

# THE NEXT GENERATION OF FAMILIES

To celebrate the launch of Parents Insights™ globally we shine a light on some of the key trends shaping the family ecosystem in 2021.

EUROPEAN REPORT



THE  
**INSIGHTS**  
**FAMILY®**





# INTRODUCTION

The family dynamic has changed forever.

As kids, parents, and families continuously change the way they work, learn, and relax – it's more important than ever to understand their attitudes, behaviours, and consumption patterns **in real-time**.

Providing an unrivalled view into the family ecosystem – The Insights Family® now survey more than 362,100 kids and 176,800 parents **continuously** every year.

In a shifting landscape, up to date and reliable information is critical to drive decision making.

If kids, parents, or families are an important part of your business – then speak to us.

[theinsightsfamily.com/contact](https://theinsightsfamily.com/contact)

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# WHAT WE OFFER **THE INSIGHTS FAMILY SOLUTION**

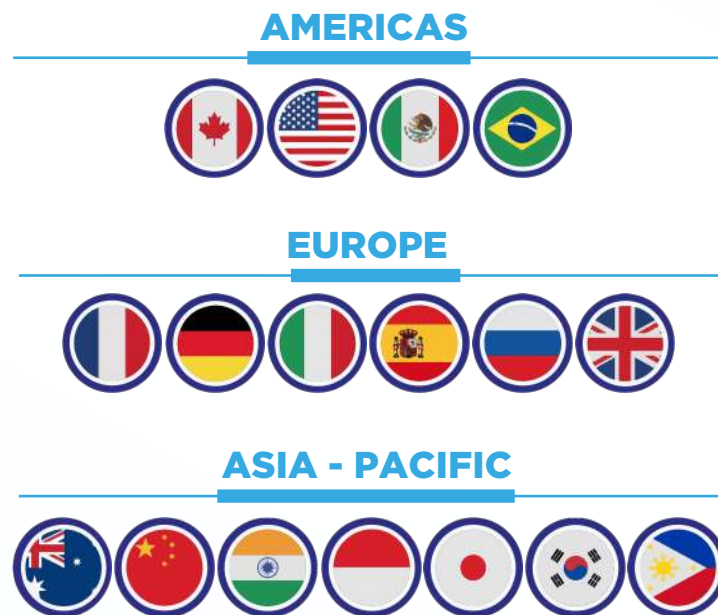


AN INTUITIVE  
GLOBAL SOLUTION...



362,100 kids surveyed and  
176,800 parents surveyed  
every year..

WITH A REGIONAL  
PERSPECTIVE...



In each country we operate,  
we survey 21,300 kids and  
10,400 parents each year.  
Or 1 every 117 seconds

AND UNRIVALLED  
LOCAL UNDERSTANDING.



Our sample - which is collected  
continuously - is age, gender and  
nationally representative.  
We also track income, ethnicity and  
household information.

# WHAT WE OFFER DATA AT YOUR FINGERTIPS



## The most comprehensive and dynamic solution in the world

Find out more and get freemium access



### REAL-TIME KIDS, PARENTS & FAMILY DATA

View, filter, interrogate, and analyse survey data to make decisions with clarity and confidence.



### PORTAL TOOLS

Analytical tools, such as Question Time™ and In Focus™ intuitively designed to help you make informed decisions.



### BUSINESS SOLUTIONS

A suite of tools, such as the Media Mix Compass™ and Persona Perspectives™ provide tailored recommendations for your business.



### API DATA

Track data from third party sources, including the top 100 channels across YouTube, TikTok, Twitch, Twitter, Instagram and Facebook.



### ON TRACK REPORTS

16 reports per year, per territory for Kids Insights™ and 4 per year, per territory for Parents Insights™ – automatically uploaded to your portal.



### CONTENT HUB

A curated content site, featuring insight blogs, videos plus the latest news from around the web.

# WHAT WE FOUND REPORT OVERVIEW

## WHAT YOU ARE SAYING

- ✓ 89% of industry professionals agree that the world is moving faster than ever before.
- ✓ Nine-in-ten businesses believe that they will be affected by the post-COVID economic downturn.
- ✓ In the kids and family industry, 69% agree that the amount of change is unparalleled.
- ✓ Only 6% of businesses believe they have a sufficient understanding of their own market.
- ✓ 94% agree that it is now essential to have regulated data on kids and families to drive business decisions.
- ✓ Nine-in-ten businesses surveyed believe that the media landscape has never been more fragmented

## WHAT WE ARE SEEING





- ✓ 77% of Italian parents say they encourage their kids to think about their effect on the environment
- ✓ 22% of parents in the UK have a food or drink subscription.
- ✓ 21% of Spanish parents state that playing video games is their favourite family pastime.
- ✓ 42% of parents in the UK think the future of education is online.
- ✓ 80% of German parents consider their child's opinion when making decisions
- ✓ 70% of 6-12s have "a little" or "a lot" of influence over parents purchasing decisions in the UK.

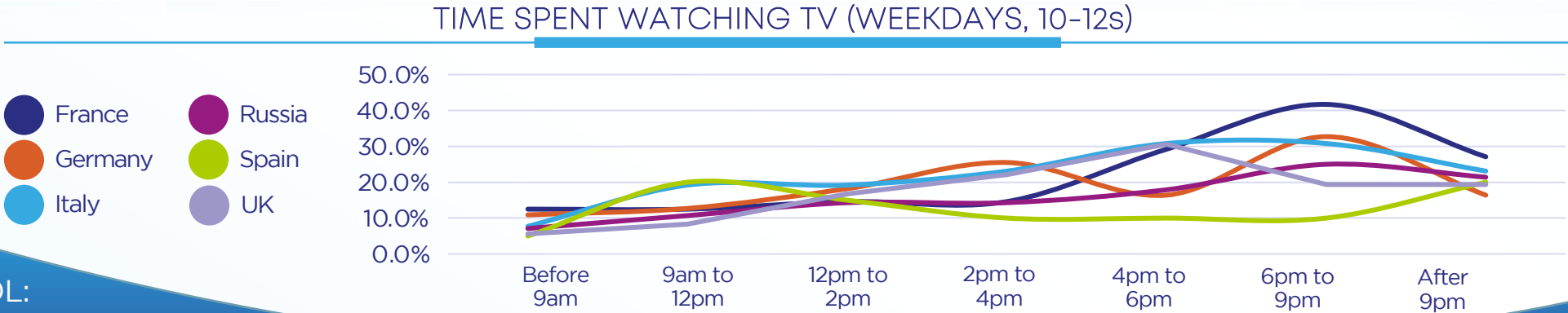


EUROPE, 2021, 10-12s

# CONTEXT – A DAY IN THE LIFE



	 FRANCE	 GERMANY	 ITALY	 RUSSIA	 SPAIN	 UK
Total Population	65.3M	83.8M	60.5M	145.9M	46.8M	67.9M
Kids Population	12.6M	11.7M	8.8M	20.7M	7.4M	12.5M
Average Salary (USD)	\$43,493	\$40,902	\$35,147	\$11,362	\$31,159	\$42,132
Work Week	29hrs 7mins	26hrs 2mins	33hrs 8mins	37hrs 58mins	32hrs 26mins	31hrs 1mins
Favourite Family Hobby (10-12s)	Theme Parks/Play Centres (33.3%)	Cooking/Baking (36.4%)	Travelling/Going on holiday (50%)	Cooking/Baking (39.3%)	Travelling/Going on holiday (45%)	Cooking/Baking (30.6%)
Favourite Family Activity (10-12s)	Watch TV (93.7%)	Watch TV (90.9%)	Watch TV (96.2%)	Watch YouTube (92.9%)	Watch TV (95%)	Play Video Games (91.7%)



# ALTERNATIVE EDUCATION THE FUTURE OF EDUCATION



THE PANDEMIC HAS THE POTENTIAL TO FUNDAMENTALLY CHANGE THE WAY CHILDREN LEARN.

With disruption to the traditional schooling system, teachers and parents turned to **new digital resources** available to supplement kids' education – such as learning new coding skills in apps or getting educational content via YouTube (done by 8.2 million kids across Europe).

As a result, parents and kids attitudes have shifted and they are now strongly considering alternative education options – **with around 4 in 10 UK parents now preferring to homeschool their child.**



**42%**

of UK parents think the future of education is online

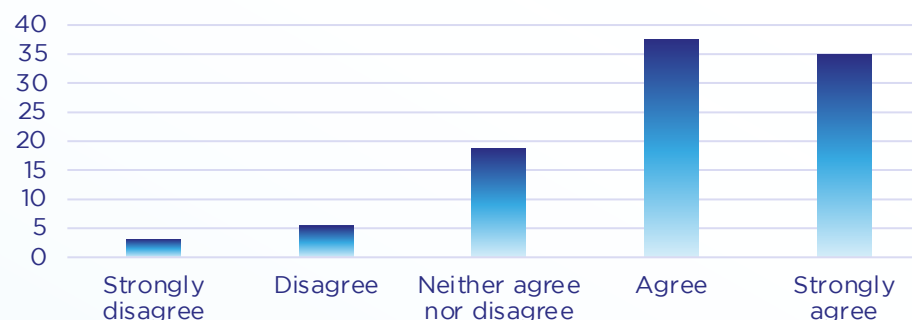


**9%**

of 6-9s in France have learned how to code in an app



I THINK IT IS IMPORTANT THAT LEARNING IF FUN (SPAIN)



## WHAT DOES THIS MEAN?

74% of French parents believe learning should be fun.

Therefore content, gaming and toy brands have the potential to offer experiences to both kids and parents that are fun but educational. Fortnite and Roblox have already been incorporated into an educational setting, and in the midst of the pandemic, Microsoft made areas of the Minecraft Education Edition free-to-play.



FAMILIES SHOPPING CHOICES

# KIDS INFLUENCE OVER HOUSEHOLD DECISIONS



## EVERY BRAND NOW A FAMILY BRAND

Across 21 household expenditure categories, the number of kids who influence their parents 'a lot' has increased across 18 of them.

It might be expected that kids would have influence over kid-centric purchases, such as toys or TV subscriptions, which contain their favourite shows.

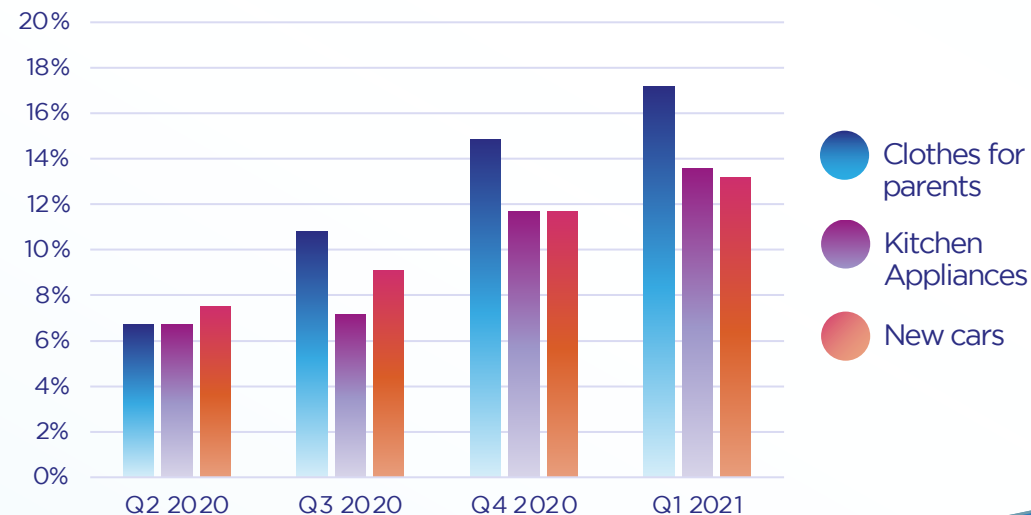
However, what has emerged from our Parents Insights™ data, is kids' influence over their parents' consumption habits that don't necessarily concern them.



**80%**

of parents say they consider their child's opinion when making decisions

## 10-12S INFLUENCE OVER HOUSEHOLD PURCHASES



## WHAT DOES THIS MEAN?

With families spending more time together during Coronavirus, a child's say in household purchasing decisions is greater than ever.

Brands, such as IKEA and BMW have already noticed the younger generation's influence and have adjusted their strategy to appeal to kids and parents alike. BMW recently announced a move into esports partnerships, in a direct attempt to appeal to a younger generation.

# THE NEW FAMILY PASTIME

## THE RISE OF FAMILY GAMING



IS GAMING SET TO DISPLACE TV AS THE GO-TO FAMILY ACTIVITY?

As the next generation of Gen Z and Millennial parents grow up as gamers themselves, our data shows they are now **passing down this hobby to their kids too.**

Video games are no longer a closed experience; they are open worlds with activities such as shopping and entertainment all built in, **satisfying the trend for co-creation and interactivity.**

Future generations are not only playing video games, but watching them too - with esports viewership outpacing traditional sports over the last year.



**71%**

of all UK kids play video games

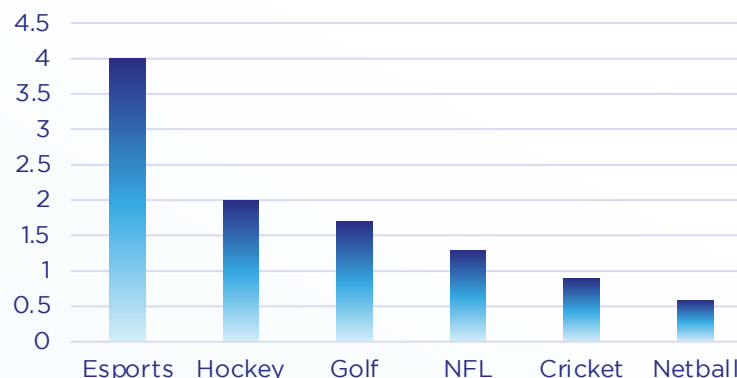


**21%**

of Spain parents state that playing video games is their favourite family pastime



### ESPORTS VIEWERSHIP COMPARED TO TRADITIONAL SPORTS (TEENS)



Esports viewership for France teens is considerably higher than many traditional sports.

### WHAT DOES THIS MEAN?

The League of Legends World Championship in 2019 was a record-breaking esports event, boasting over 100 million viewers. In comparison, the NFL Super Bowl - a much more established event - only attracted a slightly bigger audience of 100.7 million viewers.

The rise of esports could see parents of the future hand down team allegiances to their kids in a similar way to traditional sports. We also expect to see a new wave of kid-influencers from the world of esports.

# HEALTHY FAMILIES THE YEAR OF WELLBEING



THE NEED TO STAY FIT, WELL AND MENTALLY HEALTHY HAS NEVER BEEN SO IMPORTANT

The prolonged situation of remote learning and social distancing remains a challenge for parents to keep kids motivated and active.

We expect wellbeing, selfcare and improving mental health to become a daily focus for kids and families as we navigate back to some sort of normality. Brands that can help enable this are likely to resonate with both parents and kids alike.



**62%**

Consideration over the health benefits of food and drink has increased year-on-year amongst 6-9s in France

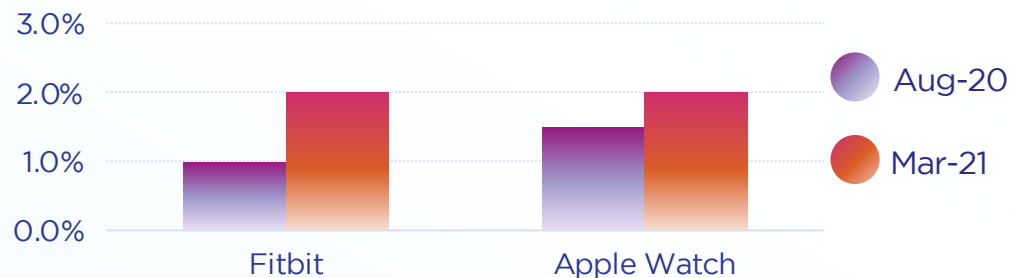


**24%**

Concern over health and wellbeing has increased year-on-year amongst 3-12s in Germany.



FITBIT AND APPLE WATCH OWNERSHIP, 6-12s UK



## WHAT DOES THIS MEAN?

We anticipate that there will be an increase in content creation focused around bringing households together, as brands look to reward happy and healthy families.

Tech brands also have a role to play, with the rise of wearable technology ownership. Our data shows parents who exercise with their kids are more likely to allow kids to use wearable devices, so a family-oriented approach in wearable technology could be taken.

# SUSTAINABILITY BECOMING MAINSTREAM AN EVERGREEN GENERATION



THE SUSTAINABLE CONSUMER IS NO LONGER A NICHE AUDIENCE, IT IS BECOMING THE MAINSTREAM.

Across the world, children's voices throughout society are becoming stronger and more relevant.

The environment continues to be a key issue amongst kids, parents and families. With kids having such influence on their parents and brands, it's more important than ever to have a clear environmental strategy.



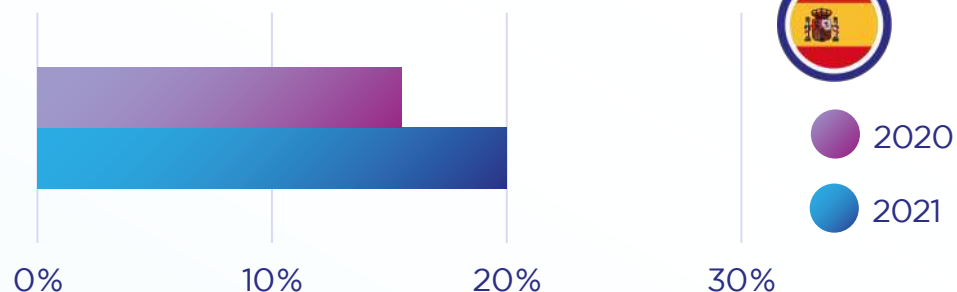
**34%**

of German teens report that environmental issues and climate change as their most pressing concern



**64%**

of parents in Spain say they encourage their kids to think about their effect on the environment



## WHAT DOES THIS MEAN?

It's not just talk – purchase habits are starting to change too. For example, parents who name LEGO as their favourite family brand are +22% more likely to spend more on something because it is environmentally friendly sustainable.

Therefore, brands need to adapt their advertising, marketing, and product strategies, by acting and communicating their values.

# CONCLUSION

After speaking to industry professionals in our Kids & Family Industry Report 2021 we found that 89% agree the world is moving faster than ever before and 7 in 10 think the amount of change is unparalleled.

That's why, earlier this year we launched Parents Insights™ globally - speaking to 3,400 different parents across 17 countries, **every single week**.

In a shifting landscape, having up to date and reliable information is critical to drive decision making.

If kids, parents, or families are an important part of your advertising, content, licensing, marketing, product or sales strategies – then please get in touch.

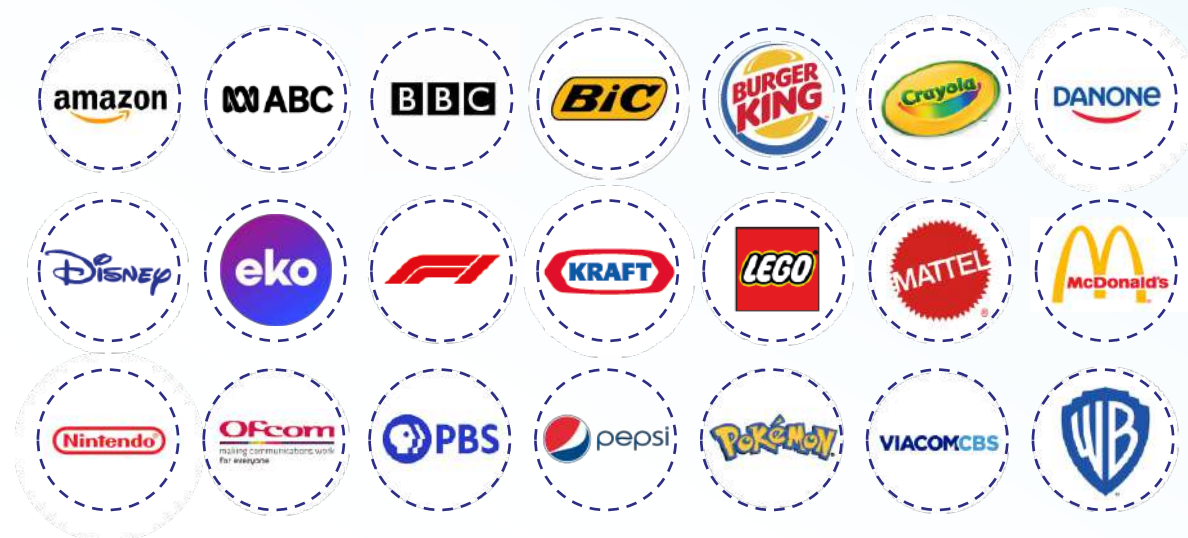
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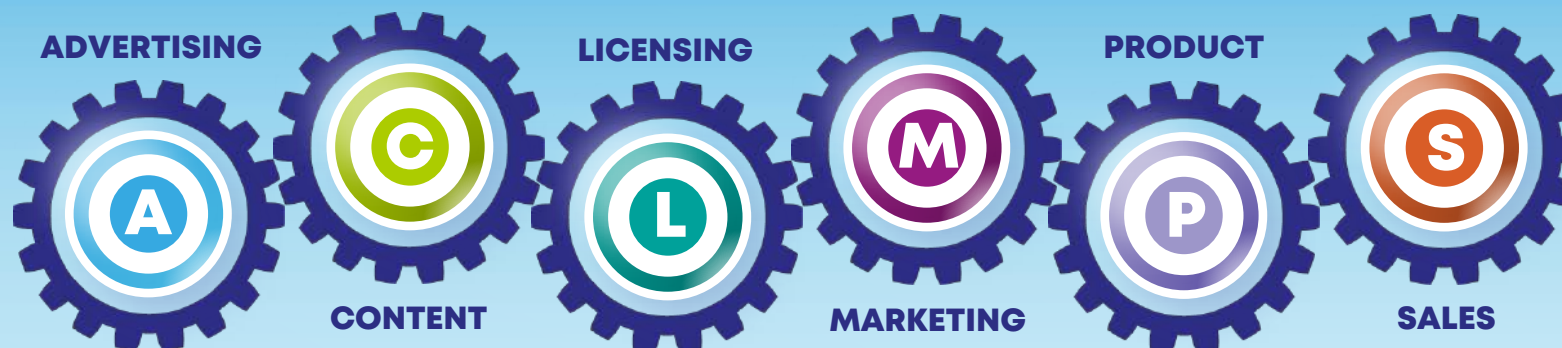
# THIS IS JUST THE START **EXPLORE MORE**



The Insights Family® is used and trusted by global leading brands and agencies.



## DELIVERING ROI ACROSS OUR CLIENTS ORGANISATIONS:



# WE HOPE TO BE A PART OF YOUR FUTURE



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