



Marketing to Moms Coalition

State of the American Mom *2008 Highlights*

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Marketing to Moms Coalition State of the American Mom 2008



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Marketing to Moms Coalition

State of the American Mom 2008

I. INTRODUCTION AND PURPOSE

The *State of the American Mom 2008* 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
- Disseminating proprietary research
- Awarding the HER seal to companies and brands that honor, empower and respect mothers
- Offering networking opportunities for like-minded marketing professionals
- Hosting events and symposia

The purpose of the *State of the American Mom 2008* 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 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 completed the survey in the Third Quarter of 2008. This sample was balanced on region, household size, population density, income and ethnicity

An ending sample of 1,033 English Speaking Moms with kids under 18 living at home completed the online questionnaire. All Moms were recruited online through mail panel provider, Market Tools

A Spanish Speaking sample of 204 Moms also completed the study and can be analyzed as a distinct group

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	132
- Married	639
- Living with Partner	88
- Divorced/Widowed/Separated	174

▶ Age of Children Living at Home

- Under age 6	638
- Age 7-12	420
- Age 13-18	344

▶ Moms of Infants/Toddlers

- New Mom of One Child Under 2	88
- Mom of Multiple Children (One of Which Under 2)	336

▶ Household Income

- Under \$35,000	419
- \$35,000-\$74,999	387
- \$75,000 or More	227

▶ Ethnicity

- African American	204
- Caucasian	580
- English-Speaking Hispanic	189
- Spanish-Speaking Hispanic	204

▶ Number of Children

- Only Child Moms	446
- Two Child Moms	356
- Three or More Child Moms	231

▶ Employment Status

- Total Working (Net)	605
- Full-Time Employed	418
- Part-Time Employed	136
- Self-Employed	51
- Non-Working (Net)	422

▶ Mom's Educational Level

- High School or Less	255
- Some College/College Grad	691
- Graduate/Professional Degree	84

▶ Opinion Leadership Groups

- Opinion Leaders	261
- Middle of the Road/Followers	538
- Late Adopters	234

▶ Parenting Style

- Permissive Mom	524
- Progressive Mom	760
- Traditional Mom	722

▶ Retailer Customers

- 7-Eleven	220
- Abercrombie & Fitch	75
- Albertsons	148
- American Eagle	104
- Best Buy	431
- BJ Wholesale	102
- Circle K	86
- Circuit City	213
- Costco	198
- CVS	424
- Express	68
- Food Lion	75
- GAP/GAP Kids	196
- Gas station convenience store	369
- JC Penney	427
- Kmart	321
- Kohl's	360
- Kroger/Kroger Marketplace	203
- Macy's	239
- Nordstrom	60

▶ Retailer Customers - contd.

- Office Depot	264
- Office Max	194
- Old Navy	379
- Publix	83
- Radio Shack	140
- Rite Aid	269
- Safeway	115
- Sam's Club	312
- Sears	268
- Staples	273
- Stop & Shop	55
- Super Target	184
- Target (limited grocery)	514
- The Limited/Limited Too	73
- Trader Joe's	76
- Victoria's Secret	244
- Wa Wa	50
- Walgreens	569
- Wal-Mart (limited grocery)	337
- Wal-Mart Neighborhood Market (grocery only)	69
- Wal-Mart Supercenter	669
- Whole Foods	67



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State of the American Mom 2008

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 that Moms in high income households (\$75,000+) are doing many more activities on the internet vs. other groups.

	Total Moms	Income			Ethnicity		
		Under \$35,000	\$35,000-74,999	\$75,000 or More	African American	Caucasian	English-Speaking Hispanic
1. Checking/sending email	85%	86%	87%	80%	83%	86%	88%
2. Paying bills/other online banking	64%	58%	69%	67%	66%	62%	70%
3. Reading news	57%	52%	59%	62%	50%	57%	62%
4. Checking weather	56%	55%	55%	58%	43%	61%	54%
5. Researching products	49%	41%	54%	55%	38%	51%	51%
6. Playing game online	46%	52%	47%	33%	50%	44%	47%
7. Shopping for my child(ren)	45%	35%	50%	54%	34%	48%	46%
8. Shopping for myself	44%	36%	48%	52%	46%	43%	42%
9. Planning travel, including local travel, such as maps or looking at directions	39%	28%	38%	60%	34%	39%	41%
10. Researching health care information	38%	33%	38%	47%	33%	39%	39%
11. Downloading coupons	36%	32%	39%	41%	32%	38%	38%
12. Buying gifts for others	35%	25%	38%	49%	24%	39%	33%

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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 (54%) believe that ads are effective in targeting them as a Mom, but many Moms (46%) do not.

What are the best ways to relate to Moms?

1. Depict her having fun with her kids (87%)
2. Show her multi-tasking (86%)
3. Make her laugh (86%)

Best Ways to Appeal to Moms

Mom having fun with kids



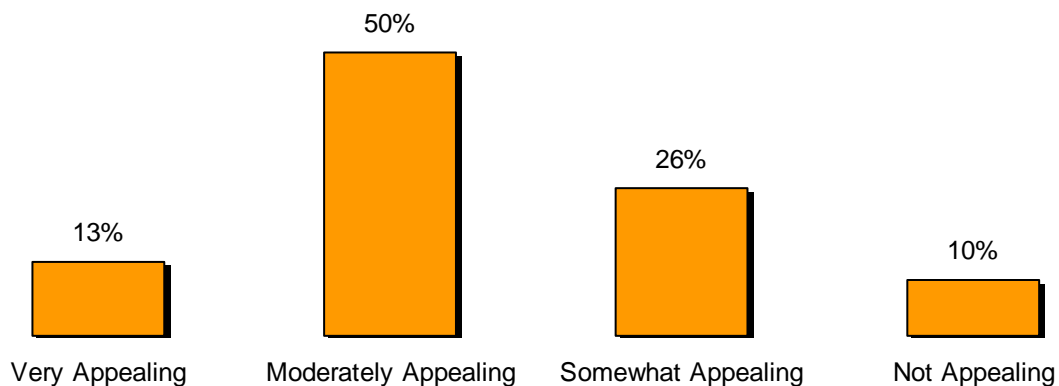
Mom Multi-Tasking



Make Mom Laugh



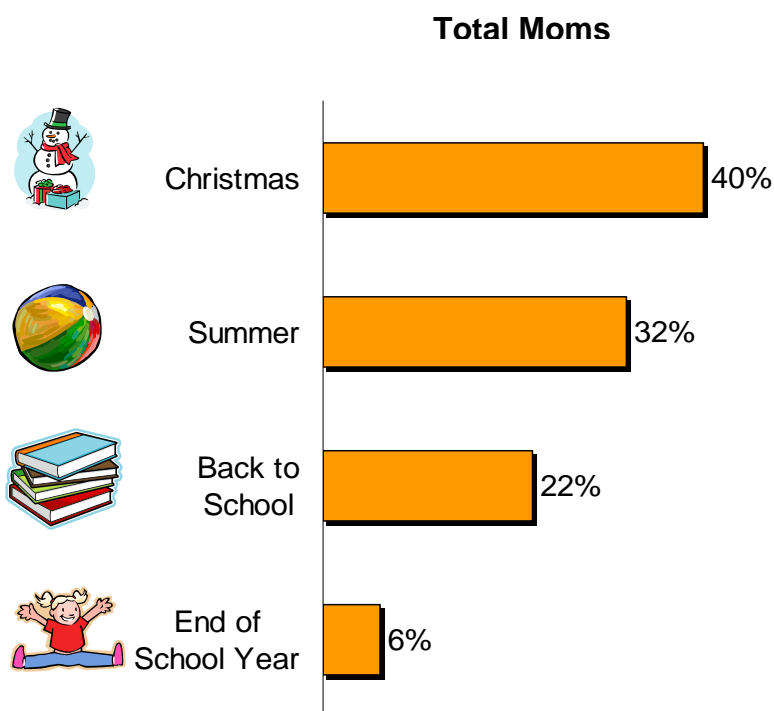
How Appealing Do You Generally Find Ads That Try to Relate to You as a Mom? (Total Moms)



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IV. Key Highlights – Busiest Time of Year

In general, most Moms (40%) view the Christmas holidays to be the busiest time of the year, followed by the summer when children are off from school.



However, when we analyze this data by subgroup, e.g. ethnicity, work status, etc., we see that there are differences by subgroup. For example, Self-Employed Moms and African American Moms view summer and back to school, respectively, as the busiest time of year.

	Total Moms	Working Status					Ethnicity		
		Total Working	Employed Full Time	Employed Part Time	Self-Employed	Non Working	African American	Caucasian	English-Speaking Hispanic
Christmas holidays	40%	38%	38%	38%	39%	42%	28%	44%	38%
Summer	32%	31%	28%	34%	43%	35%	34%	32%	32%
Back to school	22%	25%	28%	21%	12%	18%	33%	17%	26%
End of the school year	6%	6%	6%	8%	6%	5%	5%	7%	4%

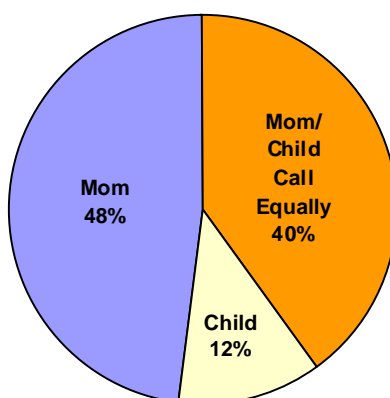


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IV. Key Highlights – Keeping Connected

By far, the most commonly used methods to communicate and keep connected with children are cell-phones and text messaging. Eighty percent of Moms agree that the cell phone is a direct line to children/sitter and 60% are using text messaging. Most of this contact is either being initiated by Moms (48%) or equally initiated by Mom and child (41%).

Who Initiates the Call?



By subgroup, there are differences in the methods used to communicate with children and also the activities done on the internet. For example, by ethnicity African American Moms are the heaviest users of cell phones when communicating 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
Cell phone	3.6	4.6	3.5	4.7	3.1	3.8
Texting	2.2	2.9	1.4	2.6	1.9	2.5
Email	1.5	2.0	1.2	1.9	1.2	1.8
Instant Messenger	1.4	1.8	0.9	1.6	1.1	1.6
Mean Total	8.6	11.3	7.1	10.7	7.4	9.7



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V. COMPLETE CONTENTS AND PURCHASING THE REPORT

The topics covered include the following:

- Juggling Family Life Demands
- Keeping Connected
- The Most Important Priorities
- “Green” Interest
- Marketing Impressions/Impact
- Shopping and Retailer Tendencies
- Kid Influences on Household Purchase Decisions
- Demographics
- Comparison to 2007

The complete 2008 State of the American Mom 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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