

Global Citizens & Data Privacy

DAVOS 2019

An Ipsos-World Economic Forum Project

Project Description

- Ipsos and the World Economic Forum are launching a research program to track and decode public understanding and acceptance of new technologies across the globe
- New findings are to be released every six months
- This report features the results of the first wave of research on Data Privacy that we were unveiled at Davos 2019
- This first study was conducted in October-November 2018 among more than 18,800 adults in 26 countries

Headlines

World citizens are in the dark about how their personal information is used

Most people do not trust how organizations use their personal data

Consumers ask for transparency and assurances of confidentiality and security

The public values privacy and compensation more than the benefits of sharing personal data

Key Findings (1): Ignorance and Distrust

Citizens are in the dark about how their personal information is used, most of all in economically advanced countries

- Most adults surveyed across the world proffer knowing little or nothing about how much personal data companies and governments hold and how they use it
 - Only one in three adults globally have a good idea of how much personal data companies hold about them (35%) or what they do with it (32%)
 - Even fewer have a fair idea of how much personal data national and local authorities hold about them (27%) or what they do with it (23%)
- Knowledge is generally lower in countries where personal data is more regulated
 - Fewer than 20% in Japan, Australia, Belgium, Canada and Germany have a good idea of what companies do with their personal information vs. more than 45% in China, India, Malaysia and Saudi Arabia

Trust is lacking, especially toward media companies and foreign governments

- In most countries, citizens tend not to trust companies and governments to use the information they have about them “in the right way”
 - On average, only 36% trust various types of organizations with how they handle personal data
 - Trust is lowest for foreign governments (20%), and only a minority of citizens trust national government (39%)
 - Trust is also low for media companies (24%) and search and social media sites (28%)
 - It is notably higher for healthcare providers (59%) and financial services companies (47%)

Key Findings (2): A Call for Transparency

Consumers value privacy and compensation more than see benefits to sharing personal data

- Globally, most consumers agree that allowing companies to use personal data is something they should be able to refuse (62%) and that they should be paid or rewarded for it (54%)
 - Only about half as many agree it helps consumers save time (35%) or save money (28%)
 - Just 23% agree that it doesn't bother them while twice as many (44%) disagree

Transparency and assurances of confidentiality and security can best allay concerns around usage of personal data

- Consumers are especially likely to say that they would be more comfortable sharing personal information with a company if it is clear about how it will use the data (67%), promises it won't share the data with third parties (64%) or has never experienced security breaches (62%)
 - More so than having a lot of experience with it (61%) or being offered some financial compensation (60%)

Only one in three adults globally have a good idea of what data companies hold about them or what they do with it

How much data companies hold about you



Know a
great deal or
fair amount

Your rights over the way companies handle your personal information



What companies do with the data they hold about you



How long companies can keep the data they hold about you



How you can access, change or delete the data that companies hold about you



With whom companies share the data they hold about you or whom they sell it to



■ A great deal

■ A fair amount

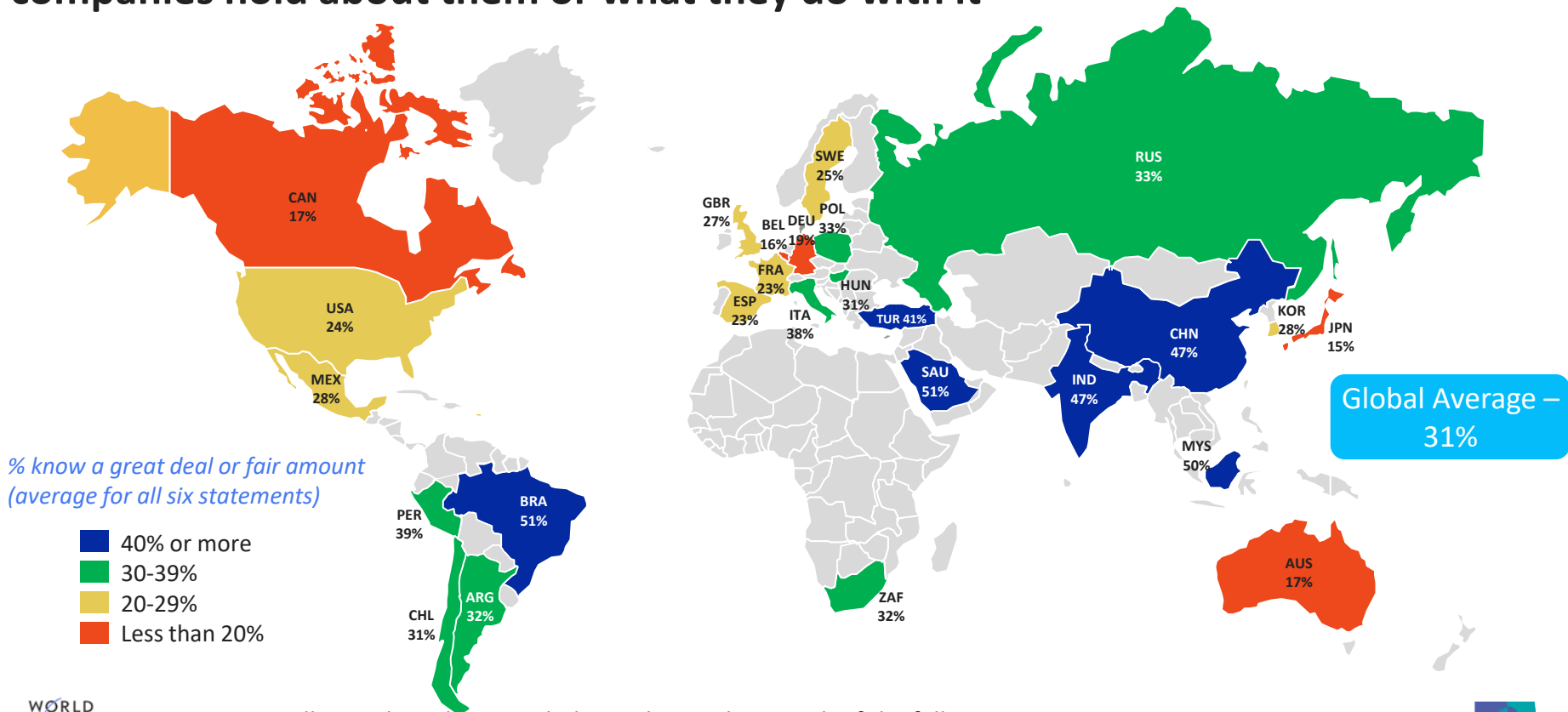
■ A little

■ Nothing at all

Q1. Generally speaking, how much do you know about each of the following...

Base: 18,813 adults aged 16-64 across Argentina, Australia, Belgium, Brazil, Canada, Chile, China, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey, United States. October-November 2018

High-income country citizens are even less likely to say they know what data companies hold about them or what they do with it



Only about one in four adults globally have a good idea of what data authorities hold about them or what they do with it

How much data national and local authorities hold about you



Know a great deal or fair amount

How long national and local authorities can keep the data they hold about you



Your rights over the way national and local authorities handle your personal information



What national and local authorities do with the data they hold about you



With whom national and local authorities share the data they hold about you or whom they sell it to



How you can access, change or delete the data that national and local authorities hold about you



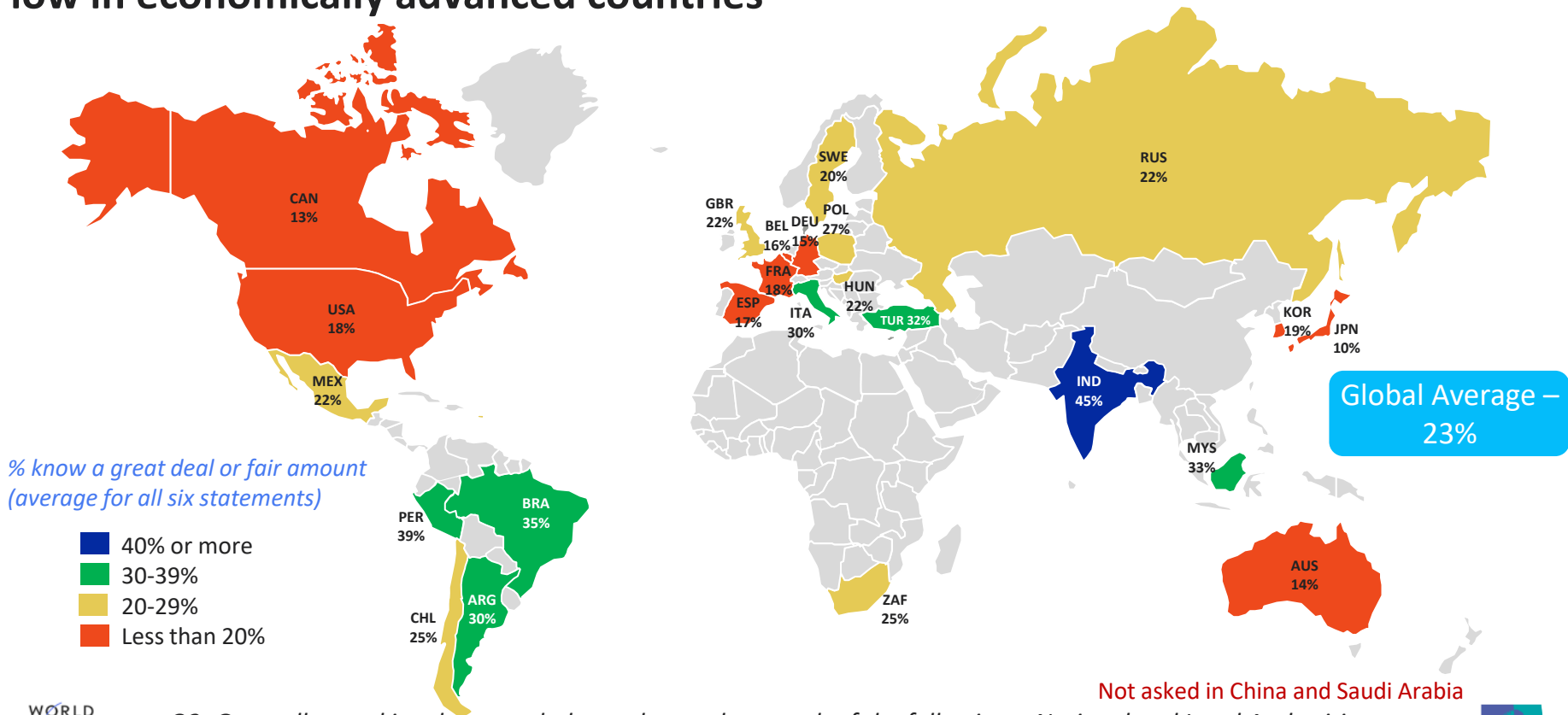
■ A great deal

■ A fair amount

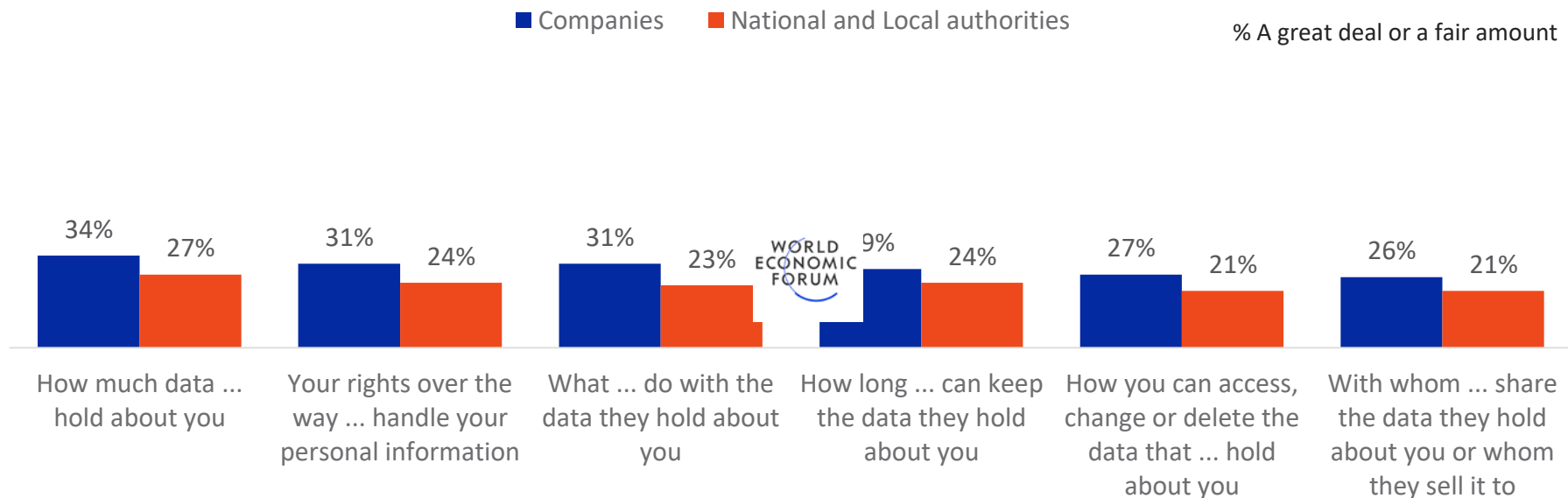
■ A little

■ Nothing at all

Knowledge about authorities' access to and usage of personal data is especially low in economically advanced countries



Citizens know even less how their governments use their personal data than they know how companies use it



**For comparison purposes, global averages for companies on this chart exclude China and Saudi Arabia*

Q1. Generally speaking, how much do you know about each of the following...

Q2. Generally speaking, how much do you know about each of the following...

Base: 17,304 adults aged 16-64 Argentina, Australia, Belgium, Brazil, Canada, Chile, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, South Africa, South Korea, Spain, Sweden, Turkey, United States. October-November 2018

Ipsos-World Economic Forum: Global Citizens & Data Privacy

Most consumers feel they should be able to refuse letting companies use personal data and should be paid or rewarded for it; fewer agree than disagree that companies' usage of personal data makes them save time, makes them save money, or doesn't bother them

Is something consumers should be able to refuse



Is something consumers should be paid or rewarded for



Helps you find/discover products, services and information that are relevant to you



Helps them provide you with products, services and information that better meet your needs



Helps you save time



Helps you save money



Doesn't really bother you



■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree

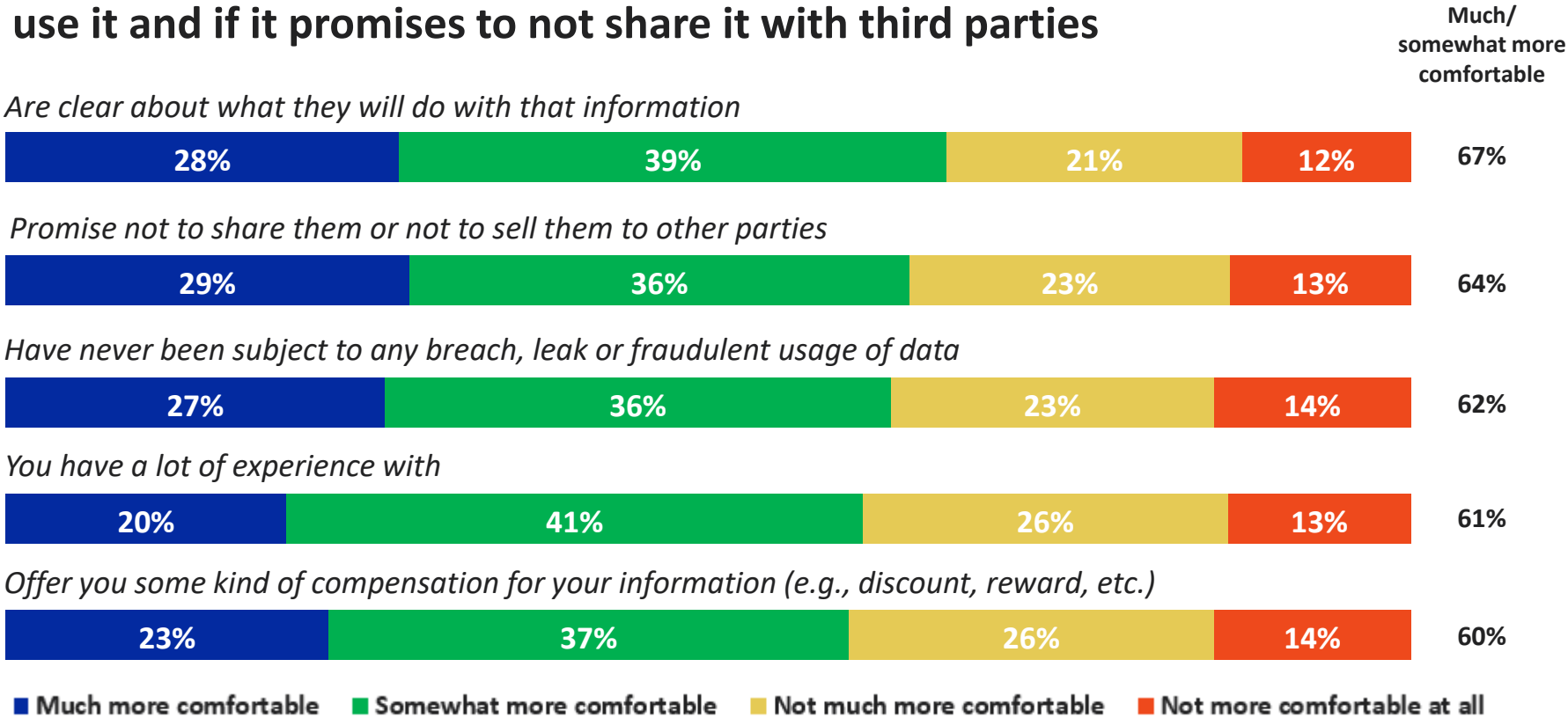
Consumers in emerging countries tend to value benefits from letting companies use personal data about them; continental Europeans tend not to

Q3. To what extent do you agree or disagree that allowing companies to use data they collect about you...

(% Strongly or somewhat agree)

	Total	ARG	AUS	BEL	BRA	CAN	CHL	CHN	FRA	DEU	GBR	HUN	IND	ITA	JPN	MYS	MEX	PER	POL	RUS	SAU	ZAF	KOR	ESP	SWE	TUR	USA
Is something consumers should be able to refuse	62%	53%	72%	68%	60%	79%	62%	57%	71%	56%	75%	54%	56%	66%	51%	49%	52%	50%	63%	52%	54%	72%	63%	67%	75%	60%	75%
Is something consumers should be paid or rewarded for	54%	57%	56%	53%	59%	63%	64%	68%	55%	42%	57%	41%	55%	60%	41%	51%	53%	61%	50%	46%	56%	64%	43%	58%	55%	49%	61%
Helps them provide you with products, services and information that better meet your needs	41%	40%	35%	30%	52%	41%	35%	64%	27%	29%	40%	29%	58%	35%	27%	51%	44%	54%	36%	39%	51%	53%	35%	31%	36%	50%	44%
Helps you find/discover products, services and information that are relevant to you	41%	43%	36%	27%	52%	44%	38%	64%	26%	28%	38%	27%	62%	34%	28%	49%	45%	54%	35%	38%	55%	52%	35%	30%	32%	46%	44%
Helps you save time	35%	36%	31%	24%	47%	35%	30%	63%	24%	27%	36%	18%	55%	26%	22%	52%	38%	49%	29%	33%	48%	42%	35%	23%	26%	41%	34%
Helps you save money	28%	26%	23%	25%	38%	26%	23%	60%	21%	26%	25%	13%	50%	19%	18%	42%	29%	36%	19%	18%	44%	32%	24%	15%	13%	26%	28%
Doesn't really bother you	23%	22%	21%	15%	31%	21%	18%	49%	17%	21%	22%	16%	36%	22%	11%	39%	19%	15%	22%	19%	42%	21%	19%	15%	28%	26%	23%

Comfort sharing personal data is greater if the company is clear about how it will use it and if it promises to not share it with third parties



Companies' usage of personal data: consumers tend to respond favorably to openness and guarantees of confidentiality in all countries and to compensation in most, but not all countries

Q4. To what extent would you be more comfortable about sharing your personal information with companies or brands that...

(% much or somewhat more comfortable)

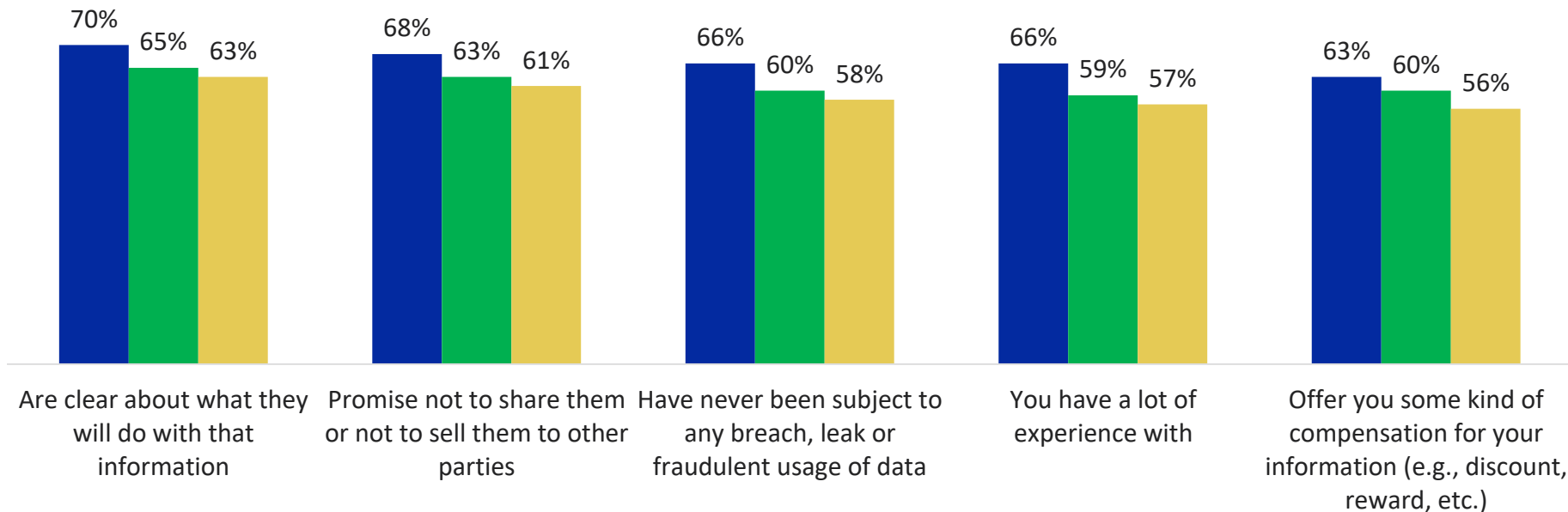
	Total	ARG	AUS	BEL	BRA	CAN	CHL	FRA	DEU	GBR	HUN	IND	ITA	JPN	MYS	MEX	PER	POL	RUS	SAU	ZAF	KOR	ESP	SWE	TUR	USA
Are clear about what they will do with that information	67%	67%	68%	65%	59%	75%	70%	60%	63%	72%	68%	65%	73%	51%	66%	70%	74%	65%	70%	66%	72%	66%	63%	72%	65%	69%
Promise not to share them or not to sell them to other parties	64%	67%	65%	57%	61%	70%	72%	59%	55%	69%	59%	68%	74%	48%	67%	70%	74%	59%	68%	64%	67%	63%	63%	68%	57%	66%
Have never been subject to any breach, leak or fraudulent usage of data	62%	66%	62%	55%	59%	65%	66%	56%	59%	66%	61%	60%	69%	45%	69%	71%	73%	57%	71%	63%	65%	62%	62%	65%	56%	59%
You have a lot of experience with	61%	66%	62%	54%	57%	65%	63%	52%	56%	67%	61%	63%	66%	46%	63%	68%	76%	52%	71%	62%	68%	58%	53%	62%	56%	63%
Offer you some kind of compensation for your information (e.g., discount, reward, etc.)	60%	67%	61%	55%	58%	67%	70%	57%	44%	64%	59%	59%	71%	53%	64%	61%	73%	55%	64%	63%	69%	59%	61%	45%	44%	66%

Younger consumers are slightly more responsive to reassurances about companies' usage of personal data

Q4. To what extent would you be more comfortable about sharing your personal information with companies or brands that...

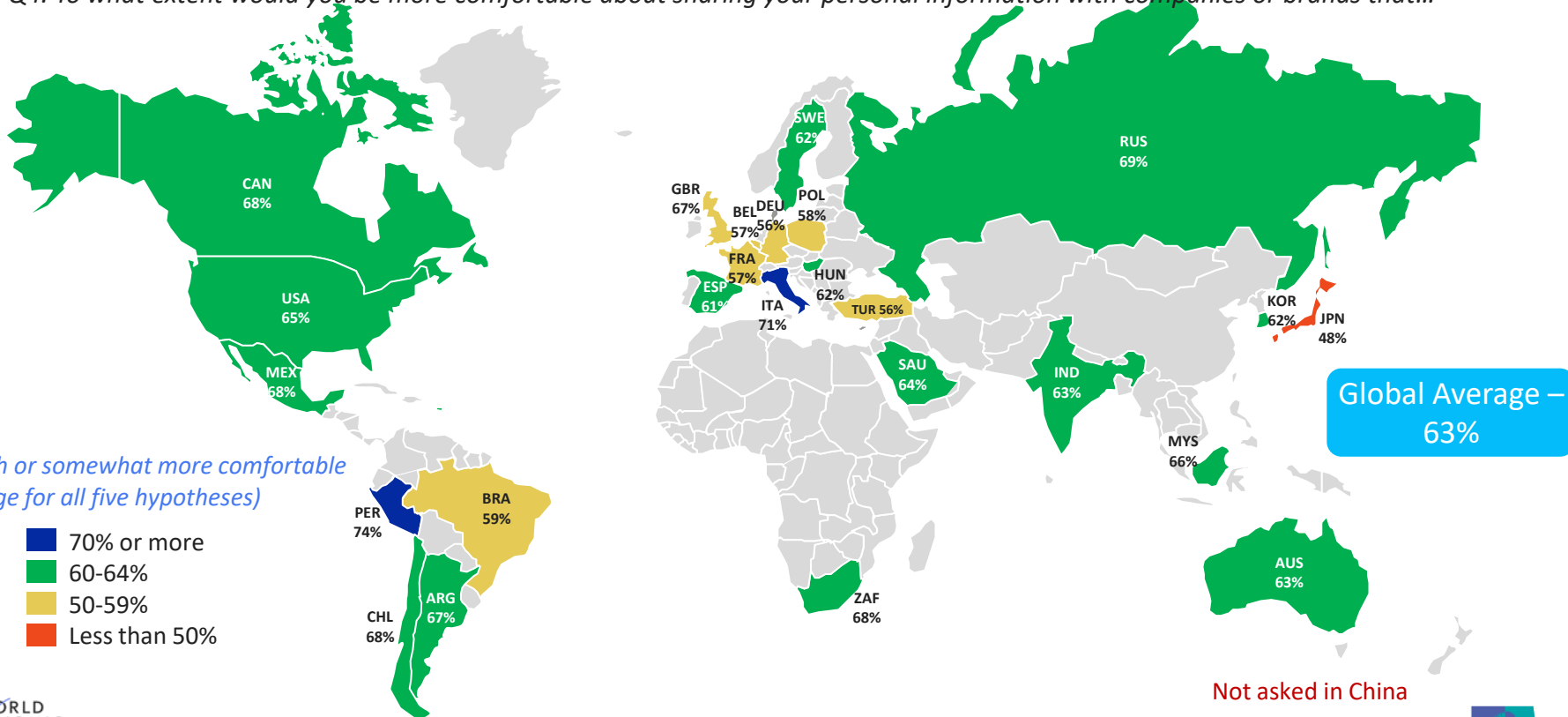
(% much or somewhat more comfortable)

■ Under 35 ■ 35 to 49 ■ 50 to 64



Measures to reassure consumers about sharing personal data with companies are most impactful in Peru and Italy, least so in Japan

Q4. To what extent would you be more comfortable about sharing your personal information with companies or brands that...



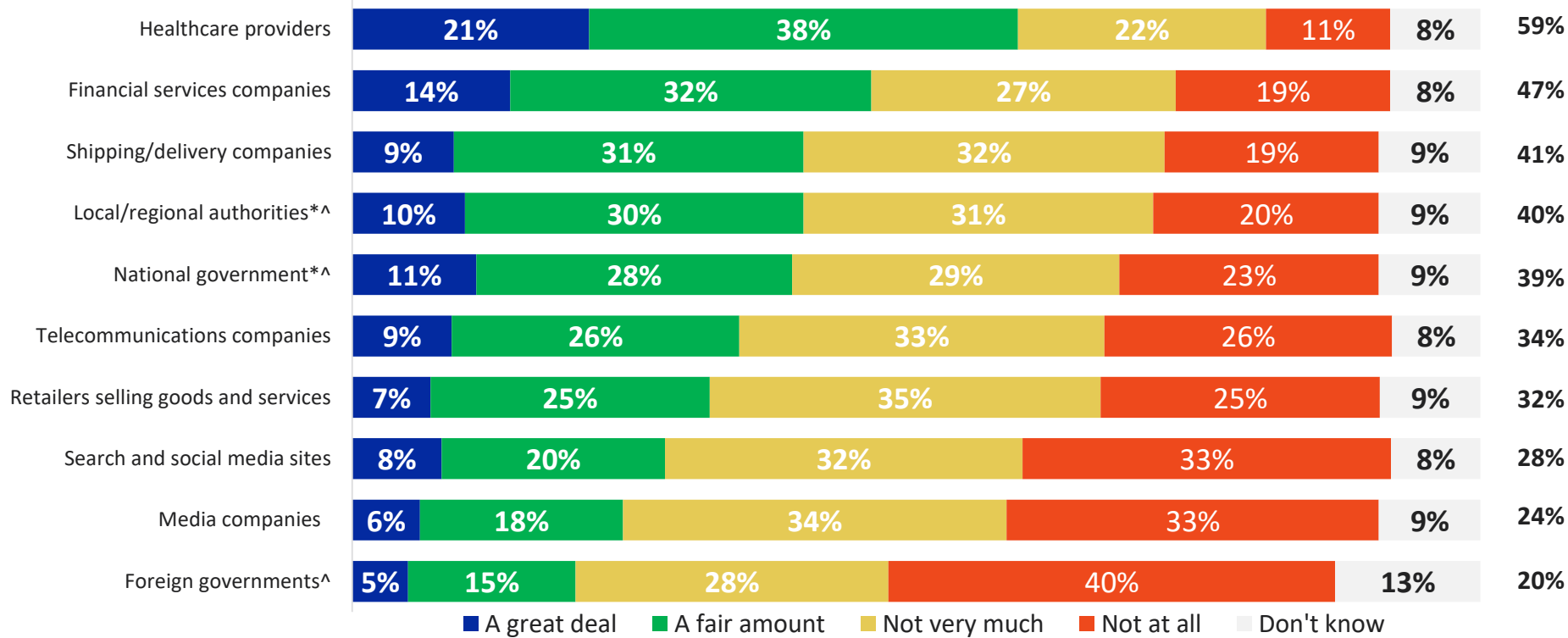
Top reasons for giving an organization access to one's personal data are understanding the risks and having one's needs met by its products and services

Q5. For which of the following reasons would you be most willing to give a company or government organization access to your personal information/data?

	Total	ARG	AUS	BEL	BRA	CAN	CHL	CHN	FRA	DEU	GBR	HUN	IND	ITA	JPN	MYS	MEX	PER	POL	RUS	SAU	ZAF	KOR	ESP	SWE	TUR	USA
If I am informed clearly about the particular risks I'm exposed to	49%	56%	41%	44%	50%	50%	60%	60%	41%	38%	41%	53%	48%	50%	35%	55%	57%	64%	42%	52%	44%	64%	33%	47%	42%	53%	43%
If the services or products exactly match my needs	42%	49%	25%	29%	49%	32%	57%	58%	27%	23%	30%	39%	55%	38%	37%	67%	52%	69%	36%	38%	53%	53%	35%	36%	30%	46%	28%
If it allows particular aspects of my personal situation and needs to be acknowledged and taken into account	30%	48%	25%	24%	29%	26%	47%	33%	18%	19%	29%	34%	34%	21%	16%	37%	35%	44%	20%	37%	25%	41%	35%	26%	29%	35%	22%
If it allows me to access or navigate its website/app faster in the future	21%	20%	17%	12%	21%	17%	18%	47%	11%	13%	16%	14%	27%	17%	18%	33%	24%	28%	22%	18%	29%	21%	26%	16%	20%	17%	17%
If it allows the people I'm dealing to know me better	13%	13%	11%	8%	12%	8%	14%	28%	6%	7%	12%	15%	32%	8%	5%	24%	11%	21%	10%	11%	20%	18%	11%	7%	7%	18%	10%
Don't know	11%	9%	15%	14%	10%	11%	4%	2%	16%	12%	12%	10%	7%	11%	14%	6%	6%	2%	15%	11%	6%	3%	13%	14%	20%	16%	14%
None of these	17%	13%	26%	24%	15%	23%	14%	4%	24%	31%	23%	18%	8%	14%	28%	4%	16%	8%	17%	15%	8%	14%	15%	20%	18%	13%	25%

Trust about organizations' usage of personal data varies widely across sectors; only healthcare providers are trusted by a majority of consumers

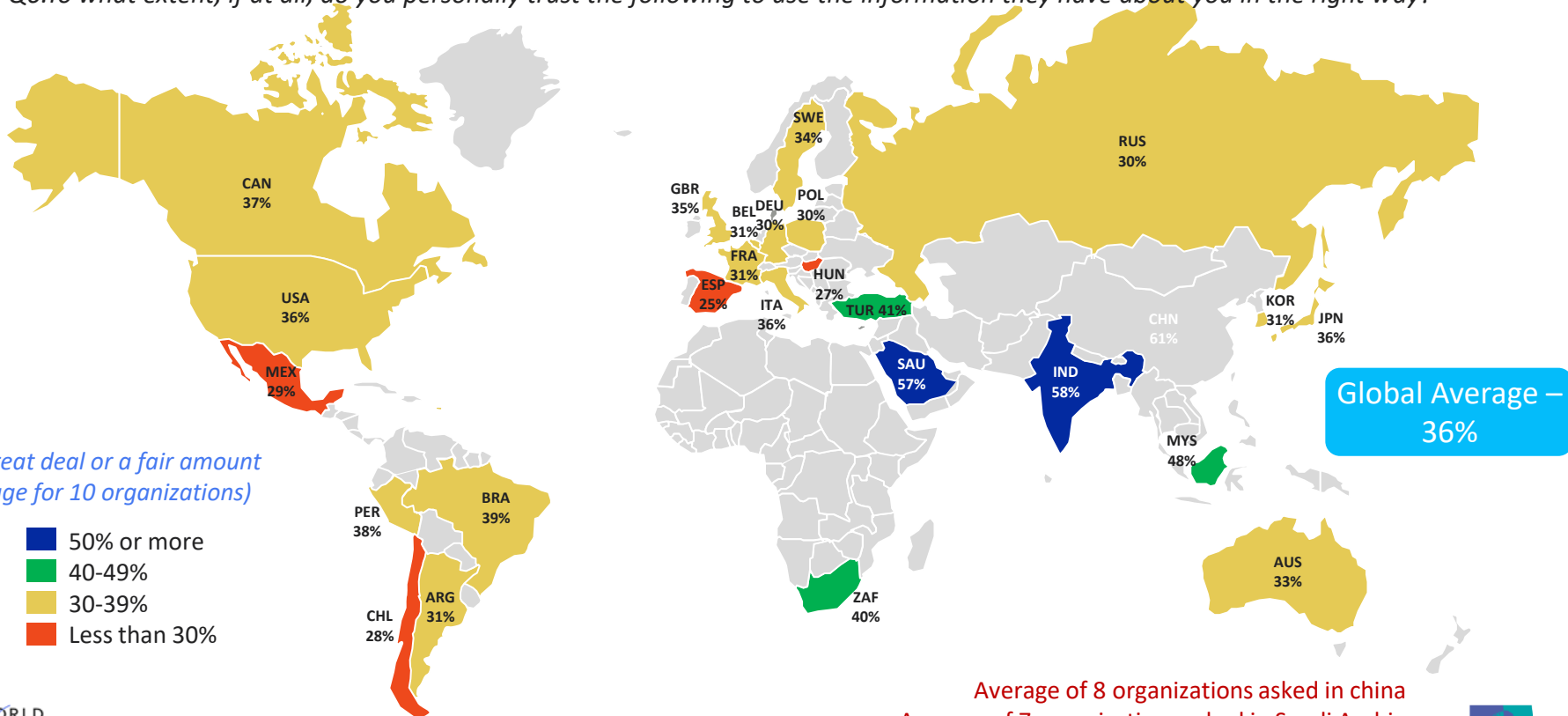
A great deal or fair amount



*not asked in China ^ not asked in Saudi Arabia

Mexico, Chile and Spain are least likely to trust organizations with their personal information

Q6.To what extent, if at all, do you personally trust the following to use the information they have about you in the right way?



Average of 8 organizations asked in china
Average of 7 organizations asked in Saudi Arabia

Trust about companies and governments' usage of personal data also varies widely across countries

Q6. To what extent, if at all, do you personally trust the following to use the information they have about you in the right way?

(% A great deal or a fair amount)

	Total	ARG	AUS	BEL	BRA	CAN	CHL	CHN	FRA	DEU	GBR	HUN	IND	ITA	JPN	MYS	MEX	PER	POL	RUS	SAU	ZAF	KOR	ESP	SWE	TUR	USA
Healthcare providers	59%	49%	64%	64%	52%	74%	45%	74%	67%	56%	66%	45%	67%	56%	57%	57%	53%	59%	45%	53%	69%	72%	46%	51%	69%	70%	60%
Financial services companies	47%	33%	40%	37%	44%	57%	31%	69%	33%	38%	47%	38%	67%	35%	53%	60%	38%	50%	40%	43%	68%	62%	40%	24%	52%	58%	52%
Shipping/delivery companies	41%	43%	39%	34%	38%	45%	36%	61%	34%	34%	34%	31%	61%	44%	41%	46%	41%	44%	32%	32%	60%	51%	34%	33%	23%	38%	47%
Local/regional authorities*^	40%	29%	43%	42%	40%	49%	31%	-	43%	45%	45%	34%	61%	46%	42%	50%	22%	37%	30%	32%	-	36%	34%	29%	51%	44%	40%
National government*^	39%	31%	41%	42%	41%	47%	36%	-	39%	37%	43%	25%	69%	38%	37%	52%	23%	37%	33%	36%	-	31%	41%	26%	48%	51%	34%
Telecommunications companies	34%	29%	28%	23%	36%	28%	19%	67%	28%	27%	28%	27%	56%	30%	35%	50%	30%	37%	31%	33%	58%	41%	28%	19%	28%	40%	31%
Retailers selling goods and services	32%	29%	29%	29%	39%	28%	21%	59%	25%	26%	33%	18%	55%	32%	37%	42%	21%	28%	25%	20%	49%	39%	20%	21%	29%	32%	36%
Search and social media sites	28%	33%	19%	16%	41%	17%	22%	60%	17%	15%	20%	14%	53%	28%	25%	51%	23%	32%	28%	21%	48%	27%	22%	17%	15%	30%	23%
Media companies	24%	21%	15%	15%	33%	16%	20%	53%	16%	17%	18%	12%	46%	26%	21%	40%	19%	26%	22%	18%	46%	24%	21%	16%	16%	25%	23%
Foreign governments^	20%	17%	16%	11%	28%	10%	16%	44%	13%	12%	17%	19%	48%	23%	13%	28%	19%	27%	19%	14%	-	23%	21%	13%	12%	22%	16%

*not asked in China ^ not asked in Saudi Arabia

Methodology

- These are the findings of an Ipsos Global Advisor survey on attitudes toward data privacy in partnership with the World Economic Forum. In total, 18,813 interviews were conducted October 26 – November 9, 2018 among adults aged 18-64 in the US and Canada, and adults aged 16-64 in all other countries.
- The survey was conducted in 26 countries around the world via the Ipsos Online Panel system. The countries reporting herein are Argentina, Australia, Belgium, Brazil, Canada, Chile, China, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Saudi Arabia, South Africa, South Korea, Russia, Spain, Sweden, Turkey and the United States of America. Note that some of the questions were not asked in all 26 countries.
- Between 500 and 1000+ individuals participated on a country by country basis via the Ipsos Online Panel. The sample size is 1000+ in Australia, Brazil, Canada, France, Germany, Great Britain, Italy, Japan, Spain and the United States of America. In all other countries the sample size is 500+. The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 5.0 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website.
- In countries where internet penetration is approximately 60% or higher the data output generally reflects the overall population. Of the 26 countries surveyed online, 16 yield results that are balanced to reflect the general population: Argentina, Australia, Belgium, Canada, France, Germany, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden, Great Britain and the United States. The 9 remaining countries surveyed – Brazil, Chile, China, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa and Turkey - have lower levels of internet connectivity and reflect online populations that tend to be more urban and have higher education/income than the general population.
- Where results do not sum to 100, this may be due to computer rounding, multiple responses or the exclusion of don't knows or not stated responses.
- Data are weighted to match the profile of the population.

ABOUT IPSOS

Ipsos ranks third in the global research industry. With a strong presence in 87 countries, Ipsos employs more than 16,000 people and has the ability to conduct research programs in more than 100 countries. Founded in France in 1975, Ipsos is controlled and managed by research professionals. They have built a solid Group around a multi-specialist positioning – Media and advertising research; Marketing research; Client and employee relationship management; Opinion & social research; Mobile, Online, Offline data collection and delivery.

Ipsos is listed on Eurolist – NYSE – Euronext. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP

www.ipsos.com

GAME CHANGERS

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

We believe that our work is important. Security, simplicity, speed and substance applies to everything we do.

Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

“GAME CHANGERS” – our tagline – summarises our ambition.