



YOUTUBE MUMS (UK)

JULY 2016

YouTube

Methodology



Google and Ipsos Connect Germany conducted a study to better understand how Mums use and engage with YouTube.

Respondents who purchased within the Beauty, Packaged Food/Beverage, Electronics or Fashion vertical within the past 3 months and were the sole/shared decision maker for the purchase were asked vertical specific questions.

- Total of n=5,000 respondents aged 18-54, UK residents
- Sample consists of 2 groups: YouTube Women n=2,500 and General Online Population n=2,500 for comparison
- Device agnostic and mobile first designed survey with a duration of 15 minutes
- Fieldwork between June 13, 2016 and June 30, 2016
- Quotas/weighting on age, gender, region, education, household size, internet usage and YouTube usage according to Google Connected Consumer Survey 2016.

Summary



- 01**  YouTube usage for Mums is still on the rise, providing convenient access to relevant content across (mobile) devices.
- 02**  Mums watch YouTube both at home and on the go, and are engaged with a diverse range of content.
- 03**  As well as being a source of entertainment, YouTube is a trustworthy source of parenting advice and inspiration, and a place for Mums to spend time with their kids.
- 04**  YouTube is influential throughout all stages of the path-to-purchase for Mums - from awareness through to after sales.

01 HOW DO MUMS USE YOUTUBE?

YouTube usage for Mums is still on the rise, providing convenient access to relevant content across (mobile) devices.

84%

OF ALL MUMS THAT ARE
ONLINE USE YOUTUBE.



51% OF YOUTUBE MUMS*
WATCH MORE YOUTUBE
THAN TWO YEARS AGO.

44% OF THEM
WATCH LESS TV.



* 'YouTube Mum': A mum aged 18-54 that has ever watched YouTube

Having children impacts device preference for watching YouTube

59%



WOMEN MAINLY
USE SMARTPHONES

57%

AND COMPUTERS

61%



MUMS (OF SIMILAR
DEMOGRAPHIC PROFILE)
USE SMARTPHONES

50%

AND TABLETS

Mums of Younger Children are even more reliant on smartphones



YOUTUBE MUMS* OF

YouTube usage	Babies	Pre-schoolers	School-Kids	Teens
 Daily At least weekly	43% 76%	42% 80%	40% 73%	33% 68%
By device	 75%	68%	61%	52%
	 50%	52%	52%	47%
	 41%	43%	51%	56%

UK; Unweighted base: YouTube Mums of Babies n=211; YouTube Mums of Preschool-Kids n=598; YouTube Mums of School-Kids n=725; YouTube Mums of Teens n=537;
 Q13: Frequency Video Platforms Usage (YouTube); Q15: Device Usage for YouTube
 Note: Ages of children: Babies: 0-12 months; Pre-schoolers: 13 months-5 years; School-Kids: 6-12 years; Teens: 13-17 years

* 'YouTube Mum': A mum that has ever watched YouTube

20%

OF YOUTUBE MUMS* WATCH YOUTUBE
VIA **SMART TV** (1.4X MORE THAN
THE AVERAGE YOUTUBE USER).



* YouTube Mum: A mum aged 18-54 that has ever watched YouTube

02 WHERE AND WHAT ARE MUMS WATCHING?

Mums watch YouTube at home and on-the-go, and are engaged with a diverse range of content.

YouTube Mums* watch YouTube...



 At home **94%**

 On the go **17%**

 While watching TV **62%**

 With others (net) **64%**

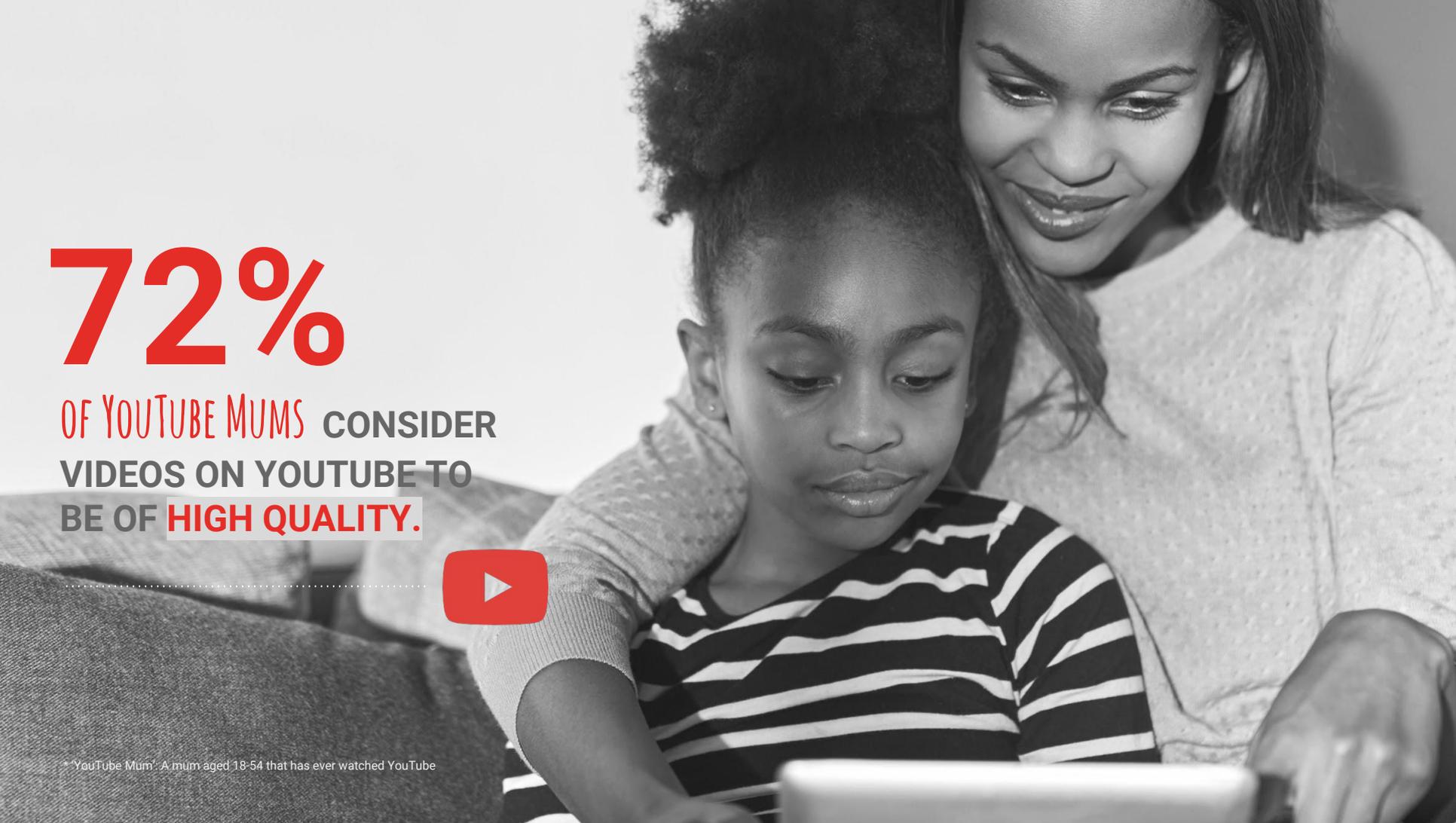
 With their child/children **49%**

 With their partner **19%**

 With their family **20%**

UK; Unweighted base: YouTube Mums n=1,507; Q26: Where do you typically watch YouTube videos?
Q27: Who do you typically watch YouTube videos with? Q28: Do you watch YouTube while watching TV?

* 'YouTube Mum': A mum aged 18-54 that has ever watched YouTube



72%

OF YOUTUBE MUMS CONSIDER
VIDEOS ON YOUTUBE TO
BE OF **HIGH QUALITY.**



**YouTube Mum: A mum aged 18-54 that has ever watched YouTube

YouTube Mums* are watching a wide range of content beyond just parenting



CONTENT YOUTUBE MUMS* WATCH ON YOUTUBE



UK; Unweighted base: YouTube Mums n=1,507;
Q17b: And how often do you watch the following content on YouTube? (Ever=at least less than once a month)

* 'YouTube Mum': A mum aged 18-54 that has ever watched YouTube

YOUTUBE MUMS* ARE

30%

MORE LIKELY TO WATCH
VIDEOS FROM RETAILERS OR BRANDS
AT LEAST WEEKLY, COMPARED
TO THE AVERAGE YOUTUBE USER.



* YouTube Mum: A mum aged 18-54 that has ever watched YouTube



03 WHY ARE MUMS TURNING TO YOUTUBE?

As well as being a source of entertainment, YouTube is a trustworthy source of parenting advice and inspiration, and a place for Mums to spend time with their kids.

58 % OF ALL MUMS
USE YOUTUBE
FOR THEIR OWN
ENTERTAINMENT, WHILE

41 % USE IT TO
ENTERTAIN THEIR KIDS.





56%

OF YOUTUBE MUMS*

**WATCH VIDEOS ON
YOUTUBE TO SPEND
TIME WITH THEIR KIDS.**



*YouTube Mum: A mum aged 18-54 that has ever watched YouTube



FOR **1 in 4**

YOUTUBE MUMS*, YOUTUBE IS
THE 1ST PLACE TO GO TO
FOR KIDS' VIDEOS.

* YouTube Mum: A mum aged 18-54 that has ever watched YouTube



YOUTUBE RANKS

#3

**AMONG ONLINE SOURCES FOR
ADVICE AND TIPS ON PARENTING**
(after Google and blogs).

UK; Unweighted base: YouTube Mums n=1,507. A 'YouTube Mum' is defined as a mum aged 18-54 that has ever watched YouTube
Q22: What are the sources you go first when seeking advice and tips about parenting? Please select up to 3 that are most relevant to you.



72%

OF YOUTUBE MUMS SAY THAT
YOUTUBE VIDEOS PROVIDE
INFORMATION FROM
PEOPLE LIKE THEM.



* YouTube Mum: A mum aged 18-54 that has ever watched YouTube



70%

OF YOUTUBE MUMS* WOULD
MISS YOUTUBE IF IT WAS
NO LONGER AVAILABLE.



* YouTube Mum: A mum aged 18-54 that has ever watched YouTube

04 HELPING MUMS DECIDE WHAT TO BUY

YouTube is influential throughout all stages of the path-to-purchase for Mums - from awareness through to after sales.



45%



OF YOUTUBE MUMS*

AGREE THAT VIDEOS ON
YOUTUBE HAVE A HUGE
INFLUENCE ON THEIR
PURCHASE DECISIONS.

*YouTube Mum: A mum aged 18-54 that has ever watched YouTube

YouTube videos cater for different needs during the purchase journey



FOR YOUTUBE MUMS*, YOUTUBE VIDEOS...

77%

“...help to learn about/explore products”



79%

“...allow to see products in action”



68%

“...answer questions in the moment”



54%

“...give trustworthy information”



UK; Unweighted base: YouTube Mums n=1,507; Q32: How much do you agree or disagree with each statement about watching YouTube videos? (Top 2); *=differs significantly at the 95% confidence level compared to respective comparison group

* 'YouTube Mum': A mum aged 18-54 that has ever watched YouTube

YouTube is influential at every stage of the purchase funnel, from inspiration to using the product.



44%

Helped me decide the **type of product** to buy

37%

Introduced me to a **brand or company I wasn't aware of**

48%

Helped me **narrow down** my choices

38%

Helped me **decide the specific brand** to buy

46%

Helped me **understand how to use** the product or service I bought

Awareness



..... Consideration



..... Purchase Decision



..... After Sales



UK; Unweighted base: YouTube Mums* n=180; Average YouTube User n=239

Q35: How specifically would you say YouTube influenced your [VERTICAL] purchases? (Verticals include Beauty, Packaged Food/Beverage, Electronics or Fashion)

Base: YouTube Mums* who say YouTube has influenced their [VERTICAL] purchases.

* 'YouTube Mum': A mum aged 18-54 that has ever watched YouTube

OF MUMS WHO SAY
YOUTUBE HELPED
DURING THEIR
PURCHASE JOURNEY,

66%

ACTUALLY MADE
A PURCHASE AFTER
WATCHING A VIDEO



APPENDIX

YouTube Mums more likely to use YouTube for tips and kids' entertainment while YouTube Dads more likely to use it to spend time with their kids.



USE YOUTUBE WITH CHILDREN



49%

YouTube Mums



30%

YouTube Dads

WEEKLY USAGE OF VIDEOS



Videos for kids

43%

36%



Parenting and baby/child care

23%

17%

REASONS FOR WATCHING KIDS' CONTENT

I like to spend time together with my kids



56%



64%

I check it before I allow my kid to watch



36%



26%

I like to watch it for my own entertainment



14%



24%

MOTIVATIONS TO USE YT

To entertain myself



58%



68%

It offers tips and inspiration



44%



37%

To entertain my child/children



41%



37%

UK; Unweighted base: YouTube Mums n=1,507; YouTube Fathers n=354; Q21: Motivations to use YT; Q17b: Frequency used content on YT; Q27: Peers for usage; Q18: Watching kids' content

* 'YouTube Mum': A mum that has ever watched YouTube