



*Marketing to Moms Coalition
State of the American Mom
2009 Highlights*

For Questions, Please Contact
Michal Clements
847.475.4200



Marketing to Moms Coalition SOAM 2009 Highlights

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I. Introduction and Purpose

The *State of the American Mom 2009* report was prepared by the Marketing to Moms Coalition.

The Marketing to Moms Coalition is an independent organization dedicated to supporting and promoting an understanding of mothers as the most powerful consumer group in the U.S.

A resource for industry professionals, the coalition is dedicated to providing insights, identifying trends and connecting members. The coalition will deliver on its mission by:

1. Sharing Best Practices
2. Disseminating proprietary research
3. Awarding the HER seal to companies and brands that honor, empower and respect mothers
4. Offering networking opportunities for like-minded marketing professionals
5. Hosting events and symposia

The purpose of the *State of the American Mom 2009* is:

1. To fulfill the mission of the Marketing to Moms Coalition
2. To provide actionable data and insights on American Moms for retailers, manufacturers and other professionals who market to Moms
3. To serve as a benchmark for ongoing tracking (building on the State of the American Mom 2007 & 2008 study)

Founding members of the Marketing to Moms Coalition (www.marketingtomomscoalition.org) include:

- Maria Bailey, CEO BSM Media
- Bridget Brennan, CEO Female Factor
- Michal Clements, Managing Partner, Insight to Action
- Amy Colton, Senior Vice President, Current Lifestyle Marketing
- Teri Lucie Thompson, VP, Marketing and Media, Purdue University

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II. Methodology

A nationally representative sample of American Moms was contacted in May-June 2009 via an online invitation. This sample was balanced on region, household size, population density, income and ethnicity.

An ending sample of 1,225 Moms with children under 18 living at home completed the online questionnaire. All Moms were recruited online through mail panel provider, Market Tools. This sample included:

- 1,013 English Speaking Moms
- 212 Spanish Speaking Hispanic Moms

Results were analyzed by Insight to Action, Inc. using more than 30 factors to understand differences and drivers of trends/behaviors. (See next page for list)



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Subgroups Available for Analysis

▶ Marital Status

- Single	173
- Married	812
- Living with Partner	95
- Divorced/Widowed/Separated	143

▶ Age of Oldest/Only Child Under 18 Living at Home

- Oldest/Only Child Age 2 and Under	155
- Oldest/Only Child Age 3-6	219
- Oldest/Only Child Age 7-12	340
- Oldest/Only Child Age 13-17	486

▶ Age of Children Under 18 Living at Home (Total Count)

- Child(ren) Age 2 and Under	351
- Child(ren) Age 3-6	441
- Child(ren) Age 7-12	539
- Child(ren) Age 13-17	486

▶ Household Income

- Under \$35,000	399
- \$35,000 - \$74,999	519
- \$75,000 or More	305

▶ Ethnicity

- African American	156
- Asian	28*
- Caucasian	669
- English-Speaking Hispanic	126
- Spanish-Speaking Hispanic	212

▶ Number of Children Under 18

- Only Child Moms	493
- Two Child Moms	459
- Three or More Child Moms	271

▶ Employment Status

- Total Working (Net)	685
- Full Time Employed	454
- Part Time Employed	150
- Self-Employed	81
- Non Working (Net)	533

▶ Mom's Education Level

- High School or Less	322
- Some College/College Grad	777
- Graduate or Professional Degree	117

▶ Opinion Leadership Groups

- Opinion Leaders	317
- Middle of the Road/Followers	727
- Late Adopters	179

▶ Retailer Customers (Past 3 Months)

- Kmart	317
- Super Target	249
- Target (limited grocery)	621
- Walmart (limited grocery)	430
- Walmart Supercenter	770

Note*: Sample Size under 50 – Directional Only



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III. Overview

The State of the American Mom Report is a large scale quantitative study which covers the many topics that reflect the shifting climate of our country and its impact on Moms. Moms represent a \$2.1 trillion market and are a multi-faceted group. This report recognizes this and therefore isolates each group, providing analysis of that group's specific needs.

In this study, a comprehensive look at Moms' opinions and behaviors is taken by using a questionnaire that includes a large array of topics facing Moms today. Topics range from external factors such as the impact of Mom focused marketing and retailer preferences to internal influences such as their top priorities regarding their kids and how kids influence household decisions.

Depth is added to our analysis by looking at these topics not only for total Moms but also by various demographic and psychographic profiles. Specifically, over 30 subgroups were created using basic criteria such as ethnicity and income supplemented by more 'nuanced' criteria such as level of opinion leadership and specific age range of kids. This approach allows us to identify not only the overarching trends but also which groups are the drivers of those trends.

Example from Report: Activities on the Internet

While checking email and paying bills online are top things all Moms do, we discovered a wide amount of variability in the popularity of other online activities across different subgroups.

Looking at Moms using one criteria, e.g. 'Total Moms', they look the same, but cutting the data differently reveals different preferences. Here, for example, we see Self Employed Moms and Moms with a higher household income (\$75,000+) are doing more activities on the internet vs. other groups.

	Total Moms	Working Status				Income			
		Total Working	Employed Full Time	Employed Part Time	Self Employed	Non Working	Under \$35,000	\$35,000-74,999	\$75,000 or More
1. Checking/sending personal email(s)	67%	66%	63%	69%	80%	67%	59%	71%	68%
2. Paying bills/other online banking	58%	59%	59%	57%	60%	56%	43%	66%	61%
3. Checking weather	51%	50%	49%	51%	53%	51%	46%	51%	55%
4. Reading news	51%	52%	51%	53%	59%	50%	43%	52%	61%
5. Downloading coupons	41%	40%	39%	40%	51%	40%	35%	44%	42%
6. Playing games online	41%	39%	36%	45%	47%	42%	46%	41%	34%
7. Using social networking websites (e.g., Facebook, Twitter, Linked In)	39%	36%	34%	43%	37%	41%	35%	40%	41%
8. Researching health/medical topics	37%	38%	34%	44%	49%	37%	30%	39%	44%
9. Shopping for myself	37%	39%	36%	42%	46%	34%	29%	36%	47%
10. Researching products/brands (including price comparisons)	36%	35%	35%	31%	48%	37%	29%	39%	40%
11. Shopping for my child(ren)	36%	38%	36%	40%	43%	33%	27%	38%	43%
12. Buying gifts for others	31%	32%	30%	33%	43%	29%	21%	32%	43%

= 8 points above Total

= 8 points below Total



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IV. Key Highlights – Marketing Impressions and Impact

There is a lot of marketing ‘upside’ when it comes to targeting Moms. About half of Moms (58%) believe that ads are effective in targeting them as a Mom. This is an increase from 54% last year.

What are the best ways to relate to Moms?

1. Depict her having fun with her kids (91%)
2. Make her laugh (87%)
3. Show her multi-tasking (87%)

Best Ways to Appeal to Moms

Mom having fun with kids



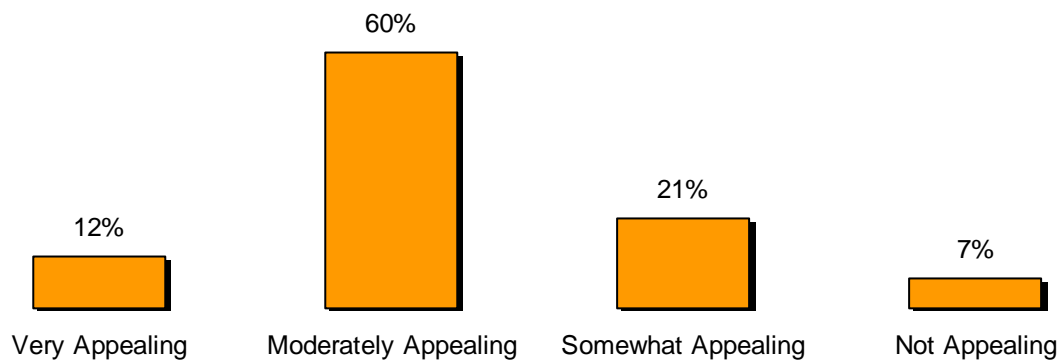
Make Mom Laugh



Mom Multi-Tasking



How Appealing Do You Generally Find Ads That Try to Relate to You as a Mom? (Total Moms)



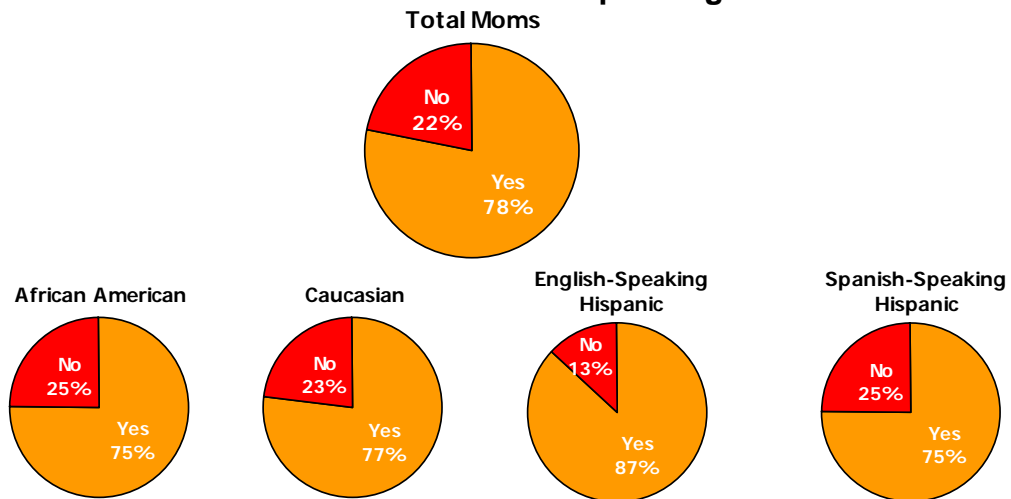


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IV. Key Highlights – Mom’s Household Spending

The 2009 study also shows the majority of Moms (78%) are cutting back on household spending this year. By analyzing the data by ethnic groups we can see that English Speaking Hispanic Moms are cutting back the most (87%).

Have You Cut Back on Household Spending This Year?



Many moms are also altering their shopping behavior. For example, 50%+ of Moms claim that they are shopping sales, buying less expensive brands and using coupons more than last year.

Shopping/Shopping Activities Moms are Doing MORE of This Year (Total Moms)





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IV. Key Highlights – Keeping Connected

The most commonly used methods to communicate and keep connected with children are cell-phones and text messaging. However, when we analyze the data by subgroup e.g. working status, ethnicity etc. we see there are differences by subgroup. For example, Working Moms are more likely to use their cell phones or texting to communicate with their children than Non-Working Moms. Among ethnic groups, African American Moms are the heaviest users of cell phones when communicating with their children and Spanish Speaking Hispanics are the heaviest users of computers to communicate with their children..

**Method Used to Communicate with Children –
Mean Times Per Week**

	Total Moms	Working Status		Ethnicity			
		Employed Full Time	Non Working	African American	Caucasian	English Speaking Hispanic	Spanish Speaking Hispanic
Cell Phone	5.1	6.4	3.9	5.9	4.8	5.3	5.7
Texting	3.3	4.1	2.6	4.4	3.1	3.3	3.7
Email	2.0	2.4	1.8	2.1	1.8	1.8	3.0
Instant Messenger	1.3	1.4	1.1	1.7	0.9	1.3	2.5
Social Media (facebook, Twitter, Myspace)	1.2	1.2	1.2	1.4	1.0	1.2	2.3
Mean times per week Total	13.0	15.6	10.6	15.5	11.6	12.9	17.2

= 8 points above Total
 = 8 points below Total








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IV. Key Highlights – Media Habits and Social Networking

Social networking continues to develop among moms as a way to communicate with friends, family and children. Since last year facebook has become the leader among Moms at 39%, overtaking MySpace (28%), the 2008 leader.

Social Networking Sites (2008 to 2009) – Total Moms

	<u>2008</u>	<u>2009</u>	<u>Point Change</u>
	15%	39%	+27 points
	42%	28%	-14 points
	1%	11%	+10 points
	3%	3%	Flat
	Not Asked	1%	NA

IV. Key Highlights – Healthy Eating Habits

Most Moms also claim they are making a stronger effort to eat health with 80% of them reading/checking food labels occasionally or frequently. Across income groups, \$75,000+ Moms are more likely to claim to frequently read labels (47%).

Frequency of Reading/Checking Ingredient Labels on Food Items/Brands

	Total Moms	Under \$35,000	\$35,000 - \$74,999	\$75,000 or More
Frequently, I almost always check labels	38%	31%	38%	47%
Occasionally, I sometimes check labels	42%	42%	42%	40%
Rarely, I seldom check labels	15%	20%	15%	11%
Never, I never check labels	5%	8%	5%	2%



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V. Complete Contents and Purchasing the Report

The report is divided into three sub-reports, each focusing on different subgroups of Moms:

Report 1	Report 2	Report 3
<ul style="list-style-type: none">▶ Working Status▶ Ethnicity▶ Household Income	<ul style="list-style-type: none">▶ Marital Status▶ Education Level▶ Opinion Leadership	<ul style="list-style-type: none">▶ Number of Children under 18▶ Age of Oldest Child Under 18▶ Age of Children Under 18

The topics covered include the following (complete table of contents on the following pages):

- Mom's Priorities and Schedules
- Family Economics
- Environmental Engagement
- Marketing Impressions/Impact
- Shopping Tendencies and Child Influence
- Food and Nutrition
- Information Sources
- Media Habits
- Social Networking
- Keeping Connected
- Demographics

The complete *State of the American Mom 2009 Report* is available for sale for \$5,000 from the Marketing to Moms Coalition, Ltd. To purchase this report, please contact: michal@itoaction.com, or call (847) 475-4200.



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Executive Summary

By Number of Children

Frequency of Shopping Activities
How Coupons are Obtained
Child Influence
Mass Merchandisers Shopped

By Oldest Child Under 18

Frequency of Shopping Activities
How Coupons are Obtained
Child Influence
Mass Merchandisers Shopped

By Age of Children Under 18

Frequency of Shopping Activities
How Coupons are Obtained
Child Influence
Mass Merchandisers Shopped

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By Number of Children

Eating/Serving Meals by Type
Approach to Leftovers
Types of Restaurants
Fast Food/Quick Serve
Casual Dining
Source of Recipes/Meal Ideas
Healthy Eating Habits
Fruits & Vegetables
Most Important Ingredients for Mom vs. Kids
Importance of Produce Being Local
Importance of Produce Being Organic



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Report 3 Detailed Table of Contents (cont'd)

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 - Eating/Serving Meals by Type
 - Approach to Leftovers
 - Types of Restaurants
 - Fast Food/Quick Serve
 - Casual Dining
 - Source of Recipes/M meal Ideas
 - Healthy Eating Habits
 - Fruits & Vegetables
 - By Age of Children Under 18**
 - Eating/Serving Meals by Type
 - Approach to Leftovers
 - Types of Restaurants
 - Fast Food/Quick Serve
 - Casual Dining
 - Source of Recipes/M meal Ideas
 - Healthy Eating Habits
 - Fruits & Vegetables

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 - Trusted Online Sources
 - Top 5 Advice
 - Advice from Family and Friends
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 - Top 5 Advice
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 - Media Use/Trends
 - Time of Day Most Likely to Use
 - Favorite Topic
 - Newspaper/Magazine/Online Reading



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Report 3 Detailed Table of Contents (cont'd)

X. Media Habits (cont'd)

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- Favorite Topic
- Newspaper/Magazine/Online Reading

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