

## Background

In a joint effort to seek answers to the question “How do we want to live in 10 years?” Goethe University and Foresight Academy collaborated on using Mass Customer Foresight as a new market research approach. A quantitative study was intended to supplement and validate pre-existing qualitative research by Foresight Academy. The quantitative study was developed based on qualitative interviews with trend receivers conducted by Foresight Academy. The key topics identified for the quantitative study were consumption, technology, and living.

## Study Details

The 15-minute online study surveyed 6,000 participants from the United States, Germany, and China (2,000 participants per country) during a two-month period (July – September) in 2020. Participant sampling was representative with respect to gender, age, and region for each country.

## Summary of the Findings

The key findings of the study are summarized in the table below:

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CONSUMPTION	<ol style="list-style-type: none"><li>1. There are few differences between countries with respect to perceived barriers to environmentally friendly and ethical consumption.</li><li>2. Differences between collectivist and individualist cultures exist for social barriers, assumed inferior product quality, and the perceived responsibility for environmentally friendly and ethical consumption.</li><li>3. Attitudes of collectivist and individualist cultures converge for younger age groups.</li></ol>
TECHNOLOGY	<ol style="list-style-type: none"><li>4. Collectivist and individualist cultures differ in their attitudes towards advanced technologies and their willingness to share data.</li><li>5. In collectivist cultures social media seems to play a more important role than in individualist cultures.</li><li>6. Attitudes of collectivist and individualist cultures converge for younger age groups.</li></ol>
LIVING	<ol style="list-style-type: none"><li>7. The desire for access to nature and balance is a global phenomenon.</li></ol>

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## Key Findings

The key findings for each topic are explained in more detail below.

## CONSUMPTION

- ▶ **Importance of brands:** Purchasing brands is less important for older age groups compared to younger age groups in Germany and the United States. Chinese consumers place overall higher importance on brands, but here the youngest age group (18-25 years) exhibits the least interest in purchasing brands.
- ▶ **Barriers to environmentally friendly and ethical consumption:** There are few country or age differences for most barriers (range 3-4 on a 6-point scale: price, convenience, product availability, effort to change behavior, low effectiveness of own efforts).
  - The strongest barrier overall is inferior product quality/performance, especially in China and among older Germans.
  - Although overall experienced as a low barrier, Chinese consumers experience family and friends as a higher barrier to acting in an environmentally friendly and ethical way than consumers from Germany and the United States, which is consistent with collectivist and individualist cultures. This cultural difference is smaller for younger age groups.
- ▶ **Responsibility for Environmentally Friendly and Ethical Consumption:** In the individualist countries Germany and the United States, the individual (as opposed to companies or the government) is predominantly seen as responsible for environmentally friendly and ethical consumption. This is more pronounced for older relative to younger age groups. This pattern reverses for the collectivist country China, but the difference between countries disappears for the youngest age groups (18-25 years). In all three countries, the responsibility of companies is in between the individual and the government with roughly 50% of participants assigning companies the second rank.

## TECHNOLOGY

- ▶ **Attitude towards smart homes:** Chinese consumers exhibit the highest positive attitude, followed by the United States in second, and Germany in third place. In Germany and the United States, positive attitude decreases with age. This age difference is less pronounced in China, where the youngest age group (18-25 years) does not exhibit the highest positive attitude. There is also a gender difference: While attitudes between men and women hardly differ in China, men exhibit more positive attitudes than women in the United States and Germany.
- ▶ **Attitude towards autonomous driving:** The highest positive attitude can be observed in China. While attitudes decrease with age for each country, this tendency is less pronounced for China. For younger people, attitudes converge between countries, closing the gap between countries for the youngest age group (18-25 years). A gender difference occurs such that men exhibit more positive attitudes than women. The difference is largest for the United States and smallest in China.

- ▶ **Willingness to share data:** The willingness to share data to get more personalized services is largest in China. The gap between countries for each age group narrows down for younger age groups.
- ▶ **Willingness to live without social media:** Consumers from the United States are most willing to do without social media in their lives, followed by consumers from Germany in second, and those from China in third place. Across countries, this willingness increases with age.

## LIVING

- ▶ **Commuting:** Commuting to work and back home is more time-consuming in China and the United States than in Germany. Commuting hours are slightly higher for younger compared to older age groups across all countries.
- ▶ **Frequent access to nature:** Having frequent access to nature is perceived as highly important irrespective of country, exhibiting the highest rating across all countries from all three topics. While its importance increases with age for Germany and slightly less so for the United States, China reveals a curved pattern, the oldest (56-65 years) and youngest (18-25 years) age group indicating the least importance.
- ▶ **Desire for more balance:** More balance in daily life to have more time to focus on what is individually important is strongly desired across countries. The oldest (56-65 years) and youngest (18-25 years) age categories express the least desire across countries compared to the age groups in the middle. This pattern is especially pronounced in China.