



MEDIACOM

RWI

Connected Kids **MEDIACOM**

September 2019

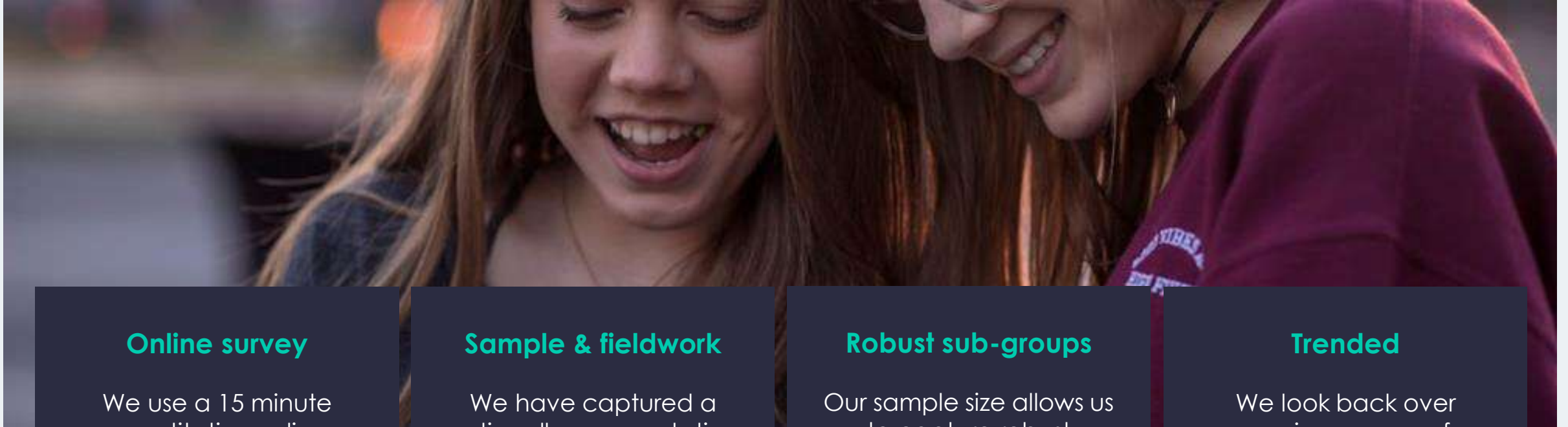
MEDIACOM **CONNECTED KIDS**



An introduction

- Real World Insight (RWI) is MediaCom's research division. Our purpose is to understand people, specifically what they do, why they do it and most importantly how their behaviour can impact our clients' business.
- With this in mind, kids and teenagers are a crucial audience to understand. They are the first generation growing up as digital natives, and the way they experience and interpret the world around them is different compared to adults.
- Connected Kids is MediaCom's youth insight offering. We publish an annual report, currently in its fifth year, monitoring the media habits and attitudes of kids and teenagers in the UK. Within our report, we focus on where brands and advertising fit in, as well as recommendations on how to effectively and responsibly engage this audience.

We survey 1,200 kids and teens up and down the UK



Online survey

We use a 15 minute quantitative online survey. We gamify our survey questions where possible, in order to ensure that kids and teens enjoy taking part!

Sample & fieldwork

We have captured a nationally representative sample of 1,200 8-19 year olds in the UK, with fieldwork taking between 5th-12th April 2019

Robust sub-groups

Our sample size allows us to capture robust demographic sub-groups, which means that we can identify distinctions by gender and age

Trended

We look back over previous waves of Connected Kids to understand how trends develop over time



And engage **our qualitative panel of teens** to dig deeper into their lives

Expanding upon our quantitative findings, we incorporate qualitative insight from our panel of teens.

This enables us to place further context and understanding around some of the trickier 'why?' questions.



To add depth to our findings, we also include wider industry context

Wider context can be found in the form of industry research and trends, as well as brand case studies that exemplify our findings.

Trends

Mintel
Foresight Factory

Wider Frameworks

Thinkbox

Industry Statistics

TGI
Ofcom
Statista

A white smartphone is positioned diagonally on a light-colored marble surface. The screen shows the time 10:24 and the date Monday, 01 September. To the right of the phone, there is a small bouquet of white baby's breath flowers with green leaves.

Our 2019 report covers...

01

Setting the scene

02

TV & Video

03

Social Media

04

Music

05

Attitudes towards the future

06

Key themes



01

Setting the scene

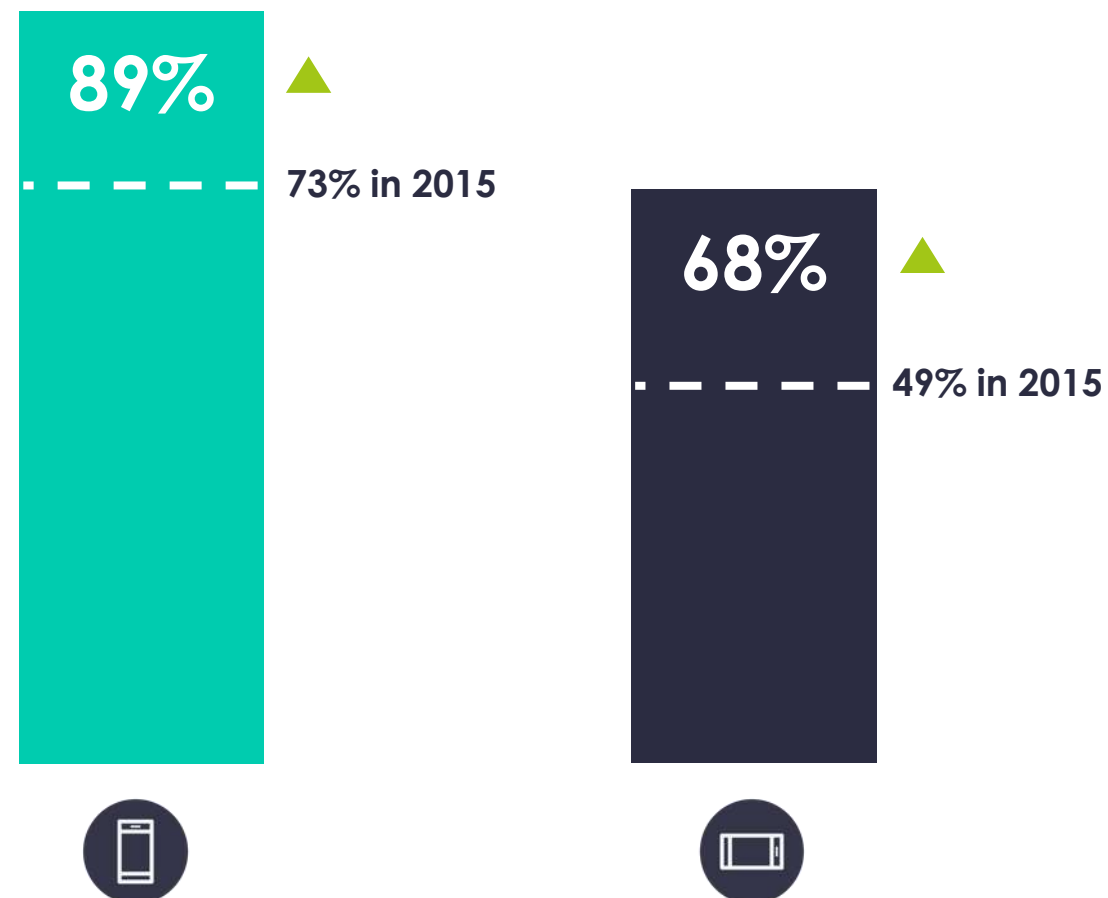
Kids and teens are growing up with the digital world at their fingertips

There has been a significant increase in both smartphone and tablet ownership in the last four years. In 2019, the vast majority of kids and teens now own a smartphone.

Smartphone and tablet ownership:

Total (8-19 year olds)

TGI 2019 reports slightly lower smartphone and tablet ownership among all UK adults, at 86% and 58% respectively



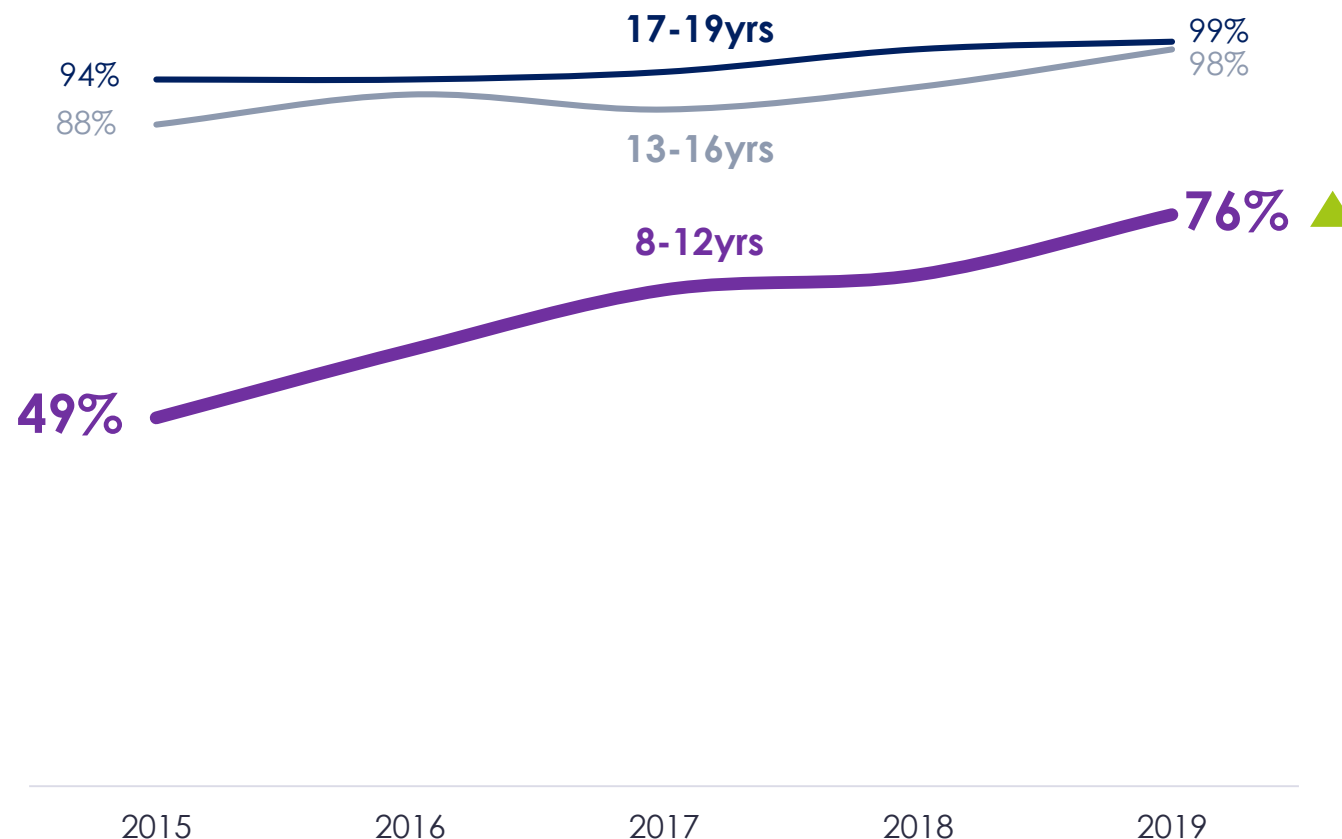
▲ Significantly higher vs. 2015 at 95% CI

With pre-teen ownership of smartphones rising rapidly

While ownership of smartphones among 13+ year olds has been universal across the past four years, ownership among 8-12 year olds has quickly increased (by over 50%).

Smartphone ownership:

[Split by age groups]



▲ Significantly higher vs. 2015 at 95% CI

And smart home devices are allowing even more ways to connect

The number of households owning smart speakers has significantly risen since 2019. As such, there are now even more ways for kids and teens to engage and be engaged with.

Smart speakers in UK households:

Total (2,000 internet users aged 16+)

Among kids and teens who have access to smart speakers, the proportion of those using these **multiple times a day** has increased from 26% to 30% since 2018.



Source: **Mintel** - The Connected Home - UK - June 2019

Q9 – On average, how often do you personally use the voice activated device in your home?
Base: All 8-19 year olds with a smart home device (665)

▲ Significantly higher vs. previous year at 95% CI

All of this is changing how kids and teens experience the world

We have identified **4 key themes** within our 2019 findings.



Personalisation



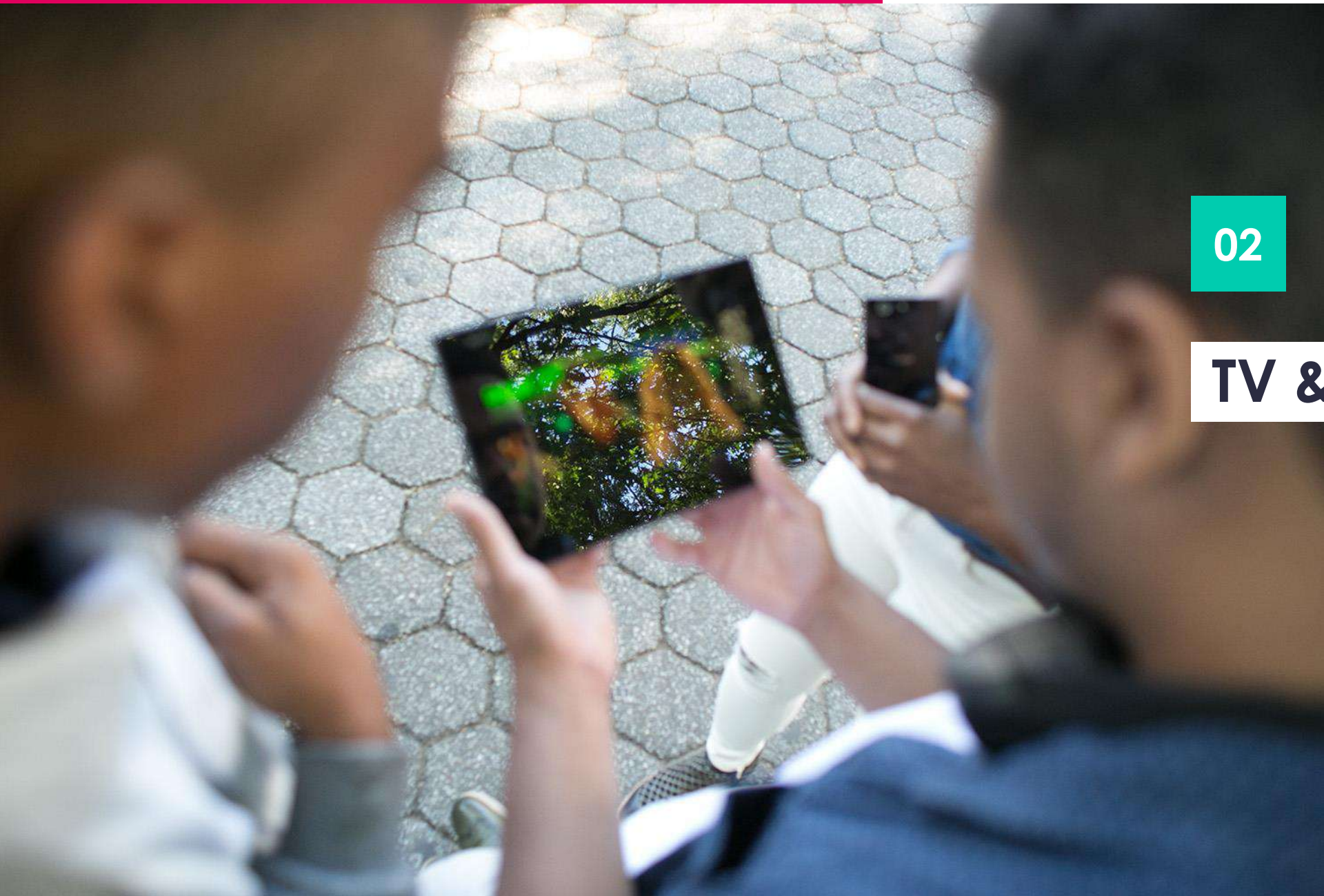
In tune



Authenticity



Changing identity



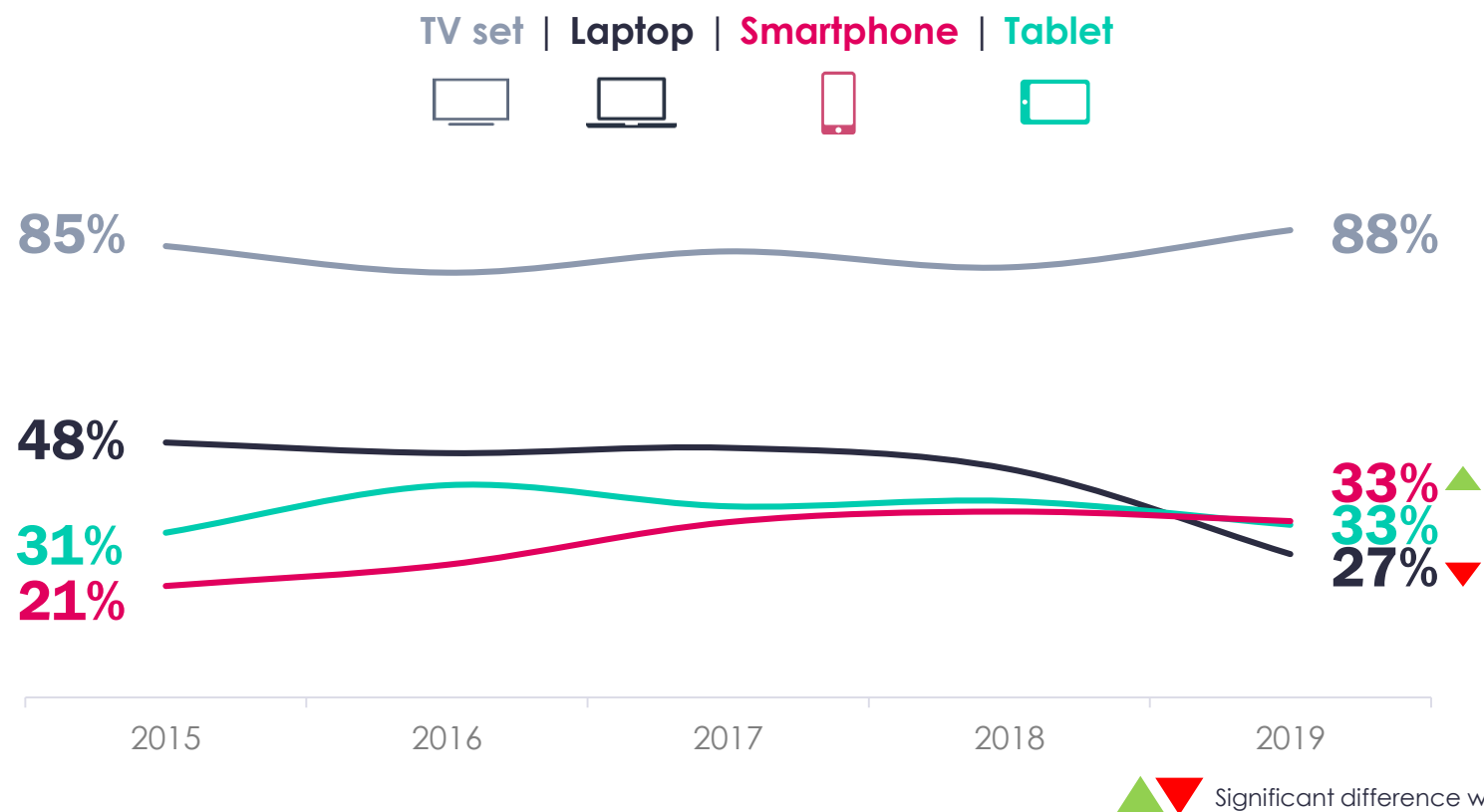
02

TV & Video

The smartphone is increasingly used for interacting with TV and video content

Devices used to regularly watch TV/films:

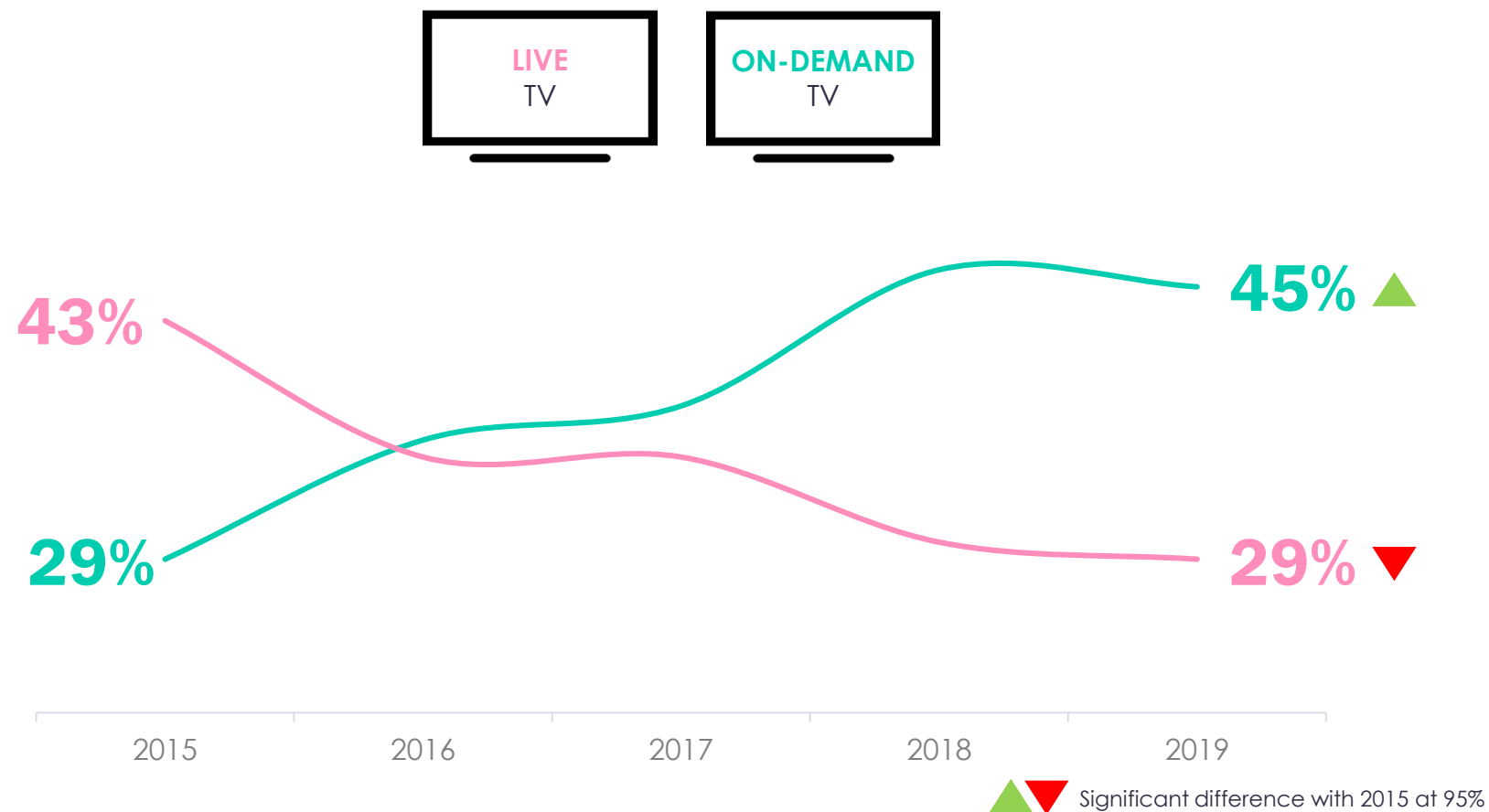
Total (8-19 year olds)



And this has allowed
more on-demand
viewing

Means of viewing TV and video content most often

Total (8-19 year olds)

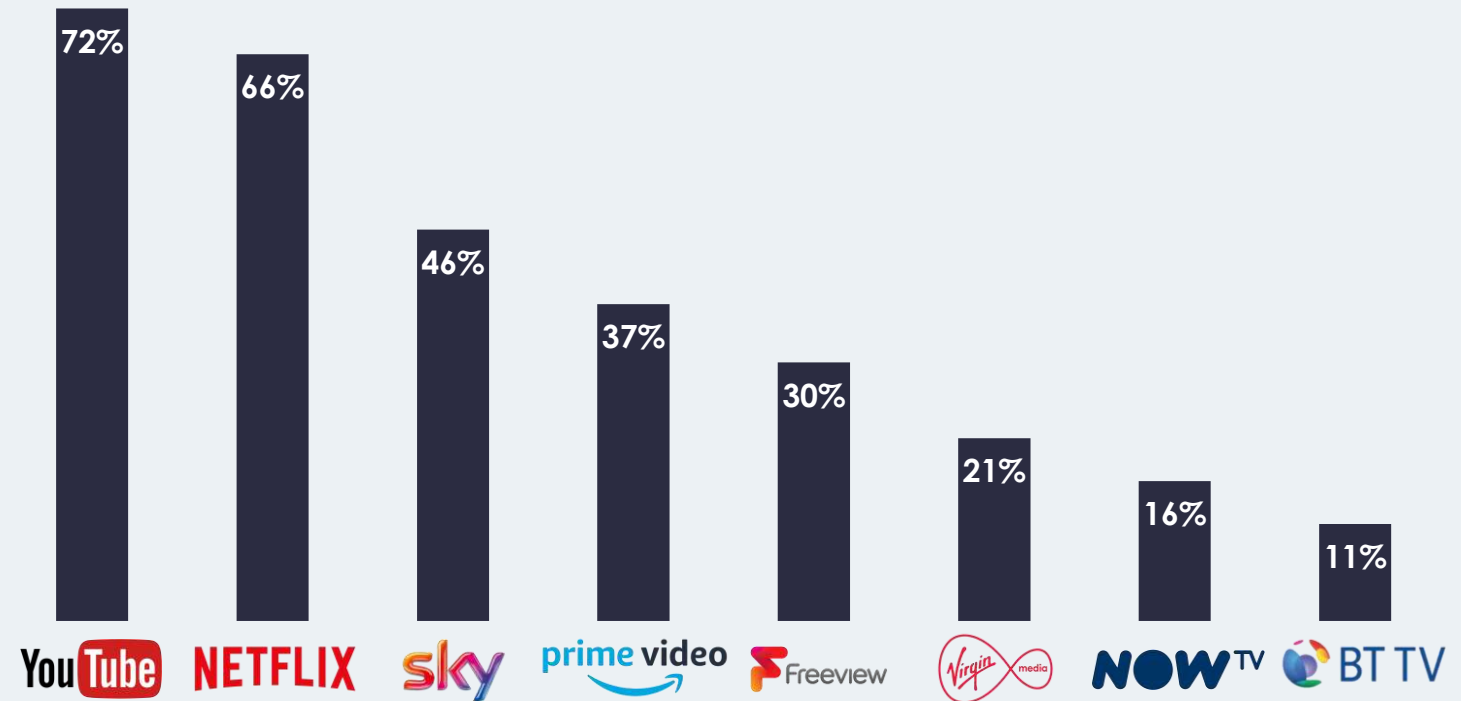




Kids and teens have a wealth of TV and video content at their fingertips

Access to TV and video services at home

Total (8-19 year olds)



With content platforms playing different roles..



Netflix – ‘Indulge’

Allows moments of ‘me time’ to indulge with their favourite shows, with teens trusting these services to guide their content section



YouTube – ‘Do’ & ‘Distract’

Is an authentic ‘teen space’ allowing endless distraction as well as practical content for learning and experimenting, with content catering to their mood and specific interests



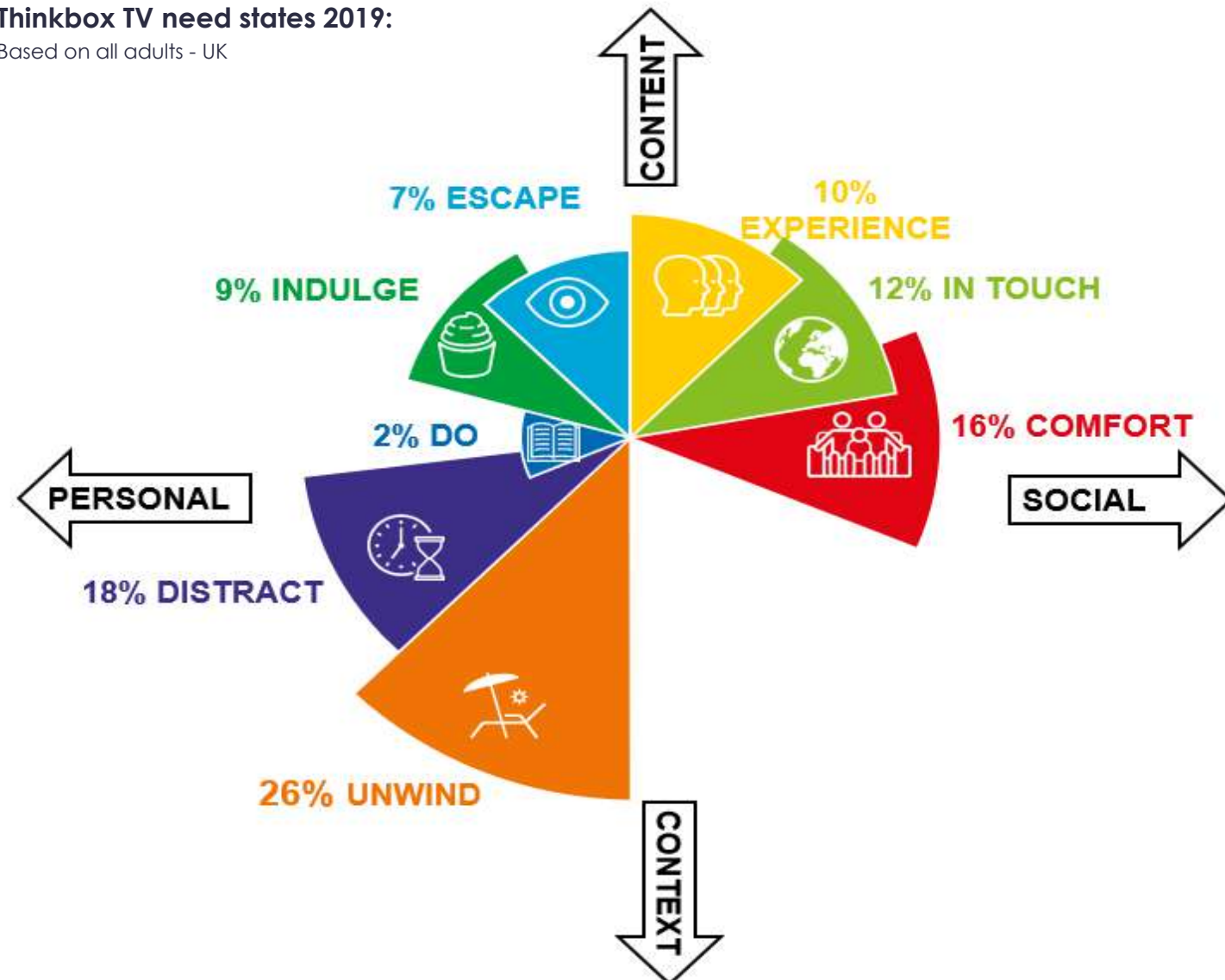
Live TV – ‘In Touch’ & ‘Unwind’

Provides a connection with the mainstream, with content choices fueled by FOMO, as well as a desire for easy viewing

These roles are reflective of Thinkbox's TV need states framework

- Thinkbox's 'The Age of Television' study observed eight need states, which define TV and video viewing habits.
- In 2019, **two new need states 'do' and 'distract'** were uncovered, which have been driven by the increasing importance of online video. When audiences desire practical information, or a source of distraction, they are most likely to turn to online platforms such as YouTube.
- With teens being more frequent users of YouTube, these are important need states for brands to understand when considering how to engage.

Thinkbox TV need states 2019:
Based on all adults - UK



Kids and teens turn to Netflix for their 'me-time' at the end of the day

- Netflix is the most used platform for watching TV and films, with usage increasing in line with age.
- Netflix represents their 'me time', a source of relaxation and indulgence at the end of the day. It's about watching what they want, where they want, and how they want. As kids and teens are more likely to be viewing Netflix alone, they have more control over how they spend this time.

40% of kids & teens use Netflix the most to watch TV/films



“““

I usually watch Netflix **before I go to bed around 9/10pm to relax me**. I mainly watch Stranger Things, comedy films or documentaries.

Girl, 17, West Midlands

“““

I'll usually watch **Netflix later at night** when I've gotten into bed and will watch some programmes before I go to sleep. I'm most likely to watch either Brooklyn Nine-nine...

Boy, 19 Wales

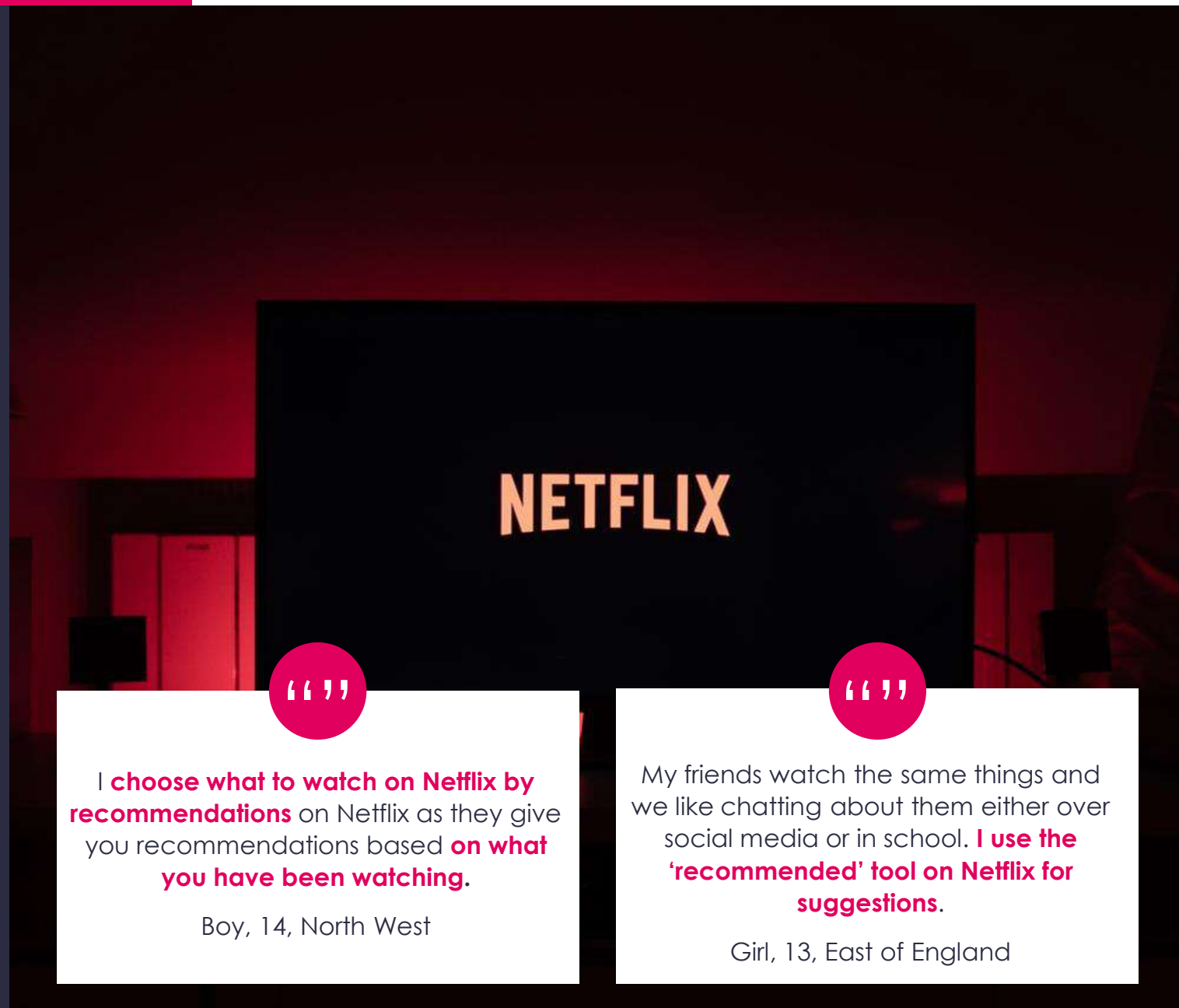
“““

I tend to watch this [Netflix] to **chill out before bed**. I'm in my room, lights off and the TV on. I love Stranger Things, Riverdale and Society.

Girl, 13, East of England

Recommendations driven by the algorithm offer clear appeal

- Hosting such breadth of content, Netflix provides opportunities for kids and teens to discover (or rediscover) shows that are personalised to their particular tastes.
- Kids and teens appear willing to trust the algorithm and watch what Netflix recommends to them. They feel that the algorithm has made navigating the wealth of content easy, meaning that they can quickly find a show that has been 'uniquely' picked for them and will fulfil their needs.



I **choose what to watch on Netflix by recommendations** on Netflix as they give you recommendations based **on what you have been watching.**

Boy, 14, North West

My friends watch the same things and we like chatting about them either over social media or in school. **I use the 'recommended' tool on Netflix for suggestions.**

Girl, 13, East of England

And data driven personalisation is something that teens not only welcome, but expect

16-18 year olds are **twice as likely to trust algorithms** to select stories compared to human editors

Edelman Trust Barometer - 2017

Industry sources demonstrate how personalisation, beyond Netflix, is particularly important to younger audiences.

Foresight Factory's 'The Me Me World' trend highlights how developments in data driven personalisation are transforming consumer expectations. More bespoke services are being demanded from brands, and **appetite is particularly high among teenagers and young adults.**

Mintel's 'Make It Mine' trend report builds on this point, arguing that this generation, as digital natives, are the most used to, and therefore the least unnerved by services and advertising being personalised to them. As such, trust is higher and they are more likely to enthusiastically adopt and expect online tools that allow them to customise, looking past services that address the masses.

Discovery through YouTube content is second nature for kids and teens, providing endless exploration

Again, teens are looking for recommendations, trusting that YouTube will select the right 'content for them' based on previous behaviours.

72% of teens use YouTube daily

YouTube is definitely 'me time' as I'm alone and **watching funny videos** and **my mum doesn't have my 'teen' sense of humour**

Girl, 13, East of England

I love watching YouTube clips, usually on my own. **I start by looking at the 'recommended' section and take it from there...**

Girl, 13, East of England

I use YouTube **everyday for about 6 hours average**. When it comes to finding the types of channels I subscribe to I usually find **them on my recommended on YT**

Boy, 14, North West

Discovery can be both practical and aimless

YouTube fulfils two clear roles for kids and teens, with both allowing the discovery of their individual (or more niche) interests, tastes or hobbies.

Do

The need to find useful information that can be practically applied to any area of life. Content focuses on instructional and 'how-to' videos covering a variety of tasks

“ ”

I also enjoy watching cooking videos, especially Gordon Ramsay because he's entertaining but **you can learn a lot about how to cook from him.**

Boy, 19, Wales

“ ”

The **makeup started when I was about 11** as I saw videos on YouTube. **I watch tutorials** like James Charles, a male makeup artist, who has taught me a lot

Girl, 13, East of England

Distract

The need for instant gratification to fill time, counter boredom, lighten their mood, or provide a short break from other tasks

“ ”

I like to watch music videos and interviews of my **favourite artists and 8D audio versions of my favourite songs.** I also like watching **funny videos** if I need to have a laugh

Girl, 18, South East

“ ”

I like to watch Shane Dawson's **conspiracy theories**, Jeffree Star and James Charles **makeup reviews** and **try not to laugh challenges.**

Girl, 18, South East

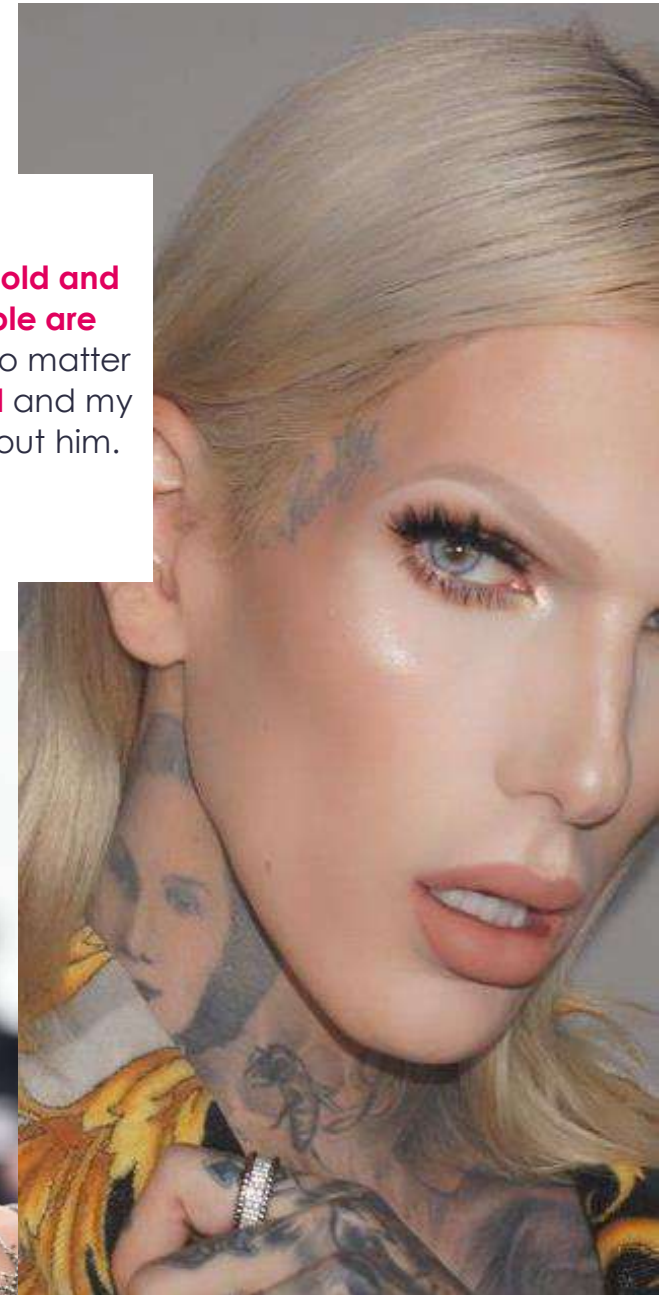
And YouTube personalities who are authentic and relatable stand out..

YouTubers who are not afraid to be themselves, or who have a point of view on the issues that kids and teens care about, can be influential.



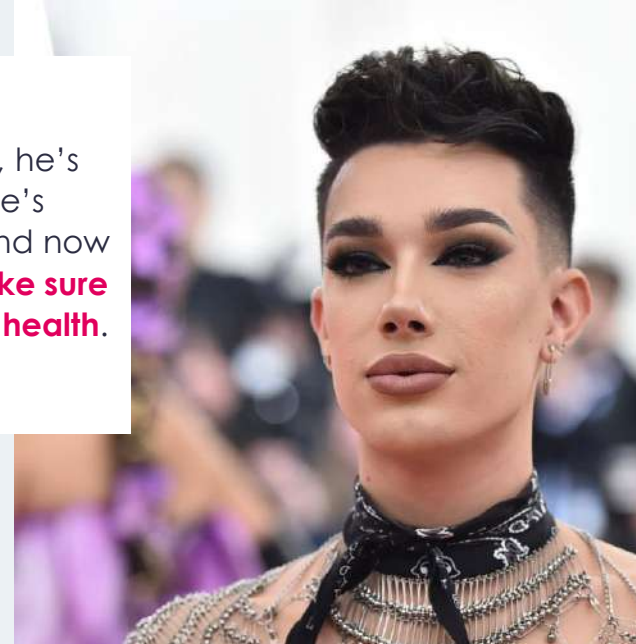
I love following Jeffree, **he is very bold and isn't afraid to say what other people are thinking**. He addresses his feelings no matter if you like it or not, **he is very original** and my social media would be boring without him.

Girl, 17, West Midlands



I follow a guy called Billy Wingrove, he's actually half of the f2fresstylers. He's struggled with mental health issues and now does **lots of inspirational things to make sure people speak out about their mental health**.

Boy, 13, South East





..presenting an opportunity for brands to get involved

Foresight Factory's 'The Celebrity Next Door' trend highlights how social media and YouTube influencers are generally seen as more relatable and trusted than big brands by younger audiences. Their advice and recommendations can have a significant impact on purchasing decisions.

However, any partnerships with YouTube personalities must feel authentic, as this audience are savvy to lazy or 'forced' attempts to engage with them.

54%

Claim to have talked about a brand that a YouTuber has posted about

Source: Connected Kids 2018 | Actions taken in response to YouTubers – All 13+ year olds (659)

42%

Claim to have purchased a brand that a Youtuber has posted about

Source: Connected Kids 2018 | Actions taken in response to YouTubers – All 13+ year olds (659)

Live TV plays a clear role, but moments to engage decrease with age



How video and TV content is viewed most often:
Total (8-19 year olds)



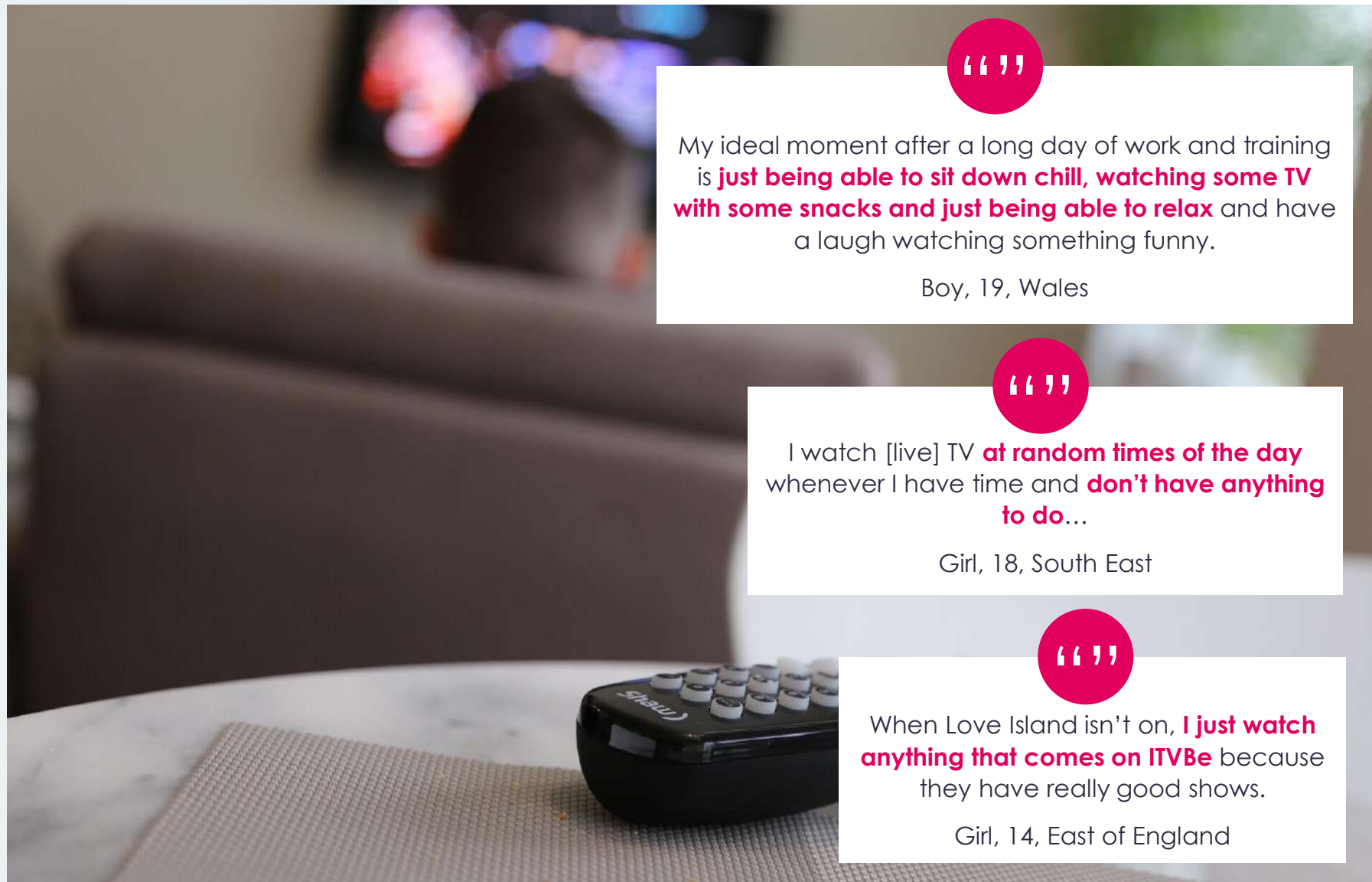
8-12 year olds 33%

13-16 year olds 31%

17-19 year olds 18%

Live TV can provide kids and teens with a shortcut to 'easy' entertainment

At times, kids and teens are just looking for easy entertainment that will help them to unwind. This can just involve sitting on the sofa and switching to channels known for their 'easy-viewing' content.



“ ”

My ideal moment after a long day of work and training is **just being able to sit down chill, watching some TV with some snacks and just being able to relax** and have a laugh watching something funny.

Boy, 19, Wales

“ ”

I watch [live] TV **at random times of the day** whenever I have time and **don't have anything to do...**

Girl, 18, South East

“ ”

When Love Island isn't on, **I just watch anything that comes on ITVBe** because they have really good shows.

Girl, 14, East of England

While on the other hand, it creates opportunities to connect

- The 'live' (right here, right now) nature of linear viewing creates a shared experience where families and friends can come together to share in the live moment.
- Live TV can stimulate a wider conversation (both in-person and online) that kids and teens want to be a part of, meaning that they make an 'appointment to view' certain programmes.
- This was particularly apparent for Love Island, as the format demanded that viewers tune in for fear of missing out and spoilers, which are often fuelled by social media...

“ ”

I watch tv in the front room with my family and in the evenings we will watch soaps such as EastEnders, Coronation street and Hollyoaks.

Girl, 18, South East

“ ”

I have to watch live TV as and when it's on, **so many spoilers appear on social media and I don't like it being ruined.**

Girl, 13, East of England

“ ”

I have been non stop **watching Love Island everyday** for the past 5 weeks on tv at 9pm **with my mum and little sister in our living room while eating a Chinese.** I like to watch love island because it **brings me, my mum and little sister closer since we're all busy throughout the day.**

Girl, 17, West Midlands

“ ”

With live TV I usually watch Hollyoaks, Love Island and the Lateish show with Mo Gilligan. I'd chose to watch something while its airing (e.g. love island) as **I'm able to actively participate with the show whether it's on Twitter or voting for the couple to save.**

Boy, 16, London

When a relevant brand 'moment' is identified, live TV can be a winner

MISSGUIDED STYLES | love island

Missguided x Love Island

In 2018, Missguided increased brand awareness, purchase intent and increased sales by embedding themselves within ITV's summer hit, Love Island.

Not only did their clothes feature within the programme, they launched their own section within the Love Island app where the viewer could buy the clothes in real time – embodying the cultural moment and becoming a key part of the conversation.

Sales rose by

40%

each night the show aired



So what does this mean?

Content created with multi-platform play in mind can effectively engage younger audiences

Finding TV moments with 'social' at the heart of the platform can offer opportunities for brands to become a part of the conversation, among a highly engaged audience.

Engagement strategy should include personalisation of interactions and offers

Growing up in a digital world means that personalisation is an expectation, not a differentiator. Brands should look to deliver 'bespoke' user experiences, with recommendations based on past behaviours offering particular appeal.

Brands should consider viewing need states by platform

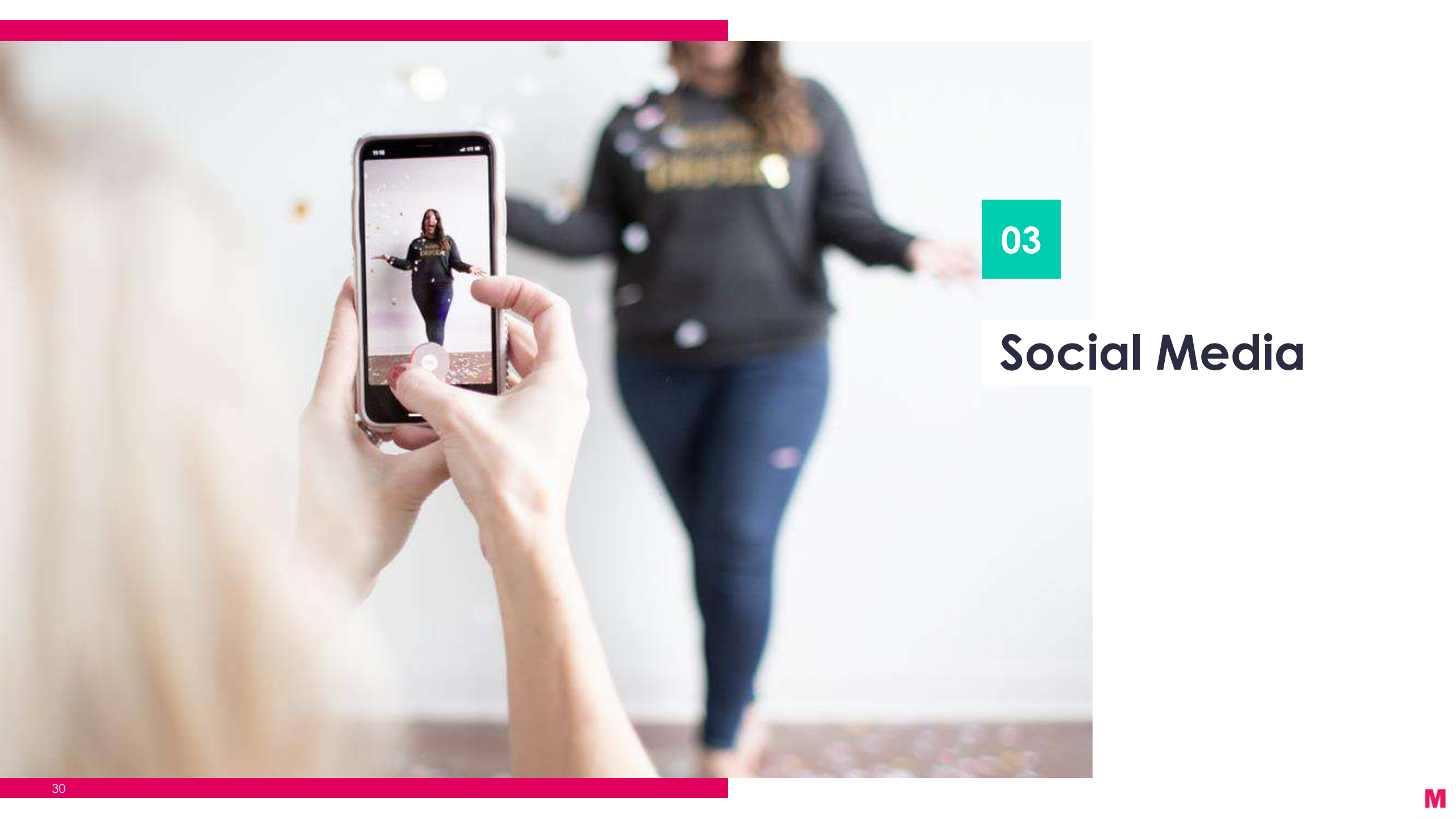
This is to ensure that TV 'moments' being bought against are relevant and that creative executions (both messaging and format) are congruent with teens' consumption mind-sets.

Authentic YouTubers are trusted and can offer brands a unique platform to engage

YouTubers are perceived to be more like 'mates' compared to celebrities. As such, endorsements can be met with positivity, as long as brands are blended into wider content that reflects the YouTuber and their life.

Partnering with Netflix content can create buzz for brands

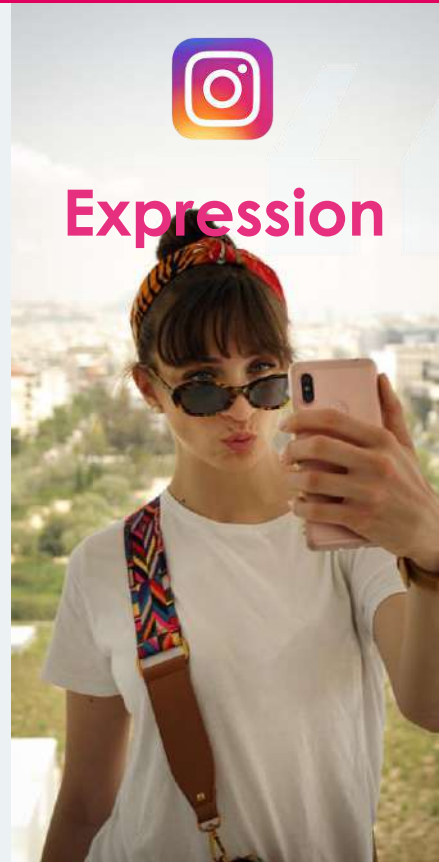
Netflix fulfils more of an emotional need state ('indulge') and new content releases can offer exciting partnership opportunities for brands to create buzz (e.g. Stranger Things X Topshop)



03

Social Media

Each social media platform plays a distinct role



Expression

Self-expression
through photos
and stories



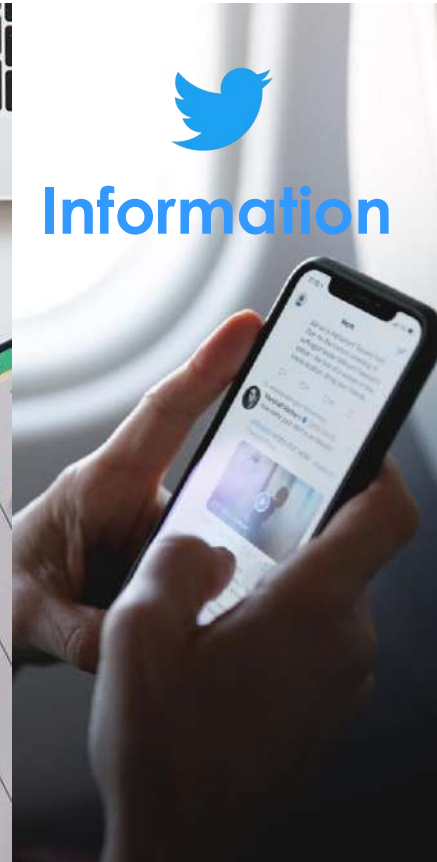
Friendships

In the moment
messaging with
friends



Family

Keeping informed
and connected
with family



Information

Being up-to-date
and on top of the
latest trends

With Instagram and Snapchat the most popular platforms among teens

Instagram and Snapchat are far more likely to be used multiple times a day compared to Facebook and Twitter.



Usage of social media channels multiple times a day:
All 13+ year olds



46%



46%



38%



20%

Social media can help teens to feel validated and included

Compared to adults, teens are much more likely to agree that social media can make them feel less lonely.

Total agreement per statement (strongly/somewhat agree):

13+ year olds

Social media helps me to avoid missing out

59%

I am on social media to feel included

47%

Social media makes me feel less lonely

45%

Vs. 36%
among all
UK adults

Social media makes me feel good about myself

40%

And social lives are shifting online

“ ”

I like how **you can meet lots of new people on social media** and that is a good thing about it **especially for people that are awkward in social situations** and these make it easier to talk to people

Boy, 19, Wales

“ ”

You can also **make new friends on social media and keep in touch**. Social media is the first place to look when you need to find someone

Girl, 18, South East

52%

Agree that “It is easier to chat to my friends on the phone than it is in real life”

Source: Connected Kids
2019 | All 13+ year olds (701)

22%

Claim to be on social media to make new friends

Source: Youth TGI 2019 | All 13+ year olds

24%

Follow/create blogs and vlogs that reflect particular interests

Source: Youth TGI 2019 | All 17-19 year olds



With social media allowing teens to present *select* moments, but to a bigger audience

“ ”

I posted that I'd just been accepted into Andrew Collinge College in Liverpool. I had made it and I felt so amazing. **People were saying such nice things back to me on the comments and I was so so happy at the time**

Girl, 17, North West

“ ”


I commented on Drake's video, and on Thursday after I got home and **went on Instagram and saw Drake had liked my comment**. I was so shocked because I didn't think he would see it, let alone like it, and **I just couldn't stop smiling**

Girl, 14, East of England

“ ”

It's a good way to show people what you are doing, so our lives are interesting like going on holiday and **posting pictures on your Instagram to show off how nice the beach is or how nice your food is**

Girl, 15, London



However, personal
downfalls and dramas
are available for all to
see

36%

Of teens claim to be worried
about negative online
comments from others

“ ”

I had an argument with a friend at school, **she posted some nasty things about me. It made me feel very sad and really upset.** It's hard to avoid a situation like that.

Girl, 15, London

“ ”

There was a situation where **one of my friends was being bullied online and it was shared publicly.** It made me feel frustrated as I couldn't do anything about it, it is on there forever

Boy, 15, North West

And teens are more likely to be feeling pressured

Compared to adults, teens are significantly more likely to be feeling pressured to portray their 'best life' on social media and be validated in return.

“““

There are so many **girls and boys who feel they have to look a certain way** due to high expectations of Instagram models and by nasty people calling other people fat

Girl, 17, West Midlands

Total agreement per statement (strongly/somewhat agree):

■ 13+ year olds ■ All UK adults 18+

I often compare myself to others I see on social media

40%

33%

I try to make my life look better on social media

36%

30%

I worry about the number of likes my posts receive

32%

24%

▲ Significantly higher vs. All UK adults at 95% CI

Q40 – To what extent do you agree or disagree with the following statements about social media?
Base: All 13+ year olds (701)

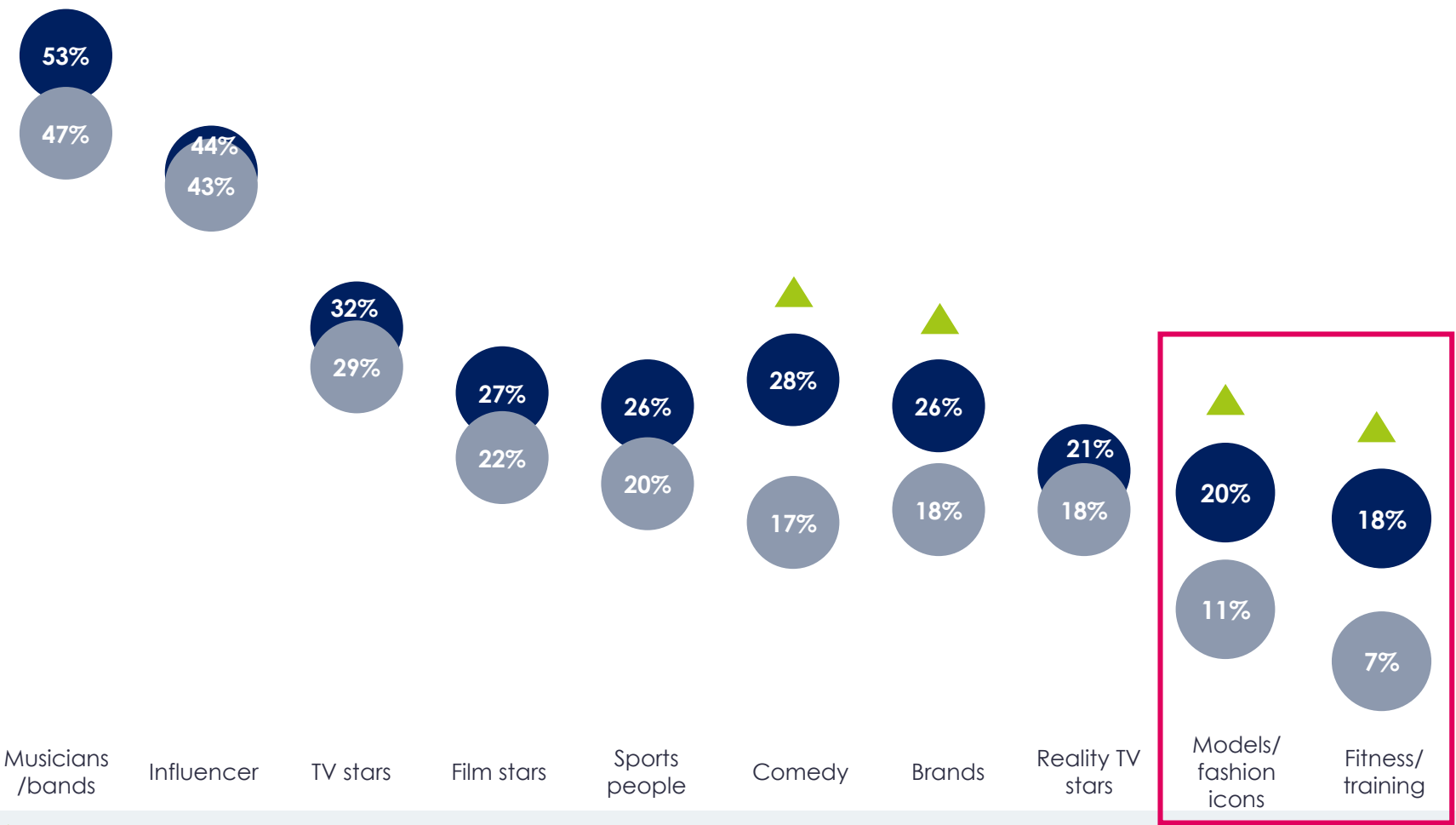
Exposure to fashion and fitness could be amplifying a comparison culture

Fashion and fitness are the most followed categories on social media. Interest in these categories becomes more apparent as teenagers become young adults.

Types of people or accounts followed on social media
(Top 10 types of people/account)

Split by age group

● 17-19 ● 13-16



▲ Significantly higher vs. 13-16 yr olds at 95% CI

Q34 - Which, if any, of the following types of people/accounts do you follow on social media?
Base: All 14+ year olds (701)

And pressure is reinforced by a constant 'distraction loop'

Compared to adults, there is an amplified feeling among teens that social media can be a drain on their time. This can reinforce the 'pressure' that they are experiencing.

Total agreement per statement
(strongly/somewhat agree):
13+ year olds

77%

Boredom

"I use social media as a way of passing time"

52%

FOMO

"I feel the need to constantly check for updates"

Vs. **43%** among all UK adults *

48%

Fatigue

"I think I spend too much time on social media"

Vs. **30%** among all UK adults *

46%

Switching off

"Social media makes it harder for me to switch off"

Vs. **36%** among all UK adults *

* Significantly higher vs. all adults at 95% CI



We know that poor mental health is on the rise among teens

Social media is driving 'hyper-connectivity', which is likely to be contributing to poorer mental health, with conditions such as anxiety and depression becoming more prevalent among young audiences in recent years.

90%

Of school leaders reported an increase in the number of students experiencing stress, anxiety or depression in 2019

35%

Increase in the number of calls received by the NSPCC from kids and teenagers experiencing anxiety

1 in 8

Children in England are living with a mental health condition, as revealed by the NHS

However, teens are starting to make some practical changes

Teens are proactively starting to adopt practical measures in response to the time they spend on social media.

Total % taking each action:
13+ year olds

18%

Removed certain social apps from their devices

17%

Limited their screen time

13%

Cut down usage of social media apps/sites



With 'Finstas' helping them to avoid judgement from others

Multiple Instagram accounts are being adopted to avoid judgement from others.

24%

Of teens have more than one Instagram account

“““

I have a Finsta, it's the best thing I've ever made! It's basically a second account on your Instagram where **you can post silly photos of you without other people judging you.** I only have close friends on my one.

Female, 17, West Midlands

“““

I think Finsta is a good thing because **people can do whatever they want without being judged** (e.g. like, post and follow whoever they want)

Girl, 14, East of England

Brands can help to address pressure and a decline in mental health

Increasing pressure and rising mental health issues underlines an opportunity for brands to engage with younger audiences about their mental well-being, helping them to establish a healthier balance between online and offline worlds.

Addressing pressure
Diet Coke – 'Put Perfect On Ice'



Highlighted the pressure of the daily battle to be the very best, and how draining it is to be constantly outdone by the 'perfect' version of yourself.

Reducing stigma
LadBible – 'U OK M8'



Encouraged young people to speak openly about mental health. Using various examples, the campaign aimed to prove that depression is not something to be ignored.

Using 'real' people
ASOS – 'ASOS Insiders'



ASOS uses 'real' young people from different corners of the globe, to provide users with more personal and relatable content around fashion, tips and style advice.

The highs and lows of social are magnified among teen girls

Our 2019 findings demonstrate more frequent usage of social media among teen girls. Teen girls are more likely to agree with statements relating to the both positive and negative effects of social media.

Higher usage



54% of teen girls use Instagram multiple times a day (vs. 38% of teen boys)

Amplified benefits



49% of teen girls agree social media makes them feel less lonely (vs. 40% of teen boys)

Intensified negatives



53% of teen girls agree social media makes it harder for them to switch off (vs. 39% of teen boys)



So what does this mean?

Social media content should be tailored to each platform

For instance, Snapchat tends to be used among select friends for messaging 'in the moment', whilst Instagram is used more for expression of curated selves. Brands should tailor their content to social media roles to improve engagement

Smaller, interest driven communities can present brands with a highly engaged audience

Social lives are continuing to shift online, which means that teens have the opportunity to find like-minded individuals and communities that reflect their particular values, hobbies and interests. Relevant micro-influencers can present brands with the opportunity to connect with teens on a more personal level.

Brands can help to reduce pressure and negativity associated with social media

Social media has become a public area to showcase highs and amplify lows. Brands can help to alleviate some of this pressure and address negative side effects by creating content that promotes self-acceptance and inclusivity, or addresses mental health.

Brands have a platform to help inspire behaviour change

While teens can be resilient and are developing their own strategies to protect themselves on social media, brands have a platform to inspire behaviour change, encouraging teens to 'switch off' and establish a healthier balance between online and offline worlds.



Music plays a key role in the lives of kids and teens

84%

agree life would be miserable without it



“ ”

I like to go up to my room and listen to slow jams, it really relaxes me and **takes all the stress away**, I put my headphones on and go into my own world

Girl, 15, London

“ ”

I will put on my UK rap playlist most of the time and sometimes I put my garage playlist and I will play out loud through my speaker because the music **motivates me**

Girl, 18, South East

And music is easier than ever to access

In 2019, a smartphone is by far the most popular way to listen to music.

Devices used to listen to music:
Total (8-19 year olds)



Smartphone



Smart speaker



Radio



Laptop



Tablet

YouTube and Spotify have enabled unlimited choice

YouTube and Spotify are the most used services for streaming music. Similar to TV/video content, kids and teens are open to 'recommendations' suggested by these services.

“ ”

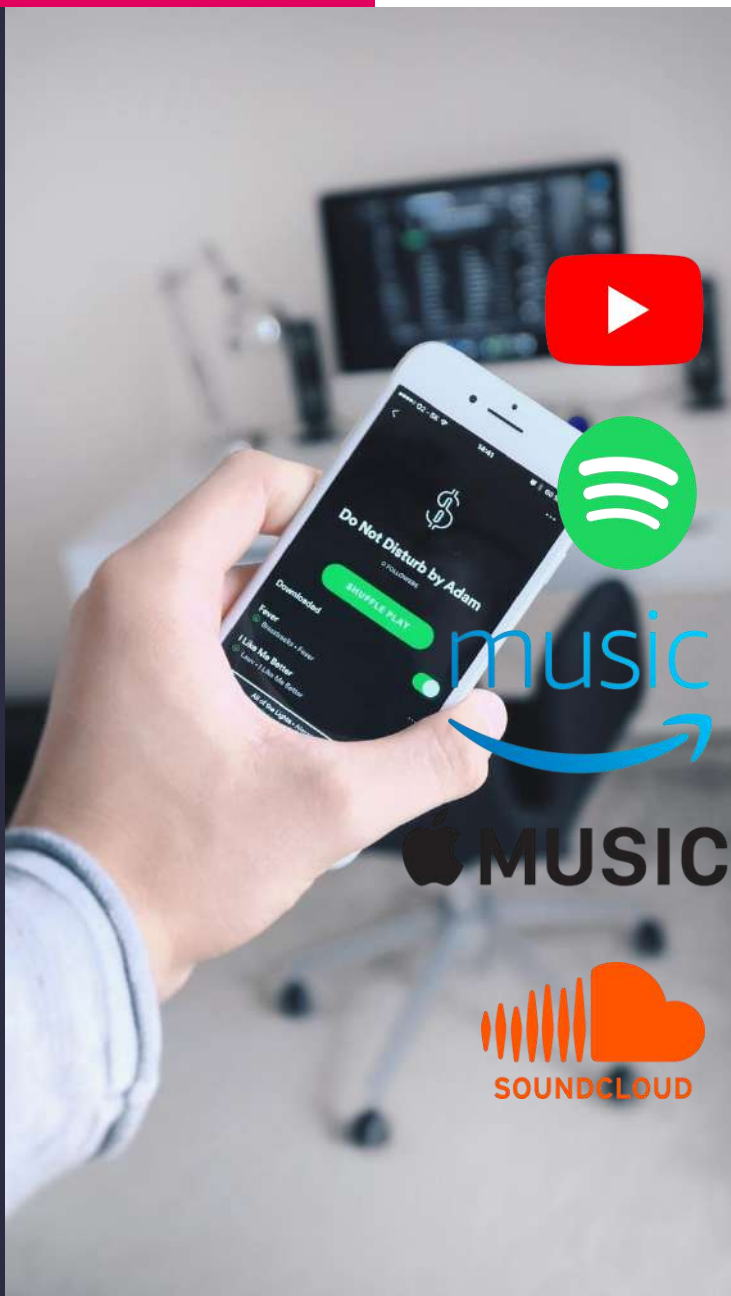
I'll **go on YouTube** to listen to music mostly...**it's convenient to jump from one song to another through recommendations**

Boy, 19, Wales

“ ”

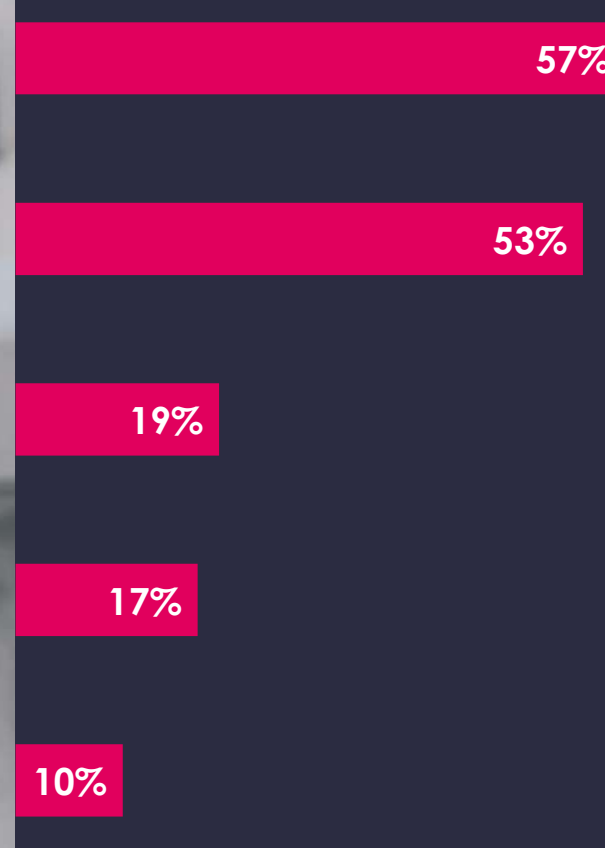
I see music videos and songs on YouTube and if they look good then I add them to my Soundcloud playlist

Boy, 16, Surrey



Top 5 streaming services used to access music:

Total (8-19 year olds)



TGI 2019 reports that 42% of adults use **Spotify** to access music



“ ”

I have a very **broad taste in music** and my **playlist is just rife with different genres and artists** from all different ages

Boy, 19, Wales

With kids and teens priding themselves on having eclectic and varied taste

- With so much choice available through streaming services, there is now less of a 'mainstream' when it comes to music. Kids and teens do not tend to limit themselves to a single genre. When prompted, over 200 artists/bands were mentioned as 'favourites', spanning across decades.
- This in contrast to a decade ago, whereby our 2009 youth research demonstrated how favourite artists largely fell under the 'pop' genre.

In 2019, kids and teens' favourite types of music fulfill distinct needs

While over 200 artists were been mentioned as a 'favourite', three different 'genres' were more consistently mentioned by kids and teens.



Bonding opportunities & sentiment



"Don't Let The Sun Go Down On Me'. The **lyrics tell you not to give up easily**, which I don't.

Boy, 13, South East



Empowerment & role models



I love Ariana's music because she's a feminist, **she stands up for women through her music!**

Girl, 17, North West



Mass popularity



I like listening to rap...it's the **music that all of my friends are listening to right now**

Girl, 15, London

“““

Whitney Houston, I really like some of her stuff and **it's nice because my mum knows the songs too.**

Girl, 15, East of England

“““

I also love **old school garage** because **my mum got me into it so I got into it**

Girl, 18, South East

31%

Of teens agree that they like to listen to the same music as their parents (Youth TGI 2018)

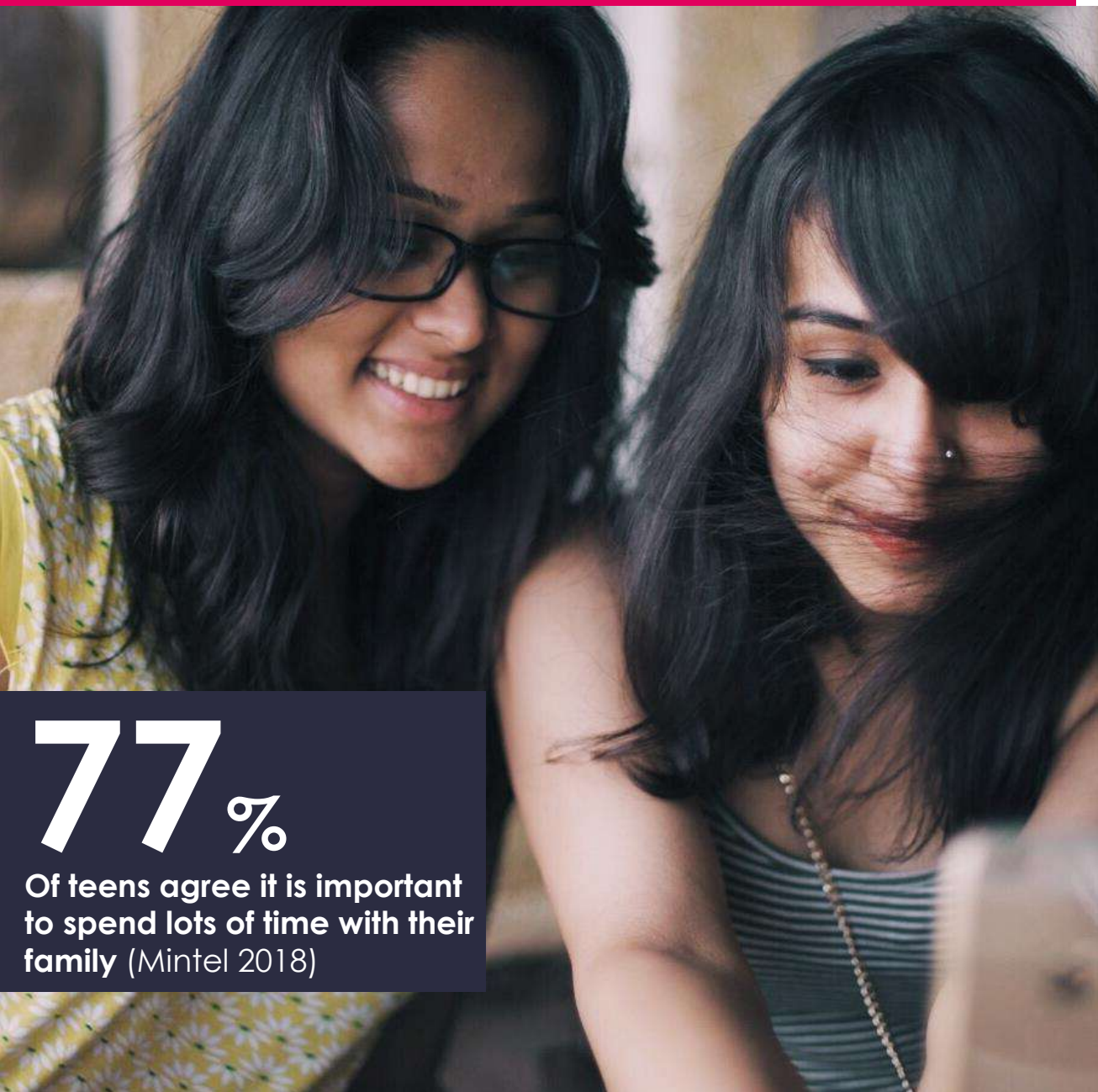
The 'classics' provide a point of connection

- Kids and teens are not just focussed on contemporary music, with many mentioning artists across different eras.
- Many of these artists are seen to offer a point of connection with their parents, or to contain lyrics that they feel are personal to them. However, these songs are less 'shareable', with kids and teens fearing a lack of approval from others.

“““

My favourite songs are Purple Rain, Rocket Man. I like these because **I have been brought up around them.**

Boy, 13, South East



77%

Of teens agree it is important to spend lots of time with their family (Mintel 2018)

With this generation likely drawing more influence from their parents

Psychology Today argues that the decision to have a child is more purposeful and less bound by societal expectations in recent years. Delayed parenthood, better educations and reduced birth rates are leading parents to increase their fixation on individual children.

They cite that modern society and the media bombards parents with conflicting advice on parenting 'styles' as well as risks, which is making it harder to raise a child unselfconsciously. As such, indoor time has increased, with families spending more time 'together'.

Mintel also argues that this generation of young people are more family orientated. Apps such as Instagram and Snapchat mean that teens are able to keep in touch with their friends 24/7, perhaps feeling less pressure to choose between spending time with family or friends.

Current female artists can empower..

Artists such as Ariana Grande, Billie Eilish and Cardi B are noted as providing a much welcomed female point of view, drawing on their own experiences to promote confidence and individuality.



“ ”

I absolutely adore Billie Eilish. Her music **touches me because she doesn't try to fit in...**she brings out the crazy side in me

Girl, 17, West Midlands

“ ”

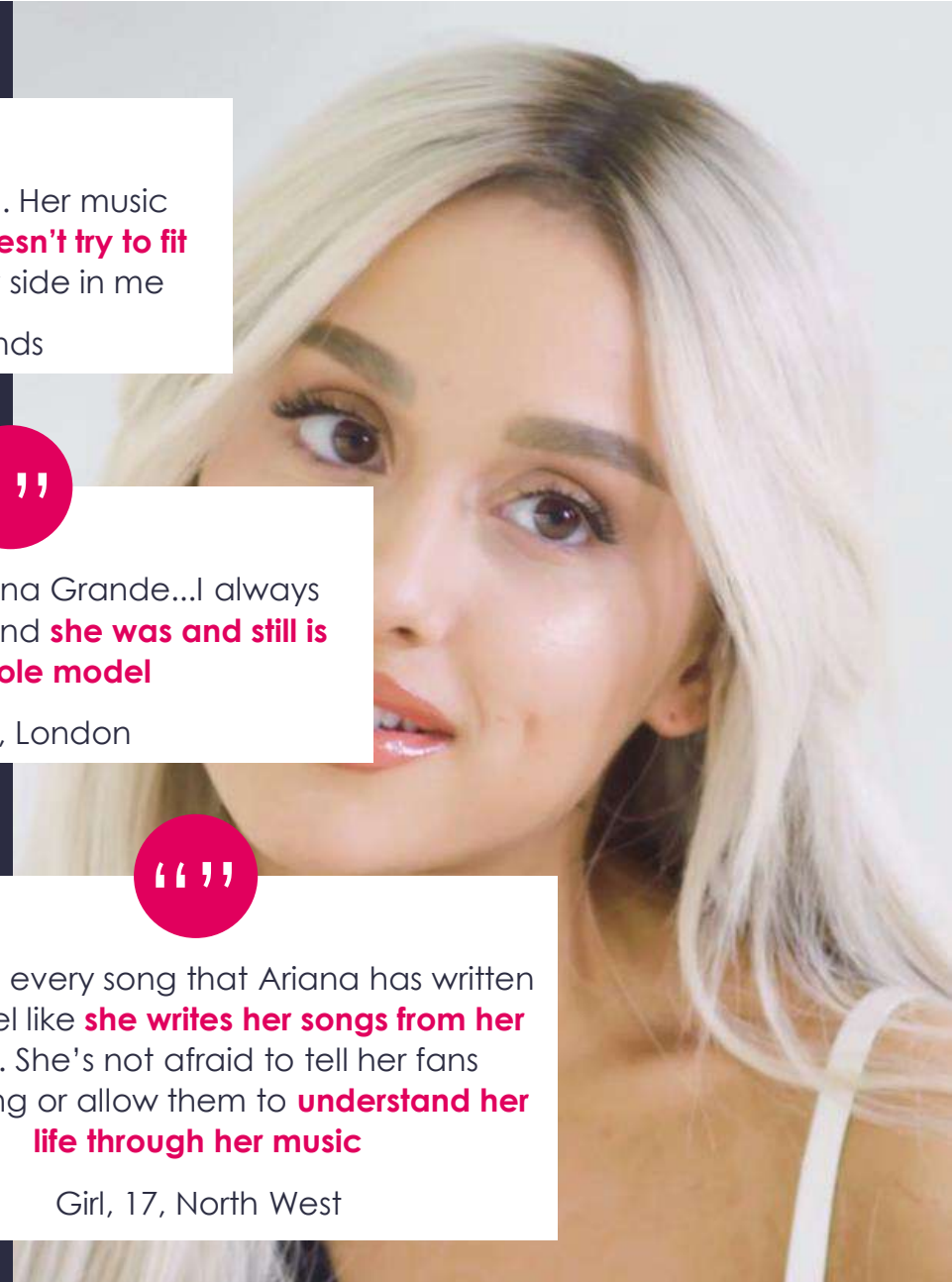
Next would be Ariana Grande...I always wanted to be her and **she was and still is such a role model**

Girl, 15, London

“ ”

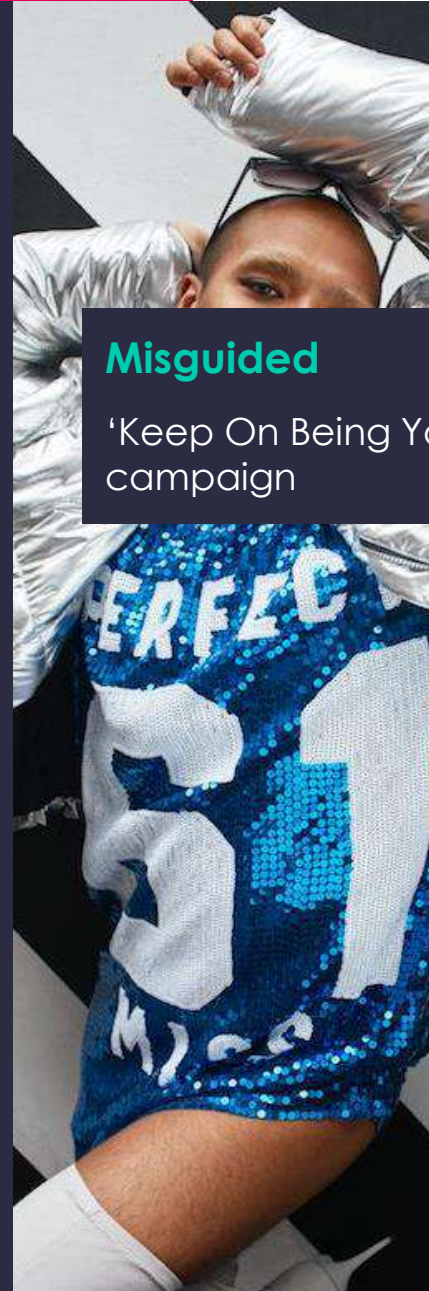
I just love every song that Ariana has written and I feel like **she writes her songs from her heart**. She's not afraid to tell her fans something or allow them to **understand her life through her music**

Girl, 17, North West



..reflecting a focus on individualism and self acceptance in popular culture

- **Mintel** reports an increasing focus on themes of individualism and self-acceptance in popular culture, with many female singers writing song lyrics that encourage listeners to embrace what makes them unique.
- A similar tone can be seen across the marketing industry, with various brands adopting messages of self-expression, individuality and diversity as a way to connect with younger audiences. Arguably, this is making kids and teens more aware of what makes them unique, with this generation more easily able to indulge their individual style, tastes and hobbies online.



Misguided

'Keep On Being You' campaign



Method

Partnership with the LGBT Foundation

UK Rap, Grime and Drill is seen as the music of the 'now'

Virtually all kids and teens mentioned at least one Rap, Grime or Drill artist that they listen to.

“ ”

The music I listen to most is; **UK rap, afro swing and drill**. My favourite artist is Dave, because he doesn't just rap about materialistic things like other rappers, **his songs have important messages in them.**

Girl, 18, South East

“ ”

I normally I listen to rap music like UK drill and American music. I like listening to OFB drill group as well as some American rappers like **Roddy Ricch, NBA YoungBoy and NLE Choppa**

Boy, 16, South East

“ ”

The type of music I listen to most is UK rap, There are a lot of great artists that I listen to daily, but **my favourite artist has got to be Dave**; he is really talented and makes songs with emotion that talk about real life issues. **He doesn't just rap about money/girls like a lot of the others**

Girl, 18, South East

And artists who offer a point of view stand-out

With increasing connectivity, kids and teens are now so exposed to wider societal issues. As such, a clear appeal of rap and other contemporary artists is the relevancy of their lyrics, which are in tune with the areas that are weighing on the minds of kids and teens.



“

I absolutely adore Billie Eilish. She speaks a lot on **mental health** through her music.

Girl, 17, West Midlands



“

Ariana made specific songs about the **attack in Manchester**, which I think was so respectful. She's not afraid to talk to her fans

Girl, 17, North West



“

My favourite song from Dave is 'Hangman', it's about the issues surrounding **gangs and youth**, sending an important message

Girl, 18, South East

Kids and teens engage with music beyond the headphones

“““

My favourite music channel on YouTube is 'Grime Daily Media – GRM'. They upload UK rap videos and they are the best because **they post very often and keep you updated with new tracks.** They also **have fun videos and interviews** involving different artists

Girl, 18, South East

“““

I love following Ariana Grande on Instagram. I look at her posts from concerts or what she gets up to. I love doing this because **she's such an inspiration to me so I always like to know where's she's at**

Girl, 17, North West

Actions taken to keep up to date – 17-19 year olds:

Follow favourite artists on Instagram

39%

Subscribe to their YouTube channels

31%

Watch artists live at gigs or concerts

29%

Watch artists live at festivals

22%

With music creating a clear talking point among this audience

Total agreeing with each statement (strongly/somewhat agree):
Total (8-19 year olds)



61%

"I always talk to my friends about music"

55%

"I regularly share new music with my friends"

50%

"I discover new music through word of mouth"



So what does this mean?

It is important for brands to understand how values play out in teens' identities

Music has become more of a 'solo' indulgence rather than an outward expression. This highlights a need for brands to understand how the 'values' associated with different types of music can shape identity, with less of a music 'mainstream' in 2019.

Musical tastes reflect the wider importance of authenticity to this audience..

Societal issues feature heavily in the music kids and teens listen to, with teens expressing a preference for artists who speak 'truths'. Brands should consider adopting a similar approach to building relevance with this audience.

...as well as self-acceptance and individuality

Individuality and self-acceptance are recurring themes in music and wider popular culture. With pressure to present a 'perfect' self, brands can adopt a similar approach to encourage teens to embrace what makes them unique.

Sponsored playlists can help teens to curate music

With unlimited music available, paired with an expectation for personalisation, there are opportunities for brands to connect with teens by creating sponsored playlists to 'fit' different moods or anticipated content (e.g. Sky GOT X Spotify partnership)

Teen music consumption points to a broader shift in parent-child relationships

The family bond found in music represents a bigger change in parent-child relationships. Brands that tap into shared family moments could create talking points in the home.



05

Attitudes towards the future

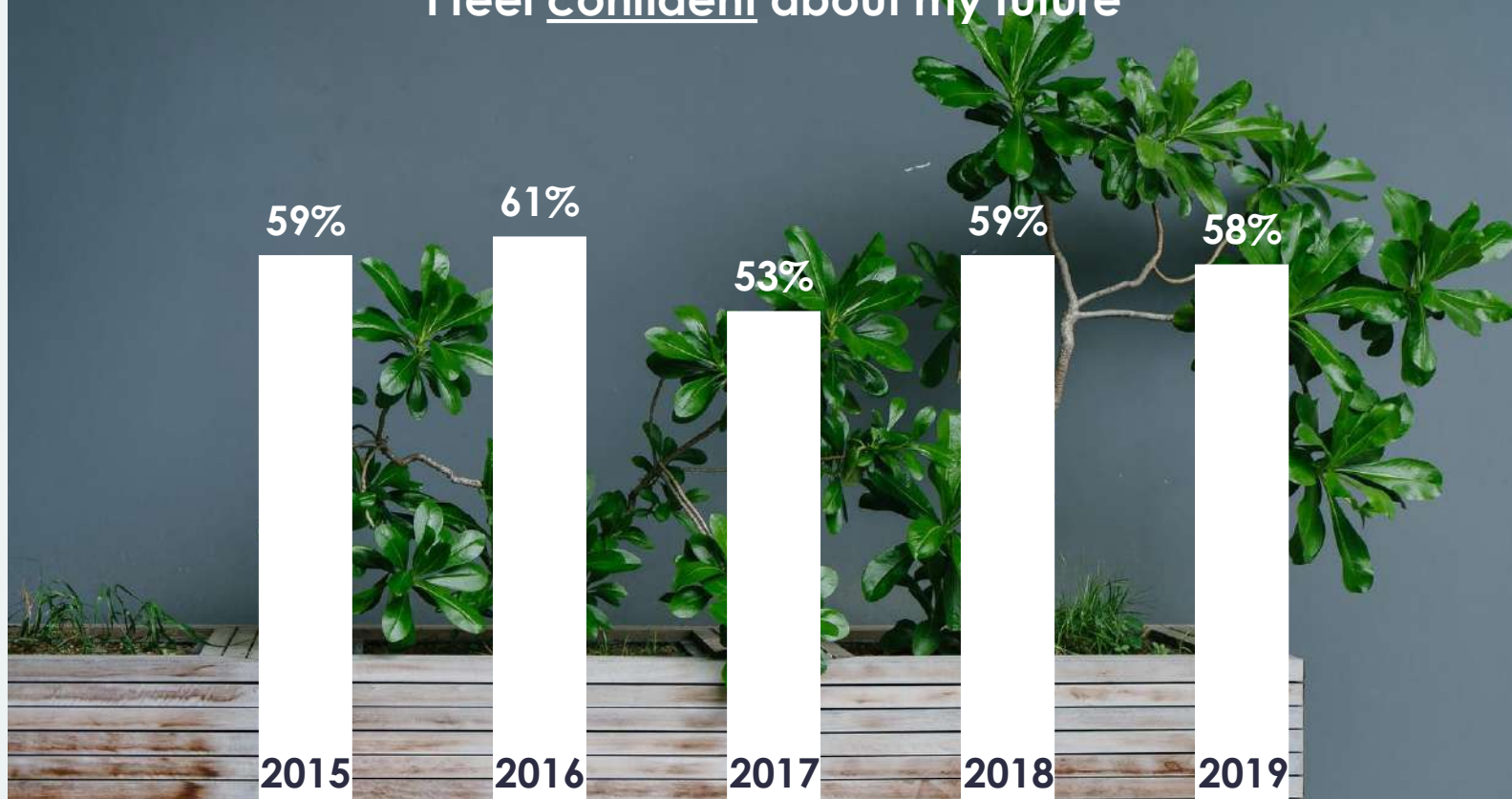
Teens are resilient and confidence has picked up since 2017

“ ”

The things I'm most optimistic about in the future is hopefully getting into **the career I want**, which is border force. I'm also looking forward into investing money into **eventually buying a house**, as it is something I've always wanted to do. I'm looking forward to getting **married one day and starting a family**.

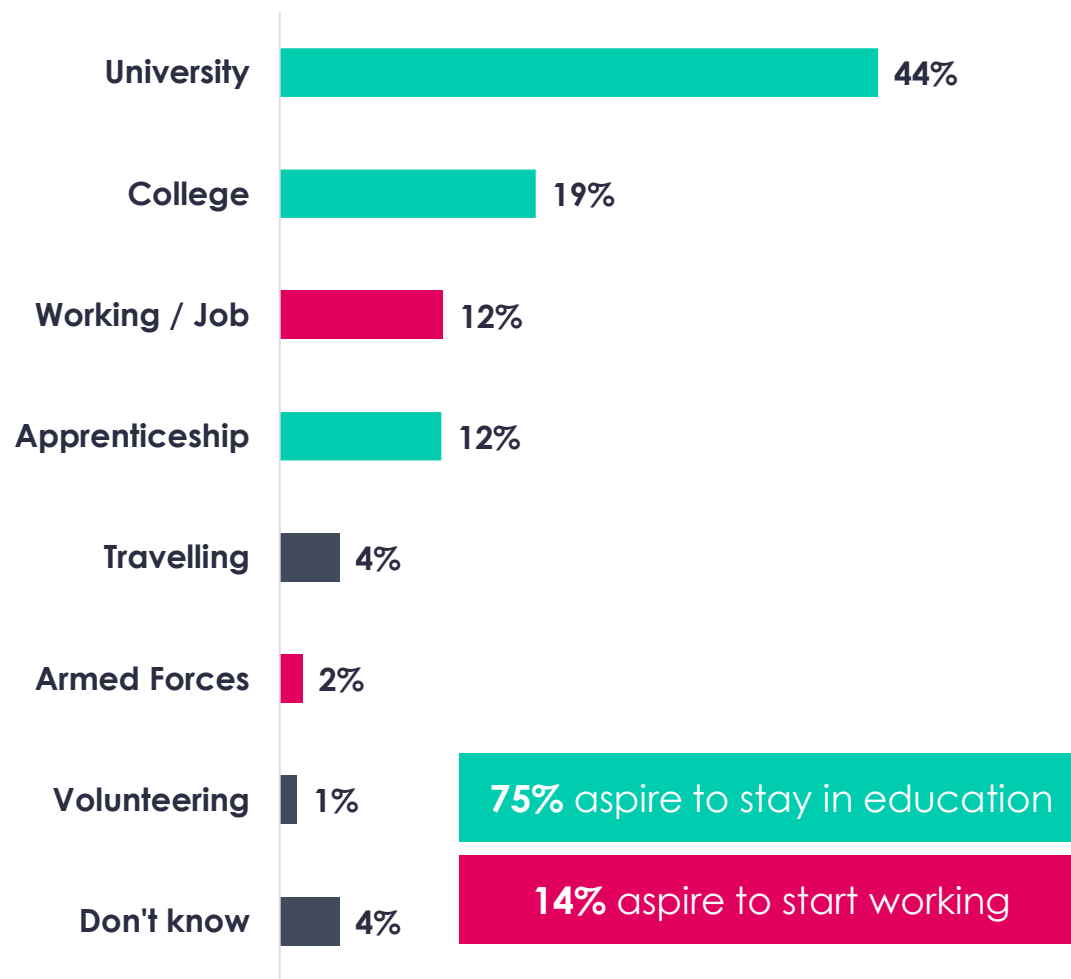
Girl, 18, South East

% agreement with..
I feel confident about my future



Q45. Please tell us how much you agree or disagree with the following statements? **Base:** 13-19 year olds (701)

Aspirations after school: All teens aged 13-19



They are ambitious, with many aspiring towards more traditional careers

Top 5 Career Aspirations:



Medical



Computer / Programming



Engineering



Animals



Teaching

But teens are realistic, acknowledging that they will need to work hard to achieve their goals

“ ”

I feel like I have a good chance with getting the job or career that I want in the future. I really enjoy studying that sort of thing and **I also have a few connections within the field.** If I don't pass my university course that might stop me from becoming a physio so **I'll have to work hard in uni** and pass all my exams.

Boy, 19, Wales

“ ”

I'm planning on **becoming a midwife** in Australia... the main things that could stop this from happening are not getting the right qualifications in my school so **I have to work hard, focus and get my head down**

Girl, 15, London

“ ”

I have very optimistic about my future job, I want to go to university to get my childcare degree. **But it is scary because of the grades I need to achieve to get in.**

Girl, 18, South East

However, there is some scepticism clouding their future

Teens are clued up on what is going on in the world around them, which could be driving this scepticism.

“ ”

I think my generation are more **aware of climate change, showing our feelings, discussing taboo subjects like mental health.** We aren't the **snowflake generation**, we are the generation with the guts to talk.

Girl, 13, South West

% agreement with..
I feel confident about my future

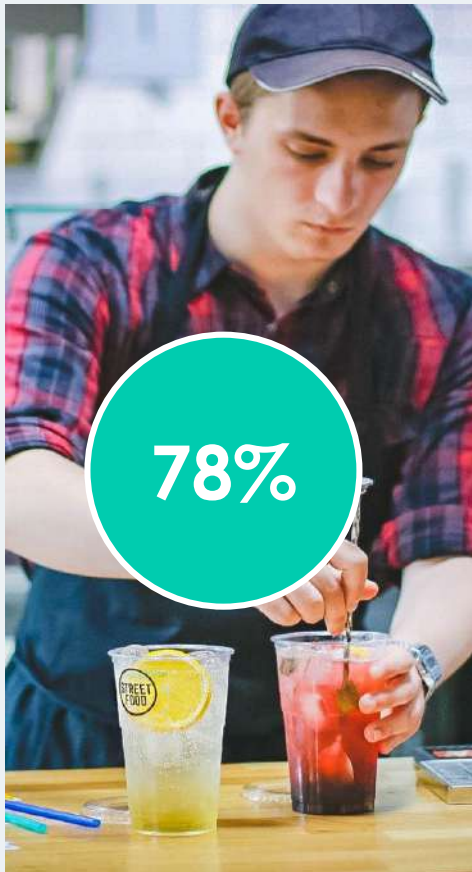


And with heightened knowledge, there is clear concern..

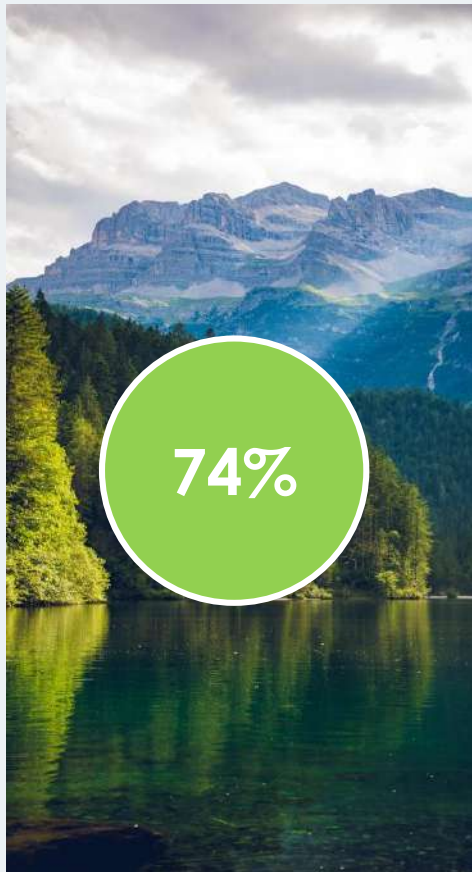
Concerned (very / somewhat) with...
Among teens aged 13-19



Public safety



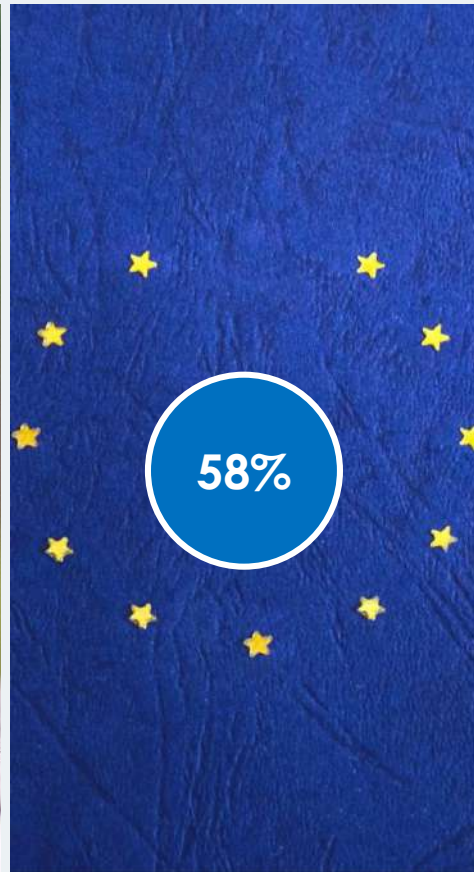
Employment



Environment



Mental Health



Brexit

With many of these concerns outside of teens' control...

Lower control

Higher control



Crime



I don't like all the knife crime. It seems that people are **being stabbed all the time** and **it's scary**.

Girl, 13, East of England



Brexit



Brexit is a complete joke that was **voted for by people who won't even be around...**

Girl, 17, West Midlands



Environment



I want to see **a lot more done for Mother Nature**, like the plastic thrown in the sea...

Girl 15, London



Mental Health



I think **it's very important because so many people are affected** and it can effect everyone...

Boy, 19, Wales



Employment



Our **future is down to us**. If we focus on school work and our futures, we'll succeed.

Boy, 13, South East

Knife crime weighs heavy on their mind...

- Knife crime is a burning issue for teens, with media constantly highlighting that more and more of their peers are becoming victims of knife crime.
- And even if knife crime isn't as apparent in their schools / neighbourhoods, the topic features in the music we know that they listen to and the social feeds they are exposed to.

“ ”

Young boys are dying because of these **silly videos on YouTube** ... it is just making **our world 100 times worse** some of these prime ministers need to take a closer look too

Girl, 15, London

“ ”

I worry about crime rates going up, because it seems to be getting worse every year, and by this I mostly mean knife crime. **I feel like everyday I look in the news and see another stabbing...**

Girl, 18, South East

Knife attacks on teenagers up by 93% in five years, figures show

Teenager stabbed in machete attack as he tried to break up fight on Alum Rock Road

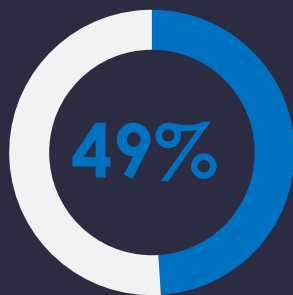
Tottenham stabbing: Four arrested after teenager left in critical condition by knife attack

London bloodbath: Teenage boy found stabbed to death after brutal attack in Stratford

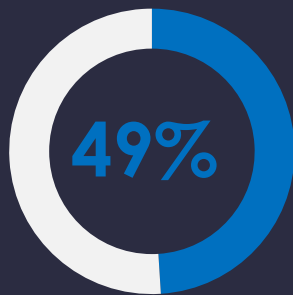
Police targeting drill music videos in controversial crackdown on social media that 'incites violence'

With Brexit an on-going unknown entity, which they are pushing to the back of their minds

Agreement (strongly / slightly)
among teens aged 13- 19:



I don't really understand what
'Brexit' means **for the UK**



I don't really understand what
'Brexit' means **for me**

“ ”

I wish Brexit would **hurry up and be sorted**.
It gets kind of **boring** now hearing about it
as it's gone on for so long.

Girl, 13, East of England

“ ”

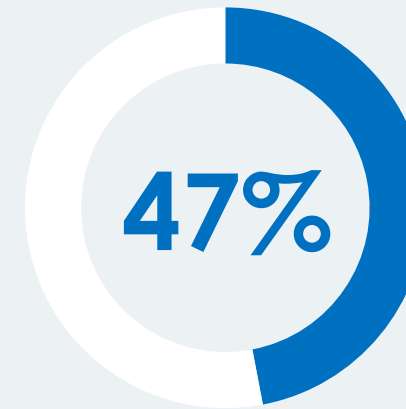
I don't have a lot of views on Brexit. I'm not
very educated on the subject... but whatever
the outcome of it I will just get on with my life.
**There isn't really a lot we can do about it once
it's been decided**

Boy, 19, Wales



However, clearer concern exists around the impact of Brexit on future careers

Agreement (strongly / slightly)
among teens aged 13-19:

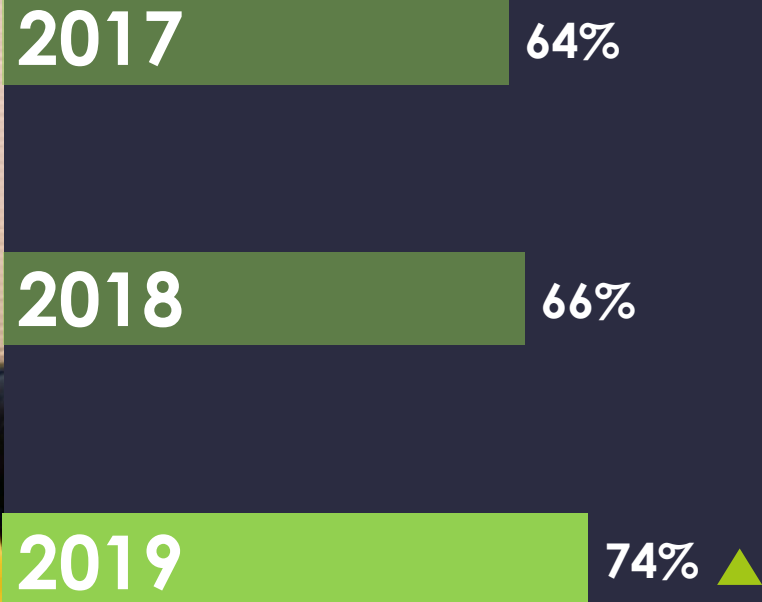


Brexit makes me worried
about my future career



Concern for the environment has increased significantly over the last year...

Concern (somewhat / very) about the environment - among teens aged 13-19



▲ Significantly higher vs. 2018 at 95% CI

2019 Environmental Events

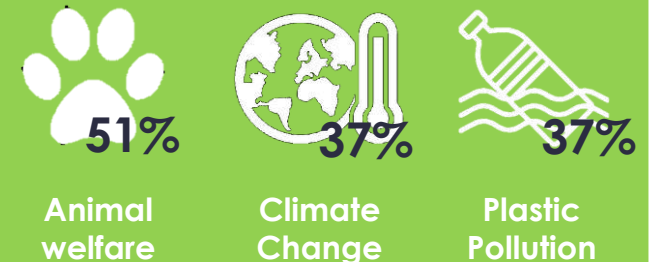
Plastic Straw Ban Movement

David Attenborough's 'Our Planet' Netflix Series

Youth Strike 4 Climate

Extinction Rebellion Protests

Mintel found that the most important environmental issues to teens are...



“ ”

At the moment I think our environment is **unsafe for animals especially in the sea because of how much plastic and rubbish** people throw on the beach and in the sea.

Boy, 13, South East



And teens are anxious
that more is done...

“ ”

Climate change is becoming a massive problem. **I feel we aren't doing enough to save the human extinction...** I recycle and use a metal straw and use a less paper as possible to minimise deforestation.

Girl, 13, South West

“ ”

The impacts of climate change are already responsible for killing an estimated 315,000 people every year and damaging ecosystems. This is important as **climate change may possibly wipe out the human population in years to come**

Girl, 13, East of England

“ ”

I think plastic in the oceans is a massive issue and **we should come together as a planet and do something together to eradicate this problem and save our sea life from extinction.**

Boy, 14, North West

Mental health isn't a stigma for this generation

“ ”

I think a lot more people are talking about mental health nowadays more than before as **there are more helplines available** and you see a lot of things in the **media encouraging people to speak up if they are struggling.**

Girl, 19, South East

“ ”

I think I'm this day and age were definitely more aware of mental health issues. However, **we still have a lot of instances where people and hurting and nobody knows...**

Boy, 19, Wales

81%

Of teens agree that mental health is just as important as physical health (Mintel 2018)

And continuing dialogue is important to them

- With schools and the media now increasingly talking about mental health, this generation of teens have adopted a culture of openness.
- Some of the teens we spoke to also had first hand experience of dealing with mental health issues, whether it be themselves or somebody close to them, so they understand the importance of being able to discuss feelings and emotions.
- And being more aware of the issues surrounding mental health, teen worries about mental health stem from a concern for others' suffering.



“ ”

A lot of people are talking about it because my **school had a day** about it and they did **an assembly and hung up posters**... I think it's really important because if we **bring awareness to it people with mental health might start feeling more confident to open up**

Girl, 14, East of England

“ ”

Mental health is such an important thing and I think it's important that the **government take the task of making this more aware in schools and workplaces**, that everyone has emotions and sometimes your emotions can act a certain way... but we all have them

Boy, 13, South East

Brands can stimulate conversation around the issues that teens care about

Taking a stance

Lush is a brand that resonates with younger generations as they speak about social causes that young people care about. They count social activism as an important part of their brand purpose, meaning that they have never shied away from getting involved in political debates which align with their core brand values (e.g. supporting marriage equality & standing up for asylum seekers).

LUSH
FRESH HANDMADE COSMETICS

#GetTheInsideOut

Lloyds Bank created a campaign to help tackle mental health prejudice.

The creative execution provoked an open conversation by playfully exploring misconceptions about living with a non-visible disability in a game of 'Who Am I'.

Winner of Channel 4s

**Diversity in
Advertising**
Award



LLOYDS BANK

Animal-free pledge

In 2018, ASOS, the global online fashion retailer, pledged to ban mohair, cashmere and silk to align with the changing consumer attitudes towards animal welfare.

Their decision stemmed from the insight that younger people are increasingly buying more consciously and demonstrating particular engagement with animal welfare issues.

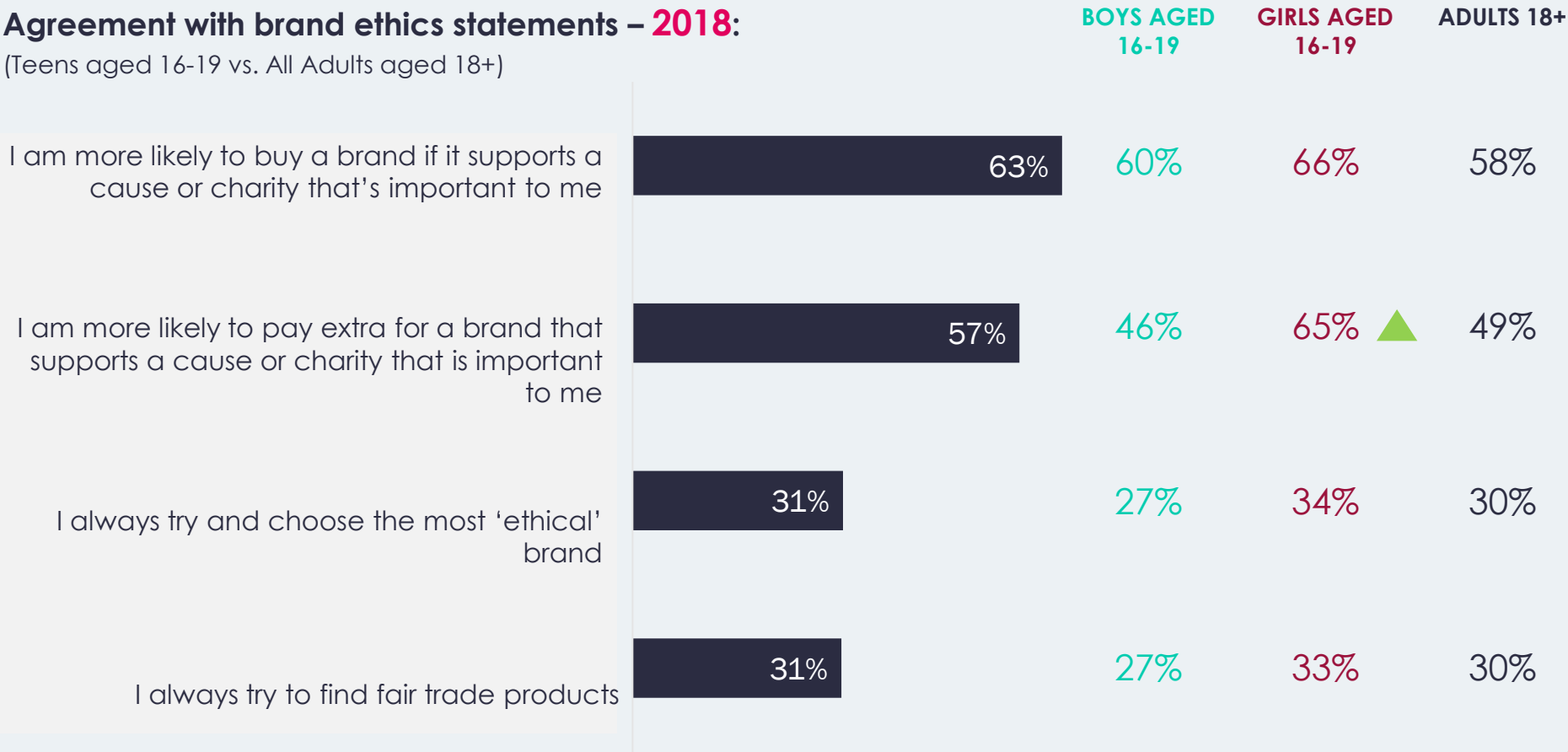
asos

With teens being more receptive to the idea of brand purpose...

In 2018 we established that teen girls are more likely to claim they would pay extra for brands that support causes or charities that are important to them, compared to all adults. This year, we have seen that having a point of view on issues is something that has clear influence on teen's content and music choices.

Agreement with brand ethics statements – 2018:

(Teens aged 16-19 vs. All Adults aged 18+)



▲ Significant increase between groups at 95%



So what does this mean?

Young people in 2019 aren't a snowflake generation

With the internet at their finger tips and cultural commentary in their ears, local and global issues are weighing more heavily teens' minds. Understanding what teens care about is important for brands, as there is a opportunity to build relevancy by embodying their values and having a point of view on the issues that are important to them.

'Purpose' can be a key differentiator for brands

From previous research we know that 'purpose' can be a key point of differentiation for brands, however this purpose needs to be authentic and embodied within a brand's identity.

Brands can offer teens reassurance about their future

Despite economic uncertainty, teens remain resilient by striving to achieve their goals, whilst acknowledging that it won't come easy. Brands can connect with teens by offering them a leg up into a career. This could be through providing apprenticeships, internships or even sponsoring vocational qualifications (for example Barclays life skills).



06

Key themes

Key themes brands should be thinking about...



Personalisation

Being digital natives, personalisation has become an online expectation, helping teens to navigate a huge wealth of choice available to indulge their individual tastes, interests and values



In tune

Increasing connectivity means that teens are clued up and hugely exposed to local and global issues. This exposure is informing their content choices and shaping their values



Authenticity

In a world of fake news and mounting pressure to be 'perfect', teens respect authenticity, with individuals who express individuality or speak their 'truths' standing out



Changing identity

Teens' identities are increasingly multi-faceted. Popular culture and unlimited 'choice' allows individuality and exploration, while social media can push teens towards a 'filtered' identity



Thank-you!

Please get in touch with any questions:

Gemma.Dunbar@mediacom.com

Leanne.Meakin@mediacom.com