



GLOBAL *TRENDS* REPORT 2020



FOREWORD

Researchers often focus on gathering facts – who, what, when, where, how many – as a way of uncovering insights. This report, our second annual edition, adds context to reveal the underlying attitudes and trends in behavior that bring research data and insights to life, helping brands and agencies add perspective to their data through the lens of trends.

Our 2019 report was met with tremendous interest across the research, product development and marketing communities. For the 2020 Global Trends Report, we sought to expand the scope of topics to offer greater insight into how consumers engage with today's world, especially given the pace of changing trends and tastes. So, this year's report, while revisiting major topics from the 2019 edition (including technology usage, media consumption, climate change, optimism and brand attitudes), examines new topics such as the attention economy, cryptocurrencies, blockchain, sidepreneurship and the gig economy.

We've also expanded our examination of consumer attitudes on privacy and data protection. An understanding of these attitudes is critical in enabling researchers to understand the ground rules for engaging and communicating effectively with consumers to benefit from their reliable, considered opinions.

We hope you find the 2020 Global Trends Report informative and insightful.



Jackie Lorch

*Vice President,
Global Knowledge Management*

EXECUTIVE SUMMARY

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%.

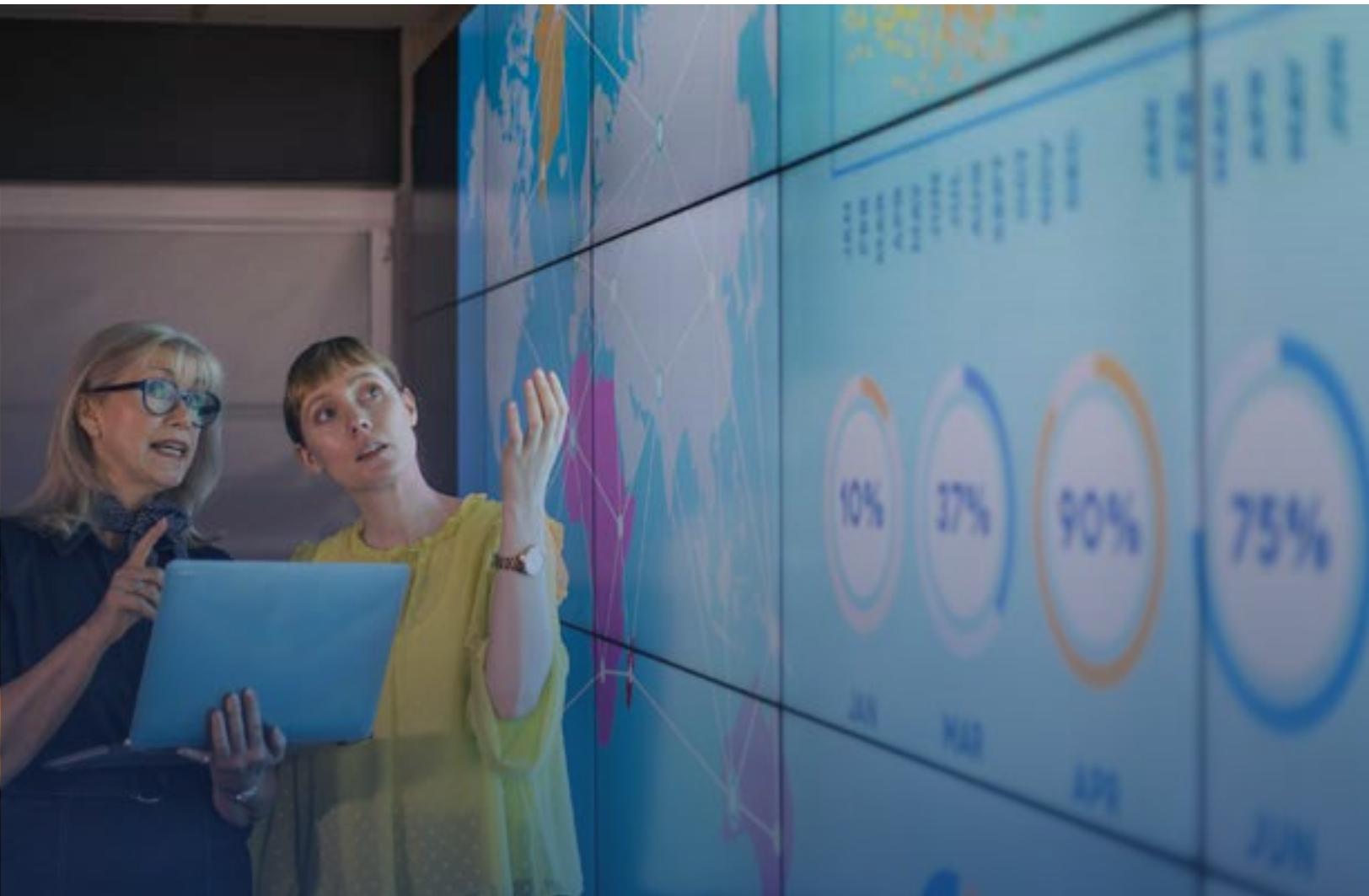


Media Diet

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.



METHODOLOGY

Participants were selected from across all Dynata's proprietary online research panel assets and the samples quota controlled to reflect the population on Age, Gender and Region. Interviews were conducted online.

For the 2020 report, Dynata conducted online interviews in the US, Canada, the UK, France, Germany, the Netherlands, Australia, Japan and China from Thursday, Oct. 10 to Monday, Oct. 14, 2019.

For the 2019 report, Dynata conducted online interviews in the US, Canada, the UK, France, Germany, the Netherlands and Australia from Tuesday, Nov. 13 to Monday, Nov. 19, 2018. These were augmented by interviews in China and Japan conducted Wednesday, Feb. 6 to Tuesday, Feb. 12, 2019.

Given these sample sizes the margin of error (at the 95% confidence level) is, at worst, +/- 3.6% (for China 2019) and, at best, +/- 3.0% (for Canada 2019).

	2020	2019
US	1022	1049
CANADA	1035	1093
UK	1022	1052
FRANCE	1035	959
GERMANY	1024	954
NETHERLANDS	1015	956
AUSTRALIA	1054	1046
CHINA	1039	730
JAPAN	1007	936
TOTAL	9235	8775

MEDIA CONSUMPTION DATA

Participants were selected from across all Dynata's proprietary online research panel assets and the samples quota controlled to reflect the population on Age, Gender and Region. Interviews were conducted online.

For the 2020 report, data was collected Thursday, Oct. 17 to Wednesday, Oct. 30, 2019.

For the 2019 report, data was collected Thursday, Feb. 14 to Tuesday, Feb. 26, 2019.

Given these sample sizes the margin of error (at the 95% confidence level) is, at worst, +/- 3.3% (for Australia 2019) and, at best, +/- 3.0% (for US 2020).

	2020	2019
US	1062	974
CANADA	1005	971
UK	1021	944
FRANCE	1037	975
GERMANY	1044	963
NETHERLANDS	988	1201
AUSTRALIA	979	887
CHINA	995	1001
JAPAN	1048	982
TOTAL	9179	8898



GENERATIONAL DEFINITIONS

Only one “generation” has a (reasonably) universally accepted definition: Baby Boomers, said to be those people born immediately after WWII (1946) up until 1964. This generation spans approximately 18 years and, in 2020, comprises people between the ages of 55 and 73.

Naturally, there is an agreed starting point for Gen X, the generation that followed Baby Boomers. This is often considered to end between the late Seventies and the beginning of the Eighties. Our definition follows this convention, placing those born between 1965 and 1981 into Gen X, currently aged 39 to 54.

After these two generations, naming and definition becomes a little less distinct. The generation after Gen X is most often called the Millennial generation because the first of them came of age at the turn of the century. Where it ends is less precise. 1996 is a common endpoint, which we have adopted. Thus, they are aged to 23 to 38.

The latest generation identified is Gen Z, and our definition starts at 1997. Many of these are still too young to be interviewed for market research, so this year’s report includes about half of this cohort, currently aged 16 to 22.

A woman with dark hair and glasses is shown in profile, looking towards the left. She is wearing a dark, high-collared top. The background is a dark, blue-toned environment with glowing, out-of-focus light spots (bokeh) and several bright, thin lines of light that appear to be part of a digital or data visualization. The overall mood is futuristic and technological.

TECHNOLOGY

trends

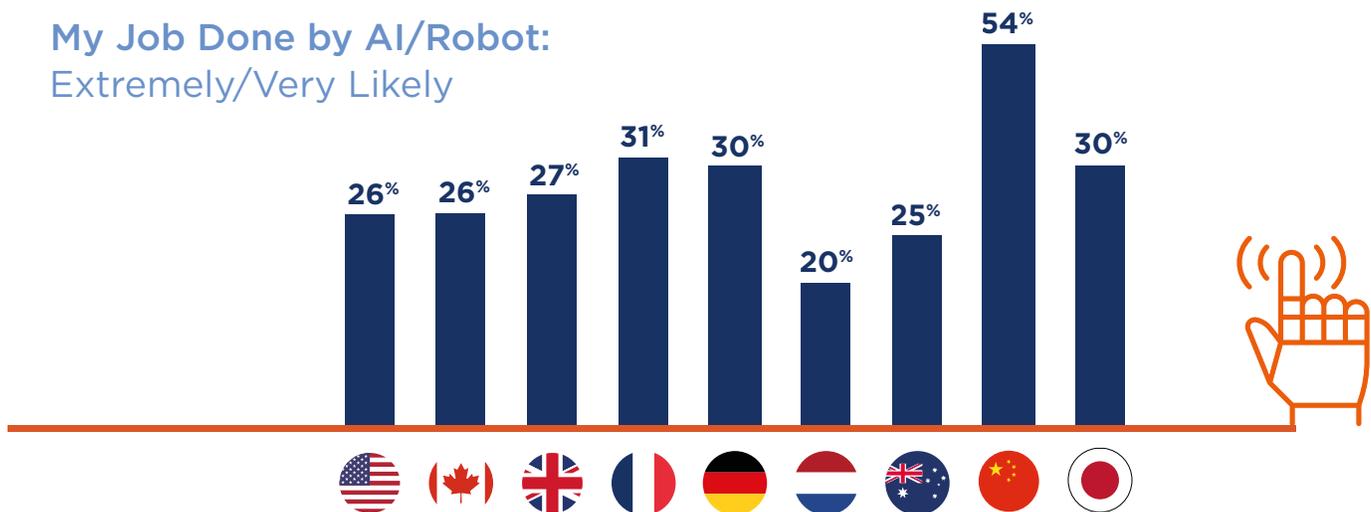
AI & ROBOTS

The belief that robots and AI technology will replace jobs in the future is growing in some generations, with 43% of Gen Z'ers thinking it extremely or very likely it will happen to their job. This opinion is significantly lower among the older generations, with only a fifth of Baby Boomers seeing it as extremely or very likely that their work will be done by AI or a robot.

Opinions on this topic are more consistent by country in 2020 when compared to the previous year's report. Again, the highest acceptance is in China with 54% believing it's extremely or very likely AI or a robot could do their work, followed by France at 31%, Japan and Germany 30%, the UK 27%, Canada and the US 26%, Australia 25% and the Netherlands at 20%.

Younger people are slightly more positive about this than their older peers, with 29% of Gen Z saying the world would be a better place if this happened, compared to 21% of Baby Boomers. By country the scores hover around 20% for each country, with Japan and China as the two outliers of positivity at 35% and 54%, respectively.

My Job Done by AI/Robot: Extremely/Very Likely



MEETINGS AT WORK

Three-quarters of our working participants report they have some type of business meetings. This was consistent across all countries except for Japan, where only 55% had meetings, and China, where almost everyone (93%) had meetings of some sort.

In addition to frequency, the participants in those meetings differed for China and Japan; 84% of workers in China hold meetings with colleagues, compared to only 47% of Japanese. For the other countries in the study, this number was close to two-thirds. Client meetings were held by close to three in 10, again higher in China and slightly lower in Japan.

More interesting is the form that these meetings take, and it changes by generation. Face-to-face meetings are more common among older generations with Baby Boomers reporting 70% of their meetings being conducted in-person only. This compared to just half of Gen Z's meetings. Predictably, the percentage drops for Gen X to 62% of meetings face-to-face, with Millennials lower still at 54%.



Face-to-face meetings are more common among older generations with **Baby Boomers reporting 70% of their meetings being conducted in-person only**. This compared to just half of Gen Z's meetings.

Japan's unique business culture is highlighted by the fact that 70% of all meetings are face-to-face only. For other countries, this figure ranges from around half in China and the US to around 60% in the UK, France, Canada, and Germany.

By examining preferences, we can see where the future is heading. Twice as many Gen Z'ers prefer video conference calls compared to Baby Boomers. The difference is even greater for telephone meetings, with almost three times the number of Gen Z'ers as Baby Boomers preferring phone. Face-to-face meetings remain the most preferred format for a business meeting, but the generational difference appears here also, with eight out of 10 Baby Boomers preferring face-to-face compared to 70% of working Gen X'ers and 62% of working Millennials.

BRING YOUR OWN DEVICE

Employees, often to the dismay of IT departments, like to use their personal devices for work purposes. This phenomenon has a name, "Bring Your Own Device" (or BYOD), and is a widespread practice changing the modern work environment.

Fifty-four percent of working people in our sample use a laptop at work, and of this group, seven out of 10 use their personal laptop, although not necessarily exclusively. This rises to 80% of Gen Z'ers compared to two-thirds of Baby Boomers and Gen X'ers.

The BYOD phenomenon is even more common with smartphones, with half of those we asked using a smartphone for work purposes and almost eight out of 10 of them using their own device. BYOD is a trend seen all over the world and for all devices, even desktop PCs.

With these trends in mind, the concerns about corporate data security appear to be well-founded. One-third of those using their own device did so while at work offsite, with a similar number doing so on the journey to work. Less concerning, or at least more controllable, is the prevalence of BYOD onsite with half doing this, and a higher number (63%) using their own device at home.



54% of working people use a laptop at work **-seven out of ten** using their personal laptop.

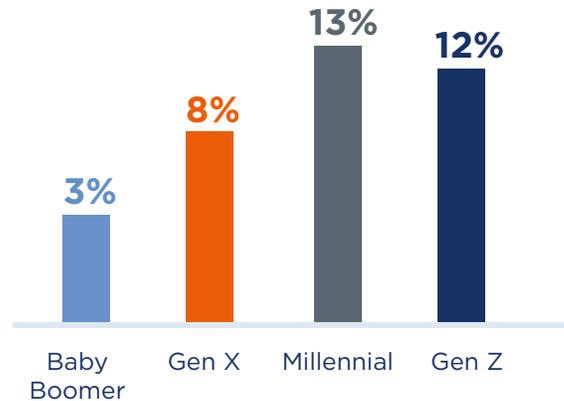
TECHNOLOGY ADOPTION

Our attitudes to technology change as we age and become less willing to adapt to and adopt change. Baby Boomers, who likely would have been quick adopters when younger, are now more resistant. Therefore, we expect only very slow change, if any at all, in our technology adoption rates.

Across the generations we observe around 3% of Baby Boomers considering themselves among the first to adopt technology; this increases to 8% of Gen X'ers, peaks at 13% of Millennials before dropping slightly to 12% of Gen Z'ers.

“Who are quick adopters?”

When looking at early adopters of technology – those who adapt quite quickly – we unsurprisingly see 49% of Gen Z'ers falling into this category, followed by Millennials at 47%, Gen X'ers at 36%, and 25% of Baby Boomers.



The flattening of the adoption rate between Millennials and Gen Z may be related to purchasing power and the ability to adapt to new technology. Alternatively, it may be simply because there has been little new technology to adapt to during their adulthood, it all being part of their daily life.

While we expect persistence over time within a country, there are differences between countries that are very apparent. China continues to have the highest level of early adopters, with two-thirds of Chinese participants falling into this category in both 2019 and 2020, whilst Japan continues to have the lowest level of early adoption.

Outside these two countries around a third of all people are early adopters of technology, and just under one in 10 (8%) say they are among the very first. At the other end of the scale to those who readily embrace technology are those who adopt slowly or are among the last to engage with new technology. Except for China (averaging 12% across the two years), just over three in 10 are among the last to engage, ranging between 28% in the UK and 36% in Japan.

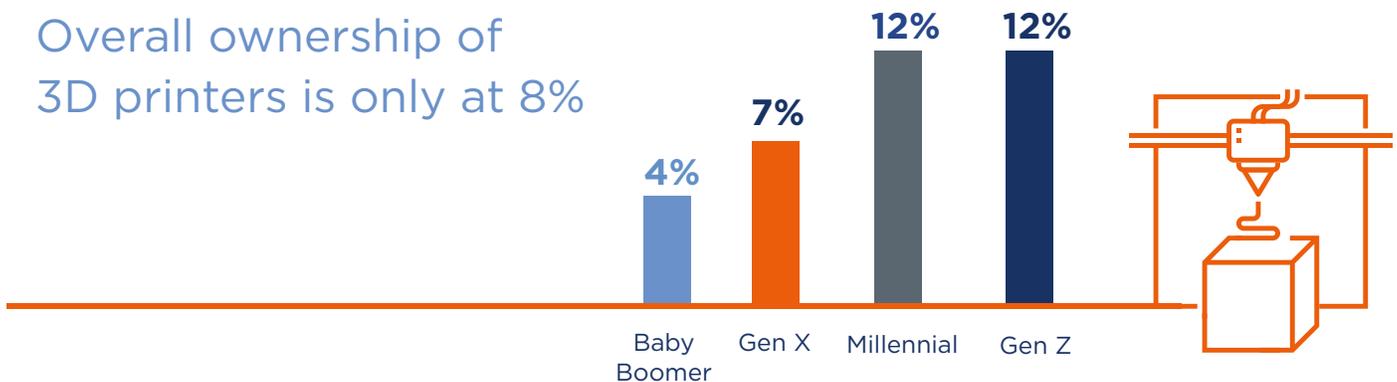


DEVICE USAGE AND INTERNET OF THINGS

In 2020 we can expect to see the range of connected devices continue to grow in the marketplace. While some, like 3D printers, have commercial/industrial applications as well as consumer ones, most of the devices we looked at are directly consumer-facing. We have deliberately chosen to look at less well-established product classes to see if they develop into the mainstream or remain a niche product, or perhaps die away altogether.

While they have yet to make their way into people's homes at scale, 3D printers may become more mainstream as prices come down and utility increases. Gartner's Hype Cycle for 3D printing (published in July 2018) positioned consumer 3D printing as being on the downward slope towards the "trough of disillusionment" and predicting it only reaching the "plateau of productivity" in five to 10 years' time. It is not surprising, then, to see overall ownership at just 8%. The number is higher among Millennials (12%) and Gen Z (12%) than among Baby Boomers (4%). Only in China are there substantial numbers claiming to own such a product.

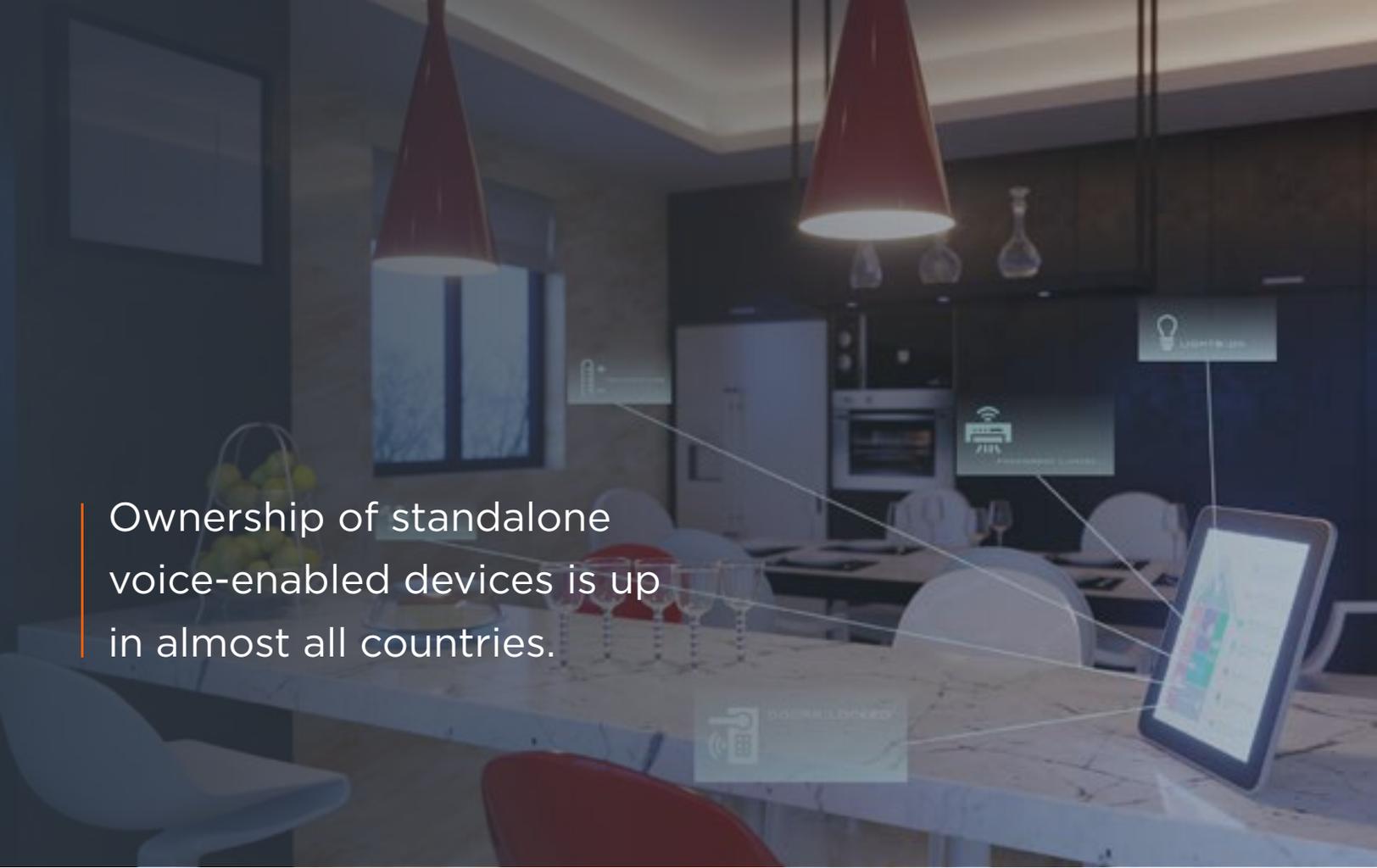
Overall ownership of 3D printers is only at 8%



Like phones before them, truly portable devices have gained more interest from consumers. Fitness trackers, which are often integrated directly into phones themselves, are reasonably common, if not yet mass-market. Fitness band ownership hovers around one in five, with almost no movement at all year over year. Ownership rates are less differentiated by generation compared to smartwatch ownership.

Smartwatches, often featuring fitness tracking capabilities, are slightly more popular overall. Last year we recorded a fifth owning one; this year it is almost a quarter. As with most technology, smartwatches are more common with younger generations.

The final two device classes, keyless locks and distributed music systems, are still minority products and show little sign of taking off into mass-market. Keyless locks could be affected by an issue of the effort of retro-fitting existing locks, as well as the perception of being a "solution to a problem you don't have." Only around one in 10 reported having such locks in their home. Distributed music systems, like Sonos, are slightly more popular but are not making headway at only around 13% ownership this year. They may remain a niche product given their cost and the ubiquity (and low cost) of Bluetooth-based devices using a smartphone as the music source.



Ownership of standalone voice-enabled devices is up in almost all countries.

While the focus of Dynata's trends research within technology has been on people's engagement with it, the technological infrastructure - though largely invisible to consumers - could increase the adoption and use of mobile and connected devices even further. Fifth generation wireless technology, or 5G, is the latest development and it is being rolled out gradually in many countries across the globe over the next several years, bringing the promise of vastly improved speed, increased data transmission capacity, and lower latency (higher responsiveness) for devices connected to the internet wirelessly. This means smartphones can handle data-heavy tasks faster and with more consistency, greatly improving streaming video and providing a benefit to AR/VR applications, perhaps bringing VR headsets more into the mainstream.

Another key aspect of 5G is its ability to connect devices at a much larger scale. The focus of technology over the past three decades has been mostly on connecting people, but this is now shifting to connecting things, or devices, leading to the creation of The Internet of Things (IoT), a world of internet connected devices expected to expand vastly over the coming years. **Connected or smart devices will play a larger, more essential role in people's lives, generating massive amounts of data for harnessing, with care, to inform business decisions.**

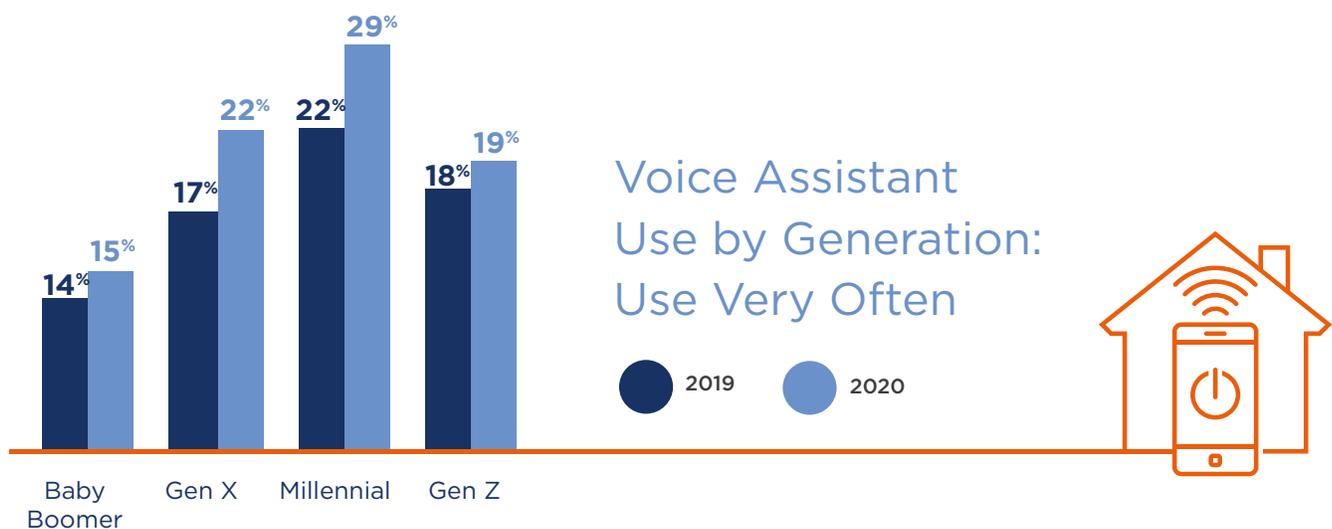
Connected or smart home devices are among the most tangible ways in which technology is impacting one's personal living space. These devices allow for control, often through voice assistants, smartphones, tablets, or computers, of numerous aspects of the home environment - lighting, appliances, air quality/purification, even monitoring the interior and exterior of the home via video.

As we reported last year, the incidence of ownership of such devices is relatively low. The most common application owned in the set we are testing is central heating remotely controlled from outside the home. This was owned by some 14% in 2019, rising slightly this year (16%).

Remote door monitoring has grown by two percentage points over the year, as have remote controlled light switches, another aspect of home security. Both air quality monitors and remotely-controllable appliances remain very much in a minority at around 9% and 13% adoption, respectively.

One of the most significant developments in consumer-facing technology has been the proliferation of voice assistants and voice-activated devices. Historically, touch has been the primary way of interacting with technology and more broadly the devices that most people use regularly. The flip of a switch, the click of a mouse or the swipe of a finger – all replaced by simply speaking.

The adoption of smartphone-enabled voice assistants should grow organically along with the smartphone upgrade cycle. It is no surprise then to see a three percentage point increase in ownership among Baby Boomers, four points among Gen X'ers and two points among Millennials. Usage of the voice assistant is also growing, more so among the younger generations. For Baby Boomers we see little change from 2019's study. We do see, however, a five point increase among Gen X for usage "very often," as well as a seven point increase for Millennials and one point among Gen Z.



While the smartphone provides a common access point for voice-enabled tech, standalone devices (often linked to the phone by specific apps) are increasingly making their way into the home. While not the only options available in the marketplace, Amazon's Echo and Google Home have led the way in the concerted push for consumers to adopt this tech in their homes, producing higher ownership rates.

Ownership is up in almost all countries, most dramatically in China at +20 percentage points followed by Canada at +10 percentage points, the UK and the Netherlands both at +7 percentage points. Adoption of voice technology has also increased year on year among all generations, with the exclusion of Gen Z.

Unsurprisingly, frequent usage of such technology has also increased by 4 percentage points among Baby Boomers, 1 percentage point among Gen X and 9 percentage points among Millennials. Gen Z, by contrast, is down 10 percentage points. The gap between the usage of voice technology among the various countries is beginning to shrink as this technology continues to become more widespread.



SMARTPHONE OWNERSHIP

Smartphones, dubbed “the ubiquitous technology” in last year’s report, remain the most-owned type of technology device, with over nine out of 10 participants reporting ownership. This is essentially unchanged year on year.

The bulk of non-ownership is in the Baby Boomers Generation.

Only Canada and Japan report smartphone ownership below 90%. Japan has a long history of alternative “smart” phones that pre-date the launch of the iPhone. Of note, however, is a 4 percentage point increase in smartphone ownership in Japan in the last year, seemingly driven by increases in Apple iPhone sales, and we expect the gap between Japan and other countries to narrow over time. Canada is consistent year over year, with 87% last year and 88% this year owning a smartphone. This appears almost entirely driven by a marked reluctance on the part of Canadian Baby Boomers to own smartphones, compared to their counterparts around the world. We would not expect this to dramatically change in the future.

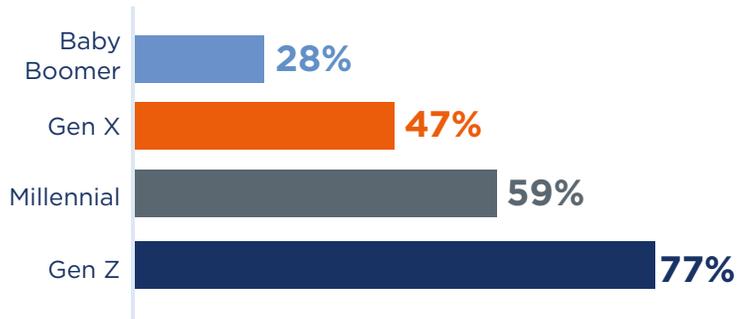
With the decline in PC/Laptop sales and usage, smartphones – with apps for shopping, entertainment and travel, among others – have become the device of choice for many. Brands have noticed, with most companies following a “mobile first” digital strategy when engaging with users. Researchers need to also be mindful of this. Many research projects, even today, do not allow mobile traffic to them. This may be because the survey itself contains custom tools that will not work on a mobile device or are impossible to do successfully on a small screen (like a Conjoint perhaps). Often it is a misguided attempt to retain some consistency in sampling, knowing that mobile survey-takers are potentially different to those who take surveys on a PC. Both practices risk mis-stating the truth due to non-coverage of the mobile population.

Almost half of all survey starts both this year (47%) and last (45%) were on smartphones. We are at a tipping point, with 47% of survey starts being on a PC or laptop (the same in both years). This gives some indication of the non-coverage that comes from not allowing mobile. By generation, this is even more stark, with three-quarters of all survey starts by Gen Z'ers on mobile. Six out of 10 by Millennials are on mobile. Only among Gen X and Baby Boomers do fewer than half of all survey starts take place on mobile, about a half by Gen X and a quarter by Baby Boomers.

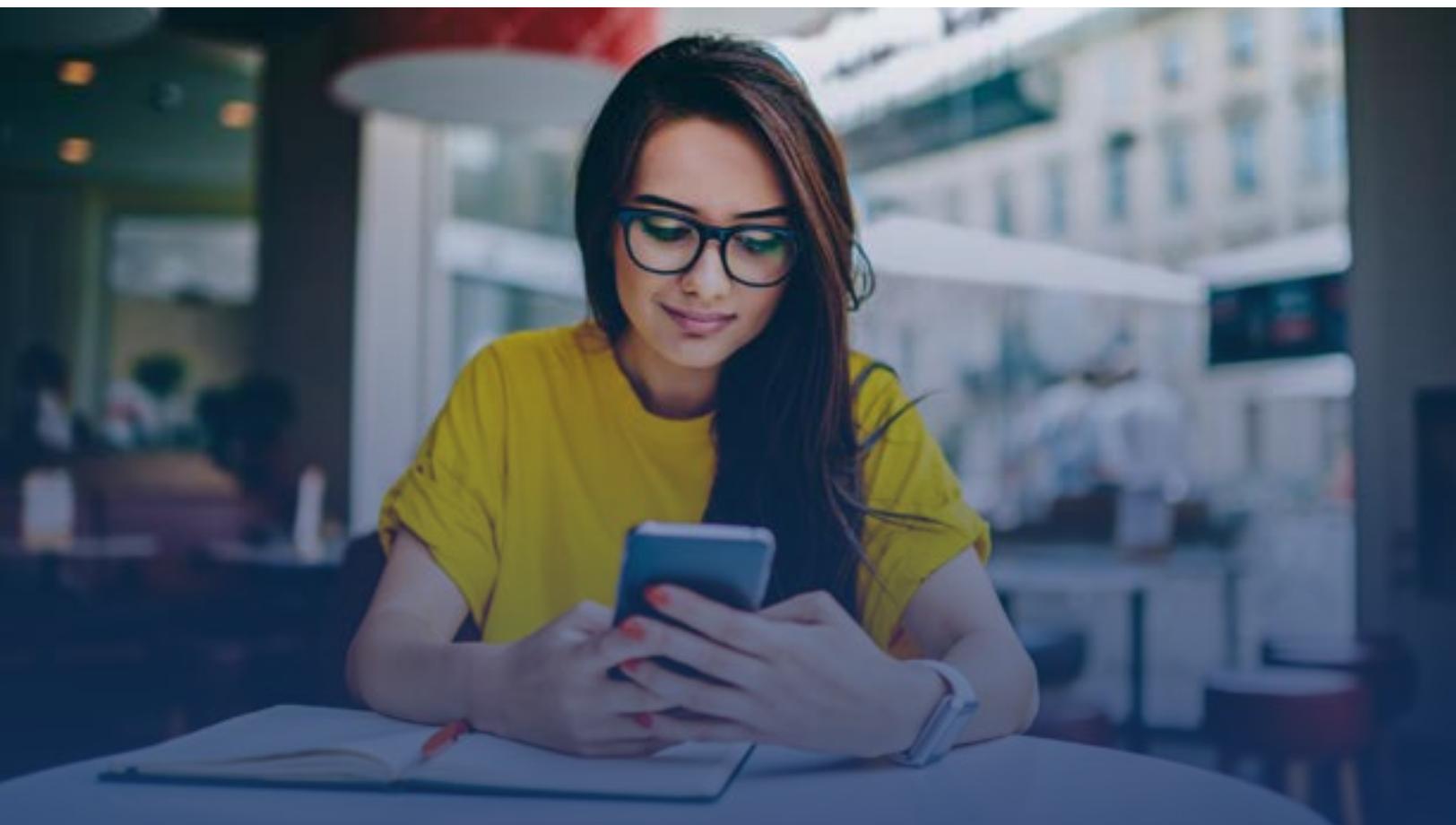


47%
of all survey
starts were on
a smartphone.

Mobile Survey Starts by Generation



Every country in the report has seen an increase in the proportion of survey starts coming from smartphones. Australia is up 5 percentage points, Canada and the UK up 4 percentage points. Three countries - the US, Japan and China - already have most of survey starts coming from smartphones, albeit only just.





When shown potential descriptions of blockchain, only 27% could correctly identify the one that described blockchain, while **44% picked one of four “decoy” definitions.**

BLOCKCHAIN AND CRYPTOCURRENCIES

According to our survey, blockchain technology – an immutable, distributed ledger used to record transactions – is still a long way from being mainstream. Half of the people we asked had never heard of the concept, an additional third have heard of it but don’t know much about it and less than 20% know enough to explain it. As expected, Baby Boomers are least likely to have knowledge of it, with 60% never having heard of it. Millennials are the most informed generation, but even among them, only 25% could explain or discuss the topic in detail. By country, the UK was the least aware of blockchain with 61% unaware. Other countries posted “unaware” levels between 50% and 60%, with Japan and China the most aware, reporting 42% and 10% respectively unaware.

Awareness is very high in China compared to other countries, yet those in China are the least likely to be able to correctly identify what it is. Japan, the US, Canada and countries in Europe show similar levels of blockchain knowledge. When shown potential descriptions of blockchain, only 27% could correctly identify the one that described blockchain and a quarter selected “none of these” or “don’t know,” while a little under 50% picked one of these four “decoy” definitions: a faster, secure VPN; anti-virus software using AI; more efficient memory access; or a faster, more private cellular network.

When asked about cryptocurrencies, the US lags behind other countries in awareness of Bitcoin, the most renowned cryptocurrency, with just 64% of Americans having heard of it compared to 81% in the Netherlands. Across all our countries, other cryptocurrencies were known by fewer than one in five – only 12% are familiar with Litecoin, 15% aware of Ethereum, and single digit awareness for Zcash, Dash, Ripple, Monero, Neo, Carano and Eos.

Thirty percent of Americans say they own Bitcoin, compared to an average of just 24% across all countries studied. Ownership of the other currencies we asked about was in the low single digits.

CONSUMER *Sentiment*



WORK-LIFE BALANCE

As with our Global Trends Report 2019 survey results, satisfaction with work-life balance is high, with half of everyone saying they have an extremely or very good work-life balance and 89% believing their work-life balance is somewhat good or better. And once again, younger people say they have a better work-life balance than older people, with 59% of Gen Z thinking the balance is extremely or very good compared to 47% of Baby Boomers.

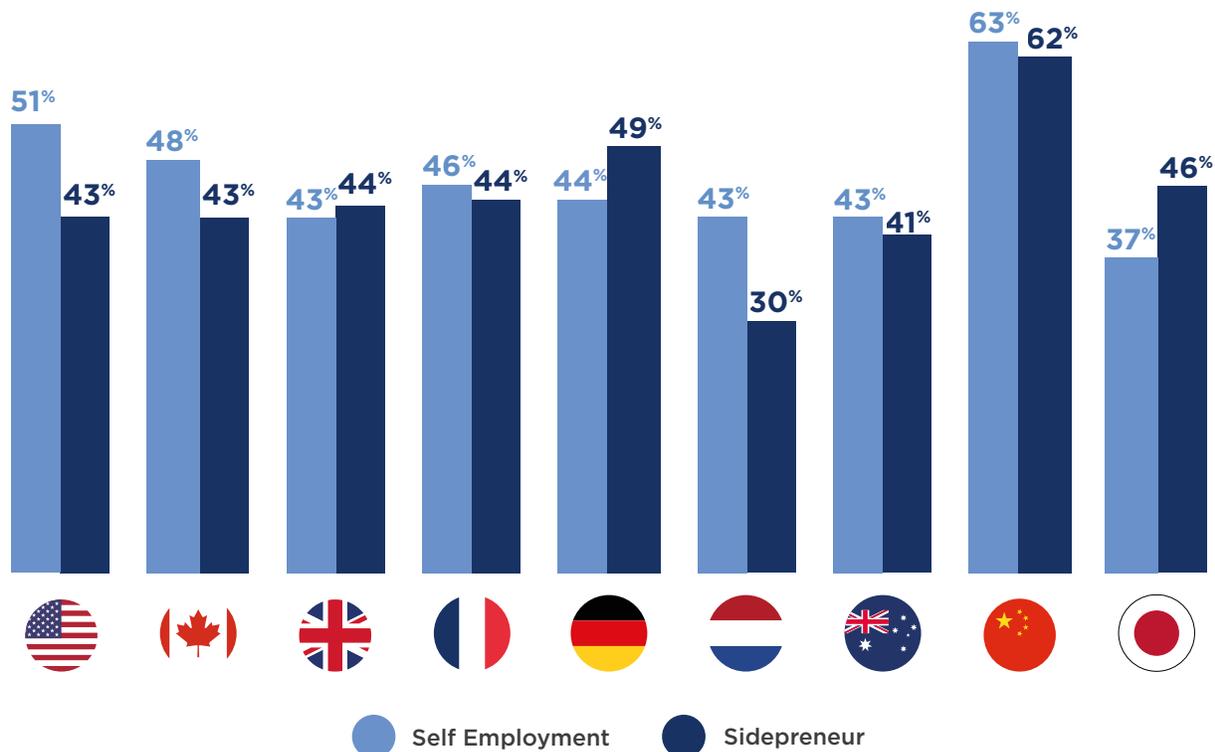
Ironically, and despite well-publicized guidelines to promote work-life balance, satisfaction with that balance in France is lower (46% saying it's extremely or very good) than in the US, where the culture promotes longer work hours and shorter vacations. Sixty-two percent of Americans say their work life balance is extremely or very good. Japan, with its culture of dedication to the company, is most dissatisfied with just 28% saying their balance is very or extremely good.

Satisfaction with work-life balance is high, with half of everyone saying they have an extremely or very good work-life balance and **88% believing their work-life balance is somewhat good or better.**

SELF EMPLOYMENT

We see much more enthusiasm among younger generations for flexible work schedules. Fifty-seven percent of Gen Z'ers are very or extremely excited by the idea of being self-employed, and 52% love the idea of being a "sidepreneur." Just 33% and 31% of Baby Boomers find these ideas exciting, respectively.

Other Employment Models: Extremely/Very Exciting



Other than China, the US is the most excited by the opportunity to change their work schedule, with 51% of Americans being extremely or very excited about self-employment and 43% feeling the same way about sidepreneurship. However, these numbers are down from last year, when 57% gave the same rating to self-employment and 52% to sidepreneurship. In contrast, scores went up in France (from 40% to 46% for self-employment and 37% to 44% for sidepreneurship). Scores also rose in Canada, the Netherlands (for self-employment only) and China, while dropping in Germany and Japan for both choices.

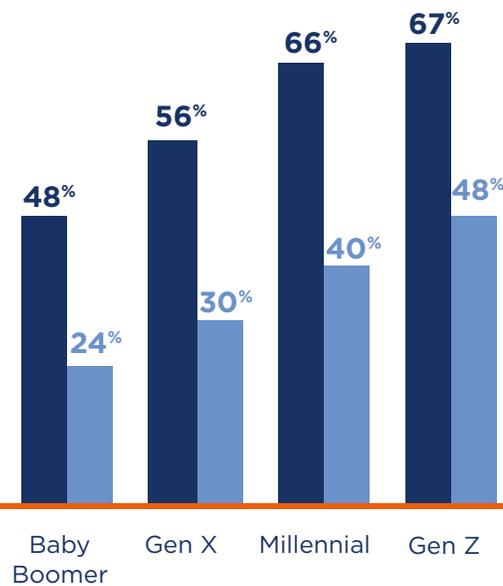
A **sidepreneur** is someone starting a business while working full or part time.

THE GIG ECONOMY

One of the biggest trends of recent times has been the rise of the gig economy, **defined in the survey as an economy in which workers are paid only for the work they actually do**. In effect they are independent contractors to the company that pays them. Estimates differ widely as to the size of the gig economy due to differing definitions.

Heard of/Work in the Gig Economy by Generation

● Heard of it ● Work in it





When we asked our participants if they're working in the gig economy, fully one in three said that they were. This is much higher than when compared to most accepted statistics on the "self-employed" or "independent contractors," highlighting the definitional problem therein. Our survey is consistent across countries, though varies by generation, not surprising given the types of work available in the gig economy. For example, twice as many Gen Z'ers identify as members of the gig economy as Baby Boomers. More important than the actual numbers are attitudes towards the gig economy as a phenomenon, an indicator of how it might grow, if at all, in the future. Opinions 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 with 64% agreeing it's positive.

Attitudes towards elements of the gig economy are also mixed. On the proponents' side, a third agreed that it is good for businesses since they don't have to pay wages when no work is being performed, and a similar number agreeing it is good for workers to have the freedom and flexibility to work when they want. Three in 10 recognize that companies can take advantage of global creative talent through the online gig economy.

The UK is least in favor with only 32% defining the gig economy as a "good thing," while China is most in favor with 64% agreeing it's positive.

Not everyone agrees that it is a positive, however; 16% believe the gig economy is bad for businesses since they cannot plan their workforce accurately. A much higher number (35%) agree it is bad for workers who have fewer rights or employee benefits, if any. A quarter believe that the incomes of creatively-talented people are adversely affected by the gig economy.

Our participants were also split on whether it is a positive for the overall economy. In a gig economy, tax receipts for governments shift from income tax to corporation tax, assuming companies make more profit and workers are paid less. Just under a quarter (23%) thought it would be good for the economy through increased corporation tax, with almost the same (21%) believing it would be bad because of the reduction in income tax.

We expect these attitudes could harden in the future and become more divided as the gig economy grows. One change that will almost certainly occur is a reduction in the four in 10 who told us they had never heard of the gig economy.



Normally, fear levels rise as you move further away from home, but we observe some interesting anomalies.

SOCIETY

To best understand the level of fear within our society, one should focus not on how safe we feel within our own local communities, but rather how levels of fear rise as we move further out to our town or city, country and eventually to other countries. Normally, fear levels rise as you move further away from home, but we observe some interesting anomalies.

As we saw in 2019, in both Australia and Canada, there is virtually no change in fear levels between town/city and country. For these countries, this produces what appears to be a sizeable disparity between the “home nation” and “foreign countries.” Both Australia and Canada are large countries which, one might think, would lead to greater levels of unfamiliarity between town/city and country and therefore greater distrust; other factors, however, such as relatively sparse populations and homogeneous cultures (notwithstanding the language differences in Canada) might play a role. The same is not true of the US, also a large country, where we observe the second largest drop off between town/city and the country.

China presents an interesting case. In both years, it shows almost no drop off between the neighborhood, the town/city and the country. In fact, in 2019 the country was deemed safer than the neighborhood, and in 2020 there has been a substantial rise in the numbers deeming their society safe.

In almost all countries there has been a rise in the number of people thinking their neighborhoods to be extremely or very safe. Only the UK bucks this trend, where it is flat (58% vs 57%) year over year.

As we concentrate on the generations, we continue to see that the level of fear of the “older” increases with age. Whether this comes with age or is a result of reduced exposure to other cultures among older people remains to be seen over time.

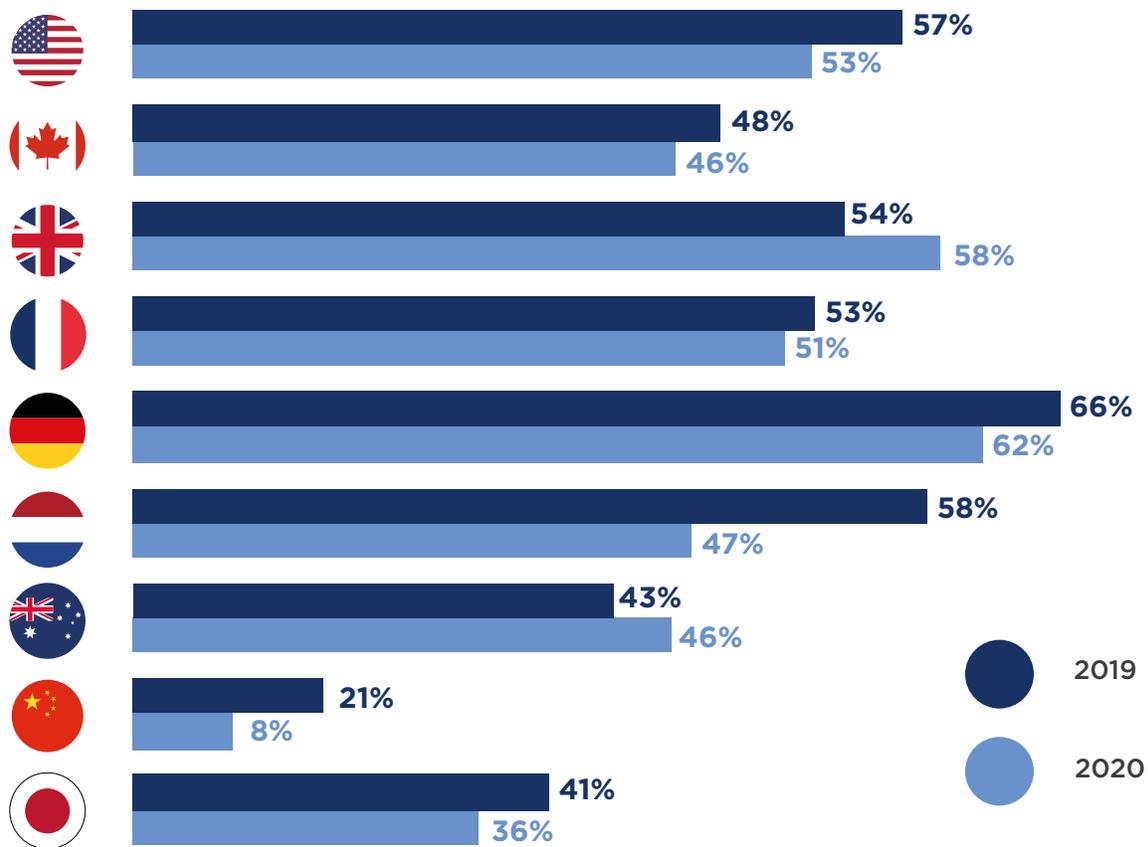
One factor that is driven by age is the perception of the crime rate, historically decreasing over time by almost every measure. In both years just over half of all Baby Boomers feel that the crime rate is increasing. Even when the majority don’t think it is going up (as is the case for Gen X, Millennials and Gen Z), few recognize it is going down (only around one in ten). China continues to be the only country where the majority reports that crime is going down; fewer than one in five think it is on the rise.

In only one country has there been a significant rise in the number of people feeling that crime is going up; Canada is up from 37% to 43% (although still the lowest outside China). By contrast, Canada's neighbor to the south, the US, is the one country that shows a significant decrease in the number of people who think crime is on the rise, down eight percentage points from 51% to 43%. All other countries are relatively static.

Fear of outsiders, the "other," along with a perception of an increase in crime, might feed into a feeling of a lack of cohesiveness in society. And this is very much in evidence. Feeling that society is more together today is, except for China, a minority position to hold. Around one in 10, irrespective of country, feels this way. This rate is very much driven by Millennials, with one in five Millennials feeling society is more together. This halves to one in 10 Gen X'ers, then halves again to one in five Baby Boomers. Gen Z is even higher than Millennials, at just under three in 10.

The majority view in most countries is that society is becoming more divided. Germany remains the country feeling most divided, with two out of three Germans feeling this way. China is most volatile year over year, as the number feeling it is a more divided nation has halved this year; 2019 was the 70th anniversary year of the People's Republic of China, which may have played into a heightened sense of cohesiveness.

Society Cohesiveness: Society is More Divided



The UK's decision to leave the European Union ("Brexit"), divides the nation politically and may be influencing our measure as well. The UK is the second most divided country in our survey with 58% of the nation now feeling it is more divided than before, up 3% since 2019.



SOCIAL ATTITUDES

When asking about social attitudes, we recognized that some terms don't translate across cultures, so cross-country comparisons are not enlightening. "Liberalism" and "Conservatism" are examples of this. In some countries they are viewed as opposites, while in others they are similar, and in yet others they are concepts not easily described or understood. But when we compare these terms by generation, a theme emerges: younger people are more likely to fully embrace either of these attitudes than older generations, viewing themselves as "perfectly" described by the terms, even though the terms are different or opposite. Seventeen percent of Gen Z'ers identify themselves as "perfectly" liberal, and 13% say they are "perfectly" conservative. Just 9% of Baby Boomers describe themselves as perfectly fitting each term.

This pattern holds across every attribute we asked about: movie-loving, charitable, sociable, socially conscious, environmentally aware, optimistic and competitive. In each case, Gen Z was most likely to say these terms "perfectly" describe them, with certainty diminishing by generation in almost every case, and much lower among Baby Boomers for every attribute.

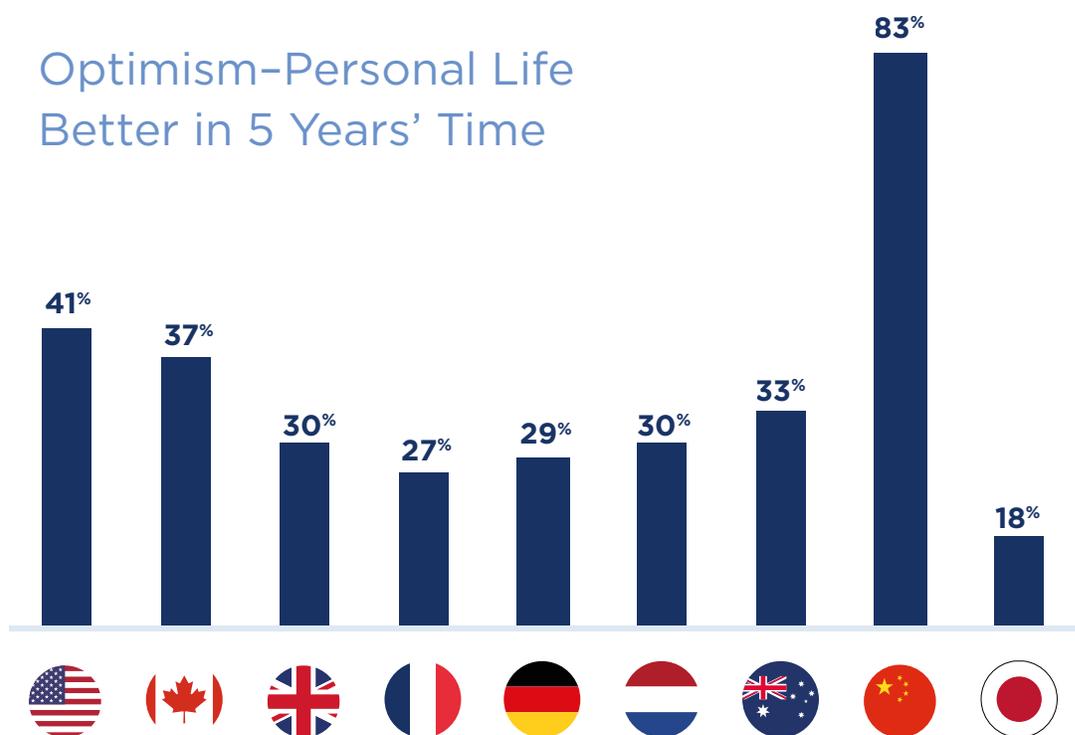
It may come as a surprise to some that the US falls in the middle of the pack when it comes to competitiveness, finishing fifth. Country rankings for competitiveness, from most to least, were as follows: China, Germany, France, Canada, the US, the UK, Australia, and the Netherlands. The scores ranged from a high of 63% to a low of 41% saying they are perfectly or mostly competitive. Japan, with its collectivist culture, lags far behind, as expected; just 25% of Japanese considering themselves competitive.

Younger people are more likely to fully embrace social attitudes than older generations, viewing themselves as "perfectly" described by the terms, even though the terms are different or opposite.

CONSUMER OPTIMISM

Little has changed on the topic of consumer happiness and optimism since the 2019 study, with one or two notable exceptions. China's optimism is even stronger, and the US is the one country where optimism has declined across every question we asked.

When asked if the world would be a better, a worse or the same place in five years' time, 18% thought it would be a better place. In 2019, 26% of Americans thought the world would be a better place in five years' time, compared to 19% in 2020. When asked the same question about their personal life in 2019, 48% of those in the US thought their life would be improved, dropping to 41% in 2020. Last year, 52% of Americans thought their five-year financial prospects would be better, but only 44% feel the same this year. Finally, 17% of Americans said they were extremely happy last year but this year only 13% agree.



Even so, America is still happier than all countries studied, other than China, based on “extreme happiness.” Overall, only 8% of the people we interviewed said they were extremely happy, with the UK, France, Germany and the Netherlands all recording 6% on this metric, and Japan and Australia at 7%. Overall, 38% of people said they were either extremely or very happy, while 46% of Americans agreed with this. Percentages for Europe were very consistent with the UK and the Netherlands at 36%, France at 35% and 32% for Germany.

When looking at the data by generation we still see the optimism of youth, with Millennials and Gen Z feeling better than Baby Boomers and Gen X on every measure. However, Gen Z participants are less happy and optimistic than they were last year, when 33% of Gen Z thought the world would be a better place in five years' time. That number dropped to 26% in this year's poll. Likewise, 46% of Gen Z said they were extremely or very happy in 2019, yet only 39% feel that way now.

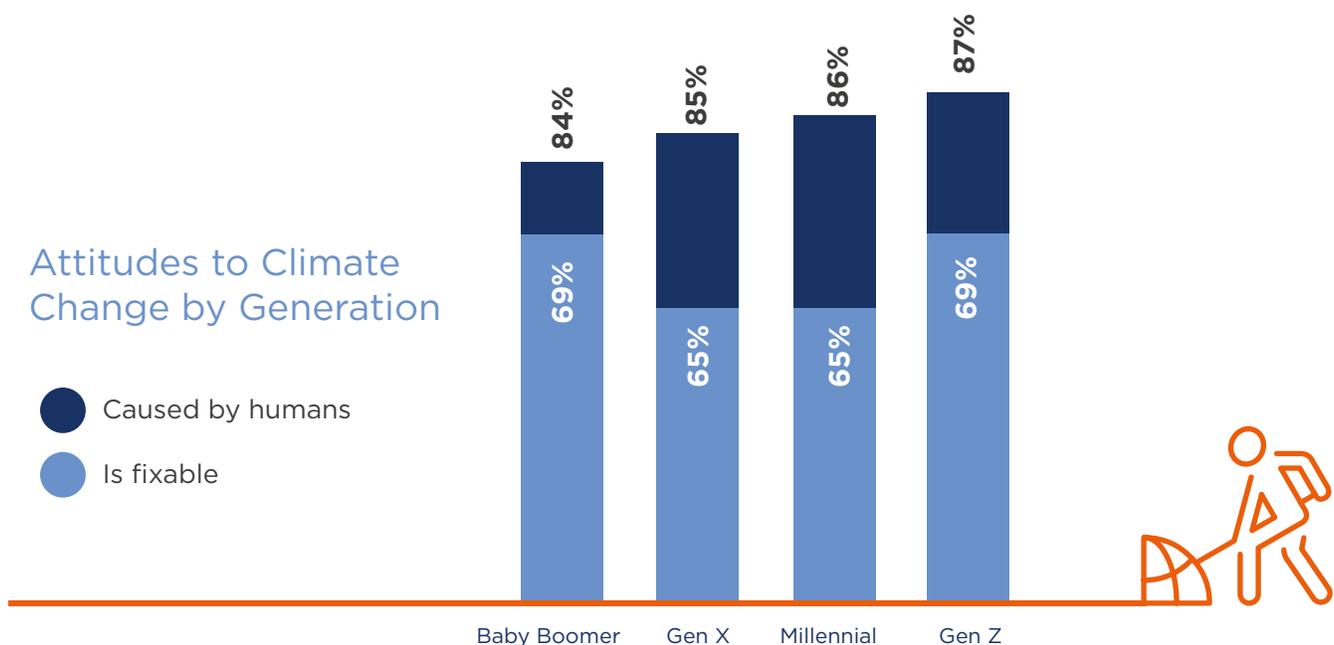
CLIMATE CHANGE

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.

Our 2019 report broadly stated, “Ask 10 people if climate change is happening and at least seven of them will agree it is.” This remains true today, with almost no movement at all at the global level. However, we see quite a bit of movement within countries, showing the complexity of this issue, from disentangling “global warming” from “climate change” and “extreme weather” to confusing the phenomenon with its cause. **China, the US, Australia and the Netherlands all report somewhat fewer people believing climate change to be a reality.** In contrast, numbers have gone up in Canada, Germany and the UK, with only France remaining stable year on year. To shed some light on this we asked Americans whether their opinion had changed over the last year – 16% agreed it had.

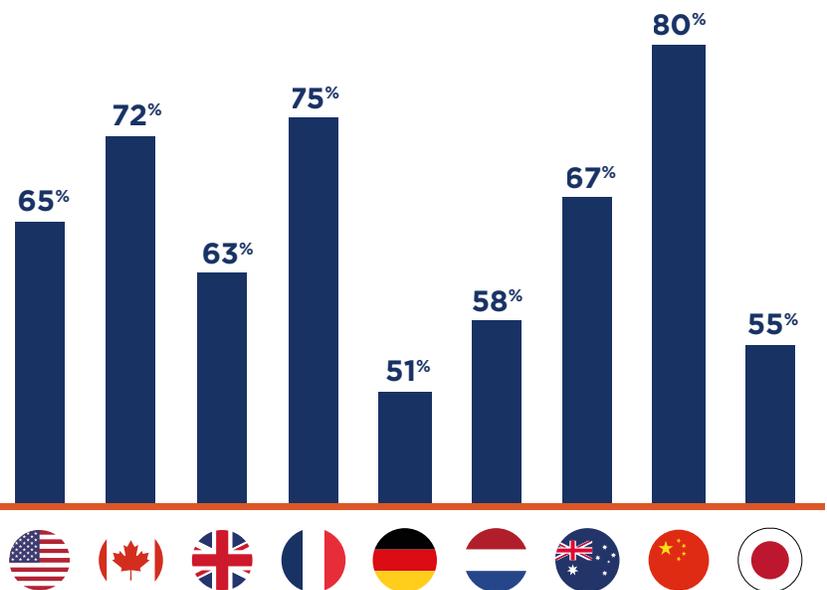
The study uncovered that attitudes do appear to be hardening somewhat on the topic of climate change. In 2019, 44% of those who agreed that climate change was a reality were 100% sure it was; this now stands at 48%. At the other end of the scale, 34% of those who do not think climate change is a reality are 100% sure of that. This overall picture masks considerable variation by country. As noted last year, China and Japan are considerably less likely to be 100% sure at either end of the scale. Given that the overall level of agreement/disagreement is much the same, if not higher than in other countries, this is likely a cultural effect. We observe this hardening of opinion particularly in the US, Canada (up by 24% since 2019), France, Australia (up from 40% to 51%), China and Japan. Interestingly in the UK and the Netherlands, opinion on climate change has softened somewhat while Germany remains consistent.

Our findings generally hold across the generations, with Millennials still being somewhat less sure that climate change is a reality. That notwithstanding, just 13% do not believe that climate change is happening, up slightly in most countries with Canada, the UK, France and Germany being the exception.





Climate Change Is Fixable



While we may recognize that our climate is changing, and adverse, unexpected weather events only serve to reinforce this view, the cause is subject to some debate, along with what could be done about it. It is widely accepted in the scientific community that there is a natural, normal level of climate change that is cyclical in nature. Outside of this normal rate of change, however, is the modern phenomenon of global warming, generally considered by science to be caused by humans. Lay people, however, are convinced that the climate change they are witnessing is caused only by human activity. Eight out of 10 agree on this, irrespective of age or generation.

But what can we do about it? **On average, two-thirds believe that climate change can be reversed by our actions, and this is stable across the two years.** Here we also continue to see serious variation between countries. The Chinese, widely rated as the number one contributor to greenhouse gas emissions, are the most positive that the problem can be fixed by our own actions, with eight out of 10 Chinese saying this. France, site of the drafting and signing of the historic Paris Agreement by 195 countries and international bodies, also scores high, with three-quarters believing we can do something to reverse it, though that is down eight percentage points from 2019. Germany, France's neighbor, remains most pessimistic with just half of the population (51%) thinking it can be fixed. The US, which has confirmed its intent to withdraw from the Paris Agreement, remains unchanged from 2019 to 2020, with two-thirds believing climate change can be reversed by human action.



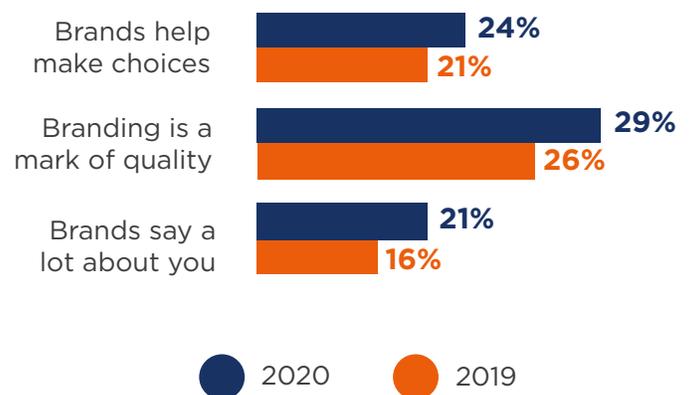
41% of Baby Boomers agreed branding is important in clothing, compared to just **34%** in 2019.

BRANDS

We see some warmer attitudes towards brands than we found in last year's survey. Twenty-one percent of people said "brands say a lot about you," up from 16% in 2019. Twenty-nine percent say "you can tell a lot about the quality of an item from its brand," up from 26%, and 24% say "brands help you make choices in a crowded market," increasing from 21% in 2019. Japan was the one country that did not follow the growing positivity trend towards brands.

Baby Boomers were found to be the most skeptical towards brands as a mark of quality, with just 26% agreeing that is the case, up 5% since 2019. Each succeeding generation exhibits more faith in brands as quality indicators, with a third of Gen Z'ers agreeing brands help them judge quality.

Attitudes to Brands



A striking change in brand attitudes in this year's survey is the increase in the belief by Baby Boomers that branding is important in clothing. This year, 41% agreed clothing brands are important, compared to just 34% in last year's survey. Ratings for the other generations, meanwhile, stayed almost the same year on year. This finding may reflect the increased focus clothing brands have been putting on this generation, a "Greynaissance" as it's been called. "Meet Fashion's Next Generation – The Over 60s," declared The Business of Fashion in April 2018, explaining that "fashion brands are enlisting older models and influencers to entice often ignored Baby Boomers."

This year, once again, branding on items like clothing and mobile phones was more important to younger generations than older generations, with older people more likely to care about branding when it comes to cars. A fifth of Baby Boomers don't think branding is important for any of the categories we asked about (cars, clothes, pre-made meals, soft drinks, alcohol, basic foods, mobile phones, computers and tablets), compared to only 10% of Gen Z saying branding isn't important in any of these categories.

When we asked people what they think is the most believable source of information about new 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 after 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 thought consumer reviews were more believable than independent websites. This year's results close the gap between those two options to just one percentage point.

Coincidentally, the Wall Street Journal published an article on the same topic while we were fielding our survey, asking, "Have Online Reviews Lost All Value?" The story goes on to report that "the internet is so saturated with 5-Star praise—some genuine, much paid for—that it's difficult to know which sites you can trust." While trust in consumer reviews may be eroding, trust in friends, family and reviews still far outpace advertising with or without celebrities, and salespeople.



THE STATE *of Trust*



PRIVACY AND TRUST

Issues around data privacy affect us all, to varying degrees. We are all, increasingly, warned about the dangers of identity theft while at the same time, data is the very thing that every corporation wants to collect and use to gain competitive advantage.

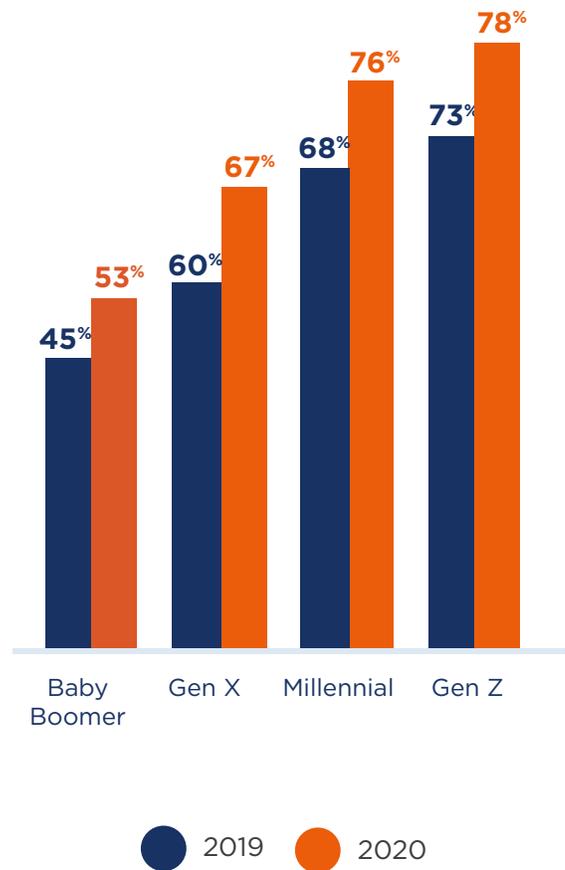
Almost all of us regularly share some personal information (name, address, age, etc.) when buying items online or in a store, when downloading an app, or conducting business via phone. Across the nine countries in the report, very few consumers report never being asked to provide personal information to websites.

One solution to data privacy concerns is to provide false information, particularly if that information is deemed not necessary for the provision of the goods or service.

Among those who are asked to provide such information, the majority report that they do provide false information at least some of the time. Only four in 10 said they never do this in the 2019 report, and this has dropped to 33% in the current year. Most people do so either rarely (three in 10 saying this) or just “sometimes” (also three in 10). The number of people who say they do this often has risen from 3% to 8% in the space of one year. There is some disparity across countries. Countries that are traditionally seen as “hot” on privacy, such as Germany, were previously higher in terms of providing false information. Now most of the inter-country differences have all but evaporated.

Companies will have to act to overcome consumers' resistance to providing accurate information. To do so, providing transparency and choice is critical. Presented with a list of things companies could do, just under a half of people in both years (48% and 46%) asked for an easier way to choose what to share or not share, with the same number (47% and 51%) asking for an opt-out-of-sharing feature. This does not necessarily mean that personal information will never be given; rather, it is an indication that perhaps a trust relationship needs to be built. And the first step towards a building a trust relationship must be transparency as to how the information will be used. Just under a half of all participants selected this option in 2019; in 2020, it is a little over a half. Both elements of this proposed solution were equally endorsed by all generations, with little significant variation across countries.

Will Provide False Information: At Least Sometimes



What is clear from the data is that the notion of a “value exchange” has less traction than a trust relationship. In 2019, just over one in four (27%) said that they would feel more comfortable if “valuable benefits” were offered in exchange. This has risen in 2020 to 34%. The 2019 reaction to this was noticeably higher in both France and Germany (35% and 33% respectively) but has fallen away in Germany (24% in 2020). China continues to lead the way on this (35% in 2019, 42% in 2020).

It is possible to get consumers to positively react to examples of valuable benefit or other offers of compensation for their data. For example, 60% of those surveyed in 2019 said they would like to receive discounts and other perks as compensation in exchange for their data. However, the strength of opinion about the entire issue of data privacy calls into question the veracity of this data. They may simply not have fully understood the implication of what was being asked and reacted only to the attractive offer. It is interesting, however, that the reaction to this has fallen to 48% this year.

When we ask direct questions about companies and data sharing the response is clear. Eight out of 10 strongly or somewhat agreed 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. Yet the battle for data is still not lost; almost three-quarters agree that they would be willing to share their data if there is “a clear benefit for me.” This is a subject covered in greater detail in “The Attention Economy” section in this report.

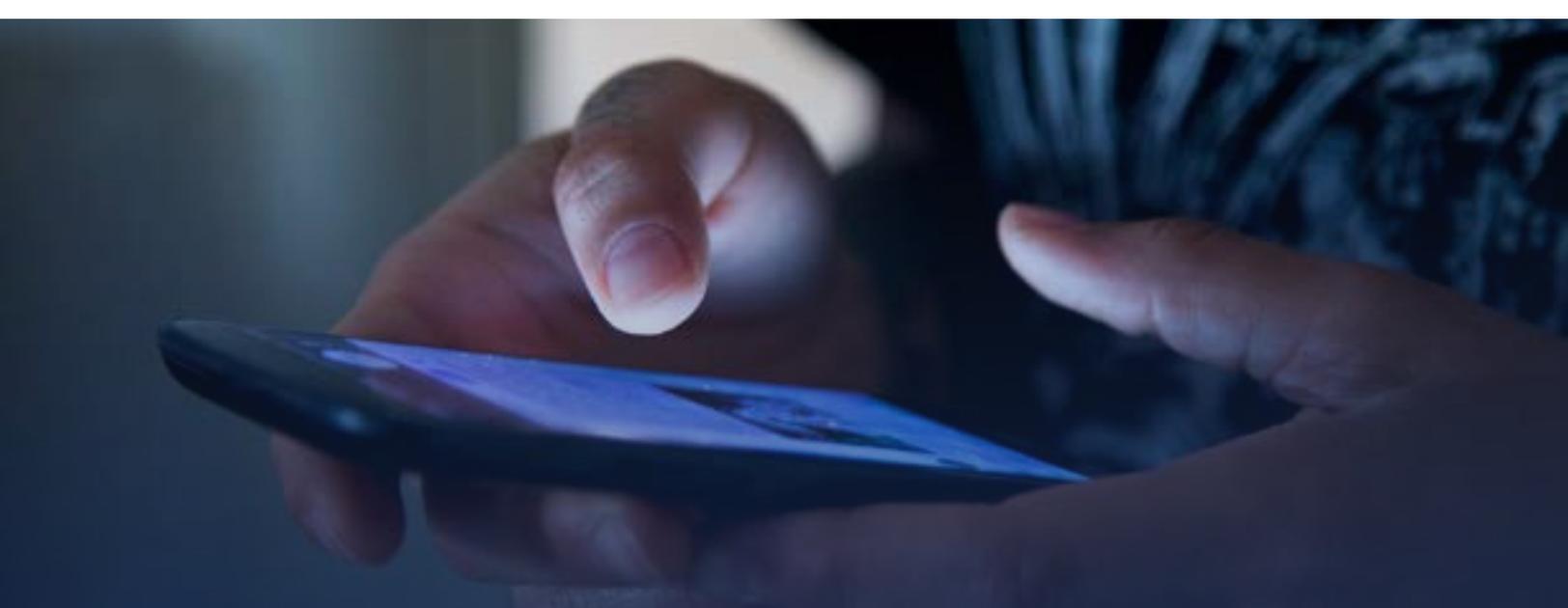
**Seven out
of 10 agree**



**with the notion that companies
have been dishonest about how
personal data is being used.**

In both years, it’s apparent the key to getting good data from consumers is trust, and the first step to trust is familiarity. So often the request for data is made at the very start of what will (hopefully) become an ongoing and fruitful business relationship. If there is mistrust on one side, then this relationship may never begin.

Our participants reported that they had already taken direct action due to privacy concerns, and this could affect businesses. Over the past year, a quarter said they actively avoided websites or left them during a visit because of privacy concerns. The same number took similar action on their phone, choosing to delete, or avoid downloading, an app. They have also taken a more robust stance on data protection. A quarter





adjusted their privacy settings on social media, the same number opting not to share their opinions. One in four adjusted privacy settings on their phone and the same number disabled some cookies. All these actions remain consistent with when we first reported on this in 2019. As each of these actions are taken, trust continues to erode, and business becomes a bit harder for everyone.

Some types of data requests feel comfortable, while others may give pause. Some pieces of data are certainly easier to collect than others and our survey identifies these. Our willingness to provide it depends, to a large extent, on our familiarity with the company asking for it.

The type of data we choose to give remains consistent year over year, with the “easiest” piece of information to collect being gender. Eight out of 10 participants (80% and 79% in 2019 and 2020, respectively) said they were at least slightly willing to share this with a company they were unfamiliar with.

A similar number (77%) also said they would share their nationality, 76% would be at least slightly willing to share their age (not necessarily their date of birth). Three-quarters would let a company know their marital status. Around seven out of 10 would be willing to share that most basic piece of information – their name – with a company they were unfamiliar with. After this, data items become increasingly difficult to obtain, although slightly easier this year than last: email address (2019 62%/2020 66%), income (46%/52%) current location (51%/53%), home address (57%/48%), phone number (44%/50%) and, to put this into some context (since no one would likely ever ask for this, and hopefully few would give it) a government ID number (27%/34%).

21% would not give their location, even to companies with which they are familiar.



It is worth noting that while these numbers may appear promising, most people who are “at least slightly willing” are, in fact, only “slightly” or “somewhat” willing. In the case of government ID, 69% fall into that category.

Some of these items are necessary for transactions or fulfilment needs (for example, an email address for delivery confirmation, a phone number to contact about the delivery, etc.) and often are requested with those caveats in place. Others are potentially useful for targeting; income for example, and, increasingly in the modern world, current location.

When we ask the same question, but now say it is for a company you are familiar with, all levels of willingness to give increase, though this is not universal. A quarter to a fifth (26% in 2019, 21% in 2020) would not give their location to companies with which they are familiar. A similar number (25% and 24%) would be not at all willing to share their income.

The “easier” data points become very easy: 95% would be at least willing to share age, nationality or gender with a company they were familiar with.

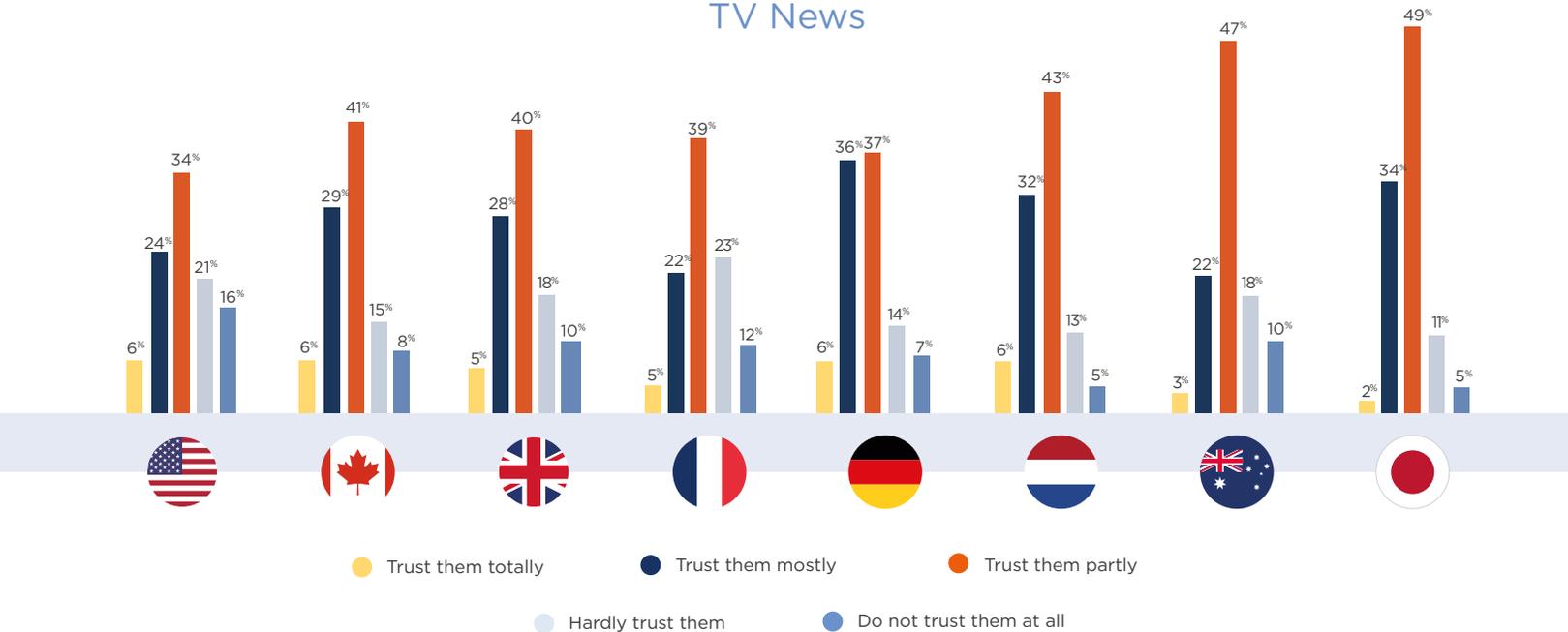
Nothing in the analysis by age cohort suggests that this will get better over time all by itself, as all generations display the same reticence to share. For current location, half are “not at all willing” to share this with an unfamiliar company. Averaged across the two years by generation, it reads as Baby Boomers 52%, Gen X 49%, Millennial 44% and Gen Z 48%. There is a noticeable change when it is a familiar company asking – 22% for Baby Boomers, 23% for Gen X’ers, 24% for Millennials, and 30% for Gen Z’ers.

A great deal of work may be required by corporations to understand how to overcome resistance to sharing these data points. It will start with trust but requires some convincing as to the benefits of sharing – benefits to the consumer that is, not to the company requesting it.

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 commands 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.

Trust What You are Told: TV News





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%. The only country that gets close to this is the UK, and there only for newspapers, with 16% saying they do not trust them at all.

Germany shows higher levels of trust with broadcast media. Four in 10 Germans say they trust TV news, with the same for radio news, either totally or mostly. Australia, for all three media, are the least likely to say they trust them totally or mostly.

Governments are also not universally trusted. This shows great variation across the world, from a mere 6% in Japan to a substantial 20% in the US (22% in France) who say they do not trust what they are told by Government “at all.”

Religious leaders fare worse than government. Across the countries surveyed we observed 14% saying they didn't trust government at all. This doubles to 29% who do not trust religious leaders. This dips below one in five (19%) in only one country, the US.

The medical profession is the most trusted within our set. Only a small minority (3%) do not trust them at all. In almost all countries levels of “trust totally” plus “trust mostly” are in six in 10 or better. **Only in Japan is this not the case; here only 46% told us they trust medical professionals totally or mostly.** Very noticeably it was an unwillingness to say “totally” that drove that finding. A mere 5% of Japanese people said this, compared to an average across all other countries of 17%.

The police are almost as trusted. Just over half (52%) across the world trusting what they say either totally or mostly. Germany and the Netherlands were noticeably high on this, 60% and 57% respectively. Japan again was lowest, at 37%, and again driven by an unwillingness to give them total trust.

20% in the US and 22% in France say they do not trust what they are told by Government “at all.”

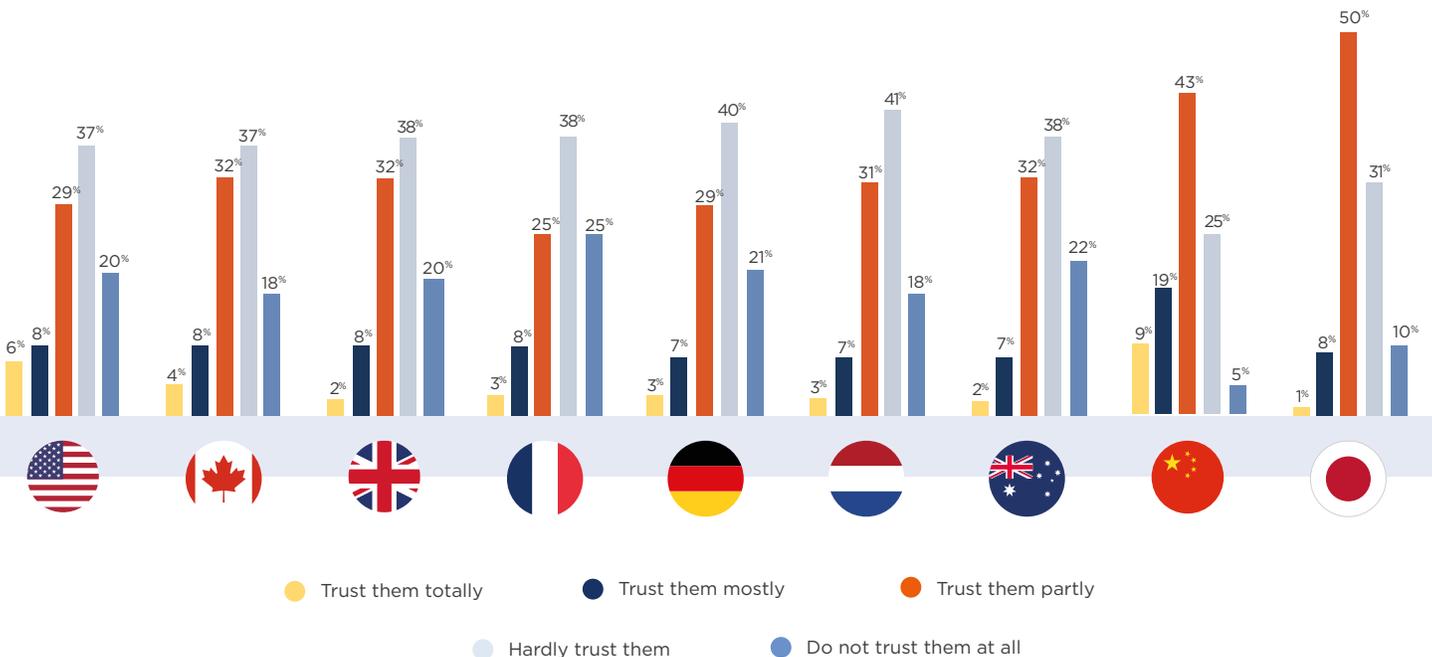
Linking to our topic on climate change we asked about trust in environmental activists, specifically in what they tell us. This was quite polarizing. More people, in almost all countries, said they hardly trusted them (or didn't trust them at all) than said they trusted them totally or mostly. This ranged from +2% in Canada (33% vs 31%) to +23% in Japan (35% vs 12%). The anomaly is China. Here the majority (65%) are trusting and fewer than one in 20 (4%) say they do not trust environmental activists.

This was the one group that split the generations. Fully four out of 10 Baby Boomers hardly trust or do not trust at all what environmental activists tell them, with only one in five saying they do trust them, totally or mostly. Among Gen Z and Millennials, the position is reversed, with more trusting than not trusting.

Two commercial groups were included, and neither fared well. The automotive industry is almost universally viewed in the negative, with more people saying they "hardly trust" them or trust them "not at all" than saying they trust them totally or mostly. At worst we found 48% of Germans hardly or not trusting them at all. In Germany a class action suit against Volkswagen had recently been launched over the 2015 diesel emissions scandal.

As the bottom of our set for trust were advertising agencies. In all countries more people said they trusted advertising agencies "hardly" or "not at all" than said they trusted them "totally" or "mostly," even in China. In fact, other than in China and Japan, most of the population hardly trusts or doesn't trust advertising agencies at all.

Trust What You are Told: Advertising Agencies



THE ATTENTION ECONOMY

Herbert Simon, the renowned American economist, political scientist and cognitive psychologist, first articulated the idea that one's attention could have worth and value in an information-rich world that seeks to attract attention. In 1969 however, there was no real mechanism for truly capturing attention nor any means to exploit that attention at an individual level.

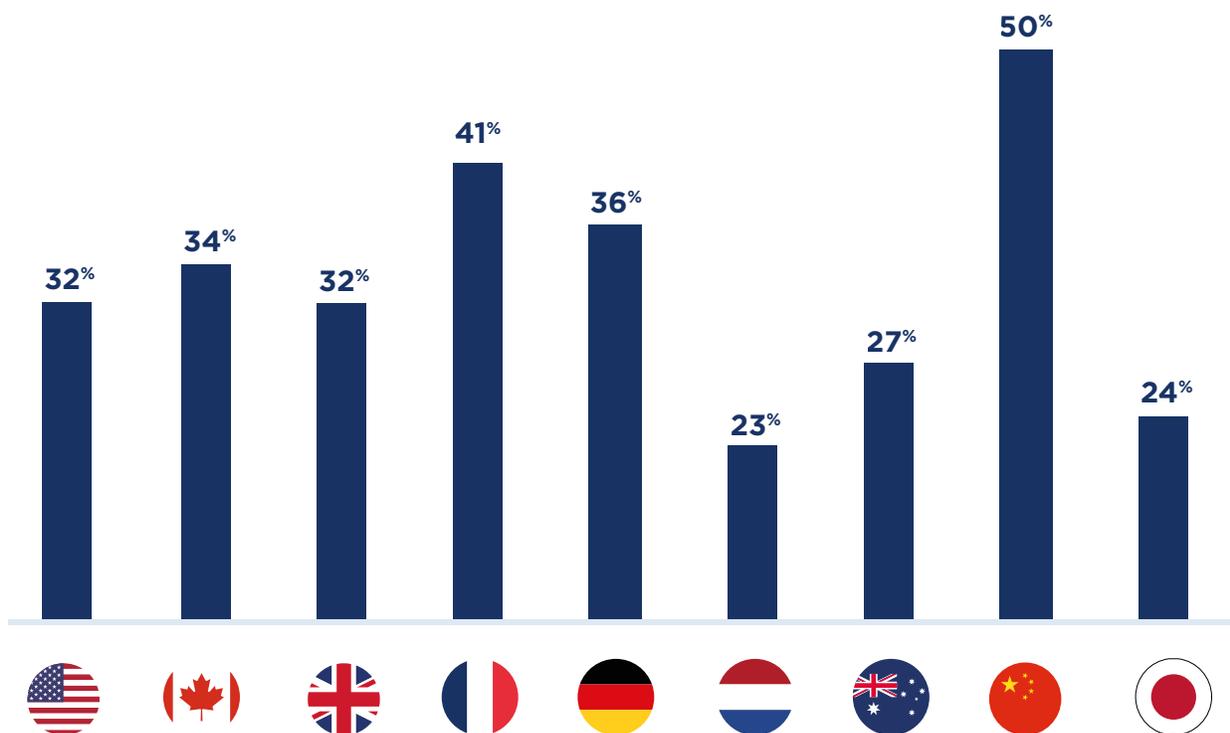
Today, the ubiquity of connected, "always-on" devices in the hands of consumers gives businesses a new competitive venue to reach consumers, grabbing their share of attention through the websites and apps we visit, making it the "holy grail" for advertisers. This economy manifests itself in the recommendations and ads served to consumers on their devices, generated by the data captured from the "clicks" that drive every site visit, online purchase and other activity. This phenomenon is known as the "attention economy" - but unlike most other economic models (for example, "an honest day's pay for an honest day's work"), the use of this by brands does not come with an explicit payback or reward for consumers, other than more purchase recommendations or the occasional coupon. Mechanisms for capturing and storing attention data, and therefore the ability to monetize or otherwise control it at a personal level, are starting to emerge. With this as background we have, for the first time, included questions about the attention economy in our Trends Report.

When asked for their reaction to the idea of monetizing or having control over their attention data, 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 generations 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.



Across countries we generally found the same, around one-third being interested. The Chinese and French were most interested in having control over their attention data at 50% and 41%, respectively. The Dutch and Japanese were least interested at only 23% and 24%, respectively.

Interested in Selling Personal Data: Extremely/Very



Compensation for that data seems to trump control, but not by much. When asked which aspect of monetizing attention appealed – the ability to make some money or control over who had access to it, or both – about eight out of 10 said money; two-thirds said control. As with the overall interest levels, this was consistent across countries, but differed somewhat by generation, at least in terms of control if not money. Three out of four Baby Boomers liked the control aspect, compared to 56% of Gen Z’ers. Gen X’ers and Millennials were at 66% and 61%, respectively.

Up to this point no mention had been made of the amount of money that might be made. We then introduced some arbitrary amounts of money to see its effect on the interest level. The amounts presented (in US dollars) were \$1,000 per annum (or the purchasing power equivalent in local currency), \$250 and \$50.

At the highest amount, interest in compensation remains the same as it had without mentioning money, 33%. This distributed across generations in the same way as overall interest, and mirrored the patterns seen by country.

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Reducing the amount to \$250 almost halved the interest level to 17% overall. The French interest score dropped from 41% to 20% while the Chinese maintained a slightly higher than average level of interest at 29%.

Further reducing the amount to \$50, just below one dollar a week, all but evaporated any interest, even with the promise of no work needing to be done. At this reward point, only one in 10 were “very” or “extremely” interested.

Companies interested in providing services to consumers to store and resell their attention data might find it a hard sell to consumers on a monetary basis, given the likely value placed on that data point on a cost per use basis. An approach through the control aspect might be more promising.

We put several opinions about the attention economy to our participants and the response was mixed. A third found the notion somewhat fanciful, endorsing the statement that it was “good in theory only.” Unexpectedly this cut across generations. But the concept does have some merit. Only one in 10 agreed that it was a solution to a non-problem. It might not be the full solution however; one-third thought it would not stop the “problem” of companies selling attention data without permission.

One in three were worried about the security of this data and all personal details being held in one place. The most endorsed statement, by four in 10, was “I really want to have control over all this, it’s my data after all.”

A possible unintended consequence of reverting ownership and control of attention data to the consumer is that websites might have to charge for their services, currently funded by the value of attention data. Only one in seven recognized this.

As the attention economy evolves it will be important for businesses to note that one in five feels as though companies have been abusing their data “for too long.”

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MEDIA *Diet*

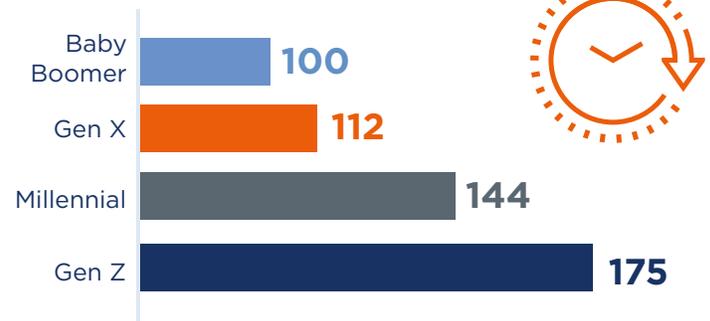
The background of the image is a dark, blue-toned digital cityscape at night. Numerous skyscrapers are visible, with their windows glowing in various colors like yellow, red, and white. Overlaid on this cityscape is a complex network of thin, glowing lines in shades of blue and green, representing data or digital connections. Scattered throughout the scene are numerous small, rectangular images that appear to be floating or flying through the air. These images contain various content, including portraits of people, abstract patterns, and scenes that look like they might be from movies or television shows. The overall aesthetic is futuristic and high-tech, suggesting a theme of digital media consumption or information flow.

The total number of hours spent consuming the various media remains unchanged year over year, but the numbers are quite striking when comparing the youngest generation – Gen Z – to the oldest, the Baby Boomers. In both years, over 75% more time is spent with media by the youngest generations compared to the oldest.

Over 90% of all advertising spend is concentrated in online, television, radio and print. Four-fifths of that expenditure is in online and television. Our data relating to the share of time spent with each media roughly mirrors this.

With the addition of Gen Z, one can observe the beginnings of a generational difference in the share each media type commands, and if this continues, it will have a long-term effect on overall media consumption patterns. In the table below, you can see that TV’s share of the media diet is declining with age, as is print. Radio remains static, with only online showing any growth.

Total Media Hours Indexed to Baby Boomers



Media Diet Shares 2020

	Baby Boomer	Gen X	Millennial	Gen Z
TV	42%	39%	38%	33%
Online	36%	39%	42%	48%
Radio	16%	17%	16%	16%
Print	6%	4%	4%	3%

The differences are small between Baby Boomers and Millennials, which tends to fly in the face of all the evidence we have that younger generations are abandoning TV in droves, but that is dependent on how “TV” is defined in the age of streaming services, on-demand platforms and cord-cutters.

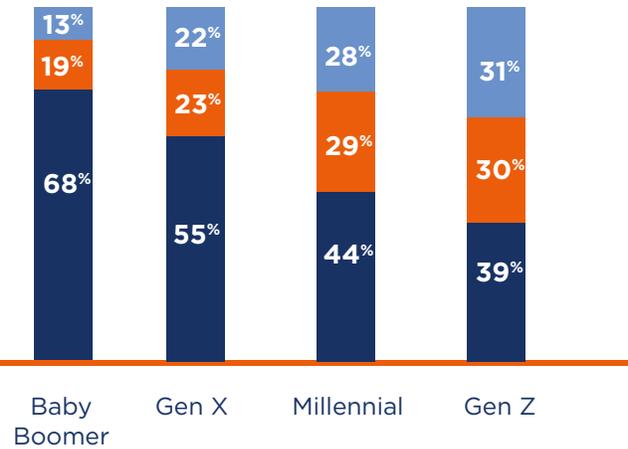
In today’s media environment, TV is no longer a family affair. Baby Boomers and Gen X’ers can remember the days of the family gathered around for “appointment” TV, but not Millennials and certainly not Gen Z. Not only do we have many more channels to watch than we have had before, and more (and bigger and technologically-advanced) TVs than we could have afforded back then, we also have more devices on which it is possible to watch TV content, and more ways in which that content can be consumed. In fact, we have to re-think what it means to “watch TV” at all. Within our definition of TV here we have concentrated on the three areas where ads can be viewed: broadcast (live) TV, on demand services (or catch up TV) and streaming services which are not subscription based, therefore funded by advertising.

When we split it up like this we see a fascinating picture by generation, which indicates where the trends are going.

As can be seen in the table, for each successively younger generation the balance is shifting away from broadcast TV towards on-demand and, most dramatically, streaming services.

Sub-media Shares Within TV

- Streamed TV
- On-Demand TV
- Broadcast TV



At a country level the average share, across both years, for broadcast TV is 53%. Four of the countries (the UK, Germany, the Netherlands, Australia) are within three percentage points of this each year. The lower countries are the US and Canada, who both hover around 48%, and China at 42% and dropping (it was 43% in 2019, 41% this year). In China on-demand TV takes a 30% share, slightly higher than in the US and Canada, where it is just over a quarter. The countries with the highest share of broadcast TV are France, at around 60%, and Japan with a huge 70%. Both countries are on a downward trajectory, however, with broadcast TV's share 3% down in 2020 over 2019 in both countries.

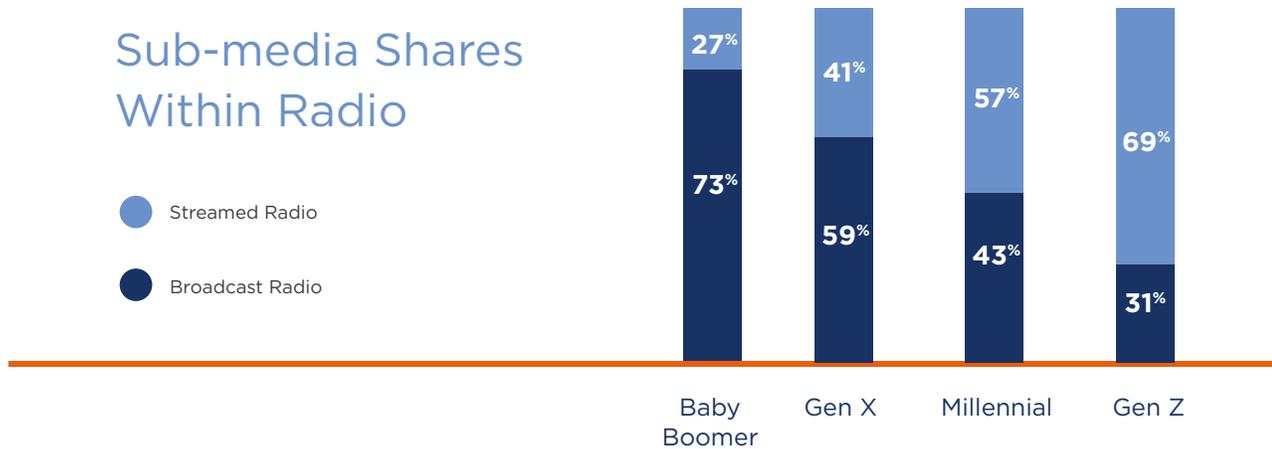
The “winning” medium is the one that offers free choice and convenience and is, increasingly, app-based and therefore unshackled from the TV itself. Given that it is the broadcast TV companies that provide their content on-demand, we should expect a push towards advertising being placed on this sub-channel, as well as efforts to maximize the user experience. As a further reaction we might expect to see the continued decline of static, traditional media such as print publications. In the UK for example, the BBC's “Radio Times” (a radio and TV listings magazine) once had the largest circulation of any magazine in Europe, with average sales of 8.8 million in 1955. By the mid-1970s this had fallen to four million, in 2013 was just over one million, and latest circulation figures hover around 500,000.



We observe a similar overall story to TV in “radio,” if you think of radio as listening to music that you don’t own, that is. The generations listen to roughly the same number of hours of radio, they just listen in a different way. 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 streamed music services such as Spotify and Apple Music.

Sub-media Shares Within Radio

- Streamed Radio
- Broadcast Radio



This generational data is essentially unchanged year over year. The picture at a country level is more volatile. Six out of nine countries show broadcast radio in decline by 2%-4% (down 7% in China), but the US, Canada and the Netherlands all buck the trend.

On the rise within both TV and radio is the sub-media that is adaptable to you, customizable and programmable by an algorithm based on your input. We are no longer passive consumers of media, but active agents in the process, making the future of “broadcast” TV and radio uncertain.

Nowhere is the user more in control than in online media. We noted last year the clear differences by generation in the total amount of hours spent online, and its major contribution to the media hours in total being higher among the younger generation. That pattern repeats in 2020. Gen Z’ers consume over twice as many hours online as Baby Boomers and almost twice as much as Gen X. Each successive generation is consuming more and more online content and spending more and more time in front of a screen. Only time will tell if this is a permanent cultural phenomenon or entirely related to age.

We have split online into three distinct functional areas to match how they are thought of by consumers. Social media, short form video (YouTube by any other name in most countries) and the “rest of the internet.” Generationally, the difference in short form video usage is striking between Millennials, Gen Z, and the other generations. Even more striking is the sheer volume of time spent on social media by Gen Z – twice as much as Baby Boomers and a third as much again as Millennials.

As we said last year, how this plays out in the future will depend to a large degree on the success of YouTube TV (which will be measured in the future under “TV”) and YouTube Music (which will fall under our “radio”). If they are successful, we could see a reduction in overall online hours (as we define it) and increases in the relative proportions for social media and general media, although this will not happen overnight.

CONCLUSION

Understanding the trends is just the first step. Now it's up to us as researchers and marketers to leverage these findings in our own work. Here are some of the ways we have done that.



1. Reality-checking assumptions: The focus on climate change might suggest a simple growing acceptance of its reality, but we find a hardening of attitudes; those believing in it becoming more certain, but those not believing also hardening their position. Likewise, an increase in interest in fashion brands by the over 60s may seem to be an unlikely finding, unless we know that fashion brands are targeting this very group.

2. Using macro trends for context: People's feelings about topics like safety don't necessarily mirror the facts. The safety of one's town or country is an example of this. Although crime rates are at record lows in many countries, our study found that fear persists.

3. Taking a longer perspective: Taken in isolation, a couple of data points may show little movement. It's only when we look back across time that we see inexorable change. Consumers' preference for mobile devices instead of PCs for survey-taking is an example of this. Use of voice activated devices and the transition to streaming as the media consumption mode of choice appear to be steady trends.

4. Recognizing regional differences: Europe is by no means a single block for example; opinions on broad societal issues such as climate change differ considerably by country. Yet there are close similarities across very different societies on many topics – in patterns of media consumption for example.

5. The ownership/usage gap: Just because someone has an item in their home doesn't mean they use it, nor does it mean that they use it as much as they once did – and of course the gap varies by item. Today, it might apply to a new technology device, tomorrow to a car in the garage.

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