With a tech tool kit, Mom keeps a mobile & social lifestyle in 2017

Internet, smartphones, tablets, social media, online radio, podcasting
What we have come to expect from Mom

- She lives in the mobile space
- Her mobile lifestyle dictates how she adopts other behaviors
- She drives social media; checking in multiple times daily
- She doesn’t shy away from new media or technology
- She is a heavy media consumer
Methodology Overview

• In January 2017, Edison Research conducted a national telephone survey (landline and cell phone) of 2000 people aged 12 and older

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

• The sample yielded 284 Moms

• This study is from the Infinite Dial series which dates to 1998

• Research sponsored by Triton Digital
The majority of Moms are age 35 and older

Age:

- 18-24: 9%
- 25-34: 25%
- 35-44: 37%
- 45 and older: 29%
Two-thirds of Moms are employed

Employment status:

- Full time: 53%
- Part time: 14%
- Homemaker: 19%
Mom is Mobilized
Nearly every Mom owns a cell phone in 2017

97% of Moms own a cell phone
Smartphones gain even more ground with Moms

% who own a smartphone

<table>
<thead>
<tr>
<th>Year</th>
<th>Moms</th>
<th>Total Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>79%</td>
<td>76%</td>
</tr>
<tr>
<td>2017</td>
<td>86%</td>
<td>81%</td>
</tr>
</tbody>
</table>
Running out of battery life not a concern for Smartphone Moms

“How often do you feel anxiety about your smartphone running out of battery life?”

Base: Moms who own a smartphone

- Frequently: 16%
- Sometimes: 18%
- Hardly ever: 34%
- Never: 32%
Few Smartphone Moms worry about data plan overage

“How often do you feel anxiety about going over your mobile data plan?”

- Never: 57%
- Rarely: 23%
- Sometimes: 11%
- Frequently: 9%

Base: Moms who own a smartphone
Tablets lose momentum with Moms

% of Moms who own a tablet

- 2012: 22%
- 2013: 33%
- 2014: 47%
- 2015: 64%
- 2016: 64%
- 2017: 65%
Online radio streams forward with Moms

% of Moms who have listened to online radio:

- Ever: 78% in 2015, 74% in 2016, 80% in 2017
- In The Last Month: 60% in 2015, 61% in 2016, 71% in 2017
- In The Last Week: 48% in 2015, 53% in 2016, 59% in 2017

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

2017
13 hours
54 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
One-third of Moms find *new* weekly time for online radio

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

- **Local AM/FM radio**: 33%
- **Owned CDs and digital music files**: 28%
- **SiriusXM**: 5%
- **New time, not taken from other audio sources**: 34%

*Base: Moms who have listened to Internet radio in the last week*
Smartphones remain strong for Moms’ online radio

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

<table>
<thead>
<tr>
<th>Device</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>66%</td>
<td>72%</td>
<td>70%</td>
<td>71%</td>
</tr>
<tr>
<td>Desktop/laptop computer</td>
<td>70%</td>
<td>61%</td>
<td>39%</td>
<td>48%</td>
</tr>
<tr>
<td>Tablet</td>
<td>37%</td>
<td>38%</td>
<td>35%</td>
<td>30%</td>
</tr>
</tbody>
</table>
Moms listen to Internet Audio for flexibility and choice

<table>
<thead>
<tr>
<th>Reasons</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>To listen to playlists that reflect your mood or taste at a given moment</td>
<td>80%</td>
</tr>
<tr>
<td>For the ability to skip songs</td>
<td>78%</td>
</tr>
<tr>
<td>For the ability to immediately hear a specific song</td>
<td>75%</td>
</tr>
<tr>
<td>To hear songs or music that you don’t often hear on FM radio</td>
<td>71%</td>
</tr>
<tr>
<td>Because there are fewer commercials</td>
<td>68%</td>
</tr>
<tr>
<td>To discover new songs</td>
<td>57%</td>
</tr>
<tr>
<td>To listen to your favorite FM radio stations on your favorite mobile device</td>
<td>44%</td>
</tr>
<tr>
<td>For the ability to store your music collection online</td>
<td>41%</td>
</tr>
</tbody>
</table>

Base: Moms who have ever listened to Internet radio
More than half of Moms use Pandora

% of Moms who currently ever use each Internet-only audio source
Internet connected
Nearly every Mom is online

97% Moms with Internet access from any location
Moms gives most of their daily media time to the Internet

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

- Listening to radio: 1:44
- Watching television: 2:18
- Using the Internet: 3:31
Most Moms choose cell phone for accessing the Internet most

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

<table>
<thead>
<tr>
<th>Device</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop/laptop computer</td>
<td>45</td>
<td>41</td>
<td>36</td>
</tr>
<tr>
<td>Cell phone</td>
<td>39</td>
<td>51</td>
<td>55</td>
</tr>
<tr>
<td>Tablet</td>
<td>13</td>
<td>8</td>
<td>9</td>
</tr>
</tbody>
</table>

Base: Moms with Internet access at home
Socially connected
In 2017, more than 9 in 10 moms use social media

Moms who use any social networking website or service

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>73%</td>
</tr>
<tr>
<td>2014</td>
<td>78%</td>
</tr>
<tr>
<td>2015</td>
<td>86%</td>
</tr>
<tr>
<td>2016</td>
<td>88%</td>
</tr>
<tr>
<td>2017</td>
<td>93%</td>
</tr>
</tbody>
</table>
Social Media Moms continue to check in multiple times daily

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

- 2017: 62%
- 2016: 56%
- 2015: 54%
- 2014: 49%
- 2013: 47%
- 2012: 46%
- 2011: 37%
- 2010: 32%
- 2009: 18%
- 2008: 11%

Base: Moms who currently use social networking Web sites/services
Two-thirds of Smartphone Moms check in multiple times daily

67% of Smartphone Moms use social media several times a day
Moms get social with multiple sites during the week

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

<table>
<thead>
<tr>
<th>Social Site</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>74</td>
<td>78</td>
</tr>
<tr>
<td>Instagram</td>
<td>19</td>
<td>30</td>
</tr>
<tr>
<td>Pinterest</td>
<td>31</td>
<td>29</td>
</tr>
<tr>
<td>Snapchat</td>
<td>10</td>
<td>23</td>
</tr>
<tr>
<td>WhatsApp</td>
<td>6</td>
<td>15</td>
</tr>
<tr>
<td>Twitter</td>
<td>7</td>
<td>13</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>9</td>
<td>10</td>
</tr>
</tbody>
</table>
Snapchat and other social sites catch Moms’ attention in 2017

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

- **Instagram**: 19 (2016) vs 30 (2017)
- **Snapchat**: 10 (2016) vs 23 (2017)
- **Twitter**: 7 (2016) vs 13 (2017)
Snapchat is finding a place with Moms

<table>
<thead>
<tr>
<th>Year</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>22%</td>
<td>29%</td>
<td>43%</td>
<td>51%</td>
<td>47%</td>
</tr>
<tr>
<td></td>
<td>17%</td>
<td>24%</td>
<td>26%</td>
<td>29%</td>
<td>37%</td>
</tr>
<tr>
<td></td>
<td>--</td>
<td>--</td>
<td>10%</td>
<td>13%</td>
<td><strong>29%</strong></td>
</tr>
</tbody>
</table>
Facebook is still the one for Moms

84% of Moms use Facebook

72% of Social Media Moms use Facebook most
Twitter comes back some in 2017 with Moms

% of Moms who ever use Twitter

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>9%</td>
<td>10%</td>
<td>13%</td>
<td>18%</td>
<td>17%</td>
<td>15%</td>
<td>21%</td>
</tr>
</tbody>
</table>
Podcasts and other media
Podcasts gain even more traction with Moms

% who have listened to a podcast:

- Ever: 34% (2015), 37% (2016), 46% (2017)
- In the last month: 17% (2015), 21% (2016), 29% (2017)
- In the last week: 9% (2015), 14% (2016), 19% (2017)
Mobile devices win over computer for Moms’ podcasts

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

- Smartphone, tablet or other portable audio player: 66%
- Computer: 34%

Base: Moms who have listened to a podcast
Most Moms listen to podcasts at home; but other places are showing a bit of growth

“Where do you listen most often to podcasts?”

<table>
<thead>
<tr>
<th>Location</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>60%</td>
<td>56%</td>
<td>54%</td>
</tr>
<tr>
<td>Work</td>
<td>18%</td>
<td>16%</td>
<td>17%</td>
</tr>
<tr>
<td>Car</td>
<td>11%</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>Someplace else</td>
<td>8%</td>
<td>9%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Base: Moms who have listened to a podcast
Average time spent weekly with podcasts

Self-reported hours spent with **podcasts** in the last week

- **4 hours 40 minutes**

Podcast Moms listened to an average of **7** podcasts in the last week

*Base: Moms who have listened to podcasts in the last week*
Most 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: 21%
- Subscribe to and download automatically to listen later: 10%

Base: Moms who have listened to a podcast
Moms are checking YouTube for videos and music

% of Moms who have used YouTube specifically to watch videos or listen to music:

- Ever: 67% in 2016, 73% in 2017
- In the last month: 55% in 2016, 63% in 2017
- In the last week: 42% in 2016, 43% in 2017
Moms are onboard with on-demand video

- 67% of Moms have a subscription to Netflix, Hulu or Amazon Prime
- 59% of Moms have a subscription to Netflix
- 55% of Moms have used Netflix, Hulu or Amazon Prime in the last week
- 50% of Moms have used Netflix in the last week
Nearly 4 in 10 Moms subscribe to Amazon Prime

“Are you a subscriber to the service from Amazon.com called Amazon Prime?”

- Yes: 38%
- No: 62%
Many 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: 65%
- No: 35%
Smart speakers are new to Moms’ radar

% of Moms who have heard of each type of smart speaker

- Amazon Alexa*: 53%
- Google Home: 43%

*Asked as “Amazon Echo or Amazon Dot, which uses the Alexa voice service.”
Smart speaker ownership is just beginning for Moms

% of Moms who own each type of smart speaker

- Amazon Alexa*: 5%
- Google Home: 1%

*Asked as “Amazon Echo or Amazon Dot, which uses the Alexa voice service.”
Conclusions
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Mom is highly accessible</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Just about every mom is cell phone equipped</td>
</tr>
<tr>
<td><strong>2. Mom is readily available to engage</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Smartphone ownership is huge</td>
</tr>
<tr>
<td></td>
<td>Smartphones are the preferred mobile device</td>
</tr>
<tr>
<td><strong>3. Be creative with new media to reach Mom</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Podcasts take up some of Mom’s time</td>
</tr>
<tr>
<td></td>
<td>Mom chooses ‘on-demand’ services like YouTube and Netflix</td>
</tr>
<tr>
<td><strong>4. Mom is loyal to Facebook, but not exclusive</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Snapchat is getting attention</td>
</tr>
</tbody>
</table>