



Mom's digital path to purchase

Winning moments that matter,
desktop to door

Google/Ipsos OTX
U.S. April 2012

Objective, background, and methodology

Objective

To understand how the internet affects mom's path to purchase across home, personal, beauty, food, beverages, and restaurant categories

Respondents

US residents, 18+, online at least once a week, have purchased or influence decisions in focus categories (above)

Sample

4,810 respondents. Moms and Non-Moms recruited using a sample sourced from the Ipsos OTX online sample community

Quota group

Expecting moms, first time moms, working moms, stay at home moms, moms with newborns, moms with kids (1-12), moms with kids (13-17), non moms, moms control group

Categories

Baby or child care products, food and beverages; household cleaning and laundry products; food from fast food or casual dining outlets, beauty and personal care

Top level findings

- 1** **Moms are online:** moms spend more time online than any other media type. This is growing year over year
- 2** **Moms search twice as much:** moms estimate that they conduct nearly twice as many online searches than prior to becoming a mom. Search is mom's top online activity
- 3** **Internet top product info source:** the internet is the single most used source to gather information on products and services
- 4** **Digital is effective across the entire path to purchase:** from generating awareness to driving sales
- 5** **Online ads outperforms traditional media:** online ads outperform other traditional media overall in impacting mom's action after exposure for a new product

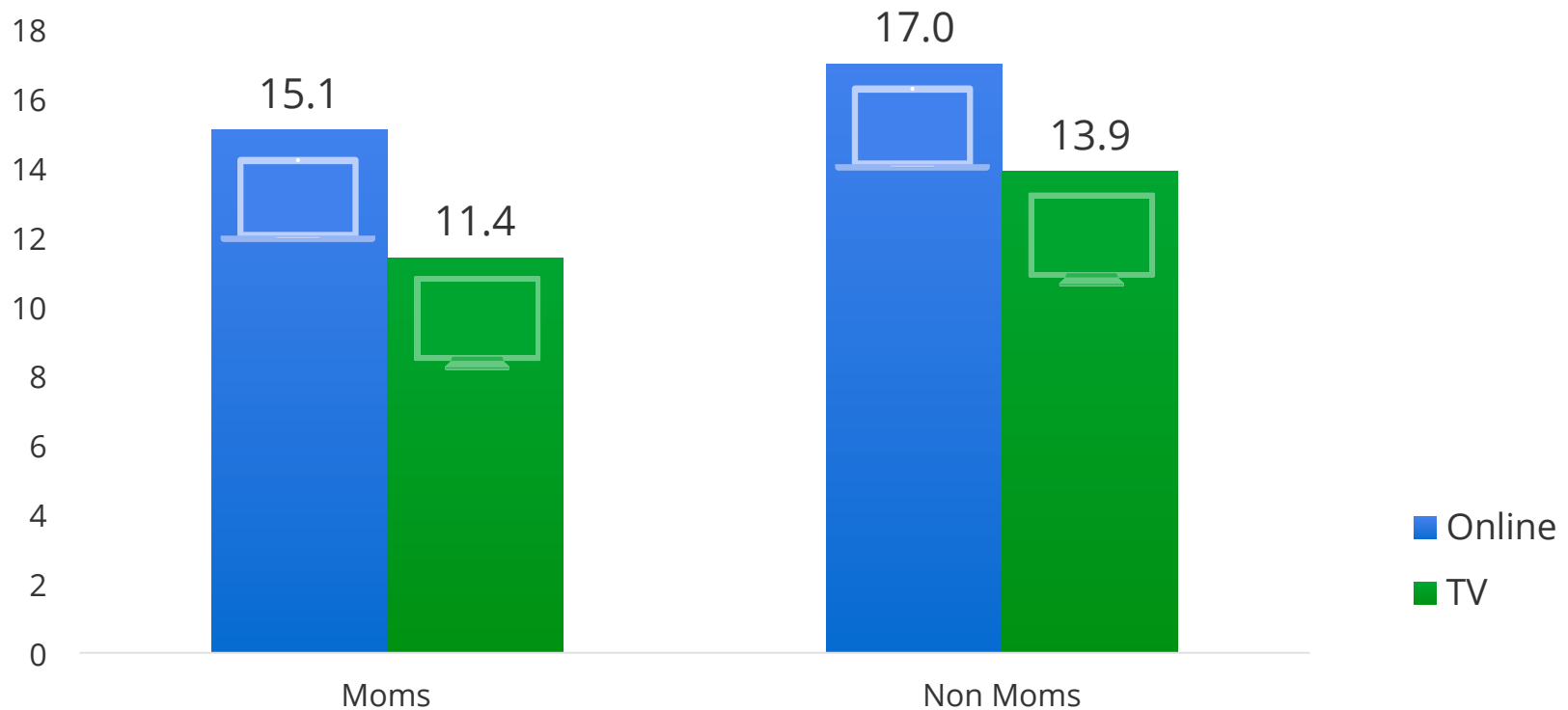
Top level findings

- 6** **3 out of 4 searchers make a purchase:** moms who search, report making a purchase (online or offline) as a result of conducting search for a product or service
- 7** **Online video and TV:** 1 in 3 moms watch online videos as much as or more than TV
- 8** **Social creates sales:** many moms purchase as a result of using social networks, but at lower levels than search

Moms are constantly
connected

Moms (and non moms) spend more time online than watching TV

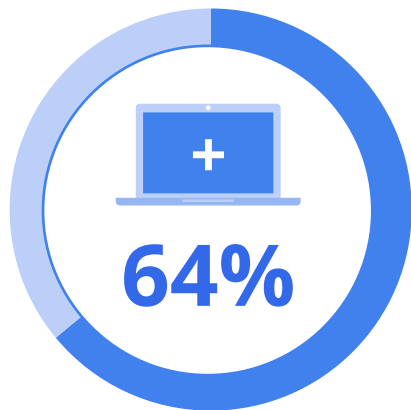
Average media consumption per week



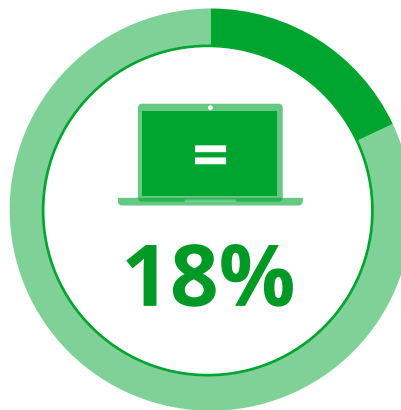
1 in 3 moms spends as much or more time watching videos online than watching TV

Online video vs. TV consumption

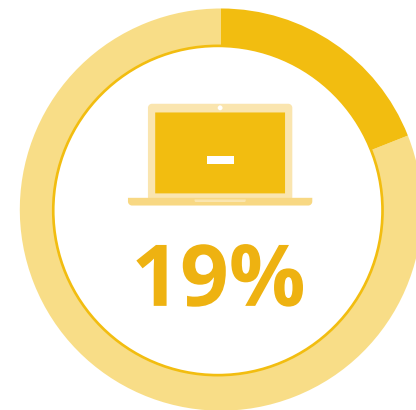
Average moms (n=390)



*I spend **more time watching videos online** than I do watching television*



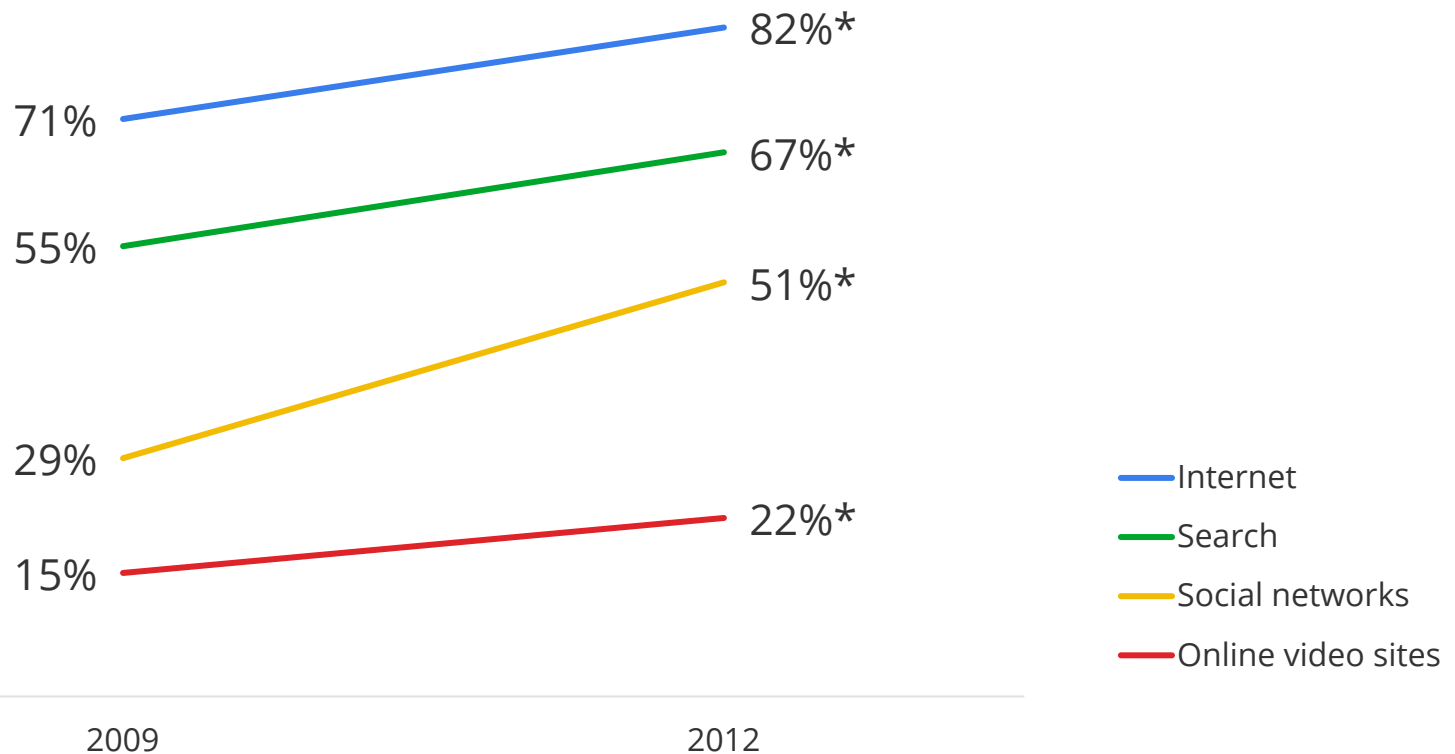
*I spend **about the same time** watching videos online as I do watching television*



*I spend **less time watching videos online** than I do watching television*

More moms are using search, social networks, and online video now than ever before

Sources used to gather info: change from 2009 to 2012



Source: Google/Ipsos OTX, Mom's Digital Path to Purchase Study, U.S., Apr 2012

Q6: Now we'd like to get a sense of how you gather information on products or services you need <IF PARENT: as a parent / IF EXPECTING: as an expecting parent>. Please select all the sources you use to gather information. Q8: Now we'd like to get a sense of how you gather information online <IF PARENT: as a parent> <IF EXPECTING: as an expecting parent>. Please select all the online sources of information you use <IF PARENT: as a parent> <IF EXPECTING: as an expecting parent>. Select all that apply. *Indicates significant difference from 2009 at 95% confidence level. Base: Total Average Moms; 2009 n=402, 2012 n=445

Moms use the internet to shop and look for information

Mom's top 5 online activities

73%

Shop for
myself or child



56%

Look for
information
for my kids



50%

Find things to
do with my
children



31%

Look for advice
on parenting



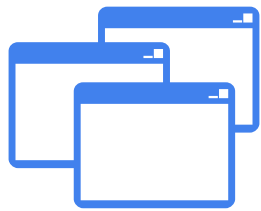
21%

Look for kid
friendly recipes



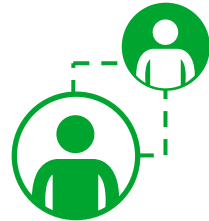
The internet is mom's #1 source for info on products and services

Top sources mom's use to find info on products & services



82%

Internet



69%

Friend, relative
colleague



56%

Other
parents



56%

Significant
other

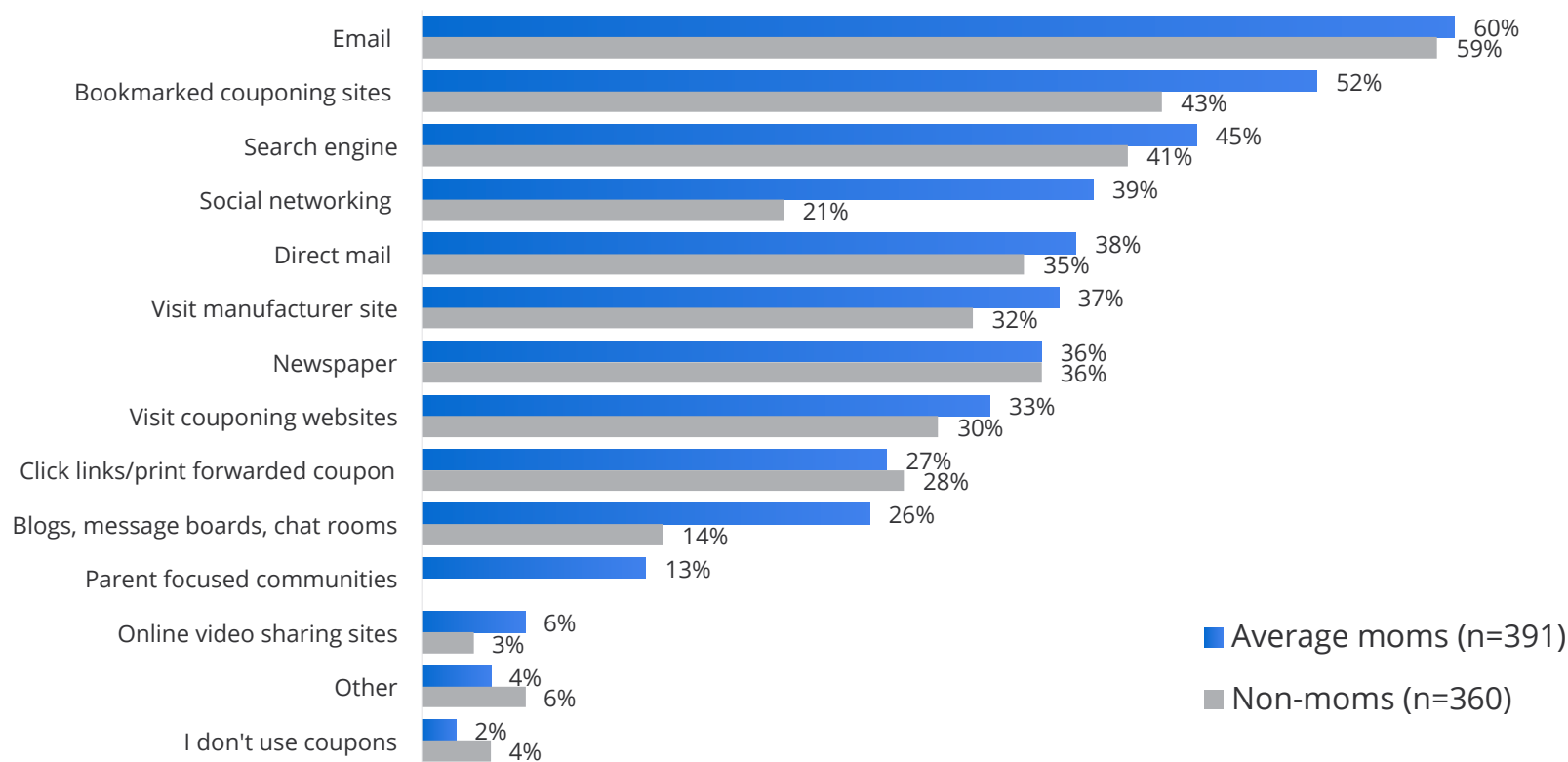


52%

TV

How learn about or find online coupons

Email and couponing websites are most popular for finding coupons, with search engines just behind; moms are also likely to use social networks to help



Moms are search ninjas

Moms' search frequency almost doubles after becoming a mom

Average number of searches conducted per week

Before becoming a mom **13**



After becoming a mom **24**

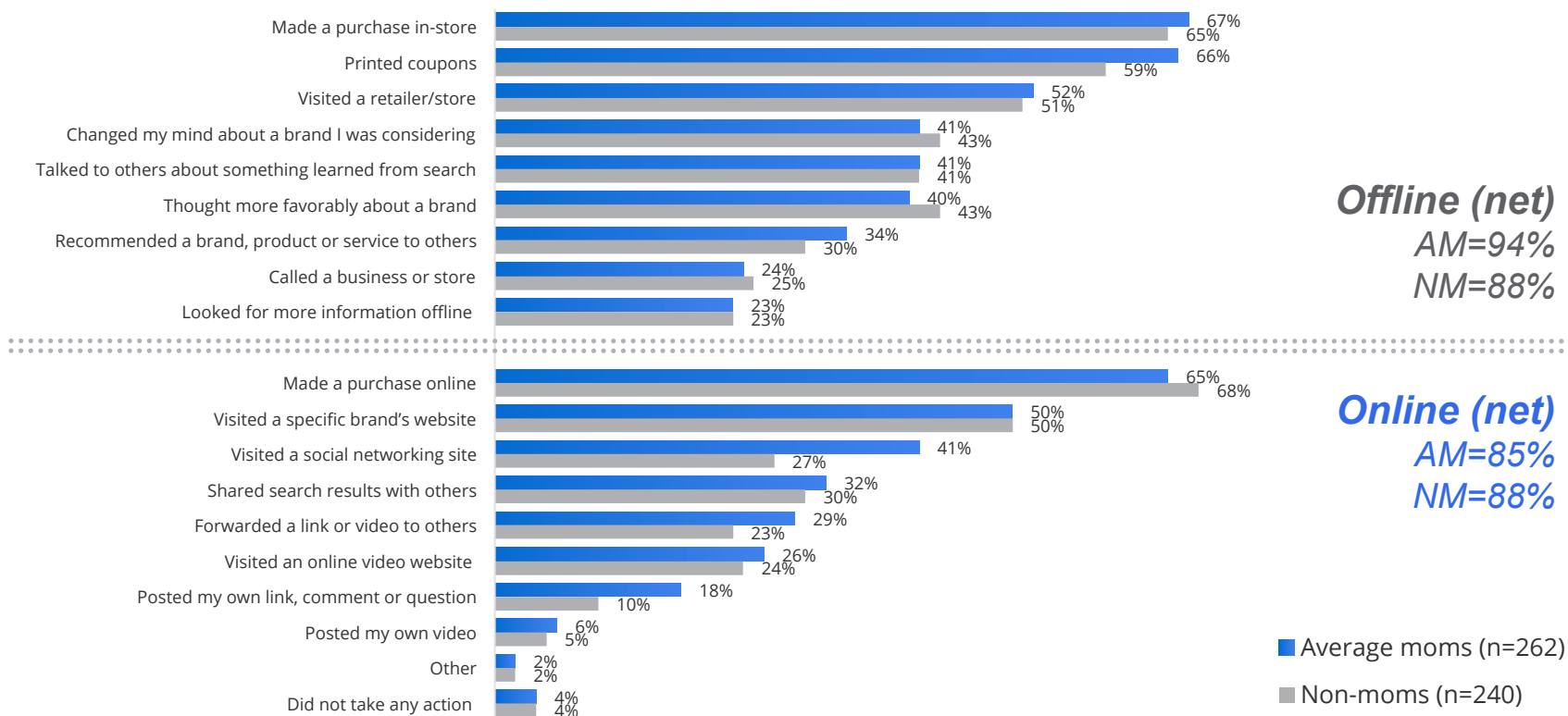


Searches increase 85% after becoming a mom

Search engines drive purchase (online and offline) and impact brands favorably

Resulting actions from using search engines

Expecting moms/first time moms/moms with newborns (n=432)

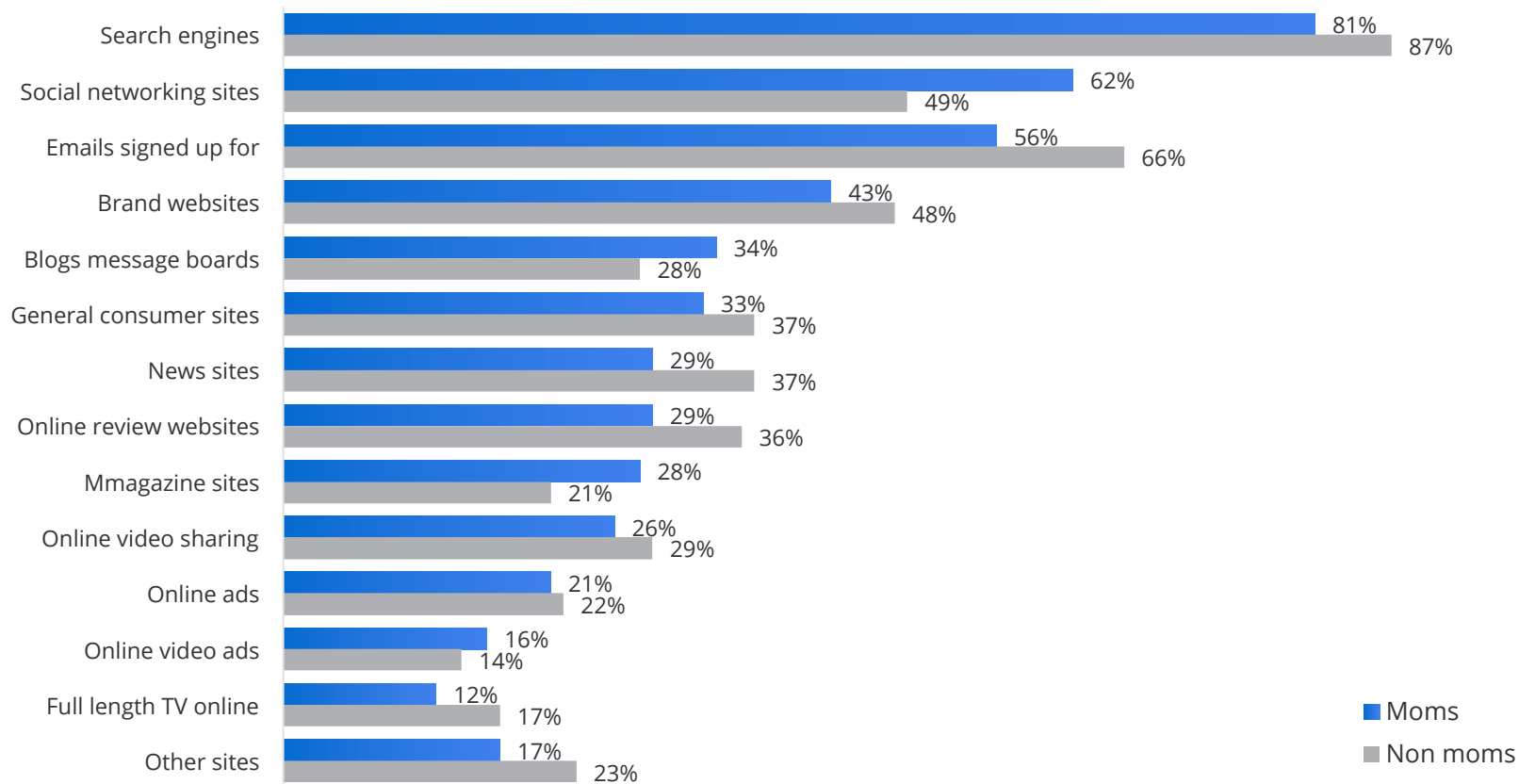


Source: Google/Ipsos OTX, Mom's Digital Path to Purchase Study, U.S., Apr 2012

* Made a purchase (net): AM = 81%, NM = 82%. Q22: Which of the following actions, if any, have you taken as a result of gathering information on a specific category product or service for yourself INSERT IF MOM: or for your (INSERT S11 ANSWER) <INSERT IF EXPECTING: or as an expecting parent> using search engines (like Google, Yahoo!, Bing, etc.)? Please select all that apply. Base: Those who use search for category of study.

Once online, search engines are primary way to gather information

Online sources used to gather info on products & services



Source: Google/Ipsos OTX, Mom's Digital Path to Purchase Study, U.S., Apr 2012

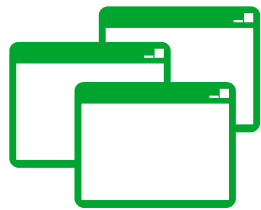
Q8: Now we'd like to get a sense of how you gather information online <IF PARENT: as a parent> <IF EXPECTING: as an expecting parent>. Please select all the online sources of information you use <IF PARENT: as a parent> <IF EXPECTING: as an expecting parent>. Select all that apply.

Moms hear about new products through TV and online



60%

TV



50%

Internet



47%

Friend, relative,
colleague



42%

in store
display

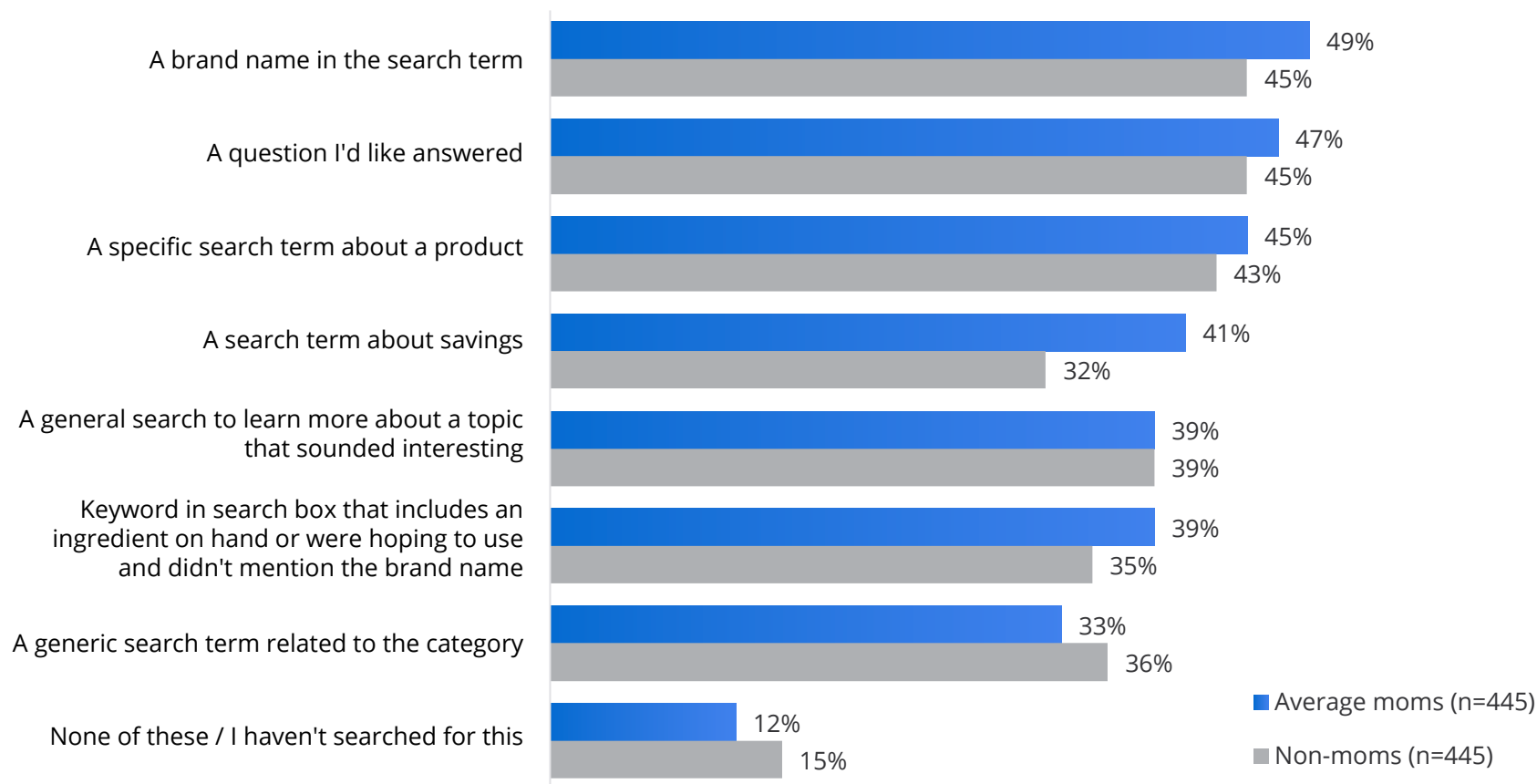


42%

Magazine,
newspaper

Moms are searching in many ways for new products and services, though a brand name or question top the list

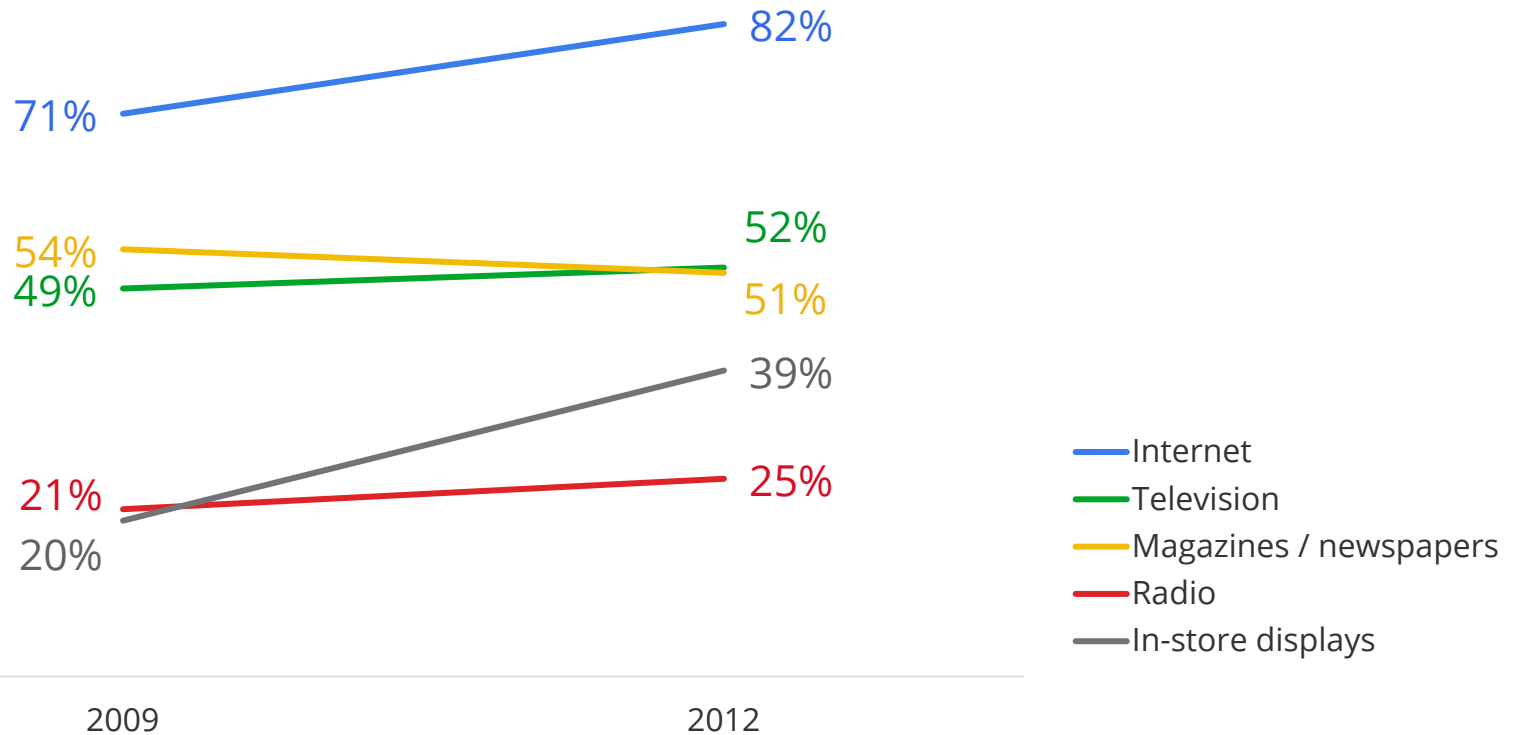
Search terms used for new products or services



Ad effectiveness

Moms reliance on the internet and in-store displays is on the rise

Sources used to gather info on products or services



Source: Google/Ipsos OTX, Mom's Digital Path to Purchase Study, U.S., Apr 2012

*Arrow indicates significant difference from 2009 at 95% confidence level.

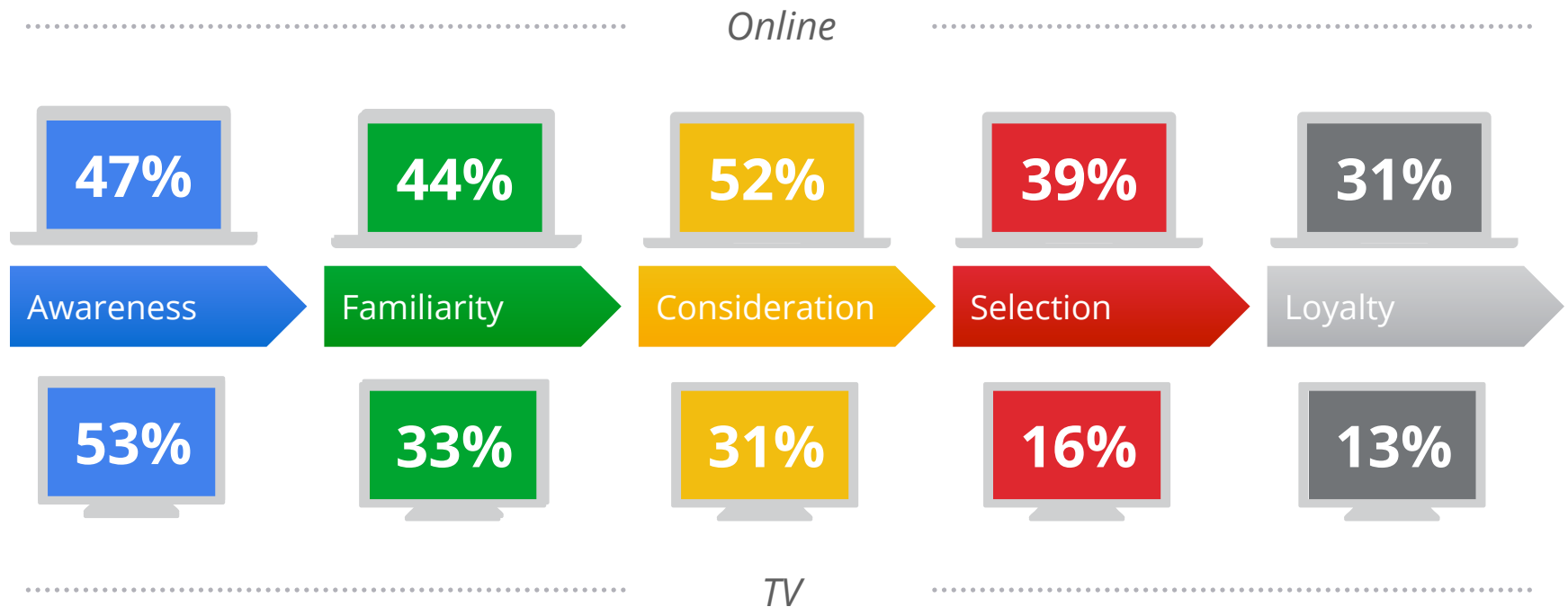
Q6: Now we'd like to get a sense of how you gather information on products or services you need <IF PARENT: as a parent / IF EXPECTING: as an expecting parent>.

Please select all the sources you use to gather information.

Base: Total Average Moms; 2009 n=402, 2012 n=445

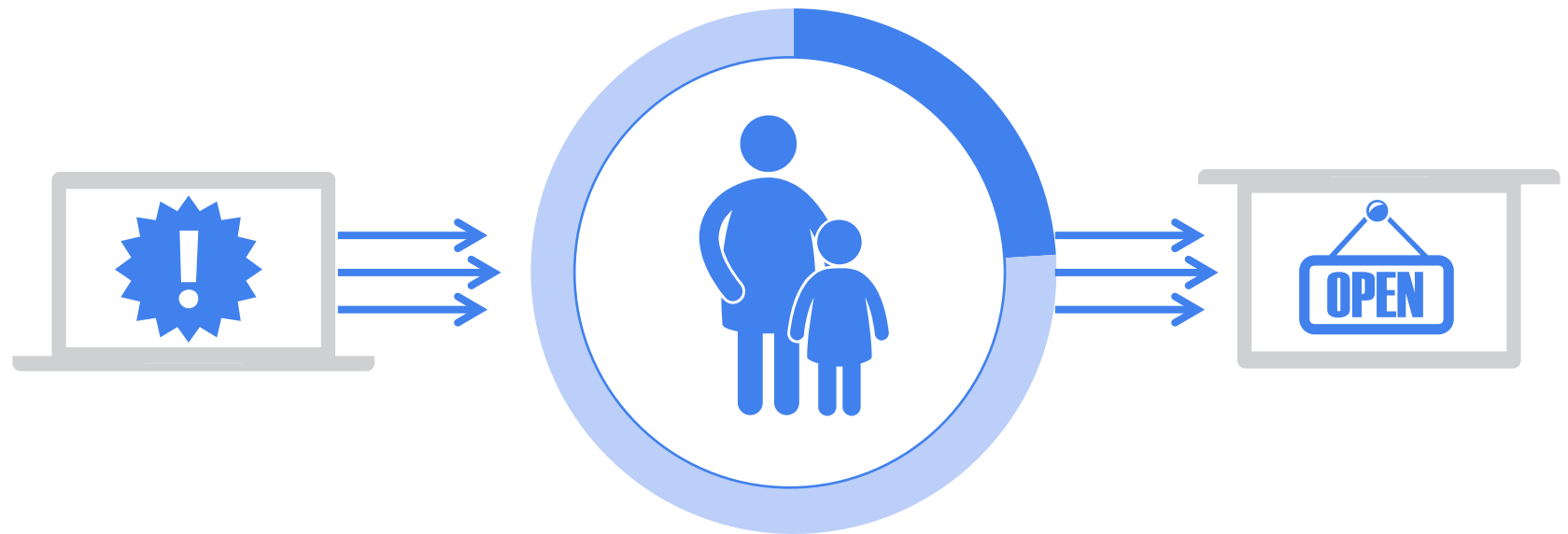
Online wins moments that matter with moms

Online outperforms TV in 4 out of 5 stages of the purchase cycle



Source: Google/Ipsos OTX, Mom's Digital Path to Purchase Study, U.S., Apr 2012

Q7: Think about when you purchase a product or service you need as a <INSERT PARENT/EXPECTING PARENT>. At what stage in the purchase process, do you use each of the following sources? Please select all that apply for each.



24%

*of moms made a purchase in store
as the result of an online ad*

Resulting actions from new product or service ad exposure

Online ads outperform other traditional media overall in impacting moms' action after exposure

| | TV ad | Online ad | Print ad | In-store ad | Radio ad |
|--|------------|------------|------------|-------------|------------|
| Base: | 445 | 445 | 445 | 445 | 445 |
| Offline (Net) | 48% | 49% | 47% | 47% | 27% |
| <i>Visited a retailer/store</i> | 26% | 24% | 20% | 16% | 9% |
| <i>Make a purchase in-store</i> | 25% | 24% | 28% | 32% | 11% |
| <i>Talked to others about something I learned from searching</i> | 17% | 22% | 12% | 12% | 9% |
| <i>Thought more favorably about a brand</i> | 16% | 22% | 13% | 13% | 7% |
| <i>Changed my mind about a brand I was considering</i> | 13% | 19% | 10% | 12% | 4% |
| <i>Recommended a brand, product or service to others</i> | 12% | 19% | 13% | 10% | 6% |
| Online (Net) | 44% | 50% | 34% | 27% | 24% |
| <i>Used a search engine to find more information</i> | 25% | 30% | 19% | 13% | 12% |
| <i>Visited a specific brand's website</i> | 23% | 29% | 17% | 11% | 10% |
| <i>Make a purchase online</i> | 18% | 32% | 14% | 8% | 7% |
| <i>Visited a social networking site</i> | 15% | 27% | 9% | 8% | 7% |
| <i>Looked for more information offline</i> | 13% | 14% | 12% | 10% | 8% |
| <i>Visited an online video website</i> | 11% | 19% | 6% | 6% | 7% |
| <i>Other</i> | 7% | 9% | 6% | 4% | 5% |
| <i>Have not taken any action as a result of this type of ad</i> | 38% | 39% | 41% | 47% | 62% |

Source: Google/Ipsos OTX, Mom's Digital Path to Purchase Study, U.S., Apr 2012

Q42: Which of the following actions, if any, have you taken as a result of seeing or hearing the following types of advertisements for a new product or service? Please select all that apply.

Base: Total, Average Moms

Moms are more likely to think more favorably about a brand or make recommendations to after online ad exposure relative to non-moms

Resulting actions from new product or service ad exposure (% prompted to take action offline)

| | TV ad | | Print ad | | Radio ad | | Online ad | | In-store display ad | |
|--|------------|------------|------------|------------|------------|------------|------------|------------|---------------------|------------|
| | Avg mom | Non-mom | Avg mom | Non-mom | Avg mom | Non-mom | Avg mom | Non-mom | Avg mom | Non-mom |
| <i>Base</i> | 445 | 445 | 445 | 445 | 445 | 445 | 445 | 445 | 445 | 445 |
| Offline (Net) | 48% | 49% | 47% | 42% | 27% | 21% | 49% | 43% | 47% | 43% |
| <i>Visited a retailer/store</i> | 26% | 23% | 20% | 20% | 9% | 9% | 24% | 19% | 16% | 14% |
| <i>Made a purchase in-store</i> | 25% | 26% | 28% | 25% | 11% | 9% | 24% | 22% | 32% | 29% |
| <i>Talked to others about something I learned from searching</i> | 17% | 16% | 12% | 9% | 9% | 7% | 22% | 20% | 12% | 9% |
| <i>Thought more favorably about a brand</i> | 16% | 20% | 13% | 12% | 7% | 7% | 22% | 13% | 13% | 11% |
| <i>Changed my mind about a brand I was considering</i> | 13% | 12% | 10% | 9% | 4% | 5% | 19% | 16% | 12% | 12% |
| <i>Looked for more information offline</i> | 13% | 11% | 12% | 12% | 8% | 5% | 14% | 13% | 10% | 8% |
| <i>Recommended a brand, product or service to others</i> | 12% | 14% | 13% | 8% | 6% | 7% | 19% | 13% | 10% | 11% |

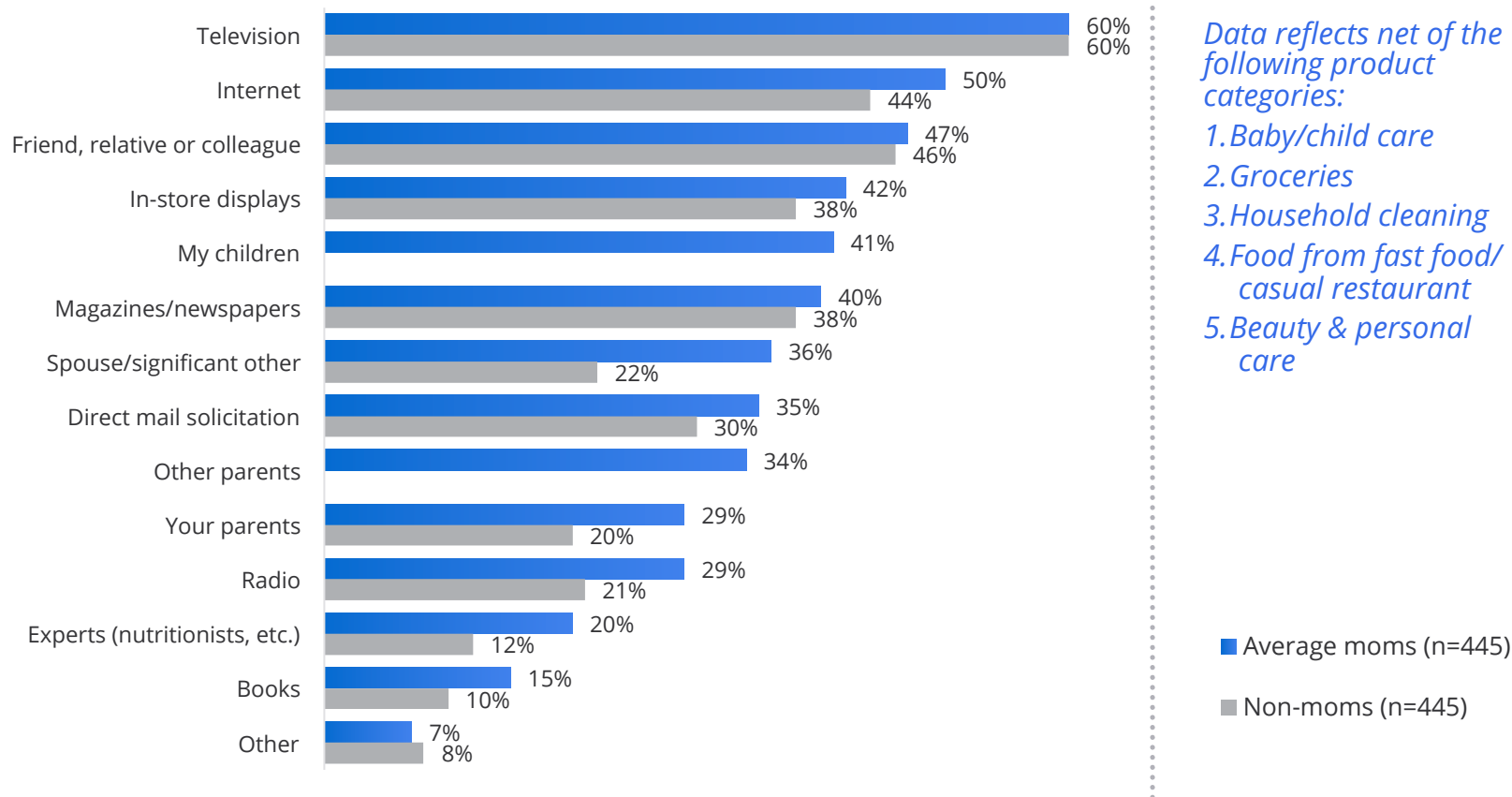
Source: Google/Ipsos OTX, Mom's Digital Path to Purchase Study, U.S., Apr 2012

Q42: Which of the following actions, if any, have you taken as a result of seeing or hearing the following types of advertisements for a new product or service? Please select all that apply.

Base: Total

Moms first hear about new products or services from TV most often

The internet is popular too, just trailing TV



Source: Google/Ipsos OTX, Mom's Digital Path to Purchase Study, U.S., Apr 2012

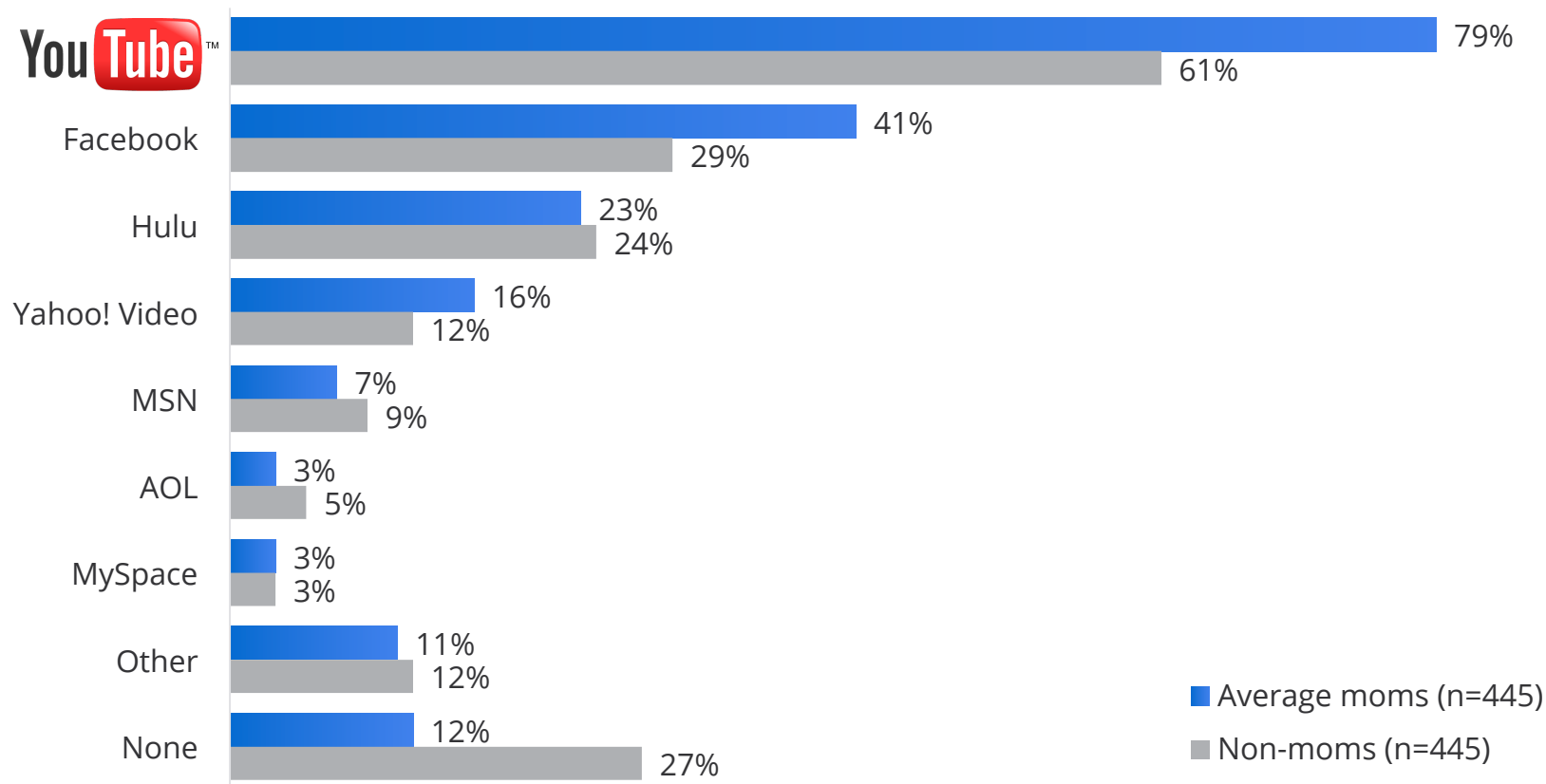
Q40: Where do you first see or hear about new products or services you are interested in for each of these categories?
 Please select all that apply.

Base: Total, moms who purchase category of study.

Video mom

Moms use YouTube to watch online videos more than any other site

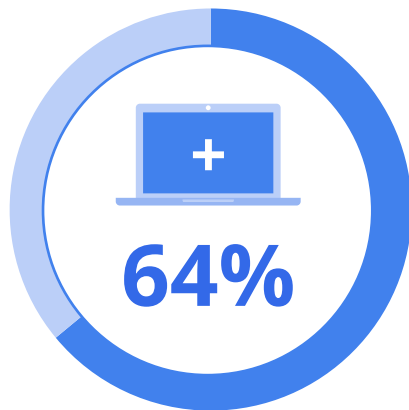
Online video websites used



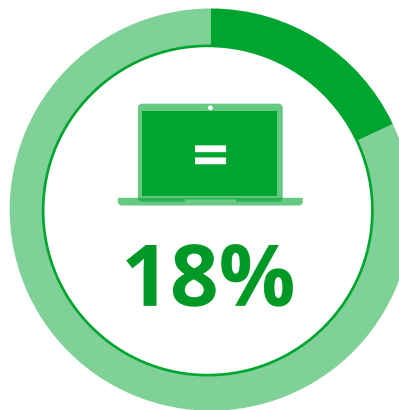
Roughly 1 in 5 moms spend more time watching videos online than watching TV

Online video vs. TV consumption

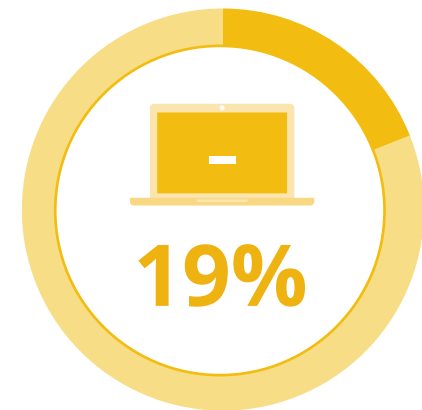
Average moms (n=390)



*I spend **less time watching videos online** than I do watching television*



*I spend **about the same time** watching videos online as I do watching television*



*I spend **more time watching videos online** that I do watching television*

Humor, music, news, and food videos top the list of video genres that moms like to watch

Genre of online videos like to watch – “like it a lot / a little”

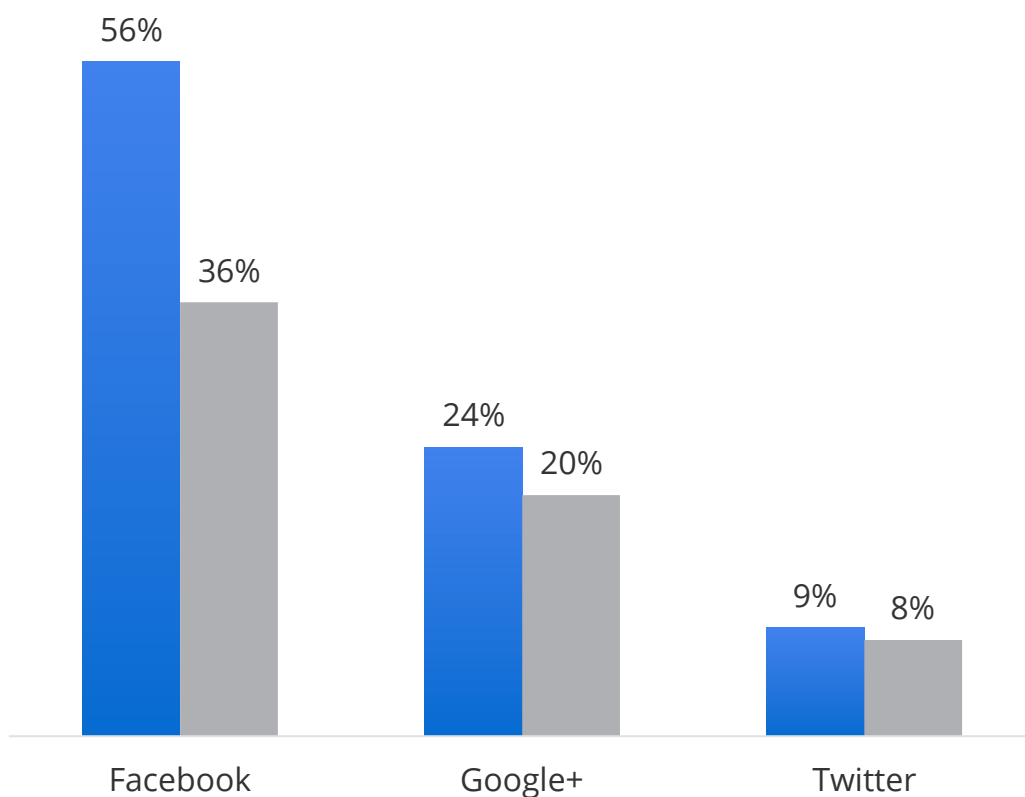
| | Average moms | Non moms |
|-------------------------------------|--------------|----------|
| <i>Base:</i> | 390 | 325 |
| Humor | 75% | 77% |
| Music | 75% | 71% |
| News | 73% | 66% |
| Food and cooking | 72% | 65% |
| Educational/“how to”/do it yourself | 69% | 61% |
| Full-length TV shows | 69% | 68% |
| Movie trailers and information | 68% | 66% |
| Family or parenting topics | 67% | 20% |
| Full-length movies | 65% | 59% |
| Weather | 65% | 62% |
| Health & healthcare | 58% | 58% |
| Product reviews | 57% | 52% |
| Beauty and fashion | 52% | 51% |

| | Average moms | Non moms |
|----------------------|--------------|----------|
| <i>Base:</i> | 390 | 325 |
| Technology | 51% | 47% |
| Travel | 51% | 50% |
| Animated | 47% | 37% |
| Celebrity | 46% | 42% |
| Consumer electronics | 43% | 45% |
| Ads or commercials | 40% | 36% |
| Gaming | 37% | 29% |
| Sports | 37% | 32% |
| Political | 27% | 26% |
| Financial related | 24% | 23% |
| Auto | 22% | 18% |
| Business related | 22% | 21% |

Social mom

Social networks help Mom access product information on categories they purchase

Top 3 social networks used to access info on product categories



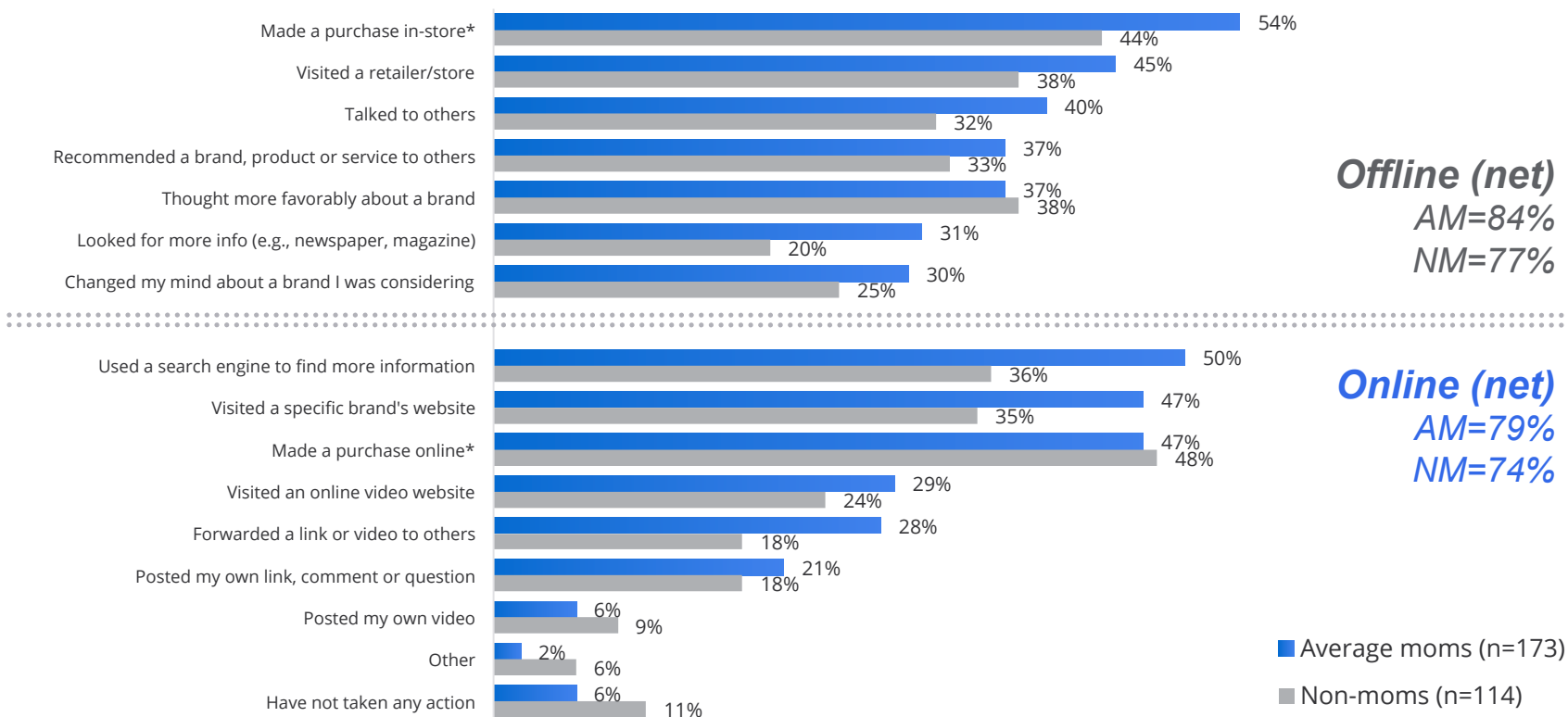
Top 5 activities on social networks while gathering product info

- become a fan of a brand* **72%**
- read reviews* **62%**
- special offer* **62%**
- follow a brand* **48%**
- commented on information* **48%**

■ Moms
■ Non moms

Resulting actions from using social networks

Nearly half who use social networks to gather info ultimately make a purchase in-store; moms are searching and visiting a brand's website more than non-moms as a result of social networks



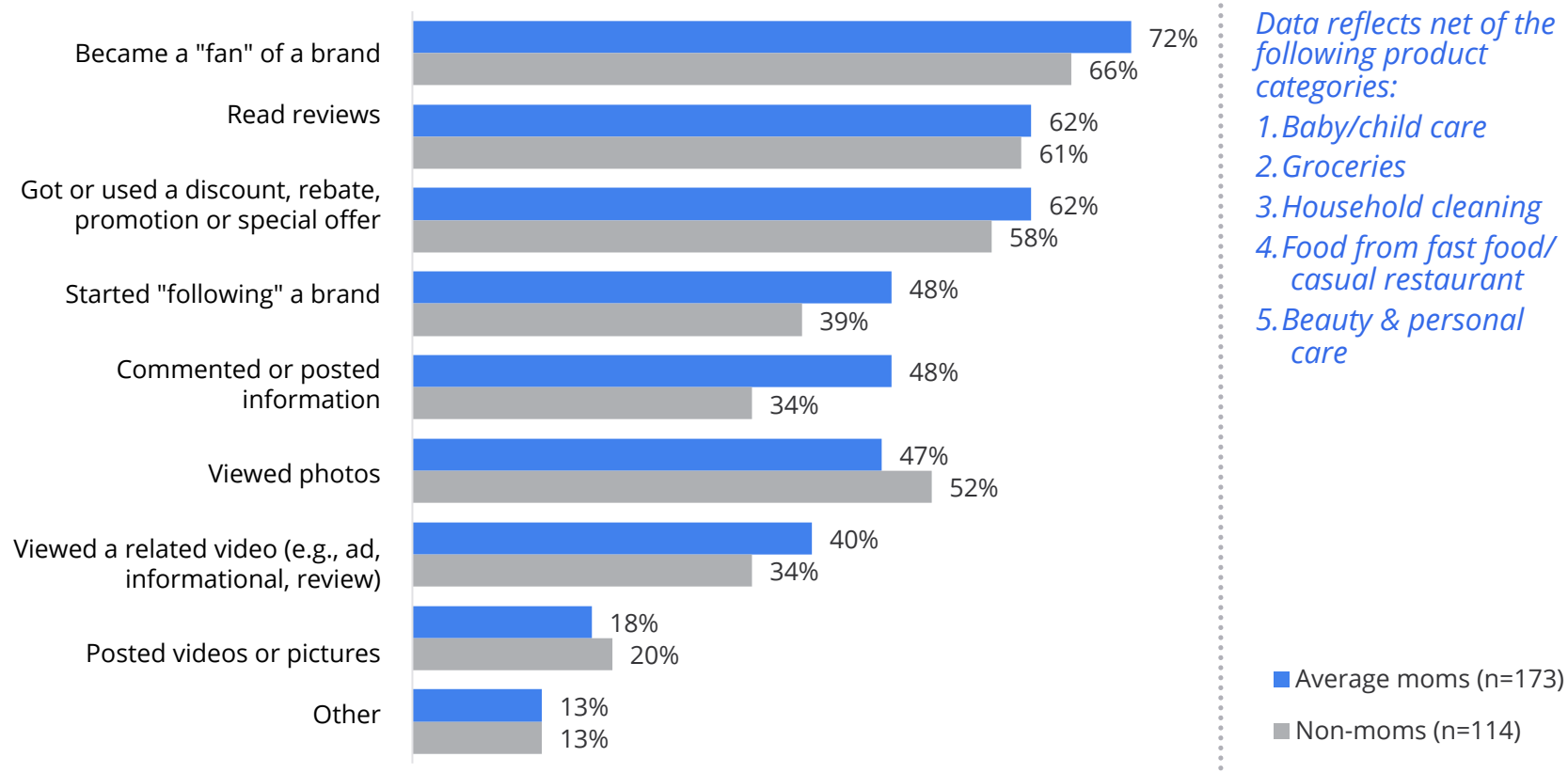
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*Made a Purchase (Net): AM = 66%, NM = 62%.

Q29: Which of the following actions, if any, have you taken as a result of gathering information on a specific category product or service for yourself INSERT IF MOM: or for your (INSERT S11 ANSWER) <INSERT IF EXPECTING: or as an expecting parent> on social networking sites (like Facebook, Google+, MySpace, etc)? Please select all that apply.

Base: Those who use social networks to access info for category of study.

Moms become "fans" of brands, read reviews, take advantage of offers using social networks



Source: Google/Ipsos OTX, Mom's Digital Path to Purchase Study, U.S., Apr 2012

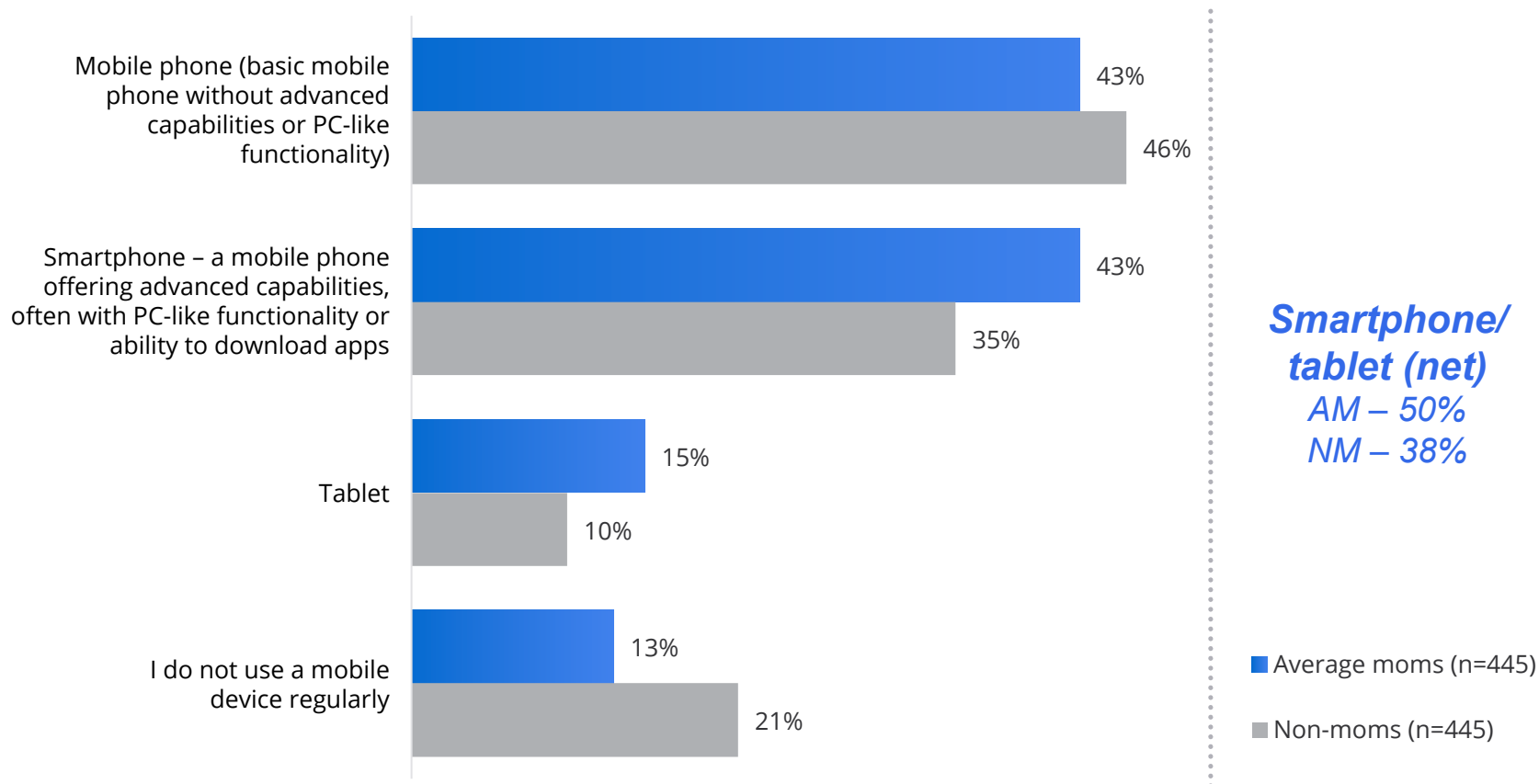
Q28: Which of the following have you done on social networking sites (like Facebook, Google+, MySpace, etc) while you gather information on each of the following product categories? Please select all that apply.

Base: Those who use social networks to access info for category of study.

Mobile mom

More moms regularly use smartphones and tablets than non-moms

Use device regularly



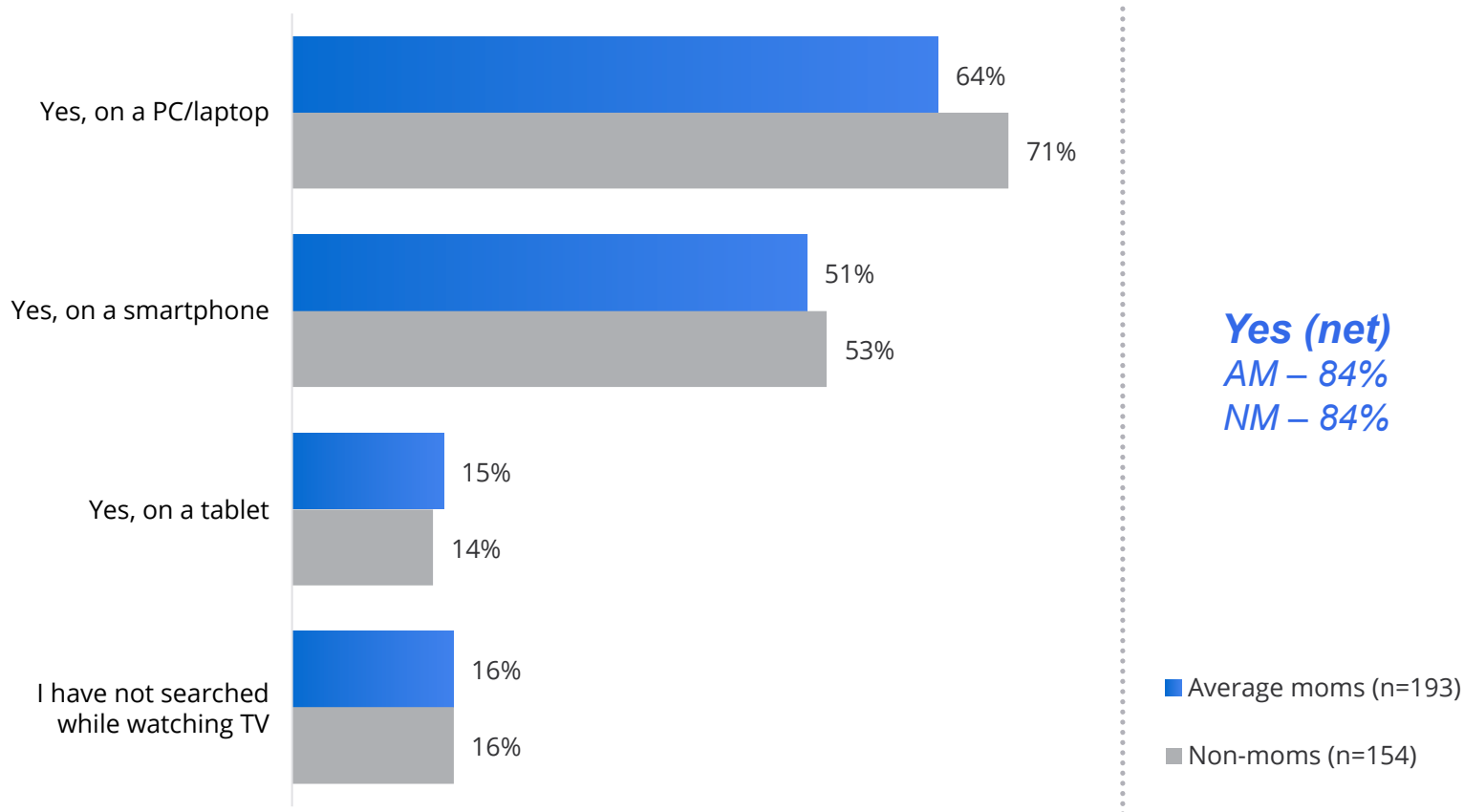
Source: Google/Ipsos OTX, Mom's Digital Path to Purchase Study, U.S., Apr 2012

Q30: Which of the following types of mobile devices, if any, do you use regularly? Please select all that apply.

Base: Total

Nearly all moms have searched on a device while watching TV

A PC is used most, but smartphone use is common as well



Moms are using smart phones on the go to find category information



58%

At home



56%

In the car



39%

In the store



30%

At the
restaurant

Top level findings

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