

SHEKNOWS®



Marketing to The “Likeable” Mom

The Like Cycle: How Family, Brands, and
Technology Influence Her Social Identity

SheKnows, LLC.
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This whitepaper examines how four groups of mothers – working, stay-at-home, Millennial, and Generation X – connect with and react to technology, specifically with regard to the social media content they create, share, and seek.

INTRODUCTION

Often identified as the social gender, women are known to talk, touch, and connect more than men. Over the last decade, advancements in technology, and especially the rise of social networks, have enabled women to scale their connections and to thrive in online communities. Women have learned to develop trust and virtual intimacy with their social circles based on shared interests, experiences, and values. They are sharing, speaking, and listening more than ever, and doing so more rapidly and at greater scale.

How are these new social behaviors impacting women's identities? SheKnows is dedicated to serving women's lifestyle passions online. As such, we are interested in identifying the strengths and challenges that a scaled social identity creates. As we embarked upon a study of women's online behaviors, we found that technology and social feedback play critical – and sometimes conflicted – roles for mothers. We chose to hone in on mothers' social identities and use of technology because too often, moms are characterized as a single consumer. Our report illustrates that there are actually several mom profiles when considering online social expression and use of technology. We were particularly interested in the differing perceptions of working mothers compared to those who stay at home, and of Millennial Moms compared to Generation X Moms. While no two mothers are the same, and these groups are clearly not mutually exclusive, segmentation allows us to better understand what motivates, inspires, and concerns these archetypes.

KEY FINDINGS

By employment status

- **Working Moms (WMs) dominate across most social networks based on number of followers, and upload a variety of photos and videos showcasing their busy lives.**
- **Moms consider technology to be a welcome parenting tool, but Stay-at-Home Moms (SAHMs) are the least anxious about the dangers it potentially brings.**

By generation

- **With tighter circles and fewer profiles to juggle, Generation X Moms (GXMs) are less likely to be overwhelmed by technology than Millennial Moms (MMs).**
- **Millennial Moms (MMs) are firmly entrenched in the “like-cycle,” more actively focused on cultivating their online identities, and more collaborative in defining themselves.**

METHODOLOGY

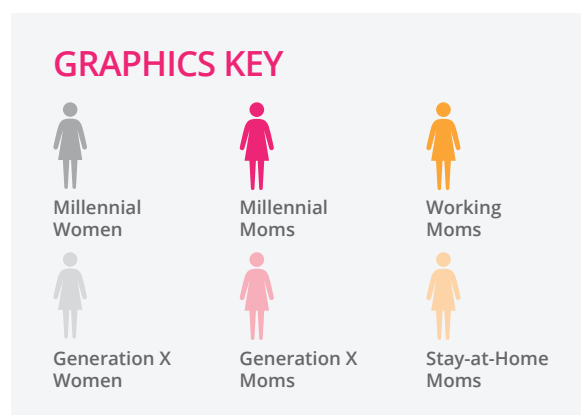
The study took the form of an online survey fielded between July 31 and August 15, 2013. The overall sample was comprised of 1,007 women between the ages of 18 and 65, living in the United States. All qualifying respondents indicated prior usage of an electronic device and having consumed digital content, as well as not currently working in a sensitive industry.

From the 1,007 women, 280 women born between 1966 and 1977 were classified as Generation X. Of those, a subset of 186 were identified as mothers of children under the age of 18 living at home.

Three hundred and thirty women born between 1978 and 1995 were classified as Millennials. Of those, a subset of 152 were identified as mothers of children under the age of 18 living at home.

Additionally, 222 women with at least one child and a full-time or part-time job were classified as Working Moms, while 147 women with at least one child who were not employed at the time of this survey were classified as Stay-at-Home Moms.

All bases, samples and sub-sets have been weighted to be representative of women in the general population.



Millennial Moms are more active on social networks, feeling more pressure to connect than their Generation X counterparts

Most Millennials don't remember what life was like in the pre-digital world. These digital natives are inherent early adopters of new technology, particularly with regard to advancements in mobile and emerging social media platforms.

But can perpetual connectivity make life feel overwhelming? Over half of Millennial women (56%) say yes, which is a 12% increase over women in the general population, and a 30% increase over women who are part Generation X. With the majority feeling overwhelmed by social connectivity, it appears that the digital natives are a bit restless.



Figure 1

Findings suggest that Generation X women perceive the advantages of digital connection more positively than their Millennial sisters. This makes sense, as older women recall childhoods when pay phones linked them to parents, paper maps were the best navigation tools available, and work, for their parents, occurred only outside of the home. Of course they still appreciate the advent of technology and particularly digital connectivity. They've got just as many devices in their homes as Millennials. Eighty-three percent of Generation X women believe technology helps them achieve a better work/life balance, as do 78% of women in the general population and 76% of Millennials.

Motherhood can arguably be one of the greatest challenges to work/life balance. Millennials begin to appreciate technology more when they become mothers, as multi-tasking becomes a necessity. Most Millennials had access to cell phones in college, and many in high school, so they are far less accustomed to life without their lifeline. As such, MMs exhibit a zealous attachment to smartphones, stronger than that of GXMs. While the vast majority of both MMs (80%) and GXMs (75%) who are smartphone owners admit to sleeping with their phones in their bedrooms, GXM's are less likely to actually use them there. Less than half (49%) will check personal email or social networks in bed, compared to 75% of MMs.

But just how important is the smartphone? While all moms would find it very difficult to give up their phones for six months, more MMs would rather give up sex, TV or dessert than their smartphones if forced to choose.

And what about differences in employment? It is no surprise that a quarter of WMs also are checking personal email or social networks on mobile while actually mobile – walking. However, the office is the most common place to catch up, suggesting that many are willing to preserve digital activities, whether work or personal, at work and away from home.

WMs need their lifeline more than SAHMs, with only 16% choosing to give it up over dessert, sex or TV compared to 22% of SAHMs. And perhaps less time at home makes them value their TV time – almost as few WMs chose to keep their TVs as their smartphones. Conversely, SAHMs may value the time their employed partners have at home, as they are less likely to give up their sex lives.

Dessert, sex, smartphone. or TV – which would they give up?

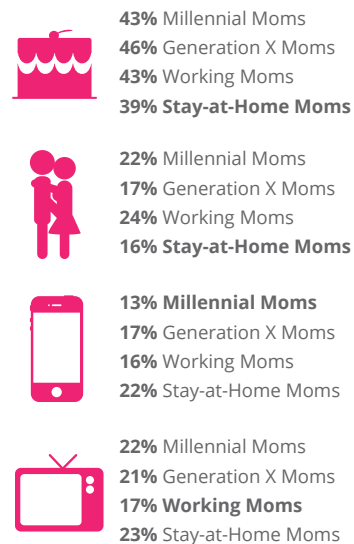


Figure 2

Millennial Moms maintain multiple social identities

Perpetual connectivity is naturally correlated with MMs' hyper-activity on social networks. Their openness to new platforms has resulted in far more social profiles to manage than GXMs. They are more actively participating on YouTube, Google+, Instagram, and Tumblr. While managing so many disparate online personas, they're also cultivating large followings across several networks. MMs have nearly four times more Instagram followers and five times more Tumblr followers than GXMs, underscoring MMs early adoption of newer networks.

When it comes to connections, WMs' networks are larger than SAHMs across almost all platforms. Predictably, WMs lead on LinkedIn; however they also dominate on Facebook, with 36% more friends, as well as more than twice the Twitter followers, four times the Instagram followers, and nearly fifteen times the Google+ contacts.

Amount of friends/followers on top social networks

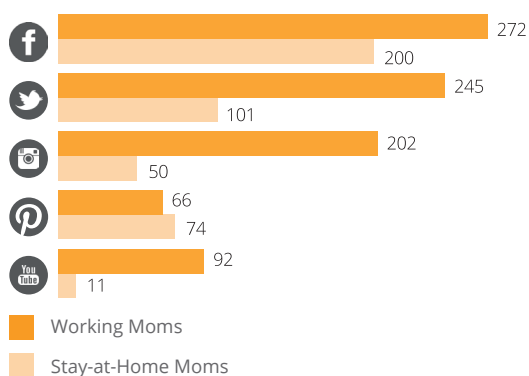
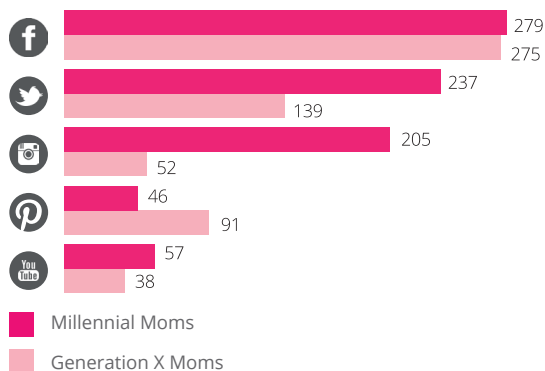


Figure 3

Generation X Moms keep their circles tight; Millennial Moms open them up to brands

Due to the influx of advertising on social networks, users can now decide whether they're willing to engage with brands alongside their families and friends. The number one reason for any mom to visit a brand's social media page is to find a deal, with SAHMs reporting the greatest majority at 71%. WMs are motivated to use social media to find brands while in the consideration phase and also post-purchase. Fifty-seven percent are researching products and services on social media. Twenty-seven percent will use social media to contact customer service and complain. Less than 20% of SAHMs use this channel to voice grievances.

Reasons to visit a brand's social media page

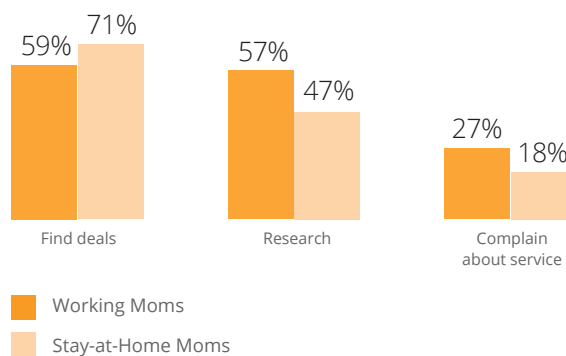


Figure 4

Having children does not greatly impact Generation X women's motivation to check out brand pages. For Millennials, however, there are two noticeable shifts that occur with the advent of motherhood. Fifty-one percent of MMs start using social media for research, a 16% increase over the generation overall. This could represent the maternal impulse to get both information and peer support simultaneously.

Both generations of moms are as likely to visit brands' social media pages, but for GXMs, that's where the engagement ends. They are not arbitrary brand supporters, averaging 13.7 brand followings, 2.5 less than the average for all women between 18 and 65. Just below one-third are influenced to follow brands by ads targeted to their interests, and 30% consider how the brand makes them feel. About a quarter say that a recommendation from a friend may be a good enough reason to follow a brand. In short, GXM's follow brands that appear to understand them. These influencers are similar to Generation X women overall.

In contrast, MMs follow a whopping 22.5 brands. While MMs were eagerly following brands before having children, the reasons to follow a brand remain the same with one conspicuous exception. While about 35% of Millennials think about how brands make them feel when deciding whether to follow them, 43% of MMs say it's a consideration, an increase of 23%. Personal identity becomes more closely tied to brand engagement.

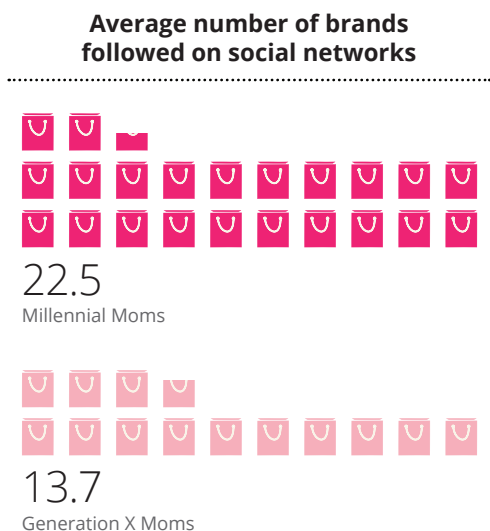


Figure 5

What's surprising about MMs' increased roster of brand support within social networks is that the segment is far more annoyed by ads that appear on their social feeds than members of Generation X. Yet they are receptive to relevant advertising and are more willing to "opt in" to participate or engage with brand campaigns.

MMs understand that brand advertising is a part of many media experiences. However they prefer to choose the brands with whom they engage. As the "opt in" generation, they know their rights and have little tolerance for irrelevant advertising. Despite the purported desire for relevance, re-targeting can go too far. There's a fine line between being served meaningful advertising and feeling like you are being watched. Across the generation of Millennials, 87% are "creeped out" that ads can track them online compared to 76% of Generation X women and 84% of women in general. Thirty-six percent of MMs concede that they are influenced by effective targeting on social media. Again, indicating their understanding of the dynamics of media. Most advertisers simply haven't yet mastered the un-creepy (organic) relevance trick, leaving their young consumers rather irritated.

Easy access to social media can boost traditional ad exposure. With multiple web-connected devices readily available at home, moms are pairing TV time (to varying degrees) with activity on "second screens," such as laptops, tablets, or smartphones. Many are likely to connect digitally to learn more about a program they are watching on TV. A MM is 17% more likely than a GXM to use a second screen to learn more about a show, though they are relatively even in their interest in commercials. These behaviors differ by employment status.

Working Moms are more likely to actively seek second screen information. Though they typically have the same number of devices in their homes, WM's are twice as likely as SAHMs to use second screens to learn more about shows, and nearly two and a half times as likely to do so to learn more about commercials.

Second screen activity

Working Moms are

2x

more likely to use a second screen to learn more about **TV shows** than Stay-at-Home Moms

Working Moms are

2.5x

more likely to use a second screen to learn more about **TV commercials** than Stay-at-Home Moms

Figure 6

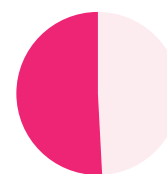
GXMs are not only more restrictive than MMs with the number of brands they allow to penetrate their social networks, they are also relatively conservative when it comes to allowing unknown people into their spheres. Fewer than 35% would ever accept or send friend/follower requests from a person that they haven't met in real life, making them only slightly more private than the generation overall.

In contrast to GXMs, motherhood triggers Millennial women to open their networks beyond what the offline world defines as a "friend." Sixty-two percent of Millennials only accept and send friend/follower requests to people they know in real life, not much less than Generation X. When motherhood hits, Generation X closes ranks by inching up to 67%, meaning only a third are opening up their networks. MMs open up with 51% accepting connections from individuals only known online.

They "friend" people not known in real life



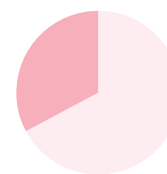
38%
Millennial Women



51%
Millennial Moms



36%
Generation X Women



33%
Generation X Moms

Figure 7

Working Moms can do it all... or so say their social media profiles

Since 75% of women use social media primarily to keep up with family and friends, motherhood predictably reinforces the desire to upload and share content, albeit with varying frequencies. Just over half of Millennials overall, and 61% of MMs, share content at least once a day. They believe in posting all meaningful life moments to social platforms, and the arrival of offspring spawns a volume of such experiences.

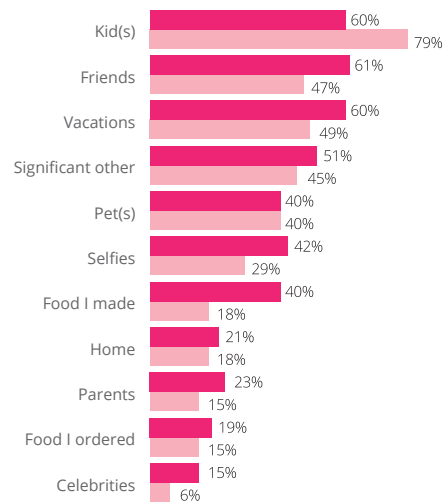
Frequency of creating and sharing content for GXMs mirrors the generation overall, but the content itself transitions. Seventy-nine percent of GXMs who share photos or videos give their children center-stage.

MMs may also be sharing more and more often, but not with the same content shift as GXMs. MMs are less likely to transform their social media profiles into exclusive celebrations of their children. Most photos and videos are still of their friends, just as they are for the generation overall. Vacation and kids are tied for second place. Other facets of their lives are strongly represented, including subjects such as significant others, parents and even celebrities. Food remains a relatively popular subject, with 40% of MMs posting photos of food they've made, and 19% sharing shots of meals they've ordered at restaurants. Perhaps the strongest indication of many MMs striving to keep their individual identities intact is their propensity to post "selfies" – 42% of MMs are featuring self-portraits on social media, just as many as Millennials overall.

Similarly, WMs curate a variety of content on social media. Sure, 69% feature their kids, but 55% share vacation highlights, and 49% showcase their friends. Perhaps in an effort to show that they really can do it all, 35% show off their skills in the kitchen by sharing meals that they've prepared. It seems evident that WMs are using social media to document and validate their family time. And finally, their content can incorporate video with 33% of WMs reporting that they have uploaded videos in the past three months, 138% more than SAHMs.

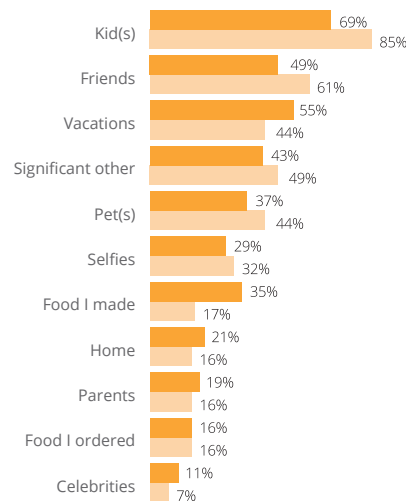
SAHMs are the most likely to share kid content, primarily through photos, but they haven't forgotten their friends. With 85% sharing photos of kids and 61% sharing photos of friends, they celebrate people over the things and places in their lives.

Content regularly shared on social media



Millennial Moms

Generation X Moms



Working Moms

Stay-at-Home Moms

Figure 8

The research shows MMs and WMs strive to maintain diversity of content, representing their unique personas, as both as individuals and as mothers.

Millennial Moms like to be liked... and to like others

After sharing on social media, WMs are most driven by feelings of validation when their followers like, comment or spread the content, followed by MMs, then GXMs. SAHMs care the least, even less than the general population of women.

Since smartphones play a more prominent role in MM lives, and perpetual feedback is a habit, it's only natural that they are checking for it more often. Ten percent admit to doing so every few minutes and 22% seek a reaction every hour.

While getting any feedback is just as important (or unimportant) as before motherhood, trends show that it can be an issue for WMs, with 26% saying it is important to receive; 16% of SAHMs say the same. GXMs place a bit more value on feedback than MMs. But what if the feedback is negative? Whether they are moms or not, about 75% of Generation X women are bothered by negative feedback, but less than one-third will concede that such feedback will impact what they share in the future. MMs are much more sensitive to negative feedback, with 85% admitting to being bothered by it. Of those, slightly more than a third would alter their future behavior. Millennials are comfortable with the feedback loop and feel less defensive about what they hear from peers. As the collaborative generation, they are inclined to integrate feedback into their lives more seamlessly than the more confrontational Generation Xers.

While much of social media "like-cycling" is positive, enabling moms to give and receive peer support at the push of a pad, some moms can also feel alienated by viewing their peers' social activity. Millennials are slightly more likely to feel depressed after reading their social media newsfeeds. They are also more likely to feel inadequate when reading updates. Motherhood seems to boost mood and self-esteem. While a quarter of MMs admit to feeling inadequate, that's a 19% decrease to the generation overall. GXMs are not only less likely to share these sentiments, but they feel better than all women when they engage online.

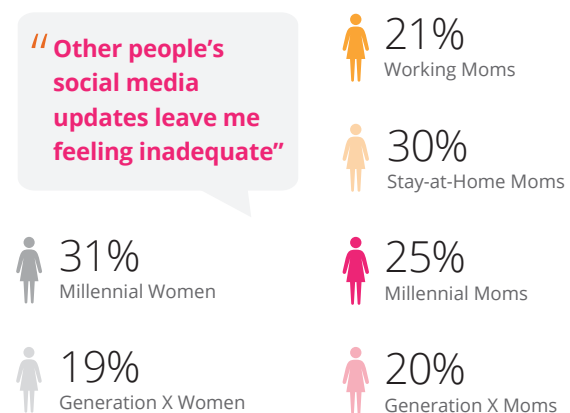


Figure 9

Emotions also run high regarding relationships and how they are reflected on social identities. Despite being younger, more MMs said they have exes than GXMs, 75% versus 61%. And of those MMs with at least one failed relationship, 28% will view their exes' profiles on social media at least once a month. MMs are also the quickest to change their social media relationships status and delete photos following a breakup, with 32% doing so the day of, compared to only 16% of GXMs.

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Mothers control their children's use of technology; while worries exist, its long-term impact is perceived as positive

The majority of moms believe using technology makes their children smarter; an average of 68% of MMs, WMs, and SAHMs agree. The largest tech advocate is actually GXMs, with 76% recognizing the lifelong benefits of being a digital native, perhaps because they experienced a steep learning curve first-hand. Moms are even more bullish when it comes to computer-based activities, including video games. Seventy-five percent of WMs, 77% of SAHMs, 80% of MMs, and 81% of GXMs believe these activities can help develop important skills that are key to their child's success in school and will play a role in future career advancement.

Mothers are also sensitive to new parenting concerns surrounding their children and technology, keeping a watchful eye on their exposure. For instance, 36% of MMs worry that technology can lower their child's self-esteem. That's a 14% increase over GXMs.

Yet MMs are not likely to discourage an early reliance on mobile. As the younger generation of moms, they predictably have younger children, with 28% caring for babies or toddlers compared to 16% of GXMs. Five percent of MMs provided a smartphone or tablet to their kids before the age of two, ensuring they will never know life without a touch pad or a community cloud.

Since they are used to being ever-connected themselves, MMs are also less likely to fear that their children will show signs of technology addiction. Seventy-two percent of GXMs state this as a concern, although they too struggle with discouraging usage. GXMs feel much more pressure to keep up with the Joneses when it comes to their kids' devices, while at the same time worrying that an attachment to devices will prevent their kids from playing outside. Having had parents that gave them simple warnings, such as don't sit too close to the TV, GXMs are more generally conflicted than MMs with regard to how much, how often, and how many for their children.

Interestingly, the mom that worries the least over whether technology will hinder children's ability to communicate face-to-face is the SAHM. Not only is she able to be more of a physical presence in her child's day-to-day life, but she may also have greater control over his or her environment. SAHMs also are not as concerned that technology will replace outdoor activities.

When thinking about the dangers of being online at an early age, WMs are twice as likely as SAHMs to worry that their children will fall victim to cyberbullying. It is possible WMs feel more strongly about this topic because they are unable to see their kids during the workday.

Concerns about technology's impact on kids

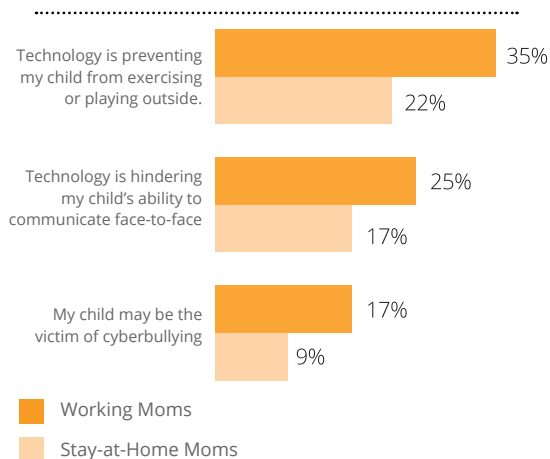


Figure 10

Over half of each group uses technology to entertain their kids. Three-quarters allow technology to occupy the kids so that they can focus on other tasks. As a result, about half of all moms ultimately feel guilty about their reliance on technology as a parenting crutch.

Despite these legitimate concerns, general sentiments toward technology and parenting are overwhelmingly positive for all moms. GXMs are even more enthusiastic than MMs toward technology as a parenting tool, likely because they have older children that they need to keep track of and/or help with schoolwork.

CONCLUSION

Women are redefining what it means to be a mom. To engage with this influential group, it is important to understand what shapes her identity and behaviors. As mothers look to social media, technology, and brands to help them navigate parenting, we found that:

- **Generation X Moms** are an active but controlled online audience. Motherhood propels GXMs to create different, but not more, social content as her online identity becomes closely linked to her children. They embrace technology to maintain work/life balance, and seek out brands online that they feel understand them.
- If the profiles of **Millennial Moms** are indications of how they'd like to be perceived in real life, then they are interested in being seen as individuals, users, consumers, rather than being solely identified as "moms." Their social circles are large, comprising of both "real-life" friends, virtual friends, and brands. Yet, this level of hyper-connectivity may lead to unwanted emotional responses. They have little tolerance for irrelevant advertising and show an understanding of the complex dynamics of media.
- **Working Moms** have large social networks and curate a variety of content to share. They've identified social media as a resource for researching brands and voicing complaints. While they rely on technology to manage their work and home lives, having less time to spend with their kids may cause WMs greater anxiety about potential dangers it brings.

- **Stay-at-Home Moms** are deal-driven, using social media to discover discounts and promos. They are able to detach; they need their smartphones, but are willing to set them aside more easily than other moms. They don't need feedback about the content they share in on social order to feel validated and they are less concerned about how technology can negatively impact their kids.

Advertisers have work to do. Brand associations have become a reflection of a mom's "best self." The link to identity is strong. In addition to presenting inspirational and aspirational qualities, brands' social pages should facilitate tasks busy moms are looking to accomplish – whether it is to find a deal, learn about a product, or reach customer service. Happy customers are more likely to become brand followers, and well-targeted, well-timed ads can bust through the "creep factor." Finally, consider messaging. Parental concerns differ among moms, with Working Moms more likely to respond to solutions that help alleviate their fears; emotional reactions to social media also differ with Millennial Moms, who are most willing to feel the impact of a "like."



For more information on this study, contact whitepaper@sheknows.com.

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END NOTES

Figure 1

Question: How much do you agree or disagree with the following statements: Technology can make my life feel overwhelming.

Base: Use Social Networks

Sample: Millennial = 330, Generation X = 280

Figure 2

Question: If you had to give up one of the following items for six months, which would it be?

Base: All Qualified Respondents (excluding those who answered “none of these”)

Sample: MM = 218, GXM = 151, WM = 233, SAHM = 134

Figure 3

Question: About how many friends/followers do you have on each of these social networks?

Base: Visits Social Media Site Regularly

Samples: MM = 142, GXM = 160, WM = 191, SAHM = 127

Figure 4

Question: For which of the following reasons, if any, are you likely to visit a brand's social media page?

Base: Use Social Networks

Samples: WM = 191, SAHM = 127

Figure 5

Question: Thinking about all your social networks, how many brands do you follow?

Base: Use Social Networks

Sample: MM = 142, GXM = 160, Gen Pop = 854

Figure 6

Question: How often have you ever used a “second screen” (e.g., laptop, tablet, smart phone) for each of the following?

Base: All Qualified Respondents

Sample: WM = 222, SAHM = 147

Figure 7

Question: Thinking about your social networks, which phrase(s) describe you? I only accept and send friend/follow requests from people I know in real life.

Base: Use Social Networks

Samples: Millennial = 306, Generation X = 245, MM = 142, GXM = 160

Figure 8

Question: Which of the following kinds of photos/videos do you regularly share in social media?

Base: Shares Photos and Videos

Samples: MM = 122, GXM = 135, WM = 156, SAHM = 103

Figure 9

Question: How much do you agree or disagree with the following statements? Other people's social media updates leave me feeling inadequate.

Base: Use Social Networks

Samples: Millennial = 306, MM = 142, Generation X = 245, GXM = 160, WM = 191, SAHM = 127

Figure 10

Question: How much do you worry about each of the following?

Base: Assigned Parenting

Samples: WM = 222, SAHM = 146