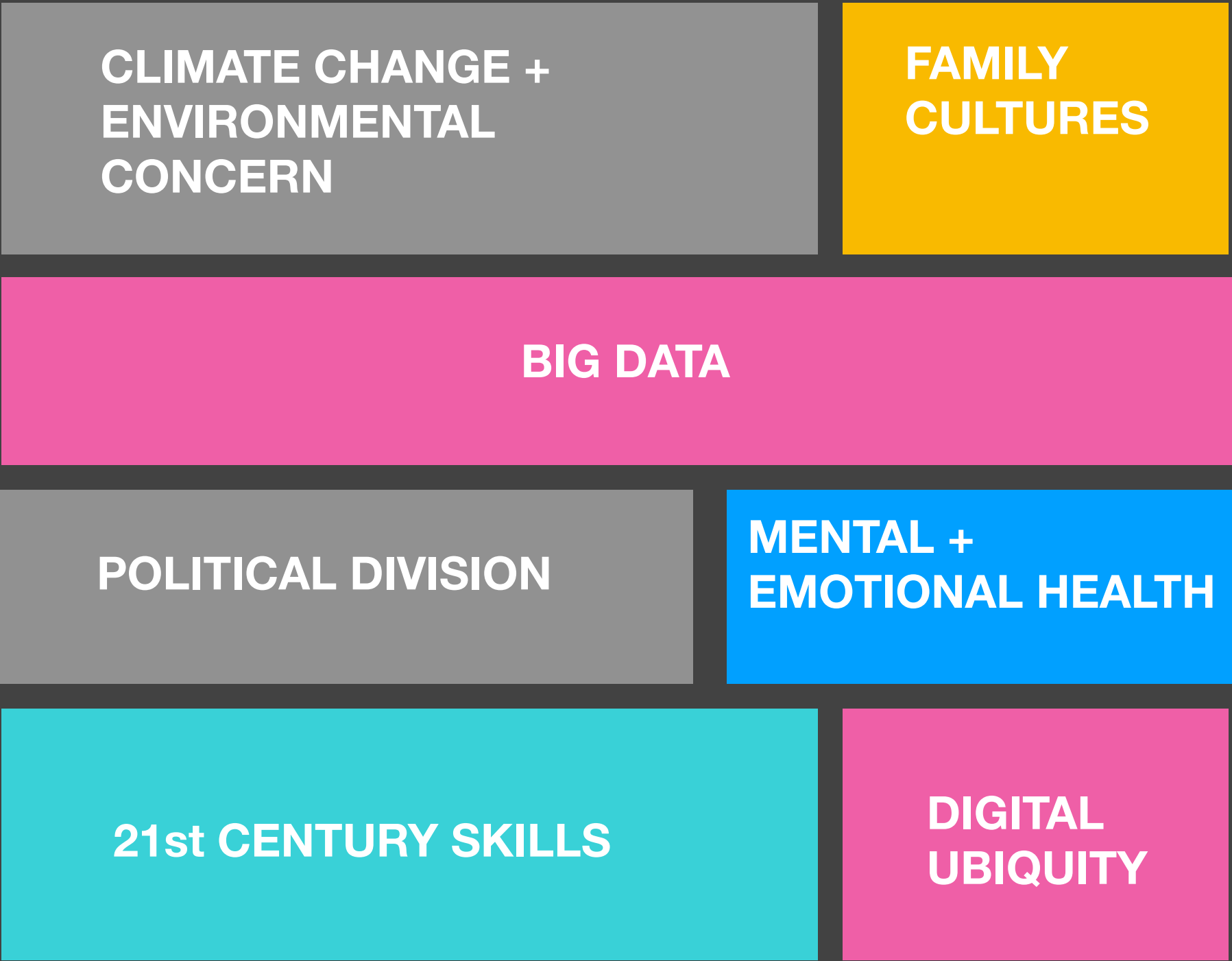




# MACROTRENDS

# CN2019 ANALYSIS SCHEMA

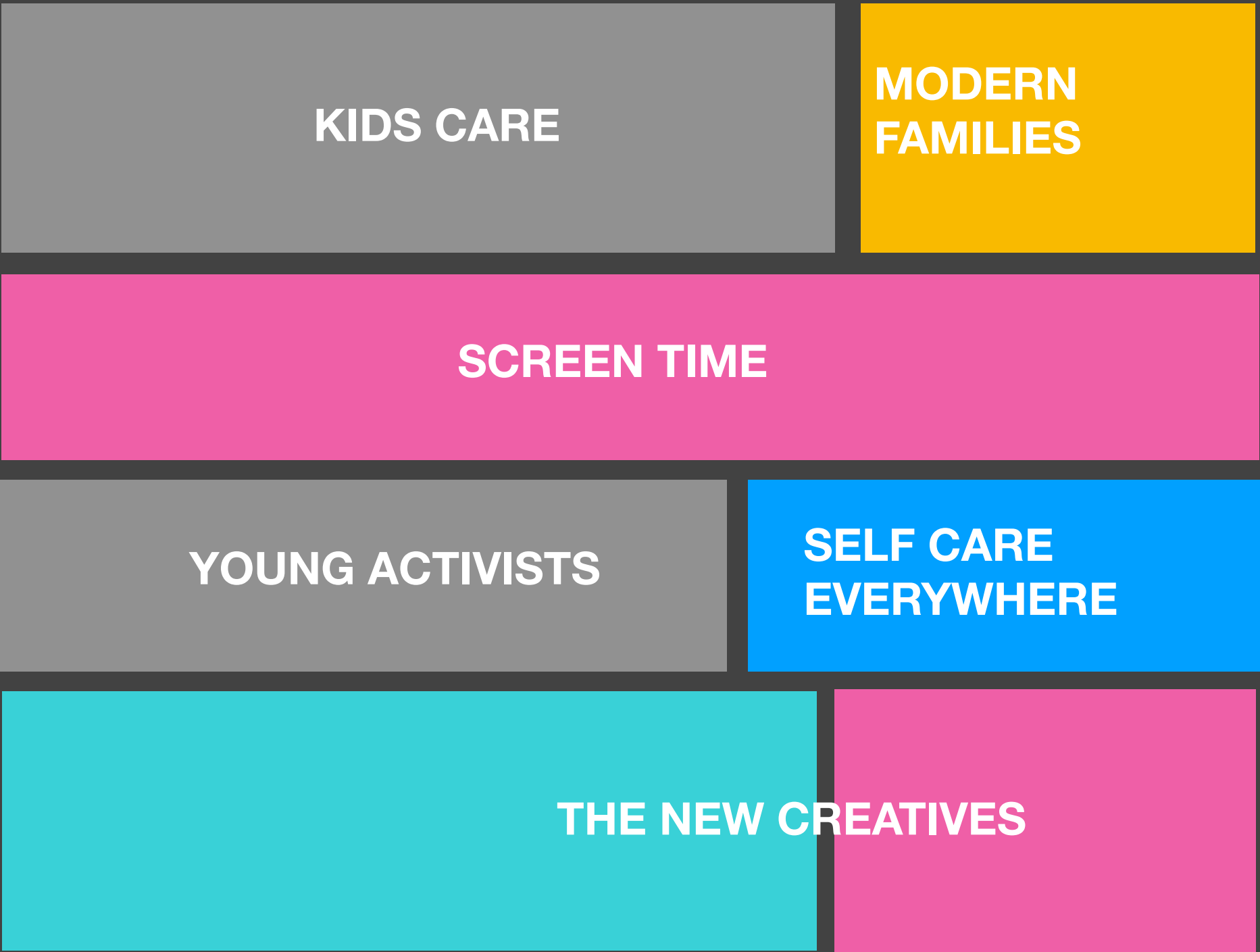


## DRIVERS

fundamental forces that are beyond the control of the individual but shape their world. Drivers directly and indirectly influence trends.

## TRENDS ARE A RESPONSE TO DRIVERS

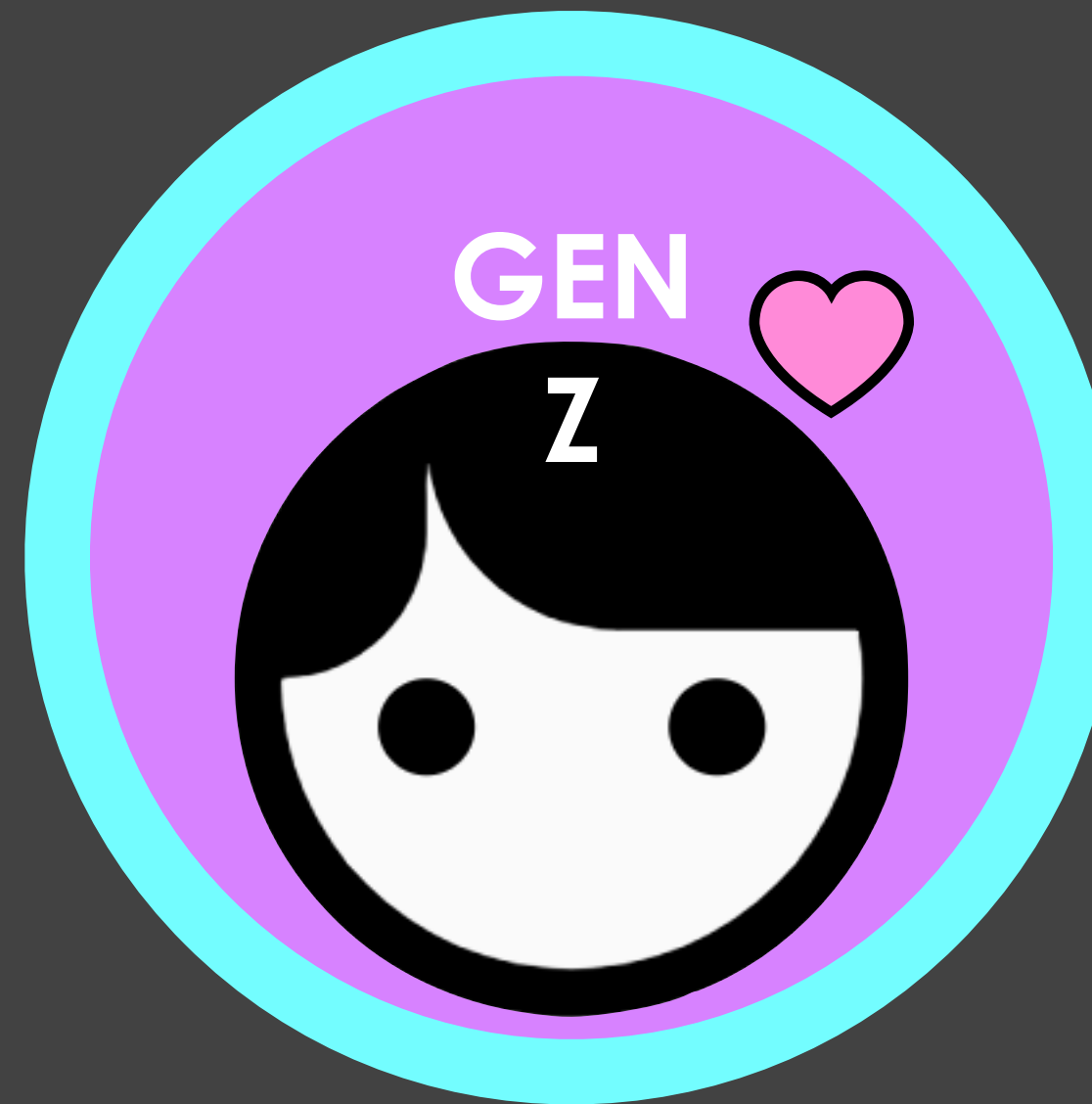
When drivers are beyond the control of the individual, communities are born in response to the need for agency, control and self-expression.



# Who is Gen Z?

## **THEY ARE:**

- Unable to adhere to a single identity
- Likely view themselves on an ever-changing spectrum
- Creative, connected and consider how others view them in a digital space
- Informed and always online
- They know "everything" due to constant information, so they don't need to know "anything"
- Reliant on the ability to search information
- Wanting to supporting ethical and responsible organizations and products



## **THEY ARE NOT:**

- Loyal to brands, services or platforms
- Not Immune to the fears of being born into economic turmoil
- Interested in ownership, over access
- Interested in previous generations definitions of identity, culture, youth etc

# KIDS CARE

Kids are taking a stand against products and services that do ethical or environmental harm, they expect the brands they love to do the same



# Kids Care

Kids are taking a stand against products and services that do ethical or environmental harm, they expect the brands they love to do the same

## Stats:

- **Two thirds of Alphas want to buy from companies that are trying to do good in the world** – meaning that all companies in the future will need to put ethics and morals at the center of their business. (JWT)
- 84% of the surveyed **young people** agree that they **need more information to prevent climate change**. [UNEP, 2011, <http://bit.ly/1Niu2q7>]
- Gen Zers **value online communities** because they **allow people of different economic circumstances to connect** and mobilize around causes and interests. (McKinsey)
- 66% of the Gen Zers surveyed believe that communities are created by causes and interests, not by economic backgrounds or educational levels (Mckinsey)
- Gen Z is also **more willing to accommodate the failings of companies**, as long as they respond quickly and make change. (ex. companies responding on twitter)

## "The evolution of consumption"

Gen Z breaks consumption down in 3 distinct ways: Access, Self-Expression and Ethics

**Emma Watson**  
**Feel Good Style**



## "Cancel Culture is relative"

If a company responds quickly and sincerely, Gen is most likely to forgive instead of turn on that company.

**Delta Airlines and Booksmart**

# Kids Care

Kids are taking a stand against products and services that do environmental harm, they expect the brands they love to do the same

## WHAT MATTERS TO KIDS?

- Companies that demonstrate good, fair and ethical behavior towards people and the environment
- The ability to consume (physical & digital ) content and product that gives back
- Their undefinable natures makes them less loyal to brands and more loyal to causes
- Companies and brands can make mistakes as long as they are forthright, honest and make change.



## HOW MIGHT CN SUPPORT KIDS COMMITMENT TO THE WORLD AROUND THEM?

- Focus less on the "sustainable"" efforts of the CN brand and identify what causes CN stands for
- A CN/WM could make a commitment to sustainable packaging and products
- CN could partner with a teen/young adult influencers
- CN could identify a character ambassador to speak to kids about our positive and impactful efforts
- Plan a holistic campaign around earth day, summer, beach day, etc.
- CN could sponsor animals
- Bring kids into the conversation of what does "sustainable" mean to you. What do YOU expect from your favorite brands

# THE NEW CREATIVES

Apps and Art overlap giving everyone a sense of creative control and the expectation of good design.



# The New Creatives

Apps and Art overlap giving everyone a sense of creative control and the expectation of good design.

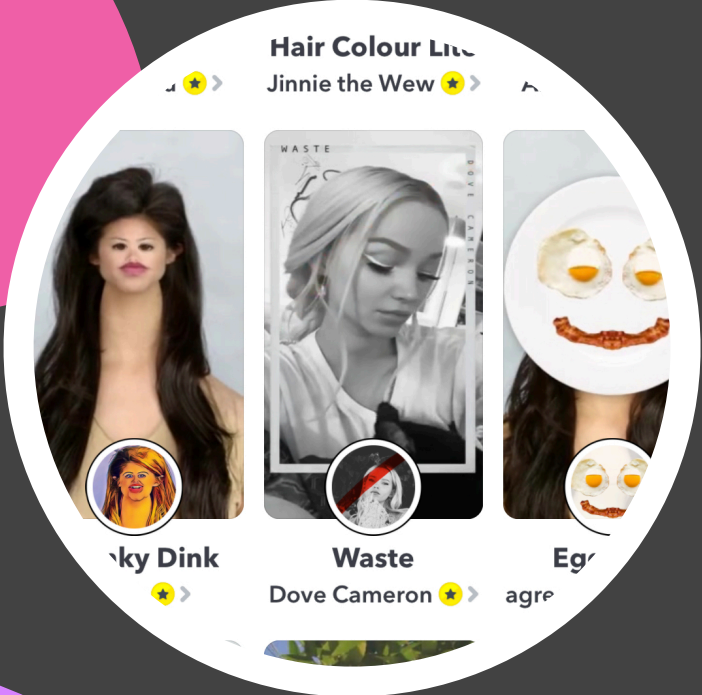
Stats:

- Over half (51%) of gen Z feel that they are **more creative than previous generations.** (JWT)
- More than half (55%) of gen Z say that they find **social apps** and the internet a **more creative** space than what they experience offline. (YouthBeat)
- 56% use **social apps to express themselves creatively.** (YouthBeat)
- Asked how they spend their **free time offline**, 77% of gen Z select at least one **creative activity**, such as drawing, illustrating, journaling, or playing an instrument. (Smarty Pants)
- Among gen Zers, **27% have hacked or adapted an app** or website's features to do something that isn't typically available, such as using separate apps to add sound, video, imagery or music. (JWT)

## "Everyone is a Content Creator"

Engagement is multi-dimensional & always available, Kids and teens are in control and aware of their digital identity

Snapchat  
Community Lenses  
VSCO app

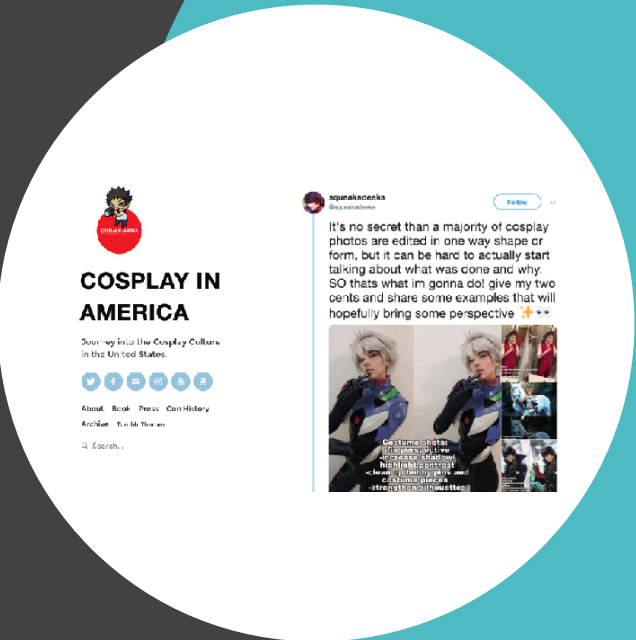
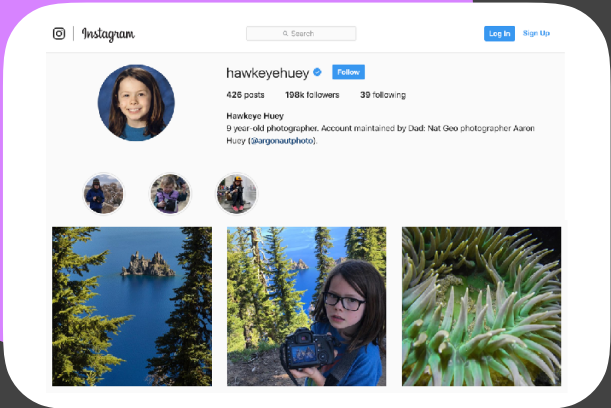


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## "Art is Attainable"

Kids can communicate with real artists and kid influencers, making art and design much more attainable.

Rebecca Sugar AMA  
Hawkeye Huey  
9 photo influencer



## "Creative Communities"

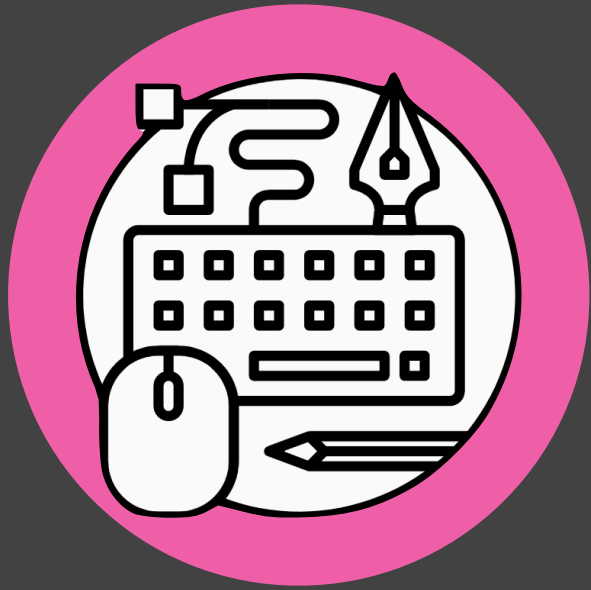
Kids provide feedback, learning and support all while navigating the trolls, a new constant in our online lives.

Tumblr Cosplay Communities

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# The New Creatives

Apps and Art overlap giving everyone a sense of creative control and the expectation of good design.



## WHAT MATTERS TO KIDS?

- Access to creative Tools
- The ability to customize/hack/design
- Social/sharing components
- The ability to interact with each other
- Not to be locked into a platform

## HOW MIGHT CN SUPPORT THIS NEW CREATIVE ECONOMY ?

- Assuring our fostering creativity efforts create new paths for kids self-expression
- Kids want to be able customize, control, adapt and hack.
- Being consistent across platforms so kids don't feel tied down to one
- Giving kids DIY and aspirational art via influencers and professionals
- Understanding how CN can support creative contributions in a way that is valuable to kids
- Seeking partnerships that speak to the kind of creativity we want to represent.
- Identifying creative spaces that are currently untapped or ripe for development



# SCREEN TIME

Kids are logged in almost half their waking hours, but active screen time makes all the difference



# Screen Time

Kids are logged in Kids are logged in almost half their waking hours, but active screen time makes all the difference almost half their waking hours.

## Stats:

- Very young children are exposed to **twice the screen time as children in the late 1990s**, exceeding pediatric guidelines (WHO)
- About **50 percent of teens worry they spend too much time on their cell phones**, and 36 percent of parents of teens feel they themselves do, too (PEW)
- Teens today are spending an average of nine hours a day online, while **kids from ages eight to 12 are spending an average of six hours online** (PEW)
- there is a very fine line between **passive screen time**, defined as when a child **passively consumes digital content with no thought**, creativity or interaction required to progress, and **active screen time**, which **involves cognitive thought** and/or physical engagement (Common Sense)
- After studying children ages 4 to 11 on their use of screen time, a University of Michigan study found that **"how children use the devices, not how much time they spend on them, is the strongest predictor of emotional or social problems connected with screen addiction."** (UM)

## "Screen Time"

The Debate rages on about the effects of screen time and passive vs active engagement. Screens aren't going anywhere, so how to we assure safety



## "Kids Health"

Fitness and Health tracking has entered the kids market to quantify and gameify activity.

**Nintendo Ring Fit**



# Screen Time

Kids are logged in almost half their waking hours.



## WHAT MATTERS TO KIDS?

- The average child is spending 6+ hours a day looking at a screen
- Passively - that's harmful both physically and mentally
- Actively - that supports cognitive development and aides in creative problem solving and communication skills

## HOW MIGHT CN RISE ABOVE THE "BAD" SCREEN TIME INTO THE ACTIVE SPACE?

- Continue expanding into digital and physical spaces that actively engage creativity and interaction
- Partner with SMEs about the healthy ways to expand our digital and gaming experiences (AR, VR, Communities, AMA's etc/Ex: WL Robotics League
- Parents are less weary of "screen time" than previously, but do put effort in researching "safe" or "healthy" digital activities





# SELF CARE EVERYWHERE

Anxiety and Depression have been increasing since the 90s. Kids are ready to talk.

# Self Care Everywhere

Anxiety and Depression have been increasing since the 90s. Kids are ready to talk.

## Stats:

- **Anxiety is the leading mental health issue among American kids.** Having risen 20% from 2007-2012 with continual growth year over year. (WHO)
- 80 percent of kids with a diagnosable anxiety disorder and **60 percent of kids with diagnosable depression are not getting treatment**, according to the 2015 [Child Mind Institute Children's Mental Health Report](#). (CMI)
- Anxiety disorders affect one in eight children. Research shows that **untreated children with anxiety disorders are at higher risk to perform poorly in school, miss out on important social experiences**, and engage in substance abuse. (ADAA)
- **One thing we know about anxiety and depression is that they correlate significantly with people's sense of control or lack of control over their own lives.** People who believe that they are in charge of their own fate are less likely to become [anxious](#) or depressed than those who believe that they are victims of circumstances beyond their control. (CDC)

## "Mindfulness + Gratitude"

Many brands are leaning into mindfulness and gratitude practice giving kids access to digital and physical ways of taking a moment to check in with themselves amidst our connected lives

**Sesame Street  
Breathe, Think, Do app**



## "Shared Chaos"

Teens and Tweens feel that "TV" is made for adults and YT content, or at least what they see is made for and by young people. It's relatable it's in rawness pain as well as it's modernist construction

**Antonio Garza:  
NY Vlogging Piece**



# Self Care Everywhere

Anxiety and Depression have been increasing since the 90s.  
Kids are ready to talk.



## WHAT MATTERS TO KIDS?

- Acknowledgment of their feelings
- Resources and support
- Relatable content that reflects their emotional journey
- Content created by other young people
- Content that does not feel patronizing, "self-care" vs "mental wellness"

## HOW MIGHT CN SUPPORT POSITIVE MOVEMENTS TOWARDS SELF-CARE?

- Partnerships with companies that care about mental health, and giving parents confidence that CN is quality and supportive content
- SME behind our efforts
- Content where characters and other kids talking about feelings
- Create content (both viewable and interactive) that reflects the spectrum of feelings kids go through



# YOUNG ACTIVISTS

Grassroots has gone Digital and created IRL communities



# Young Activists

Grassroots has gone Digital and created IRL communities

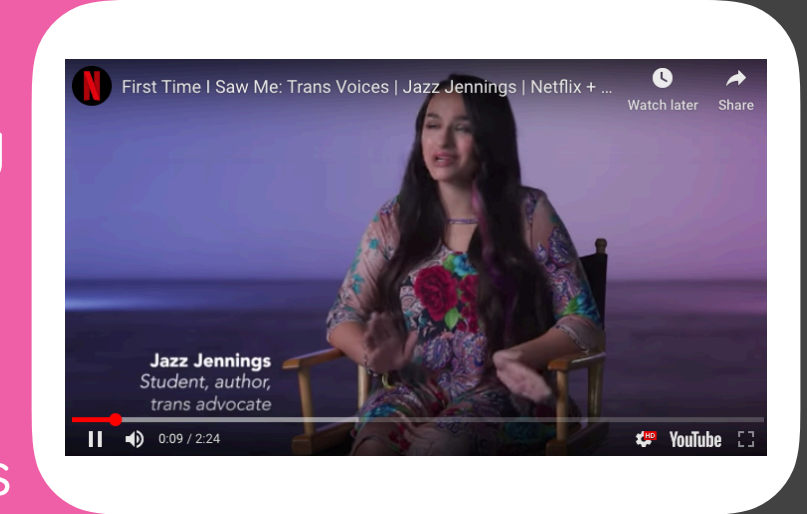
## Stats:

- More than **1.4 million young people** around the world **took part in school strikes for climate action** (The Guardian)
- During the 2016-2017 academic year, the **National Center for Education Statistics recorded 3,272 instances where kids brought guns to school.** (Everytown)
- **Black students with disabilities are almost three times as likely to experience out-of-school suspension or expulsion** as their white counterparts, and twice as likely to experience in-school suspension or expulsion, according to a **report** from the National Center for Learning Disabilities. (ADA)
- After Parkland Student Activism, **67 new gun laws were enacted by both Republican and Democratic legislators** in 26 states and Washington, DC, according to a **year-end report by the Giffords Law Center to Prevent Gun Violence.** (Everytown)

## "Kids Speak Up"

Young Adults like Jazz Jennings share thier journeys on line and TV to help other kids going through similar experiences . Jazz is active in the trans community and donates time and money to her cause

**Trans Youth Visibility**



## "Inspiring Action "

Young People like Greta Thunburg have inspired global action, encouraging kids to speak get engaged about their future.

**Greta Inspires Millions**



# Young Activists

Grassroots has gone Digital and created IRL communities



## WHAT MATTERS TO KIDS?

- Feeling Heard and Respected
- Authentic Action
- Seeing real people they love participating in causes they love (Rebecca Sugar LGBTQ rights)
- Supporting causes across our channels

## HOW MIGHT CN SUPPORT POSITIVE CAUSES THAT ENGAGE KIDS?

- Donations, Scholarships, and Participating in platforms that give kids a space to speak
- Telling empowering stories
- Committing to a cause (ex: visibility at PRIDE, partnership with young activists - everytown)
- Building out what CN environment looks like with kids for kids

The background is a dark gray color. In the top-left corner, there is a large, irregular purple shape. In the top-right corner, there is a small cyan circle. In the bottom-left corner, there is a large cyan arc. In the bottom-right corner, there is a large, irregular pink shape.

# MODERN FAMILIES

Millennial parents are more comfortable talking to about kids about previously "taboo" subjects.



# Modern Families

Millennial parents are more comfortable talking to about kids about previously "taboo" subjects.

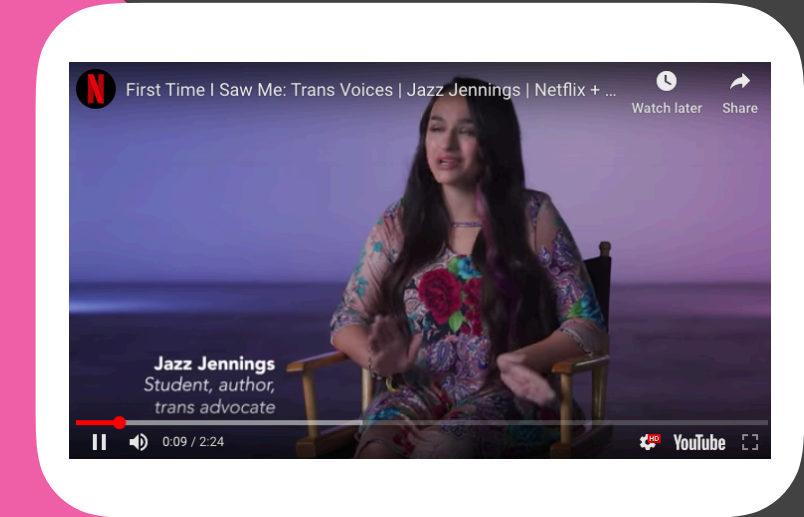
## Stats:

- **Eighty-one percent of Millennial parents have shared images of their children on social media**, compared to 47% of Baby Boomers parents. (PEW)
- **Millennials spend more time than any previous generation with their children. Fathers, in particular, are spending a lot more time** – 59 minutes a day – with their children than fathers spent with their children in the 1960s, when they averaged only 16 minutes a day of time spent parenting. (PEW)
- **Family Structure is open to interpretation:** between 2 million and 3.7 million children under age 18 have an LGBTQ parent, and approximately 200,000 of them are being raised by a same-sex couple. Many of these children are being raised by a single LGBTQ parent or by a different-sex couple where one parent is bisexual. (US Census)
- The American Pet Products Association (APPA) found that **68 percent** of U.S. households owned some sort of pet in 2016. Among those pets were about **90 million dogs and 94 million cats** (ASPCA). Americans spent \$72.56 billion on their pets.

## "A Family Like Mine"

Many shows feature gay characters to reflect our friends and families around us (AT, SU, Arthur etc). Shows like *And Mack* are making headlines by showcasing LGBTQ youth in starring roles.

**Changing the way we see families reflected**



## "Pet's are People too "

Families are spending billions on pets each year. Pets are part of our families and show up online, in family photos, and at events. Companies like Bark Box have created family pop-ups, themed holiday gifts and more.

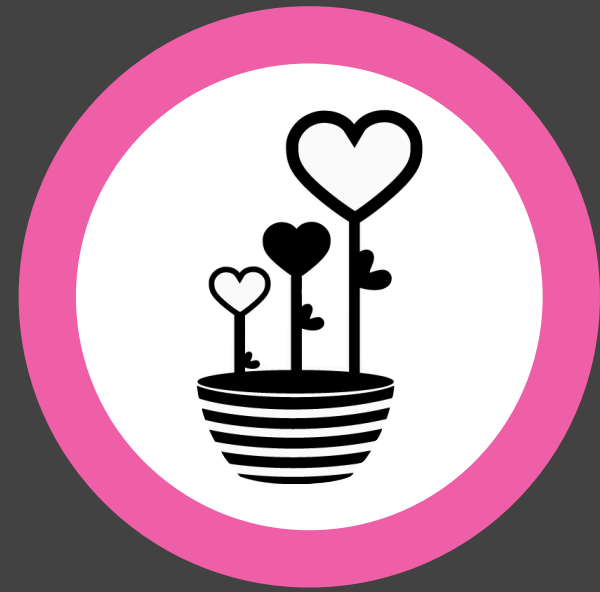
**Bark Box! Loves your dog**





# Modern Families

Millennial parents are more comfortable talking to about kids about previously "taboo" subjects.



## WHAT MATTERS TO KIDS?

- Agency in their school and family lives
- Seeing families like theirs reflected and celebrated
- The opportunity to talk about "tough" subjects
- Animals! Kids love their pets

## HOW MIGHT CN SUPPORT MODERN FAMILIES?

- Reflecting diverse characters and families in our content
- Reflecting unique family structures and celebrating what makes them unique
- Celebrating kids pets (carturday is doing well on CN IG)
- Inclusive family events and experiences
- Being experimental in our games, activities and digital spaces