

Moms and Media 2019

An Infinite Dial Report

presented by

The
ResearchMoms



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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

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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
 - Podcasts
 - YouTube
 - AM/FM radio



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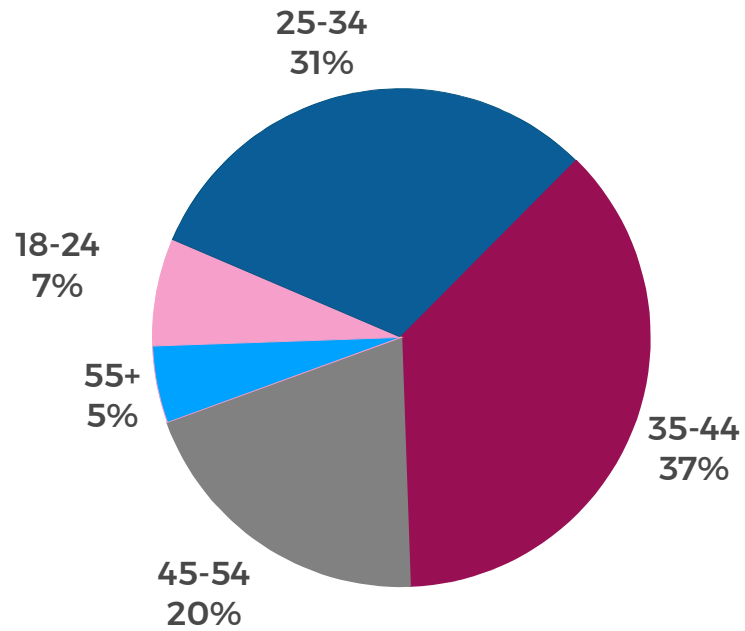
Study Methodology

- 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



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The Moms sample: Age

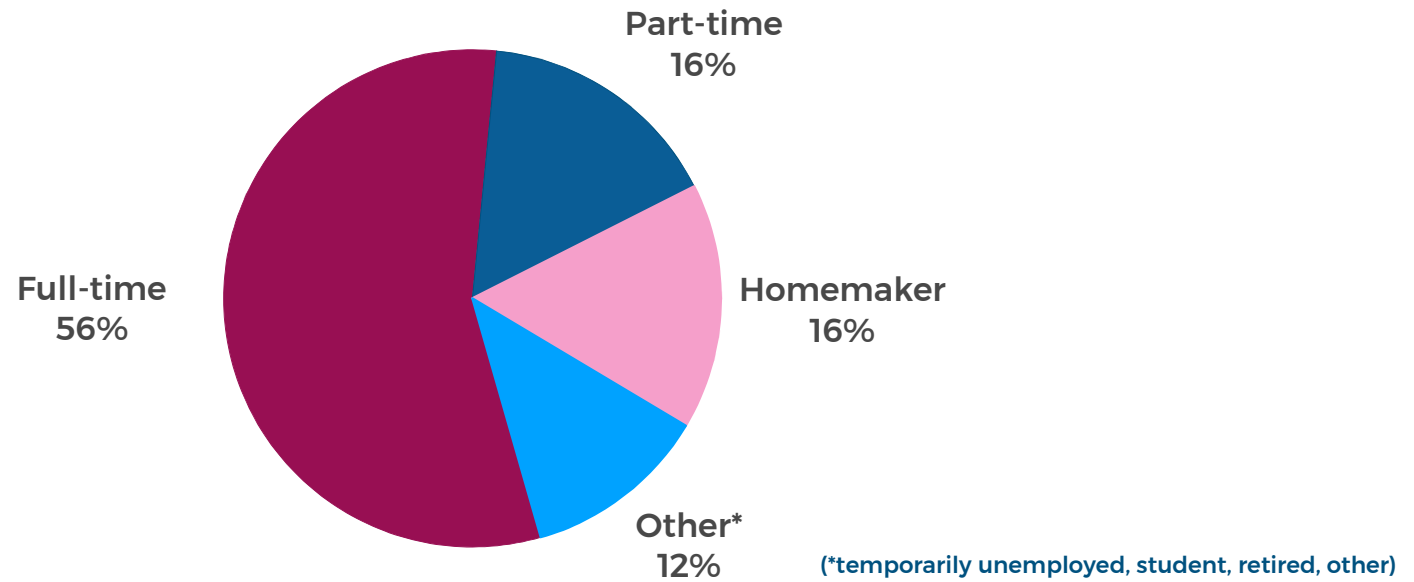


MEDIAN AGE OF MOMS: 37
AVERAGE AGE OF MOMS: 39



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The Moms sample: Employment status





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Devices

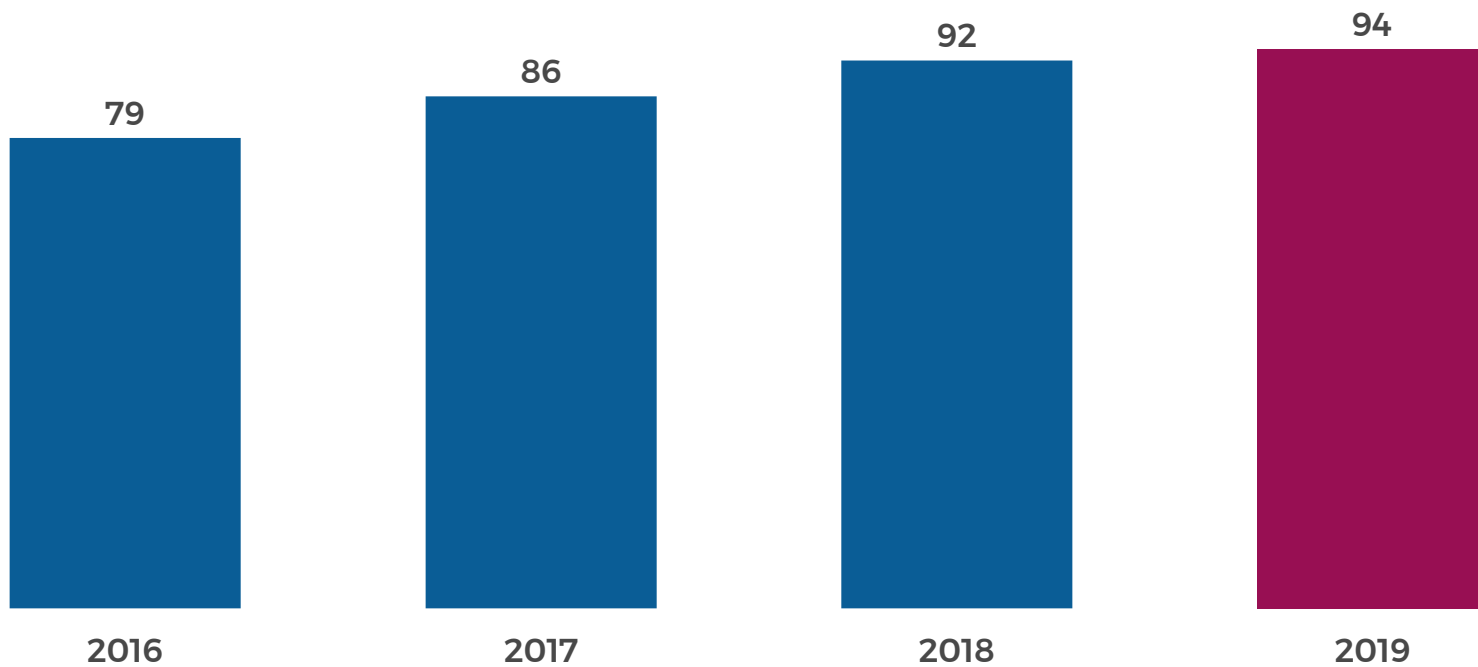


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Nearly all Moms now own a smartphone

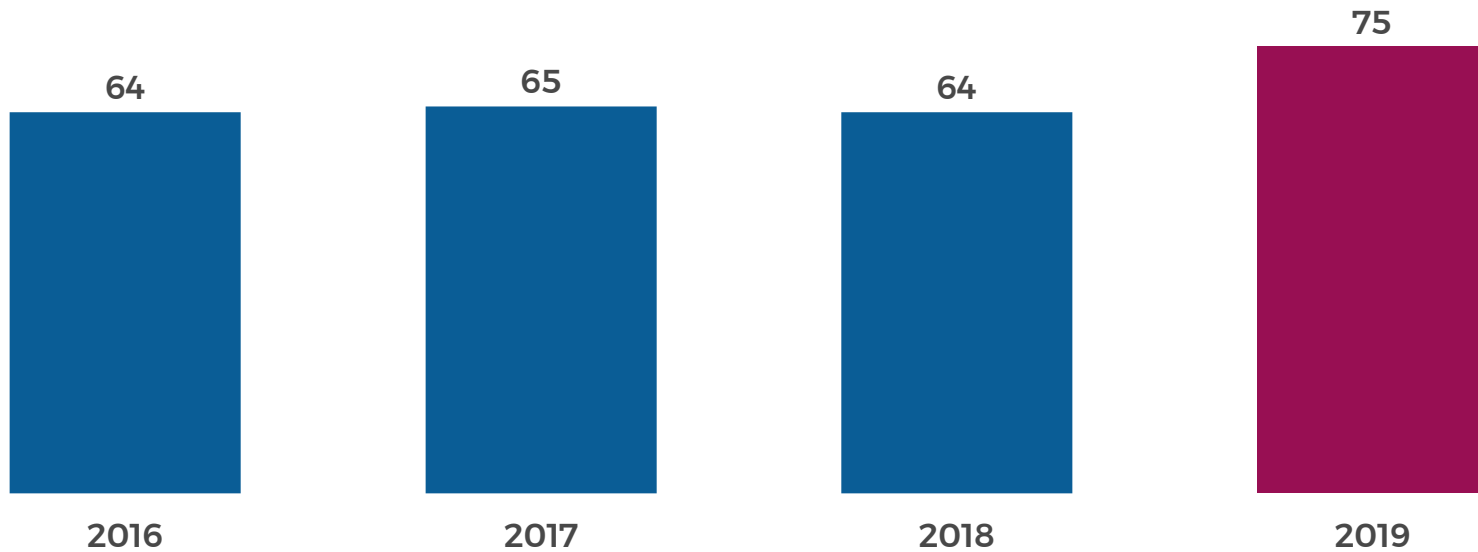
% OF MOMS WHO OWN A SMARTPHONE



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After a stall, tablets see a surge with Moms

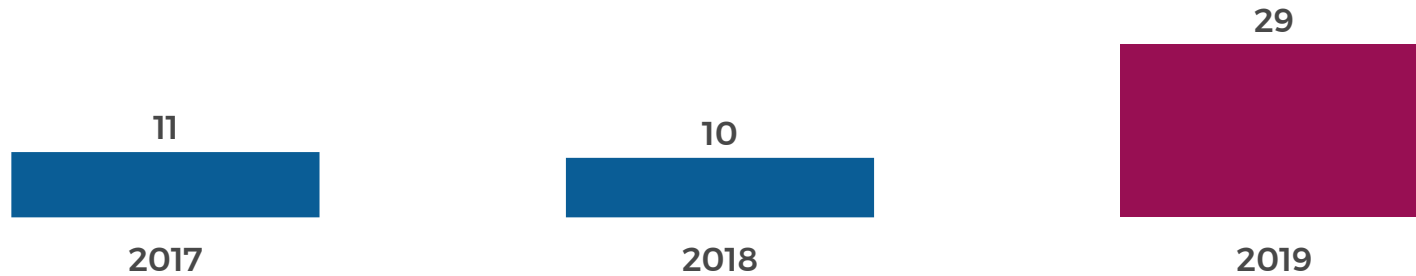
% OF MOMS WHO OWN A TABLET



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Wearable tech has caught on with Moms

% OF MOMS WHO OWN AN INTERNET CONNECTED WATCH SUCH AS THE APPLE WATCH OR SAMSUNG GEAR



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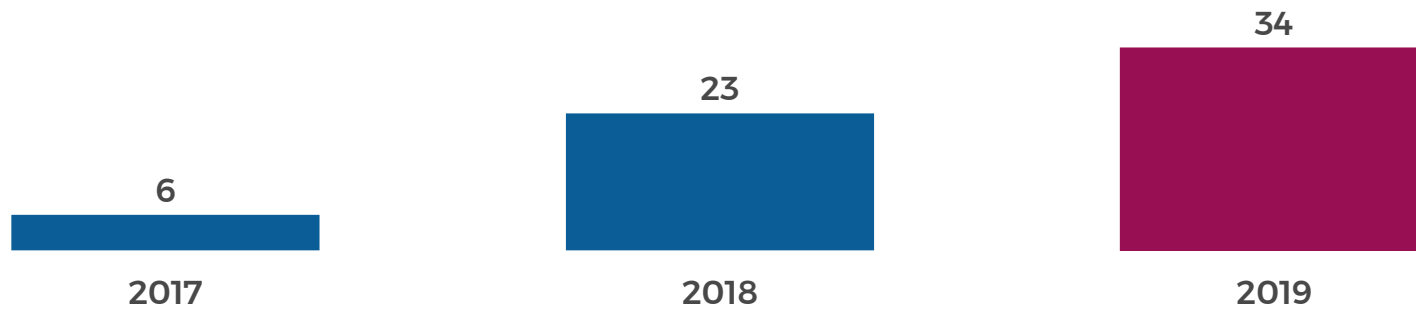
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**34% of Moms own
some type of smart speaker**

INFINITE DIAL PHONE SURVEY

One third of Moms own some kind of smart speaker

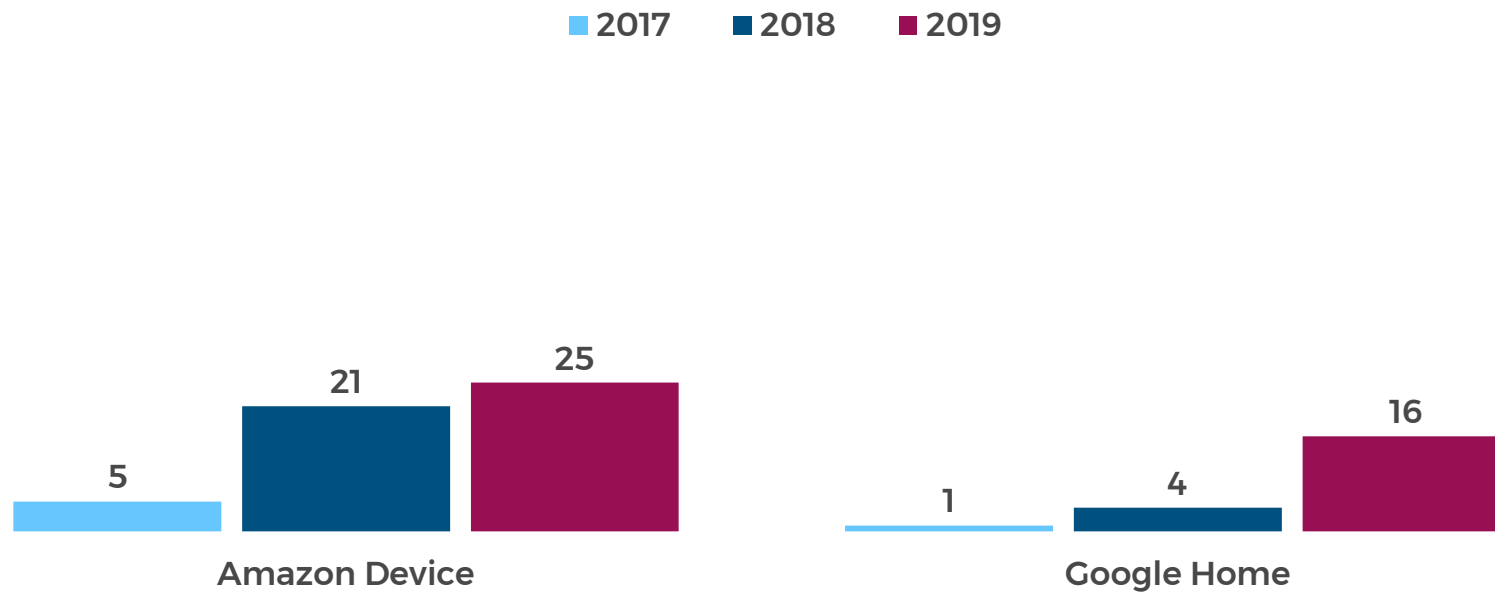
% OF MOMS OWNING ANY TYPE OF SMART SPEAKER



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Amazon and Google lead in smart speakers for Moms

% OF MOMS OWNING AMAZON DEVICE VS. GOOGLE HOME



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32% of Moms own a Bluetooth-enabled fitness tracker

INFINITE DIAL ONLINE SURVEY



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39% of Moms own wireless earphones or headphones

INFINITE DIAL ONLINE SURVEY

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Internet



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



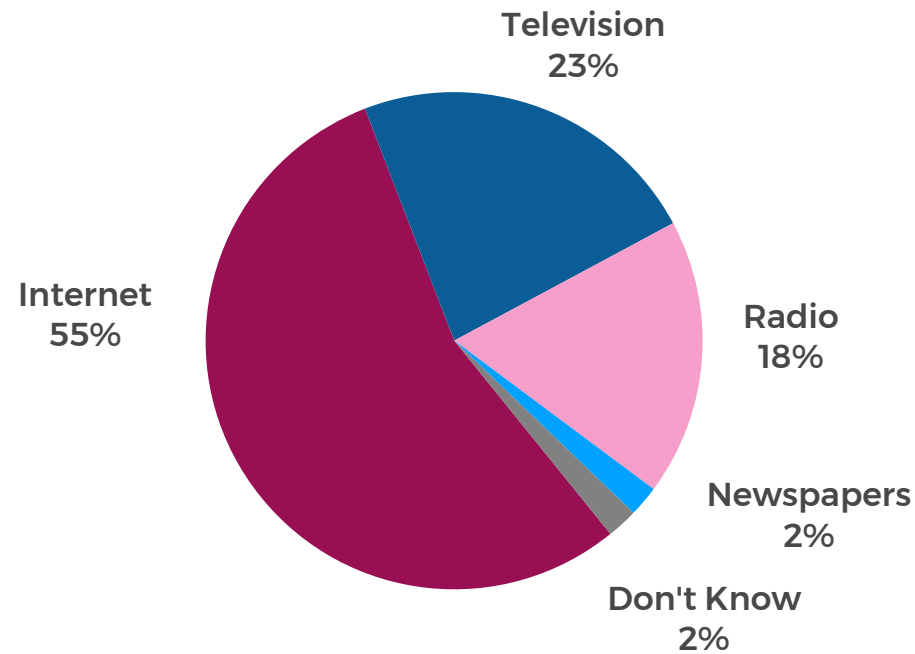
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Moms are spending
24 more minutes daily
with the internet in **2019** than in **2018**

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?



98% of Moms have internet access from any location

INFINITE DIAL PHONE SURVEY



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90% of Moms
access **the internet** from their
cell phones

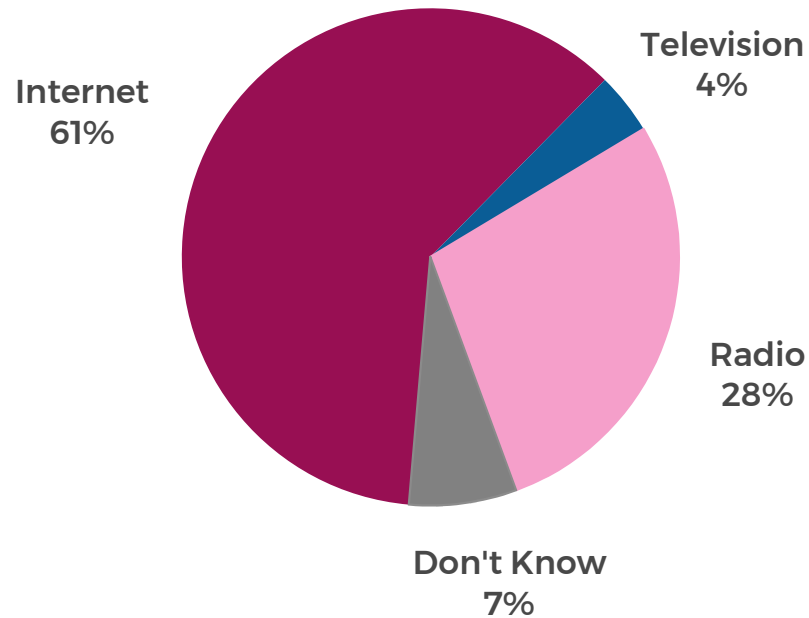
INFINITE DIAL PHONE SURVEY



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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?



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...



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Online Audio



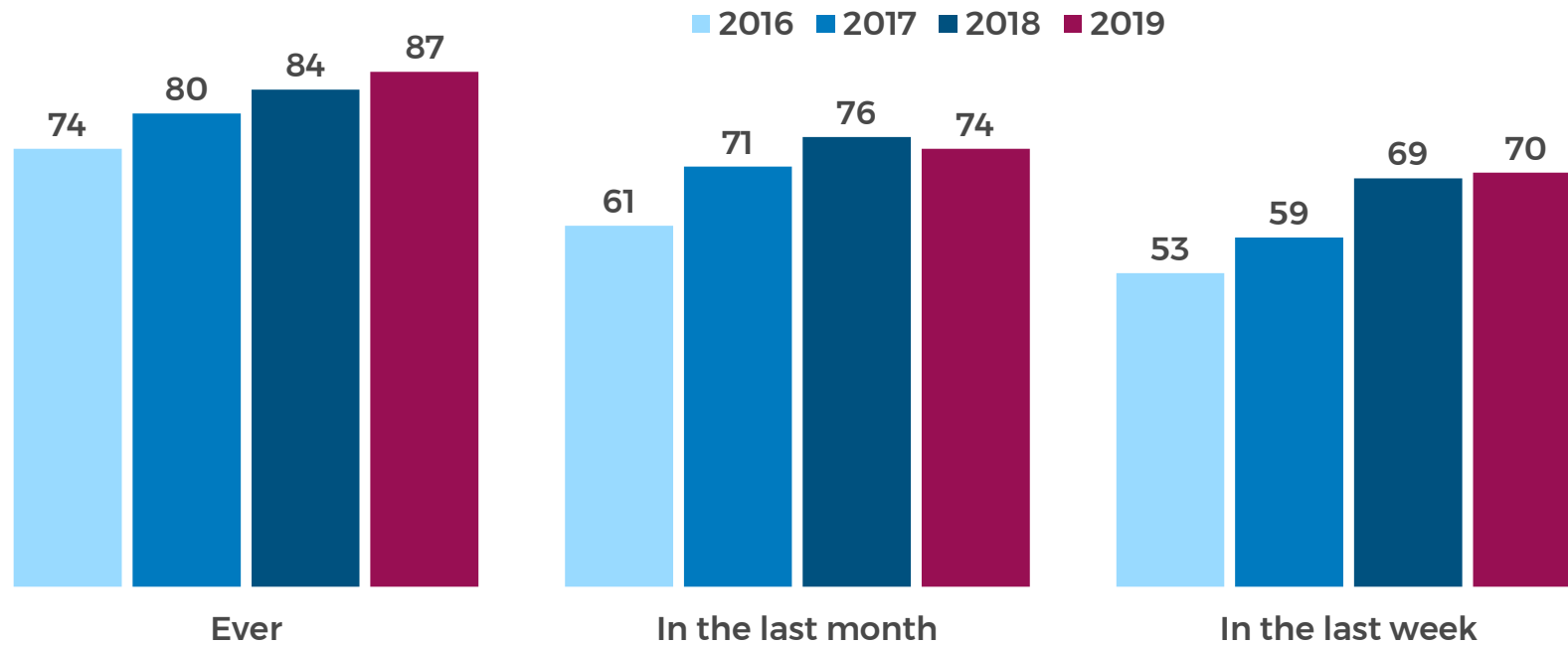
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Listening to online audio remains strong for Moms

% OF MOMS WHO HAVE LISTENED TO ONLINE AUDIO

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

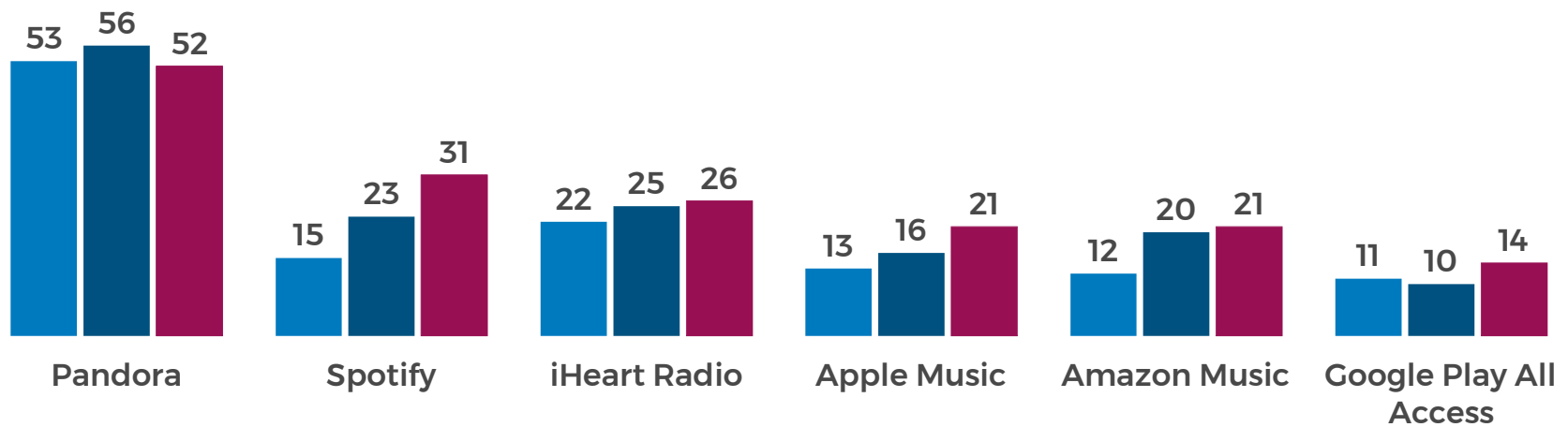


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Pandora still leads with Moms, but dips this year

% OF MOMS WHO CURRENTLY EVER USE EACH INTERNET-ONLY AUDIO SOURCE

■ 2017 ■ 2018 ■ 2019



59% of moms of teens have learned about a streaming music service from their teenager


CRS AND EDISON RESEARCH SURVEY JANUARY 2019



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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

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Social Media

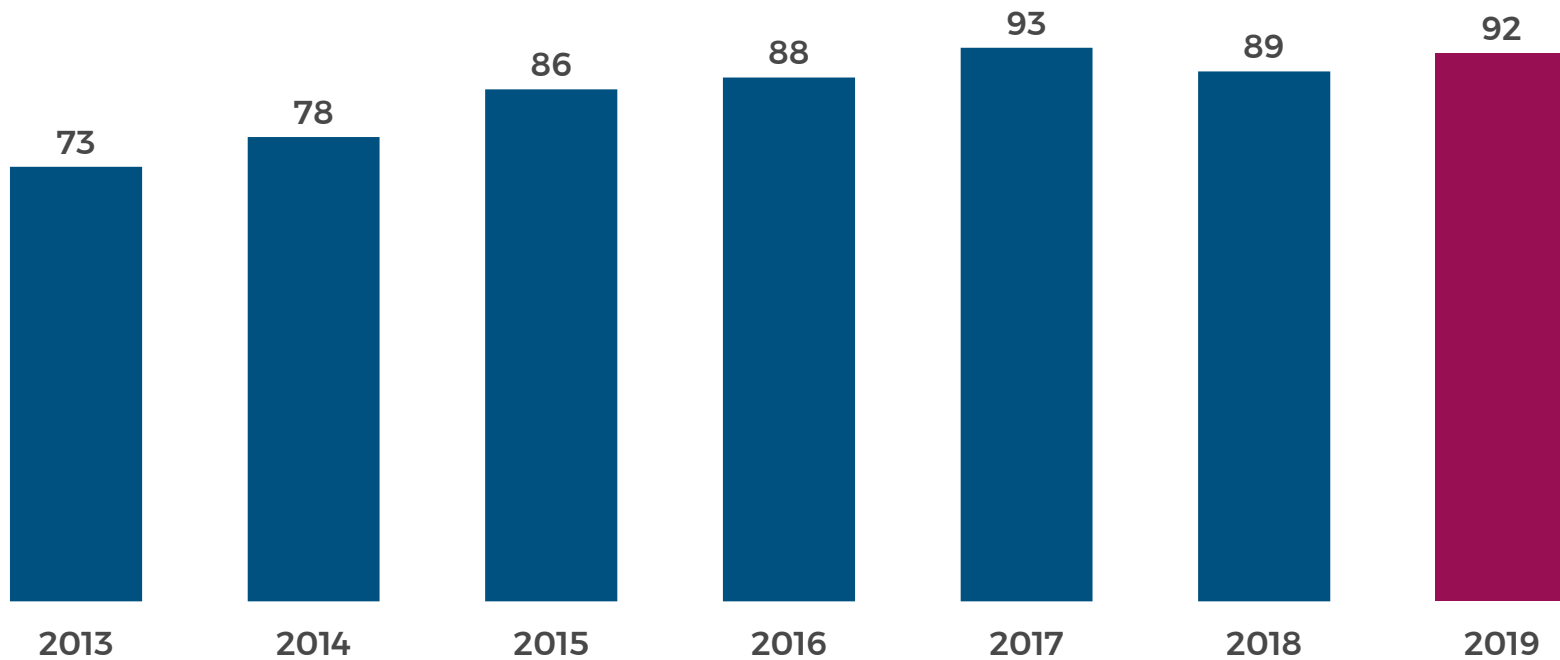


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Moms continue their social behavior

% OF MOMS WHO USE ANY SOCIAL NETWORKING SITE OR SERVICE

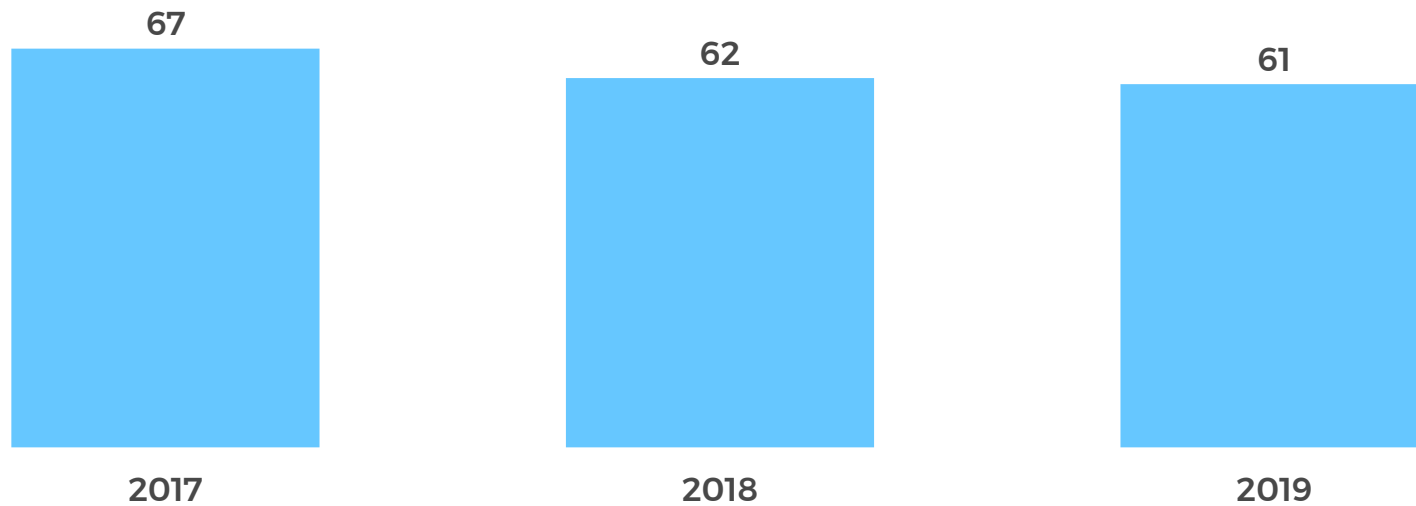


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Facebook usage among all Americans is declining

TOTAL U.S. POPULATION 12+

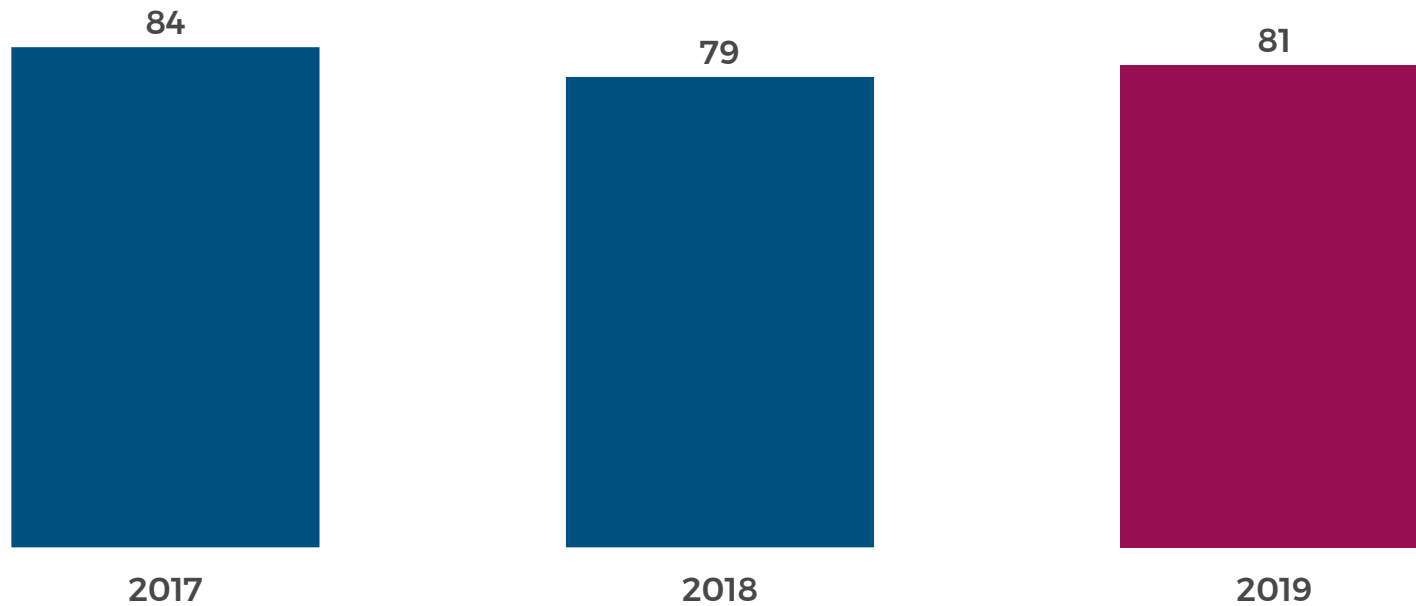
% USING FACEBOOK



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Facebook remains strong with Moms

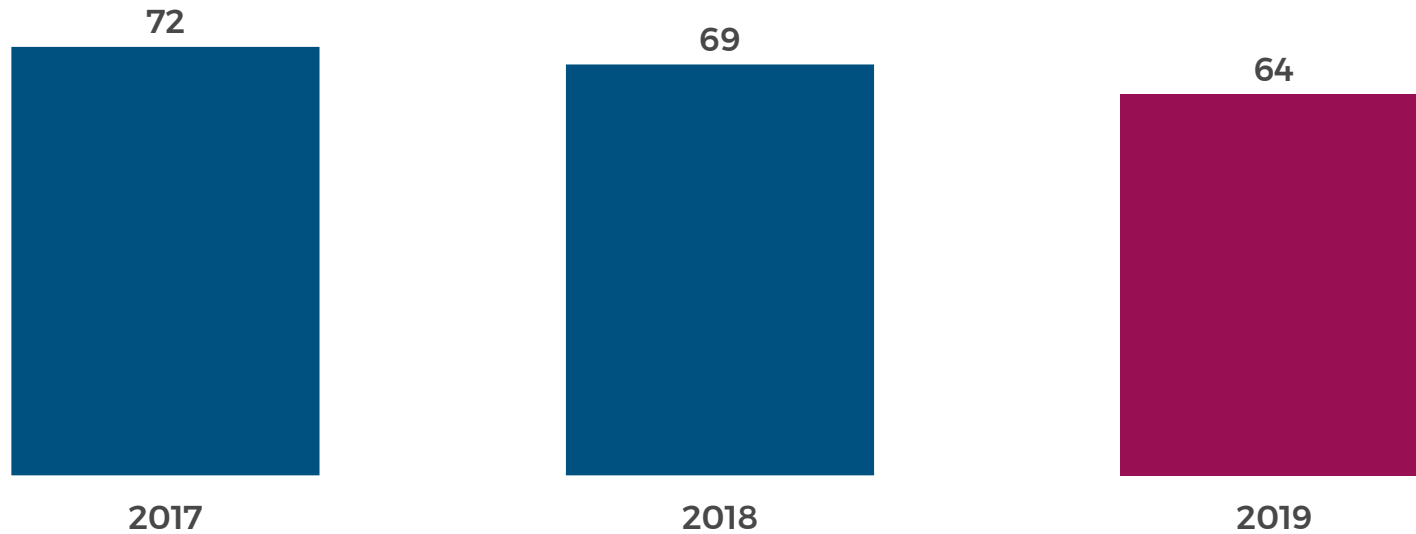
% OF MOMS WHO CURRENTLY EVER USE FACEBOOK



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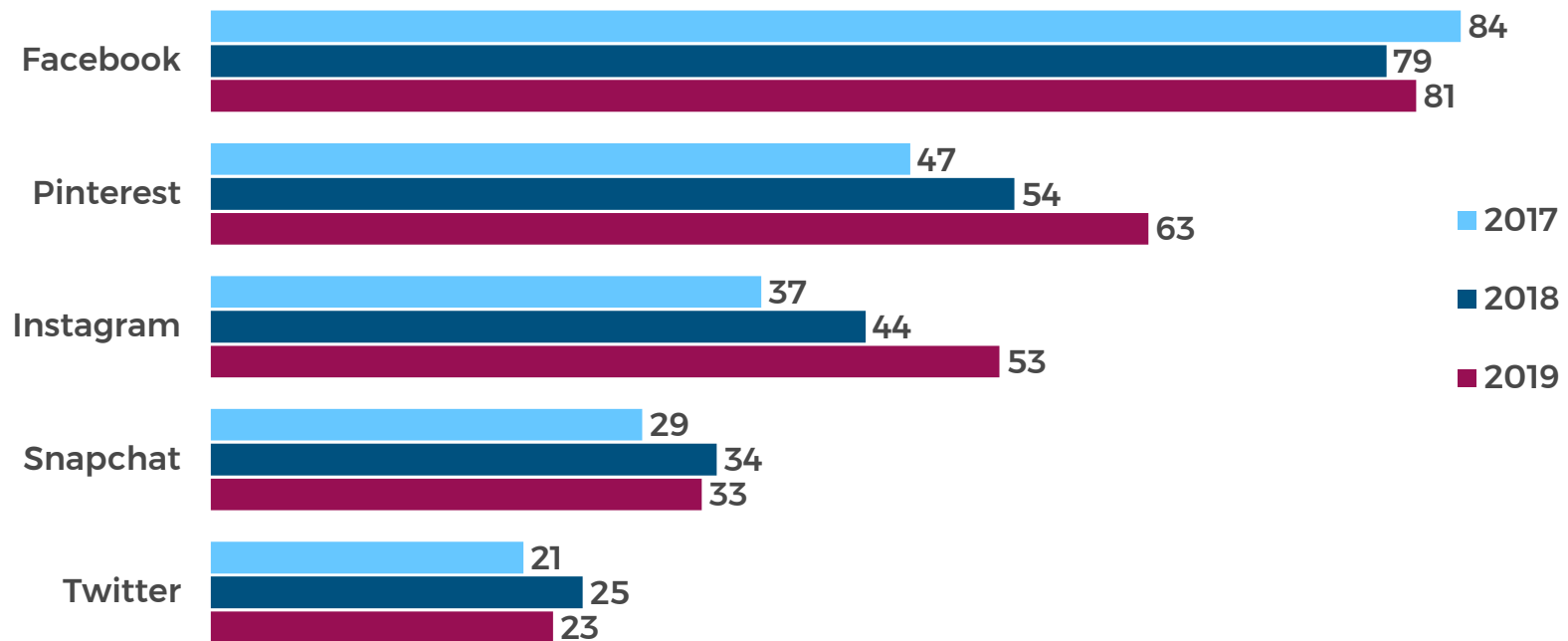
Facebook declines further as 'used most' among social media Moms

% OF MOMS WHO USE SOCIAL MEDIA AND USE FACEBOOK MOST




Sites that are in Moms' social network

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



In 2019
63% of Moms
use **Pinterest**

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Other Media Consumption and Habits

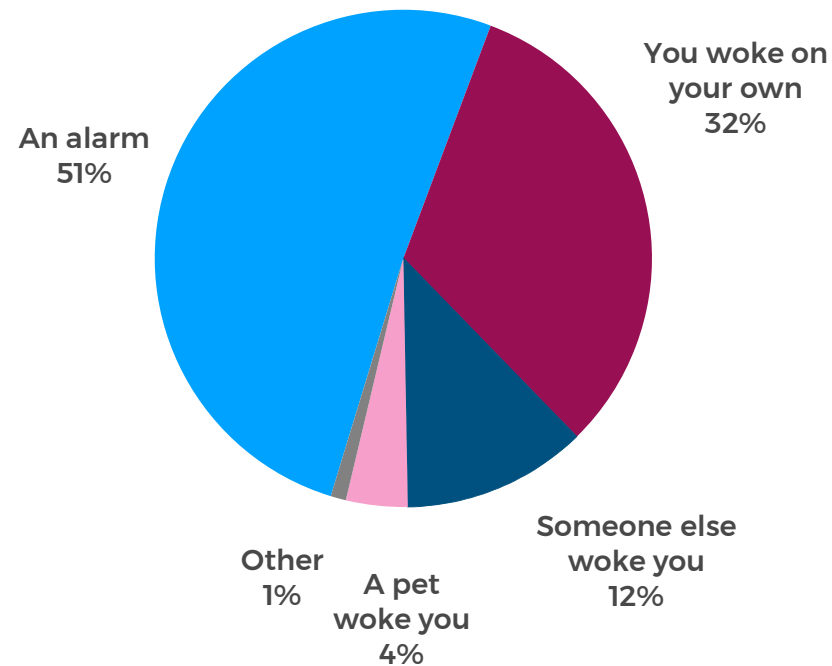


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Half of Moms wake in the morning with an alarm

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



63% of moms who set an alarm
used a **mobile device**

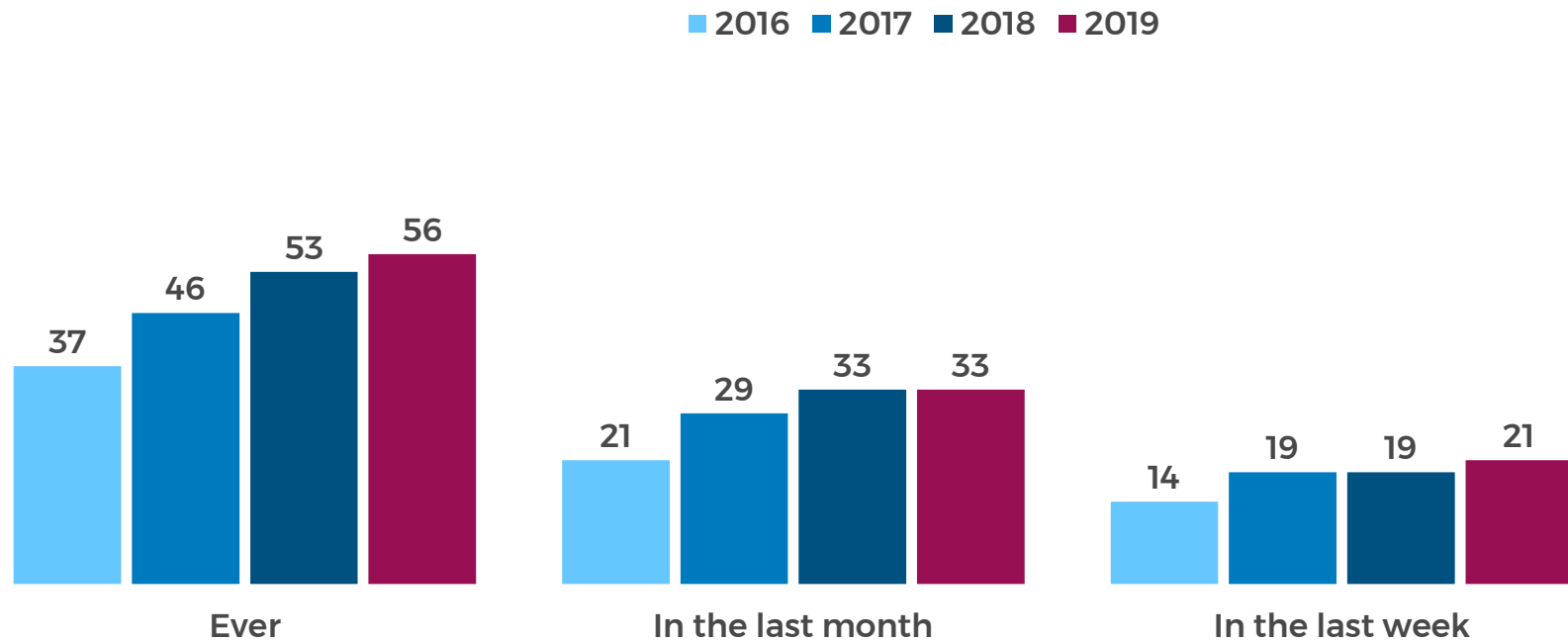
INFINITE DIAL ONLINE SURVEY



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Weekly podcast listening rises slightly among Moms

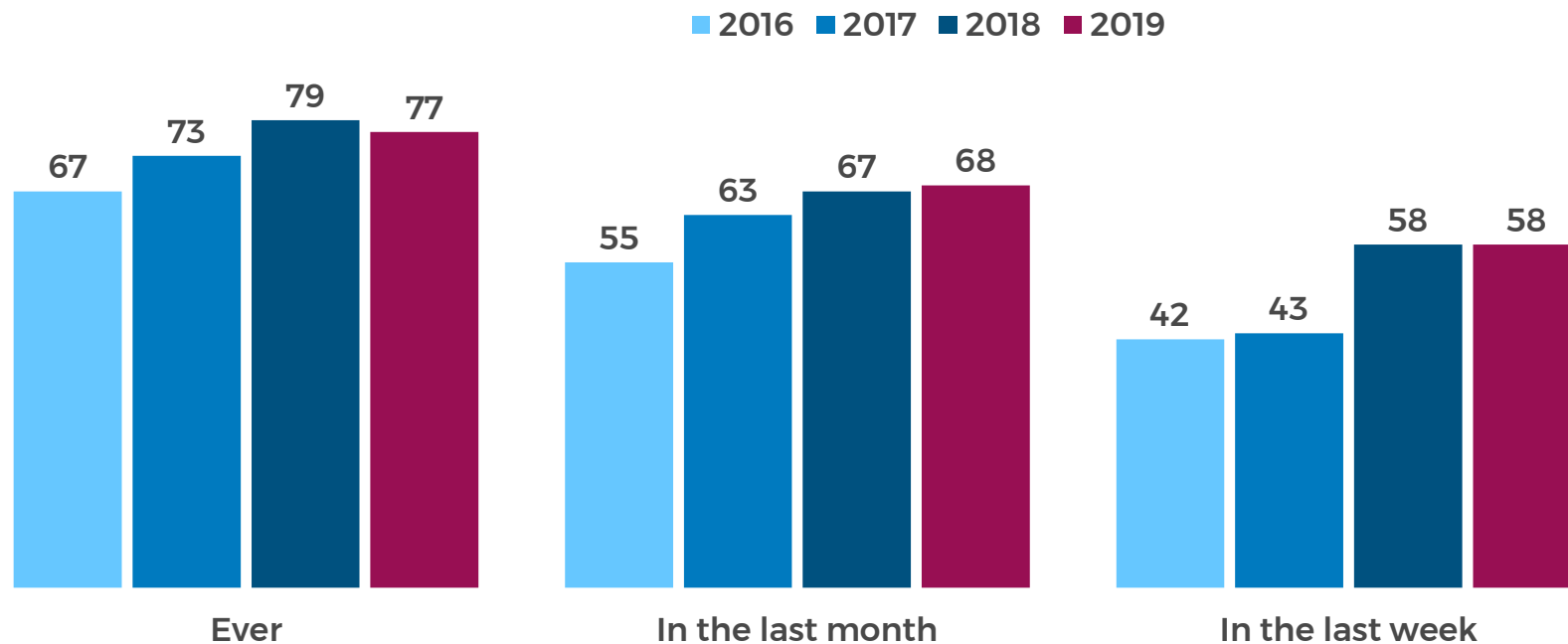
% OF MOMS WHO HAVE LISTENED TO A PODCAST



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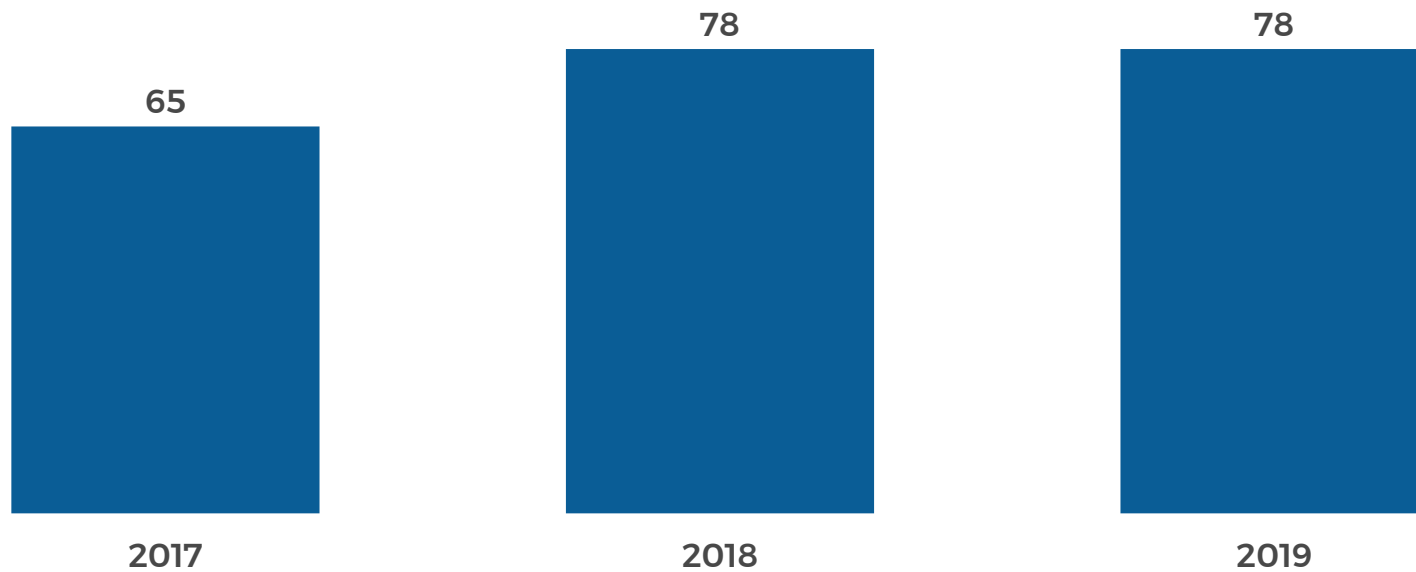
YouTube for music remains huge with Moms

% OF MOMS WHO HAVE USED YOUTUBE SPECIFICALLY TO WATCH MUSIC VIDEOS OR LISTEN TO MUSIC



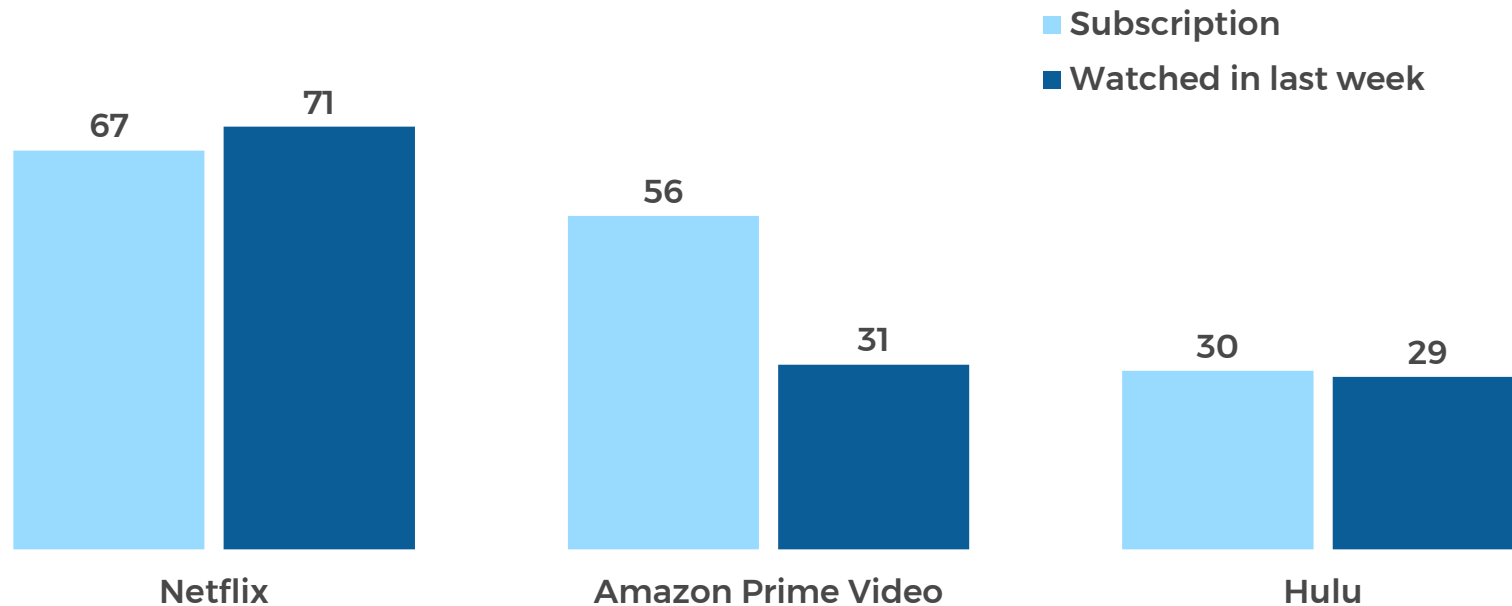
AM/FM Radio remains unchanged for Moms

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



Moms invest in video streaming

% OF MOMS WHO CURRENTLY HAVE A SUBSCRIPTION TO EACH
% OF MOMS WHO HAVE WATCHED EACH IN THE LAST WEEK



76% of moms of teens agree
that their **teenagers** assist them with new
technology

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Conclusions



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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

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