



Essential **Baby**



Essential Baby Audience Insights

March 2013

Agenda

- Grocery buying behaviour
- Food and Recipe Inspiration
- Retail and Toy Purchasing Behaviour
- Media Usage in the GB and Retail Purchasing Cycle
- Audience demographics
- A week in the life of a typical Fairfax Metro GB mum



Agenda

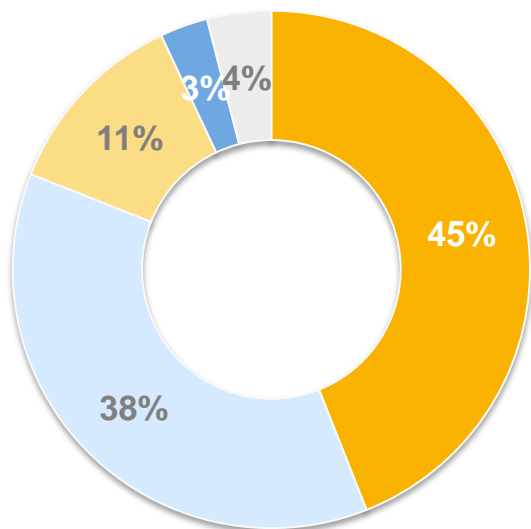
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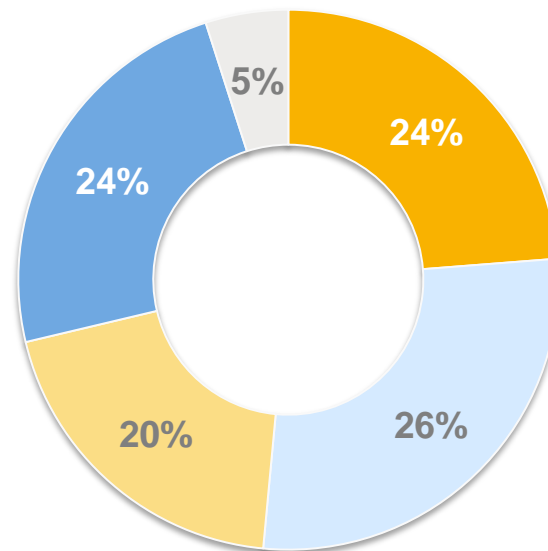
Main grocery shops at Woolworths / Coles but almost half of top-up shops at community or discount supermarkets



Main Grocery Shop

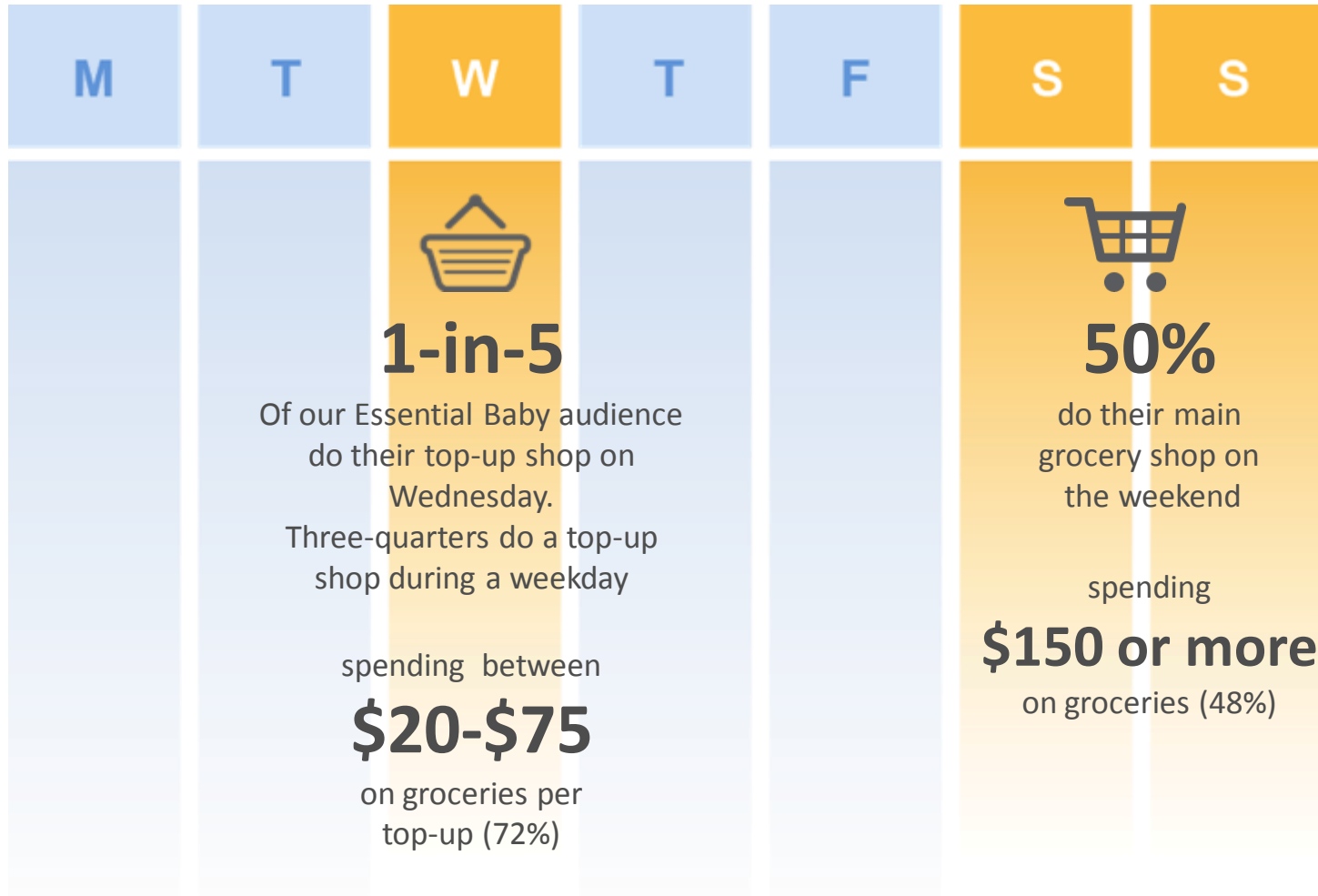


Top-Up Grocery Shop

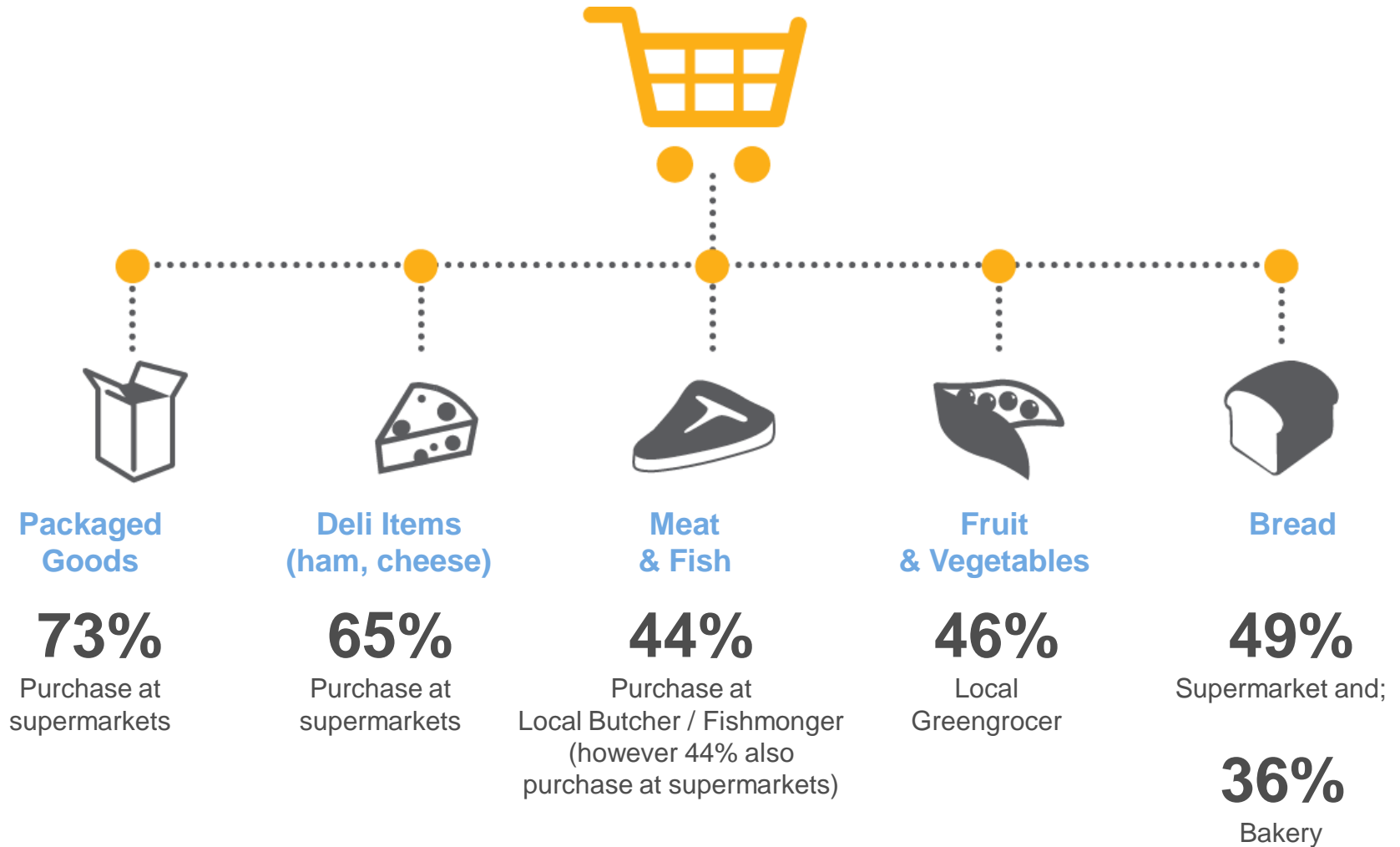


- Woolworths
- Coles
- Aldi
- IGA
- Other

Main grocery shops are done on weekends and mid-week top-up shops



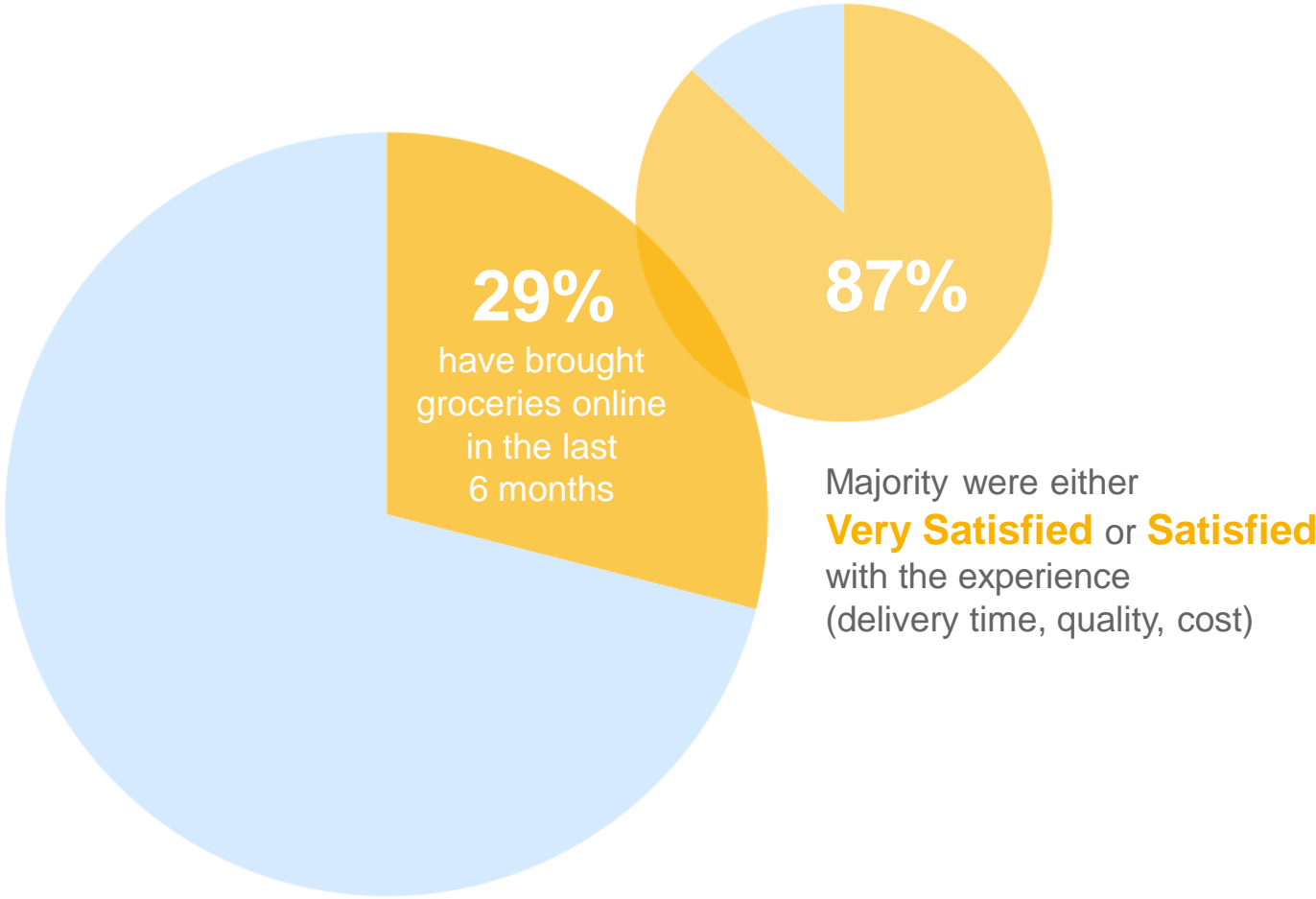
A combination of supermarket and local shopping



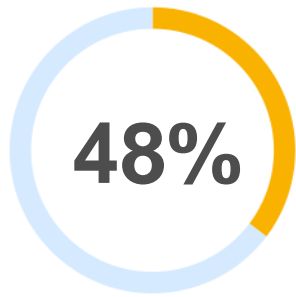
Quality and price key in selecting where to shop



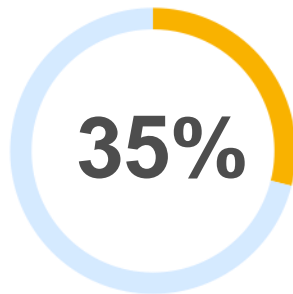
One in three of our Essential Baby visitors buy groceries online



Biggest changes in grocery buying behaviour over the last 2 years ...



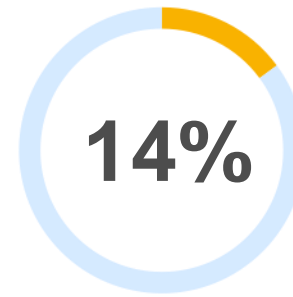
Do more top-up shops & main grocery shop has become smaller



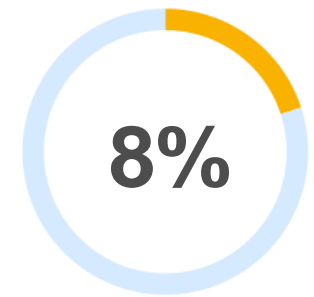
Use local specialty store more often for perishables (butcher, baker etc)



Buy more organic foods / products

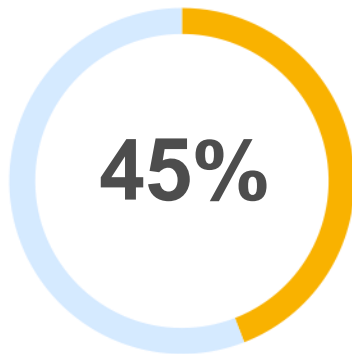


Moved shop to discount supermarkets

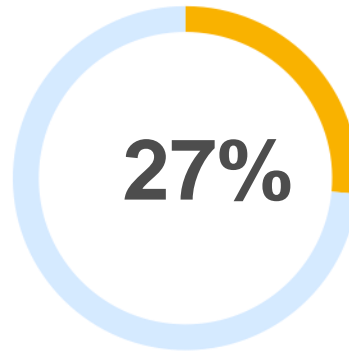


Shop more at community supermarkets

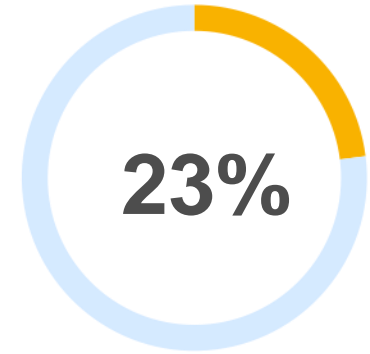
Advertising is still a key influencer in helping our Essential Baby audience decide where to shop



Advertising

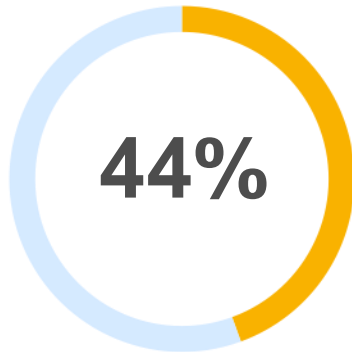


In-store staff

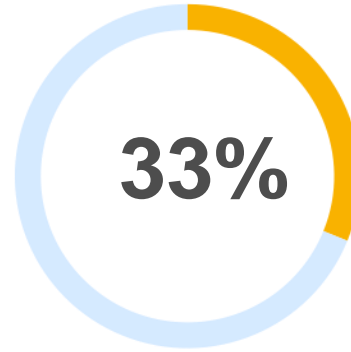


Recommended by family/friends

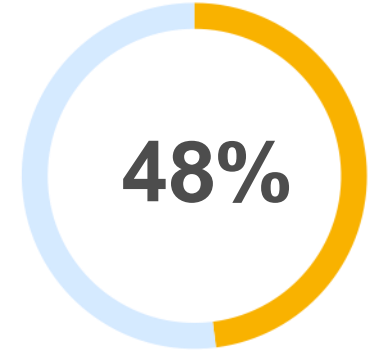
Reach an audience of high spending grocery buyers on Essential Baby ...



Buy what their household needs with **no budget in mind**

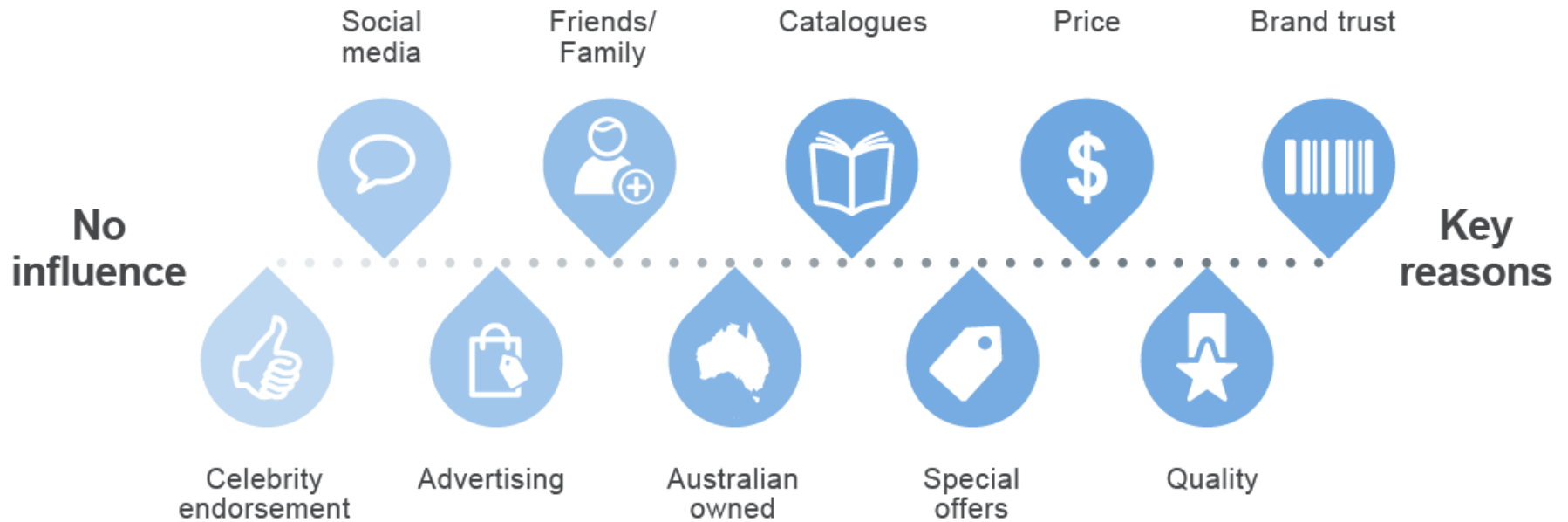


have a budget but **sometimes spend over**



spend **\$200 or more** on weekly grocery shop (main & top-up)

Brand affinity, quality and price key in deciding which grocery brands to buy



Some of our EB Mum's favourite grocery and retail brands



Nappies

Huggies
Babylove
Mamia



Baby Wipes

Huggies
Johnson & Johnson
Curash
Supermarket brand
(i.e. Woolies Select)
Mamia



Clothing

Target / Big W / K-Mart
Bonds
Cotton On Kids
Pumpkin Patch
Sprout



Toys

Lego
Fisher Price
Leap Frog

When buying grocery products for children, EB mum's look for nutritional content

	Cereals	Lunch-box snacks (i.e. muesli bars)	Juice	Dairy products	Milk	Baby formula/ baby food
Nutritional content	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Taste	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price & discounts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Value for money	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

When buying baby products, quality is most important for Essential Baby mum's

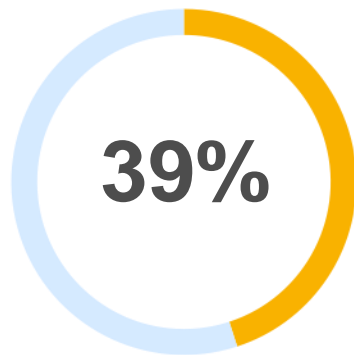
	Nappies	Baby / Wet Wipes	Bath / Baby Lotion	Baby / Drink Bottles	Toys	Clothing
Price & discounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Brand	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value for money	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Quality	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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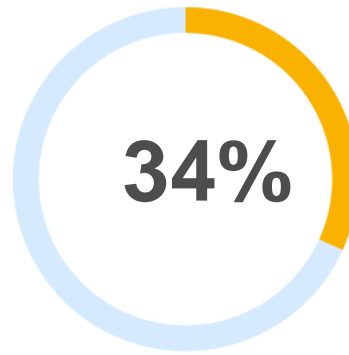
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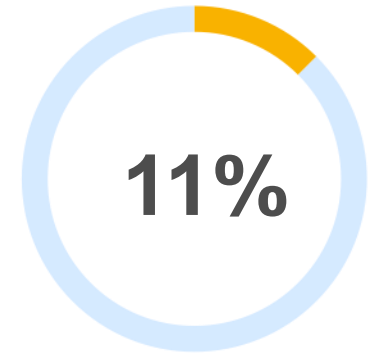
The process for a typical weeknight meal in an Essential Baby visitor's household...



Plan their weeknight meals in advance, knowing what to cook each night



Open the fridge for inspiration without much pre-planning



Go online during the day to search for recipe and buy ingredients at lunch / after work

Website and print resources the most popular in food and recipe inspiration



62% Cook books at home



50% Family / Friends



34% Cooking shows on TV / Foxtel



25% Food magazines



74% food / recipe websites



22% Food / recipe apps on mobile



21% Food / recipe apps on tablet



15% Food sections in newspaper



15% In-store

A number of platforms are used to access food and recipe inspiration



75%

Access food websites on home PC / laptop



43%

Access food websites on smartphone



42%

Read the SMH Good Food section



37%

Access food websites on tablets



33%

Read the The Age Epicure section



22%

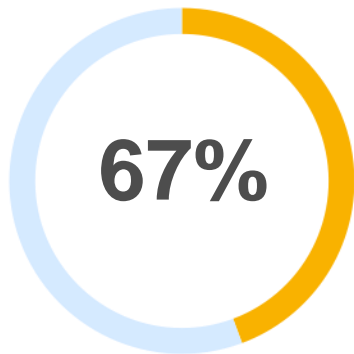
Use the Good Food site for recipe inspiration



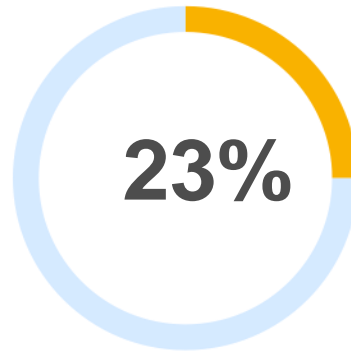
75%

Don't read any News Ltd print food section

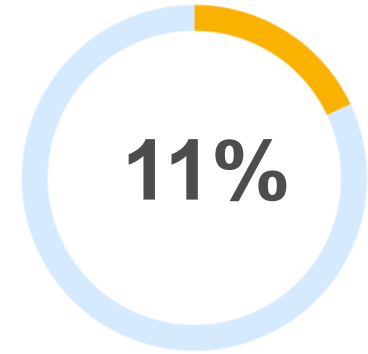
An average dinner time in the household of an Essential Baby visitor consists of ...



Both
adults and children
eat the **same meal**
together at the
same time



Prepare a
child-friendly meal
eaten **earlier** than
the adults of the
household



Separate meal
is made for the children
but eaten at the
same time
as the adults

Fruit and savoury foods are the most common 'lunch-box' snacks given to children by EB mum's



61% Cheese



59% Savoury biscuits
(i.e. Cruskits, Salada)



37% Small box of
dried fruit



36% Muesli bars



92%
Piece of fruit



19% Cereal bars



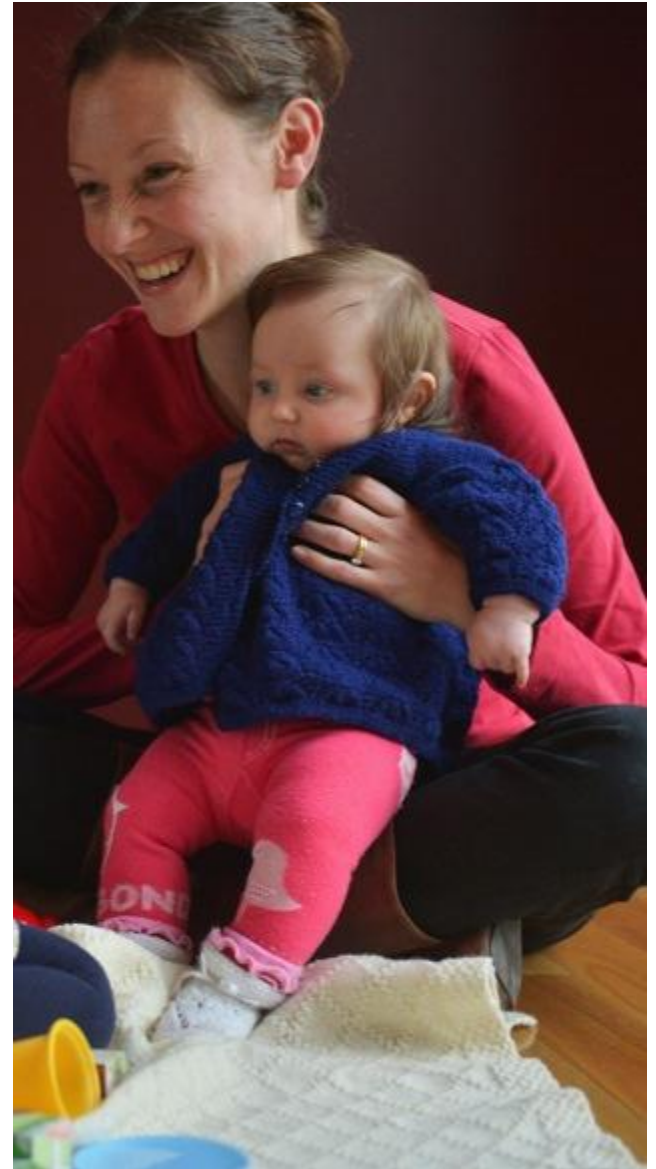
15% Sweet /
chocolate bars



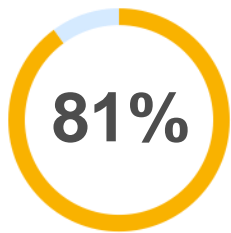
12% Potato chips

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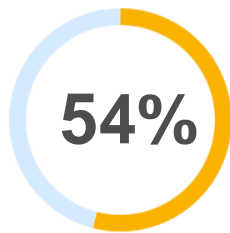
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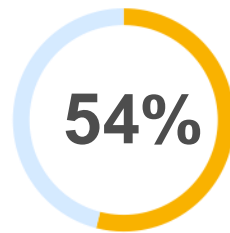
A number of shopping channels are used when purchasing children's and baby clothing



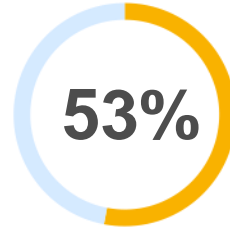
Target



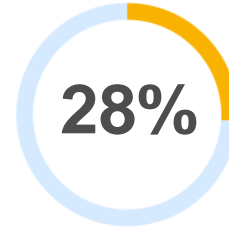
Big W



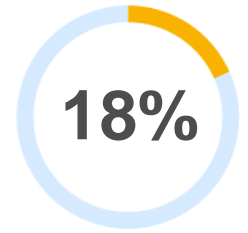
Retail Store
(i.e. Pumpkin Patch,
Cotton Kids etc)



K-Mart

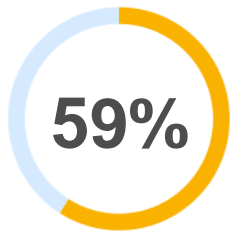


Myer

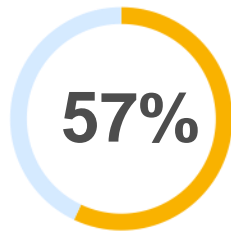


Online

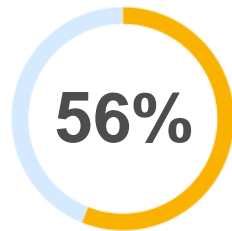
Online is a popular channel for purchasing toys



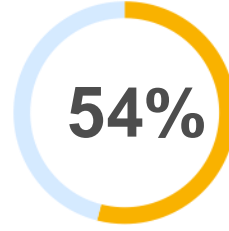
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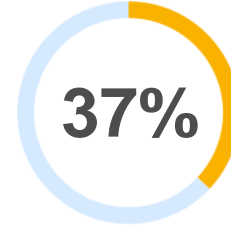
Big W



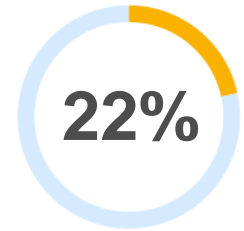
K-Mart



Online



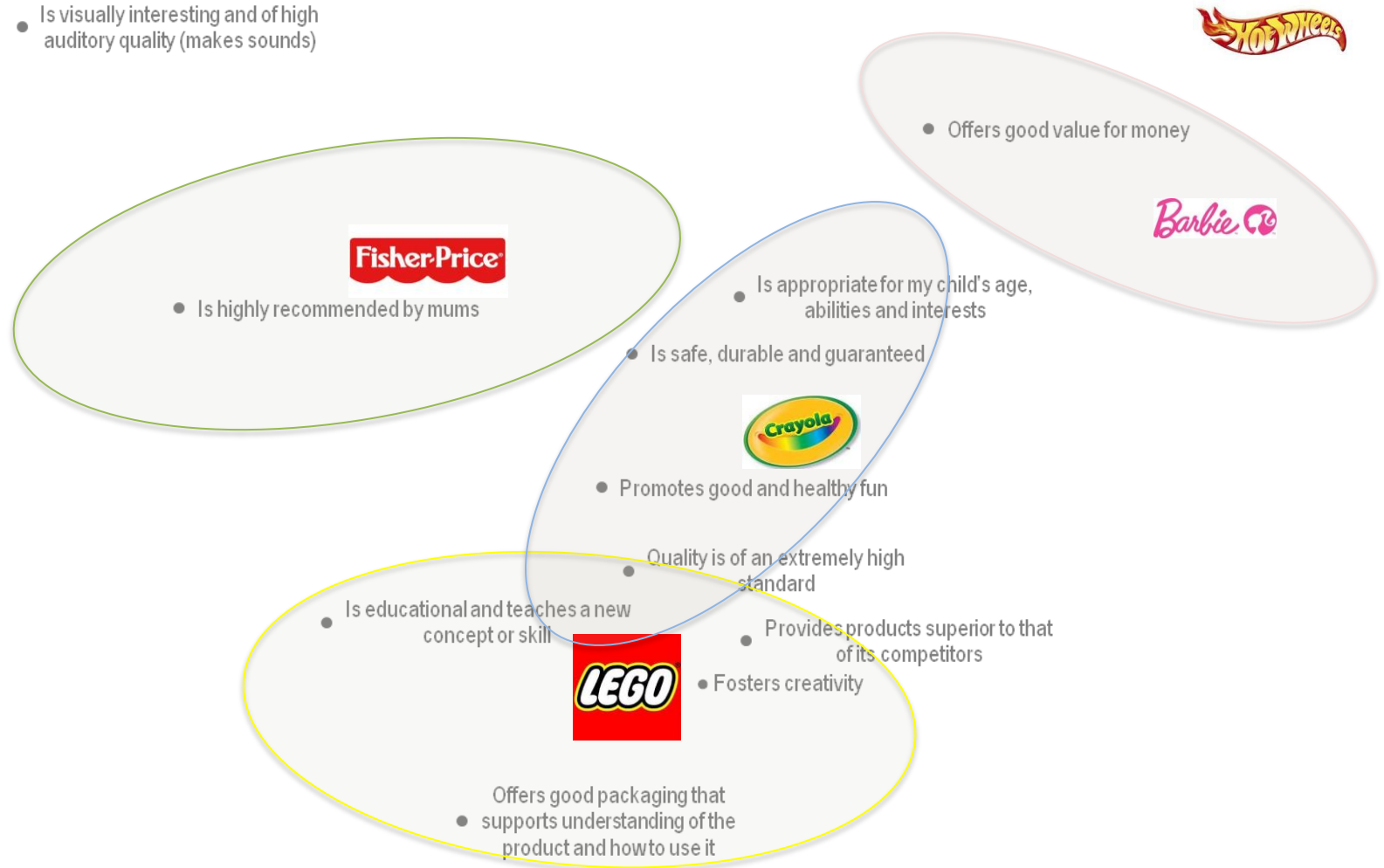
Department Store
(i.e. Myer, David Jones)



Specialist toy store
(i.e. Toys R' Us)

A clear differentiation of toy brands

- Is visually interesting and of high auditory quality (makes sounds)

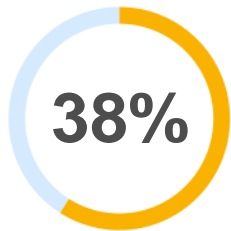


Toy buying behaviour of our Essential Baby mum's

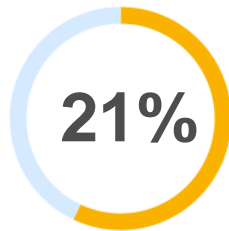


\$200 - \$750

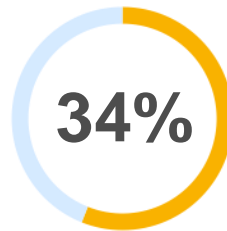
or more spent on toys every year



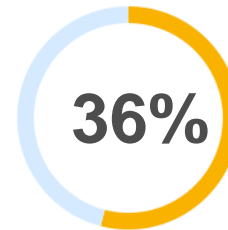
Actively seek toy sales out on a regular basis



Spend between \$100 - \$200



Purchase toys regardless of whether on sale or not



Spend between \$200 - \$400



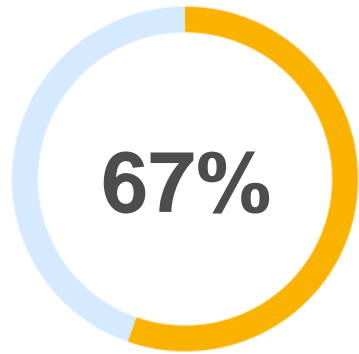
Spend \$500 or more

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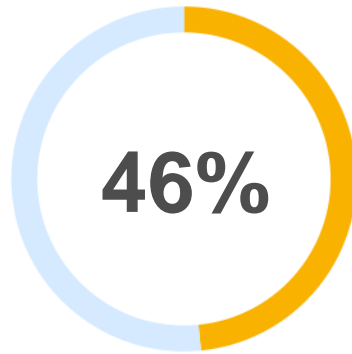
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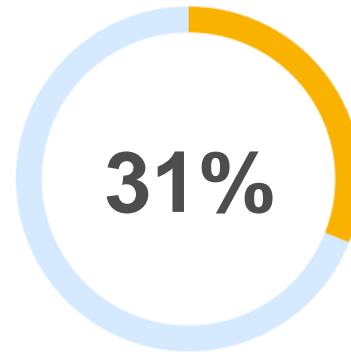
High ownership levels of mobile devices



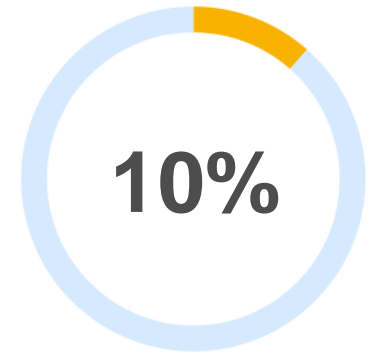
Apple iPhone



Apple iPad



Android Phone
(i.e. Samsung Galaxy)



Other tablet device
(i.e. Samsung
Galaxy Tablet)

The Essential Baby audience are confident in their mobile device usage in the path to purchase



Of the Essential Baby audience ...



68%

Located a store



64%

Took picture of a product



54%

Researched products



53%

Sent pictures to family/friends



43%

Compared products



39%

Compared product prices at different retailers



31%

Purchased product



49%

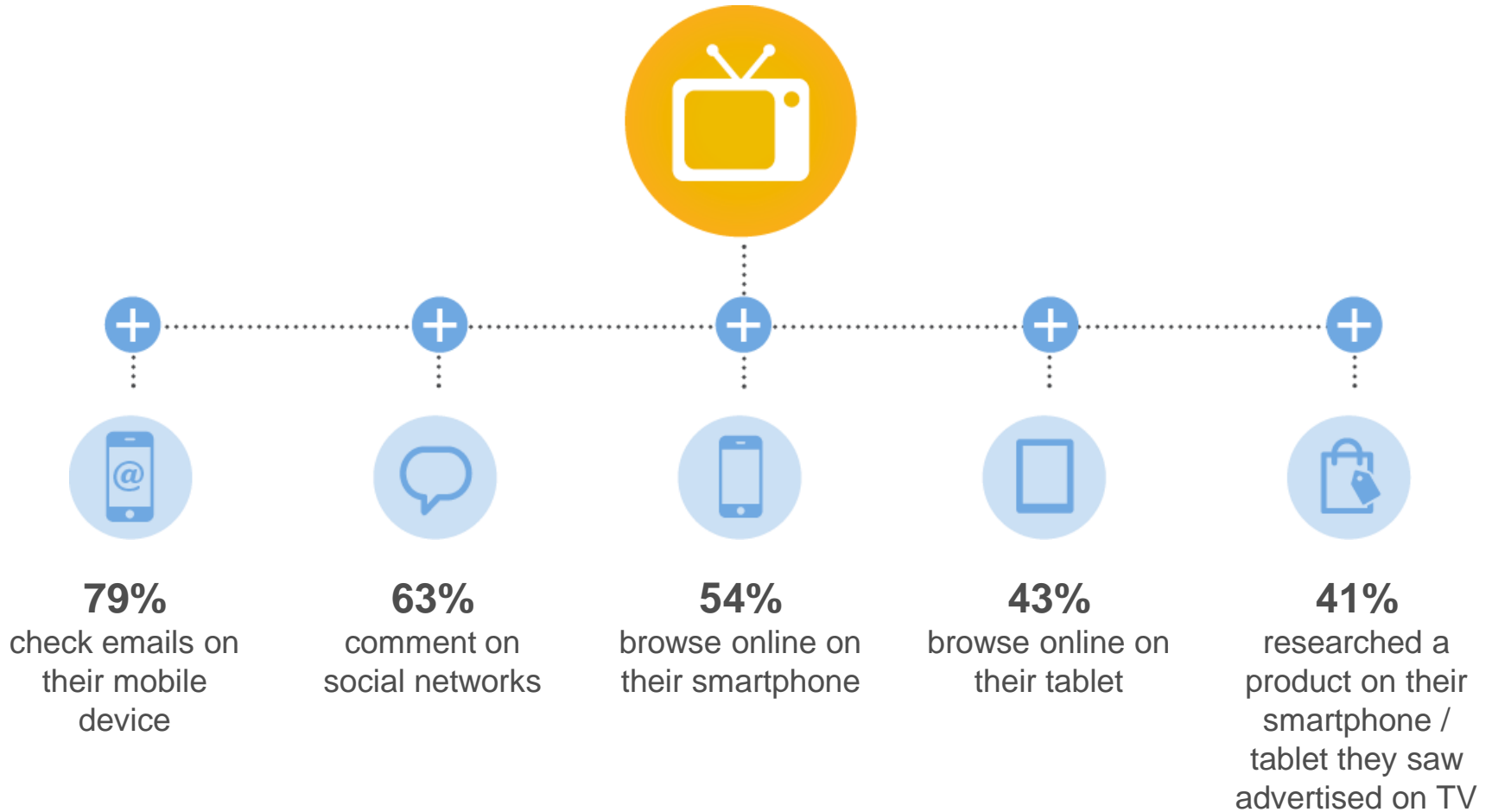
Found or consulted a recipe



49%

Consulted a shopping list

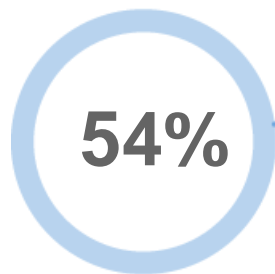
Almost half of the Essential Baby audience engage with their mobile device while watching television



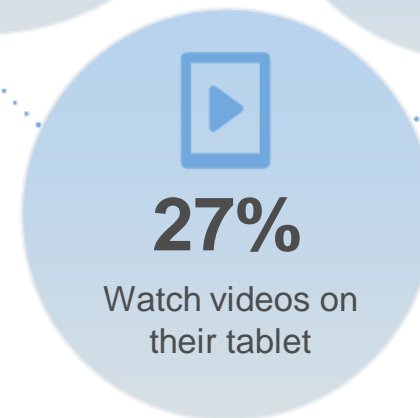
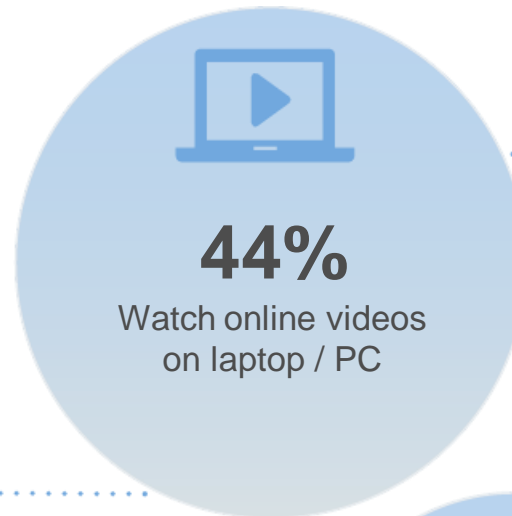
Over half of the Essential Baby audience consume online video

Entertainment
News
Lifestyle
Food / Recipes

most popular as short snippets (70%)
or long form content (22%)



Of the Essential Baby audience watch online videos

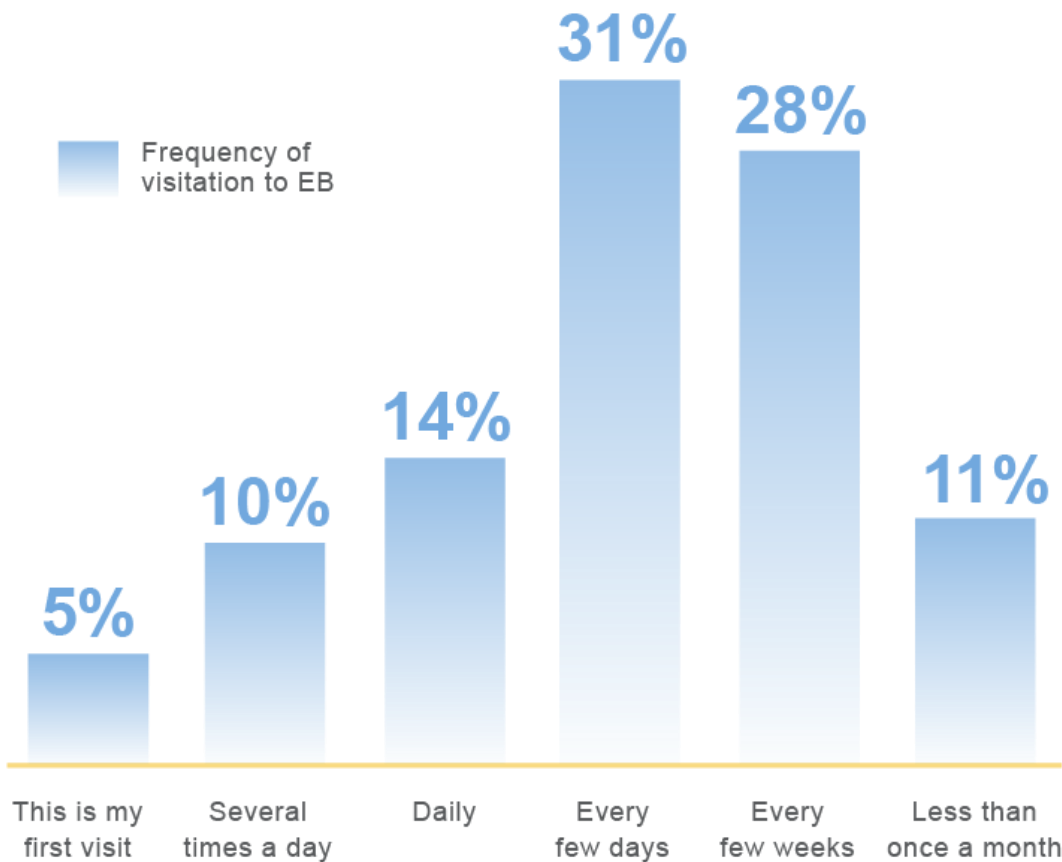


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A frequent and loyal audience



76%

of our audience use Essential Baby as an information source for a variety of topics

47%

visit Essential Baby for parenting advice

28%

to obtain product and brand recommendations for children's products

Forums the most visited section on Essential Baby

44%

of the Essential Baby audience
do not visit kidspot.com.au



Birth 10%



Conception 9%



Being dad 4%

56%

do not visit
www.bubhub.com.au



Lifestyle 38%



Competitions 46%



Forums 50%

75%

do not visit
mamamia.com.au



Baby 32%



Toddler 36%



Pregnancy 21%

Household structure of the EB audience

31% 

36% 

19% 

86%

Of the Essential Baby audience have children; **18%** are trying to conceive or currently pregnant

63%
Have children aged 0-2 years

46%
Have children aged 3-5 years

27%
Have children aged 6-9 years; and 17% have children aged 10 years+

Reach a quality audience of engaged parents

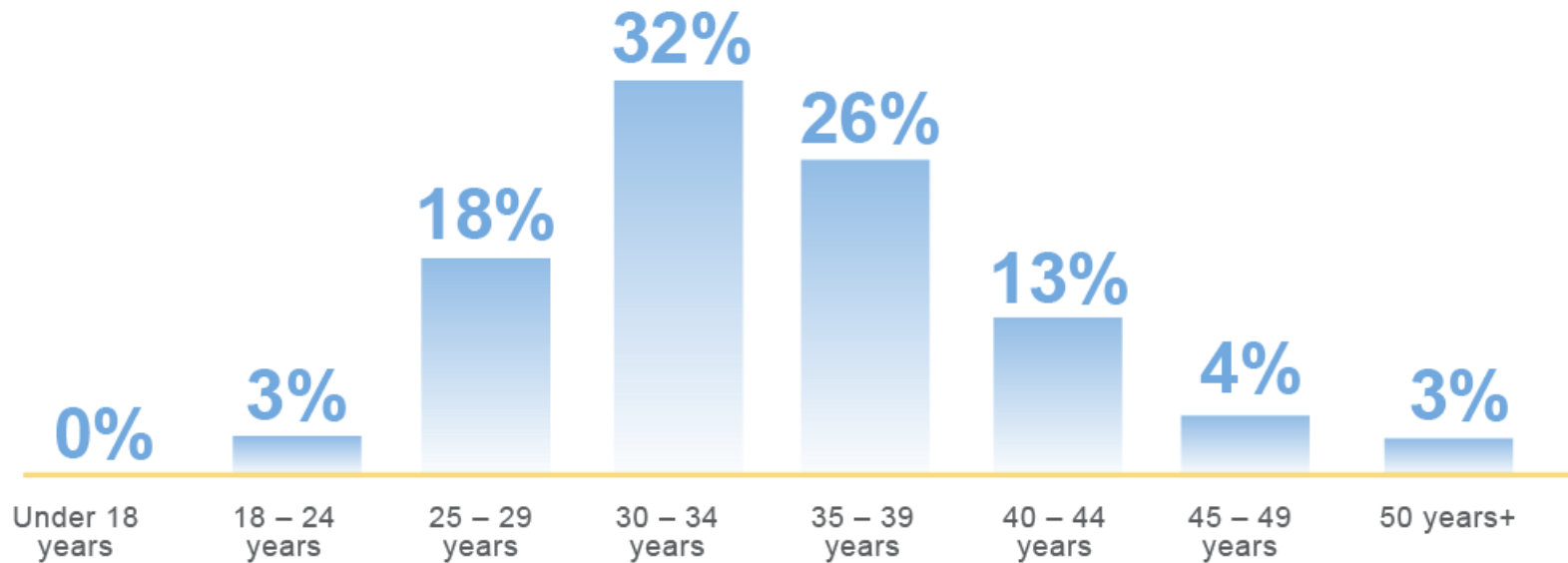


Paid full time or part time work: **58%**

Household income of \$100k+: **32%**

Professional / Manager: **58%**

NSW (**38%**), VIC (**26%**), QLD (**15%**)

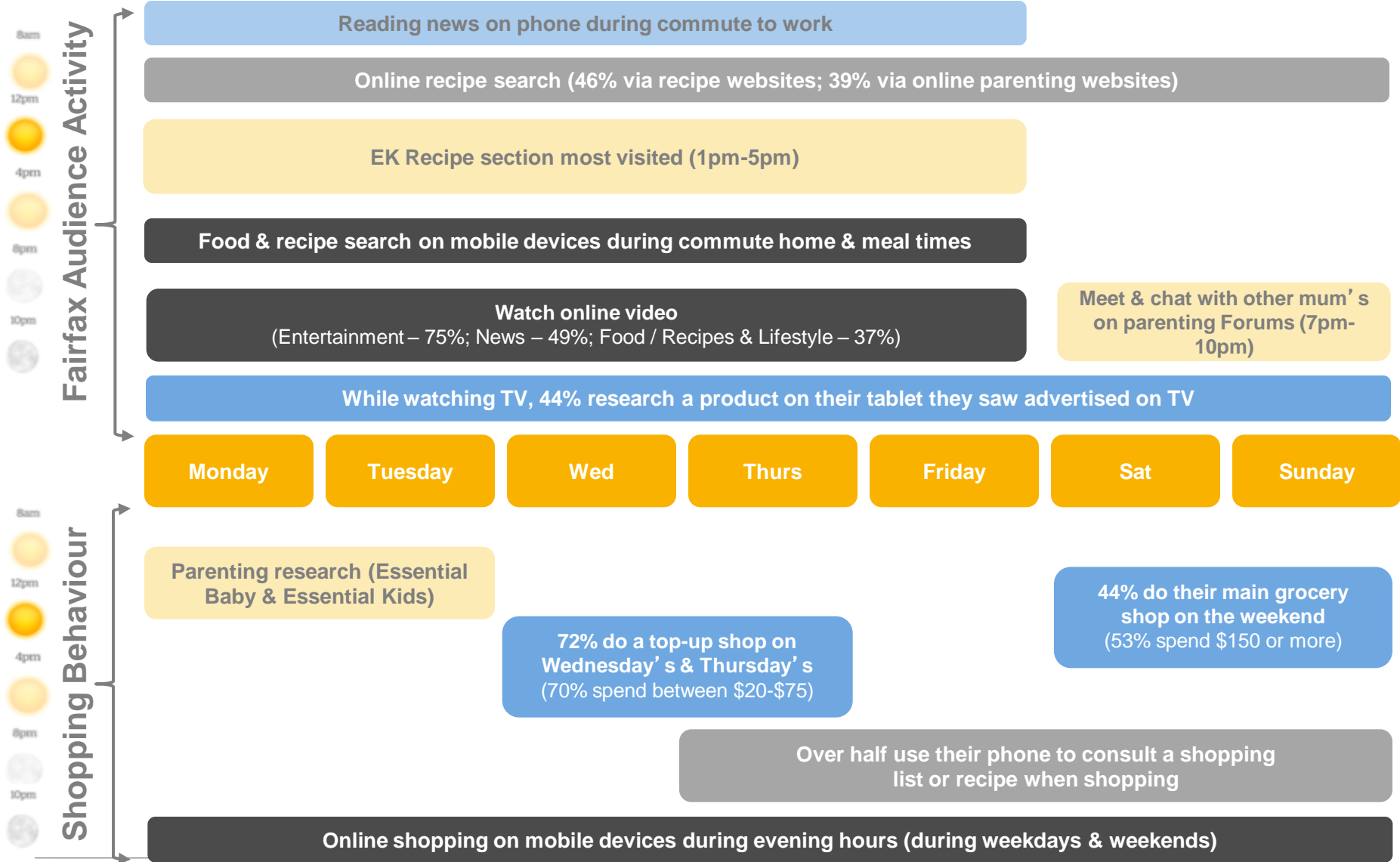


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A week in the life of a Fairfax Metro GB Mum



Sources; Fairfax Media Essential Baby Survey February 2013; Nielsen Fairfax Daypart Report May 2012; Fairfax Media Mobile Survey August 2012. Nielsen Market Intelligence, total domestic traffic.

Essential Baby

Appendix

Research Methodology

- The survey was designed by Fairfax Media and fieldwork was conducted by Fairfax Media in February 2013 for a 2 week period
- Survey respondents were recruited from within the Essential Baby website and Essential Baby Facebook page
- Respondents were asked to fill in a 45 question survey and went into the draw to win one (1) of two (2) Apple iPad Mini's
- A total of 1,121 responses were gathered