

Top Favorite Brands & Licenses in France

France – May 2020



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The BrandTrends Suite provides licensors, agents and licensees with a full check on the relative awareness, popularity and merchandise appeal of all the leading Entertainment Brands & Characters among infants, preschoolers, children, tweens and young adults.

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OBJECTIVE & METHODOLOGY

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TOP LICENSES IN FRANCE

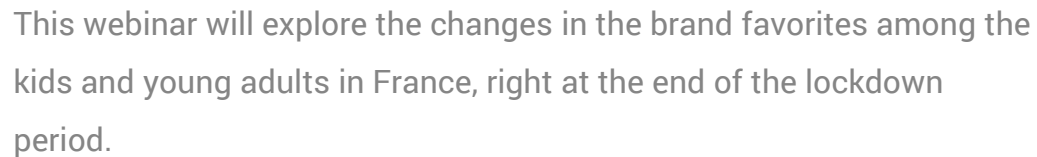
02

THE PERIOD IN LOCKDOWN

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IMPLICATIONS

What's in the session for today!



What happened in the world of the kids that would explain the trends seen in their favorite brands? And how marketers can use this information to leverage their strengths for more licensing sales?

Before we start: About BrandTrends

The BrandTrends Suite:

	SERVICE	DESCRIPTION
	BrandTrends Entertainment	In-depth dive into the relative awareness, popularity and merchandise appeal of the top 30 leading entertainment brands among people 0 to 25-year-olds. 
	BrandTrends Shows & Series	Track the relative awareness, popularity and merchandise appeal of the top 30 leading TV Shows & Series among people 0 to 25-year-olds.
	BrandTrends Sports	Assess the relative awareness, popularity and merchandise appeal of the top 30 leading sport brands among people 7 to 25-year-olds.
	BrandTrends Social Influencers	Uncover the efficiency of the social influencers – from popularity to efficiency on purchases - among people 10 to 25-year-olds.
	BrandTrends Forecasting	Predict the popularity, and thus the merchandise appeal, of the Entertainment brands 2 years ahead of time.
	MyBrandTrends	Create your own track of the relative awareness, popularity and merchandise appeal of your selected industry among a specific demographic target.

The survey is constructed to ascertain the most popular brands within each age group and gender and their merchandise appeal

GEOGRAPHY

France

Nationwide

Each state/region is proportionately represented based on population size to provide a representative sample for the country.

FR

DATA COLLECTION

Web interviewing. Selected panelists are sent an email containing an introduction text and a link to the survey. Clicking on this link launched their survey.

For infants and preschoolers, the parent is the respondent on behalf of a nominated child.

@

FIELDWORK

	Boys N=.	Girls N=.
0-2 Years old	160	160
3-6 Years old	160	160
7-9 Years old	160	160
10-14 Years old	160	160
15-25 Years old	160	160

Data was collected from April 30th to May 15th, 2020.

N = 1,600

THE PERIOD IN LOCKDOWN

France - May'20

Kids 3 to 25 years old



**Suddenly,
the world
unfolds
under their
feet!**



Cave-in – Place de l'Alma, Paris – November 08, 1915

Kids' lives drastically changed

No more ...



~~School~~



Meaning no more intense interactions with friends, less socializing, forced to adopt eLearning



~~After-school activities~~



Meaning less interactions as well as less 'energy spent'



~~Sports Entertainment~~



More free time



New social rules

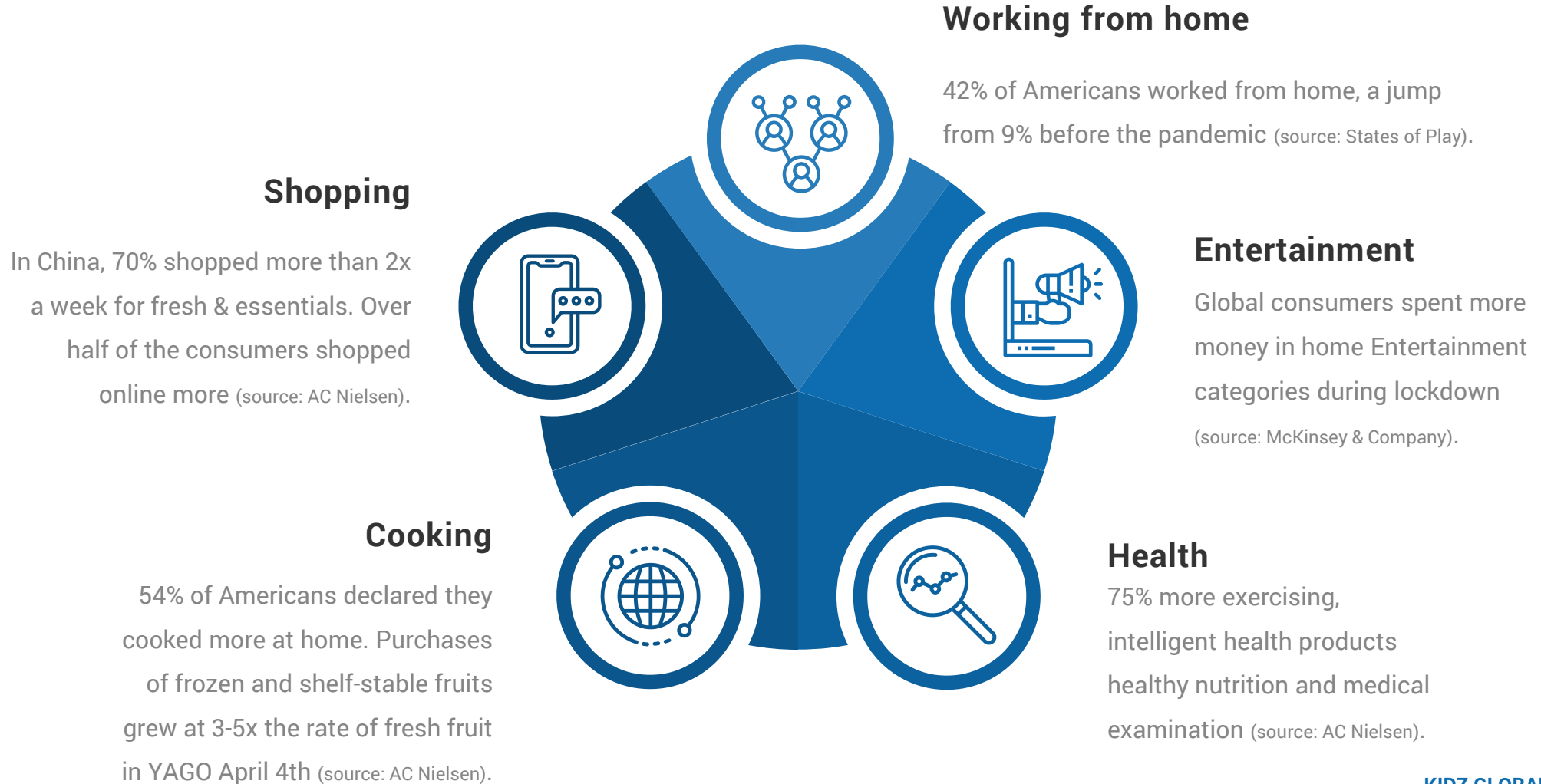


A whole new world to grasp, forced to change their behaviors!

As well as: 3 meals a day + snacks @ home, 100% time with parents for many, no more activities with grand-parents, live in a confined space, no more birthday parties, struggle to spend time with the other parent (when separated) ...

Lockdown redefined parental lives as well

Different needs, new occasions ... and these impacted kids too



1

**Kids had more free time
by themselves**

Amplification of individual Entertainment activities

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2020

France

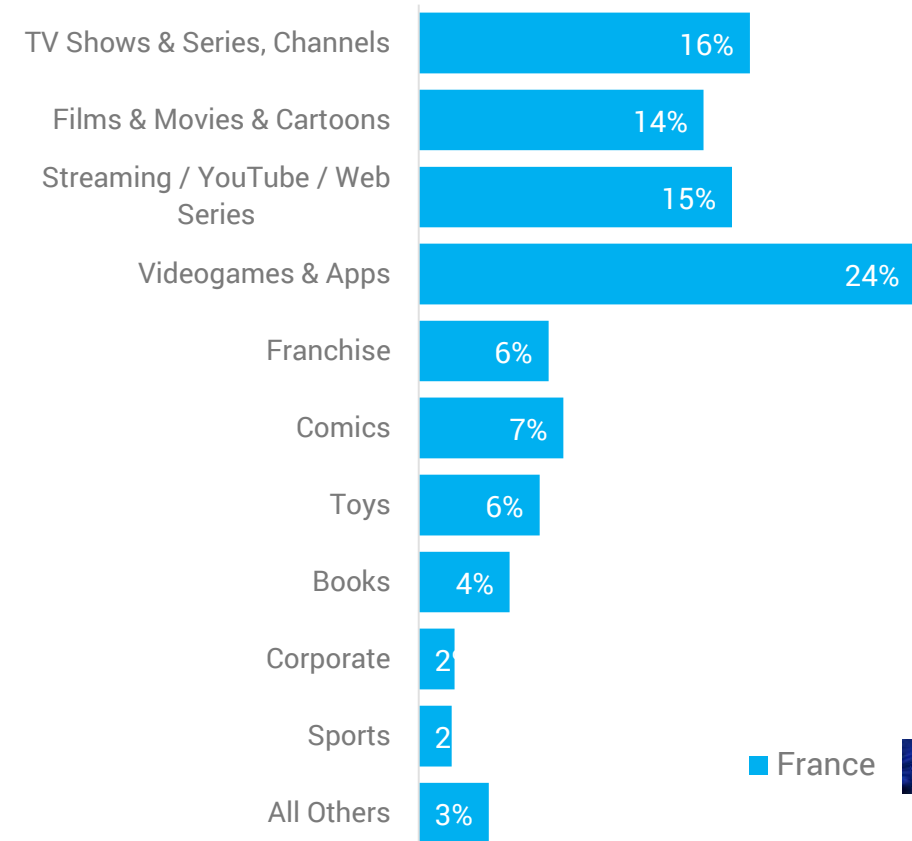
... from the brands they discovered

88%

Of the discovered brands

- TV Shows & Series, Channels
- Films & Movies & Cartoons
- Streaming / YouTube / Web Series
- Videogames & Apps
- Franchise
- Comics
- Books

Videogames & Apps , TV Shows, Series & Channels then Streaming dominate the genres



France 

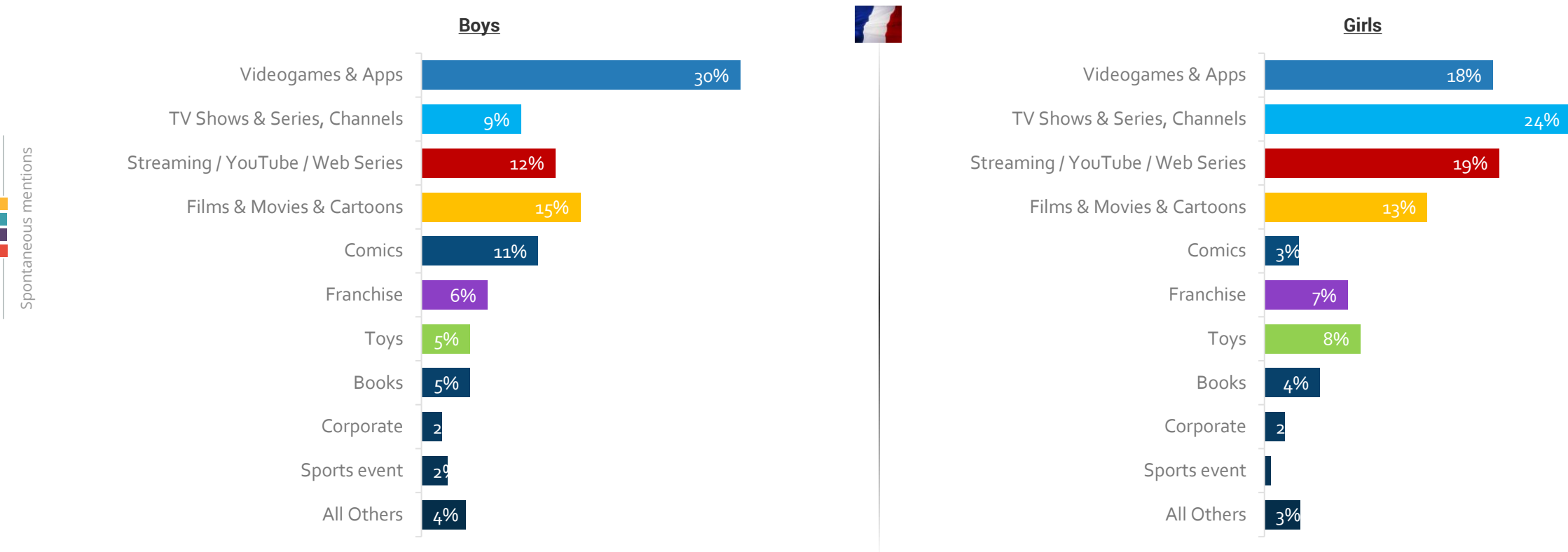
Videogames & Apps for the boys, TV sources for the girls

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Comics have been a strong choice for boys.

Discovered Brands – Categories by Gender – Spontaneous Mentions – 3 to 25 years old



2

Parents dedicated more time with their kids.

First, it's about learning and teaching; second, it's about bonding; third, it's about playing.

3

**Kids discovered many
Entertainment brands**

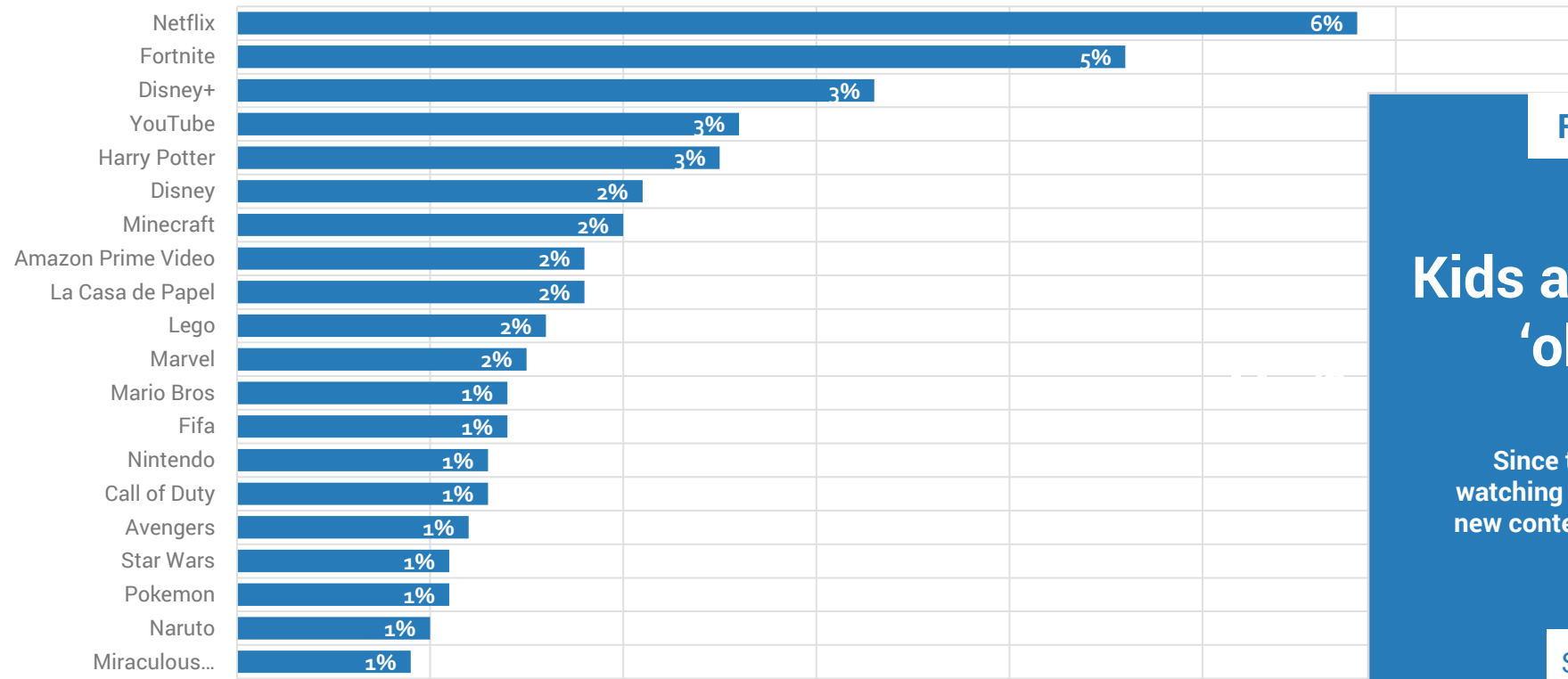
It's all about streaming and videogaming

The content provider have been used at length

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Discovered Brands – Spontaneous Mentions – 3 to 25 years old



Note: The 'Disney' brand as declared by respondents is more likely to contain significant proportion of 'Disney+' intentions

FIRST RELEASE

**Kids also discovered
'old' content**

Since they increased their time
watching and using, they extended to
new content ... that was long existing!

SCREENS & TOYS

Spontaneous mentions

4

**Relationships with
brands have changed**

Kids over-consumed Entertainment content in a short period of time

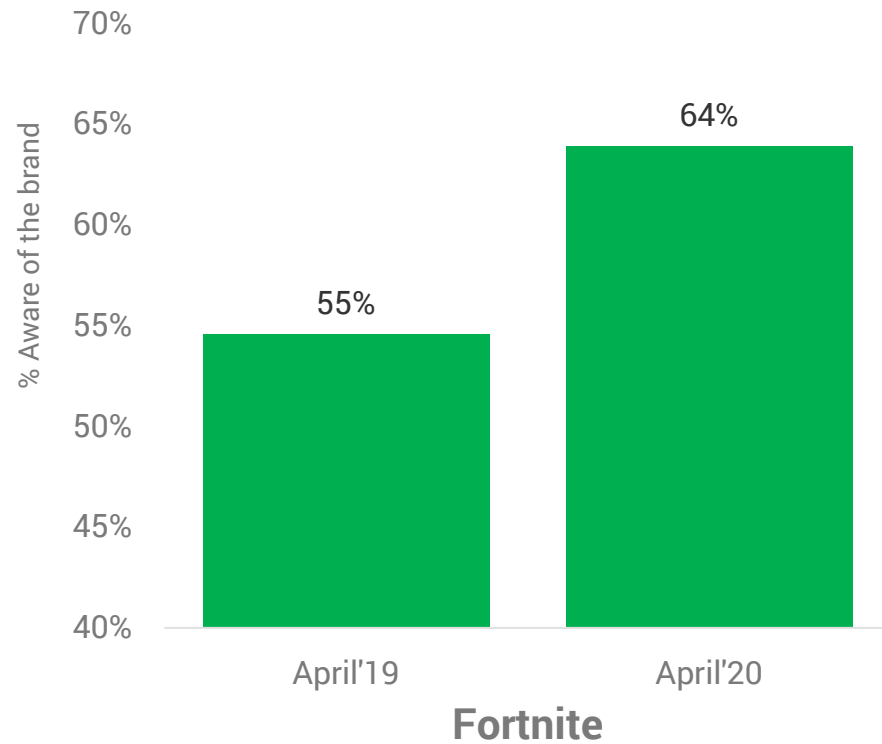
April
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France

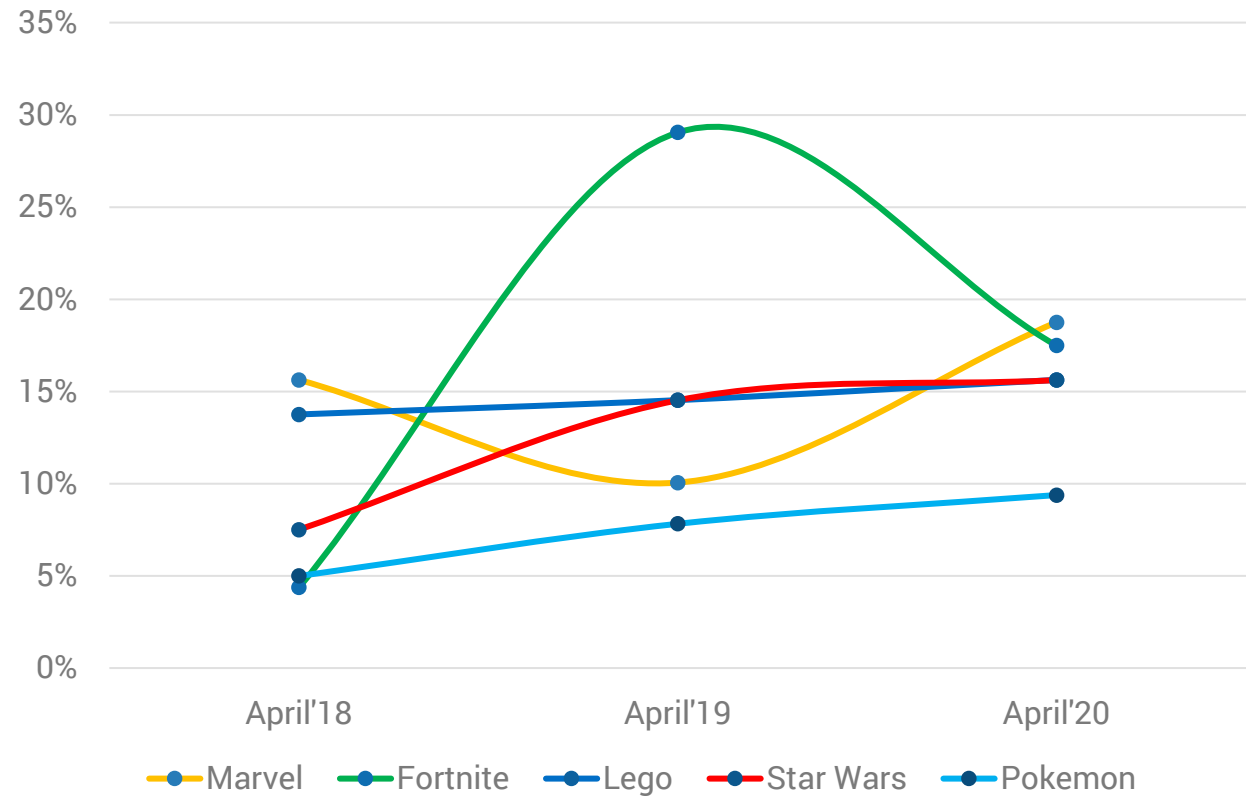
The Fortnite case

Although still well appreciated (and gaining), and significantly discovered / used, the brand shows some affinity fatigue

Attitudes (top box) towards the brand – Boys 10 to 14 years old



Top favorite brands – Spontaneous Mentions – Boys 10 to 14 years old

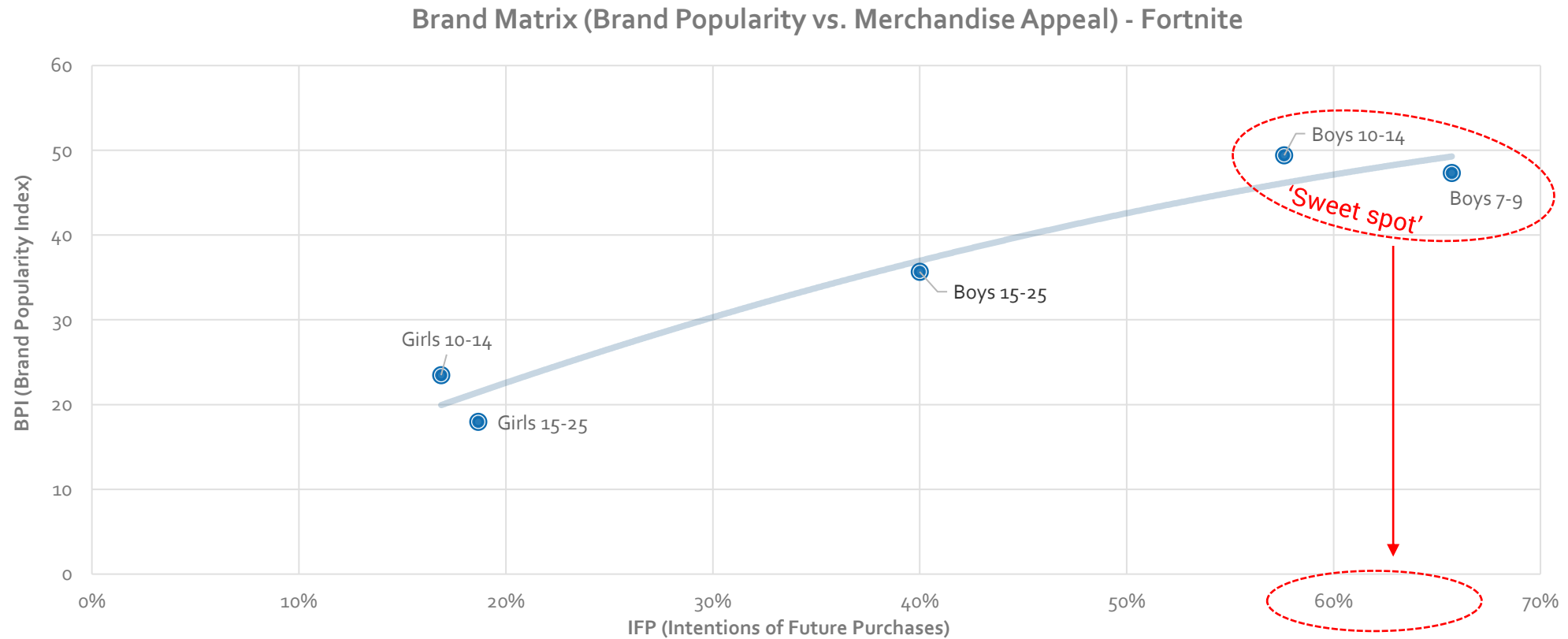


To increase in sales intentions, the brand must maintain popularity

... and we know popularity is a function of awareness and brand affinity

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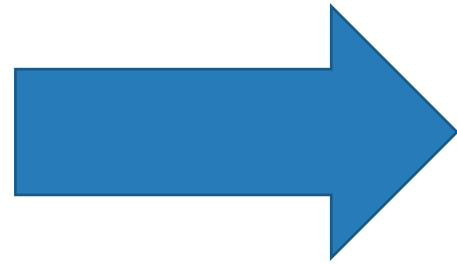
→ So a decrease in brand favorite ranking will drive to a decrease in popularity index; this will consequently drive to a lower purchase intention proportion!



Top Licenses in France

From this point in the presentation

This is how we collected the data driving to these insights



What is your favorite **cartoon**?

What is your second favorite **cartoon**?

What is your third favorite **cartoon**?

The mentioned License
belongs to the top 3
favorite brands of the
respondent

The French market in a few numbers

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1,758

Licenses

French kids up to 14 years old can mention a wide scope of brand names

+319

vs. April'19

An increase of +22.20% in a year: Straight impact of the lockdown!

1,090

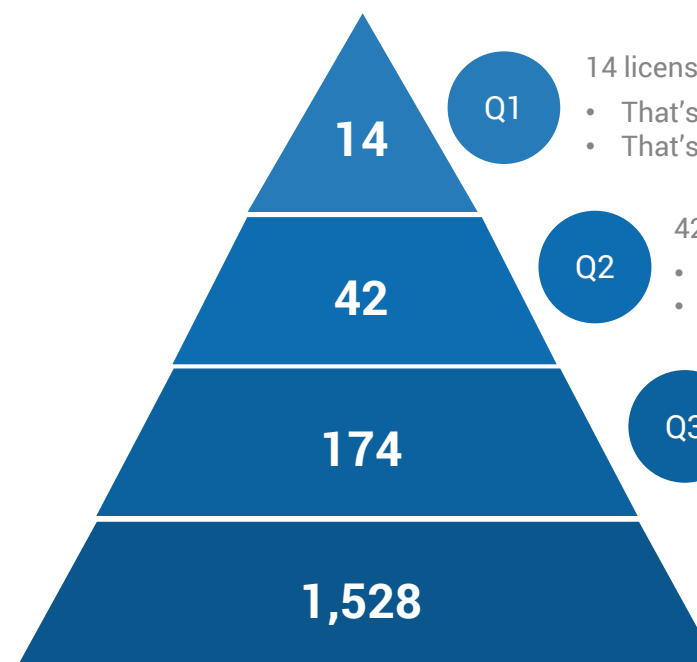
Licenses for Boys

That's an increase by 16.10% in the year.

1,224

Licenses for Girls

That's an increase by 20.95% in the year



Q1

14 licenses make 25.7% of the mentions.

- That's 1% of all mentioned licenses.
- That's also 1 more name vs. April'19.

Q2

42 licenses make 25.2% of the mentions.

- That's 2% of all mentioned licenses.
- That's also 7 more names vs. April'19.

Q3

174 licenses make 25.0% of the mentions.

- That's 10% of all mentioned licenses.
- That's also 44 more names vs. April'19.

Q4

1,528 licenses make 24.0% of the mentions.

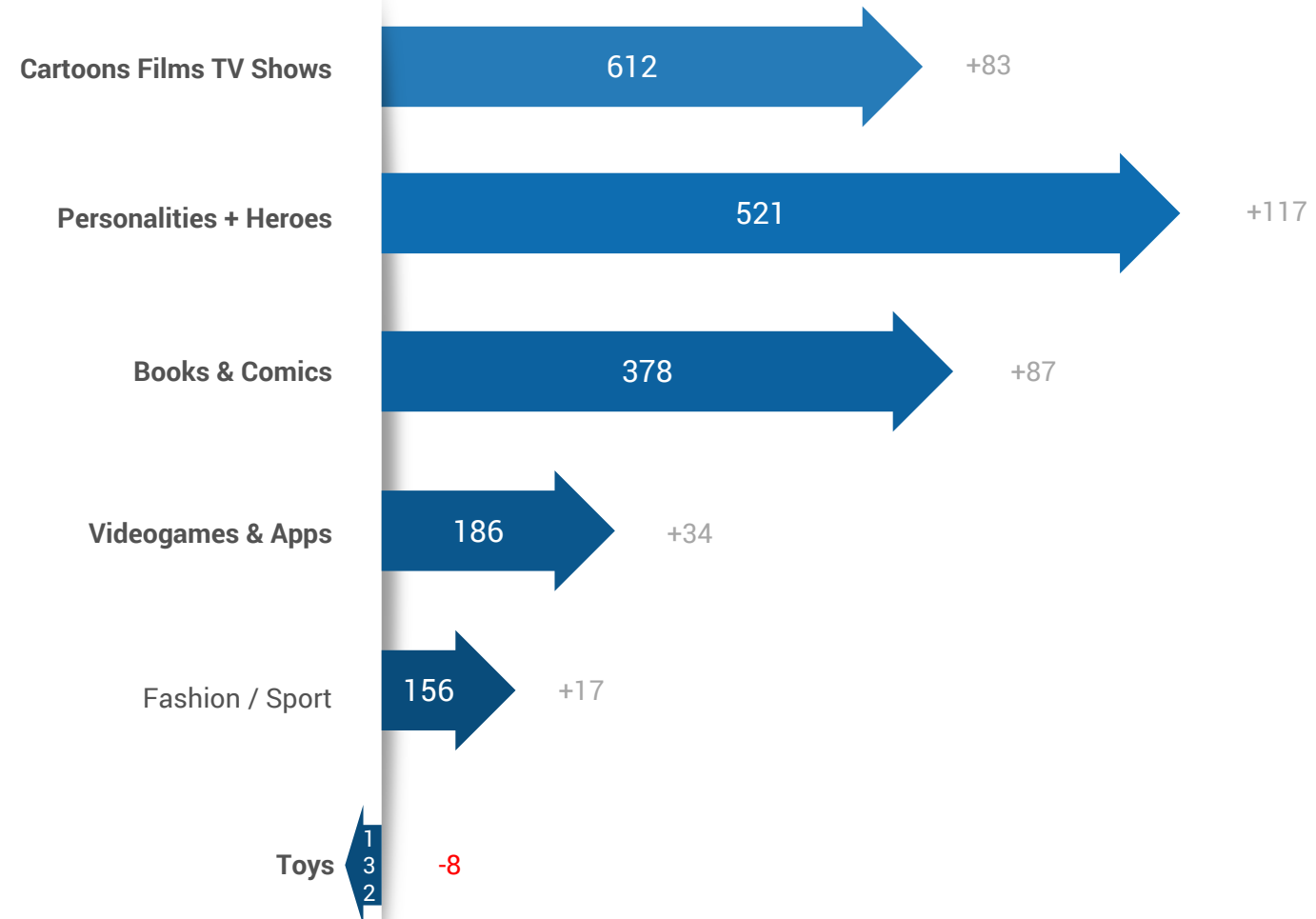
- That's 87% of all mentioned licenses.
- That's also 267 more names vs. April'19.

Robust growth in the number of names kids can report

Watching TV as well as surfing on the Net drove to a strong push in celebrities

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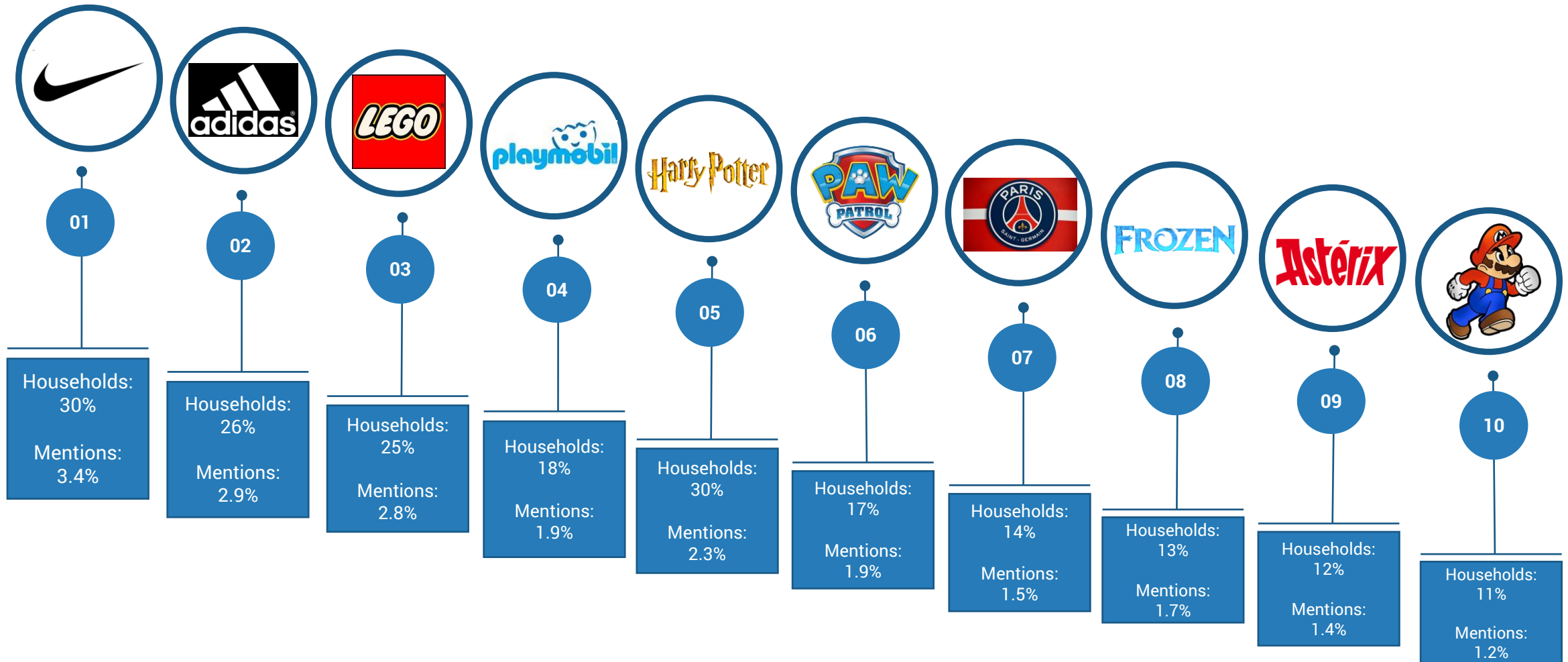
Top 10 Licenses

0 to 25 years old

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Spontaneous mentions



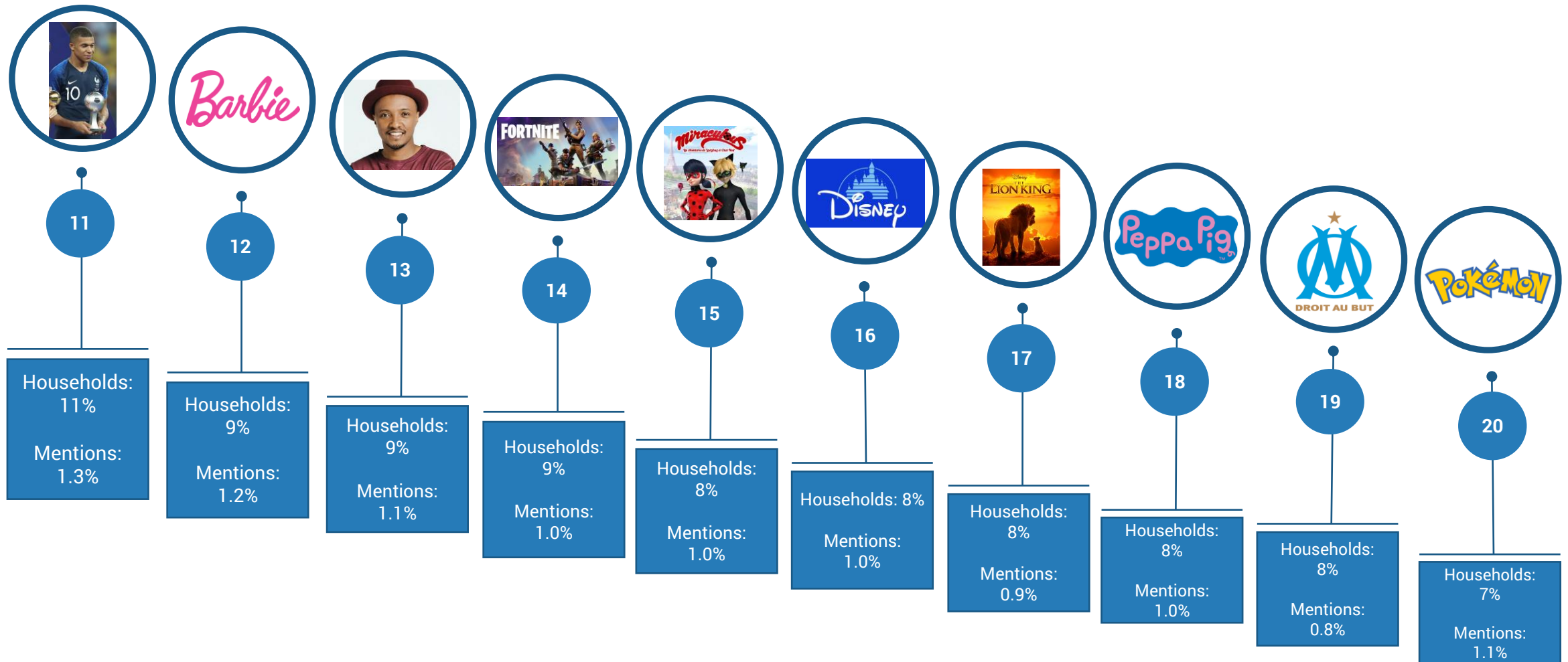
Top 11 to 20 Licenses

0 to 25 years old

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2020

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Spontaneous mentions

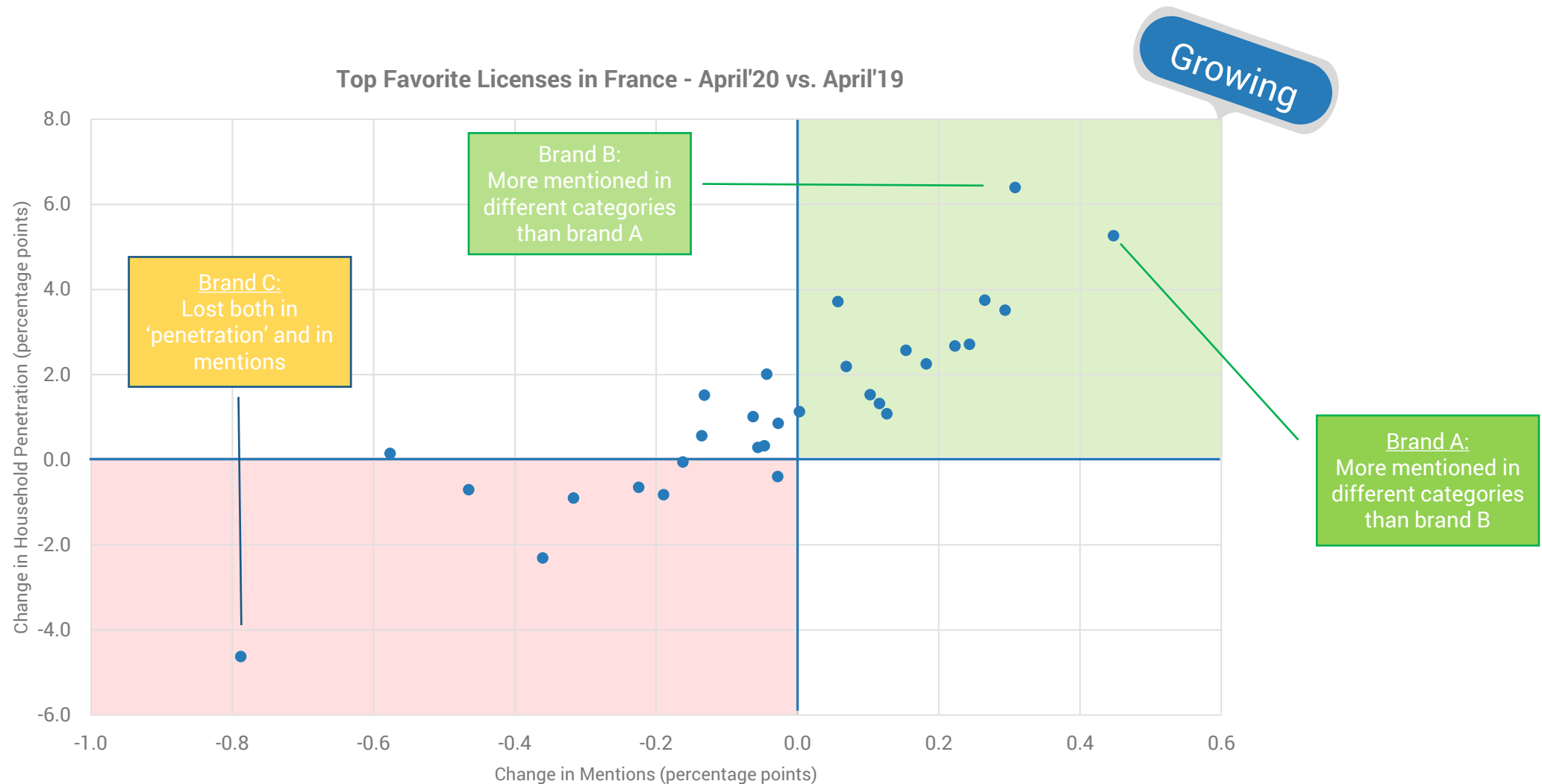


In the next slides

How to read?

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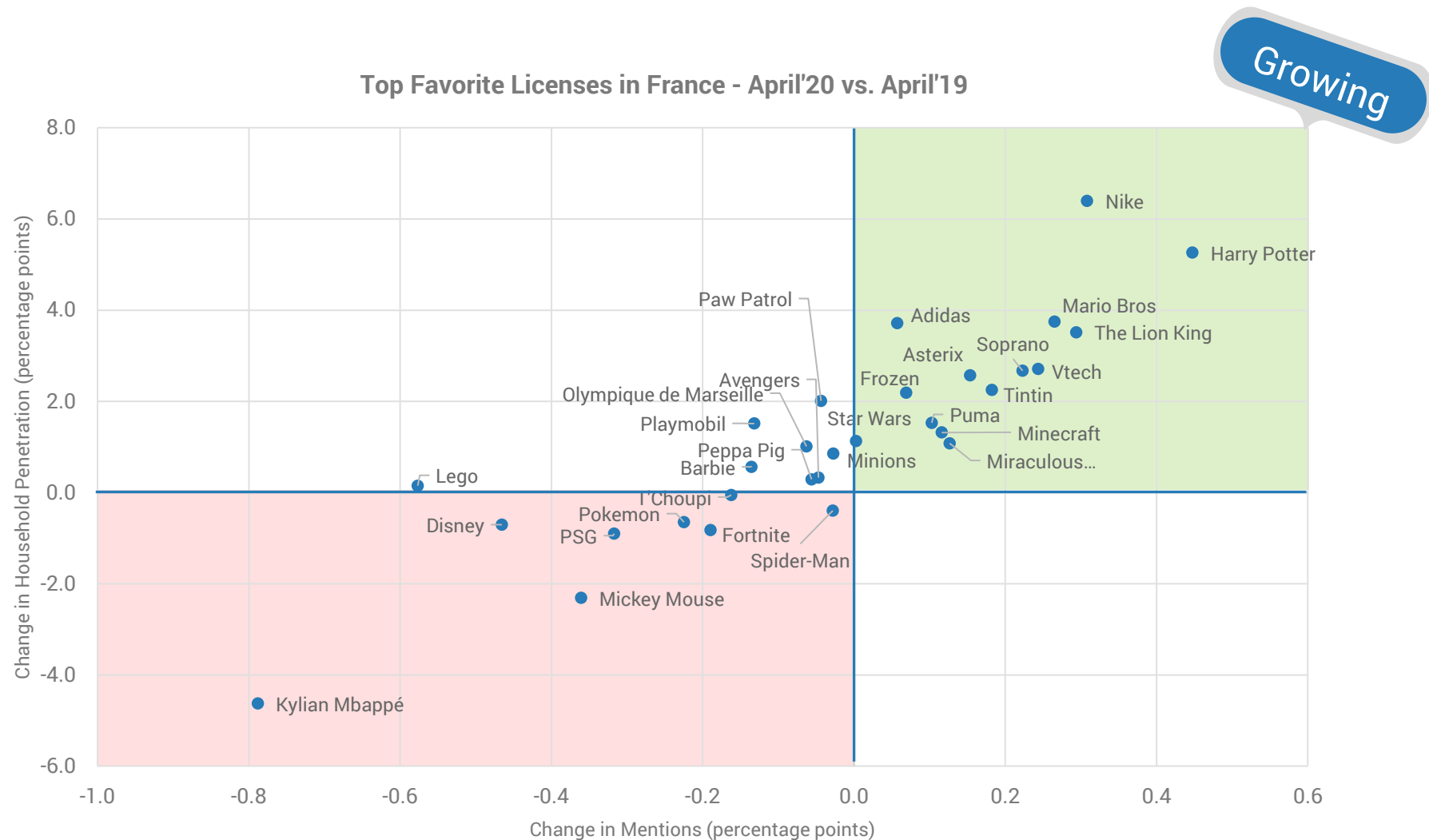


And the winners are ...

Top 30 favorite licenses

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Spontaneous mentions

And the winners are ...

Top 30 favorite licenses in Cartoons Films TV Shows

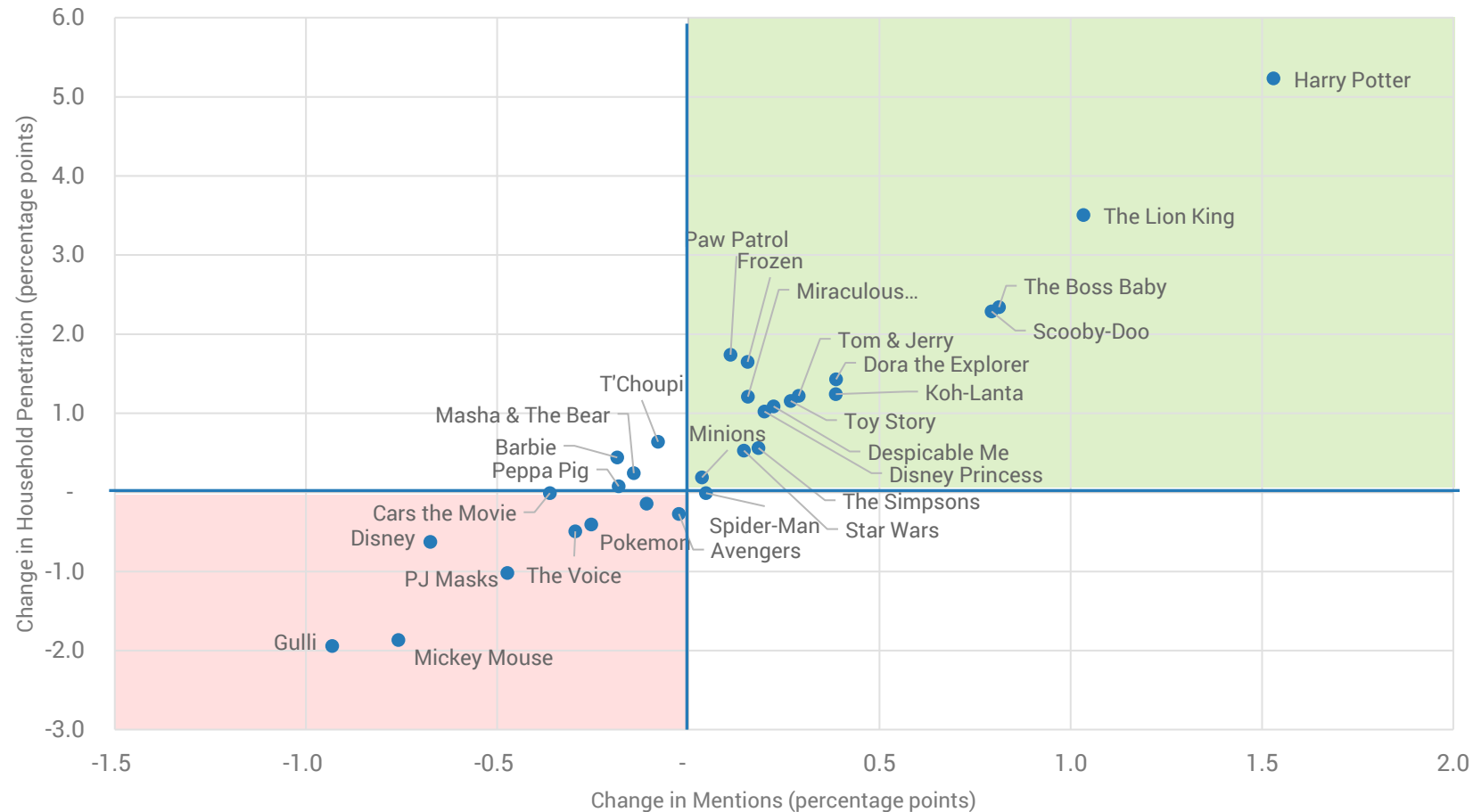
Top 50 licenses:
62.6% of the mentions
vs. 64.2% a YAGO

Among the new names:

- Tous en cuisine
- Les visiteurs
- Okko

Spontaneous mentions

Top Favorite Licenses in France - April'20 vs. April'19



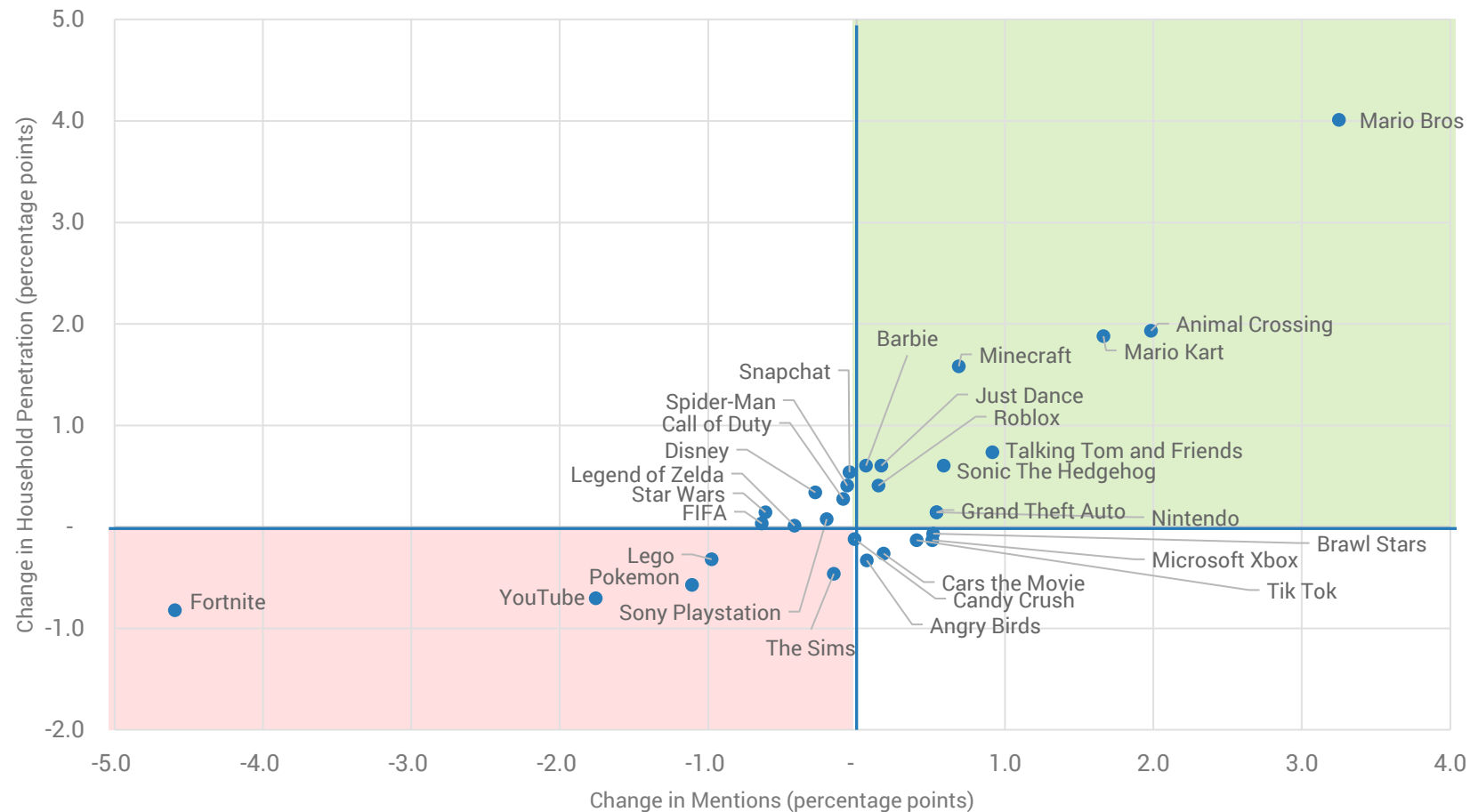
Source: Kidz Global, BrandTrends May 2020

And the winners are ...

Top 30 favorite licenses in Videogames

Top 50 licenses:
83.0% of the mentions
vs. 84.6% a YAGO

Top Favorite Licenses in France - April'20 vs. April'19



Spontaneous mentions

Dominated by Lego and Playmobil, the winners are ...

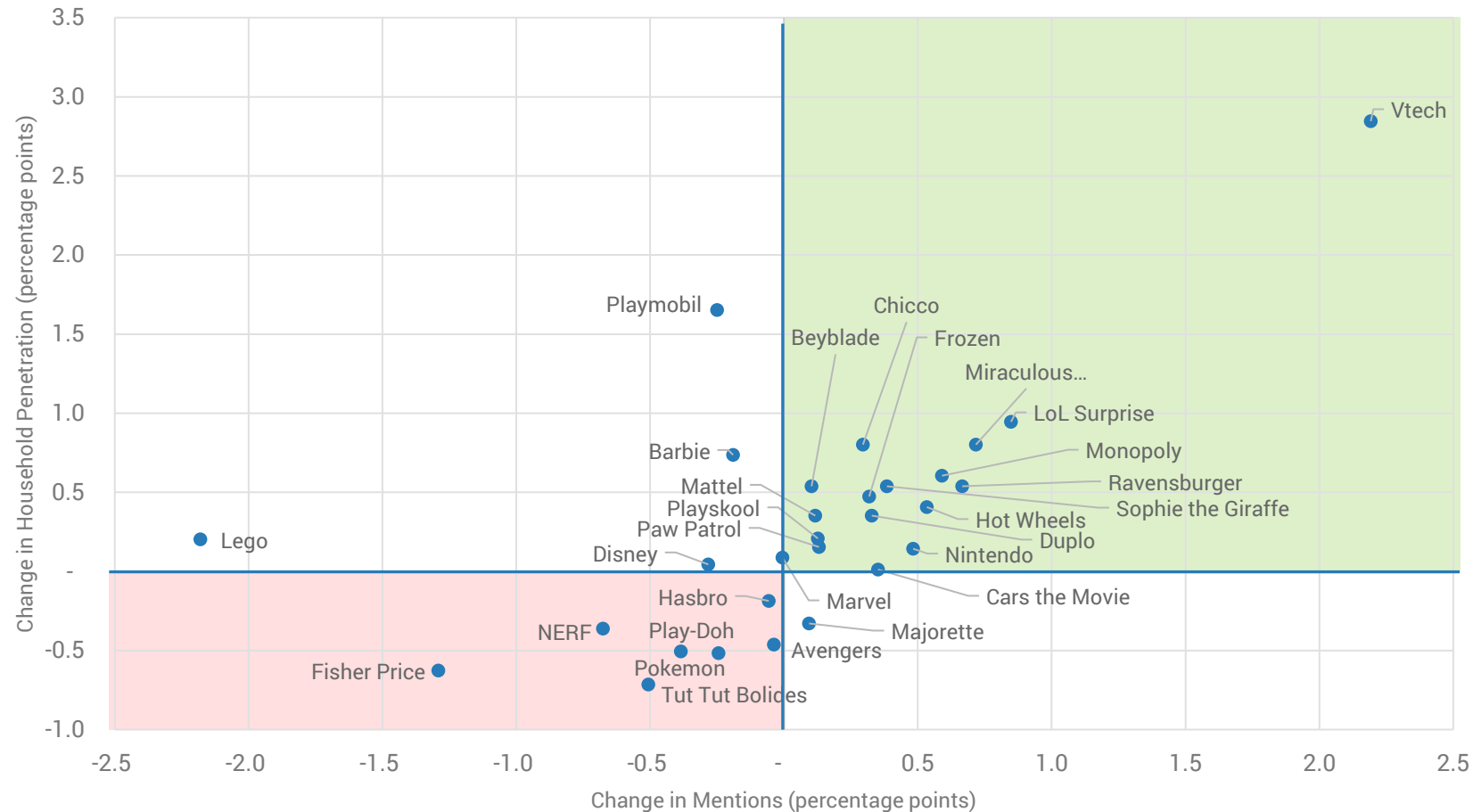
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Top 50 licenses:
91.0% of the mentions
vs. 91.8% a YAGO

Top 30 favorite licenses in Toys

Top Favorite Licenses in France - April'20 vs. April'19



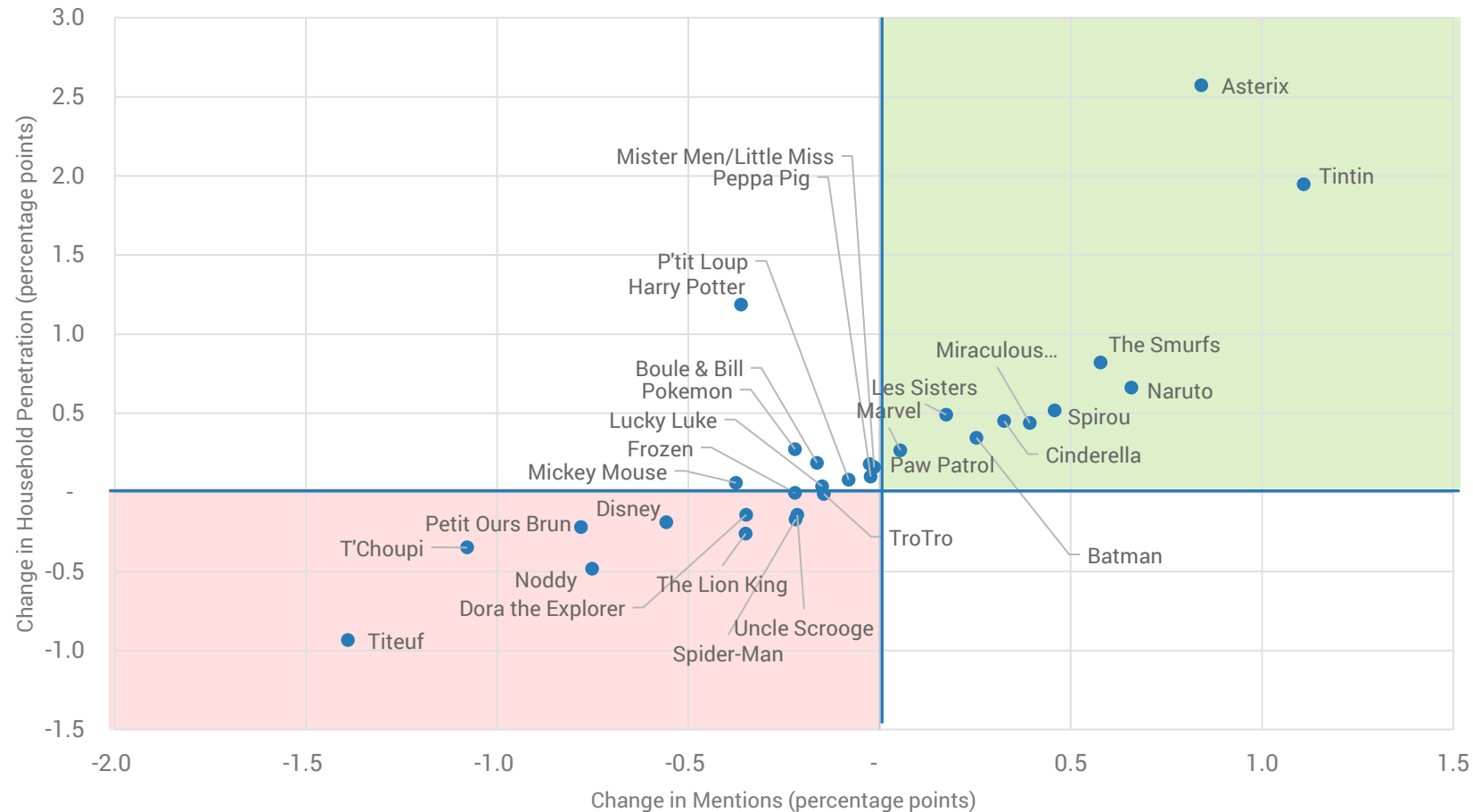
Source: Kidz Global, BrandTrends May 2020

And the winners are ...

Top 30 favorite licenses in Books & Comics

Top 50 licenses:
65.8% of the mentions
vs. 72.6% a YAGO

Top Favorite Licenses in France - April'20 vs. April'19



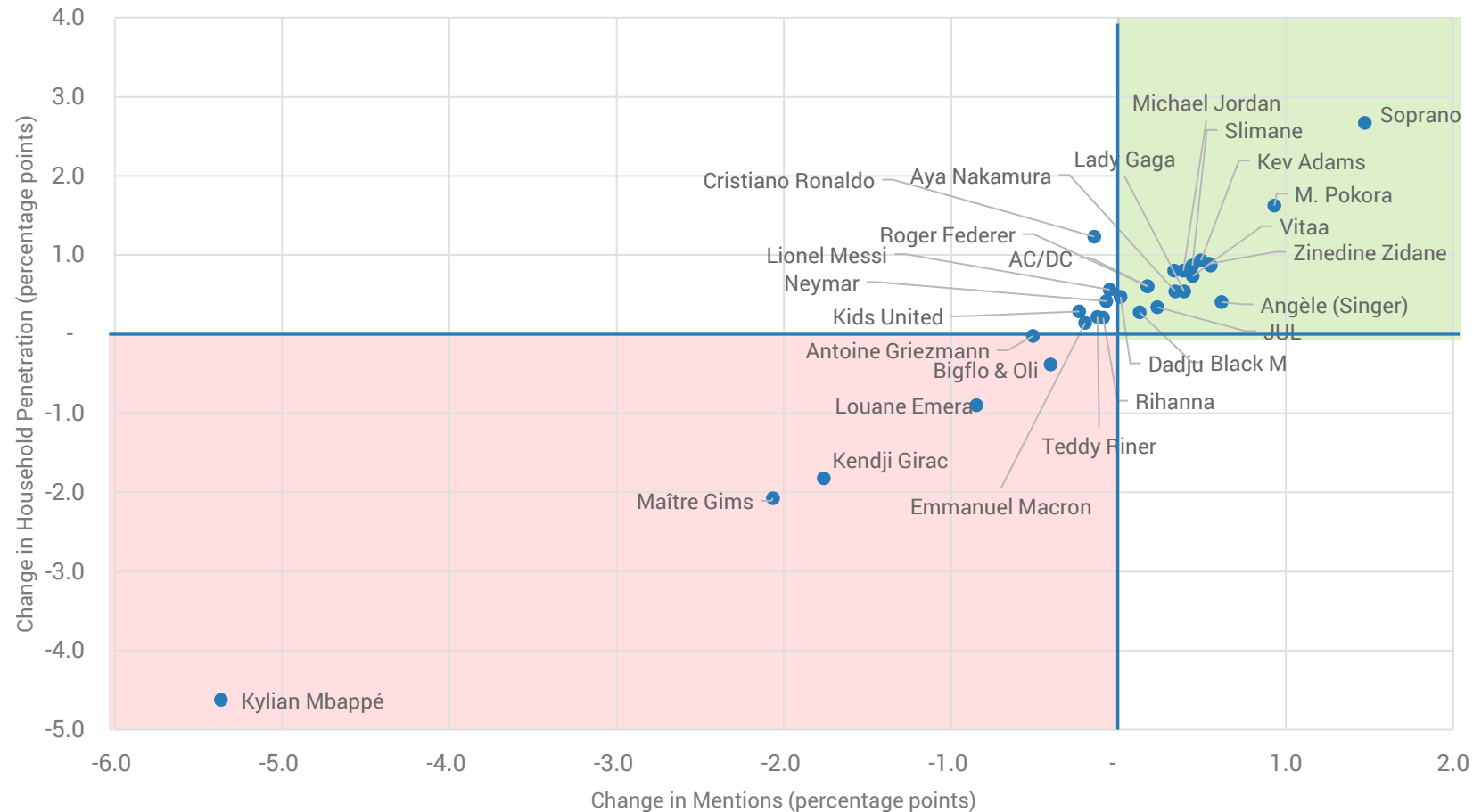
Spontaneous mentions

And the winners are ...

Top 30 favorite licenses in Celebrities

Top 50 licenses:
58.2% of the mentions
vs. 67.6% a YAGO

Top Favorite Licenses in France - April'20 vs. April'19



Source: Kidz Global, BrandTrends May 2020

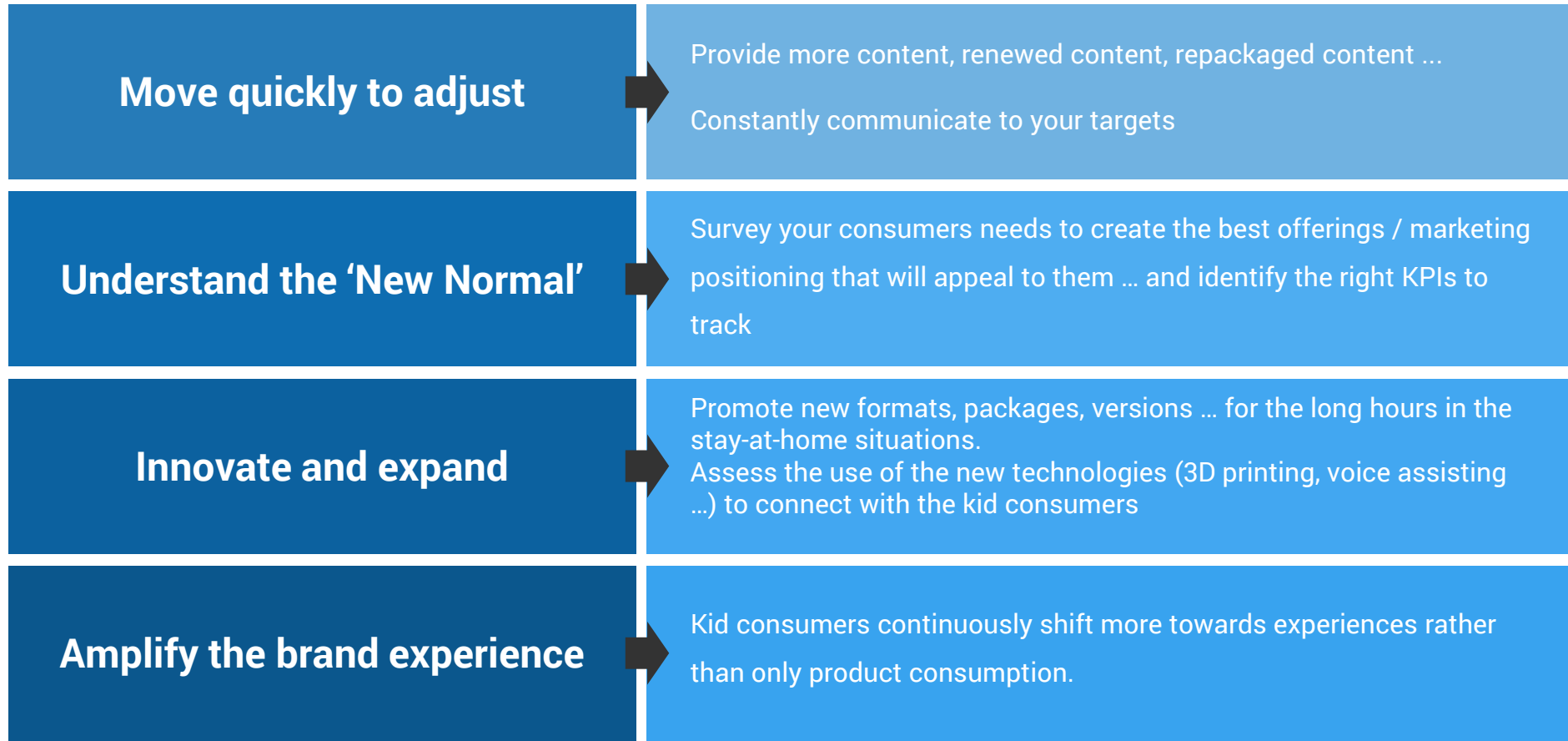
Implications

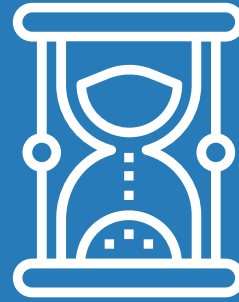
GROWTH



Capture new opportunities

And enhance the current ones





Do not forget the parents!

They are the buyers, they could be the gate keepers, they want to be more part of their kids lives!

In a world where digitalization is going to take over a large part of the transactions, create strong eCommerce programs, in line with the brick-and-mortar (omnichannel experience in short), be part of the development in intelligent shopping carts ...

→ Increase you digital & online investments

→ Understand their new shopper journey



THANK YOU FOR YOUR TIME

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