# Mothers

ANALYZING THE DEMOGRAPHICS, DIGITAL BEHAVIORS AND ATTITUDES OF ONLINE MOTHERS

SUMMARY REPORT Q1 2017

www.globalwebindex.net

# Contents

# Introduction

GWI Audience reports are designed to examine the digital behaviors of a particular group – showcasing trends over time as well as analyzing how the audience in question compares to the overall internet population.

In this report, we focus on Mothers – defined here as females with one or more children under the age of 16 – and focus on the following topics:

**OVERVIEW OF MOTHERS** | From their demographics, professional lives and wealth levels to their attitudes and behavioral traits, what are the defining characteristics of this group?

**DEVICE OWNERSHIP AND USAGE** | How long are Mothers spending on mobiles each day, which other devices do they own, and which are their most important devices for online activities?

**ONLINE BEHAVIORS** | How many hours do they spend consuming media daily and what do they do when they second-screen?

**SOCIAL NETWORKING** | Which social networks do they use, and how do Mothers behave inside the social space?

**E-COMMERCE** | How many Mothers are buying online and what are the most popular products? What is most likely to motivate a Mother to buy?

**BRAND ENGAGEMENT** | How do Mothers research and discover brands and how do they interact with them? What reasons would encourage them to promote a brand online?

In this summary version, we highlight key insights and figures from our research.
To read the full version of this report, start a free trial with GlobalWebIndex **HERE**.

## DEFINING MOTHERS

Respondents in our Core survey are asked 'How many children do you have?' and if they identify as a parent, they are asked 'How old are your children?'. In this report, we focus on Mothers – defined here as females with children aged 16 or below.

**To re-create this audience access our Audience Builder on PRO Platform**

Name: Mothers

Gender
**Female**

AND

Age of Children
**Under 3**
OR **3 to 5**
OR **6 to 11**
OR **12 to 16**

**CLICK HERE**

# Notes on Methodology

Each year, GWI interviews over 350,000 internet users, asking a wide range of questions about their lives, lifestyles and digital behaviors.

To ensure that our research is reflective of internet users, we set appropriate **quotas on age, gender and education – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education**.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

Because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe and North America to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly. **Where a market has a high internet penetration rate, its online population** will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, **the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated.**

Please keep in mind that **all figures given in this report relate to the country's internet users, not to its total population.**

## INTERNET PENETRATION RATES

### ITU INTERNET PENETRATION METRIC 2015

| | | | |
|---|---|---|---|
| Japan | 93% | Russia | 73% |
| Netherlands | 93% | Malaysia | 71% |
| United Kingdom | 92% | Saudi Arabia | 70% |
| UAE | 91% | Argentina | 69% |
| Sweden | 91% | Portugal | 69% |
| South Korea | 90% | Poland | 68% |
| Canada | 88% | Italy | 66% |
| Germany | 88% | Brazil | 59% |
| Belgium | 85% | Mexico | 57% |
| Hong Kong | 85% | Turkey | 54% |
| France | 85% | Vietnam | 53% |
| Australia | 85% | South Africa | 52% |
| Singapore | 82% | China | 50% |
| Taiwan | 82% | Philippines | 41% |
| Ireland | 80% | Thailand | 39% |
| Spain | 79% | India | 26% |
| United States | 75% | Indonesia | 22% |

## SAMPLE SIZE BY MARKET

### SAMPLE SIZE

Number of respondents in each market that are Mothers

| | | | |
|---|---|---|---|
| Argentina | 160 | Philippines | 205 |
| Australia | 131 | Poland | 134 |
| Belgium | 89 | Portugal | 118 |
| Brazil | 215 | Russia | 236 |
| Canada | 226 | Saudi Arabia | 83 |
| China | 962 | Singapore | 109 |
| France | 380 | South Africa | 171 |
| Germany | 262 | South Korea | 104 |
| Hong Kong | 100 | Spain | 421 |
| India | 135 | Sweden | 91 |
| Indonesia | 193 | Taiwan | 98 |
| Ireland | 238 | Thailand | 145 |
| Italy | 335 | Turkey | 161 |
| Japan | 73 | UAE | 139 |
| Malaysia | 153 | UK | 1217 |
| Mexico | 169 | USA | 1304 |
| Netherlands | 95 | Vietnam | 137 |

This report draws insights from GlobalWebIndex's Q3 2016 wave of research across 34 countries, which had a global sample size of 51,125. Among this sample, there were 8,789 Mothers.

## DEVICE

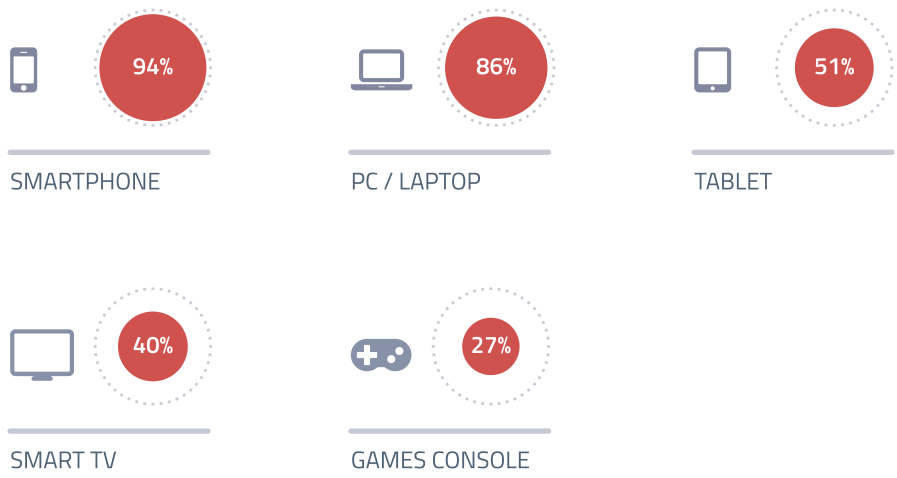
Which devices are Mothers most likely to own, and which are they using to get online? How long are they spending online on each device?

# Key Headlines

- Smartphone ownership has now surpassed PC/laptop ownership – 94% have one. But PCs/laptops aren't being abandoned – instead, **online Mothers are opting for a multi-device approach.**
- **Smartphones are also the most important internet device among this group** (on 47%), with laptops (28%) and tablets (4%) some way behind. Online Mothers in fast-growth markets are most likely to cite smartphones as their most important device.
- **Online Mothers are spending almost an hour more per day online than they were in 2012 (6¼ hours per day in total), with mobiles being the principal driver behind this**. But PCs/tablets/laptops certainly aren't being cast aside, having only experienced a small decline in the same period.

**DEVICE OWNERSHIP**

% of Mothers who own the following devices




**Question:** Which of the following devices do you personally own?
**Source:** GlobalWebIndex Q3 2016 | **Base:** 8,789 Online Mothers aged 16-64

**PRO Platform:**
Device Ownership and Access > Device Ownership

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# SOCIAL MEDIA

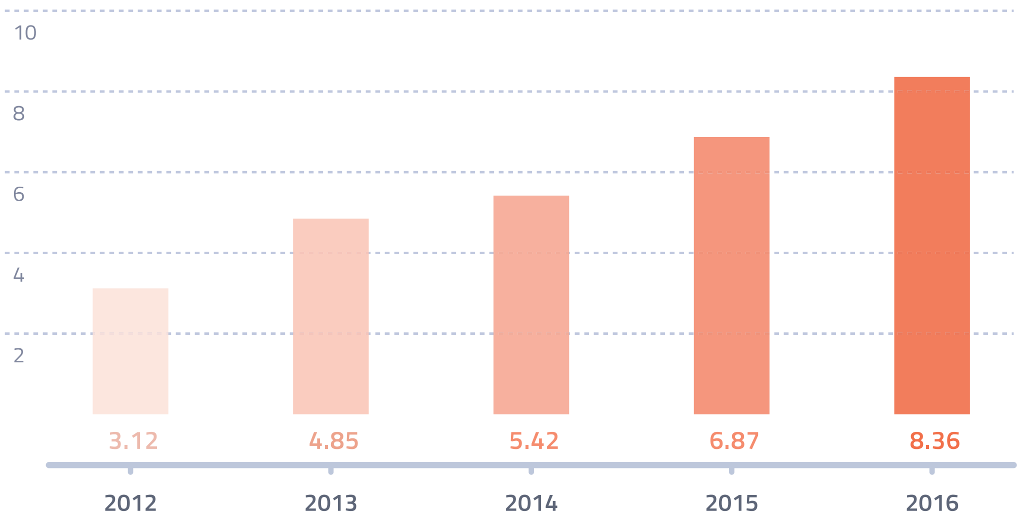
How are online Mothers engaging with social media and on which device, which platforms are they using, and how long are they spending social networking per day?

## Key Headlines

- **Social media commands the lion's share of online time per day among Mothers** (on around 2¼ hours), helped by the striking rise of mobile among this group.
- **Virtually all online Mothers are social networking each month**, the extent to which mobiles now underpin social activities among this group is shown in these devices posting the highest figures for virtually all of the networking actions in our list.
- Facebook is the most popular service among online Mothers outside China (where WeChat dominates), but our data shows that **Mothers are prolific multi-networkers, averaging around 8.36 social media accounts.**
- **Mothers do in fact display a more "active" form of social networking engagement compared to the average internet user** – among their strongest over-indexes for using social media are to share details of their daily lives, and to share photos or videos with others, and they are much more likely to be uploading videos to Facebook and tweeting about a TV show on Twitter.

**MULTI-NETWORKING AMONG MOTHERS**

Average number of social media accounts among Mothers




**Question** On which of the following services do you have an account?
**Source:** GlobalWebIndex 2012-2016 (averages of all waves conducted in each year) |
**Base:** Online Mothers aged 16-64

**PRO Platform:**
Social Media > Members

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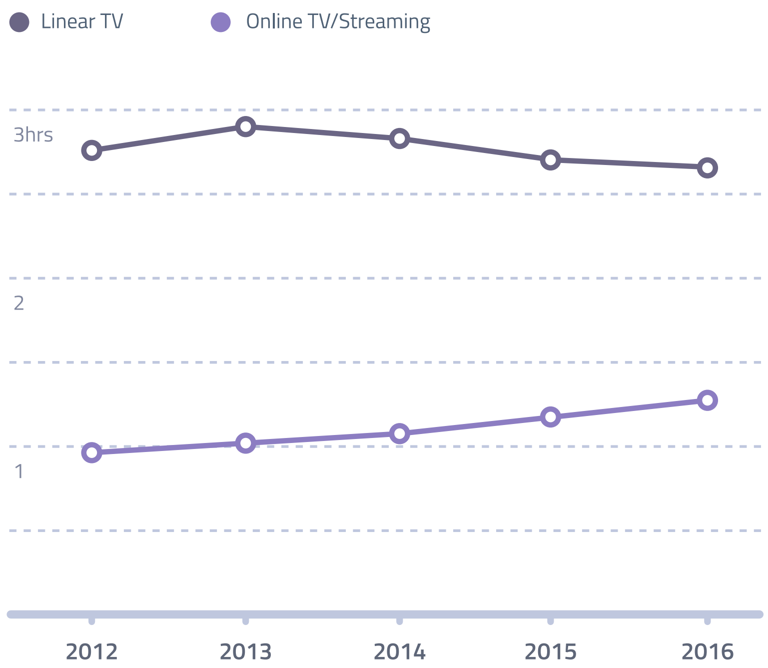
# MEDIA CONSUMPTION

Which online entertainment services are Mothers using, and how likely are they to be paying for them? How long are online Mothers spending watching online TV vs. linear TV per day, and what are they doing while watching TV?

## Key Headlines

- Globally, **84% of Mothers are now second-screening**. Mobiles are central to this activity, with 2 in 3 dual-screening via mobile compared to less than 4 in 10 via laptop. This group are most likely to be checking social networks or chatting to friends (both on 4 in 10) whilst dual-screening.
- **Linear TV still retains a central role in the daily media portfolio of online Mothers** – this audience are now devoting over 2½ hours per day to this form of entertainment. Online TV/streaming has experienced consistent year-on-year growth, now approaching the important one hour per day landmark.
- Each month, 2 in 3 online Mothers are using a music-streaming service, with 62% streaming live television**. Mobiles stand out as the most popular option for audio entertainment media**, whereas PCs/laptops are the go-to device for live television and sports entertainment.
- There exists a significant discrepancy between those online Mothers using online services and those willing to pay for them. But our data shows that online **Mothers are in fact slightly more likely than average to be paying for digital content each month overall**, with some of their most notable over-indexes being movie/TV streaming services and downloads.

### YEAR-ON-YEAR DAILY TIME SPENT ON...




**Question:** Roughly how many hours are you actively engaged/connected with the below content/media during a typical day? **Source:** GlobalWebIndex 2012-2016 (averages of all waves conducted in each year) | **Base:** Online Mothers aged 16-64

**PRO Platform:**
Media Consumption
> Time Spent Watching Linear TV

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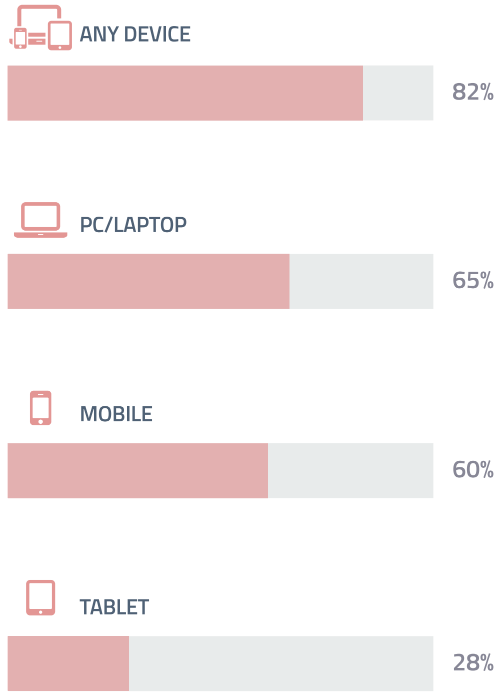
# E-COMMERCE, BRAND DISCOVERY & RESEARCH

How many Mothers are buying online and on which devices? How are this group most likely to discover a new brand, how are they researching products online, and what would motivate an online Mother to complete a purchase?

## Key Headlines

- Purchasing online is a staple online activity among online Mothers - 82% bought a product online last month. **PC/laptops are the most important device for this activity (on 65%), but it's now 60% of Mothers using smartphones to purchase online too.**
- 8 in 10 online Mothers say they are the main food shopper in their household, with clothes and FMCG products being the most popular purchases among this group.
- **Free delivery is the most important factor in motivating Mothers to complete a purchase**, but 4 in 10 say that customer reviews would increase their likelihood of buying something too.
- The continued influence of the more "traditional" marketing channels among this group is clear to see - **43% say they find brands through ads seen on television or through search engines**. That said, search engines may be the most popular product research route, but social networks are now the second most important channel for this activity among this audience.
- **32% are now blocking ads on their main computer, and 3 in 10 doing the same on their mobiles**. APAC leads for mobile ad-blocking, whereas desktop ad-blocking is much more even between regions.




**Question:** In the past month, which of the following things have you done on the internet on a PC/Laptop?
**Source:** GlobalWebIndex Q3 2016 | **Base:** 8,789 Online Mothers aged 16-64

**PRO Platform:**
Online Activities and Behaviors > Activities via Any Device

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# BRAND RELATIONSHIPS & ADVOCACY

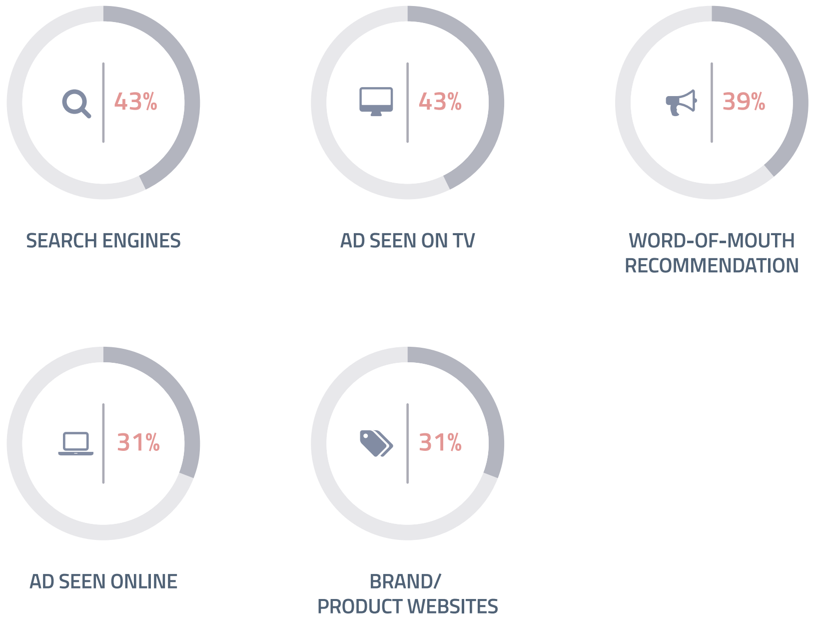
On which channels do this group tend to interact with their favorite brands, and what factors would motivate them to endorse these brands or products?

## Key Headlines

- Brand's websites are the most important brand interaction point among this group, but they do **display a strong inclination to lean towards social media when interacting with a brand,** over-indexing the most highly for engaging with a brand's post on a social network and using a "social share" button on a website.
- **There are more Mothers posting online reviews than there are those using them to inform their purchasing decisions** (50% vs. 40%, respectively).
- **High-quality products are most likely to convert an online Mother into a brand advocate**, but financial rewards also score highly, indicating that many Mothers will engage in advocacy when they see a clear value exchange.
- **Positive brand-consumer relationships also underpin brand advocacy among this group**, with having insider knowledge about a brand's products and having a personal relationship with a brand being among their top over-indexes.

### TOP 5 BRAND DISCOVERY CHANNELS

% who say that they find brands via the following channels




**Question:** In which of the following ways are you most likely to find out about new brands, products, or services?
**Source:** GlobalWebIndex Q3 2016 | **Base:** : 8,789 Online Mothers aged 16-64

**PRO Platform:** Marketing Touchpoints > Brand Discovery

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Each chart is accompanied by a hyperlink which will take you to the appropriate section on PRO Platform; simply click on the relevant link to start exploring the data further.

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Price Point
Platform Testing
Concept Testing

### CAMPAIGN & AUDIENCE SOLUTIONS
Segmentation
Campaign Measurement
Audience Profiling
Audience Targeting

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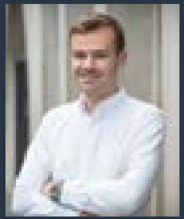


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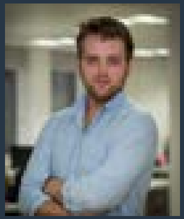


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