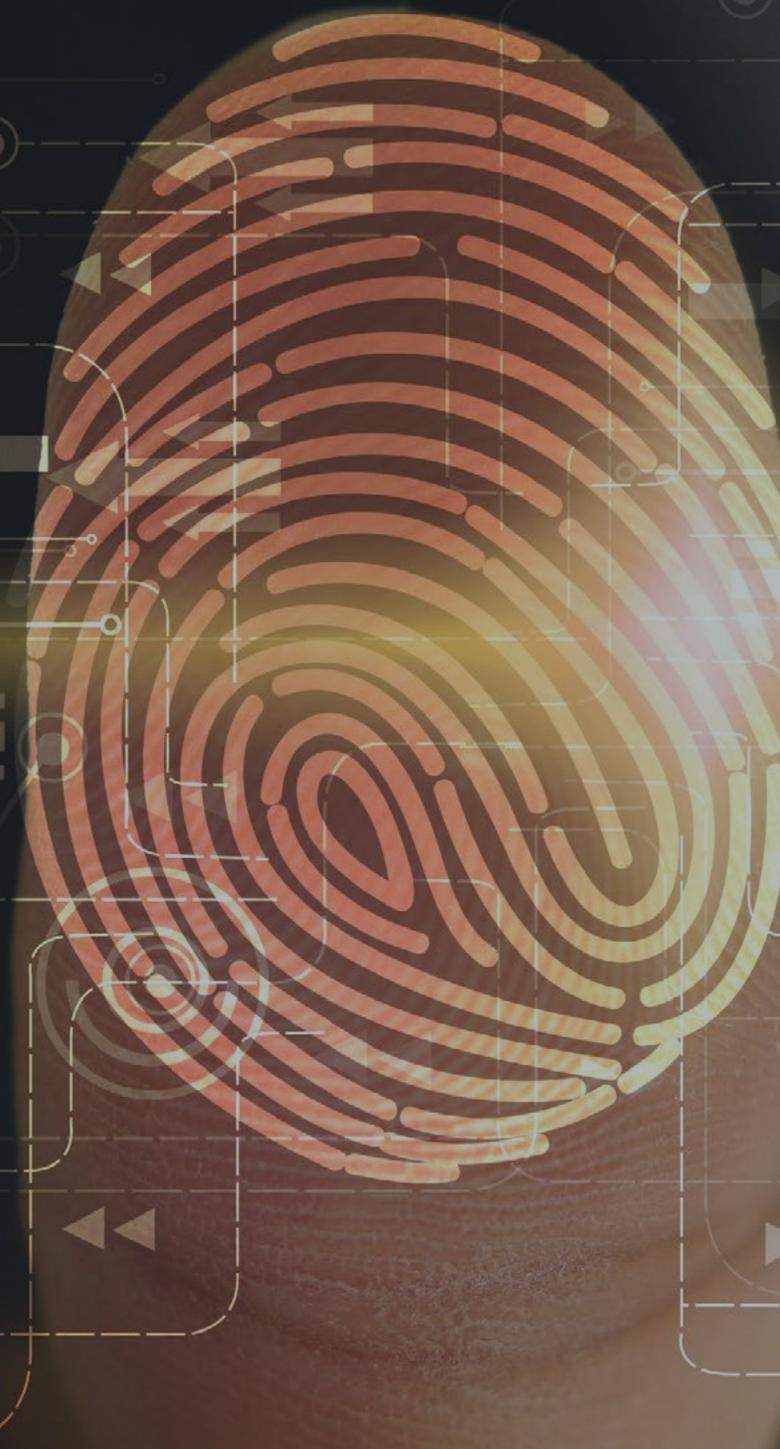


# GLOBAL TRENDS

## SPOTLIGHT

### PRIVACY & TRUST REPORT





Issues around data privacy affect us all to varying degrees. We are increasingly warned about the dangers of identity theft whilst for businesses, data is the fundamental key to gaining a competitive advantage. Building upon the findings in the 2019 Dynata Global Trends Report, this spotlight report will explore four key themes: transparency with data, the value exchange, familiarity and privacy.

Across the nine countries in the report (the US, Canada, UK, France, Germany, the Netherlands, Australia, China, and Japan), very few consumers report **never** being asked to provide personal information to websites. Among those who are asked to provide such information, the majority provide false information, at least some of the time, **with only 39% saying they always provide their correct information.** We expect this phenomenon to increasingly become an issue with 70% of millennial's providing false information at least some of the time. Countries that are traditionally seen as 'privacy conscious' - such as Germany - are higher in terms of providing false information, as is China.

# Transparency with Data

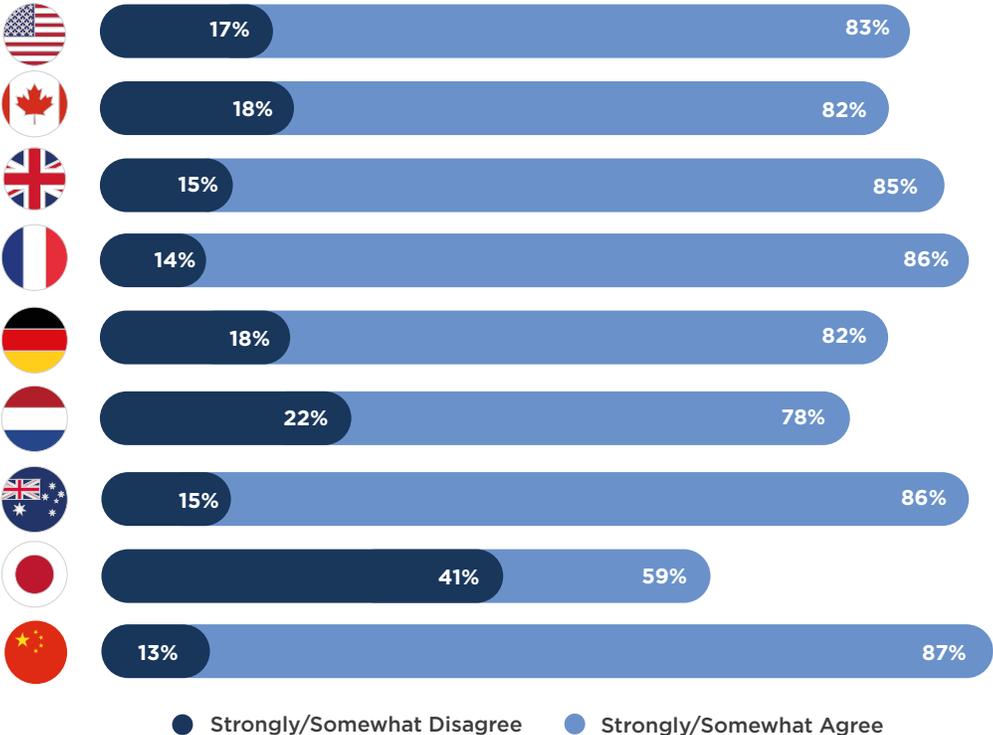
To overcome the resistance to sharing personal information, transparency and choice are key. When presented with a list of how companies could use their data, just under a half (48%) of respondents said they want to make it easy to choose what to share or not share, a similar number (47%) asking for an opt-out of sharing. This doesn't necessarily mean that personal information will never be provided, just perhaps that a trusting relationship needs to be built up first initially, with the first step being transparency, which was found to be important across all generations.

**48%** want companies to make it easier to **choose what to share or not share**



When it comes to data sharing the response is clear: 81% strongly or somewhat agreed that they would be more willing to share their data with businesses “if they were more transparent about how they were going to use it.” A similar number (80%) agreed that “consumers have lost control over how personal information is collected and used by companies.” Seventy-one percent agree with the notion that companies have been dishonest about how personal data is used. However, the battle for data is still not lost; three-quarters agree that they would be willing to share their data if there is “a clear benefit for me.”

## Agree or Disagree? ‘I would be more willing to share my data with businesses if they were more transparent about how they were going to use it’



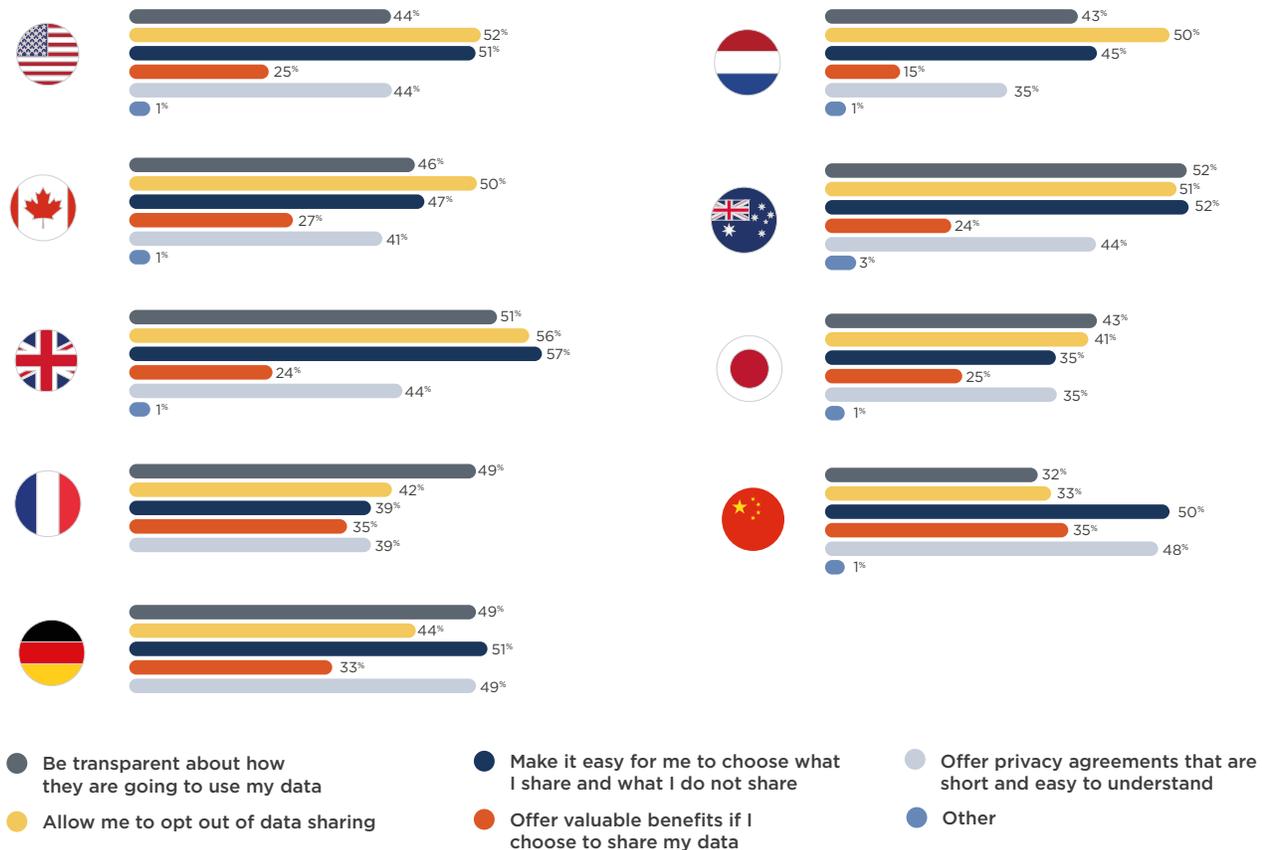
# The Value Exchange

Surprisingly the notion of a value exchange carries less traction than a trust relationship. Just 27% said they would feel more comfortable if valuable benefits were offered in exchange for their data. The reaction to this was noticeably higher in France and China (35% each) and in Germany (33%). Consumers in the Netherlands are not in favor of this, with only 15% endorsing it. Baby Boomers (at just 20%) are the generation least likely to support this practice; however, there is little variation across the age generations under 55 years old, with just under one in three in saying they would like to receive “valuable benefits.”

It is possible to get consumers to react positively to examples of valuable benefits or other offers of compensation for their data, however. For example, 60% of respondents in the study said they would like to receive discounts and other perks as compensation in exchange for their data.

It is possible that consumers may harden in the view that they have been misled and become more reticent in their offer to share data in exchange for clear benefits. It may even transpire that consumers wish to regain control over their data and sell to the highest bidder. This concept of the Attention Economy is a topic we will explore in more depth in the Dynata 2020 Global Trends Report.

## “How can companies make you feel more comfortable when being asked to share personal information?”



# Familiarity

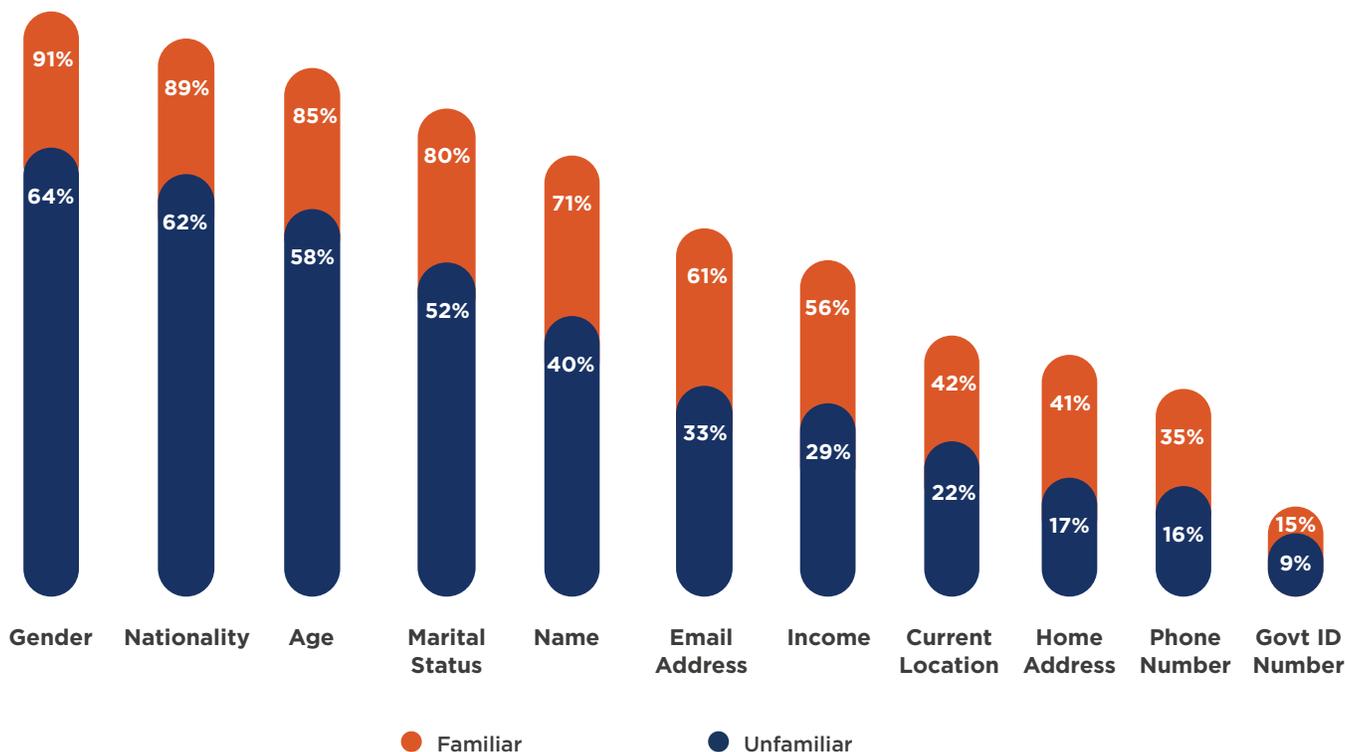
In 2019 it is clear that the key first step to establishing trust is familiarity. So often the request for data is made at the very start of what will become an ongoing and fruitful business relationship. If there is mistrust on one side, then this relationship may never begin.

Our study found that consumers feel most comfortable sharing their data with companies with strong brand familiarity. For example, 85% would share age, 89% nationality, and 90% would share their gender with a company they were familiar with.

**85%** would share their age with a company they were familiar with. 

The easiest piece of information to collect is gender. Two-thirds (64%) of participants said they were very or somewhat willing to share this with a company they were unfamiliar with. A similar number (62%) also said they would share their nationality. Just 58% will share their age (not necessarily their date of birth) and half would let a company know their marital status. Only 40% would be willing to share that most basic of information – their name – with a company they were unfamiliar with. From here it gets increasingly difficult: email address (33%), income (29%), current location (22%), home address (17%), phone number (16%), and to put this into context – since very few reputable companies would ever ask for this, and hopefully few would give it – a Government ID number (9%).

## Willingness to Share Information by Type of Company



# Privacy

---



Respondents in the study reported that they have already taken direct action due to privacy concerns and that this will affect business. Twenty-nine percent, in the past year, actively avoided websites, or left them during a visit, due to privacy concerns. A similar number (30%) took similar action on their phone by deleting or not downloading an app. They have also taken a more robust stance on data protection. A quarter adjusted their privacy settings on social media, a similar number opting not to share their opinions. Three in ten adjusted privacy settings on their phones and just slightly fewer disabled some cookies. As each of these actions are taken, trust decreases, and business becomes more difficult.

# 29%

actively avoided websites  
or left them during a visit  
due to privacy concerns.



Some of these items are necessary for transaction or fulfilment needs and so are often stated on the form with such caveats in place. Others are potentially useful for targeting: income for example and, increasingly in the modern world, current location.

A great deal of work may be required by corporations to understand how to overcome resistance to sharing these data points. This will start with trust, but also require some convincing of the benefits of sharing - benefits to the consumer that is, not to the company requesting the information.

The 2020 Dynata Global Trends Report, covering this topic in-depth, will be available in early 2020.

# Parting Words

---



## AUTHOR

**Pete Cape**

*Global Knowledge  
Director*

A great deal of work may lie ahead for brands to help consumers overcome their concerns around threats to their personal information. As consumers become more aware of the consequences of their data being misused or compromised, their resistance to sharing this information grows. It is clear, however, that brands can get past this scepticism by embracing transparency and engaging in a true and fair value exchange with consumers around the benefits of sharing data. Everyone learned at an early age that “honesty is the best policy”; for brands, endeavouring to be more open and honest about their intentions behind asking for – and practices for using – personal information can help build, the consumer trust and brand affinity corporations seek in today’s competitive marketplace.

---

This report draws upon research conducted by Dynata across 9 countries: the US, Canada, UK, France, Germany, the Netherlands, Australia, China, and Japan from November, 2018 – February, 2019. Online interviews were conducted amongst Dynata’s proprietary panels and samples quota controlled to reflect the population on age, gender, and region. When global stats are reported here, they are an average across the countries studied. Country level data is also reported and identified accordingly. For additional data for individual countries as well as on other key topics, please refer to the [2019 Dynata Global Trends Report](#).

## About Dynata

Dynata is one of the world’s leading providers of first-party data contributed by consumers and business professionals. With a reach that encompasses 60+ million people globally and an extensive library of individual profile attributes collected through surveys, Dynata is the cornerstone for precise, trustworthy quality data. The company has built innovative data services and solutions around its core first-party data offering to bring the voice of the customer to the entire marketing spectrum, from market research to marketing and advertising. Dynata serves nearly 6,000 market research agencies, media and advertising agencies, consulting and investment firms, and healthcare and corporate customers in North America, South America, Europe, and Asia-Pacific. For more information, go to [www.dynata.com](http://www.dynata.com)

