the FUTURE of PARENTING

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BELIEFS • BETTERMENT • BELONGING

FOREWORD

OMD UK and Trinity Mirror Solutions are extremely proud to introduce *The Future of Parenting* - the next chapter in OMD Insight's propriety research initiative *The Future of Britain*, helping us get to the heart of modern parenthood and family life in Britain today.

OMD UK launched *The Future of Britain* research programme back in 2013 in response to seismic cultural and societal shifts that were taking place across Britain. Against the backdrop of fading euphoria from the 2012 Olympics and one of the toughest recessions ever experienced, our aim was to step outside of the London bubble to better understand how people were reacting to a very new looking Britain. Our work at OMD UK is reliant on the best insight possible around how people behave and make decisions, and four years on, as we experience the influence of Brexit and the abundance of technology in people's lives, this in-depth view into real Britain has never been more important.

Our most recent incarnation of *The Future of Britain* looks at modern family life and parenthood in the UK today. In recent years, we have moved from a time where 2.4 children in a nuclear family

was the norm, to much more diverse and fluid family units, yet brands and marketers often still work with the old models of family life. We set out to explore the reality of parenthood, examine how well brands and advertising represent parents today and ultimately to provide ourselves with a realistic and grounded insight into parenting today. We believe that it is only through this understanding of real people and how they live their lives that we can produce the kind of powerful marketing and communications that help to earn a greater share of people's lives.

We very much hope you enjoy reading *The Future of Parenting* and look forward to discussing our results and the implications with you.

Dan Clays
CEO, OMD UK

Andy Atkinson, Chief Revenue Officer, Trinity Mirror Solutions

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1

INTRODUCING THE FUTURE OF PARENTING

PARENTS AND FAMILIES FORM A SIZEABLE PART OF THE BACKBONE OF OUR SOCIETY TODAY. ACCORDING TO THE ONS, THERE ARE NEARLY 8 MILLION FAMILIES WITH DEPENDENT CHILDREN IN THE UK, ACCOUNTING FOR NEARLY A THIRD OF UK HOUSEHOLDS.

However, although the reality of family life has changed drastically over the past half a century, for decades, the advertising industry has tended to portray parents using a standard formula: the parents make up one part of a nuclear family, mothers as those with young, pre-school age children and dads take little role in the household and childcare duties. This simplistic view of family life is not only reflected in targeting, but also how mums and dads are depicted in advertising itself. We believe this not only ignores a huge proportion of parents who sit outside these traditional targeting parameters, but also fails to represent the real experience of parenthood today.

This is why **OMD Insight** and **Trinity Mirror Solutions** have partnered to produce an **in-depth understanding of parents**, to help brands engage in a more authentic way with this highly valuable audience.

OUR RESEARCH TOOK A MULTI-STAGE, MIXED-METHODOLOGY APPROACH - COMBINING IN-DEPTH QUALITATIVE RESEARCH AND MOBILE ETHNOGRAPHY FROM OMD UK'S ALWAYS-ON ONLINE COMMUNITY 'YOURVOICE', WITH A ROBUST QUANTITATIVE SURVEY USING TRINITY MIRROR'S PANEL.

During the qualitative stage, we hosted a week-long community on YourVoice, tasking a group of 19 parents and families to talk about and upload content on a range of different parental topics and daily behaviours. These learnings were then fed into the nationally representative survey, with over 2,000 parents. The quantitative stage also included implicit testing, to reveal entrenched subconscious perceptions amongst mums and dads.

ONLINE COMMUNITY

The research began with an initial exploration phase on our own community, YourVoice, with 19 families overall. Over the course of a week, we talked in-depth every day to 11 mums and 8 dads to understand their lives and relationships through their own words. This mini-community **allowed us to understand the different life stages of mums and dads, their tensions, how they balance responsibilities, their role models and attitudes to media and advertising.** We asked participants for feedback across a huge variety of topics designed to understand perceptions, attitudes and behaviours from work flexibility through to splitting chores.

SURVEY AND IMPLICIT TESTING

Having developed an understanding of real parents and how they live their lives, we quantified our findings through an online survey of a total of 2,010 parents. This provided an in-depth understanding of parents, **how their experiences differ within a family, perceptions of the world around them and the brands they use.** To add depth and nuance to the findings, we also used Implicit Response Testing. By analysing the time respondents took to associate each gender with responsibilities, we were able to measure the relative strength of those perceptions.

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OUR APPROACH

3

THE CHANGING NATURE OF PARENTHOOD

The world of parenting has changed drastically over the past 50 years. We've moved from a time where a nuclear family, including a married, heterosexual couple and 2.4 children was the norm, to one where family structures are more diverse, fluid and complex than ever before. Although traditional married parents are still in the majority in the UK, accounting for 4.9 million of the nearly 8 million families with dependent children in the UK in 2017 (62%, Source: ONS), approximately 3 million families no longer fit this stereotype. The ONS found the following family types (with dependent children) in the UK today:

200,000

Nearly 200,000 same sex couples, with 14,000 of these having dependent children

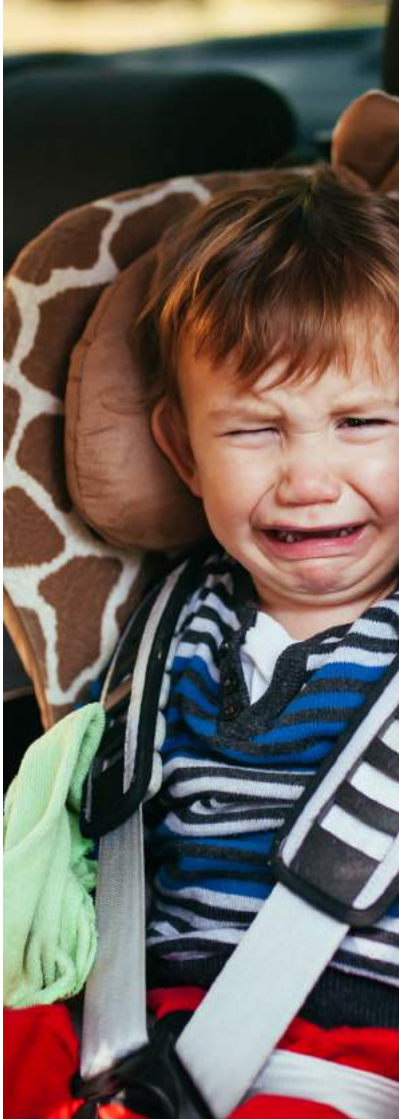
1.25M

Over 1.25 million co-habiting couples with dependent children

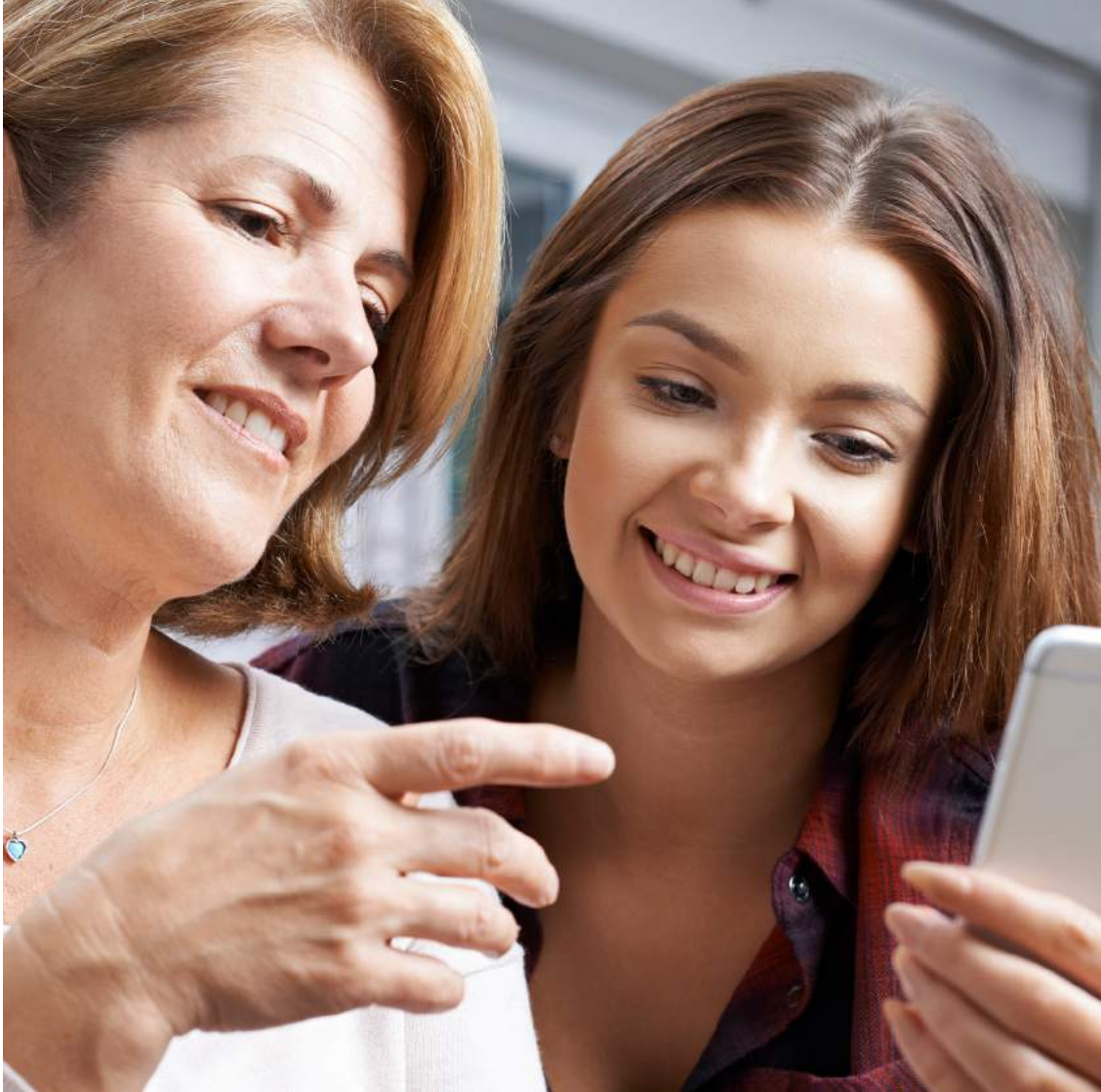
1.7M

Over 1.7 million lone parent families

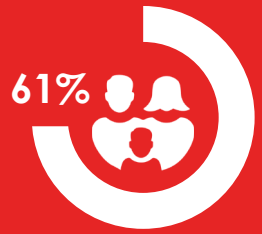
(Source: ONS)



Alongside this changing structure of the modern family with children, we are also seeing a shift in the dynamics within families. Our research uncovered a complex and disparate picture of families and roles of parents within households. From changing gender roles within households to the use of technology to help us be effective parents, through to the age that we now have children, we now live in a time where we should not rely on outdated stereotypes to describe the families that our brands seek out.



Key findings include:



Nearly two thirds of parents use some form of external childcare, with four in ten of us using grandparents for childcare (Source: OMD/Trinity Mirror)

The average age of first-time mums is 30 and the age of first-time dads is 33, which has risen from 26 for mums in 1977 and 30 for dads (Source: ONS)

One in five parents (18%) claim that the responsibility for taking time off work for child-related reasons (e.g. illness) is shared equally (Source: OMD/Trinity Mirror)

74%

of mothers are working, either full or part-time, with 28% of mothers claiming to earn the most in the household (Source: OMD/Trinity Mirror)

Technology is changing the way we parent: 32% agree that technology helps them to be a better parent (Source: OMD/Trinity Mirror)

36%

of men altered their working hours in some way after having children (Source: OMD/Trinity Mirror)

As the world of parenting becomes more diverse than ever before, brands should ensure that they reflect this diversity and understand roles and responsibilities. It is only through this understanding that we can ensure that we continue to provide communications that resonate with the right people at the right time.

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AREAS OF ANALYSIS

PARENT PERCEPTIONS OF BRANDS AND ADVERTISING

Are brands meeting parents' expectations? Do parents feel advertising accurately represents their experience? Does advertising ignore certain parent types?

PARENTS UNDER PRESSURE

How much pressure do parents feel? What is the 'ideal' parent? How do parents rate themselves compared to the 'ideal'? Do they have difficulty switching off? Are they falling short of their own expectations? How close is their parenting style to their own parents? What advice do they receive from parents?

MUMS AND THE MENTAL LOAD

What is the parental and children's share of tasks, chores and responsibilities? Is there an inherent bias towards mums carrying out most tasks? Is this stronger amongst mums than dads? What can implicit testing tell us about ingrained stereotypes? Is the situation the same for childcare responsibilities as it is for household?

WORKING PARENTS

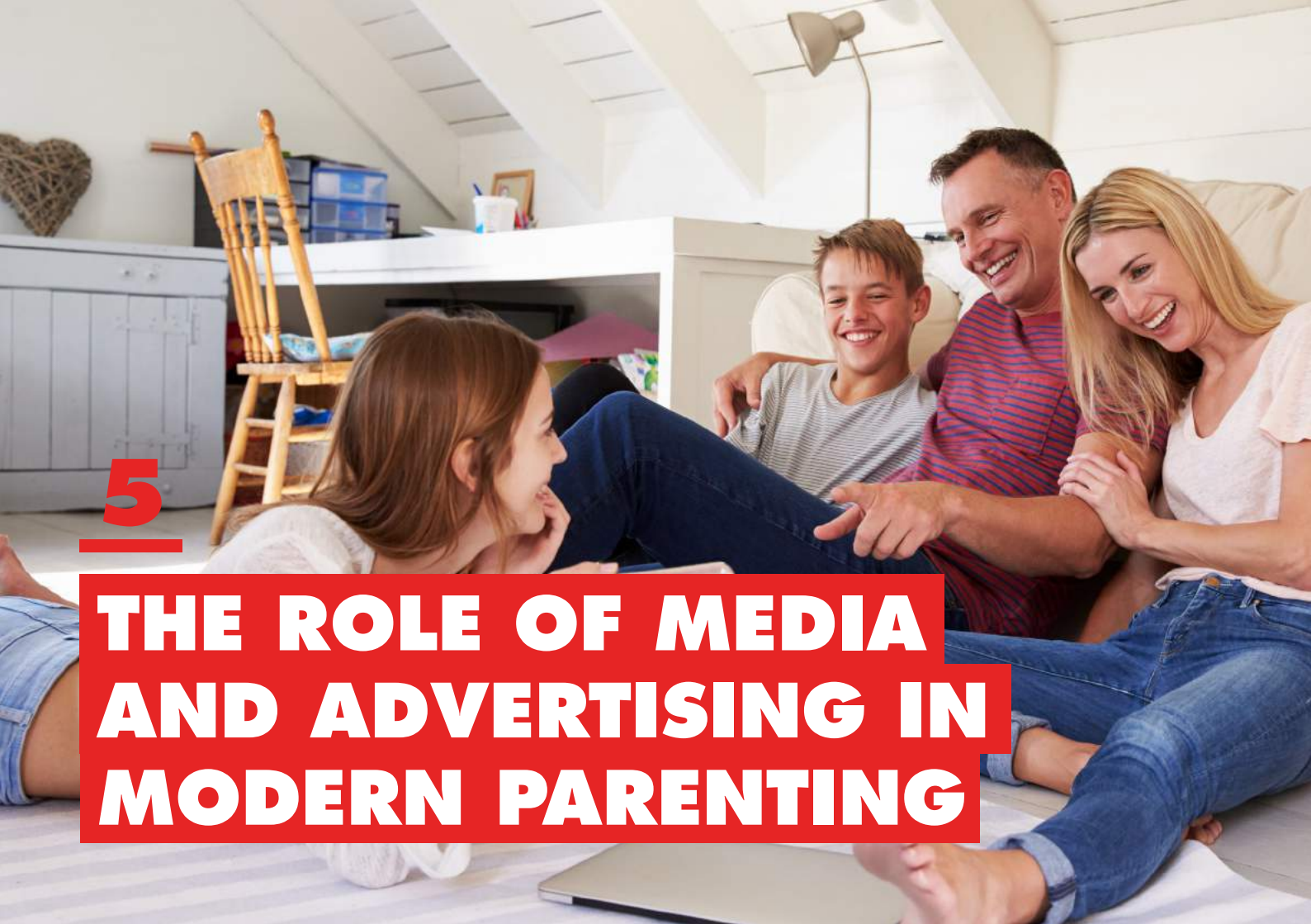
Are modern workplaces flexible towards working mums and dads? How does the situation change for men and women? Is there an increasing need for childcare? What is the role of grandparents? Do working mums still take on more than men?

ATTITUDE VS BEHAVIOUR

Do parents feel share of house and child-related responsibilities should be evenly spread? Does reality match up to their attitudes?

IMPLICATIONS

What do brands need to do to help gain parents' trust? How should family brands re-think their audience targeting? Who should brands and advertisers be looking to target? How should the media industry move forward with its portrayal of parenthood?



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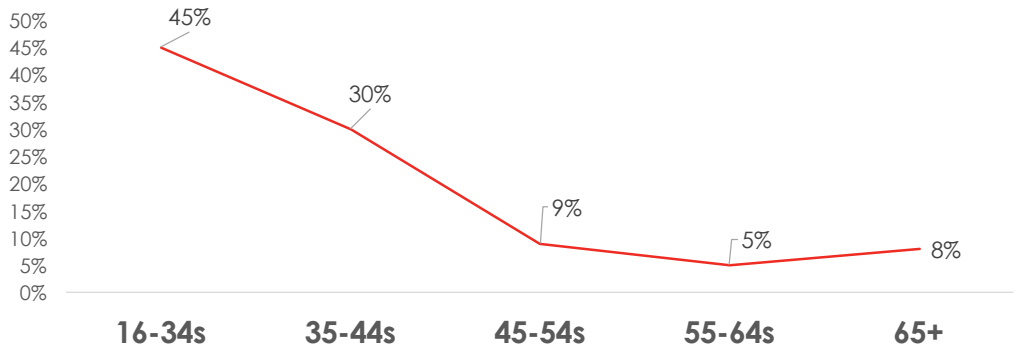
THE ROLE OF MEDIA AND ADVERTISING IN MODERN PARENTING

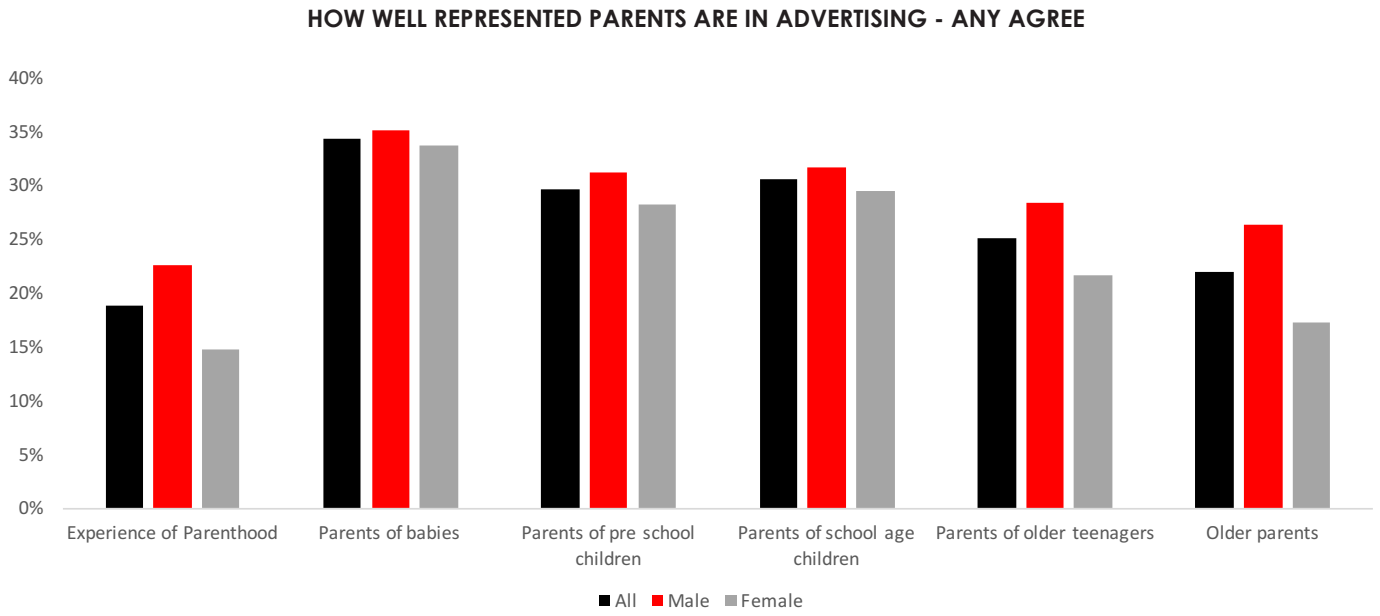
As we saw previously, the structure of our society and the gender roles within families with children are changing, meaning that some of our long held and ingrained beliefs about parents are being challenged. But do parents feel like their lives are reflected by media, advertising and brands today? We explored all of these themes in our research.

A significant finding of the research is that brands are struggling to empathise with and understand parents. Only 19% agree that advertising represents their experience of parenthood. This is particularly true when we look at older parents: with just 13% of those aged 55+ feeling advertising represents their experience of parenthood versus 45% of 16-34s.

HOW WELL DO YOU FEEL ADVERTISING AS A WHOLE REPRESENTS YOUR EXPERIENCE OF PARENTHOOD?



Brands and the advertising industry's preoccupation with parents of babies and young children means older parents are increasingly feeling neglected and detached from brand communication.



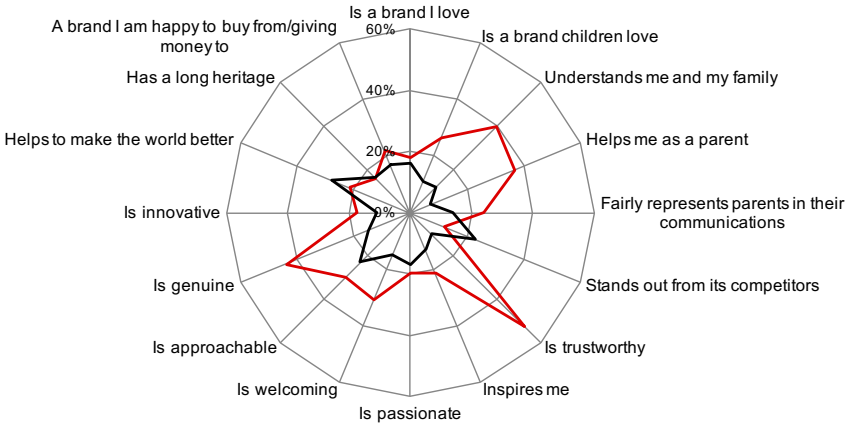
Interestingly, across all ages, men are more likely to feel better represented by advertising than women. This could be a result of their relative detachment (compared to mums) from the realities of parenting, a theme which will be explored in the next section.

Advertising not only overlooks older parents, but a wide range of family and parent types such as same-gender families, families with disabled children and **stay-at-home dads** - nearly half of participants feel that stay-at-home dads are not well represented in advertising. The industry also isn't doing enough to represent the lives of people **outside London**: 46% of parents in London feel represented by advertising versus just 14% amongst parents living outside of London. Brands are struggling to connect with consumers outside the capital as they score much lower outside London for almost all attributes.

ESSENTIAL QUALITIES OF AN IDEAL 'FAMILY-FRIENDLY' BRAND

All this means that overall, **brands are not meeting parents' expectations.** There are large gaps between what parents want from an ideal parent-friendly brand and what they think brands actually deliver. Based on an average of 20 leading brands, brands fall short against a number of important attributes, including being trustworthy, genuine and understanding of family life. These results are further exaggerated amongst parents who live outside London, where the gap is even greater.

IDEAL PARENT-FRIENDLY BRAND



Source: OMD UK and TMS, Future of Parenting
Base: 2,010 respondents, 984 mums, 1021 dads
Q52: Which, if any, of the following would you say are essential for a brand to be considered 'family friendly' & Q53: Which, if any, of the following do you associate with brand x (average of 20 brands)

Brands are therefore not perceived to be reflecting the realities of modern parenting; although 40% of people we asked said understanding their family is an essential role of a brand, just 12% associated this trait with the brands we questioned them on.

Advertising needs to better reflect experiences of parents and move away from a male, London-centric view of parenthood. They can start by looking to understand the reality of parenthood to ensure that advertising resonates, and that they plan effectively with the right message, in the right place, at the right time. So what do we know about the experience of parents today?

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PARENTING IN 2017

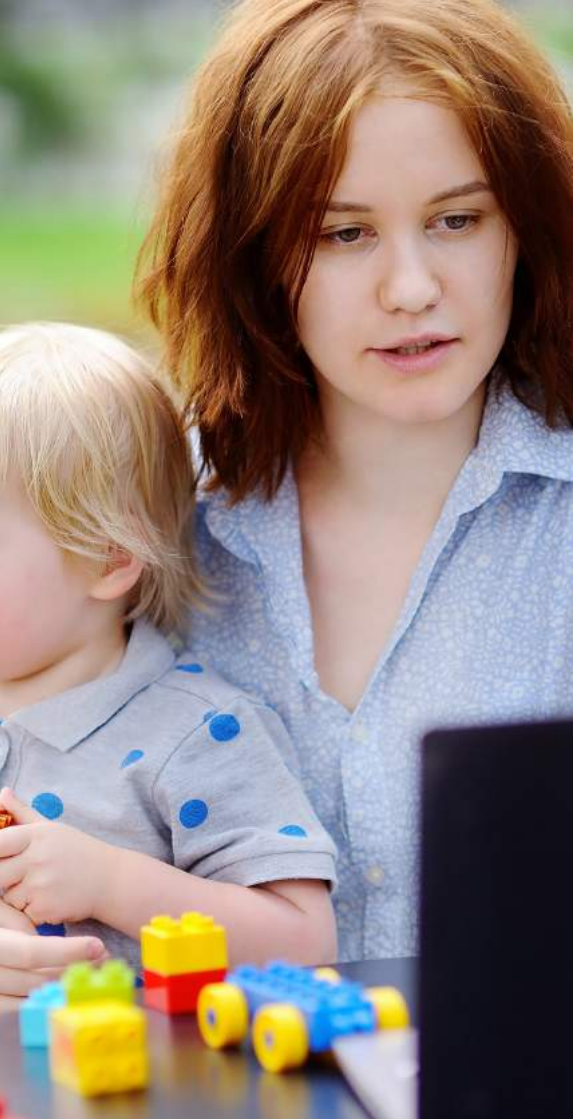
PARENTS UNDER PRESSURE

MUMS AND THE MENTAL LOAD

WORKING PATTERNS

ATTITUDE VS BEHAVIOUR

KEY TAKEOUTS AND IMPLICATIONS FOR BRANDS



PARENTS UNDER PRESSURE

Our research has discovered that parents are setting themselves high standards and feel an enormous pressure to live up to them - 57% feel there is pressure to be the 'perfect' parent. Our qualitative stage revealed mums and dads often feel under pressure to manage all their responsibilities at once, leading some to feel squeezed and underappreciated. Under pressure, 46% find it difficult to switch off and this rises to 51% for mums in full time work.

"I do push myself to the point of breaking for my kids and I don't tend to spend money on myself so my kids can have the things they want or need so they can have the best life I can give them, but even then I still feel like I should be doing more."
Male, 45-54

I OFTEN FEEL UNDER PRESSURE TO DELIVER IT CAN SOMETIMES BE DIFFICULT TO KEEP ON TOP OF EVERYTHING ESPECIALLY WHEN I USED TO WORK SO IT COULD BE A DIFFICULT TASK JUGGLING HOUSEWORK, PAID WORK, AND ENSURING EVERYONE IS CLEAN AND FED! I OFTEN FEEL A BIT UNDERAPPRECIATED.

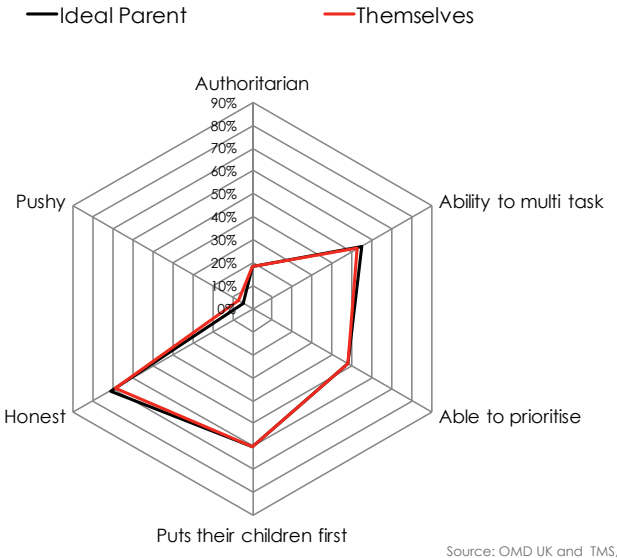
Female, 18-34

THE IDEAL PARENT

When we asked what the ideal parent looked like, being supportive (81%), encouraging (77%) and affectionate (74%) are the top three qualities they feel a good parent should have. This was followed closely by being honest and putting children first. This tells us that emotional traits are more important than material or functional traits.

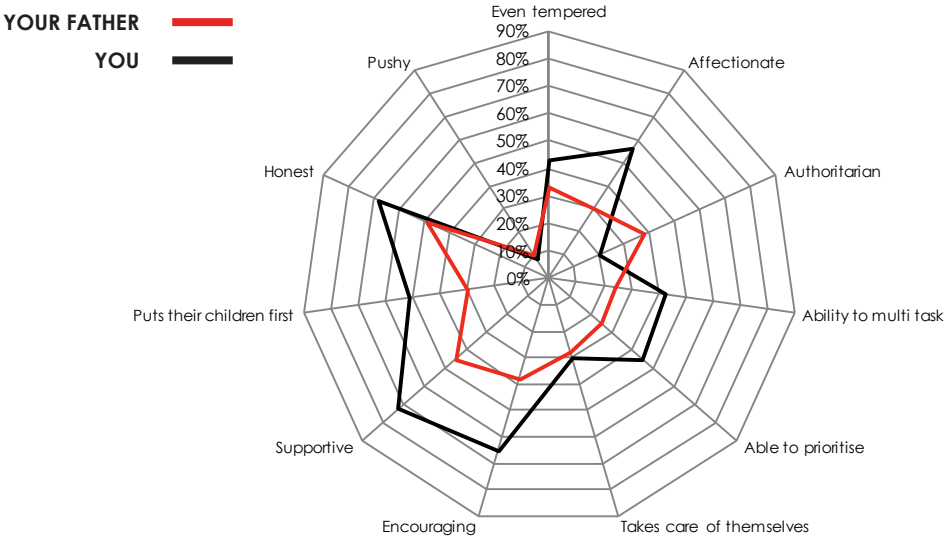
Interestingly though, it's these emotional traits where parents claim to fall short. Although such qualities are viewed as the most ideal to have, parents rate themselves as less even tempered, encouraging, affectionate and supportive than the ideal. However, when it comes to practical capabilities such as putting kids first, having the ability to multitask or prioritise, they match their expectations.

When it comes to their own parents, mums and dads feel they outdo them on almost all parental traits, particularly the emotional ones. This is especially true when we look at how dads rate their own parenting abilities compared with their father's.



Source: OMD UK and TMS, Future of Parenting
Base: 2,010 respondents, 984 mums, 1021 dads
Q18: Which, if any, of these traits do you think a good parent should have? Q19 And which, if any, of these traits do you think you possess as a parent?

DADS



Source: OMD UK and TMS, Future of Parenting
Base: 2,010 respondents, 984 mums, 1021 dads
Q52: Which, if any, of the following would you say are essential for a brand to be considered 'family friendly' & Q53: Which, if any, of the following do you associate with brand x (average of 20 brands)

Dads of today feel they are much more affectionate, supportive and honest with their kids than the previous generation. As a consequence, dads actually consider their parenting style to be closer to that of their mother's, whilst the split is more even for mums. Perhaps unsurprisingly, overall, over half consider their parenting style to be close to their own parents.

MUMS AND THE MENTAL LOAD

Whilst mums and dads feel pressure to be the perfect parent, mums are significantly more likely to say this is the case - 62% of mums feel there is pressure to be the perfect parent compared to 53% of dads. When it comes to switching off:

51% of mums say they find it difficult to switch off compared to 42% of dads.

As a result of this increased pressure, mums place a greater emphasis on their role as a parent. They are significantly more likely than dads to consider themselves as a role model for their children across a wide range of areas such as helping others (67% of mums vs 47% of dads), positivity (66% of mums vs 57% of dads) and morality (66% of mums vs 61% of dads) compared to dads.

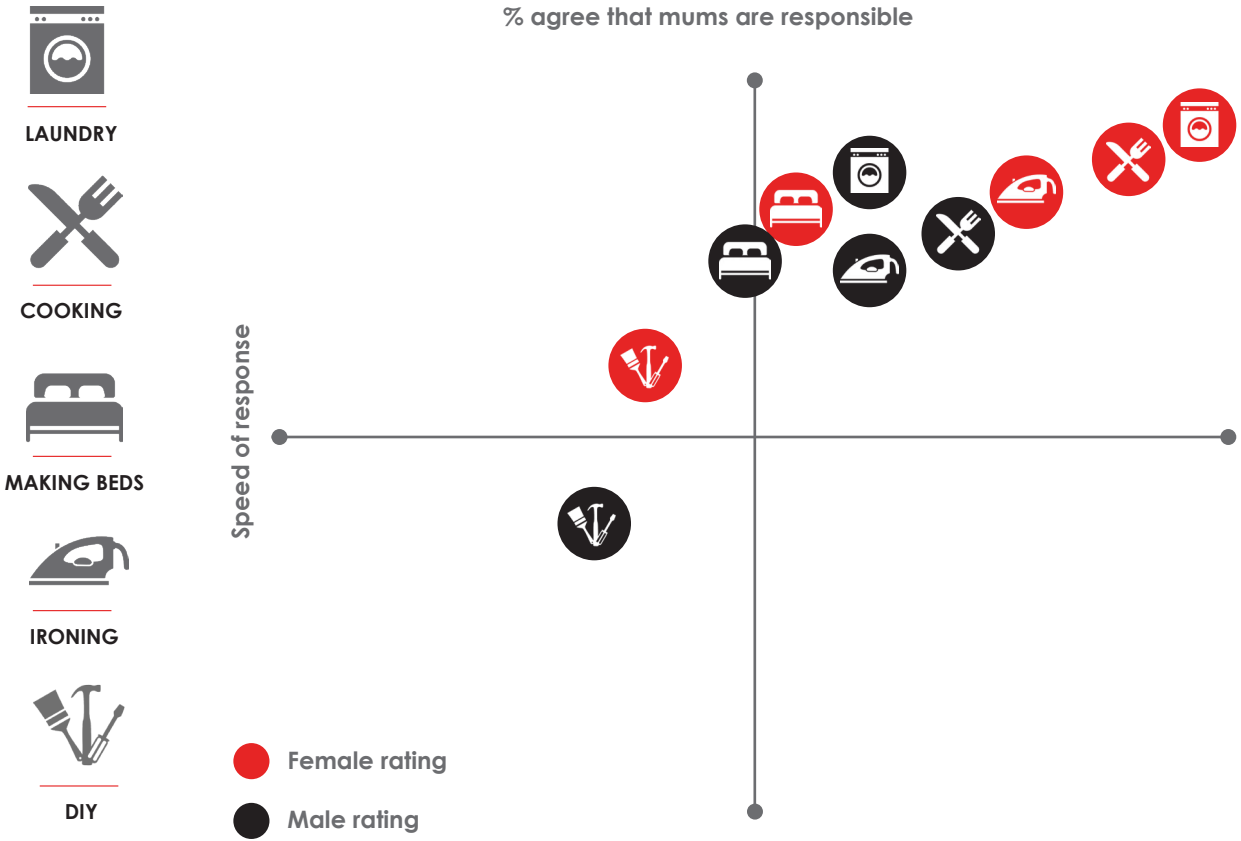
62% OF MUMS FEEL THERE IS PRESSURE TO BE THE PERFECT PARENT COMPARED TO 53% OF DADS

MUMS ARE EXPECTED TO CARRY OUT MOST TASKS

The results clearly back up the notion that the 'mental load' is much stronger amongst mums than it is with dads. Mums feel inherently responsible for the household and are more likely than dads to say that mums should be solely responsible for a number of household tasks - particularly ironing, laundry and cleaning bathrooms. This is a similar story for child-related tasks, however the difference between mums and dads is less pronounced.

Through our use of implicit testing, we discovered that mums have more entrenched views of their role than dads do. Overall, mums are much faster to select themselves as being responsible for certain tasks than dads are. This reveals just how ingrained parental stereotypes are amongst mums themselves.

IN FACT, MUMS HAVE MORE ENTRENCHED PERCEPTIONS ABOUT THEIR ROLE THAN DADS DO



WORKING PATTERNS

Over half of parents have changed their work hours as a result of having kids. However, maternity and paternity leave aside, mums are most likely to halve their working hours to fit around their children (80% vs. 36% dads). In addition, mums are significantly more likely to have reduced their hours or stopped working altogether for two or more years. They are also overwhelmingly more likely to be the one to take time off work for child-related activities such as doctors' appointments or sports days (79% vs. 28% dads). However, the gap is closing amongst 16-34 year olds - the percentage of mums and dads who have changed their work patterns are more much more aligned than previous generations with 59% of men and 80% of women having changed their working patterns.

Wanting more time with their children and the cost of childcare were the main reasons mums cited for reducing work hours. Dads note similar reasons, but are also significantly more likely than mums to say inflexibility of the workplace. With increasing numbers of mums now in work, the need for childcare is growing. The younger the parents, the more likely they are to use or have used help with childcare (79% amongst 16-34s). However, as we have already seen, cost of childcare is one of the main reasons mums and dads have to change their work patterns after having kids.

The costs of childcare are rocketing and moneyadviceservice.com now estimates that it costs £212.86 per week to send a child under 2 to nursery full time. This means that we increasingly rely on grandparents to provide an essential care-giving role for working parents who are squeezed for time and money. 40% say that grandparents help looking after the children. They not only help with childcare: two thirds of parents (66%) say they also receive advice from the grandparent on their children's food and diet, sleeping time and school.

THE YOUNGER THE PARENTS, THE MORE LIKELY THEY ARE TO USE OR HAVE USED HELP WITH CHILDCARE (79% AMONGST 16-34S)

ATTITUDES VS BEHAVIOUR

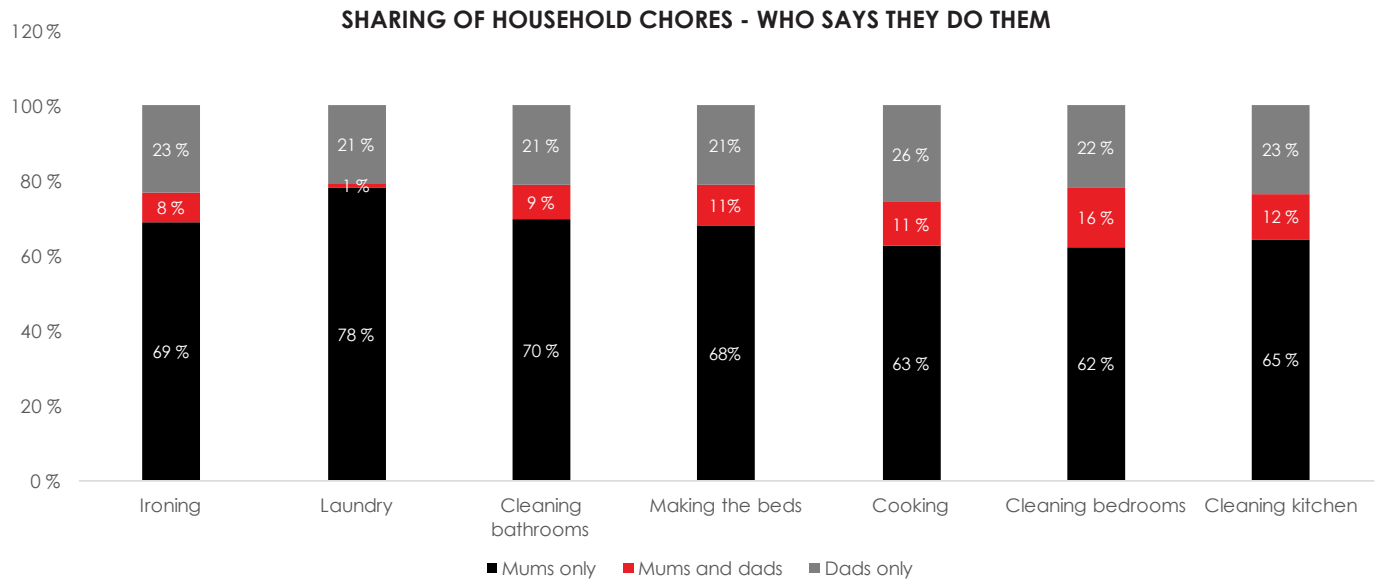
When asked who should be responsible for both household and childcare-related tasks, we found the majority considered these to be a shared responsibility. These included everyday household tasks such as cooking (which 65% of parents felt both mums and dads should share) and making the beds (60% of parents felt both mums and dads should share).

However, after delving deeper into the day-to-day running of the household, we found these attitudes did not necessarily reflect actual behaviour. The reality is that despite promising shifts towards a more equal spread of responsibilities, mums are still much more likely to carry out chores than dads. Additionally, those who felt it should be the responsibility of one parent were more likely to say mums than dads.

65% OF PARENTS FELT BOTH MUMS AND DADS SHOULD SHARE THE COOKING AND 60% OF PARENTS FELT THEY SHOULD SHARE MAKING THE BED

It is clear that although parents feel that responsibilities should be shared amongst partners, this is not translated in behaviours as mums not only do more, but feel they should be doing more too, as we've already seen with the implicit tests results - mums feel inherently responsible for household tasks.

This is a **gender truth** rather than employment status, as even working mums do more than dads. 70% of mums in full time work say they solely do laundry, versus 21% of dads.



Source: OMD UK and TMS, Future of Parenting
Base: 2,010 respondents, 984 mums, 1021 dads
Q27: Who do you think should be responsible for the following tasks?

DADS HAVE DIFFERENT PERCEPTION OF CHORES

One reason for this may be that dads have different perceptions of what 'sharing chores' actually means, and this results in a discrepancy between how much dads say they do and how much they really do.

"I classify a chore as any job that needs doing around the house which makes it clean and tidy again. My partner would probably class it as just making sure the kitchen is tidy!"

Female, 18-34

"It would depend on factors such as specific skills or physical requirements. I will always do DIY, garden & cars (all more physical); my wife ironing (skill) & most household cleaning. However, we share many chores - painting/decorating, cooking, shopping, laundry. I would say my wife & I agree on the distribution of chores. One notable exception, when the children were young, I never changed a nappy. I justified this on the grounds of allocation of skills!"

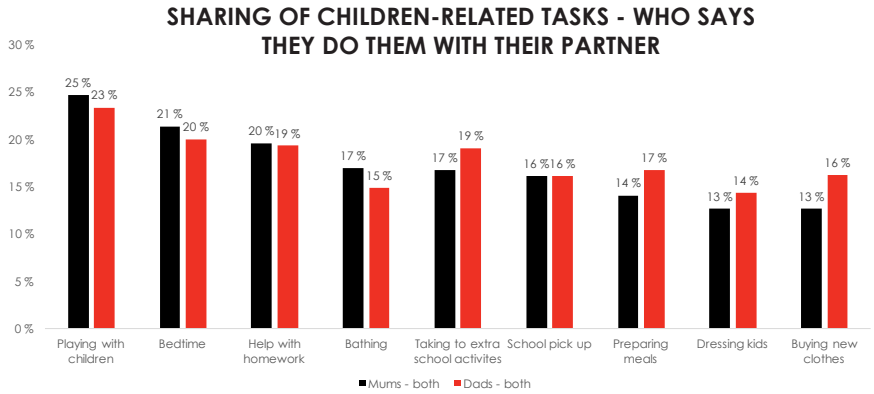
Male, 55+

"I think that men tend to see smaller things as a chore, like putting away something or picking up the washing and putting it in a basket. I don't really see something like putting the bins out as a chore, it's just something that needs doing."

Female, 35-44

DADS LIKE TO THINK THINGS ARE EQUAL

Dads are more likely than mums to say that they share chores such as washing up, cooking and cleaning with their partner. However, the percentage of mums who feel household tasks are shared is comparably lower. Is this an overestimation of dads' own involvement, or are mums underestimating the role dads are playing in the household?



Source: OMD UK and TMS, Future of Parenting
Base: 2,010 respondents, 984 mums, 1021 dads
Q28: And in your household... Who is responsible for the following child related tasks?

When we look at reach per activity using Touchpoints data, it seems on the surface that dads are just as heavily as involved as mums in the day-to-day running of the house. The time spent on each activity tells a different story - dads may be doing the same tasks as mums, but they spend far less time doing them. This means that while dads perceive things to be fairly equal and claim to be sharing the load with their partner, the time they spend on tasks tells us that mums are still doing more. It's clear that attitudes and behaviour need to be further aligned to bring about equality in the household.

Interestingly, when it comes to child-related tasks, expectation and behaviour is much more aligned. We see the same story as before, with the majority of parents feeling that childcare-related responsibilities should be shared equally. And actual behaviour seems to match this attitude (more than it does for household tasks), meaning the share is much more evenly spread.

KEY TAKEOUTS AND IMPLICATIONS FOR BRANDS

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The world of parenting is more diverse and less homogenous than ever before. Both the structure and the roles within families no longer follow the long-held stereotypes that we often assume exist. Brands should ensure that they understand this diversity and move beyond narrow definitions such as 'housewives with kids'. While it may be difficult to reflect the diversity and richness of all families in content and communications, we can use insight and data to understand these audiences and ensure that we target each group using addressable techniques, finding the experience and message that resonates most effectively with each group.

Parents generally don't think that advertising reflects them with empathy and understanding. Only one in five parents feel that brands reflect their experiences of parenthood and this is particularly true of older parents, women and those with younger children. Brands should invest in ensuring that they understand parents and reflect this in communications. Only by becoming truly understanding of the reality of parenting across different groups, can we start to understand the experiences, emotions and core needs of different parent groups, which may help us to move towards a more empathic view of parents.

Parents place themselves under huge amounts of pressure and often see themselves as lacking in empathy and understanding. Brands should play a supportive role, relieving pressure and celebrating success. We should go further to understand the challenges that are common to families – for example we know that a large proportion across all parents feel pressure to act as the 'perfect parent' and often feel that they fall short, particularly when it comes to the emotional and supportive elements of parenting. By understanding and supporting in these challenges, brands can develop a narrative that resonates across a broad spectrum of parents. We should also harness the supportive function that technology affords parents – parents often rely on online forums and social media to gain reassurance and support in parenting. We should ensure that we partner with the right platforms and ensure that we understand the nature of support sought from these.

Although men are far more involved than ever before and we all agree that we should share tasks, mental load still sits with women and behaviours are often not balanced. Our research has shown that the gender stereotypes we hold are often deeply ingrained for both men and women and, although we often have an attitude of equality, this is not always carried through to actual behaviour. This is perhaps the most challenging area of marketing to parents. Brands need to tread carefully when talking to parents, and find the difficult balance between being realistic and reflecting the experiences of different parents and being patronising. We should question all of our assumptions that we hold when marketing to parents and ensure that our communications resonate while helping to challenge our inherent biases.

CONTACT

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