

 babycenter.
21ST CENTURY MOM[®] Insights Series

iab.

2015 State of Modern Motherhood: Mobile and Media in the Lives of Moms

February 2015

Moving Millennials Into Motherhood

Average age of a first
time mom: **US = 25.8**

.....

Nearly **4MM** births
a year in the US –
83% of new moms
are millennials

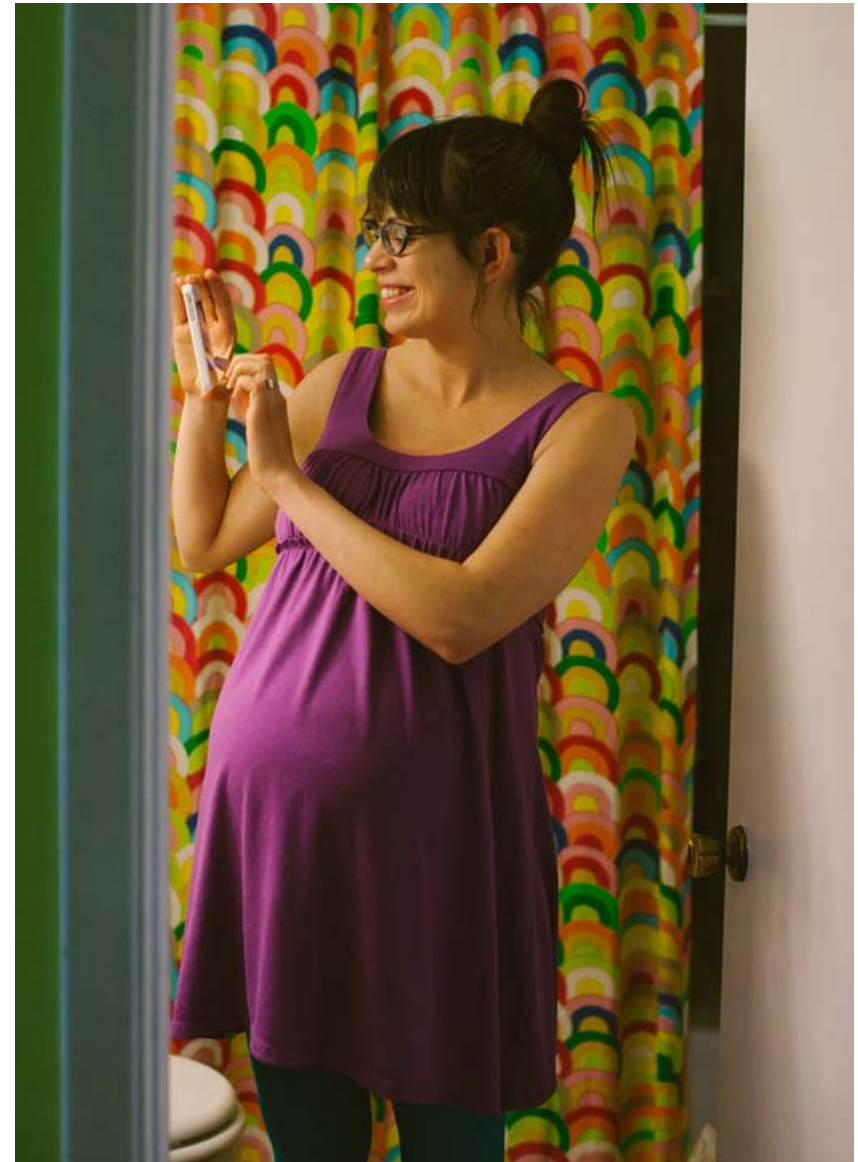
.....

Worldwide, **8 in 10**
births are to millennials
– over **100MM** globally
each year

This study defines Millennials as 18-32-year olds.

Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015. CDC, final birth data for 2013. CIA World Fact Book.

© BabyCenter, LLC. Confidential. All rights reserved.



The Demands of Being a US Modern Mom

More to do, less time to do it

9+ hours added to her day; 13 fewer hours for herself

Much more likely to work than their own moms were

65% of women with children under 6 years old work; about 2x more than the previous generation

She needs to build her own village

52% say extended family is less likely to live nearby; though 62% say dads are pitching in

She's a one woman show

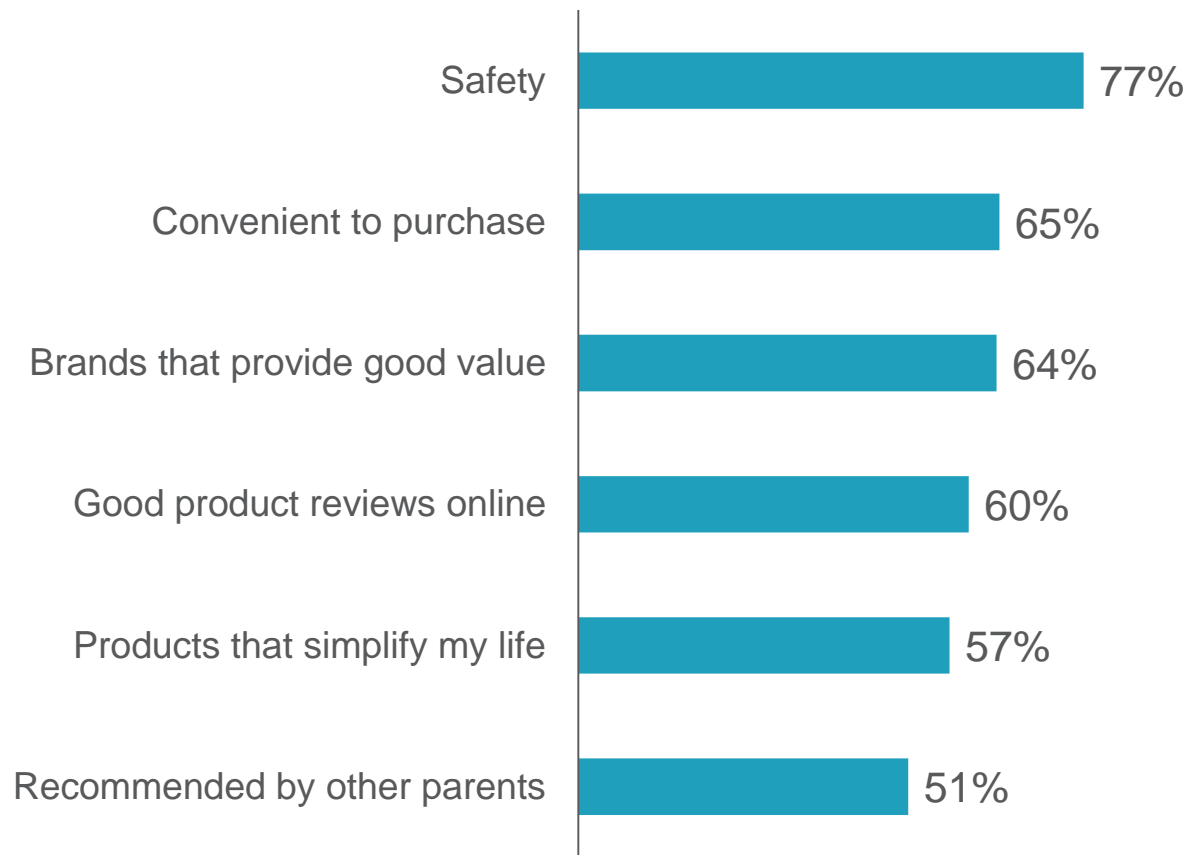
61% of births to millennial moms are to unmarried women

Motherhood Puts Brand and Shopping Habits in Flux

Motherhood Shifts Her Purchasing Criteria

Q: Which of these criteria are important when making everyday purchases? *(select all that apply)*

US Millennial Moms



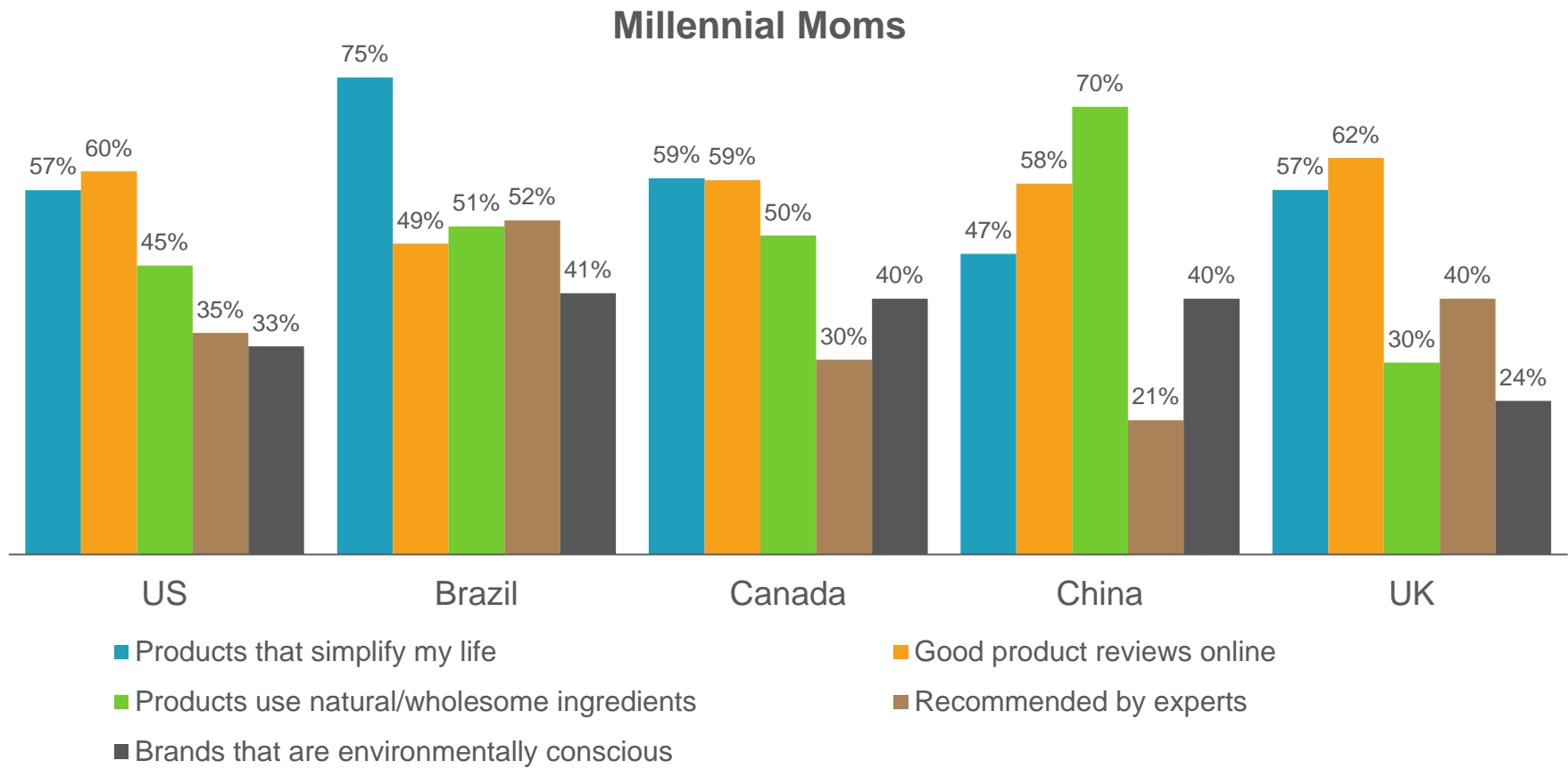
Compared to 2013, among US millennial moms:

Good value **-26%** less important *(economy improving)*

Recommendations from other parents are **+11%** more important

Some International Comparisons

Q: Which of these criteria are important when making everyday purchases?
(select all that apply)

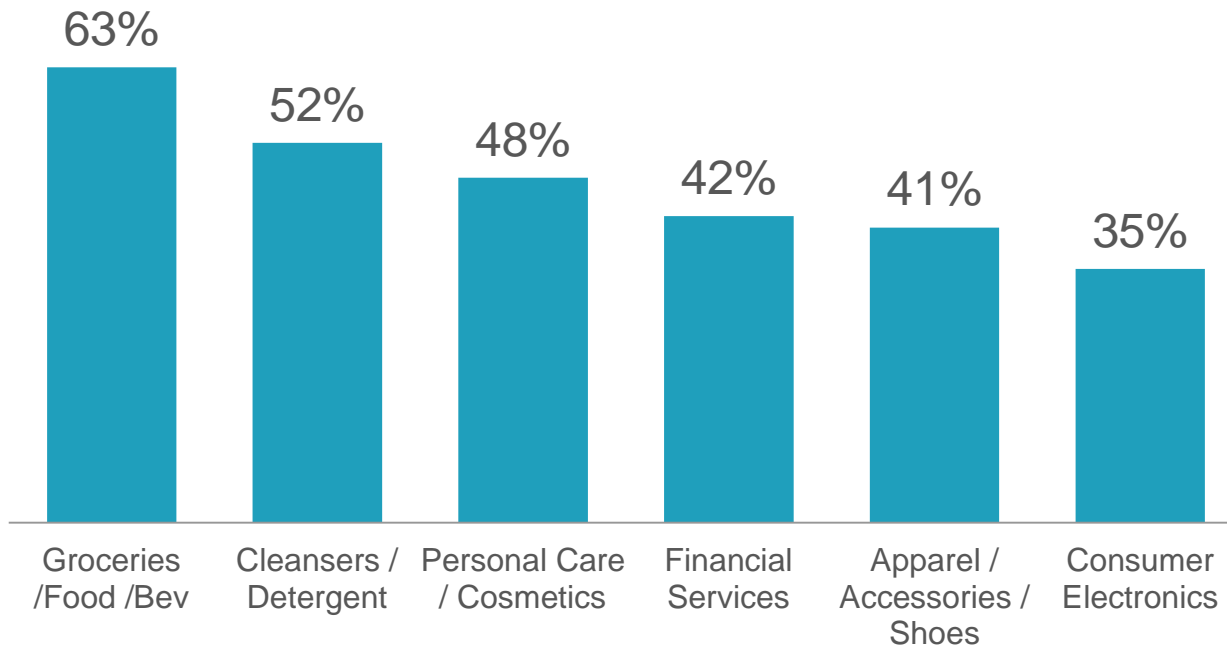


Motherhood is a Catalyst for New Brand Choices

Q: Since becoming a mom, have you changed your purchase criteria across these categories?

US Millennial Moms

■ Changed purchasing criteria

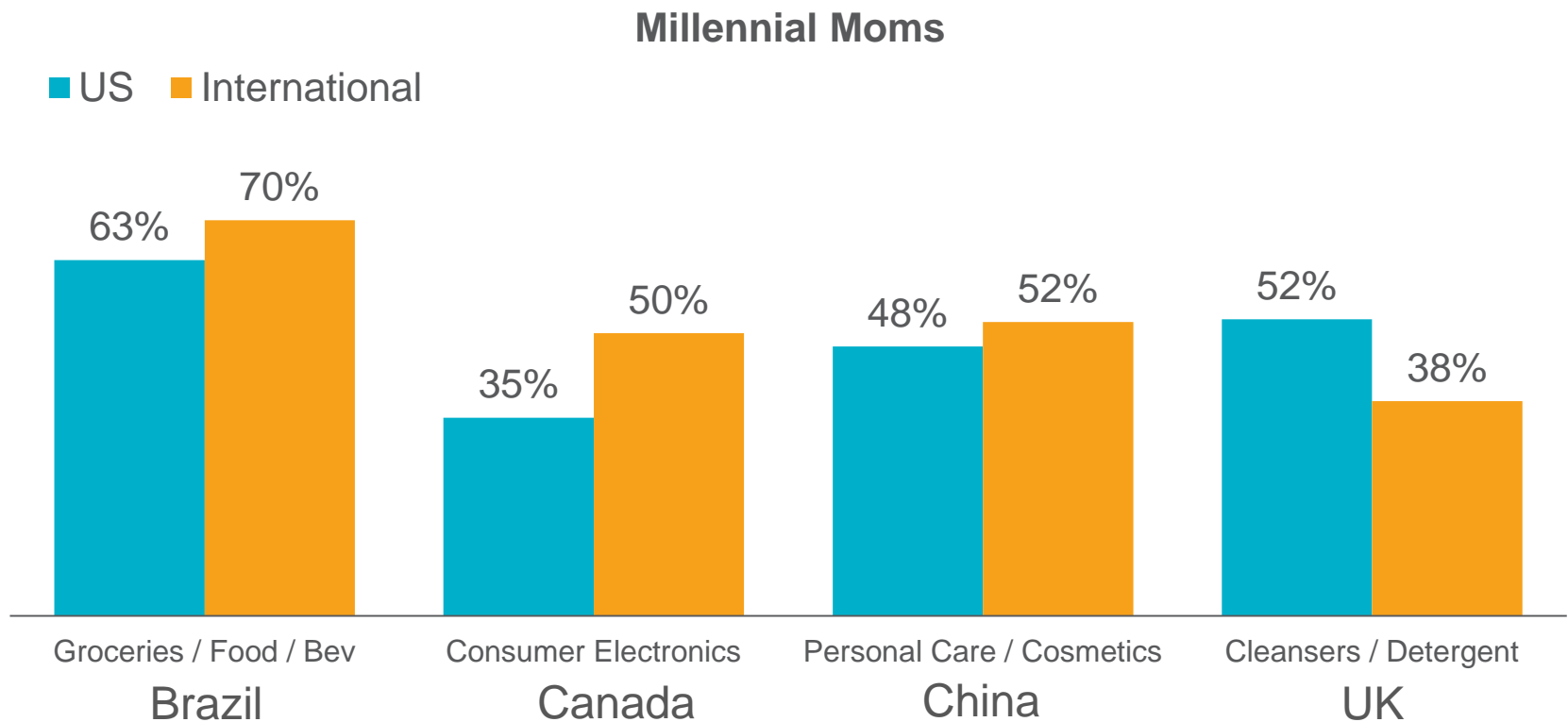


\$13,127

Average amount US moms spend on a child annually

Some International Comparisons

Q: Since becoming a mom, have you changed your purchase criteria across these categories ?



See appendix for all related international data.

Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

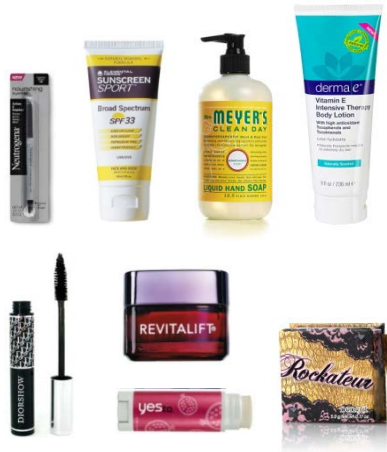
Brand Shifts in Personal and Beauty Care



Katie, 30
📍 Chicago, IL

Lives with husband. Katie is a full-time grad student and was working full-time until her baby girl arrived.

Before Pregnancy



During Pregnancy



Five Weeks After Baby



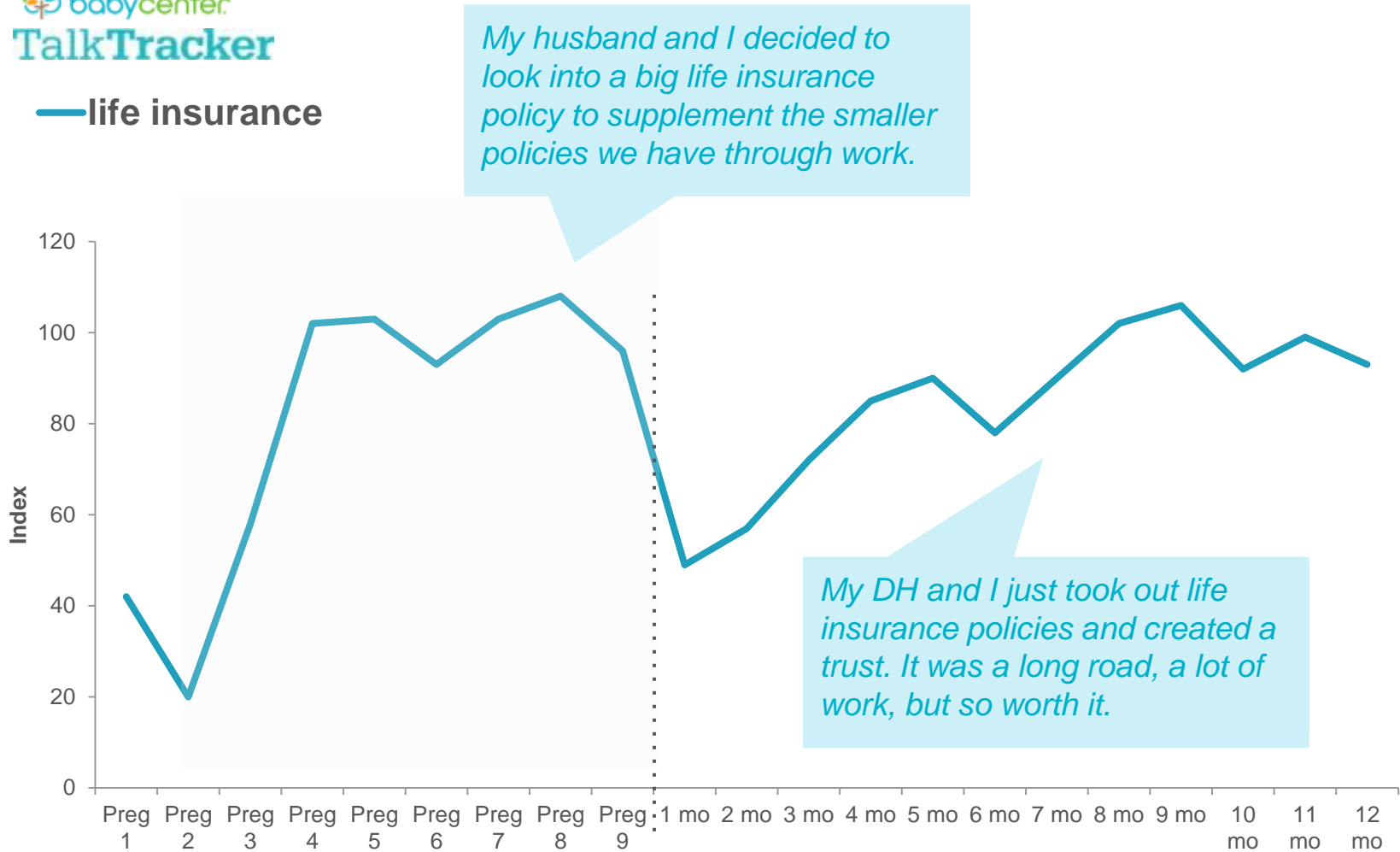
6+ Weeks After Baby



For US Moms, New Financial Products Come Into Focus



— life insurance



My husband and I decided to look into a big life insurance policy to supplement the smaller policies we have through work.

My DH and I just took out life insurance policies and created a trust. It was a long road, a lot of work, but so worth it.

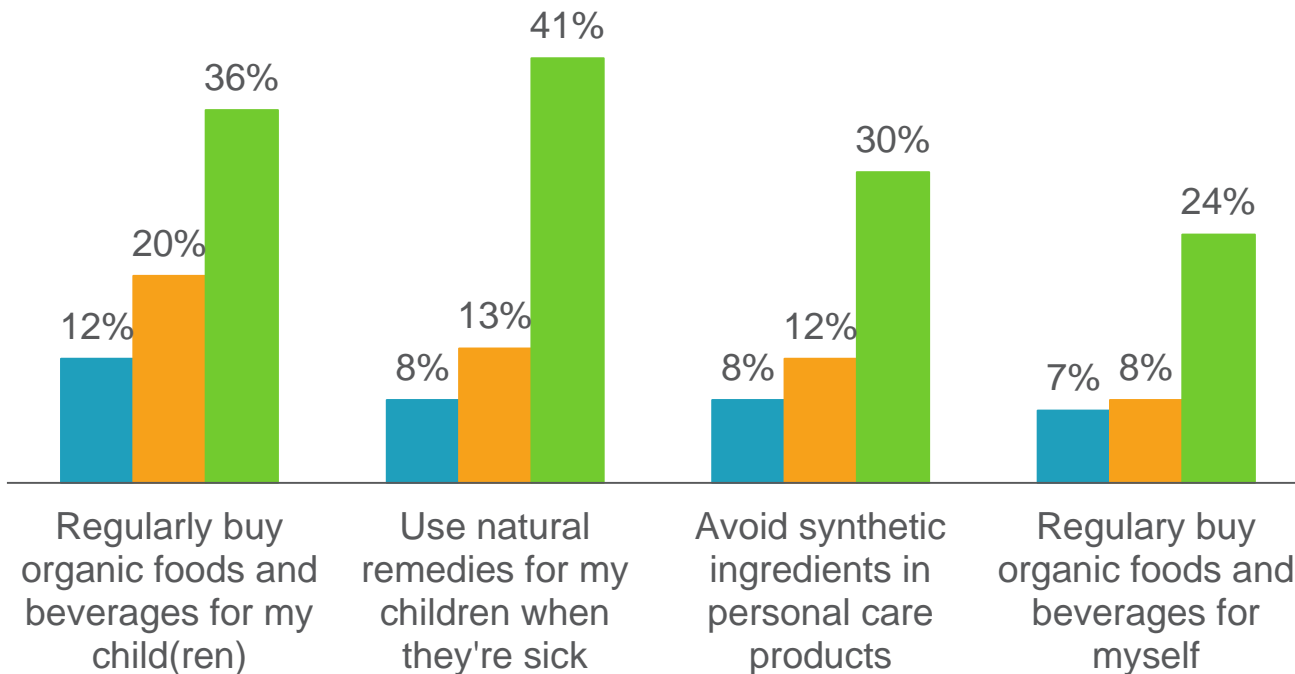
Source: BabyCenter 21st Century Mom® Insights Series, 2015 State of Modern Motherhood Report, January 2015; BabyCenter 21st Century Mom® Talk Tracker, Feb 2011 – Feb 2014. Based on 20,866 mentions of the term “life insurance” indexed to 122 million conversations among registered users within the BabyCenter Community.

Organics and Ingredients Matter More Today Than Ever Before

Q: How much do you agree/disagree with each statement?
(% who agree strongly or somewhat)

US Millennial Moms

■ 2006 ■ 2009 ■ 2014



45%

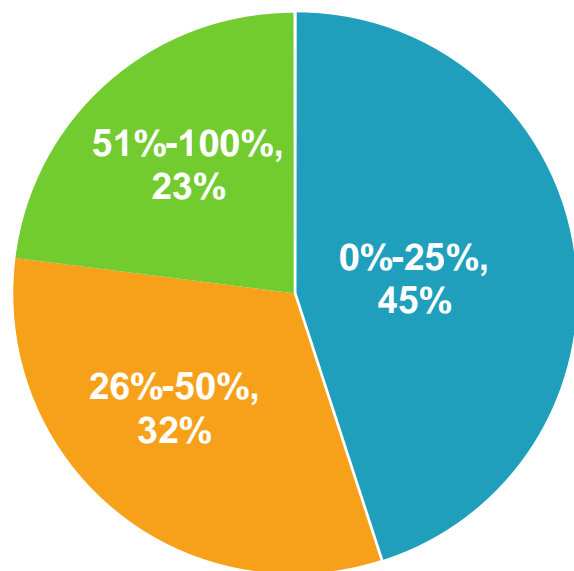
of US millennial moms say natural/wholesome ingredients is an important criteria when making everyday purchases

Source: 2015: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015. 2009: BabyCenter 21st Century Mom®, Many Faces of Mom Report, 2006: BabyCenter Segmentation study, Q25. How much do you agree or disagree with each of the following statements? (top 2 box).

Online Shopping Increases

Q: What percent of your shopping would you say you do online?

US Millennial Moms

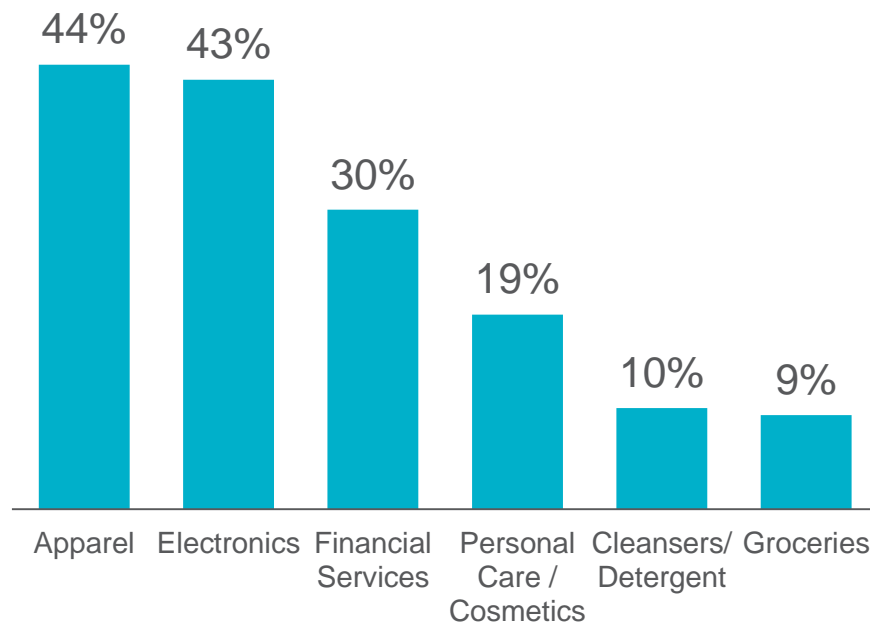


1 in 4 do half or more of their shopping online

Q: Since becoming a mom, are you more likely to purchase these online?

US Millennial Moms

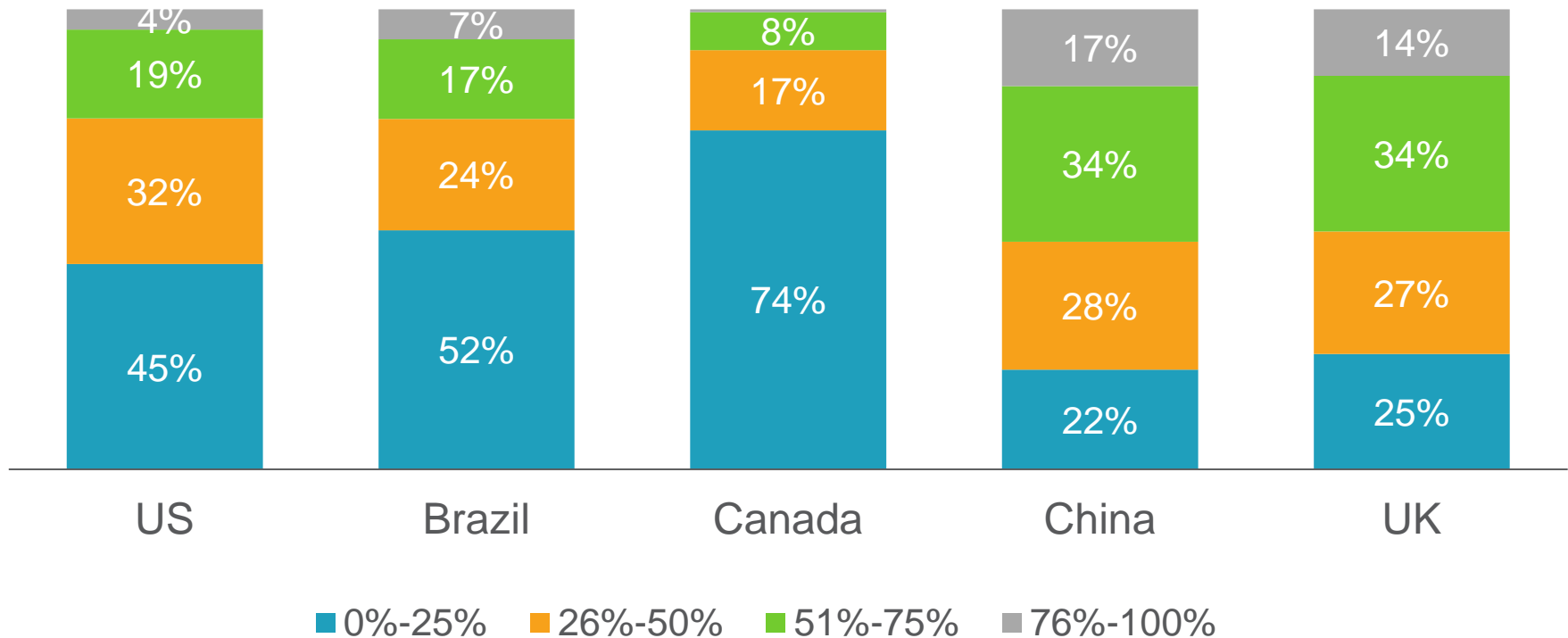
■ % more likely to purchase online, now



Online Shopping Levels Mixed

Q: What percent of your shopping would you say you do online?

Millennial Moms



Smartphones Go Shopping With Mom

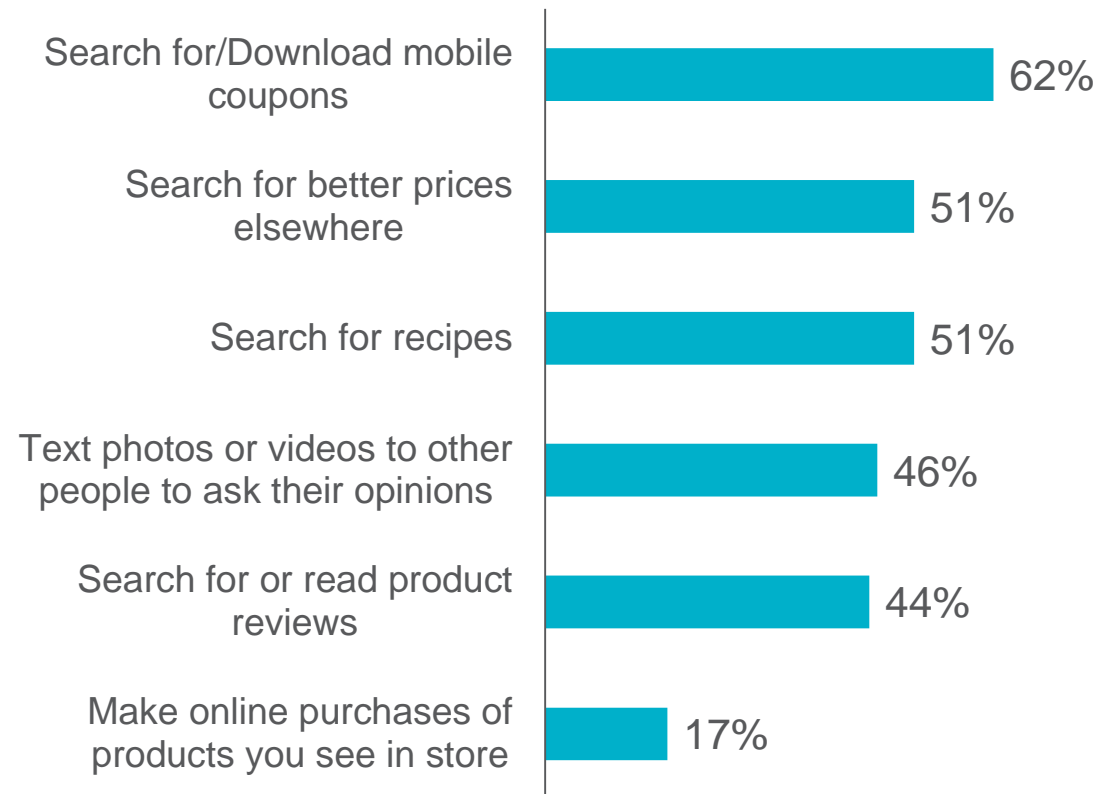
Q: How do you use your smartphone when in-store or out shopping?

(among those who use their phone when out shopping)

8 in 10

US millennial moms use their phone for shopping, while in-store

US Millennial Moms

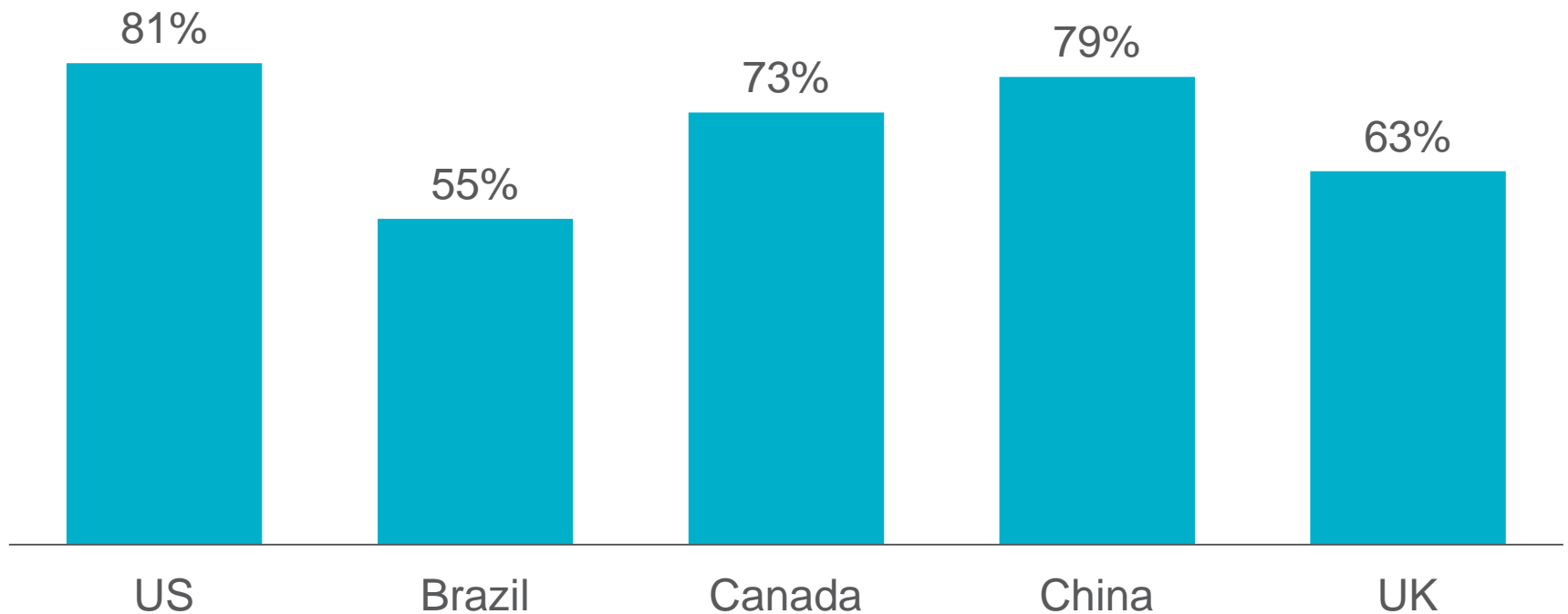


Mobile Shopping By Country

Q: Do you use your smartphone for shopping when in-store?
(among smartphone owners)

Millennial Moms

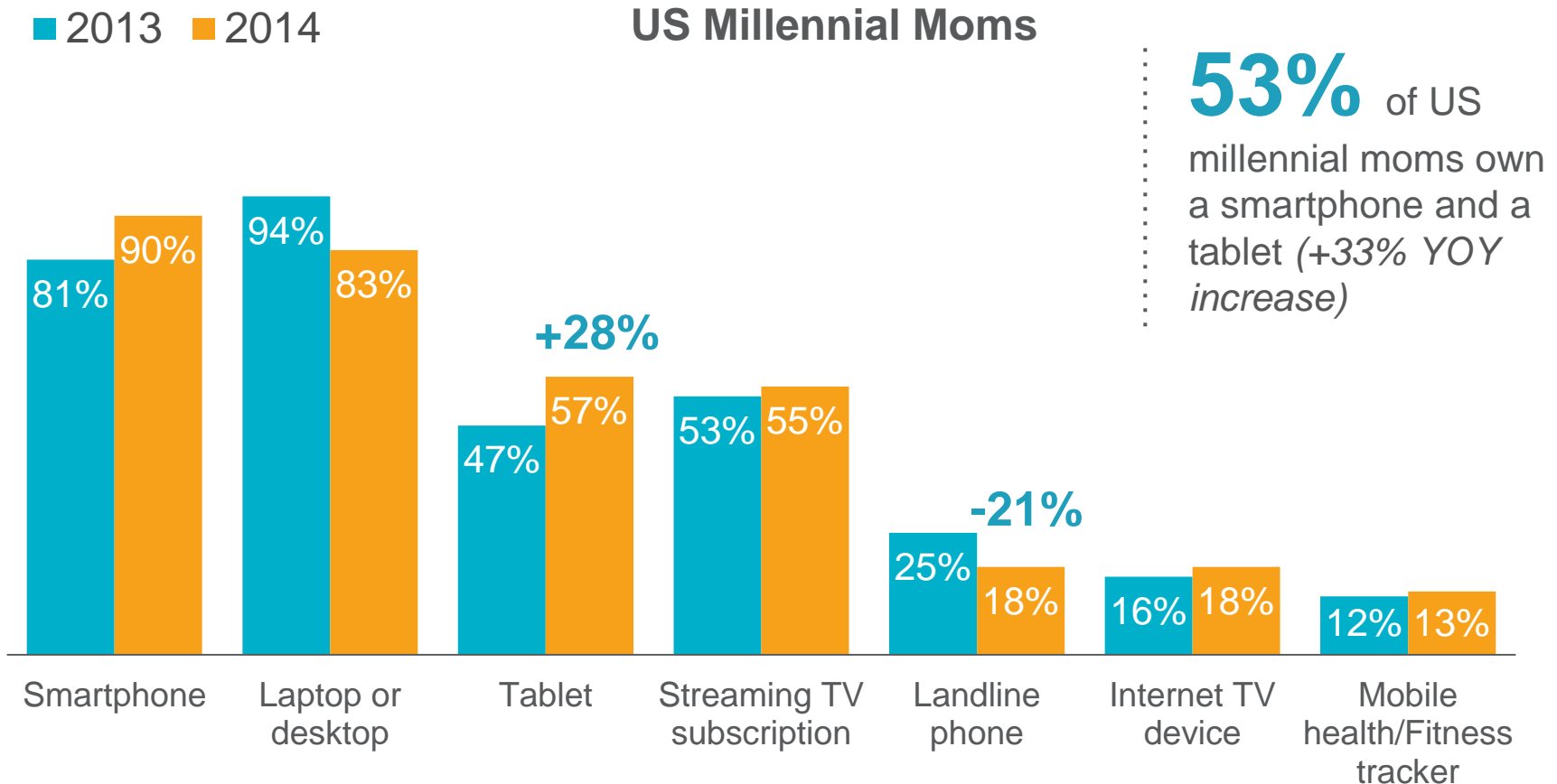
■ % who shop with their phone in-store



Technology and Media Habits Change

US Millennial Moms Are More Likely to Own a Smartphone Than Laptop/Desktop

Q: Do you have any of the following devices or services?

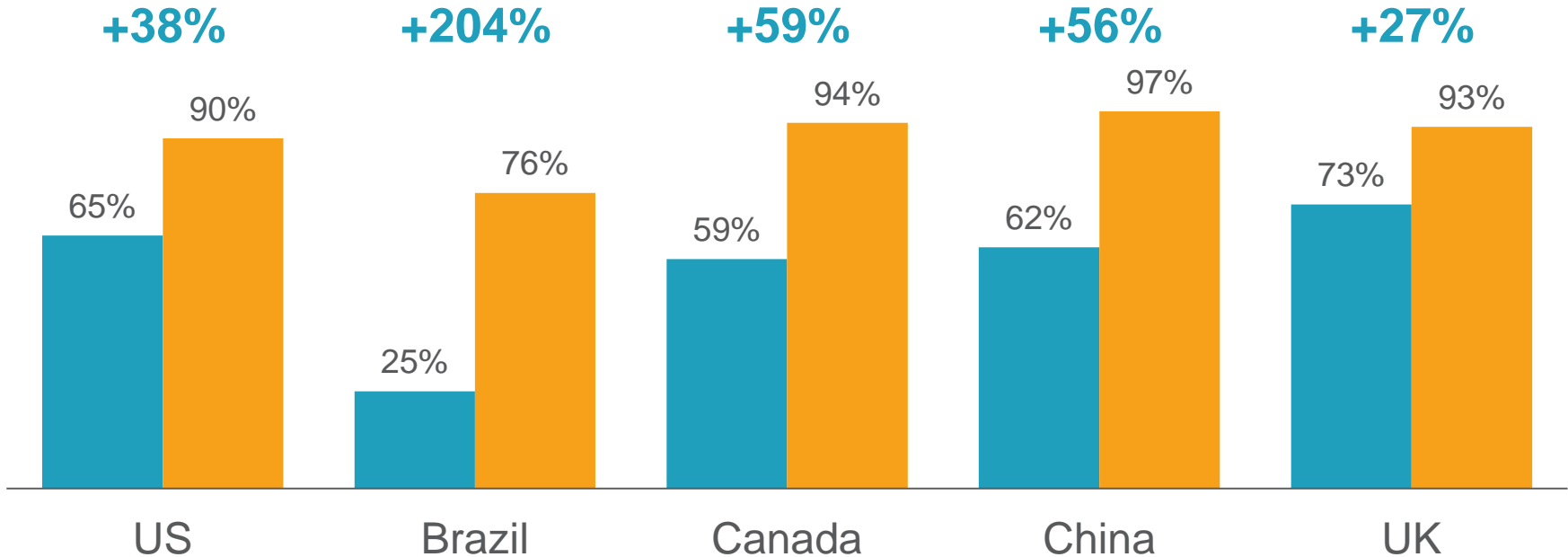


Global Technology Trends: Smartphone

Q: Do you own or regularly use the following devices?

% of Millennial Moms Owning a Smartphone

■ 2012 ■ 2014



See appendix for all related international data.

Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

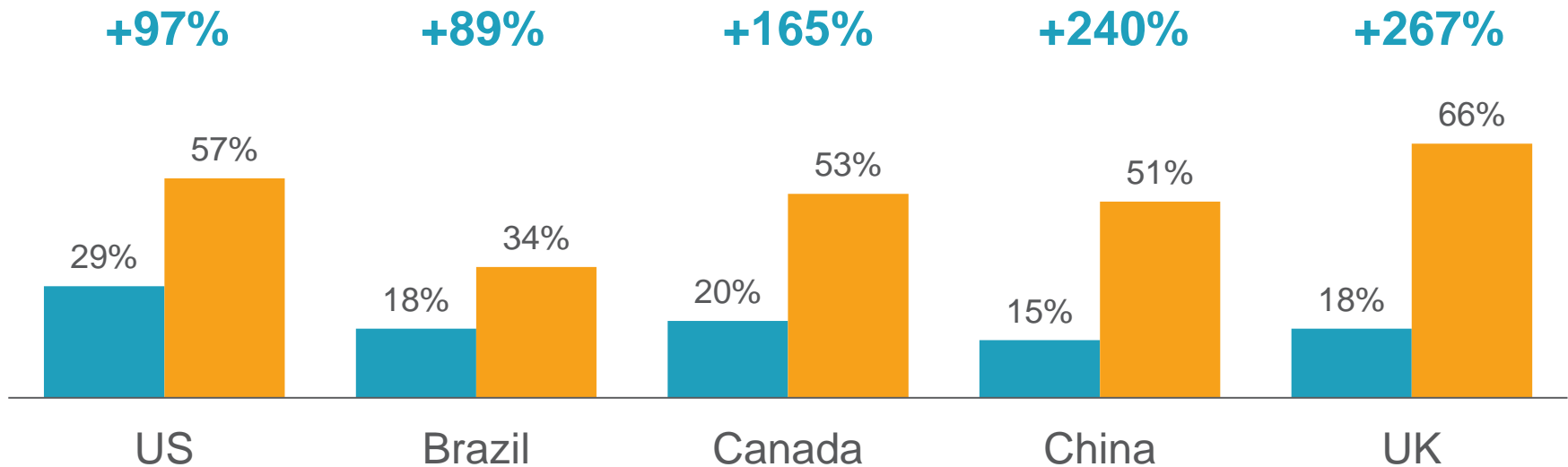
© BabyCenter, LLC. Confidential. All rights reserved.

Global Technology Trends: Tablet

Q: Do you own or regularly use the following devices?

% of Millennial Moms Owning a Tablet

■ 2012 ■ 2014



See appendix for all related international data.

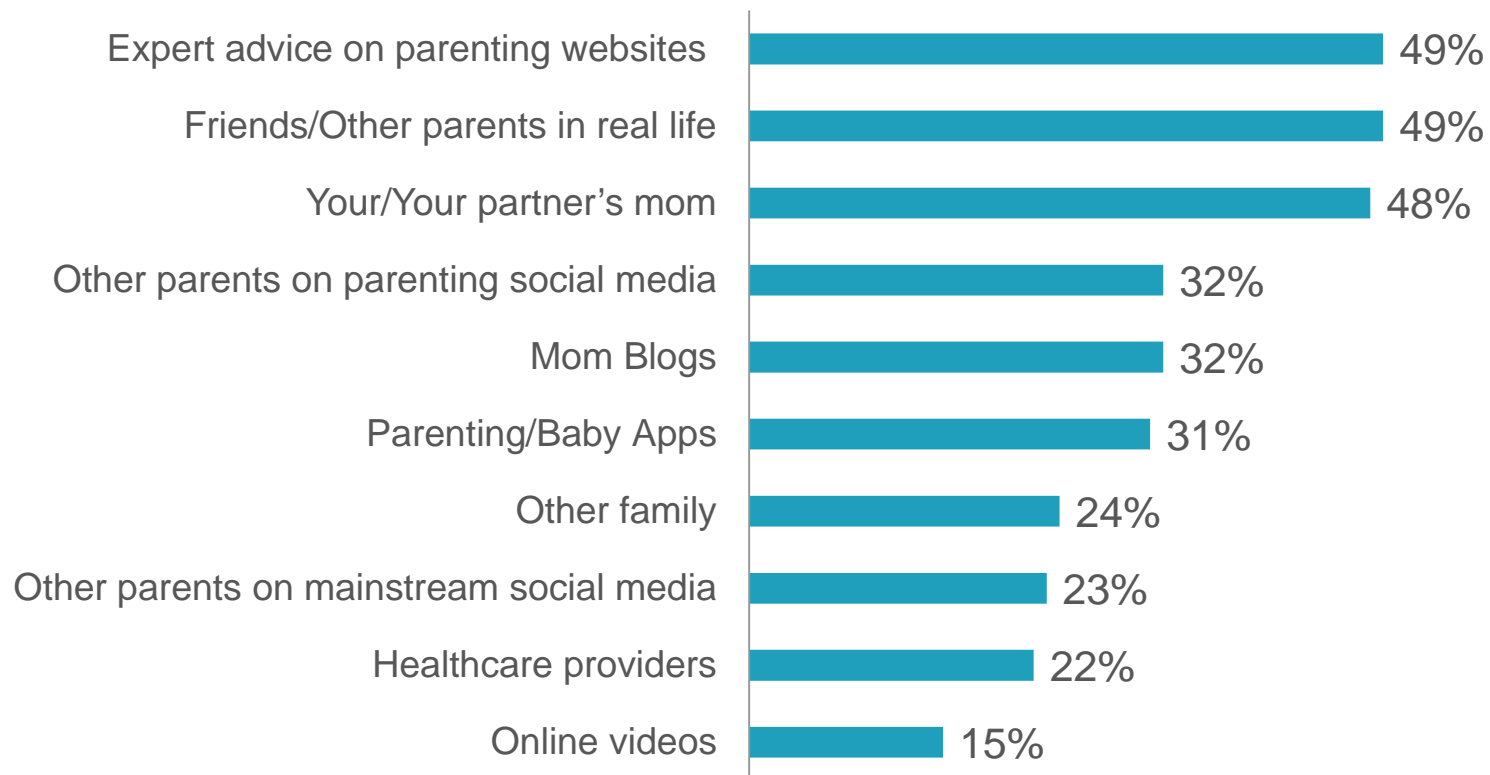
Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

© BabyCenter, LLC. Confidential. All rights reserved.

Ongoing Reliance On Her Digital Toolbox

Q: How often do you use these resources for parenting-related information? (*% using weekly or more often*)

US Millennial Moms



See appendix for all related international data.

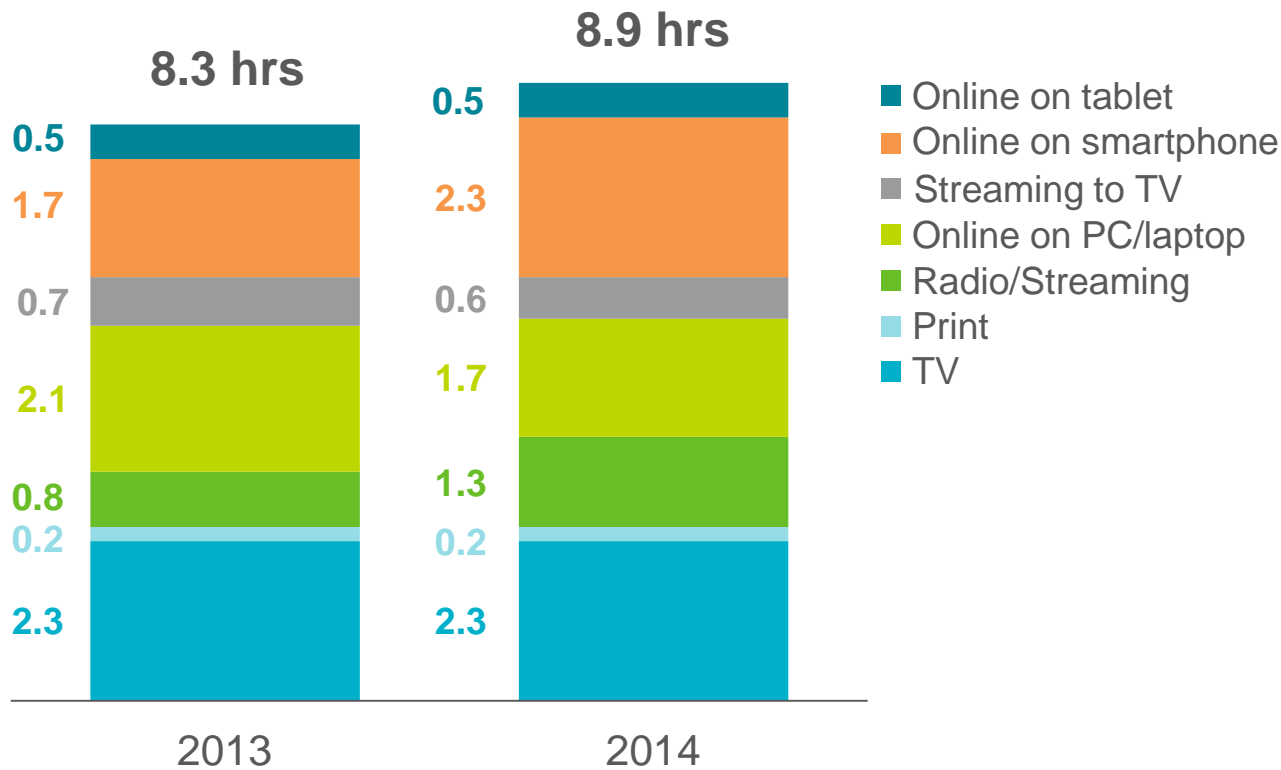
Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

© BabyCenter, LLC. Confidential. All rights reserved.

Millennial Moms Are Spending More Time With Media, Thanks to Mobile

Q: In a typical day, how many hours do you spend with the following media?

US Millennial Moms



US millennial moms spend

35%

more time online on a smartphone than on their PC/laptop

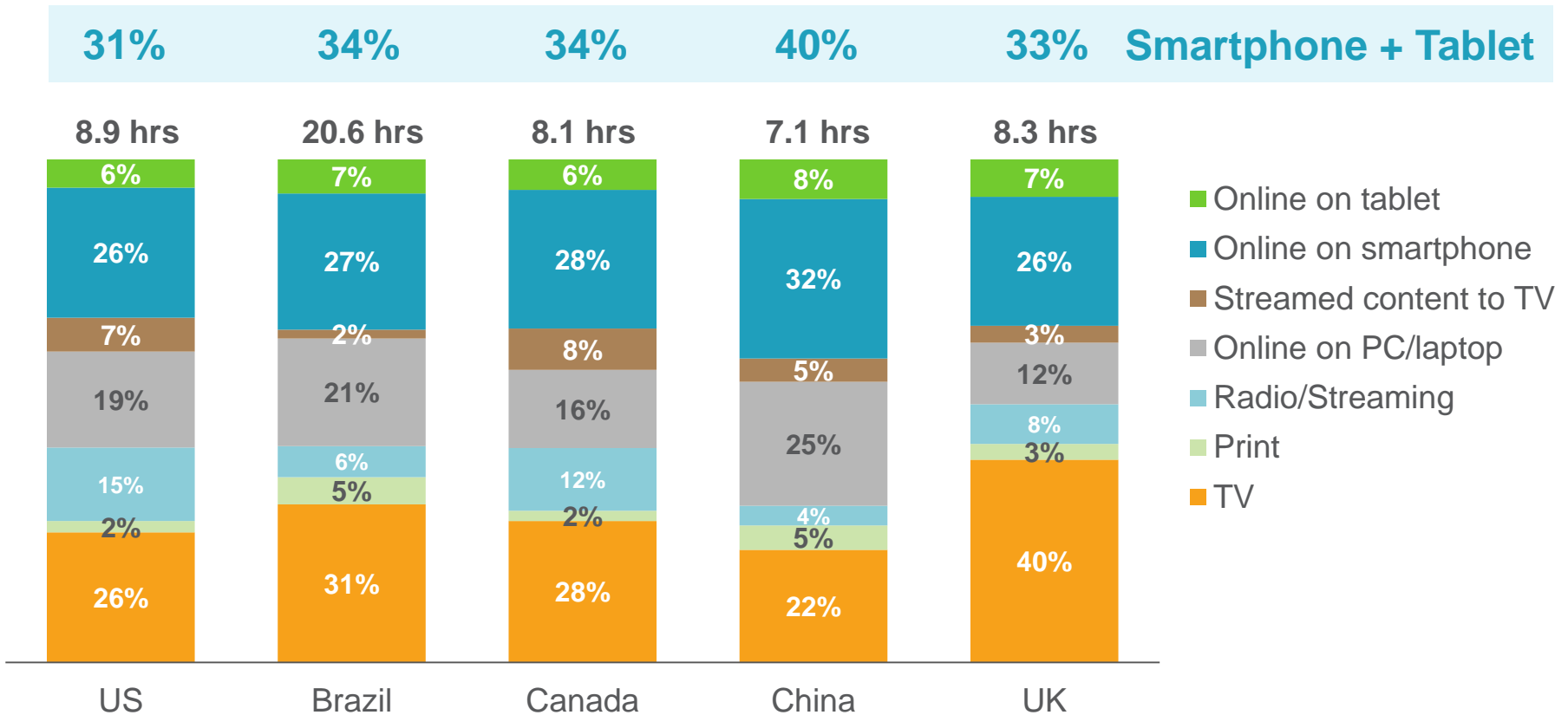
1 in 3

US millennial moms say they use their cable TV subscription less now that they are a mom

Mobile Usage Exceeds TV in Many Countries

Q: In a typical day, how many hours do you spend with these media?

Millennial Moms

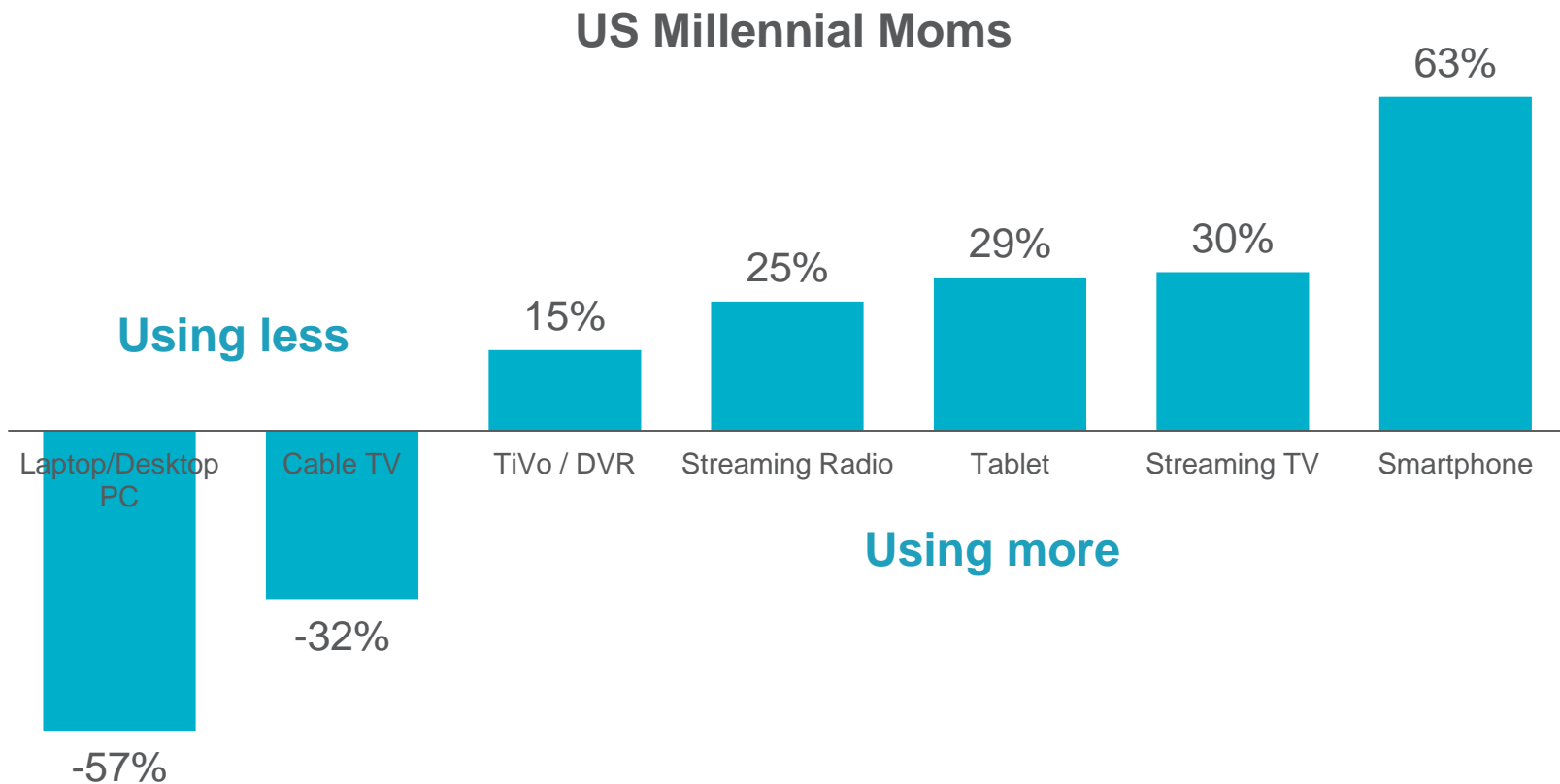


Time spent figures are self-reported and are not de-duplicated; multitasking means moms may use more than one of these media at the same time.

Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

Motherhood Makes Mobility and Time-Shifting Media-Musts

Q: How has your use of each of these changed since becoming pregnant/a mom?



Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

© BabyCenter, LLC. Confidential. All rights reserved.

Multitasking Leads to Cross-Screen Opportunities

Q: Which of the following have you done on your smartphone or tablet while watching TV at home?

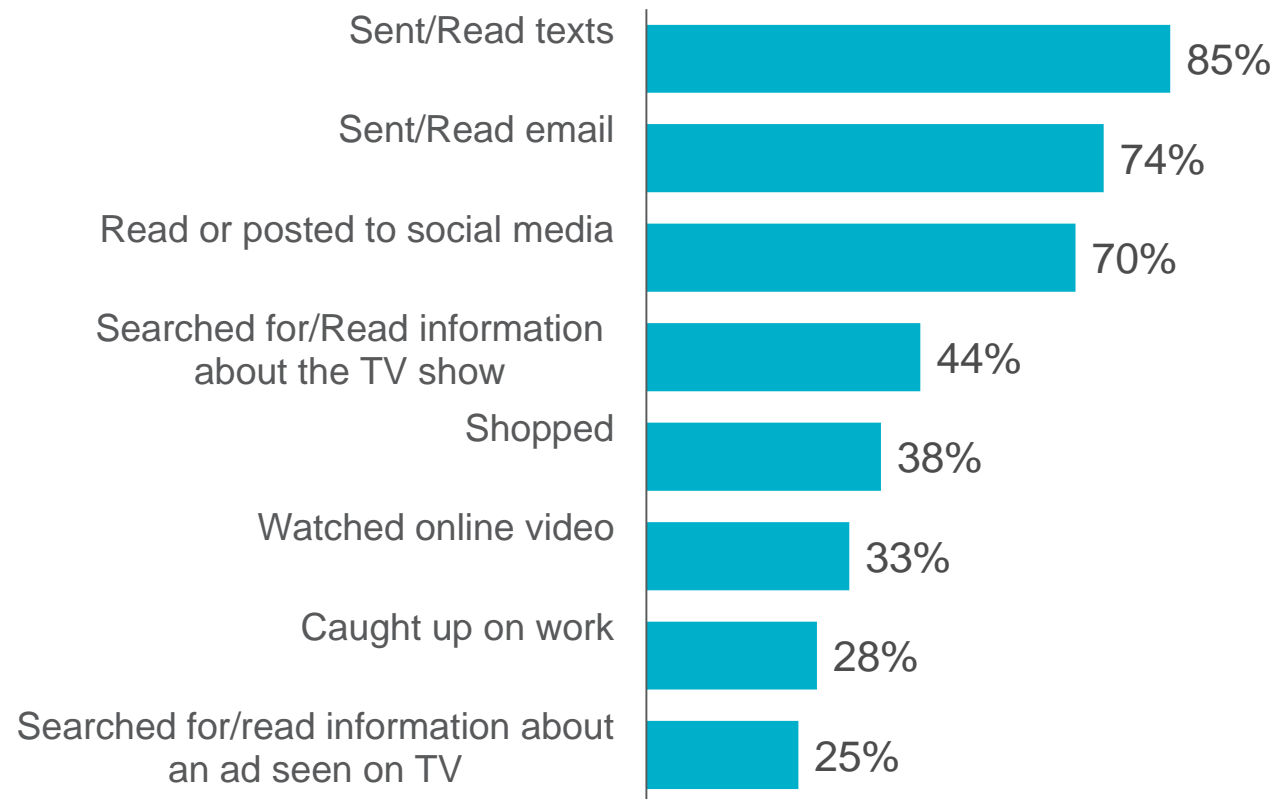
55%

of US millennial moms always/often use their smartphone while also watching TV

25%

of US millennial mom tablet owners always/often use it while watching

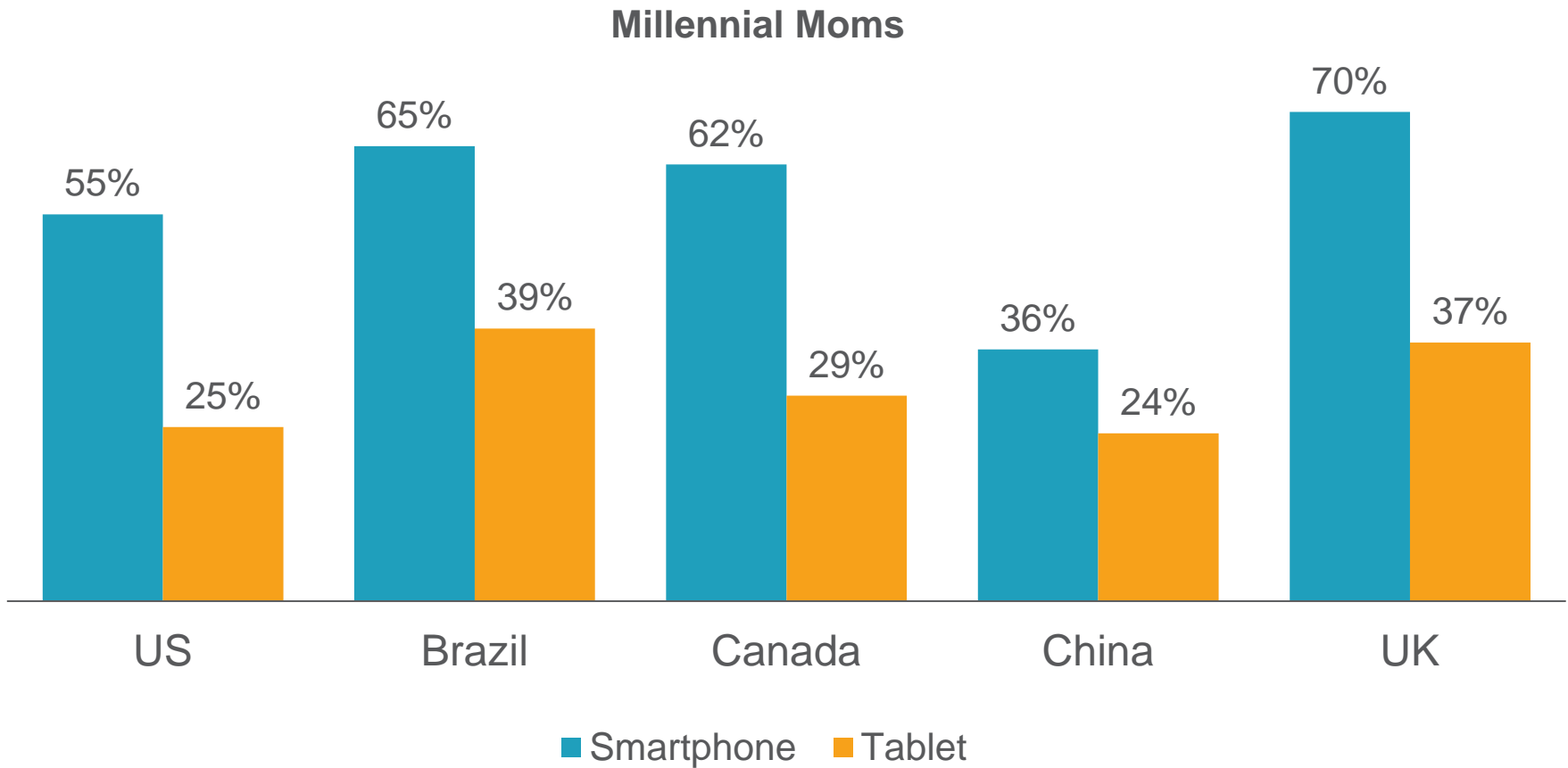
US Millennial Moms



Moms Multitask Around the World

Q: How often do you use your smartphone/tablet while also watching TV?

(% always/often, among smartphone/tablet owners)



See appendix for all related international data.

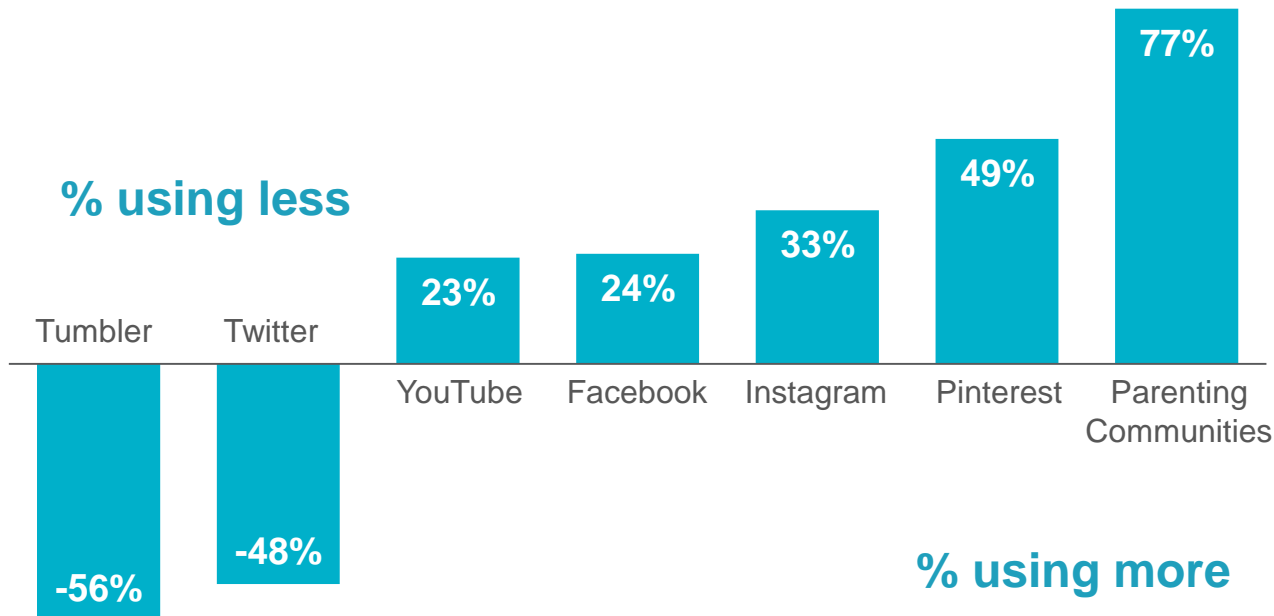
Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

© BabyCenter, LLC. Confidential. All rights reserved.

Her Choices in Social Media Change

Q: Compared to before you became pregnant or a mom, are you using these social sites, more, less, or about the same?
(among those using each platform)

US Millennial Moms

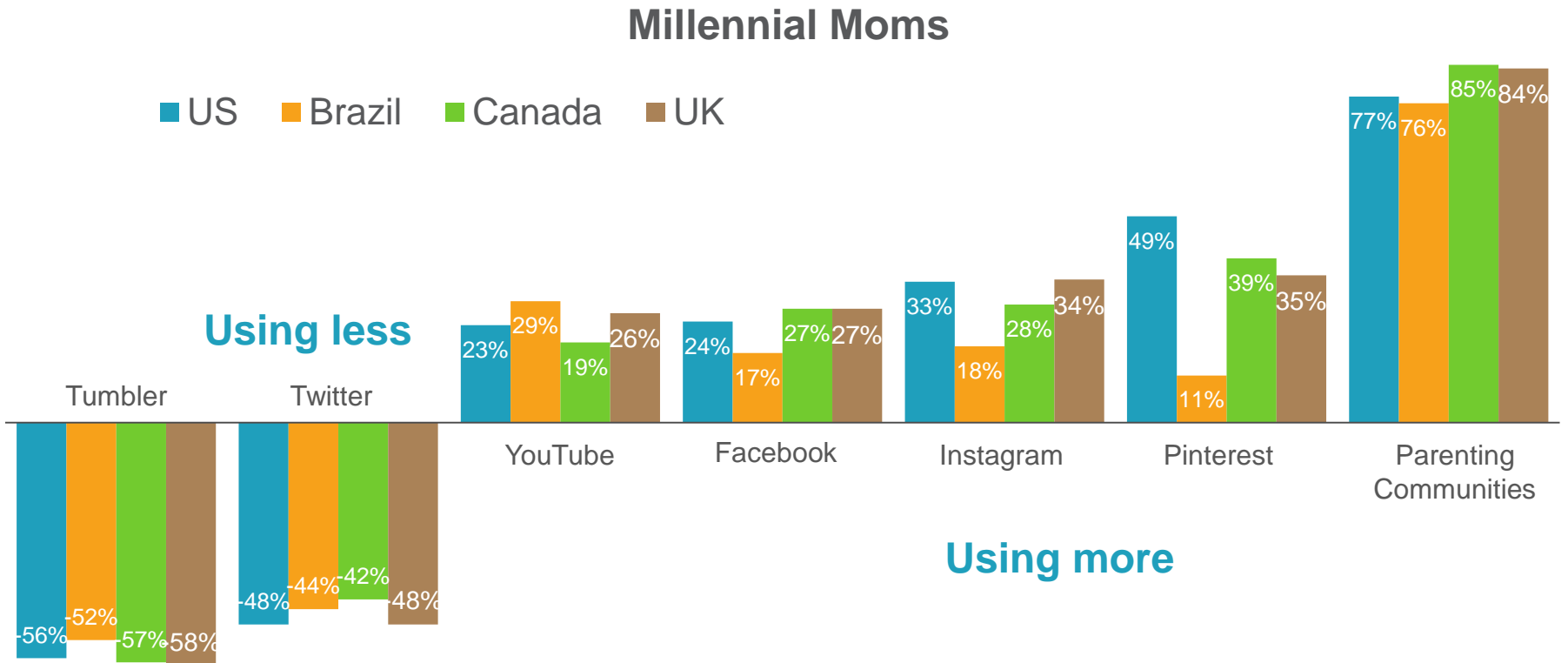


73%

of US millennial moms use parenting communities for brand and product recommendations

Some International Comparisons

Q: Compared to before you became pregnant or a mom, are you using these social sites, more, less, or about the same?



Does not include China social media due to platform differences from other nations surveyed.

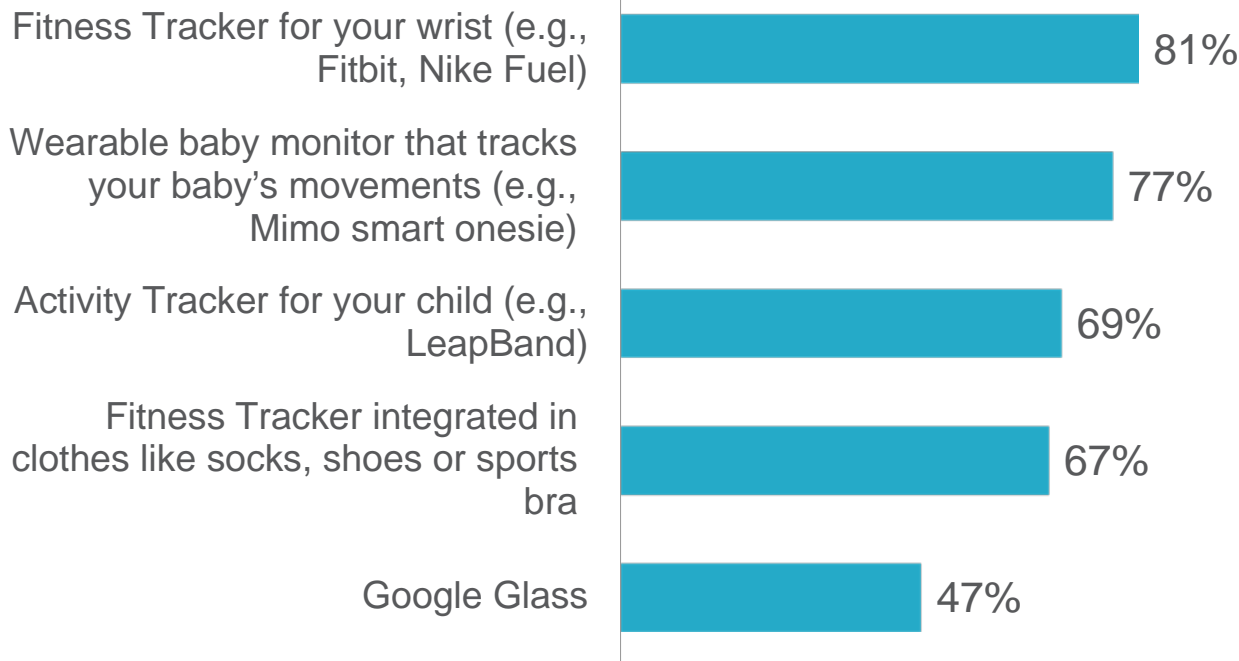
Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

Moms' Embrace of New Technology Extends to Wearables and Health

Q: How interested would you be in the following health / safety products?

US Millennial Moms

% somewhat or very interested



US millennial moms

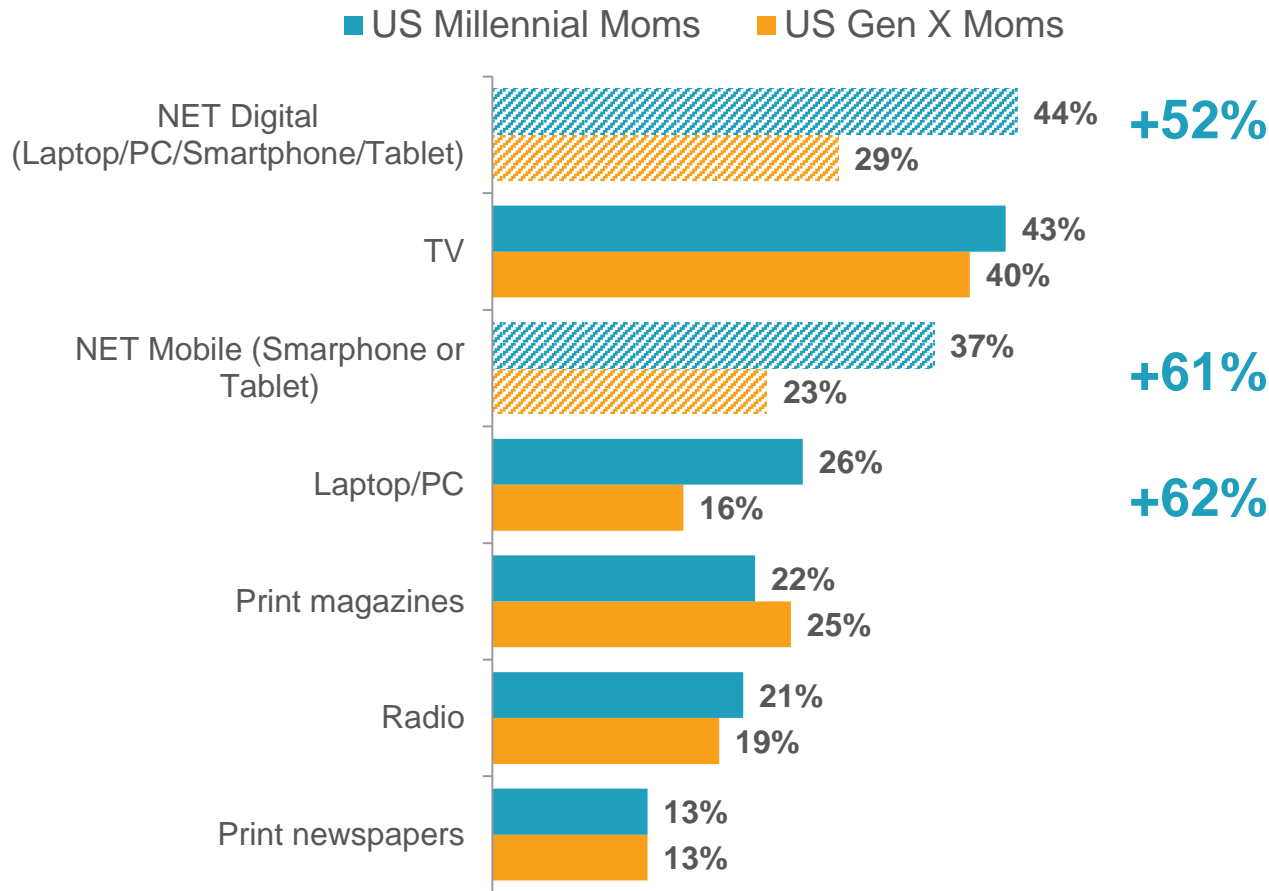
2x

more likely to own a wearable health/fitness tracker than gen pop

Capturing Her Attention

Where She is Likely to Notice Advertising

Q: Where do you frequently notice ads?



70%

of US millennial moms say that now that they are moms they are more likely to skip TV commercials

US millennial moms

15%

less likely to notice ads in print magazines than gen X moms

(frequently or sometimes)

See appendix for all related international data.

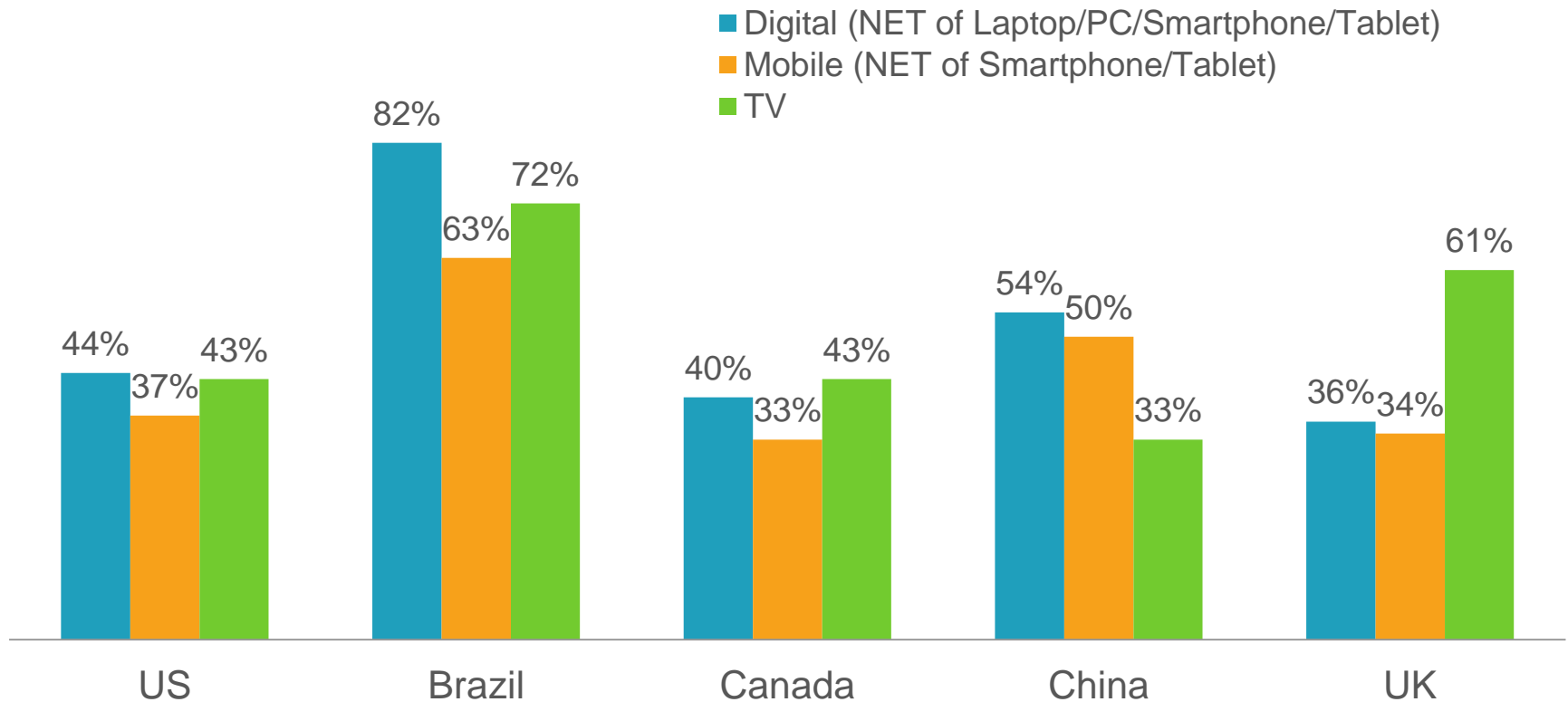
Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

© BabyCenter, LLC. Confidential. All rights reserved.

Digital Ads Get Her Attention

Q: Where do you frequently notice ads?

Millennial Moms



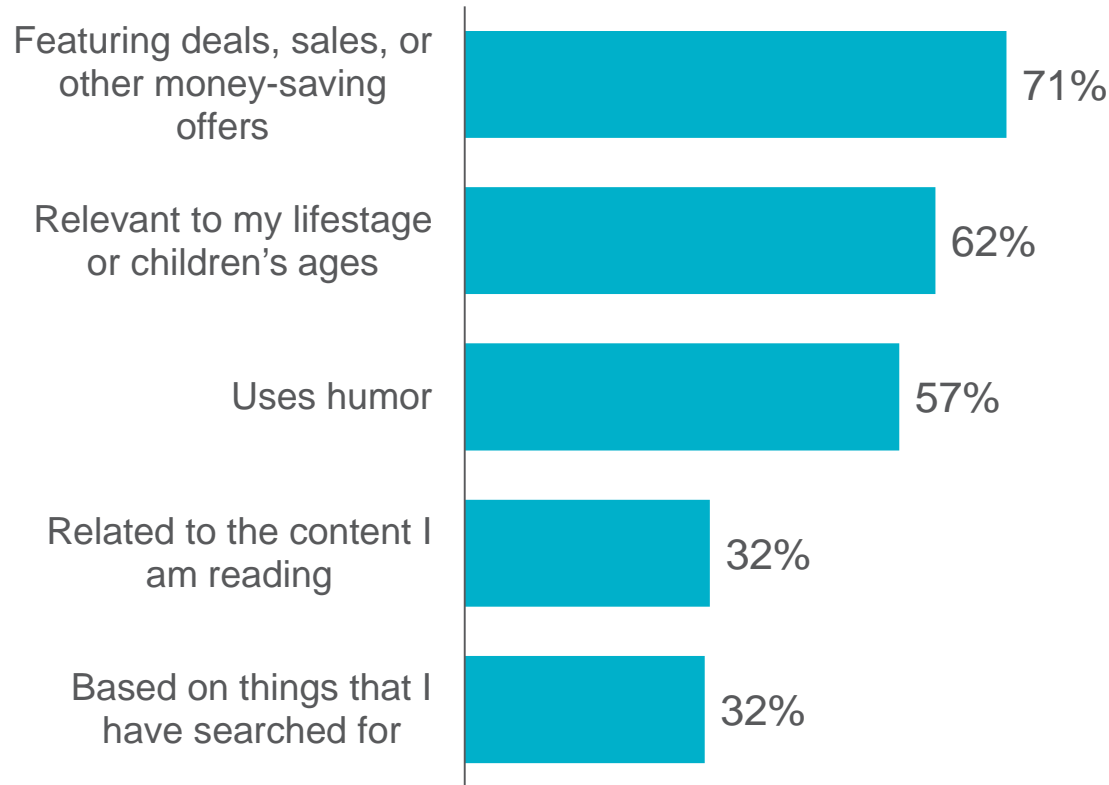
See appendix for all related international data.

Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

Deals and Life Stage Messaging Get Her Attention

Q: Advertisers have different ways of making digital ads noticeable. Which of these ads are most likely to get your attention?

US Millennial Moms



41%

of US first time pregnant women are interested in seeing ads related to items they searched for

See appendix for all related international data.

Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

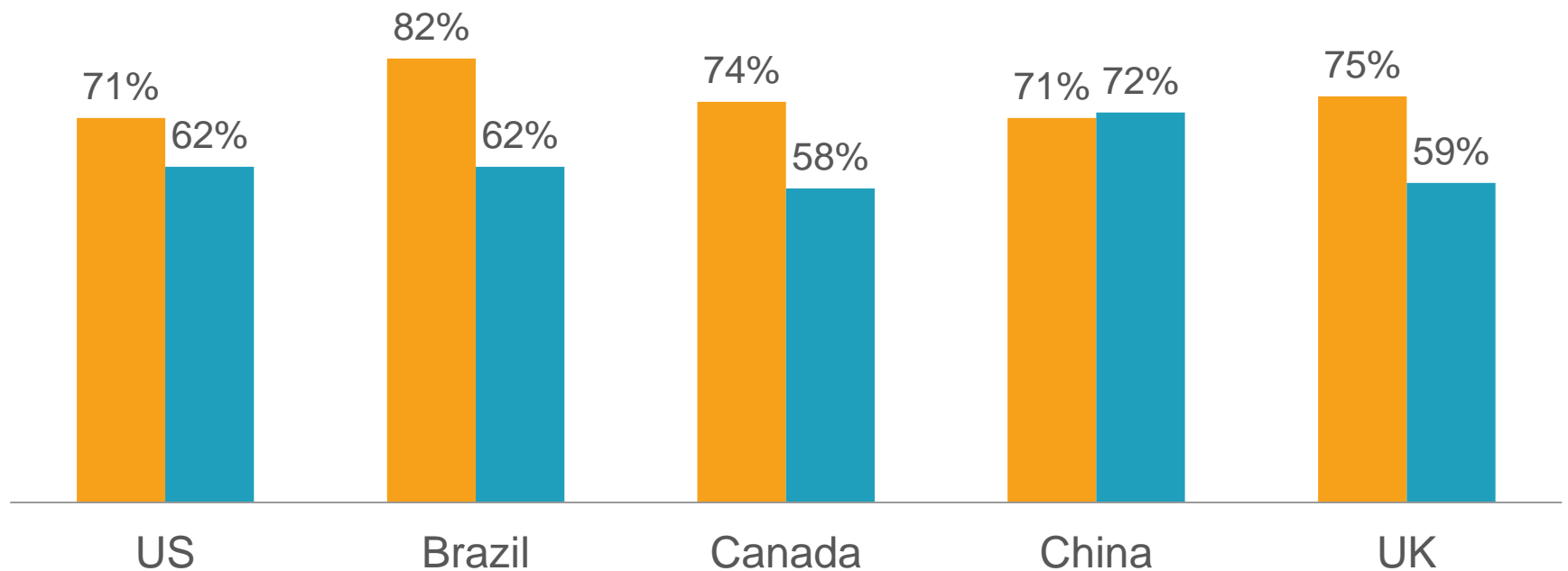
© BabyCenter, LLC. Confidential. All rights reserved.

Some International Comparisons

Q: Advertisers have different ways of making digital ads noticeable. Which of these ads are most likely to get your attention?

Millennial Moms

■ Deals, sales, or other money-saving offers ■ Relevant to my life stage or children's age



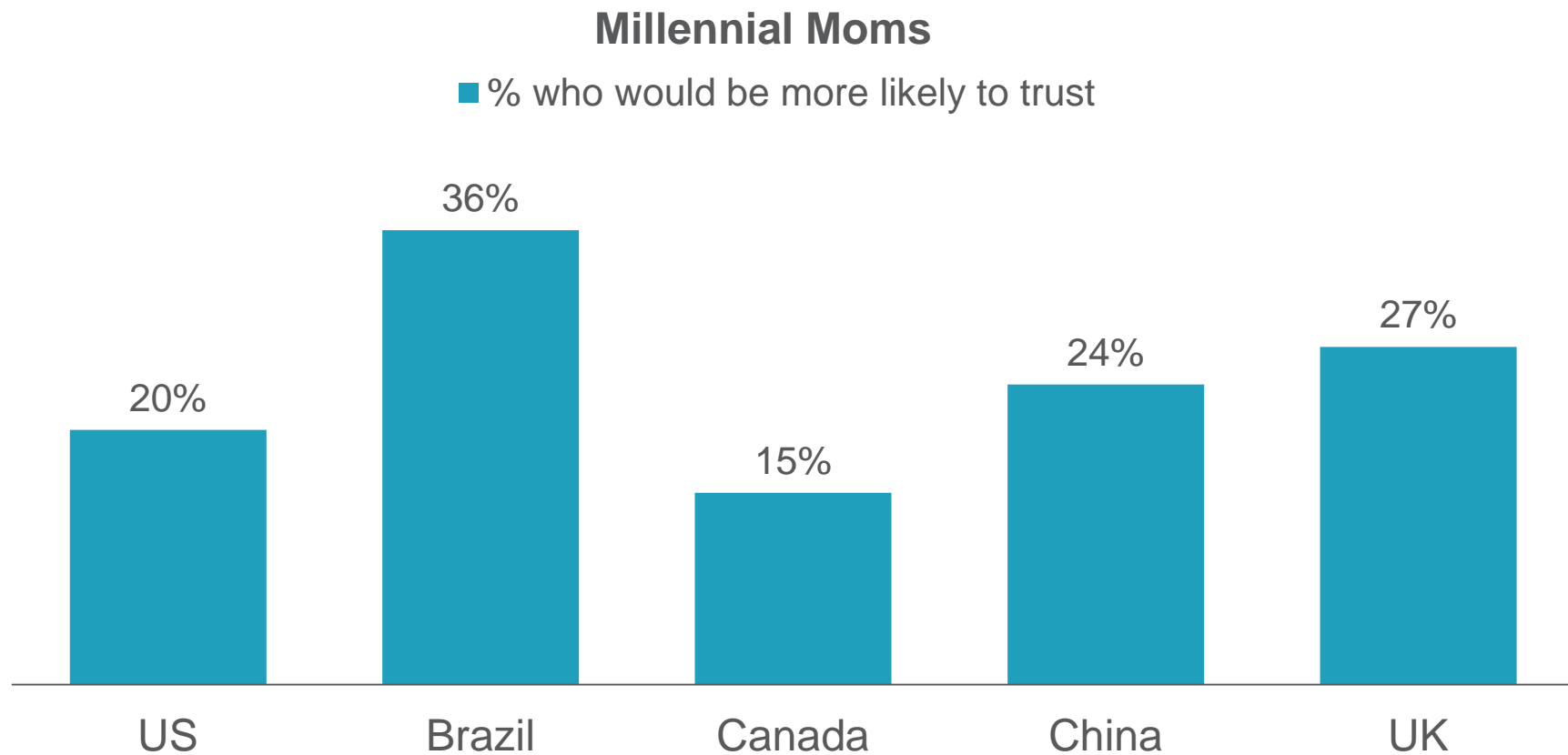
See appendix for all related international data.

Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

© BabyCenter, LLC. Confidential. All rights reserved.

Brand Sponsorship Unlikely to Increase Moms' Trust in Content

Q: How likely are you to trust the article or video, after noticing that it is sponsored by a brand?

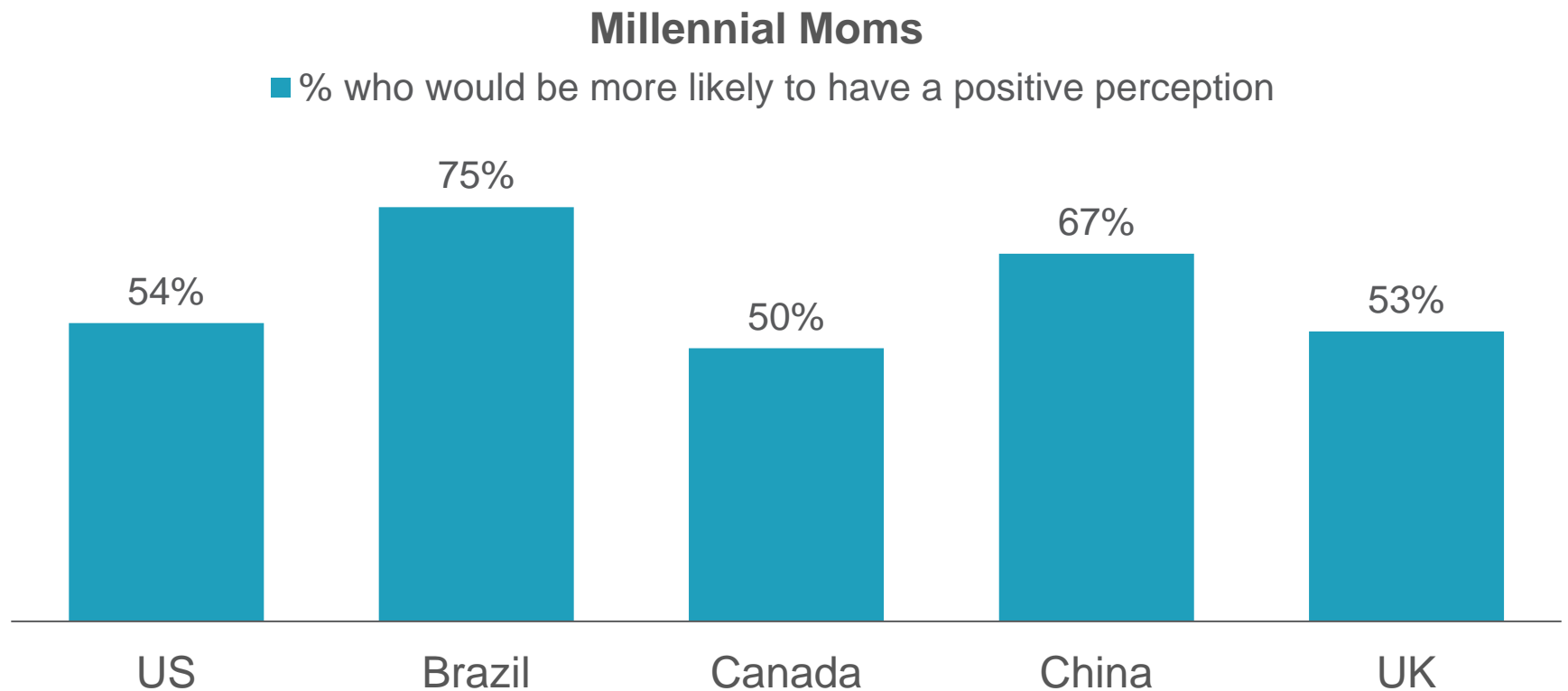


Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

© BabyCenter, LLC. Confidential. All rights reserved.

Quality Content and Videos Improve Brand Perceptions

Q: If the articles or video is well produced and informative, does that improve your perception of the brand?



Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

© BabyCenter, LLC. Confidential. All rights reserved.



What Creative Catches Her Eye

Q: Below are elements that are often featured in digital (online or mobile) ads. Which elements are most likely to get your attention?

US Millennial Moms

59%



Children

19%



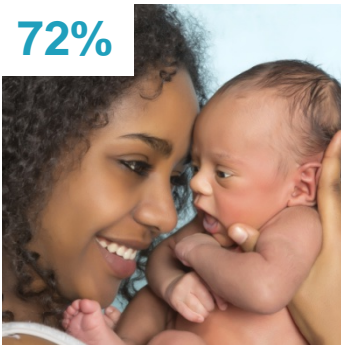
Leading a meeting



20%

Running on the beach

72%



Mom holding baby



76%

Family



77%

Baby

The images here serve as examples. Respondents answered this question without visual prompts.

Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.



What Creative Catches Her Eye

Q: Below are elements that are often featured in digital (online or mobile) ads. Which elements are most likely to get your attention?

Brazilian Millennial Moms

57%



Children

30%



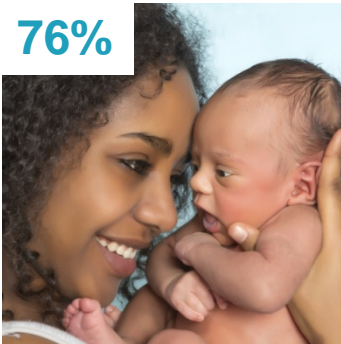
Leading a meeting



12%

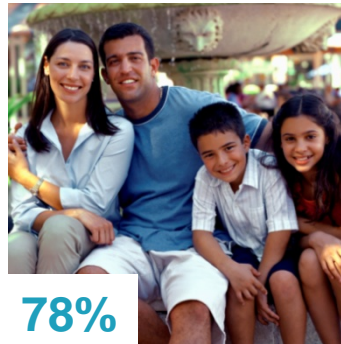
Running on the beach

76%



Mom holding baby

78%



Family

80%



Baby

The images here serve as examples. Respondents answered this question without visual prompts.

Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.



What Creative Catches Her Eye

Q: Below are elements that are often featured in digital (online or mobile) ads. Which elements are most likely to get your attention?

Canadian Millennial Moms



52%

Children



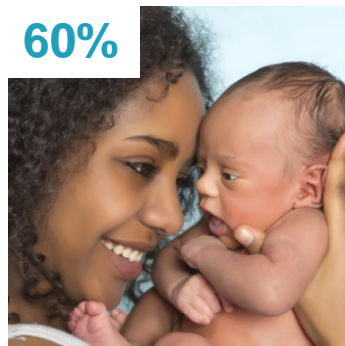
15%

Leading a meeting



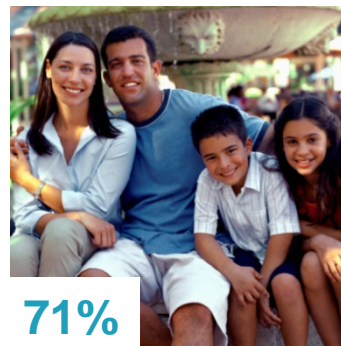
18%

Running on the beach



60%

Mom holding baby



71%

Family



69%

Baby

The images here serve as examples. Respondents answered this question without visual prompts.

Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.



What Creative Catches Her Eye

Q: Below are elements that are often featured in digital (online or mobile) ads. Which elements are most likely to get your attention?

Chinese Millennial Moms

50%



Children

7%



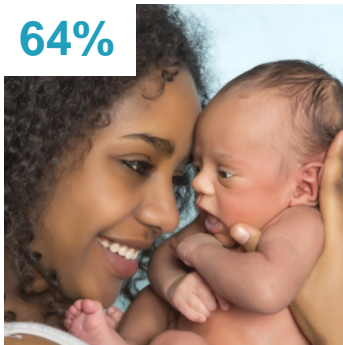
Leading a meeting



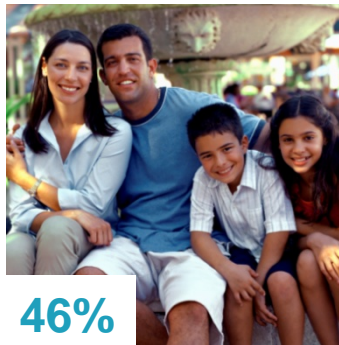
18%

Running on the beach

64%

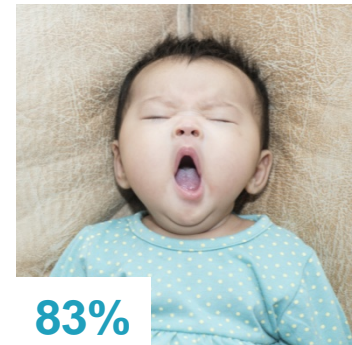


Mom holding baby



46%

Family



83%

Baby

The images here serve as examples. Respondents answered this question without visual prompts

Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.



What Creative Catches Her Eye

Q: Below are elements that are often featured in digital (online or mobile) ads. Which elements are most likely to get your attention?

UK Millennial Moms



45%

Children



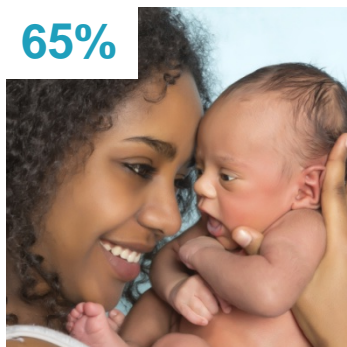
16%

Leading a meeting



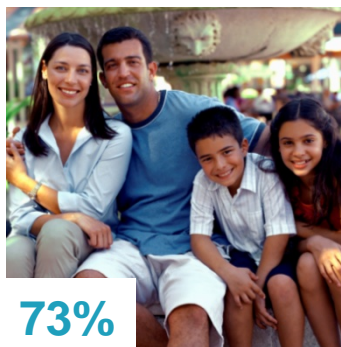
14%

Running on the beach



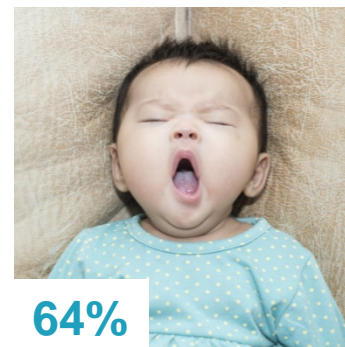
65%

Mom holding baby



73%

Family



64%

Baby

The images here serve as examples. Respondents answered this question without visual prompts.

Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

Key Takeaways

Becoming a mom triggers a total brand re-evaluation and potential brand shift across a wide range of purchase categories, with slight variations between the five countries that are part of this study

US millennial moms are more likely to own smartphones than laptops/PCs, and report spending 35% more time online on their phones

Year-over-year figures clearly show that US millennial moms are spending more time with media overall, due to mobile

Mobile usage by millennial moms outpaces TV in the US, Brazil, Canada and China, nearly reaching parity in the UK

Effective advertising messages and creative vary from country to country

Appendix

Methodology

Qualitative Research

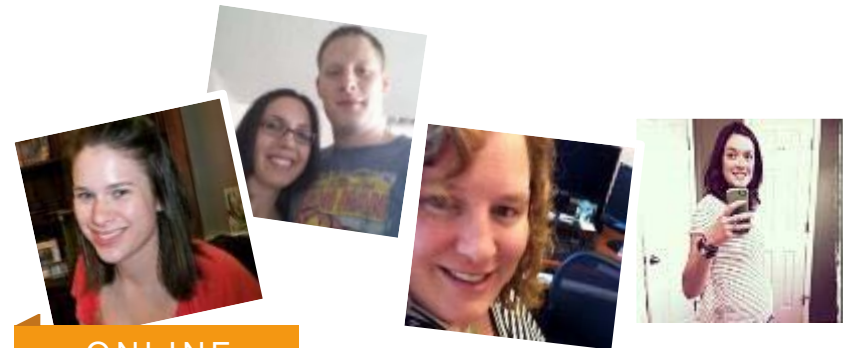


IN-PERSON

Friendship Groups

Moms 21-32 by stage

- 1st time pregnant
- 1st time mom with baby
- Experienced moms, 2+ children
- San Diego & Chicago
- Sept. 2014



ONLINE

Longitudinal Discussion Group

- 7 month journey; from month 6 of pregnancy to baby 3 months old
- First-time expectant moms
- Millennials, age 18 to 32
- 25 moms participated

Methodology

Primary and Secondary Research



In-depth Survey

Global Motherhood survey fielded via BabyCenter's 21st Century Mom[®]

Panels & sites

- 8,118 moms globally:
 - 2,700 US moms
 - Other markets: UK, Canada, Brazil, China, US Hispanic



PewResearchCenter

3rd Party Sources

- Population estimates
- Spending power
- Financial health
- Media habits
- Attitudes and behaviors

Motherhood Shifts Purchasing Criteria

Q: Since becoming pregnant or a mom, has your purchase criteria changed for any of these categories?

Millennial Moms	US	Brazil	Canada	China	UK
Apparel/Accessories/Shoes	41%	51%	49%	34%	32%
Consumer electronics	35%	44%	50%	30%	30%
Financial services	42%	51%	49%	38%	33%
Food/Bev/Groceries	63%	70%	71%	54%	38%
Household Cleansers/Laundry Detergent	52%	61%	58%	51%	38%
Personal Care / Cosmetics	48%	62%	52%	52%	36%

Parenting Resources Differ Around the World

Q: How often do you use these resources for parenting-related information? (*% use weekly or more often*)

Millennial Moms	US	Brazil	Canada	China	UK
Expert advice on parenting websites	49%	76%	56%	60%	58%
Friends/Other parents you know in real life	49%	39%	52%	39%	51%
Your/Your partner's mom	48%	57%	51%	40%	51%
Other parents on parenting social media	32%	64%	53%	27%	39%
Mom Blogs	32%	51%	39%	25%	36%
Parenting/Baby Apps	31%	53%	40%	60%	38%
Other family	24%	30%	23%	17%	24%
Other parents on mainstream social media	23%	36%	28%	31%	26%
Healthcare provider	22%	30%	16%	16%	14%
Books	21%	22%	17%	39%	16%
Online videos	15%	41%	16%	19%	14%
News sites (e.g., HuffPost Parents)	14%	55%	12%	31%	11%
Magazines	10%	18%	6%	17%	6%

Global Technology Trends

Q: Do you own or regularly use the following devices or services?

Millennial Moms	US	Brazil	Canada	China	UK
Laptop or desktop PC	83%	88%	86%	93%	77%
Landline phone	18%	56%	27%	29%	55%
Smartphone	90%	76%	94%	95%	94%
Other mobile phone	11%	26%	6%	12%	10%
Tablet	57%	34%	53%	50%	64%
Cable/Satellite	55%	74%	62%	48%	50%
Gaming console	35%	21%	41%	11%	35%
TiVo or DVR/PVR	29%	7%	31%	28%	29%
Streaming radio	50%	14%	23%	22%	16%
Streaming TV	55%	18%	59%	9%	35%
Internet TV device	18%	9%	16%	28%	14%
Mobile health / Fitness tracker	13%	2%	9%	5%	10%
Home automation (e.g., Nest)	2%	1%	2%	12%	2%

Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

Global Technology Trends

Q: Do you own or regularly use the following devices or services?

Millennial Moms	US	Brazil	Canada	China	UK
Laptop or desktop PC	83%	88%	86%	93%	76%
Landline phone	18%	56%	27%	26%	53%
Smartphone	90%	76%	94%	97%	93%
Other mobile phone	11%	26%	6%	7%	11%
Tablet	57%	34%	53%	51%	66%
Cable/Satellite	55%	74%	61%	47%	49%
Gaming console	35%	21%	41%	9%	35%
TiVo or DVR/PVR	29%	7%	31%	26%	27%
Streaming radio	50%	14%	23%	25%	15%
Streaming TV	55%	18%	59%	7%	36%
Internet TV device	18%	9%	16%	28%	15%
Mobile health / Fitness tracker	13%	2%	9%	5%	9%
Home automation (e.g., Nest)	2%	1%	2%	11%	2%

Source: BabyCenter 21st Century Mom® Insight Series: 2015 State of Modern Motherhood Report, co-sponsored by IAB, February 2015.

Multitasking Leads to Cross-Screen Opportunities

Q: Which of the following have you done on your smartphone or tablet while watching TV at home, in the past 3 months? *(among smartphone/tablet owners)*

Millennial Moms	US	Brazil	Canada	China	UK
Sent/Read texts	85%	60%	90%	60%	89%
Sent/Read email	74%	59%	79%	28%	82%
Family or household related activities (e.g., meal planning)	73%	56%	75%	42%	70%
Read or posted to social media	70%	69%	77%	29%	73%
Browsed the Internet	63%	77%	73%	68%	79%
Searched for/Read information about the TV show that you were watching	44%	38%	49%	38%	56%
Shopped	38%	43%	37%	33%	61%
Played a game	38%	37%	44%	32%	41%
Watched online video	33%	42%	41%	29%	31%
Caught up on work	28%	21%	18%	30%	26%
Searched for/read information about an advertisement that you saw on TV	25%	31%	23%	20%	32%

Where She is Likely to See Brand Advertising

Q: Where do notice ads? (% who say frequently)

Millennial Moms	US	Brazil	Canada	China	UK
Digital (NET of Laptop/PC/Smartphone/Tablet)	44%	82%	40%	54%	36%
Mobile (NET of Smartphone/Tablet)	37%	63%	33%	50%	34%
TV	43%	72%	43%	33%	61%
Smartphone	35%	59%	32%	49%	30%
Laptop/PC	26%	63%	24%	36%	17%
Print magazines	22%	15%	18%	12%	18%
Radio	21%	18%	20%	4%	15%
Tablet	18%	23%	13%	24%	18%
Print newspapers	13%	12%	14%	8%	11%

What Gets Her Attention

Q: Advertisers have different ways of making digital ads noticeable. Which of these ads are most likely to get your attention?

Millennial Moms	US	Brazil	Canada	China	UK
Ads featuring deals, sales, or other money-saving offers	71%	82%	74%	71%	75%
Ads that are relevant to my lifestage or children's ages	62%	62%	58%	72%	59%
Ads that use humor	57%	52%	63%	40%	56%
Ads featuring real moms	57%	60%	53%	52%	59%
Ads that are related to the content I am reading	32%	32%	29%	45%	28%
Ads based on things that I have searched for	32%	30%	30%	41%	29%

About BabyCenter

BabyCenter is the voice of the 21st Century Mom® and modern motherhood. It's the number one pregnancy and parenting digital destination worldwide, reaching more than 40 million moms monthly in 11 languages across 14 owned and operated properties from Australia to India to China. In the United States, 7 in 10 babies born last year were BabyCenter babies. BabyCenter is the world's partner in parenting, providing moms everywhere with trusted advice from hundreds of experts around the globe, friendship with other moms like them, and support that's remarkably right at every stage of their child's development.

BabyCenter also works with some of the world's most prominent brands and institutions to provide life-stage marketing solutions and a direct line to highly engaged moms. BabyCenter established a Global Giving Program and partners with esteemed organizations to help make motherhood safer for all women. BabyCenter is a member of the Johnson & Johnson family of companies.

For more information on this or other BabyCenter 21st Century Mom® research, please email solutions@babycenter.com.

About IAB

The Interactive Advertising Bureau (IAB) empowers the media and marketing industries to thrive in the digital economy. It is comprised of more than 650 leading media and technology companies that are responsible for selling, delivering, and optimizing digital advertising or marketing campaigns. Together, they account for 86 percent of online advertising in the United States. Working with its member companies, the IAB evaluates and recommends standards and practices and fields critical research on interactive advertising. The organization is committed to professional development, elevating the knowledge, skills, and expertise of individuals across the digital marketing industry. The IAB also educates marketers, agencies, media companies and the wider business community about the value of interactive advertising. Founded in 1996, the IAB is headquartered in New York City.

For more information on this or other IAB mobile research, please email mobile@iab.net