Mom in 2014 is connected and mobile

With her purchasing power, Mom is a force in advertising and marketing

She is mobile, and keeps close to her smartphone
Why it matters that Mom is mobile

Mobile devices allow Mom to:

- Be online everywhere
- Regularly interact with brands and retailers
- Engage with other consumers
- Leverage social media passion and usage
- Be constantly accessible
Methodology Overview

- In January 2014, Edison Research conducted a national telephone survey (landline and cell phone) of 2,023 people aged 12 and older
- The sample yielded 362 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
- Research was sponsored by Triton Digital
The majority of Moms are over age 35

Age:
- 18-24: 14%
- 25-34: 27%
- 35-44: 29%
- 45+: 30%
More than half of Moms are employed

Employment status:

- Full time: 45%
- Part time: 15%
- Homemaker: 19%
Mobile is a must for Mom
Nearly all Moms have a cell phone

92% of Moms own a cell phone
Mom remains ahead with smartphone ownership

% who own a smartphone

- Moms
- Total Respondents

Year
- 2009
- 2010
- 2011
- 2012
- 2013
- 2014

Values
- 2009: 8, 10
- 2010: 15, 14
- 2011: 36, 31
- 2012: 61, 44
- 2013: 64, 53
- 2014: 69, 61
Mom keeps her phone close

“How often is your cell phone within arm’s length?”

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

- Cell phone Moms: 70%
- Smartphone Moms: 83%
Mom is texting multiple times a day

“How often do you send or receive text messages on your cell phone?”

Percent saying at least “Several times per day”

- Moms: 71
- Total Respondents: 59

Base: Those who own a cell phone
Tablet ownership continues to soar with Mom

Moms owning any type of tablet

- 2012: 22%
- 2013: 31%
- 2014: 47%
Smartphone Moms make their music mobile too

% of Smartphone Moms who have downloaded each app

- **Pandora**: 51
- **iHeart Radio**: 19
- **Any AM/FM station app**: 13
- **Spotify**: 8
- **Google Play All Access**: 5
- **Slacker**: 4
- **Rhapsody**: 4
- **SiriusXM app**: 3
- **TuneIn**: 3
- **Radio.com**: 3

Smartphone Moms favor Pandora, but show diversity with audio apps.
Three in ten Moms turn to mobile while in car to hear online radio

% of Cell Phone Moms who have *EVER* listened to online radio through the stream from a cell phone connected to the car audio system.
Online radio finds a place with Mom

% who have listened to online radio:

<table>
<thead>
<tr>
<th></th>
<th>Moms</th>
<th>Total Respondents</th>
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<tbody>
<tr>
<td>Ever</td>
<td>73</td>
<td>63</td>
</tr>
<tr>
<td>In The Last Month</td>
<td>56</td>
<td>47</td>
</tr>
<tr>
<td>In The Last Week</td>
<td>38</td>
<td>36</td>
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</table>
Average time spent weekly with online radio

Self-reported hours spent with all sources of online radio in the last week

12 hours 4 minutes

Includes AM or FM radio stations on the Internet and Internet-only audio sources

Base: Moms who have listened to Internet radio in the last week
For Mom’s online radio, it’s a close race for computers and smartphones

% of Moms who have listened to online radio in the last week and ever listen via…

<table>
<thead>
<tr>
<th>Device</th>
<th>Percent</th>
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</thead>
<tbody>
<tr>
<td>Desktop/laptop computer</td>
<td>70</td>
</tr>
<tr>
<td>Smartphone</td>
<td>66</td>
</tr>
<tr>
<td>Tablet</td>
<td>37</td>
</tr>
</tbody>
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Smartphones could close this gap by next year.
Amid many choices, Mom chooses Pandora as the clear leader for Internet-only audio

% of Moms who have ever used each Internet-only audio source

- Pandora: 56%
- iHeart Radio: 25%
- iTunes Radio: 12%
- Spotify: 10%
- Rhapsody: 10%
- Google Play All Access: 6%
- Radio.com: 5%
- Slacker: 5%
- TuneIn Radio: 4%

Usage is through many sources including: computer, cell phone, tablet and television.
Mom Needs an Internet Connection
Almost all Moms are online

92% Moms with Internet access from any location
Mom connects online at home

86%
Moms with Internet access at home
Wi-Fi remains a necessity for Mom

% of Moms With Wi-Fi Network in Household

- 2011: 60%
- 2012: 74%
- 2013: 75%
- 2014: 74%
Mom now shares even more of her TV viewing time with Internet usage when at home.

% of Moms who use Internet while watching TV

2013: 66%
2014: 76%

Base: Moms with Internet access at home
Liking, Sharing and Posting
Mom’s social media usage

Moms who have a profile page on any social networking website or use Pinterest, Instagram, Tumblr or Twitter

78%
About half of social media Moms check in multiple times on a daily basis.

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

- 2014: 49%
- 2013: 47%
- 2012: 46%
- 2011: 37%
- 2010: 32%
- 2009: 18%
- 2008: 11%

Base: Moms with a profile page on a social networking site.

Moms continue to check in regularly on social media.
Just about all Moms know about Facebook

96% of Moms have heard of Facebook
After stalling last year, is Facebook slipping with Mom?

% of Moms who have a profile page on Facebook

2008: 9
2009: 21
2010: 50
2011: 62
2012: 72
2013: 72
2014: 69

Facebook may have maxed out with Moms
Mom is a Facebook veteran

“How long have you been a Facebook user?”

% of Moms who have been on Facebook for five years or more

2014: 35%
2013: 23%
2012: 8%

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

% of Moms familiar with each

- Instagram: 70% (2013), 80% (2014)
- Pinterest: 50% (2013), 63% (2014)
- Tumblr: 32% (2013), 45% (2014)
- Vine: N/A

Vine debuts strong with Moms
Pinterest is finding its way with Mom

<table>
<thead>
<tr>
<th>% of Moms who use...</th>
<th>2013</th>
<th>2014</th>
</tr>
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<tr>
<td>Pinterest</td>
<td>22%</td>
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<td>8%</td>
</tr>
<tr>
<td>tumblr.</td>
<td>3%</td>
<td>5%</td>
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</tbody>
</table>
Mom checks Facebook more than others

Average number of times checking Facebook in 24 hours

- Moms: 6.3
- All Facebook Users: 5.6
- Dads: 5.5

Base: Those with a profile page on Facebook
For Mom, cell phone now surpasses computer for Facebook access

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

Base: Moms with a profile page on Facebook
Cell phone has made huge gains for accessing Facebook most

“Which one way do you access Facebook most?”

In 2014, Cell Phone has become the device for Facebook access
Mom’s Facebook access is more mobile than others

“Which one way do you access Facebook most?”

Base: Those with a profile page on Facebook
Mom is still making friends on Facebook

Average number of Facebook friends for Moms

2013: 303 friends
2014: 352 friends

Base: Moms with a profile page on Facebook
Moms are Facebook ‘friendlier’ than Dads

352
Average number of Facebook friends for Moms

2014

327
Average number of Facebook friends for Dads

Base: Those with a profile page on Facebook
Mom is a follower 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
Twitter usage sees steady progress with Mom

- 2011: 9%
- 2012: 10%
- 2013: 13%
- 2014: 18%

The percentage of Moms who ever use Twitter
Mom’s Media Habits
TV reigns in Mom’s bedroom

% of Moms who have each in the bedroom

70% Television
47% Radio
33% Computer
Mom wants easy, hands-free media in the morning

“Which ONE of the following do you do MOST often at home in the morning?”

- Watch TV: 36%
- Use Internet on a computer: 15%
- Use an app or browse Internet on a cell phone: 17%
- Read printed newspaper: 5%
- Other: 6%
- Listen to radio: 21%

[Pie chart showing the distribution of activities]
Many Moms value keeping up-to-date with music

“How important is it to you to keep up-to-date with music?”

- Very important: 14%
- Somewhat important: 38%
- Not at all important: 48%
A cell phone FM tuner could mean more listening for Mom

“If your cell phone had an FM radio tuner, would it lead you to listen to FM radio A LOT more, a LITTLE more or would it have no effect?”

37% of Cell Phone Moms would listen more to radio
- Listen a little more 15%
- Listen a lot more 22%
- No effect 63%

Base: Moms who own a cell phone and have listened to AM or FM radio stations in the last week
Conclusions
Mobile takeaways from Mom in 2014

• Smartphones increase their already indispensable status, used heavily for social networking and Internet access
• Smartphone ownership among Moms is well above those 12+
• Texting is a popular channel of communication, being used multiple times daily
• Tablets are settling in with Mom’s lifestyle
While profiles are down, Facebook remains the social media network and Mom continues to gain new friends.

TV and radio still have space in Mom’s home, but are increasingly shared and integrated with Internet.

Online radio has been discovered and is bringing audio into new spaces; on both computer and smartphone.

Radio still has value but it must adapt in order to stay relevant amid a diverse pool of mobile options.
Moms and Media 2014

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