



GLOBAL *TRENDS* REPORT

2020

EXECUTIVE SUMMARY



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Leveraging Dynata's global scale, our relationships with both consumers and brands, and the industry's largest fully-permissioned first-party data set, our 2020 Global Trends Report closes the gap between trends and the underlying factors behind them, delivering a unique level of depth and breadth on these topics.

As with the 2019 Global Trends Report, there are topics in this year's report presenting compelling evidence of changes in consumer attitudes and behaviors, offering context for larger societal trends. The following four topics demonstrate those changes:

- **Voice-activated assistants, such as Amazon's Echo and Alexa, Google's Home and Apple's HomePod, are becoming more prevalent and increasingly being used "very often."** The fact that these devices are gaining a greater foothold in daily life could herald the broader adoption of other technology-enabled household tools (remote-controlled heating systems, door locks, etc.), connecting our devices and powering the Internet of Things. Brands need to develop new products and strategies to address this trend in order to stay ahead of the curve.
- **Attitudes on climate change have hardened since last year as people demonstrate greater certainty in their beliefs on the topic.** After a year in which climate change was prominent in political, social, economic and even religious discussion, the number of people who are 100% sure climate change is a reality has risen from last year, as has the number of people who are 100% sure climate change is not a reality.
- **Greater awareness of data and personal privacy – driven by news of data breaches and increased legislation – is driving consumers to take direct action against corporations, and they're doing this not by complaining directly or signing petitions, but increasingly via their buying power.** They are abandoning website visits, deleting apps or avoiding downloading them at all because of privacy concerns. Each of these actions, potentially, is a sale lost. We also see a growing feeling around the world that consumers are losing control over their personal data, and that companies have been dishonest about how that data is being used. Companies that act now to allay privacy concerns, mainly through transparency and increased consumer choice on what to share, may reap considerable business benefits.
- **There is a continued rise in the categories of sub-media adaptable to the individual, customizable and programmable with algorithms based on their input.** The growth of these on-demand and streaming services demonstrates we are no longer passive consumers of media, but active agents in the process, making the future of "broadcast" TV and radio uncertain. Millennials and Gen Z already consume over half their TV either on-demand or via streaming services. The same is true of radio for these generations: streaming music services, funded by advertising, account for more than half of all their hours of listening. Marketers need to consider this trend in their marketing approach to gain a competitive edge.

HIGHLIGHTS OF TRENDS



Below are summary findings that can be explored by country in the full report.



Technology Trends

The biggest movement in the home technology space that we see in our study is in voice-activated assistants – such as Amazon’s Echo and Alexa, Google’s Home and Apple’s HomePod – becoming both more prevalent and increasingly being used “very often.” We report an overall 30% increase in usage in the installed base, most coming from Baby Boomers and Gen X’ers. Millennials showed modest growth but Gen Z almost zero growth. These same splits are observed in the frequency of usage of these devices. **As these devices gain greater foothold in daily life, they could disrupt other technologies and herald the adoption of other technology-enabled household tools (remote-controlled heating systems, door locks, etc.) as part of the world of connected devices powering the Internet of Things.**

In the workplace, there is a growing acceptance of the inevitability of work being taken over by robots and Artificial Intelligence (AI) in the future. When asked if they can see their job being performed by a robot or AI, seven out of 10 workers admit to the possibility that this could happen. Baby Boomers are most resistant to the idea of their jobs going away, but that is slowly eroding. Opinions on this topic are more consistent by country this year and younger people remain slightly more positive about this than their older peers. Perhaps surprisingly, in most countries a sizable minority (around a quarter), especially the younger generations, feel that robots and AI taking over work will make the world a better place. Only in China is the position reversed in that a majority feel that robots and AI taking over work will make the world a better place.

While there is a strong belief that blockchain is widely predicted to have a massive impact on every facet of commerce from payments to legal, only one in seven, across the nine countries studied, knows what a blockchain is.



Consumer Sentiment

Climate change continues to be prominent in political, social, economic and even religious discussion. Pressure groups such as Extinction Rebellion have become more vocal, and individuals such as Greta Thunberg attract attention to the issue around the world.

While we see little movement in the overall number of climate change believers, and a corresponding base of hardcore deniers of around one in 10 who don’t believe it is happening, we also observe a hardening of attitudes. People are becoming surer of their beliefs. In 2019, 44% of those who agreed that climate change was a reality were 100% sure it was; this now stands at 48%. At the other end of the scale, 34% of those who don’t think it a reality are 100% sure that it isn’t, up from 30% in 2019.

In the world of brands, we see a steep decline in trust of consumer reviews compared to a year ago. While consumer reviews are still the second-highest ranked source of information (behind talking to friends and family), the percentage of people who consider them their most believable source dropped from 30% to 23%. We see this drop across every country and every generation. In 2019, 37% more people selected consumer reviews as the most believable than chose independent websites. This year's results close the gap between those two options to just one percentage point.

The gig economy is a phenomenon of the modern world. Opinions on it are divided in our results, with approximately one in five – a sizable minority – considering it a “bad thing,” while 46% say it is a “good thing” and 31% are undecided.

There is some variation in opinion across countries; the UK is least in favor, with only 32% defining the gig economy as a “good thing,” while China is most in favor at 64% agreeing it is positive.

Attitudes towards elements of the gig economy are also mixed. On the proponents' side, a third agree that it is good for businesses since they don't have to pay wages when no work is being performed, and a similar number agree it is good for workers to have the freedom and flexibility to work when they want.



Trust and Privacy

As privacy concerns continue to mount, consumers are taking direct action against corporations. Rather than complaining directly or signing petitions, consumers have chosen a new weapon: buying power, choosing not to buy from or even engage with brands because of privacy concerns. Just as we reported in 2019, this year, one in four have abandoned a website visit, and a similar number deleted an app, or avoided downloading it at all, because of privacy concerns. Each of these actions, potentially, is a sale lost. In the background, we see a growing feeling around the world that consumers are losing control over their personal data, and that companies have been dishonest about how that data is being used. **Eight out of 10 people we interviewed strongly or somewhat agree that “consumers have lost control over how personal information is collected and used by companies.”** Seven out of 10 agree with the notion that companies have been dishonest about how personal data is being used. Both these measures are more strongly agreed with in 2020 than they were in 2019. Companies that act now to allay privacy concerns, mainly through transparency and increased consumer choice on what to share, may reap considerable business benefits.

In 2020, we have introduced the topic of the Attention Economy, the potential for consumers to monetize or exert control over their attention data. Interest is relatively high, as 63% classified themselves as at least “somewhat interested” with half of this being “extremely” or “very interested.” In all, one-third said they were extremely or very interested. Perhaps unsurprisingly, the younger cohorts were more interested than their elders. Four out of 10 Millennials and Gen Z'ers said they were very or extremely interested, dropping to one-third of Gen X'ers and only one in five Baby Boomers.

Issues of trust go beyond just personal information and commercial interests. For the first time we have included questions about the public's trust in various institutions and what we are told by them. On the media side we asked about TV news, radio news and newspapers. None of them command universal trust. For each, only around one in 20 trust them totally, and slightly fewer than one in 10 say they do not trust them at all. There is almost no difference by media type and little difference across generations. The same is not true, however, at a country level. The US is striking in its absence of trust. Over one in 10 do not trust the media at all, with TV news scoring worst at 16%, followed by newspapers at 14% and radio news at 13%.



Media Diet

Thanks to the rise of media formats that are adaptable to the individual, customizable and programmable by an algorithm based on their input, traditional broadcast TV and radio are in decline. **We are no longer passive consumers of media, but active agents in the process, with changing viewing habits and behaviors.**

Two generations, Millennials and Gen Z already consume over half their TV content either on-demand or via streaming services such as Netflix, Apple TV+ or Hulu. The same is true in radio for these generations: streaming music services (Pandora, Spotify, Apple Music, etc), funded by advertising, account for more than half of all their hours of listening. Overall, generations listen to roughly the same number of hours of radio, they just listen in different ways. As with television, we see a fast drop-off in the amount of broadcast radio being listened to, with the slack being taken up by streaming services.

In 2019, we noted distinct differences by generation in the total amount of hours spent online, and among the younger generation, the proportion of online hours was higher. That pattern repeats in 2020. Gen Z'ers consume more than twice as many hours online as Baby Boomers and almost twice as many as Gen X. Each successive generation is consuming more and more online content and spending more and more time in front of a screen.

To explore the comprehensive global study that closes the gap between trends and the environmental, societal and psychological factors that drive them ***click to download the full Global Trends Report***





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