ACROSS THE AGES SURVEY (DE Results)

Advantis | ADI | Adobe Advertising Cloud | August 2019
Findings Overview

Generation Z either doesn’t hear about personal data breaches/abuse or thinks that they are exaggerated or made up.

- Almost 3/5 of Gen Z is unaware of personal data abuse or thinks it is exaggerated/untrue - Boomers are more aware, only 1/3 share this belief.
- All generations believe that more education is needed for both children and retirees on the dangers of personal data loss and protection.

Gen Z is seen as much more susceptible to online manipulation than other generations.

- Overall Gen Z is seen as the most easily influenced by over 1/2 of people, including by 2/3 of Gen Z themselves!

Younger generations see a place for companies along with individuals on social networks.

- 3/5 of Gen Z is comfortable with companies on social networks compared to 1/4 of Boomers.
- Over half of Gen Z report interacting with companies who place ads on social networks, compared to 1/9 of Boomers.

Only 1 in 5 people think politicians will act to protect their personal data - surprising, given the strong data protections in place.

- Older generations think politicians will fail because they are beholden to lobbyists.
- Younger generations think that politicians are too out-of-touch to legislate effectively or that the tech industry moves too fast to be effectively regulated.

These findings are the result of a survey of 1,202 German citizens born between 2001 and 1944. Data is balanced to the gender proportions found in the general population. The survey was conducted from August 6th to 14th, 2019. This report includes highlighted results. Full results are available to the project team at https://portal.advanis.net/adbe.
Survey participants are living in Germany and mainly working full time, even mix of age and gender

<table>
<thead>
<tr>
<th>Age</th>
<th>Gender</th>
<th>Employment status</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gen Z:</strong> Born 1996 - TBD</td>
<td>Female 51%</td>
<td>Full-time employee 49%</td>
</tr>
<tr>
<td><strong>Millennials:</strong> Born 1977 - 1995</td>
<td>Male 49%</td>
<td>Part-time employee 12%</td>
</tr>
<tr>
<td><strong>Generation X:</strong> Born 1965 - 1976</td>
<td>Female 51%</td>
<td>Self-employed 5%</td>
</tr>
<tr>
<td><strong>Baby Boomers:</strong> Born 1946 - 1964</td>
<td>Male 49%</td>
<td>Full-time student 10%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Retired 12%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Homemaker 4%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not working but looking for... 5%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other 3%</td>
</tr>
</tbody>
</table>
Key Findings
Print media is highly trusted by all (with personal data)
Boomers are most trusting of TV media
Social media is reasonably trusted by younger generations

**Media Trusted Most with Personal Data**

- **TV (Broadcast, Satellite, Connected)**
  - Younger: 39%
  - Boomers: 57%

- **Online (Websites, Social Media, Online News, Personal Blogs)**
  - Younger: 39%
  - Boomers: 31%

- **Print (Magazines, Newspapers)**
  - Younger: 47%
  - Boomers: 56%

**Online Media Trusted Most with Personal Data**

- **Online Websites**
  - Gen Z: 17%
  - Millennials: 16%
  - Gen X: 15%
  - Boomers: 15%

- **Social Media**
  - Gen Z: 30%
  - Millennials: 25%
  - Gen X: 13%
  - Boomers: 11%

- **Personal Blogs**
  - Gen Z: 8%
  - Millennials: 5%
  - Gen X: 8%
  - Boomers: 5%

- **Online News with a political inclination**
  - Gen Z: 4%
  - Millennials: 5%
  - Gen X: 8%
  - Boomers: 7%

**Generations German Results (August 2019)**

Base: All respondents (1,023)
q38 - Which of the following mediums would you trust most with your personal data in return for a more tailored and enjoyable consumer experience?
Gen Z is seen as far more susceptible to online manipulation than other generations

Which generation do you think is most easily influenced or manipulated online?

- **Gen Z**: 55%
- **Millennials**: 48%
- **Gen X**: 24%
- **Boomers**: 14%
- **Own Generation**: 13%
- **Traditionalists**: 10%

Generations German Results (August 2019)
Base: All respondents (n=1,202)
q34 - Which generation do you think is most easily influenced or manipulated online?
All generations believe that more education is needed for both children and retirees on the dangers of personal data loss and protection and can't rely on politicians to create laws to do so.

- Low trust that politicians will create laws to protect personal data
- Older generations think politicians are too corrupt to legislate effectively
- Younger generations think that politicians are too out-of-touch and slow to legislate effectively

### Need More Investment in Education About Personal Data

- **For Children**: 89%
- **For Retirees**: 91%

### Do you trust politicians to protect data?

- No. The lobbyists have them in their pocket.
  - Gen Z: 20%
  - Millennials: 28%
  - Gen X: 26%
  - Boomers: 37%

- No. They are too out-of-touch and don't understand how technology works well enough...
  - Gen Z: 27%
  - Millennials: 25%
  - Gen X: 21%
  - Boomers: 25%

- No. The tech industry moves too fast so there is no point...
  - Gen Z: 25%
  - Millennials: 22%
  - Gen X: 30%
  - Boomers: 24%

- Yes. They understand the impact data has on elections, voting and democracy.
  - Gen Z: 15%
  - Millennials: 17%
  - Gen X: 14%
  - Boomers: 13%

- Yes. They know it is the right thing to do.
  - Gen Z: 5%
  - Millennials: 7%
  - Gen X: 6%
  - Boomers: 6%

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Generations German Results (August 2019)
Base: All respondents (1,202)
q32 – Do you believe we need to invest more in educating children in schools about the dangers involving personal data loss and protection?
q33 – Do you believe we need to invest more in educating retirees about the dangers involving personal data loss and protection?
q31 – Do you trust politicians to create laws that will protect personal data?
Social network use is fairly consistent across generations...although Facebook is used by less than half of Gen Z

<table>
<thead>
<tr>
<th>Top Three Social Networks</th>
<th>Gen Z</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>WhatsApp</td>
<td>80%</td>
<td>73%</td>
<td>67%</td>
<td>59%</td>
</tr>
<tr>
<td>Instagram</td>
<td>75%</td>
<td>66%</td>
<td>59%</td>
<td>48%</td>
</tr>
<tr>
<td>YouTube</td>
<td>68%</td>
<td>57%</td>
<td>37%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Generations German Results (August 2019)
q18 – Which social networks, forums, or messaging service(s) do you actively use today? Base: All respondents (1202)
...however the reasons for social network usage are generational

<table>
<thead>
<tr>
<th>Social Network Purpose</th>
<th>Gen Z</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Get news - it's convenient to follow news sources on social media</td>
<td>47%</td>
<td>38%</td>
<td>34%</td>
<td>30%</td>
</tr>
<tr>
<td>To get news - I don’t trust or like mainstream media</td>
<td>19%</td>
<td>13%</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>To share pictures and updates with friends and family</td>
<td>37%</td>
<td>38%</td>
<td>33%</td>
<td>37%</td>
</tr>
<tr>
<td>Because all my friends do it's where we hang out, chat and have fun</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Get Inspired</td>
<td>9%</td>
<td>9%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Get advice, how-tos and to learn</td>
<td>21%</td>
<td>25%</td>
<td>25%</td>
<td>21%</td>
</tr>
<tr>
<td>Follow celebrities</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>To get involved in political debate about candidates or things that matter to me</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Expand professional network</td>
<td>13%</td>
<td>13%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>To influence and position myself as an ideas maker and creative generator</td>
<td>7%</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>To troll or comment</td>
<td>5%</td>
<td>5%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

- Younger generations use social networks to stay informed on their friends and pop culture
- Younger generations use social networks to interact with people outside their off-line network
- Younger generations are more likely to use social networks as a source of news
Younger generations are more open to interactions with companies on social media

Do you think there is a place for companies interacting with individual people on social networks, forums, and/or messaging sites?

60% Yes
- Generation Z
  More than 1/2 engage frequently with companies that place ads.

47% Yes
- Millennials
  2/5 engage frequently with companies that place ads.

43% Yes
- Generation X
  Less than 1/3 engage frequently with companies that place ads.

24% Yes
- Baby Boomers
  1/9 engage frequently with companies that place ads.

Generations German Results (August 2019)
Base: All respondents (1,202)
q23 – What are your primary reasons for using social networks, forums, and/or messaging services?
q24 – How often do you engage with companies that place ads on TV, radio, or online?
All generations most appreciate messages informed by previous purchases

**Ad Experiences**

<table>
<thead>
<tr>
<th>Most creepy</th>
<th>Most appreciated</th>
</tr>
</thead>
<tbody>
<tr>
<td>12%</td>
<td>Messages that are informed by your previous purchases</td>
</tr>
<tr>
<td>15%</td>
<td>Offers that pop up when you are in a specific location</td>
</tr>
<tr>
<td>14%</td>
<td>Content that reflects your beliefs and political leanings</td>
</tr>
<tr>
<td>9%</td>
<td>User or influencer generated videos that feature people wearing or using products you purchased</td>
</tr>
<tr>
<td>13%</td>
<td>Ads that show you what people in your friend network have bought</td>
</tr>
<tr>
<td>11%</td>
<td>Recommendations of influencers or people you don't personally know</td>
</tr>
<tr>
<td>11%</td>
<td>A surprise video just for you from a celebrity or brand ambassador</td>
</tr>
<tr>
<td>15%</td>
<td>Advertising creative that features people that look just like you in the copy or imagery</td>
</tr>
</tbody>
</table>

- Boomers and Gen X (29%) are more appreciative of ads informed by previous purchases than younger generations (19%)
- There is no consensus on the creepiest ad experience
Different generations have similar attitudes towards information sharing

- More than 80% of every generation is at least willing to provide their name
- Older generations are somewhat more likely to refuse to share any information at all

Generations German Results (August 2019)
Base: All respondents 1,022
q1 - Information you are willing to provide to a company you like?
q13 - Why unwilling to share personal data?
q15 - If you gave a brand your personally identifiable data like age, home address, what would you consider a great experience in return?
Ignorance is bliss for younger generations when it comes to personal data misuse

Worry About Personal Data

- No. I don't worry about my personal data.
  - Gen Z: 13%
  - Millennials: 13%
  - Gen X: 9%
  - Boomers: 7%

- A little. But I trust brands will do the right thing in most circumstances.
  - Gen Z: 26%
  - Millennials: 26%
  - Gen X: 25%
  - Boomers: 25%

- Yes. But only in relation to leaks to criminals or things that may impact me financially.
  - Gen Z: 37%
  - Millennials: 33%
  - Gen X: 33%
  - Boomers: 34%

- Yes. I worry about how my data is used but only in relation to politics and the news I receive from media sources/foreign operatives.
  - Gen Z: 16%
  - Millennials: 13%
  - Gen X: 12%
  - Boomers: 11%

- Yes. I worry about how my data is used all the time.
  - Gen Z: 15%
  - Millennials: 21%
  - Gen X: 23%
  - Boomers: 23%

- Younger generations worry less about their data
- 58% of Gen Z and 50% of Millennials are unaware of news stories about personal data misuse or think the stories are inflated or manufactured (35% for Boomers)
- Most concern about data is for the personal consequences of data misuse, not political concerns
No one is willing to let companies off the hook for bad ad placement...

- Younger generations place more blame on brands and websites
- Older generations assign blame equally
...and few would go as far as boycotting a company as a result

Would boycott after seeing content you don’t like or appreciate alongside other companies’ ads

15% Yes

23% Yes

28% Yes

39% Yes

Generation Z

Could they be won back?

11% never
38% public apology
27% personal apology

Millennials

20% never
36% public apology
27% personal apology

Generation X

25% never
39% public apology
20% personal apology

Baby Boomers

26% never
38% public apology
20% personal apology

Generations German Results (August 2019)
Base: All respondents (1,202)
q36 – After seeing the content mentioned in the previous question, what impact would it have on you?
q37 – What would the company have to do to win you back? Base: Would take action (1,038)