THE FUTURE OF FAMILIES

#BRITFUTURE

PHOTOGRAPHY BY PETER DENCH
OMD UK and Time Inc. UK are proud to introduce the Future of Families, a collaborative research project and the latest installment of OMD UK's proprietary research initiative, the Future of Britain.

OMD UK launched the Future of Britain in early 2013, with the goal of better understanding our changing British society, and ultimately to unlock the valuable insights that brands need in order to better relate to the wide range of audiences that are emerging and evolving all around the nation.

The Future of Britain began by charting the impact of the economic downturn on the British consumer. Insights around brand transparency, community responsibility and ever-present technological influences informed the project’s next stage: Living with Future Britain.

Using innovative research methods, OMD UK got up close and personal with the nuances of British lives. With a bespoke mobile research app, OMD UK was able to gather insight on everything from respondents’ most trusted brands to the contents of their fridges. OMD UK delved deep into many facets of modern British life to understand the connections that brands have with their audiences’ lives, and where further connections can still be made.

A clear thread of our research is that media has a wider scope than ever before to forge powerful and significant relationships with audiences. Throughout our research we have pinpointed great examples of brands that have solved a problem or added new value to their audiences’ lives through creative media use. We also realised that we could not ignore the flux occurring across British families; our first wave of research uncovered Generation Rent, and from there additional changes kept on emerging, indicating significant shifts for the family unit as a whole, but also for individual audiences in their own right.

Our ambition to get closer to the British family was shared by Time Inc. UK. With over 60 iconic media brands that operate across print and digital channels, Time Inc. UK connects with millions of people every day, captivating and inspiring them with its content and messages. In the home and lifestyle space, Time Inc. UK resonates with a huge swathe of the British population, and with such privileged access, OMD UK and Time Inc. UK launched the Future of Families to discover more about one of the central facets of modern British life.

The project has brought to light a wealth of insights that reposition the concept of ‘family’, and clarify many outdated industry preconceptions of the modern British way of life. Our key findings fall into four categories, and the following pages will highlight the major themes of each one – simply click below to explore our research:
2.4 NO MORE

UNITED UNDER PRESSURE

VIRTUAL FAMILIES

COMMUNICATING WITH FUTURE FAMILIES
2.4
NO MORE
64% of all grandparents look after their grandchildren.

36% of 16-24s have advised their parents on a major life decision.

Parental roles are blurring traditional boundaries.

Ethnic households set the trend for multi-generational living.

Double the average white British household.

Family is an idea, not an institution.

The family home is not something to be ‘escaped from’ but a safe haven; somewhere to be cherished.

Gilly Sinclair, Editor Chat & Pick Me Up.

Click on the infographics to find out more (you can also navigate via buttons bottom right).
A fundamental discovery throughout our research has been that the traditional model of the ‘2.4 family’ no longer exists, both in the reality of typical family structures, but also in terms of people’s perceptions. If audiences ever completely subscribed to such a notion of family in the past, they are now looking for a more fluid concept to accommodate the realities of modern life.

As remarrriages, co-habiting couples, separated couples (with or without children), civil partnerships and single parents are all accepted and commonplace ways of life, so the fluid idea of family prevails over a rigid model. For our respondents, blood ties need not dictate family: friends (19%) and of course pets (29%) are now widely accepted core components of the family.

Our Future of Families research has shown that now, more than ever, brands must be more nuanced in approaching family communication and update their own pre-defined family concepts.

Here are some of the major areas of change in British family living that we have identified, all offering new avenues for brands to build relationships with a complex and evolving audience.

The best place to start for a sense of how things are changing in the modern British home is with the parents. As with so many trends amongst these audiences, there are no blanket statements to package the parental experience neatly. To say that the roles of mum and dad are indistinguishable is too simplistic, but there is a significant blurring of the traditional boundary lines. Incremental shifts in parental roles show that parents now collaborate on many aspects of family life and decision making rather than holding individual responsibility of the past. For example, our respondents reported sharing ‘taxi’ duties (45%) - traditionally a role adopted by dad - teaching their children values and morals (62%), and sharing of ‘general childcare responsibilities’ has grown from 54% in 2008 to 67% today.

The traditional lines of family responsibility also blur across generations, with an increasing reliance on grandparents who look after their grandchildren while parents are out to work. The ‘Grandminder’ is a true asset to the modern family, with an estimated saving of £7.3bn per year in childcare fees (Grandparents Plus and Age UK, 2014).

However, our research has established that repayment is not always proportional to the service – or even offered at all! We have found that 64% of all grandparents look after their grandchildren, and as this is generally a source of pleasure the vast majority of grandparents are happy to help (85%). This is just as well, seeing as so few of them (just 15%) receive any significant thanks for their efforts.

Crucially, we can see that this senior generation plays a much more significant role in family life than previously thought. This is of special importance when considering a young audience or catering to the family group, which is now a broader range of people than it was once seen to be.

Contrary to the stereotype of the disaffected teenager, sick of home and parent, we are now in an age where young people are increasingly attached to the family home with the presence of grown-up children in the household up 25% (ONS 2014). Through the rise of Generation Rent and the Boomerangers, we are now seeing that this new, accepted way of living is positively embraced by parents and children alike. 77% of parents agree that their children will be living at home longer in future, and half of these have reported a positive effect on the household when they return.

For Generation Rent, the optimism is shared, with only 13% of those who still live with their parents claiming a negative effect from it:

“I’m happy. I love my mum very much and I enjoy the quietness of the house compared to student housing.” Female research respondent, 18-24

The increase in multi-generational British households has huge possibilities for brands looking to capitalise on new relationships and new influencers within the family unit. Generation Rent plays a significant role here with 36% having advised their parents on a major life decision.

And their influence doesn’t stop at giving ‘life’ advice. Our research showed that in everyday purchase decisions, grown-up children in the family are advising their parents on everything from cars to electronics, even laundry detergent, and their advice is being listened to:

“I advised my mum on buying a kindle. I showed her how mine worked and she borrowed it for a while. Now she’s hooked!” Female, 26-29

The multi-generation household is not a completely new concept, and many ethnic families have been operating that structure for years. To compare: White British, Indian and Pakistani households show an average of 2.1, 3.3, and 4.1 members respectively.

A recent study from the Policy Exchange (A Portrait of Modern Britain, May 2014) revealed that by 2050 a third of the UK population will be of ethnic origin, which can only suggest that these family structures and multi-generational living will only continue to grow.

It is our view that the proliferation of larger households will continue to demonstrate a net positive impact both financially and emotionally for individual family members and for the family unit as a whole. The sustained and growing trend of this way of life suggests that phenomena like Generation Rent and the Grandminders are less likely to be signs of an economic blip, and more indicators of long-term shifts in family living.
UNITED UNDER PRESSURE
“Families have become more reliant on each other for support. So where once they might have moved away, they are now more inclined to live closer so that they can call upon each other for help.”

-Male, 25-34

“[My kids are] 21 and 23 and [I] am more than happy for them to stay as long as they want. Both work, neither pay board. I wouldn’t have it any other way.”

-Female, Chat Reader, Facebook

Financial pressures are still front of mind, but we’re coping.

The family support network is broadening.
Times may be changing for the British family household, but the common stresses that families experience are not dissimilar from those of previous years and generations. Work stress, including job security, childcare and time constraints featured prominently amongst our findings, but it is the financial pressures that are still front of mind. In particular, the cost of living is a concern for 7 in 10 people, and a further 1 in 3 are worried about their rent or mortgage payments.

But what is encouraging, is that we are witnessing a shift in attitude towards these pressures, and increasing optimism from family members was prevalent in our findings. 68% of women today agree that their finances are in order, compared to just 57% in 2009 (Time Inc. UK Origin Lounge) and 24% of mums think they will be better off in the coming year, compared to just 13% in 2011 (Time Inc. UK Origin Lounge data).

The increasing trend of Generation Rent and the Boomerangers, has implied additional financial strain on the family with 48% of parents in our study reporting increased financial implications from having their children live at home for longer. However, optimism continues to shine through as our research also suggests that parents are in favour of this way of life: 60% claimed they will support their children financially for “as long as it takes”.

“[My kids are] 21 and 23 and [I] am more than happy for them to stay as long as they want. Both work, neither pay board. I wouldn’t have it any other way.” Female, Chat reader, Facebook

In some cases, welcoming grown-up children back into the home, or encouraging them not to leave, has also had a positive financial impact on some British families with 31% of parents claiming that family financial strains have been reduced by having grown-up children live with them. Only 10% of the grown-up children living at home in our study make no grocery bill contribution and only 14% pay no rent.

One of the contributors to the increasingly positive outlook that we are witnessing seems to be the growth of mutual support from within the family unit.

“Families have become more reliant on each other for support. So where once they might have moved away, they are now more inclined to live closer so that they can call upon each other for help.” Male, 25-34

Importantly, the flow of support within the family flows up through the generations as well as down, as we would expect, with 1 in 3 parents seeing their children as providers of emotional support. Peer-to-peer support is also widely acknowledged with parents rating each other highly for providing emotional support (interestingly, our research showed that they rate each other higher than they rate themselves) and once again our research proves that families are more than just a network of blood ties now: Mum’s seek advice first and foremost from their friends (60%), closely followed by their partner (58%) and then their own mothers (52%).
VIRTUAL FAMILIES
OF FAMILIES INSTINCTIVELY BELIEVE THAT TECH ISN’T DISRUPTIVE AT HOME

78%

WATCHING TV IS ‘VALUED TIME TOGETHER’ FOR 68% OF FAMILIES

IT’S TOO EASY FOR MY CHILD TO GET ACCESS TO THINGS I COULDN’T HAVE EVEN DREAMED OF WHEN I WAS YOUNGER. I HAVE PARENTAL CONTROLS ON MOST OF MY DEVICES BUT SOME THINGS STILL SNEAK THROUGH

TECH IS HERE TO STAY AND WILL IMPINGE ON FAMILY CONVERSATION, BUT WILL INSPIRE IN EQUAL MEASURE

CATHERINE WESTWOOD, GOODTOKNOW.CO.UK
Technology remains something of a double-edged sword in the British home today: while our research shows that a large proportion of families instinctively believe that technology is not disruptive at home, we have also seen some fears and insecurities around technology that are expressed by both parents and children.

“It’s too easy for my child to get access to things I couldn’t have even dreamed of when I was younger. I have parental controls on most of my devices but some things still sneak through” Female respondent, 38

Over the course of our research, we discovered many instances of phones or other devices being seen as disruptive and having a negative impact on family time together – this sentiment was shared by teenagers as well as adults, contrary to traditional views of the young technophile in battle with their tech-wary parents.

Parental concerns are more focussed on the safety of their children; current solutions to this include banning and parental controls on devices but, despite these precautions, it’s clear that parents never feel completely in control of their child’s digital lives. Our research has shown the prevalence of received wisdom and hearsay on this topic that is the main driver of parental concerns.

While the responsibility lies with parents, and they do not wish to use the dreaded ‘electronic babysitter’, brands have a clear role to play here by leveraging existing trust relationships and expertise in the right fields. Advice given over editorial media can support technology that exists, such as the Dinner Time App, to help parents get to grips with the ever-changing digital world.

On the other end of the scale, social media and shared TV experiences are fuelling quality family time for 68% of our respondents. Families are able to use technology for on-demand or streamed shows that allow for families to plan specific times together, but they also share live event TV, which is growing in importance as social media fuels conversations around a range of live programming.

Mobile devices are really opening up family time together; as family members no longer need to retreat to separate rooms to use technology and can happily use multiple devices within the same room, brands will need to rethink their use of media at these valuable family times. Separate TV and mobile/digital plans must now give way to a ‘living room plan’ which is able to follow conversations that span media as well as audiences.

“Tech is here to stay and will impinge on family conversation, but will inspire in equal measure” Catherine Westwood, Goodtoknow.co.uk

Family conversations are not strictly governed by the box, however. With the whole family in one room, sharing valuable time together means sharing news and thoughts from each member which of course means a more diverse set of audiences interacting and consuming media in the same place. Therefore brands should consider the ‘living room plan’ as not just another set of media channels to reach an audience, but also an ‘open door’ through which new audiences can be reached with new messages that enhance and augment the mainstay of the TV spot.
Having explored three major aspects of family life, we are left with the question of how best to communicate with families in the current social climate. With so much happening in the household, and no one-size-fits-all model to follow, brand and communication planning must adapt accordingly.

With this in mind, we have identified four key areas that we believe will help advertisers work with the vibrancy of the modern family:

1. **CHRISTMAS EVERY DAY**

   A diversified ethnic population brings greater texture to our cultural calendar, presenting us with a year-round schedule of major events that all represent potential audiences for a range of brands. Brands are now only just starting to find a tasteful way of conveying brand messages in new cultural contexts such as Eid and Diwali, deepening brand appeal for new British audiences.

   In addition, progressive brands recognise that ethnic audiences have dual media identities, switching between mainstream UK media and their own native media brands. This represents a huge opportunity to develop more nuanced strategies.

2. **FROM TV SPOTS TO LIVING ROOM PLANS**

   The living room is the heart of family conversations around brands and media, and the presence of multiple screens and screen-switching behaviours mean that we should be planning for the whole room rather than the main set alone. Firstly, technology can allow us to cement attention by allowing us to target devices at key moments of airtime. More interestingly, we can now layer our TV spot with additional levels of communication to add depth, or engage multiple audiences.

   The traditional TV spot can be used as an open door to any number of different audiences in the family group – using innovative digital approaches is key to making the transition from TV to other platforms a smooth one. TV magazines also allow a seamless link to families’ favourite shows, complementing TV spots with engaging print content.

3. **WHO ARE YOU REALLY TALKING TO?**

   With the growth of young adults in the British household having an increasing influence on product decisions, so the traditional ‘pester power’ approach grows up. With a group of influencers living alongside key decision makers, brands have a unique opportunity to widen their messaging and reach a newly influential audience in the family.

   Although this area has yet to be truly recognised by most brands, we have seen a few examples of brands beginning to adopt this approach, ranging from car manufacturers to energy companies – they recognise that household decision-making models are changing and are capitalising on the opportunity to communicate with multiple audiences at once.

4. **HELP FAMILIES EMBRACE TECHNOLOGY’S VIRTUES**

   Our findings have uncovered a great deal of conflict on the subject of technology in the family. On the one hand, families claim that technology does not interfere with their lives, but there are also deep-seated concerns across generations around privacy and a decline in personal communication. There is huge scope here for brands to bridge the gap, capitalising on technology’s strengths to empower parents and unite families from any distance.

   The key here lies in empowerment. Brands which arm parents with the information they need to navigate the world of technology more safely with their children, or inspire them with the possibilities to connection and creativity, will prosper. Additionally, successful organisations are recognising the increased adoption of technology amongst grandparents, and helping them to get more from it – as seen in the recent Barclays Digital Eagles work.
We hope that you have found this overview useful. If you would like to know more about the project, a specific area of insight or discuss how our findings can benefit your business, we would love to hear from you.

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