

Digital Mum Survey Singapore 2022

May 2022

theAsianparent

#1 parenting app in Southeast Asia



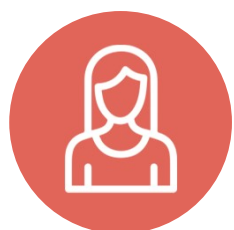
Demographics

Meet our digital mums

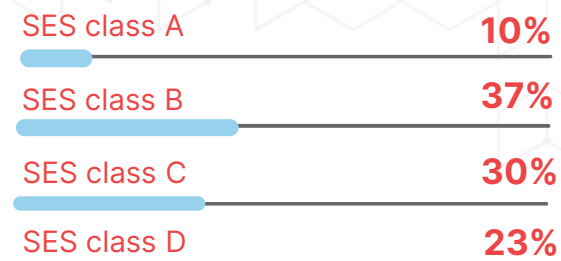
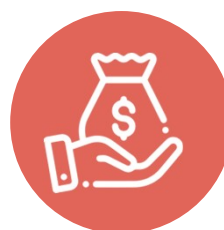
Photo by [Pickawood](#) on [Unsplash](#)



Occupation



SES groups



Age groups

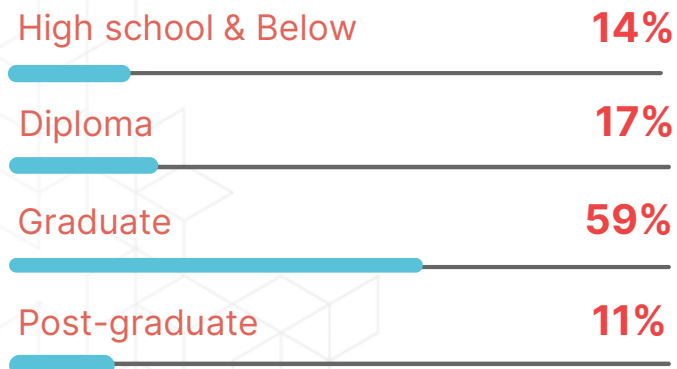


No. of child



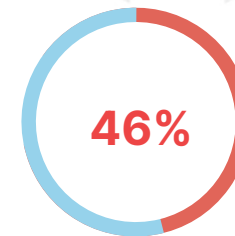


Education

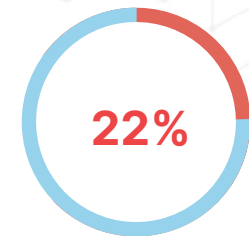


Base: 311, All Respondents

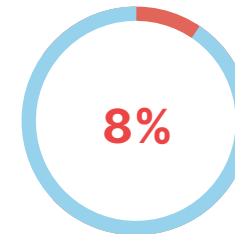
78% of audience are mums with....



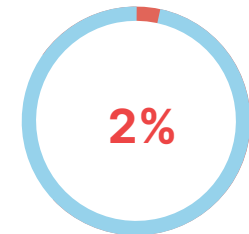
1 Child



2 Children



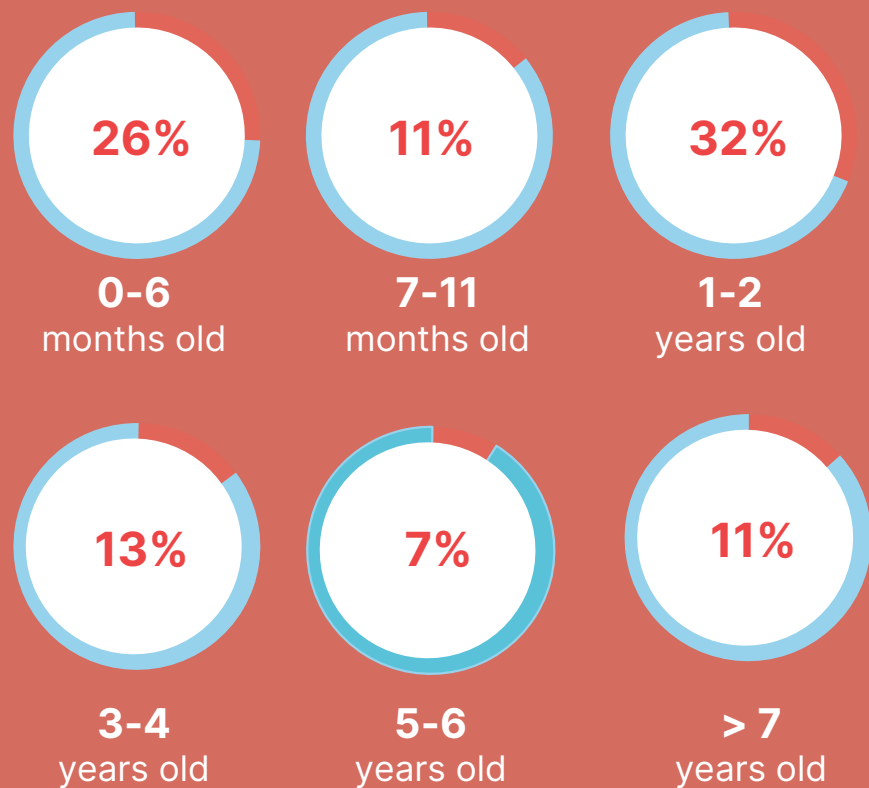
3 Children



More than 3

22% are first-time pregnant

Age of youngest child (amongst those with child/ren)



Base: 244 Mums with children 2022



Device Usage

Mums in multi-screen homes

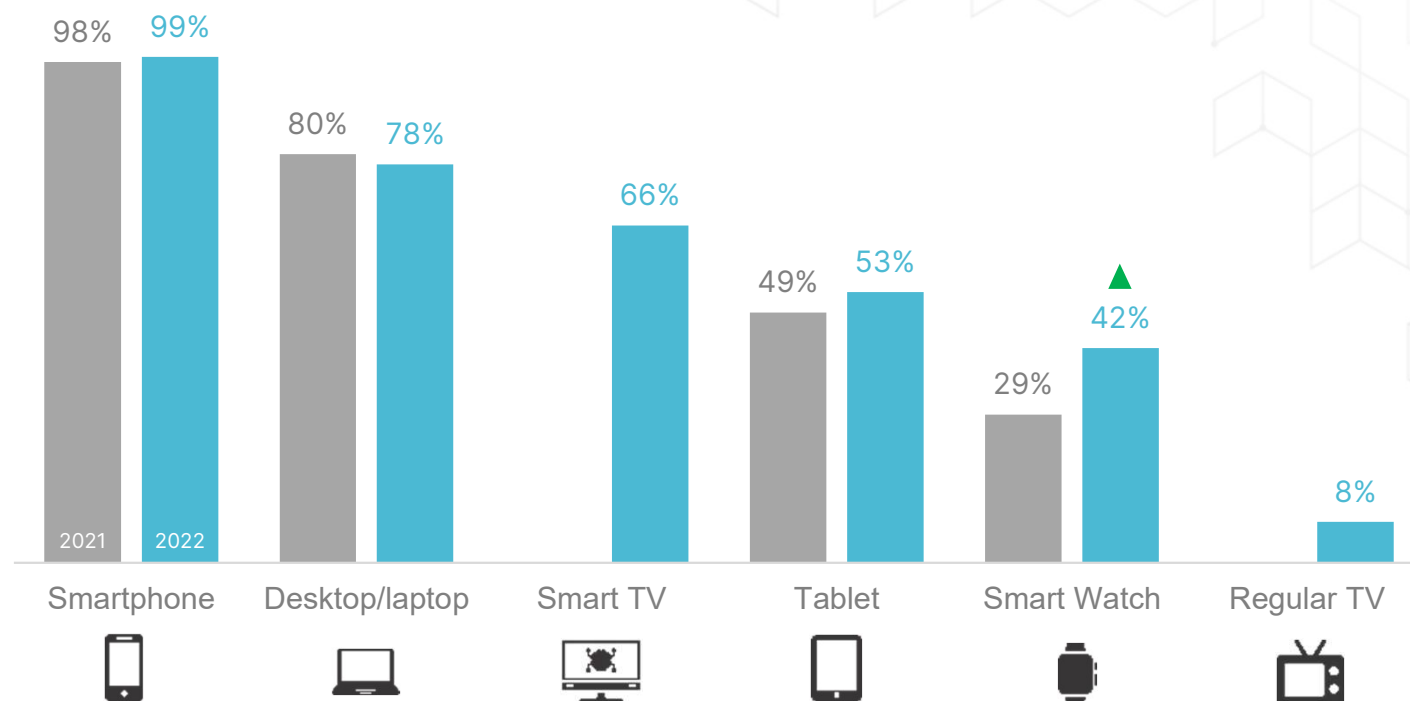
Photo by [Taras Shypka](#) on [Unsplash](#)



Similar to the previous year, **smartphone** is a must-have device for mums. Additionally, smartwatches seem to be on the rise.

Mums own an average of

3.5
screens.

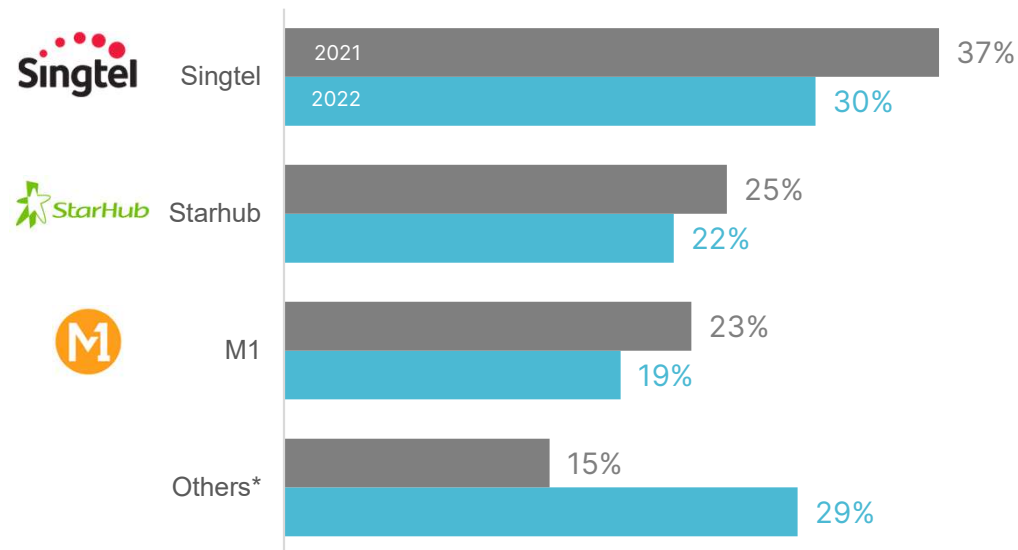
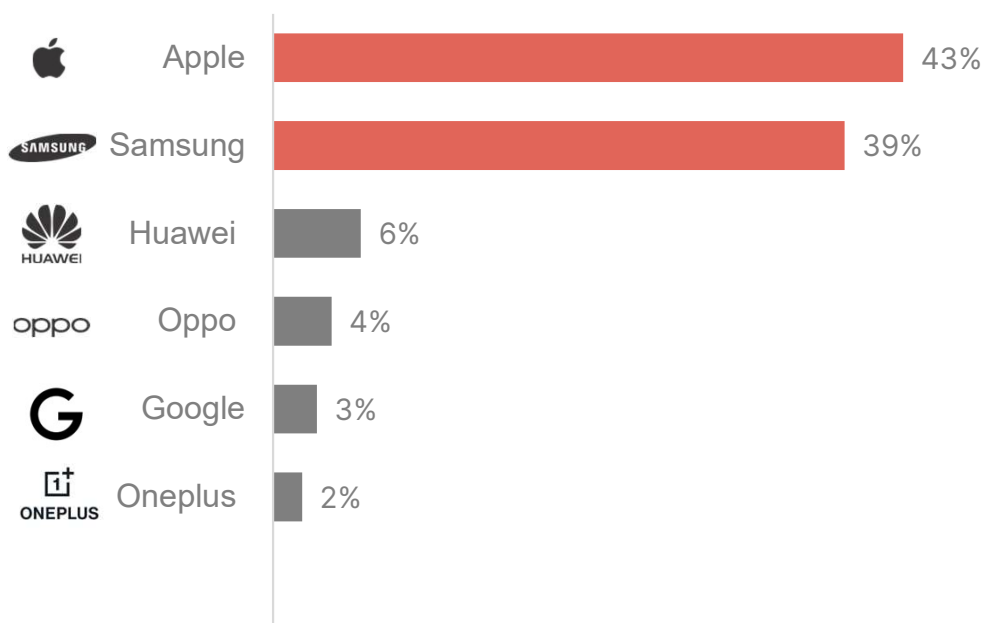


n=776 (all respondent 2021), n=311 (all respondent 2022)
Q: Can you please tell me which of these devices you own for yourself

▲ ▼ Significantly higher at 95% confidence level vs. previous year

Apple and **Samsung** are two main smartphone brands for Singaporean mums.

Singtel remains to be the leading service provider, however, growth was observed in smaller brands resulting in a slight decrease in the 3 major players.



*Others include service providers with smaller shares: CirclesLife, GOMO, Giga!, MyRepublic, TPG, etc.

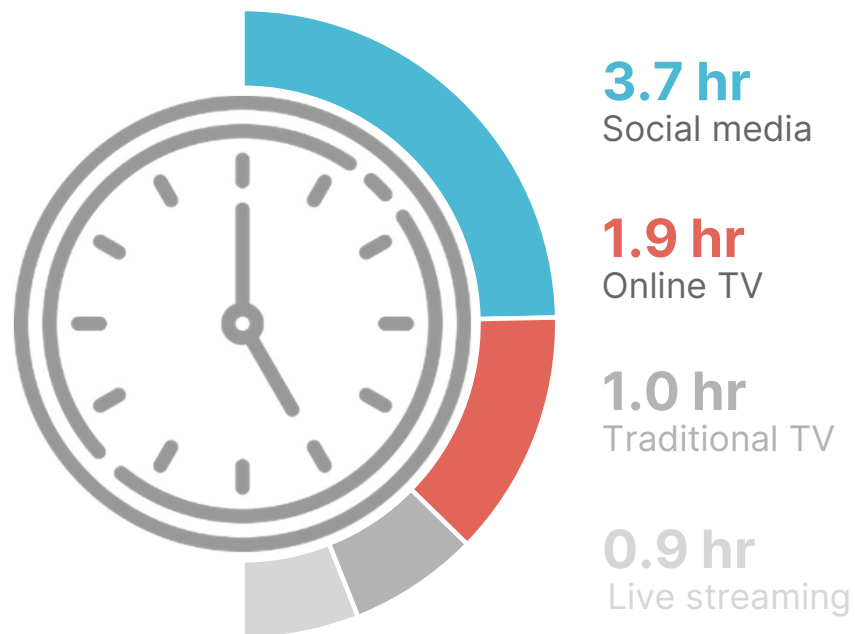
n=311 (all respondent 2022), n=776 (all respondent 2021)

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

Q: Which service provider are you using for your primary/main phone?

Mums spend the most time on **social media** apps, spending at least 3-4 hours per day.

Weekday



Weekend

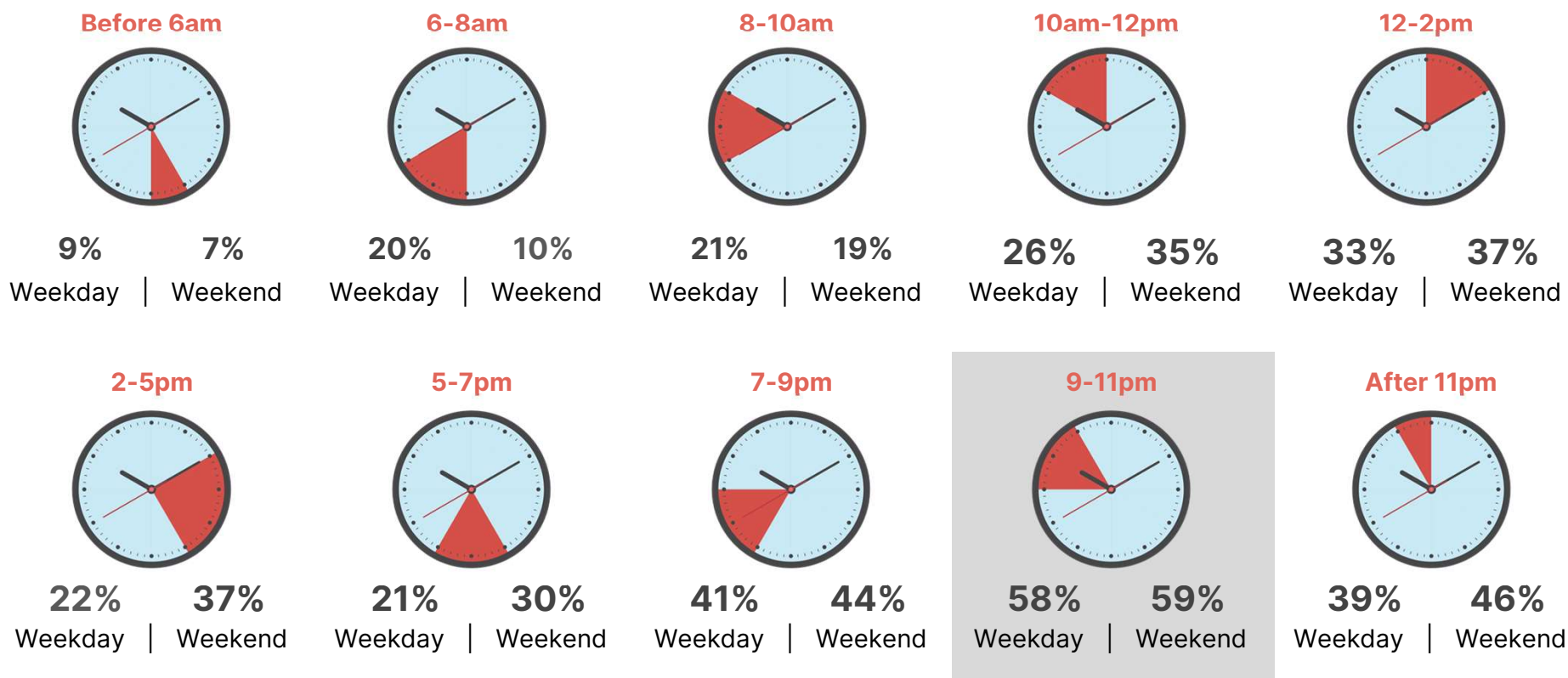


n=311(all respondent 2022)

Q: Can you please record how many hours do you spend on weekdays on each of these app categories?

Q: Can you please record how many hours do you spend on weekends on each of these app categories?

Mums are active at different times throughout the day. **9 to 11 PM** would be the best time to catch them both during weekdays and weekends.



n=669 (all respondent 2022)

Q: What is the time that you use to surf and browse the internet on weekdays and weekends?

Social Media Usage

The increasing appeal of short videos.



Photo by [Jeremy Bezanger](#) on [Unsplash](#)

99%

of mums **use social media** and the most popular social media apps are Facebook and Instagram.

Mums **use multiple social media platforms.**

Average

4.1

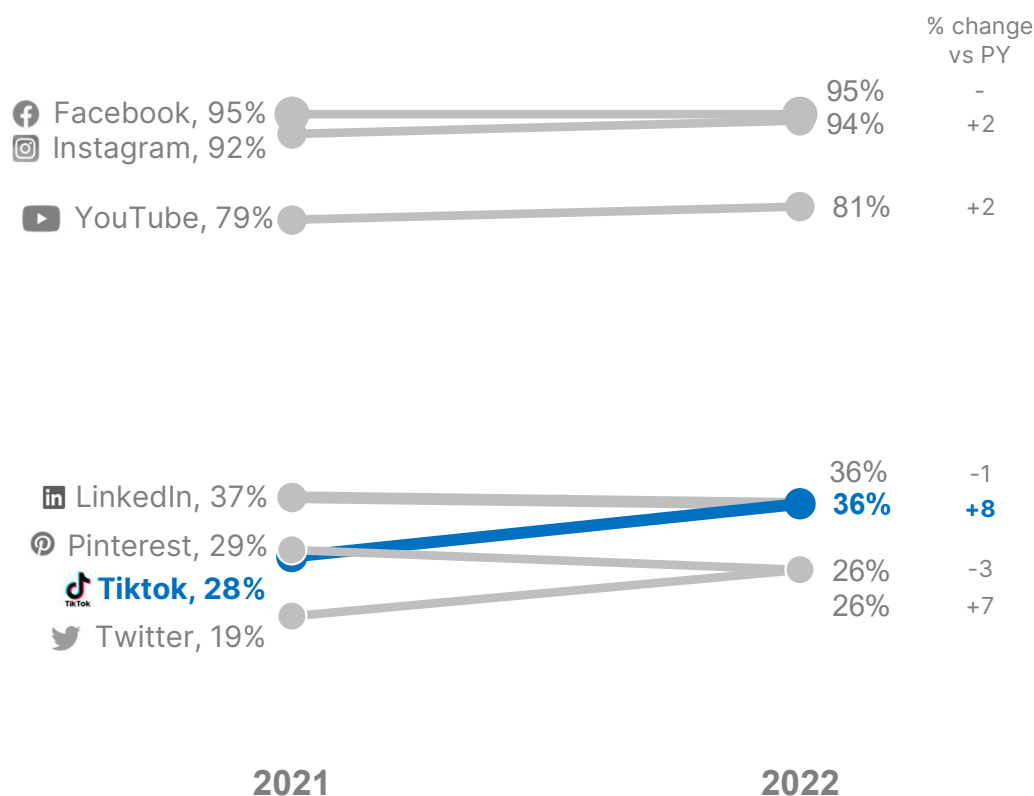
social media platforms

n=756 (social media users 2021), n=307 (social media users 2022)

Q: Do you use any social media apps?

Q: Please select all the Social Media apps that you currently downloaded?

Outside of the usual social media applications, **TikTok** is the biggest gainer in 2022.



▲ ▼ Significantly higher at 95% confidence level vs. previous year

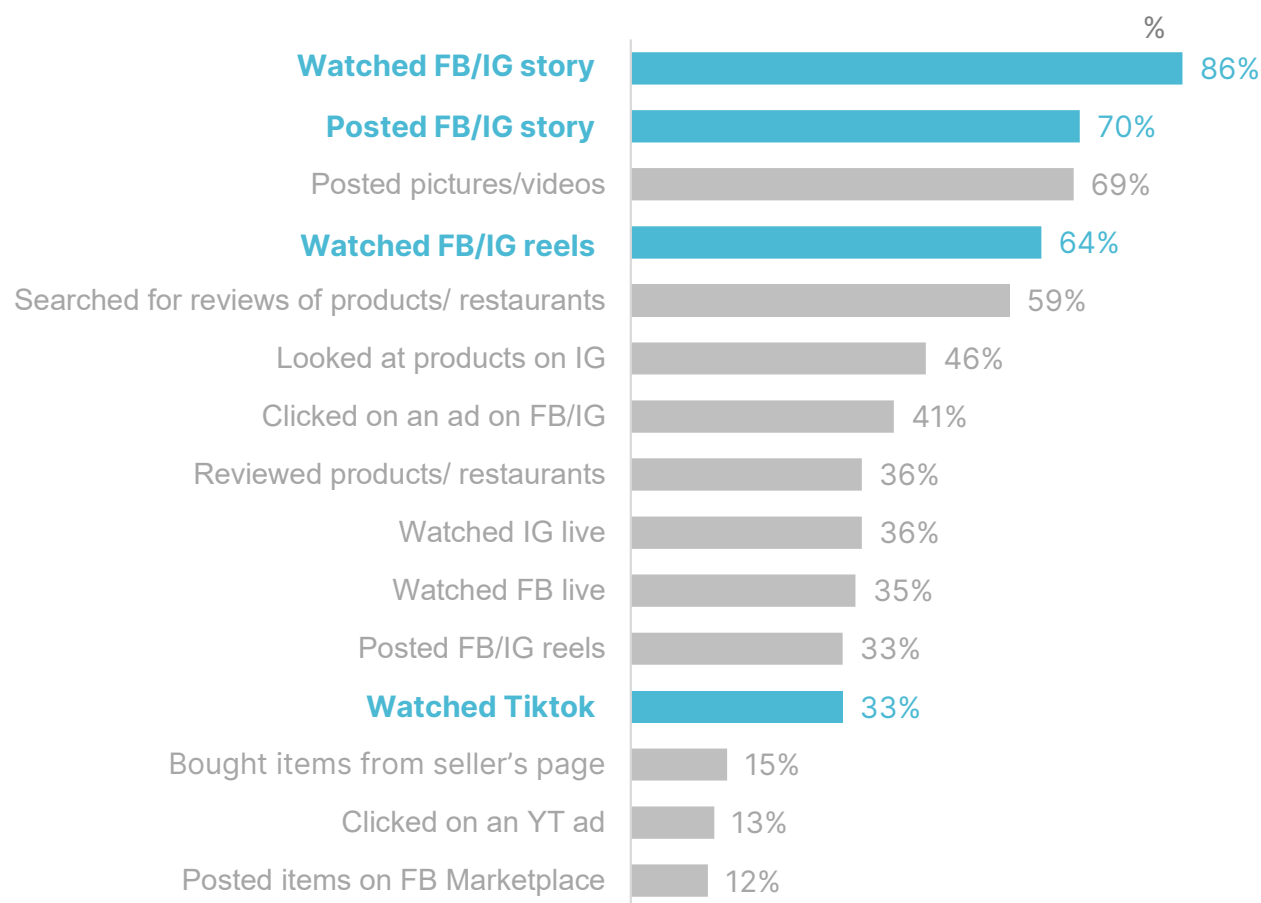
95% prefer to engage with **short-form content**

With even faster internet speed, mums are also drawn to short videos, stories, or reels.

Short-form content – watched or posted FB/IG story or watched or posted reels or TikTok videos

3 out of the 5 popular activities

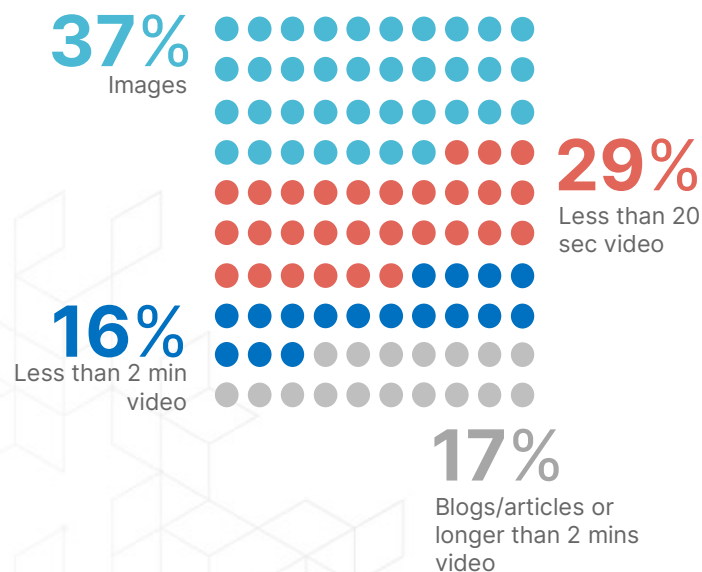
on social media are related to short-form content and these might be the content form that is most relevant to mums currently.



n=307 (social media users 2022)

Q: Please select all the actions that you have done on social media in the past 3 months?

The majority of mums now **prefer short videos** as compared to static content.



n=307 (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?

Depending on the content and situation, mums might watch short-form videos with either sound-on or sound-off.

25% **Sound on** most of the time

54% **Sometimes on, sometimes off**

21% **Sound off** most of the time

Whatsapp is the most popular communication app for Singaporean mums, **Telegram** seems to be up and coming in popularity.



Whatsapp



Facebook Messenger



Telegram



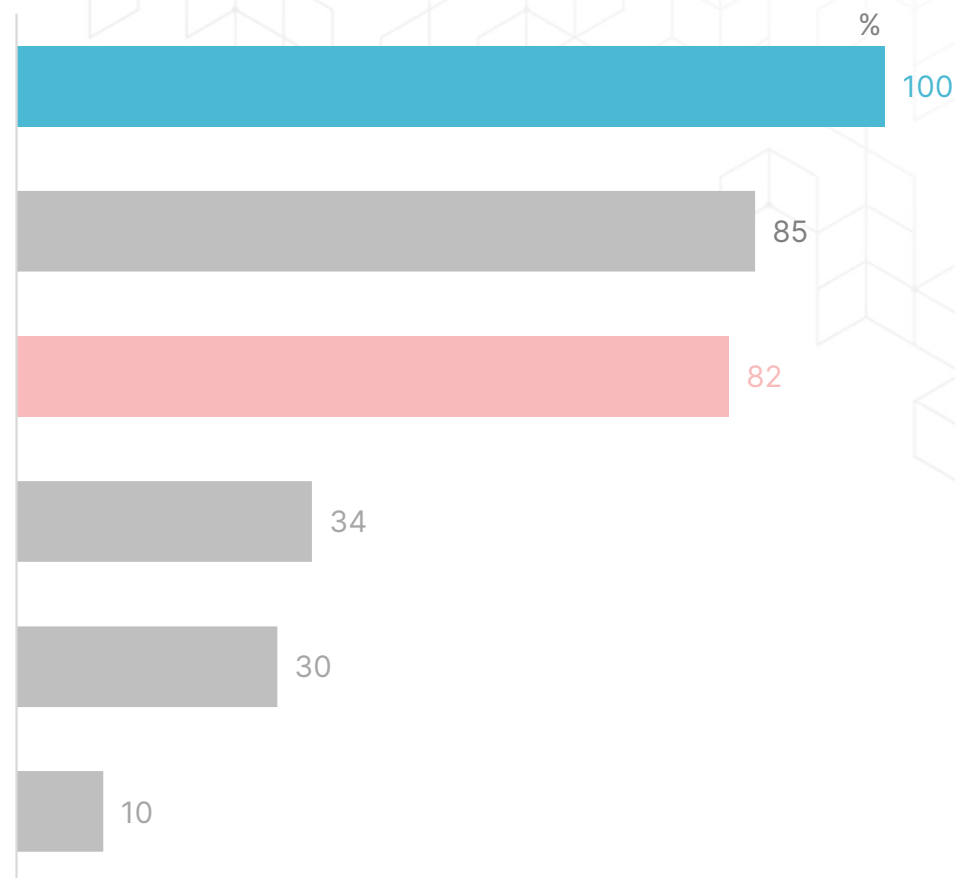
Wechat



Line



Discord



n=311 (all respondent 2022)

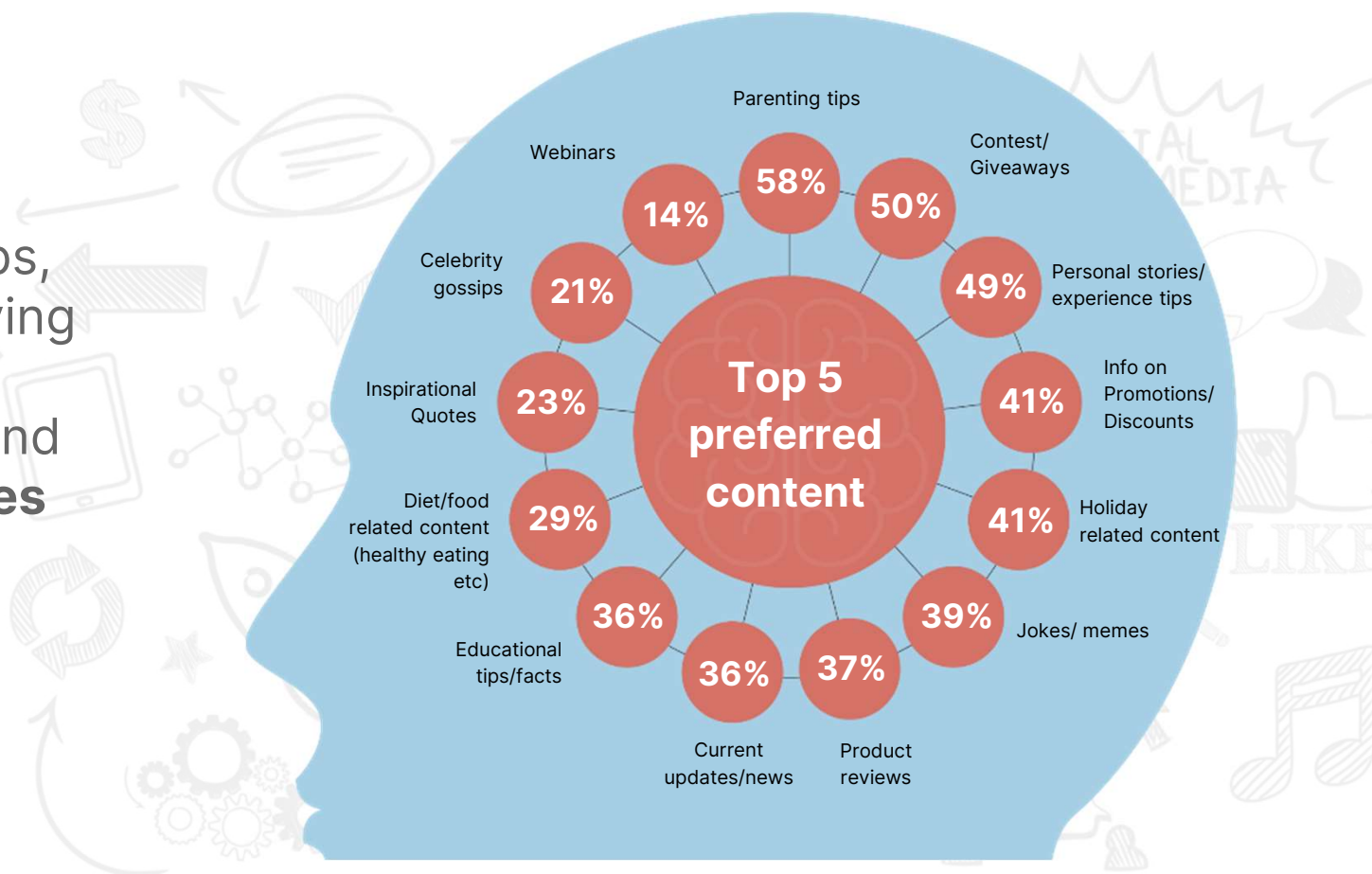
Q: Please list down the Messaging / Video apps that you currently have downloaded?

Q: Please list down the Messaging / Video apps that you use most often?

58% actively seek parenting content

Parenting tips seem to be the most popular content for mums as compared to other topics.

Outside of parenting tips, mums also enjoy receiving information about **contests/ giveaways** and **hearing personal stories & experiences**



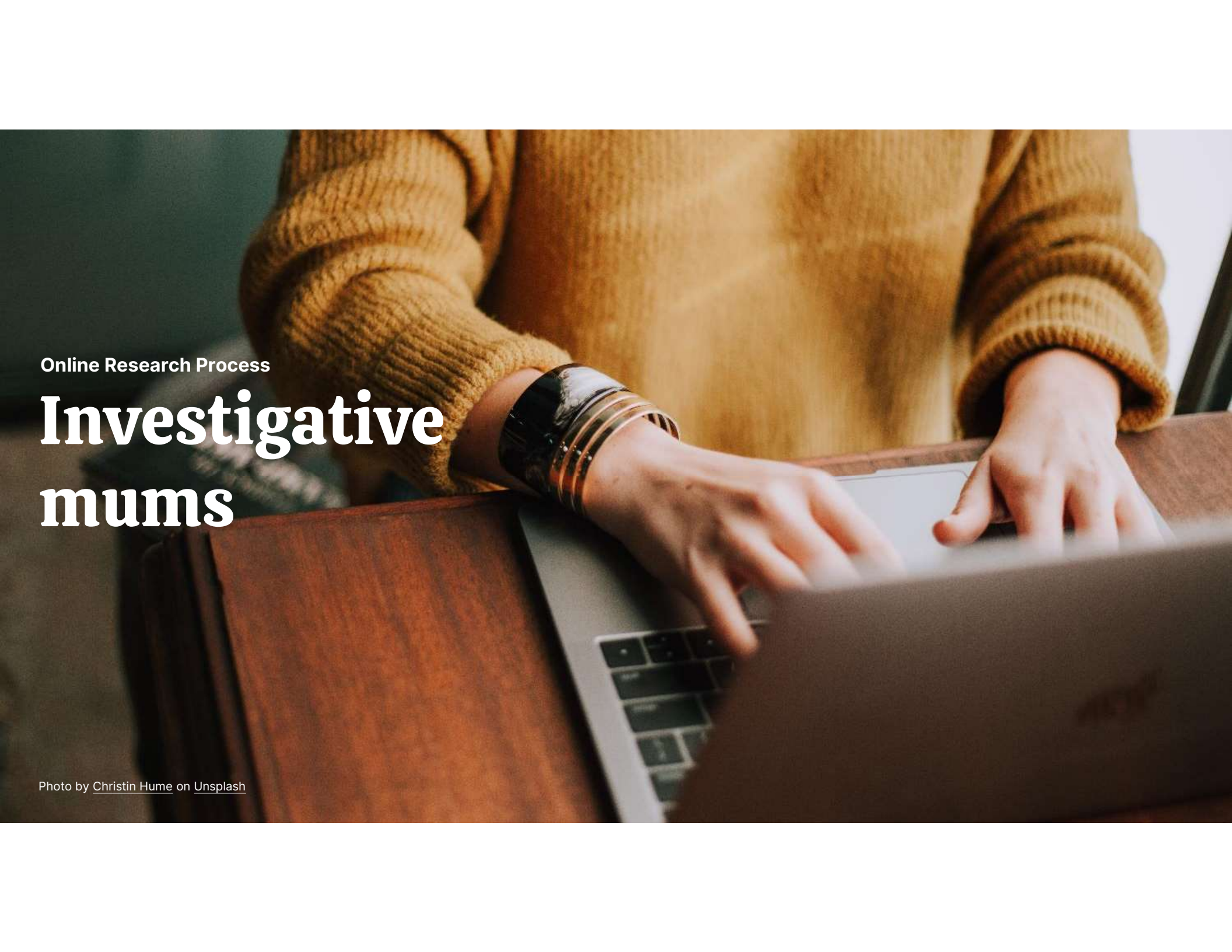
n=307 (social media users 2022)

Q: Please select the top 5 kinds of content you would watch/ enjoy?

Country comparison of popular online content



| | Singapore | Thailand | Indonesia | Malaysia | Philippines |
|--------------|----------------------------------|----------------------------------|----------------------------------|---------------------------------|---------------------------------|
| Top 1 | Parenting tips | Parenting tips | Parenting tips | Parenting tips | Parenting tips |
| Top 2 | Contest/ Giveaways | Current updates/ news | Contest/ Giveaways | Personal stories/ experience | Educational tips/ facts |
| Top 3 | Personal stories/experience | Jokes/ memes | Holidays related content | Current updates/news | Inspirational Quotes |
| Top 4 | Info on Promotions/ Discounts | Product reviews | Info on Promotions/ Discounts | Educational tips/ facts | Personal stories/ experience |
| Top 5 | Holidays related content | Info on Promotions/ Discounts | Inspirational Quotes | Diet/food related content | Jokes/ memes |

A close-up photograph of a person's hands and arms. The person is wearing a mustard yellow, ribbed knit sweater. Their left hand is resting on a silver laptop, which is open on a dark wooden desk. The right hand is also on the laptop, near the keyboard. The person is wearing several bracelets on their left wrist: a black leather cuff, a gold-toned metal cuff, and a gold-toned metal link bracelet. The background is blurred, showing a window with a view of a city skyline.

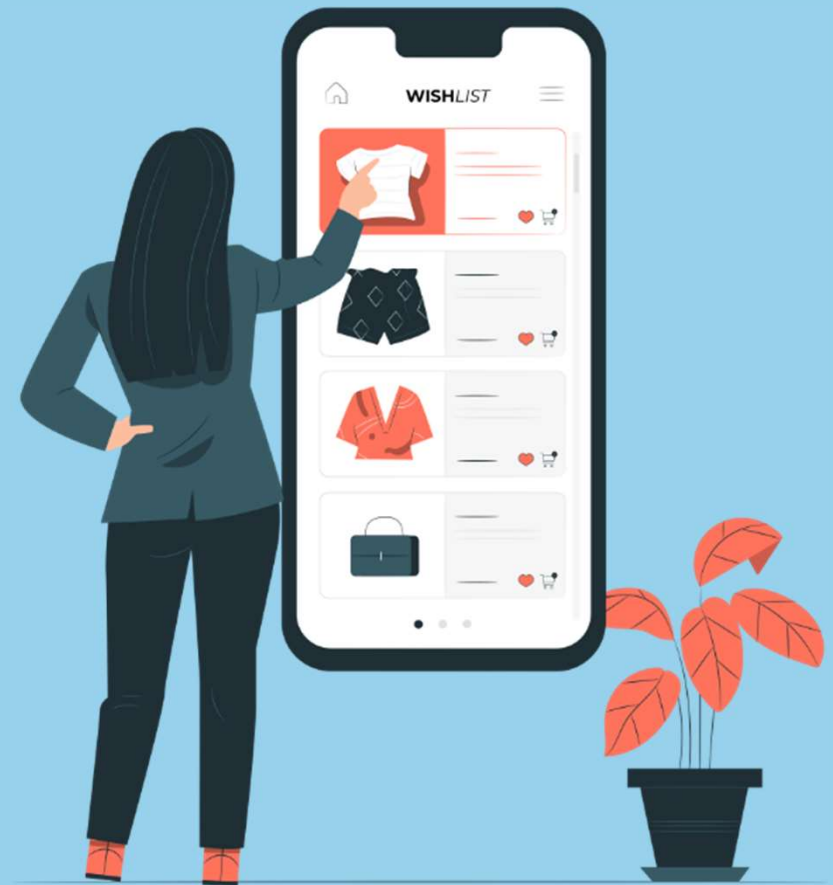
Online Research Process

Investigative mums

Photo by [Christin Hume](#) on [Unsplash](#)

97%

of mums will conduct
research online when they
need something.



When purchasing baby products online, most **mums go through an active research** phase.

Active Search

87%

When I need a product I will do **research online**

Tactical Influence

46%

I was **browsing articles online** and I saw a recommended product

36%

I am intrigued by **online advertisements**

24%

An **influencer** was recommending a product

22%

A product was recommended by an **online shopping platform**

Family or Friends

66%

A **friend or family recommended** and I started to research online or click on the link they shared

Channel Preference

23%

I saw a **new product offline** and decided to do more research online

22%

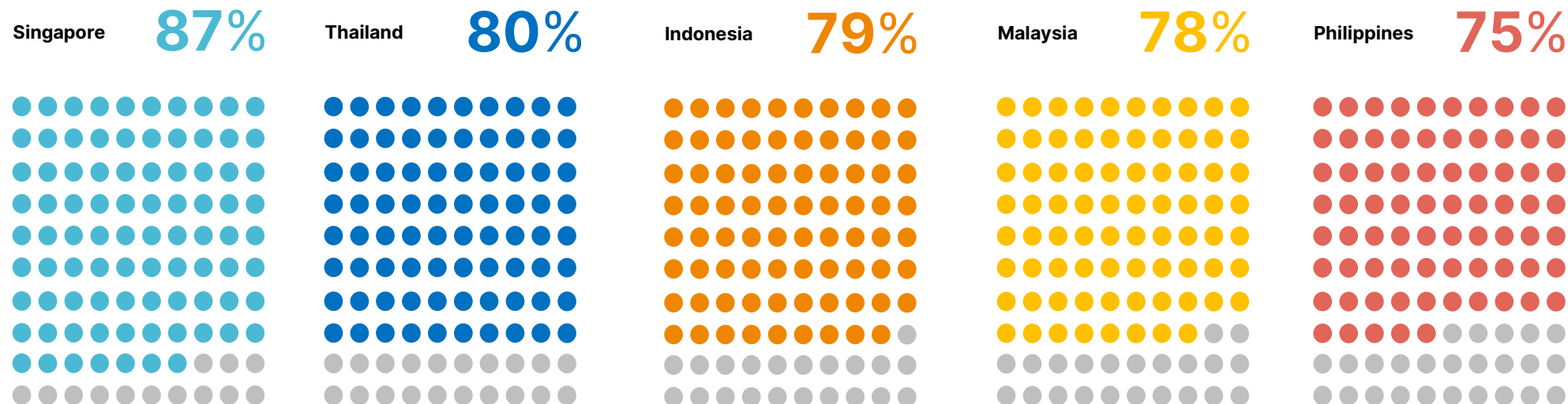
A **product was recommended to me** by an online shopping platform

n=295 (e-commerce users 2022)

Q: Select all the statements that describe how you often end up buying something for your baby online?

When it comes to baby products, most **mums go through an intensive research** phase when buying online.

% of mums who agreed with the statement
"I have the need for a product, and I started to **research online**"



n= e-commerce users 2022

Q: Select all the statements that describe how you often end up buying something for your baby online?

Mums **use multiple sources** before making a decision to buy baby products online.

Search and Social

73%

I **Google** and read up review articles for it

11%

I check the **brand's social media** (FB/IG) for more information

3%

I check for more information on the **social media marketplace**

E-commerce Platforms

72%

I will **compare the prices** across different sellers and platforms

20%

I check the brand's website for more information

53%

I search for the product on e-commerce sites and **read the reviews**

16%

I will look at the product physically before going to buy online

Mum Support Groups

20%

Friends/family recommendation then buy online

20%

I ask **mummy groups** or forums for recommendations

3%

I ask a **health professional**

n=287 (e-commerce users 2022, that does research)

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

Mums **use multiple sources** before making a decision to buy baby products online.

Search and
Social

73%

I **Google** and read up review articles for it

11%

I check the **brand's social media** (FB/IG) for more information

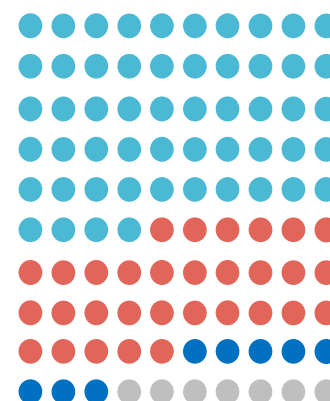
3%

I check for more information on the **social media marketplace**

Most mums will read through 3-4 articles

54%

3 to 4 articles



31%

1 to 2 articles

8%

More than 6 articles

7%

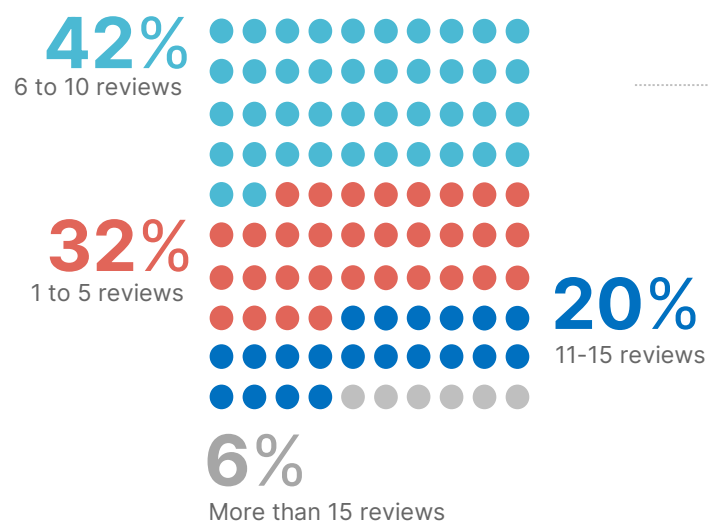
5-6 articles

AVG no. of articles – 3.4

n=216 (mums who read articles to research 2022)

Q: How many articles/ blogs do you read through before coming to a conclusion?

Mums **use multiple sources** before making a decision to buy baby products online.



Most mums will go through 6-10 reviews

AVG no. of reviews – 7.9

E-commerce Platforms

72%

I will **compare the prices** across different sellers and platforms

53%

I search for the product on e-commerce sites and **read the reviews**

20%

I check the brand's website for more information

16%

I will look at the product physically before going to buy online

Mums **combine multiple sources** before making a decision to buy baby products online – reading 3-4 blogs/articles or going through 7-9 reviews.

| | Singapore | Thailand | Indonesia | Malaysia | Philippines |
|--------------------------------------|------------|------------|------------|------------|-------------|
| 1- 2 blogs/articles | 31% | 35% | 43% | 27% | 55% |
| 3-4 blogs/articles | 54% | 52% | 45% | 54% | 40% |
| 5-6 blogs/articles | 7% | 8% | 7% | 9% | 3% |
| More than 6 blogs/articles | 8% | 5% | 5% | 10% | 2% |
| Average no. of blogs/articles | 3.4 | 3.2 | 3.2 | 3.6 | 2.6 |
| 1-5 reviews | 32% | 41% | 43% | 29% | 42% |
| 6-10 reviews | 42% | 38% | 34% | 42% | 36% |
| 11-15 reviews | 20% | 9% | 10% | 17% | 13% |
| More than 15 reviews | 6% | 13% | 12% | 12% | 10% |
| Average no. of reviews | 7.9 | 7.7 | 7.2 | 8.5 | 7.5 |

n= mums who read articles or reviews to research 2022

Q: How many articles/ blogs do you read through before coming to a conclusion? / How many reviews do you read through before coming to a conclusion?

**Indonesia includes planned purchases only*

Other Online Applications

An app for every occasion

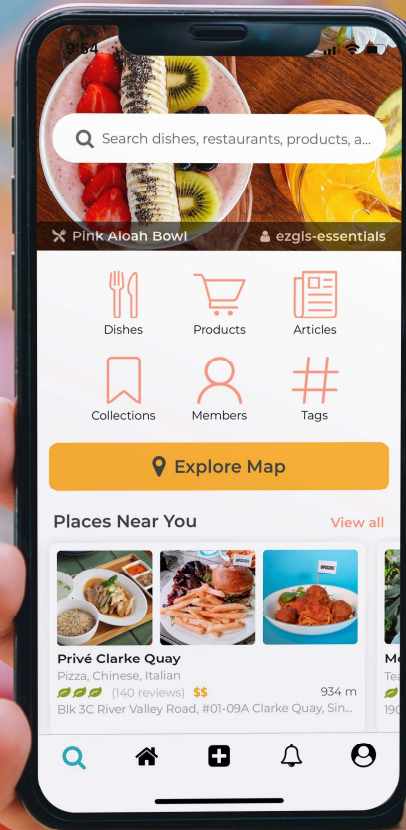


Photo by [abillion](#) on [Unsplash](#)

Top applications used by mums

Social media



Messaging



Online shopping



Show streaming



Food delivery

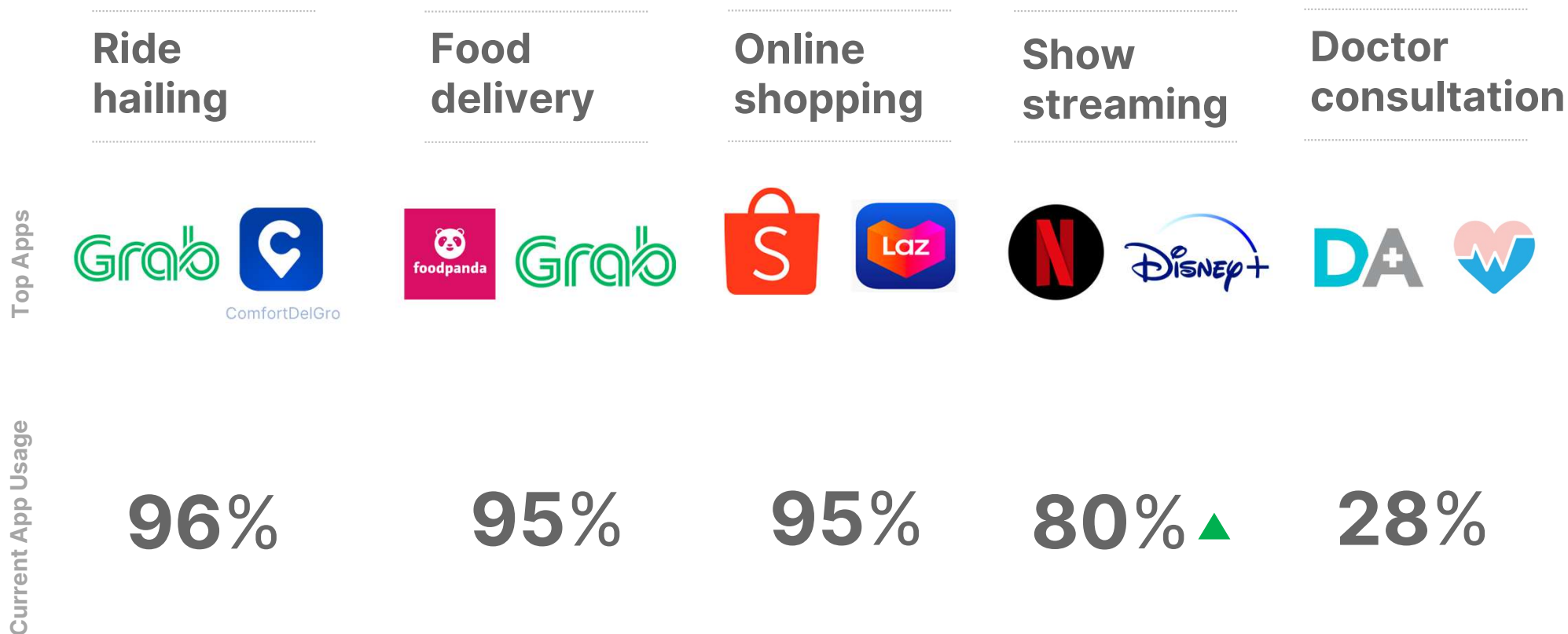


Ride hailing



Doctor consultation



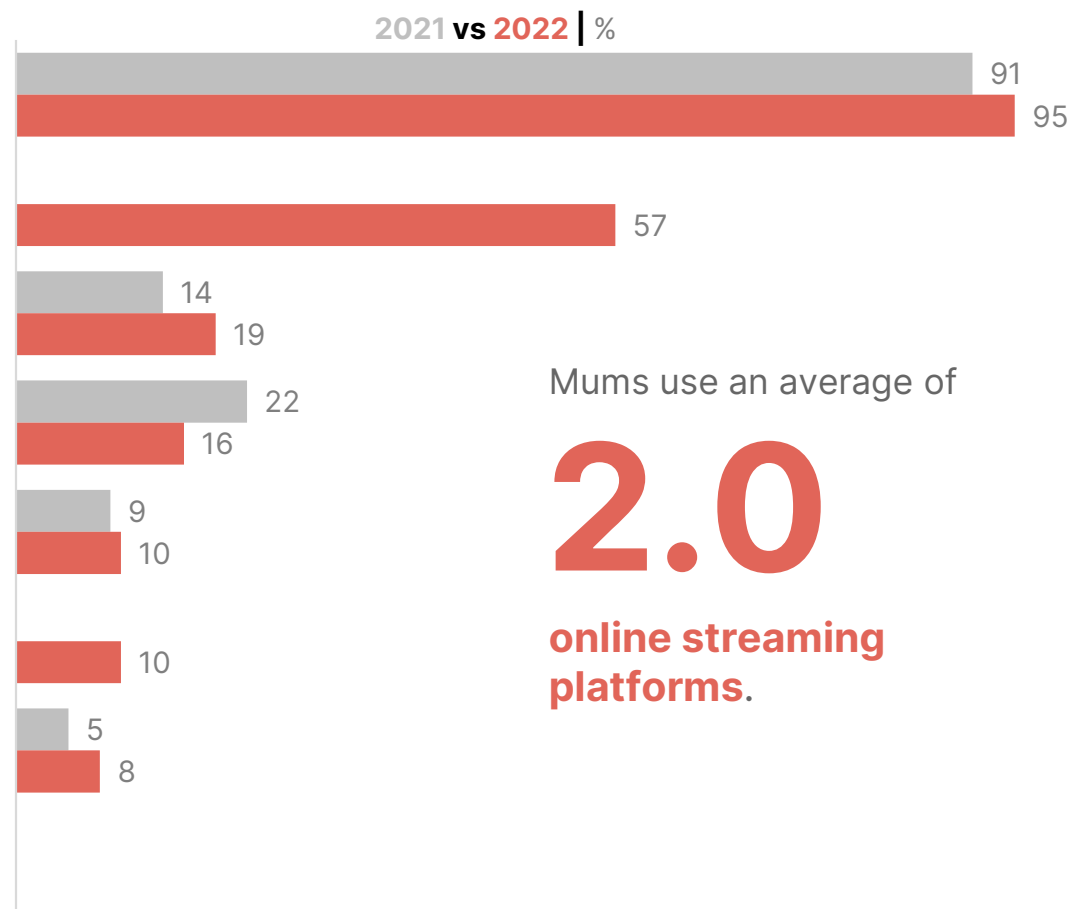


▲ ▼ Significantly higher at 95% confidence level vs. previous year

8 in 10 mums now have access to online TV apps

after another year of living with COVID,
the current rate (80%) is substantially
higher than a year ago (46%).

Unsurprisingly,
Netflix is still the
dominant platform for
online TV, with
Disney+ and Amazon
Prime Video following
behind.



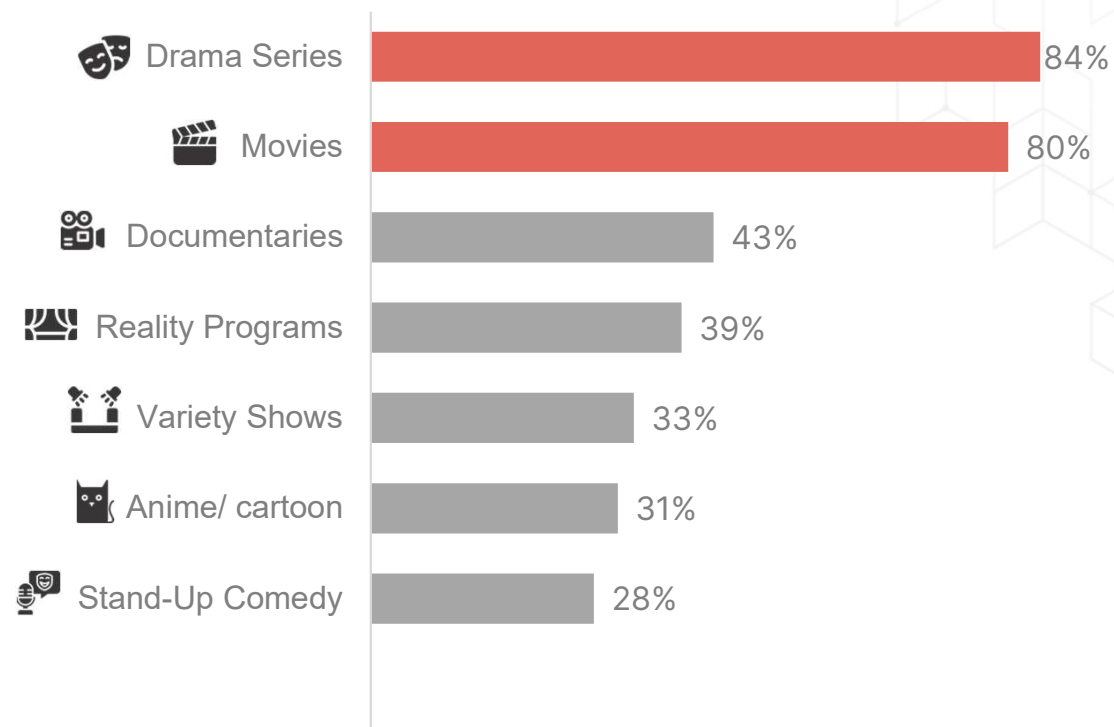
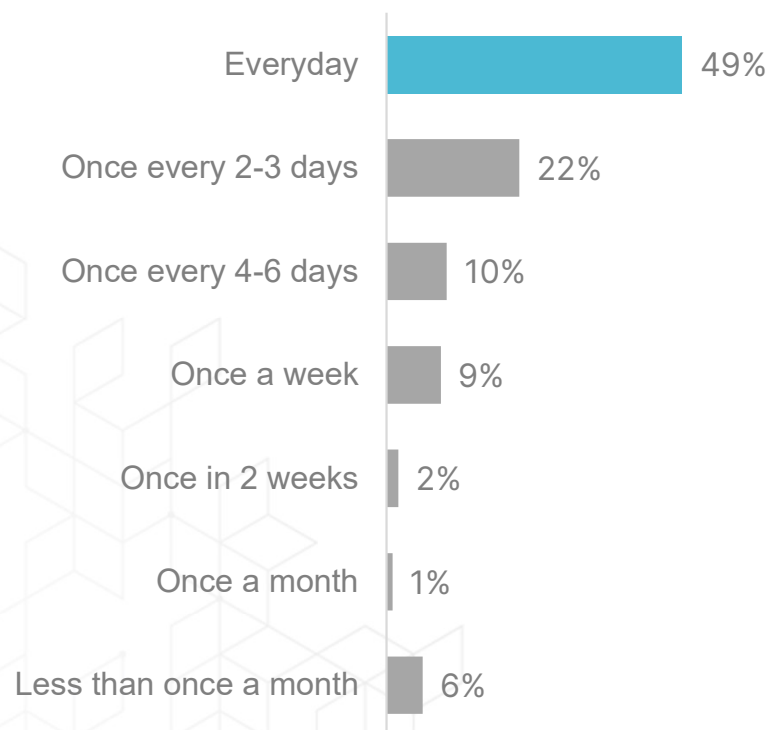
Mums use an average of

2.0

**online streaming
platforms.**

*n=360 (Online TV users 2021), n=249 (Online TV users 2022)
Q: Please list down the TV/Streaming apps that you are currently subscribed to?*

Half of mums watch online TV **everyday** and the most popular genre are **drama series** and **movies**.

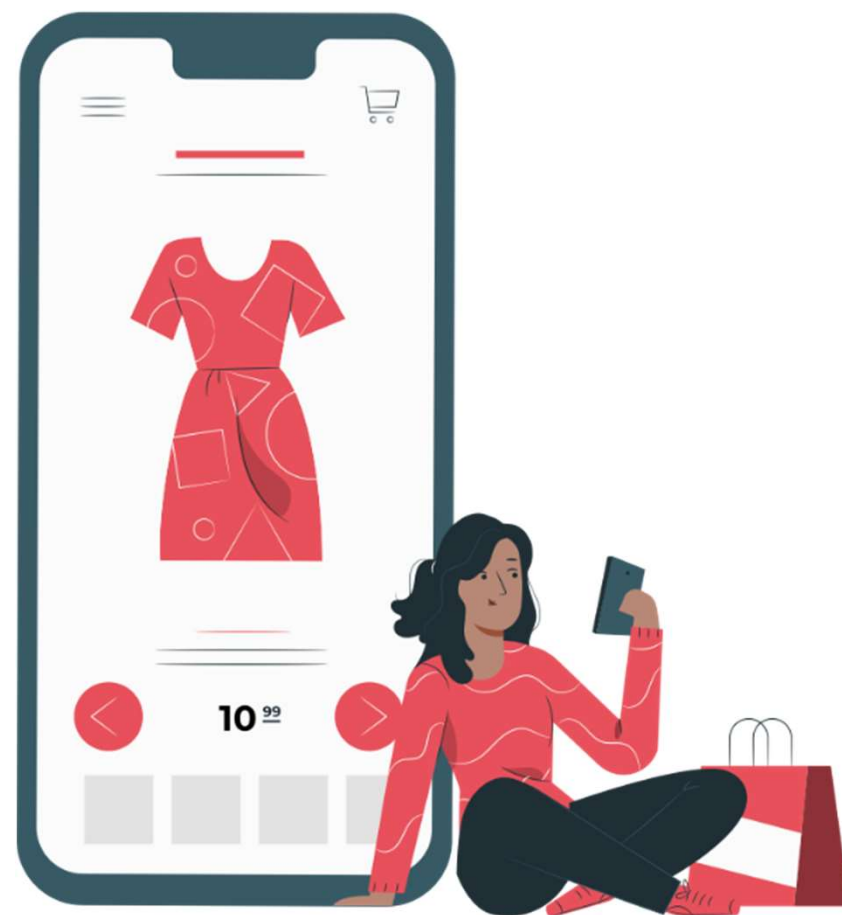
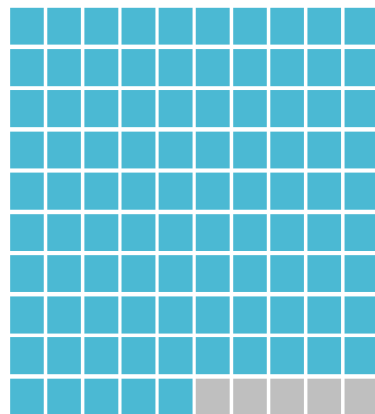


n=249 (Online TV users 2022)
Q: How often do you watch streaming TV?
Q: What type of programs do you watch?

Majority of mums still **use e-commerce**, with similar usage rates as compared to last year even after social restrictions have been released

95%

are using e-commerce platforms, similar to last year (96%)



n=776 (all respondent 2021), n=311 (all respondent 2022)
Q: Do you shop online through e-commerce/ brand's website?

Listing on e-commerce sites will make the most impact when selling products online.

95%

Online shopping platforms
like Shopee or Lazada

5%

Brand's official website

1%

Social media marketplace

n=295 (e-commerce users 2022)

Q: Where do you usually buy the items when shopping online?

theAsianparent
Online shopping behaviour

Shopee still dominates as the top e-commerce platform, followed by Lazada.

97% | **74%**
All used | Most used



Shopee

90% | **18%**
All used | Most used



Lazada

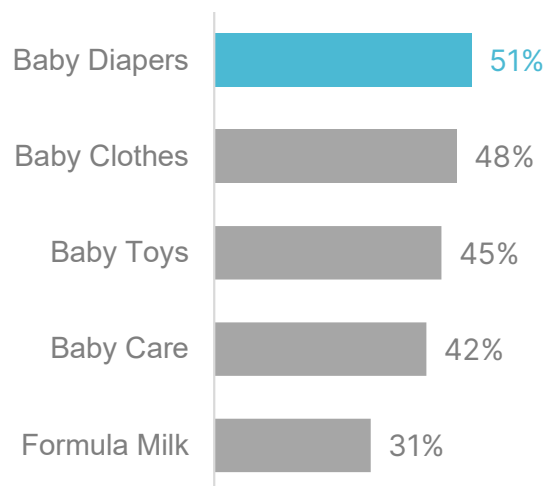
n=295 (e-commerce users 2022)

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

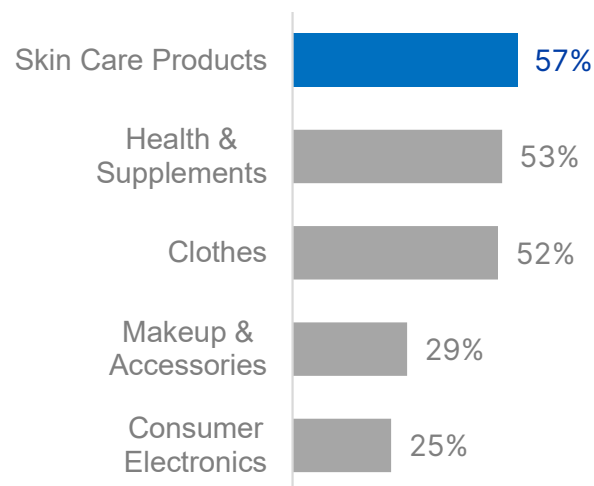
Q: What is the Online Shopping app that you use most often?

Baby diapers are the top items for the kids while **Skin care products** are relatively popular online along with **Groceries**.

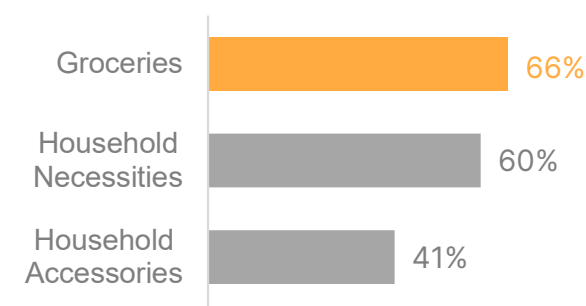
For Baby



For Personal Use



For the Entire Household



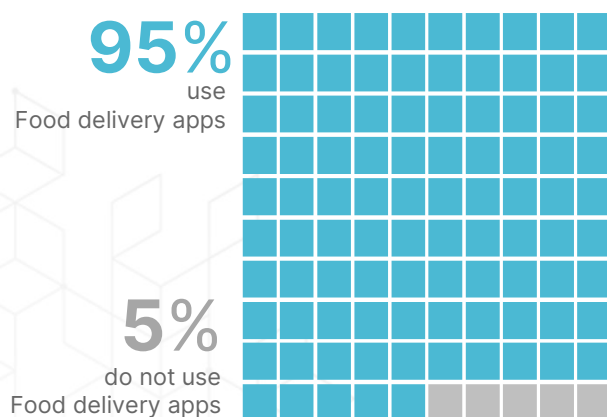
n=295 (e-commerce users 2022)

Q: What are the items/categories that you have bought online in the past 6 months?

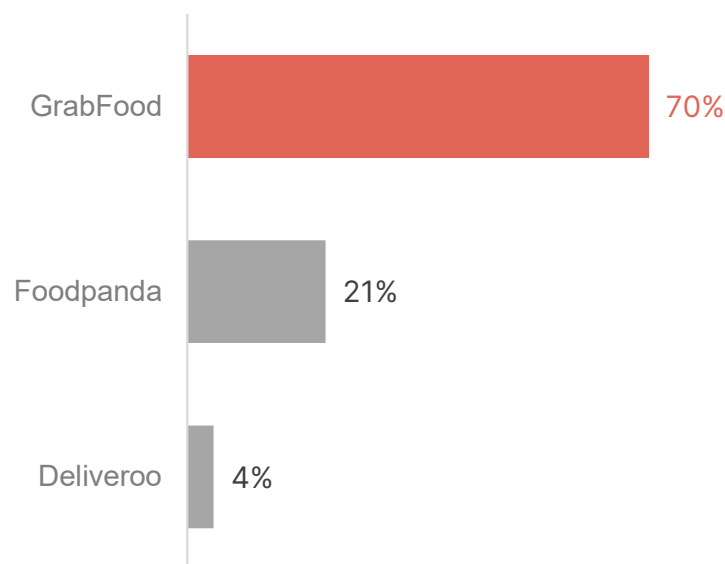
Mums who buy baby products online do so with a longer cycle than other mums – *with a possibility of bulk purchase?*

| | Baby Care Essentials | | | | | Baby Diapers | | | | |
|------------------------------|----------------------|-----|-----|-----|-----|--------------|-----|-----|-----|-----|
| | SG | TH | ID | MY | PH | SG | TH | ID | MY | PH |
| Base | 124 | 197 | 600 | 206 | 218 | 150 | 185 | 421 | 178 | 223 |
| More than once a week | 2% | 7% | 3% | - | 6% | - | 6% | 3% | 1% | 7% |
| Once a week | 5% | 9% | 3% | 1% | 6% | 3% | 7% | 9% | 4% | 8% |
| 2-3 times a month | 5% | 23% | 19% | 14% | 36% | 12% | 23% | 34% | 20% | 42% |
| Once a month | 22% | 39% | 56% | 36% | 32% | 29% | 42% | 42% | 44% | 34% |
| Once every 2-3 months | 43% | 17% | 16% | 30% | 17% | 48% | 11% | 8% | 16% | 5% |
| Once in 4-6 months | 21% | 6% | 3% | 15% | 4% | 8% | 4% | 2% | 9% | 2% |
| Less often once a year | 2% | - | 1% | 4% | - | - | 6% | 2% | 6% | 2% |

Mums who use delivery apps remain the same as compared to last year (95%).

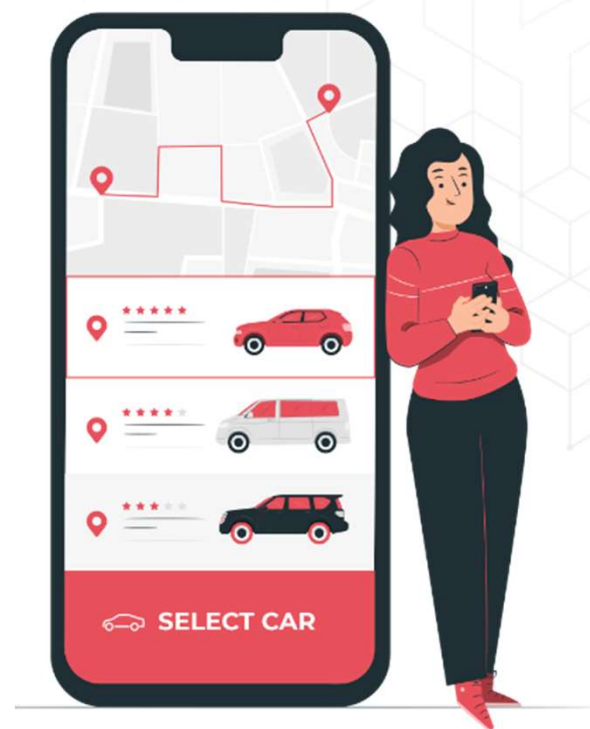
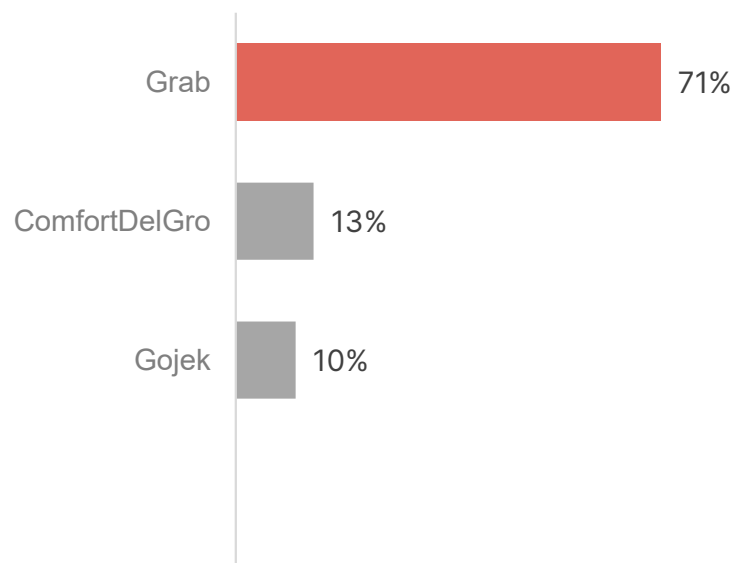
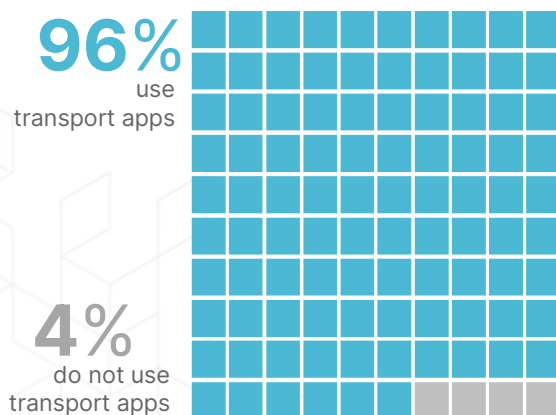


GrabFood is the most used food delivery app in Singapore. Foodpanda is an alternative that can be used.



n=311(all respondent 2021), n=776 (all respondent 2022)
Q: What is the Delivery app that you have downloaded?
Q: What is the Delivery app that you use most often?

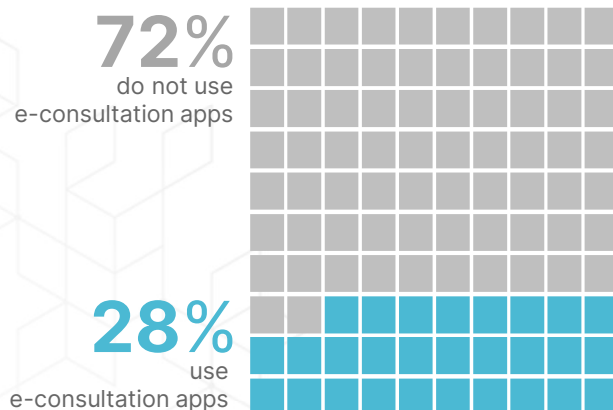
Grab is still the most preferred ride-hailing app among Singaporean mums.



n=311 (all respondent 2022)
Q: What is the transport app that you have downloaded?

Most mums still **do not use** any e-consultation apps in Singapore...

... for mums that do, **Doctor Anywhere** is the most popular e-consultation app.



69% | 61%
All used | Most used



Doctor
Anywhere SG

22% | 13%
All used | Most used



White Coat

19% | 10%
All used | Most used



Healthway
Medical

n=88 (e-consultation app users 2022)

Q: Do you use health consultation apps (e.g. Doctor Anywhere, HealthifyMe, MediBuddy, etc) ?

Q: Please select the e-consultation / Health App apps that you currently have downloaded?

Mums in a multi-screen homes

Mums on average **use 3.5 screens** and they **spend at least 3-4 hours daily on social media** or online TV.

While mums are always-on nowadays, brands looking to reach out to mums online must do so **between 9-11pm**.

The increasing appeal of short videos

Facebook and Instagram remain to be the go-to social media platform for mums and the appeal of **short video format is evidently on the rise**.

Brands will have additional opportunities to diversify content type, connect with mums deeply and in different ways.

Investigative mums

With more products being sold online than ever before, Singaporean mums research e-commerce products by **intensively reading articles** and **comparing prices** using different platforms.

As mums use multiple sources, it is important for brands to provide a **consistent experience** and **enough social proof** across different apps.

An app for every occasion

App adoption is relatively high for each of the categories in Singapore.

It is important for brands to **recognise the context and needs of mums** whenever they **use different apps for herself, her baby, and the entire household**.





THANK YOU

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