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Passionate about Shopper Research

Call this Retail Therapy?!

**A Shopper Perspective Research Report
on Shopping with Mums of Young Kids**

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In this latest Shopper Perspective Report we look at the retail environment through the eyes of mums with young kids

Whole industries exist which focus on this target group, and vast sums are spent marketing to Mums of Young Kids

Yet our report demonstrates the need for the retail sector to provide a more tailored offer to Mums of Young Kids



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There is a lot of emotional baggage that comes with a mum with a young child, which retailers and manufacturers need to incorporate in their thinking when targeting this group

⊙ **The demise of the extended family**

- Women can no longer automatically rely on their mums handing down childcare 'rules'
- Women have to develop their own support networks
 - NCT / ante natal groups
 - Health visitor / health centre staff
 - Friends / siblings with children
 - Brands through positive experience

⊙ **Desire to do the right thing**

- Food and toys that are appropriate to that phase in development
- Food and toys that help with development, providing an appropriate challenge for the children
- Avoiding getting stuck in ruts

⊙ **Mums of young kids are by definition 'new mums'**

- Learning / re-learning what's expected of them; what's available; what works

⊙ **Pressure of coping with young children**

- At home
- In the retail environment



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badmothersclub.co.uk may try to make light of the shopping 'battlefield', but the underlying issues are real, as we have seen time and again in our own research.

Bad Mothers Club

In the aisle by the chill cabinets,
no-one can hear you scream.

Problem No. 2 Child has tantrum at supermarket

- Book:** Walk away from the child so they realise their attention-seeking is unproductive.
- Mother:** Tries to walk away but is intimidated by glares from childless shoppers buying estate bottled olive oil and wild rice.
- Grandma:** Wins over child with bribes of money and sweets.
- Father:** Looks at AutoTrader and pretends child belongs to someone else. Child screams place down.

"I was in Waitrose, for gods sake, and there I was swearing at an old lady because she tutted at my crying baby. Her reaction just soo made everything worse!"

' I find every trip a potential minefield.'

"It is almost impossible to do any kind of serious shopping with a two-year-old - they just want to grab things from the shelves or simply disappear out of sight!"

"You want to get out of the house. Then you get to the shops and want to go home!"



Mums want to feel that they and their children are welcome – which is measured by the facilities, services, and environment

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The retail environment

1. The basics:

Accessibility, facilities,
range, navigation

Good housekeeping

2. Guide & inspire:

Information, support,
service, interaction

Differentiating

1/2 mums with kids <2yrs want
information

1/2 want to interact with
products

3. Enthuse:

Ambience,
relaxation, enjoyment

Driving footfall

2/5 want kids made welcome

"The coffee shop in Books etc. was a great hit with local mums all sitting together drinking coffee and eating cake, relaxing whilst the toddlers were busy creating havoc in a special kids book/kids reading area where the kids (and parents if they so chose) could read the books and play - mums loved it!!! and bought more books!!!!"



The environment is certainly changing

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Retailers / Mall owners offering:

- Free nappies
- Free wipes
- Bottle warming machines / facilities
- Privacy rooms for breast feeding
- Family toilets that fit a pushchair



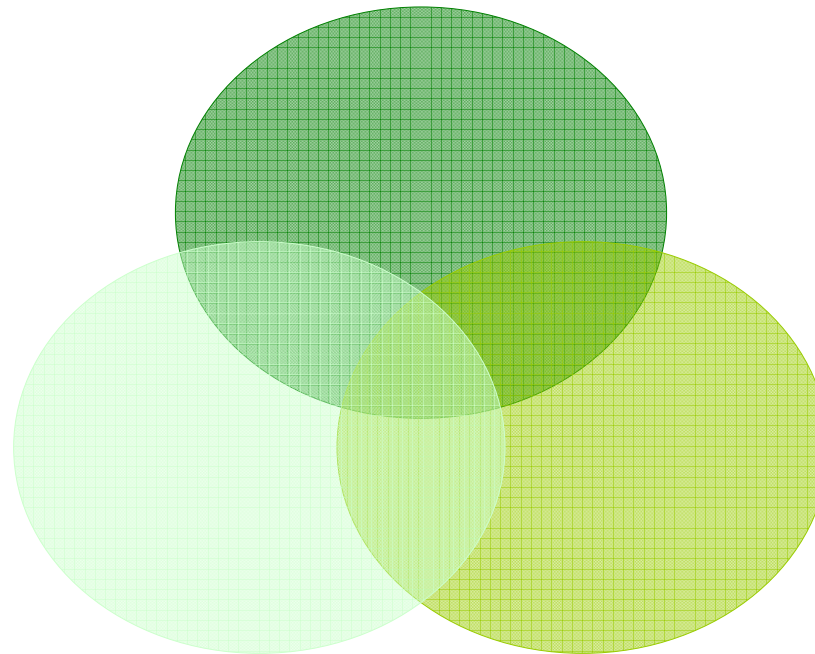
In-store cafes with child-friendly environments and menus



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But there is still much that could be done at a number of levels to help Mums of young kids. The remainder of this report considers the more detail issues facing businesses, and the opportunities that exist.

Retail Environment



Informed Choices

Solutions

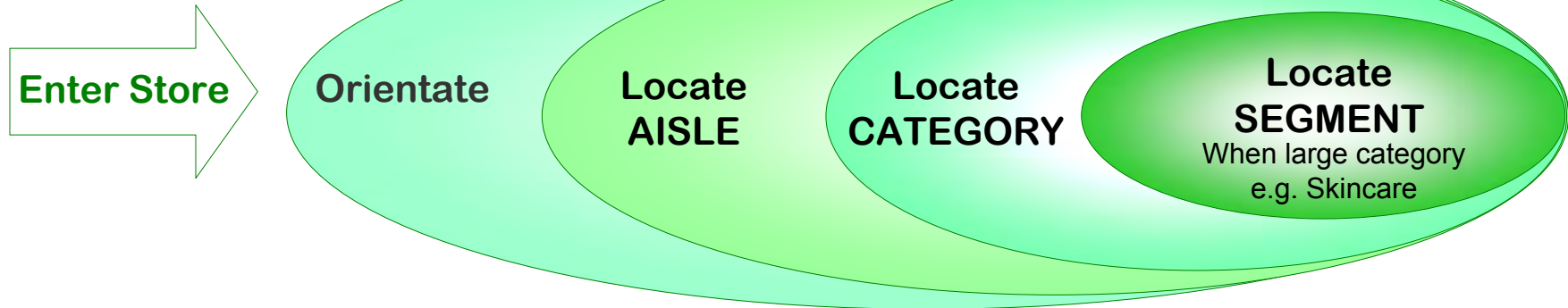
The three areas are closely linked, and can each play a role to the benefit of Mums of young kids



As a whole, early years categories lack in-store navigation cues at all levels of the shopper journey

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Shopper Journey



Ideally the store should provide the navigation, but in this instance shoppers develop their own navigation cues

Shopper Navigation

LOCATE AISLE	LOCATE CATEGORY	LOCATE SEGMENT
<ul style="list-style-type: none"> Locate logical aisle adjacencies e.g. Health & Beauty / Baby Clothing Check gondola ends 	<ul style="list-style-type: none"> Find brands representing category Johnsons = skincare Sudacreme/Calpol = medicinal Look for pack cues Large packs = nappies Tins = milk Small jars = baby food 	<ul style="list-style-type: none"> Look for key brands Representing price / format etc



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A lack of POS at the fixture can mean the range lacks clarity and is therefore difficult to shop

- ⊙ **If the category structure is brand-led it drives superficial brand loyalty**
 - Shoppers keep to the same brands because its easier to shop that way
 - Shoppers are given no incentive to actively consider or shop the alternatives

- ⊙ **Packaging is left to speak for itself**
 - Difficult when the packs are as small as baby food jars

- ⊙ **Fundamental shopper needs are not met**
 - Identifying the products which are suitable to the age of the baby is one the key steps in the purchase process

- ⊙ **Without supporting POS the shopper is left to work out the options for themselves**
 - A time consuming and frustrating process
 - Suggests to shoppers a lack of interest on the part of the retailer



Tesco Extra, Watford

"My wife's written down exactly what she wants - says the baby won't eat anything else, and it's the most popular flavour so I won't have any problems finding it. But can I see it here?!"



Bus-stops / wobblers break up the range into manageable segments, aiding navigation

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The introduction of simple POS breaks up the choice, allows mum to get to the area of the fixture she needs quickly, so the time saved can be spent considering the options more carefully

Asda, Milton Keynes



Alternatively, shelf ready packaging can be utilised by the manufacturers to better display information that is key to the purchase process





Information at the fixture can be powerfully and empathetically executed

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The tone of signage can engage shoppers, whilst basic information can clarify the options available and help the purchase decision

Again these factors make mums of young kids feel welcome and understood



Boots, Oxford St



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In grocery stores shoppers are *forced* to slow down at the early years fixtures, rather than being proactively engaged by the categories

- ⦿ **Many retail environments which give significant space to baby products fail to engage the shopper**
- ⦿ **Even categories with large packaging, which are shopped regularly can be difficult to shop**
 - Shoppers of nappies have to check they are buying the right size
 - When the baby moves into the next size, the visual cues have to be re-learnt to avoid mis-purchases
- ⦿ **The shopper is 'forced' to slow down the trolley, rather than being positively encouraged to slow down**
 - The shopping process is still purposive, rather than browsing
 - Time is spent checking the right choice is being made, rather than considering the alternatives



Tesco Extra, Watford

"It's not fun shopping! It's not as if you enjoy spending an age at the shelf trying to find what you are after. But you feel you should make sure you're getting the right thing."



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Visual merchandising can stop mums in their tracks in a positive way, and drive impulse consideration

- ⦿ POS which reminds mums of the fun side of children will stand out in retail environments shopped more typically for everyday household items
- ⦿ This example works on a number of levels:
 - Both mums and children become engaged in the purchase decision
 - The purchase is a joint effort
 - Both have fun in making the purchase
 - The children are distracted from the boredom of shopping
 - Mum can reward the child for good behaviour using a creative category rather than resorting to sweets or snacks



“Certainly grabs your attention, doesn't it, better than just looking at a row of packs. And as it's raining today, it's perfect timing too!”



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The packaging is often the only information on which to base the purchase decision, and the on-pack communication should reflect this

- ⦿ Pack designs should reflect the shopper needs as well as consumer needs
- ⦿ The emotive on-pack language used in some baby care categories is difficult to shop
 - Shoppers have to make a decision based on what they can see in-store
 - If the in-store information is unclear, the purchase decision becomes more difficult
 - The stacking of packs on-shelf can add to the problem by hiding the key information
- ⦿ Again, time is added to the purchase process, yet it is not time usefully spent



Tesco Extra, Watford

"So, what IS the difference between 'skincare' and 'extra care'?! Surely ALL Johnsons products protect and are soft?!"



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Pack design should reflect the speed with which Mums of Young Kids are shopping in the grocery sector in particular. Of all shoppers they are most likely to want to get in and get out as quickly as possible.

⊙ In this example, the 'one full portion' message is on the side of pack

⊙ Yet this is likely to have the biggest impact in-store

- A clear, concise and positive message
- Easier to see and take in than a series of ticks
- A message easily absorbed very quickly in-store





Even in retail environments developed for Mums of Young Kids basic barriers continue to exist

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- ⦿ **Products piled on the floors can create obstacles for mums with buggies**
- ⦿ **Shoppers like to interact with the toys they are considering buying**
 - If not out on display, shoppers will open the boxes to touch and feel the product



Mothercare



The desire for interaction with toys can be used to the advantage of the store, or the product

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◎ Some stores are actively encouraging interaction

- Early Learning Centre
 - Tuesday morning = playtime in-store
- Hamleys
 - Soft toy area
 - Numerous POS allowing toys to be tested



◎ Such initiatives give a reason to visit the stores

- Differentiating from the competition
- Making mums feel welcome
- Encouraging engagement which is more likely to lead to a purchase

"in Hamleys everything is brought to life - you can touch everything"





New media can show case large or more complex products

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- ⦿ **Some toys or products are too big or too complex to have available to interact with on the shop floor**
- ⦿ **New media can remove this barrier**
 - Showcasing the products
 - Engaging the shopper in the product, and the in-store environment
 - Creating interest in-store for children as well



ToysRUs



The trend for buying developmental toys needs to be reflected in the in-store environment as well

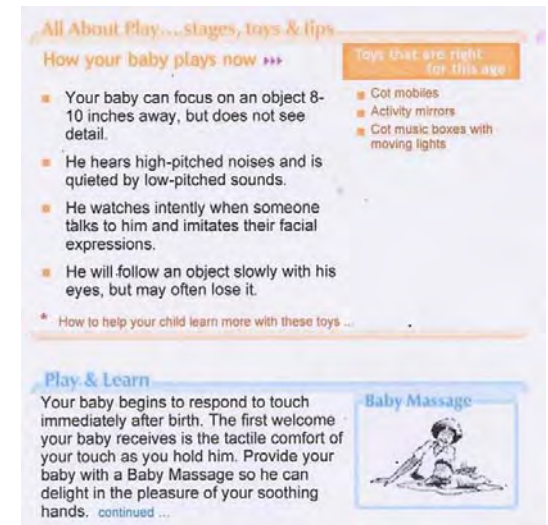
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- ⦿ **Packaging for developmental toys should highlight how the toy can ‘grow’ with the child**



- ⦿ **The advice and tips regularly used on websites could be adapted for the in-store environment**

- Encouraging the shopper to think differently about toy purchasing
- Highlighting the developmental needs of the child, and so helping define which toys are appropriate to each stage
- Engaging the shopper so that they actively consider the options and base the decision on the functional elements of toys rather than aesthetic factors



FisherPrice Website



Ultimately, what shoppers really want is the in-store solution to their needs.

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◎ **Solutions can be narrowed down to two approaches in-store:**

1. Needs or occasion based solutions

- This involves micro level shopper marketing
 - Identifying the specific needs and occasions which can link categories, and creating appropriate fixtures to meet those needs
- Such solutions are category specific
 - Aiming to inspire shoppers or provide them with new options that empower their decisions
- Such solutions aim to change the purchase process and drive sales

2. Baby zone

- This approach is all about macro level shopper marketing
 - Pulling together all categories that could relate to the end consumer
- Such solutions are about store layout
 - Looking to ease the shopping process, and build store loyalty as a result
- These solutions aim to change the store choice decision and drive footfall to store



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Needs / occasion based solutions are about adjacencies that flow, and thoughtful placement of alternative categories

1. If a new range of chilled products is launched for babies, then that should be placed at the end of the baby food aisle, not in the chiller section of the store



2. Babies starting to eat jar foods are likely to also be teething

- Bringing Calpol and Bonjela into the baby food aisle provides a solution in terms of the particular stage of development





Dual siting of products could be developed to provide a complete solution to specific needs, again highlighting that the retailer understands shoppers needs, and is willing to reflect these in the in-store environment

The Challenge

Eczema is one of the most common childhood complaints - 1 in 3 children below the age of 3 suffer from the condition. (Womans Hour, Radio 4)

The Current 'Solution'



The real solution

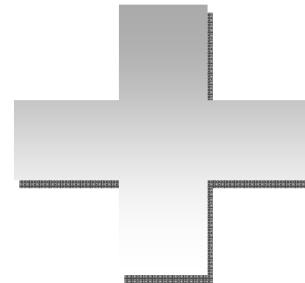




A relatively bland fixture could be pushed further by bringing website initiatives into store to inspire the shopper and drive a change in behaviour

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Adapting website information to create take home recipe leaflets inspires the shopper, and empowers them to change their usage habits and make new purchase choices



The ideal, however, for mums is the baby zone, where everything relating to baby is in one place in-store, allowing mum to focus entirely on her baby needs at a single point in the shopping journey

"What you really want is everything in one place"



Carrefour



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Such approaches are starting to emerge in the UK, with Boots leading the way. However the Grocery channel arguably offers the greatest opportunity, but also the greatest challenge.





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Focus on helping mums to shop

- ⦿ **Use beacon brands to aid navigation**
- ⦿ **Segment categories to help shoppers navigate**
- ⦿ **Use visual merchandising to break mums out of blinkered mode**
- ⦿ **Highlight choices through informative POS**
- ⦿ **Provide take home information for complex categories**
- ⦿ **Develop a baby zone with all relevant products**
- ⦿ **Introduce stimulus for children to allow mums to relax and spend time**

Delight mums and you'll be the talk of the toddler group!