



2012 American Media Mom

A **21STCENTURYMOM[®]** Insights Series

April 2012

MediaM[□]M

Methodology



In-Home Research

- 35 new & expectant moms participated
- Chicago & SF Bay Area
- Media journal for 3 days, followed by in-home friendship group with 2 to 3 friends



**2,500
Respondents**

In-depth surveys

- 21st Century Media Mom Survey of moms vs. general online population
- 1,100+ expectant women or moms with kids up to 7 years old
- 1,400+ other online adults



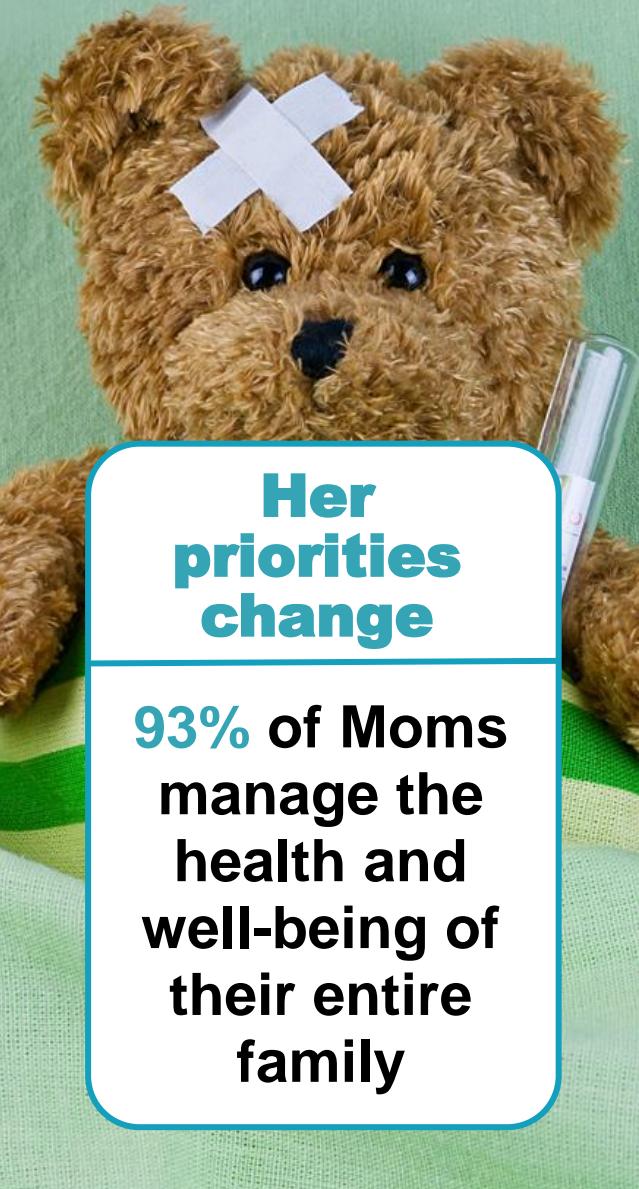
Behavioral & Secondary

- Nielsen three-screen media analysis
 - Television
 - Online
 - Mobile
- BabyCenter Moms compared to adults 18+



Transformation of motherhood

Everything changes for Mom



Her priorities change

93% of Moms manage the health and well-being of their entire family



Her brand preferences change

Design is now the **6th** most important criteria for apparel – it used to be **1st**



Her social circles change

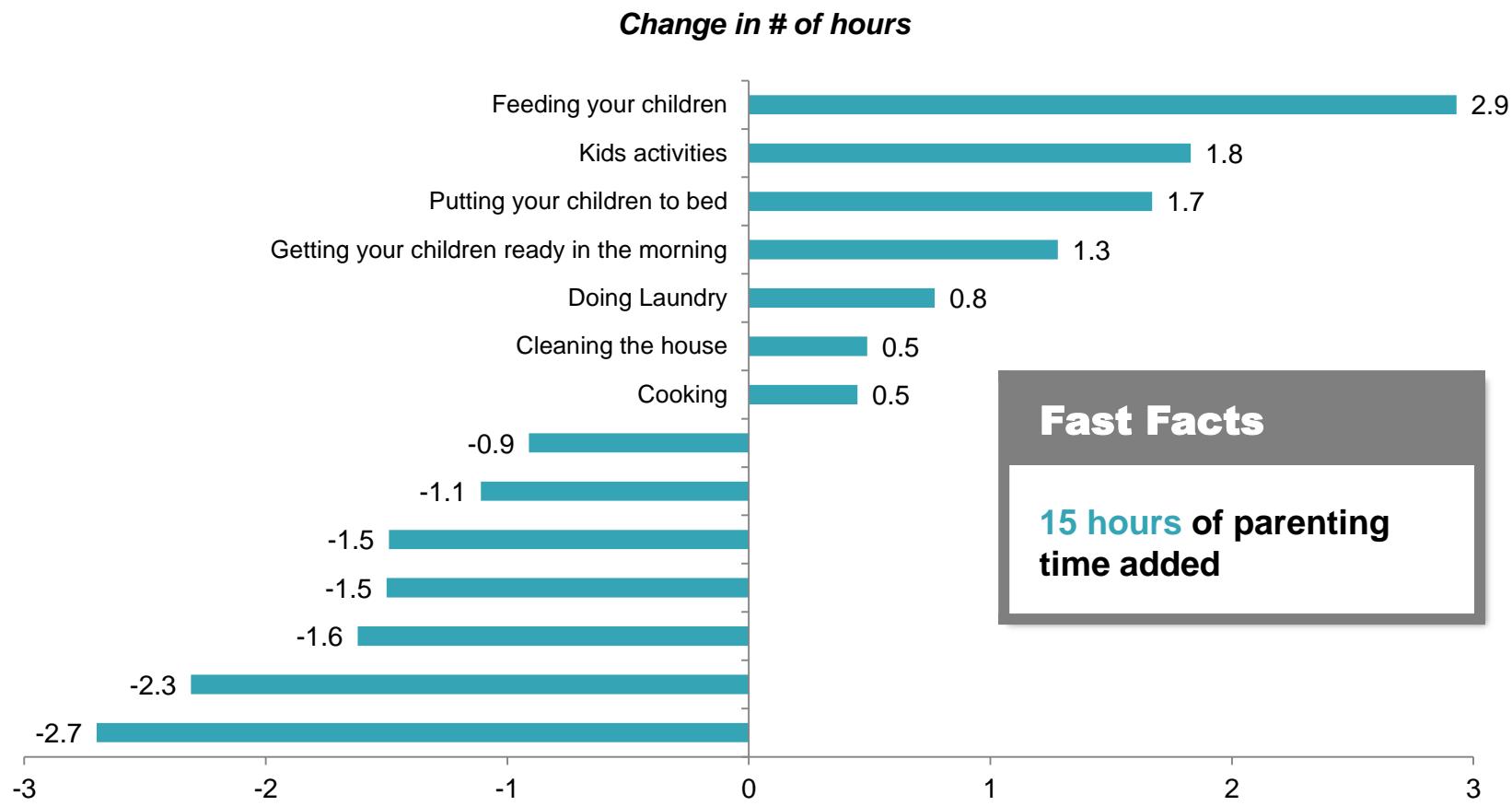
58% have less in common with their non-mom friends

She spends her time differently



Q:

Before & after becoming a mom, how many hours in an average weekday do you currently spend doing each of the following activities?

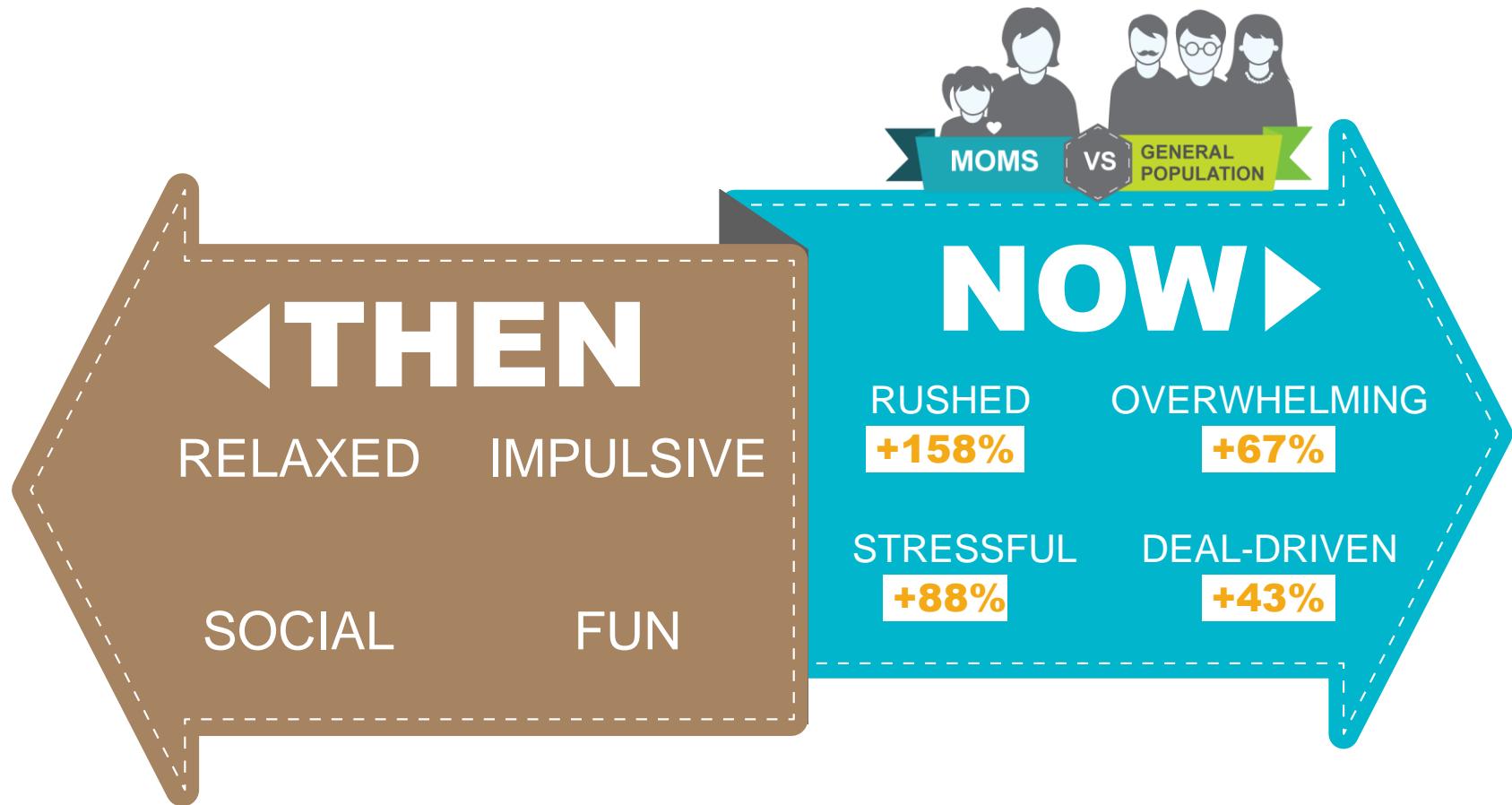


It's a dramatic change in mindset



Q:

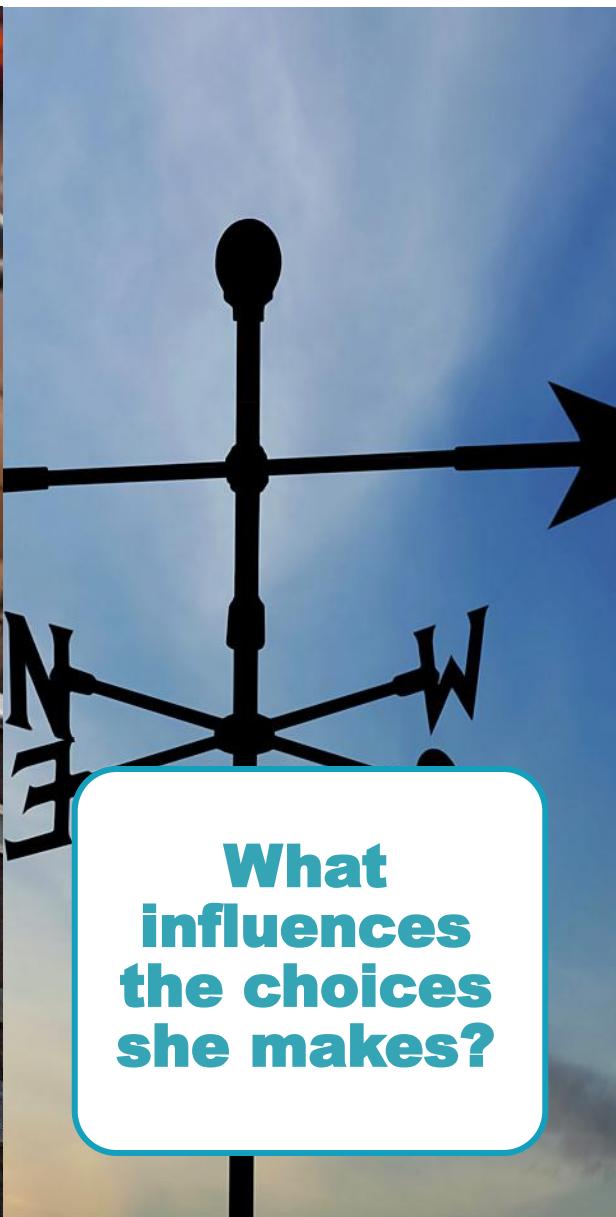
Which of these words describes the way you feel when shopping?



Understanding the American Media Mom



**What tools
is she using
to empower
her new
life?**



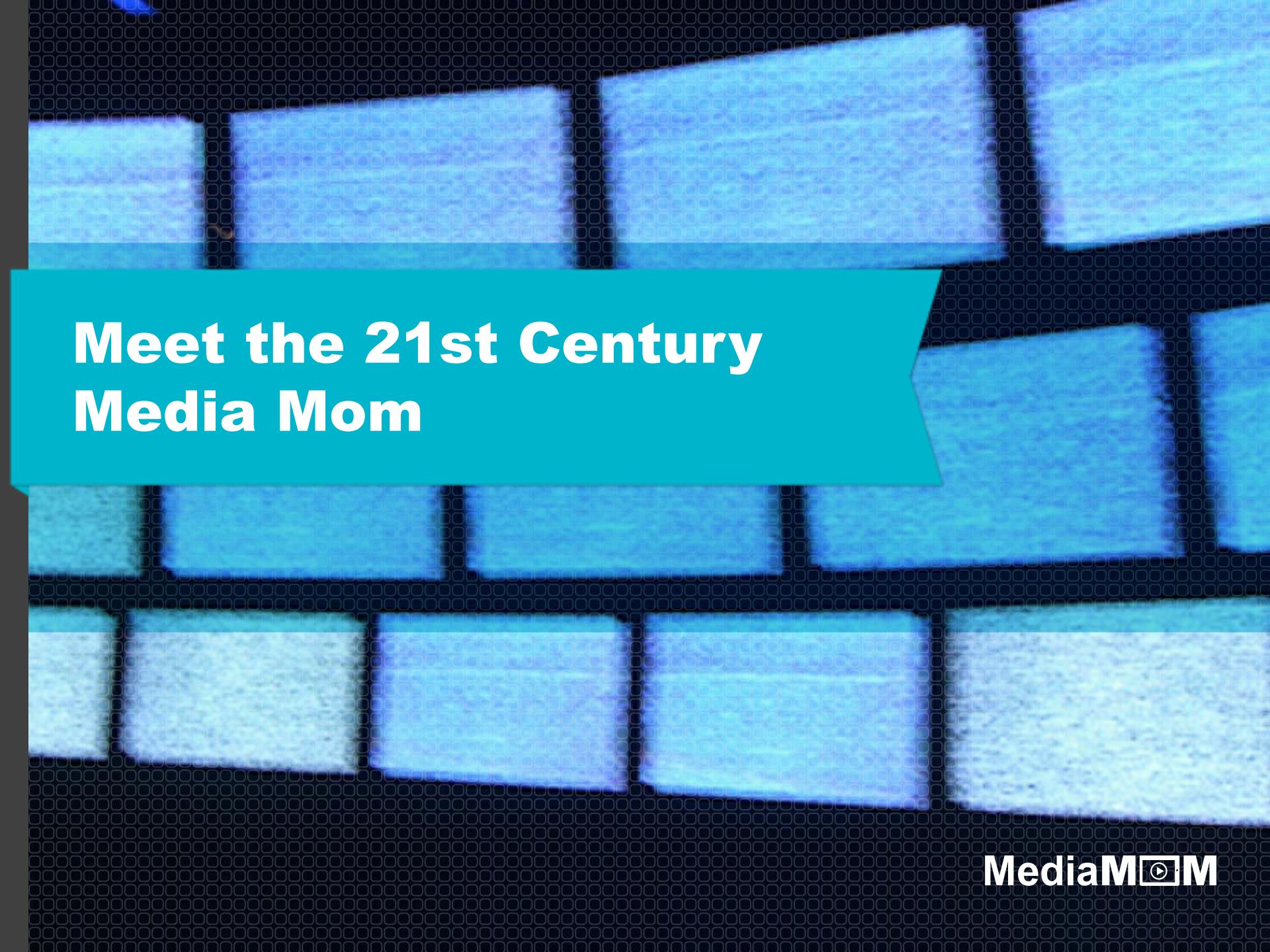
**What
influences
the choices
she makes?**



**What
captures
her
attention?**

Agenda

- 1 Meet the 21st Century Media Mom**
- 2 Digital is Essential in Her Life**
- 3 Media Mom is in Control**
- 4 Her Path to the Register has Evolved**
- 5 Media Mom is Changing the Rules for Marketers**



Meet the 21st Century Media Mom

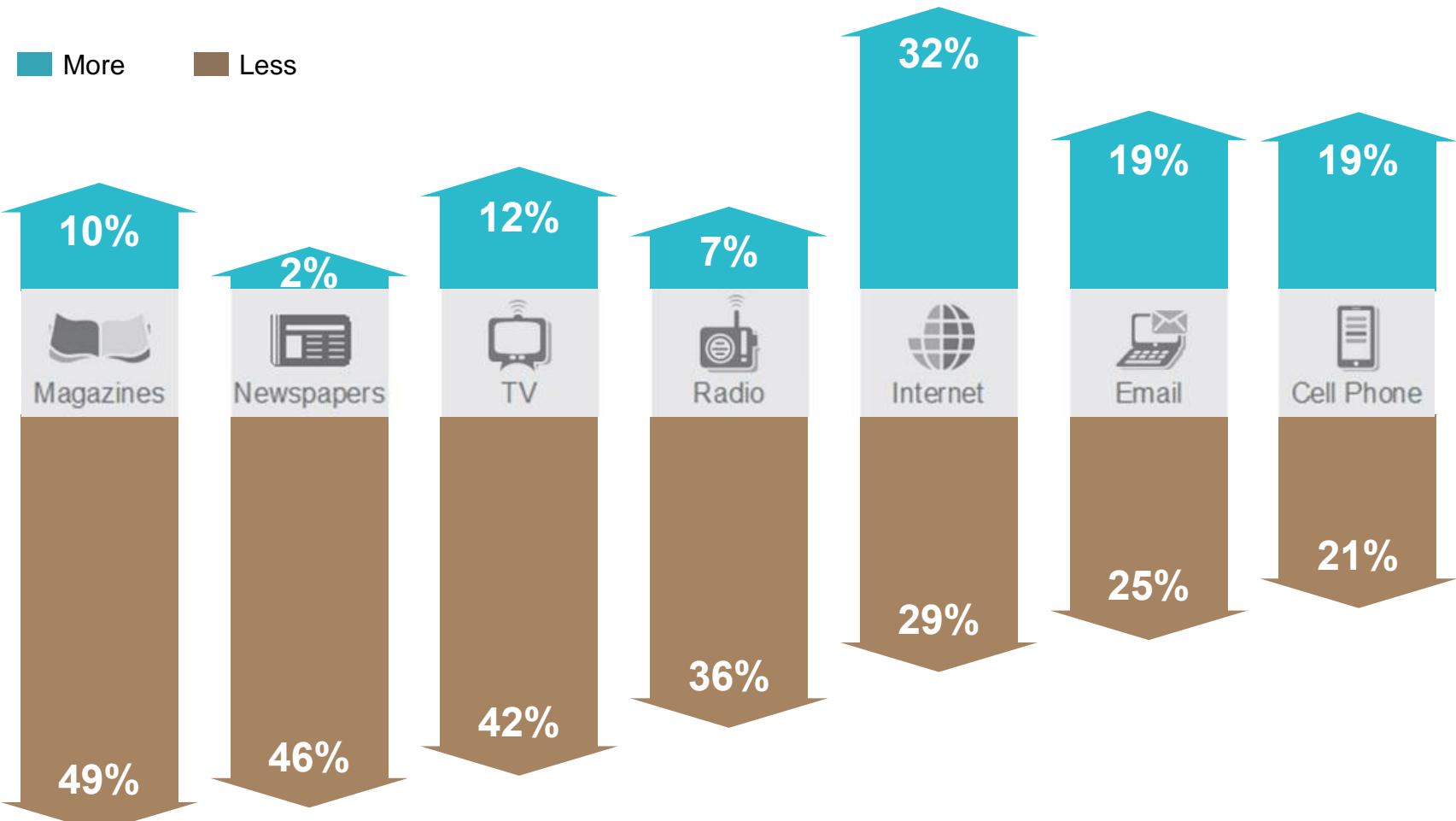
MediaM[□]M

Motherhood impacts media usage



Q:

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



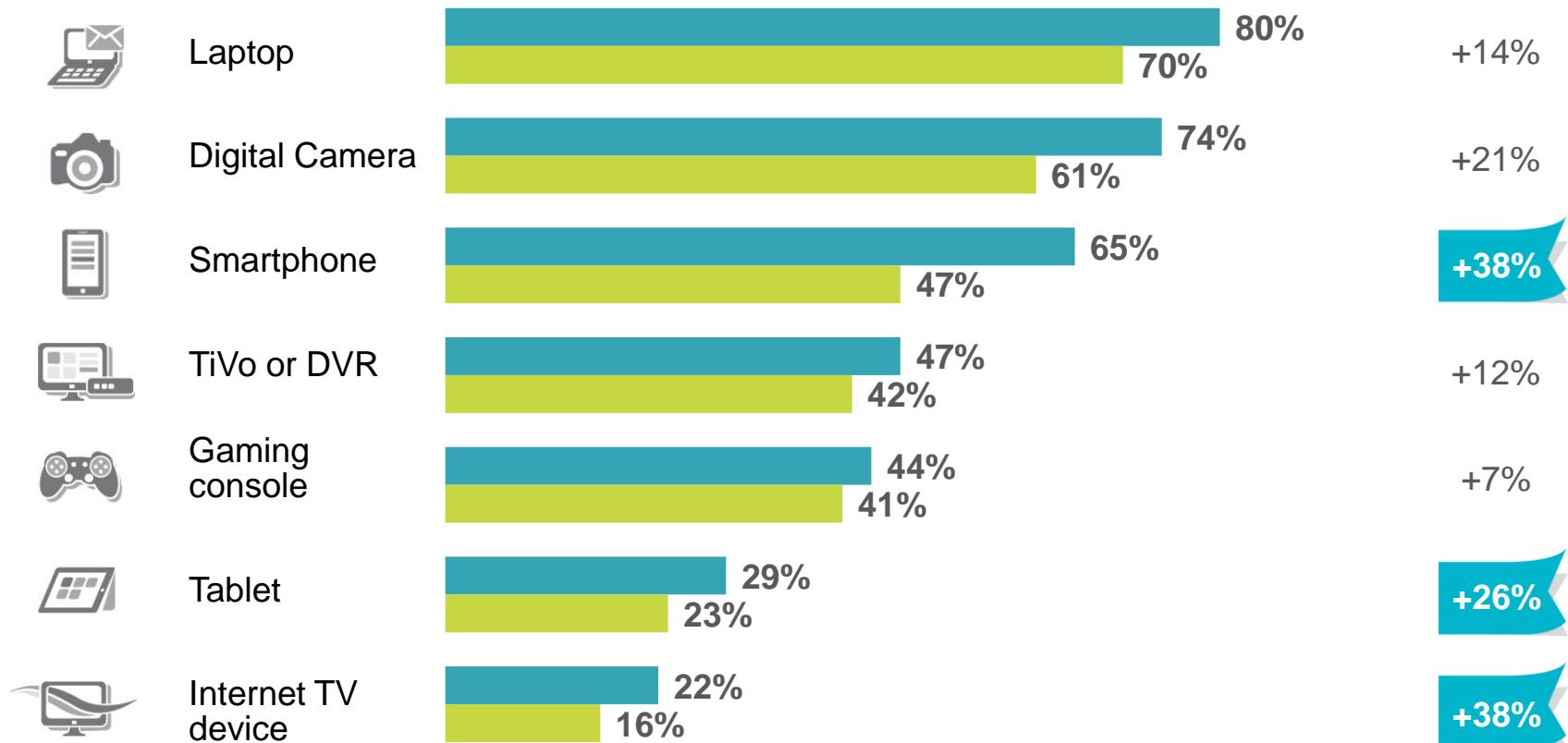
Mom is an early adopter of devices



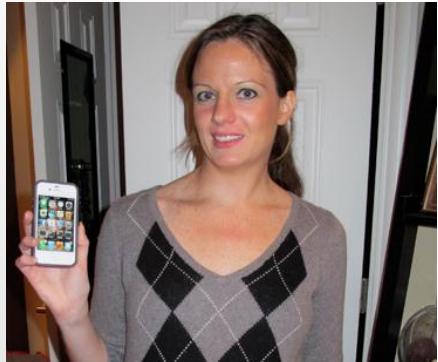
Q:

Which of the following devices do you personally own or use on a monthly basis?

Moms Gen. Pop.



Meet the Family Media Managers



The Technophile

Kristy

Eagerly awaiting
the next i-Device



The Cable Rejector

Lora

Unplugged but
always on



The Mobile Master

Mary

On the move,
but always
connected

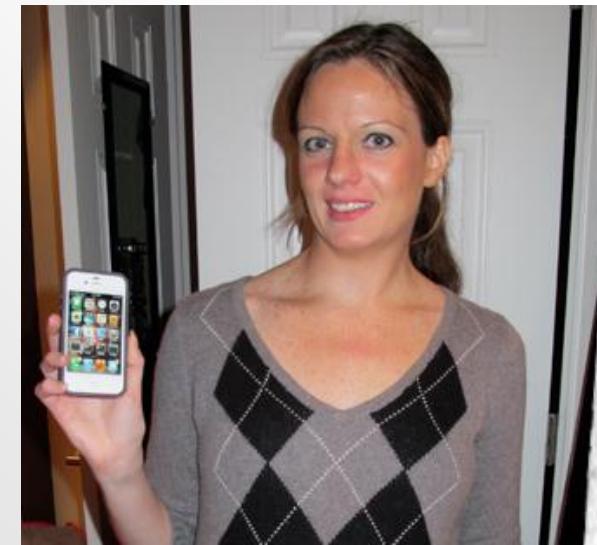


The “Social”-ite

Sarah

Lives life in
140 characters
or less

Kristy – The Technophile



PROFILE

Age 34
San Francisco
2 year old daughter and expecting
SAHM
Owns Mac, iPhone, iPad
Has cable with DVR

MEDIA HABITS

- Sleeps with iPhone next to bed
- Pinterest addict
- Watches TV recorded on DVR

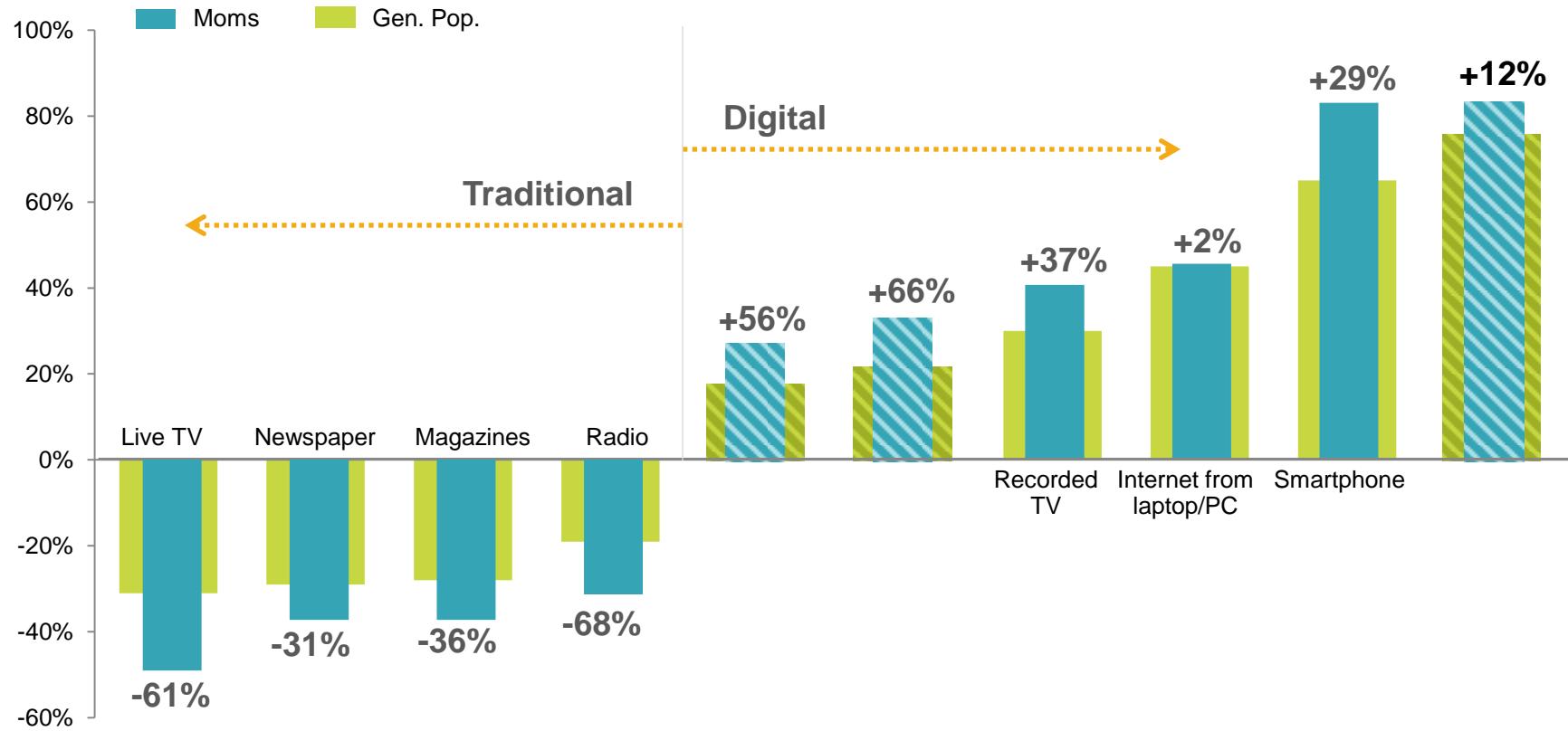
“ Got email about sales on kids stuff at Gap + free shipping – I flag to look at later – I love free shipping. ”

Mom's media behaviors are disrupted



Q:

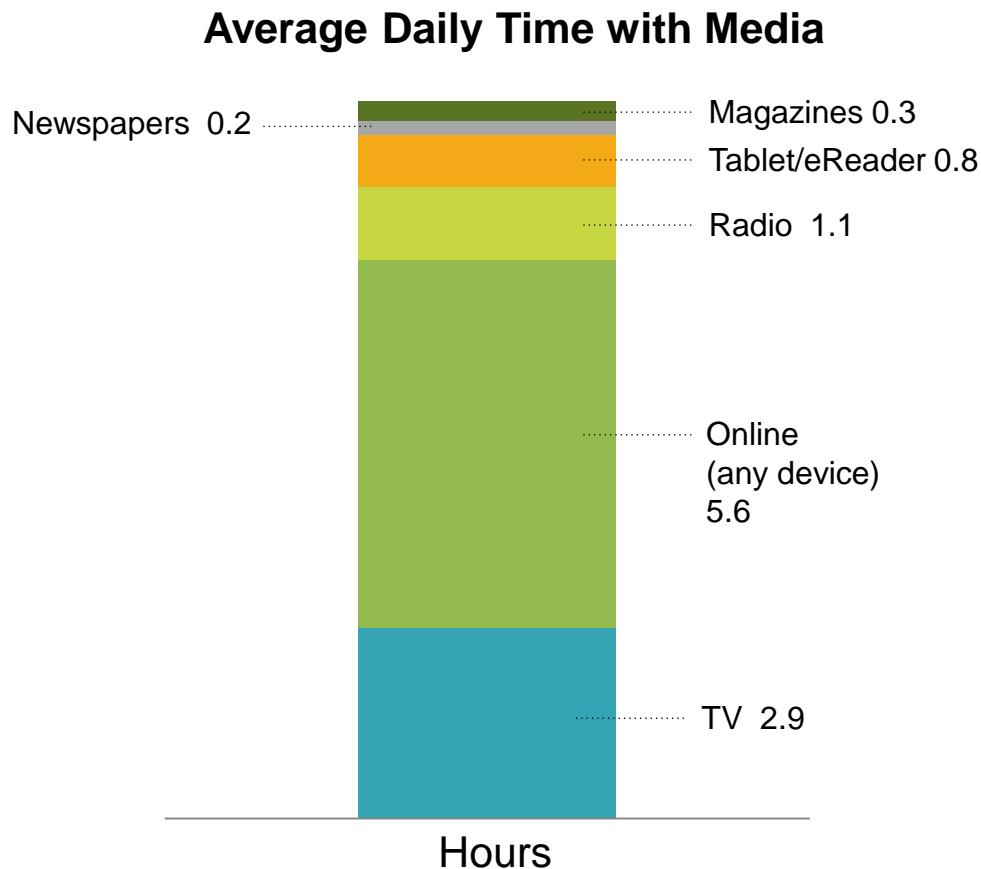
Compared with 3 years ago, which of these are you using more or less? (Among device owners)



More devices = more media time



In a typical day, how many hours do you spend with the following media?

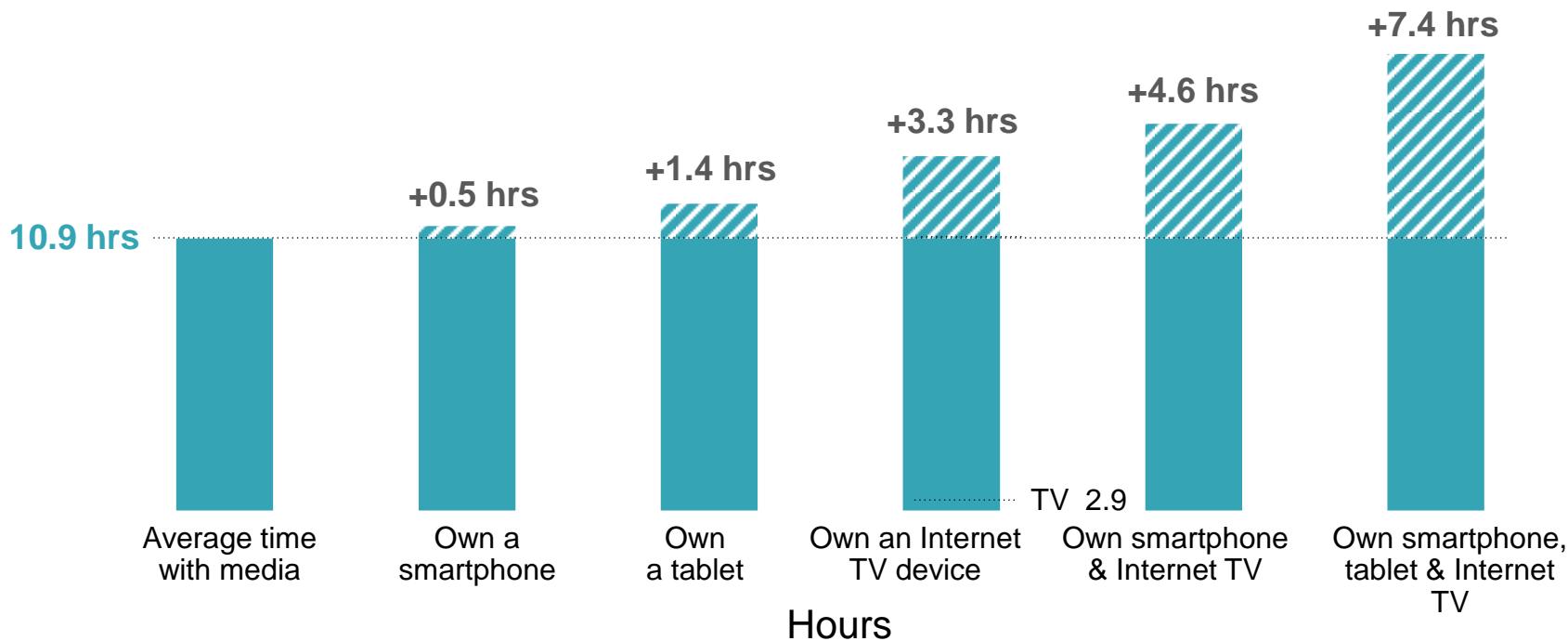


More devices = more media time



In a typical day, how many hours do you spend with the following media?

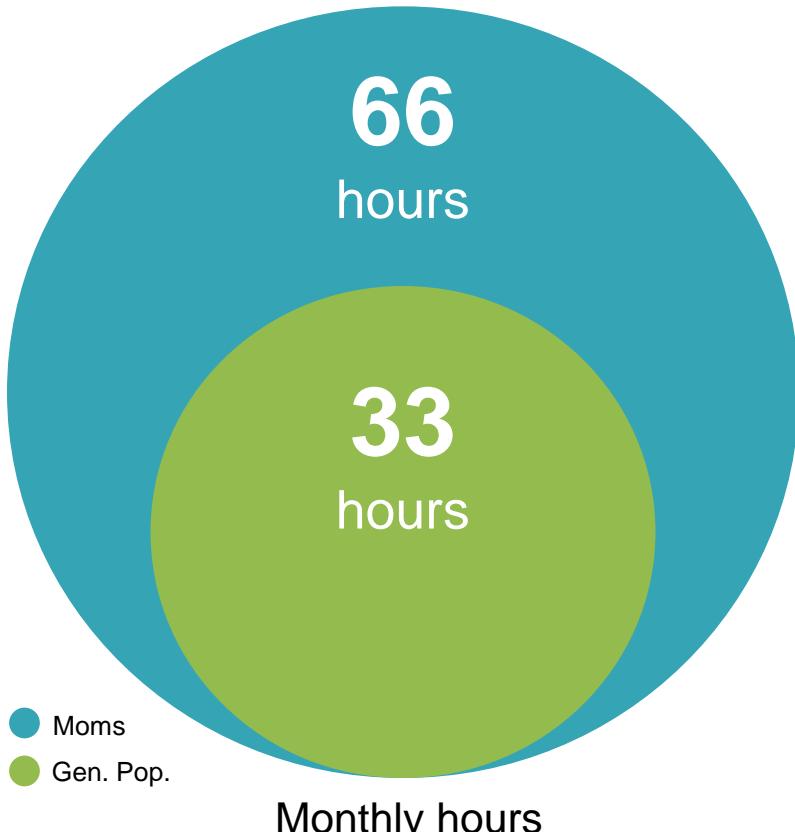
Average Daily Time with Media



Digital is Essential in Her Life

Moms live their lives online

2x time online



Fast Facts

Moms spend **63%** more time streaming online than the general online population

“I rely on the Internet for the weather, news, movie times, communication among friends, media and shopping.”

-BabyCenter Mom

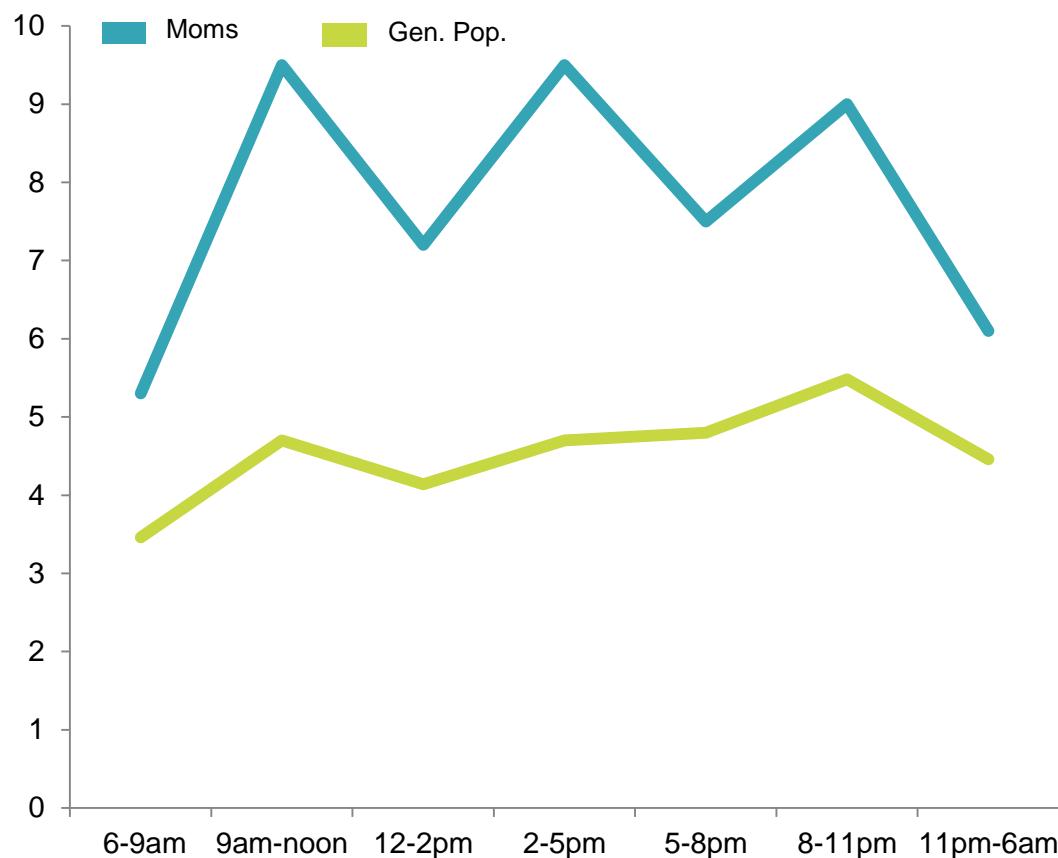
- Moms
- Gen. Pop.

Monthly hours

nielsen
Nielsen

For Mom, prime-time is online... ...All day long

Monthly online hours by daypart (weekday)



Fast Facts

Top sites (unique users)
female w/ kids under 3

Google
Facebook
Yahoo
YouTube
MSN

Amazon
Blogspot
Walmart
Target
Netflix

“ As a Stay-at-Home Mom I can't survive without the Internet and my laptop. I freak out if I can't get online. ”

-BabyCenter Mom

nielsen

Mom is finding new ways to get support

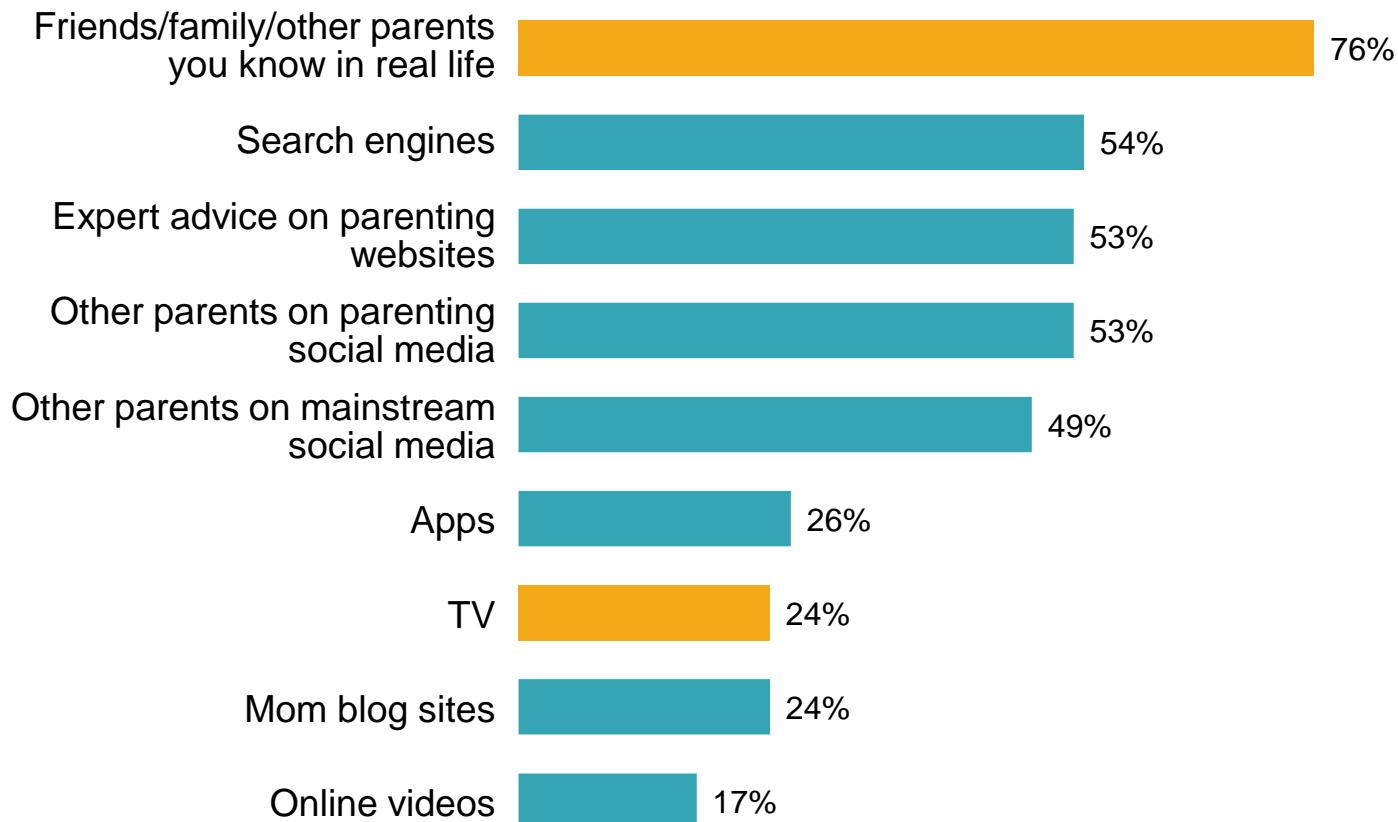


Q:

How often do you use the following for parenting-related information? (Daily or Weekly)

Digital

Non-Digital



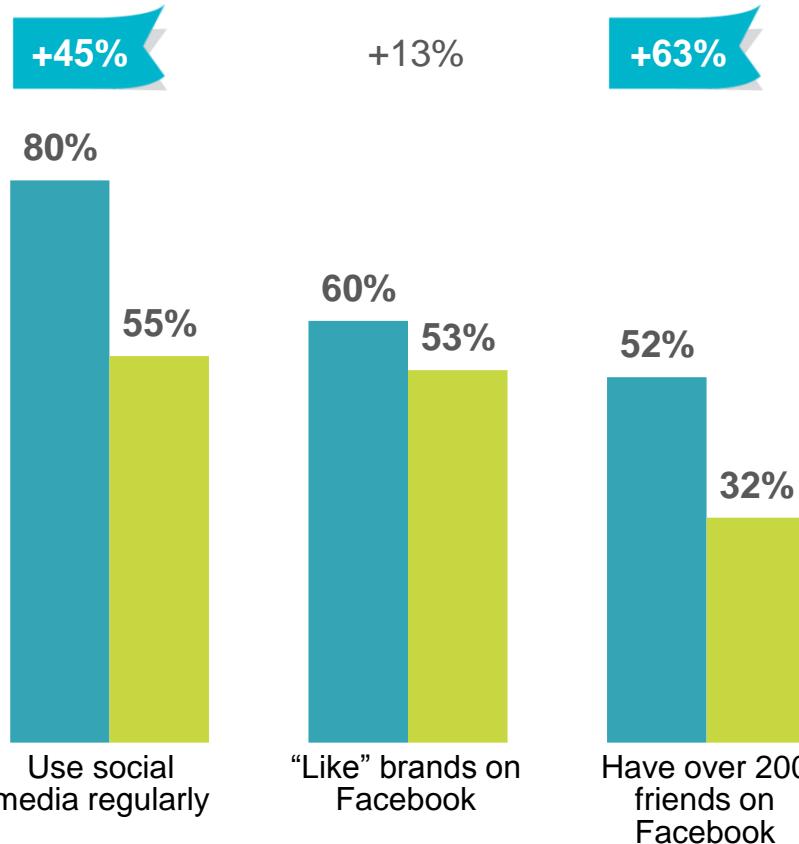
Moms are social super-heroes



Q:

Do you use social media regularly? Please describe how much you use each of the following:

Moms Gen. Pop.



Fast Facts

Moms spend **2X** time on Facebook monthly compared to gen. pop.

nielsen

“Facebook is the window to the outside world for stay-at-home moms. With the first child, it's your connection to friends, the broader outside world.”

-BabyCenter Mom

Mobile gives Mom super powers



Q:

What do you do with your mobile device?

Moms

Gen. Pop.

+21%
86%

71%

+34%

61%

46%

+55%

53%

34%

+53%

30%

20%

+58%

23%

15%

Texting

Mobile internet

Social media

Mobile banking

Mobile shopping

nielsen

Mary – The Mobile Master



PROFILE

Age 26

Chicago

7 year old and expecting

**Works as a cashier and going
to nursing school**

Bought a new smartphone

**Planning on purchasing a
Tablet**

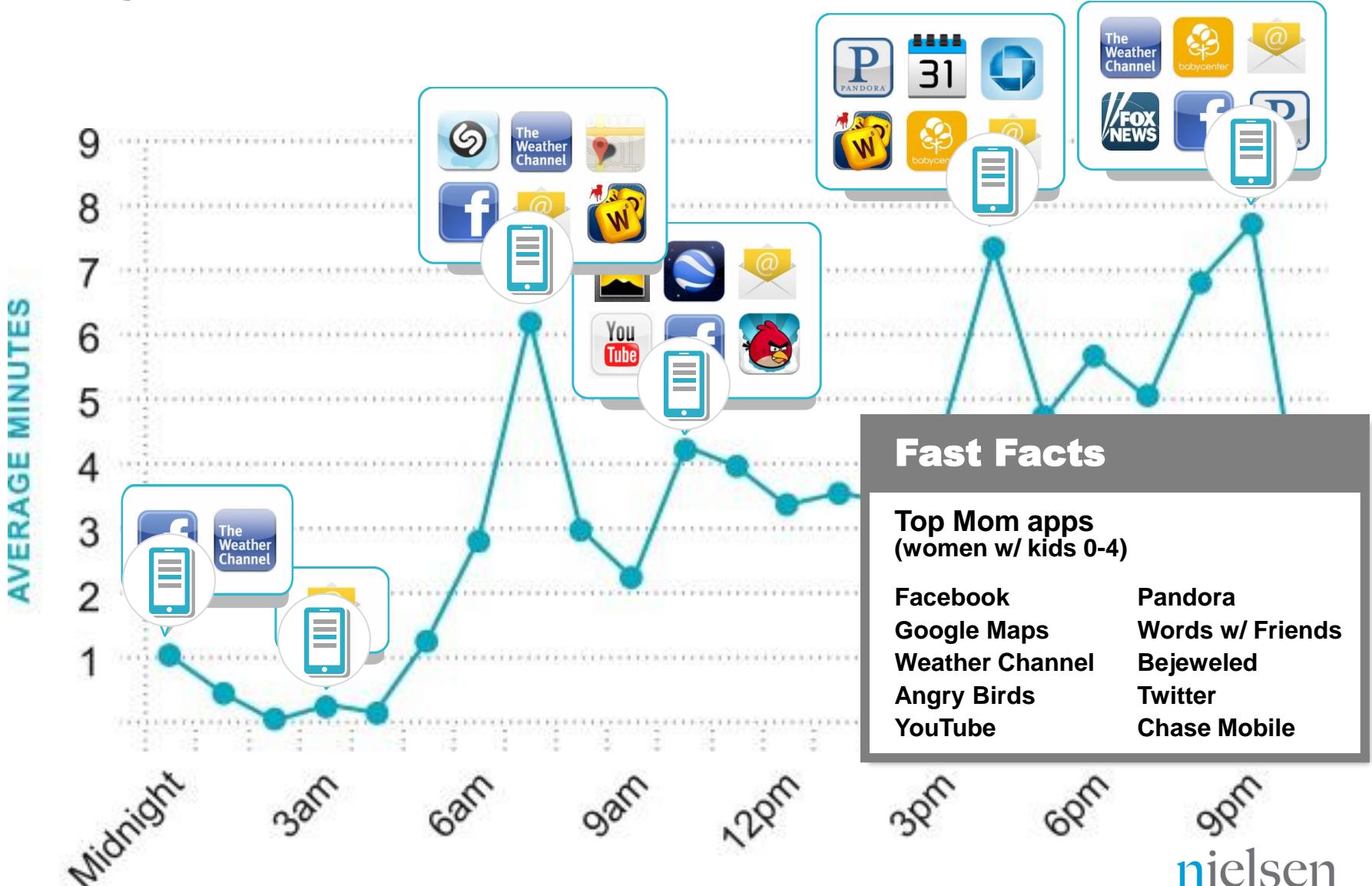
Streams YouTube on her TV

MEDIA HABITS

- Can't live without her phone
- Skypes her husband during the day
- Reads Fit Pregnancy magazine

“ I'll be on my laptop and watching TV and I hate to say this, but I'm also watching YouTube ”

Day in the life: Mobile Media Mom

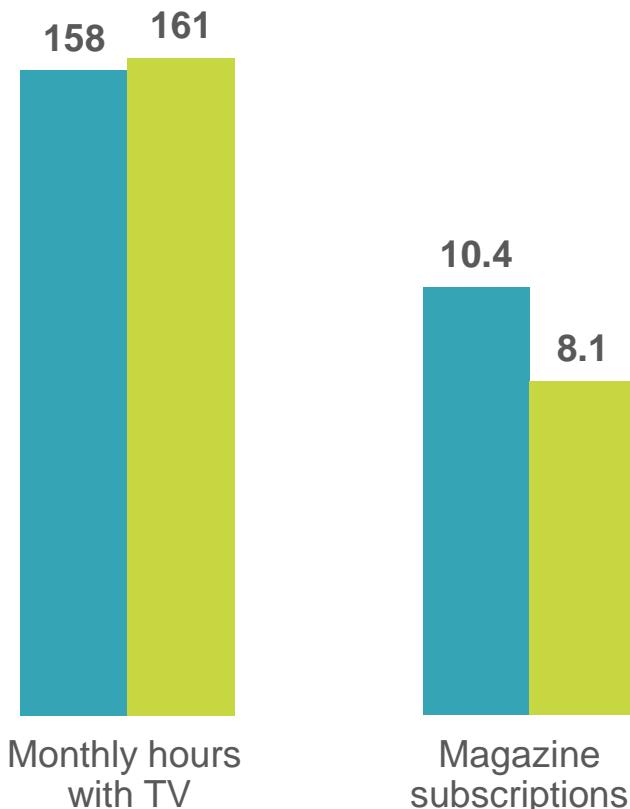


Media Mom is in Control

MediaM□M

Traditional media still plays a role

Moms Gen. Pop.



Fast Facts

17% of Mom's time with television is time shifted (142 index)

I used to get People, Us Weekly...Now the most I read is when I'm in the checkout line at Target. Now I go to People.com to see what weird names the celebrities gave their babies!

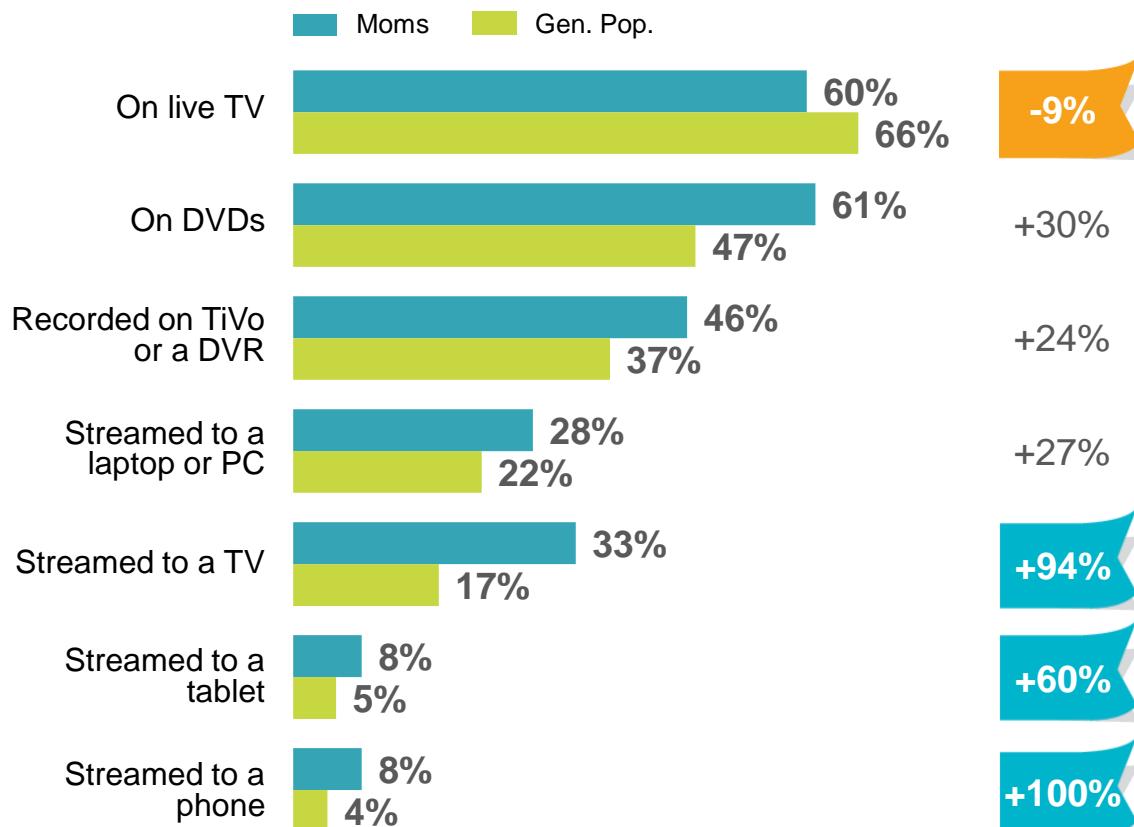
nielsen

But she's getting it on her own terms



Q:

There are many ways of watching movies, TV shows and other videos. How do you watch?

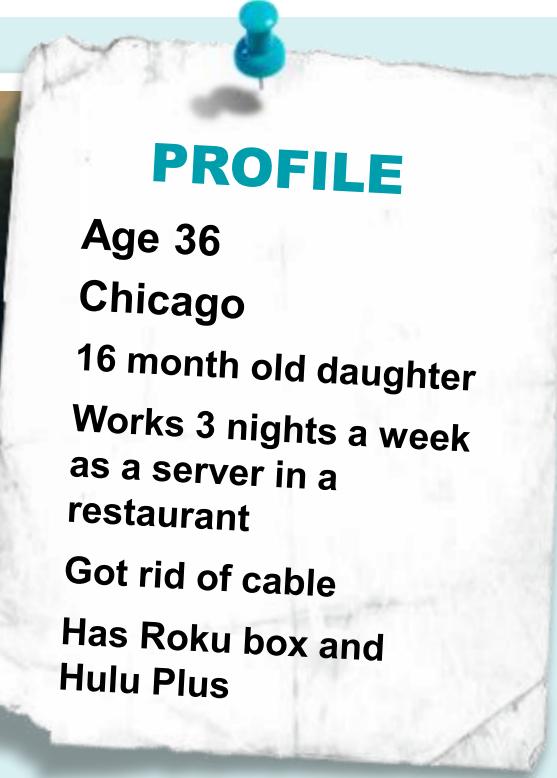


Fast Facts

29% of Moms with tablets watched a TV show on their tablet (112 index)

nielsen

Lora – The Cable Rejector



MEDIA HABITS

- “Go-to” online researcher
- Listens to NPR for news
- Scans bar codes on wine bottles
- Used meetup to meet other moms

“We got rid of cable a year and a half ago. I can still watch my shows through Hulu Plus.”

Mom is maximizing her media time

More likely to be engaged in other activities while watching TV

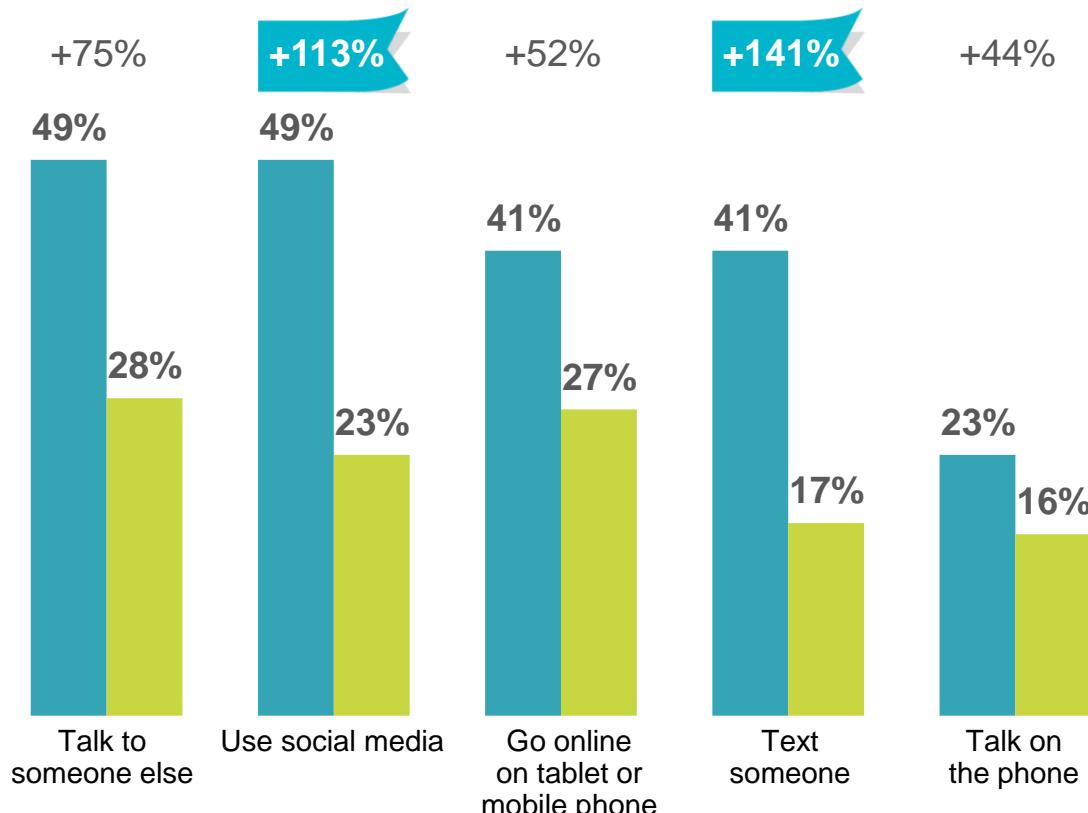


Q:

When you are watching movies, TV, or other video, how often do you also do the following? (always/often)

Moms

Gen. Pop.



Fast Facts

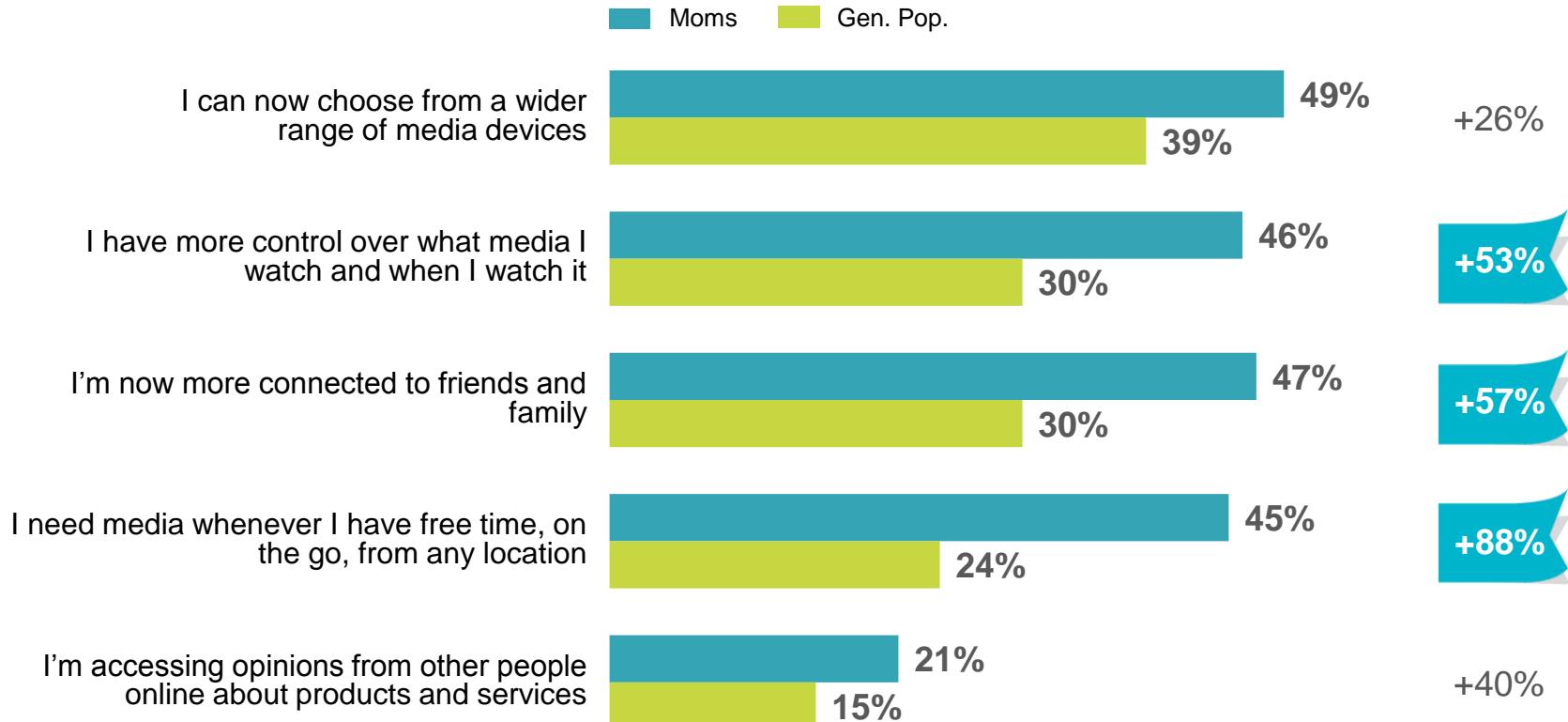
More than twice as likely to use social media or text someone while watching TV

Her life requires flexibility



Q:

Which of the following reasons describe why your media habits may have changed in the past 3 years?



Spotlight

Media tradeoffs



VS



Her Path to the Register Has Evolved

egg.com
POWERED by SERVICE™

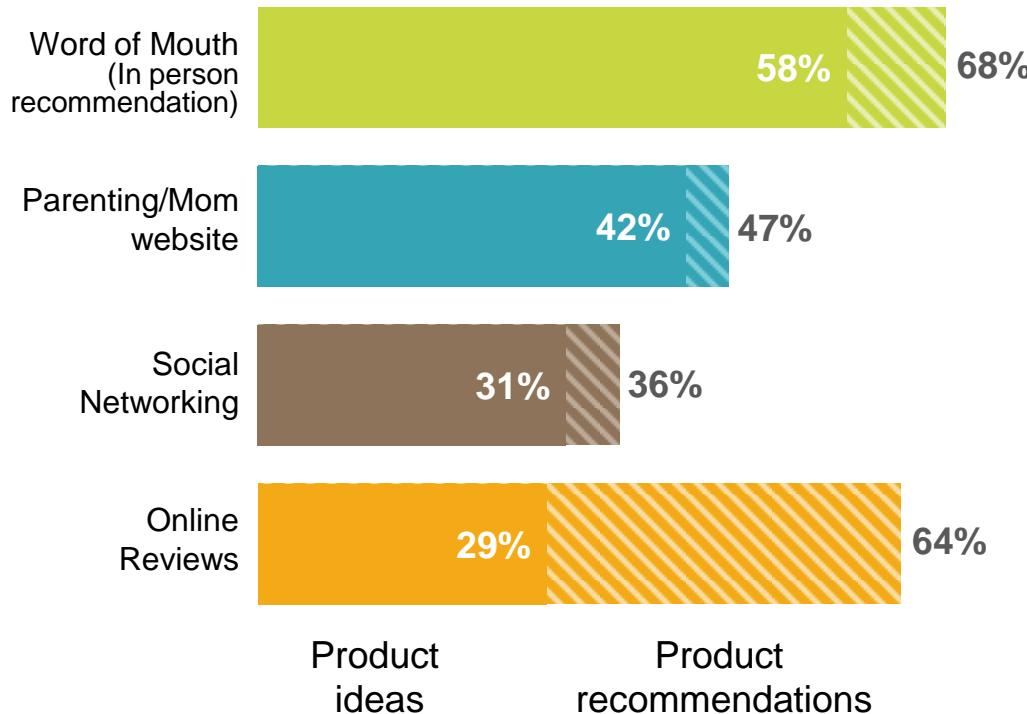
MediaMOM

She still relies on recommendations



Q:

Imagine you are going to buy a new product. How would use each of these resources throughout the shopping process?



Fast Facts

Moms spend **60%** more time on Blogs than general online population.

nielsen
.....

“ We have this blog in Oak Park – it has all the wants and needs for moms in the neighborhood. It's awesome!

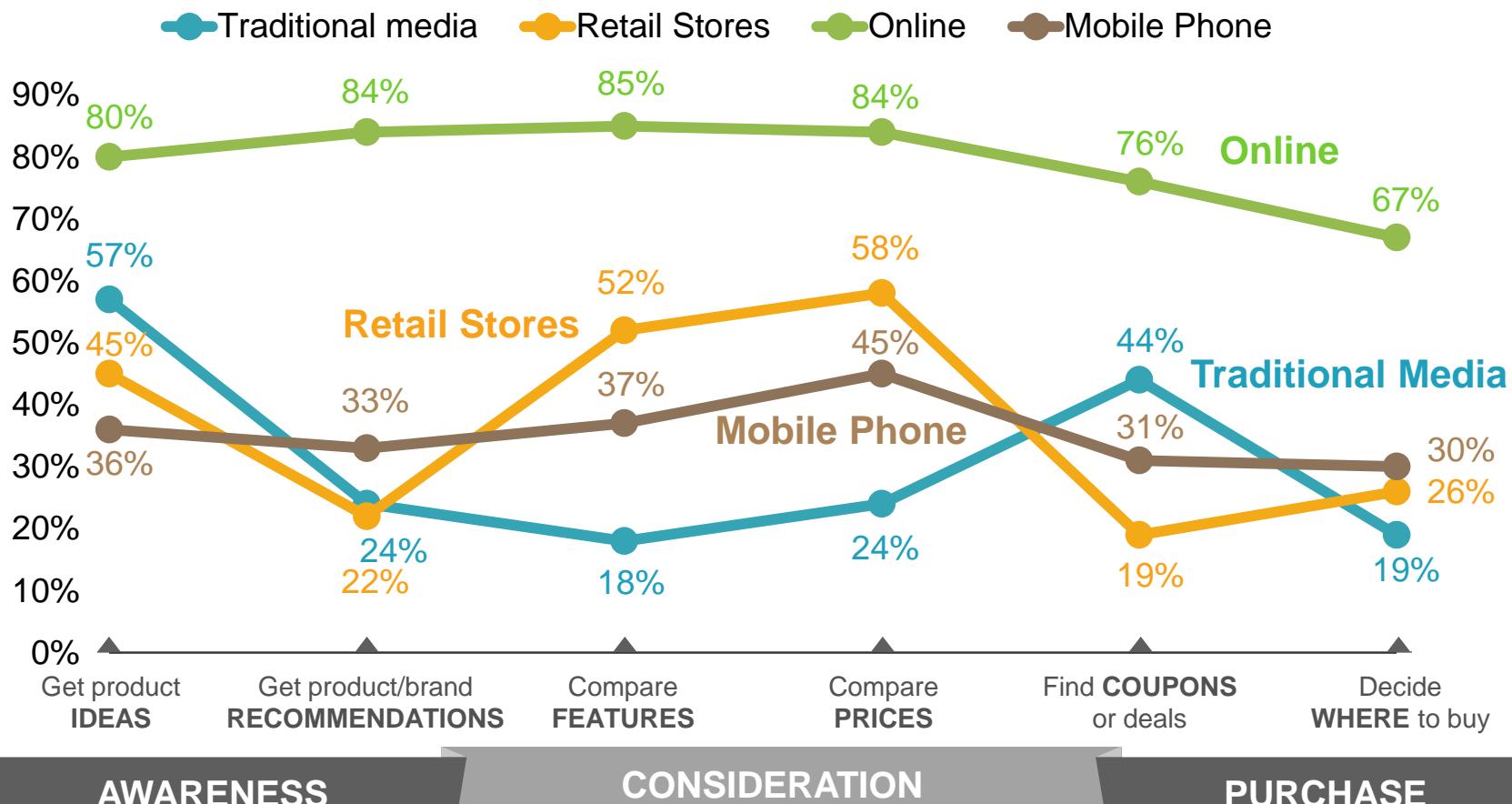
-BabyCenter Mom **”**

Online is critical in the purchase process



Q:

Imagine you are going to buy a new product. How would you use each of these resources throughout the shopping process?

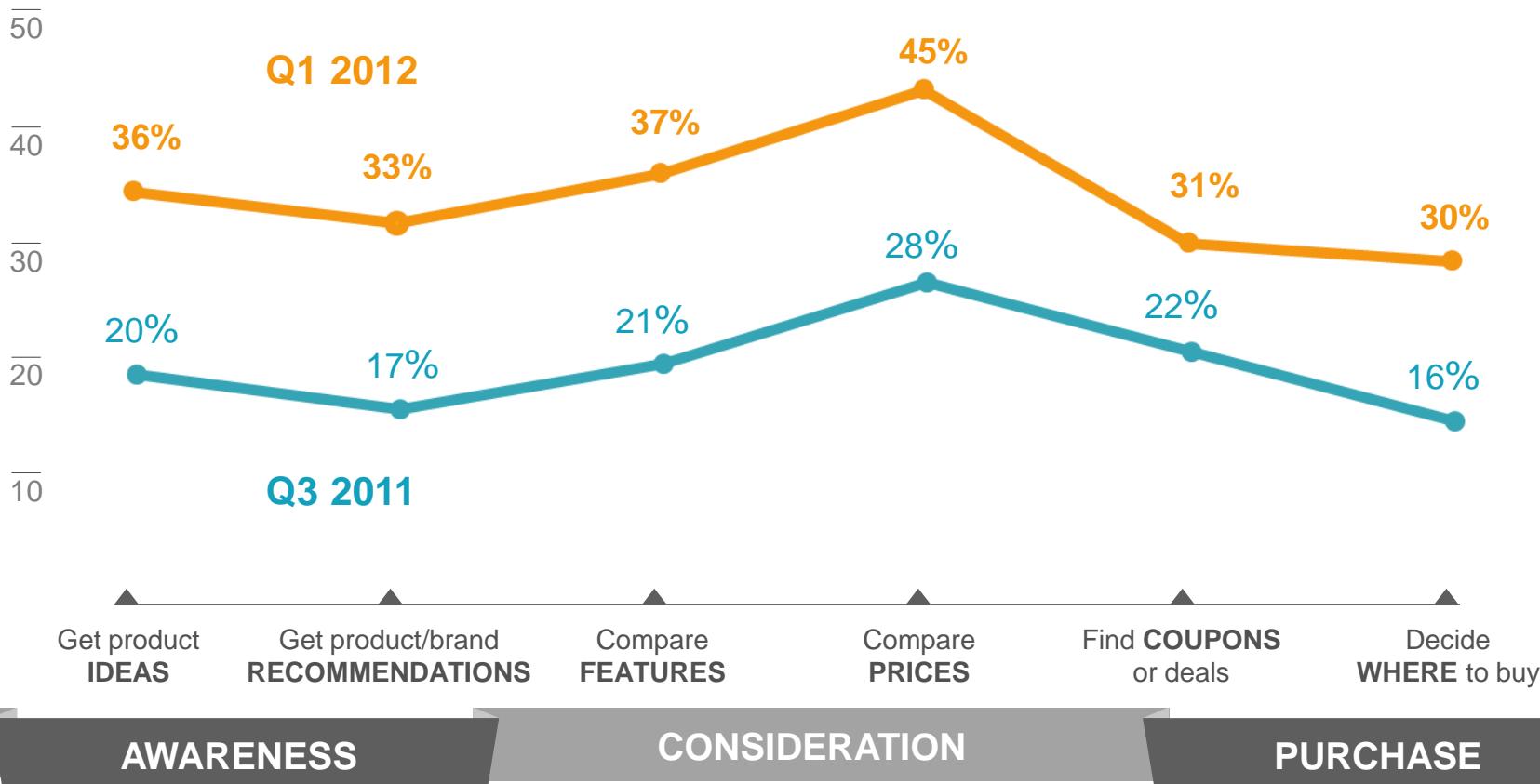


Reliance on mobile is increasing dramatically



Q:

Imagine you are going to buy a new product. How would use **your mobile phone** throughout the shopping process?



Spotlight

Mobile simplifies her life



SCAN THE RED STAR WITH YOUR SMARTPHONE'S QR READER, AND YOU COULD WIN A MACY'S SHOPPING SPREE WORTH UP TO \$500!
FIND OUT MORE

YOU'RE IN! WATCH EXCLUSIVE FASHION TIPS, INSIDER ADVICE FROM OUR STARS & MORE

MACY'S BACKSTAGE PASS

Share This Site | Like | Comment | 2K

see how it works
Macy's Backstage Pass

accessories with
Carlos Santana

spring must-haves
Rachel Roy

dress for success with
Donald Trump



“ Scanning bar codes is empowering people to know what things really cost and what the markups are...I can scan a bottle of wine at a restaurant and find out I can buy it for \$15.

— Lora, Chicago

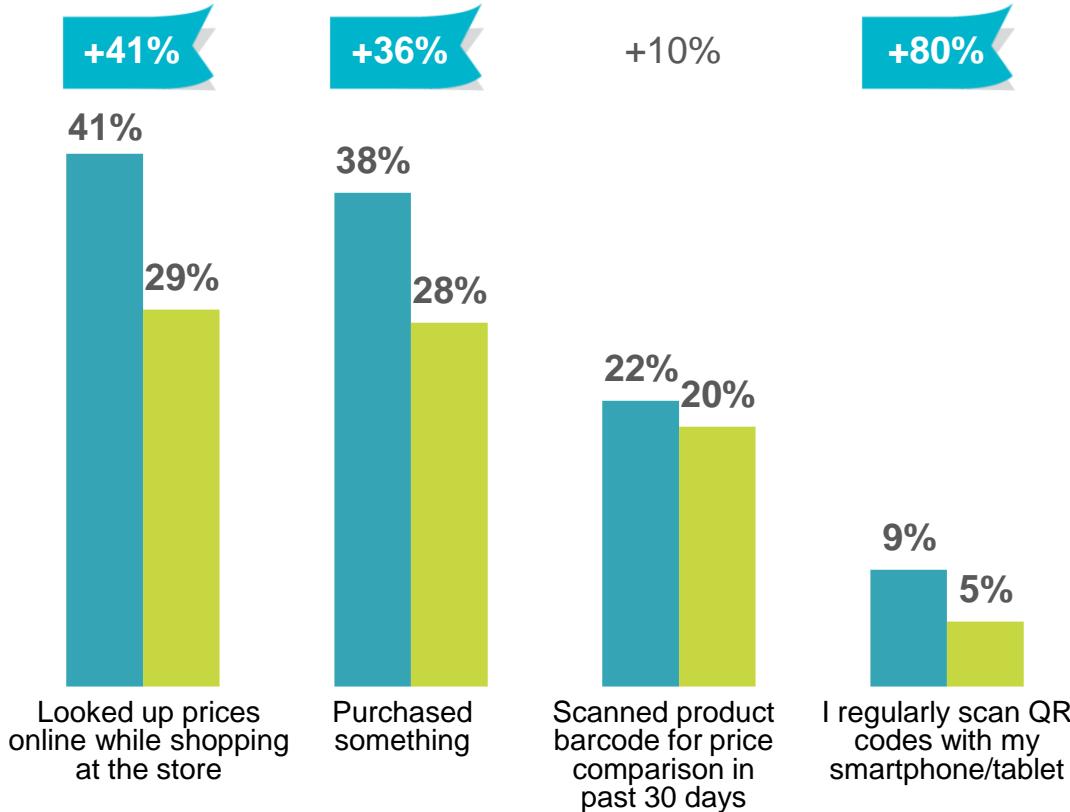
Mobile as shopping sidekick



Q:

Which of the following have you done in past 30 days with your smartphone or tablet?

Moms Gen. Pop.



Fast Facts:

1 in 5 have scanned a product barcode for price comparisons in the past 30 days (110 index)

“There’s also an app, ShopSavvy, you can use to scan bar codes. I scan the box of diapers at home and you can find where to get them the cheapest.”

-BabyCenter Mom

Sarah – The “Social”-ite



PROFILE

Age 30
San Francisco
5 month old son
Works full time in human resources
Owns tablet, smartphone, laptop, Wii
Has cable and DVR

MEDIA HABITS

- Addicted to Amazon Price Checker
- 100 friends follow her tweets
- Listens to spotify
- Has YouTube channel to entertain her son

“ My day begins on my phone. I'll check Twitter, see what my friends are tweeting about, then head onto Facebook. **”**

A photograph of a man in a dark suit and tie holding a baby in a modern office environment. In the background, there's a large window showing a city skyline at night with lit-up buildings.

Media Mom is Changing the Rules for Marketers

MediaM□M

Her media choices demand attention

MOBILE

Mom is 50% more likely to shop or bank on her mobile phone.

ONLINE

Mom spends twice as much time online as the gen. pop.

TELEVISION

42% more of her time with television is time-shifted, compared to gen. pop.

SOCIAL

80% of moms use social media regularly; over half use social media on their mobile device.

How do you engage with her when...

Everything has changed for her

Priorities, preferences, social circles – **how does your brand fit and support her new life?**

New solutions are a must

Digital solutions make it easier than ever for her to optimize her time, money, and media – **how is your brand empowering her?**

There is no “regularly scheduled programming”

You are competing for her attention – **how are you breaking through?**

She is plugged in

Scanners, comparative shopping, social networks, reviews, WOM – **how are you fitting into her new shopping behaviors?**

Some brands are doing it well



Chrysler

67% of women will buy a new car to accommodate their growing family.

Step 2: Choose a Pledge Location

Step 3: Test Drive Town & Country

= Money for your local school!

Source: BabyCenter 21st Century Mom® Insights Series, June 2010

Target

Given the choice, 50% of moms would shop exclusively online.

A woman wearing a red short-sleeved button-down shirt is standing with her arms raised, palms facing forward. She appears to be cheering or celebrating.

Verizon

44% of moms say parental controls factor into technology purchasing decisions; a 4x increase.

A close-up shot of a person's hands holding a black smartphone. The Verizon logo is visible in the top right corner of the slide.

Moms expect more from advertising



Q:

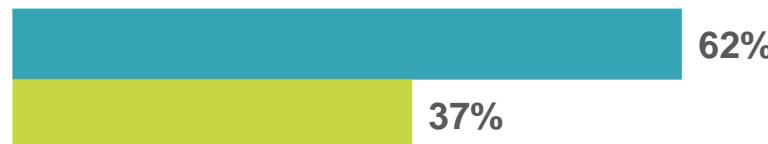
I am more likely to pay attention to an ad that...

Moms Gen. Pop.

Has a coupon or offer



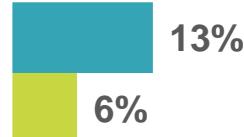
Relates to my
lifestyle/personality



Is funny



Includes a contribution to a
charitable organization



Spotlight Messaging to Media Mom

Giving back

Kohl's Cares Scholarship Program
Tell us a story about a stand-up kid

Inspiring stories inspire all of us. Share your story about a kid who is making a difference and that kid would win up to a \$10,000 scholarship. Nominate by March 15 at www.kohls.com/cares.

Kohl's Cares' Scholarship Program
Top winners receive \$10,000 each

Every year, Kohl's recognizes and rewards young volunteers (ages 6-18) across the country for their amazing contributions to their communities.

Coupon/offer

Kohl's Cash®

Get \$10 Kohl's Cash® for every \$50 you spend.

From December 14-24, get \$10 in Kohl's Cash for every \$50 spent in store and online on all sale-, regular- and clearance-priced merchandise!

Fit my lifestyle

Spotlight

Messaging to Media Mom

The advertisement features a woman in a purple tank top and striped shorts, standing on a beach. To her left is a vertical column of text listing various activities:

- Get born.
- Find a group.
- Find a job.
- Find the one.
- Have one.
- Have two.
- Roast a chicken.
- Cut bangs.
- Run.
- Breathe.
- Run.
- Relax.
- Run a 5K.
- Run a 10K.
- Crunch.
- Listen. Listen. Listen.
- Be loved.
- Look lovely.
- Do good.
- Give back.
- We kick asphalt.
- Power to the She.

ATHLETA

Visit athleta.com or call 1.877.334.4433 to request a free catalog.

Free Shipping!

The advertisement features a woman in a purple tank top and black shorts running outdoors. The background shows a coastal landscape with water and rocks. The text includes:

ATHLETA

Somebody Has to Run This World
(and in performance apparel that looks this good, it may as well be you)

SLEEVELESS TWIST TOP
Supreme seamless comfort.

No hassle returns

On any domestic order over \$50.
No code. No hassle.

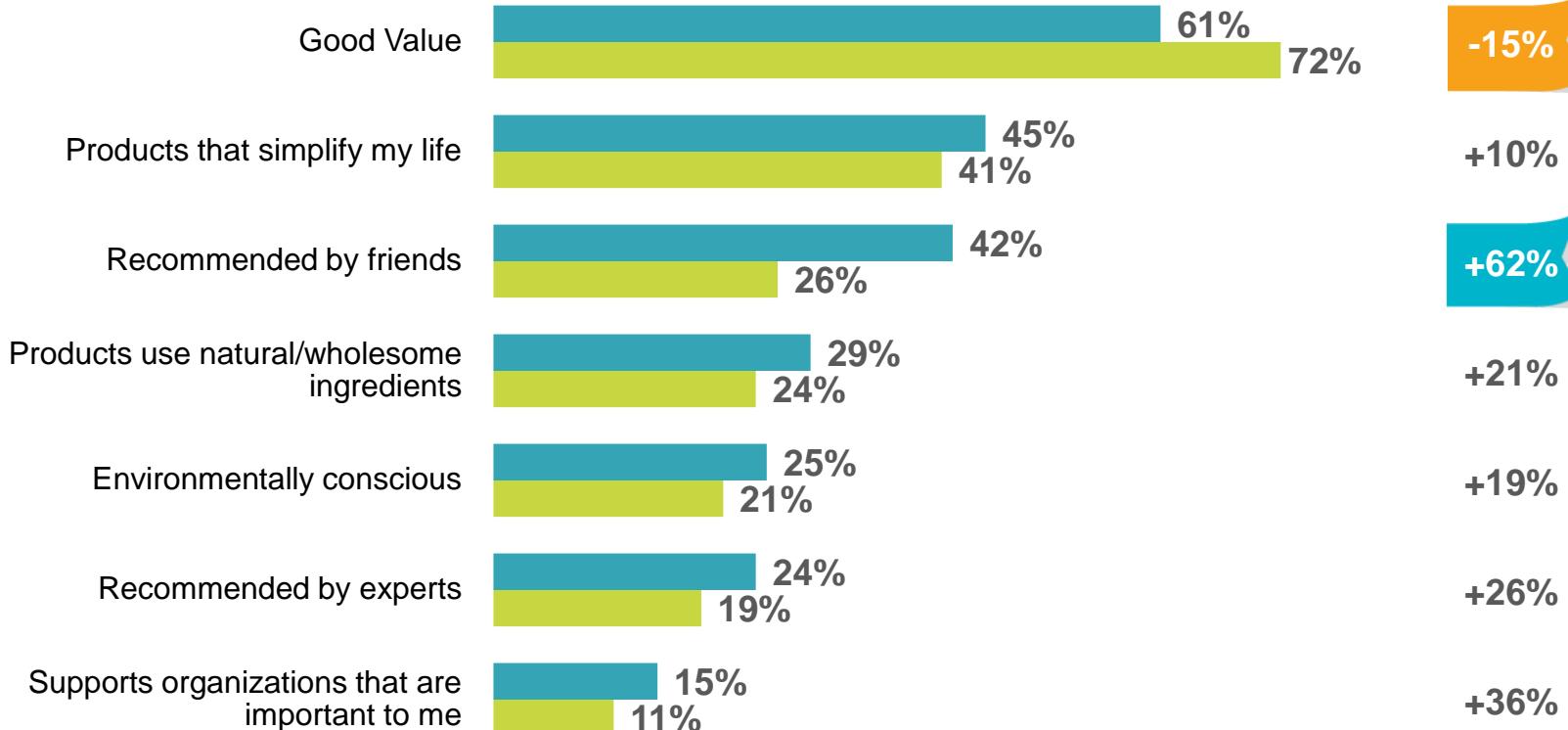
She also expects more from brands



Q:

What are the most important characteristics of brands that speak to you?

Moms Gen. Pop.



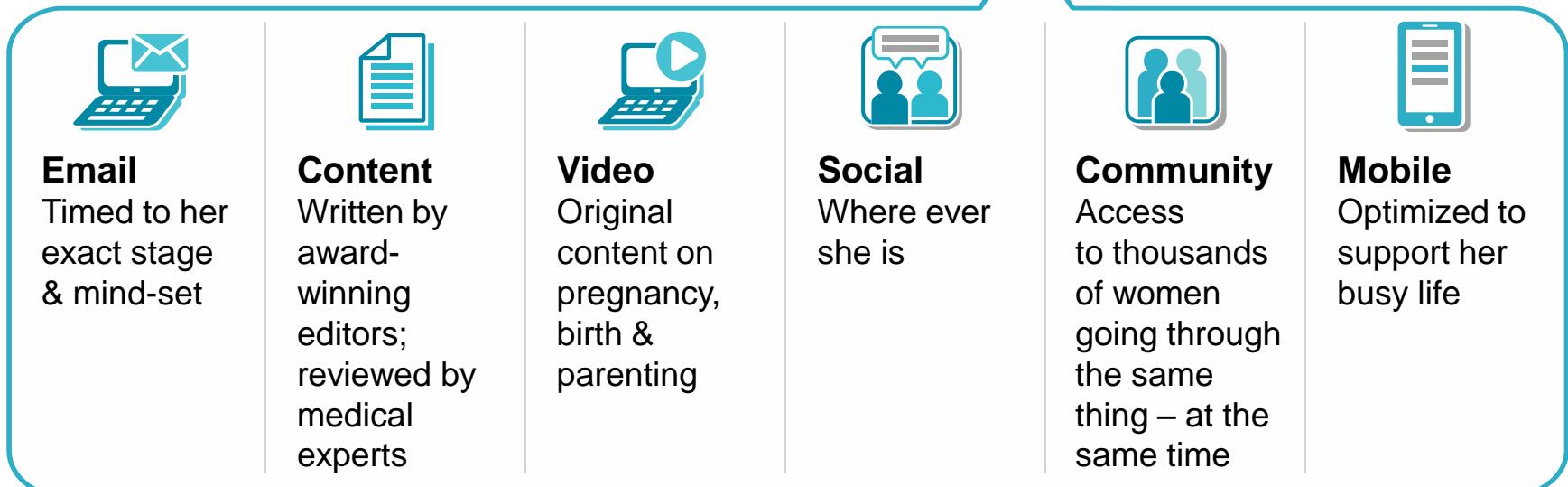
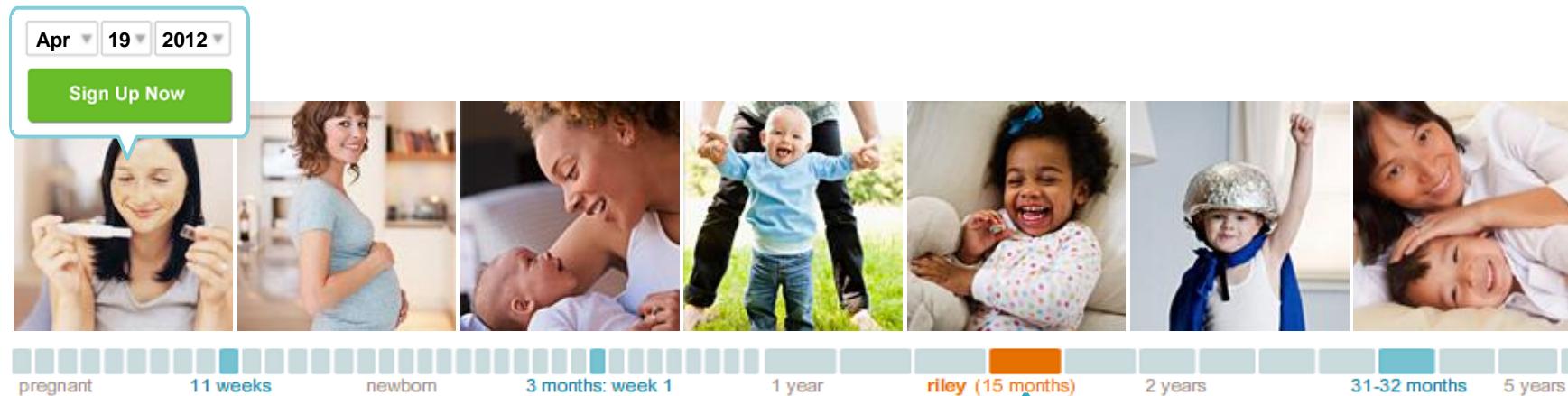
Spotlight

Messaging to Media Mom



Remarkably right. Now.

Meeting her needs at every stage of the journey



The new rules for marketing to Media Mom

1

Understand the transformation of motherhood and how it changes women's media habits

2

Anticipate her new needs, behaviors and how to reach her when she needs you

3

Map her media journey, embrace the disruptors and engage her where she is most receptive

4

Turn insights into action and be always on...because she is



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

Email solutions@babycenter.com