

The Digital Lives of Power Moms



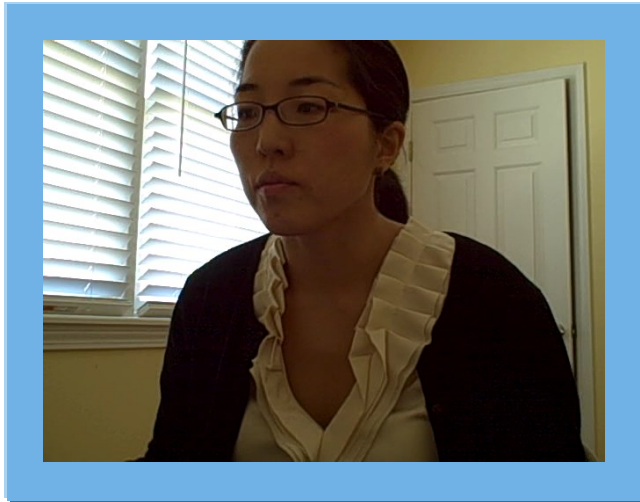
May 27, 2009

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Karen Benezra, Vice President, Nielsen Life360



Nielsen “Momtage” Footage.....



[Click here to view “Momtage” video footage](#)

Key Findings

- Nielsen's Focus on Key Segments
- About Consumer Generated Media
- Our Methodology & Framework
- Key Learning
 - By the numbers
 - By the voices
- Key Observations & What's Next
- Q & A

Nielsen & Understanding Key Segments

- In the digital/social media age, certain key segments are disproportionately shaping the consumer and shopper landscape
- Nielsen is focusing efforts on deeper dives into mission critical segments
- Moms are a critical initial focus area, with an emphasis on degrees of influence informed by a host of variables, including qualitative
- We will be launching products and consulting services around the insights and learning we'll be sharing with you.



First, the high view: Moms & CGM



Consumer-Generated Media (CGM) n.

“High-impact media generated by consumers, typically informed by relevant product or service experience. Commonly archived online for ready access by other consumers or key marketplace influencers -- e.g. media, analysts.”

Synonym: Word-of-Mouth (WOM)

Social media

From Wikipedia, the free encyclopedia



Social media are primarily Internet- and mobile-based tools for sharing and discussing information among human beings.^[1] The term most often refers to

Paid Media

Media Planning

Earned Media

Power Moms research flow

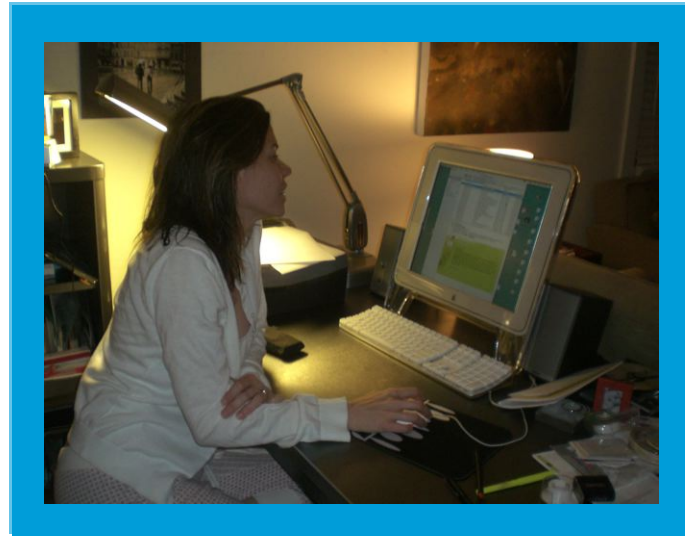
Step 1
Online analysis

Step 2
Respondent
selection

Step 3
Video Journals

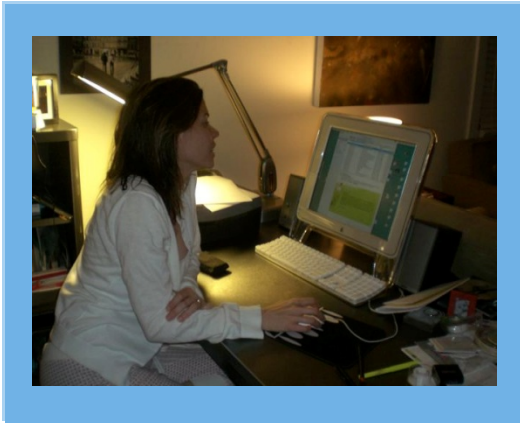
Step 4
E-Journals, feedback

Step 5
Interpretation
Analysis



Power Moms research flow

Step 1 Online analysis



- Develop mom blogger segment based upon existing categorization / tagging of mom / parenting bloggers (currently ~12k and growing)
- Mine aggregate conversation (blog posts) for emergent themes of discussion
- Identify key blogger genres and leading voices
 - Single author blogs, large communities, socials nets
- For two segments (skew younger, fewer children and older age skew, more kids) of online moms:
 - Site visitation and social media behavioral profiling
 - Online mobile media
 - Video consumption

Moms satisfy diverse needs online from meal planning, shopping, even connecting



Top Visited Sites F 21-34, Kids aged 2-11		Top Visited Sites F 35+, Kids aged 12-17	
About.com Health	403	SparkPeople	394
Target	265	Kraft Food & Cooking	324
Wal-Mart Stores	251	MyCheckFree	299
iVillage Network	240	CVS/pharmacy	293
webMD	228	Kraft Foods	292
Everyday Health Network	196	Vistaprint	286
Disney Online	187	LivePerson	260
Blogger	186	QVC	259

CEO Moms are getting into the social media mix – they make time to Tweet



Social Media F 21-34, Kids aged 2-11		Social Media F 35+, Kids aged 12-17	
Blogger	186	Classmates Online	173
MySpace	155	LinkedIn	159
Facebook	145	MySpace	140
		Blogger	133
		Facebook	133
		WordPress	130
		Twitter	122



Newbie Moms are hyper connectors

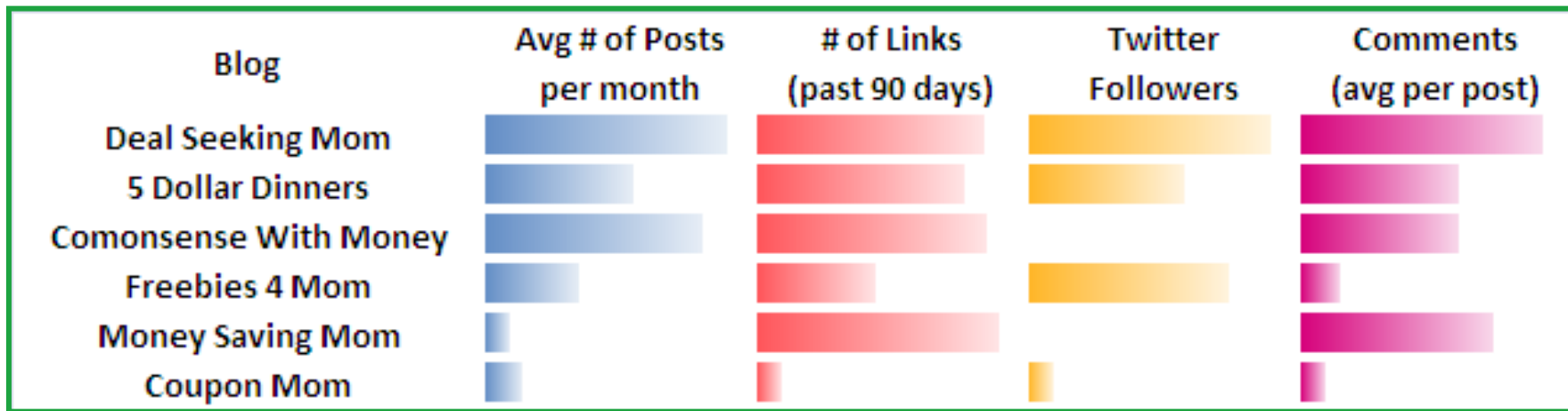


Activity	Female Index	CEO Mom	Newbie Mom
Visited Social Network Site	119	122	286
Publish / Own Blog	109	123	270
One+ Social Networking Profiles	101	102	184
Visited Blogging Site	92	122	235
Visited Both Blogging and Social Networking Site	98	110	262

What are Power Moms blogging about?



Savvy Spenders



COMMON SENSE WITH MONEY
BETTER LIVING THROUGH WISER SPENDING



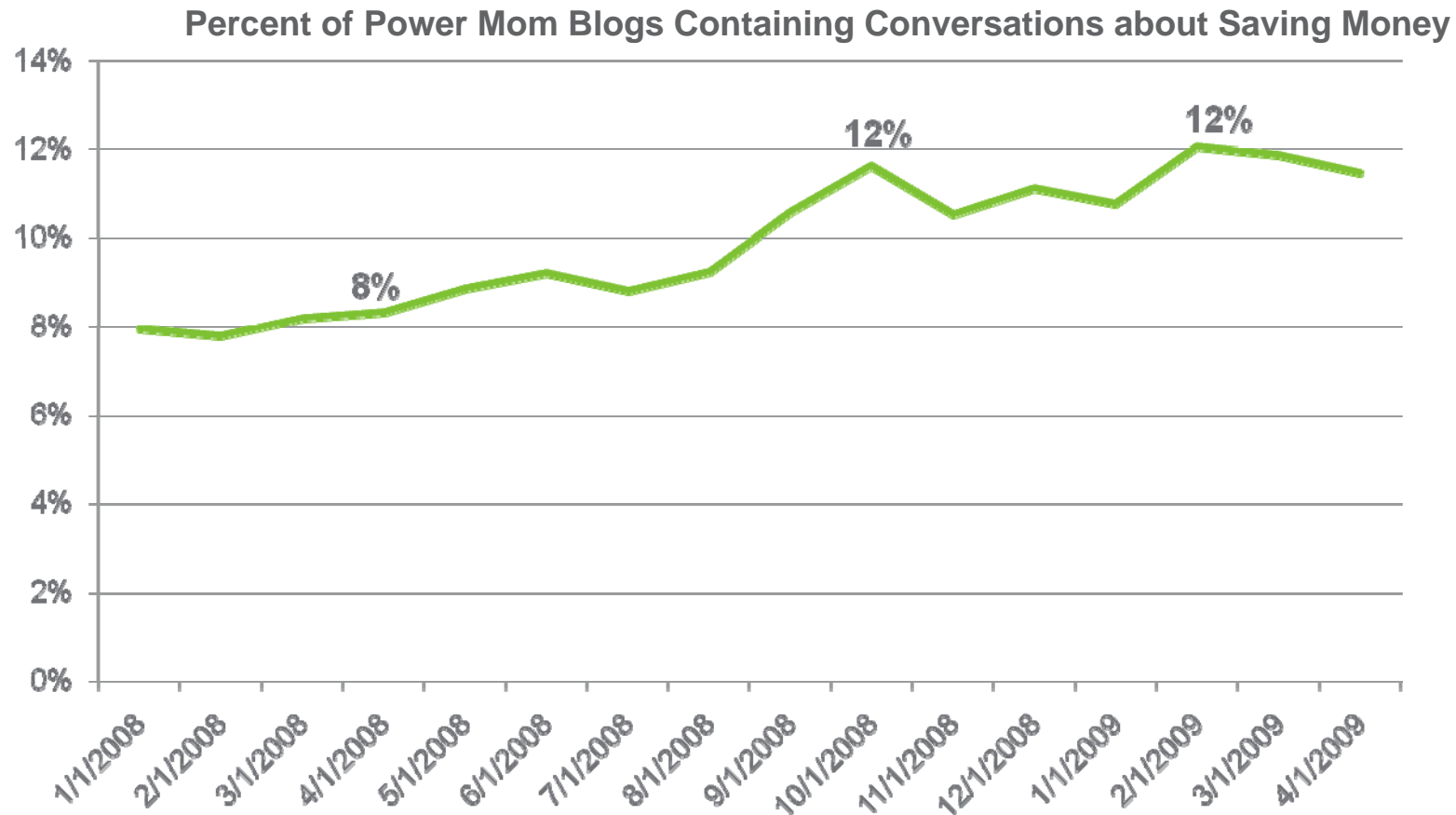
CouponMom.com
the easiest way to save



Freebies 4 Mom.com

MONEY SAVING Mom.com

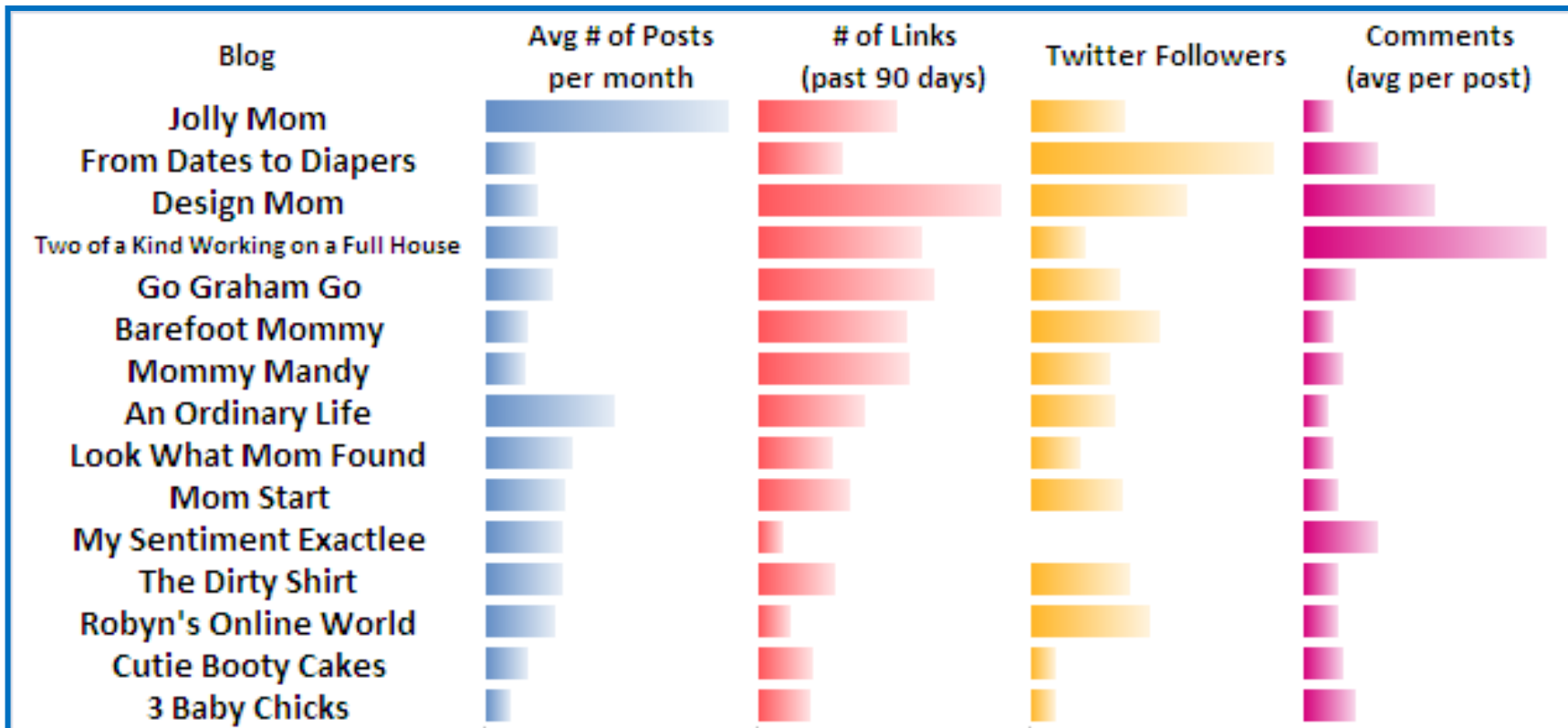
Moms leverage the power of community to get money saving strategies



Mom blogs are a burgeoning platform for sampling, trial and reviews



Mom Approved



Power Moms are not all SAHMs
(*stay at home moms*) who sit at the
computer all day long



Mobile devices enable moms to multi-task on the go



Media Penetration Indexing of Select Demographic Groups

Audience in (000's)

Mobile Media Vehicle	All Subs Index	All Subs Audience	Female Subs Index	Female Subs Audience	Mom's 25-45 Index	Mom's 25-45 Audience
Text Messaging/SMS	100	127,163	107	70,481	135	22,476
Messaging/MMS	100	63,870	112	37,105	127	12,378
Mobile Internet	100	43,401	84	18,964	107	6,683
App/Software Downloads	100	27,438	77	10,884	100	3,904
Game downloads	100	23,033	88	10,533	116	3,8427
Full track music downloads	100	13,164	88	6,184	115	2,244
Video/Mobile TV	100	12,195	71	44,268	101	1,763

They use mobile devices to keep up with email and engage in search



Top 15 Mobile Internet Sites Among Mothers 25-45
Audience in (000's)

Yahoo's mobile sites are popular among mothers 25-45

Mobile Internet Site	Total Unique Audience (000)	Moms 25-45 Unique Audience (000)
Yahoo! Mail	15,983	2,613
Google Search	12,263	1,531
MySpace.com	10,879	1,195
MSN Hotmail	7,935	1,163
Gmail	7,753	1,095
Google Maps	6,470	929
CNN	6,173	768
Yahoo Search	5,693	680
Yahoo Entertainment	4,749	673
iTunes	4,729	654
Yahoo Weather	4,410	653
AOL Mail	4,343	625
eBay	3,984	567
Yahoo Games	3,969	554
Yahoo News	3,186	549
Mapquest	3,048	527

Video is the next frontier



Top 10 Online Destinations for Power Moms			
Women 25-54 with at least one child in the household			
Site	Unique Viewer Composition Percent	Unique Viewers	Unique Viewer Index
PBS Kids	24.5	241,000	239
Noggin	22.2	121,000	217
NickJr	21.7	492,000	212
Playhouse Disney	20.7	199,000	201
Kohl's	18.3	203,000	178
Disney.com	17.8	710,000	174
PBS	17.4	125,000	169
DisneyChannel.com	17.2	689,000	168
Disney Records	16.7	155,000	163
Nick	16.2	415,000	158

How a little device is making a BIG impact?



Mom “vloggers” are popping up everywhere



newbaby.com

Where Moms Learn, Share and
Create Memories with Video

MOM TV
part of the NewBaby.com Family

Video is a fresh, authentic way to capture what's important to moms



JNJ BTW
a three dimensional view of
Johnson+Johnson

Calling Mommy Vloggers

May 20th, 2009

I wanted to share an interesting idea we've initiated on the Johnson & Johnson health channel. It's a series we call "Real Moms."

I've invited Mommy Vloggers to submit videos on topics relevant to them, and which might be helpful to a larger audience.

So far, I've received videos on safety tips for toddlers, how to make homemade baby food, and teaching your kids to be ecologically friendly. They don't have to be perfect — most have been made on a flip cam — and I do post most of the videos sent to me, as long as they don't reference specific products. To compensate the vloggers I pay \$100 for each video used.

One of my favorites was done by Colleen Padilla (*Classy Mommy*) on tips about how to keep from going stir crazy with your kids when stuck inside during bad weather.

I'm always looking for more content, so if you are interested, just let me know by clicking "send message" on the Johnson & Johnson health channel.

Power Moms: Attitudes and Behaviors

Step 2
Respondent
selection

Step 3
Video Journals

Step 4
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Step 5
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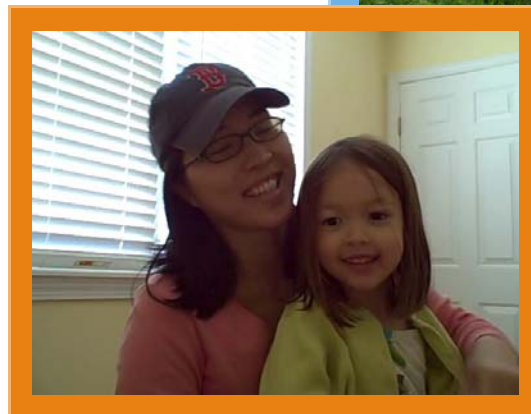
- Equipped select respondents with video cameras
- Tracked their interactions with social media, devices and technology several times daily for one week (focus on shopping, work, childcare, networks)
- E-Journals provided deeper insights into tech usage, as well as attitudes and frustrations about current habits and “what’s missing”



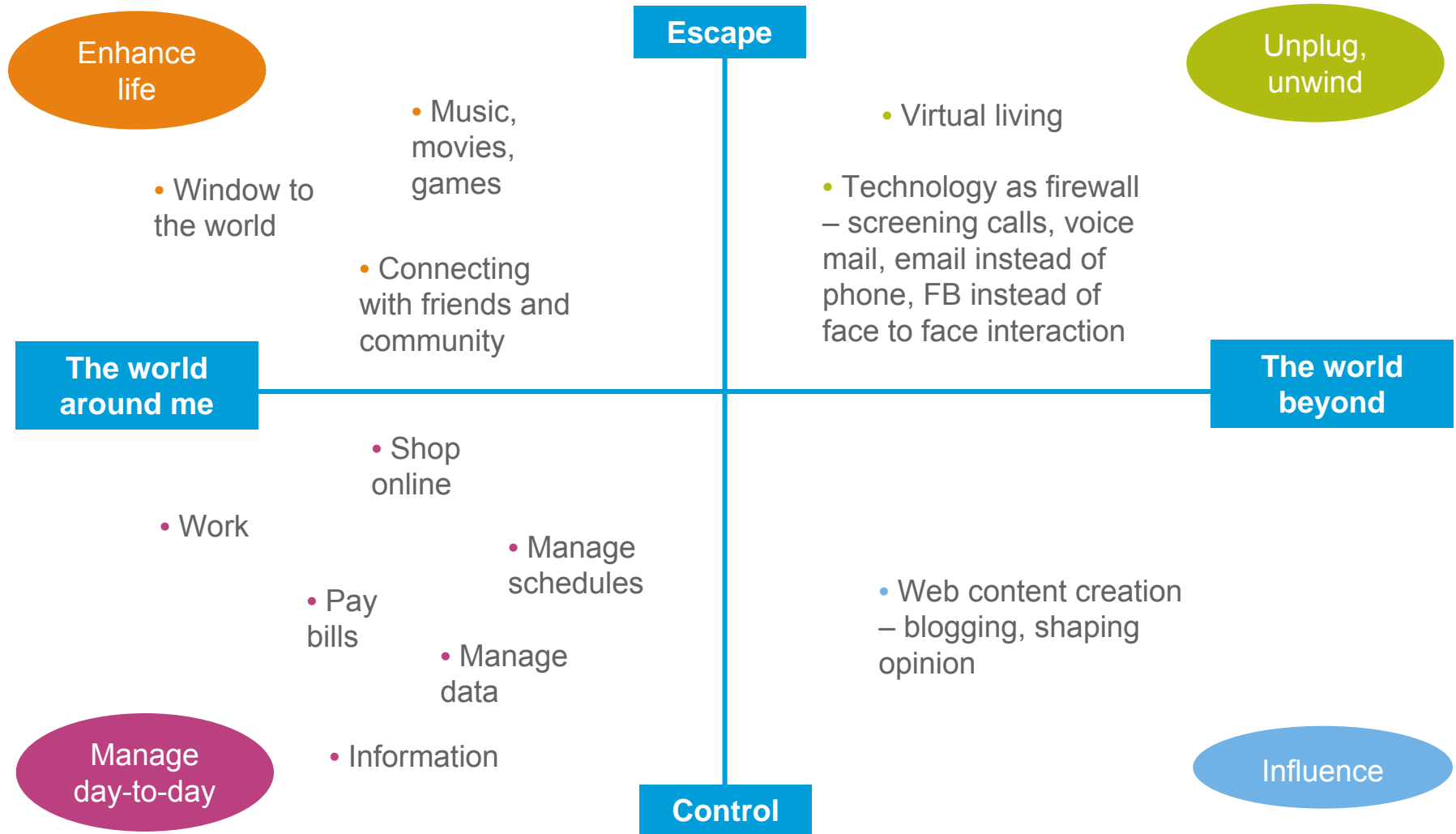
A day in the digital life ... in her own words

- What does a typical day look like?
- What daily trials do Power Moms experience?
- How does technology help them manage it all?
- Key factors in the home environment:
 - Spouse/Partner
 - Kids (ages)
 - Work/life balance
 - Geography and proximity to extended family

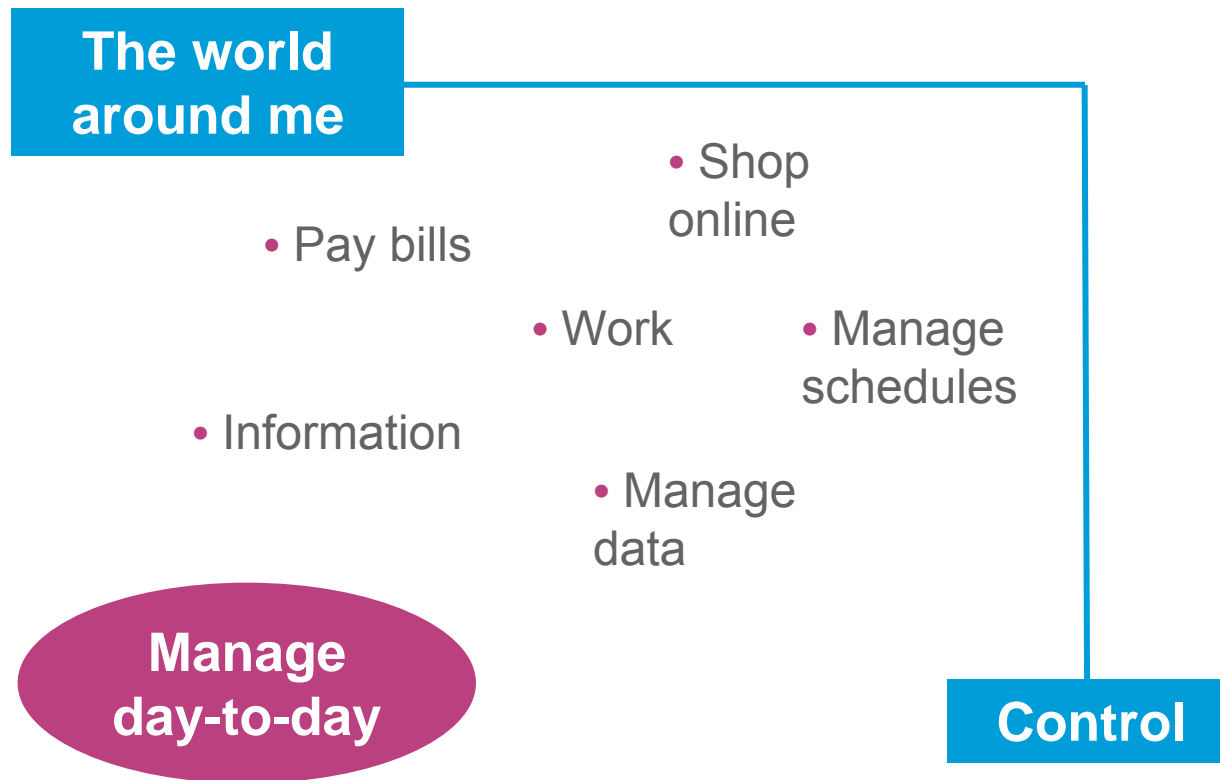
[Click here for video footage](#)



Technology plays a variety of roles



Technology as a Swiss Army knife for moms



Information at their fingertips

“ I love that I have access to any information I need when I need it. It's crippling at times to be out of town and not be able to access the information you need. [Now that my husband has an iPhone, I imagine we'll most often always be connected.](#) I love that I can do research on any product (home or work) and access the information immediately. ”

“ We are trying to figure out where we might go this summer after school lets out. ... All of that [coordination whether it be our work schedules or trip planning happens on both our cell phones as well as the computer.](#) ”

“ I use the internet for shopping, comparing product reviews, checking out headlines, checking out the weather forecast, getting recipes, and answering general questions: like [Where exactly is Dubai? How do I get wax out of carpet? What time does the pharmacy close tonight? How can I keep my dog off of my sofa?](#) ”

Shopping, saving and swapping

“ I’ve been researching cloth diapers vs. disposables and recommendations about the latest baby gear and swapping out used baby clothing with other mothers. ... I shop online out of convenience and sometimes out of necessity. Some days it is hard to get out and about like when I have a sick kid, or the weather is bad, or I’m waiting for a delivery. ”

“ I usually go online to look up products I’m interested in buying. For example, we bought a small hand-held vacuum last night and I had looked at different consumer remarks about several options. We ended up with a brand that got favorable reviews. ”

[Click here for video footage](#)

More opportunities for work that's portable

“ I am a graphic designer and own my own business. All of the projects I currently have for clients in other states is sent through PDFs via email. PDFs, the internet and my computer have enabled me to help support my family. About 2 years ago I realized I was going crazy trying to work from home, micro-managing a therapy team for my child, cook, clean, etc. It was impossible to stay away from the distractions...I can remember (when) I worked from home that I really wanted to get out of my house at the end of the day. Now that I work AWAY from home, I'm so happy to return back to my house. ”

“ I also keep up with current issues in my career through a local chapter of my professional organization that meets 1x/month. I haven't been to a meeting in several months, but I keep up via the email listserve and the website. ”

Technology offers time management while bridging to the world at large

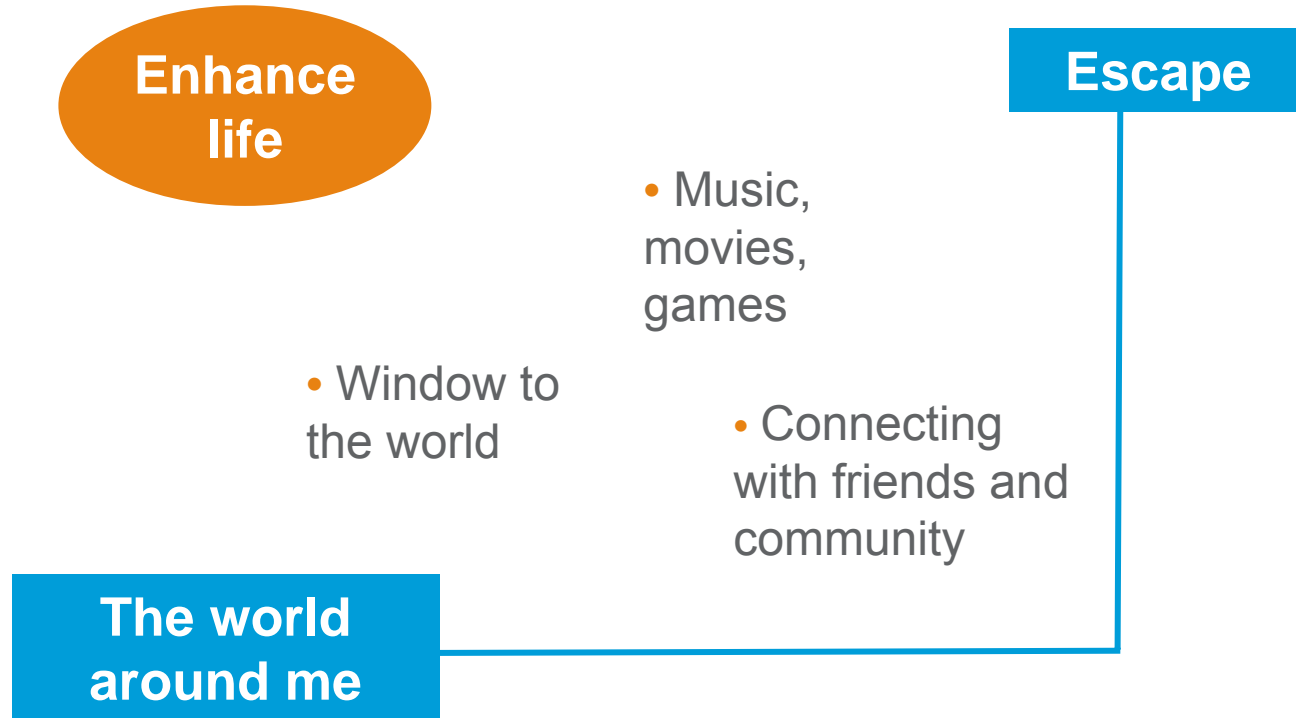


“ If there were a TV show made about my life, it would probably be a comedy. The plot would be to see how much I could get done in one day with four kids hanging on my heels and climbing the mountains of laundry to find my phone!



I love being able to stay home — and I think the Internet makes that possible for me somehow. I can be at home without feeling isolated as I'm sure our moms and grandmothers felt. ”

Enhancing an already full life, digital apps are a version of “me” time



Twitter, Facebook: Connecting virtually with the world at large

“ I’m on Twitter all the time. I love it. It’s great to connect with people ... and read blog posts and articles I might not have otherwise come across on my own. I add blogs to my reader all the time even though it is taking me longer to get around to reading them. We used Facebook for our National Mom’s Nite Out party, to track RSVP’s, post sponsor logos and keep guests updated. ”



Creating community with friends, neighbors

“ I head up a mom’s group that meets a few times each month in the evenings. I email out invites with info on what we’ll be doing. We make our own soaps and just have fun getting together. ”



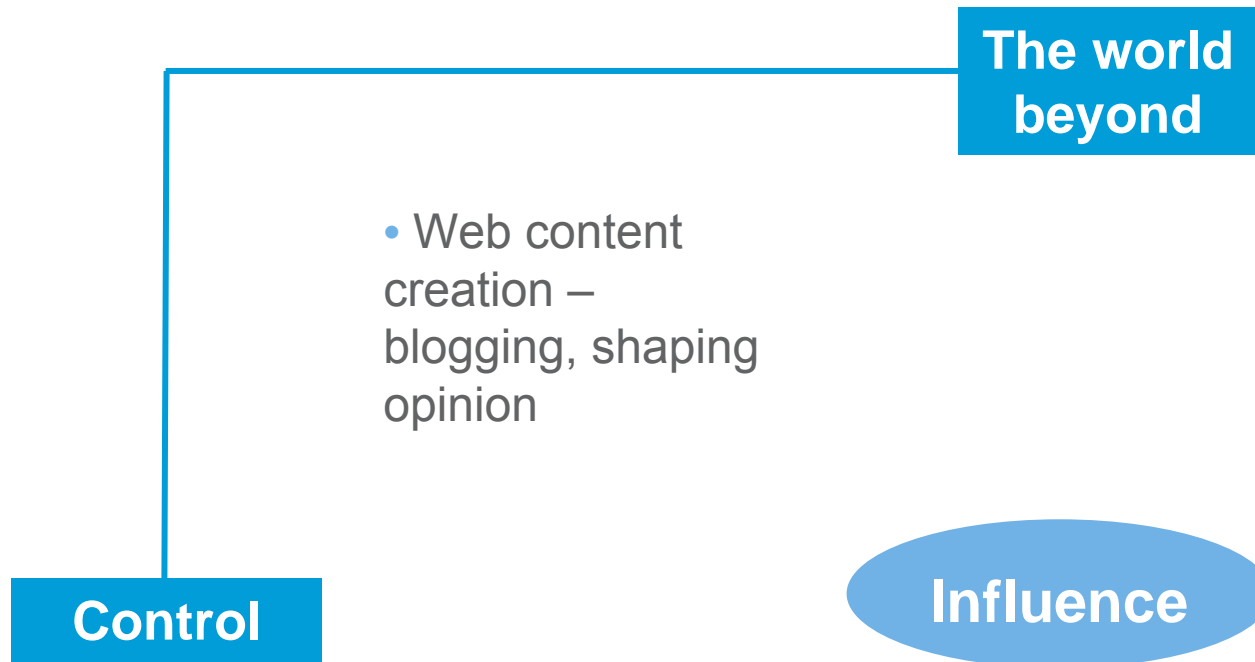
Interacting at home with the kids

“ My son (age 6) is getting real good with the computer. He can go to sites like Cartoon Network or Disney.com to play games. We've used the internet to look up information on reports he's had to do for school. We have a DVD player in the car for long trips. He has a Kidzoom digital camera and a Leapster.

... I'm also considering getting him a cell phone (though my husband doesn't agree) and will probably give him my old iPod shuffle with more kid-friendly music on it before we leave for our family vacation. ”



Using technology to influence, nurture advocacy



Leveraging networks to influence, nurture advocacy

“ I’m a member of Bzz Agent, Mom Central, Mom Select and She Speaks, so I get to try new products and help spread the word if the product is something I like. ”

“ I’m also part of an autism community through a Yahoo! group, which is incredibly helpful and knowledgeable regarding medical or even emotional issues ... There have been many times when my child has had a fever or some stomach issues that I’ve dealt with solely through the advice of this group. They are invaluable to me. ”

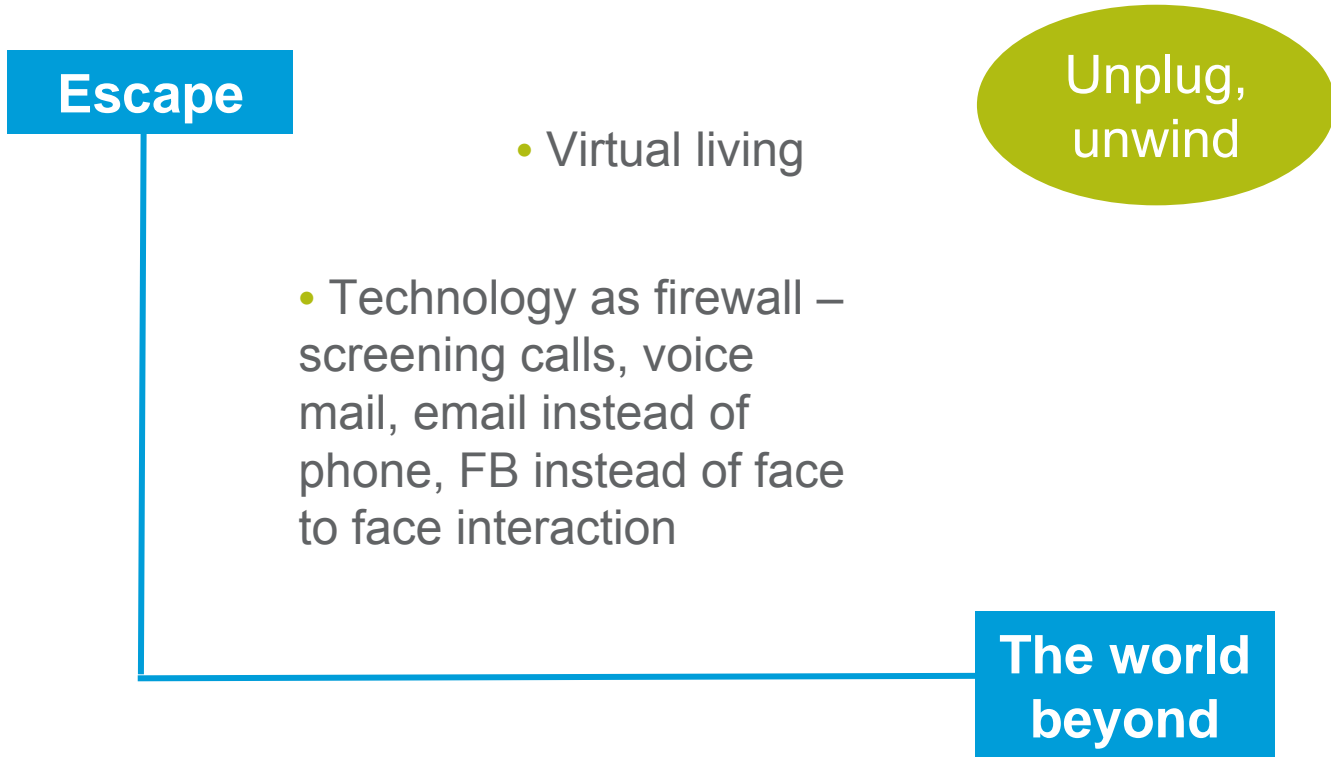


Help Melanie get to BlogHer 2009!
Please vote for me to win the Mabel's Labels sponsorship!

An illustration of a woman with brown hair, wearing a purple top and black skirt, sitting at a small round table. She is talking on a mobile phone. On the table are a red teacup and saucer. There are three shopping bags around her: a purple one, a blue one, and a teal one. A white gift bag with red flowers is also on the table.

Mel, A Dramatic Mommy

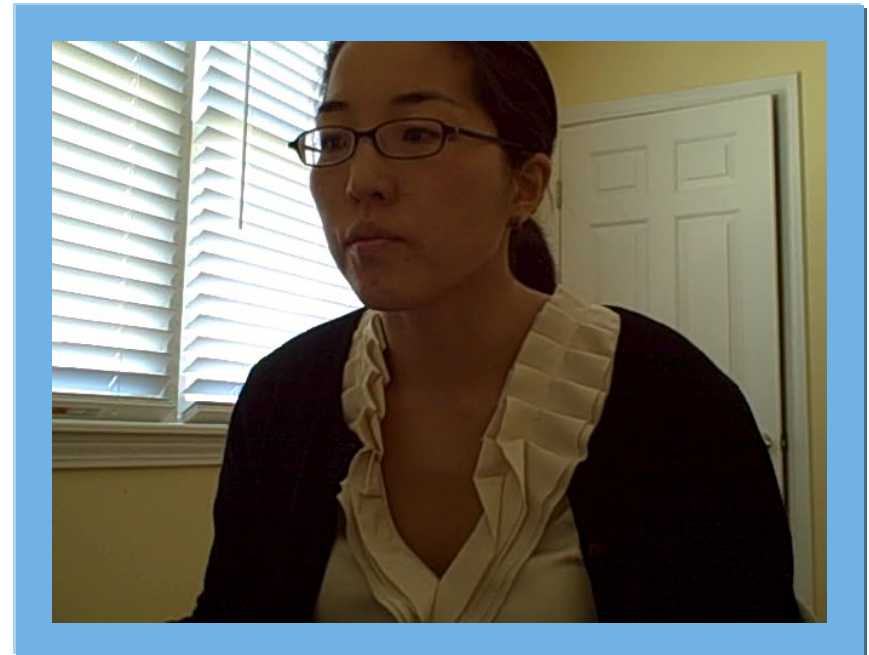
Refining role of technology in her world



Even Internet savvy moms express concern about privacy and dependency on technology

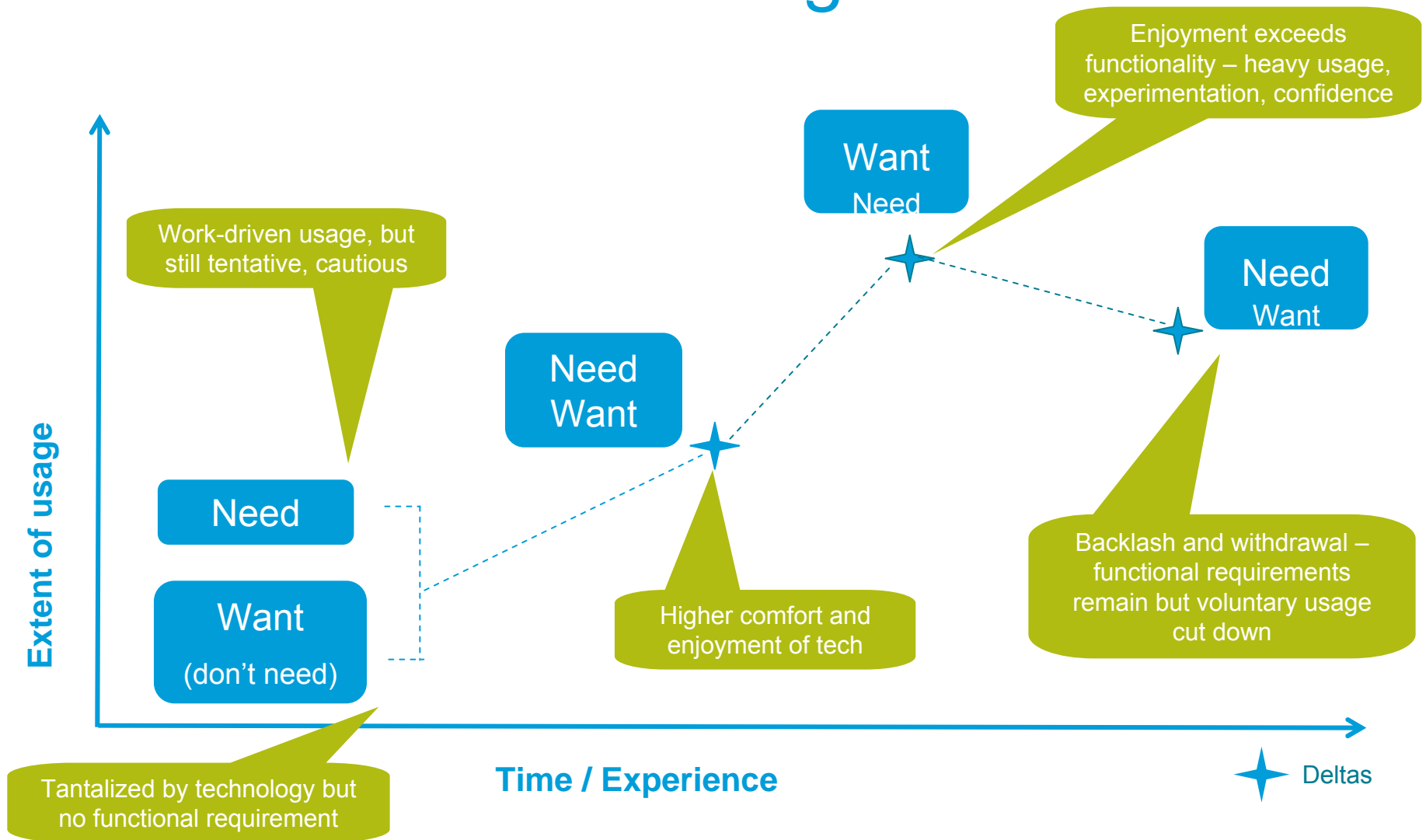
“ I’ve stayed away from social media sites like Facebook, LinkedIn, Twitter. I don’t write in any blogs ... In general, I am a private person. **I like having control** of knowing what information I tell whom, **rather than posting info about myself for a variety of viewers to peruse.** ”

“ I love FB. But I was spending entirely too much time on it ... because I had a 20-year class reunion ... **I found I was spending too much time in the past. I’m now limiting my FB time to 5 minutes a day and trying to stay in the present.** I do love that I can practically get a tickertape news feed on all my friends. ”

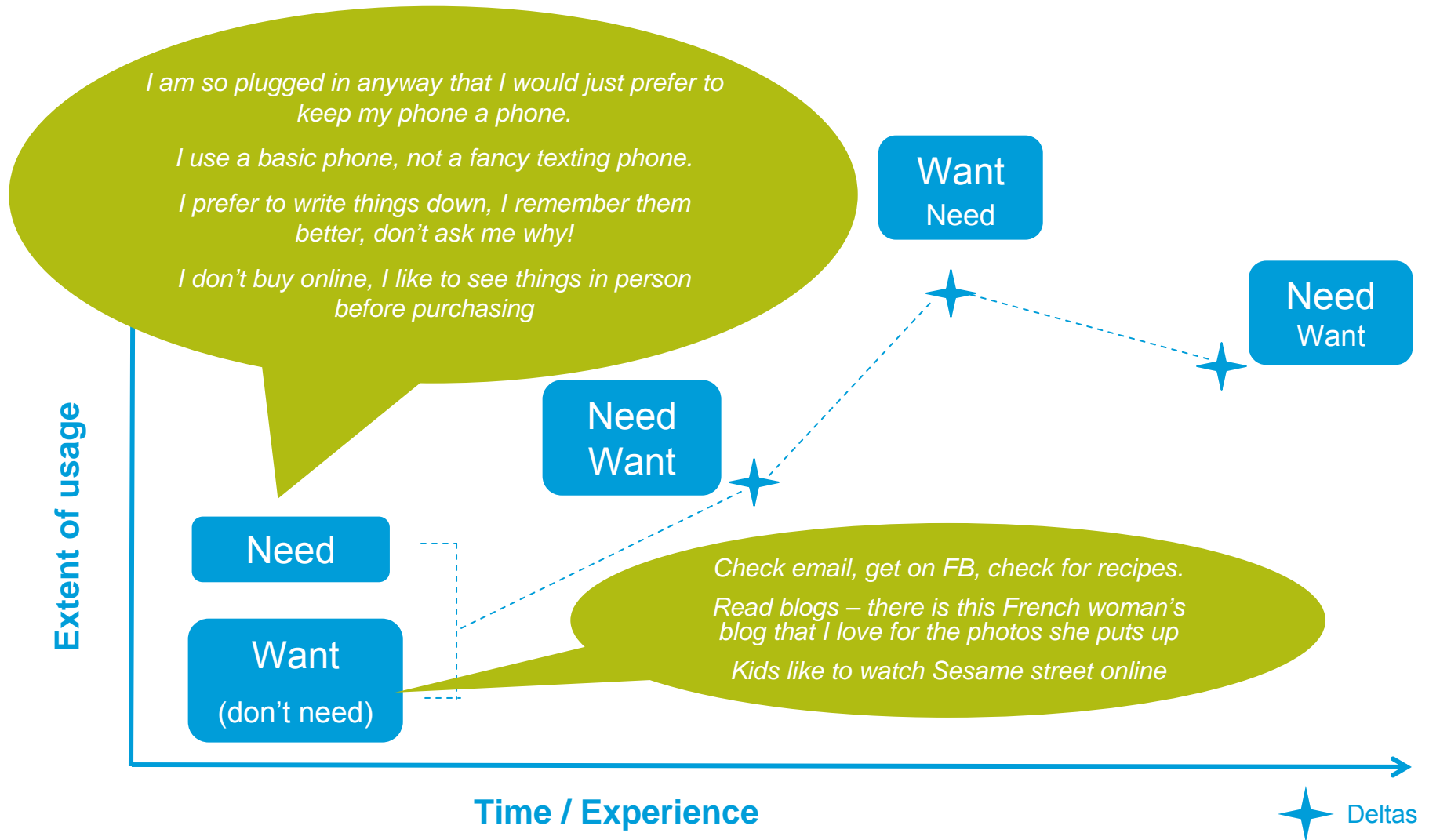


[Click here for video footage](#)

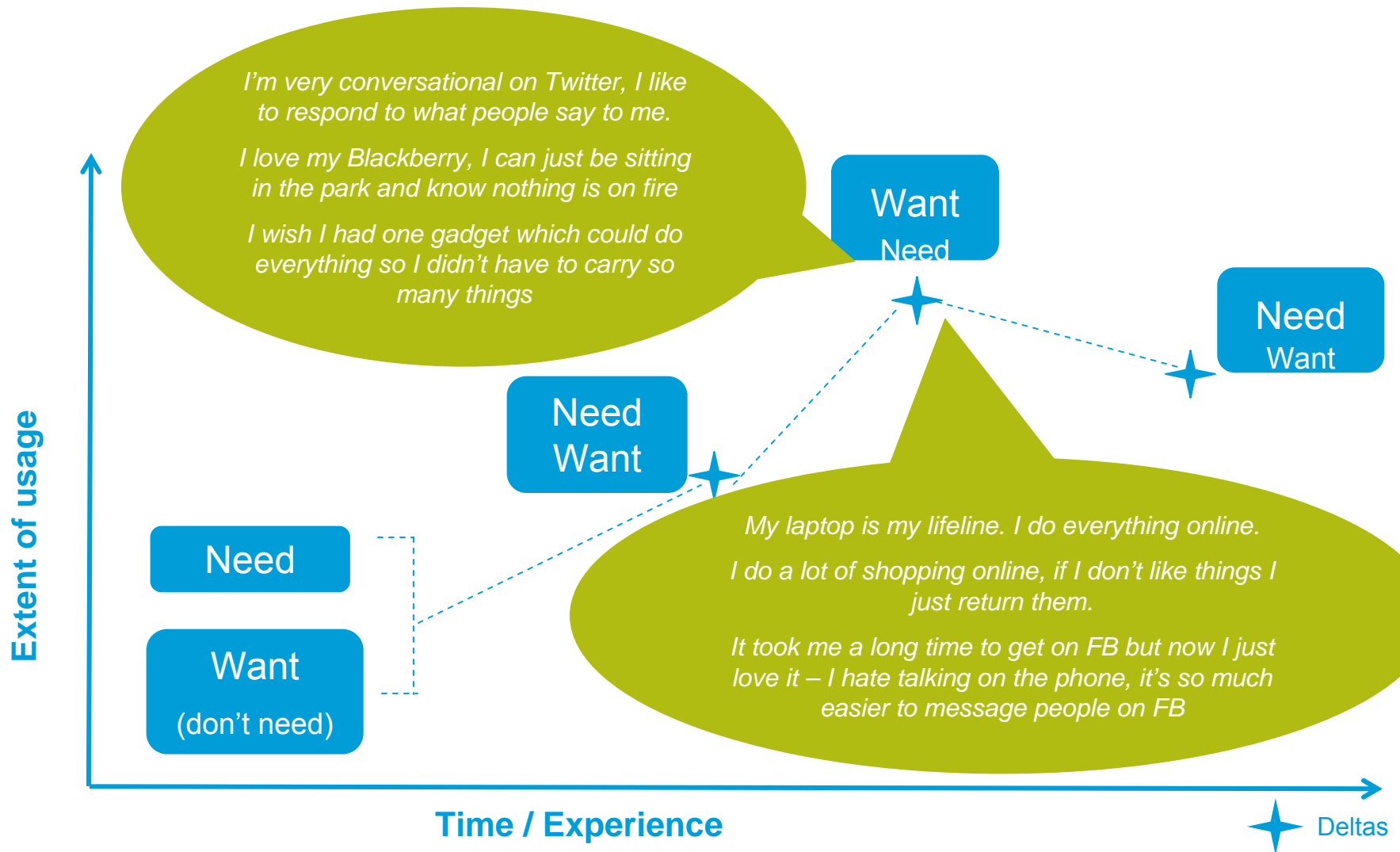
Tech evolution and usage



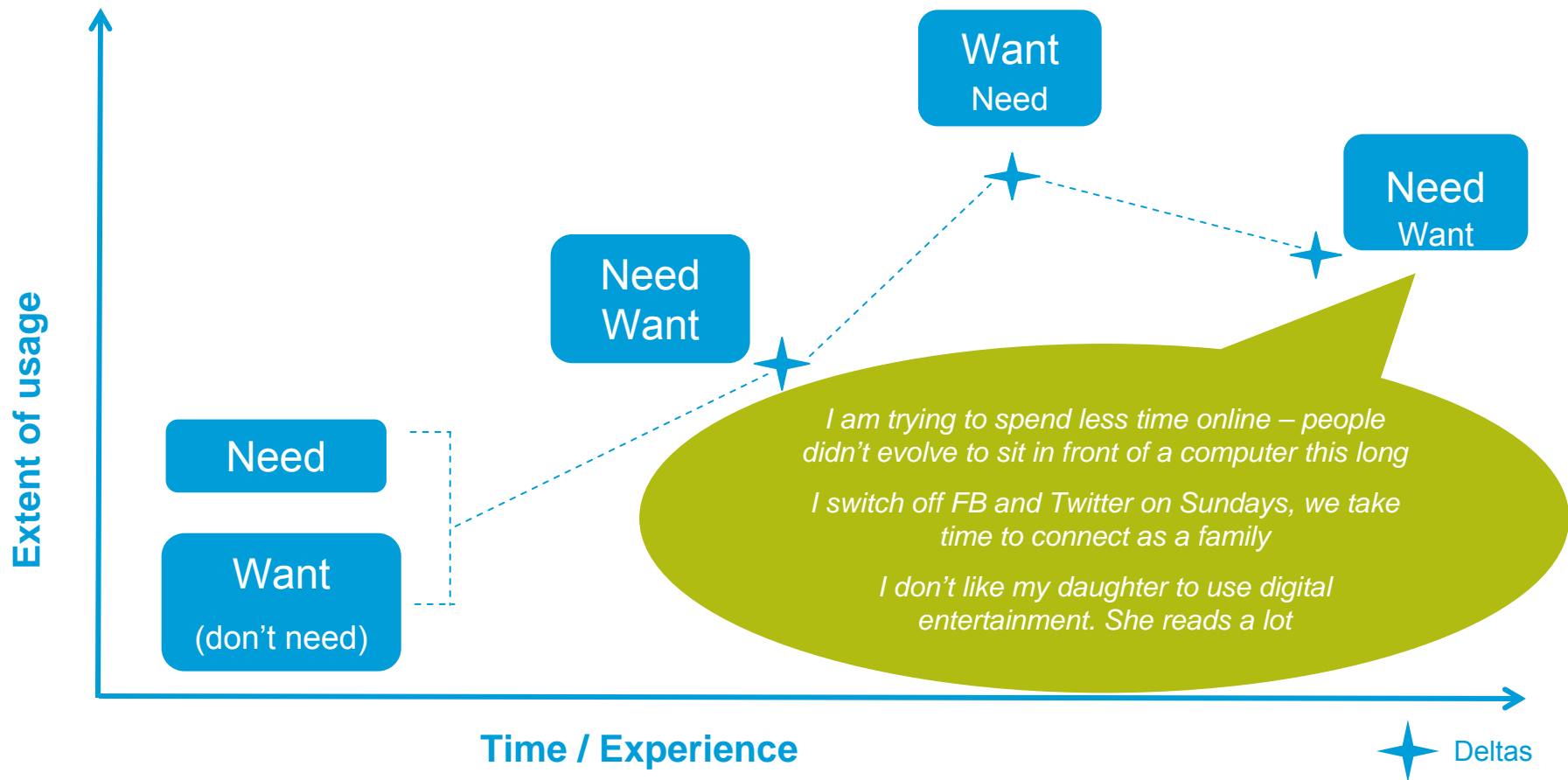
Tech evolution and usage



Tech evolution and usage



Tech evolution and usage



Key Takeaways

- No two moms are identical
- The Internet is a lifeline for Moms, but she is looking for ways to become more efficient online.
- Are you enhancing the experience where Moms gather? What can you do to add value, make it easier and simpler, enable her ?
- Take advantage of the convergence of habits and technology. E-Readers, Kindles, iPods, photos, scrapbooks — help Mom take offline habits online to create richer experiences at home
- Listen first, then act. Develop a “listening” mechanism to understand the voices, then carefully pick and choose your slots on when to engage these women ...
- Doing all the above should be as much a part of your customer service strategy as your marketing strategy.

Thank you.

About Nielsen Online

Nielsen Online, a service of The Nielsen Company, delivers comprehensive, independent measurement and analysis of online and mobile audiences, advertising, video, consumer-generated media, word of mouth, commerce and consumer behavior, and includes products previously marketed under the Nielsen//NetRatings, Nielsen BuzzMetrics and Nielsen Mobile brands. With high quality, technology-driven products and services, Nielsen Online enables clients to make informed business decisions regarding their digital, mobile and marketing strategies.

For more information, please visit www.nielsen-online.com.

Also, visit our blog at www.nielsen-online.com/blog.

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