

Marketing to Moms Coalition State of the American Mom 2010 Highlights

For Questions, Please Contact
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I. Introduction and Purpose

The *State of the American Mom 2010* 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:

- Sharing Best Practices
- 2. Disseminating proprietary research
- 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 2010 report 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, and 2009 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, Senior Principal, The Cambridge Group
- Amy Colton, Senior Vice President, Current Lifestyle Marketing
- Teri Lucie Thompson, VP, Marketing and Media, Purdue University



II. Methodology

A nationally representative sample of American Moms completed the survey in the second quarter of 2010. This sample was balanced on region, household size, population

density, income and ethnicity.

An ending sample of 1,273 Moms with kids under 18 living at home completed the online questionnaire. All Moms were recruited online through mail panel provider, Market Tools. This sample included:

- 1,073 English-Speaking Moms
- 200 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)



Subgroups Available for Analysis Total Moms - 1273

		Sample Size	Sample Size
	Marital Status - Single, Never Married - Married - Living with Partner - Divorced/Widowed/Separated	163 872 105 133	 Number of Children Under 18 Only Child Moms 527 Two Child Moms 488 Three or More Child Moms 258
*	Household Income - Under \$35,000 - \$35,000 - \$74,999 - \$75,000 or More Employment Status - Total Working (Net) - Full Time Employed - Part Time Employed - Self-Employed - Non Working (Net)	403 511 359 749 497 199 53 524	 Age of Oldest/Only Child Under 18 Living at Home Oldest/Only Child Age 2 and Under 130 Oldest/Only Child Age 3-6 243 Oldest/Only Child Age 7-12 377 Oldest/Only Child Age 13-17 523 Age of Children Under 18 Living at Home (Total Count)
•	Mom's Education Level - High School or Less - Some College/College Grad - Graduate or Professional Degree Ethnicity	284 843 143	- Child(ren) Age 2 and Under 332 - Child(ren) Age 3-6 452 - Child(ren) Age 7-12 713 - Child(ren) Age 13-17 531 Dopinion Leaders
	 African American Caucasian English-Speaking Hispanic Spanish-Speaking Hispanic All Other 	106 800 103 201 65	- Opinion Leaders 243 - Middle of the Road/Followers 672 - Late Adopters 358

Hattering to Moms Cooling

Marketing to Moms Coalition SOAM 2010 Highlights

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 the economy on moms' spending and saving habits to internal influences such as the impact of their children's request on products/brands purchased. Each year, the topics are examined to enable on-going tracking and identification of emerging trends

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: Magazines Read Regularly In Print

We discovered a wide amount of variability in the popularity of print magazines across different subgroups. Looking at moms using one criteria, e.g. 'Total Moms', revealed women and food magazines as the most popular, but cutting the data differently reveals different preferences. Here, for example, we see the #1 type of print magazine for Spanish-Speaking Hispanic moms is parenting followed by fashion at #2. African American moms also stand out for above average readership of fashion, fitness and music magazines.

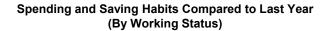
Magazines Moms Read Regularly in *Print* - By Ethnicity (of Moms Who Read Magazines Regularly)

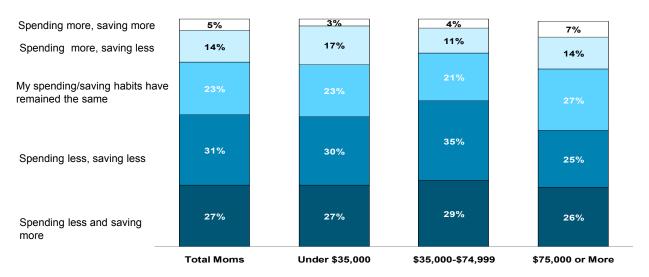
Total Moms	African American	Caucasian	English Speaking Hispanics	Spanish Speaking Hispanics	
92%	93%	92%	93%	88%	
39%	46%	41%	43%	19%	
35%	33%	35%	36%	29%	
27%	26%	27%	32%	22%	
26%	33%	22%	28%	40%	
26%	32%	24%	28%	28%	
24%	33%	19%	36%	31%	
23%	33%	21%	24%	24%	
18%	17%	16%	21%	22%	
12%	15%	13%	10%	10%	
10%	8%	10%	3%	10%	
9%	10%	8%	10%	14%	
9%	13%	8%	14%	8%	
8%	20%	6%	8%	15%	= 8 points above
8%	11%	7%	10%	12%	= 8 points below
	92% 39% 35% 27% 26% 26% 24% 23% 18% 12% 10% 9% 9% 8%	Moms American 92% 93% 39% 46% 35% 33% 27% 26% 26% 33% 26% 32% 24% 33% 23% 33% 18% 17% 12% 15% 10% 8% 9% 10% 9% 13% 8% 20%	Moms American Caucasian 92% 93% 92% 39% 46% 41% 35% 33% 35% 27% 26% 27% 26% 33% 22% 26% 32% 24% 24% 33% 19% 23% 33% 21% 18% 17% 16% 12% 15% 13% 10% 8% 10% 9% 10% 8% 9% 13% 8% 8% 20% 6%	Hotal Moms African American Caucasian Speaking Hispanics 92% 93% 92% 93% 39% 46% 41% 43% 35% 33% 35% 36% 27% 26% 27% 32% 26% 32% 24% 28% 24% 33% 19% 36% 23% 33% 21% 24% 18% 17% 16% 21% 12% 15% 13% 10% 10% 8% 10% 3% 9% 10% 8% 10% 9% 13% 8% 14% 8% 20% 6% 8%	Moms African Moms Caucasian American Speaking Hispanics Speaking Hispanics 92% 93% 92% 93% 88% 39% 46% 41% 43% 19% 35% 33% 35% 36% 29% 27% 26% 27% 32% 22% 26% 32% 24% 28% 40% 26% 32% 24% 28% 28% 24% 33% 19% 36% 31% 23% 33% 21% 24% 24% 18% 17% 16% 21% 22% 12% 15% 13% 10% 10% 10% 8% 10% 3% 10% 9% 10% 8% 10% 14% 9% 13% 8% 14% 8% 8% 20% 6% 8% 15%



IV. Key Highlights – Mom's Spending and Shopping Habits

Moms are skeptical about the health of the U.S. economy with 84% indicating the economy is staying the same or getting weaker. Consequently most moms have altered their spending/saving habits. Across income groups, 50% + of moms indicate they are spending less, including moms with higher incomes (51%)





Following suit, coupon usage while shopping is becoming more common. In the past year, over half of moms, particularly moms with lower income, claim they have increased their use of coupons.

	Total Moms	Under \$35,000	\$35,000- \$74,999	\$75,000 or More
Using More Coupons than last year	54%	63%	55%	42%
Using the Same amount of Coupons as last year	42%	32%	40%	53%
Using Less Coupons than last year	5%	5%	4%	5%



IV. Key Highlights – Mom's Media Habits

The trend toward using more "cutting edge" media continues with over one-third of moms planning to increase their use of email and cellular phones for texting. Among marital status groups, Single moms are leading the trend and are increasing their usage of all media at much higher rates.

Usage of Media Compared to Last Year – % of Moms Using More Often (By Marital Status)

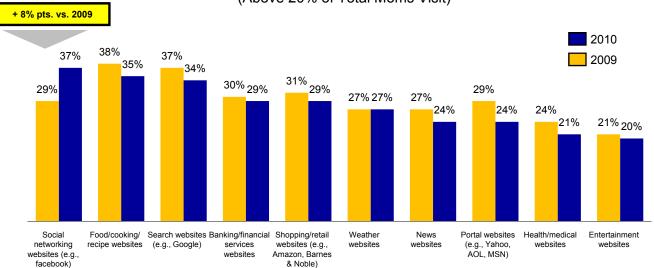
	Total Moms	Single	Married	Unmarried, Living with Partner	Divorced/ Widowed
	0504				
Email	35%	43%	34%	34%	32%
Cellular Phone/PDA for texting	33%	39%	33%	29%	32%
Internet websites/blogs	29%	33%	29%	30%	27%
Cellular Phone/PDA for phone calls	27%	32%	25%	31%	32%
Cellular Phone/PDA for email and/or internet	20%	23%	19%	21%	20%
Television	17%	29%	16%	12%	17%
Radio	Radio 14%		12%	13%	11%
Magazine	14%	18%	14%	13%	14%
Newspaper 12%		18%	11%	11%	9%
	1			= 8 p	oints below Total oints above Total points above Total



IV. Key Highlights – Social Networking

As of 2010, social networking sites are now moms' #1 type of site visited regularly, edging out food/cooking and even search websites which are also popular.

Types of Websites/Blogs Moms Visit Regularly (Above 20% of Total Moms Visit)



Today nearly 60% of moms are facebook users – this is significantly greater than 2009's 39%. Among ethnic subgroups, Hispanic moms skew higher on intensity of usage, updating their facebook status 5-6 times a week. Spanish Speaking moms are also more likely to indicate it's the *best* method to communicate with their friends (85%)

	Total Moms	African American	Caucasian	English Speaking Hispanic	Spanish Speaking Hispanic
% use facebook	59%	65%	59%	56%	57%
Reasons for Using facebook (Among users	<u>s)</u>				
It provides a way for me to reconnect with old friends that I haven't seen in ages	93%	90%	94%	90%	94%
It provides a break in the day	80%	75%	80%	79%	80%
It's the best method my friends and I have to communicate	75%	77%	72%	79%	85%
It provides up-to-the minute info	63%	70%	59%	74%	69%
I use it to connect with people for business/work reasons	33%	46%	27%	41%	43%
Mean Times Facebook Status is Updated Per Week	4.6	5.3	3.9	5.8	6.9
				= 8 points ab	ove Total
	SOAM H	ighlights 2010		= 8 points be	low Total



IV. Key Highlights – Mom's Nutrition Concerns

When shopping for food for their child, the top ingredients moms look out for are whole grains, vitamins/minerals, and fiber. Compared to total moms, moms of younger children (Infant-6 Years) are even more concerned and likely to look for/avoid a range of ingredients when shopping for food for their children

Importance of Food Ingredients/Characteristics for Child(ren)

(Top 2 Box Agreement Very/Somewhat Important)

By Age of Oldest Child

	Total Moms	Moms with Oldest Child Age 2 and Under	Moms with Oldest Child 3-6	Moms with Oldest Child 7-12	Moms with Oldest Child 13-17
Whole grains	83%	88%	84%	83%	79%
Vitamins and minerals	82%	79%	84%	82%	81%
Fiber	78%	76%	79%	75%	79%
Sugar	75%	74%	76%	75%	75%
Fat	73%	66%	71%	74%	77%
Sodium	72%	77%	68%	71%	74%
Calories	70%	65%	67%	71%	72%
No artificial ingredients or additives	68%	75%	73%	68%	65%
No high fructose corn syrup	66%	68%	68%	63%	66%
All natural	65%	71%	70%	65%	60%
No artificial sweeteners	65%	75%	69%	62%	61%
Carbohydrates	61%	59%	60%	59%	65%
No artificial colors	58%	67%	63%	58%	55%
Local to my area	51%	57%	50%	49%	51%
Organic	40%	53%	45%	38%	36%
Gluten free	31%	31%	32%	32%	30%
Lactose free	25%	25%	25%	24%	26%

= 5 -7 points above Total
= 8 points above Total

= 8 points below Total



V. Complete Contents and Purchasing the Report

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

Report 1

- Working Status
- Ethnicity
- ► Household Income

Report 2

- Marital Status
- ▶ Mom's Education Level
- Opinion Leadership

Report 3

- Number of Children under 18
- Age of Oldest/Only Child Under 18 Living at Home
- Age of Children Under 18
 Living at Home (Total
 Count)

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

- Family Economics
- Shopping Tendencies
- Food and Nutrition
- Health and Fitness
- Information Sources
- Media Habits
- Social Networking
- 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 Clements (312) 425-3600



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- Will Actually or Have Already Purchased This Year
- Put On Hold

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Source of Recipes/Meal Ideas

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Importance for Mom



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- Friends
- Medical Professional
- Internet
- Magazine
- _ T\
- Newspaper
- Social Media
- Other Sources

By Ethnicity

Most Trusted and Valued Sources

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Number of Magazines Read Regularly
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Magazines Read Regularly Online
PCs with Internet in the Home
Activities done Online

% of Moms That Use Web Communities

Type of Websites/Blogs Visited

By Ethnicity
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State of the American Mom Report 1 Appendix

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Type of Websites/Blogs Visited % of Moms That Use Web Communities

By Education Level

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Child Demographics Mom Demographics

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Approach to Major Spending Items

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- Will Actually or Have Already Purchased This Year
- Put On Hold

By Age of Oldest Child

Attitudes on the American Economy
Spending and Saving Habits Compared to last year
Experiences Faced Due to Economy in the Past Year
Items Moms are Cutting Back On (in General)
Everyday Items Willing to Sacrifice Quality On for Better Value
Approach to Major Spending Items

- Did Not Plan to Purchase This Year
- Will Actually or Have Already Purchased This Year
- Put On Hold

By Age of Children Under 18 Living at Home

Attitudes on the American Economy
Spending and Saving Habits Compared to last year
Experiences Faced Due to Economy in the Past Year
Items Moms are Cutting Back On (in General)
Everyday Items Willing to Sacrifice Quality On for Better Value
Approach to Major Spending Items

- Did Not Plan to Purchase This Year
- Will Actually or Have Already Purchased This Year
- Put On Hold



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IV. Shopping Tendencies

Executive Summary

By Number of Children

Mass Merchandisers Shopped in Past 3 Months

Coupon Usage

How Coupons are Obtained

Child Requests for Product/Brands

Items Moms Buy for Themselves as a Treat

By Age of Oldest Child

Mass Merchandisers Shopped in Past 3 Months

Coupon Usage

How Coupons are Obtained

Child Requests for Product/Brands

Items Moms Buy for Themselves as a Treat

By Age of Children Under 18 Living at Home

Mass Merchandisers Shopped in Past 3 Months

Coupon Usage

How Coupons are Obtained

Child Requests for Product/Brands

Items Moms Buy for Themselves as a Treat

V. Food and Nutrition

Executive Summary

By Number of Children

Number of Times Per Week Family Eats Dinner Together

Percent of Moms Changing the way Their Family Eats to be More Healthy

Eating/Serving Meal Types

Types of Restaurant Eating at

Approach to Leftovers

Source of Recipes/Meal Ideas

Cooking Habits

Fruits and Vegetables Eaten/Served

Importance of Produce Characteristics

Healthy Eating Habits

Top 10 Most important Food Ingredients/Characteristics

Importance of Food Ingredients/Characteristics for Child(ren)

Importance for Mom



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V. Food and Nutrition (Cont.)

By Age of Oldest Child

Number of Times Per Week Family Eats Dinner Together

Percent of Moms Changing the way Their Family Eats to be More Healthy

Eating/Serving Meal Types

Types of Restaurants Eating at

Approach to Leftovers

Source of Recipes/Meal Ideas

Cooking Habits

Fruits and Vegetables Eaten/Served

Importance of Produce Characteristics

Healthy Eating Habits

Importance of Food Ingredients/Characteristics for Child(ren)

Importance for Mom

By Age of Children Under 18 Living at Home

Number of Times Per Week Family Eats Dinner Together

Percent of Moms Changing the way Their Family Eats to be More Healthy

Eating/Serving Meal Types

Types of Restaurants Eating at

Approach to Leftovers

Source of Recipes/Meal Ideas

Cooking Habits

Fruits and Vegetables Eaten/Served

Importance of Produce Characteristics

Healthy Eating Habits

Importance of Food Ingredients/Characteristics for Child(ren)

Importance for Moms

VI. Health and Fitness

Executive Summary

By Number of Children

Critical Concerns for Your Family

Physical Activities Moms Encourage Their Kids to Participate in

Most Popular Physical Activities Summary

Most Popular Physical Activities for Children

Most Popular Physical Activities for Moms

By Age of Oldest Child

Critical Concerns for Your Family

Physical Activities Moms Encourage Their Kids to Participate in

Most Popular Physical Activities for Children

Most Popular Physical Activities for Moms

By Age of Children Under 18 Living at Home

Critical Concerns for Your Family

Physical Activities Moms Encourage Their Kids to Participate in

Most Popular Physical Activities for Children

Most Popular Physical Activities for Moms



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VII. Information Sources

Executive Summary

Trusted and Valued Sources

By Number of Children

Most Trusted and Valued Sources

Trusted Online Sources

Top Five Types of Advice From Different Sources

Advice Received From Family and Friends

Topics Moms are Most Likely to Go For Advice from:

- Family
- Friends
- Medical Professional
- Internet
- Magazine
- _ T\
- Newspaper
- Social Media
- Other Sources

By Age of Oldest Child

Most Trusted and Valued Sources

Topics Moms are Most Likely to Go For Advice from:

- Family
- Friends
- Medical Professional
- Internet
- Magazine
- T\
- Newspaper
- Social Media
- Other Sources

By Age of Children Under 18 Living at Home

Most Trusted and Valued Sources

Topics Moms are Most Likely to Go For Advice from:

- Family
- Friends
- Medical Professional
- Internet
- Magazine
- _ T\
- Newspaper
- Social Media
- Other Sources



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VIII. **Media Habits**

Executive Summary

By Number of Children

Use of Media Compared to Last Year Favorite Topic to Get Information on in Print or Online Number of Magazines Moms Read Regularly Number of Magazines Read Regularly Magazines Read Regularly in Print Magazines Read Regularly Online PCs with Internet in the Home

Activities done Online

Type of Websites/Blogs Visited % of Moms That Use Web Communities

By Age of Oldest Child

Use of Media Compared to Last Year Favorite Topic to Get Information on in Print or Online Number of Magazines Read Regularly Magazines Read Regularly in Print Magazines Read Regularly Online PCs with Internet in the Home Activities done Online Type of Websites/Blogs Visited % of Moms That Use Web Communities

By Age of Children Under 18 Living at Home

Use of Media Compared to Last Year Favorite Topic to Get Information on in Print or Online Number of Magazines Read Regularly Magazines Read Regularly in Print Magazines Read Regularly Online PCs with Internet in the Home Activities done Online Type of Websites/Blogs Visited % of Moms That Use Web Communities

IX. **Social Networking**

Executive Summary

Type of Websites/Blogs Visited Use of Social Networking Sights Use of Facebook and Twitter "Trusted and Valued" Social Media Source Top Things Shared Online



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IX. Social Networking (Cont.)

By Number of Children

What Moms Share Online

Use of Facebook

Use of Twitter

Use of Other Social Media

Children's Use of Social Networking

By Age of Oldest Child

What Moms Share Online

Use of Facebook

Use of Twitter

Use of Other Social Media

Children's Use of Social Networking

By Age of Children Under 18 Living at Home

What Moms Share Online

Use of Facebook

Use of Twitter

Use of Other Social Media

Children's Use of Social Networking

X. Demographics

Executive Summary

By Number of Children

Child Demographics

Mom Demographics

By Age of Oldest Child

Child Demographics

Mom Demographics

By Age of Children Under 18 Living at Home

Child Demographics

Mom Demographics

State of the American Mom Report 3 Appendix

Websites/Blogs Read Regularly – By Number of Children

Websites/Blogs Read Regularly – By Age of Oldest Child

Websites/Blogs Read Regularly - By Age of Children Under 18 Living at Home