

Moms and Media 2020

An Infinite Dial Report

presented by

The
Research Moms



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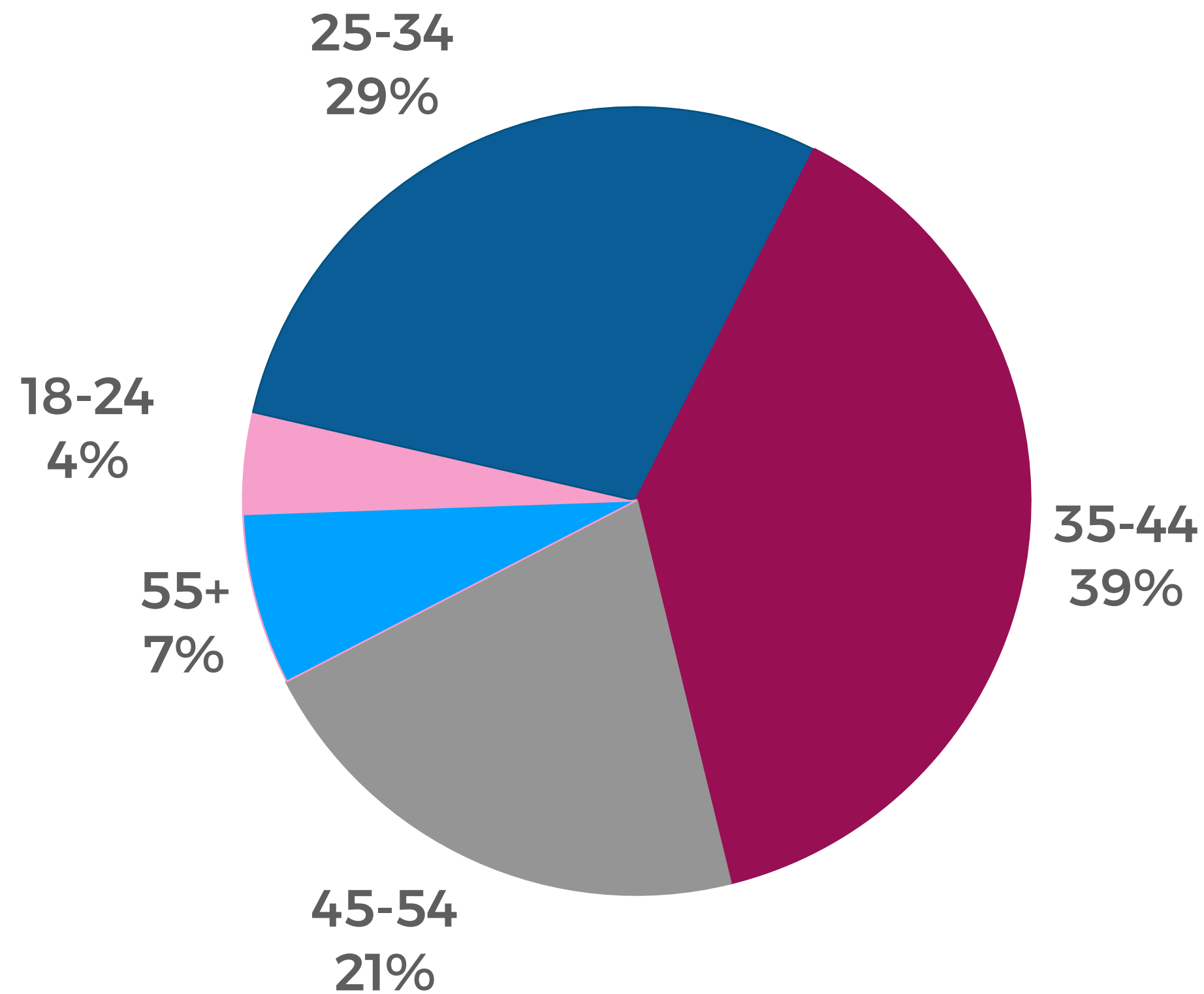
Moms and Media 2020

- 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

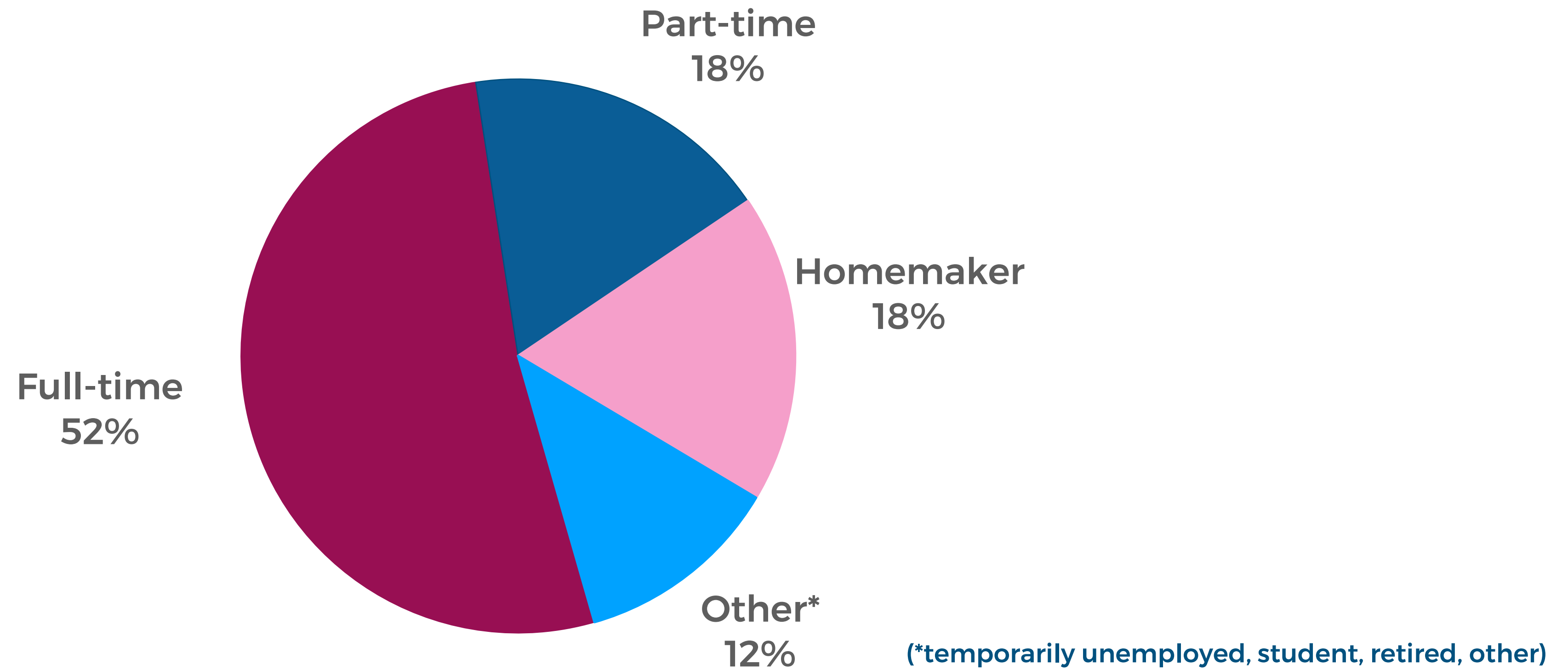
- In early 2020, Edison Research conducted a national telephone survey of 1,502 people aged 12 and older, using random digit dialing techniques to both cell phones and landlines (U.S. Population 12+)
- Data weighted to national 12+ U.S. population figures
- In addition, Edison Research also conducted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



AVERAGE AGE OF MOMS: 40

The Moms sample: Employment status





 THE INFINITE DIAL® 2020

Devices

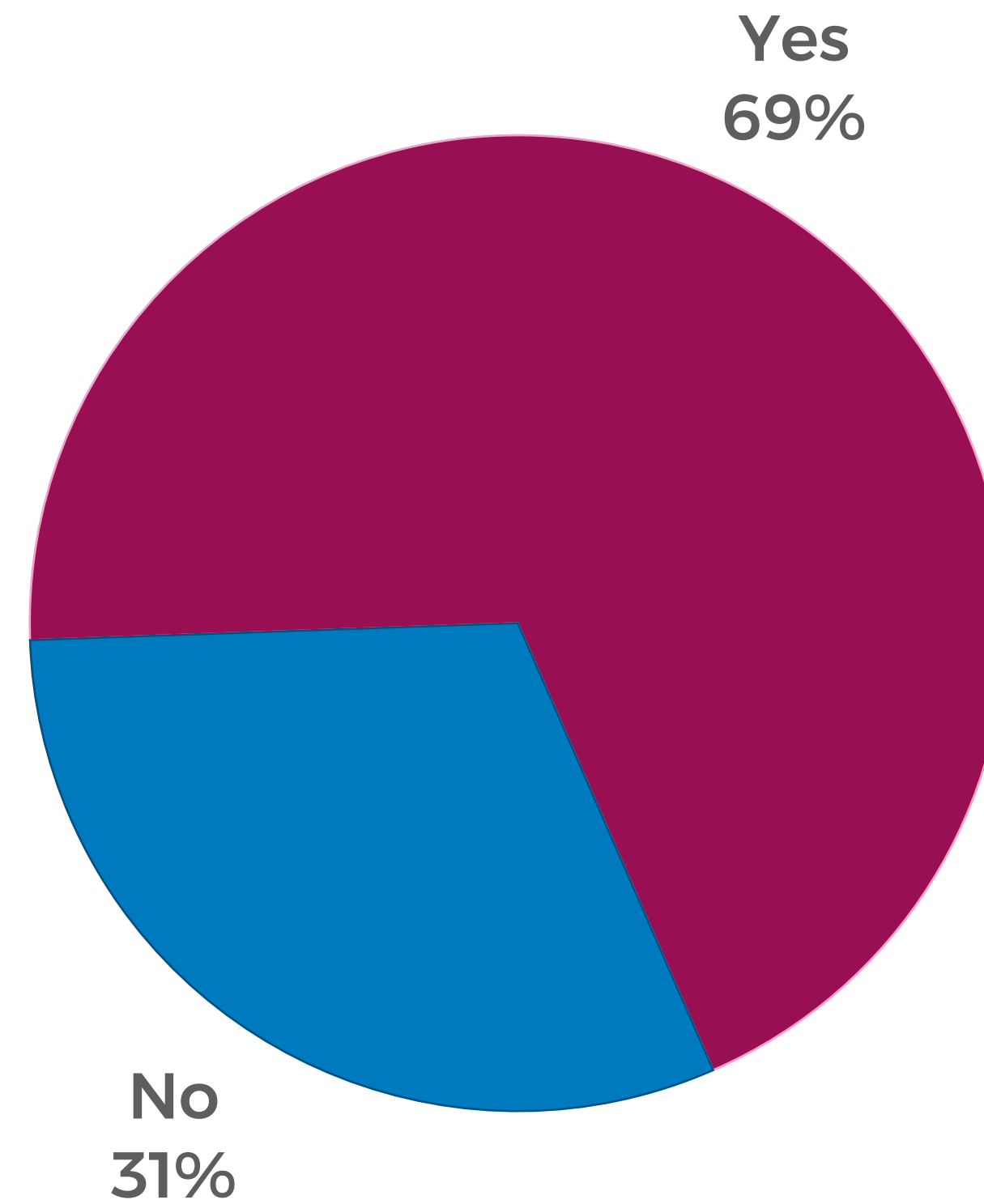


89% of Moms own a smartphone

INFINITE DIAL PHONE SURVEY

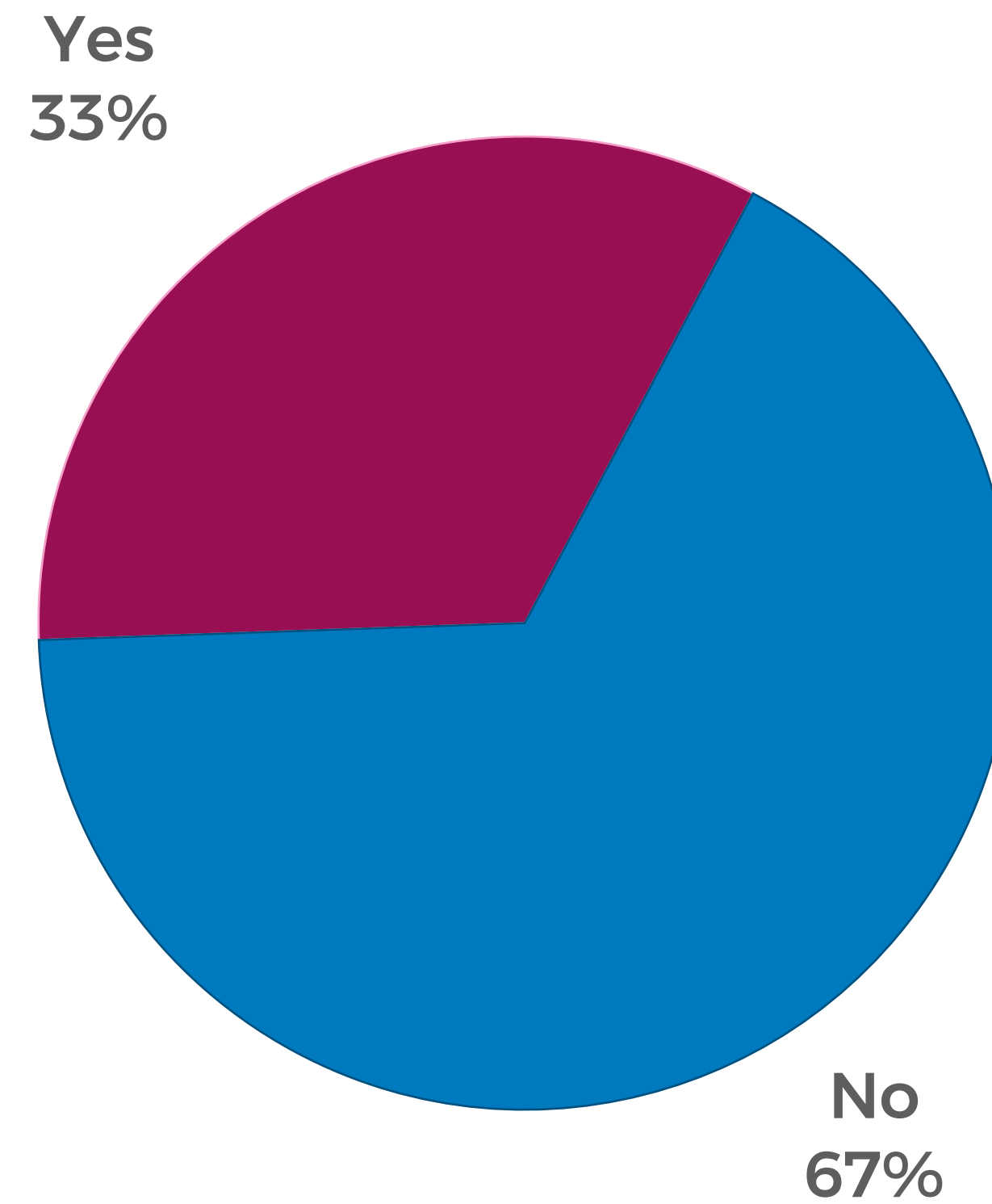
Moms show strong tablet ownership

% OF MOMS WHO OWN ANY KIND OF TABLET



One third of Moms own a smart speaker

% OF MOMS WHO OWN ANY KIND OF SMART SPEAKER



10:08

Smart Speaker Moms

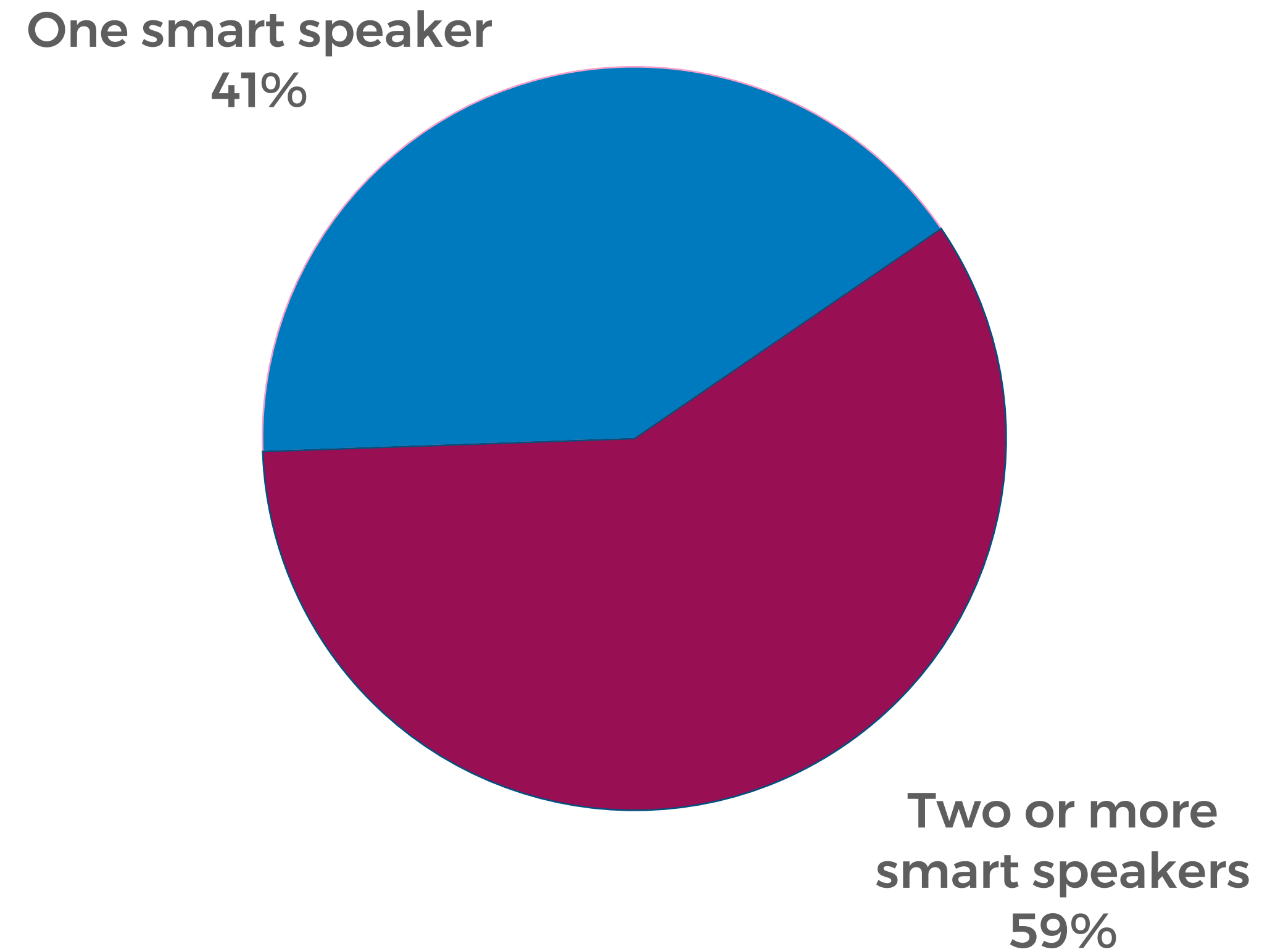
own an average of **two** speakers

INFINITE DIAL PHONE SURVEY

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



67% of Moms use some form of voice operated personal assistant

INFINITE DIAL PHONE SURVEY

58% of Moms own wireless earphones or headphones

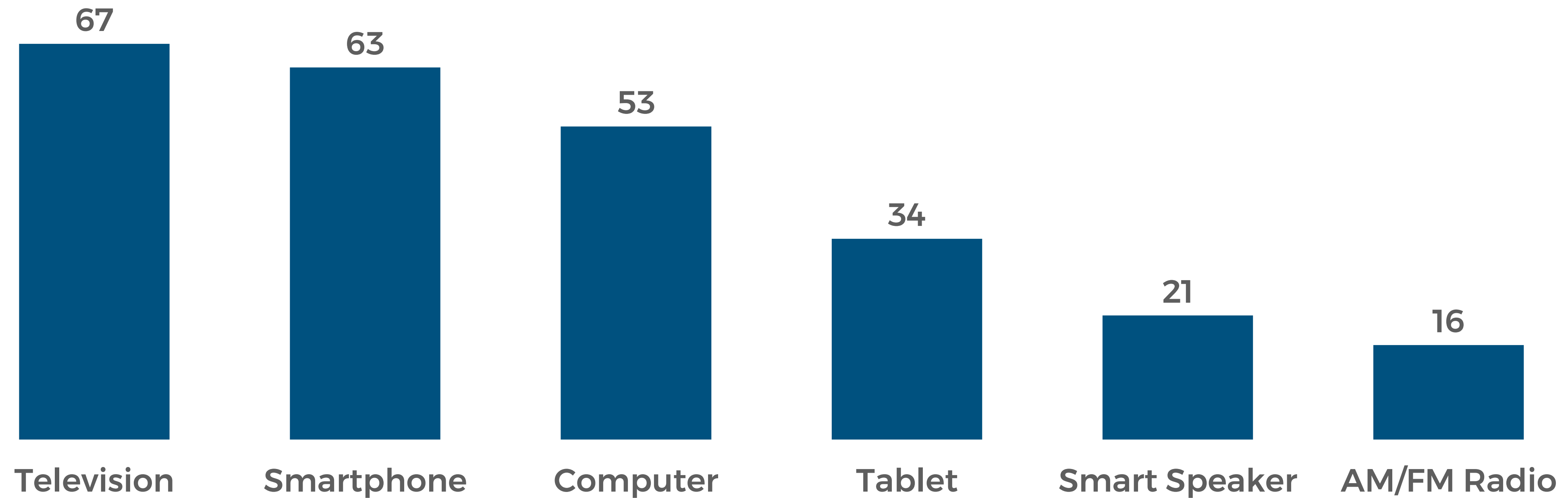
INFINITE DIAL ONLINE SURVEY

32% of Moms own a Bluetooth-enabled fitness tracker

INFINITE DIAL ONLINE SURVEY

Moms are using their devices “more” during the COVID-19 pandemic

% OF MOMS USING EACH DEVICE MORE



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49% of Moms agree

**their children are using new
technology and devices during the
COVID-19 pandemic**



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Internet



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94% of Moms have internet access from any location

INFINITE DIAL PHONE SURVEY

**82% of Moms
access the internet from their
cell phones**

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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



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Social Media



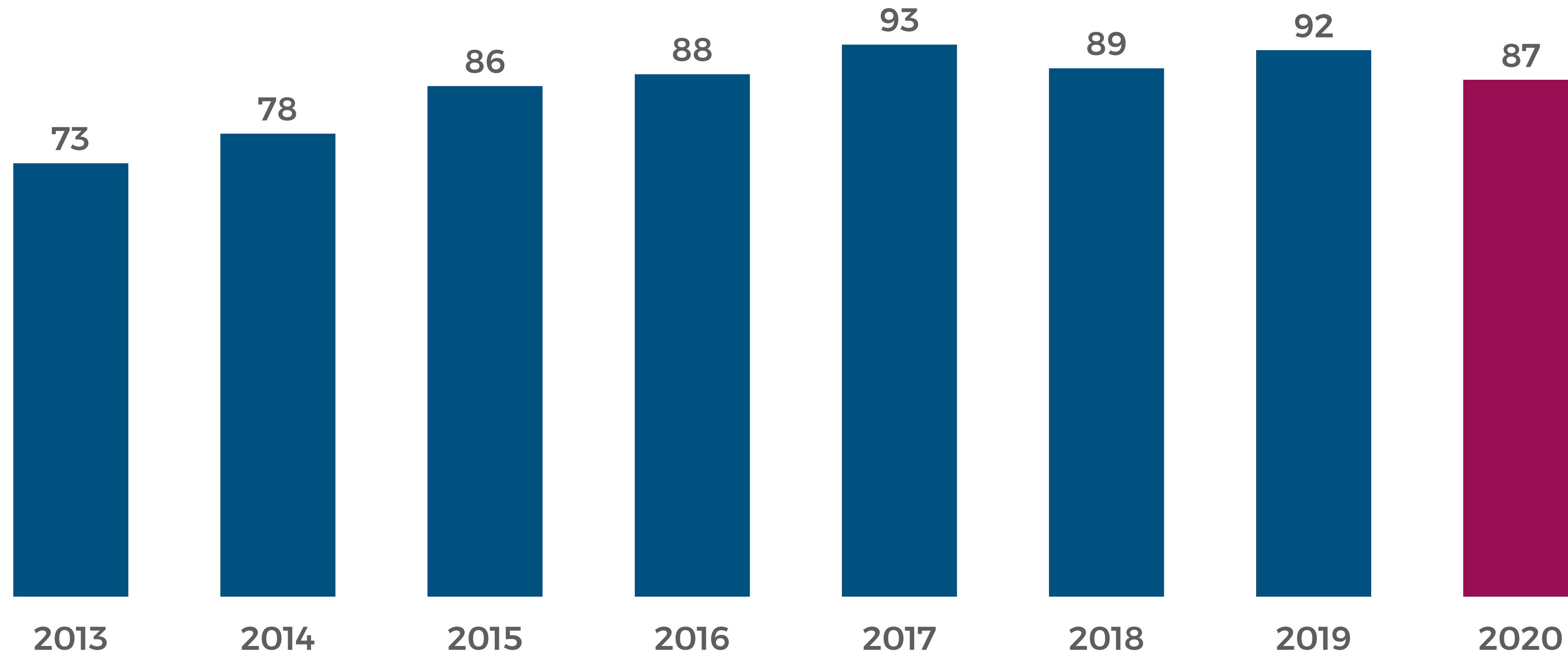
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In 2020
87% of Moms
use some kind of social media

INFINITE DIAL PHONE SURVEY

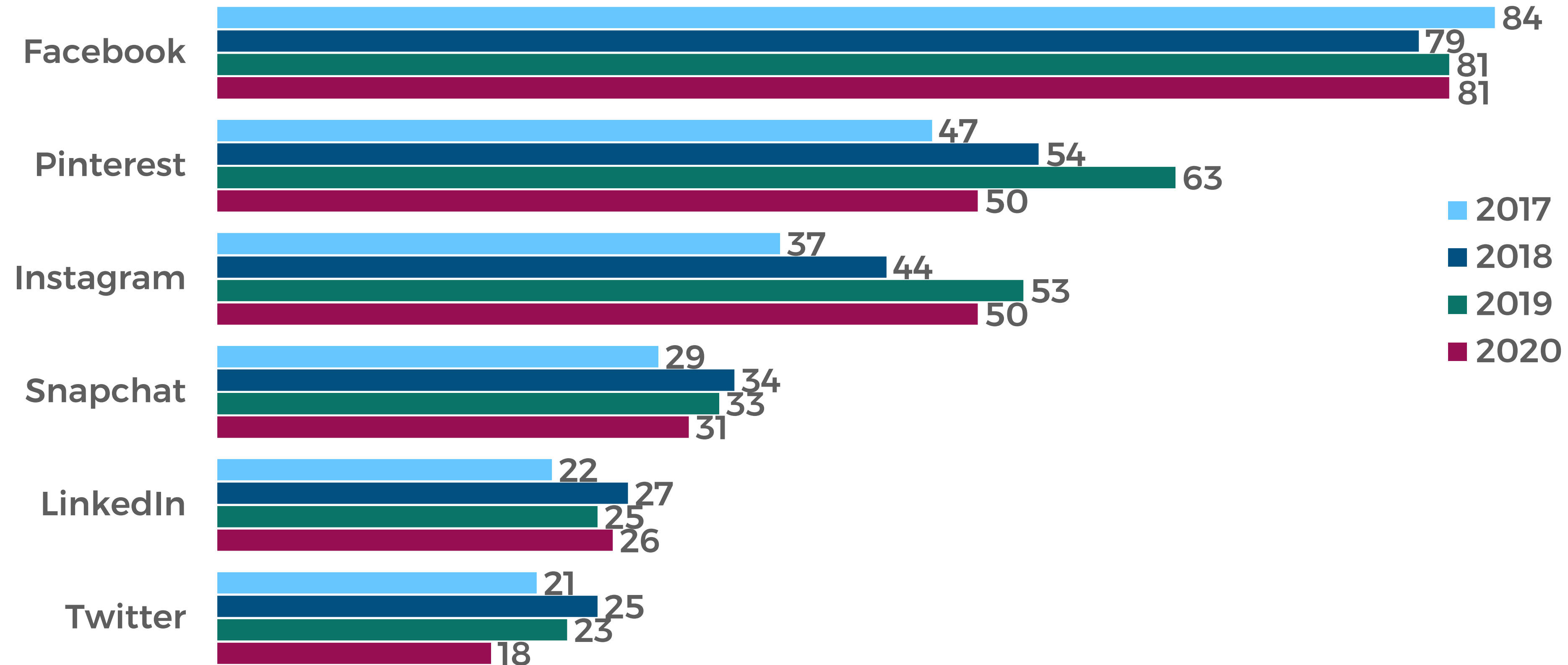
Moms remain social

% OF MOMS WHO USE ANY SOCIAL NETWORKING SITE OR SERVICE



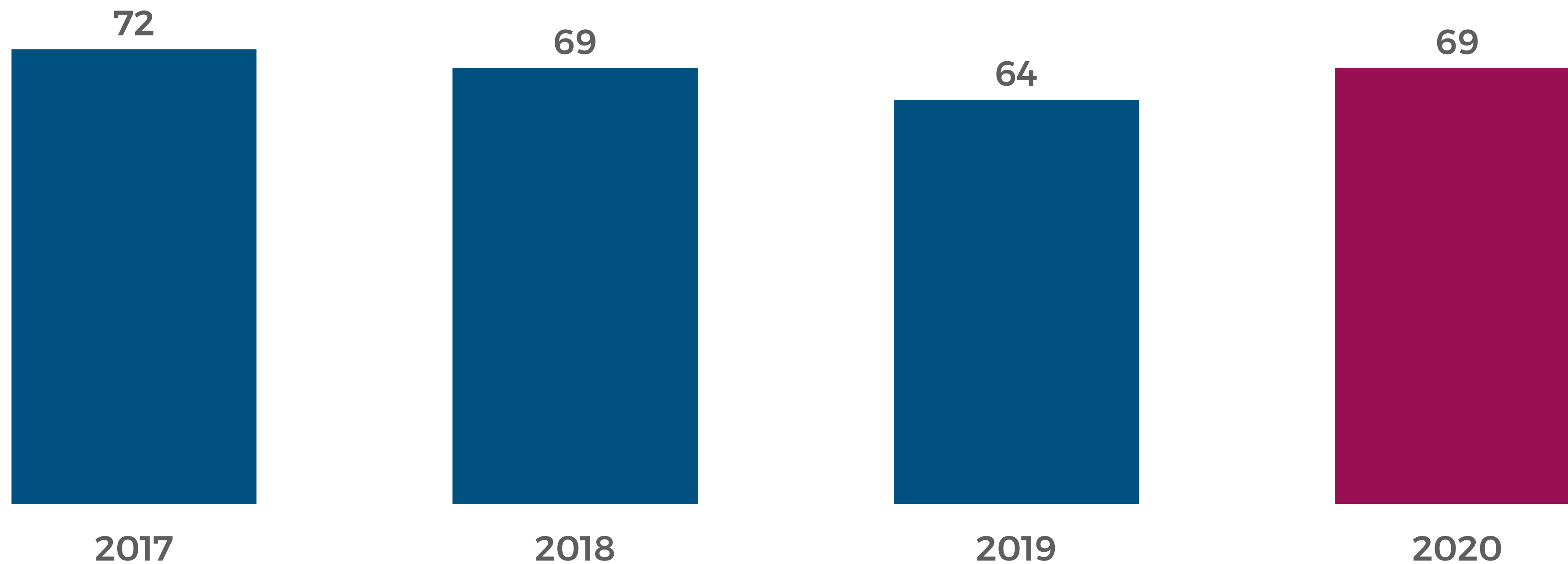
Social site usage is mainly stable for Moms

% OF MOMS WHO CURRENTLY EVER USE EACH SOCIAL NETWORKING SITE OR SERVICE



Facebook bounces back for 'used most' among social media Moms

% OF MOMS WHO USE SOCIAL MEDIA AND USE FACEBOOK MOST



56% of Moms agree

**they are grateful for social media
during the COVID-19 pandemic**



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39% of Moms agree

**social media is their main source
for staying up to date on the
COVID-19 pandemic in their community**



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Online Audio and Other Media Habits



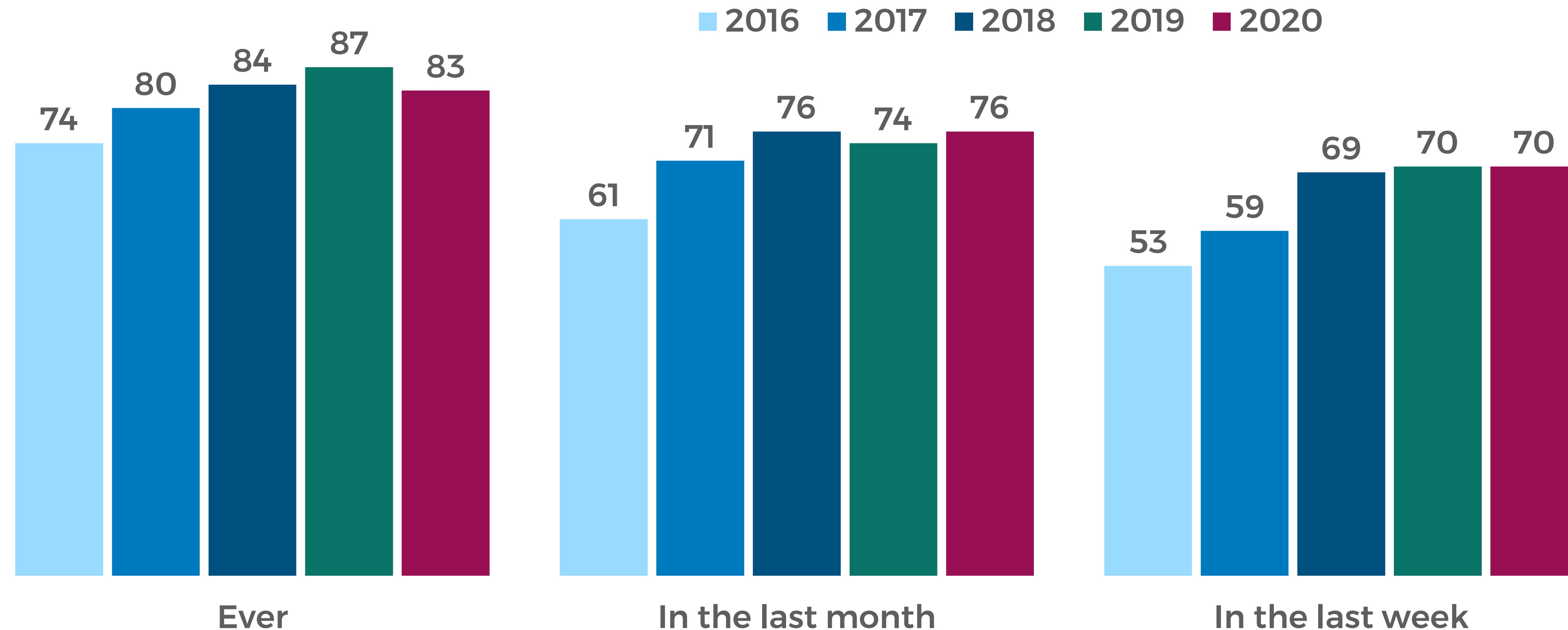
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Weekly online audio listening holds steady for Moms

% OF MOMS WHO HAVE LISTENED TO ONLINE AUDIO

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



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

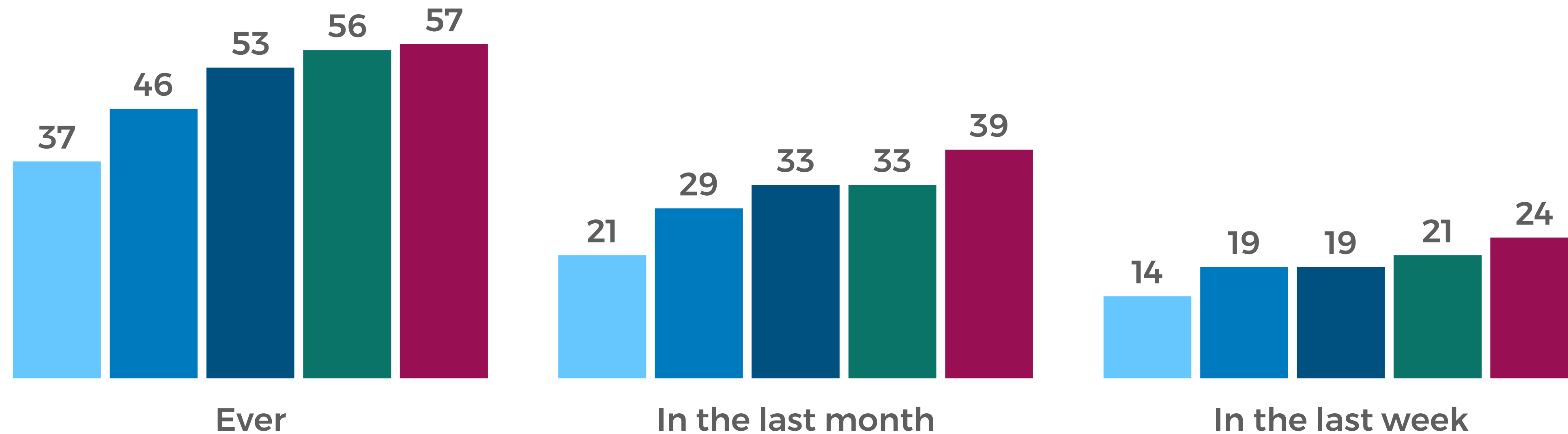


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Podcast listening continues to gain among Moms

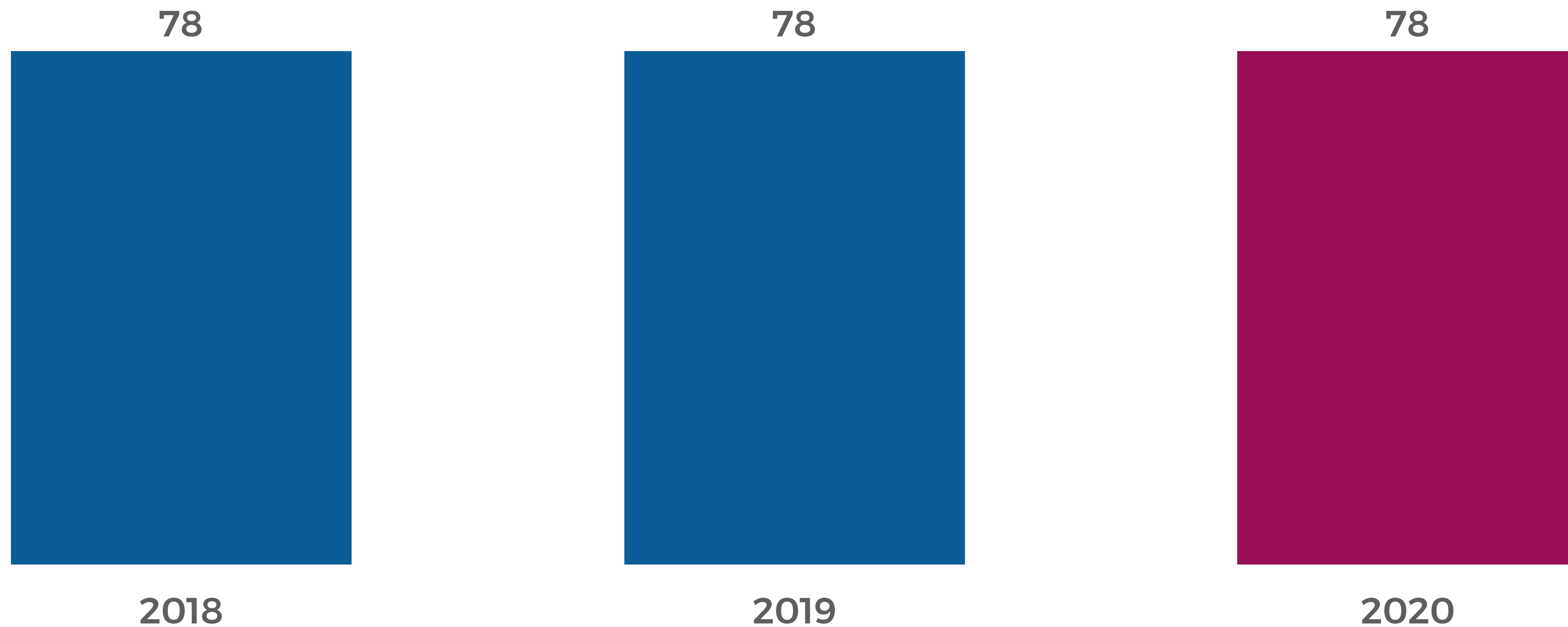
% OF MOMS WHO HAVE LISTENED TO A PODCAST

2016 2017 2018 2019 2020



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



48% of Moms have listened to an audiobook

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Moms who listen to audiobooks average **seven** per year

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25% of Moms agree

**it is hard to find time to listen to online audio
like podcasts and music during the
COVID-19 pandemic**

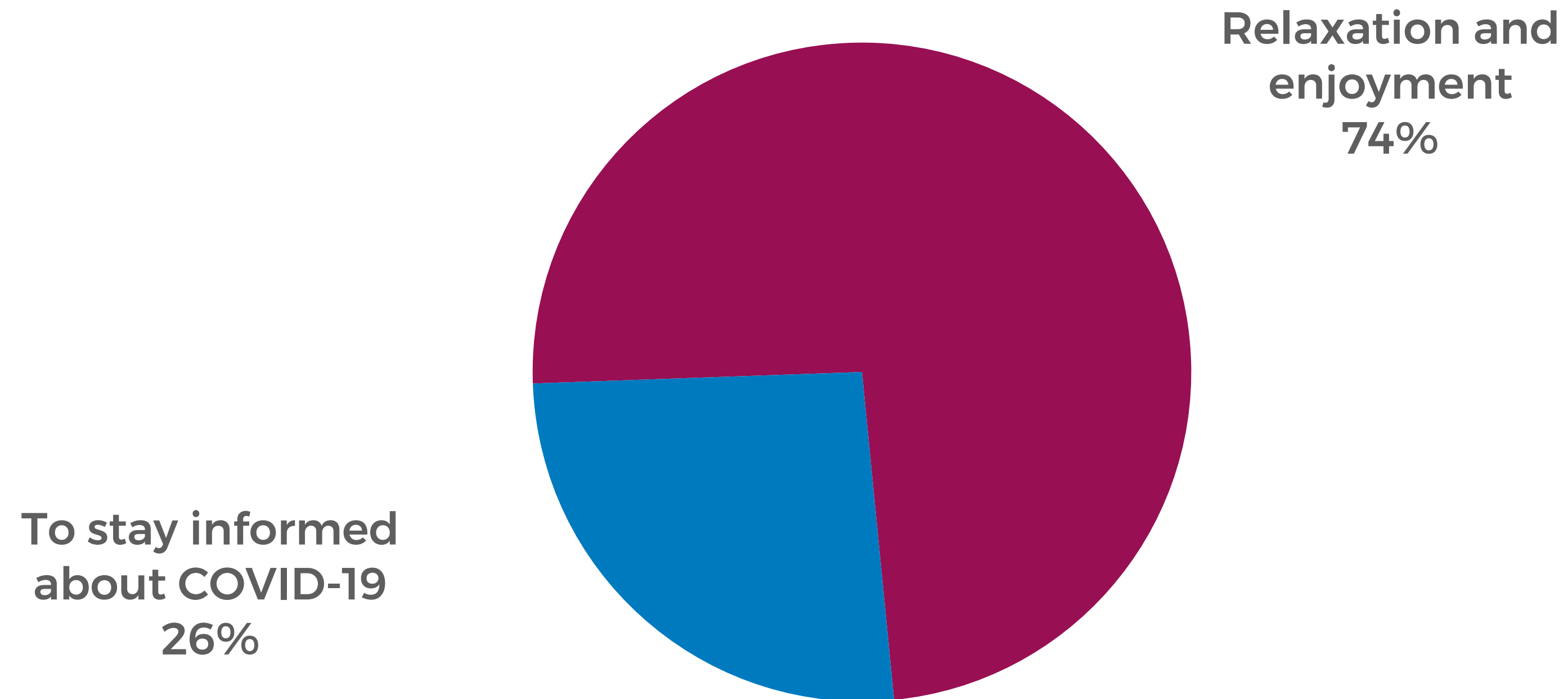


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The main reason Moms listen to audio during COVID-19 pandemic

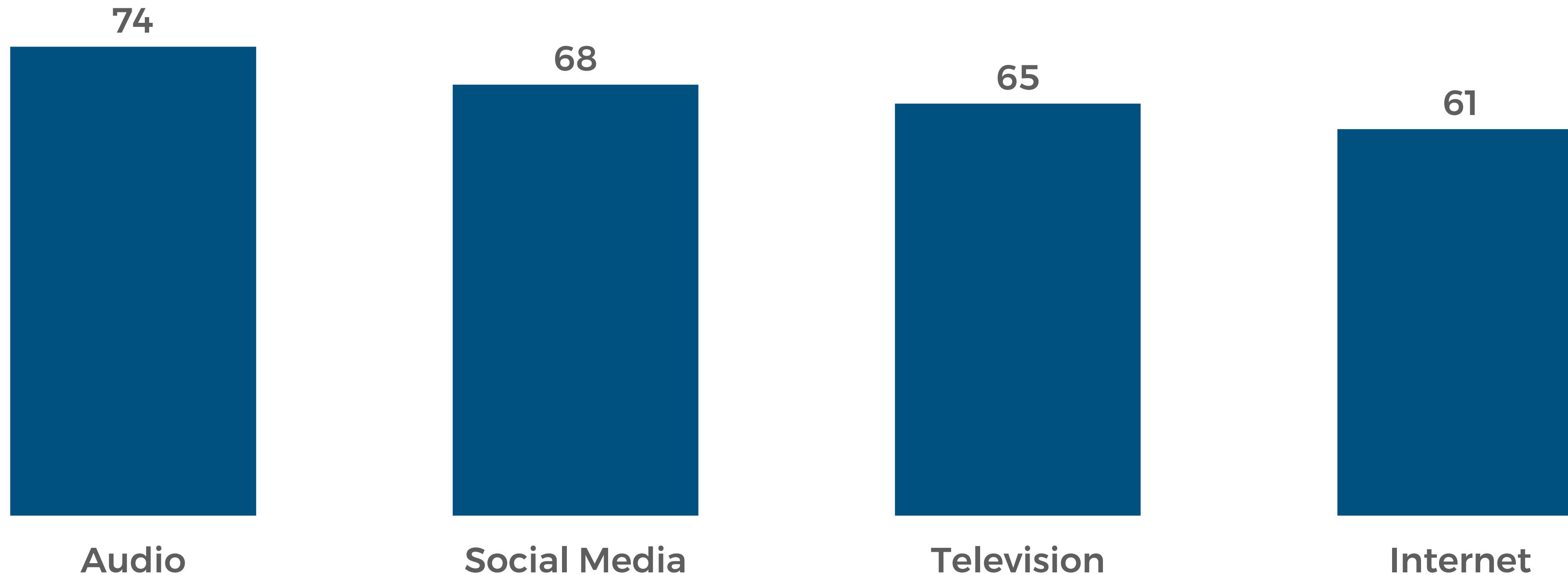
AUDIO INCLUDES AM/FM RADIO, ONLINE AUDIO SOURCES AND PODCASTS

BASE: MOMS WHO LISTEN TO AM/FM RADIO, ONLINE AUDIO OR PODCASTS



Moms get relaxation and entertainment from media during COVID-19 pandemic

% OF MOMS WHO USE EACH TYPE OF MEDIA FOR RELAXATION AND ENTERTAINMENT



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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**



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54% of Moms agree

**they are spending a lot of time helping
their children with distance learning
during the COVID-19 pandemic**



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47% of Moms agree

they are concerned about
**the amount of screen time their children
are getting during the COVID-19 pandemic**



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58% of Moms agree

**their children's daily media consumption
has increased during the
COVID-19 pandemic**



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33% of Moms agree

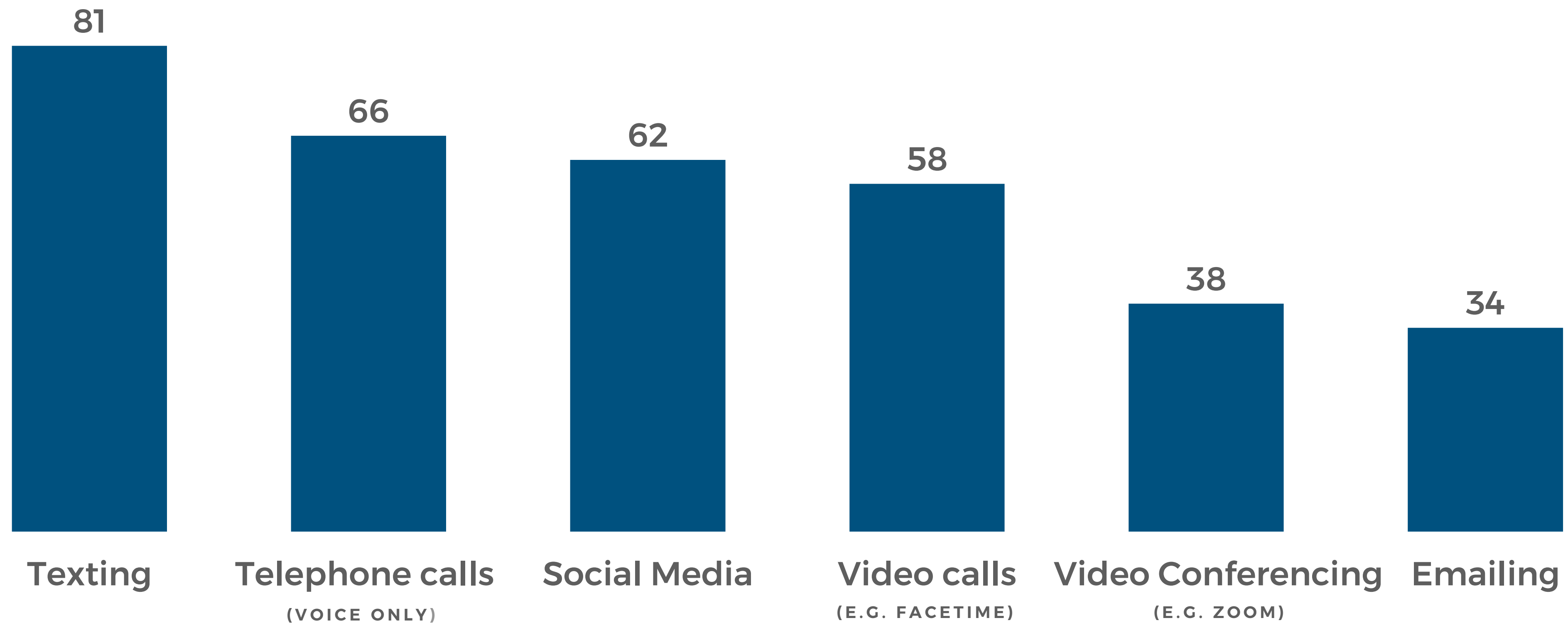
**they are consuming more of their children's
media for entertainment than their own
during the COVID-19 pandemic**



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How Moms stay in touch with friends and family during the COVID-19 pandemic

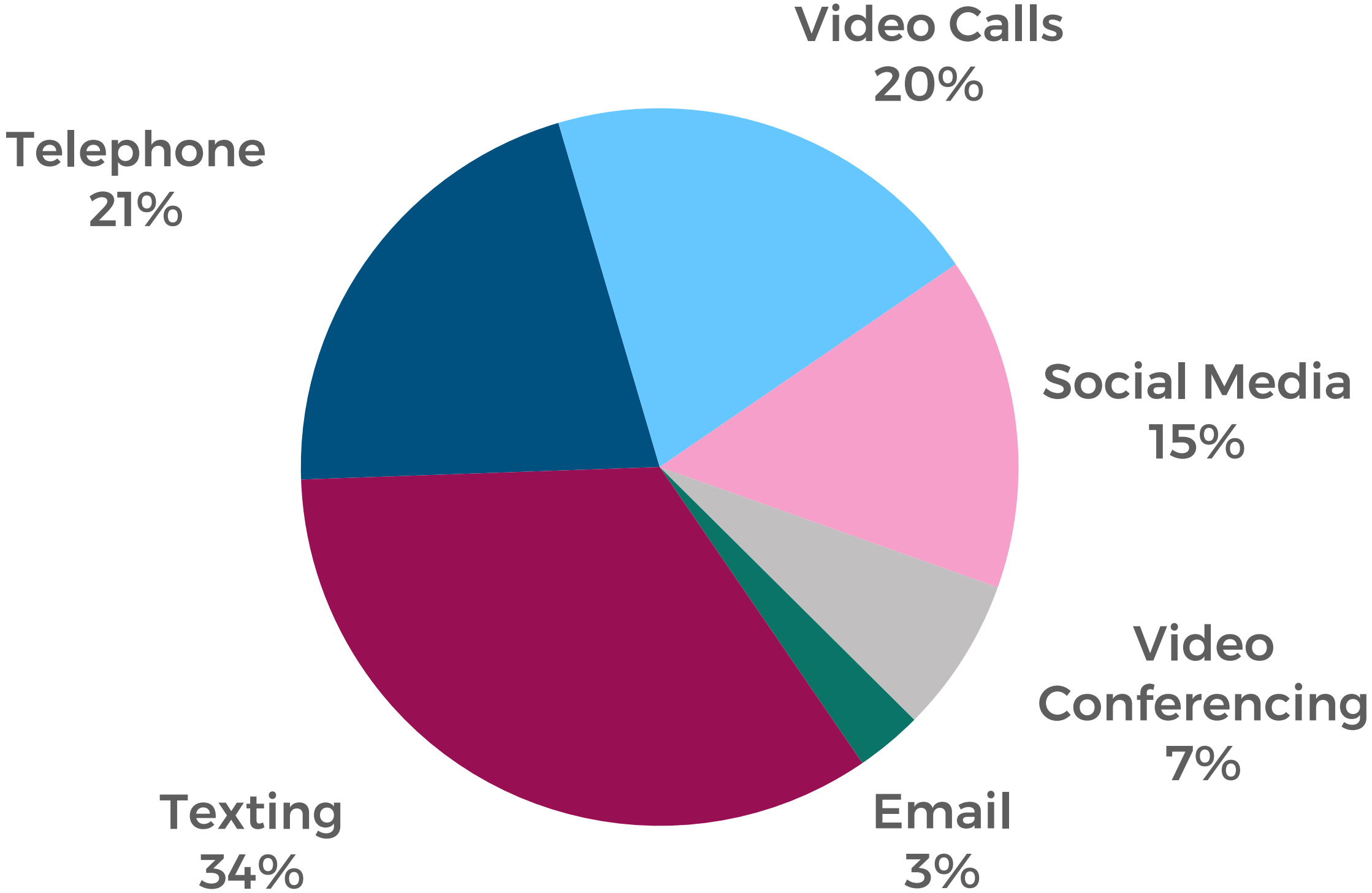
% OF MOMS WHO USE EACH FORM OF COMMUNICATION



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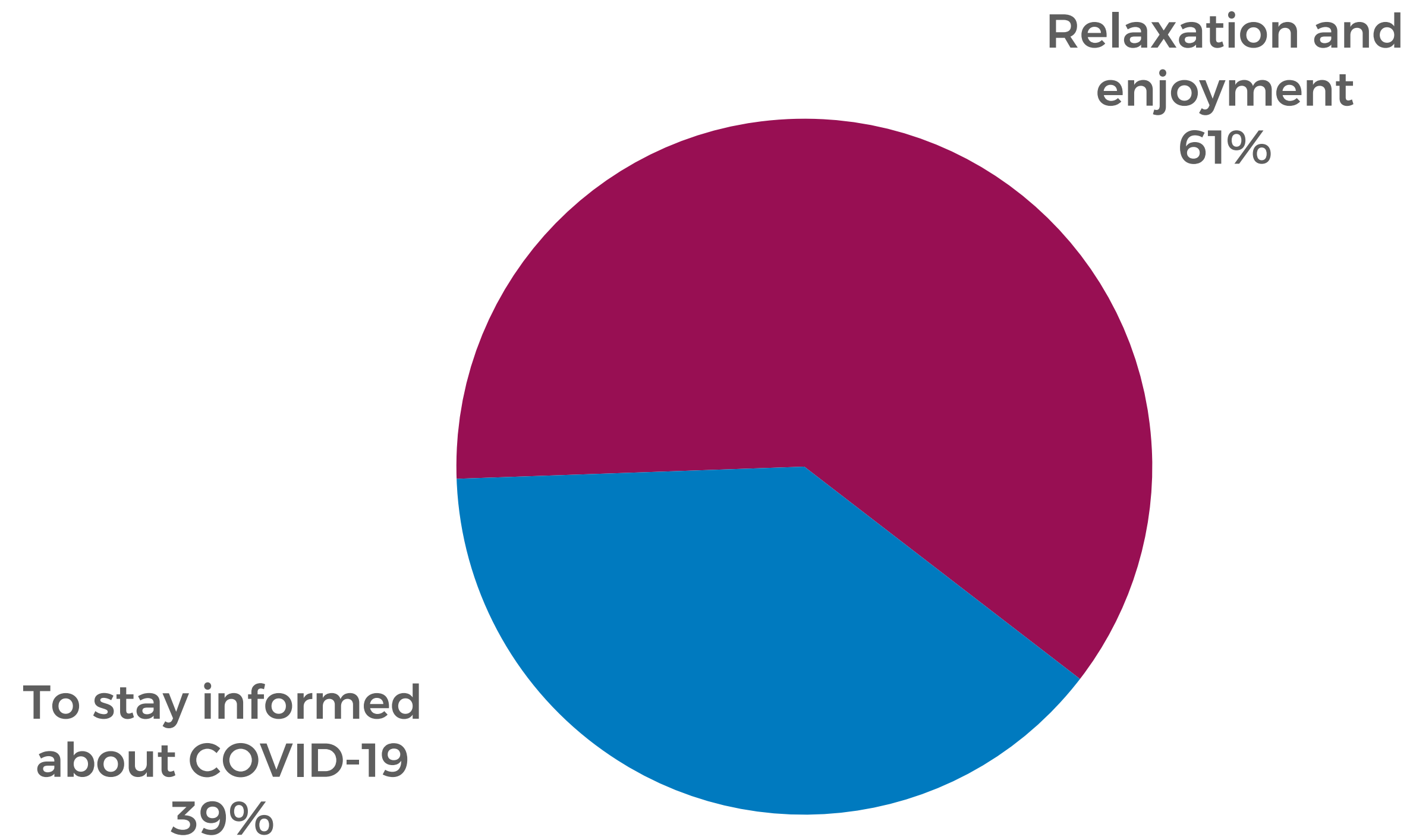
Used most often by Moms to stay in touch during the COVID-19 pandemic

% OF MOMS WHO USE EACH FORM OF COMMUNICATION



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Overall, Moms' media consumption during COVID-19 is more for..





38% of Moms agree
their current COVID-19 media habits
will become their new normal



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Conclusions



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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



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