

BLOOD & BONDS: THE NEW FAMILY

Prosumer Report
—
HAVAS

2025





For many people, it feels as though we're living in a world in turmoil. As we discovered in our 2024 Prosumer study on "[Restoring Trust](#)," more than 7 in 10 adults globally believe the future is increasingly uncertain, stoking fear and a deepening sense of instability and unease. To whom can we turn for comfort and assurance? Certainly not our elected officials. Nearly 4 in 5 Prosumers in the study worried about the current lack of trusted leaders.

Enter: the family.

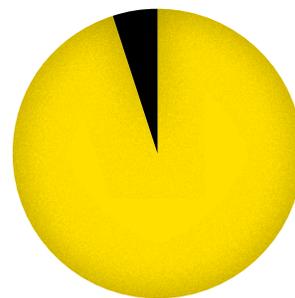
In early 2025, Havas Group surveyed 14,500 women and men aged 18 and older across 30 countries to better understand the role of this essential societal building block, the pressures it faces, and how our concept of family is evolving.



Family as Last Safe Space

Even as our world changes radically amid new technologies and existential challenges, one constant remains: The family anchors individuals, communities, and the whole of society. For all the TV sitcoms, jokes, and memes featuring dysfunctional family dynamics, more than 9 in 10 Prosumers globally regard family as a source of happiness and a driving force that propels them forward.

Family is above all: (Choose one.)



95%
A driving force

5%
A burden that holds me back in life

Moments spent with family are usually a true source of happiness

94%

(showing Prosumers)





HAVE WE REACHED “PEAK FAMILY”?

The security family affords young people may contribute to the fact that more than a third of Gen Zs say they don't spend enough time with their family members. There is, however, a difference between being born into a family and creating one. In an emerging shift with potentially dramatic implications, around two-thirds of baby boomers regard building a family as one of the most essential things in life, but agreement dips to just 43% among Gen Zs.

I don't spend enough time with my family



I believe that building a family is one of the most essential things in life:



(% agreeing strongly/somewhat)

Accordingly, government data show declines in birth rates in many developed countries, with nations as diverse as **France** and **Japan** recording historically low figures. Globally, the total fertility rate (TFR) has fallen from around 5.0 children per woman in 1950 to around 2.2–2.3 in 2024. Studies **project** that the TFR could drop below the population replacement level of 2.1 as soon as 2030.

In this paper, we examine three fundamental shifts revealed by our study: **the reinvention of family**, the **new “parentality,”** and **emerging pressure points**. Each has important implications for brands.

A SAFETY NET

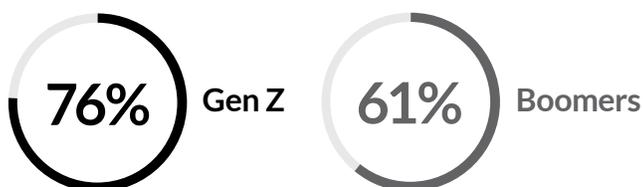
Moreover, at a time when social safety nets are fraying in many parts of the world, family is seen as a financial lifeline. Three-quarters of Gen Zs agreed with this statement, as did nearly 8 in 10 Prosumers, with rates rising to 93% in Saudi Arabia and 95% in China.

I know my family will always provide financial support in times of difficulty

79% PROSUMERS



67% MAINSTREAM



(% agreeing strongly/somewhat)



The Reinvented Family

Historically, blood ties were the foundation of social and, in some cases, political structures across cultures, shaping inheritance, loyalty, and the organization of societies. Today? Not so much.

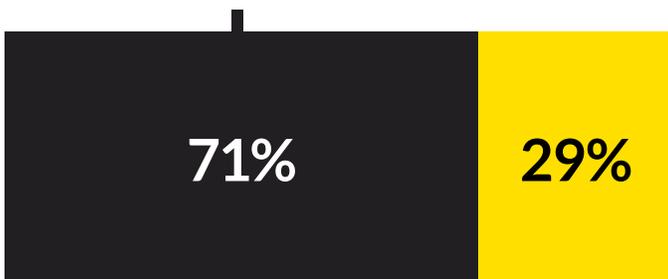
HEART > BLOOD

When we asked Prosumers which was more important in defining *family*, fewer than a third chose “blood ties,” while 71% chose “bonds of love and friendship.” Significantly, this held across generations.

For me, what defines family is...

(Choose one. Showing Prosumers.)

Bonds of love and friendship

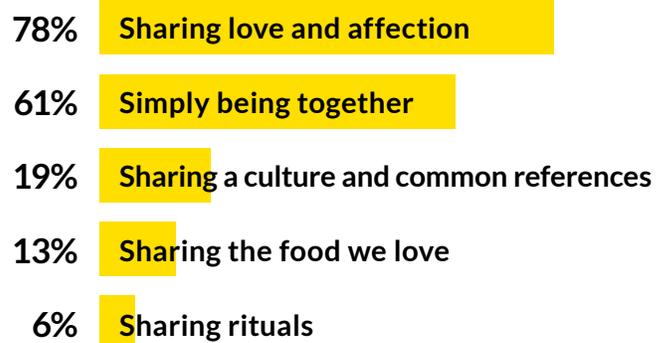


Blood ties

What we’re seeing is not so much a rejection of lineage as an expansion of what it means to be a family. Family is not only about shared roots but also shared emotional attachment. When asked to choose the most potent elements of family happiness, Prosumers were significantly more likely to point to shared love and affection and time spent together than to shared cultural references, food, or rituals. This means families can be created in the absence of blood or marriage.

Family happiness means:

(Choose up to two responses. Showing Prosumers.)





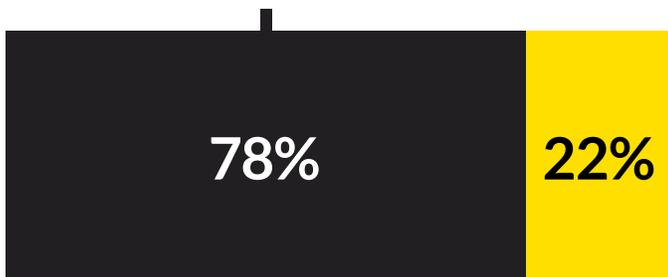
NEW MEMBERS WELCOME (OF ALL SPECIES)

The survey also revealed strong support for blended families—a circumstance that’s increasingly common in some parts of the world. The definition of *family* also extends more often these days to people without a traditional familial relationship. When we asked respondents whom they felt closest to, just as many chose friends as siblings (21%). The Japanese have a word for this phenomenon: *nakama*, meaning friends who share a familial bond.

Which statement aligns most with your viewpoint?

(Choose one. Showing Prosumers.)

Blended families can share as much love as traditional families



Blended families present a risk for children not to find their place

I feel closer to... (Choose up to two.)

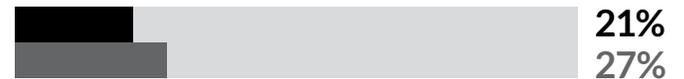
My spouse/partner



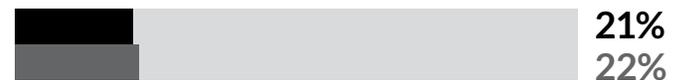
My parents



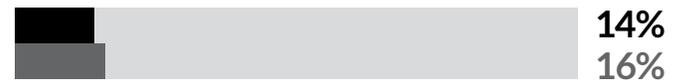
My siblings



My friends



My pets



My in-laws



■ PROSUMERS ■ MAINSTREAM

Nearly 1 in 6 Prosumers feel closer to their pets than to most other potential relationships listed. It’s not surprising, then, that the global market for pet products is **forecast** to reach \$427.75 billion by 2032, up from \$273 billion in 2025.

For client Ultima Affinity, Havas Milan created “**Life-Changing Bonds**,” a series of emotionally resonant films that reflect pets’ position as beloved family members and even lifesavers, reinforcing the brand’s love and respect for the animals its products feed and the humans who cherish them.



IS THE TRADITIONAL FAMILY OBSOLETE?

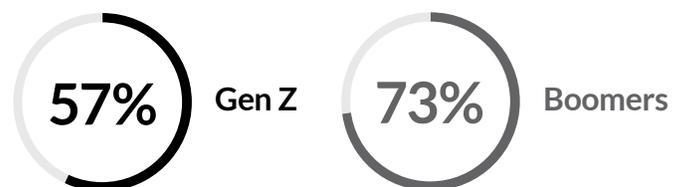
As society adopts a broader view of “family,” one might assume that the traditional nuclear unit that once dominated parts of the world is no longer relevant. That’s not the case. Our survey revealed a strong nostalgia for “the way things were” (or, perhaps more accurately, how people imagine they were). More than 7 in 10 Prosumers would like to see “traditional” family values play a more central role in society. It seems we want everything at once: to expand our definition of *family* while holding tight to what we value from the past. Significantly more boomers than Gen Zs hold this view.

I think traditional family values should play a more central role in our society

71% PROSUMERS



64% MAINSTREAM



(% agreeing strongly/somewhat)

FAMILY FRACTIONS

For all the importance of family, not everyone considers blood ties sacrosanct. More than a third of Prosumers—44% of Gen Zs versus 31% of boomers—have cut ties with a family member because of a perceived values disconnect. These severed relationships are even more prevalent in South Africa and the US, where a majority of Prosumers have gone “no contact” with a relative.

Are there family members you no longer see because you don’t share the same values?



(showing Prosumers)



ROMANTICIZING THE PAST

In an era of disruption and discord, people look back longingly at what they imagine was a more unified past. Around three-quarters of Prosumers globally believe that, in the previous generation, family solidarity was stronger and families shared more in common, politically and culturally. In both cases, boomers showed higher agreement rates than did younger generations.

In my parents' time, families shared more common values (political or cultural)

76% PROSUMERS



66% MAINSTREAM



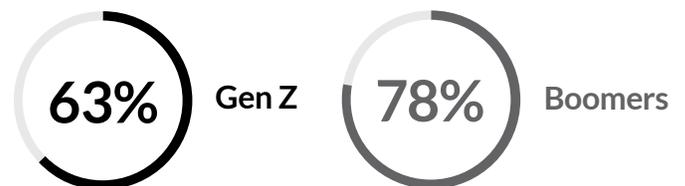
(% agreeing strongly/somewhat)

I feel that in my parents' time, family solidarity was stronger

76% PROSUMERS



69% MAINSTREAM



(% agreeing strongly/somewhat)



There is also pushback against divorce, with more than 3 in 4 Prosumers saying that couples today don't try hard enough to resolve their issues. Havas Creative Group India spoke to the pain of divorce and opportunities for healing in a campaign for Tata CLIQ Luxury. "**Soulmates**" celebrates the meaningful bonds that can endure, even after a marriage is dissolved.

I think people get divorced too quickly nowadays, without trying hard enough to work things out

77% PROSUMERS



71% MAINSTREAM

(% agreeing strongly/somewhat)

FREE-RANGE FAMILIES

When forming a family, a marriage certificate is increasingly optional. Most respondents globally—ranging from a low of 12% in Saudi Arabia, where couples are not permitted to cohabitate, to a high of 80% in France—think marriage isn't a prerequisite to forming a family. This is the view of significantly more women than men. In India, the latest party trend is **fake weddings**, offering all the fun and festivity of the real thing without anyone having to tie the knot.

You don't necessarily need marriage to form a family



(% agreeing strongly/somewhat)



The New “Parentality”

Parenthood has long been described as “the hardest job you’ll ever love,” reflecting its mix of burdens and bounty. When we asked our respondents to choose the statements that best encapsulate being a parent, the clear winner (selected by 80% of Prosumers) was that it’s a source of happiness and satisfaction. The most chosen negative response (selected by 43% of Prosumers) is that it’s a responsibility that is too great.

For me, being a parent is:

(Select all that apply. Showing Prosumers.)

- 80% **A source of happiness and satisfaction**
- 43% **A responsibility that is too big**
- 16% **A source of financial difficulty**
- 15% **A source of anxiety**
- 13% **A source of exhaustion**

A SHARED RESPONSIBILITY... IN THEORY

While an equal percentage of women and men (84%) feel responsible for what might happen to their children, it's clear that societal pressures and household burdens fall disproportionately on the former. Two-thirds of female respondents, compared with half of men, agreed that society puts too much

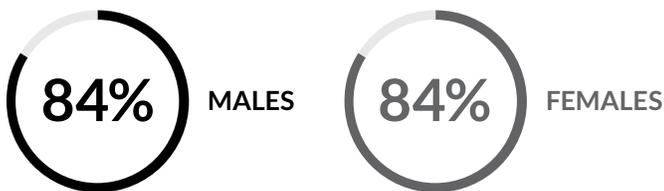
pressure on people to have children. And when asked whether there's too much pressure on parents to be "perfect," 73% of women versus just 60% of men agreed. We can see the impact in the earlier question in which 21% of women versus 15% of men said parenthood is a source of anxiety, while 18% versus 13%, respectively, said it's a source of exhaustion. This goes some way toward explaining why **recent studies** show that young women are less inclined than young men to want to become parents.

I feel responsible for what might happen to my children

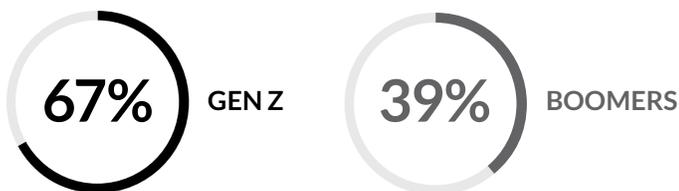
92% PROSUMERS



83% MAINSTREAM

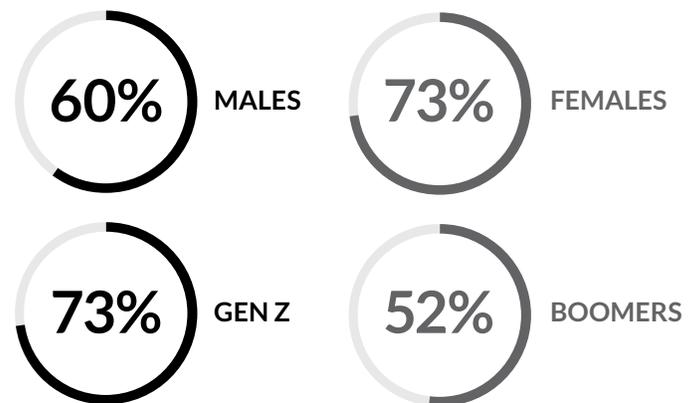


I think society puts too much pressure on people to have children



(% agreeing strongly/somewhat)

I think society puts too much pressure on us to be perfect parents



(% agreeing strongly/somewhat)

For me, being a parent is a source of anxiety



For me, being a parent is a source of exhaustion



Havas Germany produced the "Own It" campaign for fashion brand C&A, challenging the idealized notion of the "perfect parent." The campaign takes a glowing but still raw and honest look at motherhood, including the real-world messiness and emotional complexity, reassuring mothers that their experience is the norm.

In France, BETC worked with Laboratoire Gallia, a leading infant formula brand, to introduce parents to "Gallia & You," a free 24-hour helpline offering mental health support and expert advice on everything from pregnancy and infant feeding to self-care.



WILL GEN Z BE THE CHILDFREE GENERATION?

At a time when there are more ways than ever before to conceive a child, more people are opting out. A contributing factor is likely the outsized financial pressure on younger generations as the cost of living skyrockets in many places. It's more challenging today to secure a long-term job, purchase a home, and save for the future. And so, it's unsurprising to see that twice as many Gen Zs as baby boomers—54% vs. 24%—characterize parenthood as too great a responsibility.

I think it's a good thing that more and more people have the ability to have children (thanks to surrogacy or medically assisted reproduction)

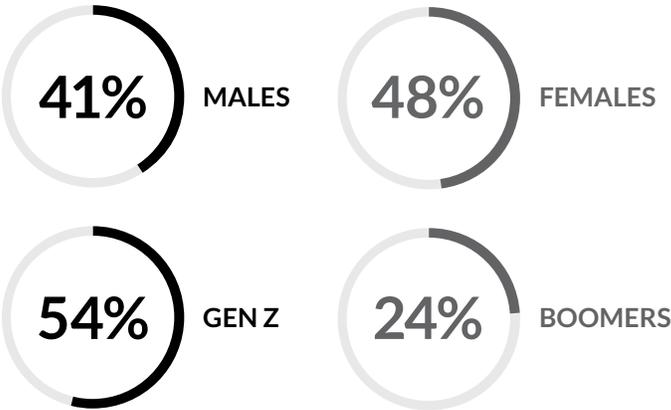
73% PROSUMERS



61% MAINSTREAM

(% agreeing strongly/somewhat)

For me, being a parent is a responsibility that is too big





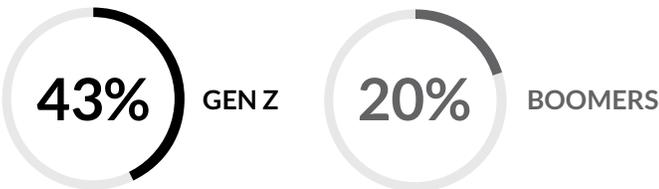
There’s also a heightened sense that bringing a child into this world is the wrong thing to do at present, with more than 4 in 10 Gen Zs calling it a “selfish” choice. Spend any time on social media, and you’re sure to spot popular forums such as #childfreemovement (TikTok) and r/childfree (Reddit). Our survey also found that 61% of women disagreed with the statement that a woman without children is not fully fulfilled. This compares with 46% of men who disagreed.

I think it’s selfish to have children in a world that’s moving in the wrong direction

36% PROSUMERS



35% MAINSTREAM

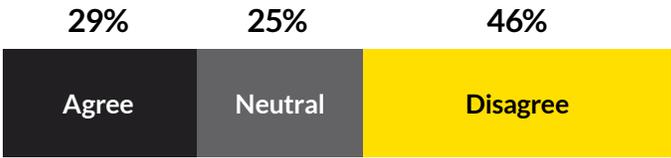


(% agreeing strongly/somewhat)



I believe a woman who hasn’t had children is not fully fulfilled (showing Prosumers)

MALES



FEMALES



(% agreeing strongly/somewhat)

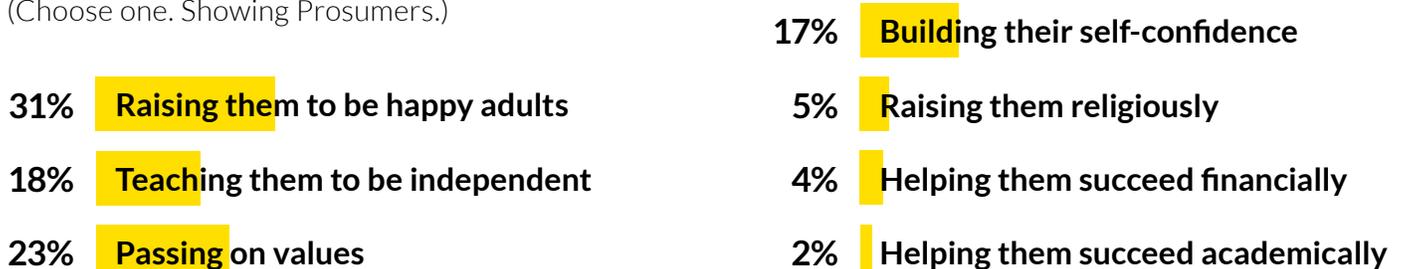


The Role of Brands

Family is the foundation on which a stable society rests, but modern pressures threaten its structure. Our study reveals that what matters most to parents is raising children who grow into happy adults, but that isn't easily accomplished.

Raising children is primarily about:

(Choose one. Showing Prosumers.)



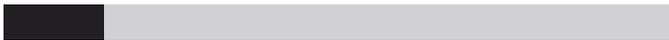
For brands, there are opportunities to ease the pressure points of parenting and household responsibilities, helping more families to flourish. Three main avenues: increasing parents' sense of control, bringing families together around food, and empowering them financially.

PARENTAL CONTROL

For the most part, the surveyed adults don't appear troubled by a perceived lack of parental control. Only 15% of respondents with children were unsure how to earn and retain their children's respect. That said, myriad societal forces challenge parental authority, starting with the educational system. As Havas Group explored in our *Prosumer Report* on "**Authority vs. Freedom**," school systems in some countries have become flashpoints as disgruntled parents push back against policies and curricula. In the current study, 71% of Prosumers—with a high of 93% in Brazil—said parents should have the final say in their children's education. An even higher proportion of Prosumers (84%) believe parents must be able to control what their children do on social media.

I no longer know how to be respected by my children (Showing respondents with children)

15%



I believe parents should have the final say in their children's education

71% PROSUMERS



63% MAINSTREAM

It's crucial that parents can control what their children do on social media

84% PROSUMERS



79% MAINSTREAM

(% agreeing strongly/somewhat)

Social media is an increasingly fraught space for families—and in some cases, parents share the blame. In France, L'Enfant Bleu Association released and distributed a **children's book** for free to raise parents' awareness of the dangers of *sharenting*—the practice of sharing images of their children on social media. Conceived by Havas Play and published by Havas Édition, the book includes a postscript that educates parents on safe digital practices. In another collaboration with the nonprofit, Havas developed an **innovative campaign** to help children discreetly reach out for help while using the popular gaming site Fortnite.

FAMILY MEALS MATTER

Whether it's a weeknight dinner or a holiday feast, shared meals bring families together, create opportunities to pass down traditions and rituals, and offer a respite from the frenetic pace of everyday life. Not surprisingly, nearly 9 in 10 Prosumers characterized eating together as essential to family bonding. Concerningly, this custom is becoming less common in parts of the world. Surveys have found that around a quarter of **Americans** and nearly **a third of Europeans** eat every meal alone. This trend worries Prosumers, 82% of whom express sadness that families no longer gather around meals.

Eating together at the same table is an essential ritual to bring my family together

89% PROSUMERS



81% MAINSTREAM

I find it sad that families don't share enough meals together anymore

82% PROSUMERS



75% MAINSTREAM

(% agreeing strongly/somewhat)



Potentially contributing to this loss of ritual is the diversity of modern diets and health issues surrounding food. Moreover, there are plenty of ways in which parents can be criticized for poor choices—real or perceived. Two examples: Only around a quarter of Prosumers globally think it’s OK for parents to impose a vegetarian diet on their children, and nearly half of Prosumers—rising to two-thirds in Saudi Arabia—think parents who allow their children to eat poorly and become obese should be prosecuted for negligence.

I think it’s OK for parents to impose a vegetarian diet on their children

26% PROSUMERS



20% MAINSTREAM

(% agreeing strongly/somewhat)

Parents who allow their children to eat poorly and become obese should be prosecuted for negligence

47% PROSUMERS



39% MAINSTREAM

(% agreeing strongly/somewhat)

To counter the trend away from family meals, BETC worked with dairy product brand Kiri Arabia on a [campaign](#) celebrating shared meal preparation and recipe-sharing and their potential to strengthen family bonds.



THE BANK OF US

As we saw earlier, money is another family tie that binds. It’s an asset whose abundance or lack determines (or at least heavily influences) how and where children are raised, the friends they make, the level of education they attain, and whether they enter adulthood with the advantage of generational wealth or must get by on their own, with neither funding nor family connections.

Around three-quarters of Prosumers and two-thirds of the mainstream consider it essential to pass on money to their children. The agreement rate exceeds 90% in many markets, including India, Saudi Arabia, France, and South Africa. Globally, there’s a whole lot of money waiting to be passed down, with generational transfers of around **US\$74 trillion** anticipated over the next 20–25 years. Currently, members of the baby boom generation make up less than 13% of the population but control around 45–55% of the world’s household wealth.

It’s essential for me to save money to pass it on to my children

77% PROSUMERS



65% MAINSTREAM

(% agreeing strongly/somewhat)

In the US, Havas teamed with Lincoln Financial Group to promote a fresh perspective on retirement, framing it as an **“action plan”** rather than a slowdown. The campaign blends financial preparedness with lifestyle aspirations, making retirement planning feel empowering and family-oriented.



TEACH 'EM YOUNG

Parents’ financial responsibilities aren’t limited to child-rearing expenses and inheritance. Fully 95% of Prosumers globally—including an astonishing 100% agreement rate in Brazil and South Africa—said it’s important to start teaching children financial management at a young age.

It’s important to teach children how to manage money wisely from a young age

95% PROSUMERS



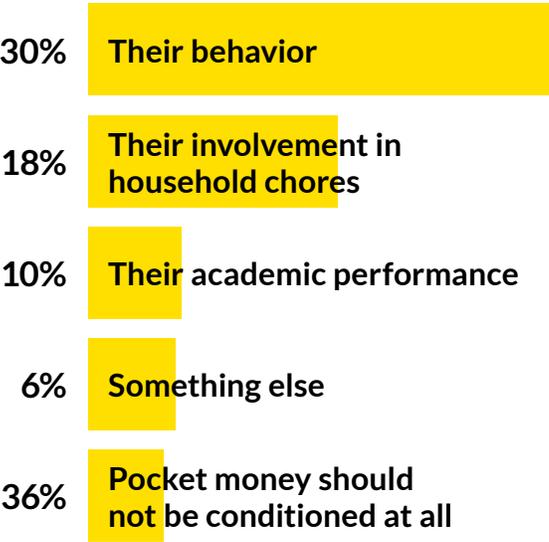
92% MAINSTREAM

(% agreeing strongly/somewhat)

For many children, those lessons start with learning how to earn and manage a weekly or monthly allowance—and those funds typically come with strings attached. Only around a third of Prosumers globally think pocket money should be given unconditionally, while two-thirds say it should be tied to children’s behavior, involvement in household chores, academic performance, or another parental expectation.



Pocket money for children should be based on:



Recognizing that students and young adults often are unprepared for financial decision-making, Havas Media Group created a **campaign** for a financial technology client using Connected TV (CTV). The campaign leveraged short- and long-form video in this highly viewable environment, boosting transactions and making complex financial products more approachable.

QUID PRO QUO?

The flow of family money is not intended to be one-way. Most Prosumers (57%)—rising to 91% in China and 92% in India—think adult children should be required to financially support their parents when they grow old.

Children should be required to financially support their parents when they grow old



(% agreeing strongly/somewhat)

IN A NUTSHELL

1. In times of social and political crisis, family is the ultimate source of emotional and financial support.

2. The definition of family is expanding, now centered more on love and affection than blood or legal ties.

3. Still, the nuclear family model remains dominant in many parts of the world, often idealized through a romanticized notion of traditional values.

4. Parenthood is a significant source of both joy and pressure (social, financial), with women typically carrying the heavier load.

5. Technology is creating new paths to parenthood (e.g., IVF, artificial wombs), yet Gen Z is not actively planning for parenthood.



6. Child-rearing is now centered on fostering happiness and autonomy.

7. At the same time, parents want to maintain control over their children's education and behavior, including their online lives.

8. Family meals remain a vital ritual for bonding and passing down traditions and values, though they are becoming less frequent and a source of conflict (e.g., debates over diet).

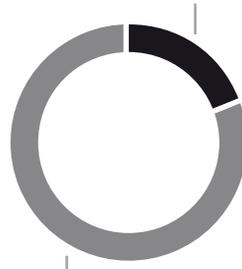
9. Teaching children about money management from an early age is seen as essential, though parents' motives may not be entirely selfless.



About the Study

In the first quarter of 2025, Havas partnered with Market Probe International to survey 14,500 people ages 18+ in 30 markets: Argentina, Australia, Austria, Brazil, Canada, Chile, China, Colombia, Czech Republic, Egypt, France, Germany, Greece, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Philippines, Poland, Saudi Arabia, South Africa, South Korea, Spain, Thailand, United Arab Emirates, United Kingdom, and United States.

The survey sample was made up of **18%** leading-edge **Prosumers**



and **82%** mainstream consumers.

Who Are Prosumers?

Prosumers are today's leading influencers and market drivers. They have been a focus of Havas studies for two decades. Beyond their own economic impact, Prosumers are important because they influence the brand choices and consumption behaviors of others. What Prosumers are doing today, mainstream consumers will likely be doing 6 to 18 months from now

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VOLUME 54 | 2025