



Marketing to Moms Coalition
State of the American Mom
2011 Highlights

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Marketing to Moms Coalition SOAM 2011 Highlights



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Marketing to Moms Coalition SOAM 2011 Highlights

I. Introduction and Purpose

The *SOAM 2011 Highlights* 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 *SOAM 2011 Highlights* Report is:

1. To fulfill the mission of the Marketing to Moms Coalition
2. To provide actionable data and insights on how American Moms are approaching Back to School 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, 2009 and 2010 studies)

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, Executive Vice President, Current Lifestyle Marketing
- Teri Lucie Thompson, CMO and VP Marketing & Media, Purdue University



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II. Methodology

A nationally representative sample of American Moms completed the survey in the second quarter of 2011. This sample was balanced on region, household size, population density, income and ethnicity.

An ending sample of 1,270 Moms with kids under 18 living at home completed the online questionnaire. All Moms were recruited online through mail panel provider, Market Tools. The sample included:

- ▶ 1,059 English-speaking moms
- ▶ 211 Spanish-Speaking Moms
- ▶ 138 Spanish-Speaking Hispanic Moms (subset of Spanish Speakers)

This report looks at Back to School Moms with a focus on moms of elementary and Results were analyzed by the Marketing to Moms Coalition. Unlike previous years, the 2011 analysis was conducted by Generational Subgroups, including Millennial Moms, Gen X Moms and Boomer Moms.



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Subgroups Available for Analysis Total Moms – 1270

Focus Subgroups

Total Moms	1,270
Millennial Moms	283
GenX Moms	621
Boomer Moms	366
▶ Millennial Moms	
- 18-24	142
- 25-29	141
▶ GenX Moms	
- 30-34	225
- 35-39	191
- 40-44	205
▶ Boomer Moms	
- 45-49	168
- 50-54	93
- 55-64	105

Other Subgroups

Total Moms	1,270
▶ Multicultural Group	
- African American	117
- Caucasian	815
- English-Speaking Hispanic	108
- Spanish-Speaking Hispanic	138
- Asian	51
▶ Household Income	
- HHI Under \$35K	405
- HHI \$35-\$74.9K	484
- HHI Over \$75K	381
▶ Number of Children	
- One Child	565
- Two Children	485
- Three+ Children	220

Other Subgroups

▶ Working Status	
- Total Moms	1,270
- Total Working (net)	762
- Full-Time Employed	500
- Part-Time Employed	194
- Self-Employed	68
- Homemaker (not working)	304
- Other not working	204
▶ Age of Oldest Child	
- Oldest <2	123
- Oldest 3-6	235
- Oldest 7-12	384
- Oldest 13-17	528
▶ Any Child in Age Range	
- Oldest <2	263
- Oldest 3-6	439
- Oldest 7-12	561
- Oldest 13-17	536



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III. Overview

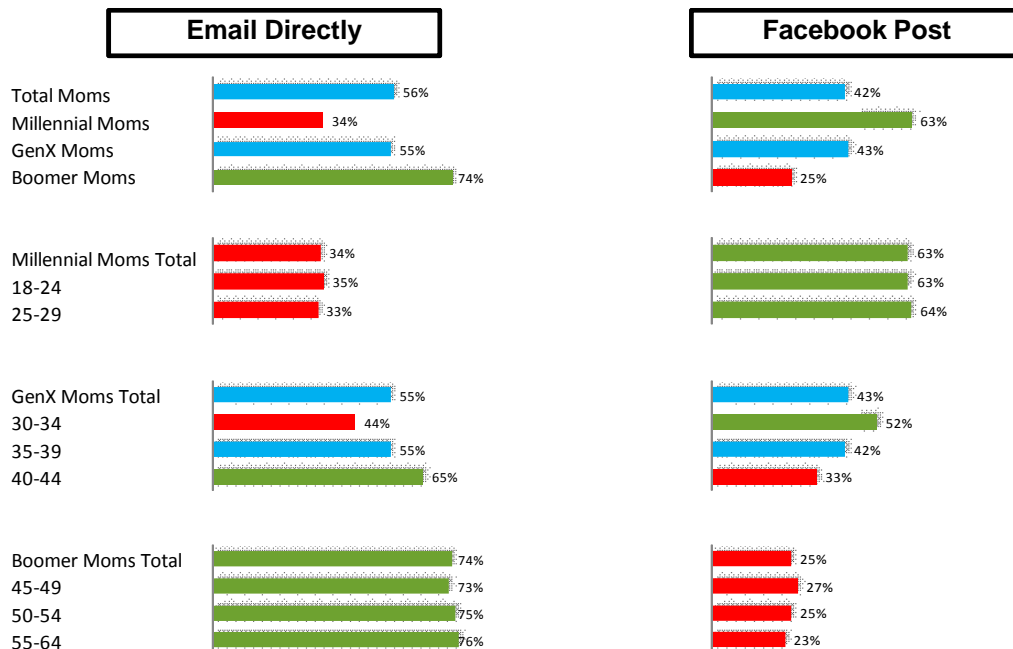
The State of the American Mom Report is a large scale quantitative study which covers the many topics that reflect the shifting climate of our country and its impact on Moms. Moms represent a \$2.4 trillion market and are a multi-faceted group. This report recognizes this and therefore isolates each 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 included this year as a major focus were: family economics, technology, food and nutrition, causes and inspiration, information sources, media habits and social networking.

Depth is added to our analysis by looking at these topics not only for total Moms but also by various demographic and generational groups. Specifically, over 30 subgroups were created using basic criteria such as ethnicity and income supplemented by more 'nuanced' criteria such as 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: Social Networking

We discovered variability in the social networking habits of the different mom generational groups for their own behaviors. Specifically, Millennial Moms are most likely to use Facebook to share, while Boomer Moms are most likely to use email to share. GenerationX Moms are split; the youngest subgroup (30-34) use Facebook more, while 35-44 use email most to share.



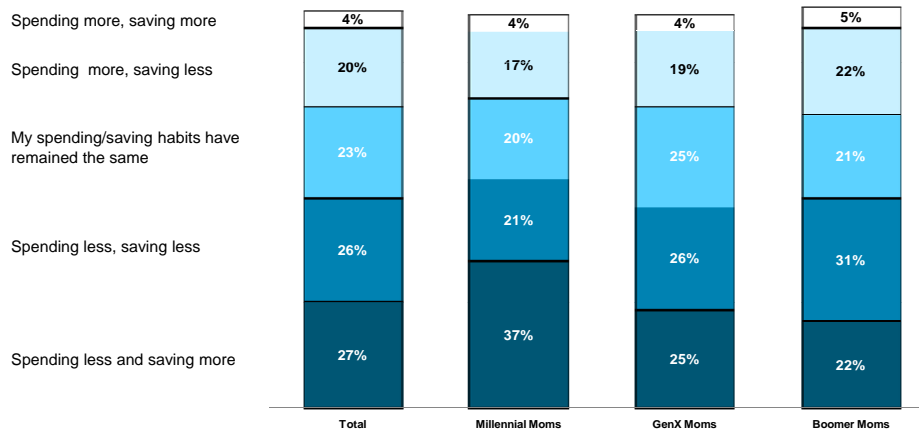


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IV. Key Highlights – Mom’s Spending and Shopping Habits

Moms are skeptical about the health of the U.S. economy with 85% indicating the economy is staying the same or getting weaker. Consequently most moms have altered their spending/saving habits. Millennial Moms are the most likely to be spending less (58%) compared to the other Generational Groups.

**Spending and Saving Habits Compared to Last Year
By Generational Group**



Moms are adopting a range of cost-saving approaches, including using more coupons, shopping more sales, buying store brand more often and even cutting back on eating out and entertainment.

**Experiences Faced Due to Economy in the Past Year
By Generational Group**

	Total Moms	Millennial Moms	GenX Moms	Boomer Moms
1 Using coupons more often	68%	60%	65%	72%
2 Eating out less often	62%	57%	61%	69%
3 Shopping sales more often	58%	52%	57%	67%
4 Spending less on entertainment	54%	48%	51%	63%
5 Buying store brands more often	49%	44%	49%	53%
6 Sharing rides more often	13%	17%	10%	15%
7 None of these	10%	12%	11%	5%
8 Taking public transportation often	7%	9%	6%	8%

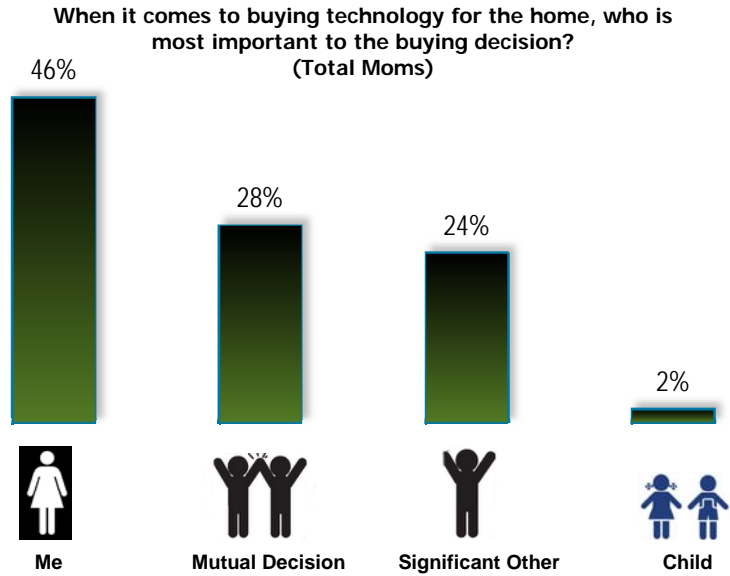
= 4 points above/below Total Moms
 = 7 points above/below Total Moms
 = 7 points below Total Moms



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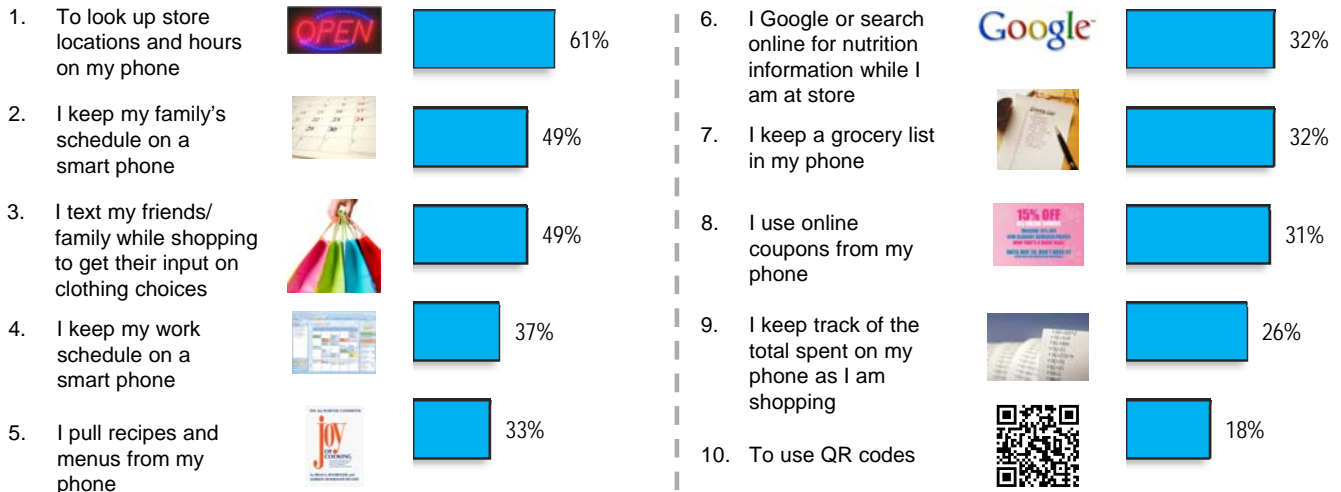
IV. Key Highlights – Technology and Social Media

Moms are very involved with the household technology decisions.



Among the 44% of moms who own a smart phone, they are giving the smart phone a good workout. Top uses include: looking up store locations and hours (61%), keeping family schedule (49%) and work schedule (37%), texting family and friends while shopping to get their input on clothing decisions (49%).

Situations where Moms use the smart phone (Among the 44% of Moms who own smart phones)





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IV. Key Highlights – Technology and Social Media

Millennial Moms who own smart phones use them for more situations than GenX Moms or Boomer Moms.

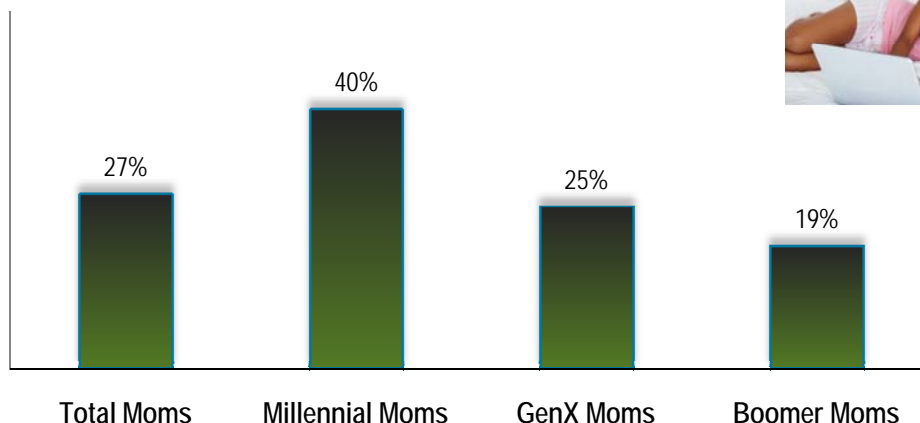
Which of the following situations do you use your smart phone for?
(Among those who own a smart phone)
By Generational Group

	Total Moms	Millennial Moms	GenX Moms	Boomer Moms
% Who own a smart phone	44%	53%	47%	33%
1 I look up store locations and hours on my phone	61%	72%	59%	55%
2 I keep my family's schedule on a smart phone	49%	52%	50%	45%
3 I text my friends/family while I am shopping to get their input on clothing decisions	49%	59%	45%	48%
4 I keep my work schedule on a smart phone	37%	40%	38%	29%
5 I pull recipes and menus from my phone	33%	44%	33%	18%
6 I Google or search online for nutrition information while I am in the store	32%	40%	30%	27%
7 I keep my grocery list in my phone	32%	42%	29%	24%
8 I use online coupons from my phone	31%	37%	29%	30%
9 I keep track of the total spent on my phone as I am shopping	26%	34%	25%	20%
10 To use QR codes	18%	24%	15%	18%

= 4 points above/below Total Moms
 = 7 points above/below Total Moms
 = 7 points below Total Moms

Around one quarter of moms take their technology to bed with them. This differs by generation with Millennials by far the most likely (40%).

Do you take your technology to bed?
By Generational Group



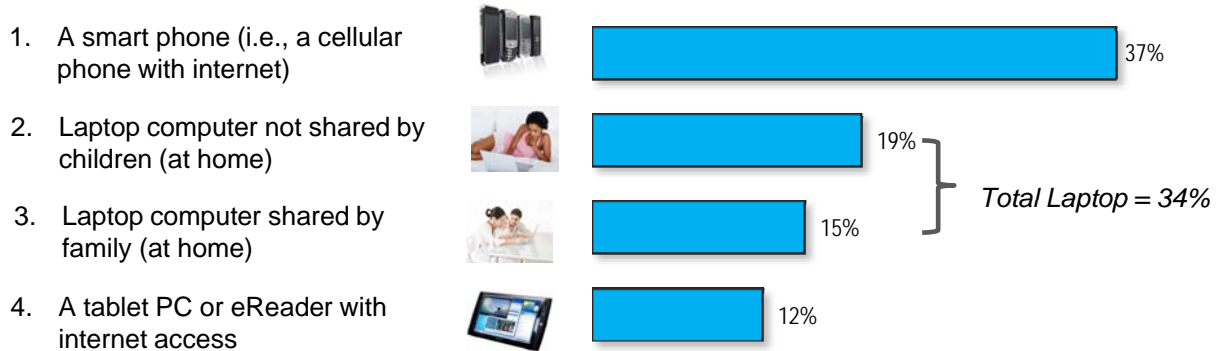


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IV. Key Highlights – Technology and Social Media

Smart phones are the most frequently taken to bed, while eReader use is small.

**What type of technology device do you take to bed?
(Among the 27% of Moms who take technology to bed)**



Moms typically claim to give their child a cell phone when their child is ages 10-17, whereas Internet accessible 'learning tools' are given when their child is 3 to 9

**Youngest age at which you...
By Generational Group**

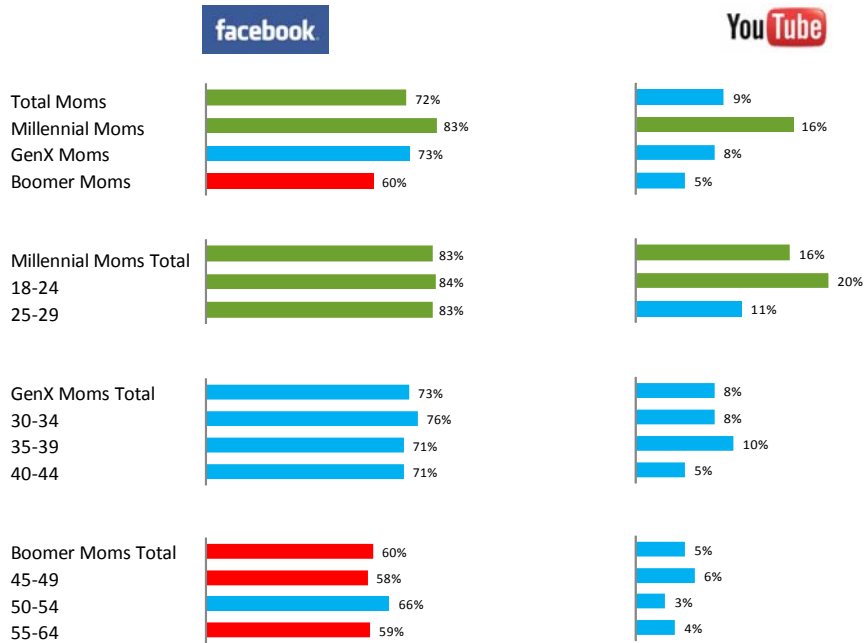
	Total Moms	Millennial Moms	GenX Moms	Boomer Moms
<u>Gave or plan to give your child a cell phone</u>				
Under age 2	2%	5%	2%	2%
Age 3 to 6	3%	6%	3%	1%
Age 7 to 9	8%	9%	10%	5%
Age 10 to 12	26%	19%	31%	22%
Age 13 to 17	47%	51%	42%	53%
Won't give a cell phone	13%	11%	13%	16%
<u>Gave or plan to give your child an internet accessible learning tool</u>				
Under age 2	4%	6%	4%	4%
Age 3 to 6	25%	27%	26%	20%
Age 7 to 9	16%	18%	17%	11%
Age 10 to 12	17%	14%	18%	17%
Age 13 to 17	21%	20%	19%	27%
Won't give an internet accessible learning tool	17%	15%	15%	21%
<u>Your child first played an online or digitally based game</u>				
Under age 2	6%	8%	6%	4%
Age 3 to 6	34%	36%	40%	23%
Age 7 to 9	20%	13%	21%	25%
Age 10 to 12	15%	13%	13%	19%
Age 13 to 17	10%	6%	8%	17%
My child has not played an online or digitally based game	15%	23%	12%	12%



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IV. Key Highlights – Technology and Social Media

Facebook is the most regularly used social networking tool among all generations of moms.



Millennial Moms are more regularly active on Facebook

What do you post most often on Facebook?
(% who do this weekly or more often)



	Total Moms	Millennial Moms	GenX Moms	Boomer Moms
Post a personal status update	48%	56%	49%	39%
Share news about a friend or relative	37%	37%	37%	38%
Share an interesting piece or news of information	40%	43%	38%	40%
Post information about an event to support a cause you care about	22%	23%	23%	23%
Share a personal photo	31%	42%	33%	9%

= 4 points above/below Total Moms
 = 7 points above/below Total Moms
 = 7 points below Total Moms

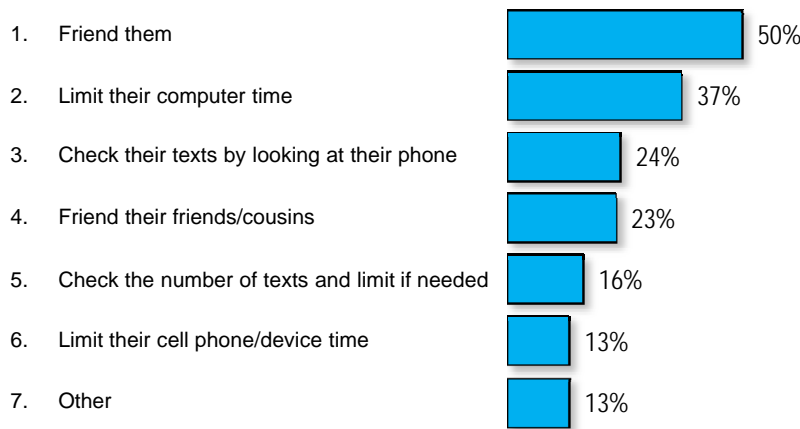


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IV. Key Highlights – Technology and Social Media

Moms are most likely to rely on ‘friending’ their child and limiting computer time to monitor their child’s social media habits

How if at all, do you monitor your child’s social media habits? (Check all that apply)
(Total Moms)



Moms focus more on monitoring the computer than the phone

Note: Follow them on Twitter was 6%

While computer is #1 for all, Boomer Moms skew to desktops and Millennial Moms skew to laptops and smart phones

Personally own and use the most

	Total Moms	Millennial Moms	GenX Moms	Boomer Moms
Laptop computer with Internet access	43%	48%	42%	40%
Desktop computer with Internet access	43%	29%	40%	57%
A smart phone (i.e., a cellular phone with Internet access)	24%	30%	26%	14%
A cellular phone that does not have Internet access	21%	19%	20%	25%
An iPod Touch with Internet access	7%	8%	7%	4%
Tablet PC or eReader for books	5%	3%	6%	6%
Do not own any of these	3%	4%	3%	1%

- = 4 points above/below Total Moms
- = 7 points above/below Total Moms
- = 7 points below Total Moms

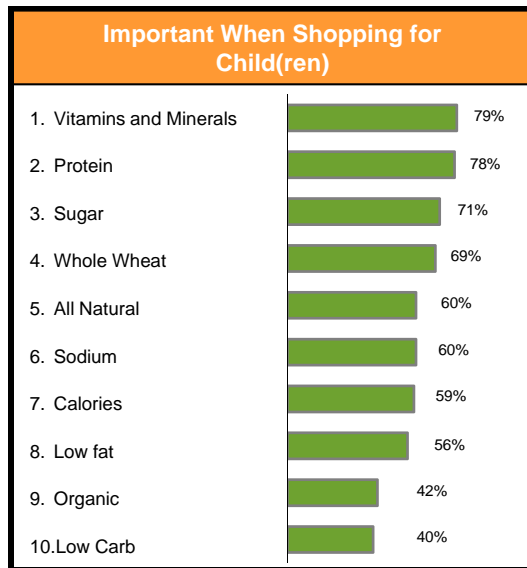


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V. Key Highlights – Food and Nutrition

Protein, vitamins, minerals, sugar and whole wheat are important for both moms and their children. When focusing just on moms, calories are important.

Top 10 Most Important Food Ingredients/Characteristics
Top 2 Box Agreement Very/Somewhat Important
 (Total Moms)





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VI. Key Highlights – Halloween 2011

Halloween is a special holiday for moms. Many moms are enthusiastically involved with Halloween, along with their children. Most moms (58%) and their children (72%) really enjoy and are enthusiastic about celebrating Halloween. This enjoyment is found at even higher levels among Millennial moms, Gen X moms, English speaking Hispanic moms, Homemaker moms, and moms of preschool and elementary schoolchildren.

Decorating and parties are popular



*Note: among those who decorate

The most popular categories for mom's Halloween dollar are candy and other treats for trick or treaters, pumpkins, children's costumes, makeup & wigs, adult costumes.



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VII. Complete Contents and Purchasing the 2011 Report

The report is available by generational group: Millennials, GenX and Boomers. Within the generations, the age groups are further subdivided: 18-24, 25-29, 30-34, 35-39, 40-44, 45-49, 50-54, 55-64.

The following topics are covered in the report:

- Family Economics
- Technology
- Food and Nutrition
- Causes and Inspiration
- Information Sources
- Media Habits
- Social Networking

The complete State of the American Mom 2009 Report is available for sale for \$2,000 from the Marketing to Moms Coalition, Ltd. To purchase this report, please contact: Michal Clements (224) 944-7971.