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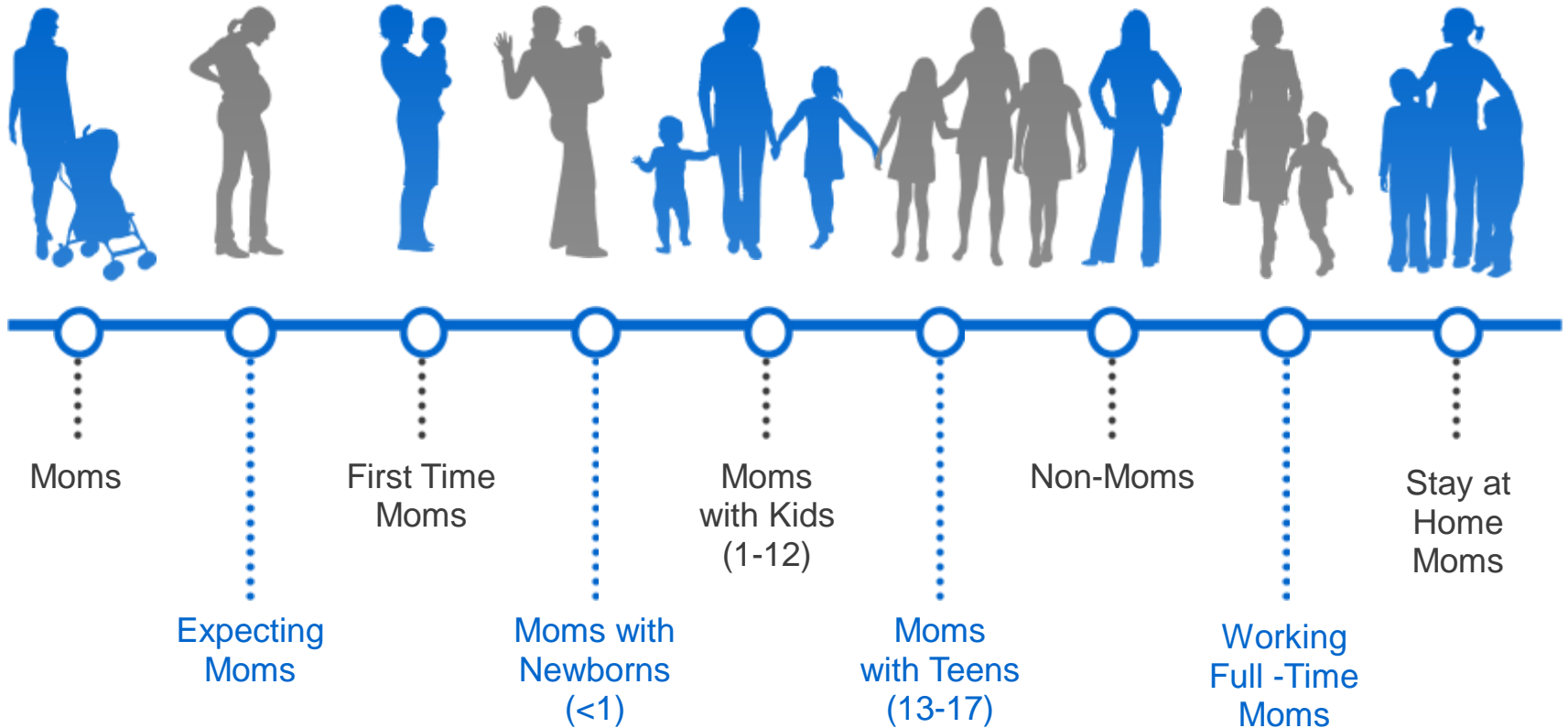


What Makes Mom Click for CPG

Google/OTX

U.S., January 2010

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

Summary & Marketing Implications

1 **Search is Always On for Moms** – A very unique window opens up when women become Moms. Connect with them via search whenever they are looking.

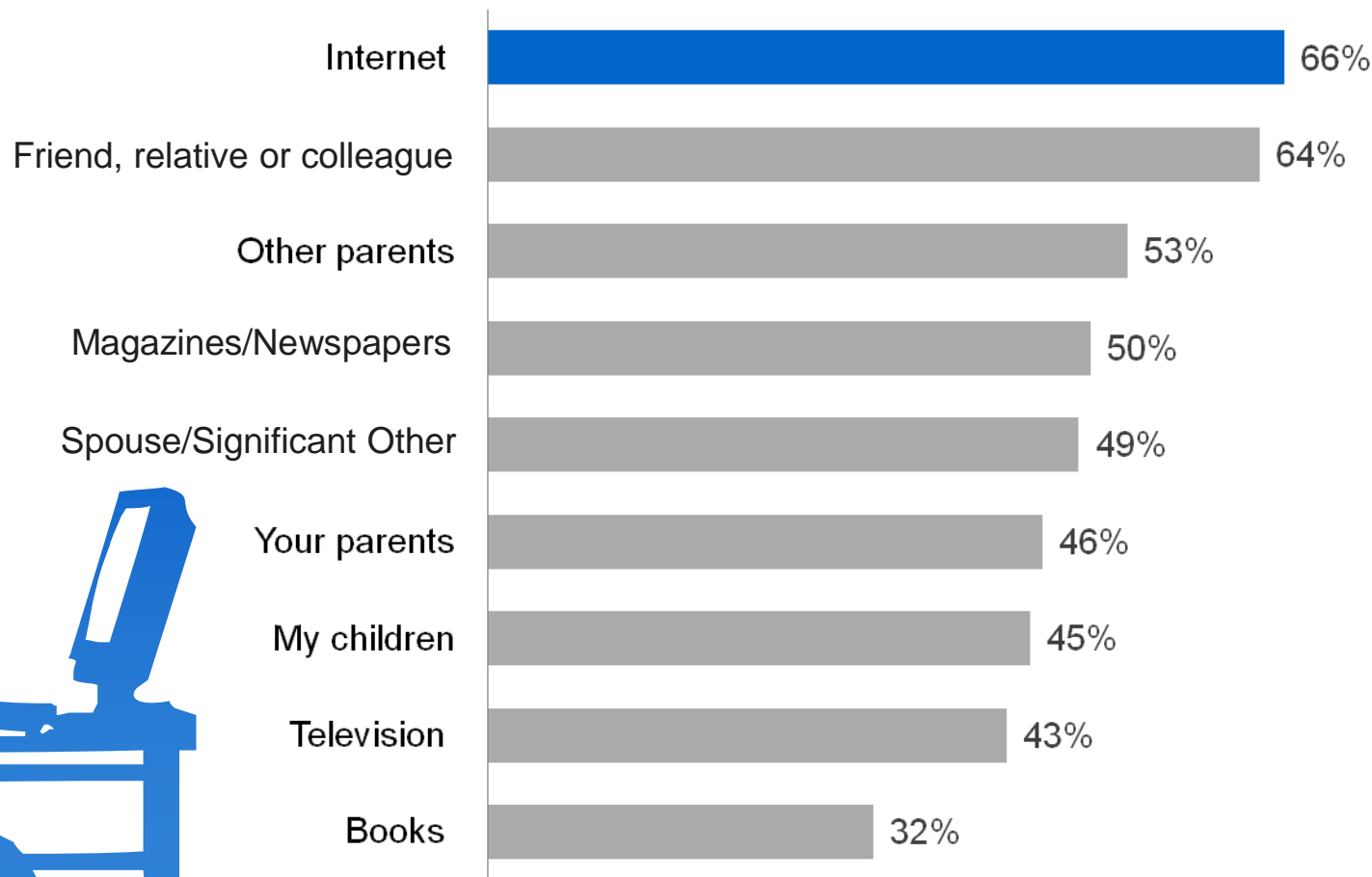
2 **Getting Behind Mom's Recipe Search Intentions** – Moms frequently search based on ingredients they have on hand rather than on branded terms.

3 **Moms Play the Coupon Game** – Online coupons have the ability to activate trial, brand switching and repeat purchase. Build an online coupon strategy.



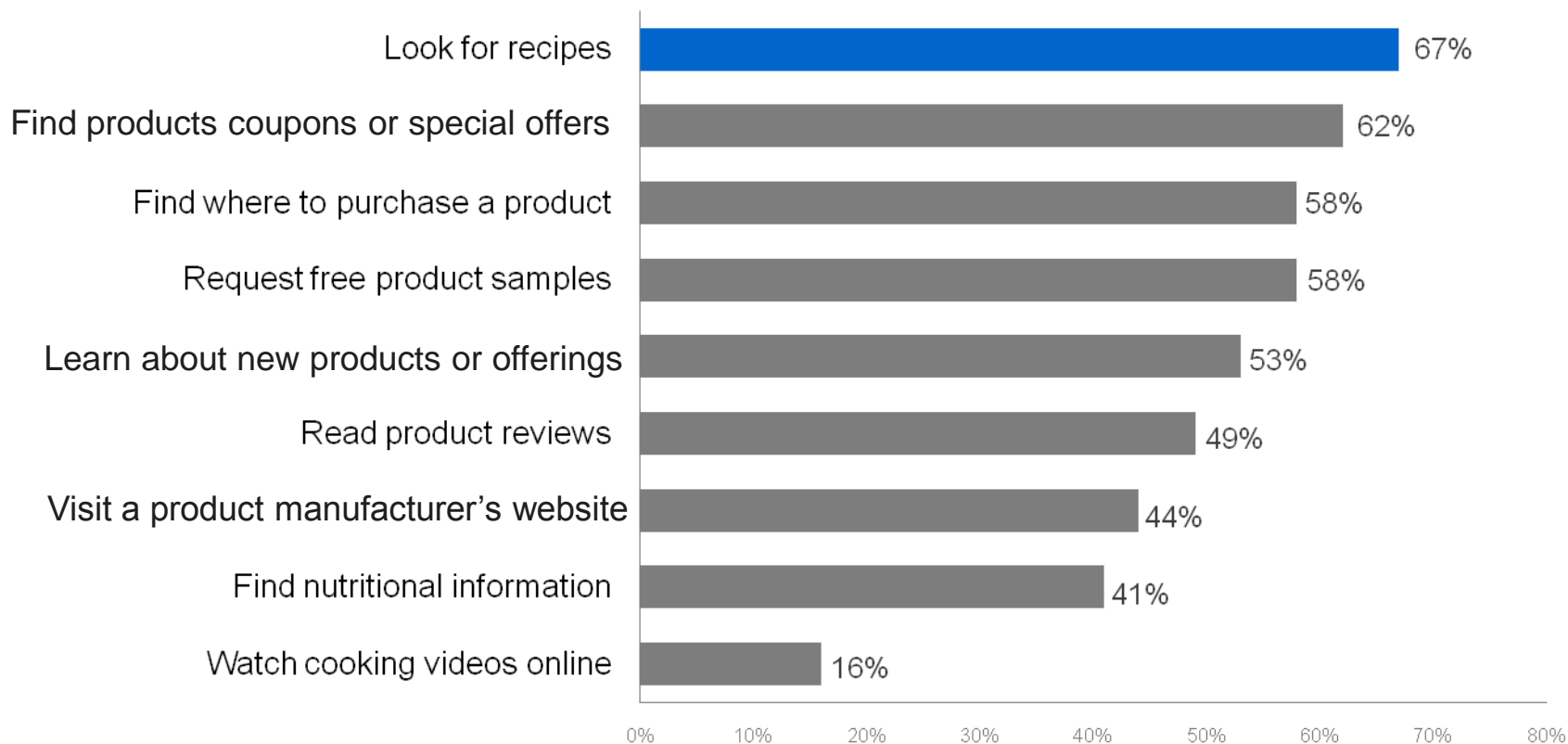
Search is Always On for CPG Moms

When it Comes to CPG, Moms Rely on the Internet More than They Rely on Friends & Family



Recipes & Deals are the Top Two Reasons Why Moms Search

48% of moms at least sometimes researches CPG related info using a search engine (vs. 38% of non moms.)



Q: Thinking about when you're online and using search engines (such as Google, Yahoo!, etc.), how often do you search for information on the following types of products or services? (CPG) N= 1474

Q: Which of the following do you do online? N=133

Source: Google BabyCenter OTX Moms Survey, November 2009

Moms Believe It's Their Duty to Research CPG...and They Enjoy It!

“As a mom, and the chief shopper, **I believe it's my job**”



“For me, taking care of my family is my main priority. So **when I save money, I feel like I am able to take care of them better**. I have my faults as a mother, but I can always be counted on to find a good deal on a product.

“I think I do enjoy it [researching CPG online] because I have a little bit of OCD. Getting the most for my money **gives me a rush** that used to be satisfied with clothes and shoe shopping.”

“I feel like a **consumer detective**. I like hearing what other people have to say.”

Source: Google Sterling Moms Qualitative Study, CPG Board, Nov 2009

Busy Moms Search for CPG Even While In Store

Location	Working Moms
At Home	51%
In My Car	19%
At Work	29%
At the Playground	21%
At the Supermarket, Drugstore or Mass Merchant	20%
At the Department Store or Mall	18%
At the Doctor's office	25%
At a Restaurant	21%



26% of working moms conduct CPG related searches on their mobile devices at least once a month or more (vs. 9% of stay at home moms)

Q: How often do you use search engines for each of the following product categories on your internet enabled mobile device? (CPG) N=213

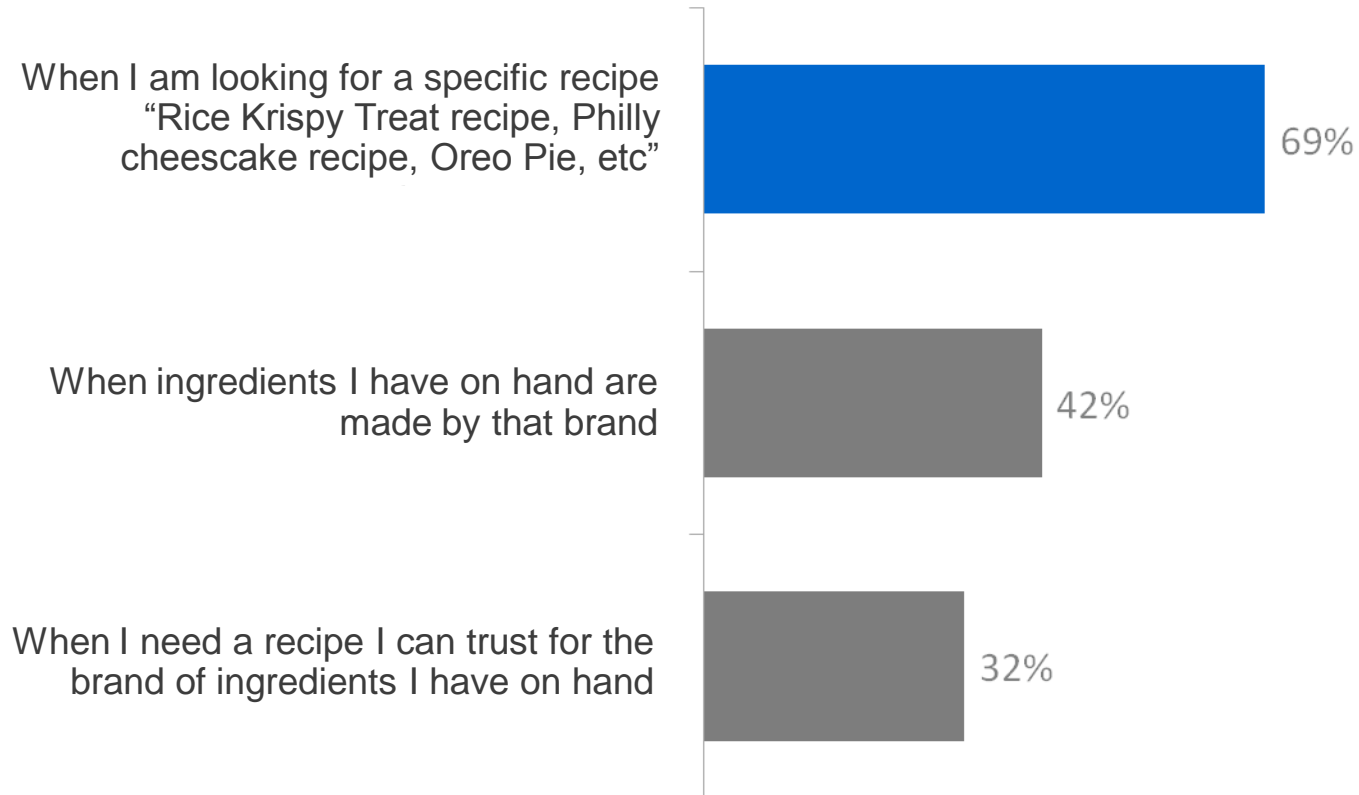
Q: In the last 30 days, from where did you use your mobile device to do an online search for each of the following product categories? N=96



Getting Behind Mom's Recipe Search Intentions

Branded Recipes Make Mom Click on Brand Sites

What drives moms to visit a **brand manufacturer's** website over another type of site?



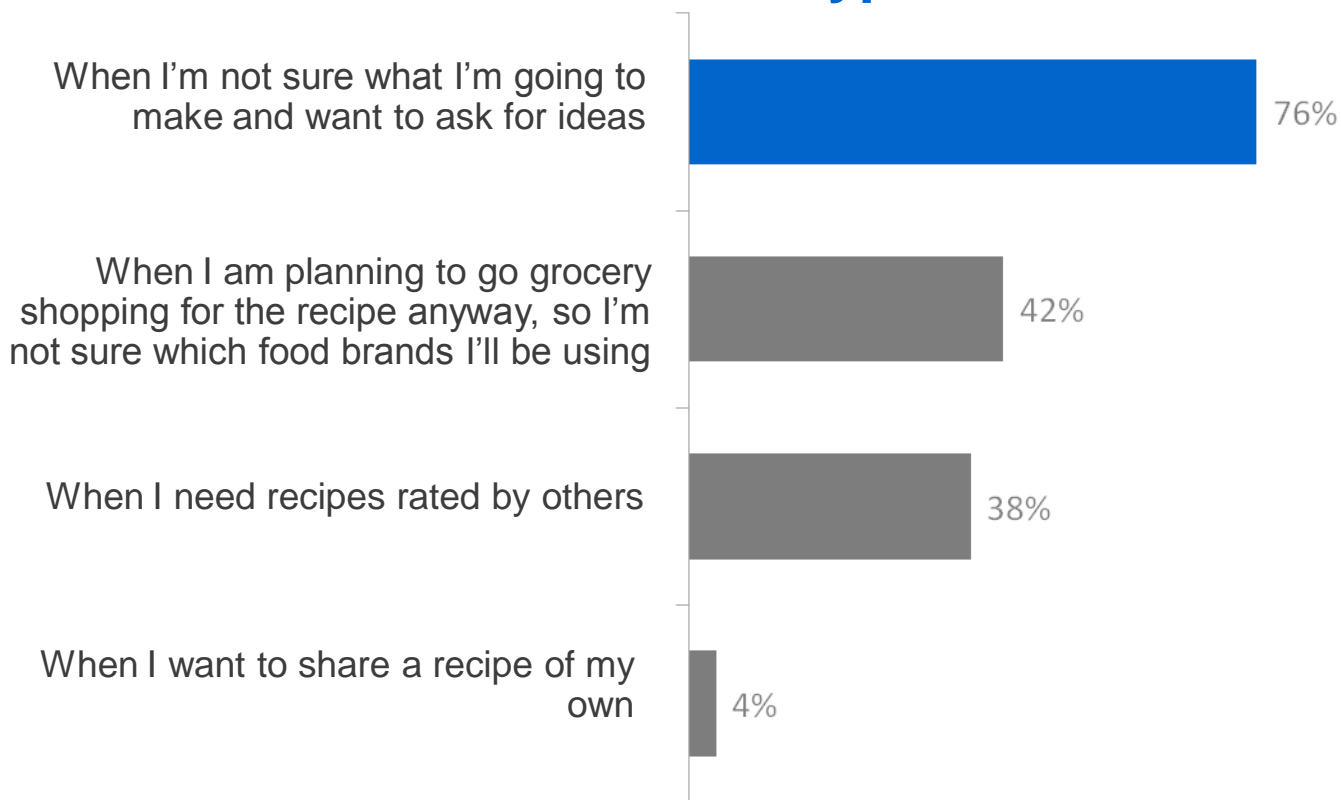
Q: When using a search engine to find recipes, under which of the following scenarios would you be most likely to use the search results to visit a brand manufacturer's website (e.g. KraftFoods.com, Campbell's.com)? (select all that apply)
(Base: Those who use search engines to find recipes, N = 412)

Source: BabyCenter Mealttime Mom Survey, Jan 2010



Moms Visit Food Community Recipe Sites to Spark Ideas

What drives moms to visit a food **community recipe** website over another type of site?



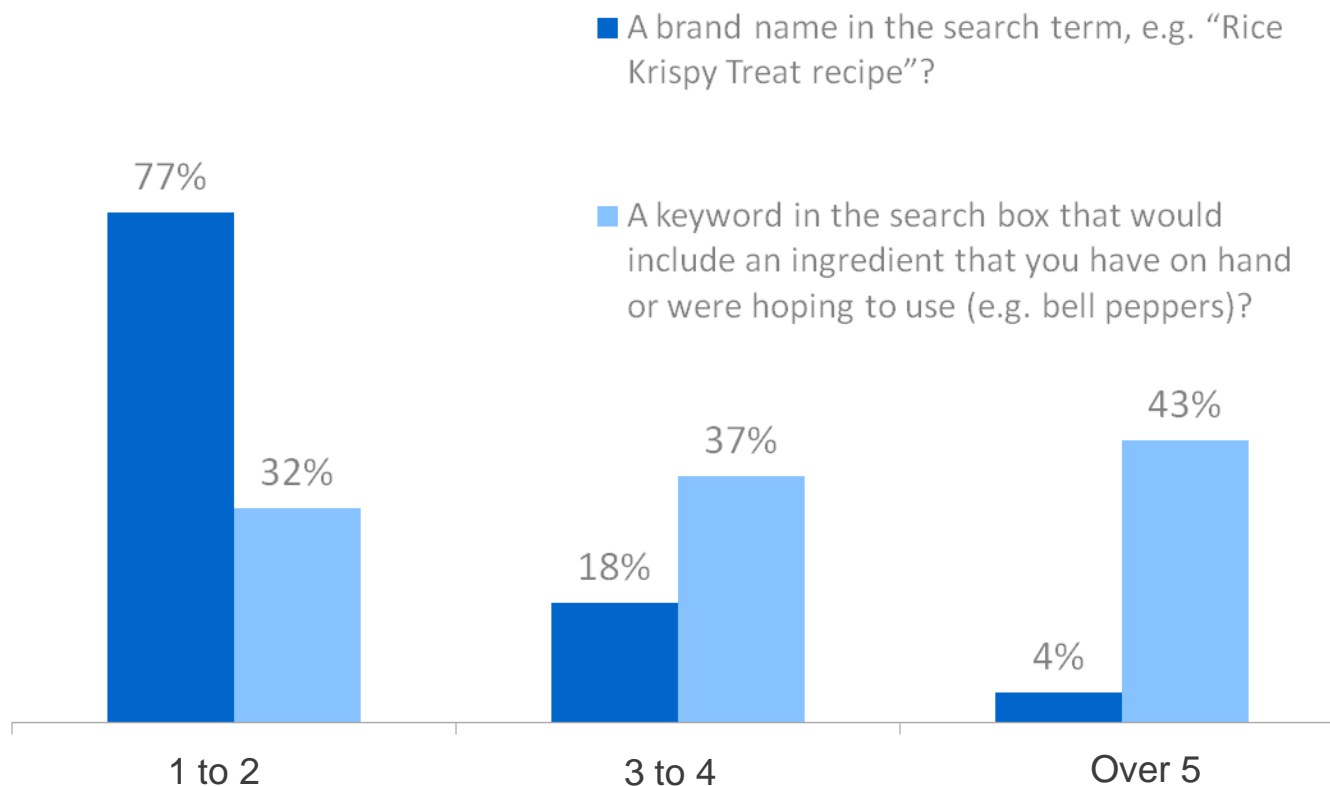
Q: when using a search engine to find recipes, under which of the following scenarios would you be most likely to use the search results to visit a food community website (e.g. AllRecipes.com, FoodNetwork.com)? (select all that apply)
(Base: Those who use search engines to find recipes, N = 409)

Source: BabyCenter Mealtime Mom Survey, Jan 2010



Moms Want to Make Use of Ingredients on Hand

Out of Mom's last 10 recipe searches...



Q: When thinking of the last 10 searches you've conducted related to recipes, how many of them included...
(Base: Those who use search engines to find recipes, N = 412)





Moms Play the Coupon Game

Moms Play “Beat the Register”

“I like **playing beat the register**, I consider saving \$60 on a shopping trip a win. I was using coupons before the economy tanked, but then I had to **get creative** and shop sales and more than one store to get the best prices, it used to annoy my husband, but now that he sees how much I save, **he points out sales and coupons.**” .”

“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.”

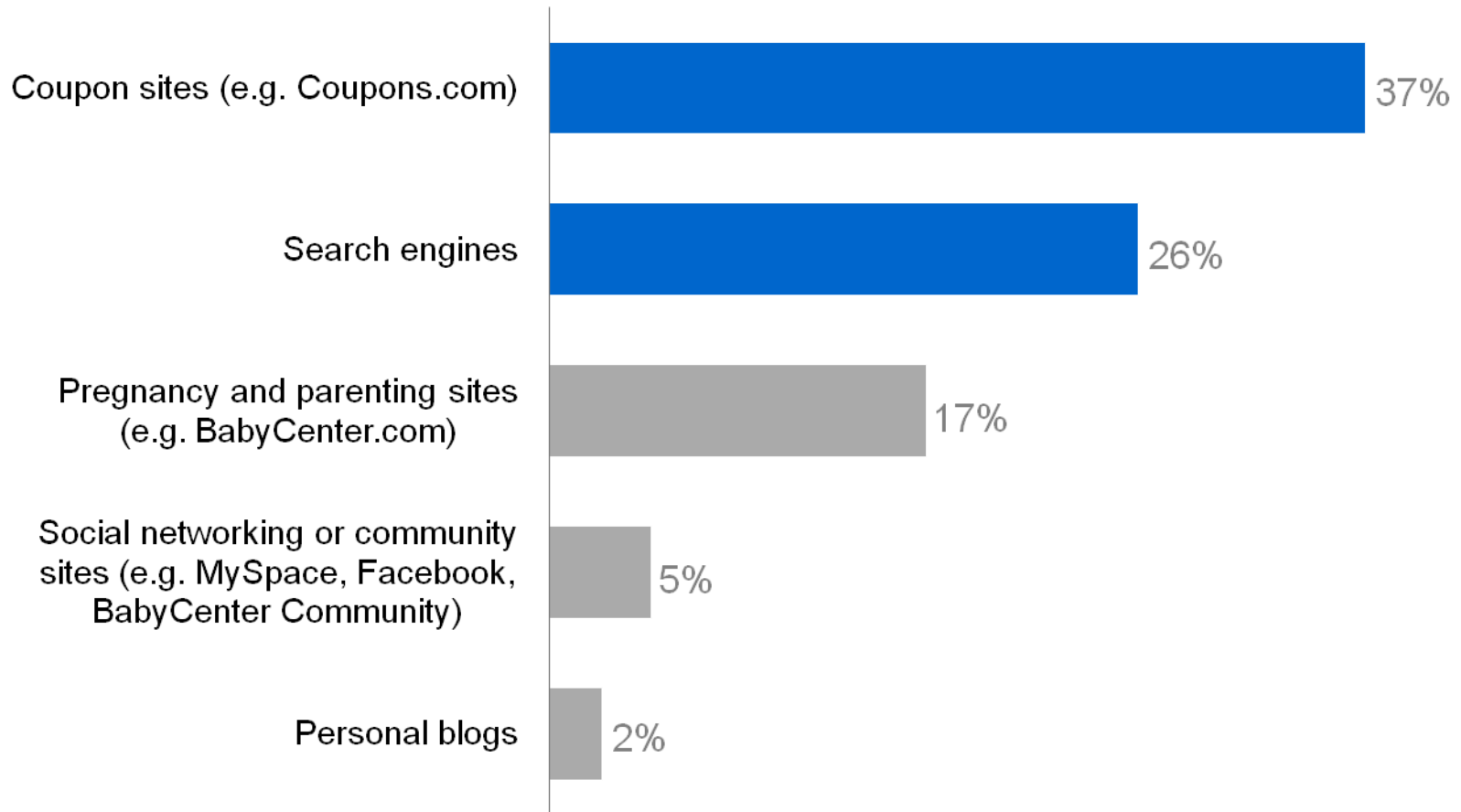


84%

of Moms look for coupons or deals online

Q: Which of the following types of sites do you use to look for coupons or deals online? (please select all that apply) (Among those who use coupons and feel more positive about brands that offer them coupons or deals, N = 587)

Coupon Sites and Search Engines Connect Moms to Deals More Than Social Networks

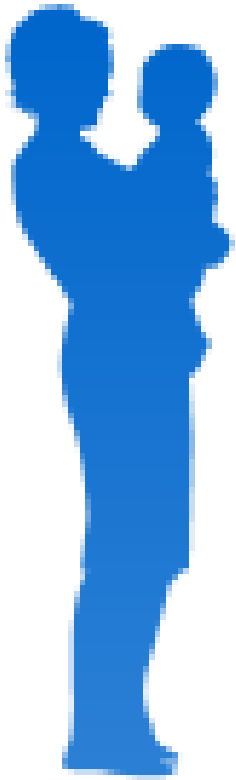


Q: Which of the following types of sites do you use to look for coupons or deals online? (please select all that apply) (Among those who use coupons and feel more positive about brands that offer them coupons or deals, N = 587)

Source: BabyCenter Study on Google Search, Nov 2009



Moms Think They Have Brands Figured Out



“When a new product **hits the shelf** there is usually coupon there to get it at a cheaper price. I like to try things then because the price will go back up later and I don’t feel bad on having bought the item if my family doesn’t like it.”

Source: Google Sterling Moms Qualitative Study, CPG Board, Nov 2009

Coupons Activate Brand Trial & Switching

“Coupons are a **big factor in my trying a new product**. Like the new Bounce Dryer Bar, I received a great coupon and couldn't wait to try it.”

“If one company has a coupon and another doesn't - often **I will buy the item with the coupon.**”

7 out of 10

(71%) would switch from a brand they were loyal to, to a new brand, if given a coupon for it

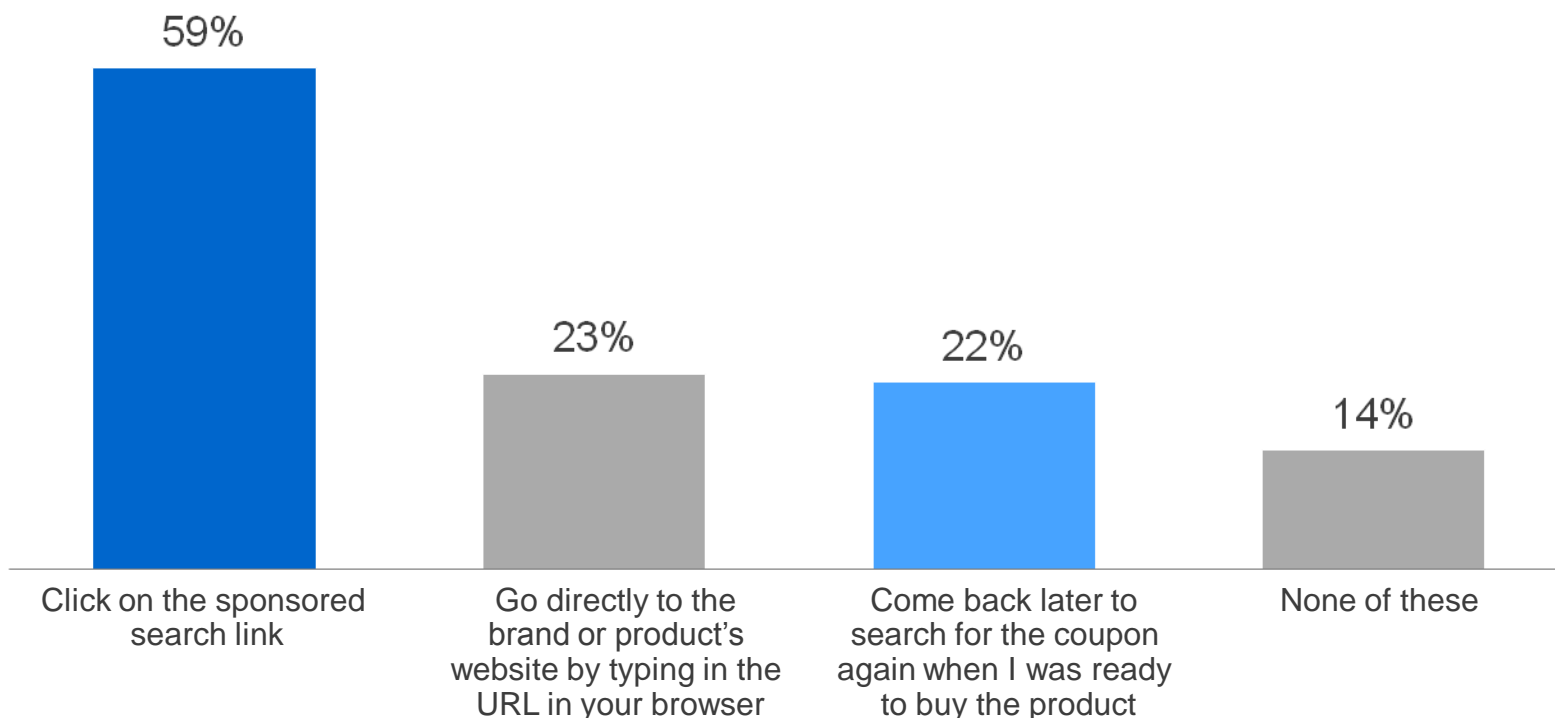


Q: Let's pretend you are loyal to a particular brand of product, and then a new brand of the same product offers you a coupon. How likely would you be to try the new brand? (Among those who use coupons, N = 61)

Source: Google Sterling Moms Qualitative Study, CPG Board, Nov 2009, BabyCenter Study on Google Search, Nov 2009

Moms Take Note of Sponsored Search Deals!

If **sponsored search** produces a needed coupon, **59%** would **click on it** and **22%** would **return for it later**



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

Source: BabyCenter Study on Google Search, Nov 2009



Online Coupons Trigger Repeat Purchase Behavior for Moms



7 out of 10

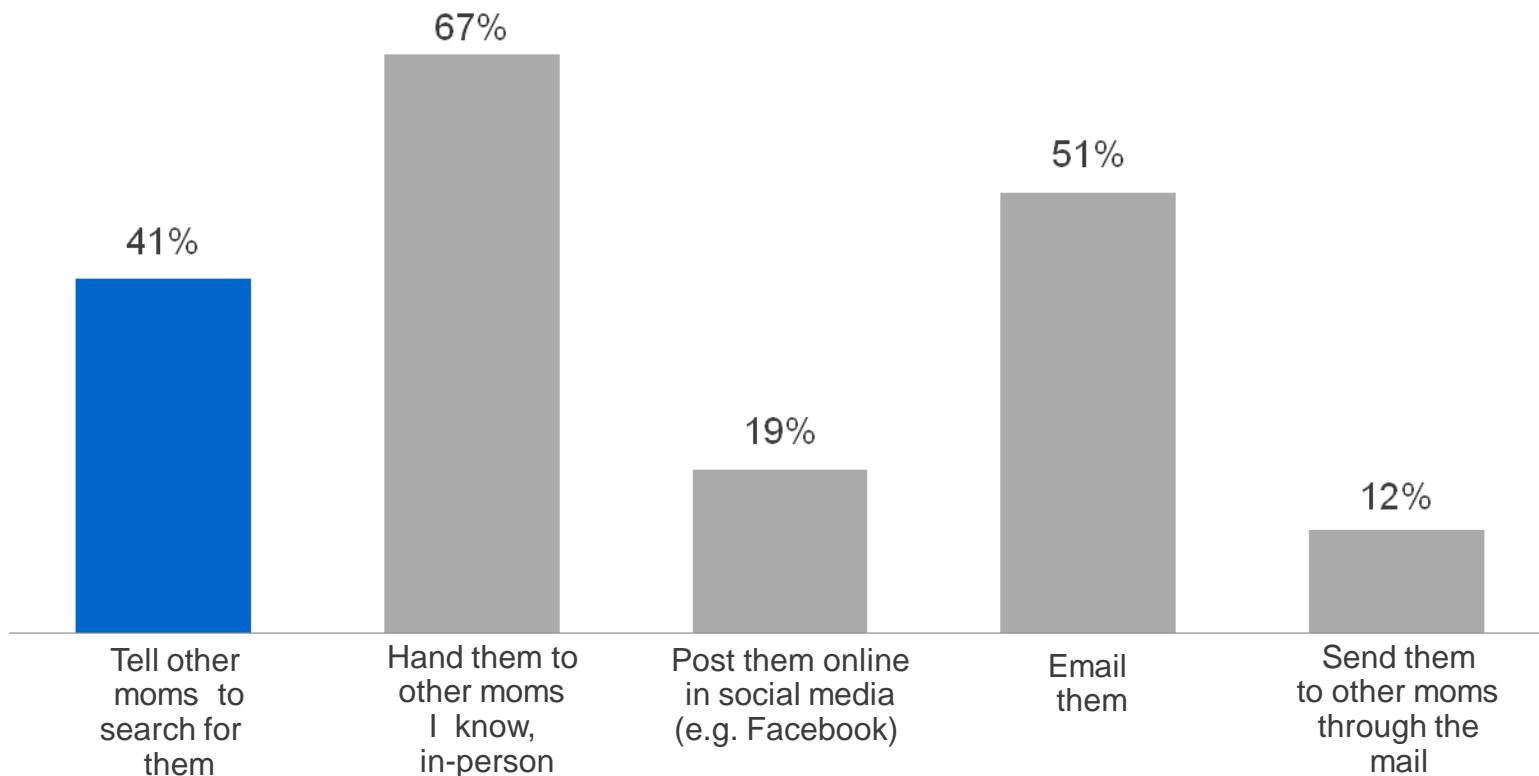
(71%) will buy a brand twice, after trying it once with an online coupon.



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)

Moms Share Coupons Through Search

40% share coupons with other moms; 41% share coupons with other moms by telling them to **search for them**

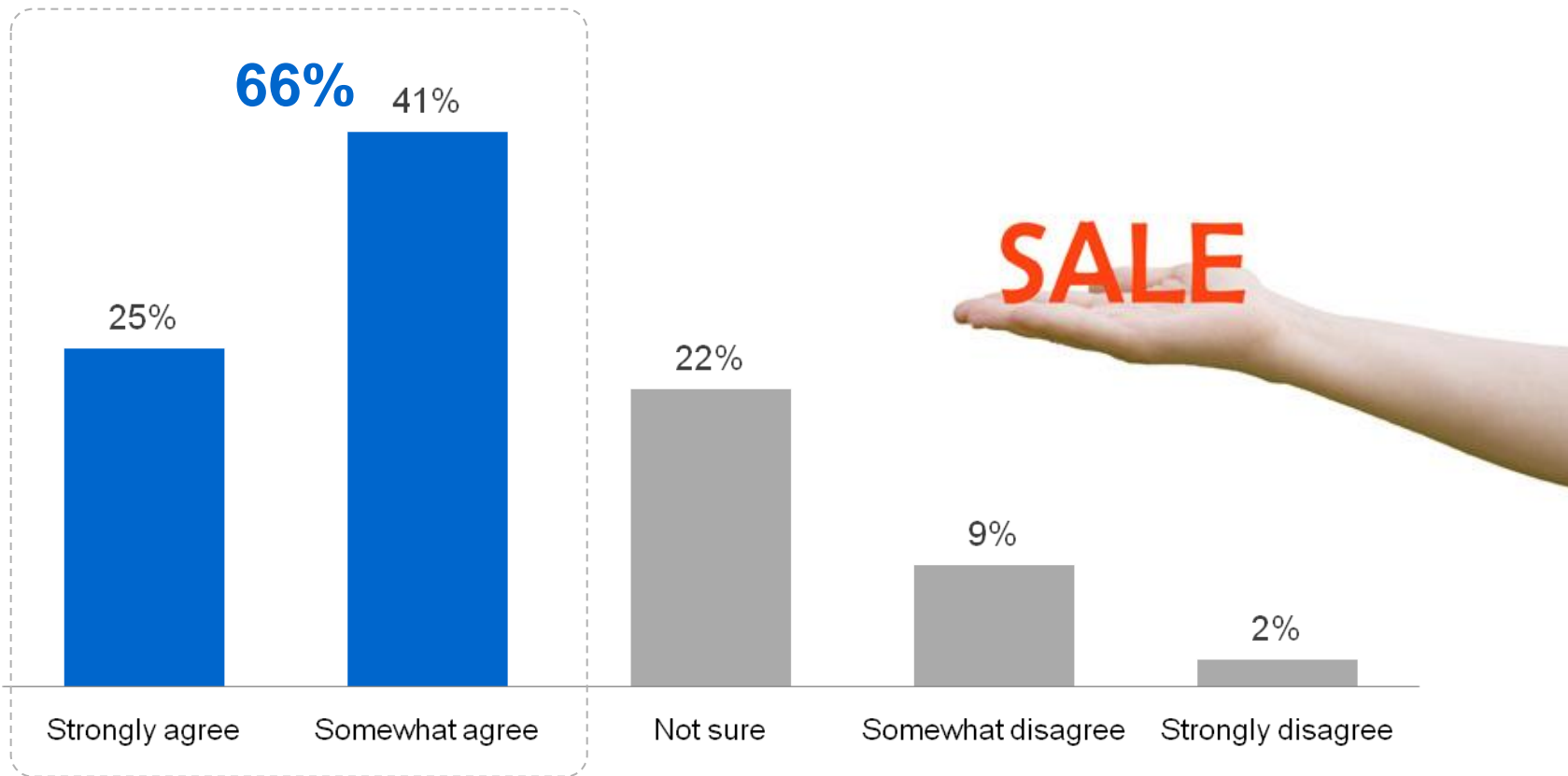


Q: How much do you agree that you feel more positive about brands that offer you coupons or deals?
(Among those who use coupons, N = 615)

Source: BabyCenter Study on Google Search, Nov 2009



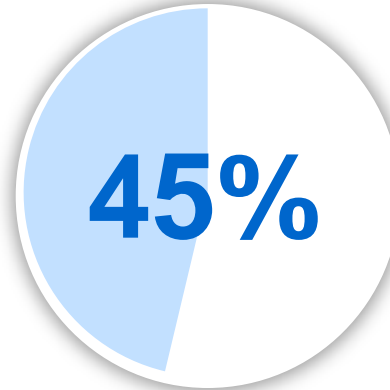
66% of Moms feel more **positive** about brands that offer them coupons or deals



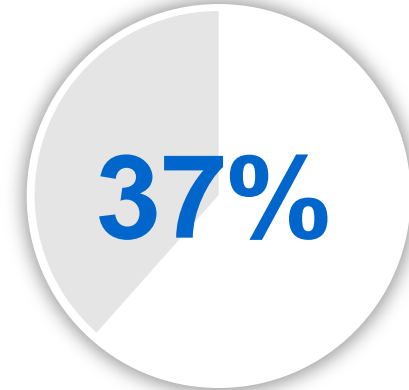
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(Among those who use coupons, N = 615)

Source: BabyCenter Study on Google Search, Nov 2009

Moms Buzz About Brands



♥ of moms say that there are brands they love, and that they have expressed this online



of moms say that there are brands that they dislike, and that they have expressed this online

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