Methodology Overview

- In February 2013, Arbitron and Edison Research conducted a national telephone survey (landline and cell phone) of 2,021 people aged 12 and older
- The sample yielded 319 Moms
- “Mom” is defined as a woman having a child under 18 living in her household
- This study is from the Infinite Dial series which dates back to 1998
Mom in 2013 is connected, mobile and of course a multi-tasker

Moms are a highly sought after demographic group in advertising and marketing

She is a decision maker; always planning what’s next on her agenda
Today’s Mom understands the importance and benefits of technology. In fact, she embraces it.

Mom looks to technology to help her navigate her busy day.
Moms are social savvy

They like, they follow and they respond to brands and retailers who are authentic

Advertisers and marketers want to be ‘liked’ by Mom
Themes that emerged from Moms and Media this year:

- Moms continue to take their Internet on the go
- Social networking remains solid and access via cell is rising
- Tablets are gaining traction
- Smartphones are taking on new responsibilities
- Moms still consume traditional media, but blend it with modern technology
The majority of Moms are over age 35

Age:
- 18-24: 15%
- 25-34: 28%
- 35-44: 33%
- 45+: 24%
More than half of Moms are employed

Employment status:
- Full-time 40%
- Part-time 16%
- Temporarily unemployed 6%
- Homemaker 24%
- Retired 5%
- Student 9%
Almost all Moms are online

90% Moms with Internet access from any location
Mom gives Internet even more of her precious time

Self-reported hours spent with Internet in the last 24 hours (HH:MM)

- 2013: 2:53
- 2012: 2:43
- 2011: 2:36
- 2010: 2:04
- 2009: 1:47
- 2008: 1:34
Moms maintain lead over others with time spent online

Hours spent online in the past 24 hours (HH:MM)

- 2013: Moms 2:53, Total Respondents 2:38
- 2012: Moms 2:38, Total Respondents 2:43
- 2011: Moms 2:25, Total Respondents 2:22
- 2010: Moms 2:04, Total Respondents 1:56
- 2009: Moms 1:47, Total Respondents 1:46
- 2008: Moms 1:34, Total Respondents 1:32

Total Respondents
Mom gives more than one third of her day to media

Self-reported time spent with Internet, television, radio and newspapers in the last 24 hours

2003
7 hours 3 minutes

2013
8 hours 37 minutes
Wi-Fi is a necessity for Mom

% of Moms With Wi-Fi Network in Household

- 2011: 60%
- 2012: 74%
- 2013: 75%
Mom uses Wi-Fi to the fullest

“How many total devices are connected to the Internet in your home?”

- One or Two: 35%
- Three or Four: 25%
- Five or more: 41%

On average, Moms have about five devices connected.

Base: Moms with Wi-Fi at home
Mom shops online, but not as much as Dad does

% saying they shop online at least sometimes...

- **At home:**
  - Moms: 50
  - Dads: 59

- **While at work:**
  - Moms: 12
  - Dads: 23

- **When not at home or work:**
  - Moms: 12
  - Dads: 14

Dads are much more likely to shop online while at work

*Base: Those who currently access Internet*
Being Social in the Motherhood
Facebook familiarity holding steady with Moms

93% of Moms have heard of Facebook
More than 7 in 10 Moms have a profile on Facebook

% of Moms who have a profile page on Facebook

Growth has leveled off in the last year

- 2008: 9%
- 2009: 21%
- 2010: 50%
- 2011: 62%
- 2012: 72%
- 2013: 72%
Mom is becoming a Facebook veteran

“How long have you been a Facebook user?”

Almost a quarter of Facebook Moms have now been on the site for at least five years.

Base: Moms with a profile page on Facebook
New social media are on Mom’s radar

% of Moms familiar with each

- Instagram: 70%
- Pinterest: 50%
- Tumblr: 32%

Awareness is high for new social media sites.
Pinterest is out ahead faster with Moms

% of Moms who have...

An account with Instagram
17%

A board on Pinterest
22%

An account with Tumblr
3%
Almost half of social media Moms check in multiple times on a daily basis.

% of Moms using social networking Web sites *several times* per day

- 2013: 47%
- 2012: 46%
- 2011: 37%
- 2010: 32%
- 2009: 18%
- 2008: 11%

*Base: Moms with a profile page on a social networking site*
Mom checks Facebook constantly

Average number of times checking Facebook in 24 hours

- Moms: 5.1
- Dads: 3.5
- All Facebook Users: 4.9

Base: Those with a profile page on Facebook
Cell phones continue gaining traction for Facebook access

“Which of the following ways do you ever access Facebook?”

<table>
<thead>
<tr>
<th>Device</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop or laptop computer</td>
<td>93</td>
<td>86</td>
</tr>
<tr>
<td>Cell phone</td>
<td>65</td>
<td>72</td>
</tr>
<tr>
<td>Tablet</td>
<td>22</td>
<td>37</td>
</tr>
</tbody>
</table>

Nearly three-quarters now use cell phone to access Facebook

Base: Moms with a profile page on Facebook
For Mom, cell phone is equal to computer for accessing Facebook most

“What one way do you access Facebook most?”

- Desktop or laptop computer: 46%
- Cell phone: 45%
- Tablet: 7%

Smartphones are driving mobile Facebook access

Base: Moms with a profile page on Facebook
Mom’s Facebook access is not the same as others

“Which one way do you access Facebook most?”

Base: Those with a profile page on Facebook

<table>
<thead>
<tr>
<th>Device Type</th>
<th>Moms</th>
<th>All Facebook Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop or laptop computer</td>
<td>46</td>
<td>51</td>
</tr>
<tr>
<td>Cell phone</td>
<td>45</td>
<td>39</td>
</tr>
<tr>
<td>Tablet</td>
<td>7</td>
<td>6</td>
</tr>
</tbody>
</table>

Moms are more likely to access Facebook through cell phone
Half of Facebook Moms have more than two hundred friends

“Approximately how many Facebook friends do you have?”

- Fewer than 100 friends: 34%
- 100-199 friends: 17%
- 200-299 friends: 18%
- 300-499 friends: 16%
- 500 or more friends: 15%

Base: Moms with a profile page on Facebook
Mom has more friends this year on Facebook

Average number of Facebook friends for Moms

2012
255 friends

2013
303 friends

Base: Moms with a profile page on Facebook
Moms have more Facebook friends than Dads

303
Average number of Facebook friends for Moms

291
Average number of Facebook friends for Dads

Base: Those with a profile page on Facebook
Moms are slightly more likely to follow brands on social networking sites

"Do you follow any companies or brands on any social networking sites such as Facebook or Twitter?"

Base: Those who use social networking web sites or services
Mom chooses Facebook most to connect with brands

"Which ONE social networking site or service do you use most to connect with brands or products?"

Facebook is the champion for connecting to brands and companies

Facebook: 83 percent
All Other Social Media Sites: 11 percent

Base: Moms who follow brands on social networking web sites or services
Mom is very aware of Twitter…

% of Moms who have heard of Twitter

Yes 94%

No 6%
…But tweeting is still slow to catch on

The percentage of Moms who ever use Twitter

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>9%</td>
</tr>
<tr>
<td>2012</td>
<td>10%</td>
</tr>
<tr>
<td>2013</td>
<td>13%</td>
</tr>
</tbody>
</table>
Let’s Make A Deal
About one quarter of Moms use ‘Daily Deals’

% of registered ‘Daily Deals’ users

Registered 'Daily Deals' users 25%

Non-users 75%
Mom is more likely to be a ‘Daily Deals’ user

% of registered ‘Daily Deals’ users

- Moms: 25%
- Dads: 16%
- Total Respondents: 14%

percent
‘Invitation-Only’ sales sites are a new option for Mom

% of ‘Invitation-Only’ registered members
(Fab, Touch of Modern, Gilt Groupe and The Foundary)

- Non-members: 94%
- ‘Invitation-Only’ members: 6%
Busy Moms are Mobile
Reach Mom on her cell phone

95% of Moms own a cell phone
Moms continue to lead smartphone ownership

% who own a smartphone

<table>
<thead>
<tr>
<th>Year</th>
<th>Moms</th>
<th>Total Respondents</th>
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</thead>
<tbody>
<tr>
<td>2013</td>
<td>64</td>
<td>53</td>
</tr>
<tr>
<td>2012</td>
<td>61</td>
<td>44</td>
</tr>
<tr>
<td>2011</td>
<td>36</td>
<td>31</td>
</tr>
<tr>
<td>2010</td>
<td>15</td>
<td>14</td>
</tr>
<tr>
<td>2009</td>
<td>8</td>
<td>10</td>
</tr>
</tbody>
</table>
Cell phone is usually close by Mom

“How often is your cell phone with you or nearby, when it is within arm’s length?”

Percent saying “Always” or “Most of the time”

- Cell phone Moms: 74%
- Smartphone Moms: 89%
Smartphones are not just for calling

<table>
<thead>
<tr>
<th>Activity</th>
<th>% Who Use Their Smartphone at Least Once Per Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make or receive calls</td>
<td>95</td>
</tr>
<tr>
<td>Send or receive texts</td>
<td>89</td>
</tr>
<tr>
<td>Browse the Internet</td>
<td>67</td>
</tr>
<tr>
<td>Social networking</td>
<td>56</td>
</tr>
<tr>
<td>Take pictures</td>
<td>54</td>
</tr>
<tr>
<td>Play games</td>
<td>37</td>
</tr>
</tbody>
</table>

Base: Moms who own a smartphone
Smartphones are not just for calling

% who use their smartphone at least once per day for each item

- Listen to downloaded music: 30%
- Add photos to social networking sites: 18%
- Listen to online radio: 17%
- Watch video: 11%
- Access coupons or special offers: 8%
- Scan a QR code: 3%

Base: Moms who own a smartphone
Mom is more of a smartphone photographer

% saying they use their smartphone at least once per day to take pictures

54%
Smartphone Moms

39%
Smartphone Total
Tablet ownership jumps with Mom in just one year

Base: Moms owning any type of tablet
Moms blend traditional and modern media habits
The cell phone is the wake up call for Mom

“Which ONE of the following do you use most often to wake up in the morning?”

- Cell phone: 42%
- Clock radio: 14%
- Alarm clock: 21%
- Wake up some other way: 23%
43% of working Moms listen to the radio while at work.
Smartphones have settled in for at-work listening

Among Moms who listen to the radio at work, the % who listen on...

- **a regular radio**: 56%
- **a computer over the Internet**: 19%
- **a mobile device such as a smartphone**: 24%

In 2013, mobile devices are now preferred over computer streaming.
Two-thirds of Moms share some part of their television viewing time with Internet usage.

- **Use Internet while watching TV**: 66%
- **Do not use Internet while watching TV**: 34%

*Base: Moms with Internet access*
Mom is watching Internet video but Dad is watching more

“Have you viewed video over the Internet…”

<table>
<thead>
<tr>
<th></th>
<th>Moms</th>
<th>Dads</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ever</td>
<td>67</td>
<td>77</td>
</tr>
<tr>
<td>In The Last Month</td>
<td>57</td>
<td>68</td>
</tr>
<tr>
<td>In The Last Week</td>
<td>47</td>
<td>57</td>
</tr>
</tbody>
</table>

Base: Those with Internet access
Conclusions
What Moms told us in 2013

- Internet is a daily staple for Moms; they remain well connected with devices both at home and on the go
- Most Moms use the Internet while watching TV
- Moms continue to heavily use their smartphones for social networking and Internet access
- More than other demographic groups, Moms also utilize smartphones for everyday tasks like waking up, at work listening and taking pictures
What Moms told us in 2013

• Facebook remains the social media site for Moms to engage
• Although Facebook profile growth is flat, Moms are adding more ‘friends’
• Moms are curious about new, up-and-coming social media sites like Pinterest, Instagram and Tumblr
• Tablets are a growing trend for Moms; blending in to her mobile and busy lifestyle
Moms and Media 2013

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