes sure our oldest son has shoes that fit! He grows so fast, I lose track.”

-BabyCentre Mum





# **Shopping Mum Insight:** **She enlists new support**

**Insight:** **Mum 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 1** Mum shops around

**RITUAL 2** Mum shops for sport

**RITUAL 3** Mum reads the labels

**RITUAL 4** Mum demands convenience

**RITUAL 5** Mum enlists new support

Shopping  
**M****M**

# **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 and Technology to Motoring and Beauty.

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

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



**Questions?  
Please contact us.**

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