

Top Favorite Brands & Licenses in France

France – November 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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The objective today

What's in the session for today!



This webinar will explore the changes in the brand favorites among the kids and young adults in France, right at the end of the lockdown period.

This is the bi-annually update on the brands and licenses for the Licensing International members.

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 | 161 | 156 |
| 3-6 Years old | 249 | 255 |
| 7-9 Years old | 257 | 257 |
| 10-14 Years old | 266 | 291 |
| 15-25 Years old | 145 | 166 |

Data was collected in November 2020.

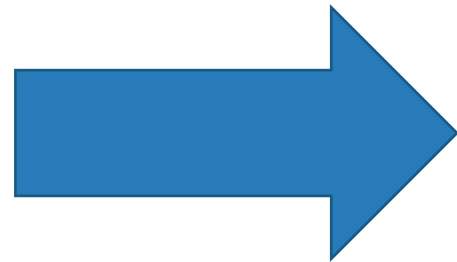
N = 2,203



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

November
2020

France

Still growing in the offering!
Great opportunities for the 'smaller' licenses

1,881

Licenses

French kids up to 25 years old can mention a wide scope of brand names

+123

vs. April'20

An increase of +6.5% in a year: Straight impact of the lockdown!

1,194

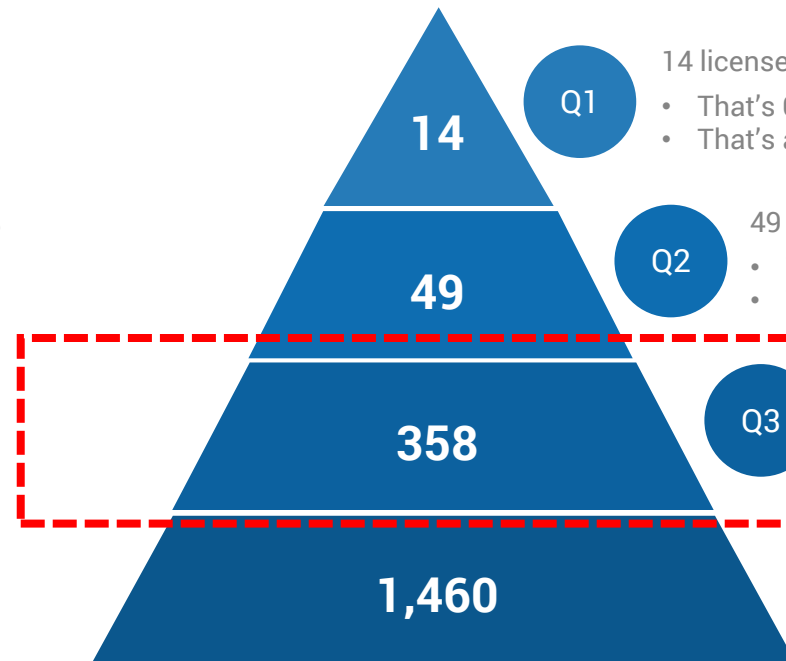
Licenses for Boys

That's an increase by 9.5% in the year.

1,341

Licenses for Girls

That's an increase by 9.6% in the year



Q1

- 14 licenses make 25.1% of the mentions.
- That's 0.7% of all mentioned licenses.
- That's also the same as in April'20.

Q2

- 49 licenses make 25.0% of the mentions.
- That's 2.6% of all mentioned licenses.
- That's also 7 more names vs. April'20.

Q3

- 174 licenses make 25.0% of the mentions.
- That's 19% of all mentioned licenses.
- That's also **184 more names** vs. April'20.

Q4

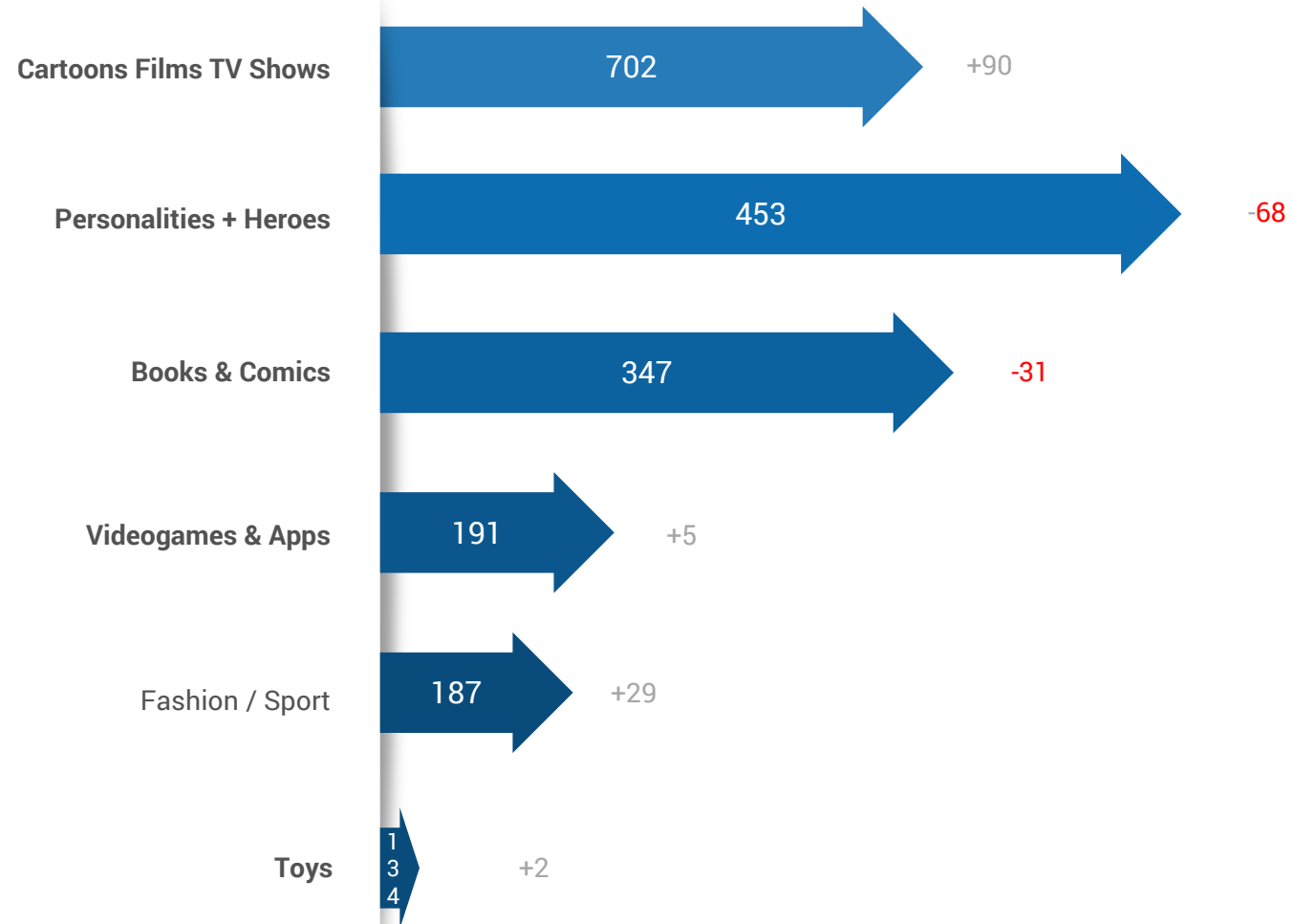
- 1,528 licenses make 25.0% of the mentions.
- That's 77.6% of all mentioned licenses.
- That's also **68 more names** vs. April'20.

Solid growth in the number of names kids can report

Watching TV as well as surfing on the Net drove to a strong push TV content.
However, the sport personalities took a hit on the period.

November
2020

France



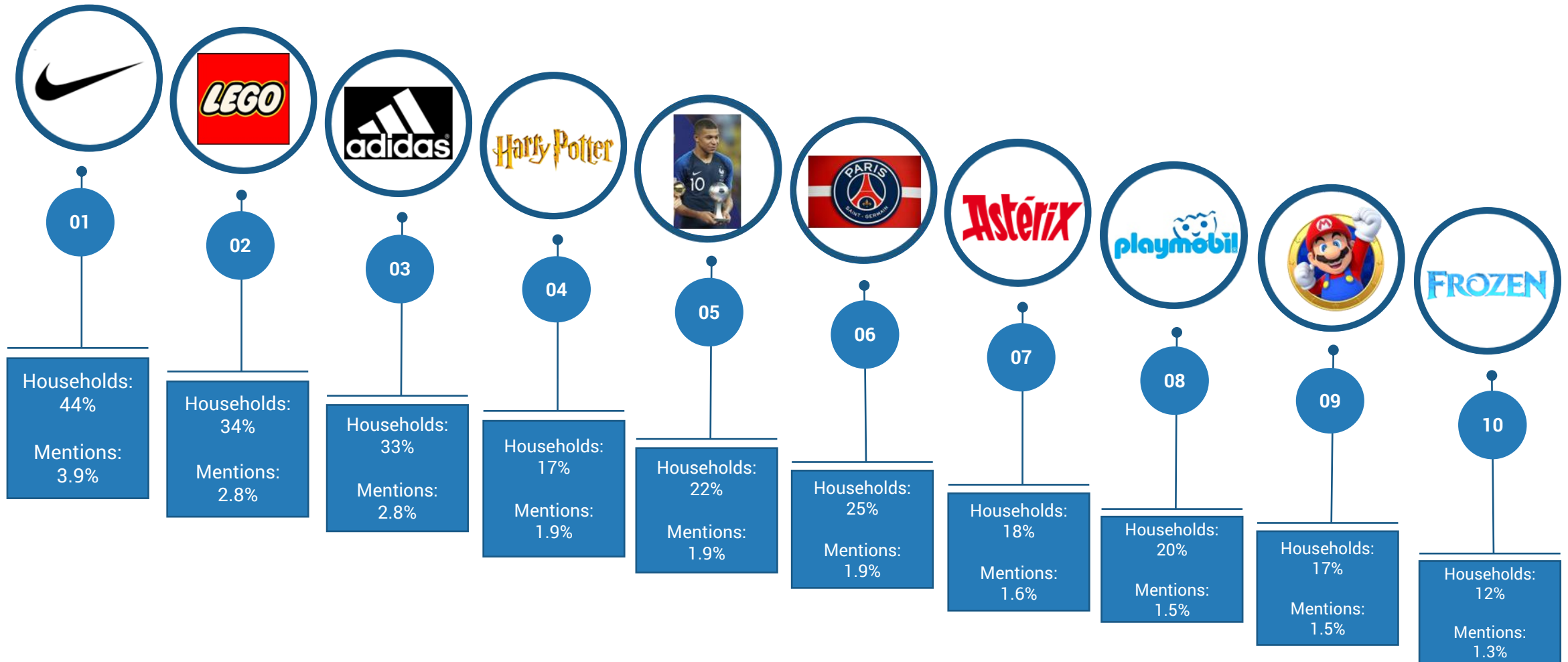
Top 10 Licenses

0 to 25 years old

November
2020

France

Spontaneous mentions



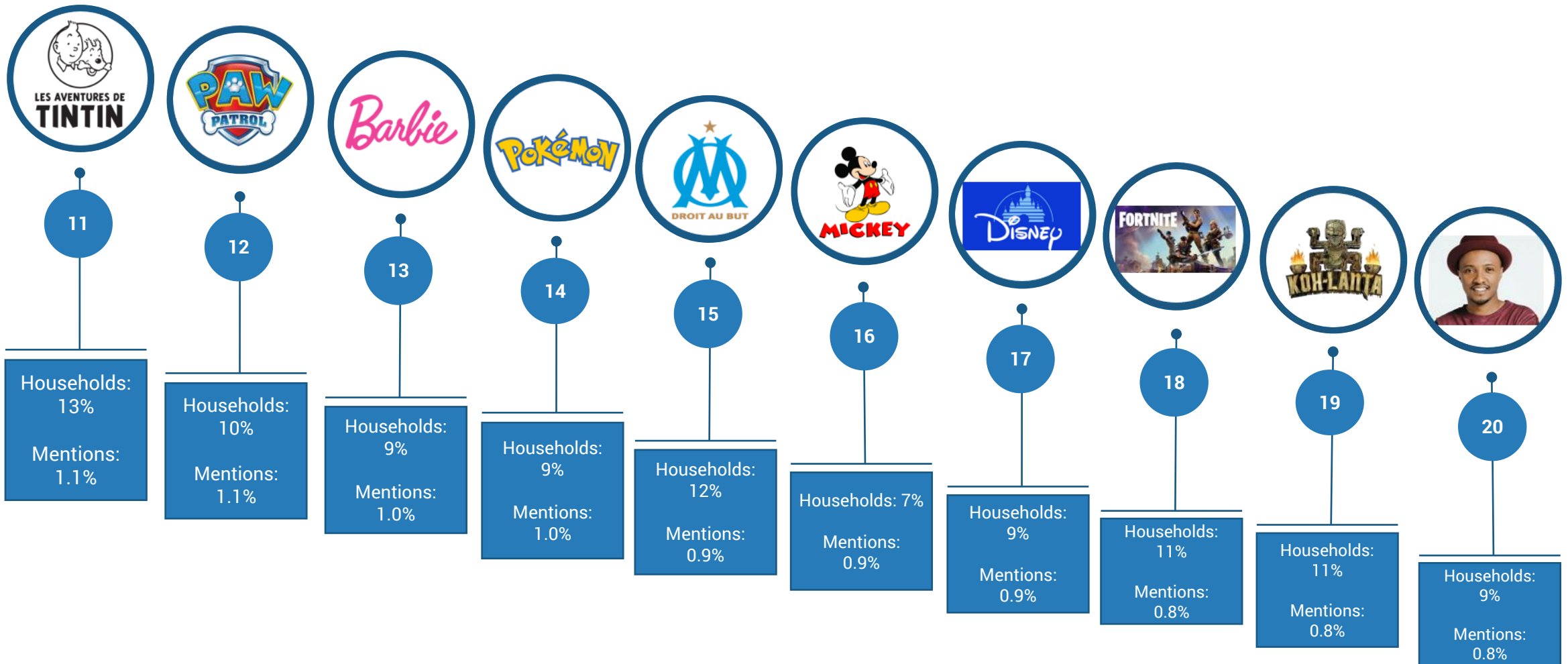
Top 11 to 20 Licenses

0 to 25 years old

November
2020

France

Spontaneous mentions

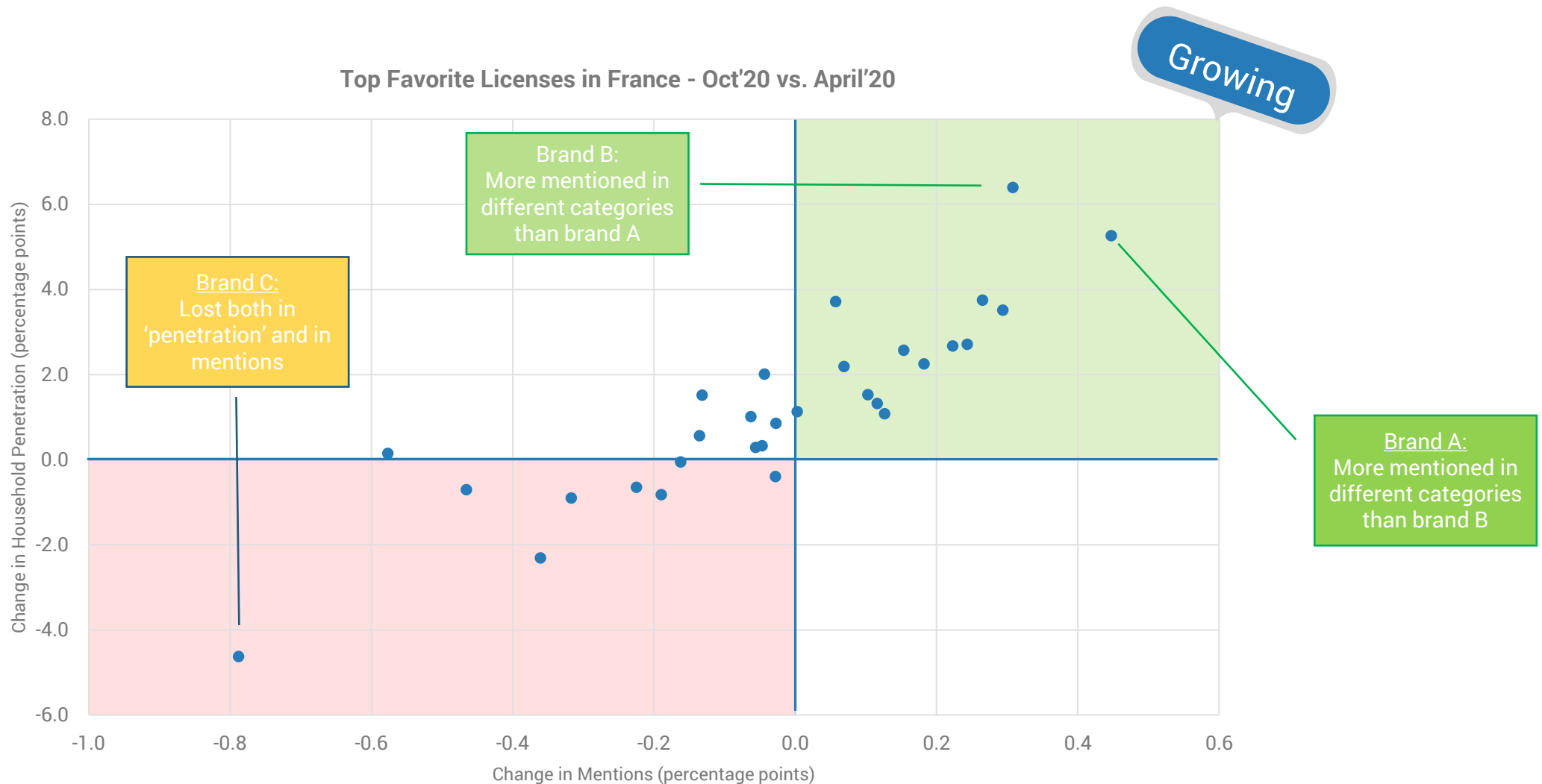


In the next slide

How to read?

November
2020

France



And the winners are ...

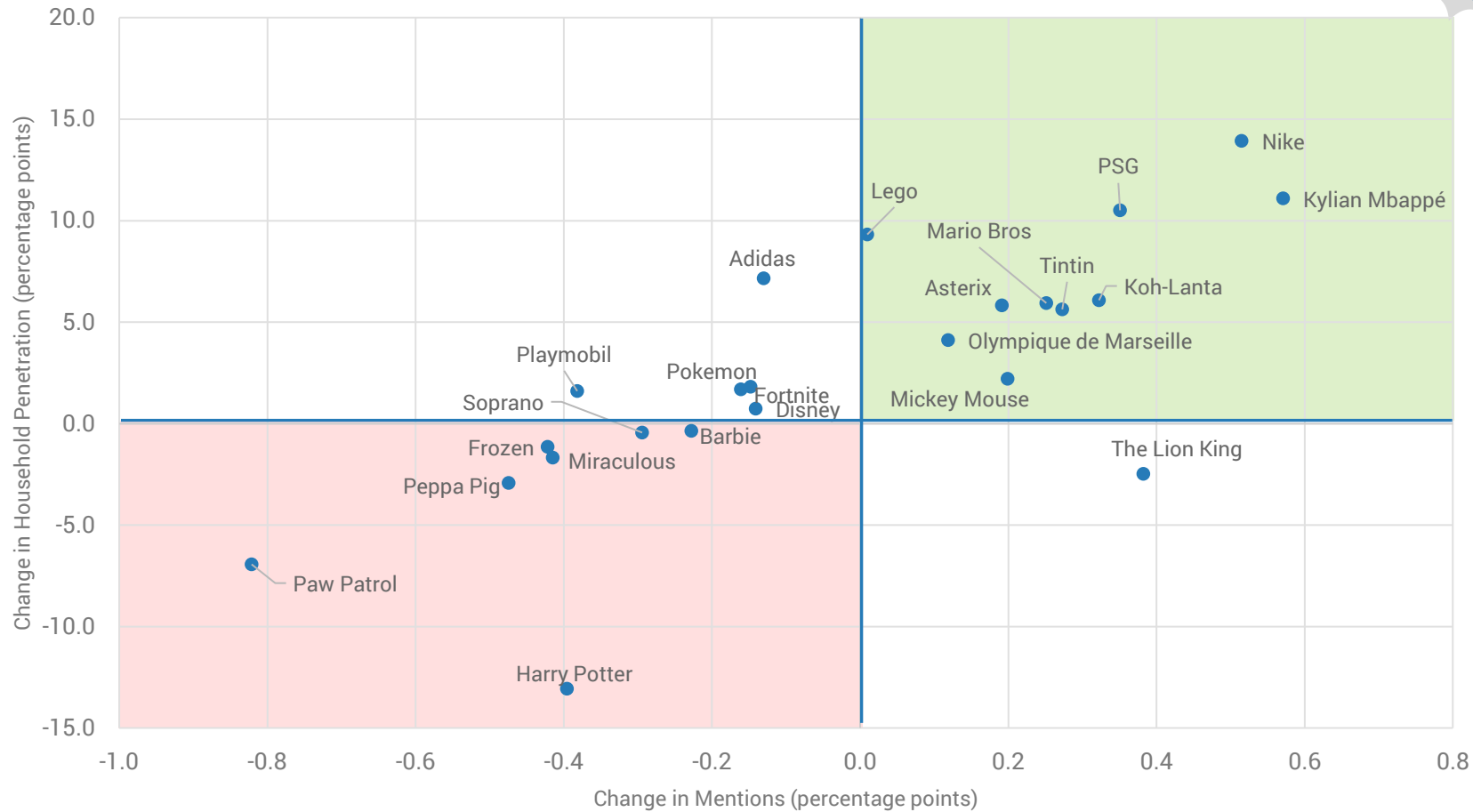
Top 30 favorite licenses

November
2020

France

Growing

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



Spontaneous mentions

And the winners are ...

Top 10 favorite licenses by genre

| Top 10 | Boys | Girls |
|---------------------|------|-------|
| Nike | 4.3% | 3.5% |
| Lego | 3.4% | 2.2% |
| Adidas | 3.0% | 2.5% |
| Harry Potter | 1.4% | 2.3% |
| Kylian Mbappé | 2.3% | 1.5% |
| Paris Saint-Germain | 2.2% | 1.5% |
| Asterix | 2.0% | 1.2% |
| Playmobil | 1.5% | 1.6% |
| Mario Bros | 1.6% | 1.3% |
| Frozen | 0.3% | 2.2% |

Same intensity
across genders

Spontaneous mentions

And the winners are ...

Top 11-20 favorite licenses by genre

| Top 11-20 | Boys | Girls |
|----------------------------|------|-------|
| Tintin | 1.2% | 1.1% |
| Paw Patrol | 1.5% | 0.7% |
| Barbie | 0.0% | 1.9% |
| Pokemon | 1.4% | 0.5% |
| Olympique Marseille | 1.0% | 0.9% |
| Mickey Mouse | 0.8% | 0.9% |
| Disney | 0.6% | 1.1% |
| Fortnite | 1.4% | 0.3% |
| Koh-Lanta | 0.9% | 0.8% |
| Soprano | 0.9% | 0.7% |

Same intensity
across genders

Spontaneous mentions

And the winners are ...

Top 10 favorite licenses by genre among 0 to 6 years old

| Top 10 | Boys | Girls |
|----------------|------|-------|
| Paw Patrol | 5.0% | 2.4% |
| Lego | 3.8% | 2.9% |
| Nike | 3.2% | 2.4% |
| Frozen | 0.6% | 4.6% |
| Playmobil | 2.3% | 2.5% |
| T'Choupi | 2.5% | 2.2% |
| Adidas | 2.4% | 2.1% |
| Mario Bros | 3.0% | 0.9% |
| Cars the Movie | 3.6% | 0.3% |
| Mickey Mouse | 1.8% | 1.8% |

Same intensity
across genders

Spontaneous mentions

And the winners are ...

Top 10 favorite licenses by genre among 7 to 14 years old

| Top 10 | Boys | Girls |
|---------------------|------|-------|
| Nike | 4.6% | 3.6% |
| Adidas | 3.2% | 3.0% |
| Lego | 3.9% | 2.3% |
| Kylian Mbappé | 3.0% | 1.9% |
| Asterix | 2.8% | 1.8% |
| Harry Potter | 1.9% | 2.6% |
| Paris Saint-Germain | 2.4% | 1.8% |
| Mario Bros | 1.4% | 1.7% |
| Playmobil | 1.4% | 1.6% |
| Fortnite | 2.1% | 0.4% |

Same intensity
across genders

Spontaneous mentions

And the winners are ...

Top 10 favorite licenses by genre among 15 to 25 years old

| Top 10 | Boys | Girls |
|---------------------|------|-------|
| Nike | 4.9% | 4.4% |
| Adidas | 3.2% | 2.2% |
| Harry Potter | 1.4% | 3.2% |
| Paris Saint-Germain | 2.2% | 1.5% |
| Lego | 2.0% | 1.5% |
| Tintin | 1.2% | 1.8% |
| Kylian Mbappé | 1.7% | 1.1% |
| Olympique Marseille | 1.3% | 0.9% |
| Olympic Games | 0.8% | 1.0% |
| Asterix | 1.0% | 0.8% |

Same intensity
across genders

Spontaneous mentions

And the winners are ...

November
2020

Top 10 favorite licenses by genre

France

0 to 6 years old

7 to 14 years old

15 to 25 years old

| 0 to 6 years old | | | 7 to 14 years old | | | 15 to 25 years old | | |
|-----------------------|------|-------|----------------------------|------|-------|----------------------------|------|-------|
| Top 10 | Boys | Girls | Top 10 | Boys | Girls | Top 10 | Boys | Girls |
| Paw Patrol | 5.0% | 2.4% | Nike | 4.6% | 3.6% | Nike | 4.9% | 4.4% |
| Lego | 3.8% | 2.9% | Adidas | 3.2% | 3.0% | Adidas | 3.2% | 2.2% |
| Nike | 3.2% | 2.4% | Lego | 3.9% | 2.3% | Harry Potter | 1.4% | 3.2% |
| Frozen | 0.6% | 4.6% | Kylian Mbappé | 3.0% | 1.9% | Paris Saint-Germain | 2.2% | 1.5% |
| Playmobil | 2.3% | 2.5% | Asterix | 2.8% | 1.8% | Lego | 2.0% | 1.5% |
| T'Choupi | 2.5% | 2.2% | Harry Potter | 1.9% | 2.6% | Tintin | 1.2% | 1.8% |
| Adidas | 2.4% | 2.1% | Paris Saint-Germain | 2.4% | 1.8% | Kylian Mbappé | 1.7% | 1.1% |
| Mario Bros | 3.0% | 0.9% | Mario Bros | 1.4% | 1.7% | Olympique Marseille | 1.3% | 0.9% |
| Cars the Movie | 3.6% | 0.3% | Playmobil | 1.4% | 1.6% | Olympic Games | 0.8% | 1.0% |
| Mickey Mouse | 1.8% | 1.8% | Fortnite | 2.1% | 0.4% | Asterix | 1.0% | 0.8% |

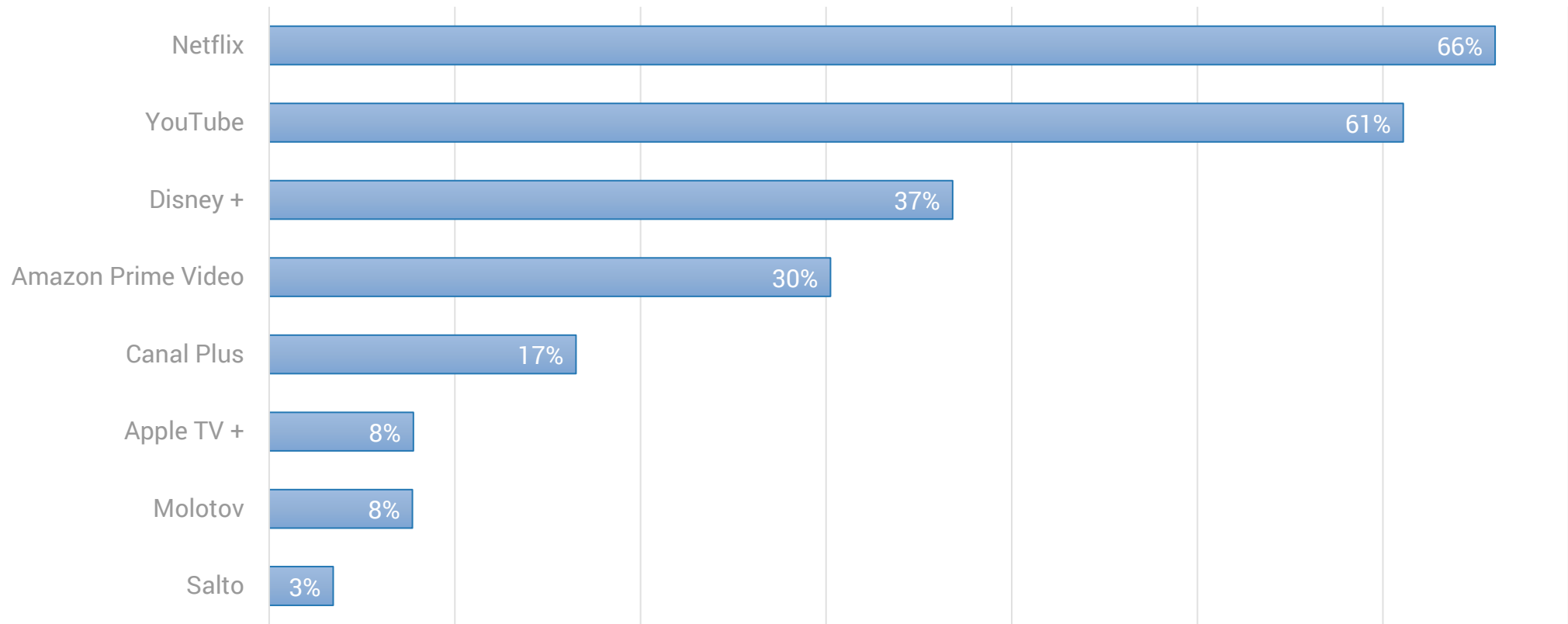
Spontaneous mentions



The top 10 licenses ...

Strong entry of Disney+

Streaming Sources among the 0-25 Households - France





And the winners are ...

November
2020

France

Entertainment

Top 10 favorite licenses by age and genre in Entertainment (excl. Toys & Videogames)

0 to 6 years old

7 to 14 years old

15 to 25 years old

| Top 10 | Boys | Girls | Top 10 | Boys | Girls | Top 10 | Boys | Girls |
|----------------|------|-------|----------------|------|-------|------------------|------|-------|
| Paw Patrol | 9.4% | 4.4% | Asterix | 7.3% | 4.6% | Harry Potter | 4.0% | 6.8% |
| T'Choupi | 5.7% | 5.0% | Harry Potter | 4.8% | 6.1% | Tintin | 3.7% | 5.1% |
| Frozen | 1.2% | 8.1% | Star Wars | 4.2% | 1.5% | Asterix | 3.1% | 2.1% |
| Peppa Pig | 2.3% | 5.1% | Koh-Lanta | 2.9% | 2.6% | Koh-Lanta | 2.9% | 2.0% |
| Cars the Movie | 6.3% | 0.5% | Frozen | 0.6% | 4.7% | Titeuf | 1.8% | 2.0% |
| Mickey Mouse | 2.6% | 2.7% | Tintin | 3.3% | 1.9% | The Simpsons | 2.3% | 1.4% |
| Tintin | 2.3% | 1.9% | Pokemon | 3.2% | 1.2% | Pokemon | 2.9% | 0.7% |
| Asterix | 2.7% | 1.6% | Miraculous | 0.3% | 2.7% | Naruto | 3.1% | 0.4% |
| Miraculous | 0.5% | 3.6% | The Loud House | 1.7% | 1.4% | The Hunger Games | 1.9% | 1.2% |
| The Lion King | 1.2% | 2.8% | Naruto | 2.8% | 0.3% | Marvel | 2.9% | 0.3% |

Spontaneous mentions



And the winners are ...

November
2020

Cartoons

Top 10 favorite licenses by age and genre in Cartoons only

France

0 to 6 years old

7 to 14 years old

15 to 25 years old

| Top 10 | Boys | Girls |
|--|-------|-------|
| Paw Patrol | 20.5% | 7.7% |
| Peppa Pig | 3.0% | 8.5% |
| Miraculous: Tales of Ladybug & Cat Noir | 1.1% | 8.9% |
| T'Choupi | 4.9% | 4.8% |
| Cars the Movie | 7.8% | 0.7% |
| PJ Masks | 4.1% | 3.0% |
| Masha & The Bear | 2.6% | 4.1% |
| Frozen | 0.7% | 5.2% |
| Mickey Mouse | 1.9% | 3.7% |
| Pokemon | 3.7% | 1.1% |

| Top 10 | Boys | Girls |
|--|------|-------|
| Miraculous: Tales of Ladybug & Cat Noir | 1.3% | 10.3% |
| Pokemon | 8.8% | 3.0% |
| The Loud House | 6.3% | 4.5% |
| Frozen | 0.6% | 9.1% |
| Scooby-Doo | 5.6% | 3.3% |
| The Simpsons | 1.3% | 4.2% |
| Naruto | 5.3% | 0.3% |
| Asterix | 3.4% | 1.5% |
| Barbie | 0.0% | 4.5% |
| Paw Patrol | 2.8% | 1.8% |

| Top 10 | Boys | Girls |
|-------------------------------------|------|-------|
| Pokemon | 9.3% | 2.2% |
| The Simpsons | 4.3% | 5.6% |
| Naruto | 7.1% | 1.1% |
| Mickey Mouse | 2.9% | 3.9% |
| Dora the Explorer | 0.7% | 5.0% |
| Tom & Jerry | 5.7% | 1.1% |
| The Amazing World of Gumball | 2.1% | 3.3% |
| Totally Spies | 0.0% | 5.0% |
| Winx Club | 0.0% | 4.4% |
| Dragon Ball | 2.9% | 2.2% |

Spontaneous mentions



And the winners are ...

November
2020

France

Celebrities

Top 10 favorite licenses by age and genre in Celebrities/Personalities

0 to 6 years old

7 to 14 years old

15 to 25 years old

| Top 10 | Boys | Girls | Top 10 | Boys | Girls | Top 10 | Boys | Girls |
|-------------------|-------|-------|-------------------|-------|-------|-------------------|-------|-------|
| Kylian Mbappé | 13.6% | 11.2% | Kylian Mbappé | 23.3% | 15.4% | Kylian Mbappé | 12.3% | 8.4% |
| Mickey Mouse | 4.9% | 3.5% | Cristiano Ronaldo | 7.3% | 3.8% | Cristiano Ronaldo | 8.8% | 2.8% |
| Cristiano Ronaldo | 5.4% | 2.4% | Antoine Griezmann | 4.1% | 4.5% | Lionel Messi | 6.5% | 1.4% |
| Neymar | 3.8% | 2.9% | Neymar | 5.6% | 1.5% | Antoine Griezmann | 4.2% | 3.5% |
| Lionel Messi | 3.3% | 2.9% | Zinedine Zidane | 2.1% | 4.3% | Zinedine Zidane | 2.3% | 3.1% |
| Antoine Griezmann | 4.3% | 1.8% | Lionel Messi | 3.4% | 2.3% | Neymar | 2.7% | 1.7% |
| Soprano | 3.3% | 2.4% | M. Pokora | 1.3% | 3.4% | Usain Bolt | 0.4% | 2.4% |
| Zinedine Zidane | 3.3% | 2.4% | Soprano | 2.8% | 1.5% | Florent Manaudou | 1.5% | 1.4% |
| M. Pokora | 2.7% | 1.8% | Squeezie | 1.5% | 1.7% | Roger Federer | 0.4% | 2.1% |
| Minnie Mouse | 0.0% | 4.7% | Louane Emera | 0.4% | 2.8% | Emmanuel Macron | 2.3% | 0.3% |

Spontaneous mentions



Fashion

And the winners are ...

Top 10 favorite licenses in Fashion by genre among 0 to 25 years old

November
2020

France

| Top 10 | Boys | Girls |
|----------------|-------|-------|
| Nike | 30.4% | 23.6% |
| Adidas | 21.2% | 17.2% |
| Puma | 5.4% | 5.0% |
| Zara | 2.1% | 5.4% |
| H&M | 1.6% | 3.1% |
| Decathlon | 2.1% | 2.3% |
| Kiabi | 1.8% | 2.2% |
| Levi's | 2.8% | 1.2% |
| Jennyfer | 0.2% | 2.9% |
| Christian Dior | 0.9% | 2.1% |

Same intensity
across genders

Spontaneous mentions



And the winners are ...

November
2020

France

Fashion

Top 10 favorite licenses by age and genre in Fashion

0 to 6 years old

7 to 14 years old

15 to 25 years old

| Top 10 | Boys | Girls | Top 10 | Boys | Girls | Top 10 | Boys | Girls |
|-----------|-------|-------|-----------|-------|-------|----------------|-------|-------|
| Nike | 28.3% | 21.6% | Nike | 32.7% | 23.7% | Nike | 30.9% | 25.6% |
| Adidas | 20.8% | 18.3% | Adidas | 23.1% | 20.4% | Adidas | 20.1% | 12.7% |
| Kiabi | 5.7% | 3.8% | Puma | 4.6% | 7.7% | Puma | 7.7% | 2.8% |
| Zara | 2.4% | 6.7% | Zara | 2.2% | 3.7% | Zara | 2.0% | 7.4% |
| Puma | 4.7% | 1.9% | Decathlon | 3.0% | 2.2% | H&M | 1.0% | 4.1% |
| Disney | 1.4% | 4.8% | H&M | 1.6% | 2.9% | Christian Dior | 1.0% | 3.6% |
| Decathlon | 1.9% | 3.4% | Levi's | 3.0% | 1.7% | Chanel | 0.3% | 3.9% |
| Orchestra | 2.4% | 2.4% | Kiabi | 1.4% | 2.9% | Jennyfer | 0.3% | 3.9% |
| Okaidi | 3.3% | 1.4% | Lacoste | 2.0% | 1.7% | Gucci | 2.0% | 2.2% |
| H&M | 2.8% | 1.9% | Jennyfer | 0.0% | 3.5% | Lacoste | 3.4% | 0.3% |

Spontaneous mentions



Sport Clubs

And the winners are ...

Top 10 favorite licenses in Sport Clubs by genre among 3 to 25 years old

November
2020

France

| Top 10 | Boys | Girls |
|------------------------|-------|-------|
| Paris Saint-Germain | 36.9% | 35.5% |
| Olympique de Marseille | 17.0% | 20.0% |
| Olympique Lyonnais | 7.6% | 10.3% |
| Real Madrid | 5.9% | 1.3% |
| Barcelona FC | 4.6% | 1.9% |
| FC Nantes | 1.5% | 2.9% |
| AS St-Étienne | 1.8% | 1.9% |
| Juventus FC | 2.0% | 1.3% |
| Lille OSC | 2.3% | 0.6% |
| RC Lens | 0.5% | 2.3% |

Same intensity
across genders

Spontaneous mentions



Sport Clubs

And the winners are ...

Top 10 favorite licenses by age and genre in Sport Clubs

November
2020

France

3 to 6 years old

7 to 14 years old

15 to 25 years old

| Top 10 | Boys | Girls | Top 10 | Boys | Girls | Top 10 | Boys | Girls |
|---------------------------|-------|-------|------------------------|-------|-------|--------------------------|-------|-------|
| Paris Saint-Germain | 32.1% | 34.4% | Paris Saint-Germain | 40.5% | 39.3% | Paris Saint-Germain | 32.8% | 29.5% |
| Olympique de Marseille | 16.1% | 18.8% | Olympique de Marseille | 15.8% | 20.8% | Olympique de Marseille | 19.7% | 19.0% |
| Olympique Lyonnais | 10.7% | 9.4% | Olympique Lyonnais | 6.5% | 10.4% | Olympique Lyonnais | 8.2% | 10.5% |
| Lille OSC | 5.4% | 0.0% | Real Madrid | 6.5% | 0.6% | Barcelona FC | 8.2% | 2.9% |
| Real Madrid | 1.8% | 3.1% | FC Nantes | 1.4% | 3.5% | Real Madrid | 6.6% | 1.9% |
| AS St-Étienne | 3.6% | 0.0% | Barcelona FC | 2.8% | 1.7% | AS St-Étienne | 1.6% | 4.8% |
| Barcelona FC | 3.6% | 0.0% | Lille OSC | 1.4% | 1.2% | Juventus FC | 3.3% | 2.9% |
| Los Angeles Lakers | 0.0% | 3.1% | Nike | 0.5% | 2.3% | FC Nantes | 2.5% | 2.9% |
| FC Metz | 1.8% | 0.0% | RC Lens | 0.5% | 2.3% | FC Bayern Munich | 2.5% | 1.0% |
| Racing Club de Avellaneda | 0.0% | 3.1% | Juventus FC | 1.9% | 0.6% | FC Girondins de Bordeaux | 0.0% | 2.9% |

Spontaneous mentions



Toys

And the winners are ...

Top 10 favorite licenses in Toys by genre among 0 to 14 years old

November
2020

France

| Top 10 | Boys | Girls |
|---------------------|-------|-------|
| Lego | 31.9% | 22.1% |
| Playmobil | 16.6% | 17.1% |
| Barbie | 0.2% | 10.6% |
| Vtech | 4.3% | 5.1% |
| Disney | 1.3% | 4.8% |
| NERF | 6.1% | 0.0% |
| Play-Doh | 1.8% | 2.9% |
| Nintendo | 1.6% | 2.9% |
| Marvel | 2.9% | 1.0% |
| Fisher Price | 1.6% | 2.2% |

Same intensity
across genders

Spontaneous mentions



And the winners are ...

November
2020

France

Toys

Top 10 favorite licenses by age and genre in Toys

0 to 6 years old

7 to 14 years old

| Top 10 | Boys | Girls | Top 10 | Boys | Girls |
|-----------------------|-------|-------|---------------------|-------|-------|
| Lego | 23.4% | 20.3% | Lego | 38.4% | 23.4% |
| Playmobil | 17.2% | 15.9% | Playmobil | 16.2% | 18.0% |
| Vtech | 8.8% | 10.4% | Barbie | 0.0% | 12.0% |
| Play-Doh | 3.8% | 6.8% | NERF | 10.8% | 0.0% |
| Barbie | 0.4% | 8.8% | Nintendo | 2.5% | 4.8% |
| Fisher Price | 2.5% | 4.8% | Disney | 0.6% | 4.8% |
| Disney | 2.1% | 4.8% | LoL Surprise | 0.0% | 5.1% |
| Paw Patrol | 5.0% | 2.0% | Hasbro | 1.6% | 3.3% |
| Cars the Movie | 3.8% | 0.0% | Marvel | 3.2% | 1.8% |
| Frozen | 0.0% | 3.2% | Pokemon | 2.5% | 0.6% |

Spontaneous mentions



Videogames

And the winners are ...

Top 10 favorite licenses in Videogames by genre among 3 to 25 years old

November
2020

France

| Top 10 | Boys | Girls |
|--------------------|-------|-------|
| Mario Bros | 14.1% | 16.0% |
| Fortnite | 15.3% | 4.4% |
| Minecraft | 8.1% | 4.2% |
| Animal Crossing | 1.4% | 9.0% |
| FIFA Soccer Series | 6.5% | 3.1% |
| Mario Kart | 3.4% | 5.3% |
| Call of Duty | 4.4% | 1.5% |
| Candy Crush | 1.0% | 3.7% |
| Legend of Zelda | 2.0% | 2.0% |
| Grand Theft Auto | 2.5% | 1.1% |

Same intensity
across genders

Spontaneous mentions



Videogames

And the winners are ...

Top 10 favorite licenses by age and genre in Videogames

November
2020

France

3 to 6 years old

7 to 14 years old

15 to 25 years old

| Top 10 | Boys | Girls | Top 10 | Boys | Girls | Top 10 | Boys | Girls |
|-------------------------|-------|-------|--------------------|-------|-------|--------------------|-------|-------|
| Mario Bros | 35.0% | 18.8% | Mario Bros | 12.5% | 18.2% | Fortnite | 13.7% | 3.6% |
| Mario Kart | 8.0% | 7.2% | Fortnite | 20.6% | 5.2% | Mario Bros | 4.8% | 10.8% |
| YouTube | 2.0% | 10.1% | Minecraft | 10.6% | 5.8% | FIFA Soccer Series | 11.3% | 3.6% |
| Lego | 4.0% | 1.4% | Animal Crossing | 2.2% | 10.1% | Call of Duty | 10.1% | 2.4% |
| Minecraft | 2.0% | 4.3% | FIFA Soccer Series | 5.9% | 3.6% | Animal Crossing | 0.6% | 8.4% |
| Super Mario | 4.0% | 1.4% | Mario Kart | 3.4% | 5.5% | Minecraft | 7.1% | 1.2% |
| Animal Crossing | 0.0% | 5.8% | Legend of Zelda | 1.9% | 2.3% | Grand Theft Auto | 6.0% | 2.4% |
| Talking Tom and Friends | 3.0% | 1.4% | Call of Duty | 2.5% | 1.3% | Candy Crush | 0.0% | 7.8% |
| Cars the Movie | 3.0% | 1.4% | Pokemon | 2.5% | 1.3% | Snapchat | 0.0% | 5.4% |
| Candy Crush | 3.0% | 0.0% | Just Dance | 0.0% | 3.6% | The Sims | 0.0% | 4.8% |

Spontaneous mentions

DEMOGRAPHIC PROFILES

Who are the Super-Fans of ...



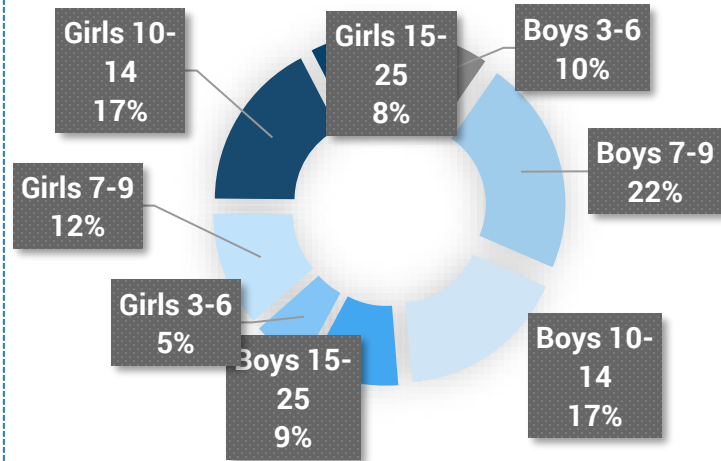


Who are the super-fans of ...

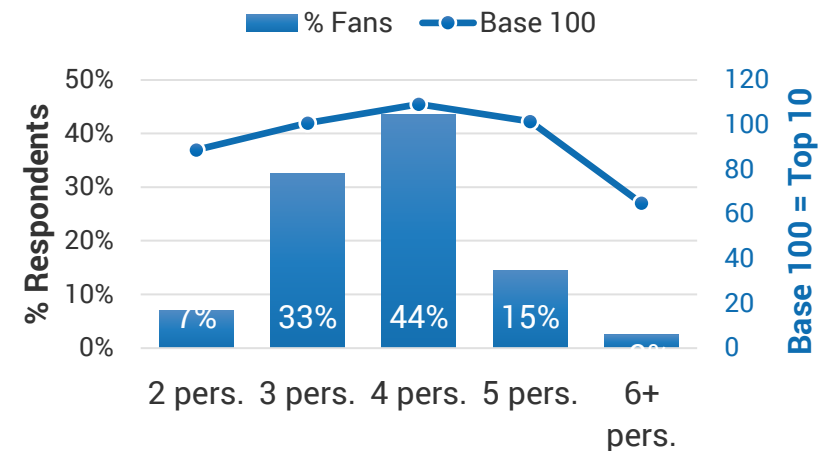
Among 3-25 – France – November 2020
Only spontaneous Mentions

- Boys
- Medium sized households, over representation among the 4 persons
- Over represented among rural households
- Medium+ / High SEC

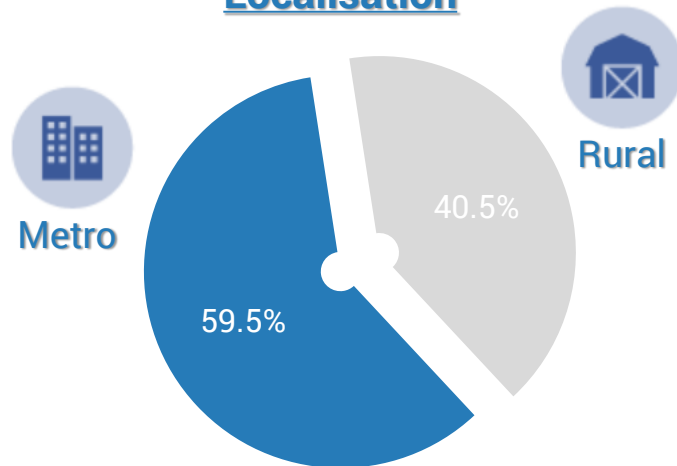
Age & Gender



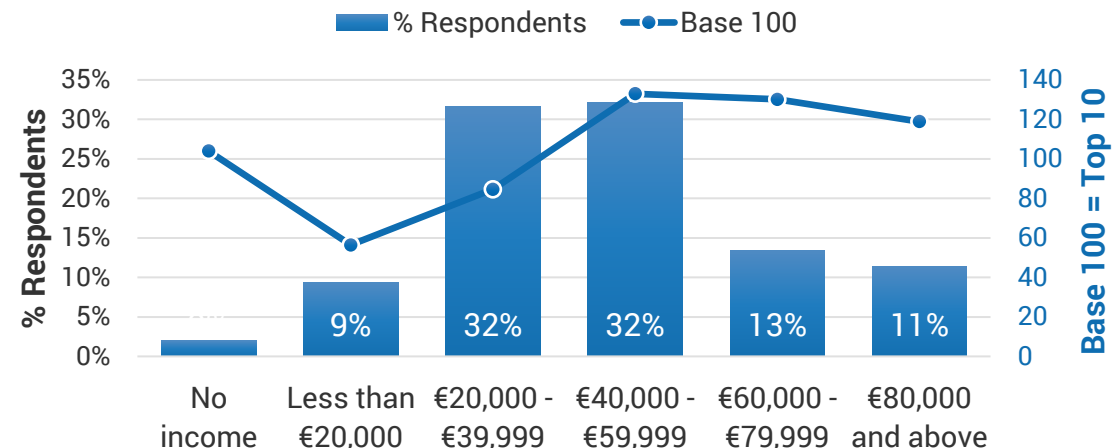
Household Size



Localisation



Household Income



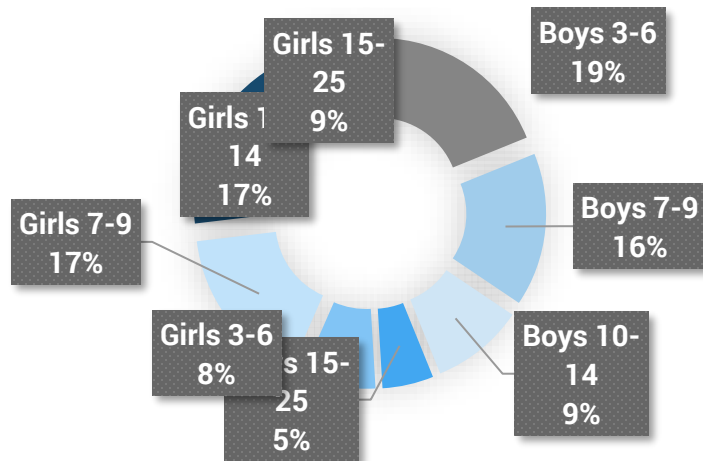


Who are the super-fans of ...

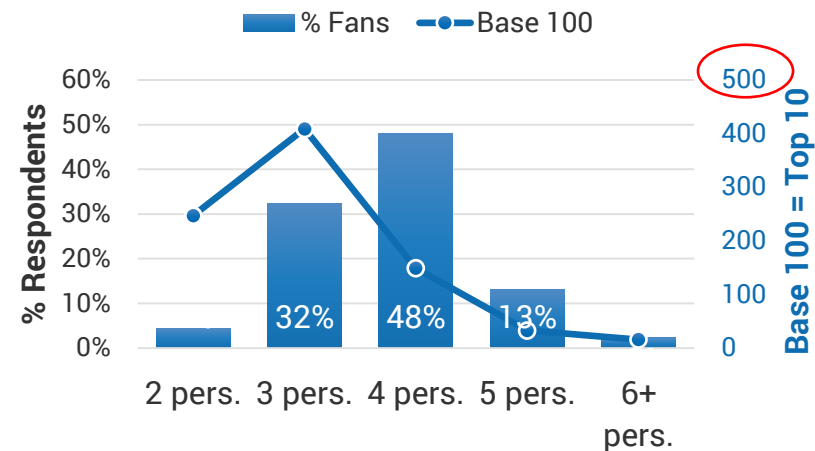
Among 3-25 – France – November 2020
Only spontaneous Mentions

- Mainly Boys
- Smaller household sizes
- Well balanced in Urban/Rural vs. total France
- Household with over €40K annual income

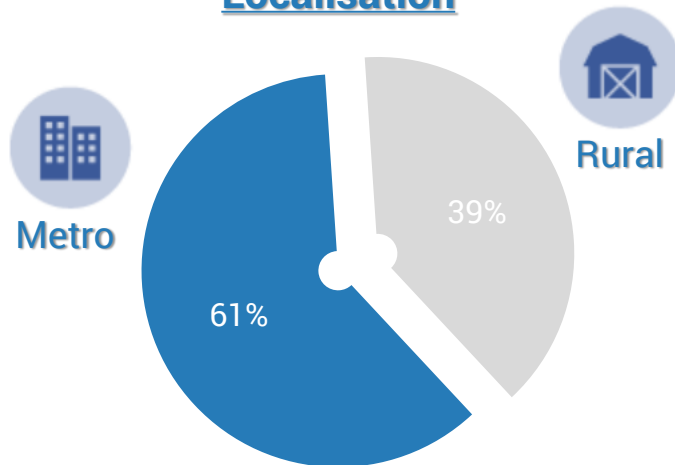
Age & Gender



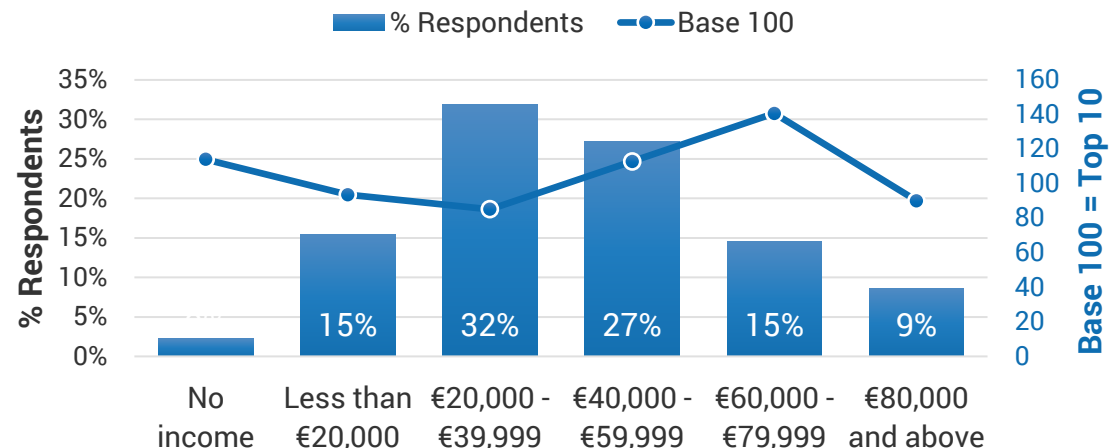
Household Size



Localisation



Household Income



An illustration of two young girls in a green landscape. The girl on the left has brown hair with a yellow headband and is holding a small green plant. The girl on the right has brown hair and is holding a large blue and green globe. The background features a blue sky with a pink heart, a recycling symbol, a tree, solar panels, and wind turbines. A cloud with the word 'ECO' is in the top left.

Children & Sustainable Society

The first multi-country syndicated research about Sustainability among children & families

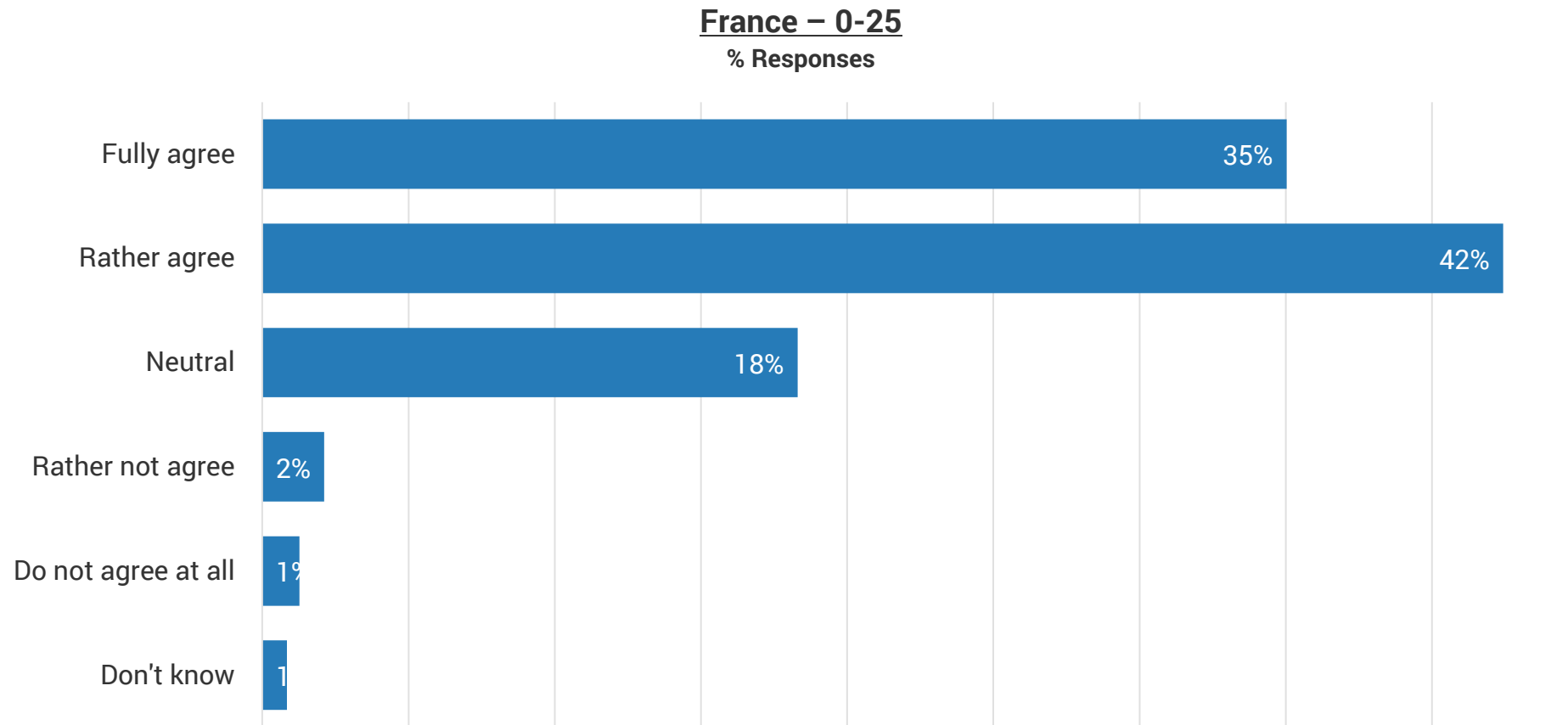
December 2020 - France

Strong expectations towards the brands

November
2020

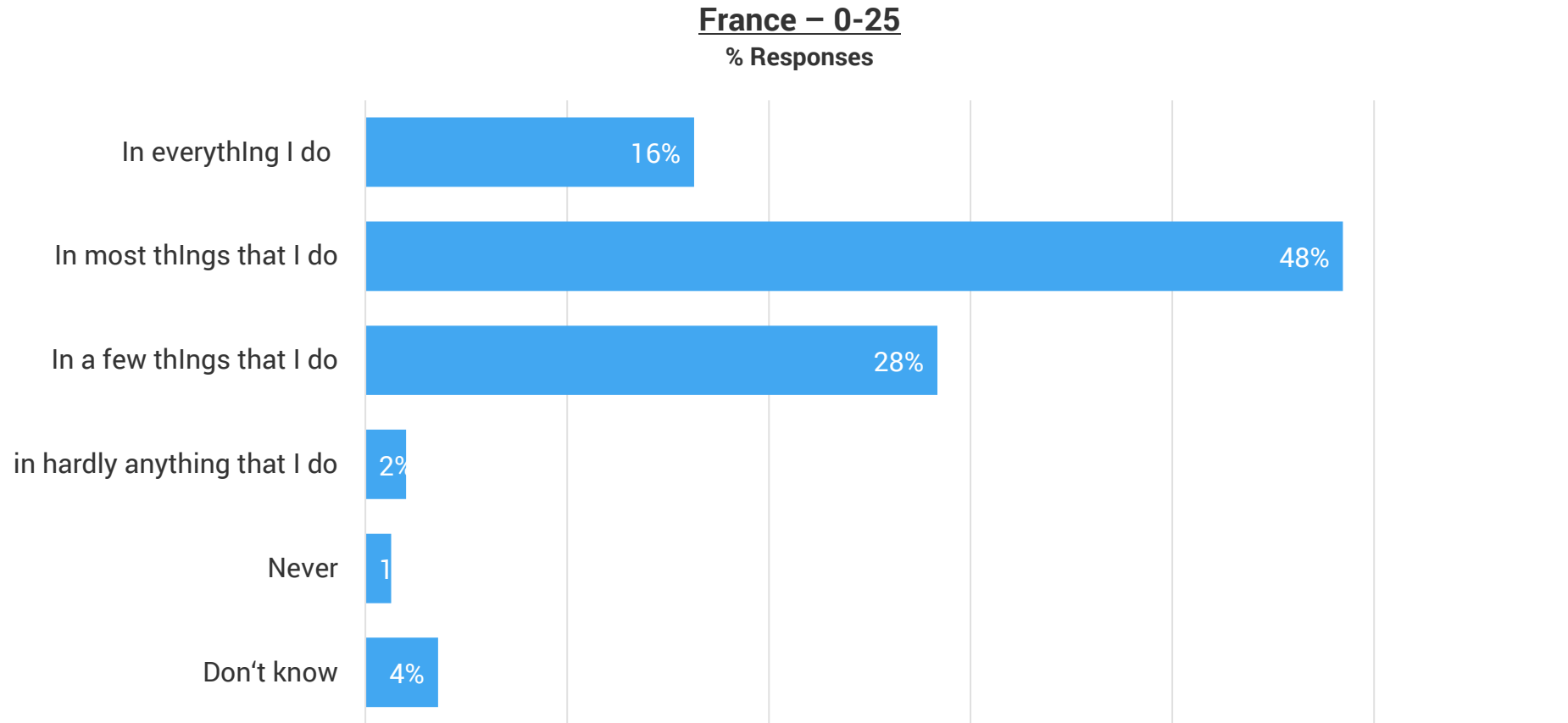
I expect from my favourite brands that they do something to protect the environment and prevent climate change.

France



And consumers slowly get involved

How would you describe your own personal behaviour in terms of saving the environment and stop climate change?



02

Sustainability Definition

A strong commitment for the future, everyone being involved in their daily lives and choices for building a better future.





For French children, Sustainability is about building a better future and implies not only their daily usages and habits but also to be informed and search for information in order to make the right choices now and participate in a better tomorrow.

Sustainability definition

That's interesting to note that Sustainability definition implies more and more concepts while children grow up and are more and more educated and informed. That's part of their citizen behavior.

Have a more reasonable consumption less toys, buy and sell second hand.

G10-14

The planet of the future.

B7-10

I think that Sustainable development is a way of organizing society to meet the needs of the present as effectively as possible without compromising the ability of future generations to meet theirs.

G15-17



It is to pay attention to the earth.
B3-6

Recycling, using objects differently to optimize their lifespan.
B10-14

Buy only what is needed
G7-10



Sustainability in Toys industry is mostly about longer length of life, before materials (and especially wood / less plastic). This also fit to the second hand market, which appears as highly relevant in France and could be explored as opportunities for brands to strengthen the relationship with their consumers.

Inspiration for Sustainable Toys and Games

Main brands are the same across age and gender. Driving a sustainable positioning is definitely about communication (through advertising or pack).



04

Expectations towards Sustainability

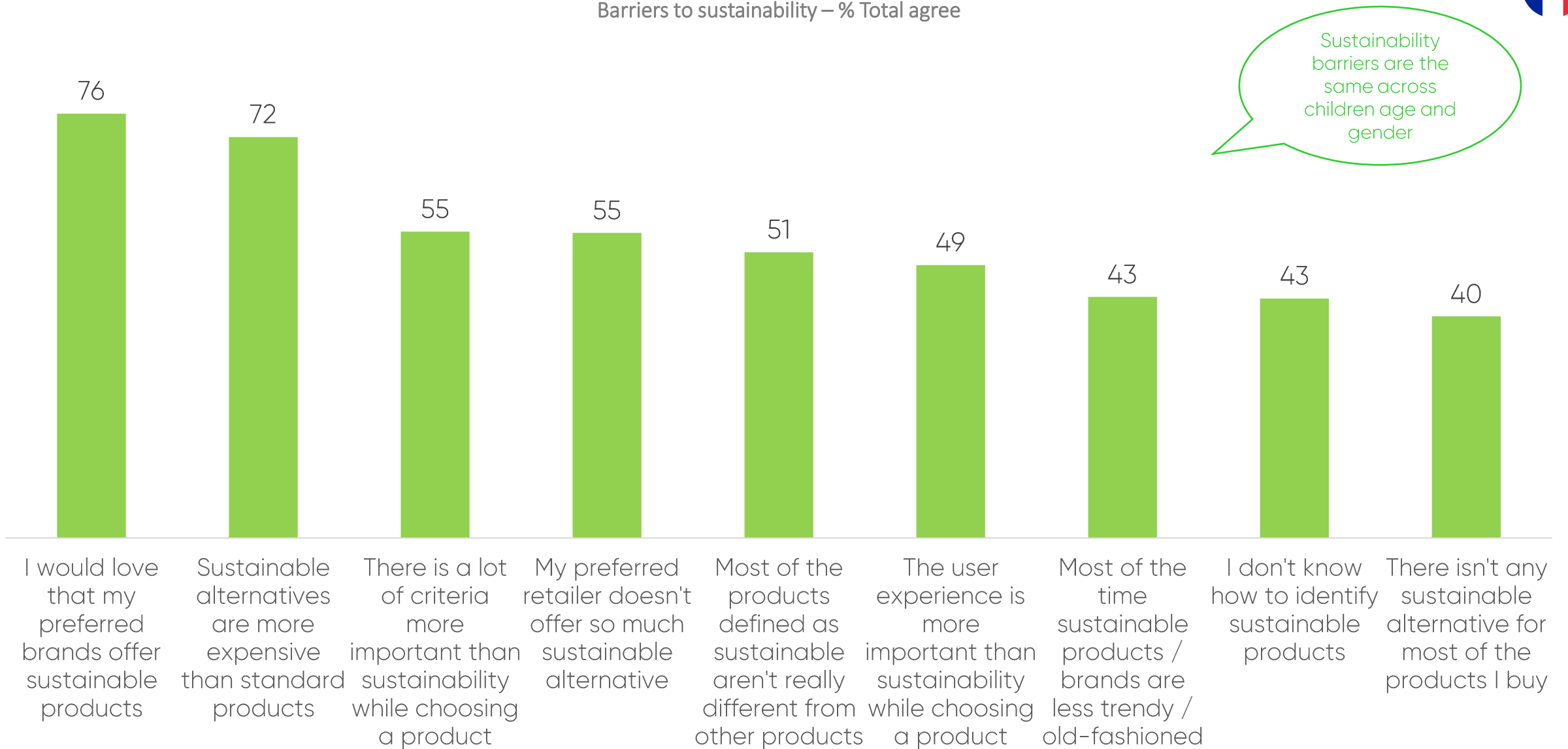
Linked to a huger project for the future, sustainability implies high quality, durability and right choices for components.





Highly committed to Sustainability, French parents would love to access more sustainable products, even if it drives higher prices: sustainability is also linked to higher quality and lead to premium positioning.

Barriers to sustainability – % Total agree





Implications

GROWTH

New opportunities for less exposed licenses, and new ways to exchange with consumers

Move quickly to adjust

- Provide more content, renewed content, repackaged content ...
- Constantly communicate to your targets

Innovate and expand

- Leverage digital to physical.
- Promote new formats, packages, versions ... for the long hours in the stay-at-home situations.
- Assess the use of the new technologies (3D printing, voice assisting ...) to connect with the kid consumers.

Amplify the brand Experience

- Kid consumers continuously shift more towards experiences rather than only product consumption.

Let consumers know about sustainability

- Children and Families as driver of change.
- Brands must take the lead and don't wait for legal constraints or consumer's expectations to participate in a better future; and let their consumers know!

THANK YOU FOR YOUR TIME

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