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Consumer perspectives on data privacy

Wave 2

November 2021

Introducing Accent

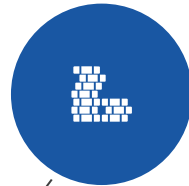


Introducing Accent



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Over 30 years experience, recognised experts in research in the regulatorily market



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Integrated, full service and independent market research agency

TRUSTED PARTNER

Multi-disciplinary senior team providing full service qual and quant research

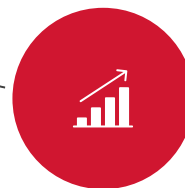
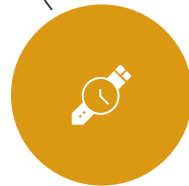


Accent

In an increasingly cookie-cutter world, we approach every brief with a fresh perspective
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BEYOND RESEARCH

Partnering with statisticians, modellers, economists, behavioural economists



FRESH AND INNOVATIVE THINKING

Using ground breaking and award winning quantitative and qualitative approaches

Background & Methodology overview

Wave 1

Background: Data Privacy remains an area of concern for consumers and companies alike. Accent began tracking consumer attitudes and awareness towards privacy with some self-funded research at the end of February 2020 to understand consumers' willingness to share different types of personal data, the trade-offs they're prepared to make and to explore how different market sectors and brands fare in terms of trustworthiness.

Methodology:

Quantitative stage:

- Nat rep survey of 1000 GB Adults
- Fieldwork conducted using an online panel (Dynata)
- Field dates: 26 February to 06 March 2020

Wave 2

Background: Wave 1 was run just prior to the outbreak of COVID-19 so this wave (wave 2) also tracks how living through the pandemic has shaped attitudes and behaviours towards online data privacy.

For this wave Accent have partnered with ICO and OFWAT, each of whom contributed 10 new questions to the online survey.

There is also a qualitative element: we carried out 3 focus groups with different levels of online data privacy engaged UK consumers, one for high, medium and low levels of engagement.

The ICO contributed 15 minutes' worth of discussion to the focus group topic guides.

Methodology:

Quantitative stage:

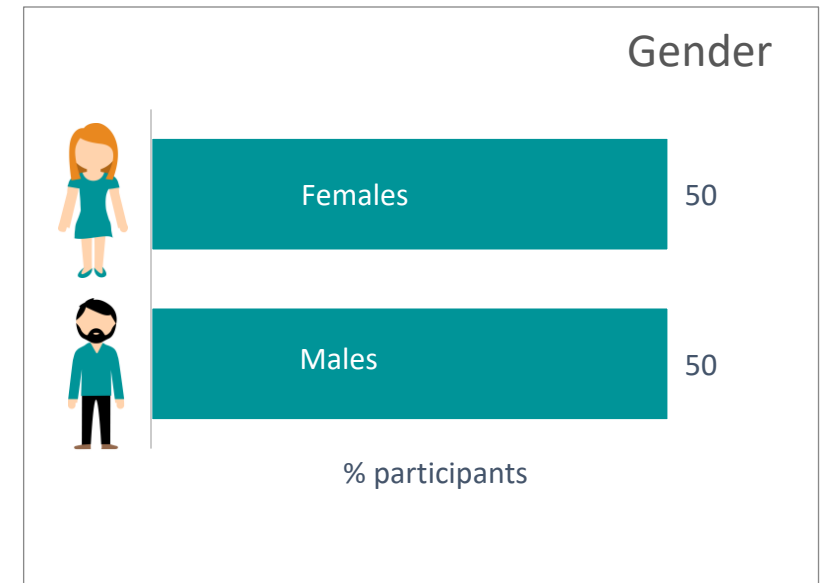
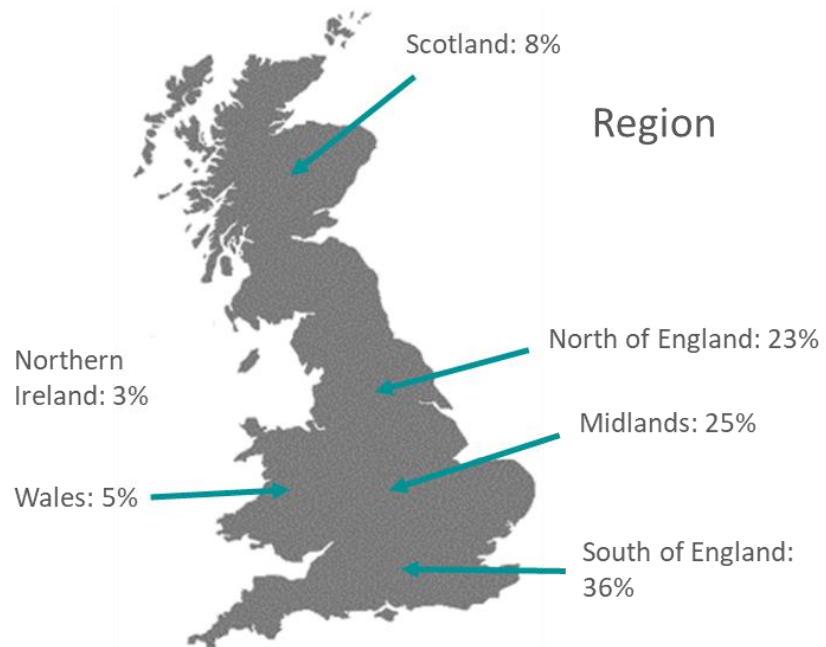
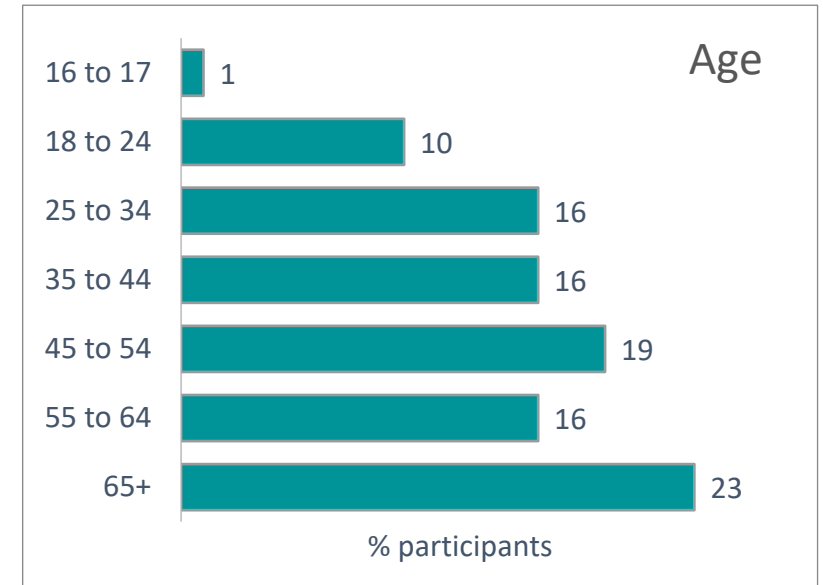
- Nat rep survey of 1001 UK Adults (given the onboarding of the ICO as research partner)
- Fieldwork conducted using an online panel (Dynata)
- 15 October to 28 October 2021

Qualitative Stage: 3 x 90 minute groups with 6 participants each. Mixed age & gender. Groups defined by level of engagement with online data privacy.

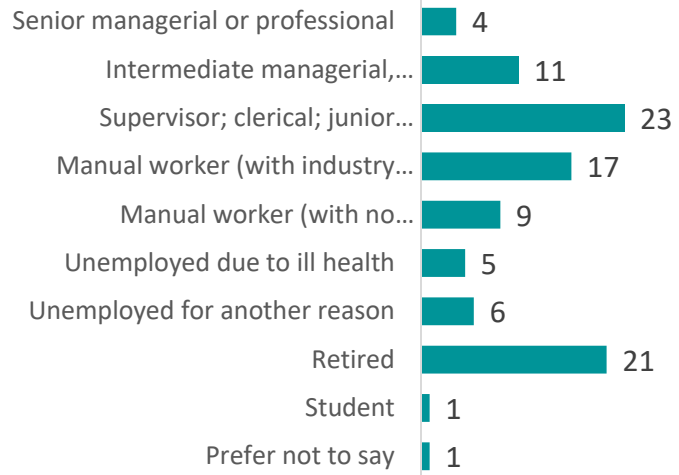
About the sample

Results for neither wave were weighted as achieved samples were nationally representative by age, gender, SEG and region. The quotas were met in both waves of the research.

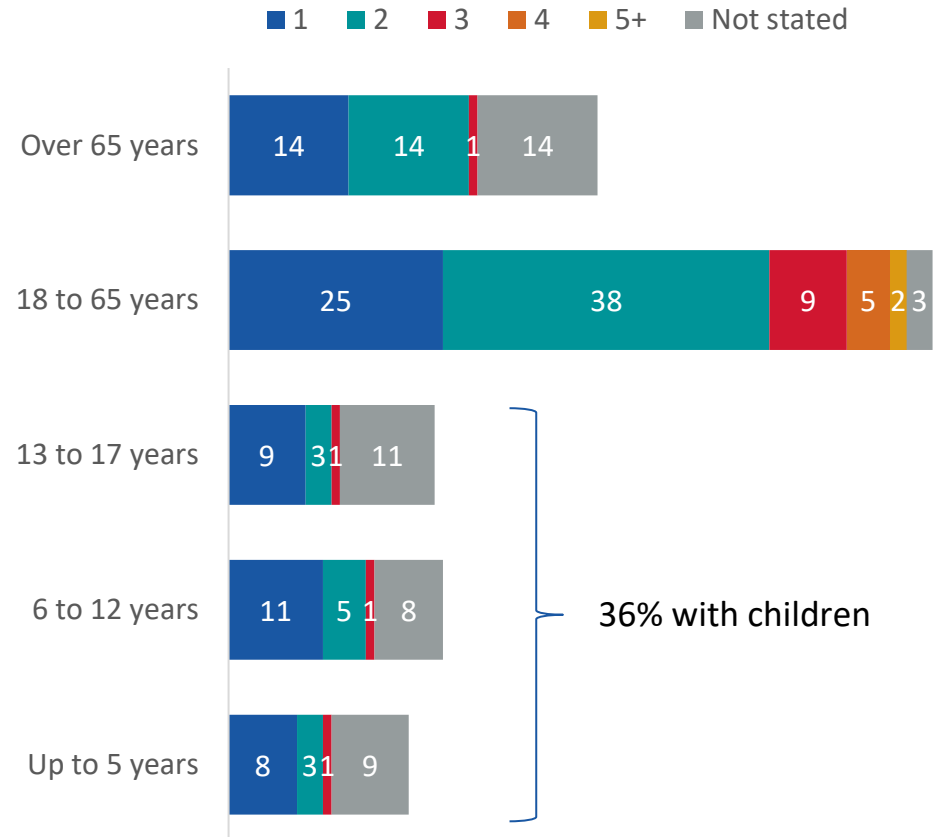
Where possible, we have drawn out significant differences throughout the presentation based on demographics. Results are based on two-sided tests with significance level .05.



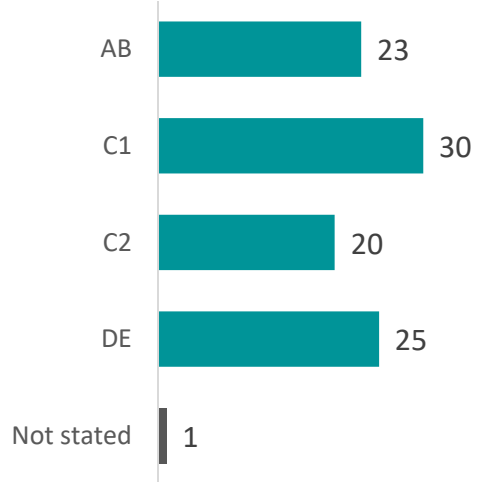
Occupation



Ages in the household



SEG



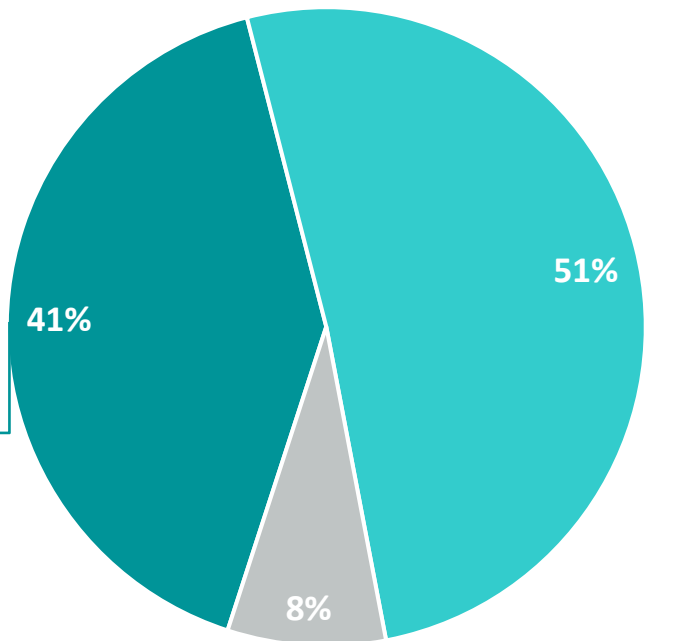
Charts show % of participants

Privacy insights

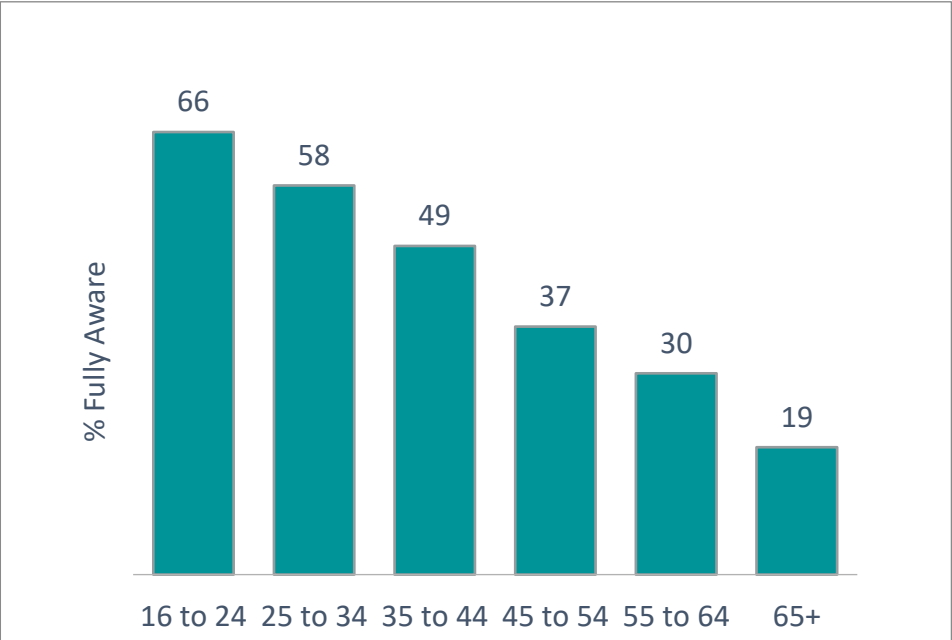


More than half (59%) continue to say they are not fully aware of their choices around data sharing online, relatively consistent with pre Covid levels (62%)

Q9. To what extent are you aware of the choices around the levels of data sharing and types of permission companies have to ask you for?




Less than full awareness 59%



Awareness around choice of data sharing is likely to decrease with age

Wave 1
62% partly or not aware at all

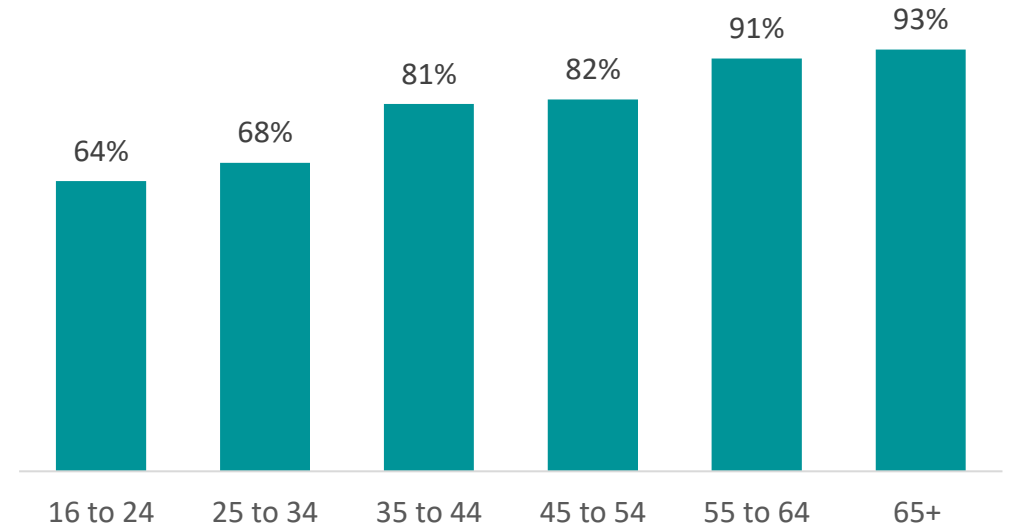
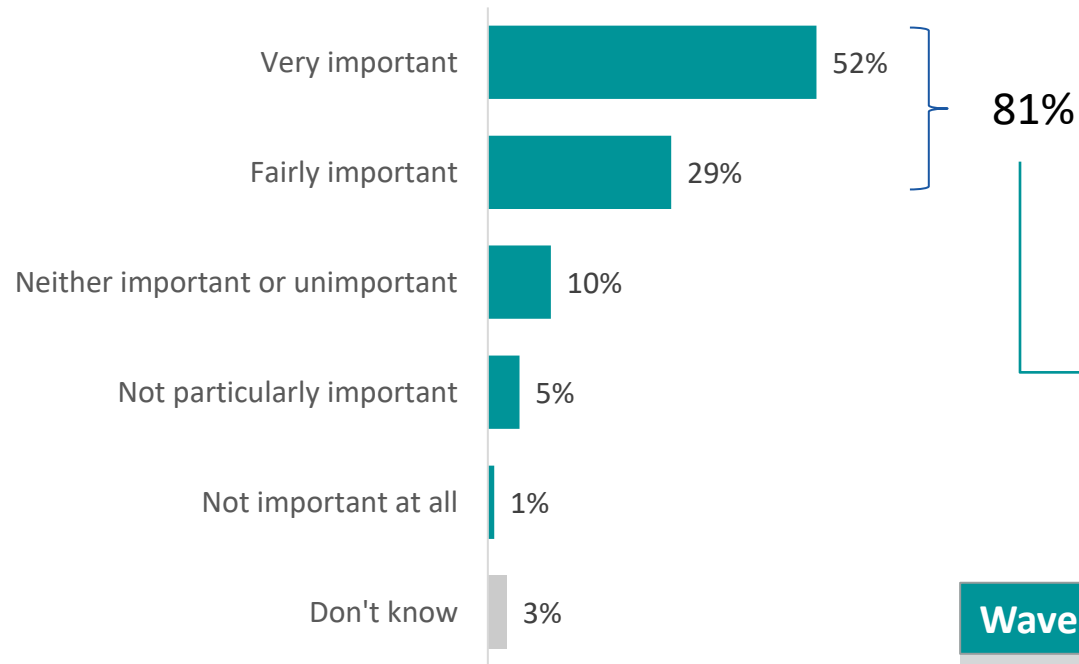
Though this is only up 2% from wave 1. Female full awareness has gone up 4% in this wave.



■ Fully aware ■ Partly aware ■ Not aware at all

81% feel its important they have opt-outs, a slight decline from pre Covid levels (89%)

Q11. How important do you feel it is that consumers are given options to opt in or out of providing access to their data?

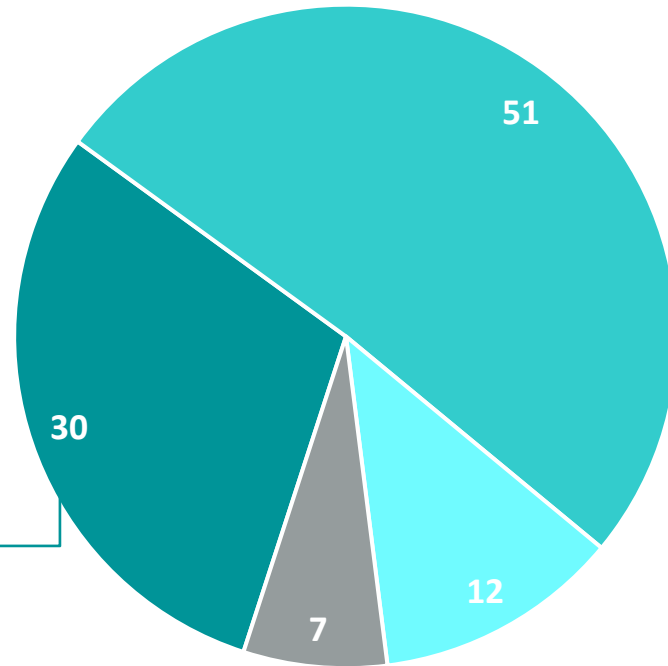


Opt-outs are highly sought after but become significantly more so for those 35+

Wave 1
89% very or fairly important

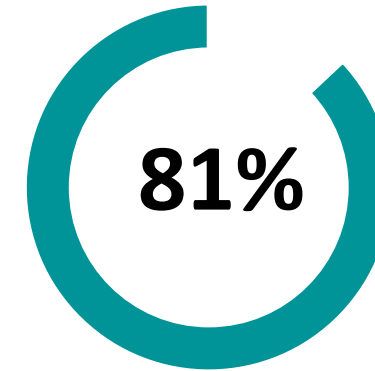
A moment of conflict? 81% feel its important they have opt-outs but over two-thirds (70%) feel they don't have a choice around what personal data they share

Q10. To what extent do you feel you have a choice around what personal data you share with companies?



■ Full choice ■ Partial choice ■ No choice at all ■ Don't know

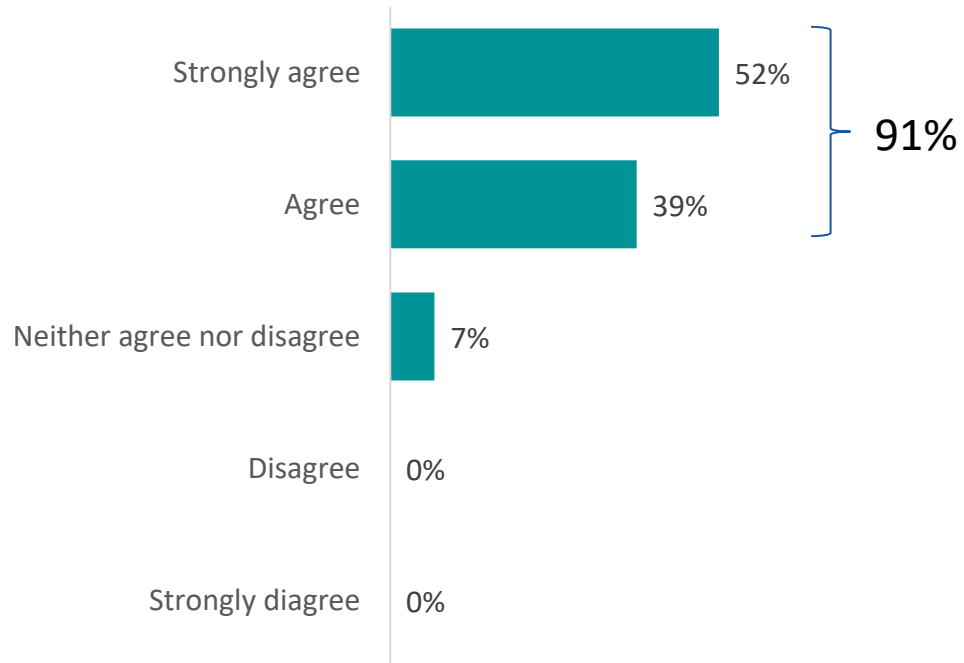
Q11. How important do you feel it is that consumers are given options to opt in or out of providing access to their data?



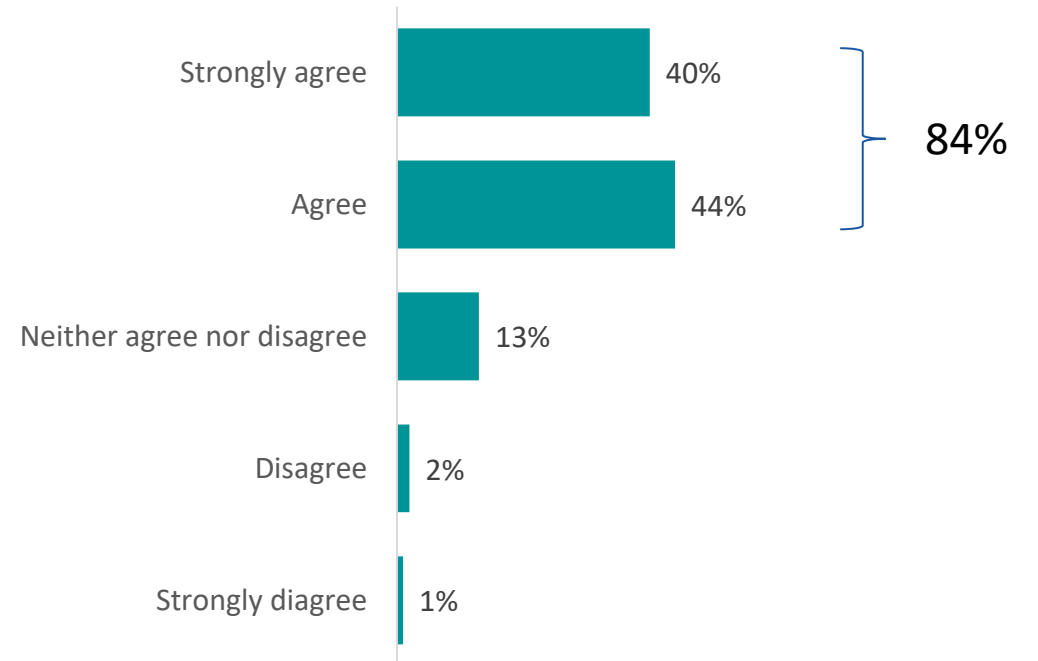
81% feel its very or fairly important they are given options to opt in or out of providing access to their data

Over 9 in 10 care strongly about their data privacy (91%), and 84% are willing to take action to protect it

Q12r1. To what extent do you agree or otherwise with the following statements? I care about my data privacy

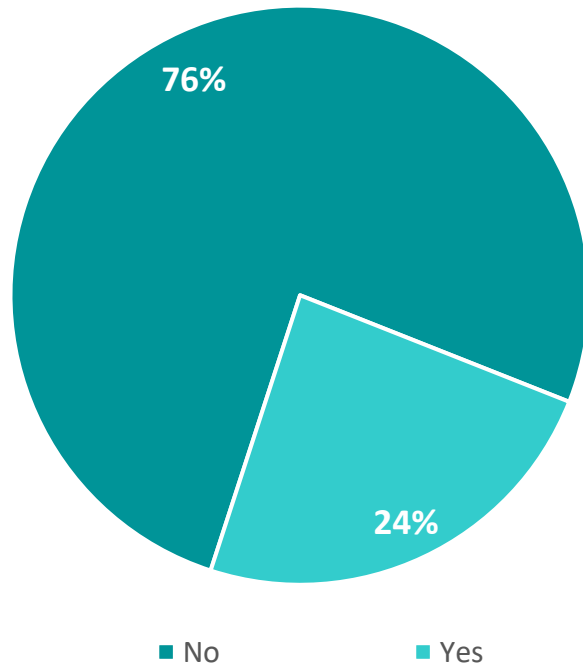


Q12r2. To what extent do you agree or otherwise with the following statements? I am willing to take action to protect my data privacy

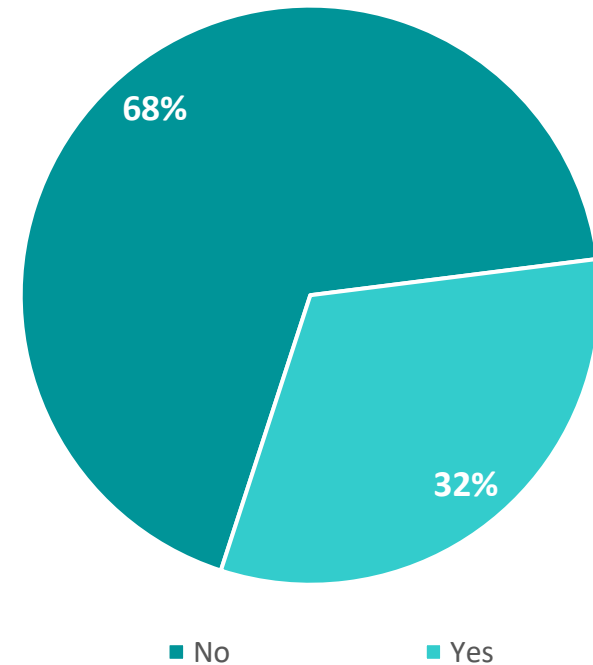


However only 1 in 4 have switched companies because of data privacy concerns and just 1 in 3 have requested removal of their personal data from a company's system – are consumers missing the controls they need to take the action on their data privacy they want to

Q13r1. Please answer yes or no for each of the statements below: I have switched companies or providers because of data privacy concerns



Q13r2. I have requested for my personal data to be removed from a company's system

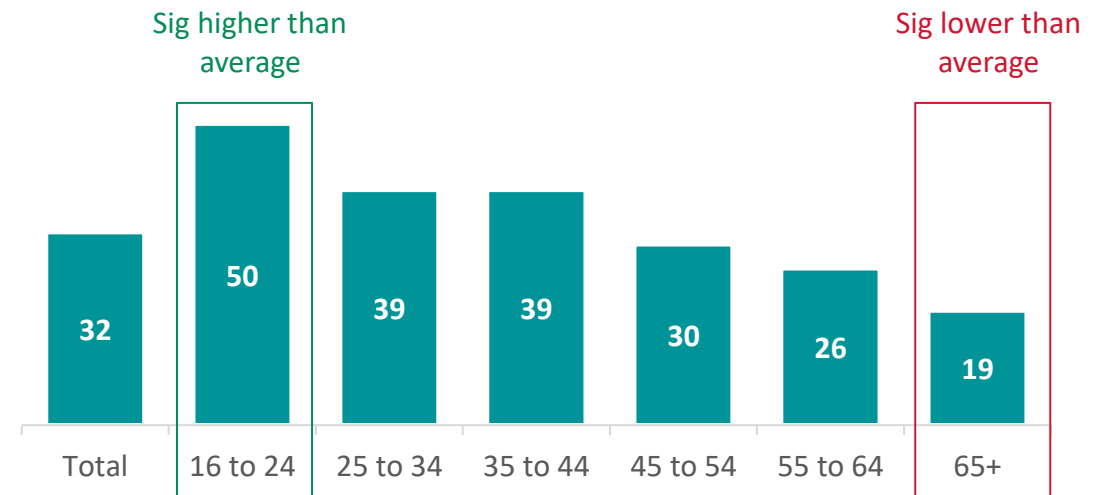
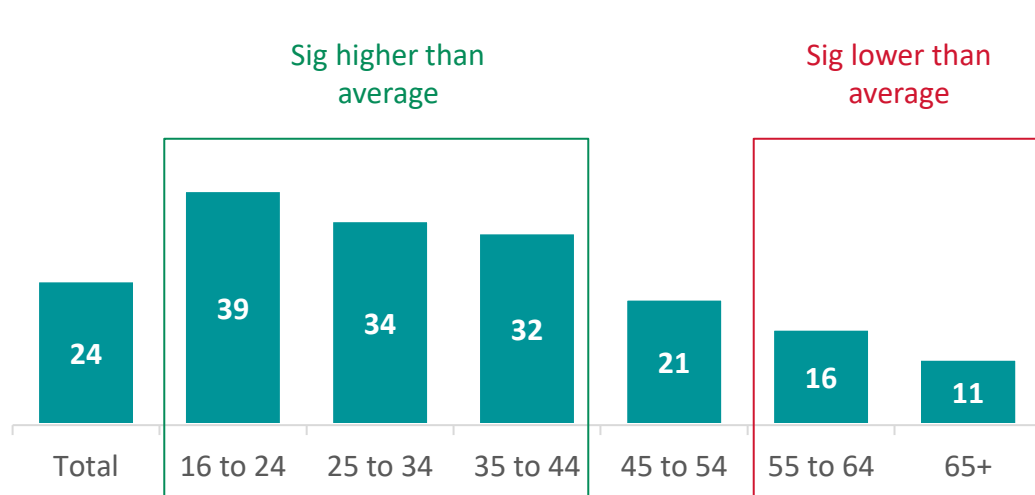


Significantly differences among different age groups can be found on next page

Significantly higher proportion of consumers in younger age groups have switched providers due to data privacy concerns and asked for their data to be removed from a company data base

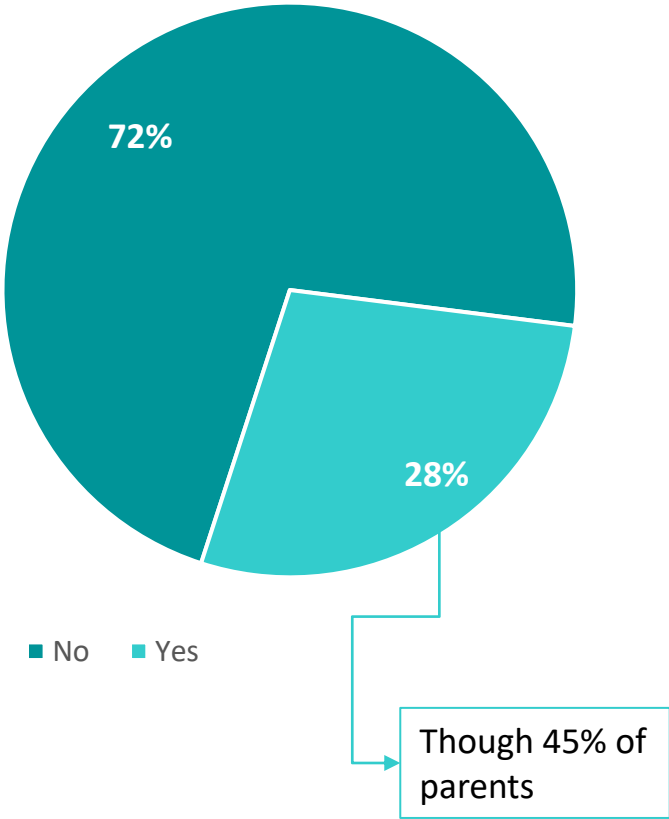
Q13r1. Please answer yes or no for each of the statements below: I have switched companies or providers because of data privacy concerns (showing % of YES)

Q13r2. I have requested for my personal data to be removed from a company's system (showing % of YES)



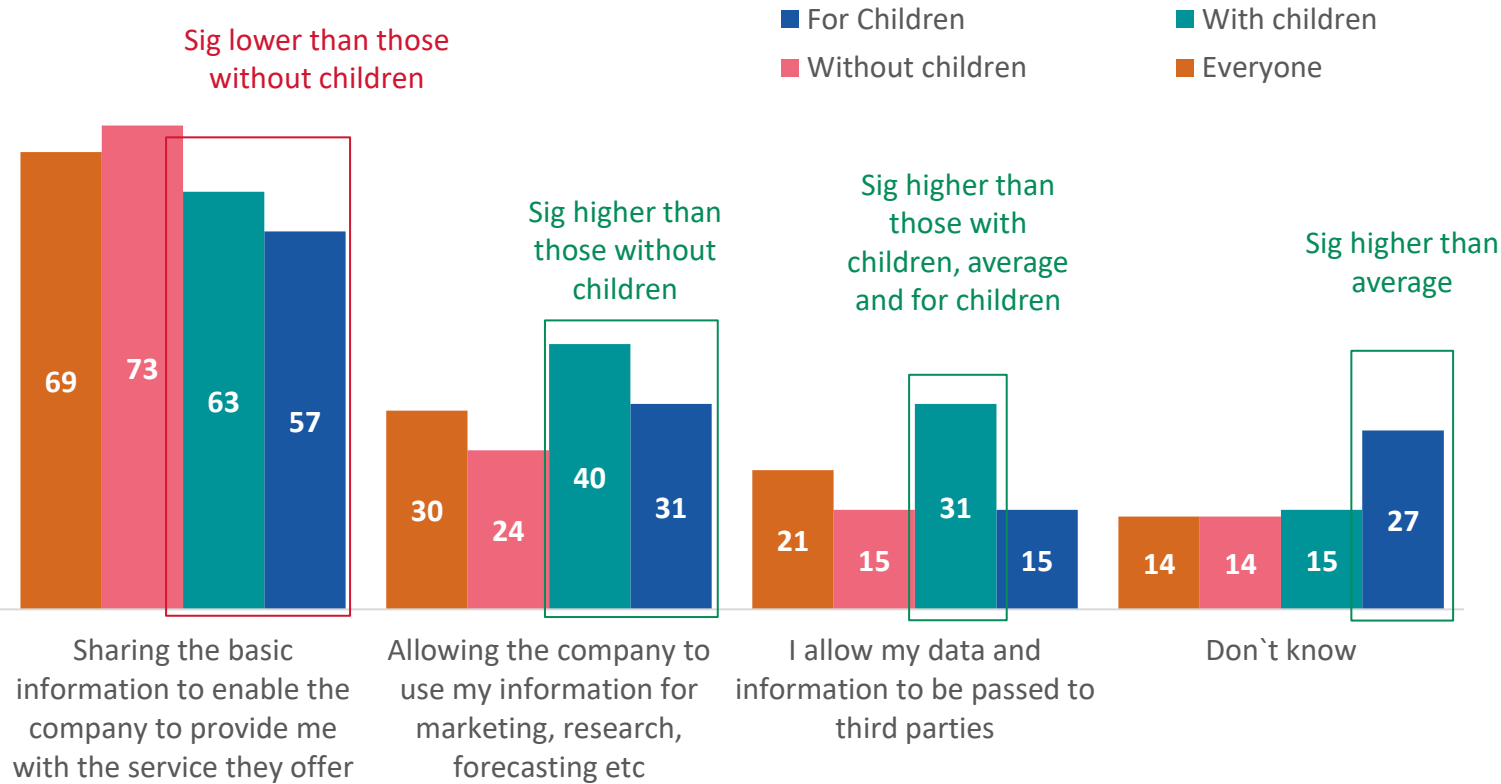
The Children's code is not widely known about, though parents say they are slightly more guarded about their children's information than their own

Q15. The Children's code, which came into practice on 02/09/21, is a data protection code of practice for online services. Before today had you heard of the Children's code?



Q14. Typically, when you share your data in order to use a service or product, for example when you shop online, use an energy company or book a holiday online, which level of data sharing do you sign up to?

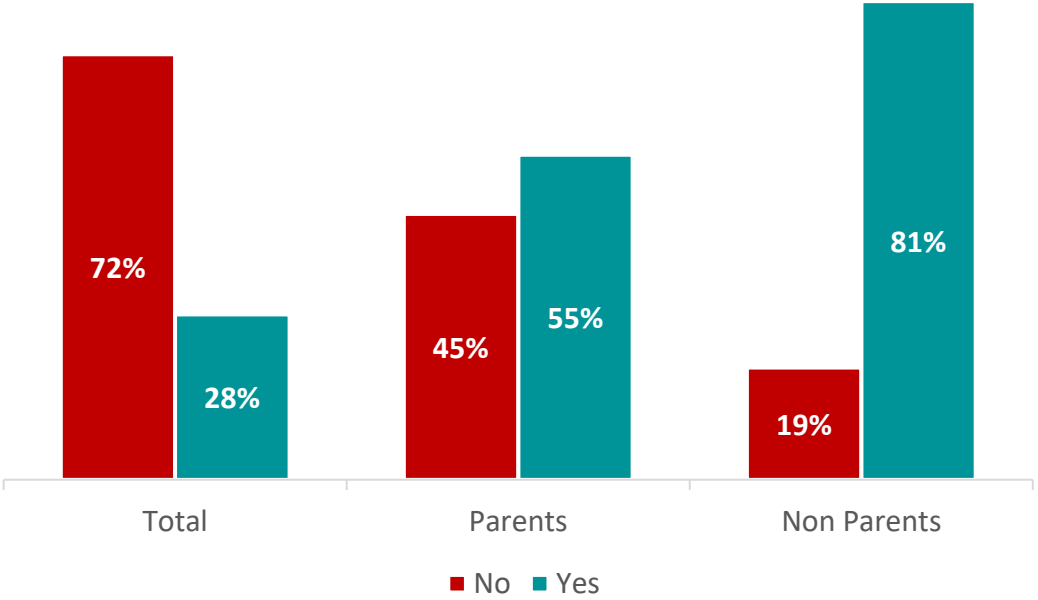
Q16. Please now think specifically about your children, when you share THEIR data in order to use a service or product, which level of data sharing would you sign them up to? **(for children)**



Base; All participants: 1001. Participants with children: 356. Q16 is only shown to those with children.

Those with children were significantly more likely to be aware of the Children’s code when compared to those without

Q15. The Children’s code, which came into practice on 02/09/21, is a data protection code of practice for online services. Before today had you heard of the Children’s code?



Q16. Please now think specifically about your children, when you share THEIR data in order to use a service or product, which level of data sharing would you sign them up to?



Base; All participants: 1001. Participants with children: 356, Participants without children: 645. Q16 is only shown to those with children.

Types of data and Brand Trust



Leisure activities (53%) and date of birth (53%) are the only data types that over half of the sample are comfortable with sharing

Q21. Thinking about different types of data, from the statements below, please select the one that describes your general attitude to sharing each of the following types of information with companies

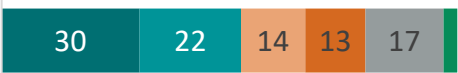
Majority comfortable



Leisure activities, e.g. hobbies, season tickets



Date of birth



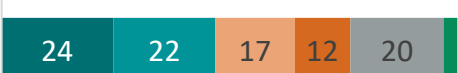
Travel behaviour, e.g. railcard, frequent flyer accounts



Shopping habits



Basic household information, e.g. home address, number of people living in your household



Specific personal health data, e.g. medication needed, vaccine status, covid status



Financial, e.g. household income, salary, mortgage information



Location, e.g., GPS tracking while out and about



Biometric information eg facial recognition



Majority uncomfortable



- I am comfortable sharing this data with companies I use to enable them to provide me with the service offered
- I am comfortable sharing this data with companies I use but only if there is benefit for me (special offers, premium ser
- I am uncomfortable sharing this data with companies but will do so on rare occasions if there is benefit for me (special
- I am uncomfortable sharing this data with companies in any circumstances and try to avoid it
- I am uncomfortable sharing this data with companies and only do so if I need to in order to access the service
- Prefer not to answer

This data indicates there is low consent for the online data sharing that is part and parcel for consumer life in the UK

The NHS continues to be far and away the most trusted organisation when it comes to data sharing. Trust in government has almost doubled from wave 1

Q23. How comfortable would you feel about sharing your data with the types of organisation shown below?



Base; All participants: 1001.

Significantly higher

The types of data that consumers are most willing to share with companies are those where there is an obvious relevance and use to them

Q23. For each type of personal data that you saw previously, please indicate which type of companies / organisation would you be happy to share it with

■ Willing to share data ■ Not willing to share data

	Mobile phone	Banks	Supermarkets	Insurance	Utilities (electricity/ gas/water)	Social media	Technology service providers	Media & Entertainment	The Government	Travel/ holiday companies	Healthcare insurance	The NHS
Basic household information	22	35	24	31	38	9	21	15	33	17	23	34
Date of birth	28	48	22	38	27	16	21	18	42	24	36	55
Location	17	14	11	11	14	8	12	8	16	11	10	22
Financial	9	55	7	16	12	4	8	7	14	5	9	10
Personal health	6	7	6	14	8	5	7	7	14	7	34	60
Shopping habits	10	11	46	7	9	8	9	9	8	7	6	7
Leisure activities	12	9	10	11	10	11	11	17	9	20	10	14
Travel behaviour	9	9	7	13	9	7	8	8	11	39	9	10
Biometric information eg facial recognition	13	18	7	9	8	6	7	7	13	5	8	16

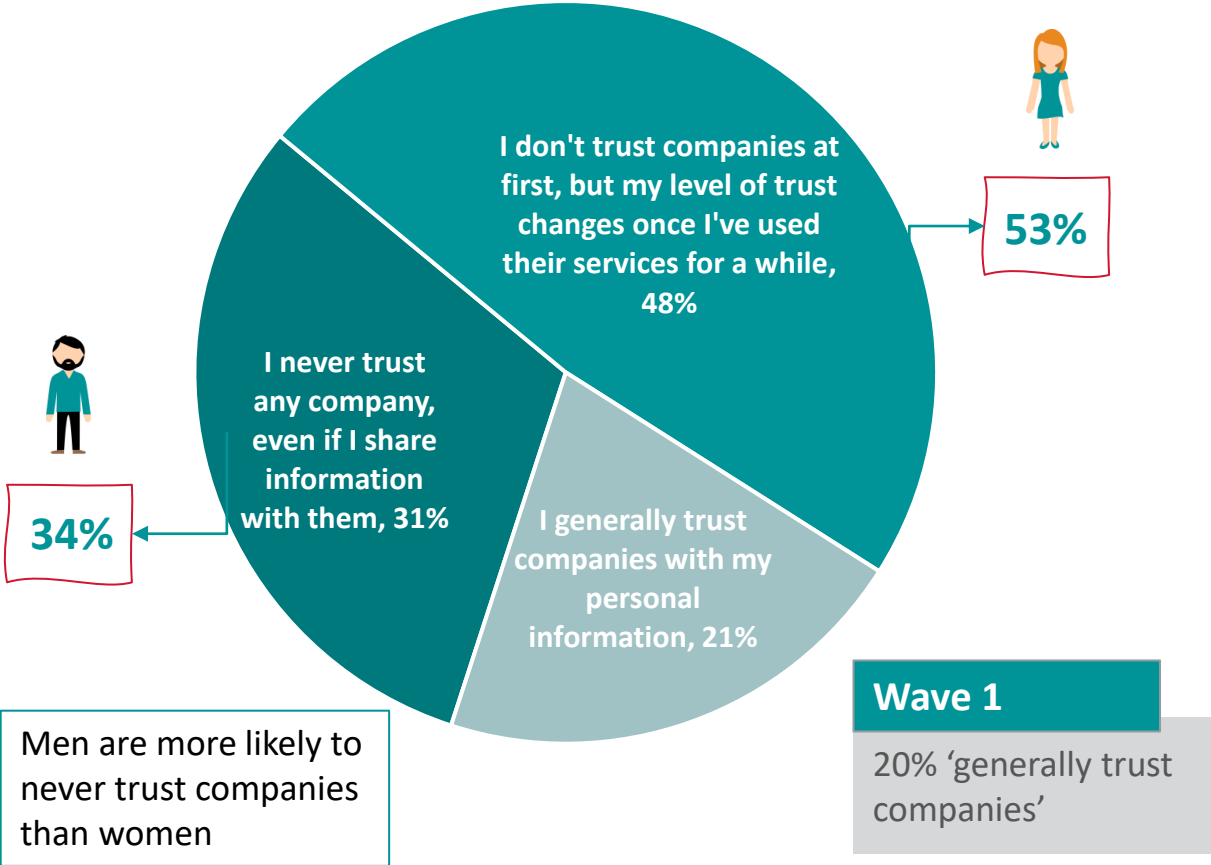
Financial for banks

Shopping habits for supermarkets

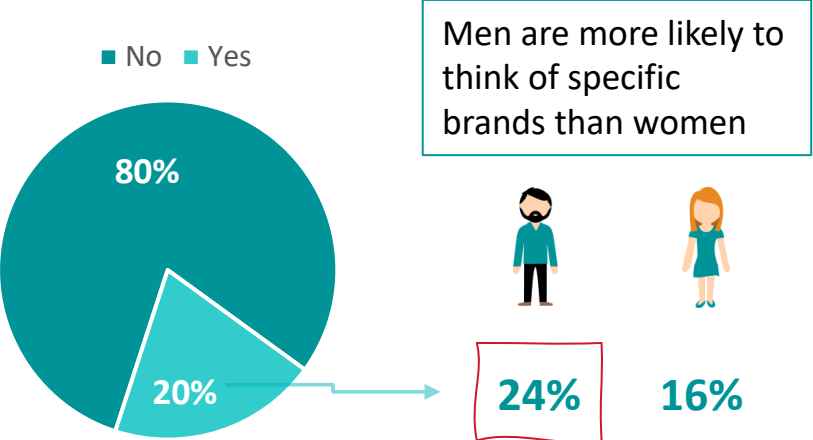
Personal health for the NHS

1 in 5 still say they generally trust companies with their personal data (Q28), but respondents were able to identify brands with whom they were both comfortable and uncomfortable sharing

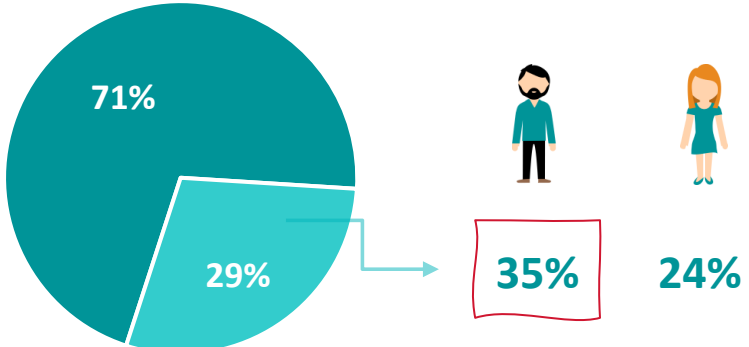
Q28. Please indicate how much you trust companies you're sharing personal information with



Q24. Can you think of any specific brands who you are more comfortable sharing your data with than others?



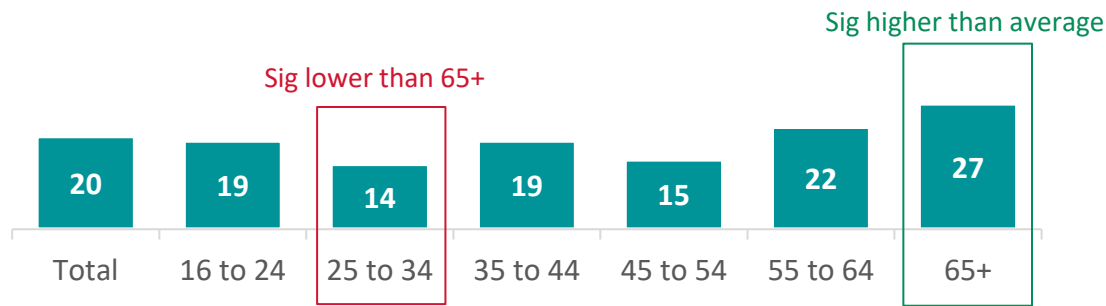
Q26. Can you think of any specific brands who you are more uncomfortable sharing your data with than others?



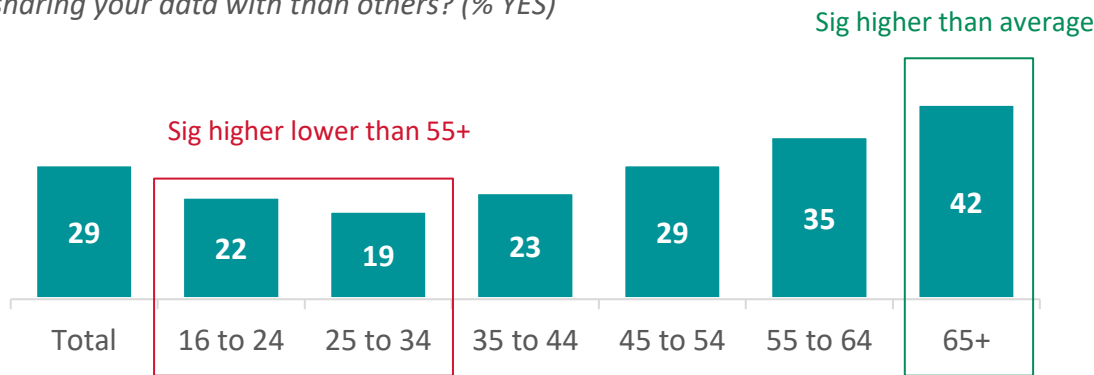
Base; All participants: 1001.

Younger consumers are more likely to have higher trust in companies that they've shared personal information with; while older consumers have lower trust, and are more specific about brands they trust

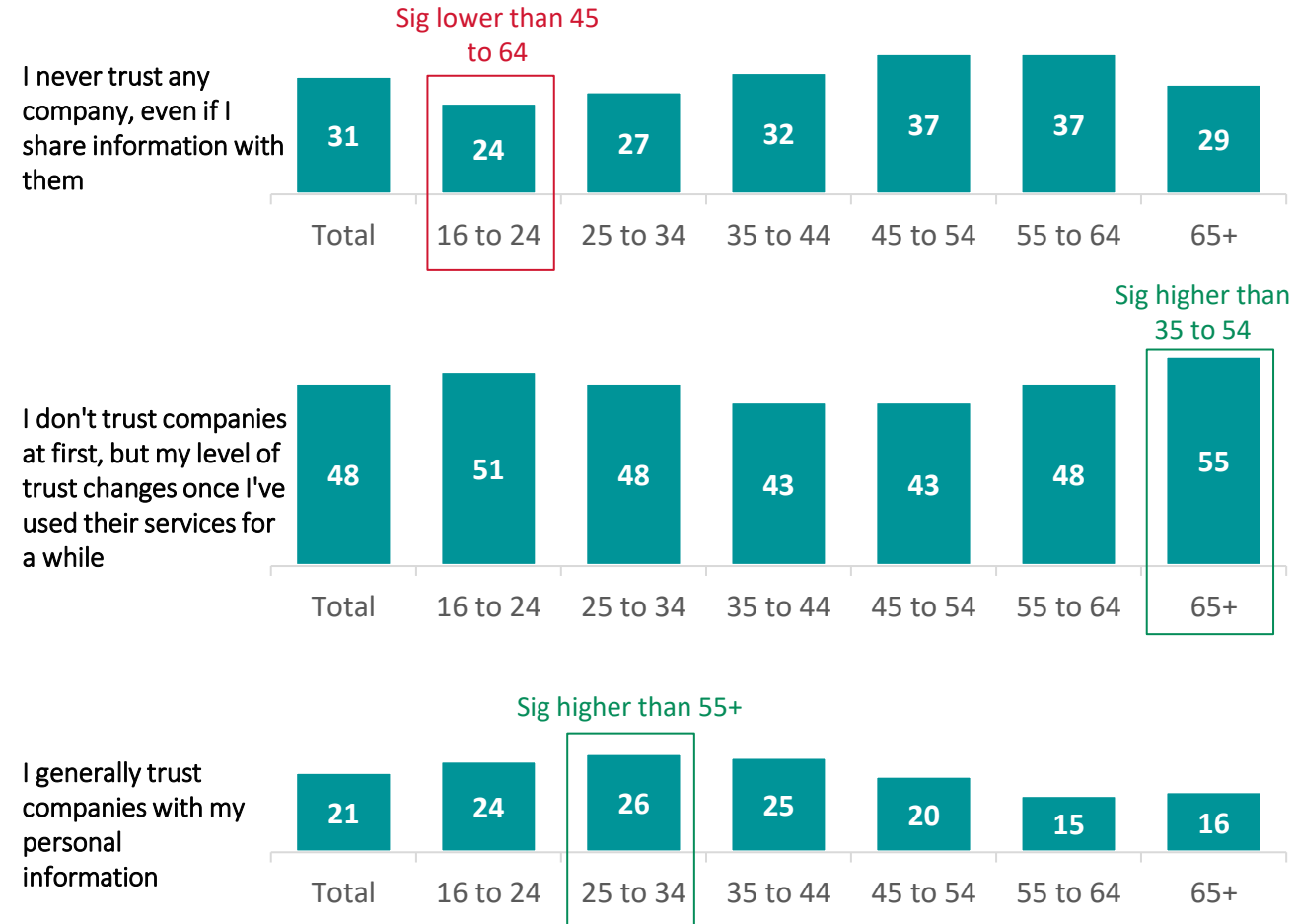
Q24. Can you think of any specific brands who you are **more comfortable** sharing your data with than others? (% YES)



Q26. Can you think of any specific brands who you are more **uncomfortable** sharing your data with than others? (% YES)



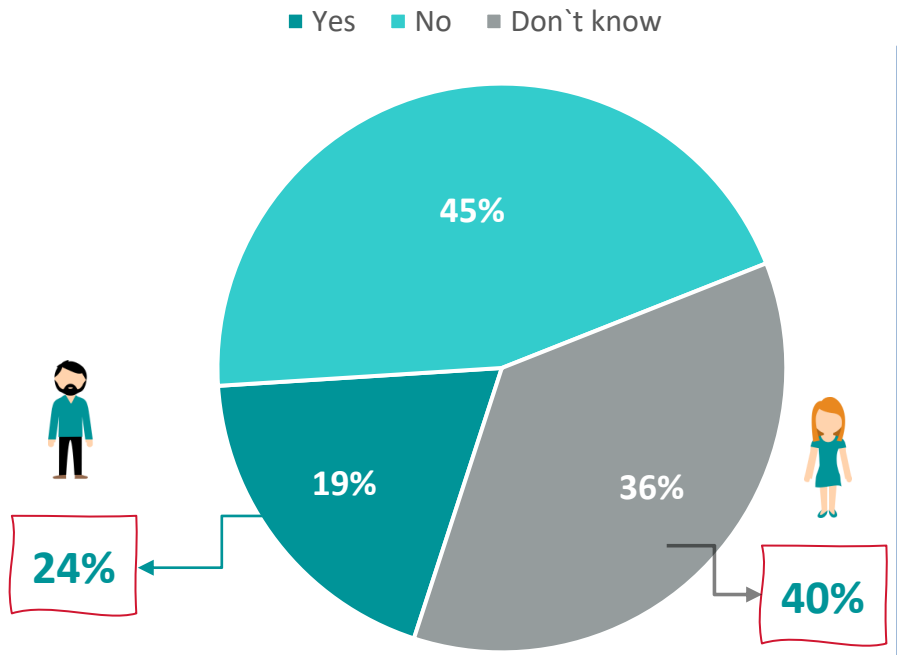
Q28. Please indicate how much you trust companies you're sharing personal information with



Base; All participants: 1001, 16 to 24:103, 25 to 34:147, 35 to 44:142, 45 to 54:175, 55 to 64:159, 65+:226

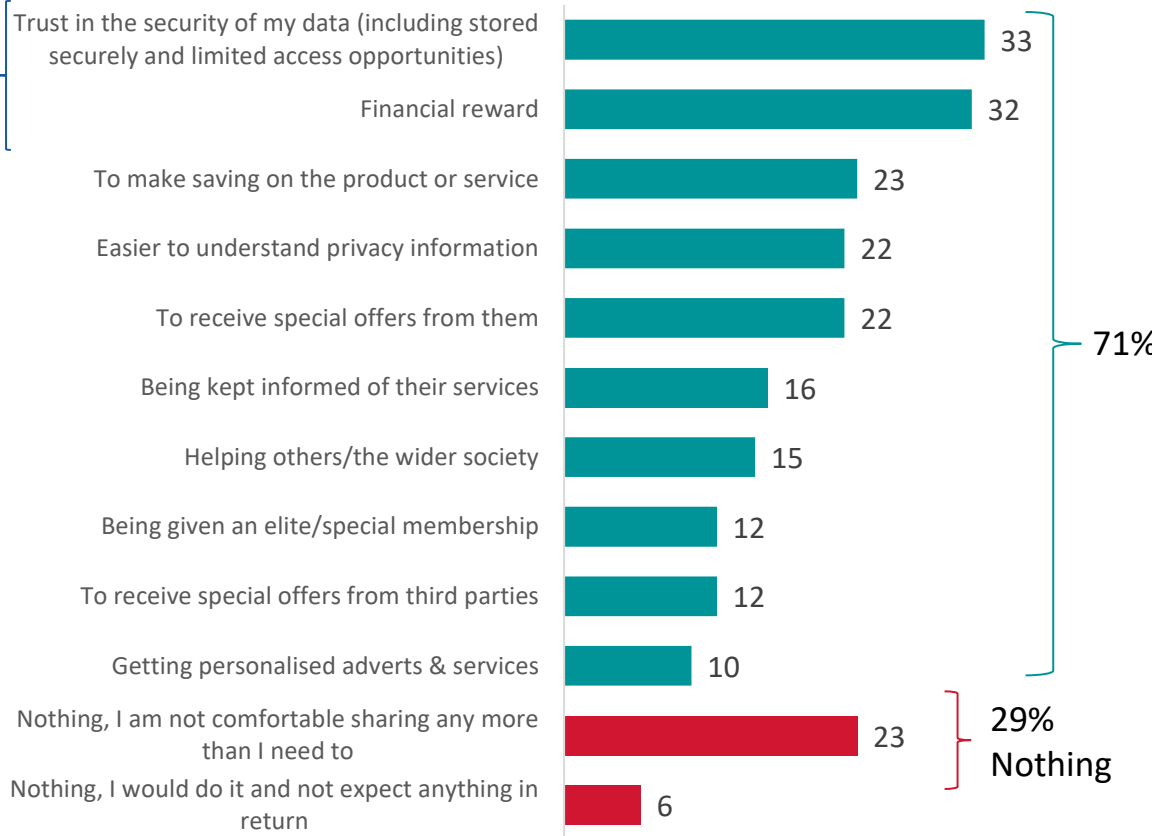
Over two thirds of consumers (71%) are open to sharing more data with factors relating to both trusting and knowing more about privacy information and receiving a financial benefit being the main incentives

Q29. Thinking generally, is there any information you would need to know to help you decide whether you would agree to share your data?



Though there is scope to improve trust with a third wanting more to be done to earn their trust (33%) and a third wanting a financial reward (32%)

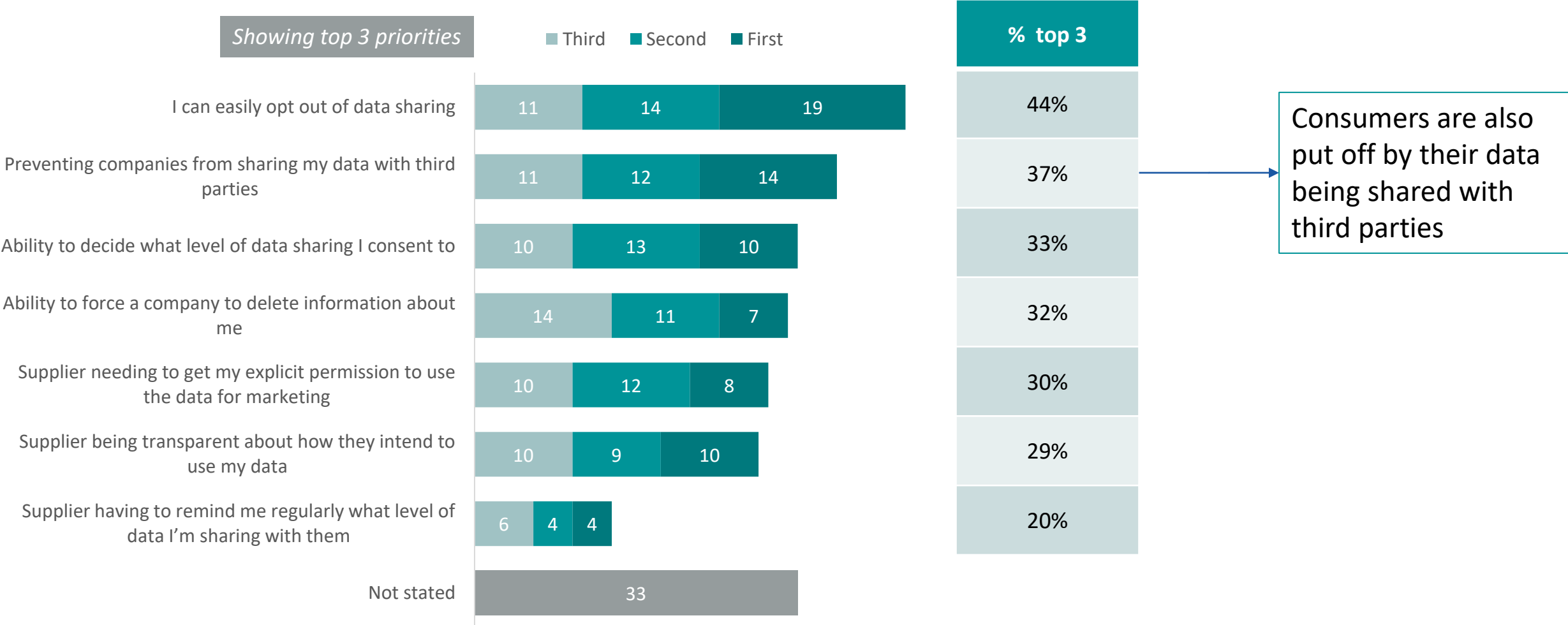
Q30. What, if anything, would encourage you to share more of your data with a company?



Base; All participants: 1001.

Easily being able to opt out of data sharing is the most likely data sharing power desired by consumers

Q32. Which of the following is most important to you in reassuring you about what happens with your data?



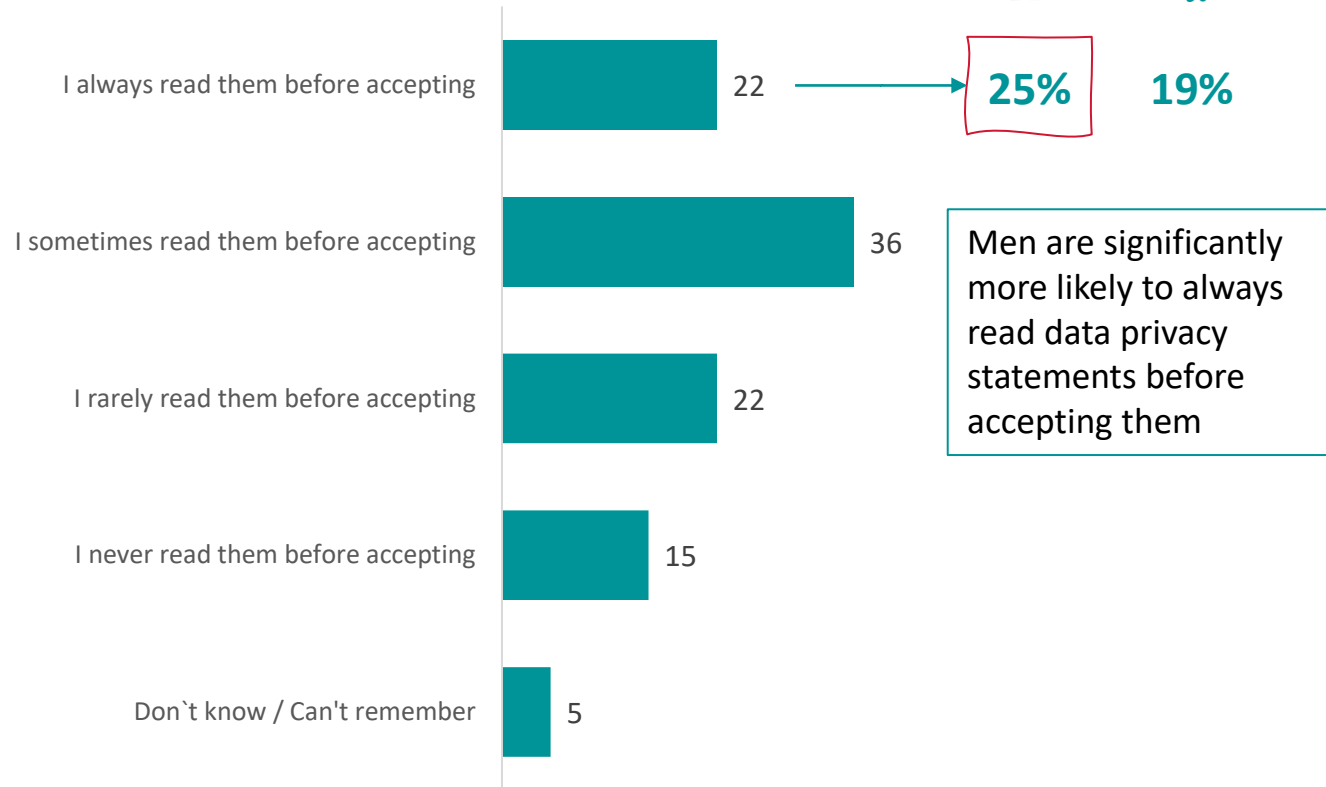
Base; All participants: 1001.

Cookies

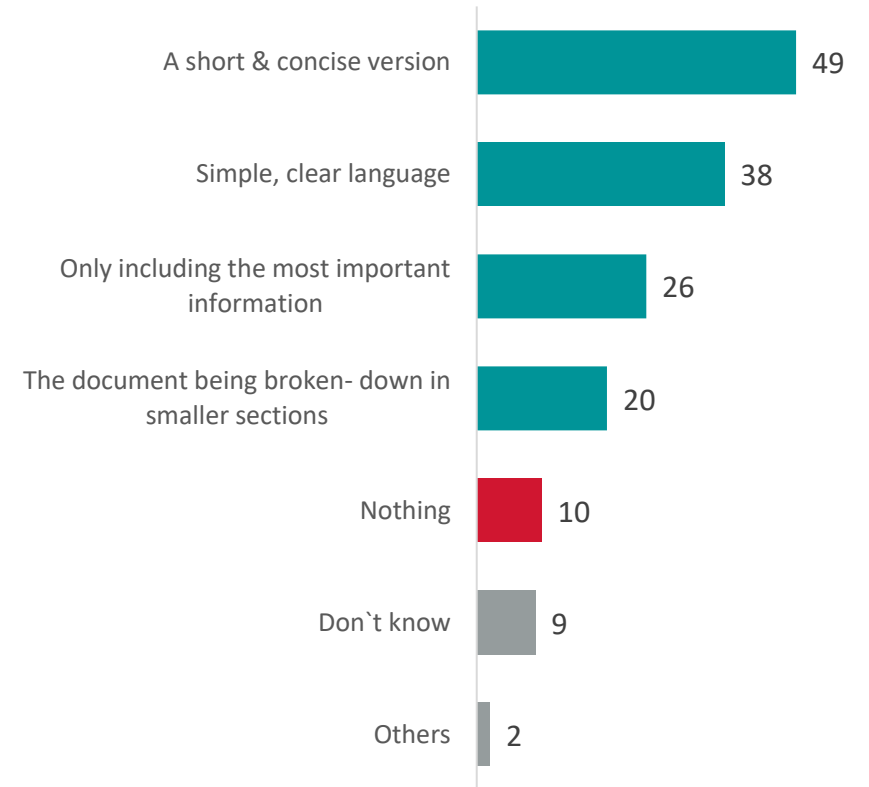


Only 22% say they always read data privacy statements before accepting them online; complexity and length of the statements are the biggest barriers to consumers

Q33. When visiting a new website, you are often asked to accept the website's cookies. Do you read the Cookies preferences/policies/settings before accepting?

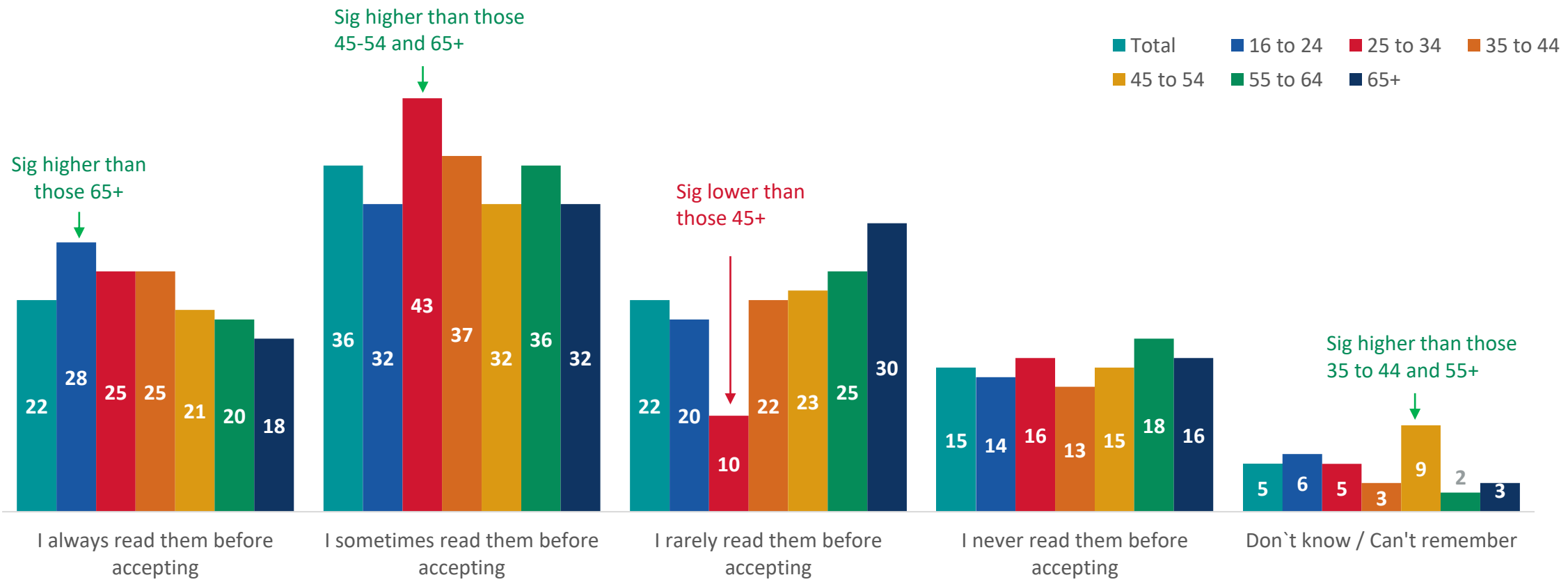


Q34. What would encourage you to read these cookies preferences/policies/settings?



Those 16-24 are significantly more likely to always read Cookies preferences/ policies before accepting when compared to older age groups

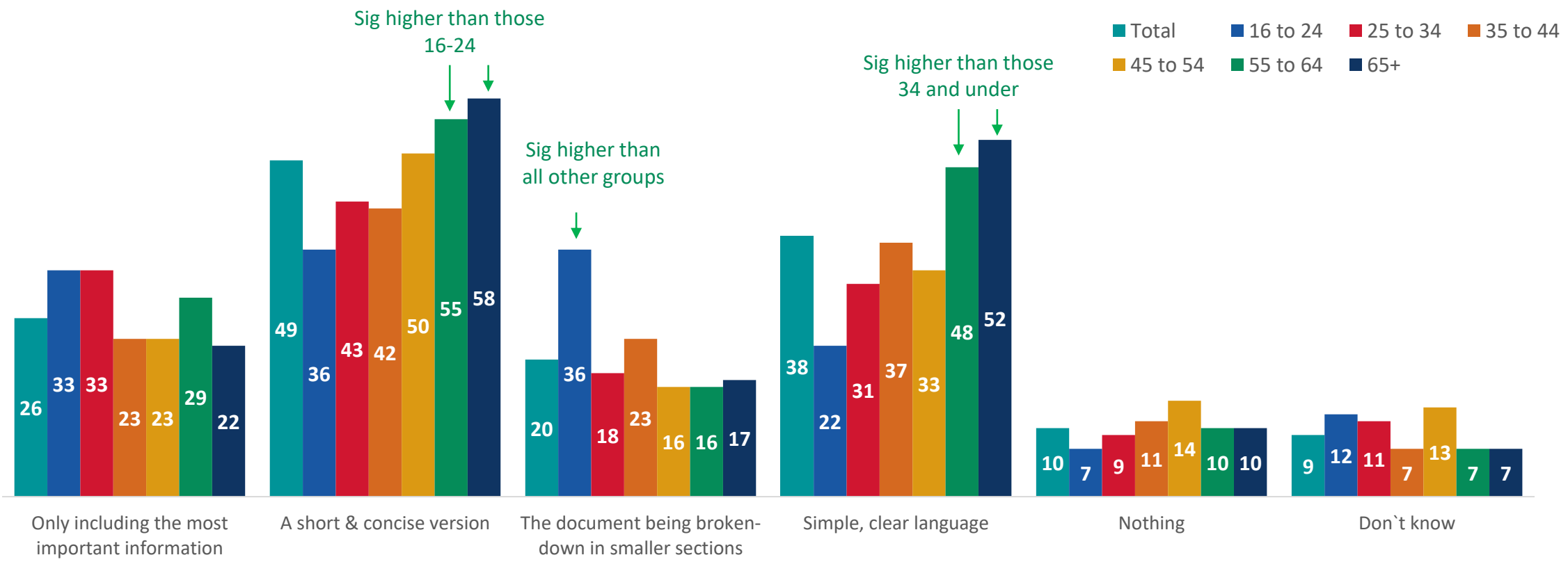
Q33. When visiting a new website, you are often asked to accept the website's cookies. Do you read the Cookies preferences/ policies / settings before accepting?



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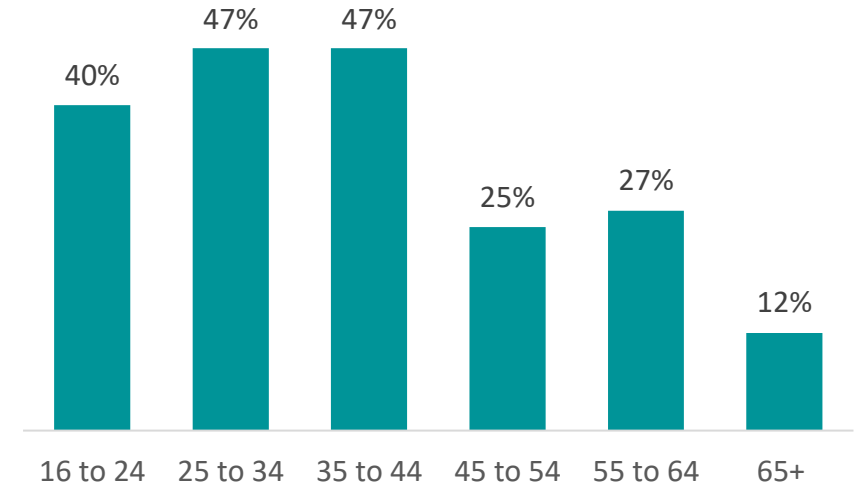
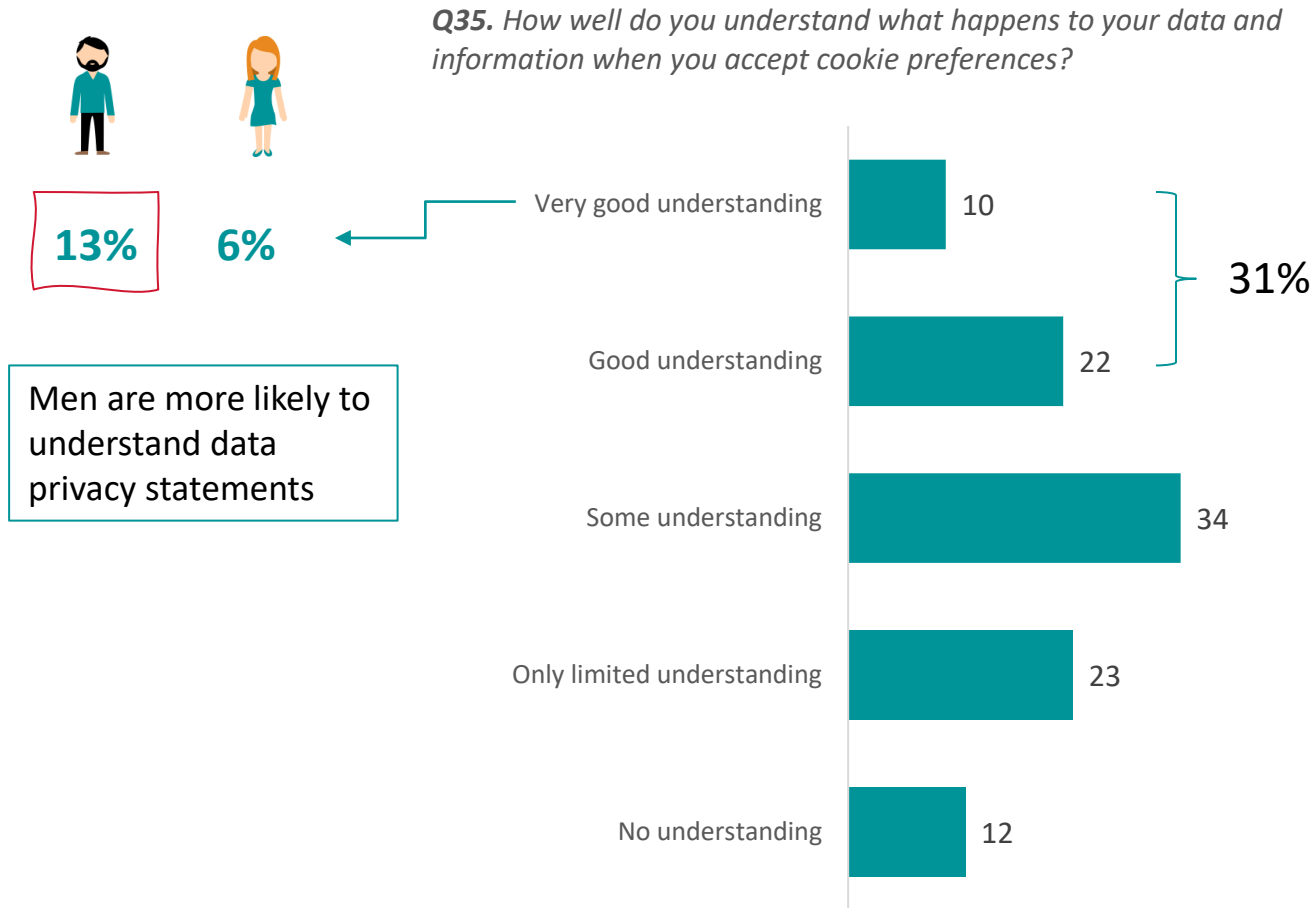
Older consumers think a short & concise version of the Cookies preferences/ policies with simple, clear language would encourage reading

Q34. What would encourage you to read these cookies preferences/ policies / settings?



Base; All participants: 1001, 16 to 24:103, 25 to 34:147, 35 to 44:142, 45 to 54:175, 55 to 64:159, 65+:226

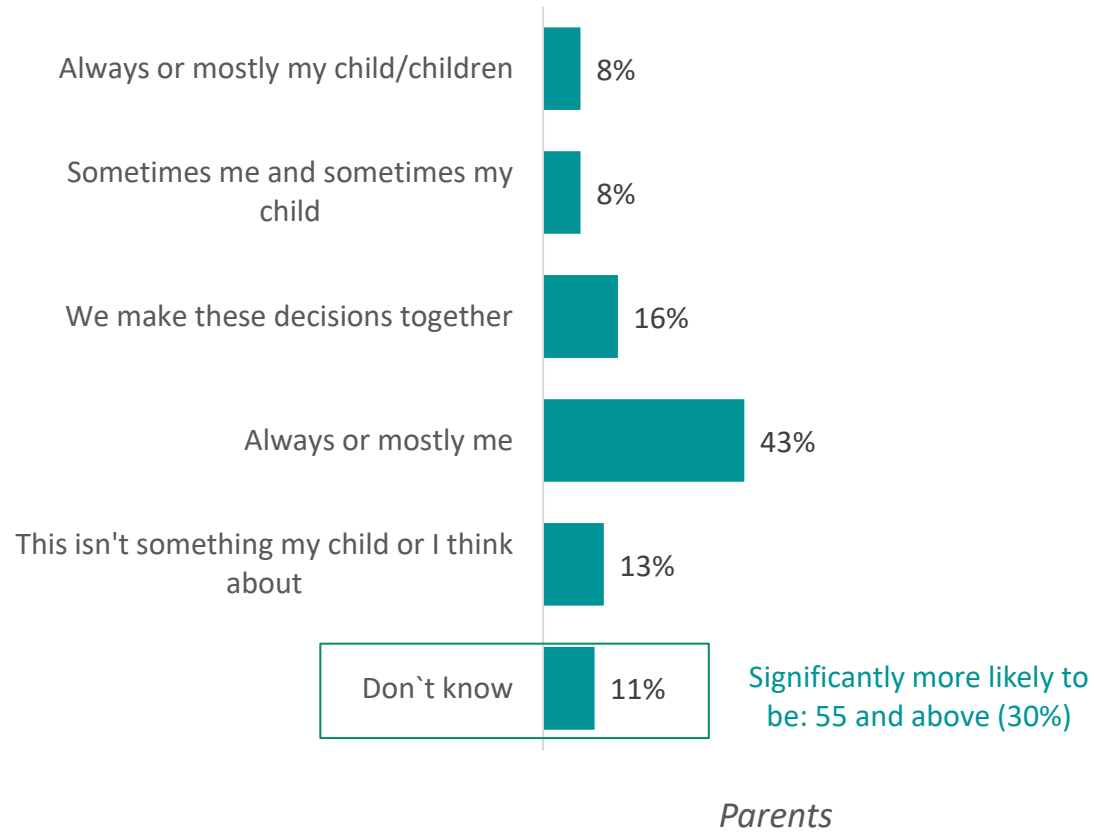
It's not surprising then that only 10% have a very good understanding of what happens to their data once they accept cookie preferences



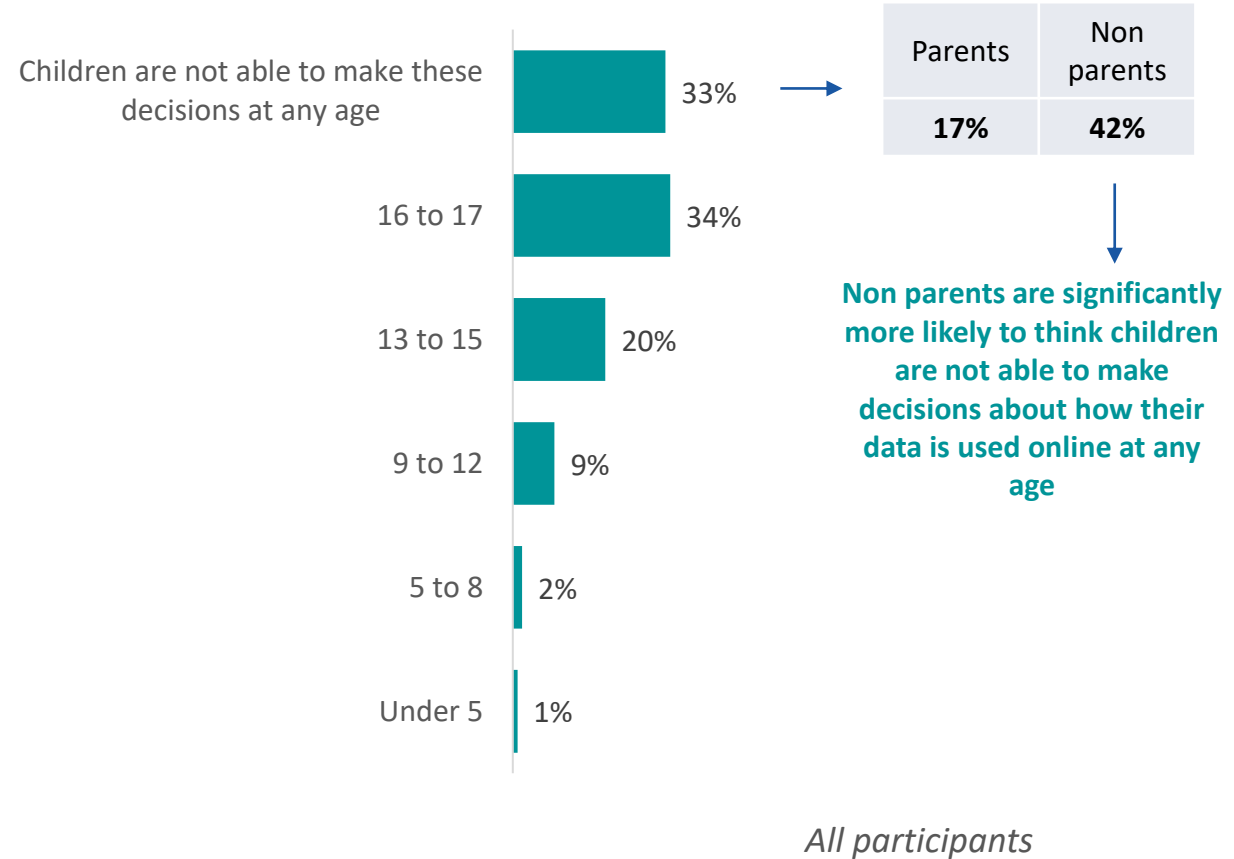
A significant generational drop off in understanding for those 45+

43% of parents are the sole decision makers of how their child's data is shared online with a third of adults saying children are not able to make these decisions at any age

Q17. Who makes the decisions about how your child's data is shared online?

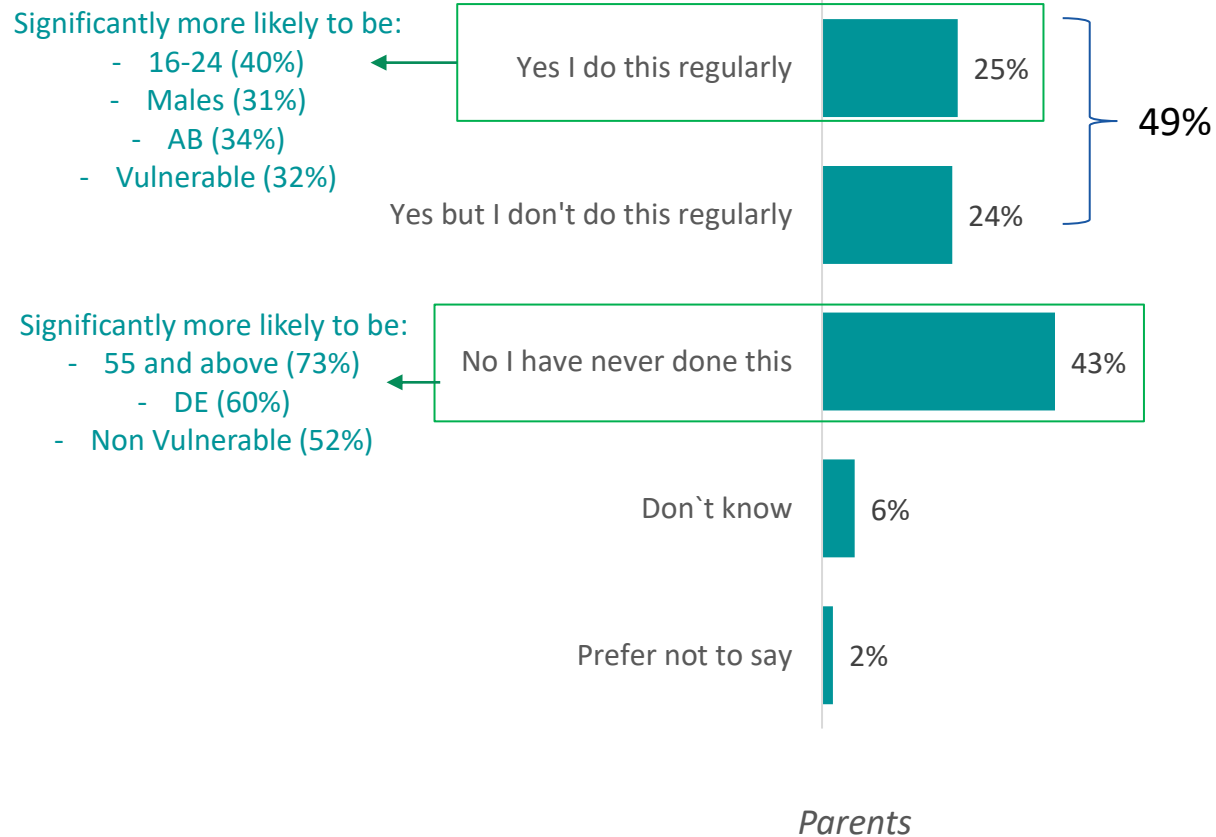


Q20. Generally speaking, what age do you think children are able to make decisions about how their data is used online?

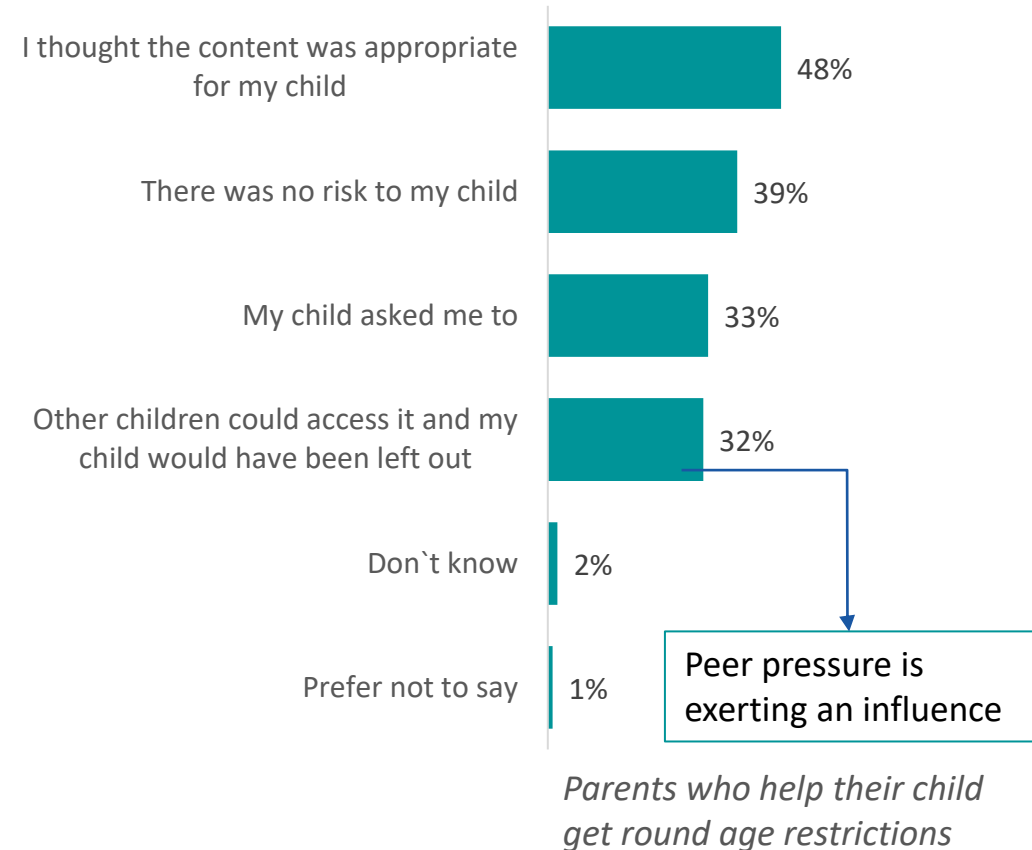


Nearly half of parents have helped their child get round age requirements online

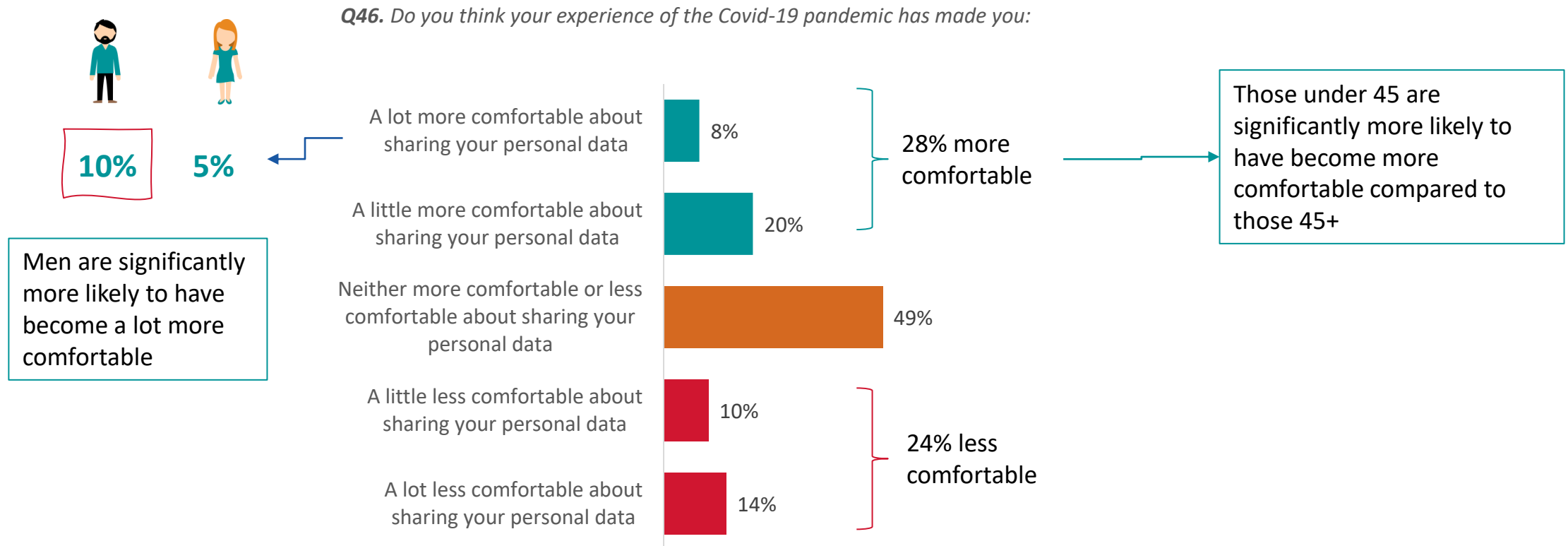
Q18. Have you ever helped your child get round age requirements in order to access a service online. For example, this could be a social media website, a game or a movie that has a higher age rating than your child's age?



Q19. What leads you to help a child get round age restrictions

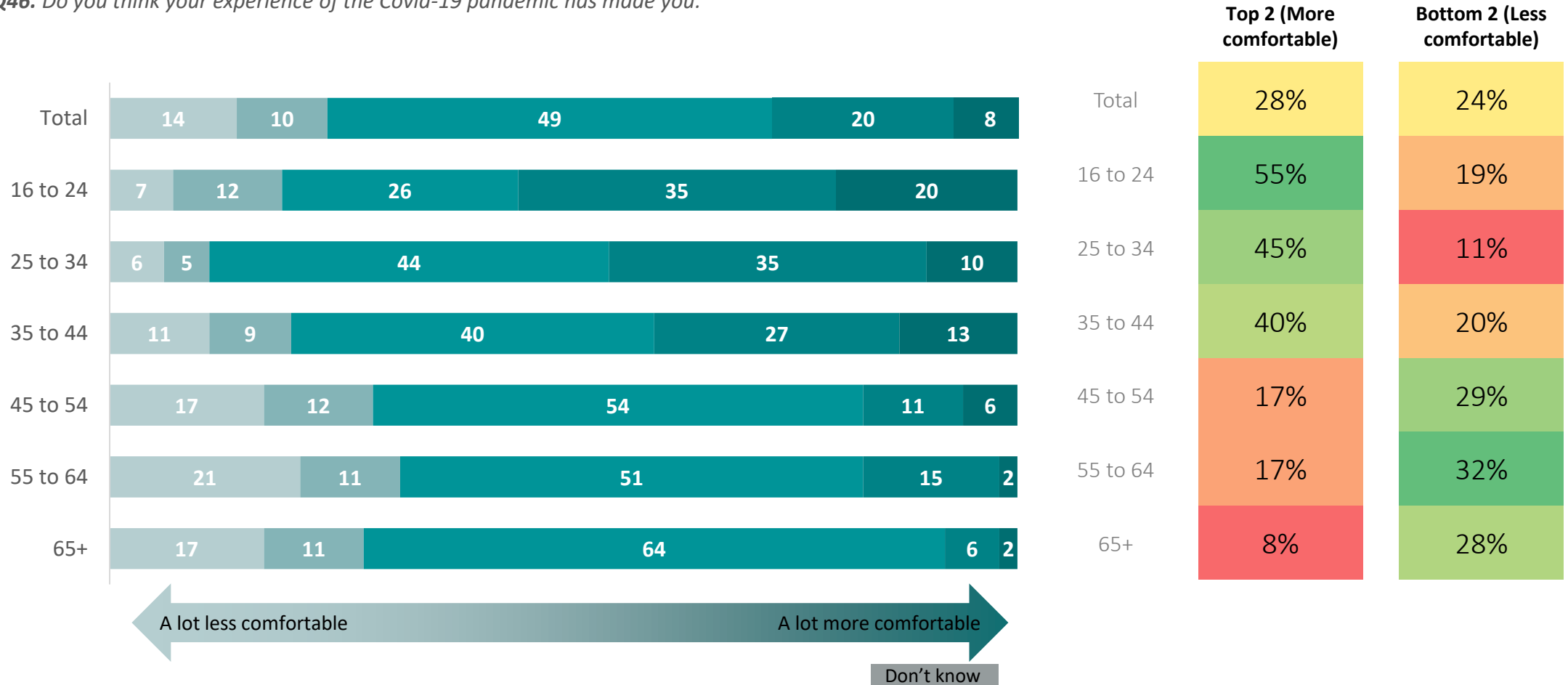


Whilst COVID-19 hasn't changed the comfort with data sharing for nearly half of consumers; the 28% overall rise in those who have become more comfortable has been largely driven by those under 45



The pandemic seems to have the opposite effect when it comes to the comfort with data sharing among different age groups: Younger people became more comfortable while older consumers became less relaxed about it

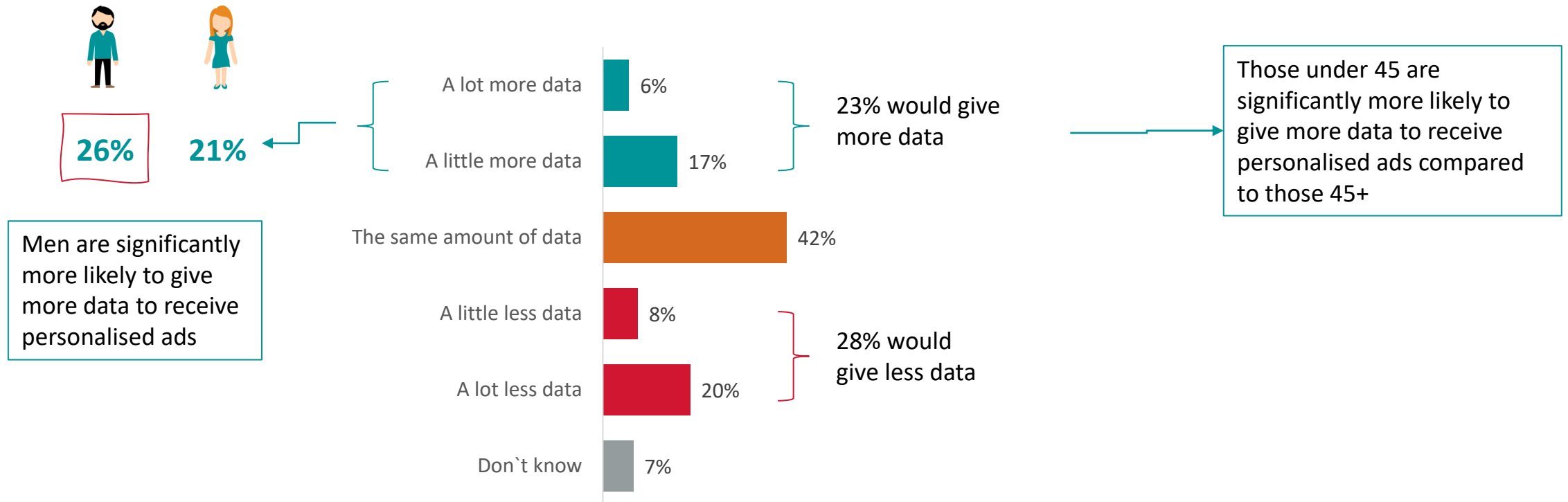
Q46. Do you think your experience of the Covid-19 pandemic has made you:



Base; All participants: 1001, 16 to 24:103, 25 to 34:147, 35 to 44:142, 45 to 54:175, 55 to 64:159, 65+:226

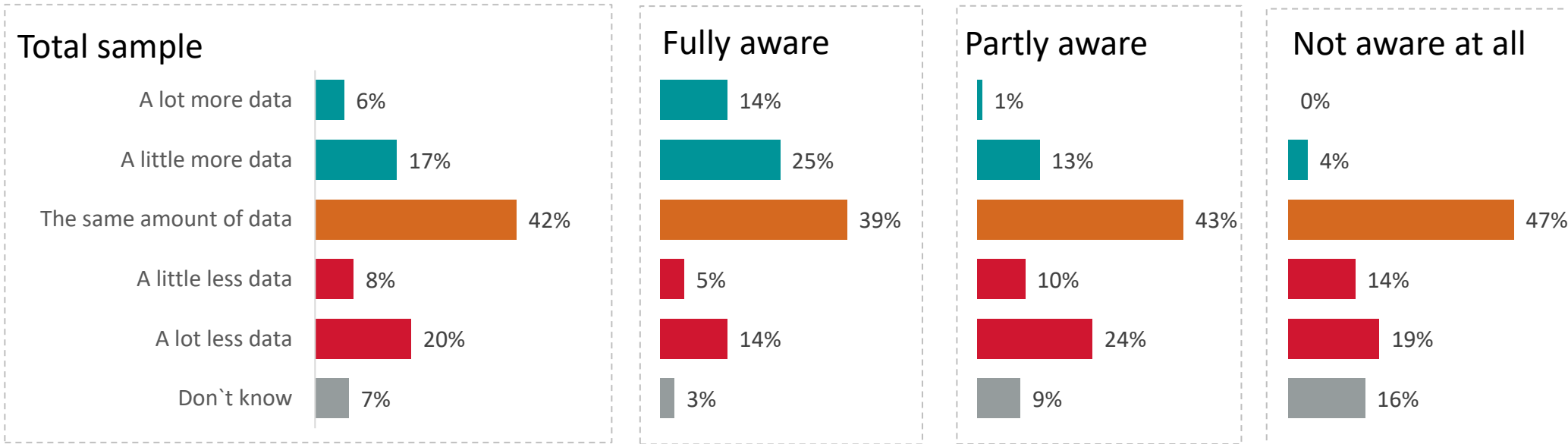
Again those under 45 are driving the proportion of consumers willing to give more data to receive personalised ads – though only 23% overall would be willing to provide more data than they do at present

Q47. In order to receive bespoke advertising, organisations need more data about you in order to personalise the service. Would you be willing to provide more data in order to receive a personalised, bespoke service?



Those with higher levels of data privacy awareness are more willing to share additional information in order to receive personalised advertising

Q47. In order to receive bespoke advertising, organisations need more data about you in order to personalise the service. Would you be willing to provide more data in order to receive a personalised, bespoke service?

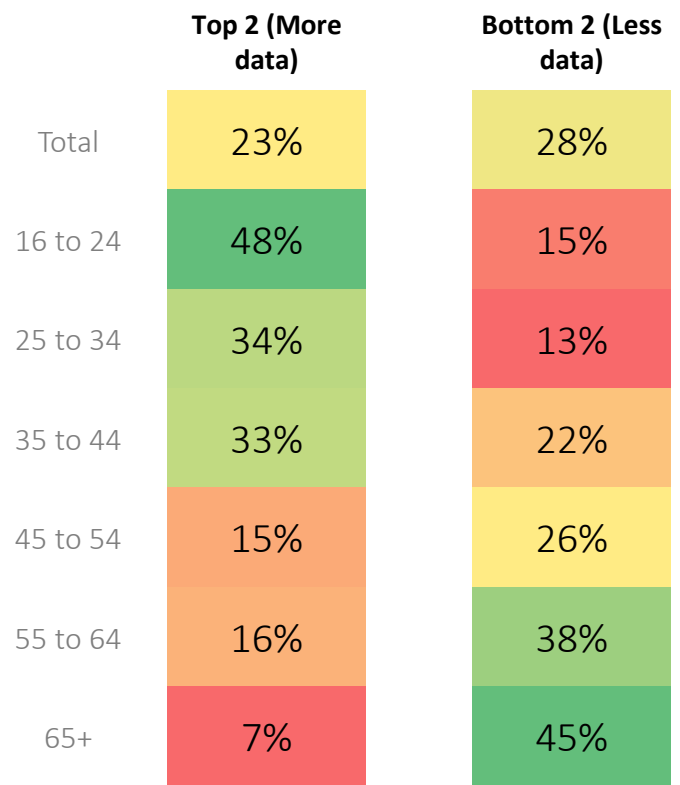
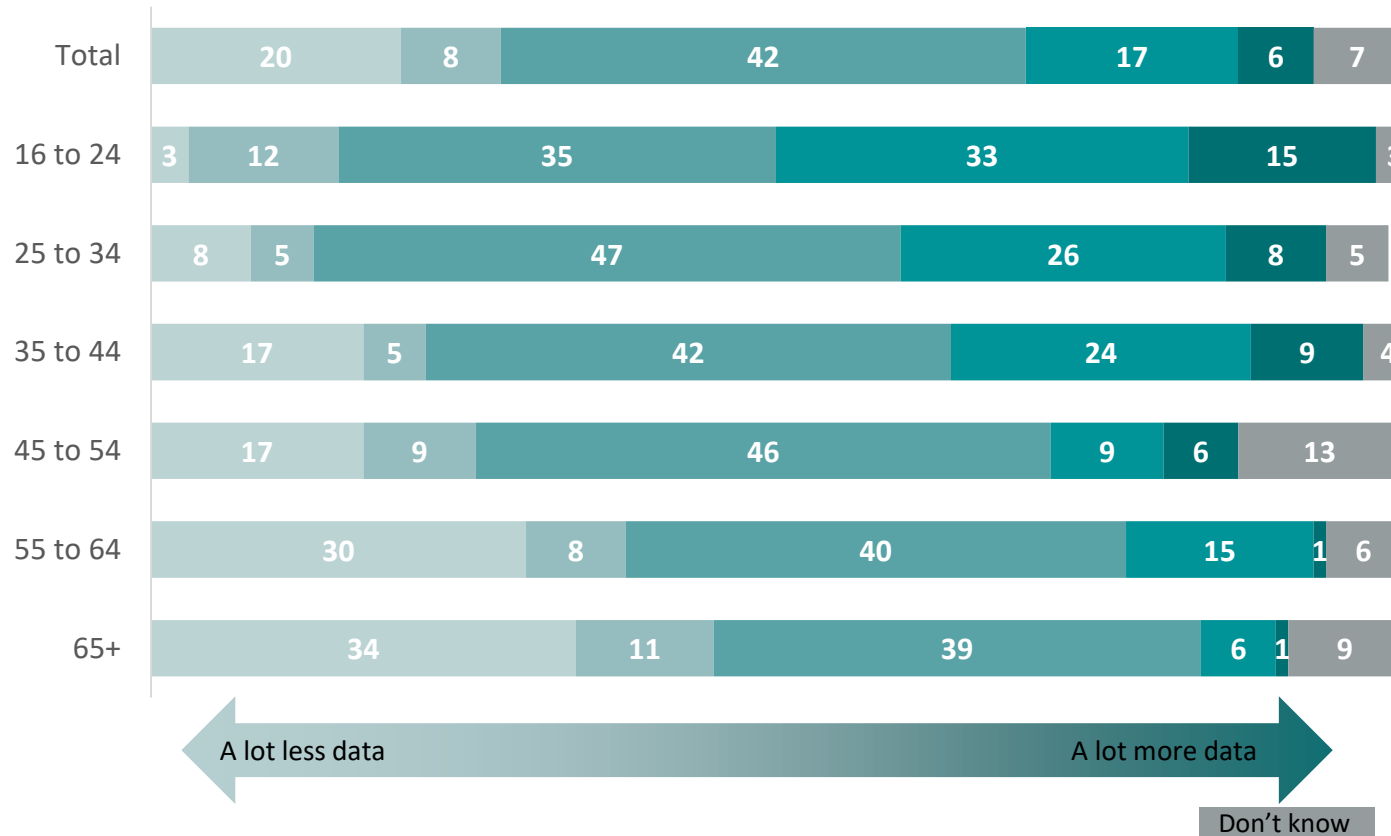


Those with higher data privacy awareness (fully & partly aware) are significantly more likely to give more data to receive personalised ads compared to those not aware at all

	Total	Fully aware	Partly aware	Not aware at all
Top 2 Box (More data)	23%	39%	14%	4%
The same amount of data	42%	39%	43%	47%
Bottom 2 Box (Less data)	28%	19%	34%	34%
Don't know	7%	3%	9%	16%

Less than 1 in 10 of those 65+ would be willing to share more data to get a personalised service, compared to nearly half in those under 24

Q47. In order to receive bespoke advertising, organisations need more data about you in order to personalise the service. Would you be willing to provide more data in order to receive a personalised, bespoke service?

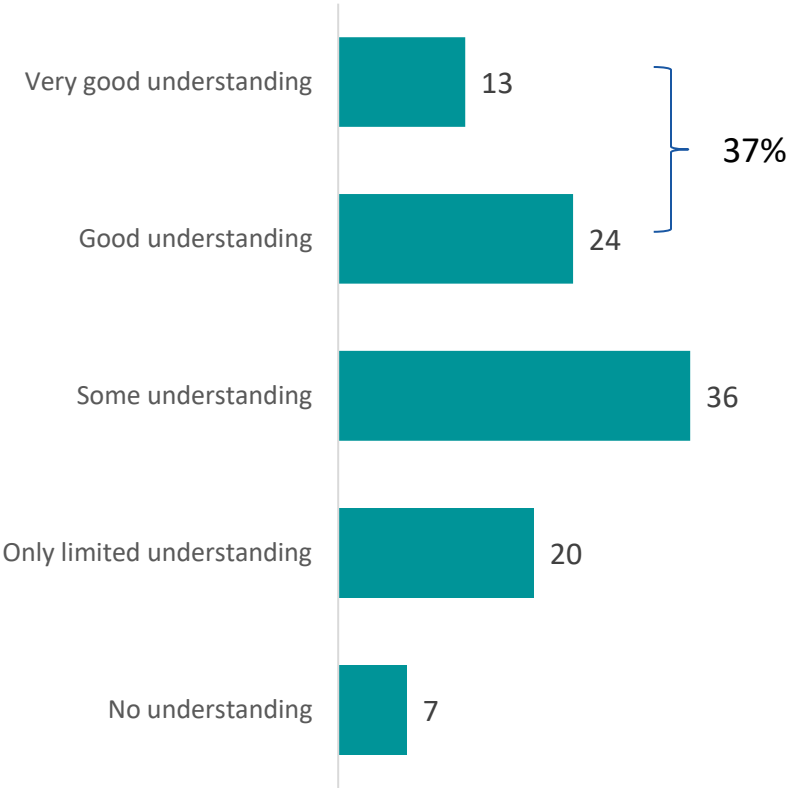


Base; All participants: 1001, 16 to 24:103, 25 to 34:147, 35 to 44:142, 45 to 54:175, 55 to 64:159, 65+:226

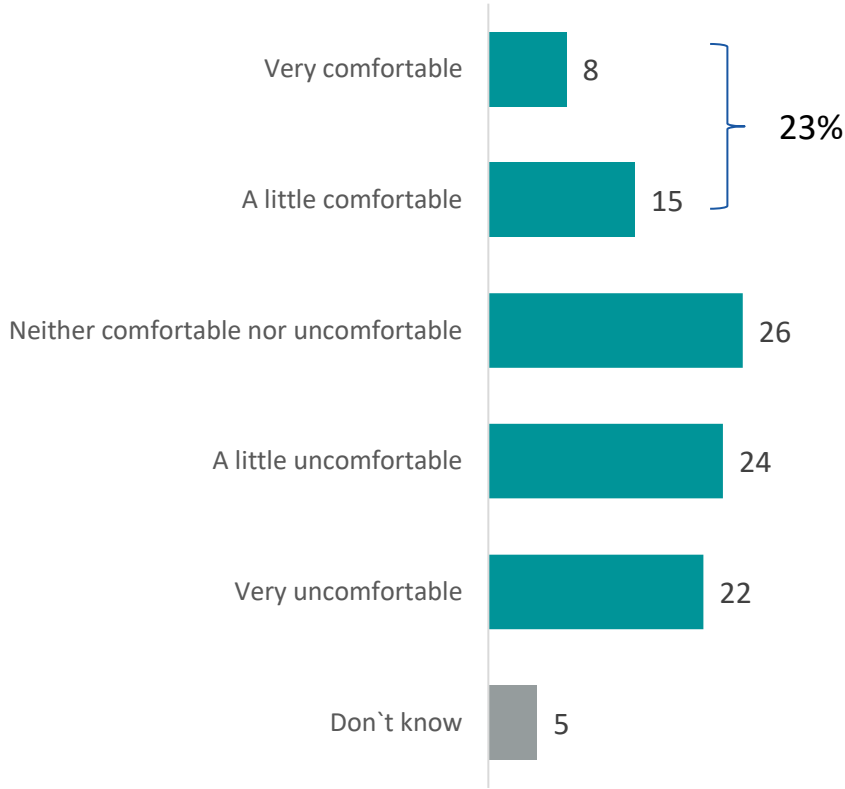
Just under 2 in 5 (37%) have at least a good understanding of what happens when they accept cookie preferences online and less than a quarter (23%) are comfortable with it

When you accept cookie preferences, your data, such as your interests, demographics and recently visited websites, is often sent to large numbers of third party organisations in order to provide you with personalised, targeted adverts. This means your data can be shared with hundreds of organisations.

Q48. Based on this information, how well do you think you now understand what happens:

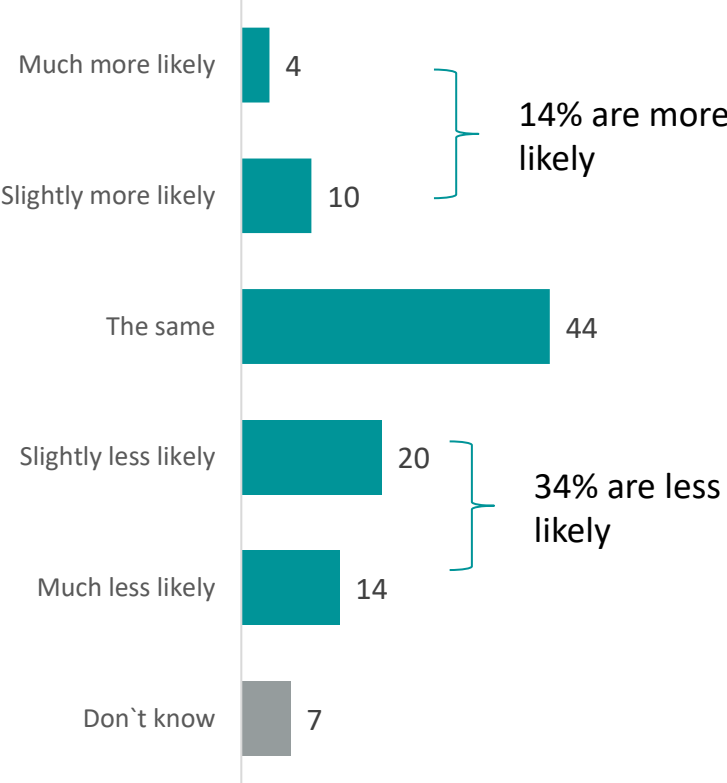


Q49. Knowing the above information, how comfortable are you with what happens to your personal data when you accept cookie preferences?



A third (34%) feel they are less likely to share personal data than the rest of the UK

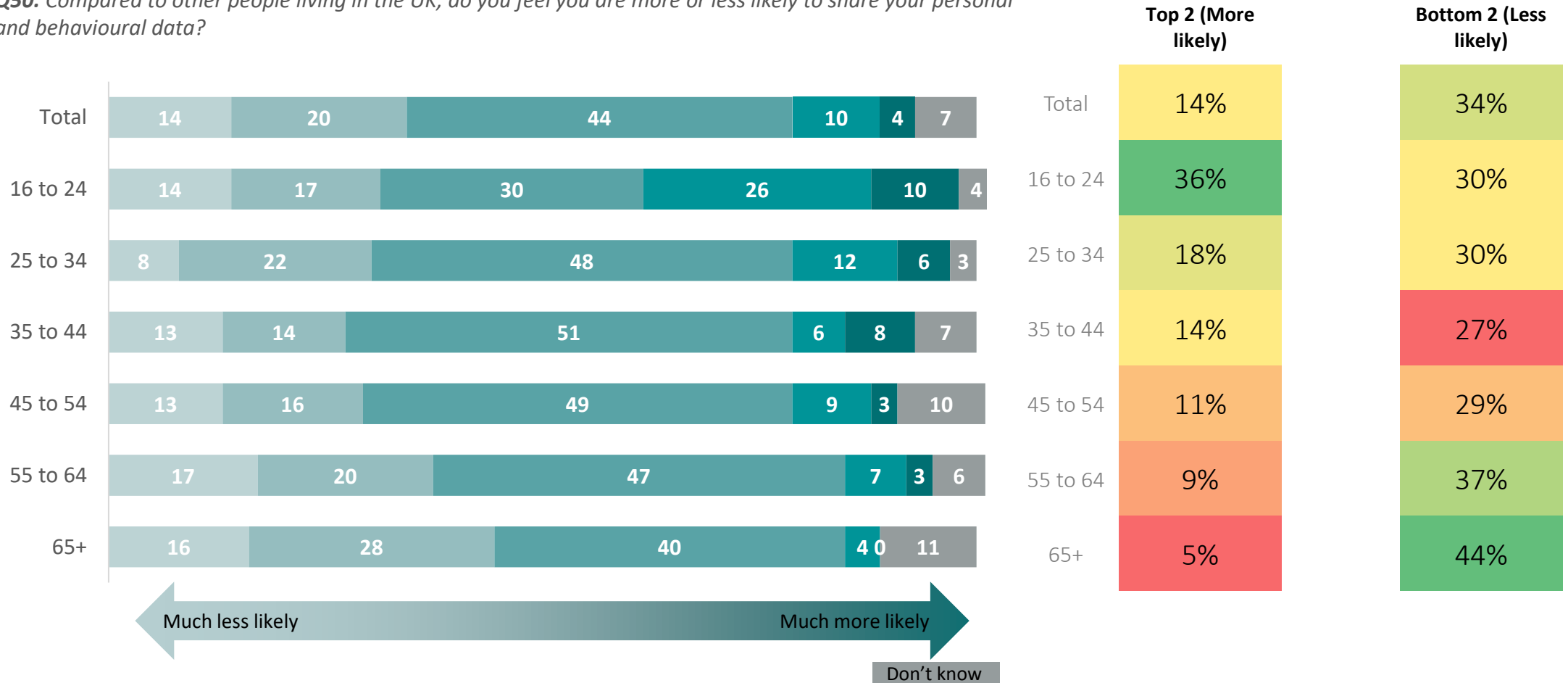
Q50. Compared to other people living in the UK, do you feel you are more or less likely to share your personal and behavioural data?



Base; All participants: 1001.

Similar to previous finding, those under 24 are significantly more likely to think they share more data than other people in the UK, while those 65+ are more likely to think they tend to share less

Q50. Compared to other people living in the UK, do you feel you are more or less likely to share your personal and behavioural data?



Base; All participants: 1001, 16 to 24:103, 25 to 34:147, 35 to 44:142, 45 to 54:175, 55 to 64:159, 65+:226

Summary of findings

Whilst consumers are concerned about sharing their data, this does not always translate into taking action

76%

Never switched companies or providers because of data privacy concerns

68%

Never requested for my personal data to be removed from a company's system



Covid generally hasn't changed attitudes to data sharing at a high level though there is evidence consumers are more comfortable in sharing data with a wider range of organisation types than they were pre-pandemic.



Less than a quarter always read policies around cookies.

Short, simple and concise information would encourage wider engagement.



Location and biometric information is especially sensitive and less likely to be shared, as is mental health data.



Next Steps

- People are more open to data sharing if they can clearly see benefits to them (eg financial incentives, special offers) OR when they have trust in the organizations.
- There is also more openness to sharing data which is perceived as directly relevant (eg medical to NHS, financial to banks).
- Trust can also develop over time, once people have used a company.

Data Privacy wave 2

Understanding and perception of data privacy online - UK

Focus Group Findings



Qualitative Methodology overview

Identify sub-groups

From previous quantitative works, we've identified and recruited 3 main groups of participants:

- High awareness of data privacy
- Medium awareness of data privacy
- Low awareness of data privacy



Homework exercise

Each participants were asked to fill out "homework" about themselves prior to a focus group discussion:

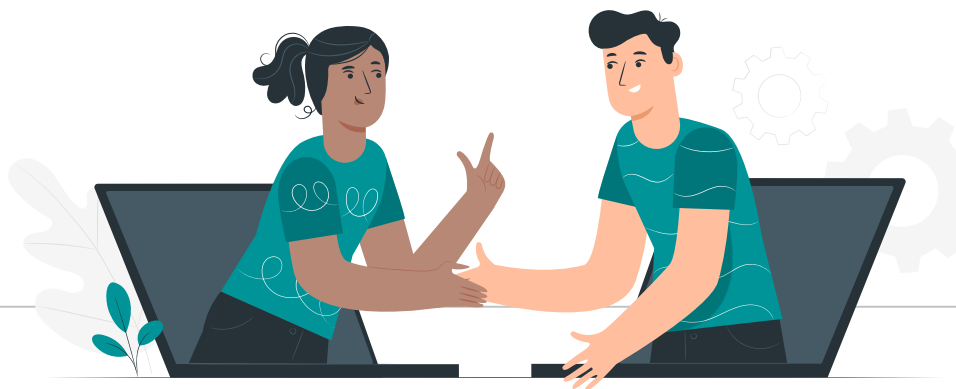
- Me & My way (about themselves and their internet usage)
- Where does it go? (What information is captured when you are online, and by whom, and where does it go?)
- Best brand online (Who do they trust most with their data?)



In-depth group interviews

Three focus groups took place online via Zoom calls, each lasting up to 90 mins. These interviews were focused on:

- General Attitudes and Awareness
- Sector differences and perceived purposes of online brands
- Emerging changes to data privacy
- Online advertising



Please note that where we present qualitative findings, they may combine responses to multiple lines of questioning and probing from focus group sessions. This helps us paint the complete picture and accurately reflect participants' experiences and perspectives. Where possible, we have included in footnotes those questions/probes that were used in capturing the views presented on each slide.

Sample recruitment

Qualitative Stage: 3 x 90 minute Zoom focus groups, each with 6 participants.

Groups were defined by level of engagement with online data privacy.

- 1 x high engagement
- 1 x average engagement
- 1 x low engagement

Question to define group:

To what extent are you aware of the choices around the levels of data sharing and types of permission companies have to ask you for online?

Fully aware <- High engagement

Partly aware <- Average engagement

Not that aware <- Low engagement

Not aware at all <- Low engagement

Recruitment and moderation:

Recruitment was carried out free find by our trusted fieldwork partner and focus groups were moderated by experienced qualitative researchers from Accent.

Incentives:

Each participant received £15 to complete the pre-group task and £45 for joining the group, so each received £60 to take part in total.

High engagement group 26/10/21		Average engagement group 27/10/21		Low engagement group 28/10/21	
GENDER	AGE	GENDER	AGE	GENDER	AGE
Male	20	Female	18	Male	18
Female	21	Male	22	Female	22
Male	31	Gender fluid	22	Female	26
Female	43	Male	51	Male	50
Female	48	Female	55	Female	62
Male	55	Male	65	Male	70

Summary of qualitative findings

Being online

- Overall, there is a high level of dependency on being online and the internet.
- Two main reasons why we love the internet: Able to connect with friends/ family and having instant information and services.

Cookies

- Cookies are seen as a nuisance, and somewhat invasive.
- Consumers in general do not think they can benefit from cookies, and often do not have a choice in their cookie preference.

Data Privacy

- Data Privacy policies are thought to be long, confusing and misleading on purpose.
- There is a general sense that companies collect more data than what consumers are aware of.

Sector Differences

- Some sectors / companies are more trusted than others, especially the NHS and public sector/governmental websites; banking/ finance; or those well-known and well established.

Online advertising

- In general, consumers prefer generic adverts as it allows better exposure to new products and services.
- However, most would prefer to be paid to see targeted adverts if their personal data is collected.

Being online



ONLINE DEPENDENCE

Overall, there is a high level of dependency on being online and on the internet



WHAT TO LOVE?

Access to instant information and the ability to connect with other people are key



WHAT TO HATE?

Consumers feel like they are being watched and tracked. Particularly when it comes to targeted ads.

"I use the internet for everything! Work, recreation, news, comparison sites, fact finding, music, shopping, podcasts, travel... 2-6 hours daily"

"I use the internet for all sorts of things, social media, online shopping, looking at the news and what's going on with the world. I spend roughly around 8 hours a day on my phone and I would say 5 hours of that will be on the internet."

"I love being online for being able to connect with friends and family"

"I love the instant access to information that is relevant and valuable to me."

"I love the access to endless information and social connectivity."

"I hate unwanted adverts , I do not do Facebook as I do not wish my information to be available to the general public"

"I hate cookies!!!"

"Things i hate about being online is the limitless opportunities to search things that shouldn't be available to the public and the fear of being hacked/ my data being used without me knowing"

Knowledge of what personal information is captured



Across the board, there is a sense that **consumers aren't fully clear what information is captured, and what not, and by whom**. Level of concerns and reaction are quite different, especially among the low awareness group.



High awareness

"I'm not fully aware of who can access my data. I'm sometimes informed that my data is not stored and I have to take their word for it that this is the case"

"Have heard that a lot of the data companies receive from people using their sites is sold to people. I am not sure exactly who but I believe large amounts of data are very valuable to businesses etc. It makes me feel concerned as I don't know the extent of the data I am giving these companies or how it could possibly affect me"

Med awareness

"I think it's stored securely, though I'm aware it can be passed on to third parties who can then use it for their own purposes. It makes me feel concerned as I don't actually know who is using my data for what, and I do believe that companies harvest more data than they admit to".

"I am less likely to buy a product that I know has been marketed towards me on social media. It makes me uncomfortable and irritated, I do not like the idea of my personal data being used for others profit without my knowledge and consent."

Low awareness

"I'm not really sure, what I think about what is captured online and by whom. I do have internet security for protection. Don't know what data is collected"

"I honestly have no clue what happens with my data once I share it online, and I do not know where that information is kept or who can access it. That does alarm me, but it's not something that I really think about"

"I think name, where you live, what you look at mostly? I think captured by the people who run the website?? Sometimes it makes me intrigued I guess but it's not anything I've thought too much into before"

Cookies – Understanding

There are some difference between 3 groups when it comes to understanding cookies and its roles

UNDERSTANDING



“Little bits of data that sit on your computer and collect your browsing history... recording and storing everything that you do online”

High awareness

“There are 2 types of cookies. One that only stays with you on the site and record how you use the site, how you move your mouse. And there’s a different type of cookies that can follow you around, which stuck onto your IP address – it can move with you no matter where you go”

“I know you meant to turn them [cookies] off whenever you go buy plane or train ticket, because when you go back, BANG, the price has gone up ”

Med awareness

“I don’t really know what a cookies is, I just know that it is something that’s tracking me and my activities but I don’t know how it works. All I know is if I go on a site and put something in the basket, when I go back to the basket it’d still be there”

“Tracking, observing what you’re doing online”

Low awareness

“I didn’t realise that [cookies] were why all the things came up on Facebook, now I know”

“Cookies hold a lot of information but I don’t understand cookies enough to know what is being held”

Cookies – sentiment

While level of understanding differs, consumers shared similar sentiment toward cookies

SENTIMENT



“I have no idea what they’re doing with my data, what other companies they’re selling it too, what they’re using it for” High awareness group

“I do think they’re too invasive, I wouldn’t necessarily want companies to store my data, not that I’m doing anything wrong ” High awareness group

“Having these little things popping up on your screen is very very irritating” Medium awareness group

“Big brother’s watching, your devices are listening” Low awareness group

“I personally don’t like someone tracking every move I make on my keyboard” Medium awareness group

Invasive /
Insidious
(because
they collect
your data)

“Data is currency, there’s too much money to be lost [if people rejected cookies]” High awareness group

“I’m more than happy to click allow every time, I don’t see what damaging things can happen, it just helps companies with marketing” High awareness group

“I don’t think there’s actually any benefits to the person accepting but tremendous benefits to the people creating the cookies” Medium awareness group

It benefits
companies

“When I’ve pressed don’t allow they’ve actually taken me off the site...so they’re forcing you to give your data so you can view what you want to view...really discouraged me to go on the site again” High awareness group

“I accept them all the time because I don’t want to lose anything” High awareness group

“If you don’t accept they take you off the site” Medium awareness group

Have no
choice but to
accept

Cookies – respond to cookie pop-ups?



MOST OF THE TIME, CONSUMERS WOULD ACCEPT
COOKIES POP-UPS

Participants' comments indicated in “ ”

“If it’s easy to opt out of them I will but often it’s not...but if it’s not easy I’ll just click yes so I can do what I want to do on that particular site” High awareness group

“If I go on less familiar sites I try to manage it as much as possible” High awareness group

“You have to go into cookie settings, which opens up another window, and then click each individual cookie off...I can’t be bothered to do that on a site by site basis” High awareness group

High/
medium
awareness

“I’ve gotten in a bad habit of accepting all cookies” Medium awareness group

“it’s quicker and easier just to accept” Low awareness group

“Get it off the screen so I can carry on shopping” Low awareness group

Low/
medium
awareness

When are cookies accepted?

Trusted, well-established sites

"I'm not too concerned if it's a familiar site"
High awareness group

Necessary / urgent

"If it's that important then I will just press allow"
High awareness group

"It's all about convenience" *High awareness group*

"It really depends on what kind of rush I am in. If I am in a rush and I need the information quickly I'd just accept. But if I have a bit of time I'd go in a select which one I want to share. But even then I am not entirely sure which one I am selecting" *Medium awareness group*



Unfamiliar sites

"I'd rather stick to what I know as it minimises the risks of something going wrong" *High awareness group*

Less trusting

"I am not too concerned with those familiar sites I visit everyday frequently. If it's somewhere less trusting I'd go through to opt out just to recued the amount of traffic that comes up from different searches " *High awareness group*

Cookies – how would you want to respond to cookie pop ups?

Blanket setting for cookie preferences

Most consumers wished for a “blanket” setting on their phone or browser to set their cookies preferences, instead of doing it site-by-site

“I’d be interested to see how it could be done better, it’s such a laborious thing all the time, sort of a blanket setting that could be applied universally” **High awareness group**

“If I could manage it site by site or app by app I would definitely take the time to make my data more secure” **High awareness group**

“If I could do it [edit cookies setting] once a year then that would be enough” **Medium awareness group**

However, some are skeptical of this possibility because it will stop companies from collecting data for marketing and sale purposes

Doubtful that will happen

“But I couldn’t see it happening, there’s too much money to be lost by big brands trying to market to you” **High awareness group**

Data Privacy policies – perception

01

Data privacy T&Cs are **longwinded and complicated ON PURPOSE** to stop people from reading it

“The worst bit for me is the expectation that we’re responsible for our data and we’re giving permission for our data to be sold on”
High awareness group

“I don’t think I’ve ever read the T&Cs in full ” *Medium awareness group*

“It’s a 50-50 situation. Half of the time I cannot be bothered [to read] because it’s not straightforward” *Medium awareness group*

03

Similar to accepting cookies, **accepting data privacy policies is “a mean to an end”** so they can access the site

“it’s a catch 22, you have to agree to it to proceed, they have you over a barrel” *High awareness group*

“it’s too much hassle” *Low awareness group*

“It’s misleading, it might state something but as soon as you agree to it you’re agreeing to a load of conditions you don’t really know about” *High awareness group*

“It’s like opening a box of paracetamol, it’s so long-winded, they do it on purpose because they don’t want you to read it” *High awareness group*

02

Consumers feel they **do not have a choice or control** over how their personal data is processed by companies



To share – or not to share – Why you trust a website?



“It’s NHS isn’t it? They are not gonna do you dirty”

“That’s totally personal information isn’t it, surely the NHS can’t go off sharing that”

“it’s nothing to do with their [data] privacy policy, these are trusted brands that we use...I trust John Lewis as a brand”

“these are brands we’re using daily with no negative experience”

Social media companies not universally trusted



“[social media] I don’t trust them at all, it goes back to them selling your data...they lied about it” **High awareness group**

But consumers continue to use it to connect



“Social media is a bit of a blessing and a curse, isn't it? If you don't use it you wont know what's going on with your friends, but it doesn't mean it's good for you” **Medium awareness group**

Trusted, well-established company



Government/ high level of security



Frequency used with no problems



Emerging changes to data privacy – COVID pandemic

“The way COVID has affected us is online shopping” *High awareness group*

“During lockdown I am literally on Amazon. Amazon was number 1 for me” *Medium awareness group*

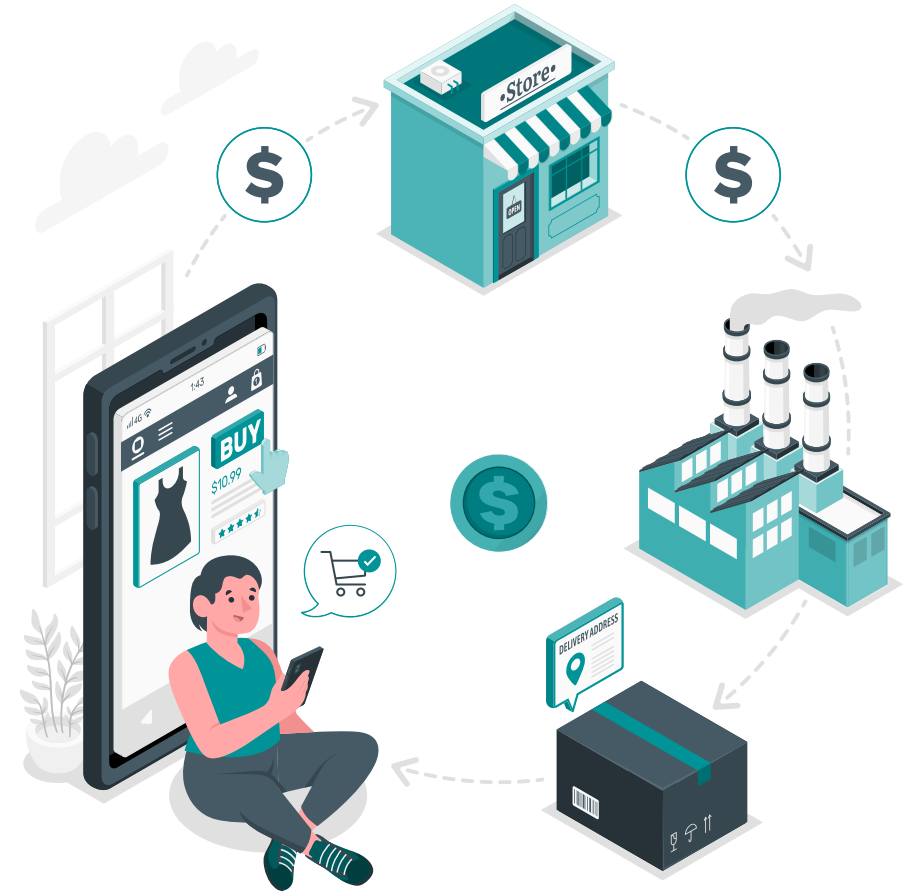
“We were spending much more time online, so these companies were getting much more specific data”
High awareness group

“During lockdown there was nothing for me to do, I was bored. I was on my phone 4, 5 hours a day doing nothing. And yeah, I know a lot more of my data was being recorded but there was nothing else to do”
Medium awareness group



Among high/med awareness groups, consumers understand that the increase in online shopping during the pandemic has led to an increase in the amount of personal data being capture

However, they had to accept this out of necessity



Sharing for the greater good



Low awareness did not even think about the data implications of restaurant apps and NHS apps “at that point we were just happy to get out of the house”

Low awareness group

Aware and slightly annoyed that they had to share location

“Sharing voice data and location data is uncomfortable”

“When I see it [location pop up] I would click “no”. I don’t see why companies have to know my location.”

But accept this for the greater good

“[sharing location for track and trace] I am totally fine with that. Regards to other people’s health and my own health, I am willing to sacrifice a little bit of my privacy”

“it would be good to understand how it actually works, but it’s COVID man, I will always do what the NHS tells me to do”

“For a good enough reason, yes, for the better good then I am ok with that. But generally I would totally avoid sharing my location”

Participants’ comments indicated in “” 

Online advertising – general attitude



Overall, consumers prefer generic advertisements

No personal data is collected. No sense of being manipulated

Exposed to products and services they normally would not be aware of

Tracking particularly through picking up voice data is unnerving

“I definitely say “generic” because I don’t want to feel like I am being manipulated”

“Generic. I am the same as everyone. Nobody wants stuff forced down their throat. It’s like someone outside your door trying to push something through the mail box and you’re trying to push it back”

“We’d been messaging each other saying “white girl wasted” and Alexa said this phrase back to my friend...I’ve absolutely no idea how that has found it’s way onto Alexa, it’s concerning”


“I prefer generic because want to be directed to different things. I don’t want to see the same thing over and over”

I want to see generic ads because I don’t like the thought that they use my information to target me. I am less likely to buy a product if I know it’s been targeted toward me”


Participants’ comments indicated in “ ”

However, if they had to choose, consumers almost always wanted to be paid

- Scenario 1: You pay to stop seeing targeted ads
- In this scenario **you pay £1 a month**
- **Your personal data not to be tracked** for online advertising purposes.
- You only see **generic adverts**.



- Scenario 2: You get paid to see targeted ads
- In this scenario **you get paid £1 a month**
- **Your personal data to be tracked** for the purposes of tailoring the online advertising you see to you.
- You see **personalised ads**.



"...in all fairness I don't mind having ads catered toward me, if anything I prefer it"

1

PAID ENOUGH TO USE THE INTERNET AS IT IS

"..it's my data and if I can get paid for them to leverage it then I'm ok with that"

"I'm a student, I am broke. If they're paying me money they can take my data for it"

"For all that they're getting from me I think at least £20. But I rather get paid than having to pay anything"

"I am definitely not paying anyone [to use the internet]"

2

ALREADY WATCHING ADVERTS

"I'm already watching adverts, you might as well pay me for it"

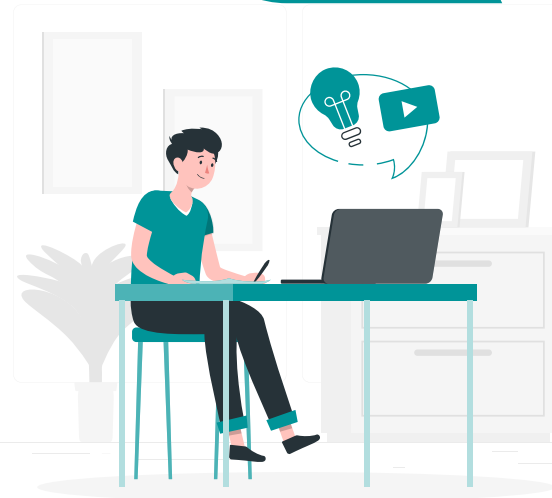
"It's the lesser of two evils. Gods know where else they collect my data"

"If I get personalised ads, might as well be paid for it"

Children being online



Overall, there is a sense that it is concerning for children to be online, and to share their data online. However, this seemed to be “they way of the world” and there is little to be done. Consumers expect big tech companies to take responsibility to safe-guard children online.



It is important to use social media

“Facebook for me is a memory bank, I uploaded pictures of my daughter on there since the day she was born, and it’s been 14 years.”
High awareness group

Adults should not share children’s information on social media

“I don’t think companies should be able to share data of anyone who is under 16 by law”
High awareness group

“Your kids are minors. They cannot consent to post their information on the internet anyway, so I wouldn’t do it” *Medium awareness group*

“There has got to be a responsibility with parents” *Low awareness group*


Danger of sharing on social media

“It’s bad [to post info about children on social media]. I know a horror story from my school. There’s a girl, 12 or 13. Her parents post a picture of her on bikini on holiday and she got contacted by a stranger on the internet” *Medium awareness group*

“You hear terrible stories about these kids. Sexting, etc. The more information about your kids you can keep off the internet, the better”
Medium awareness group

Responsibility is with big-tech companies

“I think it’s the social media platform’s responsibility ultimately. Because the reality is, they are the only one who can do anything. I don’t think the government can do anything. These private social media platforms are just too big” *High awareness group*



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