2019
GLOBAL STUDY
UNLOCKING THE POWER OF CULTURE & TRENDS
THE 10TH EDITION
OF UM’S WAVE

• An online survey of 56,398 active internet users in 81 countries
• All surveys are self-completed. The data collected is purely quantitative
• Active Internet Users are those who use the internet every day or every other day
• They drive adoption of platforms and tools and they will determine which tools and platforms become dominant
WE SPOKE TO PEOPLE ALL OVER THE WORLD

56,398 respondents
44 languages
81 countries
1.7BN active internet users worldwide

Albania*
Algeria
Argentina
Australia
Austria
Azerbaijan
Bahrain
Belgium
Bosnia & Herzegovina
Brazil
Bulgaria
Canada
Chile
China
Colombia
Costa Rica
Croatia
Czechia
Denmark
Dominican Republic
Ecuador
Egypt
El Salvador
Estonia
Finland
France
Germany
Greece
Guatemala
Honduras
Hong Kong
Hungary
India
Indonesia
Ireland (ROI)
Israel
Italy
Japan
Kazakhstan*
Kenya
Kuwait
Latvia
Lebanon
Macedonia
Malaysia
Mexico
Montenegro*
Morocco
Netherlands
Nicaragua
Nigeria
Norway
Panama
Paraguay
Peru
Philippines
Poland
Portugal
Puerto Rico
Qatar
Romania
Russia
Saudi Arabia
Serbia
Singapore
Slovakia
Slovenia*
S. Africa
S. Korea
Spain
Sweden
Switzerland
Taiwan
Thailand
Tunisia
Turkey
Ukraine
UAE
UK
USA
Uruguay

*New for Wave X
WAVE X: TEN YEARS OF

ROLE OF PLATFORMS

SOCIAL IMPACT

MOMENTS

CONTENT

INFLUENCERS

MOTIVES

BRAND RELATIONSHIPS

CONSUMER VALUE "EXCHANGE"

WAVE X REMIX CULTURE
ARE WE IN A CULTURAL CRISIS?
WE INVESTIGATED THE BIG SHIFTS IN CULTURE

IS TRUST IN DECLINE?

HOW ARE EVENTS IMPACTING IDENTITY?

HOW HAS PROXIMITY (SPACE & TIME) AFFECTED THE SPREAD OF CULTURE?
OVER THE LAST 5 YEARS, WE’VE LOST 8%

(GLOBAL DECLINE)

Q39 below are a list of statements, please can you answer reflecting your opinion [Any Agree]
Agreement with “I’m influenced by opinions shared online” declined 8% from Wave 8 to Wave X

Wave 5 2010
Wave 6 2011
Wave 7 2013
Wave 8 2014
Wave 9 2017
Wave X 2019

I’m influenced by opinions shared online
I trust bloggers/vloggers’ opinions on products & services
AND THIS EROSION OF TRUST IS CONSISTENT IN EVERY PART OF THE WORLD

36% 35% 44% 47% 54% 41%
27% 26% 33% 37% 45% 36%

51% 43% 45% 48% 39% 32%
41% 36% 39% 30% 30% 26%

61% 69% 70% 68% 66% 54%
49% 56% 57% 56% 53% 47%

I’m influenced by opinions shared online
I trust bloggers/vloggers’ opinions on products & services

Below are a list of statements, please can you answer reflecting your opinion [Any Agree]
WHILE TRUST IS DOWN, THE DESIRE TO BE CONNECTED HAS INCREASED

5%
BELONGING

Q46. Which of these online applications does a good job when you want to “Feel like I belong” [Any channel]
AND THIS NEED TO BELONG IS A GROWING GLOBAL FEELING

Q46. Which of these online applications does a good job when you want to “Feel like I belong” [Any channel]
WHEN STRIVING TO BELONG WE LOOK FOR SIMILARITIES

SOCIAL IDENTITY THEORY

GROUP MEMBERSHIP DRIVES ACTION

GROUP MEMBERSHIPS ARE NOT FIXED

SIMILARITY IS A STATE OF MIND
AS WE LOOK FOR SIMILARITIES WE NEED TO UNLOCK THE FACTORS THAT SHAPE OUR IDENTITY

9.3 FACTORS ARE VERY IMPORTANT IN DEFINING THE AVERAGE PERSON’S IDENTITY

C1: Please tell us, how important each one of the following is to your own sense of identity and in defining who you are today. Please use a scale of 1-10, where 1 is “not at all important” and 10 is “extremely important”. [8-10]
As we look for similarities we need to unlock the factors that shape our identity.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your health or fitness level</td>
<td>48%</td>
</tr>
<tr>
<td>Your family &amp; traditions</td>
<td>45%</td>
</tr>
<tr>
<td>What you do in your free time/your passions</td>
<td>45%</td>
</tr>
<tr>
<td>Your friends</td>
<td>45%</td>
</tr>
<tr>
<td>Your school, knowledge &amp; education</td>
<td>45%</td>
</tr>
<tr>
<td>Your language</td>
<td>38%</td>
</tr>
<tr>
<td>The country you were born in</td>
<td>37%</td>
</tr>
<tr>
<td>Your gender</td>
<td>35%</td>
</tr>
<tr>
<td>How you look</td>
<td>34%</td>
</tr>
<tr>
<td>Your age group or life stage</td>
<td>31%</td>
</tr>
<tr>
<td>Where you live</td>
<td>30%</td>
</tr>
<tr>
<td>Your neighbourhood</td>
<td>30%</td>
</tr>
<tr>
<td>A belief in the importance of science/evidence</td>
<td>29%</td>
</tr>
<tr>
<td>Specific social issues or responsibility</td>
<td>28%</td>
</tr>
<tr>
<td>Your sexual orientation</td>
<td>27%</td>
</tr>
<tr>
<td>Your current/previous occupation</td>
<td>27%</td>
</tr>
<tr>
<td>Your culture’s history/folklore</td>
<td>26%</td>
</tr>
<tr>
<td>Your race or ethnicity</td>
<td>25%</td>
</tr>
<tr>
<td>Your personal religious beliefs/faith</td>
<td>25%</td>
</tr>
<tr>
<td>Your social class</td>
<td>23%</td>
</tr>
<tr>
<td>Your personal political beliefs</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: Wave X - Remix Culture. Base: Netherlands

C1. Please tell us, how important each one of the following is to your own sense of identity and in defining who you are today. Please use a scale of 1-10, where 1 is “not at all important” and 10 is “extremely important”. [8-10]
CLUSTERS SHOW HOW REGIONS & COUNTRIES MOST PROMINENTLY ALIGN AND SELF IDENTIFY

CORRESPONDENCE MAP BY COUNTRY

C3. People define their individual identity in different ways. Please tell us, how important each one of the following is to your own sense of identity and in defining who you are today (extremely important). (Excluding Sexual Orientation and Political Beliefs as not asked in all markets)
CULTURAL INFLUENCE IS DRIVEN BY PROXIMITY ... BOTH NEAR & FAR

Young people in Mexico are more inspired by the USA than their own country.


C6. Thinking about each of your interests, which other cultures inspire your own personal style and consumption preferences today? (All interests combined)
IN HEALTH & WELLNESS, US AND JAPAN LEAD – BALANCING WESTERN & EASTERN INFLUENCE

In-depth data is shown for your market on the next slide.


C6. Thinking about each of your interests, which other cultures inspire your own personal style and consumption preferences today? (Health & Wellness)
16-34 YR-OLDS ARE TIME TRAVELLERS AND DRAW INSPIRATION FROM MANY DECADES

DECADES THAT INFLUENCE AUDIENCES, BY AGE


C8. Switching gears to pop culture and thinking about everything from music and movies, to clothing and cars, which of the following decades would you say influences your attitudes, beliefs and behaviours (e.g. your music, fashion, etc.) today?
Q24. WHICH OF THE FOLLOWING STATEMENTS DO YOU THINK DESCRIBE EACH OF THE PLATFORMS BELOW?

High Discovery/Low Influence

Introduces Me to Cultural Trends

Influences World Opinion

Low Discovery/Low Influence

Low Discovery/High Influence

High Discovery/High Influence

Source: Wave X - Remix Culture. Base: Netherlands
Q24 You may think that a platform can be described by more than one statement or that each statement can be used to describe more than one platform. Select all that apply.
OUR PLAYBOOK TO NAVIGATE

VISION

CULTURAL MAPPING

GLOBAL STUDY
Remix Culture/Wave X

REMIX BRAND SURVEYS
Custom study

MOMENTS TOOL
Remix Culture Pillars

APPROACH

GLOBAL TRENDS NETWORK
Cultural REMixologist

INSPIRATION

REMIX CULTURE

Coke

US Brand/Category Customization
J&J/Beauty | CVS/Health
Amex/Financial | Quicken/Mortgage
THE REMIX CULTURE: 4 PILLARS

**RESIST**
STANDING UP FOR SOMETHING

**RETROGRADe**
AUTHENTICITY & NOSTALGIA

**RECREATE**
MIXING UP TO DISRUPT

**REGLOCALIZE**
GLOBAL REACH & LOCAL CONNECTIONS

Source: Wave X – Remix Culture
MARKET ANALYSIS: EACH PILLAR HAS VARYING LEVELS OF INFLUENCE ACROSS MARKETS
REMIX CULTURE – 4 PILLARS BY AGE

16-24
- RESIST

25-34
- RETROGRADE

35-44
- REGLOCALIZE

45-54
- RECREATE

Cultural Pillars - Index vs. Age Groups
CASE STUDIES:

REMIX CULTURE
MUSIC ANALYSIS: AGE 16-24

PASSIONS THAT DEFINE ME
(Top 3 out of 6 discriminating passions vs. All Adults)

- MUSIC (62% vs. 52%)
- VIDEO GAMES (44% vs. 29%)
- SOCIAL MEDIA (36% vs. 29%)

HOW THEY REMIX RAP/HIP-HOP MUSIC

- RESIST
- RETROGRADE
- RECREATE
- REGLOCALIZE

Source: Wave X – Remix Culture. Base: USA
Audience: 16-24 *Hip-Hop Music fans defined as those who say Music helps define them and follow any of these music genres: Rap/Hip-hop, Reggaeton, R&B
MUSIC CASE STUDY
SPRITE - RAP CAVIAR/BREAKTHROUGHS
MIXING UP TO DISRUPT

STANDING UP FOR SOMETHING

AUTHENTICITY & NOSTALGIA

GLOBAL REACH & LOCAL CONNECTION

RECREATE

REMIX CULTURE

RESIST
MIXING UP TO DISRUPT

STANDING UP FOR SOMETHING

RECREATE
MIXING UP TO DISRUPT

RETOGRADE
AUTHENTICITY & NOSTALGIA

REMIX
CULTURE

REGLOCALIZE
GLOBAL REACH & LOCAL CONNECTION
1. **RESIST**
   STANDING UP FOR SOMETHING

2. **RECREATE**
   MIXING UP TO DISRUPT

3. **RETOGRADE**
   AUTHENTICITY & NOSTALGIA

4. **REGLOBALIZE**
   GLOBAL REACH & LOCAL CONNECTION
<table>
<thead>
<tr>
<th>RESIST</th>
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</tr>
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<tbody>
<tr>
<td><strong>STANDING UP FOR SOMETHING</strong></td>
<td><strong>AUTHENTICITY &amp; NOSTALGIA</strong></td>
</tr>
<tr>
<td><img src="image1" alt="Image" /> - “Believe in something. Even if it means sacrificing everything.”</td>
<td><img src="image2" alt="Image" /> - Retrograde style, mixing and matching logos</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>RECREATE</th>
<th>REGLOCALIZE</th>
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<td><strong>MIXING UP TO DISRUPT</strong></td>
<td><strong>GLOBAL REACH &amp; LOCAL CONNECTION</strong></td>
</tr>
<tr>
<td><img src="image3" alt="Image" /> - Nike logo with “Just do it.”</td>
<td><img src="image4" alt="Image" /> - Local store with global brands</td>
</tr>
</tbody>
</table>
REMIX CULTURE

1. RESIST
STANDING UP FOR SOMETHING

2. RETROGRADE
AUTHENTICITY & NOSTALGIA

3. RECREATE
MIXING UP TO DISRUPT

4. REGLOCALIZE
GLOBAL REACH & LOCAL CONNECTION
**Toy Category**

- RESIST
  STANDING UP FOR SOMETHING

- RETROGRADE
  AUTHENTICITY & NOSTALGIA

- RECREATE
  MIXING UP TO DISRUPT

- REGLOCALIZE
  GLOBAL REACH & LOCAL CONNECTION

Source: UM Research
Toys Category

*RESIST*
STANDING UP FOR SOMETHING

*RECREATE*
MIXING UP TO DISRUPT

*RETROGRADE*
AUTHENTICITY & NOSTALGIA

*REGLOCALIZE*
GLOBAL REACH & LOCAL CONNECTION

Source: UM Research
Toys Category

Barbie
LOL Surprise!

MIXING UP TO DISRUPT

STANDING UP FOR SOMETHING

AUTHENTICITY & NOSTALGIA

STANDING UP FOR SOMETHING

AUTHENTICITY & NOSTALGIA

Source: UM Research
REMIX CULTURE

1. RESIST
   STANDING UP FOR SOMETHING

2. RETROGRADE
   AUTHENTICITY & NOSTALGIA

3. REIMAGINE
   DOUBLE DOWN

4. RECREATE
   RE-MIXING UP TO DISRUPT

5. REGLOCALIZE
   DRIVE RELEVANCE

6. CREATE
   CONNEXIONS

Source: UM Research
THANK YOU