



TRUSTED
BY MILLIONS
InsightsLab

KANTAR CONSULTING

THE MODERN FAMILY

THE HOME-BASING TREND

STAYING IN IS THE NEW GOING OUT

Part one in a three-part series



“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

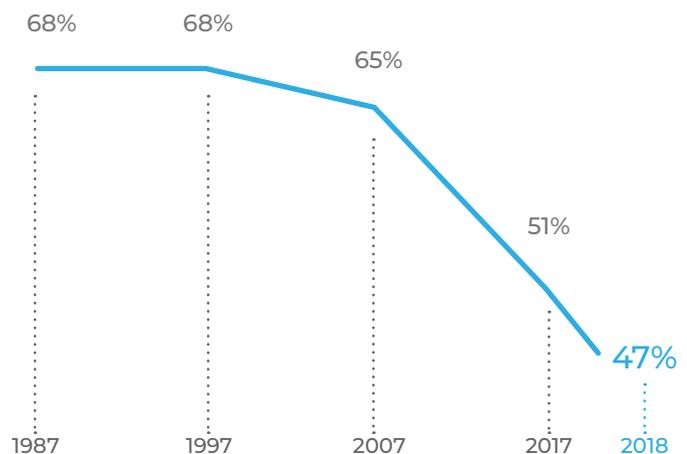
Why Study the Modern Family?

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:

- 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?

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.

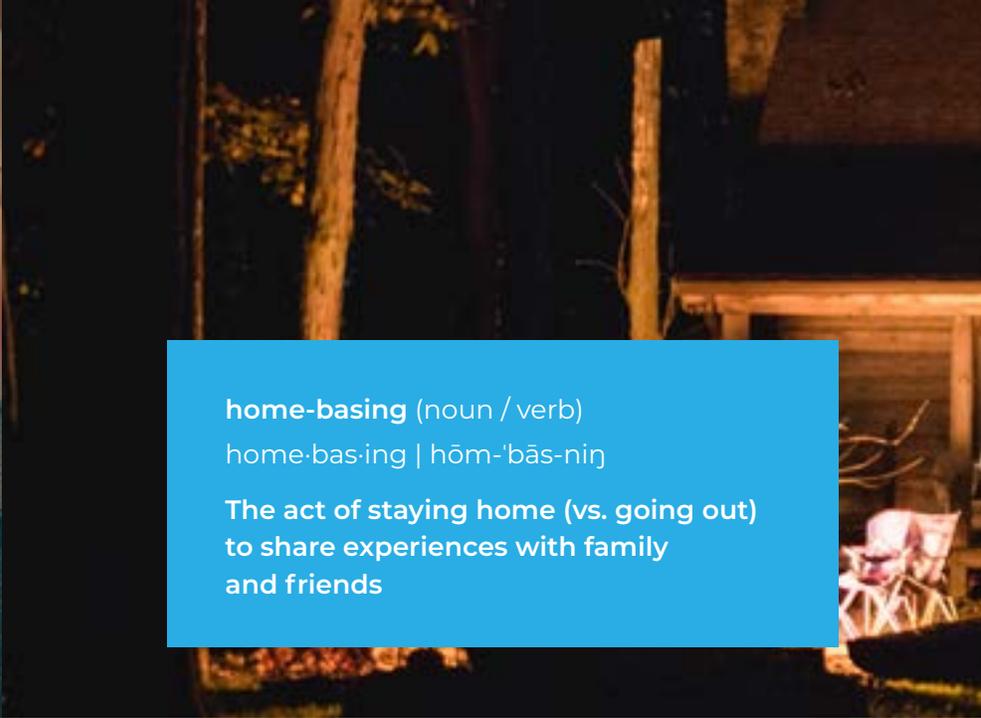
The following is the first release in a three-part series identifying three prominent trends that are shared across today's modern families:

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

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-nin

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:

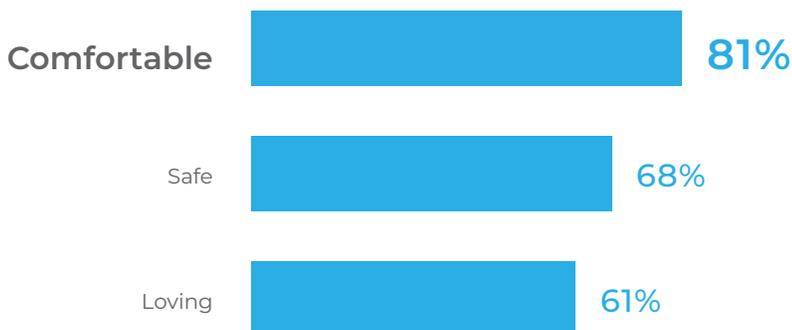


Fig 5.2

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).”



Fig 6.1

9 of 10 agree, “Eating dinner together is a priority in my family.”

2018 Trusted Media Brands Modern Family Study

“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



TRUSTED MEDIA BRANDS INSIGHTS LAB HOW SHOULD THE MARKETPLACE RESPOND TO 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, safe experiences to modern families that connect them with other family members and close confidants are set to succeed.

LEARN TO BEND
How can you adapt to meet the changing needs of the modern family?

Today's modern families are cohesive units, but they're also a collection of individuals with their own unique wants, needs and expectations. Brands that enable families to realize their self-expression needs in a more flexible, dynamic home environment will likely reap dividends in the future marketplace.

GET BACK TO BASICS
How can you connect with a more retro, analog, and "human" sensibility?

As digital tools and technology proliferate, modern families are seeking more face-to-face, collaborative, and visceral experiences. Brands reflecting this more "back to basics" approach – whether in cooking, DIY projects, or home-based experiences such as board games – will be on-trend with modern families.

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.

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