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KIDSINDUSTRIES.COM

The Global Family

2023 Conference Summary

HELLO!

As the final celebration marking our 20th anniversary, we, Kids Industries (KI), hosted a conference to launch fresh and exciting insights from our extensive The Global Family Study – an insight report carried out across 10 countries, spanning six continents.

If you'd like to know more about how The Global Family Study can help you, or what we could work on together, please get in touch with:

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OUR STORIES

Our opening keynote set the scene for the day, focussing on the story of the global family. **What are the similarities and differences within global families? What are their lifestyles, habits and challenges they face?** A timestamp of family life today right around the world. We shared their attitudes, media habits, mental wellbeing and hopes for the future.

Story 1: What exactly is fandom, why is it important to us and how do we create devoted fans? We shared emerging trends that shape what we think about fandom, as well as the KI Fandom tool; an evolving model that helps to understand how fandom manifests itself and can be encouraged in an ever changing world.

Story 2: Where is the Love? A key motivation for working in the kids and family space is the love that the brands KI work with engender in children. But how do you build this love story? In this session we shared how changes to the global family impact how we apply our KI brand love principles.

Story 3: What will the future look like? We shared parents' and children's evolving hopes, ambitions and priorities for the future. We also considered the challenges they are concerned about facing – and their enduring optimism for what is to come.

UNCOVERING THE GLOBAL FAMILY INSIGHTS

The Global Family is the result of KI listening to **over 5000 families all over the world** to figure out exactly what it means to be a family today. We've uncovered a goldmine of insights that let us know what families and children's lives are like, what they're doing in their leisure time, how parents feel about the media they consume, and what they want and expect from their environment, their media content, and even more broadly – from their future.

THE SCOPE OF THE GLOBAL FAMILY STUDY

PARENT AGE BREAKDOWN

Gen Z (18-25yo)	6%
Younger Gen Y (26-34yo)	26%
Older Gen Y (35-39yo)	28%
Gen X (40+yo)	40%

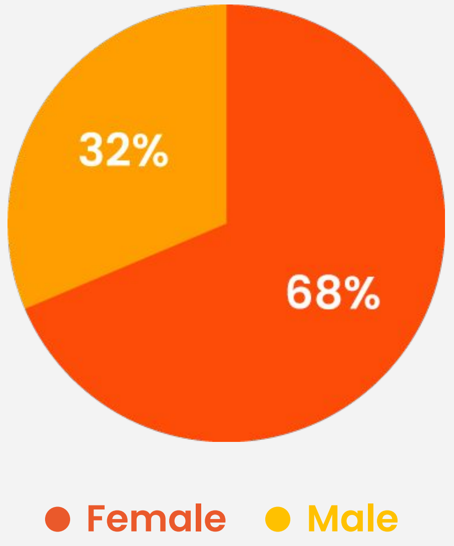
Oldest parents in South Korea (60% aged 40+)

Youngest in Saudi (44% Gen Z or young Gen Y)

PARENT GENDER BREAKDOWN

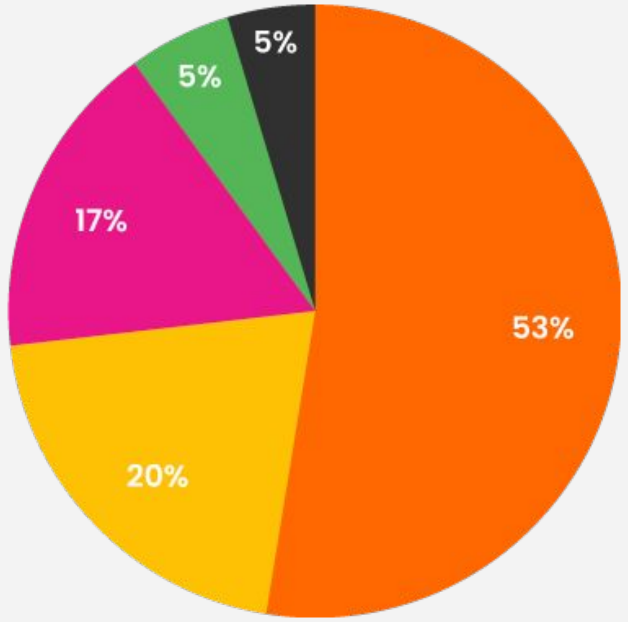
More mums than dads took the survey globally .

Dad representation 27% - 35% across all countries.



LIVING ENVIRONMENTS

- **Capital or Large city** (population 500,000 or more)
- **Regional City Centre** (population 100,000 - 499,99)
- **Town Commuting Distance From City Centre** (population 10,000 - 99,999)
- **Village** (population 5,000 - 9,999)
- **Remote Community** (less than 5,000)



CHILDREN'S AGE & GENDER PROFILES

Male	50.1%
Female	49.6%
Non-binary	0.3%

4-6	20%
7-10	40%
11-13	40%

The Global Family

N = 5,032 respondents

Locations: UK, USA, Germany, France, Brazil, India, South Korea, Nigeria, Saudi Arabia, Mexico (10% of sample in each)

Keynote

Jelena Stosic – Strategy Director

The Global
Family

Families are as different as they are alike.

We chose to study families, with all their different members, because fundamentally: the decision-making of every single member concerns them on their own and the entire family as a unit. Families around the world are different, and these differences have an undeniable impact on lifestyle, choices and engagement with brands.

GLOBAL FAMILY

Definition 1:

A group of one or more parents and their children living together as a unit.

Definition 2:

All the descendants of a common ancestor.

EXAMPLE DATA

Household composition, who lives with extended family

	INDIA	NIGERIA	BRAZIL	USA	UK	FRANCE	GERMANY	MEXICO	SAUDI ARABIA	SOUTH KOREA
Living with parents' siblings	11%	8%	4%	3%	2%	3%	1%	7%	9%	2%
Living with in-laws	47%	8%	7%	6%	6%	5%	6%	17%	17%	9%
Living with extended family	9%	15%	10%	4%	2%	1%	1%	2%	4%	0.4%

Amidst changes in parenting styles, fundamentally parents still lean towards protectionist values and kids fitting in.

When exploring parenting styles, we found that even with the rise of gentle parenting and overall increased access to information about it, at this moment in time parents are fundamentally leaning towards protectionist values, prioritising fitting in and being an authority figure.

We asked parents to agree or disagree with statements like 'children's **results** should be rewarded first and foremost' vs 'children's **effort** should be prioritised first and foremost'; and 'it's a parent's role to be an **authority figure** in their child's life' vs 'it's a parent's role to be their child's **best friend**'. The majority of parents in all countries that we surveyed agreed with the former statements.

When asked whether children should be given room to be **wholeheartedly themselves** or should be taught to **fit into society**, again, the majority of parents in all countries we surveyed agreed that children should fit in – apart from in Nigeria. And aside from in the UK and India, most parents believe that **gifted children** should be prioritised over participating in activities **regardless of ability.**

The challenges of parenting bring surprising results: even though safety and raising good children are essential, media has a lot to answer for too.

The challenges of parenting may surprise you! While the top end of it (morals and values) are evergreen, it's notable that media has a big job to do and a big responsibility. It's perceived as a top 5 challenge of parenting, and is a bigger challenge than physical safety in Nigeria and Korea.

In these countries, their children being exposed to **negative media** was respectively **10% and 19%** more concerning than physical safety.

Additionally, **32% of all parents** in our survey ranked negative media their child is exposed to as a high level concern, coming joint second with bullying and their children's education.

No surprises, kids are increasingly online, but one of parents' top-level concerns is the quality of media that they are consuming.

Globally, kids are spending more of their time than ever before online – watching online videos or on social media.

Not surprisingly, we found that the most popular online social or video platform is **YouTube (used by 63% of global children), with TikTok coming second at 34%** – concerning because children under 13 aren't allowed on TikTok. Given that it was their parents estimating this, we can assume that the actual number is higher!

There's also a pressure for media to perform for parents as well as kids, as our survey showed that co-viewing and linear TV are increasingly important for parents to a) spend quality time with their children and b) ensure that their children are consuming quality content.

Overall, kids' happiness is at a good level over the world, which is a relief!

Thankfully, we found that kids are overall pretty happy with their lives! From the schools they go to, to where they live and how they spend their time, **kids are over 70% satisfied with most areas of their lives.**

However, happiness declines with age. From 4 to 13, we saw a trend of children's overall happiness declining as they got older (unfortunately not something that stops!) with the sharpest decline for satisfaction in their **appearance**, which **drops at a rate of 13%** as they get older.

Though social media is one of the activities that we found that children most enjoy doing in their spare time, we can't ignore the role that it plays in creating negative self-image and unrealistic beauty standards. The resolution to this is more complex to simply taking social media away, but it's an important point of tension for the future of kids media.

1

Where is the Love?

Raj Pathmanathan – Creative Director
Matthew Macaulay – Senior Strategist

OUR BRAND LOVE PRINCIPLES...

How do changes to The Global Family impact how we apply these principles?

TAILOR Start with your audience

Brands should be tailoring their output to their audience, but also children's different developmental stages and different cultural needs.

Every brand should be tailoring their product and marketing strategy to their audience as a given – there's no one-size-fits all approach. When marketing to kids, however, it's doubly important to understand developmental differences at different ages, and how this changes around the world, to ensure that brands are addressing those unique needs, and effectively build brand love within that.

So, there's an opportunity to **stretch your brand** and build a layered strategy that reaches a broader audience by **embracing developmental differences**. Brands should also be aware that as **technology changes childhood**, they need to adapt and find other ways and opportunities to tailor to their needs.

INFLUENCE Understand decision making

Parents' influence on children is decreasing at an earlier age due to the earlier intervention of digital influencers and worlds in their children's lives.

It has always been that parents' influence on their children declines with age. With the rise of access to digital spheres of influence at a younger age, influencers and internet personalities are having an **increasing influence on children younger than previously**, so kids are having increased control at an earlier age over family decision making processes and purchase decisions across categories.

Global family has found that **influencers are beginning to rival friends and family as the trusted sources of information.** And when it come to the Toys recommendation, Influencer's have overtaken friends and family

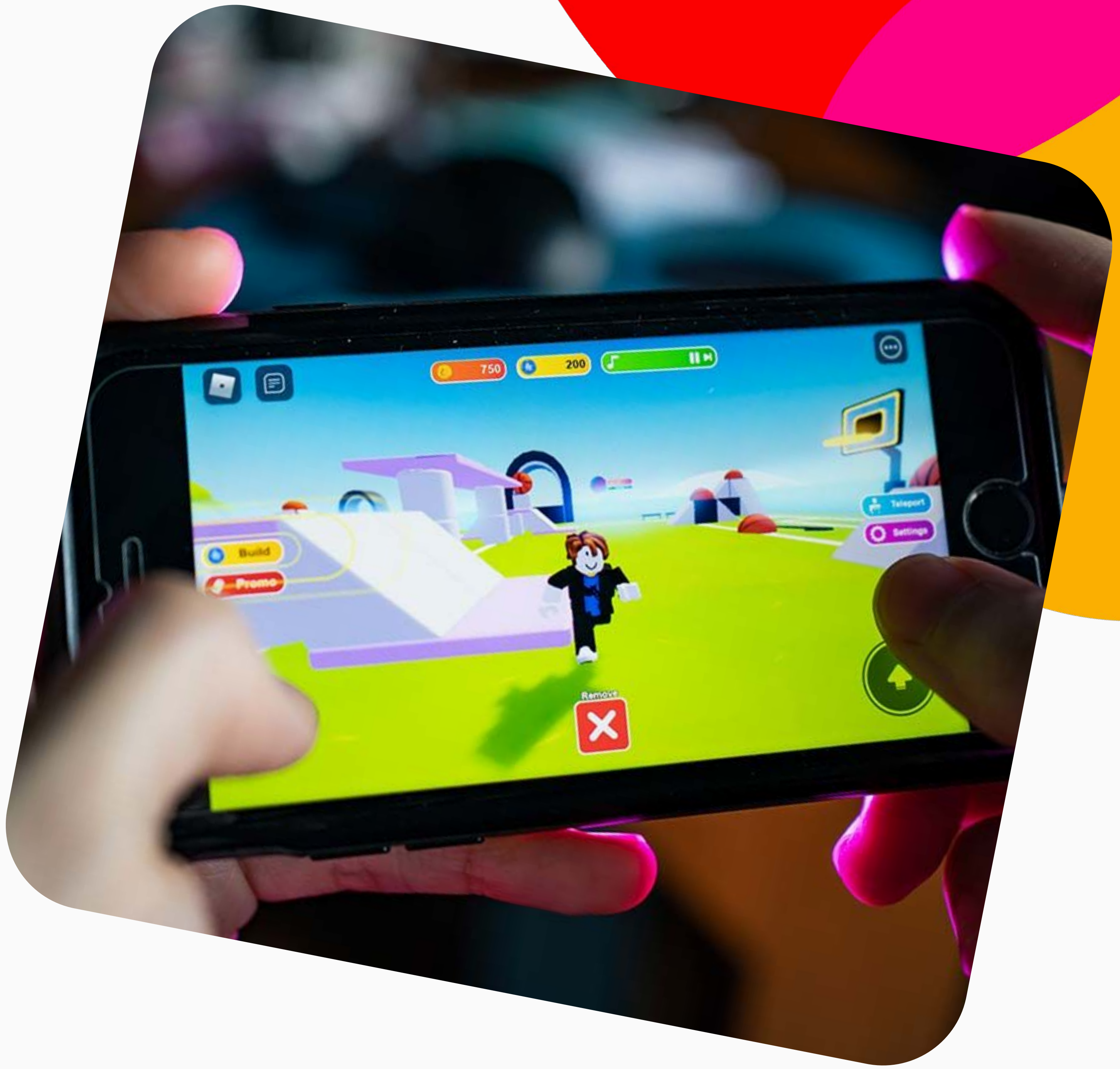
This is something that brands can **leverage to their advantage**, particularly by tapping into these expanded spheres of influence with influencers who are increasingly driving purchase decisions.

SURFACE Get your brand noticed

Brands benefit from the halo effect of platform love, particularly on Roblox. Braveness in pivoting to these new platforms reaps rewards for brand loyalty and awareness further down the line.

While YouTube still reigns in how kids discover new brands, gaming is increasingly important in this, **especially Roblox**. Adopting new and evolving platforms is beneficial later down the line: Roblox is currently where YouTube was 10 years ago. It's not all digital though – kids spent a significant portion of their time outside, and brands can harness OOH experiences to get noticed in the physical world as well as the digital one.

In summary: leverage platform love to get noticed digitally, and get kids and families together in the real world to cut through physically.



ENGAGE Create an experience

Brand loyalty is still best built through storytelling – whatever the race to the bottom with sludge content might have you believe.

In a digital landscape that prioritises quick likes, meaningful brand engagement is still about making memories and thoughtful storytelling. Memory only forms after 2.5 seconds of attention. Good storytelling can help build those memories; kids and parents are spending more time consuming content together, so the more effective stories are curated with these **shared experiences** in mind.

Especially as children are also looking for digital storytelling experiences that they can share with their friends, there are so many **more opportunities** for brands to tell stories in **new and exciting ways!**

PROTECT Protect your audience and brand

Safeguarding is a two-way street: for children but also for brands.

Working in kid's media, we work with a vulnerable audience that needs protecting. This has implications for the platforms on which we communicate with kids, especially as **19% of parents worldwide** dislike their children using social media. It's about brands **taking responsibility** in this new digital age when it comes to their vulnerable audience.

This also ties into protecting your brand: in the race to the bottom, with online platforms prioritising short-form content that gives a quick hit of dopamine, brands can take part in this sensory overload to generate views. But this isn't good, thoughtful storytelling, and won't keep people engaging in meaningful ways with brands over time. Essentially, in the race to the bottom, there is **no love story** to be found.

Marketing

BRANDS MENTIONED...

- Royal Caribbean International Cruises
- Ziggazoo
- PRIME Drink - Logan Paul & KSI
- Roblox : Alo Yoga, Shimmerville, Walmart Land, Nikeland, RBC x The Pet Seaboard City, Nickverse, Katmandu
- Anzu - Measurable performance marketing in 3D space
- Gruffalo in the forest
- Bluey
- Katmandu punta cana theme park
- Greenpeace sludge content

2

Fandom

Josh Brocklehurst – Senior Researcher

The Global Family

Let's look at how fandom has evolved and how brands can harness the mutating power of fans and fandom.

Fandom is an important element in the life of the global family.

65% of children globally have a strong fandom association!

For families themselves, fandom provides excitement and a positive outlet for creativity, and is experienced and expressed in a variety of ways (**3.5 ways on average!**).

For brands, fans are committed consumers with greater advocacy and spending power. Just look at the impact BTS and their fandoms have, bringing in almost **$5bn for the South Korean economy**.

So for everyone then, fandoms are a win-win!

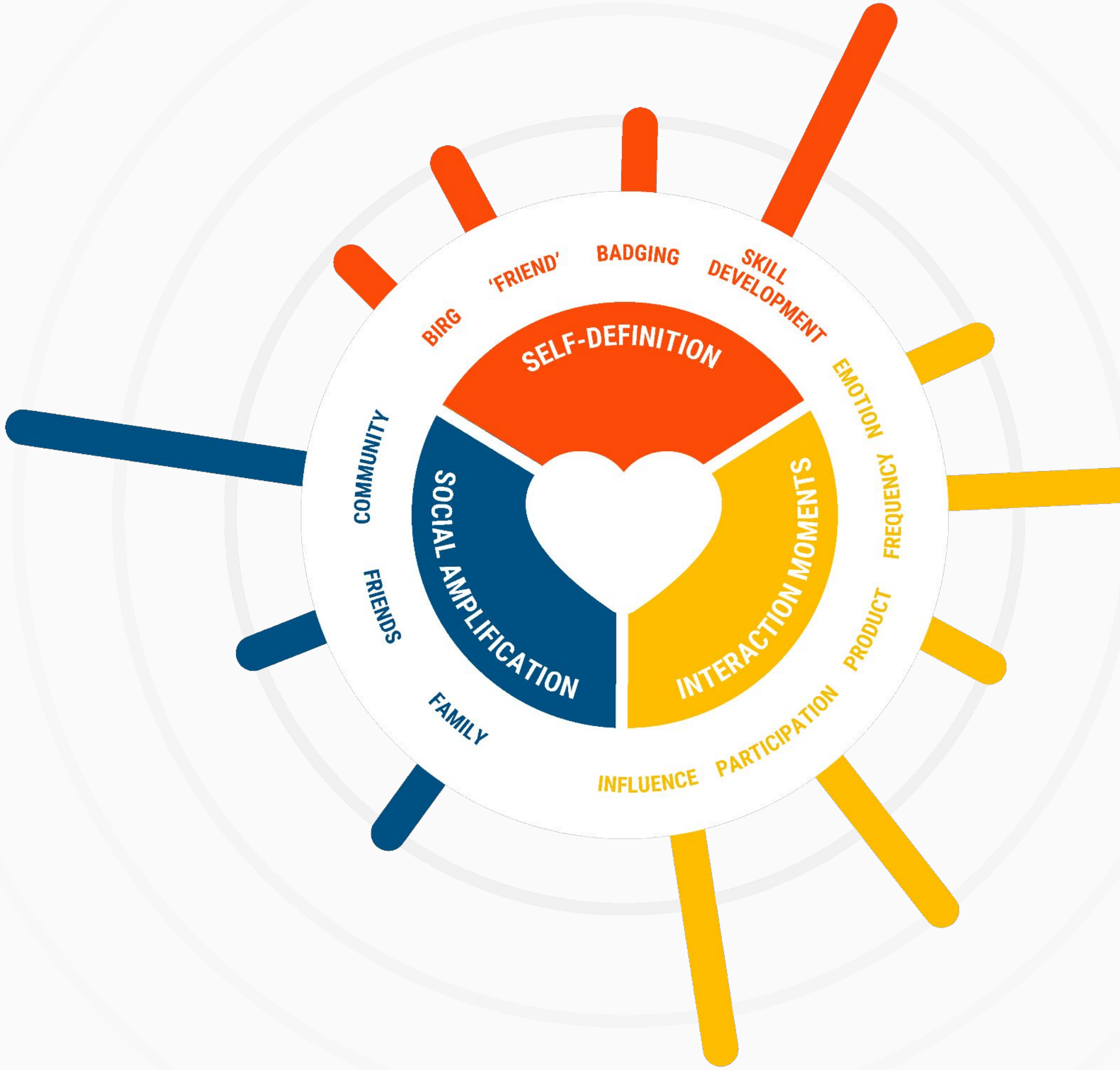
Through lots and lots (and lots) of talking to families all over the world, KI have become experts in fans and fandom.

Over the course of many research projects, KI has spoken to over **50,000 families** to develop a model that helps us understand what fandom means and how we can support its growth.

Our Fandom Model is dynamic, and considers three key areas:

1. The **transactional** moments between fan and brand
2. How a fandom can be used as a part of a fan's **self-definition**
3. The role that different **social groups** can play in spreading and supporting fandom

Importantly, it's a model we are always **striving to update!**



External pressures mean that fans are spending less in-depth time with any one brand.

This can be a tricky one to navigate for brands and content creators, as it often means that families are not developing meaningful connections with brands, which impacts **recall, affinity and advocacy**.

Fandoms are harder than ever to create! And there are a few key factors at play here:

1. The overwhelming choice and access available to the global family, who have an average of **6.1 types of devices** and **5.1 platforms** they use to access content
2. Their **viewing habits**, which include dual screening, continuous partial attention and content switching
3. The UX of the content platforms they use, particularly **quantity-based platforms** like YouTube and TikTok

We found that amongst children who had unrestricted access to content and platforms (so no parental moderation), their likelihood to have a fandom was **much lower**!

In a world where fans have more immediate access and input to lots of different fandoms, fandom has shifted in some rather fundamental ways, and fans expect different things now to previously.

A number of fandom areas related to our Model have become more prominent in the past few years.

1. **'Friend':** The brands that have the most fervent fans spend more time developing personal connections
2. **'Influence':** More children and adults expect and actively value having a creative influence on what brands do with fandoms
3. **'Community':** Digital communities are playing more of a role in children's fandoms than ever before, and at an earlier age than before

In a fast-paced digital world where things are shifting and changing all the time, there are a few key things that children will come to expect more from brands as standard when experiencing fandoms.

1. **Faster response times to their needs and wants as a fan…** With 84% of children engaging with UGC globally, the expectation is to have things here and now

2. **Greater links to their lifestyle and reflection on their values…** Especially for teens, fandoms that flourish are able to permeate into their lifestyles and self-definition – something which helped make Stranger Things such a success (mullet anyone?)

3. **Increased participation with a brand, in their own creative and social way…** The most successful fandoms often have lower barriers to creative expression and invite fans to take part together

BRANDS MENTIONED...

- BTS
- Warrior Cats Hub
- Netflix's Wednesday
- Fortnite concert travis scott
- Taylor Swift
- Netflix's Stranger Things

PLUGGING MY BAND

IRON EAGLE

LINK

3 Futurology

Aleksandra Szczerba - Researcher
Chloë Bartlem – Senior Researcher
Carlene Wilson – Senior Researcher

Let's look into their crystal balls and tell us what the future holds for the global family.

The world has some BIG expectations and predictions for Generation Alpha. According to adults, they are protestors, change makers, movers and shakers. They are set to be the the most affluent and authentic generation so far. But we have to remember – right now, they are just children.

They have normal everyday kid worries, like feeling the pressure to do well at school, but they also have very adult worries: **24% of children globally** are worried about current news and events.

This concern in the present day stretches to the future. The effects of crime and violence, and the shifting state of the climate and environment, are the top 2 worries for children globally.

Despite this, they are generally feeling positive about the future. That's what **74% of kids** globally tell us anyway!

This is a goal-driven generation, driven by concrete, realistic aspirations: their top 3 priorities are a good education, a well paid job and to simply be happy.

While 22% of children told us they want to change the world for the better (which aligns with the belief system associated with this generation of championing causes) we're also seeing the emergence of a more 'realistic' mindset. For 49% of children globally, **a good education comes first**. If they want to change the world, they know that they need to be fully equipped and armed with the knowledge to do so.

31% of kids globally shared their worries about **the lack of jobs and financial problems** – which could be contributing to their 'hustle' mindset, leading them to find creative ways to make money.

While they may jump on the Roblox bandwagon and monetize their hobbies in the short term, long term we're expecting to see a movement towards letting kids be kids, which will free up space for **more dreaming and blue sky thinking**, which of course will eventually yield benefits for them.

Conversely, their parents are more concerned with their children developing 'soft skills' in order for them to succeed in the future.

44% of parents globally believe that **confidence is the most important skill** for their children, followed by independence, self awareness and the ability to communicate well with others.

Even though, for now, 'harder skills' have been de-prioritised from a parental perspective, in an ever evolving digital world that is packed with misinformation, we will soon start to see increased value and importance put on **independent, critical thinking**.

The pendulum will become balanced again and parents will look to engage with brands that are able to provide a balance between soft and hard skills.

Right now, there is a desire among the children we surveyed for stable, traditional and familiar jobs. Which makes sense given at just 13, the oldest in our survey is still years away from entering the world of employment.

We know that the future is unpredictable and both parents and children will need help to navigate the evolving job market – the jobs that this generation will be doing in twenty years time probably haven't even been invented yet! So brands centred on education on the spectrum of jobs available will be appreciated.

Throughout their late teen and early adult years, this generation will **continue to learn and upskill**. Portfolio careers will become increasingly common and used as an outlet for creativity, and their careers will become more and more diverse as a result.

ABOUT US

We're the only full-service marketing agency with over 20 years of experience that specialises in the family market. We connect human emotions with market intelligence to make your business even stronger. No other agency team has this much experience and expertise in the family market.

Each of us is expert in our craft and in our specialism of the family market. You don't just get a great researcher or designers to work on your business – you get a great researcher or designer that is also an expert in the family market.

We believe in knowledge as capital. We constantly invest in our team and our understanding so that we can share this with our clients. Our depth of knowledge means we shorten timelines and increase efficiencies.

Partnering with KI enables your business to connect with children and parents more effectively by leveraging over 20 years experience we make available to you and your project.

The Global Family

Thank You

If our research has piqued your interest and tickled your fancy, get in touch to see what KI can do for you.

Please email:

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