Moms and Media 2015
Mom in 2015 remains connected and even more mobile

Strong Mobile Tendencies + Commitment to Social Media + Household CEO = Today’s Mom
Why is Mom’s opinion so important?

- She’s coordinating the household; making decisions
- Her mobile lifestyle makes her constantly accessible
- She shows no sign of slowing her mobile behavior
- She is engaged and very active on social media
- Technology is good fit with her busy, on-the-go schedule
- Mom will continue to welcome new media into her day
Methodology Overview

• In January 2015, Edison Research conducted a national telephone survey (landline and cell phone) of 2002 people aged 12 and older

• The sample yielded 370 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 to 1998

• Research sponsored by Triton Digital
About one-third of Moms are under age 35

Age:

- 18-24: 8%
- 25-34: 27%
- 35-44: 33%
- 45+: 32%
Well over half of Moms are employed

Employment status:

- Full time: 43%
- Part time: 15%
- Homemaker: 25%
Mom is mobile
Nearly all Moms have a cell phone in 2015
Mom soars ahead with smartphone ownership

% who own a smartphone


Moms
Total Respondents

2009: 8%
2010: 10%
2011: 14%
2012: 31%
2013: 61%
2014: 69%
2015: 71%

2009: 36%
2010: 36%
2011: 53%
2012: 61%
2013: 84%
2014: 64%
2015: 71%
Mom prefers texting

“How often do you communicate with others via…”

Percent saying “Frequently”

<table>
<thead>
<tr>
<th>Method</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calling</td>
<td>70</td>
</tr>
<tr>
<td>Texting</td>
<td>79</td>
</tr>
<tr>
<td>Video Chatting</td>
<td>8</td>
</tr>
<tr>
<td>Emailing</td>
<td>43</td>
</tr>
</tbody>
</table>

Base: Moms who own a cell phone
Tablets continue to be a welcome addition in Mom’s toolkit

Tablet ownership

2012 22%
2013 33%
2014 47%
2015 64%

Moms owning any type of tablet
Music is mobile for smartphone Moms

% of Smartphone Moms who have downloaded each app

- Pandora: 50%
- iHeartRadio: 21%
- iTunes Radio: 14%
- Spotify: 12%
- Amazon Music: 7%
Moms go mobile to hear online radio while in the car

% of Cell Phone Moms who have EVER listened to online radio through the stream from a cell phone connected to the car audio system

42%
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>
</tr>
</thead>
<tbody>
<tr>
<td>Ever</td>
<td>78</td>
<td>69</td>
</tr>
<tr>
<td>In The Last Month</td>
<td>60</td>
<td>53</td>
</tr>
<tr>
<td>In The Last Week</td>
<td>48</td>
<td>44</td>
</tr>
</tbody>
</table>

Includes AM or FM radio stations on the Internet and Internet-only audio sources.
Average time spent weekly with online radio

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

2015
13 hours 36 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
How Mom finds weekly time with online radio

Time spent with online radio is replacing time that used to be spent listening to...

- Local AM/FM radio: 42%
- Owned CDs and digital music files: 32%
- New time, not taken from other audio sources: 24%
- SiriusXM: 2%

How Mom finds weekly time with online radio

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How Mom finds weekly time with online radio

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For Mom’s online radio, smartphones are now the primary devices for listening

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

- **Desktop/laptop computer**: 70% (2014) vs. 61% (2015)
- **Smartphone**: 66% (2014) vs. 72% (2015)
- **Tablet**: 37% (2014) vs. 38% (2015)

Smartphones are used more than computer now in 2015.
Half of Moms have used Pandora

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

- Pandora: 52%
- iHeartRadio: 24%
- iTunes Radio: 20%
- Spotify: 13%
- Amazon Music: 10%
Almost all Moms are online

94% Moms with Internet access from any location

Home Library Work School
Mom is going online in multiple locations

“At how many locations do you go online?”

- Home
- Work
- School
- Library

69% of Moms with Internet access go online in two or more locations
Nine out of ten Moms connect online at home
Wi-Fi continues to be necessary; gets a bump in 2015

% of Moms With Wi-Fi Network in Household

- 2011: 60%
- 2012: 74%
- 2013: 75%
- 2014: 74%
- 2015: 81%
Average time spent with Internet

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

Moms spend :16 more online

Moms: 3:07

Total Respondents: 2:51
Rewind fifteen years, Mom’s average time spent with Internet

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

2000

Moms: 0:24

2015

Moms: 3:07

Mom’s time with the Internet is almost eight times what it was in 2000
Three in ten Moms are heavy Internet users

30% of Moms spent four hours or more online in the last 24 hours
Internet secures itself as most essential for Moms

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

The Internet is a one stop media shop for multi-tasking moms

<table>
<thead>
<tr>
<th>Media</th>
<th>2010</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>48</td>
<td>59</td>
</tr>
<tr>
<td>Television</td>
<td>32</td>
<td>30</td>
</tr>
<tr>
<td>Radio</td>
<td>15</td>
<td>7</td>
</tr>
<tr>
<td>Newspaper</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>
Mom accesses the Internet most via computer but cell phone is not far behind

"Which one way do you access the Internet most?"

- 45% Desktop/laptop computer
- 39% Cell phone
- 13% Tablet

Base: Moms with Internet access at home
Ever the Social Mom
Moms who use any social networking website or service: 86%
Now more than half of social media Moms check in multiple times daily

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

<table>
<thead>
<tr>
<th>Year</th>
<th>% of Moms</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>54</td>
</tr>
<tr>
<td>2014</td>
<td>49</td>
</tr>
<tr>
<td>2013</td>
<td>47</td>
</tr>
<tr>
<td>2012</td>
<td>46</td>
</tr>
<tr>
<td>2011</td>
<td>37</td>
</tr>
<tr>
<td>2010</td>
<td>32</td>
</tr>
<tr>
<td>2009</td>
<td>18</td>
</tr>
<tr>
<td>2008</td>
<td>11</td>
</tr>
</tbody>
</table>

Base: Moms who currently use social networking Web sites/services
Pinterest sees a surge with Mom in 2015

<table>
<thead>
<tr>
<th>% of Moms who use...</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pinterest</td>
<td>22%</td>
<td>29%</td>
<td>43%</td>
</tr>
<tr>
<td>Instagram</td>
<td>17%</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>Vine</td>
<td>N/A</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>tumblr</td>
<td>3%</td>
<td>5%</td>
<td>3%</td>
</tr>
</tbody>
</table>
Facebook is firmly Mom’s choice for social media

97% of Moms have heard of Facebook

78% of Moms use Facebook
Almost three quarters of Moms use Facebook most

Social media Moms who use Facebook most

72%
Half of smartphone Moms check in multiple times daily

51% of Smartphone Moms use Facebook several times a day
Mom checks in often to get her daily Facebook fix

Average number of times checking Facebook in 24 hours

- Moms: 7.4
- All Facebook Users: 5.9

Base: Those who used Facebook in the last month
Mom is more likely than others to access Facebook via mobile

“Which one way do you access Facebook most?”

<table>
<thead>
<tr>
<th>Device</th>
<th>Moms</th>
<th>Total Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop or laptop computer</td>
<td>20</td>
<td>29</td>
</tr>
<tr>
<td>Cell phone</td>
<td>67</td>
<td>60</td>
</tr>
<tr>
<td>Tablet</td>
<td>13</td>
<td>10</td>
</tr>
</tbody>
</table>

Mobile means posting anytime, anywhere

Base: Those who used Facebook in the last month
Mom has a few hundred friends on Facebook

Average number of Facebook friends for Moms

Base: Moms who used Facebook in the last month

2015
313 friends
If Facebook went away, what would Mom use instead?

Base: Moms who use Facebook more than other social networking sites and services

- Snapchat 3%
- Google Plus 7%
- Pinterest 8%
- Other 9%
- Twitter 14%
- Instagram 27%
- No other site 31%
Twitter usage holds steady in 2015 with Mom

- 2011: 9%
- 2012: 10%
- 2013: 13%
- 2014: 18%
- 2015: 17%

Percentage of Moms who ever use Twitter
A consumer leader, Mom is also a follower

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

44 percent of Moms and 41 percent of All Social Media Users

Base: Those who currently use social networking web sites or services
More about Mom
One-third of Moms have listened to a podcast

% who have listened to a podcast:

- Ever: 34%
- In The Last Month: 17%
- In The Last Week: 9%

(percent)
For podcasts, mobile devices are preferred by Mom

“On which of the following do you most often listen to audio podcasts?”

Base: Moms who have listened to a podcast

- Computer: 39%
- Smartphone, tablet or other portable audio player: 61%
Home is where the podcast is for Mom

“Where do you listen most often to podcasts?”

- Home: 60%
- Work: 18%
- Car: 11%
- Gym: 6%

Base: Moms who have listened to a podcast
The majority of Moms value keeping up-to-date with music

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

- Very important: 16%
- Somewhat important: 38%
- Not at all important: 46%

More than half of Moms think it is important to keep up with new music.
Mom goes to YouTube for music

“Have you ever used YouTube specifically to watch music videos or to listen to music?”

Yes
74%

No
26%
“Over the last ten years, would you say the changes to society from technology have been…”

- Positive: 57%
- Equally positive and negative: 30%
- Negative: 13%

Mom’s take on technology…she likes it
Conclusions
What we learned from Mom in 2015

- Internet owns a large part of Mom’s time
- Her smartphone remains indispensable
- Smartphone ownership among Moms remains well above 12+
- Tablets have secured their place with Mom
- Facebook is firmly Mom’s social media network
- Mom favors technology and is finding ‘new time’ to devote to it