For Mom, 2016 brings the usual tech tools plus new media

- Smartphones
- Internet
- Social Media
- Podcasting
- Online Radio
- Audiobooks
Why do we pay attention to Mom’s behavior?

- She’s making purchasing decisions for herself and the entire household
- Her lifestyle is mobile, allowing for engagement at any time or anywhere
- She is very active on social media, using multiple sites
- As a multi-tasker, Mom will find time for new media in her day
- She isn’t afraid to try new technology
Methodology Overview

• In January 2016, Edison Research conducted a national telephone survey (landline and cell phone) of 2001 people aged 12 and older.

• “Mom” is defined as a woman having a child under 18 living in her household.

• The sample yielded 319 Moms.

• This study is from the Infinite Dial series which dates to 1998.
  • 2016 marks the sixth installation of the Moms and Media report.

• Research sponsored by Triton Digital.
Two-thirds of Moms are age 35 or older

Age:

- 18-24: 6%
- 25-34: 27%
- 35-44: 37%
- 45 and older: 30%
The majority of Moms are employed

Employment status:

- Full time: 48%
- Part time: 15%
- Homemaker: 22%
Mobile Mom
Nine in ten Moms are cell phone equipped in 2016

91% of Moms own a cell phone
Smartphones have claimed the mobile space

% who own a smartphone

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moms</td>
<td>8%</td>
<td>79%</td>
</tr>
<tr>
<td>Total Respondents</td>
<td>10%</td>
<td>76%</td>
</tr>
</tbody>
</table>
Tablets hold steady with Moms

Tablet ownership

- 2012: 22%
- 2013: 33%
- 2014: 47%
- 2015: 64%
- 2016: 64%

Moms owning any type of tablet
Online radio finds a place with Mom

% who have listened to online radio:

- Ever: 74% Moms, 69% Total Respondents
- In The Last Month: 61% Moms, 57% Total Respondents
- In The Last Week: 53% Moms, 50% Total Respondents

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

2016

12 hours 19 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
Mom finds weekly time for online radio

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

- Local AM/FM radio: 34%
- Owned CDs and digital music files: 17%
- SiriusXM: 3%
- New time, not taken from other audio sources: 46%

*Base: Moms who have listened to Internet radio in the last week*
Computers are fading for Mom’s online radio

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

<table>
<thead>
<tr>
<th>Category</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop/laptop computer</td>
<td>70</td>
<td>61</td>
<td>39</td>
</tr>
<tr>
<td>Smartphone</td>
<td>66</td>
<td>72</td>
<td>70</td>
</tr>
<tr>
<td>Tablet</td>
<td>37</td>
<td>38</td>
<td>35</td>
</tr>
</tbody>
</table>
More than half of Moms have used Pandora

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

- Pandora: 53%
- iHeartRadio: 21%
- Apple Music: 15%
- Spotify: 11%
- Amazon Music: 11%
A third of Moms have used Pandora in the last week

% of Moms who have used each Internet-only audio source in the past week:

- Pandora: 34%
- iHeartRadio: 12%
- Apple Music: 8%
- Spotify: 8%
- Amazon Music: 6%
Moms Love Internet
Almost all Moms are online

93% Moms with Internet access from any location
Two thirds of Moms are going online in multiple locations

“At how many locations do you go online?”

- Home
- Work
- School
- Library

65% of Moms go online in two or more locations
Wi-Fi remains constant with Mom

% of Moms With Wi-Fi Network in Household

- 2011: 60%
- 2012: 74%
- 2013: 75%
- 2014: 74%
- 2015: 81%
- 2016: 83%
Average time spent with Internet is down a pinch in 2016

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

- 2016: 2:58
- 2015: 3:07
Half of Moms access the Internet most via cell phone

“Which one way do you access the Internet most?”

- **51%** Cell phone
- **41%** Desktop/laptop computer
- **8%** Tablet

*Base: Moms with Internet access at home*
Mom’s social media usage

Moms who use any social networking website or service

88%
The majority of social media Moms check in multiple times daily

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

Base: Moms who currently use social networking Web sites/services
Most smartphone Moms check in multiple times daily.

62% of Smartphone Moms use social media several times a day.
Moms are using multiple social media sites during the week

% of Moms using each social networking Web site in the past week

- Facebook: 74%
- Pinterest: 31%
- Instagram: 19%
- Google+: 10%
- Snapchat: 10%
- LinkedIn: 9%
- Twitter: 7%
- WhatsApp: 6%
- Vine: 4%
- Tumblr: 2%
- Kik: 2%
Half of Moms now use Pinterest

<table>
<thead>
<tr>
<th>% of Moms who use...</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pinterest</td>
<td>22%</td>
<td>29%</td>
<td>43%</td>
<td>51%</td>
</tr>
<tr>
<td>Instagram</td>
<td>17%</td>
<td>24%</td>
<td>26%</td>
<td>29%</td>
</tr>
</tbody>
</table>
Mom remains committed to Facebook

96% of Moms have heard of Facebook

79% of Moms use Facebook

78% of Social Media Moms use Facebook most
Almost a third of Moms use Facebook to follow politics

30% of Moms use Facebook to follow political news or candidates
Moms compulsively check Facebook daily

Average number of times checking Facebook in 24 hours

- Smartphone Moms: 10.5
- Moms: 10.1
- All Facebook Users: 6.9

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

"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>16</td>
<td>27</td>
</tr>
<tr>
<td>Cell phone</td>
<td>75</td>
<td>64</td>
</tr>
<tr>
<td>Tablet</td>
<td>9</td>
<td>9</td>
</tr>
</tbody>
</table>

Base: Those who used Facebook in the last month
Twitter slips a bit in 2016 with Mom

Percentage of Moms who ever use Twitter

- 2011: 9%
- 2012: 10%
- 2013: 13%
- 2014: 18%
- 2015: 17%
- 2016: 15%
Multimedia Mom
Moms still listen to AM/FM radio

“Have you listened to any AM/FM radio stations, either over the air or online, in the last week?”

- Yes: 77%
- No: 23%
Traditional media is still a part of Mom’s day but actual radios are on the decline.

Self-reported hours spent with TV in the last 24 hours (HH:MM):
- 3:01 2016
- 3:05 2008

Average number of different radios in the home:
- 1.9 2016
- 3.1 2008
Podcasts continue to gain some traction with Mom

% who have listened to a podcast:

- Ever: 34% (2015), 37% (2016)
- In The Last Month: 17% (2015), 21% (2016)
- In The Last Week: 9% (2015), 14% (2016)
Mobile devices reign in 2016 for Mom’s podcasts

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

<table>
<thead>
<tr>
<th>Device</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer</td>
<td>39</td>
<td>29</td>
</tr>
<tr>
<td>Smartphone, tablet or other portable</td>
<td>61</td>
<td>71</td>
</tr>
<tr>
<td>audio player</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: Moms who have listened to a podcast
Listening to podcasts in the car is on the rise for Moms

“Where do you listen most often to podcasts?”

<table>
<thead>
<tr>
<th>Location</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>60%</td>
<td>56%</td>
</tr>
<tr>
<td>Car</td>
<td>11%</td>
<td>19%</td>
</tr>
<tr>
<td>Work</td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td>Gym</td>
<td>6%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Base: Moms who have listened to a podcast
The majority of podcast Moms click and listen immediately

“Which method do you use to listen to podcasts most often?”

- Click and listen immediately: 69%
- Download manually to listen later: 18%
- Subscribe to and download automatically to listen later: 13%

Base: Moms who have listened to a podcast
Half of Moms have listened to an Audiobook

“Have you ever listened to an audiobook?”
More than 4 in 10 audiobook Moms have listened recently

“When did you most recently listen to an audiobook?”

- Past week to less than six months ago: 45%
- Six months to less than twelve months ago: 13%
- One year to less than two years ago: 16%
- More than two years ago: 26%

Base: Moms who have listened to an audiobook
Audiobook Moms consume more than six per year

Average number of audiobooks listened to in the last 12 months

6.5

Base: Moms who have listened to an audiobook in the last year
Mom takeaways from 2016

- Internet owns a large part of Mom’s time; but TV takes its cut too
- Mom is moving away from desktop to mobile for all things
- Mom uses her smartphone for non-traditional media like podcasts and online radio
- Facebook is still Mom’s preferred social media network but she dips into multiple sites
- Mom continues to favor technology and makes time for it