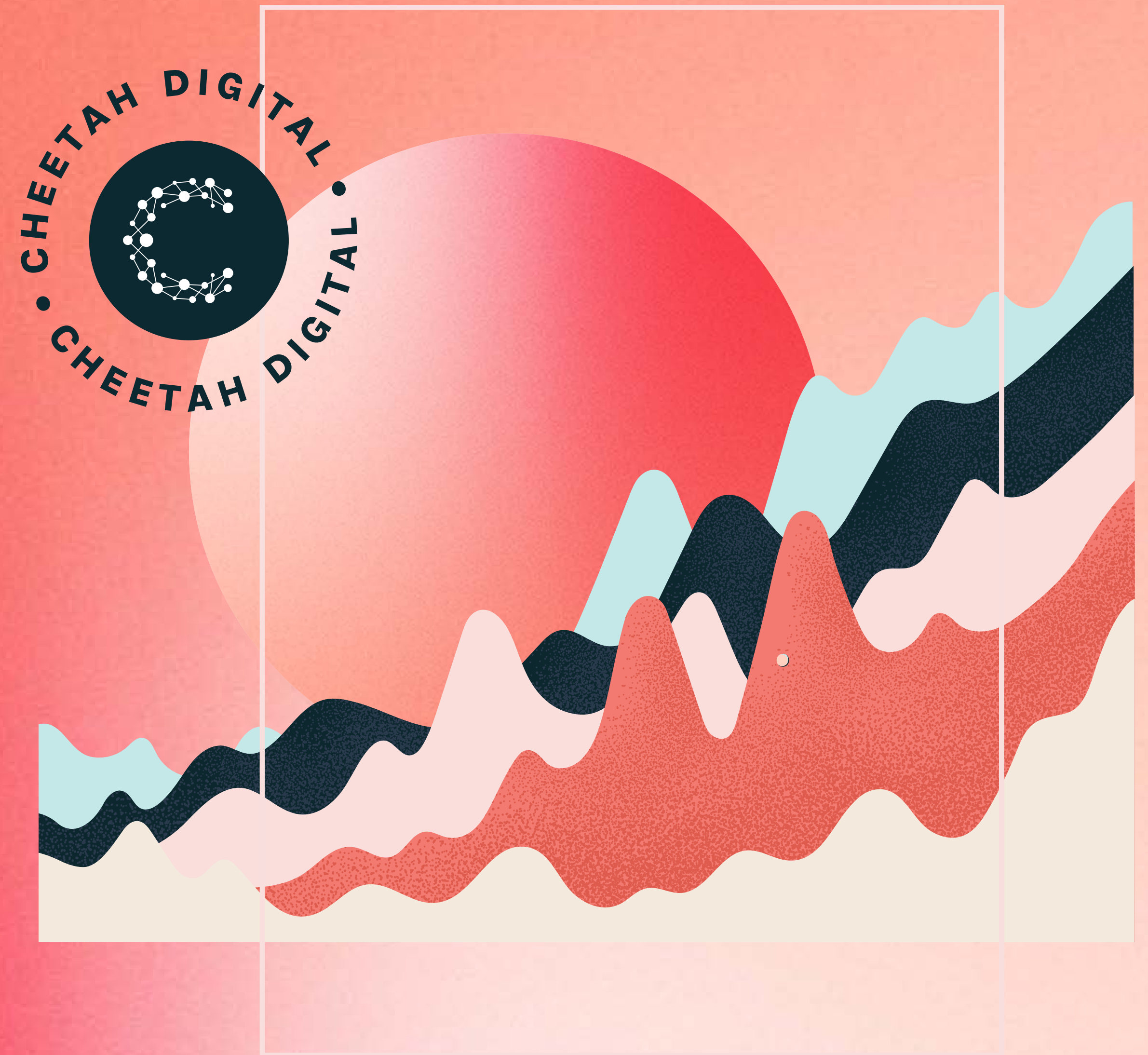# 2022 Digital Consumer Trends Index

Global Consumer Attitudes and Trends in Personalization, Privacy, Messaging, Advertising and Brand Loyalty

In conjuction with ●Econsultancy

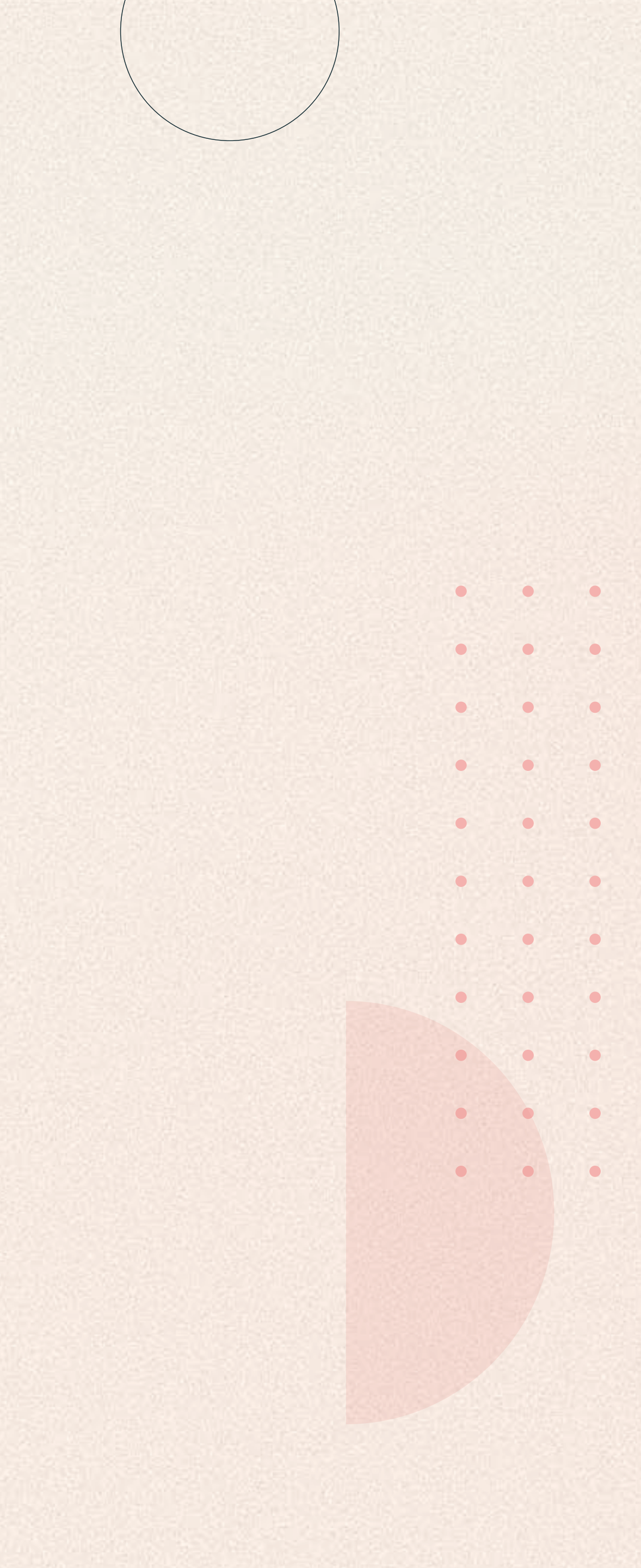CHEETAH DIGITAL · CHEETAH DIGITAL

Executive Summary

For generations the path to purchase was relatively linear, something akin to a train track. Marketers simply had to fill the funnel with a few ads and shuffle consumers straight to the brick-and-mortar cash register. Life was good, creative was the difference maker, and sales steadily grew year-over-year. As eCommerce emerged and digital channels evolved, marketers still seemed to control the game as they leaned hard into marketing and advertising technologies that kept them one step ahead of consumer trends.

Then came the global pandemic of 2020, changing the commerce landscape forever. Consumer behaviors that tended to shift over years now shift in a week, or even just a few days. Demand for some product categories skyrocketed, but nothing like the rise in consumer demand for the amount of channels they want to purchase from. The path to purchase today looks more like a bowl of spaghetti, with technologies providing infinite routes to closing the sale. What used to be a simple game of persuasion, which marketers had nearly mastered, has morphed into the age of consumer empowerment where control, choice and convenience rule the day. Marketers need to pivot energies from trying to persuade, to a model that tries more to support a customer. This means being in every possible marketing channel, while delivering value, and critical product information in real-time, as well as understanding the consumer as an individual rather than lumping her into a segment. Like it or not, this is the "new normal" and the way in which we "internet" has been changed forever.

But fear not. As much as how we market and facilitate value to a consumer has changed, some of the core channels and basic tactics are still resonating. For example, email is still the preferred channel for engagement and driving sales when looking at consumers as a whole. But consumers have been vocal about their expectation of marketers when it comes to personalization, across all available channels. As more technology and data becomes available to brands, consumers feel it is no longer acceptable to simply speak to segments or to make suggestions and recommendations based on data derived from third parties. Resolving these issues should not be difficult for marketers today as the tools and data are readily available to do so... But sometimes bad habits are hard to break.

Additionally, loyalty programs continue to be the preeminent way to build profitable and lasting relationships with consumers. They expect comprehensive programs that go beyond points for purchase and will reward brands that are delivering engaging, interactive experiences. Other successful factors include providing exclusive access to new products, truly-personalized product recommendations, public brand recognition and providing an interactive community component. If there is one clear takeaway, it is that even your own customers will buy from your competitor if you do nothing to engender their loyalty. Adopting a comprehensive loyalty program should be a goal in your greater relationship marketing strategy as it feeds both your customer acquisition and customer retention needs simultaneously.

Privacy is also top of mind with people today. Consumers are taking more steps than ever before to protect their privacy online with a significant rise in ad blocking tech installations, continued increase in the clearing of cookies, encrypting passwords and using paid-for internet security software. Consumers are clearly en-masse pretty cognizant about the value of their data and aim to protect it. When contrasted with well established global privacy legislation, the denouement of Apple's IDFA, and third-party cookie tracking enjoying its final days, modern marketers must now shift to a fully-fledged first- and zero-party data strategy to build direct connections with consumers.

The good news is that the majority of consumers are willing to trade personal and psychographic data if you offer the right value exchange, and especially if you promise to keep that data safe and private. The mechanics of that exchange could be as simple as offering a discount, a reward or a chance to win a prize. But when that transaction is consummated, brands are able to deliver on the expectation of a truly-personalized experience such as

better content, offers and product recommendations. More importantly, in this age of consumer empowerment, marketers can now meet the consumer where they are, in any channel, in near real-time, including in-store. The value exchange economy is roaring to life and it's fueled with first- and zero-party data.

The data you are about to read in this report has the ability to significantly impact your revenue goals in both the short and long term, but it may require a willingness to adopt a new marketing mentality. Relationship marketing requires listening to the right consumer signals intently and activating them in real-time in any channel a consumer prefers. This is an extraordinary opportunity to assess your organization's ability to execute on that level and deliver against consumers' growing demand for more personalization, more privacy and a deeper relationship with the brands they know and trust.

Key Takeaways
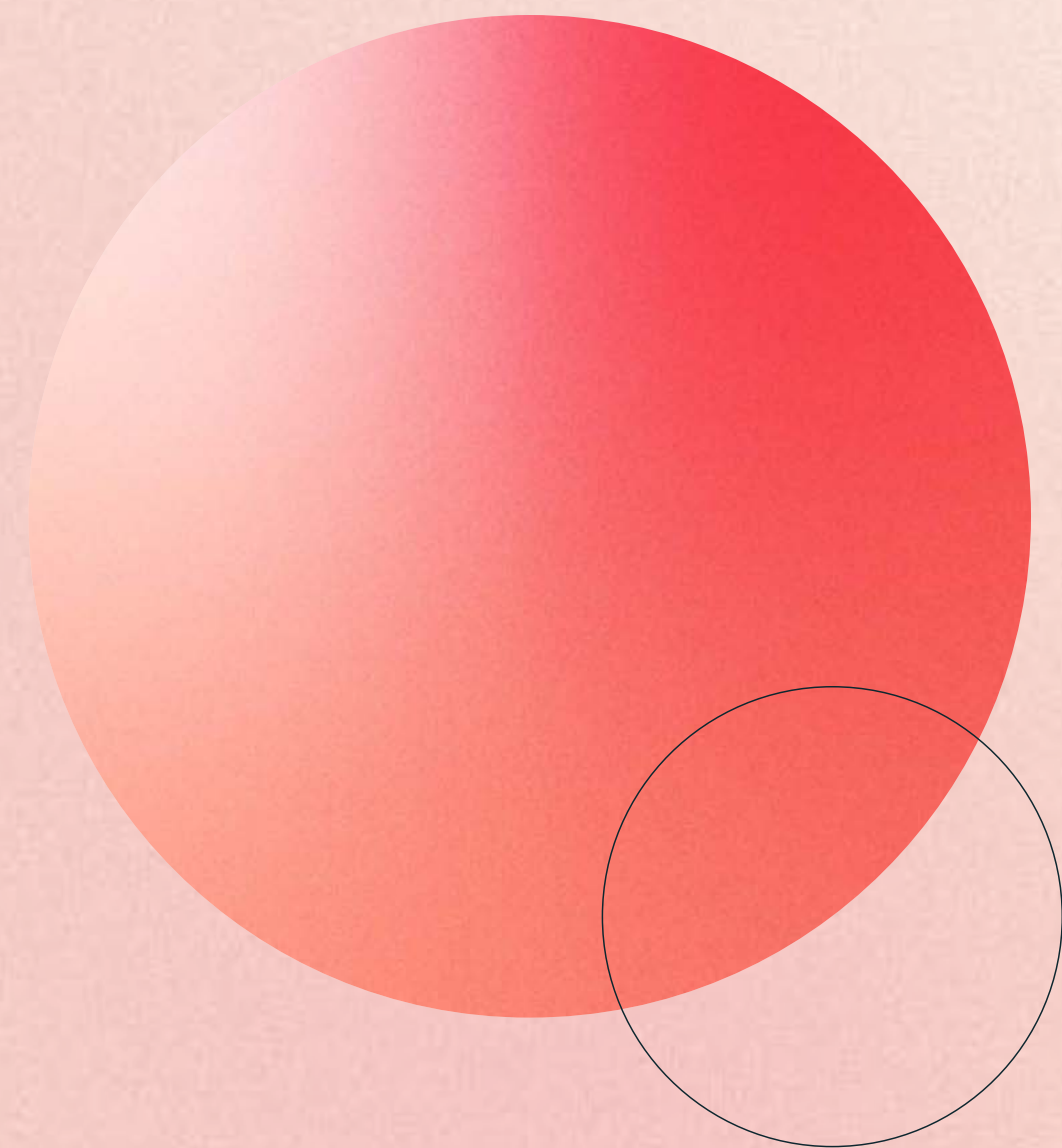
When it comes to driving sales, email has always been one of the most effective channels, especially considering its ability for the hyper-personalization of content and offers. In fact, email still beats banner ads, social media ads, organic posts, and SMS by up to 108%, with half of consumers reporting they have purchased a product directly as a result of an email they received in the last 12 months.

Consumers are loyal by nature, but what they expect from the loyalty programs that turn them from one-off customers into loyal brand advocates is maturing. We have seen a stark rise in consumers expecting contests and sweepstakes (73% increase), exclusive access and content (58% increase), personalized product recommendations (56% increase), brand recognition (45% increase) and community (33% increase).

As ever, brand loyalty is on the rise, with 57% of consumers prepared to pay more to purchase from a preferred brand. This is backed-up by huge increases in the number of consumers who are loyal to a brand because they understand them as an individual (110% increase), treat their data with respect (71% increase), align with their personal values (58% increase) and admire their loyalty program (55% increase).
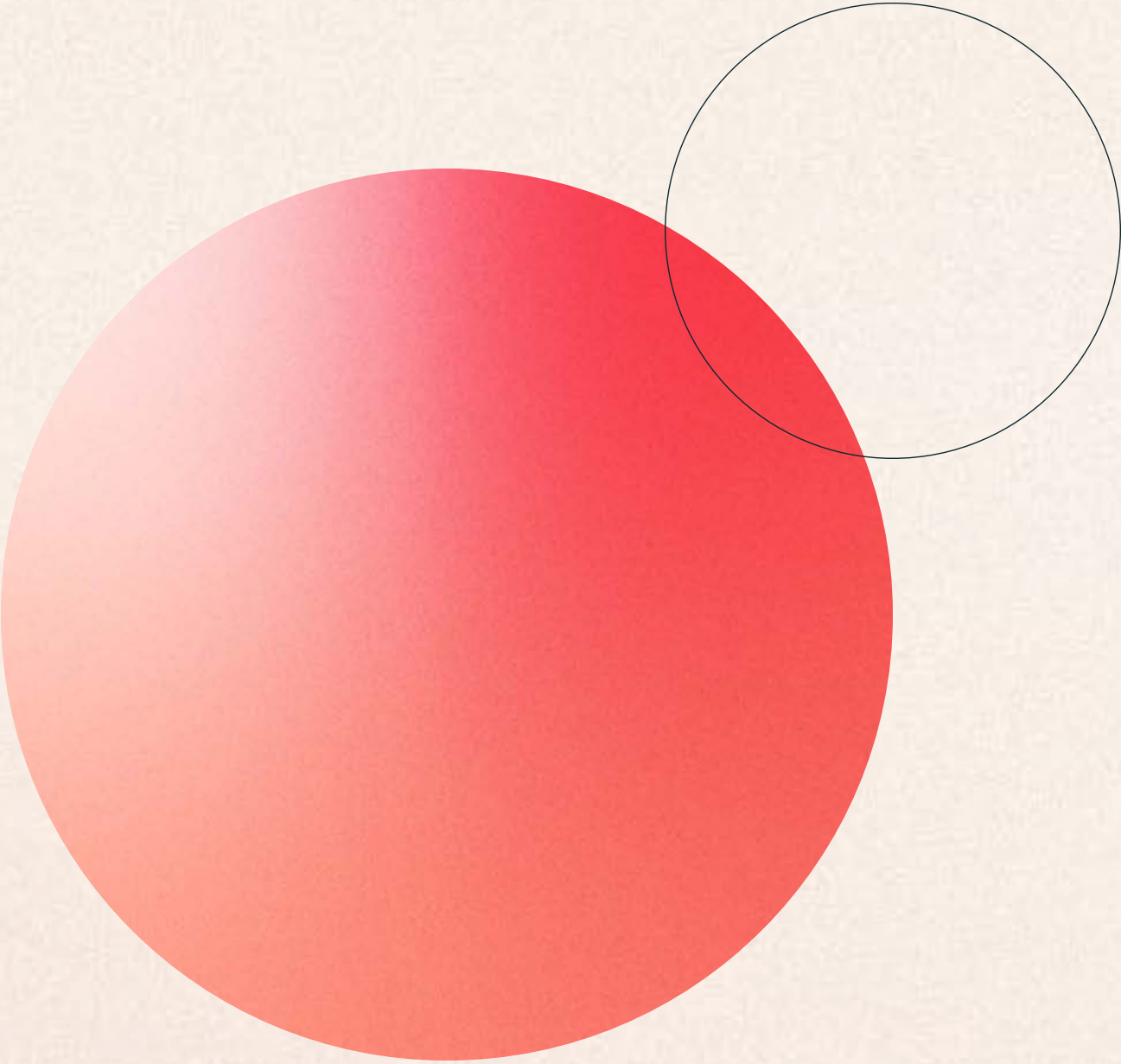
The majority of consumers want to receive personalized content and offers from trusted brands and will readily share personal data for it. However, they prefer brands use data that has been explicitly shared directly to the brand (zero-party data) and they do not feel comfortable with cookie-fueled ads or location tracking — they still see this as a creepy marketing tactic.

As privacy regulations sweep the globe and data breaches continue to dominate news cycles, consumers are more privacy conscious than ever online. We have seen huge rises in the those turning to incognito browsing (50% increase), a PC cleaner (48% increase), password generator (40% increase), ad blocking tech (37% increase), paid for premium software (31% increase) and a password manager (31% increase).

Research Parameters

New global research commissioned by Cheetah Digital reveals what consumers expect from the brands they do business with online, the channels they want to connect on and the data they're prepared to share in return for more personalized experiences at every stage of the customer lifecycle, from acquisition through to loyalty.

It shares insight from 5,404 consumers across seven countries (Australia, France, Japan, Spain, the U.K. and Ireland, and the U.S.) as well as by age group (18-24, 25-39, 40-54, and 55-75), gender and annual household income ($0-$25,000, $25,001-$50,000, $50,001-$75,000, $75,001-$100,000, $100,001-$150,000 and over $150,000) to help digital strategists and decision-makers understand how these issues fit together to build more meaningful and lasting relationships between brand and buyer.

The format for this version of our report focuses mainly on a global view across all demographics. Be sure to visit www.cheetahdigital. com for other report versions that take aim on the differences in attitudes among varying age groups along with a US-only data report (both scheduled for late spring 2022).

Email Is the Number 1 Driver Of Sales... Again

There are numerous touchpoints in which one should be connecting with your customer, but email is still comfortably the prefered channel of consumers for receiving offers, content, incentives, and rewards from brands. Half of consumers (50%) have made a purchase from an email they received in the last 12 months, a 9% uplift on last year.

If you want to get your emails opened, read, clicked and converted, email personalization needs to go beyond a first name in the subject line, or lumping consumers into large cohorts based on tired buyer personas. True email personalization offers products your customer has expressed an interest in, that fit their declared budget, and contain dynamic content that uses keywords that you know will elicit engagement from them — derived from preference insights and purchase motivations that they have explicitly told you. This zero-party data will empower you to deliver hyper-personalized, data-driven email, and maximize ROI from it.

Using zero-party data, you can truly personalize every single touchpoint across owned channels to enhance the customer's journeys with your brand. This is the path in 2022 to increased revenue and customer retention.

19%

Email outperforms organic social posts and social ads by over 19%

53%

Email outperforms banner ads by 53%

108%

Email outperforms SMS by over 108%

Purchase Persuasion Factors

Consumers are influenced by a multitude of factors when making purchases. Brands need to prioritize their value proposition to be front-and-center when a customer is ready to purchase. 41% of consumers still hunt for the best price when it comes to buying, but others value convenience (17%), fitting their style (26%), and expecting brands to behave responsibly (16%).

Online it's sometimes easy to forget that visitor #4532 is a real, live person with completely unique wants and needs that can't be thrown into a large cohort purely based on something they once bought.

Many initiatives by marketers that purport to be personalization rarely meet the definition, which is "producing something to meet someone's *individual requirements*". Personalization is not achieved through segmentation, cohorts or lookalike audiences. Marketers are commonly serving up remedial efforts such as retargeting ads, using simply a customer's first name or employing a curation algorithm that delivers the all-too-familiar: "people who bought item X also bought item Y." These efforts fail to yield the ROI, engagement and long term excitement from consumers that true, next-gen personalization investments net.

Consumers are craving more individualization from brands and rewarding those that have made that commitment.

41%
of consumers will get the best price — it's all about value for their spending

16%
of consumers want brands to behave responsibly and they vote with their wallet

14%
year-on-year increase in consumers hunting for the best price

Leveraging Mobile For Real-Time Engagement

Real-time engagement is the prerequisite expectation of digitally-savvy consumers who have long demanded next-day shipping, live-tracking of their brunch order, and choosing potential dating partners at the swipe of a finger.

Consumers interact with a brand on multiple channels, oftentimes unpredictably. The way to engage with these consumers is through real-time, hyper-personalized experiences. To cut the buzzwords, that's providing the right offer, on the right channel, at the right time. More than half of consumers (52%) declared they use a mobile phone while in a store to research or help them decide to make a purchase, and a hefty 47% claim to have browsed for products in a physical store but purchased online. It's clear that if you are not listening to these multiple touchpoints across various channels, or if you can't activate that data and provide a relevant and real-time reaction on mobile, your customers will be purchasing elsewhere.

In today's digital and interconnected world, your relationship marketing strategy has to have mobile-first capabilities, rather than merely being mobile-responsive. This cannot be overstated.

Consumers interact with an average of six digital touchpoints when engaging with a brand — whether that's via social media, payment through digital wallet, offers from SMS or email, just to name a few — but all these touchpoints can be directly accessed by consumers through mobile. Mobile is no longer a nice-to-have, it's a must-have.
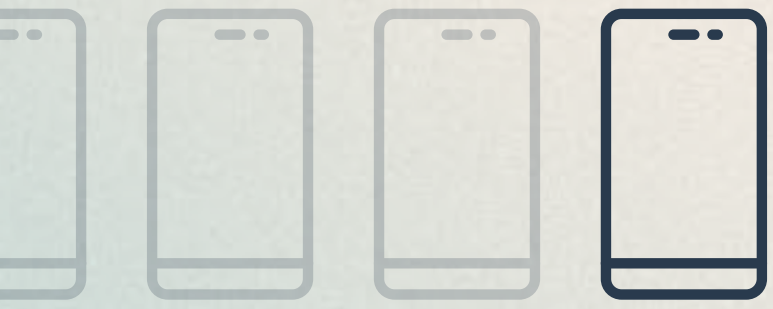
Mobile is no longer a nice-to-have, **it's a must-have.**

52%
of consumers have purchased a product or service in-app
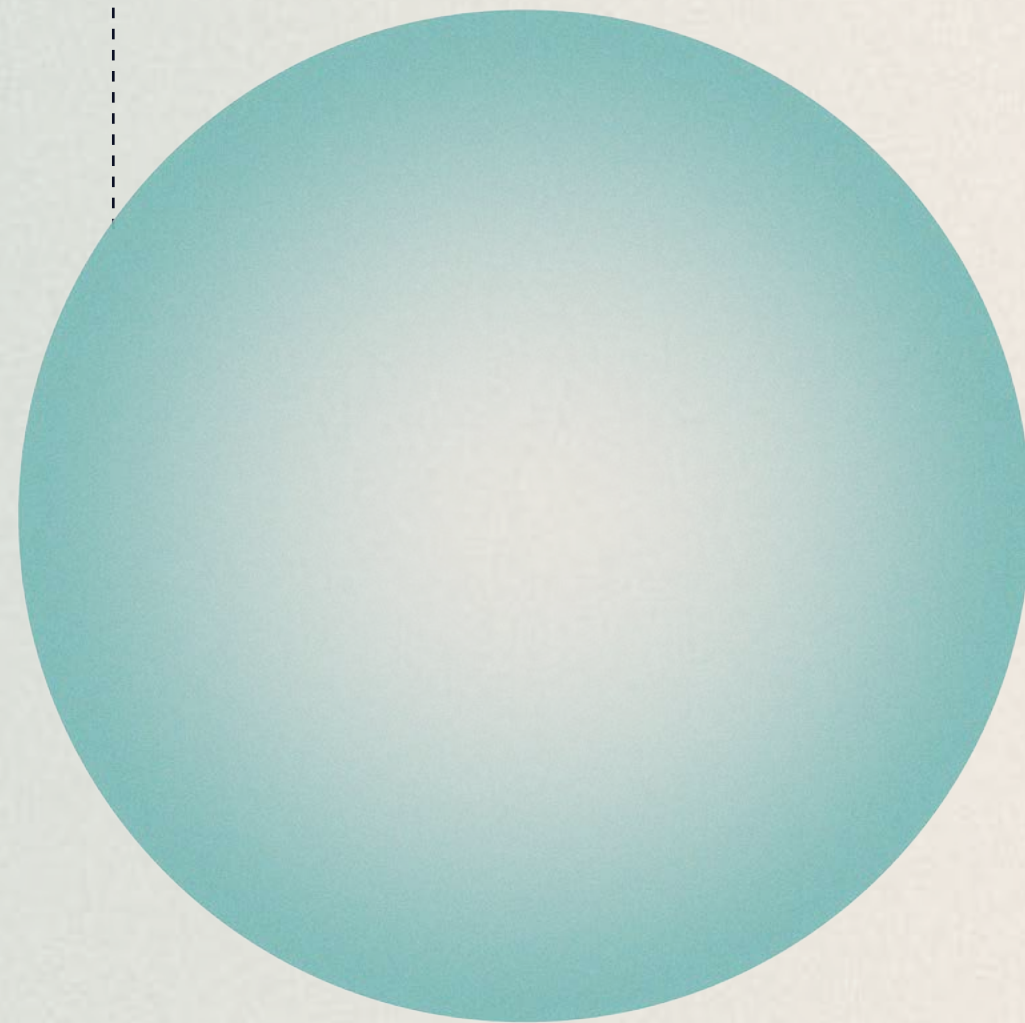
52%
of consumers have used a mobile phone while in a store to research or help decide to make a purchase
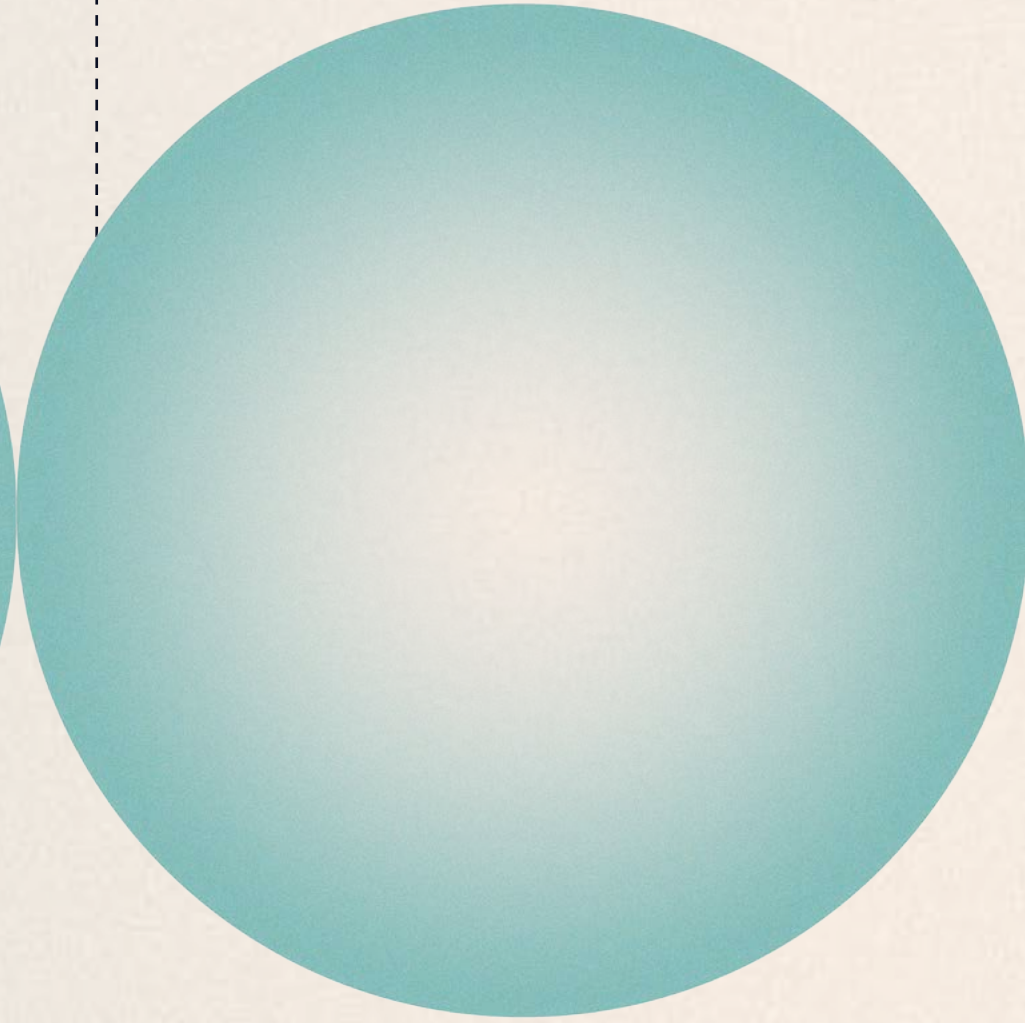
47%
have browsed for products in a physical store but purchased online
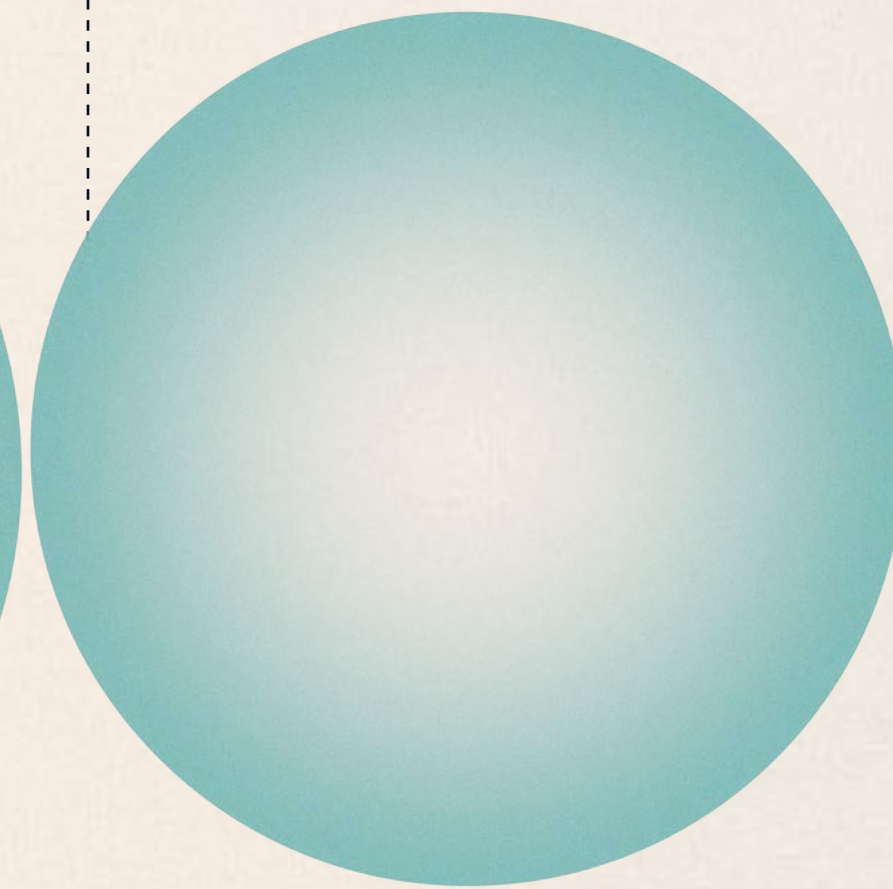
19%
year-on-year increase in consumers who have bought something because of an email they viewed on their mobile phone
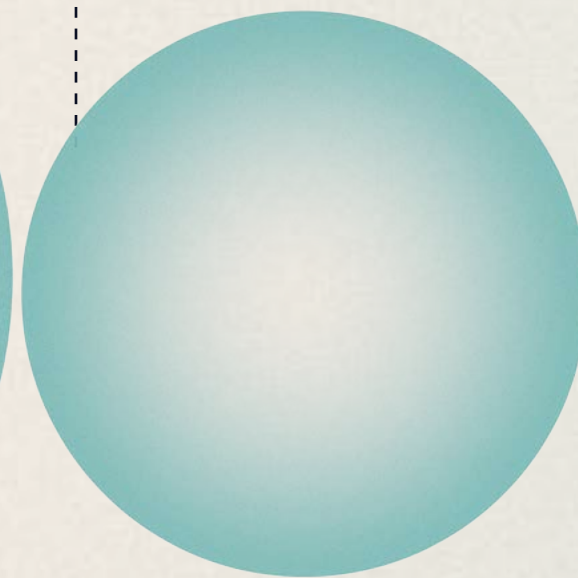
How Best-in-Class Brands are Nurturing Profitable Relationships

The overwhelming majority of consumers, when thinking about how their favorite brand communicates with them, want the relationship to go beyond the purely transactional.

Above all else, a staggering 80% of consumers like consistent shopping experiences, irrespective of the channel. That means marketers need the ability to both listen and react in all channels. More importantly, all of that data must flow in and out of a single source of truth. Simply put, there is a need for a unified customer profile which includes identifying core information about the customer, the channels and interactions they've had with your organization along with their transaction history, be it revenue, an event, or simply visiting your website, for example.

78% of consumers have a favorite brand as it rewards them for their loyalty, and almost 3/4 of consumers like brands to use their data responsibly and treat them as an individual. Where privacy was once an afterthought for most brands, it's now seen as vital a differentiator as price, product, and customer experience.
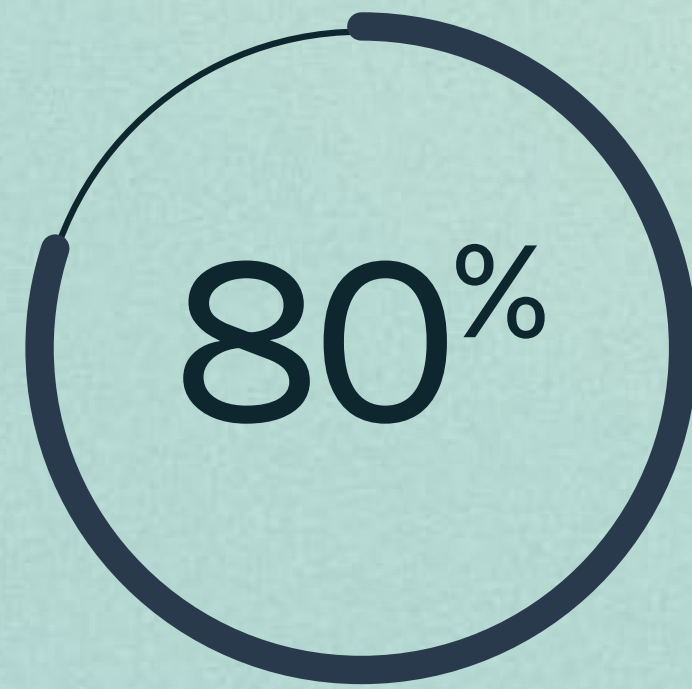
80% of consumers have a favorite brand as it provides a consistent customer experience
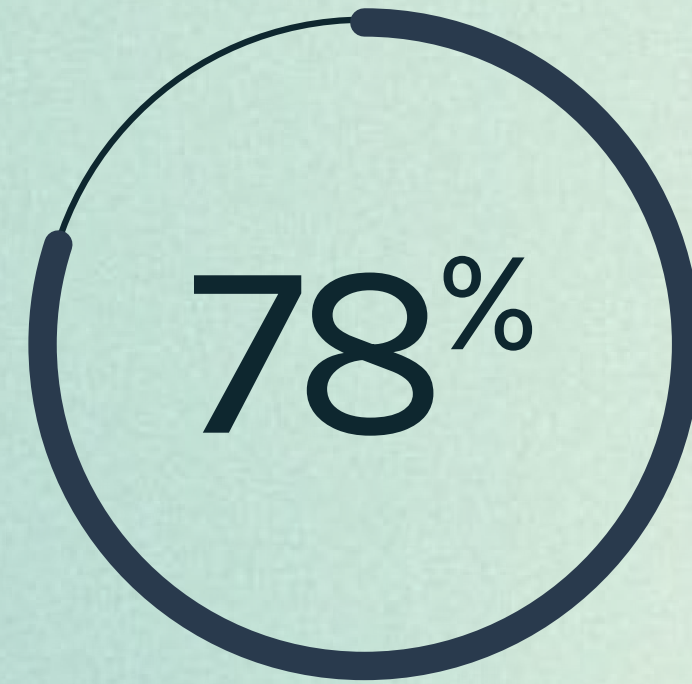
78% of consumers have a favorite brand as it rewards them for their loyalty
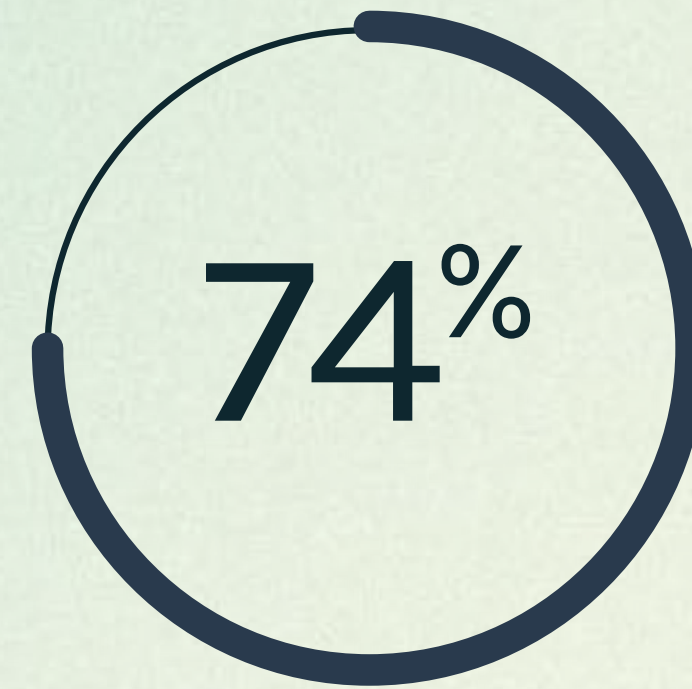
74% of consumers have a favorite brand as it uses their data in a way that makes them feel comfortable
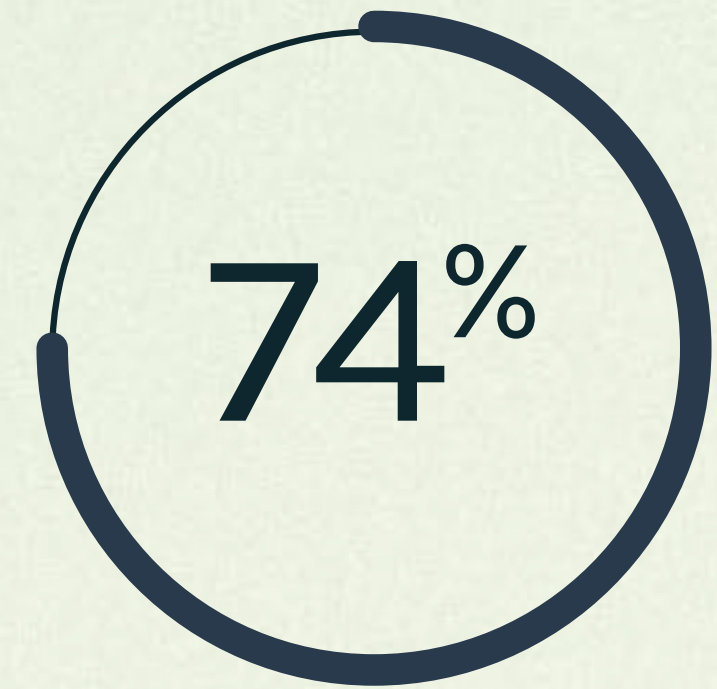
74% of consumers have a favorite brand as it treats them like an individual
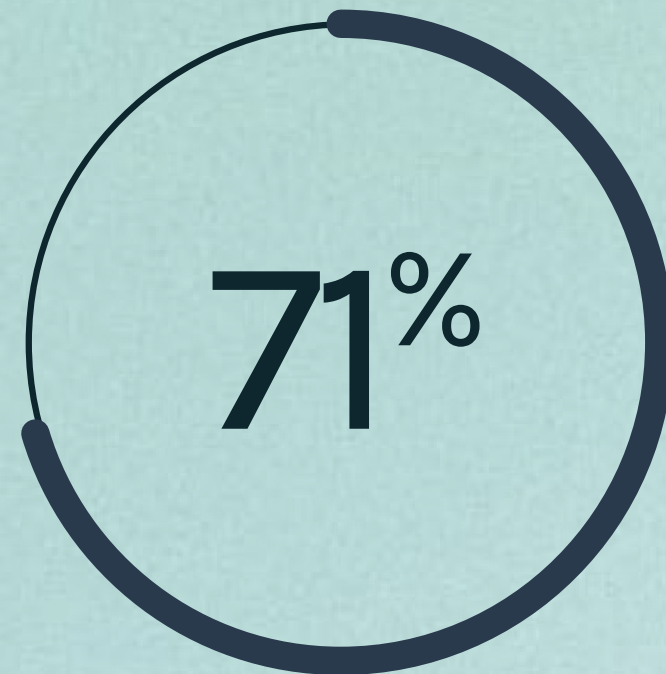
71% of consumers have a favorite brand as it strives to develop a relationship
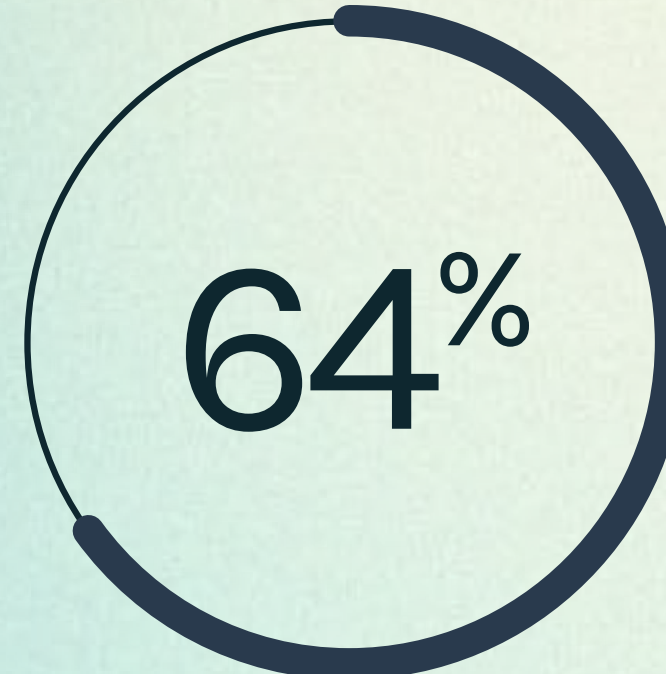
64% of consumers have a favorite brand as it surprises them with rewards they don't expect
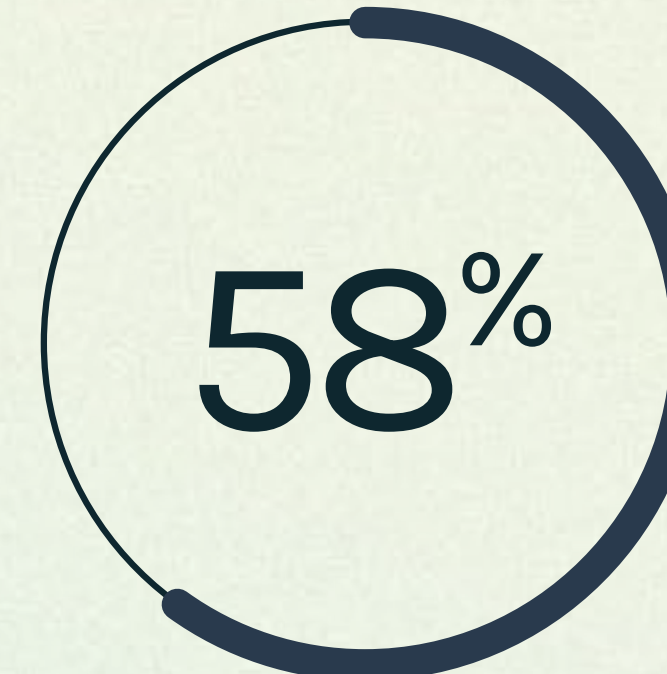
58% of consumers have a favorite brand as it treats them like a VIP

How Favored Brands Communicate with Their Customers

Your communication frequency should be based on your typical customer's purchase cycle and profile. If customers typically make repeat purchases every six months, don't inundate them with targeted emails or advertising right after they've made a purchase. More than half of consumers (51%) describe the relationship with their favorite brand as they communicate as and when necessary — a sweet spot you learn through progressively getting to know your customer.

Progressive profiling allows you to ask the next-best question to expand your knowledge on an individual. New data gives you new reasons to reach out with a more relevant message or offer. 23% of consumers describe the relationship with their favorite brand as one that understands them. Most forward-thinking brands are progressively profiling customers' interests, preferences, motivations and desires just as two people would do in a conversation. With zero-party data, audience building and progressive profiling never stops, it just evolves. Let the data tell you when they have a need or you have a relevant message to send. The days of marketers casting and blasting one single message to their entire database are behind us. Know your audience and let AI or machine learning help determine who gets that next message and when.

51%
of consumers describe the relationship with their favorite brand as they communicate as and when necessary

23%
of consumers describe the relationship with their favorite brand as they understand them

Personalization Initiatives are Falling Short

Most marketers kind of suck at personalization. That might sound like clickbait, but in the data economy, where brands and retailers have huge portfolios of data on their customers, personalization is more often a marketing department buzzword than a genuine tactic.

Consumers are frustrated with the lack of personalized messaging they are receiving, with half of them feeling irked by irrelevant content or offers (49%), receiving messages that don't reflect their wants and needs (41%), and almost a third do not feel a brand has even recognized their shopping or loyalty history (31%).

35% of consumers felt frustration when they received messaging based on what seemed to be information about them that hadn't been shared directly with

the brand. Personalization is the core of relationship marketing. That means it's about delivering value, relevancy and creating meaningful experiences to individuals based on their own preferences and data not third-party or inferred data that may have possibly been bought or collected by tracking and snooping.

Your personalization and messaging strategy needs to be rooted in both first- and zero-party data. Creating messaging opportunities based on transactional data is great, but using zero-party and psychographic data to personalize those messages will differentiate your brand from your competitors.
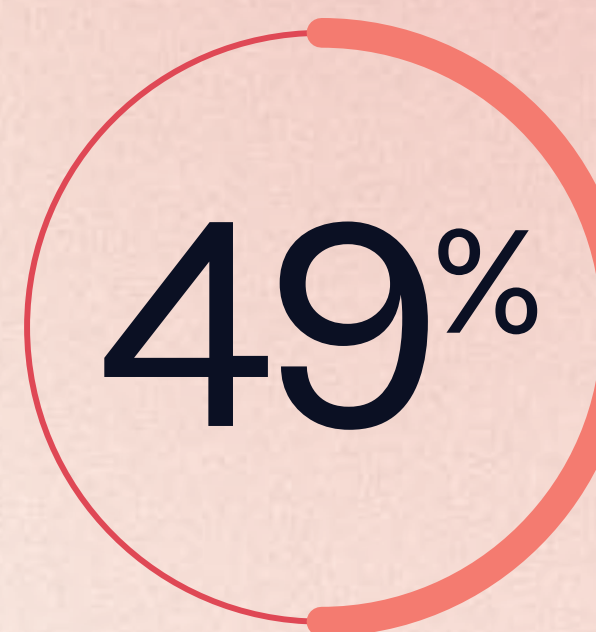
49% of consumers felt frustration when they received irrelevant content or offers
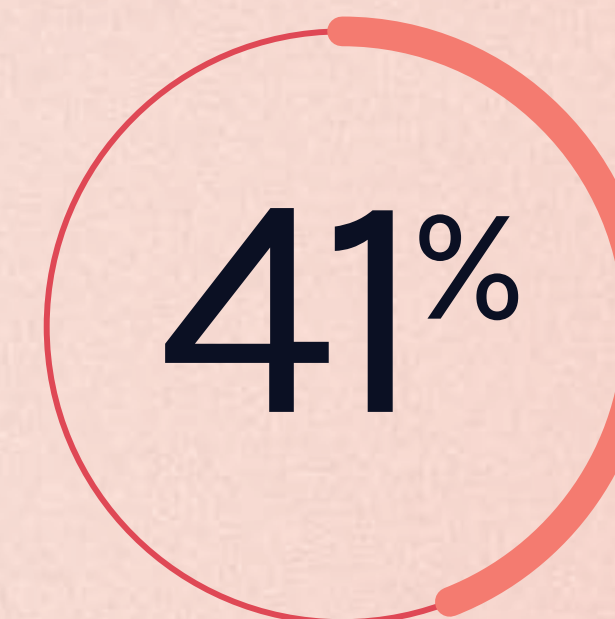
of consumers felt frustration from messaging that doesn't reflect their wants and needs **41%**

35% of consumers felt frustration when they received messaging based on information that they hadn't shared directly with the brand

of consumers felt frustration when they received messaging that didn't recognize their shopping or loyalty history **31%**
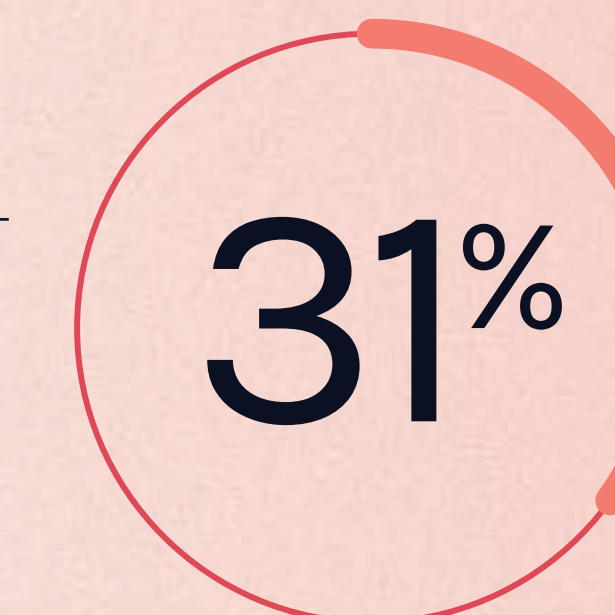
Personalization that Misses the Mark is Becoming All-Too-Familiar

Year-on-year rises in consumer frustations at the personalization they receive from brands.

11%

rise in frustration at messaging that doesn't recognize loyalty history

17%
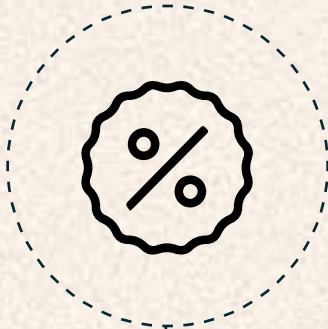
rise in frustration at messaging containing irrelevant content & offers

17%

rise in frustration at messaging based on data the consumer hasn't shared directly with the brand
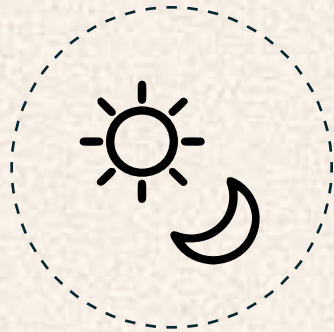
20%

rise in frustration at communications delivered at the wrong time of day

52%

rise in frustration at messaging that doesn't reflect their wants and needs

Consumers are Happy with the Amount of Messaging They Receive from Brands

Whether through email, apps, social media or SMS, consumers are generally pretty content with the volume of messages they receive from brands.

When it comes to being "about right" or "would like to receive more messaging," the numbers are positive. Consumers feel they get the perfect amount of or would readily receive more messaging about discounts (70%), brand value (65%), loyalty programs (71%), VIP offers (68%), treats (73%), free delivery offers (72%), and sales (55%).

When it comes to feeling "overwhelmed" by messaging, the numbers are again encouraging, discounts (11%), brand values (12%), loyalty programs (11%), VIP offers (12%), treats (10%), free delivery offers (10%), and sales (16%).

Those brands that win master the craft of connecting with their customer on the right channel, with the right message, at the right time.

68%
of consumers receive about the right amount or would like more messaging on VIP offers from brands

71%
of consumers receive about the right amount or would like more messaging on loyalty programs from brands

65%
of consumers receive about the right amount or would like more messaging on brand values

Customer-obsessed businesses expect to be 7X more relevant to customers and 4X more profitable
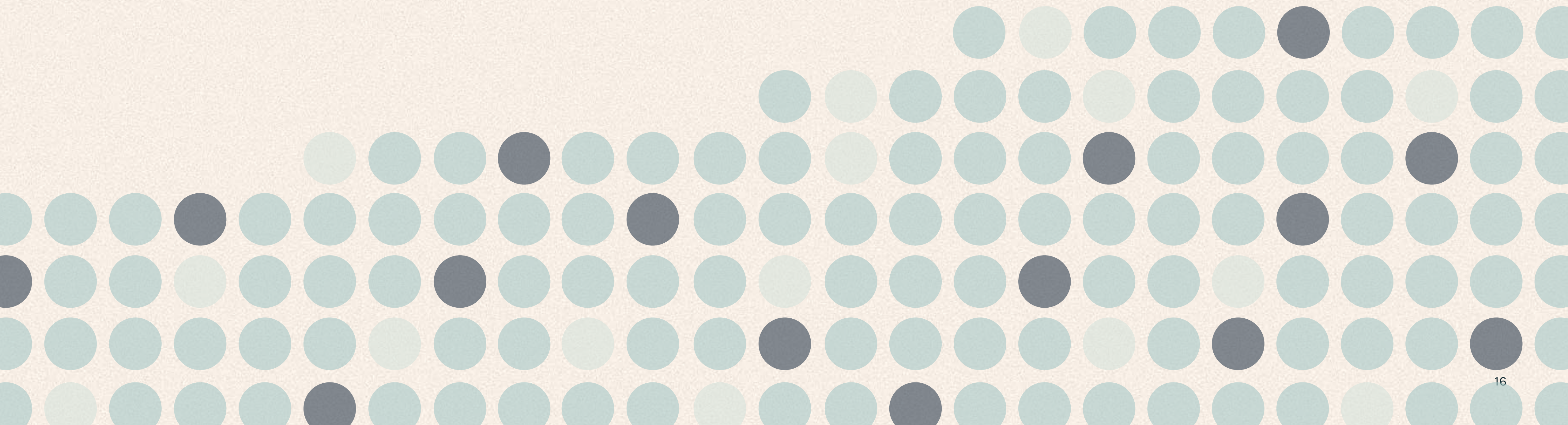
Loyalty Drivers

Once merely the darling of supermarkets and airlines, loyalty programs are omnipresent in every vertical. There are many factors that drive brand loyalty, and the top drivers are fairly simple, have a great product or service (55%) and good customer service (38%). Following on from that, over a third of consumers value a brand's loyalty program (34%), similar for the brand being convenient to use (31%). Investments in improving these areas will ensure a long-term return and differentiate you from your competitors.

Then it becomes a little more interesting. 39% of consumers are electing to stick with brands that they feel it's safe to buy from — this rise in conscientious consumerism, with your customers proactively educating themselves on your brand's corporate, ethical, and environmental values is a burgeoning loyalty driver that feels here to stay.

What's more, 24% of consumers are loyal to brands that are responsible with their data, with modern consumers more up-to-date with privacy legislation and the responsibilities of the brands they do business with.
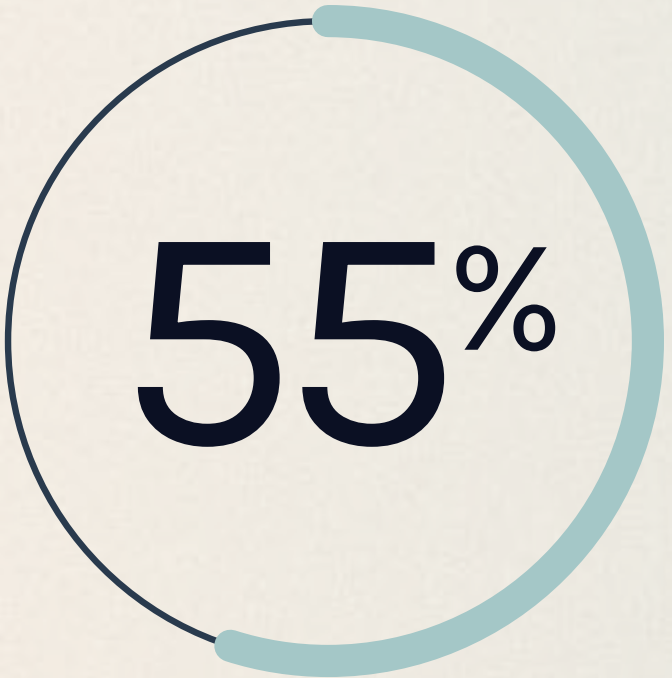
55% — of consumers are loyal to certain brands because they have great products/services
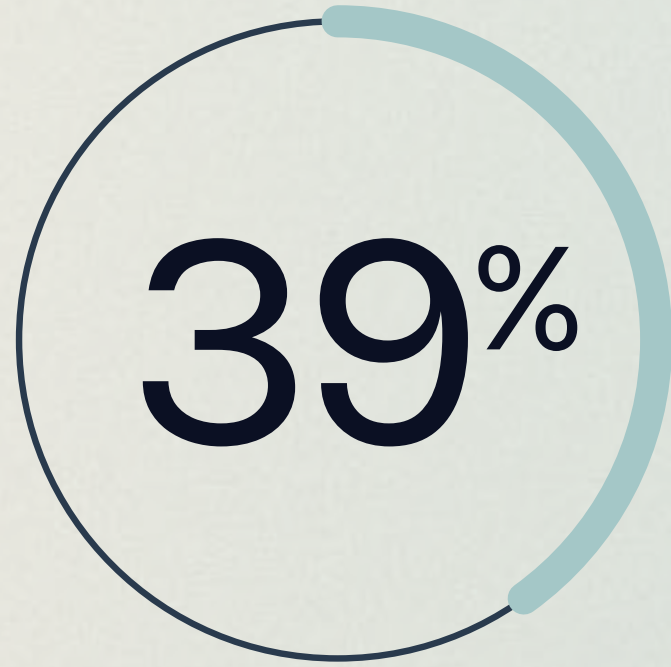
of consumers are loyal to certain brands because they feel safe to buy from — **39%**
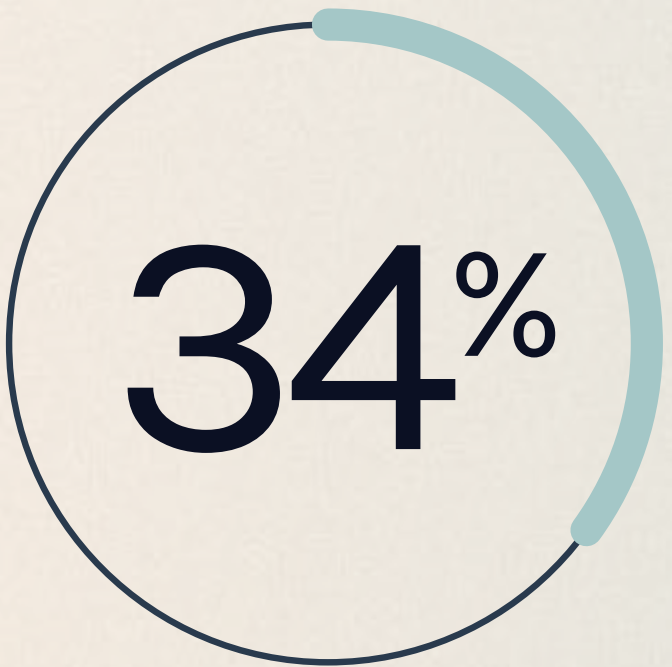
34% — of consumers are loyal to certain brands because they like their loyalty program

of consumers are loyal to certain brands because they trust them to treat their data with respect — **24%**

Highly-Profitable Customers are Being Handed to Your Competitors

Consumers tend to be people of habit, and many enjoy the benefits that come from being loyal to a brand. The most unambiguous way a customer can show they trust your brand is to pick you over the competition, have affinity for your products, and believe in your brand promises, as well as being prepared to pay a little bit extra for it — 57% of consumers identify this way.

However the real story here is that over two-thirds of consumers say there are examples where they frequently buy from the same company, but don't feel loyal to that company, and 78% say they are loyal to a particular brand, but will look elsewhere if it's cheaper or more convenient.

Old patterns of consumer behavior no longer hold true in the current marketplace, and brands need to adjust to survive. Loyalty programs can be that all-important arrow in the CMOs quiver.

57%
of consumers are prepared to pay more to purchase from a trusted brand

67%
of consumers buy frequently from the same company, but are not loyal to that brand

29%
Only 29% of consumers are not loyal to any particular brands
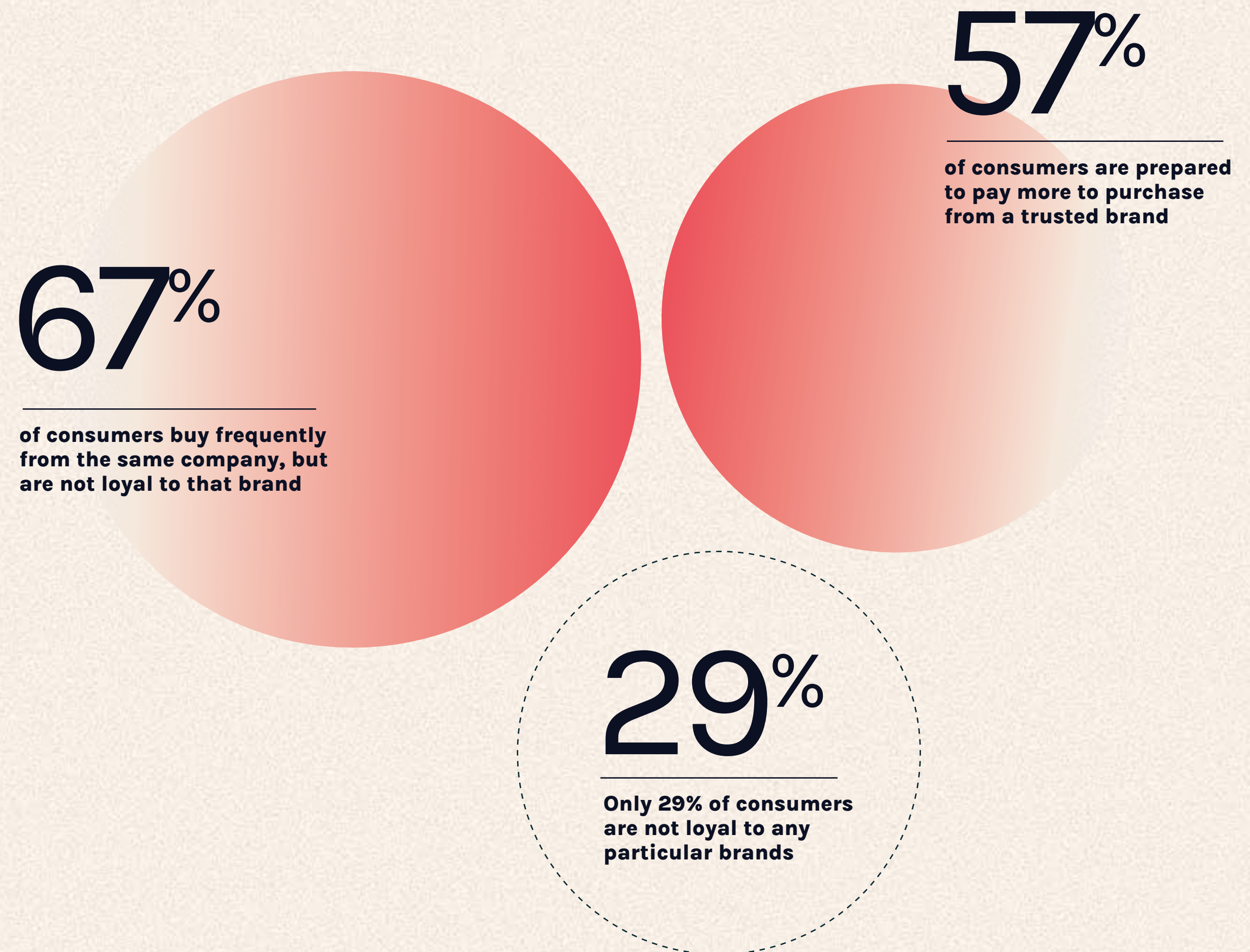
Turning Frequent Shoppers into Loyal Brand Advocates

The core of loyalty is not merely the cheapest price point, but a brand that creates emotive bonds, fosters community, recognizes the customer as an individual, and delivers content, bespoke offers, and product recommendations that reflect this.

Marketing departments are perpetually working to envision new and interesting ways to keep their customers engaged, retained, and loyal in a world full of infinite choices. In this era of the digitally savvy consumer, traditional loyalty program models are becoming outdated — too transactional, too stale, and not effective in significantly changing consumers' perception or behavior.

With over two-thirds of consumers declaring they buy frequently from the same company, but don't feel loyal to that company, we asked what could turn these regular buyers into loyal brand advocates?

Brands that provide extra value for the customer to stay loyal (40%), feeling safe to buy from (24%), understanding the customer as an individual (23%), and treating data with respect (17%), were the key drivers.

24%
of consumers would feel closer to certain brands if they feel safe to buy from

23%
of consumers would feel closer to certain brands if they feel they understand what they need better

17%
of consumers would feel closer to certain brands if they treat their data with respect

67%
year-on-year increase in consumers who would feel closer to a brand if they provide extra value for them to stay loyal

The Cost of Getting Loyalty Wrong

Emotional and genuine loyalty is an outcome — a goal you can only achieve by truly knowing your customers and carefully nurturing every relationship you have — every action, input, and communication a customer receives should make them feel valued and respected.

However, all too many brands still invest far more resources in customer acquisition strategies, rather than customer retention. Rather than accrue new customers in the immediacy, there should be a focus on maintaining relationships with one's current customer base with trust becoming as much a differentiator as price and product.

Almost a third of consumers have switched away from a brand they previously liked to buy from, with many citing a competitor having better promotions (31%), or buying options (26%), because they didn't feel valued as a customer (21%), or because of its stance on social, political, or environmental issues (19%).

31% of consumers have left a favored brand because other brands have better promotions

26% of consumers have left a favored brand because other brands have better buying options

21% of consumers have left a favored brand because they didn't feel valued as a customer

19% of consumers have left a favored brand because of its stance on social, political, or environmental issues

20

Loyalty is On The Rise

Loyalty programs drive sales and increase customer lifetime value — and keep profitable customers coming back — and the good news is that consumers love them and the vast majority are willing to increase their participation.

Consumers are participating in loyalty programs, even if you are not offering one. Only 8% of consumers are less likely to participate in a loyalty program than last year — a staggering 38% decrease on last year. Your customers aren't just ready for a loyalty offering, they expect it. One that truly rewards them as an individual and goes beyond a freebie every tenth purchase or a raft of points that will never be redeemed.

Most consumers tend to already be members of existing loyalty programs (92%) and there's been an 11% year-on-year increase on those that are willing to increase their participation.

11%

year-on-year increase in consumers who are more likely to take part in a loyalty program than last year

40%

of consumers more likely to take part in a loyalty program than last year

38%

year-on-year decrease in consumers who are less likely to take part in a loyalty program than last year
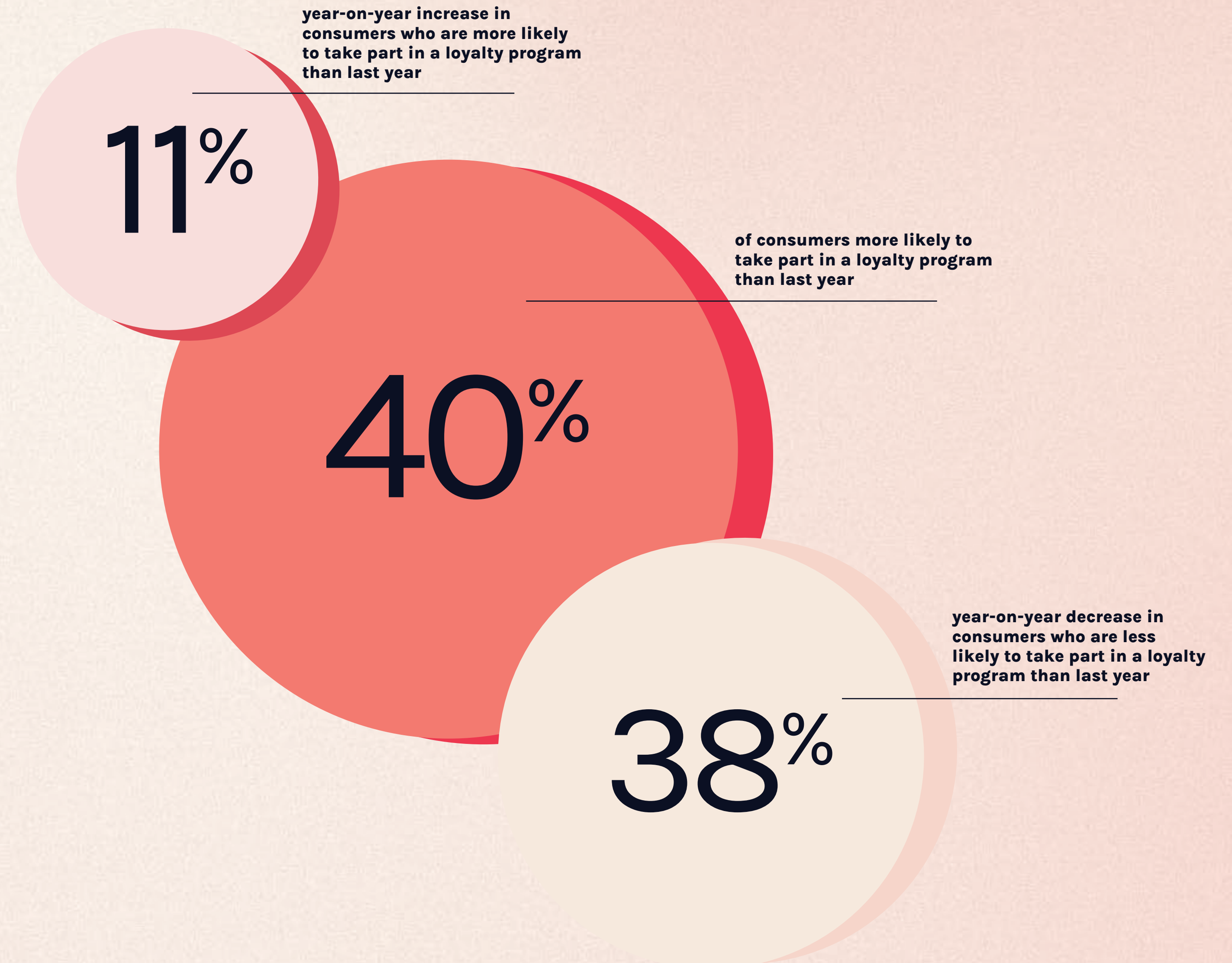
A Loyalty Program is Not a Rewards Program

A lot of brands think they need a points-based rewards program, because all-too-many conflate the term loyalty program with rewards program. Points to win prizes is merely one of the many different tactics one can use to help engender loyalty.

The modern consumer still values a discount for their loyalty (64%), or points to keep them coming back (59%), but the real story is the rise in consumers valuing all of the things that make your brand unique, and, in turn, makes them feel special.

There have been huge year-on-year increases in consumers who love engaging interactive experiences like contests and sweepstakes (73%), those seeking early or exclusive access to products (58%), personalized product recommendations based on their self-reported preferences (56%), those that would like brand recognition (45%), and consumers who want to feel part of the brand's community (33%).

The results make it clear that consumers expect comprehensive loyalty programs that go beyond the generic. The heart of loyalty is not merely the cheapest price-point, but a brand that can foster community, recognizes the customer as an individual, and delivers content and product recommendations that reflect this.

73%
year-on-year increase in consumers who want contests and sweepstakes in return for their loyalty

58%
year-on-year increase in consumers who are loyal for exclusive or early access to products, events, and services

56%
year-on-year increase in consumers who want suggested products and services based on their preferences for their loyalty

45%
year-on-year increase in consumers who want brand recognition for their loyalty

33%
year-on-year increase in consumers who want to be part of a brand's community for their loyalty

Creepy Marketing Needs to be Left in 2021

Like the pandemic, tankers getting stuck in the Suez Canal, and Tiger King, forms of creepy marketing need to be left in 2021. What marketers view as exciting innovations in data gathering to drive personalization initiatives, are actually viewed as rather surreptitious by consumers. Just because marketers have access to certain data (for now), doesn't mean they should collect it or use it.

The overwhelming majority of consumers feel adverts derived from location data, cookie tracking, and listening smart devices are creepy, not cool, and they're split on the use of chatbots accessing purchase history and ads on social media based on recent shopping experiences — so tread carefully with these.
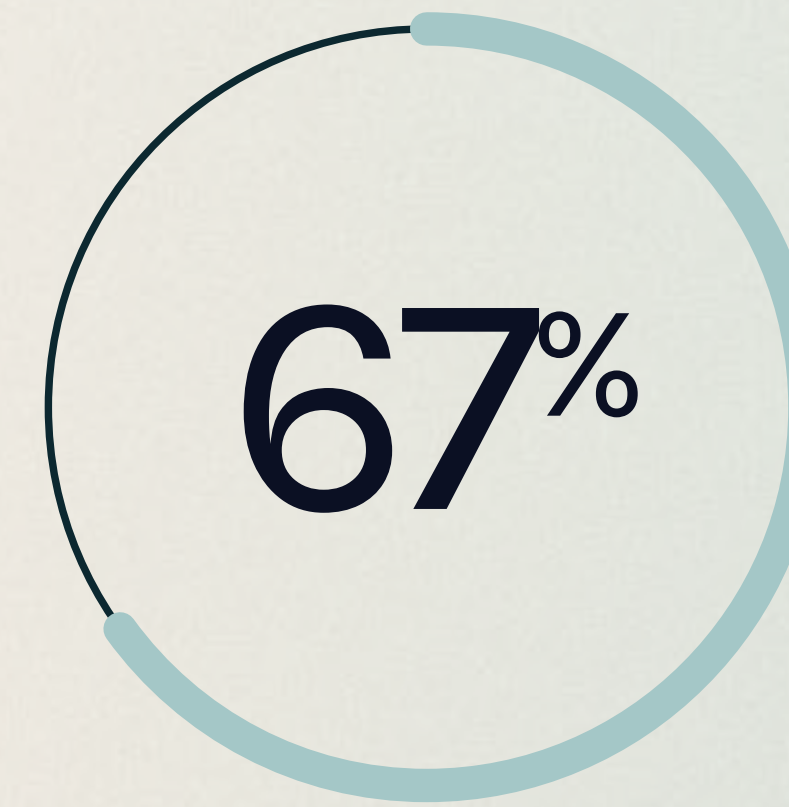
67% of consumers say ads based on location data are creepy, not cool
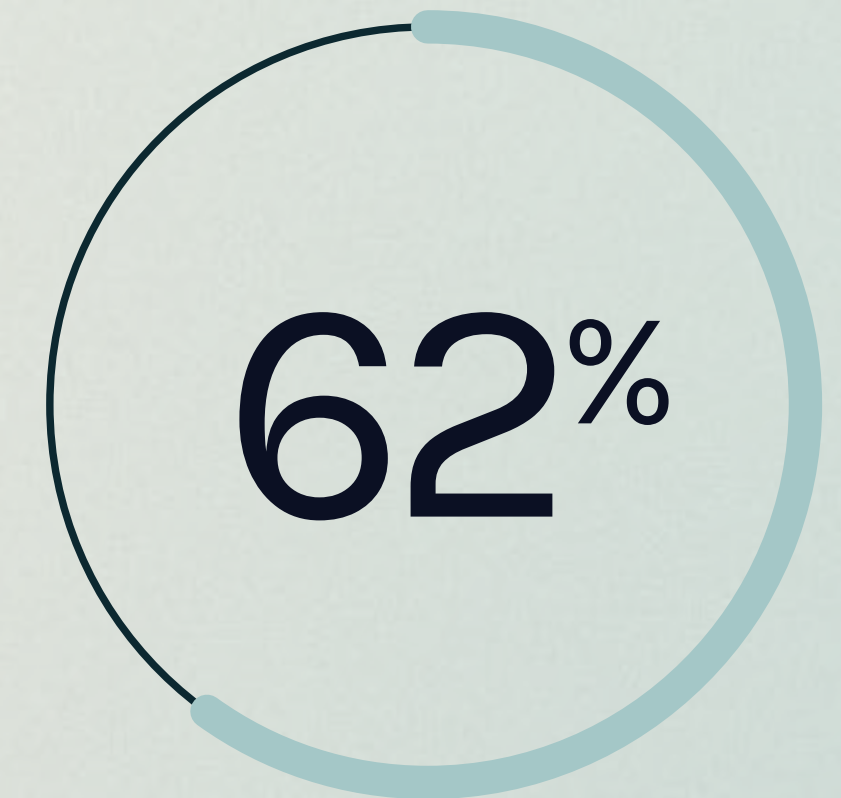
of consumers think retargeting ads derived from cookie tracking are creepy, not cool **62%**
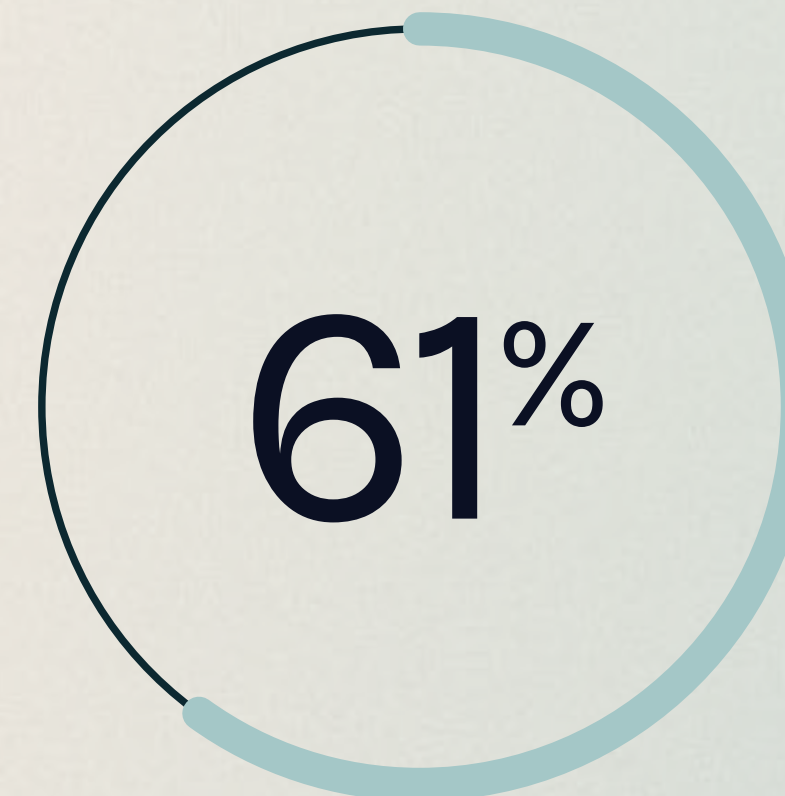
61% of consumers say ads related to something they talked about near a smart device are creepy, not cool

The Value Exchange Economy

If you want your customers' preference data you need to offer something tangible in return — this is the value exchange economy. It is possible for marketers to collect this golden data, but alas it's not a case of simply "ask and ye shall receive." More than ever, modern consumers expect to be entertained, engaged, and receive something in return for their attention and personal data.

But it needn't always be a red-letter prize or huge discount. Sure, 93% of consumers are prepared to trade data for a discount, 92% for loyalty points, and 84% for the chance to win a prize. But consumers are actually sharing behavioral and psychographic data for exclusive access (86%), unlocking content (61%), and to feel part of a brand's community (55%).

92% of consumers will trade personal and preference data for loyalty points

55% of consumers will trade personal and preference data to feel part of a brand's community

86% of consumers will trade personal and preference data for early or exclusive access
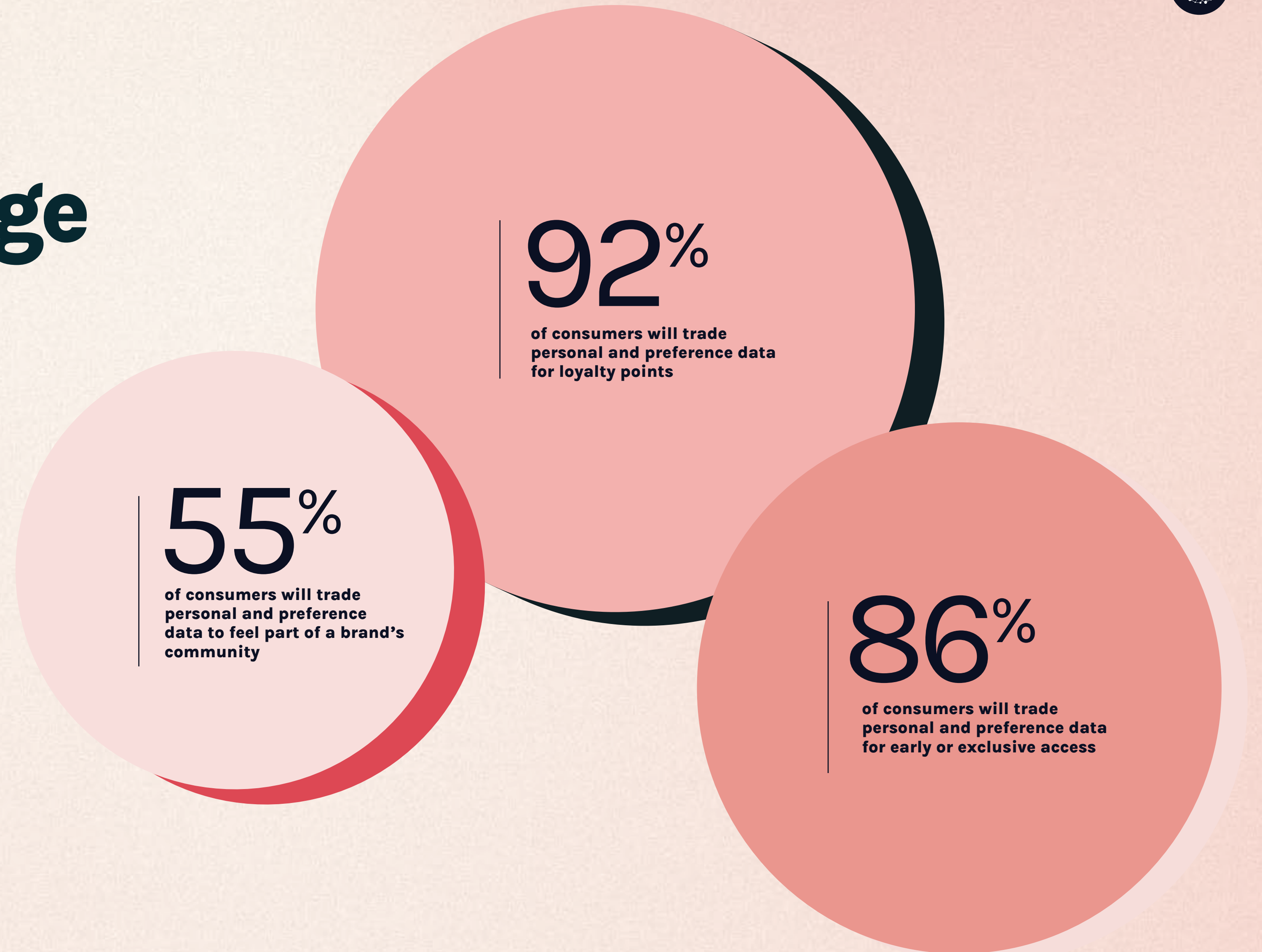
Building Mutually Beneficial Relationships

Year-on-year increases in consumers who are willing to trade their preference data for a raft of value exchanges.

11%
rise in consumers who will share preference data in return for a discount

17%
rise in consumers who will share preference data in return for unlocking content

17%
rise in consumers who will share preference data in return for loyalty points

18%
rise in consumers who will share preference data for the chance to win a prize

19%
rise in consumers who will share preference data to feel part of a brand's community

27%
rise in consumers who will share preference data for exclusive access

Consumer's Will Share Their Preference Data for Better Service

The majority of consumers are comfortable sharing data about themselves like clothing size, age and family make-up for a better service (55%), but most are not happy to share a photograph (78%), their location (59%), or identity details (58%). The key is only asking for information that truly empowers you to build more meaningful relationships with your customer and deliver on the promise of a more-personalized service.

Brands can deliver this through interactive experiences that conduct research, accrue opt-ins, and deliver an altogether better experience with a value exchange for the consumer.

Questionnaires, polls, quizzes, contests or social stories can incorporate reward mechanics that give consumers a genuine reason to engage and submit their first- and zero-party data.

Capturing consumer motivations, intentions, interests, and preferences at scale allows for a personalized customer experience. And by leveraging the right mechanics, and offering a value exchange, your customers will tell you what products they desire, what they look for in a service, and what motivates them to purchase.

55%
of consumers are comfortable sharing data about themselves like clothing size, age, and family make-up for better service

59%
of consumers are not comfortable sharing their location data for better service
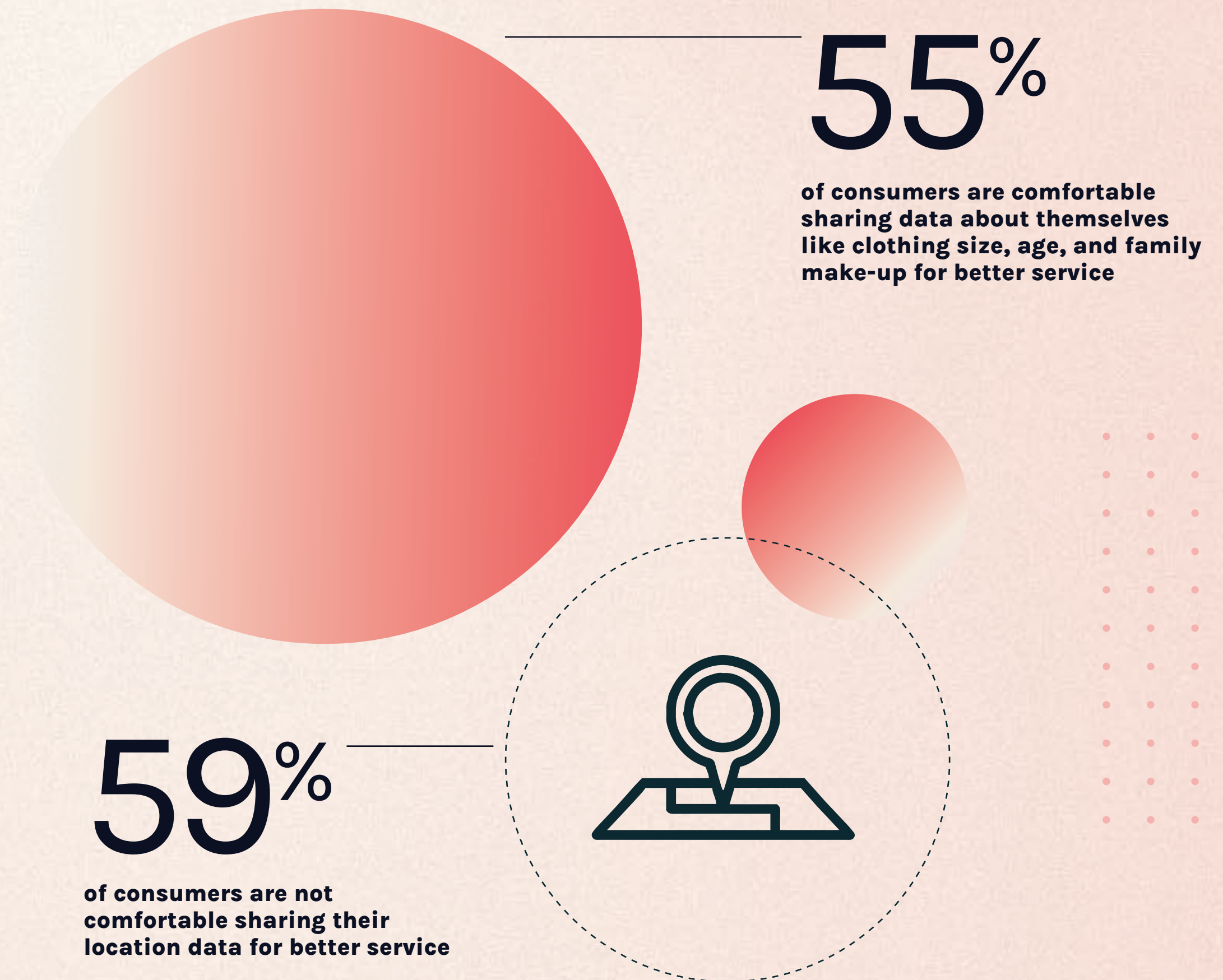
"Zero-party data is that which a customer intentionally and proactively shares with a brand. It can include preference center data, purchase intentions, personal context, and how the individual wants the brand to recognize them."

- Forrester

Consumers are More Privacy Conscious Than Ever, and They're Getting Proactive about it

We're a good few years on from the Cambridge Analytica scandal and many of us marketers might have become headline-blind to the constant stories of privacy breaches, surreptitious data gathering by big tech companies and burgeoning privacy legislation, and the eye-watering fans that come with it. But consumers have not, and they're ever-more cognizant of the value of their data, and are taking proactive steps to protect it.

More than half of consumers are using a PC cleaner (56%), and well over a third have turned to ad blocking tech

(38%), and password managers (37%). What's startling however is that there are huge year-on-year uplifts in consumers personally using an incognito browser (50%), PC cleaner (48%), password generator (40%), ad blocker (37%), paid for premium software (32%) and password manager (31%).

The solution is to not find ways to circumvent this trend but commit to forging honest, meaningful relationships, and adopting a fully-fledged privacy-first strategy.

56%
of consumers use a PC cleaner

38%
of consumers have installed ad blocking tech

37%
of consumers use a password manager
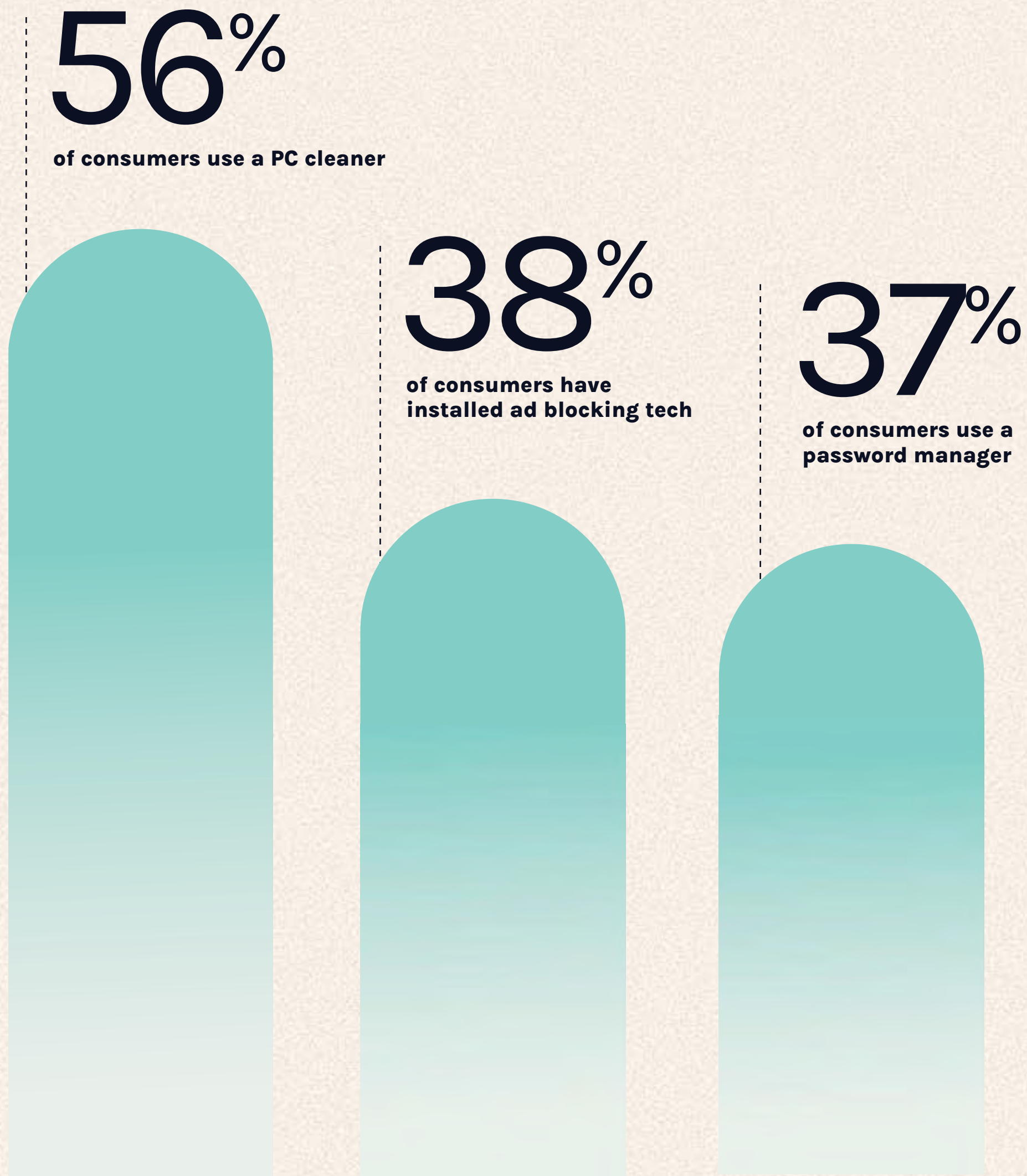
Privacy Tech Adoption is on the Rise

Year-on-year rises in consumers taking control of their data.

31%
year-on-year increase in consumers using a password manager

32%
year-on-year increase in consumers using paid-for premium software

37%
year-on-year increase in consumers using an ad blocker

40%
year-on-year increase in consumers using a password generator

48%
year-on-year increase in consumers using a PC cleaner

50%
year-on-year increase in consumers using an incognito browser

The Death of the Cookie

As Google cements plans to comprehensively curtail third-party cookie tracking within the next couple of years, and Firefox, Safari et al., scramble to follow suit, the way in which marketers connect with consumers is undergoing radical change.

Since those early days of dial-up, when Amazon was merely a bookseller and searches were made by "asking Jeeves" — cookies have been the norm for following users around the internet, and reporting back activity and information to marketers and data vendors. For three decades this has been the de facto way for marketers to marginally personalize their campaigns to consumers.

Although these behemoth browsers' privacy pivot is a win for privacy-conscious consumers, with 62% thinking retargeting ads derived from cookie tracking are creepy. Only 31% are glad they're being withdrawn, and the vast majority of consumers are blissfully unaware cookies are being phased-out (72%) in the first place.

Ultimately it's a headache for marketers wedded to third-party cookies to power their advertising, as well as perpetuating Google's anti-competitive walled garden. These sweeping changes to the martech and adtech industries reinforce the need for marketers to shift to a first- and zero-party data strategy to power their advertising and marketing initiatives. The cookie is truly crumbling.

13%
Only 13% of consumers will miss cookies and think they make for a better online experience

37%
Just over a third of consumers are optimistic brands will come up with a way of sharing data that is fairer for everyone

72%
The vast majority of consumers are unaware that cookies are being withdrawn soon

Consumers Trust Brands with Their Data More than Ever Before

Crisis can be a catalyst for change, and for almost all verticals the COVID-19 pandemic has accelerated the way in which brands provide a digital service and innovated how they deliver their products.

For many, it's been an opportunity to build deeper, more meaningful relationships with customers, learn more about them, and use that data to provide personalized marketing and services. Consumers tell us they love brands who are responsible with their data, with nearly a quarter citing they are loyal to certain brands because they trust them to treat their data with respect.

While the COVID-19 pandemic has been unequivocally a disaster for communities and brands, we have seen a rise in consumer trust — and this is a trend we should all strive to continue.

Trust in Every Industry is on the Rise

Year-on-year increases in trust in the following industries to use data to provide personalized marketing and services.

Restaurant
8%

Beauty & Fashion
9%

Travel & Hospitality
9%

Furniture & Household Goods
11%

Food & Grocery Shopping
11%

Sports & Entertainment
13%

Household Appliances
14%

Financial Services & Banking
16%

Gaming & Gambling
24%
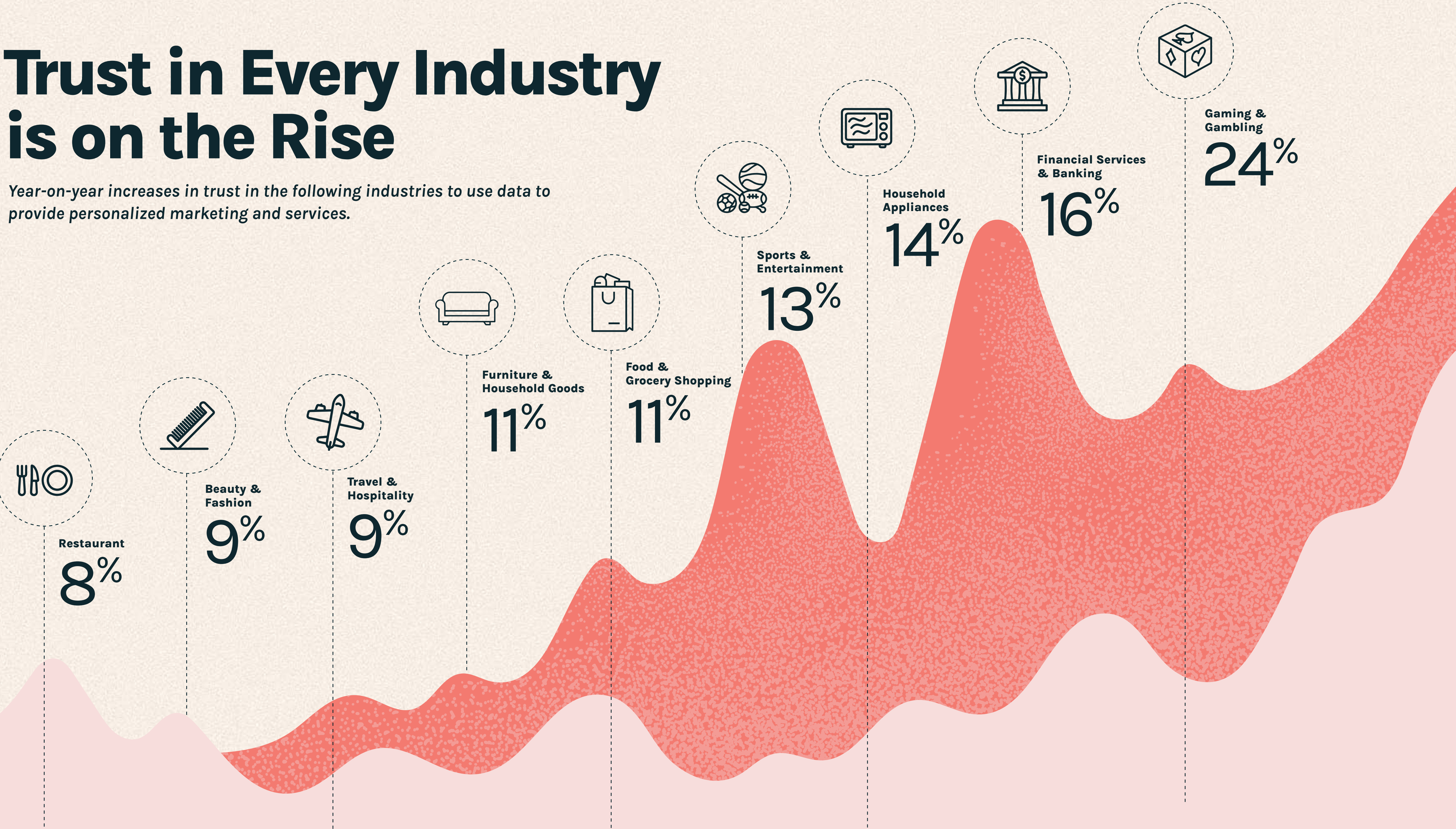
When the Trust is Gone, it Might be Time to Break-up (with Social Media)

Social channels were not built for marketers. The vast majority of consumers use it as a digital space to engage with their peers, and brand interaction is often to sound-off about poor service. If you were at a party you wouldn't want an overzealous salesperson following you round while you tried to chat to friends.

Social media advertising is already a vertical hallmarked by a lack of transparency, performance fraud, ad blocking, and spamming ad frequency that has resulted in the abject engagement rates and lack of trust we see today. More importantly it's traditionally perpetuated by formats that are no longer fit for purpose — chasing views, clicks, and other vanity metrics instead of what really matters, engagement.

For consumers the deep mistrust of social media comes after a difficult spell for the sector in which Facebook et al., have been accused of eroding privacy, harming children and undercutting democracy. The Cambridge Analytica scandal highlighted big tech's ability and willingness to harvest data and subvert democracy, while there have been countless examples of online radicalization and misinformation throughout the pandemic on everything to vaccines and the virus itself.

58%
of consumers do not trust social media platforms with their data

27%
Only 27% of consumers trust social media platforms to use their data responsibly moving forward

Start Owning Your Audience

The future of marketing to individuals with relevance is about asking them about their interests, motivations and desires, rather than inferring or snooping on them. With a zero-party data strategy, brands can connect directly to consumers and gather the data that the social media "Walled Gardens" so jealously guard.

Marketers can start reconnecting with modern consumers by switching from interruptions to experiences. Instead of erroneously spending money on pushing their message wider and further, they can shift to a strategy rooted in offering value for engagement, and begin to unlock customer relationships directly.

What's more, the data backs up that consumers just don't trust social media platforms any more. 69% are sharing less data, over a third are deleting their accounts (37%), and well over half are actively engaging less for their mental health (57%). The vast majority of consumers believe social media platforms don't do enough to delete harmful account (74%), and is guilty of fueling political polarization (66%).
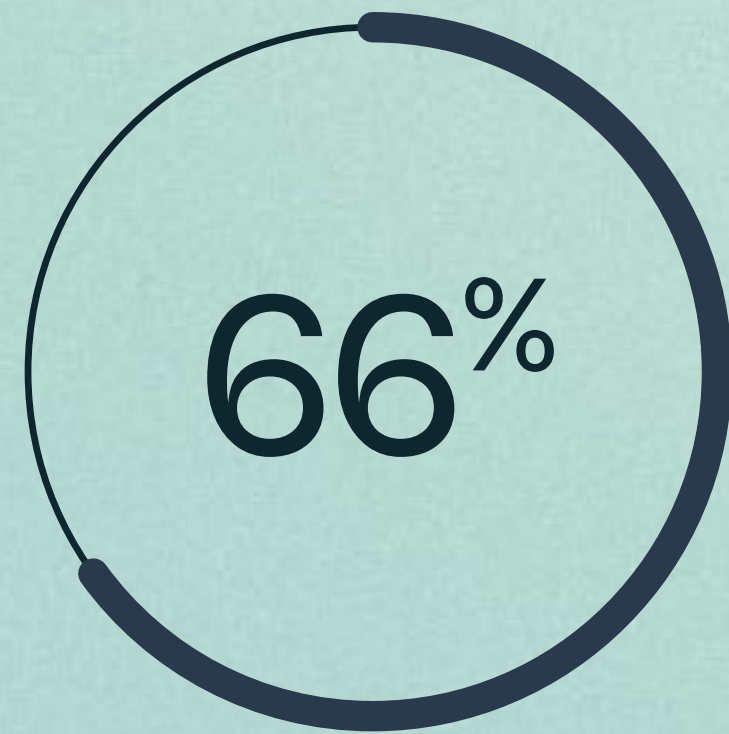
66% of consumers are concerned by the polarization of political opinion on social media platforms
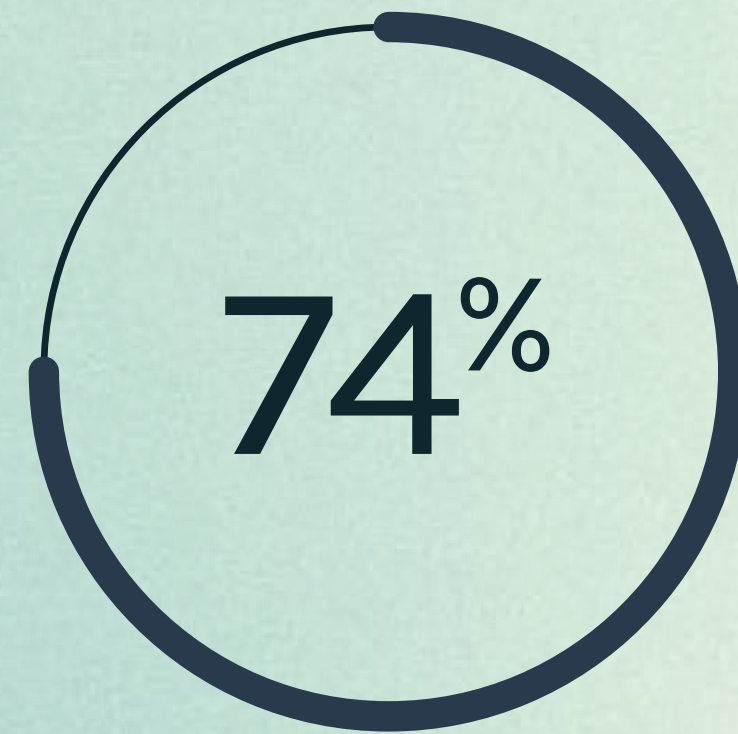
74% of consumers believe social media platforms don't do enough to delete harmful content
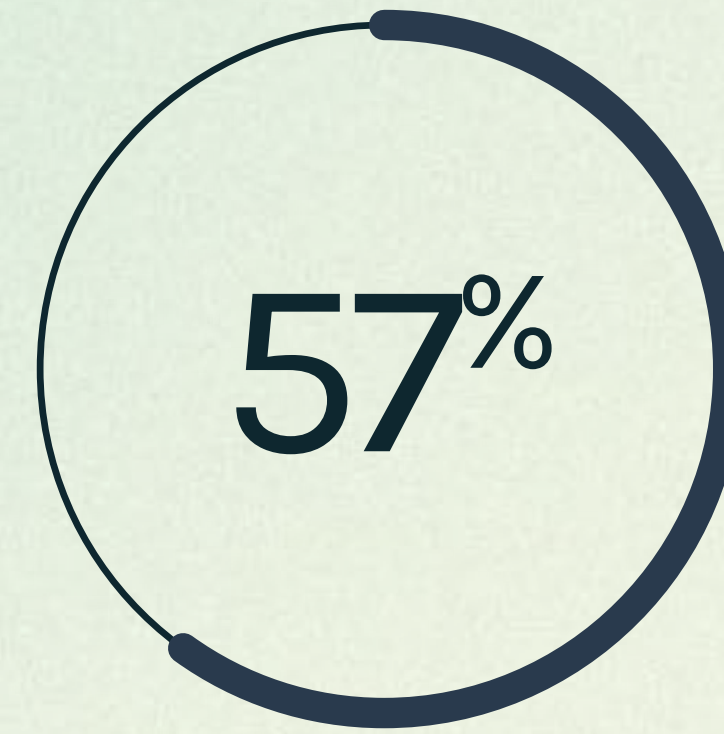
57% of consumers are actively engaging less with social media platforms for sake of their mental health
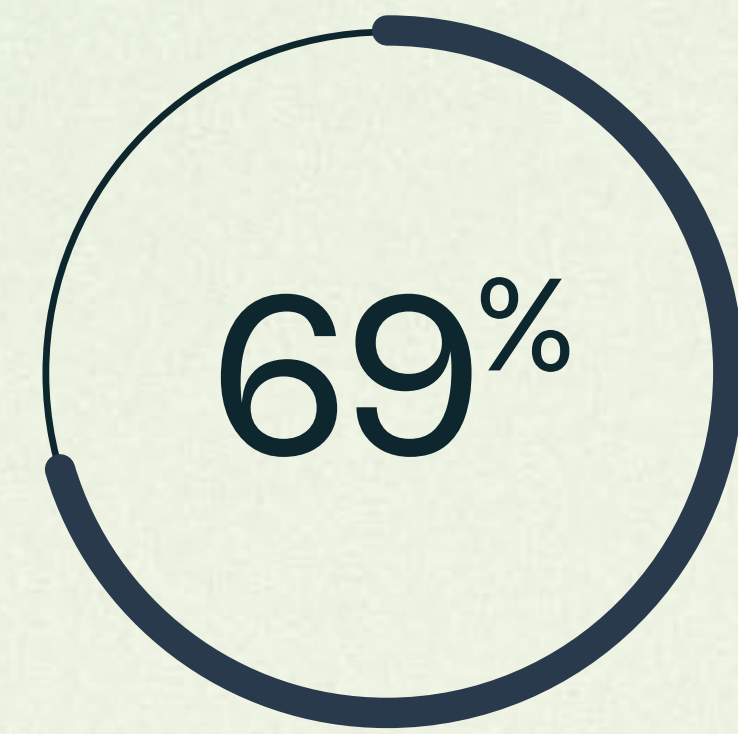
69% of consumers are sharing less data with social media platforms because it's too hard to track how it's being used
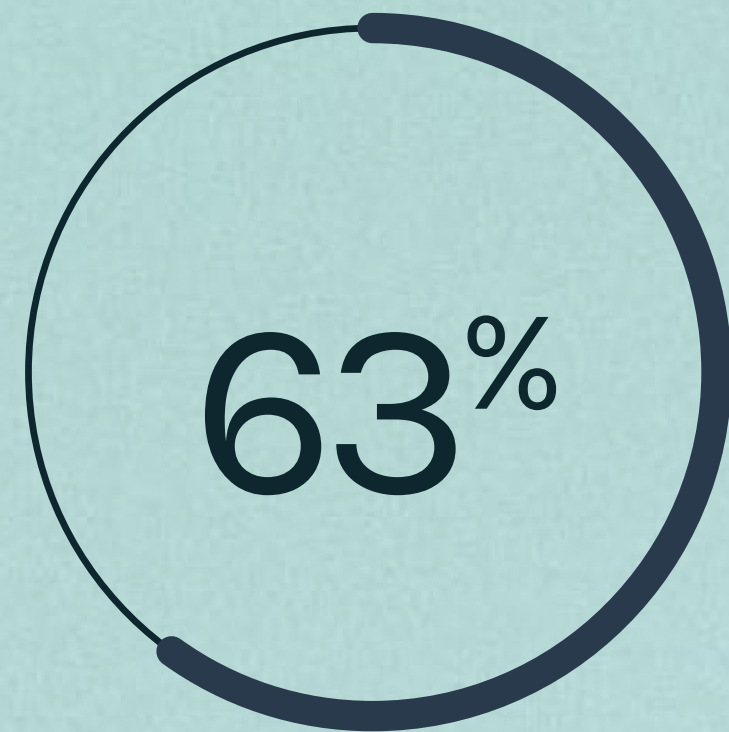
63% of consumers feel manipulated by algorithm rules which control what content they see
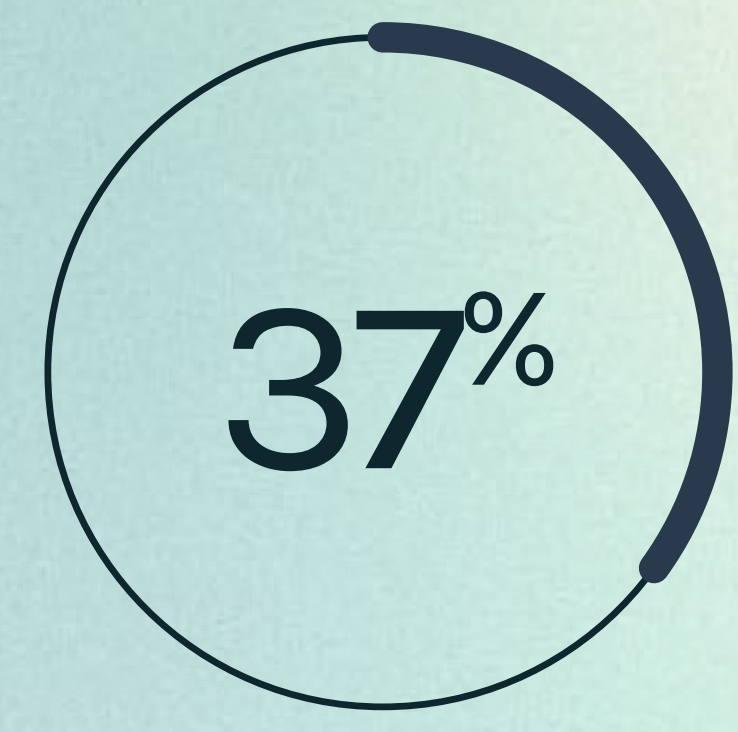
37% of consumers have closed or stopped using an account in last year because they have been upset by posts they have seen
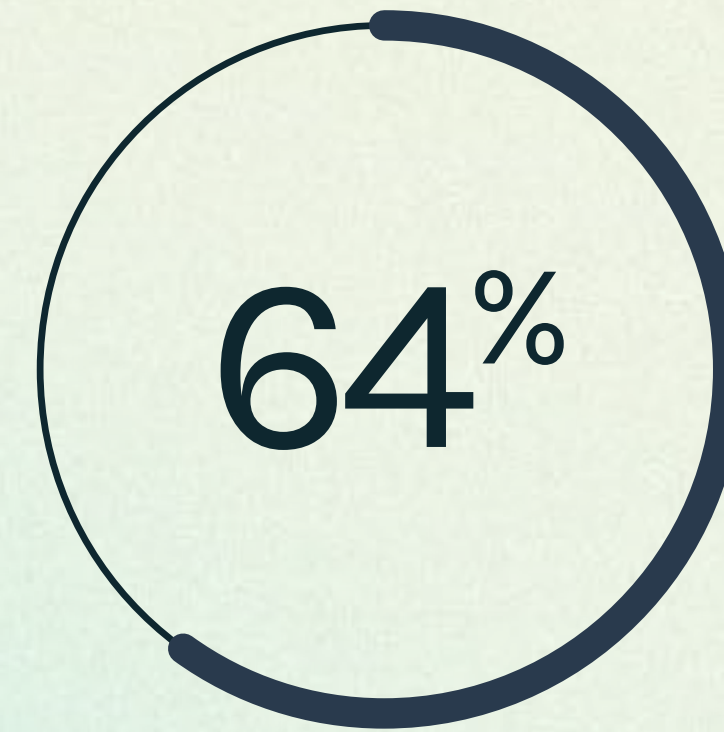
64% of consumers do not trust the advertising they see on social media platforms
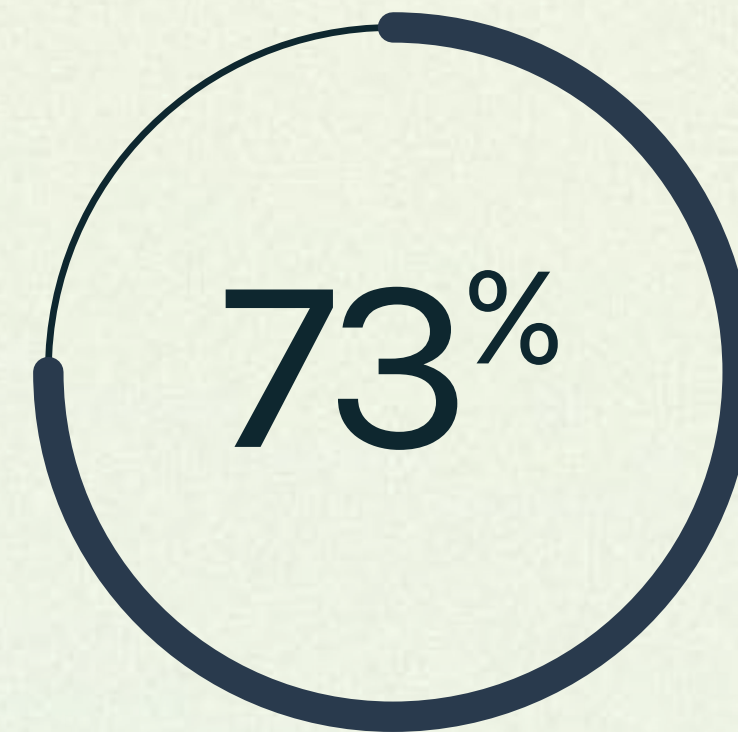
73% of consumers see a lot content these days which doesn't interest them

Consumers are Shopping More Frequently Online than Ever Before

Brick-and-mortar stores might be back open for business, but the shift online forced by the COVID-19 pandemic has not abated. Digital natives have been joined online by consumers who traditionally choose bricks over clicks, and every vertical has seen a sizeable increase in consumers making purchases from the comfort of their home or on their smartphone.

Like it or not, for now, the pandemic has changed the way we "internet" and much of this shift appears to be permanent. The adoption of digital technologies has advanced by several years and marketers that once mapped digital strategy in one to three year phases are scaling their initiatives in a matter of days or weeks.

To win and maintain relationships with today's tech-savvy consumers, marketers need to connect with them on the right channel, at the right time. It's imperative that brands match the customer service expectations that they would enjoy in-store, online and find new and innovative ways to add value to their customer's lives to keep them loyal.

Ecommerce Continues to Rise

Year-on-year increases in industries consumers have made an online purchase from.

Restaurant
8%

Food & Grocery Shopping
12%

Beauty & Fashion
14%

Sports & Entertainment
14%

Home Improvement, Garden & Pets
15%

Furniture & Household Goods
24%

Household Appliances
41%

Financial Services & Banking
47%

Travel & Hospitality
48%

Gaming & Gambling
50%
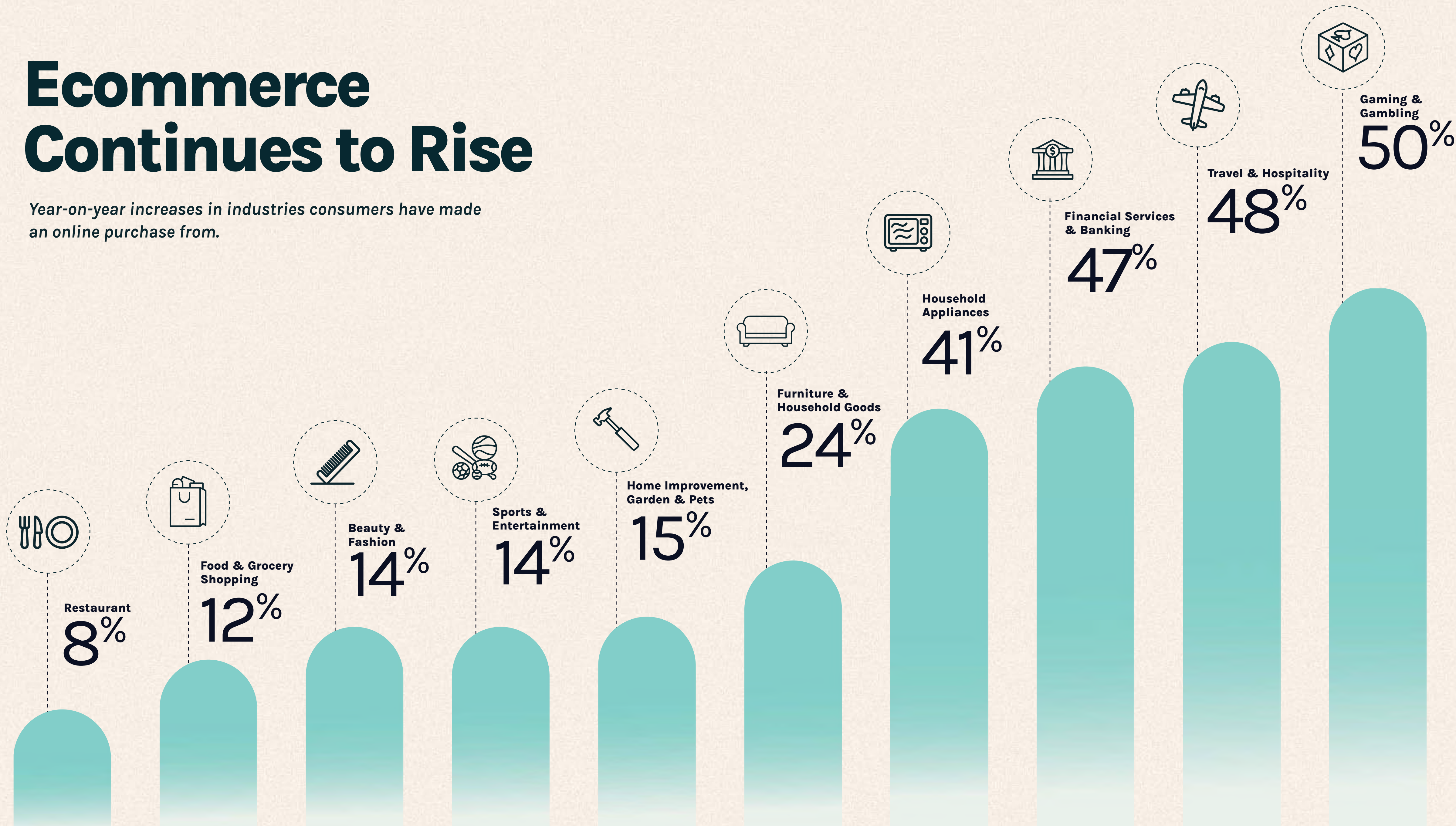
Brands are Providing a Better Online Customer Experience

Price will probably always be king, but a good online customer experience is queen. Consumers are influenced by a number of factors when making purchases, with price of course always being a determining factor. However, a staggering 80% of consumers have a favorite brand as it provides a consistent customer experience.

The idea of a true omnichannel experience, where brands seamlessly blend the physical with the digital, can seem deceptively easy to achieve. Catering to individual customers' preferences and actively steering them toward the most efficient resolution is tough, but brands are getting there. And customers want it too, expecting consistent information merely a click away irrespective of the touchpoint they are choosing to engage with.

Delivering a better online customer experience is about putting the customer at the heart of everything, where all channels and touchpoints revolve around them, not merely the product — that means breaking down barriers, both organizationally and within your tech stack, to create a unified commerce approach.

Online Customer Experience is Trending Up

Year-on-year increases in consumers declaring specific industries provide the best online customer experience.

Food & Grocery Shopping
25%

Beauty & Fashion
38%

Sports & Entertainment
38%

Restaurant
50%

Gaming & Gambling
60%

Travel & Hospitality
70%

Financial Services & Banking
83%

Home Improvement, Garden & Pets
100%

Furniture & Household Goods
100%

Household Appliances
133%
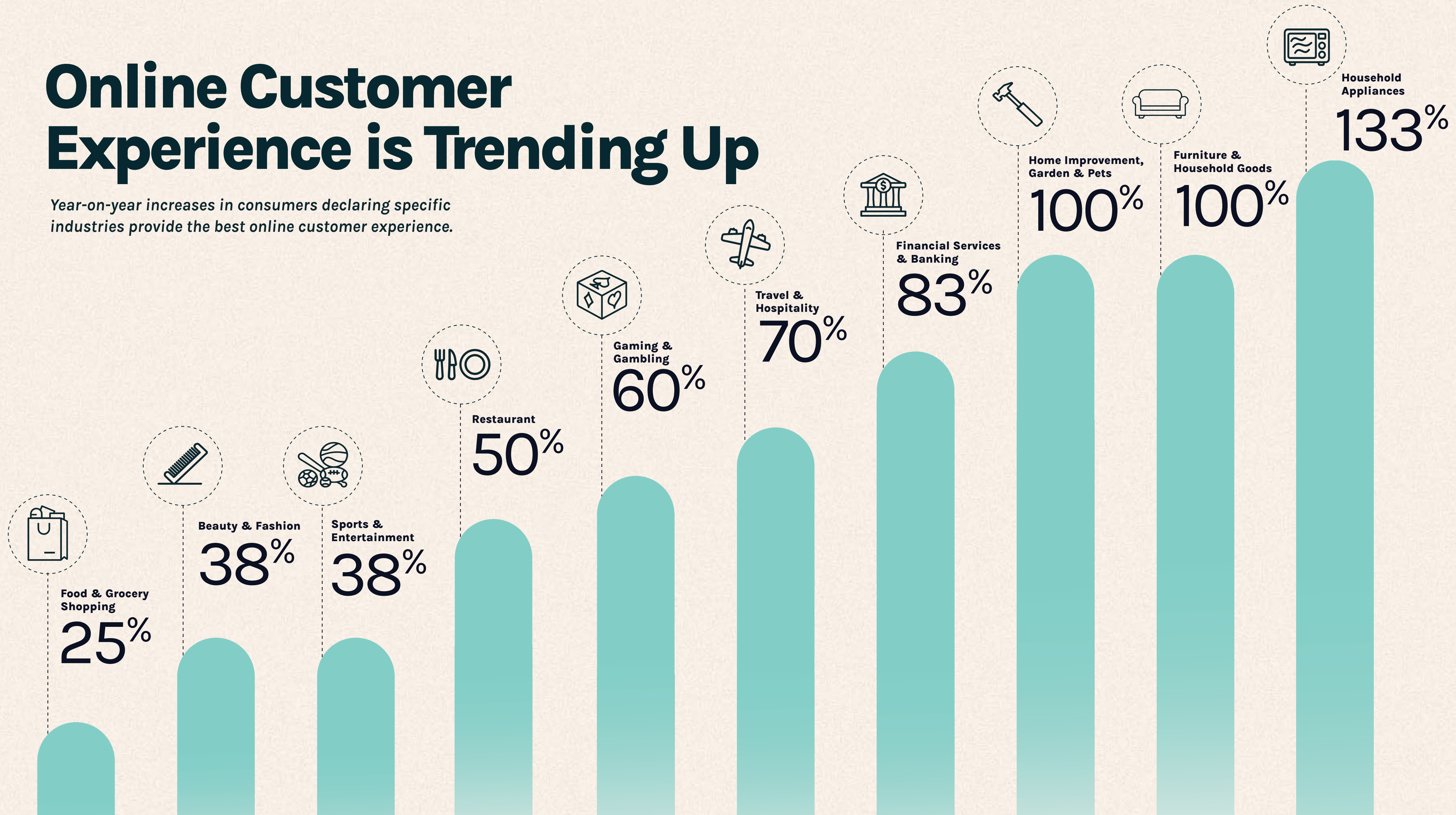
Cheetah Digital

It's time to look beyond transactional data to build thriving customer relationships at every touchpoint. With Cheetah Digital's Customer Engagement Suite, you have an entire platform at your fingertips to build the most **relevant, integrated, and profitable customer experiences**.

Cheetah Engagement Data Platform

Our foundational data layer and personalization engine enables marketers to drive data from intelligent insights to action at speed and scale.

Cheetah Experiences

We help deliver interactive digital acquisition experiences that will delight customers, collect first and zero-party data, and secure valuable permissions needed to execute compliant and successful cross-channel marketing campaigns.

Cheetah Messaging

We enable marketers to create and deliver relevant, personalized marketing campaigns across all channels and touchpoints.

Cheetah Loyalty

We provide marketers with the tools to create and deliver unique loyalty programs that generate an emotional connection between brands and their customers.

Cheetah Personalization

We enable marketers to leverage the power of machine learning and automated journeys to connect with customers on a one-to-one basis.

Start building lasting customer relationships at **cheetahdigital.com**

Appendix

Have you ever made a purchase from any of the following in the last 12 months?

Australia

An email
- 18-25 Years old: 42%
- 26-40 Years old: 59%
- 41-55 Years old: 60%
- 56-75 Years old: 70%

An advertisement in social media
- 18-25 Years old: 58%
- 26-40 Years old: 55%
- 41-55 Years old: 41%
- 56-75 Years old: 27%

A post in social media
- 18-25 Years old: 54%
- 26-40 Years old: 57%
- 41-55 Years old: 38%
- 56-75 Years old: 22%

A banner ad on a website or app
- 18-25 Years old: 39%
- 26-40 Years old: 31%
- 41-55 Years old: 31%
- 56-75 Years old: 18%

SMS/MMS message
- 18-25 Years old: 19%
- 26-40 Years old: 24%
- 41-55 Years old: 17%
- 56-75 Years old: 12%

France

An email
- 18-25 Years old: 41%
- 26-40 Years old: 49%
- 41-55 Years old: 53%
- 56-75 Years old: 62%

An advertisement in social media
- 18-25 Years old: 46%
- 26-40 Years old: 49%
- 41-55 Years old: 42%
- 56-75 Years old: 17%

A post in social media
- 18-25 Years old: 52%
- 26-40 Years old: 46%
- 41-55 Years old: 33%
- 56-75 Years old: 18%

A banner ad on a website or app
- 18-25 Years old: 30%
- 26-40 Years old: 33%
- 41-55 Years old: 35%
- 56-75 Years old: 27%

SMS/MMS message
- 18-25 Years old: 29%
- 26-40 Years old: 32%
- 41-55 Years old: 33%
- 56-75 Years old: 30%

Japan

A banner ad on a website or app
- 18-25 Years old: 38%
- 26-40 Years old: 51%
- 41-55 Years old: 51%
- 56-75 Years old: 61%

An advertisement in social media
- 18-25 Years old: 33%
- 26-40 Years old: 45%
- 41-55 Years old: 29%
- 56-75 Years old: 31%

An email
- 18-25 Years old: 22%
- 26-40 Years old: 28%
- 41-55 Years old: 37%
- 56-75 Years old: 40%

A post in social media
- 18-25 Years old: 40%
- 26-40 Years old: 45%
- 41-55 Years old: 25%
- 56-75 Years old: 11%

SMS/MMS message
- 18-25 Years old: 23%
- 26-40 Years old: 27%
- 41-55 Years old: 16%
- 56-75 Years old: 9%

Spain

A post in social media
- 18-25 Years old: 51%
- 26-40 Years old: 56%
- 41-55 Years old: 46%
- 56-75 Years old: 36%

An email
- 18-25 Years old: 39%
- 26-40 Years old: 44%
- 41-55 Years old: 52%
- 56-75 Years old: 54%

An advertisement in social media
- 18-25 Years old: 46%
- 26-40 Years old: 53%
- 41-55 Years old: 44%
- 56-75 Years old: 34%

A banner ad on a website or app
- 18-25 Years old: 32%
- 26-40 Years old: 35%
- 41-55 Years old: 36%
- 56-75 Years old: 26%

SMS/MMS message
- 18-25 Years old: 26%
- 26-40 Years old: 30%
- 41-55 Years old: 37%
- 56-75 Years old: 26%

UK

An email
- 18-25 Years old: 48%
- 26-40 Years old: 44%
- 41-55 Years old: 59%
- 56-75 Years old: 60%

A post in social media
- 18-25 Years old: 54%
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- 56-75 Years old: 20%

SMS/MMS message
- 18-25 Years old: 28%
- 26-40 Years old: 22%
- 41-55 Years old: 18%
- 56-75 Years old: 11%

US

An email
- 18-25 Years old: 43%
- 26-40 Years old: 56%
- 41-55 Years old: 57%
- 56-75 Years old: 63%

A post in social media
- 18-25 Years old: 61%
- 26-40 Years old: 62%
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An advertisement in social media
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SMS/MMS message
- 18-25 Years old: 27%
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- 56-75 Years old: 13%

Global summary

An email
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- 41-55 Years old: 53%
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A post in social media
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An advertisement in social media
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- 56-75 Years old: 29%

SMS/MMS message
- 18-25 Years old: 25%
- 26-40 Years old: 29%
- 41-55 Years old: 25%
- 56-75 Years old: 16%

If you had to pick one phrase to describe you as a shopper, which would it be?

Australia

I will get the best price, it's all about value for my spending
- 41%
- 46%
- 52%
- 56%

Products have to fit my style
- 32%
- 21%
- 21%
- 16%

The faster and easier it is, the better i like it
- 14%
- 19%
- 13%
- 13%

I want brands to behave responsibly and I vote with my wallet
- 14%
- 14%
- 13%
- 16%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

France

I will get the best price, it's all about value for my spending
- 36%
- 47%
- 47%
- 37%

The faster and easier it is, the better i like it
- 24%
- 22%
- 22%
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- 19%
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- 20%

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- 12%
- 13%
- 20%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Japan

Products have to fit my style
- 46%
- 48%
- 42%
- 47%

I will get the best price, it's all about value for my spending
- 25%
- 25%
- 32%
- 34%

I want brands to behave responsibly and I vote with my wallet
- 19%
- 18%
- 16%
- 13%

The faster and easier it is, the better i like it
- 10%
- 8%
- 10%
- 6%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Spain

I will get the best price, it's all about value for my spending
- 34%
- 38%
- 31%
- 30%

Products have to fit my style
- 26%
- 26%
- 25%
- 28%

I want brands to behave responsibly and I vote with my wallet
- 22%
- 18%
- 23%
- 23%

The faster and easier it is, the better i like it
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- 20%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

UK

I will get the best price, it's all about value for my spending
- 42%
- 41%
- 49%
- 46%

Products have to fit my style
- 20%
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- 22%

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US

I will get the best price, it's all about value for my spending
- 39%
- 37%
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- 51%

Products have to fit my style
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Global summary

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- 17%
- 15%

I want brands to behave responsibly and I vote with my wallet
- 18%
- 15%
- 16%
- 17%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Which of the following, if any, describe you? (1-2)

Australia

I've used my mobile phone while in a store to research or help me decide to make a purchase
- 61%
- 68%
- 50%
- 36%

I've received or sent money from my mobile phone to another individual
- 59%
- 60%
- 42%
- 38%

I've browsed for products in a physical store but purchased online
- 49%
- 54%
- 52%
- 42%

I've bought something because of an email I viewed on my mobile phone
- 38%
- 51%
- 44%
- 48%

I've made a product or service purchase in an app from my mobile phone
- 45%
- 54%
- 50%
- 31%

I've bought digital content via my mobile phone (including apps, music or video)
- 45%
- 50%
- 29%
- 17%

I've bought something because of an SMS or MMS message I received on my mobile phone
- 15%
- 19%
- 14%
- 13%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

France

I've used my mobile phone while in a store to research or help me decide to make a purchase
- 58%
- 57%
- 57%
- 39%

I've made a product or service purchase in an app from my mobile phone
- 55%
- 52%
- 45%
- 36%

I've browsed for products in a physical store but purchased online
- 45%
- 49%
- 42%
- 46%

I've bought something because of an email I viewed on my mobile phone
- 31%
- 40%
- 38%
- 41%

I've received or sent money from my mobile phone to another individual
- 45%
- 43%
- 35%
- 19%

I've bought something because of an SMS or MMS message I received on my mobile phone
- 17%
- 27%
- 26%
- 26%

I've bought digital content via my mobile phone (including apps, music or video)
- 33%
- 26%
- 25%
- 12%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Japan

I've made a product or service purchase in an app from my mobile phone
- 38%
- 51%
- 51%
- 53%

I've browsed for products in a physical store but purchased online
- 41%
- 53%
- 55%
- 56%

I've used my mobile phone while in a store to research or help me decide to make a purchase
- 43%
- 51%
- 46%
- 40%

I've bought digital content via my mobile phone (including apps, music or video)
- 43%
- 50%
- 43%
- 27%

I've received or sent money from my mobile phone to another individual
- 26%
- 28%
- 32%
- 28%

I've bought something because of an email I viewed on my mobile phone
- 21%
- 29%
- 29%
- 26%

I've bought something because of an SMS or MMS message I received on my mobile phone
- 13%
- 18%
- 11%
- 9%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Spain

I've made a product or service purchase in an app from my mobile phone
- 61%
- 60%
- 70%
- 62%

I've received or sent money from my mobile phone to another individual
- 54%
- 56%
- 62%
- 53%

I've used my mobile phone while in a store to research or help me decide to make a purchase
- 62%
- 56%
- 55%
- 49%

I've browsed for products in a physical store but purchased online
- 43%
- 49%
- 45%
- 35%

I've bought digital content via my mobile phone (including apps, music or video)
- 45%
- 42%
- 39%
- 19%

I've bought something because of an email I viewed on my mobile phone
- 20%
- 28%
- 37%
- 27%

I've bought something because of an SMS or MMS message I received on my mobile phone
- 12%
- 13%
- 13%
- 12%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Which of the following, if any, describe you? (2-2)

UK

I've received or sent money from my mobile phone to another individual
- 58%
- 52%
- 50%
- 50%

I've made a product or service purchase in an app from my mobile phone
- 44%
- 47%
- 42%
- 45%

I've used my mobile phone while in a store to research or help me decide to make a purchase
- 44%
- 49%
- 40%
- 42%

I've browsed for products in a physical store but purchased online
- 33%
- 51%
- 43%
- 47%

I've bought something because of an email I viewed on my mobile phone
- 35%
- 40%
- 48%
- 44%

I've bought digital content via my mobile phone (including apps, music or video)
- 45%
- 36%
- 32%
- 22%

I've bought something because of an SMS or MMS message I received on my mobile phone
- 23%
- 14%
- 13%
- 7%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

I've made a product or service purchase in an app from my mobile phone
- 57%
- 60%
- 63%
- 46%

I've used my mobile phone while in a store to research or help me decide to make a purchase
- 58%
- 60%
- 59%
- 45%

I've received or sent money from my mobile phone to another individual
- 57%
- 55%
- 61%
- 41%

I've browsed for products in a physical store but purchased online
- 38%
- 47%
- 42%
- 44%

I've bought something because of an email I viewed on my mobile phone
- 31%
- 41%
- 47%
- 42%

I've bought digital content via my mobile phone (including apps, music or video)
- 34%
- 47%
- 43%
- 23%

I've bought something because of an SMS or MMS message I received on my mobile phone
- 18%
- 32%
- 32%
- 17%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

I've made a product or service purchase in an app from my mobile phone
- 51%
- 56%
- 56%
- 44%

I've used my mobile phone while in a store to research or help me decide to make a purchase
- 55%
- 57%
- 51%
- 42%

I've browsed for products in a physical store but purchased online
- 43%
- 50%
- 47%
- 45%

I've received or sent money from my mobile phone to another individual
- 50%
- 48%
- 47%
- 38%

I've bought something because of an email I viewed on my mobile phone
- 29%
- 38%
- 40%
- 39%

I've bought digital content via my mobile phone (including apps, music or video)
- 42%
- 40%
- 35%
- 19%

I've bought something because of an SMS or MMS message I received on my mobile phone
- 16%
- 21%
- 18%
- 15%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Thinking about your favourite brand that has communicated with you a lot over the last six months, please select whether you agree with the following statements. (Agree only) (1-2)

Australia

Statement				
Treats me like an individual	77%	77%	77%	83%
Strives to develop a relationship	71%	73%	78%	69%
Provides a consistent experience, regardless of where I interact with it	83%	88%	88%	85%
Rewards me for loyalty	80%	82%	79%	76%
Uses my data in a way that makes me feel comfortable	77%	83%	83%	80%
Influences my life beyond the products and services that it provides	66%	66%	60%	45%
Surprises me with rewards I don't expect	70%	69%	64%	55%
Makes me feel special, like a VIP	66%	71%	69%	55%

18-25 Years old · 26-40 Years old · 41-55 Years old · 56-75 Years old

France

Statement				
Treats me like an individual	68%	66%	68%	81%
Strives to develop a relationship	68%	66%	71%	74%
Provides a consistent experience, regardless of where I interact with it	76%	77%	72%	78%
Rewards me for loyalty	71%	81%	82%	80%
Uses my data in a way that makes me feel comfortable	72%	59%	57%	58%
Influences my life beyond the products and services that it provides	53%	52%	42%	33%
Surprises me with rewards I don't expect	63%	64%	62%	57%
Makes me feel special, like a VIP	53%	52%	52%	45%

18-25 Years old · 26-40 Years old · 41-55 Years old · 56-75 Years old

Japan

Statement				
Treats me like an individual	80%	79%	79%	81%
Strives to develop a relationship	74%	75%	74%	77%
Provides a consistent experience, regardless of where I interact with it	73%	76%	81%	81%
Rewards me for loyalty	78%	80%	84%	76%
Uses my data in a way that makes me feel comfortable	80%	84%	85%	77%
Influences my life beyond the products and services that it provides	65%	76%	69%	53%
Surprises me with rewards I don't expect	70%	74%	67%	54%
Makes me feel special, like a VIP	61%	58%	53%	42%

18-25 Years old · 26-40 Years old · 41-55 Years old · 56-75 Years old

Spain

Statement				
Uses my data in a way that makes me feel comfortable				
Provides a consistent experience, regardless of where I interact with it	73%	72%	72%	73%
Rewards me for loyalty				
Strives to develop a relationship				
Treats me like an individual				
Surprises me with rewards I don't expect				
Makes me feel special, like a VIP	49%	47%		
Influences my life beyond the products and services that it provides	48%	46%		

18-25 Years old · 26-40 Years old · 41-55 Years old · 56-75 Years old

47

Thinking about your favourite brand that has communicated with you a lot over the last six months, please select whether you agree with the following statements. (Agree only) (2-2)

UK

Provides a consistent experience, regardless of where I interact with it
- 18-25: 73%
- 26-40: 78%
- 41-55: 85%
- 56-75: 89%

Uses my data in a way that makes me feel comfortable
- 18-25: 74%
- 26-40: 73%
- 41-55: 77%
- 56-75: 80%

Rewards me for loyalty
- 18-25: 70%
- 26-40: 73%
- 41-55: 80%
- 56-75: 74%

Treats me like an individual
- 18-25: 67%
- 26-40: 73%
- 41-55: 75%
- 56-75: 76%

Strives to develop a relationship
- 18-25: 55%
- 26-40: 68%
- 41-55: 77%
- 56-75: 68%

Surprises me with rewards I don't expect
- 18-25: 60%
- 26-40: 66%
- 41-55: 66%
- 56-75: 53%

Influences my life beyond the products and services that it provides
- 18-25: 62%
- 26-40: 64%
- 41-55: 57%
- 56-75: 42%

Makes me feel special, like a VIP
- 18-25: 55%
- 26-40: 63%
- 41-55: 62%
- 56-75: 43%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

Provides a consistent experience, regardless of where I interact with it
- 18-25: 72%
- 26-40: 82%
- 41-55: 87%
- 56-75: 92%

Rewards me for loyalty
- 18-25: 69%
- 26-40: 85%
- 41-55: 83%
- 56-75: 85%

Treats me like an individual
- 18-25: 71%
- 26-40: 78%
- 41-55: 86%
- 56-75: 82%

Uses my data in a way that makes me feel comfortable
- 18-25: 74%
- 26-40: 74%
- 41-55: 87%
- 56-75: 78%

Strives to develop a relationship
- 18-25: 62%
- 26-40: 77%
- 41-55: 83%
- 56-75: 78%

Makes me feel special, like a VIP
- 18-25: 64%
- 26-40: 76%
- 41-55: 83%
- 56-75: 65%

Surprises me with rewards I don't expect
- 18-25: 69%
- 26-40: 72%
- 41-55: 76%
- 56-75: 62%

Influences my life beyond the products and services that it provides
- 18-25: 69%
- 26-40: 75%
- 41-55: 79%
- 56-75: 46%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

Provides a consistent experience, regardless of where I interact with it
- 18-25: 75%
- 26-40: 79%
- 41-55: 81%
- 56-75: 84%

Rewards me for loyalty
- 18-25: 74%
- 26-40: 78%
- 41-55: 79%
- 56-75: 77%

Uses my data in a way that makes me feel comfortable
- 18-25: 76%
- 26-40: 72%
- 41-55: 76%
- 56-75: 75%

Treats me like an individual
- 18-25: 71%
- 26-40: 72%
- 41-55: 75%
- 56-75: 79%

Strives to develop a relationship
- 18-25: 67%
- 26-40: 71%
- 41-55: 75%
- 56-75: 72%

Surprises me with rewards I don't expect
- 18-25: 68%
- 26-40: 67%
- 41-55: 66%
- 56-75: 56%

Makes me feel special, like a VIP
- 18-25: 58%
- 26-40: 60%
- 41-55: 62%
- 56-75: 52%

Influences my life beyond the products and services that it provides
- 18-25: 62%
- 26-40: 63%
- 41-55: 59%
- 56-75: 43%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Thinking of how your FAVORITE brands communicate with you across channels such as email, sms, websites, apps or in-store, which best describes the relationship?

Australia

They communicate as and when necessary, e.g. to tell me about offers or update me on transactions
- 48%
- 47%
- 62%
- 71%

We communicate with each other like we have a good relationship and they understand me
- 24%
- 24%
- 13%
- 12%

They treat me like I am a VIP
- 19%
- 21%
- 16%
- 7%

I don't hear from them unless I get in touch because I have a problem or need information
- 9%
- 7%
- 8%
- 10%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

France

They communicate as and when necessary, e.g. to tell me about offers or update me on transactions
- 58%
- 55%
- 61%
- 64%

We communicate with each other like we have a good relationship and they understand me
- 24%
- 21%
- 17%
- 16%

They treat me like I am a VIP
- 8%
- 21%
- 16%
- 8%

I don't hear from them unless I get in touch because I have a problem or need information
- 10%
- 4%
- 6%
- 12%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Japan

They communicate as and when necessary, e.g. to tell me about offers or update me on transactions
- 36%
- 39%
- 42%
- 41%

We communicate with each other like we have a good relationship and they understand me
- 37%
- 33%
- 20%
- 14%

I don't hear from them unless I get in touch because I have a problem or need information
- 14%
- 17%
- 31%
- 42%

They treat me like I am a VIP
- 13%
- 11%
- 7%
- 4%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Spain

They communicate as and when necessary, e.g. to tell me about offers or update me on transactions
- 53%
- 53%
- 61%
- 58%

We communicate with each other like we have a good relationship and they understand me
- 28%
- 24%
- 21%
- 23%

They treat me like I am a VIP
- 14%
- 15%
- 13%
- 11%

I don't hear from them unless I get in touch because I have a problem or need information
- 5%
- 8%
- 5%
- 8%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

UK

They communicate as and when necessary, e.g. to tell me about offers or update me on transactions
- 44%
- 40%
- 52%
- 68%

We communicate with each other like we have a good relationship and they understand me
- 33%
- 33%
- 23%
- 16%

They treat me like I am a VIP
- 15%
- 20%
- 14%
- 6%

I don't hear from them unless I get in touch because I have a problem or need information
- 7%
- 6%
- 12%
- 11%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

They communicate as and when necessary, e.g. to tell me about offers or update me on transactions
- 38%
- 29%
- 38%
- 63%

We communicate with each other like we have a good relationship and they understand me
- 33%
- 37%
- 23%
- 24%

They treat me like I am a VIP
- 22%
- 31%
- 30%
- 10%

I don't hear from them unless I get in touch because I have a problem or need information
- 8%
- 4%
- 9%
- 11%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

They communicate as and when necessary, e.g. to tell me about offers or update me on transactions
- 46%
- 45%
- 52%
- 62%

We communicate with each other like we have a good relationship and they understand me
- 30%
- 28%
- 20%
- 16%

They treat me like I am a VIP
- 16%
- 20%
- 16%
- 8%

I don't hear from them unless I get in touch because I have a problem or need information
- 9%
- 7%
- 12%
- 14%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Thinking about all the brands that have communicated with you regularly in the last six months, have you experienced any of the following frustrations?

Australia

Irrelevant content or offers
- 44%
- 56%
- 56%
- 68%

Messages that don't reflect my wants and needs (e.g. suggestions based on a one-off purchase I made for an older relative)
- 49%
- 47%
- 43%
- 44%

Messaging based on information about me that I hadn't shared directly with the brand
- 35%
- 36%
- 33%
- 38%

Messages that didn't recognize my shopping or loyalty card history (e.g. advertising products I'd already bought)
- 34%
- 38%
- 24%
- 33%

Communications delivered at the wrong time of day
- 18%
- 25%
- 24%
- 20%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

France

Irrelevant content or offers
- 36%
- 41%
- 31%
- 42%

Messages that don't reflect my wants and needs (e.g. suggestions based on a one-off purchase I made for an older relative)
- 37%
- 40%
- 31%
- 35%

Messaging based on information about me that I hadn't shared directly with the brand
- 29%
- 32%
- 43%
- 38%

Messages that didn't recognize my shopping or loyalty card history (e.g. advertising products I'd already bought)
- 29%
- 30%
- 34%
- 28%

Communications delivered at the wrong time of day
- 29%
- 23%
- 21%
- 26%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Japan

Irrelevant content or offers
- 39%
- 41%
- 55%
- 58%

Messages that don't reflect my wants and needs (e.g. suggestions based on a one-off purchase I made for an older relative)
- 39%
- 43%
- 28%
- 46%

Messaging based on information about me that I hadn't shared directly with the brand
- 21%
- 31%
- 30%
- 29%

Communications delivered at the wrong time of day
- 23%
- 30%
- 31%
- 21%

Messages that didn't recognize my shopping or loyalty card history (e.g. advertising products I'd already bought)
- 30%
- 24%
- 21%
- 24%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Spain

Irrelevant content or offers
- 32%
- 45%
- 48%
- 51%

Messages that don't reflect my wants and needs (e.g. suggestions based on a one-off purchase I made for an older relative)
- 42%
- 40%
- 35%
- 37%

Messaging based on information about me that I hadn't shared directly with the brand
- 47%
- 30%
- 32%
- 42%

Messages that didn't recognize my shopping or loyalty card history (e.g. advertising products I'd already bought)
- 29%
- 28%
- 37%
- 30%

Communications delivered at the wrong time of day
- 26%
- 27%
- 25%
- 25%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

UK

Irrelevant content or offers
- 50%
- 43%
- 56%
- 67%

Messages that don't reflect my wants and needs (e.g. suggestions based on a one-off purchase I made for an older relative)
- 43%
- 38%
- 36%
- 46%

Messaging based on information about me that I hadn't shared directly with the brand
- 31%
- 33%
- 37%
- 39%

Messages that didn't recognize my shopping or loyalty card history (e.g. advertising products I'd already bought)
- 30%
- 33%
- 22%
- 33%

Communications delivered at the wrong time of day
- 21%
- 25%
- 24%
- 14%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

Irrelevant content or offers
- 39%
- 48%
- 56%
- 71%

Messages that don't reflect my wants and needs (e.g. suggestions based on a one-off purchase I made for an older relative)
- 35%
- 48%
- 42%
- 45%

Messaging based on information about me that I hadn't shared directly with the brand
- 35%
- 38%
- 37%
- 44%

Messages that didn't recognize my shopping or loyalty card history (e.g. advertising products I'd already bought)
- 37%
- 41%
- 35%
- 26%

Communications delivered at the wrong time of day
- 27%
- 34%
- 25%
- 18%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

Irrelevant content or offers
- 40%
- 45%
- 50%
- 61%

Messages that don't reflect my wants and needs (e.g. suggestions based on a one-off purchase I made for an older relative)
- 42%
- 42%
- 36%
- 42%

Messaging based on information about me that I hadn't shared directly with the brand
- 34%
- 33%
- 35%
- 39%

Messages that didn't recognize my shopping or loyalty card history (e.g. advertising products I'd already bought)
- 32%
- 32%
- 29%
- 29%

Communications delivered at the wrong time of day
- 24%
- 27%
- 25%
- 20%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Thinking about the messages you get from brands you engage with (whether through email, apps or social media)... Do you see too many or too few messages about... (1-7)

Australia

18-25 Years old

Sale promotions
- Overwhelmed: 17%
- Too much: 30%
- About right: 45%
- More: 8%

Free delivery offers
- Overwhelmed: 10%
- Too much: 23%
- About right: 50%
- More: 18%

Treats especially for e.g. birthday offers
- Overwhelmed: 10%
- Too much: 19%
- About right: 55%
- More: 16%

VIP offers recognizing as a valued customer
- Overwhelmed: 16%
- Too much: 14%
- About right: 55%
- More: 15%

Loyalty programs/points
- Overwhelmed: 18%
- Too much: 18%
- About right: 54%
- More: 20%

Brand e.g. value, environmental activities
- Overwhelmed: 16%
- Too much: 23%
- About right: 47%
- More: 15%

Discount codes/money off coupons
- Overwhelmed: 15%
- Too much: 18%
- About right: 51%
- More: 16%

Legend: Overwhelmed | Too much | About right | More

26-40 Years old

Sale promotions
- Overwhelmed: 15%
- Too much: 26%
- About right: 48%
- More: 11%

Free delivery offers
- Overwhelmed: 9%
- Too much: 16%
- About right: 51%
- More: 24%

Treats especially for e.g. birthday offers
- Overwhelmed: 10%
- Too much: 13%
- About right: 53%
- More: 24%

VIP offers recognizing as a valued customer
- Overwhelmed: 11%
- Too much: 15%
- About right: 54%
- More: 19%

Loyalty programs/points
- Overwhelmed: 12%
- Too much: 14%
- About right: 57%
- More: 17%

Brand e.g. value, environmental activities
- Overwhelmed: 12%
- Too much: 22%
- About right: 50%
- More: 17%

Discount codes/money off coupons
- Overwhelmed: 10%
- Too much: 14%
- About right: 51%
- More: 25%

Legend: Overwhelmed | Too much | About right | More

41-55 Years old

Sale promotions
- Overwhelmed: 18%
- Too much: 25%
- About right: 52%
- More: 6%

Free delivery offers
- Overwhelmed: 7%
- Too much: 21%
- About right: 55%
- More: 17%

Treats especially for e.g. birthday offers
- Overwhelmed: 5%
- Too much: 17%
- About right: 58%
- More: 20%

VIP offers recognizing as a valued customer
- Overwhelmed: 8%
- Too much: 25%
- About right: 55%
- More: 12%

Loyalty programs/points
- Overwhelmed: 10%
- Too much: 17%
- About right: 54%
- More: 19%

Brand e.g. value, environmental activities
- Overwhelmed: 13%
- Too much: 20%
- About right: 54%
- More: 13%

Discount codes/money off coupons
- Overwhelmed: 8%
- Too much: 22%
- About right: 51%
- More: 19%

Legend: Overwhelmed | Too much | About right | More

56-75 Years old

Sale promotions
- Overwhelmed: 12%
- Too much: 25%
- About right: 57%
- More: 6%

Free delivery offers
- Overwhelmed: 5%
- Too much: 8%
- About right: 69%
- More: 18%

Treats especially for e.g. birthday offers
- Overwhelmed: 7%
- Too much: 12%
- About right: 69%
- More: 12%

VIP offers recognizing as a valued customer
- Overwhelmed: 7%
- Too much: 11%
- About right: 68%
- More: 14%

Loyalty programs/points
- Overwhelmed: 5%
- Too much: 9%
- About right: 75%
- More: 10%

Brand e.g. value, environmental activities
- Overwhelmed: 6%
- Too much: 23%
- About right: 61%
- More: 10%

Discount codes/money off coupons
- Overwhelmed: 5%
- Too much: 15%
- About right: 67%
- More: 12%

Legend: Overwhelmed | Too much | About right | More

Thinking about the messages you get from brands you engage with (whether through email, apps or social media)…
Do you see too many or too few messages about… (2-7)

France

18-25 Years old

Sale promotions
- Overwhelmed: 25%
- Too much: 37%
- About right: 29%
- More: 8%

Free delivery offers
- Overwhelmed: 20%
- Too much: 22%
- About right: 45%
- More: 12%

Treats especially for e.g. birthday offers
- Overwhelmed: 11%
- Too much: 21%
- About right: 49%
- More: 18%

VIP offers recognizing as a valued customer
- Overwhelmed: 18%
- Too much: 25%
- About right: 37%
- More: 19%

Loyalty programs/points
- Overwhelmed: 17%
- Too much: 28%
- About right: 36%
- More: 18%

Brand e.g. value, environmental activities
- Overwhelmed: 12%
- Too much: 19%
- About right: 53%
- More: 16%

Discount codes/money off coupons
- Overwhelmed: 16%
- Too much: 23%
- About right: 41%
- More: 19%

26-40 Years old

Sale promotions
- Overwhelmed: 19%
- Too much: 26%
- About right: 43%
- More: 12%

Free delivery offers
- Overwhelmed: 10%
- Too much: 18%
- About right: 52%
- More: 20%

Treats especially for e.g. birthday offers
- Overwhelmed: 11%
- Too much: 16%
- About right: 48%
- More: 25%

VIP offers recognizing as a valued customer
- Overwhelmed: 14%
- Too much: 19%
- About right: 47%
- More: 20%

Loyalty programs/points
- Overwhelmed: 12%
- Too much: 17%
- About right: 56%
- More: 15%

Brand e.g. value, environmental activities
- Overwhelmed: 14%
- Too much: 21%
- About right: 50%
- More: 15%

Discount codes/money off coupons
- Overwhelmed: 11%
- Too much: 18%
- About right: 48%
- More: 24%

41-55 Years old

Sale promotions
- Overwhelmed: 21%
- Too much: 28%
- About right: 40%
- More: 11%

Free delivery offers
- Overwhelmed: 8%
- Too much: 17%
- About right: 56%
- More: 19%

Treats especially for e.g. birthday offers
- Overwhelmed: 10%
- Too much: 19%
- About right: 53%
- More: 19%

VIP offers recognizing as a valued customer
- Overwhelmed: 11%
- Too much: 27%
- About right: 48%
- More: 14%

Loyalty programs/points
- Overwhelmed: 7%
- Too much: 17%
- About right: 60%
- More: 15%

Brand e.g. value, environmental activities
- Overwhelmed: 12%
- Too much: 29%
- About right: 48%
- More: 10%

Discount codes/money off coupons
- Overwhelmed: 12%
- Too much: 10%
- About right: 58%
- More: 21%

56-75 Years old

Sale promotions
- Overwhelmed: 12%
- Too much: 24%
- About right: 58%
- More: 7%

Free delivery offers
- Overwhelmed: 7%
- Too much: 11%
- About right: 67%
- More: 16%

Treats especially for e.g. birthday offers
- Overwhelmed: 11%
- Too much: 16%
- About right: 62%
- More: 12%

VIP offers recognizing as a valued customer
- Overwhelmed: 10%
- Too much: 20%
- About right: 58%
- More: 13%

Loyalty programs/points
- Overwhelmed: 7%
- Too much: 13%
- About right: 70%
- More: 10%

Brand e.g. value, environmental activities
- Overwhelmed: 8%
- Too much: 21%
- About right: 61%
- More: 9%

Discount codes/money off coupons
- Overwhelmed: 7%
- Too much: 12%
- About right: 71%
- More: 11%

Legend: Overwhelmed | Too much | About right | More

Thinking about the messages you get from brands you engage with (whether through email, apps or social media)... Do you see too many or too few messages about... (3-7)

Japan

18-25 Years old

Sale promotions
- Overwhelmed: 13%
- Too much: 33%
- About right: 49%
- More: 5%

Free delivery offers
- Overwhelmed: 10%
- Too much: 23%
- About right: 50%
- More: 18%

Treats especially for e.g. birthday offers
- Overwhelmed: 9%
- Too much: 16%
- About right: 64%
- More: 11%

VIP offers recognizing as a valued customer
- Overwhelmed: 13%
- Too much: 23%
- About right: 53%
- More: 11%

Loyalty programs/points
- Overwhelmed: 13%
- Too much: 22%
- About right: 58%
- More: 7%

Brand e.g. value, environmental activities
- Overwhelmed: 9%
- Too much: 19%
- About right: 60%
- More: 12%

Discount codes/money off coupons
- Overwhelmed: 11%
- Too much: 24%
- About right: 50%
- More: 15%

Overwhelmed · Too much · About right · More

26-40 Years old

Sale promotions
- Overwhelmed: 15%
- Too much: 36%
- About right: 44%
- More: 6%

Free delivery offers
- Overwhelmed: 10%
- Too much: 18%
- About right: 53%
- More: 19%

Treats especially for e.g. birthday offers
- Overwhelmed: 7%
- Too much: 14%
- About right: 67%
- More: 12%

VIP offers recognizing as a valued customer
- Overwhelmed: 7%
- Too much: 20%
- About right: 58%
- More: 15%

Loyalty programs/points
- Overwhelmed: 8%
- Too much: 21%
- About right: 57%
- More: 14%

Brand e.g. value, environmental activities
- Overwhelmed: 10%
- Too much: 22%
- About right: 57%
- More: 11%

Discount codes/money off coupons
- Overwhelmed: 10%
- Too much: 18%
- About right: 45%
- More: 27%

Overwhelmed · Too much · About right · More

41-55 Years old

Sale promotions
- Overwhelmed: 11%
- Too much: 44%
- About right: 43%
- More: 2%

Free delivery offers
- Overwhelmed: 7%
- Too much: 16%
- About right: 58%
- More: 20%

Treats especially for e.g. birthday offers
- Overwhelmed: 2%
- Too much: 13%
- About right: 71%
- More: 14%

VIP offers recognizing as a valued customer
- Overwhelmed: 2%
- Too much: 17%
- About right: 63%
- More: 17%

Loyalty programs/points
- Overwhelmed: 5%
- Too much: 24%
- About right: 54%
- More: 17%

Brand e.g. value, environmental activities
- Overwhelmed: 4%
- Too much: 26%
- About right: 57%
- More: 12%

Discount codes/money off coupons
- Overwhelmed: 7%
- Too much: 17%
- About right: 44%
- More: 32%

Overwhelmed · Too much · About right · More

56-75 Years old

Sale promotions
- Overwhelmed: 11%
- Too much: 50%
- About right: 37%
- More: 3%

Free delivery offers
- Overwhelmed: 3%
- Too much: 20%
- About right: 54%
- More: 23%

Treats especially for e.g. birthday offers
- Overwhelmed: 3%
- Too much: 14%
- About right: 75%
- More: 9%

VIP offers recognizing as a valued customer
- Overwhelmed: 4%
- Too much: 29%
- About right: 57%
- More: 10%

Loyalty programs/points
- Overwhelmed: 4%
- Too much: 25%
- About right: 55%
- More: 16%

Brand e.g. value, environmental activities
- Overwhelmed: 5%
- Too much: 25%
- About right: 55%
- More: 15%

Discount codes/money off coupons
- Overwhelmed: 3%
- Too much: 32%
- About right: 41%
- More: 24%

Overwhelmed · Too much · About right · More

Thinking about the messages you get from brands you engage with (whether through email, apps or social media)... Do you see too many or too few messages about... (4-7)

Spain

18-25 Years old

Sale promotions
- 21%
- 34%
- 36%
- 9%

Free delivery offers
- 15%
- 28%
- 46%
- 12%

Treats especially for e.g. birthday offers
- 15%
- 30%
- 41%
- 14%

VIP offers recognizing as a valued customer
- 19%
- 20%
- 47%
- 14%

Loyalty programs/points
- 17%
- 26%
- 42%
- 14%

Brand e.g. value, environmental activities
- 19%
- 26%
- 43%
- 12%

Discount codes/money off coupons
- 18%
- 23%
- 46%
- 13%

Overwhelmed · Too much · About right · More

26-40 Years old

Sale promotions
- 17%
- 33%
- 42%
- 8%

Free delivery offers
- 13%
- 24%
- 49%
- 13%

Treats especially for e.g. birthday offers
- 13%
- 23%
- 50%
- 14%

VIP offers recognizing as a valued customer
- 12%
- 24%
- 49%
- 14%

Loyalty programs/points
- 14%
- 26%
- 50%
- 10%

Brand e.g. value, environmental activities
- 12%
- 28%
- 52%
- 9%

Discount codes/money off coupons
- 12%
- 24%
- 49%
- 15%

Overwhelmed · Too much · About right · More

41-55 Years old

Sale promotions
- 16%
- 37%
- 42%
- 5%

Free delivery offers
- 10%
- 24%
- 56%
- 9%

Treats especially for e.g. birthday offers
- 9%
- 23%
- 62%
- 6%

VIP offers recognizing as a valued customer
- 12%
- 20%
- 55%
- 14%

Loyalty programs/points
- 5%
- 24%
- 61%
- 10%

Brand e.g. value, environmental activities
- 11%
- 27%
- 56%
- 6%

Discount codes/money off coupons
- 12%
- 22%
- 54%
- 12%

Overwhelmed · Too much · About right · More

56-75 Years old

Sale promotions
- 16%
- 24%
- 54%
- 7%

Free delivery offers
- 9%
- 19%
- 61%
- 11%

Treats especially for e.g. birthday offers
- 10%
- 18%
- 65%
- 9%

VIP offers recognizing as a valued customer
- 10%
- 18%
- 60%
- 11%

Loyalty programs/points
- 9%
- 15%
- 65%
- 11%

Brand e.g. value, environmental activities
- 9%
- 16%
- 61%
- 13%

Discount codes/money off coupons
- 7%
- 17%
- 63%
- 13%

Overwhelmed · Too much · About right · More

Thinking about the messages you get from brands you engage with (whether through email, apps or social media)...
Do you see too many or too few messages about... (5-7)

UK

18-25 Years old

	Overwhelmed	Too much	About right	More
Sale promotions	27%	31%	31%	11%
Free delivery offers	23%	21%	40%	16%
Treats especially for e.g. birthday offers	15%	29%	36%	20%
VIP offers recognizing as a valued customer	20%	21%	39%	19%
Loyalty programs/points	19%	22%	44%	16%
Brand e.g. value, environmental activities	25%	25%	40%	10%
Discount codes/money off coupons	12%	25%	40%	23%

26-40 Years old

	Overwhelmed	Too much	About right	More
Sale promotions	16%	30%	43%	10%
Free delivery offers	14%	22%	48%	16%
Treats especially for e.g. birthday offers	13%	17%	53%	16%
VIP offers recognizing as a valued customer	13%	23%	48%	17%
Loyalty programs/points	14%	21%	50%	15%
Brand e.g. value, environmental activities	15%	27%	46%	11%
Discount codes/money off coupons	13%	20%	47%	20%

41-55 Years old

	Overwhelmed	Too much	About right	More
Sale promotions	11%	26%	46%	17%
Free delivery offers	8%	16%	55%	20%
Treats especially for e.g. birthday offers	11%	14%	56%	19%
VIP offers recognizing as a valued customer	13%	19%	53%	16%
Loyalty programs/points	11%	13%	56%	20%
Brand e.g. value, environmental activities	13%	18%	57%	12%
Discount codes/money off coupons	13%	15%	52%	21%

56-75 Years old

	Overwhelmed	Too much	About right	More
Sale promotions	7%	27%	57%	9%
Free delivery offers	6%	12%	67%	15%
Treats especially for e.g. birthday offers	8%	11%	68%	14%
VIP offers recognizing as a valued customer	7%	16%	62%	15%
Loyalty programs/points	6%	13%	70%	11%
Brand e.g. value, environmental activities	6%	22%	63%	10%
Discount codes/money off coupons	5%	12%	63%	19%

Thinking about the messages you get from brands you engage with (whether through email, apps or social media)… Do you see too many or too few messages about… (6-7)

US

18-25 Years old

	Overwhelmed	Too much	About right	More
Sale promotions	23%	33%	32%	13%
Free delivery offers	19%	22%	39%	20%
Treats especially for e.g. birthday offers	14%	22%	42%	23%
VIP offers recognizing as a valued customer	16%	28%	40%	17%
Loyalty programs/points	15%	23%	47%	15%
Brand e.g. value, environmental activities	24%	25%	35%	16%
Discount codes/money off coupons	15%	26%	40%	19%

26-40 Years old

	Overwhelmed	Too much	About right	More
Sale promotions	18%	30%	41%	11%
Free delivery offers	18%	23%	46%	13%
Treats especially for e.g. birthday offers	20%	22%	42%	16%
VIP offers recognizing as a valued customer	18%	24%	43%	15%
Loyalty programs/points	19%	23%	46%	12%
Brand e.g. value, environmental activities	19%	24%	45%	13%
Discount codes/money off coupons	18%	25%	43%	14%

41-55 Years old

	Overwhelmed	Too much	About right	More
Sale promotions	18%	23%	48%	11%
Free delivery offers	16%	17%	54%	13%
Treats especially for e.g. birthday offers	18%	13%	53%	16%
VIP offers recognizing as a valued customer	16%	14%	55%	16%
Loyalty programs/points	14%	11%	60%	15%
Brand e.g. value, environmental activities	17%	19%	56%	8%
Discount codes/money off coupons	14%	18%	52%	16%

56-75 Years old

	Overwhelmed	Too much	About right	More
Sale promotions	13%	24%	52%	10%
Free delivery offers	8%	11%	64%	17%
Treats especially for e.g. birthday offers	8%	12%	60%	19%
VIP offers recognizing as a valued customer	8%	15%	62%	15%
Loyalty programs/points	8%	12%	66%	14%
Brand e.g. value, environmental activities	10%	21%	54%	14%
Discount codes/money off coupons	9%	14%	54%	23%

Thinking about the messages you get from brands you engage with (whether through email, apps or social media)... Do you see too many or too few messages about... (7-7)

Global Summary

18-25 Years old

Sale promotions
- Overwhelmed: 20%
- Too much: 33%
- About right: 38%
- More: 9%

Brand e.g. value, environmental activities
- Overwhelmed: 17%
- Too much: 23%
- About right: 47%
- More: 13%

VIP offers recognizing as a valued customer
- Overwhelmed: 17%
- Too much: 21%
- About right: 47%
- More: 15%

Loyalty programs/points
- Overwhelmed: 16%
- Too much: 23%
- About right: 48%
- More: 13%

Free delivery offers
- Overwhelmed: 15%
- Too much: 24%
- About right: 46%
- More: 16%

Discount codes/money off coupons
- Overwhelmed: 15%
- Too much: 23%
- About right: 46%
- More: 17%

Treats especially for e.g. birthday offers
- Overwhelmed: 15%
- Too much: 23%
- About right: 49%
- More: 16%

Legend: Overwhelmed | Too much | About right | More

26-40 Years old

Sale promotions
- Overwhelmed: 17%
- Too much: 30%
- About right: 44%
- More: 10%

Brand e.g. value, environmental activities
- Overwhelmed: 12%
- Too much: 20%
- About right: 50%
- More: 18%

Loyalty programs/points
- Overwhelmed: 12%
- Too much: 17%
- About right: 52%
- More: 19%

VIP offers recognizing as a valued customer
- Overwhelmed: 13%
- Too much: 21%
- About right: 50%
- More: 17%

Treats especially for e.g. birthday offers
- Overwhelmed: 13%
- Too much: 20%
- About right: 53%
- More: 14%

Free delivery offers
- Overwhelmed: 14%
- Too much: 24%
- About right: 50%
- More: 13%

Discount codes/money off coupons
- Overwhelmed: 12%
- Too much: 20%
- About right: 47%
- More: 21%

Legend: Overwhelmed | Too much | About right | More

41-55 Years old

Sale promotions
- Overwhelmed: 15%
- Too much: 31%
- About right: 45%
- More: 9%

Brand e.g. value, environmental activities
- Overwhelmed: 12%
- Too much: 24%
- About right: 55%
- More: 10%

Discount codes/money off coupons
- Overwhelmed: 11%
- Too much: 17%
- About right: 52%
- More: 20%

VIP offers recognizing as a valued customer
- Overwhelmed: 10%
- Too much: 20%
- About right: 55%
- More: 15%

Free delivery offers
- Overwhelmed: 9%
- Too much: 18%
- About right: 56%
- More: 16%

Treats especially for e.g. birthday offers
- Overwhelmed: 9%
- Too much: 16%
- About right: 59%
- More: 16%

Loyalty programs/points
- Overwhelmed: 9%
- Too much: 18%
- About right: 58%
- More: 16%

Legend: Overwhelmed | Too much | About right | More

56-75 Years old

Sale promotions
- Overwhelmed: 12%
- Too much: 28%
- About right: 53%
- More: 7%

VIP offers recognizing as a valued customer
- Overwhelmed: 8%
- Too much: 8%
- About right: 61%
- More: 13%

Treats especially for e.g. birthday offers
- Overwhelmed: 8%
- Too much: 14%
- About right: 66%
- More: 13%

Brand e.g. value, environmental activities
- Overwhelmed: 7%
- Too much: 22%
- About right: 59%
- More: 12%

Loyalty programs/points
- Overwhelmed: 6%
- Too much: 14%
- About right: 68%
- More: 12%

Free delivery offers
- Overwhelmed: 6%
- Too much: 13%
- About right: 64%
- More: 17%

Discount codes/money off coupons
- Overwhelmed: 6%
- Too much: 16%
- About right: 61%
- More: 17%

Legend: Overwhelmed | Too much | About right | More

Brands want to have loyal customers who prefer them to competitors. Thinking about how you've shopped and your personal brand loyalties in the last six months, are the following statements true? (True only)

Australia

I am loyal to some brands, but I'll buy from competitors if it's cheaper or more convenient
- 81%
- 81%
- 87%
- 89%

There are examples where I buy frequently from the same company, but I'm not loyal to that company
- 72%
- 70%
- 77%
- 71%

I'm definitely loyal to some brands where I'll pay more
- 70%
- 68%
- 61%
- 52%

I'm not loyal to any particular companies
- 23%
- 22%
- 26%
- 34%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

France

I am loyal to some brands, but I'll buy from competitors if it's cheaper or more convenient
- 80%
- 80%
- 76%
- 83%

There are examples where I buy frequently from the same company, but I'm not loyal to that company
- 74%
- 75%
- 73%
- 80%

I'm definitely loyal to some brands where I'll pay more
- 49%
- 38%
- 53%
- 32%

I'm not loyal to any particular companies
- 33%
- 46%
- 36%
- 51%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Japan

I am loyal to some brands, but I'll buy from competitors if it's cheaper or more convenient
- 64%
- 68%
- 72%
- 75%

I'm definitely loyal to some brands where I'll pay more
- 58%
- 65%
- 52%
- 36%

There are examples where I buy frequently from the same company, but I'm not loyal to that company
- 49%
- 44%
- 49%
- 49%

I'm not loyal to any particular companies
- 19%
- 21%
- 26%
- 31%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Spain

I am loyal to some brands, but I'll buy from competitors if it's cheaper or more convenient
- 68%
- 72%
- 77%
- 83%

There are examples where I buy frequently from the same company, but I'm not loyal to that company
- 65%
- 64%
- 73%
- 71%

I'm definitely loyal to some brands where I'll pay more
- 60%
- 57%
- 53%
- 40%

I'm not loyal to any particular companies
- 24%
- 28%
- 34%
- 43%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

UK

I am loyal to some brands, but I'll buy from competitors if it's cheaper or more convenient
- 66%
- 76%
- 52%
- 68%

There are examples where I buy frequently from the same company, but I'm not loyal to that company
- 63%
- 70%
- 68%
- 73%

I'm definitely loyal to some brands where I'll pay more
- 66%
- 65%
- 65%
- 53%

I'm not loyal to any particular companies
- 21%
- 22%
- 20%
- 35%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

I'm definitely loyal to some brands where I'll pay more
- 80%
- 84%
- 79%
- 62%

I am loyal to some brands, but I'll buy from competitors if it's cheaper or more convenient
- 66%
- 71%
- 74%
- 85%

There are examples where I buy frequently from the same company, but I'm not loyal to that company
- 65%
- 66%
- 61%
- 63%

I'm not loyal to any particular companies
- 15%
- 12%
- 14%
- 22%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

I am loyal to some brands, but I'll buy from competitors if it's cheaper or more convenient
- 71%
- 75%
- 77%
- 85%

There are examples where I buy frequently from the same company, but I'm not loyal to that company
- 65%
- 66%
- 67%
- 70%

I'm definitely loyal to some brands where I'll pay more
- 64%
- 60%
- 61%
- 47%

I'm not loyal to any particular companies
- 23%
- 27%
- 26%
- 36%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Thinking about the brands you are most loyal to, what are the top THREE things that make you loyal to certain brands? (1-2)

Australia

Category	18-25	26-40	41-55	56-75
They have great products/services	55%	54%	71%	60%
They're very convenient to use	38%	35%	29%	43%
They feel safe buying from	36%	38%	34%	39%
They have great customer service and support	35%	40%	45%	44%
I like their loyalty program, and they provide extra value to me to stay loyal	33%	39%	38%	45%
The brand aligns with my personal values and beliefs e.g. on environmental or political issues	26%	21%	18%	15%
I trust them to treat my data with respect	19%	19%	18%	26%
They seem to understand what I need	17%	18%	14%	11%
They work hard to build a relationship with me	14%	11%	13%	7%

France

Category	18-25	26-40	41-55	56-75
They have great products/services	53%	49%	56%	61%
They feel safe buying from	54%	49%	53%	49%
I like their loyalty program, and they provide extra value to me to stay loyal	35%	47%	36%	38%
They have great customer service and support	25%	29%	33%	46%
I trust them to treat my data with respect	20%	19%	25%	25%
They seem to understand what I need	22%	24%	17%	18%
The brand aligns with my personal values and beliefs e.g. on environmental or political issues	20%	19%	20%	15%
They're very convenient to use	14%	18%	17%	19%
They work hard to build a relationship with me	11%	10%	3%	5%

Japan

Category	18-25	26-40	41-55	56-75
They feel safe buying from	57%	48%	52%	61%
They have great products/services	45%	49%	61%	58%
They're very convenient to use	32%	33%	36%	39%
They seem to understand what I need	23%	35%	35%	39%
They have great customer service and support	20%	26%	26%	31%
I like their loyalty program, and they provide extra value to me to stay loyal	26%	26%	23%	16%
I trust them to treat my data with respect	26%	19%	16%	20%
The brand aligns with my personal values and beliefs e.g. on environmental or political issues	18%	21%	17%	16%
They work hard to build a relationship with me	13%	15%	5%	5%

Spain

Category	18-25	26-40	41-55	56-75
They have great products/services	49%	49%	64%	67%
They have great customer service and support	73%	47%	59%	54%
I trust them to treat my data with respect	33%	30%	37%	43%
I like their loyalty program, and they provide extra value to me to stay loyal	28%	31%	31%	32%
They feel safe buying from	30%	26%	22%	26%
They seem to understand what I need	26%	24%	16%	22%
The brand aligns with my personal values and beliefs e.g. on environmental or political issues	25%	24%	20%	12%
They're very convenient to use	17%	21%	22%	15%
They work hard to build a relationship with me	16%	16%	8%	9%

Legend: 18-25 Years old · 26-40 Years old · 41-55 Years old · 56-75 Years old

Thinking about the brands you are most loyal to, what are the top THREE things that make you loyal to certain brands? (2-2)

UK

They have great products/services
- 50%
- 48%
- 47%
- 67%

They're very convenient to use
- 42%
- 40%
- 48%
- 46%

They feel safe buying from
- 34%
- 35%
- 34%
- 46%

They have great customer service and support
- 27%
- 31%
- 32%
- 42%

I like their loyalty program, and they provide extra value to me to stay loyal
- 33%
- 27%
- 29%
- 23%

The brand aligns with my personal values and beliefs e.g. on environmental or political issues
- 23%
- 21%
- 16%
- 13%

I trust them to treat my data with respect
- 21%
- 21%
- 31%
- 24%

They seem to understand what I need
- 19%
- 23%
- 21%
- 15%

They work hard to build a relationship with me
- 14%
- 15%
- 11%
- 10%

18-25 Years old / 26-40 Years old / 41-55 Years old / 56-75 Years old

US

They have great products/services
- 39%
- 43%
- 55%
- 67%

They have great customer service and support
- 31%
- 36%
- 45%
- 49%

They're very convenient to use
- 37%
- 34%
- 34%
- 44%

I like their loyalty program, and they provide extra value to me to stay loyal
- 34%
- 38%
- 35%
- 42%

They feel safe buying from
- 32%
- 26%
- 31%
- 31%

I trust them to treat my data with respect
- 14%
- 26%
- 26%
- 24%

The brand aligns with my personal values and beliefs e.g. on environmental or political issues
- 28%
- 25%
- 19%
- 9%

They seem to understand what I need
- 21%
- 27%
- 21%
- 10%

They work hard to build a relationship with me
- 19%
- 15%
- 11%
- 7%

18-25 Years old / 26-40 Years old / 41-55 Years old / 56-75 Years old

Global summary

They have great products/services
- 49%
- 49%
- 58%
- 64%

They're very convenient to use
- 30%
- 29%
- 31%
- 35%

They feel safe buying from
- 39%
- 38%
- 37%
- 41%

They have great customer service and support
- 30%
- 35%
- 40%
- 45%

I like their loyalty program, and they provide extra value to me to stay loyal
- 31%
- 36%
- 32%
- 35%

The brand aligns with my personal values and beliefs e.g. on environmental or political issues
- 24%
- 22%
- 19%
- 13%

I trust them to treat my data with respect
- 23%
- 22%
- 26%
- 27%

They seem to understand what I need
- 22%
- 25%
- 20%
- 17%

They work hard to build a relationship with me
- 15%
- 14%
- 8%
- 7%

18-25 Years old / 26-40 Years old / 41-55 Years old / 56-75 Years old

You said you sometimes "Buy frequently from the same company, but don't feel loyal to that company."
What would make you feel closer to that brand? (1-2)

Australia

Provide extra value to me to stay loyal e.g. a better loyalty programme
- 45%
- 51%
- 55%
- 62%

Better products/services
- 36%
- 33%
- 37%
- 33%

Better customer service and support
- 34%
- 29%
- 25%
- 27%

More convenient to use
- 31%
- 26%
- 16%
- 29%

Understand what I need better
- 18%
- 17%
- 23%
- 13%

Align with my personal values and beliefs e.g. on environmental or political issues
- 24%
- 21%
- 11%
- 14%

Work harder to build a relationship with me
- 14%
- 22%
- 16%
- 17%

Feel safer to buy from
- 23%
- 15%
- 9%
- 15%

Treat my data with more respect
- 12%
- 15%
- 9%
- 14%

18-25 Years old / 26-40 Years old / 41-55 Years old / 56-75 Years old

France

Better products/services
- 45%
- 39%
- 41%
- 43%

Provide extra value to me to stay loyal e.g. a better loyalty programme
- 28%
- 41%
- 39%
- 39%

Feel safer to buy from
- 19%
- 24%
- 33%
- 28%

Understand what I need better
- 36%
- 21%
- 23%
- 23%

More convenient to use
- 14%
- 26%
- 22%
- 30%

Better customer service and support
- 25%
- 20%
- 17%
- 25%

Align with my personal values and beliefs e.g. on environmental or political issues
- 22%
- 16%
- 18%
- 11%

Treat my data with more respect
- 17%
- 18%
- 15%
- 15%

Work harder to build a relationship with me
- 16%
- 16%
- 13%
- 16%

18-25 Years old / 26-40 Years old / 41-55 Years old / 56-75 Years old

Japan

Better products/services
- 44%
- 33%
- 55%
- 50%

Feel safer to buy from
- 40%
- 44%
- 36%
- 46%

Understand what I need better
- 31%
- 35%
- 40%
- 31%

More convenient to use
- 23%
- 26%
- 21%
- 41%

Provide extra value to me to stay loyal e.g. a better loyalty programme
- 17%
- 36%
- 28%
- 11%

Better customer service and support
- 12%
- 15%
- 23%
- 35%

Treat my data with more respect
- 31%
- 25%
- 13%
- 13%

Align with my personal values and beliefs e.g. on environmental or political issues
- 8%
- 19%
- 23%
- 24%

Work harder to build a relationship with me
- 23%
- 20%
- 17%
- 6%

18-25 Years old / 26-40 Years old / 41-55 Years old / 56-75 Years old

Spain

Better products/services
- 31%
- 37%
- 55%
- 47%

Better customer service and support
- 23%
- 34%
- 42%
- 36%

More convenient to use
- 23%
- 33%
- 35%
- 36%

Feel safer to buy from
- 38%
- 25%
- 22%
- 34%

Provide extra value to me to stay loyal e.g. a better loyalty programme
- 27%
- 27%
- 22%
- 30%

Understand what I need better
- 24%
- 27%
- 26%
- 21%

Treat my data with more respect
- 22%
- 19%
- 24%
- 24%

Align with my personal values and beliefs e.g. on environmental or political issues
- 25%
- 18%
- 15%
- 13%

Work harder to build a relationship with me
- 15%
- 15%
- 21%
- 9%

18-25 Years old / 26-40 Years old / 41-55 Years old / 56-75 Years old

You said you sometimes "Buy frequently from the same company, but don't feel loyal to that company."
What would make you feel closer to that brand? (2-2)

UK

Provide extra value to me to stay loyal e.g. a better loyalty programme
- 43%
- 42%
- 49%
- 47%

Better products/services
- 26%
- 38%
- 22%
- 37%

More convenient to use
- 28%
- 34%
- 28%
- 24%

Better customer service and support
- 22%
- 19%
- 27%
- 21%

Understand what I need better
- 26%
- 23%
- 18%
- 16%

Feel safer to buy from
- 11%
- 26%
- 22%
- 20%

Align with my personal values and beliefs e.g. on environmental or political issues
- 24%
- 15%
- 18%
- 13%

Treat my data with more respect
- 26%
- 15%
- 11%
- 16%

Work harder to build a relationship with me
- 26%
- 21%
- 10%
- 10%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

Provide extra value to me to stay loyal e.g. a better loyalty programme
- 42%
- 37%
- 42%
- 57%

Better customer service and support
- 30%
- 36%
- 40%
- 29%

Better products/services
- 28%
- 31%
- 41%
- 34%

More convenient to use
- 34%
- 32%
- 24%
- 26%

Understand what I need better
- 28%
- 28%
- 24%
- 20%

Align with my personal values and beliefs e.g. on environmental or political issues
- 23%
- 24%
- 19%
- 12%

Work harder to build a relationship with me
- 21%
- 18%
- 23%
- 14%

Feel safer to buy from
- 21%
- 18%
- 23%
- 11%

Treat my data with more respect
- 11%
- 20%
- 18%
- 14%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

Provide extra value to me to stay loyal e.g. a better loyalty programme
- 34%
- 40%
- 40%
- 44%

Better products/services
- 35%
- 36%
- 41%
- 40%

More convenient to use
- 23%
- 29%
- 25%
- 29%

Better customer service and support
- 25%
- 25%
- 29%
- 28%

Feel safer to buy from
- 26%
- 23%
- 24%
- 24%

Understand what I need better
- 26%
- 24%
- 25%
- 19%

Align with my personal values and beliefs e.g. on environmental or political issues
- 23%
- 18%
- 17%
- 13%

Treat my data with more respect
- 19%
- 18%
- 15%
- 16%

Work harder to build a relationship with me
- 18%
- 18%
- 17%
- 13%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

In the past year, have you switched away from or become less loyal to any brand you previously liked to buy from?

Australia

AGE 18-25 — YES 37%, NO 63%
AGE 26-40 — YES 35%, NO 65%
AGE 41-55 — YES 28%, NO 72%
AGE 56-75 — YES 21%, NO 79%

France

AGE 18-25 — YES 42%, NO 58%
AGE 26-40 — YES 38%, NO 62%
AGE 41-55 — YES 34%, NO 66%
AGE 56-75 — YES 25%, NO 75%

Japan

AGE 18-25 — YES 29%, NO 71%
AGE 26-40 — YES 28%, NO 73%
AGE 41-55 — YES 18%, NO 82%
AGE 56-75 — YES 19%, NO 81%

Spain

AGE 18-25 — YES 47%, NO 53%
AGE 26-40 — YES 47%, NO 53%
AGE 41-55 — YES 31%, NO 69%
AGE 56-75 — YES 28%, NO 72%

UK

AGE 18-25 — YES 37%, NO 63%
AGE 26-40 — YES 31%, NO 69%
AGE 41-55 — YES 21%, NO 79%
AGE 56-75 — YES 20%, NO 80%

US

AGE 18-25 — YES 28%, NO 72%
AGE 26-40 — YES 40%, NO 60%
AGE 41-55 — YES 25%, NO 75%
AGE 56-75 — YES 22%, NO 78%

Global summary

AGE 18-25 — YES 37%, NO 63%
AGE 26-40 — YES 37%, NO 63%
AGE 41-55 — YES 26%, NO 74%
AGE 56-75 — YES 22%, NO 78%

You said you have switched away or become less loyal to a brand you previously liked. What were the reasons for this decision? (1-2)

Australia

Other brands are cheaper
- 33%
- 27%
- 37%
- 31%

Other brands have better offers/promotions
- 32%
- 24%
- 23%
- 42%

Lack of availability
- 30%
- 24%
- 13%
- 33%

Lack of choice/range
- 19%
- 18%
- 37%
- 21%

I didn't feel valued as a customer
- 12%
- 17%
- 23%
- 31%

Issues with quality
- 30%
- 33%
- 13%
- 13%

Customer service/support issues
- 16%
- 28%
- 23%
- 19%

Other brands have better buying options (e.g. In-app ordering click and collect, home delivery)
- 35%
- 27%
- 10%
- 13%

Brand's stance on social/political/environmental issues
- 18%
- 25%
- 17%
- 6%

Other (please specify)
- 5%
- 7%
- 3%
- 15%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

France

Other brands have better offers/promotions
- 34%
- 36%
- 27%
- 37%

Lack of choice/range
- 34%
- 31%
- 36%
- 23%

Issues with quality
- 31%
- 26%
- 30%
- 35%

Other brands are cheaper
- 20%
- 29%
- 16%
- 35%

Other brands have better buying options (e.g. In-app ordering click and collect, home delivery)
- 26%
- 25%
- 18%
- 16%

Lack of availability
- 20%
- 14%
- 18%
- 28%

I didn't feel valued as a customer
- 23%
- 16%
- 18%
- 18%

Brand's stance on social/political/environmental issues
- 17%
- 18%
- 9%
- 14%

Customer service/support issues
- 3%
- 14%
- 20%
- 14%

Other (please specify)
- 0%
- 6%
- 5%
- 2%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Japan

Other brands are cheaper
- 29%
- 30%
- 40%
- 39%

Other brands have better offers/promotions
- 21%
- 30%
- 36%
- 32%

Issues with quality
- 11%
- 28%
- 28%
- 39%

Lack of choice/range
- 24%
- 26%
- 36%
- 18%

Customer service/support issues
- 11%
- 32%
- 24%
- 36%

Other brands have better buying options (e.g. In-app ordering click and collect, home delivery)
- 29%
- 21%
- 28%
- 21%

Lack of availability
- 18%
- 30%
- 32%
- 7%

I didn't feel valued as a customer
- 3%
- 28%
- 20%
- 29%

Brand's stance on social/political/environmental issues
- 18%
- 22%
- 8%
- 4%

Other (please specify)
- 0%
- 4%
- 12%
- 11%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Spain

Other brands have better offers/promotions
- 39%
- 36%
- 38%
- 45%

Other brands are cheaper
- 37%
- 39%
- 25%
- 36%

Other brands have better buying options (e.g. In-app ordering click and collect, home delivery)
- 34%
- 32%
- 25%
- 36%

Issues with quality
- 20%
- 25%
- 30%
- 32%

Lack of availability
- 32%
- 31%
- 18%
- 26%

Customer service/support issues
- 24%
- 25%
- 23%
- 32%

I didn't feel valued as a customer
- 14%
- 23%
- 20%
- 19%

Lack of choice/range
- 20%
- 22%
- 20%
- 6%

Brand's stance on social/political/environmental issues
- 21%
- 14%
- 18%
- 11%

Other (please specify)
- 1%
- 1%
- 3%
- 9%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

You said you have switched away or become less loyal to a brand you previously liked.
What were the reasons for this decision? (2-2)

UK

Other brands are cheaper
- 41%
- 23%
- 32%
- 41%

I didn't feel valued as a customer
- 28%
- 26%
- 29%
- 43%

Lack of choice/range
- 31%
- 27%
- 36%
- 13%

Issues with quality
- 28%
- 27%
- 25%
- 24%

Other brands have better buying options (e.g. In-app ordering click and collect, home delivery)
- 38%
- 35%
- 21%
- 4%

Customer service/ support issues
- 19%
- 25%
- 14%
- 37%

Lack of availability
- 13%
- 29%
- 29%
- 20%

Other brands have better offers/promotions
- 16%
- 20%
- 21%
- 28%

Brand's stance on social/political/ environmental issues
- 31%
- 21%
- 18%
- 15%

Other (please specify)
- 0%
- 0%
- 0%
- 0%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

Issues with quality
- 36%
- 40%
- 38%
- 21%

Customer service/ support issues
- 21%
- 36%
- 38%
- 29%

Other brands are cheaper
- 29%
- 30%
- 27%
- 25%

Brand's stance on social/political/ environmental issues
- 21%
- 37%
- 32%
- 21%

Other brands have better buying options (e.g. In-app ordering click and collect, home delivery)
- 29%
- 28%
- 30%
- 21%

Other brands have better offers/promotions
- 25%
- 25%
- 19%
- 30%

Lack of availability
- 21%
- 37%
- 27%
- 15%

Lack of choice/range
- 25%
- 28%
- 30%
- 17%

I didn't feel valued as a customer
- 18%
- 18%
- 24%
- 17%

Other (please specify)
- 0%
- 1%
- 0%
- 23%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

Other brands are cheaper
- 32%
- 30%
- 28%
- 34%

Other brands have better offers/promotions
- 30%
- 30%
- 29%
- 35%

Issues with quality
- 25%
- 30%
- 28%
- 26%

Other brands have better buying options (e.g. In-app ordering click and collect, home delivery)
- 32%
- 28%
- 22%
- 18%

Lack of choice/range
- 24%
- 26%
- 32%
- 16%

Lack of availability
- 24%
- 26%
- 22%
- 22%

Customer service/ support issues
- 16%
- 25%
- 24%
- 24%

I didn't feel valued as a customer
- 15%
- 22%
- 22%
- 25%

Brand's stance on social/political/ environmental issues
- 21%
- 22%
- 17%
- 12%

Other (please specify)
- 2%
- 3%
- 4%
- 12%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Are you more or less likely to engage in brand loyalty programs this year than last year?

Australia

I'm no more or less likely to take part in a loyalty program than I was last year
- 48%
- 43%
- 53%
- 71%

I'm more likely to take part in a loyalty program than I was last year
- 44%
- 50%
- 42%
- 23%

I'm less likely to take part in a loyalty program than I was last year
- 8%
- 7%
- 5%
- 6%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

France

I'm no more or less likely to take part in a loyalty program than I was last year
- 49%
- 43%
- 54%
- 68%

I'm more likely to take part in a loyalty program than I was last year
- 41%
- 49%
- 40%
- 26%

I'm less likely to take part in a loyalty program than I was last year
- 10%
- 7%
- 6%
- 6%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Japan

I'm no more or less likely to take part in a loyalty program than I was last year
- 52%
- 55%
- 61%
- 70%

I'm more likely to take part in a loyalty program than I was last year
- 27%
- 28%
- 17%
- 9%

I'm less likely to take part in a loyalty program than I was last year
- 21%
- 17%
- 22%
- 21%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Spain

I'm no more or less likely to take part in a loyalty program than I was last year
- 49%
- 45%
- 47%
- 58%

I'm more likely to take part in a loyalty program than I was last year
- 40%
- 47%
- 49%
- 38%

I'm less likely to take part in a loyalty program than I was last year
- 12%
- 8%
- 4%
- 4%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

UK

I'm no more or less likely to take part in a loyalty program than I was last year
- 52%
- 47%
- 53%
- 65%

I'm more likely to take part in a loyalty program than I was last year
- 41%
- 48%
- 42%
- 31%

I'm less likely to take part in a loyalty program than I was last year
- 7%
- 5%
- 5%
- 4%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

I'm more likely to take part in a loyalty program than I was last year
- 52%
- 64%
- 61%
- 34%

I'm no more or less likely to take part in a loyalty program than I was last year
- 42%
- 32%
- 36%
- 62%

I'm less likely to take part in a loyalty program than I was last year
- 6%
- 4%
- 3%
- 4%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

I'm no more or less likely to take part in a loyalty program than I was last year
- 49%
- 44%
- 50%
- 66%

I'm more likely to take part in a loyalty program than I was last year
- 40%
- 48%
- 43%
- 28%

I'm less likely to take part in a loyalty program than I was last year
- 11%
- 8%
- 7%
- 6%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Thinking about rewards and loyalty programs, what should brands offer to keep you coming back? (1-2)

Australia

Discounts on their products/services
- 58%
- 69%
- 73%
- 85%

Points/rewards
- 53%
- 65%
- 68%
- 78%

Exclusive/early access to products/events/services
- 36%
- 35%
- 32%
- 25%

Communicate with me in the channels I prefer (e.g. via email, sms, apps, etc)
- 18%
- 16%
- 17%
- 24%

Recognition (e.g. badges, social posts, unique reward opportunities)
- 26%
- 21%
- 18%
- 10%

Suggest products/services based on my preferences
- 22%
- 21%
- 16%
- 14%

Contests/Sweepstakes
- 17%
- 16%
- 17%
- 13%

Community, i.e. I want to connect with other people who like the brand
- 16%
- 12%
- 6%
- 2%

Other (please specify)
- 1%
- 1%
- 0%
- 3%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

France

Discounts on their products/services
- 49%
- 61%
- 69%
- 76%

Points/rewards
- 49%
- 63%
- 61%
- 73%

Contests/Sweepstakes
- 36%
- 34%
- 21%
- 18%

Exclusive/early access to products/events/services
- 18%
- 24%
- 25%
- 25%

Suggest products/services based on my preferences
- 23%
- 17%
- 16%
- 25%

Recognition (e.g. badges, social posts, unique reward opportunities)
- 23%
- 17%
- 14%
- 10%

Communicate with me in the channels I prefer (e.g. via email, sms, apps, etc)
- 13%
- 17%
- 18%
- 13%

Community, i.e. I want to connect with other people who like the brand
- 26%
- 10%
- 10%
- 4%

Other (please specify)
- 1%
- 0%
- 0%
- 1%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Japan

Discounts on their products/services
- 49%
- 52%
- 65%
- 75%

Points/rewards
- 38%
- 38%
- 58%
- 54%

Suggest products/services based on my preferences
- 42%
- 43%
- 52%
- 50%

Exclusive/early access to products/events/services
- 27%
- 31%
- 31%
- 28%

Communicate with me in the channels I prefer (e.g. via email, sms, apps, etc)
- 21%
- 25%
- 19%
- 20%

Community, i.e. I want to connect with other people who like the brand
- 21%
- 21%
- 5%
- 3%

Contests/Sweepstakes
- 10%
- 10%
- 7%
- 8%

Recognition (e.g. badges, social posts, unique reward opportunities)
- 10%
- 10%
- 8%
- 2%

Other (please specify)
- 0%
- 0%
- 0%
- 2%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Spain

Discounts on their products/services
- 56%
- 54%
- 71%
- 82%

Points/rewards
- 50%
- 53%
- 63%
- 61%

Exclusive/early access to products/events/services
- 28%
- 32%
- 36%
- 22%

Contests/Sweepstakes
- 28%
- 30%
- 27%
- 23%

Suggest products/services based on my preferences
- 26%
- 25%
- 20%
- 31%

Recognition (e.g. badges, social posts, unique reward opportunities)
- 24%
- 26%
- 20%
- 11%

Communicate with me in the channels I prefer (e.g. via email, sms, apps, etc)
- 22%
- 19%
- 18%
- 19%

Community, i.e. I want to connect with other people who like the brand
- 15%
- 15%
- 10%
- 6%

Other (please specify)
- 1%
- 0%
- 0%
- 2%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

UK

Category	18-25	26-40	41-55	56-75
Discounts on their products/services	51%	57%	65%	80%
Points/rewards	53%	53%	62%	68%
Exclusive/early access to products/events/services	30%	29%	28%	30%
Suggest products/services based on my preferences	27%	23%	24%	15%
Communicate with me in the channels I prefer (e.g. via email, sms, apps, etc)	24%	20%	24%	22%
Recognition (e.g. badges, social posts, unique reward opportunities)	21%	23%	16%	13%
Contests/Sweepstakes	16%	16%	9%	9%
Community, i.e. I want to connect with other people who like the brand	17%	18%	10%	3%
Other (please specify)	0%	0%	0%	3%

US

Category	18-25	26-40	41-55	56-75
Discounts on their products/services	51%	48%	64%	78%
Points/rewards	51%	47%	58%	70%
Exclusive/early access to products/events/services	28%	34%	36%	37%
Suggest products/services based on my preferences	26%	29%	24%	21%
Communicate with me in the channels I prefer (e.g. via email, sms, apps, etc)	23%	26%	28%	19%
Recognition (e.g. badges, social posts, unique reward opportunities)	28%	28%	21%	4%
Contests/Sweepstakes	17%	24%	15%	13%
Community, i.e. I want to connect with other people who like the brand	18%	22%	10%	4%
Other (please specify)	0%	1%	1%	3%

Global summary

Category	18-25	26-40	41-55	56-75
Discounts on their products/services	53%	57%	68%	79%
Points/rewards	49%	54%	61%	69%
Exclusive/early access to products/events/services	29%	30%	31%	28%
Suggest products/services based on my preferences	27%	25%	26%	24%
Communicate with me in the channels I prefer (e.g. via email, sms, apps, etc)	20%	20%	21%	19%
Contests/Sweepstakes	20%	23%	16%	14%
Recognition (e.g. badges, social posts, unique reward opportunities)	22%	20%	16%	8%
Community, i.e. I want to connect with other people who like the brand	18%	16%	9%	4%
Other (please specify)	0%	0%	0%	2%

18-25 Years old   26-40 Years old   41-55 Years old   56-75 Years old

How would you feel if a brand/retailer interacted with you in the following ways, please indicate whether you feel it's creepy or cool? (Cool only) (1-2)

Australia

Category	18-25	26-40	41-55	56-75
Recommendations from a brand based on past purchases	82%	82%	81%	78%
An email reminder or advert about a product I'd abandoned in an online shopping cart	65%	61%	69%	54%
Personalized offers after staying on a brand's site for 2+ minutes e.g. via email, app, or website	65%	65%	53%	49%
Adverts on social media sites based on recent shopping experiences on other sites	63%	53%	44%	31%
A chatbot that has access to past purchase history to help with online shopping	50%	50%	47%	29%
Adverts that follow me across devices e.g. from phone to laptop	42%	32%	29%	22%
Adverts related to something I'd talked about near a smart device e.g. Amazon Echo, Google Nest speaker	41%	33%	23%	9%
Adverts from companies I don't know based on my location data	32%	28%	24%	10%

18-25 Years old, 26-40 Years old, 41-55 Years old, 56-75 Years old

France

Category	18-25	26-40	41-55	56-75
Recommendations from a brand based on past purchases	75%	82%	81%	82%
An email reminder or advert about a product I'd abandoned in an online shopping cart	63%	64%	65%	70%
Personalized offers after staying on a brand's site for 2+ minutes e.g. via email, app, or website	62%	63%	69%	60%
Adverts on social media sites based on recent shopping experiences on other sites	54%	57%	58%	37%
A chatbot that has access to past purchase history to help with online shopping	45%	47%	48%	47%
Adverts that follow me across devices e.g. from phone to laptop	44%	48%	51%	44%
Adverts related to something I'd talked about near a smart device e.g. Amazon Echo, Google Nest speaker	40%	43%	47%	40%
Adverts from companies I don't know based on my location data	41%	43%	40%	40%

18-25 Years old, 26-40 Years old, 41-55 Years old, 56-75 Years old

Japan

Category	18-25	26-40	41-55	56-75
Recommendations from a brand based on past purchases	73%	75%	75%	73%
An email reminder or advert about a product I'd abandoned in an online shopping cart	61%	71%	72%	59%
Adverts on social media sites based on recent shopping experiences on other sites	70%	65%	56%	55%
A chatbot that has access to past purchase history to help with online shopping	62%	68%	64%	52%
Personalized offers after staying on a brand's site for 2+ minutes e.g. via email, app, or website	61%	65%	61%	49%
Adverts related to something I'd talked about near a smart device e.g. Amazon Echo, Google Nest speaker	46%	45%	38%	25%
Adverts that follow me across devices e.g. from phone to laptop	37%	39%	23%	17%
Adverts from companies I don't know based on my location data	33%	33%	22%	11%

18-25 Years old, 26-40 Years old, 41-55 Years old, 56-75 Years old

Spain

Category	18-25	26-40	41-55	56-75
Recommendations from a brand based on past purchases	77%	77%	74%	79%
Personalized offers after staying on a brand's site for 2+ minutes e.g. via email, app, or website	63%	71%	70%	68%
An email reminder or advert about a product I'd abandoned in an online shopping cart	53%	61%	65%	66%
Adverts on social media sites based on recent shopping experiences on other sites	63%	63%	55%	55%
A chatbot that has access to past purchase history to help with online shopping	52%	55%	56%	58%
Adverts related to something I'd talked about near a smart device e.g. Amazon Echo, Google Nest speaker	54%	51%	50%	49%
Adverts from companies I don't know based on my location data	41%	39%	43%	38%
Adverts that follow me across devices e.g. from phone to laptop	43%	44%	41%	28%

18-25 Years old, 26-40 Years old, 41-55 Years old, 56-75 Years old

How would you feel if a brand/retailer interacted with you in the following ways, please indicate whether you feel it's creepy or cool? (Cool only) (2-2)

UK

Recommendations from a brand based on past purchases
- 18-25: 75%
- 26-40: 81%
- 41-55: 82%
- 56-75: 87%

An email reminder or advert about a product I'd abandoned in an online shopping cart
- 18-25: 67%
- 26-40: 64%
- 41-55: 72%
- 56-75: 67%

Personalized offers after staying on a brand's site for 2+ minutes e.g. via email, app, or website
- 18-25: 61%
- 26-40: 71%
- 41-55: 65%
- 56-75: 60%

Adverts on social media sites based on recent shopping experiences on other sites
- 18-25: 68%
- 26-40: 58%
- 41-55: 55%
- 56-75: 39%

A chatbot that has access to past purchase history to help with online shopping
- 18-25: 55%
- 26-40: 53%
- 41-55: 44%
- 56-75: 37%

Adverts from companies I don't know based on my location data
- 18-25: 44%
- 26-40: 43%
- 41-55: 34%
- 56-75: 20%

Adverts that follow me accross devices e.g. from phone to laptop
- 18-25: 34%
- 26-40: 45%
- 41-55: 35%
- 56-75: 26%

Adverts related to something I'd talked about near a smart device e.g. Amazon Echo, Google Nest speaker
- 18-25: 38%
- 26-40: 44%
- 41-55: 34%
- 56-75: 24%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

Recommendations from a brand based on past purchases
- 18-25: 83%
- 26-40: 74%
- 41-55: 85%
- 56-75: 87%

An email reminder or advert about a product I'd abandoned in an online shopping cart
- 18-25: 65%
- 26-40: 72%
- 41-55: 80%
- 56-75: 67%

Personalized offers after staying on a brand's site for 2+ minutes e.g. via email, app, or website
- 18-25: 67%
- 26-40: 66%
- 41-55: 72%
- 56-75: 57%

Adverts on social media sites based on recent shopping experiences on other sites
- 18-25: 68%
- 26-40: 67%
- 41-55: 66%
- 56-75: 33%

A chatbot that has access to past purchase history to help with online shopping
- 18-25: 52%
- 26-40: 58%
- 41-55: 67%
- 56-75: 38%

Adverts that follow me accross devices e.g. from phone to laptop
- 18-25: 42%
- 26-40: 55%
- 41-55: 54%
- 56-75: 28%

Adverts related to something I'd talked about near a smart device e.g. Amazon Echo, Google Nest speaker
- 18-25: 46%
- 26-40: 49%
- 41-55: 50%
- 56-75: 16%

Adverts from companies I don't know based on my location data
- 18-25: 34%
- 26-40: 44%
- 41-55: 42%
- 56-75: 16%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

Personalized offers after staying on a brand's site for 2+ minutes e.g. via email, app, or website
- 18-25: 63%
- 26-40: 67%
- 41-55: 65%
- 56-75: 58%

Adverts related to something I'd talked about near a smart device e.g. Amazon Echo, Google Nest speaker
- 18-25: 45%
- 26-40: 44%
- 41-55: 41%
- 56-75: 26%

Adverts that follow me accross devices e.g. from phone to laptop
- 18-25: 41%
- 26-40: 44%
- 41-55: 41%
- 56-75: 28%

Adverts on social media sites based on recent shopping experiences on other sites
- 18-25: 64%
- 26-40: 60%
- 41-55: 56%
- 56-75: 40%

An email reminder or advert about a product I'd abandoned in an online shopping cart
- 18-25: 61%
- 26-40: 65%
- 41-55: 70%
- 56-75: 64%

Recommendations from a brand based on past purchases
- 18-25: 78%
- 26-40: 79%
- 41-55: 80%
- 56-75: 82%

A chatbot that has access to past purchase history to help with online shopping
- 18-25: 53%
- 26-40: 54%
- 41-55: 54%
- 56-75: 42%

Adverts from companies I don't know based on my location data
- 18-25: 37%
- 26-40: 39%
- 41-55: 35%
- 56-75: 22%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Brands often provide something of value in exchange for personal data. Which types of benefits are the most valuable to you? (highly valuable only) (1-2)

Australia

Discounts or coupons
- 63%
- 66%
- 61%
- 55%

Loyalty points/rewards
- 60%
- 59%
- 57%
- 57%

A chance to win something
- 41%
- 39%
- 39%
- 31%

Early and/or exclusive access to offers
- 38%
- 40%
- 26%
- 30%

Community I.e. I want to connect with other people who like the brand
- 33%
- 20%
- 14%
- 7%

Unlocking content e.g. a news article
- 27%
- 19%
- 10%
- 9%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

France

Discounts or coupons
- 60%
- 64%
- 60%
- 58%

Loyalty points/rewards
- 56%
- 58%
- 51%
- 51%

A chance to win something
- 48%
- 47%
- 46%
- 25%

Early and/or exclusive access to offers
- 39%
- 36%
- 30%
- 21%

Unlocking content e.g. a news article
- 28%
- 20%
- 13%
- 7%

Community I.e. I want to connect with other people who like the brand
- 26%
- 18%
- 9%
- 5%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Japan

Discounts or coupons
- 57%
- 58%
- 50%
- 37%

Early and/or exclusive access to offers
- 43%
- 45%
- 38%
- 16%

Loyalty points/rewards
- 37%
- 41%
- 38%
- 25%

A chance to win something
- 41%
- 45%
- 32%
- 20%

Unlocking content e.g. a news article
- 26%
- 29%
- 22%
- 11%

Community I.e. I want to connect with other people who like the brand
- 28%
- 28%
- 12%
- 4%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Spain

Discounts or coupons
- 55%
- 62%
- 60%
- 63%

Loyalty points/rewards
- 61%
- 58%
- 54%
- 52%

A chance to win something
- 44%
- 47%
- 39%
- 41%

Early and/or exclusive access to offers
- 39%
- 48%
- 42%
- 36%

Unlocking content e.g. a news article
- 28%
- 28%
- 13%
- 17%

Community I.e. I want to connect with other people who like the brand
- 23%
- 20%
- 17%
- 15%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Brands often provide something of value in exchange for personal data. Which types of benefits are the most valuable to you? (highly valuable only) (2-2)

UK

Discounts or coupons
- 48%
- 53%
- 56%
- 56%

Loyalty points/rewards
- 49%
- 52%
- 57%
- 52%

Early and/or exclusive access to offers
- 48%
- 38%
- 38%
- 36%

A chance to win something
- 37%
- 36%
- 31%
- 27%

Community I.e. I want to connect with other people who like the brand
- 32%
- 23%
- 16%
- 10%

Unlocking content e.g. a news article
- 19%
- 24%
- 16%
- 12%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

Discounts or coupons
- 55%
- 61%
- 72%
- 67%

Loyalty points/rewards
- 48%
- 58%
- 67%
- 64%

Early and/or exclusive access to offers
- 50%
- 52%
- 56%
- 37%

A chance to win something
- 44%
- 51%
- 53%
- 26%

Unlocking content e.g. a news article
- 36%
- 38%
- 35%
- 8%

Community I.e. I want to connect with other people who like the brand
- 33%
- 35%
- 32%
- 8%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

Discounts or coupons
- 57%
- 61%
- 60%
- 57%

Loyalty points/rewards
- 53%
- 55%
- 54%
- 52%

Early and/or exclusive access to offers
- 42%
- 42%
- 39%
- 30%

A chance to win something
- 43%
- 44%
- 40%
- 28%

Unlocking content e.g. a news article
- 27%
- 25%
- 18%
- 10%

Community I.e. I want to connect with other people who like the brand
- 29%
- 23%
- 17%
- 8%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Are you comfortable sharing the following personal data with brands in exchange for better service or value? (Yes only)

Australia

My location
- 18-25: 41%
- 26-40: 45%
- 41-55: 29%
- 56-75: 49%

Data about me (e.g. clothing size, age, family, make-up)
- 18-25: 57%
- 26-40: 58%
- 41-55: 45%
- 56-75: 38%

Details about my identity (e.g. name and address)
- 18-25: 53%
- 26-40: 48%
- 41-55: 36%
- 56-75: 35%

My photograph
- 18-25: 25%
- 26-40: 23%
- 41-55: 15%
- 56-75: 10%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

France

Data about me (e.g. clothing size, age, family, make-up)
- 18-25: 60%
- 26-40: 58%
- 41-55: 58%
- 56-75: 50%

Details about my identity (e.g. name and address)
- 18-25: 45%
- 26-40: 40%
- 41-55: 29%
- 56-75: 39%

My location
- 18-25: 30%
- 26-40: 40%
- 41-55: 36%
- 56-75: 41%

My photograph
- 18-25: 23%
- 26-40: 19%
- 41-55: 15%
- 56-75: 14%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Japan

Data about me (e.g. clothing size, age, family, make-up)
- 18-25: 52%
- 26-40: 58%
- 41-55: 39%
- 56-75: 37%

Details about my identity (e.g. name and address)
- 18-25: 34%
- 26-40: 36%
- 41-55: 24%
- 56-75: 21%

My location
- 18-25: 20%
- 26-40: 25%
- 41-55: 20%
- 56-75: 19%

My photograph
- 18-25: 24%
- 26-40: 18%
- 41-55: 4%
- 56-75: 5%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Spain

Data about me (e.g. clothing size, age, family, make-up)
- 18-25: 61%
- 26-40: 60%
- 41-55: 59%
- 56-75: 51%

Details about my identity (e.g. name and address)
- 18-25: 47%
- 26-40: 43%
- 41-55: 43%
- 56-75: 36%

My location
- 18-25: 32%
- 26-40: 37%
- 41-55: 39%
- 56-75: 35%

My photograph
- 18-25: 29%
- 26-40: 33%
- 41-55: 14%
- 56-75: 25%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

UK

Data about me (e.g. clothing size, age, family, make-up)
- 18-25: 61%
- 26-40: 62%
- 41-55: 60%
- 56-75: 53%

Details about my identity (e.g. name and address)
- 18-25: 59%
- 26-40: 49%
- 41-55: 48%
- 56-75: 41%

My location
- 18-25: 45%
- 26-40: 50%
- 41-55: 44%
- 56-75: 54%

My photograph
- 18-25: 28%
- 26-40: 28%
- 41-55: 18%
- 56-75: 16%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

Data about me (e.g. clothing size, age, family, make-up)
- 18-25: 59%
- 26-40: 68%
- 41-55: 66%
- 56-75: 39%

My location
- 18-25: 40%
- 26-40: 56%
- 41-55: 56%
- 56-75: 41%

Details about my identity (e.g. name and address)
- 18-25: 40%
- 26-40: 55%
- 41-55: 51%
- 56-75: 33%

My photograph
- 18-25: 31%
- 26-40: 52%
- 41-55: 40%
- 56-75: 12%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

Data about me (e.g. clothing size, age, family, make-up)
- 18-25: 58%
- 26-40: 61%
- 41-55: 56%
- 56-75: 45%

Details about my identity (e.g. name and address)
- 18-25: 47%
- 26-40: 46%
- 41-55: 39%
- 56-75: 35%

My location
- 18-25: 35%
- 26-40: 43%
- 41-55: 38%
- 56-75: 42%

My photograph
- 18-25: 27%
- 26-40: 28%
- 41-55: 18%
- 56-75: 13%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Do you personally use the following on either your mobile, tablet or desktop PC? (1-2)

Australia

Cleaner e.g. cookies, registry
- 43%
- 40%
- 44%
- 49%

Ad blocker
- 44%
- 38%
- 46%
- 36%

Password manager to store encrypted passwords online
- 36%
- 39%
- 35%
- 41%

Privacy mode on pre-installed browser e.g. incognito
- 40%
- 42%
- 29%
- 20%

Paid-for/premium internet security software
- 22%
- 28%
- 29%
- 46%

Password generator e.g. to create 'un-hackable' passwords
- 27%
- 35%
- 24%
- 24%

Alternative privacy-centic search engine or internet browser e.g. DuckDuckGo, Brave
- 22%
- 24%
- 20%
- 9%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

France

Cleaner e.g. cookies, registry
- 43%
- 52%
- 52%
- 63%

Ad blocker
- 41%
- 35%
- 33%
- 48%

Password manager to store encrypted passwords online
- 35%
- 35%
- 34%
- 29%

Privacy mode on pre-installed browser e.g. incognito
- 41%
- 35%
- 25%
- 23%

Alternative privacy-centic search engine or internet browser e.g. DuckDuckGo, Brave
- 31%
- 20%
- 27%
- 20%

Password generator e.g. to create 'un-hackable' passwords
- 23%
- 24%
- 26%
- 21%

Paid-for/premium internet security software
- 13%
- 21%
- 23%
- 31%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Japan

Password manager to store encrypted passwords online
- 41%
- 40%
- 43%
- 33%

Paid-for/premium internet security software
- 23%
- 37%
- 39%
- 52%

Privacy mode on pre-installed browser e.g. incognito
- 38%
- 36%
- 37%
- 27%

Cleaner e.g. cookies, registry
- 26%
- 34%
- 30%
- 38%

Ad blocker
- 19%
- 33%
- 32%
- 30%

Password generator e.g. to create 'un-hackable' passwords
- 28%
- 31%
- 28%
- 22%

Alternative privacy-centic search engine or internet browser e.g. DuckDuckGo, Brave
- 20%
- 26%
- 17%
- 13%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Spain

Cleaner e.g. cookies, registry
- 46%
- 55%
- 55%
- 71%

Password manager to store encrypted passwords online
- 35%
- 36%
- 36%
- 47%

Ad blocker
- 31%
- 41%
- 31%
- 34%

Privacy mode on pre-installed browser e.g. incognito
- 31%
- 38%
- 34%
- 33%

Alternative privacy-centic search engine or internet browser e.g. DuckDuckGo, Brave
- 34%
- 30%
- 34%
- 26%

Password generator e.g. to create 'un-hackable' passwords
- 32%
- 29%
- 29%
- 27%

Paid-for/premium internet security software
- 25%
- 26%
- 27%
- 20%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Do you personally use the following on either your mobile, tablet or desktop PC? (2-2)

UK

Cleaner e.g. cookies, registry
- 29%
- 37%
- 39%
- 51%

Password manager to store encrypted passwords online
- 23%
- 40%
- 34%
- 44%

Ad blocker
- 30%
- 33%
- 38%
- 39%

Privacy mode on pre-installed browser e.g. incognito
- 47%
- 31%
- 23%
- 16%

Password generator e.g. to create 'un-hackable' passwords
- 32%
- 31%
- 24%
- 26%

Paid-for/premium internet security software
- 18%
- 24%
- 31%
- 33%

Alternative privacy-centic search engine or internet browser e.g. DuckDuckGo, Brave
- 16%
- 22%
- 20%
- 9%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

Cleaner e.g. cookies, registry
- 36%
- 37%
- 52%
- 50%

Password manager to store encrypted passwords online
- 36%
- 48%
- 48%
- 40%

Ad blocker
- 44%
- 35%
- 41%
- 42%

Privacy mode on pre-installed browser e.g. incognito
- 37%
- 38%
- 41%
- 26%

Paid-for/premium internet security software
- 20%
- 32%
- 34%
- 41%

Password generator e.g. to create 'un-hackable' passwords
- 28%
- 41%
- 34%
- 16%

Alternative privacy-centic search engine or internet browser e.g. DuckDuckGo, Brave
- 25%
- 33%
- 32%
- 16%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

Cleaner e.g. cookies, registry
- 38%
- 43%
- 46%
- 54%

Password manager to store encrypted passwords online
- 35%
- 39%
- 38%
- 39%

Ad blocker
- 35%
- 36%
- 36%
- 39%

Privacy mode on pre-installed browser e.g. incognito
- 38%
- 36%
- 32%
- 24%

Paid-for/premium internet security software
- 21%
- 27%
- 31%
- 37%

Password generator e.g. to create 'un-hackable' passwords
- 29%
- 31%
- 28%
- 22%

Alternative privacy-centic search engine or internet browser e.g. DuckDuckGo, Brave
- 25%
- 26%
- 23%
- 15%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Were you aware that cookies, which track visitor activity on websites, are being withdrawn soon?

Australia

No, I did not know this
- 67%
- 75%
- 78%
- 94%

Yes, I know they are being withdrawn
- 33%
- 25%
- 22%
- 6%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

France

No, I did not know this
- 66%
- 77%
- 70%
- 80%

Yes, I know they are being withdrawn
- 34%
- 23%
- 30%
- 20%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Japan

No, I did not know this
- 67%
- 65%
- 79%
- 82%

Yes, I know they are being withdrawn
- 33%
- 35%
- 21%
- 18%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Spain

No, I did not know this
- 61%
- 63%
- 73%
- 80%

Yes, I know they are being withdrawn
- 39%
- 37%
- 27%
- 20%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

UK

No, I did not know this
- 59%
- 63%
- 77%
- 87%

Yes, I know they are being withdrawn
- 41%
- 37%
- 23%
- 13%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

No, I did not know this
- 65%
- 42%
- 65%
- 85%

Yes, I know they are being withdrawn
- 35%
- 58%
- 35%
- 15%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

No, I did not know this
- 64%
- 66%
- 74%
- 85%

Yes, I know they are being withdrawn
- 36%
- 34%
- 26%
- 15%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

On balance, how do you feel about this?

Australia

I'm glad - I don't like being tracked
- 32%
- 33%
- 52%
- 64%

Optimistic - perhaps brands will come up with a way of sharing data that is fairer for everyone
- 38%
- 33%
- 39%
- 14%

Cynical - brands will just find a new way to track me
- 21%
- 15%
- 9%
- 7%

I'll miss them - they make for a better experience
- 9%
- 19%
- 0%
- 14%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

France

Optimistic - perhaps brands will come up with a way of sharing data that is fairer for everyone
- 42%
- 39%
- 40%
- 29%

I'm glad - I don't like being tracked
- 26%
- 39%
- 33%
- 45%

Cynical - brands will just find a new way to track me
- 6%
- 12%
- 16%
- 21%

I'll miss them - they make for a better experience
- 26%
- 9%
- 12%
- 6%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Japan

Cynical - brands will just find a new way to track me
- 21%
- 23%
- 45%
- 31%

Optimistic - perhaps brands will come up with a way of sharing data that is fairer for everyone
- 28%
- 31%
- 21%
- 21%

I'm glad - I don't like being tracked
- 12%
- 21%
- 24%
- 34%

I'll miss them - they make for a better experience
- 40%
- 25%
- 10%
- 14%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Spain

Optimistic - perhaps brands will come up with a way of sharing data that is fairer for everyone
- 36%
- 49%
- 53%
- 40%

I'm glad - I don't like being tracked
- 36%
- 29%
- 24%
- 34%

Cynical - brands will just find a new way to track me
- 24%
- 16%
- 11%
- 14%

I'll miss them - they make for a better experience
- 4%
- 6%
- 13%
- 11%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

UK

Optimistic - perhaps brands will come up with a way of sharing data that is fairer for everyone
- 60%
- 34%
- 35%
- 18%

I'm glad - I don't like being tracked
- 18%
- 28%
- 35%
- 48%

Cynical - brands will just find a new way to track me
- 18%
- 29%
- 24%
- 24%

I'll miss them - they make for a better experience
- 5%
- 9%
- 6%
- 9%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

I'm glad - I don't like being tracked
- 38%
- 20%
- 29%
- 54%

Optimistic - perhaps brands will come up with a way of sharing data that is fairer for everyone
- 33%
- 47%
- 31%
- 28%

Cynical - brands will just find a new way to track me
- 23%
- 15%
- 19%
- 15%

I'll miss them - they make for a better experience
- 8%
- 17%
- 21%
- 3%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

Optimistic - perhaps brands will come up with a way of sharing data that is fairer for everyone
- 39%
- 40%
- 37%
- 27%

I'm glad - I don't like being tracked
- 28%
- 27%
- 32%
- 45%

Cynical - brands will just find a new way to track me
- 20%
- 19%
- 20%
- 19%

I'll miss them - they make for a better experience
- 14%
- 14%
- 12%
- 8%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

How much do you trust brands in the following industries to use your data to provide personalized marketing and services? (Trust and distrust only) (1-3)

Australia

Trust

Industry	18-25	26-40	41-55	56-75
Food/Grocery shopping	47%	49%	48%	51%
Restaurants	39%	41%	35%	36%
Home improvement, garden and pets	37%	36%	37%	40%
Financial services/banking	32%	37%	41%	39%
Household appliances	35%	38%	33%	38%
Furniture/Household Goods	40%	38%	27%	33%
Travel/Hospitality	34%	36%	25%	35%
Beauty/Fashion	40%	34%	21%	28%
Sports/entertainment	32%	29%	27%	26%
Gaming/gambling	17%	17%	7%	6%

Distrust

Industry	18-25	26-40	41-55	56-75
Gaming/gambling	38%	46%	57%	67%
Financial services/banking	21%	21%	29%	30%
Sports/entertainment	11%	20%	20%	22%
Beauty/Fashion	12%	15%	21%	20%
Travel/Hospitality	11%	15%	22%	16%
Restaurants	10%	14%	18%	14%
Furniture/Household Goods	9%	13%	14%	14%
Food/Grocery shopping	10%	13%	13%	13%
Household appliances	8%	13%	14%	12%
Home improvement, garden and pets	8%	13%	15%	10%

France

Trust

Industry	18-25	26-40	41-55	56-75
Food/Grocery shopping	48%	53%	47%	42%
Home improvement, garden and pets	45%	49%	45%	41%
Household appliances	41%	47%	50%	40%
Restaurants	56%	47%	37%	36%
Furniture/Household Goods	50%	47%	42%	34%
Beauty/Fashion	54%	52%	37%	25%
Sports/entertainment	44%	40%	42%	34%
Travel/Hospitality	41%	34%	35%	36%
Financial services/banking	30%	28%	27%	39%
Gaming/gambling	23%	22%	21%	20%

Distrust

Industry	18-25	26-40	41-55	56-75
Gaming/gambling	43%	41%	45%	50%
Financial services/banking	29%	32%	39%	30%
Travel/Hospitality	18%	21%	21%	19%
Beauty/Fashion	9%	13%	22%	23%
Sports/entertainment	10%	15%	21%	19%
Restaurants	8%	13%	19%	15%
Furniture/Household Goods	7%	13%	18%	18%
Food/Grocery shopping	8%	12%	18%	16%
Household appliances	9%	12%	15%	15%
Home improvement, garden and pets	11%	12%	14%	10%

Legend: 18-25 Years old, 26-40 Years old, 41-55 Years old, 56-75 Years old

How much do you trust brands in the following industries to use your data to provide personalized marketing and services? (Trust and distrust only) (2-3)

Japan

Trust

Household appliances
- 55%
- 50%
- 36%
- 33%

Travel/Hospitality
- 49%
- 47%
- 35%
- 29%

Financial services/ banking
- 42%
- 38%
- 35%
- 39%

Furniture/Household Goods
- 54%
- 50%
- 26%
- 22%

Food/Grocery shopping
- 48%
- 44%
- 30%
- 23%

Restaurants
- 51%
- 48%
- 23%
- 19%

Home improvement, garden and pets
- 40%
- 43%
- 24%
- 28%

Sports/entertainment
- 44%
- 40%
- 24%
- 19%

Beauty/Fashion
- 46%
- 42%
- 22%
- 14%

Gaming/gambling
- 26%
- 31%
- 11%
- 7%

Distrust

Gaming/gambling
- 22%
- 28%
- 41%
- 63%

Financial services/ banking
- 20%
- 24%
- 21%
- 13%

Beauty/Fashion
- 16%
- 16%
- 19%
- 27%

Sports/entertainment
- 8%
- 15%
- 16%
- 18%

Restaurants
- 9%
- 13%
- 16%
- 16%

Travel/Hospitality
- 9%
- 16%
- 15%
- 11%

Food/Grocery shopping
- 11%
- 14%
- 13%
- 11%

Home improvement, garden and pets
- 13%
- 13%
- 11%
- 9%

Furniture/Household Goods
- 8%
- 10%
- 10%
- 10%

Household appliances
- 9%
- 9%
- 9%
- 9%

Legend: 18-25 Years old, 26-40 Years old, 41-55 Years old, 56-75 Years old

Spain

Trust

Food/Grocery shopping
- 47%
- 53%
- 55%
- 48%

Restaurants
- 51%
- 53%
- 53%
- 40%

Travel/Hospitality
- 48%
- 47%
- 48%
- 40%

Sports/entertainment
- 45%
- 47%
- 49%
- 37%

Beauty/Fashion
- 52%
- 46%
- 41%
- 36%

Household appliances
- 43%
- 44%
- 45%
- 42%

Furniture/Household Goods
- 43%
- 41%
- 42%
- 37%

Home improvement, garden and pets
- 42%
- 41%
- 38%
- 35%

Financial services/ banking
- 33%
- 34%
- 32%
- 35%

Gaming/gambling
- 25%
- 25%
- 26%
- 16%

Distrust

Gaming/gambling
- 37%
- 34%
- 35%
- 41%

Financial services/ banking
- 21%
- 26%
- 26%
- 26%

Travel/Hospitality
- 8%
- 12%
- 8%
- 13%

Beauty/Fashion
- 8%
- 8%
- 8%
- 13%

Home improvement, garden and pets
- 6%
- 11%
- 9%
- 10%

Furniture/Household Goods
- 8%
- 9%
- 8%
- 11%

Sports/entertainment
- 9%
- 8%
- 9%
- 10%

Household appliances
- 10%
- 9%
- 8%
- 8%

Restaurants
- 8%
- 7%
- 7%
- 11%

Food/Grocery shopping
- 10%
- 8%
- 6%
- 7%

Legend: 18-25 Years old, 26-40 Years old, 41-55 Years old, 56-75 Years old

How much do you trust brands in the following industries to use your data to provide personalized marketing and services? (Trust and distrust only) (3-3)

UK

Trust

Industry	18-25	26-40	41-55	56-75
Food/Grocery shopping	47%	49%	55%	55%
Financial services/banking	37%	42%	47%	45%
Restaurants	38%	40%	46%	34%
Home improvement, garden and pets	42%	36%	42%	36%
Travel/Hospitality	39%	36%	39%	34%
Household appliances	25%	38%	41%	36%
Furniture/Household Goods	34%	38%	40%	32%
Beauty/Fashion	42%	32%	40%	29%
Sports/entertainment	40%	35%	36%	27%
Gaming/gambling	22%	26%	28%	12%

Distrust

Industry	18-25	26-40	41-55	56-75
Gaming/gambling	31%	29%	37%	53%
Financial services/banking	24%	18%	17%	17%
Sports/entertainment	17%	13%	13%	20%
Travel/Hospitality	13%	13%	9%	15%
Household appliances	13%	10%	14%	11%
Beauty/Fashion	13%	11%	9%	15%
Restaurants	11%	11%	10%	14%
Home improvement, garden and pets	13%	11%	8%	13%
Furniture/Household Goods	9%	10%	10%	9%
Food/Grocery shopping	9%	8%	10%	7%

US

Trust

Industry	18-25	26-40	41-55	56-75
Food/Grocery shopping	48%	61%	61%	45%
Home improvement, garden and pets	46%	52%	59%	33%
Restaurants	38%	53%	50%	37%
Furniture/Household Goods	43%	51%	49%	29%
Household appliances	36%	51%	53%	28%
Financial services/banking	33%	50%	49%	35%
Beauty/Fashion	37%	54%	51%	22%
Travel/Hospitality	41%	49%	46%	22%
Sports/entertainment	33%	43%	40%	18%
Gaming/gambling	30%	37%	34%	10%

Distrust

Industry	18-25	26-40	41-55	56-75
Gaming/gambling	32%	21%	30%	59%
Sports/entertainment	21%	14%	16%	32%
Financial services/banking	18%	9%	15%	28%
Travel/Hospitality	11%	10%	17%	21%
Beauty/Fashion	19%	10%	6%	22%
Restaurants	15%	10%	8%	18%
Furniture/Household Goods	11%	8%	10%	15%
Home improvement, garden and pets	9%	9%	6%	17%
Household appliances	13%	5%	4%	15%
Food/Grocery shopping	11%	6%	4%	13%

Global Summary

Trust

Industry	18-25	26-40	41-55	56-75
Food/Grocery shopping	47%	52%	49%	45%
Restaurants	45%	47%	41%	34%
Household appliances	41%	45%	43%	36%
Home improvement, garden and pets	41%	43%	41%	36%
Furniture/Household Goods	44%	44%	38%	31%
Beauty/Fashion	45%	44%	36%	26%
Travel/Hospitality	42%	41%	38%	33%
Financial services/banking	35%	37%	39%	39%
Sports/entertainment	40%	39%	37%	27%
Gaming/gambling	24%	26%	21%	12%

Legend: 18-25 Years old, 26-40 Years old, 41-55 Years old, 56-75 Years old

When it comes to social media platforms and the security of your personal information, which of the following statements best describes your attitude?

Australia

I don't trust social media platforms with my data at all, but my behavior hasn't really changed
- 37%
- 36%
- 37%
- 40%

I don't trust social media platforms with my data at all, and I'm changing my behavior
- 13%
- 26%
- 28%
- 36%

I trust social media platforms to use my data more responsibly moving forward
- 37%
- 22%
- 15%
- 16%

My data is going to be out there no matter what, so I don't bother trying to control it
- 8%
- 13%
- 14%
- 6%

I don't care
- 6%
- 4%
- 6%
- 1%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

France

I don't trust social media platforms with my data at all, but my behavior hasn't really changed
- 38%
- 39%
- 36%
- 33%

I don't trust social media platforms with my data at all, and I'm changing my behavior
- 19%
- 28%
- 28%
- 36%

I trust social media platforms to use my data more responsibly moving forward
- 22%
- 18%
- 18%
- 13%

My data is going to be out there no matter what, so I don't bother trying to control it
- 14%
- 12%
- 13%
- 13%

I don't care
- 6%
- 4%
- 5%
- 6%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Japan

I trust social media platforms to use my data more responsibly moving forward
- 36%
- 40%
- 35%
- 31%

I don't trust social media platforms with my data at all, but my behavior hasn't really changed
- 29%
- 33%
- 29%
- 39%

I don't trust social media platforms with my data at all, and I'm changing my behavior
- 12%
- 12%
- 11%
- 14%

I don't care
- 11%
- 9%
- 13%
- 8%

My data is going to be out there no matter what, so I don't bother trying to control it
- 12%
- 6%
- 13%
- 8%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Spain

I trust social media platforms to use my data more responsibly moving forward
- 40%
- 37%
- 38%
- 40%

I don't trust social media platforms with my data at all, but my behavior hasn't really changed
- 32%
- 28%
- 32%
- 24%

I don't trust social media platforms with my data at all, and I'm changing my behavior
- 16%
- 26%
- 24%
- 28%

My data is going to be out there no matter what, so I don't bother trying to control it
- 6%
- 3%
- 5%
- 4%

I don't care
- 6%
- 3%
- 1%
- 3%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

UK

I don't trust social media platforms with my data at all, but my behavior hasn't really changed
- 46%
- 33%
- 34%
- 38%

I trust social media platforms to use my data more responsibly moving forward
- 29%
- 28%
- 25%
- 16%

I don't trust social media platforms with my data at all, and I'm changing my behavior
- 10%
- 21%
- 23%
- 35%

My data is going to be out there no matter what, so I don't bother trying to control it
- 9%
- 12%
- 9%
- 10%

I don't care
- 6%
- 5%
- 6%
- 2%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

I don't trust social media platforms with my data at all, but my behavior hasn't really changed
- 37%
- 26%
- 29%
- 33%

I trust social media platforms to use my data more responsibly moving forward
- 32%
- 33%
- 29%
- 11%

I don't trust social media platforms with my data at all, and I'm changing my behavior
- 11%
- 22%
- 27%
- 43%

My data is going to be out there no matter what, so I don't bother trying to control it
- 9%
- 16%
- 12%
- 10%

I don't care
- 11%
- 2%
- 3%
- 2%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

I don't trust social media platforms with my data at all, but my behavior hasn't really changed
- 36%
- 33%
- 33%
- 35%

I trust social media platforms to use my data more responsibly moving forward
- 34%
- 29%
- 27%
- 20%

I don't trust social media platforms with my data at all, and I'm changing my behavior
- 14%
- 23%
- 24%
- 33%

My data is going to be out there no matter what, so I don't bother trying to control it
- 9%
- 11%
- 11%
- 9%

I don't care
- 7%
- 5%
- 6%
- 3%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

And now some questions about your opinions and use of social media channels. Please note whether you agree with the following statements (1-2)

Australia

Statement	18-25	26-40	41-55	56-75
I see a lot of content these days which doesn't interest me	67%	81%	88%	94%
I don't think social media platforms do enough to delete harmful content (e.g. hate speech, fake news)	73%	76%	80%	89%
I'm concerned about the polarization of political opinion on social media (e.g. elections, social issues etc.)	67%	70%	75%	86%
I'm sharing less data with platforms because it's too hard to track how it's being used	63%	68%	77%	86%
I feel manipulated by the algorithms and rules which control what content I see	61%	67%	72%	75%
I don't trust advertising I see on social media	57%	61%	62%	84%
I'm actively engaging less with social media for the sake of my mental health	56%	59%	56%	56%
I have closed or stopped using an account in the last year because I have been upset by posts I have seen	43%	38%	34%	29%

France

Statement	18-25	26-40	41-55	56-75
I don't think social media platforms do enough to delete harmful content (e.g. hate speech, fake news)	77%	74%	76%	83%
I see a lot of content these days which doesn't interest me	53%	65%	69%	85%
I'm sharing less data with platforms because it's too hard to track how it's being used	56%	67%	67%	82%
I don't trust advertising I see on social media	65%	63%	69%	75%
I'm actively engaging less with social media for the sake of my mental health	58%	62%	60%	72%
I feel manipulated by the algorithms and rules which control what content I see	52%	65%	59%	72%
I'm concerned about the polarization of political opinion on social media (e.g. elections, social issues etc.)	43%	58%	56%	75%
I have closed or stopped using an account in the last year because I have been upset by posts I have seen	42%	35%	30%	33%

Japan

Statement	18-25	26-40	41-55	56-75
I don't think social media platforms do enough to delete harmful content (e.g. hate speech, fake news)	61%	70%	81%	87%
I see a lot of content these days which doesn't interest me	58%	68%	81%	83%
I don't trust advertising I see on social media	60%	65%	73%	76%
I'm concerned about the polarization of political opinion on social media (e.g. elections, social issues etc.)	59%	59%	61%	81%
I'm sharing less data with platforms because it's too hard to track how it's being used	56%	58%	67%	73%
I feel manipulated by the algorithms and rules which control what content I see	49%	59%	69%	74%
I'm actively engaging less with social media for the sake of my mental health	43%	52%	48%	56%
I have closed or stopped using an account in the last year because I have been upset by posts I have seen	30%	34%	36%	31%

Spain

Statement	18-25	26-40	41-55	56-75
I don't think social media platforms do enough to delete harmful content (e.g. hate speech, fake news)	66%	66%	66%	74%
I'm sharing less data with platforms because it's too hard to track how it's being used	57%	65%	69%	73%
I'm concerned about the polarization of political opinion on social media (e.g. elections, social issues etc.)	56%	62%	69%	67%
I see a lot of content these days which doesn't interest me	57%	62%	61%	67%
I feel manipulated by the algorithms and rules which control what content I see	61%	54%	65%	62%
I'm actively engaging less with social media for the sake of my mental health	52%	58%	62%	66%
I don't trust advertising I see on social media	52%	57%	61%	57%
I have closed or stopped using an account in the last year because I have been upset by posts I have seen	39%	42%	42%	40%

Legend: 18-25 Years old, 26-40 Years old, 41-55 Years old, 56-75 Years old

And now some questions about your opinions and use of social media channels. Please note whether you agree with the following statements (2-2)

UK

I don't think social media platforms do enough to delete harmful content (e.g. hate speech, fake news)
- 70%
- 67%
- 76%
- 86%

I see a lot of content these days which doesn't interest me
- 62%
- 68%
- 76%
- 89%

I'm sharing less data with platforms because it's too hard to track how it's being used
- 58%
- 61%
- 66%
- 76%

I don't trust advertising I see on social media
- 60%
- 58%
- 64%
- 73%

I'm concerned about the polarization of political opinion on social media (e.g. elections, social issues etc.)
- 52%
- 57%
- 66%
- 72%

I feel manipulated by the algorithms and rules which control what content I see
- 49%
- 59%
- 60%
- 70%

I'm actively engaging less with social media for the sake of my mental health
- 55%
- 57%
- 50%
- 48%

I have closed or stopped using an account in the last year because I have been upset by posts I have seen
- 39%
- 39%
- 34%
- 32%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

I see a lot of content these days which doesn't interest me
- 61%
- 69%
- 74%
- 93%

I'm concerned about the polarization of political opinion on social media (e.g. elections, social issues etc.)
- 59%
- 68%
- 67%
- 85%

I don't think social media platforms do enough to delete harmful content (e.g. hate speech, fake news)
- 64%
- 65%
- 71%
- 78%

I'm sharing less data with platforms because it's too hard to track how it's being used
- 60%
- 63%
- 67%
- 85%

I feel manipulated by the algorithms and rules which control what content I see
- 62%
- 49%
- 57%
- 77%

I don't trust advertising I see on social media
- 55%
- 49%
- 52%
- 78%

I'm actively engaging less with social media for the sake of my mental health
- 54%
- 59%
- 58%
- 55%

I have closed or stopped using an account in the last year because I have been upset by posts I have seen
- 39%
- 43%
- 38%
- 37%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

I don't think social media platforms do enough to delete harmful content (e.g. hate speech, fake news)
- 68%
- 70%
- 75%
- 83%

I see a lot of content these days which doesn't interest me
- 60%
- 69%
- 75%
- 87%

I'm sharing less data with platforms because it's too hard to track how it's being used
- 59%
- 64%
- 69%
- 80%

I'm concerned about the polarization of political opinion on social media (e.g. elections, social issues etc.)
- 58%
- 62%
- 65%
- 78%

I don't trust advertising I see on social media
- 57%
- 59%
- 63%
- 74%

I feel manipulated by the algorithms and rules which control what content I see
- 56%
- 60%
- 63%
- 72%

I'm actively engaging less with social media for the sake of my mental health
- 53%
- 58%
- 56%
- 59%

I have closed or stopped using an account in the last year because I have been upset by posts I have seen
- 39%
- 38%
- 36%
- 34%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Thinking about the companies you've made an online purchase from in the last six months, were they based in any of the following industry sectors? (1-2)

Australia

Beauty/Fashion
- 57%
- 58%
- 57%
- 47%

Food/Grocery shopping
- 52%
- 56%
- 45%
- 41%

Restaurants
- 44%
- 56%
- 38%
- 32%

Home improvement, garden and pets
- 29%
- 34%
- 32%
- 38%

Travel/Hospitality
- 27%
- 31%
- 18%
- 34%

Household appliances
- 23%
- 31%
- 30%
- 25%

Furniture/Household Goods
- 26%
- 30%
- 23%
- 17%

Sports/entertainment
- 24%
- 25%
- 23%
- 14%

Financial services/banking
- 20%
- 19%
- 22%
- 17%

Gaming/gambling
- 18%
- 16%
- 23%
- 19%

Legend: 18-25 Years old, 26-40 Years old, 41-55 Years old, 56-75 Years old

France

Beauty/Fashion
- 52%
- 62%
- 48%
- 35%

Food/Grocery shopping
- 49%
- 48%
- 45%
- 31%

Restaurants
- 43%
- 41%
- 33%
- 27%

Travel/Hospitality
- 26%
- 23%
- 30%
- 41%

Home improvement, garden and pets
- 29%
- 28%
- 31%
- 31%

Household appliances
- 23%
- 33%
- 25%
- 38%

Gaming/gambling
- 26%
- 22%
- 25%
- 26%

Sports/entertainment
- 33%
- 24%
- 20%
- 22%

Furniture/Household Goods
- 19%
- 32%
- 26%
- 17%

Financial services/banking
- 21%
- 17%
- 14%
- 32%

Legend: 18-25 Years old, 26-40 Years old, 41-55 Years old, 56-75 Years old

Japan

Beauty/Fashion
- 57%
- 55%
- 44%
- 34%

Household appliances
- 23%
- 37%
- 37%
- 59%

Food/Grocery shopping
- 29%
- 41%
- 38%
- 46%

Furniture/Household Goods
- 34%
- 35%
- 27%
- 26%

Travel/Hospitality
- 25%
- 33%
- 27%
- 31%

Restaurants
- 27%
- 35%
- 28%
- 19%

Home improvement, garden and pets
- 19%
- 27%
- 25%
- 25%

Sports/entertainment
- 25%
- 27%
- 18%
- 18%

Gaming/gambling
- 26%
- 31%
- 14%
- 12%

Financial services/banking
- 16%
- 16%
- 17%
- 28%

Legend: 18-25 Years old, 26-40 Years old, 41-55 Years old, 56-75 Years old

Spain

Restaurants
- 39%
- 46%
- 45%
- 48%

Beauty/Fashion
- 52%
- 40%
- 41%
- 39%

Travel/Hospitality
- 36%
- 42%
- 40%
- 39%

Food/Grocery shopping
- 34%
- 42%
- 42%
- 39%

Household appliances
- 31%
- 31%
- 39%
- 32%

Sports/entertainment
- 27%
- 33%
- 36%
- 23%

Home improvement, garden and pets
- 27%
- 28%
- 27%
- 36%

Financial services/banking
- 15%
- 19%
- 33%
- 26%

Furniture/Household Goods
- 28%
- 24%
- 18%
- 18%

Gaming/gambling
- 21%
- 21%
- 22%
- 19%

Legend: 18-25 Years old, 26-40 Years old, 41-55 Years old, 56-75 Years old

Thinking about the companies you've made an online purchase from in the last six months, were they based in any of the following industry sectors? (2-2)

UK

Food/Grocery shopping
- 43%
- 52%
- 55%
- 53%

Beauty/Fashion
- 46%
- 42%
- 45%
- 48%

Restaurants
- 38%
- 38%
- 47%
- 30%

Home improvement, garden and pets
- 24%
- 35%
- 27%
- 37%

Travel/Hospitality
- 25%
- 27%
- 26%
- 34%

Household appliances
- 23%
- 25%
- 29%
- 34%

Furniture/Household Goods
- 26%
- 26%
- 33%
- 21%

Gaming/gambling
- 21%
- 30%
- 27%
- 16%

Financial services/banking
- 21%
- 21%
- 23%
- 29%

Sports/entertainment
- 25%
- 27%
- 20%
- 17%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

Food/Grocery shopping
- 45%
- 56%
- 56%
- 48%

Beauty/Fashion
- 47%
- 49%
- 53%
- 52%

Restaurants
- 40%
- 49%
- 48%
- 52%

Home improvement, garden and pets
- 29%
- 39%
- 41%
- 43%

Travel/Hospitality
- 27%
- 33%
- 28%
- 29%

Furniture/Household Goods
- 30%
- 32%
- 26%
- 16%

Financial services/banking
- 15%
- 29%
- 34%
- 22%

Household appliances
- 24%
- 27%
- 29%
- 17%

Sports/entertainment
- 23%
- 28%
- 24%
- 11%

Gaming/gambling
- 16%
- 25%
- 27%
- 4%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

Beauty/Fashion
- 53%
- 52%
- 48%
- 43%

Food/Grocery shopping
- 42%
- 49%
- 47%
- 43%

Restaurants
- 38%
- 44%
- 40%
- 35%

Travel/Hospitality
- 28%
- 31%
- 29%
- 35%

Home improvement, garden and pets
- 26%
- 31%
- 30%
- 36%

Household appliances
- 25%
- 31%
- 31%
- 33%

Furniture/Household Goods
- 28%
- 30%
- 26%
- 19%

Sports/entertainment
- 26%
- 27%
- 23%
- 17%

Financial services/banking
- 18%
- 20%
- 24%
- 26%

Gaming/gambling
- 21%
- 24%
- 23%
- 16%

18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Of those companies you've purchased from in the last six months, which do you think provided the best online customer experience? (1-2)

Australia

Beauty/Fashion (e.g. bought clothes or makeup online)
- 38%
- 32%
- 33%
- 23%

Food/Grocery shopping (e.g. bought online for delivery or pickup)
- 26%
- 33%
- 33%
- 30%

Restaurants (e.g. ordered online for delivery or pickup)
- 17%
- 22%
- 16%
- 12%

Home improvement, garden and pets (e.g. bought pet supplies online)
- 15%
- 12%
- 14%
- 18%

Travel/Hospitality (e.g. booked holiday or hotel room online)
- 11%
- 11%
- 10%
- 22%

Household appliances (e.g. purchased a new fridge/freezer online)
- 12%
- 13%
- 9%
- 11%

Financial services/banking (e.g. took out a loan online)
- 7%
- 11%
- 11%
- 12%

Gaming/gambling (e.g. placed a bet online)
- 7%
- 8%
- 10%
- 8%

Furniture/Household Goods (e.g. bought new sofa or table online)
- 7%
- 13%
- 6%
- 6%

Sports/entertainment (e.g. bought streaming subscription online)
- 7%
- 10%
- 9%
- 5%

France

Beauty/Fashion (e.g. bought clothes or makeup online)
- 33%
- 39%
- 30%
- 17%

Food/Grocery shopping (e.g. bought online for delivery or pickup)
- 14%
- 23%
- 25%
- 16%

Travel/Hospitality (e.g. booked holiday or hotel room online)
- 11%
- 9%
- 17%
- 29%

Restaurants (e.g. ordered online for delivery or pickup)
- 23%
- 13%
- 15%
- 12%

Household appliances (e.g. purchased a new fridge/freezer online)
- 10%
- 16%
- 14%
- 18%

Home improvement, garden and pets (e.g. bought pet supplies online)
- 11%
- 10%
- 10%
- 17%

Sports/entertainment (e.g. bought streaming subscription online)
- 15%
- 11%
- 10%
- 11%

Financial services/banking (e.g. took out a loan online)
- 9%
- 6%
- 7%
- 19%

Gaming/gambling (e.g. placed a bet online)
- 12%
- 7%
- 10%
- 12%

Furniture/Household Goods (e.g. bought new sofa or table online)
- 5%
- 10%
- 13%
- 6%

Japan

Beauty/Fashion (e.g. bought clothes or makeup online)
- 48%
- 34%
- 29%
- 13%

Household appliances (e.g. purchased a new fridge/freezer online)
- 10%
- 16%
- 15%
- 31%

Food/Grocery shopping (e.g. bought online for delivery or pickup)
- 12%
- 19%
- 14%
- 21%

Travel/Hospitality (e.g. booked holiday or hotel room online)
- 12%
- 18%
- 15%
- 18%

Sports/entertainment (e.g. bought streaming subscription online)
- 14%
- 11%
- 11%
- 13%

Furniture/Household Goods (e.g. bought new sofa or table online)
- 12%
- 17%
- 4%
- 9%

Financial services/banking (e.g. took out a loan online)
- 5%
- 8%
- 10%
- 17%

Home improvement, garden and pets (e.g. bought pet supplies online)
- 10%
- 14%
- 9%
- 7%

Restaurants (e.g. ordered online for delivery or pickup)
- 10%
- 14%
- 9%
- 5%

Gaming/gambling (e.g. placed a bet online)
- 6%
- 13%
- 5%
- 4%

Spain

Beauty/Fashion (e.g. bought clothes or makeup online)
- 41%
- 24%
- 20%
- 22%

Restaurants (e.g. ordered online for delivery or pickup)
- 19%
- 27%
- 21%
- 23%

Travel/Hospitality (e.g. booked holiday or hotel room online)
- 16%
- 20%
- 24%
- 28%

Food/Grocery shopping (e.g. bought online for delivery or pickup)
- 15%
- 19%
- 15%
- 24%

Household appliances (e.g. purchased a new fridge/freezer online)
- 13%
- 14%
- 26%
- 15%

Sports/entertainment (e.g. bought streaming subscription online)
- 14%
- 15%
- 19%
- 11%

Home improvement, garden and pets (e.g. bought pet supplies online)
- 10%
- 11%
- 10%
- 15%

Financial services/banking (e.g. took out a loan online)
- 5%
- 8%
- 19%
- 12%

Furniture/Household Goods (e.g. bought new sofa or table online)
- 11%
- 10%
- 6%
- 7%

Gaming/gambling (e.g. placed a bet online)
- 10%
- 8%
- 8%
- 5%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Of those companies you've purchased from in the last six months, which do you think provided the best online customer experience? (2-2)

UK

Food/Grocery shopping (e.g. bought online for delivery or pickup)
- 19%
- 35%
- 31%
- 33%

Beauty/Fashion (e.g. bought clothes or makeup online)
- 25%
- 24%
- 22%
- 23%

Restaurants (e.g. ordered online for delivery or pickup)
- 14%
- 18%
- 21%
- 11%

Travel/Hospitality (e.g. booked holiday or hotel room online)
- 13%
- 12%
- 13%
- 22%

Furniture/Household Goods (e.g. bought new sofa or table online)
- 16%
- 10%
- 13%
- 10%

Household appliances (e.g. purchased a new fridge/freezer online)
- 6%
- 8%
- 16%
- 18%

Financial services/banking (e.g. took out a loan online)
- 10%
- 12%
- 14%
- 11%

Home improvement, garden and pets (e.g. bought pet supplies online)
- 10%
- 13%
- 10%
- 11%

Sports/entertainment (e.g. bought streaming subscription online)
- 11%
- 12%
- 10%
- 4%

Gaming/gambling (e.g. placed a bet online)
- 5%
- 10%
- 12%
- 3%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

US

Food/Grocery shopping (e.g. bought online for delivery or pickup)
- 26%
- 36%
- 35%
- 30%

Beauty/Fashion (e.g. bought clothes or makeup online)
- 32%
- 28%
- 28%
- 25%

Restaurants (e.g. ordered online for delivery or pickup)
- 20%
- 24%
- 29%
- 27%

Home improvement, garden and pets (e.g. bought pet supplies online)
- 18%
- 23%
- 19%
- 22%

Travel/Hospitality (e.g. booked holiday or hotel room online)
- 11%
- 19%
- 17%
- 18%

Financial services/banking (e.g. took out a loan online)
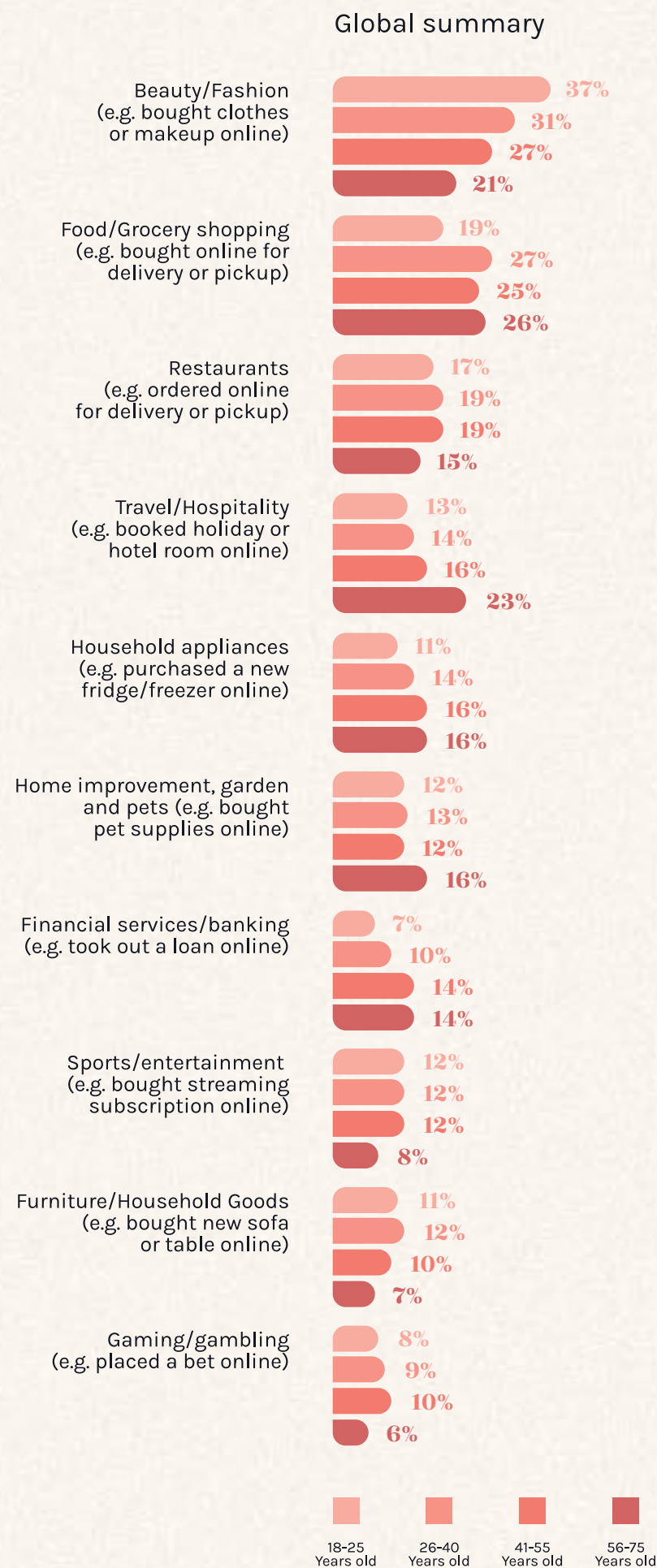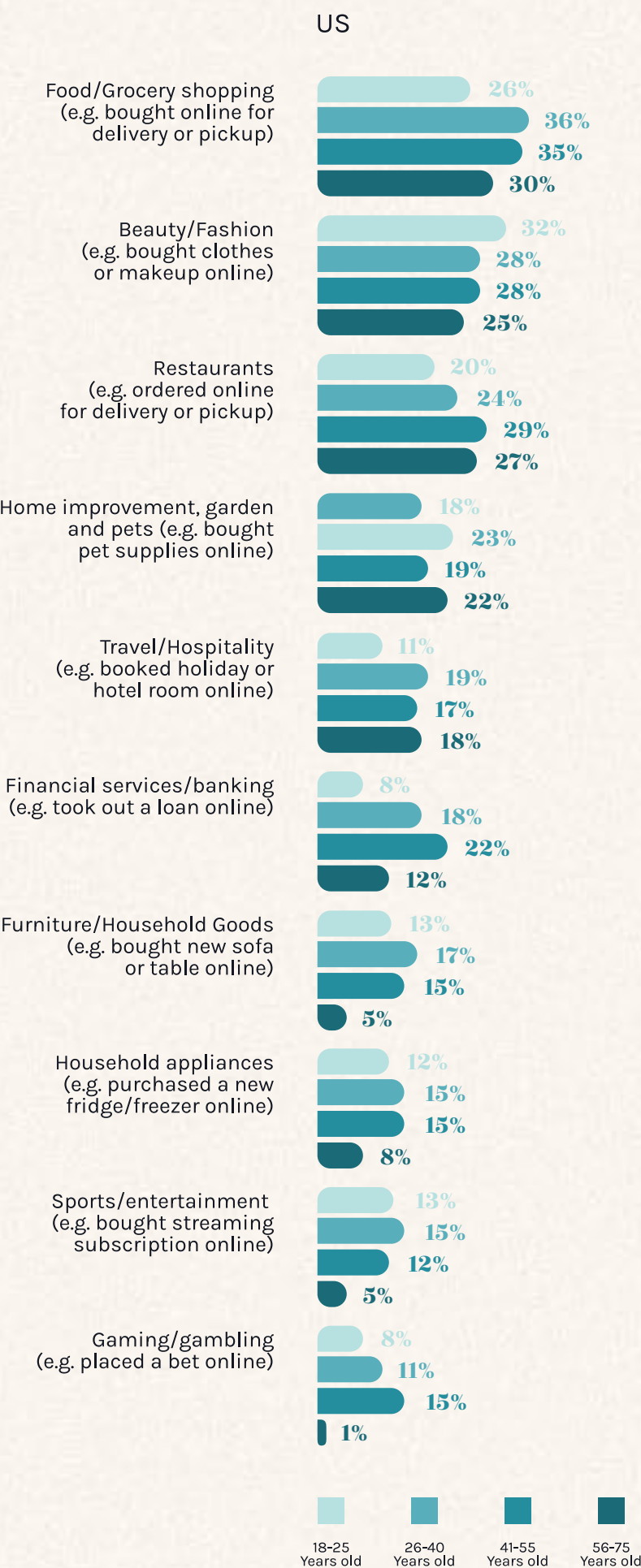- 8%
- 18%
- 22%
- 12%

Furniture/Household Goods (e.g. bought new sofa or table online)
- 13%
- 17%
- 15%
- 5%

Household appliances (e.g. purchased a new fridge/freezer online)
- 12%
- 15%
- 15%
- 8%

Sports/entertainment (e.g. bought streaming subscription online)
- 13%
- 15%
- 12%
- 5%

Gaming/gambling (e.g. placed a bet online)
- 8%
- 11%
- 15%
- 1%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Global summary

Beauty/Fashion (e.g. bought clothes or makeup online)
- 37%
- 31%
- 27%
- 21%

Food/Grocery shopping (e.g. bought online for delivery or pickup)
- 19%
- 27%
- 25%
- 26%

Restaurants (e.g. ordered online for delivery or pickup)
- 17%
- 19%
- 19%
- 15%

Travel/Hospitality (e.g. booked holiday or hotel room online)
- 13%
- 14%
- 16%
- 23%

Household appliances (e.g. purchased a new fridge/freezer online)
- 11%
- 14%
- 16%
- 16%

Home improvement, garden and pets (e.g. bought pet supplies online)
- 12%
- 13%
- 12%
- 16%

Financial services/banking (e.g. took out a loan online)
- 7%
- 10%
- 14%
- 14%

Sports/entertainment (e.g. bought streaming subscription online)
- 12%
- 12%
- 12%
- 8%

Furniture/Household Goods (e.g. bought new sofa or table online)
- 11%
- 12%
- 10%
- 7%

Gaming/gambling (e.g. placed a bet online)
- 8%
- 9%
- 10%
- 6%

Legend: 18-25 Years old | 26-40 Years old | 41-55 Years old | 56-75 Years old

Final Dashboard (1-4)

Demographics (AUS)

Gender

18-25 Years old
- 25%
- 74%
- 1%
- 1%

26-40 Years old
- 30%
- 69%
- 1%
- 0%

41-55 Years old
- 33%
- 67%
- 0%
- 0%

56-75 Years old
- 37%
- 63%
- 0%
- 0%

Male | Female | Other | Prefer not to say

Annual Household Income

18-25 Years old
- 17%
- 31%
- 19%
- 21%
- 10%
- 2%

26-40 Years old
- 13%
- 24%
- 23%
- 24%
- 11%
- 5%

41-55 Years old
- 18%
- 27%
- 16%
- 18%
- 18%
- 2%

56-75 Years old
- 40%
- 24%
- 16%
- 11%
- 5%
- 3%

- $0 - $25,000
- $25,001 - $50,000
- $50,001 - $75,000
- $75,001 - $100,000
- $100,001 - $150,000
- Over $150,000

Age
- 18-25: 21%
- 26-40: 35%
- 41-55: 14%
- 56-75: 30%

Demographics (France)

Gender

18-25 Years old
- 37%
- 63%
- 0%
- 0%

26-40 Years old
- 27%
- 72%
- 0%
- 0%

41-55 Years old
- 39%
- 61%
- 0%
- 0%

56-75 Years old
- 94%
- 6%
- 0%
- 0%

Male | Female | Other | Prefer not to say

Annual Household Income

18-25 Years old
- 39%
- 37%
- 18%
- 6%
- 0%
- 0%

26-40 Years old
- 33%
- 49%
- 13%
- 4%
- 1%
- 0%

41-55 Years old
- 21%
- 41%
- 23%
- 10%
- 2%
- 2%

56-75 Years old
- 19%
- 54%
- 19%
- 7%
- 0%
- 0%

- $0 - $25,000
- $25,001 - $50,000
- $50,001 - $75,000
- $75,001 - $100,000
- $100,001 - $150,000
- Over $150,000

Age
- 18-25: 10%
- 26-40: 48%
- 41-55: 15%
- 56-75: 27%

Final Dashboard (2-4)

Demographics (Japan)

Gender

18-25 Years old
- 19%
- 78%
- 2%
- 1%

26-40 Years old
- 36%
- 64%
- 0%
- 0%

41-55 Years old
- 46%
- 53%
- 1%
- 1%

56-75 Years old
- 71%
- 28%
- 0%
- 1%

Male | Female | Other | Prefer not to say

Annual Household Income

18-25 Years old
- 23%
- 28%
- 24%
- 14%
- 9%
- 2%

26-40 Years old
- 5%
- 27%
- 32%
- 22%
- 11%
- 3%

41-55 Years old
- 11%
- 24%
- 25%
- 24%
- 14%
- 3%

56-75 Years old
- 17%
- 38%
- 19%
- 13%
- 10%
- 3%

- $0 - $25,000
- $25,001 - $50,000
- $50,001 - $75,000
- $75,001 - $100,000
- $100,001 - $150,000
- Over $150,000

Age
- 56-75 **24%**
- 18-25 **19%**
- 41-55 **20%**
- 26-40 **37%**

Demographics (Spain)

Gender

18-25 Years old
- 34%
- 66%
- 1%
- 0%

26-40 Years old
- 56%
- 44%
- 0%
- 0%

41-55 Years old
- 69%
- 31%
- 0%
- 0%

56-75 Years old
- 46%
- 54%
- 0%
- 0%

Male | Female | Other | Prefer not to say

Annual Household Income

18-25 Years old
- 34%
- 35%
- 12%
- 3%
- 1%
- 0%

26-40 Years old
- 42%
- 42%
- 10%
- 4%
- 1%
- 0%

41-55 Years old
- 32%
- 42%
- 20%
- 4%
- 1%
- 0%

56-75 Years old
- 42%
- 41%
- 12%
- 4%
- 1%
- 0%

- $0 - $25,000
- $25,001 - $50,000
- $50,001 - $75,000
- $75,001 - $100,000
- $100,001 - $150,000
- Over $150,000

Age
- 56-75 **23%**
- 18-25 **22%**
- 41-55 **17%**
- 26-40 **38%**

Final Dashboard (3-4)

Demographics (UK)

Gender

18-25 Years old
- 18%
- 81%
- 1%
- 0%

26-40 Years old
- 57%
- 43%
- 0%
- 0%

41-55 Years old
- 37%
- 63%
- 0%
- 0%

56-75 Years old
- 40%
- 60%
- 0%
- 0%

Male | Female | Other | Prefer not to say

Age
- 18-25 **12%**
- 26-40 **39%**
- 41-55 **18%**
- 56-75 **32%**

Annual Household Income

18-25 Years old
- 30%
- 36%
- 18%
- 7%
- 6%
- 3%

26-40 Years old
- 24%
- 38%
- 22%
- 11%
- 4%
- 1%

41-55 Years old
- 30%
- 31%
- 22%
- 8%
- 5%
- 4%

56-75 Years old
- 32%
- 34%
- 16%
- 10%
- 6%
- 1%

- $0 - $25,000
- $25,001 - $50,000
- $50,001 - $75,000
- $75,001 - $100,000
- $100,001 - $150,000
- Over $150,000

Demographics (US)

Gender

18-25 Years old
- 26%
- 73%
- 1%
- 0%

26-40 Years old
- 46%
- 53%
- 1%
- 0%

41-55 Years old
- 38%
- 62%
- 1%
- 0%

56-75 Years old
- 33%
- 67%
- 0%
- 0%

Male | Female | Other | Prefer not to say

Age
- 18-25 **14%**
- 26-40 **33%**
- 41-55 **19%**
- 56-75 **34%**

Annual Household Income

18-25 Years old
- 36%
- 33%
- 18%
- 8%
- 3%
- 3%

26-40 Years old
- 19%
- 24%
- 14%
- 9%
- 25%
- 9%

41-55 Years old
- 20%
- 29%
- 19%
- 10%
- 13%
- 8%

56-75 Years old
- 17%
- 28%
- 22%
- 13%
- 11%
- 8%

- $0 - $25,000
- $25,001 - $50,000
- $50,001 - $75,000
- $75,001 - $100,000
- $100,001 - $150,000
- Over $150,000

Final Dashboard (4-4)

Global Summary

Gender
- MALE **42%**
- FEMALE **57%**

Annual Household Income
- $0 - $25,000
- $25,001 - $50,000
- $50,001 - $75,000
- $75,001 - $100,000
- $100,001 - $150,000
- Over $150,000

Age
- 18-25 **16%**
- 26-40 **39%**
- 41-55 **17%**
- 56-75 **28%**