

Digital Mum Survey Indonesia 2022

June 2022

theAsianparent

#1 parenting app in Southeast Asia



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What is DMS?

Digital Mom Survey (DMS) is one of “theAsianParent” syndicated reports that will be held annually starting from 2021.

The report consists of key information covering moms’ behavior towards digital media as part of moms’ primary source of information and understanding of their daily activities.

Following aspects were tracked to see how much digital media has impacted moms daily lifestyle

Asking the right information



Digital media usage behavior

What time do they usually spend on digital media?

How do moms usually spend their time in digital media?

What are the trends of gadget usage this year?



Area of interest with digital media

What are moms activities while using social media?

Which of social media content moms like the most?

What Apps do moms prefer while using social media?

Which contents are currently popular for moms this year?



Online shopping behavior

How do moms usually shop online? What are the steps?

Do moms usually planned their online purchase?

Which of online shopping Apps do moms usually use?

What products do moms usually purchase online?



Recent popular Apps behavior

How moms behave in recent online TV streaming?

How moms behave in recent e-consultation Apps?

How moms behave in recent transport/delivery apps?

How do we collect our data



Questionnaire
Development



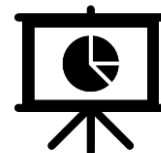
Deciding target
respondent



Launching
survey to our
community
platforms

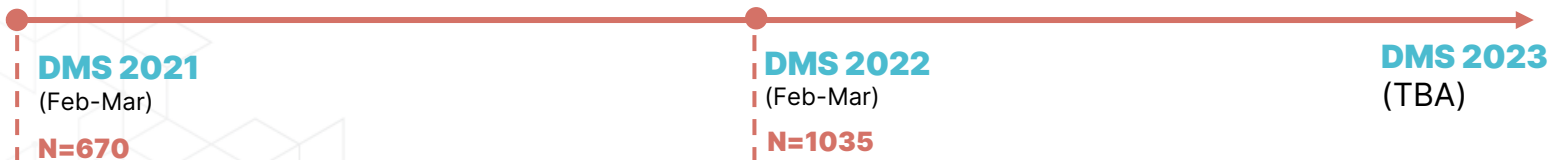


Validity check
before launching
reports



Report publication
to general
audiences

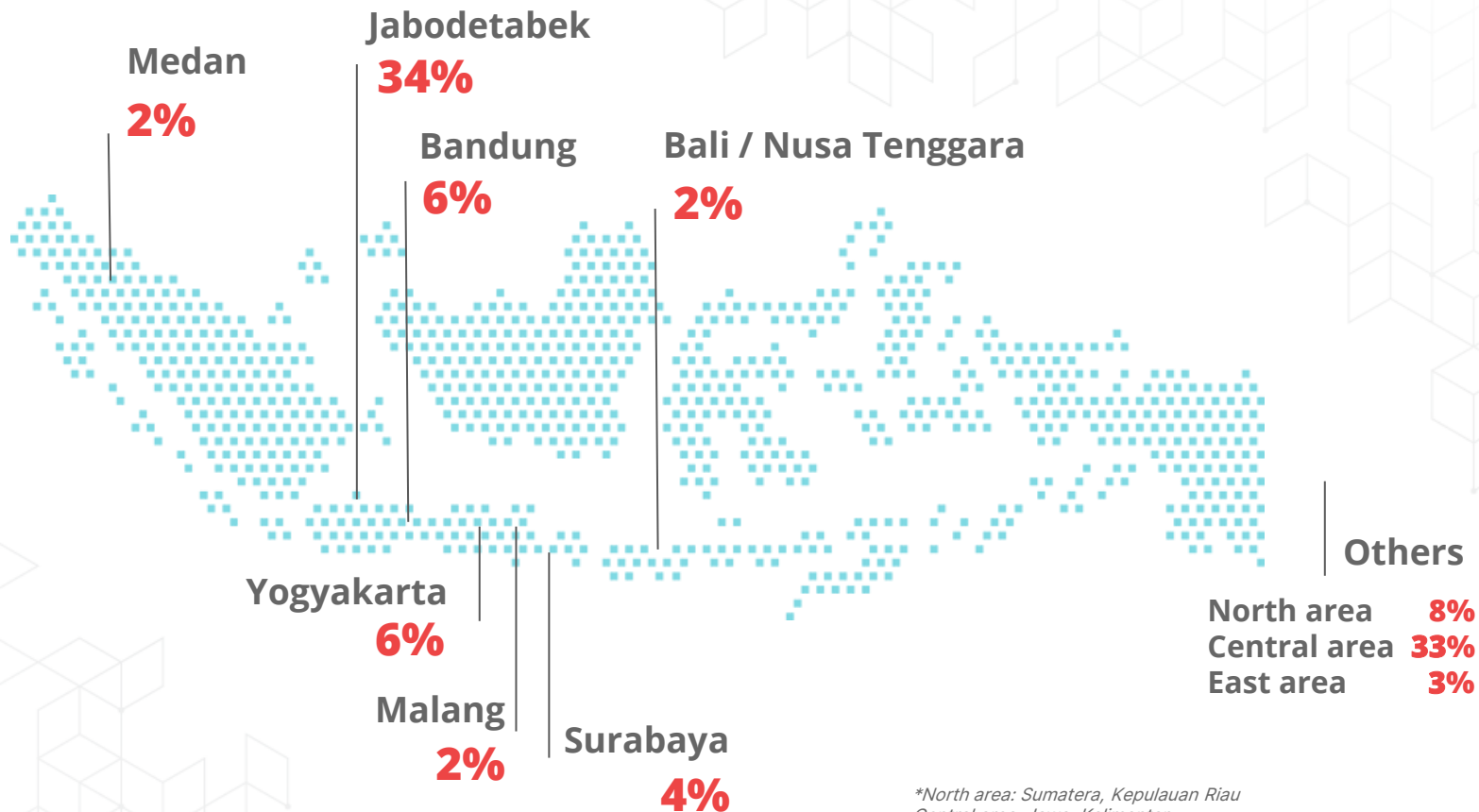
The timelines



Demographics

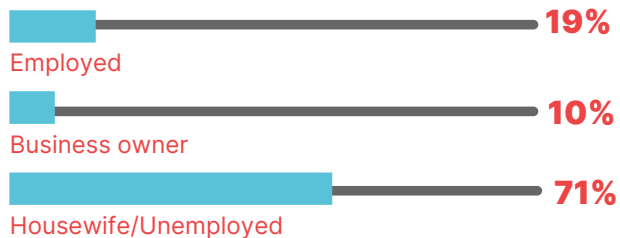


Where do they reside?

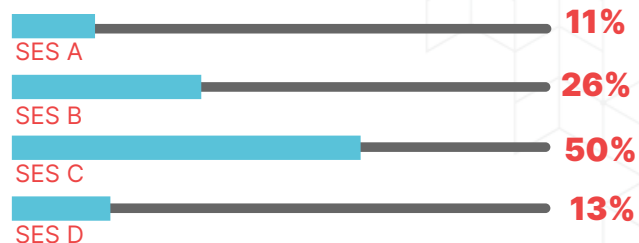


Majority of the respondents were first time moms, pure housewife and belonging to SEC middle

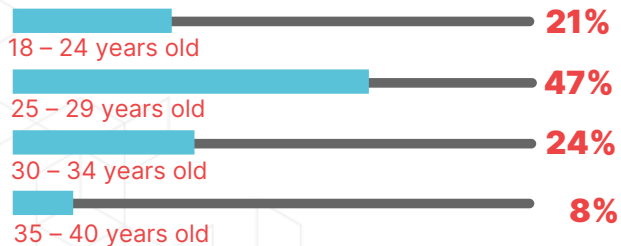
Occupation



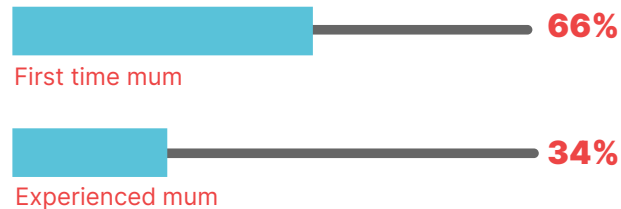
Monthly Expenditure



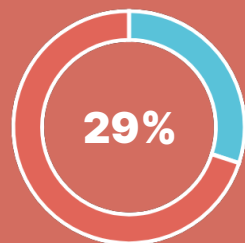
Age groups



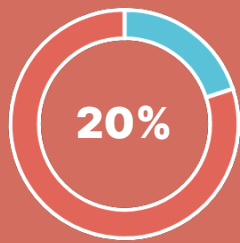
Parenting Status



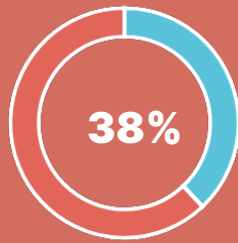
Age of the youngest child (amongst those who have children)



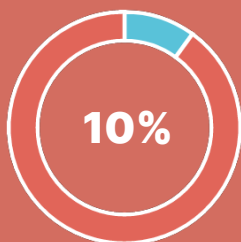
0-6
months old



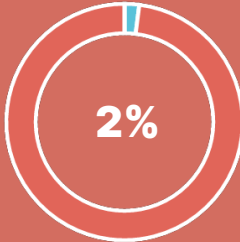
7-11
months old



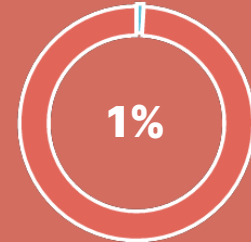
1-2
years old



3-4
years old



5-6
years old



>7
years old

02

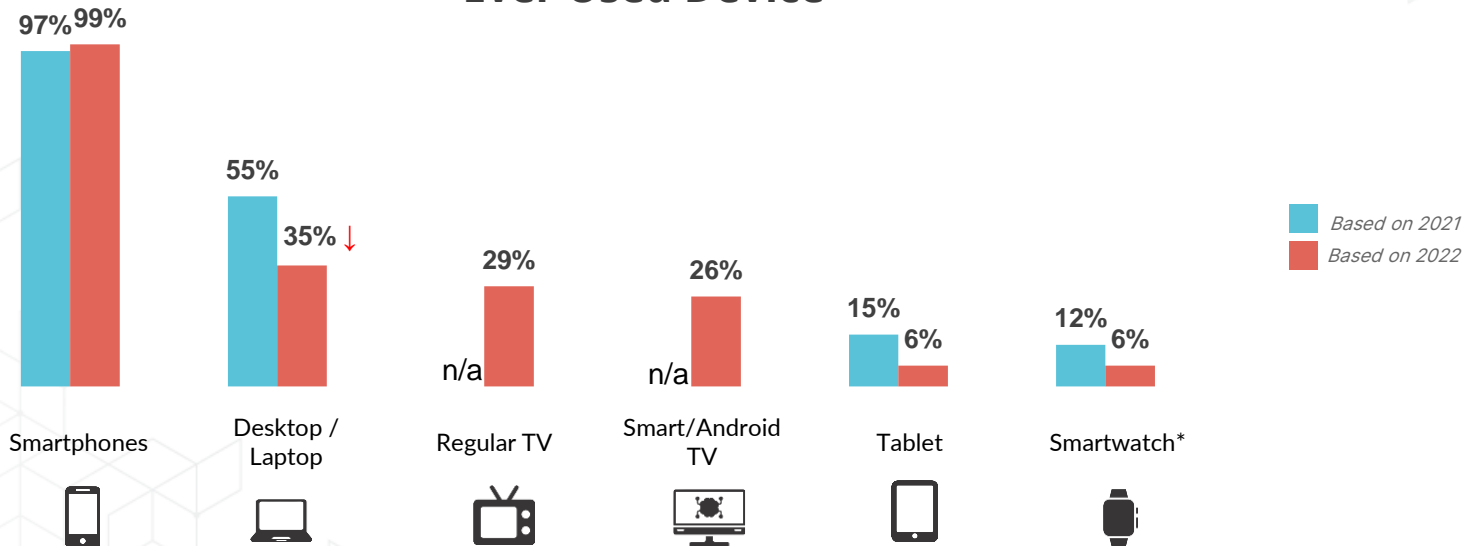
General app usage



What are moms device usage?

Significant decrease in desktop/laptop usage observed this year by the moms, most likely driven by the factors of recent study-at-home policy from their children.

Ever Used Device



*Small base

NOTE: Regular TV (TV without built-in Android / company-owned apps); Smart TV (TV with built-in Android/company own apps)

↑ ↓ Significantly higher / lower compared to previous year with 95% confidence level

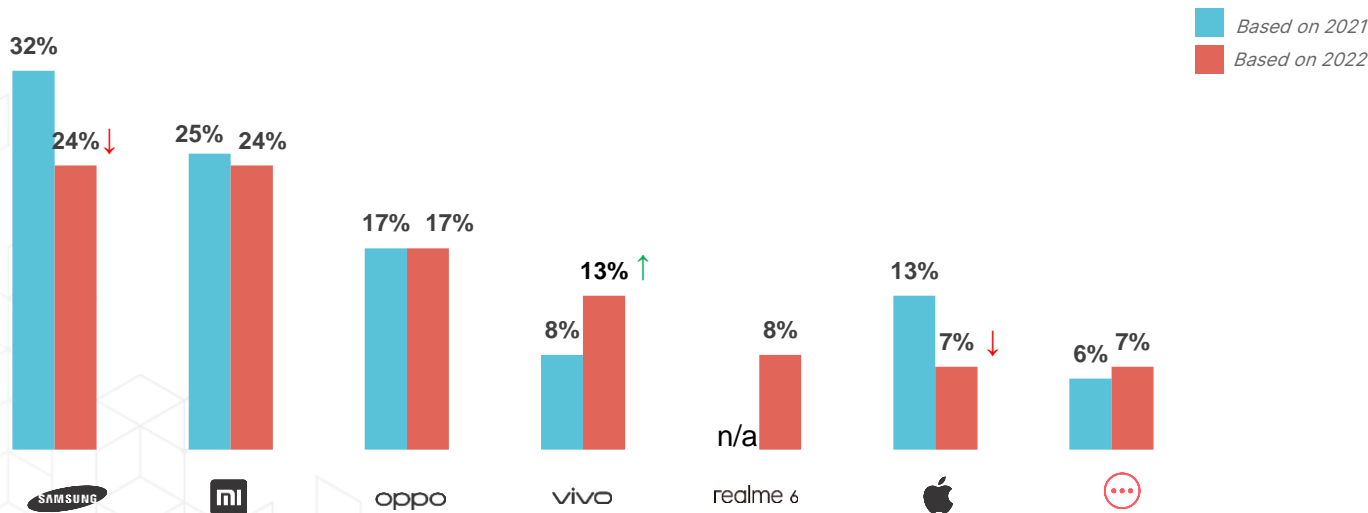
N=670 (all respondent 2021), N=1035 (all respondent 2022)

Q: Can you please tell me which of these devices you own for yourself?

Which smartphone brands do moms use most often?

Vivo is seen to have a gradual increase on its users this year, while the majority are still opted for Samsung and Xiaomi. However, iPhone has been gradually declined.

Smartphone Currently Used



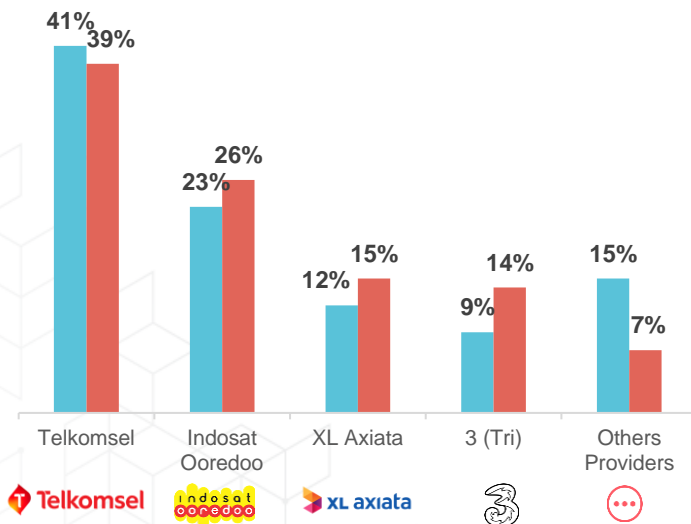
N=670 (all respondent 2021), N=1035 (all respondent 2022)

Q: What is the brand of your smartphone that you are currently using?

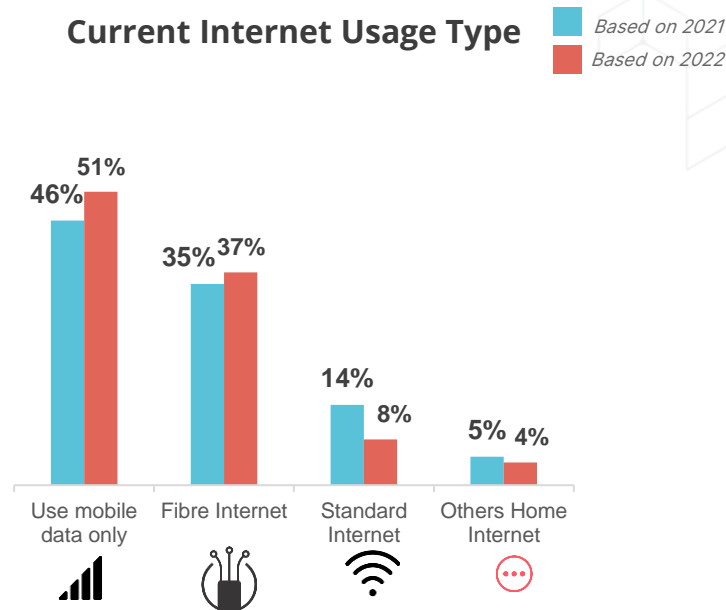
Which service providers do moms often use?

The recent news of Indosat acquisition with Tri successfully may have contributed to the increase of its users in 2022. Also, mobile data is much preferred than internet-at-home

Current Internet Provider



Current Internet Usage Type



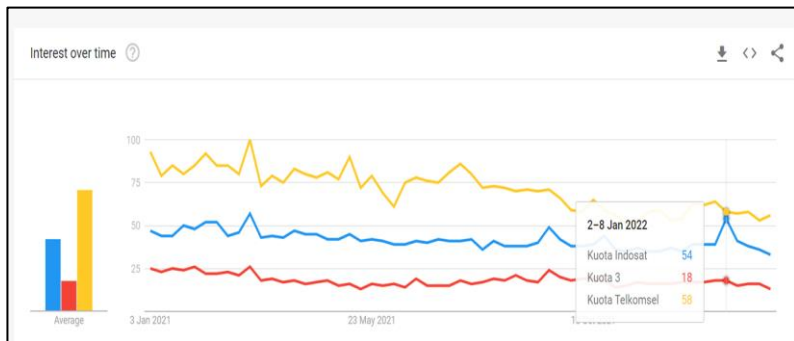
n=670 (all respondent 2021), n=1035 (all respondent 2022)

Q: Which service provider are you using for your primary/main phone? / Q: What home internet are you currently using mostly?

↑ ↓ Significantly higher / lower compared to previous year with 95% confidence level

Price sensitivity might be one of many factors

Based on trends



*Based on Google Trends, 2022

From Jan 2021 – Jan 2022, Indosat reached the highest trend point on January 2-8 2022. During that period, Indosat and Tri had a merger on Jan 4, 2022.

Based on the package service value

Provider	Detail Paket	Masa Aktif	Harga
Telkomsel	Kuota Internet 1,5GB *Kuota Internet (lokal) 8,5GB Kuota Sosmed 8GB WhatsApp, Line, Zoom, TikTok, Facebook, Instagram, MusicMAX, GamesMax *besaran kuota tergantung wilayah	30 hari	Rp 60.000
Indosat	Kuota Utama 18GB Nelpon ke IM3 dan Tri sepuasnya	30 hari	Rp 60.000
Tri (3)	Kuota utama 24 jam (2G/3G/4G) 2GB Kuota 4G 24 jam 8GB	30 hari	Rp 50.000

*Based on Telkomsel, Indosat, and Tri official website

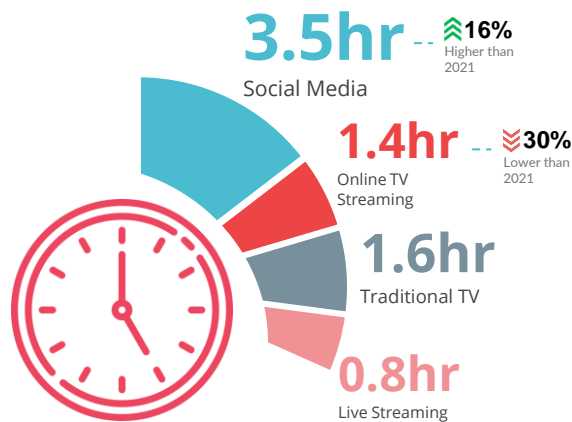
With a similar price, Indosat is offering the largest internet quota, but this must also taken into consideration the internet speed that every provider provided and benefits that each user with different needs.

Average time spent on daily activities

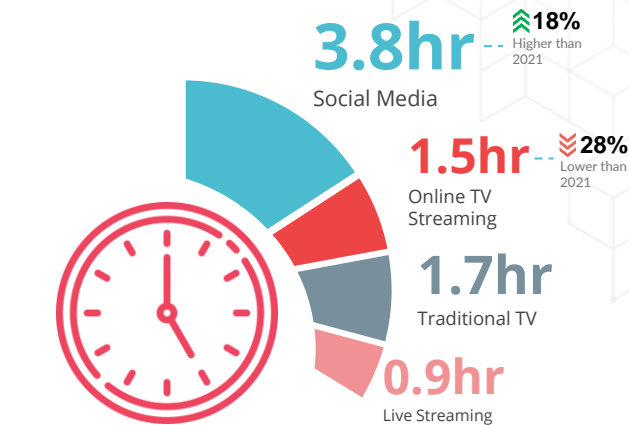
Social media usage have increased this year with an average of 3 hours for both weekdays and weekend, while online TV streaming spending is seen to be much lower.

“On average, moms spend about 6 hours a day on media usage”

Meanwhile, online TV presence is seen as high as traditional TV



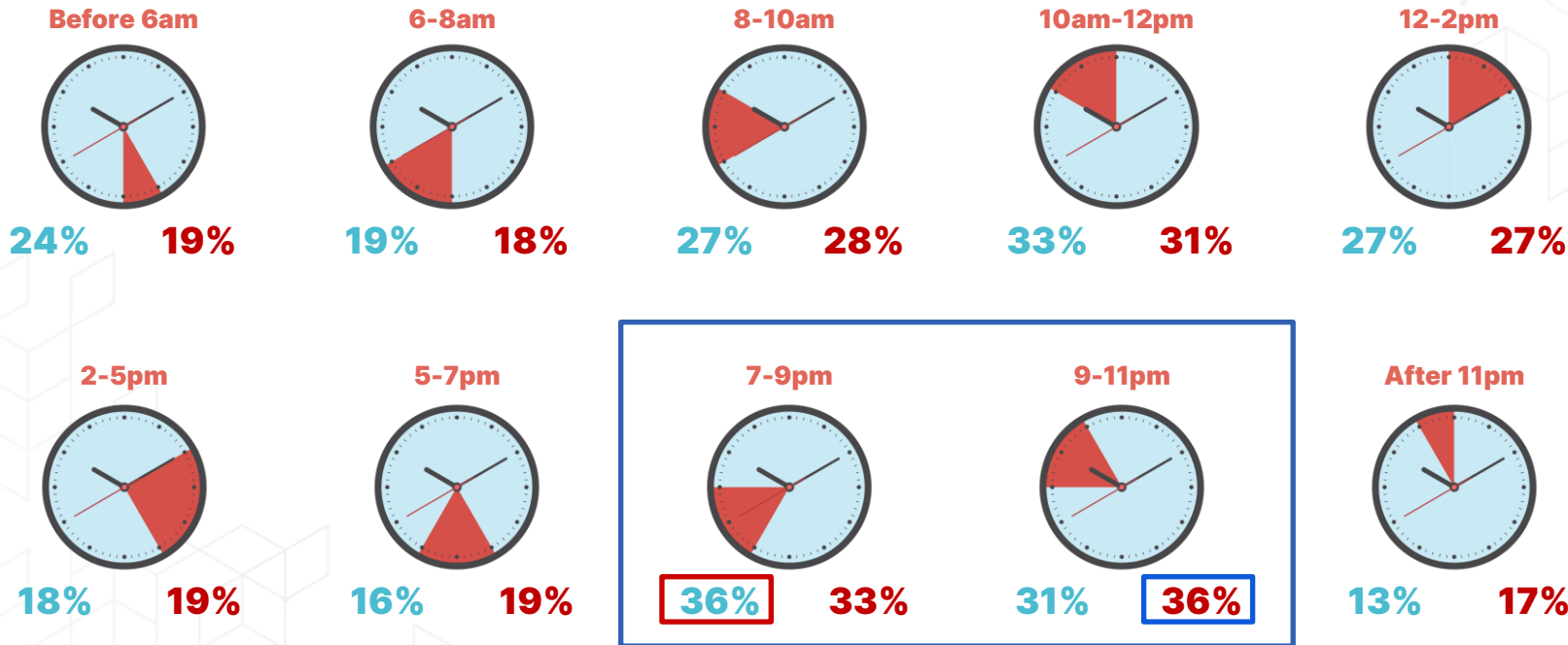
Weekdays



Weekends

What time do moms surf and browse internet?

While moms were active at different times throughout the day, 7-9 PM would be the best time to engage during the weekdays and later at night at 9-11 PM during the weekend.



Weekdays
Weekends

Key takeaways

Moms are spending more on social media this year

Moms' social media spending is seen to **increase by around 10%** this year with social media browsing for **3.5hours** a day.

Key implication:

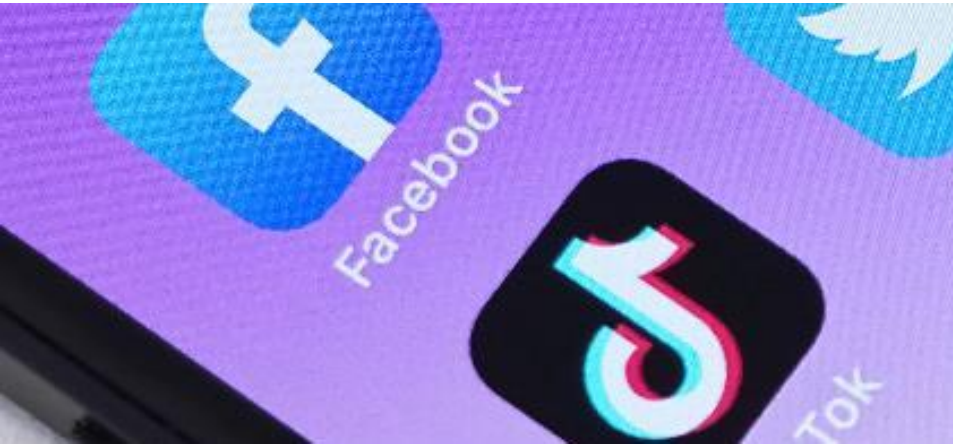
- Advertisers need to pay attention to moms' shifting behavior in social media spending with the increment observed this year.
- Increasing investment in social media would be an opportunity to boost awareness and engagement.

When to communicate with moms?

Night time starting at **7-11 PM** would be the best time for advertisers to connect with moms online.

Key implication:

- Placing relevant and engaging content to catch moms' attention during night time as they have just finished their chores and having relaxing personal time.





3 Social media apps



In 2022, moms are still enjoying as content creator

The amount of moms that enjoying as creator content is similar (with 83%) against last year. Increment has been observed with moms taking their time to browse on social media before making any online purchase.



2%

Lower than 2021

83%

Moms actively **creating** something on their social media apps



5%

Higher than 2021

85%

Moms casually **browse something** on their social media apps



3%

Higher than 2021

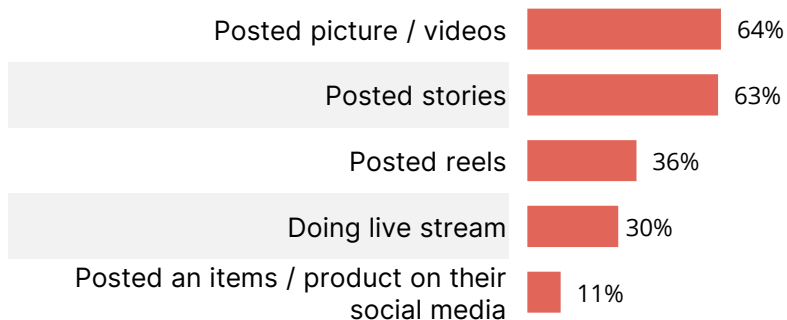
66%

Moms are using social media as **secondary source** of online purchase

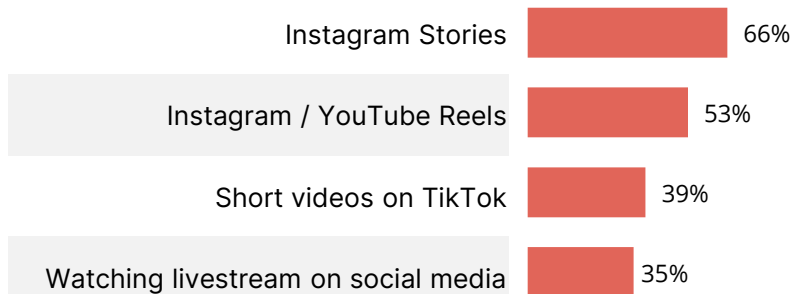
Stories and reels as the most preferred content by moms

Majority of moms loves to see and engage with Instagram stories and reels this year. They have also posted stories frequently in their Instagram feed together with pictures/videos

Types of posts mom **upload** on social media



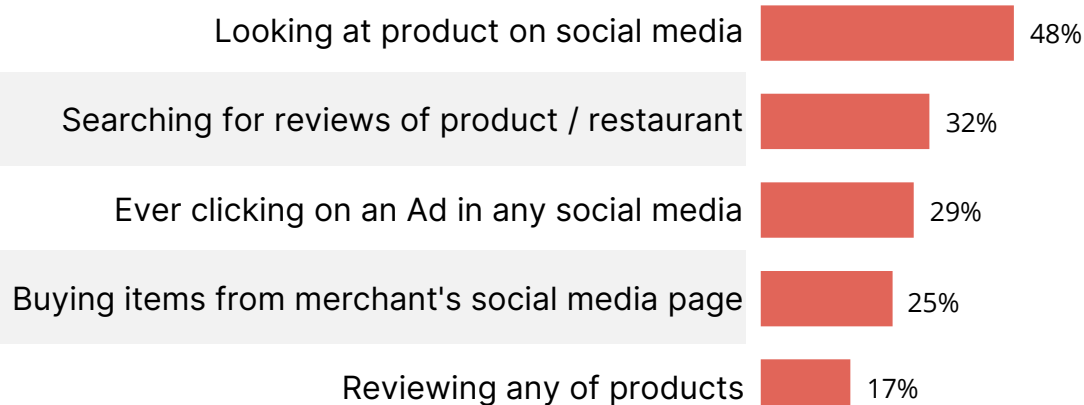
Types of posts mom **viewed** on social media



Also, not neglecting the product placement in social media

At least 48% of moms have seen the product in social media and 32% of them seeking for any product reviews through social media as well

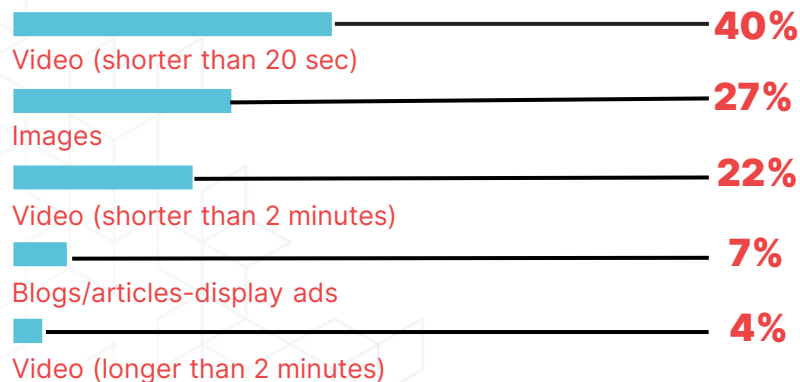
Type of activities in social media



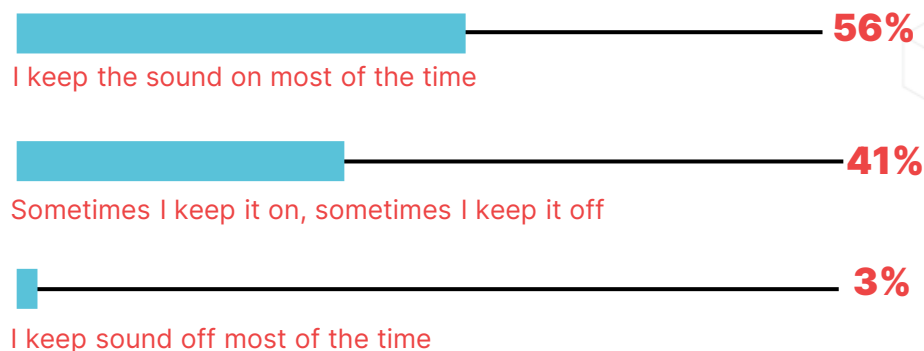
Short video content are the best option to scale up viewers

As moms would love to keep their sound on when watching videos; hence, it is important to have good voice over or music in social media ad placements to draw moms attention.

Most liked advertisement



Preference of switching the sound when watching videos on social media



n=1032 (social media users 2022)
Q: Out of the different formats, which format of the advertisements do you like the most?
Q: When you watch videos on social media, do you switch on the sound?

More moms are seeking holiday-related content in 2022

Advertisers should pay attention in behavioral changes during pandemic as more moms are now seeking holiday-related content with Traveloka as their preferred travel app



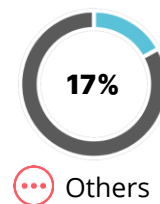
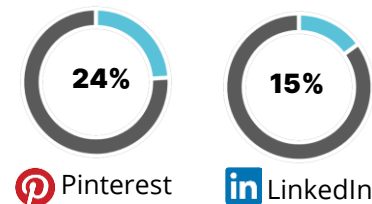
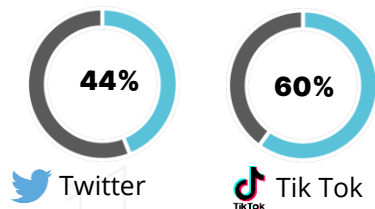
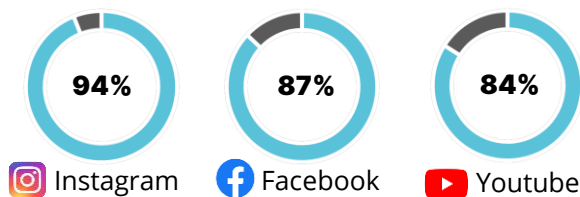
Poll: Which travel apps do you prefer most?

**80%****18%***n=185 (Quickpoll Survey Results)*

Pinterest and LinkedIn have also been downloaded by moms

Aside from popular social media apps, it is also interesting that some of the moms are looking up LinkedIn and Pinterest as part of their consideration set

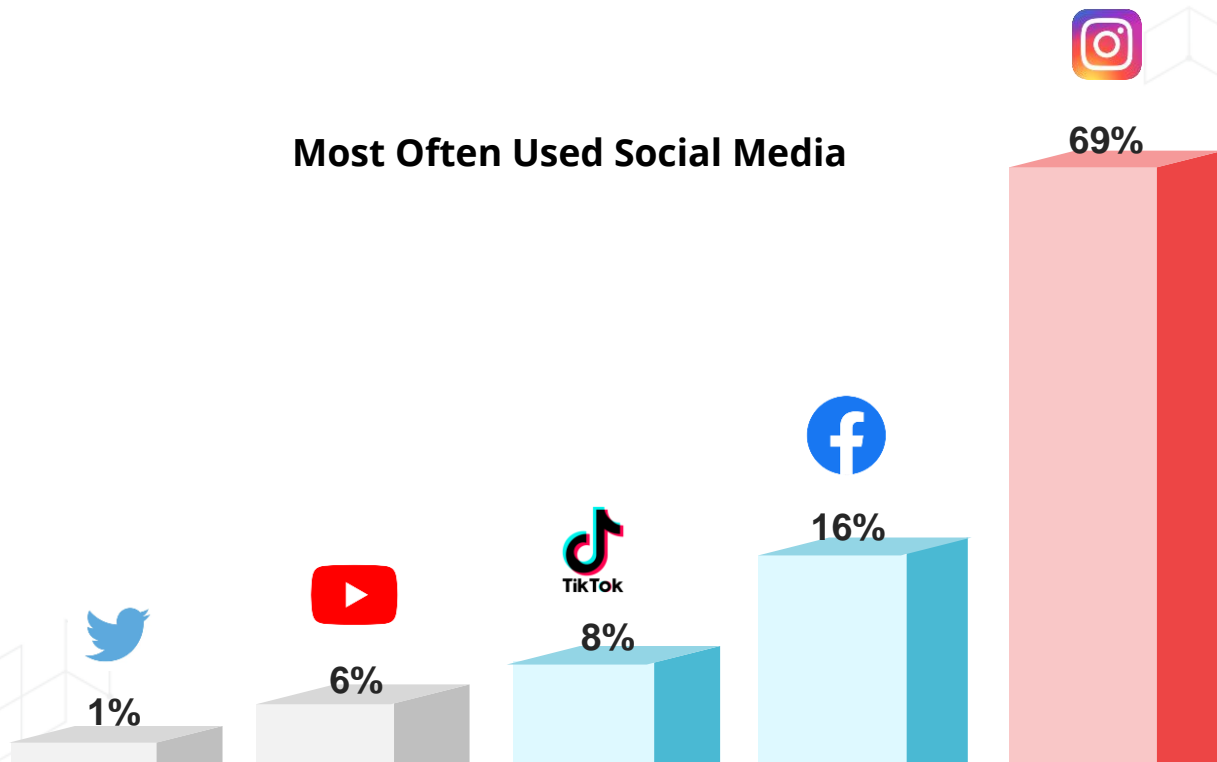
Social Media apps used



Instagram attracts more engagement

Instagram is counting as the most-often used social media app. Furthermore, Facebook and Tiktok still able to engage with moms

Most Often Used Social Media



N=1035 (social media users 2022)

Q: Please select the social media app that you use most often?

Key takeaways

Moms still enjoying creating content this year

Moms loves to share their experiences, photos and product reviews, which they are still **enjoying as creator content** (with 83%)

Key implication:

- Good opportunity for advertisers to amplify their brands in parenting community platform, as moms are now acting as an influencer that could help in promoting the brands.

Short-video advertisement is key

Short-video content is preferred against other types of advertorial content. Majority of moms also prefer turning on their sound when looking at this content.

Key implication:

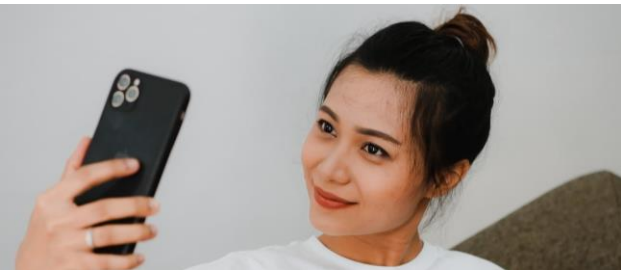
- Advertisers should prioritize short-video content to leverage their users together with the incorporation of good voice over (VO) / ambiance music in the campaign / ad placement.

Scale up holiday-related content, if possible

Aside from parenting tips and giveaways, moms are also enjoy seeing **holiday-related content on their social media platform.**

Key implication:

- Worth for the advertisers to scale up content related to holiday activities or destinations that may draw viewers.





04

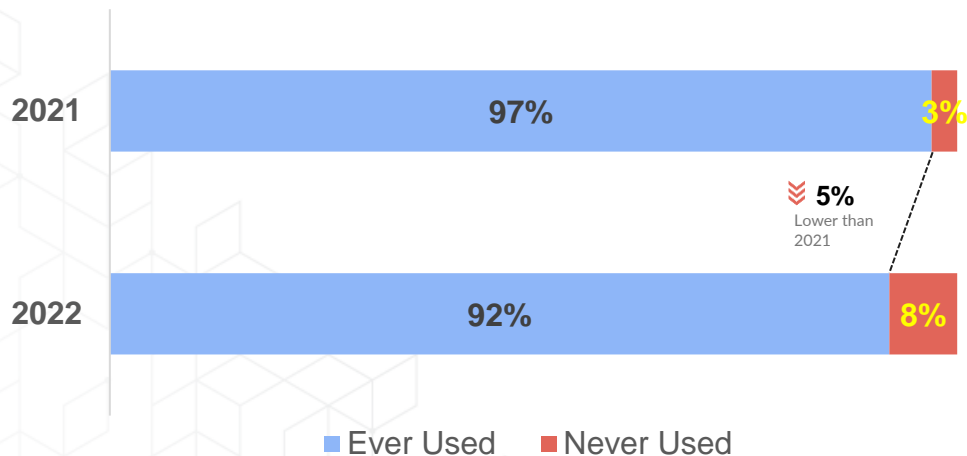
4 Online Shopping Apps



Online shopping usage

Although majority of the moms still use e-commerce; however, there has been a slight decline on usage rate against last year, which is most likely driven by eases of social restriction that allow moms to start offline activities

Do you shop online through e-commerce/ brand's website?



Research will be done by moms before they purchase any products online

Majority of moms (more than 90%) are taking their time for research and reading reviews before purchase any products online



97% of moms would do some research before buying online

Base: 954 (those who shop online)

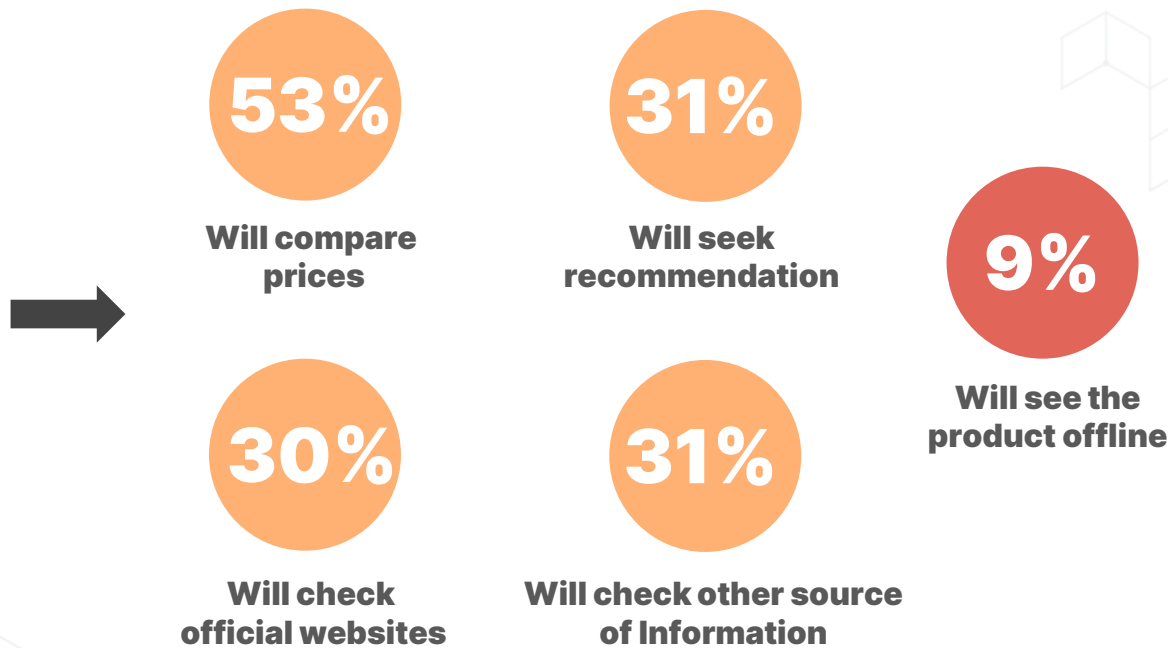
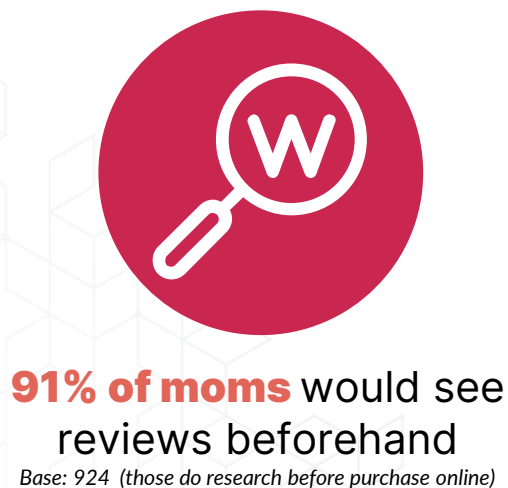


91% of moms would see reviews beforehand

Base: 924 (those do research before purchase online)

Only 9% of moms would also look the product in physical form before decided to purchase online

When it comes to online purchase, reviews plays an important role (with 92%) against comparing prices (with 53%).



Nearly half (42%) of the purchase is planned by moms when decided to buy online

However, only 8% of moms are impulsively purchase (unplanned) the product through online platforms.

How do moms purchase product online?

42%

Always **Planned**
their purchase

50%

Sometimes
Planned &
Unplanned

8%

Purchased their
brand **Unplanned**

Unplanned purchase required seeking more reviews, while planned purchase would seek more product information

	Total	Planned Purchase	Unplanned Purchase
<i>Base</i>	<i>551</i>	<i>231</i>	<i>44</i>
1- 2 blogs/articles	36%	43%	60%
3-4 blogs/articles	51%	45%	30%
5-6 blogs/articles	8%	7%	10%
More than 6 blogs/articles	5%	5%	0%
Average no. of blogs/articles	3.1	3.2	2.5
<i>Base</i>	<i>761</i>	<i>319</i>	<i>61</i>
1-5 reviews	35%	43%	37%
6-10 reviews	38%	34%	41%
11-15 reviews	10%	10%	4%
More than 15 reviews	17%	12%	18%
Average no. of reviews	7.9	7.2	7.9

n=954 (those who using online shopping App / Purchase Online)

Q: Please select all the statements that describes how you often end up buying something for your baby product online

Moms prefer to purchase in online shopping platform

Rather than spending more investment on selling the products in the website; hence, it is better for having improvement on the sales channel that moms usually visit.

Where do you usually buy the items when shopping online?

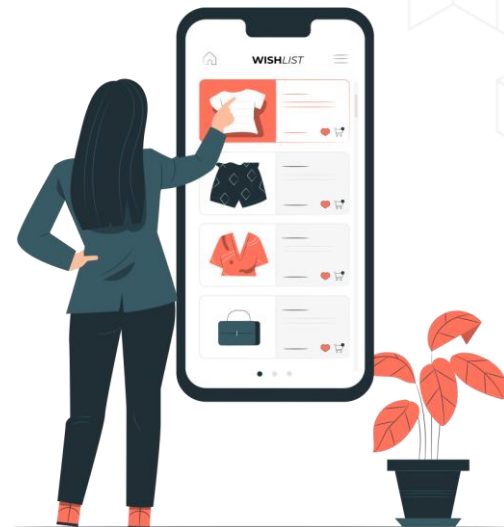
Base – 2022: 954

98%

Usually bought their products through **Online Shopping Platform** (e.g. Lazada, Shopee, Tokopedia, etc.)

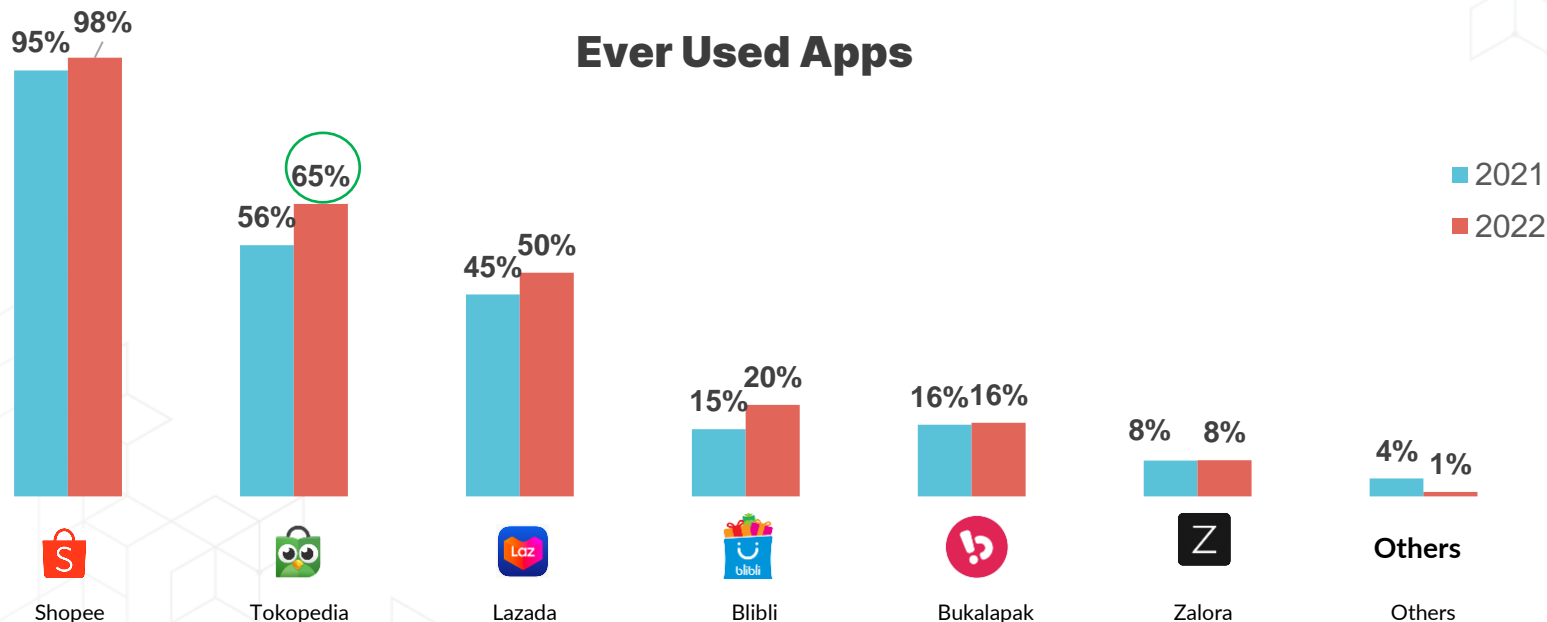
2%

Would purchase through other platforms (brand websites, social media, etc)



Tokopedia is seen to acquire more moms this year

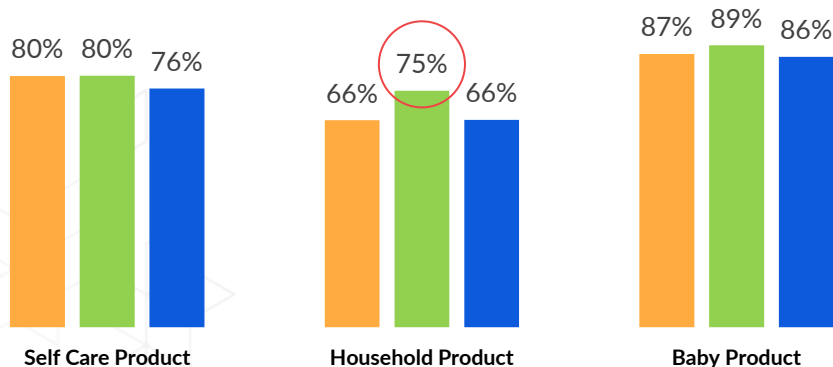
While Shopee still dominates online shopping app used by the moms; however, Tokopedia is seen to gather more users in 2022.



Electronics are more popular in Tokopedia

In 2022, there has been an increase among moms that purchased **consumer electronics** in Tokopedia against other products in the past 6 months.

Shopee Tokopedia Lazada



Category Purchased in the Past 6 Months

Apps Used Most Often

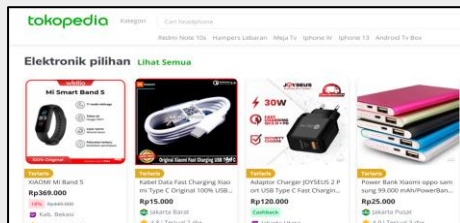


Category purchased in P6M

NETT - Household Products	66%	75%	66%
Household necessities	42%	50%	36%
Groceries	29%	38%	20%
Home accessory items	27%	31%	37%
Consumer Electronics	13%	21%	11%

Significantly higher compared to others

Tokopedia Electronic Campaign



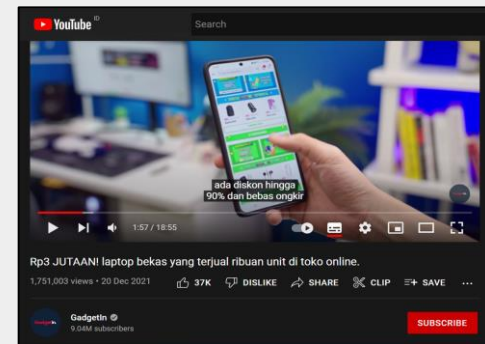
Tokopedia has "Electronics Pilihan" section which appear frequently on their main page.



"Tukar Tambah" is unique feature that is owned by Tokopedia where users could exchange their phones easily.



Tokopedia promotes electronic campaign by holding a giveaway with various electronic gifts such as household electronics and gadgets.

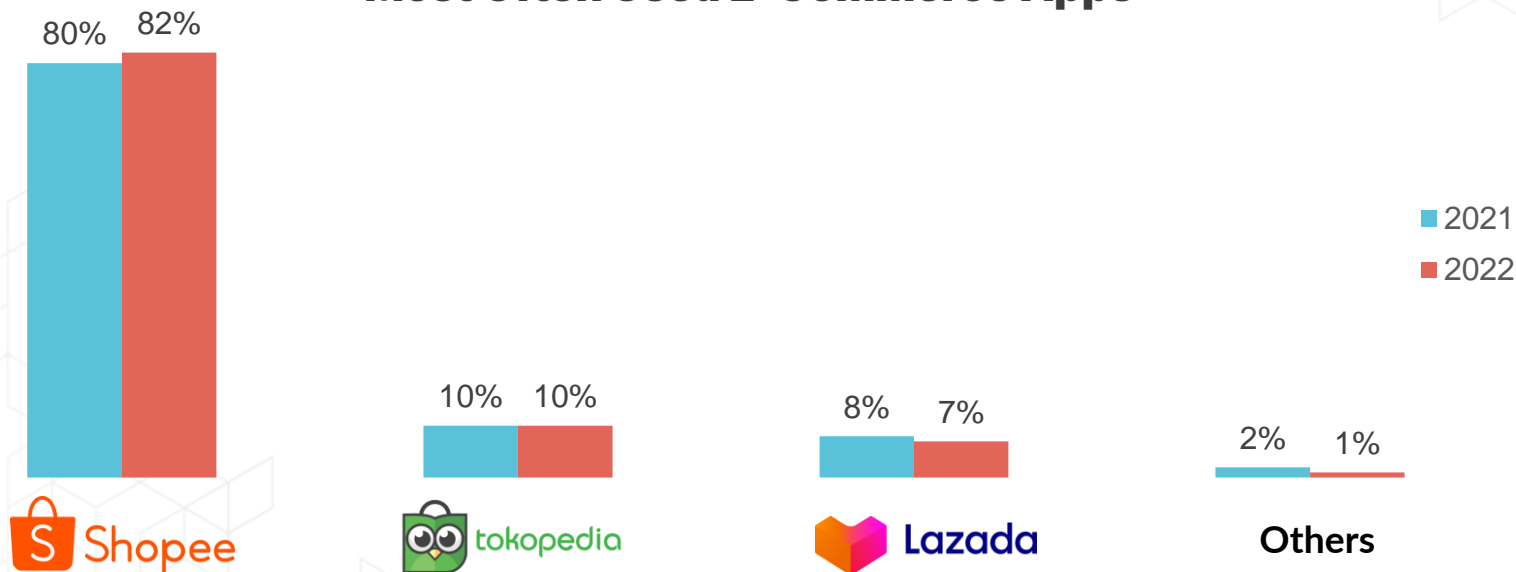


Tokopedia had also affiliated with Indonesian Youtuber "GadgetIn" which has more than 9M subs to help promote Tokopedia app and campaign.

Nevertheless, increasing the presence in Shopee would be the best to engage more moms in online purchases.

Similar score observed between this and last year for most often used apps by the moms

Most Often Used E-Commerce Apps



Moms are also seeking more baby products this year

About 8% of increment (against last year) in baby products to be bought by moms during the past 6 months

2021

82%

Base : 650



Baby Product

2022

90%

Base : 954

Category purchased online in the past 6 months

Significant increase against last year for baby clothes and diapers, which followed by baby care and baby toys



Baby Clothes & Diapers

60% | **74%** ↑



Baby Care - Oil , Creams, Shampoo, Powder etc

59% | **62%**



Baby Toys

42% | **51%**



Baby Food - Solid foods etc*

28%



Formula Milk*

24%



Baby Bottles*

21%

Based on 2021

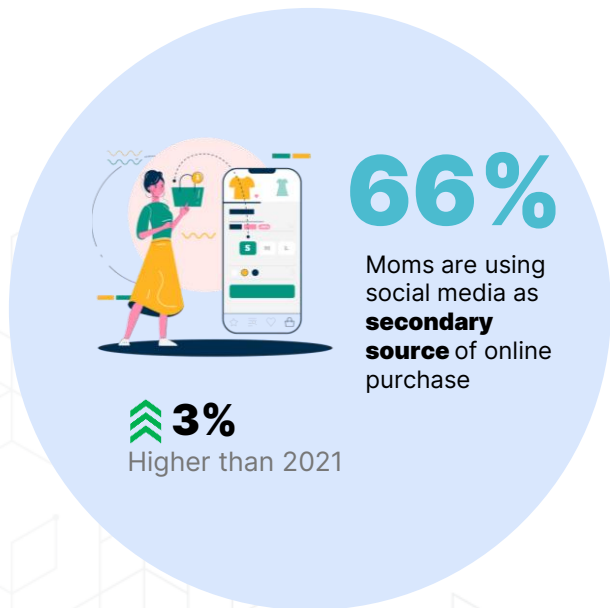
Based on 2022

↑↓ Significantly higher / lower compared to previous year with 95% confidence level

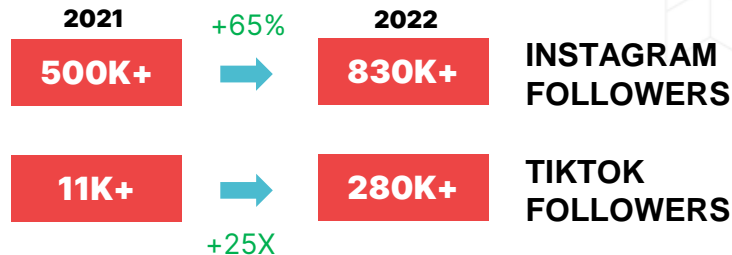
*NOTE: New added product in 2022.

Moms' interest for parenting tips have also increased

Moms are actively seeking information online related to baby and parenting tips. Thus, there is a 3% increase of moms that are actively reading product reviews through social media.



theAsianparent



More moms are seeking information about parenting tips on theAsianparent (TAP) social media platform

Besides baby products, household products have also seen an increment this year

Derived from an increment towards home accessories items (for instance, bedding, pillow, home decoration)



Self Care Product

81%

2021

Base : 650

79%

2022

Base : 954



Household Product

54%

66%



Types of self care products purchased online in the past 6 months

Although self care products in category have slight decreased this year; however, **clothing (not baby)** has significant increased, which probably driven by restarting of normal activities by the moms

Self Care Product



Makeup & Accessories

55% | **36%**



Health & Supplements

51% | **36%**



Clothes (not baby)

39% | **53%**



Skin Care Products*

45%

Based on 2021

Based on 2022

Types of household products purchased online in the past 6 months

Home accessory items have seen to increase significantly this year, which indicates more moms are now willing to take their time to decorate or making their place more comfortable during the pandemic.

Household Products



Groceries (fresh food / frozen food, vegetables, etc)

28%

28%



Home Accessory Items (bedsheet, pillow, etc)

20%

43% ↑



Consumer Electronics*

14%



Household Necessities*

28%

Based on 2021

Based on 2022

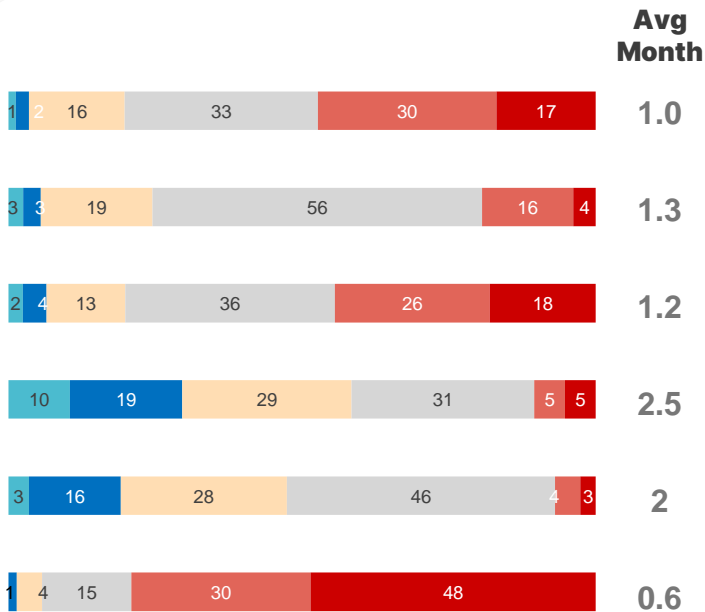
↑↓ Significantly higher / lower compared to previous year with 95% confidence level

*NOTE: New added product in 2022.

How often do moms purchase baby products online?

On average, moms would purchase their baby products once a month whereas for baby foods, it would be twice a month

Baby
Product



2022

Baby clothes & diapers

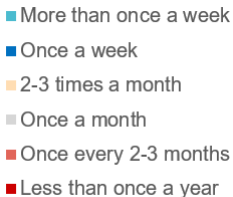
Baby care - oil, shampoo, powder etc.

Baby toys

Baby food - solid foods etc.

Formula milk

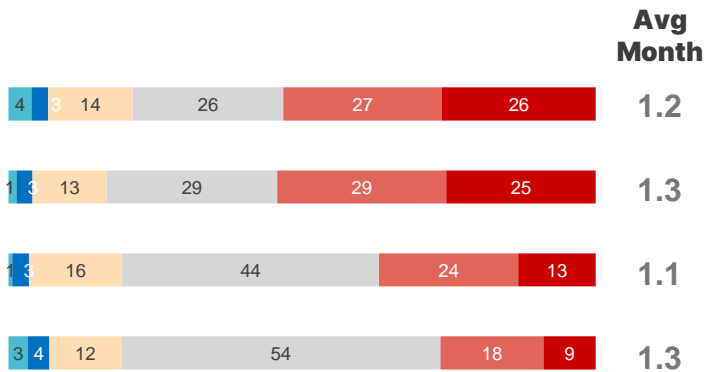
Baby bottles



How often do moms purchase other products online?

A similar pattern is also seen in self-care products and household items (once a month), except for groceries, which are thrice a month.

Self-care product



Clothes (not baby)

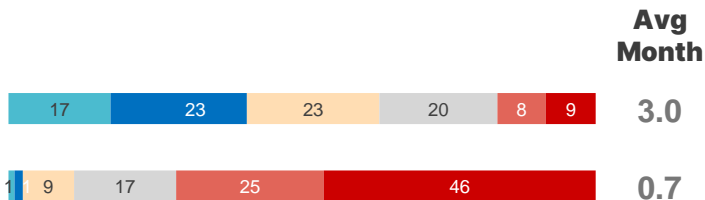
Makeup & accessories

Skin care products

Health & supplements

- More than once a week
- Once a week
- 2-3 times a month
- Once a month
- Once every 2-3 months
- Less than once a year

Household Items



Groceries

Home accessory items

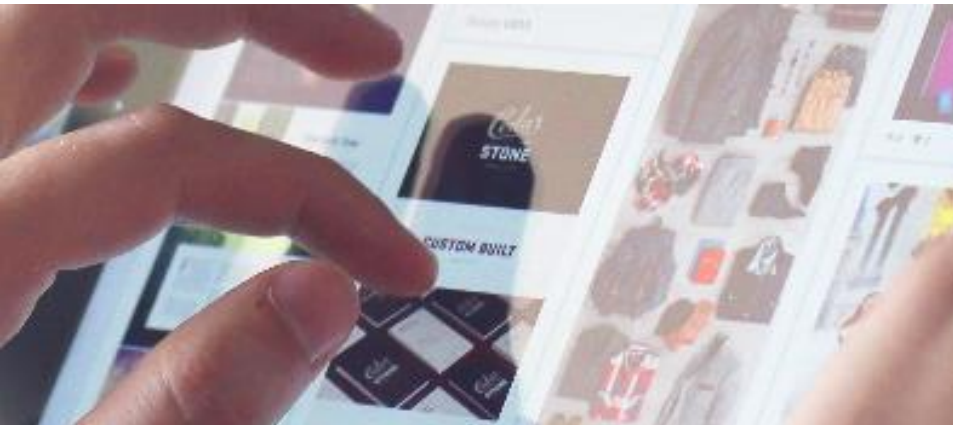
Key Takeaways

Moms sometimes being impulsive when purchase online

Moms can sometimes be impulsive when purchasing any products online (with 8%). This also comes with them taking their time **to seek more reviews** before the actual purchase decision

Key implication:

- Advertisers need to ensure that positive products reviews should be delivered to increase awareness and product trial.



Marketplace over official websites for moms' online purchase

Moms usually **visit the marketplace over official websites for online purchase**. In terms of sales channel, Shopee is still preferred by moms; however, Tokopedia has seen an increased towards electronic products purchased.

Key implication:

- Leverage collaboration to include Shopee or Tokopedia to engage more moms to purchase product online.



Key takeaways

Review first, price comparison came in second

Majority of moms would seek more reviews **before making any online purchase** than comparing prices across other platforms/websites.

Key implication:

- Placing relevant and trusted product review information shall be able to help moms and have a positive influence to purchase.

Baby products purchase have seen an increment this year

Baby products purchase are on the rise this year as more moms would also seek information related to parenting apps and product reviews on social media.

Key implication:

- In 2022, theAsianparent social media platform has seen an improvement and increment of around 50% of followers on Instagram. Therefore, moms are still relying on information that is perceived to be relevant, inspiring and informative.



**SPECIAL
DEAL**

Limited time offer!



The background is a light gray collage of various business and technology icons. These include a laptop, a smartphone, a magnifying glass, a target, a pie chart, a bar chart, a speech bubble, a hand giving a thumbs up, a globe, a dollar sign, a gear, a lightbulb, a location pin, a calculator, a document, a person icon, a plus sign, a minus sign, a multiplication sign, a division sign, a percentage sign, a hash sign, an at sign, a question mark, an exclamation mark, a smiley face, a frowny face, a neutral face, a surprised face, a happy face, a sad face, a angry face, a love heart, a broken heart, a fire, a bomb, a skull, a cross, a heart, a star, a circle, a square, a triangle, a diamond, a pentagon, a hexagon, a heptagon, an octagon, a nonagon, a decagon, a hendecagon, a dodecagon, a trapezoid, a parallelogram, a rectangle, a rhombus, a square, a circle, a sphere, a cylinder, a cone, a pyramid, a cube, a sphere, a cylinder, a cone, a pyramid, a cube, a sphere, a cylinder, a cone, a pyramid, a cube.

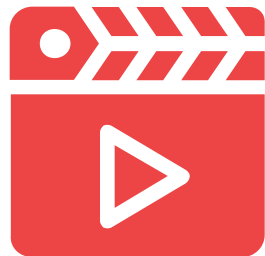
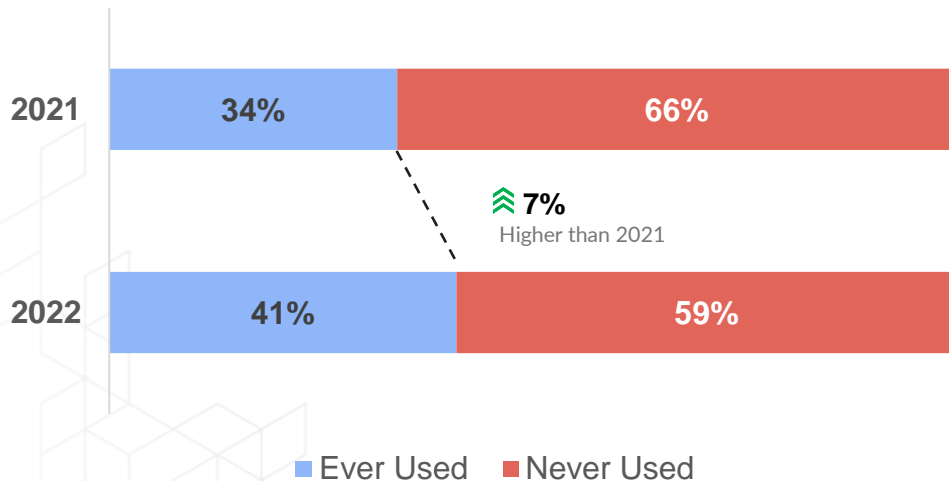
05

Online TV apps

A red megaphone with a black handle, held by a hand, pointing towards the right. It is positioned at the bottom right of the image, with its sound waves represented by a blue speech bubble shape that contains the text 'Online TV apps'.

Despite the decrease in screening time; however, there is an increase membership of any OTT (Online TV streaming) this year

Do you ever use any of Online TV Streaming / Video-on-demand services?

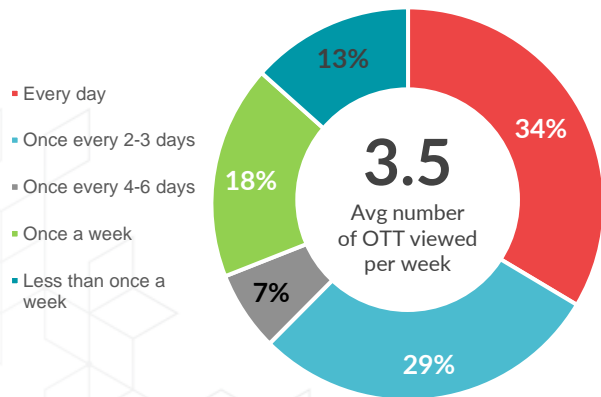


What do moms usually watch?

Drama and movies are still their favorite with an average number of content viewed as high as thrice a week.

How often do you watch TV Streaming / Apps?

Base – 2022: 426



What type of program do you watch?

Base – 2022: 426



80%

Drama



72%

Movies



42%

Anime / Cartoon



16%

Comedy Specials



13%

Documentaries



10%

Reality Shows

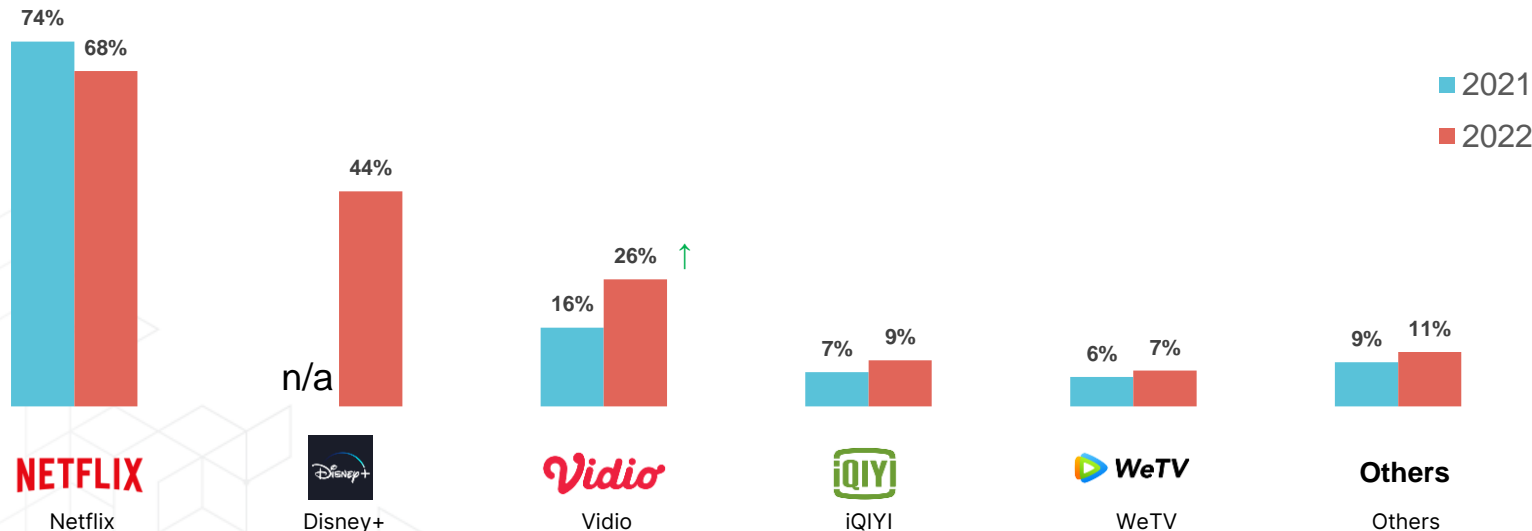


9%

Variety Shows

What TV Streaming Apps / Services used by moms?

Although Netflix still dominates TV Streaming / Apps services; however, it has gradually declined with Vidio has now seen to acquire more of its viewers in 2022.



Base (N=426 (2022); N=230 (2021)); (Those who use OTT services)
Q: Please list down the TV / Streaming apps that you are currently subscribed to!

↑↓ Significantly higher / lower compared to previous year with 95% confidence level
NOTE: Disney+ are New added brand in 2022.

Vidio's Drama and Sport contents increase its acquisition

Pertandingan Pilihan

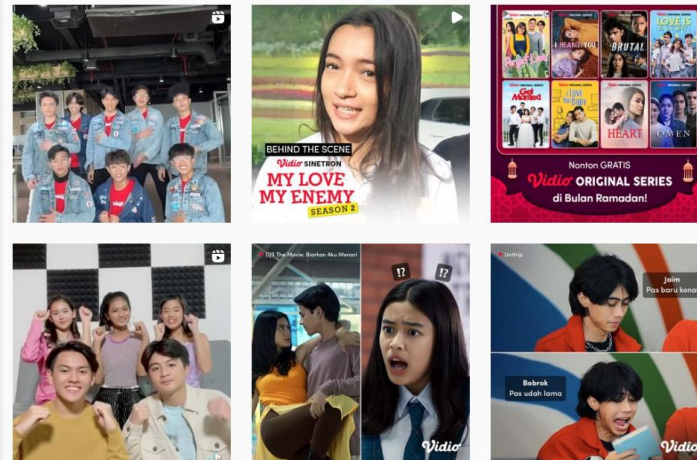


Vidio is famous for its exclusive sports content, especially for its recent badminton match and premiere league acquisition from Mola.

FTV Pilihan



Vidio is also famous for its rich FTV content that also align with moms' interest towards OTT (online TV streaming) for "Drama".



Promotional campaign regarding video original drama series also one of many factors of moms would love to see Vidio compared with other brands.

06

Other Apps



Health consultation App usage

Nearly half of the moms still using e-consultation with Halodoc is preferred and followed by Alodokter, which recently had cooperation with Ministry of Health for covid online consultation.

51%

Using E-consultation App

39%

Lower than 2021

2022 E-Consultation Apps

halodoc

76% | 62%

ALODOKTER

49% | 30%

GrabHealth

13% | 3%

klikDOKTER®

12% | 3%

SehatQ

5% | 1%

OTHERS

2% | 1%

n=554 (e-commerce users 2022)

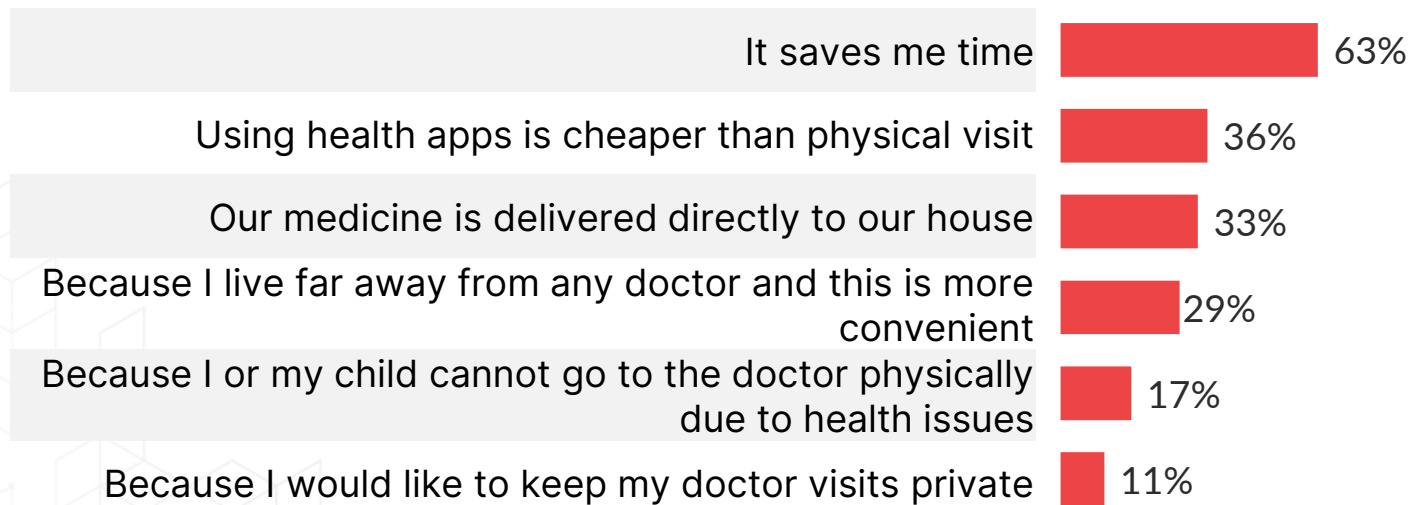
Q: Do you usually do some research for baby product you want to buy online?

Q: Select the top 3 that would take before buying a product online

Ever Use Apps
Most Often Used Apps

Why do moms using e-consultation App?

For those who use e-consultation, saving time and affordable are their key reasons. Convenience aspect has also been mentioned with medicine directly deliver to their door step.



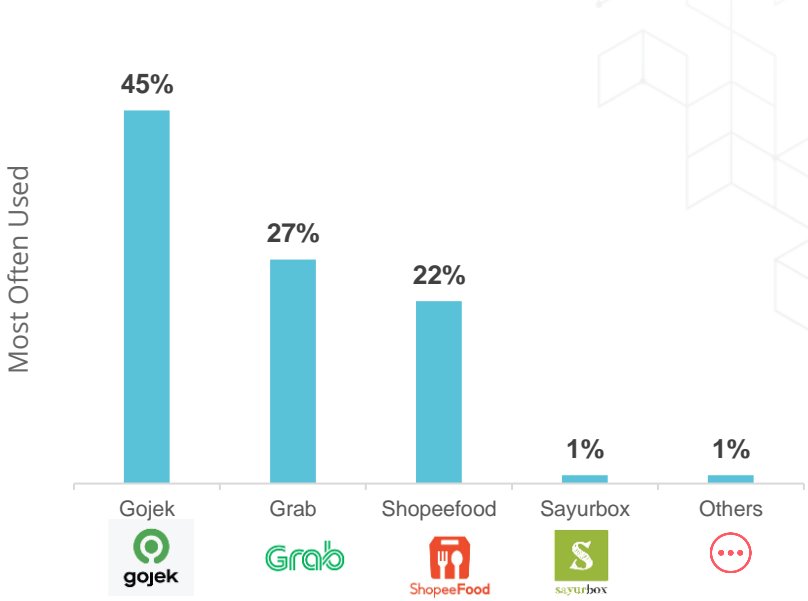
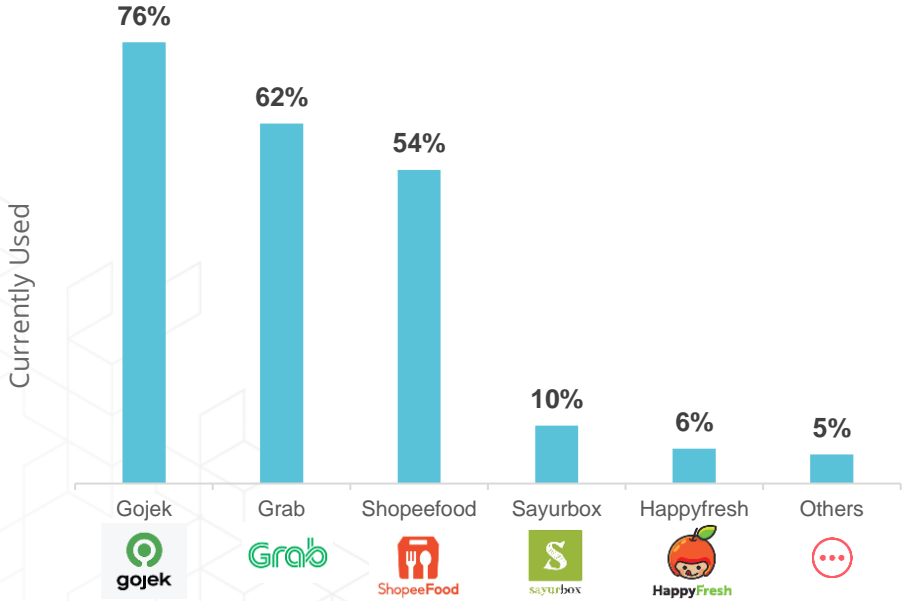
n=554 (e-commerce users 2022)

Q: Do you usually do some research for baby product you want to buy online?

Q: Select the top 3 steps that would take before buying a product online

Food / Groceries Delivery App Usage

As expected, Gojek, Grab and ShopeeFood became the most used delivery apps by moms.

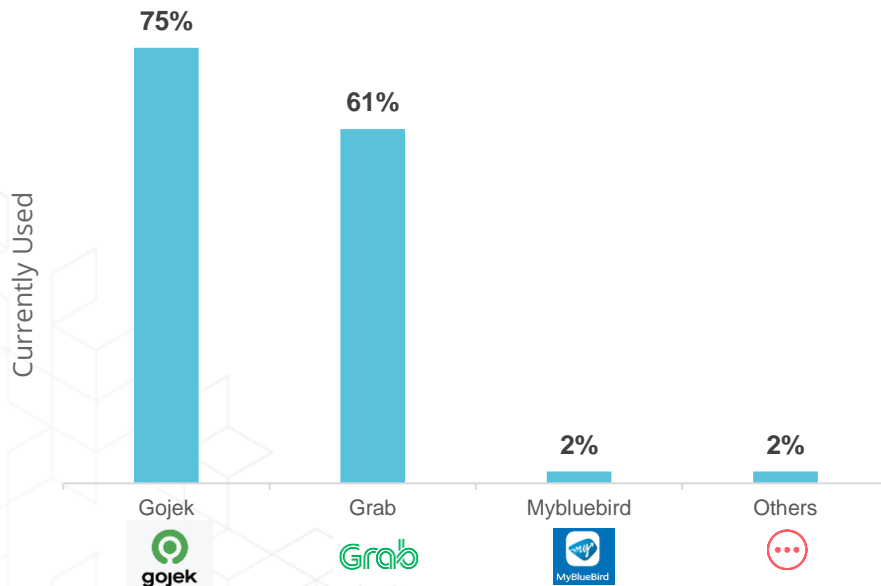


n= 1035 (social media users 2022)
 Q: Please list down the Delivery apps that you currently have downloaded?

n= 931 (social media users 2022)
 Q: Please list down the Delivery apps that you use most often?

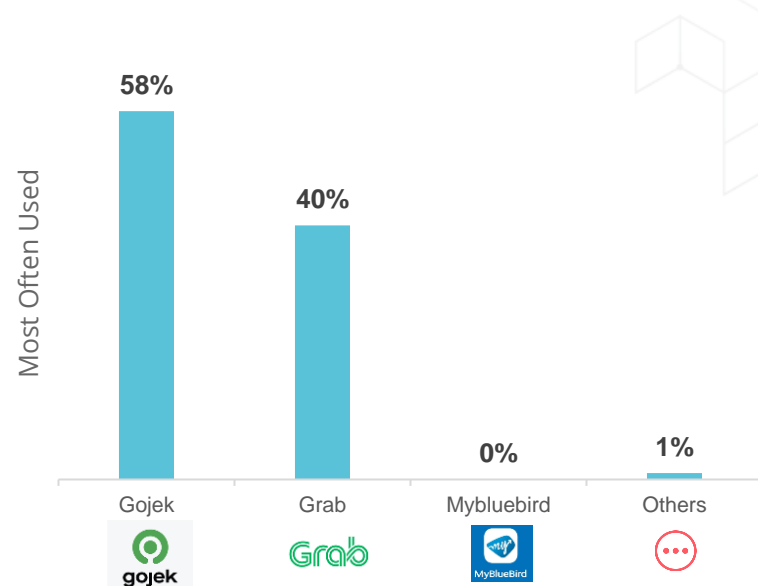
Transport App Usage

Similarly, the most popular transport app is Gojek where 75% of the downloaded and 58% used most often.



n= 1035 (social media users 2022)

Q: Please list down the Transport apps that you currently have downloaded?



n= 908 (social media users 2022)

Q: Please list down the Transport apps that you use most often?

The background is a light gray collage of various business and marketing icons. These include a laptop, a smartphone, a magnifying glass, a target, a pie chart, a bar chart, a speech bubble, a hand holding a pen, a globe, a dollar sign, a lightbulb, a handshake, a person icon, a gear, a document, a calculator, a clock, a thumbs up, a location pin, a speech bubble with a checkmark, a speech bubble with an 'X', a speech bubble with a question mark, a speech bubble with an exclamation mark, a speech bubble with a plus sign, a speech bubble with a minus sign, a speech bubble with a multiply sign, a speech bubble with a divide sign, a speech bubble with a percent sign, a speech bubble with a hash sign, a speech bubble with an at sign, a speech bubble with a dollar sign, a speech bubble with a euro sign, a speech bubble with a pound sign, a speech bubble with a yen sign, a speech bubble with a ruble sign, a speech bubble with a rouble sign, a speech bubble with a dollar sign, a speech bubble with a euro sign, a speech bubble with a pound sign, a speech bubble with a yen sign, a speech bubble with a ruble sign, a speech bubble with a rouble sign.

07

Call to Action



Where and when to communicate with moms?

Placing relevant and engaging contents on social media to catch moms' attention during night-time

Baby products are popular in online shopping

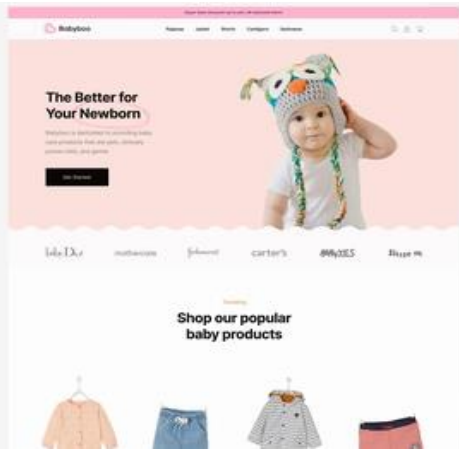
Ensure the availability of online store presence (+8% increment observed against last year)

Social media is now shifting to product influence

Leverage social media platform to build awareness, boost trial and emotionally engage with moms as they are now the content creator

Relying on other reviews instead of checking prices

Consumer reviews are key and the role of influencers become prominent to engage and connect with moms





theAsianparent

THANK YOU

Prepared by:

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Fatih Rahmah Nurlita

Maju Widjaja



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