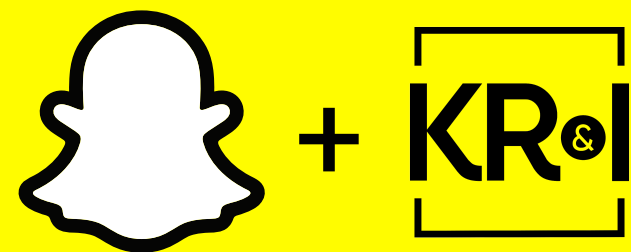
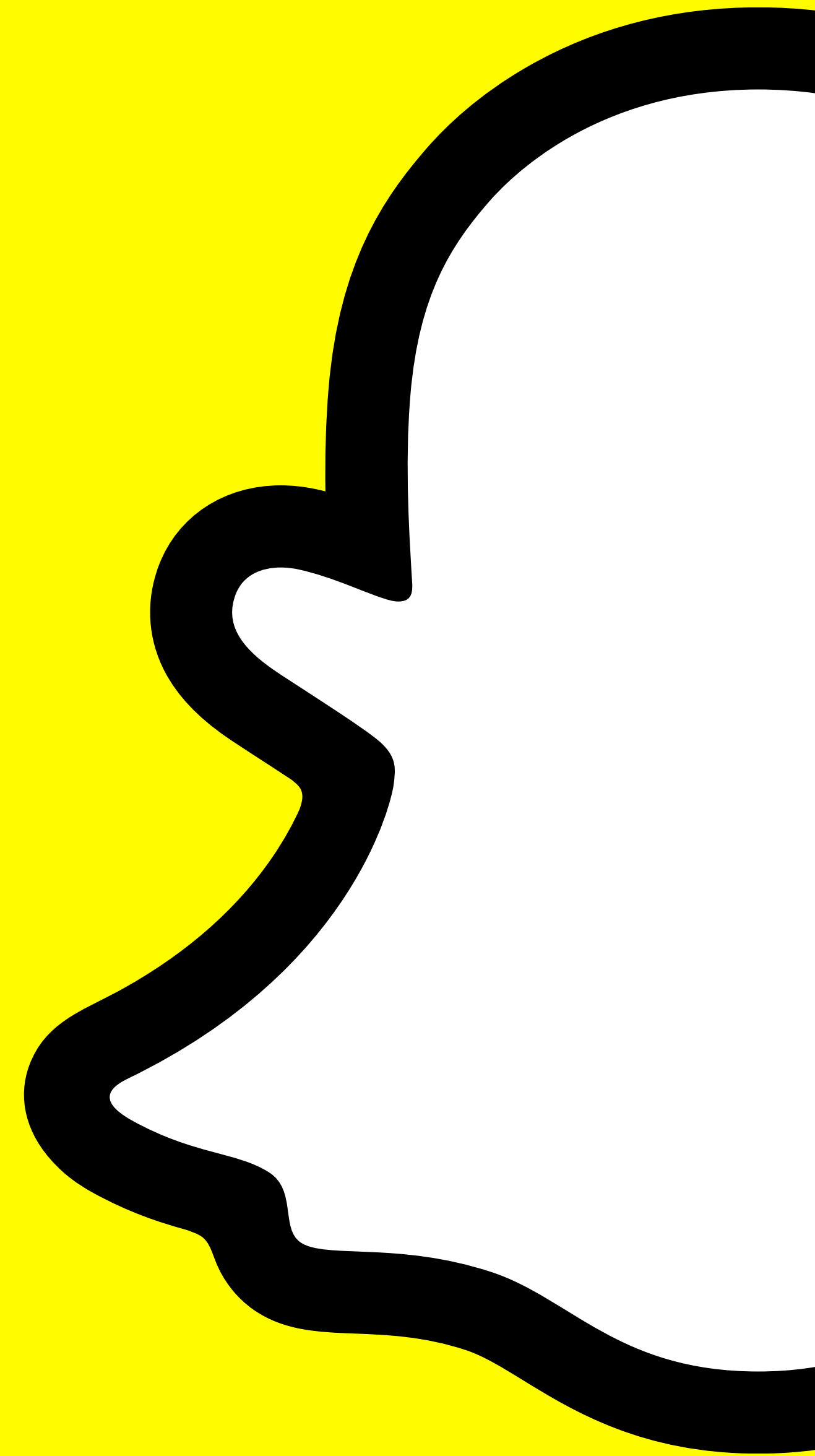


Global Perceptions of Privacy

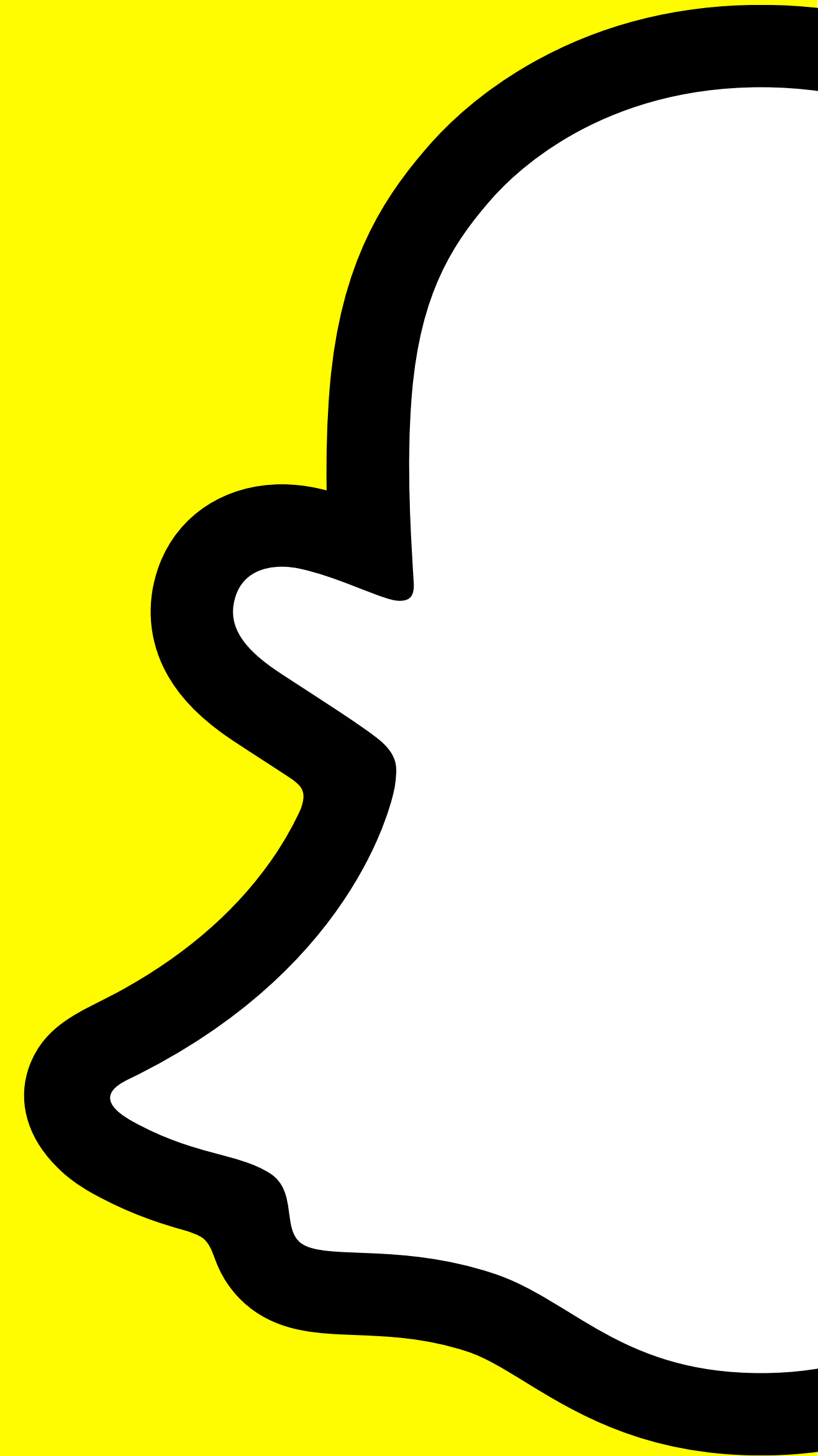
Research Report



January 2022



Objectives & Methodology





Objectives

To understand...

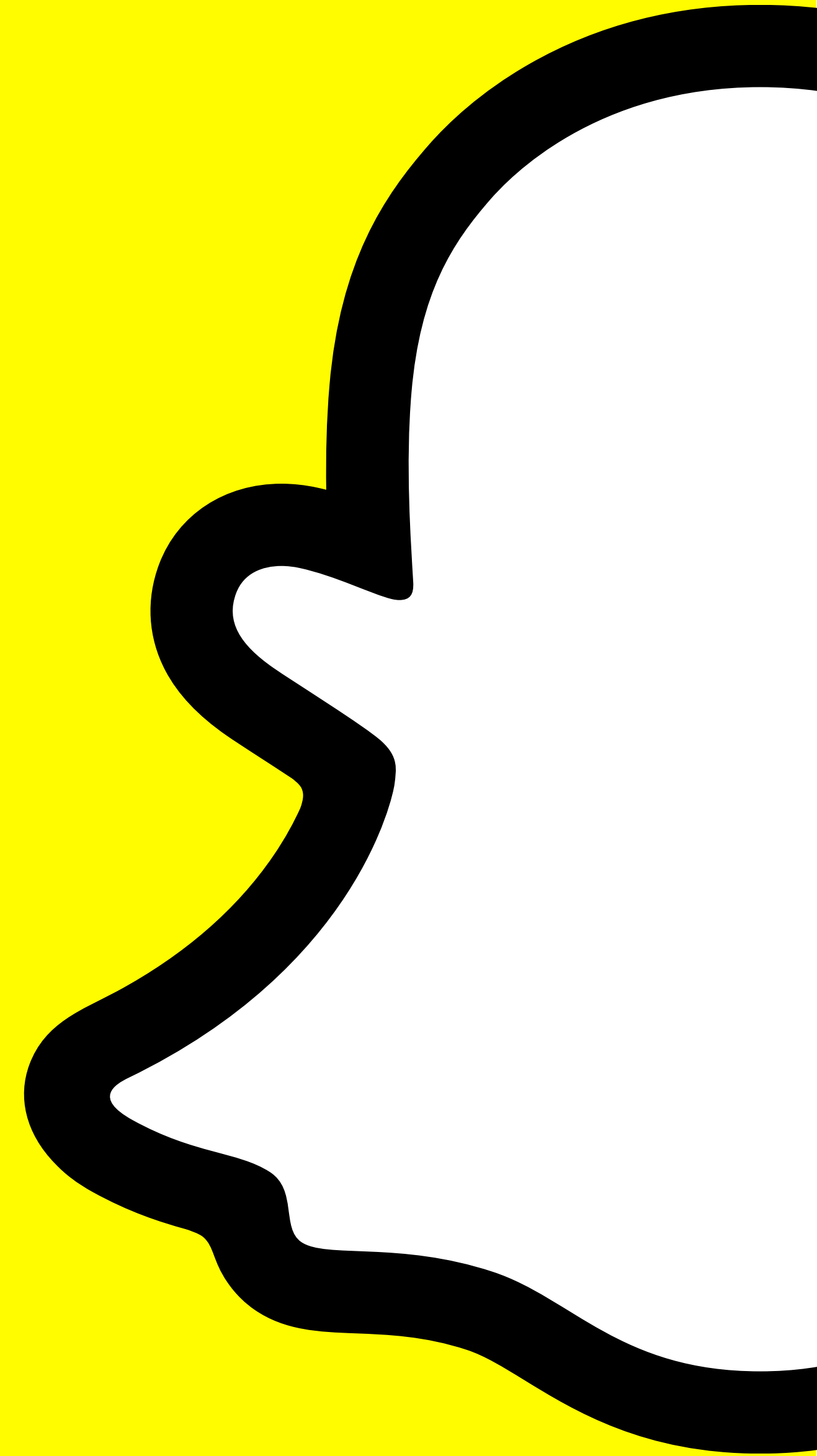
- the underlying needs associated with privacy and how those needs shape online behavior.
- consumers' concerns about and responses to online privacy risks.
- consumers' perceptions of privacy benefits and risks on online platforms
- how consumers' privacy needs shape perception and engagement with Snapchat and key competitors.
- how consumers' privacy needs, attitudes, and perceptions of social apps' privacy benefits and risks vary:
 - among Snapchatters vs. Non-Snapchatters
 - by generation

*Darhl M. Pedersen, Psychological Functions of Privacy, Journal of Environmental Psychology, Volume 17, Issue 2, 1997

**Exploratory factor analysis was used to determine statistically which response options were most related to one another to create three benefits of privacy sub scales.

Q10. Privacy can offer a variety of benefits and take many forms (from being alone, to feeling anonymous in a crowd or online space, to keeping your thoughts and feelings to yourself...; International Total Sample = 13,519

Findings





Methodology



Literature Review

- Focused review of academic literature, publicly available research, analysis published by think tanks and non-profit organizations, non-public sources, and popular media resources



Expert Interviews

- Six 45-minute interviews with privacy scholars and consultants



Quantitative Survey

- ~20 minute survey
- N = 13,519 daily social/communication app users
- International sample
 - Australia, Canada, France, Germany, Netherlands, Norway, Saudia Arabia, Sweden, UAE, UK, USA
 - Minimum of 500 Snapchatters (use Snapchat daily) and 500 Non-Snapchatters (never use Snapchat, but use another social/communication app daily) per market
- Ages 13-40
 - Minimum of 200 13-17-year-olds per market
- Analyses included: Group differences, Exploratory Factor Analyses, Segmentation, Correlations

UNDERSTANDING SAMPLE COMPOSITION

The sampling strategy ensured sufficient sample to meet study objectives for comparing Snapchatters vs. Non-Snapchatters and users in different age groups. Within each of these groups, the sample was nationally representative of the online population. In order to preserve comparative distinctions, the data was not weighted for analysis.

WHY 7-POINT SCALES?

Throughout the survey, 7-point scales were used to provide greater resolution regarding respondents' perceptions. "Seven-point Likert items have been shown to be more accurate, easier to use, and a better reflection of a respondent's true evaluation."*

*Craig Finstad, Response Interpolation and Scale Sensitivity: Evidence Against 5-Point Scales, Journal of Usability Studies, Volume 5, Issue 3, 2010

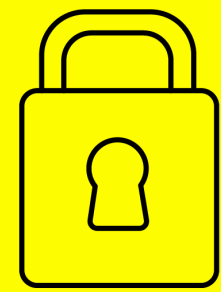
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Executive Summary



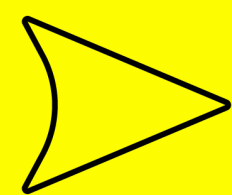
Our current conversation about online privacy is problematically narrow. We focus too much on threats to personal information, which obscures how users find and benefit from privacy online.



Privacy is associated with three types of psychological benefits: relaxation, self-awareness/ expression, and avoiding social judgment.



Currently, users consider online privacy important, but aren't highly satisfied with how much they have.

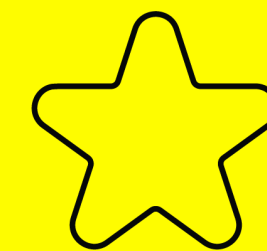


What users share online – and with whom – is shaped by a mix of privacy concerns and a desire to reap social-emotional benefits.



Users care more about social app features that increase their control over what and with whom they share than about privacy policies.

- Privacy's benefits seem more likely to emerge when apps strengthen close personal relationships, suppress anti-social behavior, and give users a sense of control over the content they create.



Snapchatters have distinct privacy profiles; compared to Non-Snapchatters, they are:

- more attuned to the benefits that privacy affords
- more satisfied with their online privacy
- more comfortable sharing all types of personal information



Privacy is layered and complex.

A brief history of online privacy behavior:



Privacy Calculus Theory

Culnan and Armstrong, 1999

Idea: People consciously determine that the benefits of sharing information online outweigh the risks.

Ex: Providing email addresses in order to get discounts despite risks of data being sold to third parties.

The Privacy Paradox

Barnes, 2006

Idea: People don't always act in their best interests when sharing online.

Ex: Creating social app accounts and posting personal information despite not trusting companies to protect data.

Networked Privacy

Marwick and boyd, 2014

Idea: People are increasingly interconnected online and must navigate various social relationships and privacy norms in order to determine when and how to share personal information.

Ex: Teens protecting their digital privacy from parental oversight by using insider terms and references their parents won't understand.

Yet, privacy is neither 'paradoxical' nor 'calculated' because people cannot actually understand the risks of their online behavior.

Culnan, M. J., and Armstrong, P. K. Information privacy concerns, procedural fairness, and impersonal trust: an empirical investigation. *Organ. Sci.* 10. (1999).

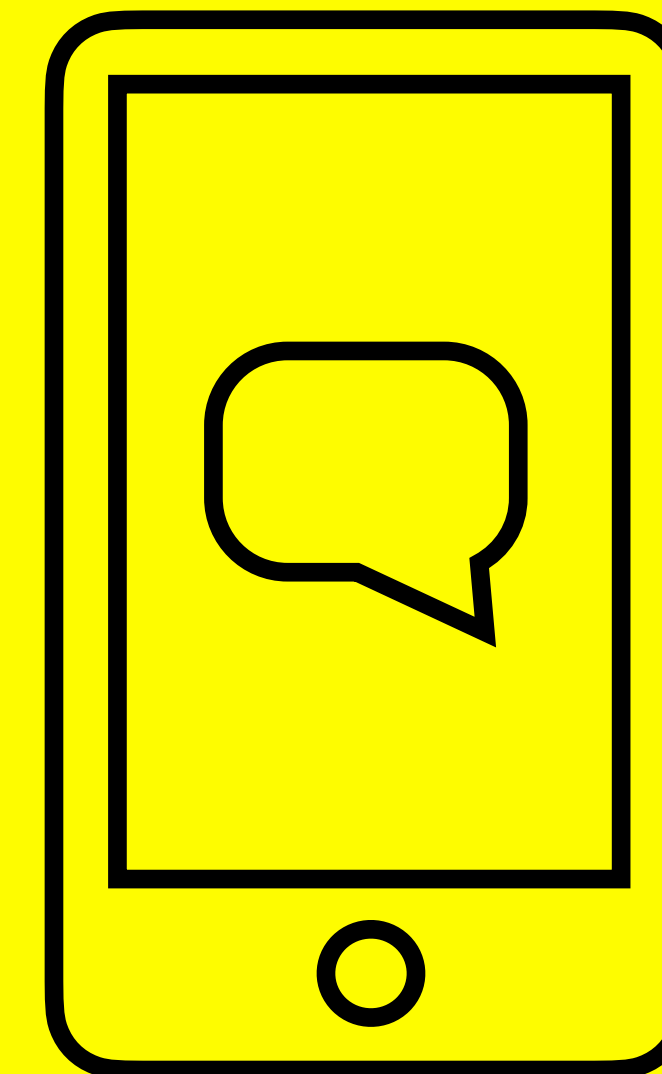
Barnes, Susan B. "A privacy paradox: Social networking in the United States." *First Monday* (2006).

Marwick, Alice E., and danah boyd. "Networked Privacy: How Teenagers Negotiate Context in Social Media." *New Media & Society*, vol. 16, no. 7, Nov. 2014.



The current conversation about online privacy focuses almost exclusively on threats to personal information and fails to consider how users find, experience, and derive benefits from privacy online.

“One of the reasons that privacy protections are constantly failing is because the term ‘privacy’ doesn’t really work to capture all these things that we want it to protect.”
– Alice Marwick, Privacy Scholar



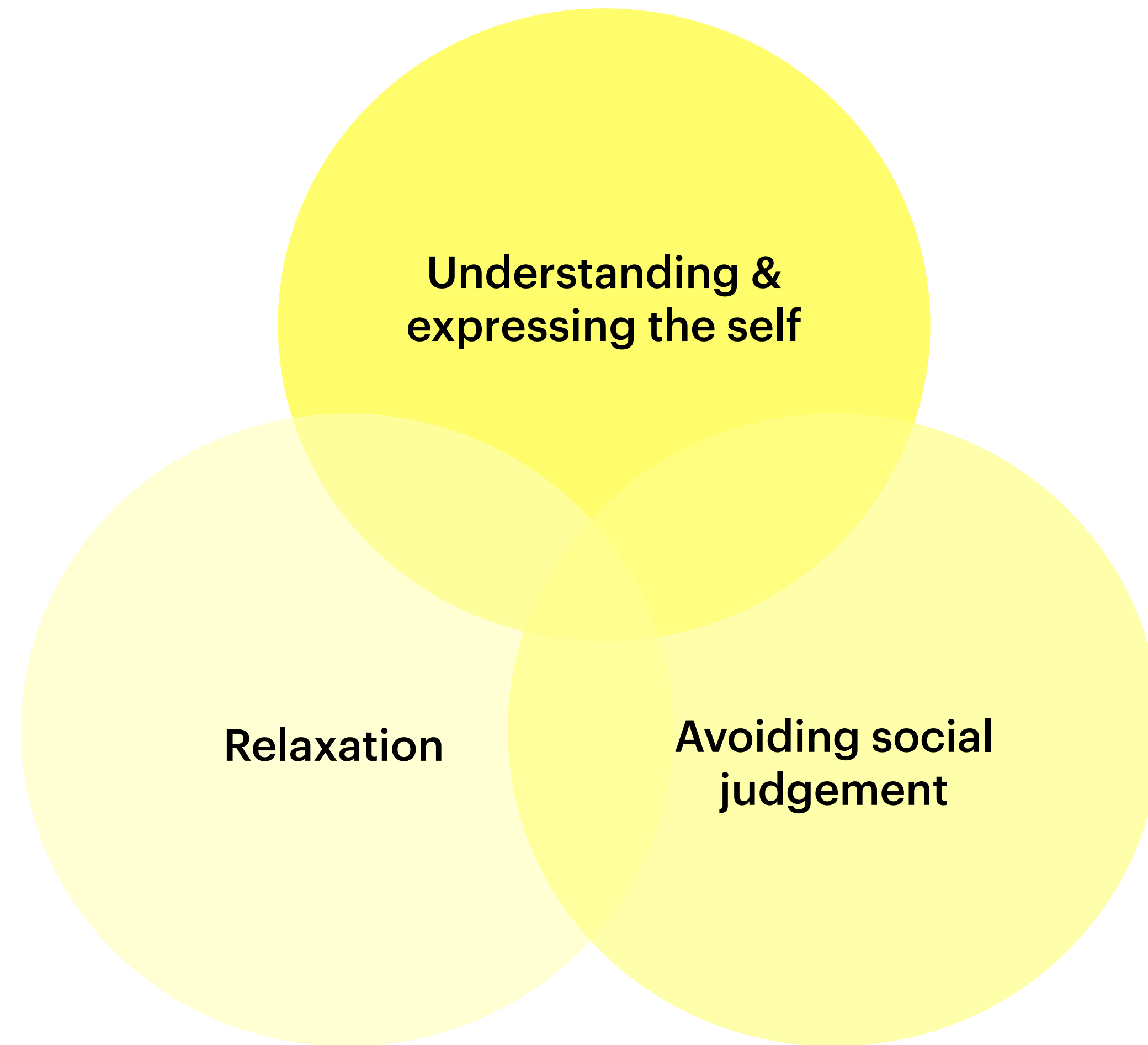


This new research takes a **holistic approach** to understanding online privacy, accounting for the ways in which digital environments can both enhance the benefits of privacy and mitigate threats to it.



Privacy yields important psychological benefits.*

The three primary benefits are:



*Darhl M. Pedersen, Psychological Functions of Privacy, Journal of Environmental Psychology, Volume 17, Issue 2, 1997

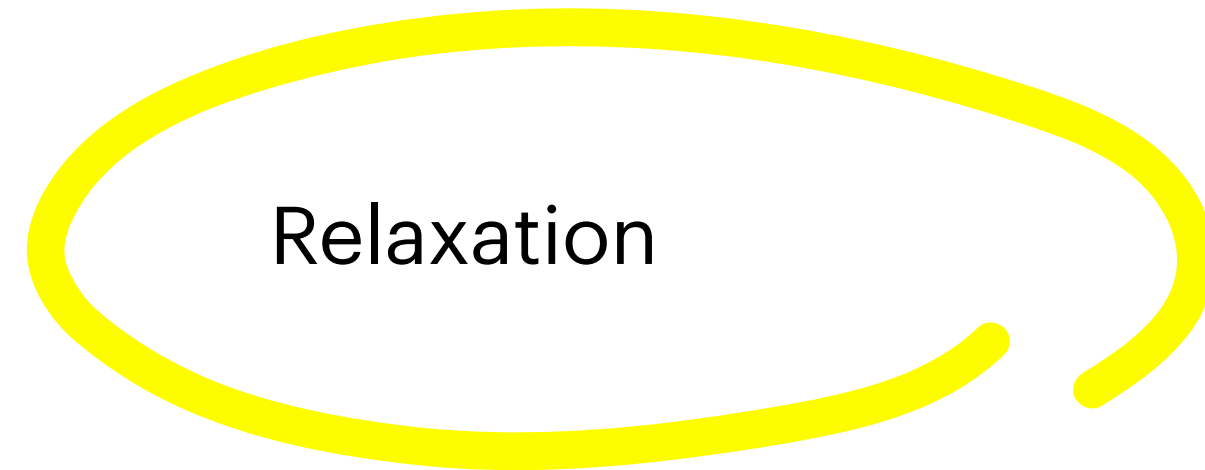
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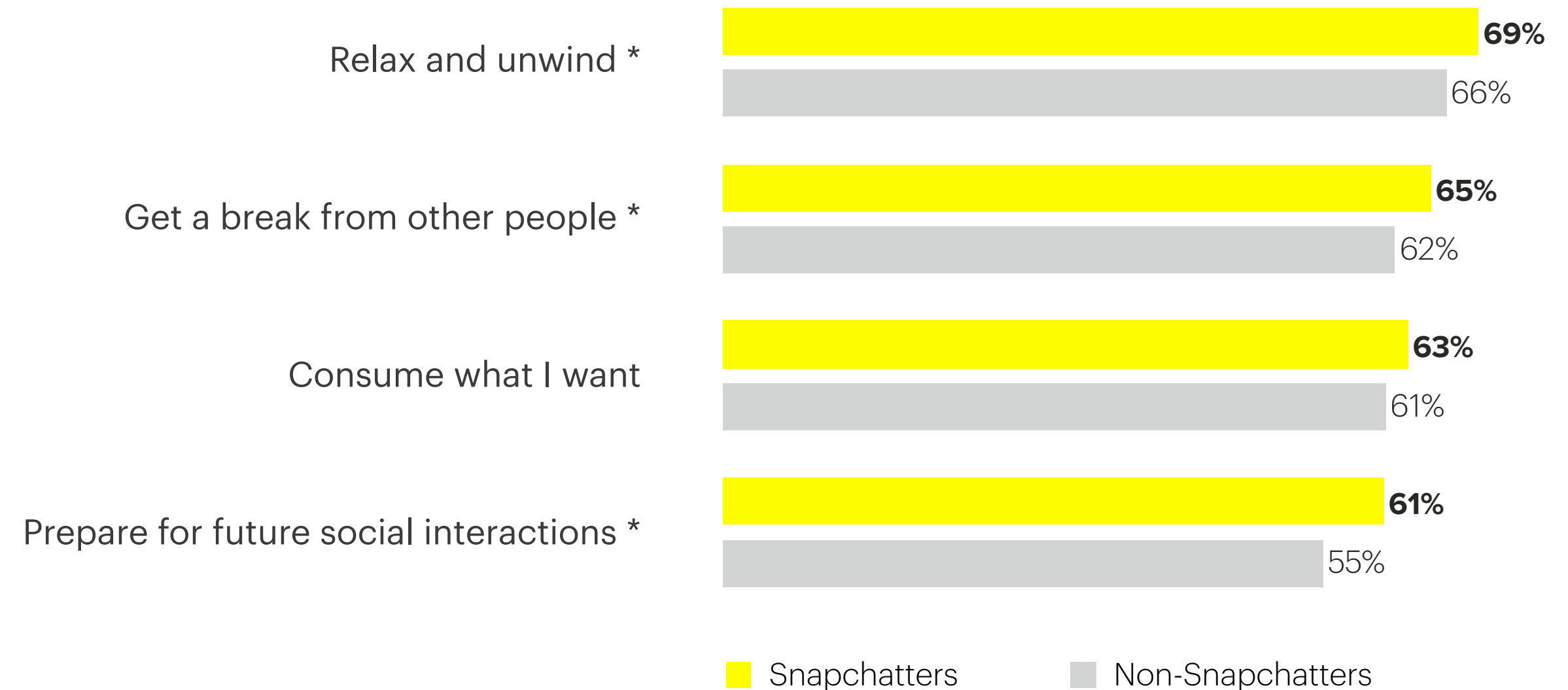


Privacy helps us relax by reducing the need to expend energy on social expectations and interactions.

Privacy benefits



Benefits of Privacy: Relaxation



Q10. Privacy can offer a variety of benefits and take many forms (from being alone, to feeling anonymous in a crowd or online space, to keeping your thoughts and feelings to yourself, to being in the company of people you trust). Considering the benefits you can get out of privacy and the many forms it can take, how true are the following statements for you? ; T3B Reported; International Total Sample = 13,519

* Statistically significant difference between Snapchatters (n=7,315) and Non-Snapchatters (n= 6,204)



Privacy allows us to explore, understand, express, and expand ourselves.

Privacy benefits

Relaxation

Understanding & expressing the self

Avoiding social judgement

Benefits of Privacy: Self-understanding/expression



Q10. Privacy can offer a variety of benefits and take many forms (from being alone, to feeling anonymous in a crowd or online space, to keeping your thoughts and feelings to yourself, to being in the company of people you trust). Considering the benefits you can get out of privacy and the many forms it can take, how true are the following statements for you? ; T3B Reported; International Total Sample = 13,519

* Statistically significant difference between Snapchatters (n=7,315) and Non-Snapchatters (n= 6,204)





Privacy gives us a safe space.

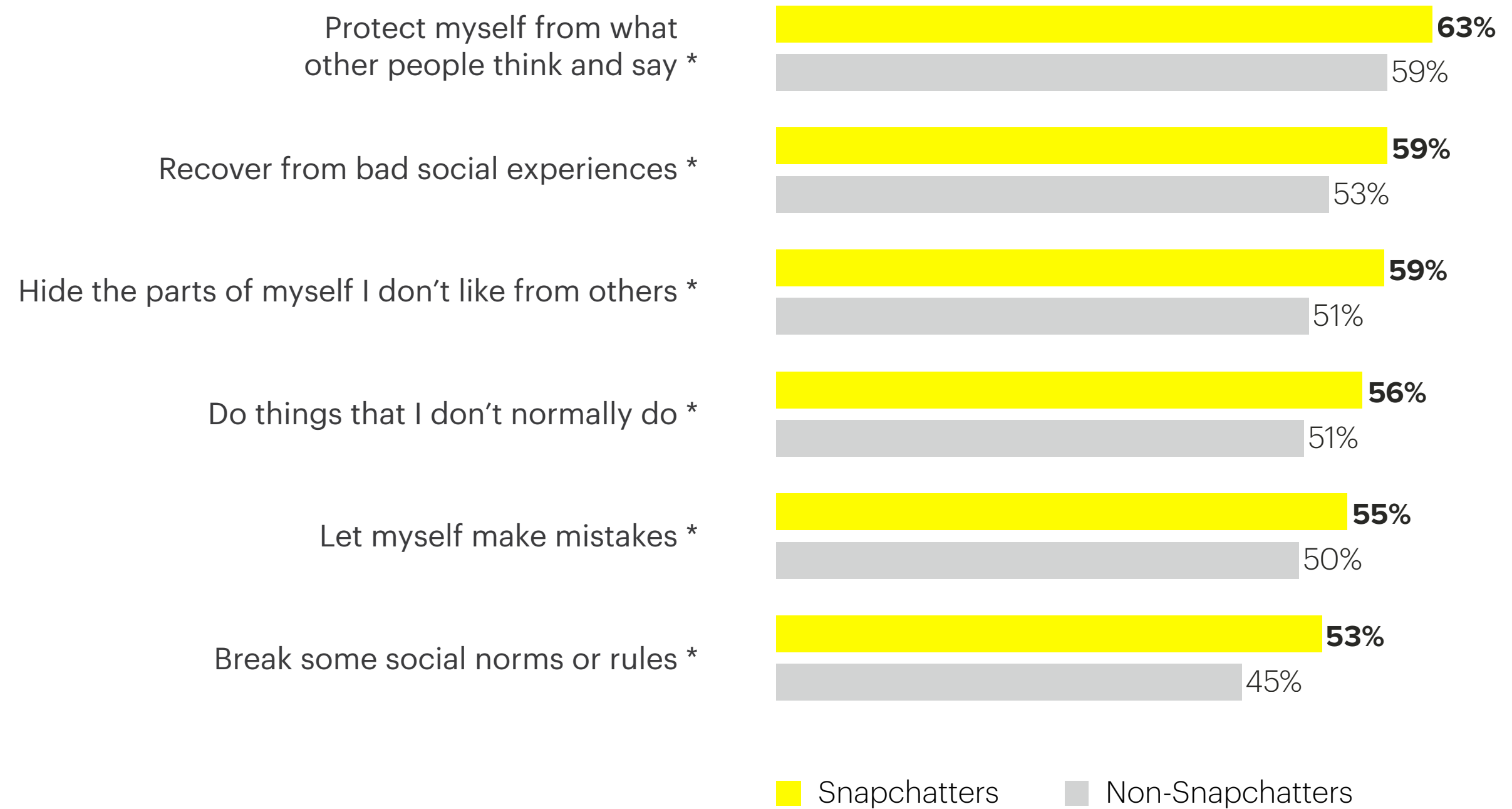
Privacy benefits

Relaxation

Understanding & expressing the self

Avoiding social judgement

Benefits of Privacy: Avoiding social judgement

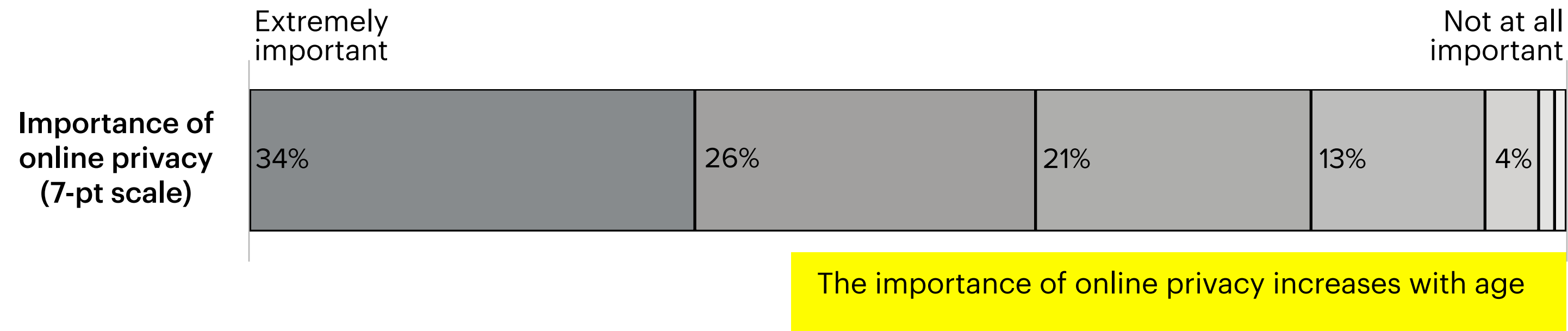


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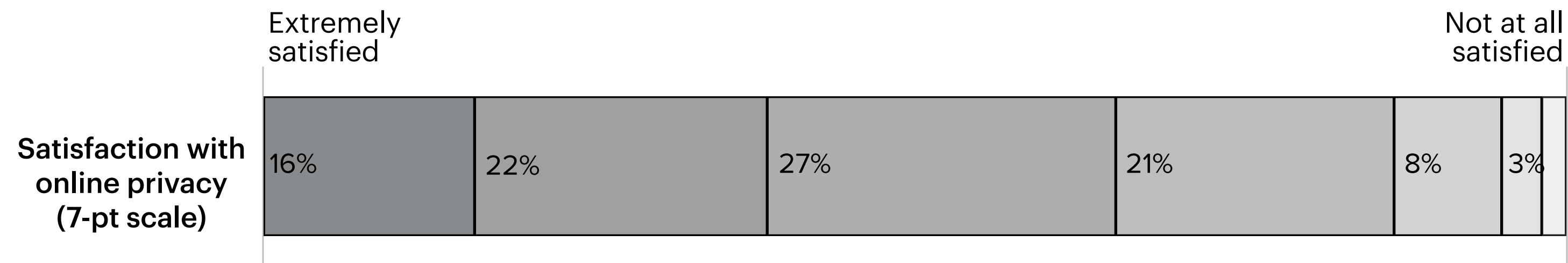


Snapchatters and Non-Snapchatters overwhelmingly care about their privacy, yet fewer are satisfied with the amount of privacy available to them.



81%

consider online privacy important (T3B)



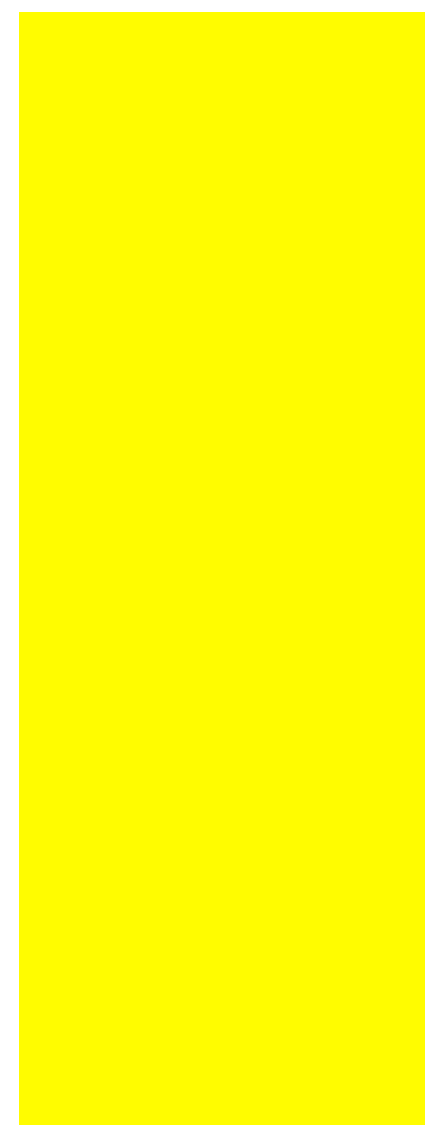
65%

are satisfied with their online privacy (T3B)

Q7. Now, please think more specifically about privacy online. This might include personal information or things you don't want to share with others online. On a scale from 1-7...
Q8. Still thinking about privacy online, on a scale from 1-7, where 7 means "I'm very satisfied" and 1 means "I'm very unsatisfied," how satisfied are you with the current amount...
T3B Reported for both; International Total Sample = 13,519; Snapchatters = 7,315; Non-Snapchatters = 6,204



Snapchatters are more satisfied with their current amount of online privacy than Non-Snapchatters.



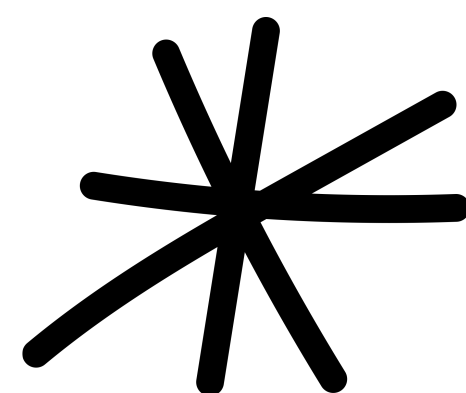
70%

of Snapchatters are satisfied with their current level of online privacy.



60%

of Non-Snapchatters are satisfied with their current level of online privacy.



The **privacy benefits** most valued by Snapchatters and Non-Snapchatters influence their behavior online

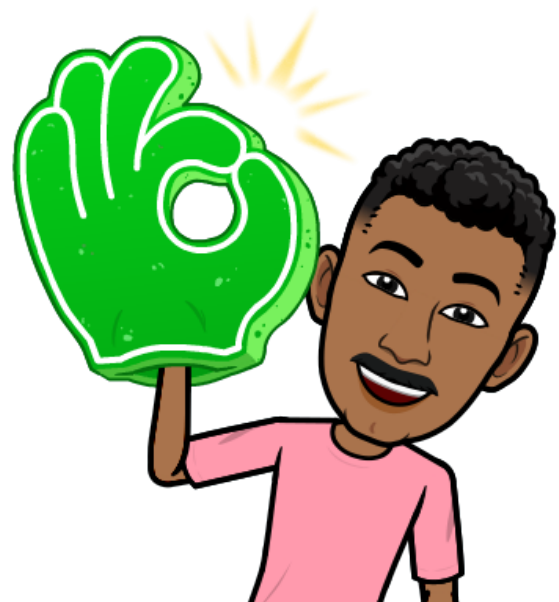


There are 6 privacy mentalities.

ENTHUSIASTS 19%

*Privacy persona:
Open, trusting, all-in*

Appreciate all types of privacy benefits & unconcerned with apps' privacy policies/features



EXPRESSIONISTS 14%

*Privacy persona:
Creative, self-assured*

Value privacy for the self-expression it enables & want apps to be safer for authentic communication and creativity



SATISFIED 23%

*Privacy persona:
Even-keeled, content*

Feel the ante for privacy has been already been met by social/communication apps



RELAXATION-CENTRIC 12%

*Privacy persona:
Skeptical, controlling*

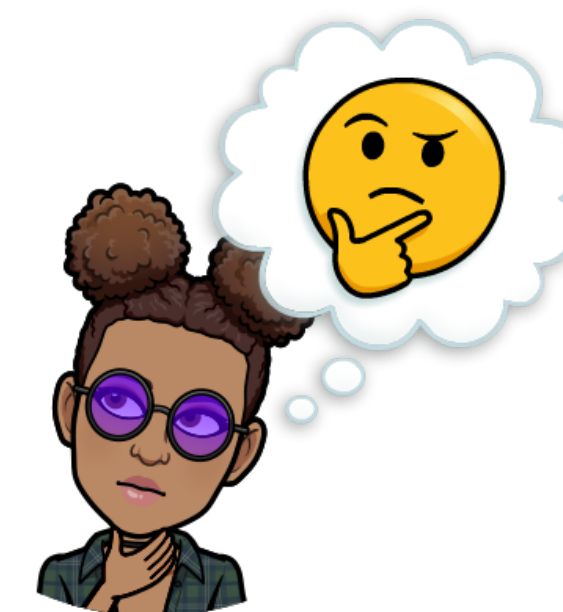
Value privacy mainly for relaxation & trust apps more when they allow greater control over visibility (block & hide content from specific people, go incognito, etc.)



RESIGNED 5%

*Privacy persona:
Along for the ride*

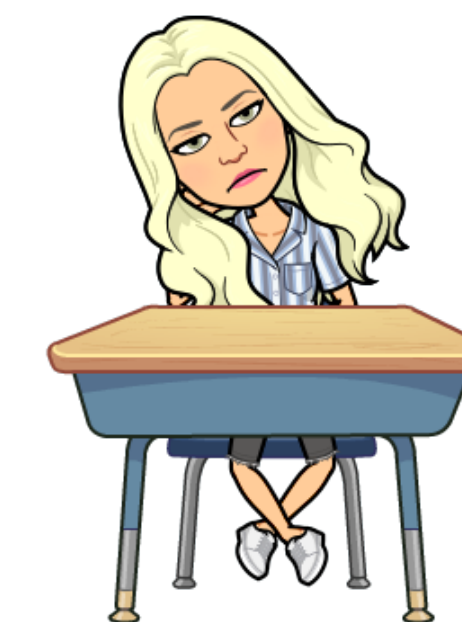
Don't believe privacy offers many benefits – but do believe it creates risks – and don't trust that apps to protect them



DETACHED 25%

*Privacy persona:
Apathetic*

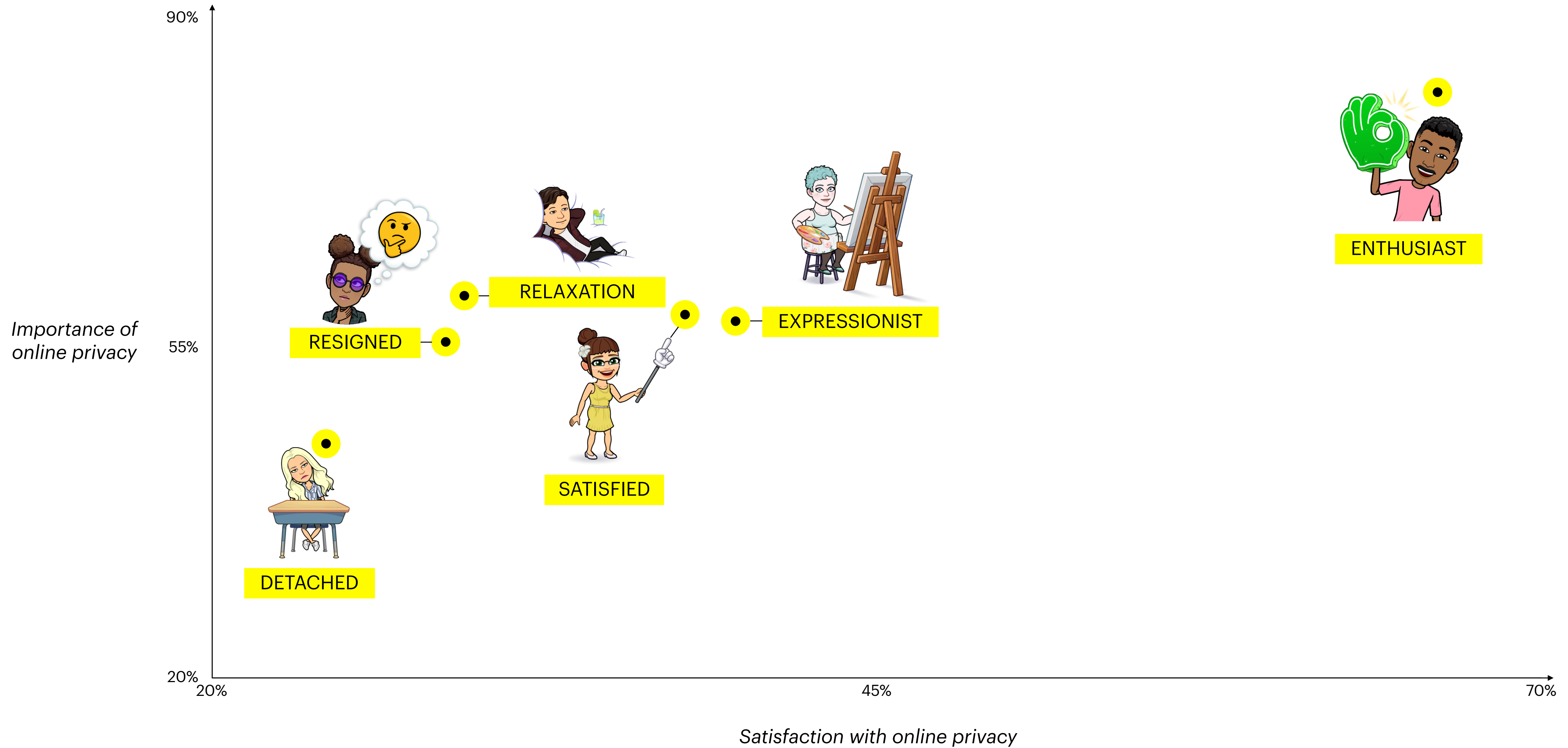
Very low satisfaction with current levels of online privacy and unmoved by apps' efforts to protect them



More likely to be Snapchatters.

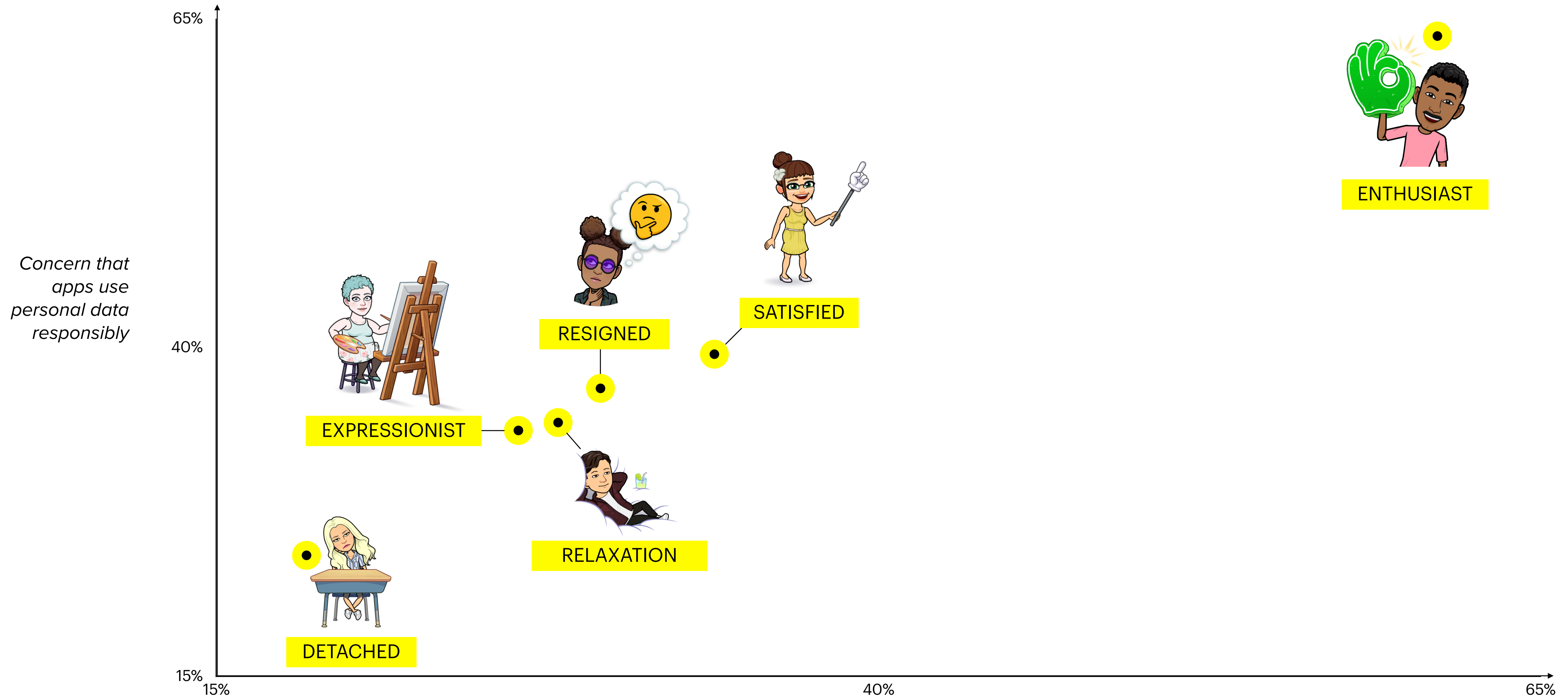


Concern about and satisfaction with online privacy vary across the 6 groups.





Concern about apps using data responsibly & willingness to share personal information also vary across segments.

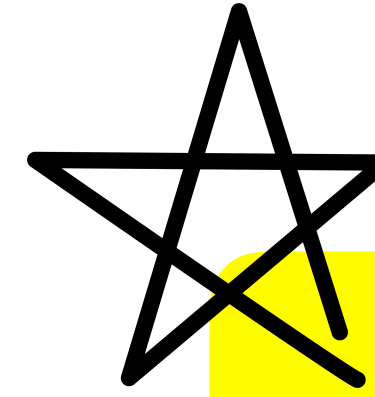




Privacy and data security concerns shape what both Snapchatters and Non-Snapchatters share.

59%

Say privacy and data security concerns impact their willingness to share on social/communication apps.

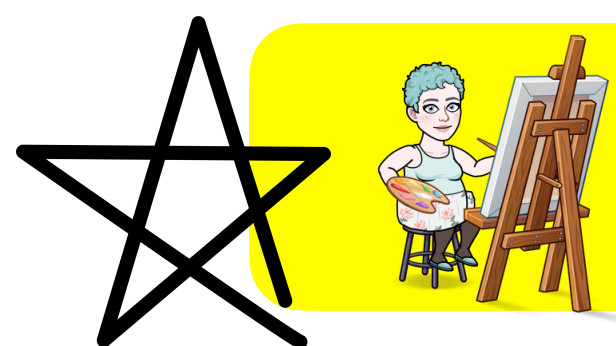
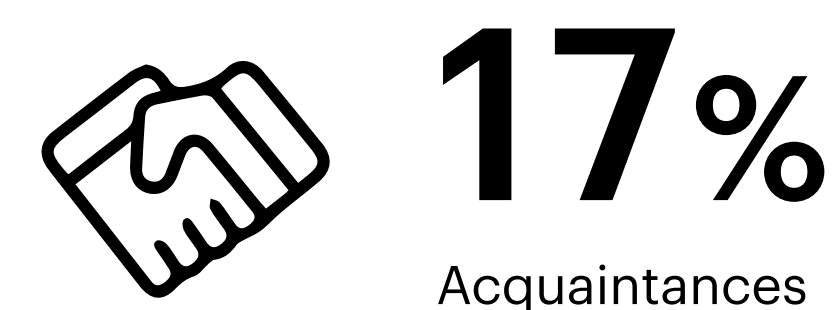
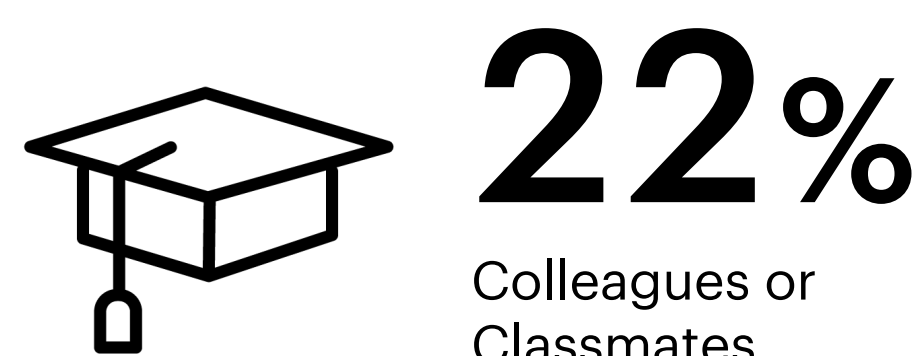
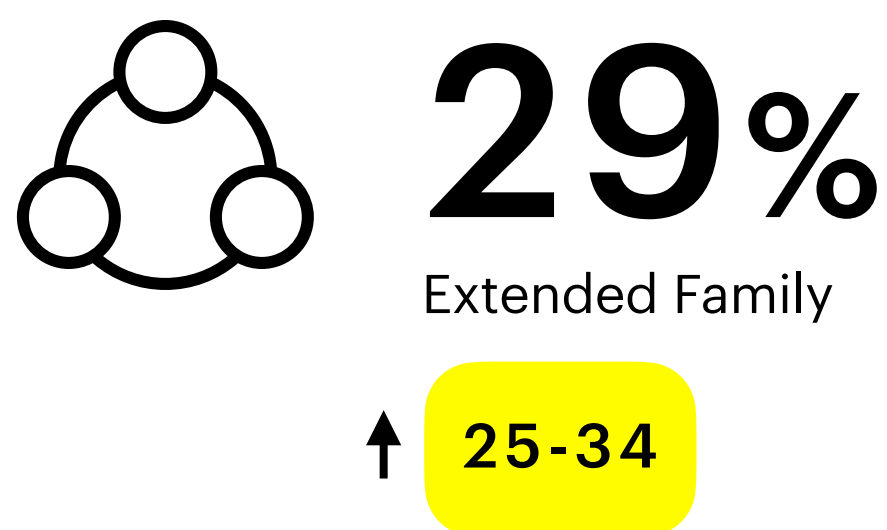
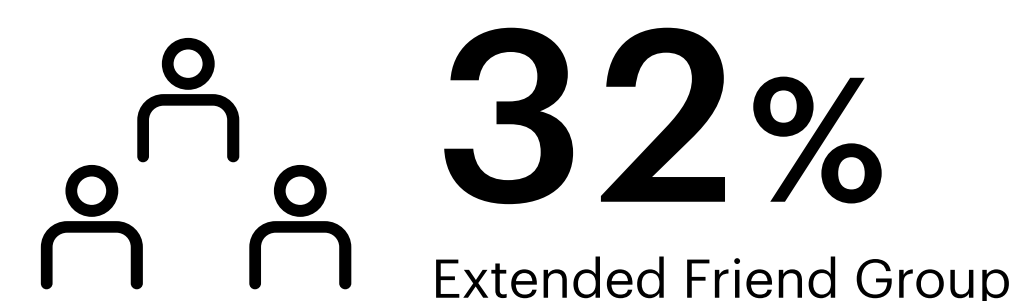
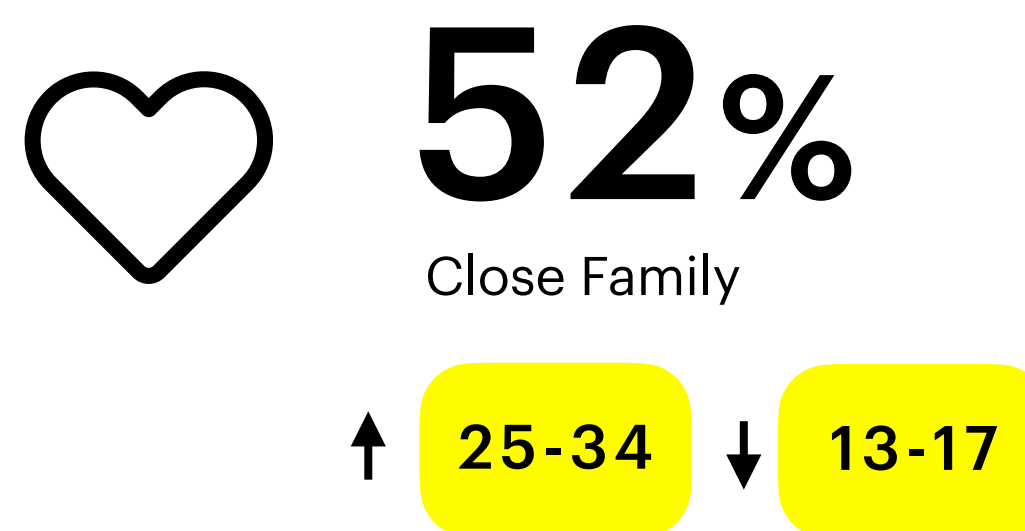
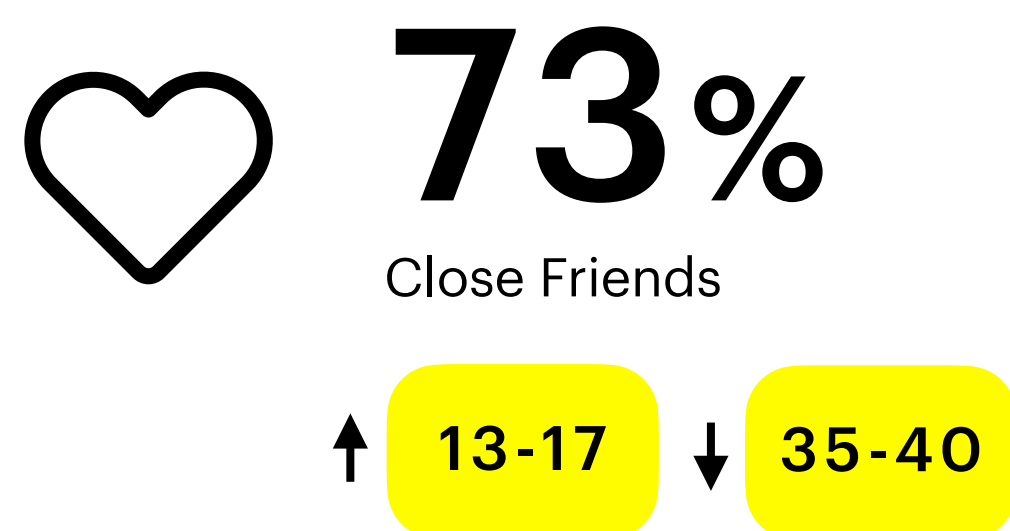


Older respondents (25-40) are much more likely than younger respondents (13-24) to say that privacy and data security concerns significantly impact their willingness to share on social/communication apps



Snapchatters share their location mainly with close friends and family.

Whom real-time location is shared with on Snapchat

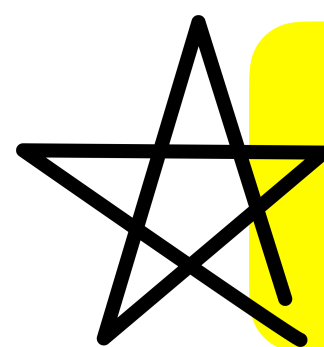
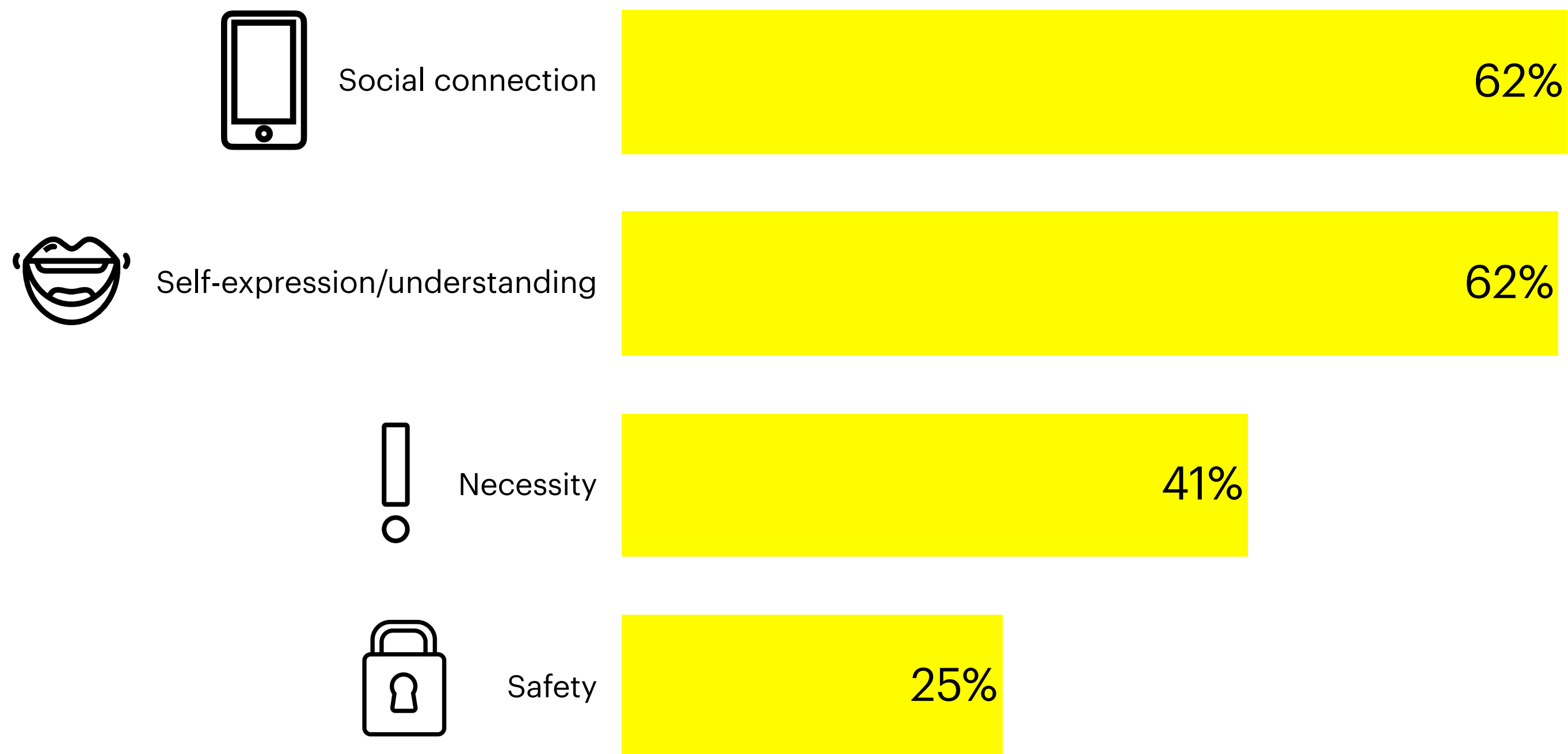


Among Snapchatters, **Expressionists** are the **most likely to share** their real-time location with a wide variety of people



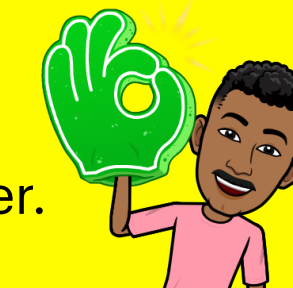
Snapchatters and Non-Snapchatters share their location primarily for social-emotional reasons.

Reasons for Sharing Location*



Expressionists are the most likely to share their location out of necessity.

Enthusiasts are the most likely to share their location because it makes them feel safer.



Q22/Q25/Q28. What are the main reasons why you share your real-time location with others/tag your location in posts/tag your location in direct messages while using apps?
International Total Sample Q22 = 4,033, Q25 = 4,005, Q28 = 2,827

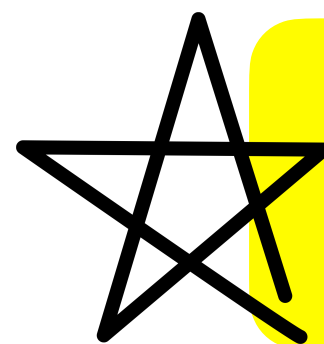
*Response options netted: Social connection = 'It keeps my friends up to date on what's going on in my life,' 'Because my friends do it,' & 'It's fun;' Self-expression/understanding = 'To share when I get to do something special,' 'To express the range of things I do,' & 'To hold onto important memories;' Necessity = 'To receive deliveries' & 'It makes meeting up with people easier/more efficient;' Safety = 'It makes me feel safer'



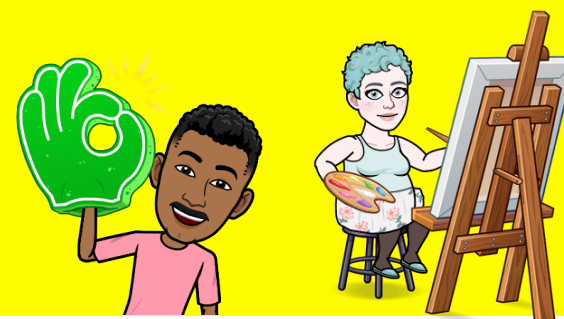
How apps approach privacy matters to both Snapchatters and Non-Snapchatters.

3/4

of users consider it important that the social/communication apps they engage with care about and protect their privacy.



Enthusiasts and Expressionists are very likely to consider it important that the social and communication apps they use care about and protect their privacy.

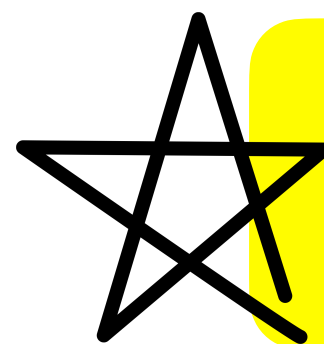




Snapchatters and Non-Snapchatters are primarily concerned about what happens with the content they create or share, and how their information is used.

Top privacy concerns

1. Other people being able to share my posts/information without my knowledge/permission
2. Knowing that your activity in the app is being tracked
3. Being asked to share personal information in order to set up an account
4. Receiving spam messages
5. Getting trolled or bullied by others who use the app/website
6. Seeing fake news or suspicious content
7. Knowing that your posts and/or messages are stored permanently
8. The broader public being able to see what you say and do
9. Privacy settings being hard to find and/or difficult to use
10. The company's privacy policy being difficult to understand



Younger respondents (13-24) are more concerned about other people being able to share their posts/information without their knowledge and/or permission.

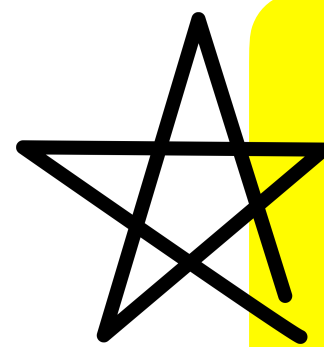
Older respondents (25-40) are more concerned about knowing their activity in the app is being tracked



Increasing trust in apps depends more on enhancing users' control over what they share and who can see their activity than on privacy policies.

Features that increase trust in apps

1. The ability to delete content
2. The ability to block specific people
3. The ability to hide content from specific people
4. The ability to go incognito/private
5. Receiving an alert if someone screenshots or records my posts or messages
6. The ability to share my posts and comments only with people I'm close to
7. The ability to easily use and understand privacy settings
8. The company's privacy policy being easy to understand
9. Knowing that my posts/messages can disappear automatically
10. Not seeing targeted advertising



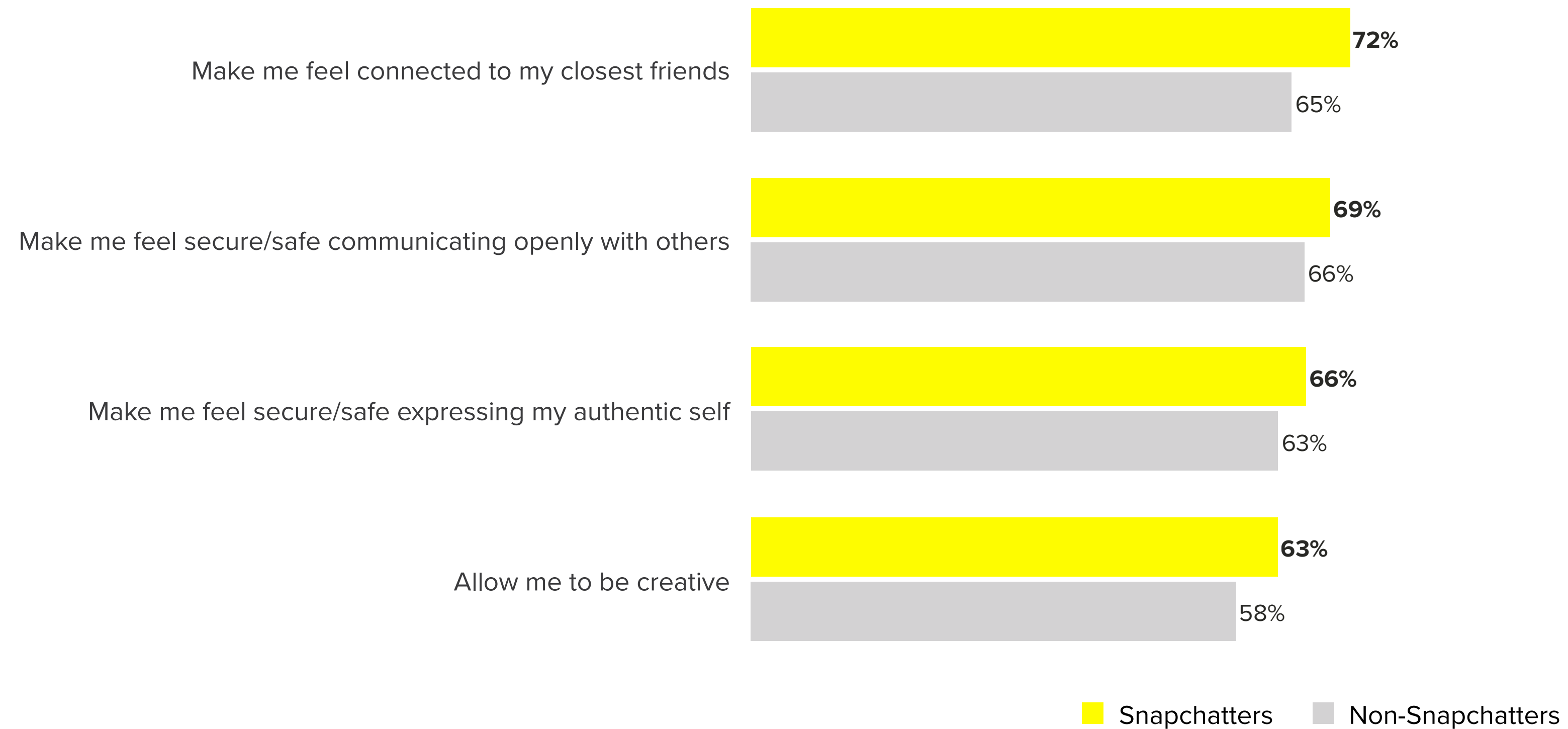
Snapchatters are more likely to derive trust from Snap's distinctive features:

- receiving alerts if someone screenshots or records their posts/messages
- knowing their posts/messages will disappear automatically



Snapchatters value apps that support close personal connections and the benefits of privacy that arise from them – open communication, self-expression, and creativity.

Importance of Social/Communication Apps providing privacy benefits





Conclusion

Snapchatters are more likely than non-Snapchat users to derive benefits of privacy that involve self-expression and avoiding social judgement – they benefit from settings that allow social interaction and creative freedom, but without the fear of social critique.

They value apps that facilitate close social interaction with friends and telling their own story creatively – features that Snapchat ranks best at among social and communication apps.

Thank you

