Moms and Media 2019

- Taken from the Infinite Dial series which dates to 1998
- Tracking media habits and consumption of Moms since 2011
- Moms are well equipped with devices and technology
- Moms have established a tech tool kit that continues to get bigger and more robust
- Moms continue to live a mobile lifestyle with media behaviors and devices to support it
Moms and Media

WHAT THIS 2019 EDITION HIGHLIGHTS:

• The devices in the ‘Tech Tool Kit’

• How the internet is the engine for Moms’ daily media

• Online audio has a big place with Moms

• Social networking remains a key part of Moms’ day

• Other media consumption and habits
  o Podcasts
  o YouTube
  o AM/FM radio
**Study Methodology**

- In January/February 2019, Edison Research conducted a national telephone survey of 1,500 people aged 12 and older, using random digit dialing techniques to both cell phones and landlines (U.S. Population 12+).

- Telephone data weighted to national 12+ U.S. population figures.

- In addition, Edison Research also conducted a national online survey of 4,126 people aged 12 and older (U.S. Online Population 12+).

- Online data weighted to match the Infinite Dial telephone demographics of those with internet access.

- Survey offered in both English and Spanish.

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

- The sample yielded 176 Moms from the telephone survey and 534 from the online survey.
The Moms sample: Age

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>7%</td>
</tr>
<tr>
<td>25-34</td>
<td>31%</td>
</tr>
<tr>
<td>35-44</td>
<td>37%</td>
</tr>
<tr>
<td>45-54</td>
<td>20%</td>
</tr>
<tr>
<td>55+</td>
<td>5%</td>
</tr>
</tbody>
</table>

Median Age of Moms: 37
Average Age of Moms: 39
The Moms sample: Employment status

- Full-time: 56%
- Part-time: 16%
- Homemaker: 16%
- Other*: 12%

(*temporarily unemployed, student, retired, other)
Nearly all Moms now own a smartphone

% of Moms who own a smartphone

- 2016: 79%
- 2017: 86%
- 2018: 92%
- 2019: 94%
After a stall, tablets see a surge with Moms

% OF MOMS WHO OWN A TABLET

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>64</td>
</tr>
<tr>
<td>2017</td>
<td>65</td>
</tr>
<tr>
<td>2018</td>
<td>64</td>
</tr>
<tr>
<td>2019</td>
<td>75</td>
</tr>
</tbody>
</table>
Wearable tech has caught on with Moms

% of Moms who own an Internet connected watch such as the Apple Watch or Samsung Gear

- 2017: 11%
- 2018: 10%
- 2019: 29%
34% of Moms own some type of smart speaker
One third of Moms own some kind of smart speaker

% OF MOMS OWNING ANY TYPE OF SMART SPEAKER

- 6% in 2017
- 23% in 2018
- 34% in 2019
Amazon and Google lead in smart speakers for Moms

% of Moms owning Amazon Device vs. Google Home

- **Amazon Device**
  - 2017: 5
  - 2018: 21
  - 2019: 25

- **Google Home**
  - 2017: 1
  - 2018: 4
  - 2019: 16

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32% of Moms own a Bluetooth-enabled fitness tracker

INFINITE DIAL ONLINE SURVEY

THE INFINITE DIAL © 2019 EDISON RESEARCH AND TRITON DIGITAL
39% of Moms own wireless earphones or headphones
Daily, Moms spend...

- 1 hour 31 minutes listening to radio
- 2 hours 24 minutes watching television
- 3 hours 58 minutes using the internet

INFINITE DIAL PHONE SURVEY
SELF-REPORTED AVERAGE TIME SPENT WITH MEDIA IN THE LAST 24 HOURS

#MomsAndMedia
Moms are spending 24 more minutes daily with the internet in 2019 than in 2018

INFINITE DIAL PHONE SURVEY
SELF-REPORTED AVERAGE TIME SPENT WITH INTERNET IN THE LAST 24 HOURS
Moms use internet most, first thing in the morning

Among internet, newspaper, radio and television which one are you most likely to use first thing in the morning?

- Internet: 55%
- Television: 23%
- Radio: 18%
- Newspapers: 2%
- Don’t Know: 2%
98% of Moms have internet access from any location
90% of Moms access the internet from their cell phones

INFINITE DIAL PHONE SURVEY
For new music, most Moms go to the internet

Among internet, newspaper, radio and television, which one do you use most to learn about new music?

- Internet: 61%
- Radio: 28%
- Television: 4%
- Don't Know: 7%
Moms say the internet is excellent for entertainment

% of moms from Infinite Dial online survey rating the internet “9” or “10” on a 10 pt. scale as a...

- Source of entertainment: 60%
- Means of communication: 52%
- Source of news and information: 50%
Listening to online audio remains strong for Moms

% OF MOMS WHO HAVE ListENED TO ONLINE AUDIO
ONLINE AUDIO INCLUDES AM/FM RADIO STATIONS ON THE INTERNET AND INTERNET-ONLY AUDIO SOURCES

2016  2017  2018  2019

Ever  74  80  84  87

In the last month  61  71  76  74

In the last week  53  59  69  70

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Pandora still leads with Moms, but dips this year

% of Moms who currently ever use each internet-only audio source

- **Pandora**: 53% (2017), 56% (2018), 52% (2019)
- **Spotify**: 15% (2017), 23% (2018), 31% (2019)
- **iHeart Radio**: 22% (2017), 25% (2018), 26% (2019)
- **Apple Music**: 13% (2017), 16% (2018), 21% (2019)
- **Amazon Music**: 12% (2017), 20% (2018), 21% (2019)
- **Google Play All Access**: 11% (2017), 10% (2018), 14% (2019)

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THE INFINITE DIAL © 2019 EDISON RESEARCH AND TRITON DIGITAL
59% of moms of teens have learned about a streaming music service from their teenager.
52% of Moms have listened to internet radio by connecting a cell phone to their car stereo

BASE: MOMS WHO OWN A CELL PHONE
INFINITE DIAL PHONE SURVEY
Moms continue their social behavior

% of moms who use any social networking site or service

- 2013: 73%
- 2014: 78%
- 2015: 86%
- 2016: 88%
- 2017: 93%
- 2018: 89%
- 2019: 92%

#MomsAndMedia
Facebook usage among all Americans is declining

TOTAL U.S. POPULATION 12+

% USING FACEBOOK

<table>
<thead>
<tr>
<th>Year</th>
<th>Facebook Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>67%</td>
</tr>
<tr>
<td>2018</td>
<td>62%</td>
</tr>
<tr>
<td>2019</td>
<td>61%</td>
</tr>
</tbody>
</table>
Facebook remains strong with Moms

% of moms who currently ever use Facebook

- 2017: 84%
- 2018: 79%
- 2019: 81%

#MomsAndMedia
Facebook declines further as ‘used most’ among social media Moms

% of moms who use social media and use Facebook most

<table>
<thead>
<tr>
<th>Year</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>72</td>
</tr>
<tr>
<td>2018</td>
<td>69</td>
</tr>
<tr>
<td>2019</td>
<td>64</td>
</tr>
</tbody>
</table>
Sites that are in Moms’ social network

% of moms who currently ever use each social networking site or service

- **Facebook**: 84% (2017), 79% (2018), 81% (2019)
- **Pinterest**: 47% (2017), 54% (2018), 63% (2019)
- **Instagram**: 37% (2017), 44% (2018), 53% (2019)
- **Snapchat**: 29% (2017), 34% (2018), 33% (2019)
- **Twitter**: 21% (2017), 25% (2018), 23% (2019)

#MomsAndMedia

THE INFINITE DIAL 2019

THE INFINITE DIAL © 2019 EDISON RESEARCH AND TRITON DIGITAL
In 2019, 63% of Moms use Pinterest.

INFINITE DIAL PHONE SURVEY
Other Media Consumption and Habits
Half of Moms wake in the morning with an alarm

% OF MOMS FROM ONLINE INFINITE DIAL SURVEY
HOW DID YOU WAKE UP THIS MORNING?

- An alarm: 51%
- You woke on your own: 32%
- Someone else woke you: 12%
- A pet woke you: 4%
- Other: 1%
63% of moms who set an alarm used a mobile device
Weekly podcast listening rises slightly among Moms

% of Moms who have listened to a podcast

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ever</strong></td>
<td>37</td>
<td>46</td>
<td>53</td>
<td>56</td>
</tr>
<tr>
<td><strong>In the last month</strong></td>
<td>21</td>
<td>29</td>
<td>33</td>
<td>33</td>
</tr>
<tr>
<td><strong>In the last week</strong></td>
<td>14</td>
<td>19</td>
<td>19</td>
<td>21</td>
</tr>
</tbody>
</table>

#MomsAndMedia
YouTube for music remains huge with Moms

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

- **Ever**
  - 2016: 67%
  - 2017: 73%
  - 2018: 79%
  - 2019: 77%

- **In the last month**
  - 2016: 55%
  - 2017: 63%
  - 2018: 67%
  - 2019: 68%

- **In the last week**
  - 2016: 42%
  - 2017: 43%
  - 2018: 58%
  - 2019: 58%
AM/FM Radio remains unchanged for Moms

% OF MOMS WHO HAVE LISTENED TO AM/FM RADIO EITHER OVER THE AIR OR ONLINE IN THE LAST WEEK

- 2017: 65%
- 2018: 78%
- 2019: 78%
Moms invest in video streaming

% of moms who currently have a subscription to each
% of moms who have watched each in the last week

- Netflix: 67% subscription, 71% watched in the last week
- Amazon Prime Video: 56% subscription, 31% watched in the last week
- Hulu: 30% subscription, 29% watched in the last week
76% of moms of teens agree that their teenagers assist them with new technology

CRS AND EDISON RESEARCH SURVEY JANUARY 2019
Conclusions
Moms and Media 2019 Takeaways

1. Moms remain mobile and keep adding devices to their technology arsenal to support that
   - Smartphones and tablets are very much in play
   - Wearable tech is rising
   - Smart speakers rapidly gain traction

2. Social media is still big but we see a shift in the preference for Facebook
   - Facebook is still used but is slipping as the go-to
   - Instagram and Pinterest continue to climb in usage

3. Internet is the engine that drives Moms’ day; it takes the most of her daily media time
   - Moms give less time daily to TV and radio
   - Nearly all Moms are getting online via mobile
   - Media consumption through internet sources like YouTube and Netflix are weekly staples