



2012 Global Media Mom

A **21STCENTURYMOM**® Insights Series

June 2012

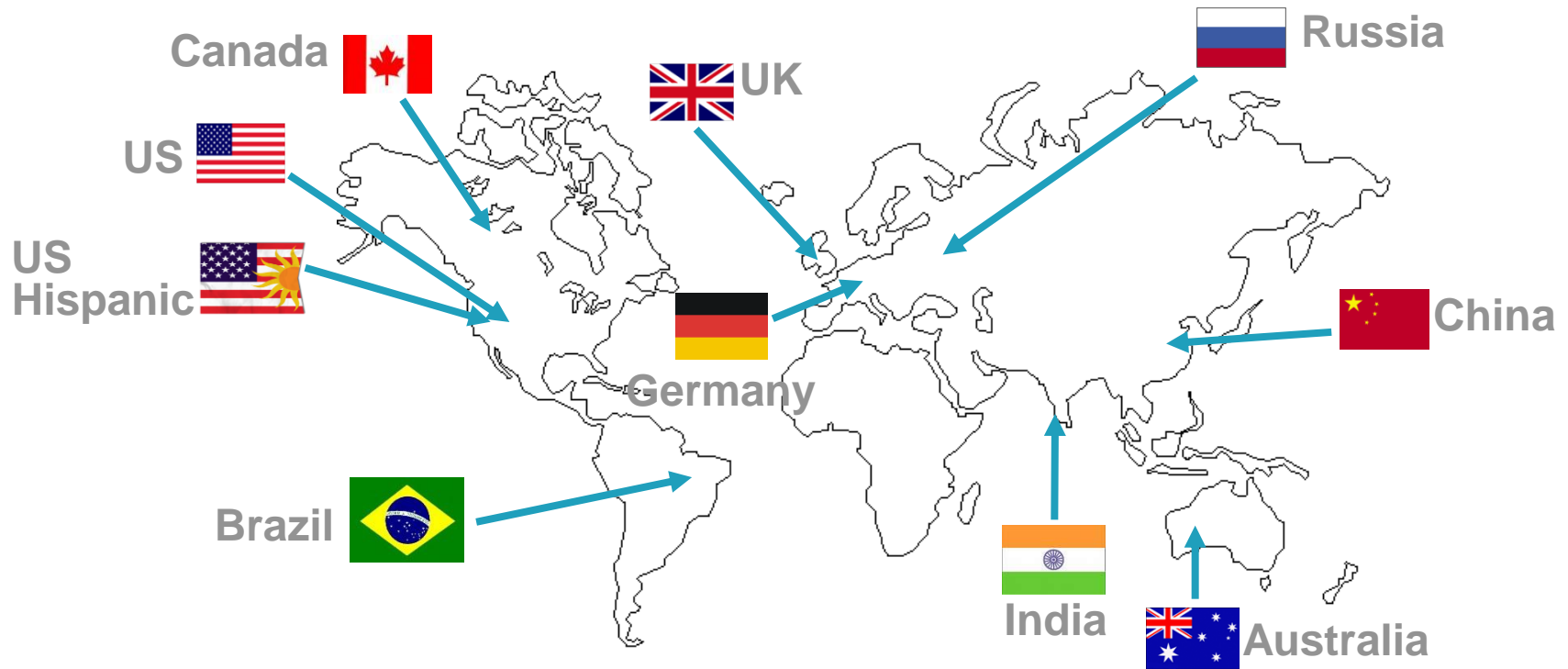
Media**M****M**



Study Methodology

Online new & expectant moms (pregnant or with children 0 to 7)

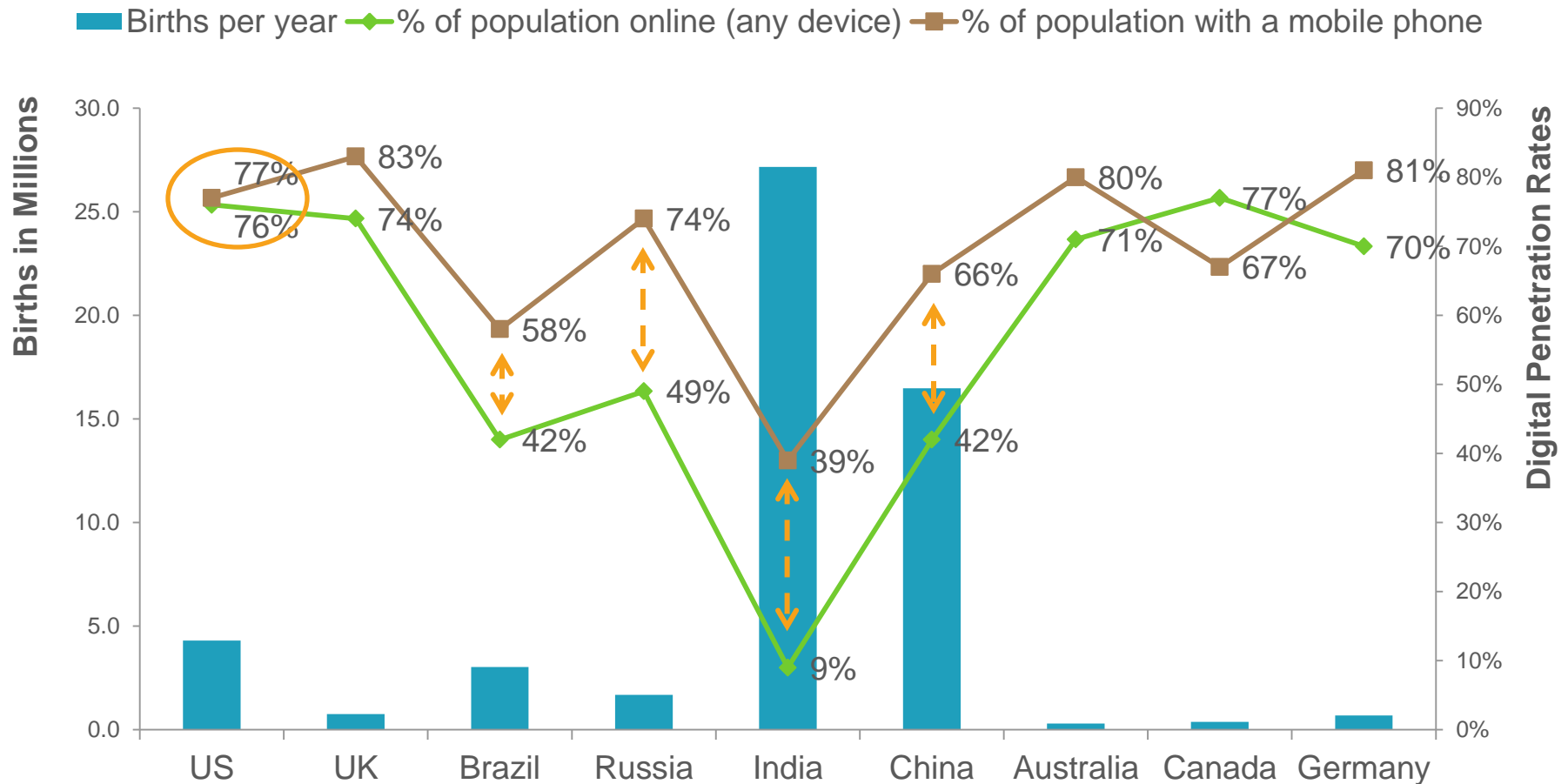
Recruited online via BabyCenter 21st Century Mom[®] Panel and global sites in 10 markets, 6 languages



Sample Size: n=300+ in AU, IN, CA; n = 400+ in DE, RU, n=500+ in USH, CA, n=855 in BZ, 1,000+ US and China

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Market size and digital penetration varies dramatically from country to country



Source: UN Data, Annual number of births, April 2012, eMarketer Internet Users Comparative Estimates (% of population), February 2012, eMarketer Mobile Internet User Penetration Worldwide by Region and Countries 2010-2016, April 2012.

Agenda

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

Meet the 21st Century Global Media Mom

MediaMOM

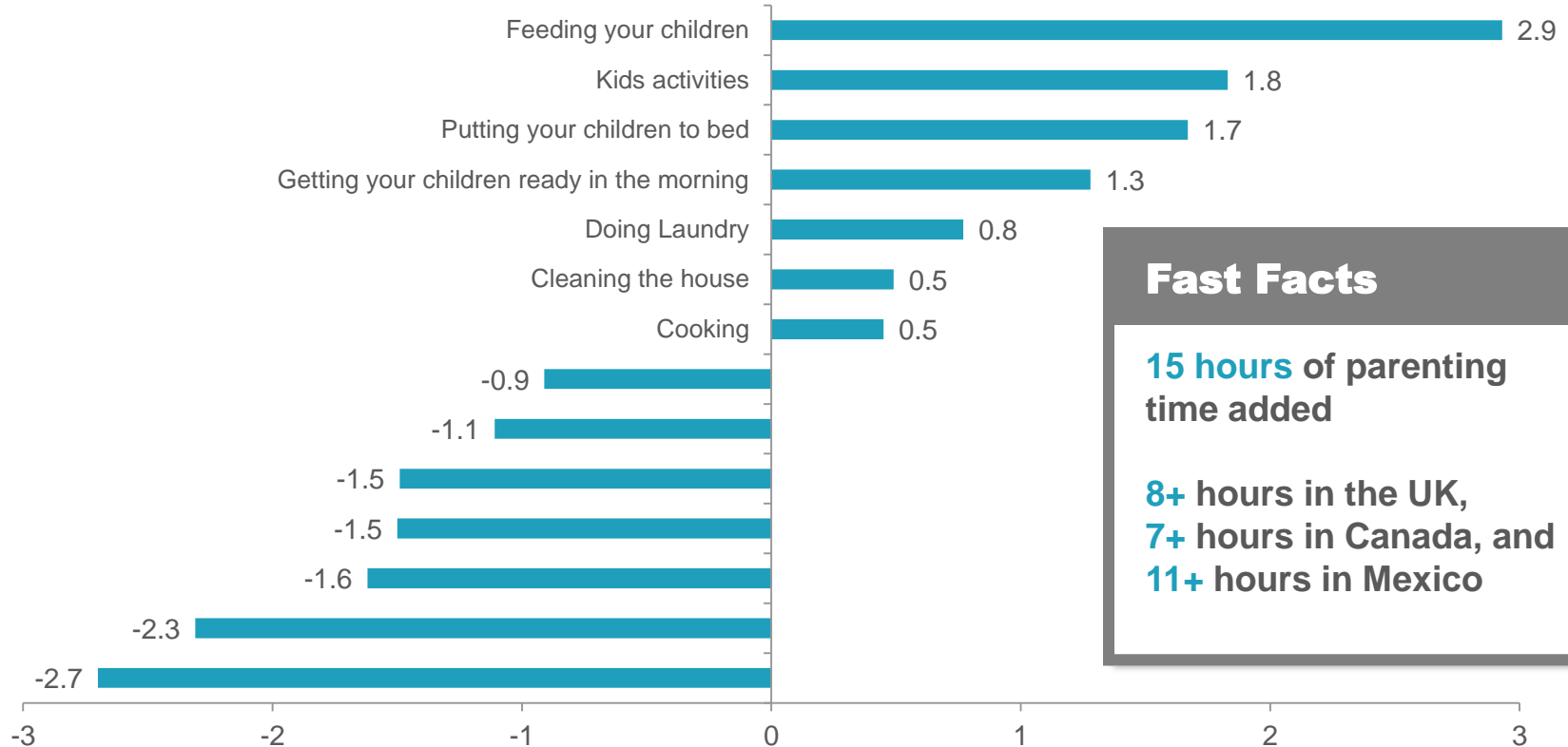
She spends her time differently



Q:

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

Change in # of hours



Fast Facts

15 hours of parenting time added

8+ hours in the UK,
7+ hours in Canada, and
11+ hours in Mexico

Motherhood impacts media usage

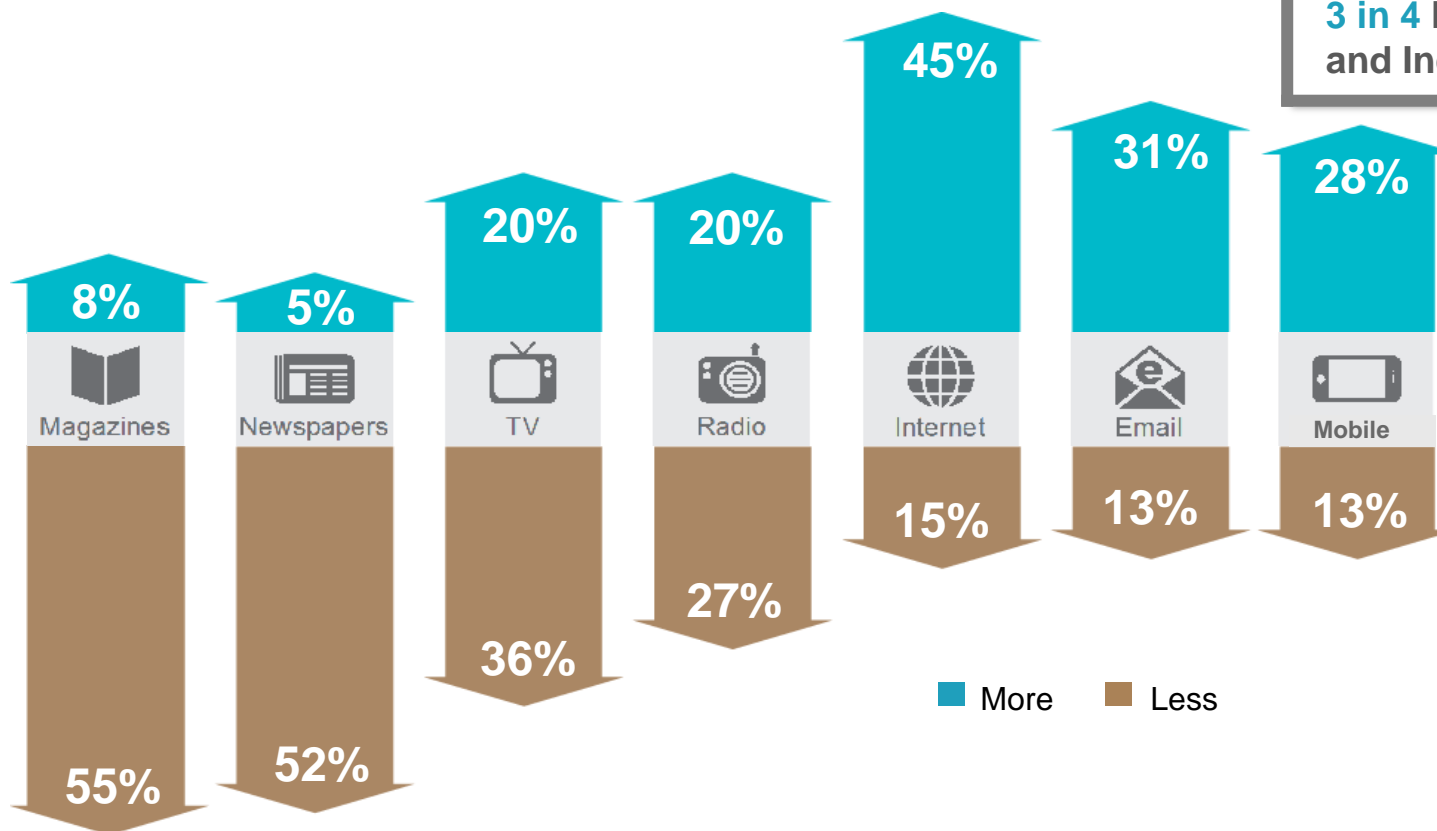


Q:

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

Fast Facts

32% of US Moms use the Internet more, after becoming moms
3 in 4 Moms in China and India watch less TV



Adoption rates differ by country

Q:

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



USA



UK



Brazil



Russia



India



China



Australia



Canada



Germany



US Hispanic



Laptop

80%

86%

55%

71%

70%

58%

77%

80%

85%

58%



Smartphone

65%

72%

25%

28%

19%

62%

68%

58%

41%

58%



TiVo or DVR

47%

38%

19%

7%

11%

54%

38%

37%

22%

20%



Tablet

29%

18%

9%

9%

6%

15%

18%

23%

7%

16%



Internet TV device

22%

12%

11%

6%

5%

16%

15%

17%

8%

14%

High

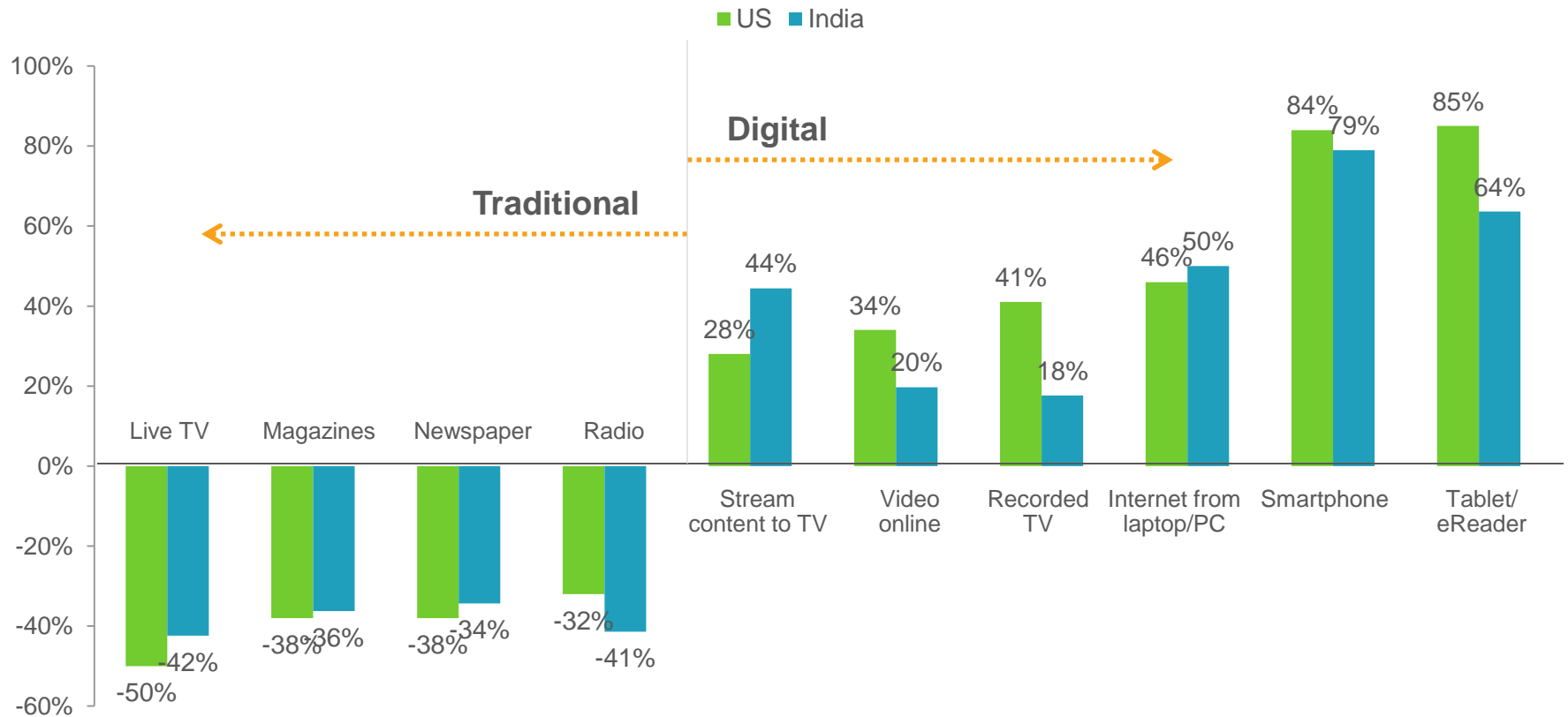
Low

Global Media Mom is moving to digital



Q:

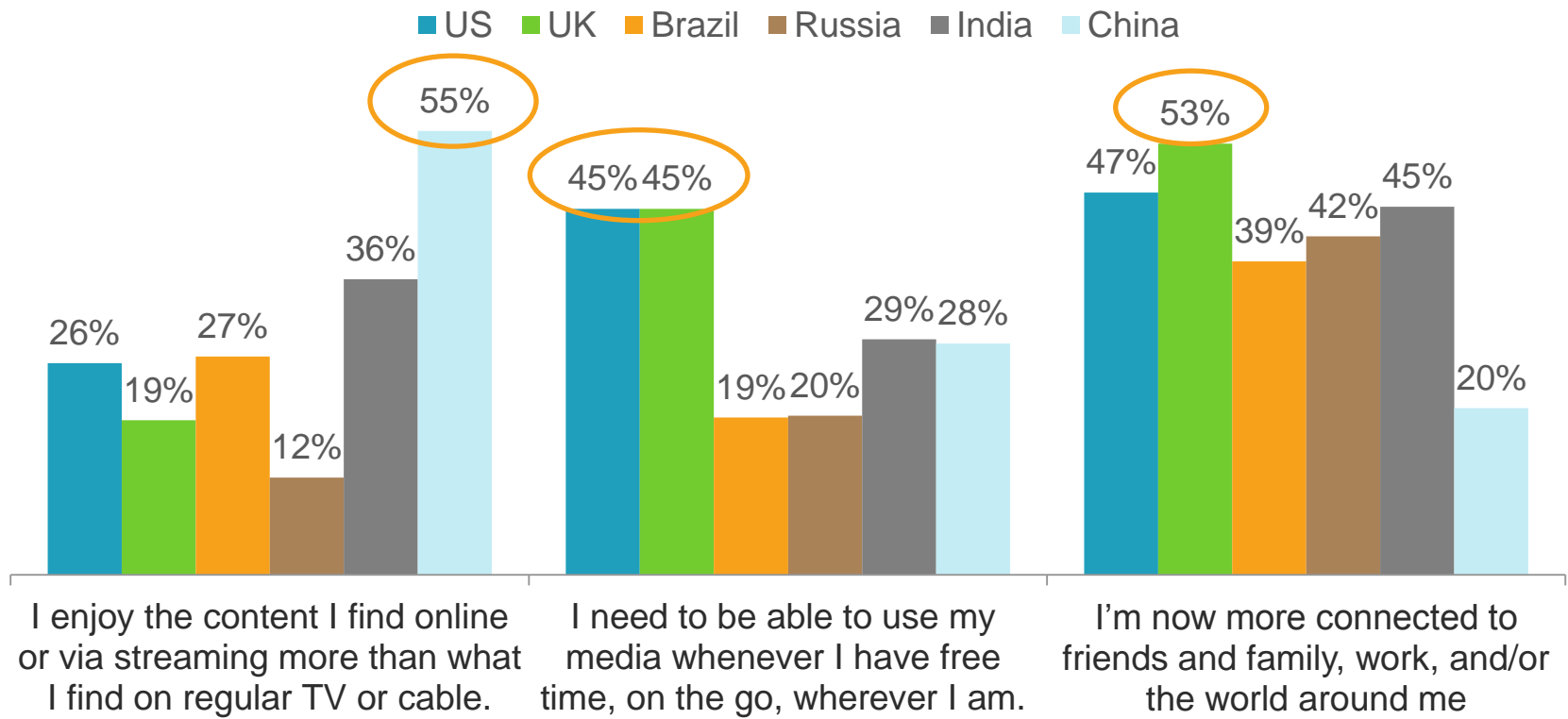
Compared with 3 years ago, which of these are you using more or less? (among device owners)



Her life requires flexibility, plus digital offers the choices & connection she seeks

Q:

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

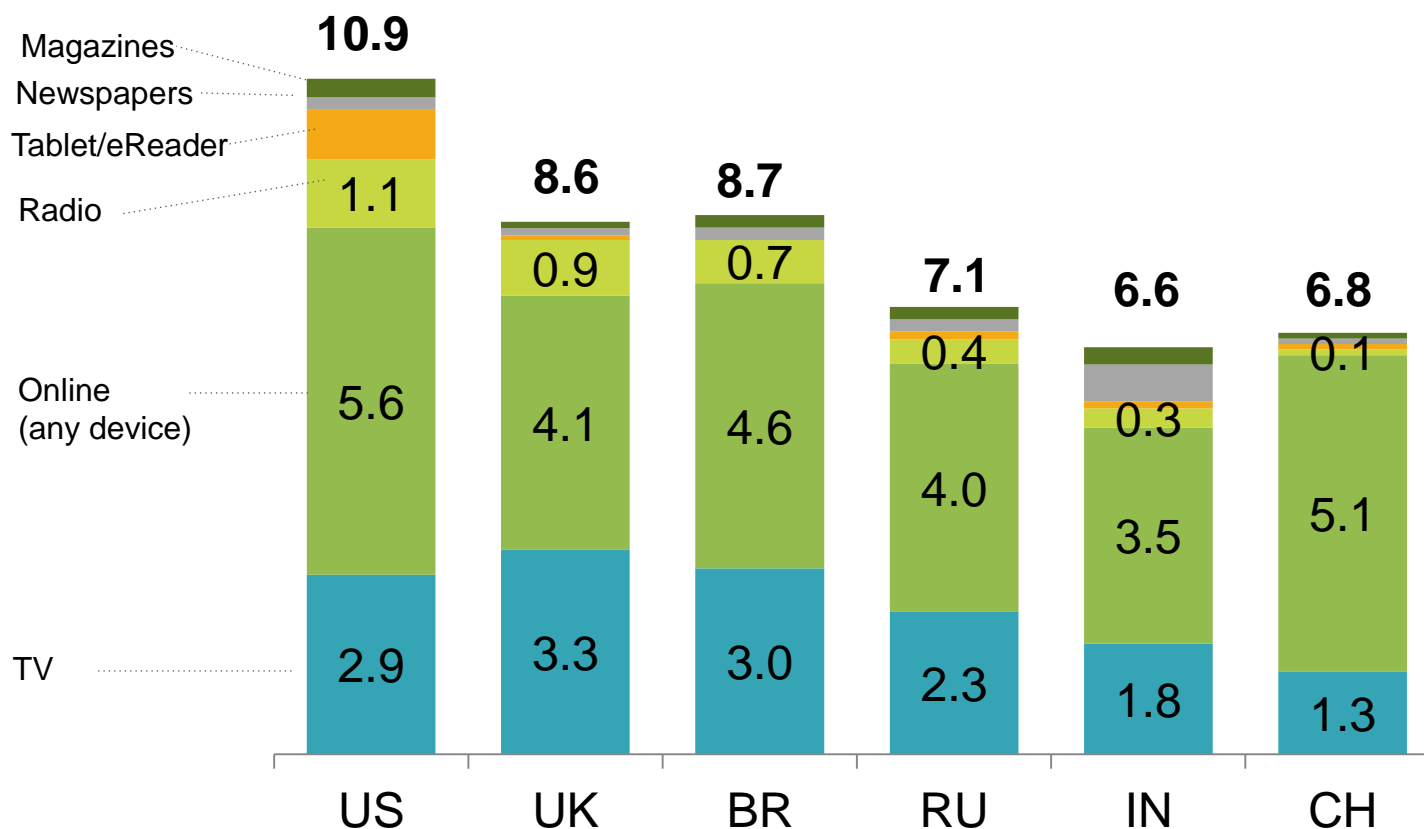


Technology adoption impacts her media consumption



Q:

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



More devices = more media time



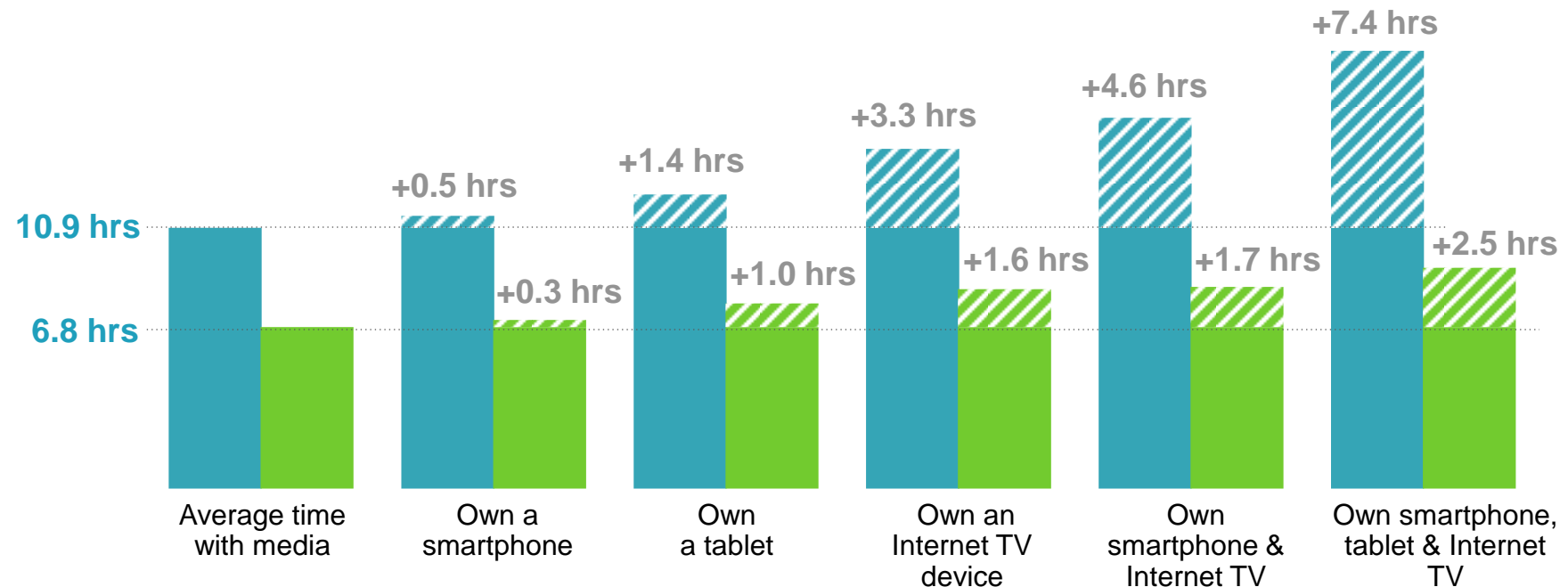
Q:

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

Average Daily Time with Media

■ US

■ China

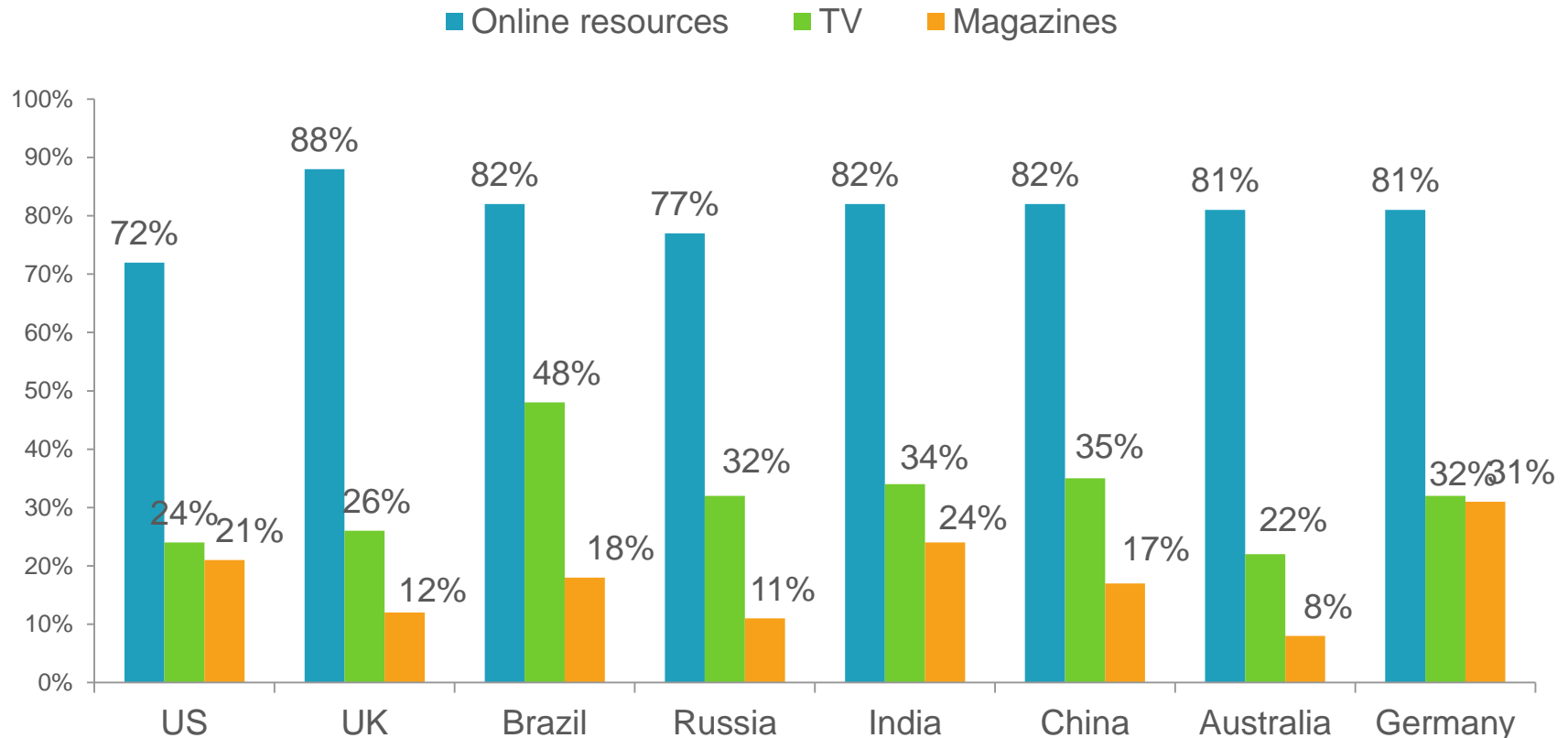


Digital is Essential in Her Life

Online is the major connection to parenting information

Q:

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



Source: BabyCenter 21st Century Mom™ Insights Series, Global Media Mom Report, 2012.
Online NET includes search, parenting sites, social media, online videos, mom blogs, and "other online sources".

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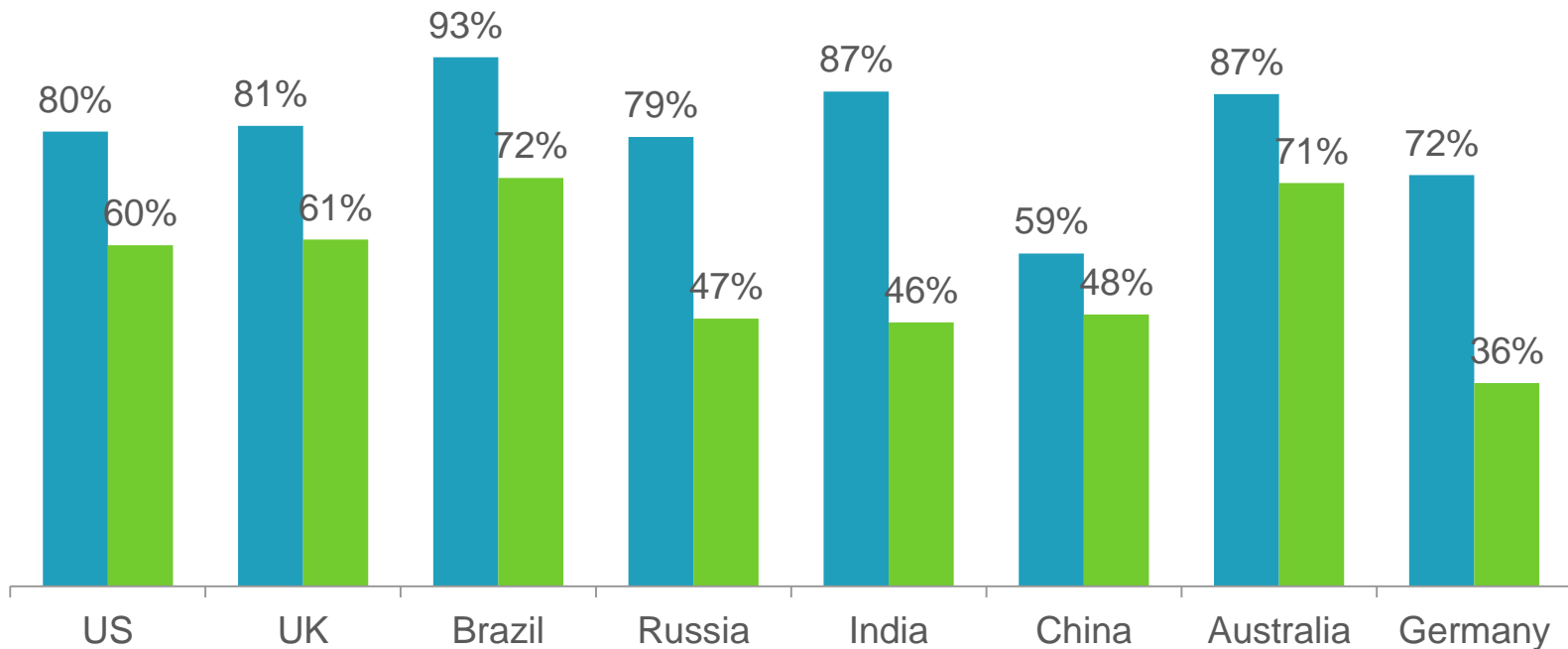
Social keeps her connected to friends & brands

Q:

Do you use social media (e.g., Facebook, BabyCenter Community, Renren, Baidu) **regularly?**
Do you like any brands or companies on Facebook (CN: Renren) **or follow any on Twitter** (CN: Baidu)?

■ % who use social media regularly

■ % who "like" or "follow" brands

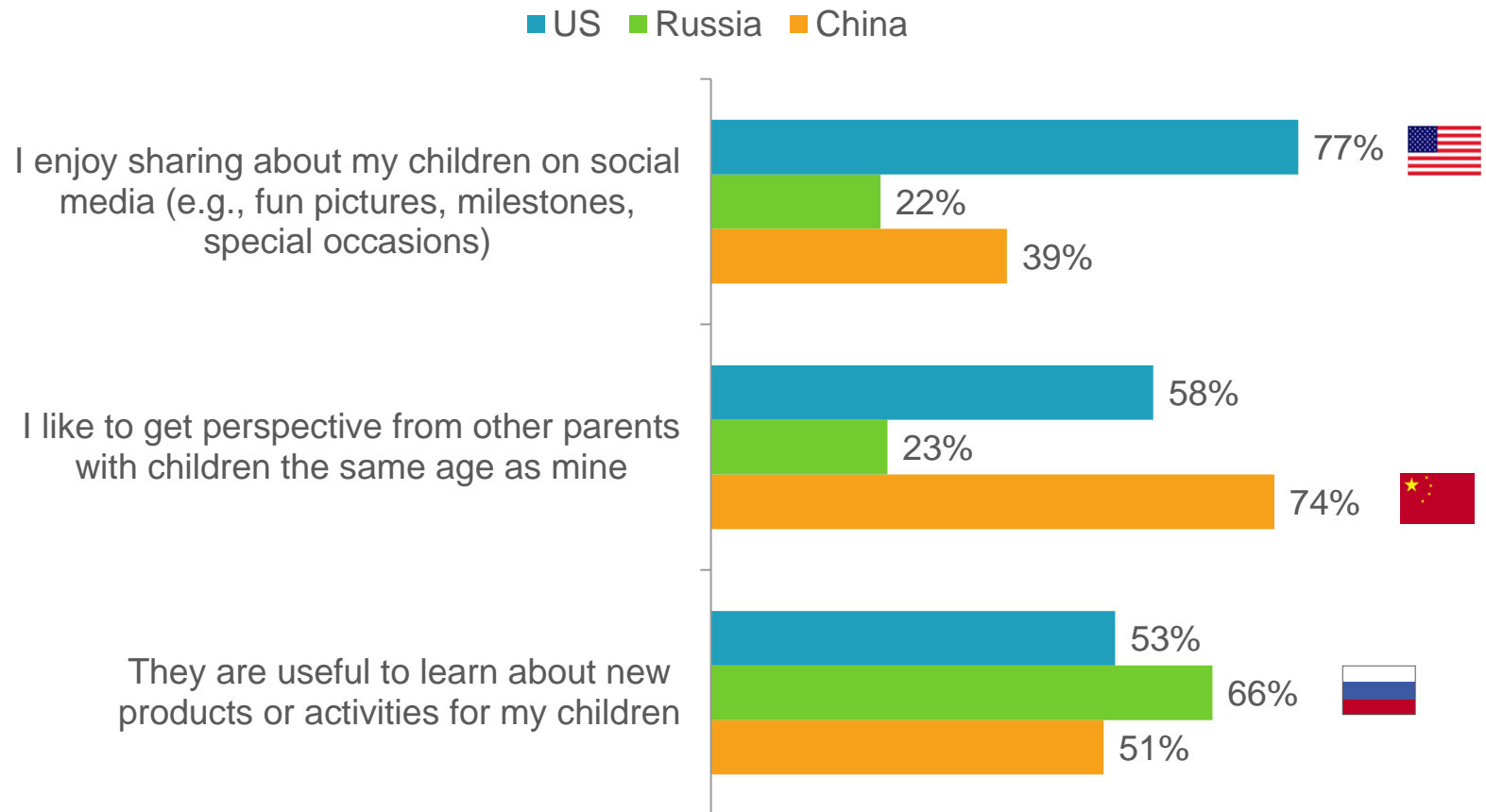


Parenting makes her more social, though reasons why vary by country



Q:

How has the way you use social media/community sites changed since becoming a parent?



Mobile gives Mom superpowers globally

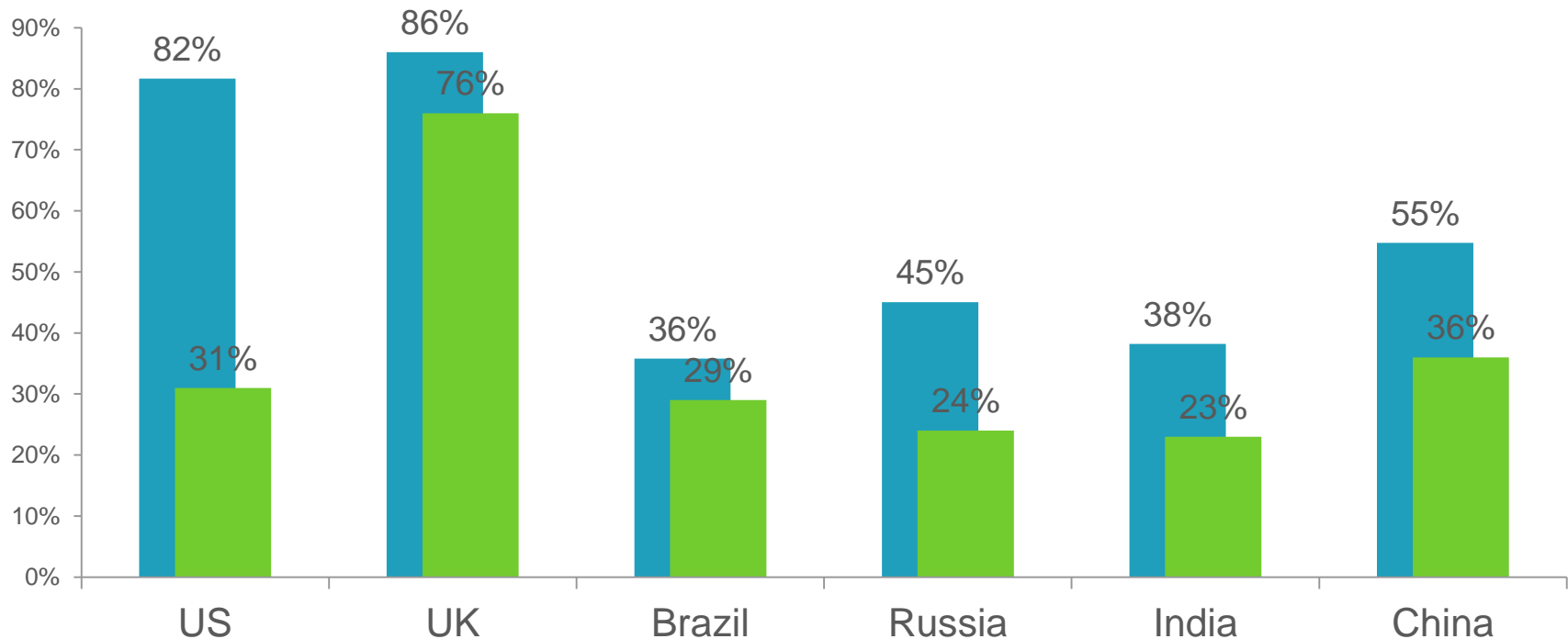
In the UK it is primary mode for search

Q:

Which of the following have you done in the past 30 days with your smartphone or tablet? Do you use search engines as often on your smartphone as on your computer? (among device owners)

■ % who searched on their smartphone in the past 30 days

■ % who use search engines as often on their smartphone as on their computer



A hand holding a smartphone, with a grid pattern overlaying the entire image. A blue banner is positioned across the middle of the image.

Media Mom is in Control

MediaMOM

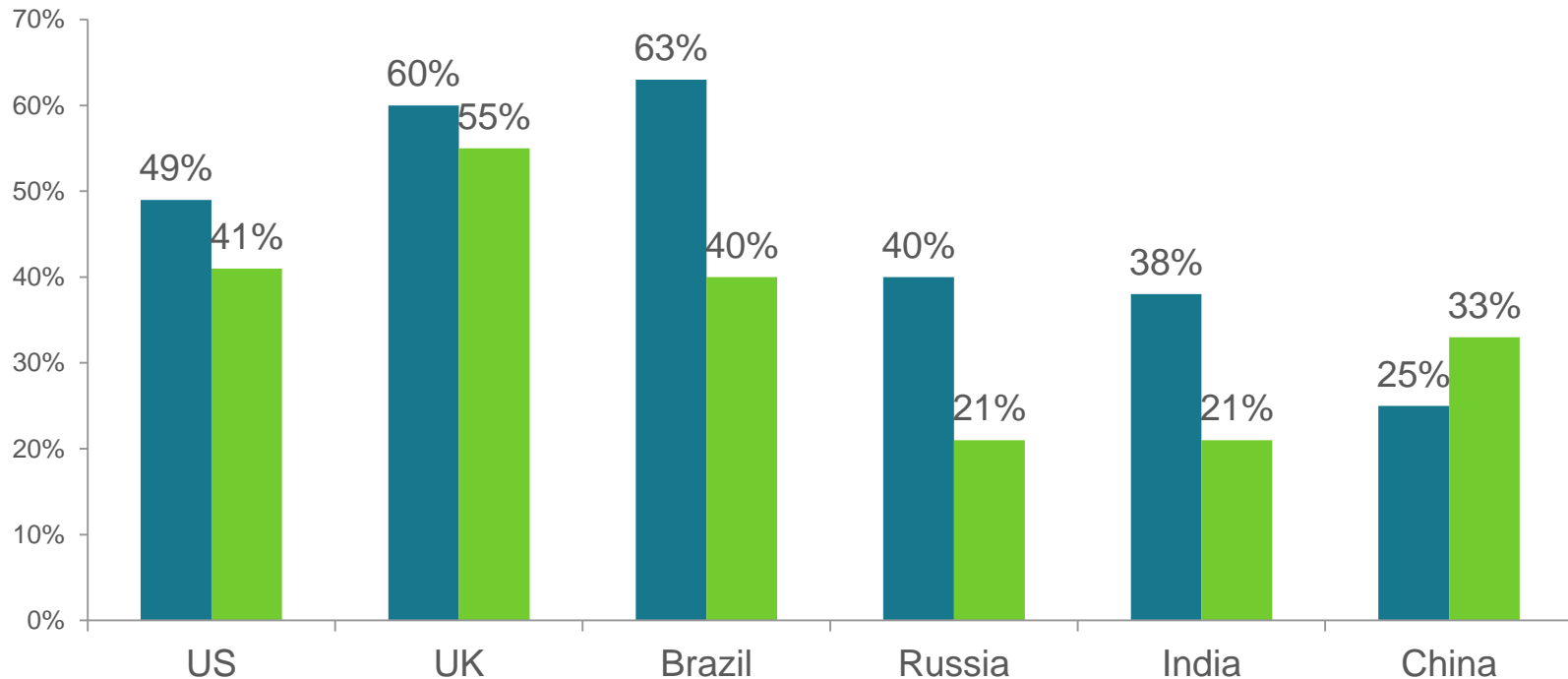
Every moment matters

Mom multitasks to maximize her media time

Q:

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

■ % who use social media while watching TV
■ % who go online via mobile device while watching TV

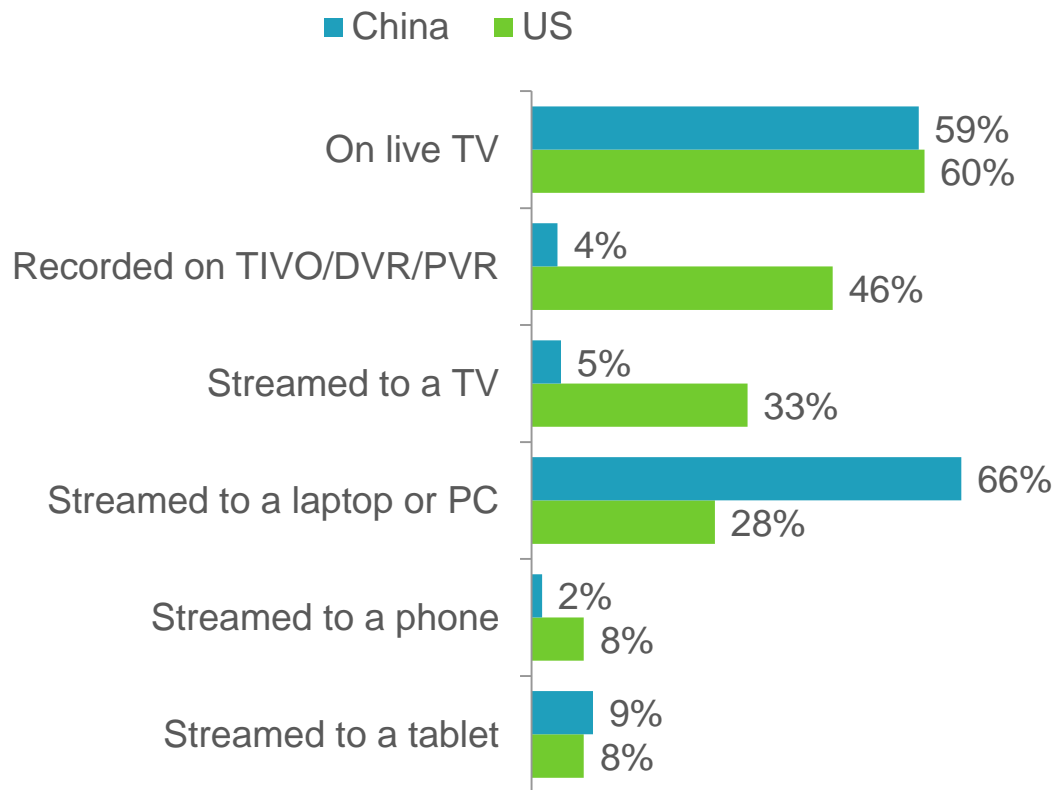


Globally, she gets it on her own terms



Q:

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



Fast Facts

In China, high definition movies/new TV shows are widely available online for free download or streaming



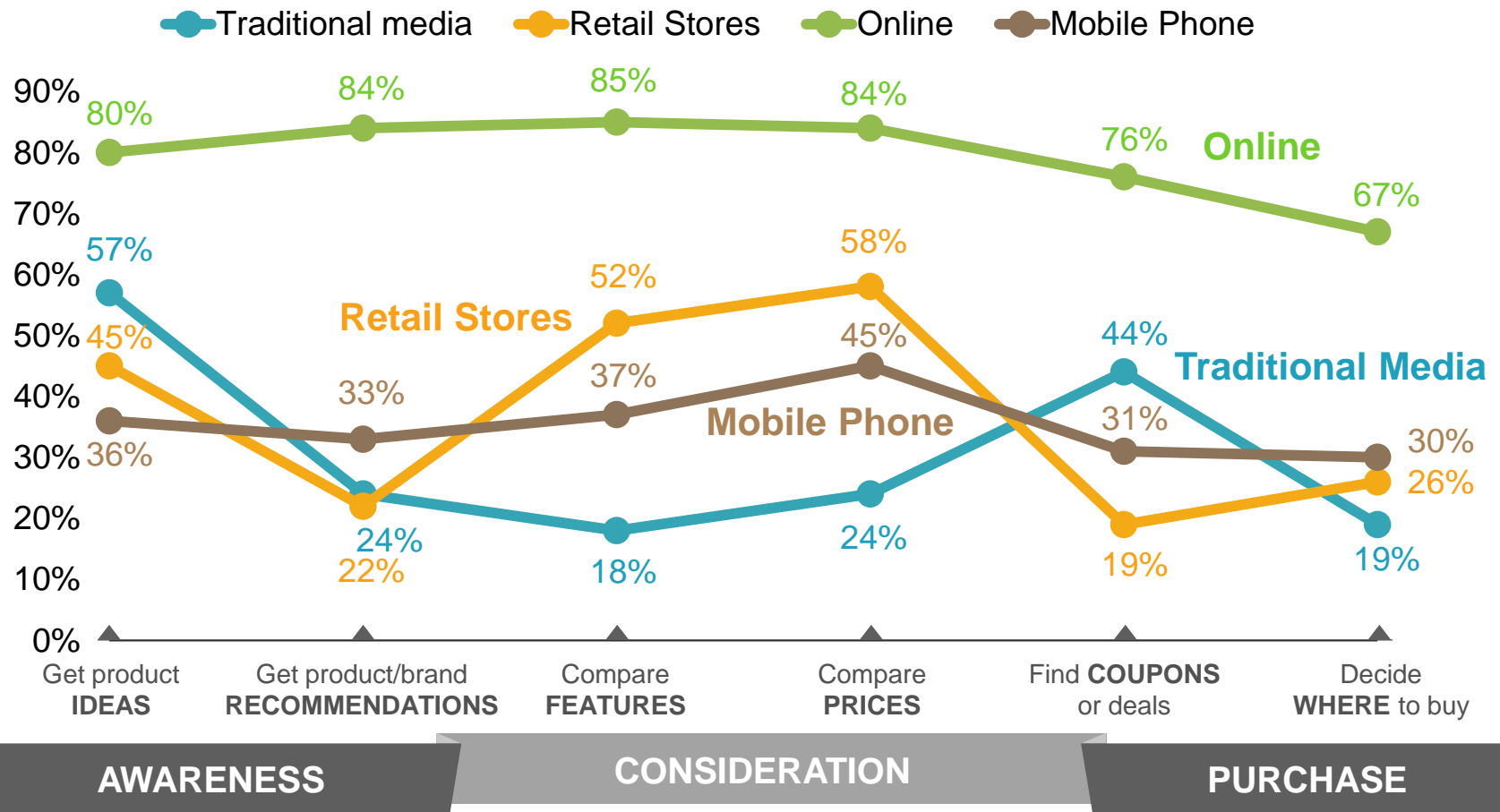
Her Path to Purchase Has Evolved

In the US, online is critical in the purchase process



Q:

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

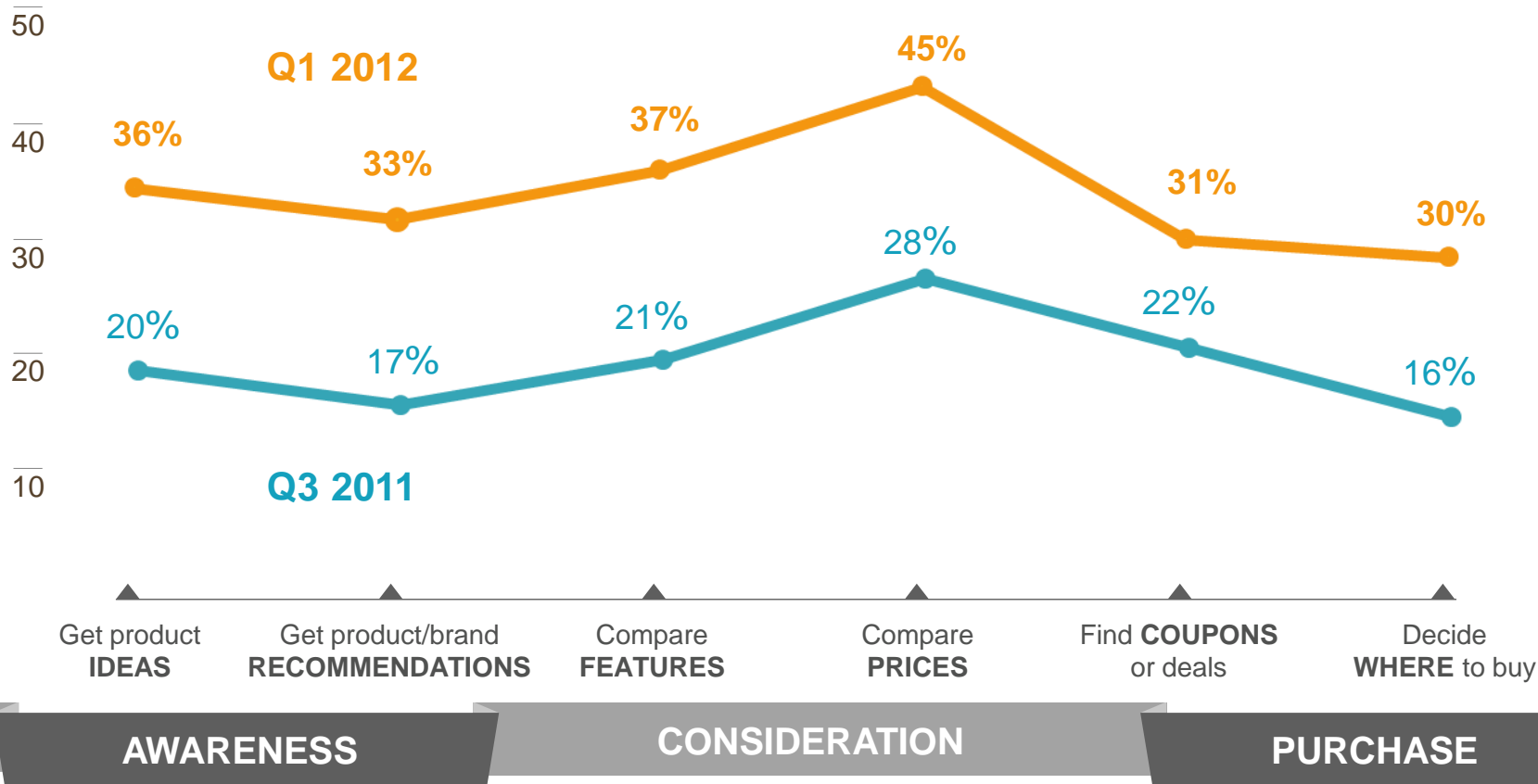


Reliance on mobile is increasing dramatically



Q:

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



Source: BabyCenter 21st Century Mom® Insight Series

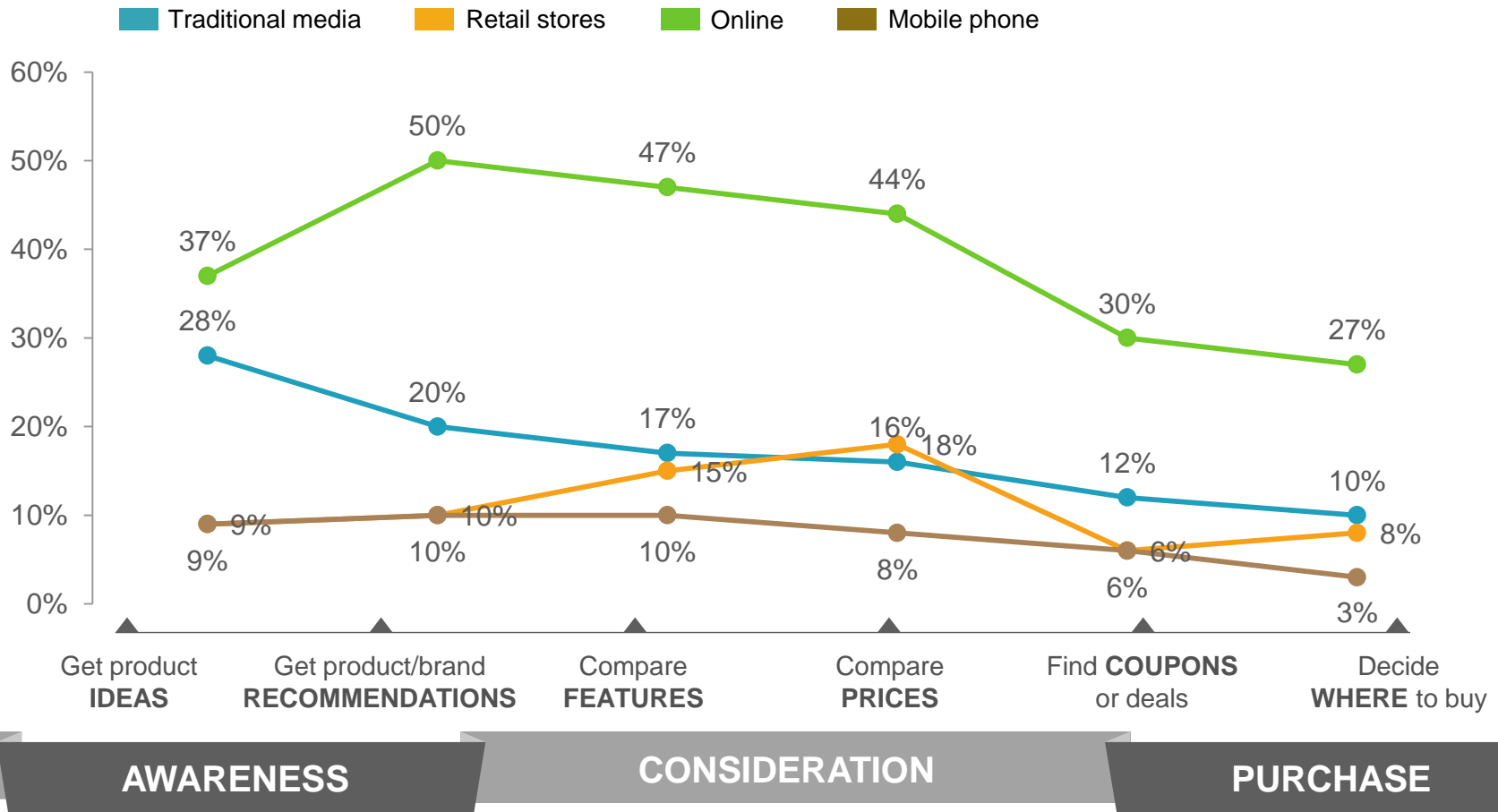


Digital has the same strength in China



Q:

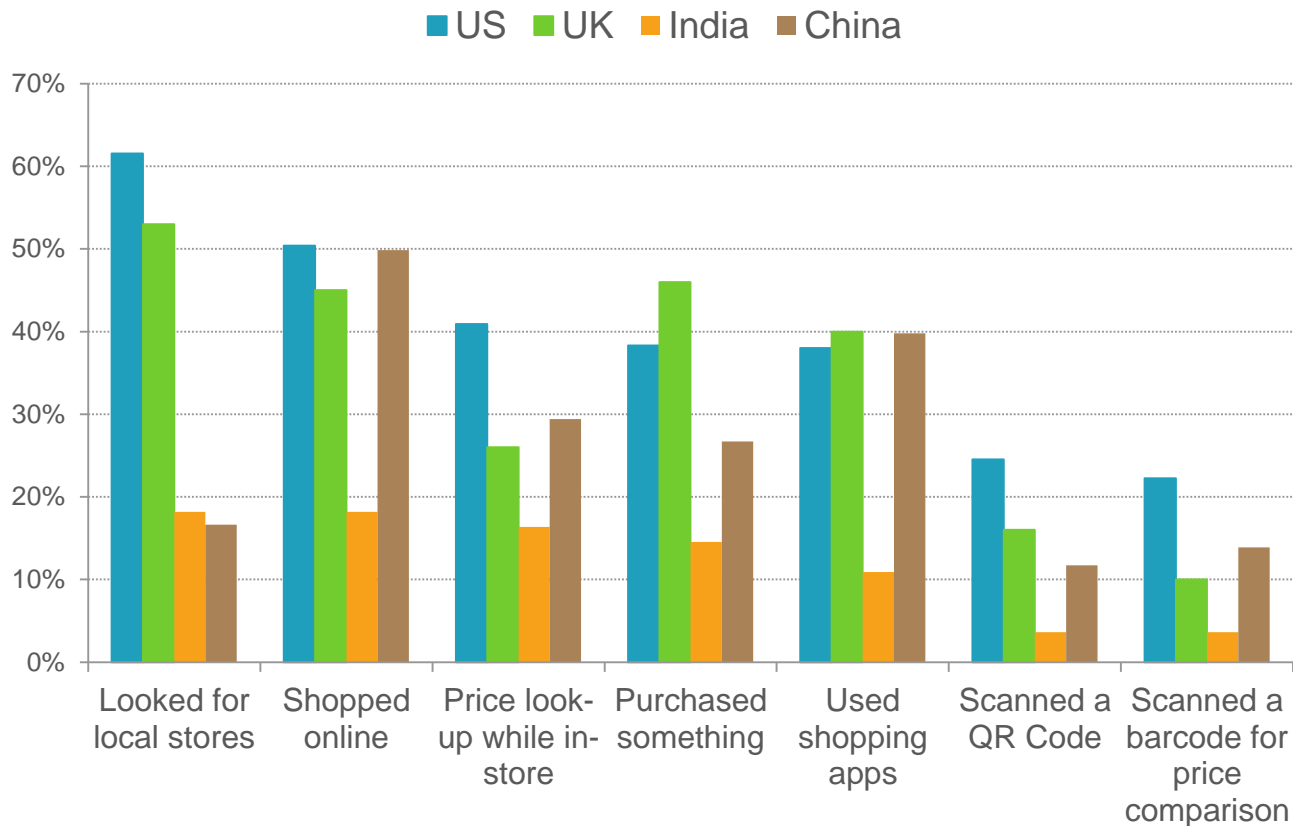
Imagine you are going to buy a new product. How would use each of these resources throughout the shopping process?



Mobile as shopping sidekick

Q:

Which of the following have you done in the past 30 days with your smartphone or tablet? (among device owners)



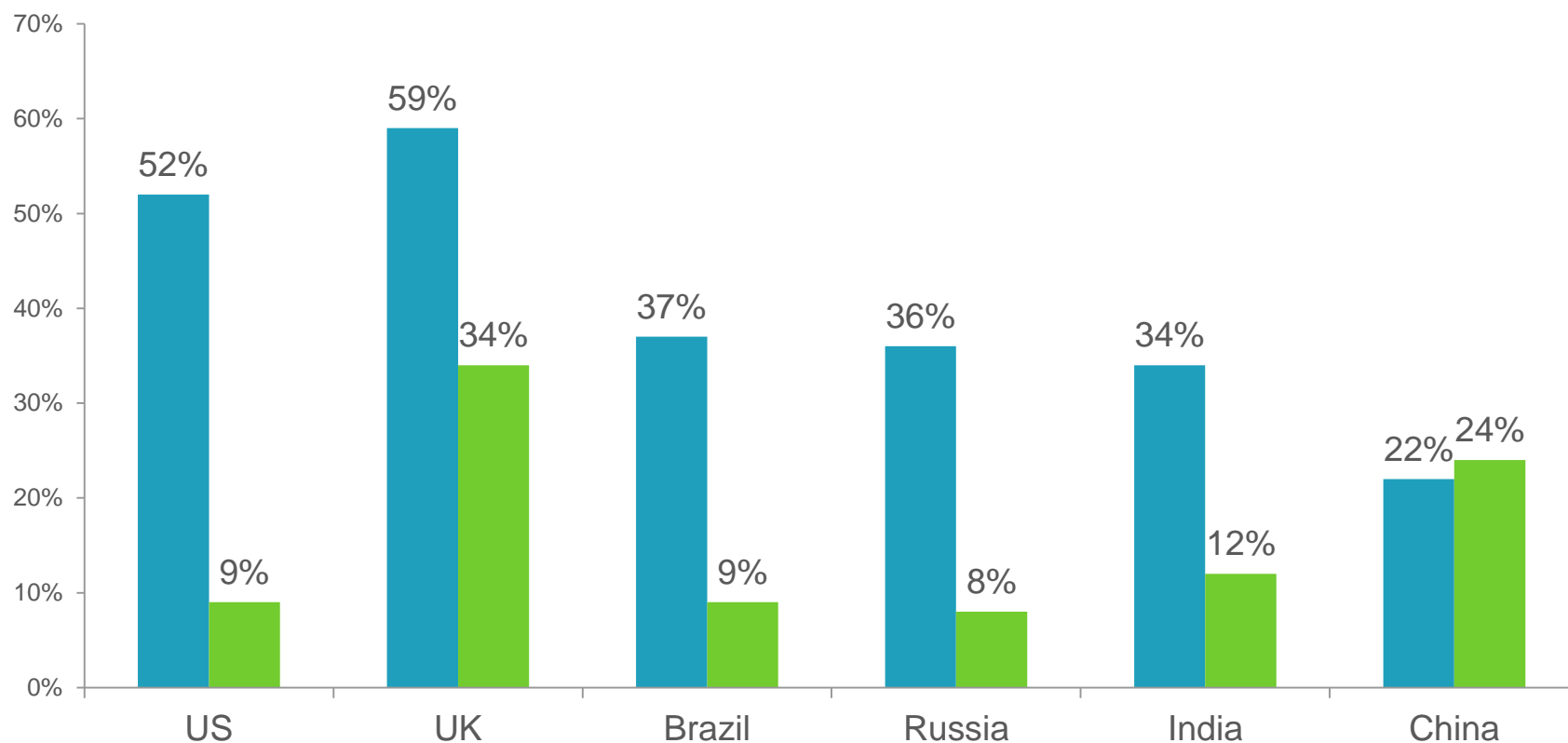
Fast Facts

Chinese Moms are **2X** more likely to shop on their phones compared to Indian Moms.

US Moms are **39%** more likely to look up prices while in-store, than Chinese Moms.

Moms know about QR codes though they don't necessarily scan them

- I have seen this before in stores, magazines, on product packaging, etc.
- I have scanned this type of code before



A man in a dark suit and light blue shirt stands in an office, gesturing with his right hand. In the background, a woman with dark hair is seated at a desk, looking towards the camera. The office has a bookshelf and a lamp.

Media Mom is Changing the Rules for Marketers

MediaMOM

Her media choices demand attention

MOBILE

Emerging markets are mobile first, with moms included

ONLINE

Spending more time online since becoming moms.

TELEVISION

63% of Brazilian Moms multitask with social media while watching television.

SOCIAL

87% of Indian Moms use social media regularly

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

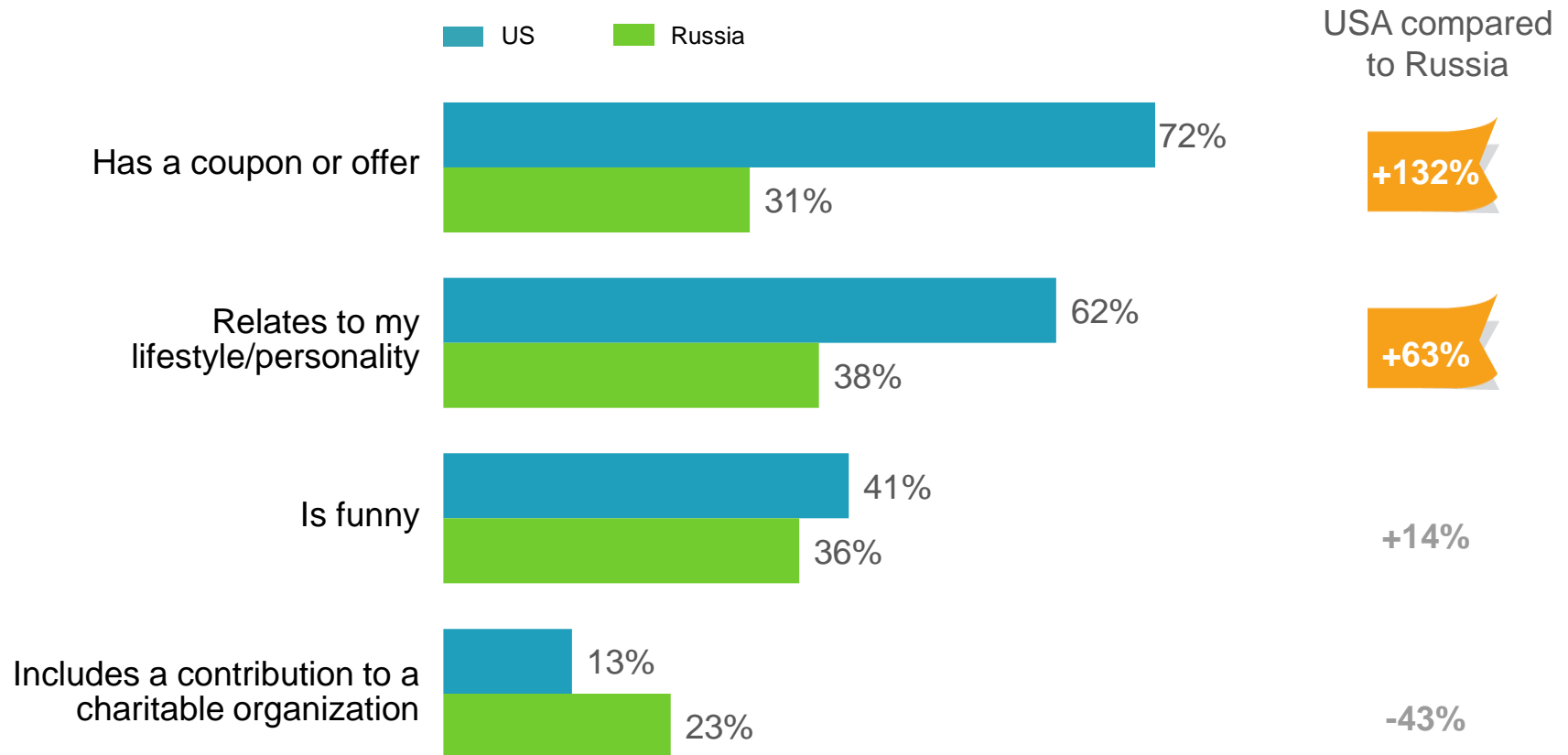
Scanners, comparative shopping, social networks, reviews, WOM – **how are you fitting into her new shopping behaviors?**

Moms expect more from advertising



Q:

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



Source: BabyCenter 21st Century Mom™ Insights Series, Media Mom Report, April 2012.

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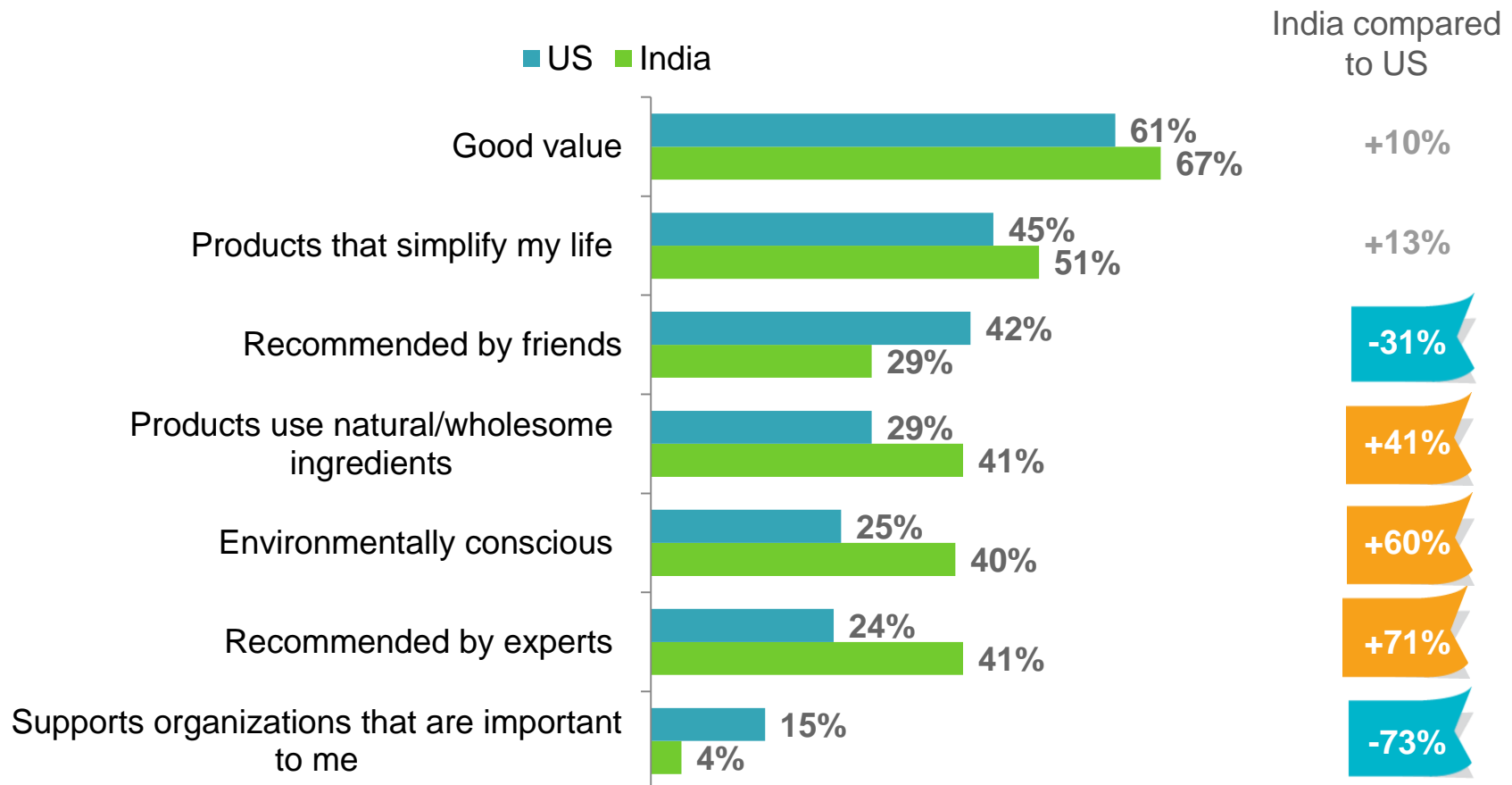


Moms expect more from brands



Q:

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



Source: BabyCenter 21st Century Mom™ Insights Series, Media Mom Report, April 2012.

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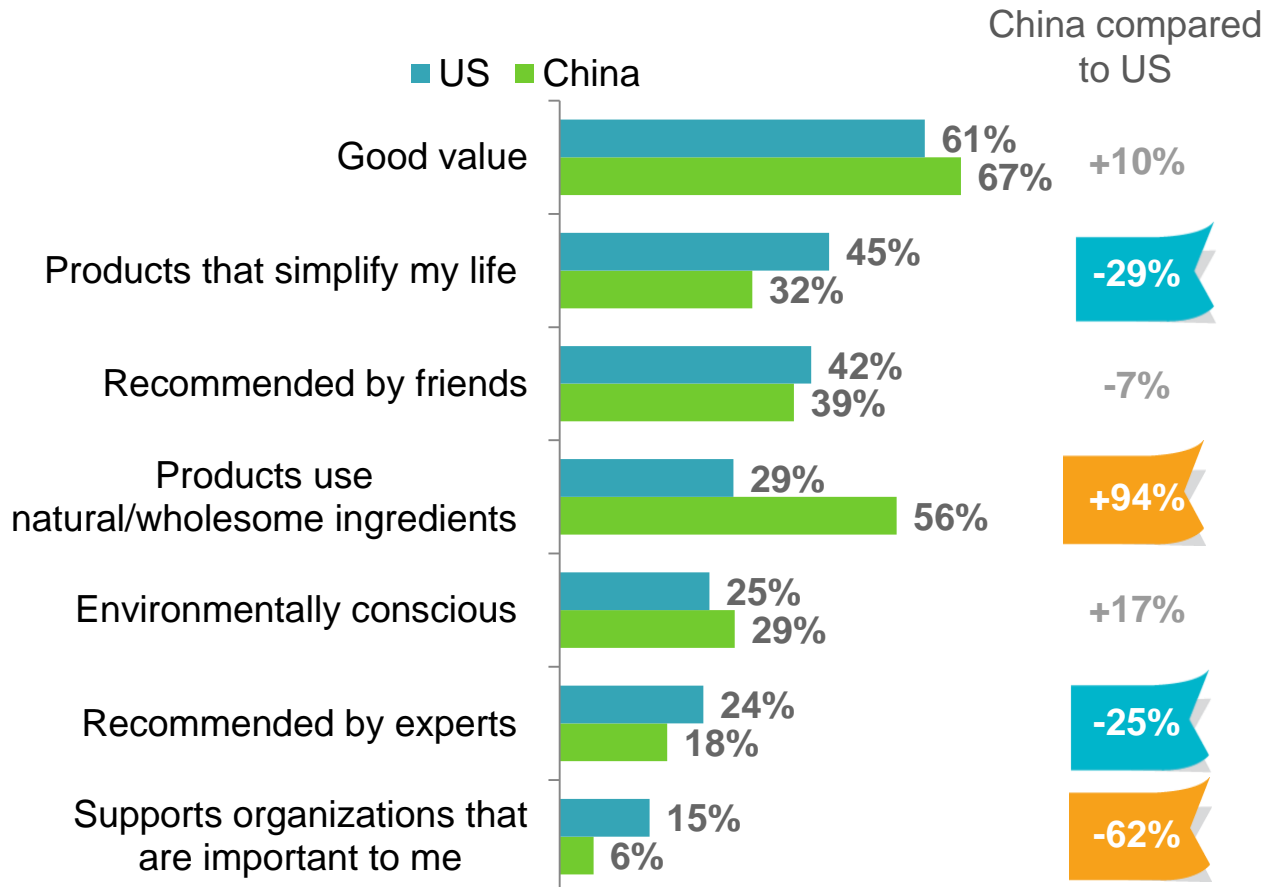


Moms expect more from brands



Q:

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



Fast Facts

Product safety is **one of top two** characteristics that Chinese Moms look into when choose a brand (**67%**).

Many Chinese Moms **ONLY** buy imported formula for babies, or only order from a foreign distributor.

The new rules for marketing to global 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? Please contact us.

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