

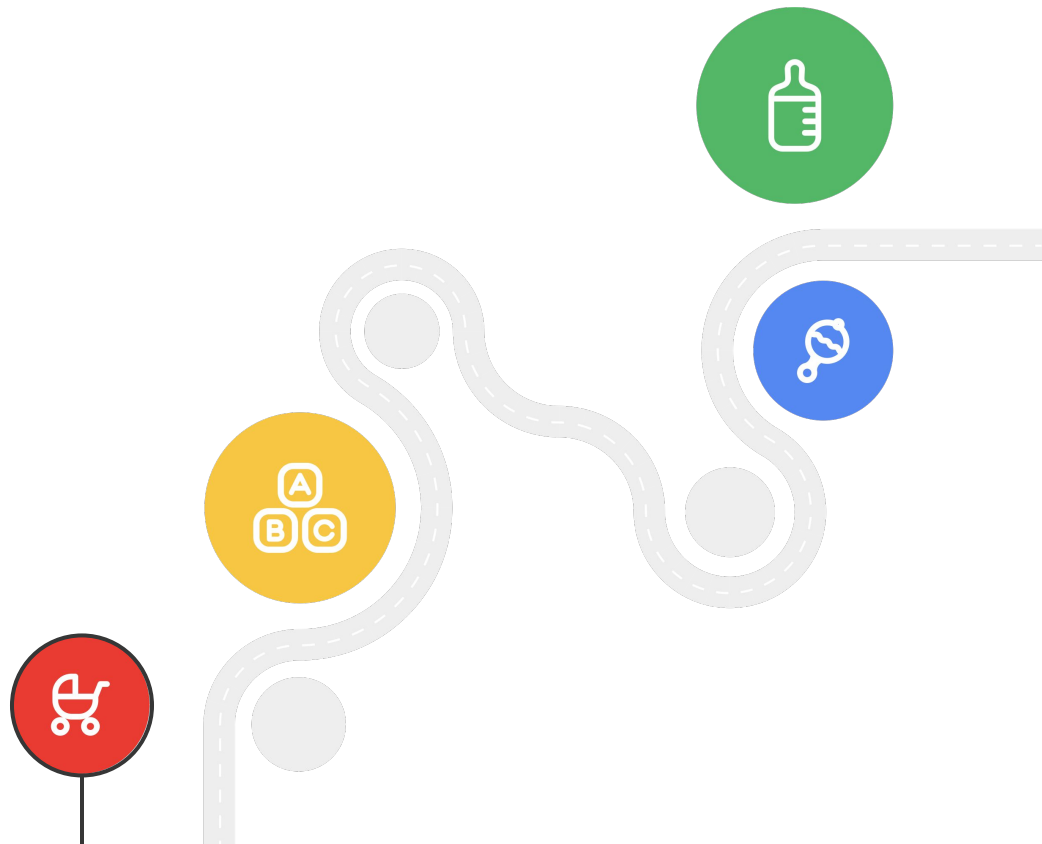


Path to Purchase Insights - APAC

Baby Care

KANTAR TNS /Google

March 2017





● **Google helps you put human intent at the center of your business:**

Research covering 14 countries, 17 industries

● **The consumer's mind is a competitive space:** 94% start off with several brands (2.8 on average) in mind when they first start thinking of a purchase. And even when they have a preferred brand, nearly a third are open to new brands

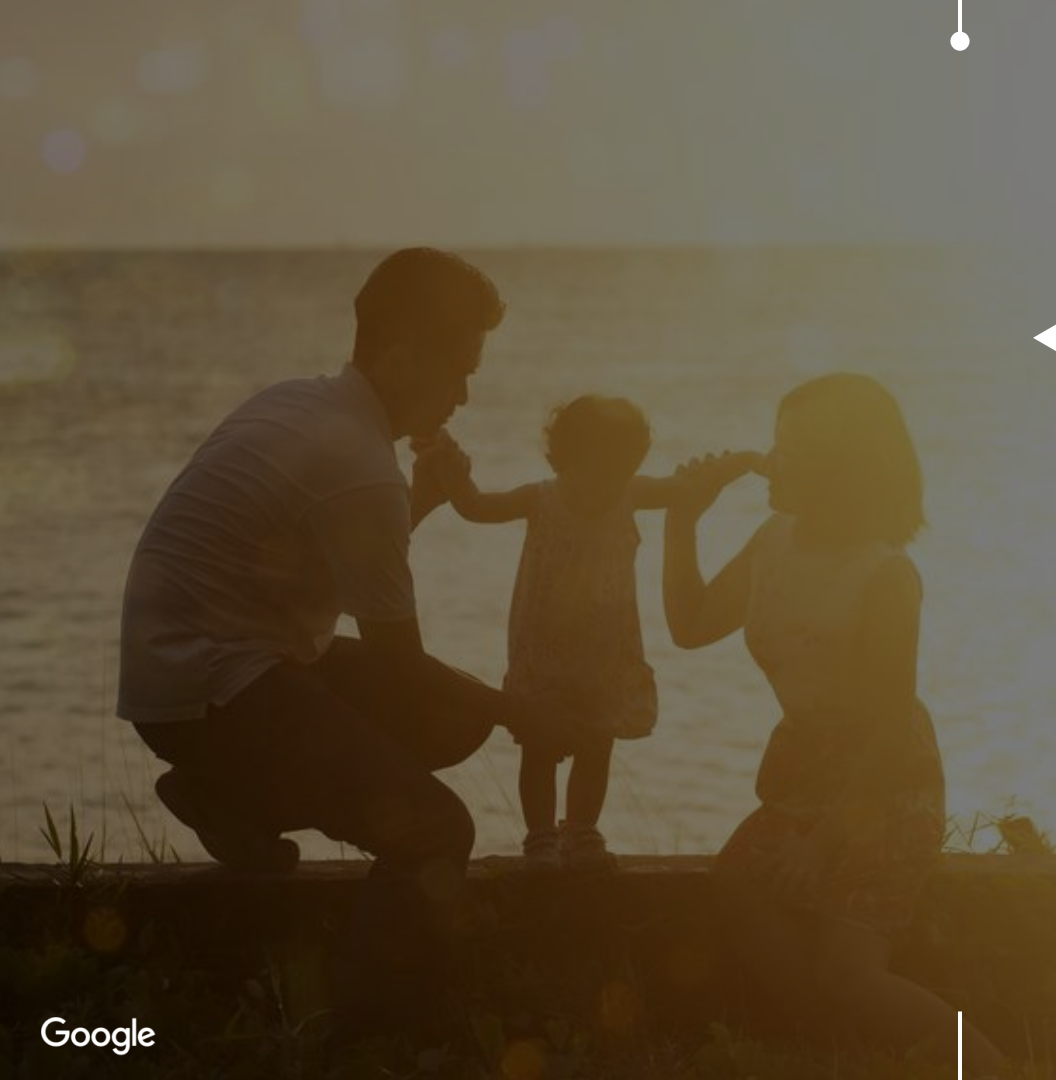


● **Shoppers are actively looking for information online** around your category and brand. 69% conduct pre-purchase research. 84% of them use online sources of information - mostly on smartphones (75%). Even while purchasing in-store, 67% continue to research online

● **Search plays a key role in the consumer's path to purchase:** 58% of online researchers use Search (#1). Search is also the most influential (88%) information source. Search continues to play an important role at POS with a quarter of shoppers searching in-store.

● **Search supports triggers action and supports brand awareness:** Search is the top online source of brand awareness. 63% searches lead to further online research, 36% lead to purchase





Putting human intent at
the center of your business

14

Countries in APAC

17

Industries

26_{k+}

Respondents

Path to Purchase Study

KANTAR TNS, Google

Baby Care Purchase Behavior



Baby care is a routine purchase

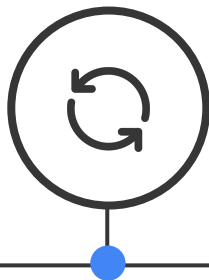
type of purchase

45%



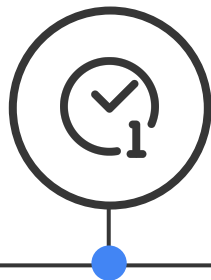
Routine

23%



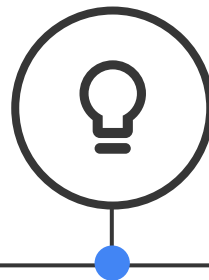
Replacement

14%



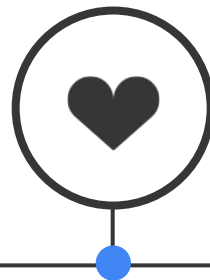
Planned First-Time

9%



Spontaneous First-Time

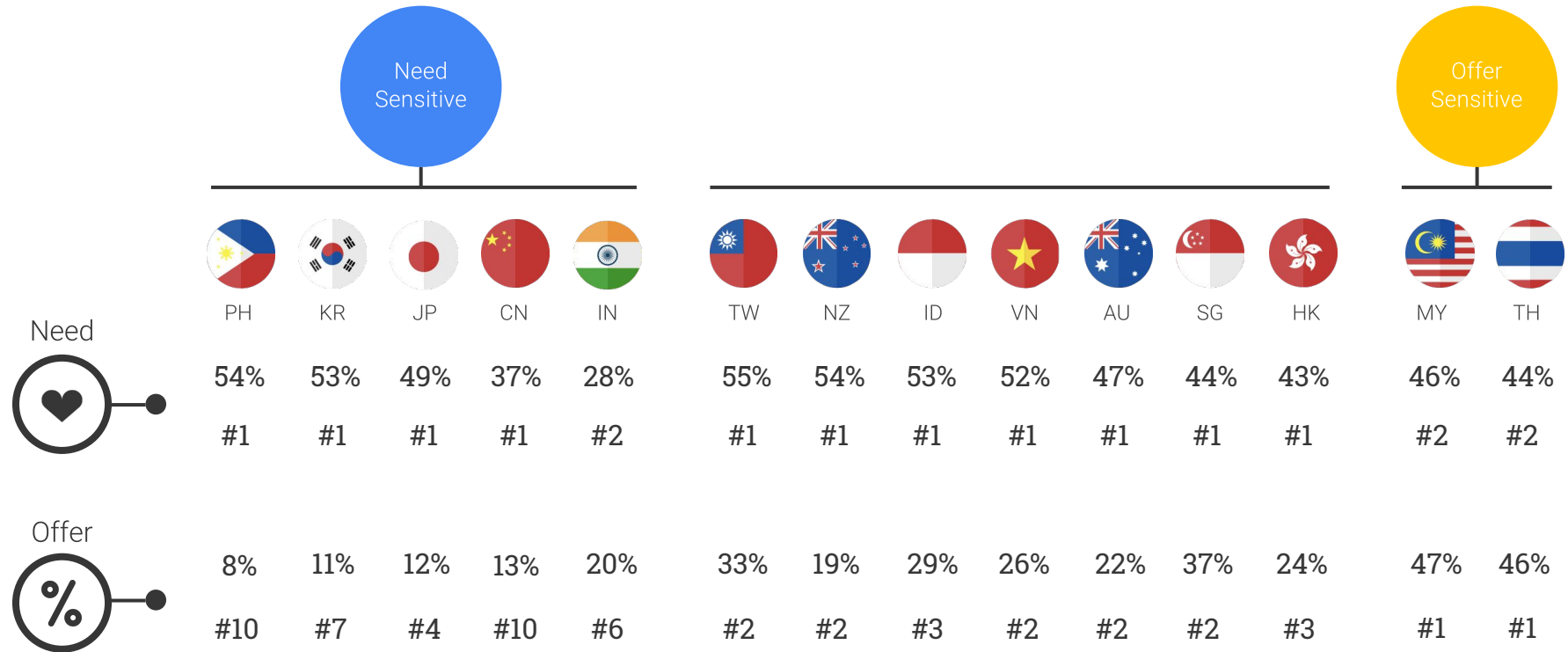
8%



Urgently Needed

2 - 3 weeks
purchase cycle frequency

Baby Care purchase is triggered by needs more than offers



The baby care consumer's mind is a competitive space



94%

Have **several brands in mind** when they first started thinking about buying a product



2.8

Average number of **brands considered**



30%

Open to new brands even though they have a preferred brand in mind



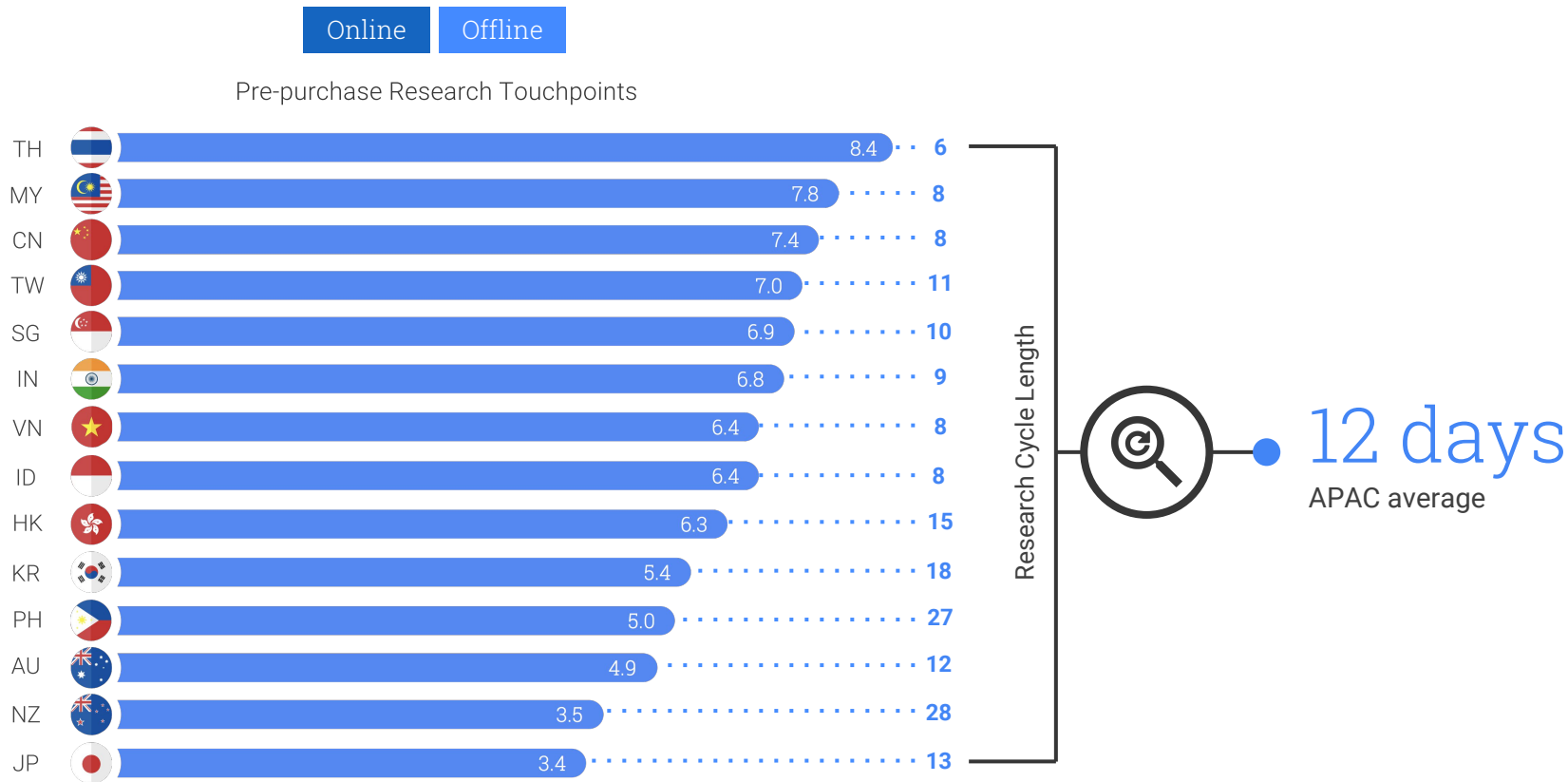
86%

Final brand choice is one of the brands from the **initial consideration set**

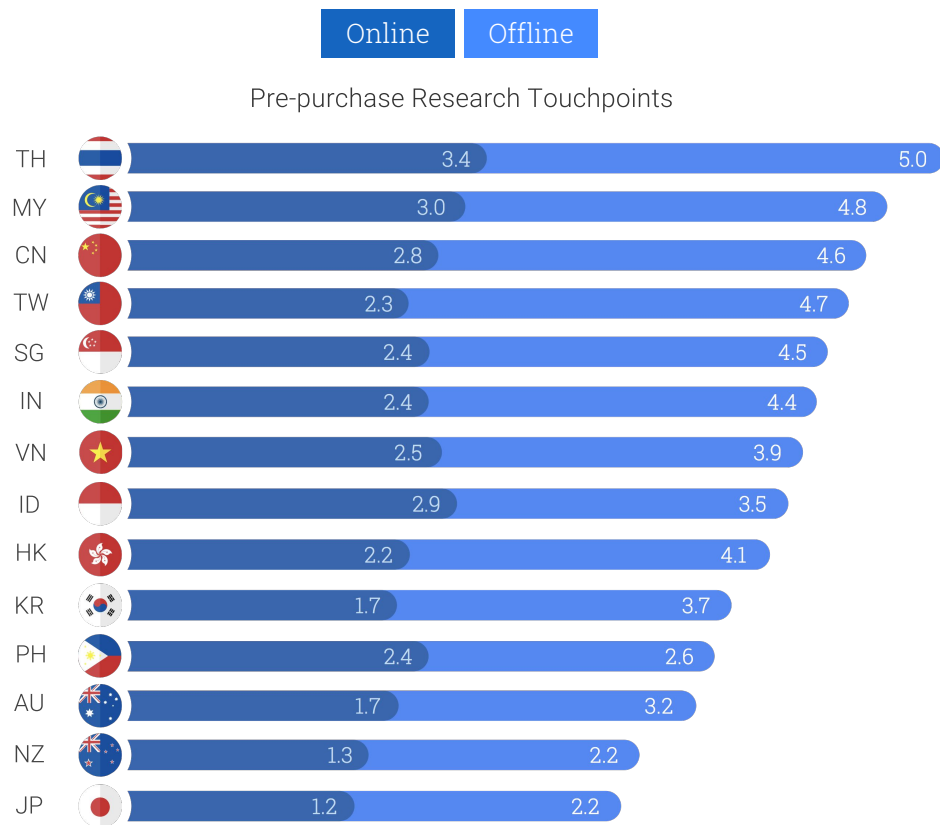
Baby care shoppers are constantly looking for information



Baby care research happens in intense, short bursts in emerging markets
and over extended periods in developed markets



While baby care shoppers still rely on offline sources of information, online outweighs offline during pre-purchase research



6.4

Average number of touchpoints



2.4

Average number of offline touchpoints



68%
In-Store



57%
Friend/
Family



49%
Direct
Mail

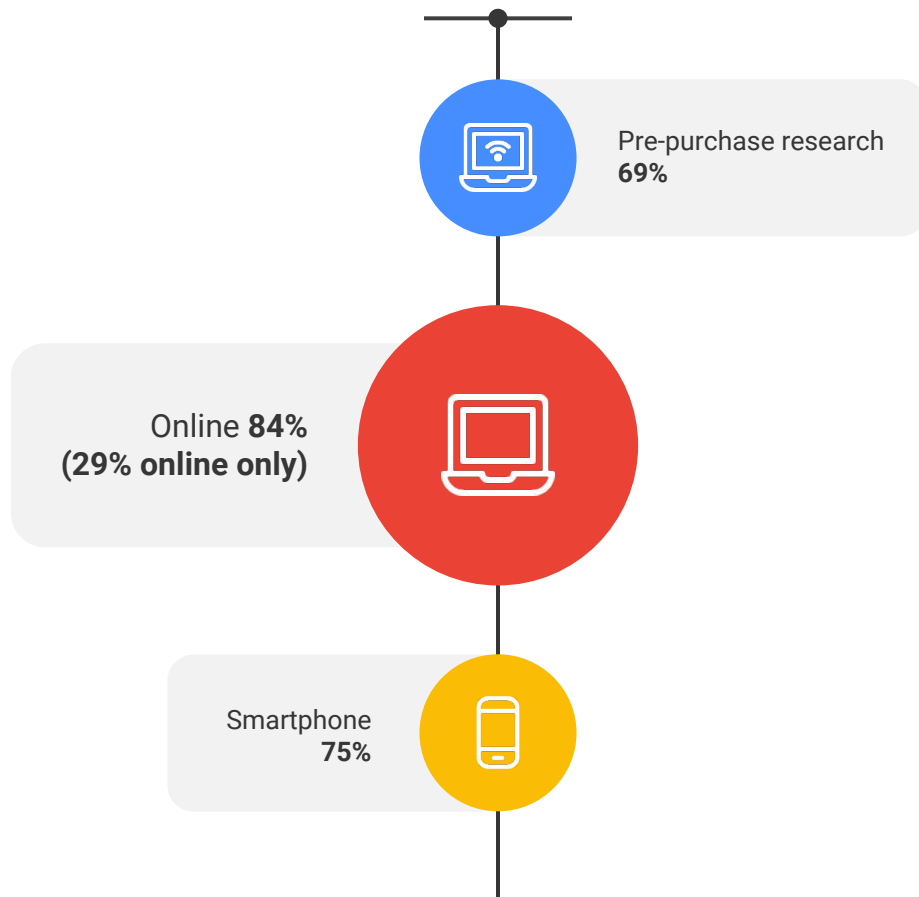


46%
TV/
Radio/Ad



42%
Doctor/
Pharmacist

Baby care shoppers turn to online to conduct research, specifically smartphones

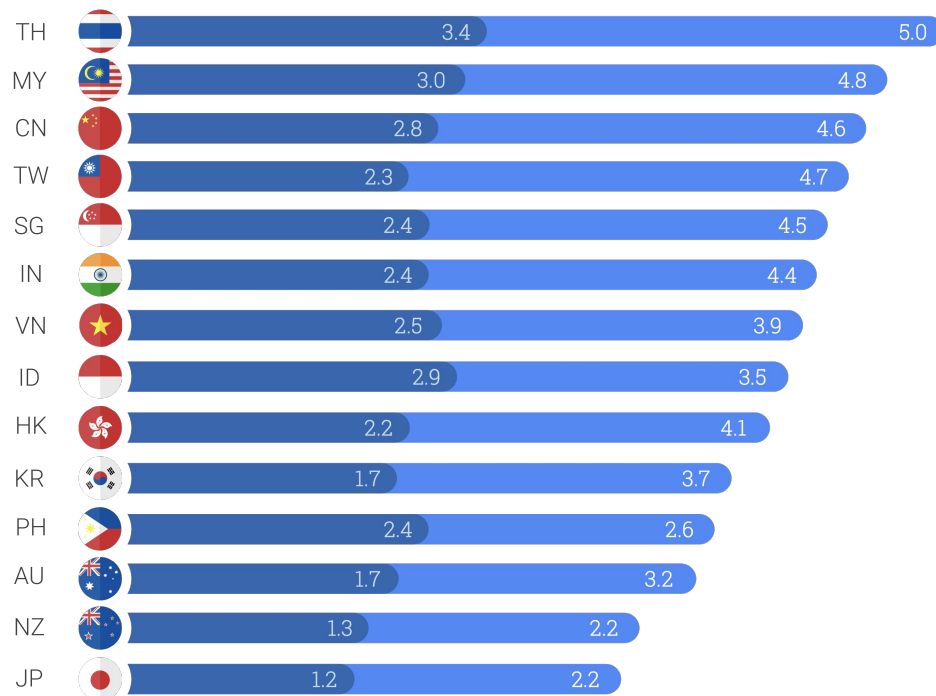


Baby care shoppers rely on search as a main source of information online

Online

Offline

Pre-purchase Research Touchpoints



6.4

Average number of touchpoints in the pre-purchase research stage



Average number of online touchpoints



58%

Search



48%

Brand Website



46%

Forum/ Blog



45%

Comparison website



44%

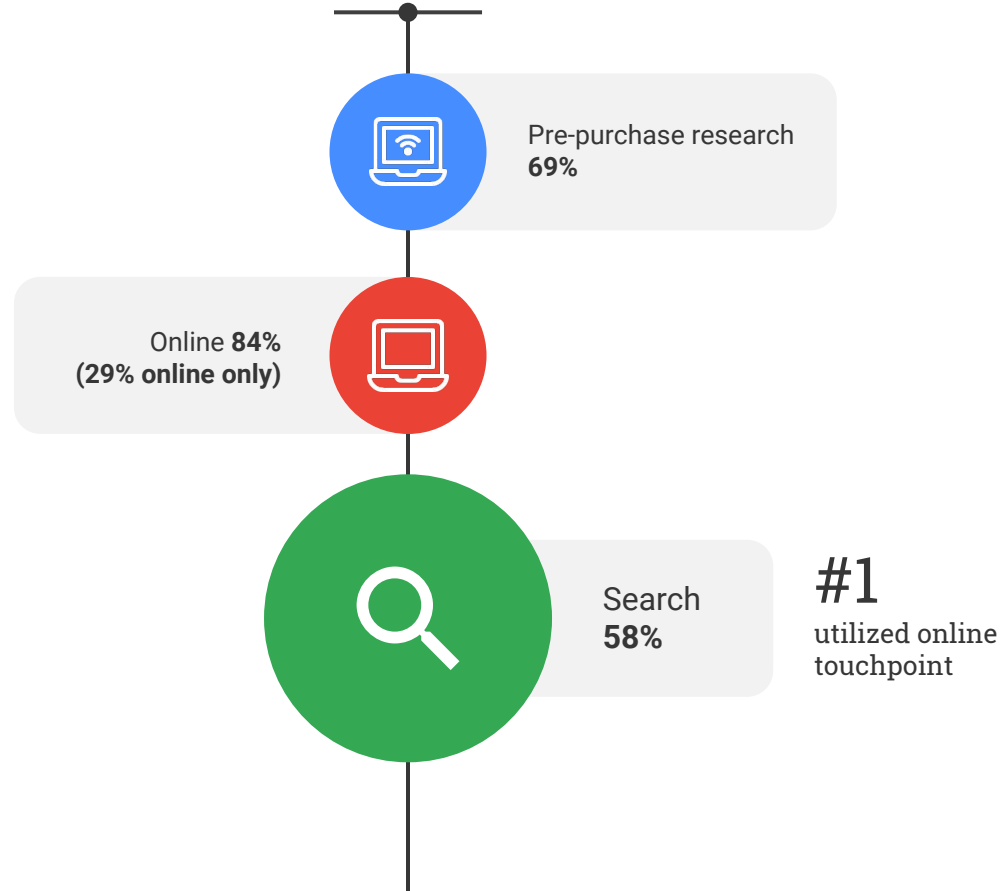
Retailer website

Rethink Context



62% of pre-purchase research on smartphones happens at home

Search is the most commonly used online touchpoint for baby care





88% Baby care shoppers find search an influential source of information



6 searches on average during their path to purchase

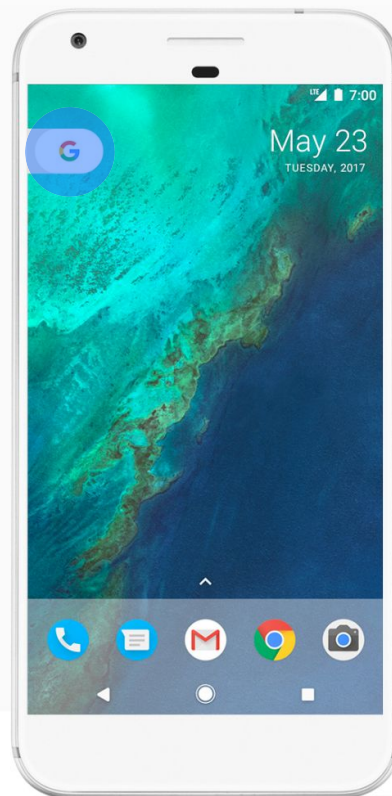
Mobile queries for baby care on Google Search are growing



+48% Growth in **mobile** baby care search queries on Google across APAC over the last 2 years*



67% Agree that having a **smartphone** has made them more likely to conduct pre-purchase research



Search enables baby care shoppers to find the information they need to make the right decision

top 5 things baby care shoppers search for

46%



User Reviews

44%



Best Prices

38%



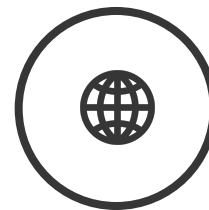
Features

35%



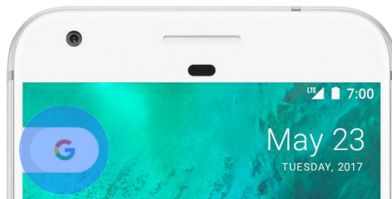
Professional Reviews

32%



Brand website

Search is used by baby care shoppers across moments of intent



63%



I-need-some-ideas moments

52%



Which-one's-best moments

45%



I-want-to-buy-it moments

Diaper Rash

People having a general awareness of the category they're interested in, such as baby care. They might have a problem or would like to see if there are better options, but they haven't narrowed down their choices to an exact product.

Diapers for sensitive skin

a.k.a . consideration moments - happen when people turn to their devices in short bursts of activity to compare prices, brands and specs.

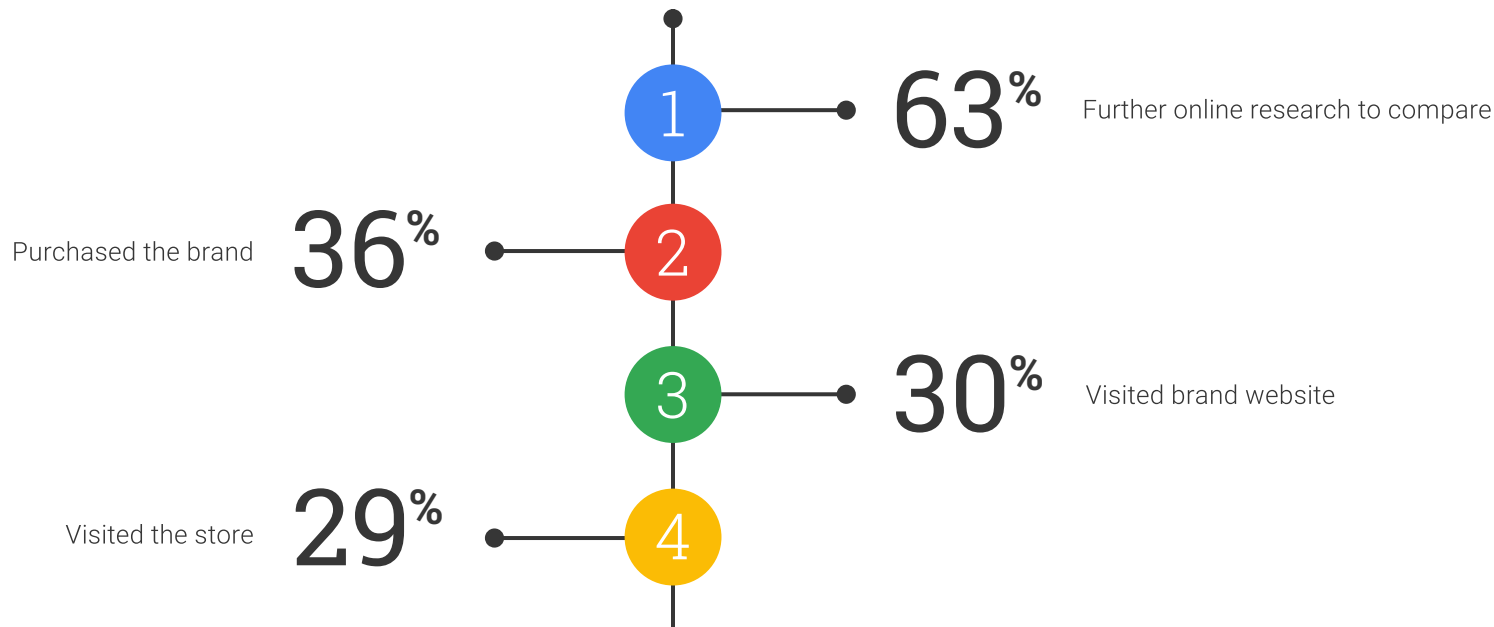
Pampers swaddlers

Happen when it's decision time. People make a choice about which brand to buy from, and where to buy.

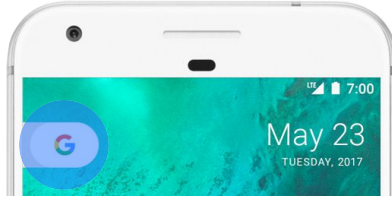
Search connects intent to action



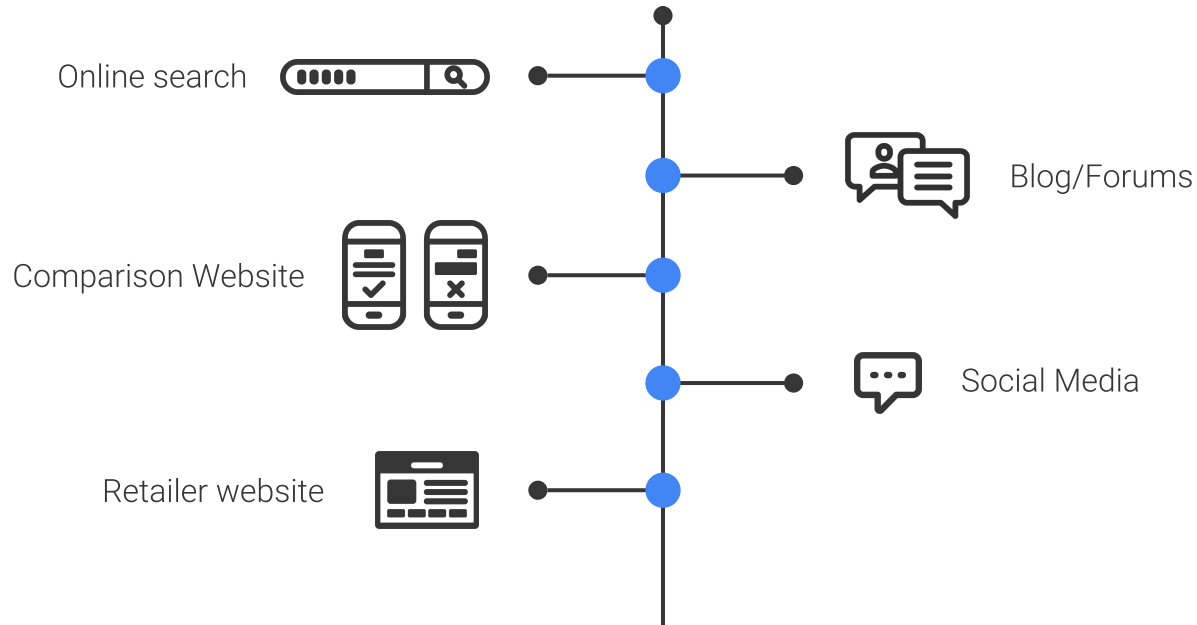
what baby care shoppers do immediately after searching for something online



Search drives brand awareness



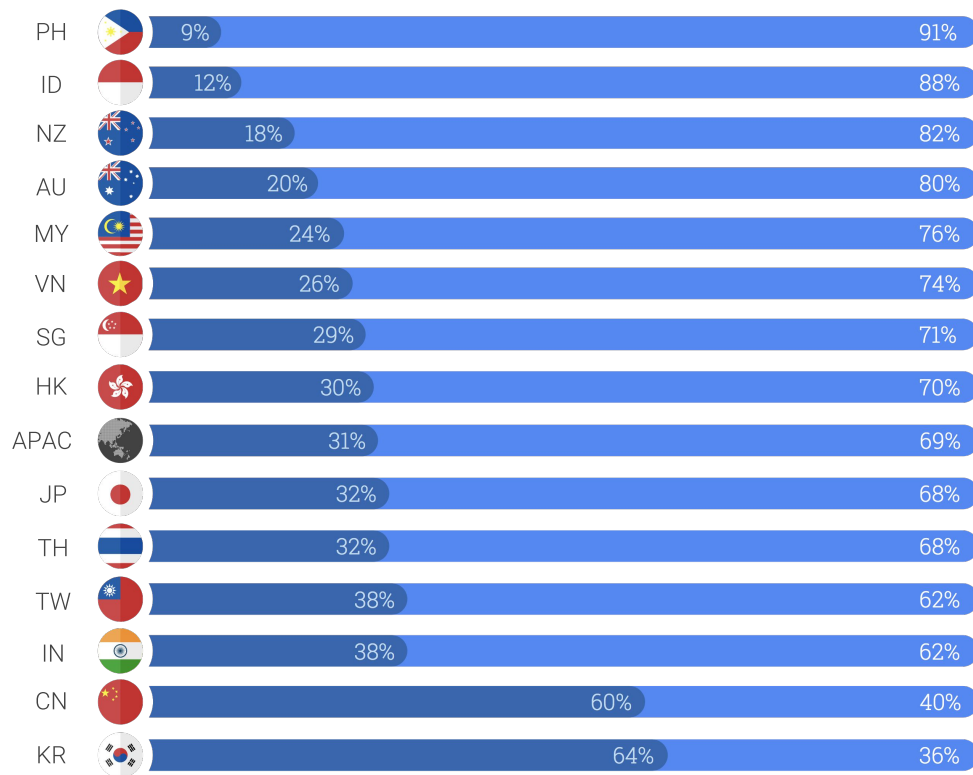
Top 5 sources of brand awareness for baby care shoppers



Point of Purchase



Most baby care shoppers still prefer buying offline



Online
Purchase

Offline
Purchase



51%

Of APAC Baby
Care shoppers
researched online
and purchased
offline

Smartphones are the new in-store research advisors



67%

Of APAC baby care
offline buyers research
online in-store



24%

Of APAC baby care
offline buyers use
online search in-store



18%

Of APAC baby care
offline buyers visit a
brand's website in-store

Baby care shoppers want seamless experiences when buying online



55% Of online purchases happened via smartphones



72% More likely to purchase from a brand whose mSite or App helps them find answers easily



70% More likely to purchase from a brand whose mSite or App helps them make purchases quickly

