Moms and Media 2020

- Taken from the Infinite Dial series which dates to 1998 and is the longest-running survey of digital media behavior in America
- Data for mobile behavior, smart speakers, social media, online audio and more before COVID-19
- A new, supplement survey completed in April 2020
- Insights on media habits and consumption among Moms during COVID-19
Study Methodology

• In early 2020, Edison Research conducted a national telephone survey of 1,502 people aged 12 and older, using random digit dialing techniques to both cell phones and landlines (U.S. Population 12+)

• Data weighted to national 12+ U.S. population figures

• In addition, Edison Research also conducted a national online survey of 3159 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

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

• The sample yielded 220 Moms from the telephone survey and 467 Moms from the online survey

• Edison recently surveyed an additional 326 Moms in a national, online study to get perspective on media habits during the COVID-19 pandemic
The Moms sample: Age

- 18-24: 4% (4%)
- 25-34: 29% (29%)
- 35-44: 39% (39%)
- 45-54: 21% (21%)
- 55+: 7% (7%)

Average age of Moms: 40
The Moms sample: Employment status

- Full-time: 52%
- Part-time: 18%
- Homemaker: 18%
- Other*: 12%

(*temporarily unemployed, student, retired, other)
Devices
89% of Moms own a smartphone

INFINITE DIAL PHONE SURVEY
Moms show strong tablet ownership

% OF MOMS WHO OWN ANY KIND OF TABLET

- Yes: 69%
- No: 31%
One third of Moms own a smart speaker

% OF MOMS WHO OWN ANY KIND OF SMART SPEAKER

Yes
33%

No
67%
Smart Speaker Moms own an average of two speakers
Most Smart Speaker Moms own multiple

HOW MANY VOICE ENABLED SPEAKERS DO YOU HAVE IN YOUR HOUSEHOLD?

BASE: MOMS WHO OWN AT LEAST ONE SMART SPEAKER

- One smart speaker: 41%
- Two or more smart speakers: 59%
67% of Moms use some form of voice operated personal assistant.
58% of Moms own wireless earphones or headphones
32% of Moms own a Bluetooth-enabled fitness tracker
Moms are using their devices “more” during the COVID-19 pandemic

% OF MOMS USING EACH DEVICE MORE

- Television: 67%
- Smartphone: 63%
- Computer: 53%
- Tablet: 34%
- Smart Speaker: 21%
- AM/FM Radio: 16%
49% of Moms agree their children are using new technology and devices during the COVID-19 pandemic.
94% of Moms have internet access from any location

INFINITE DIAL PHONE SURVEY
82% of Moms access the internet from their cell phones

INFINITE DIAL PHONE SURVEY

#MomsAndMedia
Daily,
Moms spend...

1 hour 40 minutes listening to radio
2 hours 21 minutes watching television
3 hours 53 minutes using the internet

INFINITE DIAL PHONE SURVEY
SELF-REPORTED AVERAGE TIME SPENT WITH MEDIA IN THE LAST 24 HOURS
68% of Moms say they are spending more time daily using the internet during the COVID-19 pandemic.
Social Media
In 2020

87% of Moms use some kind of social media

INFINITE DIAL PHONE SURVEY

#MomsAndMedia
Moms remain social

% of moms who use any social networking site 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>
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<tr>
<td>2015</td>
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<td>2018</td>
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<tr>
<td>2019</td>
<td>92</td>
</tr>
<tr>
<td>2020</td>
<td>87</td>
</tr>
</tbody>
</table>
Social site usage is mainly stable for Moms

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

Facebook: 2017 - 79, 2018 - 81, 2019 - 81, 2020 - 84

#MomsAndMedia
Facebook bounces back for ‘used most’ among social media Moms

% of Moms who use social media and use Facebook most

- 2017: 72%
- 2018: 69%
- 2019: 64%
- 2020: 69%

#MomsAndMedia
56% of Moms agree they are grateful for social media during the COVID-19 pandemic
39% of Moms agree social media is their main source for staying up to date on the COVID-19 pandemic in their community.
Online Audio and Other Media Habits
Weekly online audio listening holds steady 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

- In the last month:
  - 2016: 61%
  - 2017: 71%
  - 2018: 76%
  - 2019: 74%
  - 2020: 76%

- In the last week:
  - 2016: 53%
  - 2017: 59%
  - 2018: 69%
  - 2019: 70%
  - 2020: 70%
Weekly,

Moms spend 14 hours and 49 minutes listening to online audio

INFINITE DIAL PHONE SURVEY

ONLINE AUDIO INCLUDES AM/FM RADIO STATIONS ON THE INTERNET AND INTERNET-ONLY AUDIO SOURCES

BASE: MOMS WHO LISTENED TO ONLINE AUDIO IN THE LAST WEEK AND GAVE AN OPINION

#MomsAndMedia
Podcast listening continues to gain among Moms

% OF MOMS WHO HAVE LISTENED TO A PODCAST

<table>
<thead>
<tr>
<th>Year</th>
<th>Ever</th>
<th>In the last month</th>
<th>In the last week</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>37</td>
<td>21</td>
<td>14</td>
</tr>
<tr>
<td>2017</td>
<td>46</td>
<td>29</td>
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<td>2019</td>
<td>56</td>
<td>33</td>
<td>21</td>
</tr>
<tr>
<td>2020</td>
<td>57</td>
<td>39</td>
<td>24</td>
</tr>
</tbody>
</table>
AM/FM Radio holds again for Moms

% of Moms who have listened to AM/FM radio either over the air or online in the last week

- 78% in 2018
- 78% in 2019
- 78% in 2020
48% of Moms have listened to an audiobook
Moms who listen to audiobooks average seven per year.

INFINITE DIAL PHONE SURVEY
25% of Moms agree it is hard to find time to listen to online audio like podcasts and music during the COVID-19 pandemic
The main reason Moms listen to audio during COVID-19 pandemic

Audio includes AM/FM radio, online audio sources and podcasts

Base: Moms who listen to AM/FM radio, online audio or podcasts

- Relaxation and enjoyment: 74%
- To stay informed about COVID-19: 26%
Moms get relaxation and entertainment from media during COVID-19 pandemic

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Percentage of Moms Using</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio</td>
<td>74</td>
</tr>
<tr>
<td>Social Media</td>
<td>68</td>
</tr>
<tr>
<td>Television</td>
<td>65</td>
</tr>
<tr>
<td>Internet</td>
<td>61</td>
</tr>
</tbody>
</table>
The New Normal
A new normal for Moms during COVID-19

- Sheltering in place has elevated the need for technology
- Children and their media needs come front and center
- Moms take advantage of ways to stay in touch
- Connecting with old media habits can be a challenge
- The need for relaxation and entertainment is driving media consumption
72% of Moms agree that technology has been essential during the COVID-19 pandemic.
54% of Moms agree they are spending a lot of time helping their children with distance learning during the COVID-19 pandemic.
47% of Moms agree they are concerned about the amount of screen time their children are getting during the COVID-19 pandemic.
58% of Moms agree their children’s daily media consumption has increased during the COVID-19 pandemic.
33% of Moms agree they are consuming more of their children’s media for entertainment than their own during the COVID-19 pandemic.
How Moms stay in touch with friends and family during the COVID-19 pandemic

% of moms who use each form of communication

- Texting: 81%
- Telephone calls (voice only): 66%
- Social Media: 62%
- Video calls (e.g. FaceTime): 58%
- Video Conferencing (e.g. Zoom): 38%
- Emailing: 34%
Used most often by Moms to stay in touch during the COVID-19 pandemic

% of Moms who use each form of communication:

- Telephone: 21%
- Video Calls: 20%
- Social Media: 15%
- Video Conferencing: 7%
- Email: 3%
- Texting: 34%
Overall, Moms’ media consumption during COVID-19 is more for...

- Relaxation and enjoyment: 61%
- To stay informed about COVID-19: 39%
38% of Moms agree their current COVID-19 media habits will become their new normal.
Conclusions
Moms and Media 2020 Recap

1. Moms are established in devices and technology but usage has changed due to COVID-19
   - Devices are critical in order to keep connected while sheltering in place
   - Technology is essential day to day
   - Internet dominates even more now

2. Media consumption is a mix of entertainment and necessary information
   - Moms seek media for a reprieve
   - Social media proves to be needed

3. New normal puts children’s media and technology first
   - Distance learning takes moms’ time
   - Moms give time to children’s media for entertainment
   - Children are getting consistent, daily exposure to media and technology
Moms and Media 2020
An Infinite Dial Report