

Marketing to Moms

5 IMPERATIVES FOR TARGETING U.S.
AND CHINESE MOTHERS IN 2019



Contents

Introduction	03
What do we know about the modern mother? What does this tell us?	
01 Know your audience	06
Purchase drivers Persona spotlight: generational comparison	
02 Understand the journey	13
Let's talk touchpoints Joining the dots	
03 Focus on the the right channels	17
The social influence Persona spotlight: U.S. vs. China	
04 Deliver relevant and trusted content	24
The community feel Insight in action	
05 Humanize the brand experience	30
Making life easier The authentic factor	
Conclusion	35
Checklist: what to remember	
Notes on methodology	36

Introduction

The global marketing landscape has changed dramatically. Why? Because along with evolving landscapes and advancing technology, consumers have changed. With this, so has every step along the **path to purchase**.

Mothers make up some of the world's biggest target consumer groups, especially across China and America – two of the top priority markets for the CPG parenting vertical.

Despite their importance for brands, recent **research** reveals that 56% of American moms feel marketers don't understand them.

To successfully reach this cross-generational audience, it takes harnessing a deep understanding of how they're evolving.

What do we know about the modern mother?

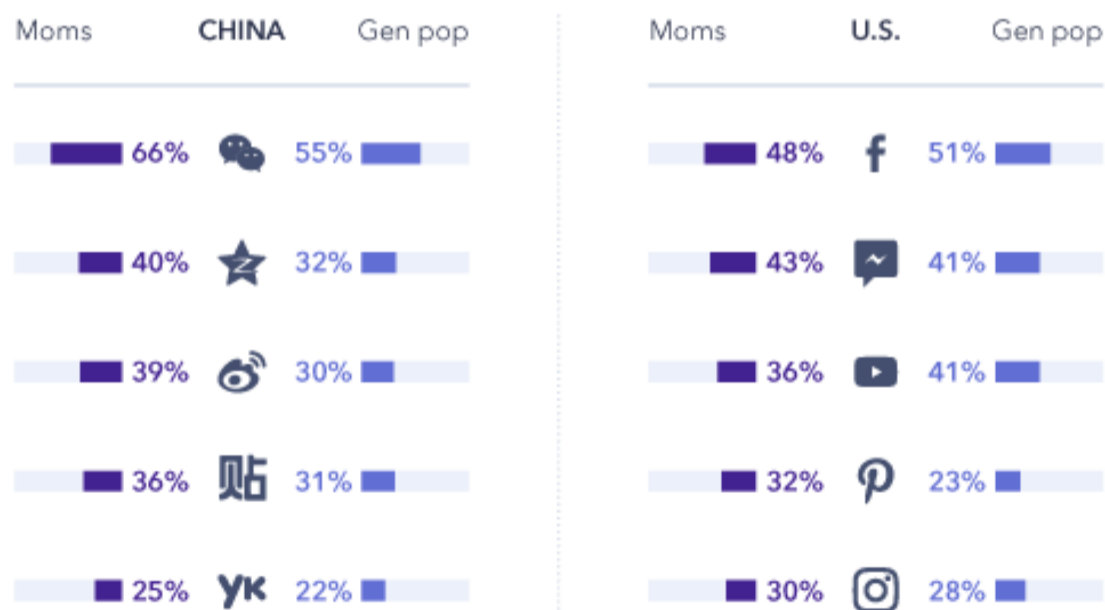
Not so long ago, it was all about the mommy blog. Mothers were starting to get more comfortable voicing their opinions online. Today, we're seeing an entirely new shift.

Keeping in line with global trends, mothers are moving to social media, actively sharing their opinions, posting reviews, and sharing tips.

They're not just connected, they're forming a global online community that's only getting bigger.

Top social platforms

% of moms vs. all internet users who are members of the following social media platforms



Source: GlobalWebIndex Study September 2018/Core Data Q3 2017 - Q2 2018

Stats roundup

- Millennial mothers are the **most active** social media users, among all moms.
- Motherhood now leads to **increased social media** usage.
- **Quality** is the number one purchase driver for mothers buying baby products.
- **61%** of new mothers in the U.S. opt in for personalized loyalty rewards from brands.
- **7 in 10** mothers-to-be in China like to stand out in a crowd.
- **35%** of Chinese moms view environmentally-friendly products as high-priority

What does this tell us?

The behaviors of today's mothers aren't the only things changing. Their preferences are changing too. We're seeing them reclaim control over their purchase journey, proactively researching products and posting reviews as part of this growing online community.

As with many others, their consumer journey has splintered and is becoming more fragmented across devices, platforms, channels and more, making them harder to reach.

The key to doing so lies in understanding this online community, and how factors like trust and quality are playing a more essential role than ever.

Our latest survey, conducted on over 2,000 mothers across China and the U.S. reveals some key imperatives to shape a winning CPG marketing strategy in 2019 and beyond.



01

**Know your
audience**

Knowing your audience in today's climate takes a lot more than understanding demographics.

As consumers take more control over the advertising they see, with **44% blocking ads online**, making meaningful connections means getting to the root of what defines them; their behaviors, perceptions, motivations, needs and interests.

For mothers, the key lies in quantifying these elements, shaping a data-driven strategy that speaks directly to them.

Purchase drivers

When we make high-involvement purchases, the risks of making a bad decision are higher.

For parents, these kinds of purchases are made a lot more often – whether it's buying food, formula, diapers or other products that will directly affect the health and wellbeing of their children.

When it comes to mothers and mothers-to-be, there are certain drivers that shine through, motivating them to make these high-involvement purchases, with quality taking a clear lead.

Quality is the number one motivator for moms purchasing baby products in both markets.

Nearly **1 in 2** new moms in the U.S. and **2 out of 3** new moms in China say they have paid more for baby food they perceive to be higher quality.

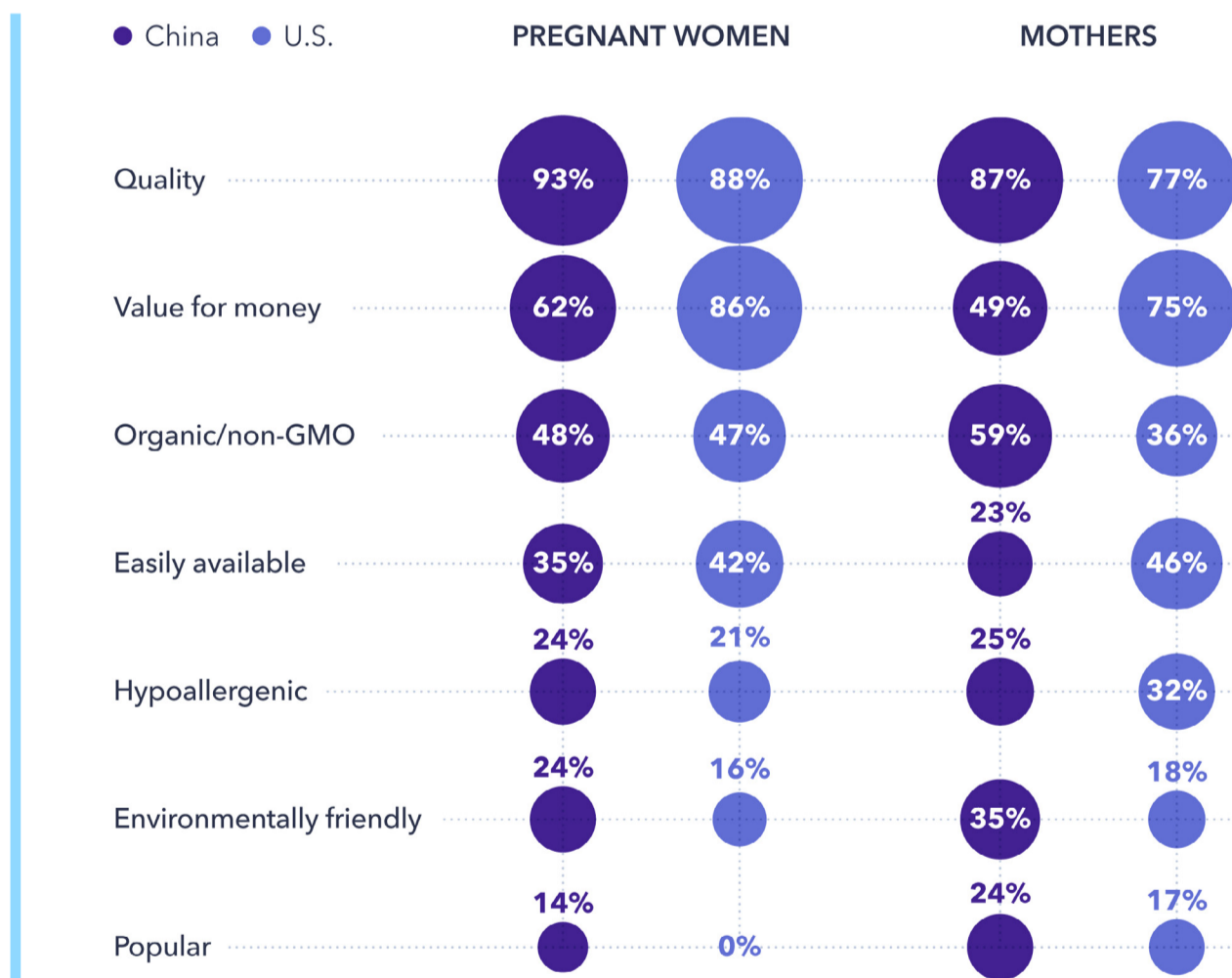
But looking closely at other motivators, some key differences become clear between Chinese and U.S. mothers, further highlighting the need for brands to dive deeper into the nuances of each segment.

Distinct markets, distinct priorities

The priority for high quality food and formula is top of mind for Chinese mothers. This reflects deep concerns over infant food safety in a market that has witnessed numerous scandals and recalls.

Quality is the #1 driver

% of first-time pregnant women vs. mothers who consider these qualities among their top 3 most important qualities when shopping for baby products



Source: GlobalWebIndex Study September 2018

With these factors in mind, it's unsurprising to see traits related directly to food origin and ingredients are especially crucial for Chinese mothers when buying for their babies.

- **59% of Chinese moms** consider 'organic / non-GMO' to be one of the most important qualities when purchasing food products for their baby. This is compared to just 36% of U.S. moms.
- **35% of Chinese moms** also view environmentally-friendly products as high-priority, compared to just 18% of U.S. moms. In contrast, top of mind for U.S. mothers are food safety standards.

While quality is still key, U.S. moms are also highly motivated by price and convenience.

3 out of 4 U.S. moms name 'value for money' a top priority when buying for baby.

Similarly, ease of availability comes through as the third most frequently named motivator for purchasing baby products, which falls to the bottom of the list among Chinese mothers.

This tells us when marketing to Chinese mothers, it's essential for your messaging to keep the focus on quality. By bringing in food origins, safety standards, and organic ingredients, CPG brands can successfully tap into the core priorities of these consumers.

In contrast, marketing efforts geared toward U.S. moms will likely be more effective if they can link more practical considerations like value and convenience, without compromising quality.

How far will moms go for quality?

Despite this emphasis moms place on quality, our research reveals a clear gap between perceptions and actions.

Pregnant women are more likely to say they would pay more for brands they perceive as 'higher quality' across the spectrum of products.

But the incidence of *actually doing* so is significantly lower for women once they've had children. This is an important consideration for brands when looking to balance their positioning of 'quality' with other key factors along the journey.

This is even more important in the U.S., where value and convenience are nearly on-par with quality as top consideration drivers.

Pregnant women would pay more for quality

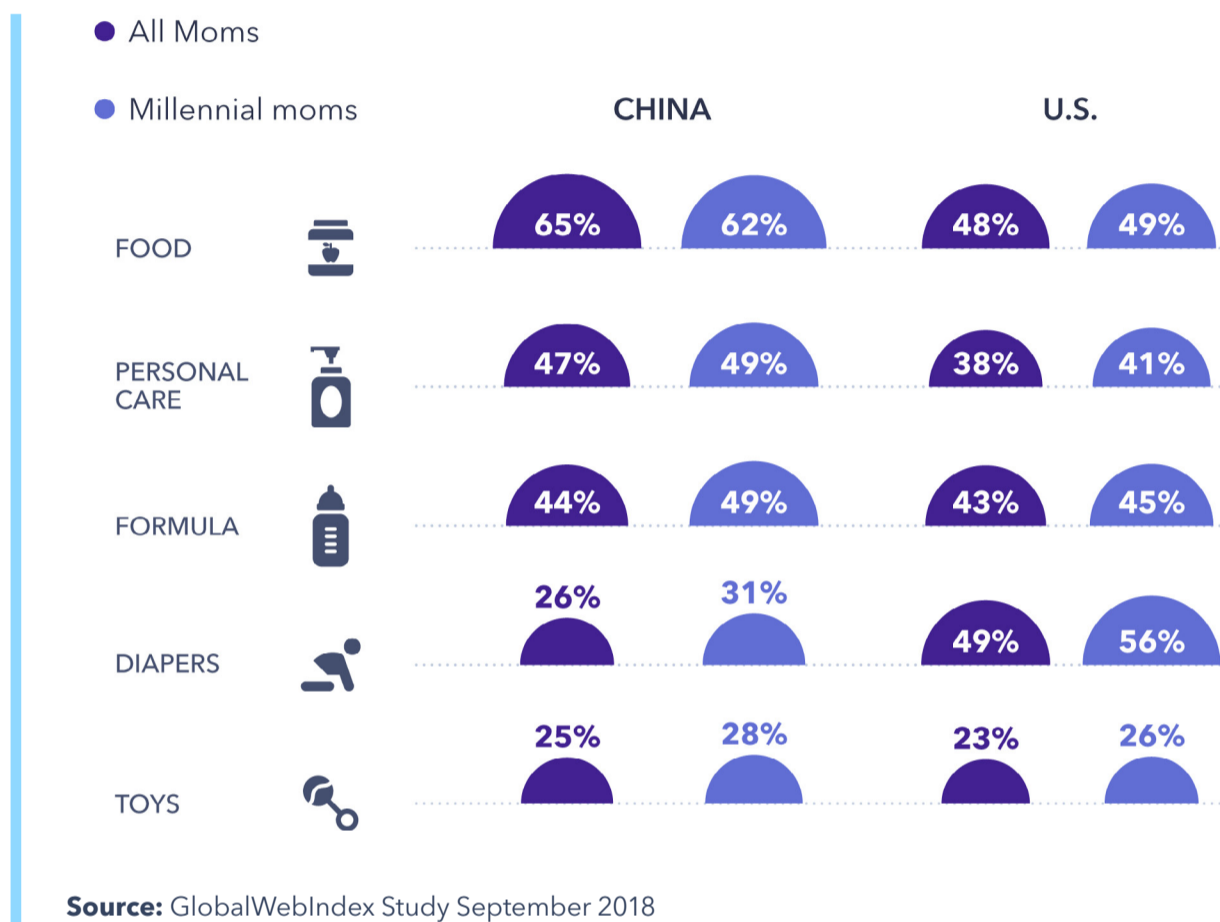
% of pregnant women who say they would pay more for a brand they perceived as higher quality



Source: GlobalWebIndex Study September 2018

The reality of paying more for quality after having children

% of non-pregnant moms who say they have paid more for a brand perceived as higher quality



Persona spotlight: U.S. millennial moms

According to recent [Pew research](#), more than a million millennials are becoming moms each year, making this an essential cohort for CPG brands to prioritize in their targeting. Our research reveals some telling differences that set these consumers apart.

For starters, millennial mothers in the U.S. are more inclined to pay for higher quality personal care/hygiene products and diapers than mothers in general.

A possible driver here is the fact that products which come into direct contact with a child's skin are increasingly coming under scrutiny in terms of quality, in addition to the traditionally scrutinized food or formula products.

This is even more evident when looking at how millennial moms in the U.S. over-index in their consideration of "hypoallergenic" as a key quality when buying products for baby.

37% of millennial moms, vs. 32% of U.S. moms overall, consider 'hypoallergenic' products a top priority.



02

**Understand
the journey**

Consumer journey maps provide a detailed overview of the customer experience and what touchpoints matter along the path to purchase.

They ensure the customer is at the forefront of your organization's mind at all times and aim to nurture long-term relationships between consumer and brand.

When it comes to marketing to moms, mapping this journey using revealing and trustworthy insight is even more crucial.

This is because modern mothers have come to expect more **personalized offerings**. They're turning to advice from family/friends, expertise from health professionals, parenting websites, online product reviews, and conversations on social media to research products and brands.

Importantly, moms are increasingly leveraging their online community for recommendations.

Let's talk touchpoints

When looking at the most influential sources of information in the purchase journey for moms, it's clear that digital channels are becoming increasingly important, especially in China.

Nearly **2 in 3 Chinese moms** are looking to recommendations from other moms on social media as part of the research process.

Close to **half of all U.S.** moms also consider social recommendations to be an influential channel.

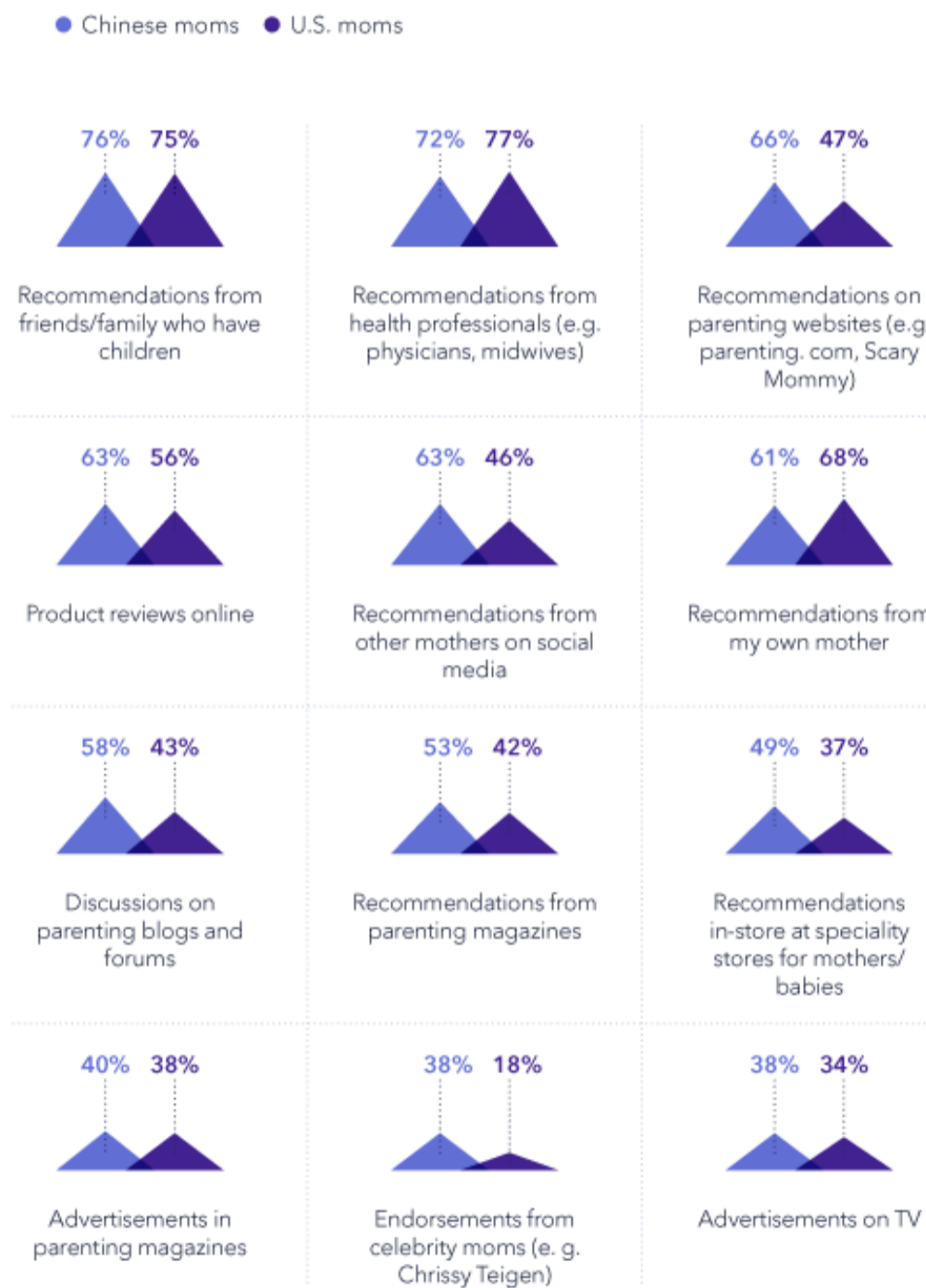
Similarly, we're seeing more dedicated online communities for moms playing increasingly important roles in the discovery phase.

Parenting blogs and forums are influential sources of information for **58%** of Chinese moms and **43%** of U.S. moms.

This is key considering social communities have now surpassed online ads, TV ads, and parenting magazines for product discovery. For brands to effectively engage modern mothers, they need to understand and tap into these communities.

Recommendations are key across touchpoints

% of non-pregnant mothers in the U.S and China who consider the following



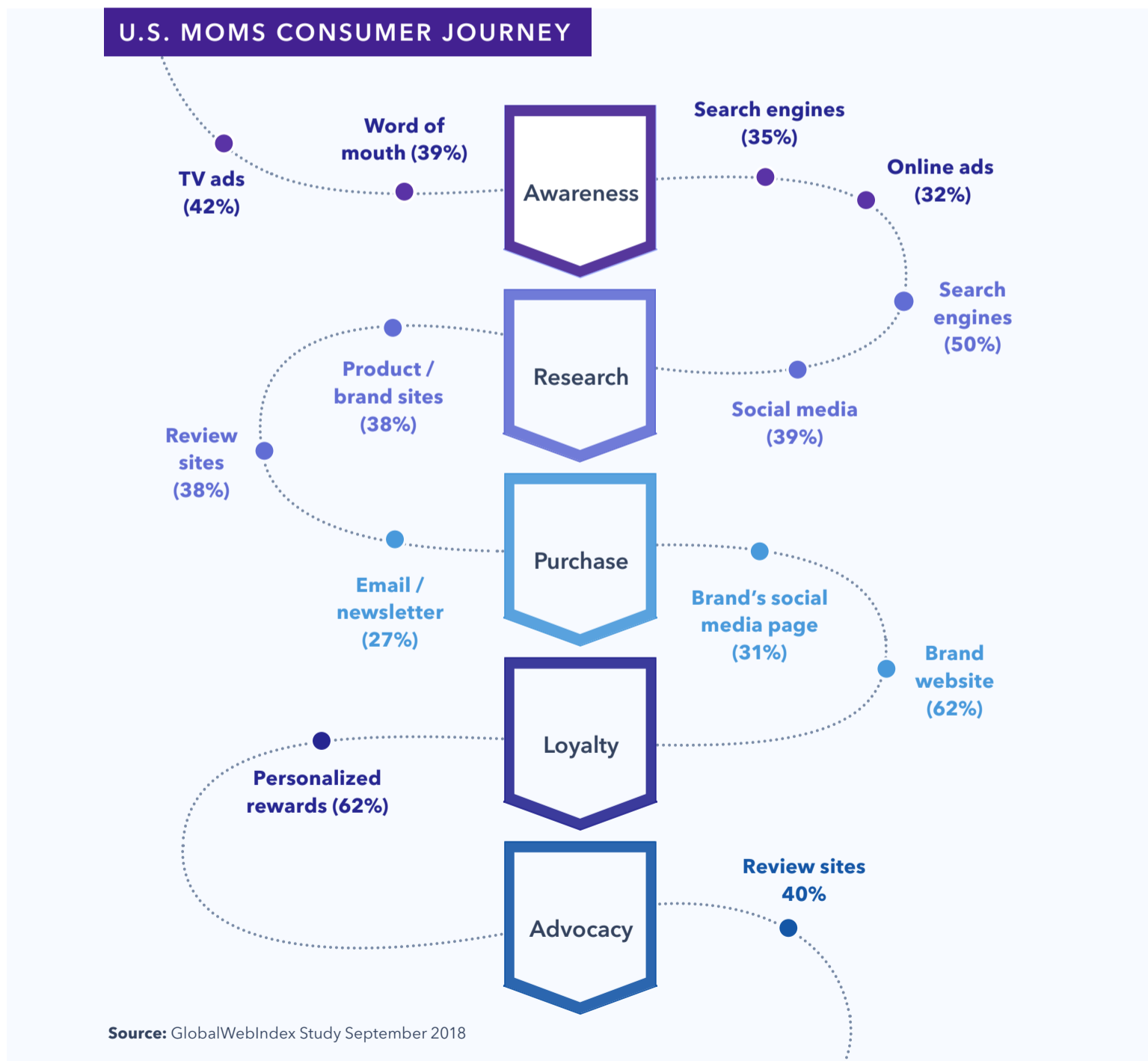
Source: GlobalWebIndex Study September 2018

Joining the dots

Marketing in today's "attention economy" means really understanding every element of the consumer journey in minute detail. But making sense of this detail and joining the dots to paint a coherent picture isn't always easy.

When it comes to marketing to moms, visualizing this journey is a fundamental step for brands within the CPG parenting vertical to engage them at the right times, in the right ways.

Here's what the typical consumer journey for U.S. mothers looks like.





03

**Focus on the
right channels**

Of course, understanding the journey and the **touchpoints that matter** at every stage is just one piece of the puzzle. For your message to cut through, it's essential to know which channels will amplify your reach and streamline your spend.

In today's omnichannel world, consumers refer to multiple channels simultaneously - for example, checking what people are saying on Twitter while watching TV, or browsing products via a laptop while messaging a friend via WhatsApp.

Our latest statistics show 87% of internet users now use another device while watching TV - a figure that continues to grow.

The social influence

For mothers, social media stands out as a key channel. Our research shows motherhood brings about an increase in social media usage.

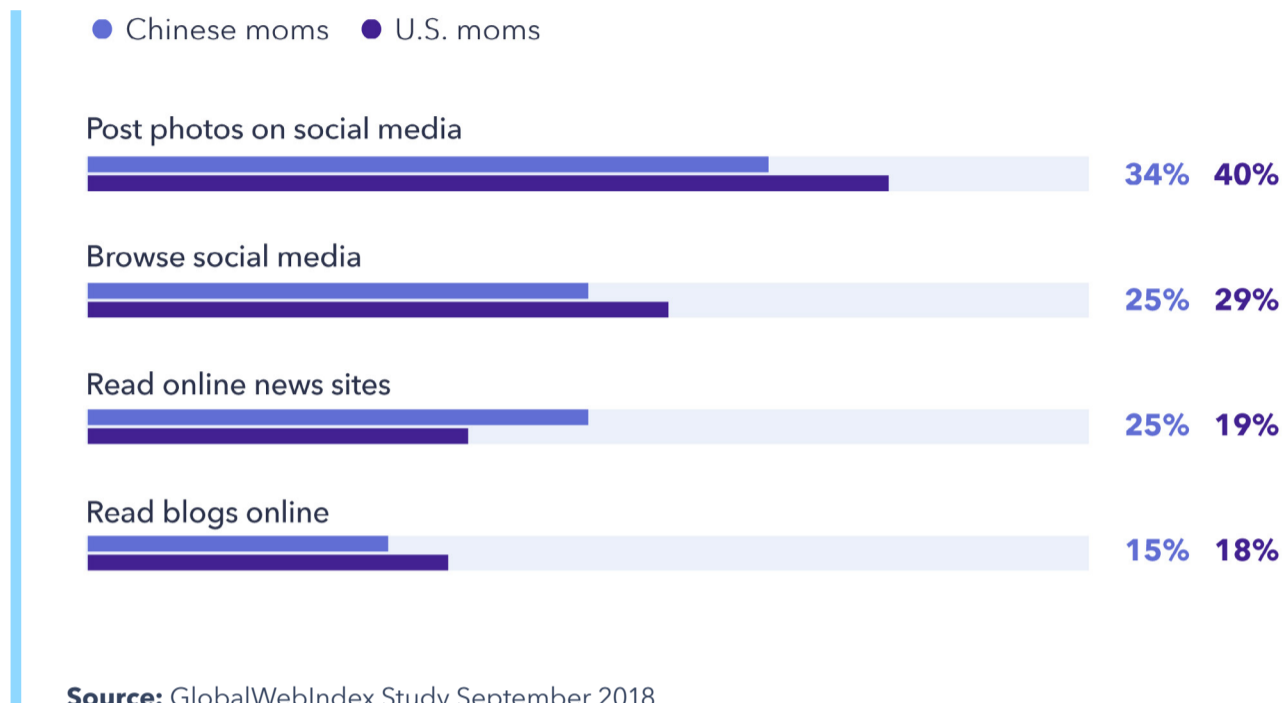
40% of U.S. moms say they post more photos on social media after having children.

This is compared to **34%** in China.

29% of U.S. moms also report browsing social media more after becoming a parent. This shows social media is becoming a focal point for mothers (and primarily new mothers) across regions in the purchase journey.

Motherhood brings a stronger social media presence

% of mothers who report using the following types of media more often after having children vs. before



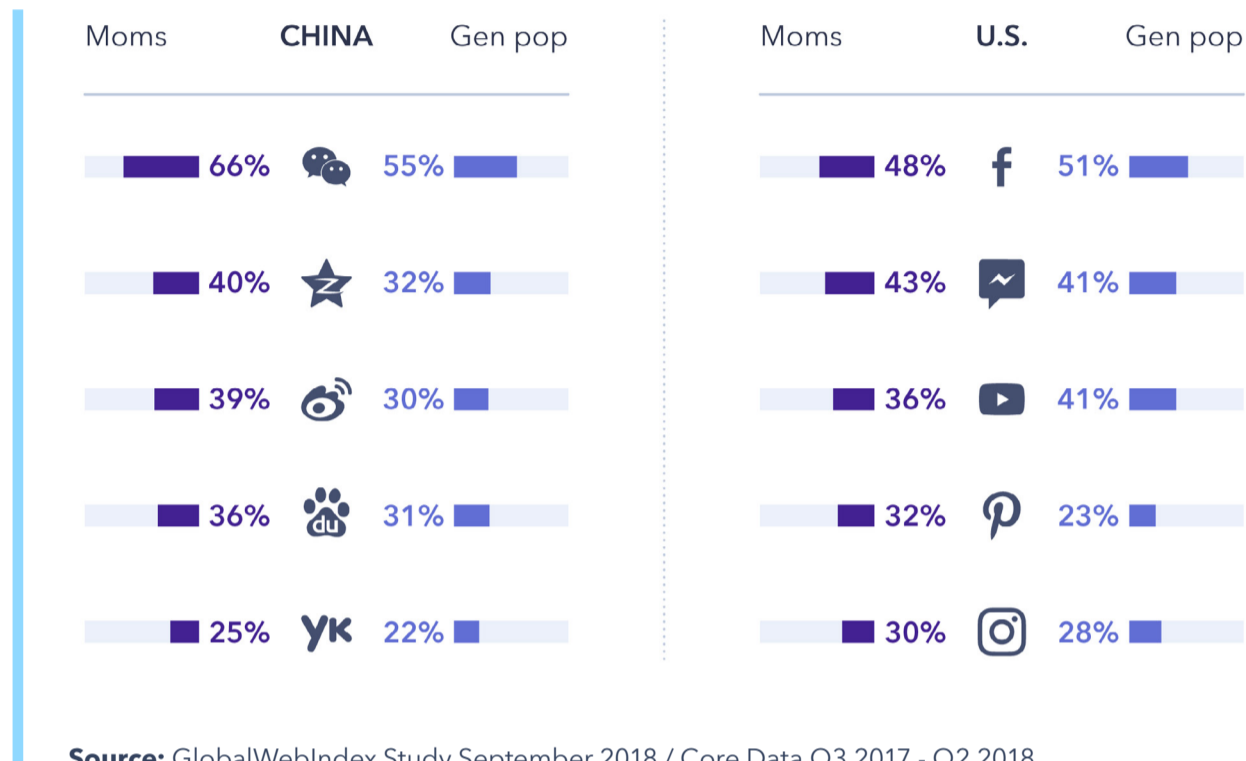
66% of Chinese moms actively use the popular social platform WeChat. This is more than the average Chinese internet user.

What's more, **48%** of U.S. moms report actively engaging with Facebook.

This highlights the need for a robust social media strategy that focuses on driving relevant content and advertising on these key platforms.

Top social platforms for mothers

% who actively engage with the following social media platforms



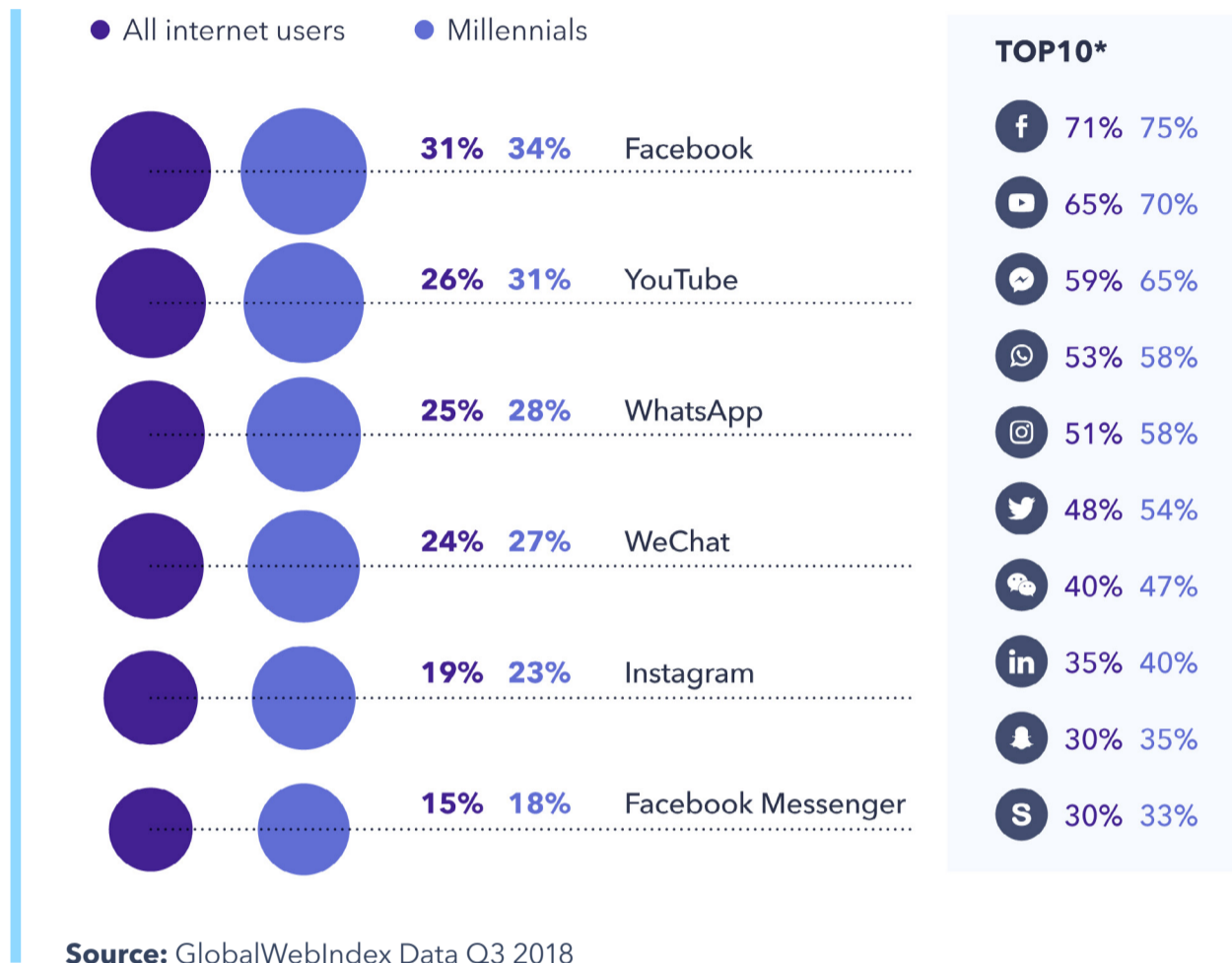
But it's millennial mothers who take the lead as the most active social media users.

Global internet users spend an average of about **2 hours and 37 minutes** on social media daily. For millennials, that average jumps to **2 hours and 53 minutes** – almost 3 hours a day.

Additionally, millennials are more likely than the average internet user to be using various social platforms multiple times a day, and are members of more platforms than most users across the globe.

Millennials use social media more than most

% who use the following social media platforms multiple times a day





From a channel standpoint, it's all about the mobile commerce opportunity. Brands need to give consumers the ability to shop on any device, in any place, at any time.

James de Lacey, VP, Head of Corporate, GlobalWebIndex



Persona spotlight: working vs. stay-at-home moms

When comparing how long new mothers in the U.S. and China are averaging per day across a range of different media, some telling differences come to the fore. The most apparent is daily time spent watching linear TV.

Broadcast TV stands out as the most prominent channel for targeting new mothers in America.

New mothers in the U.S. are averaging more than 3 hours more per day watching broadcast TV compared to their counterparts in China.

This is linked to the fact that while around **35% of new mothers** in the U.S. are stay-at-home mothers, just 10% in China are. In fact, almost **80%** of mothers with one child under the age of three in China are in full-time work.

This offers a key insight into the kind of advertising that would resonate across broadcast TV, with this channel appealing mostly to full-time new moms in the U.S.



04

**Deliver relevant
and trusted
content**

Is content still king? When marketing to moms, the answer is yes.

For these consumer groups, it's all about trust. They like to do their research when it comes to making purchases, and reputation is a key factor they take into account, reflective of the focus on quality we looked at earlier.

This tells us content plays an essential role in moving mothers along the path to purchase. Here are just some of the themes that shine through.

Content that appeals to mothers is:

Personalized

Broadly speaking, new mothers in the U.S. emerge as a very brand loyal group of individuals. **59%** tend to opt in for personalized loyalty rewards from brands, making them much more likely to do so compared to females without children. This tells us personalized content offering tailored recommendations and rewards would go along way with these consumers.

Authentic

The importance of communities among new mothers is very apparent throughout our research. It's something that impacts everything from how they research and make purchasing decisions to how they engage with technology. An essential quality of a tight-knit community is that of openness and honesty, making authenticity and transparency essential elements of a brand's content to earn their trust.

Helpful

We've seen how much mothers across both markets rely on recommendations to make purchasing decisions, whether from friends and family, health professionals, parenting or review sites. This tells us they're actively seeking advice online, which is where a well-developed content strategy that's focused on offering helpful and educational materials to mothers will make a big impact.

Credible

With the overarching focus moms across China and the U.S. place on quality, it's clear that reputation, credibility, and trustworthiness are key deciding factors in choosing one brand over another. Content that's sure to strike a chord is that which establishes a long-standing relationship between them and their consumers, who trust the produce for its focus on quality.

User-generated

Taking into account the clear preference for reviews and recommendations to research brands and products, it clearly matters to moms that what they buy is given the seal of approval by other mothers. That's why user-generated content could prove an invaluable tactic for CPG brands to tap into the community these consumers hold so dear.

The community feel

This overarching focus on community is something that needs careful consideration when marketing to moms, especially when it comes to content.

As we now know, today's moms are very open to recommendations.

More than half say that they're easily swayed by other people's opinion.

Their preference for personalized brand loyalty rewards also fits in here, suggesting moms appreciate brands that take the time to get to know them and the things they care about.

INSIGHT IN ACTION: LIDL SURPRISES

One CPG brand that stands out in this context is Lidl UK, whose 2016 #LidlSurprises campaign directly speaks to our findings, cleverly placing a key focus on quality, reputation and community.

The Insight

In 2015, a study conducted by Lidl found that 9,000 shoppers thought its products tasted as good as or better than branded rivals, but many still perceived the produce to be low quality.

The Message

Turning the brand's negative perception into a positive one, the campaign included social media and TV spots featuring unsuspecting members of the public complimenting the quality of their products, before showing surprise at the reasonable price. The big reveal was that the products were from Lidl.

Why it Worked

Portraying the brand's clear understanding of its target consumers, it struck a chord for its friendly, light-hearted tone.

Knowing its core buyers place a key focus on quality, reputation and peer recommendations, this campaign manages to tick every box through a clever use of user-generated content. This proves the power of using insight to shape a campaign that resonates with the right people.

The content of choice for mothers across markets also proves the value they place on this online community for parenting help and advice.

Our research shows that in China, the content most appealing to moms is that with a focus on food and nutrition.

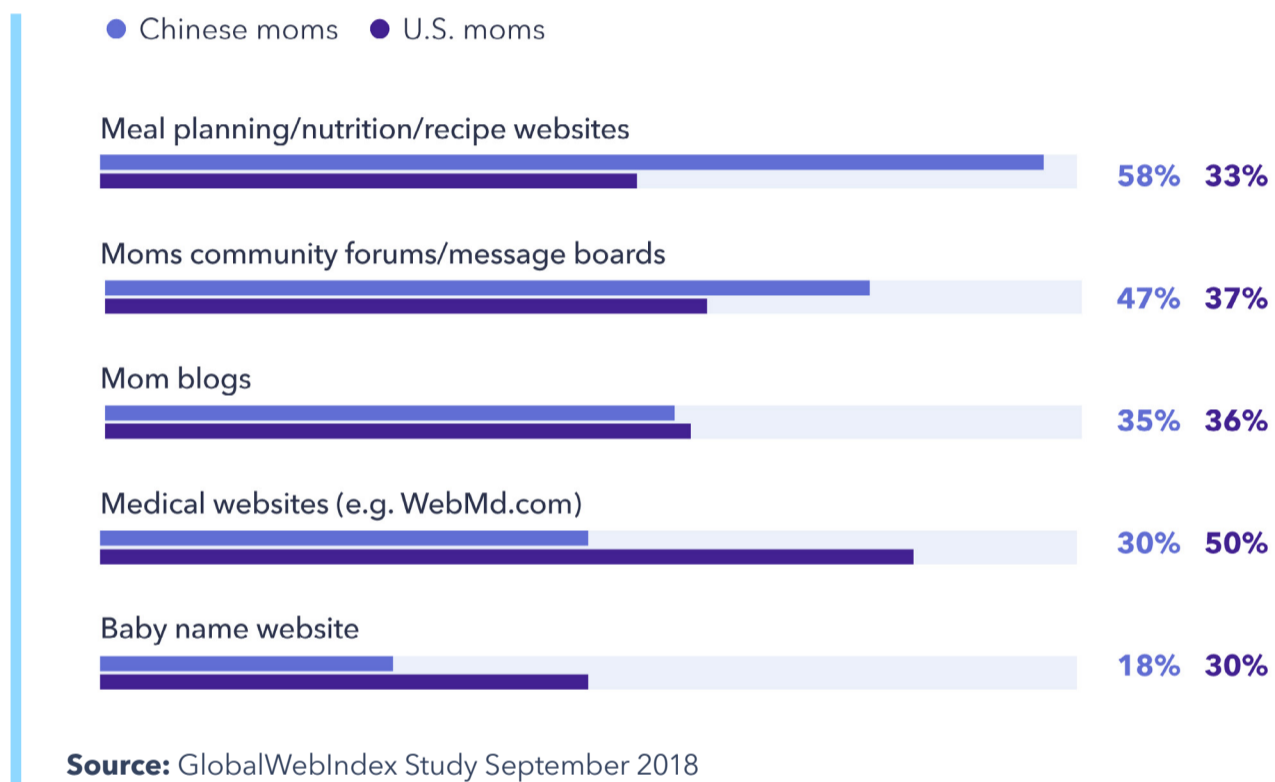
58% of Chinese moms use meal planning / nutrition and recipe websites to help with parenting needs.

In the U.S. however, moms are more likely to refer to medical websites like WebMd for help on parenting issues.

This gives us clear insight into kind of content that appeals to mothers, and where different strategies need to come into play. Medical expert may prove effective for reaching U.S. moms, for example, while food influencers may be the best choice for reaching Chinese mothers.

Top sources of content for mothers

% of mothers who report using the following types of websites to help with their parenting needs





05

**Humanize
the brand
experience**

But what stands out most from our research into U.S. and Chinese moms is the overarching need for a more humanized brand-consumer relationship.

We know this from the defining values that stand out for these consumers – trust, credibility, authenticity – and the emphasis that’s placed on community.

This tells us in order to make meaningful and memorable connections with them, it takes a consistent online and offline brand presence, and above all, a humanized e-commerce experience – starting with the following.

Making life easier

A key priority for brands here is to make life easier, in whatever way possible. A key indicator is from the continuous rise of subscription services in the parenting category.

Mothers-to-be in the U.S. are even more likely than average to display an affinity towards subscription services.

One of the biggest selling points of these services is convenience. But trust also plays a role because of perceived concerns around difficult cancellation policies and not being able to see and touch the products they’re buying.

This is particularly relevant to brands in high-touch, high-involvement categories like baby and childcare. To make their mark here, simplifying the customer experience through subscription services, while offering more transparency into the buying process, could make all the difference.



A brand is no longer what we tell the consumer it is – it's what consumers tell each other it is

Scott Cook, co-founder of Inuit



The authentic factor

But regardless of how simple you make the user experience, how relevant and helpful your content is, and how focused you are on the right channels, resonating with this audience takes more.

With mothers turning more and more to reviews and recommendations during the research and discovery phase, portraying honesty and authenticity is becoming a central ingredient in a winning brand strategy.

Authentic marketing means being open and truthful about your approach, using real people to bring your campaigns to life and make them resonate.

And with trust being a top purchase driver for mothers, transparency simply must be front and center.

AUTHENTIC MARKETING IN PRACTICE: PATAGONIA

By asking its customers not to buy its products, outdoor clothing retailer, Patagonia, knew exactly what it was doing.

Having uncovered the insight that its customers care deeply about the fact its clothes are sustainable and ethically-made, the brand decided to prove its dedication to the cause.

In 2017, Patagonia released its first-ever TV commercial, and it had nothing to do with clothes.

Instead, it aims to raise awareness around an important social issue: the protection of America's public lands.

A spokesperson for the brand said, "Whether you are a hunter or a hiker, an angler or a climber, Patagonia wants you to join them in this fight to ensure access and protection for our public lands."

Patagonia continuously presents itself, not simply as a brand that consumers can buy clothes from, but as an ambassador for key issues its consumers care about.

Conclusion

For CPG marketers in the parenting vertical, mothers make up a complex audience, spanning across many generations. But modern mothers aren't impossible to reach.

The key lies in tapping into the online community that's continuously taking precedence in the consumer journey.

It means harnessing a deep understanding of who these moms are and what really matters to them – something that can only be done with deep consumer insight that translates far more than their behaviors alone.

Checklist: what to remember

- **Social media is key.** Motherhood drives social engagement in both markets, so a strong social presence is key, especially when targeting millennial mothers.
- **Quality matters.** As the number one purchase driver for mothers in both markets, quality should form a focal point of a marketing strategy targeting this group.
- **Getting buy-in from other moms is crucial.** Moms are increasingly leveraging their online community for recommendations.
- **Relevant and trusted content goes a long way.** Mothers regularly engage with content online that offers credible and solid advice on parenting.
- **Broadcast TV is still key.** As the most effective channel for reaching new mothers in the U.S., linear TV still proves effective.

Notes on methodology

The figures in this report are drawn from two primary sources: (1) a bespoke study on online mothers conducted in September 2018 and (2) GlobalWebIndex's Core Survey. Figures taken from each GlobalWebIndex data source will be referenced as such on each chart or diagram.

GlobalWebIndex Study September 2018

We conducted a bespoke study of current and expectant mothers in China and the United States. 1,000 of these women were surveyed in each market, for a total of 2,000 current and expectant mothers across both countries. Fieldwork was conducted online between August 20th - September 17th 2018.

All figures are representative of current and expectant online mothers, rather than all current and expectant mothers. Please see the notes below on internet penetration rates across our survey markets for further information on this distinction.

GlobalWebIndex Core Survey: Our research

Each year, we interview over 350,000 internet users aged 16-64.

Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors.

We source these respondents in partnership with a number of industry-leading panel providers.

Each respondent who takes our survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

Internet Penetration Rates Across Markets

Our research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, **the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated.** This is the case throughout much of LatAm, MEA and Asia Pacific.

About GlobalWebIndex

As home of the world's largest survey on the online consumer, with data representing 2.6bn internet users across 44 countries, the GlobalWebIndex platform makes it easy to achieve personalization at scale.

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