



MOMS and the DIGITAL ECOSYSTEM

Trends and Implications for Marketers

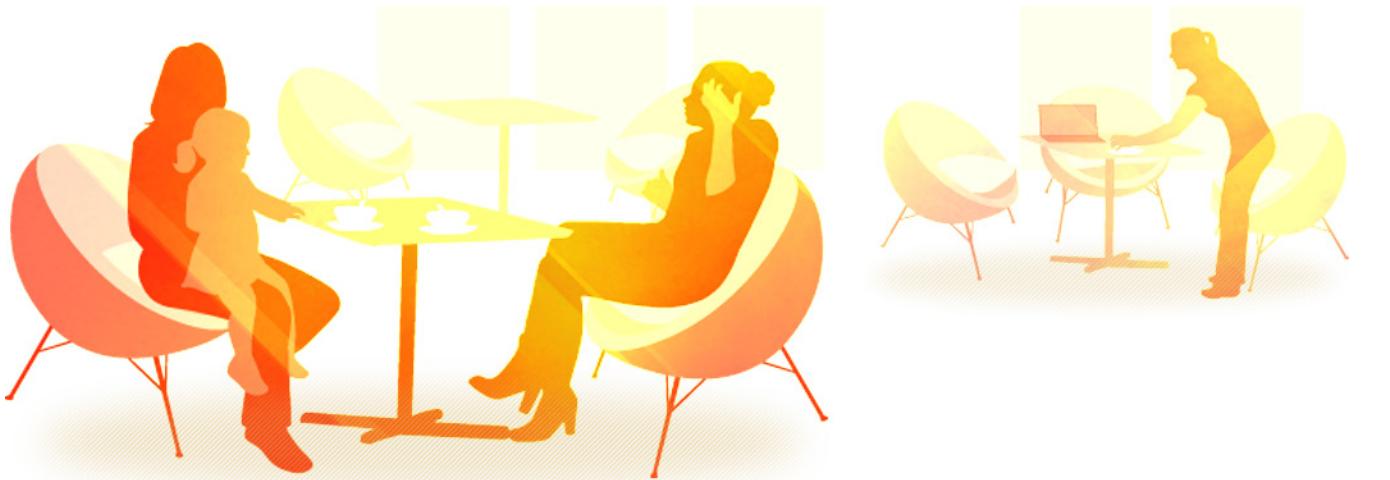
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EXECUTIVE SUMMARY



Moms are becoming more tech-savvy with each passing year, and digital technology is playing a greater role in influencing their purchase decisions.

Moms are using digital media to shop more quickly, more easily and with more information. And as we all know, anything that spells 'quick and easy' is likely to be popular with moms.

Moms are also using technology to connect with their friends, families, and others, for both information and social interaction. These activities are helping them to fulfill their needs as both moms and women.

With this in mind, many marketers will need to focus on developing more mom-relevant ways to influence purchase decisions within the digital eco-system. This will require marketers to shift from a traditional mass media mindset to more individuated digital activities in order to stay ahead of the game.

Here are some questions that marketers need to be asking if they intend to be effective in using digital technology to market to moms:

1 What digital technologies are moms currently using the most and how?

2 What trends will have the most affect on the way moms use digital media now and in the future?

3 What trends will have the most affect on how moms use digital channels to shop and make purchase decisions?

After answering the questions above, we can address the following:

What does this mean to me as a brand marketer who's trying to influence moms?

Knowing what I've learned, how can I improve the way I use digital to connect with moms, and ultimately generate brand awareness, trial, loyalty or advocacy?

If marketers had the answers to all these questions, they would undoubtedly be better equipped to develop effective digital strategies within their broader marketing communication plans. This foresight would also have a positive impact on budget planning and consequently their company's bottom line.

The purpose of this report is to demystify digital marketing issues for those marketers who are looking for more effective ways to interact with moms. It covers the current ways in which moms are using digital media and also provides a forecast of how they might be using digital media over the next three years.

This report also provides recommendations that can be factored into your marketing communications strategy in order to capitalize on moms' involvement with digital media, now and in the immediate future*.

KEY FINDINGS

Usage of digital technology is increasing

Moms are using digital technology more than ever before and they expect to increase their use of digital in the coming years.

Product Information & Price Comparison

Moms continue to depend on the internet as a tool for shopping; specifically for price comparisons, product reviews, and online purchasing. As the 2008-2009 recession increased consumer anxiety resulting in tighter household budgets, moms have increasingly turned to the internet in their search for better values.

Moms also anticipate they'll increase their usage of the internet for price comparisons and product reviews over next few years, even as the economy recovers.

Social Media

Like the rest of the country, moms have rushed to social media over the past few years in order to connect with their friends, family, and co-workers. And although the amount of time moms currently spend on social networking sites is significant, moms expect their social media activities to plateau over the next few years.

Marketers should be putting much more effort into inventing ways to activate word of mouth within social networking sites, and find new, more relevant, and appropriate ways to connect with moms. Display advertising and brand memberships/



personas alone are passé and insufficient tools for generating meaningful word-of-mouth.

Brands should also be focusing more on mom communities as opposed to general networking sites, because those mom communities are better tailored for mom-centric conversations.

Also, moms anticipate becoming more active in areas like photo and video sharing over the next few years. Increased interest in these activities could provide a springboard for brands where these activities are relevant.

Age and Digital Behavior

Moms exhibit different digital consumption behaviors depending on their age and the age of their children. Younger moms gravitate more towards social media, specifically as a communication platform, while older moms are heavier online shoppers, and are more involved with informational tools like news sites.

Furthermore, moms with children above the age of 12 are relatively more active with video games and podcasts, and cite a need to monitor their children as a primary reason for joining social networks.

Ultimately, moms tend to conform to the behaviors of parents of children their kids associate with, and so perhaps the age of the children is a better determinant of a mom's online behavior. In general, younger moms are raising younger children and older moms, older children.

Useful Segmentation

Segmentation of the mom market is becoming increasingly complex, nuanced, and sometimes counter-productive. Marketers have created personas like the 'Alpha Mom', 'Beta Mom', and 'Momshell' in an attempt to better hone their brand positioning and marketing messages. These narrow segments can sometimes result in unnecessarily alienating large groups of moms in the digital space.

Marketers should take a step back and put more focus on base demographics: the age of the mom and the age of their children, before creating nuanced segments based on lifestyle or attitudes. Marketers should also insure their marketing communication strategy doesn't unnecessarily alienate consumers within their target.

The Influence of Mom Bloggers

Mom bloggers have established themselves as online parenting authorities, and more and more moms are frequenting their sites to read their opinions on parenting, motherhood, womanhood, brands, and life in general.

Mom blogs can be a very effective marketing tool when used appropriately, because their readers value the blogger's opinions to the point where they have significant influence on purchase decisions.

Nonetheless, the credibility of mom bloggers' is increasingly being challenged as both brands and bloggers fumble through the issue of transparency. Sponsored content and gifts to bloggers have raised eyebrows amongst some moms, raising suspicion and diminishing trust.

Marketers need to be more prudent in the ways they engage mom bloggers, and closely monitor the reputation and practices of the bloggers they engage. A blogger's influence is proportionate to their integrity and trustworthiness, and brands can also take a hit if that integrity is diminished.

Brands also need to be prepared for criticism, maintaining a space that allows constructive feedback and conversation from the moms to the brand and vice versa. Moms appreciate brands that listen to them and take steps to address their grievances.

Brands have traditionally mitigated the risk of negative PR by not engaging consumers in a public dialog, or by responding to consumer grievances through 'official' press statements, if at all. This framework is insufficient as expression of consumer dissatisfaction is becoming part of the searchable public record.

Trends and their impact on Digital Marketing

Marketers need to make themselves aware of emerging trends that may affect the shopping habits of moms as well as their interaction with brands through digital media.

Economic Trends

Economists are projecting the economic recovery from the 2007-2009 recession to be slow and anemic, accompanied with high unemployment, slow job growth, restrictive credit, and higher taxes.

This recession is causing consumers, and for our purposes—moms, to be more mindful about their spending habits, and they are likely to stick to their new found thrifty values long after the recession is officially over. Moms will likely be saving more and spending less, searching harder for the best deals and consequently being less loyal to brands.

Moms will also be turning to digital media even more than they are now in order to satisfy their thriftiness using price comparison sites, online classifieds, barter networks, DIY instruction sites, digital coupons, etc. More moms may also see the internet as a money-making opportunity, in the form of a stay-at-home job or as their own online business.

Technology Trends

Technological advancements will also change the ways in which moms use digital media. Innovations surrounding increased mobility and augmented reality are going to be at the top of the list.

Smart phones are going to be cheaper and more advanced than they currently are, running on 4G communication networks supported by WiMax. We can also look forward to broader coverage, increased speed, and more efficiency.

Smaller devices such as Netbooks will continue to increase in popularity, taking share from both notebook and desktop computers. These smaller devices offer consumers more convenience at a lower cost through longer lasting batteries,

ubiquitous internet access, and cloud based applications.

We can also expect to see similar trends influencing the design of other devices: video cameras, still cameras, and audio devices. These devices will also begin to offer longer battery life, cloud-based storage and applications, and a convergence of features. For example, the new iPods include a camera.

Augmented reality and location-based tagging will also gain momentum, and moms will increasingly depend on this technology to provide value in their daily lives: shopping, dining, lodging, transportation, etc. Marketers who capitalize early on these opportunities will gain a competitive advantage over their competition.

Societal Trends

The 'green movement' will continue to influence the purchase behavior of moms over the coming years, but despite the fact that moms support the virtuous aspects eco-friendly products, it is important to recognize that price and value is much more important to them, especially in these challenging economic times. Moms are more interested in how green products and services will actually save them green.

WHAT DOES THIS MEAN TO MARKETERS?

1. As more consumers spend more time with digital channels and less time with traditional channels, marketers should be allocating more resources to digital.
2. Marketers need to focus on how their brands can provide relevance and value in the digital space. Moms are more interested in using digital for its utility rather than as a diversion.
3. Mobile will finally become an important channel for marketers. Brands should develop and maintain a comprehensive mobile strategy.
4. Mobile applications, location tagging, and augmented reality will pose opportunities and threats to brand marketers. Leaders in this space will gain a competitive advantage.
5. Brands need to continue to experiment and learn how to better engage moms in the social networking space.
6. As moms expect to use email more during the next few years, email will remain an important marketing communications channel for brand marketers.
7. Through digital media, moms will be even more price savvy and price conscious, and brands will need to make a more convincing value proposition.
8. Moms will be much more informed about products and swayed even more heavily by online reviews. This trend combined with mobile access could be critical at retail.
9. Moms will continue to seek discounts and coupons via digital media, and brands should be exploring new ways to use coupons as a gateway to other marketing activities.
10. Marketers should be doing more to proactively manage their brand's reputation in the digital space by actively participating on social media and review sites. Brands should respond directly to requests, criticism and questions in a timely, professional manner. This will pay big dividends over time.
11. Moms anticipated interest in producing and cataloging visual content may offer digital marketing opportunities for some brands.
12. Brands should look for opportunities to connect with moms by providing relevant educational content for children.

INTRODUCTION

There are differences in spending habits between moms and women without children. Moms typically shop with a priority for safety, quality and price, while women without children shop for quality, features and design.¹

Marketers who assume that strategies directed at "women" will automatically resonate with moms are mistaken. Once women become moms, their shopping needs change to account for their new role and responsibilities.

Moms are constantly bombarded with a myriad of tasks to accomplish in any given day. Between work, taking care of their families, and taking care of themselves, the responsibilities and skills of a typical mom translate into a \$122,732 salary.² Clearly, a mom's work is significant.

Fortunately, as technology continues to evolve, the ways in which moms are adapting to their multi-tasking role is evolving too. As with everything else, technology makes things easier, quicker and cheaper, and moms who are aboard the tech-train are benefiting from its value as both consumers and women.

Moms are a force to reckon with as consumers because they represent meaningful buying power. Women, of whom moms are a significant portion, are responsible for about 81% of household purchases, and about 60% of online shopping is done by moms.³

Since the essence of good marketing is providing relevance and value to the target market, marketers are faced with the challenge of knowing what moms want and how to give it to them.

The difference between the 21st century mom and her older counterparts is that she is tapping into digital technologies to help her gather information and advice from her peers. She uses technology to keep an eye out for bargains and products that provide good value.

Moms are also connecting with friends and family, and seeking entertainment and escape through digital media. Today's mom is searching for ways to be more efficient, effective and relaxed. As a consumer, any product or service that can help her achieve these goals will find itself winners.⁴

As we witness moms' increasing usage of digital technologies, it is evident this medium provides powerful tools for marketers. It is essential that marketers identify exactly how moms are using digital technology now and also forecast how she will be using it in the future. By doing so, marketers will gain a better understanding of the digital marketing elements they need to focus on in order to design strategies that will help them gain market share with moms.



¹http://www.babycentersolutions.com/research_studies.php | ²<http://www.inc.com/news/articles/2009/05/mom-in-chief.html> | ³<http://74.125.95.132/search?q=cache:dgPumd8sxUJU:marluckymarketing.com/a/marketing-moms.pdf+quick+and+easy+ways+to+market+to+the+powerful+multi-billion+dollar+market+of+mothers+online&cd=1&hl=en&ct=clnk&gl=us> | ⁴<http://www.momcentralconsulting.com/>

"Any mother could perform the jobs of several air-traffic controllers at once with ease."

- Lisa Alther

The following section of this report provides information on moms' current and future use of digital technologies in the next 1-3 years and the issues marketers need to be thinking about in order to turn moms into customers.

Section I

Moms' Current Use of Digital Media

- Understand the complexities in segmenting the mom market
- Discover how the age of the mom and the age of their children affect their type and level of digital media consumption
- Learn how moms are employing the different channels of digital media and why (i.e. which medium they use at the different stages of the purchasing process)
- Understand the significance of Mom Bloggers to marketers and the concerns being raised by consumers and consumer advocates

Section II

Moms' Future Use of Digital Media

- Determine how economic, technological and social trends will ultimately influence the depth, frequency and manner of moms' use of digital technologies over the next 3 years
- Understand what these changes mean for marketers, and how traditional marketing will be affected by mom's increasing use of digital technologies

Section III

Potential Marketing Strategies to Target Moms for the Next 1-3 Years

- Determine which aspects of digital technology marketers need to focus on to reach and influence purchases made by moms
- Identify the digital activities moms' anticipate using more in the next 3 years

Understanding that moms are influential customers who are no longer digital technology rookies is just a start. The challenge marketers' face is designing digital marketing strategies for moms that offer:

Convenience

Digital applications and activities must be accessible, quick and easy to use

Relevance

Marketers should focus on helping moms to execute their motherly duties: work inside and outside the home, maintain their personal relationships, raise their children, and last but not least, take care of themselves.

Value

Digital marketing can help moms save time and money or provide tools that help them create, communicate, collaborate, entertain, and shop.

Differentiation

Marketers who offer digital marketing activities that stand apart from the crowd will gain more opportunities to connect with moms.

MOMS' CURRENT USE OF DIGITAL MEDIA

Many brand marketers and their agencies already feel they know what moms want and are competently engaging them through digital media.

According to a survey by M2Moms, regardless of the fact that many marketers are spending millions to connect with moms, 60% of moms believe that their needs are ignored by marketers while 73% opine that marketers do not fully know what it means to be a mom.⁵

Unfortunately, this survey shows that over half of moms surveyed do not find current marketing and advertising directed at them effective.

Moms feel that even though marketers direct messages at them, marketers are not being receptive to their responses and are consequently not doing much to address their needs.

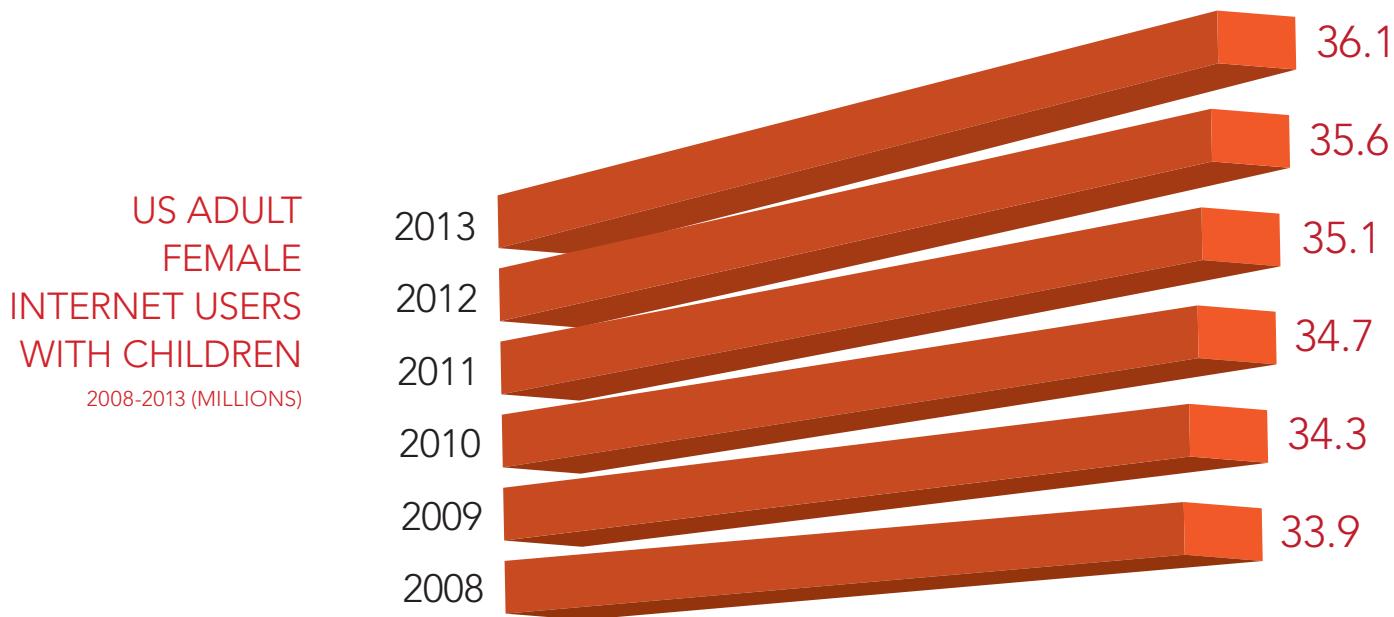
This is not to say that all marketers are missing the mark, but it is to say that only a small number of marketers are satisfying moms with their current marketing techniques.

Marketers should take time to gain a deeper understanding of moms in order to avoid wasting resources on irrelevant and ineffective marketing activities.

MOMS and DIGITAL CONSUMPTION

The rate at which moms are using digital technology is steadily rising. Moms represent a huge portion of current online activity. As of June, 2009, 34 million moms were going online at least once a month.⁶ Based on past figures, this number is expected to keep increasing over the next few years showing that more and more moms will be embracing digital media as the years go by.

Moms are also using technologies beyond the internet. In a two-part report by Razorfish and Café Mom titled Digital Mom, concluded that a majority of tech-savvy moms are using social networks, text messaging, instant messaging, gaming, e-mail, search engines and news sites. Viewing online videos, reading online consumer reviews, blogs and

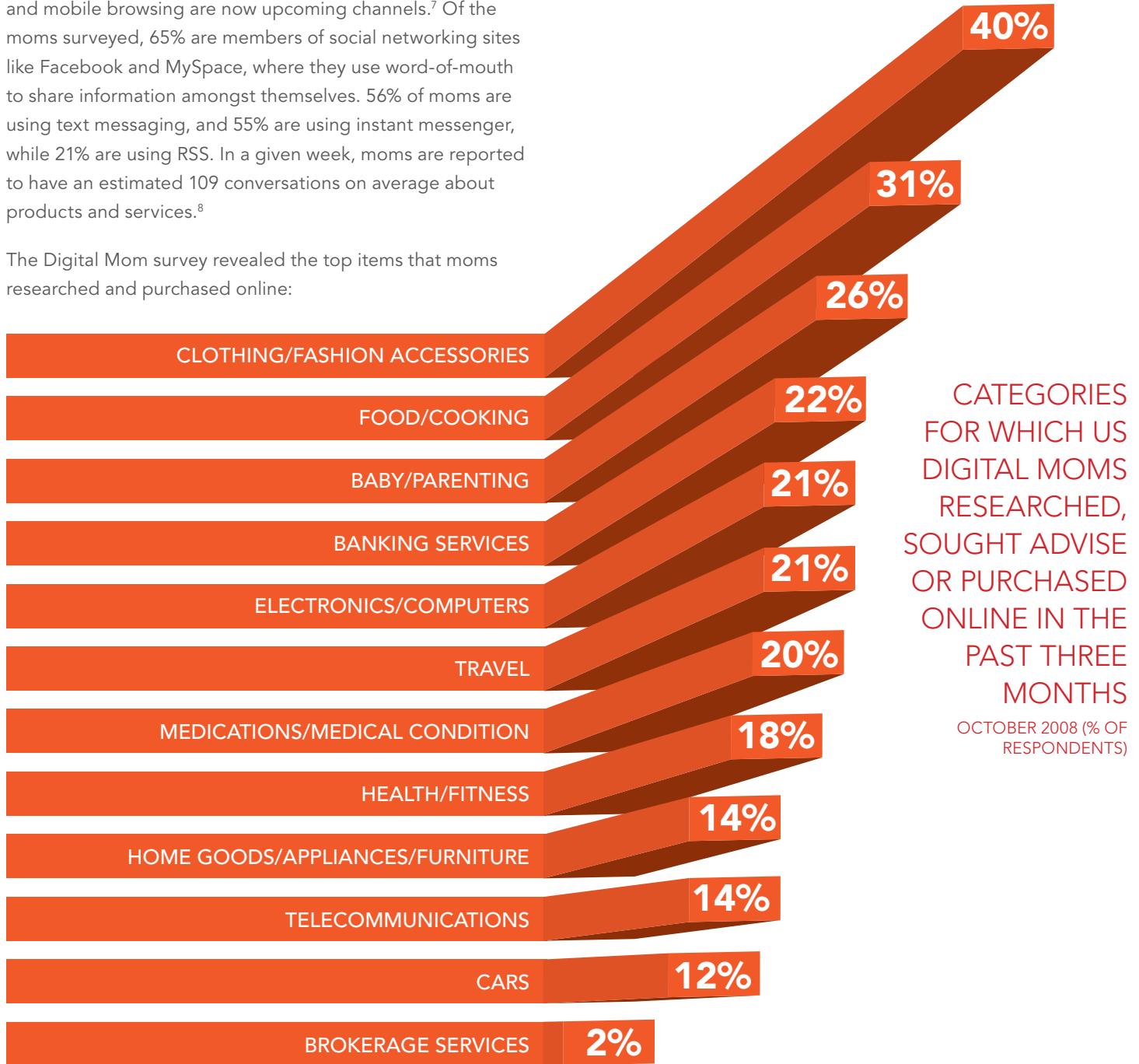


NOTE: AGES 18+ WITH CHILDREN UNDER 18 IN HOUSEHOLD
SOURCE: eMARKETER, MAY 2009

⁵http://www.brandweek.com/bw/content_display/esearch/e319813ed99c5e2b4f35d6f549572d82513?pn=1 | ⁶http://www.emarketer.com/Article.aspx?R=100711&Ntt=moms&No=0&xsrc=article_head_sitesearchx&N=0&Ntk=basic

using DVR are also mainstream activities. RSS, podcasting and mobile browsing are now upcoming channels.⁷ Of the moms surveyed, 65% are members of social networking sites like Facebook and MySpace, where they use word-of-mouth to share information amongst themselves. 56% of moms are using text messaging, and 55% are using instant messenger, while 21% are using RSS. In a given week, moms are reported to have an estimated 109 conversations on average about products and services.⁸

The Digital Mom survey revealed the top items that moms researched and purchased online:



Although television is the leading medium through which moms become aware of a product, it is closely followed by other channels like referrals from friends and family, general websites, and emails.

⁷<http://digitalmom.razorfish.com/publication/?m=4248&l=1> | ⁸<http://www.tech-em.com/features/marketing+digital+mom>

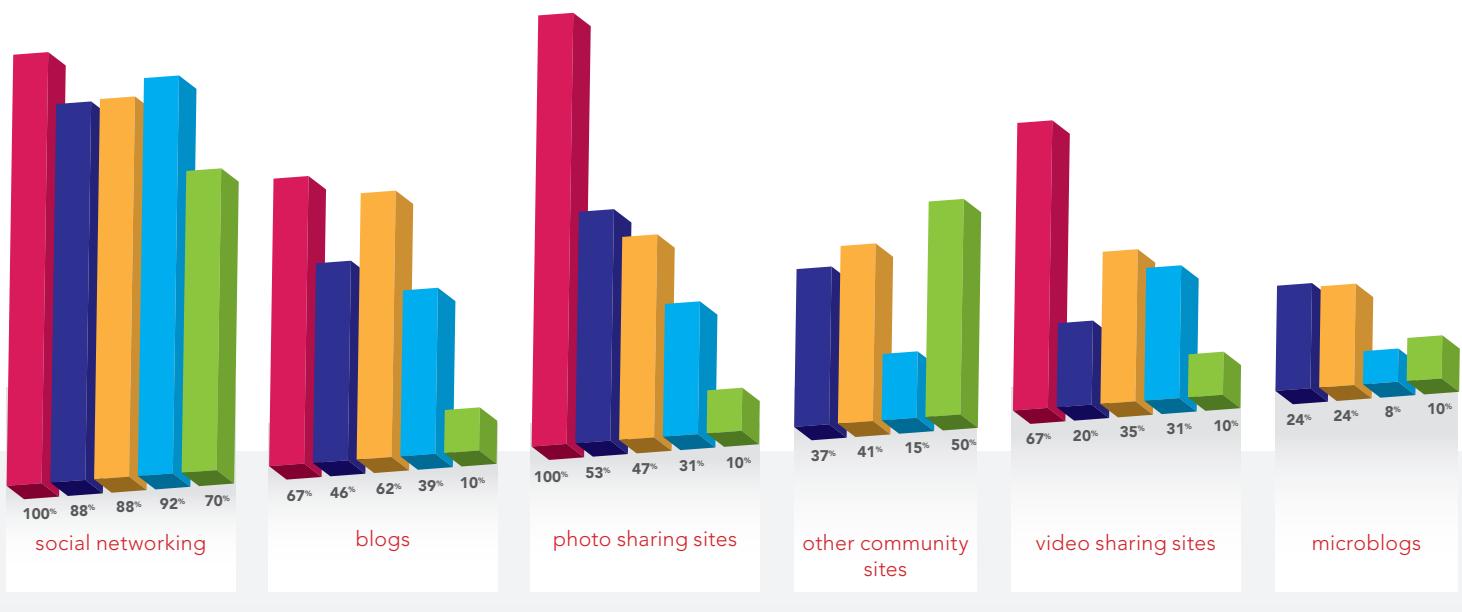
Other media like magazines, podcasts, search engines, mobile web browsing, radio and social media are somewhat important, while newspapers, text messaging and online video are least effective.

During the learning and researching stage of the purchasing process, online communication channels like search, websites, referrals from friends/family, and other social media have the highest number of moms using them. Traditional media does not have as much impact on this stage with the exception of magazines.

In the final stage of the purchasing process, websites, referrals from friends and search engines are the most influential on moms. Mobile browsing is also influential in this stage even though it is not as highly used at this point in time.⁹

ONLINE SOCIAL ACTIVITY OF MOMS WITH CHILDREN 18 OR UNDER

QUESTION:
WHEN ONLINE, DO YOU READ, WATCH AND/OR COMMENT ON?
(CHECK ALL THAT APPLY)



SOURCE: INFUZ ONLINE SURVEY, CONDUCTED AUGUST 2009.
MOMS WITH CHILDREN 18 OR UNDER.



⁹<http://digitalmom.razorfish.com/publication/?m=4248&l=1>

ONLINE SOCIAL ACTIVITY OF MOMS WITH CHILDREN 18 OR UNDER

QUESTION:
WHICH OF THESE DO YOU CURRENTLY DO?
(CHECK ALL THAT APPLY)

social networking

share photos

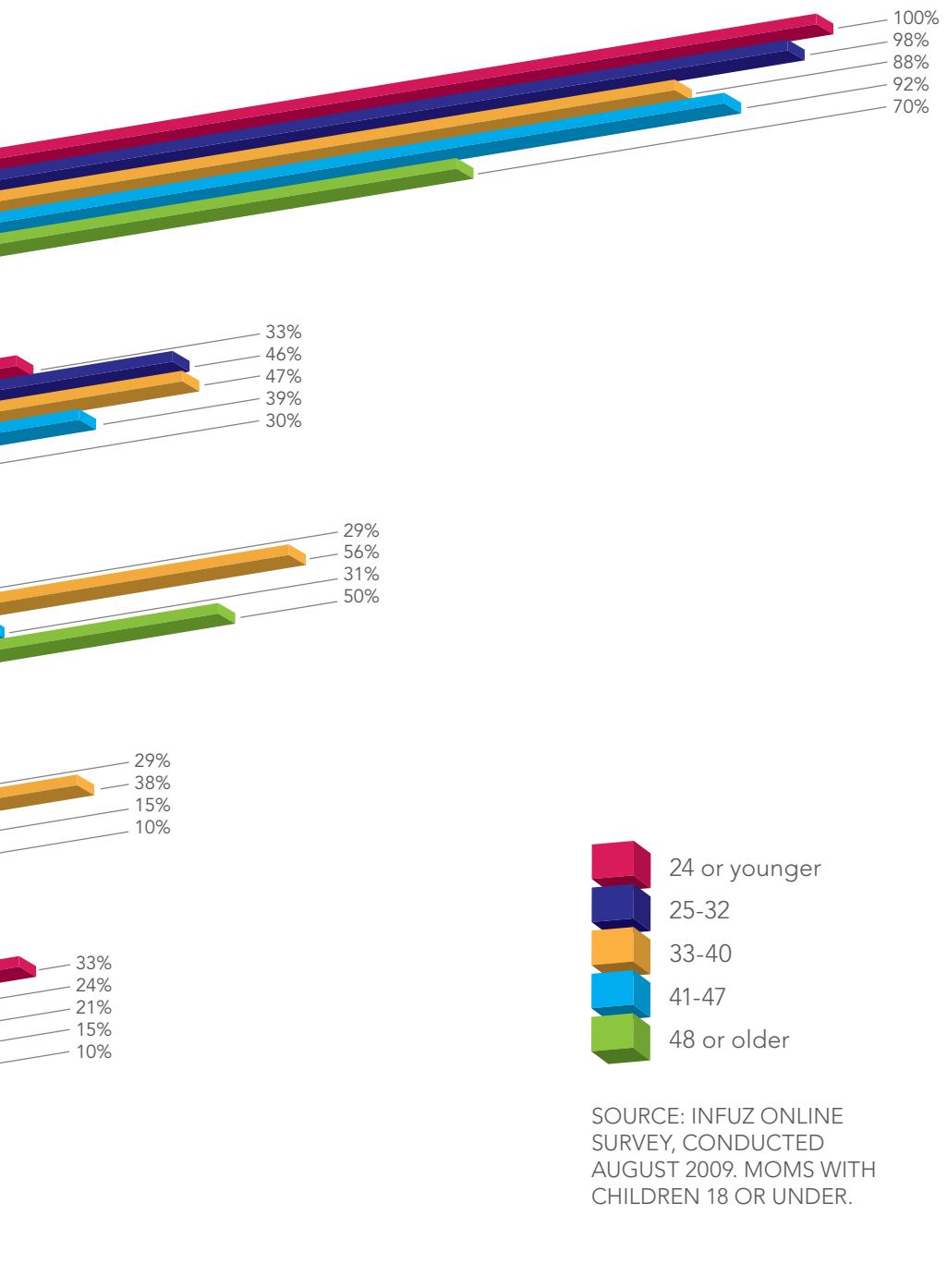
participate in other community sites

blog

microblog

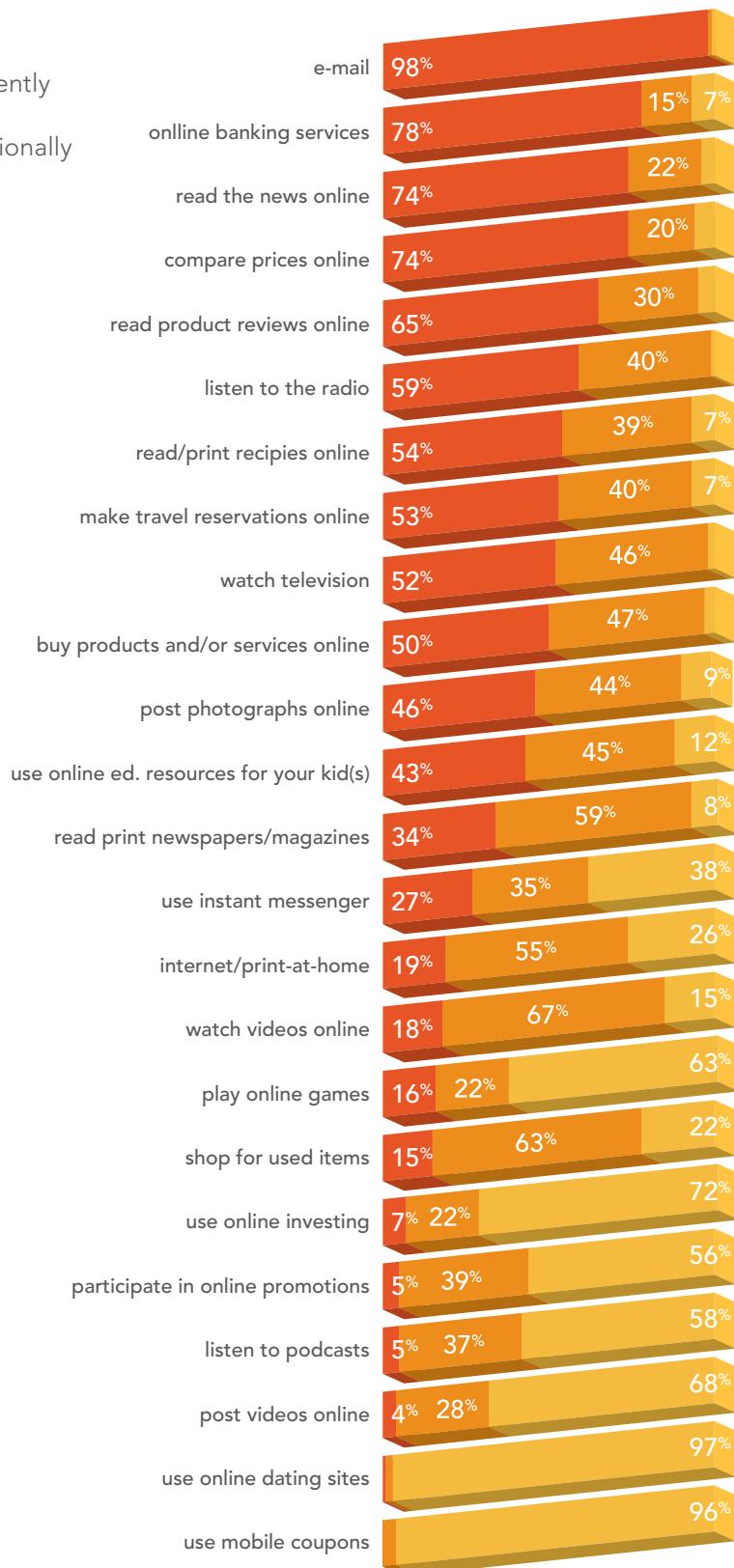
share videos

14



SOURCE: INFUZ ONLINE SURVEY, CONDUCTED AUGUST 2009. MOMS WITH CHILDREN 18 OR UNDER.

CURRENT MEDIA PARTICIPATION AND CONSUMPTION



SOURCE: INFUZ ONLINE SURVEY, CONDUCTED AUGUST 2009. MOMS WITH CHILDREN 18 OR UNDER.

MOMMY WARS: SEGMENTING THE MOM MARKET

GEN X vs. GEN Y

All moms are not created equal. Gen X and Gen Y moms have different parenting styles and even different ways of using digital technologies. As of last year, there were approximately 9 million Gen Y moms in America and this demographic has been identified as having more children at a relatively younger age.

Gen Y moms are more relaxed about parenting than Gen X moms and they do not feel the urge to conform to societal norms, and are instead clinging to individuality and self expression. They are also very reliant on their mom friends for advice on parenting and household issues. In terms of marketing, they do not expect marketing to be a one-sided conversation from the brand; they expect an interaction that calls for their involvement.¹⁰

Generational differences also affect how moms use the same digital channels of digital media as well as the frequency with which they use them. To help clarify which mediums were being used the most by the different generations of moms, Nielson conducted research on moms and their internet use.

They segmented moms into two groups—'Newbies' and 'Established Moms'. Newbies were defined as moms between the ages of 25 and 34, with one or more child. Moms within this age bracket are relatively more engaged in social media. Established moms on the other hand, were moms between the ages of 40 and 50 with 3 or more children. They were found to use the internet for more task-oriented activities like online shopping and searches promotions/bargains. Nonetheless, Established Moms are one of the fastest growing demographics on Facebook.¹¹

Moms younger than 35, are also active users of SMS, mobile browsing, and social media. And moms over 45 are active users of news sites, podcasts and online consumer reviews. Moms between age 35 and 44 are more likely to use DVRs, and those above 45 are more likely to play video games than those within the 35-44 bracket.¹²

When segmented according to the age of their children, it was apparent that moms who had children 12 years and older were more likely to watch videos online, play video games, read online customer reviews, and watch/listen to podcasts. Moms who had children under 12 were more likely to be members of a social network.

Power Moms' Online Behavior

Top Visited Sites Among Females, 40-50 Household Size: 3-4

Shopzilla.com Network	192
Target	160
Walmart Stores	155
Glam Media	147
Amazon	135
AOL Instant Messenger	129
AOL Media Network	122
Wikipedia	121
Yahoo! Mail	117
eBay	116
Facebook	114
Myspace.com	112

Top Visited Sites Among Females, 25-35 Household Size: 1-2

Target	276
Craigslist	253
Blogger	227
Walmart Stores	190
Amazon	187
Facebook	185
Wikipedia	184
eBay	178
Yahoo! Mail	162
Myspace.com	160
YouTube	142
AOL Media Network	140

SOURCE: NIELSEN ONLINE @PLAN, WINTER 2008 *Power Mom: a mom between the ages of 25 and 50 who uses digital technology.

¹⁰http://www.brandweek.com/bw/content_display/esearch/e31bbfaf7a505146051dd14dd93925df26 | ¹¹http://www.bizreport.com/2009/05/nielsen_mommy_blogger_power_grows_1.html | ¹²<http://digitalmom.razorfish.com/publication/?m=4248&l=1>

In general, the age of the mom's children affects the kind of life-stage content she consumes online, according to the Digital Mom report. Examples of such life-stage content are baby and parenting, medication and medical condition, computers and electronics, and cars and telecommunications. The consumption habits of mothers will change as their children age.¹³ It is problematic to use the mother's age as the only factor when analyzing their digital media usage habits.

Studies reveal that moms will in fact adopt social and media behaviors from moms of their children's friends regardless of how old they themselves are.¹⁴ This certainly grants more validity to the fact that the child's age may be the most important factor in determining which channels tech-savvy moms will use the most.

SEGMENTATION BY ATTITUDES AND LIFESTYLES

Aside from segmenting the mom market by age, some marketers have attempted to segment by attitude and lifestyle traits, creating personas that represent those traits. Thus, the 'Alpha' and 'Beta' moms were born.

The most popular and broadest definition of an 'Alpha Mom' was given in USA Today by Bruce Horvitz. This marketing term characterizes women who are "educated, tech-savvy, Type A moms with a common goal: mommy excellence. She is a multitasker. She is kidcentric. She is hands-on. She may or may not work outside the home but in the home she views motherhood as a job that can be mastered with diligent research." She is the go-to person on a variety of issues pertaining to women and moms because of her constant thirst for information, and she revels in being the leader of the pack.¹⁵ Other, more specific definitions imply that besides the multitasking and hands-on qualities possessed by 'Alpha Moms', these moms are also fashion conscious and take time to groom themselves.¹⁶ This fashionable trait of 'Alpha Moms' has evolved to have a life of its own in the term 'Momshell'.

The term 'Momshell' is a fusion of the words 'mom' and 'bombshell'. Some view this new term as a positive. After all, moms can be attentive to their physical appearance despite the fact that they're tasked with taking care of the children.

On the flip side, some people are beginning to wonder if this term is just another symbol for the many pressures exerted on women. Both the negative and positive connotations of these terms seem to be fostered mainly by a competitive streak amongst moms.¹⁷

Beta Moms, as you may expect, are the opposite of 'Alpha Moms'. They're often confronted with raised eyebrows at their parenting techniques, simply because they go against the highly marketized 'Alpha Mom' hyper-parenting stereotype. They do not strive to be over-achievers or to bring their corporate mind-sets into the home. They are generally more laid-back and feel they do not have to do everything flawlessly, even though they may feel the societal pressures to be perfect. They are more concerned about giving their children the opportunity to explore life for themselves and embrace the ups and downs in its totality.¹⁸ Many Beta Moms fall under the Gen Y demographic.

Sociologists affirm that there is really no right or wrong way to parent; it is an individual choice. Studies reveal that moms usually strive to be 'Alpha Moms' with their first child because it is unfamiliar territory and they don't see any room for mistakes. But with the onset of child #2 and the siblings that follow, the 'Beta' or 'Slacker Mom' attitude may emerge, as she grows more comfortable with motherhood and doesn't view child-rearing as a work project.¹⁹

|| WHAT DOES THIS MEAN TO MARKETERS?

It is essential that we understand that the 'Alpha Mom' is not an actual person; she is a persona created by marketers to sell products. There is a general misconception that if marketers can market successfully to 'Alpha Moms' and build brand loyalty with them, they will become effective influencers, mobilizing 'Beta Moms' to follow. In recent years, many moms are admitting that they act more like 'Beta Moms' than 'Alpha Moms', whom they increasingly view as unrealistic and over-bearing.

¹³Ibid | ¹⁴http://books.google.com/books?id=AT1JQR1RON0C&dq=beta+mom+marketing&printsec=frontcover&source=in&hl=en&ei=U1GESzncXwsgPbxM2TBw&sa=X&oi=book_result&ct=result&resnum=11#v=onepage&q=&f=false | ¹⁵http://blogs.usatoday.com/ondedeadline/2007/03/first_soccer_mo.html | ¹⁶<http://mommyiamhome.blogspot.com/2009/08/alpha-mom.html> | ¹⁷<http://www.parentdish.com/2009/03/26/are-you-a-momshell/> | ¹⁸http://www.usatoday.com/news/health/2007-05-08-alpha-beta-moms_N.htm | ¹⁹Ibid



Marketers should determine how they want to segment using these mom personas, either by finding common ground between them, or actually selecting a single mom persona they want to appeal to.²⁰

The Digital Mom survey concluded that there are some interests that moms share irrespective of their unique qualities and situations, their age, or age or their children. These interests in are in lifestyle content and they surround health and fitness, fashion and clothing, travel, and food and cooking.²¹

MOM BLOGGERS

Another opportunity for marketers is the growth of Mom bloggers, who write about their parenting experiences as well as their views on other issues moms may be interested in. Mom Blogging and mom communities are extremely popular – over 10,000 moms start a new blog every day.²²

Mom blogs are increasingly being viewed as viable marketing communications tool because bloggers often discuss the products they use, creating potential for word-of-mouth advocacy. The following statistics demonstrate the importance of 'mommy bloggers' as a means for encouraging other moms to try products based on their reviews.²³

- Over 78% of Mom Bloggers now review products and services
- 96% of moms value recommendations they find on Mom Blogs
- 94% of Moms rely on other moms to make purchasing decisions
- More than 60% of Mom Bloggers consider making money important and want more connectivity with companies
- 37% of Mom Bloggers have been contacted as resources for the press

The partnership between brands and mom bloggers is one that can be mutually beneficial, but potentially dangerous. Brands can use mom blogs to generate awareness through

²⁰<http://www.bsmmedia.com/about/news/ohmother.php> | ²¹<http://digitalmom.razorfish.com/publication/?m=4248&l=1> | ²²http://www.brandweek.com/bw/content_display/esearch/e31bbfa7a505146051dd14dd93925df26 | ²³<http://www.adotas.com/2008/10/moms-bloggers-may-be-key-to-marketing-success/>

display ads, sponsored content, or product reviews/mentions. Moms often receive free products or special access to try out certain products. In the case of advertising, bloggers are compensated with revenue.²⁴

The process marketers use in connecting with mom bloggers should be thoughtfully considered. Marketers should carefully evaluate the mom bloggers they hope to partner with in order to validate their following, credibility, and policies. But once marketers have taken the time to assess potential partners, it is essential that they approach them in an appropriate manner. Here are some useful tips on how to approach mom bloggers²⁵:

- Send a friendly, personalized email. Do not contact bloggers via mass emails or form letters
- Ask permission to send a sample of your product or free trial of your service. Do not send products unsolicited!
- Offer bloggers something they can give away to their readers
- Be accessible to answer questions
- Be cordial even when you get a bad review. It's ok to politely comment on and defend your product (politely!). But it's even better to take their criticism to heart and make your product or service better.

Legitimacy of Sponsored Content

'Blog-ola' is a slang term used to describe the act of bribing or paying influential bloggers to promote a specific product or service. Recently, the issue of 'blog-ola' has been raised relative to mom bloggers and the sponsored content they produce for marketers, raising doubts about their credibility.²⁶ Critics are concerned that many mom bloggers may not be giving genuine reviews because of the compensation they receive.

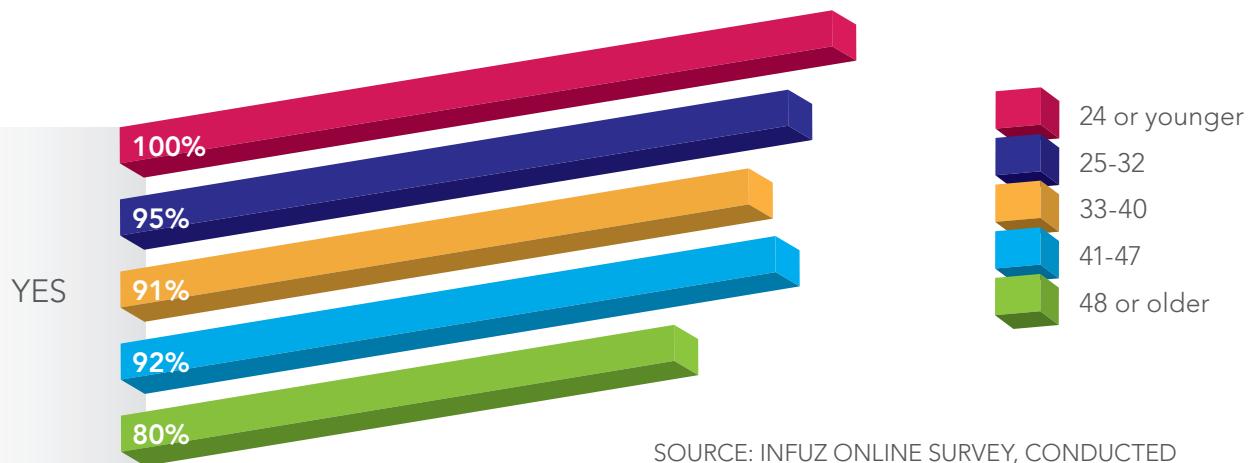
Enter BWI, Blogging With Integrity, a group of mom bloggers who are collectively building a movement with the pledge to disclose all "material relationships, policies and business practices," and identifying what content on their blogs is editorial, advertorial, or advertising. Member bloggers can display the badge of BWI on their website to signify their pledge of full disclosure.²⁷ BWI is an important step for those bloggers and brands who want to maintain their authenticity and legitimacy.

Both marketers and mom bloggers should keep the issue of 'blog-ola' in mind by taking steps to reassure followers that the information and reviews they are reading is truthful. These steps may help strengthen the brand-blogger-mom relationship and facilitate a transparent dialog about products.

SOCIAL NETWORK ACTIVITY OF MOMS WITH CHILDREN 18 OR UNDER

QUESTION:

HAVE YOU JOINED A SOCIAL NETWORK
(i.e. FACEBOOK, LINKEDIN) IN THE PAST TWO YEARS?



SOURCE: INFUZ ONLINE SURVEY, CONDUCTED AUGUST 2009. MOMS WITH CHILDREN 18 OR UNDER.

²⁴http://www.nytimes.com/2008/08/14/technology/14women.html?_r=2&oref=slogin | ²⁵<http://blog.searchenginewatch.com/081017-112939> | ²⁶<http://www.npr.org/templates/story/story.php?storyId=111083779> | ²⁷http://www.forbes.com/2009/07/27/good-blogging-seal-of-approval-technology-paidcontent.html?partner=whiteglove_google

Do Not Underestimate the Mom Blogger

It would be unwise to question the influence mom bloggers have, or underestimate the amount of power they carry on the internet. An example is the Motrin Mom backlash which occurred when Motrin placed an online video on their website insinuating that 'baby wearing' is merely a fashion statement, depicting these moms as insensible. Many online moms were outraged and "Motrin" was soon a trending topic on Twitter, as videos were posted on YouTube and commented on by indignant mothers.

Search engines also saw a boost in searches for 'Motrin' and mom bloggers encouraged their readers to boycott Motrin products. Eventually, the ad was removed from the website and other media that were circulating it, and Motrin authorities made a public apology for offending moms with their advertisement.²⁸

MOMS and SOCIAL MEDIA

Over the past few years social media has become very popular among online moms. Their use of social networks is up by 462% since 2006 and the most used channel of social media is blogs.²⁹ New moms are 85% more likely to visit Facebook than the average web user and over twice as likely to visit bloggers.³⁰ Mobile web browsing has also increased by 348% since 2006.³¹

There are many channels of social media, but brands have struggled with using it successfully as a marketing tool. Many brands have created member pages, used display advertising, or created widgets, but these tactics have not been wildly successful.

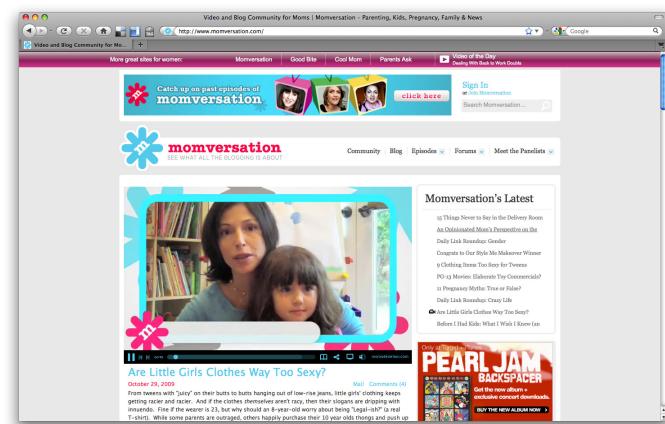
Nonetheless, not all attempts have been futile. It is evident that marketers who use social media as a communication platform where interaction is fostered between the brand and the mom have seen some success.

Moms are typically interested in joining two kinds of social networks —mom-specific communities and general social communities like Facebook. These two community-types have different environments and marketers should insure their

activities and messages are relevant to the environment. Moms are much more receptive to talk about mom topics in mom-specific communities than they are on general social sites.³²

Momversation

A good example of how social media can be used to engage moms appropriately is the 'Momversation' campaign developed by Deca and Target. The Digital Entertainment Company of America (Deca) partnered with Target, the exclusive sponsor in late 2008 and launched Momversation.com³³, a website hosting an online video show of a group of some of the most popular and influential mom bloggers. Momversation is a show for moms by moms where guest mom bloggers discuss womanhood and motherhood through video stories. The show introduces an interactive element through the Momversation Forum , a property which allows the online viewers to join in and extend the conversation. The videos are distributed through an array of online channels like blog outreach, mom blogger sites, and Yahoo Shine.³⁴



SOURCE: MOMVERSATION.COM

²⁸<http://parenting.blogs.nytimes.com/2008/11/17/moms-and-motrin/> | ²⁹<http://www.lotame.com/blog/your-momma-uses-social-media/> | ³⁰www.nielsen-online.com/pr/pr_090507_3.pdf | ³¹http://www.babycentersolutions.com/research_studies.php | ³²http://www.mediaweek.com/mw/content_display/esearch/e3ied6fab86168c1a15060358a574c50ac | ³³<http://www.momversation.com/> | ³⁴<http://www.appvita.com/2009/05/08/momversation-interact-with-mommy-bloggers-become-a-smarter-parent/>

MOMS' FUTURE USE OF DIGITAL MEDIA

Forecasting consumer behavior is always difficult, but those who pursue a reasoned approach can gain a strategic advantage over their competitors.

In order to forecast the digital behavior of moms over the next few years, we focused on analyzing trends that are likely to influence their purchasing decisions and use of digital media. The primary trends we examined cover economic, technological and social developments.

ECONOMIC TRENDS

Most households and businesses have been impacted by the recession that began in the United States in late 2007. American households have seen the loss of approximately \$14 trillion in wealth, which is a higher amount than they gathered in their collective earnings from all sources of income in 2008.

Americans faced this downturn after a period of high consumption, high debt, and low savings rates. This was also a period where the majority of the baby boomers were reaching retirement age. Much like past recessions, it was no surprise to see Americans rapidly changing their consumption habits, increasing their savings, and cutting back on spending in order to ride the recession out.

Still, experts admit their recovery projections are cloudy. The aftermath of the housing bubble we just experienced is unprecedented and its long term effects cannot be accurately forecasted.

While economists are debating amongst themselves on the intensity of the wealth shock, most of them agree that consumers will continue to spend less and save more even

when economy is deemed to be in full recovery. Economists predict that the recovery will be difficult and gradual.³⁵

According to some economists, the unemployment rate will crest at 9.8% and the jobless rate will keep going up for a few more quarters. Businesses are going to be dealing with tight budgets and it is likely their hiring activities restrained. These economists also predict that the Federal Reserve will maintain short term interest rates at near zero.³⁶

The Organisation for Economic Co-operation and Development (OECD) affirms these forecasts with similar estimates, and in general, expects Real GDP to go from -1.7% in 2009 to 1.5% by the end of 2010. They also anticipate inflation increasing by .6% at the end of 2010. This inflation may be fueled by the Fed's monetary expansion policies and increased government spending.³⁷

Since moms make up a significant portion of the American consumer at 82.5 million strong³⁸, it is no surprise that their spending habits have been greatly affected by the recession. In fact, it is plausible that moms are using digital media even more in their quest to find more information about products before making a purchase. Moms want to make sure that they are buying the best value, be it detergent or automobiles. They are relying ever more on product reviews because they cannot afford the trial and error process on tight budgets and would rather invest in products that are tried, tested and proven.

Moms are more drawn to sales, promotions and bargains because they are looking for ways to cut back and save on a few bucks. All this because they have less money in their pockets and, therefore, want to ensure that they are gaining the most value and satisfaction from their purchases.

The recession has made moms more frugal and conscientious about their shopping experience and they are likely to stick to this new found frugality even as the economy improves. In general, the recession has caused Americans to use the web more for a variety of tasks.³⁹

³⁵http://www.nytimes.com/2009/08/03/business/03econ.html?_r=2&ref=economy | ³⁶http://www.usatoday.com/money/economy/2009-04-26-economy-survey_N.htm | ³⁷<http://www.investmentnews.com/article/20090322/REG/303229974> | ³⁸http://www.census.gov/Press-Release/www/releases/archives/facts_for_features_special_editions/004109.html | ³⁹<http://www.google.com/hostednews/afp/article/ALeqM5i3DtXKoBjclgkZjoOBccqjcKH5A?index=0>

- 52% looking for information on the economy
- 41% information on jobs
- 40% online coupons
- 27% pointers on money-making strategies
- 25% information about managing finances
- 23% used auction sites or classifieds

We predict that moms will continue using and increase their interest and frequency of using price comparison sites, online classifieds, online auctions, online coupons and freebie sites. There may also be an increased interest in Do-It-Yourself (DIY) options for things like auto repair, home maintenance, gardening etc. Marketers should consider taking advantage of these trends by offering more DIYer content via digital media.

We also anticipate a possible increase in barter trading, especially via digital technology. Barter networks may sprout up, especially in the event that taxes or inflation rise substantially. The consumer price index is expected to rise to 1.8% by the first quarter in 2010 from 1.3% at the end of 2009 and plateau at 1.9% in the second and third quarter of 2010.⁴⁰ Most economists expect inflation to stay in check in the next few years, but given the explosion in government deficits, higher taxes are a likely scenario.

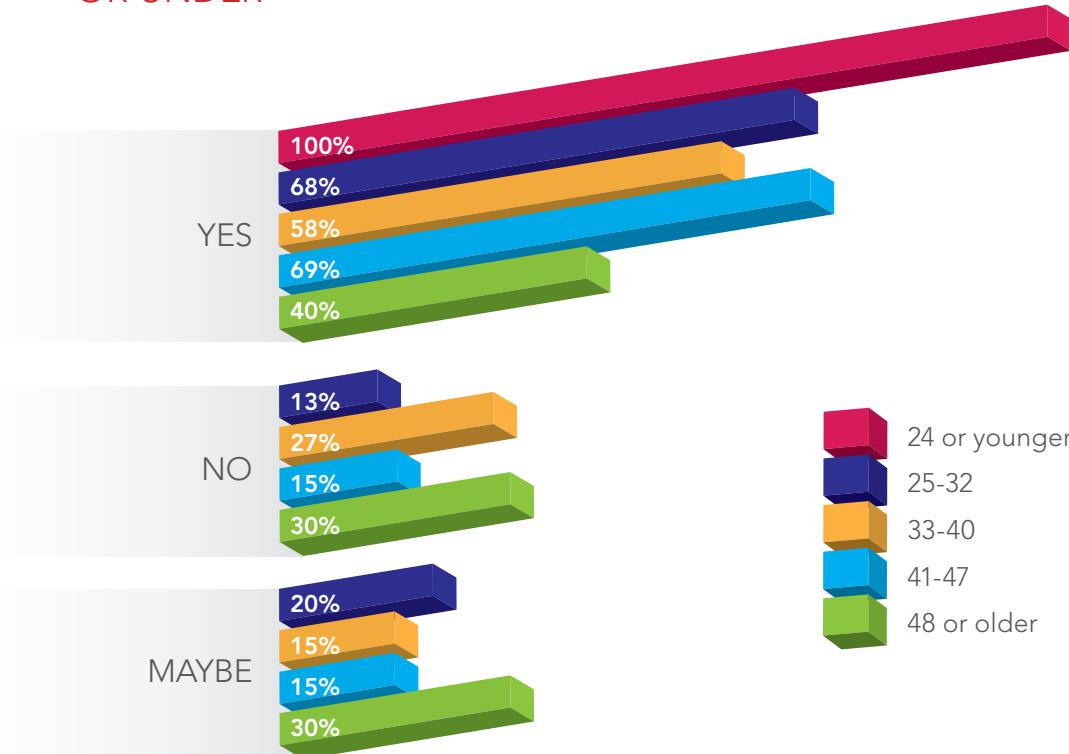
Moms may also be drawn to opportunities to make money online, via promotions, get-rich-quick opportunities, or online gaming/gambling. We may also see moms look for additional opportunities for income while they're at home via home-based internet business. This entrepreneurship may be driven by moms who plan to work longer and retire later — if they ever do retire.



⁴⁰http://www.usatoday.com/money/economy/2009-04-26-economy-survey_N.htm

MOBILE WEB USAGE OF MOMS WITH CHILDREN 18 OR UNDER

QUESTION:

DO YOU PLAN ON OWNING A
SMARTPHONE IN THE NEXT 1-3 YEARS?

SOURCE: INFUZ ONLINE SURVEY, CONDUCTED AUGUST 2009. MOMS WITH CHILDREN 18 OR UNDER.

TECHNOLOGICAL TRENDS

There are several technological trends that may affect the way moms interact with digital media and ultimately, how companies position their digital marketing activities. The most prominent are trends are mobility and virtualization.

Mobility

Technology is advancing rapidly towards the age of mobility; everything needs to be mobile these days. Notebooks outsold desktops last year according to iSuppli⁴¹ and now there are netbooks which are even smaller than notebooks - some have been described as large smartphones. More people are

expected to adopt netbooks and notebooks over the next few years, and moms need not be the exception. These high-powered notebooks and netbooks will have longer lasting lithium batteries and faster data processors with flash drives of a higher speed, which will make them more efficient and easier to use.⁴²

4G communication which runs on WiMax is expected to explode in the next couple of years as more devices are created that support it and more networks plug-ins are available. 4G communications is simply more powerful and faster than 3G; while WiMax is a wireless data system like Wi-Fi but broadcasts to a much wider range. This technology will give us networks performing at a 40Mbit/sec, with a download speed that is three times faster than 3G.⁴³

⁴¹http://www.computerworld.com/s/article/9124285/Notebook PCs outsell desktops for first time | http://www.computerworld.com/s/article/9127152/Mobile_tech_2010_Five_trends_that_will_change_our_lives?taxonomylid=15&pageNumber=1 | ⁴²http://www.computerworld.com/s/article/9116844/Sprint_s_4G_Xohm_WiMax_How_fast_is_it/?taxonomylid=15&pageNumber=2

These technological advancements are bound to affect the quality and quantity of the time moms will be spending in the digital eco-system. With moms using netbooks and mobile devices more frequently, their online activity and interaction with digital media will increase, because they will find it quicker and more useful. 4G on WiMax will allow moms to access mobile web browsing in more places and at a faster speed. In a nutshell, more moms will be turning to digital media to shop and connect with their social networks because of these advancements.

We also anticipate greater demand for mobile phone applications as moms increasingly use their smartphones on the go to access information, shop and connect with friends and family.

The popularity of the iPhone has already compelled brands like Unilever, Whole Foods and Pizza Hut to create user-friendly applications in an attempt to make digital purchasing quick, easier and fun. As more moms opt for smartphones over standard mobile phones, marketers should thoroughly consider developing a mobile strategy that provides moms with immediacy of interaction and value. Marketers who are derelict in pursuing mobile strategies will invariably be making their brand less accessible and therefore less relevant to moms.

In terms of connecting with friends, Juniper Research reports that by 2013, the percentage of people using social networking sites via a mobile device will be up to a whopping 730 million from 54 million in 2008. Marketers who see social networking as a means to connect with moms should develop their marketing strategies with advanced mobile computing in mind.

Be that as it may, mobile marketing will not be effective if brands pursue mass, impersonal, one-to-many tactics. Consumers admit that they will only be interested in direct marketing approaches that allow interaction.⁴⁴ If done correctly, mobile marketing has the potential to engage consumers in an evolving relationship where the consumer is given the ability to have their unique needs met.

Even before smartphones attain widespread penetration, standard mobile devices still provide opportunities to marketers. The use of short codes is a proven mobile marketing tactic because they encourage the consumer to

participate as opposed to consuming random, unsolicited, and annoying advertisements.⁴⁵ In this way, moms can interact with a brand they personally are interested in and receive discount coupons or additional opportunities to engage in other aspects of the brand. This flavor of mobile marketing will set the stage for a longer conversation between moms and their favorite brands, all at the touch of their cell phone keypad.

Juniper Research again reports that by 2011, an estimated 3 million mobile coupons will rake in over 87 billion in sales.⁴⁶ Well-targeted mobile marketing done in real time is the ideal, and marketers need to get to the drawing board and figure out how to make it happen because the infrastructure to support it is widely available.

Virtualization

Augmented reality is a technology that allows users to interact with virtual content in relation to a 'real world' experience. We expect this technology to gain a strong foothold in 2010, expanding the capabilities of the mobile device. With the increased penetration of smartphones and the proliferation of mobile applications, marketers should be targeting smartphones like the Apple iPhone to support augmented reality applications.⁴⁷

Augmented reality could have a significant impact on mobile marketing; it is going to make the shopping experience more real and personal. Imagine a world where moms could walk into Wal-Mart and hold up their smartphones to the products in the aisle, and get details for sales and promotions, product reviews, price comparisons, usage information, and any other information they need to make their purchasing decisions - right there on their phone.

Tests have been conducted on an augmented reality tool that would enable women to try on clothes from a store virtually. This would be possible with the help of a camera that would assess her physical characteristics and then construct an image of what she would look like in the dress on-screen. The customer will then be able to connect with other users for their opinion.⁴⁸

⁴⁴<http://mmaglobal.com/articles/getting-social-mobile> | ⁴⁵<http://mmaglobal.com/articles/making-short-codes-call-action-ads> | ⁴⁶<http://mmaglobal.com/articles/print-mobile-coupons-why-sunday's-newspaper-coupons-will-soon-be-obsolete> | ⁴⁷<http://blog.futurefacts.net/2009/07/08/2010-mobile-augmented-reality-and-ubiquitous-commerce/> | ⁴⁸<http://www.warc.com/News/TopNews.asp?ID=25476&Origin=WARCNewsEmail>

Clearly, there are wide-ranging marketing opportunities through augmented reality. Companies like Proctor and Gamble, Microsoft, and General Electric are already experimenting with augmented reality campaigns. It is only a matter of time before the use of augmented reality becomes mainstream. Marketers should be constantly searching for unique ways to use this technology and engage moms in their shopping experiences by developing tools that provide real value.

SOCIAL TRENDS

The social trend we forecast as having the most impact on mom's shopping activities is the 'eco-friendly' and sustainability movement. The environment and its conservation has been a trending topic for quite a while now, especially after widespread concern about global warming. 'Going green' has been a key consideration for most companies and their brands.

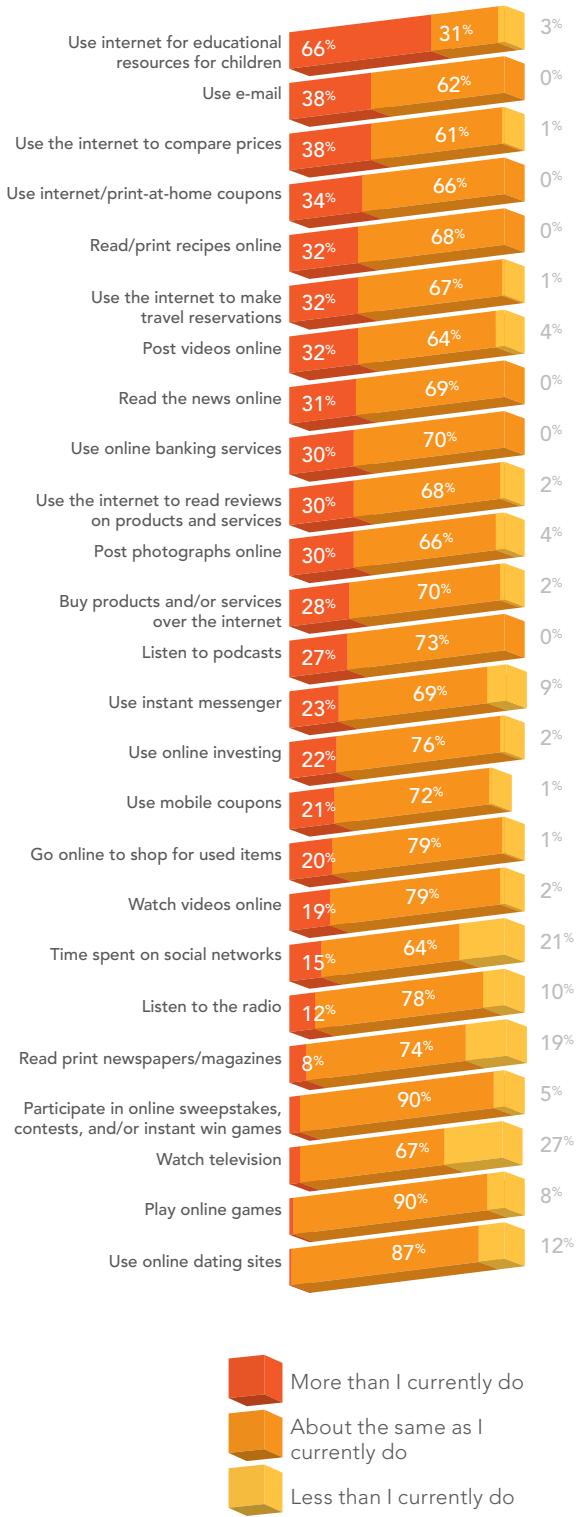
Over the past decade, there has been a significant increase in awareness of environmental issues. From hybrid automobiles to green buildings, consumers, and moms are looking for ways participate in the movement. This doesn't mean moms will sacrifice by choosing higher cost and less convenient options.

Considering the American consumers' economic hardships, it is doubtful that moms will make significant price concessions to 'go green'.⁴⁹ Consumers are happy to contribute in saving the environment as long as it does not hurt their own pocketbook too much.

Companies focusing on green products need to also focus on price and value, incorporating these messages into their marketing campaigns. Moms will closely assess the merits of going-green on a cost-benefit ratio.

Household appliance giant Whirlpool, for example, has introduced a new line of washing machines and dryers to help reduce water and energy consumption, while getting the washing and drying done in less time. For moms, this is great news on several fronts. With cuts in electricity and water bills, not to mention the time spent doing laundry, moms can readily justify going-green. Mom, the brand and the environment are all winners.

ANTICIPATED MEDIA PARTICIPATION AND CONSUMPTION



⁴⁹<http://redgreenandblue.org/2009/03/05/can-green-get-more-lean/>

BRAND MARKETER RECOMMENDATIONS

This section is a summary of the results and patterns found from both the primary and secondary research we conducted. For each observation, there is an analysis of the potential effect on marketers, and suggestions on how marketers can use this analysis to improve their digital marketing-to-moms campaigns over the next 1-3 years.

1 Digital continues to erode traditional media

A significant percentage of moms anticipate spending much more time participating in digital activities in the next 1-3 years, but less time watching television, reading newspapers and magazines, and listening to the radio.

WHAT IT MEANS TO MARKETERS

Marketers should be allocating more resources to digital, and less to traditional channels. In addition, marketers should pay careful attention to the specific digital activities moms are currently engaged in as well as digital activities moms anticipate spending more time with in the next few years.

Marketers should also be looking to their digital agencies for strategic and creative leadership. Traditional advertising agencies are typically not adept at developing strategies or creative solutions that harmonize with the user mindset in the digital eco-system. Digital isn't a one-to-many communications channel, and using digital as purely a medium to broadcast brand messages is a mistake.

2 Moms are getting even smarter... wherever they are

Smartphone adoption rates are growing rapidly. Only 28% of moms in our study anticipate not having a smart phone in the next 1-3 years. Smartphones will give mom's access to product information wherever they are, especially at shelf.

WHAT IT MEANS TO MARKETERS

After many years of unfulfilled hype, mobile will finally become an important channel for marketers. Brands need to immediately spend time on their mobile marketing strategies understanding how users currently interact with this platform and how they might be able to use it to market to moms in the next 1-3 years.

We speculate that moms will want to use smartphones primarily for their utility and recommend marketers take an application focus (email, apps, coupons, etc.), refraining from using this technology primarily for one-to many messaging/branding campaigns.

3 Moms are on Facebook, but their activity there may plateau

Most moms are using social networking sites to connect with friends, family, coworkers, old classmates...and to monitor their children. However, our survey indicates that moms in aggregate don't expect to be spending any more time than they currently do on social networking sites over the next 1-3 years.

WHAT IT MEANS TO MARKETERS

Moms spend a considerable amount of time on Social Networking sites. Brands need to continue experimenting and learning how to engage moms in the social networking space, but do so with great care. Finding and activating mom-influencers who are relevant to your product should be a critical function of your social strategy, even if the 'influencing' occurs outside of the digital eco-system.

Brands should also keep in mind that the time moms spend on social networking activities might plateau over the next 1-3 years. However, we see moms increasingly participating in their social networks via mobile devices. Brands that can take advantage of this trend may be able to get a leg up on the competition.

If you're a brand marketer with children as your consumer target, be sure you're using marketing activities that won't offend mom. She's watching.

4 Moms use digital to evaluate products before making purchase decisions

Moms use digital heavily as a shopping research tool, and anticipate using it even more heavily over the next 3 years. 67% of Moms in our survey go online to do price comparisons, and 38% said they would be using online for price comparisons even more frequently in the next 1-3 years.

WHAT IT MEANS TO MARKETERS

Don't suck. Clever marketing communications won't be enough to trump price or poor product attributes. Moms are going to be even more price savvy and value conscious in the future. Brands will need to be more sensitive to pricing through all channels and be able to make a convincing value proposition.

Mom's will be much more informed about products and swayed even more heavily by online reviews. This trend combined with mobile access could become an important element at retail, where moms will use their smart phones to quickly access price information, ratings, etc. before purchasing.

Brands with inferior performance characteristics will have an increasingly difficult time competing, and traditional promotion and advertising will not be enough to fill the gap.

Marketers should be doing more to encourage their satisfied customers to post reviews online so they live eternally. They should also be actively monitoring review sites and remedying issues with dissatisfied users.

Through online reviews moms are defining brands beyond what marketers can achieve through advertising. As a result, reputation management should be a critical component of any long-term digital strategy.

5 Moms are big on photo and video-sharing

A large constituency of the moms we surveyed plan to post more photos and videos online in the next 1-3 years.

WHAT IT MEANS TO MARKETERS

Moms are interested in producing and cataloging digital photos and video, but this doesn't mean moms are interested in producing branded content. Some marketers may be able to offer value to moms through applications and technologies which will enable them post, manipulate, and catalog their photos and videos online.

We feel there may be opportunities for some brands to capitalize on their interest in digital scrapbooking, online video editing, and content manipulation – so long as the tools are simple enough.

6 Moms are turning to the web for their children's educational needs

A large constituency of moms plan on using the internet more to access educational resources for their children in the next 1-3 years.

WHAT IT MEANS TO MARKETERS

Brands should continue to look for opportunities that provide relevant educational content for children either by partnering with respected creators of educational content or by developing opportunities to create niche educational content in areas where there isn't already a strong presence. Brands that are viewed to be helping moms with the education of their children will likely see an affinity payoff.

7 Moms will be sticking to what they started with — e-mail

A large percentage of Mom's anticipate using email much more in the next 1-3 years.

WHAT IT MEANS TO MARKETERS

Email marketing may seem passé, but it will remain an important channel for marketers over the next few years. Brands should continue to invest in optimizing their email marketing plans by experimenting with new ways to provide value to consumers while integrating with other marketing activities.

8 Moms and coupons

A large constituency of moms plan on using the internet more to download and use internet coupons in the next 1-3 years. A quarter of moms surveyed also showed interest in using mobile coupons.

WHAT IT MEANS TO MARKETERS

With economists forecasting slower growth and high unemployment over the next few years, price conscious moms will continue to seek discounts and coupons. Brands should be exploring new ways to use internet coupons as a gateway to other marketing activities. Also, brands should pay close attention to developments in mobile couponing and make their implementation plans accordingly. As mobile coupons become commonplace, they will prove to be a powerful tie-breaker at the shelf.

CONCLUSIONS

Moms are going to have increased access to product information through digital resources. These tools will provide marketers with opportunities to facilitate their shopping experience and sway their purchase decisions.

Marketers need to position themselves ahead of the curve with digital technologies. As mom access information and resources at her disposal, their brand can be well represented in all areas.

This will require marketers to make careful choices with their traditional media spend, ensuring the traditional channels they use are well optimized and better integrated with digital marketing activities.

When marketers are developing digital campaigns that target moms, more emphasis should be placed on conversation and utility. Moms don't want to be marketed at, they want to be marketed with.

Marketers who wish to target the mom market as a whole need to focus on messages that all moms identify with.

Social media presents both great potential and great risk for brands. Marketers should focus on influencing the conversation instead of broadcasting brand messages. Word of mouth from trusted friends and family are an important force in influencing purchase decisions for moms.

Mobile marketing must be on the drawing board for brands, even more so now when many moms will be using smart phones. Brands need to be investing in opportunities to use mobile coupons, augmented reality, location tagging, and other mobile applications in order to forge a relationship with moms.

Brands that collaborate with mom bloggers should take responsibility in ensuring their relationships are transparent. They should also be prepared to respond appropriately to honest feedback and criticism, letting readers know they're actively listening and taking steps to improve the brand experience for every customer.

Marketers using an eco-friendly positioning need to address affordability and overall value. Mom's increasing frugality will demand going-green is an affordable option if they are to become loyalists.

Marketers need to recognize that moms will be more price conscious as digital gives moms greater access to price information across all channels.



METHODOLOGY

Research Objectives

The purpose of our research was to determine the channels of digital media moms are currently using, and more importantly, the depth and frequency with which they will continue to employ digital technologies over the next one to three years. The research objectives were as follows:

1. To identify how moms are currently using digital media
2. To understand how moms are employing digital media at the different stages of the purchasing process and which channels are most effective at each stage
3. To determine digital activities moms are using most
4. To determine digital activities moms intend to use the most in the future
5. To determine how and if the age of a mom and her children affects her digital consumption habits
6. To determine the frequency with which moms intend to use traditional media over the next three years
7. To determine which trends are likely to affect how moms will use digital in the future and what effect these trends will have
8. To identify the things moms need and want from their shopping experience and how marketers can provide it through digital technology

Research Design

The information for this report was gathered through both secondary and primary research.

Secondary Research

A significant amount of this report is based on secondary data gathered from the internet: articles, professional blogs, white paper reports, case studies, websites etc. Please refer to footnotes for more information.

Primary Research

The primary research was intended to support and validate the secondary research which was conducted on the internet. An unscientific online poll consisting of 69 questions was completed by 175 moms. The target population was women between 20 and 54 who live in the United States with one or more children. The survey was distributed on a word-of-mouth basis for a random sample and was left to run online for a period of two weeks. It was created using Survey Monkey, a web-based survey application. The majority of the questions were multiple-choice with the exception of a few open ended questions where we solicited additional insight. Our survey questions can be found in the Appendix.

We anticipated a bias because the survey was emailed to the sample and therefore respondents were expected to use the internet regularly. However, this bias was not considered significant because we did not anticipate respondents to represent the broader American mom population. The intent of the survey was to identify any variances from the secondary data gathered and to gain some insights on how the respondents (moms who are currently using digital media) believed they would be using digital media in the next 1-3 years.

Data Analysis

Filters were used to sort the data; they were used to observe patterns and variances across the different age groups of moms, the different channels of digital media and the different age groups of the children.

The statistics cited in this paper were derived from the 'Moms with children 18 or under' filter.

APPENDIX

The following is a copy of the survey that was created for the primary research section of this report.

MOMS AND MEDIA SURVEY

1. GENDER:
[Male, Female]
2. AGE:
[24 or younger, 25-32, 33-40, 41-47, 48 or older]
3. How many kids do you have?
[0,1,2,3,4,5,6,7 or more]
4. How old are your kids? (select all that apply)
[under 1 year, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19 or older]
5. What state do you live in?
[states list]
6. What is your marital status?
[Single, Married, Divorced/Separated]
7. How many hours do you spend on the internet from home each week?
[0, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20 or more]
8. How many hours do you spend on the internet at a workplace each week?
[0, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20 or more]
9. Which of these do you currently do? (check all that apply)
[blogging, share photos ex. flickr, share videos ex. youtube, social networking ex. facebook, myspace etc., microblog ex. twitter, participate in other community sites, Other (please specify) text field]
10. When online, do you read, watch, and/or comment on? (check all that apply)
[blogs, photo sharing sites, video sharing sites, social networks, microblogs, other community sites, Other (please specify)]
11. Have you joined a Social Network (ie. Facebook, MySpace, LinkedIn) in the past 2 years?
[Yes, No]
12. Why did you join?
[text field]
13. How many Social Networks do you belong to?
[0, 1, 2, 3, 4, 5, 6, 7, 8 or more]
14. How many hours weekly do you spend on your social network(s)?
[0, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23 or more]
15. How active will you be with your social network(s) in the next 1-3 years?
[I'll spend more time, I'll spend the same amount of time, I'll spend less time]
16. Do you currently own a smartphone (ex. iphone, blackberry)?
[Yes, No]
17. Do you plan on owning a smartphone in the next 1-3 years?
[Yes, No, Maybe]
18. How often do you use the internet to compare prices on products and services?
[Frequently, Occasionally, Never]
19. In the next 1-3 years, how often will you use the internet to compare prices on products and services?
[More than I currently do, Less than I currently do, About the same as I currently do]
20. How often do you use the internet to read reviews on products and services?
[Frequently, Occasionally, Never]
21. In the next 1-3 years, how often will you use the internet to read reviews on products and services?
[More than I currently do, Less than I currently do, About the same as I currently do]
22. How often do you play online games?
[Frequently, Occasionally, Never]
23. In the next 1-3 years, how often will you play online games?
[More than I currently do, Less than I currently do, About the same as I currently do]
24. How often do you post photographs online?
[Frequently, Occasionally, Never]
25. In the next 1-3 years, how often will you post photographs online?
[More than I currently do, Less than I currently do, About the same as I currently do]

26. How often do you post videos online?
[Frequently, Occasionally, Never]
27. In the next 1-3 years, how often will you post videos online?
[More than I currently do, Less than I currently do, About the same as I currently do]
28. How often do you participate in online sweepstakes, contests, and/or instant win games?
[Frequently, Occasionally, Never]
29. In the next 1-3 years, how often will you participate in online sweepstakes, contests, and/or instant win games?
[More than I currently do, Less than I currently do, About the same as I currently do]
30. How often do you use the internet for educational resources for your kid(s)?
[Frequently, Occasionally, Never]
31. In the next 1-3 years, how often will you use the internet for educational resources for your kid(s)?
[More than I currently do, Less than I currently do, About the same as I currently do]
32. How often do you buy products and/or services over the internet?
[Frequently, Occasionally, Never]
33. In the next 1-3 years, how often will you buy products and/or services over the internet?
[More than I currently do, Less than I currently do, About the same as I currently do]
34. How often do you go online to shop for used items (ie. Craigslist, eBay, newspaper classifieds)?
[Frequently, Occasionally, Never]
35. In the next 1-3 years, how often will you go online to shop for used items?
[More than I currently do, Less than I currently do, About the same as I currently do]
36. How often do you use internet/print-at-home coupons?
[Frequently, Occasionally, Never]
37. In the next 1-3 years, how often will you use internet/print-at-home coupons?
[More than I currently do, Less than I currently do, About the same as I currently do]
38. How often do you read the news online?
[Frequently, Occasionally, Never]
39. In the next 1-3 years, how often will you read the news online?
[More than I currently do, Less than I currently do, About the same as I currently do]
40. How often do you watch videos online?
[Frequently, Occasionally, Never]
41. In the next 1-3 years, how often will you watch videos online?
[More than I currently do, Less than I currently do, About the same as I currently do]
42. How often do you read/print recipes online?
[Frequently, Occasionally, Never]
43. In the next 1-3 years, how often will you read/print recipes online?
[More than I currently do, Less than I currently do, About the same as I currently do]
44. How often do you use coupons downloaded to your mobile phone?
[Frequently, Occasionally, Never]
45. In the next 1-3 years, how often will you use coupons downloaded to your mobile phone?
[More than I currently do, Less than I currently do, About the same as I currently do]
46. How often do you use online banking services?
[Frequently, Occasionally, Never]
47. In the next 1-3 years, how often will you use online banking services?
[More than I currently do, Less than I currently do, About the same as I currently do]
48. How often do you use online investing?
[Frequently, Occasionally, Never]
49. In the next 1-3 years, how often will you use online investing?
[More than I currently do, Less than I currently do, About the same as I currently do]
50. How often do you listen to podcasts?
[Frequently, Occasionally, Never]
51. In the next 1-3 years, how often will you listen to podcasts?
[More than I currently do, Less than I currently do, About the same as I currently do]
52. How often do you use the internet to make travel reservations?
[Frequently, Occasionally, Never]

53. In the next 1-3 years, how often will you use the internet to make travel reservations?
[More than I currently do, Less than I currently do, About the same as I currently do]
54. How often do you use online dating sites?
[Frequently, Occasionally, Never]
55. In the next 1-3 years, how often will you use online dating sites?
[More than I currently do, Less than I currently do, About the same as I currently do]
56. How often do you use instant messenger (ie. AIM, Yahoo Messenger, etc.)?
[Frequently, Occasionally, Never]
57. In the next 1-3 years, how often will you use instant messenger?
[More than I currently do, Less than I currently do, About the same as I currently do]
58. How often do you use e-mail?
[Frequently, Occasionally, Never]
59. In the next 1-3 years, how often will you use e-mail?
[More than I currently do, Less than I currently do, About the same as I currently do]
60. Which of these do you use? (check all that apply)
[mobile phone, desktop computer, laptop computer, game console, ipod/mp3 player, GPS]
61. How often do you watch television?
[Frequently, Occasionally, Never]
62. In the next 1-3 years, how often will you watch television?
[More than I currently do, Less than I currently do, About the same as I currently do]
63. How often do you read print newspapers/magazines?
[Frequently, Occasionally, Never]
64. In the next 1-3 years, how often will you read print newspapers/magazines?
[More than I currently do, Less than I currently do, About the same as I currently do]
65. How often do you listen to the radio?
[Frequently, Occasionally, Never]
66. In the next 1-3 years, how often will you listen to the radio?
[More than I currently do, Less than I currently do, About the same as I currently do]
67. Do you currently operate a home business that markets to online customers?
[Yes, No]
68. In the next 1-3 years will you operate a home business that markets to online customers?
[Yes, No, Maybe]
69. Please share any additional comments on how you are currently using digital media, or how you plan to use digital media in the future.
[text field]

ABOUT INFUZ

INFUZ is a digital creative agency with a comprehensive understanding of digital behavior. We use these insights about your audience to create digital experiences that can change how they think and feel about your brand. The digital experiences we create are unique, engaging, and results-focused.

We've found interactive experiences can lead to powerful results for brand marketers, arousing awareness, sparking trial, or stirring brand adoration. Relevant, meaningful experiences change the way consumers think and feel, and how they act.

We see your consumers as active participants, not as a passive audience. We inspire them by creating engaging experiences that are relevant and have meaning.

Ultimately, the interactive experiences that we create change behavior.

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