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The Four Truths About Moms and Search

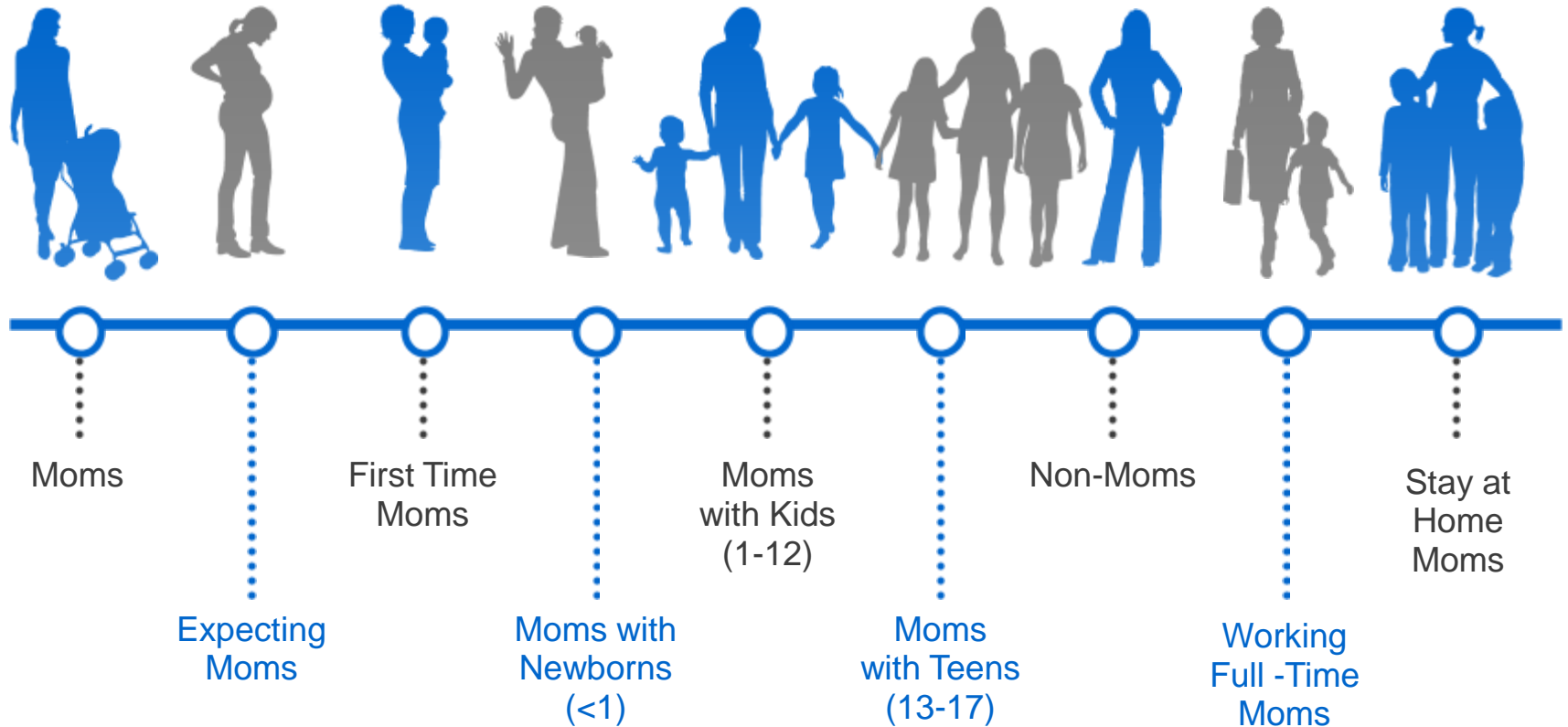
Google, OTX, BabyCenter Custom Moms Study
U.S., 2009



Study Objectives

- Understand the search usage patterns of moms as it relates to family household decision making
- Assess differences in search patterns across the different types of moms
- Understand the motivations and emotional attachments moms have to search
- Determine the factors that trigger moms to click
- Understand the role search plays in the purchase funnel

Study Methodology



Partner: BabyCenter

Research Vendors: OTX Research, Sterling Brands

Study Dates: October 16th to November 17th

Sample Sizes: 45 Moms in online bulletin boards; 4,186 Moms for online survey; 600 Moms in BabyCenter Panel

The Four Truths About Moms and Search

- 1** The Stork Delivers Search
- 2** Moms Become Black Belts in Search
- 3** Search is Mom's GPS to Store
- 4** Search is Mom's Back Up Brain

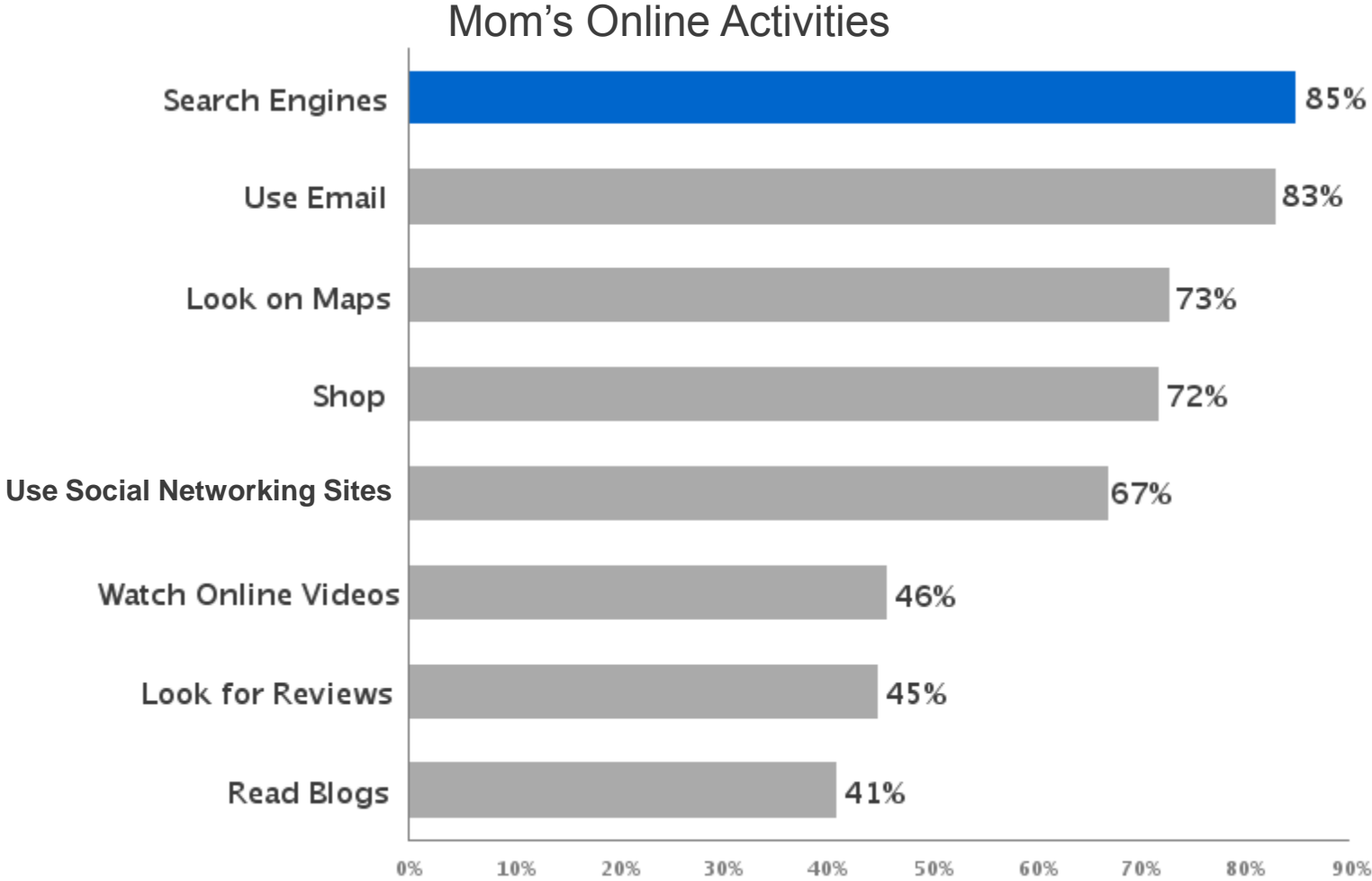
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The Stork Delivers Search

Truth 1 of 4

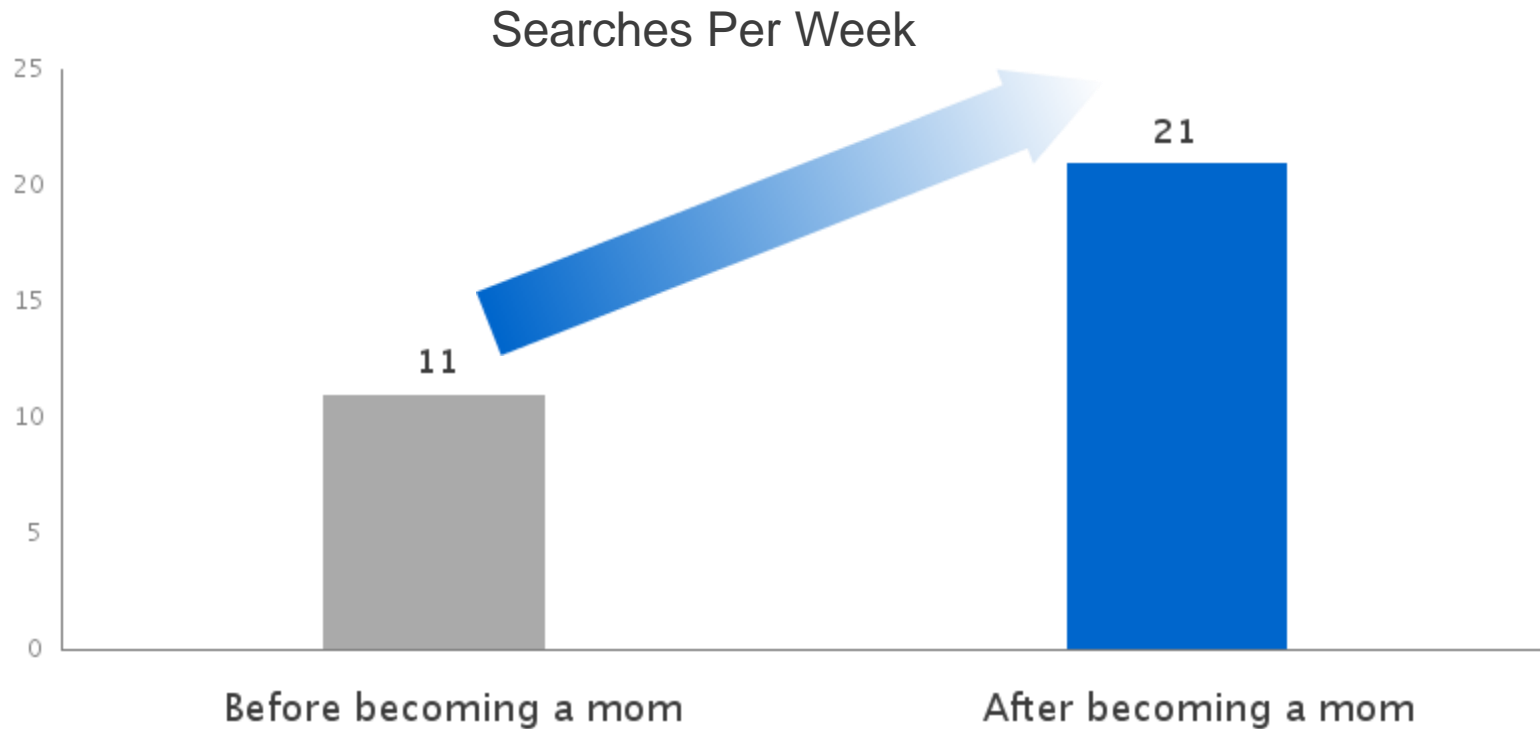


Moms Search More Than Any Other Online Activity



Q: Which of the following do you do online? (Base: Average Mom N=402)
Source: Google BabyCenter OTX Moms Survey, November 2009

Search Activity Doubles After Becoming a Mom



Q: Thinking back to before you had children/became an expecting parent, in an average week how many online searches using a search engine (like Bing, Yahoo! Or Google) did you conduct? (General Search Engine Users who are Moms)

Q: Thinking about your life as a parent/expecting parent, in an average week, about how many online searches using a search engine (like Bing, Yahoo! Or Google) do you conduct? (General Search Engine Users)
(Base: Average Mom, General Search Engine Users 395)

Source: Google BabyCenter OTX Moms Survey, November 2009

As the Net Grows...Search Becomes More Addictive

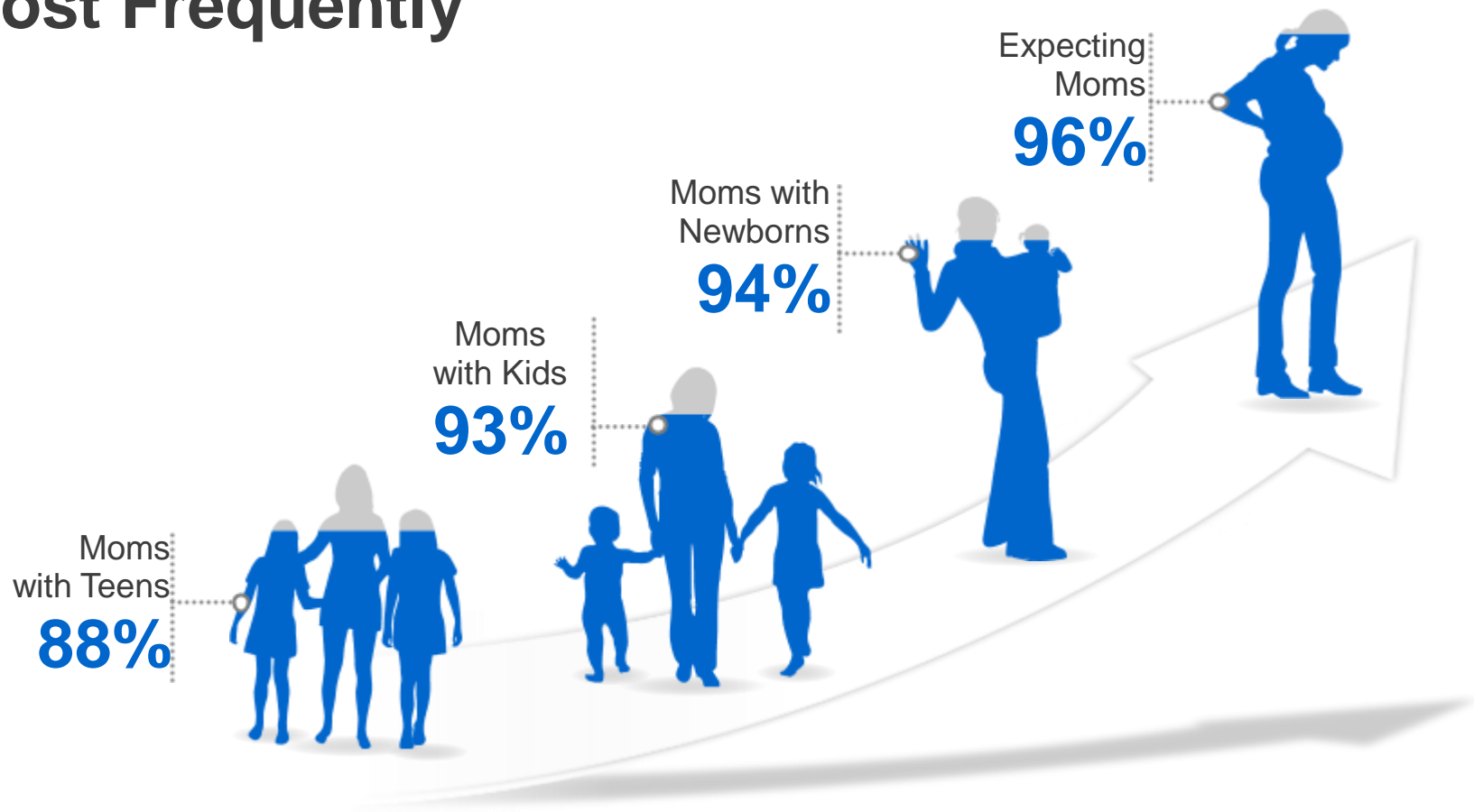
“I rely more now on online searches. This has definitely changed over the past few years - especially since I have gained more parenting experience myself and the **sheer number of ‘stuff’** that is out there on the 'net is growing each day.”

“Yes, I'm searching for more health info because, well, there is more available - plus **it's almost addictive**. Once you find something helpful you begin to ask more and more...”



Source: Google Sterling Moms Qualitative Study, Nov 2009

Expecting Moms and Working Moms Search the Most Frequently



% of Moms Who Use Search Engines Frequently

Q: How often do you use search engines such as Google, Yahoo!, etc. to search for information online. Top 2 Box Regularly/Frequently

(Base: Moms with teens=400, Moms with kids=475, Moms with newborns=426, Expecting moms=453)

Source: Google BabyCenter OTX Moms Survey, November 2009

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Moms Become Black Belts in Search

Truth 2 of 4



Today's Moms Have Mastered Search

“Search engines give you the **biggest bang for your time**. They lead you to resources that you may not even know were out there.”

“Online resources enable me to QUICKLY get info from a variety of sources. In some ways, perhaps it was easier to not be so involved - research takes work and time. For me **it is not about easier, its about BETTER.**”

3 out of 4

feel like they have gotten better at searching

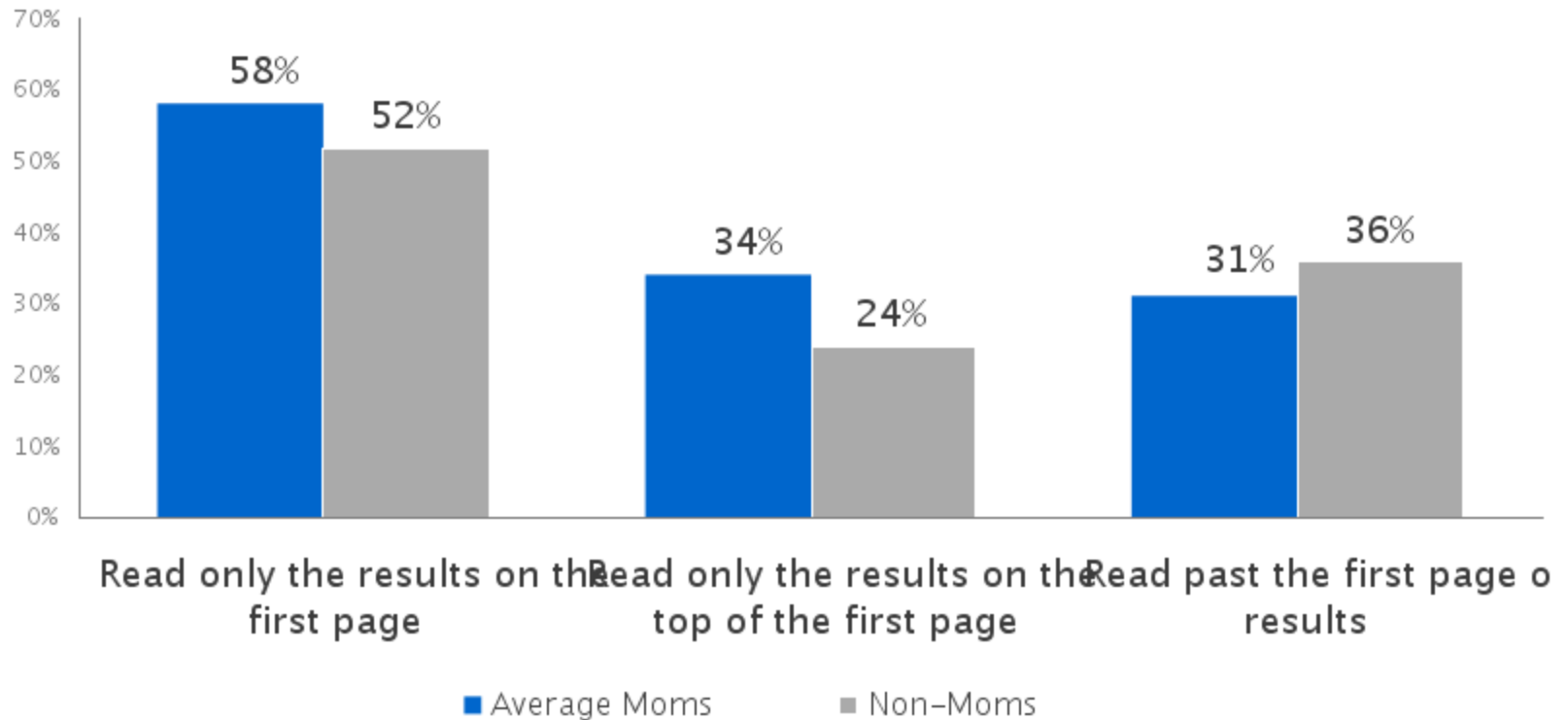


Q: Please indicate how much you agree or disagree with the following statements – Top 2 Box. "I feel like I have gotten better at searching than in the past" (Base: Average Moms 402)

Source: Google BabyCenter OTX Moms Survey, November 2009, Google Sterling Moms Qualitative Study, Nov 2009

More Than 1/3 of Moms Never Make It Past the First Page

Where Moms Read Search Engine Results



Q: When reviewing search results, how often do you do the following? (Top 2 Box Always/Frequently)
(Base: Average Moms search engine users n= 395, Non moms search engine users n= 387)

Source: Google BabyCenter OTX Moms Survey, November 2009

Moms Strategically Match Search Queries With Needs

Type of Words and Phrases in Search Query

77%
Specific Words:

i.e. "Leaky Diapers"



52%
Sentence or Phrase

i.e. "How to Deal with Leaky Diapers"

78%

Product or Site Names:

i.e. "Pampers"

Q32. Consumers use search engines differently. Using the scale below, please tell us how much you agree or disagree with the following [illustrated] about online search engines (Top 2 Box) (Base: Average Moms, search engine users 395)

Source: Google BabyCenter OTX Moms Survey, November 2009

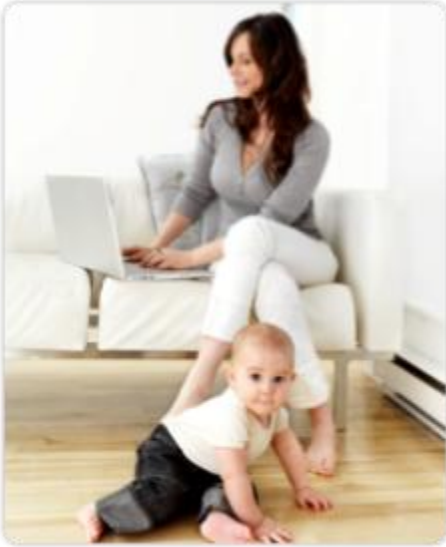
Moms Shift from Using Words to Phrases

“Up until recently, I used one or two words, but lately I find I can actually put a full sentence question in them and the results sometimes can be very surprising - zoning in more to the exact nature of my questions.”



Search is Successful for Moms

“I guess it's the confidence of knowing I can find what I'm looking for. I have gained a reputation of finding almost any information or item online that friends and family ask me for help with. They call me ‘**Google Ninja.**’”



90%

of the time, Moms successfully find what they are looking for with search

Q: Thinking about all times you visit search engines to get information, what percent of the time are you successful in finding the information you are searching for?

Base: Average Moms, search engine users n = 395

Source: Google BabyCenter OTX Moms Survey, November 2009, Google Sterling Moms Qualitative Study, Nov 2009

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Search is Mom's GPS to Store

Truth 3 of 4



Moms Search Across the Purchase Funnel



Stage of Search Engine Usage
Across Purchase Funnel

	Average Moms	Expecting	Moms w/Teens
Awareness	52%	50%	47%
Familiarity	50%	51%	52%
Consideration	50%	56%	52%
Selection	35%	38%	38%
Loyalty	22%	30%	30%

Q: Thinking about the purchase process, at what stage do you use each online source listed below?

(Base: Use Search Engines. Average Mom=223, Expecting Mom=260, Moms with Teens=224)

Source: Google BabyCenter OTX Moms Survey, November 2009

TV Exposure Prompts Search Usage



83% of Moms search on a product after being exposed to a TV ad

Q: Have you ever seen a new brand or product advertised on TV, and then searched for more information on it later using an online search engine? (N =721)

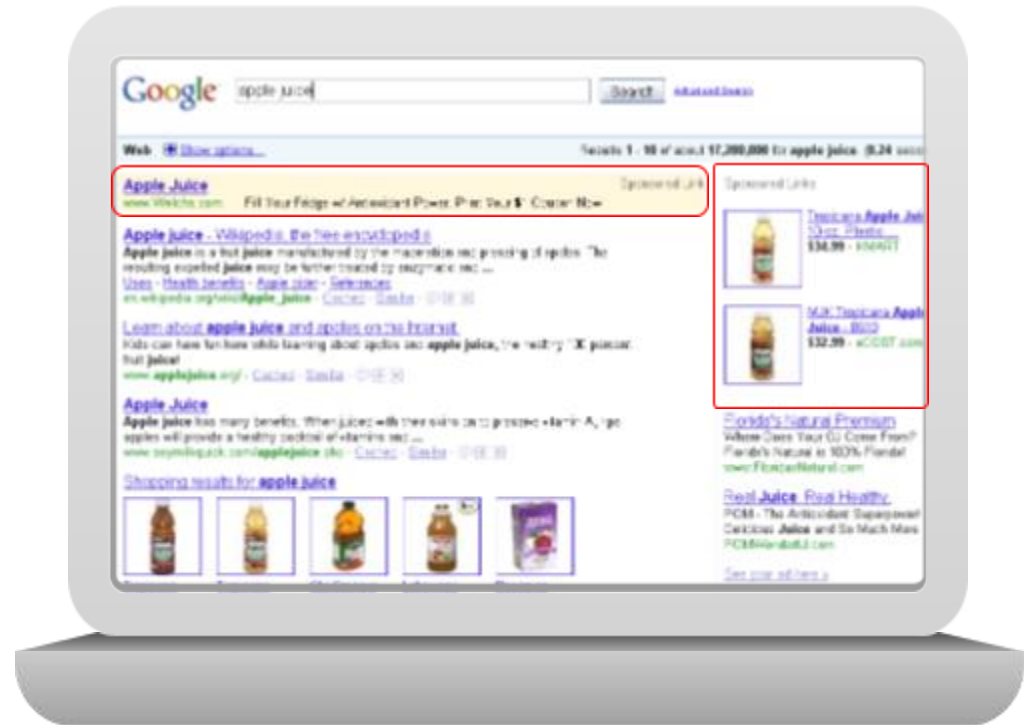
Source: BabyCenter Study on Google Search, Nov 2009



Rank Matters to Moms

50% of moms expect to see well known brands highlighted with a sponsored link

75% of moms say location/rank aids their decision to click (vs.67% of non-moms)



Q: Which of the following helps in your decision to click on a search result which is either a sponsored/paid or a natural listing? (Base: Average Moms, search engine users n = 395)

Source: Google BabyCenter OTX Moms Survey, November 2009

Q: Please indicate how much you agree or disagree with these statements (illustrated) . (N = 623)

Source: BabyCenter Study on Google Search, Nov 2009



Search Engines Drive Coupon Discovery



Method of Finding Coupons	Expecting Moms	Working Moms	Stay-at-Home Moms
Use a search engine	50%	50%	55%
Visiting manufacturer's websites by typing their URLs	33%	34%	46%
Mail	45%	39%	45%
Click on links or print out a forwarded coupon	30%	31%	33%
Newspaper	32%	36%	30%

Q: How do you typically learn about or find online coupons that might be of interest to you?
 (Base: Obtain online coupons. Expecting Moms=390, Working Moms=354, Stay at Home Moms=328)

Source: Google BabyCenter OTX Moms Survey, November 2009

Online Deals Trigger Repeat Purchase Behavior for Moms

“I definitely play the coupon game. I spend a lot of time researching deals and organizing coupons. I also **love using coupons**. I grew up with my Mom using them and now I've taken it to another level.”

7 out of 10

(71%) will buy a brand twice, after trying it once with an online coupon.



Q: Have you ever used an online coupon for a purchase, and then gone back and purchased the same brand again later? (Among those who use coupons, N = 593)

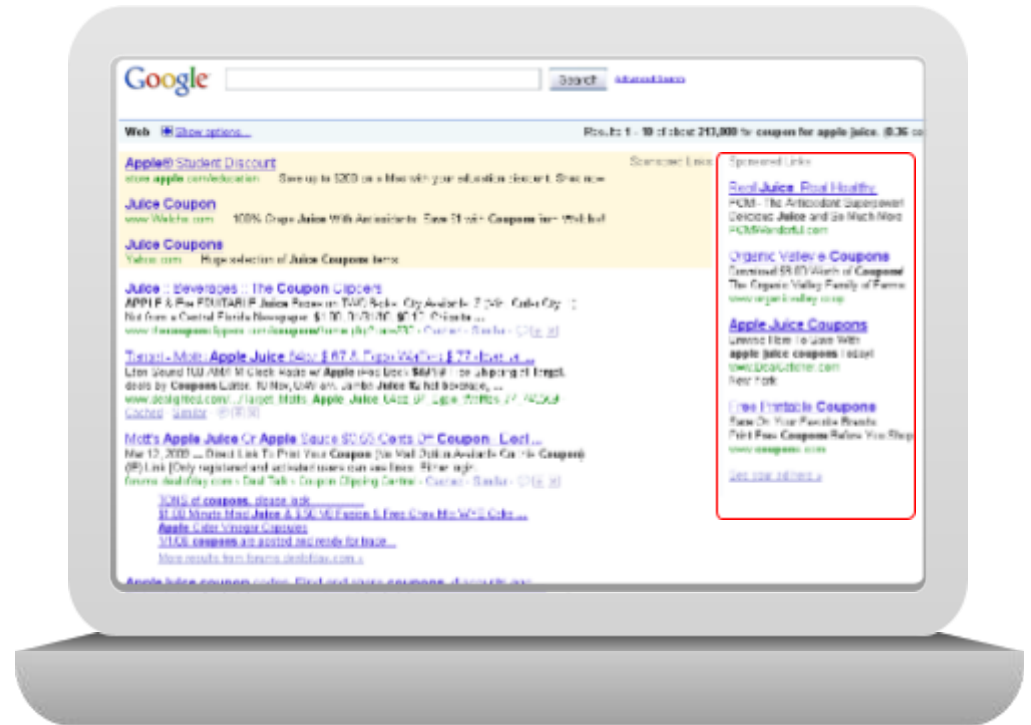
Sources: BabyCenter Study on Google Search, Nov 2009

Google Sterling Moms Qualitative Study, Nov 2009



Sponsored Search Communicates Deals to Moms

59% of moms would click on a needed coupon they see in sponsored search results.



Q: If you saw a coupon on a sponsored search result, for a brand or product you need to buy, what would you do? (Among those who use coupons, N = 573)

Source: BabyCenter Study on Google Search, Nov 2009



Search Helps Mom Arrive at Purchase

Average Moms

55% Visited a store to make a purchase

58% Made a purchase online



Q: As a result of having used a search engine, which of the following actions have you taken?

(Base: Use Search Engines. Average Mom=395)

Source: Google BabyCenter OTX Moms Survey, November 2009

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Search is Mom's Back Up Brain

Truth 4 of 4



Search is an Extension of Mom's Knowledge

68%

of Moms say search engines are like my “backup brain” because they are so easy and comprehensive.

62%

of Moms say search engines allow access to anything, anytime, I tend to delegate things I might normally keep track of myself

57%

of Moms say search engines make it so easy to find nearly anything; allow me to rest and not worry about remembering all the details myself

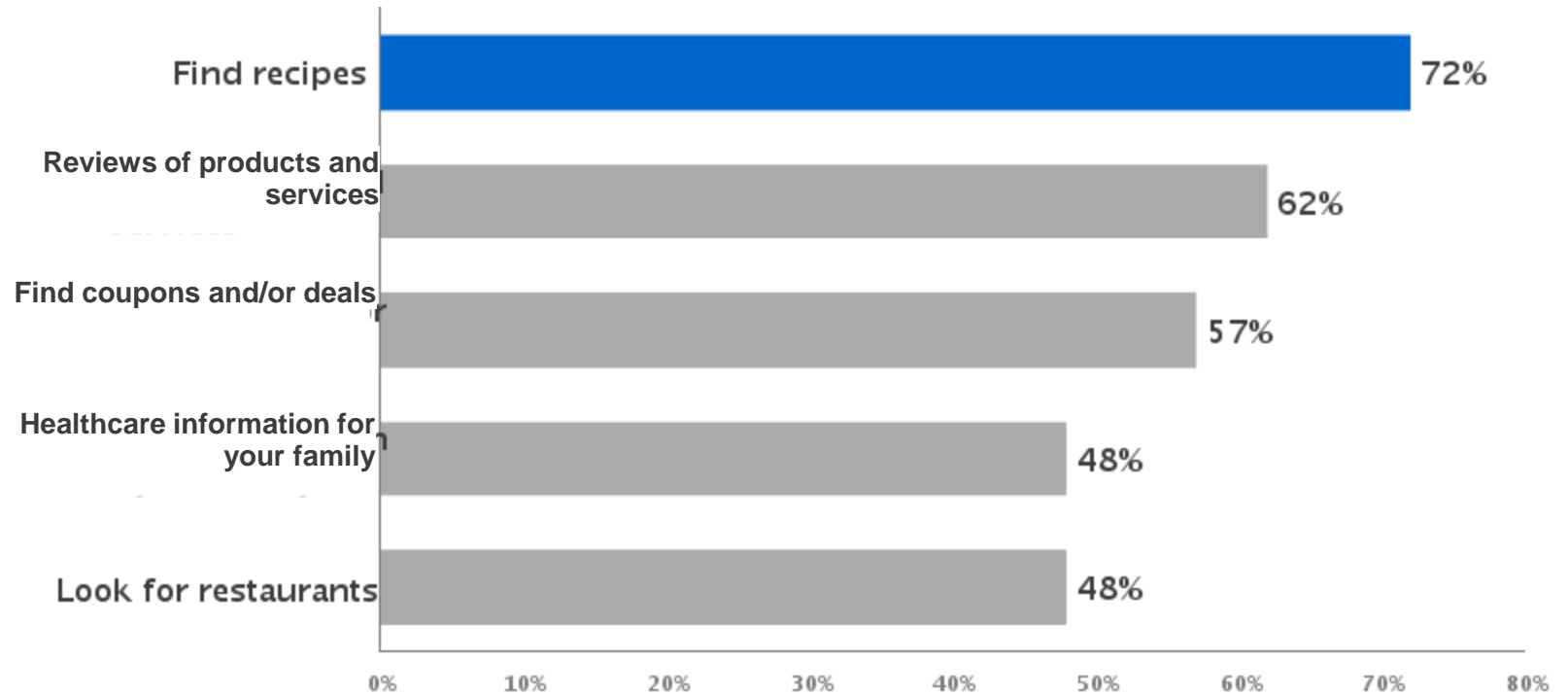
Q: Please rate your agreement with the following statements illustrated.
Top 2 Box, % who strongly agree or agree, (N = 771)

Source: BabyCenter Study on Google Search, Nov 2009



Moms Delegate Activities to Search Engines

Activities Moms Delegate to Search Engines

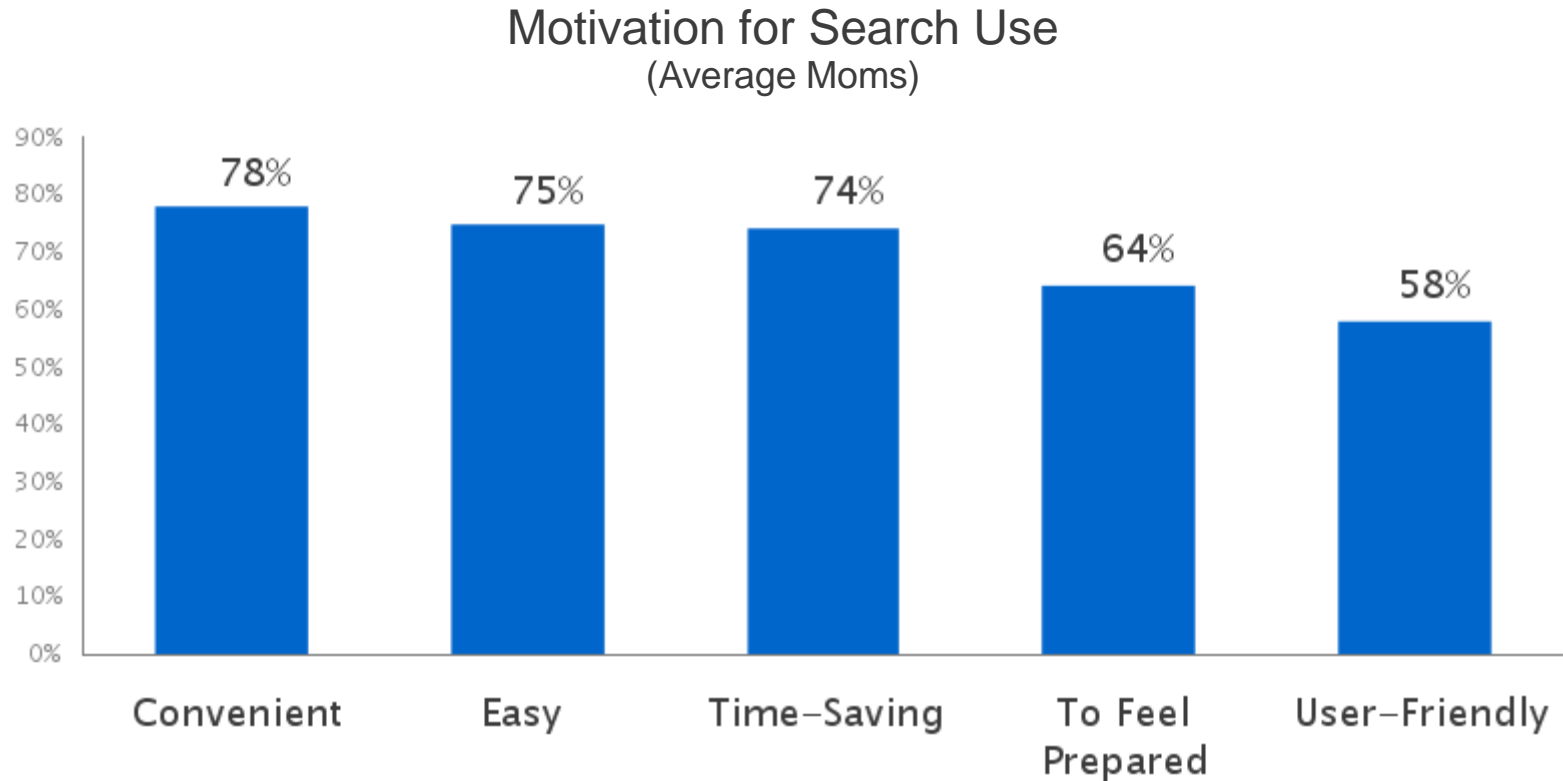


Q: Which of the following tasks do you tend to “delegate” to search engines rather than keeping the information stored in your brain or some other format? (select all that apply) (N = 751)

Source: BabyCenter Study on Google Search, Nov 2009



Moms Use Search for Convenience and Ease



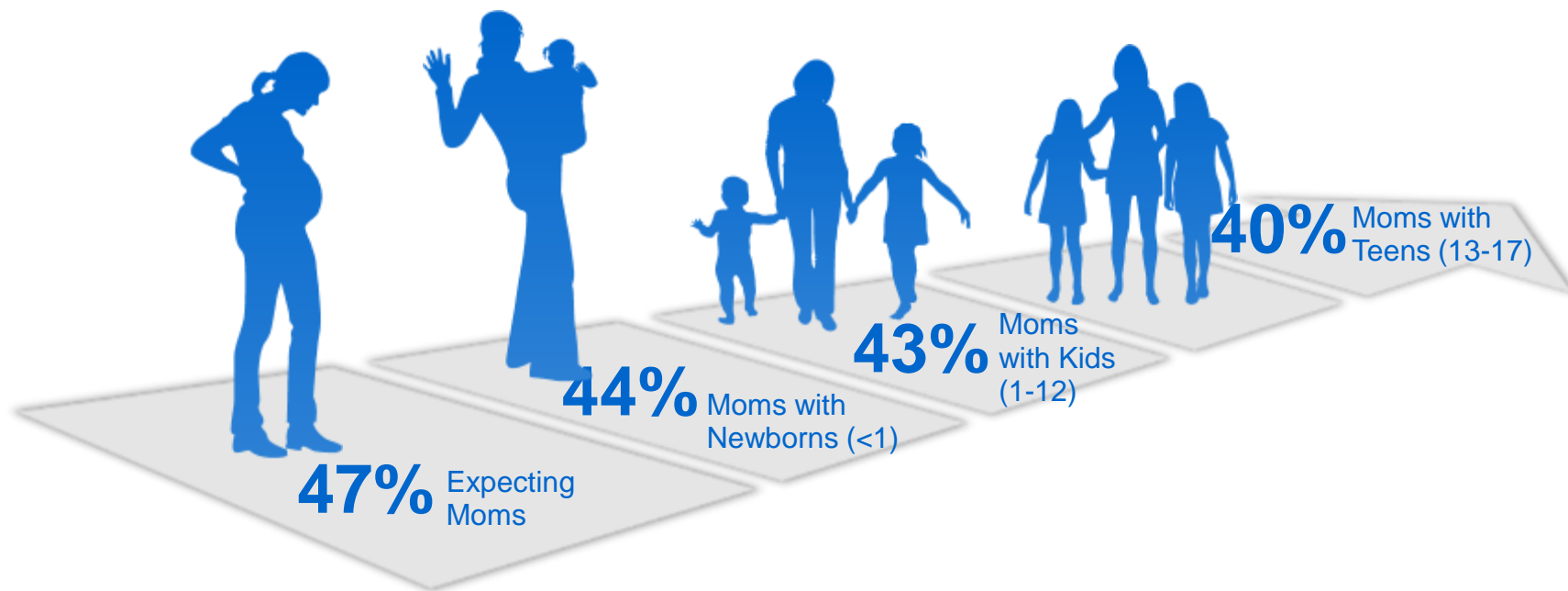
Q: Please complete the following statement explaining why you use search engines to find information for yourself. Please think about any of the search engines you use. Select all that apply.

(Base: Use Search Engines. Average Moms=261)

Source: Google BabyCenter OTX Moms Survey, November 2009

Search Boosts Mom's Confidence in Parenting, Especially at First

% of Moms Who Believe Search Engines Can Help Them Be a Better Parent

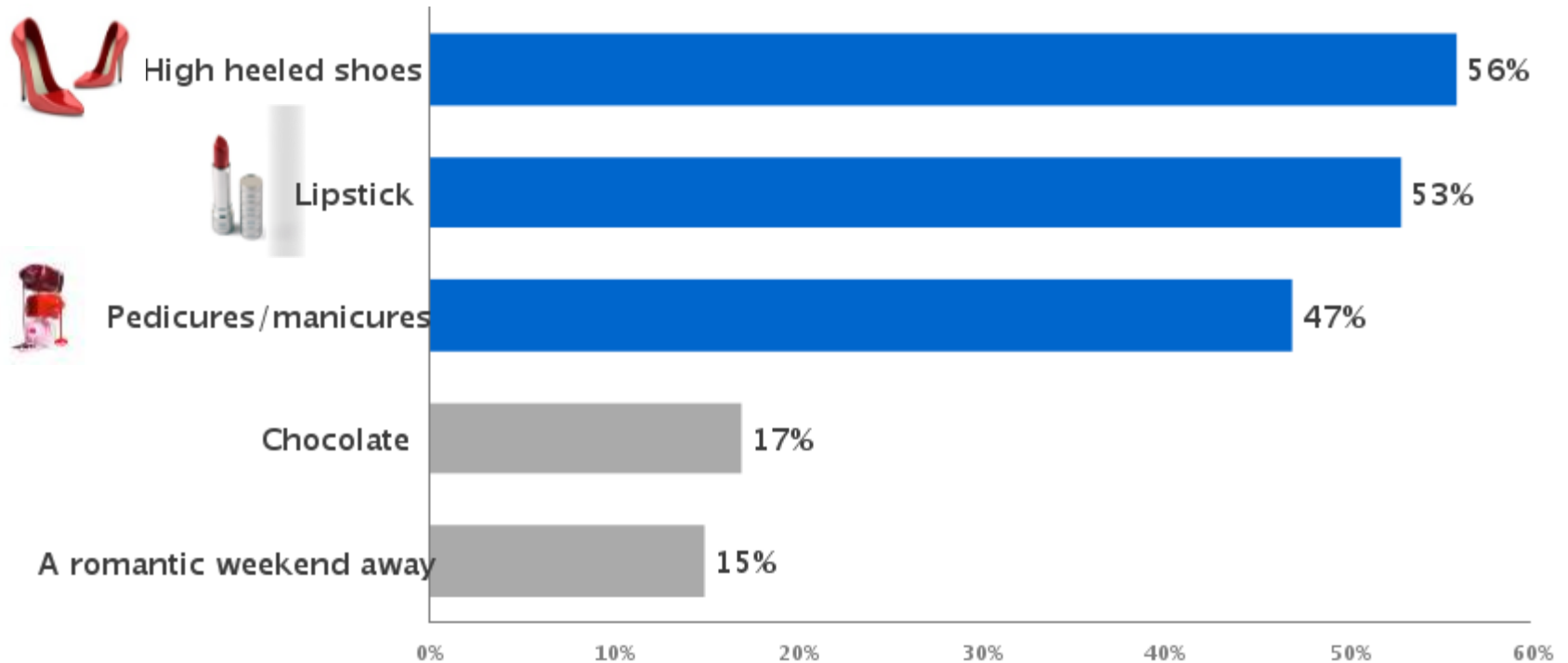


Q: Please indicate how much you agree or disagree with the following statements – Top 2 Box. Search Engines can help me be a better parent.

(Base: Expecting Moms=453, Moms with Newborns=426, Moms with Kids=475, Moms with Teens=400)

Source: Google BabyCenter OTX Moms Survey, November 2009

Moms Give Up High Heeled Shoes for Search



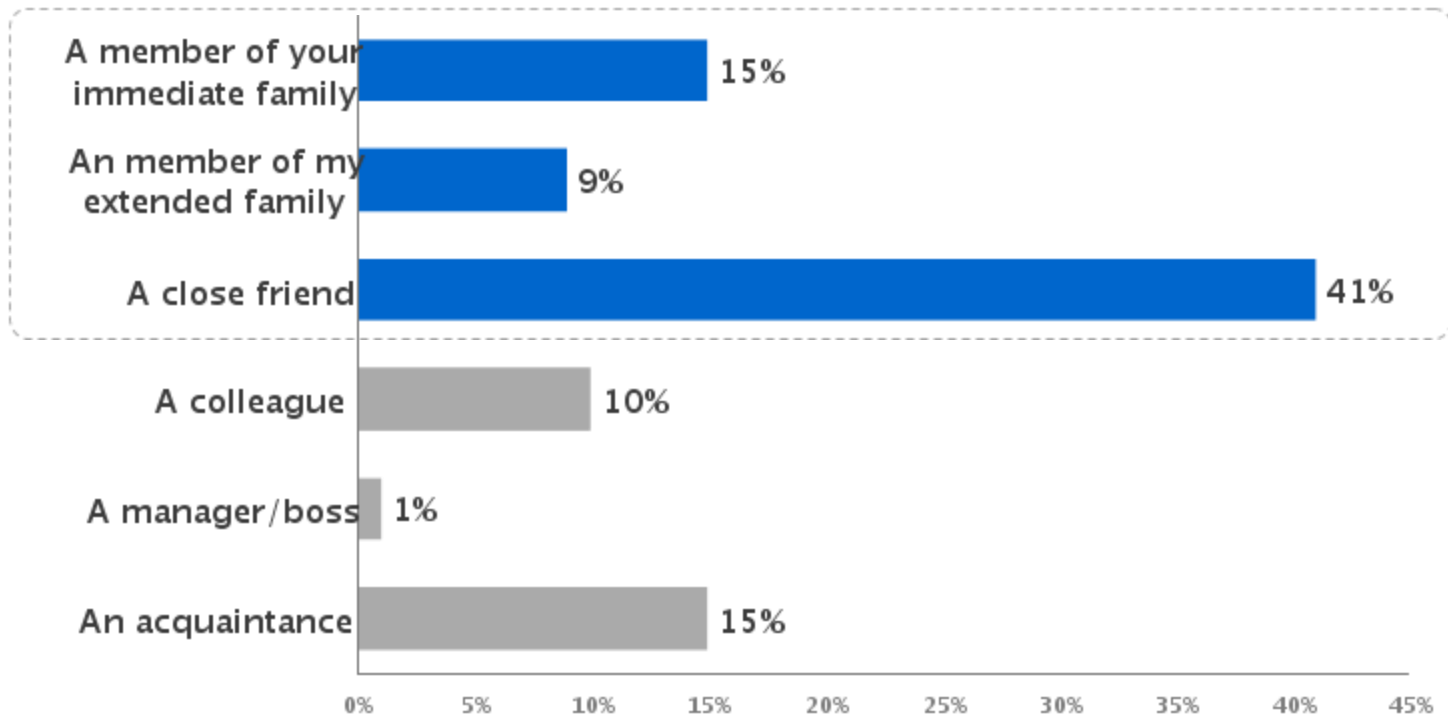
Q: Which of the following things would you be willing to give up for an entire year, in exchange for continuing to use Search Engines? Select all that apply (N = 708)

Source: BabyCenter Study on Google Search, Nov 2009



Google Has A Seat at the Dinner Table

65% consider Google a close friend or family member, 1 in 4 (24%) say Google is a family member.



65%

Q. Given the role Google plays in your life, imagine that Google is a person you know. Who would Google be to you? (Among moms who used Google in the past 30 days, N = 545)

Source: BabyCenter Study on Google Search, Nov 2009



What BabyCenter Moms say about Google...

If Google was a person you know, who would Google be?



[Leaf077](#)

Google is my BFF. It's who I turn to when I need answers, Support or the cold, hard truth.



[Crown Vic](#)

Google is me. Or more like...the me I want to be. I'm constantly wanting to know EVERYTHING about NOTHING. Wish I always had the right answers.



[Jessica-mom2charllie](#)

Google is an enabler friend who makes it so much easier to be lazy. Like your fat friend who makes you feel better about not going to the gym or eating your weight in Chips Ahoy.



[newparents2be](#)

Google would be a very good friend who has all the answers and will be honest with you at all times. Google's always there when you need them and is not busy for you.



[clameel](#)

If Google were a person I would ask him to marry me



[LuvMyTeetoe](#)

Google would be my Dad. Knows everything about everything, and sometimes will give you a surprising answer to a question! He is the go to guy





Conclusions

Moms Give Up Lipstick for Search

- 1** The Stork Delivers Search
Entry into motherhood creates a **unique window** for marketers to **use search to connect with moms** when they need information the most
- 2** Moms Become Black Belts in Search
Ensure **prominent presence** on the first page of results, and use **tailored keywords and phrases** to reach these sophisticated searchers
- 3** Search is Mom's GPS to Store
Customize search strategies to speak to moms throughout each stage of the **purchase funnel**, with a special emphasis on **value driven messaging**
- 4** Search is Mom's Back Up Brain
Don't underestimate the **power of 130 characters** to connect with moms at an **emotional level**

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