

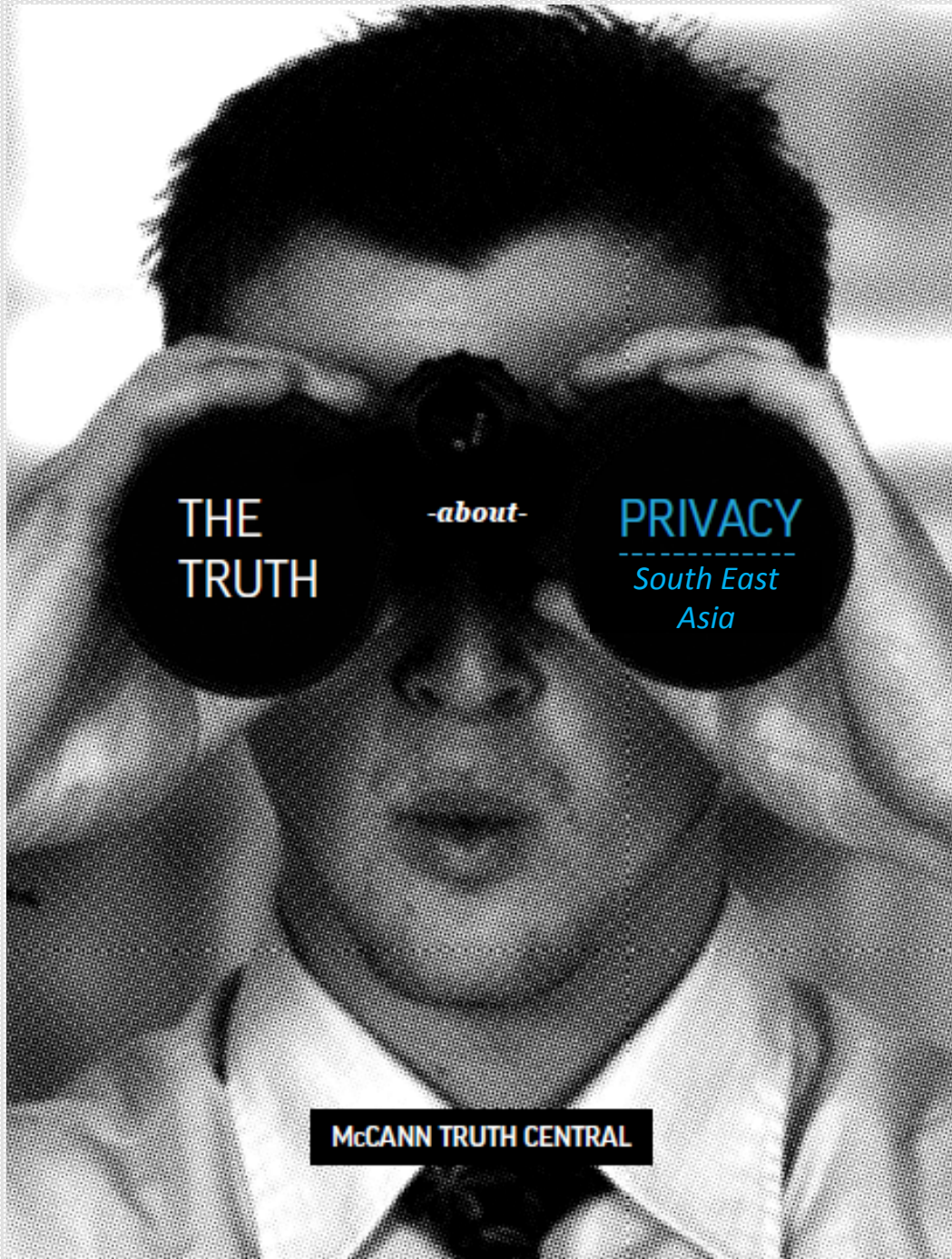
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Uncovering The World's Untold Truths

- *Truth Central is McCann's global thought leadership unity*
- *Uncovering consumer truths to shape and grow brands*
- *Generated every 3 months; 20 markets covered for a globalized view*
- *Customization for Client's businesses*
- *Thought piece to be shared with larger marketing community*



THE
TRUTH

-about-

PRIVACY

*South East
Asia*

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The Context of Privacy

As technology makes our world more transparent, handling customer data is both a risk and an opportunity for businesses.

While the foremost concern must be to protect the data and privacy of customers, a smart data strategy also encourages responsible sharing of relevant data, benefiting both the brand and the consumer.

Five markets from our region were included in the global study



Quantitative research conducted in US, UK, Hong Kong, Japan, India and Chile amongst 6,525 persons.

Qualitative research conducted in US, UK, **Hong Kong**, Japan, India, Chile, **Thailand, Malaysia, Singapore, Indonesia**, Australia, Belgium and Italy

Privacy questions that we sought answers for?

1. How do you know if you are being both safe and smart with customer data?
2. What is the truth about privacy concerns online?
3. What kinds of data are we most concerned about?
4. What does privacy actually mean to the average person around the world?
5. How can businesses cultivate responsible sharing with their consumers and within their category?



Key discoveries on Truth About Privacy



BRAVE NEW WORLD OF SHARING

THE RISE OF SAVVY SHOPPER

THE PRIVACY EQUATION

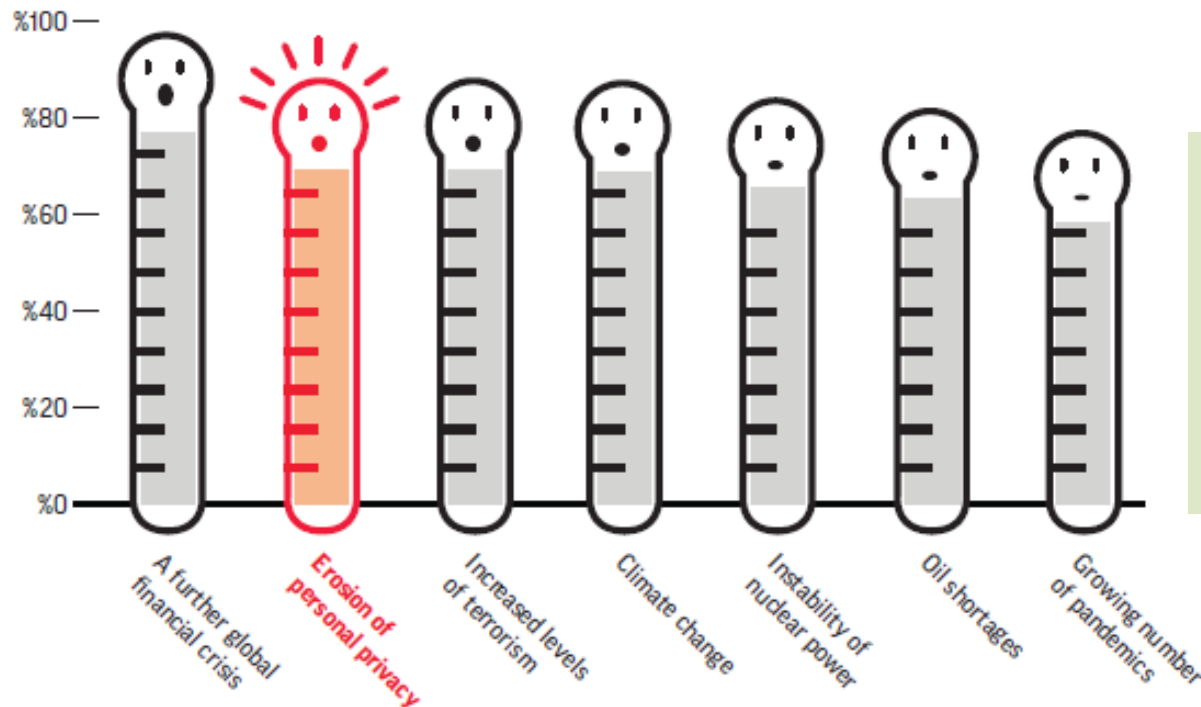
ADVICE FOR BRANDS: THINK LIKE A BANK



**BRAVE NEW WORLD OF
SHARING**

Consumers across markets are thinking about the changing nature of personal privacy

Indeed, it is the second most worrying issue among seven global concerns



The rise of social media has fundamentally altered the nature of what's private or public. 75% agreed that "people share far too much personal information online these days."

Four forces are shaping the new privacy norms




Technology's
Ascendance



Omnipresent
Celebrities



The end of
embarrassment



Role of social
networking in
civic life



Technology's
Ascendance

- Technology has created a more fluid and borderless world.
- When asked for their spontaneous associations with the word 'privacy' in our groups, the first words that came to mind for our respondents were all related to technology.
- *"You put your info in a little lake, and then it goes into a river and then it goes into the ocean."*
- This borderless world makes it harder to give consumers a sense of control over their own data.




**Omnipresent
Celebrities**

- Celebrities have raised the bar for what is and isn't acceptable to share in public.
- They capitalized on the social media trends, sharing their lives more than ever before with their fans.
- Now anyone can become a celebrity if they just tweet enough!

A woman with dark hair, wearing a red dress, is shown from the chest up. She is holding a cell phone to her ear with her right hand and looking slightly to the left. The background is a blurred indoor setting with a window and some furniture. A purple circle is overlaid on the left side of the image, containing the text 'The end of embarrassment'.

The end of
embarrassment

- With so much being shared, it's much harder to actually be embarrassed about something these days
- *"Everything is hanging out... so why should I be embarrassed about, you know, anything?"*
- Many of us here must have overheard (or had) a private conversation in public on a cell phone



Role of social
networking in
civic life

- Social networks have become the new place to gossip, to have a rant, and to get important news about your friends, family and community
- Most consumers feel that it has brought them closer to friends and family who live far away
- And many feel, including older consumers, it has brought a renewed sense of connection with civic life

These factors ensure that there is no clear separation between public and private

Snooping has become common

“As HR professional, it is part of my job to get as much information about the candidate as possible... I regularly check on social media activities of potential candidates”
Malaysia

“When I have to meet a new person I check about his background through LinkedIn and Facebook”
Singapore

In a world where more and more people are searching for information online, people are devoting more time to manage their online brand (or multiple online brands)

Multiple identities: ‘virtuous me’ that is suitable for family and employers; ‘popular me’ which we must project to friends and social acquaintances and even ‘anonymous’ to protect against snooping!!!

As online identity and privacy becomes a more complex business and at the same time more brands seek to interact with their customers online, it begs an important question:
Which version of your customer are you interacting with today?



**THE RISE OF SAVVY
SHOPPER**

Hot Savings
and Specials

Click
Here

Privacy worries consumers, but some aspects of privacy are far more worrisome than others

Consumers have two prime concerns about privacy:

Security of their finances

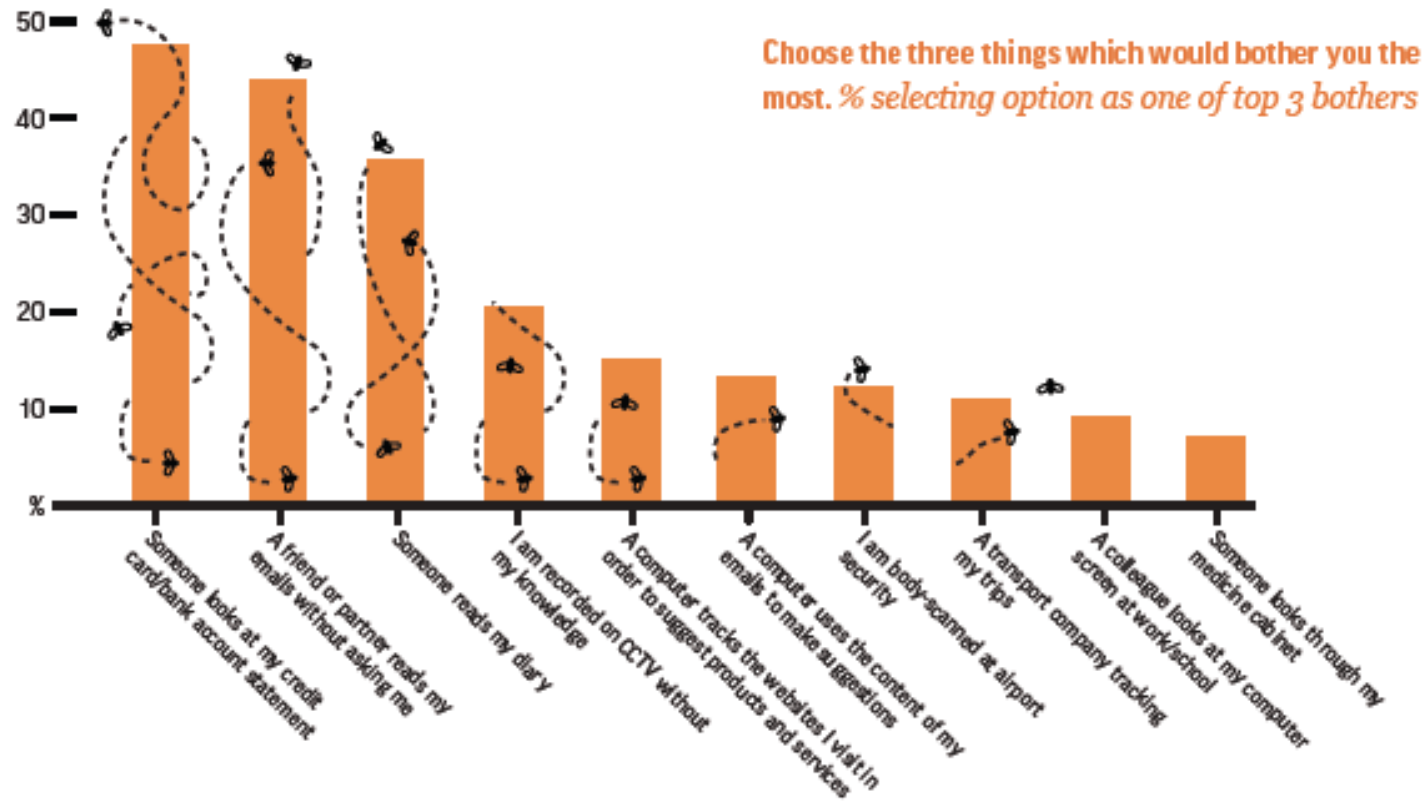
The fear of being hacked is universal, as are the associated fears of bank account and identity theft.

When confronted with a list of possible bad scenarios involving loss of personal privacy, over one-third (36%) of people said having their bank details stolen was the worst outcome

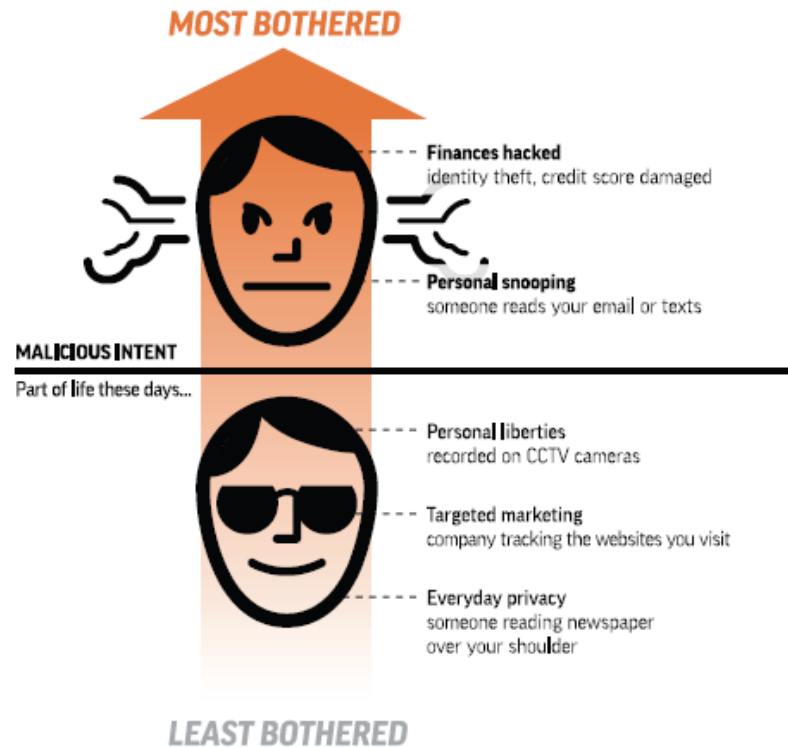
Security of their reputation

Errant (or false) posts online can cause loss of face, jobs, or relationships. These reputational fears are viewed as irreparable in some markets, particularly in Asia.

Financial security and/or security of reputation (i.e. snooping) are at top of the pile



The SEA consumers see it as a matter of intent



But of course, not all consumers have similar attitude towards privacy

There are five groups of consumers based on their attitude towards privacy



Savvy Shoppers, embodies the data trade-offs necessary in this brave new world of sharing. Largest group



Sunny Sharers is the second largest group of consumers. This optimistic group is able to see the positive outcomes associated with sharing data



Walled Worriers are also the most sensitive to perceived invasions of privacy. They are the third largest group



Eager Extroverts are defined by their love of mobility and sharing through social media. Fourth largest group.



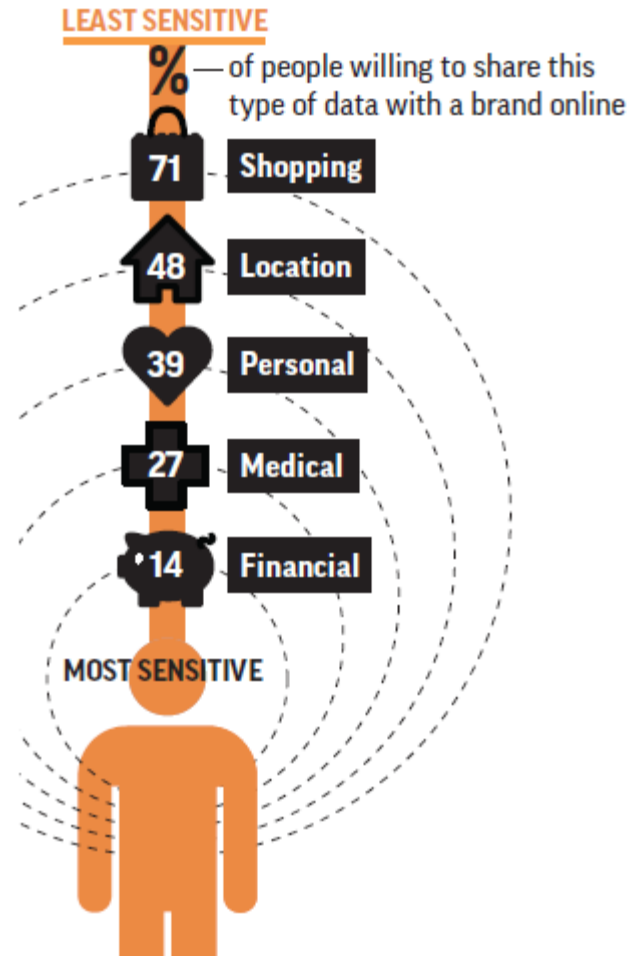
Cautious Communicators. The smallest group. This group is defined by their pronounced dislike of mailings, messages and other forms of frequent contact.

The dominance of Savvy Shoppers (and Eager Extroverts and Sunny Sharers) means that consumers understand that there are major benefits associated with sharing data with businesses online

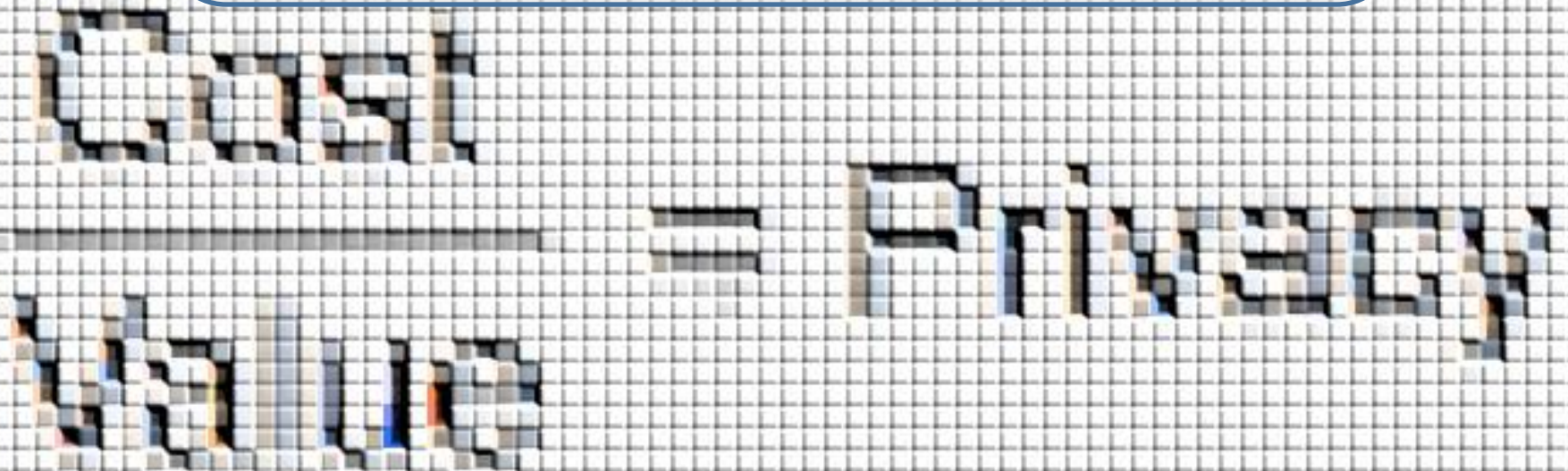
Top two benefits that attract these consumers for sharing their data are:

1. Better access to discounts and promotions,
2. Companies can show them new things that they actually want

However, the openness for sharing is more for shopping data and least for financial



THE PRIVACY EQUATION

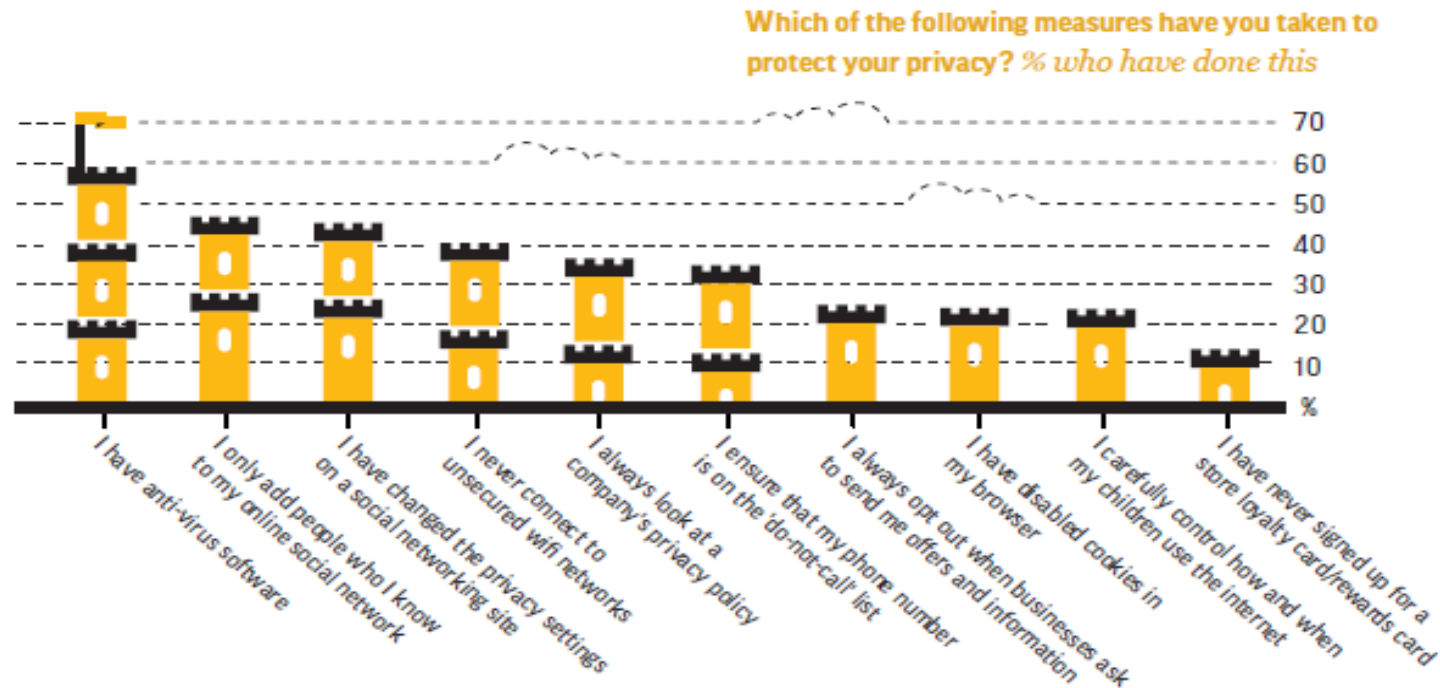


A 3D-rendered equation on a grid background: DATA = Privacy + VALUE

Data has become valuable good – to be protected, traded and monetized

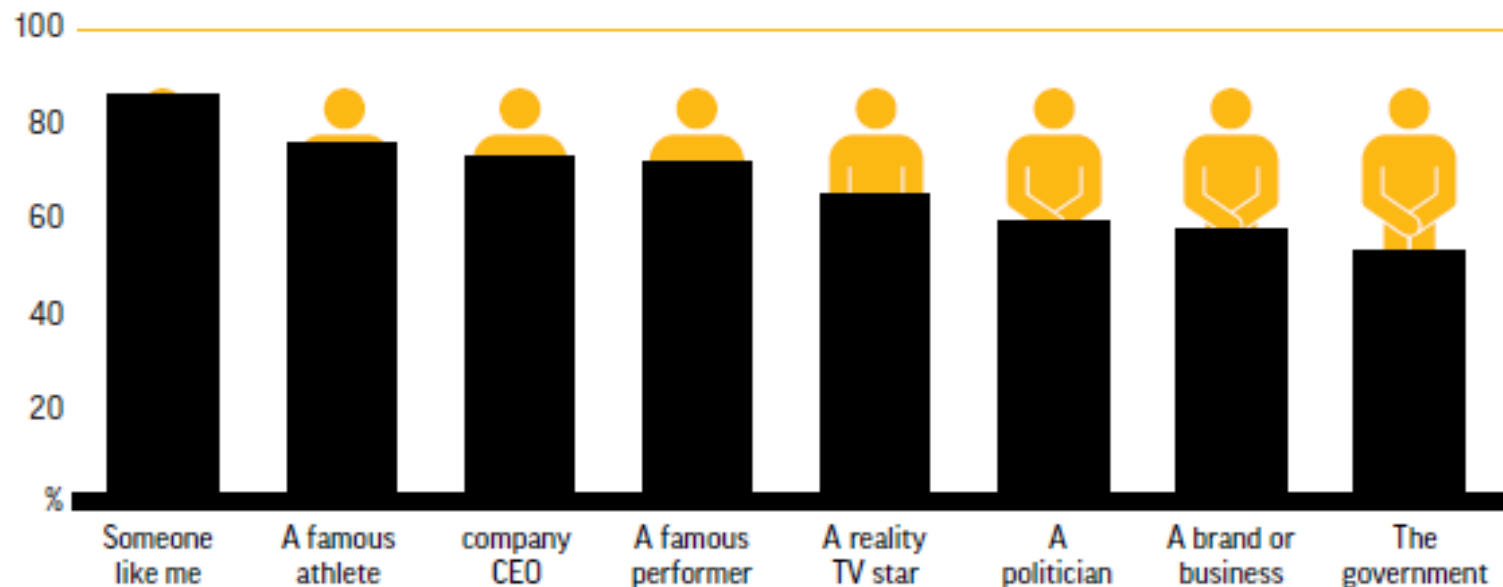
Consumers are becoming savvier in protecting this valuable good

Young rely on technical expertise like software and settings management; while older generation relies more on anecdotes and share limited information



Increasingly, governments and businesses will need to recognize that privacy is a two-way street

Consumers may be willing to share more of their personal information (in order to gain benefits) but they expect a greater degree of transparency in return.



How much privacy do they have a right to when it does not pertain directly to their work? % responding "total right" or "some right to privacy"



**ADVICE FOR BRANDS:
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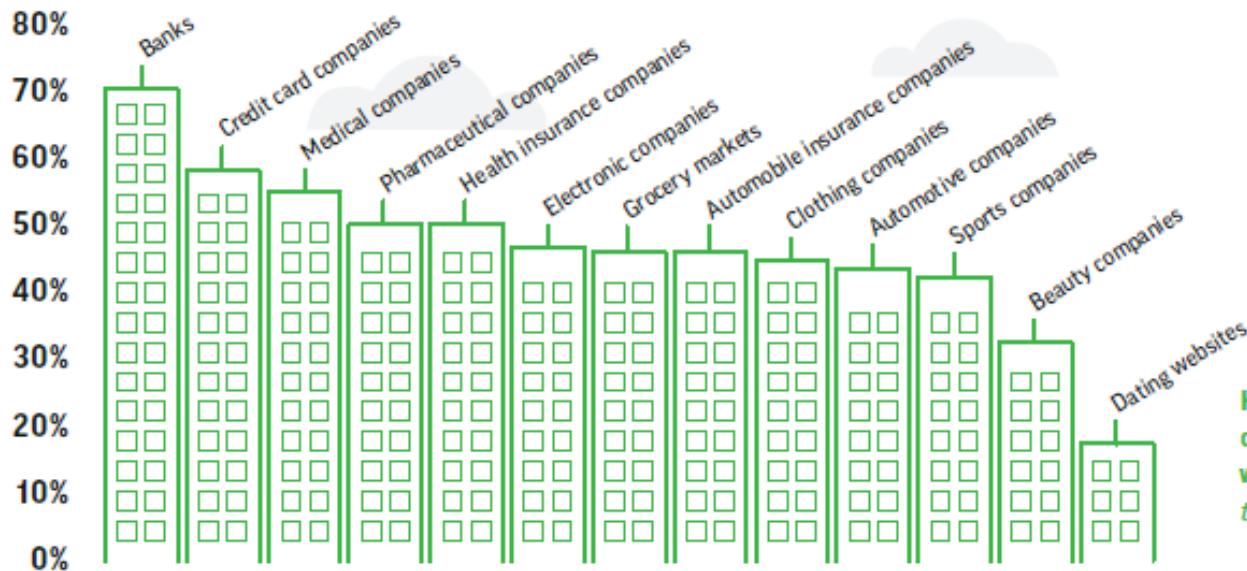
Interestingly, on-line brands are trusted the least by consumers on data security

- It's intuitive that the companies leading the charge towards increased sharing are also seen as the greatest threats to privacy
- In particular, Facebook (54% of people) and Twitter (41%) are seen as the most worrisome. These two brands are virtually the embodiment of the brave new world of sharing.

“Facebook wasn't made for a private or secretive person.” - Respondent

On the other hand, banks and credit card companies are trusted the most with data

Considering that consumers are so sensitive about their financial information, this is a strong sign of trust



How much would you trust each of the above types of companies to look after your personal data and use it wisely % responding "trust them a lot" or "trust them somewhat"

Possible reason for this trust: a proactive response to new norms

- Banks and credit card companies cultivate an increased sense of responsibility among consumers, with reminders for passwords and security verification
- There are embedded protective features for automatic responses to ensure consumer security such as logging someone off after they have gone idle

There are emotional reasons too to trust banks

- The imagery of banks is all about secrecy and protection of assets
- Even in an era when most of our lives are digital, our most precious assets are physical, and the most precious of these are usually kept in safe deposit boxes
- Trusted representatives and procedures are in place to help consumers feel safe and secure at a time of increased vulnerability/ emergencies

Consumers seek commitment from companies that they won't pass personal data

Which three things below are most important to you? % selecting option as one of top 3 most important criteria



Control, choice, commitment and compensation are the key to assurance and trust

For all types of company and brands, we believe that there are four key dynamics to privacy when it comes to maintaining a proactive, productive and share-worthy relationship with consumers



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