



The Privacy Paradox Reloaded: Changes in Consumer Behavior and Attitudes since 2018

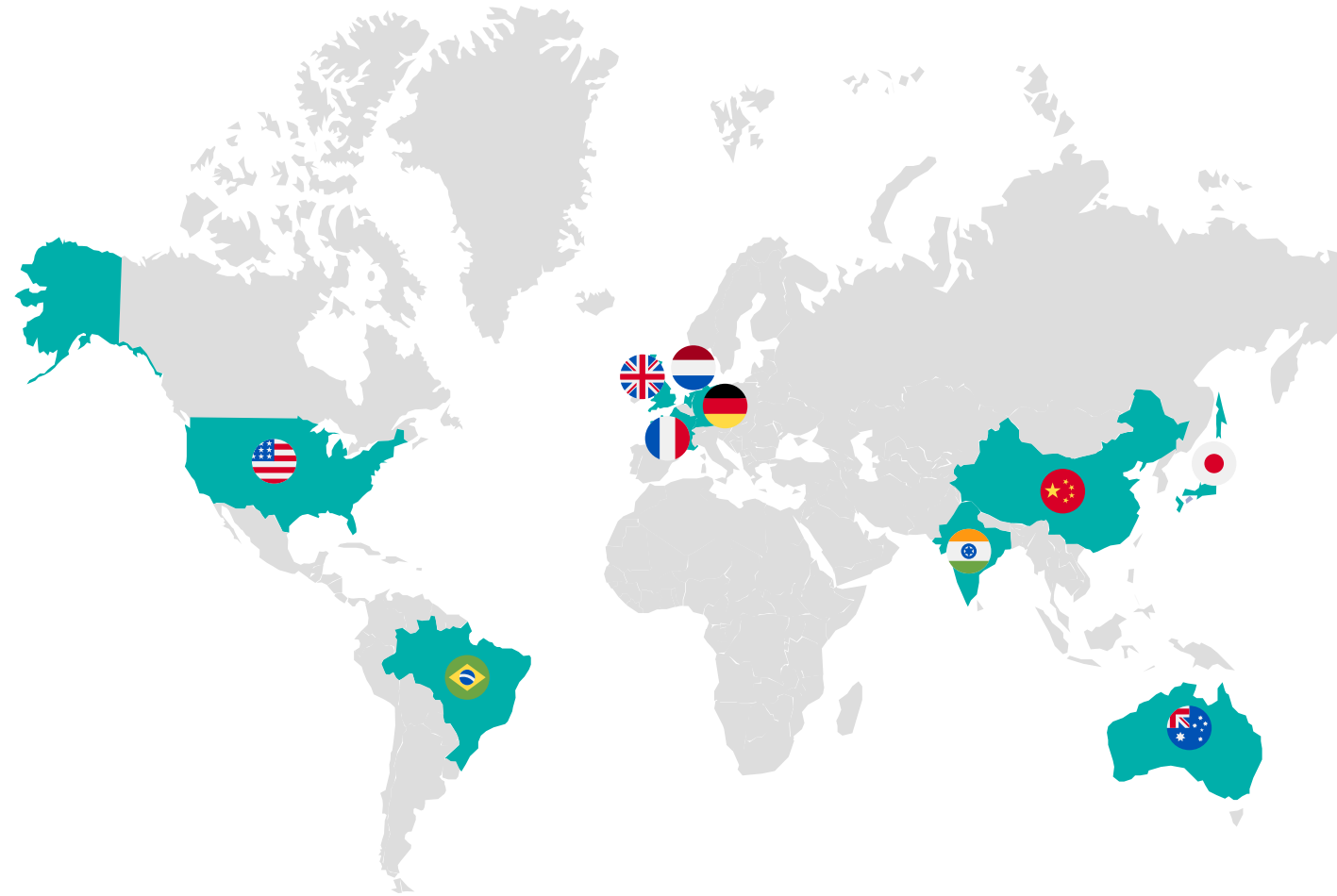
HERE Market Intelligence
August 2019



10,176 respondents to online survey on data privacy in 10 countries

Shining the light on data privacy



Privacy is an essential consideration for businesses worldwide, especially with recent highly publicized data breaches, the implementation of GDPR in the EU and regulations such as CCPA (California Consumer Privacy Act) in California increased consumer scrutiny on how companies process and use personal data. As consumer awareness about personal data collection and processing grows, privacy protection has become an important differentiator for businesses looking to attract and retain their customers. Consumers experience the consequences of data use and misuse most directly. Companies can demonstrate their accountability to consumers by understanding the attitudes, motivations and behaviors that lead people to share their personal and location data. This study, an update on research conducted by HERE Technologies in 2018, explores data privacy from the consumer perspective.





Methodology

- The online survey was a quantitative measurement of behaviors and attitudes toward data privacy.
- Key questions were based on a similar 2018 questionnaire.
- All participants owned smartphones or tablets, the main devices through which location data is shared.
- We ensured survey respondents represented the market (age, gender, geographic regions and education levels).

	2018	2019
Sample Size	8,073 Consumers	10,176 Consumers
Markets	8 Markets: 	10 Markets: 

HERE Technologies conducted this survey in collaboration with **ESOMAR**, with support from **BuzzBack** and **Cint**.

Executive Summary (1/2)

The data-sharing paradox: everyone shares data despite mixed feelings about sharing it.

Consumers share their location data **more frequently** than in 2018, especially in Brazil.

However, most respondents (three out of five) report that they have experienced misuse of their data within the past two or three years. This ranges from email spam to phishing to hacked bank accounts/credit cards.

Concerns about sharing personal information digitally remain high, and consumers are conflicted about sharing location data.

Despite concerns, consumers are more willing to share or trade their data for something in return, such as enhanced security or a financial reward,

acknowledging that offering benefits will increase consumers' likelihood to share data.

Trust in the data controller and processor and transparency in how data is used: the keys to data sharing.

Trust continues to be an important factor in consumers' willingness to share their personal and location data. Trust in governments and regulations to prevent misuse of data remains low.

Familiarity with the data collector and the industry in which the data collector operates also affect willingness to share data.

Half of respondents believe they are in control of their data, and half feel they have little or no control. Tech-savvy respondents were more

likely to feel in control of their data. This control is reflected in being able to set preferences, change permissions and withdraw location information from apps/services.

Executive Summary (2/2)



Behavior changes since 2018 illustrate how and with whom consumers share their data

Consumers in 2019 share location data more frequently than they did in 2018. Now, they are more willing to share with certain industries.


Consumers are most willing to share location information with data collectors in the mobility industry:

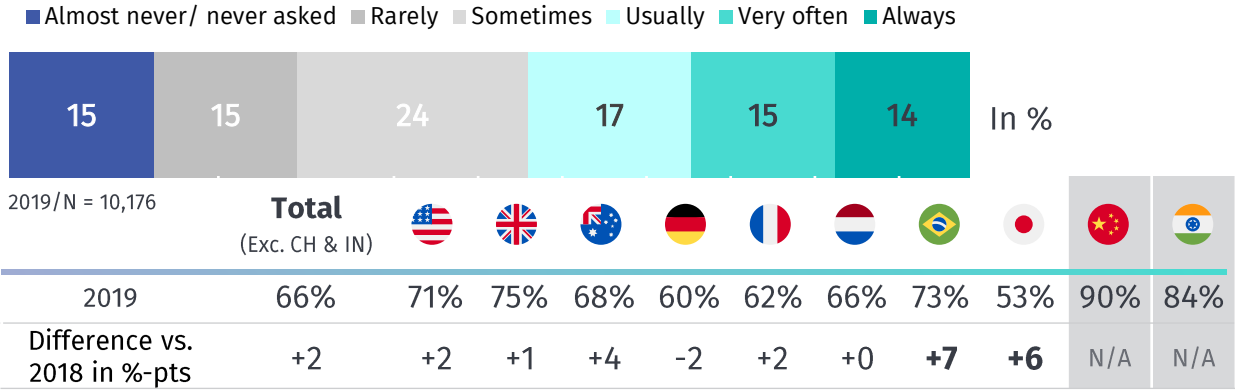
- Public transport and ride-hailing services experienced the greatest increase in consumers' willingness to share data from the 2018 study, reflecting growth in the mobility market.
- There was also a greater willingness to share data with car manufacturers, likely the result of growth in connected car services.

**Sharing location data in 2019:
how attitudes about digital
privacy have evolved**

Frequency of sharing location data has increased since 2018

Consumers’ willingness to share their location data has increased in all countries except Germany. Brazil stands out in particular, with an increase of seven percentage points.


Willingness to share
your location data



95% significant differences indicated in **bold**

70%

agreeing

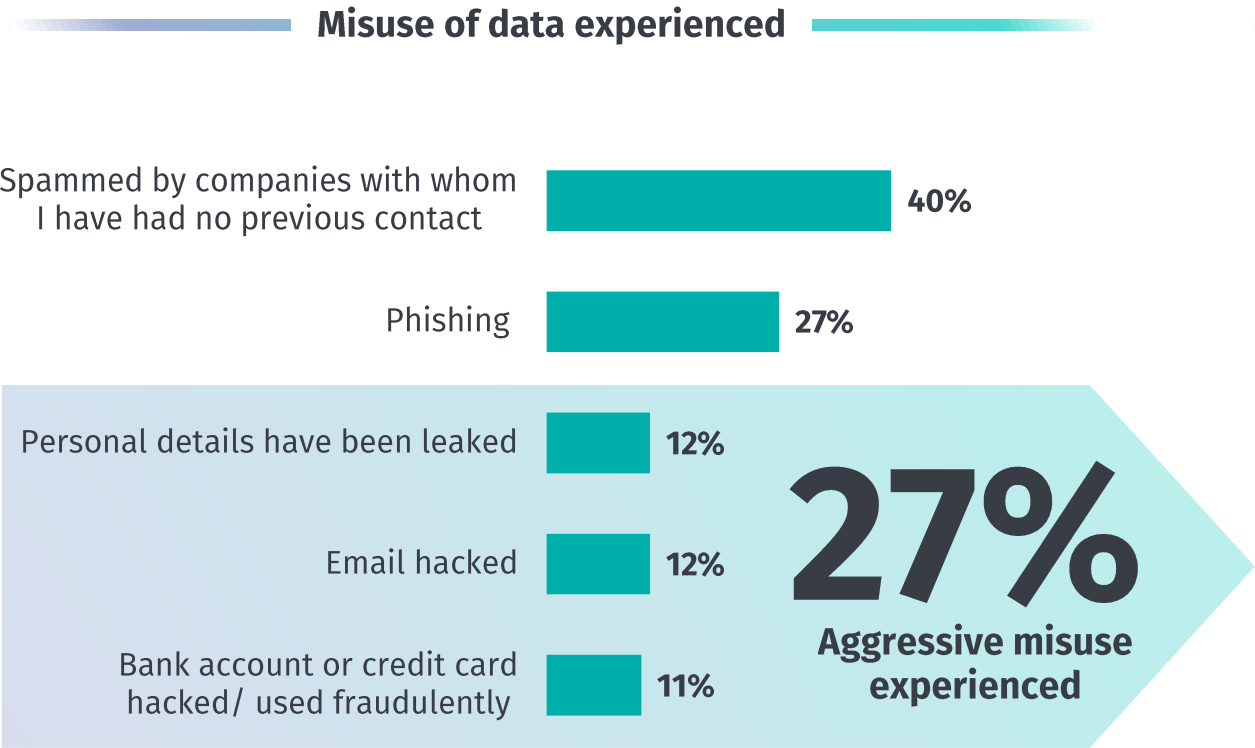
sometimes/usually/very often/always
(4 to 7 on a 7-point scale)

Q3: “Below are some statements that other people have made about their **attitudes toward privacy of digital information**. Please indicate how much you agree or disagree with each statement using the following scale.”



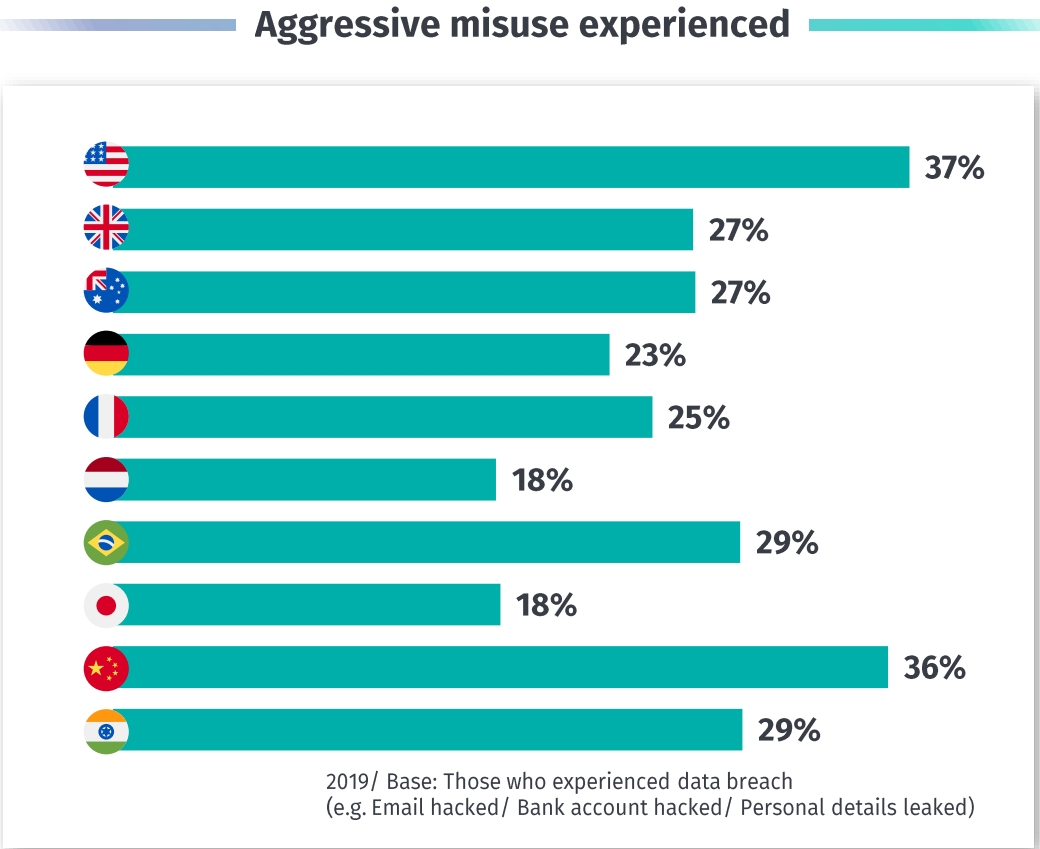
Most consumers have experienced data misuse in the recent years

Over a quarter (27 per cent) of respondents have experienced a significant form of data misuse (e.g. email or bank account hacking, leakage of personal details). Overall, consumers living in GDPR countries have experienced fewer data breaches in the past few years.



2019/ N = 10,176

Q27: "Have you experienced any of the following in the last 2 to 3 years?"



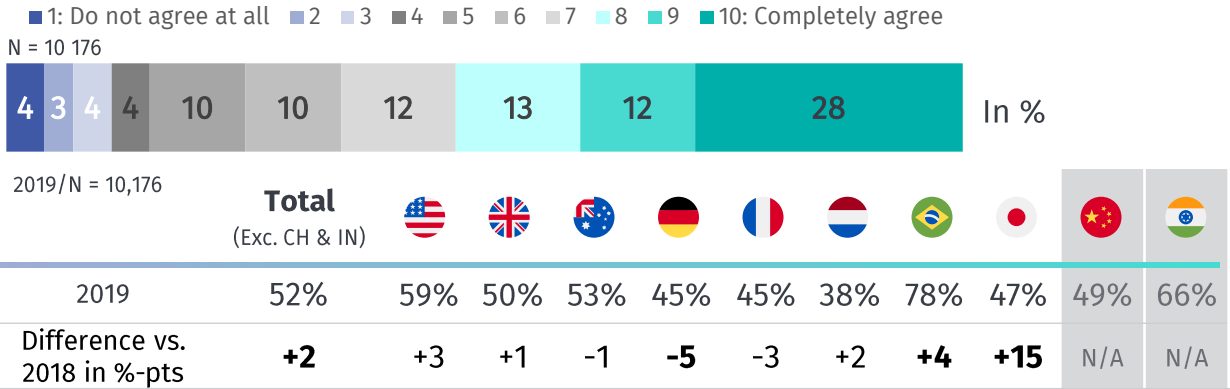
Consumers continue to be concerned about digital data sharing

Concern about sharing personal information digitally is high. Consumers also continue to dislike the privacy practices of most data collectors.



”

I am concerned about sharing my personal information digitally

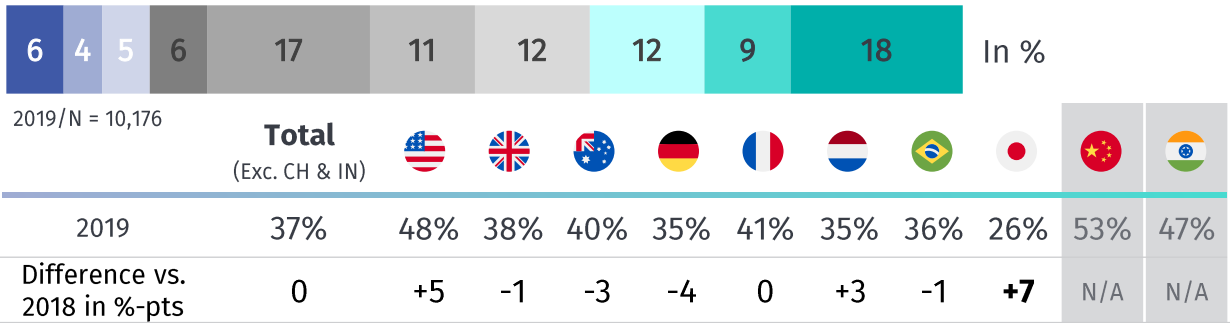


53%
agreeing
(8 to 10 on 10-point scale)



”

I do not like the current privacy practices of most data collectors



39%
agreeing
(8 to 10 on 10-point scale)

95% significant differences indicated in **bold**

Q3: “Below are some statements that other people have made about their attitudes toward privacy of digital information. Please indicate how much you agree or disagree with each statement using the following scale.”



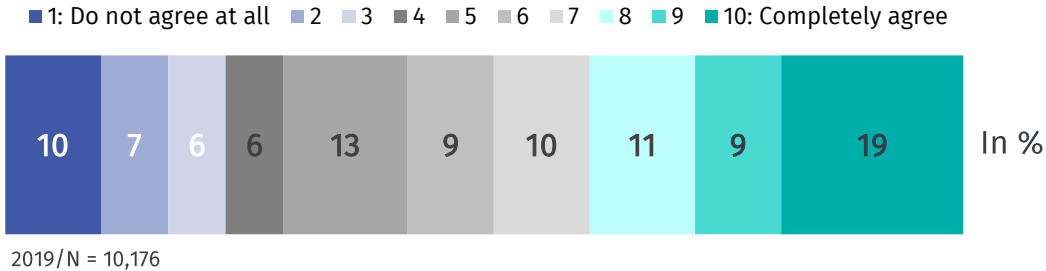
Sharing location data provokes mixed feelings

Sharing location data continues to make consumers feel vulnerable and nervous, due to concerns about potential burglaries or stalkers. This shows that protecting consumer location data should remain a priority for regulators and businesses.



”

I am nervous about burglaries, stalkers or digital/physical harm when sharing my location data.



+1
Difference
vs. 2018 in %-pts
(markets exc.
CH & IN)

38%
agreeing
(8 to 10 on 10-point scale)



”

Sharing my location data makes me feel vulnerable or stressed.



0

32%
agreeing
(8 to 10 on 10-point scale)

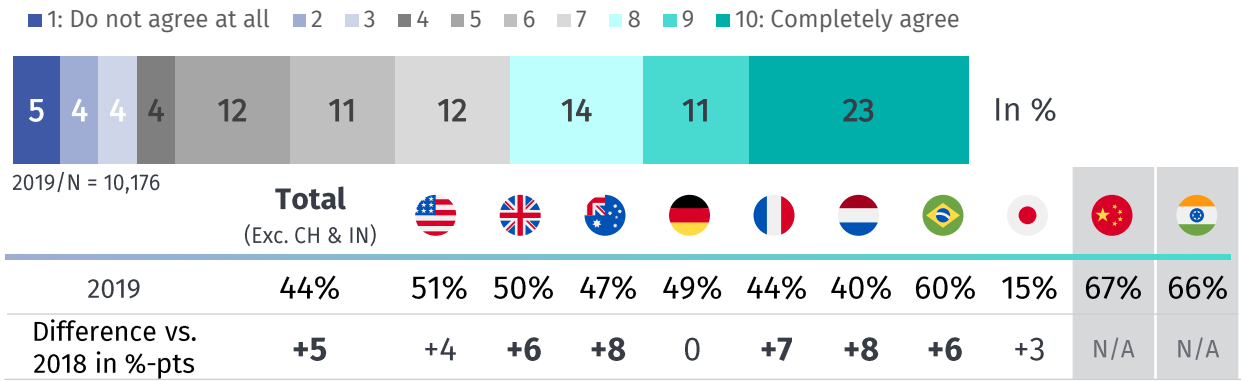
Q7: “Thinking about your attitudes around sharing your location data, please tell us how much you agree or disagree with the following statements.”



Consumers realize the value of their personal information

Although consumers may feel vulnerable and nervous about sharing their location data, they also clearly understand that their personal information has value. This awareness has increased since 2018. Data collectors need to respond accordingly.

” My personal information is valuable for many different data collectors



95% significant differences indicated in **bold**

48% agreeing
(8 to 10 on 10-point scale)

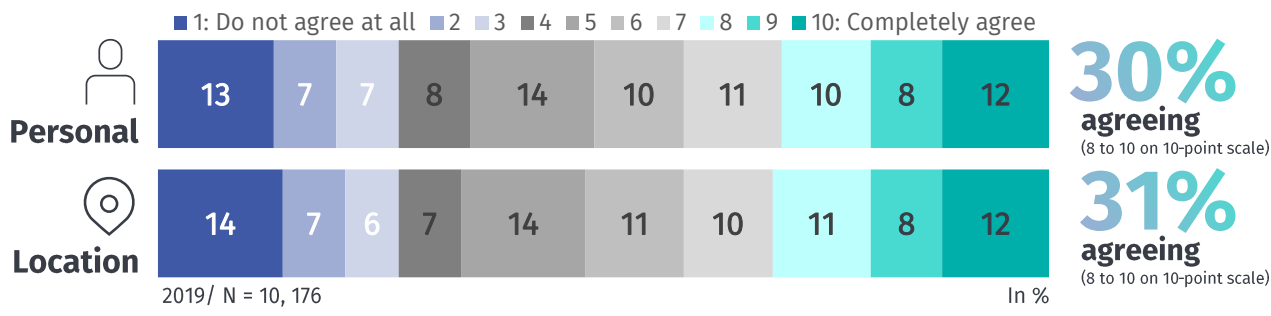
Q3: “Below are some statements that other people have made about their attitudes toward privacy of digital information. Please indicate how much you agree or disagree with each statement using the following scale.”



Consumers won't share their data for free – it's time for data collectors to act!


Consumers are willing to share or trade their data for something in return. Tech-savvy consumers in particular realize their data's worth.

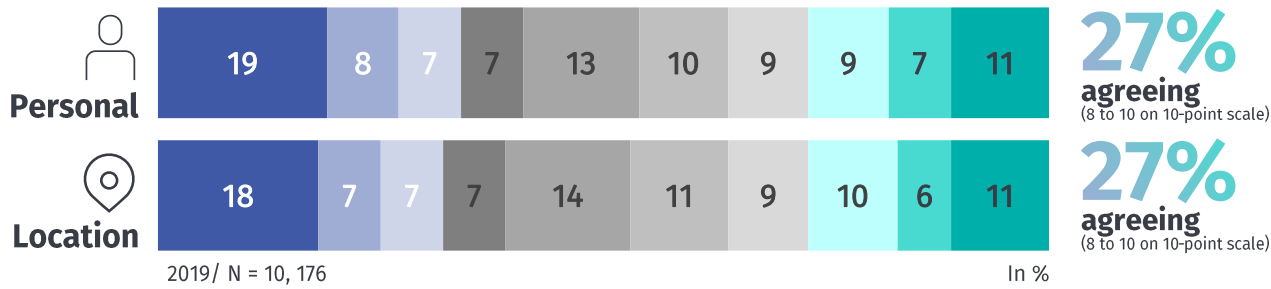

I am happy to share my data if there is something of value in it for me.



Displaying level of agreement
(8-10 on a 10-point scale)

	Tech-savvy 2019/ N = 6116	Non-tech-savvy 2019/ N = 4060
General		
Personal Data	42%	12%
Location	44%	13%


I want to trade my data and get a lot more in return than today.



	Tech-savvy 2019/ N = 6116	Non-tech-savvy 2019/ N = 4060
General		
Personal Data	38%	12%
Location	38%	12%

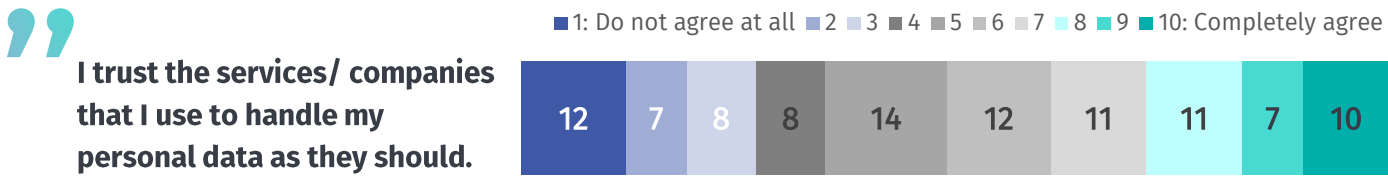
Q7: "Thinking about your attitudes around sharing your location data, please tell us how much you agree or disagree with the following statements."
Q26: "Thinking about your attitudes around sharing your general personal data, please tell us how much you agree or disagree with the following statements."



Trust in data collectors and its impact on data sharing

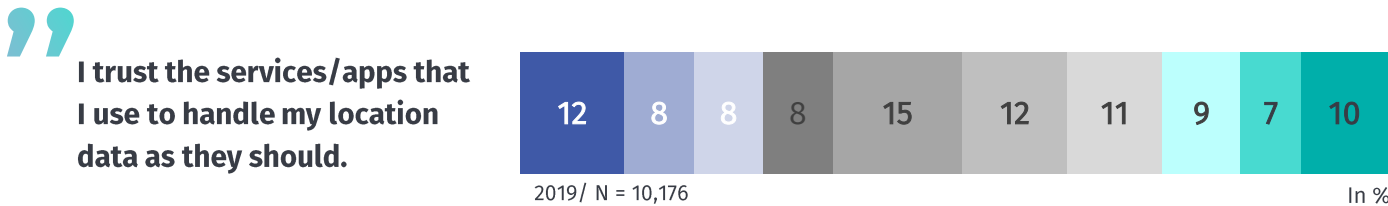
Consumers are skeptical about sharing data

Trust in companies to responsibly handle personal and location data is not especially strong. More than a quarter of consumers do not trust companies or regulations to prevent misuse.



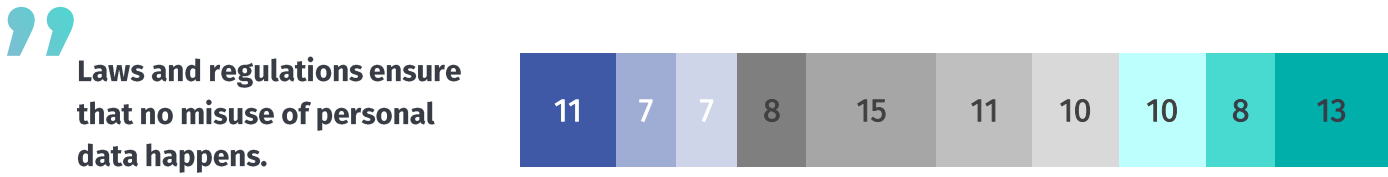
27% agreeing
(8 to 10 on 10-point scale)

Tech-savvy	Non-tech-savvy	Experienced aggressive data misuse	No data misuse
2019/N = 6116	2019/N = 4060	2019/N = 2750	2019/N = 4143
42%	12%	31%	29%



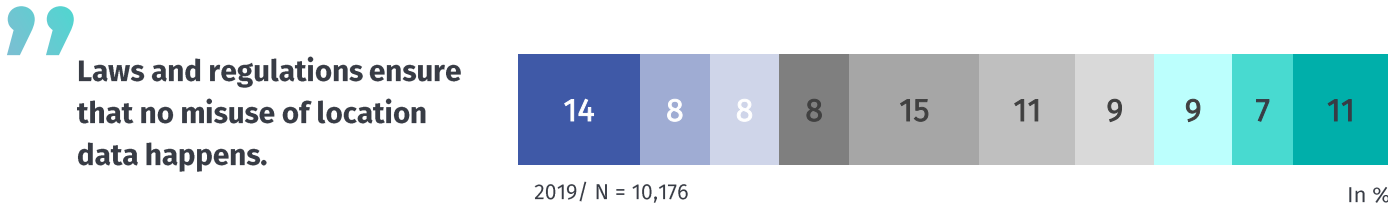
26% agreeing
(8 to 10 on 10-point scale)

38%	10%	31%	28%
-----	-----	-----	-----



31% agreeing
(8 to 10 on 10-point scale)

41%	14%	33%	32%
-----	-----	-----	-----



27% agreeing
(8 to 10 on 10-point scale)

38%	10%	31%	29%
-----	-----	-----	-----

Q7: "Thinking about your attitudes around sharing your location data, please tell us how much you agree or disagree with the following statements."
Q26: "Thinking about your attitudes around sharing your general personal data, please tell us how much you agree or disagree with the following statements."



A good reputation is key to consumers' willingness to share data

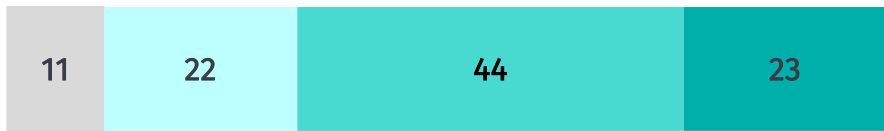
Being a trusted and reputable data collector is key in fostering willingness to share both personal and location data, especially for tech-savvy consumers.



”

The data collector accessing my personal data is trusted and reputable.

Not at all likely Not very likely Likely Very likely



67%

Likely/very likely

Tech-savvy	Non-tech-savvy	Experienced aggressive data misuse	No data misuse
2019/ N = 6116	2019/ N = 4060	2019/ N = 2750	2019/ N = 4143

Tech-savvy	Non-tech-savvy	Experienced aggressive data misuse	No data misuse
76%	53%	70%	64%



”

The brand of data collector accessing my location data had a good reputation.



2019/ N = 10,176

In %

64%

Likely/very likely

Tech-savvy	Non-tech-savvy	Experienced aggressive data misuse	No data misuse
75%	48%	68%	62%

Q11: “Thinking about the different **data collectors** asking you to share your location data with them, how much does the **brand** of the data collector affect **your willingness to share your location data?**”
Q25: “Thinking about the different **brands** asking you to share your **General Personal Data** with them, how much does the **brand** of the data collector affect **your willingness to share your personal data?**”



Consumers won't share their data with just anyone

Familiarity with a data collector and the industry in which the data collector operates affect consumers' willingness to share data.

60% | of consumers globally are very likely/
likely to share their **location data** if
the data collector was well known

Tech-savvy consumers are more likely to share than non-tech-savvy consumers (70% vs. 43%)

60% | of consumers globally are very likely/
likely to share their **general data** if
the data collector was well known

Tech-savvy consumers are more likely to share than non-tech-savvy consumers (70% vs. 45%)

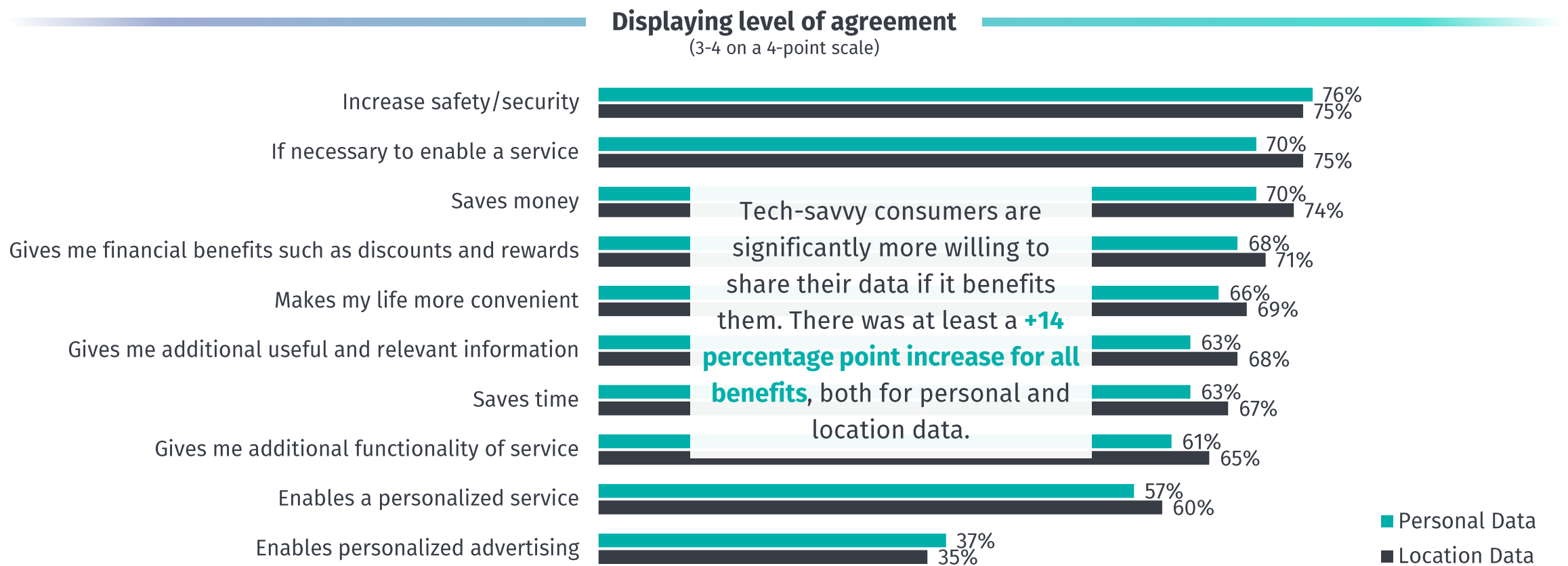
79% | of consumers globally are very likely/
likely to share their location data with
navigation or mapping services/apps

Q11: "Thinking about the different **data collectors** asking you to share your location data with them, how much does the **brand** of the data collector affect **your willingness to share your location data**?"
Q25: "Thinking about the different **brands** asking you to share your **General Personal Data** with them, how much does the **brand** of the data collector affect **your willingness to share your personal data**?"

2019/N = 10,176

Clear benefits positively affect willingness to share data

Overall, consumers are more willing to share their data if they see a clear benefit, especially enhanced safety and security.



Q8: "Thinking about the different **benefits** you could get from sharing your location data how much does each of these benefits affect **your willingness to share your location data?**"
Q24: "Thinking about the different **benefits** you could get from sharing your general personal data, how much does each of these benefits affect **your willingness to share it?**"

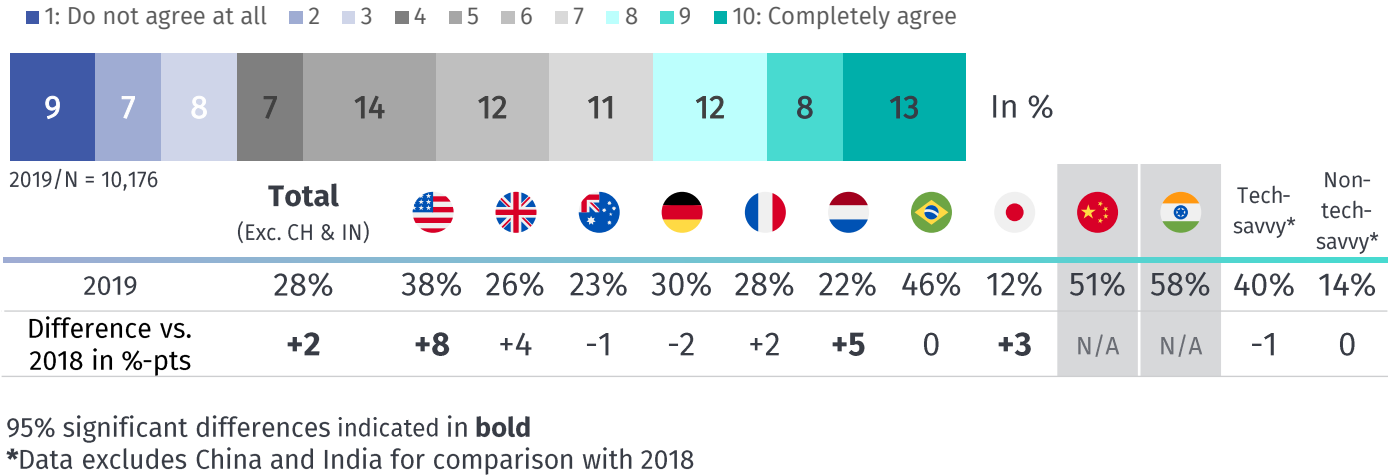


**How transparency and
control affect data sharing**

Tech-savviness correlates with understanding of how data is used

Non-tech-savvy consumers lack understanding and awareness of what happens to data they share with a data collector. This points to a clear need for businesses to help educate this more vulnerable group of consumers.

” I am aware what happens with my personal information after I shared it with a data collector.



33% agreeing
(8 to 10 on 10 point scale)

Q3: “Below are some statements that other people have made about their attitudes toward privacy of digital information. Please indicate how much you agree or disagree with each statement using the following scale.”



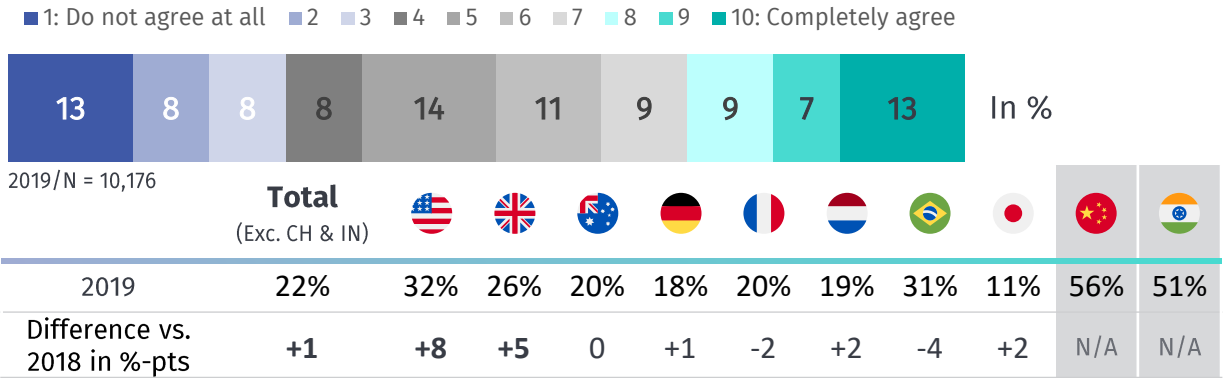
Consumers need to feel in control of sharing location data.

Therefore, special attention needs to be paid to the subgroups who don't feel as in control: in particular, Japanese and non-tech-savvy consumers.



”

I have full control over my location data.



95% significant differences indicated in **bold**

29% agreeing
(8 to 10 on 10 point scale)

Displaying level of agreement (8-10 on a 10-point scale)

39% | Tech-savvy
N = 6116

13% | Non-tech-savvy
N = 4060

Q7: “Thinking about your attitudes around sharing your location data, please tell us how much you agree or disagree with the following statements.”



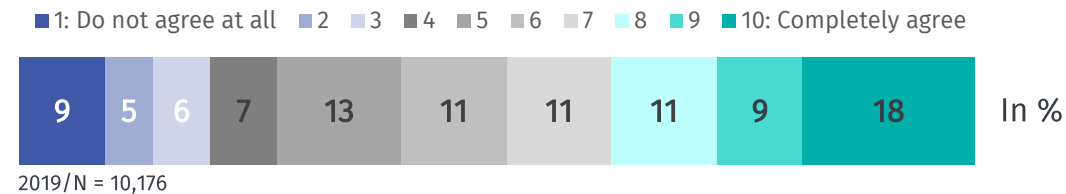
Transparency and control are key when updating apps and services

Consumers feel a lack of control about sharing their data when they don't receive update notifications for services/apps. This feeling is especially strong among tech-savvy consumers, clearly signaling the need for businesses to strengthen their level of transparency.



”

I feel out of control when services/apps change my settings during updates and I don't get notified.



38%
agreeing
(8 to 10 on 10-point scale)

Displaying level of agreement (4-10 on a 10-point scale)

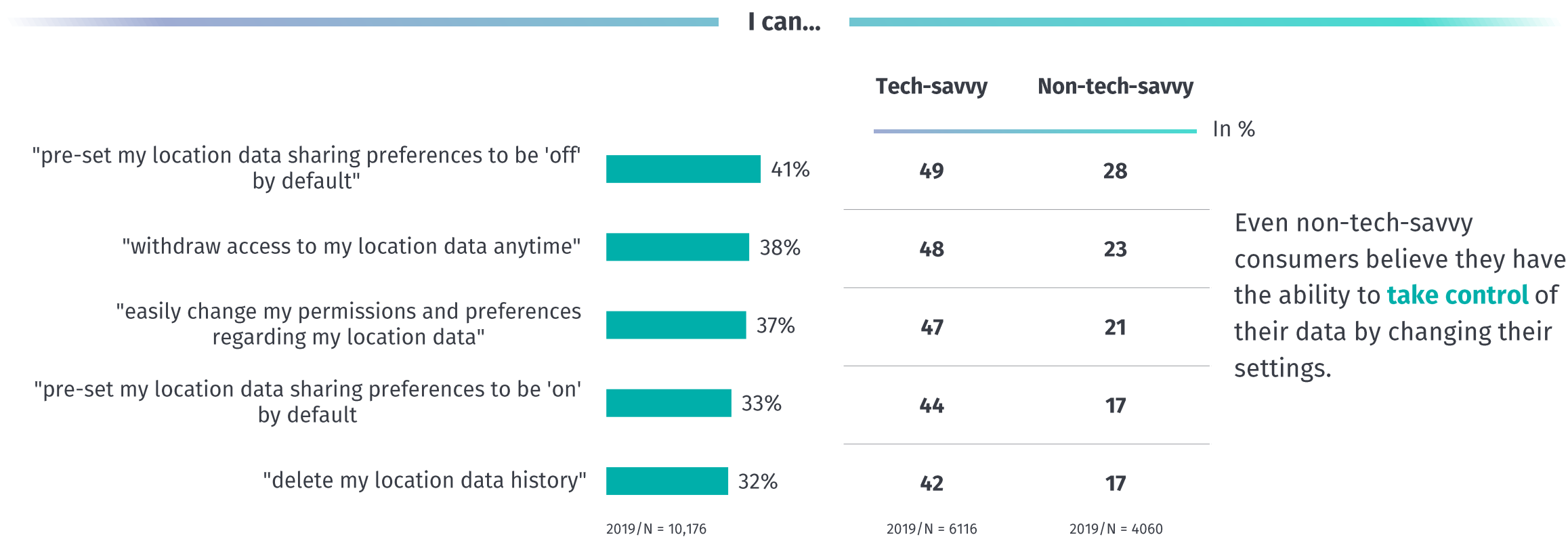
45% | Tech-savvy
N = 6116

27% | Non-tech-savvy
N = 4060

Q7: "Thinking about your **attitudes around sharing your location data**, please tell us how much you agree or disagree with the following statements."

Consumers control data sharing by disabling location on their mobile devices

Most consumers believe they can take control of their data by changing their settings.



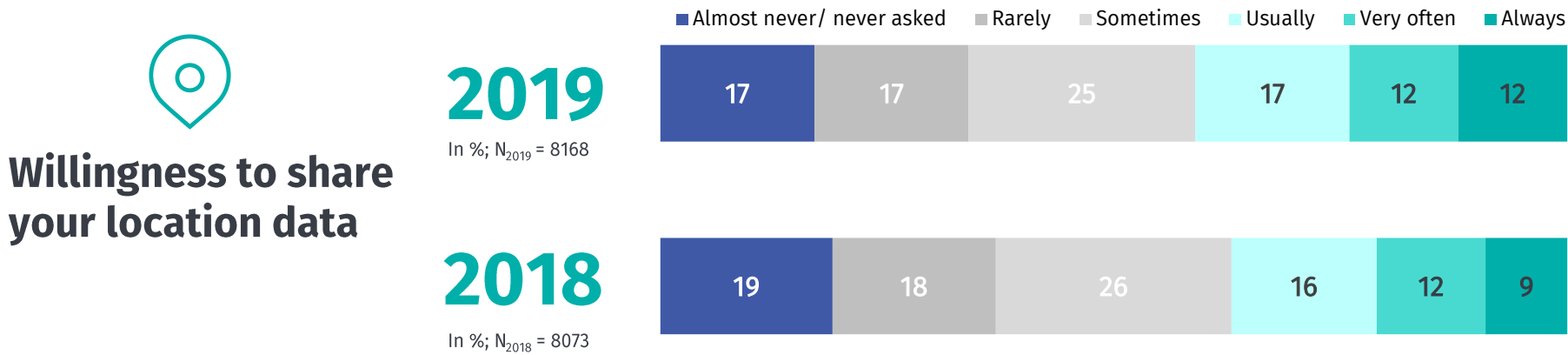
Q6. "Thinking about the situations where you share your **location data**, please tell us **how much control** you have by selecting an answer for each of these statements."



Changing consumer behaviors

Data-sharing frequency has increased since 2018 ...

In the eight countries surveyed in both 2018 and 2019, overall willingness to share location data has increased by two percentage points.



			Willing to share sometimes – always (4-7 on a 7-pt scale)			Likely to share if “I knew what my location data is used for” (3-4 on a 4-pt scale)
			Total	Urban	Rural & suburban	
2019	N ₂₀₁₉ = 8168		66%	69%	63%	68%
Difference vs. 2018 in %-pts		N ₂₀₁₈ = 8073	+2	+3	+1	+2

Q4. “Now we would like to talk about situations when a **data collector** asks you to share your location data. Which of the following best describes **your overall willingness to share your location data?**”
Q12: “... How much does each of these factors affect **your willingness to share your location data?** Item “I knew what my location data is used for”



... reflecting the growing need to share data with mobility services

Consumers' increased willingness to share location data is most strongly reflected in the mobility industry, e.g. public transportation, ride-hailing services, taxis and navigation and mapping apps/services.

“How much does the **industry** of the data collector affect **your willingness to share your location data?**”

Top 10 Industries

		Difference vs. 2018 in %-pts
Navigation/maps	76%	+4%
Weather forecast	69%	+0%
Public transport	53%	+8%
Government bodies	53%	+3%
Ride hailing	51%	+10%
Banking	51%	+6%
Telecommunications	50%	+5%
Taxis	49%	+6%
Online retailers	49%	+3%
Market research	New in 2019 44%	n/a

Bottom 10 Industries

		Difference vs. 2018 in %-pts
Store retailers	38%	+4%
Car manufacturers	37%	+7%
Radio apps	37%	+3%
News and sports	36%	+2%
Property/real estate	36%	+5%
Bike Sharing	34%	+4%
Video sharing	34%	+2%
Games	34%	+2%
Dating apps	30%	+5%
Gambling/lottery	23%	+4%

Q9: “Thinking about the different **data collectors** asking you to share your location data with them, how much does the **industry** of the data collector affect **your willingness to share your location data?**”

2018 / N = 8,073
2019 / N = 8,168

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