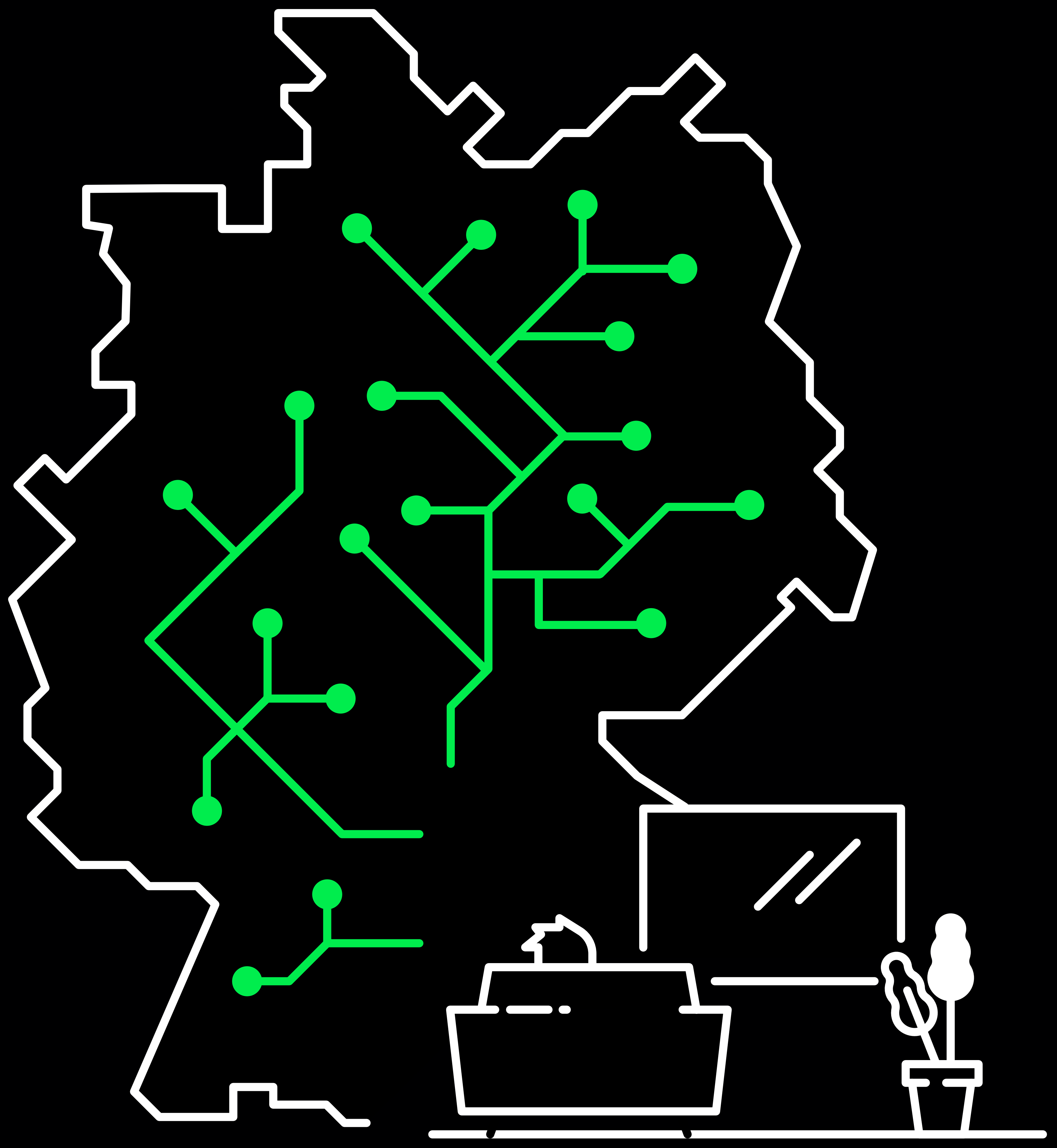
SYZYGY GROUP

The digitalisation of everyday life in post-pandemic Germany



And what it means for consumer brands

A **SYZYGY** Digital Insight Report

March 2022

Contents

Key findings: **state of the digital nation in Germany in 2022**

The SYZYGY Consumer Digitalisation Index 2022 survey provides a post-pandemic snapshot of the digitalisation of everyday consumer life in Germany. The fieldwork was conducted in February 2022, using a population-balanced sample of 1500 adults from the Momentive online consumer research panel.

75 %
SYZYGY Consumer Digitalisation Index*
Consumer life is more digitalised than ever, up 3% since the first 2020 pandemic lockdown.

59 %
Digital Optimism
59% of Germans believe a more digitalised life is a better life.

75 %
Digital Harms
Harm to mental health and relationship health are the two most important harms Germans associate with digitization.

66 %
Digital Connectivity
66% of German consumers feel ‘ permanently online, permanently connected’.

32 %
Digital Romance
32% of Germans met their most recent romantic partner online (56% for new relationships started since the pandemic).

75 %
Digital Impact
The most digitalised consumers rate their personal wellbeing 11% better than those with the least digitalised lives.

48 %
Digital Addiction
48% of Germans feel addicted to the digital technology in their lives. This rises to 75% for younger Gen Z consumers.

80 %
Digital Advertising
80% of Germans would remove digital ads from their screens if they could.

51 %
Digital Assistants
51% of Germans are now using digital assistants such as Alexa, Siri or Google Assistant.

63 %
Digital Satisfaction
63% of Germans are satisfied with their online interactions with brands, retailers and service providers.

#1
Digital Benefits
For Germans, the #1 benefit that digital can deliver is team and effort saving convenience.

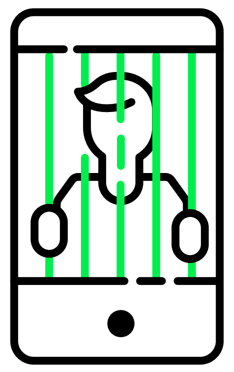
41 %
Digital Wellbeing
Overall, 41% of Germans feel they have an unhealthy relationship with the technology in their lives.

** See methodology section, p8.*

Key findings: **are Germans addicted to tech?**

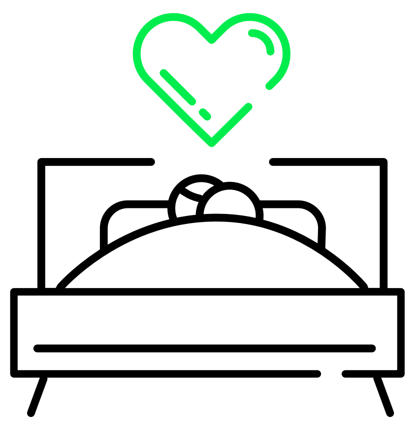
The SYZYGY Consumer Digitalisation Index 2022 survey found that nearly half of German adults feel addicted to the digital technology in their lives. This rises to 75% for younger Gen Z digital natives, born from 2012.

Consumer Digitalisation Index 2022 Germany



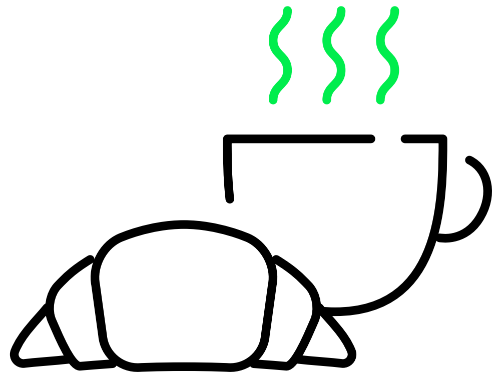
48%

of Germans say they feel addicted to the technology in their lives (75% or Gen Z)



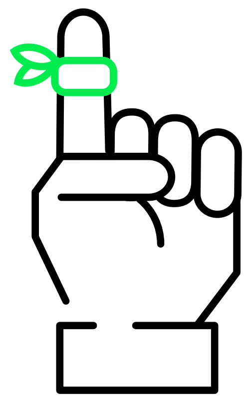
35%

of Germans would rather **give up sex for a month** than be be offline for a month (46% for Gen Z)



45%

of Germans would rather **give up breakfast** for a month than be be offline for a month (56% for Gen Z)



26%

of Germans would rather **have a broken finger** for a month, than have a broken phone for a month (42% for Gen Z)

Key recommendations for consumer brands

Our 2022 CDI data reveals key digital opportunities for brands as consumers emerge into a post-pandemic world.

1. **Double down on digital**
   As we move into a post-pandemic world, German consumers are unlikely to reduce their use and reliance on digital technology. Smart brands will adapt to consumer lives that are becoming ever-more digitalised.
2. **Embrace the 'always-on' mindset**
   Brands can profit from 24/7 digital connectivity in post-pandemic life by finding new ways to create value for consumers with a 'permanently online, permanently connected' mindset.
3. **Brand strategy, not digital strategy**
   With so many human relationships beginning online and then getting physical, the idea of digital as a standalone channel, solo or strategy is obsolete. Forget digital strategy, you'll need a digitally-infused brand strategy.
4. **Be a helpful voice**
   In a post-COVID world, expect screenless brand utility to thrive. The rapid adoption of digital voice assistants reveals the kind of relationship that Germans want with their digital technology; quick and easy assistance.
5. **Build digital optimism**
   Build digital optimism. Germans are upbeat about the positive potential of digital in a post-pandemic world. So focus on positive potential, purpose and pleasure, rather than obsessing with problems and pain points.
6. **Gen Z rules**
   In a post-pandemic world, brands will benefit by realigning their value propositions to the shifting expectations, norms and habits of the first generation of 'pure-play' digital natives - Generation Z.
7. **Invest in positive technology**
   In a post-pandemic world, brands can win by joining the 'positive technology' movement, and deploying tech designed to promote wellbeing help humans thrive.
8. **Deliver convenience-tech**
   Convenience is king when it comes to the difference that digital can make. Look for ways to save consumers time and effort; they'll be prepared to pay for the privilege.
9. **Promote mental & relationship health**
   Brands will benefit from implementing pro-active measures designed to mitigate digital harms, and in particular support the mental health and relationship health of consumers.
10. **Say no to addictive tech**
    Digital addiction is a contested idea, but it worries consumers. In a post-pandemic world, smart brands will avoid accusations of hijacking people's attention and time, and instead deliver quick and effortless value.
11. **We need to up our game on digital advertising**
    To combat ad avoidance, ad skipping, and ad blindness, consider reframing digital advertising from the consumer perspective. Rather than help brands interrupt and sell, help consumers buy better, by making ads helpful and informative, at the point of need.
12. **Promote digital wellbeing**
    Consumers want a healthier relationship with the technology in their lives in a post-COVID world. How can your brand help?

Executive summary Relationship status: It's complicated!

Germans love their digitalised lives, but want to spend less time online.

Our inaugural SYZYGY Consumer Digitalisation Index (CDI) finds that German lives are more digitalised than ever in 2022. Two thirds of German consumers now feel they are 'permanently online, permanently connected'.

For most Germans, this is a positive thing. Overall, it turns out that most consumers in Germany are digital optimists, believing digital can make a positive difference to their everyday lives. Most of all, consumers appreciate the pragmatic time and effort saving convenience that digital technology offers.

The post-pandemic opportunity for consumer brands is clear; double-down on delivering digital value in the increasingly digitalised lives. And the best place to start is with what matters most to consumers – ' convenience tech' – technology designed to save people time and effort.

But is tech *too* good? Despite widespread digital optimism, we found that many Germans now worry about the potential toxic effects of a hyper-digitalised life.

Specifically, half of all consumers in Germany worry about 'digital addiction'.

Digital addiction is a contested concept but many Germans feel that brands are using addictive technology to get them hooked, and that this can have a negative effect on their mental health and relationships. However, 69% of Germans believe consumers brands don't care about their digital wellbeing.

> “**69%** of Germans believe **consumer brands don't care about their digital wellbeing.**”

These insights represent both a challenge and an opportunity for consumer brands in a post-pandemic world. German consumers want all the benefits of digital technology, but without the screen time.
The solution is simple, but represents a radical mindset shift in how consumer brands can create and communicate value digitally in a post-pandemic world.

Consumer brands will win by making digital interactions quick and easy as possible, without hijacking people's time or attention. Maximum digital benefit, with minimum digital screen time. That's how consumer brands can make a positive difference to people's lives in post-pandemic Germany.

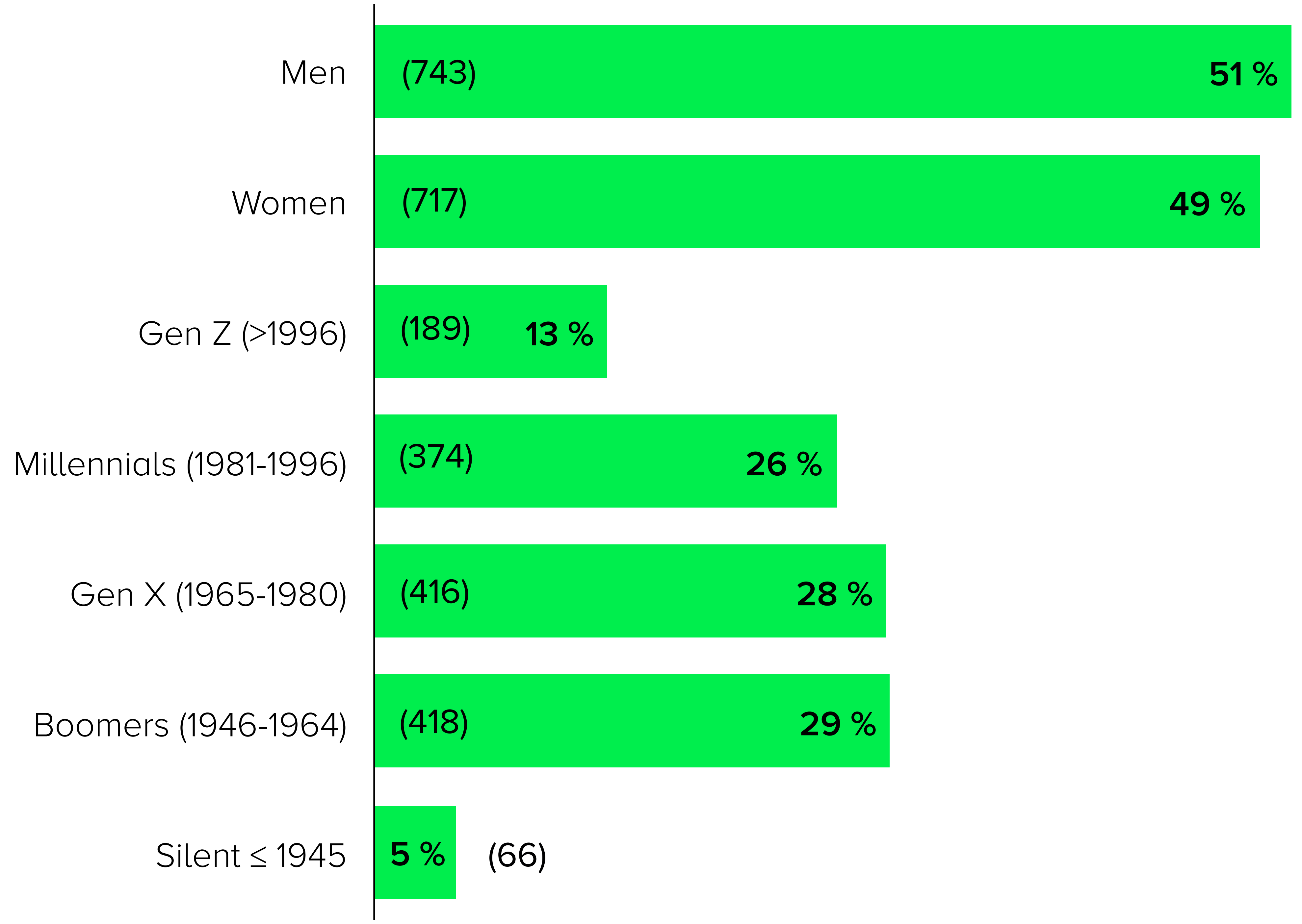
Methodology

The SYZYGY Consumer Digitalisation Index 2022 survey was conducted online in February 2022 using a population-balanced representative sample of 1500 adults from the online Momentive consumer research panel.

We used an attention and a speed check to ensure data quality, resulting in a validated sample of 1463 for analysis.

The data was analysed by the SYZYGY data analytics team using SPSS in February 2022. The report was authored by SYZYGY's consumer psychologist, Dr. Paul Marsden

Consumer Digitisation Index 2022
Validated sample



Methodological note How we measured consumer digitalisation

Consumer digitalisation
is a tricky concept to measure.

Some research, such as the excellent German D21 initiative, uses complex technocentric measures of digitalisation based on aggregating various different indicators into a single score. These include levels of public access and openness to different digital technologies, along with use and mastery of these digital technologies[1]. These aggregate measures of digitalisation are powerful, but can be time-consuming and costly to research, and difficult to interpret.

At SYZYGY, we wanted a simpler, more human-centric approach based on perceived levels of digitalisation. So, our Consumer Digitalisation Index (CDI) simply involves asking a representative sample of 1500 consumers about how digitalised everyday life feels to them, on a scale of 0-10. Our CDI is simply the average rating out of 10, expressed as a percentage of possible highest score.

Because ‘digitalisation’ is techno-jargon, we provided respondents with a short jargon-free encyclopaedia definition of digitalisation as: “the integration of digital technologies into everyday life”, including the use of digital devices and online media.[2]

To make this definition more meaningful, we also specified that when digital technologies are fully integrated into everyday life, people feel they are *permanently online and permanently connected*.[3]

Finally, in the spirit of exploration, we added a series of follow-up questions to illustrate the extent of digitalisation in
people’s everyday lives.

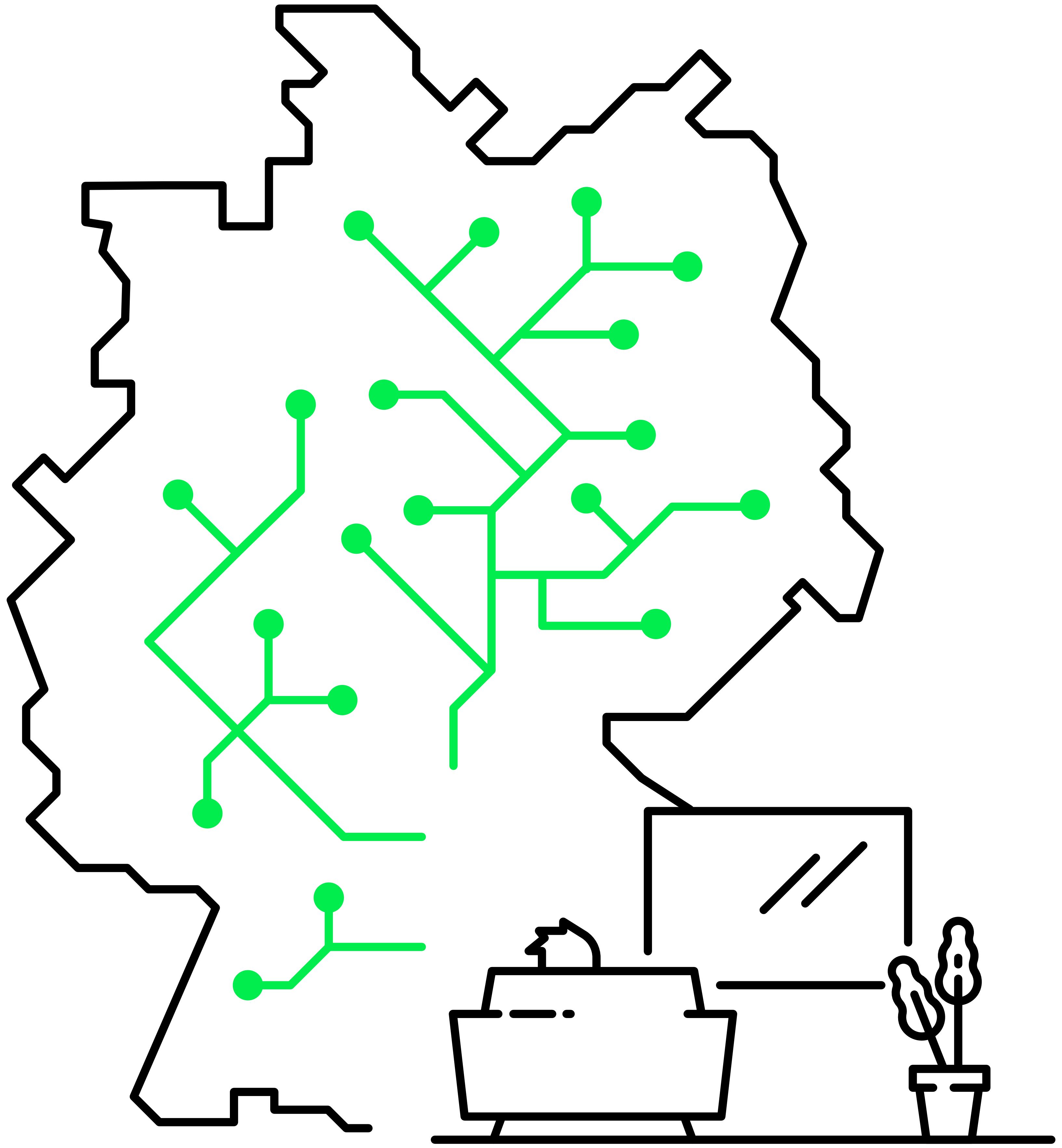
This resulting CDI is imperfect and incomplete, but it provides a quick and easy indicator that gauges how digitalised people feel their digital lives are today. The utility of the CDI is that is is quick and easy to track it over time and use in data analytics to identify the causes and consequences of perceived digitalisation. We hope that what the CDI lacks in granularity, it makes up for in ease, simplicity, and practicality.

75%

Consumer Digitalisation Index 2022 Germany

1. Initiative D21 (2021) D21 Digital Index 21/22 https://initiatived21.de IISBN: 978-3-9821601-5-3
2. Ochs, T. & Riemann, U.A. (2017) ‘Digtilization’ entry in Encyclopaedia of Information Science and Technology, Fourth Edition, IGI Global.
3. Vorderer, P., Hefner, D., Reinecke, L., & Klimmt, C. (Eds.). (2017). Permanently online, permanently connected. Routledge, Taylor & Francis Group.

Survey **results**



SYZYGY Consumer Digitalisation Index 2022

Overall, the SYZYGY consumer digitalisation index (CDI) rates the level of integration of digital technology into everyday German lives today at 75%.

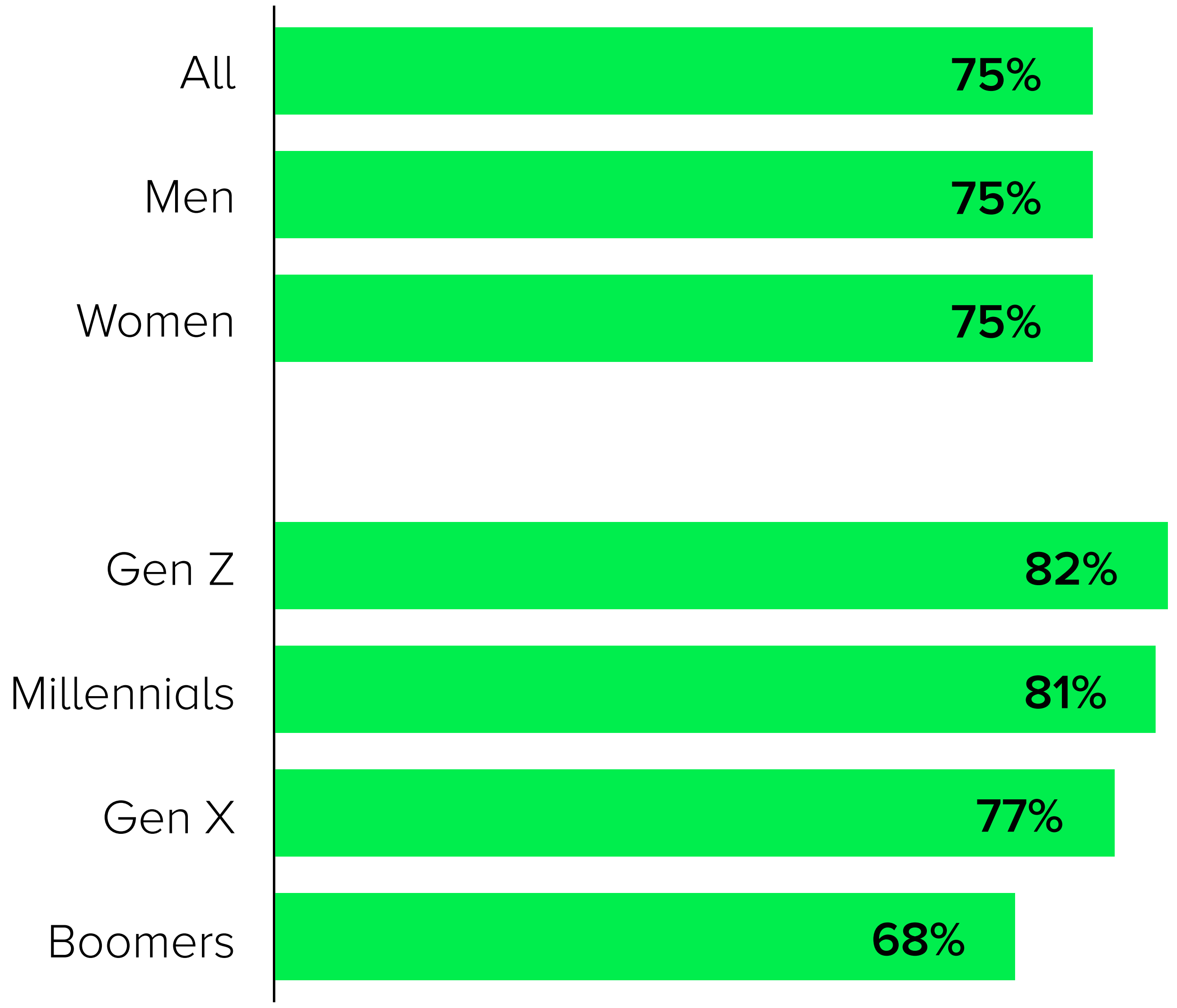
This is up 3% since the first pandemic lockdown in 2020.

Overall, consumers do not expect their everyday lives to become any less digitalised once the pandemic ends.

What this means for consumer brands

Double down on digital. As we move into a post-pandemic world, German consumers are unlikely to reduce their use and reliance on digital technology. **Smart brands will adapt to consumer lives that are becoming ever-more digitalised.**

On a scale of 0-10, how 'digitalised' does your daily life feel to you these days?



1. "Digitalisation means 'the integration of digital technologies into your everyday life', including the use of digital devices and online media. When digital technologies are fully integrated into everyday life, people feel permanently online and permanently connected"
2. CDI (Consumer Digitalisation Index) = mean score out of 10 represented as a percentage (100% = digital technologies fully integrated into everyday life, 0% = digital technologies not at all integrated into everyday life.

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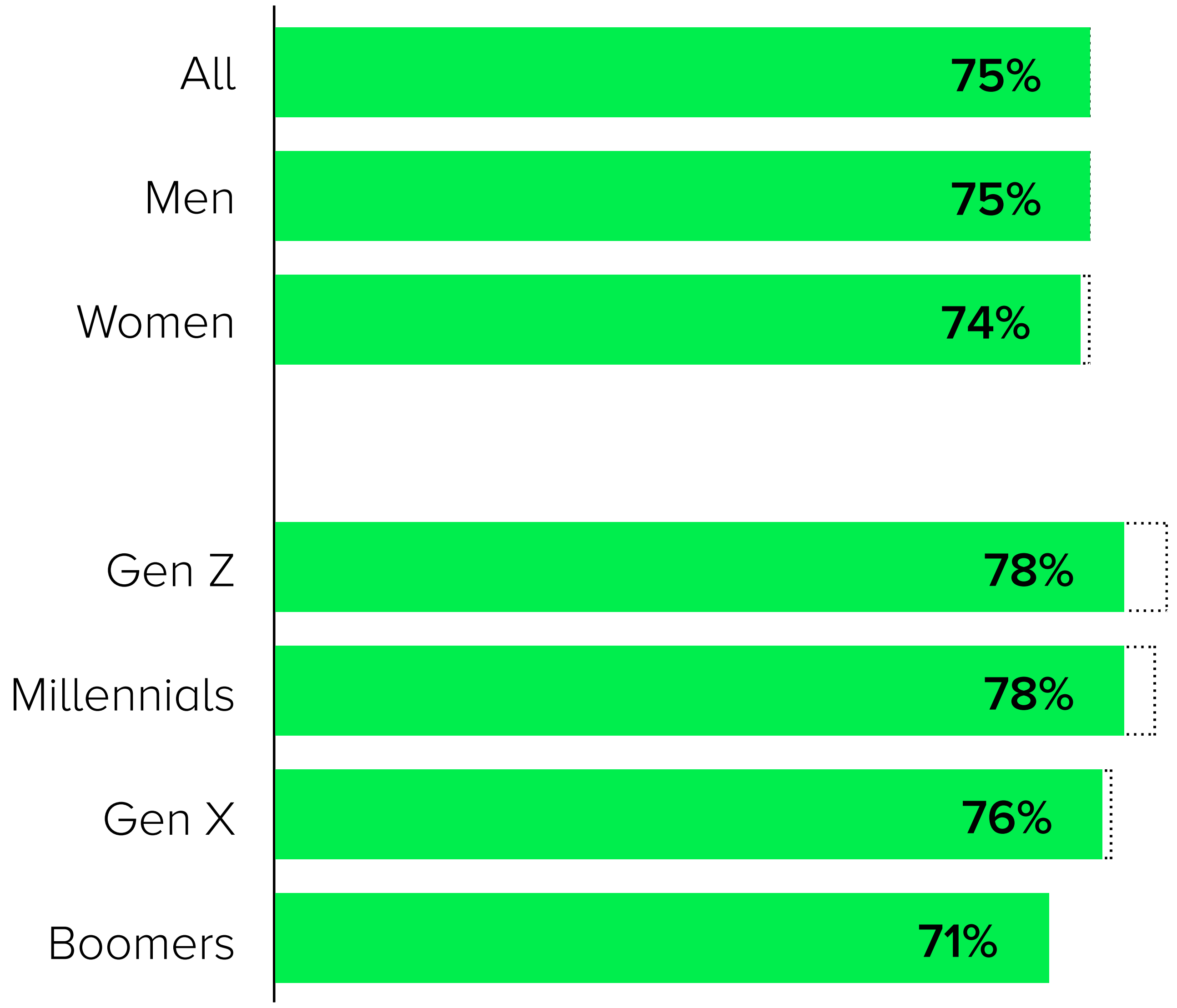
On a scale of 0-10 how 'digitalised' do you expect your daily life to be in the future, one year after the pandemic finally ends?



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Digital connectivity

66% of Germans now feel they are ‘permanently online, permanently connected’.

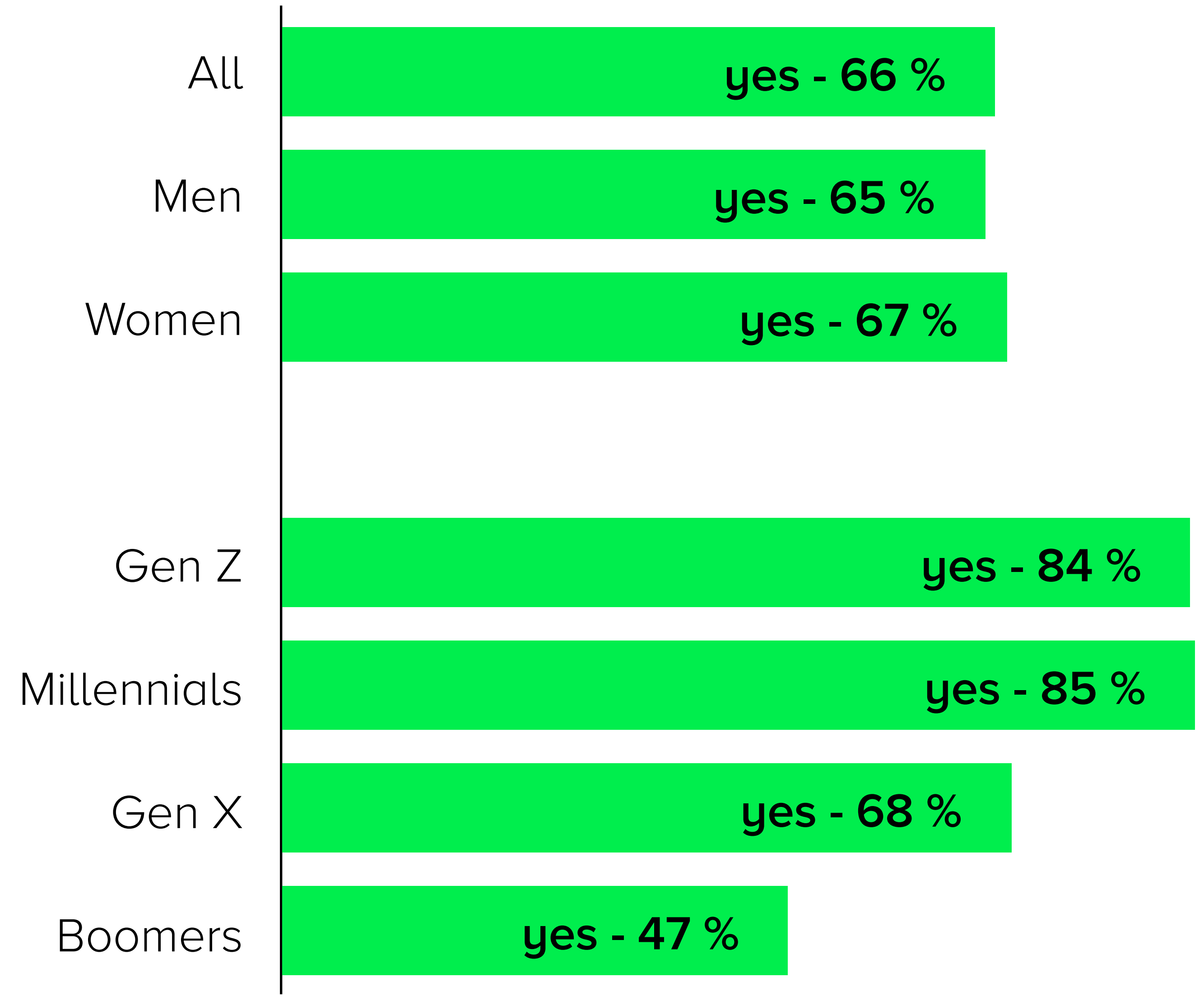
As would be expected, younger generations tend to be more connected than older generations, with 85% of Gen Z and Millennials feeling ‘ permanently online, permanently connected’.

Nevertheless, nearly half of older ‘Boomer’ consumers now experience this high level of digital connectivity.

What this means for consumer brands

Brands can profit from 24/7 digital connectivity in post-pandemic life by finding new ways to create value for consumers with a ‘permanently online, permanently connected’ mindset.

These days, do you feel you are ‘permanently online, permanently connected’?



Base: General population sample of 1500 adults aged 18-80+ in Germany. Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

Digital romance

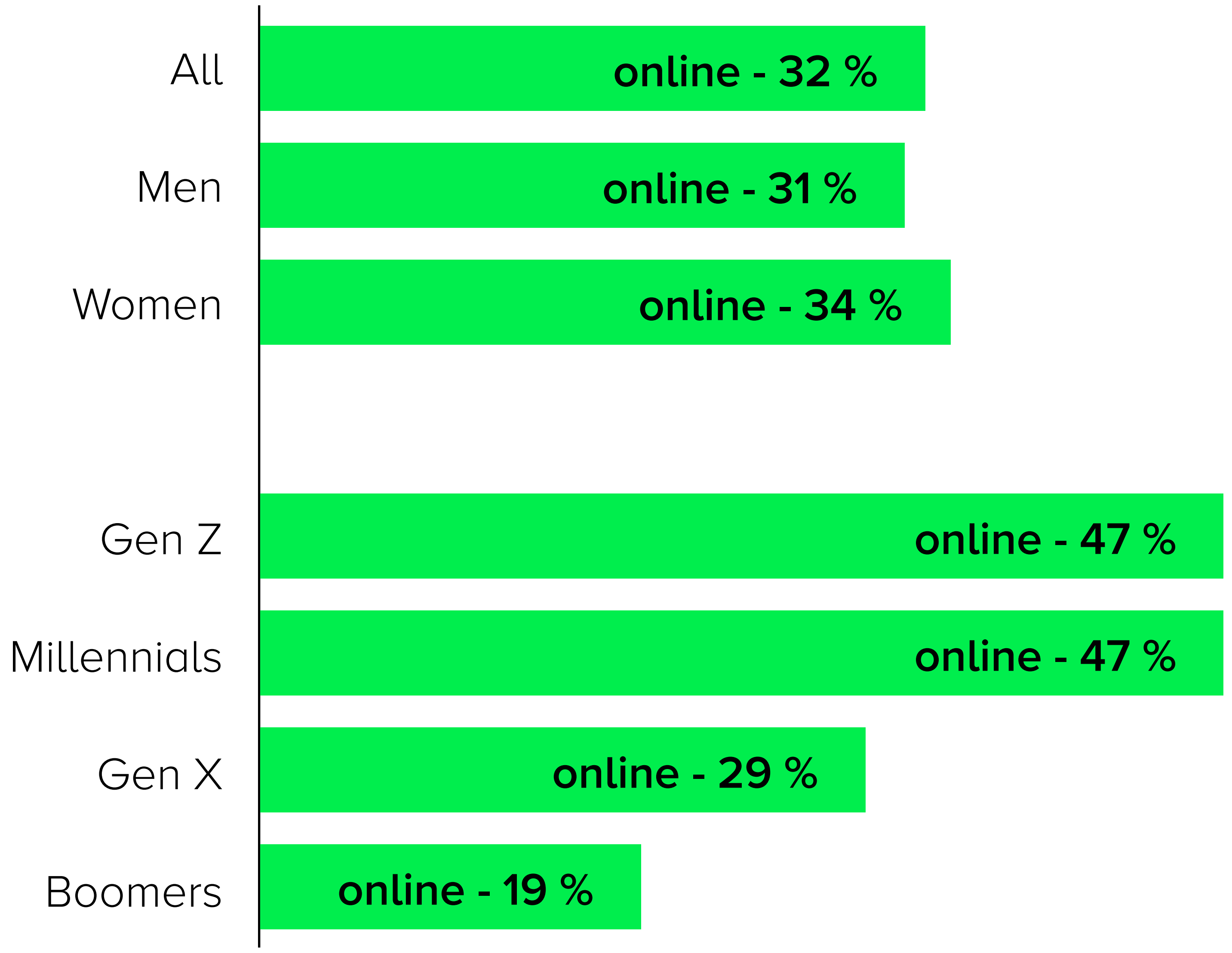
32% of Germans met their most recent romantic partner online. This rises to 56% for new romantic relationships that have begun since the pandemic.

As might be expected, this is higher for younger consumers of the Gen Z and Millennial cohorts, with one in two new romantic relationships now beginning online.

What this means for consumer brands

Brand strategy, not digital strategy.
With so many human relationships beginning online and then getting physical, the idea of digital as a standalone channel, solo or strategy is obsolete. Forget digital strategy, you'll need a digitally-infused brand strategy.

Thinking about your current (or most recent) romantic liaison or partner, how did you first meet this person? Online or in person?



Base: All who answered. General population sample of 1500 adults aged 18-80+ in Germany. Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

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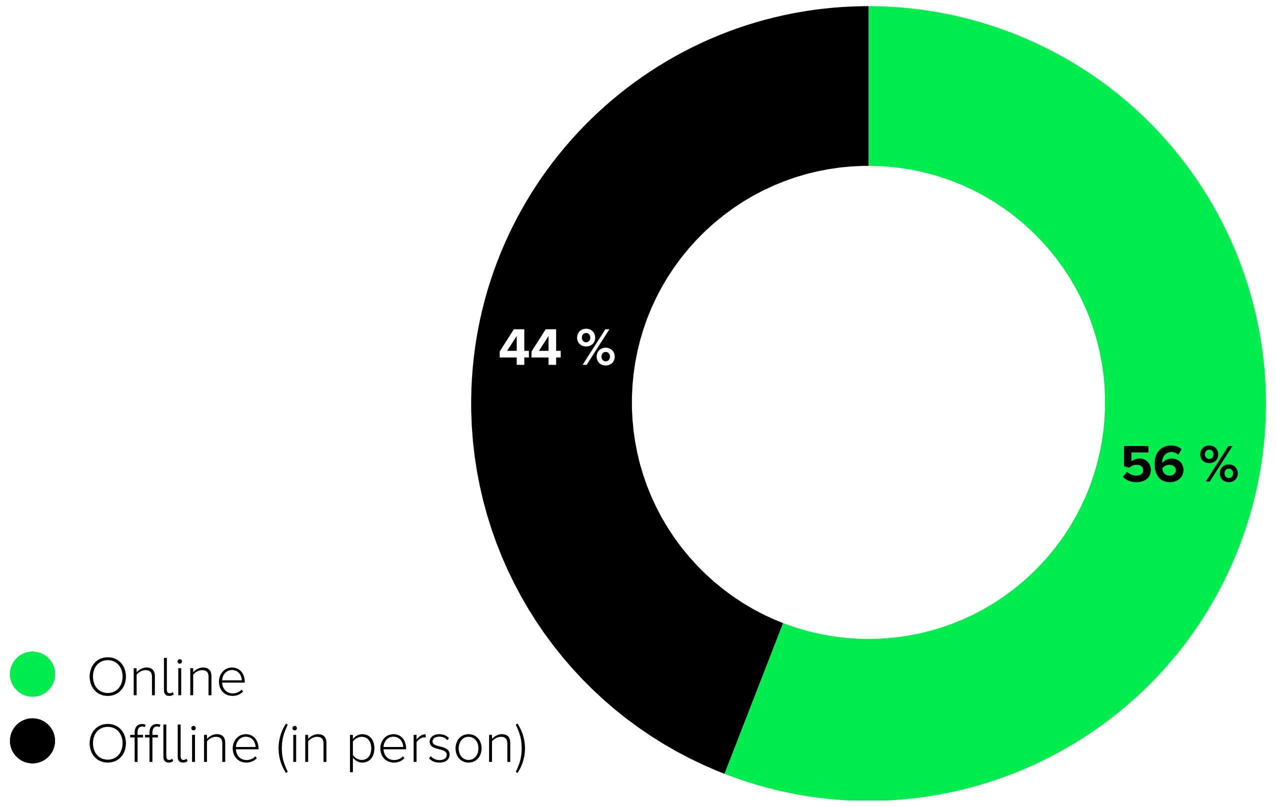
Thinking about your current (or most recent) romantic liaison or partner [since 2020], how did you first meet this person? Online or in person?

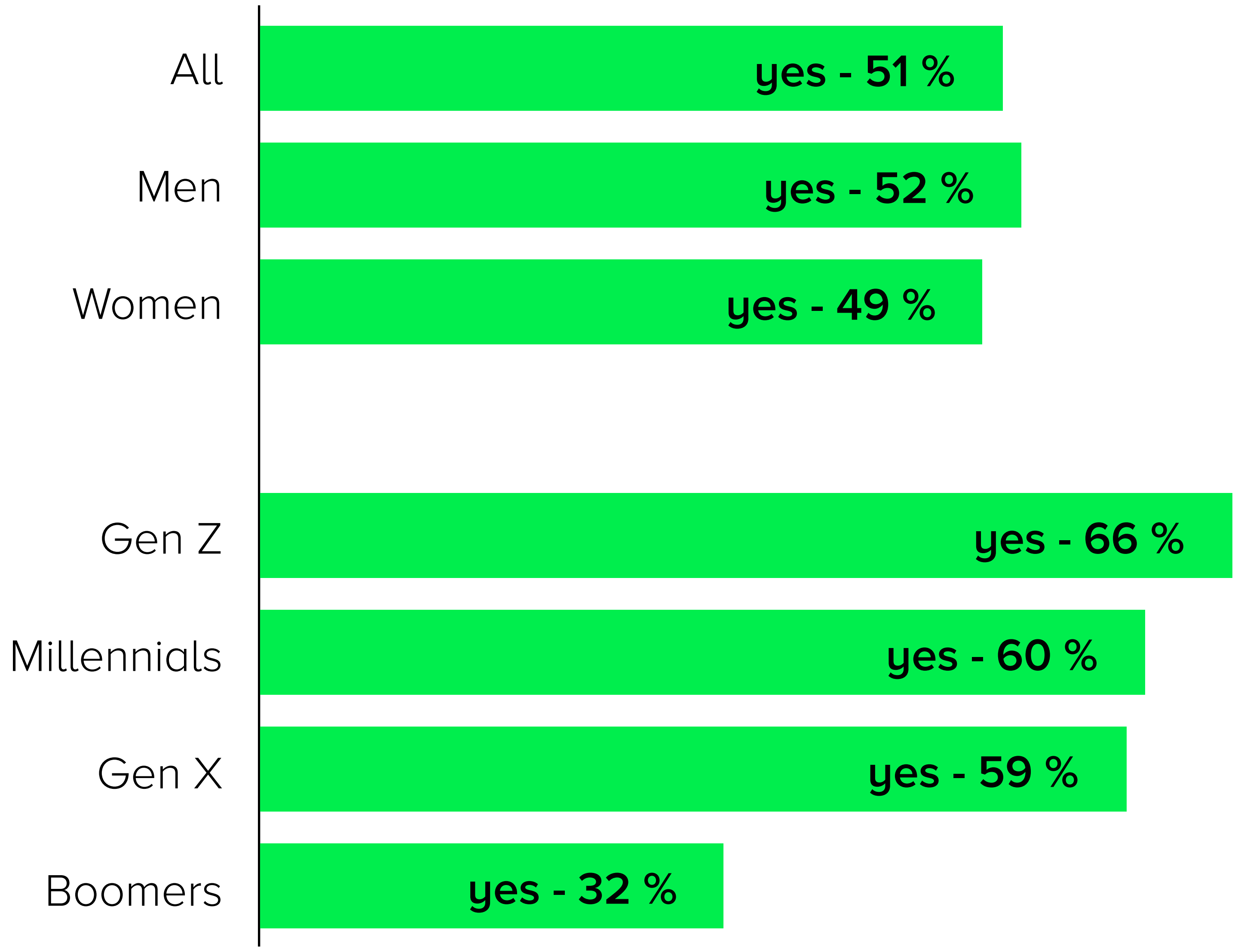


“ **56%** of Germans in new relationships since 2020 **first met their partner online.** ”

Digital assistants

51% of Germans are now using digital assistants such as Alexa, Siri or Google Assistant.

Do you currently use a digital assistant (e.g. Alexa, Siri, Google Assistant)?



Base: General population sample of 1500 adults aged 18-80+ in Germany. Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

What this means for consumer brands

Be a helpful voice. In a post-COVID world, expect screenless brand utility to thrive. The rapid adoption of digital voice assistants reveals the kind of relationship that Germans want with their digital technology; quick and easy assistance.

Digital optimism

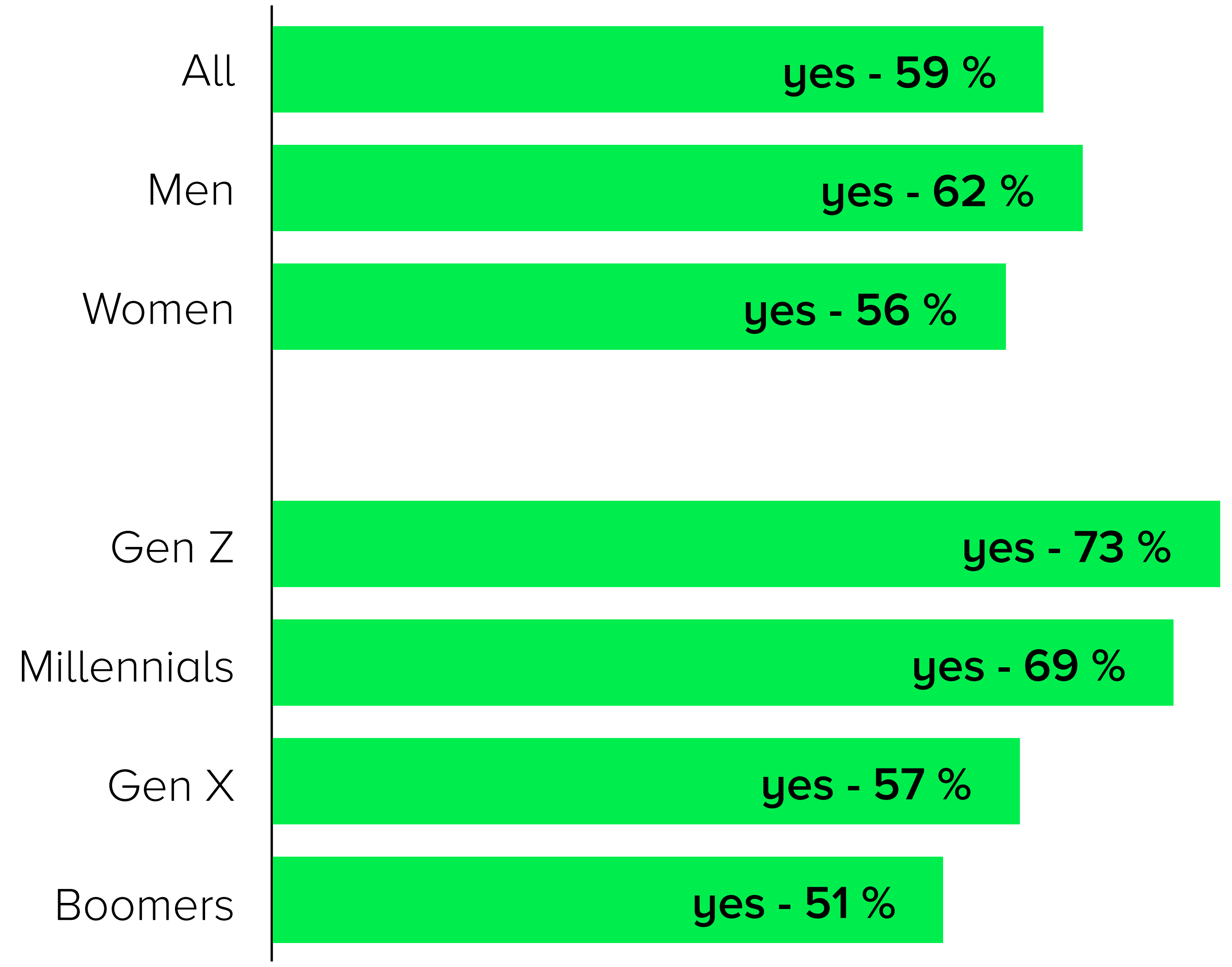
59% of Germans believe a more digitalised life is a better life.

Younger consumers tend to be more positive than older consumers about the positive difference that digital technology can have on their lives. But overall, all demographic groups in German are digital optimists!

What this means for consumer brands

Build digital optimism. Germans are upbeat about the positive potential of digital technology in a post-pandemic world. So focus on positive potential, purpose and pleasure, rather than obsessing with problems and pain points.

Overall, do you think a more digitalised life is a better life?



Base: General population sample of 1500 adults aged 18-80+ in Germany. Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

Digital impact

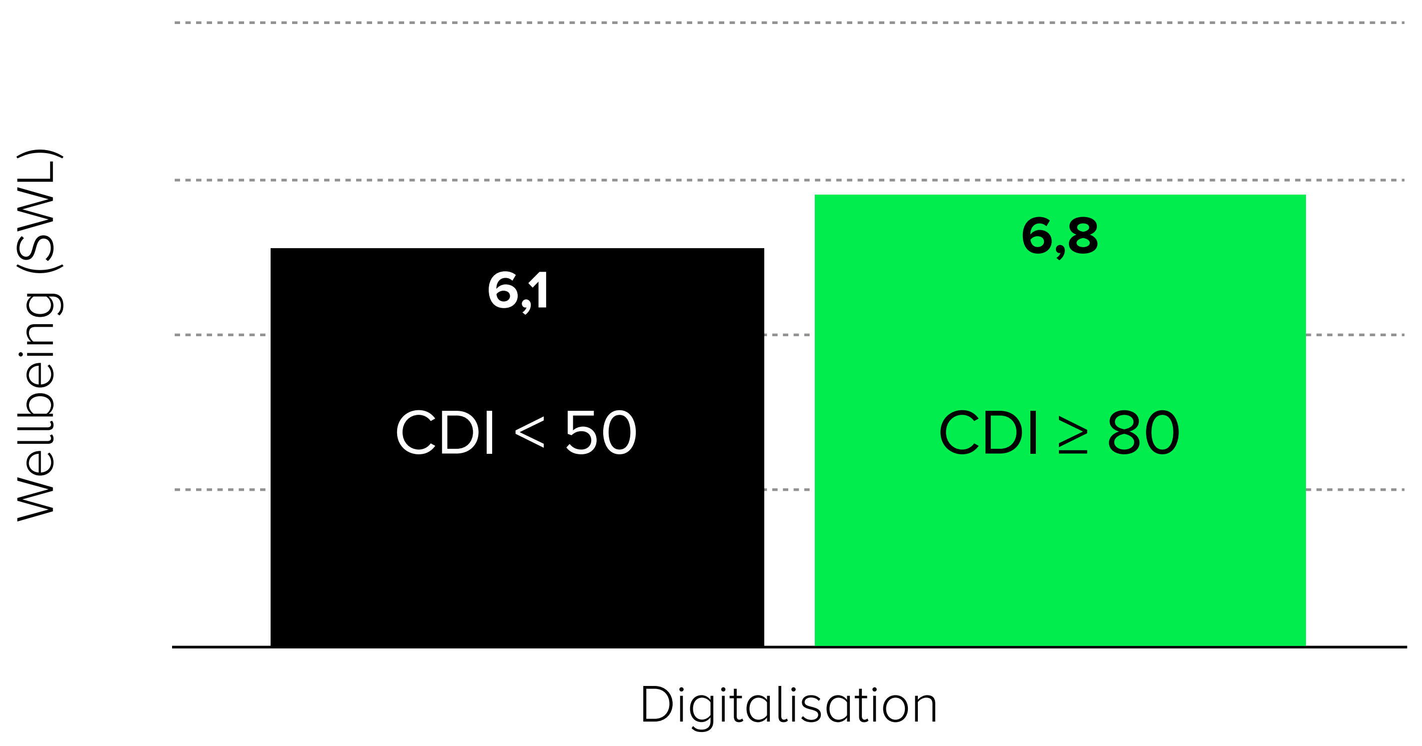
Increased levels of consumer digitalisation are associated with higher levels of consumer wellbeing, as per the standardised measure of satisfaction with life.

The most digitalised consumers rate their personal wellbeing 11% better than those with the least digitalised lives.*

What this means for consumer brands

Invest in positive technology. In a post-pandemic world, brands can win by joining the ‘positive technology’ movement, and deploying tech designed to promote wellbeing and help humans thrive.

Relationship between consumer digitalisation (CDI) and wellbeing (SWL)



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		Digitalisation (CDI)	Wellbeing (SWL)
Digitalisation (CDI)	Pearson Correlation	1	.145**
	Sig. (2-tailed)	-	<.001
	N	1463	1458
Wellbeing (SWL)	Pearson Correlation	.145**	100,0 %
	Sig. (2-tailed)	<.001	-
	N	1458	1458

* Correlation is significant at the 0.01 level (2-tailed).
NB statistical correlation does not mean causation, but is consistent with the idea that digital technology has supported wellbeing through the pandemic

Digital satisfaction

63% of Germans feel their digital interactions with brands, retailers and service providers are close to ideal.

However, our data suggests that a new generation of younger consumers may be more demanding and less satisfied than older demographics.

What this means for consumer brands

Gen Z rules! In a post-pandemic world, brands will benefit by realigning their value propositions to the shifting expectations, norms and habits of the first generation of 'pure-play' digital natives - Generation Z.

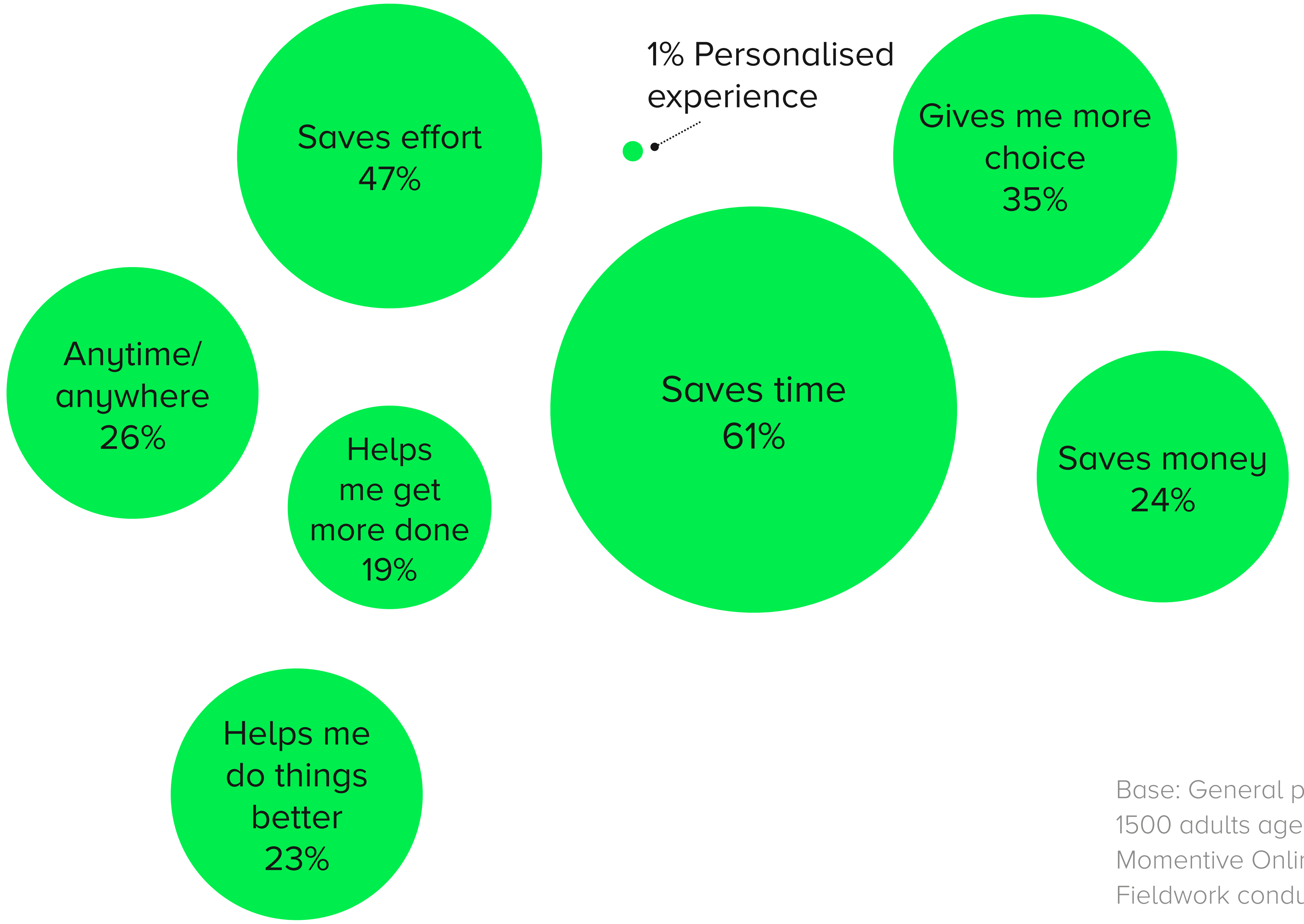
Thinking about your most recent online interaction with a brand, retailer or service provider, how close to ideal was this interaction?

Base: General population sample of 1500 adults aged 18-80+ in Germany. Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

Digital benefits

For Germans, the #1 most important benefit that digital can deliver is convenience.

For you personally, and overall, what are the top three benefits of more digital technology in your everyday life? (Most frequently cited benefits)



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What this means for consumer brands

Deliver convenience-tech.
Convenience is king when it comes to the difference that digital can make. Look for ways to save consumers time and effort; they'll be prepared to pay for the privilege.

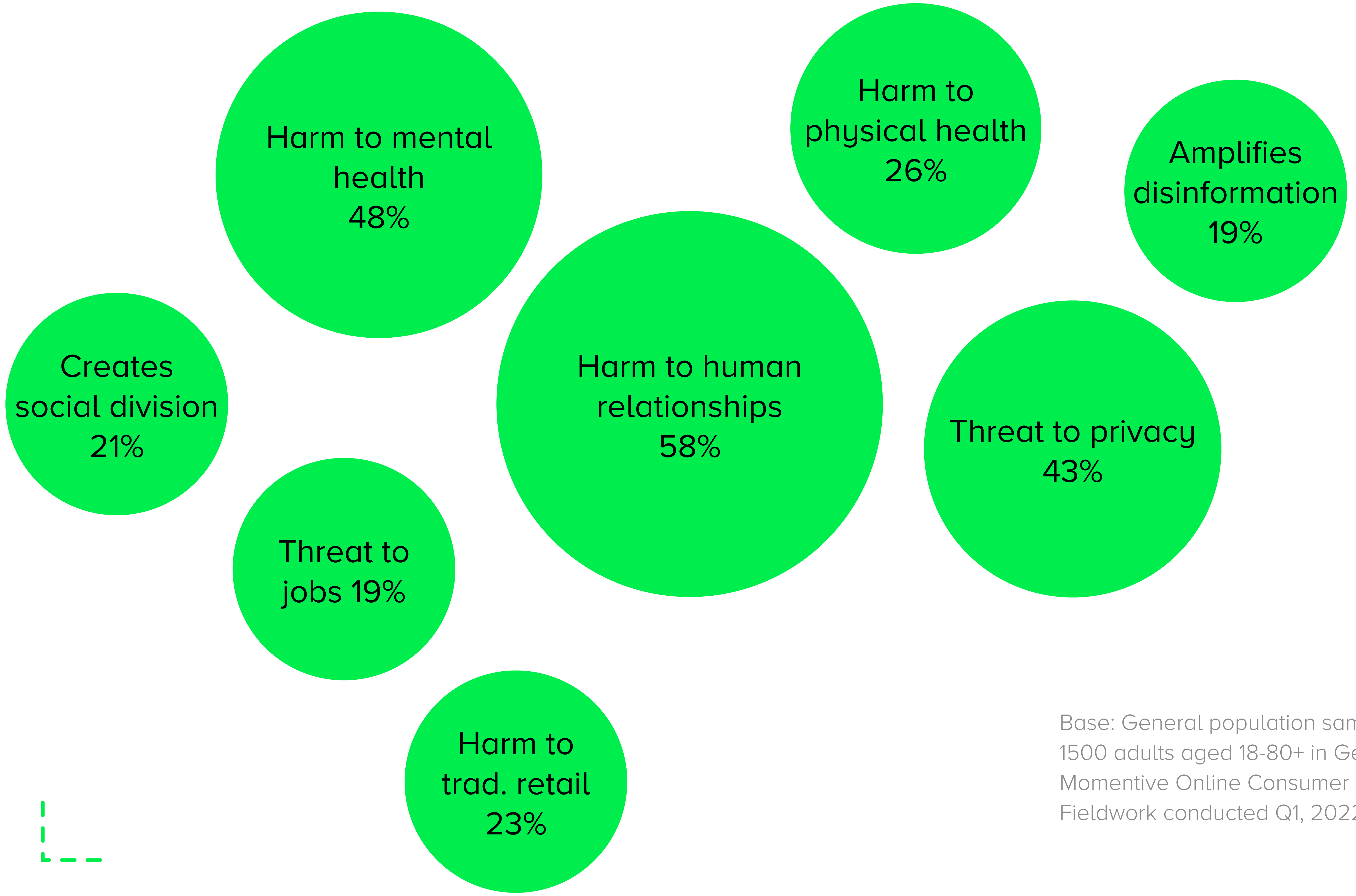
Digital harms

Harm to mental health and relationship health are the two most important harms associated with the digitalisation of everyday life.

What this means for consumer brands

Promote mental and relationship health. Brands will benefit from implementing pro-active measures designed to mitigate digital harms, and in particular support the mental health and relationship health of consumers.

8. For you personally, and overall, what are the top three hazards (harms, risks) of more digital technology in your everyday life?



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Digital addiction

48% of Germans feel addicted to the digital technology in their lives today. This rises to 75% for Gen Z.

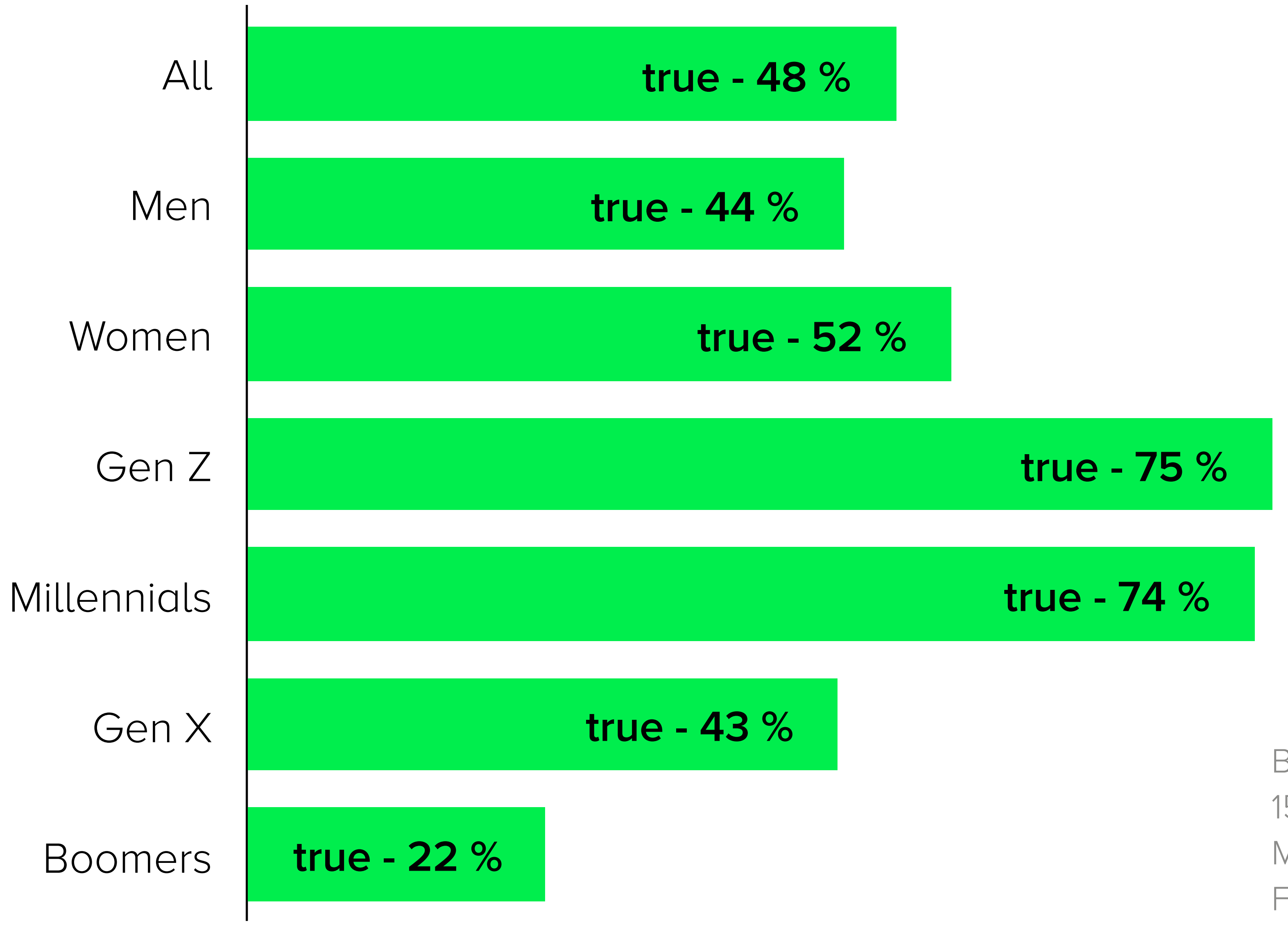
For example, 45% of Germans would rather give up breakfast for a month than be offline for a month. 35% would rather give up breakfast for a month, and 26% would rather have a broken finger than a broken phone for a month. These numbers rise considerably for younger generations.

Overall, 60% of Germans now feel they spend too much time online, rising to 81% for Gen Z.

What this means for consumer brands

Say no to addictive tech. Digital addiction is a contested idea, but it worries consumers. In a post-pandemic world, smart brands will avoid accusations of hijacking people's attention and time, and instead deliver quick and effortless value.

Thinking about your most recent online interaction with a brand, retailer or service provider, how close to ideal was this interaction?



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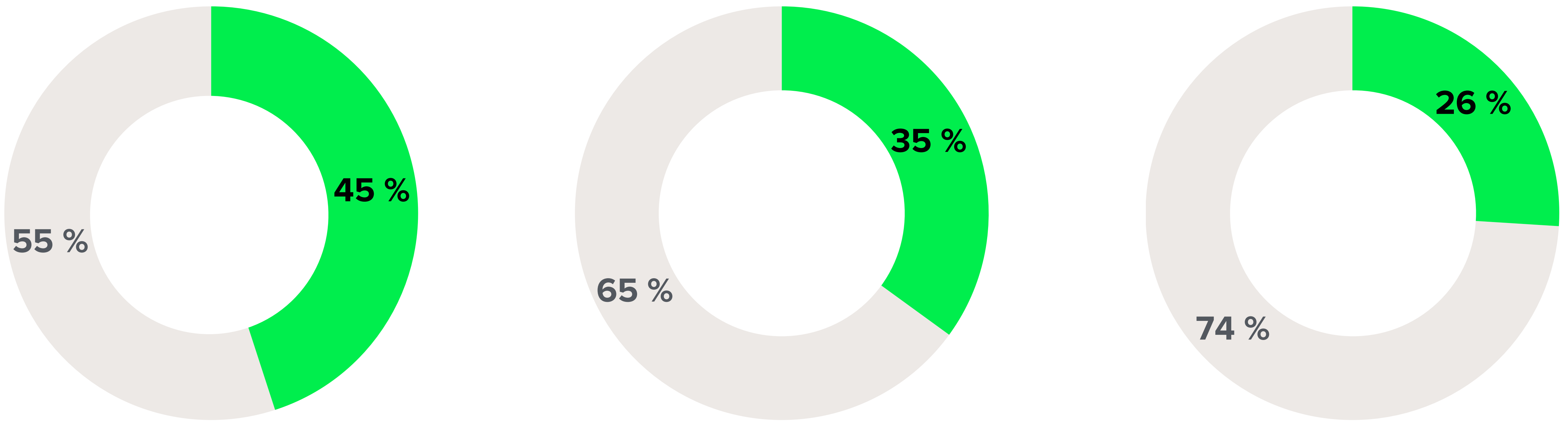
All Adult Germans



45%
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Yes, true   No, false

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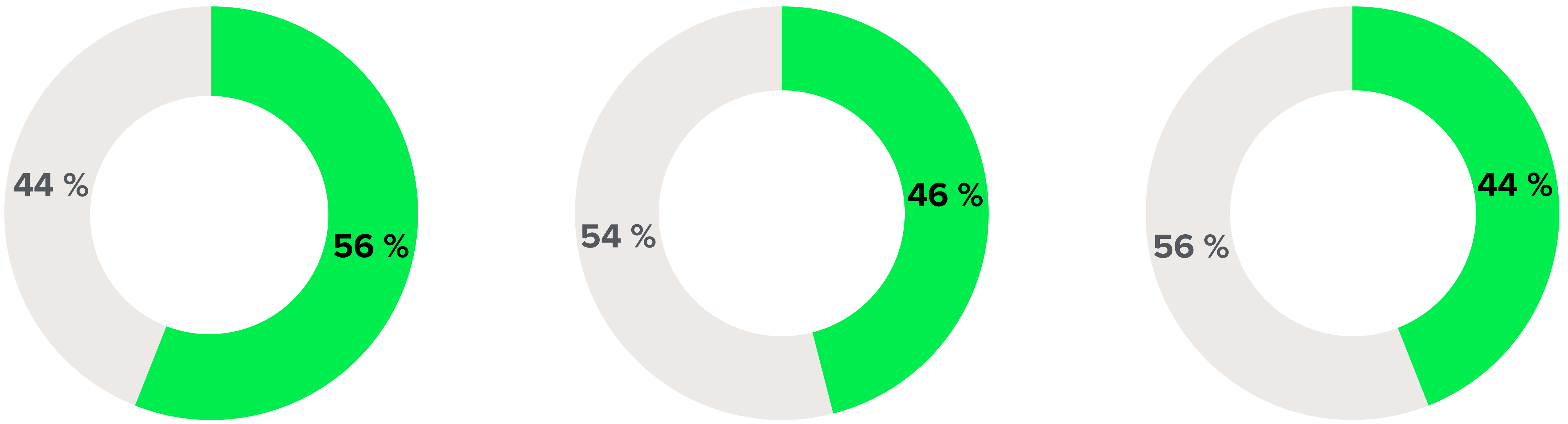
Gen Z



56%
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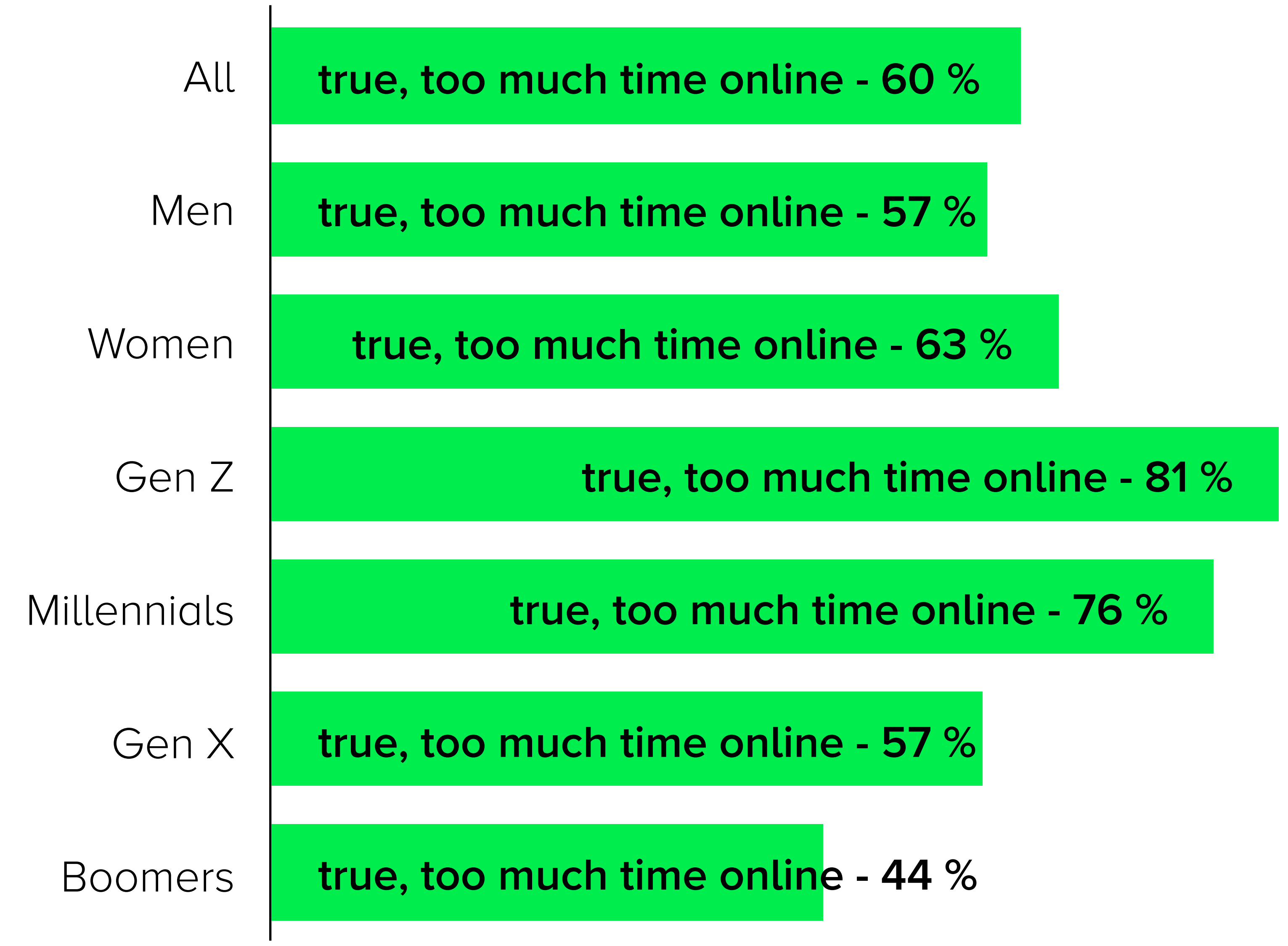
True or False for you?
Overall, I feel I spend too much time online...



Base: General population sample of 1500 adults aged 18-80+ in Germany. Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

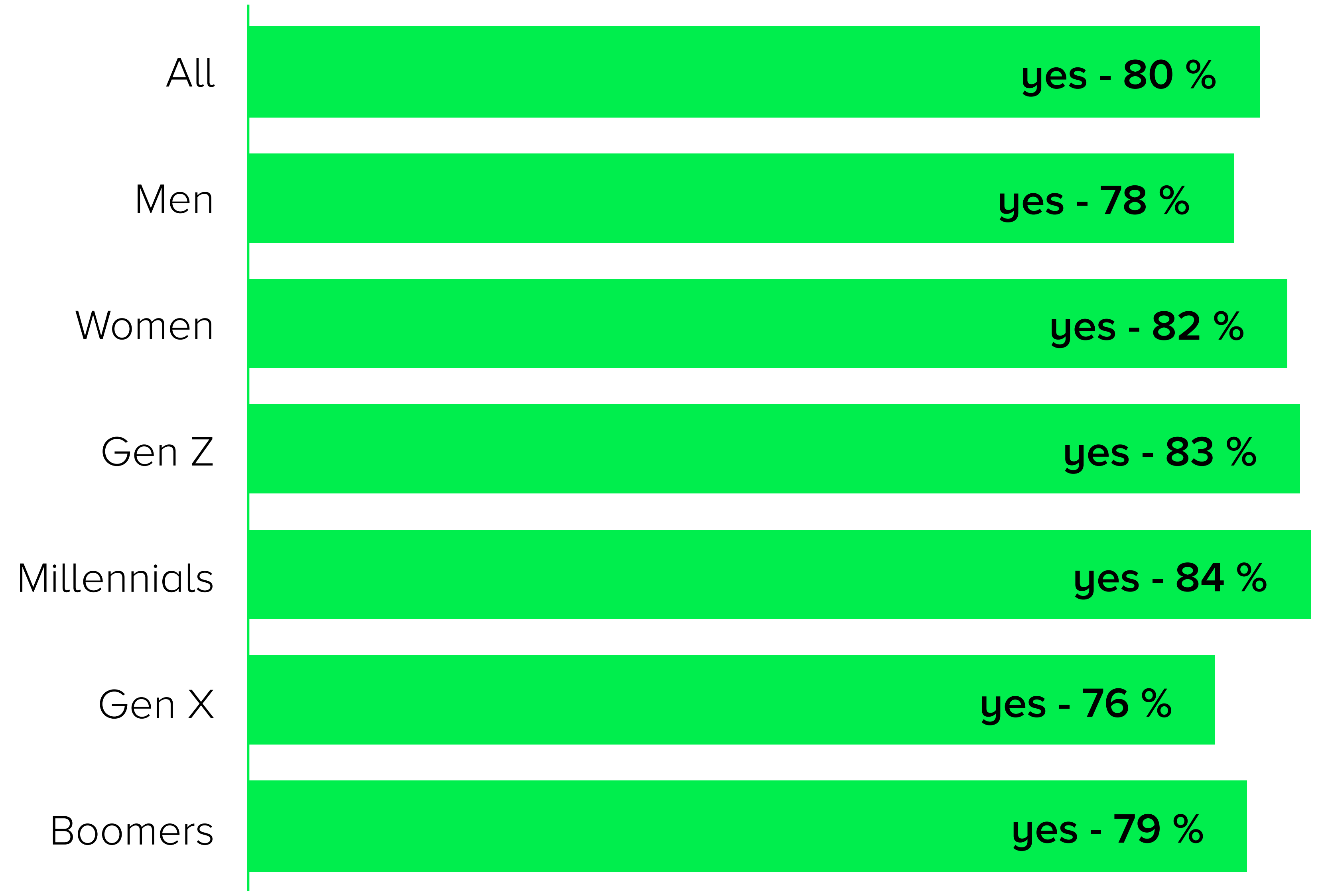
Digital advertising

80% of Germans would remove digital ads from their screens if they could.

What this means for consumer brands

To combat ad avoidance, ad skipping, and ad blindness, consider reframing digital advertising from the consumer perspective. Rather than help brands interrupt and sell, help consumers buy better, by making ads helpful and informative, at the point of need.

If a button existed that would remove all advertising and advertisements from all your digital screens forever, would you press that button?



Base: General population sample of 1500 adults aged 18-80+ in Germany. Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

Digital wellbeing

Overall, 41% of Germans feel they have an unhealthy relationship with the technology in their lives today.

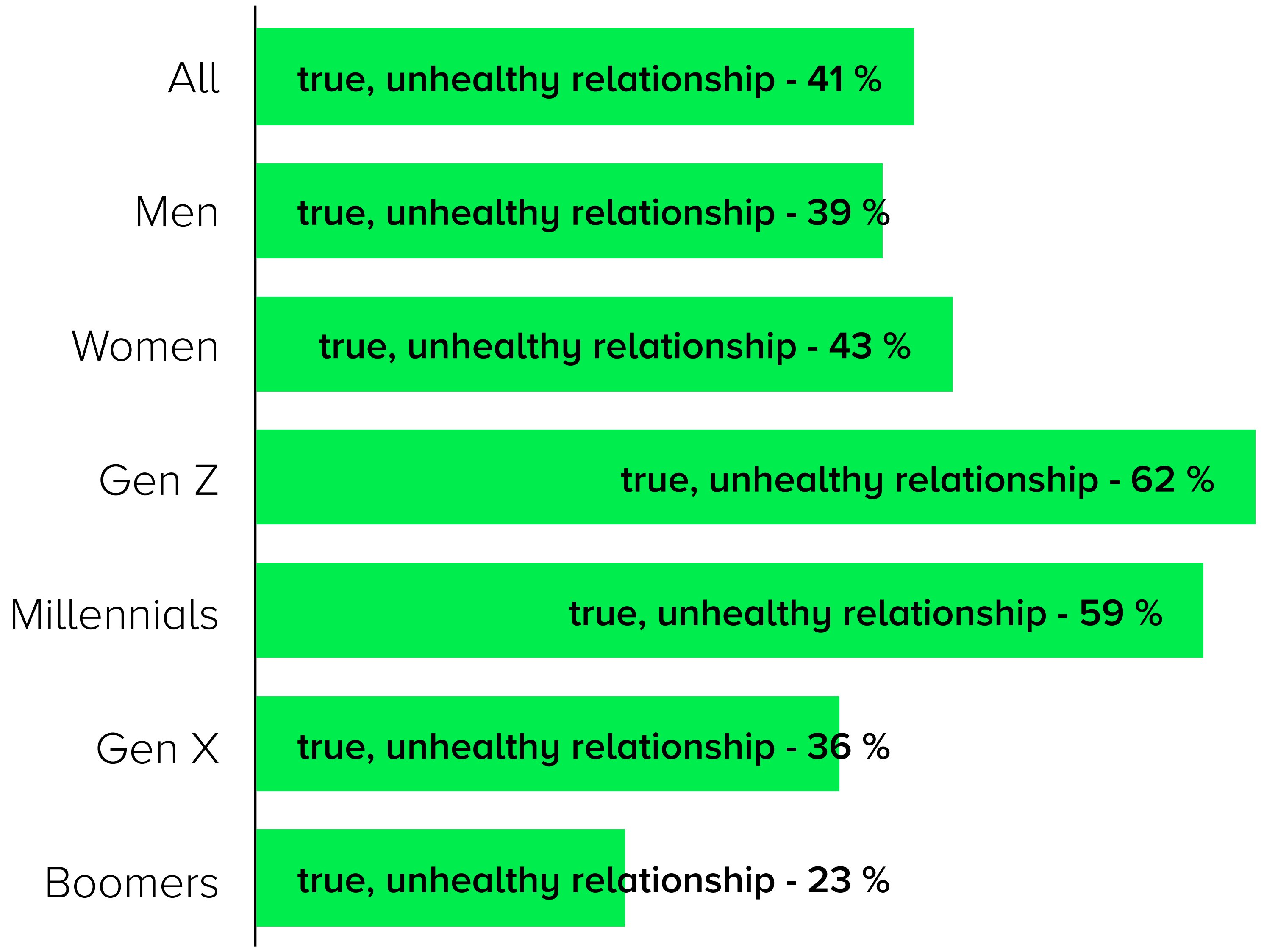
Younger Gen Z and Millennial consumers are significantly more likely to believe their relationship with technology is unhealthy.

69% of Germans think consumer brands don't care about their digital wellbeing.

What this means for consumer brands

Promote digital wellbeing. Consumers want a healthier relationship with the technology in their lives in a post-COVID world. How can your brand help?

If a button existed that would remove all advertising and advertisements from all your digital screens forever, would you press that button?



Base: General population sample of 1500 adults aged 18-80+ in Germany. Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

Digital wellbeing

Overall, 41% of Germans feel they have an unhealthy relationship with the technology in their lives today.

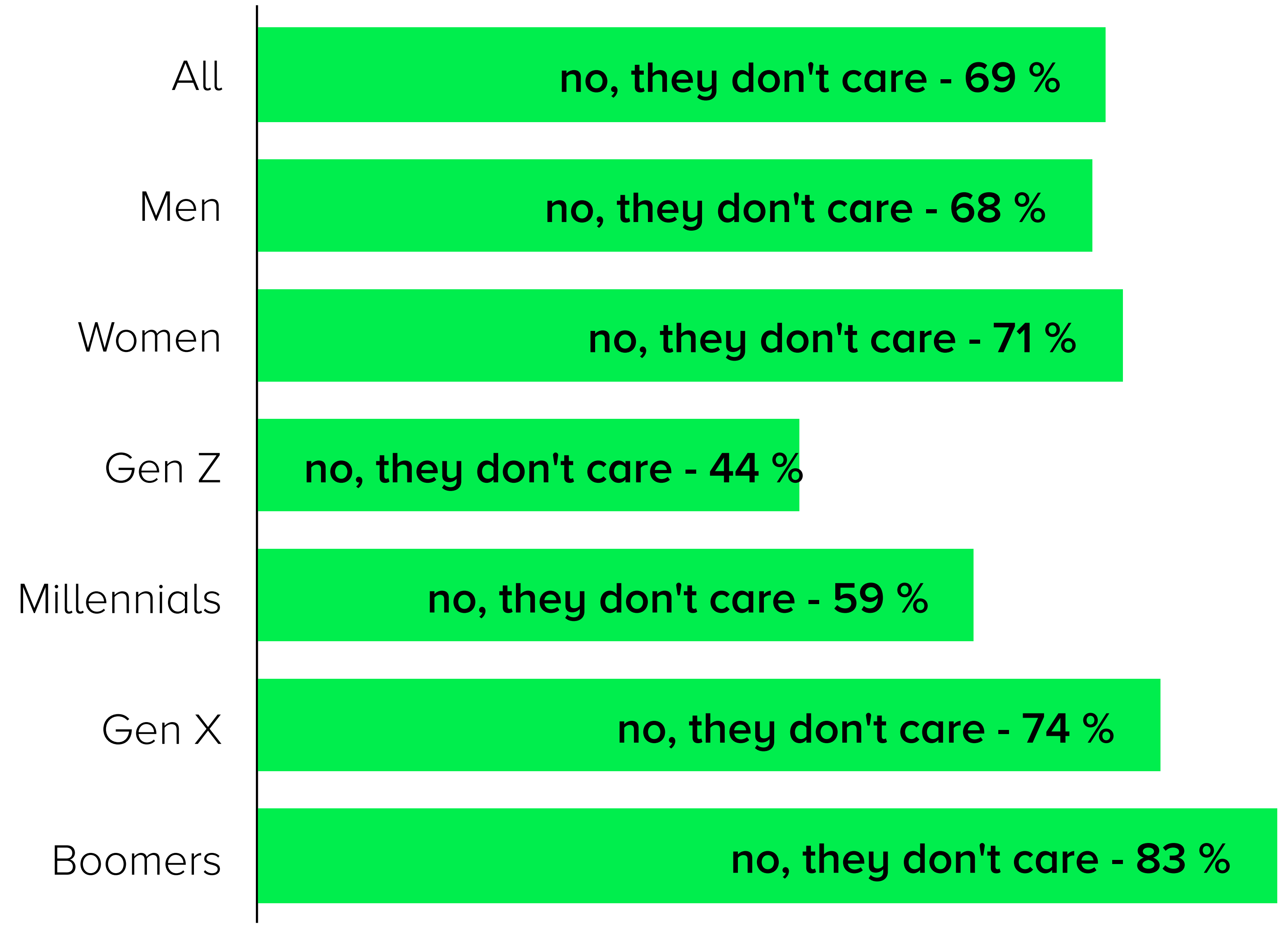
Younger Gen Z and Millennial consumers are significantly more likely to believe their relationship with technology is unhealthy.

69% of Germans think consumer brands don't care about their digital wellbeing.

What this means for consumer brands

Promote digital wellbeing. Consumers want a healthier relationship with the technology in their lives in a post-COVID world. How can your brand help?

Do you think online brands, retailers and service providers care about your 'digital wellbeing'?...



Base: General population sample of 1500 adults aged 18-80+ in Germany. Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

We're a network of digital agencies that believe **digital technology can make a positive difference to people's lives.**

Our positive approach is what makes us different. So if you believe in building on strengths rather than focusing on weaknesses, on potential rather than problems, and in harnessing what's right rather than what's wrong, then you've come to the right place.

SYZYGY GROUP

DIGITAL THAT MAKES A DIFFERENCE

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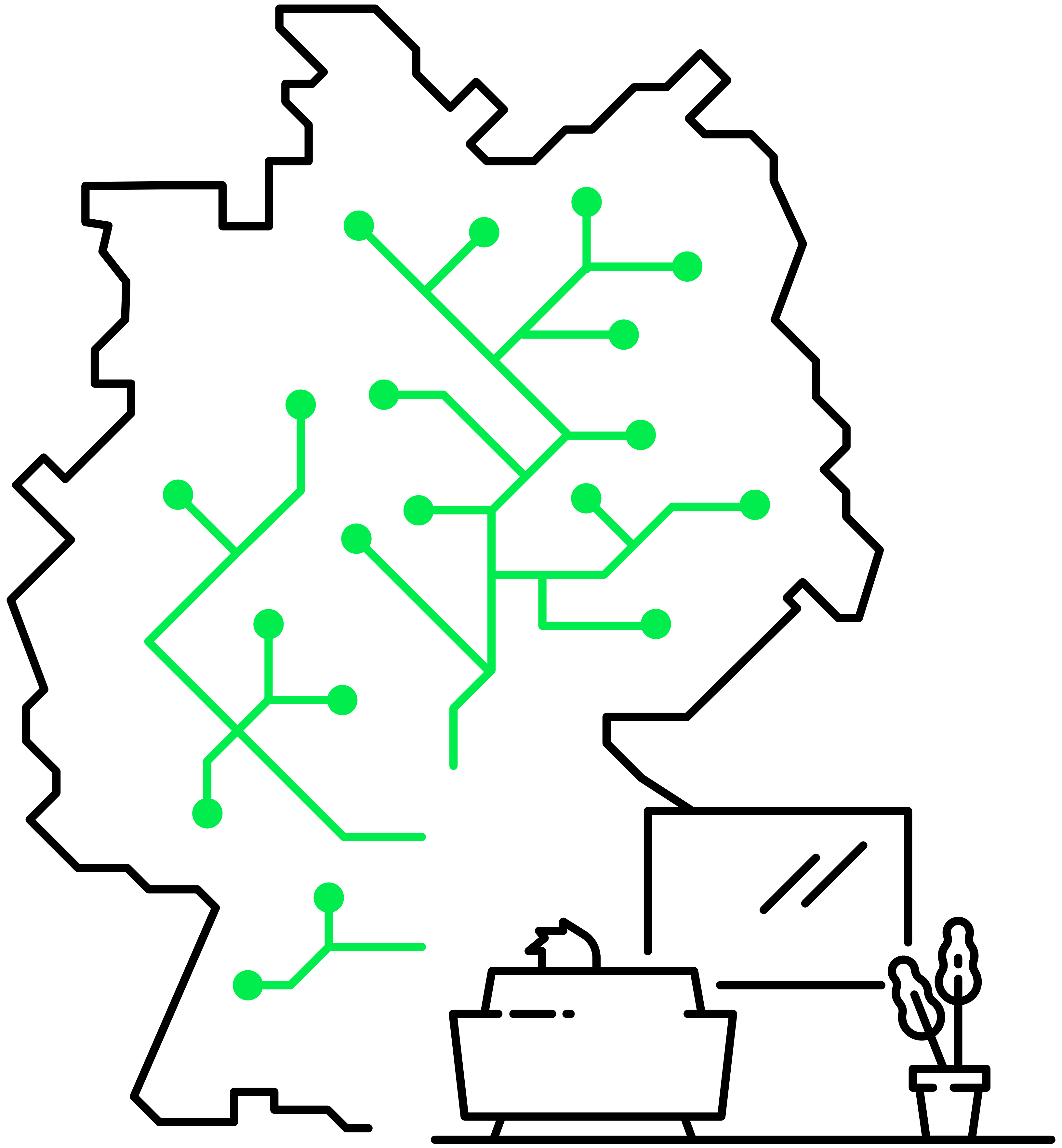
Appendix: **Data tables**



Survey demographics; Gender and generations

	Germany			
	N (base)	%	N (validated)*	%
All	1503	100 %	1463	100 %
Men	767	51 %	743	51 %
Women	733	49 %	717	49 %
Gen Z (born 1997-2012)	209	14 %	189	13 %
Millennials (born 1981-1996)	386	26 %	374	26 %
Gen X (born 1965-1980)	421	28 %	416	28 %
Boomers (born 1946-1964)	420	28 %	418	29 %
Silent (born < 1946)	67	5 %	66	5 %

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

*Validated = respondents who passed attention checks, used for analysis.
Prefer not to answer excluded from count.

1. On a scale of 0-10 how 'digitalised' does your daily life feel to you these days?

	Germany		
	n	x (mean)	CDI
All	**1463**	**7,49**	**75 %**
Men	743	7,53	75 %
Women	717	7,45	75 %
Gen Z (born 1997-2012)	189	8,17	82 %
Millennials (born 1981-1996)	374	8,05	81 %
Gen X (born 1965-1980)	416	7,65	77 %
Boomers (born 1946-1964)	418	6,83	68 %

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

"Digitalisation means 'the integration of digital technologies into your everyday life', including the use of digital devices and online media. A fully digitalised everyday life is a life in which you feel you are permanently online and permanently connected

CDI (consumer digitalisation index) = mean score out of 10 multiplied by 10. CDI of a fully digitised everyday life = 100.

2. On a scale of 0-10 how 'digitalised' did your daily life feel during the first pandemic lockdown of March 2020?

	Germany		
	n	x (mean)	CDI
All	**1463**	**7,15**	**72 %**
Men	743	7,12	71 %
Women	717	7,18	72 %
Gen Z (born 1997-2012)	189	7,79	78 %
Millennials (born 1981-1996)	374	7,39	74 %
Gen X (born 1965-1980)	416	7,34	73 %
Boomers (born 1946-1964)	418	6,73	67 %

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

"Digitalisation means 'the integration of digital technologies into your everyday life', including the use of digital devices and online media. A fully digitalised everyday life is a life in which you feel you are permanently online and permanently connected

CDI (consumer digitalisation index) = mean score out of 10 multiplied by 10. CDI of a fully digitised everyday life = 100.

3. On a scale of 0-10 how 'digitalised' do you expect your daily life to be in the future, one year after the pandemic finally ends?

	Germany		
	n	x (mean)	CDI
All	**1463**	**7,47**	**75 %**
Men	743	7,51	75 %
Women	717	7,43	74 %
Gen Z (born 1997-2012)	189	7,83	78 %
Millennials (born 1981-1996)	374	7,84	78 %
Gen X (born 1965-1980)	416	7,64	76 %
Boomers (born 1946-1964)	418	7,05	71 %

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

"Digitalisation means 'the integration of digital technologies into your everyday life', including the use of digital devices and online media. A fully digitalised everyday life is a life in which you feel you are permanently online and permanently connected

CDI (consumer digitalisation index) = mean score out of 10 multiplied by 10. CDI of a fully digitised everyday life = 100.

4. These days, do you feel ‘permanently online, permanently connected’?

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany			
	Yes (n)	Yes (%)	No (n)	No (%)
All	**966**	**66,0 %**	**497**	**34,0 %**
Men	483	65,0 %	260	35,0 %
Women	481	67,1 %	236	32,9 %
Gen Z (born 1997-2012)	159	84,1 %	30	15,9 %
Millennials (born 1981-1996)	316	84,5 %	58	15,5 %
Gen X (born 1965-1980)	281	67,5 %	135	32,5 %
Boomers (born 1946-1964)	196	46,9 %	222	53,1 %

5. Thinking about your current (or most recent) romantic liaison or partner, how did you first meet this person? Online or in person? (all who answered)

Base: General population sample of 1500 adults in Germany. All who answered. Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany			
	Online (n)	Online (%)	In person (n)	In person (%)
All	**428**	**32,3 %**	**898**	**67,7 %**
Men	213	31,3 %	468	68,7 %
Women	215	33,5 %	427	66,5 %
Gen Z (born 1997-2012)	80	46,8 %	91	53,2 %
Millennials (born 1981-1996)	166	46,8 %	189	53,2 %
Gen X (born 1965-1980)	111	29,4 %	267	70,6 %
Boomers (born 1946-1964)	69	18,5 %	303	81,5 %

5a. Thinking about your current (or most recent) romantic liaison or partner, how did you first meet this person? Online or in person? (Relationships that began since 2020)

Base: General population sample of 1500 adults in Germany. All who answered. Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany			
	Online (n)	Online (%)	In person (n)	In person (%)
All	**80**	**55,9 %**	**63**	**44,1 %**
Men	39	54,9 %	32	45,1 %
Women	41	56,9 %	31	43,1 %
Gen Z (born 1997-2012)	28	51,9 %	26	48,1 %
Millennials (born 1981-1996)	30	53,6 %	26	46,4 %
Gen X (born 1965-1980)	12	54,5 %	10	45,5 %
Boomers (born 1946-1964)	10	90,9 %	1	9,1 %

6. Do you currently use a digital assistant (e.g. Alexa, Siri, Google Assistant)?

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany			
	Yes (n)	Yes (%)	No (n)	No (%)
All	**739**	**50,5 %**	**724**	**49,5 %**
Men	385	51,8 %	358	48,2 %
Women	353	49,2 %	364	50,8 %
Gen Z (born 1997-2012)	125	66,1 %	64	33,9 %
Millennials (born 1981-1996)	225	60,2 %	149	39,8 %
Gen X (born 1965-1980)	245	58,9 %	171	41,1 %
Boomers (born 1946-1964)	132	31,6 %	286	68,4 %

7. Overall, do you think a more digitalised life is a better life?

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel:
Fieldwork conducted Q1, 2022.

	Germany			
	Yes (*n*)	Yes (%)	No (*n*)	No (%)
All	**865**	**59,1 %**	**598**	**40,9 %**
Men	461	62,0 %	282	38,0 %
Women	402	56,1 %	315	43,9 %
Gen Z (born 1997-2012)	137	72,5 %	52	27,5 %
Millennials (born 1981-1996)	258	69,0 %	116	31,0 %
Gen X (born 1965-1980)	238	57,2 %	178	42,8 %
Boomers (born 1946-1964)	215	51,4 %	203	48,6 %

8. Thinking about your most recent online interaction with a brand, retailer or service provider, how close to ideal was this interaction?

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany								
	Not at all close to ideal (1)		Not very close to ideal (2)		Quite close to ideal (3)		Very close to ideal (4)		Average
	(n)	*(%)*	*(n)*	*(%)*	*(n)*	*(%)*	*(n)*	*(%)*	x
All	**67**	**4,6 %**	**467**	**31,9 %**	**833**	**56,9 %**	**96**	**6,6 %**	**2,65**
Men	25	3,4 %	244	32,8 %	429	57,7 %	45	6,1 %	2,66
Women	42	5,9 %	223	31,1 %	401	55,9 %	51	7,1 %	2,64
Gen Z (born 1997-2012)	10	5,3 %	81	42,9 %	93	49,2 %	5	2,6 %	2,49
Millennials (born	10	2,7 %	123	32,9 %	216	57,8 %	25	6,7 %	2,68
Gen X (born 1965-1980)	16	3,8 %	113	27,2 %	260	62,5 %	27	6,5 %	2,72
Boomers (born 1946-1964)	20	4,8 %	122	29,2 %	241	57,7 %	35	8,4 %	2,70

9. For you personally, and overall, what are the top three benefits of more digital technology in your everyday life?

	Germany															
	Men		Women		Gen Z		Millennial		Gen X		Boomer		Total		Rank
	n	%	n	%	n	%	n	%	n	%	n	%			
Saves time	483	65,0 %	406	56,6 %	121	64,0 %	237	63,4 %	255	61,3 %	253	60,5 %	891	**60,9 %**	1
Saves effort (ease)	348	46,8 %	336	46,9 %	96	50,8 %	182	48,7 %	197	47,4 %	186	44,5 %	685	**46,8 %**	2
More choice	256	34,5 %	257	35,8 %	66	34,9 %	147	39,3 %	133	32,0 %	151	36,1 %	515	**35,2 %**	3
Allows me to do things anytime/anywhere	167	22,5 %	216	30,1 %	41	21,7 %	70	18,7 %	126	30,3 %	125	29,9 %	383	**26,2 %**	4
Saves money	213	28,7 %	141	19,7 %	51	27,0 %	107	28,6 %	109	26,2 %	81	19,4 %	354	**24,2 %**	5
Helps me do things better	168	22,6 %	174	24,3 %	41	21,7 %	76	20,3 %	92	22,1 %	110	26,3 %	343	**23,4 %**	6
Helps me get more done	117	15,7 %	153	21,3 %	34	18,0 %	68	18,2 %	78	18,8 %	77	18,4 %	270	**18,5 %**	7
Better communication	72	9,7 %	92	12,8 %	21	11,1 %	28	7,5 %	41	9,9 %	59	14,1 %	164	**11,2 %**	8
Gives me more control	88	11,8 %	69	9,6 %	32	16,9 %	55	14,7 %	42	10,1 %	23	5,5 %	158	**10,8 %**	9
More enjoyable experience	84	11,3 %	70	9,8 %	15	7,9 %	36	9,6 %	50	12,0 %	47	11,2 %	154	**10,5 %**	10
Helps me make better decisions	66	8,9 %	58	8,1 %	10	5,3 %	32	8,6 %	31	7,5 %	45	10,8 %	124	**8,5 %**	11
Makes things less stressful	51	6,9 %	71	9,9 %	13	6,9 %	31	8,3 %	38	9,1 %	35	8,4 %	123	**8,4 %**	12
More reliable	31	4,2 %	25	3,5 %	3	1,6 %	13	3,5 %	16	3,8 %	17	4,1 %	56	**3,8 %**	13
More sustainable	23	3,1 %	28	3,9 %	9	4,8 %	14	3,7 %	16	3,8 %	8	1,9 %	51	**3,5 %**	14
Superior experience	19	2,6 %	18	2,5 %	6	3,2 %	12	3,2 %	7	1,7 %	10	2,4 %	37	**2,5 %**	15
More private	22	3,0 %	14	2,0 %	8	4,2 %	7	1,9 %	6	1,4 %	10	2,4 %	36	**2,5 %**	16
More personalised experience	9	1,2 %	8	1,1 %	0	0,0 %	6	1,6 %	4	1,0 %	6	1,4 %	18	**1,2 %**	17

Base: General population sample of 1500 adults in Germany. Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.
Percentages are proportion of respondents citing the benefit as a top three benefit

10. For you personally, and overall, what are the top three hazards (harms, risks) of more digital technology in your everyday life?

	Germany														
	Men		Women		Gen Z		Millennial		Gen X		Boomer		Total		Rank
	n	%	*n*	%	*n*	%	*n*	%	*n*	%	*n*	%			
Harm to human relationships	408	54,9 %	434	60,5 %	107	56,6 %	218	58,3 %	254	61,1 %	227	54,3 %	844	**57,7 %**	1
Harm to mental health	341	45,9 %	354	49,4 %	131	69,3 %	210	56,2 %	161	38,7 %	173	41,4 %	695	**47,5 %**	2
Threat to privacy	326	43,9 %	307	42,8 %	75	39,7 %	139	37,2 %	188	45,2 %	197	47,1 %	634	**43,3 %**	3
Harm to physical health	192	25,8 %	193	26,9 %	71	37,6 %	121	32,4 %	93	22,4 %	91	21,8 %	386	**26,4 %**	4
Harms traditional shops/retail	133	17,9 %	195	27,2 %	23	12,2 %	78	20,9 %	105	25,2 %	107	25,6 %	329	**22,5 %**	5
Creates social division	176	23,7 %	134	18,7 %	33	17,5 %	73	19,5 %	100	24,0 %	90	21,5 %	311	**21,3 %**	6
Threat to jobs	145	19,5 %	132	18,4 %	31	16,4 %	79	21,1 %	94	22,6 %	66	15,8 %	277	**18,9 %**	7
Amplifies disinformation	157	21,1 %	117	16,3 %	24	12,7 %	54	14,4 %	76	18,3 %	105	25,1 %	275	**18,8 %**	8
Harms traditions/customs	116	15,6 %	87	12,1 %	7	3,7 %	37	9,9 %	65	15,6 %	77	18,4 %	203	**13,9 %**	9
Harms traditions/customs	70	9,4 %	71	9,9 %	29	15,3 %	40	10,7 %	37	8,9 %	29	6,9 %	141	**9,6 %**	10
Threat to autonomy/freedom	52	7,0 %	33	4,6 %	14	7,4 %	34	9,1 %	23	5,5 %	11	2,6 %	85	**5,8 %**	11
Undermines democracy	40	5,4 %	22	3,1 %	8	4,2 %	15	4,0 %	13	3,1 %	21	5,0 %	63	**4,3 %**	12

Base: General population sample of 1500 adults in Germany. Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.
Percentages are proportion of respondents citing the benefit as a top three benefit

11. True or False? Sometimes I feel 'addicted' to some of the digital technology in my life...

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany			
	False (n)	False (%)	True (n)	True (%)
All	767	52,5 %	695	**47,5 %**
Men	418	56,3 %	324	**43,7 %**
Women	347	48,4 %	370	**51,6 %**
Gen Z (born 1997-2012)	47	24,9 %	142	**75,1 %**
Millennials (born 1981-1996)	98	26,2 %	276	**73,8 %**
Gen X (born 1965-1980)	236	56,7 %	180	**43,3 %**
Boomers (born 1946-1964)	326	78,2 %	91	**21,8 %**

12. True or False? Truthfully, I'd rather go without breakfast for a month, than be completely offline for a month...

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany			
	False (n)	False (%)	True (n)	True (%)
All	799	54,7 %	663	**45,3 %**
Men	425	57,3 %	317	**42,7 %**
Women	373	52,0 %	344	**48,0 %**
Gen Z (born 1997-2012)	84	44,4 %	105	**55,6 %**
Millennials (born 1981-1996)	180	48,1 %	194	**51,9 %**
Gen X (born 1965-1980)	218	52,4 %	198	**47,6 %**
Boomers (born 1946-1964)	268	64,3 %	149	**35,7 %**

13. True or False? Truthfully, I'd rather go without sex for a month, than be completely offline for a month...

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany			
	False (n)	False (%)	True (n)	True (%)
All	955	65,5 %	504	**34,5 %**
Men	548	74,1 %	192	**25,9 %**
Women	405	56,6 %	311	**43,4 %**
Gen Z (born 1997-2012)	103	54,5 %	86	**45,5 %**
Millennials (born 1981-1996)	241	64,4 %	133	**35,6 %**
Gen X (born 1965-1980)	259	62,6 %	155	**37,4 %**
Boomers (born 1946-1964)	300	72,1 %	116	**27,9 %**

14. True or False? Truthfully, I'd rather have a broken finger for a month, than have a broken phone for a month...

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany			
	False (n)	False (%)	True (n)	True (%)
All	1083	74,2 %	377	**25,8 %**
Men	571	77,1 %	170	**22,9 %**
Women	511	71,4 %	205	**28,6 %**
Gen Z (born 1997-2012)	105	55,6 %	84	**44,4 %**
Millennials (born 1981-1996)	248	66,5 %	125	**33,5 %**
Gen X (born 1965-1980)	316	76,1 %	99	**23,9 %**
Boomers (born 1946-1964)	355	85,1 %	62	**14,9 %**

15. True or False? Overall, I feel I spend too much time online...

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany			
	False (n)	False (%)	True (n)	True (%)
All	581	39,8 %	878	**60,2 %**
Men	316	42,6 %	425	**57,4 %**
Women	263	36,8 %	452	**63,2 %**
Gen Z (born 1997-2012)	36	19,1 %	152	**80,9 %**
Millennials (born 1981-1996)	91	24,3 %	283	**75,7 %**
Gen X (born 1965-1980)	178	42,9 %	237	**57,1 %**
Boomers (born 1946-1964)	232	55,6 %	185	**44,4 %**

16. True or False? I would like to spend less time online...

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany			
	False (n)	False (%)	True (n)	True (%)
All	652	44,6 %	809	**55,4 %**
Men	340	45,9 %	401	**54,1 %**
Women	309	43,1 %	408	**56,9 %**
Gen Z (born 1997-2012)	46	24,3 %	143	**75,7 %**
Millennials (born 1981-1996)	128	34,2 %	246	**65,8 %**
Gen X (born 1965-1980)	204	49,2 %	211	**50,8 %**
Boomers (born 1946-1964)	238	57,1 %	179	**42,9 %**

17. If a button existed that would remove all advertising and advertisements from all your digital screens forever, would you press that button?

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany			
	Yes	Yes (%)	No (n)	No (%)
All	1169	**79,9 %**	294	20,1 %
Men	578	**77,8 %**	165	22,2 %
Women	589	**82,1 %**	128	17,9 %
Gen Z (born 1997-2012)	157	**83,1 %**	32	16,9 %
Millennials (born 1981-1996)	314	**84,0 %**	60	16,0 %
Gen X (born 1965-1980)	318	**76,4 %**	98	23,6 %
Boomers (born 1946-1964)	330	**78,9 %**	88	21,1 %

18. True or False? Sometimes I feel I have an unhealthy relationship with the technology in my life...

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany			
	False (n)	False (%)	True (n)	True (%)
All	862	59,2 %	594	**40,8 %**
Men	453	61,2 %	287	**38,8 %**
Women	406	56,9 %	307	**43,1 %**
Gen Z (born 1997-2012)	72	38,1 %	117	**61,9 %**
Millennials (born 1981-1996)	154	41,3 %	219	**58,7 %**
Gen X (born 1965-1980)	265	63,9 %	150	**36,1 %**
Boomers (born 1946-1964)	320	77,1 %	95	**22,9 %**

19. Overall, do you think online brands, retailers and service providers care about your 'digital wellbeing'?

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany			
	Yes (*n*)	Yes (%)	No (*n*)	No (%)
All	**447**	**30,6 %**	**1016**	**69,4 %**
Men	236	31,8 %	507	68,2 %
Women	210	29,3 %	507	70,7 %
Gen Z (born 1997-2012)	105	55,6 %	84	44,4 %
Millennials (born 1981-1996)	155	41,4 %	219	58,6 %
Gen X (born 1965-1980)	109	26,2 %	307	73,8 %
Boomers (born 1946-1964)	70	16,7 %	348	83,3 %

20. On a scale of 0-10, how satisfied are you with your life these days? (0 = extremely unsatisfied, 10 = extremely satisfied)

Base: General population sample of 1500 adults in Germany.
Momentive Online Consumer Panel: Fieldwork conducted Q1, 2022.

	Germany		
	n	x (mean)	SWL (/100)
All	**1463**	**6,60**	**66**
Men	743	6,71	67
Women	717	6,47	65
Gen Z (born 1997-2012)	189	6,57	66
Millennials (born 1981-1996)	374	6,53	65
Gen X (born 1965-1980)	416	6,55	66
Boomers (born 1946-1964)	418	6,69	67