

Children's trends in Europe

Barbie Clarke, Kids and Youth and Editor of *Young Consumers*, surveys trends in technology and toys and reveals what's hot among European children

LOOKING AT CHILDREN'S trends across Europe, it is fascinating to find that in many ways, children do not differ greatly between countries, although clearly there are cultural differences. While it is relatively easy to interpret quantitative data between countries, it can be invaluable to attend qualitative groups or in-depth interviews. This is for obvious reasons such as consistency in interpretation, and to develop the same themes, but it also helps to observe what is going on. Just noting the ways children dress, the colours they favour, the shoes or trainers they are wearing, the language they are using, gives a valuable insight into the differences, and similarities, among children in different countries. Equally, observing parents, the way they respond to their children, the degree of influence they have on purchase preferences, allows us to interpret a great deal while assessing the way in which trends are likely to develop across Europe.

Influences on trends

To keep abreast of the children's market, it is essential to monitor trends. But first it is important to understand the developmental stages of children. It is the bane of monitoring trends in the child and youth market that young children and youth are fickle, and what is in today will be out in a few months, or even weeks. But what *is* consistent is the way in which children develop, and it is interesting to note that these develop-

mental stages apply all over the world. A trend will only have impact on children and young people if it fits within their developmental stage. So fantasy and play is important to younger children, but older children are more likely to seek function in an object and acceptance among peers.

Play is an essential part of children's lives. All children are born with a basic need to play and explore. A newborn baby will respond to shapes, contrasting shades (in black and white), and noise; it will spend a long time studying faces. Playing, and toys, help children understand their world and explore different personalities. They use them to deal with troubling events, and mimic what they see adults do.

So if we are looking at what will appeal to young children, we must be aware that play, exploration and fantasy will have an important role.

Similarly we must be aware of the significance of family, siblings and peers in children's lives. Up to the age of three, it is safe to assume that mother, or the primary carer, will play the biggest part, with father also being important, if he is around. Other adults, not in the immediate family, begin to play a part as the child starts nursery and at the pre-school stage, up to five years. Until they start school children will be heavily influenced by the toys, games and clothes that their parents choose to give them.

From five, when nearly all European children are attending school full-time, clearly teachers

and friends begin to have an increasing influence on children's lives, although up to seven years, it will still primarily be family influence, including that of siblings, that dictates what children are likely to choose in terms of food, clothing, music and leisure activities. When children reach the 'middle age of childhood', from about seven years, peer pressure begins, and it is at this age that trends can begin to emerge from the playground, much to many parents' surprise.

So we can say that between the ages of three and 12, children are moving from an internal world to an external world. Young children are developing their imagination, their memory, their ideas and feelings. And they do this through forms of play that might involve well-known characters, dressing up, playing roles, and just being, not doing. As they get older, children increasingly become interested in places, things around them, and the people who inhabit their world. They may still play, but play will be about working out how things work, doing research through the internet, and of course physical activity. And it is this older age group, the middle age of childhood, or teenagers, aged seven to 12 years, that change the most in terms of their preferences, their adoption of trends and the influence they have on peers.

Children and technology

One of the trends that clients frequently wish to track on a regular basis is children and their use of technology. It is in this area that children's lives have changed most compared to those of their parents' when they were children. And it is extraordinary to find out just how much part of children's lives technology has become, and the extent to which they take new innovations for granted. Three years ago the BBC made a TV programme with me called *Trend Trackers*. In this the BBC were particularly interested to find out about technology, and how children responded to this. As part of the programme we

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ran some groups with children aged seven to eight years, and older children aged 12–13; both ends of the 'middle age of childhood' described earlier.

For part of the research, we asked children to talk about their opinions of mobile telephones. Although it is probably not a good idea for young children to have mobile phones for health reasons, they undoubtedly play an important part in the lives of older children in Europe. With older girls, we heard about the use they make of SMS, and the way they felt more comfortable, in many instances, with sending a text message rather than talking to their friends, especially if there was some conflict to resolve. This is something that is now well documented, not least among adults who are familiar with the concept of 'dumping by text'.

But what was most interesting were the younger children. We asked young boys of seven to eight to design their ideal mobile phone. They came up with some unique and innovative ideas, and we were all amazed at their level of creativity. Looking back now, some of their ideas were almost prescient. They came up with some cool ideas, such as sweet and drink dispensers from the mobile, but they also thought of hands-free telephony, watching TV, listening to any music

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Table 1 Which of the following do you have in your bedroom for your own use? (%)

	All	UK	France	Germany	Spain
Radio	52	47	58	61	42
Music system	47	57	37	49	46
TV	44	68	28	40	42
Nintendo/PlayStation/X-Box	36	46	27	31	41
PC/laptop	29	23	28	29	37
VCR	23	44	12	18	19
Mobile phone (no camera)	20	25	12	24	18
DVD player	18	31	8	18	15
Internet connection	12	7	9	10	21

Source: Kids and Youth Eurokids 2004

they wanted (think MP3 and iPod), seeing films, and taking photographs. The extraordinary thing is that now these things are all possible (well, not the sweets or drink dispenser), but three years ago only the most informed knew about 3G and bluetooth, or had any notion that these would be highly possible. An example perhaps of how quickly the industry moves on, but how children, open to ideas and not alarmed by technology, can embrace new ideas.

The Aladdin's cave of the bedroom

We know that children view their bedrooms as a source of comfort and autonomy; a place where they can 'chill out' away from the rest of the family. One of the ways that we can track what technology children are using is to find out what technology they have in their bedrooms. If we look at ownership of mobile phones across the 'big four' European markets – the UK, France, Germany and Spain – we find that overall one in five children aged from five to 12 years has a mobile phone. If we break this down we find that the UK leads the way with 25%, followed by Germany at 24%. Spain comes next at 18% and France is lower at 12%. (source: Kids and Youth Eurokids Research).

There has been much debate recently about the level of inactivity of children in Europe, and the part that technology is playing in keeping

them from going out and exercising. Many are linking this reluctance to leave the home, or the bedroom, with the crisis in childhood obesity levels that is emerging globally. We should remember that it is of course the case that parents are often reluctant to allow their children to go out, because of concern about danger, both from 'stranger danger' and increased road traffic.

There is also perceived to be a link with children being exposed to television advertising for food and drink that may be encouraging them to become obese. And it is interesting to consider the exposure children have to television. Again, looking at what children in Europe have in their bedrooms is revealing; clearly if a television is in a child's bedroom, they may be exposed to content unsupervised by parents. Overall, we find that 44% of children in the 'big four' countries (UK, France, Germany and Spain) aged five to 12 have a television in their bedrooms. However, if we break this down, we find that this counts for over two-thirds (68%) in the UK, and well over a third in Germany (40%) and Spain (42%). In France, where although there is concern about childhood obesity, actual levels appear to be lower, only just over a quarter (28%) of five to 12 year olds have a TV in their bedrooms.

Another major impact on TV viewing will be the ability for children to watch cable or satellite TV. Overall across the four big European countries, one in 10 children has access to this, but

Favourite toys for boys and girls (three to eight years)

	BOYS	GIRLS
Three to five years	Scooby Doo Football Hot Wheels Spider-Man Power Rangers Thomas the Tank Engine Teenage Mutant Ninja Turtles LEGO	CBeebies Leap Pad Scooby Doo Princesses Dressing up Colour - pink Barbie Art stuff Drawing/making
Five to seven years	Scooby Doo Game Boy Football Hot Wheels Spider-Man Board games Power Rangers The Simpsons Yu-Gi-Oh/Pokémon/Jackie Chan cards Scalextrix Thunderbirds	Bratz Magic Sand Bicycle Scooby Doo Baby Born/Princess Baby Baby accessories Girls World Colours - pink, purple, lilac Karaoke machine Art stuff Dressing up clothes - Snow White, Cinderella
Seven to eight years	Pokémon/Yu-Gi-Oh cards PS2/X Box PlayStation games - <i>Grand Theft Auto, Bloody Raw 2</i> The Simpsons Skateboard Video Now Musical instruments - drums, guitar Scooby Doo BMX bike SpongeBob SquarePants	Bratz SpongeBob SquarePants The Simpsons Game Boy Hammerbeads Beyblades Tamagotchi Art stuff Pokémon/Yu-Gi-Oh cards Making cards Scooby Doo Funky Friends

Source: Kids and Youth Eurokids 2004

the numbers vary immensely by country, and are growing all the time. Numbers of children with access to cable satellite TV in their bedrooms are highest for Germany, where a quarter of children (25%) have access. In Spain this is 8%, in the UK 4% and in France just 2%.

We have also heard frequently about the effects of computer games on children and their level of activity. Personally, I feel there should be

more concern about the content of many games children are exposed to, rather than the fact that they are playing games, as opposed to sport or taking physical activity.

Across the big four European countries, we find that over a third of children (36%) have a means of playing games in their bedrooms (Nintendo, PlayStation, X-Box). Once again if we break this down, nearly a half of UK children

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(46%) have a means of playing games in their bedrooms. This compares to 41% of Spanish children, 31% (under a third) of German children and only just over a quarter of French children (27%) having a 'computer game' in their bedrooms.

Owning a laptop or PC is a big trend among children in Europe, and overall over a quarter of children aged five to 12 claim to have one in their bedrooms. If we break this down by country, Spain leads the way with well over a third (39%) of all Spanish children having their own laptop or PC in their bedroom. Germany follows at 29%, France at 28% and the UK is last at under a third (23%) of children having a PC or laptop in their bedrooms.

Perhaps what we should all be most aware of is the ability for children to access the internet. Mostly I find that parents in Europe are well aware of the potential dangers of the internet for their children, but see it, when regulated, as an invaluable tool. Overall, in the big four countries, just over one in 10 children is able to access the internet through links in their bedrooms; often this is of course through wireless connection in their homes. Once again, leading the way in this is Spain, with one in five (21%) claiming to be able to access the internet in their bedrooms. This contrasts with one in 10 in Germany (10%) and France (9%), and 7% in the UK.

DVD players have become big business, with a major retailer in the UK announcing that they will no longer supply video recorders/players, only DVD players. Overall, the number of children in the big four European countries aged five to 12 claiming to own a DVD in their bedroom is nearly one in five (18%). The figure is highest in Germany (18%), then Spain (15%), but less in France (9%) and the UK (7%).

What's 'hot' for children now?

Three to eight-year-olds?

Having looked at technology, we also monitor 'what's hot' around Europe. There is a remarkable similarity across countries, mainly because chil-

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dren are of course exposed to very similar programming through children's channels such as Nickelodeon, Jetix and Cartoon Network. Celebrity and sport still continue to have an influence, with girls being keen on musicians and singers, and boys (up to seven) on footballers. Interestingly after this age there are gender similarities in what both girls and boys like in terms of music, bands, singers, film stars and sports personalities.

Scooby Doo and SpongeBob SquarePants have been the two characters that have made most impact over the last year with young boys. Collecting and swapping is always popular with children, and for boys Yu-Gi-Oh cards continue to play a part, as well as Pokémon and Jackie Chan cards. Older boys (seven years plus) continue to take a great interest in the latest PlayStation games, and the biggest 'wish for' item at Christmas was an iPod. Most children under 11 do not necessarily aspire to have a mobile phone any more, mainly because of the fear of being attacked and having it stolen. However, the majority believe that at 11 they are likely to be given a mobile by their parents.

Generally there is a move away from the very 'girly' look of the last few years. For girls, Barbie dolls are definitely on the wane, with the edgier Bratz and My Scene dolls becoming most popular. Although many young girls continue to own a large number of Barbie dolls, they mostly claim not to be interested in collecting them any more.

Along with the growing demise of Barbie is a move away from 'pink'. Walk into any clothes or toy shop for young girls a year ago, and all you could see was pink. Now girls from about five are beginning to eschew pink, describing it as a 'baby' colour, opting instead for purple or lilac, or even primary colours.

Girls may be becoming less 'girlie', but they do still like to nurture. Baby Born dolls and their ilk are still popular up to seven years. The wish to care and nurture also goes some way to explaining the lasting popularity of Tamagotchi, the virtual reality pet, and the website Neopets, which claims to have 70 million virtual pets being cared for across the world. Girls across Europe are very keen on art and craft, and the possibility of making things that can be used in their rooms. No doubt this has been influenced by the various TV 'make over' programmes that have been popular in Europe.

Tweenagers (eight to 12 years)

If we look at older children, the tweenagers referred to earlier, we find an altogether older mindset, especially in the UK. Interestingly children in the UK do seem to remain 'young' for a shorter time than children in Spain, France or Germany.

But this age proves to be a difficult age to market traditional 'children's' products to, regardless of the country. They are too old in many cases for toys, but obviously far too young to do the more adult things their older siblings do, like go out without parents to the shops or park. It is a very distinctive age group that needs careful and separate targeting.

Interestingly, the teenage lifestyle is not always aspired to by this age group, who look at their older brothers and sisters, and see relationship problems, spots and hormones. Some marketers believe that younger children always aspire to be older, but this is a mistake.

Generally at this age children's music tastes are developing and becoming more diverse, and their interest in celebrity increases. They become

far more advertising and marketing savvy.

Tweenagers' bedrooms become the technology-filled Aladdin's caves referred to earlier; they will have everything that is going if possible, especially computer games and music. It is at this age that clothing brands become more important; wearing the wrong brand can be social suicide, especially after 10 years old.

Although it is a relatively care-free age, tweenagers do worry about going out. Both girls and boys are concerned about 'stranger danger', mainly because they have been exposed to the horrors of child abduction on TV, and boys worry greatly about being bullied by gangs of other boys.

Why track trends?

Tracking trends across Europe teaches us that there are many similarities among children, some of which I have looked at in this article. It is important and necessary, though, to look at the minutiae of the trend tracking that comes from individual countries. There are differences, as we saw with the ownership of technology in the bedroom, that will affect marketing plans for individual countries. But above all we must remember that children grow and develop in distinct ways that must be taken into account when we are predicting what will be the next 'hot' trend. Boys and girls are different; girls will cross the gender divide sometimes, but boys will not, and they are influenced by their parents, as well as their peers. Their lives are very different now from the lives of the adults who market to them, thanks to technology, but they still want to have fun and enjoy being children. Tracking trends reminds us just what the similarities and differences are.



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