The Sandpiper Study:

Consumer Expectations 2020

Six-Market Report

Australia, China, Hong Kong, India, Malaysia and Singapore

CONTENTS

Inform.
Create.
Shape.

FOREWORD

What do consumers expect from governments, companies and individuals? This simple question has many answers. It depends on a consumer's age, gender, nationality and local culture. We also know that what they expect today will change dramatically in five, ten, twenty years.

In this study, we looked at consumer expectations about key issues that impact companies, governments and NGOs in Australia, China, Hong Kong SAR, India, Malaysia and Singapore in 2020. We have looked at their views on topics ranging from sustainability to climate change, to the industries and companies they most admire and what attributes they look for to gain this trust. We also studied the type of content they want and trust from organisations, and how they view the growing issue of data privacy. The answers are illuminating – and critically important to organisations who want to communicate effectively with consumers.

To conduct this study we conducted an online survey with 5,680 consumers in nearly equal numbers from Australia, China, Hong Kong SAR, India, Malaysia and Singapore in late 2019. Depending on population size and complexity, a sample size of between 500 and 1,000 respondents was surveyed to provide statistically significant findings which can be extrapolated to the general population. In addition, age and gender quotas were set based on their respective proportion of the population.

I hope you find the results useful and inspiring. We care about this study because it provides insights, and guides us in our mission to make sense of the challenges our clients face in a time of change.

EMMA SMITH
CEO

Sandpiper

EXECUTIVE SUMMARY

Our annual Consumer Expectations Index looks at what consumers expect of leaders, companies, governments, and NGOs, on key issues in Australia, China, Hong Kong SAR, India, Malaysia, and Singapore.

In 2020, nearly 90% of consumers believe governments, followed closely by publicly-listed companies (86%) should be responsible for ensuring and promoting future economic, environmental, and social sustainability. Two-fifths of consumers believe CEOs have this kind of power as well.

Consumers also expect countries and companies to prioritise the environment over economic growth. Millennials in China have the most awareness of the United Nation's Sustainable Development Goals, at just under 90%. Gen X in Australia has the least awareness, at 24%.

Consumers also expect countries and companies to prioritise the environment over economic growth.

Boycott or Buycott: Are companies acting with the purpose we expect?

We looked at key factors which impact consumers' decision whether to buy products or services from a business or brand.

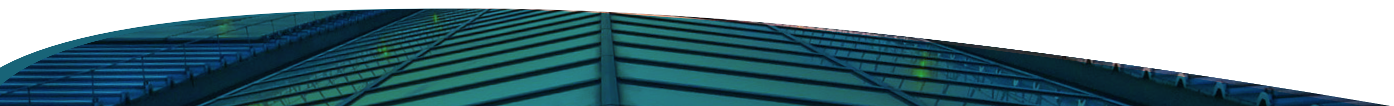
Sustainable and ethical sourcing, and packaging, rank high for almost every industry sector, as do environmental mismanagement and fair trade. Cybersecurity is clearly preying on consumers' minds. Perhaps, disappointingly, corruption is not as big a factor as might be expected.

We also asked respondents to rank the top three most responsible and trustworthy industries and companies in their countries. You may be surprised by their answers.

How responsible is responsible?

Are companies seen as fully transparent and responsible when it comes to meeting regulatory requirements? The result was easy to see. Most consumers believe that companies are 'box tickers' when it comes to acting responsibly – doing what is simply required by local regulators.

This led us to ask consumers who they trust for news and information. Family and friends rank high, as would be expected, but for communicators it is important to know that information from companies is vital, although sometimes taken with a "pinch of salt."



Getting the facts

In a time when trust is more important than ever, we are pleased to learn that consumers still rank reputable or traditional news sources as the most popular sources of real news; despite what we know of social media's importance – although there is marked difference between markets. 77% of India's Gen X'ers believe traditional news sources are trusted or highly trusted. In Australia, 21% of the same generation believe traditional news sources are trusted or highly trusted.

When it comes to sharing news and information with their peers online or by word-of-mouth, most consumers do so because they believe it is newsworthy or it relates to causes they care about. Surprisingly, humour and making people laugh do not rank highly – or this may be what people wanted our researchers to think.

Nearly 40% of consumers share news and content with their online connections multiple times per day, with more than half sharing content at least once per day. Just under 20% of consumers share content with their online connections multiple times per week, with 6% sharing content at least once per week.

How important is information from companies?

We asked consumers who they trust most for news and information. Family sources rank the highest, followed by experts such as scientists and researchers. For business communicators, it is important to note that company information ranks well overall, although sometimes taken with a "pinch of salt."

The future

We launch this report as news of the impact of COVID-19, a novel Coronavirus, increases daily. If the spread of the virus continues on its current trajectory, we will conduct a pulse-research during the year, to update our findings. If we do this, be assured we will let you know, so you can compare today's results with those in the future.

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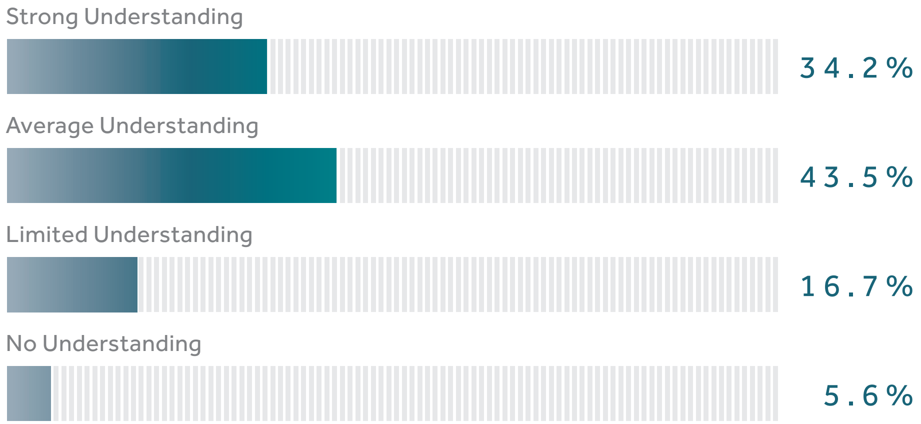
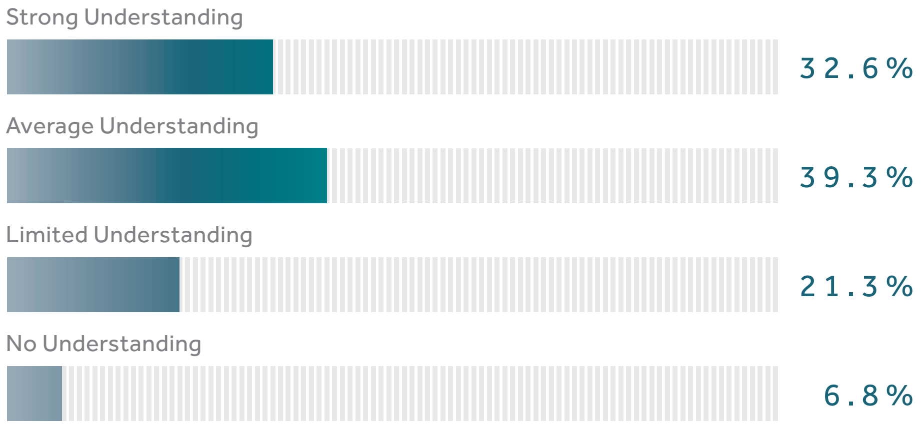
UNDERSTANDING CONSUMERS' KNOWLEDGE OF KEY ISSUES

In order to gauge consumers' opinions and expectations, we first needed know how well they understand some of the key issues and actions being taken by both the public and private sectors to improve countries' economies, environments and overall sustainability. We were gratified to find that nearly **80%** of respondents across the six markets have an average to strong understanding of Corporate Social Responsibility (CSR), while close to **72%** have an average to strong understanding of Environmental, Social and Corporate Governance (ESG), which has become one of the hottest topics in today's financial markets.

UNDERSTANDING OF CSR



UNDERSTANDING OF ESG

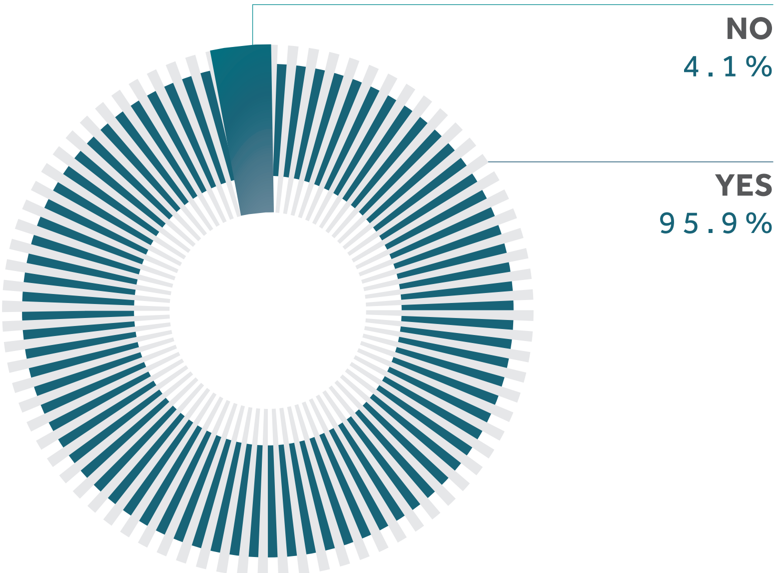


CLIMATE CHANGE

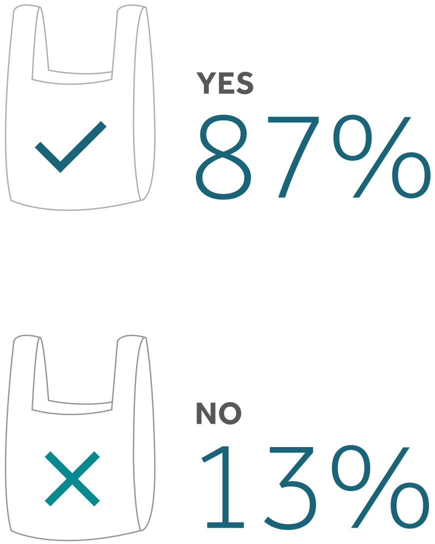
Given the strong understanding of ESG and CSR, it came as no surprise to use that nearly every person we surveyed believes in Climate Change – in fact, **only 4.1% do not believe**.

Related to the climate and environment, we asked whether single-use plastics should be banned, and the over-whelming response is yes – at **87%**.

DO YOU BELIEVE IN CLIMATE CHANGE?



SHOULD SINGLE USE PLASTICS BE BANNED?



WHO IS RESPONSIBLE FOR LEADING THE WAY?

Having established a benchmark for some of the basic concepts we wanted to understand to dig deeper into more complex issues. Set in 2015 by the United Nations General Assembly and intended to be achieved by the year 2030, the 17 Sustainable Development Goals (SDGs) are the blueprint to achieve a better and more sustainable future for all. They address the global challenges we face, including those related to poverty, inequality, climate change, environmental degradation, peace and justice. The 17 Goals are all interconnected, and in order to leave no one behind.

We asked consumers in the six markets about their awareness and their emotions about the SDGs. Just under **60%** of respondents were aware of the SDGs, and those who were aware feel a mixture of emotions, ranging from **satisfaction to concern to frustration and anger**.

WHAT EMOTIONS DO CONSUMERS FEEL IN RELATION TO THE MAIN SDGs?

(Data based on total responses greater than 25%)

FRUSTRATION/ ANGER

Hunger & Malnutrition, Income Inequality, Ocean Pollution, Protection of land, forests and biodiversity

CONCERN

Poverty, Access to Healthcare, Access to education, Access to clean water and sanitization, Unemployment, Provision of affordable and clean energy, Unsustainable infrastructure and innovation, Income inequality, Building safe, resilient and sustainable cities, Climate change, Ocean Pollution, Protection of land, forests and biodiversity

SATISFIED

Access to Healthcare, Access to Education, Gender Inequality, Access to clean water and sanitation, Provision of affordable and clean energy, Promoting peaceful and inclusive societies

Given the wide range of emotions about the SDGs, we were interested in understanding who consumers believe should be responsible for ensuring and promoting future economic, environmental and social sustainability? The chart below shows which groups were ranked Number One by consumers. Unsurprisingly, governments came out top at **89.9%**, closely followed by publicly listed companies, **85.4%** and then the general public (**80.6%**) and private companies (**79.5%**). Interestingly, the media is felt to have a strong responsibility too, at **78.6%**.

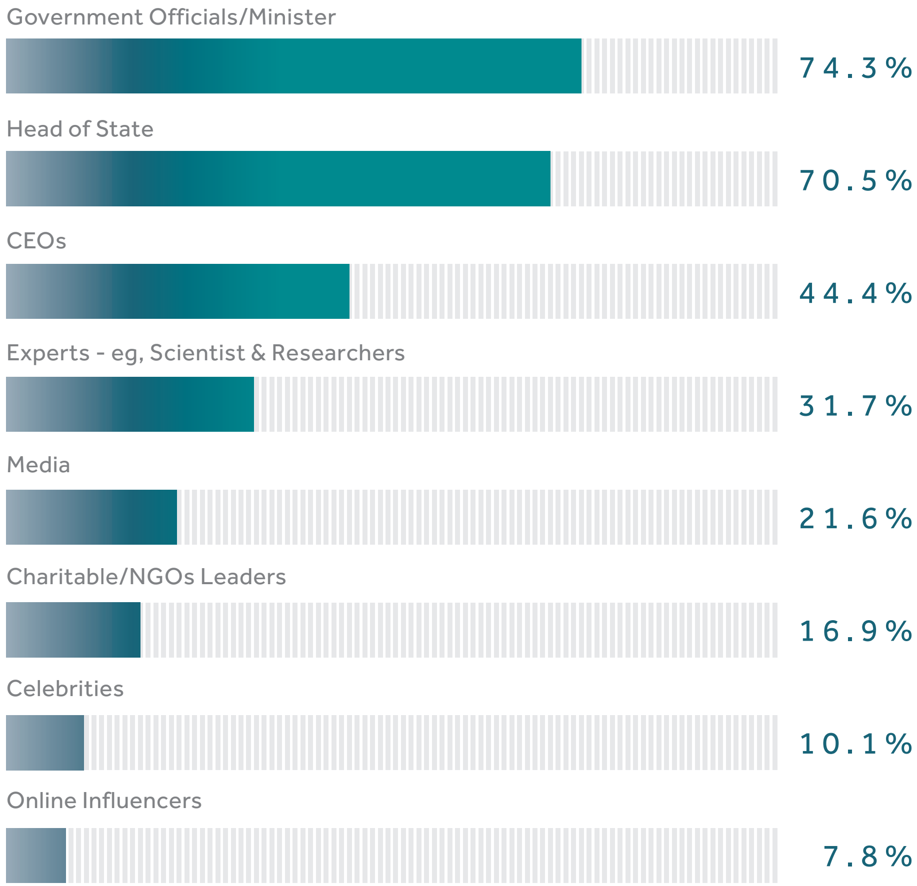
HOW RESPONSIBLE DO YOU BELIEVE EACH OF THE FOLLOWING GROUPS SHOULD BE FOR ENSURING AND PROMOTING FUTURE ECONOMIC, ENVIRONMENTAL AND SOCIAL SUSTAINABILITY?

Government	89.9%
Publicly Listed Companies	85.4%
General Public	80.6%
Private Companies (not listed)	79.5%
Media	78.6%
NGOs	74.8%

Given the statistically small difference between our top ranked organisations, we also asked consumers **which individuals they believe hold the most power** for ensuring and promoting future economic, environmental and social sustainability. This is where expectations differed considerably. As we would expect, **Government officials, ministers and heads of state** far outranked other people when it came to power, between **70.5%** and **74.3%**. However, **two fifths** of consumers believe that **CEOs** have this kind of power as well. In our list of influencers, **celebrities and social online influencers** are perceived as having little power in comparison, at **10.1%** and **7.8%** respectively. This is clearly an important result for communicators.

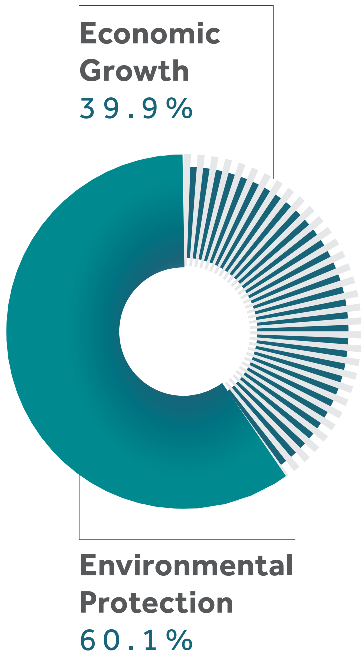
WHICH INDIVIDUALS DO YOU BELIEVE HOLD THE MOST POWER TO ENSURE AND PROMOTE FUTURE ECONOMIC, ENVIRONMENTAL AND SOCIAL SUSTAINABILITY?

(Data comprises the top three ranking out of ten, for each individual)

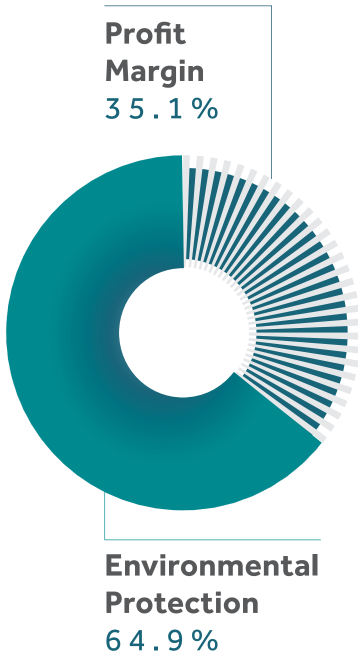


While we looked at priorities and power, we wanted to know what consumer expectations are when it comes to what countries and companies should prioritise when considering economic growth/profit margin vs environmental protection. The answer is that consumers expect both groups to look to the environment first.

WHAT SHOULD COUNTRIES PRIORITISE – ECONOMIC GROWTH OR ENVIRONMENTAL PROTECTION?



WHAT SHOULD BUSINESSES PRIORITISE – PROFIT MARGIN OR ENVIRONMENTAL PROTECTION?



BOYCOTT OR BUYCOTT: ARE COMPANIES ACTING WITH THE PURPOSE WE EXPECT?

We looked at 14 reputational factors which impact consumers' decision whether to buy products or services from a business or brand across 8 industry sectors. As you would expect, reactions differed. However, there were some stand-out factors for some sectors – for example, sustainable and ethical sourcing / packaging rank high for almost every industry sector, as do environmental pollution / mismanagement and fair trade. In addition, cybersecurity is clearly preying on consumers' minds. Perhaps, disappointingly, corruption does not appear to as big factor as might be expected.

HOW LIKELY ARE THESE REPUTATIONAL FACTORS TO IMPACT YOUR DECISION WHETHER TO BUY PRODUCTS OR SERVICES FROM A BUSINESS OR BRAND?

Reputational Factor	Consumer Products %	Energy %	Financial Services %	Food & Agriculture %	Healthcare %	Professional Services %	Technology %	Travel %
Financial health of company	L: 55.8 U: 10.8 N: 31.6 D: 1.8	L: 59.4 U: 8.9 N: 29.9 D: 1.8	L: 68.8 U: 6.6 N: 22.9 D: 1.7	L: 59.9 U: 7.6 N: 30.7 D: 1.7	L: 63.7 U: 7.5 N: 27.0 D: 1.9	L: 67.5 U: 6.3 N: 24.2 D: 2.0	L: 66.4 U: 6.7 N: 24.9 D: 2.0	L: 67.9 U: 6.6 N: 23.5 D: 2.1
Leadership / CEO	L: 56.8 U: 10.2 N: 30.9 D: 2.1	L: 68.8 U: 9.2 N: 30.1 D: 2.0	L: 65.1 U: 7.5 N: 25.4 D: 2.0	L: 59.0 U: 8.5 N: 30.0 D: 2.6	L: 62.2 U: 7.6 N: 28.2 D: 2.0	L: 64.1 U: 6.9 N: 26.9 D: 2.2	L: 64.4 U: 7.3 N: 26.1 D: 2.2	L: 61.7 U: 7.6 N: 28.2 D: 2.6
Fair trade	L: 68.8 U: 6.3 N: 3.6 D: 1.3	L: 67.3 U: 6.6 N: 24.7 D: 1.4	L: 67.2 U: 6.9 N: 24.4 D: 1.5	L: 69.5 U: 5.9 N: 23.0 D: 1.6	L: 65.5 U: 6.8 N: 25.8 D: 1.9	L: 66.9 U: 6.6 N: 24.4 D: 2.1	L: 67.3 U: 6.1 N: 24.6 D: 1.9	L: 66.2 U: 7.2 N: 24.5 D: 2.1
Corruption	L: 56.6 U: 22.3 N: 18.5 D: 2.6	L: 57.9 U: 20.2 N:19.9 D: 1.9	L: 60.0 U: 19.6 N: 18.4 D: 2.0	L: 58.2 U: 19.6 N: 20.3 D: 1.9	L: 58.5 U: 19.2 N: 20.0 D: 2.3	L: 59.5 U: 18.8 N: 19.4 D: 2.4	L: 59.8 U: 18.7 N: 18.9 D: 2.4	L: 58.3 U: 19.6 N: 19.8 D: 2.3
Cybersecurity	L: 66.8 U: 7.2 N: 24.3 D: 1.7	L: 65.9 U: 7.5 N: 24.7 D: 1.9	L: 69.7 U: 6.9 N: 21.6 D: 1.9	L: 62.2 U: 8.6 N: 26.6 D: 2.1	L: 66.3 U: 7.0 N: 24.6 D: 2.1	L: 68.3 U: 6.5 N: 22.8 D: 2.5	L: 70.5 U: 6.4 N: 21.1 D: 2.0	L: 67.3 U: 7.6 N: 22.9 D: 2.2
Customer mistreatment	L: 59.5 U: 20.4 N: 18.3 D: 1.9	L: 60.1 U: 18.5 N: 19.8 D: 1.6	L: 61.8 U: 18.0 N: 18.5 D: 1.6	L: 61.1 U: 17.6 N: 19.3 D: 1.9	L: 61.5 U: 18.1 N: 18.5 D: 1.8	L: 61.6 U: 17.2 N: 18.9 D: 2.4	L: 60.2 U: 17.6 N: 20.0 D: 2.3	L: 61.4 U: 16.9 N: 19.3 D: 2.4
Environmental pollution / mismanagement	L: 63.3 U: 15.4 N:19.4 D: 1.9	L: 64.4 U: 14.9 N: 19.0 D: 1.6	: 57.3 U: 16.1 N: 24.1 D: 2.5	L: 64.7 U: 14.3 N: 18.9 D: 2.1	L: 61.9 U: 14.9 N: 21.0 D: 2.3	: 59.9 U: 15.3 N: 22.0 D: 2.8	L: 60.8 U: 15.6 N: 21.0 D: 2.7	L: 59.8 U: 15.9 N: 21.9 D: 2.4
Sustainable & ethical sourcing / packaging	L: 69.8 U:5.8 N:23.3 D:1.1	L: 73.0 U: 4.8 N: 21.1 D: 1.0	L: 66.1 U: 7.2 N: 24.9 D: 1.7	L: 77.7 U: 3.4 N: 17.8 D: 1.1	L: 70.1 U: 5.9 N: 22.4 D: 1.6	L: 65.7 U: 6.1 N: 24.5 D: 1.9	L: 70.5 U: 5.4 N: 22.7 D: 1.5	: 68.4 U: 6.1 N: 23.8 D: 1.7
Animal welfare / Testing	L: 60.7 U: 5.8 N: 23.3 D: 1.6	L: 60.4 U: 12.7 N: 24.8 D: 2.0	L: 54.4 U: 15.7 N: 26.7 D: 3.2	L: 67.1 U: 10.7 N: 20.5 D: 1.7	L: 64.2 U: 11.7 N: 22.2 D: 1.9	L: 58.7 U: 12.7 N: 25.9 D: 2.7	L: 59.4 U: 12.7 N: 25.4 D: 2.5	L: 57.0 U: 14.2 N: 25.9 D: 3.0
Workplace culture	L: 56.9 U: 9.8 N: 31.0 D: 2.3	L: 58.0 U: 8.8 N: 31.1 D: 2.1	L: 59.5 U: 8.3 N: 30.1 D: 2.1	L: 58.5 U: 8.8 N: 30.6 D: 2.0	L: 61.4 U: 7.6 N: 28.8 D: 2.1	L: 62.6 U: 7.5 N: 28.1 D: 1.8	L: 61.5 U: 8.1 N: 28.1 D: 2.4	L: 61.9 U: 8.2 N: 27.7 D: 2.2
Fair Treatment of employees	L: 68.0 U: 7.3 N: 23.5 D: 1.2	L: 67.3 U: 6.7 N: 24.6 D: 1.3	L: 67.3 U: 6.5 N: 24.4 D: 1.8	L: 68.2 U: 6.7 N: 23.5 D: 1.6	L: 68.2 U: 7.6 N: 28.2 D: 2.0	L: 69.2 U: 6.4 N: 22.4 D: 2.1	L: 68.6 U: 6.6 N: 23.0 D: 1.9	L: 68.5 U: 6.5 N: 23.0 D: 1.9
Diversity & inclusion	L: 63.4 U: 7.4 N: 27.1 D: 2.0	L: 62.7 U: 7.8 N: 27.7 D: 1.8	L: 63.2 U: 7.9 N: 27.0 D: 2.0	L: 63.8 U: 7.7 N: 26.5 D: 2.1	L: 64.8 U: 7.8 N: 25.3 D: 2.1	L: 65.0 U: 7.8 N: 24.8 D: 2.4	L: 64.7 U: 7.6 N: 25.4 D: 2.4	L: 64.8 U: 7.9 N: 24.8 D: 2.5
Workplace safety	L: 66.5 U: 7.2 N: 24.5 D: 1.8	L: 65.9 U: 8.8 N: 31.1 D: 2.1	L: 63.8 U: 8.1 N: 25.9 D: 2.2	L: 67.4 U: 7.1 N: 23.7 D: 1.7	L: 68.9 U: 6.3 N: 22.9 D: 1.9	L: 66.5 U: 6.7 N: 25.0 D: 1.8	L: 66.9 U: 7.1 N: 23.9 D: 2.0	L: 66.2 U: 6.7 N: 24.9 D: 2.1
Slave labour	L: 56.1 U: 21.2 N: 19.9 D: 2.8	L: 57.2 U: 19.5 N: 20.9 D: 2.5	L: 55.2 U: 20.2 N: 22.0 D: 2.6	L: 58.6 U: 18.7 N: 20.6 D: 2.1	L: 56.3 U: 19.2 N: 21.8 D: 2.7	L: 56.1 U: 19.2 N: 21.9 D: 2.7	L: 57.2 U: 19.0 N: 21.5 D: 2.4	L: 56.2 U: 18.9 N: 22.1 D: 2.8

L = Very Likely/Likely
N = Neutral
U = Unlikely
D = Do Not Know

We also asked how likely consumers are to use a brand's products or services if it stands for a purpose that reflects their own values and beliefs. An overwhelming **86.1%** say this is likely or very likely to have an impact.

HOW LIKELY ARE YOU TO CONSUME MORE OF A BRAND'S PRODUCT OR SERVICES IF IT STANDS FOR A PURPOSE THAT REFLECTS YOUR OWN VALUES AND BELIEFS?

WHICH INDUSTRIES ARE ACTING MOST RESPONSIBLY?

We took a look at how consumers view the reputation of companies in different sectors.

HOW DO YOU VIEW THE REPUTATION OF

THE AGRICULTURE SECTOR?

Bad	15.2%
Good	74.6%
Don't Know	6.3%

CHARITIES & NGOs?

Bad	13.2%
Good	76.1%
Don't Know	6.6%

THE CLOTHING & FASHION SECTOR?

Bad	13.5%
Good	79.0%
Don't Know	4.6%

THE CONSTRUCTION & ENGINEERING SECTOR?

Bad	14.2%
Good	77.0%
Don't Know	5.4%

THE CONSUMER PRODUCTS SECTOR?

Bad	23.8%
Good	70.4%
Don't Know	5.2%

THE ENERGY SECTOR?

Bad	27.3%
Good	68.0%
Don't Know	4.8%

THE FINANCIAL SERVICES SECTOR?

Bad	18.4%
Good	71.6%
Don't Know	4.2%

THE FOOD & BEVERAGE SECTOR?

Bad	14.2%
Good	78.0%
Don't Know	3.9%

THE GOVERNMENT & PUBLIC SERVICE SECTOR?

Bad	17.9%
Good	70.2%
Don't Know	3.9%

THE HEALTHCARE SECTOR?

Bad	15.6%
Good	76.2%
Don't Know	3.6%

HOW DO YOU VIEW THE REPUTATION OF

THE IT, TECHNOLOGY & TELECOMMUNICATIONS SECTOR?

Bad	10.3%
Good	82.0%
Don't Know	4.4%

THE MANUFACTURING SECTOR?

Bad	14.6%
Good	76.3%
Don't Know	5.6%

THE MINING SECTOR?

Bad	26.0%
Good	56.3%
Don't Know	8.4%

THE PROFESSIONAL SERVICES SECTOR?

Bad	11.0%
Good	80.3%
Don't Know	5.6%

THE RETAIL SECTOR?

Bad	13.6%
Good	79.1%
Don't Know	4.2%

THE TOURISM & HOSPITALITY SECTOR?

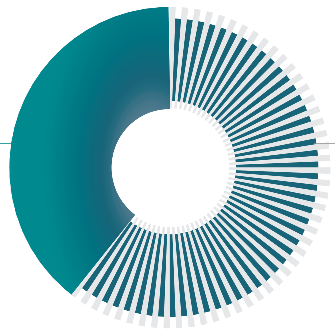
Bad	11.2%
Good	82.1%
Don't Know	3.7%

THE TRANSPORTATION (AIRLINES & SHIPPING) SECTOR?

Bad	11.4%
Good	81.2%
Don't Know	4.1%

We also asked whether consumers believe that SMEs are more social and environmentally responsible than larger companies – with two-thirds of consumers believing this is true.

DO YOU BELIEVE SMES ARE MORE SOCIALLY AND ENVIRONMENTALLY RESPONSIBLE THAN LARGER COMPANIES?



No 41.0%

Yes 59.0%

MOST ADMIRED COMPANIES

We asked respondents to rank the most responsible and trustworthy in the six countries we surveyed.

AGRICULTURE
COFCO
Beidahuang Agriculture
New Hope

CHARITIES AND NGOs
Red Cross
World Wide Fund for Nature
Salvation Army

CLOTHING & FASHION
Uniqlo
H&M
Zara

CONSTRUCTION & ENGINEERING
China State Construction Engineering Corporation
L&T
Tata

CONSUMER PRODUCTS
Nestle
Apple
Google

EDUCATION
New Oriental
MOE
NUS

ENERGY
Total
Shell
China National Petroleum Corporation, CNPC

FINANCIAL SERVICES
HSBC
DBS
China Bank

FOOD & BEVERAGE
Nestle
KFC
McDonald's

GOVERNMENT AND PUBLIC SERVICE
MOE
Amazon
China Government

HEALTHCARE
Bupa
Apollo
SGH

IT & TELECOMMUNICATIONS
Total
Apple
Singtel

MANUFACTURING
Huawei
Apple
Tata

MINING
BHP
Glencore
Rio Tinto

PROFESSIONAL SERVICES
KPMG
Deloitte
Amazon

RETAIL
Walmart
Amazon
Myer

TOURISM & HOSPITALITY
Ctrip
Hilton
Qantas

TRANSPORTATION (AIRLINES & SHIPPING)
Qantas
SIA
Singapore Airlines

We then asked what are the top attributes organisations should display? The word or concept of **'good'**, **'responsible'** and **'honest'** ranked highly.

GLOBAL COMPANIES
Good
Responsible
Honesty

LARGE COMPANIES
Good
Responsible
Accountable

LOCAL COMPANIES
Good
Responsible
Local

MATURE / WELL-ESTABLISHED COMPANIES
Good
Responsible
Honesty

SMEs
Good
Responsible
Honesty

YOUNG / START-UP COMPANIES
Good
Innovative
Energetic

HOW RESPONSIBLE IS RESPONSIBLE?

We now look at whether consumers believe if companies are fully transparent and responsible when it comes to meeting regulatory requirements – the outcome was easy to see. Most consumers believe that companies are just 'box tickers' when it comes to acting responsibly – doing what they is simply required by local regulators.

Sector	**Very responsible** Go well above and beyond what's required by regulation %	**Responsible** Don't do much more than they are required to by regulation %	**Somewhat Irresponsible** Meet regulation requirements but may not be fully transparent %	**Irresponsible** Meet regulation requirements but likely to take advantage of and bend rules %	**Non-compliant** I don't believe they don't comply with all regulations %
Agriculture	19.9	46.0	24.1	7.7	2.4
Construction & Engineering	19.8	43.4	25.7	8.8	2.3
Charities & NGOs	21.8	45.4	22.4	7.9	2.5
Clothing & Fashion	18.8	44.9	26.0	8.2	2.1
Consumer Products	21.7	40.5	29.6	6.6	1.6
Education	23.5	45.6	21.1	7.7	2.1
Energy	17.6	41.6	26.3	12.1	2.4
Financial Services	19.5	39.7	25.9	11.8	3.1
Food & Beverage	20.5	44.0	25.3	8.0	2.2
Government & Public Service	21.4	40.1	24.1	10.2	4.2
Healthcare	24.3	43.6	21.7	8.3	2.1
IT, Technology & Telecommunications	22.8	46.5	21.7	7.0	2.0
Manufacturing	18.5	43.7	26.9	8.9	1.9
Mining	18.5	32.5	28.9	15.1	4.9
Professional Services	20.8	47.0	23.1	7.2	1.9
Retail	18.0	46.7	25.3	7.8	2.2
Tourism & Hospitality	20.7	47.2	23.4	6.9	1.9
Transportation (Airlines & Shipping)	22.1	46.1	23.0	6.9	1.8

WHO DO WE TRUST?

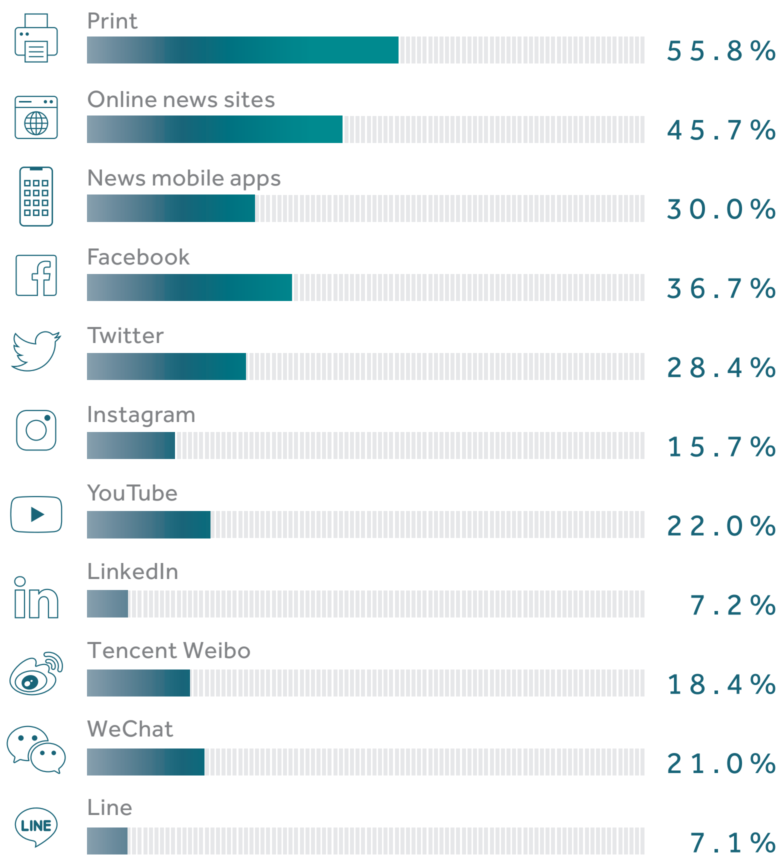
This led us to ask consumers who they trust for news and information. Family and friend rank high, as would be expected, but for communicators it is important to see that company information, although sometimes takes with a "pinch of salt", ranks high as well.

Level of Trust	Family %	Friends %	Government Research %	Politicians %	Company Sources %	Independent Research Companies %	Experts – such as scientists & Researchers %	NGOs %	Celebrities %
Highly Trusted Absolute trust, no doubt in this information	28.3	14.4	19.4	12.5	14.4	19.3	21.5	15.7	14.0
Trusted Trust the information source but still open to other opinions	46.6	51.7	39.4	26.0	33.0	42.7	45.3	39.0	25.8
Neutral I neither trust nor distrust the information source	21.0	26.2	26.7	29.2	36.5	27.5	24.2	33.2	32.3
Skeptical I'm hesitant to always trust information from this source	3.2	6.5	10.9	21.0	13.1	8.6	7.1	9.4	18.7
Untrusted Do not trust this information source at all	0.9	1.2	3.6	11.4	3.1	2.0	1.9	2.6	9.2

WHERE DO WE GO FOR OUR NEWS?

We looked at consumers' preferred news sources and the level of trust in these sources. Reputable or traditional news sources remain the most popular sources of news. However, statistically, across the six markets, there was little difference when it same to the level of trust in traditional media, online news and social media influencers.

WHICH ARE SOME OF THE NUMBER ONE SOURCES OUR RESPONDENTS GO FOR NEWS?



WHICH NEWS SOURCES DO OUR RESPONDENTS TRUST THE MOST?

Level of Trust	Traditional Media - newspapers, magazines & broadcast %	Online News Websites %	Social Media Influencers %
Highly Trusted Absolute trust, no doubt in this information	13.4	13.5	13.1
Trusted Trust the information source but still open to other opinions	36.3	31.6	26.3
Neutral I neither trust nor distrust the information source	33.4	34.6	30.8
Skeptical I'm hesitant to always trust information from this source	13.1	15.8	19.6
Untrusted Do not trust this information source at all	3.8	4.5	10.2

CONTENT SHARING – WHAT DO WE SHARE AND HOW OFTEN?

Consumers are most motivated to share news and information with their peers online OR by word-of-mouth because they believe it is newsworthy or relates to causes they care about. Surprisingly, humour and making people laugh do not rank highly – or this may only be what people wanted our researchers to think.

WHY CONSUMERS NEWS AND CONTENT

(answers based on whether consumers selected yes or no)

Newsworthiness
52.3%

It relates to a cause I care about
51.9%

It relates to a cause my friends / family care about
39.7%

Getting more likes / attention on your social media page
28.3%

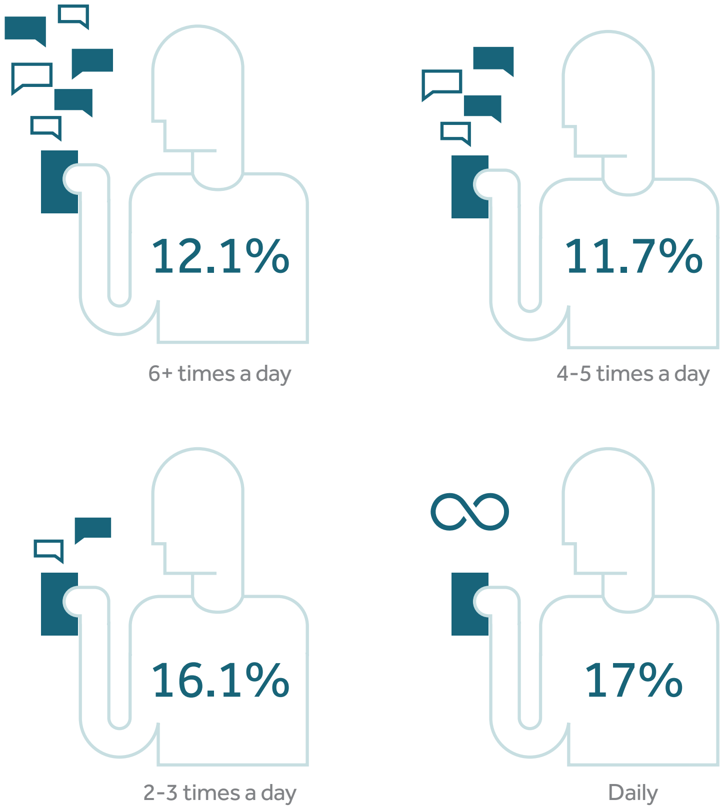
Novelty of advertisements, brand campaigns
25.8%

Humour / amusing / makes people laugh
19.3%

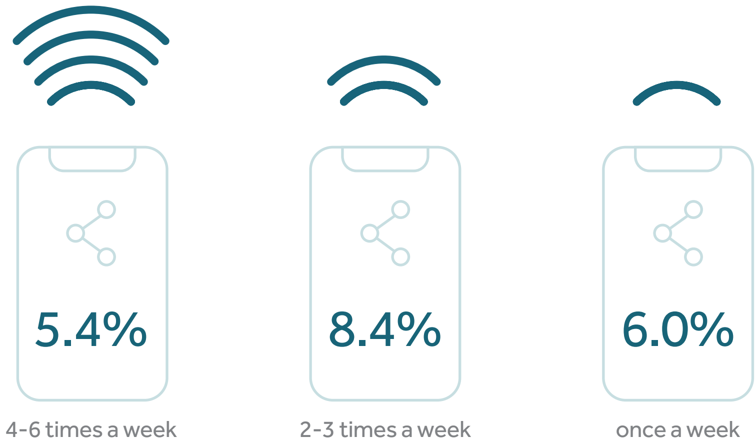
Makes me appear smart and informed
14.6%

HOW OFTEN DO YOU SHARE NEWS AND CONTENT?

Nearly 40% consumers share news and content with their online connections multiple times per day, with more than half (56.9%) sharing content at least once per day



Just under 20% of consumers share content with their online connections multiple times per week, with 6.0% sharing content at least once per week



WHO HAVE WE BEEN TALKING TO ABOUT THEIR EXPECTATIONS?

Based on our research, we looked at some of the key factors that influence the four main generations within each of the six markets we surveyed.

BABY BOOMERS

		AUSTRALIA	CHINA	HONG KONG	INDIA	MALAYSIA	SINGAPORE
		Awareness of United Nations' SDGs: **24.31%**	Awareness of United Nations' SDGs: **77.2%**	Awareness of United Nations' SDGs: **50.34%**	Awareness of United Nations' SDGs: **83.84%**	Awareness of United Nations' SDGs: **53.85%**	Awareness of United Nations' SDGs: **36.81%**
Who holds the most power for ensuring & promoting economic, environmental & social sustainability? (top 3 ranked out of 10)	Government Officials / Ministers	88.67%	66.7%	76.5%	73.7%	87.2%	88.2%
	Head of State	62.4%	76.4%	78.6%	76.7%	79.4%	75.7%
	CEOs	51.5%	46.3%	46.9%	35.4%	30.7%	52.0%
	Media	13.2%	13.0%	11.7%	31.3%	28.2%	14.6%
	Online Influencers	2.5%	7.3%	6.2%	9.1%	15.4%	3.5%
Level of trust in:							
Traditional media – print/broadcast	Highly Trusted	1.38%	13.82%	6.21%	27.27%	7.69%	5.56%
	Trusted	19.61%	43.09%	25.52%	41.41%	53.85%	42.36%
	Neutral	40.33%	36.59%	17.93%	22.22%	30.77%	33.33%
	Sceptical	27.35%	4.88%	44.83%	7.07%	7.69%	15.28%
	Untrusted	11.33%	1.63%	5.52%	2.02%	0.00%	3.47%
Online news websites	Highly Trusted	0.55%	5.69%	5.52%	29.29%	12.82%	5.56%
	Trusted	14.64%	35.77%	19.31%	28.28%	38.46%	22.92%
	Neutral	35.08%	44.72%	44.83%	29.29%	30.77%	45.83%
	Sceptical	35.08%	11.38%	23.45%	12.12%	15.38%	20.83%
	Untrusted	14.64%	2.44%	6.90%	1.01%	2.56%	4.86%
Social media influencers	Highly Trusted	0.55%	10.57%	5.52%	29.29%	2.56%	3.47%
	Trusted	3.87%	33.33%	13.79%	30.30%	25.64%	14.58%
	Neutral	20.99%	43.09%	37.93%	19.19%	30.77%	35.42%
	Sceptical	28.73%	10.57%	31.72%	19.19%	35.90%	35.42%
	Untrusted	45.86%	2.44%	11.03%	2.02%	5.13%	11.11%
What type of content would make them engage with a company or organisation?	Causes I care about	23.9%	51.2%	40%	59.6%	71.8%	42.4%
	News about products & services	10.2%	39.8%	28.9%	44.4%	38.5%	20.8%
	Chance to win prizes	11.6%	16.3%	18.6%	21.2%	30.8%	18.7%
	No interest in engaging	55.5%	9.8%	17.2%	7.9%	5.1%	19.4%

GEN X

		AUSTRALIA	CHINA	HONG KONG	INDIA	MALAYSIA	SINGAPORE
	Awareness of United Nations' SDGs	**23.96%**	**88.0%**	**44.82%**	**81.6%**	**65.73%**	**39.72%**
Who holds the most power for ensuring & promoting economic, environmental & social sustainability? (top 3 ranked out of 10)	Government Officials / Ministers	83.7%	74.3%	71.0%	65.3%	81.8%	82.2%
	Head of State	64.5%	82.7%	80.5%	64.1%	71.3%	74.7%
	CEOs	49.5%	58.7%	50.6%	38.3%	35.7%	49.4%
	Media	20.5%	12.3%	17.4%	28.5%	30.0%	18.0%
	Online Influencers	5.1%	2.3%	4.8%	11.6%	7.0%	7.2%
Level of trust in:							
Traditional media – print/broadcast	Highly Trusted	3.51%	18.00%	3.96%	30.06%	9.79%	6.94%
	Trusted	19.17%	51.67%	23.78%	45.09%	44.76%	43.33%
	Neutral	43.45%	23.33%	19.82%	15.64%	36.36%	36.94%
	Sceptical	23.32%	6.00%	49.09%	5.83%	7.69%	11.94%
	Untrusted	10.54%	1.00%	3.35%	3.37%	1.40%	0.83%
Online news websites	Highly Trusted	3.83%	18.00%	4.27%	36.20%	11.19%	6.94%
	Trusted	18.53%	44.33%	18.90%	33.13%	34.27%	32.50%
	Neutral	41.85%	27.67%	49.09%	21.17%	35.66%	45.00%
	Sceptical	24.60%	8.67%	20.73%	7.36%	18.18%	13.61%
	Untrusted	11.18%	1.33%	7.01%	2.15%	0.70%	1.94%
Social media influencers	Highly Trusted	2.24%	18.00%	4.57%	32.82%	9.79%	4.17%
	Trusted	11.18%	45.67%	15.55%	40.49%	25.87%	22.22%
	Neutral	31.31%	25.00%	43.90%	17.48%	34.97%	38.61%
	Sceptical	30.99%	9.67%	23.48%	6.44%	23.08%	25.83%
	Untrusted	24.28%	1.67%	12.50%	2.76%	6.29%	9.17%
What type of content would make them engage with a company or organisation?	Causes I care about	38.7%	48.3%	40.5%	54.4%	59.4%	42.5%
	News about products & services	38.7%	38.3%	33.2%	35.9%	35.7%	30.3%
	Chance to win prizes	17.3%	16.0%	22.3%	18.4%	27.3%	20.5%
	No interest in engaging	33.5%	8.7%	6.1%	3.7%	0.7%	12.8%

MILLENNIALS

		AUSTRALIA	CHINA	HONG KONG	INDIA	MALAYSIA	SINGAPORE
		Awareness of United Nations' SDGs: **31.53%**	Awareness of United Nations' SDGs: **89.5%**	Awareness of United Nations' SDGs: **60.55%**	Awareness of United Nations' SDGs: **86.51%**	Awareness of United Nations' SDGs: **76.25%**	Awareness of United Nations' SDGs: **51.63%**
Who holds the most power for ensuring & promoting economic, environmental & social sustainability? (top 3 ranked out of 10)	Government Officials / Ministers	72.7%	73.5%	71.2%	57.5%	81.3%	76.0%
	Head of State	56.7%	79.7%	79.7%	58.8%	66.7%	59.1%
	CEOs	47.7%	40.1%		40.9%	32.6%	39.4%
	Media	25.8%	17.5%	13.9%	29.3%	28.2%	32.4%
	Online Influencers	12.0%	3.0%	5.7%	16.7%	10.2%	14.8%
Level of trust in:							
Traditional media – print/broadcast	Highly Trusted	8.11%	15.26%	6.98%	26.64%	17.01%	11.28%
	Trusted	26.43%	42.11%	38.95%	35.37%	40.48%	40.35%
	Neutral	42.04%	30.00%	12.79%	22.71%	32.65%	33.33%
	Sceptical	16.52%	9.47%	38.37%	12.66%	7.14%	12.03%
	Untrusted	6.91%	3.16%	2.91%	2.62%	2.72%	3.01%
Online news websites	Highly Trusted	10.67%	12.11%	6.98%	34.19%	14.97%	11.03%
	Trusted	18.67%	37.37%	36.05%	40.23%	40.48%	34.34%
	Neutral	40.00%	33.16%	38.37%	18.14%	31.63%	39.35%
	Sceptical	24.00%	14.74%	15.70%	4.19%	10.88%	11.78%
	Untrusted	6.67%	2.63%	2.91%	3.26%	2.04%	3.51%
Social media influencers	Highly Trusted	8.00%	14.21%	5.21%	37.91%	17.01%	8.52%
	Trusted	13.33%	31.58%	21.10%	35.81%	35.03%	26.57%
	Neutral	41.33%	39.47%	40.55%	14.42%	26.53%	36.34%
	Sceptical	21.33%	11.05%	24.38%	9.30%	16.67%	19.80%
	Untrusted	16.00%	3.68%	8.77%	2.56%	4.76%	8.77%
What type of content would make them engage with a company or organisation?	Causes I care about	45.6%	54.5%	16.6%	52.4%	58.1%	48.6%
	News about products & services	45.6%	40.4%	15.5%	38.4%	34.3%	82.4%
	Chance to win prizes	20.1%	14.6%	7.7%	33.6%	25.5%	25.4%
	No interest in engaging	18.9%	2.3%	2.2%	3.9%	2.4%	4.2%

GEN Z

	AUSTRALIA	CHINA	HONG KONG	INDIA	MALAYSIA	SINGAPORE
Awareness of United Nations' SDGs	**34.67%**	**78.9%**	**60.47%**	**75.98%**	**72.11%**	**48.59%**

Who holds the most power for ensuring & promoting economic, environmental & social sustainability? (top 3 ranked out of 10)

	AUSTRALIA	CHINA	HONG KONG	INDIA	MALAYSIA	SINGAPORE
Government Officials / Ministers	69.3%	75.8%	73.2%	64.6%	78.7%	72.2%
Head of State	60%	82.6%	86.0%	58.9%	66.2%	66.4%
CEOs	44.0%	42.3%	47%	33.6%	25%	45.1%
Media	25.3%	18.4%	19.2%	35.4%	31.2%	23.8%
Online Influencers	9.3%	4.2%	5.2%	12.7%	11.3%	10.5%

Level of trust in:

Traditional media – print/broadcast

	AUSTRALIA	CHINA	HONG KONG	INDIA	MALAYSIA	SINGAPORE
Highly Trusted	8.00%	18.51%	6.30%	33.26%	16.25%	8.45%
Trusted	21.33%	43.19%	29.86%	40.93%	40.00%	38.73%
Neutral	46.67%	28.53%	17.53%	18.60%	27.50%	28.87%
Sceptical	17.33%	7.46%	42.74%	5.58%	13.75%	20.42%
Untrusted	6.67%	2.31%	3.56%	1.63%	2.50%	3.52%

Online news websites

	AUSTRALIA	CHINA	HONG KONG	INDIA	MALAYSIA	SINGAPORE
Highly Trusted	6.31%	20.31%	5.48%	26.64%	15.00%	9.86%
Trusted	25.83%	41.13%	30.41%	37.99%	33.75%	35.21%
Neutral	42.04%	25.19%	39.45%	21.40%	26.25%	35.21%
Sceptical	20.72%	12.08%	19.45%	11.35%	20.00%	15.49%
Untrusted	5.11%	1.29%	5.21%	2.62%	5.00%	4.23%

Social media influencers

	AUSTRALIA	CHINA	HONG KONG	INDIA	MALAYSIA	SINGAPORE
Highly Trusted	6.31%	18.51%	8.14%	25.33%	11.25%	11.27%
Trusted	16.52%	40.36%	27.33%	35.37%	30.00%	26.06%
Neutral	36.64%	28.02%	31.40%	24.89%	36.25%	29.58%
Sceptical	25.53%	10.28%	27.33%	10.04%	15.00%	25.35%
Untrusted	15.02%	2.83%	5.81%	4.37%	7.50%	7.75%

What type of content would make them engage with a company or organisation?

	AUSTRALIA	CHINA	HONG KONG	INDIA	MALAYSIA	SINGAPORE
Causes I care about	29.3%	47.9%	39.5%	57.2%	53.7%	47.6%
News about products & services	22.6%	38.46%	30.8%	33.7%	37.5%	29.3%
Chance to win prizes	13.3%	13.7%	16.4%	10.5%	22.5%	19.3%
No interest in engaging	22.7%	3.7%	4.6%	0.2%	3.7%	7.4%

IN CONCLUSION

We hope you enjoyed this study and found the expectations of consumers in Australia, China, Hong Kong SAR, India, Malaysia, and Singapore of interest. Clearly, companies, governments and NGOs can all learn from this study – what major issues concern consumers; their expectations of organisations and individuals; who they believe holds the most power; the content they want and trust; and their concerns about privacy.

Sandpiper is a strategic communications consultancy based in Asia Pacific and operating globally. We draw on rich, data-driven insights and research to inform our advice, and deliver measurable value. We use our shared experience to make sense of the challenges our clients face in a time of unprecedented change. We work as a single, global team with one P&L. This allows us to meet the needs of our clients flexibly, quickly and effectively wherever they are in the world.

In addition to this six-market report, we are publishing reports on each individual market plus sector reports, including financial services, healthcare and travel and tourism. Please get in contact with us if you would like to be on our mailing list for these reports.

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About This Study

To conduct this study we conducted an online survey with 5,680 consumers in nearly equal numbers from Australia, China, Hong Kong SAR, India, Malaysia and Singapore in late 2019. Depending on population size and complexity, a sample size of between 500 and 1,000 respondents was surveyed to provide statistically significant findings which can be extrapolated to the general population. In addition, age and gender quotas were set based on their respective proportion of the population.

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