



**BIG
BROTHER
WATCH**

UK Public Research – Online Privacy

Big Brother Watch



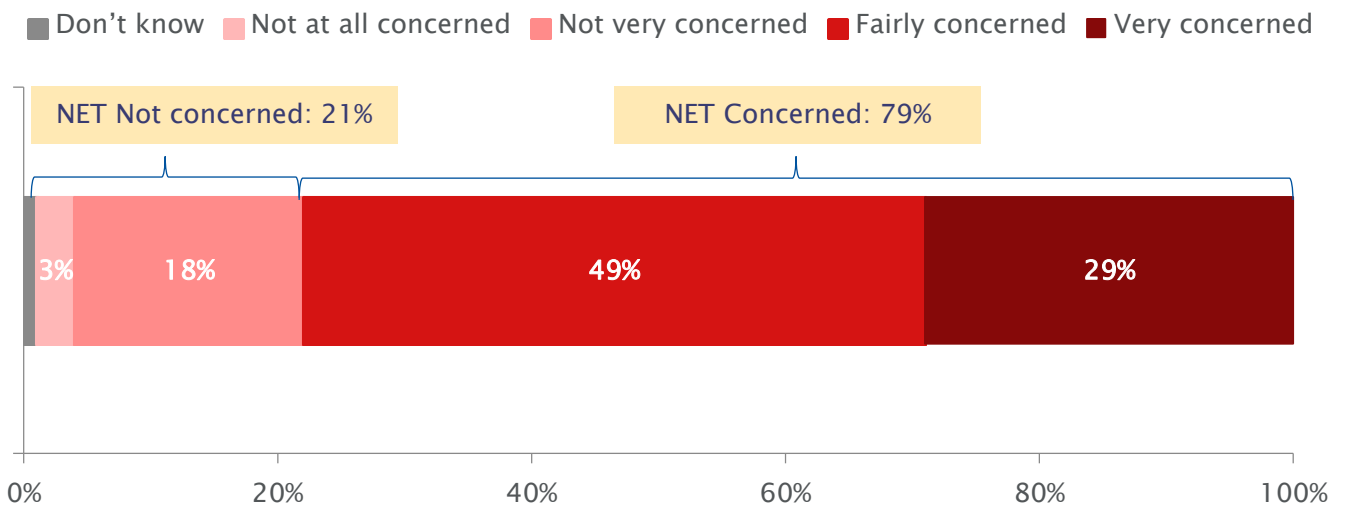
CONCERNS ABOUT ONLINE PRIVACY

Public concerns over personal online privacy

Four in five adults in the UK are concerned about their privacy online (79%), with younger people slightly more likely to have concerns than older members of the public. More than four in five 18–34 year olds are concerned about their privacy online (83%), compared to three quarters (76%) of those aged 55+. Just one in five adults say they are not concerned about their privacy online (21%), with only 3% saying they have no concerns at all.

Q: How concerned, if at all, are you about your privacy online?

Showing % concerned about personal privacy online



Base: All adults (n=1000)

A large majority of adults who say that consumer experiences are being enhanced by big companies gathering large amounts of their personal data for internal use are concerned about their privacy online (77%). 90% who feel that consumers are being harmed are also concerned – this shows that there is widespread concern among adults over their privacy online, despite varying attitudes towards the effects on the consumer.

Views on the impact of gathering personal data on the customer experience

Q: Which of the following statements comes closest to your view?



Public view	%
Consumers are being harmed by big companies gathering large amounts of their personal data for internal use	46%
Consumer experiences are being enhanced by big companies gathering large amounts of their personal data for internal use	19%
Neither	21%
Don't know	14%

Base: All adults (n=1000)

Almost half of all adults in the UK feel that consumers are being harmed by big companies gathering large amounts of their personal data for internal use (46%). On the other hand, one in five feel that consumer experiences are being enhanced (19%).

Younger people (18–34 year olds) are more than twice as likely to feel that their online consumer experiences are being enhanced than those aged 55+ (26% and 12% respectively). Therefore, although younger people are more likely to have concerns about their privacy online, they are also marginally more amenable to the practice, and understand how such data can improve the consumer experience. This could be explained in part by younger adults' greater use of social media outlets, like Facebook, Twitter and Snapchat in terms of privacy, as well as their greater use of retail stores and other websites that require registration of their details.

A sizeable minority of adults are indifferent or unsure of the impact on their consumer experience by big companies gathering their personal data; a fifth (21%) select "neither" when asked, and 14% say they don't know.

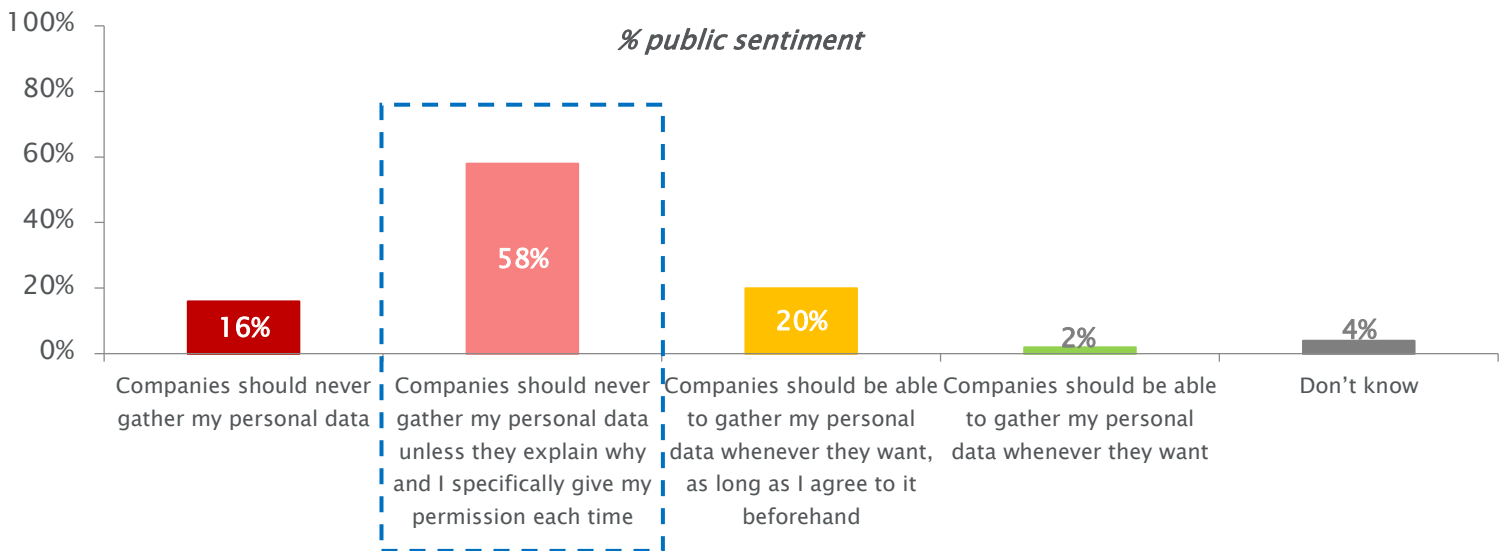
CONTROL AND USE OF PERSONAL DATA

Personal control over data

When prompted, around three quarters (74%) of adults say they would like to have a high level of control of their data (either saying companies should never gather their data, or should explain why and ask for permission each time). Almost three in five say that companies should never gather their personal data unless they explain why and were specifically given permission each time (58%). One in six (16%) say that companies should never gather their personal data.

As expected, those who feel that consumers are being harmed by companies gathering their data are far more likely to want higher control than those who feel that consumer experiences are being enhanced by this practice (86% against 57%). Women are more likely to prefer having a high control over their personal data than men (78% and 69% respectively).

Q: When online, how much control would you like to have over your personal data (e.g. the websites you visit or products you look at)?



Base: All adults (n=1000)

Four in five adults (80%) say that companies should be able to gather their personal data in some form or another – a similar figure to the proportion who say they are concerned about their privacy online (79%). As such, we can assume that although the public are concerned about their privacy in principle, there is a certain level of



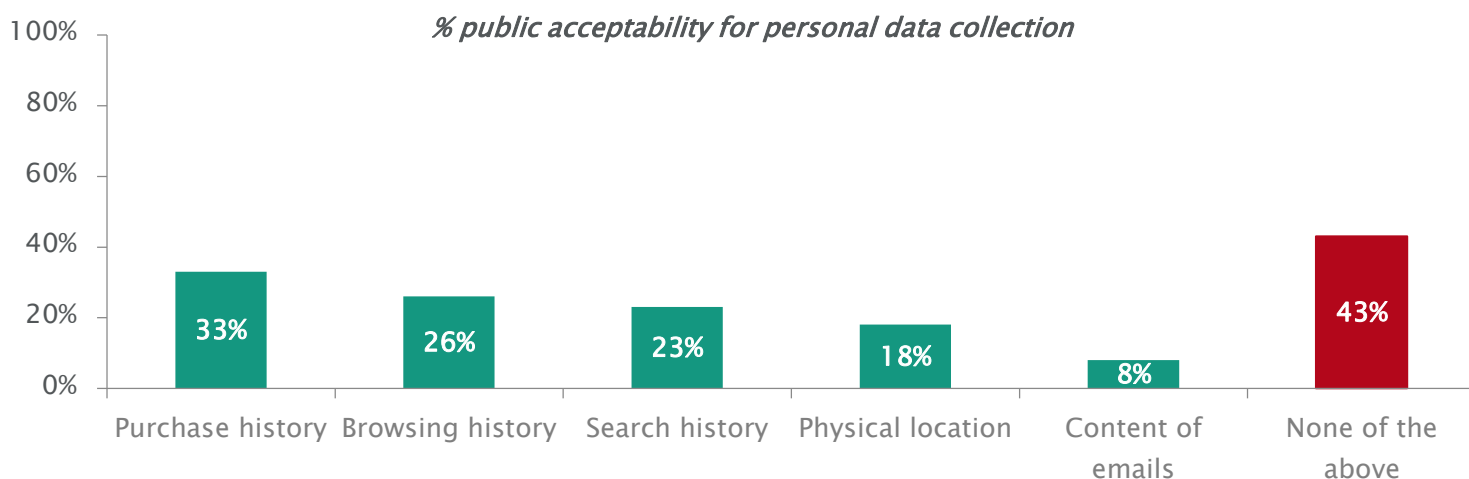
acceptance that companies can gather personal data, should they receive permission. The types of personal data deemed acceptable to gather is explored below.

Perceptions on how companies collect and use personal data

Adults in the UK are more likely to say that it is not acceptable for websites and organisations to collect any form of personal data presented, with more than two in five selecting this option (43%).

Half of those who feel that consumers are being harmed by big companies collecting large amounts of their personal data select 'none of the above' when asked what data is acceptable for organisations to collect (53%). Just 16% of those who feel that consumer experiences are being enhanced select this.

Q: When people are using the internet, their online personal data (e.g. websites visited, products looked at or emails sent) is often gathered by websites and organisations (e.g. the company that runs an internet browser or email system). Which of the following types of personal data, if any, do you think it is acceptable to be collected by websites or organisations?



Base: All adults (n=1000)

Women are more likely than men to say that it is unacceptable for websites and organisations to collect any type of personal data (48% and 37% respectively). The same applies to the 'baby-boomers' compared to younger generations – half (50%)



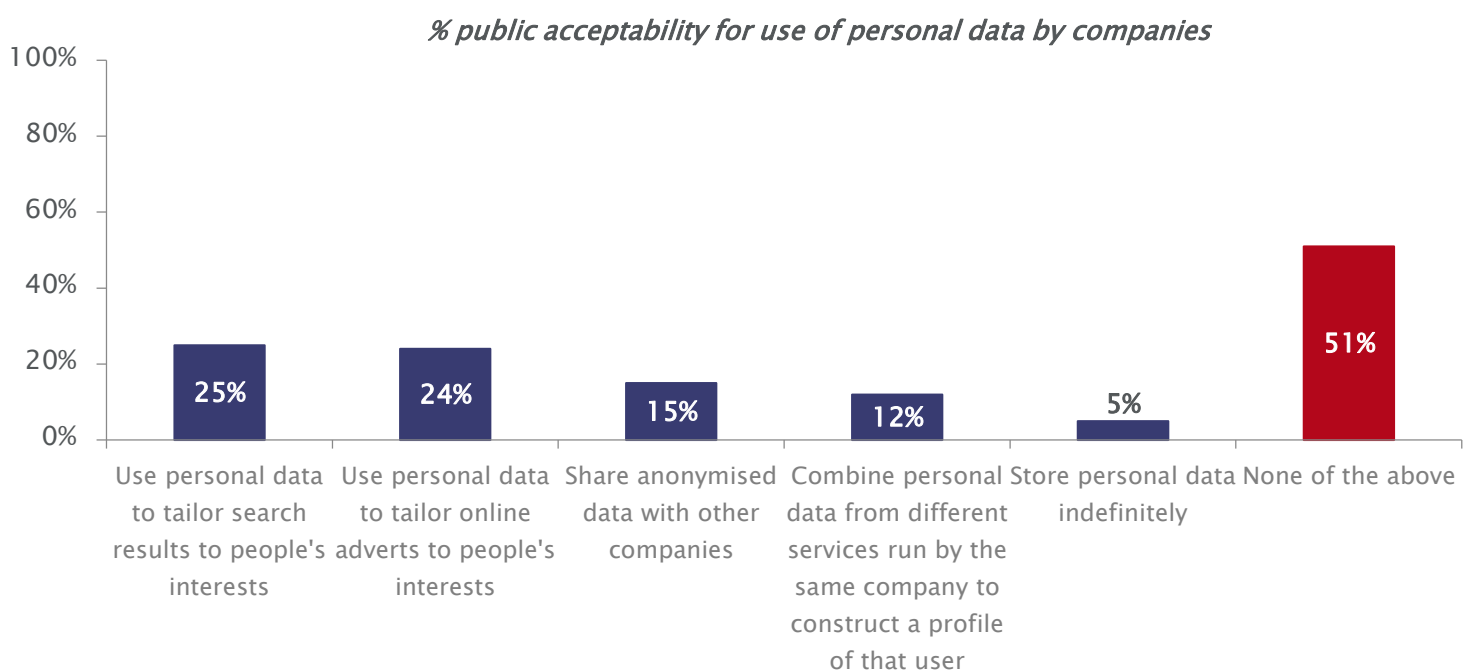
of those aged over 55 say 'none of the above', compared to a third (32%) of 18–34 year olds.

Of the types of personal data presented, purchase history (i.e. things bought online) is seen as the most acceptable to collect for UK adults (acceptable to 33%). This is followed by browsing history (26%) and search history (23%). Less than one in ten say that collecting the content of emails is acceptable (8%).

Younger people are more likely to say it is acceptable for websites and organisations to collect any type of personal data compared to elder adults. As expected, those who feel that consumer experiences are being enhanced by big companies collecting personal data are more likely to be accepting of personal data collection, compared to those who feel that consumers are being harmed.

Adults in the UK feel similarly about how companies use personal data – half say that none of the options presented are acceptable for companies to use personal data (51%).

Q: Which of the following, if any, do you think it is acceptable for a company to do with online personal data (e.g. websites visited, products looked at, or emails sent)?





Base: All adults (n=1000)

A quarter of all adults in the UK say that it is acceptable for companies to use personal data to tailor search results to people's interests (25%), and a similar proportion say the same for tailoring online adverts (24%). A smaller proportion say it is acceptable for companies to share data with peer organisations (15%), or combine personal data to construct a profile of the user (12%).

Males are marginally more open to companies using their data for various purposes than females, and are less likely to select 'none of the above' (45% and 56% respectively) – the same applies for younger adults.

REGULATION OF GOOGLE

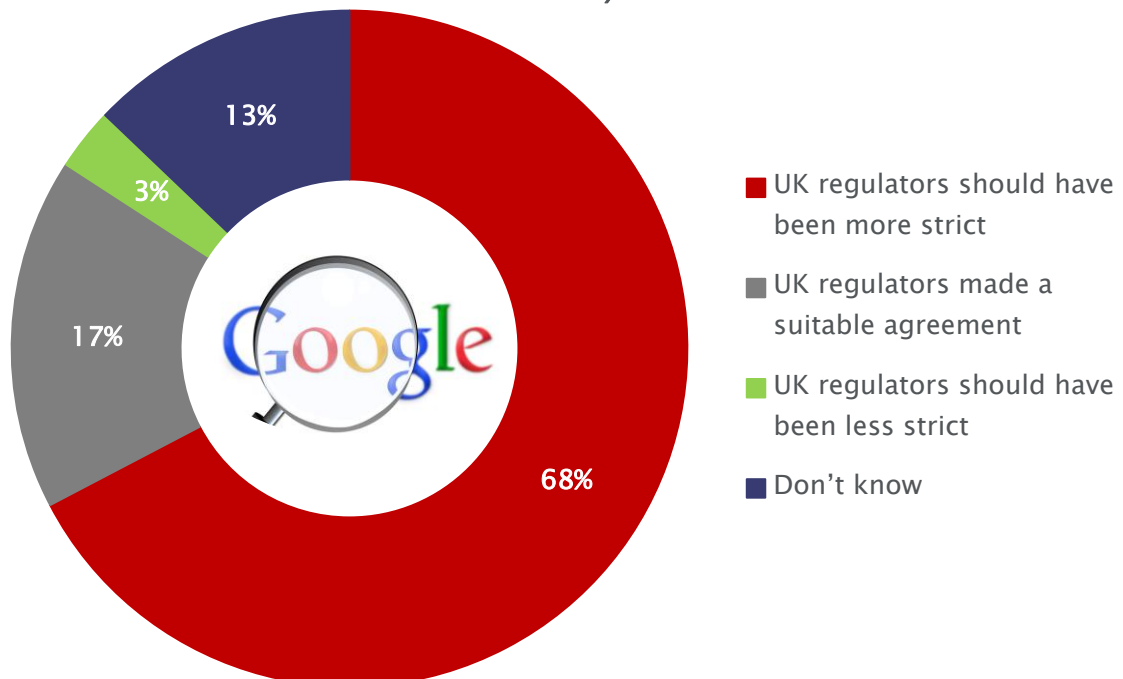
Perceptions of Google's privacy policy agreement

On the whole, adults in the UK feel that UK regulators should have been stricter in their agreement with Google on their privacy policy; two thirds agree with this viewpoint (68%).

Q: After investigating Google's Privacy Policy in 2012, data protection authorities reported that Google's Privacy Policy did not comply with European data protection laws, stating "The Privacy Policy allows Google to combine almost any data from any services for any purposes". In January 2015, Google agreed with UK regulators to make the wording of its privacy policy clearer, but not change how it uses consumers' data.

Which of the following statements, if any, comes closest to your view about the agreement on Google's Privacy Policy?

Perceptions of UK regulators agreement with Google on their Privacy Policy



Base: All adults (n=1000)



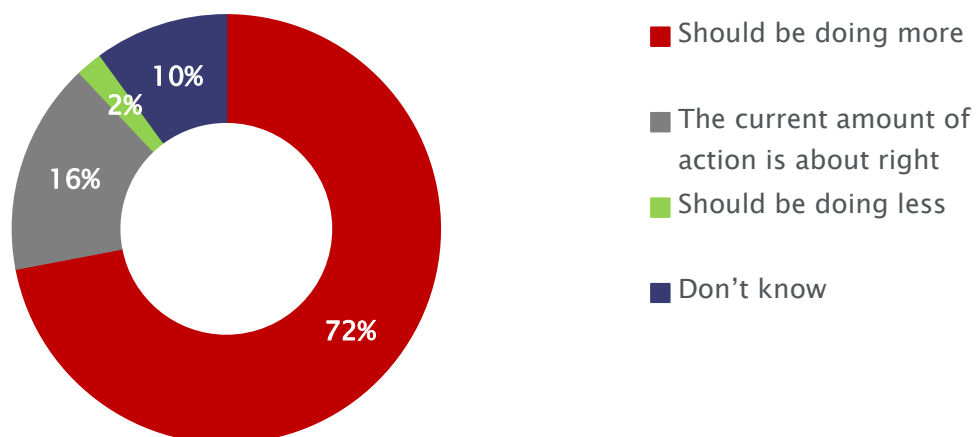
A majority of adults who are both concerned and unconcerned about their personal online privacy say that the UK regulator should have been stricter in their agreement with Google (71% concerned, 57% not concerned). Although many adults listed themselves as ‘not concerned’ about their privacy online, in practice the majority feel that regulators should crack down further on Google’s Privacy Policy. This is consistent across age and gender.

Less than a fifth of adults (17%) say that UK regulators made a suitable agreement with Google on their Privacy Policy. As indicated above, younger adults are more amenable towards the agreement made with Google; almost a quarter say that the regulators made a suitable agreement (23%*), compared to just over one in ten (11%*) of adults aged 55+. Elder members of the public are also far more likely to say that regulators should have been stricter than their younger counterparts (79% aged 55+ say the agreement should have been stricter, compared to 55% of 18–34 year olds).

Looking forward, the vast majority of adults in the UK feel that regulators should be doing more to force Google to comply with existing European Directives on privacy and protection of personal data (72%). Broad support is consistent across age, gender and concern over personal privacy online.

Q: And do you think that national regulators should be doing more or less to force Google to comply with existing European Directives on privacy and protection of personal data?

Perceptions of future action national regulators should take to force Google to comply with privacy rules



Base: All adults (n=1000)



Following Google's recent decision to merge its European businesses, the debate surrounding how the company works with national regulators on EU directives will gather pace.