

Data Privacy and Brand Trust in Asia Pacific

Turning Risk into Opportunity



Table of Contents

1. Executive Summary	03
2. Data Privacy Jeopardises Your Business	04
Acknowledge It	
3. Data Privacy Worries Consumers	07
Listen to Them	
4. Data Privacy Impacts Product Choices	11
Address It	
5. Data Privacy Clashes with Personalised Advertising	16
Know the Boundaries	
6. Conclusion	21

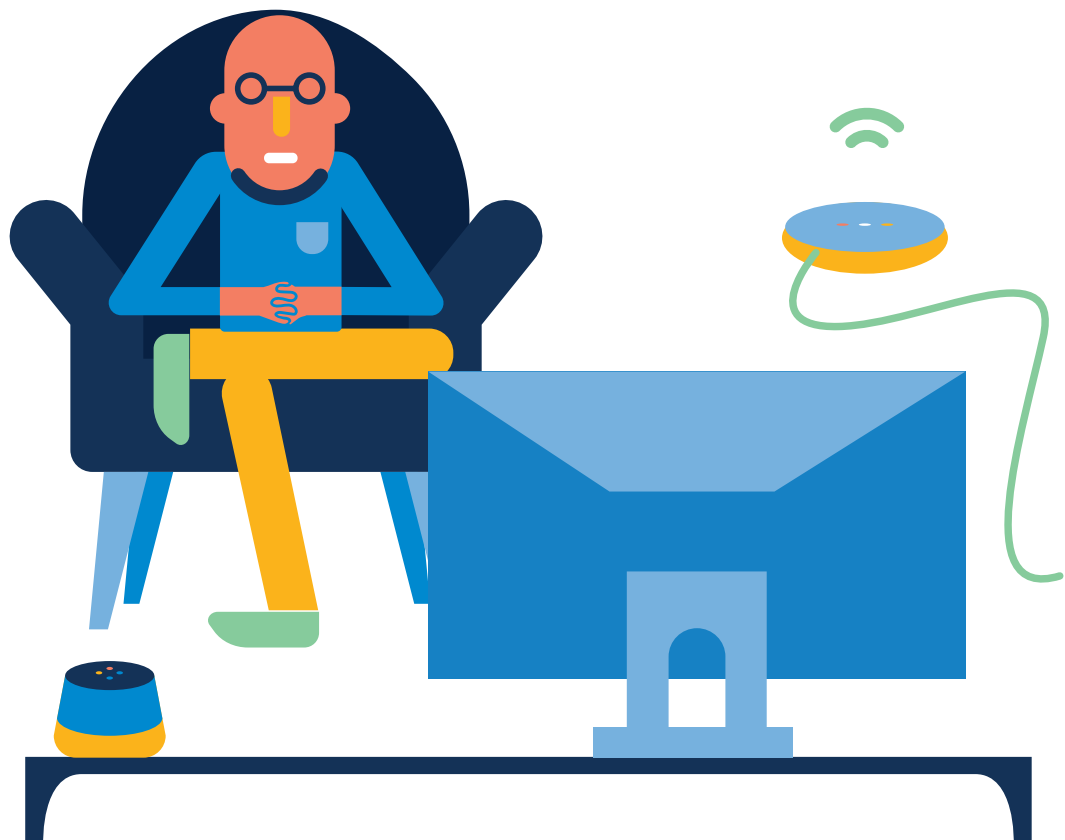
Executive Summary

Today's Asia Pacific consumers are concerned about data privacy and are taking steps to protect their personal information. This trend will only grow in the future and eventually impact all brands as we move toward an ever more connected world. This has significant implications for businesses as we know that trust drives brand value and business results.

Concern over data privacy is inhibiting adoption of technology and creating winners and losers among brands. To remove this barrier, businesses must offer control to consumers by being transparent, providing choice, and offering appropriate incentives. Through these actions, companies can reduce data privacy risk and turn it into a differentiating strength for their brand.

With the rise in web-connected technologies, there will be many new advertising opportunities, both in terms of data and advertising space. From a consumer's perspective, companies will need to carefully consider which of these opportunities to pursue. The home will be a key location, requiring extra sensitivity in terms of how and where to advertise within it. The benefits of advertising will need to be clearly conveyed to consumers and the limits of comfort defined.

This report considers all these issues in depth, from a consumer perspective, based on extensive research conducted in Asia Pacific. The findings and implications are dedicated to this region, also considering how countries within it differ and the need for localised strategies.



Data Privacy Jeopardises Your Business

Acknowledge It

When future history books are read, 2018 may be noted as the year that the world awoke to data privacy. In fact, to be more accurate, we should probably describe it as the year the world awoke to digital data privacy. Humans have always been worried about their privacy, but today the threats to their privacy have increased exponentially in line with the prevalence of technology. It is not surprising that governments around the world have started to take action. It is only surprising that they have not done so until now.

This raises an important point about how we define data privacy in this paper. It can be

tempting to define it in more limited information technology terms, but we choose to define it much broader in line with how consumers would see it. To consumers, data in this context means “any piece of information about me” and privacy is “my right to withhold information from other people, businesses and even governments”. Privacy is enshrined under Article 12 of the Universal Declaration of Human Rights.

Turning now to business, we can view data privacy as a composite of trust.

Relationship Between TrustR and Brand Value

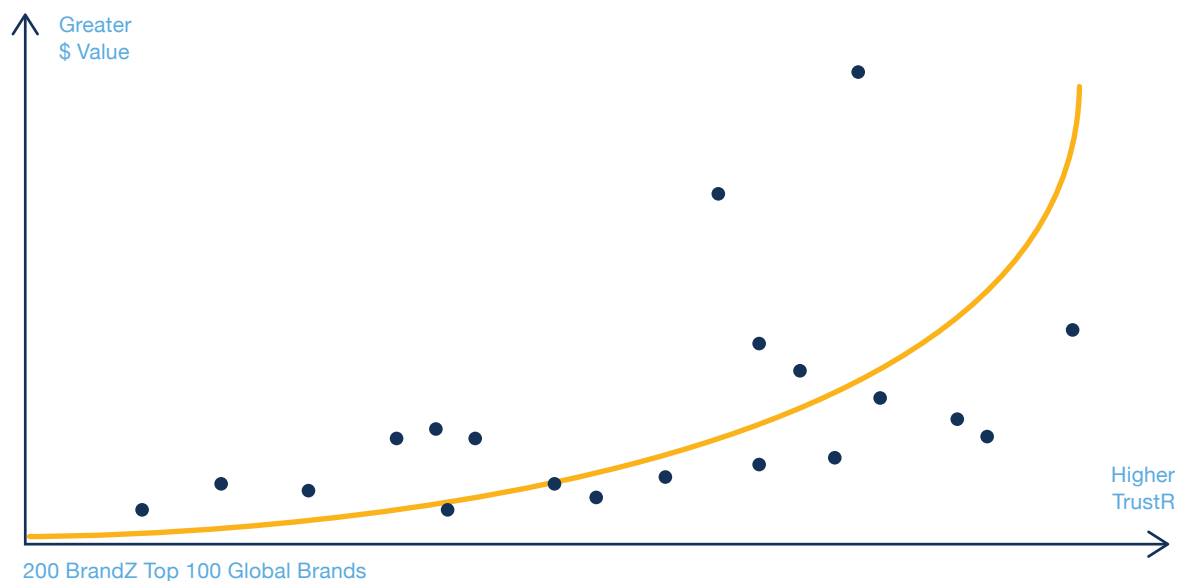


Figure 1

200 BrandZ Top 100 Global Brands

Source:
Kantar Millward Brown BrandZ

We know that trust in companies and brands is a key driver of business growth. Figure 1 shows the relationship between TrustR (a composite measure of trust and the likelihood to recommend) and brand value as determined by the annual BrandZ Top 100 Most Valuable Global Brands ranking. More trust equals better business results.

For some companies, data privacy is already at the centre of their strategy to build trust and therefore growth. Facebook and Apple are prime examples from the front lines as we see their increasing efforts to either abate data privacy as a weakness or leverage data privacy as a strength. In the case of the former, we can reference the

“apology advertisements” from Mark Zuckerberg that appeared in major news publications in the United States and United Kingdom in March 2018, and in the case of the latter, we have the notable example of Apple’s, “What happens on your iPhone, stays on your iPhone” billboard timed to coincide with the 2019 Consumer Electronics Show in Las Vegas.

The data gathered from this research underlines why, rightly or wrongly, nearly two times as many consumers perceive Apple as trustworthy versus Facebook, reflecting the impact that data privacy scandals can have on company reputation.

Brand Image

% Who Say Brand “Can Be Trusted”

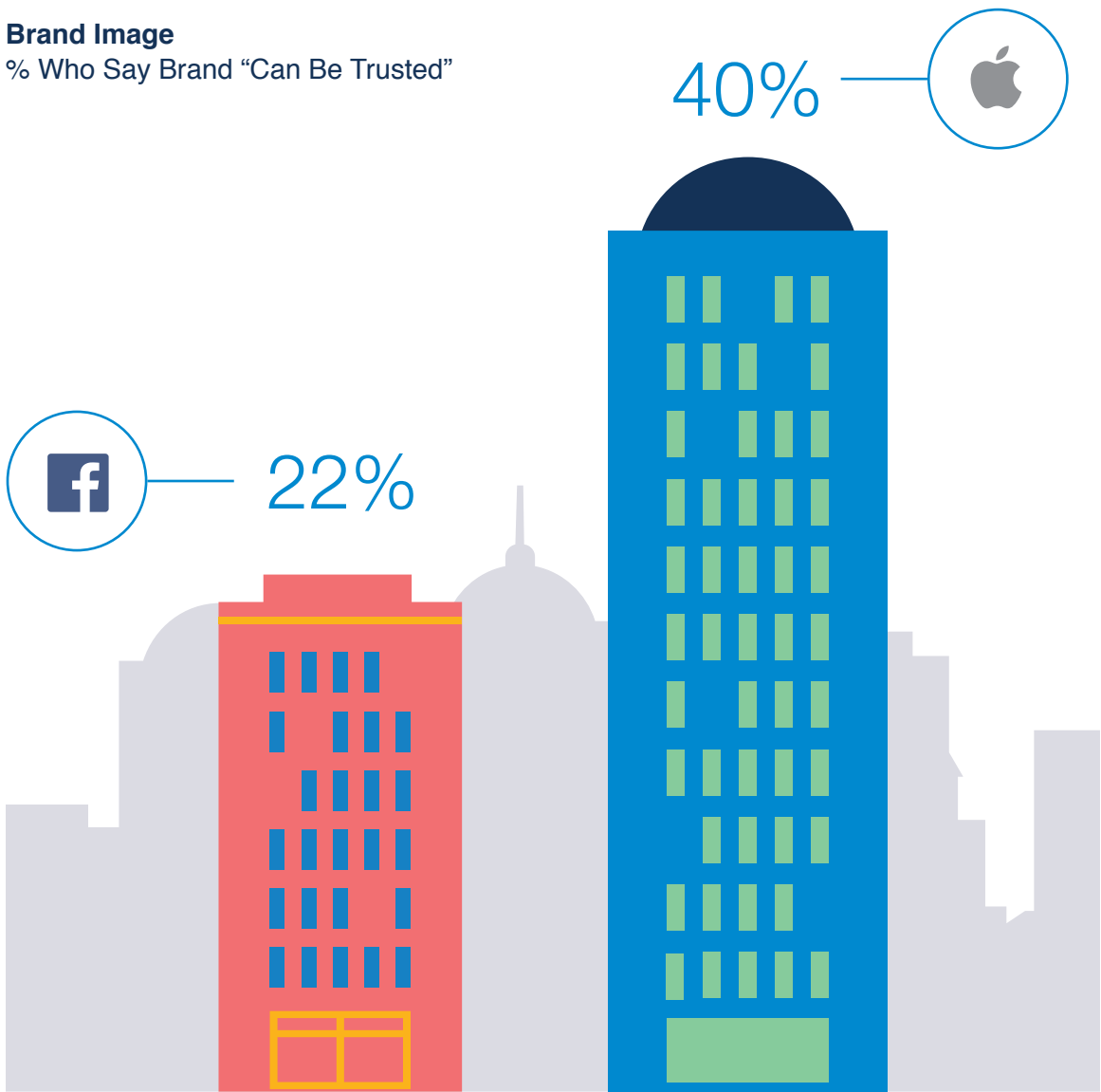


Figure 2

Base: 4,099 survey respondents aged 18+ from seven countries in Asia Pacific

Q: In your opinion, which of the following companies do you think can be trusted?

This is a threat and an opportunity as evidenced by Facebook's testimony in front of various international governments or Apple's dealings with law enforcement in cases such as the San Bernardino shooters.

While "technology" companies are at the forefront, it is critical to note that data privacy issues are only going to widen and deepen in the future. As we move toward the "internet of more things," there will be very few businesses immune to the need for careful consideration of data privacy. Since beginning to write this document, we have seen the example of Singapore Airlines with the criticism it faced over the installation of cameras into the back of plane seats and their need to counteract concerns. Data privacy concerns will touch every business that engages people and in turn form a crucial component of the trust that drives business growth. This must be acknowledged today to chart the course for your business' future.

In this paper, we are going to make three main points, dedicating one section to each. In the next section, we will focus on the extent to which consumers are worried about data privacy. Following that, we will focus on data privacy as a barrier to usage of products and services. For the final point, we will focus on consumers' discomfort with personalised advertising.

For all sections, we are focused on a consumer perspective rather than a pure technological one. Even if the technology is capable, we are asking what consumers want and do not want to happen.

This paper provides an Asian perspective based on results from 4,099 interviews conducted in seven countries around Asia Pacific, therefore aiming to reveal insights and implications for how this region is different from others and how the markets are different within it.



Data Privacy Worries Consumers

Listen to Them

Before we talk about data privacy specifically, it is important to note that consumers in Asia Pacific are passionate about technology and the impact it has had on their lives.

Consumers' Attitudes Toward Technology



Figure 3
% Agree/Strongly Agree

Base: 4,099 survey respondents aged 18+ from seven countries in Asia Pacific

Q: How much do you agree or disagree with the following?

While this is likely to be true globally, this is particularly true in Asia Pacific given how advancements in technology have directly overlapped with rapid growth in many market's economy and living standards. This is illustrated in Figure 4.

GDP Per Capita of Markets Surveyed in Asia Pacific Since Invention of Internet in 1991

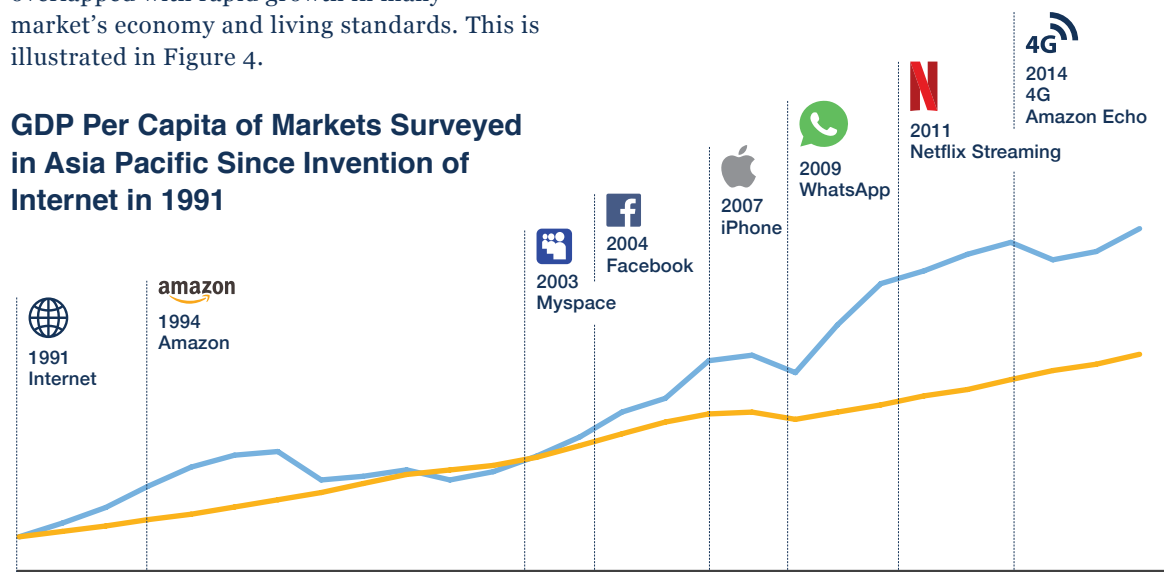
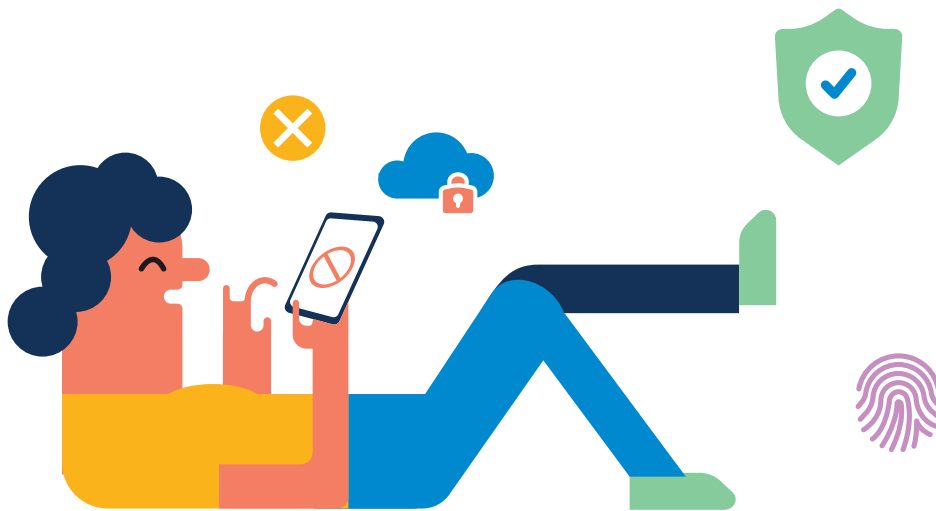


Figure 4
— APAC
— US

Source:
World Bank and CEIC

Note: GDP Per Capita includes Hong Kong, Indonesia, Malaysia, New Zealand, Philippines, Singapore and Taiwan



However, while consumers do not reject technology, and on the contrary embrace it, it is remarkable to see how strongly data privacy concerns have already penetrated the region. As we can see from Figure 5, approximately two-

thirds of consumers indicate they are concerned with data privacy and three in ten are strongly concerned. Only one in 10 consumers indicate they are not concerned.

Overall Concern Over Data Privacy

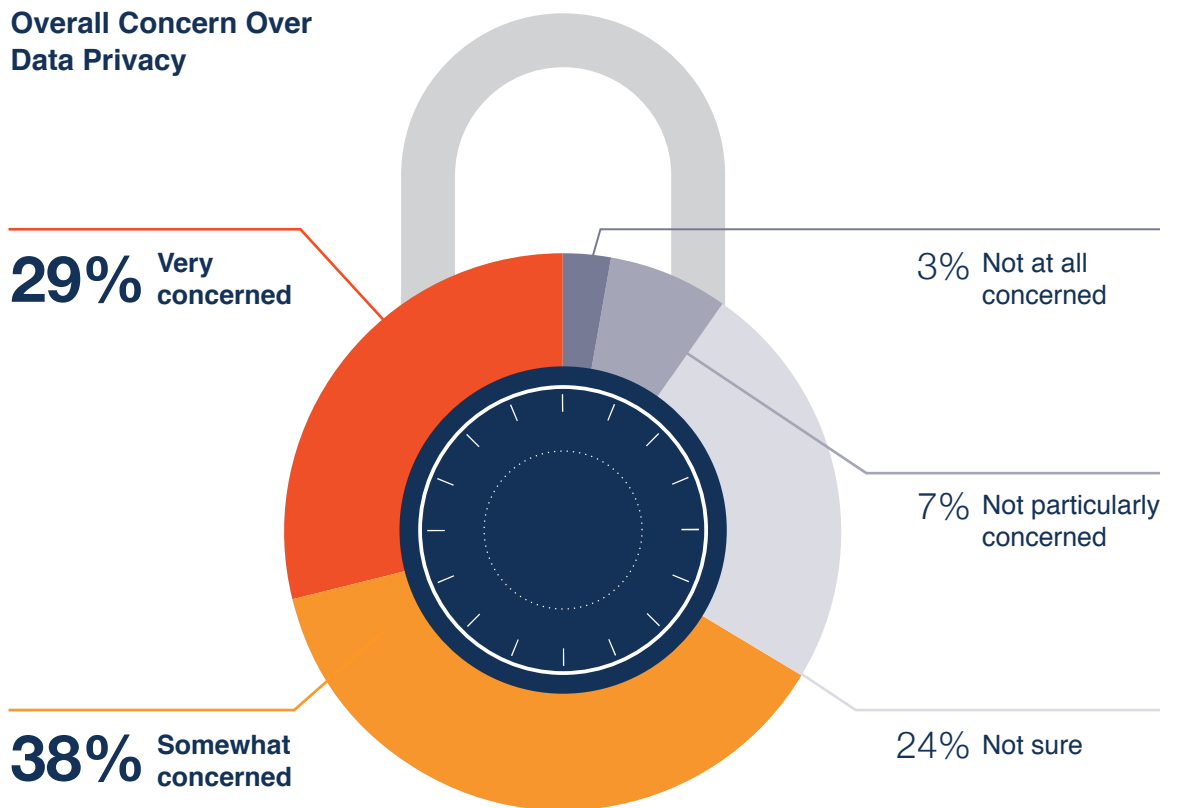


Figure 5

Base: 4,099 survey respondents aged 18+ from seven countries in Asia Pacific

Q: Overall, how concerned are you with the privacy of the information companies collect about you?

In the future, we can only expect the number of concerned consumers to increase. To demonstrate how this might happen, we integrated the collected survey data in Singapore with our [m]PLATFORM capability.

For those consumers who have opted in, this enables us to not only see their survey responses but also those same consumers' technographic and behavioural information using [m]insights.

In Figure 6, we can see the online behavioural profile of those who are concerned with data privacy versus the profile of those who are not concerned. The bottom right quadrant shows those behaviours that are unique to data privacy concerned consumers and the top left shows

those that are unique to non-concerned.

As we can see from the chart, consumers concerned with data privacy are more likely to be business and technology focused while non-concerned are focused toward family and lifestyle. This makes sense intuitively and anecdotally - the prevalence of parents posting photos and information about their children online would be evidence.

This also demonstrates a predicted future path for data privacy concern. As the knowledge of technology and data broadens beyond the business and technology focused, we could predict many more consumers becoming data privacy concerned.

Behavioural Profile of Data Privacy Concerned Consumers vs. Non-Concerned

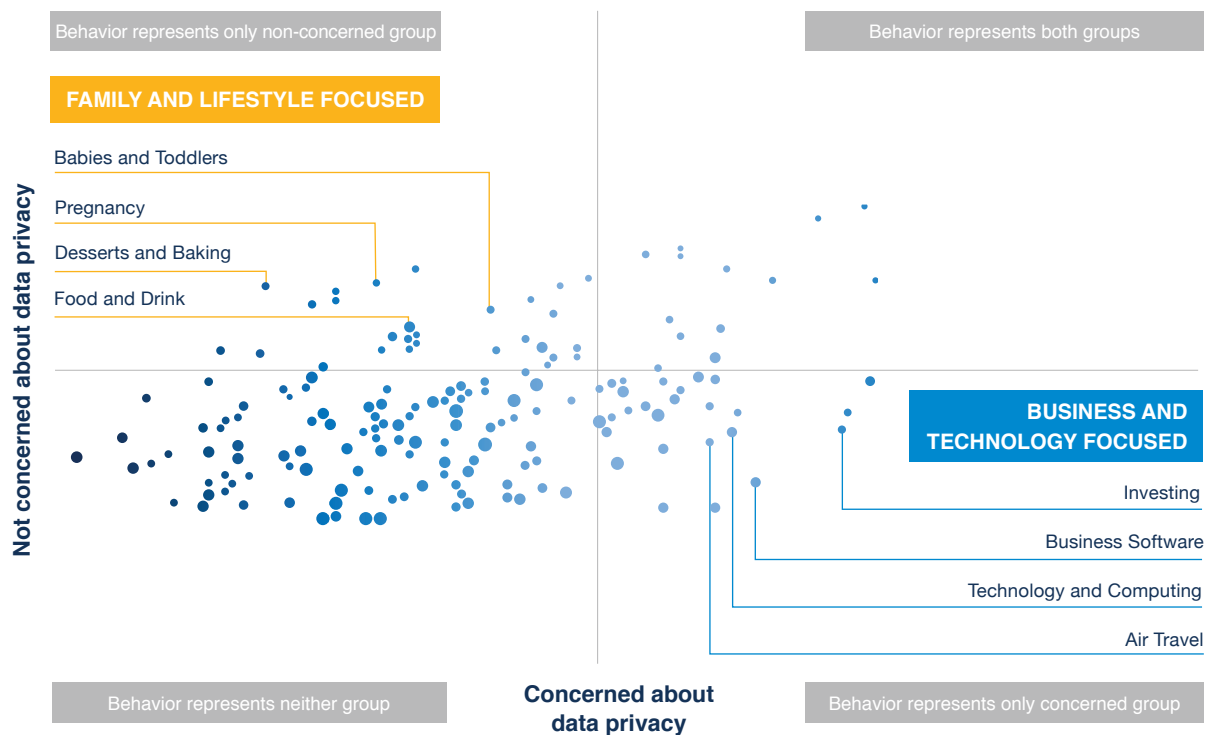
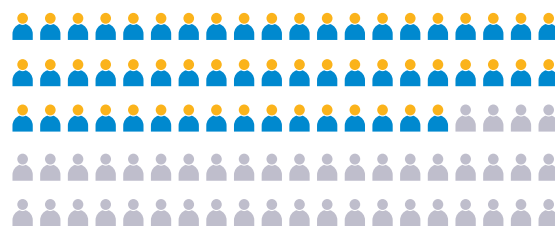


Figure 6

Source:
GroupM

Acknowledging that consumers are concerned, the big questions then become, “Do consumers feel strongly enough and are they informed enough to take concrete actions based on their concerns”. Attitudes and behaviour do not always match. We will explore this in more detail in the remaining sections of this paper, but on an overall level, over 50% of consumers say they are already taking steps to restrict the information they share. This could be anything from posting photos online, to sharing phone numbers, to installing ad blockers - but the intention is clear.

% Restricting More Personal Information Companies Collect vs. 2017



56% Are actively restricting more personal information companies collect

Figure 7

Base: 4,099 survey respondents aged 18+ from seven countries in Asia Pacific

Q: Compared to 2017, to what extent are you actively restricting the information companies collect about you via their product/service?

For a continent that comprises nearly 60% of the world’s population, we would expect variations in attitudes and behaviours toward data privacy. It is not the intention of this paper to go into a detailed analysis of market-by-market differences, but throughout the remaining sections we will highlight a few key considerations in customising the implications to a market. The key overall point is that your data privacy strategies should at least be formed

with the same focus on localisation that you would apply to any other business decision or marketing campaign - arguably, even more so given that data privacy is almost by definition a local human issue.

There are various sociocultural, economic, political, and technological reasons that can create variations, some of which you can see in Figure 8 below.

Factors Influencing Attitude and Behaviour Toward Data Privacy

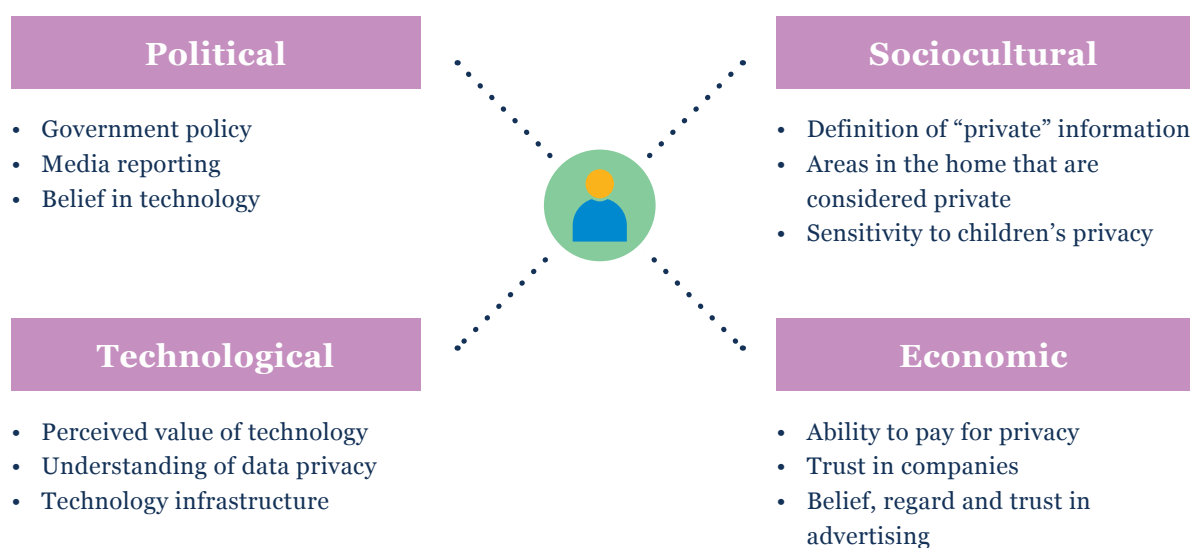


Figure 8

Data Privacy Impacts Product and Service Choices

Address it

Today, data privacy concerns are inhibiting adoption of technology.

Data Privacy as a Barrier to Smart Home Adoption

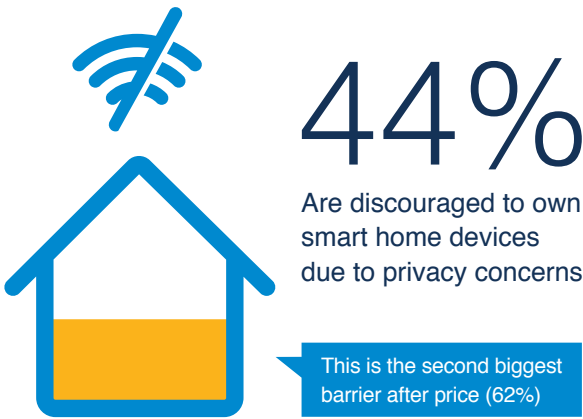


Figure 9

Base: 4,099 survey respondents aged 18+ from seven countries in Asia Pacific

Q: Which of the following would discourage you from owning smart home devices in the future?

Around Asia Pacific, approaching one half of consumers indicate data privacy as a concern that would discourage them from owning smart home devices and appliances connected to the internet. This is the second biggest barrier after price.

In all surveyed markets, we can see this trend is consistent. In all markets, data privacy concern is a top three barrier, and in many is the second highest barrier behind price. It is a concern everywhere. We also indexed the data privacy barrier versus the average of all barriers measured to show its prominence. When looking at this index, we can see data privacy concern emerging as an even stronger relative barrier in places like Hong Kong and New Zealand versus Southeast Asian markets like Indonesia, Malaysia, and Philippines. There will be various reasons for this, but it certainly makes sense given that emerging markets will have greater inherent challenges to adoption in terms of infrastructure or economics. However, over time, these fundamental barriers will dissipate and the “softer” concern of data privacy will rise. Of course, this is also true for wealthier, developed markets as technology becomes cheaper. Eventually, at different points in time, we can predict data privacy becoming the number one concern everywhere.

Barriers to Owning Smart Home Devices: Ranking and Index of Data Privacy vs. Average of All Other Barriers*

	MY	PH	ID	TW	SG	HK	NZ
Ranking	2	2	2	3	3	3	2
Index	151	152	153	167	169	181	182

Figure 10

Base: 4,099 survey respondents aged 18+ from seven countries in Asia Pacific

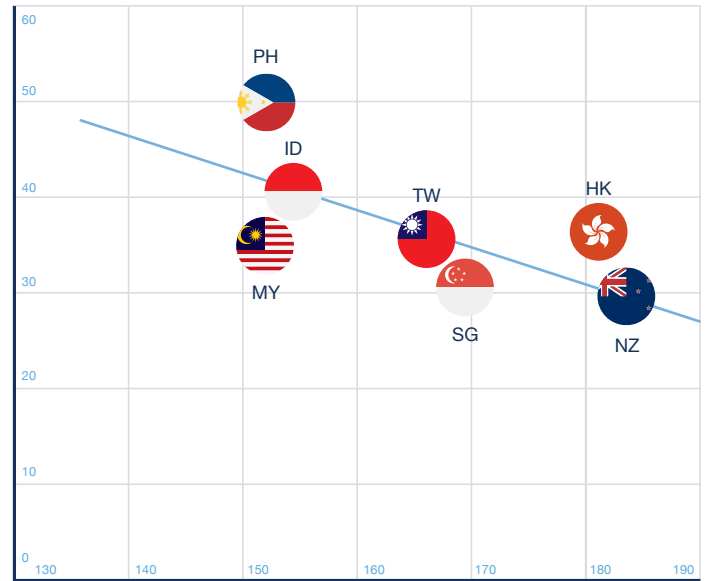
Q: Which of the following would discourage you from owning smart home devices in the future?

*Average score of 14 barriers measured

Interestingly, if we plot the indexed prominence of data privacy as a barrier against the desire to own a typical smart home device such as a smart speaker, we see a strong negative correlation. In other words, the more people who indicate data privacy as a barrier to adoption of connected home products, the less interest there is in owning a smart speaker. Concern over data privacy is stopping consumers from adopting and using products or services.

Prominence of Data Privacy Barrier vs. Desire to Own a Smart Speaker

% of respondents who desire to own a smart speaker



Index of data privacy vs. average score of barriers

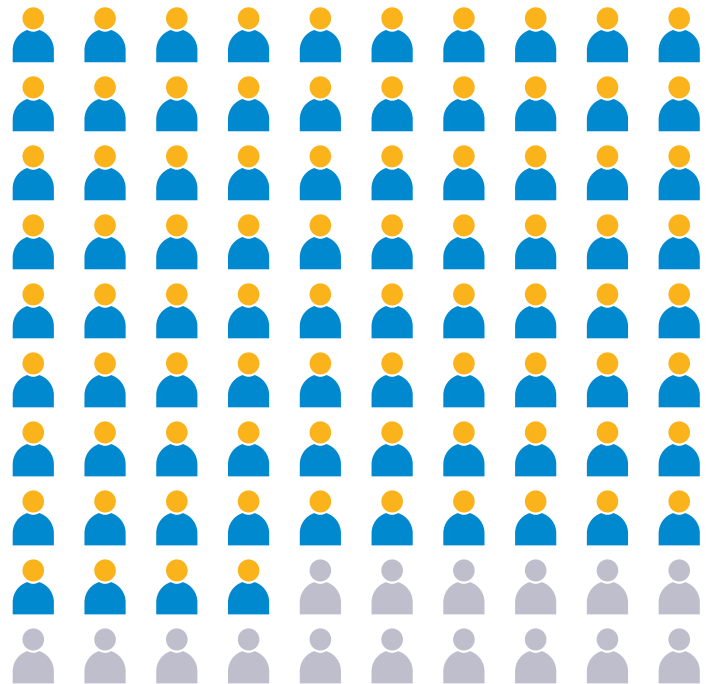
Figure 11

Base: 4,099 survey respondents aged 18+ and 3,583 non-smart speaker owners from seven countries in Asia Pacific

Q: Which of the following would discourage you from owning smart home devices in the future?
Q: To what extent would you like to have a smart speaker in your home?

The number one concept we need to embrace to remove or reduce the data privacy barrier is control. We see this clearly from our research with most consumers in Asia Pacific wanting more control over how their personal information is used.

Consumer Desire For Control Over Personal Information



84% Want more control over how their personal information is used

Figure 12

Base: 4,099 survey respondents aged 18+ from seven countries in Asia Pacific

Q: How much do you agree or disagree with the following?

For there to be control, there needs to be transparency and choice. At this stage, consumers may not be able to precisely articulate what the “control” they desire looks like, but as they become more aware of data privacy issues and the value their data has to organisations with whom they do business, they will become more calculating in terms of what they will accept and reject.

A certain percentage of consumers will reject any use of their data. From our study, we see that on average 51%* indicate they would be less likely to consider using a product or service if their data were used. This is strong evidence of the need for some form of “data private” option which

would be an extension of advertisement-free paid services for certain companies but refers more broadly to data not being used. It is therefore applicable to all companies. There may be grades of privacy provided at different rates and differing levels of incentive.

However, we do not believe that 51% of consumers would actually take up this option. The number itself is accurate as of today but is reflective of the transparency and relatively limited choice currently available. For example, none of the largest social networking sites offer paid options yet. If we look at this from the perspective of incentive, it tells a slightly different story:

% of Consumers Who Do not Mind Companies Collecting or Using Their Data If Incentivised

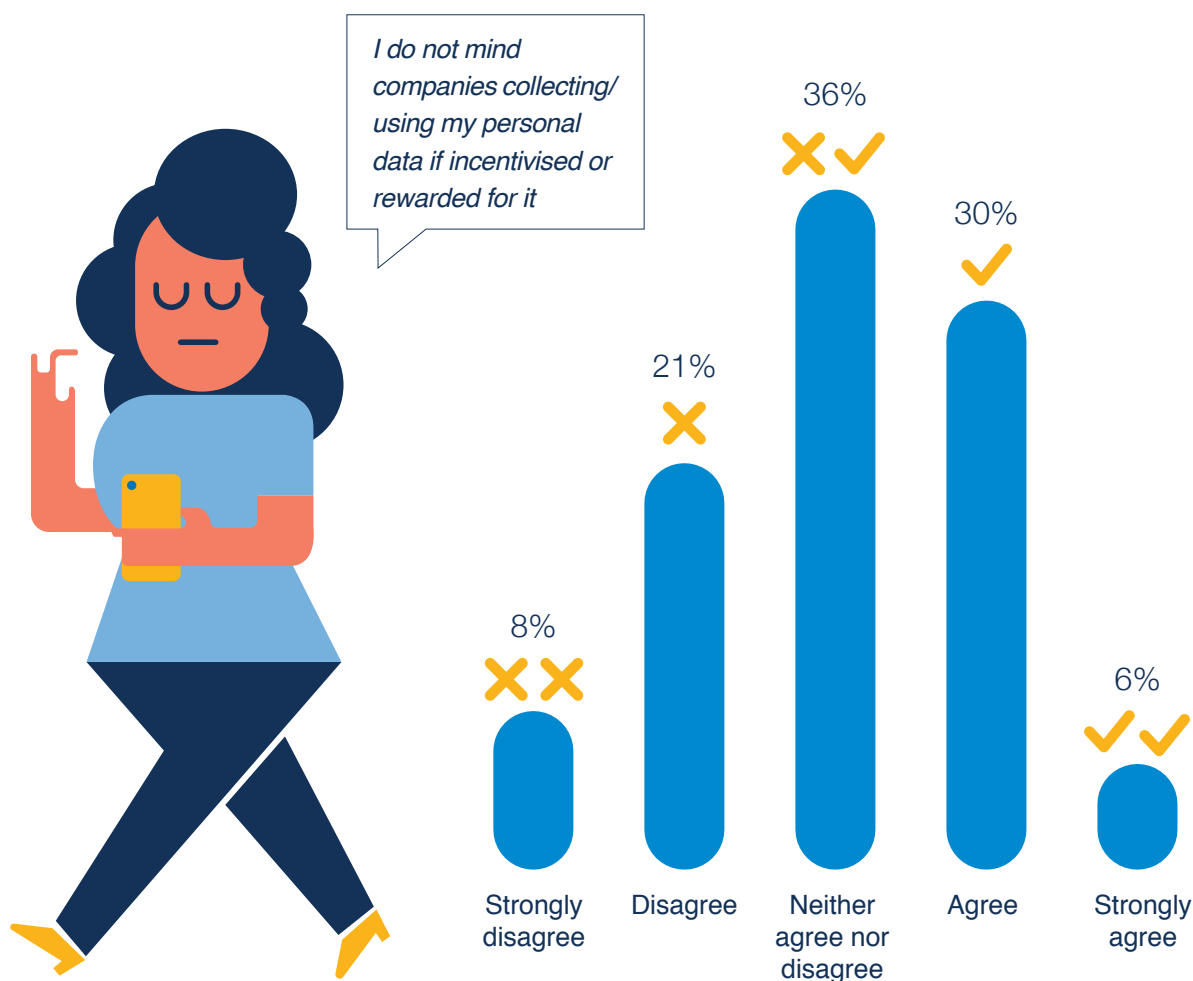


Figure 13

Base: 4,099 survey respondents aged 18+ from seven countries in Asia Pacific

Q: How much do you agree or disagree with the following?

*Overall average is the average score of the various ways companies use data across three topics in all markets

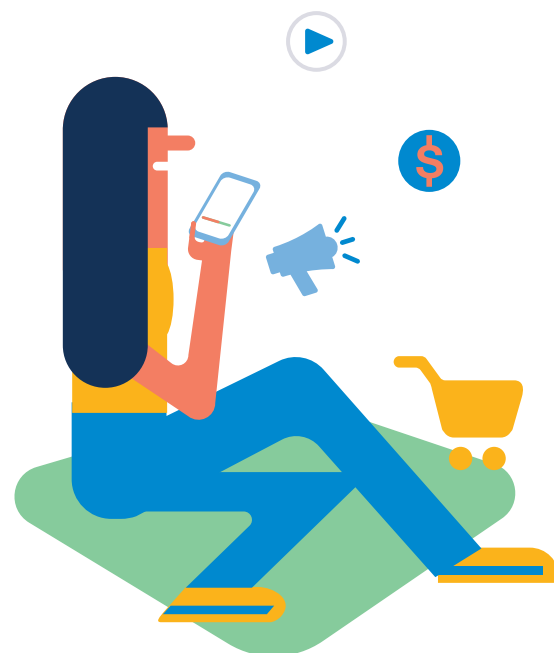
On one hand, the data above paints quite a negative picture in showing that only just over one-third of consumers agree that companies can collect data in return for incentives. However, looked at another way, only 29% disagree with this principle. There is a significant number (over one-third) who are undecided. Consumers are not wholly opposed to bargaining with their data.

Of course, the details of what those incentives look like will be specific to a given business, but we can see a general pattern in the table below when we break out the 51% figure presented above by how the data is used. As we move further and further away from a direct benefit to consumers, there is a greater likelihood that use of the data for that purpose would prevent adoption of a service.

In the case of sharing with other companies, the negative result is presumably not only due to the lack of perceived benefit to them but also due to the core issue of loss of control over their data, their possession, and losing trust in the source company with whom they shared it. A study in the United States reported that seven

in 10 respondents are willing to share their buying habits “at the right price” with a brand competing with the one they typically use. In general, 59% of willing consumers would make the trade only if a discount of 10 - 30% is given, while others expect at least a 40% discount (Blis, 2019)*.

*Source: Blis, “The Currency of Data: Quantifying the Value of Consumer Information in 2019”, Jan 22, 2019



% of Consumers Who Say They Would Be Less Likely to Consider a Product or Service if Their Data is Used

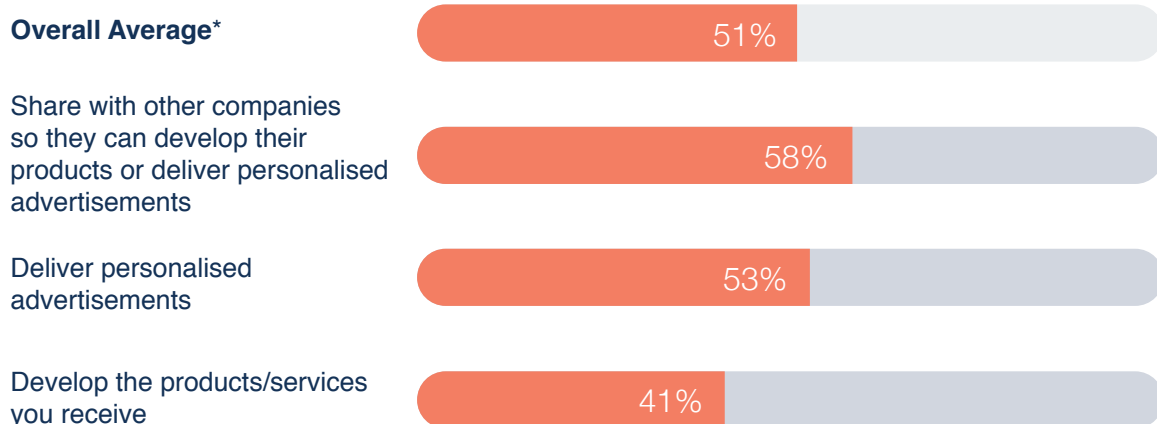


Figure 14

Base: 1,660 non-smart home owners (excluding smart TV), 514 non-VOD users and 1,277 non-mobile wallet users from seven countries in Asia Pacific

Q: How will the different scenarios below on how <topic> companies use personal data influence your likelihood of considering to use <topic> in the future?

Note: Percentages are calculated using average of scores for the same question for Connected Home, VOD and Mobile Wallet across all markets
*Overall average is the average score of the various ways companies use data across three topics in all markets

In the case of personalised advertisements, companies who make most of their revenue from advertising tend to claim that data collection benefits consumers as they are shown advertisements of more relevance. There is also, of course, the fundamental proposition of offering consumers free content or service in return for seeing advertisements. Companies will need to communicate even more effectively this proposition to consumers in the future and be cautious over the precise nature of data used. This will be discussed in more detail in the next section.

In the case of developing products or services, we can see this as an opportunity. If the benefit is clearly articulated to consumers, even if there is also a benefit to the company, consumers will be more willing to have their data collected. The viability of this strategy clearly relies on the fundamental trust a consumer has in the brand and company.

Therefore, while details will vary, consumers are not necessarily saying they do not want their data to be used, rather that they would consider allowing it to be used if they were appropriately incentivised. It should again be noted that it is important to pay attention to local nuances when developing these principles. When we look around

Asia Pacific, we see large variation in the 51% figure reported above regarding less likelihood to consider a company if data is used. In New Zealand, we can see the figure is close to two-thirds of consumers, while in Indonesia it is barely over a third. This is a very large difference and again stresses the need to have localised strategies and perhaps customised solutions.

In this section, we have focused primarily on adoption and use of data for technology products and services. However, as mentioned in the introduction, it would be a mistake to consider that the barrier of data privacy concern is limited to such companies. We are moving toward a future where everything will be connected and in that sense, the data presented here is representative of the broader data privacy concerns that will affect adoption and brand choice. As an organisation, it will only become more important to clarify your position to consumers, provide them with the right range of choices (within the constraints of business viability), educate them on those trade-offs, and respect those agreements once they have been made. Given the complexity of the ecosystem, it is by no means easy to do this in a way that is accessible to consumers, but the reward for doing so will be the reduction of data privacy as a barrier for your brand and the creation of a meaningful advantage.

% of Consumers Who Say They Would Be Less Likely to Consider a Product or Service If Their Data Is Used

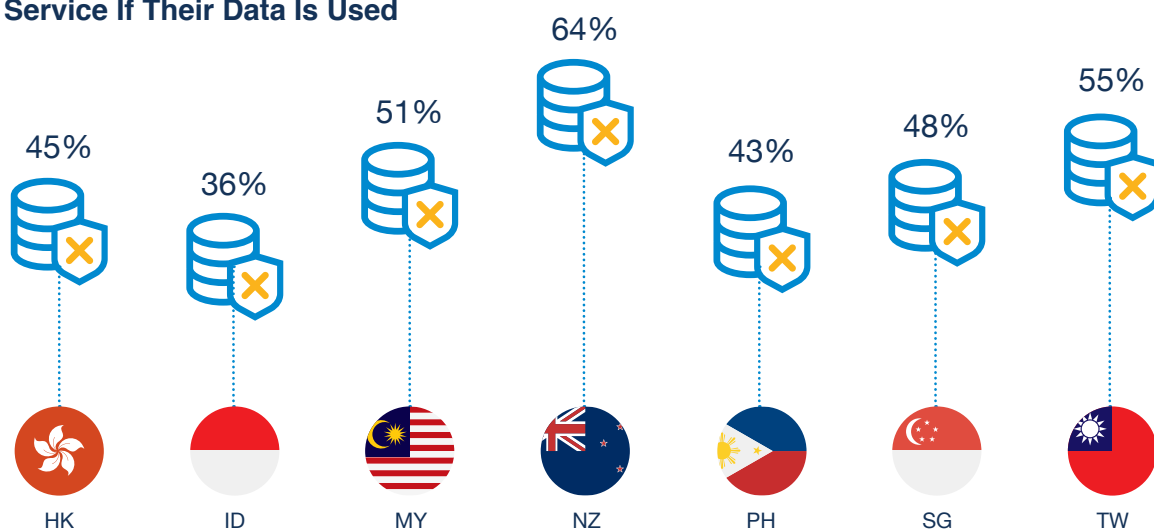


Figure 15
Overall Average*

Base: 1,660 non-smart home owners (excluding smart TV), 514 non-VOD users and 1,277 non-mobile wallet users from seven countries in Asia Pacific

Q: How will the different scenarios below on how <topic> companies use personal data influence your likelihood of considering to use <topic> in the future?

Note: Percentages are calculated using average of scores for the same question in Connected Home, VOD and Mobile Wallet

Data Privacy Conflicts with Personalised Advertisements

Know the Boundaries

The debate over personalised advertising is obviously a long and storied one. It has played out everywhere from popular culture; think 2002's *Minority Report*; to government committees. This debate is only going to become broader and more complex as technology itself becomes more capable of permeating all aspects of our lives. There are many areas we could focus on in this section, but we will focus on the home; by definition, the most private location in a person's life.

The proliferation of web-connected technologies and devices will proportionally increase the available data and locations available for advertising in the home. We should not see this as a linear progression but rather a step-change. While we might feel like digital advertising has

already been transformative on the industry, at a fundamental consumer level, we could argue it is just more of the same. Both television and current digital advertising are, primarily, localised to specific screens that you place yourself in front of. Connected home advertising, on the other hand, at its apogee, will enable the ambient collection of data and delivery of advertisements anywhere around the home. The key question we will pose in this section is not whether advertisers can capitalise on the opportunities in a connected home, since the technology is already available, but rather whether they should.

For various rooms around the home, we asked consumers how acceptable it would be for connected home devices to deliver personalised advertisements.

% of Consumers Who Would Accept Connected Home Devices Delivering Advertisements Around the Home

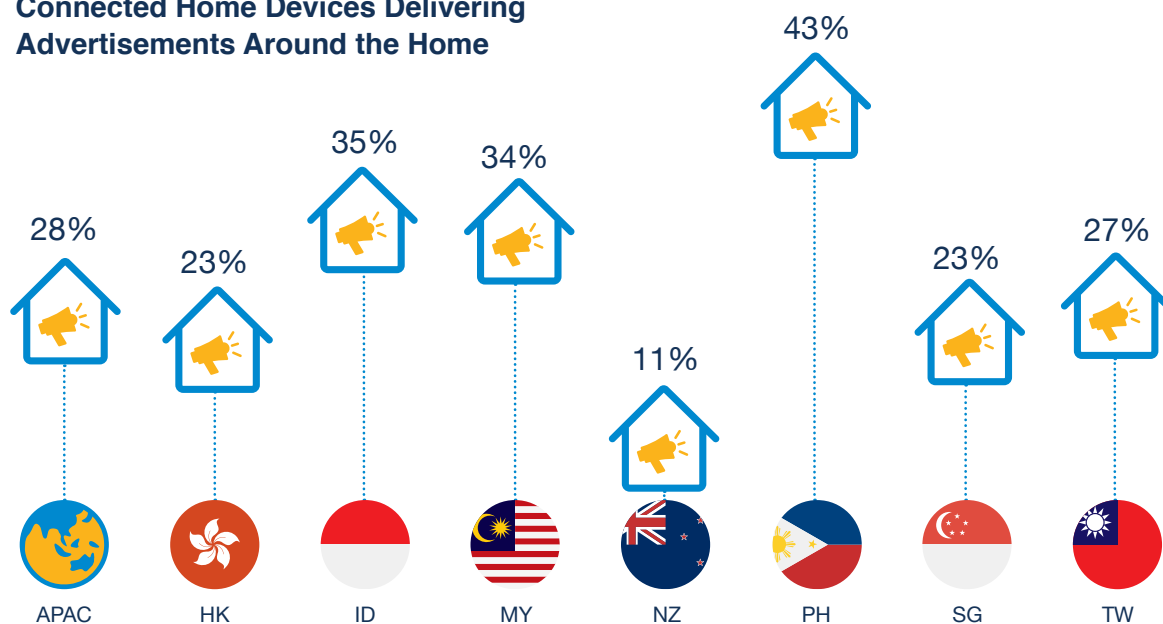
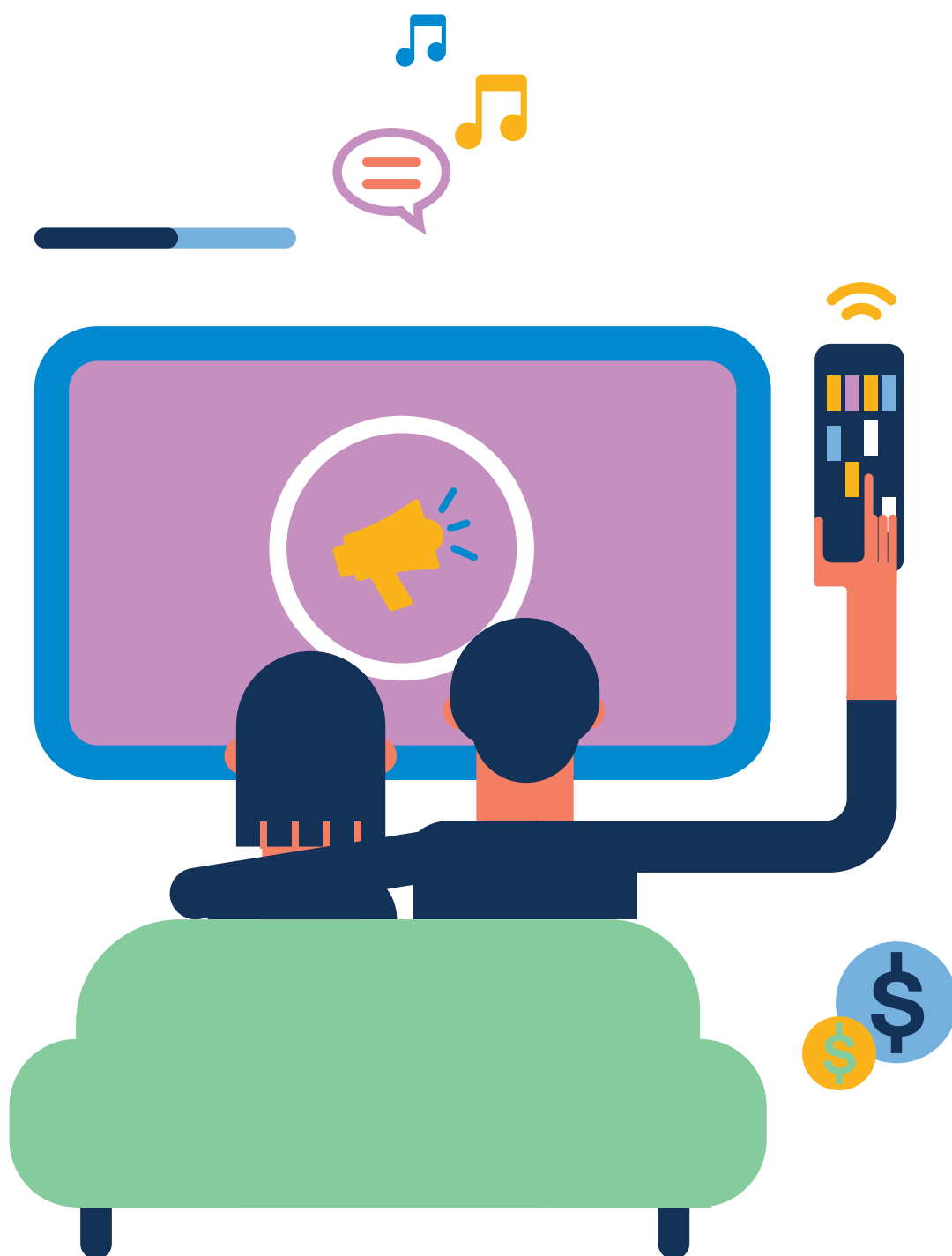


Figure 16

Base: 4,099 survey respondents aged 18+ from seven countries in Asia Pacific

Q: How acceptable is it for smart home devices to share personalized advertisements in the following areas of your home? Ads via smart home devices could come in the form of recommendations.

Note: Percentages are calculated based on average of kids room, living room, dining room, kitchen, work room, bedroom and bathroom



On average, only 28% of consumers indicate they would accept advertisements with the figure ranging from a low of 11% in New Zealand to a maximum of 43% in Philippines. While we should

not be surprised by these numbers, they are still startling if we put it in the context of what would need to be done to move consumers to a state of genuinely being satisfied with such advertising.

As we would expect, there is also variation in sensitivity between rooms in the home that would require consideration. We

asked consumers how willing they would be for connected home devices to deliver advertisements in each of the rooms below.

Acceptability of Connected Home Devices Delivering Advertisements in Specific Rooms vs. Market's Average



Figure 17
Room Index vs. Average
Room Acceptance in
Market

Base: 4,099 survey
respondents aged 18+
from seven countries in
Asia Pacific

Q: How acceptable is it for smart home devices to share personalized advertisements in the following areas of your home? Advertisements via smart home devices could come in the form of recommendations.

*APAC score is calculated based on average of all market's mean score across the seven different types of rooms
Note: Individual market's score is calculated by using <market>'s <room> score divided by average market's score across all types

As we would expect, the bedroom and bathroom are the most taboo areas even though for many companies, particularly companies in the consumer packaged goods (CPG) industry, these would be the most relevant areas in terms of their product line-up. Again, this draws the distinction between can and should. Given their more public nature, the kitchen, living room, and dining room would be relatively more acceptable locations, creating more obvious opportunities for home and furniture, electrical appliances, food and beverage companies, among others.

When comparing between countries, the “kids room” is a particularly interesting location. We might have expected discomfort in other markets and not just New Zealand, due to the fundamental need to protect children, but this is not generally borne out in the data. One hypothesis is that the criteria for acceptance of advertisements around the home is the human one of how willing we would be for another person to see us in that space. While that is understandable now, we should expect these criteria to diverge in the future as the nature of data collection and advertising becomes clearer to consumers. This was also reflected in the [m]insights data of Figure 6, where we saw that family focused consumers were less likely to

be concerned with data privacy. In the future, we can expect groups such as this to have both generally higher data privacy concerns and have more specific concerns for their home and family. This needs to be continuously monitored.

From a data utilisation perspective, this also suggests we should be cautious about the level with which we use data. If data is utilised at a tactical, creative messaging level, it can be more intrusive and disturbing for consumers to directly perceive how their data has individually informed advertising. Using data at a strategic segmentation level however, would likely be far less intrusive. To be clear, this does not mean we should not be 100% transparent with consumers on how their data is used, merely that we should help to define the limits of comfort.

In addition to showing caution over data usage, the key thing advertisers need to do when utilising data collected around the home for advertising purposes, or directly showing advertisements on smart home devices, is to convey the benefit to consumers. If we compare the attitudes toward the use of connected home devices to deliver advertisements versus the use of the devices to collect data to improve the product or service, we see the latter appreciated more.

Acceptability of Connected Home Devices Using Data to Improve Product or Service vs. Providing Personalised Advertisements

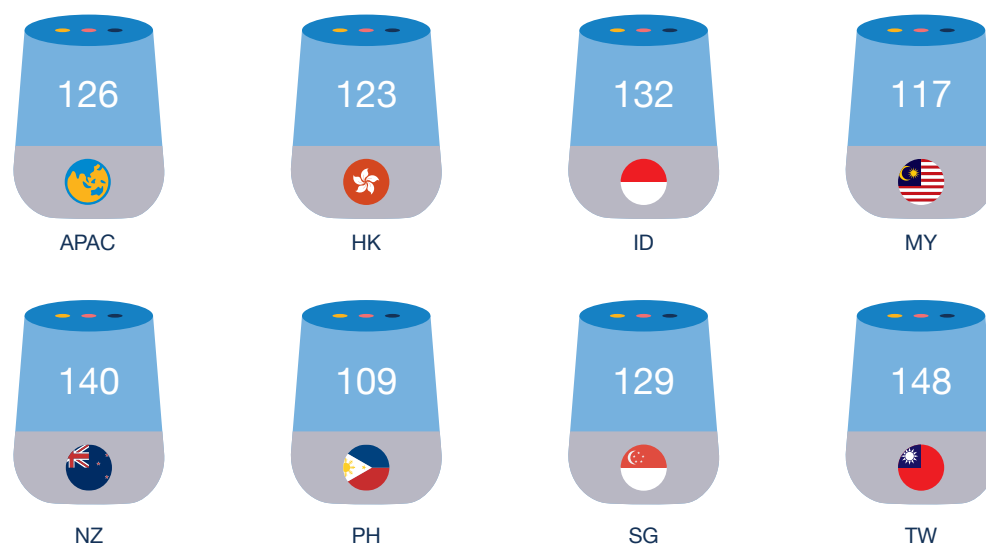


Figure 18
Index of Improve
Product or Service
vs. Provide
Advertisements

Base: 4,099 survey
respondents aged 18+
from seven countries in
Asia Pacific

Q: How acceptable is it for smart home devices to share personalised advertisements in the following areas of your home? Advertisements via smart home devices could come in the form of recommendations.

Q: How acceptable is it for smart home devices to collect information from the following area(s) of your home to improve products or services?

Note: Scores are calculated by using average score to improve product/service across rooms divided by average score to provide personalised advertisements across rooms

The pattern is consistent across markets, although we do see variations in the difference. In a market like Philippines, consumers show less sensitivity to how the device is used, while Taiwan shows the most heightened sensitivity. We have seen these findings reflected elsewhere, notably in the difference in the price premium consumers would pay for a video-on-demand service without advertisements versus one with advertisements. Taiwan would be willing to pay the largest increment not to receive advertisements while Philippines the least. Put simply, it takes greater persuasion or incentive to convince someone in Taiwan to receive advertisements versus Philippines.

The question with which we began this section is whether advertisers should capitalise on the increased opportunities for personalised advertising afforded by trends such as the move

toward connected homes. The precise answer to this question will obviously depend on the specific case, but certainly there is a need to first understand the base levels of concern over data privacy which this paper has tried to illuminate. With this understanding, determining how to utilise the data and conveying the benefits of advertising, and in particular improved advertising, is imperative. This is perfectly in line with the principles of control and trade-off described in the previous section.

Finally, we note again that the issues outlined in this section are not only relevant to connected homes. The home is certainly at the forefront today, and will continue to be so in the future, but the issues are fundamental ones which could be reapplied to out-of-home, automobiles, wearables, instore or indeed any location or data source that allow advertising to be personalised.

Optimal Price Consumers Would Pay For a VOD Service Subscription

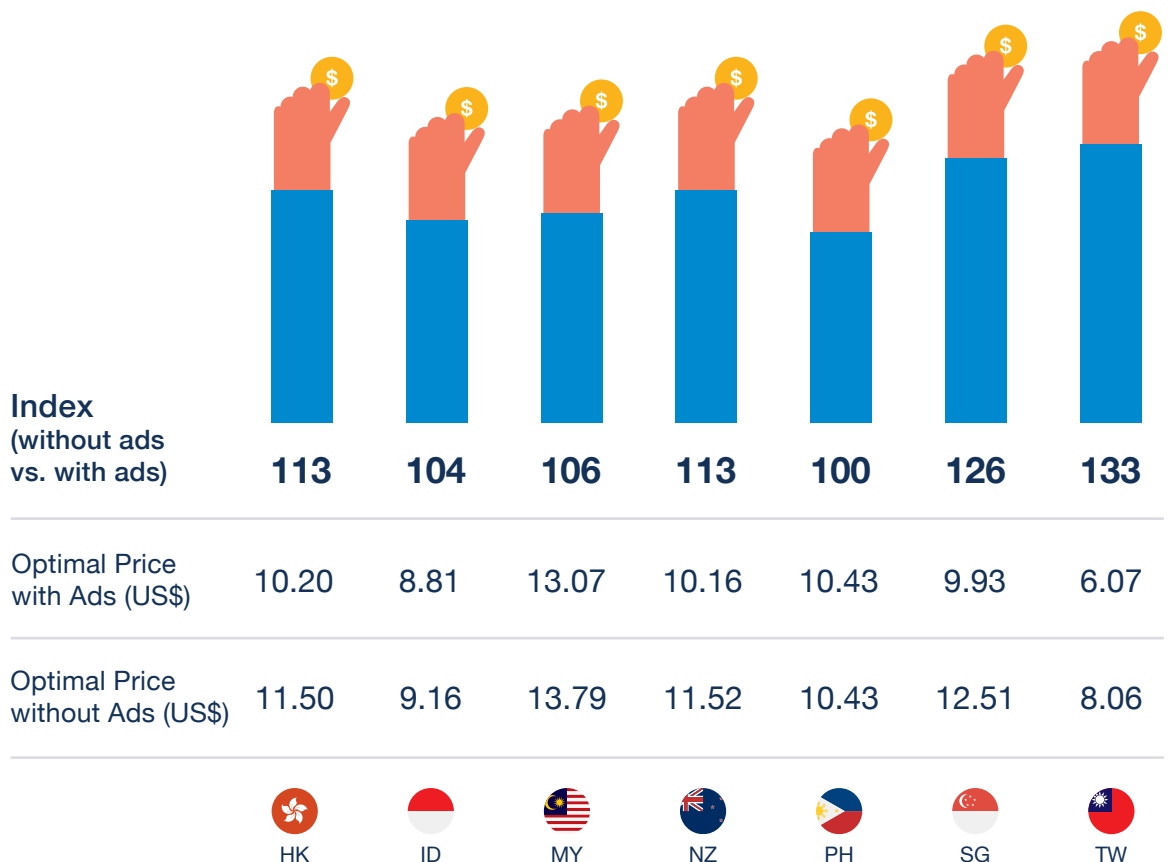


Figure 19

Base: 4,099 survey respondents aged 18+ from seven countries in Asia Pacific

Q: At what price would you consider the monthly subscription fee to be <too cheap that you would question its quality/cheap/expensive/too expensive that you would not consider subscribing>?

Note: Optimal price is modelled based on Van Westendorp's Price Sensitivity Meter

Conclusion

This paper illuminates current issues of data privacy in Asia Pacific.

We have shown the impact of data privacy on business and the need to acknowledge it. It would be wrong to assume that because you are not a “technology” brand, this does not apply to you - it does.

We have shown the extent of data privacy concern among Asia Pacific consumers and the need to listen to them. Understand that attitudes and technology vary across the region, requiring localised strategies and solutions.

We have shown how data privacy impacts product and service choices and the need to

address it through offering consumers control. If a brand is unable to gain consumers’ favour or secure consent to use their data, perhaps they need to work harder to earn it – whether that means increasing transparency, providing incentives, or building a better brand to engender more trust.

We have demonstrated the conflict of data privacy with personalised advertising and the need to know the boundaries. Legislation is coming but this is an opportunity for us to take the lead in defining what is ethical rather than exceeding the limits until the legislation arrives.

Consider this paper a call-to-action.

To learn more about our work on data privacy, the *Consumer Eye: Marketing Technology* initiative, LIVE Panel, or [m]PLATFORM, please contact GroupM at consumer.eye@groupm.com.



Checklist

While it is impossible to provide specific solutions for all organisations, we have developed a checklist of questions that companies can use as a guideline to establish a data privacy strategy. Not all points will be relevant for all organisations and each company will be at different levels of progress, but this checklist serves as a starting point.

Have you:

Plan

- Audited all your current consumer data
- Made a future focused plan for how technology will impact your business and how data privacy concerns will impinge on it
- Defined what privacy means to your staff and consumers. For example, is data privacy included as part of your company charter?
- Validated all your data privacy strategies locally
- Balanced short-term financial needs with long-term focus

Offer

- Provided sufficient options to your consumers such as non-data sharing and variety of advertising models (e.g. personalised, non-personalised, no advertising etc.)
- Provided direct benefits and incentives to consumers for sharing of their data
- Monitored consumer sensitivity to your advertisements, depending on location they are served, type of advertisement, and segmentation type
- Set up the right technology infrastructure to ensure data is secure

Communicate

- Transparently educated consumers on what data is being collected and how it is being used
- Created a brand or corporate marketing plan to leverage your data privacy strengths or abate your perceived weaknesses.
- Educated consumers on why your service is advertisement-supported
- Demonstrated to consumers the benefits of advertising, especially personalised advertisements
- Briefed your Customer Relationship Management (CRM) team to handle and respond to data privacy queries and concerns



Research Methodology

This whitepaper is a part of GroupM's **Consumer Eye: Marketing Technology** thought leadership initiative, which explores emerging media-related technologies from the perspective of consumers. This initiative seeks to envision the future and discover implications for the disruptors, the disrupted and all advertisers, which is critical as the impact of technology on marketing grows.

Toward the end of 2018, we conducted our own proprietary research to explore four emerging marketing technologies including eCommerce, mobile wallet, video-on-demand services and connected home.

With GroupM's LIVE Panel re-contact capability, we conducted an online survey among 4,099 middle-upper income consumers aged 18 or above in seven countries (Hong Kong, Indonesia, Malaysia, New Zealand, Philippines, Singapore and Taiwan). The data was also integrated with GroupM's [m]PLATFORM capability to gain additional technographic and behavioural insights of consumers.

Sample size breakdown as follows:

	Hong Kong	589
	Indonesia	588
	Malaysia	584
	New Zealand	583
	Philippines	581
	Singapore	584
	Taiwan	590

L I V E  P A N E L

[m]PLATFORM™

Author



Chris Myers
Regional Director, Insights
GroupM Asia Pacific

GroupM is the world's leading media investment company responsible for more than \$113B in annual media investment through agencies including Mindshare, MediaCom, Wavemaker, Essence and m/SIX, as well as the outcomes-driven programmatic audience company, Xaxis.

GroupM creates competitive advantage for advertisers via its worldwide organisation of media experts who deliver powerful insights on consumers and media platforms, trading expertise, market-leading brand-safe media, technology solutions, addressable TV, content, sports and more.

Discover more about GroupM at www.groupm.com.

Follow **@GroupMWorldwide** on Twitter

Follow GroupM on LinkedIn - <https://www.linkedin.com/company/groupm>



GroupM Asia Pacific Holdings Pte Ltd
18 Cross Street
#04-01 China Square Central
Singapore 048423

Part of WPP

© 2019 GroupM Asia Pacific Holdings Pte Ltd. All rights reserved.