



| InsightsLab

THE MODERN FAMILY

CULTURE, CONNECTION AND COMFORT IN AN ERA OF CHANGE

In partnership with KANTAR CONSULTING



"With category-leading brands such as *Reader's Digest*, *Taste of Home*, and *Family Handyman*, Trusted Media Brands has always been at the forefront of understanding changing family dynamics—across generations, attitudes, values, and priorities. As modern families continue to evolve, so too should brands' marketing approach, and this study identifies the unified themes that impact how modern families spend their time and money."

BONNIE KINTZER
TRUSTED MEDIA BRANDS PRESIDENT AND CEO



INTRODUCTION

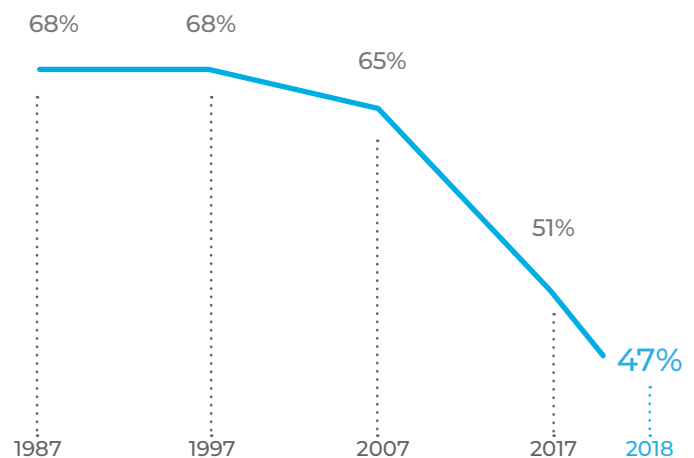
Why Study the Modern Family?

American family life today is in a state of flux like few times in its history. Once the norm, the traditional family unit now makes up less than half of all families in the U.S. In its place, thousands of different household arrangements have arisen, making the "typical" American family impossible to define. Meanwhile, a variety of factors – changing gender dynamics, the emergence of disruptive in-home technologies, rising numbers of Millennial-led and multicultural families, among others – are changing the look, feel, and even the very nature of family life. Finally, with Americans feeling less connected to their fellow citizens than any time in recent history, people are turning to smaller circles, and longing for a greater sense of belonging to their community, friends, and, above all, family (see fig. 2.1).

In short, American family life is nearly unrecognizable compared to even just a decade ago.

Fig 2.1

IN GENERAL, I FEEL THAT MY PERSONAL VALUES AND POINT OF VIEW ARE SHARED BY MOST AMERICANS TODAY



Kantar Consulting, 2018 U.S. MONITOR

TODAY'S MODERN FAMILY

Fig 3.1



Trusted Media Brands, the publisher of *Reader's Digest*, *Family Handyman*, and *Taste of Home*, in partnership with Kantar Consulting, undertook a multi-phased study of today's modern families. Instead of focusing upon the variety of ways that modern families differ from one another, we set out to illuminate the attitudes, values, and priorities that are *shared* across families regardless of age, household income, ethnicity, or sexual orientation. To accomplish our objective, we applied a mix of quantitative and qualitative techniques – including fielding a robust survey of 3,500 American families as well as 250 digital interviews with more than 50 family households across the country -- and explored the following critical questions:

Ultimately, we found that there is no singular definition of today's modern family. However, we did find new trends that are redefining common perceptions of quality time, the evolving meaning of home, desired experiences, and the role of diversity in the family.

The following is the first release in a three-part series identifying three prominent trends that are shared across today's modern families:

1. **The Home-basing Trend**
2. **Cultural Exchange**
3. **Digital Connection**

- ① What is the state of American families today?
- ② How are shifts in household structures changing the look and feel of family life in America?
- ③ How are families adjusting and reacting to the vast cultural and technological change occurring in the U.S. today?

91%
My family is the most important thing
in my life

2018 Trusted Media Brands Modern Family Study

Fig 3.2



home-basing (noun / verb)

home·bas·ing | hōm-'bās-nīŋ

**The act of staying home (vs. going out)
to share experiences with family
and friends**

THE HOME-BASING TREND

STAYING IN IS THE NEW GOING OUT

America is becoming a nation of homebodies.

Instead of filling their free time with active, social events, modern American families are more often opting to stay in, surrounded by a close circle of family and friends in the comfort of their own homes. The Millennial generation has shown a clear preference for this lifestyle, meaning it's likely a trend that is just getting started – **78% of Millennials say they would rather stay in with their family than go out**, virtually identical to the 80% of all families that agreed with the same statement (see fig. 5.1).

The reasons behind this change are manifold, ranging from stagnant wages to the divisive political environment to an explosion of on-demand entertainment and delivery options at home. But

**"The American dream home is one
you never have to leave."**

**– Candace Jackson,
real estate journalist**

what's not in question is how the home-basing trend is affecting the consumer marketplace: it's altering the outlook of industries such as entertainment (movie attendance is at its lowest level since 1995), housing (the relocation rate is at its lowest rate since the Census started measuring it 50 years ago), restaurants (people now eat at home 80% of the time), home improvement (home remodeling expenditures are expected to rise 7% through 2019), and even energy (a recent study found Millennials preference for home-based activities decreased overall energy consumption by 2%).

Fig 4.1



↓ 6%

The percentage decrease in the number of movie tickets sold since peak in 2016 (the lowest level since 1995)



↑ 11%

The percentage increase in entertainment spending in the home (such as streaming services) since 2016

Motion Picture Association of America, THEME report, April 2018



Fig 5.1

78%

of family members agree,
"My family makes sure to set
aside time regularly for family
meals or gatherings."

80%

of family members agree,
"I would rather stay in with
my family than go out."

with nearly the same percentage (78%)
of today's Millennials saying so.

2018 Trusted Media Brands Modern Family Study

We've uncovered several key insights that inform how the marketplace needs to adapt to the changing modern family.

1 Modern families desire *comfort* above all:

The home today is no longer a means for status-seeking and bigger is no longer better. Today's home is above all a sanctuary for modern families and a place to be productive, to connect, and recharge. When asked to describe their homes, "comfortable" was the word chosen most often (81%) and across family types whether multi-generational, multicultural, single parents, or families with young children.

TOP WORDS THAT DESCRIBE YOUR HOME:



Fig 5.2

IN THEIR OWN WORDS



PLAY VIDEO

HOME-BASING IN THE MARKETPLACE

Board Game Nation

Drawn to its more intimate, slower, and more human qualities, American families have rediscovered board games. According to research by the NPD Group, the games and puzzles category (which includes board games) sales grew 24% in 2017, a far faster pace than the overall growth in toys. As Tristan Donovan, author of *It's All a Game: The History of Board Games from Monopoly to Settlers of Catan*, told Knowledge@Wharton, "There's something about board games bringing us together around one table, everyone focused on that task, not distracted by what's happening on social media or on their phone. Everyone's focused on that game, playing together, seeing the whites of each other's eyes."



② Modern families see *flexibility* as a “must-have” in modern homes:

As the home becomes more central, we found that families of all types are seeking homes that can “flex” with the changing demands of their families (for instance, by accommodating a cash-strapped Millennial child or older relatives into the home). **63% agree, “We are adapting our home as our family structure changes”** and 79% among multi-generational families. The leading home builder in the country, Lennar, is investing in multi-generational housing developments, and new homes today are more likely to be built to appeal to Millennials’ taste for adaptable spaces that serve a variety of lifestyle choices.

③ Modern families have an *always-on* mindset of home improvement:

As more families are choosing to stay in and adapt their homes, and as first-time Millennial buyers are better able to afford and even prefer existing rather than new homes, the DIY mindset is taking hold across families and household types. Sales at home centers such as Lowe’s and Home Depot are expected to rise to \$279.5 billion by 2021, and **nearly three-fourths (72%) of American family households agree, “We are always looking to improve our homes.”**

④ Modern families are embracing *moments* that allow more intimacy:

Our research found that activities such as socializing or just hanging out, watching movies or TV together, playing board or card games, and cooking together are among the most popular “quality time” activities

across virtually all modern family types (see fig 6.2). And Millennials are evolving the concept of quality time, more likely to consider video games (69%), exercising together (70%) and volunteering (70%) as activities that bring families together.

Fig 6.2
TOP QUALITY TIME ACTIVITIES



2018 Trusted Media Brands Modern Family Study

⑤ Modern families are *protecting time* with their families, especially the family meal:

As an antidote to the digital distractions and competing schedules, all families are increasingly carving out and planning for quality family time. **We found that 78% of modern families agree, “My family makes sure to set aside time regularly for family meals or gatherings.”** One beneficiary of this shift is a reprioritization of the family meal: while it’s hardly ever been more challenging to secure the physical presence, never mind attention of various family members, **9 of 10 modern families agree, “Eating dinner together is a priority in my family”** (see fig. 6.1). ”



“Eating together as a family is a very high priority for us. Two of our sons are still at home, and one is nearby at college. Our college son joins us for dinner at least four times each week, usually with his girlfriend. The TV is off, we don’t answer the phone, and we enjoy being with each other.”

Sara,
Madison, WI



CULTURAL EXCHANGE

A NEW BLEND OF FAMILY AND TRADITION

If you follow the news today, the message is clear: We are a divided nation, fueled by a mix of fiery political rhetoric, continuing disparities in economic opportunity, and hot-button issues such as immigration. With Americans' worries about race-relations hitting a 17-year high in a 2017 Gallup survey and demographic forecasts projecting a "majority-minority" culture in 2045, it's understandable to conclude that the tension will only accelerate in the years and decades to follow.

What's not being reported is a very different narrative of today's modern families – regardless of ethnic makeup – adapting to, accepting, and embracing diversity in their homes and lifestyles. For instance, according to our study, **nearly three-fourths (71%) of modern family members agree, "I see the increasing diversity in the country as a positive thing for me and my family,"** (see fig. 4.1). And this number rises to 83% among multi-cultural families.

This perhaps surprising acceptance of difference and demand for inclusivity is a thread that runs throughout our research on the modern family:

Fig 4.1

71%

agree,
I see the increasing
diversity in the country
as a positive thing
for me and my family.

MULTICULTURAL FAMILIES	83%
SINGLE PARENTS	82%
MULTI-GENERATIONAL	80%
YOUNG FAMILIES	79%
EMPTY NESTERS	64%

2018 Trusted Media Brands Modern Family Study

1 Modern Families are increasingly open to other cultures

According to Kantar Consulting's U.S. MONITOR tracking studies of American consumers, the percentage of Americans who feel strongly attached to their family's culture rose from around one-in-four to about one-in-

three in recent years. But this isn't cultural indulgence: The percentage of people who are highly open to *other cultures* rose even more strongly – **44% to 58% from 2011 to 2017** (see fig. 5.1). Although people continue to value their inherited culture, they're far more open to participating in and (at least partially) adopting the cultures of others.

Fig 4.2

73%

of families with kids
agree.

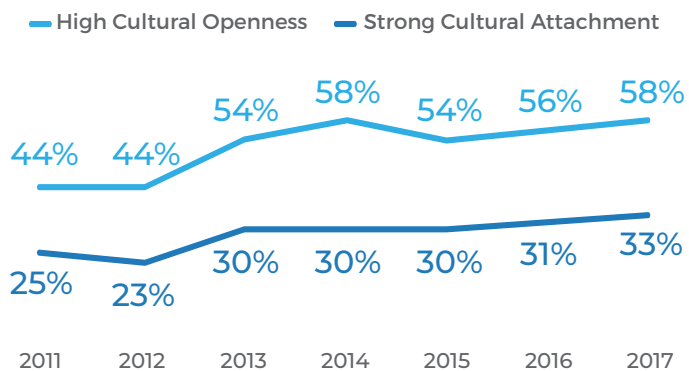
"I try to educate
myself and my family
about traditions and
celebrations that are
different than ours."

2018 Trusted Media Brands
Modern Family Study



Fig 5.1

CONNECTION WITH CULTURE OVER TIME



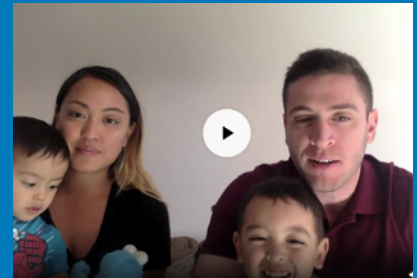
2018 Kantar Consulting U.S. MONITOR

This cultural openness is even more pronounced among today's modern families – especially among households with children: **73% of all families with kids in the household agree, “I try to educate myself and my family about traditions and celebrations that are different from ours.”** (see fig 4.2). This trend is impacting everything from ethnic foods and beverages sales (20% increase from 2013-2017), observed holiday celebrations (the Chinese New Year and two Muslim holidays were recently added to the New York City public school calendar), and multi-cultural advertising spending (Hispanic digital advertising budgets will more than double by 2020).

② Modern families are redefining “family” and traditions

While modern families are integrating customs and celebrations from other cultures, they're also creating new family traditions that reflect their own unique family structures and values. **Seven in 10 (72%) agree, “My family**

IN THEIR OWN WORDS



PLAY VIDEO

CULTURAL EXCHANGE IN THE MARKETPLACE

23andMe's “We are all connected”

23andMe's ad campaign “We are all Connected” shows how DNA kits are not only enabling deeper connection to one's culture, but also providing opportunities to explore different ones.

PLAY VIDEO

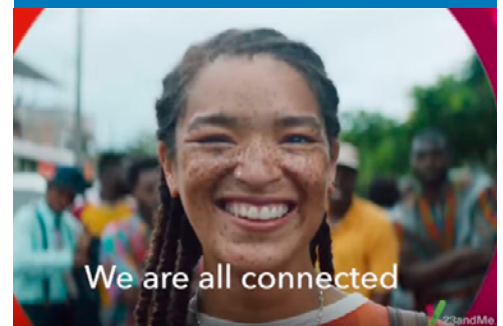


Fig 6.1

72%

agree,
"My family creates
its own unique
celebrations."

2018 Trusted Media Brands
Modern Family Study

creates its own unique celebrations" – fig. 6.1). Examples include "cooking Sunday" (in which meals for the week are prepared with grandparents each week), "Friendsgiving" (Thanksgiving, but with friends), and "Gotcha Day" to celebrate adoption anniversaries.

Driving these new traditions is not only the growing variety of family structures but also new definitions of "family," particularly among millennials: **Fully half (50%) of this generation, born between 1979 and 1996, include pets as being part of their family, and 39% of them consider friends as family members.** (Fig. 6.2)

Fig 6.2

THE DEFINITION OF FAMILY IS EXPANDING



Among Millennials,

50%

consider pets

as members of their family



Among Millennials,

39%

consider friends

as members of their family

2018 Trusted Media Brands Modern Family Study

3 Many modern families are seeking greater cultural intelligence and understanding from brands

As diversity has become a more prominent aspect of American life, Madison Avenue and Hollywood have responded by creating more culturally attuned products, services, and messages for this sensibility. But, according to our research, more still needs to be done to make all family subsets feel included. For instance, according to 2018 U.S. MONITOR data, a strong majority of all types of modern family members agree, "I am frustrated by brands that treat people like me as an afterthought" (see fig 6.3).

As the family becomes more diverse, consumer frustration is only likely to grow unless marketers and the media develop a deeper, more culturally nuanced understanding of the nation's fastest-growing segments.

Fig 6.3

"I am frustrated by brands that treat people like me as an afterthought"

SAME SEX FAMILIES

68%

MULTICULTURAL FAMILIES

67%

MULTI-GENERATIONAL FAMILIES

65%

SINGLE PARENTS

64%

YOUNG FAMILIES

60%

2018 Kantar Consulting U.S. MONITOR

"Both of my kids are adopted and every year I celebrate each of their 'Gotcha Days.' "

KAREN, 52



THE DIGITAL CONNECTION

BRINGING FAMILIES TOGETHER

The national dialogue about the effects of digital technology on family life has taken a decidedly negative turn as scholars and the media alike continue to critique technology's impact on our privacy, attention spans, mental health, and relationships. As a result, terms such as "digital detox," and "unplugging" are now mainstream.

However, this narrative misses the ways in which families are positively embracing digital technology in their homes and everyday lives. In fact, as our new research on the modern American home and family shows, digital technologies play an essential, even indispensable role in family life. And, while it's true that many families are seeking sensible cutbacks to "screen time", our research suggests that what has been overlooked are the ways in which technology is also improving family life and connection.

Our research reveals that:

Fig 4.2

By 2021, there will be almost as many voice-activated assistants on the planet as people

Source: Ovum Research

① Modern families *don't* perceive technology as hindering family relationships:

The stereotypical perception is that of distracted family members with eyes glued to their screens, idly scrolling through their social media newsfeed instead of interacting with their friends and loved ones. Yet, our research found that **just 15% of families say technology has made their family less engaged** with one another when they're together, and **just 9% say it negatively affects their family's social skills.**

Fig 4.1

86% of families use technology to regularly communicate with other family members.

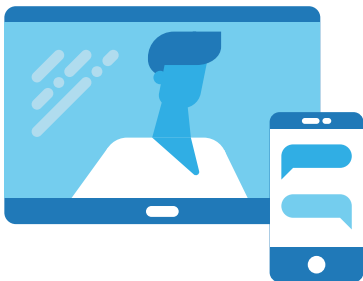
2018 Trusted Media Brands Modern Family Study





Fig 5.1

TOP SOCIAL MEDIA PLATFORMS CONNECTING FAMILIES (among those who use social media)



95%	Facebook 98% of Empty-Nesters
29%	Instagram 42% of Multicultural Families
19%	Snapchat 33% of multi-generational families

2018 Trusted Media Brands Modern Family Study

② Modern families appreciate technology's fun and time-saving attributes:

Contrary to reports on the time-sucking aspects of personal technology, our research found that **64% of modern families believe technology has given them more, not less, leisure time.** The growing

"I believe technology has improved family life; I don't doubt it one bit, the positives far outweigh the negatives."

MELANIE, 58

popularity of voice-activated speakers such as Amazon Echo and Google Home promises to enhance family life in the coming years: **44% of smart speaker owner families say that having the device in their homes has helped them spend more time with other people.** (fig. 6.1) Taking on domestic duties such as compiling grocery lists and scheduling appointments, these voice-activated

devices free up families so they can focus on other, more important tasks and pastimes. In addition, smart speakers are emerging as a facilitator for family fun. Companies such as [Volley](#), which produces voice-controlled games, is growing its user base by 50%-70% month over month.

IN THEIR OWN WORDS



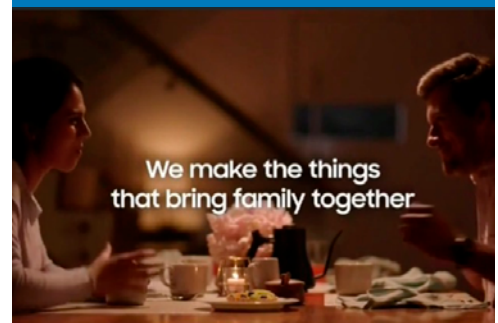
PLAY VIDEO

THE DIGITAL CONNECTION IN THE MARKETPLACE

Samsung's "This is Family"

Samsung's "This is Family" advertisement captures the essence of The Digital Connection trend by showcasing the various ways that its technologies—such as voice-activated and screen-enabled Family Hub refrigerator and "Dinnertime mode" on its Smart TV—fit seamlessly in the home and brings families together.

PLAY VIDEO



③ Modern families value technology's ability to keep them connected:

Overall, today's modern families are highly appreciative of the role technology plays in maintaining closeness between far-flung family members: **61% of family members say technology helps families stay in close touch.** As Kevin, 27, told us, "Technology has definitely positively affected interactions between myself and my family. My wife was living in Japan while I was working in Wyoming, and through the magic of Skype we were able to keep communicating every day and keep our relationship going." Social media is a strong connector for families; and among those who say they use social channels to stay connected, 95% use Facebook and 29% use Instagram (42% among Multi-cultural families). (Fig. 5.1).

Just over 10 years after Apple first introduced the iPhone, it's clear that American families are

recalibrating their relationship with technology in the home. Our research clearly illustrates the ways in which digital technologies will continue to engage, entertain, and enthrall modern families of all types.

Fig 6.1

44%

Smart Speaker owner families say the device helps them spend more time with others

Fig 6.2

64%

of family households agree, "Technology has given me more leisure time."

2018 U.S. MONITOR



WHAT DO THESE MODERN FAMILY TRENDS MEAN FOR THE MARKETPLACE?

HOME-BASING

Get in the Comfort Zone

How can you deliver the comfort that modern families crave?

With anxiety rising and cultural concerns growing, Americans are looking to relax, take it slow, and sink into their sanctuaries at home. Brands that deliver comfortable, collaborative experiences to modern families that both connect them with other family members and allow for individual expression and are set to succeed.

CULTURAL EXCHANGE

Fuel New Traditions

How can you help families celebrate in both old and new ways?

Modern families are forging their own traditions and celebrating cultures different than their own. At the same time, they're also digging deep into their heritage and placing more emphasis upon nostalgia and the past. Brands can and should reflect these new sensibilities and align with a more personalized approach to family culture and celebration as well as highlight the ways that diversity and difference enhances family life.

DIGITAL CONNECTION

Connect with Tech

How can you use technology to connect families instead of distracting them?

With distractions abound, modern families are drawing lines between themselves and the influence of technology. Overall, though, modern families are embracing those technologies that make their lives more convenient and connected—particularly in our increasingly mobile society. Brands that help deliver these positive aspects of technology and focus not just on bells and whistles, but on how innovation brings families together will resonate.



METHODOLOGY

Research for the Trusted Media Brands Modern Family study came from the following three sources:

- A custom, online survey of 3,500 American adults 18+ in families conducted from July 18 to July 27, 2018. Note: "Family" was defined as two or more adults living in a household, with at least one being a family member or spouse.
- 250 qualitative interviews with 50 people through the Voxpopme platform.
- Annual and quarterly surveys from Kantar Consulting's U.S. MONITOR, an ongoing source of insights about the changing attitudes, values, and lifestyle of the American consumer.

Data analysis was conducted by Kantar Consulting.

For more information contact

Babette Lazarus

Senior Executive Director, Insights Lab

Babette.Lazarus@trustedmediabrands.com



InsightsLab





