PERSONAL DATA AND TRUST:
WHAT ARE THE STRATEGIES OF FRENCH CITIZEN-CONSUMERS IN 2017?

SYNTHESIS

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WITH

Mediametrie

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The Chair Values and Policies of Personal Information of Institut Mines-Télécom has joined forces with Médiamétrie to carry out a survey of how French Internet users manage their personal data. The survey, completed in March 2017, covering 2,000 people representative of French Web users, was carried out at a time when the degree of trust placed in the Internet is gradually being undermined, in view of abusive data collection practices, and the surveillance put in place by certain states or private sector companies.

Trust is crucial for people to live together harmoniously in society, and for the development of the digital economy, which needs to gather data from Web users. It is thus necessary to determine the extent to which Web users are prepared to share their data, and with whom. In addition, there is another question: do individuals just passively accept the practices of the major Internet players, or do they, on the contrary, react by developing new behaviours, particularly by using protection tools such as browser extensions that block advertisements and prevent the collection of their personal data? What is the impact of these new personal data management behaviours on the way people express themselves online, search for information and buy products?

This document provides key findings and insights into the survey which consisted of more than 50 questions overall, and is an initial attempt to analyse a complex social question: what do we mean by trust in a digital context?

Survey methodology

A sample of 2,051 Web users aged 15 and over, representative of the Internet population, were asked questions by means of a self-administered online questionnaire over the period 26 February to 16 March 2017. The representativeness of the sample was ensured by the quota method (gender, age group (5 groups), socio-professional category (5 categories) and region (Paris region/other regions)), established by referring to the authoritative survey of the Web user population in France: Observatoire des Usages de l'Internet.

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1. USERS ARE PAYING INCREASING ATTENTION TO THE CIRCULATION OF THEIR PERSONAL DATA

More than half of Web users say they are now more vigilant when using the Internet than they were a few years ago. The reasons they give for this are primarily the exposure of the private life of certain individuals on social media, and the reporting in the media of thefts of personal data.

54% of Web users <u>are more vigilant</u> when on the Internet than they were a few years ago

46% of Web users are <u>no more vigilant</u> when on the Internet than they were a few years ago

Above all, Web users differentiate between the contexts in which their data circulate (cf. the concept of "privacy in context" developed by Helen Nissenbaum and referred to in *Digital Identities*, Handbook n°1 of the Values and Policies of Personal Information Chair (2017). Tastes and interests, and in fact browsing habits, are basically seen as data that can be shared with social media. Conversely, data included in an identity document are only shared with official state websites.

	Social media	A bank	State websites	Online purchasing websites	IAP or mobile phone operator
Surname, first name	36%	80%	79%	63%	73%
Contact details	10%	75%	74%	52%	66%
Identity document	2%	56%	65%	6%	20%
Bank account details	2%	72%	48%	24%	32%
Health information	3%	7%	39%	2%	3%
Tastes and interests	42%	9%	9%	28%	13%
Geolocation	16%	14%	17%	11%	18%
Web browsing habits	11%	5%	7%	14%	16%
Internet purchases	6%	16%	5%	36%	8%
List of friends or contacts	30%	4%	4%	4%	6%
Messages, pictures, videos posted on the Internet	38%	4%	5%	6%	7%
No information	38%	14%	14%	24%	19%
ST At least one item of information	62%	86%	86%	76%	81%

▸ Question: If you could choose, to which of the following would you be prepared to give this information?
▸ Base : Web users aged 15 and over (n=2,051)

Against this background, another more recent trend is now emerging: 38% of Web users no longer wish to share their data with social media, for example, and 10% of them would prefer to provide no data whatsoever, if they had the choice.

10% of Web users would like, if they had the choice, to give no information to any actor

Amongst this 10%...

To reduce the risk of data theft, fraud or identity usurpation	34%
Because of fears that the data could be used or exploited without my agreement	23%
I do not trust the actors present on the Internet (e.g. the state, banks, social media, etc.)	16%
So as to leave no traces of my activities on the Internet	16%
So that I do not receive commercial offers	ns
Other	ns

▶Question: What is the main reason why you do not wish to provide any information?
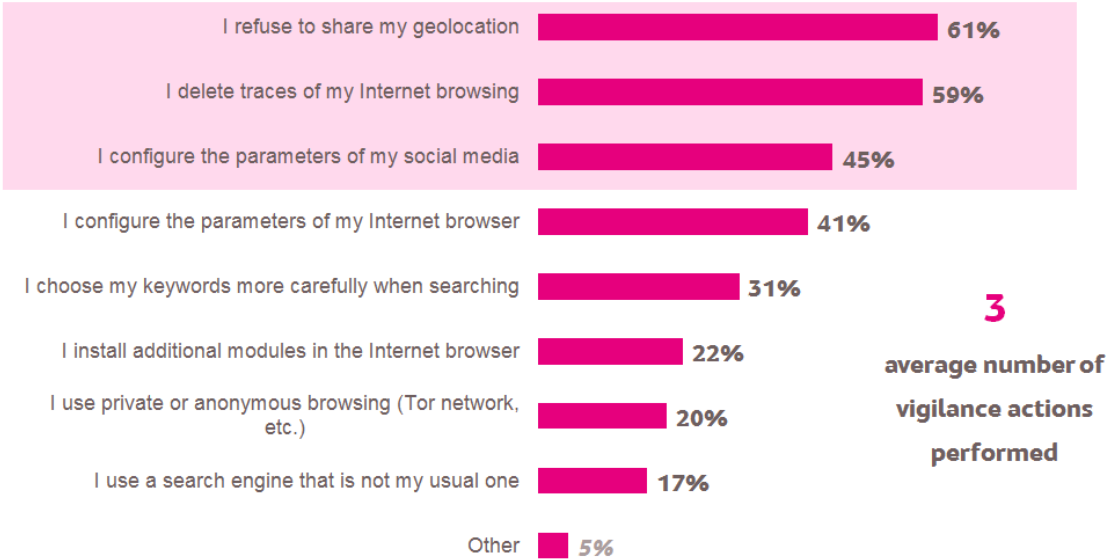▶Base: Web users aged 15 and over (n=2,051)

2. USERS WHO ARE DEVELOPING PROTECTION STRATEGIES

Our survey has confirmed a growing trend: Terms of Services (TOS) no longer inspire confidence amongst Web users. The survey shows that 89% of Web users do not read, or do not read in full, the information provided about confidentiality policies. They consider that the TOS are too long (80%), are not modular (54%) and are unclear (42%).

As users are aware of the risks associated with the circulation of their data, and as they are less confident about the ways their data is handled, they are adopting strategies to protect themselves.

Web users' increased vigilance is reflected primarily in the **parameterising of accounts**; this mainly involves the deactivation of geolocation, the deletion of navigation history on Internet browsers and the parameterising of accounts on social media.
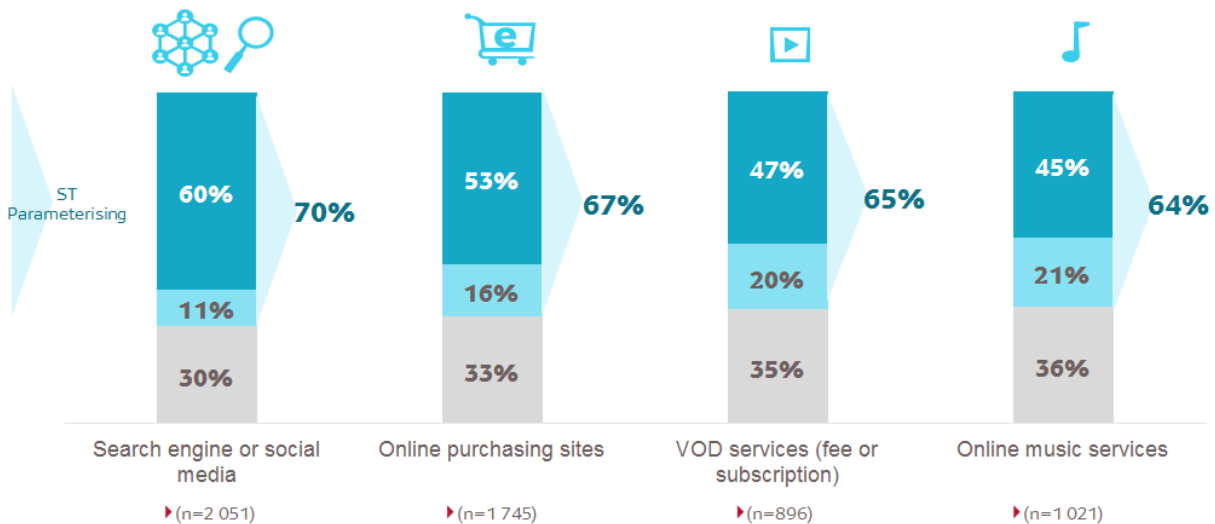
54% of Web users are <u>more vigilant</u> when on the Internet than they were a few years ago. Amongst this 54%...

I refuse to share my geolocation	61%
I delete traces of my Internet browsing	59%
I configure the parameters of my social media	45%
I configure the parameters of my Internet browser	41%
I choose my keywords more carefully when searching	31%
I install additional modules in the Internet browser	22%
I use private or anonymous browsing (Tor network, etc.)	20%
I use a search engine that is not my usual one	17%
Other	5%

3
average number of vigilance actions performed

▶Question: In what ways are you more vigilant?
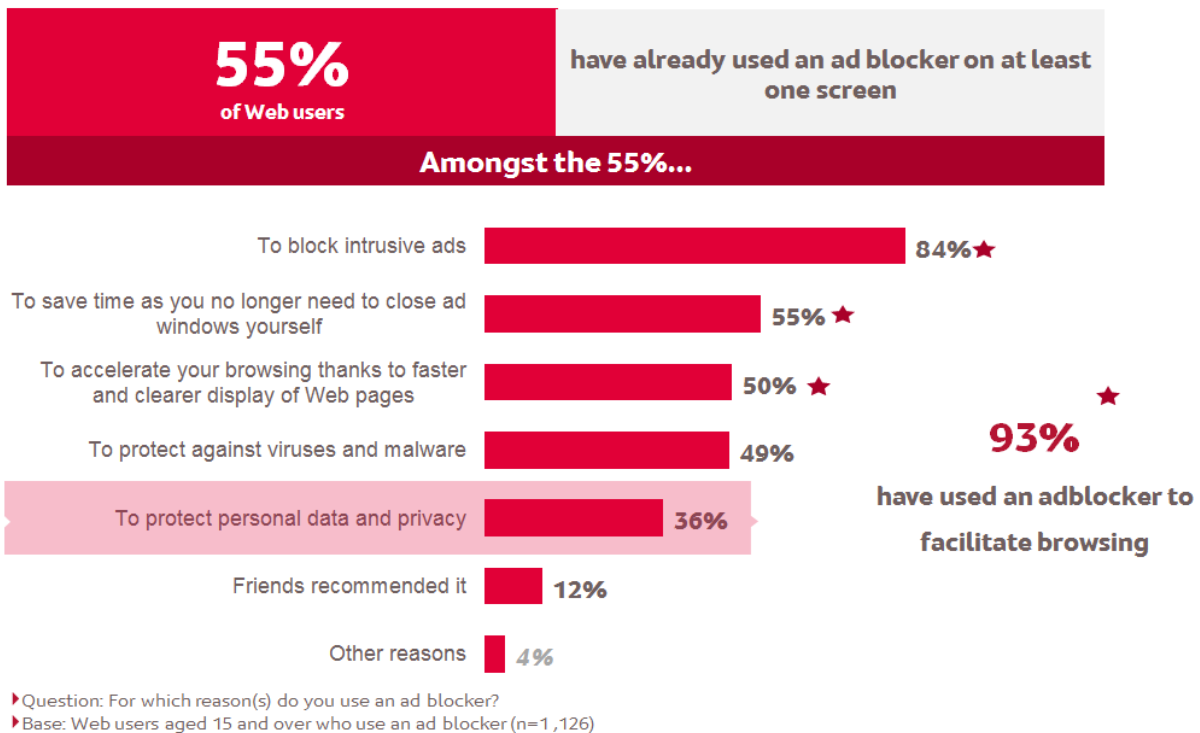▶Base: Web users aged 15 and over (n=2,051)

The primary objective is to reduce the number of data items collected, and not to improve the quality of personalised recommendations.

■ To limit the collected information
■ To recieve recommendations that better suit my taste
■ I do not set the privacy and preferences settings of my accounts for this type of service

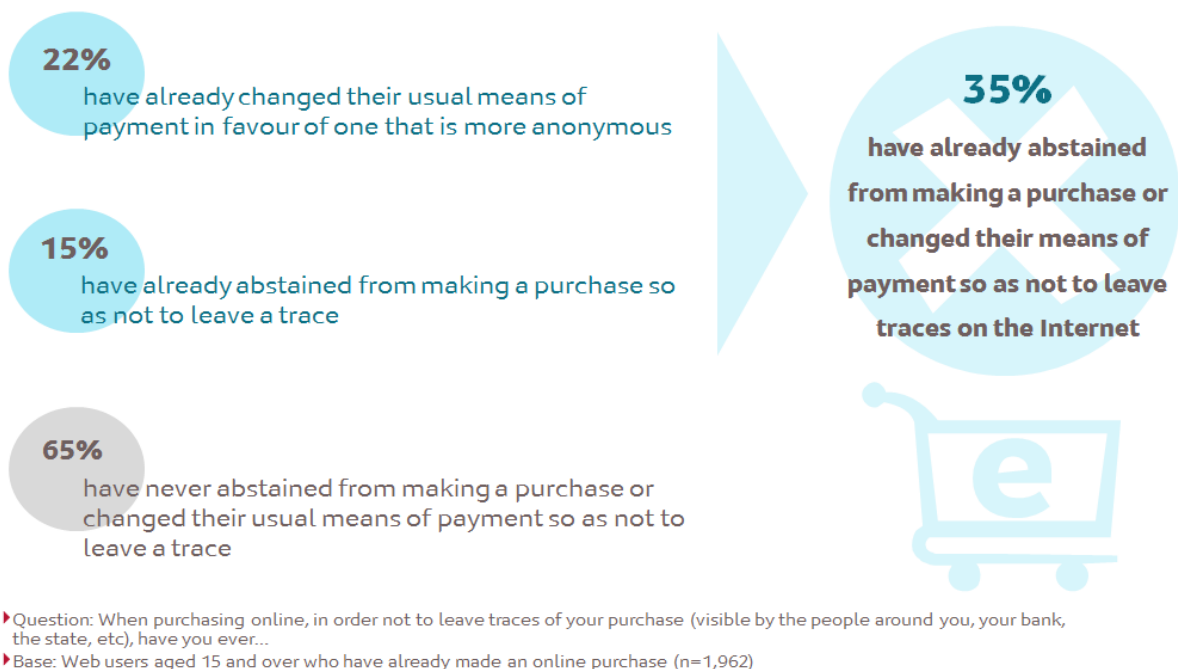| ST Parameterising	Search engine or social media	Online purchasing sites	VOD services (fee or subscription)	Online music services
Total	70%	67%	65%	64%
To limit the collected information	60%	53%	47%	45%
To recieve recommendations	11%	16%	20%	21%
I do not set	30%	33%	35%	36%
	(n=2 051)	(n=1 745)	(n=896)	(n=1 021)

▶Question: For which reasons do you adjust the confidentiality and preference parameters of your Internet accounts?
▶Base: Web users aged 15 and over who use each of the services (n=2 051)

The use of an ad blocker is largely motivated by a refusal to accept intrusive advertising. In addition, more than one-third of persons questioned say they use an ad blocker as a way of protecting their personal information and their privacy.

55% of Web users — have already used an ad blocker on at least one screen

Amongst the 55%...

To block intrusive ads	84% ★
To save time as you no longer need to close ad windows yourself	55% ★
To accelerate your browsing thanks to faster and clearer display of Web pages	50% ★
To protect against viruses and malware	49%
To protect personal data and privacy	36%
Friends recommended it	12%
Other reasons	4%

★ **93%** have used an adblocker to facilitate browsing

▶ Question: For which reason(s) do you use an ad blocker?
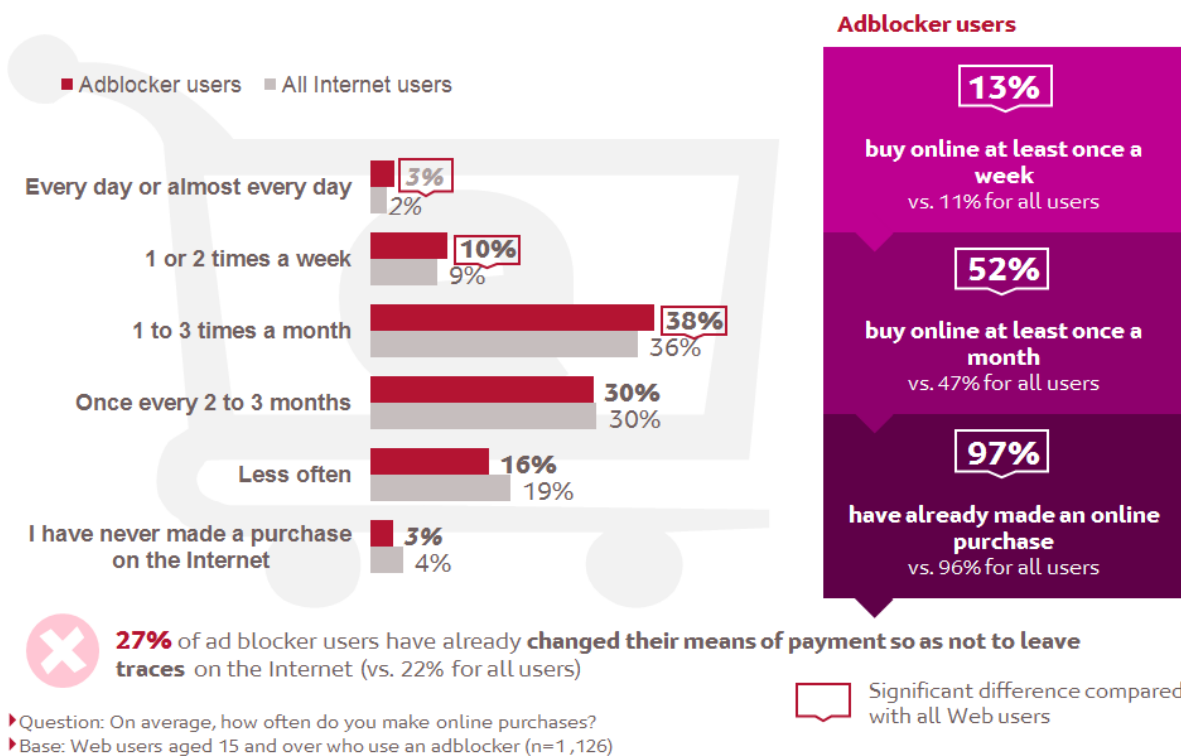▶ Base: Web users aged 15 and over who use an ad blocker (n=1,126)

Finally a **change in purchasing behaviour in order to protect the individual's data** can be observed. **Abstaining from a purchase** or changing a payment instrument in order not to leave traces are two practices adopted by more than one-third of Web users when buying online.

22% have already changed their usual means of payment in favour of one that is more anonymous

15% have already abstained from making a purchase so as not to leave a trace

65% have never abstained from making a purchase or changed their usual means of payment so as not to leave a trace

35% have already abstained from making a purchase or changed their means of payment so as not to leave traces on the Internet

▶ Question: When purchasing online, in order not to leave traces of your purchase (visible by the people around you, your bank, the state, etc), have you ever...
▶ Base: Web users aged 15 and over who have already made an online purchase (n=1,962)

3. PROTECTION IS NOT DETRIMNETAL TO ONLINE PURCHASEES

We have found that a significant proportion of Web users adopt personal data protection strategies, while a growing proportion seem to reject any form of sharing of their personal data. What could be the socioeconomic impact of these personal data protection strategies? **We have found that those who use protection tools purchase on average more than those who do not use protection tools: behaviour intended to protect oneself could be seen assynonymous with involvement in the digital economy.**

■ Adblocker users ■ All Internet users

	Adblocker users	All Internet users
Every day or almost every day	3%	2%
1 or 2 times a week	10%	9%
1 to 3 times a month	38%	36%
Once every 2 to 3 months	30%	30%
Less often	16%	19%
I have never made a purchase on the Internet	3%	4%

Adblocker users

13%
buy online at least once a week
vs. 11% for all users

52%
buy online at least once a month
vs. 47% for all users

97%
have already made an online purchase
vs. 96% for all users

27% of ad blocker users have already **changed their means of payment so as not to leave traces** on the Internet (vs. 22% for all users)

☐ Significant difference compared with all Web users

▸ Question: On average, how often do you make online purchases?
▸ Base: Web users aged 15 and over who use an adblocker (n=1,126)

4. ECONOMIC AND SOCIETAL OUTLOOK

The survey shows that economic and social issues linked to the use of personal data are interrelated in a complex way.

From an economics point of view, behaviours reflecting an outright refusal to share personal data constitute a risk that cannot be ignored for the new economy fuelled by data sharing. But in fact individual protection strategies (management of digital identities, management of payment instruments, ad blockers, parameterising of accounts) do not in any way act as a brake on economic exchanges: for example, the widespread use of ad blockers, seen by some advertisers as a threat, is in fact accompanied by an increase in online purchasing by the individuals concerned. **Giving people a means of protecting themselves could strengthen their subjective feeling of individual empowerment**.

From a social point of view, other complementary paths of exploration should be mentioned. Although Web users are now more vigilant, and tend to increasingly protect themselves (or are arguably forced to take their protection into their own hands), they are also extremely suspicious about the way their relationships with digital service providers are managed, as illustrated by their perceptions of Terms of Services. Are constant solicitation or advice to "be vigilant" really the first things that consumers are looking for?

To attempt to answer this question, we asked the Web users taking part in the survey to choose 3 unrestricted words to describe what the concept of trust meant to them. The results are shown in the word cloud opposite (after a lexical grouping by categories of words). The two terms most frequently encountered are *security* and *respect*, followed closely by *transparency*. While *security* is no surprise, and while *transparency* seems to suggest a wish to see actors' practices move towards more reciprocity in the "balance of power" governing the use of the data collected, *respect* seems to indicate Web users' aspiration that their privacy should be respected without them having to devote constantly growing efforts to defending it.

We see here the presence of a crucial component of trust: respect seems indeed to indicate **a type of social relationship that cannot be reduced merely to the execution of a contractual relationship**. With this in mind, much more clearly needs to be done to ensure that the new digital economy does not lead to an impulse of rejection across society as a whole.

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