

Global data privacy: What the consumer really thinks

2018

Responsible Marketing

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/ Introduction

Welcome to the first 'Global data privacy: What the consumer really thinks' report, which takes a theme we've been investigating regularly in the UK for the past five years and, for the first time, expands to take in the views of people across 10 markets and 4 continents globally. The findings offer insight into the similarity of consumer views around their data, but with some interesting differences that this report goes on to discuss. We'd like to thank Acxiom for partnering with us on bringing this valuable insight to our growing global community.

This research is released amidst a significant increase in discussion about data, following recent news headlines and the introduction of the General Data Protection Regulation (GDPR) in Europe. These new laws seek to balance the customer's right to privacy with the legitimate interests of companies wanting to serve them. This may go some way to rectifying the current perception three-quarters of consumers have that businesses benefit most from the sharing of personal data.

We are in a new era of data privacy. Questions have been raised about whether major data breaches and increased discussion surrounding our personal data is impacting consumer anxiety over how their information is used and managed. In fact, our research shows that consumer attitudes are changing in a positive way that makes us optimistic. The majority of people (51%) we surveyed across the globe are 'Data pragmatists' who will decide whether to share their personal information on a case-by-case basis, dependent on the benefits.

Meanwhile, one in four consumers (26%) have little concern about how their data is collected and used, which the study describes as the 'Data unconcerned'. Even fewer (23%) are unwilling to provide their personal information, even in return for service enhancement ('Data fundamentalists'). Despite some changes across the 10 countries involved in the study, the overall trend towards a pragmatic approach to data is resounding.

Despite the clear cultural difference and maturity of the respective data economies around the world, consumers increasingly understand the part data has to play.

Across all countries control, trust and transparency form the foundational basis for healthy data economy. For instance, 88% of consumers cite transparency as the key to trusting organisations. Improving transparency and control for people will help companies be in a much stronger position to engage them within the data economy.

This strikes at one of the core principles of Europe's GDPR: 'accountability'. This requires companies to consider the impact on privacy and the risks posed to their customers before doing anything with their data and strives to achieve a balance between privacy and innovation.

If your product or service creates real benefits for people by using their data, then you should be happy to say so – openly and proudly. Consumers will reward you with their trust and their custom.

Chris Combemale,
GDMA Board member & CEO of the DMA (UK) Group

/ Foreword

Globalisation. A term that's no longer new and something we live with every day.

The majority of us have gotten used to global products, global fashions, global working and global entertainment. From smartphones to cars, from sportswear to hairstyles, from email to videoconferencing and from social media to subscription TV, we are all, undeniably, more global in our lives.

Whether we're talking of the physical world of homes, offices and shops or the digital world, whether the data connection is direct or indirect, data is almost always, almost everywhere, in almost all that we do.

Never before has it been so important to understand how consumers think of data and data privacy. That's true both within countries and between countries and it's true not just for global brands, but for smaller ones and start-ups. After all, most of the world's biggest digital brands were start-ups just a decade or so ago and are now serving the world's consumers.

This report helps us all orientate around people, the consumer. It helps us respect local differences where they exist, but perhaps more so, as this report shows, it helps us recognise the relative consistency of attitudes towards data privacy globally.

At these times of changing data legislation, to see how so many consumers really feel about data in this world we live in together, gives us the best possible chance to get it right, together.

Sheila Colclasure,
Global Chief Data Ethics Officer at Acxiom

/ Executive summary

The majority of global consumers are Data Pragmatists

Over half (51%) of consumers across 10 global markets are Data Pragmatists; people who are happy to exchange data with businesses so long as there is a clear benefit for doing so. Just over a quarter (26%) of global consumers are Data Unconcerned; people who show little or no concern about the use or collection of their personal data. Less than 1 in 4 (23%) fall into the Data Fundamentalist segment; people who are unwilling to share personal information under any circumstances. Consequently, it is now the vast majority of global consumers (77%) who show no fundamental objection to engaging in the data economy, demonstrating fertile ground for the future.

Global privacy concerns are high, but there is general happiness with the amount of data shared

A majority of global consumers indicate a relatively high level of concern with the issue of online privacy, with an average of 74% across the 10 markets stating a degree of concern. Despite this, the majority of consumers across all markets claim that they are happy with the amount of personal information they currently exchange; with agreement reaching 62% in Singapore.

High awareness and understanding of the role of data exchange across global societies

A significant proportion of global consumers believe that sharing personal data is part of the modern economy, with such opinions being the most pronounced in Germany, the UK and the USA where two-thirds agree. However, the value of data exchange to the running of society more broadly is less acknowledged; only in Singapore do a majority (55%) of consumers hold this view.

Global consumers assume most responsibility for their own data security

Across global markets, consumers display high levels of personal responsibility when it comes to their own data security. On average, 38% of global consumers believe they should have ultimate responsibility for their data security. Conversely, 15% claim ultimate responsibility should lie with government institutions and just 5% state it should lie with businesses/organisations.

Industry is seen to disproportionately benefit from the data economy across global markets

At present, there is a global imbalance in who is perceived to benefit from the current data economy. On average across global markets, 78% of consumers believe that industry benefits most from data sharing and just 9% believe that consumers currently benefit the most. However, younger consumers are more likely to believe that they currently benefit most from the data they exchange with industry; for example, 23% of 25-34 year olds in Australia already hold this view. Despite this, the extent of the perceived imbalance will need to be addressed in order to capitalise on the wider positive trends highlighted in this report and to build a data economy that is seen to benefit all parties more equally.

Establishing trust is paramount to developing a sustainable global data economy

The primary factor that encourages consumers to exchange personal data with industry is the overall level of trust in the specific business or organisation. Half (51%) of consumers across global markets put trust in an organisation in their top three factors that make them happy to share personal information with a company. This compares to just 36% of global consumers who selected the second highest ranking factor; receiving free services or products in exchange for personal information.

Control is a core and consistent consumer aspiration

A consistent aspiration across the global consumer landscape is for more control over the use and flow of personal data. Indeed, 83% of global consumers claim that they would like more control over the personal information they give to companies and the way in which it is stored. This rises to 89% in Spain and falls to 78% in the Netherlands. Providing consumers with an enhanced sense of control will be a key foundation for a healthy data economy.

Transparency is entrenched as a global priority for data exchange

The vast majority of consumers across all markets claim that increased transparency over how their data is used and collected is critical when sharing personal information with businesses. Indeed, 86% of consumers globally state that transparency over how their data is used and collected is important when exchanging data with a company.

Global consumers showcase a strong entrepreneurial spirit towards the data economy

The global customer base is primed to engage with the data economy. An average of 73% across global markets view their data as something that can be exchanged for better services and offers from brands. Such attitudes drive a transactional relationship with the data economy; providing fertile ground for a mutually beneficial and healthy data economy across the globe.

Broad interest in a range of incentives for data exchange, beyond just monetary reward

Once the foundations of trust, control and transparency are in place, there is a range of strategies that brands can utilise to engage consumers within the data economy. Indeed, significant minorities across global markets are interested in a wide range of incentives that can be offered in exchange for their personal information. For example, almost half (47%) of global consumers state they would be likely to share their personal data in exchange for free products/services, while a third (31%) would do so in exchange for personalised products and services.

/ Part 1: The Changing Global Consumer Landscape

The findings presented here demonstrate a mature and empowered global consumer mindset towards online privacy and data exchange. Moreover, there is high public awareness and acceptance of the role data exchange has in the modern digital economy; albeit with clear differences across the various markets.

A pragmatic view towards data exchange across global markets

In 2012 and 2015, the UK DMA and Foresight Factory constructed a segmentation analysis that categorised consumers according to their attitudes towards privacy and data exchange in the UK. The key segments adopted were:

- **Data Pragmatists:** those who will make trade-offs on a case-by-case basis as to whether the service or enhancement of service offered is worth the information requested
- **Data Fundamentalists:** those who are unwilling to provide personal information even in return for service enhancement
- **Data Unconcerned:** those who are unconcerned about the collection and use of personal information about them

For the purposes of this work, we have recreated the above segmentation across 10 global markets and found that:

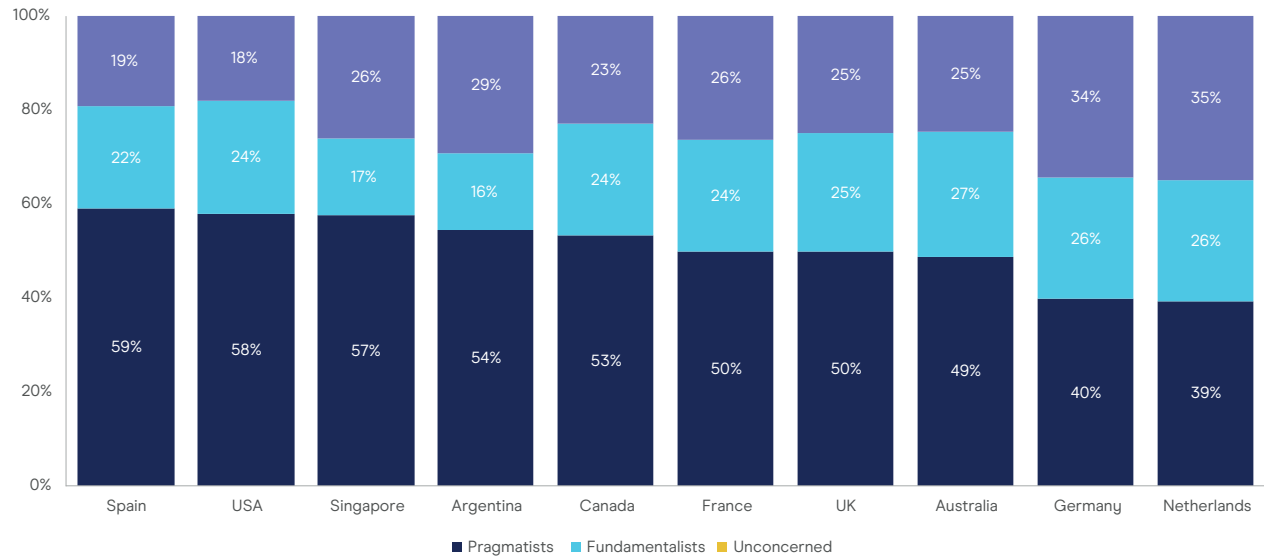
- 51% of the population across the global markets are Data Pragmatists
- 23% of the population across the global markets are Data Fundamentalists
- 26% of the population across the global markets are Data Unconcerned

Such findings show that the vast majority of global consumers have no fundamental objection to the sharing of personal data. Indeed, over half are prepared to engage in data exchange so long as there is a clear benefit for doing so, while a further quarter show little concern with sharing personal information altogether. Just 23% of global consumers show an unwillingness to engage with the data economy.

However, the proportion of Data Pragmatists does vary across global markets. For instance, while the pragmatist mindset is particularly pronounced in markets such as the USA and Spain, reaching almost 60% of consumers, this falls to just 40% in Germany and the Netherlands.

Interestingly, in markets where the number of Data Pragmatists is notably lower, there is a corresponding increase in the proportion of Data Unconcerned. For example, in Germany and the Netherlands, where there is a relatively smaller Data Pragmatist population, over a third of consumers are Data Unconcerned.

A segmentation of attitudes towards privacy across global markets



Across global markets, there is a clear trend in terms of the consumer groups that are most likely to fall within the three segments. For example, younger consumers globally are far more aligned to the unconcerned mindset compared to older age groups. This is most apparent in Germany where 58% of 18-24 year olds are Data Unconcerned. But this trend is apparent across all markets. For instance, 43% of 18-24 year olds in Argentina are Data Unconcerned, compared to 20% of those aged 65 and over.

At the same time, older consumers are much more likely to be Data Fundamentalists. In Australia, for example, 38% of consumers aged 65+ are Data Fundamentalists compared to 15% of consumers aged 18-24. To highlight this trend even further, in the USA 38% of older consumers are Data Fundamentalists compared to just 12% of 18-24 year old consumers.

While age clearly has an impact on the likelihood that consumers are either Data Fundamentalists or Data Unconcerned, this is not the case for the Data Pragmatists. Indeed, the Data Pragmatists are broadly age agnostic, with a relatively consistent number of consumers falling within this segment across age groups.

Concerns over online privacy remain, but general happiness with the levels of data sharing

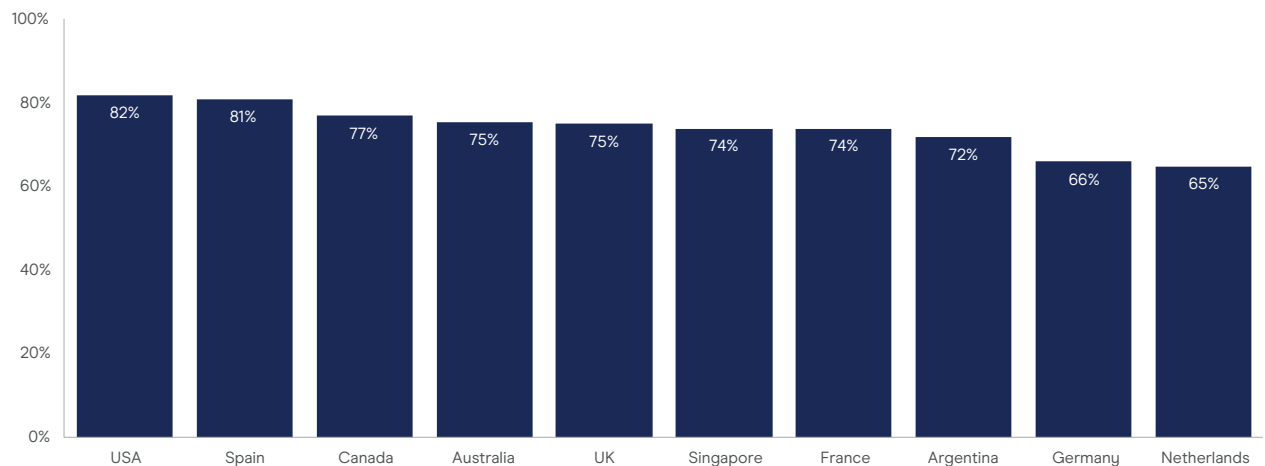
A majority of consumers across all global markets show a relatively high level of concern about the issue of online privacy. Levels of concern vary across markets, with the highest level of public concern evident in the USA and Spain where 81% indicate to have some level of concern with their online privacy. Conversely, the number of consumers showing concern with online privacy drops to two-thirds in Germany and the Netherlands.

However, it should be noted that high levels of concern around online privacy are not a direct indicator of negativity towards the data economy. Indeed, the proportion of Data Fundamentalists is actually higher in those markets that show low levels of overall privacy concern.

Moreover, the markets that display the most levels of concern are those that are dominated by the pragmatist mindset, suggesting that higher levels of concern are due to a more guarded and transactional attitude towards the data economy; rather than a sense of negativity or disengagement.

“On a scale from 1 to 10 where 1 is ‘not at all concerned’ and 10 is ‘very concerned’, how do you rate your levels of concern about the issue of online privacy these days?”

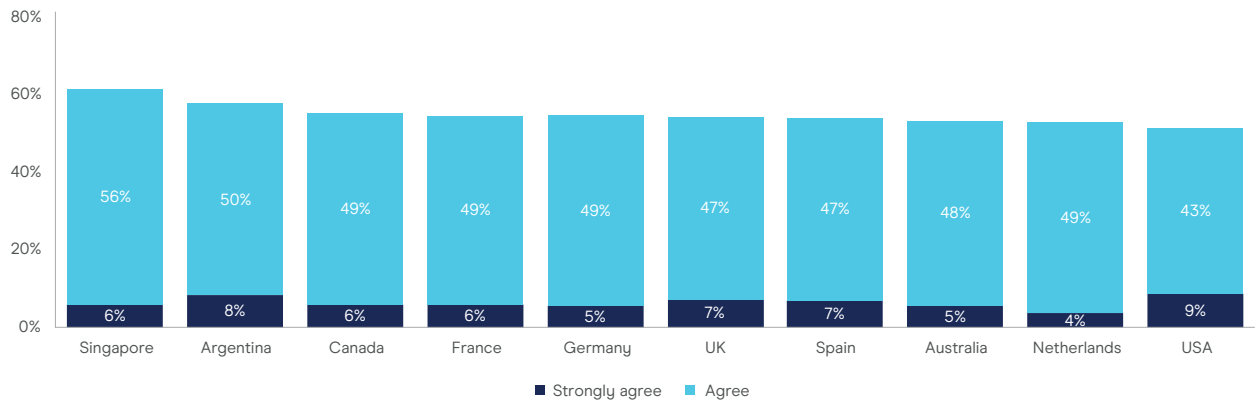
% who answer 7-10



A majority of consumers in all global markets are happy with the amount of data they exchange with organisations these days. Agreement with this statement reaches 62% in Singapore and 58% in Argentina, falling to 53% and 52% in the Netherlands and the USA respectively.

“On the whole I am happy with the amount of personal information I give to organisations these days”

% who strongly agree or agree

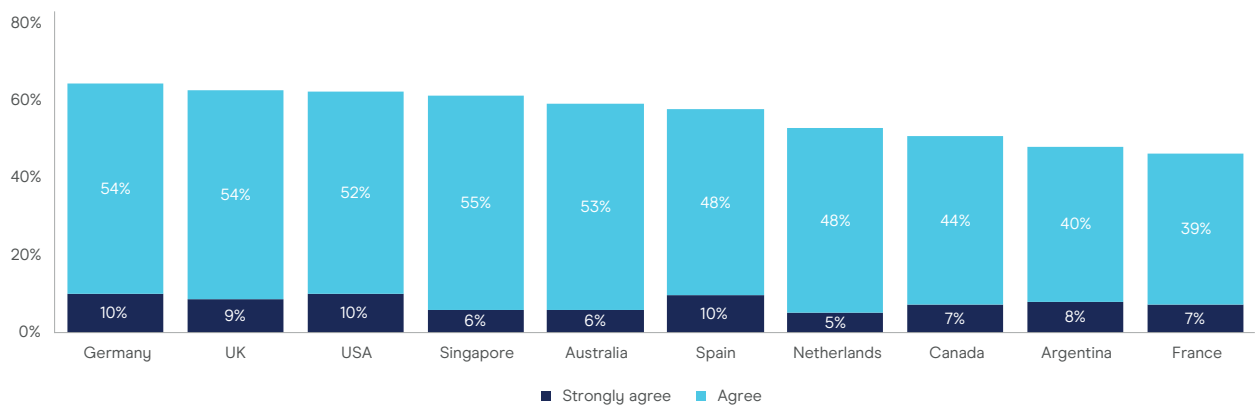


High awareness and acceptance of data exchange across global markets

A significant proportion of consumers across global markets believe that sharing personal data is part of the modern economy. Such sentiments are particularly pronounced in Germany, the UK and the USA where around two-thirds agree. However, agreement falls to less than half of consumers in Argentina and France; 48% and 46% respectively.

“Sharing data and personal information online is part of the modern economy”

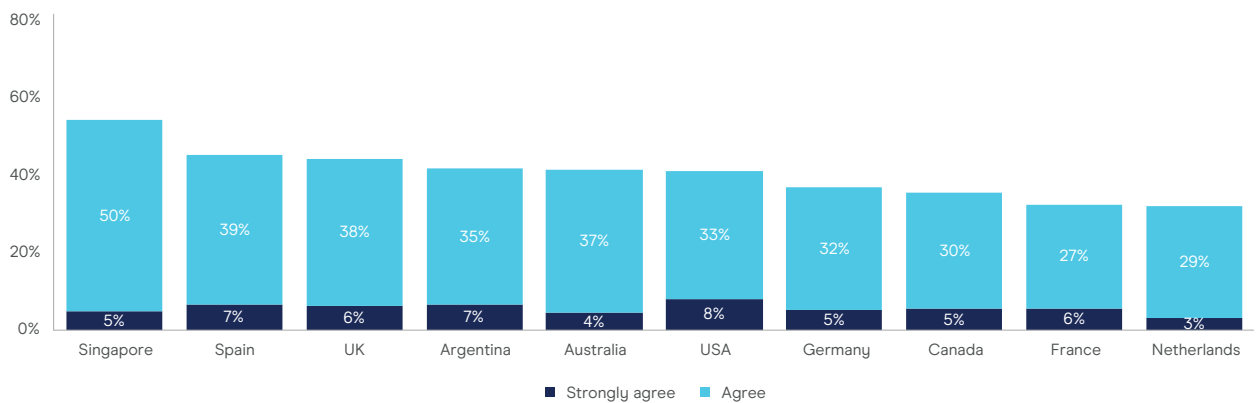
% who strongly agree or agree



The value of data exchange to the smooth running of society is less acknowledged by global consumers; only in Singapore do a majority of consumers agree with this statement. Such evidence suggests that the economic benefits of data exchange are evident across the global consumer landscape, but the wider ancillary benefits accredited to modern information sharing are less understood and valued.

“The exchange of personal information is essential for the smooth running of modern society”

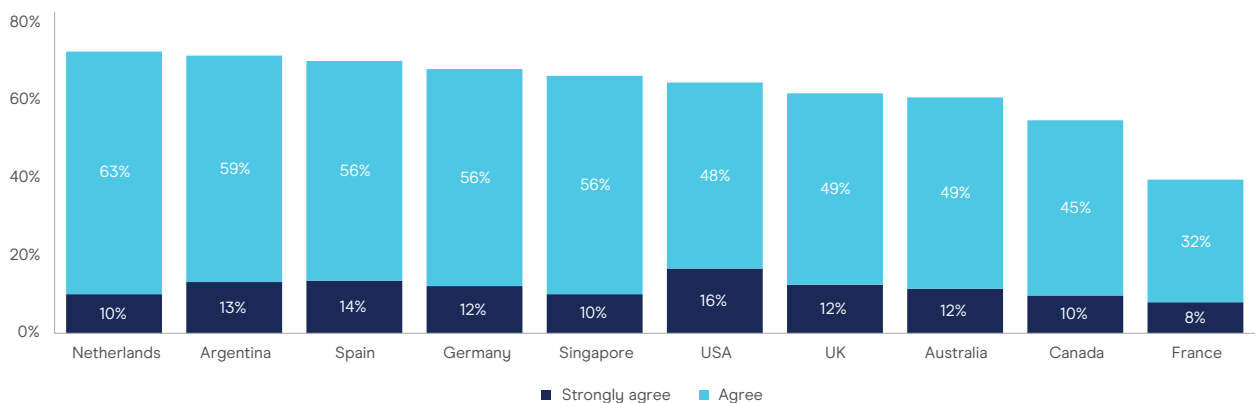
% who strongly agree or agree



Across global markets, there is high awareness of the collection and use of personal information. A majority in almost all markets claim to feel more aware of how their data is used and collected, with agreement reaching almost three-quarters in the Netherlands, Argentina and Spain. The notable exception is France, where just 40% of consumers claim to be more aware.

“I feel more aware of how my data is used and collected than in the past”

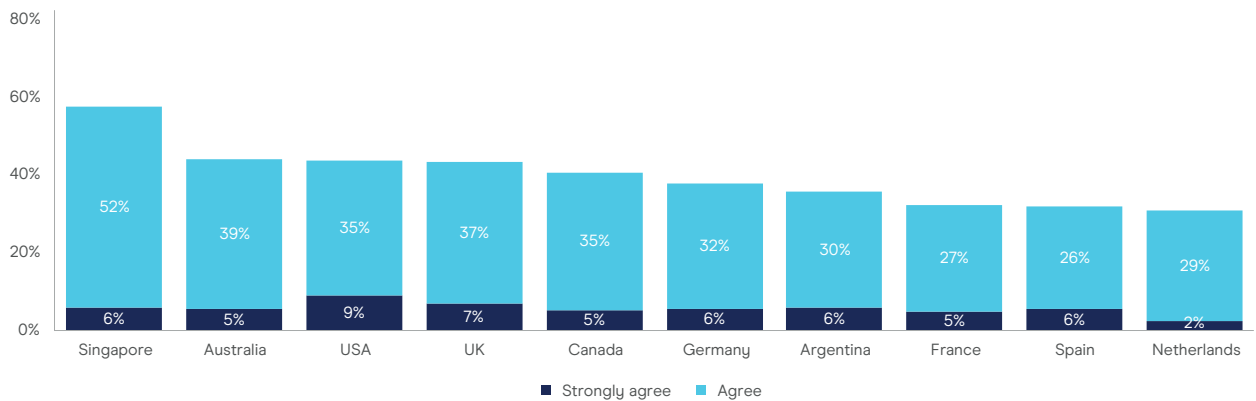
% who strongly agree or agree



Interestingly, while global consumers demonstrate high levels of awareness around data exchange and happiness with the current amount of information shared, this has not led to a significant number of global consumers feeling more comfortable with the idea of sharing personal data with companies. Only in Singapore do a majority of consumers claim to be more comfortable with the idea of exchanging personal data. However, agreement does rise considerably among younger consumers across some markets. For example, over half of 18-24 year olds in Australia agree with this statement.

“I feel more comfortable with the idea of exchanging some personal data with companies than I did previously”

% who strongly agree or agree



Overall, there is clear evidence of a maturing global data economy, with significant consumer awareness and acceptance of the use and role of data exchange in modern economies.

However, the low level of comfort demonstrated with exchanging personal data with industry is an indicator that becoming more aware and accepting of the data economy does not necessarily lead to proactive and positive engagement.

Indeed, a challenge for the global industry will be how to capitalise on the positive consumer attitudes highlighted in this report and ensure that customer engagement with the data economy does not end with a sense of reluctant acceptance.

The steps that can be taken to promote a culture of data exchange that fosters more positive engagement, over reluctant acceptance, will be explored below.

/ Part 2: Promoting a Healthy Global Data Economy

Globally, there are a number of challenges emerging for the future data exchange landscape. There is evidence of a strain on the current value exchange model, while high levels of interest in and use of ad blocking technology will enable consumers to directly opt-out of aspects of the data economy.

At the same time, while we find a strong awareness of the intrinsic value of personal data, there is currently a clear perceived imbalance in terms of who currently benefits the most from the data economy.

Despite such challenges, the evidence presented here highlights how building a foundation for the data economy built on control, trust and transparency can nurture the evolution of a healthy global data environment.

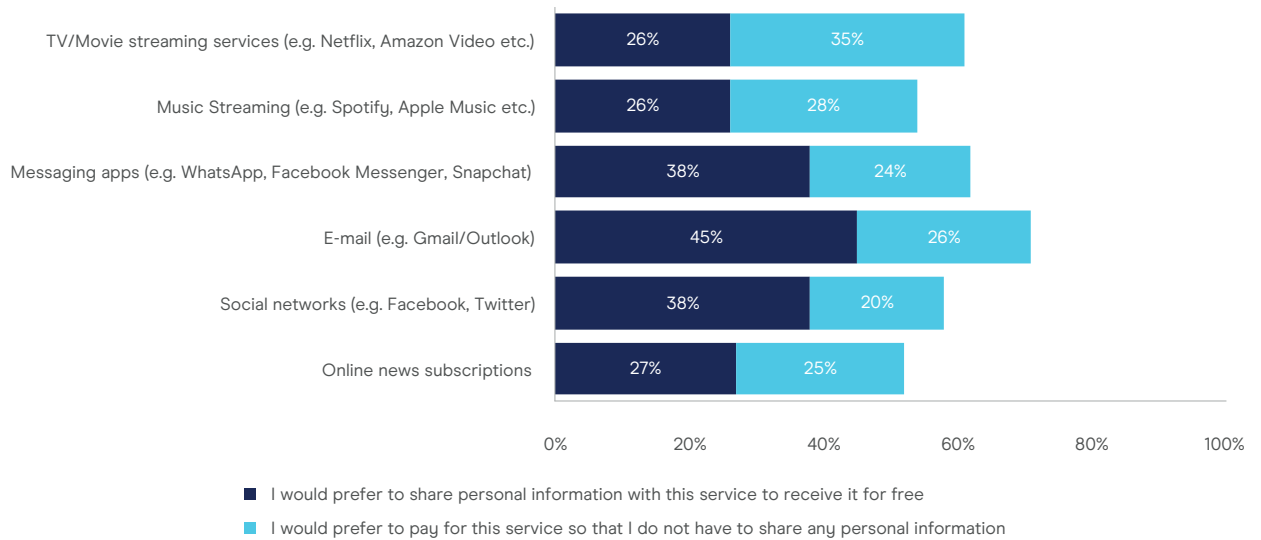
Moreover, with such foundations in place, there is a wide range of incentives that industry can utilise to engage consumers and build a future data economy that is to the benefit of all.

Challenges for the current data economy

The importance of promoting the benefits that global consumers receive from data exchange becomes evident when we consider the proportion of people globally who are prepared to pay for certain online services rather than share their personal information.

As demonstrated in the chart below, more consumers globally are prepared to pay for TV/movie and music streaming services rather than exchange personal data in order to receive these services for free. In addition, almost equal numbers are prepared to pay for online news services as they are to exchange personal data. This may be attributed to the fact that these categories already provide (optional) paid subscription models to their users and that consumer responses are in effect tied to the status quo. Indeed, online services that are usually provided for free, such as e-mail and social networks, receive relatively lower preference for direct payment options.

“For each of the following services, please state whether you would prefer to pay for the service or share personal information in exchange for free access to the service” Global Average

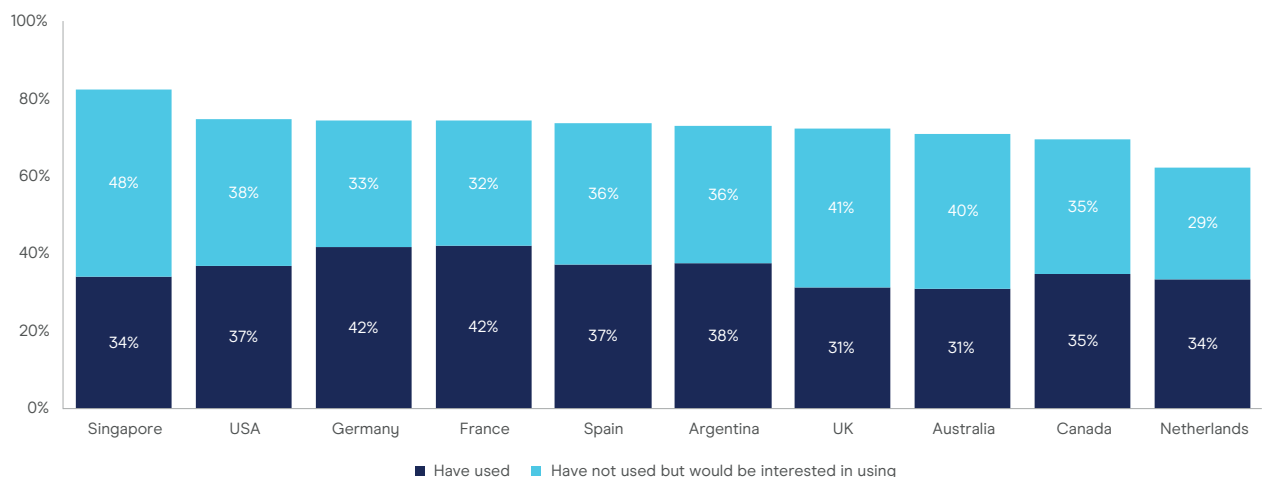


Nevertheless, the significant minorities of consumers globally who would prefer to pay for services rather than exchange personal data, highlights the importance of communicating, reinforcing and improving the value exchange model on offer to consumers across the global data economy.

Significant level of interest in ad blocking

A further challenge to the existing global data economy is the high level of interest in ad blocking technology across all global markets. Strong majorities in all markets have either used or would be interested in using ad blocking technology, reaching 82% in Singapore.

“Have you or would you be interested in using ad blocking software (e.g. a programme/software that removes advertising you would normally see when browsing online)?”



The use of such technology will enable consumers, in some instances, with the ability to put any unrest with the current value exchange model into more meaningful action; essentially opting out of the model altogether.

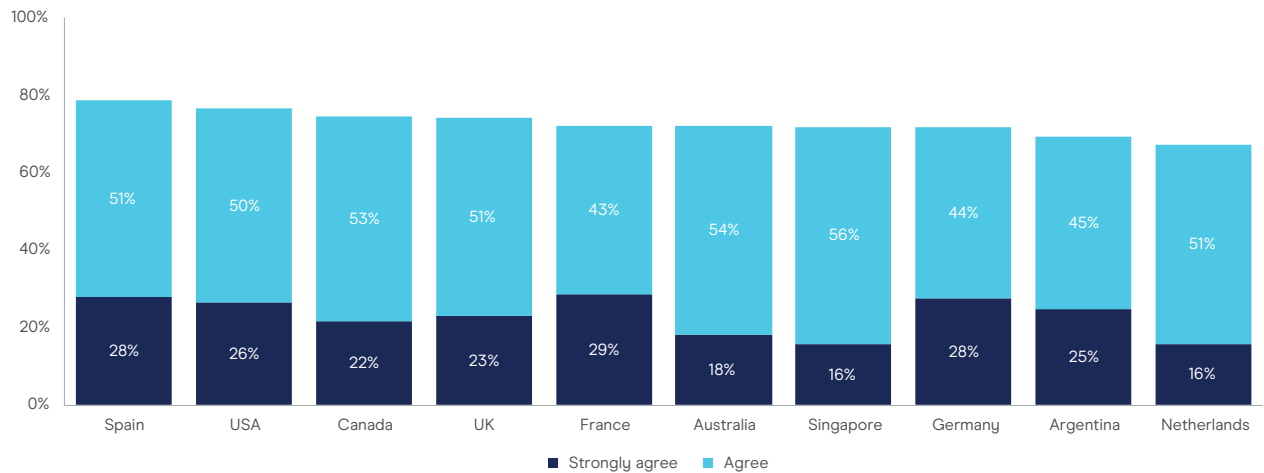
Below we outline how the value exchange between consumer and industry globally can be maintained and strengthened.

Engaging the Consumer Capitalist

Despite the challenges outlined above, we find a global consumer base that is primed to engage with the data economy. The vast majority of consumers in all markets view their data as personal property that can be used to trade with brands for better services and offers. Indeed, an average of 73% of global consumers view their data in this way, rising to 79% in Spain and dropping to a low of 67% in the Netherlands.

My data is my property and I should be able to trade it if I like (e.g. for better offers, services)

% who agree strongly or agree

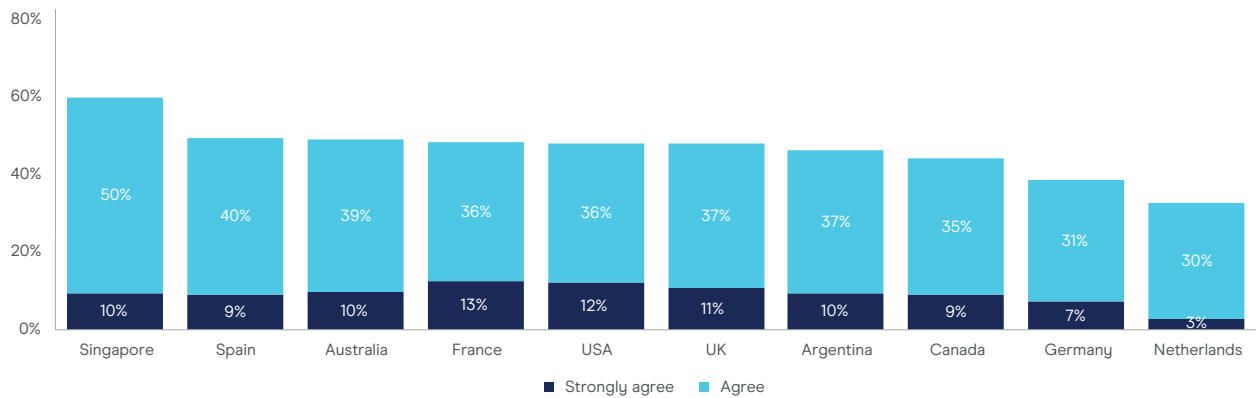


Viewing data as a commodity that can be utilised for personal gain drives a transactional engagement with the information economy, which will be critical in reinforcing the value exchange between industry and consumer.

However, the extent to which consumers believe they can action the value of their data varies across markets. For example, while around half of consumers in markets such as France, the USA and the UK see their data as an asset that can be used to negotiate better prices and offers, this falls to just a third in the Netherlands.

“I see my personal information as an asset that I can use to negotiate better prices and offers with companies”

% who agree strongly or agree

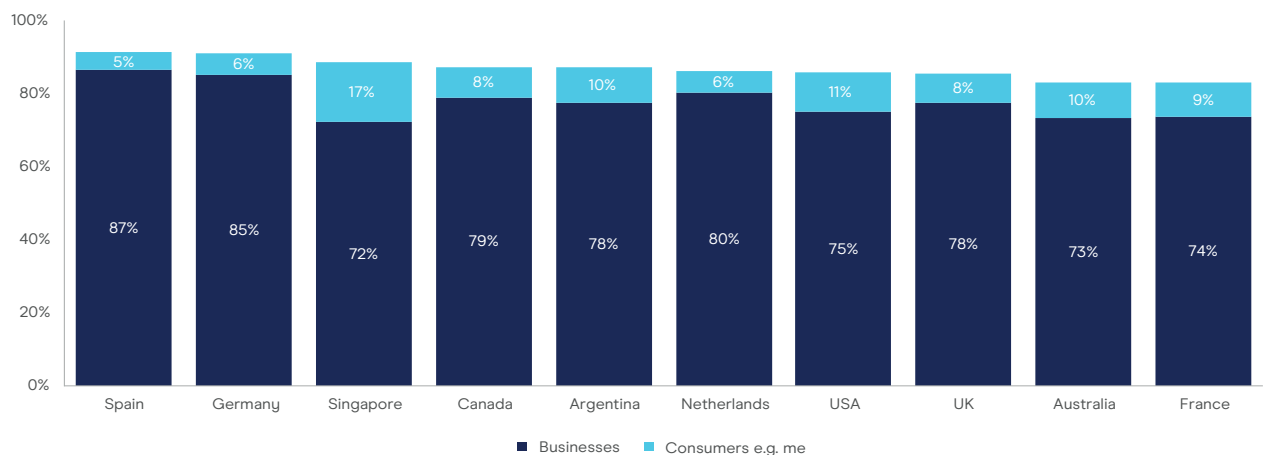


Addressing the perceived asymmetry between industry and consumer

While global consumers show an entrepreneurial mindset to the potential benefits on offer from their engagement with the data economy, the vast majority of global consumers believe that businesses benefit disproportionately from data sharing. On average across all global markets, 78% of consumers claim that businesses currently benefit most from the data economy; compared to just 9% who claim that the consumer does.

This perceived imbalance is particularly prominent in Spain and Germany with 87% and 85% respectively believing that industry are the primary beneficiaries. Consumers in Singapore show the lowest perceived imbalance, with 17% already believing they currently benefit most.

“In your opinion, who currently benefits the most from personal data exchange?”



A more positive trend emerges among younger consumers. For example, the number of 18-24 year olds in the USA and Canada who claim that consumers benefit most from the data economy is 18% and 17% respectively. Moreover, in Australia, 23% of 25-34 year olds also hold this view.

Despite such trends among younger customer groups, the continued imbalance in the data economy perceived by consumers will need to be addressed in order to promote a sustainable and healthy global data landscape.

Foundations for a healthy value exchange

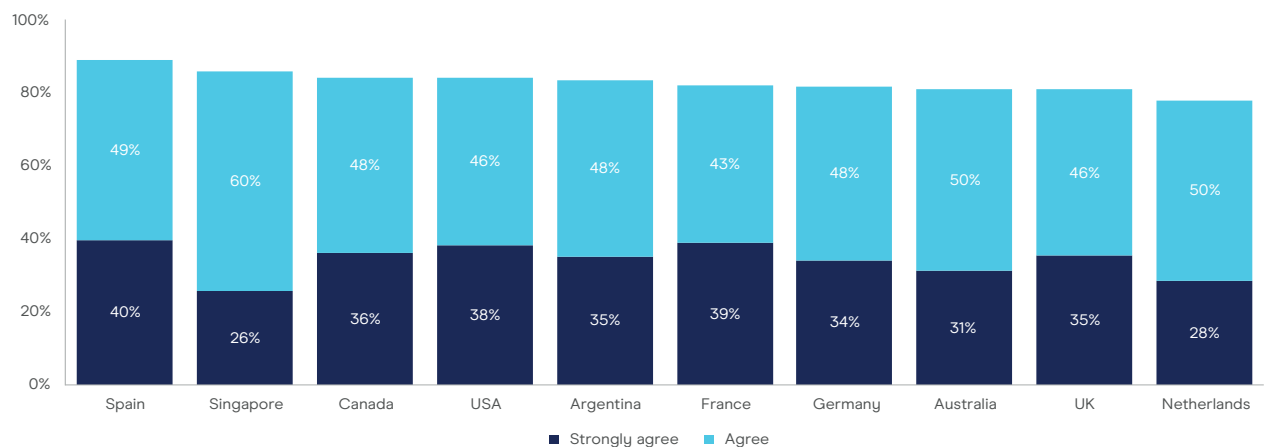
Across global markets, three consistent consumer aspirations emerge in terms driving positive engagement with the data economy – control, trust and transparency. These are crucial hygiene factors that need to be implemented in order to build the foundations for a healthy global data economy.

Control remains key

The first foundation for healthy data economy is to provide global consumers with an enhanced sense of control over the collection and use their personal data. Vast majorities in all global markets agree that they would like more control over the personal information that they give to companies, rising to 89% of people in Spain and only falling to 78% in the Netherlands.

“I would like more control over the personal information I give companies and the way in which it is stored”

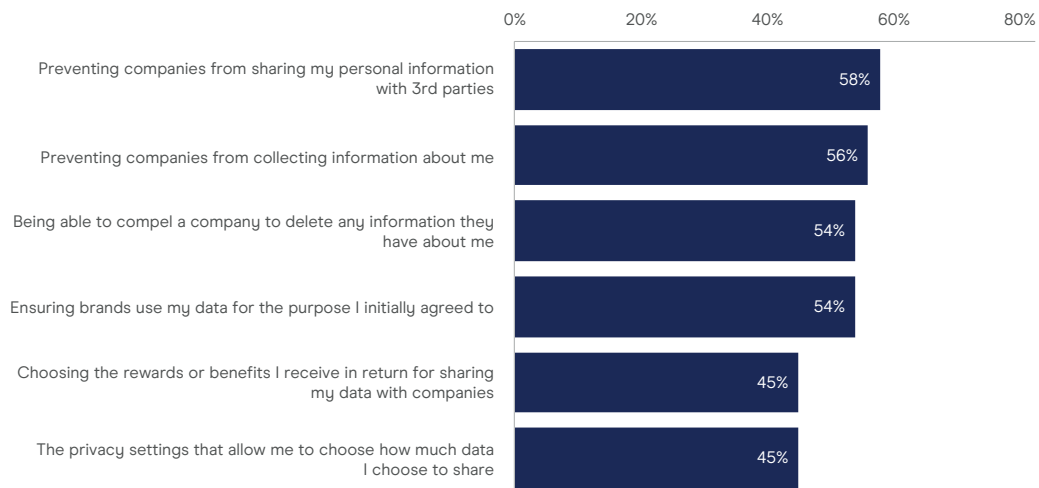
% who strongly agree or agree



Alongside this underlying aspiration for greater control, consumers across global markets indicate a consistent control deficit when it comes to data exchange. Indeed, as outlined in the chart below, significant numbers of global consumers claim to feel little or no control over key aspects of their data exchange with businesses and organisations. For example, on average across all 10 markets, 58% of consumers claim a lack of control over preventing companies from sharing their personal information with third parties. Moreover, 54% claim they have a lack of control over being able to ensure that businesses use their data for purposes initially agreed.

“How much control do you think you have over the following? Please use the scale from 1 to 10 where 1 is ‘I don’t feel I have any control at all’ and 10 is ‘I feel that I have complete control’”

Net who do not feel in control



Building trust is paramount

The second foundation of a healthy global data economy will be building and communicating a greater level of corporate trust, both at an individual business level and for the data industry as a whole. Indeed, when global consumers were asked to rank the key factors that would encourage the sharing of personal data, trust in the business or organisation consistently emerged as the most important. On average, just under half of consumers across the 10 markets put trust in an organisation in their top three factors. This compares to just 36% of global consumers who selected the second highest ranking factor; receiving free services or products in exchange for their information.

“Please rank the following in terms of what makes you happy to share your personal information with a company?”

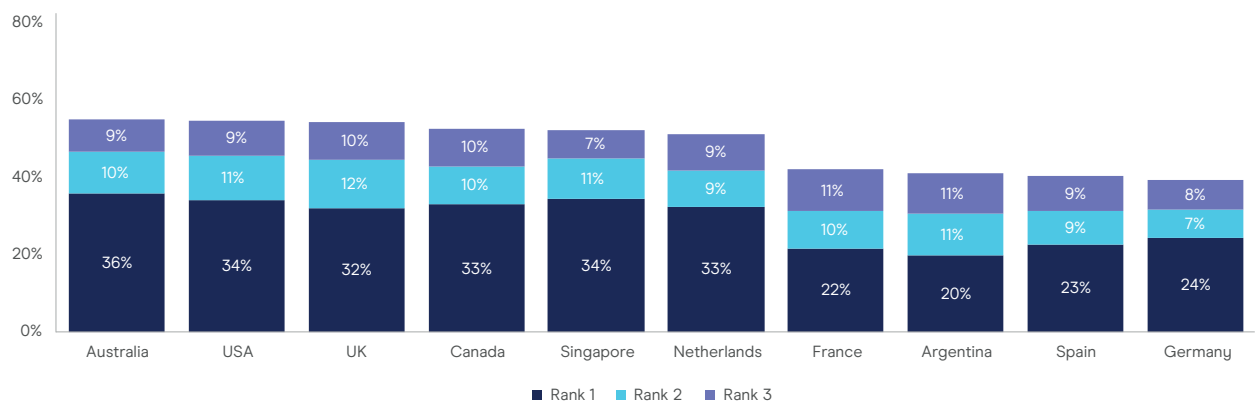
% who rank each option in their top three, Global Average



While trust in an organisation is a key driver of data exchange across all markets, the extent to which this is the case does vary across global markets. For example, trust as a precursor of exchanging personal information reaches around 55% agreement in markets such as Australia, the USA and the UK. But this falls to around 40% in Spain and Germany.

“Please rank the following in terms of what makes you happy to share your personal information with a company?”

% who rank ‘I trust the organisation’ in their top three



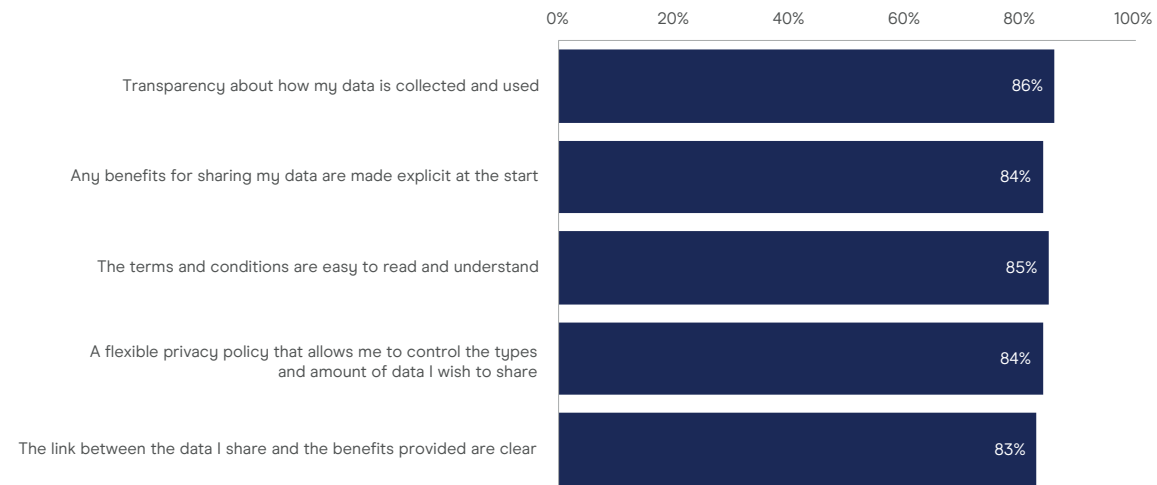
Despite such regional variations, trust remains a key foundation for driving healthy engagement with the data economy across global markets.

Consumers seek transparency

The third foundation for building a healthy global data economy is providing consumers with a greater sense of transparency over the collection and use of their personal data. As demonstrated in the chart below, the vast majority of consumers globally claim that a range of transparency features are critical when sharing information with industry. For example, 86% of global consumers claim that transparency over how their data is used and collected is important to them when sharing their personal data with a business.

“How important are each of the following to you when sharing your personal information with a company?”

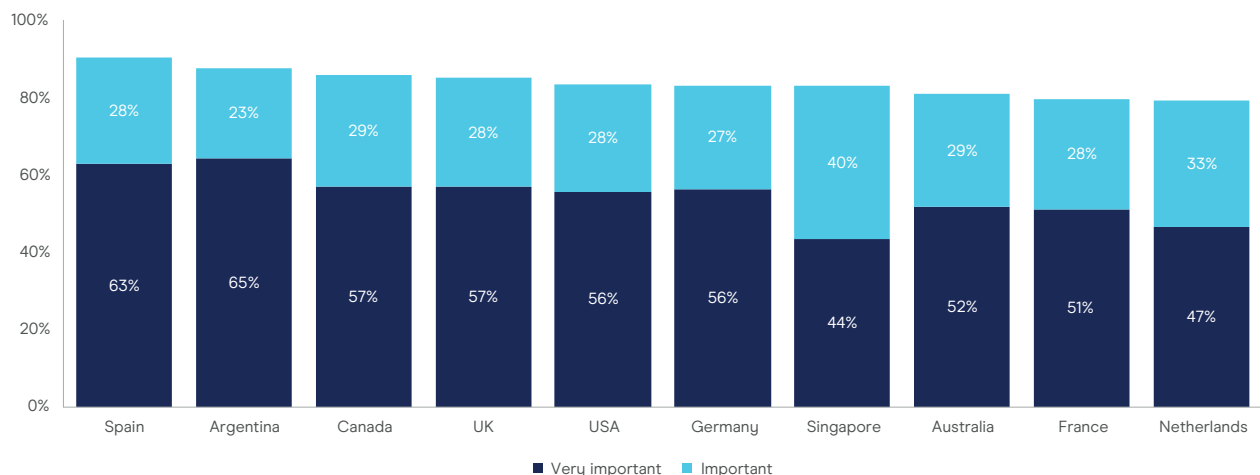
% who say very important or important, Global Average



The chart below highlights the consistent importance of transparency about how data is used and collected as a driver of data exchange across all global markets. Indeed, agreement reaches 91% and 88% in Spain and Argentina respectively and falls to around 80% in France and the Netherlands.

“How important are each of the following to you when sharing your personal information with a company?”

Transparency about how my data is collected and used



Control, trust and transparency form the foundational basis for healthy global data economy. Once these are in place, businesses and organisations will be in a much stronger position to engage consumers within the data economy. The array of engagement strategies and tools that can utilize will be explored below.

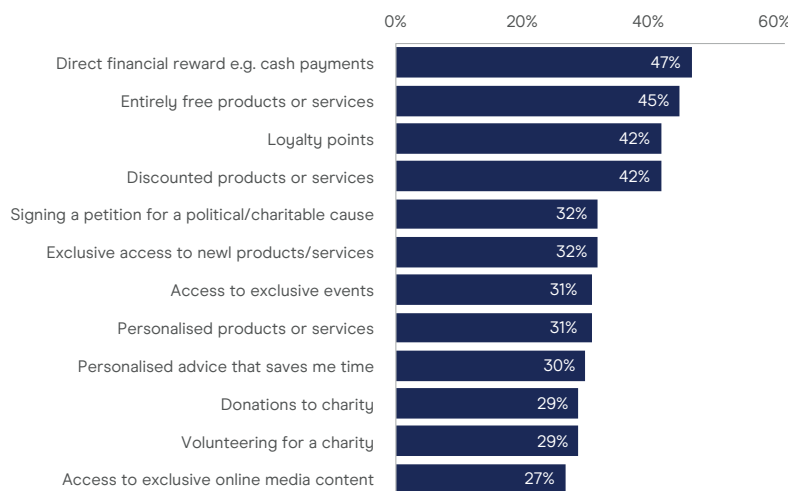
Incentivising data sharing

Once the foundational factors outlined above are in place, global consumers indicate that there are a wide range of incentives that industry can use to engage them within the data economy. For example, approaching half of global consumers would be likely to share their personal information in return for direct financial reward or free products/services. At the same time, almost a third of global consumers would be likely to share their personal data in return for personalised products, services and advice.

The fact that only a minority of global consumers show a willingness to exchange personal data, across all the incentives tested in this research, demonstrates the importance of communicating and reinforcing the current value exchange model for the data economy. However, the significant minorities that indicate an eagerness to exchange personal information for such a wide range of possible incentives, highlights the arsenal of tools available to industry when engaging customers within the global data economy.

“How likely would you be to share your personal information in exchange for the following incentives?”

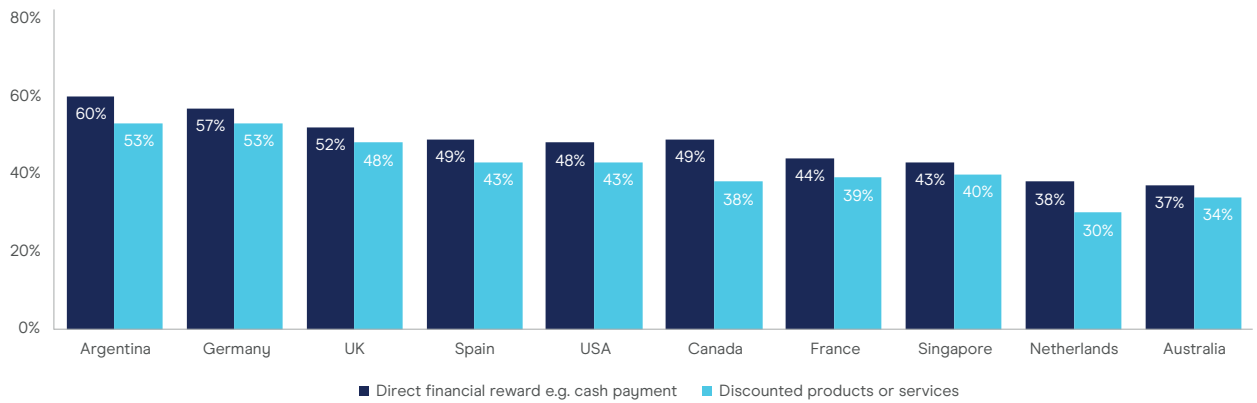
% who select each option | % who say likely (1-4), Global Average



Across global markets, there are clear differences in terms of the appeal of incentives for exchanging personal information. Indeed, consumers in markets such as Argentina, Germany and the UK show far more interest in incentives for data sharing compared to their counterparts in markets such as the Netherlands and Australia. For example, while 53% of German consumers would likely exchange their personal information in return for discounted products/ services, this falls to just 30% in the Netherlands.

“How likely would you be to share your personal information in exchange for the following incentives?”

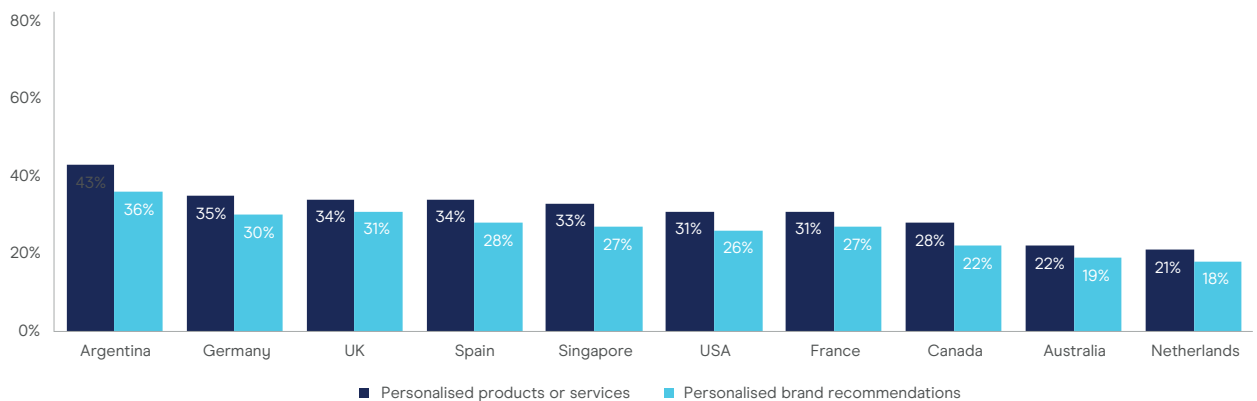
% who say likely (1-4)



At the same time, 43% in Argentina would be likely to share their personal data in return for personalised products or services compared to just 22% in Australia.

“How likely would you be to share your personal information in exchange for the following incentives?”

% who say likely (1-4)



There are clearly variations in how open global markets are to different data engagement channels and offers. Indeed, businesses across these nations will have to create tailored and innovative incentivisation strategies that cater to the specific needs and aspirations of customer groups within their respective markets.

Despite this, it is clear that the global consumer landscape is receptive to a significant range of incentives that industry can utilise to strengthen the value exchange on offer and nurture a healthy future data economy.

/ Part 3: Global Rights and Responsibilities

Global consumers show significant levels of autonomy and responsibility for their engagement with the data economy, as well high levels of awareness over the public discourse of data security issues and concerns.

However, evidence from European markets suggests that more will need to be done to raise awareness and understanding of the specific regulatory frameworks and protections that are in place. Such measures will help nurture the wider sense of empowerment demonstrated by consumers across global markets.

At the same time, efforts will need to be made to communicate the importance and benefits of cross-industry and government data sharing; to ensure the future data economy can rise to the challenges posed by a rapidly changing and turbulent technological landscape.

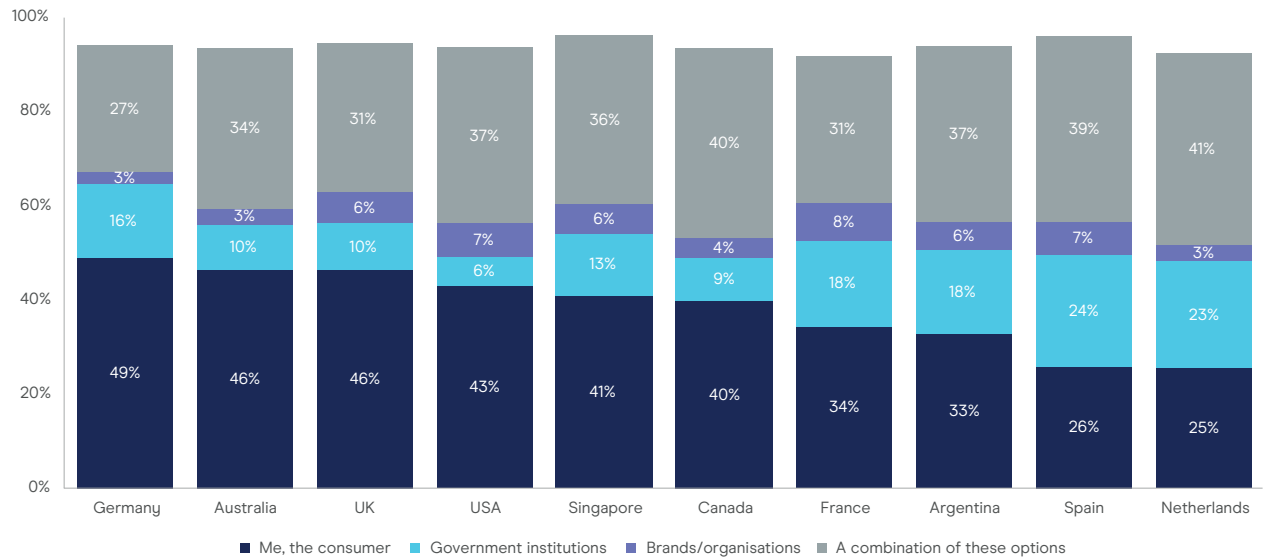
Significant levels of individual responsibility

Global consumers display a high level of personal responsibility when it comes to their data security. When asked whether the government, industry or individual consumers should have ultimate responsibility for data security, respondents were most likely to select the consumer across all markets. On average, 38% of consumers globally claim that they have ultimate responsibility for their own data security. In comparison, 15% claim that government institutions have ultimate responsibility and just 5% stated that brands/organisations did. Just over a third (35%) believe that such responsibility should be held by a combination of these options.

As the chart below demonstrates, such opinions do vary across markets. For example, consumers in Spain and the Netherlands place significantly more responsibility on government institutions, vis-a-vis consumers, compared to other markets. However, in Germany, Australia, the UK and the USA we find a much more notable view that consumers themselves are the ultimate gatekeepers of their own data security. Indeed, in the USA, just 6% believe that ultimate responsibility should lie with government institutions; compared to 43% who claim it should lie with consumers. Less than 1 in 10 in all markets believe that brands or organisations should have ultimate responsibility their data security.

“In your opinion, who should have ultimate responsibility for your data security?”

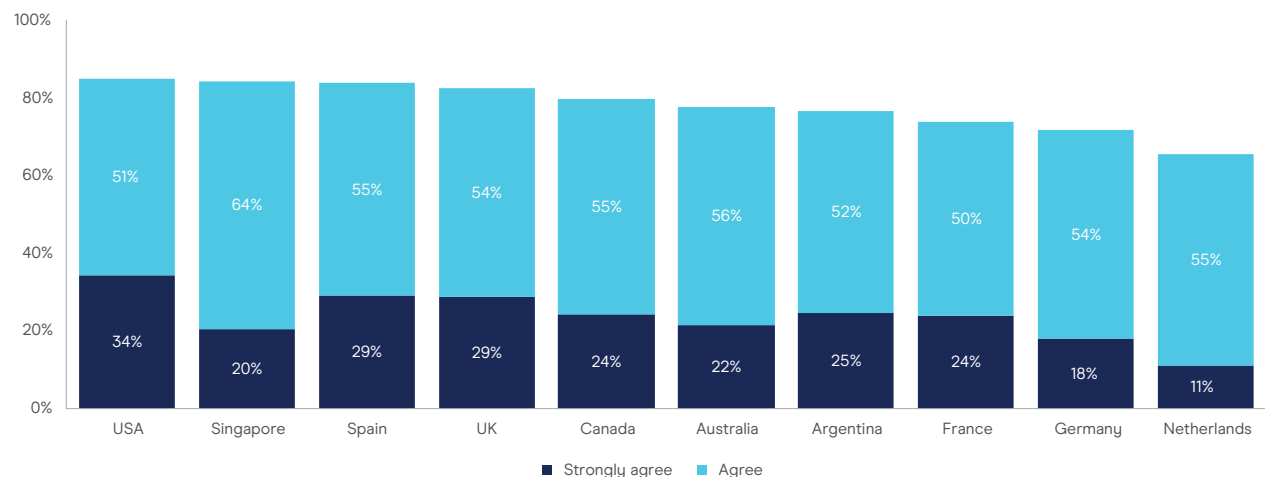
% who select each option



One driver of the high levels of personal responsibility demonstrated by global consumers is likely the significant awareness of news stories about data security. Indeed, vast majorities in all markets agree that recent news headlines about data security breaches have heightened their awareness about their personal data privacy. Agreement reaches around 85% in the USA, Singapore, Spain and the UK. Consumers in the Netherlands show the lowest agreement with this statement, falling to 66%.

“Recent news headlines about data security breaches have heightened my awareness about my own personal data privacy”

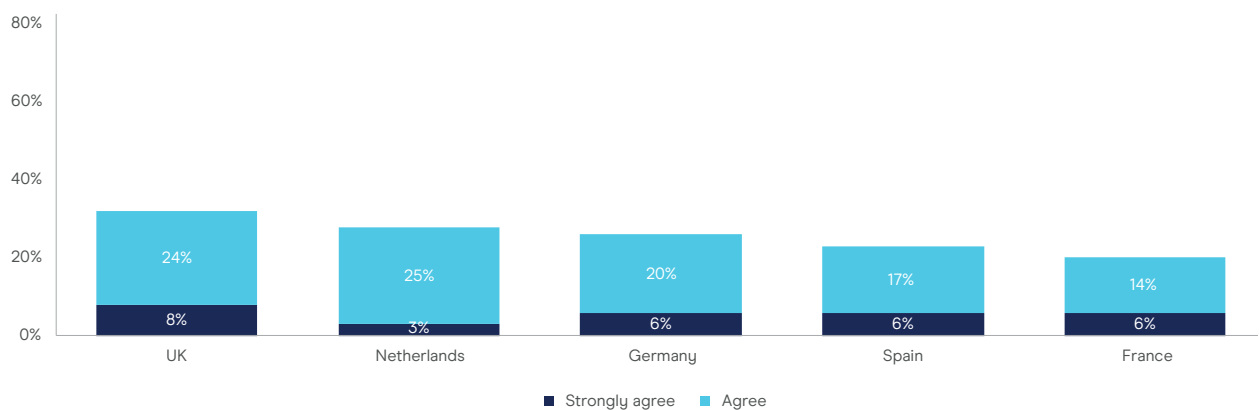
% who strongly agree or agree



However, looking at European markets specifically, there is low awareness of the new General Data Protection Regulation (GDPR) that will be introduced in May 2018. Indeed, on average across these markets, around a quarter claim to be aware of the new regulations. Awareness of GDPR is highest in the UK, rising to 32% of consumers. Conversely, awareness of GDPR falls to a low of 20% in France.

“I am aware of the new General Data Protection Regulation (GDPR) that will be introduced in May 2018”

% who strongly agree or agree | European markets only



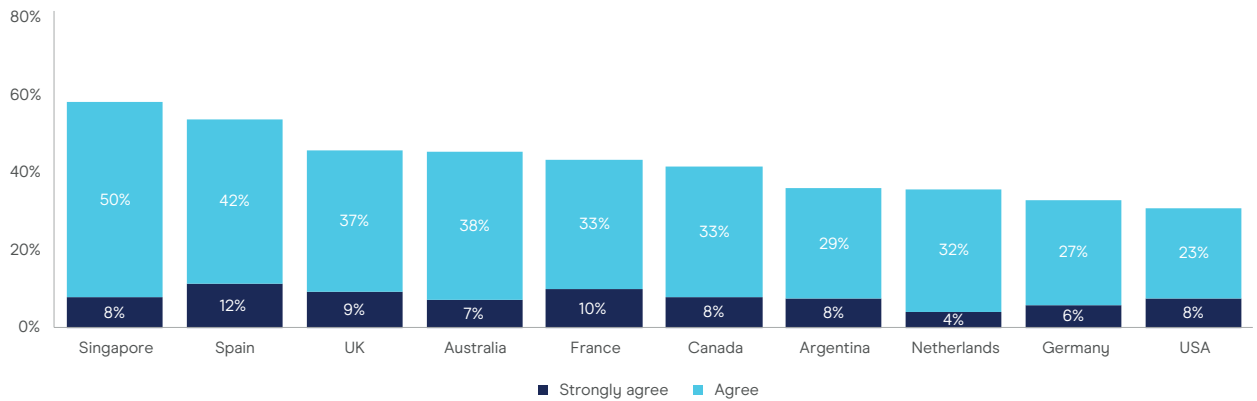
Building collaboration across industry and government

The impact of rapid technological changes predicted by the onset of the Fourth Industrial Revolution is expected to create a range of new challenges for governments and industry across the globe. Indeed, advances in areas such as the Internet of Things and Artificial Intelligence will create a range of new challenges to the global data economy; particularly in relation to privacy and security. In the face of such threats, it is widely expected that more collaboration across industry competitor silos, and across business and government more broadly, will be a crucial step to ensure the data economy infrastructure and safeguards are fit for purpose.

Interestingly, we find significant support for the sharing of data across government departments across numerous global markets. For instance, in Singapore and Spain, 58% and 54% respectively would be happy for a government department to share their personal information with other government departments to make public services more efficient. However, this falls notably in markets such as Germany and the USA; to just 33% and 31% respectively.

“I would be happy for a government department to share my personal information with other government departments to make public services more efficient”

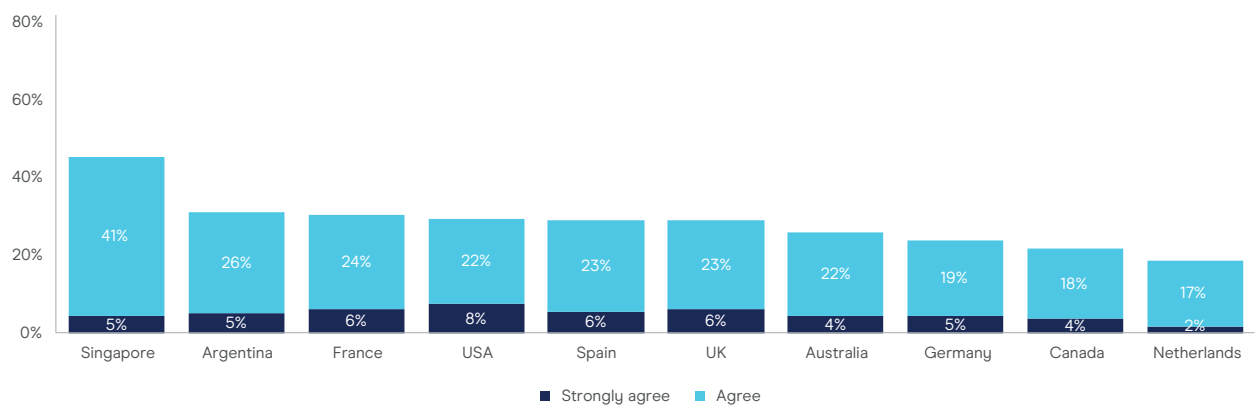
% who strongly agree or agree



Consumers are less happy for businesses to share data with other businesses in order to provide more tailored services and products. Indeed, less than a third of consumers in 9 out of 10 markets are happy for businesses to share data for such purposes. The clear exception is Singapore, where 46% of consumers are happy with cross-business data sharing.

“I would be happy for a business to share my personal information with other businesses if it will give me more tailored services and/or products”

% who strongly agree or agree



Due to the importance of more collaboration across government and industry stakeholders to drive a healthy global data economy, more will need to be done to communicate the need and benefits of such partnerships across global markets; especially with regard to data sharing across businesses.

/ Methodology

In November 2017, Foresight Factory conducted, on behalf of the GDMA, an online survey of a minimum 1,000* sample of respondents aged 18+** across 10 global markets exploring public attitudes towards privacy and data exchange. The markets included in the survey are Argentina, Australia, Canada, France, Germany, the Netherlands, Singapore, Spain, the UK and the USA.

In total, 11,474 respondents were surveyed across the 10 markets.

For this research, Foresight Factory set interlocking nationally representative quotas on age, gender and region per country. This ensured the sample was representative of the population. Weighting was also applied to further ensure a nationally representative sample.

The analysis of the data and the segmentation of findings were conducted in-house by Foresight Factory's quantitative analysis team.

*2000 respondents in USA

**18-64 in Singapore

/ About Acxiom

Acxiom provides the data foundation for the world's best marketers. We enable people-based marketing everywhere through a simple, open approach to connecting systems and data that drives seamless customer experiences and higher ROI. A leader in identity and ethical data use for nearly 50 years, Acxiom helps thousands of clients and partners around the globe work together to create a world where all marketing is relevant. Acxiom is a registered trademark of Acxiom Corporation. For more information, visit www.acxiom.com



/ About the GDMA

GDMA is an organisation that represents, supports and unites marketing associations from around the globe that focus on data-driven marketing. It promotes worldwide initiatives aimed at providing marketers with global trend information, thought leadership and know-how on data-driven marketing across all sectors, disciplines and channels.

Twenty-seven marketing associations are currently part of GDMA and more countries will join as their marketing associations begin to undertake the data-driven marketing remit. Collectively, they represent a significant proportion of the world's major brands, corporations, suppliers and agencies. Through its members' associations, GDMA provides access to the world's largest network of data-driven marketing organisations and influencers.

For more information, visit www.dma.org.uk



/ About Foresight Factory

Foresight Factory is a leading international consumer futures business. Our core expertise is based on identifying and forecasting social and consumer trends and determining the extent of their impacts on markets, services, brands and products. Since our launch in 1996, we have worked to meet the strategic needs of businesses through the application of insight. We identify measure and examine trends, attitudes and behaviours through the rigorous analysis of quantitative and qualitative research. Our robust programme of research provides businesses with the grounding and confidence to anticipate the likely impact of the evolving consumer environment and identify new market and revenue opportunities. For more information, visit www.foresightfactory.co

