

# GLOBAL DATA PRIVACY: WHAT THE CONSUMER REALLY THINKS 2022

Research partner



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# INTRODUCTION

On behalf of the entire [Global Data and Marketing Alliance](#) (GDMA), which represents and unites 28 data-driven marketing associations from around the globe, welcome to the second 'Global Data Privacy: What the Consumer Really Thinks' report.

The first global edition of this research was undertaken in 2018 covering 10 countries on four continents (Argentina, Australia, Canada, France, Germany, the Netherlands, Singapore, Spain, the UK and the USA). This 2022 edition has been expanded to 16 countries representing over half the world's population with the addition of Belgium, Brazil, China, India, Japan and Mexico.

Given the diversity of cultures, economic development and market maturity of digital transformation, this report is remarkable for the consistency of its findings across the 16 countries, although of course some differences do exist. Critically, consumers increasingly understand the part data has to play in the data value exchange.

This research confirms the importance of the [GDMA's Global Privacy Principles](#) launched in 2021. The global principles are designed to enable a consistent approach to data protection legislation and industry best practice across the world.

The guiding principle of valuing privacy engenders trust at the heart of customer communication. In all 16 global markets, trust in an organisation is the most important factor in people's willingness to share their personal information – this is also true across all age groups. Customers also continue to seek greater transparency and control when sharing personal information.

Backed by these strong findings, the GDMA Global Privacy Principles are an aspirational commitment for organisations, governments and people. They enable a trusted and successful commercial ecosystem that matches the customer's desire for greater transparency, control and respect for privacy in the modern data ecosystem.

## **Martin Nitsche**

Chair, GDMA  
President, DDV

# FOREWORD

The digital revolution has dramatically enhanced peoples' ability to enjoy their Human Rights, as defined by the United Nations. For example, Article 19 of the UN's Universal Declaration of Human Rights states that 'everyone has the right to freedom of opinion.' Surely no one can deny it is far easier to express ourselves in the digital age, and that's not the only one.

Article 20 protects our freedom to association, the right for people to join with like-minded folk without geographical boundaries. Article 24 protects our right to rest and leisure while Article 26, our right to education. Few would claim that the data and technology of the digital revolution hasn't transformed their ability to connect with people, enjoy digital content and expand our minds.

Not forgetting Article 23 which protects peoples' right to work. The still burgeoning digital economy fundamentally supports that. The UK Government alone says the digital economy adds over £400 million per day to the UK economy, and that it's a sector growing six times faster than the average. In the U.S., the commercial internet is responsible for over 7 million jobs.

There can be little doubt – the digital age has brought us huge benefits, but there are challenges.

We know the same digital ease of expressing opinions that we value has also made it possible for some to bring out the worst in people and society. Stories such as hate and harassment, through the misuse of data, at times overwhelm the good news stories of the benefits and connectedness a digital world brings. Of course, while more of us are familiar now with data and technology, for many it is still a complex and poorly understood area, which only serves to create an air of mystery and concern.

This is why this research, now in its fourth iteration (and the second update containing international trend data), is so incredibly important and illuminating. In an age where too many opinions are expressed without evidence, this report is the latest result of a long-term partnership between Acxiom and the GDMA, focused on data truth, the reality of what people really think about data. It is one thing to take a quick poll, it is entirely another to understand trends across 10 years and, more recently, across countries.

Understanding is fundamental, and that is why this research tells us things not normally anticipated. While some media reports would have us believe people are more worried than ever before, the reality is more people are getting familiar with data and technology and in return concern is falling. Not to say we can relax. Indeed, to the contrary, we need more engaged and pragmatic minds around data.

It seems clear the growing generations of people who are used to data are having an effect, but the AdTech industry must continue to find an answer to an axiomatic message that is rooted in this foreword: people still don't see themselves benefiting from data as much as companies do.

While we cannot pretend the digital economy does not provide growth and value to businesses (and let's not forget their employees), it provides far more value to people than they realise. So, while people have less concern than before when it comes to data matters, it matters greatly that we collectively work to understand how people think, so that we may help them have a balanced view of this amazing digital age and how it works for people. This research helps make that possible.

Thank-you again to our wonderful partners at the GDMA and to our independent research partner, Foresight Factory, for helping make this important work possible.

## **Jed Mole**

CMO of IPG agencies Acxiom, Kinesso, and Matterkind

# EXECUTIVE SUMMARY

## **Over The majority of global consumers remain Data Pragmatists**

Over half (53%) of consumers across all 16 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 (29%) of global consumers are Data Unconcerned; people who show little or no concern about their data privacy. Less than 1 in 5 (18%) fall into the Data Fundamentalists segment; people who are unwilling to share personal information. Consequently, in 2022, the vast majority of global consumers (82%) are prepared to engage with the data economy.

## **And the Data Unconcerned are in the ascendency**

Across the 10 global markets covered in the 2018 and 2022 research, there has been a notable increase in the proportional size of the Data Unconcerned vs. the other segments. In 2022, 31% of the population in these markets are Data Unconcerned (up from 26% in 2018). Conversely, 47% are Data Pragmatists (down from 51% in 2018) and 21% are Data Fundamentalists (down from 23% in 2018). While the Data Pragmatists remain the most prevalent, there is a clear trend across global markets towards the growth of the Data Unconcerned over time.

## **Global privacy concerns remain high, but are in notable decline since 2018**

A majority of global consumers indicate a relatively high level of concern with the issue of online privacy, with an average of 71% across the full 16 markets stating a degree of concern. However, across the 10 global markets also surveyed in 2018, there has been a clear decline in overall concern – down from an average of 74% in 2018 to 69% in 2022. Spain and the USA have seen the most significant drop in the level of concern about online privacy, falling from 81% and 82% respectively in 2018 to 68% and 69% in 2022.

## **Global consumers are increasingly comfortable with data sharing and the amount of information shared**

Almost half (49%) of global consumers across all 16 markets feel more comfortable with the notion of data exchange with businesses. Across the 10 trended markets such agreement has grown from 40% in 2018 to 46% in 2022. At the same time, increased numbers in 8 out of the 10 trended markets also claim to be happy with the amount of personal information they share with organisations.

## **A majority of global consumers now see data exchange as essential for the running of modern society**

Over half (53%) of consumers across all 16 markets agree that the exchange of personal information is essential for the smooth running of modern society, reaching a high of 82% in China. In addition, such sentiments have increased notably across the 10 trended markets, rising from 41% agreement in 2018 to 48% in 2022.

## **A consumer capitalist mindset has continued to advance across global markets**

Almost 3 in 4 consumers across all 16 markets agree that their data is their property and that they should be able to trade it if they wish. What's more, 53% of consumers in the 10 trended markets now view their personal information as an asset to negotiate better prices and offers with companies, up from 46% in 2018.

## **Industry is still seen to benefit most from the data economy**

Consumers continue to believe that industry benefits most from data sharing, despite a small shift towards greater value being perceived by them over businesses. On average across the 10 trended markets, 71% of consumers believe that industry benefits more from data sharing (down from 78% in 2018) and just 11% believe that consumers currently benefit the most (up from 9% in 2018). However, this shifts significantly across age groups. For example, among 18-24s in the UK, 27% state that the consumer benefits the most from data exchange, compared to just 1% of the 65+.

### **Global consumers say they have increased control over data sharing, but would like even more**

Since 2018, there has been a clear increase in the level of control that global consumers believe they have over the exchange of their personal data. For example, the number of consumers across the 10 trended markets who state that they have no control over ensuring that brands use their data for the purpose agreed to, has fallen from 54% in 2018 to 45% today. However, the vast majority of global consumers (82%) would like more control over the personal information they give companies.

### **Building trust remains paramount, despite a decline in relative importance since 2018**

Trust in an organisation remains the most important factor driving consumer willingness to share personal information with a company. While it has declined in importance since 2018, it remains the top influencer in facilitating data sharing. Across the 10 trended markets, 39% of consumers rank “trust in an organisation” in the top 3 factors that make them happy to share data with an organisation – down from 48% in 2018. However, this remains ahead of 30% for the second highest ranking factor: receiving free products or services.

### **Consumers continue to seek transparency as a precursor to data sharing**

Transparency remains a fundamental factor when engaging with data exchange. Today, 77% of global consumers claim that transparency around how data is collected and used is important to them when sharing their personal information. Older consumers show the highest demand for transparency. For example, 83% of those aged 55+ globally state that transparency about the collection and use of their data is important, compared to 67% of 18-34s.

### **An array of incentivisation strategies exist to engage the global consumer**

While a wide spectrum of rewards and benefits appeal to consumers in terms of their engagement with the data ecosystem, those linked to clear direct financial rewards have decreased in influence more than other forms of incentives. For example, the number of consumers who claim they would be likely to exchange personal data in return for free products and services has fallen, while incentives linked to the personalisation of product, service and brand recommendation have remained broadly unchanged. Such findings suggest that global consumers are becoming more open to service-led incentives that offer some form of personal enhancement alongside more direct financial rewards.

### **Global consumers show high levels of responsibility for their own data security, but also growing expectations of industry**

Almost 1 in 3 (32%) globally state that the consumer themselves should have ultimate responsibility for their own data security. This compares to 16% who believe ultimate responsibility should lie with governments and 15% who state that it should lie with brands. A further 28% say that data security responsibilities should be shared by all three. Within the core 10 trended markets, there has been a notable shift since 2018 towards increased expectations of brands, where the number of consumers who claim that industry should have the primary responsibility for data security has doubled from 5% in 2018 to 10% in 2022.

### **Significant growth in awareness of data protection regulations in European markets**

Public awareness of the General Data Protection Regulation (GDPR) has risen significantly across European markets. Indeed, awareness has more than doubled in all European markets since 2018. For example, it has risen from 32% in the UK in 2018 to 73% in 2022.

### **COVID-19 has had a polarising effect on attitudes to data sharing across age groups**

Living through the COVID-19 pandemic has necessitated large numbers of global consumers to increase their use of digital channels and services across how they work, shop and socialise. In the majority of markets, more consumers claim that the impact of COVID-19 has reduced their comfort levels with the sharing of personal information. However, these attitudes are driven by older age groups in society, who are more likely to have adopted increased levels of digital activities as a result of the pandemic. For example, 27% of 18-24s in both Germany and the US, state that COVID-19 has made them more comfortable with sharing personal information online. This compares to less than 5% of those 65+ in both markets.

**Growing interest in B2B data sharing for service and product enhancements**

In the 10 trended global markets, the number of consumers who would be happy for businesses to share their personal information with other businesses to deliver more personalised services and products has risen significantly from 29% in 2018 to 39% in 2022. Across the six new markets surveyed in 2022, China and India show particularly high levels of agreement with this notion at 80% and 84% respectively. Younger consumers show the most appetite for cross-industry data sharing. For instance, 64% of 18-24s in the Netherlands are happy with the notion of B2B data sharing for an improved service, but this falls to 19% among the 65+.

**Most global consumers believe data sharing can help industry and organisations respond better to the needs of all parts of a diverse society**

A majority of global consumers believe that data sharing can encourage more diverse and inclusive commercial offerings and services from industry, through the promotion of a better understanding of the attitudes and needs of a wider range of groups and identities. Almost 6 in 10 (59%) of consumers across global markets agree that the sharing of personal information can help ensure that organisations can better meet the needs of a diverse society, with agreement rising even higher among younger age groups.

**Younger consumers show a stronger willingness to share personal data to drive the competitiveness of smaller businesses**

Just under half (46%) of global consumers state that they would be more likely to share personal information to help provide a competitive advantage to smaller companies over larger ones. However, significantly higher levels of younger consumers claim they would be more likely to exchange data to support smaller businesses. For example, among the 18-34s, agreement reaches 60% in France and 64% in the UK.

# PART 1: THE CHANGING GLOBAL CONSUMER LANDSCAPE

The findings presented here demonstrate that the mature and empowered global consumer mindset towards online privacy and data exchange, first identified in the 2018 iteration of this research, has continued to develop across global markets. In addition, public awareness and acceptance of the role that data exchange plays in the modern digital economy has increased since 2018. Moreover, the expanded global coverage of the findings outlined in this report reveals that these public attitudes are apparent across a wider spectrum of global consumer markets and regions.

## **A pragmatic view towards data exchange remains the most prominent across global markets, and the unconcerned mindset is in the ascendency**

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

- **Data Pragmatists:** Those who are concerned about online privacy but 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 Unconcerned:** Those who are unconcerned about online privacy in general and characterised by lower levels of concern about the sharing of personal data
- **Data Fundamentalists:** Those who are concerned about online privacy and are unwilling to provide personal information even in return for service enhancement

In 2018, we recreated the above segmentation across 10 global markets - Argentina, Australia, Canada, France, Germany, the Netherlands, Singapore, Spain, the UK and the USA. For the purposes of this report, we have re-examined the same segmentation across the same 10 global markets and found that in 2022 these were as follows:

- **Data Pragmatists:** 47% of the population across the 10 global markets (down from 51% in 2018)
- **Data Unconcerned:** 31% of the population across the 10 global markets (up from 26% in 2018)
- **Data Fundamentalists:** 21% of the population across the 10 global markets (down from 23% in 2018)

Such findings demonstrate that while the pragmatist mindset remains the most widespread in 2022, it is the unconcerned segment that has notably increased since 2018. Indeed, it is interesting to note that the rise of the Data Unconcerned has been an established trend in the UK since 2012 – with this segment growing from 16% in 2012 to 22% in 2015, 25% in 2017 and 31% in 2022.

The findings presented here indicate that global attitudes towards online privacy and data exchange are following the same direction; towards a consumer landscape that is less concerned about data privacy and more open to engaging with the data ecosystem. The consistency of such attitudinal shifts across the 10 global markets, combined with the longer-term trends identified in the UK, point towards an apparent feature of the evolving data landscape: as digital markets around the world continue to advance and mature, there is a concomitant increase in public ease and engagement with the data and digital world.

In 2022 the research expanded the number of markets to a total of 16, extending its global representation to more than 50% of the world's population with the inclusion of Belgium, Brazil, China, India, Japan and Mexico.



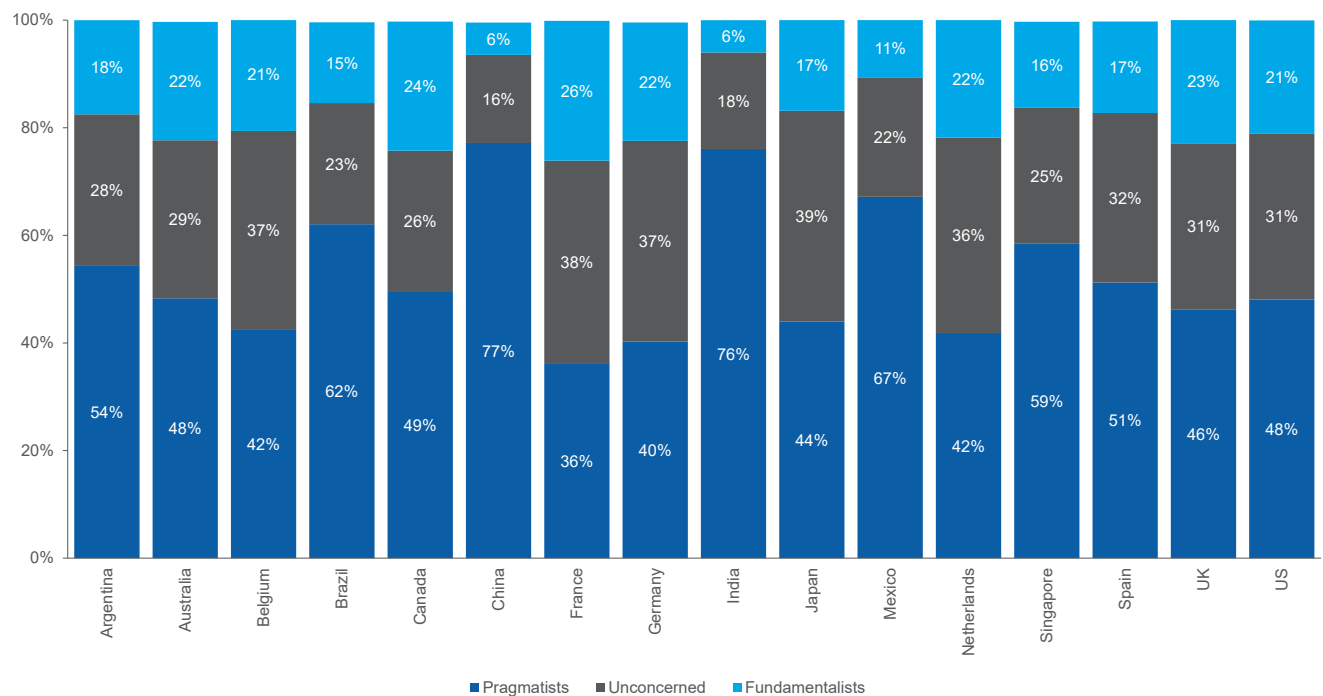
While we are not able to compare these new markets with the findings from our previous research (as they were not included in the 2018 wave), we have developed a segmentation for 2022 that covers all 16 markets and found:

- **Data Pragmatists:** 53% of the population across the full 16 global markets
- **Data Unconcerned:** 29% of the population across the full 16 global markets
- **Data Fundamentalists:** 18% of the population across the full 16 global markets

It is interesting to note that when the new global markets are included, the proportion of the fundamentalists and unconcerned segments falls slightly (by 3 and 2 percentage points respectively), in favour of the pragmatist segment which has a clear increase (up 6 percentage points). As the chart below showcases, new markets included in 2022 - namely Brazil, China, India and Mexico – all have a higher proportion of pragmatist mindsets compared to other markets.

These findings point to the possibility that within more relatively emerging markets, a pragmatist mindset is a more prevalent feature (i.e., a consumer landscape at a similar stage of markets like the UK earlier in 2012 and 2015, when the pragmatist mindset was more dominant). Alternatively, such markets may simply have a consumer landscape that is geared towards a clearer value exchange as a precursor to engagement with data sharing. Either way, what is clear is that in 2022 the vast majority (82%) of global consumers show no fundamental objection to engaging with the data economy. It is now less than 1 in 5 (18%) globally who indicate a broad unwillingness to engage in data sharing.

**A segmentation of attitudes towards privacy across all 16 global markets**



Looking across all global markets in 2022, it is interesting to note that the pragmatist mindset is the most prevalent across almost all markets, with the unconcerned segment being the second largest and the fundamentalist third. This pattern is consistent across all markets other than France, where the unconcerned segment is the largest at 38%; slightly ahead of the pragmatist segment at 36%.

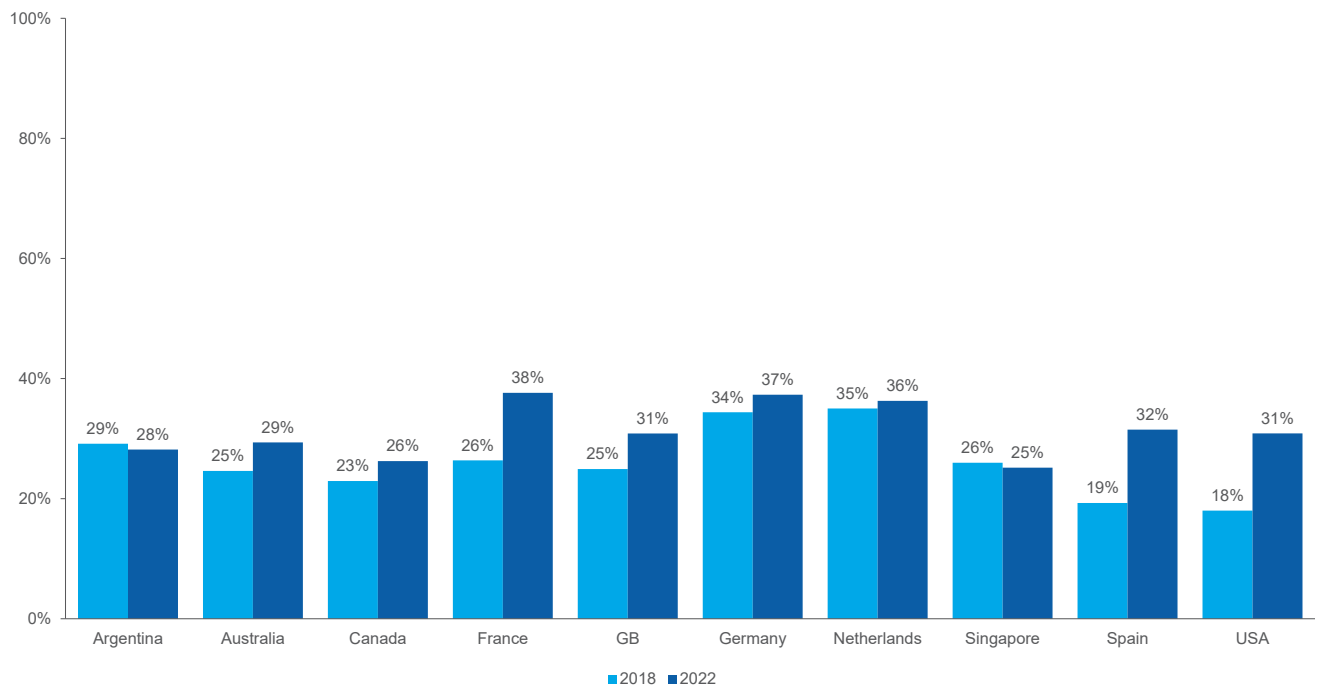
However, the level of dominance of the pragmatist mindset does vary considerably across global markets. For example, in China and India, over 3 in 4 consumers fall within the pragmatist mindset. Across the majority of other markets, the pragmatist segment falls below half, at the expense of the unconcerned who make up a more significant part of society. Indeed, in markets

such as Belgium, Germany, Japan and the Netherlands the proportion of the unconcerned rises above 1 in 3 (not far behind the proportion of the pragmatists in these markets).

It should be noted that the fundamentalist mindset remains as a relatively high proportion of society across a range of markets, with over 1 in 5 falling within this segment in Australia, Belgium, Canada, France, Germany, the Netherlands, the UK and the USA.

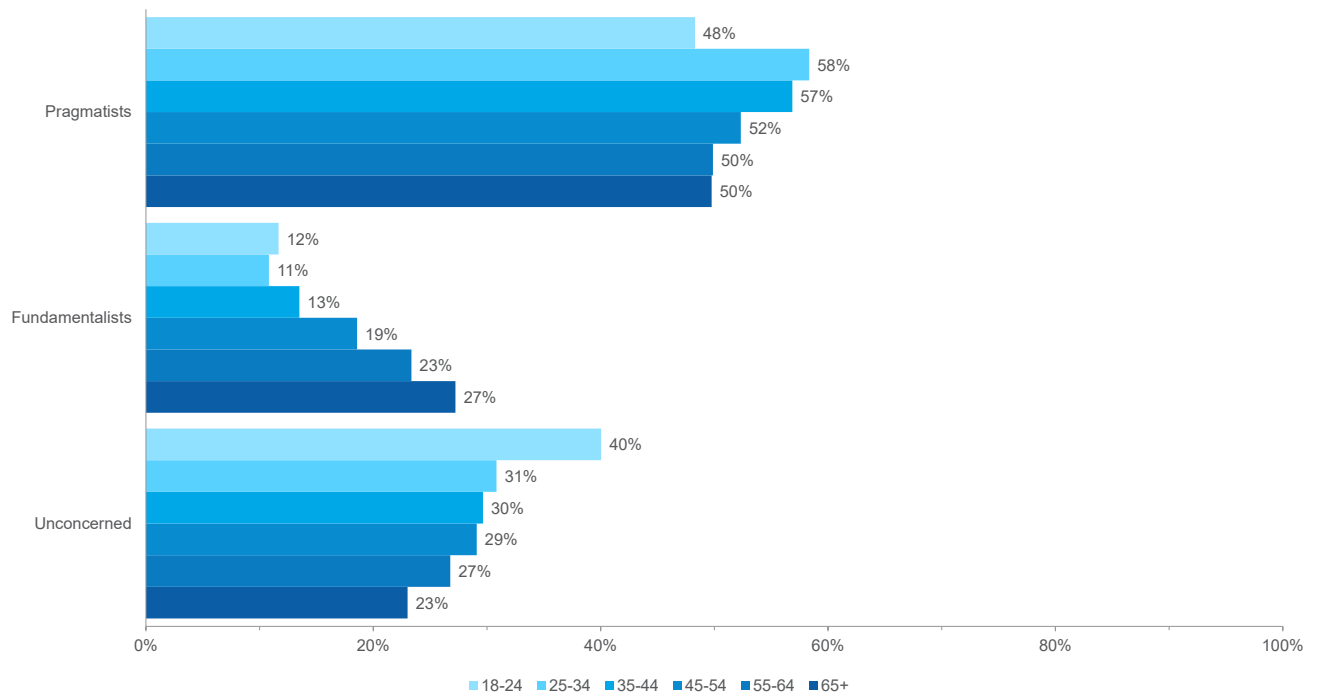
As the chart below outlines, the core change in global attitudes, across the 10 markets researched in 2018, is the growth in the unconcerned segment. What's more, this shift in attitudes is broadly consistent across markets, with only Argentina and Singapore seeing a minor decrease in the proportion of the unconcerned. The growth in the unconcerned segment is particularly pronounced in France, Spain, the UK and the USA. For example, in the USA, the proportion of the unconcerned has increased from 18% in 2018 to 31% in 2022.

### The proportion of the Data Unconcerned across global markets (2018 vs. 2022)



The rising proportion of the Data Unconcerned is being driven by younger age groups across global markets. Indeed, taking all 16 markets together, 40% of those aged 18-24 fall into the unconcerned segment compared to 23% among the 65+. However, such differences are even starker in specific markets. For example, the USA saw a notable increase in the proportion of the Data Unconcerned - 50% of 18-24s are within the unconcerned segment in 2022 vs. 17% among the 65+. The fact that a significant proportion of the 18-24 age group would not have been part of the 2018 research, combined with the significant proportion of this age group who make up the Data Unconcerned, is one clear driver of the rising numbers of the unconcerned segment across the consumer landscape in 2022.

## A segmentation of attitudes towards privacy across all 16 global markets, by age



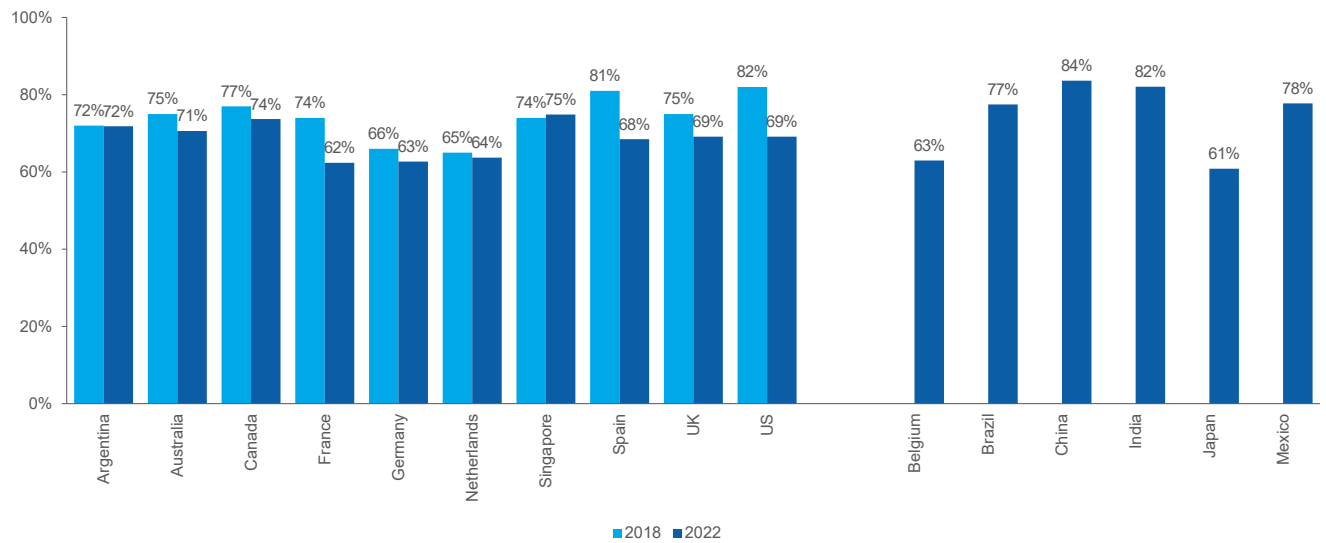
Conversely, older age groups are far more likely to comprise the fundamentalist segment. Across all 16 markets, 27% of those aged over 65 are Data Fundamentalists, compared to just 11% of those aged 25-34. Again, such contrasts are more notable in certain markets. For example, in the UK, 40% of 65+ consumers are Data Fundamentalists, but this drops to just 9% of 25-34s.

Interestingly, the Data Pragmatists are less characterised by age profiles. For example, across the 16 markets, the lowest proportion of Data Pragmatists are with those aged 18-24 where 48% fall within this segment. However, the highest proportion is with those aged 25-34, rising to just 58%; demonstrating far more consistency across age ranges compared to the other segments.

### Clear decline in levels of public concern about the issue of online privacy

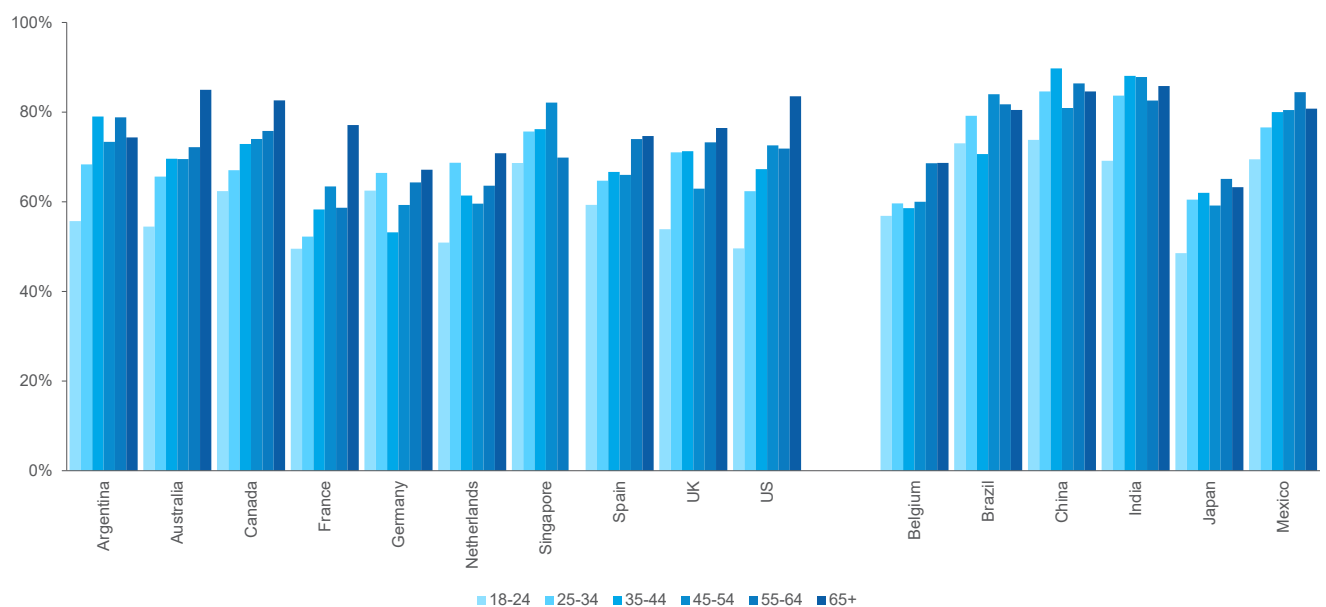
While the issue of online privacy remains a concern for a clear majority of global consumers, overall levels of concern have been in decline since 2018. Across almost all of the 10 markets researched in 2018, there has been a notable decline in the level of consumers who say they are concerned about the issue of online privacy. The only exceptions being Argentina and Singapore, where there has been relatively no change (with a 1% increase in both markets). Spain and the USA Spain and the USA have seen the most significant drop in the level of concern about online privacy, falling from 81% and 82% respectively in 2018 to 68% and 69% in 2022. However, it should be noted that overall levels of concern remain relatively high across global markets. For example, just over 80% of consumers in China and India are concerned about online privacy in 2022, falling to a low of just over 60% in markets such as Belgium, France, Germany and Japan.

**“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**



The decline in levels of concern with online privacy is being driven by relatively low levels of concern demonstrated among younger age groups, particularly the 18-24s. For example, in the UK, 76% of the 65+ are concerned about online privacy, but this falls significantly to 54% among those aged 18-24. In the USA, such differences are even starker, with 84% of the 65+ claiming to be concerned about online privacy vs. just 50% of 18-24s. While such age-related differences are not as apparent across all markets, it is clear that younger age groups showcase significantly lower levels of concern across the vast majority of markets. The notable exception to this global trend is Germany, where the difference in levels of concern among the youngest and oldest age groups is much less apparent (63% vs. 67%).

**“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, by age**

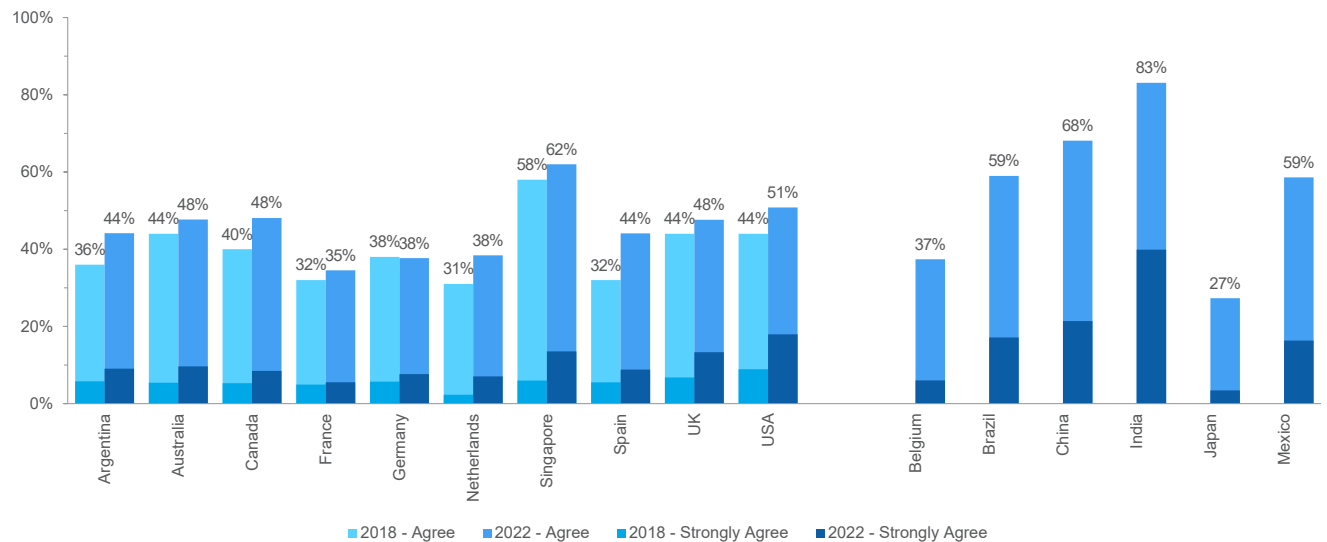


**Consumer comfort with sharing data has increased across global markets**

The extent to which consumers feel more comfortable with the notion of data exchange with businesses varies considerably by market, reaching a high of 83% in India and 68% in China, but falling to a low of just 27% in Japan.

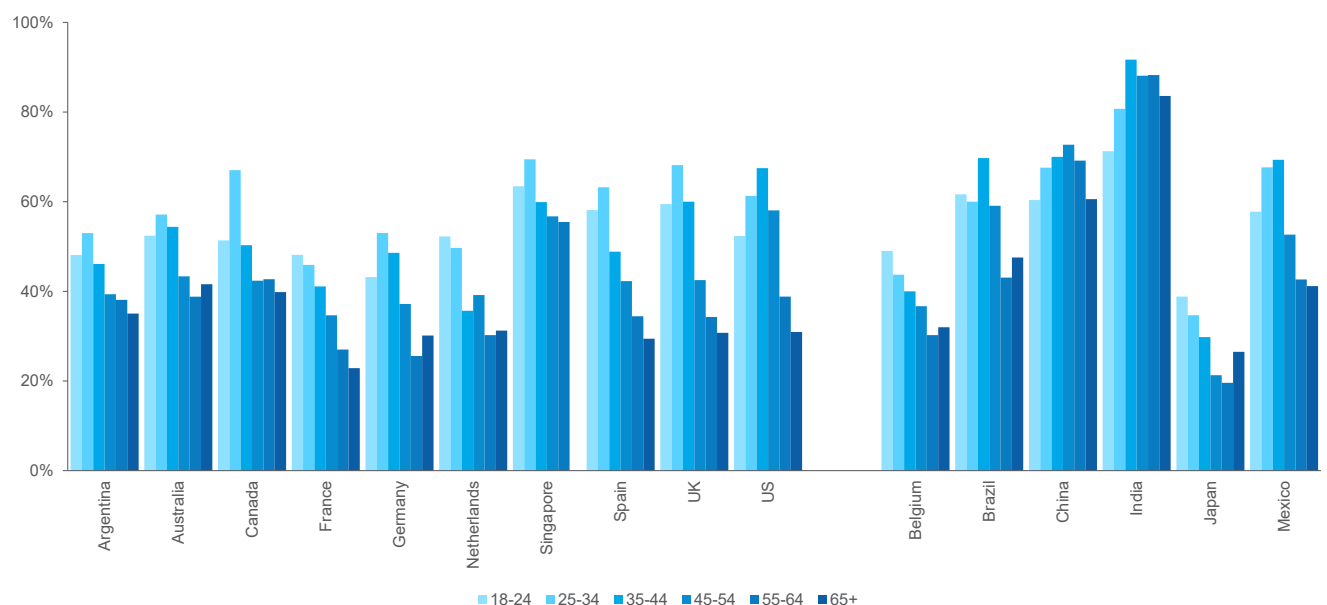
Trended data for the 10 markets covered in both 2018 and 2022 highlights that comfort levels are increasing over time. In all 10 markets, agreement with this notion has increased, apart from Germany where there has been no change in public sentiment. Such increases in comfort levels are particularly notable in markets such as Argentina and Spain, with agreement rising to 44% in both markets in 2022, compared to 36% in 2018 in Argentina and 32% in Spain.

**“I feel more comfortable with the idea of exchanging some personal data with companies than I did previously” | % who strongly agree or agree**



Increased levels of comfort with data sharing are particularly apparent among younger age groups. For example, in France 48% of 18-24s claim to be more comfortable with data exchange, compared to 23% of the 65+. In Canada, 67% of those aged 25-34 claim to be more comfortable vs. 43% of those aged 55-64. Interestingly, the increased comfort levels are more consistent across age groups in China and India compared to other global markets.

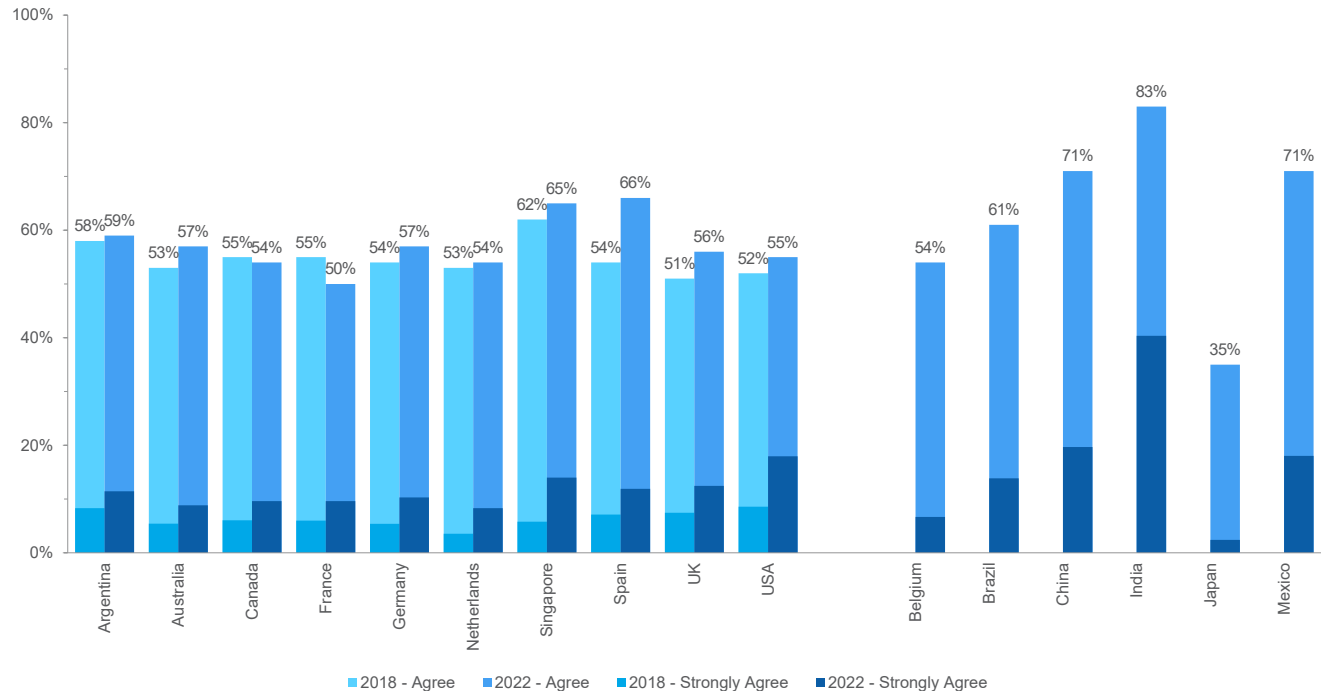
**“I feel more comfortable with the idea of exchanging some personal data with companies than I did previously” | % who strongly agree or agree, by age**



A clear majority of global consumers also claim to be happy with the amount of personal information they share with organisations, with an average of 59% agreeing across all 16 markets. Agreement reaches a high of 83% in India and 71% in China, falling to a low of 54% in Belgium, Canada and the USA. What’s more, the trended data points to a global consumer landscape that

is becoming increasingly content with the amount of personal information they share; agreement with this question has increased in all markets, other than Canada and France. For example, in Australia, 57% now claim to be happy with the amount of data they share compared to 53% in 2018.

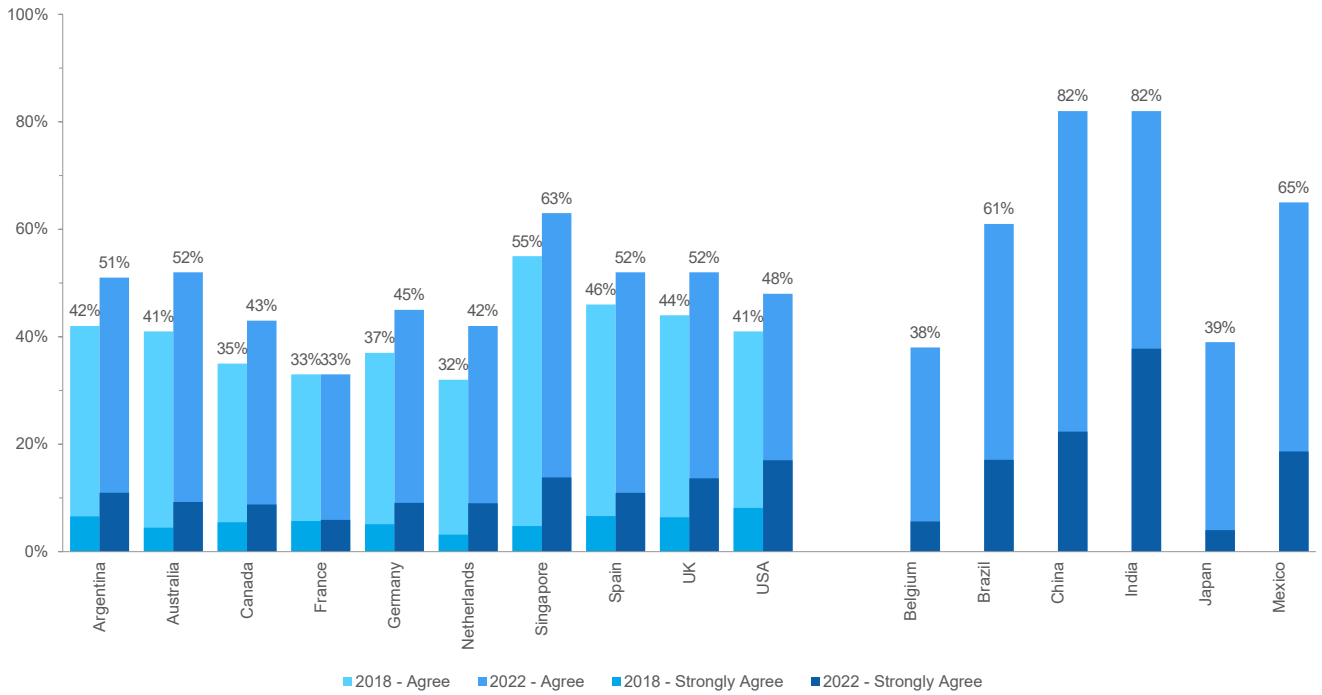
**“On the whole I am happy with the amount of personal information I give to organisations these days” | % who strongly agree or agree**



**Growing awareness of the role of data sharing for the running of modern societies**

Alongside being more comfortable with the idea of data sharing and the amount of personal information shared, the majority of global consumers also show a clear understanding of the role of data exchange to support the running of modern society. In 2022, an average of 53% of consumers across all 16 markets agreed with this sentiment, with agreement levels reaching as high as 82% in China but falling to a low of 32% in France. Despite a clear disparity in the level of agreement across markets, there is a clear trend since 2018 of global consumers showing stronger agreement that data exchange is vital to the smooth running of modern society. Across the 10 markets also surveyed in 2018, agreement with this statement has increased in all markets apart from France, where agreement levels are static and remain low. Indeed, in markets such as Argentina, Australia, the Netherlands and Spain, there has been an approximate 10-percentage point increase in agreement between 2018 and 2022.

**“The exchange of personal information is essential for the smooth running of modern society” % who strongly agree or agree**



Taken together, such findings point towards an increasingly comfortable, aware and confident global consumer, providing fertile ground for the continued growth of the data economy. However, there remain significant disparities in attitude and outlook across global markets and age groups within markets. To capitalise on the positive trends outlined above and to expand wider consumer confidence and engagement with data exchange across and within markets, increased focus will need to be placed on the factors that drive a healthy and sustained engagement with the data ecosystem. It is these factors that will be explored in part 2 of this report.

# PART 2: PROMOTING A HEALTHY GLOBAL DATA ECONOMY

The global consumer is becoming more aware of the intrinsic value of their data and is developing a more entrepreneurial attitude towards data sharing; as a value exchange where both sides can gain benefits.

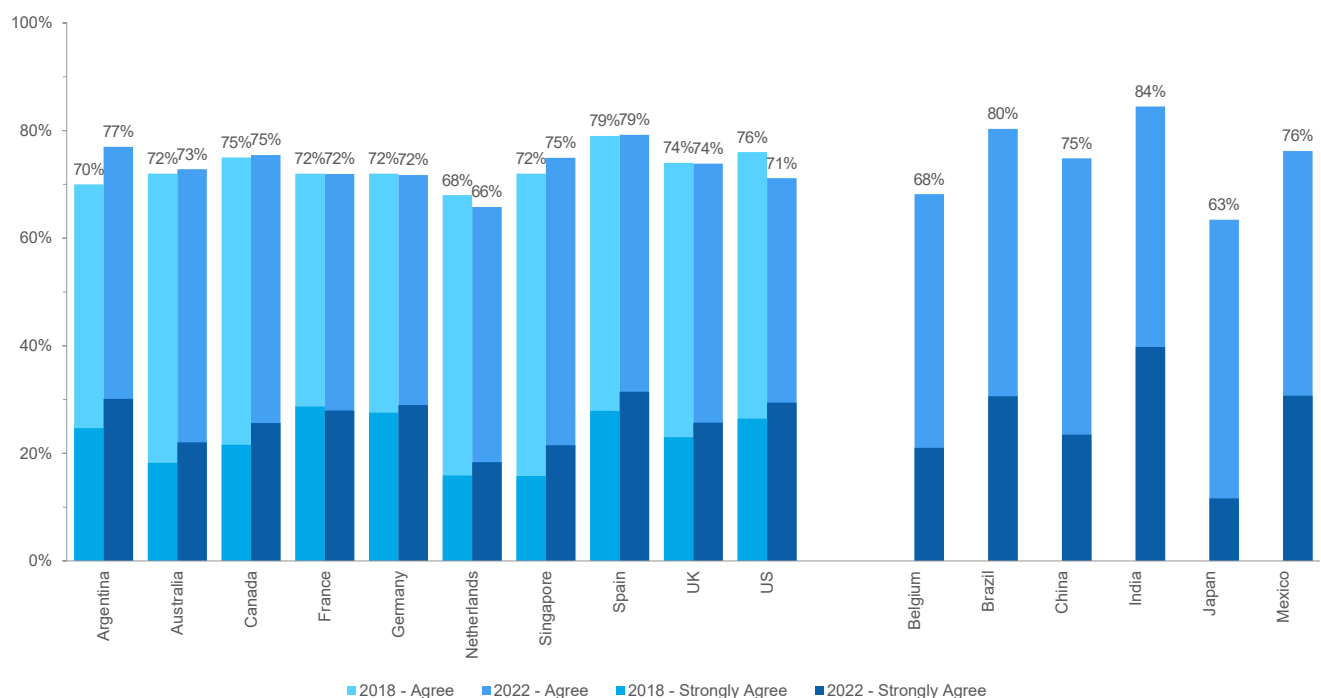
However, challenges remain for the future of the perceived value exchange on offer. A high proportion of consumers globally continue to believe that industry benefits the most from data sharing, while a majority also expect to receive continuously enhanced levels of service without the need to share more personal information. Such findings point to an emerging disconnect between consumers and industry over the requirement of data sharing to fuel future innovation and improvements in customer experience and service.

To build a healthier data ecosystem, it is clear that trust, control and transparency remain the foundational factors that will entice consumers to exchange data with brands and organisations. What’s more, there is a wide range of incentives that global consumers are willing to exchange personal information for, providing industry with a diverse arsenal of value exchange options to engage different consumer groups with. However, more innovative, visible and compelling incentivisation strategies will be required if global businesses are going to ensure they have sustainable access to the required levels of consumer data in the 2020s.

## A consumer capitalist mindset has continued to advance across global markets

The vast majority of consumers across markets agree that their data is their property and that they should be able to trade it if they wish, with 74% agreeing with this statement across the 16 global markets. Such attitudes are particularly pronounced in emerging markets like Brazil and India where agreement reaches 80% and 84% respectively. Moreover, there has been a slight rise in agreement within the 10 trended markets, with those who strongly agree rising from 23% in 2018 to 26% in 2022. The most notable increase in such sentiments is in Argentina where agreement has risen from 69% in 2018 to 77% in 2022.

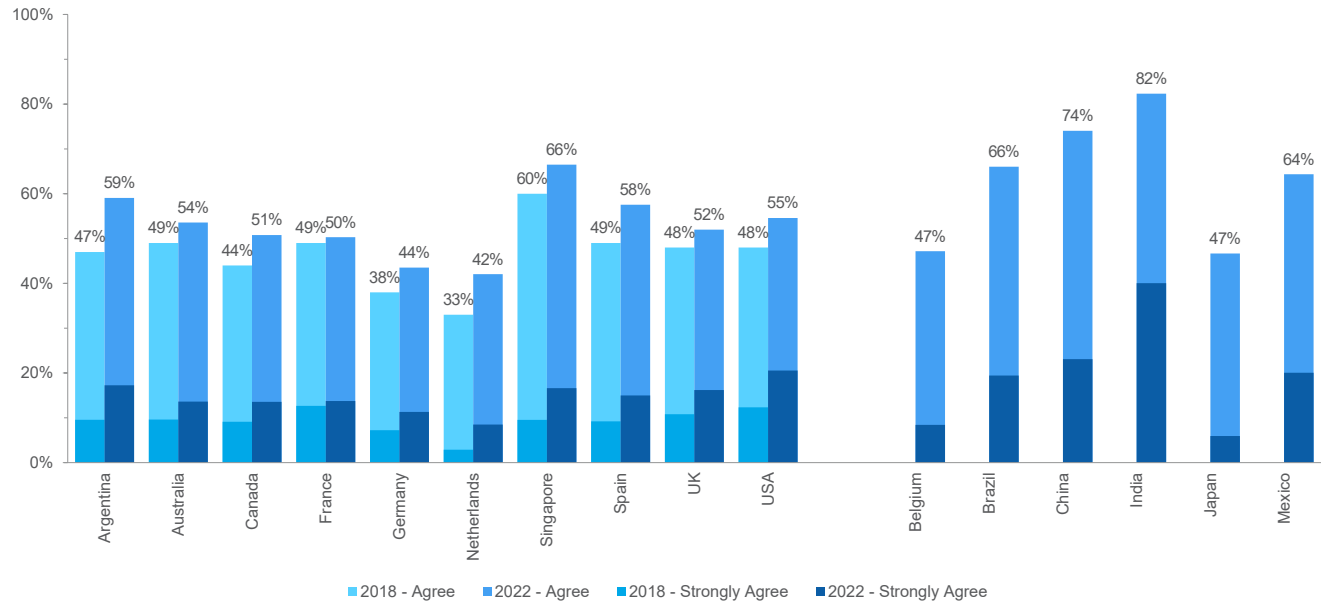
### My data is my property and I should be able to trade it if I like (e.g., for better offers, services) % who agree strongly or agree





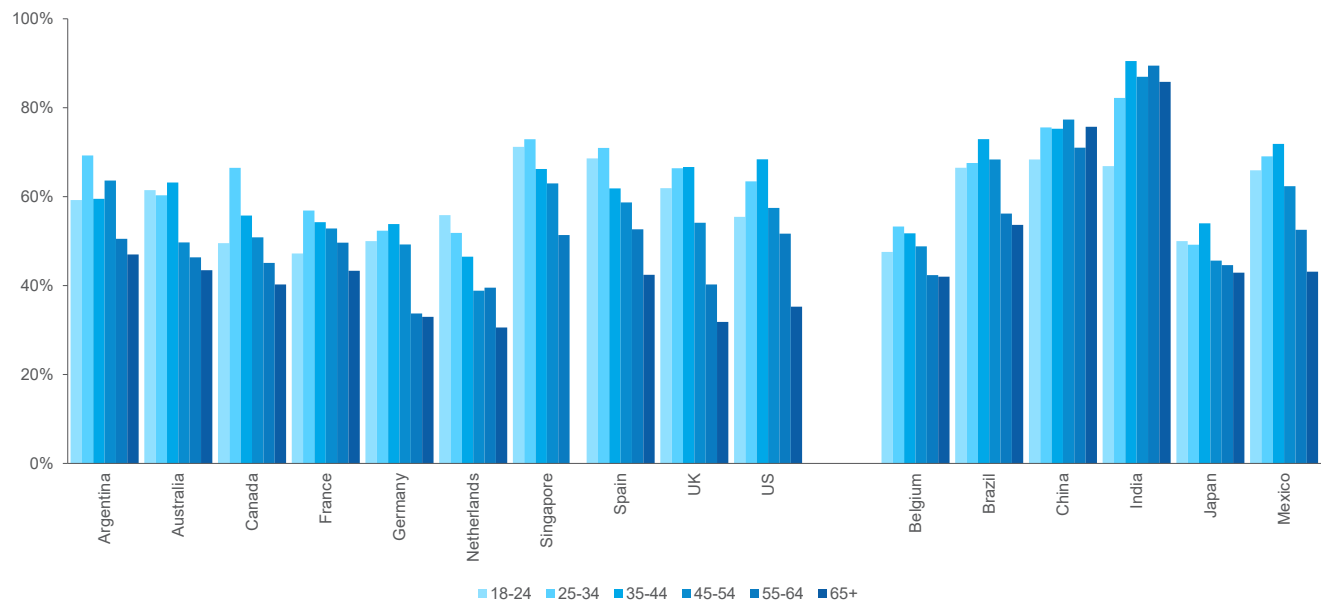
However, the most notable shift since 2018 is the extent to which consumers believe that they can leverage the value of their data. It is now 57% across all markets who agree that their personal information is an asset that can be used to negotiate better prices and offers with companies. Agreement with this sentiment has also increased across the trended 10 markets with 53% agreeing in 2022 compared to 46% in 2018. Again, consistent with the findings directly above, Argentina has seen the most significant rise in agreement, from 46% in 2018 to 59% in 2022. However, it should be noted that the extent to which data is viewed as a personal asset varies considerably across markets, reaching as high as 82% in India but falling to a low of 42% 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**



Moreover, the proportion of consumers who view their data as an asset diverges by age as well as geography. For example, in the UK and the USA, around 2 in 3 of consumers aged 25-34 agree with this statement, but this falls to around 1 in 3 among the 65+.

**“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, by age**

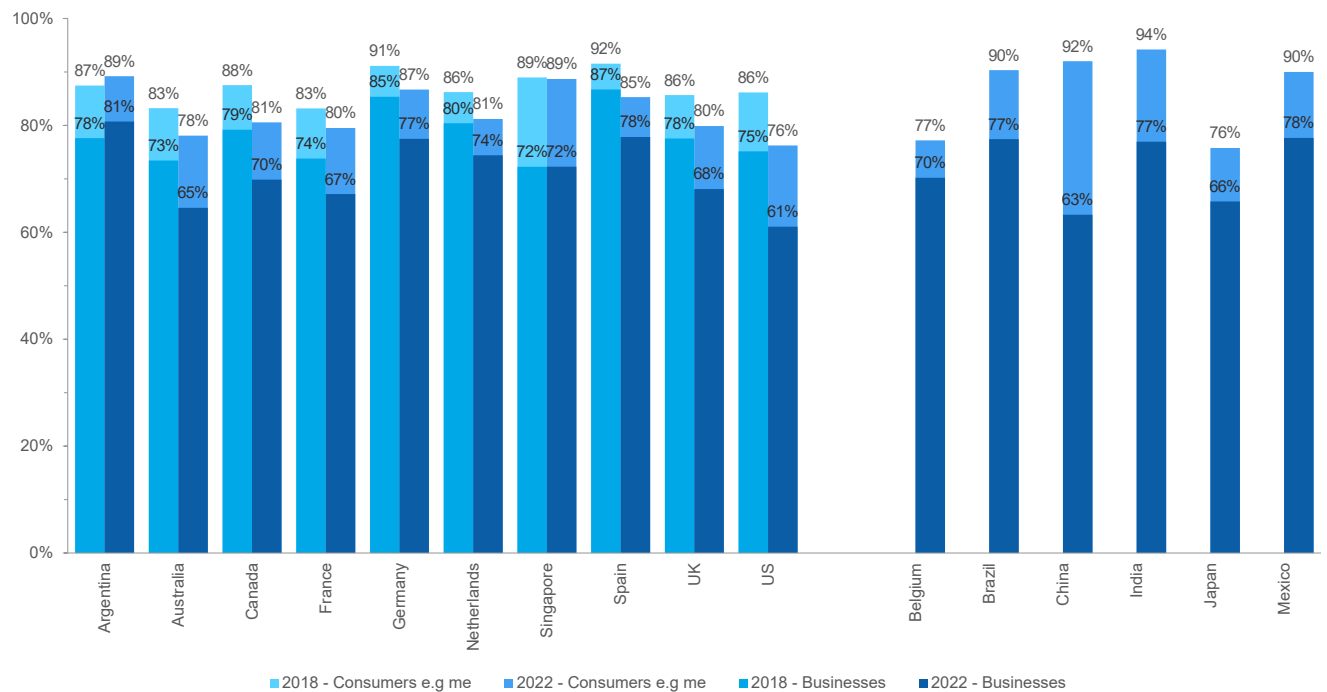


The direction of travel since 2018 is clearly towards a global consumer landscape that is more likely to view personal data as having an intrinsic value that can be utilised for personal advantage within the data economy. However, such attitudes will need to become more widely distributed across global markets and age groups, if all parts of global societies are to develop a stronger level of engagement.

**Global consumers continue to believe that industry benefits most from data exchange**

Despite the growth in consumers seeing their personal information as an actionable asset, most still believe that businesses benefit most from data exchange. There has, however, been a minor increase in the number who believe that consumers themselves reap the most benefits across the 10 trended markets (from 9% in 2018 to 11% in 2022). It is interesting to note the extent to which China stands out in terms of the proportion of consumers who believe that they benefit the most, with 29% agreement (far exceeding the global average of 13% for all 16 markets). Despite this, it remains clear that a high majority of global consumers do not believe they are being rewarded by the data economy to the same degree as industry.

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

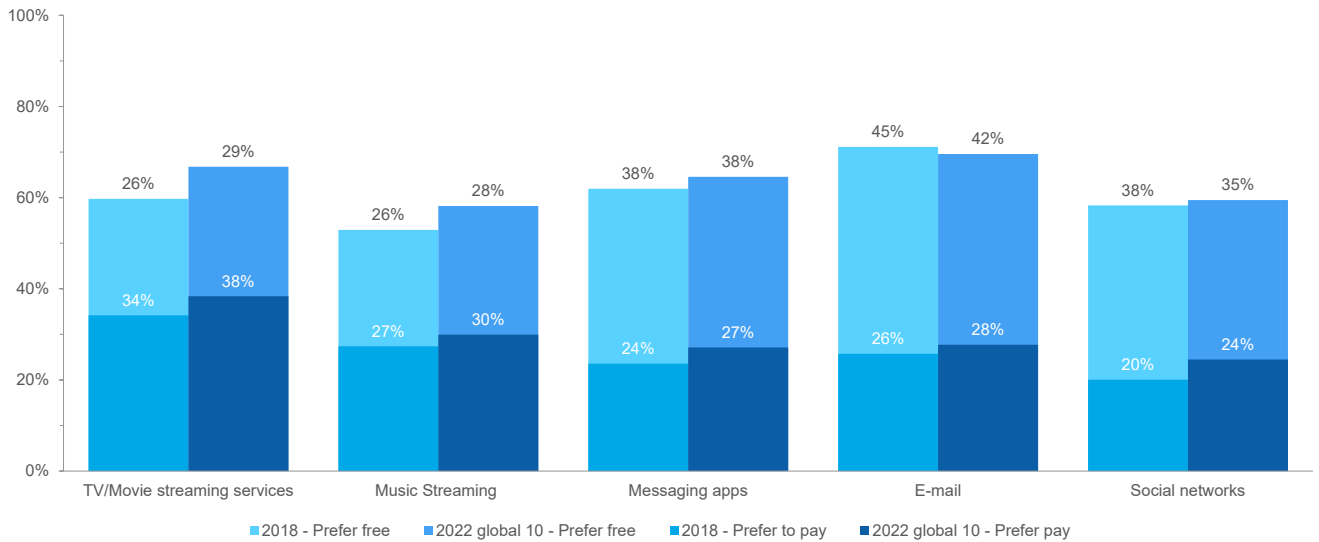


However, such attitudes do shift significantly across age groups in most markets. For example, among 18-24s in the UK and the USA, 27% and 23% respectively state that the consumer benefits most from data exchange, compared to 1% in the UK and 5% in the USA among those aged 65+.

**Challenges for the current data economy: public perceptions of the current and future value exchange**

While consumers remain more likely to exchange data than pay for messaging apps, email and social networks, a significant minority would still prefer to pay for these services than receive them for free in exchange for their personal information. For streaming services that already offer optional paid subscription models, a higher number of consumers would prefer to pay rather than exchange their personal information to receive the service for free. The degree to which consumers are willing to exchange personal information in exchange for services does, however, vary significantly by country. In India, consumers show a clear preference for exchanging data over paying, with 60% of consumers preferring to exchange their personal information rather than pay for email. China stands out as the only country where a higher number of consumers would rather pay than exchange their personal information for all the services listed.

**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**

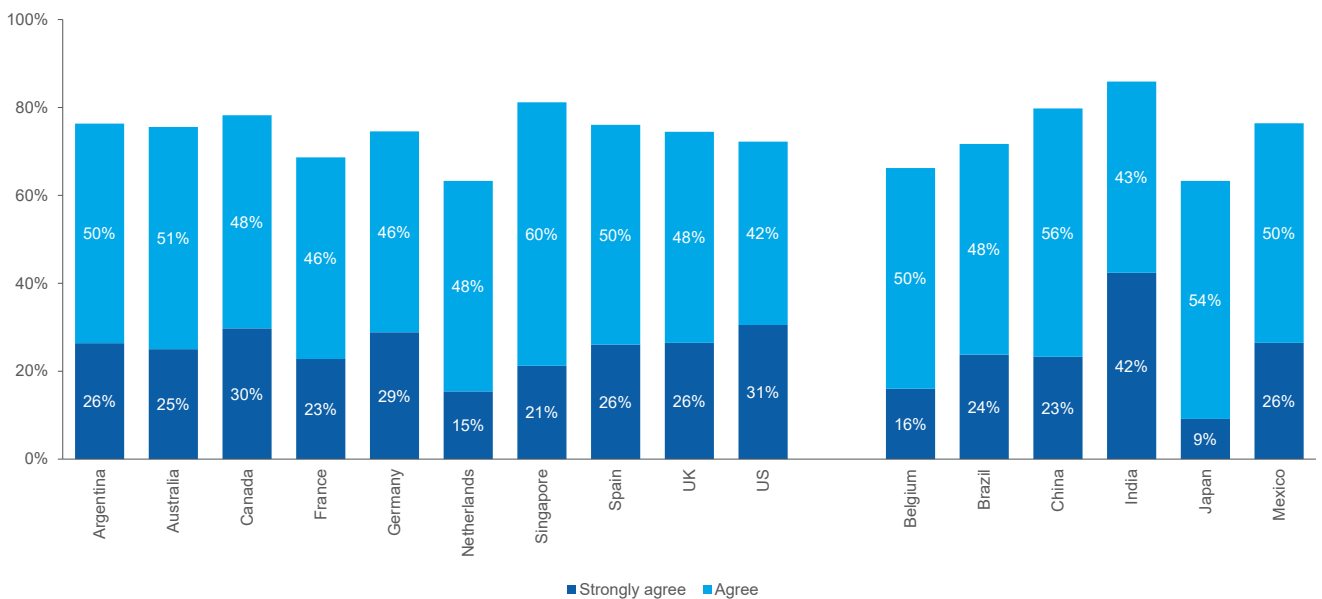


Global consumers who would rather pay for typically free services (messaging apps, email and social networks) state that they would be prepared to pay \$6-7 a month to access these services. For these consumers, the value of receiving these services for free does not currently equate to the value perceived worthy of them relinquishing their personal information.

What’s more, even when consumers are willing to exchange their personal information for a service, they are not necessarily willing to trade new or increased forms of personal information on an ongoing basis. Indeed, 74% of global consumers across all 16 markets agree that they expect companies to keep improving the levels of personalisation they provide without having to provide more of their personal information. It is a clear majority in all markets that hold such views, reaching over 80% in India and Singapore, falling to a low of 63% in Japan and the Netherlands.

**“I expect companies to keep improving the levels of personalisation they provide without having to give them more of my personal information”**

**How much do you agree or disagree with the following statements? | % who agree**



Such findings point to a disconnect between the data sharing requirements for sustainable engagement with the future data economy and current global public attitudes. For industry, the challenge will be to not just communicate the value exchange on offer today, but also the future value offered by expanded data sharing that will drive future innovation and optimise consumer services and experiences.

**Foundations for a healthy data economy**

The three key pillars of positive engagement outlined in 2018 - control, trust and transparency - remain integral to a healthy global data ecosystem in 2022. As public awareness and confidence increases, consumer expectations around these pillars have also evolved.

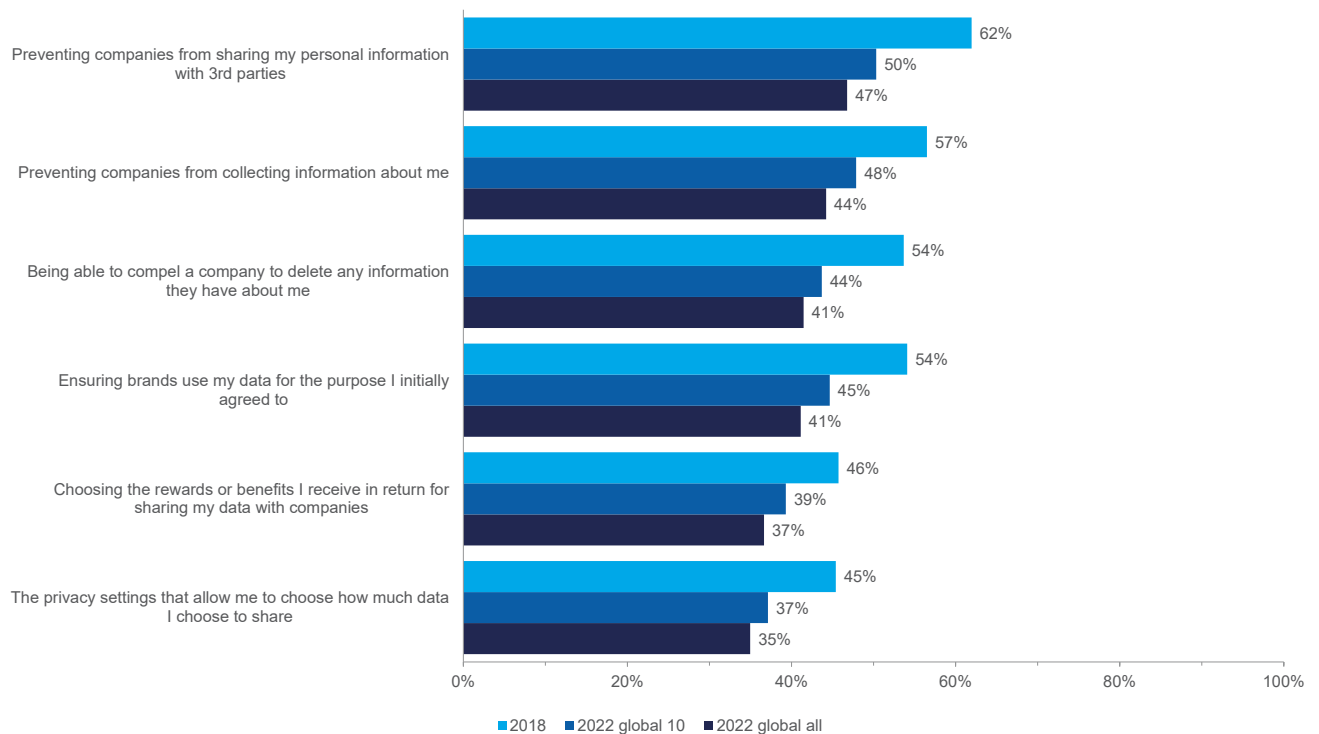
**Control remains key**

The number of consumers who believe they have no control over aspects of their personal information has declined significantly since 2018. For example, in 2018, 54% of consumers across the 10 trended markets believed that they had no control in ensuring that brands used their data for the purpose they had initially agreed to, declining to 45% of consumers in 2022. What's more, in 2018, 45% across the 10 trended markets believed they had no control over the privacy settings that allow them to choose how much data they share; this has dropped to 37% in 2022.

What's more, it is notable that the Data Fundamentalists segment indicate significantly lower levels of control over the collection and use of their personal data. For example, 68% of the Data Fundamentalist segment across all 16 markets claim to have little or no control over preventing companies from collecting information about them. However, this falls to 41% among the Data Pragmatists and to 37% among the Data Unconcerned. Such findings indicate that a consumer's sense of control over the exchange of their personal information is a driver of their wider levels of concern and comfort with data exchange.

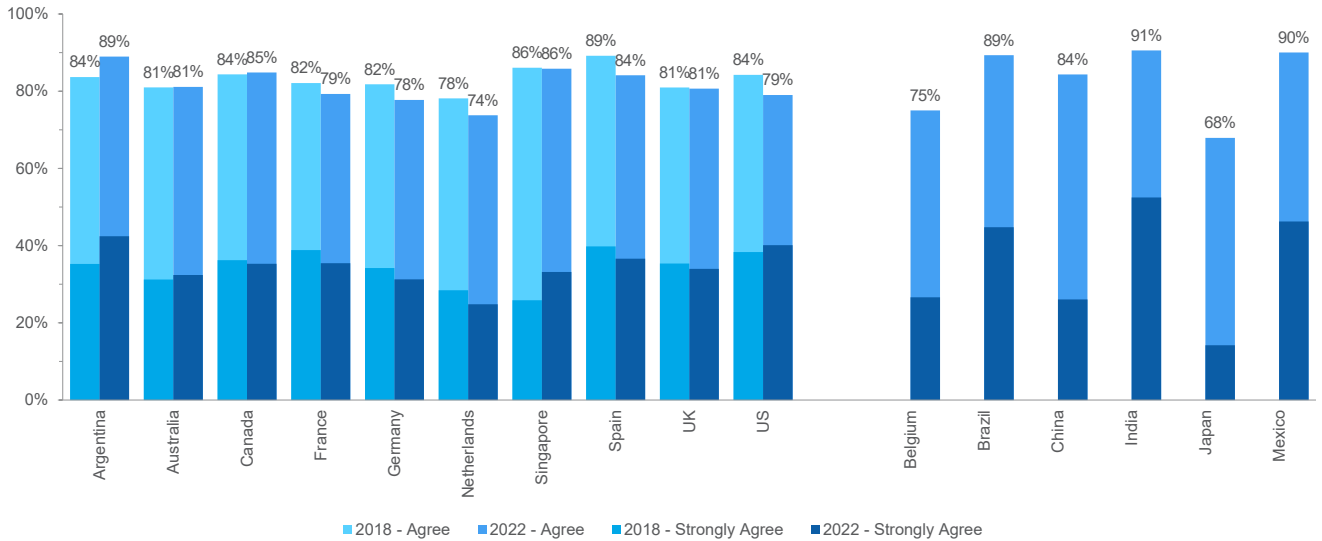
**How much control do you think you have over the following?**

**Net: Does not feel they have any control**



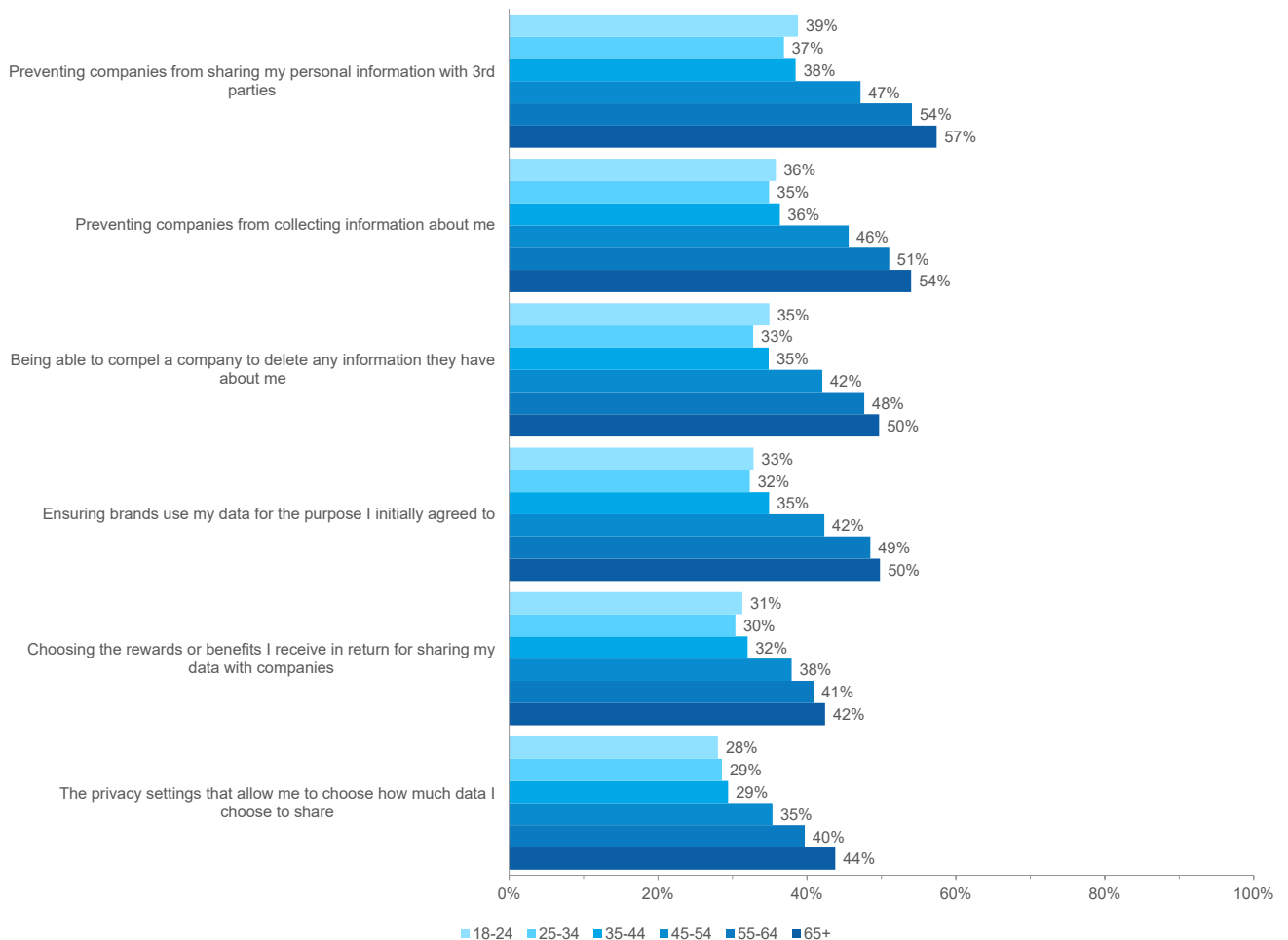
Despite global consumers believing they have more control over aspects of their exchange of personal information, a vast majority of consumers still seek more control over their data. Even as consumers grow in confidence with how they regulate their personal data exchange, continued efforts to help consumers feel in control of their personal information will be essential.

**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 (global average across all 16 markets)**



It is also apparent that older age groups are more likely to feel a lack of control over the exchange and use of their personal data compared to younger age groups. For example, across all 16 markets, just over 50% of those aged 55+ believe they have no control over preventing companies from collecting information about them, compared to 35% of those aged 18-35.

**How much control do you think you have over the following?  
Net: Does not feel they have any control, by age (global average across all 16 markets)**

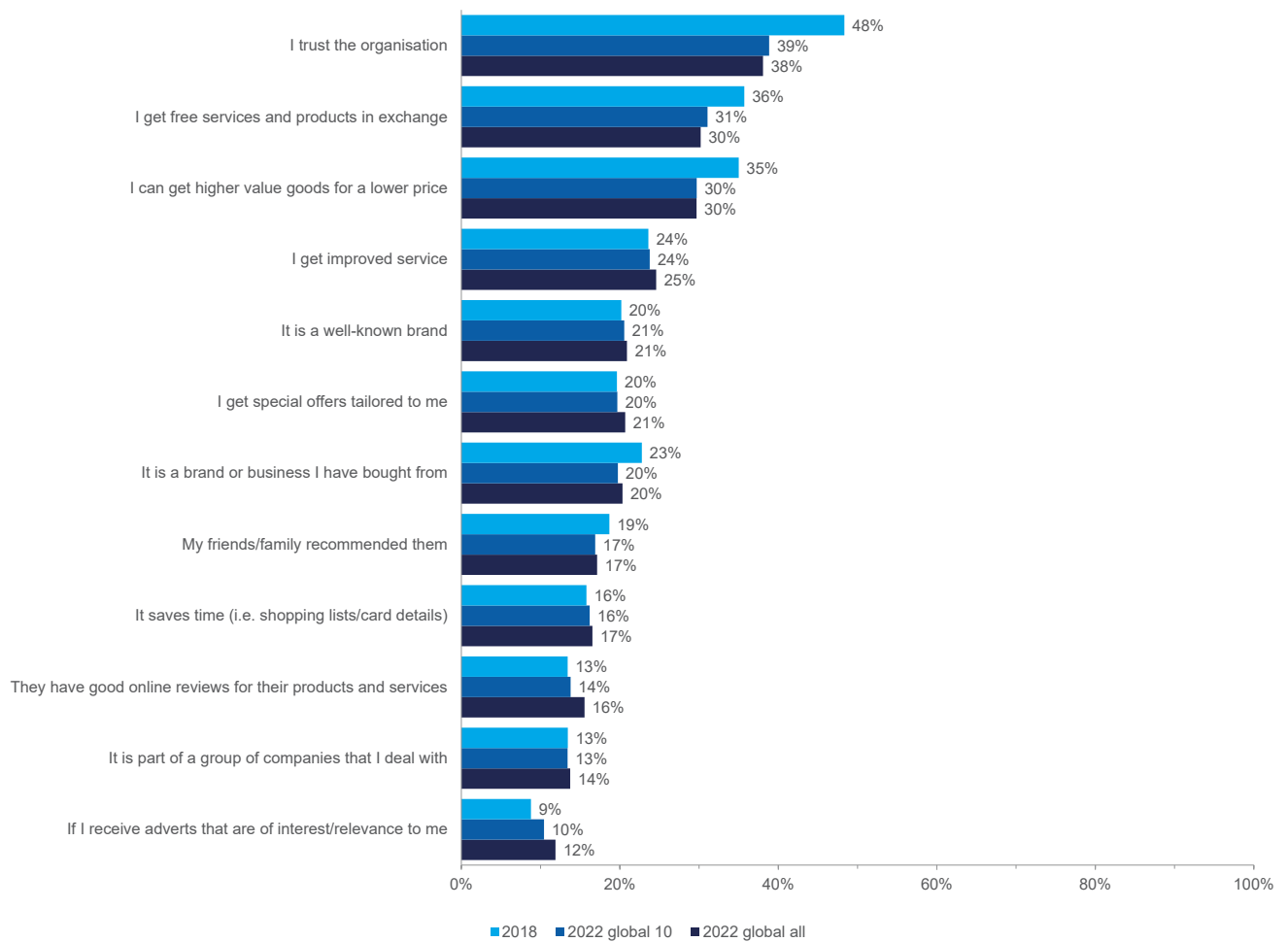


Consequently, while there has been a notable increase in the levels of control global consumers believe they have over their personal data exchange, the wish for increasing levels of control remains a core consumer demand. What’s more, it is older age groups in particular that will need to be empowered with a greater sense of control in order to drive better engagement with the data economy.

**Building trust remains paramount**

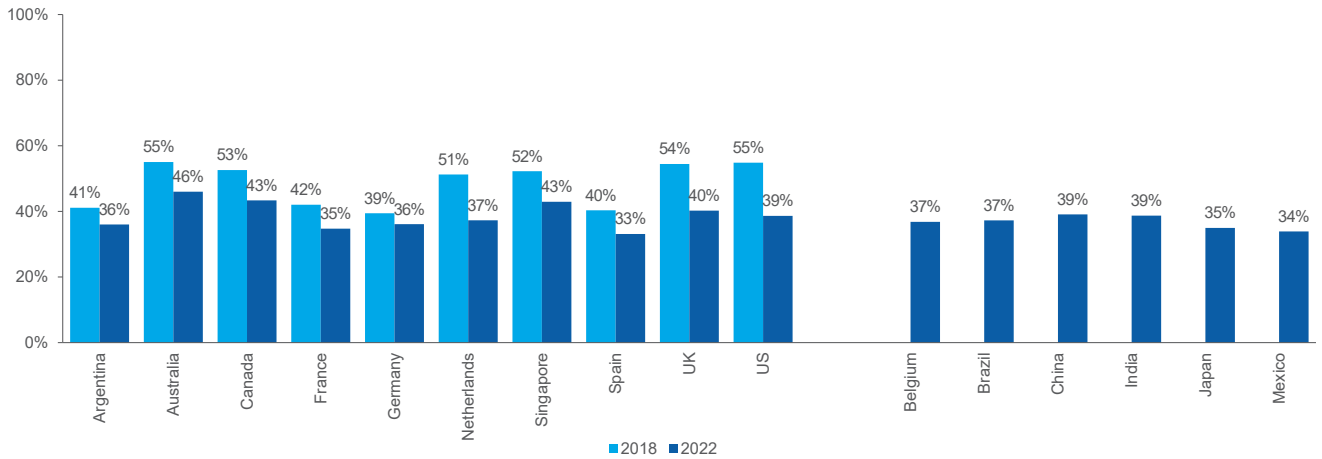
Trust in an organisation is still essential in ensuring that consumers are happy to share their personal information with a company. While it has declined in importance since 2018, it remains the top influencer in facilitating data sharing, followed by cost-related benefits. Across the 10 trended markets, 39% of consumers place trust in an organisation in their top 3 factors that make them happy to share the data with a company, down from 48% in 2018.

**Please rank the following in terms of what makes you happy to share your personal information with a company? | Net: Top 3 (Global average)**



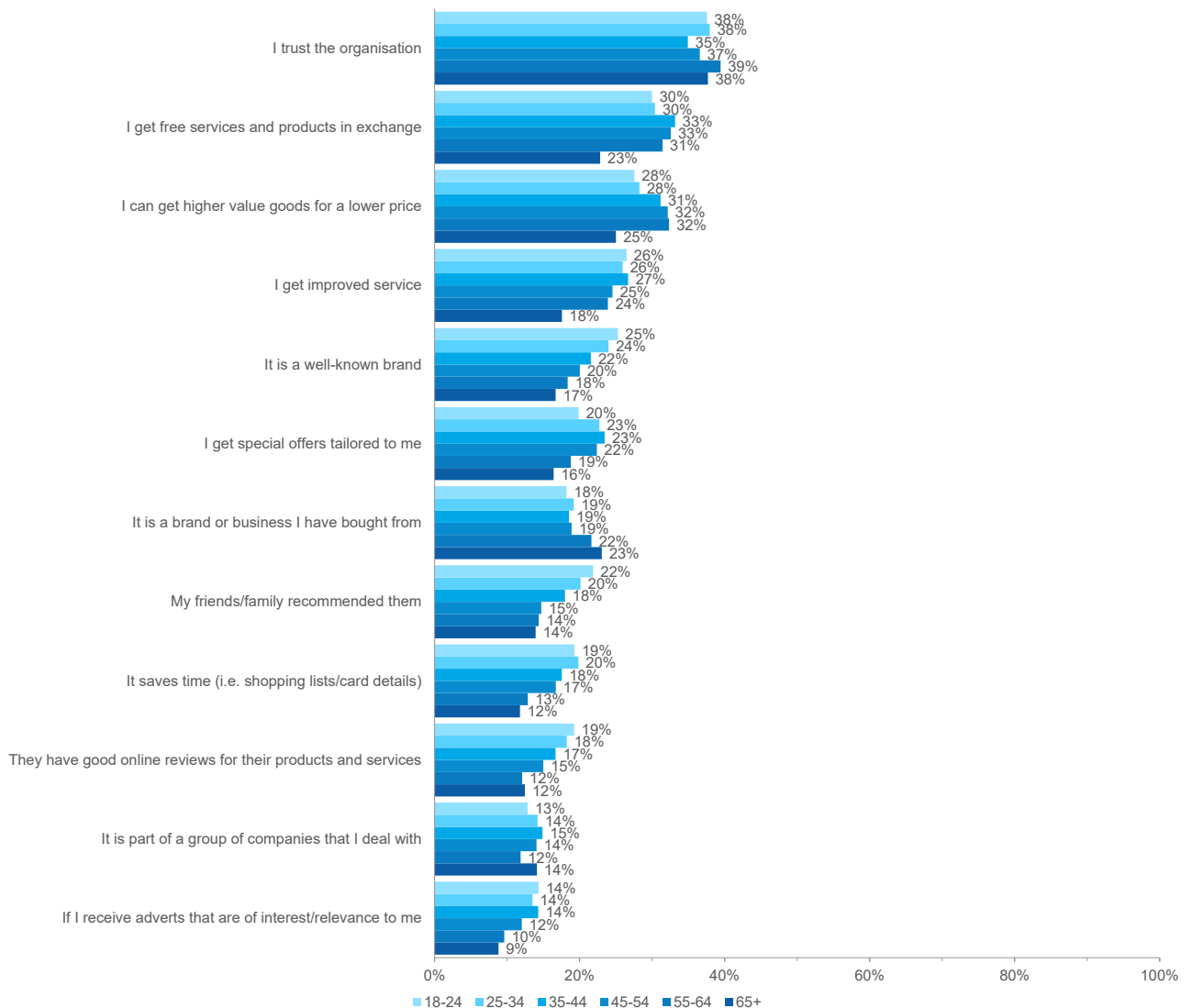
Agreement levels in 2022 are broadly consistent across markets, reaching a high of 46% in Australia and falling to a low of 33% in Spain. Furthermore, the shift towards trust becoming less of a significant factor compared to 2018 is also consistent, with a notable drop in each of the 10 trended markets.

**“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**



Moreover, the importance of trust as a driver of data exchange remains consistent across age groups. In all 16 global markets, trust in an organisation is the most important factor in making consumers happy to share their personal information across all age groups.

**Please rank the following in terms of what makes you happy to share your personal information with a company? | Net: Top 3 (Global average for all 16 markets, by age)**



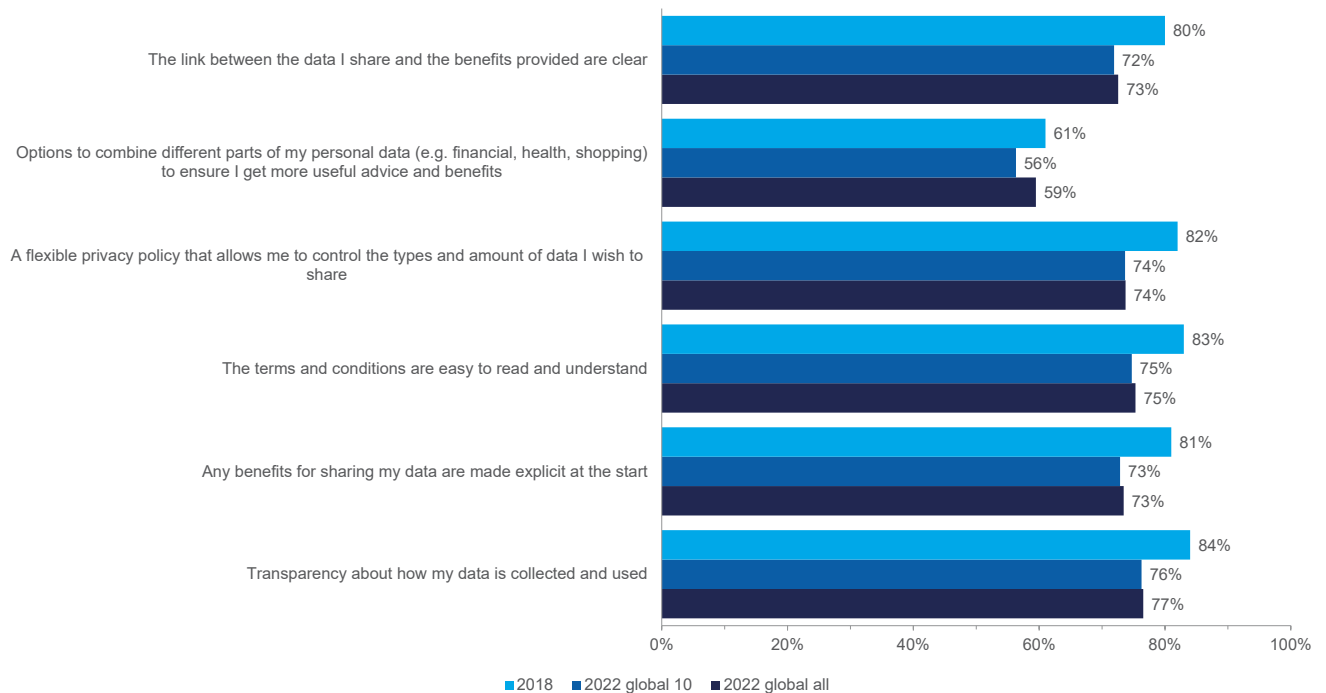
However, the gap between trust as the primary factor vs. the other factors selected is much wider among the 65+, indicating that trust in an organisation has a more relative influence on the oldest in society compared to other age groups.

**Consumers continue to seek transparency as a precursor to data sharing**

Closely related to both control and trust is the desire for companies to be transparent with how consumer data is collected and used. Transparency remains a fundamental factor when sharing personal information with a company, with 3 in 4 across all 16 global markets claiming that transparency over the terms and conditions and the personal benefits received is important to them when sharing their data with businesses and organisations. In the 10 trended markets, transparency remains a fundamental factor, although it is less important than it was in 2018. For example, in 2022, 76% of consumers within the 10 trended markets agreed that transparency around how data is collected and used is important to them when sharing their personal information, down from 84% in 2018.

Interestingly, across all 16 global markets in 2022, 6 in 10 consumers claim that options to combine different parts of personal data (e.g., financial, health, shopping) in order to provide enhanced services, are important to them when it comes to sharing personal data. Such findings indicate a high level of consumer demand for more integrated data services that combine a spectrum of consumer information to drive better, more actionable advice and benefits.

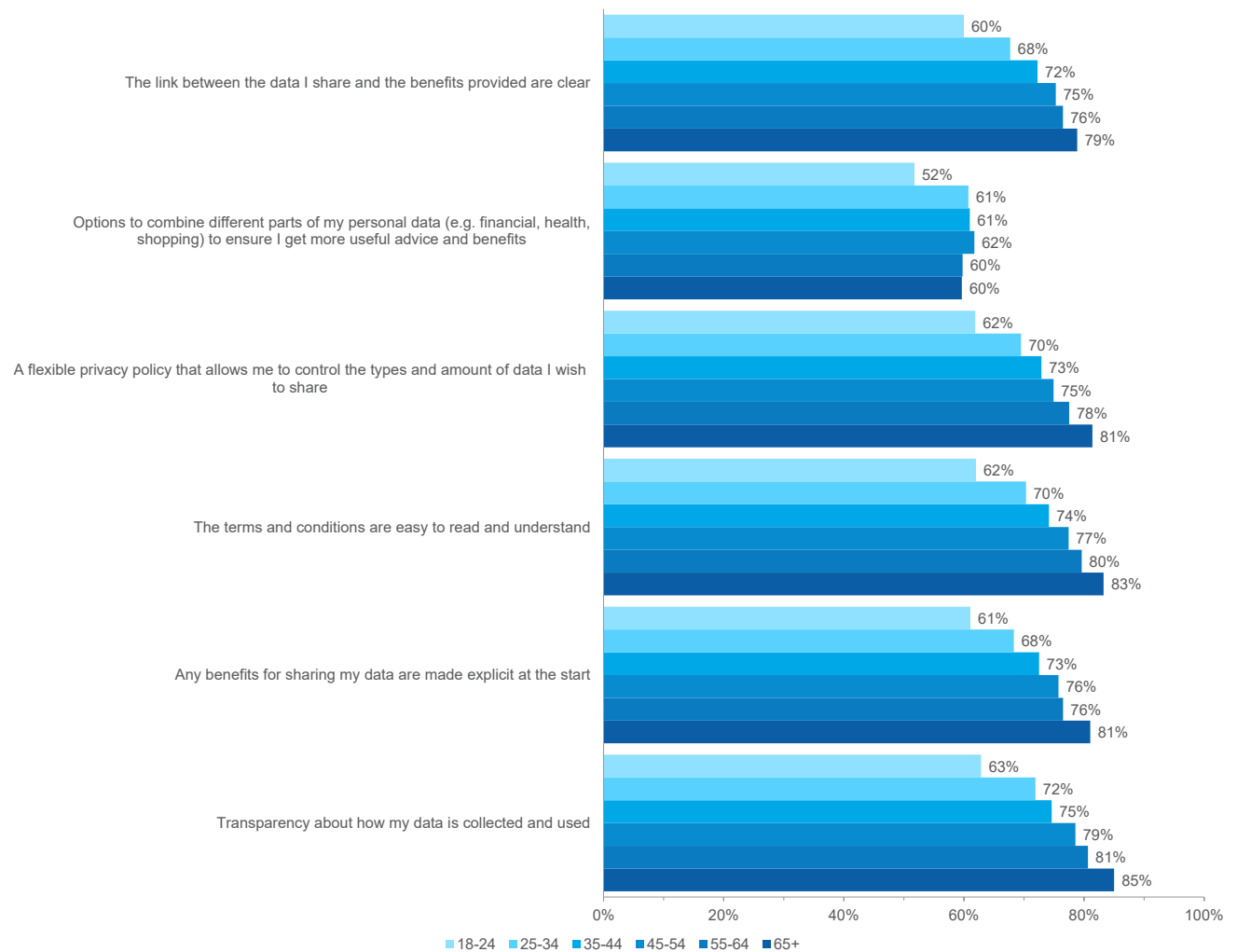
**How important are each of the following to you when sharing your personal information with a company? | Net: Very Important & Important**



It should be noted that older consumers show higher demand for transparency. For example, 83% of those aged 55+ globally state that transparency about how their data is collected and used is important, compared to 67% of 18-34s. Moreover, 81% of the 55+ claim that the ease of understanding the terms and conditions is of importance vs. 66% among the 18-34s.



**How important are each of the following to you when sharing your personal information with a company? | Net: Very Important & Important, by age**



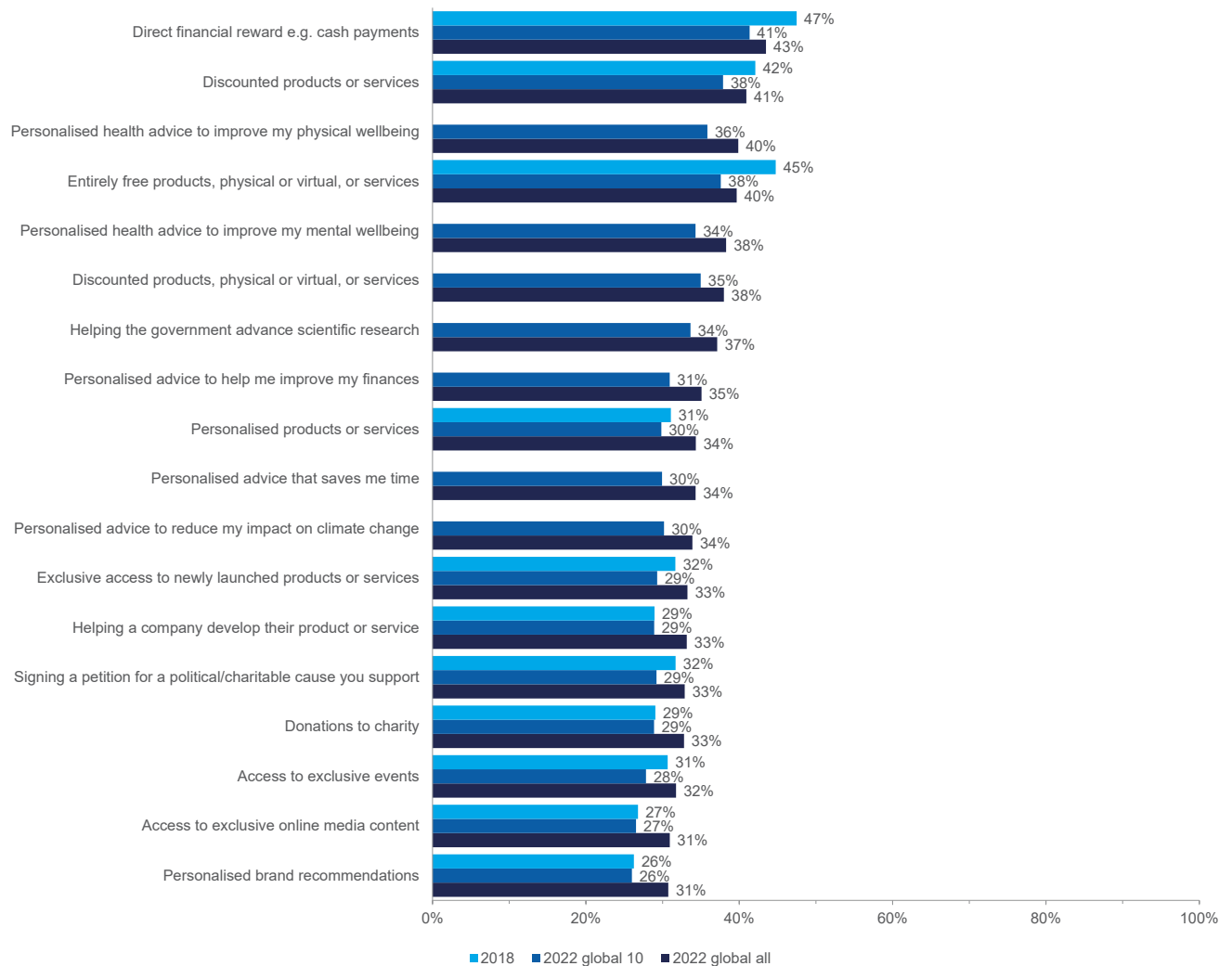
Taken together, the findings show that transparency remains a fundamental pillar that drives trust and eagerness to engage with the data ecosystem for the majority of consumers across markets and age groups.

**An array of incentivisation strategies exist to engage the global consumer**

When testing the forms of incentives that would most entice consumers to share personal information – across a wide spectrum of enhanced rewards and services – notably, there has been a broad decline in interest in the options tested between 2018 and 2022. Interestingly, while incentives linked to clear direct financial rewards remain the most popular, they have decreased in influence more than other forms of incentives. For example, the number of consumers who claim that they would be likely to exchange personal data in return for free products and services has fallen from 45% across the 10 trended markets in 2018 to 38% in 2022. Conversely, incentives linked to the personalisation of products, services and brand recommendations remain comparatively stable.

These findings suggest a possible growing apathy towards current forms of data incentivisation and, as the capitalist mindset expands across global markets, industry will have to either communicate the value of such rewards/benefits more convincingly or seek more innovative forms of data incentivisation. In addition, the findings suggest that global consumers are becoming more open to service-led incentives, that offer some form of personal enhancement, over more blunt financial rewards.

**“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**

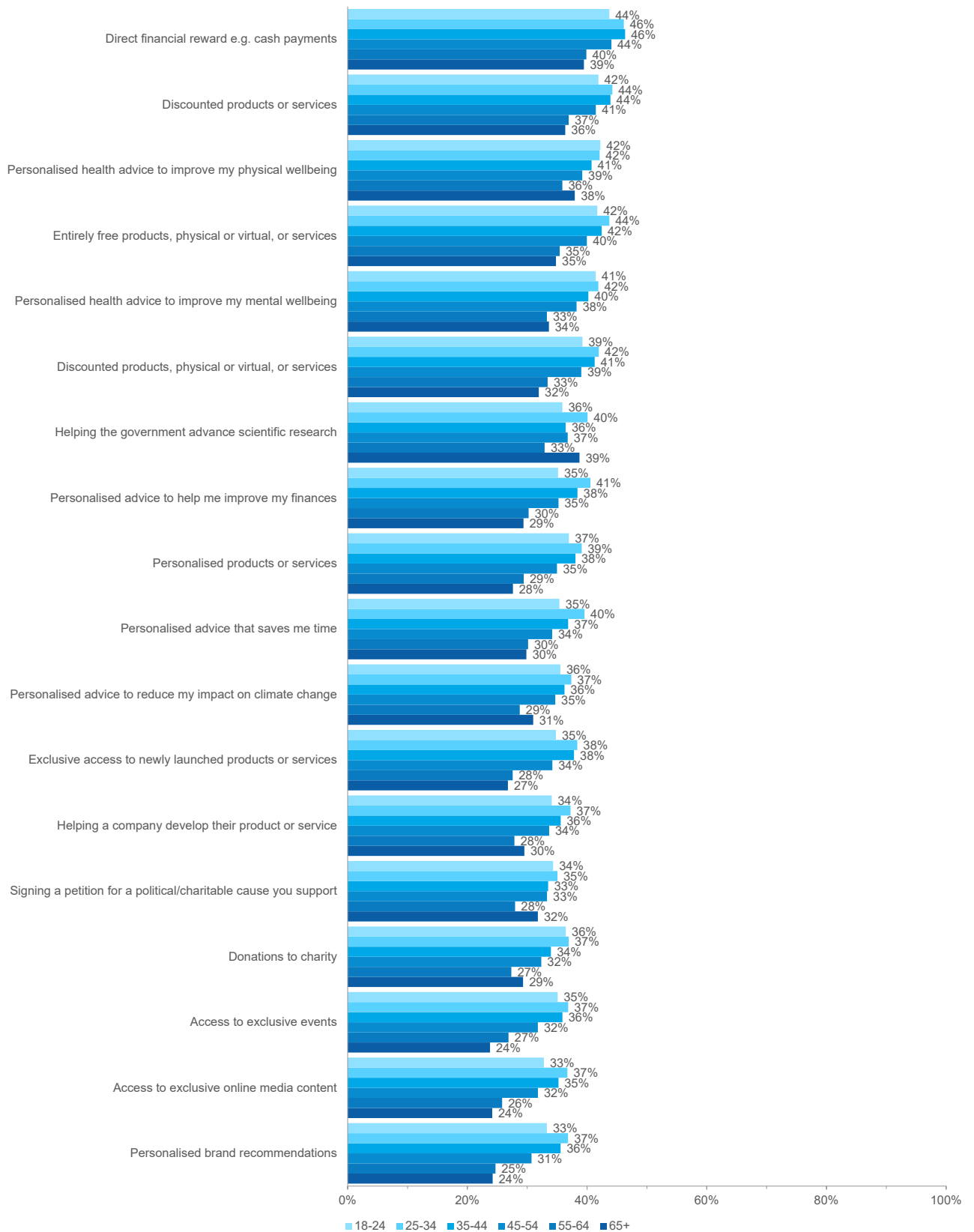


It is also noteworthy that when we compare the findings from the full 16 global markets vs. the trended 10, interest in all forms of incentivisation increases. For example, across the 10 trended markets, 38% would be likely to exchange personal information in exchange for discounted products or services, but this rises to 41% among all 16 markets. Such differences are driven by the inclusion of emerging markets that are characterised by a stronger pragmatist mindset and show stronger engagement with different forms of rewards in return for their data. For instance, while an average of 43% across the 16 markets would be likely to share their data in exchange for a direct financial reward, this rises to almost 60% in India and Mexico.

The findings further suggest that the COVID-19 pandemic has increased the value placed on data sharing incentives linked to providing healthcare advice, services or support. In 2022, receiving personalised health advice to improve physical wellbeing, ranked as the third most enticing type of incentive, only behind direct financial rewards and discounts.

The age of the consumer, however, influences how likely they are to be interested in data sharing incentives. Across almost all reward and benefit options tested, older age groups are less likely to show interest. For example, just 26% of the 65+ are likely to exchange their personal data in return for personalised products or services, compared to 39% of those aged 25-34. The notable exception is in the likelihood to share personal information to help governments advance scientific research, which is broadly consistent across age groups. Again, the COVID-19 pandemic has likely influenced such views, as data sharing aimed at promoting national scientific needs is now more widely accepted. However, it is clear that industry will need to develop better notions of value exchange with older age groups if it is to ensure holistic access to consumer data across all parts of society.

**“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, all 16 markets by age**



Despite the differences in attitude by age, there remains a clear array of incentives that brands and organisations can utilise to increase data sharing across global markets. The primary challenge will be to decode the precise forms and combinations of incentives that will most entice and reflect the needs of different segments of society.

## PART 3: GLOBAL RIGHTS AND RESPONSIBILITIES

Global consumers continue to display significant levels of autonomy and responsibility for their engagement with the data ecosystem, as well as high levels of awareness over the public discourse of data security issues and concerns. However, there is evidence of a global trend towards growing levels of expectation being placed on industry to support consumers in safeguarding their personal data security.

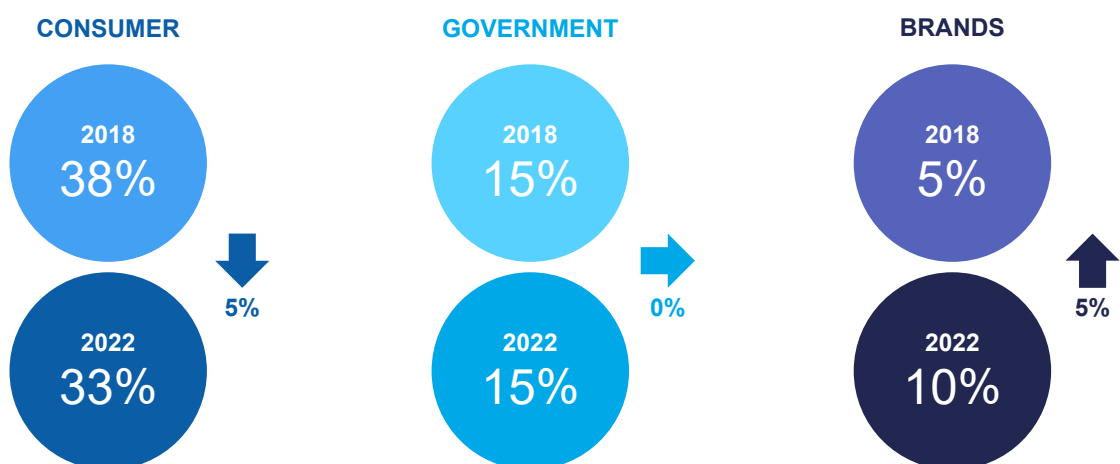
Moreover, evidence from European markets demonstrates a significant increase in awareness of data protection regulations since 2018. Such findings suggest that rising levels of regulatory awareness has been one driver of the increased levels of comfort and confidence global consumers demonstrate towards the sharing of personal information (as outlined in part 1 of this report).

However, levels of awareness towards data protection regulations vary considerably across global markets. Developing more equitable awareness and understanding of consumer data protection globally will support the continued evolution of a more empowered and engaged consumer for the future data ecosystem.

### Significant levels of individual responsibility remain, but growing expectations are placed on industry

Across the 10 trended global markets, significantly more consumers continue to believe that they themselves have ultimate responsibility for their data security. However, there has been a notable shift towards more consumers in these markets claiming that brands and organisations should have ultimate responsibility. Indeed, while a third of consumers in the 10 trended markets claim that the consumer should have ultimate responsibility, this is down from 38% in 2018. At 15%, the proportion placing responsibility with government has remained static over the previous 4 years. By contrast, the number of consumers in the 10 markets who claim that brands should have the primary responsibility has doubled from 5% in 2018 to 10% in 2022.

### “In your opinion, who should have ultimate responsibility for your data security?” % who select each option (2018 vs. 2022 for the 10 trended markets)

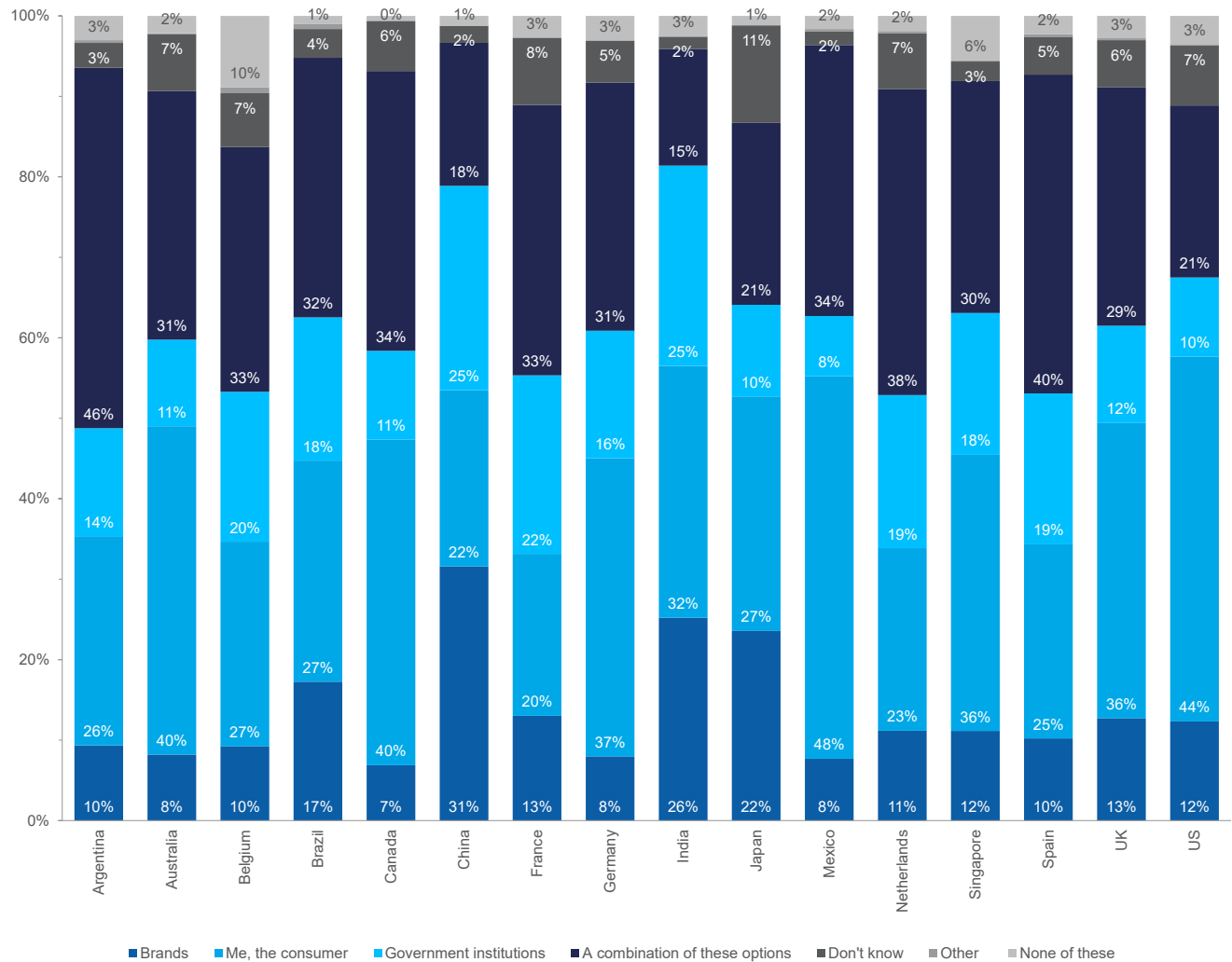


When the six new global markets are added, the proportion across all 16 markets who believe that brands should have ultimate responsibility increases even further to 14%. As the chart below outlines, such changes are explained by the relatively high proportion of consumers within some of the six new markets that place ultimate data responsibility on brands. For instance, the number of consumers in China (31%), India (26%) and Japan (22%) that claim brands should hold final responsibility for data security is significantly higher than the global average of 14%. Looking across all 16 markets, it is also notable that relatively high responsibility is placed on the

government in markets such as Belgium, China, France, India, the Netherlands and Spain. Indeed, in France, more people claim that the government should have ultimate data responsibility compared to the consumer themselves (22% vs. 20%).

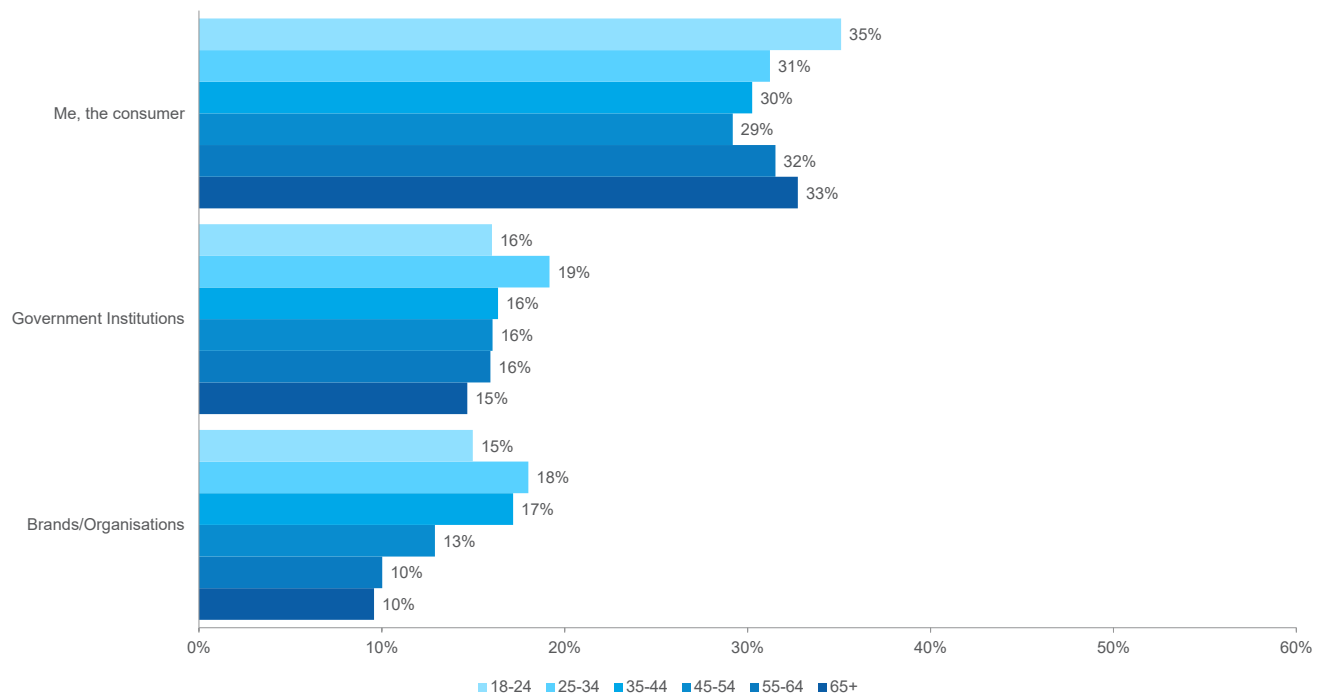
In addition, a fourth option was available to respondents to select a combination of government, brands and the consumer, for having shared responsibility for data security, which 30% of consumers across the 16 markets selected as their preferred option.

**“In your opinion, who should have ultimate responsibility for your data security?”  
% who select each option (2022 data across all 16 markets)**



When looking at how age profiles influence views towards data security responsibility, it is interesting to note that attitudes are broadly consistent across age groups. For example, consumers of all ages place more importance on individual consumer responsibility, over brands and government, with a high of 35% selecting this option among 18-24s and only falling to a low of 29% among those aged 45-54. Consumers aged 25-34 show slightly higher agreement (19%) that government should have the ultimate data security responsibility, but again this only falls to 15% among the 65+. Older age groups are less likely to claim that brands should have primary data responsibility, with 10% of consumers aged 65+ holding this view compared to a high of 18% among the 25-34s.

**“In your opinion, who should have ultimate responsibility for your data security?”  
% who select each option (2022 data across all 16 markets, by age)**

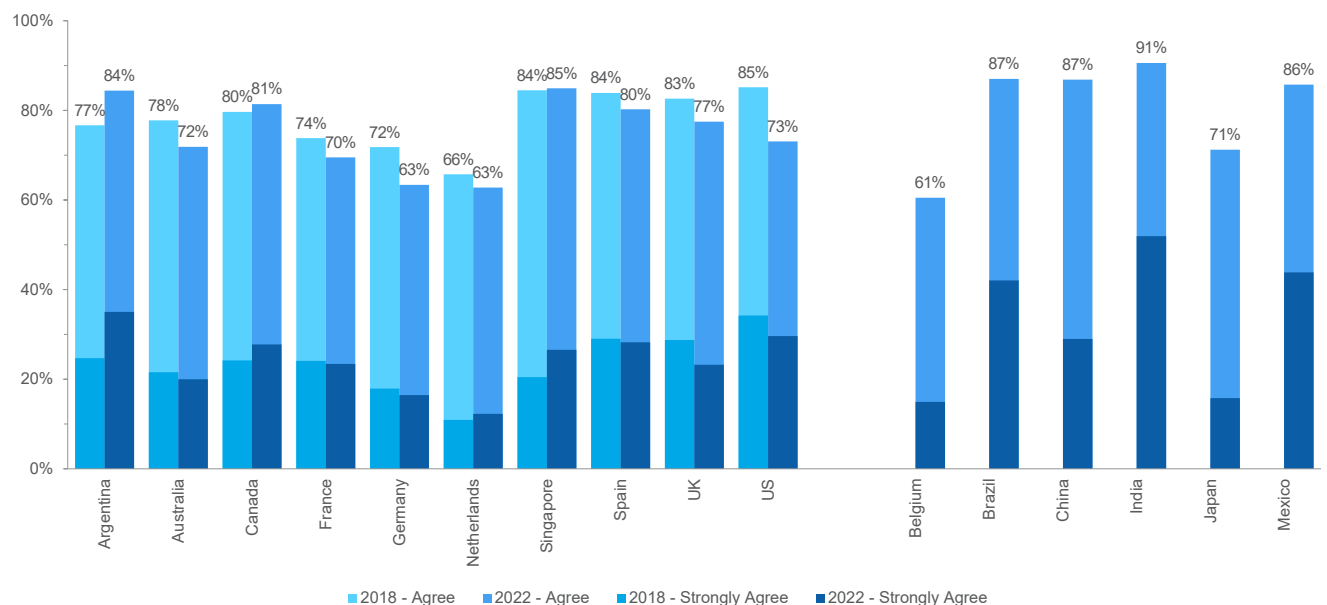


Consequently, while there has been a shift towards greater expectations from industry, global consumers continue to demonstrate significant levels of personal responsibility for their own data security.

**News headlines continue to shape public attitudes to data privacy**

In 2022, the vast majority (77%) of global consumers across all 16 markets claimed that recent news headlines about data security breaches have heightened their awareness about their personal data privacy. Agreement levels reach a high of 91% in India, but fall to just over 60% in the Netherlands, Germany and Belgium. The influence of news stories is also notably high in Latin American markets, with agreement reaching 87% in Brazil, 86% in Mexico and 84% in Argentina.

**“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 the 10 trended markets, there has been a decline in the stated influence of news headlines. In 2018, 78% across the 10 markets stated that news headlines had heightened their personal data security awareness, compared to 75% in 2022. Such a decline is particularly notable in markets such as Germany and the USA where agreement has fallen from 85% to 73% and 72% to 63% respectively. The only exceptions to the declining influence of news headlines are Canada and Singapore, which have seen a minor increase, and Argentina where agreement has grown more notably from 77% in 2018 to 84% in 2022.

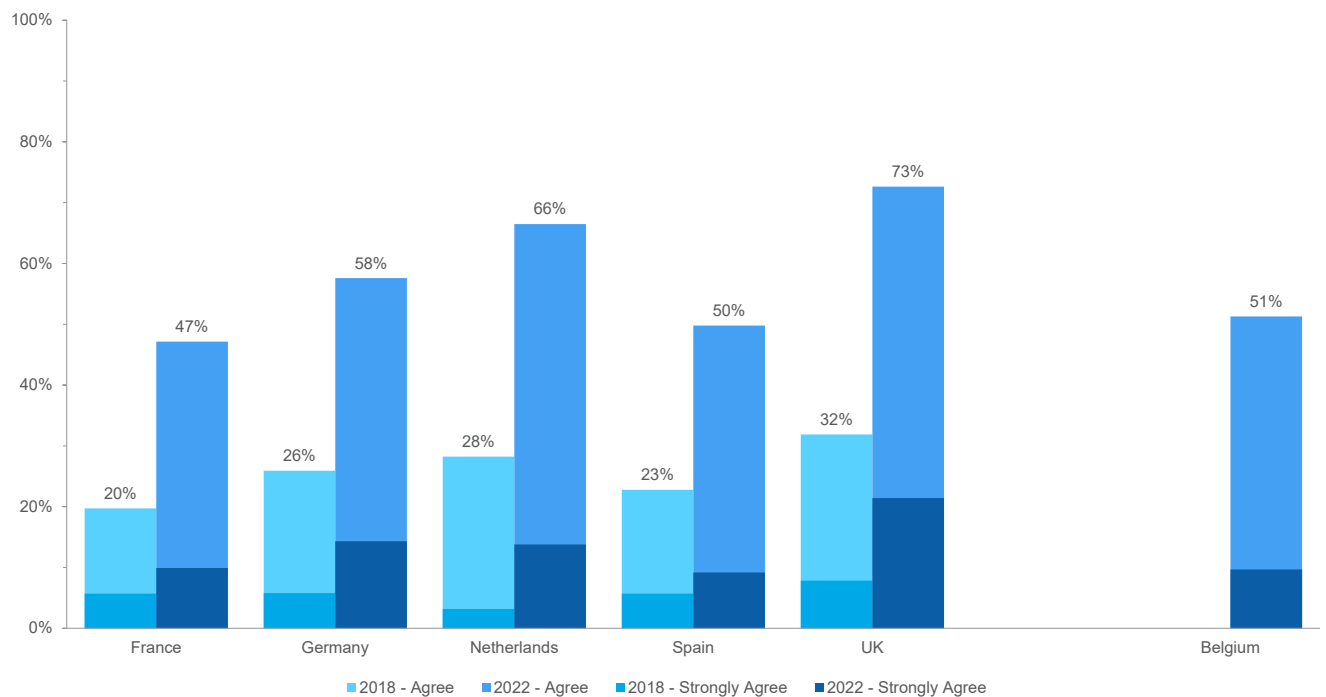
Interestingly, the stated influence of news headlines on attitudes towards data privacy is relatively consistent across age groups, reaching a high of 79% among those aged 55-64 across all 16 markets and only falling to a low of 72% among the 18-24s.

**Significant growth in awareness of GDPR in European markets**

There has been a rapid increase in public awareness of the General Data Protection Regulation (GDPR) across European markets. Indeed, awareness has more than doubled in all European markets since 2018. For example, rising from 32% in the UK in 2018 to 73% in 2022.

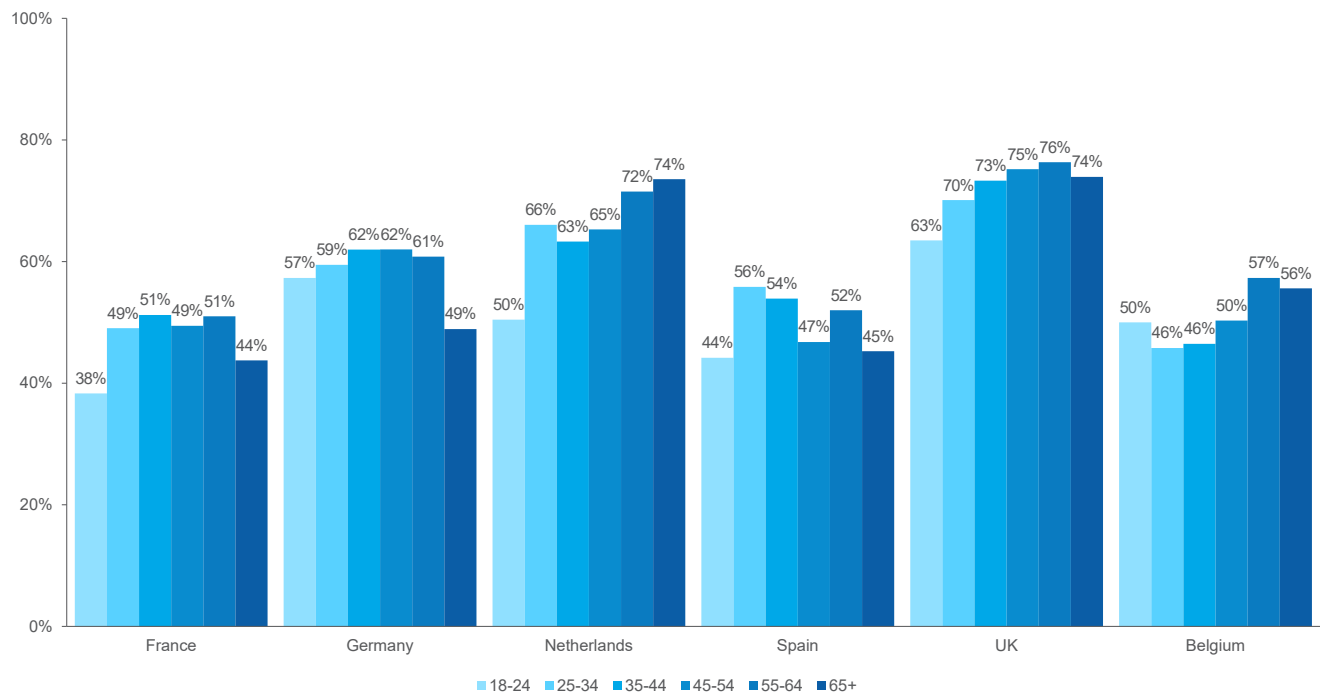
However, it should be noted that while GDPR was publicised via public media and discourse in 2017, at the time of the previous research GDPR had not yet come into force (GDPR came into force in May 2018). Moreover, awareness of GDPR also varies considerably across European markets, rising as high as 73% in the UK and 66% in the Netherlands, but falling to around half in Belgium (51%), Spain (50%) and France (47%).

**“I am aware of the General Data Protection Regulation (GDPR)”  
% who strongly agree or agree | European markets only**



Awareness of GDPR is also relatively consistent across age groups, albeit with some interesting differences between markets. For example, in the Netherlands and the UK, awareness broadly increases with age. This is most stark in the Netherlands where awareness of GDPR reaches 74% among the 65+ but falls to just 50% for 18-24s. Conversely, the opposite age effect is apparent in Germany, where awareness of GDPR is prevalent among 6 in 10 for all age groups other than the 65+, for whom it falls to just 49%.

**“I am aware of the General Data Protection Regulation (GDPR)”  
% who strongly agree or agree | European markets only (by age)**



Despite the variations across markets and age groups, there has been a clear and significant rise in public awareness of GDPR in European markets. Such findings suggest that a growing understanding of regulatory protections has helped encourage and nurture the growing sense of comfort and confidence with data sharing (as outlined in part 1 of this report).

**Awareness of national data protection regulations varies outside of Europe**

Looking across the non-European markets, there is clear variation in public awareness of national data protection regulations. In 2022, we tested the awareness of a specific data protection regulation in Argentina, Canada, Japan and Singapore.

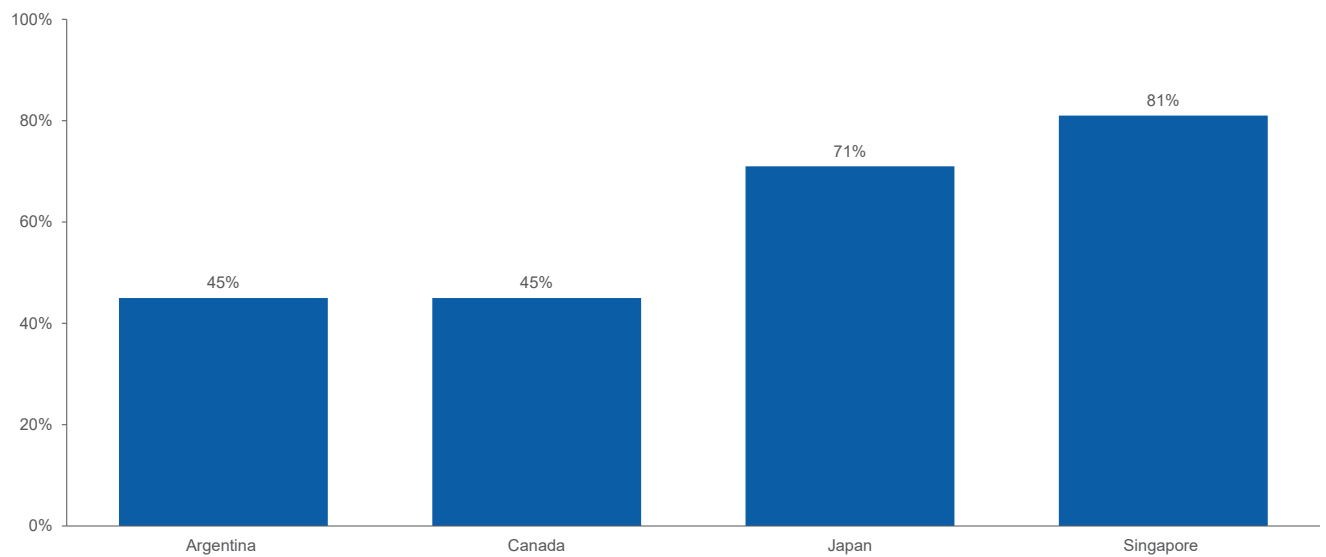
The regulations tested were:

- **Argentina** – Argentine National Personal Data Protection Law
- **Canada** – Personal Information Protection and Electronic Documents Act (PIPEDA)
- **Japan** – Act on the Protection of Personal Information (APPI)
- **Singapore** – Personal Data Protection Act (PDPA)

As outlined in the chart below, a high majority of consumers in Singapore and Japan indicated an awareness of their national data protection regulation – reaching 81% in Singapore and 71% in Japan. However, awareness was lower in Argentina and Canada, where just 45% of the public claimed to be aware of their national regulation. The relatively low levels of awareness shown in Argentina and Canada could be influenced by the age of their respective data protection legislation (both came into force in 2000).

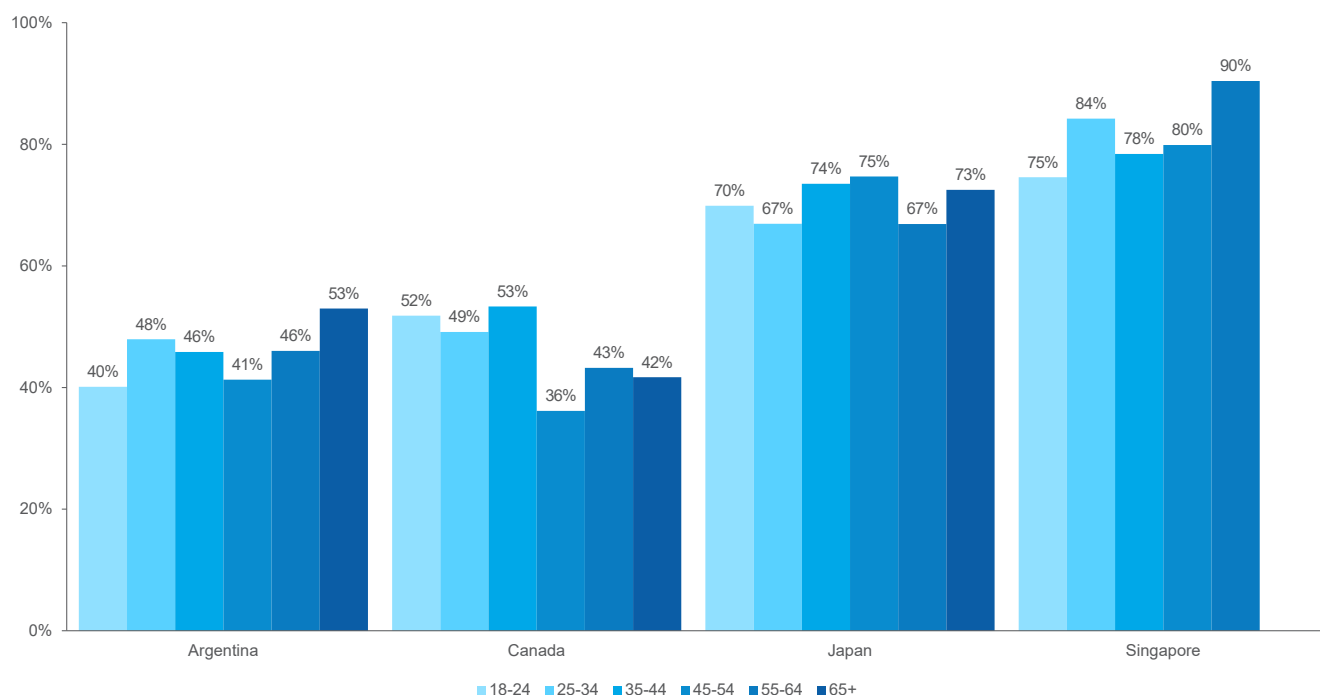


**“I am aware of the (relevant local regulation)” % who strongly agree or agree**

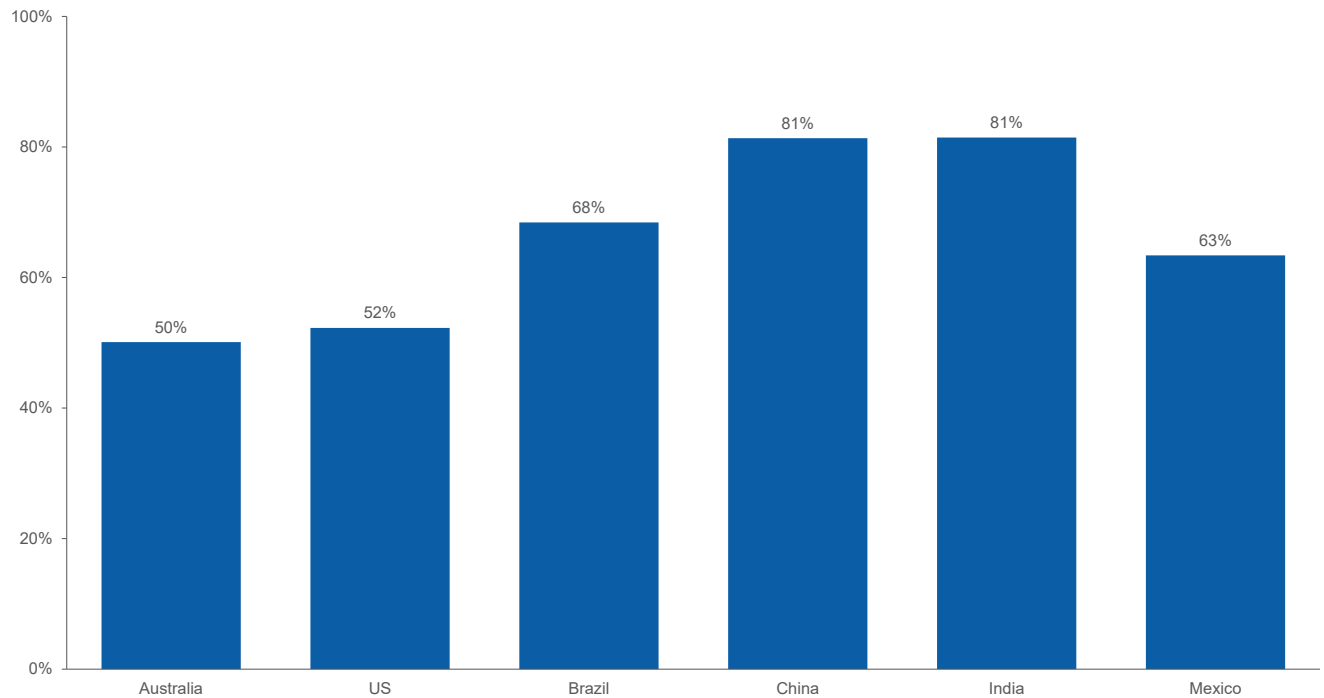


While awareness does not change drastically by age, it is notable that in Canada awareness is higher among older age groups, whereas the reverse is true in Argentina and Singapore. Indeed, regulatory awareness in Canada reaches 52% among those aged 18-24 but falls to 36% for 45-54s. Conversely, in Argentina, regulatory awareness is highest among the 65+ at 53% but falls to 40% among those aged 18-24.

**“I am aware of the (relevant local regulation)” % who strongly agree or agree, by age**



For the remaining global markets, where there was a less notable or specific regulation to test, respondents were asked the extent to which they are generally aware of data protection regulations in their country. Agreement with this broader statement indicates high levels of awareness in China and India, where 81% claim to be aware of data protection regulations in their country. This compares to around 2 in 3 in Brazil and Mexico. In Australia and the USA, awareness falls to 50% and 52% respectively.

**“I am aware of the data protection regulations in my country”****How much do you agree or disagree with the following statements? | % who agree**

While there have been clear improvements in the levels of public awareness of data protection regulations in the European markets where trended data is available, there remains a wide variation of awareness levels across global markets. Moreover, awareness of such regulations is not influenced significantly by age profiles but is much more clearly determined by a market-by-market distinction. Building more widespread public awareness, more consistently across global markets, will be an important step to continue to nurture the wider trends presented in this report towards a more empowered and confident consumer landscape.

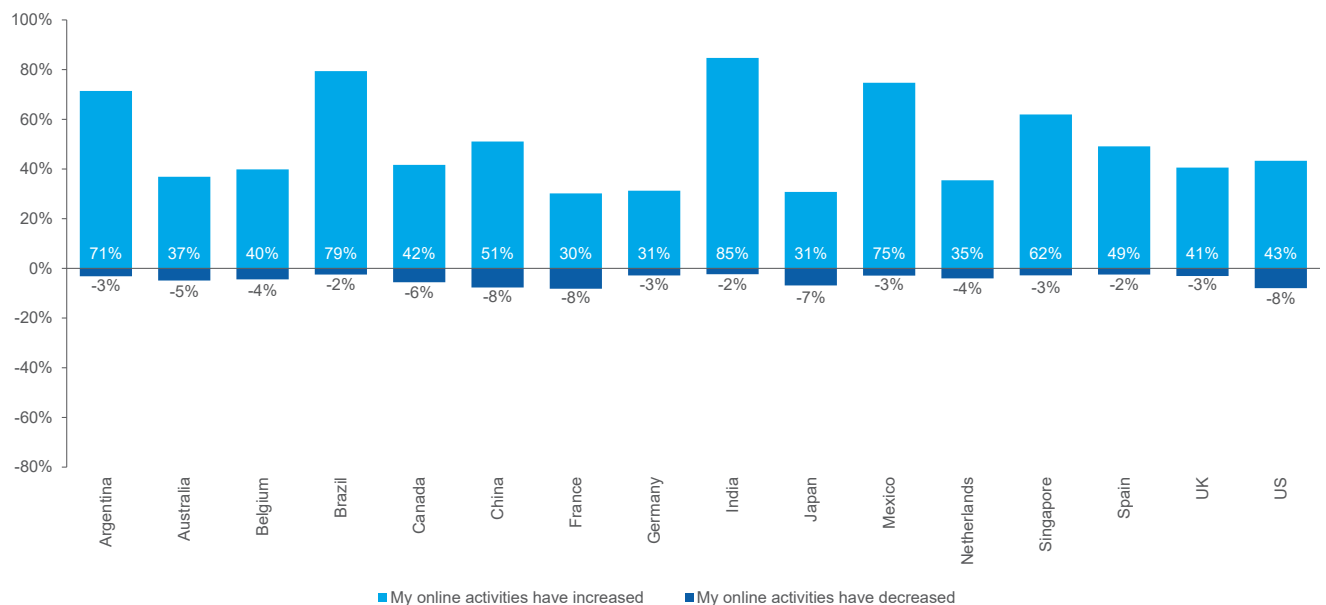
# PART 4: EMERGING THEMES FOR THE DATA ECOSYSTEM IN 2022

In the final part of this report, we explore new and emerging themes shaping or impacting the future data ecosystem that have been tested for the first time in 2022, from the impact of COVID-19 on data attitudes to the role of information sharing in facilitating a more diverse and competitive commercial landscape in the 2020s.

## COVID-19 has accelerated engagement with the digital world, but has impacted attitudes toward data sharing differently across age groups

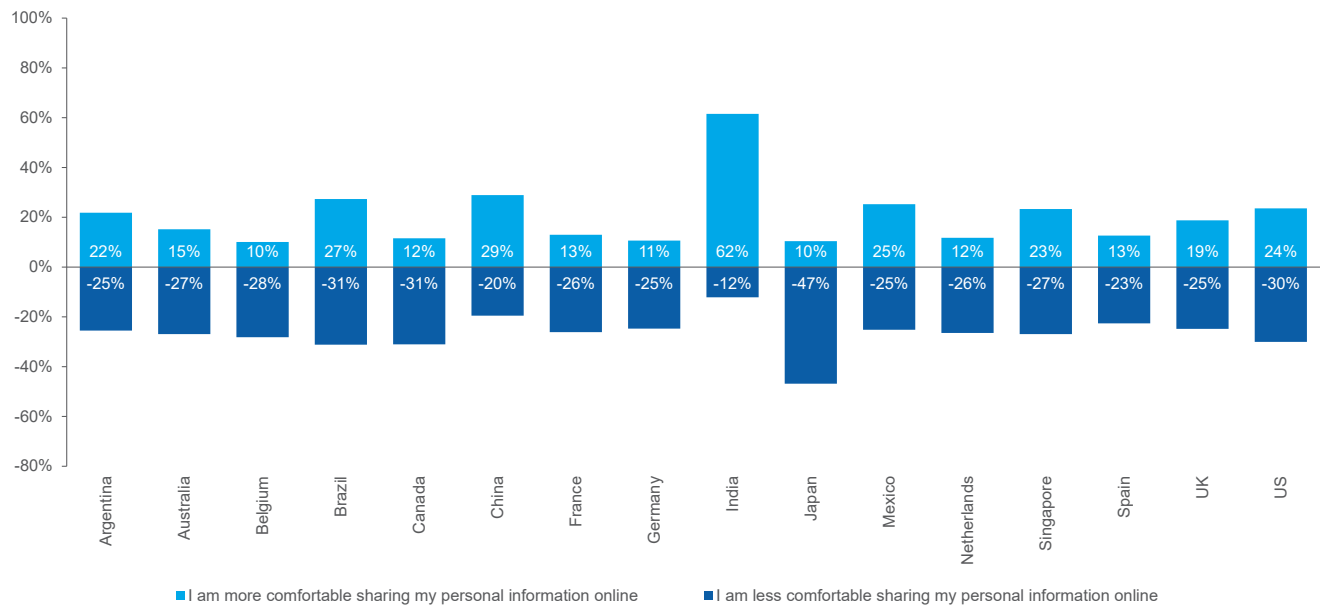
As the chart below outlines, the COVID-19 pandemic has significantly increased the level of online activities of global consumers. Vastly higher numbers across all markets claim that the pandemic has seen their online activity levels increase compared to the very small minority who claim these have decreased. Indeed, in India, 84% claim their online activities have increased as a result of the pandemic, while such stated behavioural change is also high in markets such as Argentina (71%), Brazil (79%) and Mexico (74%). Even in France, where we see the lowest stated rise in online activities, 30% still claim that their levels have increased compared to 8% who say they have decreased.

### How have your online activities changed, if at all, since before the start of the COVID-19 pandemic?



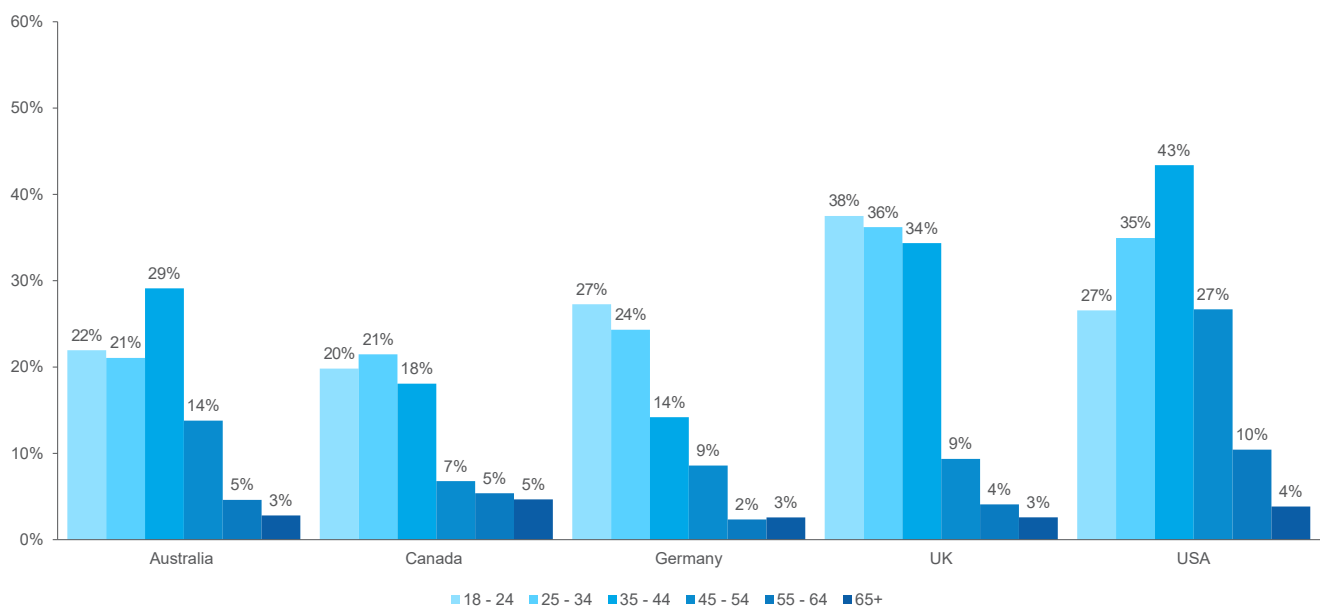
Changing living patterns during the COVID-19 pandemic – where how people work, shop and socialise have all shifted to more digital channels – have clearly accelerated global public engagement with the digital world. As a result, more consumers, especially older ones, will have likely engaged more with the exchange of data as a direct result. When specifically asked about the extent to which the COVID-19 pandemic has increased or decreased comfort levels with sharing data online, it is interesting to note that more consumers say that it has had a negative effect in all markets other than China and India. Moreover, in markets such as Belgium, Canada, Japan, and Germany, this impact is particularly stark. For example, in Japan 47% claim that the pandemic has made them less comfortable with sharing their personal data (compared to 11% who claim that it has made them more comfortable). The notable exception to such findings is India, where 62% claim to be more comfortable and just 12% claim to be less comfortable.

### How comfortable are you sharing your personal information online now compared to before the start of the COVID-19 pandemic?



While on the surface such findings suggest that, as more consumers have engaged with data sharing, this had led to a concomitant decrease in comfort with data sharing, changes in such attitudes by age indicate that the COVID-19 impact has been polarised across younger and older consumers. As the chart below demonstrates, younger age profiles are far more likely to state that the pandemic has made them more comfortable with sharing data while older consumers are much more likely to claim the opposite. For example, in Germany and the UK, 27% and 38% of 18-24s respectively claim that COVID-19 has made them more comfortable with sharing personal information online. This compares to just 3% of the 65+ in both markets.

### How comfortable are you sharing your personal information online now compared to before the start of the COVID-19 pandemic? % selecting MORE comfortable, by age



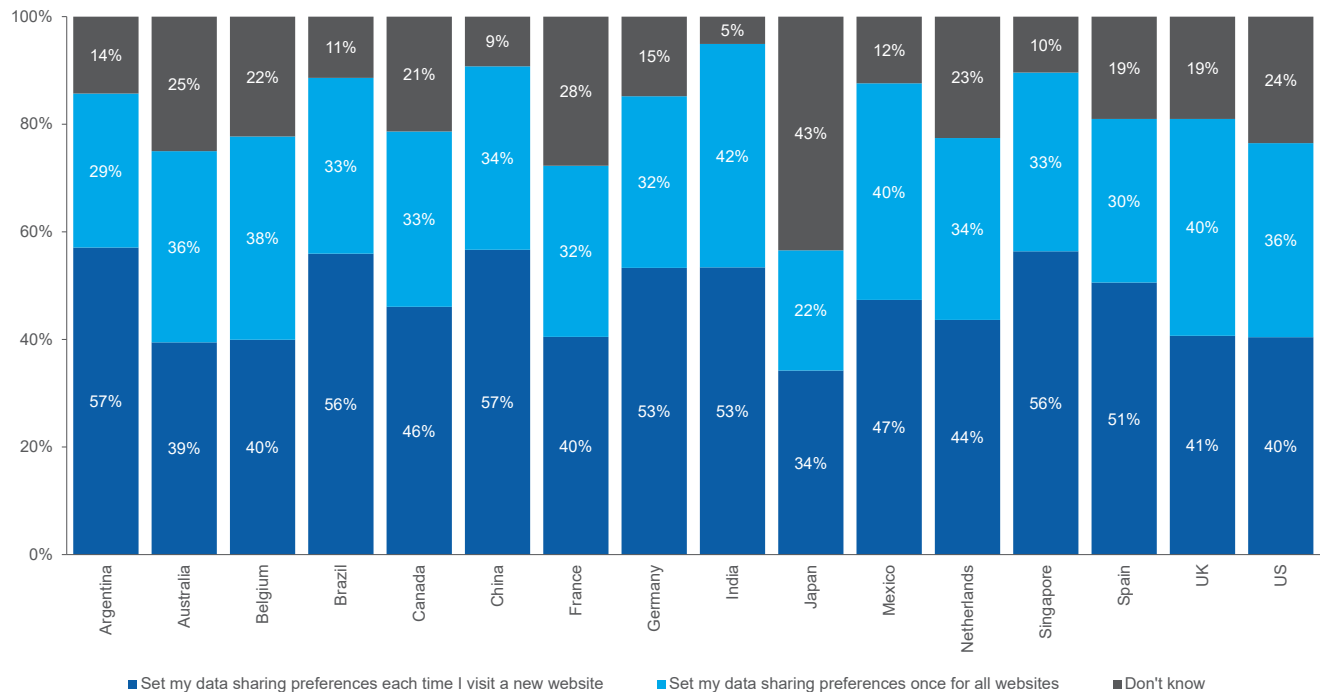
The accelerated levels of digital engagement necessitated by the pandemic have resulted in many consumer groups, particular older age segments, having to use digital channels and services more frequently (or even for the first time). As a result, the findings presented here suggest that the impact of increased digital behaviours throughout the pandemic has led to growing levels of discomfort with older age groups across many global markets. Such findings

are consistent with the research outlined throughout this report which consistently highlights age as a key influencing factor in levels of confidence and comfort with interacting with the data ecosystem. Increased efforts to capitalise on wider societal engagement with the digital world, via initiatives aimed at increasing comfort with data sharing among older generations, will optimise wider consumer engagement with data exchange in the 2020s.

**Global consumers demonstrate polarised views towards setting data sharing preferences online**

When it comes to setting data sharing preferences when online, more global consumers (47%) claim that they would prefer to set such preferences each time they visit a website, compared to 34% who would rather set their preferences once for all websites. The desire to set preferences for each website visited is particularly high in Argentina (57%), Brazil (56%), China (57%) and Singapore (56%). While this approach to preference setting is the most popular in all markets, the gap between the two options narrows considerably in markets such as Belgium and the UK. For example, in the UK, 41% would prefer to set their preferences each time they visit a website vs. 40% who would rather set their preferences for all just once.

**Which of the following ways of setting your data sharing preferences would you prefer?**

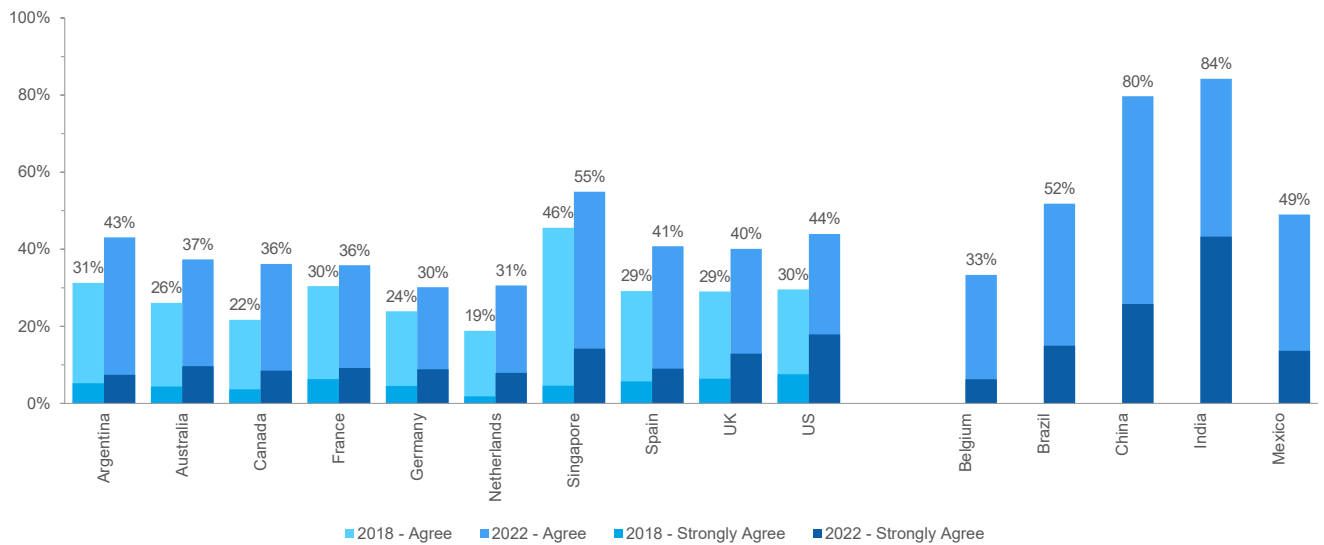


Moreover, younger consumers show a relatively higher interest in setting their data preferences once for all websites. In fact, in Belgium and the UK among those aged 18-34, this is the most popular option.

**Increased interest levels in B2B data sharing for service and product enhancements**

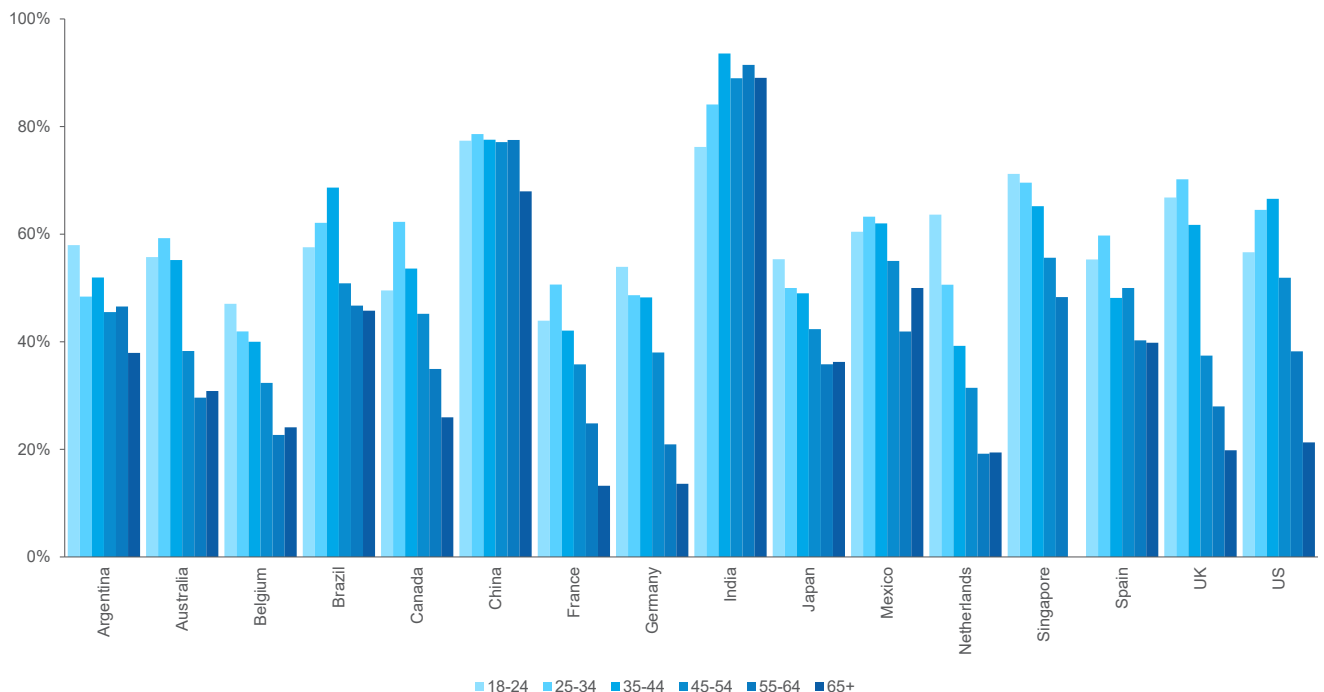
Across the 10 trended global markets there are a growing number of consumers who would be happy for businesses to share their personal information with other businesses in order to deliver more personalised services and products. Agreement with this notion has risen from 29% in 2018 to 39% in 2022. Across the new markets surveyed in 2022, China and India show very high levels of agreement at 84% and 80% respectively.

**“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**



Across the majority of markets, younger consumers show a higher level of interest in B2B data sharing, with India being a notable exception. For example, the proportion of consumers in Germany and the Netherlands who would be happy with a selection of their favoured companies sharing their personal information with each other in return for a more personalised service, reaches 53% and 63% respectively among the 18-24s, but falls to 14% and 19% for the 65+.

**“I would be happy for a selection of my favourite companies to share my personal information with each other to give me more personalised services and experiences” | % who agree by age**

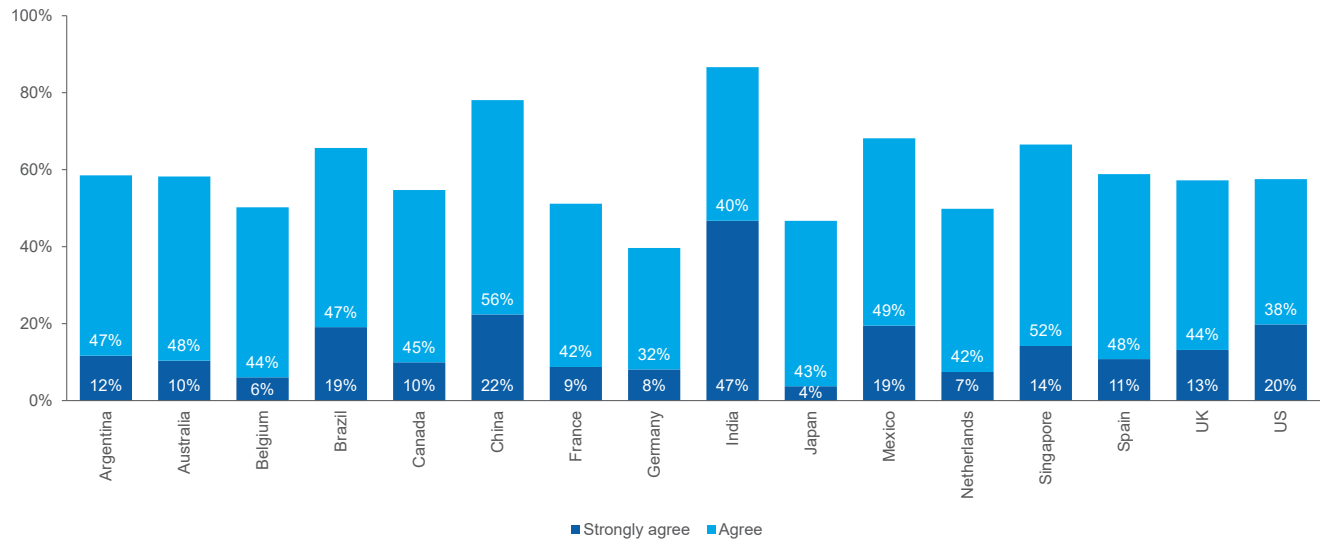


The increasing levels of interest shown in B2B data sharing should incentivise wider industry innovation in this space, seeking to develop more holistic and sophisticated data sets that can be utilised to better meet growing consumer expectations for improved levels of product, service and marketing as a result of their engagement with data sharing.

**High awareness of the role of data sharing in helping organisations respond better to the needs of all parts of society**

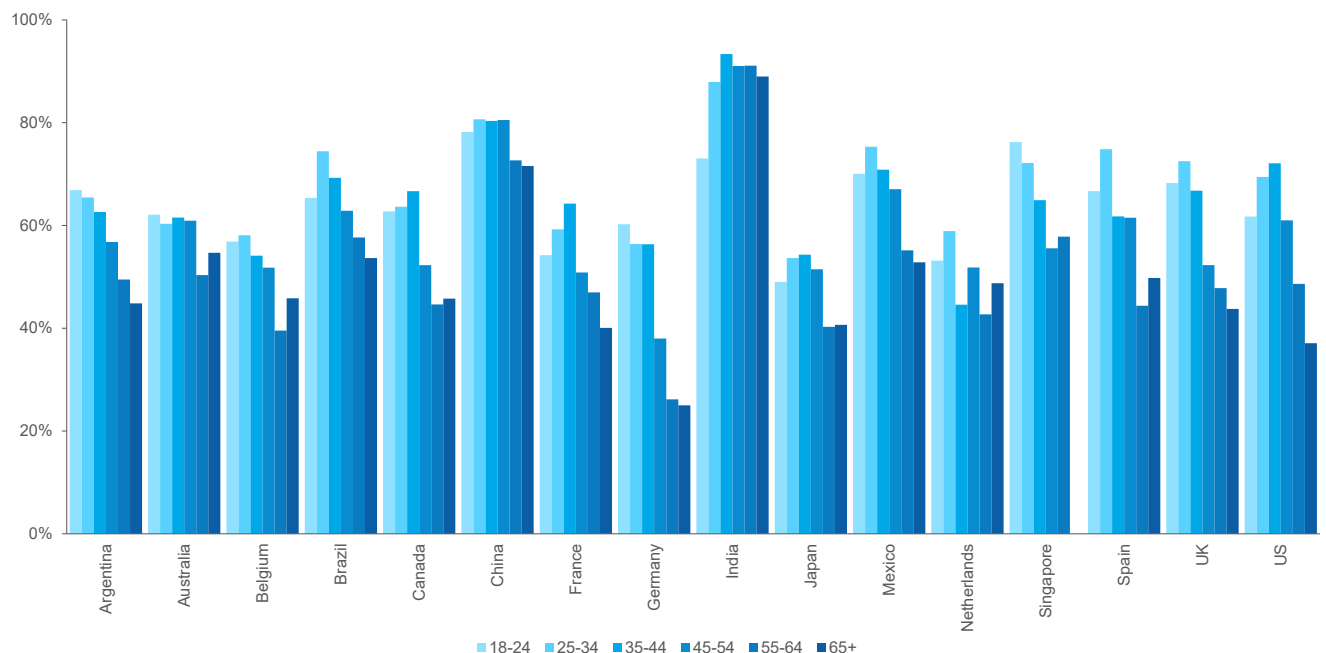
Almost 6 in 10 (59%) of consumers across the 16 global markets agree that the sharing of personal information helps ensure that organisations can better meet the needs of a diverse society, by better understanding the attitudes and wants of a wider range of groups and identities. Such agreement reaches a high of 87% in India and falls to a low of 40% in Germany.

**“People sharing their personal information with organisations helps organisations develop a better understanding of different types of people in society”**  
**How much do you agree or disagree with the following statements? | % who agree**



Across the majority of markets, agreement with the role of data in driving more diverse offerings from brands and organisations is higher among younger age groups. For example, 67% of 18-24s in Spain agree with this sentiment compared to 44% of the 55-64s. Similarly, in Canada, agreement reaches 63% among the 18-24s but falls to 46% for the 65+.

**“People sharing their personal information with organisations helps organisations develop a better understanding of different types of people in society”**  
**How much do you agree or disagree with the following statements? | % who agree, by age**

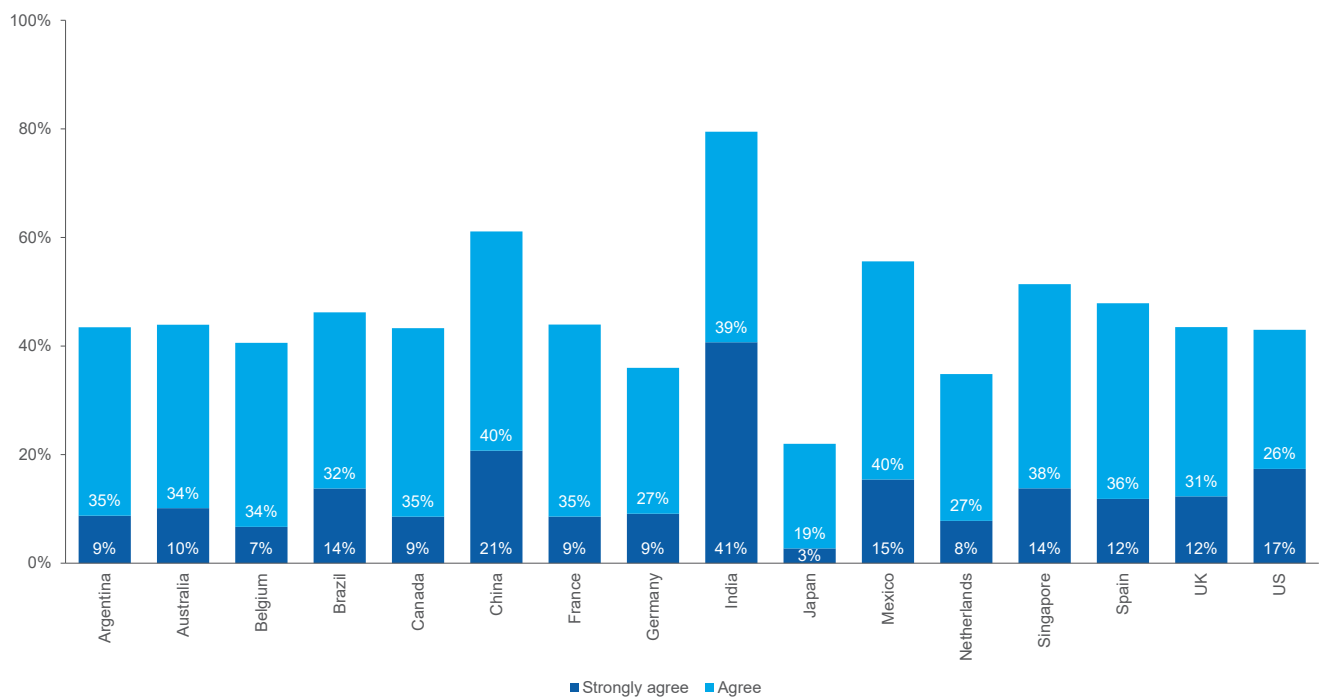


As the use of data becomes more central to the business practices of brands worldwide, restricted access to the same levels of data across different groups in society will risk marginalised groups emerging who are less well understood and catered to by global brands. The role that data sharing can play in encouraging more diverse and inclusive commercial offerings/services will be an effective message to entice wider engagement with the future data ecosystem.

**Global consumers show a willingness to share personal data to drive the competitiveness of smaller businesses, particularly younger age groups**

Just under half (46%) of global consumers state that they would be more likely to share personal information to provide a competitive advantage to smaller companies over larger ones. Agreement only climbs to a majority of consumers in China, India, Mexico and Singapore and falls to a low of 22% in Japan.

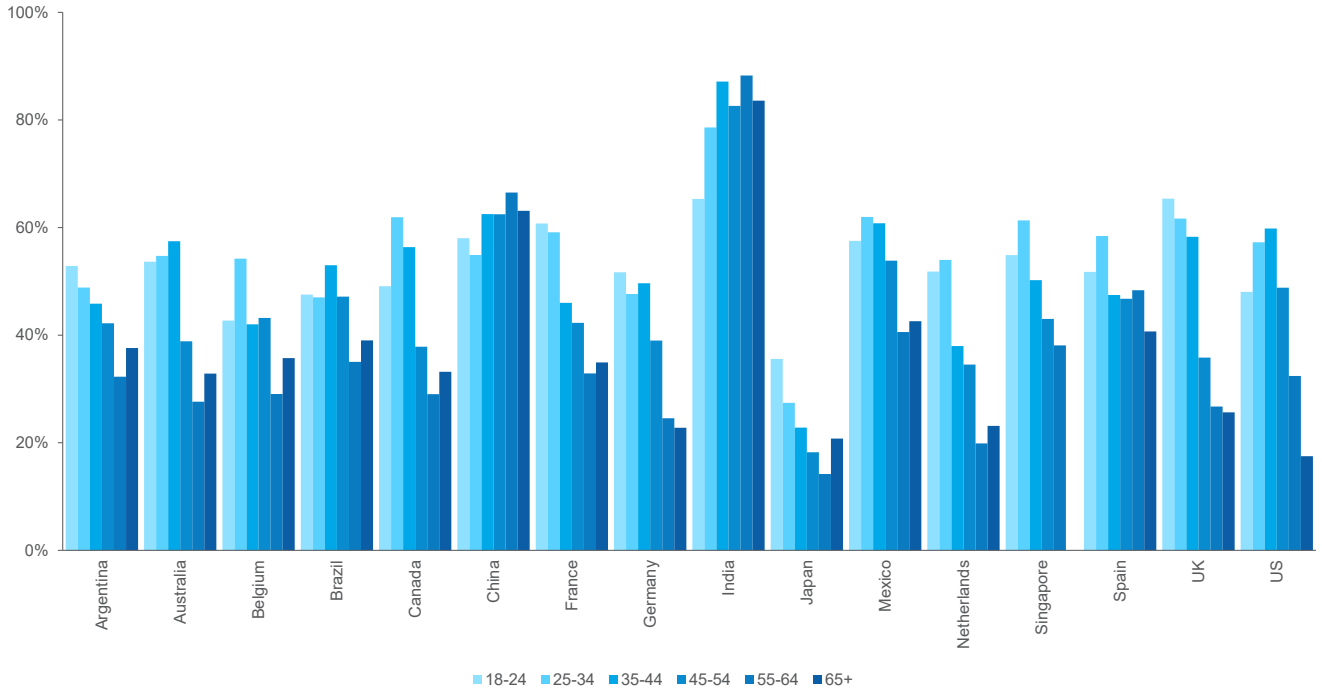
**“I don’t mind sharing personal information with smaller companies if it helps give them a competitive advantage over larger companies”**  
**How much do you agree or disagree with the following statements? | % who agree**



However, within markets where there is relatively low agreement, significantly higher numbers of younger consumers claim they would be more likely to exchange data to support smaller businesses. For example, among the 18-34s, agreement reaches 60% in France and 64% in the UK.



**“I don’t mind sharing personal information with smaller companies if it helps give them a competitive advantage over larger companies”**  
**How much do you agree or disagree with the following statements? | % who agree, by age**



Consequently, the role that data sharing can play in driving more competitive economies by providing more equal access to customer intelligence for smaller businesses, will be a compelling reason for many consumers to share personal information in the 2020s.

# METHODOLOGY

In December 2021, Foresight Factory conducted, on behalf of Acxiom and the GDMA, an online survey of a minimum 1,000\* sample of respondents aged 18+\*\* across 16 global markets exploring public attitudes towards privacy and data exchange. The markets included in the survey are Argentina, Australia, Belgium, Brazil, Canada, China, France, Germany, India, Japan, Mexico, the Netherlands, Singapore, Spain, the UK and the USA. In total, 20,626 respondents were surveyed across the 16 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 the UK, the USA, China and India

\*\*18-64 in Singapore

# ABOUT ACXIOM

Acxiom is a customer intelligence company that provides data-driven solutions to enable the world's best marketers to better understand their customers to create better experiences and business growth. A leader in customer data management, identity, and the ethical use of data for more than 50 years, Acxiom now helps thousands of clients and partners around the globe work together to create millions of better customer experiences, every day. Acxiom is a registered trademark of Acxiom LLC and is part of The Interpublic Group of Companies, Inc. (IPG).

For more information, visit [acxiom.com](https://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-eight 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 [globaldma.com](http://globaldma.com)



## Asia-Pacific

- ADMA (Australia)
- DDA (Hong Kong)
- DMAA (India)
- DMAS (Singapore)
- DMJ (Japan)
- MA (New Zealand)
- TDMA (Thailand)

## Europe

- ANFO (Norway)
- BAM (Belgium)
- CMA (Hungary)
- DDMA (Denmark)
- DDMA (The Netherlands)
- DDV (Germany)
- DMA (United Kingdom)
- DMA France (France)
- DMA Italia (Italy)
- FEDMA (Europe)
- ICEMD (Spain)
- SWEDMA (Sweden)

## Middle East & Africa

- DMASA (South Africa)
- DPID (Turkey)
- MENA (Middle East)

## North America

- ANA (United States)
- CMA (Canada)
- Directa (Mexico)

## South America

- ABEMD (Brazil)
- AMD (Chile)
- DMA Argentina (Argentina)

# 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 [foresightfactory.co](https://foresightfactory.co)

