Building for Trust.
A Cross-Ecosystem Approach

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My Data 2016
Global reach & member diversity
Championing Consumer Trust

Lack of Trust Hampering Apps Downloads: MEF Global Consumer Trust Report 2015 - Impulse Gamer

Consumers still fear buy online: BRAZIL

Flashlight apps, location and why consumers still don’t understand privacy
MEF
GLOBAL CONSUMER TRUST REPORT 2016
UNDERSTANDING THE IMPACT OF GLOBAL ATTITUDES TOWARDS DATA PRIVACY AND SECURITY IN THE MOBILE ECOSYSTEM
A lack of trust remains the single biggest barrier to growth

- Trust-related: 36%
- Too expensive: 10%
- Network too slow: 12%
- No need: 8%
- Other: 13%
- I don't limit my app usage: 21%
WHAT IS THE MAIN REASON YOU DON’T DOWNLOAD AND/OR USE MORE MOBILE APPS AND SERVICES?

- **NET TRUST:**
  - Global Total: 36%
  - United Kingdom: 13%
  - United States: 13%
  - Brazil: 15%
  - France: 17%
  - Germany: 15%
  - China: 19%
  - India: 14%
  - South Africa: 13%

- **I DON’T WANT TO SHARE PERSONAL INFORMATION LIKE MY LOCATION OR BROWSING HISTORY:**
  - Global Total: 4%
  - United Kingdom: 4%
  - United States: 4%
  - Brazil: 5%
  - France: 4%
  - Germany: 4%
  - China: 5%
  - India: 4%
  - South Africa: 9%

- **I’VE READ OR HEARD NEGATIVE NEWS STORIES IN THE MEDIA:**
  - Global Total: 3%
  - United Kingdom: 11%
  - United States: 13%
  - Brazil: 10%
  - France: 13%
  - Germany: 14%
  - China: 12%
  - India: 14%

- **I HAD A PREVIOUS BAD EXPERIENCE:**
  - Global Total: 4%
  - United Kingdom: 4%
  - United States: 4%
  - Brazil: 4%
  - France: 4%
  - Germany: 4%
  - China: 4%
  - India: 4%

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The rise of the reluctant sharer

TO WHAT EXTENT DOES A LACK OF TRUST PREVENT YOU FROM BUYING, DOWNLOADING OR USING SOME OR ALL APPS IN YOUR PHONE?

COMPLETELY PREVENTS ME

33% GLOBAL 2014

ARE YOU HAPPY SHARING YOUR PERSONAL INFORMATION WHEN YOU USE AN APP?

NO, BUT IF I WANT TO USE THE APP I DON'T HAVE ANY CHOICE

14% GLOBAL 2015

41% GLOBAL 2015
Only one in sixteen consumers are happy to share data

- No, and I never do (41%)
- No, but if I want to use the app I don’t have any choice (15%)
- Yes, but only if I get something in return i.e. the app is discounted (6%)
- Yes, I am always happy to share my personal information (38%)
Social networks the least trusted

WHAT TYPE OF APPS DO YOU TRUST THE LEAST?

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Networking</td>
<td>39%</td>
</tr>
<tr>
<td>Games</td>
<td>27%</td>
</tr>
<tr>
<td>Business &amp; Finance</td>
<td>25%</td>
</tr>
<tr>
<td>Photo &amp; Video</td>
<td>20%</td>
</tr>
<tr>
<td>Lifestyle &amp; Entertainment</td>
<td>16%</td>
</tr>
<tr>
<td>Navigation &amp; Travel</td>
<td>15%</td>
</tr>
<tr>
<td>Medical</td>
<td>14%</td>
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<tr>
<td>Music</td>
<td>13%</td>
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<tr>
<td>Reference</td>
<td>12%</td>
</tr>
<tr>
<td>Health &amp; Fitness</td>
<td>12%</td>
</tr>
<tr>
<td>Utilities</td>
<td>12%</td>
</tr>
</tbody>
</table>
SMS the most trusted messaging platform

- SMS: 35%
- Messaging app e.g. WhatsApp, Instagram etc.: 28%
- Facebook, Yahoo Messenger or Skype: 18%
- Push notification direct to the company’s app: 16%
- Other: 4%
OF THE TYPES OF DATA COLLECTED BY A WEARABLE DEVICE, WHICH ARE OF MOST CONCERN TO YOU?

- Photos & Videos: 51%
- Location: 43%
- Health: 24%
- Sleep: 18%
- Fitness: 15%
- Other: 2%
HOW DO WE BUILD TRUST IN THE PLATFORM ECONOMY?
New economies driven by data

PLATFORM ECONOMY

PERSONAL DATA ECONOMY

Health  Finance  Transport  Food  Retail
Personal Data Ecosystem

- Businesses holding personal data
- Businesses using personal data
- Platform players
- Government / regulatory bodies
Challenges Ahead

- Diverse regulation
- Tools & technology
- Identifying the right business models
- Creating mass-consumer demand
Cross-Ecosystem Approach

Data-driven economies

- Consumer Privacy advocates
- Service Design companies
- Gov. / Regulatory authorities
- Academics
- Market research companies
- Legal/law companies
- Trade associations
- Personal Data Buyers
- Personal Data Holders e.g. MNOs, Banks, Health etc
- Technology developers & providers

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The advent of the ‘Willing Sharer’?
ACCELERATING YOUR MOBILE OPPORTUNITY

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