

DIGITAL DATA EXCHANGE : THE CONSUMER VIEW

Consumer perceptions of data privacy, data monitoring and value exchange.

October 2021



OBJECTIVES

Context & Goals of the Project

The Office of the Australian Information Commissioner (OAIC) study conducted in 2020 into *Australian Community Attitudes to Privacy* noted that for 70% of Australians privacy was a major concern, particularly in terms of the nature of control they have about their personal information in the digital space.

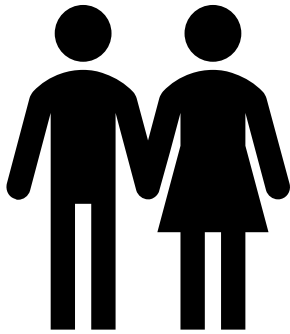
With this in mind, and thinking about the context of the Australian online digital media space, this project sought to further understand :-

1. What the consumer understanding is regarding data privacy and monitoring of their online activities – what is being collected, how its being used ?
2. What the awareness and comfort is about the value exchange for consumer data – what are the tensions, what is valued and what is seen as an acceptable commercial exchange?

It should be noted, the aim was not to replicate previous studies, rather to inform the commercial implications of what is known (or not) by the Australian public.

METHODOLOGICAL OUTLINE

STAGE 1: Qualitative



- 10 people (IDI via phone, 20 mins)
- Equal split of men and women
- Age range 25-55
- Mix of blue and white collar
- Metro Sydney, Melbourne and Perth
- September 13-24th, 2021

STAGE 2: Quantitative



- n=1000
- 18+ Australia wide
- Nationally representative
- 10mins online survey
- October 4th – 10th 2021

WHAT WORRIES THE WORLD RIGHT NOW?

Uncertainty and the desire for stability and structure underpins the world we live in.

(Global country average)



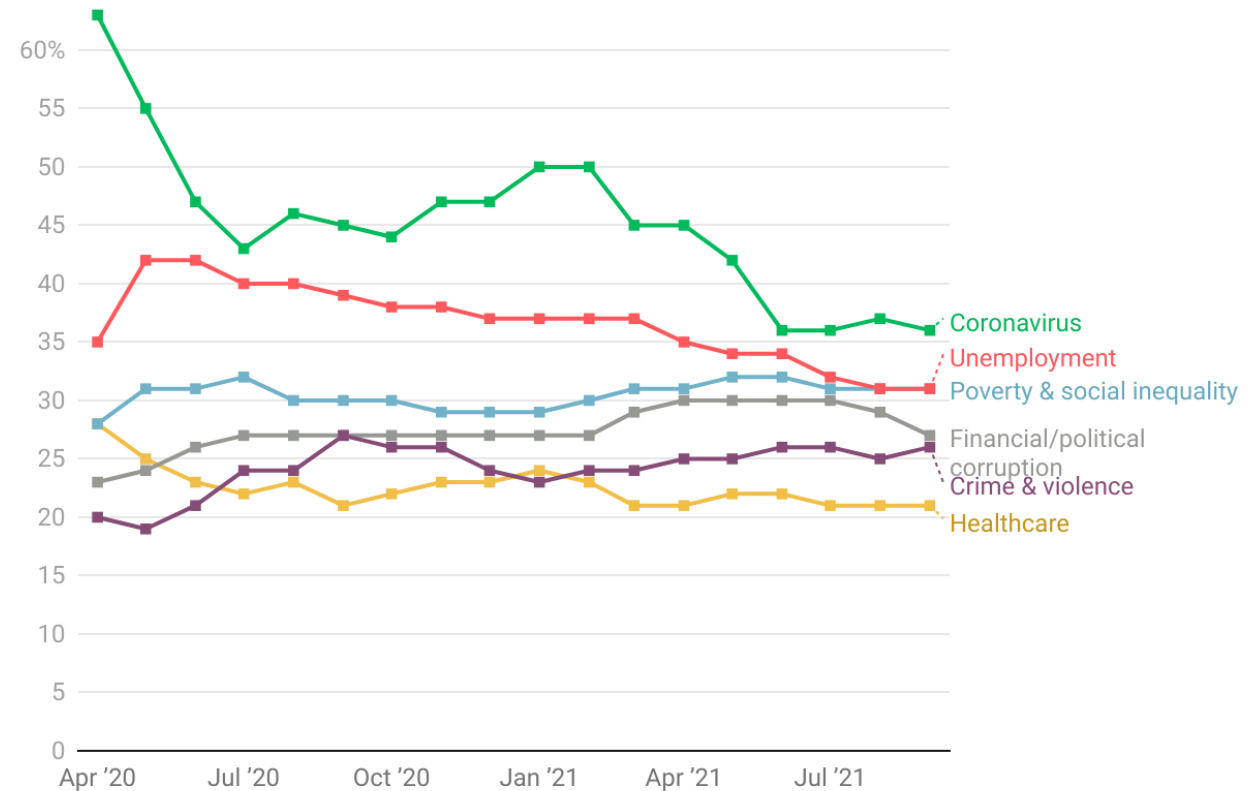
Research among c. 20,000 adults aged 16-64 in 28 participating countries. August 20th – September 3rd 2021.

Source: (Ipsos Global Advisor) • Created with Datawrapper



Over the last 18 months crime & violence has started to increase as health concerns have started to ease

April 2020 - September 2021 (global country average)



Research among adults aged 16-64 in 28 participating countries. c. 20,000 per month. April 2020 - September 2021
Source: Ipsos Global Advisor • Created with Datawrapper



Top 10 emerging risks

Data related risks around security, AI and big data are a prominent concern.

#1. CLIMATE CHANGE

#2. CYBER SECURITY RISKS

#3. PANDEMICS AND INFECTIOUS DISEASES

#4. GEOPOLITICAL INSTABILITY

#5. SOCIAL DISCONTENT AND LOCAL CONFLICTS

#6. NATURAL RESOURCES AND BIODIVERSITY RISKS

#7. NEW SECURITY THREATS AND TERRORISM

#8. FINANCIAL STABILITY RISKS

#9. MACRO-ECONOMIC RISKS

**#10. RISKS RELATED TO
ARTIFICIAL INTELLIGENCE AND BIG DATA**

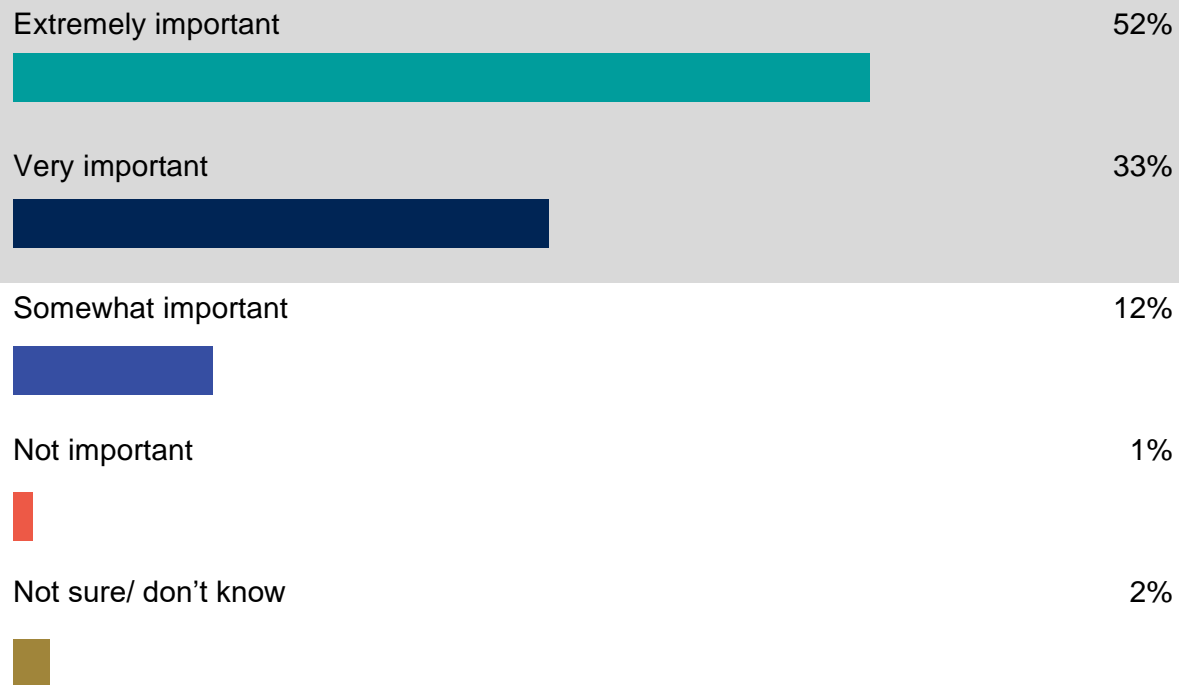
Source: AXA 2021 Future Risks Report

n=23,000

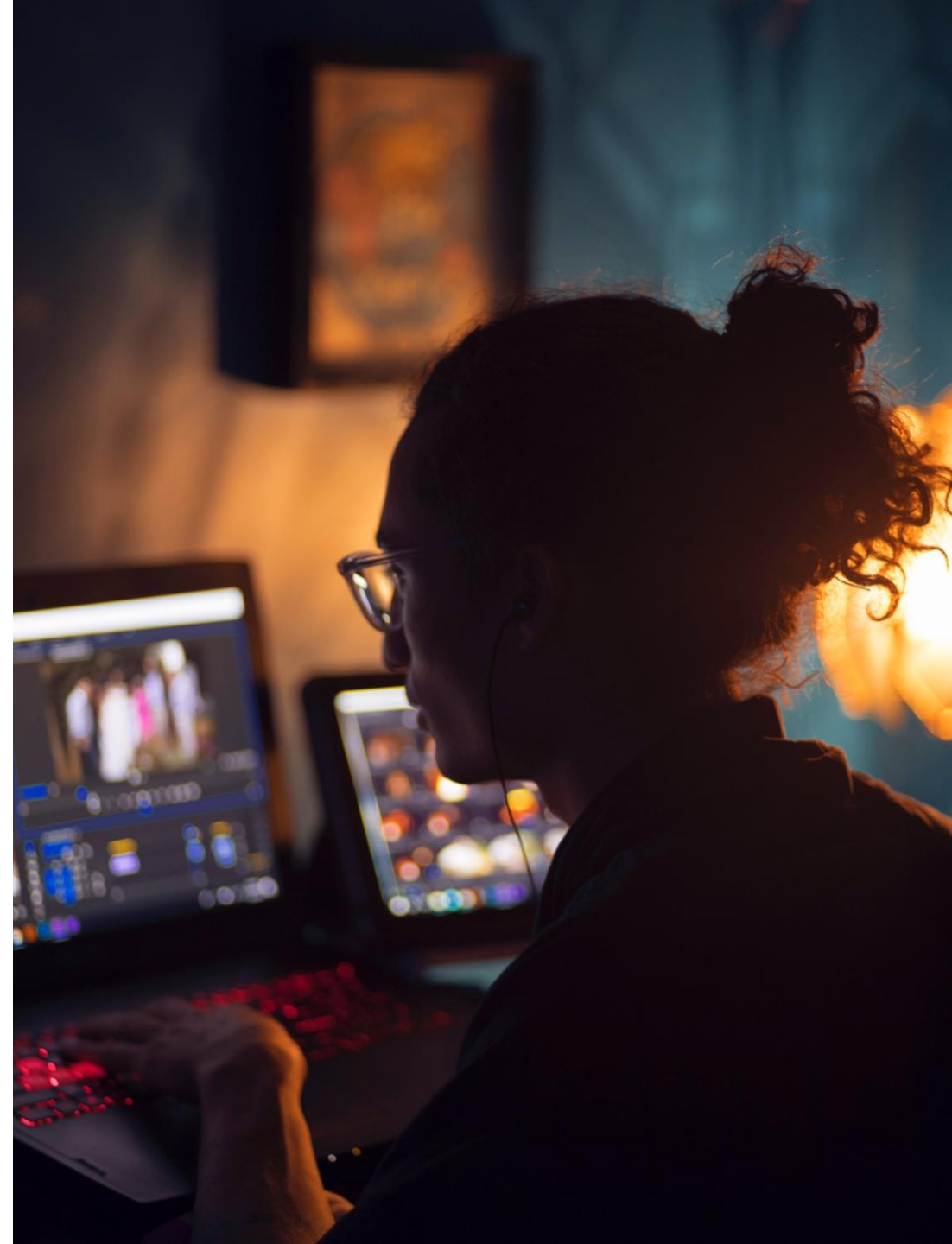


DATA PRIVACY

PRIVACY IS PARAMOUNT FOR 8 IN 10 AUSTRALIANS WHEN IT COMES TO CHOOSING THEIR ONLINE EXPERIENCE



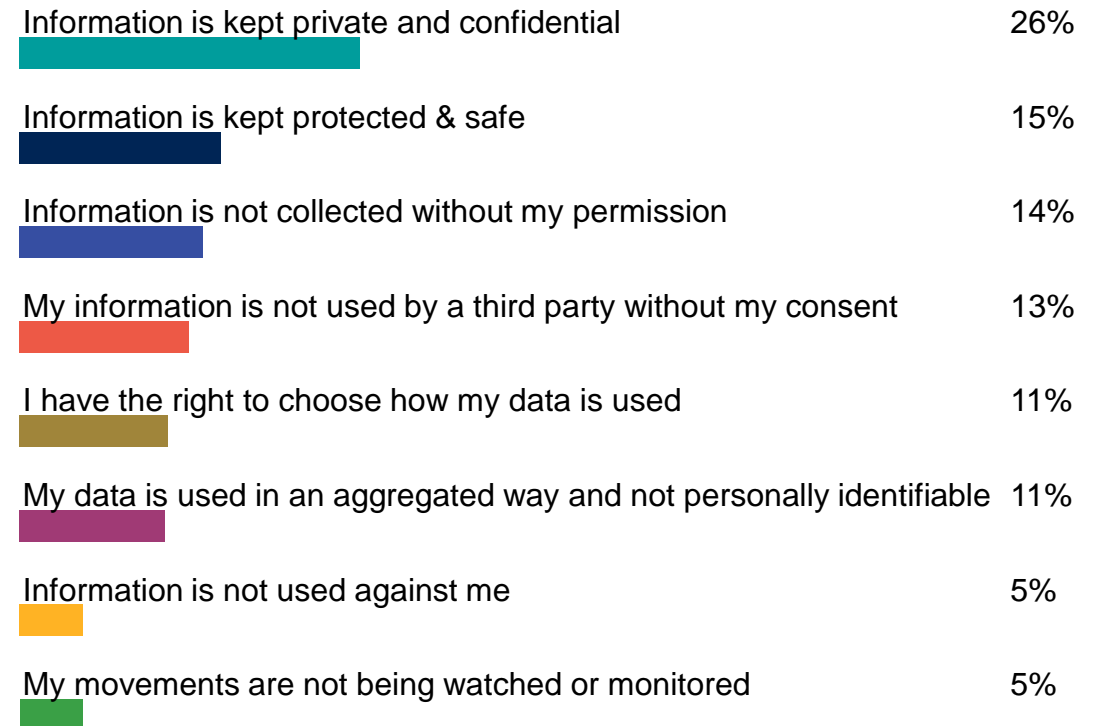
Ipsos Oct'21 Australia ~ How important is the privacy of your information and data when choosing a digital service? n=1000





“Its about how data information, how your personal usage online is being protected ”

TO THE CONSUMER DATA PRIVACY MEANS EFFECTIVE SECURITY OF PERSONAL INFORMATION



Ipsos Oct'21 Australia ~ Which statement from the list below, best describes what the term data privacy means to you? n=1000



AUSTRALIANS WANT MORE CONTROL AND CHOICE BUT ARE NOT SURE WHAT TO DO ABOUT IT

I care about my data privacy, but I don't know what to do about it



69 %
Agree

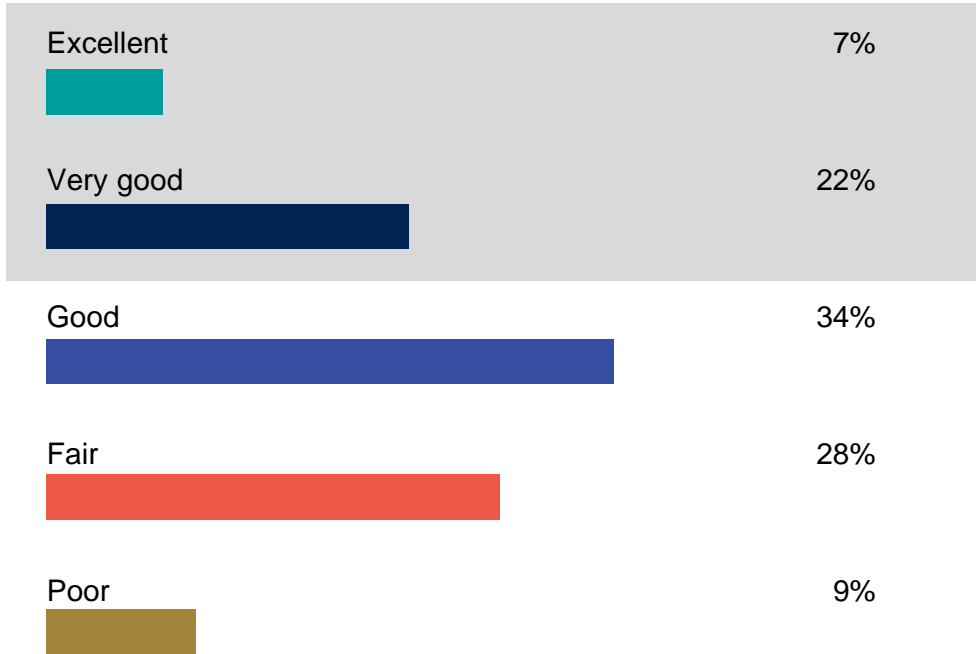
I want more control and choice over the collection and use of my personal info



81 %
Agree

Ipsos Oct'21 Australia ~ Thinking about data protection and privacy, to what extent do you agree or disagree with the following statements? n=1000, T2B Strongly/somewhat Agree

BUT ONLY 3 IN 10 FEEL THEIR UNDERSTANDING OF DATA PROTECTION AND PRIVACY RIGHTS IS OF A HIGH STANDARD



Ipsos Oct'21 Australia ~ How would you rate your understanding of data protection and your privacy rights? n=1000

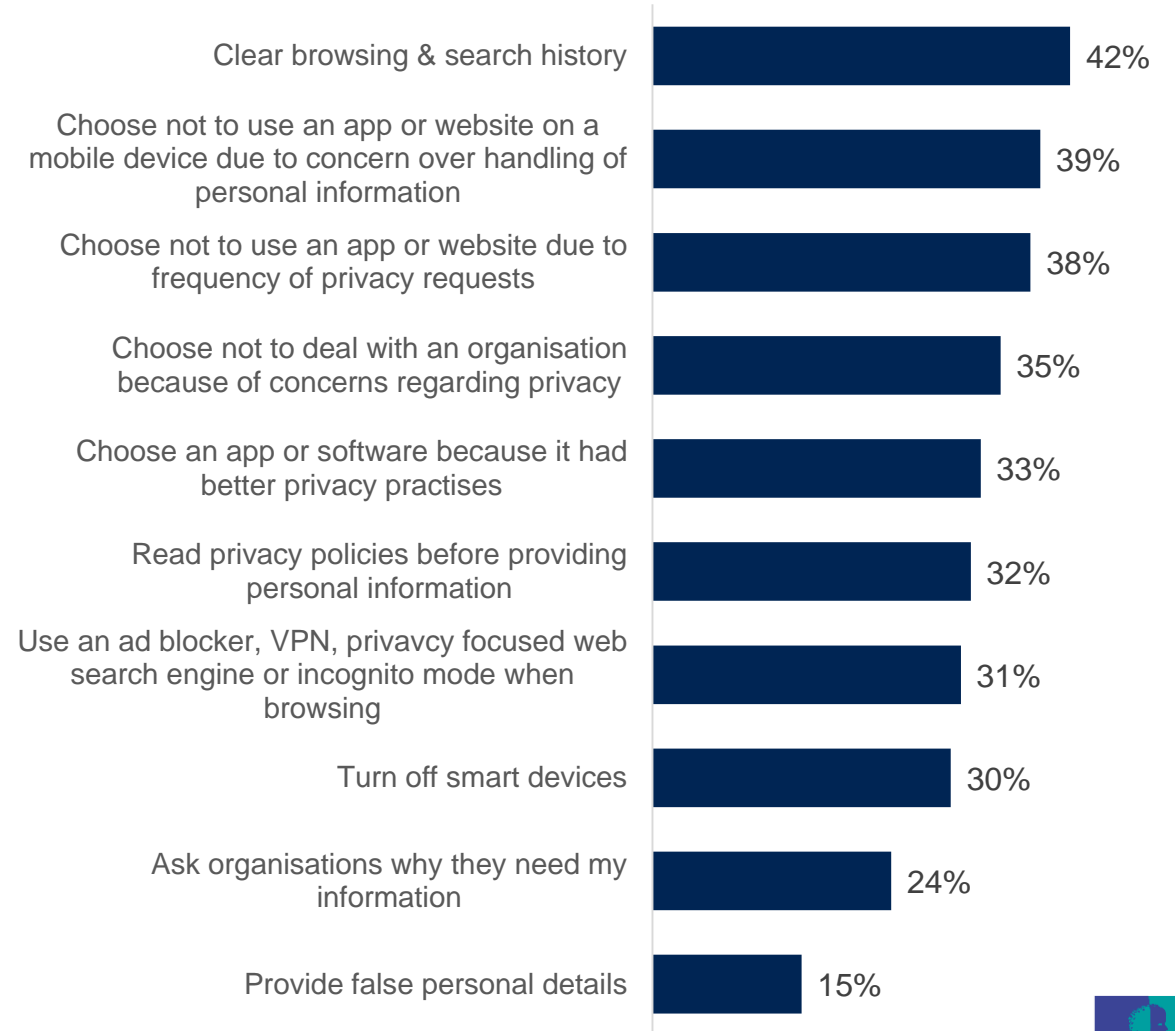


I am not fully aware of how this is done



I go into settings to disable them.. If it will not allow me to bypass them I actively avoid them”

TO MITIGATE THIS UNCERTAINTY THEY ARE...

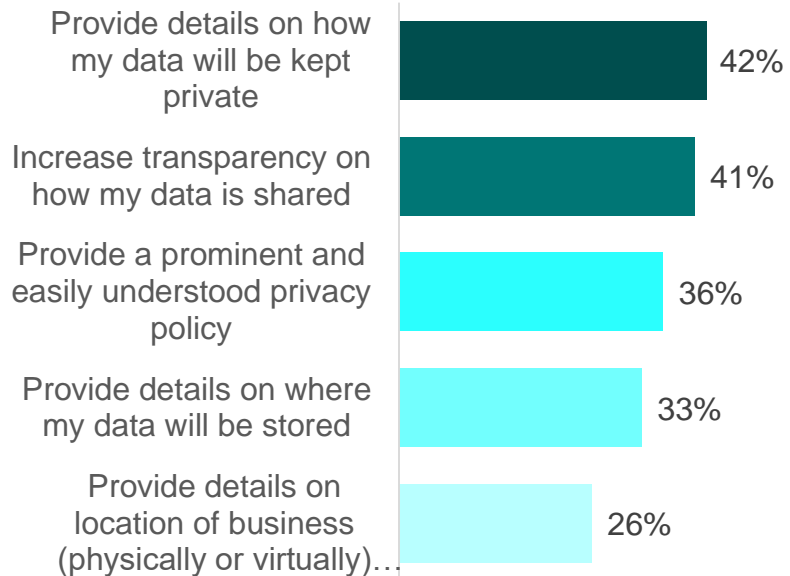


Ipsos Oct'21 Australia ~ Thinking about data protection and privacy, how often would you say you do the following? n=1000, T2B

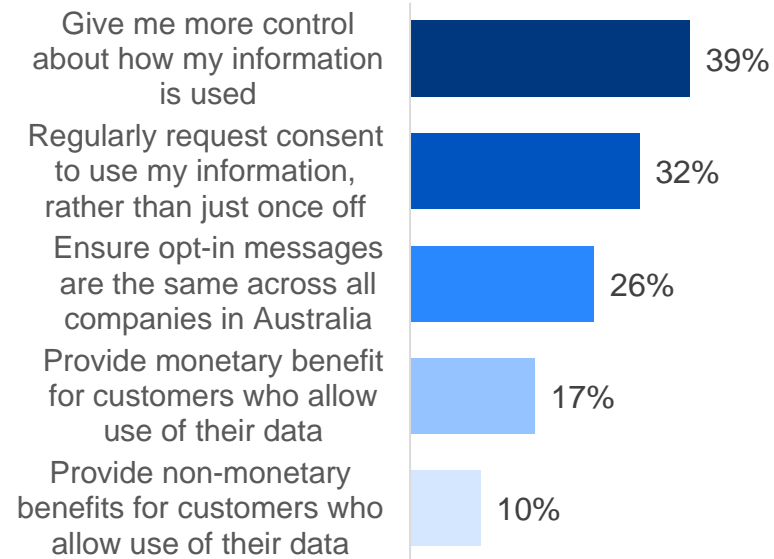


BUSINESS CAN INCREASE COMFORT THROUGH TRANSPARENCY AND GIVING CONSUMERS MORE CONTROL AROUND DATA SHARING

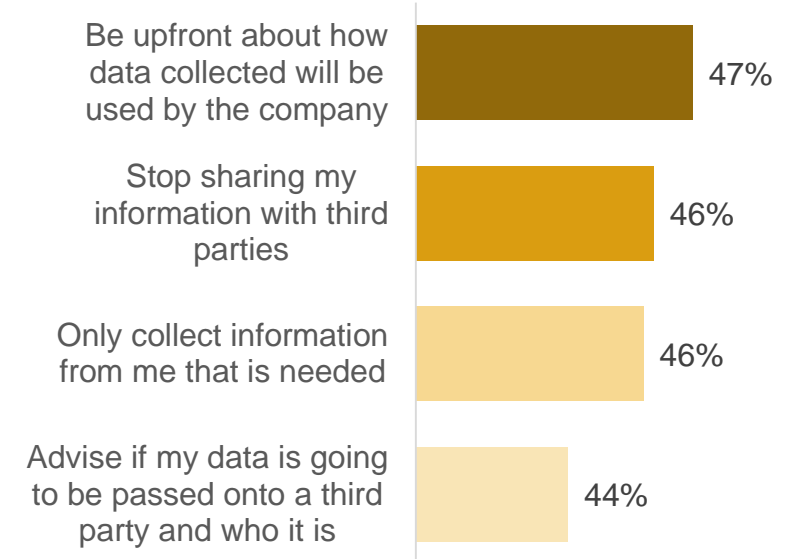
TRANSPARENCY



CONTROL



SHARING

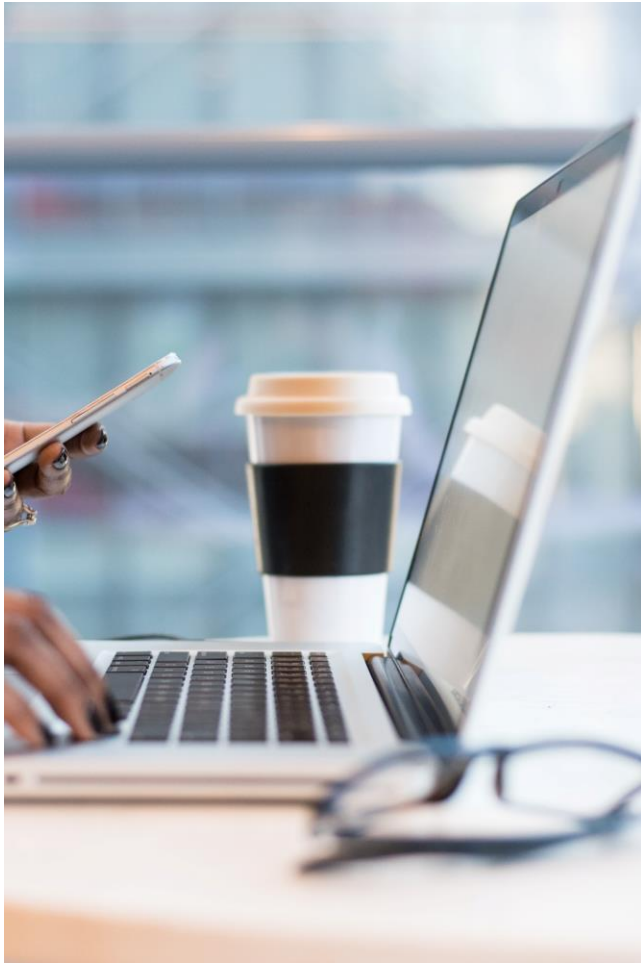


Ipsos Oct'21 Australia ~ What can an online business do to make you feel more comfortable to share your information when interacting with them? n=1000

STRONG CORPORATE VALUES AND CONSISTENT CONSUMER EXPERIENCES ENGENDER TRUST



Ipsos Oct'21 Australia Thinking about companies that you have a high level of trust in providing your personal information, what is it about those companies that makes you trust them with your data? n=1000



I am OK with my data being used especially when you have signed up for something and you know the company

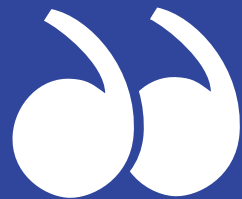


DATA MONITORING

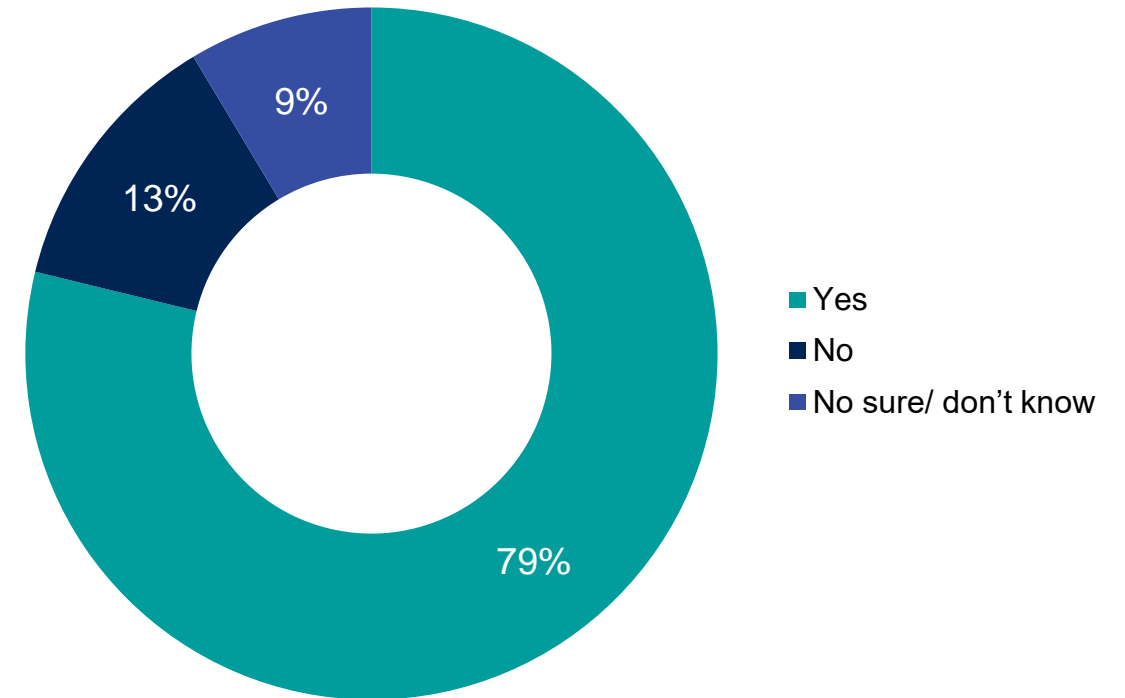




This is now the accepted norm, but can be annoying and at times scary



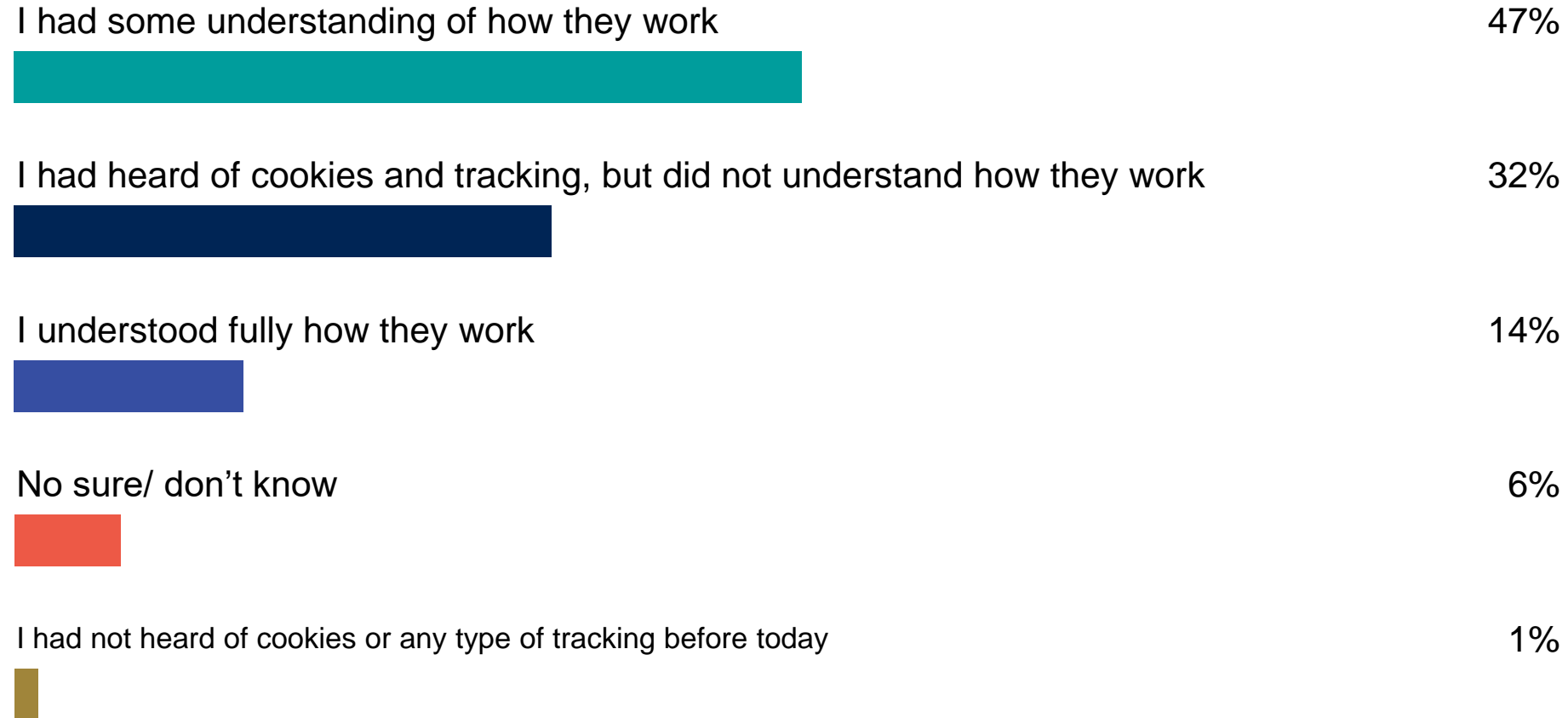
8 IN 10 USERS ARE AWARE THEY ARE BEING TRACKED WHEN THEY ARE ONLINE



Ipsos Oct'21 Australia ~ Are you aware that the websites and apps you visit use mechanisms (such as cookies and identifiers) to track your usage and activities? n=1000

MOST USERS HAVE SOME UNDERSTANDING OF 'COOKIES'

“Digital crumbs which are left behind to track you”



Ipsos Oct'21 Australia ~ Thinking about data protection and privacy, to what extent do you agree or disagree with the following statements? n=1000

ACCEPTANCE IS BASED ON CAREFUL CONSIDERATION

6 in 10 cautiously evaluate their choice

I only accept those from sites/ brands online which I know and trust 36%



I think about it carefully before accepting them 27%



I automatically accept them, it's part of using the internet 23%



I never accept these and leave all pages where they come up 10%

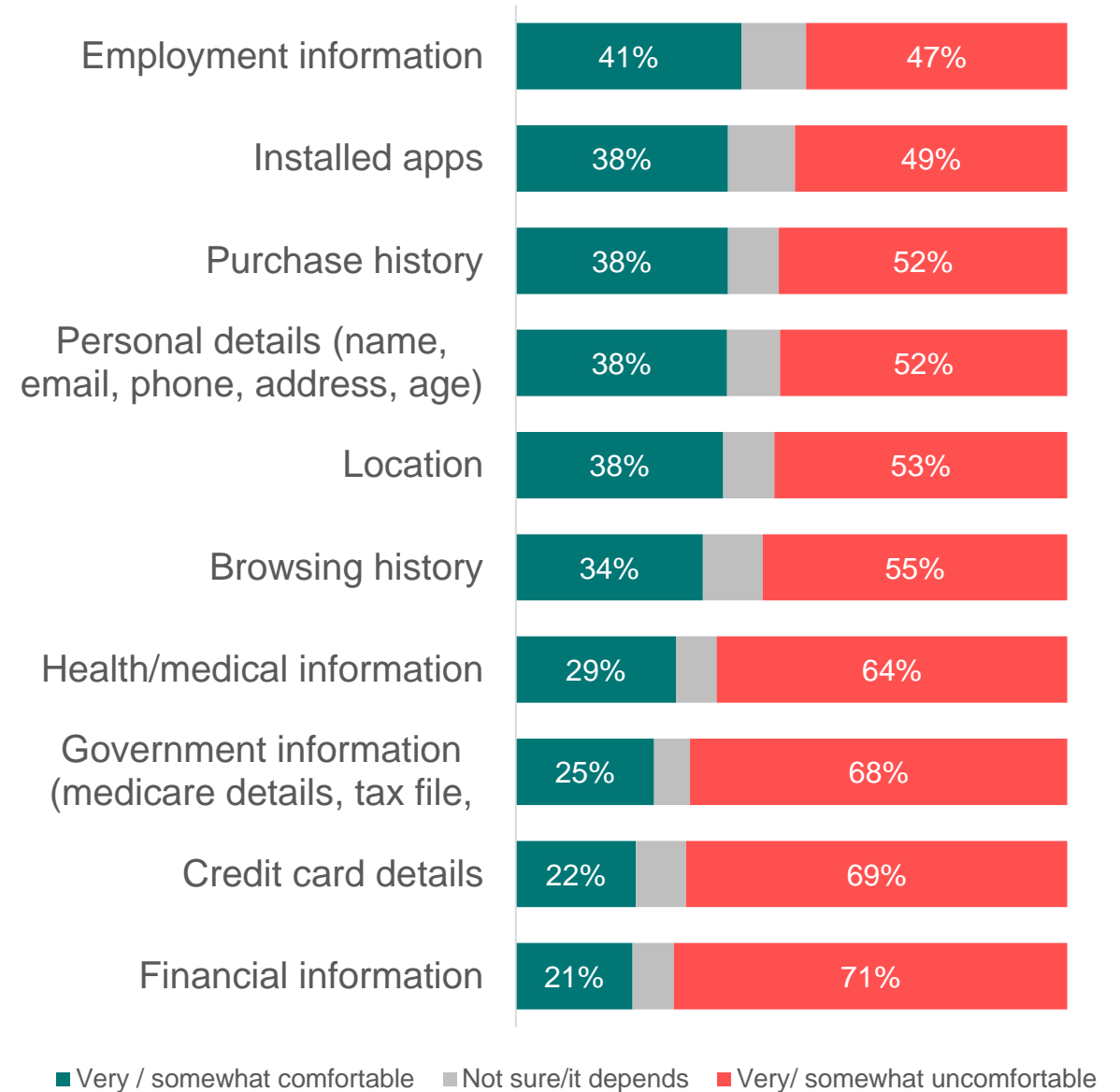


I actively install blockers to ensure I never get tracked online 5%



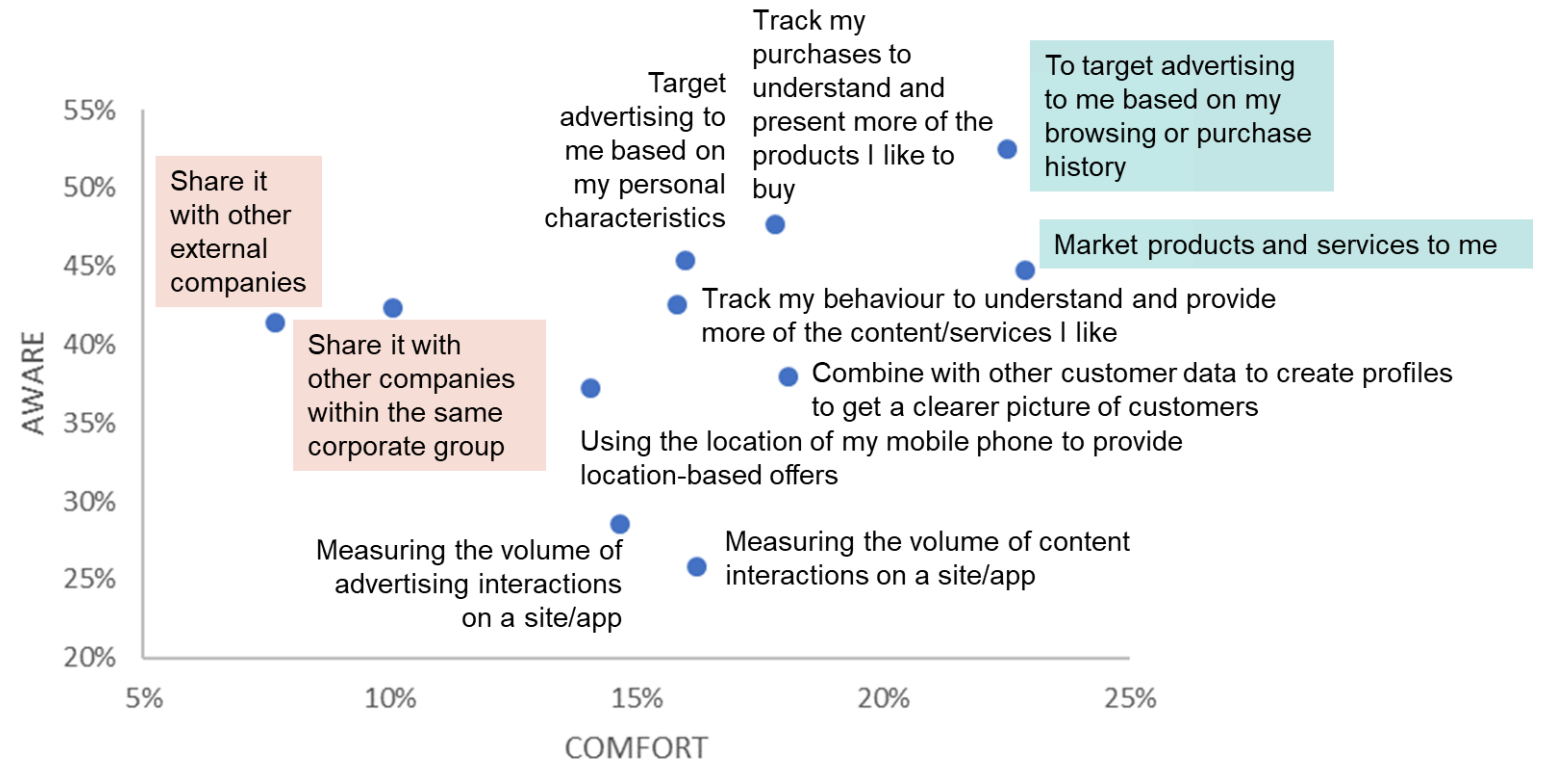
Ipsos Oct'21 Australia ~ Which of the following statements best describes what do you do when you see pop-up messages on websites and apps about that content provider using cookies or other tracking techniques, and requesting consent to track your activity? n=1000

The provision of financial, health and 'government' based data considered the most sensitive.



SHARING OF DATA HOLDS THE LEAST LEVEL OF COMFORT FOR USERS

When we examine what people are **aware** of compared to what they are **comfortable** with in terms of data collection, tracking and targeting usage with a view to an enhanced offering is more appealing than sharing of data.

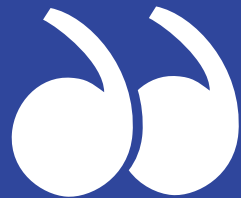




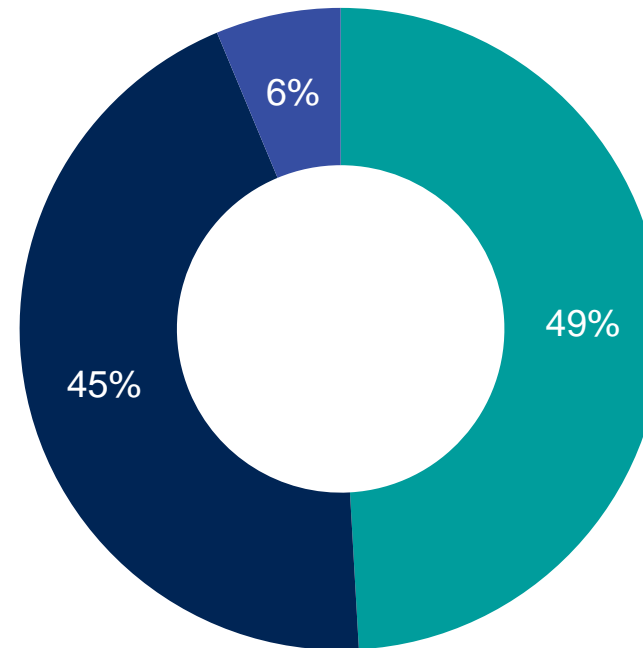
VALUE EXCHANGE



I guess you cannot expect something for nothing



HALF OF ALL USERS FEEL THEY ARE GETTING GOOD VALUE FROM THEIR ONLINE INTERACTIONS



- I don't receive enough value compared to the value of my personal data
- I receive fair compensation for the value of my data
- I receive more value from the company than what I think my data is worth

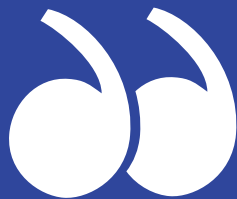
*Ipsos Oct'21 Australia ~ Which of the following statements best describes the value you receive in accessing free content and services online (name, contact information, browsing history, etc.)?
n=1000.*



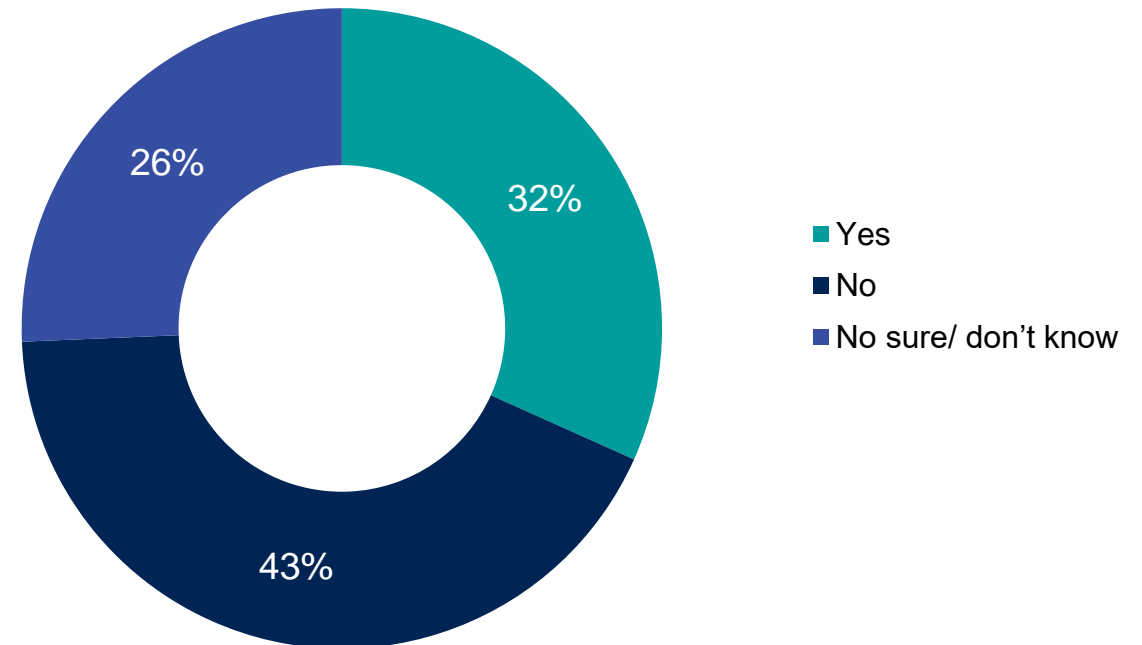
I assume they are paid per visit as people visit websites?

I don't really know...

Through ads on their sites?



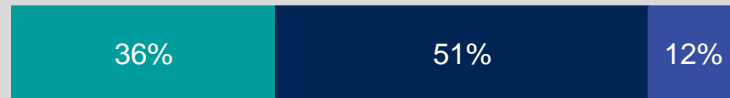
7 IN 10 USERS ARE UNAWARE OF HOW ONLINE CONTENT PROVIDERS ARE MAKING MONEY



Ipsos Oct'21 Australia ~ Do you know how companies providing online content and services in the apps or websites you use make their money to keep going? n=1000,

ADVERTISING IS THE MOST SUPPORTED MODEL FOR COMMERCIAL ACTIVITIES

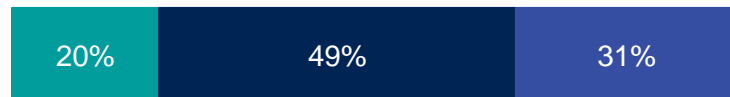
From advertising where access to online content and services remains free to consumers



From subscription fees or where consumers pay to access online content and services without advertising



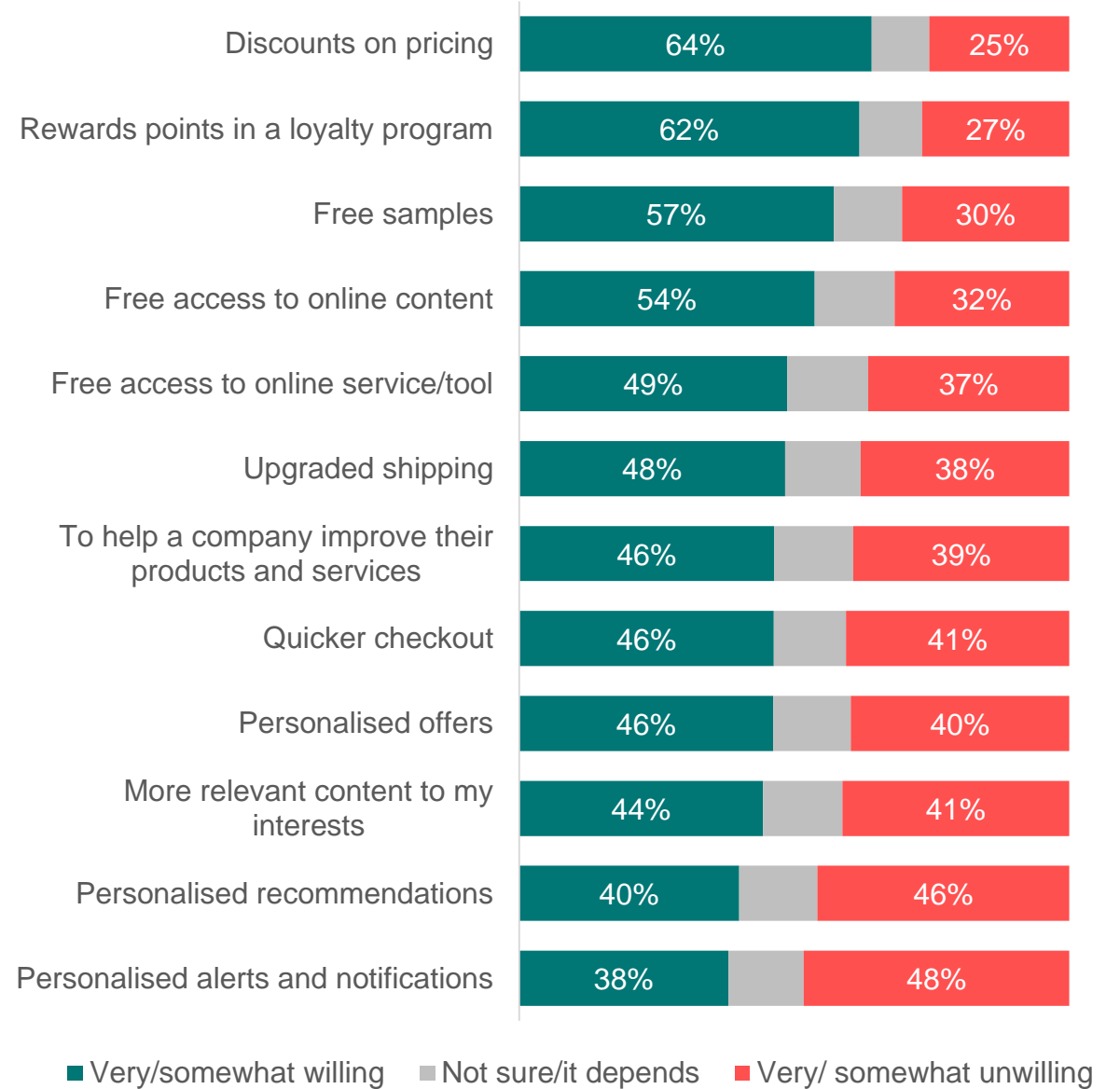
From a mix of subscription fees and advertising where consumers pay to access online content and services where there is advertising



■ Fully supportive ■ Somewhat supportive ■ Not supportive

Ipsos Oct'21 Australia ~ How much do you support online content and service providers making money to keep going in the following ways? n=1000

Discounts, rewards and free products & services are a valuable trade for personal data



Ipsos Oct'21 Australia ~ How willing would you be to share some personal information with an online content service provider or online retailer, in exchange for each of the following? n=1000



IMPLICATIONS

1. Empowerment

The findings reinforced the consumer desire to be empowered when traversing the digital landscape, being given the means to find control and make choices about the collection of their data and how its used online.

2. Education

Stakeholders across the industry can benefit from educating and clearly communicating to consumers the value of content and the role advertising can play in contributing to the continued access to free digital content and services they regularly use.

3. Transparency

Businesses have a role to play in the increased transparency of practises related to the sharing of data with third-parties and in communicating the value to consumers in doing so.

4. Brand Value

Sound corporate values and consistent customer experience are strong trust drivers underpinning the data exchange experience.

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GAME CHANGERS

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