

ESOMAR

DATA PRIVACY IN THE COVID-19 PANDEMIC: WHERE DO WE GO FROM HERE?

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ESOMAR

April 15, 2020

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WHO IS ESOMAR?

70 yrs of experience,
AND content !



130
countries



6000+
members



600+
companies



45,000+
professionals



100 local Reps



18,000+



8800+



13,500+



3,500



Instagram



YouTube



Council
PSC / LAC
Clients SB



ICC/ESOMAR
Code



Respected
Lobbying



Global and local
events



Online TV qtrly



ANA
first A.I. search engine
for market resea (2)

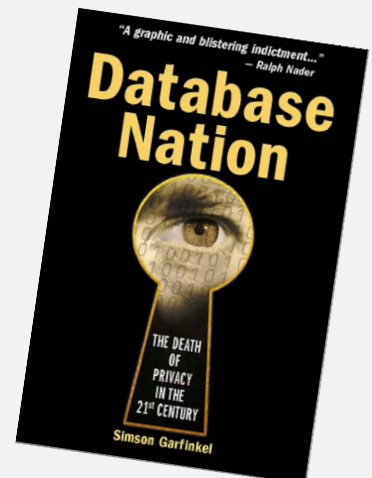
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PRIVACY IS DEAD.

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“The future we’re rushing towards isn’t one where our every move is watched and recorded by some all-knowing “Big Brother.” It is instead a future of a hundred big brothers that constantly watch and interrupt our daily lives. George Orwell thought that the Communist system represented the ultimate threat to individual liberty. Over the next 50 years, we will see new kinds of threats to privacy that don’t find their roots in totalitarianism, but in capitalism, the free market, advanced technology, and the unbridled exchange of electronic information.”

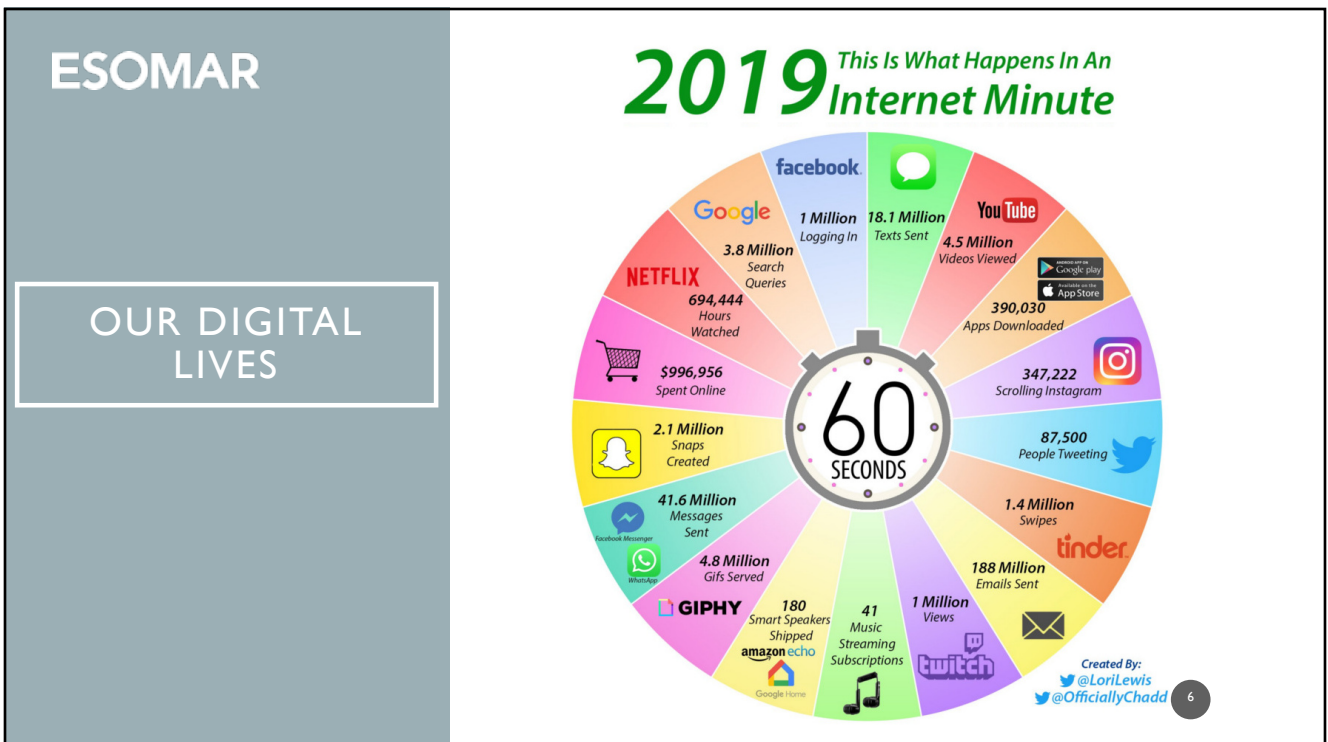


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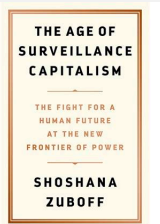
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“(...) the unilateral claiming of private human experience as free raw material for translation into behavioral data. These data are then computed and packaged as prediction products and sold into behavioral futures markets — business customers with a commercial interest in knowing what we will do now, soon, and later (...) Right from the start at Google it was understood that users were unlikely to agree to this unilateral claiming of their experience and its translation into behavioral data. It was understood that these methods had to be undetectable.”

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"On the Internet, nobody knows you're a dog."

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*"Remember when, on the Internet,
nobody knew who you were?"*

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AMERICANS ARE FED UP, OR SO THEY SAY

Percent of US adults who say ...

All or most of what they do online is tracked by companies.	72%
They are very or somewhat concerned about how their personal data is used by companies.	79%
They understand very little or nothing about what companies do with their data.	59%
They have a great deal or some control over their data.	18%
They benefit a great deal or somewhat from the data companies collect on them.	28%
The potential risks outweigh the benefits.	81%

Source: Pew Research Center, Americans and Privacy (2019)

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SPECIAL CONCERN ABOUT SOCIAL MEDIA AND ADVERTISERS

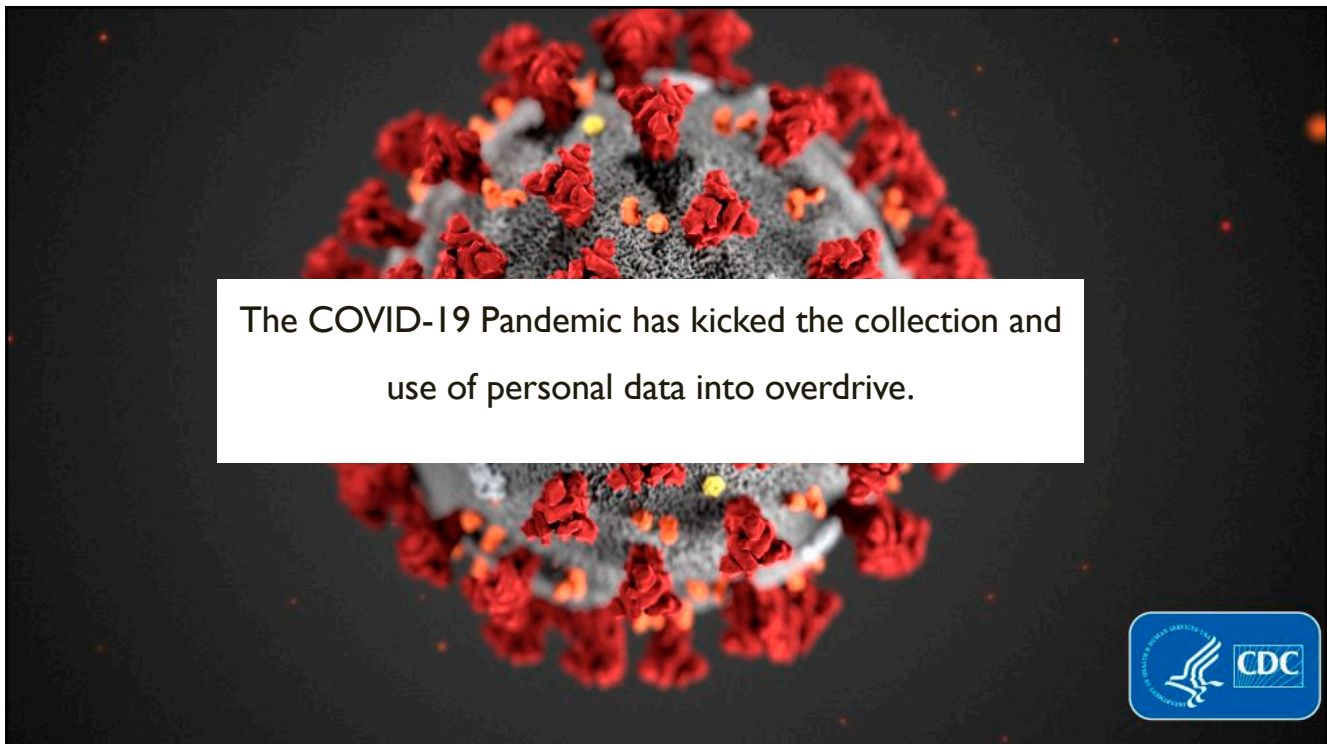
Percent of US adults concerned a little or a lot about how much personal data is held by ...

The social media sites they use	85%
Advertisers	84%
The companies they buy things from	80%
Law enforcement	61%
Their employer	58%
Their friends and family	43%

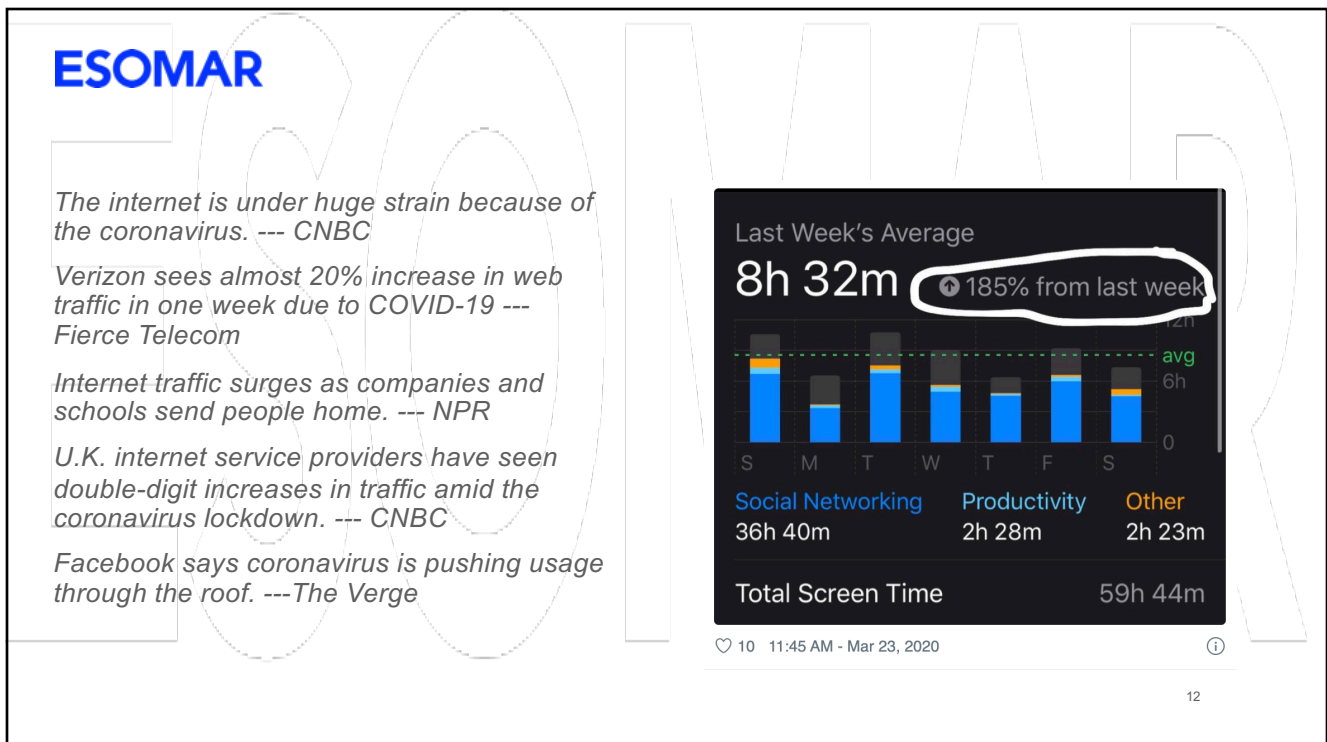
Source: Pew Research Center, Americans and Privacy (2019)

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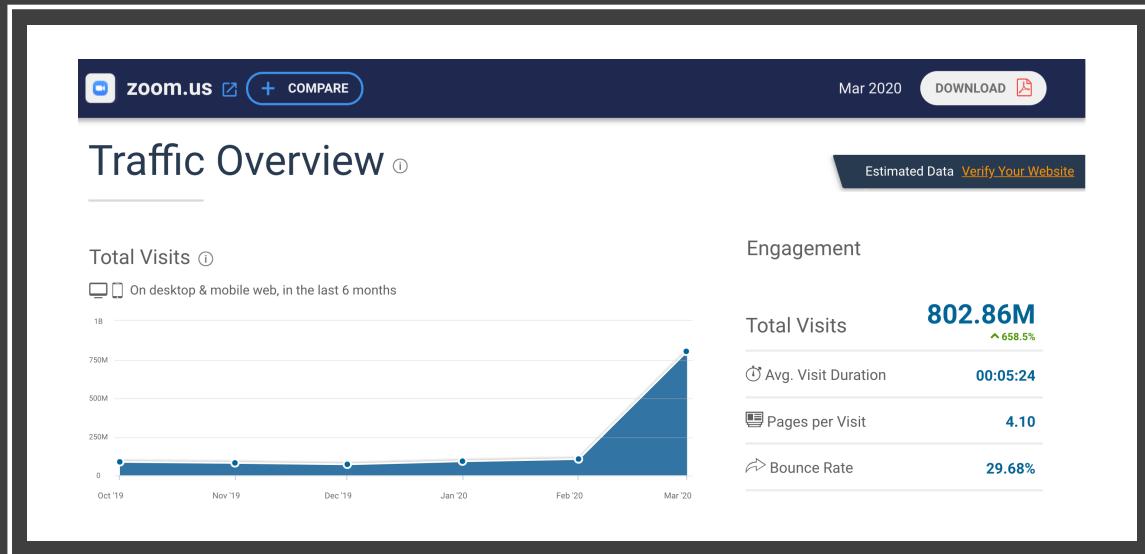


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Source: SimilarWeb.com

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MOBILE LOCATION DATA AS A SURVEILLANCE TOOL

- A willingness to trade privacy to fight the pandemic
- US, China, South Korea, Singapore, Germany, Israel, Poland, and many other countries are all in
- Mapping population movements and social distancing behavior and even enforcement
- Contact tracing when combined with credit card searches
- Tagging people based on their disease status, including apps to warn when known sufferers are nearby



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In the US, echoes of the Patriot Act passed in response to the 9/11 attacks.

“Kushner Considering Using Personal Patient Data to Create National Coronavirus Surveillance System” – National Review



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PRIVACY
RISKS ARE
MORE THAN
TARGETED
MARKETING



Loss of opportunity (e.g., in employment, access to insurance and other benefits, housing, and education)



Economic loss (e.g., granting of credit, pricing of goods and services, narrowing of choice)



Social detriment (e.g., emotional duress, public embarrassment, selective advertising)



Loss of liberty (e.g. increased surveillance, incarceration)

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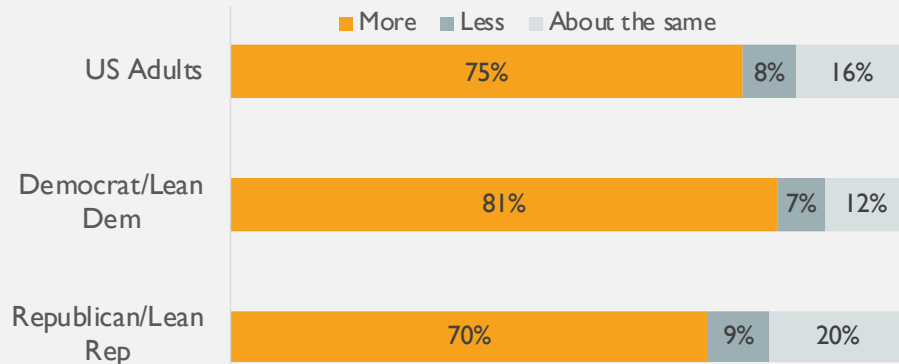
ONCE THE PANDEMIC HAS EASED HOW DO WE GET THE GENIE BACK IN THE BOTTLE?

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GENERAL SUPPORT FOR MORE REGULATION

Percent of US adults who say there should be _____ regulation of what companies can do with their customers' personal information

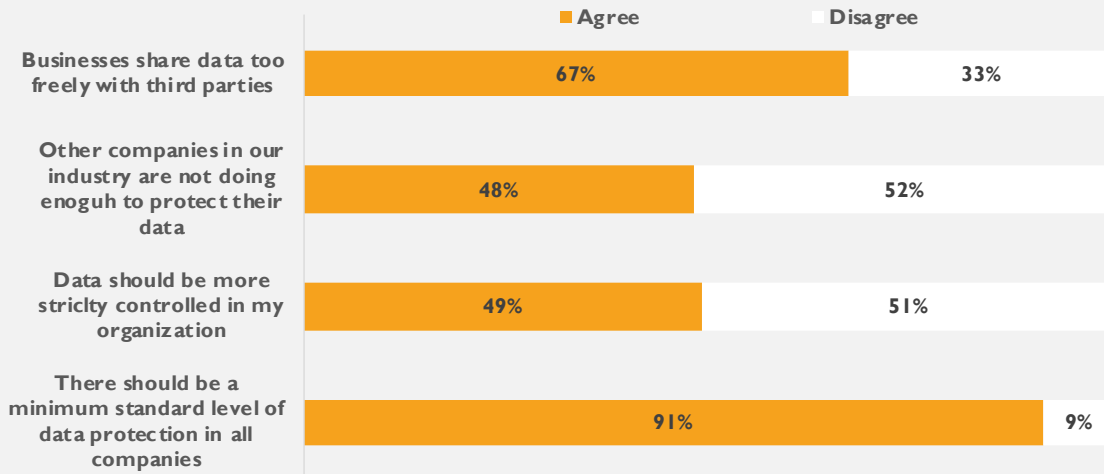


Source: Pew Research Center, Americans and Privacy (2019)

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COMPANIES ARE UNSURE ABOUT THEIR OBLIGATIONS



Source: Who Owns the Data? (ESOMAR 2019)

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LEGISLATION IS
IMPORTANT,
BUT EFFECTIVE
ENFORCEMENT
IS MORE
IMPORTANT.

“Google Is Fined \$57 Million Under Europe’s Data Privacy Law” – New York Times

“The EU could hit Facebook with billions in fines over privacy violations” – Digital Trends

“Europe’s huge privacy fines against Marriott and British Airways are a warning for Google and Facebook” – CNBC

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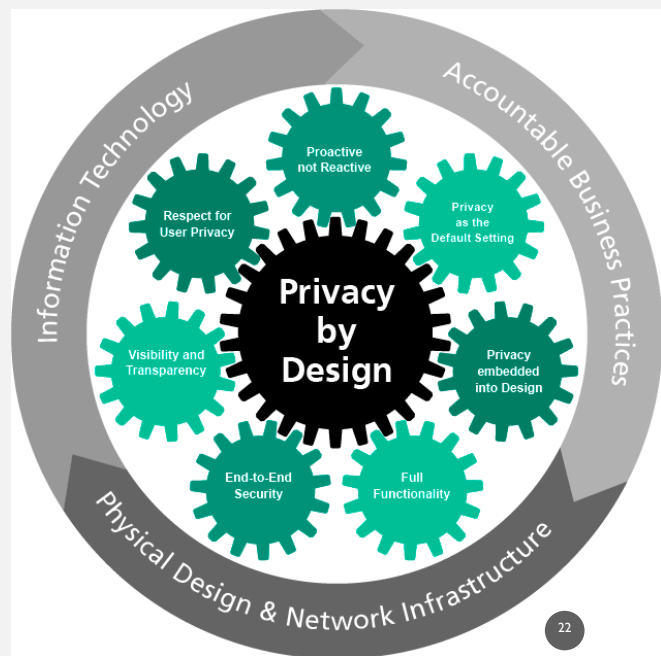
HOW DO DATA COLLECTORS—BOTH BRANDS AND MR COMPANIES—SUCCEED IN THIS ENVIRONMENT?

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OPTION A: REFRESH AND RECOMMIT TO OUR HISTORICAL VALUES

- Commit to Privacy by Design
- Be transparent about:
 - the information we collect
 - its purpose
 - with whom we share it
 - in what form.
- With big data
 - avoid dubiously-sourced
 - mitigate individual impacts



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TRANSPARENCY IS KEY

Percent of study participants who say ...

They are likely to share data if the data collector is clear about why the information is needed and how it will be used.

69%

They strongly agree that they are more likely to buy or use the services of companies that handle personal data as they should.

33%

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OPTION B: FOLLOW THE LEAD OF THE ADVERTISERS

- The allure of behavioral data
- Big data as the new paradigm
- Robust privacy practices opposed as a hindrance to doing business



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**“Research
participants
are the
lifeblood of
the research
industry.”**

FOUR THINGS WE NEED TO DO NOW

1. We need to re-establish a culture of self-regulation so that people trust us with their data.
2. We need to clearly distinguish what we do from what marketers and advertisers do.
3. Professional associations and trade bodies like ESOMAR must partner with regulators to ensure the rights of all stakeholders are protected.
4. Buyers and suppliers must support these efforts to the benefit of the industry as a whole.

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ESOMAR**THANKS FOR LISTENING**

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