Methodology Overview

• In February 2012, Arbitron and Edison Research conducted a national telephone survey (landline and cell phone) of 2,020 people aged 12 and older

• The sample yielded 299 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
Today’s Moms are mobile, complex consumers

Moms remain the most targeted demographic in advertising and marketing. She is not your average consumer: her busy lifestyle dictates how she shops, communicates and interacts.
Today’s Moms rely on technology

Mom is on the go and seeks technology that can keep up with her

She is much too dynamic and tech-savvy for “old school” marketing approaches
Today’s Moms are social and responsive

Moms today want an experience; she wants to know she is understood by those trying to appeal to her.

Advertisers and marketers are creating new ways to reach Moms through social media, blogs and online panels.
Moms and Media 2012

Themes that emerged from Moms and Media this year:

• Internet is essential and increasingly mobile with Moms
• Social networking, specifically Facebook, is solid and thriving
• Moms are curious about ‘Daily Deals’ websites and services
• Smartphones are becoming a necessity
• Traditional and modern media continue to blend in “The Motherhood”
About half of Moms are over 35

Age:

18-24 13%
25-34 36%
35-44 31%
45+ 20%
Most Moms are employed

Employment status:

- Full-time: 39%
- Part-time: 21%
- Temporarily unemployed: 4%
- Homemaker: 24%
- Student: 9%
- Retired: 3%
Moms Are Connected
Just about all Moms are online

93%
Percentage of Moms with Internet access from any location
Over a decade, Internet has become ‘Most Essential’ to Mom

“Among the Internet, Newspapers, Radio and Television, which ONE is most essential to your life?”

% of Moms saying Internet has soared in 10 years

- 2002: 17%
- 2012: 58%
Internet now takes a lot more of Moms’ time

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

- 2012: 2:43
- 2002: 0:53
Moms are outpacing others 12+ with time spent online

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

- 2012: Moms 2:43, Total Respondents 12+ 2:25
- 2011: Moms 2:36, Total Respondents 12+ 2:22
- 2010: Moms 2:04, Total Respondents 12+ 1:56
- 2009: Moms 1:47, Total Respondents 12+ 1:46
- 2008: Moms 1:34, Total Respondents 12+ 1:32
- 2007: Moms 1:31, Total Respondents 12+ 1:30
Since 2002, Moms are spending about an hour more with media per day

Self-reported time spent with Internet, television, radio and newspapers in the last 24 hours (HH:MM)

2002: 7:33
2012: 8:26
Wi-Fi at home surges with Mom

% of Moms with Wi-Fi network in household

2011: 60%
2012: 74%
Moms connect online at home using many devices

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

On average, Moms have about 4 devices connected.

<table>
<thead>
<tr>
<th>Number of Devices</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>One or Two</td>
<td>36</td>
</tr>
<tr>
<td>Three or Four</td>
<td>29</td>
</tr>
<tr>
<td>Five or more</td>
<td>35</td>
</tr>
</tbody>
</table>

Base: Moms with Wi-Fi at home
Tablets are gaining momentum with Moms

- Moms: 22%
- Total Respondents 12+: 16%

Base: Those owning an iPad or Android based tablet
Moms Are Even More Social
Facebook is common language to Moms

94%

Percentage of Moms who have heard of Facebook
Moms have a high profile on Facebook

% of Moms who have a profile page on Facebook

Growth continues with room still for more
Moms are not ready to kick the social networking habit

% of Moms using social networking websites **several times** per day

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

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

Smartphones allow for access any time and many times.
Moms are checking Facebook the most

Average number of times checking Facebook in 24 hours

- Moms: 4.7
- All Facebook Users: 4
- Dads: 2.1

Base: Those with a profile page on Facebook
Moms are more likely to access Facebook via cell phone

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

Base: Those with a profile page on Facebook
With Moms, cell phones are closing in on computers for accessing Facebook most

“Which one way do you access Facebook most?”

<table>
<thead>
<tr>
<th>Device Type</th>
<th>Moms</th>
<th>All Facebook Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop or laptop</td>
<td>53</td>
<td>61</td>
</tr>
<tr>
<td>Cell phone</td>
<td>41</td>
<td>32</td>
</tr>
<tr>
<td>Tablet</td>
<td>5</td>
<td>4</td>
</tr>
</tbody>
</table>

Base: Those with a profile page on Facebook

With Moms, cell phone poses a true challenge to computer
Moms make friends on Facebook

“Approximately how many Facebook friends do you have?”

On average, Moms have 255 Facebook friends

<table>
<thead>
<tr>
<th>Category</th>
<th>Percent</th>
<th>Base: Moms with a profile page on Facebook</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fewer than 100</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>100-199</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>200-299</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>300-499</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>500 or more</td>
<td>12</td>
<td></td>
</tr>
</tbody>
</table>
Teenage kids are friends too

77%

The percentage of Moms who are Facebook friends with their children

Base: Facebook Moms with children aged 12-17
Dads have more friends on Facebook

263
Average number of Facebook friends for Dads

255
Average number of Facebook friends for Moms
One-quarter of Facebook Moms would choose Facebook over TV

“Suppose you could never watch television again or you could never use Facebook again. Which would you be more willing to eliminate from your life?”

25

TV wins here, but Facebook makes an impression with Moms

74

Keep Facebook (eliminate TV) Keep TV (eliminate Facebook)

Base: Moms with a profile page on Facebook
Moms are aware of Twitter

% of Moms who have heard of Twitter

- Yes: 87%
- No: 13%
Moms still don’t Tweet in 2012

The percentage of Moms who ever use Twitter

- 2011: 9%
- 2012: 10%
Moms hear about Tweets but still don’t engage

“How often do you hear about Twitter feeds - commonly called Tweets - through traditional media outlets such as TV, radio, newspapers or websites other than Twitter?”

- Almost every day: 51%
- Regularly, but not daily: 21%
- Sometimes: 13%
- Rarely: 7%
- Never: 8%

Base: Moms who have heard of Twitter
A New Kind of Deal
More than one-quarter of Moms use ‘Daily Deals’

% of Moms who are registered ‘Daily Deals’ users

- Registered 'Daily Deals' users: 28%
- Non-users: 72%
Moms have discovered ‘Daily Deals’ faster than the total 12+

% who are registered ‘Daily Deals’ users

Moms: 28
Total Respondents 12+: 15
Groupon is *the* ‘Daily Deal’ for Moms

“Which daily deals services are you registered with?”

- **Groupon**: 91 percent
- **LivingSocial**: 36 percent
- **Any Others**: 11 percent

Base: Moms who are registered users of a daily deals site
One-third of Moms came for the deal but didn’t return

“Which best describes your experience with ‘daily deals’ services such as Groupon or Living Social?”

- Tried business for the deal and continued to visit: 24%
- Tried business for the deal but haven’t returned: 36%
- Already been a customer of the business whose deal you used: 26%
- Registered but never bought: 14%

Base: Moms who are registered users of a daily deals site
Moms Are Mobile
Moms are accessible by cell phone

92%

Percentage of Moms who own a cell phone
Smartphones reign supreme with Moms

% who own a smartphone

<table>
<thead>
<tr>
<th>Year</th>
<th>Moms</th>
<th>Total Respondents 12+</th>
</tr>
</thead>
<tbody>
<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>
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</tbody>
</table>

Moms continue to grow the smartphone boom
Android and iPhone score big gains in ownership with Moms

% of Moms who own each type of smartphone

<table>
<thead>
<tr>
<th>Phone using Android operating system</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>32</td>
<td>17</td>
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</table>

<table>
<thead>
<tr>
<th>iPhone</th>
<th>2012</th>
<th>2011</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>25</td>
<td>10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Blackberry</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
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<td></td>
<td>11</td>
<td>15</td>
</tr>
</tbody>
</table>

Android and iPhone had huge ownership growth in the last year.
Moms won’t part with the smartphone; not even for TV

“Suppose you could never watch television again or you could never use your smartphone again. Which would you be more willing to eliminate from your life?”

percent

67

31

The functionality of smartphones is not overlooked

Keep smartphone (eliminate TV)  Keep TV (eliminate smartphone)

Base: Moms who own a smartphone that is not an iPhone
iPhone has even more loyalty over TV with Moms than non-iPhone smartphones

“Suppose you could never watch television again or you could never use your iPhone again. Which would you be more willing to eliminate from your life?”

More than two-thirds of iPhone Moms would give up TV to keep their phone

Base: Moms who own an iPhone

Keep iPhone (eliminate TV) 70%

Keep TV (eliminate iPhone) 27%
Most Moms say cell phone is always close by

“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

76

Cell phone Moms

93

Smartphone Moms
Smartphone Moms match 12+ Smartphone users for keeping the phone nearby

“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

<table>
<thead>
<tr>
<th></th>
<th>Total Smartphone Users</th>
<th>Smartphone Moms</th>
</tr>
</thead>
<tbody>
<tr>
<td>91</td>
<td>93</td>
<td></td>
</tr>
</tbody>
</table>

edison
research

ARBITRON
Moms blend traditional and modern media habits
With Moms, TV gets more real estate at home

Average number of each device in the home

- Computers: 2.1
- Radios: 2.4
- Televisions: 3.3
The majority of Moms listen to AM/FM radio

“Have you listened to any AM or FM radio stations in the last week?”

- Yes: 86%
- No: 14%
Moms still choose radio for new music, but Internet is gaining

"Which do you turn to first to learn about new music?"

In 2012, it is a close race

- Internet: 8% (2002), 38% (2012)
- Television: 12% (2002), 13% (2012)
- Radio: 72% (2002), 42% (2012)
In the AM, Moms choose media they can multi-task with

“Which are you most likely to use first thing in the morning?”

<table>
<thead>
<tr>
<th>Media</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>28</td>
</tr>
<tr>
<td>Television</td>
<td>33</td>
</tr>
<tr>
<td>Radio</td>
<td>33</td>
</tr>
<tr>
<td>Newspapers</td>
<td>5</td>
</tr>
</tbody>
</table>
Moms listen to the radio at work

45%

Percentage of Moms who listen to the radio while at work

Base: Moms who are employed full or part time
Smartphones are making a mark on at-work listening

“Thinking about how you listen to the radio while at work, do you most often listen to radio stations…”

- On a regular radio: 66%
- On your computer over the Internet: 18%
- On a mobile device such as a smartphone: 15%

Mobile devices are changing the way Moms listen to radio at work in 2012

Base: Moms who listen to the radio while at work
Moms like them Apples

51%

Percentage of Moms who own an Apple iPod, iPhone or iPad
Moms are watching YouTube

% of Moms who have watched video clips or other Internet programming from YouTube…

<table>
<thead>
<tr>
<th></th>
<th>Ever</th>
<th>Last Month</th>
<th>Last Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number (%)</td>
<td>64</td>
<td>56</td>
<td>46</td>
</tr>
</tbody>
</table>

Base: Moms with Internet access
Moms are sharing on YouTube as well

“Have you shared a YouTube video with anyone in the last month?”

Yes 52%

No 48%

Base: Moms who have watched video clips/programming on YouTube
Despite their love of technology, Moms still like to talk via phone.

“When not in person, which ONE of the following ways do you communicate with your friends and family most often?”

- Talk on the phone: 56%
- Text message: 28%
- Use Facebook: 9%
- Email: 7%
Conclusions
What Moms told us in 2012

- Internet is firmly “Most Essential” to Moms, so they are well-connected with devices both at home and on the go
- Moms continue to contribute to the smartphone boom, and are finding new ways to incorporate them into everyday life
- Moms consume social media and rely on modern technology but they balance them with traditional forms as needed
- Facebook has growing appeal with Moms, while Twitter remains flat