

Has lockdown made consumers more open to privacy?

EY Global Consumer Privacy
Survey 2020



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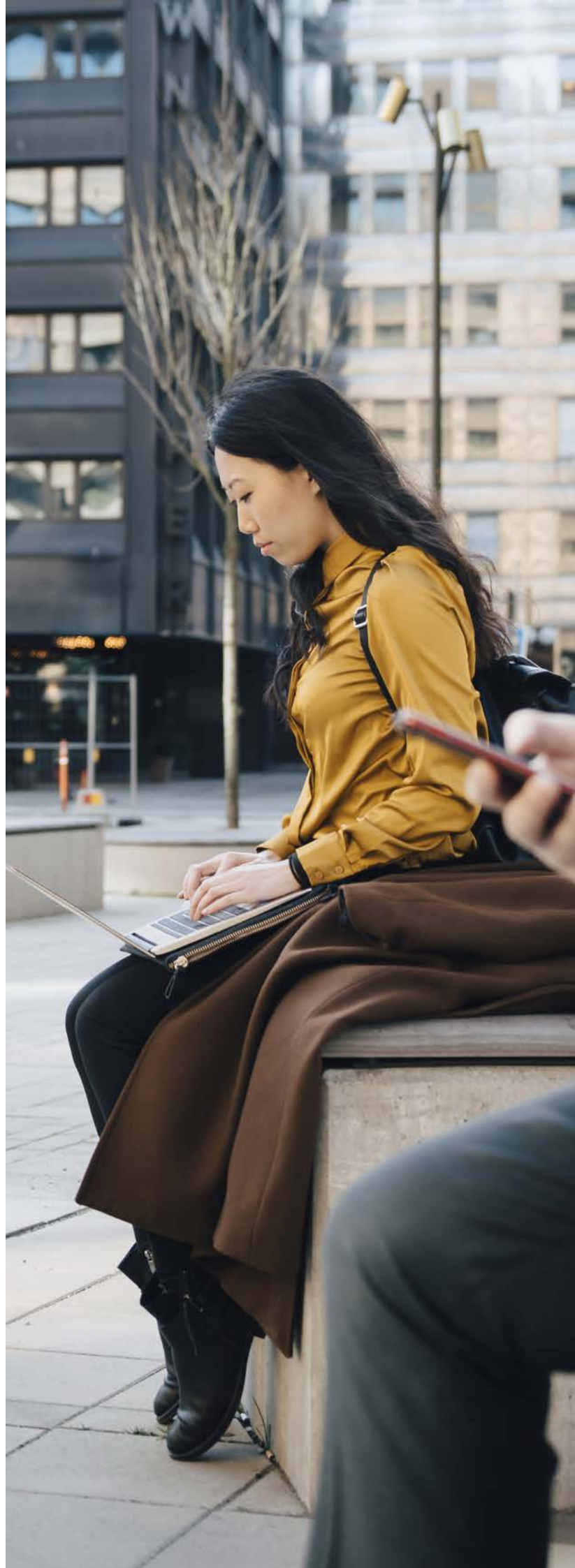
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A person is sitting at a desk, viewed from the side, with their legs crossed and resting on a dark blue laptop. The person is wearing a white top with a purple pattern. The background is a kitchen with a white countertop, a stove, and a pot on the burner. The scene is dimly lit, creating a soft, focused atmosphere.

Expect, exchange, evolve
The key findings from our
research



The COVID-19 pandemic has rapidly accelerated our reliance on digital services and platforms as we transition abruptly to new ways of living and working. It has also shifted the parameters of what consumers expect in return for their personal data and their willingness to share it, and how they want organizations and institutions to gather and process that data.

The *EY Global Consumer Privacy Survey 2020* seeks to unpack these changing consumer attitudes and build on the research findings of *Privacy in the Wake of COVID-19*, an extensive survey of privacy leaders, launched in conjunction with the International Association of Privacy Professionals (IAPP) in May 2020 and a further report charting the views of privacy leaders in October 2020. Our latest survey highlights the extent of the shift taking place in the data privacy landscape: 54% of consumers say COVID-19 has made them more aware of the personal data they share than they were before the pandemic. “The COVID-19 discussion around data sharing and how it can help fight the virus has created more consumer awareness about privacy,” says Tony de Bos, EY Global Data Protection & Privacy Consulting Leader. “Now, the conversation is more about transparency and the value exchange, rather than just handing over the data.”

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Companies must get in front of their digital strategies to make certain that, as things stabilize, they will be able to deliver on consumer expectations.

Angela Saverice-Rohan
EY Americas Privacy Leader

Consumers crave certainty despite an uncertain outlook

While the COVID-19 pandemic may have ushered questions of uncertainty in the way consumers think, act and behave, it has not changed their attitude toward the fundamentals of data privacy. Security, control and trust remain key. According to our survey, the most important factors among consumers when they share personal data with an organization is secure collection and storage (63%), followed by control over what data is being shared (57%) and trust (51%) in the firm. If these assurances are not provided by organizations, they will seek them elsewhere.

Consumers want their data to help others

Altruism is an increasingly powerful force in the data value exchange. According to our survey findings, more consumers are seeking out organizations that use their data to help others – as long as they are adequately protected and remain in control of what they share. Exactly half (50%) of consumers surveyed say that the pandemic has made them more willing to part with their personal data, especially if they know it is contributing to the research effort and/or community wellness. There appears to be a significant opportunity here for organizations in both the public and private sectors to build trust with consumers.

However, the survey also reveals a gap between aspirations and behavior. For example, the majority of respondents (67%) say that those who test positive for COVID-19 should be required to disclose relevant location data.

And they know their data rights

In parallel, the relationships consumers have with their governments, brands, and employers are shifting. Consumers know their rights, and businesses need to respond. Today's consumers say that high-profile data breaches such as those that have taken place in the technology, aviation and hospitality industries (43%), and the COVID-19 pandemic (43%) are driving their awareness of data privacy more so than regulatory changes (25%).

"Prior to COVID-19, the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) were already grooming consumers to demand transparency and expect some level of control over their data," says Angela Saverice-Rohan, EY Americas Privacy Leader. "Companies must get in front of their digital strategies to make certain that, as things stabilize, they will be able to deliver on consumer expectations."

Where do we go from here?

Here, we look more closely at the survey findings and find out what they mean for businesses and consumers amid the pandemic and beyond. How are consumer attitudes toward data privacy, collection and processing set to change in the long term? Where is the tipping point for consumers between holding on to their data and sharing it freely?

And, crucially, how can businesses ensure that their data privacy policies meet consumers' demands? We find that they need to:

- ▶ **Balance benefits with security and control to build consumer trust**

For more than half of consumers, control is key to winning trust (and losing it).

- ▶ **Align their data privacy regulation with the value-exchange imperative**

The majority of consumers are willing to share their personal data in certain circumstances, if there is a specific perceived benefit in return.

- ▶ **Mind the intention-behavior gap**

While the growing trend of altruistic data sharing has the potential to unlock significant benefits for companies, governments and consumers alike, businesses and public agencies must heed the disconnect between the data sharing behavior that consumers expect from their peers and their own level of comfort to share personal data to aid the recovery effort.

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The COVID-19 discussion around data sharing and how it can help fight the virus has created more consumer awareness about privacy. Now, the conversation is more about transparency and the value exchange, rather than just handing over the data.

Tony de Bos

EY Global Data Protection & Privacy Consulting Leader



The expectation: How do consumers expect organizations to treat their data?

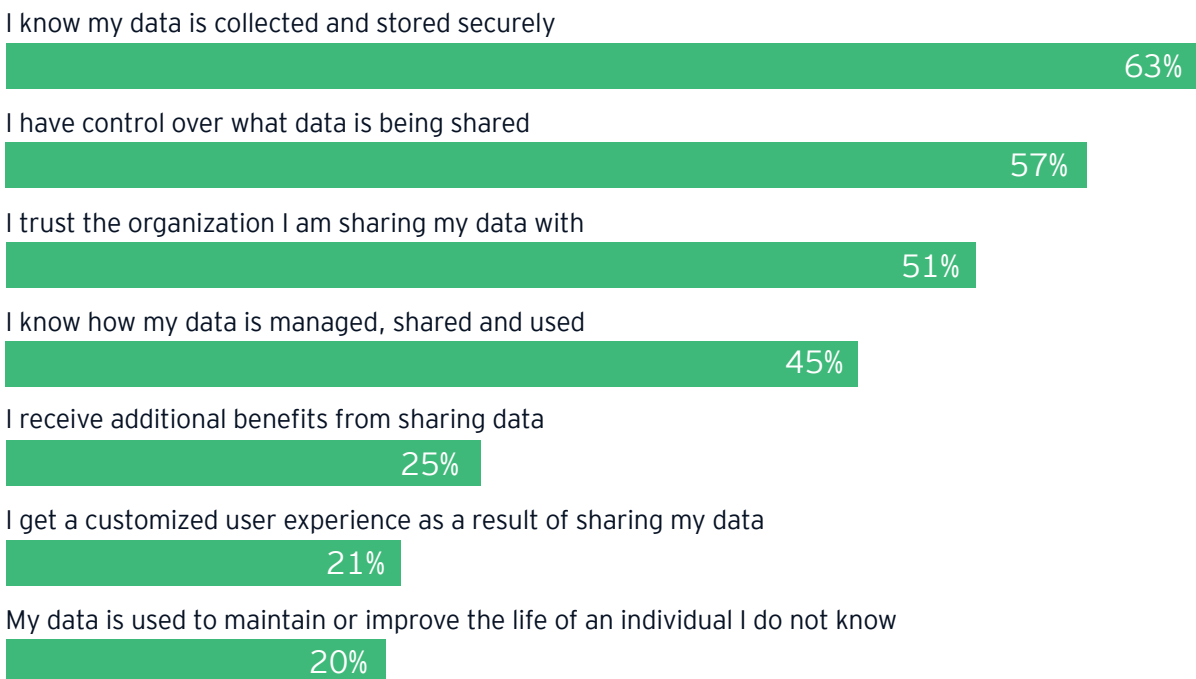


Despite the ongoing uncertainty and disruption caused by the global pandemic, most consumers say they will continue to rely on the organizations they already interact with to collect, process and manage their data securely and transparently. “Post COVID-19, consumer expectations of companies have not changed: they expect them to respect their privacy,” says Angela Saverice-Rohan, EY Americas Privacy Leader. “From a consumer perspective, this means that their data shouldn’t be used in a way that disadvantages them or that risks exposing their data to a bad actor.”

Security is paramount

The pandemic has ushered in significant changes that may have altered consumers’ attitudes toward data privacy, but they are unwavering about the importance of security. The majority say that the most important factors when they share personal data with an organization is secure collection and storage (63%), followed by control over what data is being shared (57%) and trust (51%) in the firm (see figure 1). Similarly, an organization’s ability to counter data breaches and cyber attacks ranks second as the factor most likely to boost consumer confidence.

Figure 1: Proportion of consumers that rate the following factors as most important when choosing to share their personal data with an organization



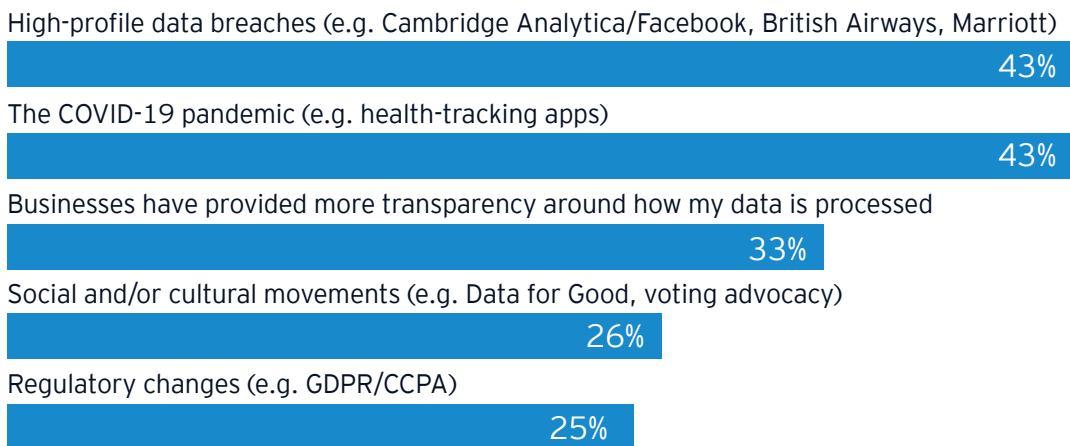
**Respondents were asked to select their top three responses.*

Just as the human brain is hardwired to focus more on negative events than happier experiences¹, adverse data privacy conditions build consumer awareness more quickly than favorable ones. In 2018, data breaches at the world's largest technology companies led to a widespread "techlash" – "growing animosity toward large Silicon Valley platform technology companies and their Chinese equivalents," as defined by the *Financial Times* in its 2018 Year in a Word – and eroded trust in social media companies and the data and analytics industry. That is borne out in the survey: respondents say that high-profile data breaches and COVID-19 are the biggest drivers of data privacy awareness (both 43%), ranking them above regulatory changes including the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) (25%) (see figure 2).

More than half of consumers (54%) say that COVID-19 has made them more aware of the personal data they share than they were prior to the pandemic (see figure 3). This rises to 58% among those in Asia-Pacific and the Americas but falls to just 49% of consumers in EMEIA. This suggests that GDPR had already increased awareness of data privacy in the region before the pandemic took hold.

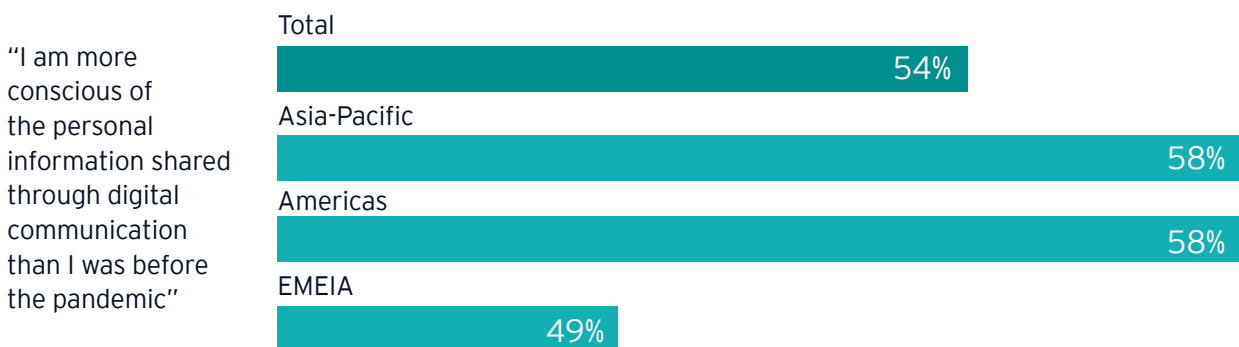
Views on data privacy awareness also diverge according to age group: 34% of Baby Boomers and 25% of Generation X say that none of the factors listed – including high-profile data breaches or the COVID-19 pandemic (see figure 2) – have increased their awareness of how organizations use their data, compared with 16% and 15% of Millennials and Generation Z. "As younger generations tend to be much more tech savvy, they are more likely to have a greater awareness of privacy and sharing data than some older generations," says Tony de Bos, EY Global Data Protection & Privacy Consulting Leader. "Generally speaking, older generations tend to be less familiar with what's being done with their data."

Figure 2: What has increased consumers' awareness of how organizations use data?



*Respondents were asked to select all responses that applied.

Figure 3: Proportion of consumers that agree with the following statement, analyzed by region



*Respondents were asked to select all responses that applied.

¹ <https://www.nytimes.com/2012/03/24/your-money/why-people-remember-negative-events-more-than-positive-ones.html>

Vigilance varies by generation

Perceived benefits, such as an improved healthcare experience or retail discount, can encourage consumers to part with their data. But many are still vigilant about privacy. In the past six months, 45% of consumers have taken the time to understand how a company uses their data, 36% have shared health data related to COVID-19, and the same proportion have chosen not to provide personal data or asked a firm to remove their data due to reputational concerns around its use.

Millennials (53%) and Generation Z (47%) are more likely than Generation X (43%) and Baby Boomers (35%) to regularly take the time to understand how a company uses their personal data by reading available materials. The younger respondents also share their data more freely. For example, 50% of Millennials and 42% of Generation Z are open to sharing their search histories with a large tech company in return for more personalized search results and online experiences, compared with just 23% of Baby Boomers. And in the past six months, 45% of Millennials and 49% of Generation Z have always or often shared COVID-19 health data with an organization, compared with just 21% of Baby Boomers.

Younger consumers are also more discerning. In the past six months, 38% of Millennials and 31% of Generation Z have always or often submitted a request to an organization to find out what personal data of theirs they hold and/or to have their data deleted, compared with just 9% of Baby Boomers. Younger consumers, says de Bos, have “a better feel for data and privacy than older generations, who find it complex and tend to just hold on to their data.”

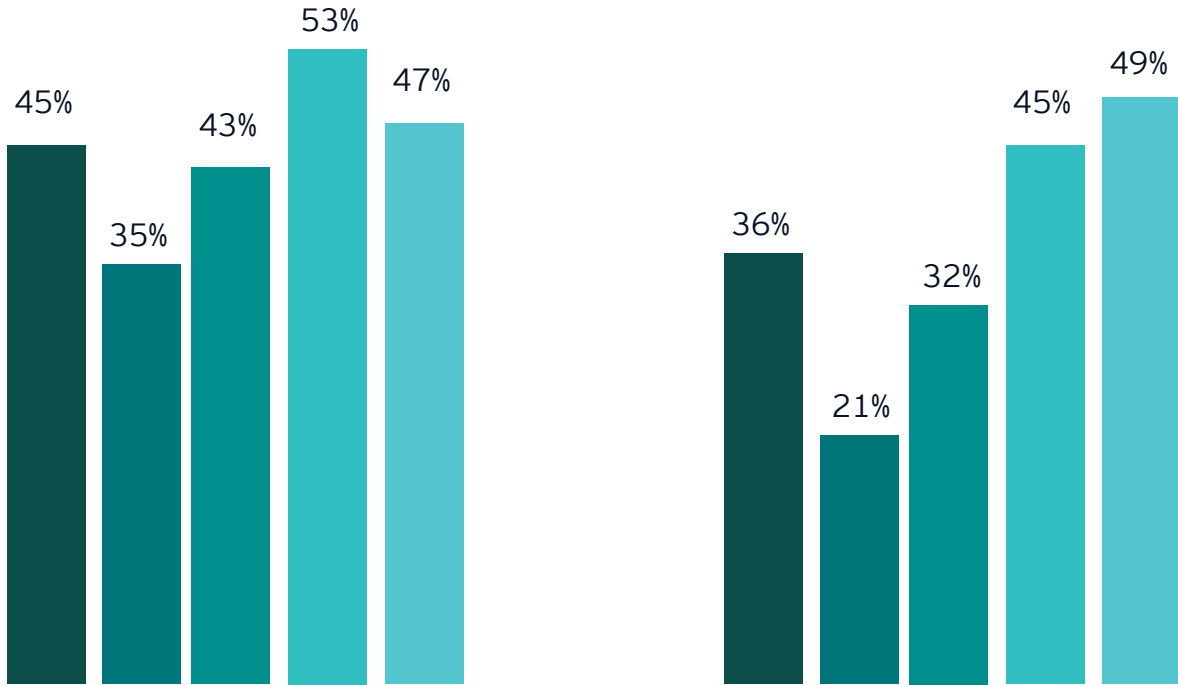
When consumers weigh up privacy and data collection, says Saverice-Rohan, fairness is another consideration – particularly for Millennials. “They ask, ‘Is it appropriate for a company to use as much data as possible to offer products at different price points to different people? Isn’t that disadvantaging me? And why should they be able to use my data in such a way?’,” she says.

Just as views on data privacy diverge among different generations, political partisanship also appears to shape attitudes. See “The great data divide: Privacy, power and the political pendulum” on page 29 for more.



Figure 4: Proportion of consumers that have always or often done the following in the past six months, analyzed by generation

■ Total ■ Baby Boomers (56-75) ■ Generation X (40-55) ■ Millennials (24-39) ■ Generation Z (18-23)



Taken the time to understand how a company uses my personal data by reading available materials

Shared health data related to COVID-19 with an organization

**Due to rounding, figures may not add up to 100 percent.*



Control inspires consumer confidence

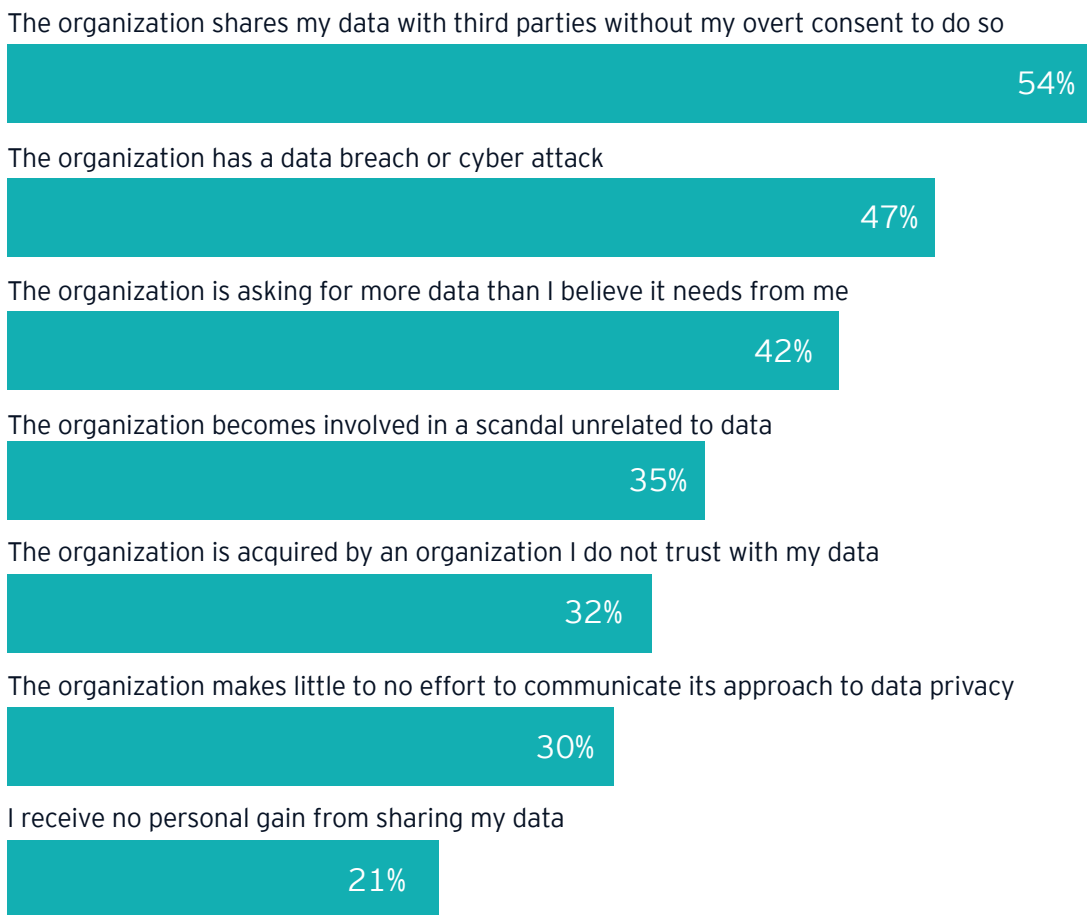


While younger consumers have a more nuanced understanding of data privacy, older generations are acutely interested in the control they have over their data. When they decide whether to share their information with an organization, 62% of Baby Boomers say that control over what data they share is one of the most important factors, compared with 58% of Generation X, 56% of Generation Z and 51% of Millennials. And 66% of Baby Boomers - the highest of all the generations - say that lack of control over third party access to their data is the primary factor that would decrease their trust in an organization.

Divergence between statements and actions is also most pronounced among Baby Boomers: 70% say that knowledge about secure data collection and storage is crucial, yet in the past six months 40% have never taken the time to understand how a company uses their personal data by reading available materials, compared with just 21% of Generation Z.

So, data security and control influence many consumers' confidence in sharing data, but for a quarter of respondents there could be a way around that: personal benefits are key to winning trust with 27% of consumers. But organizations need to strike a balance: 42% of respondents say that being asked for more information than they perceive necessary would decrease their trust in an organization.

Figure 5: Factors most likely to decrease the level of trust consumers place in organizations to collect, store and use their data



**Respondents were asked to select their top three responses.*

Trust: the shifting dial

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Post COVID-19, consumer expectations of companies have not changed: they expect them to respect their privacy. From a consumer perspective, this means that their data shouldn't be used in a way that disadvantages them or that risks exposing their data to a bad actor.

Angela Saverice-Rohan

EY Americas Privacy Leader

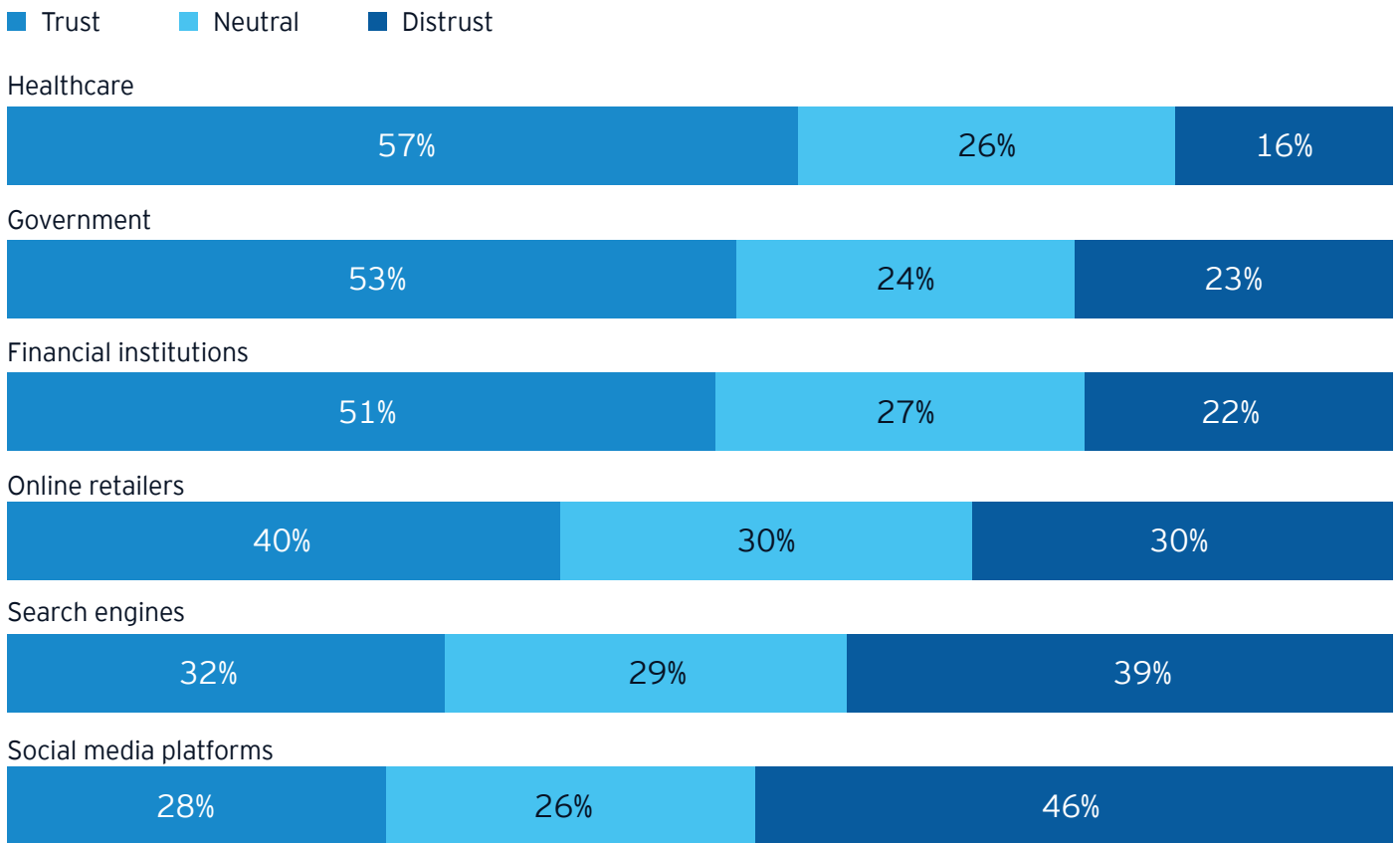
Trust does not just vary according to the age, political persuasion and location of the consumer - it also depends on the type of organization. Consumers in the survey trust healthcare providers (57%) and governments (53%) most to use their data for no purpose other than as stated, and search engines (32%) and social media (28%) least. Trust in healthcare providers rises to 60% among those in Asia-Pacific, and trust in the government drops to 43% in the US - the lowest of any country or region in the survey.

In fact, more than a third of Americans (34%) say they do not trust the government to use their data as stated and for no other purpose - a higher level of distrust than in financial institutions (23%). In EMEA, levels of distrust in the government and healthcare providers for data use are broadly the same, at 19% and 18% respectively, and in Asia-Pacific they drop to 16% and 12%.

Trust also decreases with age. Of Baby Boomers, just 14% trust social media platforms with their data, 20% trust search engines, 55% trust government and 51% trust financial institutions. Among Millennials, trust in tech is more than double that: 37% trust social media platforms and 43% trust search engines. They do share something with the Baby Boomers, however: Millennials also have higher levels of trust in government (55%) and financial institutions (54%).

“When we are younger, we are more trusting in general,” says Saverice-Rohan. “As we age, we have a lot of experiences with various institutions, employers, the government, and how we see ourselves in society changes. It's harder for organizations on the other side of that, and they have to do more to gain our trust.”

Figure 6: Proportion of consumers that trust the following organizations to use their personal data as stated, and not for anything else

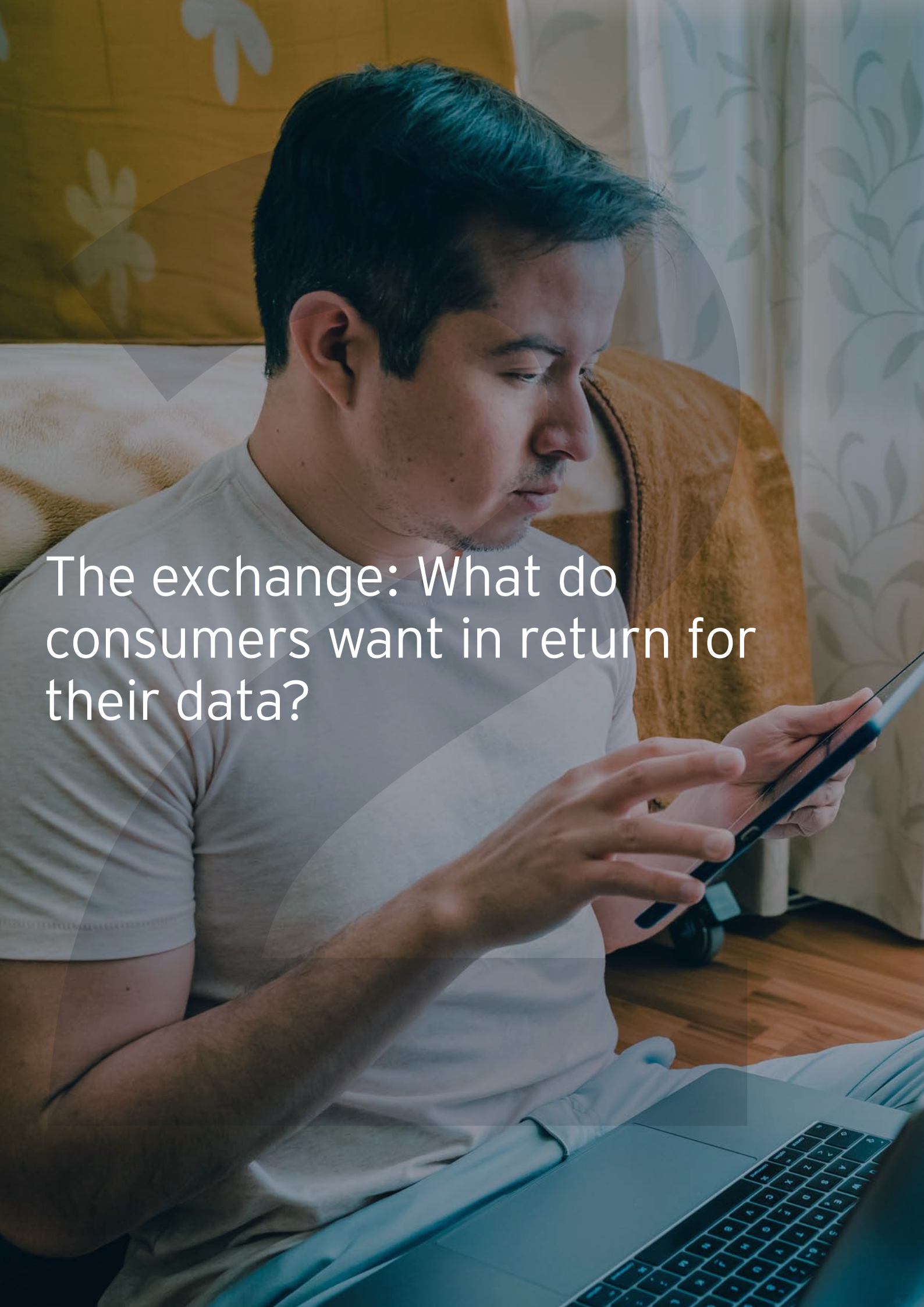


**Due to rounding, figures may not add up to 100 percent.*

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Younger generations tend to be much more tech savvy, they are more likely to have a greater awareness of privacy and sharing data than some older generations. Generally speaking, older generations tend to be less familiar with what’s being done with their data.

Tony de Bos
EY Global Data Protection & Privacy Consulting Leader

A man with dark hair and a light beard is sitting on a brown leather couch. He is wearing a white t-shirt and is looking down at a tablet computer he is holding in his left hand. His right hand is raised, with fingers spread, as if gesturing or interacting with something. In the foreground, the keyboard of a silver laptop is visible. The background shows a yellow wall with a floral pattern and white curtains with a leaf pattern. The overall lighting is soft and indoor.

The exchange: What do consumers want in return for their data?



From video conference calls to community messaging groups and health tracking apps, data usage and analytics have exploded in 2020. That is a result of dramatic changes to the way we work, socialize, entertain and educate ourselves, but it also comes with the territory as governments seek to test, trace and impose restrictions in the hope of stemming COVID-19. As consumers' digital footprints expand, their attitudes to data sharing and the data privacy landscape are changing.

Data sharing in an altruism economy

Amid reports of panic buying and profiteering during the global health crisis, there have also been remarkable acts of altruism - and that behavior is reflected in the survey findings. One in two (50%) consumers are willing to hand over their personal data if it will help toward the COVID-19 research effort and/or community wellness.

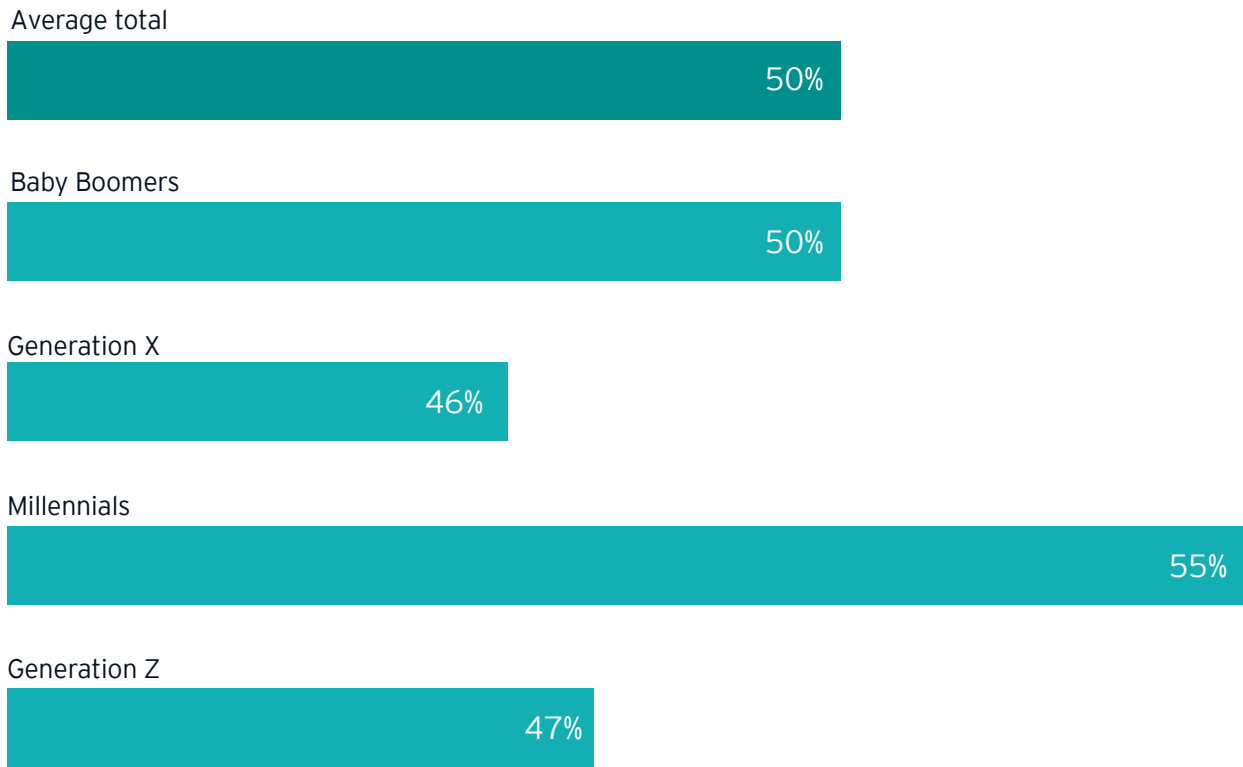
Much has been written about a lack of altruistic behavior among Millennials, and in 2013 *TIME* magazine described them as "The Me Me Me Generation."² But our survey suggests that altruistic data sharing is most common among younger consumers: 26% of Millennials and 22% of Generation Z say that helping to maintain/improve the life of someone they do not know is one of the three most important factors when they share their data with an organization. This compares with just 19% of Generation X and 14% of Baby Boomers.

Altruism appears to be a growing trend among younger consumers, but can it endure when the pandemic stabilizes, when it trails security, control and trust in the top three factors of importance in data sharing? "Altruism is a key driver for data sharing, and that could continue," says Angela Saverice-Rohan, who says there could be an opportunity here for brands to invest in benevolent initiatives. But she sounds a note of caution: "Ultimately, the shelf life of altruism as a motivation will be dependent on the problems that we show we can solve, societally, as a result of that data sharing."

² <https://time.com/247/Millennials-the-me-me-me-generation/>

Figure 7: Proportion of consumers that agree with the following statement, analyzed by generation

“The COVID-19 pandemic has made me more willing to share my personal information - especially if I know it’s contributing towards the research effort and/or community wellness”



The rules of the exchange

Altruism aside, when it comes to trading data, context matters. As with trust, the value exchange differs according to the industry and organization. Two-thirds (65%) say they would share medical information with a medical institution to improve their healthcare experience, and 54% would share demographic data with a retailer in exchange for discounts. But only 39% would share their online search history with a large technology company in return for more personalization, which might reflect society’s unease about data breaches and the power of Big Tech.

Attitudes toward the value exchange also vary by location: Asia-Pacific (22%) and EMEIA (25%) consumers are less likely to point to additional benefits as an important factor when exchanging personal data than those in the Americas (27%). “Privacy has been much more part of our history and culture in Europe than some of the other regions”, says Tony de Bos, who suggests that it predates the regulatory intervention of GDPR. “If you compare it with the US, for example, there is more emphasis on the value exchange.”

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Altruism is a key driver for data sharing, and that could continue. But ultimately, the shelf life of altruism as a motivation will be dependent on the problems that we show we can solve, societally, as a result of that data sharing.

Angela Saverice-Rohan
EY Americas Privacy Leader

Figure 8: Proportion of consumers that agree with the following statements about where and why they are willing to share personal data

I would share my medical history with a medical institution (public or private) if it improved my healthcare experience



I would share demographic data (e.g. ethnicity, income) with a retailer in order to receive occasional coupons or discounts



I would share information about my children's health if it meant they could safely return to school sooner



I would or allow a retailer to track how long I spend in different areas of a store for expedited checkout



I would share my online search history with a large tech company in return for more personalized search results and/or online experiences



**Due to rounding, figures may not add up to 100 percent.*

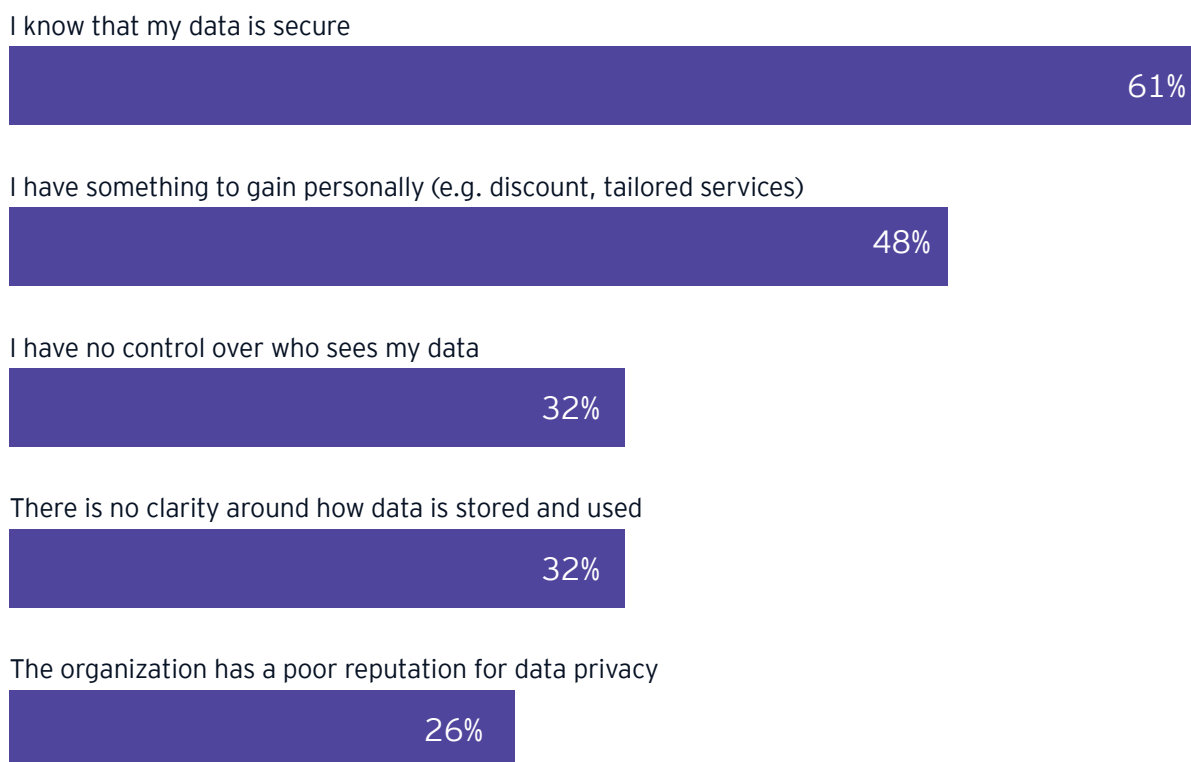
A tipping point for value

Whether they are sharing basic contact details or more intimate medical and financial information, the majority of consumers still say that security is critical. But there appears to be a tipping point for the more basic information: consumers are twice as likely to feel comfortable sharing their basic contact details in exchange for discounts or tailored services than they are any other kind of information.

More than a quarter (26%) of respondents would even share basic contact details with an organization that has a poor reputation for data privacy. And 32% of consumers say they would share contact details despite having no control over who sees that data, or clarity about how it will be stored and used (see figure 9).

Individuals tend to believe that much of the information they share is de-identified, which could explain this. “They may have built in the assumption that their data sharing is anonymized and aggregated,” says Saverice-Rohan. “So in those instances, they’re not even thinking about how it would potentially impact their privacy.”

Figure 9: Percentage of consumers that are comfortable sharing contact details in the following circumstances



**Due to rounding, figures may not add up to 100 percent.*

A hand holding a slice of chocolate cake with a lit candle, overlaid with a large semi-transparent number 4. The background is a blurred indoor setting. The text is white and positioned on the left side of the image.

The evolution: How is data privacy shifting in a post-pandemic world?



The COVID-19 pandemic has boosted consumer awareness of data privacy and processing, and businesses must align their data privacy regulations with these expectations. According to Angela Saverice-Rohan, the stakes are high - and consumers can be persuaded. "Reopening the economy and getting people back into the office, into stores and into schools has and will require new collection of personal information," she says. "Individuals are more willing to accept this, because they recognize why they have to do it."

COVID-19 and the intention-behavior gap

However, there is a problem with that apparent willingness. Certain consumers may be more open to handing over personal data if there is a clear public benefit, but our research shows that there is a gap between intentions and behaviors.

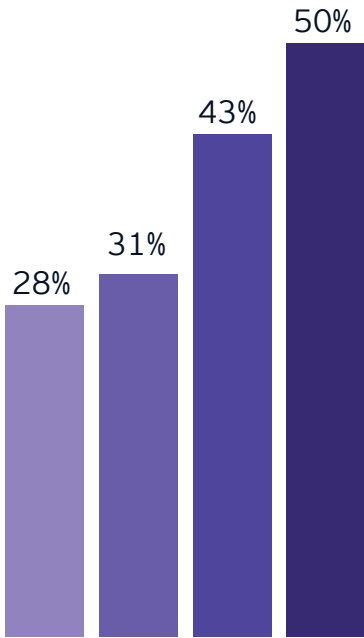
More than a third of consumers (35%) say they have not shared their own data in the past six months to curb the spread of COVID-19. That rises to 49% of Baby Boomers (compared with 19% of Generation Z and 24% of Millennials) - despite the fact that Baby Boomers are the most likely age group to say that those who test positive for the virus should be required to disclose relevant medical or location data (see figure 10).

More than a third (36%) of all consumers said they have informed family and friends of their quarantine habits, 24% have used a government-backed tracking app and only 20% have informed their employer of their COVID-19 status and recent contacts in the past six months. And while 47% of respondents would share information about their child's health if it meant they could safely return to school sooner, just 17% have informed their child's school about their family quarantine habits and recent contacts.

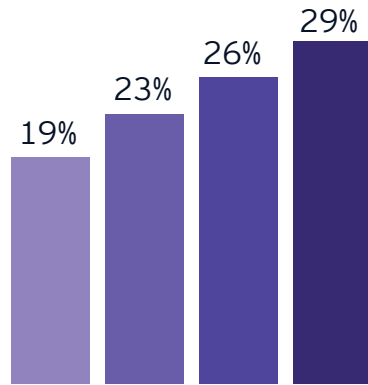
"In primary and secondary education settings, you want maximum transparency from a school about every measure being taken to ensure a child's safety," says Saverice-Rohan. "On the other side of that same coin, we see a high degree of discomfort from parents about sharing personal information about their child and the risk/reward of doing so, and that will be a challenge for how society manages schools post-pandemic. "There needs to be some very open communication in communities about these issues," she says. "And how important it is for us all to share this information."

Figure 10: Proportion of consumers that have done the following in the past six months due to the spread of COVID-19, analyzed by generation

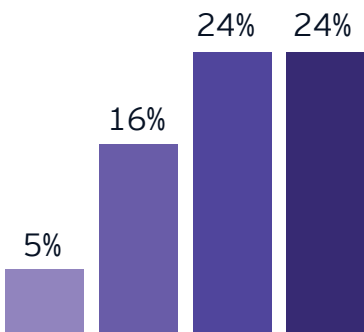
■ Baby Boomers (56-75) ■ Generation X (40-55) ■ Millennials (24-39) ■ Generation Z (18-23)



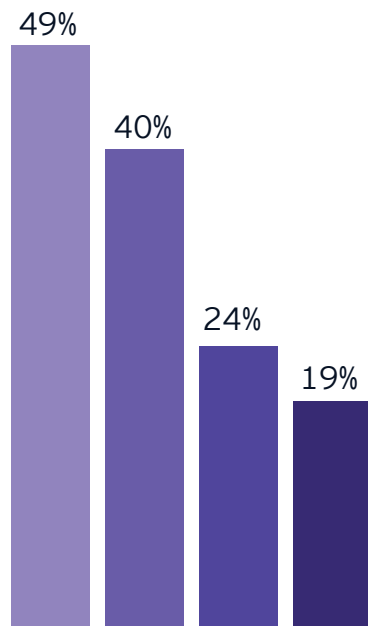
Informed their family and friends of their quarantine habits and recent contacts



Used a government-backed contact-tracing app



Informed their child's school of their family's quarantine habits



None of the above

Data culture: A regional snapshot

When the EU's GDPR came into force in 2018, data privacy was seen by many businesses as a regulatory burden that would lead to increasingly onerous data protection requirements. GDPR also appears to have made those in EMEA more cautious: 37% of EMEA consumers surveyed have not used their personal data in ways that help to curb the spread of the pandemic in the past six months - the highest of all the regions surveyed. Consumers in Asia-Pacific shared the most data overall: 24% say they informed their employer of their COVID-19 status and recent contacts in the past six months, for instance, compared with 20% in the Americas and 19% in EMEA.

This disparity goes beyond GDPR. There is a more individualist cultural attitude in EMEA and North America than in Asia-Pacific, which takes a more collectivist approach, says Saverice-Rohan. "Countries in Asia-Pacific have embraced the measures they feel are necessary and justified to save lives," she says. "Meanwhile the US is built on rugged individualism, and there's still the sense that these measures are not palatable and don't reconcile with American views."

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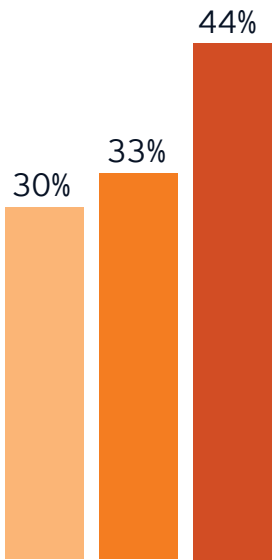
Reopening the economy and getting people back into the office, into stores and into schools will involve new collection of personal information. Individuals are more willing to accept this, because they recognize why they have to do it.

Angela Saverice-Rohan

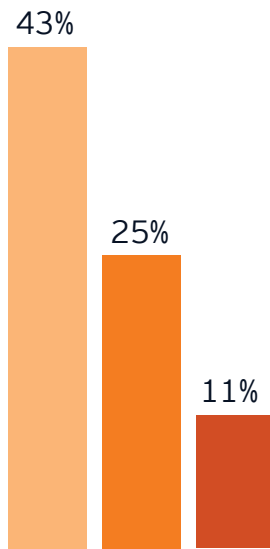
EY Americas Privacy Leader

Figure 11: Proportion of consumers that have done the following in the past six months due to the spread of COVID-19, analyzed by region

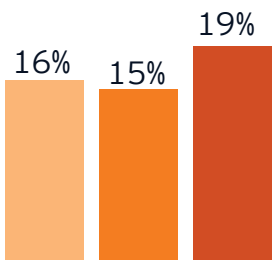
Asia-Pacific EMEIA Americas



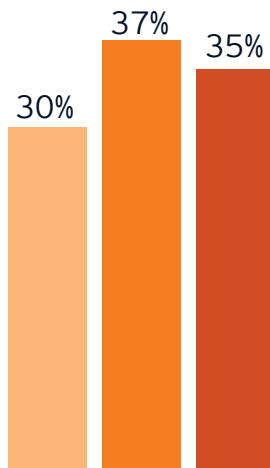
Informed their family and friends of their quarantine habits and recent contacts



Used a government-backed contact-tracing app



Informed their child's school of their family's quarantine habits



None of the above

The great data divide: Privacy, power and the political pendulum

In a pandemic, protecting public health depends on citizens trusting the government and its scientific advisers. But that trust can be heavily influenced by political partisanship, transparency and misinformation.

Our survey finds trust problems among US consumers in particular: 46% of all consumers say that the government should have more access to personal data in order to respond to critical crises, but that figure falls to 38% among US respondents - lower than every other region.

“There is still a high level of distrust in the relationship between the individual and the government,” says Saverice-Rohan. “In the US, some of that is based on a lack of transparency in the data. As we learn more about the virus, some of the reports from government agencies change, and that fuels mistrust, which affects how comfortable individuals feel about giving additional information to the government.”

In the US, this distrust is set against a backdrop of authorities using data against Black Lives Matter protesters.³ In Europe, meanwhile, there are concerns about the safety of private patient data.⁴

“There is concern in Europe about governments,” says Tony de Bos. “Although consumers trust their governments more than private companies, there is still a lot of concern about how they are going to use their data. Are they really using it for what they say? Are they going to do different things with it? Are they connecting the dots with other data they have?”

The politics of privacy

Consumer data privacy is an established partisan issue in the US. Our survey backs this up, uncovering a more guarded attitude toward data privacy from the country's right-leaning consumers than left-leaning consumers. More than a third (35%) on the center right say they have submitted a request to an organization to understand what data it holds or have that data deleted, compared with 22% on the center left. Those on the center right are also more likely (53%) to read about an organization's data use than those on the center left (47%).

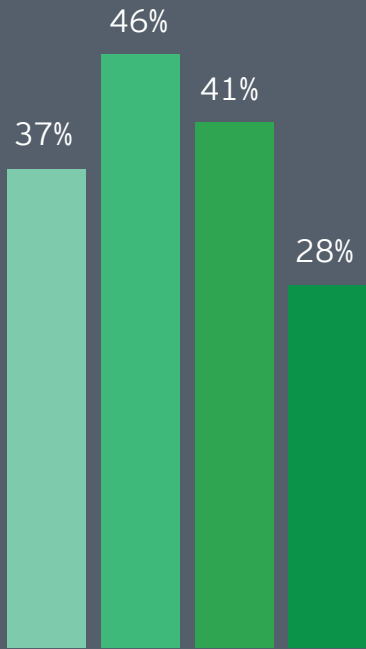
US consumers on the far right are three times more likely to have used a government-backed contact-tracing app than those on the far left (20% compared with 6%), and are more likely to have informed their employer of their COVID-19 status (20% compared with 18%). While those on the far left are more likely to have shared this information with their family and friends (37% compared with 28%).

³ <https://theconversation.com/police-surveillance-of-black-lives-matter-shows-the-danger-technology-poses-to-democracy-142194>

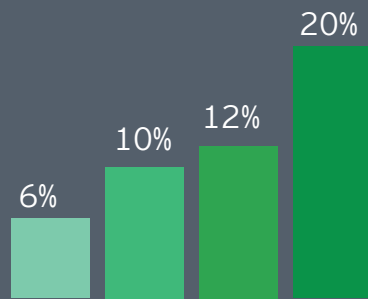
⁴ <https://diginomica.com/privacy-has-taken-back-seat-governments-pursue-digital-contact-tracing>

Figure 12: Proportion of US consumers that have done the following in the past six months due to the spread of COVID-19, analyzed by political view

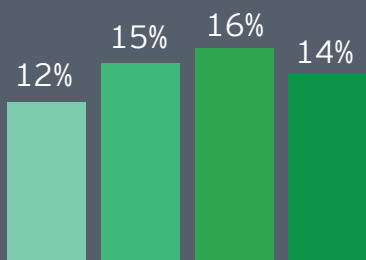
■ Far left ■ Center left ■ Center right ■ Far right



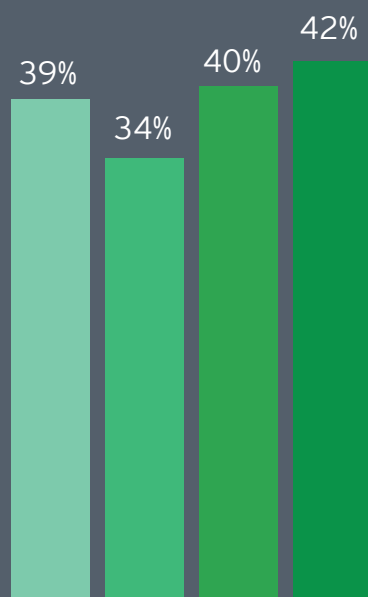
Informed their family and friends of their quarantine habits and recent contacts



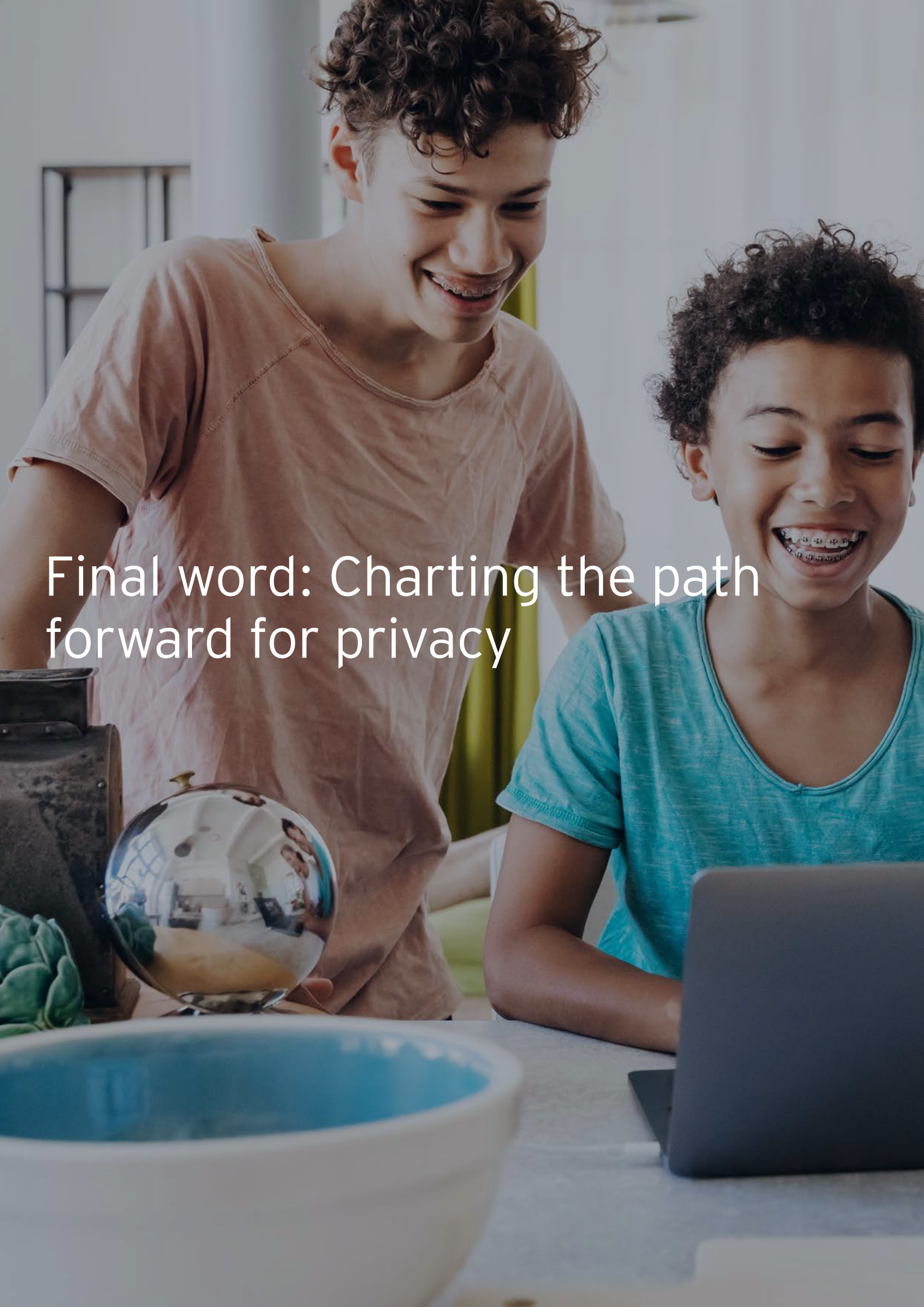
Used a government-backed contact-tracing app



Informed their child's school of their family's quarantine habits



None of the above

A young man with curly hair and a light-colored t-shirt is leaning over a table, smiling broadly. He is holding a small, reflective globe. A young woman with curly hair and a teal t-shirt is sitting at the table, looking at a laptop and smiling. The scene is set in a bright, modern interior with a window in the background. The text "Final word: Charting the path forward for privacy" is overlaid on the image in white, sans-serif font.

Final word: Charting the path forward for privacy



The COVID-19 pandemic has given way to a rise in altruistic data sharing, and control over data is inspiring consumer confidence. Now, organizations and their customers need to lead the way on data privacy.

A moment of reckoning for business

How can businesses make a start? De Bos urges firms to consider the impact of privacy on their day-to-day business. "Research it," he says. "Consider its importance to your business, and ensure you communicate what you are doing around data protection in a simple way to your clients, citizens or customers."

We have seen that consumers prize security and control, but many are also swayed by offers of something in return - either for themselves or, in this pandemic era, for society. But consumers are vigilant and varied. Some - younger people, for instance - are more likely to share their data, and many are more likely to trust one kind of organization over another. Against such a complex picture, how can organizations approach data privacy without alienating anyone?

Currencies of trust

Transparency is vitally important in a pandemic to help mitigate identification risks⁵ to individuals through data sharing, and a clear privacy policy and value exchange - the transaction of exchanging rich data for a perceived benefit - are equally crucial for businesses to demonstrate they can meet consumers' demands in this new privacy landscape.

"It's about both transparency and value exchange. That's how companies should look at this going forward," says de Bos. "'How transparent am I about the data I collect? What do I share back?' Consumers should be thinking, 'If I share my data with you, what do I get back? If I share more, do I get more back?' That's a concept that needs to be explained more simply by businesses."

⁵ <https://iapp.org/resources/article/white-paper-privacy-risks-to-individuals-in-the-wake-of-covid-19/>

Give back control

The research findings show that vigilance has remained strong through the pandemic, and as consumers increasingly self-educate and demand greater control over the data they share, an organization's privacy policy can become its competitive differentiator.

So companies can empower consumers by cutting out the jargon when they communicate about data protection and the value exchange. Start with simple questions about what you do with your data. "Those questions are in your record of processing activities," says de Bos. "What is the data you are going to collect? Why are you collecting it? Are you sharing it with somebody else? Simple questions with simple answers create much more transparency for consumers."

Inform customers but try not to overwhelm them. "Customers care most about privacy when it's violated," says Angela Saverice-Rohan. "Most of the studies still indicate that they will not read extensive disclosures. We need to give them meaningful information that allows them to take action - but we also need to demand a certain level of transparency from companies."

“

It's about both transparency and value exchange. That's how companies should look at this going forward: How transparent am I about the data I collect? What do I share back?

Tony de Bos

EY Global Data Protection & Privacy Consulting Leader



Purposeful companies, purposeful policies

“In order to tap into altruistic data-driven behavior,” says Saverice-Rohan, “Companies need to think about how they present themselves with respect to the good that they are doing in the world and the issues they are trying to tackle.”

The reputational rewards for brands that lead with purpose are well-established. And those rewards have never been greater - or more essential - than in the COVID-19 era. Many consumers want to help society and others by handing over their data; unlocking that data means striking the right balance between risk, reward, value, security and control, and it is organizations' privacy policies that are the key.



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In order to tap into altruistic data-driven behavior, companies need to think about how they present themselves with respect to the good that they are doing in the world and the issues they are trying to tackle.

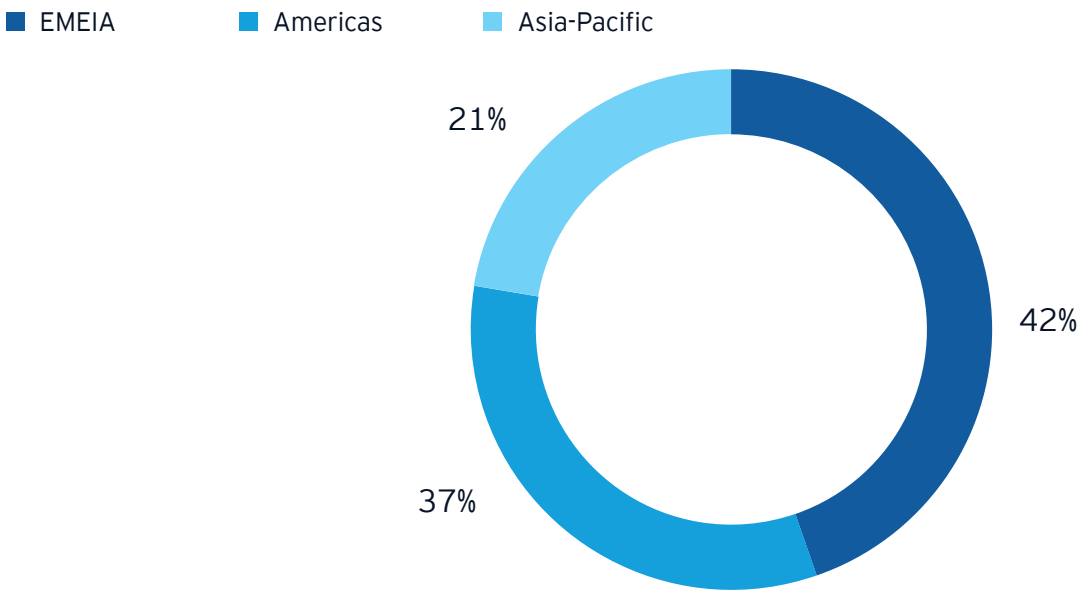
Angela Saverice-Rohan
EY Americas Privacy Leader



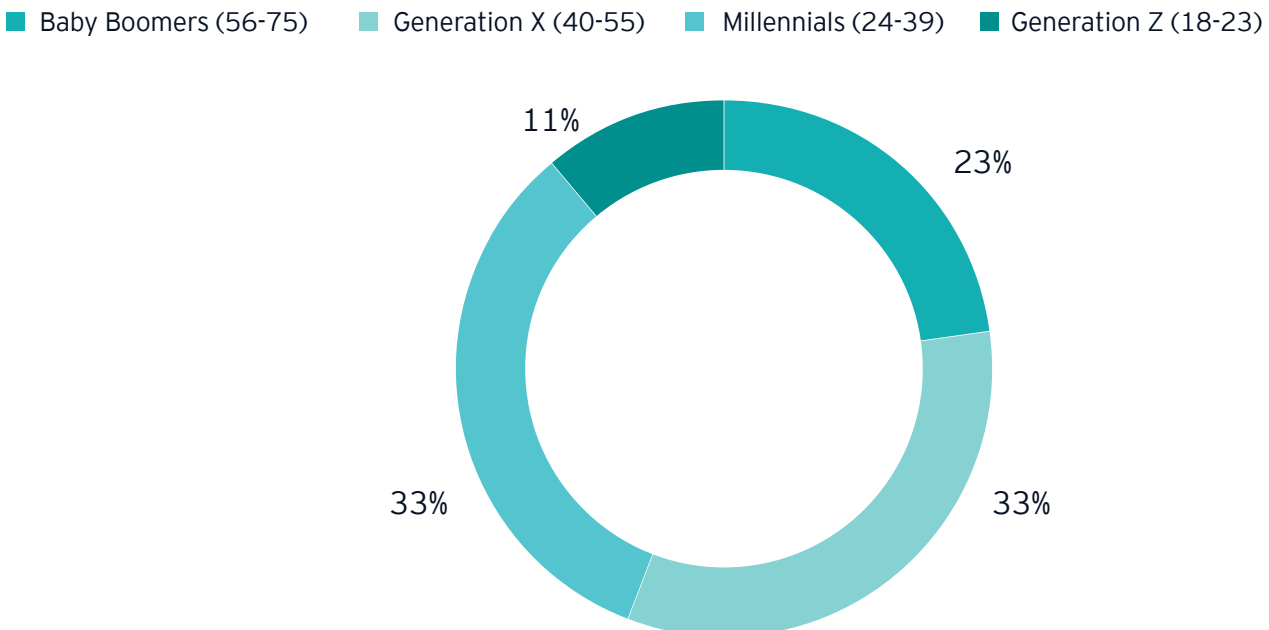
About the research

The data cited in this report is based on a global survey commissioned by EY and conducted by Longitude, a Financial Times company, in July and August 2020. The survey of 1,901 consumers in Asia-Pacific, Europe, the Middle East, India and Africa (EMEIA), and the Americas investigated attitudes and approaches to data privacy and data sharing, expectations of how organizations will use personal data, and how data privacy is adapting in the post-pandemic world. Respondents ranged in age from 18 to 75, spanning all household income levels in each.

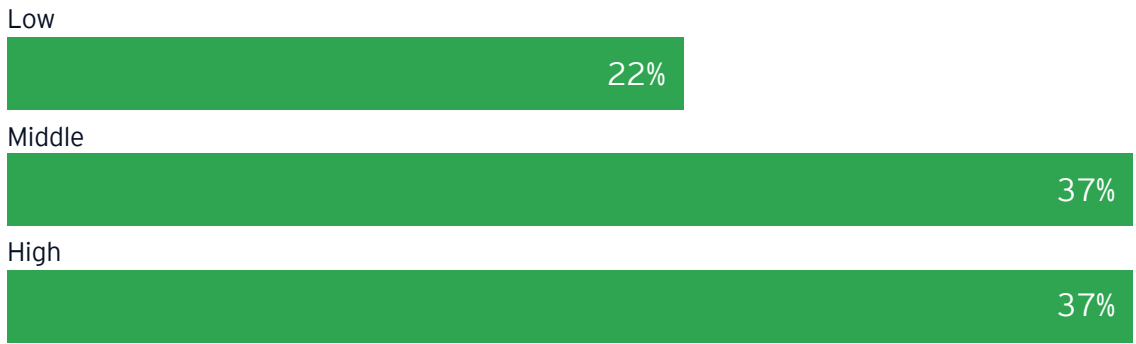
Survey respondents by region



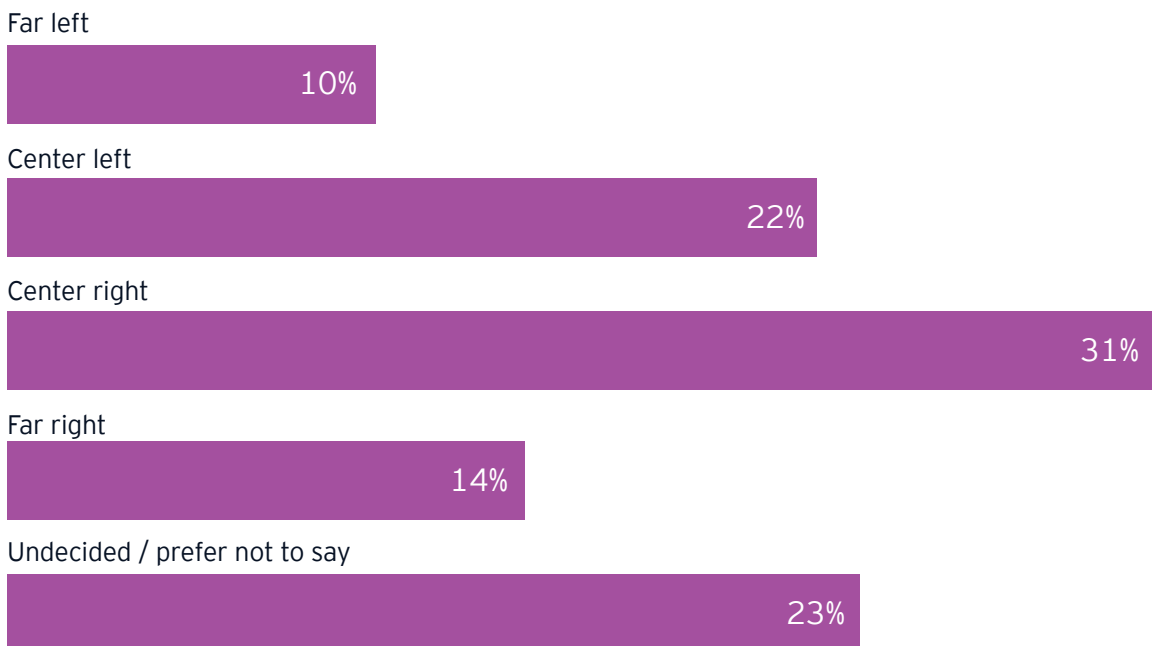
Survey respondents by generation



Survey respondents by household income



Survey respondents by political view (US respondents only)



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