

PUBLIC PERSPECTIVES



**Do Canadians Know What is Happening with Their
Personal Online Information and Who Do They Trust?**

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ABOUT NAVIGATING CHANGE AND THIS REPORT



Rapid and continuous transformation, due to technological and social phenomena has become the norm.

How can organizations thrive in the social and economic transformation (SET) era, where change is the new normal?

Three key pillars are critical in the SET era:

1. Understanding **the context in which you are operating today;**
2. understanding **the public's future hopes and expectations** and,
3. having **the trust of your stakeholders.**

Ipsos is constantly monitoring the Canadian environment and examining...

- [CanadianContext](#) (quarterly consumer confidence, quality of life, Ipsos Disruption Barometer, etc.)
- [CanadaNext](#) (annual receptivity to and expectations for future technology, social change, etc.)
- [CanadianReputation](#) (annual trust and reputation in sectors and companies)

This report is related to [CanadaNext](#), and draws on an extensive international study that Ipsos conducted in partnership with the World Economic Forum.

KEY FINDINGS OF THIS REPORT: IGNORANCE, DISTRUST AND A CALL FOR TRANSPARENCY

Citizens are in the dark about how their personal information is used, particularly in economically advanced countries

- Most adults surveyed around the world proffer knowing little or nothing about how much personal data companies and governments hold, and how they use it
 - Knowledge is generally lower in countries where personal data is more regulated

Trust is lacking, especially toward media companies and foreign governments

- In most countries, citizens tend not to trust companies and governments to use the information they have about them “in the right way”
 - Trust is lowest for foreign governments, media companies, and search and social media sites
 - Trust is notably higher for healthcare providers and financial services companies

Consumers value privacy and compensation more than see benefits to sharing personal data

- Globally, most consumers agree that allowing companies to use personal data is something they should be able to refuse (and that they should be paid or rewarded for it)
 - Only about half as many agree it helps consumers save time or save money

Transparency and assurances of confidentiality and security can best allay concerns around usage of personal data

- Consumers are especially likely to say that they would be more comfortable sharing personal information with a company if it is clear about how it will use the data, promises it won't share the data with third parties, or has never experienced security breaches
 - But many also say that their comfort could increase if they have past experience with the company or are offered some financial compensation.

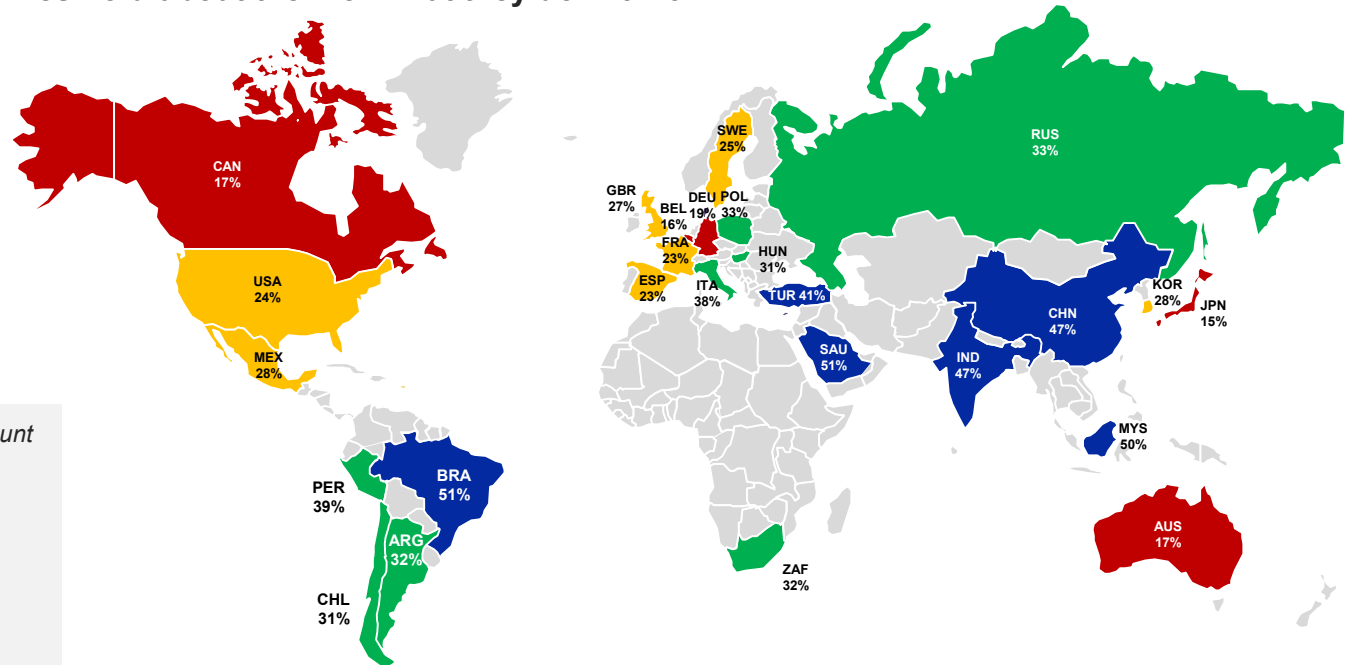
KNOWLEDGE OF COMPANY USE OF PERSONAL INFORMATION – OVERALL AVERAGE

High-income country citizens, including Canada, are least likely to say they know what data companies hold about them or what they do with it

GLOBAL
AVERAGE
31%



% know a great deal or fair amount
(average for all six statements)

- 40% or more
- 30-39%
- 20-29%
- Less than 20%



KNOWLEDGE OF COMPANY USE OF PERSONAL INFORMATION – SPECIFIC ITEMS

Canadians are woefully ill-informed about how companies can and do use their personal information.

<i>Generally speaking, how much do you know about each of the following...? (% A great deal or a fair amount)</i>		vs. Global Avg	vs. USA
How much data companies hold about you	 20%	-15%	-7%
Your rights over the way companies handle your personal information	 19%	-14%	-5%
What companies do with the data they hold about you	 19%	-13%	-8%
How you can access, change or delete the data companies hold about you	 16%	-12%	-6%
How long companies can keep data they hold on you	 14%	-16%	-7%
With whom companies share the data they hold about you or sell it to	 14%	-14%	-8%

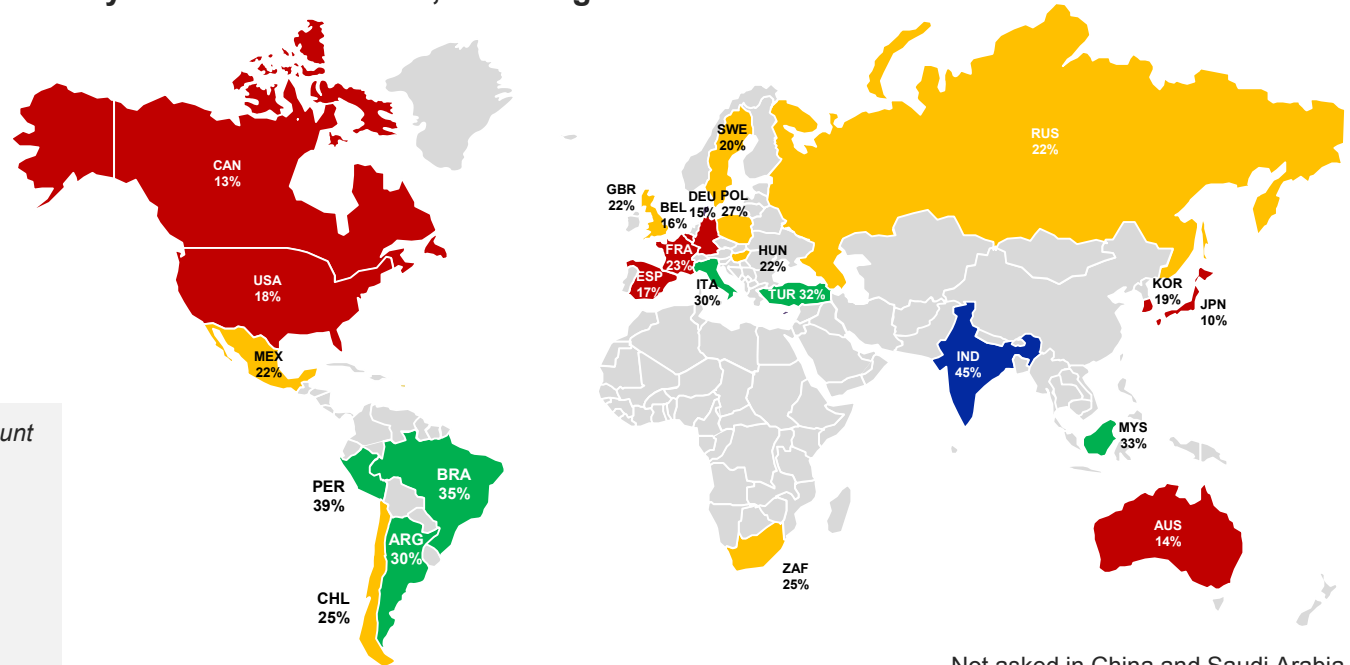
KNOWLEDGE OF GOVERNMENT/AUTHORITIES ACCESS TO & USE OF PERSONAL INFORMATION – OVERALL AVERAGE

Knowledge about authorities' access to and usage of personal data is especially low in economically advanced countries, including Canada

GLOBAL
AVERAGE
23%

% know a great deal or fair amount
(average for all six statements)

- 40% or more
- 30-39%
- 20-29%
- Less than 20%



Not asked in China and Saudi Arabia

KNOWLEDGE OF GOVERNMENT/AUTHORITIES USE OF PERSONAL INFORMATION – SPECIFIC ITEMS

Canadians are even less informed about how authorities/government can and do use their personal information than they are about companies.

<i>Generally speaking, how much do you know about each of the following...? (% A great deal or a fair amount)</i>		vs. Global Avg	vs. USA
How much data national and local authorities hold about you	15%	-12%	-6%
Your rights over the way national and regional authorities handle your personal information	15%	-9%	-2%
What national and regional authorities do with the data they hold about you	15%	-8%	-3%
How long national and regional authorities can keep data they hold on you	13%	-11%	-8%
With whom national and regional authorities share the data they hold about you or sell it to	12%	-9%	-4%
How you can access, change or delete the data national and regional authorities hold about you	11%	-10%	-6%

SELECT KNOWLEDGE ITEMS BY REGION, SEX AND AGE

While there are some relative differences (e.g., men higher than women, Millennials higher than Gen X and Boomers), lack of awareness is widespread across all demographic groups in Canada.

	% know a great deal or a fair amount										
	BC	Alta	Prairies	Ont	Que	Atl	Men	Women	Millennial	Gen X	Boomer
How much data companies hold about you	19%	18%	21%	21%	19%	22%	26%	15%	29%	18%	14%
What companies do with the data they hold about you	19%	11%	19%	21%	20%	19%	27%	12%	24%	21%	13%
How much data national and regional authorities hold about you	12%	23%	7%	14%	14%	16%	18%	11%	22%	12%	9%
What national and regional authorities do with the data they hold about you	12%	23%	11%	15%	14%	14%	19%	11%	22%	13%	9%

ATTITUDES TOWARD COMPANY USE OF PERSONAL INFORMATION

Canadians clearly believe that they should be able to refuse companies using their personal information and that they should be compensated.

<i>To what extent do you agree or disagree that allowing companies to use data they collect about you... (% Strongly or somewhat agree)</i>		vs. Global Avg	vs. USA
Is something consumers should be able to refuse	79%	+17%	+4%
Is something consumers should be paid or rewarded for	63%	+9%	+2%
Helps you find/discover products, services and information that are relevant to you	44%	+3%	0%
Help them provide you with products, services and information that better meets your needs	41%	0%	-3%
Helps you save time	35%	0%	+1%
Helps you save money	26%	-2%	-2%
Doesn't really bother you	21%	-2%	-2%

MOTIVATORS FOR GIVING PERMISSION TO ACCESS PERSONAL INFORMATION

Transparency tops the list of motivators for people to let companies or government use their information.

<i>For which of the following reasons would you be most willing to give a company or government organization access to your personal information/data?</i>		vs. Global Avg	vs. USA
If I am informed clearly about the particular risks I'm exposed to	50%	+1%	+7%
If the services or products exactly meet my needs	32%	-10%	+4%
If it allows particular aspects of my personal situation and needs to be acknowledged and taken into account	26%	-4%	+4%
If it allows me to navigate its website/app faster in the future	17%	-4%	0%
If it allows the people I am dealing with to know me better	8%	-5%	-2%
Don't know/none of these	34%	+6%	-5%

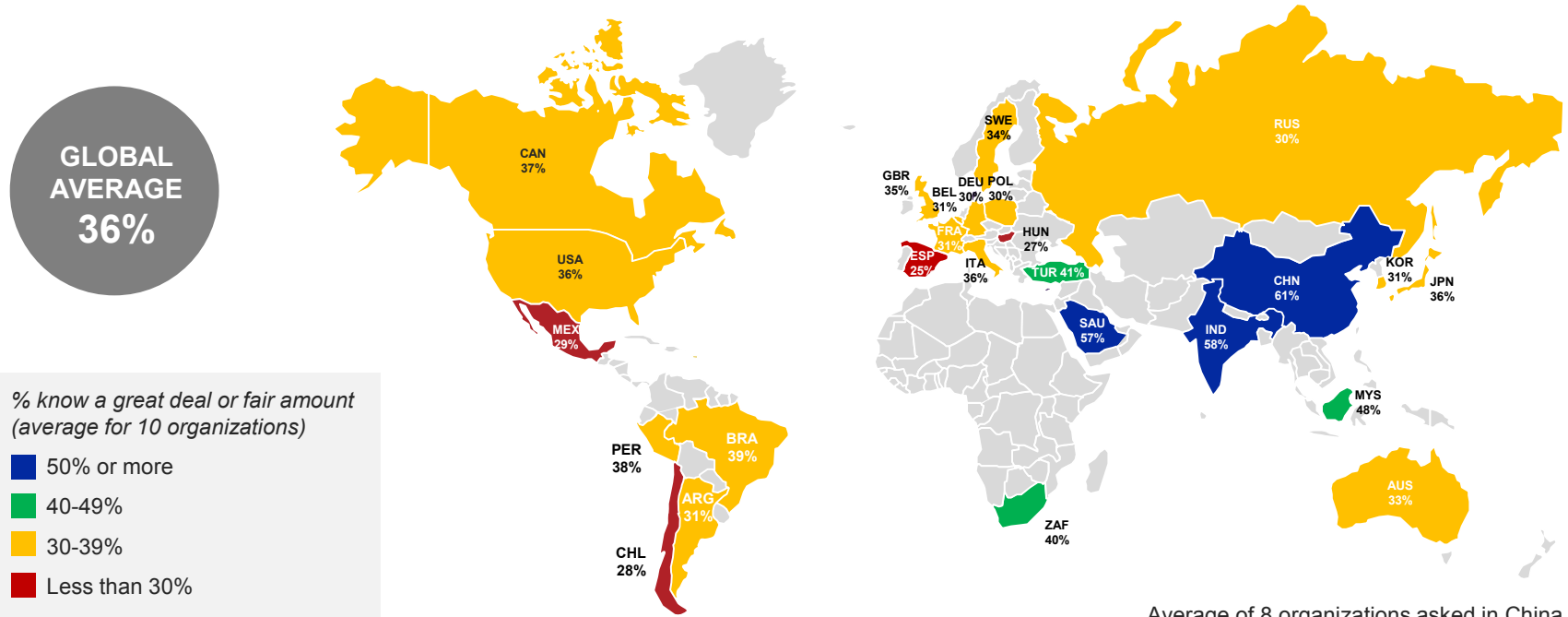
MOTIVATORS FOR GIVING PERMISSION FOR COMPANIES OR BRANDS TO ACCESS PERSONAL INFORMATION

Transparency is also key in increasing comfort sharing personal information with companies.

<i>To what extent would you be more comfortable about sharing your personal information with companies or brands that...(% much or somewhat more comfortable)</i>		vs. Global Avg	vs. USA
Are clear about what they will do with that information	75%	+8%	+6%
Promise not to share or sell with other parties	70%	+6%	+4%
Offer you some kind of compensation for your information (e.g., discount, reward, etc.)	67%	+7%	+1%
You have a lot of experience with	65%	+4%	+2%
Have never been subject to any breach, leak or fraudulent usage of data	65%	+3%	+6%

TRUST IN ORGANIZATIONS FOR USE OF PERSONAL INFORMATION – OVERALL AVERAGE











Mexico, Chile and Spain are least likely to trust organizations with their personal information



Average of 8 organizations asked in China
Average of 7 organizations asked in Saudi Arabia

TRUST IN SECTORS TO USE PERSONAL INFORMATION – SPECIFIC ITEMS

All sectors, except perhaps healthcare, have challenges among many Canadians in terms of the trust they engender to use personal information the “right way.” Canadians are much more trusting than the worldwide average that healthcare providers, financial service companies, regional authorities and the national government use their personal information the “right way.” They are somewhat less trusting of telecom companies and retailers, and significantly less trusting of search/social media companies, media companies and foreign governments.

<i>To what extent, if at all, do you personally trust the following to use the information they have about you in the right way? (% A great deal or a fair amount)</i>		vs. Global Avg	vs. USA
Healthcare providers	 74%	+15%	+14%
Financial service companies (banks, insurance)	 57%	+10%	+5%
Local/regional authorities	 49%	+9%	+9%
National government	 47%	+8%	+13%
Shipping/delivery companies	 45%	+4%	-2%
Telecom companies	 28%	-6%	-3%
Retailers	 28%	-4%	-8%
Search/social media sites	 17%	-11%	-6%
Media companies	 16%	-8%	-7%
Foreign governments	 10%	-10%	-6%

METHODOLOGY

- These are the findings of an [Ipsos Global Advisor survey on attitudes toward data privacy in partnership with the World Economic Forum](#). In total, 18,813 interviews were conducted October 26 – November 9, 2018 among adults aged 18-64 in the US and Canada, and adults aged 16-64 in all other countries.
- The survey was conducted in 26 countries around the world via the Ipsos Online Panel system. The countries reporting herein are Argentina, Australia, Belgium, Brazil, Canada, Chile, China, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Saudi Arabia, South Africa, South Korea, Russia, Spain, Sweden, Turkey and the United States of America. Note that some of the questions were not asked in all 26 countries.
- Between 500 and 1000+ individuals participated on a country by country basis via the Ipsos Online Panel. The sample size is 1000+ in Australia, Brazil, Canada, France, Germany, Great Britain, Italy, Japan, Spain and the United States of America. In all other countries the sample size is 500+. The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 5.0 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website.
- In countries where internet penetration is approximately 60% or higher the data output generally reflects the overall population. Of the 26 countries surveyed online, 16 yield results that are balanced to reflect the general population: Argentina, Australia, Belgium, Canada, France, Germany, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden, Great Britain and the United States. The 9 remaining countries surveyed – Brazil, Chile, China, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa and Turkey - have lower levels of internet connectivity and reflect online populations that tend to be more urban and have higher education/income than the general population.
- Where results do not sum to 100, this may be due to computer rounding, multiple responses or the exclusion of don't knows or not stated responses.
- Data are weighted to match the profile of the population.

CONTACTS

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Mike Colledge

President, Canadian Public Affairs

mike.colledge@ipsos.com



Chris Martyn

Chief Research Officer, Ipsos Public Affairs

chris.martyn@ipsos.com



Sean Simpson

Vice President, Canadian Public Affairs

sean.simpson@ipsos.com