An exploration of culture, context and trends
“OUR CHOICES CONSTRUCT OUR RELATIONSHIPS, CAREERS, WORLD-VIEWS, AND IDENTITIES – WE ARE THE SUM OF OUR CHOICES.”

Sheena Iyengar

An Introduction

Following our Global Trends Briefing in 2018, we asked our attendees to choose the theme for 2019 based on a number of options, of which ‘choice’ was the winner.

Choice won the vote because of its relevancy and complexity in today’s consumer landscape. With so much NPD and ease of access to new products and services, choice is both a celebration and a burden for consumers. As a response, we are seeing the likes of Google, Alexa, influencers and algorithms offering curated and personalised options to solve the paradox of choice. However, for brands this poses a challenge: how do we stay in consumers’ increasingly discerning consideration sets?

Through our own research and close connection to our online communities, we have identified ‘choice overload’ as an issue manifesting globally, but the way in which people react to it depends on the country and culture in question. This means brands must understand choice both as an evolving human need, and at a local level, to act in the most meaningful way.

In this study, we deep dive into the cultural nuances of choice in the UK, US, Germany, Mexico and China, to answer the question of what choice and choice overload means to consumers in each country, and what challenges and opportunities this creates for brands.

We hope you enjoy reading this report.

Kate Skivington
Culture & Trends strategist and Cultural Clarity lead, Join the Dots
ABOUT THIS REPORT

Our Global Trend reports are a series of studies by the Culture & Trends team at Join the Dots. We are experts in trends and cultural understanding, with a unique approach to mapping and predicting consumer behaviour at a macro and micro level.

Our experience begins with our online research communities, which provide a window into the lives of tens of thousands of people, allowing us to spot trends as soon as they emerge. We analyse this rich stream of information through our cross-cultural trends framework – all grounded in positive psychology. The framework, consisting of 14 universal consumer needs (below), is our process of identifying and tracking consumer trends and making them relevant for brands and marketers.

The purpose of this report series is to understand consumer needs across the globe. For each report, we take a need from our framework, then explore it in detail via a global study, uncovering its commercial opportunities.

In 2018 we explored individuality. This report explores choice.
THE APPROACH: CULTURAL CLARITY

As a team, we are experienced in applying multiple methodologies from semiotics through to future forecasting. To deep dive into ‘Choice’ and get to the heart of what it means to consumers today, we applied our Cultural Clarity model. The approach examines three key areas: trends, culture, and context.

Firstly, we look at the shifts and trends happening at a macro, global level.

Then we conduct cultural research, to understand the underlying drivers and values influencing consumer attitudes in each market. Here, we draw upon our community of articulate, culturally savvy leading-edge consumers (known as Illume Guides) to provide a perspective on the emerging trends and shifts in their market. In this case, we explored cultural attitudes toward choice.

We then illustrate all of our findings with context, evidence and examples of how these behaviours are manifesting in-market.

It is through these three insight streams that we have arrived at this report.

Thinking global, acting local

Our report findings show ‘Choice’ is a global need, but how consumers perceive and cope with choice depends greatly on the culture in question. These cultural nuances are fundamental for brands to be aware of, if we are to connect with consumers in a culturally relevant way.

So, on to the report...
THE IMPORTANCE OF CHOICE

The paradox of choice

Choice is defined as ‘an act of choosing between one or more possibilities’ and is closely tied to autonomy and personal responsibility. As humans, having choice comes with maturity, and the choices we need to make grow in number and magnitude until we are faced with choice every single day in our adult lives. From this perspective, choice seems like it is fundamental to our happiness – it means we have developed as humans, have a purpose in life and are ultimately free to do as we wish.

However, many studies exist evidencing the damaging effects of choice on human happiness. This is the phenomenon of ‘choice overload.’ For example, according to Barry Schwartz, a leading American psychologist, having lots of choice increases our pressure to weigh up all the options in detail in order to choose the ‘perfect’ one – often which does not exist. This leads to dissatisfaction and self-doubt over our final decision. Furthermore, too much choice can lead to ‘behavioural paralyses’ – a term coined for people so overwhelmed by options they fail to make a decision altogether.

Another thought-leader in this area, Sheena Iyengar, drew similar findings in her seminal study on jams. In the study, consumers were presented with either 24 or six types of jam at a food market. Whilst more consumers were initially attracted to the larger display of jams, only 3% made a purchase here, in contrast to 30% from the smaller selection.

Both of these studies highlight the damaging effects of excessive choice. It either produces ‘choice paralyses’ – preventing us from making a decision, or it reduces our satisfaction when we do make a decision, making us question whether we made the right choice.

An increasing issue

Whilst brands and marketers have understood ‘the paradox of choice’ for some time, now, it’s arguably more of a problem than ever before. We live in a world dominated by the likes of Amazon and Alibaba, where consumers are accustomed to scrolling through lists of products - making trade-offs, comparisons, and weighing up the potential negative consequences and risks associated with choosing one product over another. We are expending a mass of mental energy on these decisions, and it can be counter-intuitive. As more brands, options and NPD become available to us, the risk of choice overload is becoming more immediate.

Worryingly, a recent global report found that 54% of consumers have stopped purchasing products from a brand or retailer website because choosing the right product was too difficult. Similarly, 42% admitted to abandoning their cart altogether.
THE BRAND CHALLENGE

For brands, this poses a huge challenge: how do we provide our consumers with the options they crave, whilst preventing the negative consequences of choice overload?

To navigate this problem, some brands are taking action with relative success. For example, P&G famously reduced their Head & Shoulders range from 26 variations to just 15 - increasing sales by 10%. The learning here is not simply to offer fewer products, but instead to understand where choice overload occurs in our purchase journey, and help consumers navigate it.

Another example is subscription service Mubi. With brands like Netflix featuring hundreds of films, Mubi cut through by offering only a small selection of critically-acclaimed films, as well as featuring a ‘film of the day’ to help consumers make an easier, more informed choice.

This comes off the back of more consumers looking for advice, filters and helpful dialogue from brands to help them make a better decision. In a recent global report, 68% of shoppers said they want their favourite brands or retailers to provide them with honest and personal advice, while 44% expect proactive product recommendations and tips when shopping online.

This need for advice is becoming even more necessary as issues like health and sustainability increasingly influence decision-making. In our current climate, more consumers are thinking about the impact of their choices on wider society. The latest figures from a survey in the US and UK suggest that 88% of consumers want brands to help them make this kind of ethical choice. One example of how brands are responding to this emerging attitude are apps such as Giki and Think Dirty – they rate products not on price, but on whether a product fits with what you care about, e.g. cruelty-free, carbon-neutral, natural ingredients.
MEASURING CHOICE CROSS-CULTURALLY

This view of choice we’ve explored thus far is largely biased towards a Western perspective, where affluence and rising individualism means we’re surrounded by endless options. However, this isn’t necessarily reflective of how other cultures perceive and respond to choice. As this report goes on to show, the way consumers respond to choice depends on their culture and context.

Beyond the West

In non-Western societies that are collectivist in nature, choice has traditionally been viewed as less about the individual, and more about what is best for the group or society as a whole. Consumers here are therefore more likely to purchase products in the interest of their wider society, rather than only for their own benefit. Interestingly, one study found that negative feelings towards choice (such as regret and dissatisfaction) are more prominent amongst Western respondents than their Chinese counterparts.

As well as deeply held cultural beliefs, perceptions can also shift depending on the situational context that people live in. For example, in another study by Sheena Iyengar, respondents in ex-Communist countries in Eastern Europe were faced with seven soft drink options. Of all these products, they only saw one choice available - a soft drink. This lack of perceived choice is in stark contrast to capitalist societies like the US where individuals felt they had seven options according to each brand or SKU.

These findings show that choice is complex, and attitudes towards it differ across the globe.

So with this in mind, all of our research lead us to the questions...

In a world where there is rapid globalisation, is the human need for choice universal? Does choice overload exist globally? How are cultural attitudes toward choice shifting, and how can brands stay ahead?

To answer these questions, we carried out a nationally representative survey with 6,000 people across our chosen five markets: UK, US, Germany, China and Mexico. We replicated the famous soft drink study by Iyengar, facing respondents with seven soft drink options and questioning how many options they saw – testing their perceived choice. We also asked respondents how they felt about choice based on a number of different emotions.

The study highlighted fundamental differences in attitudes toward choice in each market. We found an important polarisation in views, with respondents from Western cultures (UK, US, Germany) more negative in their emotions than those of non-Western cultures (China and Mexico). To understand more about these emotions, we worked with our Illume Guides to explore the cultural and wider forces of change shaping attitudes towards choice in the UK, US, Germany, China and Mexico. Over the following pages we share our findings, and go on to coin a trend unique to each market. Each trend captures the sentiment toward choice in each market and opportunities it unveils for brands.

The findings demonstrate the value of taking a local market perspective on global trends.
As an individualistic country, personal choice is encouraged in UK culture, and people are generally expected to think for themselves and uniquely contribute to society.

However, this isn’t viewed as a luxury for everyone as class consciousness still exists in the UK today and often creates barriers to social mobility depending on the area you grew up and what ‘class’ you are considered to be from.14,15

As a result, British people tend to view their options as static, rather than something they can control and change – being taught to respect the social order is most clearly seen by the fact there are thought to be somewhere between 6-11 different social classes in the UK.16

In addition, there is a tendency towards stoicism and intolerance for ‘fuss’, which is also unique to the UK – having a choice is often seen as an obstacle to getting on with things. As a nation the UK was subjected to rationing and conscription, illustrating that on hard times, people typically default to a state of ‘muddling through’ as they believe personal energy is quite frankly, better spent elsewhere.

British people therefore tend to be quite adaptable when it comes to making choices in the absence of information, flexing their approach to suit the situation and dealing with decisions in the best way they can.

Our research shows that UK respondents were the most frustrated when it comes to choice, particularly the 55+ generation. This isn’t surprising given that a looming Brexit is creating uncertain times in the UK, and this is influencing how people view and respond to choice. The delay of the decision to leave the EU is frustrating both sides given that such a momentous choice was placed into the hands of the general British public in 2016. Many feel that the lack of action is undermining the choice that was made and this is particularly frustrating the older generation of whom 61% of those aged 65+ voted to leave the EU.17

British people are becoming increasingly negative towards choice as a result – it is currently draining any optimism about the future of the UK, as they are yet to see an outcome. Big life decisions are requiring more energy as social and economic concerns mount over the implications of leaving the EU, and many choices are being put on hold in the absence of any certainty.18,19

This is having an effect on how people in the UK view consumer choice. Consumers are tired of feeling tied into experiences that restrict our ability to choose what we want to do. At the same time, consumers are primed to expect brands to make each choice extremely easy, and don’t want to waste their limited time and energy sifting through options.
UK consumers are seeking out simplicity in a time where they don’t need an added layer of stress and complexity in their lives. They expect brands to make each choice extremely easy, and specific to their needs in that moment, as they don’t want to waste their limited time and energy sifting through options. British consumers are demanding the right option for them, on their own terms. Disruptor brands like Thread, giffgaff and Bulb are leading the way here offering simple, flexible solutions for the consumer, while established brands are innovating to help consumers navigate choice more easily, e.g. AutoSergei by Compare the Market, and the BBC Tellybox app.

Brands will succeed in the UK by offering consumers solutions that don’t overcomplicate, over-claim or over-sell, and instead put the power back in the hands of the consumer.

There are more companies popping up that help consumers save time to sort out things, e.g. Bulb offer a simple, single tariff for electricity.

Tash, Illume Guide, Manchester

We are becoming very distracted by the little things, leaving the big things not solved, as we no longer have the time to think of the big things.

Tash, Illume Guide, Manchester
CHOICE IS A CONSTITUTIONAL RIGHT

The US is the most individualistic culture in the world, with a pioneer spirit that has given rise to the belief in personal autonomy and individual choice in the America we see today. At the core of this belief is the ‘American Dream’, which states that everyone has the same choices as each other, and the key to unlocking these is through hard work and determination. Choice is viewed as a constitutional right for many Americans and in our research, the main word that US respondents associated with choice was ‘freedom’.

There is a belief that restriction of choice is a threat to personal liberty. From our research, US respondents were the most positive about choice out of the Western cultures, and were the least worried of all the markets – indicating the cultural importance they attach to choice. Consumers in the US have more.

This freedom of choice is most clearly seen in the mass consumerism that defines US culture. Burger King’s original motto was “Have it Your Way” and Starbucks claim that “Happiness is in your choices”. People in the US have a vast choice of brands and SKUs to choose from, and this provides an illusion of choice which is so fundamental to the happiness of consumers, when in reality most brands are owned by a small number of corporate giants.

BEYOND THE MYTH OF ABSOLUTE CHOICE

Although we saw positivity towards choice in the US, this is starting to shift slightly in an era of extreme politics and a widening wealth gap. Gen Z in particular were the generation most worried about choice in our research.

Although American society is built on the belief that everyone has access to the same choices, many Americans are finding that they don’t have the same choices available to them as the elite. This truth was recently highlighted by the college admissions bribery scandal, which revealed the widespread practice of wealthy parents donating huge sums to colleges in exchange for a guaranteed place for their child. There is a feeling that equal choice for everyone is a myth, and this is causing backlash in many areas of US society.

Trust in institutions and the media is also eroding, as consumers receive ever growing volumes of information – a recent survey found that 7 in 10 Americans struggle to navigate through the abundance of information available to them. As a result, Americans are finding it challenging to make sense of all of it, and knowing which choice is the ‘best’ is becoming increasingly stressful, particularly with the added pressure of time constraints.

This has created an environment in the US where choice overload is rife, but unlike the UK where simplicity is key, consumers in the US want to know that their specific needs have been catered for.
TREND: CHOSSEN FOR ME

People in the US are demanding choice on their terms – they don’t want to be hoodwinked by the ‘wrong choices’, and equally, they don’t want to be ignored, as each American deserves choice. This is creating the perfect environment for disruptor brands to shake up the consumer market. Subscription brands like Dollar Shave Club, are making an impact in the US market as consumers demand choice that is hyper-personalised, trusted and ultimately saves them time.24 Interestingly, Trader Joe’s has also recently been hailed America’s favourite grocery brand based on its small format and limited offering, with the retailer reinvesting back into customer service and product quality so consumers feel like they’re getting the ‘best’.25

Brands that are able to create a hyper-personalised, trusted and convenient service in the US are likely to get ahead as consumers feel jaded about navigating a mass of choice that often does not even fit with their needs.

Choice is super important to people in the US...we’re the land of the free.
Ben, Illume Guide, Atlanta

You are taught that you have every choice available to you, but this is myth, unless you’re one of the privileged in society.
Ben, Illume Guide, Atlanta
Our research found that Germans were significantly more neutral about choice than other markets. Looking at German core culture, this is reflective of how Germans view decision-making, as they are one of the most risk-averse countries in the world, preferring to rely on rational thinking and expertise. Germans tend to have a natural suspicion of being ‘sold to’ and often question claims. Given their trust in expertise, they are taught to seek out quality products and rewards and ‘Made in Germany’ is an important shortcut to determining this. One of the most trusted sources is Stiftung Warentest, which is an independent organisation that tests goods and services in an unbiased way.

For a brand in Germany to be considered as a legitimate choice, functional information and expert credentials are key – ‘qualität vor quantität’ (‘quality over quantity’) is a well-used phrase in German culture so less is more when it comes to the German market.

Although this control over personal choice is particular to Germany, there’s an interesting shift happening in the market currently, related to how Germans are navigating choice in an increasingly convenience-driven society.

German people are known for seeking out efficiency, which has led to the success of Amazon in the market as more consumers move online for convenient product comparison and delivery options. But, within this increased convenience comes the potential to lose control of ‘choice’ and many Germans are worried about this – for example, recently Amazon Dash was banned in Germany by the supreme court on the basis that it takes control away from the German consumer.

Another interesting shift in Germany is the issue around government control of public consumption, with the government heavily tackling plastic use, certain cities banning diesel cars and controversial talks over reducing the autobahn speed limit. While these decisions are polarising because they remove control from the public, many see this as the government making a better choice for them.

This governmental intervention is influencing how the population are viewing their own personal consumer choices - Germans have always valued the environment, but now more of the population than ever state they would be willing to pay a premium for environmentally friendly products.
TREND: SMART CHOICE

Germany is a market where a ‘good’ choice is one that has been made rationally and where the consumer feels in control. For brands, it is about connecting with consumers on a rational level and putting them in the driving seat of making a choice, e.g. German brands like the mobile-only bank N26, and Klarmobil focus on messages like ‘no bullshit’ and ‘no hidden costs’ in their claims and communications.\(^{35,36}\)

Germany also stands out among all the markets we looked at as for many, choice is about the wider societal impact as much as it is about what is best for the individual. In Germany, it is important for brands to help consumers make the ‘right’ choice through providing transparent information about sustainability that helps put them in control of this decision.

To be successful in Germany, brands need to be specific about what they offer and provide detail for the rational German consumer. It shouldn’t be a product for everyone as Germans won’t trust this.

Christina, Illume Guide, Hamburg

We have positive restrictions on choice, e.g. plastic bottles need to be recycled and you have to pay for that. In Germany, the government influences your choice to use plastic bottles, but I support it.

Susan, Illume Guide, Hamburg

German court says Amazon’s Dash buttons violate consumer protection law

German city of Stuttgart bans older diesel vehicles from April 1
Despite being one of the largest economies in the world, the majority of the Mexican population is in the lower socioeconomic bracket due to lack of labour wage regulation, employment rights and social welfare from the government.37

Given the difficult social and financial conditions that many face, there is a lack of opportunity when it comes to earning a living, so choice isn’t considered accessible for many Mexicans. The approach is to take what you can get to make money and get by. As a result, an informal economy has developed where businesses and sole traders operate without government regulation – this provides over 60% of the jobs for people in Mexico.38

Choice is closely related to financial situations and Mexicans are traditionally brand loyal in their preferences – their attitude is to spend the money they do have on a trusted brand. The proverb ‘Lo barato queda caro’ translates as ‘cheap is expensive’, illustrating the value Mexicans place on making their money go a long way.

This precarious situation in Mexico has also given rise to widespread violence and crime, meaning quality of life and individual choice in certain areas is further restricted. People tend to rely on themselves and their close-knit communities to get by, with family and religion being an important influence in the lives of many Mexicans.39

From a cultural perspective, it is important for brands to understand the financial barriers that many Mexicans face when considering how they navigate choice.

Despite the hardships that come with living in Mexico, we found that Mexican consumers are significantly more positive about choice than the other markets we looked at, specifically feeling more happy and excited. When we looked more closely at this, the word that was associated frequently with choice was ‘opportunity’.

Looking at the Mexican economy currently, we can see why Mexicans view choice as a sign of upward mobility and increased opportunity, as well as an indication of an optimistic future for Mexico. One reason for this is the influence of US brands and investment that is flooding the market – as a result, shopping malls and hypermarkets are popping up across Mexico, offering not only more jobs, but a variety of products for different income levels.40

Access to more consumer goods combined with a significant proportion of the population using social media41 means that younger Mexicans in particular are more open to trying new brands and products. YouTube is a growing channel in Mexico where influencers showcase the latest products – beauty vloggers like Yuya and CaELiKe boast huge followings, presenting choice in an entertaining and accessible way.

With access to a wealth of choices through social media, we’re also seeing that Gen Z in Mexico feel slightly more negative about choice – they were the generation to feel the most frustrated in our research, suggesting that this presentation of choice is starting to become overwhelming for them, especially with the limitations of affordability.
TREND: CELEBRATE CHOICE

While Western markets see too much choice as negative, Mexicans see it differently. As a country where many have struggled for decades, the investment and subsequent choices that have become available, is something to celebrate.

For brands, it is all about presenting choice in an exciting way to optimistic consumers by celebrating new products and opportunities, while also being mindful of the existing income disparity. Brands that provide options for all income levels are likely to get ahead, especially for Gen Z who are feeling the pressure to be seen with the latest and greatest from social media.

Mexicans like buying things that are new and are open-minded about products coming onto the market...even if they don't have a lot of money.
Ale, Illume Guide, Mexico City

Money and class influences choice in Mexico as it impacts what you can do and where you live.
Ale, Illume Guide, Mexico City
COLLECTIVISM OVER INDIVIDUAL CHOICE

As a collectivist country, China traditionally views choice as doing what is best for the family, community and harmony of wider society. Confucianism teaches that there is an order and hierarchy essential to the functioning of society, with everyone having their own role to play – as a result, people are expected to understand the total consequences of their individual choice, not just on them, but on the collective group.42

The concept of saving face is also influential in how people view choice in China. In a success-driven society, this means that the prospect of making the wrong choice may not even be worth the decision to do it at all due to the reputational damage this might cause. Children growing up in China are often taught to follow the decisions made for them by their elders, to avoid any potential loss of face.

Under communist control since 1949, the people of China have often had strict restrictions placed on their lives through choices made by the government, most notably that of Mao who kept a tight control on food, housing and education. The one-child policy that came into force after Mao’s rule is another example of how individual choice in China is viewed as secondary to what is perceived as ‘best’ for society.43

A NEW WORLD OF CHOICE IS STRESSFUL

China has dramatically changed in the last two decades with the government heavily investing in private enterprise and consumerism, as well as loosening restrictions on the Chinese people.44 China is one of the fastest growing economies in modern times and this has had a huge influence on the people as they’ve suddenly been exposed to a vast amount of consumer choice, with e-commerce giants like Alibaba, Tencent and JD making it possible to compare and choose from thousands of options.

We found that the older generation are the most positive about all of this choice, likely because they’ve experienced life without it. Conversely, the younger Chinese respondents were more likely to view choice negatively, even more so than the Western countries. They feel worried, sad and resigned about choice as they’re faced with so many options. They don’t know which way to turn and what is ultimately going to lead them to success in a competitive society. Faced with busier lives, the energy and time needed to help navigate through the noise is becoming a real source of stress for many Chinese consumers.45

To help make ‘better’ choices, many consumers are turning to KOLs (key opinion leaders) and influencers as trusted figures to provide guidance about what they should buy and why.46 Similarly, platformisation is increasingly becoming a reality in China, with apps like WeChat and Tencent QQ enabling consumers to make everyday choices in one place further removing the stress of filtering through multiple channels.47

Chinese consumers are also becoming more sophisticated in their choices – previously price-driven, middle class consumers now seek higher quality products, spurred on by increasing concerns about counterfeit goods, food safety and increasingly, the environmental impact of their industries.48
TREND: GUIDED CHOICE

Consumers in China are facing choice overload in a different way to the Western world. Almost overnight, they’ve been bombarded with choice and they’re finding that they’re having to learn quickly as they go to navigate through it all. The added societal pressure of making the ‘right’ choice to save face and succeed is a huge area that Chinese consumers need help from brands on, especially as they become more time poor.

Partnering with key opinion leaders and influencers is key to helping consumers cut through to your brand, as this delivers trustworthy guidance in a sea of thousands of options. Similarly, brands should be aware that price doesn’t always dictate choice in China – consumers are increasingly demanding better quality, safer and more sustainable products.

Choice in China is about taking responsibility and doing something you won’t regret. People want to make the right choice because of social pressure to succeed in China.

Minzhi, Illume Guide, Beijing

Younger people in China have more freedom of choice than the elder generation, so they’re more heavily influenced by trends and what is cool.

Shaun, Illume Guide, Shanghai
**IMPLICATIONS**

In a world where we are constantly fed new information, new products and new ways of thinking, the global trend of choice overload will continue to be a challenge for brands. Ensuring they remain in reduced consideration sets will be key, as consumers seek to navigate growing options available to them.

It is far too simplistic to assume ‘less is more’ when it comes to marketing in a world of choice overload. Instead, brands must think about how they can help consumers make a choice through how they present information and how they expect consumers to navigate through this. Focusing on personalisation, website navigation, and pricing are all ways to reduce the stress of making a choice, whilst also acknowledging that increasingly, consumers are wanting to make better choices for their health and for the environment.

From our exploration of choice within these five markets, we can also see how the trend of choice overload differs greatly given the cultural context, from celebration of the variety of choice in Mexico, to making rational choices in Germany.

For brands, this report reveals the importance of understanding trends from a cultural perspective, as this will uncover unique opportunities for more meaningful and culturally relevant connections. The key to achieving this depth of insight lies in applying Cultural Clarity to universal consumer needs – through working with local market cultural guides and having an applied understanding of trends.

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**THANK YOU**

*Join the Dots* is a global, full-service consumer insight agency. We help clients make better business decisions through a deep understanding of people. With offices in Manchester, New York and Singapore, our Culture & Trends team ensure our research has a local perspective, on a global scale.

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