



Ipsos Public Affairs

**Centre for International
Governance Innovation**

CIGI-IPSOS GLOBAL SURVEY INTERNET SECURITY & TRUST

2019 PART 6:

CROSS-BORDER DATA FLOWS



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GAME CHANGERS



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METHODOLOGY & TAKE-AWAYS

METHODOLOGY

- This survey was conducted by Ipsos on behalf of the Centre for International Governance Innovation (“CIGI”) between December 21st, 2018 & February 10th, 2019.
 - All online economies were fielded between December 21st, 2018 & January 4th, 2019.
 - Below are the field dates, for the offline economies:
 - Pakistan: Jan 14th – Feb 10th
 - Tunisia: Jan 24th – 31st
 - Kenya: Jan 28th – Feb 7th
 - Nigeria: Jan 25th – Feb 7th
- The survey was conducted in 25 economies—Australia, Brazil, Canada, China, Egypt, France, Germany, Great Britain, Hong Kong (China), India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, Pakistan, Poland, Russia, South Africa, Republic of Korea, Sweden, Tunisia, Turkey and the United States—and involved 25,229 Internet users. Twenty-one of the economies utilized the Ipsos Internet panel system while four (Kenya, Nigeria, Pakistan & Tunisia) utilized face-to-face interviewing, given online constraints in these economies and the length of the poll.
- The average LOI (length of interview) of the online survey was ~10 minutes. The average LOI for the face-to-face interviews was around 20 minutes, or more.
- In the US and Canada respondents were aged 18-64, and 16-64 in all other economies.
- Since 2018, the economies of Russia and South Africa have been included in the BRICS definition, which previously only included Brazil, India, and China (BIC). For analytical purposes, the BRICS data is tracked against the BIC data from previous surveys, though the comparison is not direct.
- Approximately 1,000+ individuals were surveyed in each economy and are weighted to match the population in each economy surveyed. The precision of Ipsos online polls is calculated using a credibility interval. In this case, a poll of 1,000 is accurate to +/- 3.5 percentage points. For the face-to-face interviews, the margin of error is +/-3.1, 19 times out of 20.

BRICS = Brazil, Russia, India, China, South Africa
APAC = Asia Pacific
LATAM = Latin America

ECONOMY ABBREVIATIONS

Total	TL
Australia	AU
Brazil	BR
Canada	CA
China	CN
Egypt	EG
France	FR
Germany	DE
Great Britain	GB
Hong Kong (China)	HK
India	IN
Indonesia	ID
Italy	IT

Japan	JP
Kenya	KE
Mexico	MX
Nigeria	NG
Pakistan	PK
Poland	PL
Republic of Korea	KR
Russia	RU
South Africa	ZA
Sweden	SE
Tunisia	TN
Turkey	TR
United States	US

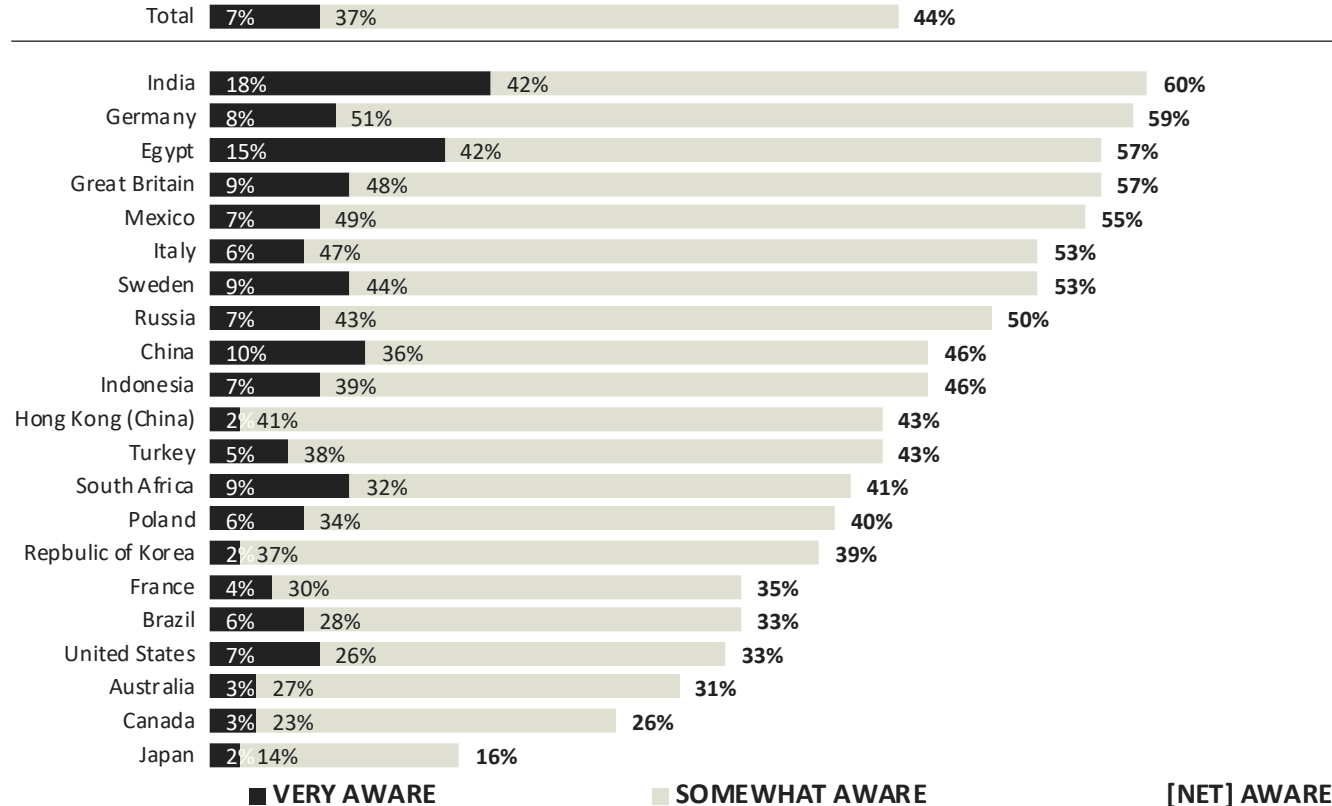
FIVE KEY TAKE-AWAYS

- 1** Awareness of data protection & privacy rules is low, particularly in the North American economies. Is ignorance bliss?
- 2** Relatively few say that it doesn't bother them that their data, the data of the companies they use, and their government's data sometimes leaves the economy. The type of data (their own, their government's, business, etc.) doesn't seem to matter as opinions are similar across these data types.
- 3** Globally, strong majorities would prefer to have their online data & information physically stored on a secure server, in their own economy. However, a majority of those in Latin America agree that they want their data to be stored outside of their economy – the only region where this is the case.
- 4** Fewer than half (48%) *agree* that their government does enough to safeguard their online data & personal information. There is a much stronger belief that the government is not doing enough in the European, North American & G-8 economies.
- 5** Regardless of the experimental treatment to which respondents were exposed, there is limited variation in opinion vis-à-vis all aspects of cross-border data flows, which suggests that people might already have their minds made up about whether or not they care about where their data resides, and arguments for or against are not likely to persuade them.

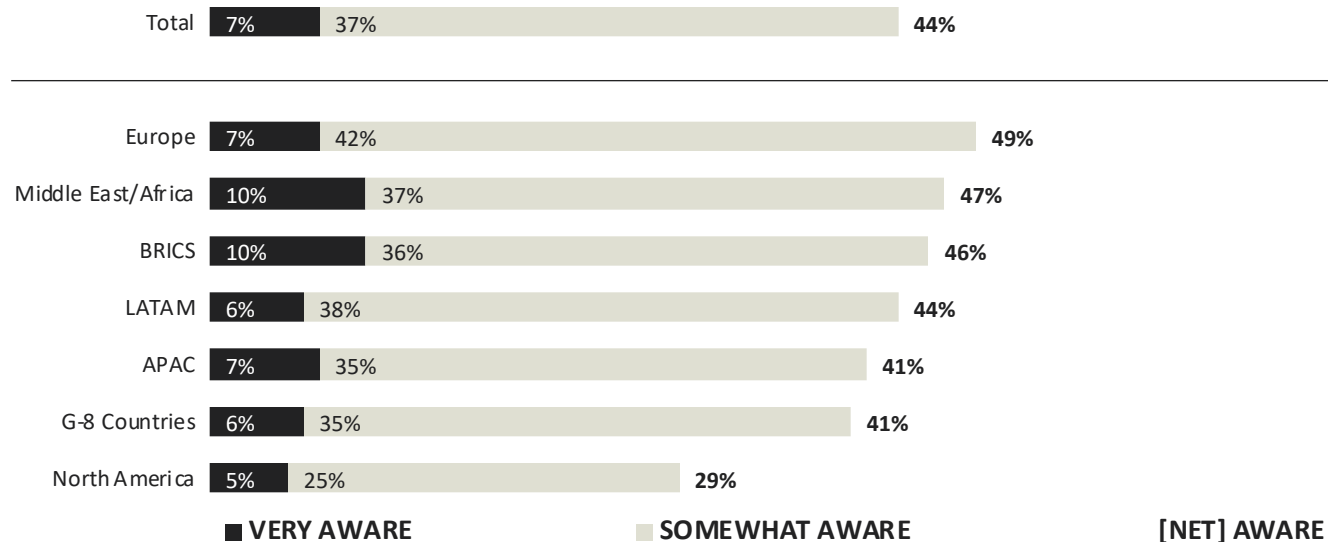


DATA PROTECTION & PRIVACY

Overall, fewer than half (44%) of global citizens feel as though they are aware of the data protection & privacy rules, in their own economy, ranging from highs of six in ten in India (60%) & Germany (59%) to a low of sixteen percent (16%) in Japan.



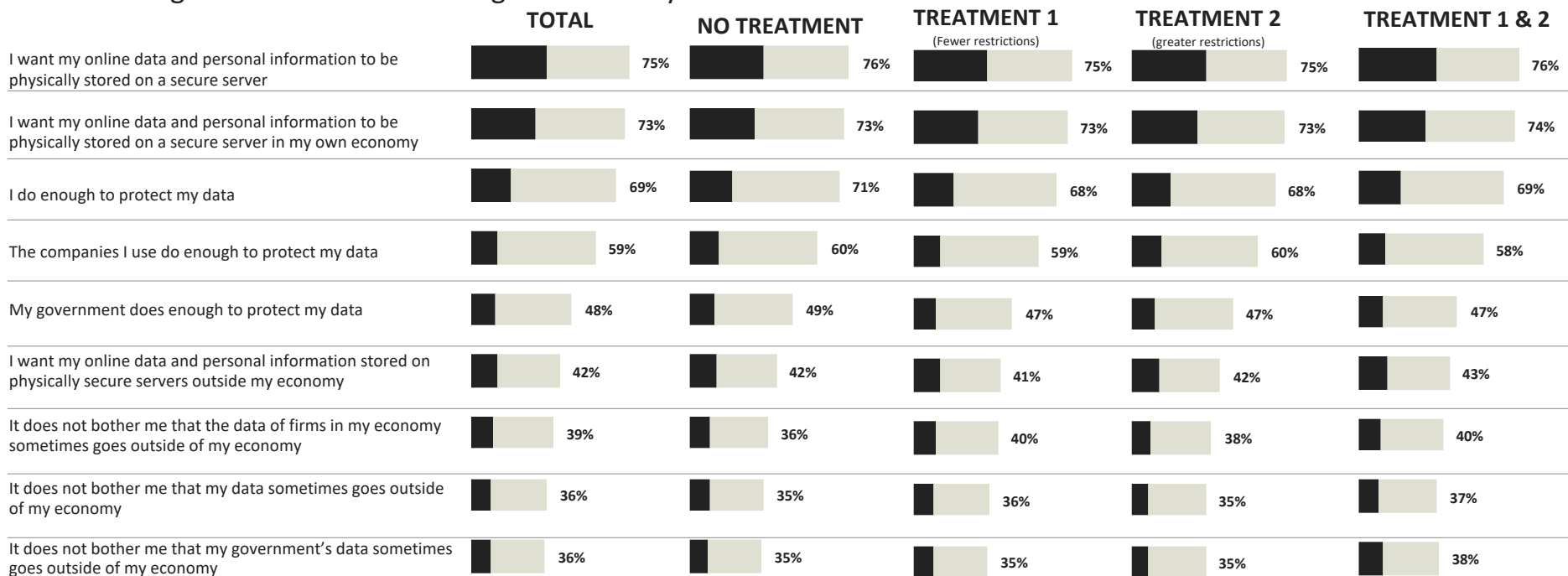
North Americans rate themselves strikingly lower on awareness, relative to the global average.





CROSS-BORDER DATA FLOWS

Regardless of treatment, there is limited variation in opinion across most statements. However, those who are exposed to arguments favouring fewer cross-border data restrictions tend to be less concerned about data leaving the economy. Somewhat interestingly, those who receive no treatment are more likely to think they do enough to protect their data whereas those who saw both treatments are more inclined to *agree* that they are not bothered by their own government's data leaving the economy.



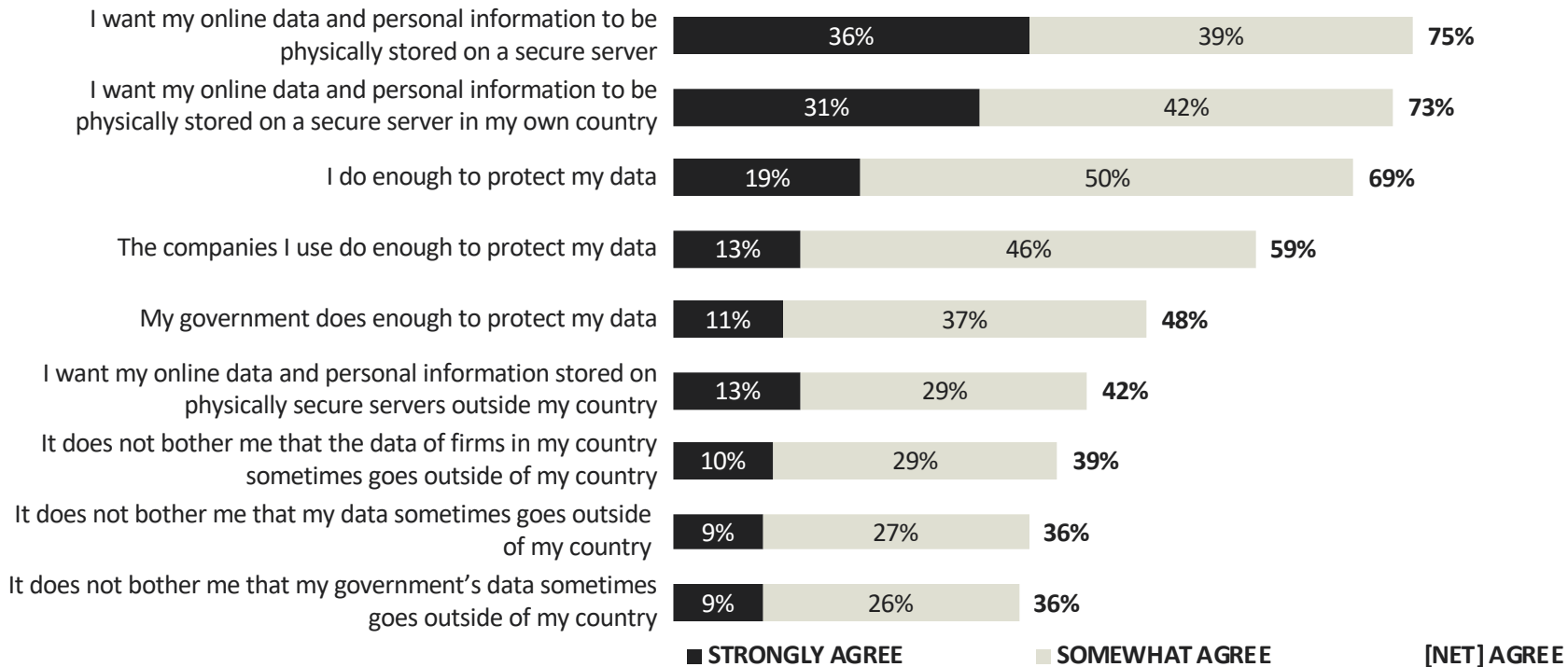
STRONGLY AGREE



SOMEWHAT AGREE

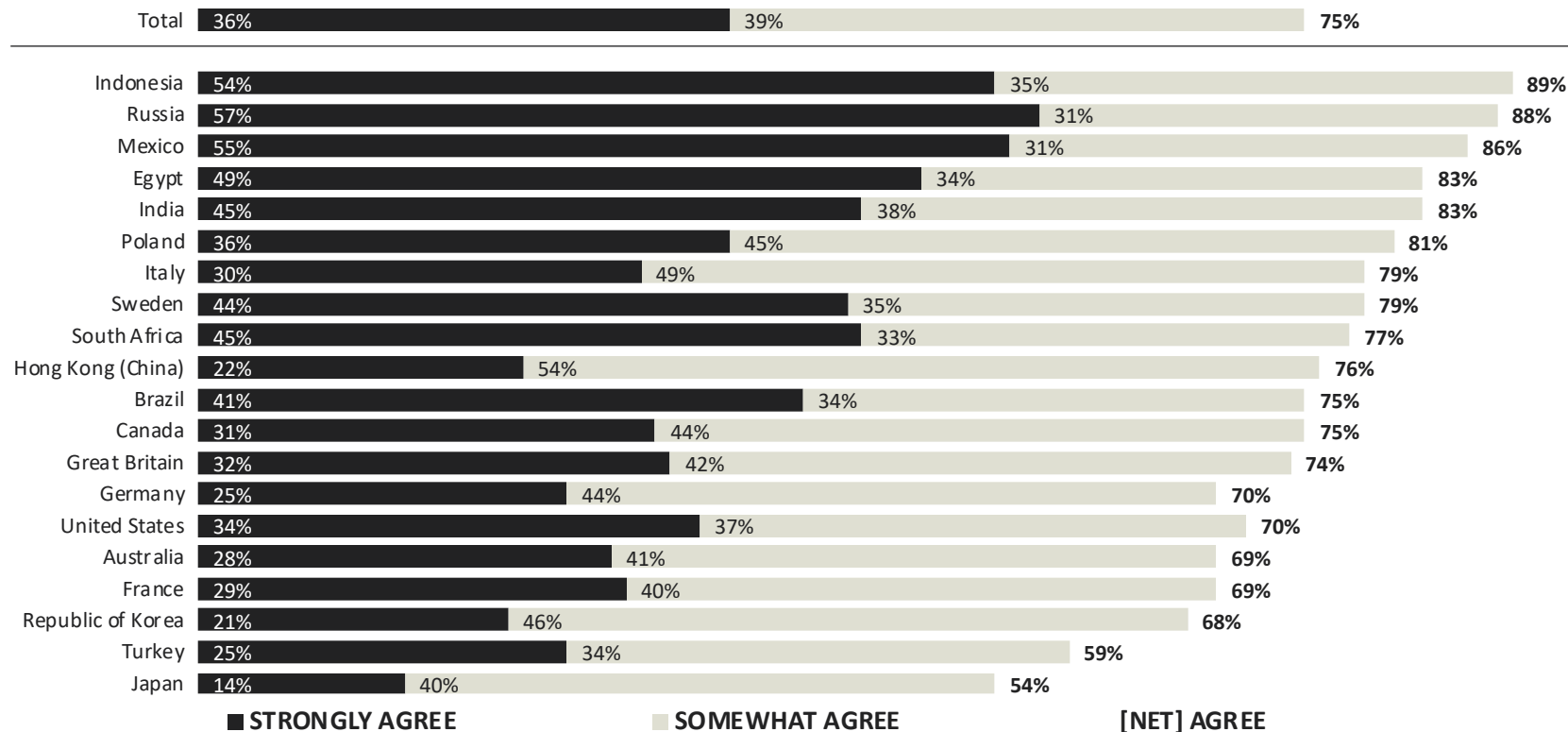
[NET] AGREE

Overall, most *agree* that physical storage of online data & personal information is important, that they & the companies they use do enough to protect their data and that cross-border data flows bother them. Less than half (48%) would *agree* that their own government is doing enough to safeguard their online data & personal information.



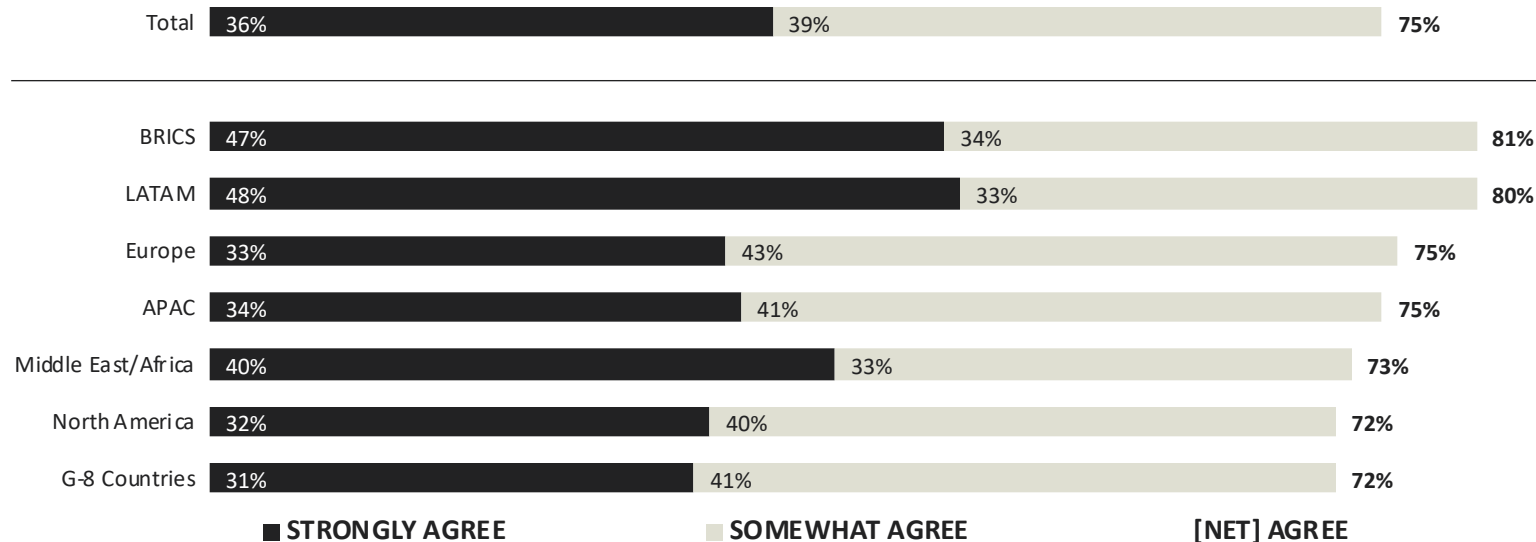
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER

In every economy, most *agree* that they would like their online data & personal information to be physically stored on a secure server, ranging from around nine in ten in Russia (88%) & Indonesia (89%) to a slim majority (54%) in Japan.



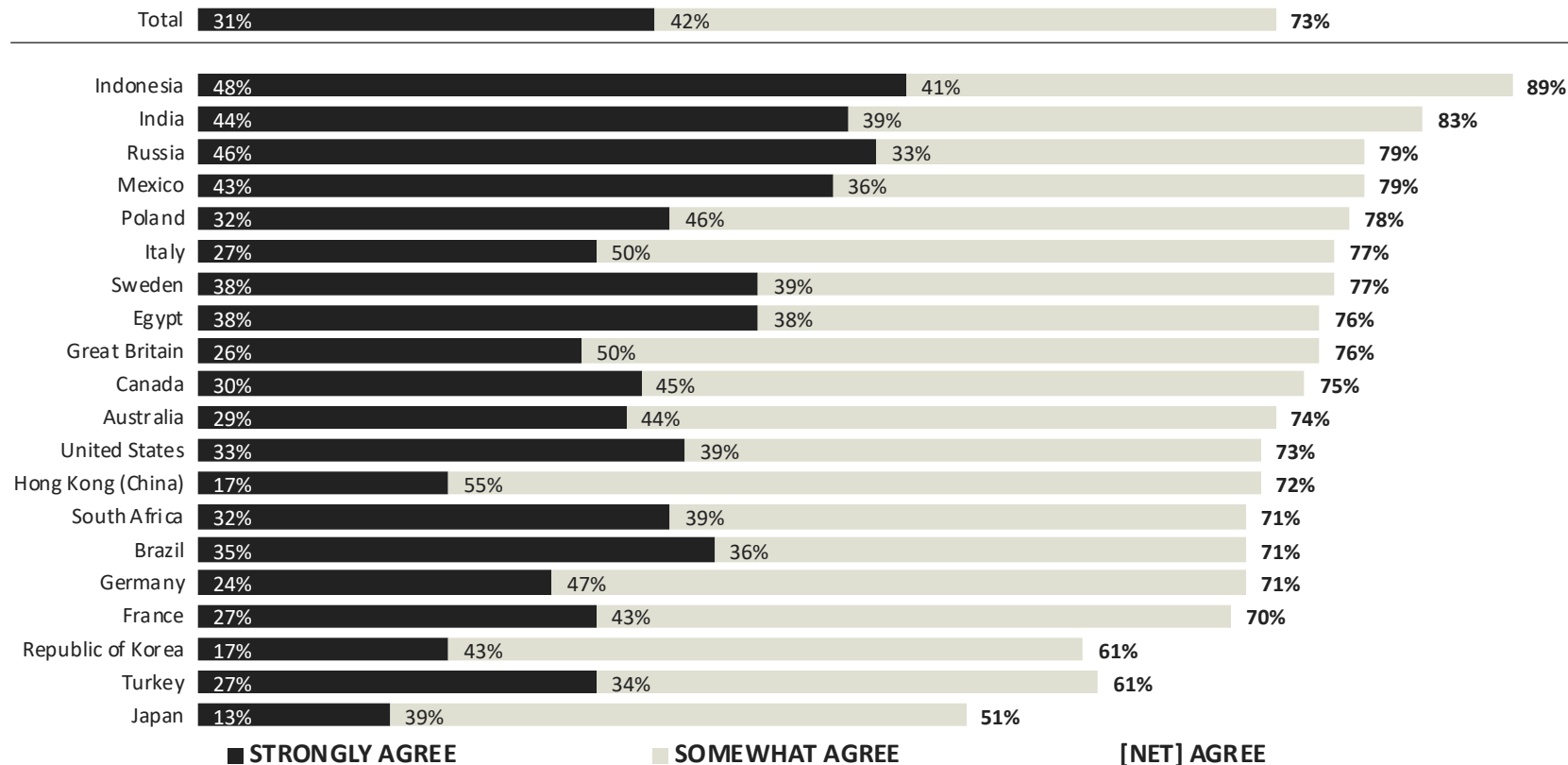
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER

Four in five in the BRICS & LATAM economies *agree* that they would prefer to have their data & personal information physically stored on a secure server, while closer to three in four feel this way in all other regional economies.



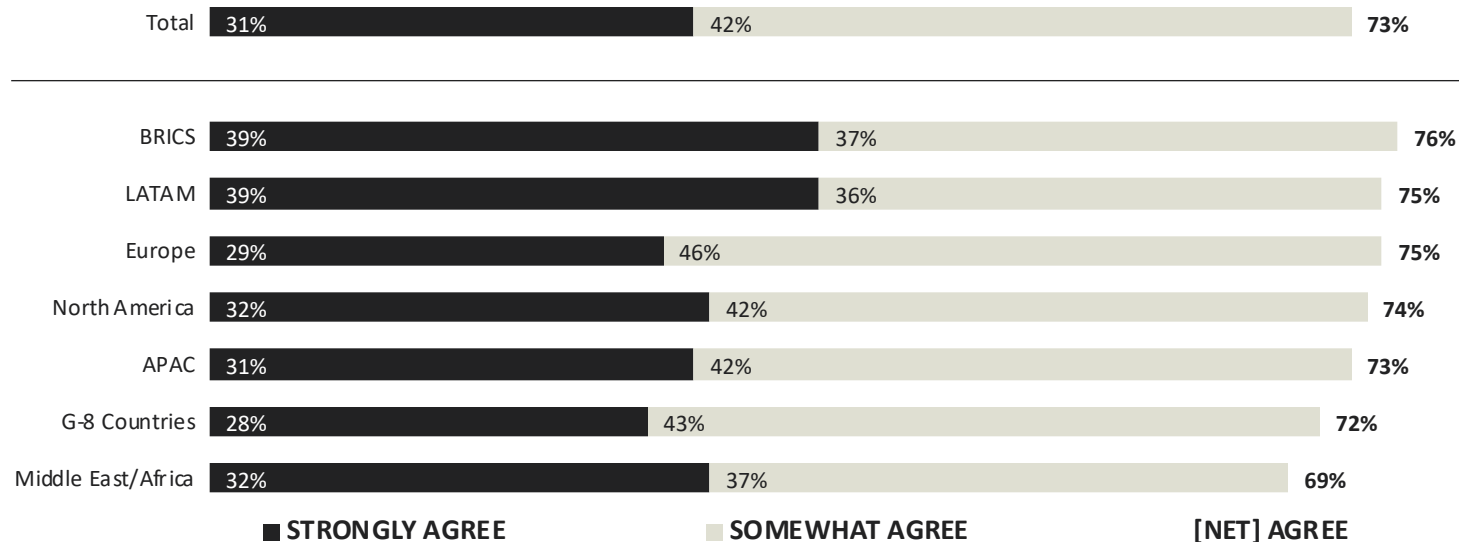
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER IN MY OWN ECONOMY

Interestingly, results don't change very much even when it is specified that data would reside on a server in their own economy. In fact, overall, fewer (-5%) strongly disagree.



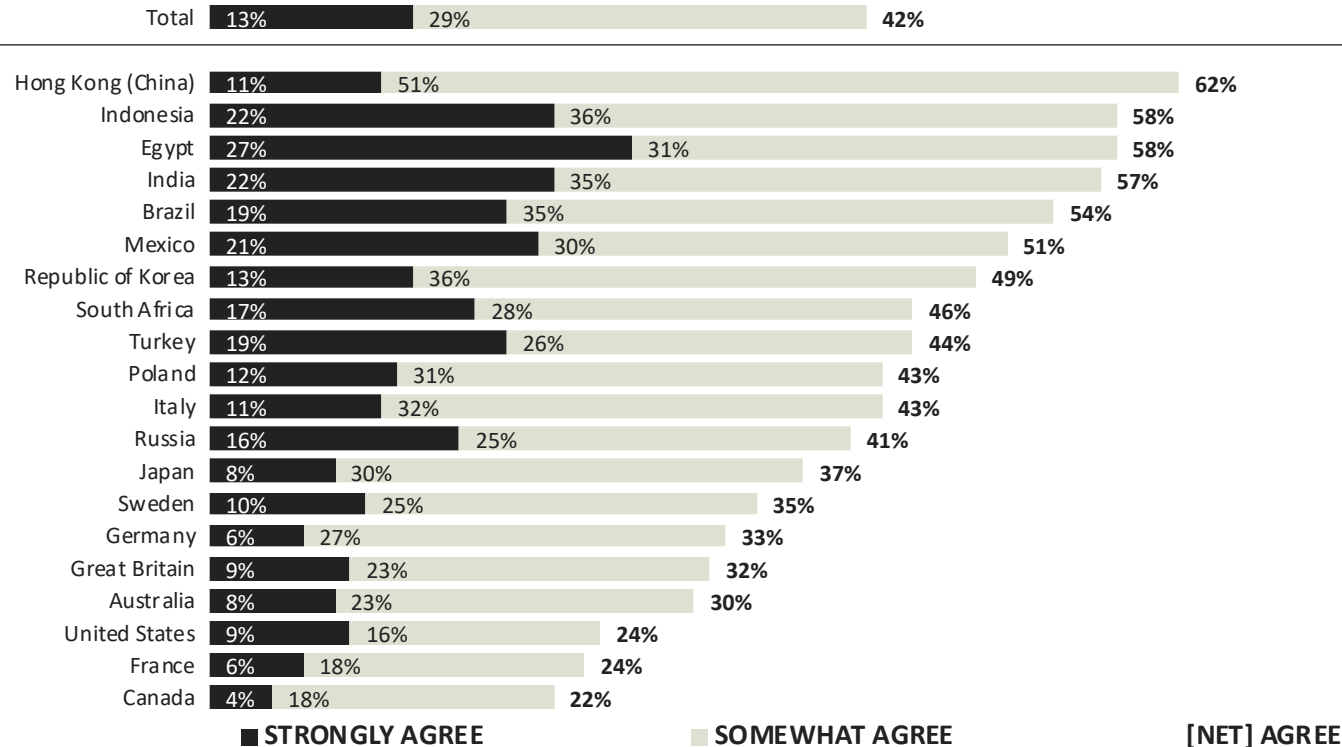
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER IN MY OWN ECONOMY

There is limited regional variation, as around seven in ten, or more *agree* that they would like to have their online data & personal information physically stored on a secure server in their own economy, regardless of economy.



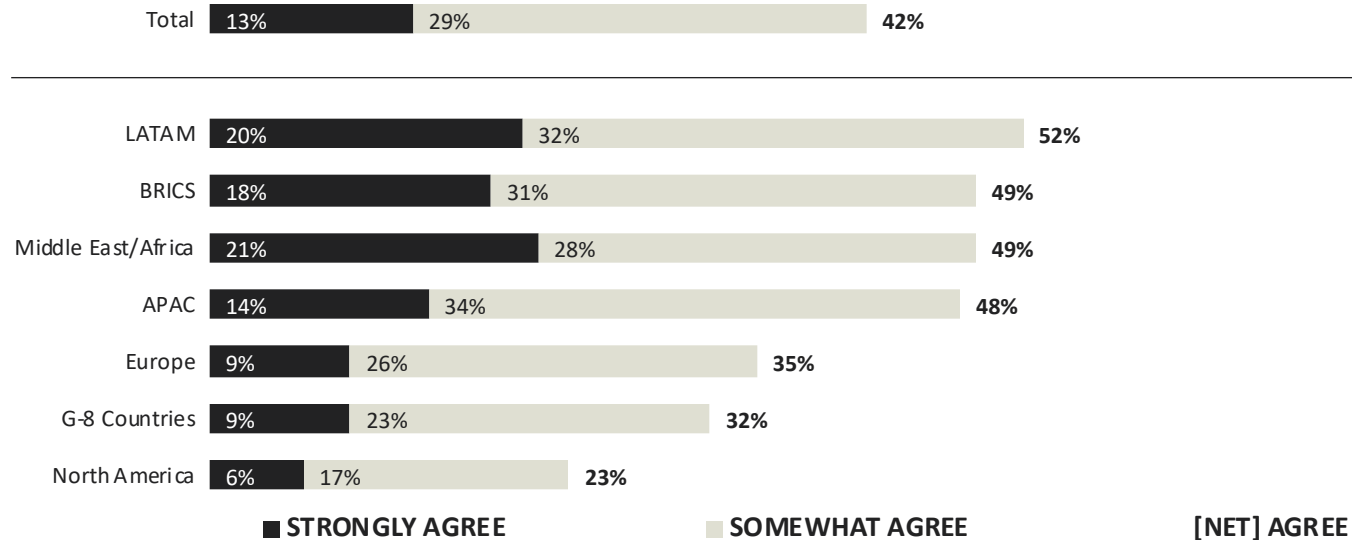
I WANT MY ONLINE DATA AND PERSONAL INFORMATION STORED ON PHYSICALLY SECURE SERVERS OUTSIDE MY ECONOMY

Globally, about two in five (42%) *agree* that they would like to have their online data & personal information stored on physically secure servers outside of their economy, ranging from a high of 62% in Hong Kong (China) to a low of 22% in Canada.



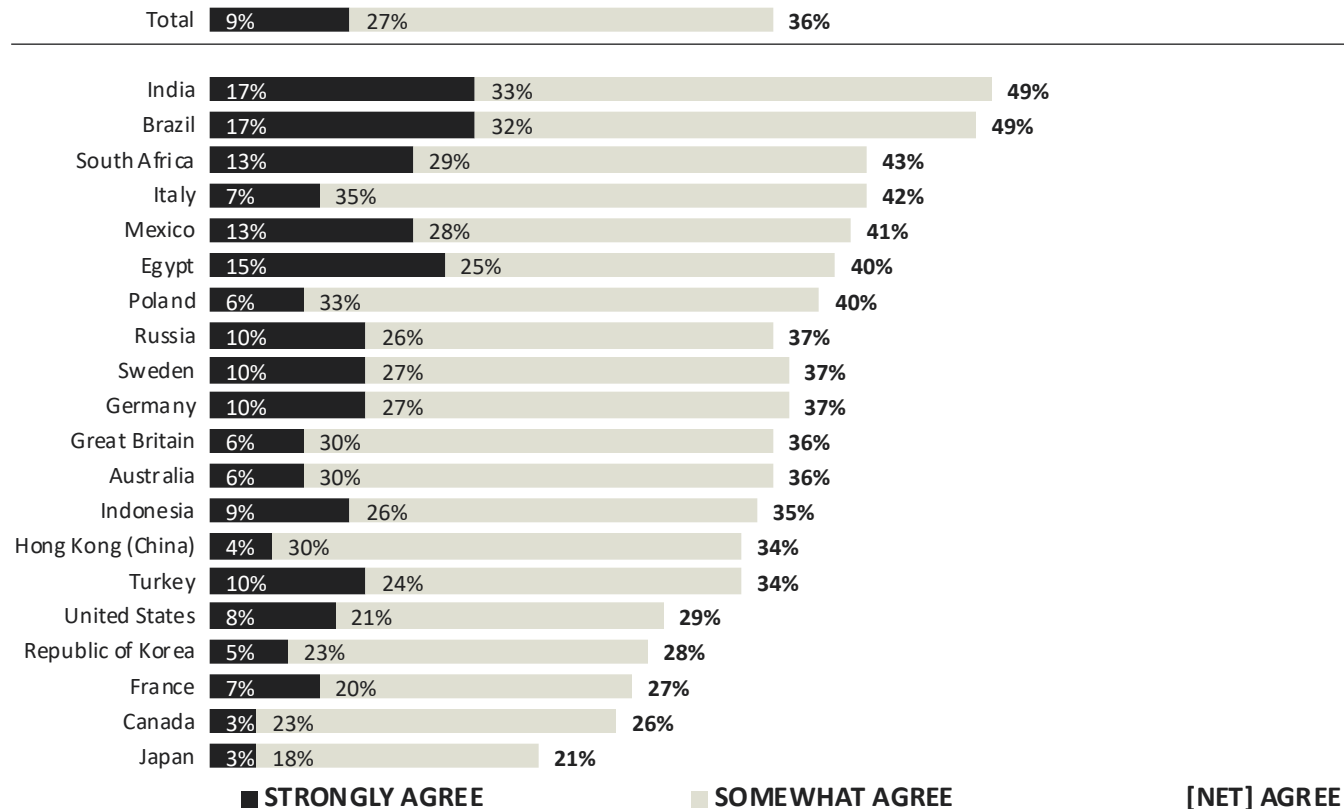
I WANT MY ONLINE DATA AND PERSONAL INFORMATION STORED ON PHYSICALLY SECURE SERVERS OUTSIDE MY ECONOMY

LATAM economies are the only ones in which a majority (52%) *agrees* that they would like to have their online data & personal information stored on physically secure servers outside of their economy.



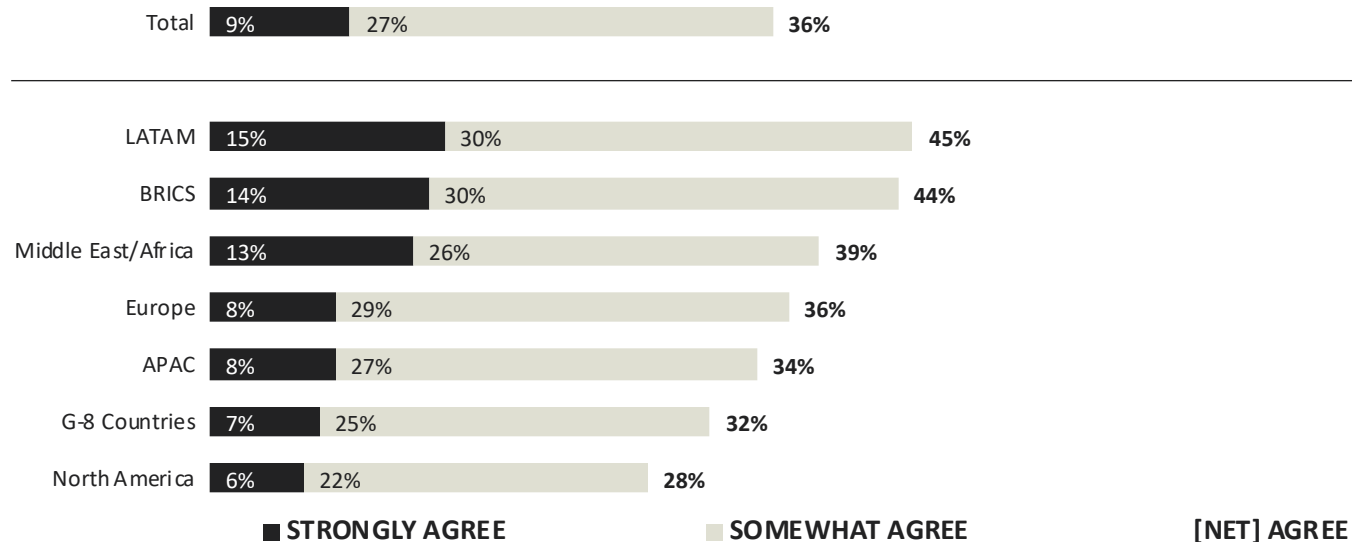
IT DOES NOT BOTHER ME THAT MY DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

One in three (36%) are not bothered by the fact that their data sometimes goes outside of their economy, led by half in India & Brazil (49% apiece).



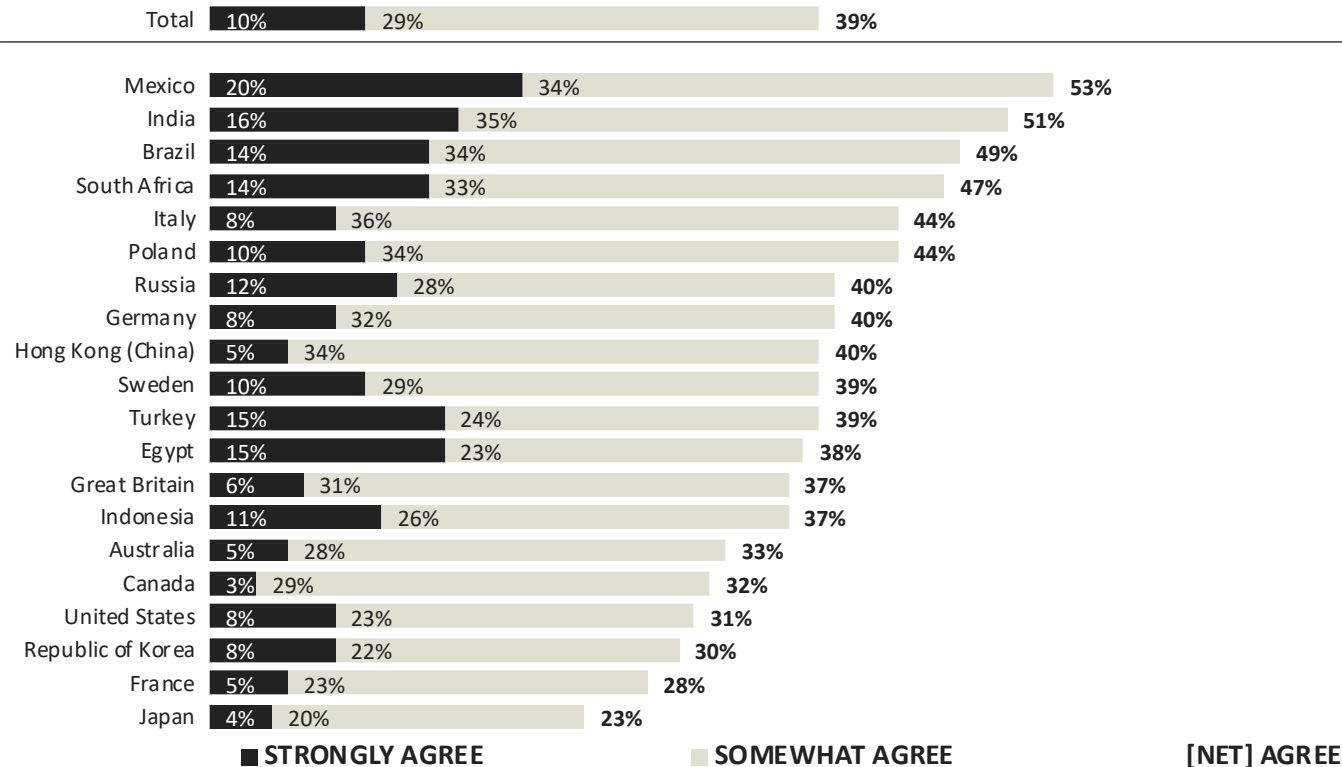
IT DOES NOT BOTHER ME THAT MY DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

Citizens in developing economies, such as LATAM & BRICS, tend to be less bothered by the fact that their personal data may sometimes leave their economy.



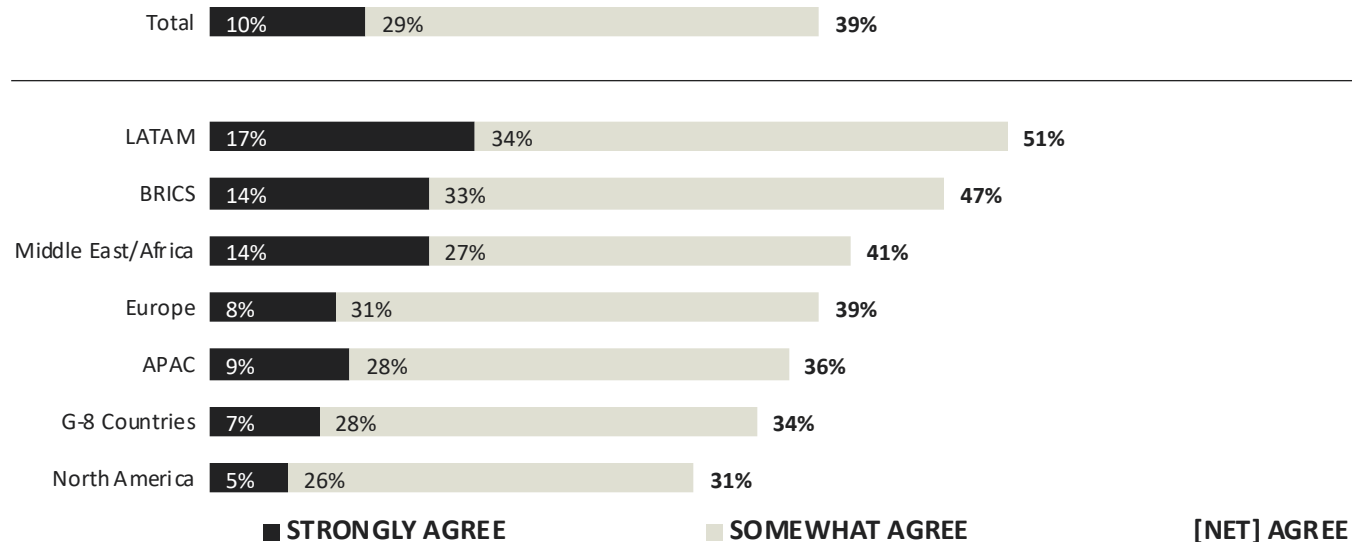
IT DOES NOT BOTHER ME THAT THE DATA OF FIRMS IN MY ECONOMY SOMETIMES GOES OUTSIDE OF MY ECONOMY

Globally, two in five (39%) *agree* that they are not bothered by the fact that sometimes the data of firms in their economy goes outside of their economy. With the exception of Mexico (53%) & India (51%), however, less than half in all other economies *agree* with this statement.



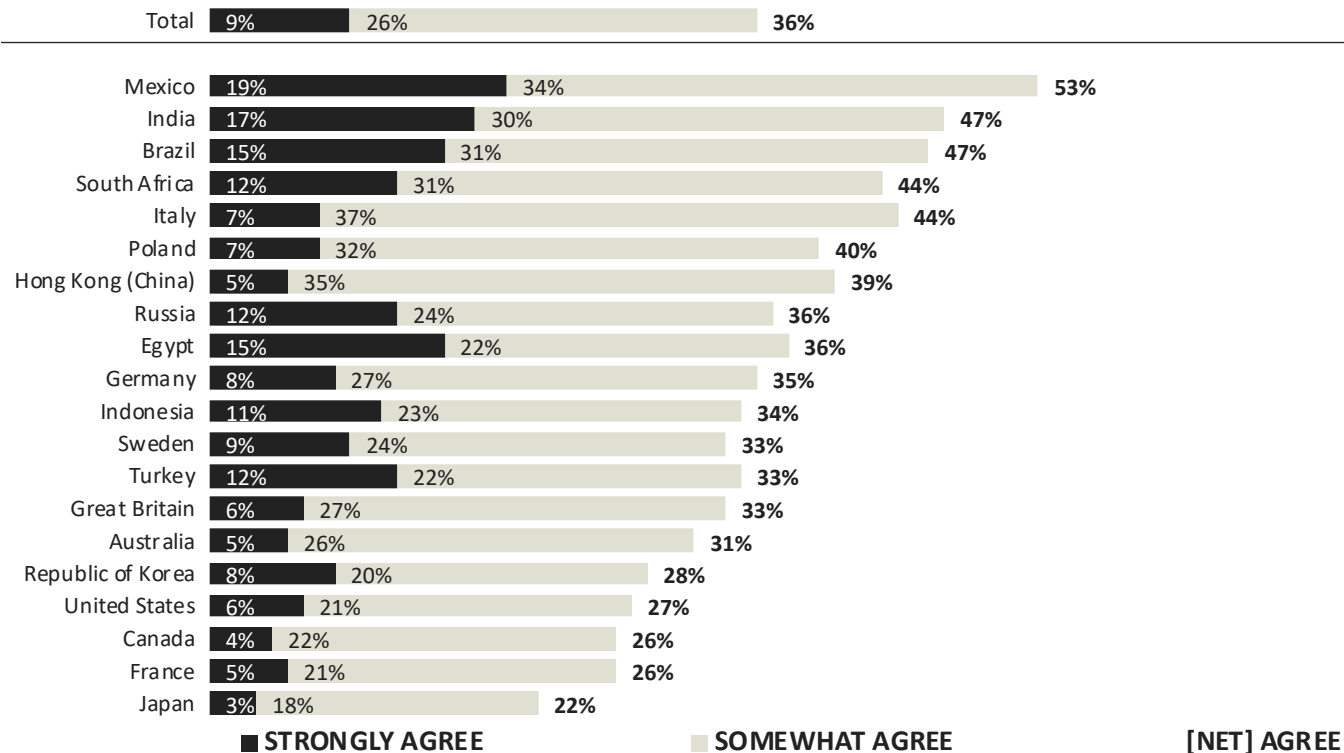
IT DOES NOT BOTHER ME THAT THE DATA OF FIRMS IN MY ECONOMY SOMETIMES GOES OUTSIDE OF MY ECONOMY

Aside from the LATAM region, fewer than half in all other economies *agree* that they are not bothered by the fact that sometimes data from firms in their economy goes outside of their economy.



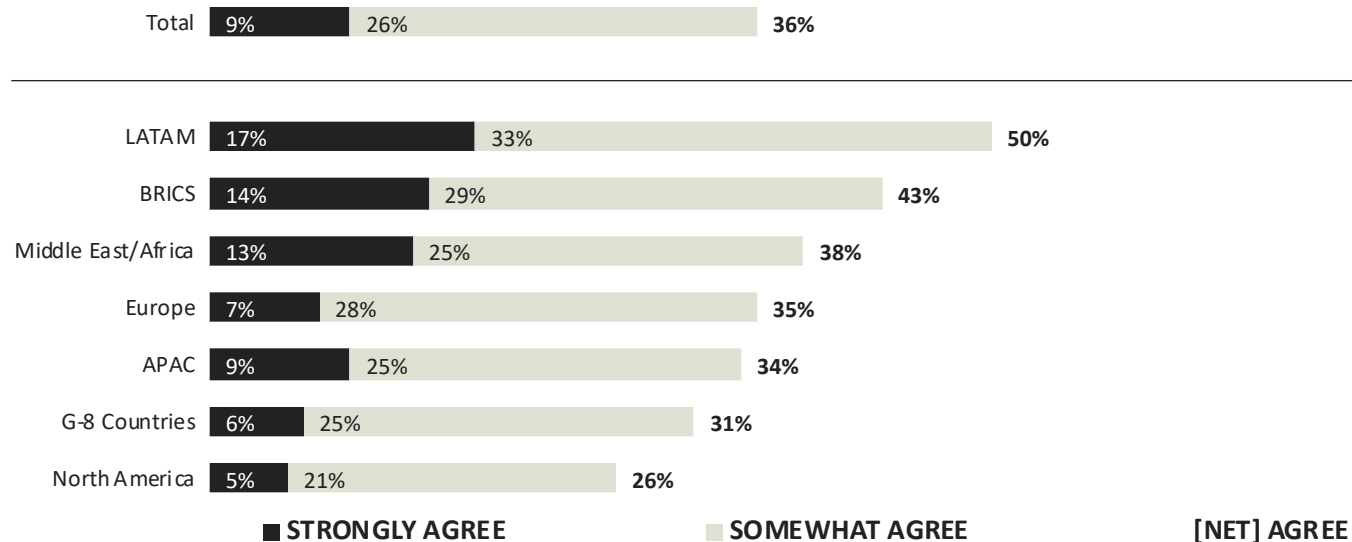
IT DOES NOT BOTHER ME THAT MY GOVERNMENT'S DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

Overall, just over one in three (36%) *agree* that they are not bothered by the fact that their government's data sometimes leaves the economy. At 53%, however, Mexico is the only economy in which a majority agrees with this statement.



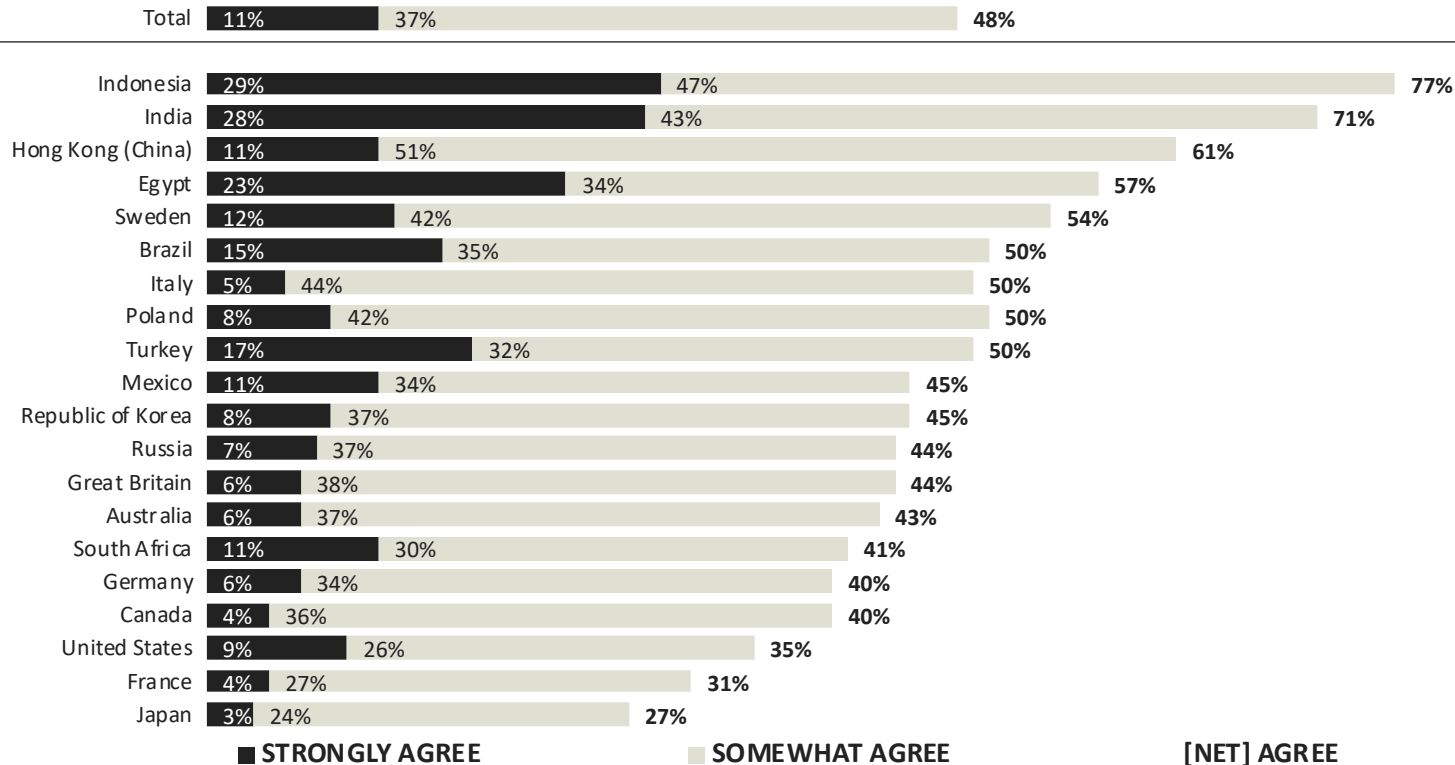
IT DOES NOT BOTHER ME THAT MY GOVERNMENT'S DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

Within the Americas, those residing in the LATAM region are twice as likely, compared to their neighbours in North America (50% vs. 26%), to *agree* that they are not bothered if their government's data sometimes leaves the economy.



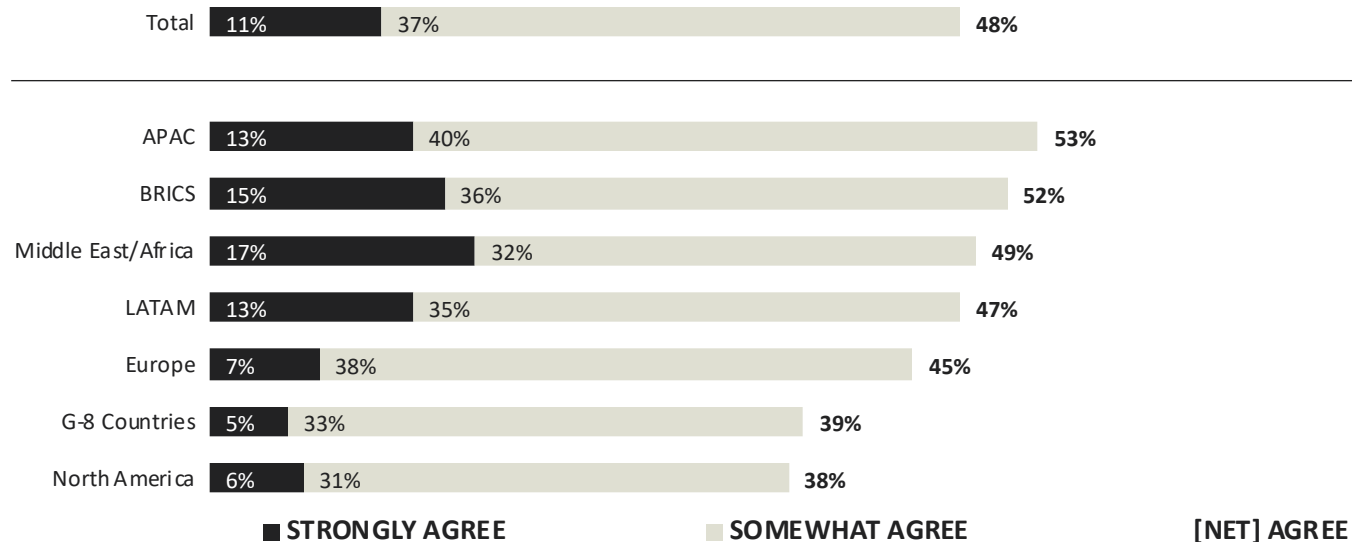
MY GOVERNMENT DOES ENOUGH TO PROTECT MY DATA

On average, just under half (48%) of global citizens *agree* that their government does enough to protect their data, though there is considerable variation by economy, with as many as three quarters (77%) of Indonesians and as few as one in four (27%) Japanese agreeing with this statement.



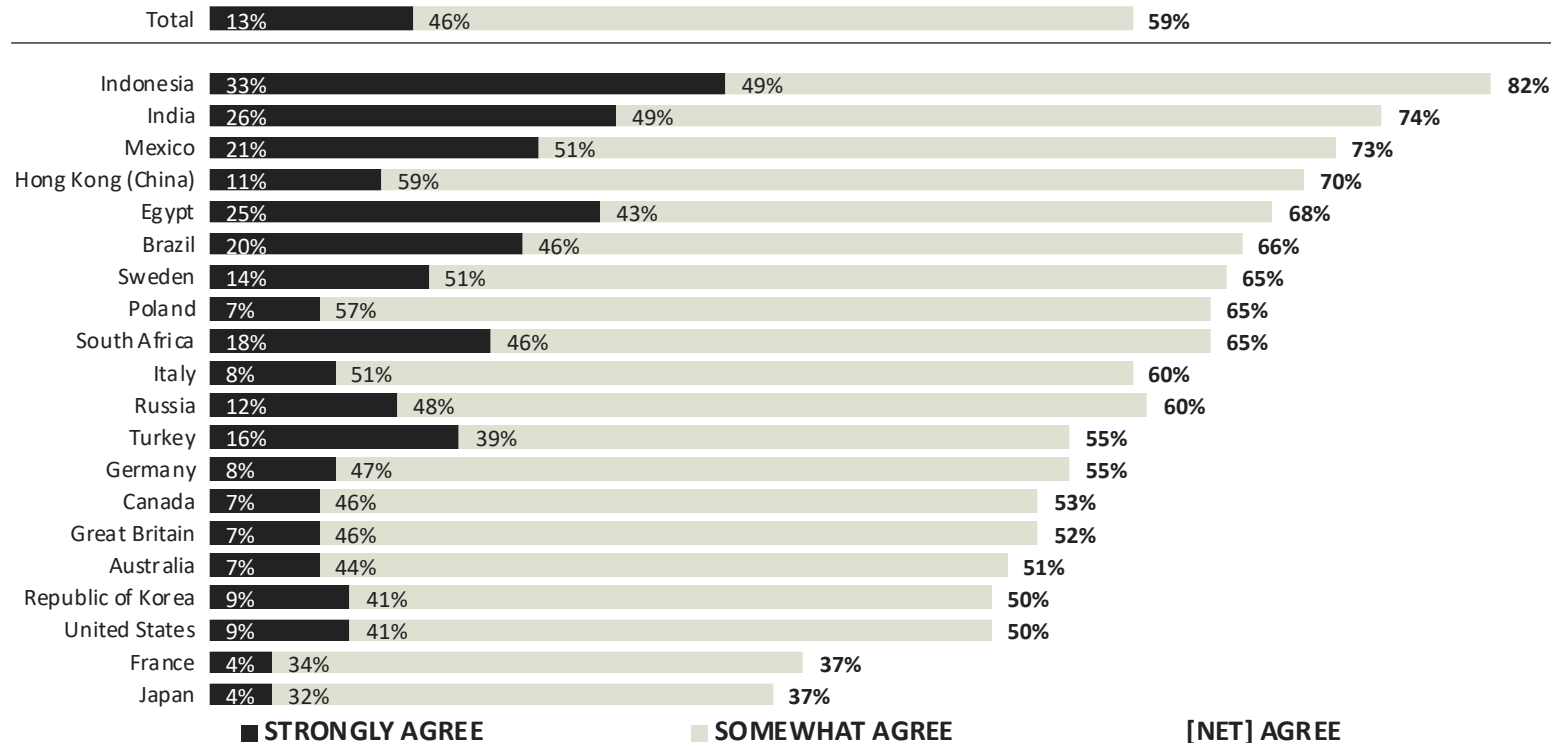
MY GOVERNMENT DOES ENOUGH TO PROTECT MY DATA

Majorities in the APAC & BRICS economies *agree* that their government does enough to protect their data. Aside from this, however, fewer than half in all other regions *agree* with this statement.



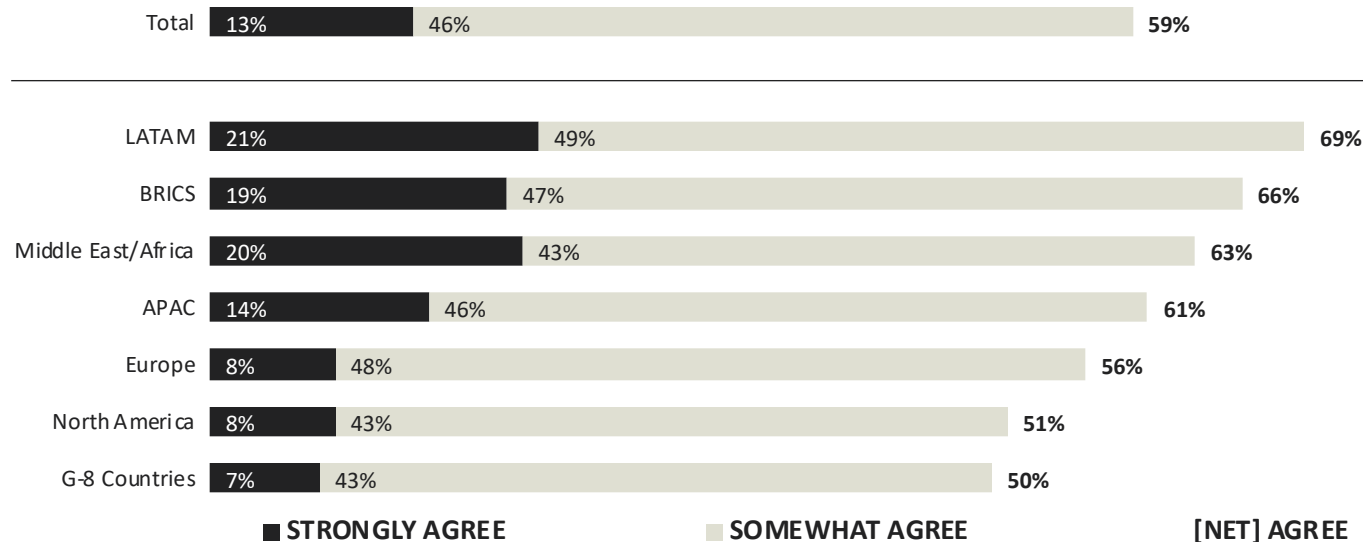
THE COMPANIES I USE DO ENOUGH TO PROTECT MY DATA

Three in five (59%) citizens globally would *agree* that the companies they use do enough to protect their data. In fact, with the exception of France & Japan (37% each), half or more agree with this statement in all other economies, including the vast majority (82%) in Indonesia, specifically.



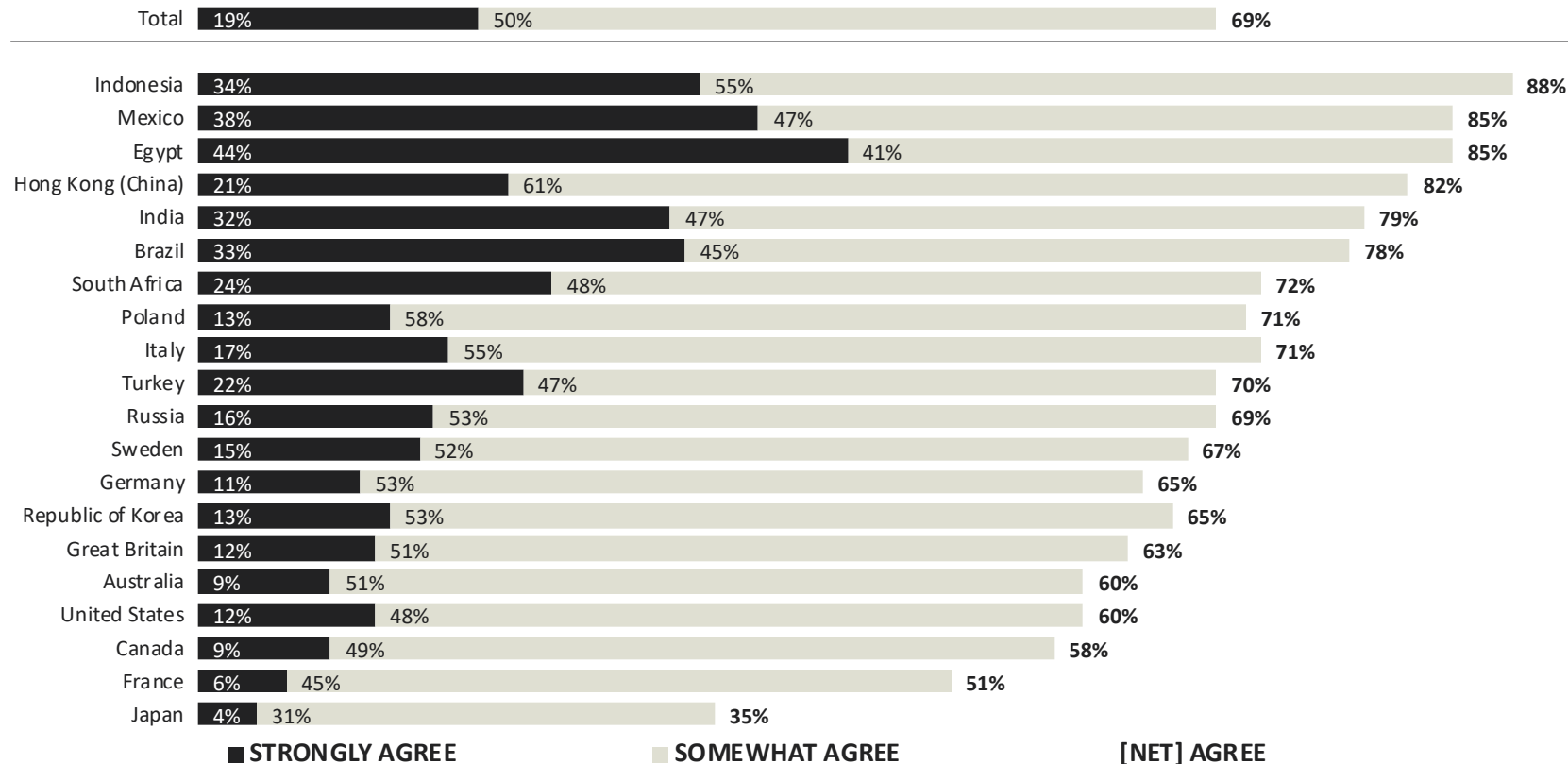
THE COMPANIES I USE DO ENOUGH TO PROTECT MY DATA

Citizens in less developed economies, such as LATAM, BRICS, the Middle East & Africa tend to be more likely to feel as though the companies they use protect their data, though half or more *agree* with this statement across all regions.



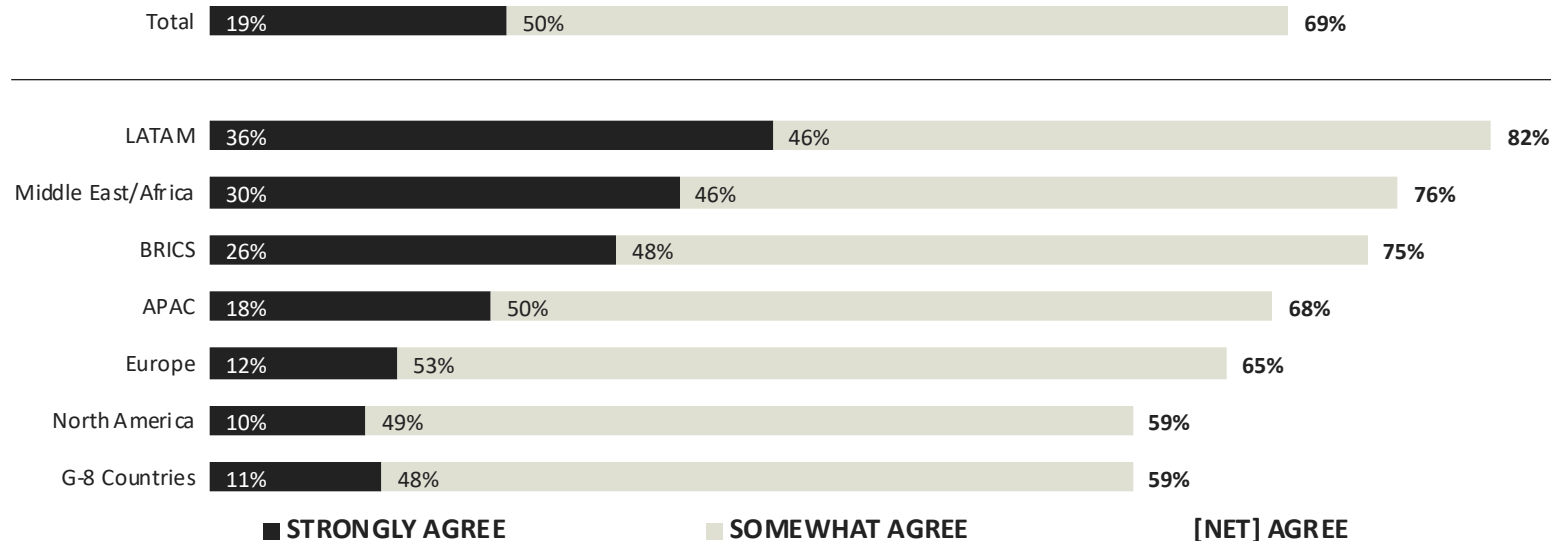
I DO ENOUGH TO PROTECT MY DATA

With the exception of Japan (at 35%), majorities in all other nations *agree* that they are doing enough to protect their data.



I DO ENOUGH TO PROTECT MY DATA

Citizens in less developed economies, particularly in the LATAM region, are generally more inclined to *agree* that they do enough to protect their own data.

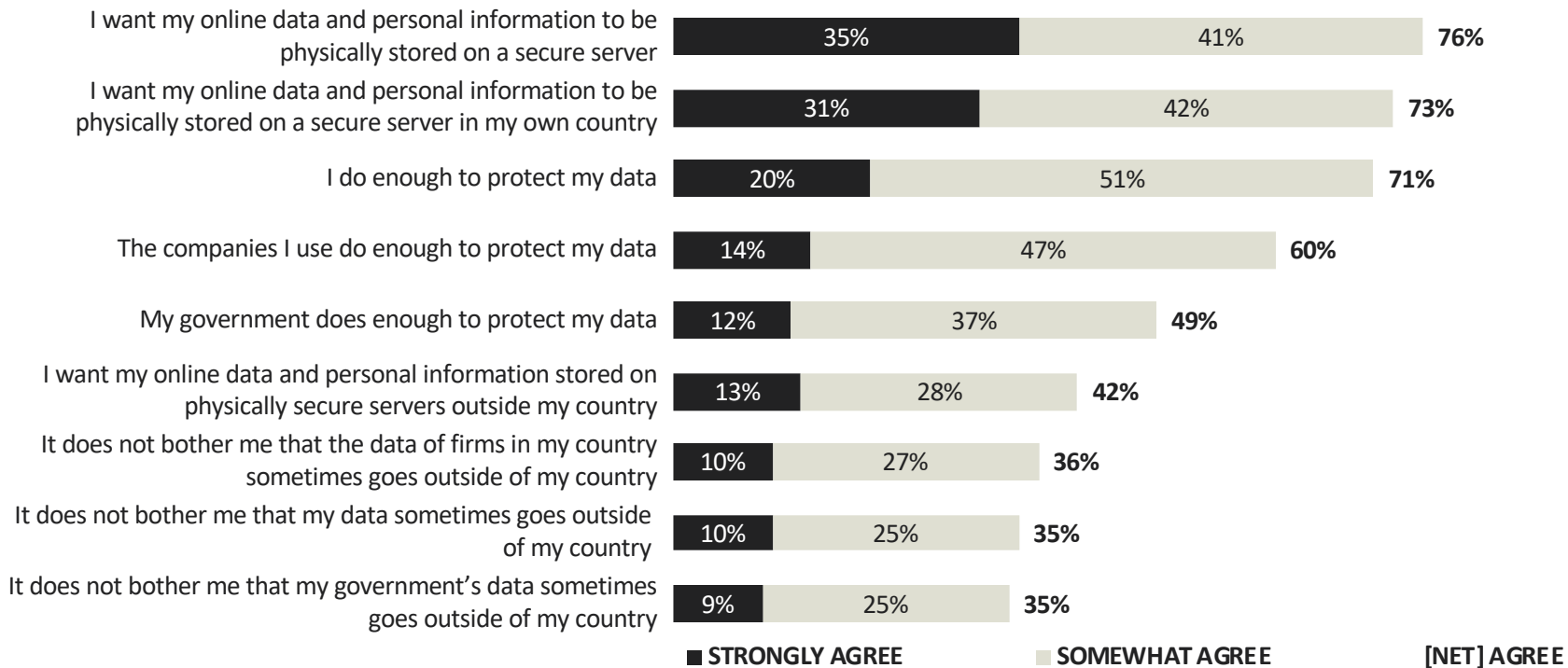




GROUP 1: NO TREATMENT

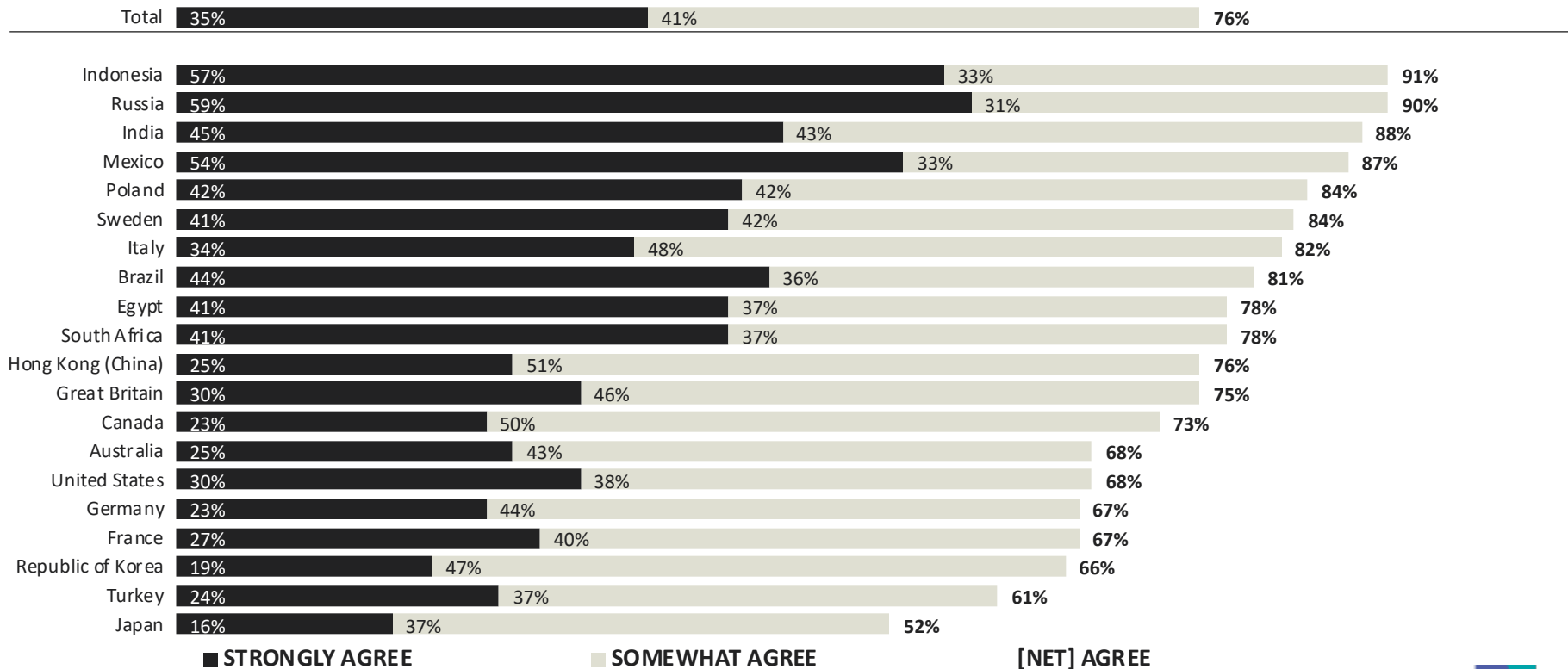


Unaided, three quarters want their data & personal information to be physically stored on a secure server (76%), in their own economy (73%). Slightly fewer (71%) think they do enough to protect their own data & most (60%) *agree* that the companies they use do enough. Half (49%) agree that their government does enough, while considerably fewer *agree* that they are bothered by cross-border data flows.



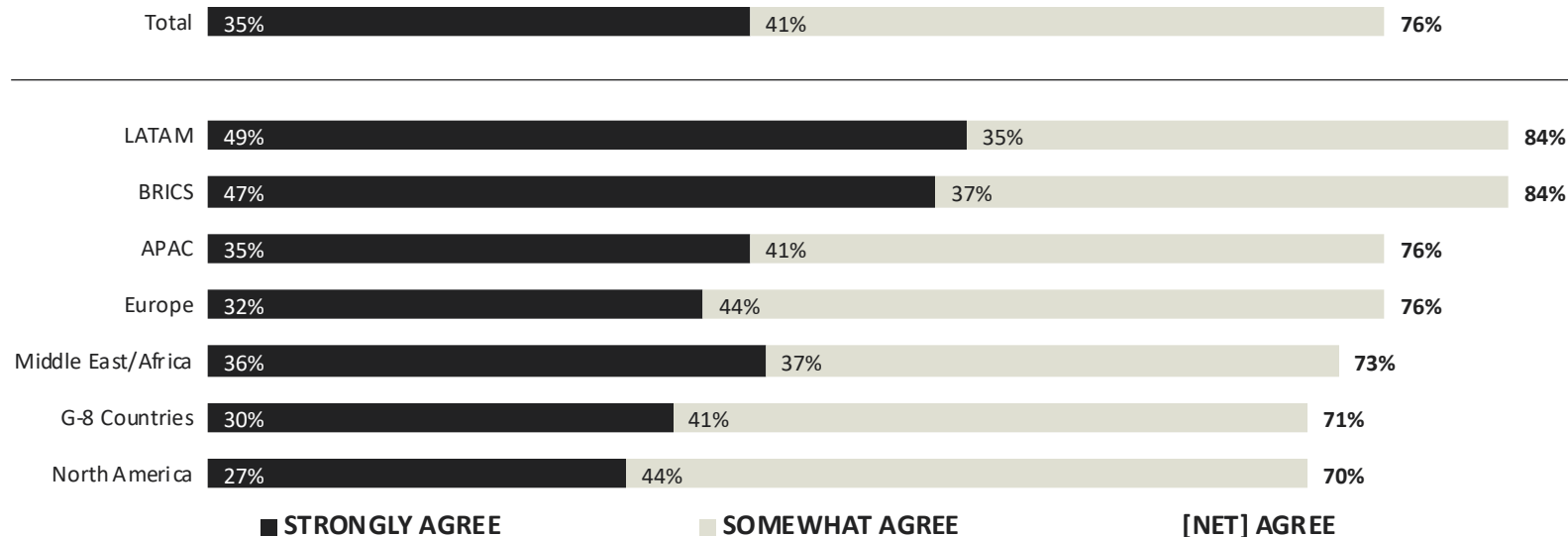
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER

Without treatment, three in four (76%) global citizens *agree* that they would like their data & personal information to be physically stored on a secure server, ranging from highs of nine in ten in Russia (90%) & Indonesia (91%) to just a slim majority (52%) in Japan.



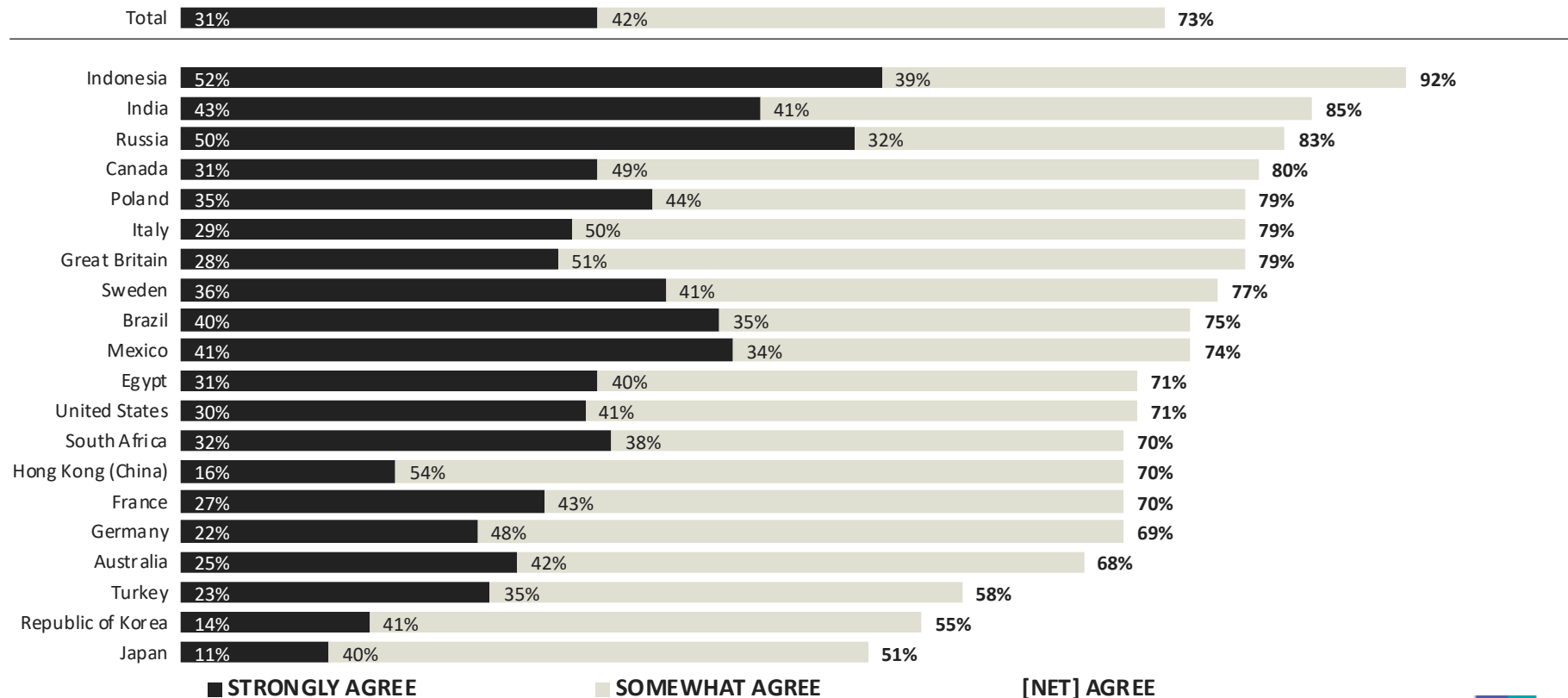
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER

Well over four in five (84%) citizens in the LATAM & BRICS economies *agree* that they would like their online data & personal information to be physically stored on a secure server, by far the highest proportion, regionally, among those who receive no treatment.



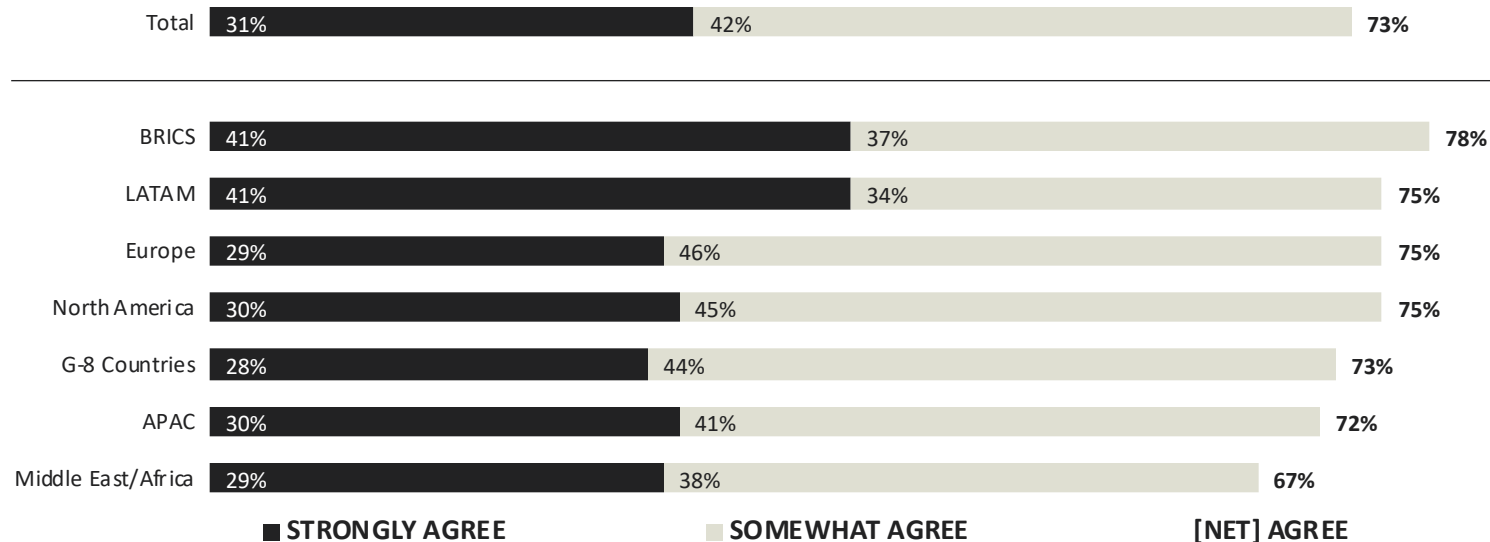
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER IN MY OWN ECONOMY

Majorities in all economies *agree* that they would like to have their online data & personal information physically stored on secure servers in their own economy, ranging from a high of 92% in Indonesia to a low of 51% in Japan.



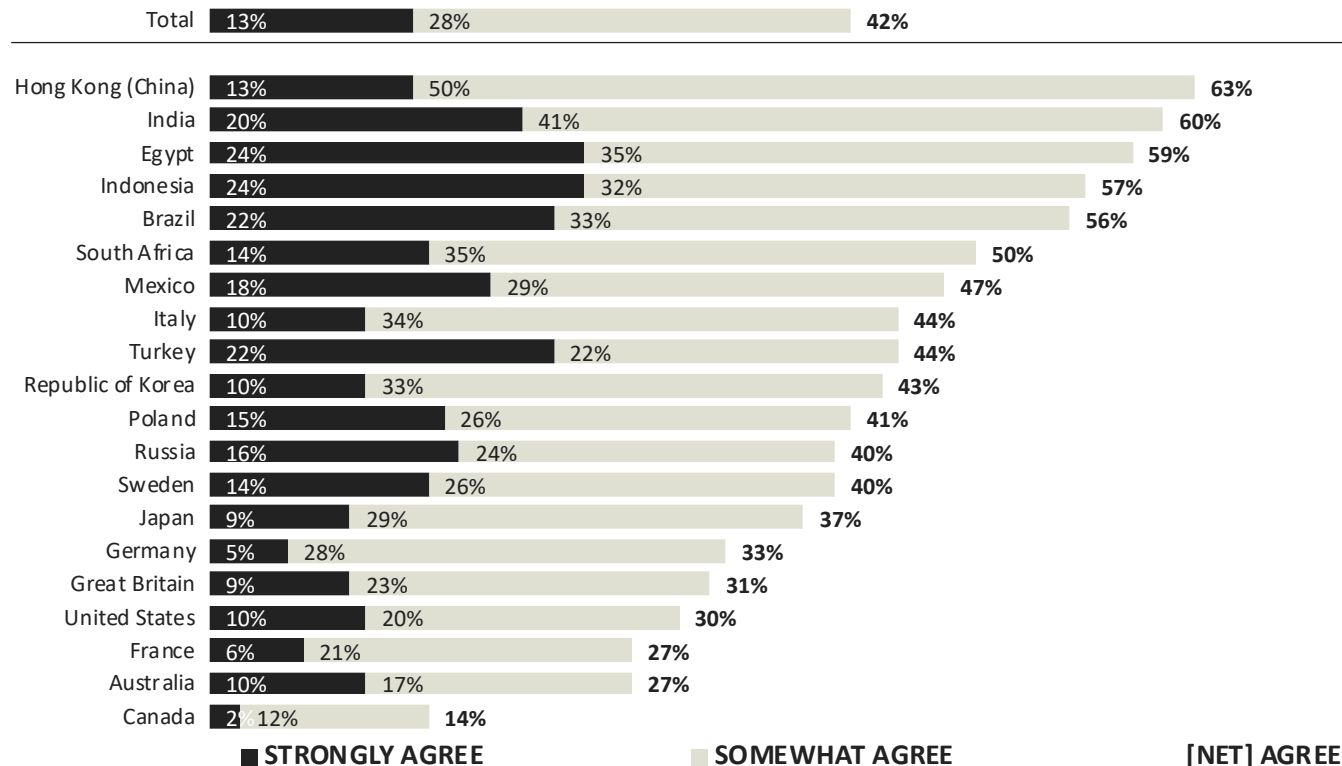
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER IN MY OWN ECONOMY

Regionally, there is limited variation, as between two in three and three in four of those who do not receive treatment *agree* that they would like their online data & personal information to be physically stored on a secure server in their own economy.



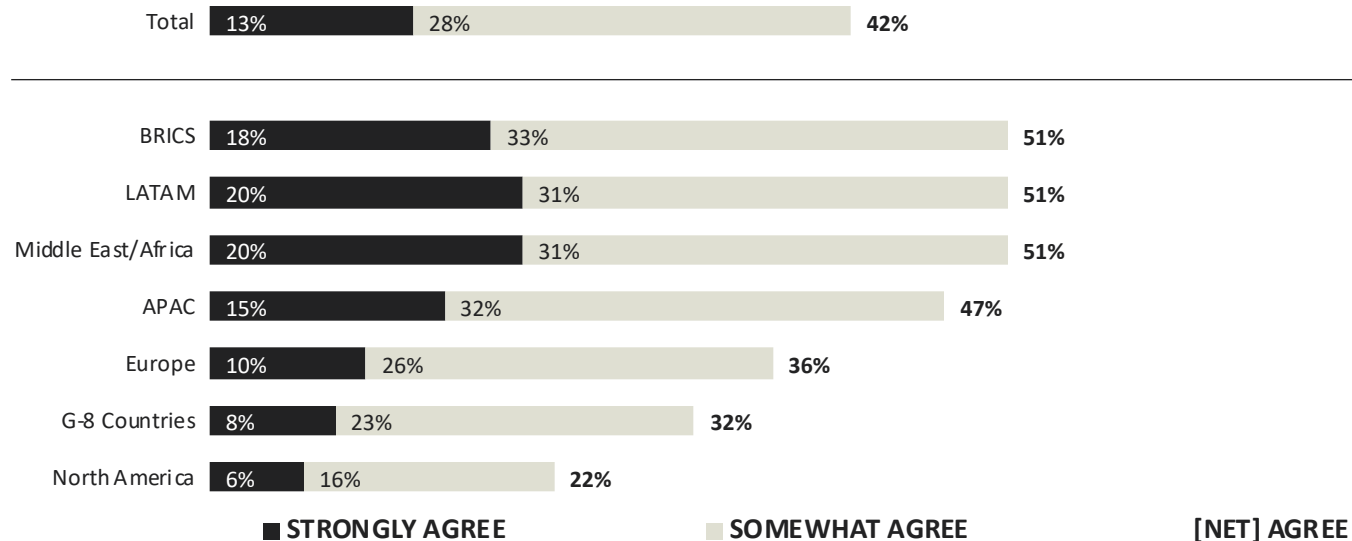
I WANT MY ONLINE DATA AND PERSONAL INFORMATION STORED ON PHYSICALLY SECURE SERVERS OUTSIDE MY ECONOMY

Overall, just two in five (42%) of those who are untreated *agree* that they would like to have their data & personal information stored on servers outside of their economy, ranging from a high of 63% in Hong Kong (China) to a low of 14% in Canada.



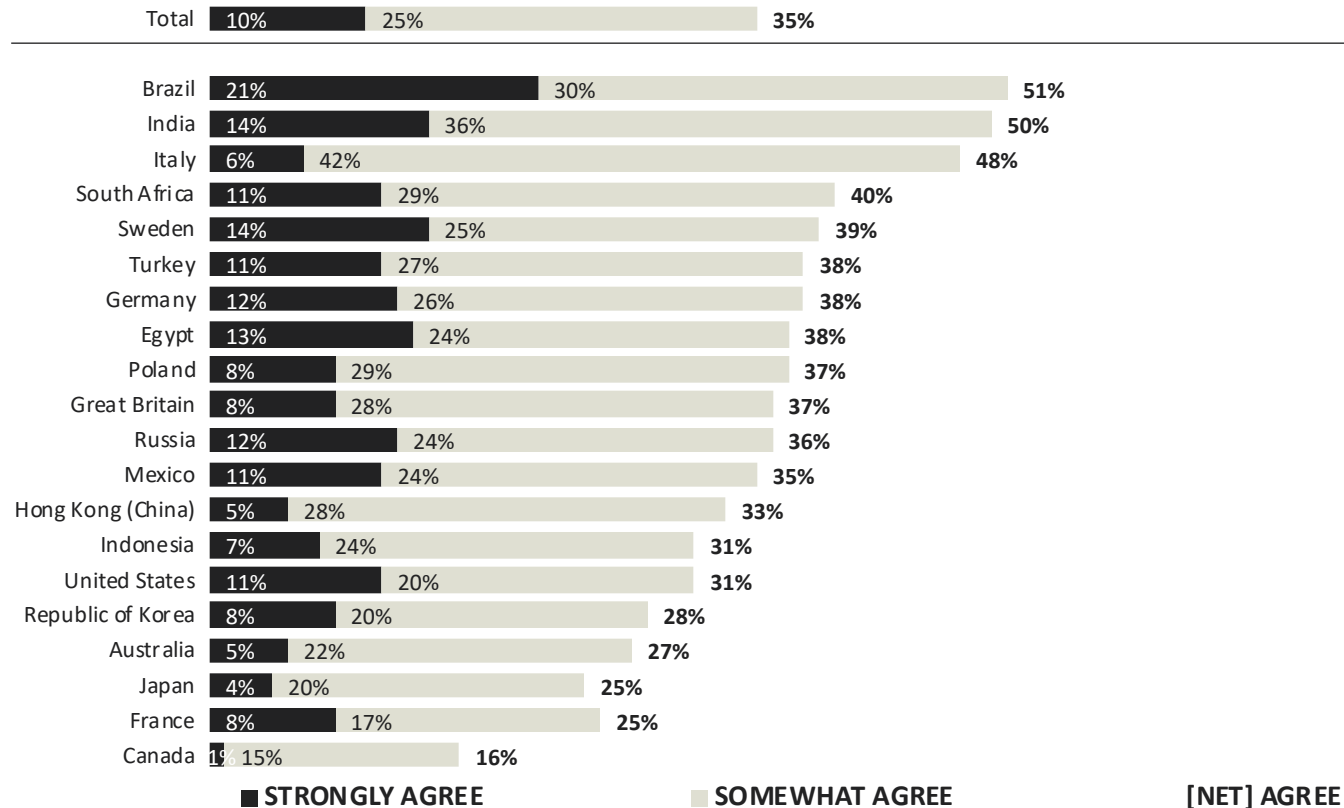
I WANT MY ONLINE DATA AND PERSONAL INFORMATION STORED ON PHYSICALLY SECURE SERVERS OUTSIDE MY ECONOMY

Majorities in less developed economies, such as BRICS, LATAM, the Middle East & Africa want to have their data stored on physical servers outside of their economies while considerably fewer in the developed world would like to have this.



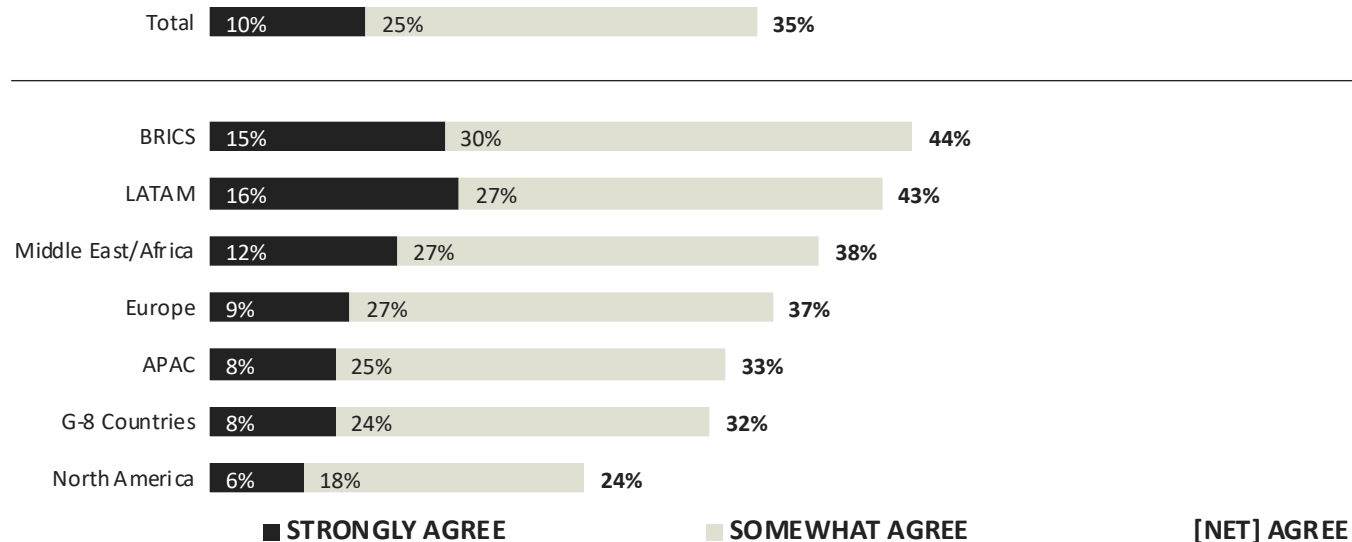
IT DOES NOT BOTHER ME THAT MY DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

Fewer than half in all economies, save for Brazil & India, *agree* that they are not bothered by the fact that their data sometimes leaves their economy. Canadians are the most bothered by this.



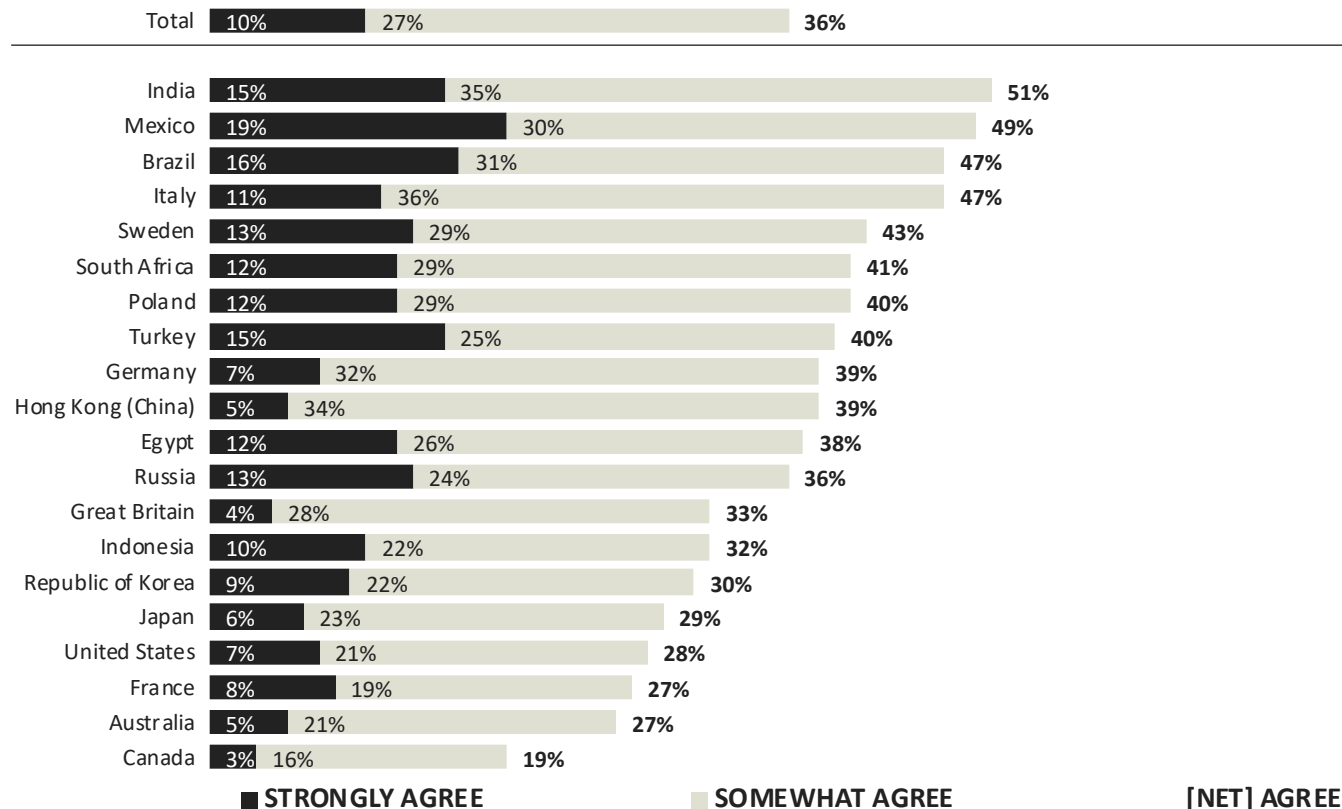
IT DOES NOT BOTHER ME THAT MY DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

Half as many North Americans *agree*, compared to those in BRICS & LATAM economies, that it does not bother them that their data sometimes leaves the economy.



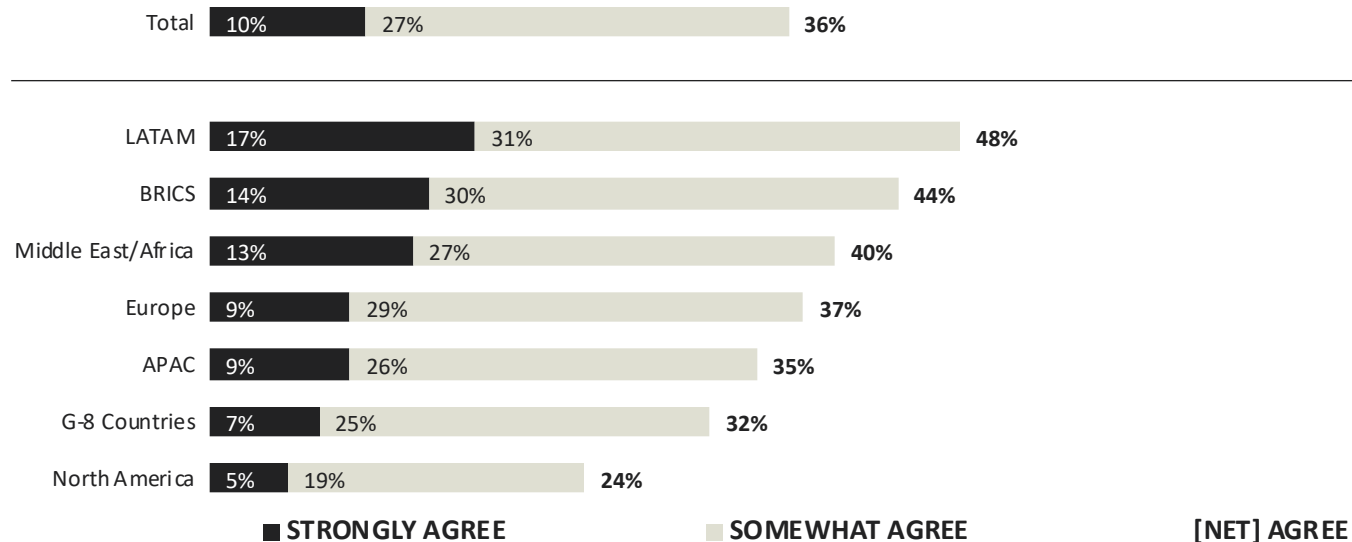
IT DOES NOT BOTHER ME THAT THE DATA OF FIRMS IN MY ECONOMY SOMETIMES GOES OUTSIDE OF MY ECONOMY

With the exception of India (at 51%), fewer than half in all other economies *agree* that they are not bothered if the data of firms in their economy sometimes goes outside of their economy.



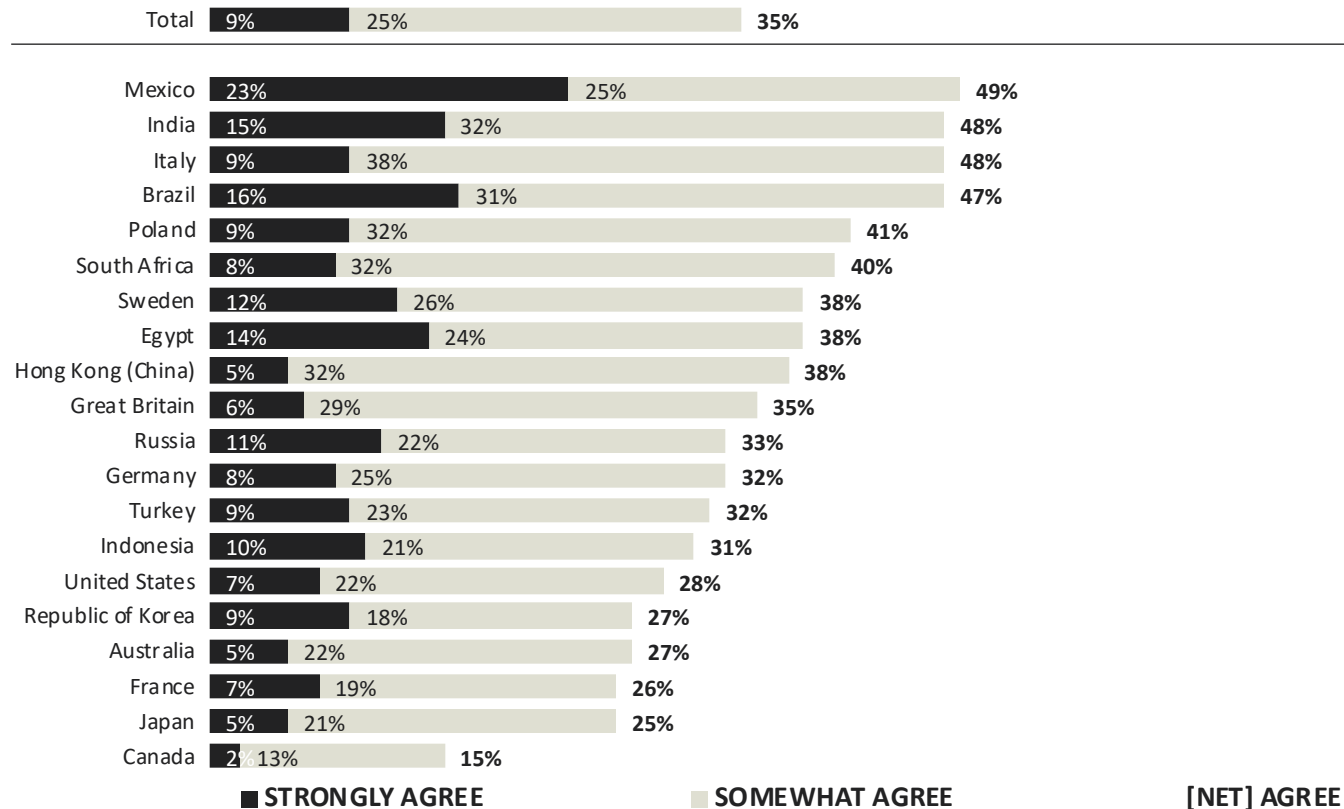
IT DOES NOT BOTHER ME THAT THE DATA OF FIRMS IN MY ECONOMY SOMETIMES GOES OUTSIDE OF MY ECONOMY

Unaided, citizens in LATAM economies are twice as likely, compared those in North America, to *agree* that they are not bothered if the data of firms in their economy goes outside of the economy.



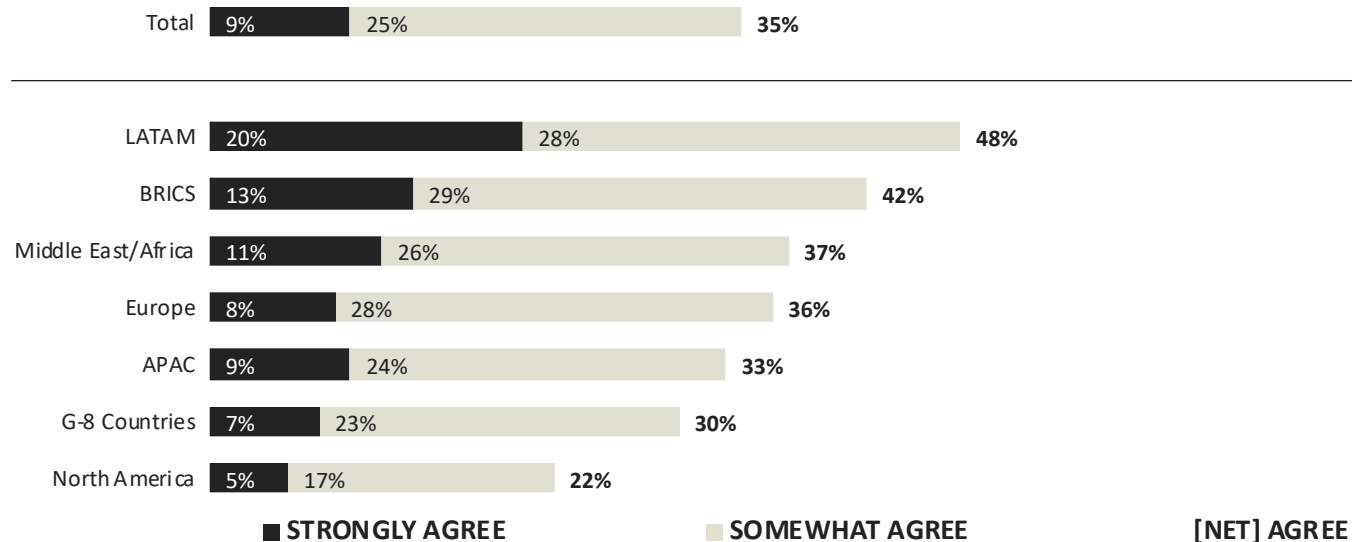
IT DOES NOT BOTHER ME THAT MY GOVERNMENT'S DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

Globally, one in three (35%) of those who do not receive any treatments *agree* that they are not bothered if their government's data sometimes leaves the economy.



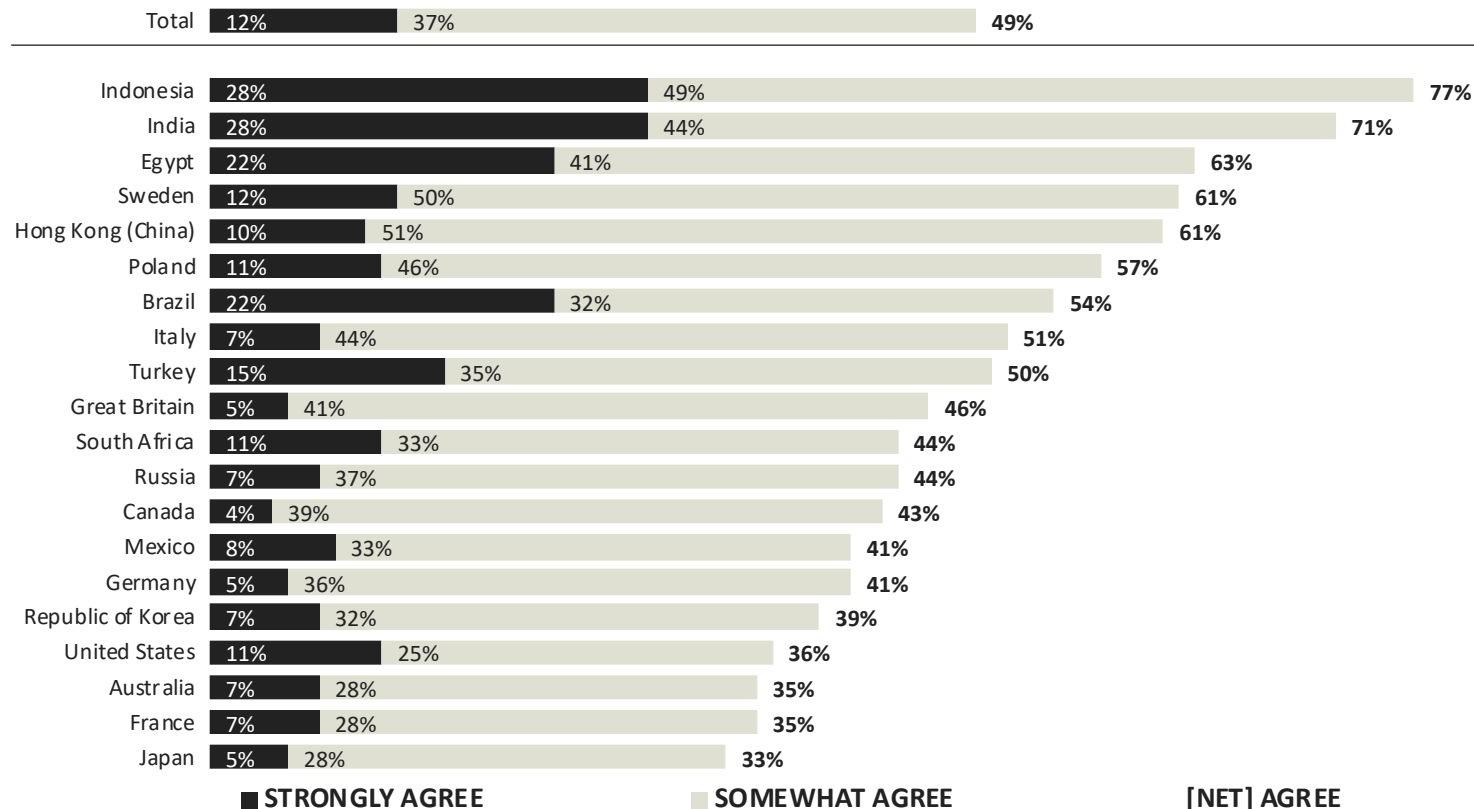
IT DOES NOT BOTHER ME THAT MY GOVERNMENT'S DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

Similarly, citizens in LATAM economies are twice as likely, compared those in North America, to *agree* that they are not bothered by government data leaving their economy.



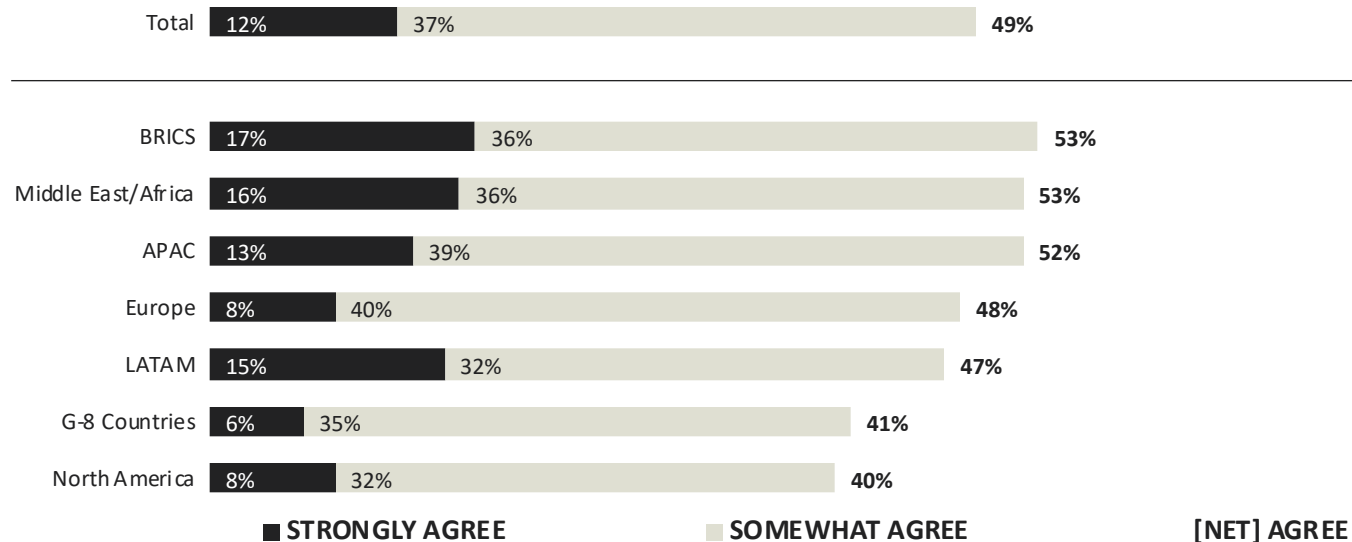
MY GOVERNMENT DOES ENOUGH TO PROTECT MY DATA

Unaided, half (49%) of global citizens think their government does enough to protect their data, including as many as three in four (77%) in Indonesia and as few as one in three (33%) in Japan.



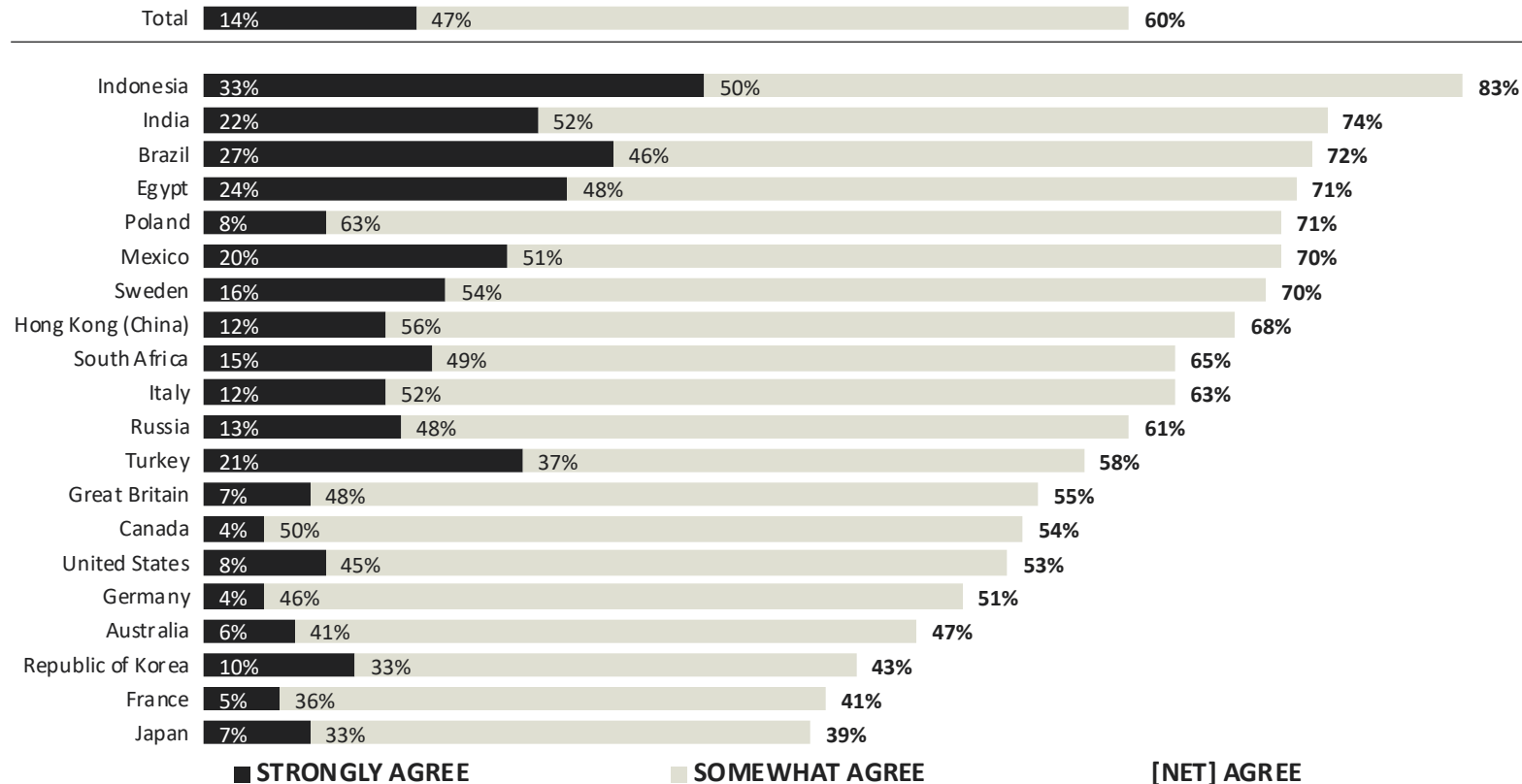
MY GOVERNMENT DOES ENOUGH TO PROTECT MY DATA

Majorities in the BRICS, APAC, Middle Eastern & African economies *agree* that their government does enough, to protect their data. However, less than half in all other economies *agree* with this statement.



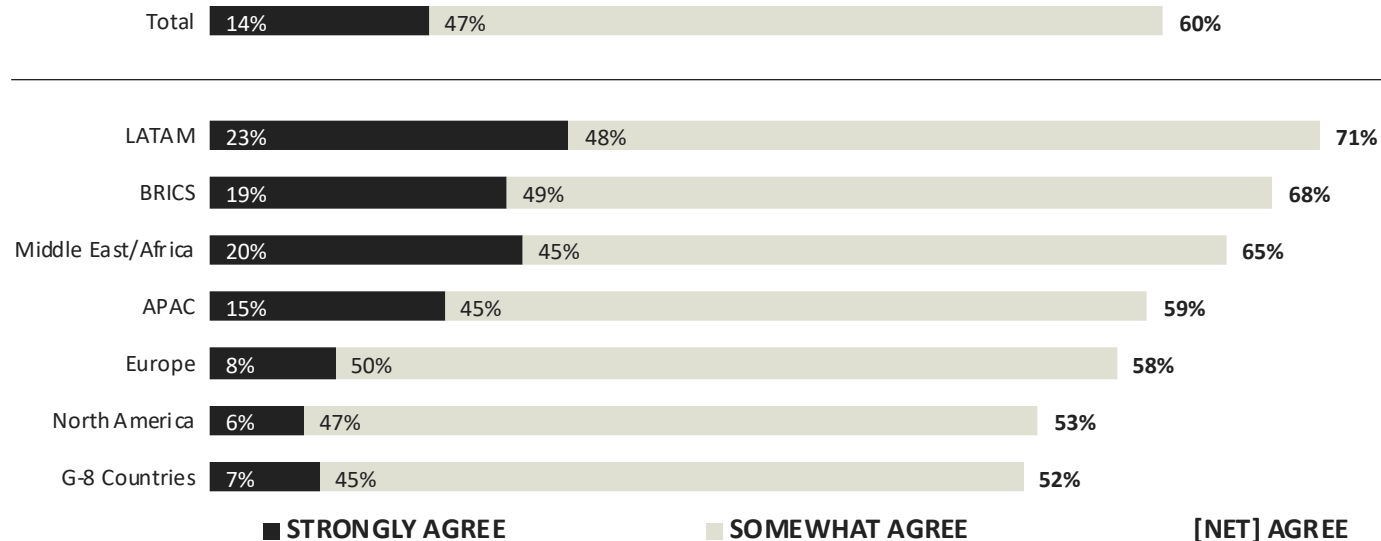
THE COMPANIES I USE DO ENOUGH TO PROTECT MY DATA

Three in five (60%) global citizens presume, unaided, that the companies they use do enough to protect their data. Outside of Japan, France, the Rep. of Korea & Australia, majorities in all economies *agree* with this statement.



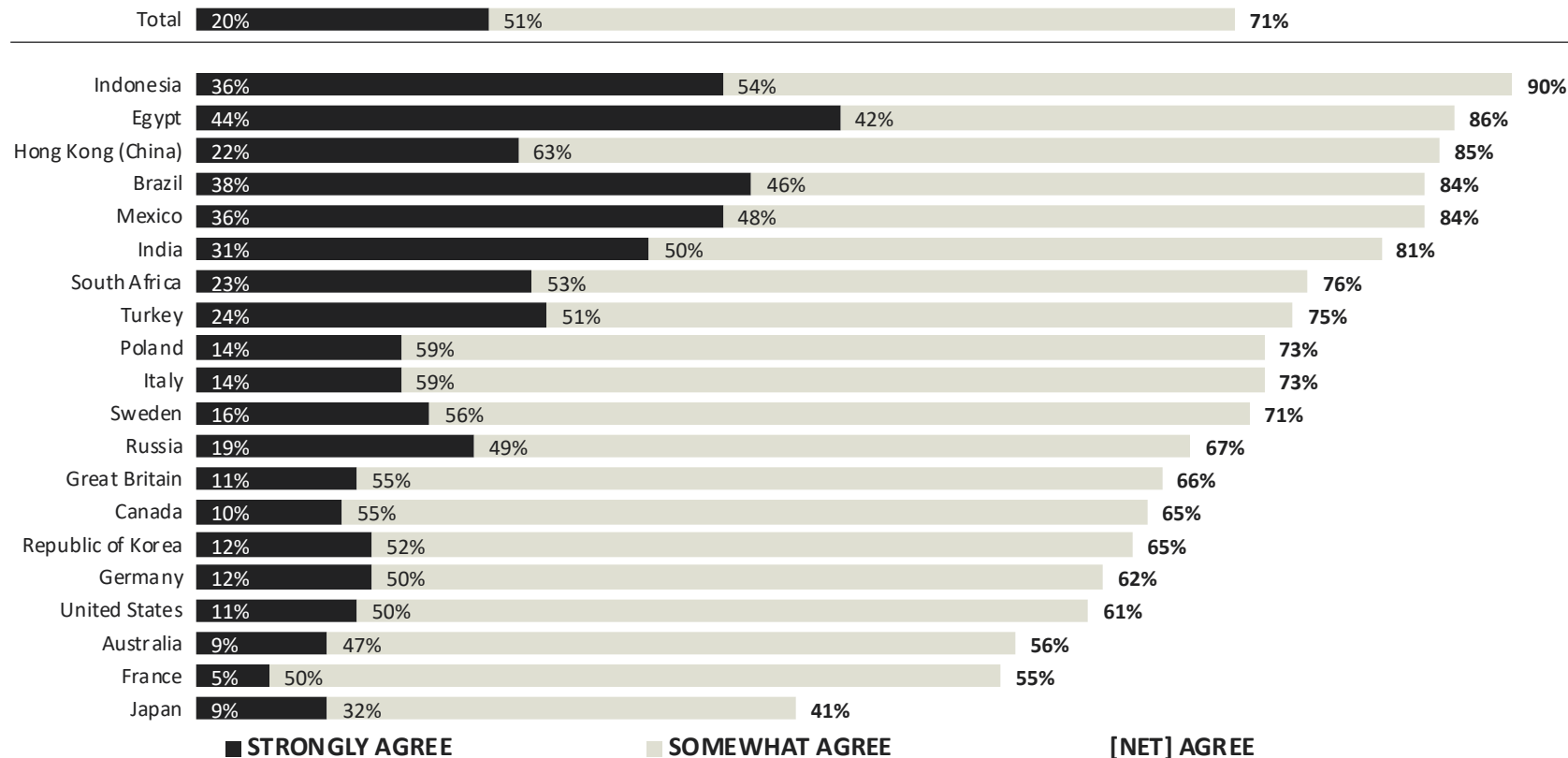
THE COMPANIES I USE DO ENOUGH TO PROTECT MY DATA

Majorities in all economies *agree* that the companies they are using do enough to protect their data, ranging from a high of 71% in LATAM to just over half in North America (53%) & the G-8 (52%).



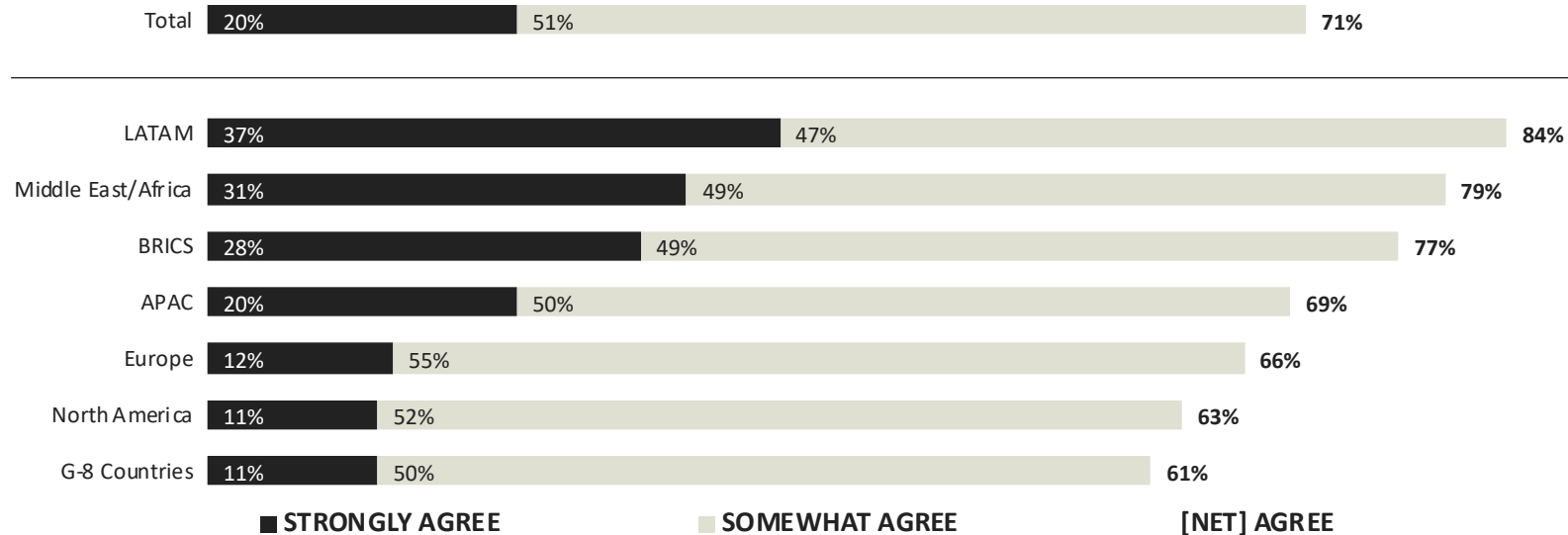
I DO ENOUGH TO PROTECT MY DATA

Unaided, seven in ten (71%) think that they do enough to protect their own data. In fact, with the exception of Japan, majorities in all economies feel this way.



I DO ENOUGH TO PROTECT MY DATA

Regardless of economy, most global citizens tend to think that they are doing enough to protect their own data.





GROUP 2: TREATMENT #1

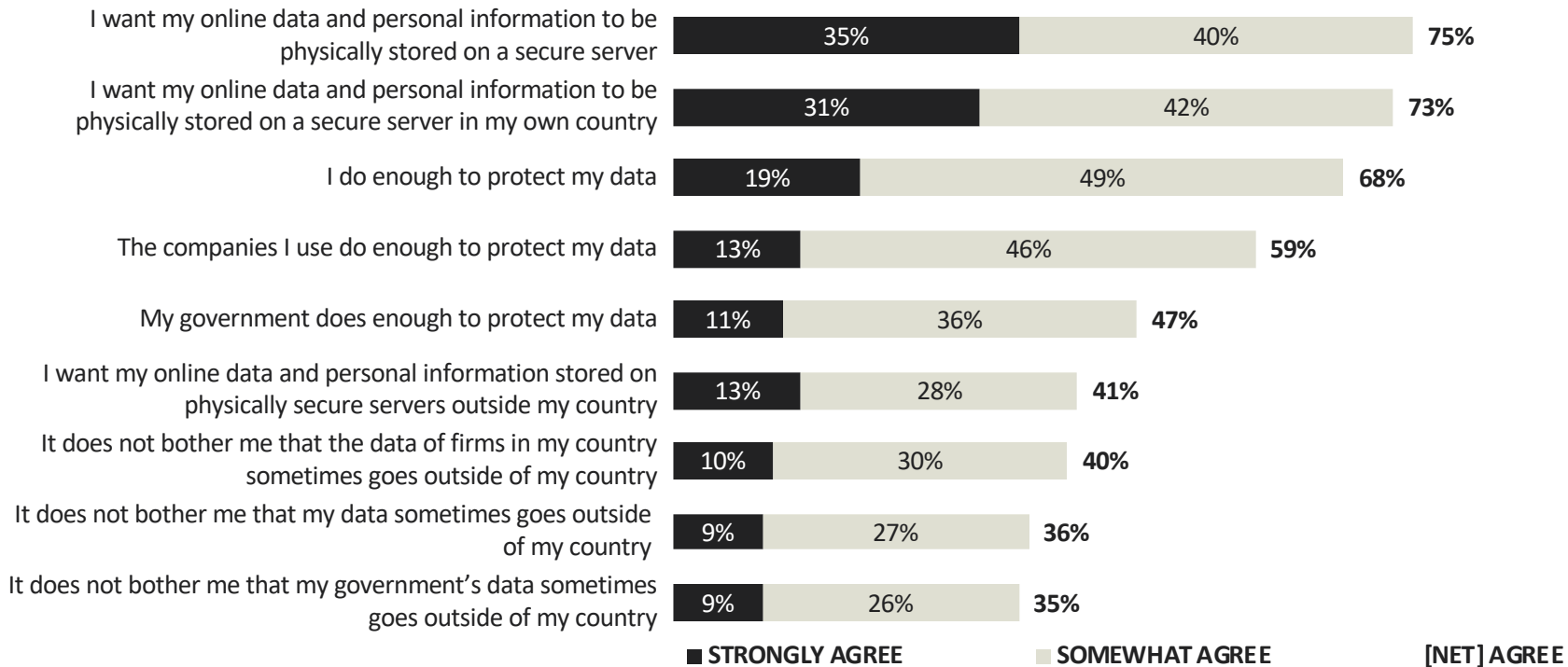
TREATMENT #1



Those who advocate for **FEWER restrictions** on data flowing across national borders *cite the following reasons why:*

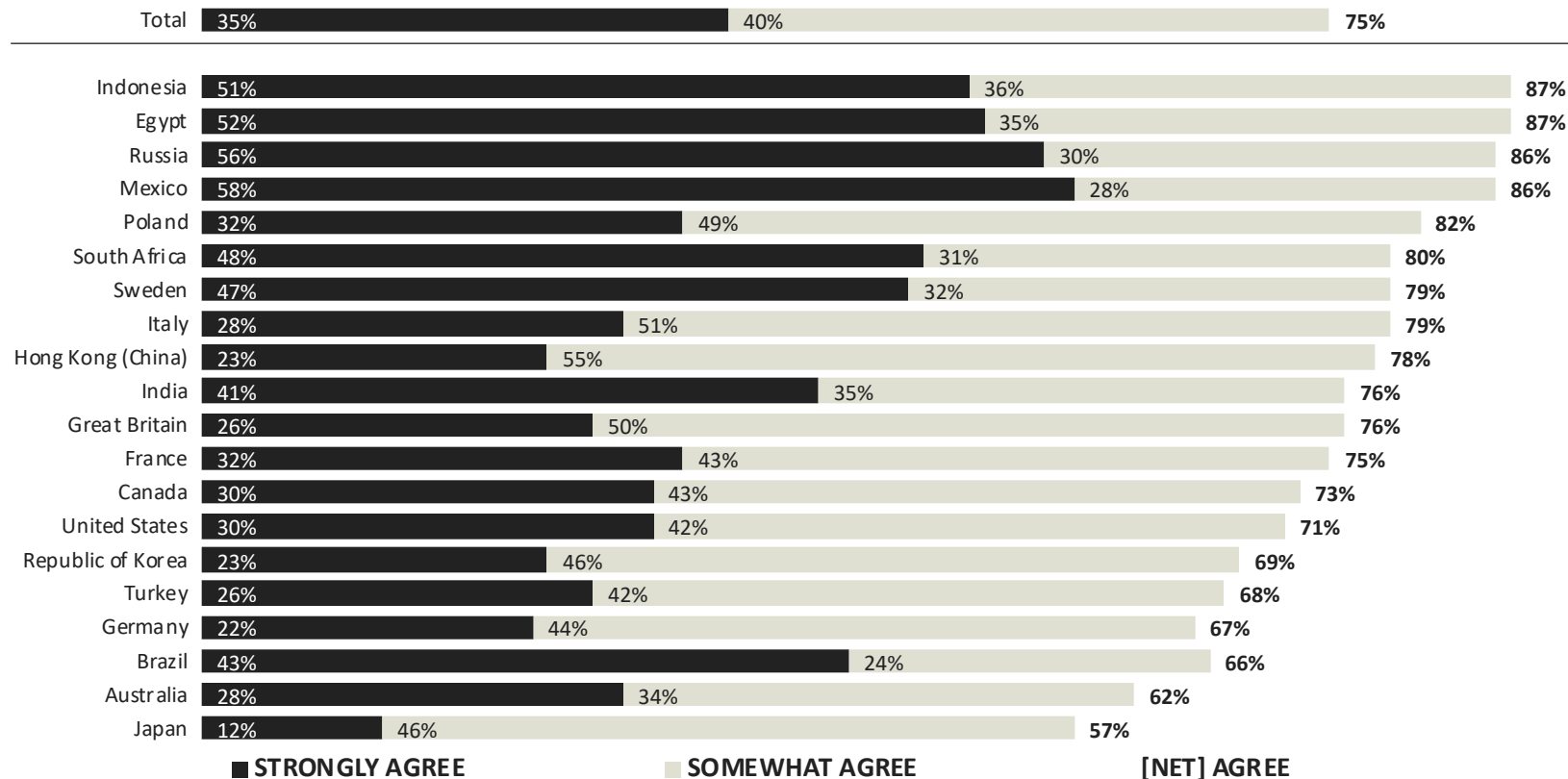
- ☐ Cross-border data flows are the engine of trade
- ☐ Cross-border data flows improve international service delivery
- ☐ Cross-border data flows are essential for innovation
- ☐ Cross-border data flows are essential for global business
- ☐ Cross-border data flows help small businesses participate in global markets
- ☐ Cross-border data flows increase access to global Internet platforms
- ☐ Cross-border data flows make it harder for my government to conduct surveillance

After exposure to arguments favouring fewer cross-border data restrictions, there is a drop in the proportion who believe that they (-3 pts) & their governments (-2) do enough to protect their data, relative to the untreated group. However, significantly more *agree* (+4) that they are not bothered by the fact that the data of firms in their economy sometimes goes outside the economy.



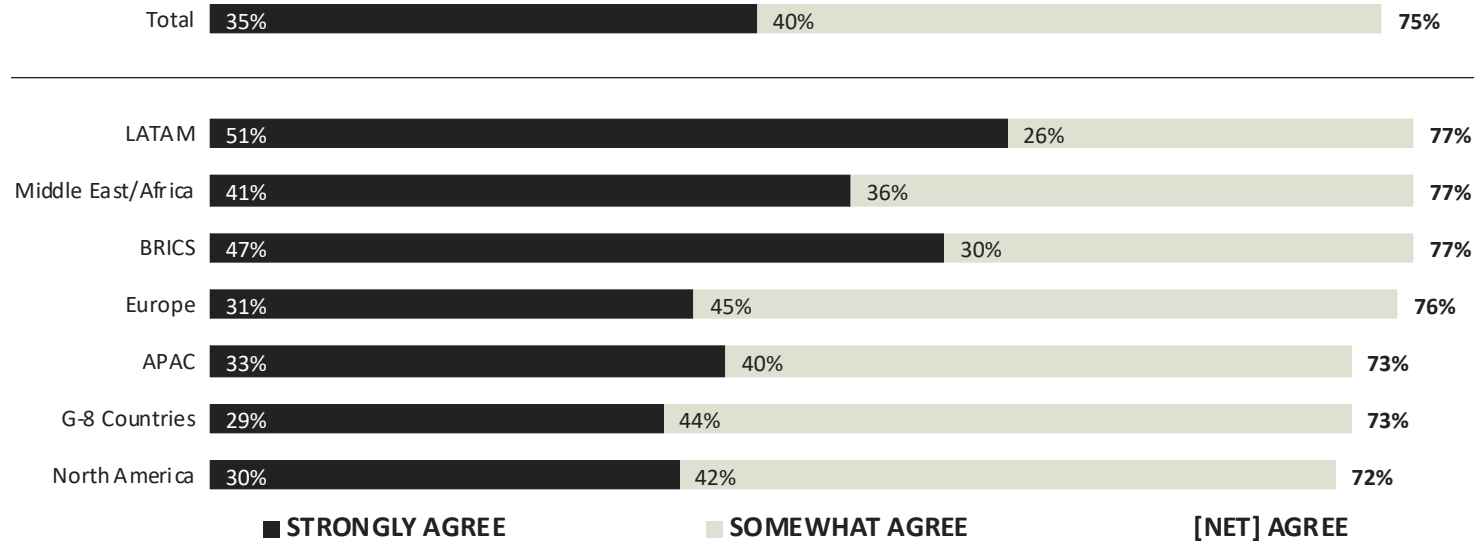
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER

After being exposed to materials that advocate fewer cross-border restrictions, the greatest shifts in opinion, relative to the untreated group, occur in Brazil (-15 pts) & India (-12 pts).



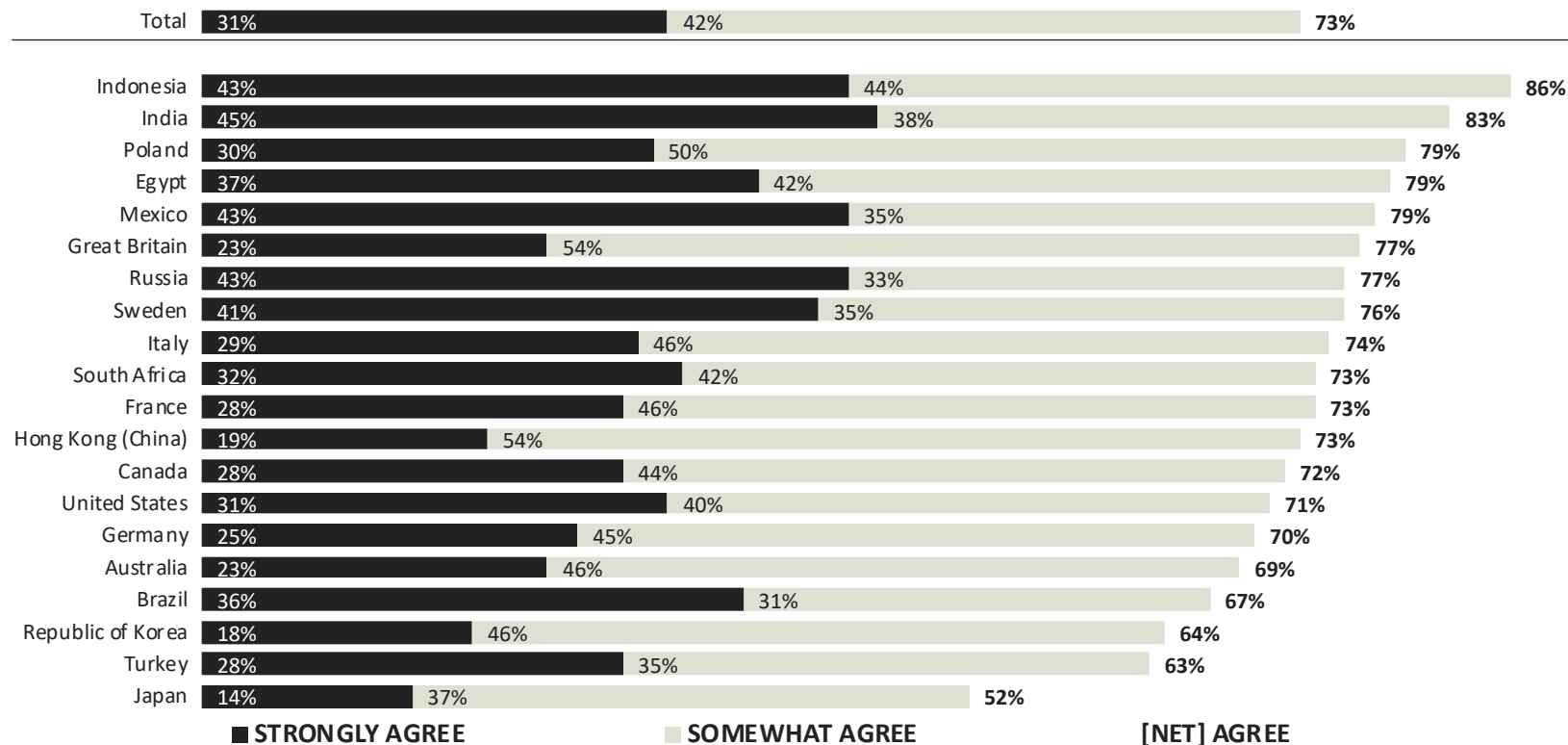
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER

Relative to the untreated group, the most notable shifts in opinion occur in the LATAM & BRICS economies (-7 pts, on both counts).



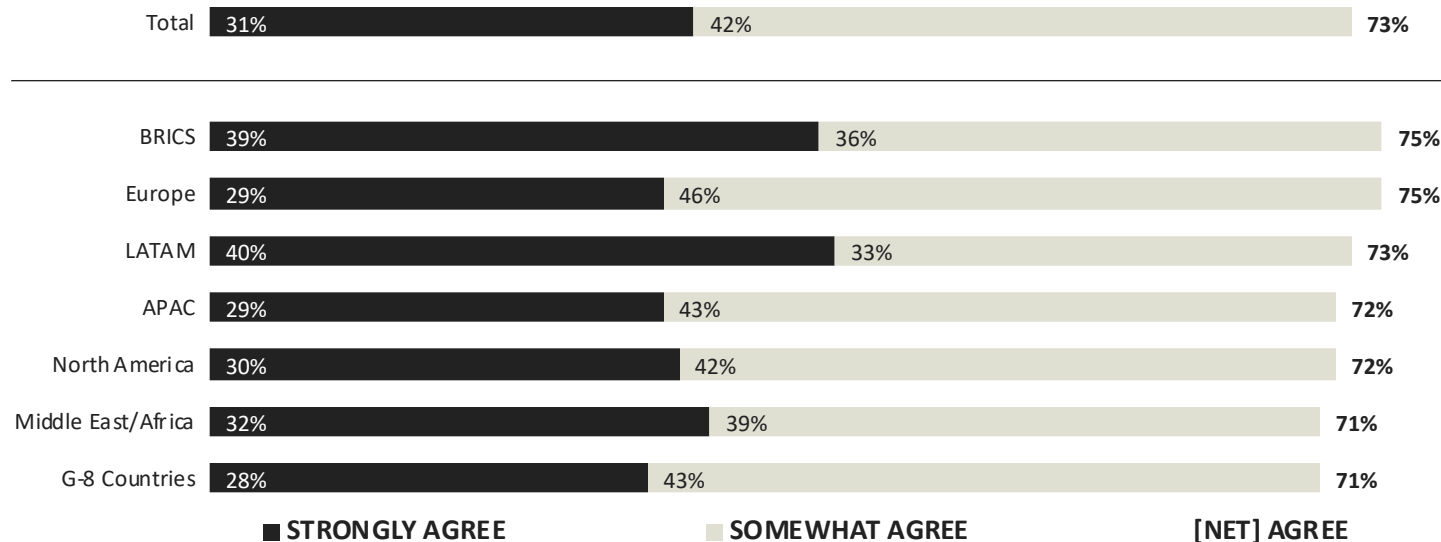
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER IN MY OWN ECONOMY

After being exposed to stimulus favouring fewer cross-border data restrictions, the greatest shifts in opinion occur in the Republic of Korea (+9 pts, vs. unaided), Egypt (+8), Canada (-8) & Brazil (-8).



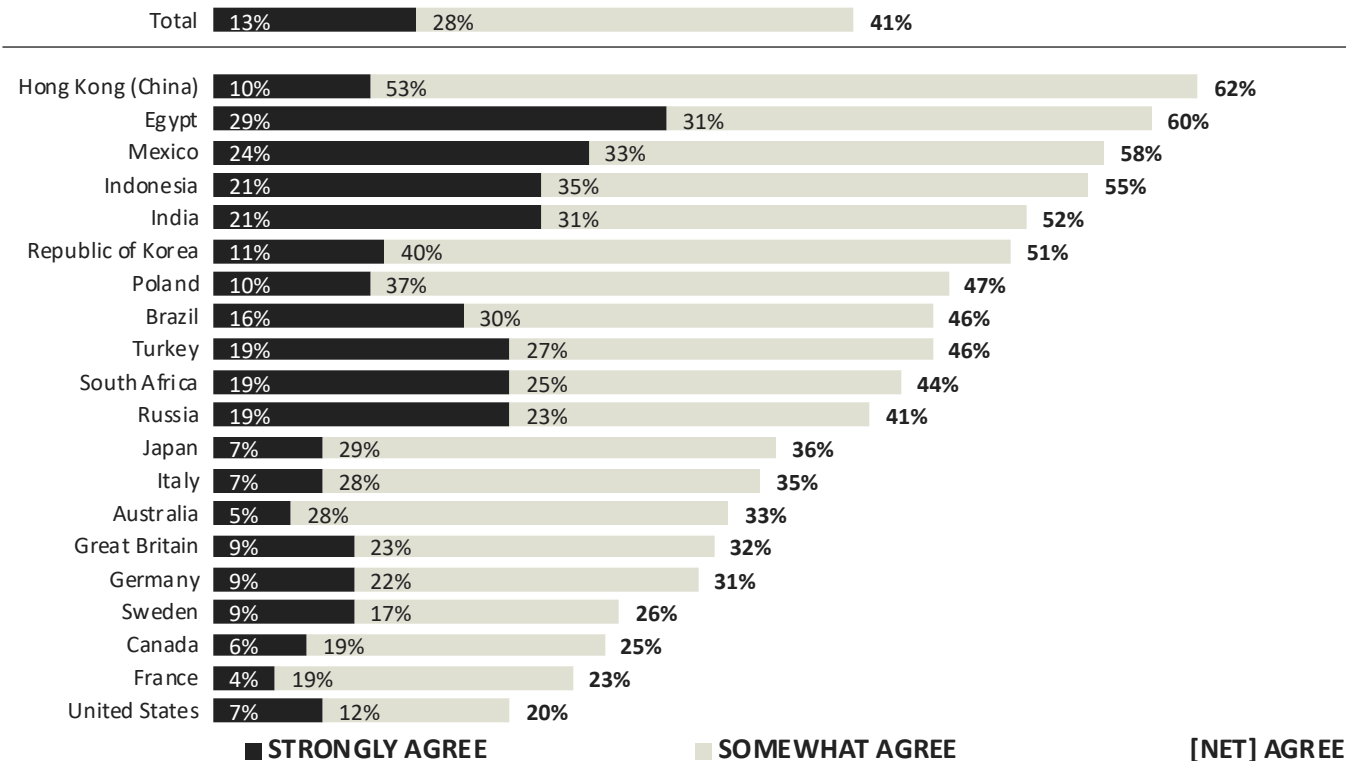
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER IN MY OWN ECONOMY

In comparison to the untreated group, the biggest shifts in opinion occur in the Middle Eastern & African economies (+4 pts, on both counts).



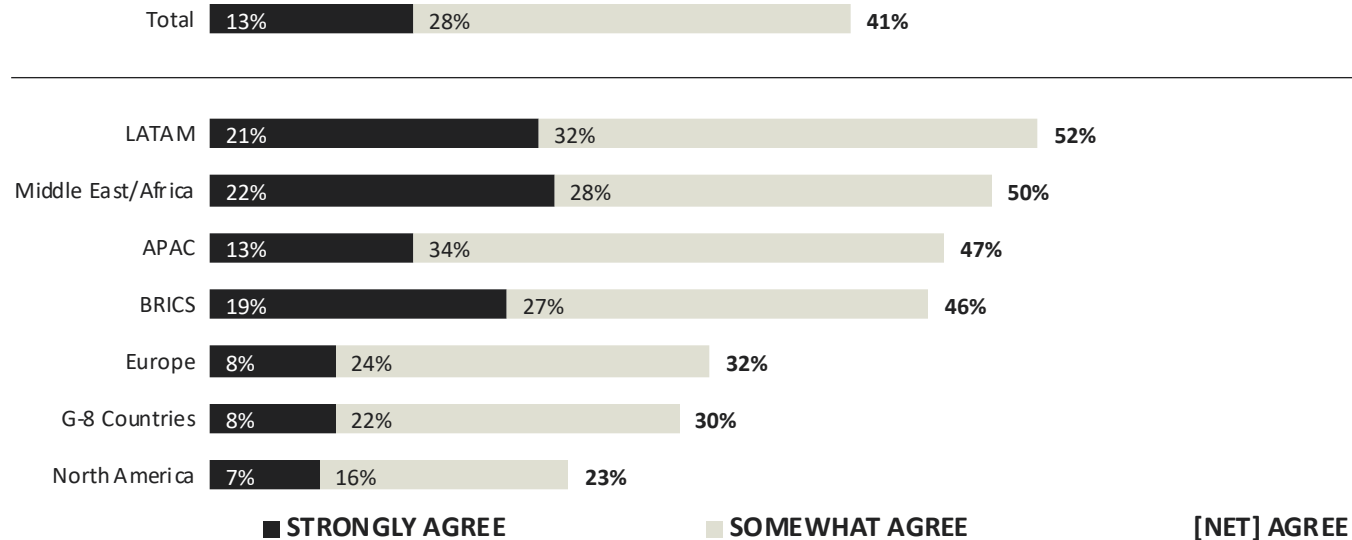
I WANT MY ONLINE DATA AND PERSONAL INFORMATION STORED ON PHYSICALLY SECURE SERVERS OUTSIDE MY ECONOMY

After exposure to arguments favouring reduced cross-border data restrictions, opinions have shifted both ways, with the most notable changes, relative to the untreated group, occurring in Sweden (-14 pts), Mexico (+11), Canada (+11) & Brazil (-10).



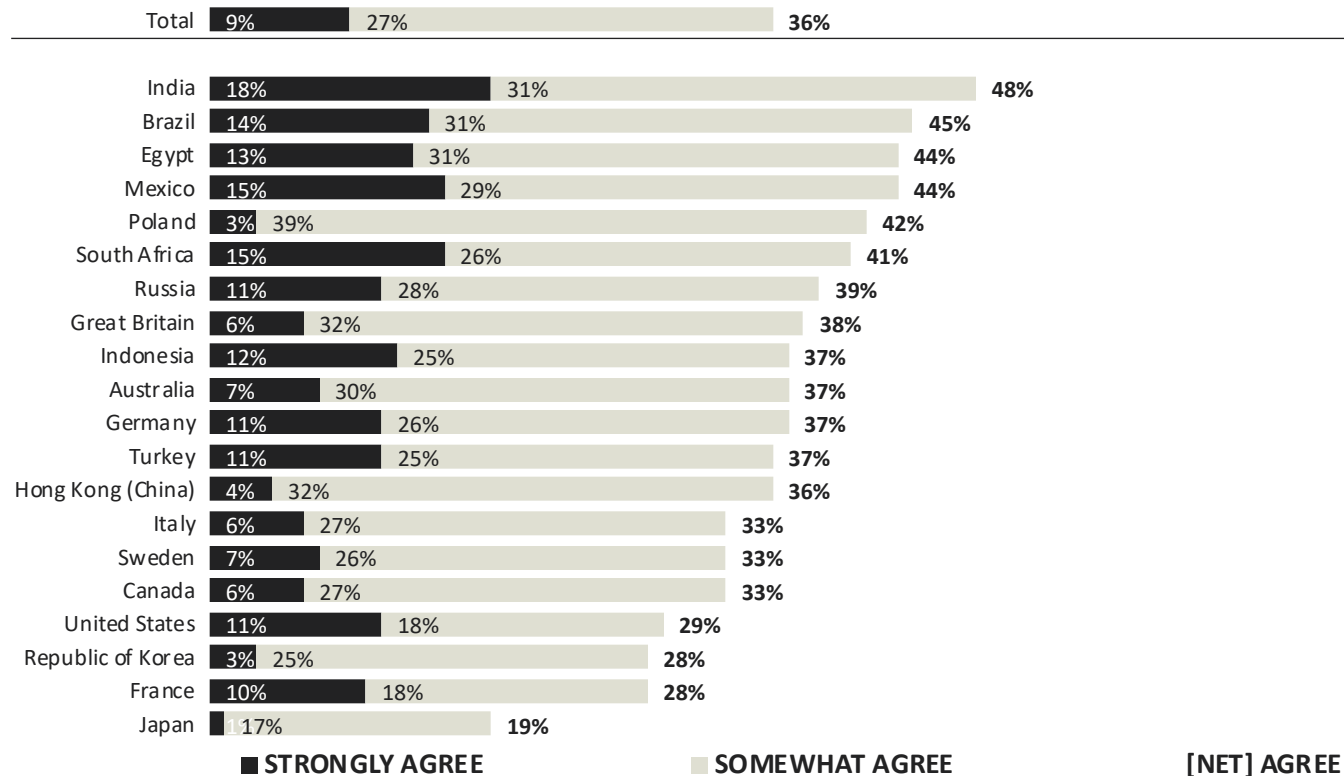
I WANT MY ONLINE DATA AND PERSONAL INFORMATION STORED ON PHYSICALLY SECURE SERVERS OUTSIDE MY ECONOMY

Those in the BRICS (-5 pts) & European (-4) economies register the greatest shifts in opinion, relative to the untreated group.



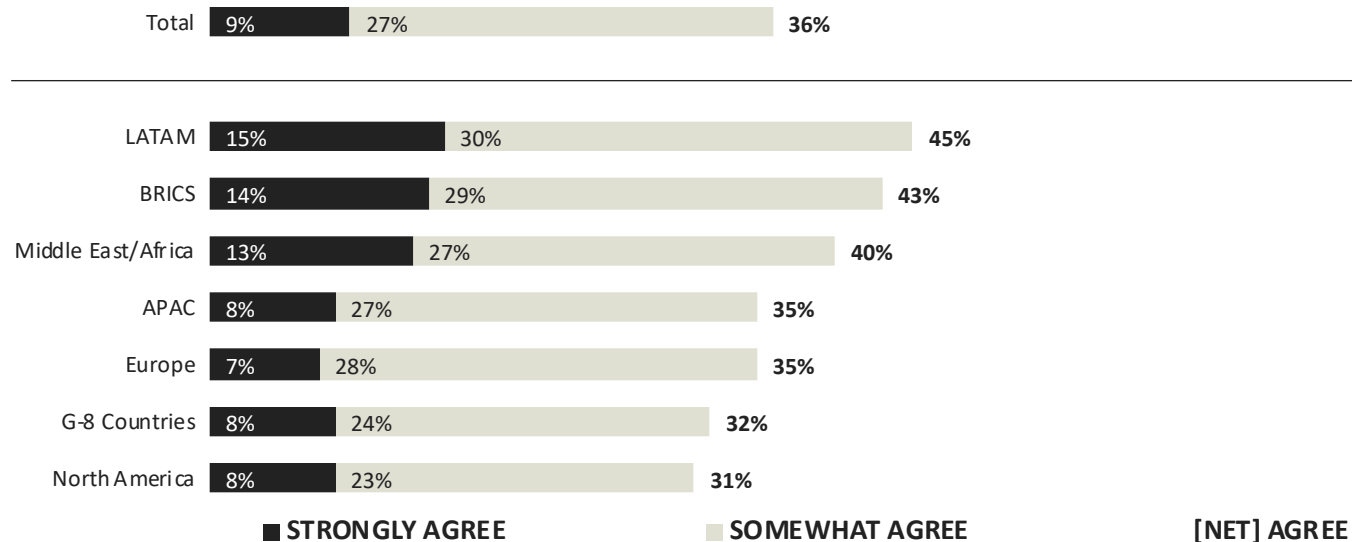
IT DOES NOT BOTHER ME THAT MY DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

After exposure to arguments favouring cross-border data flows, Canadians become twice as likely to *agree* that they are not bothered by the fact that their data sometimes leaves the economy (33% vs. 16% unaided). There are also sizeable shifts in opinion in Italy (-15 pts) & Australia (+10).



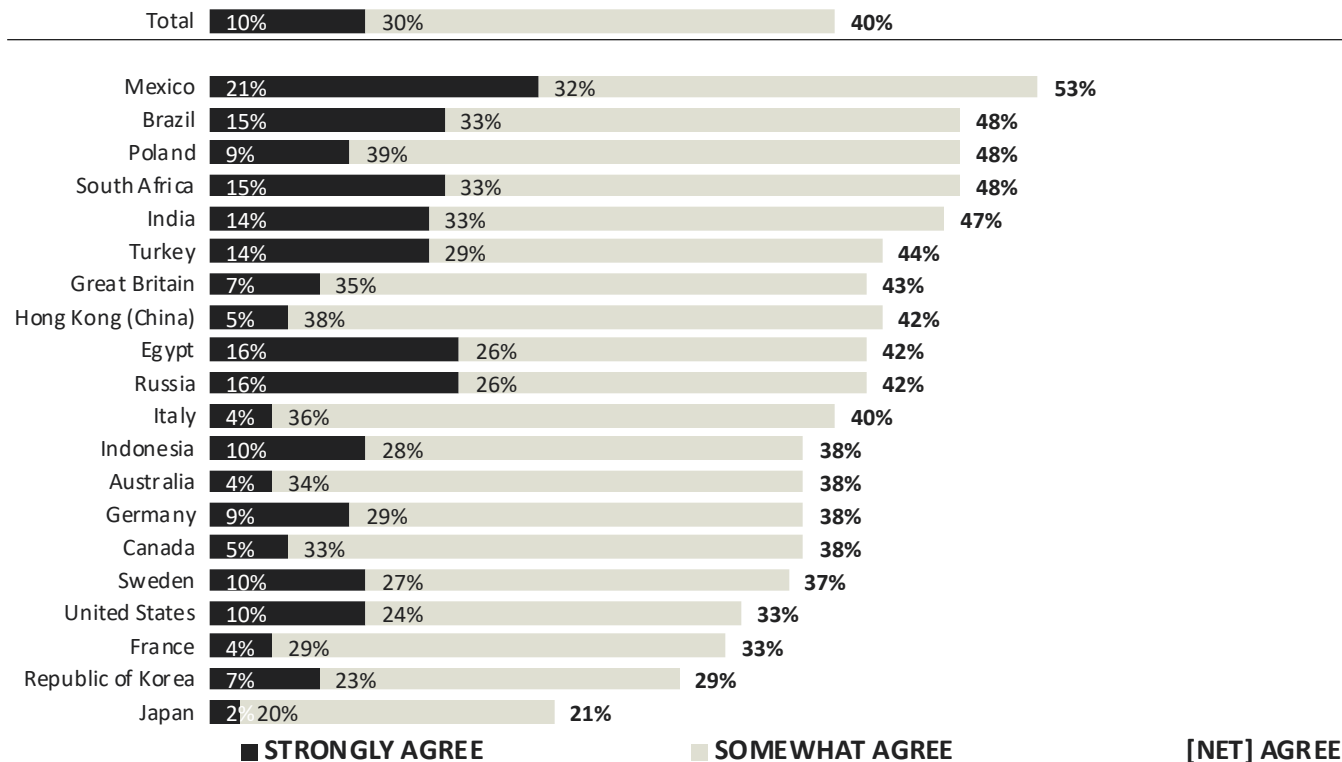
IT DOES NOT BOTHER ME THAT MY DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

There is a large increase in the share of North Americans (+7 pts vs. unaided) who *agree* that cross-border data movements do not bother them, relative to the untreated group.



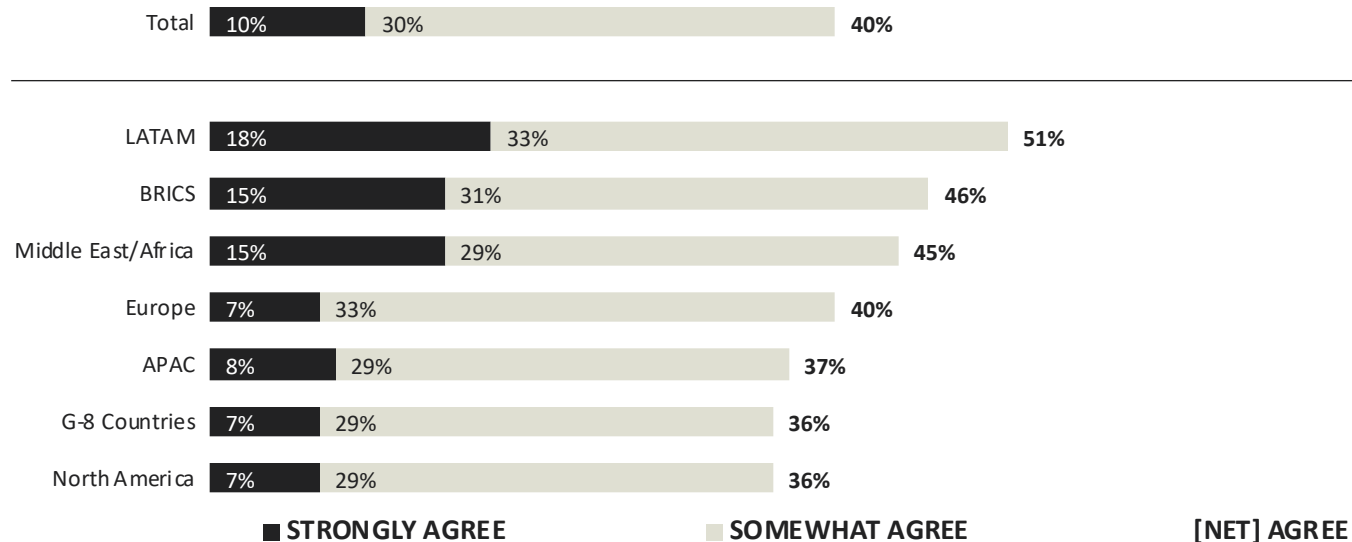
IT DOES NOT BOTHER ME THAT THE DATA OF FIRMS IN MY ECONOMY SOMETIMES GOES OUTSIDE OF MY ECONOMY

Similarly, after exposure to stimulus favouring reduced cross-border data restrictions, Canadians are twice as likely to *agree* that they are not bothered if data from firms in their economy leaves the economy (38% vs. 19% unaided). There are also notable shifts in opinion in Australia (+11 pts) & Great Britain (+10).



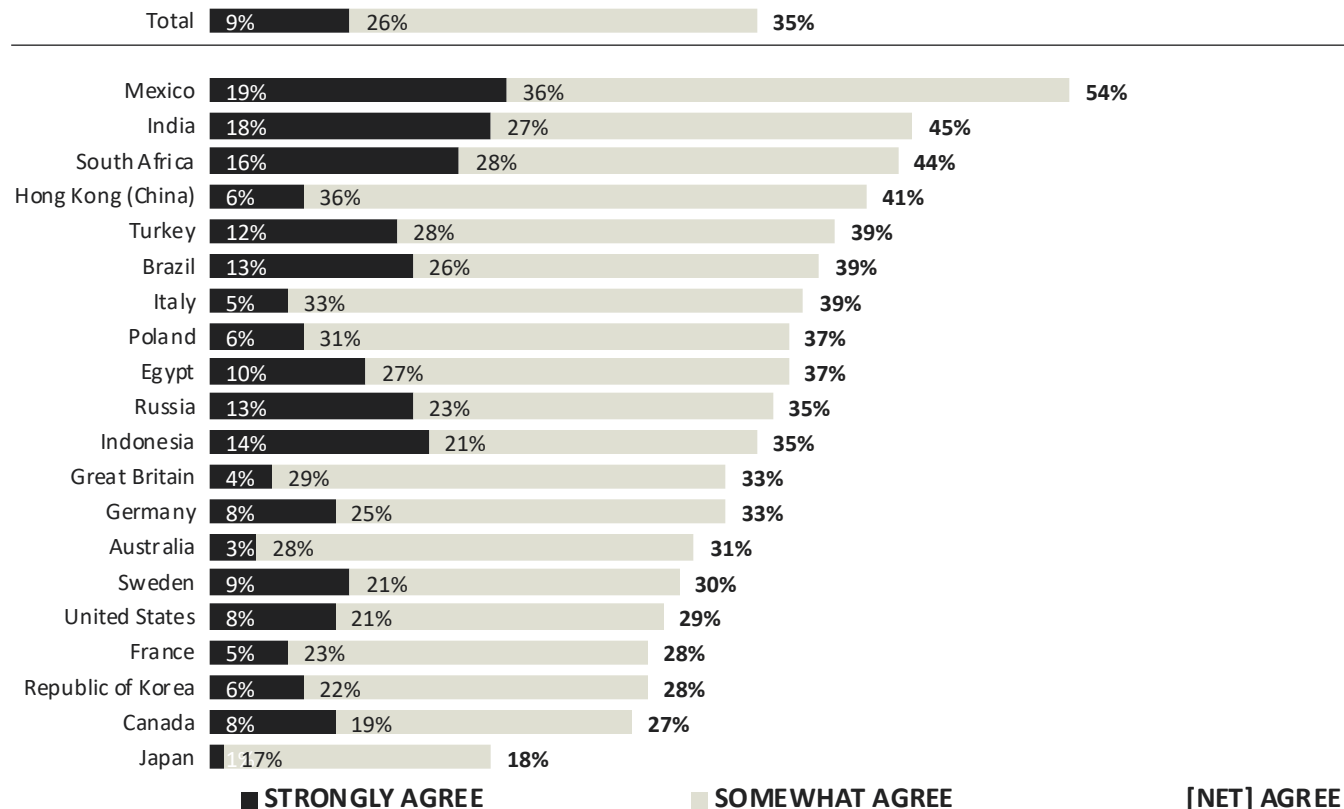
IT DOES NOT BOTHER ME THAT THE DATA OF FIRMS IN MY ECONOMY SOMETIMES GOES OUTSIDE OF MY ECONOMY

Regardless of economy, a greater proportion *agree* that they are not bothered if the data of firms in their economy sometimes leaves the economy, after exposure to arguments favouring reduced cross-border data restrictions. Relative to the untreated group, the North American economies register the greatest shift in opinion (+12 pts).



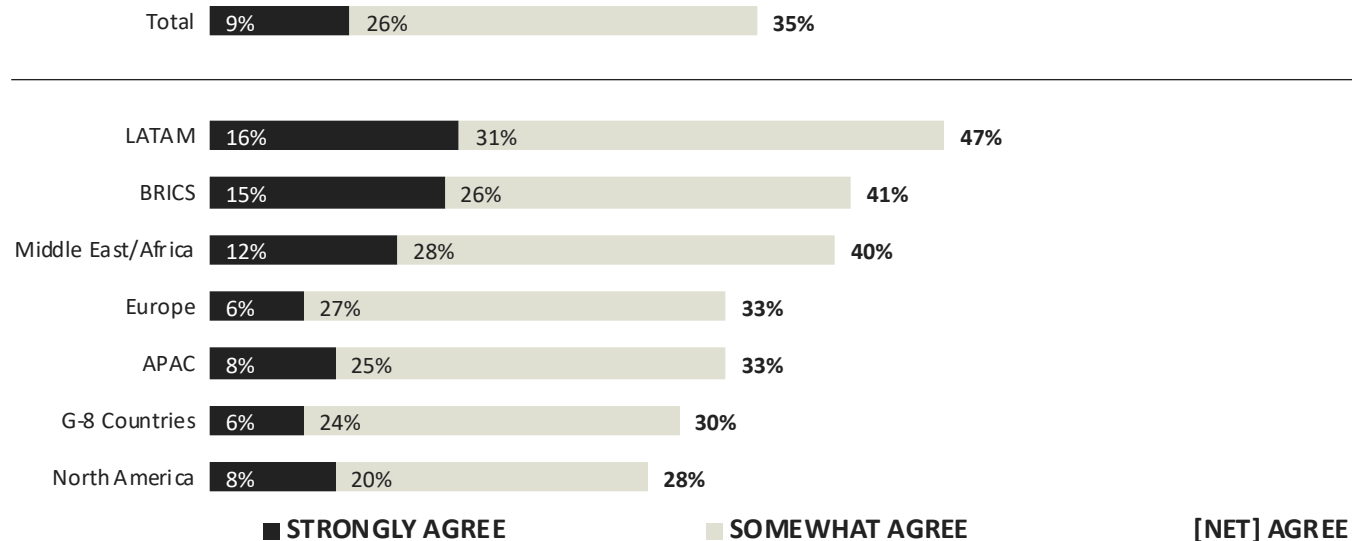
IT DOES NOT BOTHER ME THAT MY GOVERNMENT'S DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

Once again, relative to the untreated group the greatest shifts in opinion occur in Canada (+12 pts).



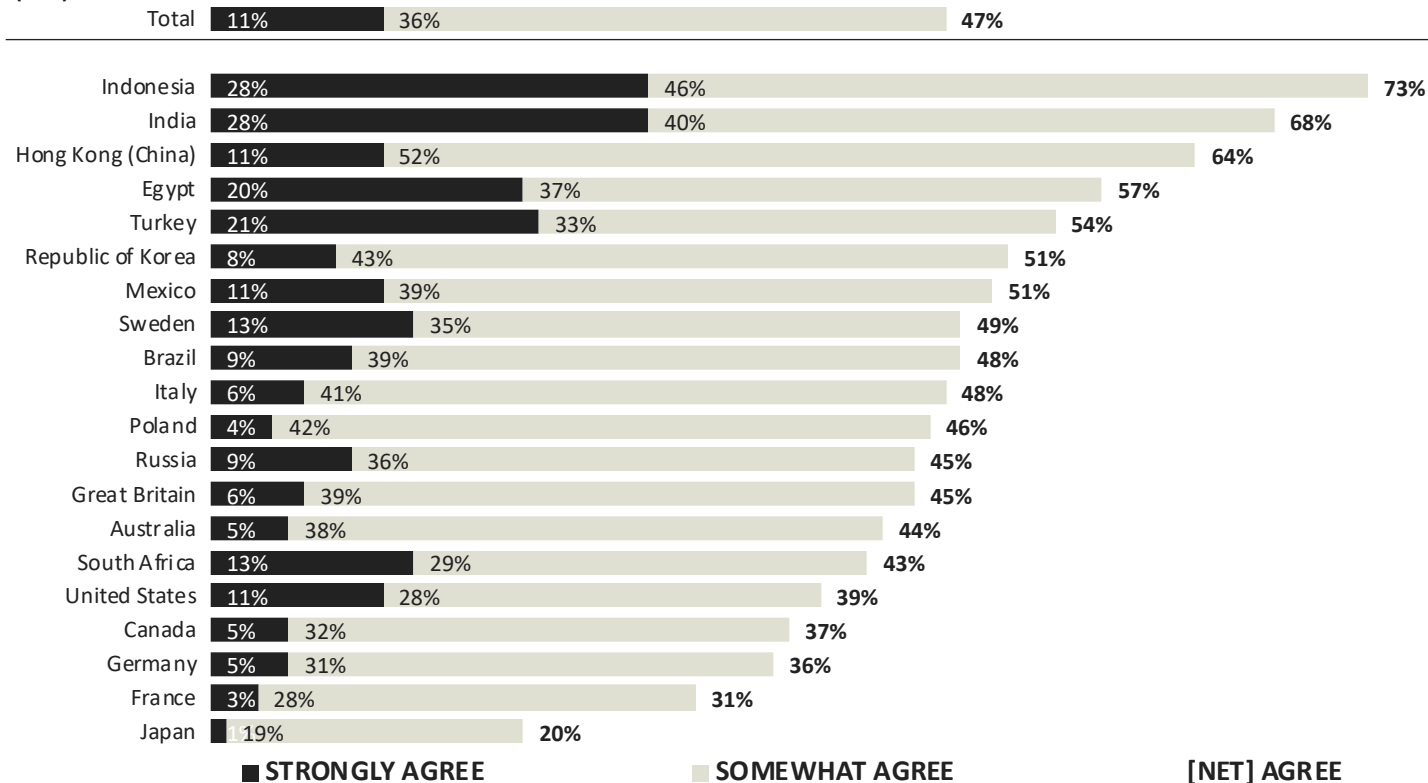
IT DOES NOT BOTHER ME THAT MY GOVERNMENT'S DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

Similarly, the most substantial movements in opinion, relative to unaided exposure, occurs in the North American economies (+6 pts).



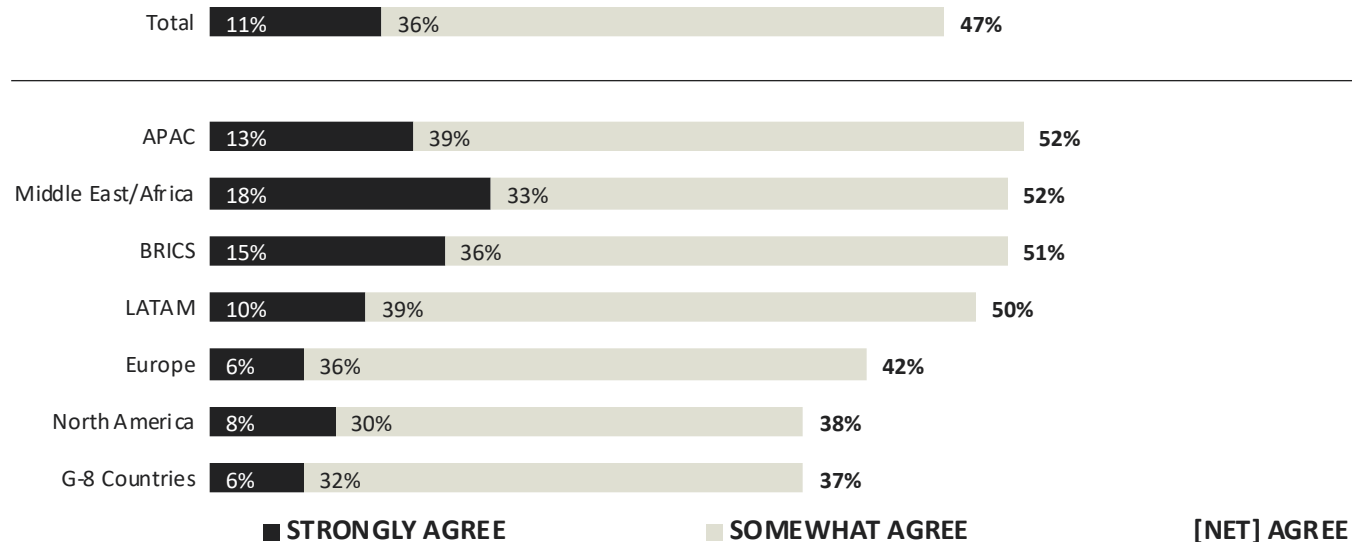
MY GOVERNMENT DOES ENOUGH TO PROTECT MY DATA

There are considerable shifts in opinion, both ways, in comparison to the untreated group, with the most notable shifts recorded in Japan (-13 pts), the Republic of Korea (+12), Sweden (-12), Poland (-11), Mexico (+10) & Australia (+9).



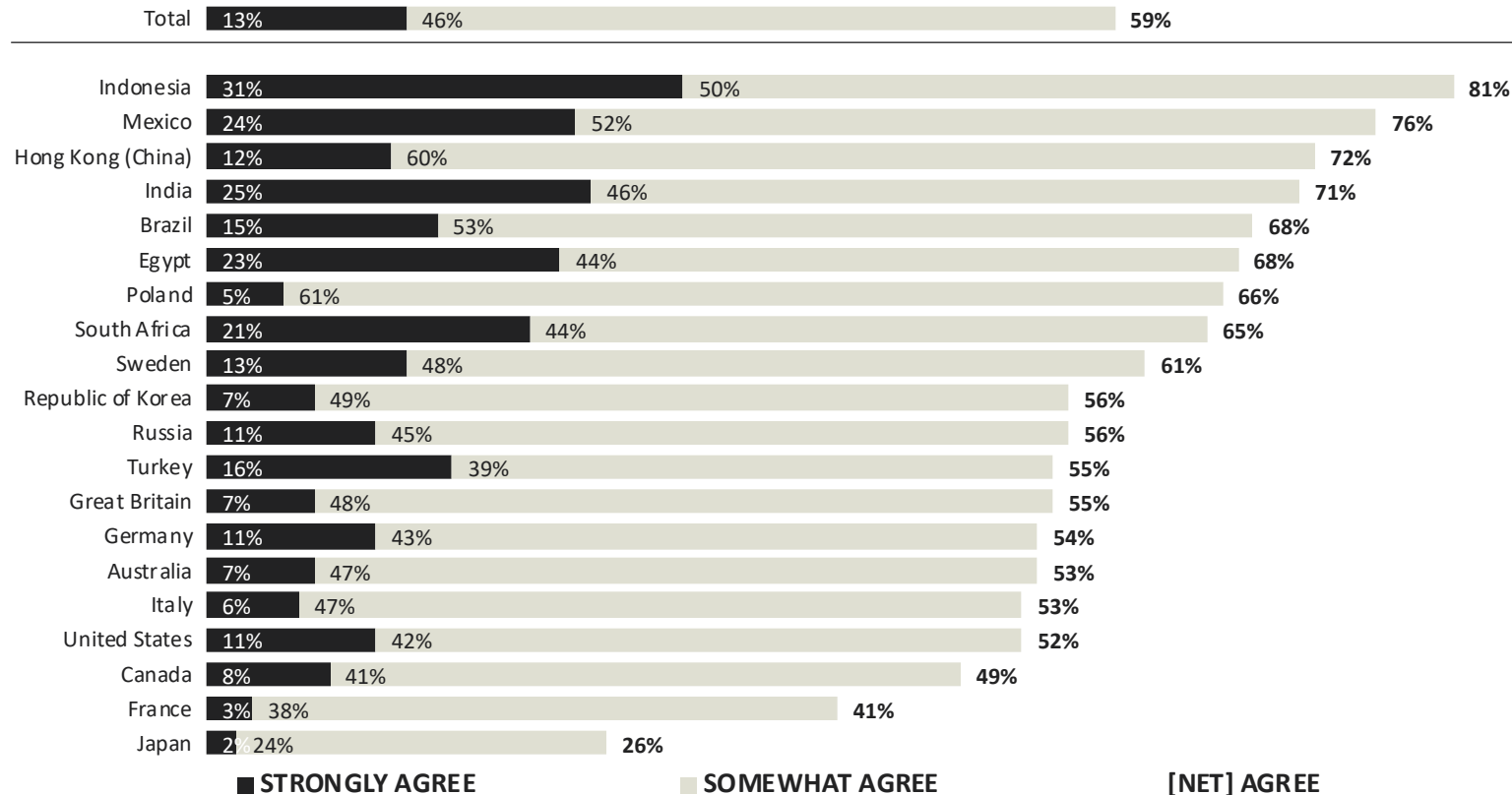
MY GOVERNMENT DOES ENOUGH TO PROTECT MY DATA

In all regional economies, save for LATAM & APAC (unchanged), fewer *agree* that their government does enough to protect their data, relative to the untreated group. Agreement has declined the most in Europe (-6 pts).



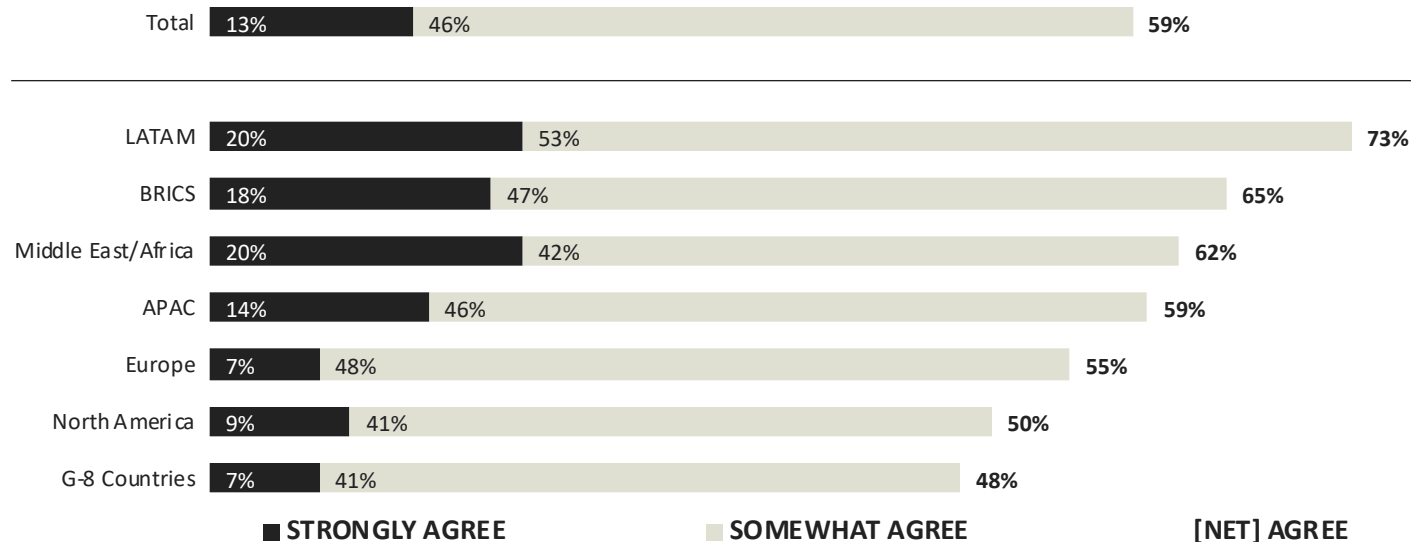
THE COMPANIES I USE DO ENOUGH TO PROTECT MY DATA

After exposure to arguments favouring reduced cross-border data restrictions, there is some variance in opinion, both ways, with the greatest movement occurring in the Republic of Korea (+13 pts) & Japan (-13).



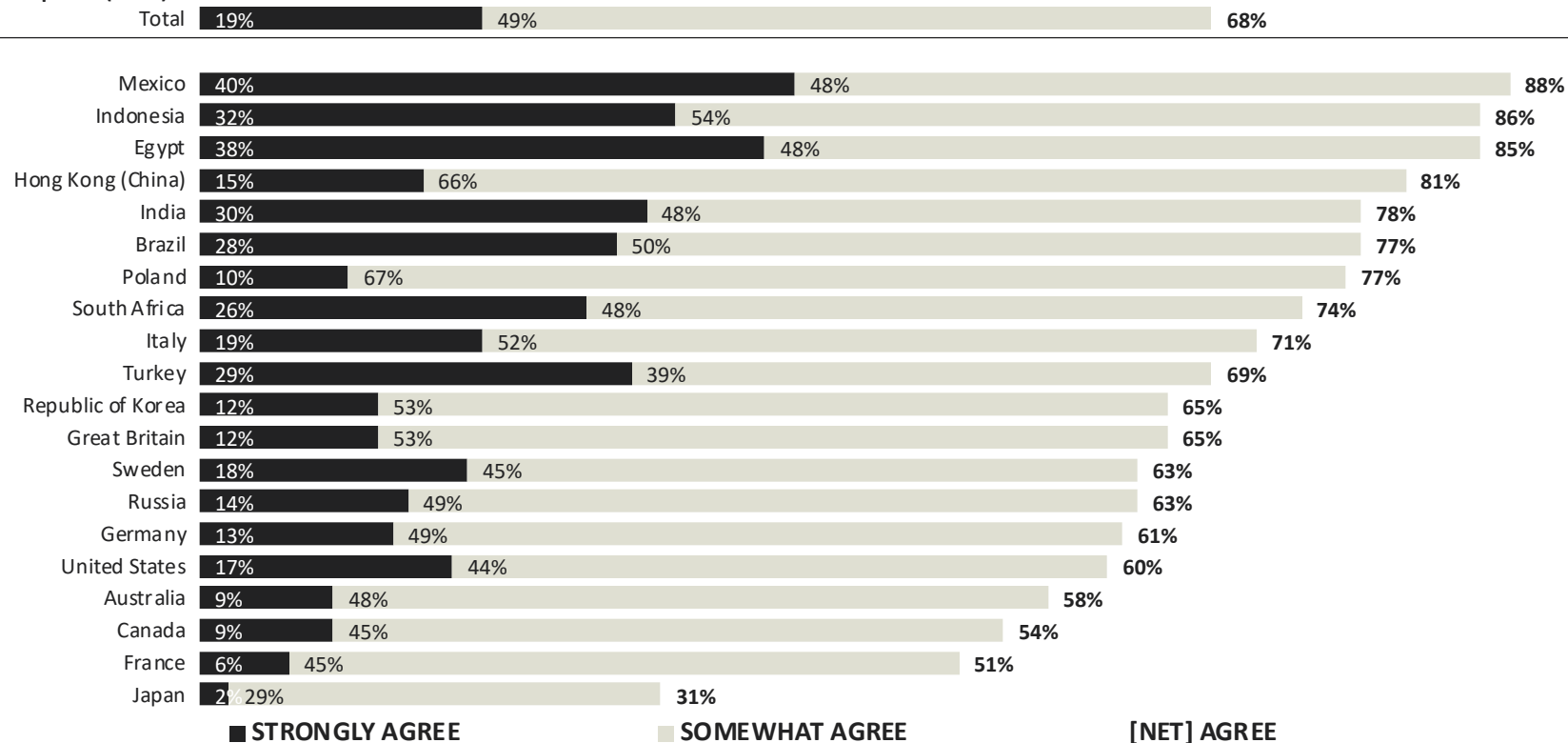
THE COMPANIES I USE DO ENOUGH TO PROTECT MY DATA

With the exception of the LATAM & APAC economies, citizens in each of the regional economies are less likely to feel as though the companies they use are doing enough to protect their data, relative to the untreated group, after exposure to arguments favouring fewer cross-border data restrictions.



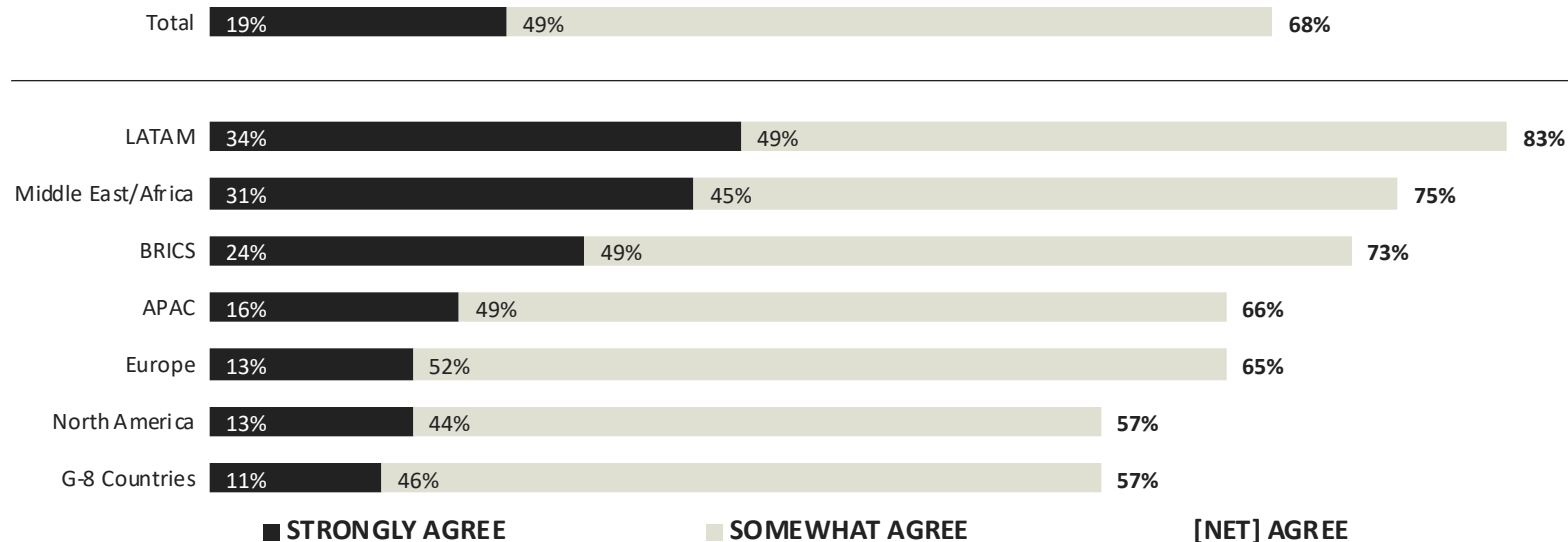
I DO ENOUGH TO PROTECT MY DATA

For the most part, global citizens are less inclined to *agree* that they do enough to protect their data, after exposure to arguments favouring reduced cross-border data restrictions. Opinions have shifted the most in Canada (-11 pts) & Japan (-10).



I DO ENOUGH TO PROTECT MY DATA

In each economy, less *agree* that they do enough to protect their own data in comparison to the untreated group.





GROUP 3: TREATMENT #2

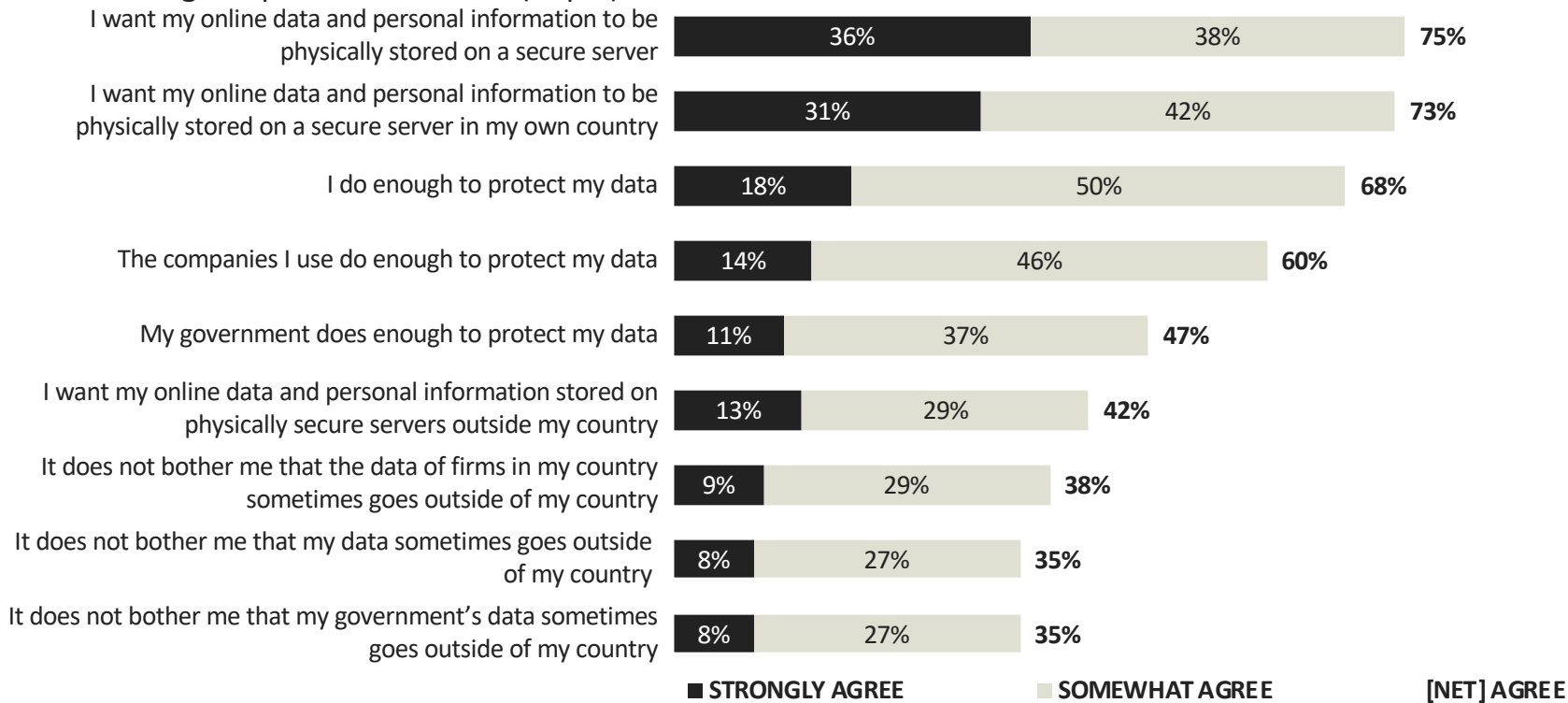
TREATMENT #2



Those who advocate for **GREATER restrictions** on data flowing across national borders *cite the following reasons why:*

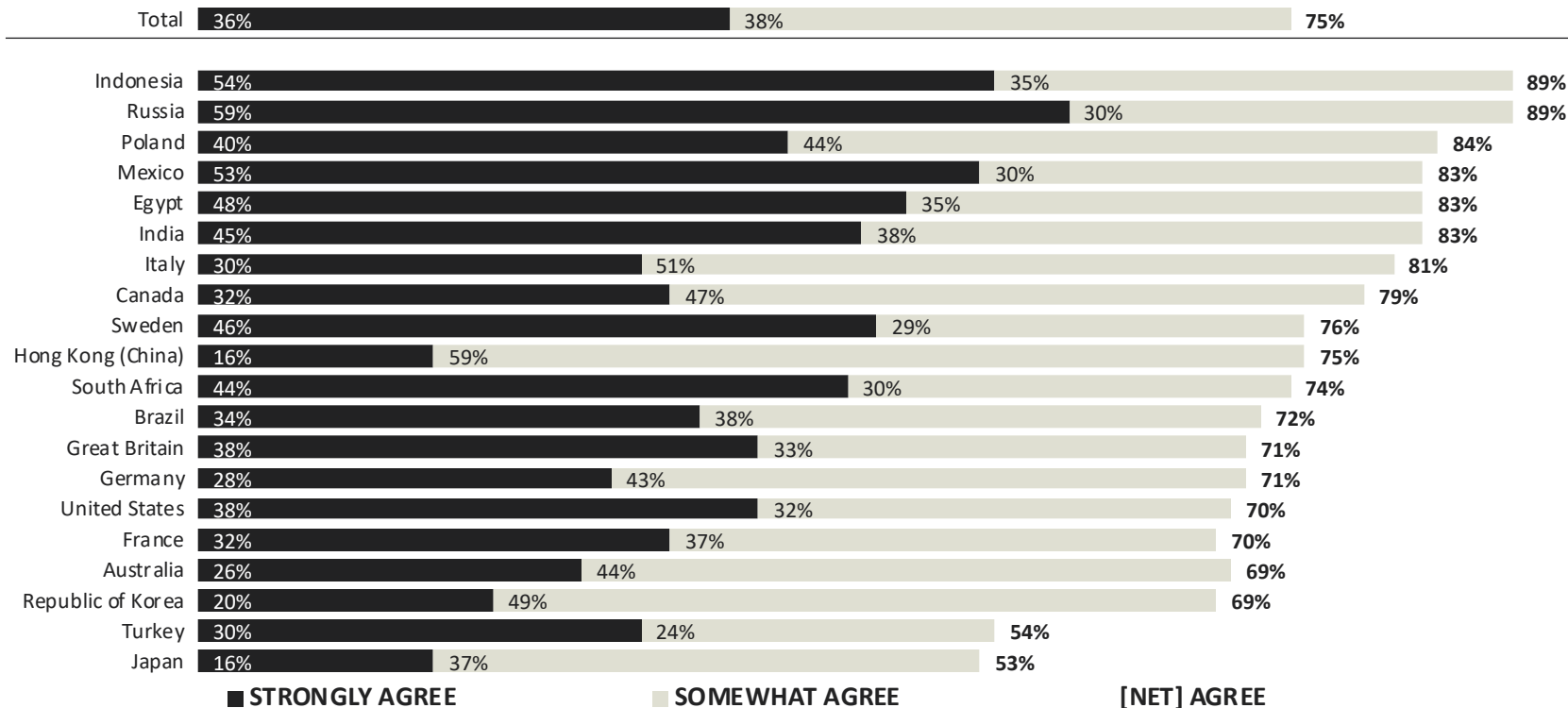
- Data that leaves your economy is subject to government surveillance by other economies
- Cross-border data flows are vulnerable to cybercriminals
- Cross-border data flows are how corporations profit from individual users
- Cross-border data flows mean you cannot know where the data you generate is located
- Restrictions on cross-border data flows are necessary for national security
- Restrictions on cross-border data flows are essential for national law enforcement
- Restrictions are important for local economic development
- Cross-border data flows help protect user privacy

After exposure to arguments favouring greater cross-border data restrictions, global citizens tend to feel less concerned about corporate data leaving their economy, but are less likely to think that they do enough to protect their own data, relative to the untreated group. There is also a drop in the proportion who think their government does enough to protect their data (-2 pts).



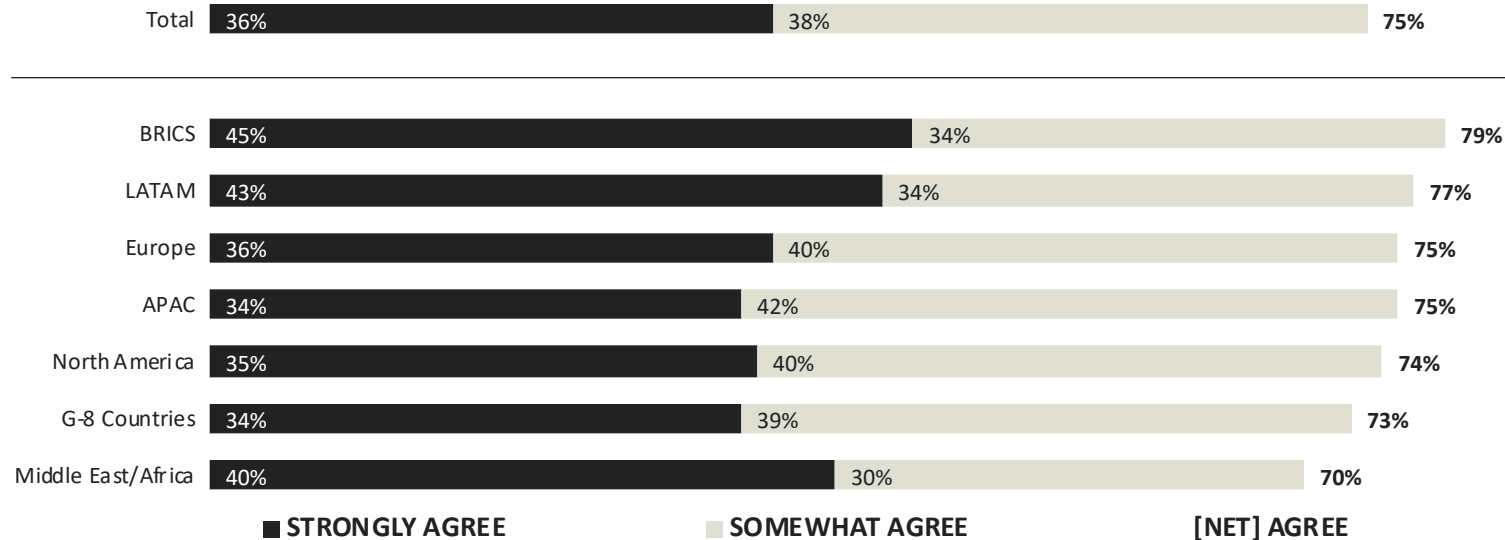
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER

After exposure to arguments favouring greater cross-border restrictions, slightly fewer global citizens *agree* that they would like their online data & personal information to be physically stored on a secure server (-1 pts), with the most substantial declines occurring in Brazil (-9 pts), Sweden (-8) & Turkey (-7).



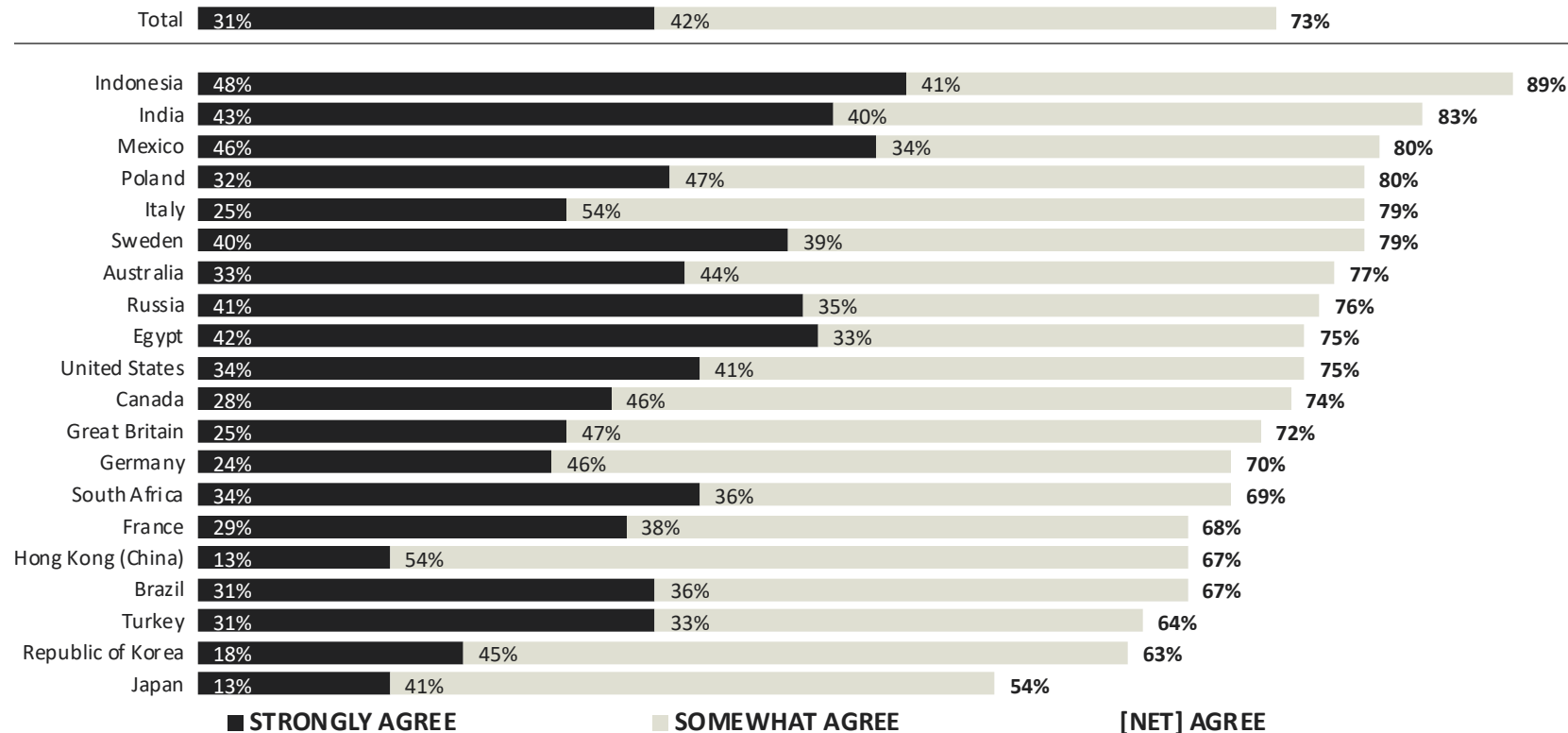
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER

With the exception of North America (+4 pts), fewer citizens in all economies *agree* that they would like to have their online data & personal information to be physically stored on a secure server, after exposure to arguments favouring greater cross-border restrictions.



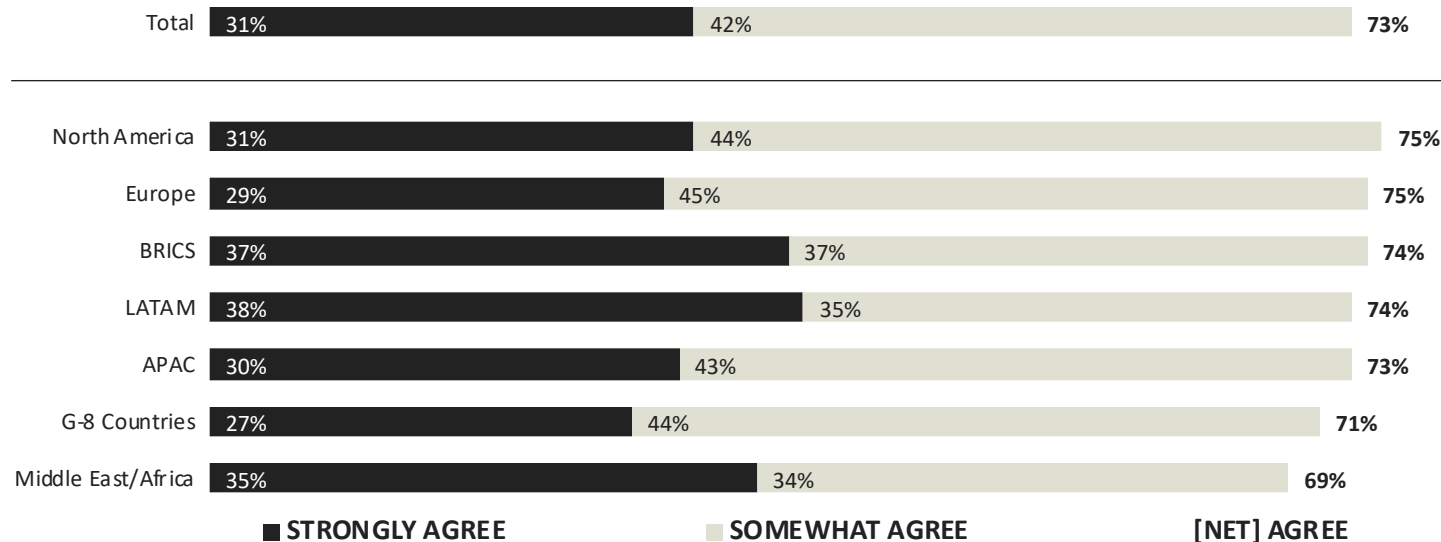
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER IN MY OWN ECONOMY

On balance, global citizens are no more or less likely to *agree* that they would like to have their data & personal information to be physically stored on a secure server in their own economy, after exposure to arguments favouring greater cross-border data restrictions.



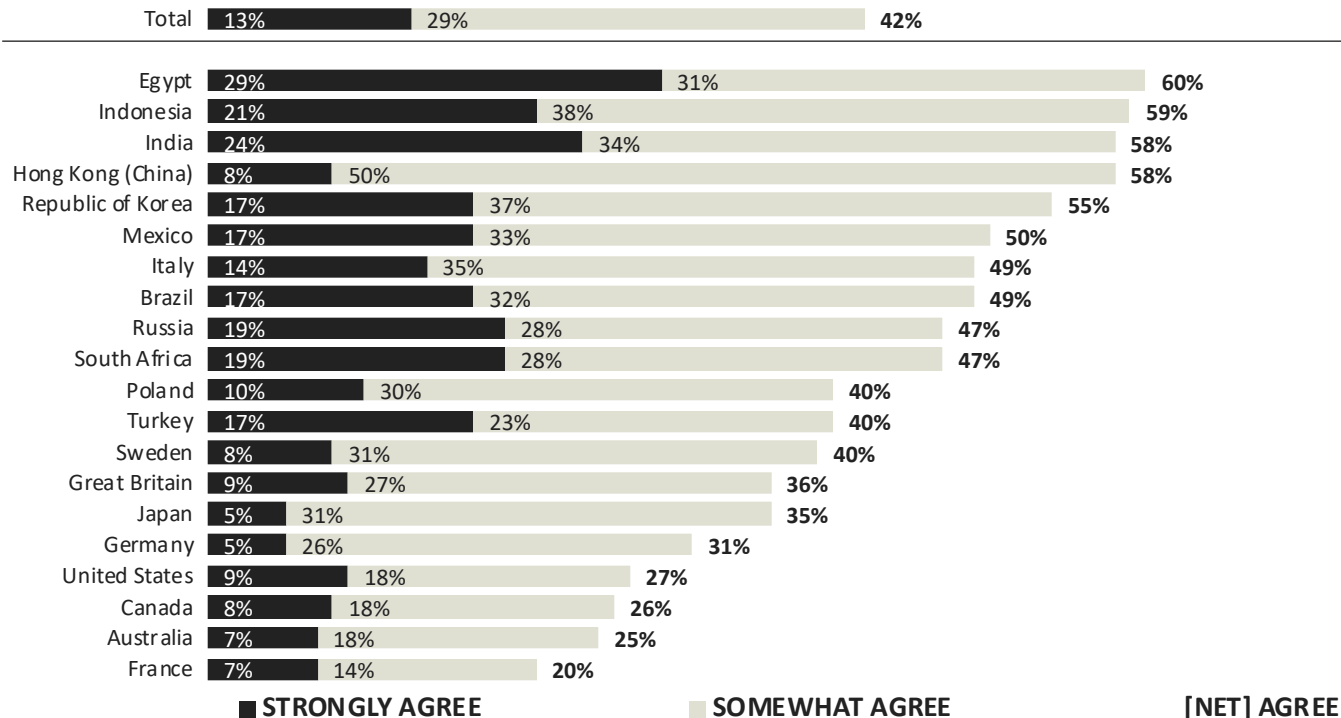
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER IN MY OWN ECONOMY

Regionally, opinion has shifted, albeit to a limited degree, in both directions, relative to the untreated group.



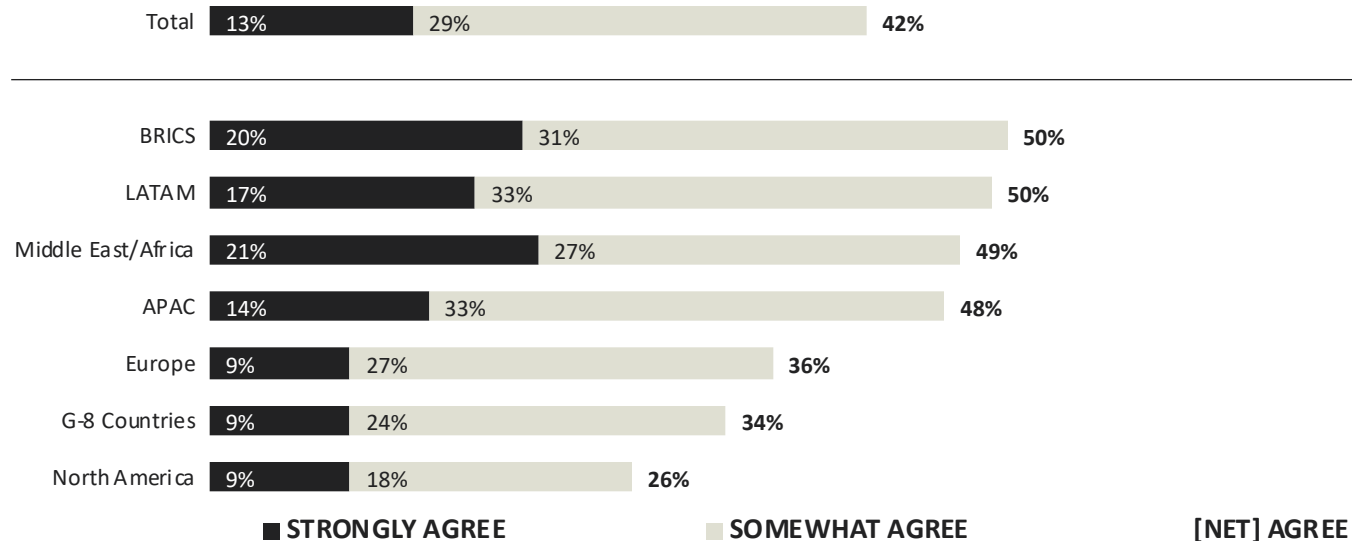
I WANT MY ONLINE DATA AND PERSONAL INFORMATION STORED ON PHYSICALLY SECURE SERVERS OUTSIDE MY ECONOMY

In most economies, slightly fewer *agree*, compared to the untreated group, they would like to have their online data & personal information stored on physically secure servers outside their economy. However, the greatest movements in opinion have been upwards, in Canada (+12 pts) & the Republic of Korea (+12).



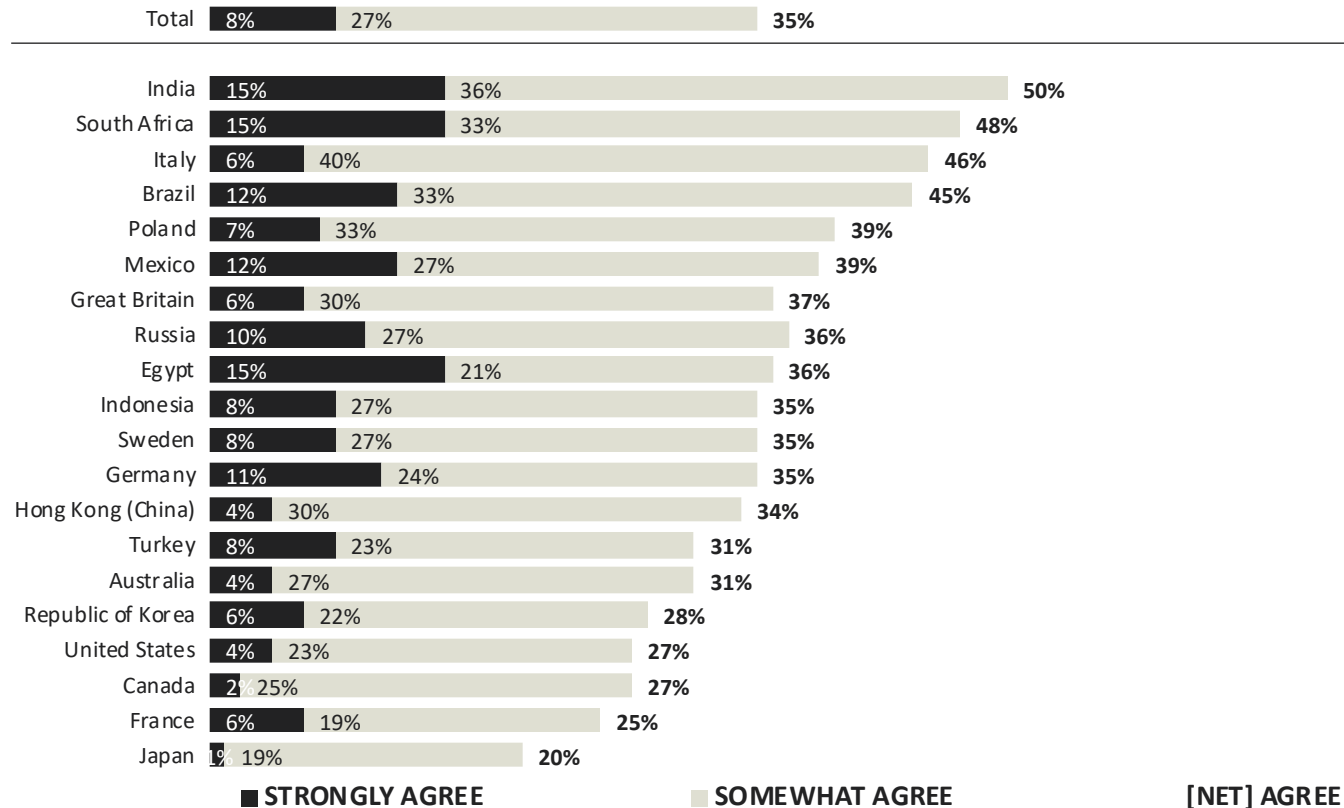
I WANT MY ONLINE DATA AND PERSONAL INFORMATION STORED ON PHYSICALLY SECURE SERVERS OUTSIDE MY ECONOMY

Overall, global citizens are no more or less likely to *agree* that they would like to have their online data & personal information stored on physically secure servers outside their economy, relative to the untreated group.



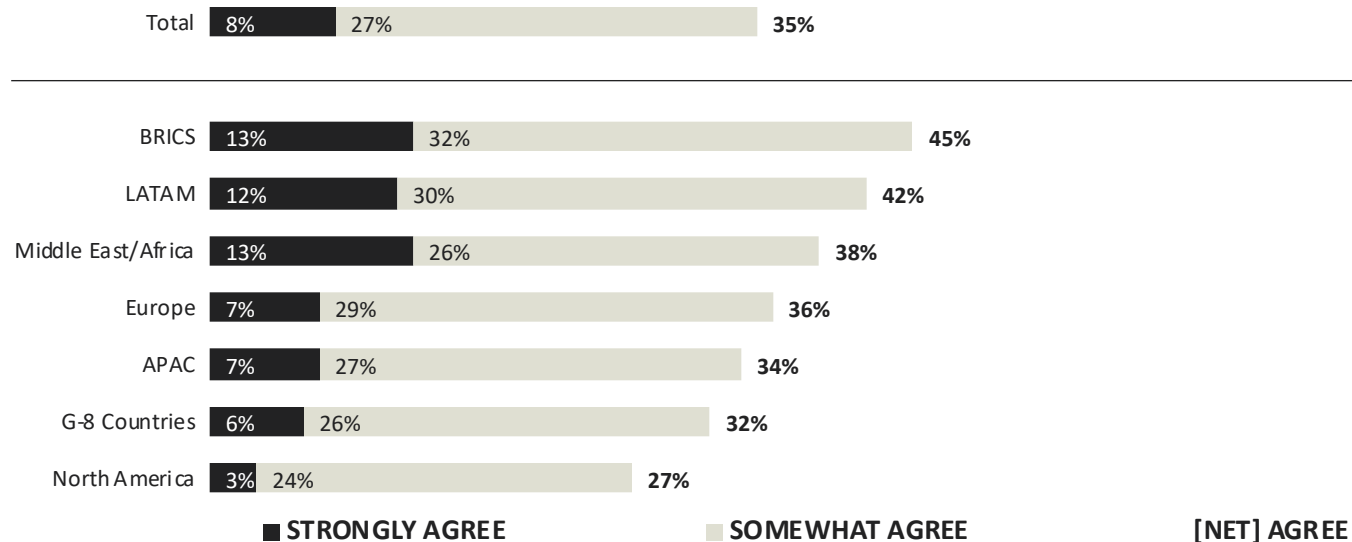
IT DOES NOT BOTHER ME THAT MY DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

On balance, exposure to arguments favouring greater cross-border data restrictions has little impact on opinions. With that said, there is a sizeable upward shift in opinions in Canada (+11 pts) & Russia (+8).



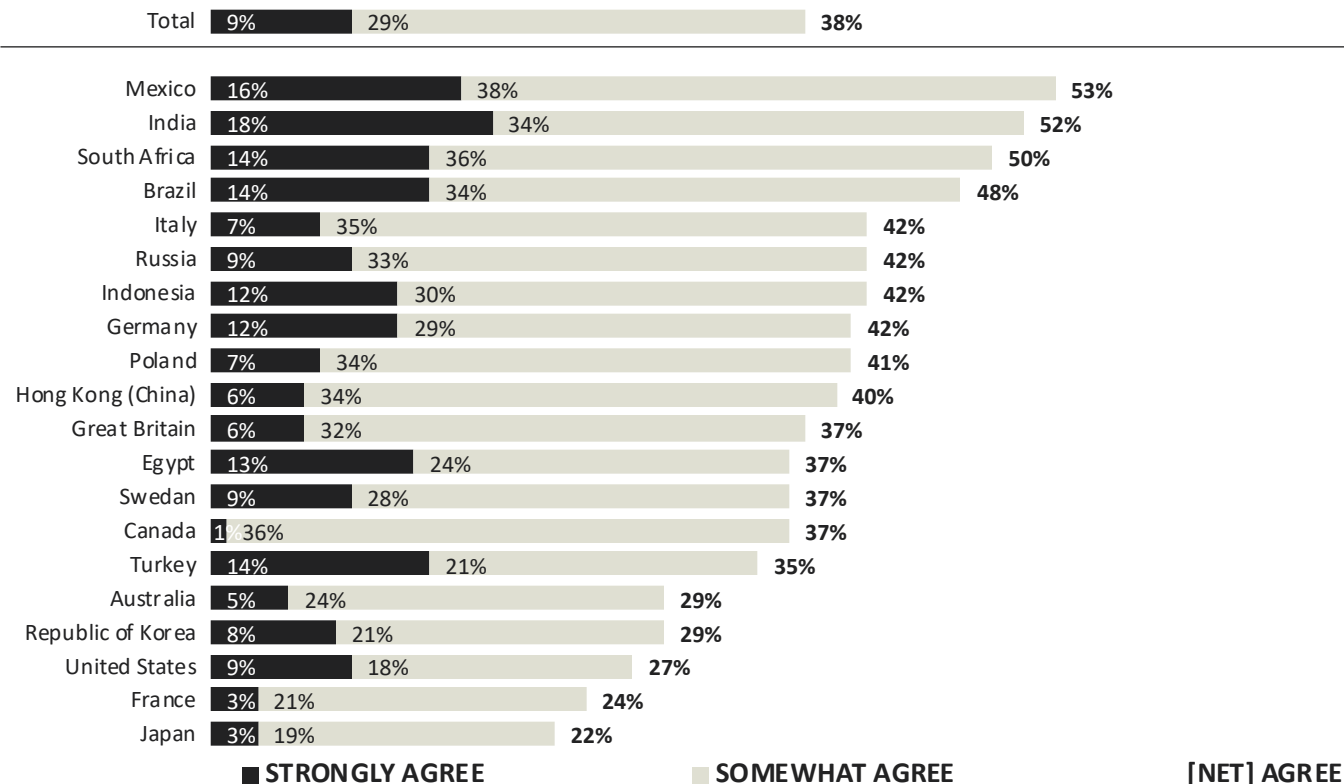
IT DOES NOT BOTHER ME THAT MY DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

In each of the regional economies, opinions vary little relative to the untreated group.



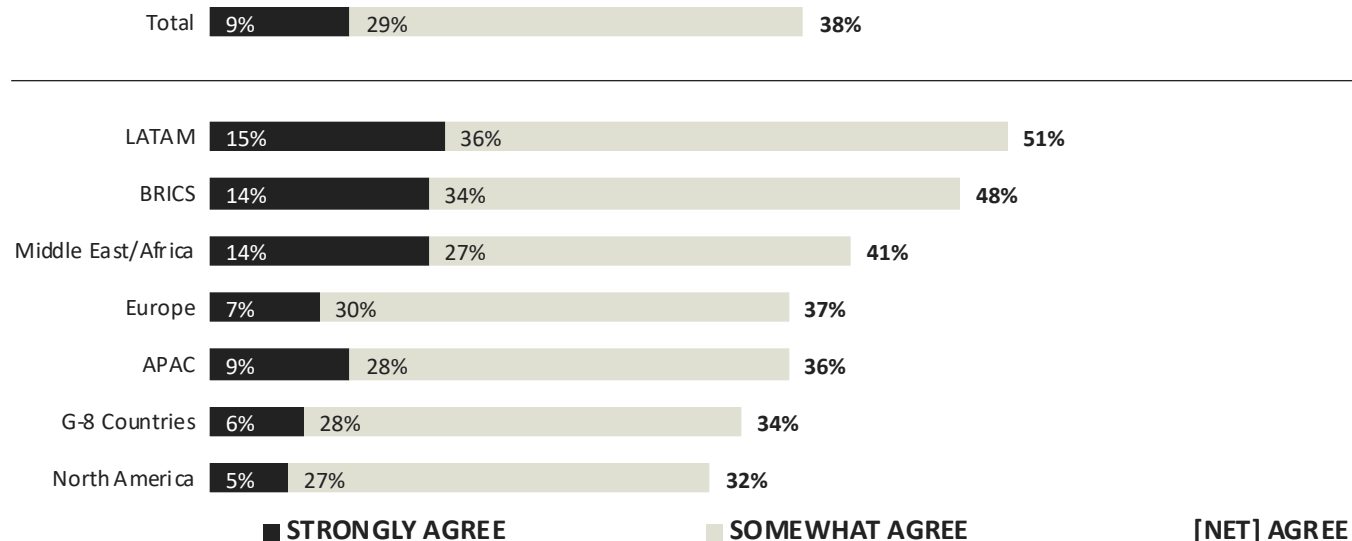
IT DOES NOT BOTHER ME THAT THE DATA OF FIRMS IN MY ECONOMY SOMETIMES GOES OUTSIDE OF MY ECONOMY

Those who saw arguments favouring greater cross-border security tend to be more inclined to *agree* that they are not bothered by the fact that the data of firms in their economy sometimes leaves the economy, relative to those who receive no treatment (+2 pts). Much of the increase is being led by Canadians (+18).



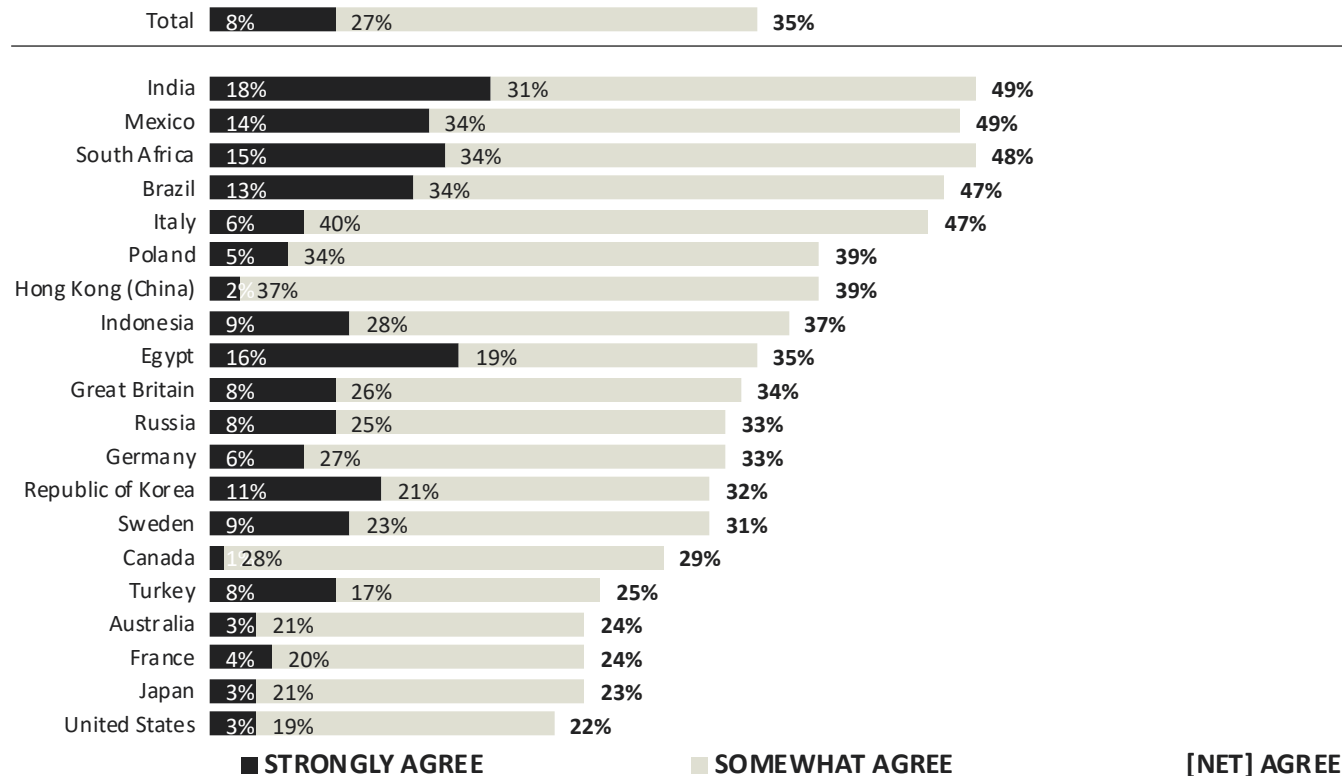
IT DOES NOT BOTHER ME THAT THE DATA OF FIRMS IN MY ECONOMY SOMETIMES GOES OUTSIDE OF MY ECONOMY

Opinions have shifted the most in North America, where there is a substantial increase (+8 pts) in the proportion of citizens who *agree* that they are not bothered if data from firms in their economy sometimes leaves the economy, after being exposed to materials advocating for greater restrictions on cross-border data flows.



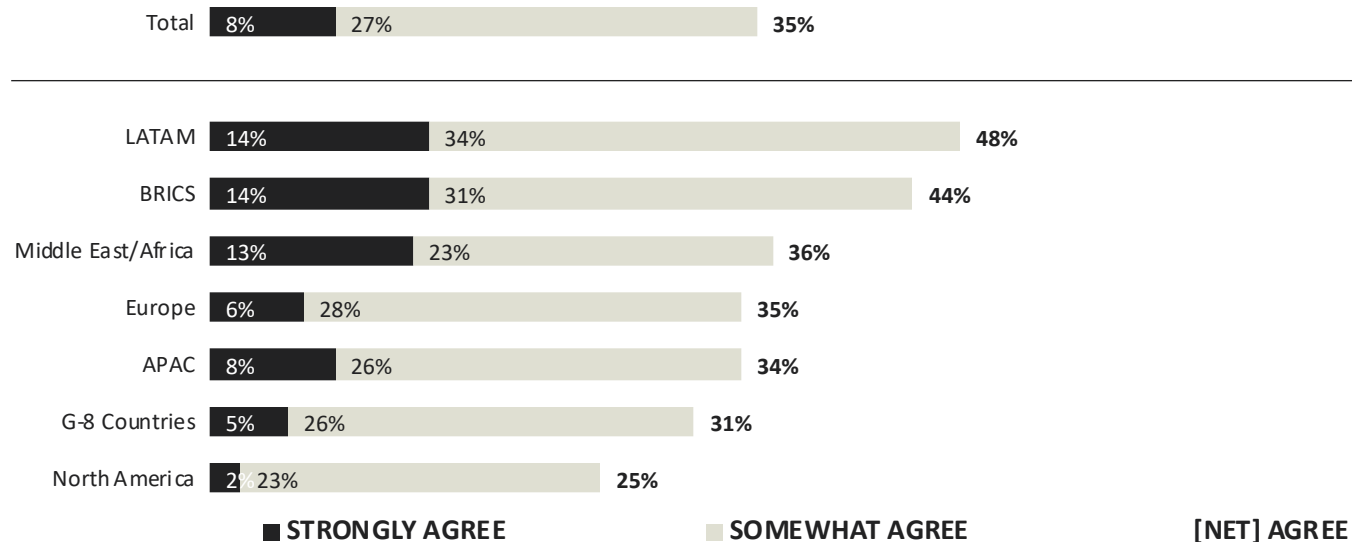
IT DOES NOT BOTHER ME THAT MY GOVERNMENT'S DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

Globally, there is next to no difference in opinions after exposure to materials supporting greater cross-border data restrictions. In most economies, slightly fewer *agree* that they are not bothered by this, but the greatest shift in opinion is in the upward direction, and in Canada (+14 pts), specifically.



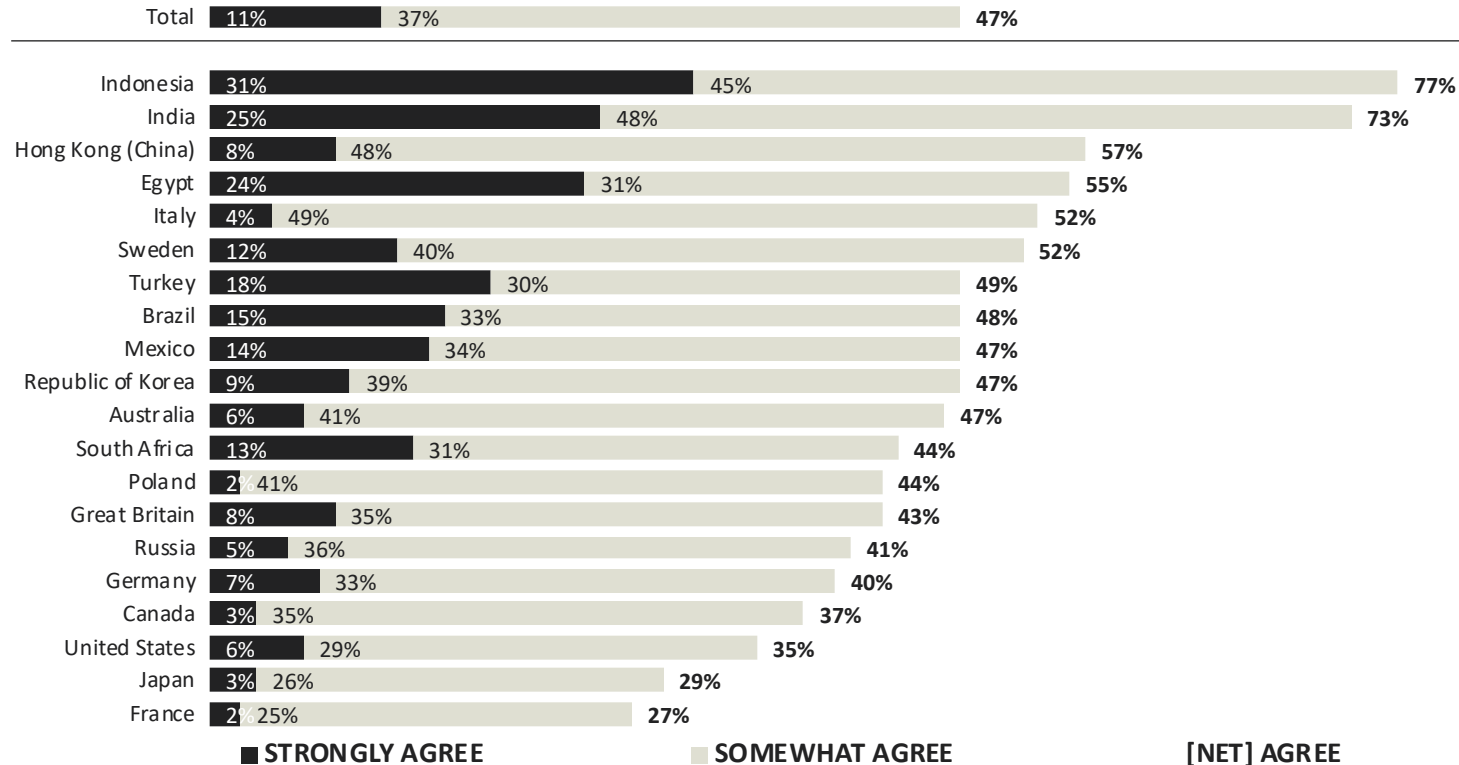
IT DOES NOT BOTHER ME THAT MY GOVERNMENT'S DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

This particular stimulus has little impact on opinions, as about the same proportion in each region, globally, *agree* that they are not bothered by the fact that their government's data sometimes leaves the economy.



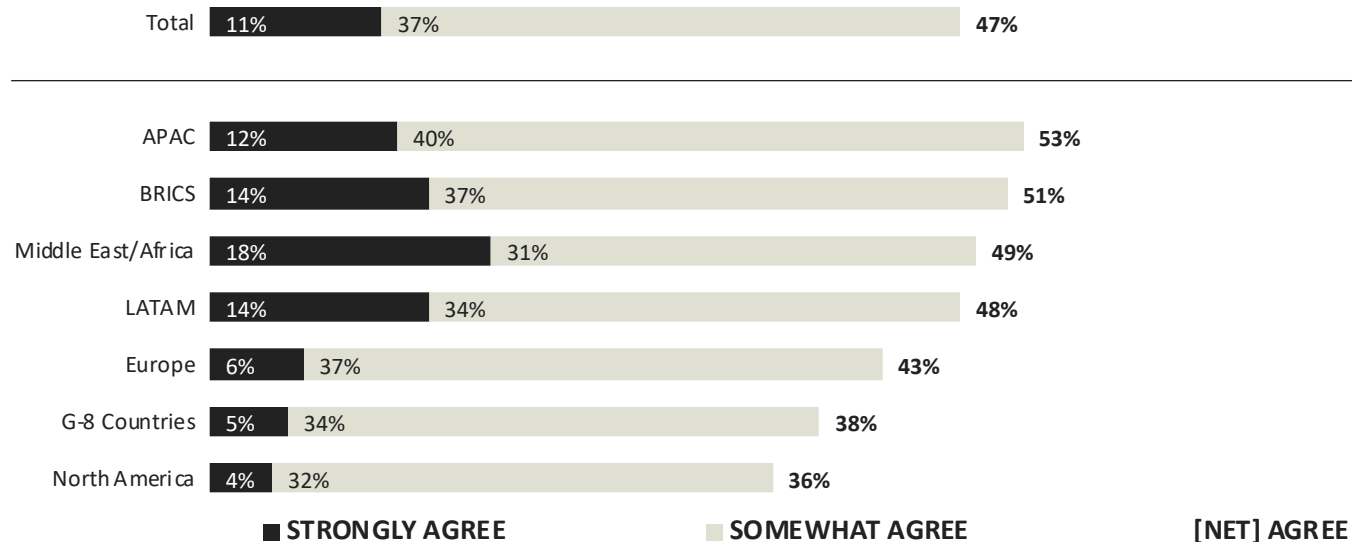
MY GOVERNMENT DOES ENOUGH TO PROTECT MY DATA

Overall, those who are exposed to arguments favouring greater cross-border data restrictions are a little less likely to *agree* that their government does enough to protect their data (-2 pts). The greatest shifts in opinion, as a result of concept exposure, occur in Poland (-13 pts) & Australia (+12).



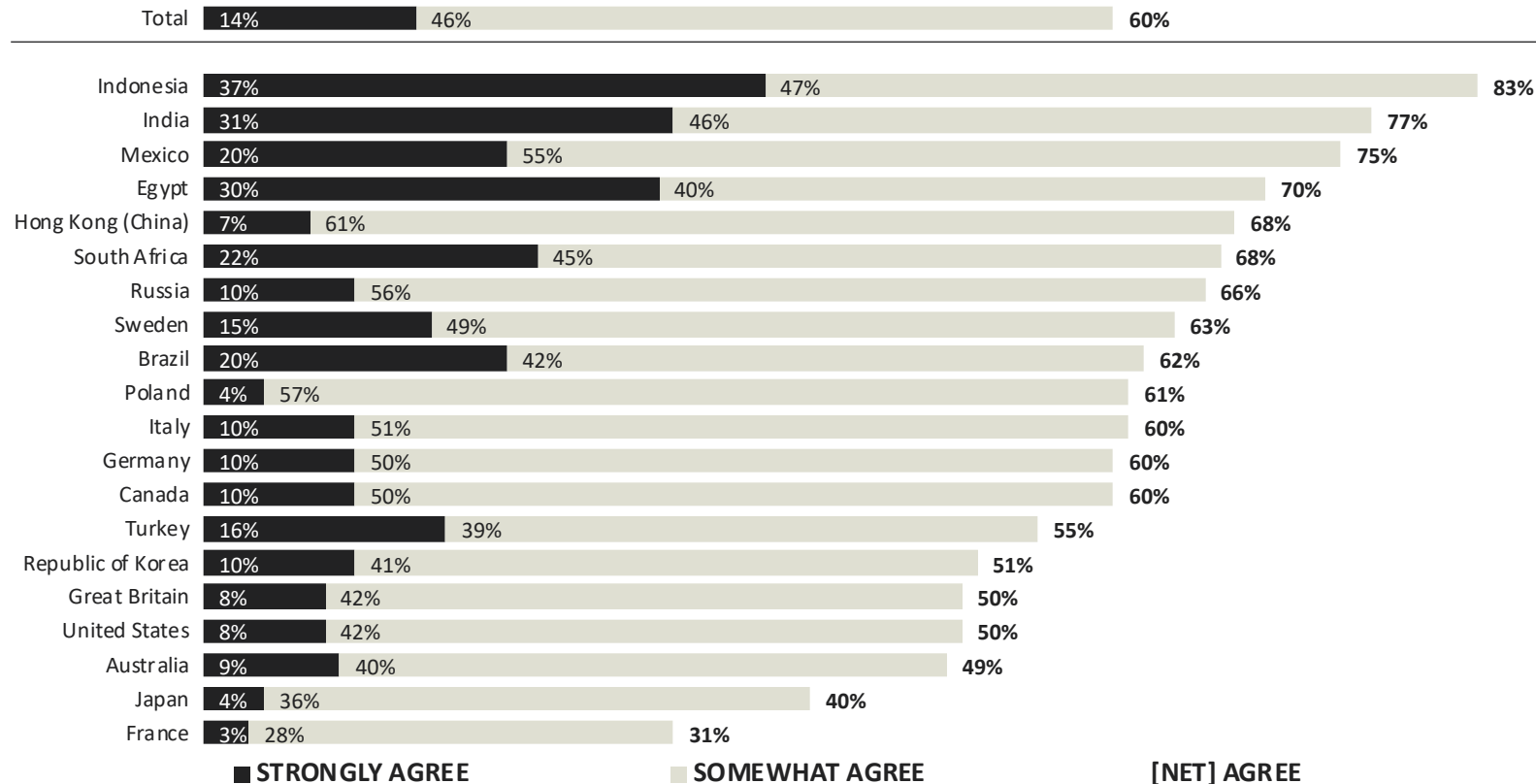
MY GOVERNMENT DOES ENOUGH TO PROTECT MY DATA

With the exception of the LATAM & APAC economies, fewer in all other regions *agree* that their government is doing enough to protect their data, after exposure to materials favouring increased cross-border data restrictions.



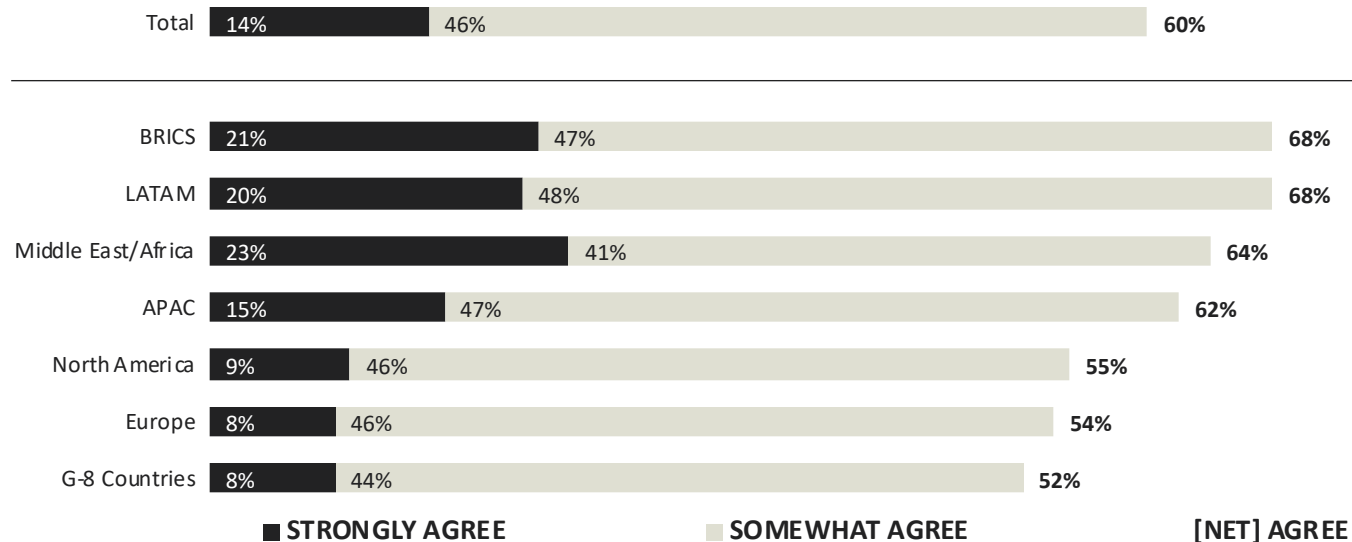
THE COMPANIES I USE DO ENOUGH TO PROTECT MY DATA

Relative to the untreated group, opinions have shifted the most in Brazil (-10 pts), Poland (-10) & France (-10).



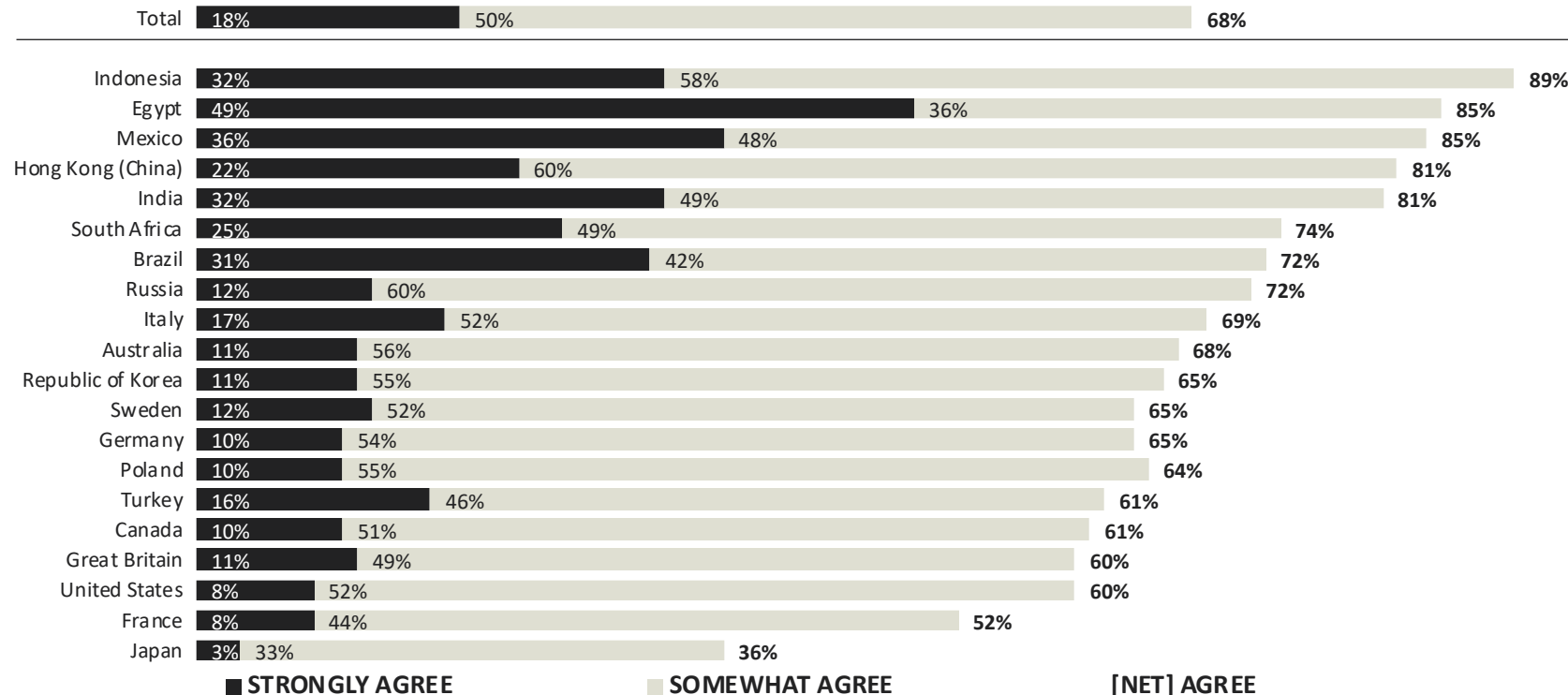
THE COMPANIES I USE DO ENOUGH TO PROTECT MY DATA

There are limited regional differences, relative to the untreated group. In each region, a majority agrees that the companies they are using do enough to protect their data.



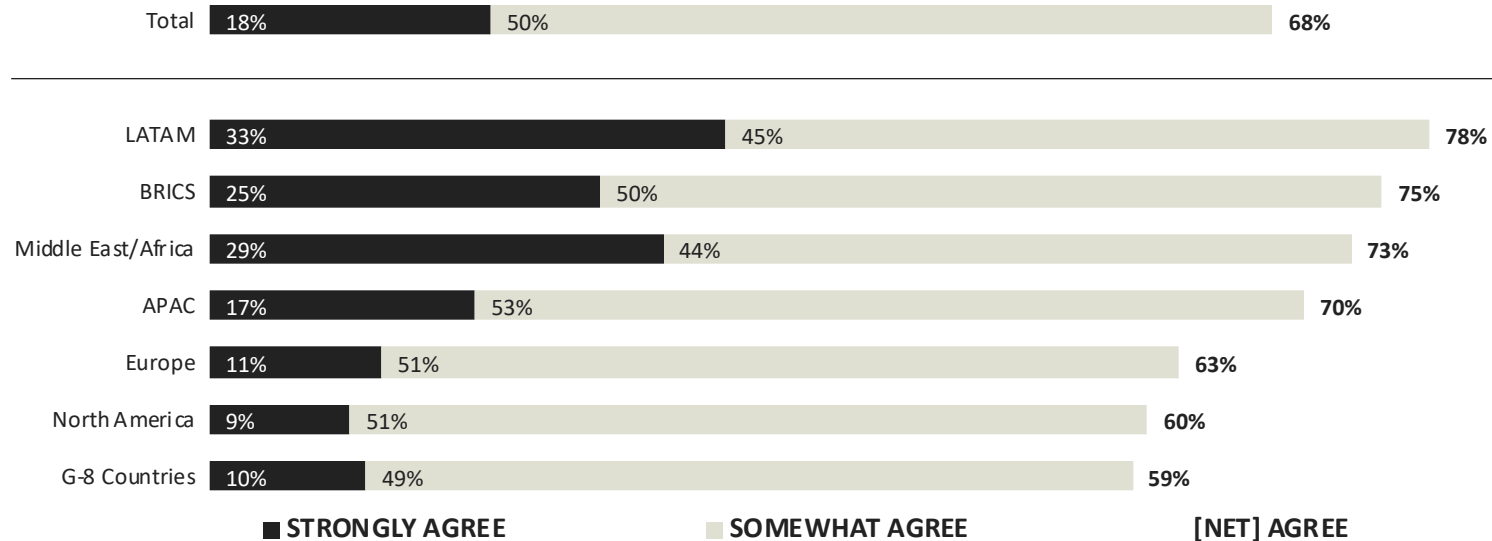
I DO ENOUGH TO PROTECT MY DATA

Relative to those who do not receive any treatment, fewer (-3 pts) *agree* that they do enough to protect their data, with much of the drop occurring in Turkey (-14) & Brazil (-12). Somewhat interestingly, agreement is much higher in Australia (+12).



I DO ENOUGH TO PROTECT MY DATA

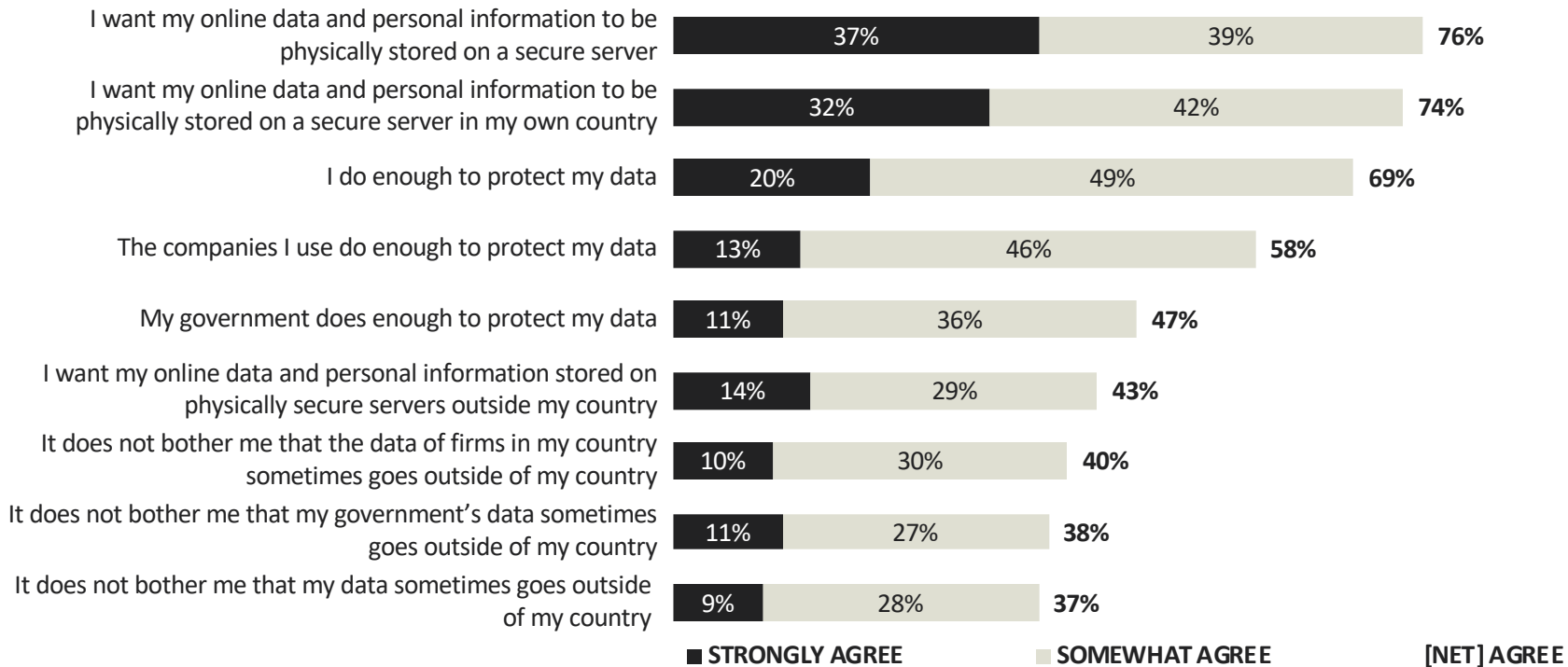
In all regions, save for APAC, there has been a decline in the proportion who *agree* that they do enough to protect their data, with the most substantial drops occurring in LATAM, the Middle East & Africa (-6 pts apiece).





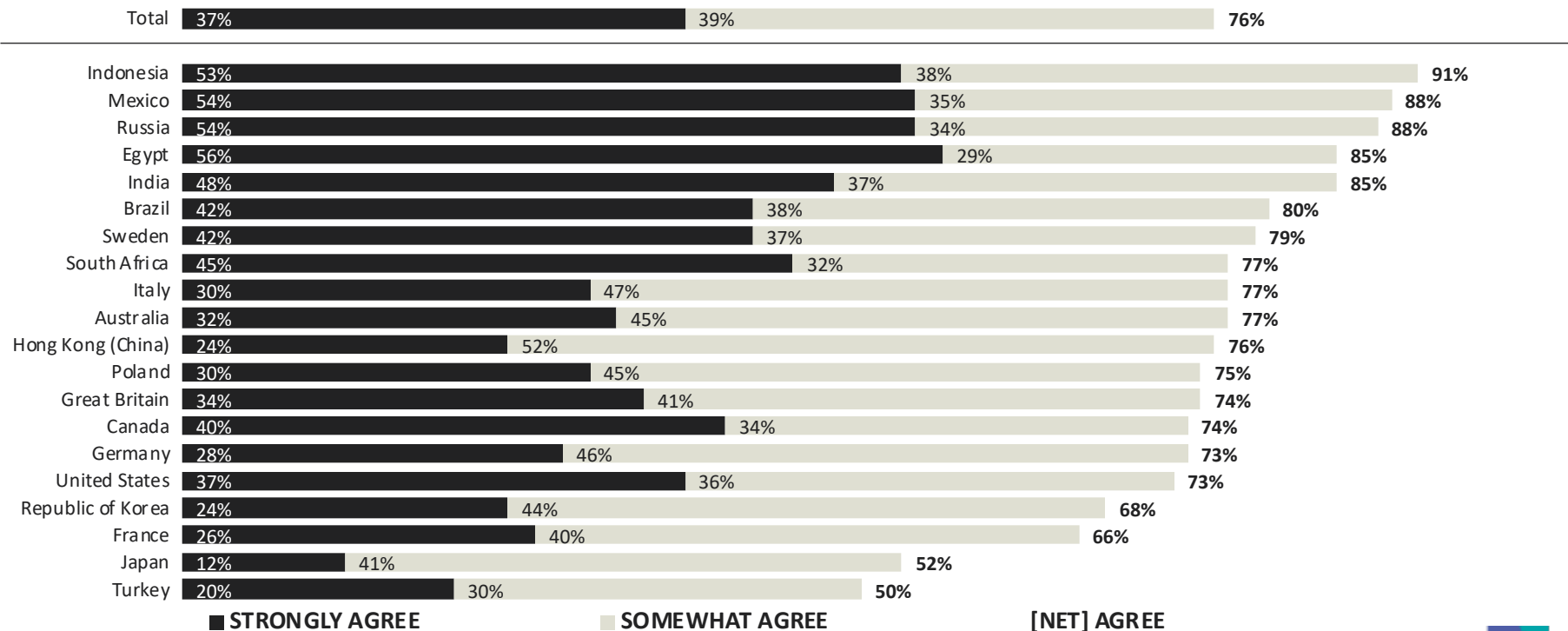
GROUP 4: BOTH TREATMENTS

Overall, those who receive both treatments tend to be more likely to *agree* that they are not bothered by cross-border data flows, be it of their own data (+2 pts), government data (+3), or data from firms in their economy (+4), relative to those who receive no treatment. And yet they are less likely to *agree* that their government, the companies they deal with, and they themselves are doing enough to protect their data (-2 on all three counts).



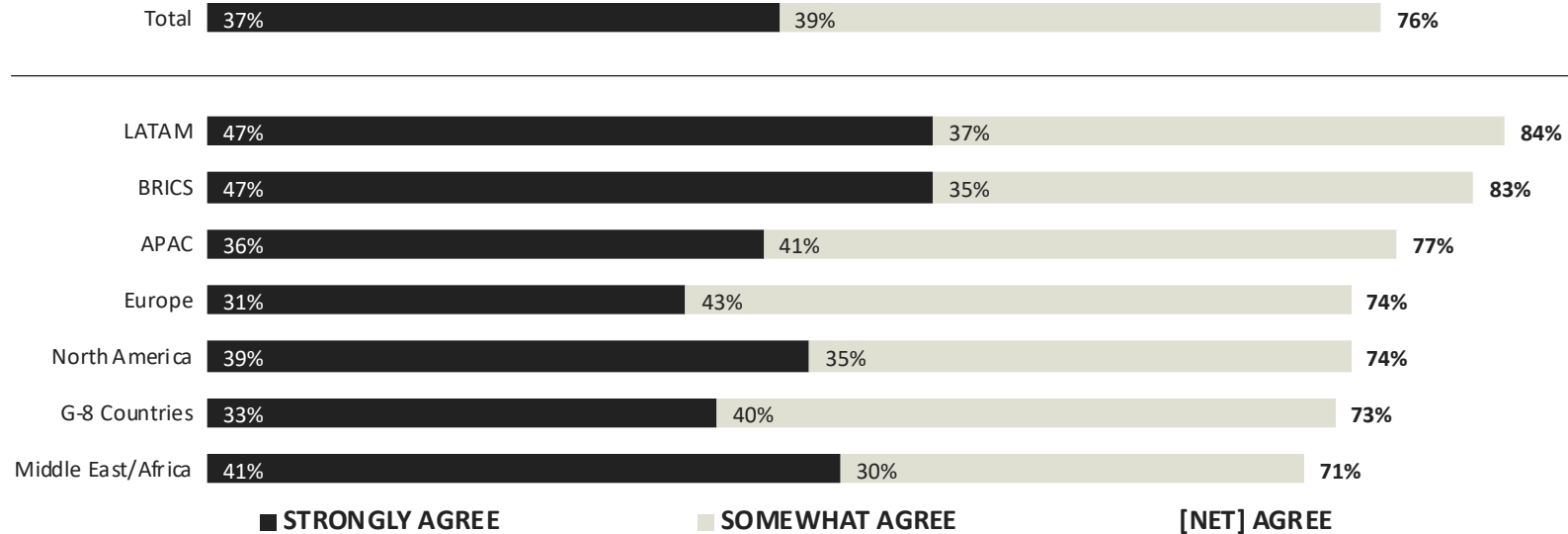
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER

On balance, exposure to both treatments makes global citizens no more or less likely to *agree* that they would like to have their online data & personal information to be physically stored on a secure server, though there are sizeable shifts in opinion in Turkey (-11 pts), Australia (+9) & Poland (-9), specifically.



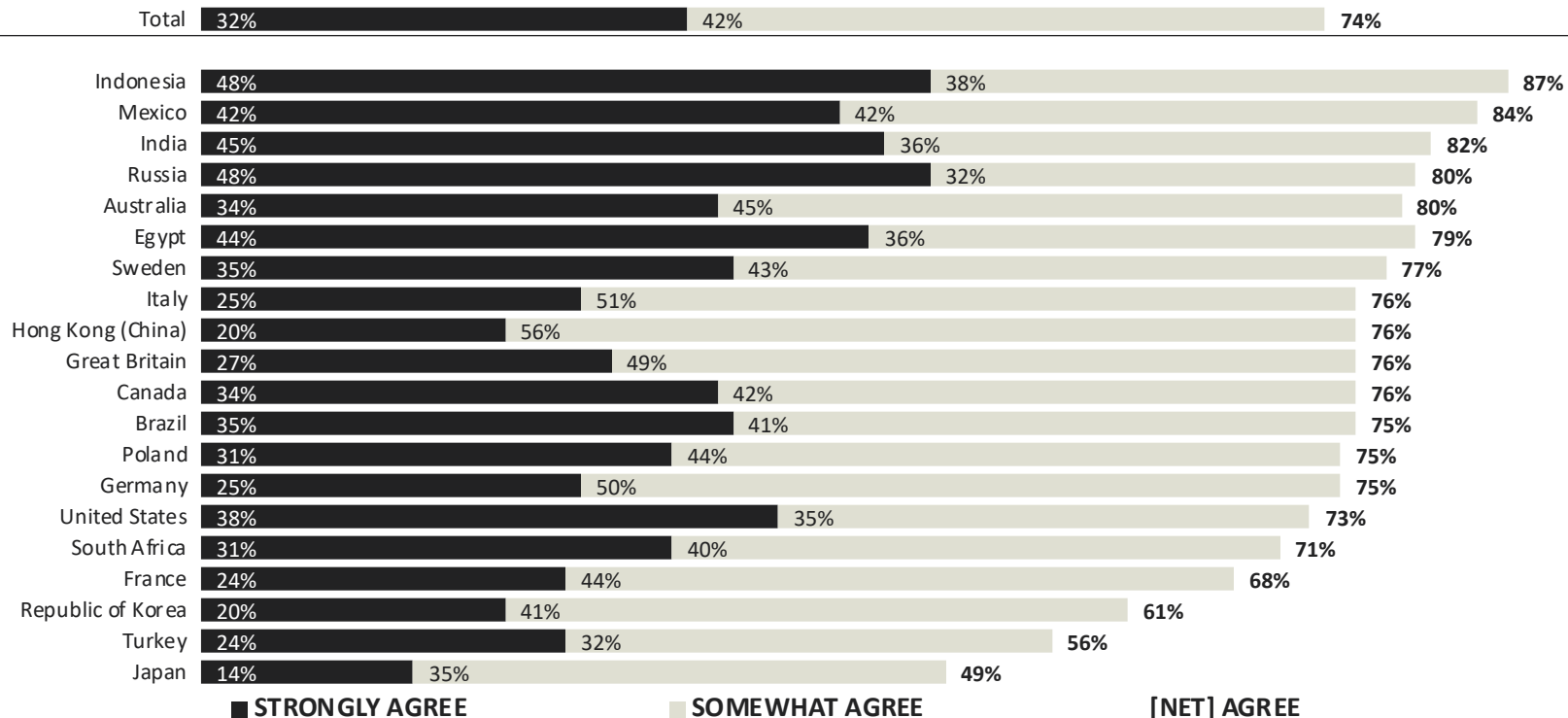
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER

Opinions are relatively unchanged in most economies, relative to the untreated group, with the most notable shift occurring in North America (+4 pts).



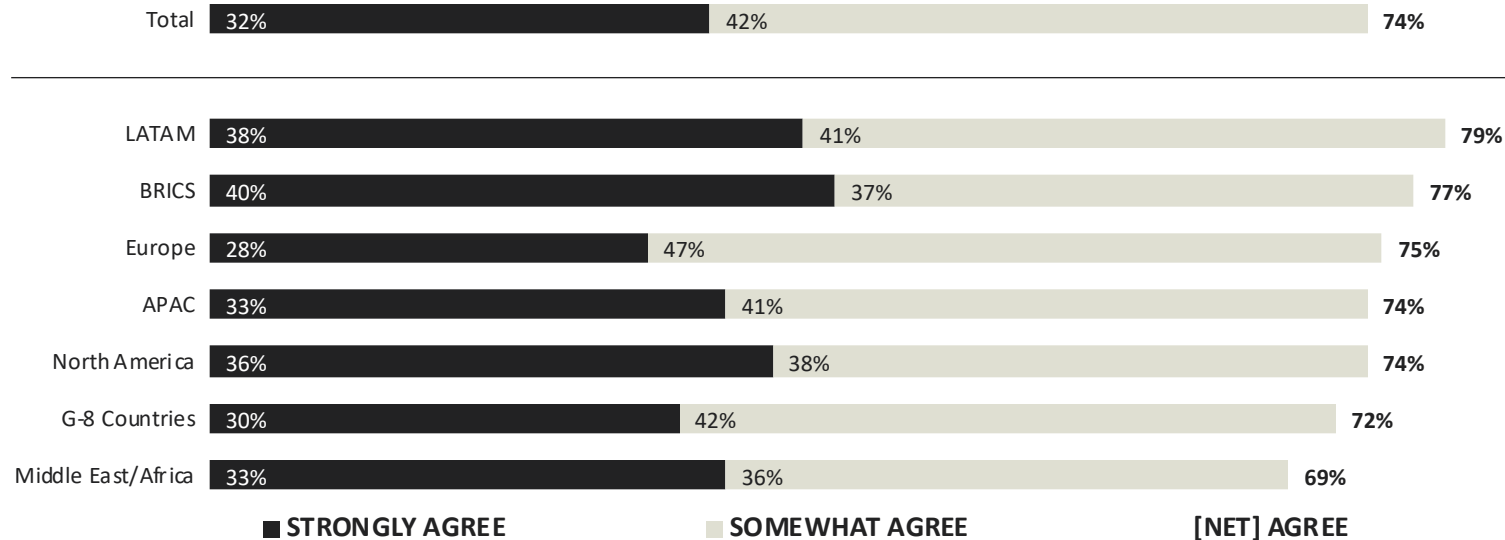
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER IN MY OWN ECONOMY

On balance, there is little variation, relative to the untreated group. However, there are some exceptions as those in Australia (+12 pts) & Mexico (+10) are exceptionally more likely to *agree* that they would prefer to have their online data & personal information to be physically stored on a secure server in their own economy.



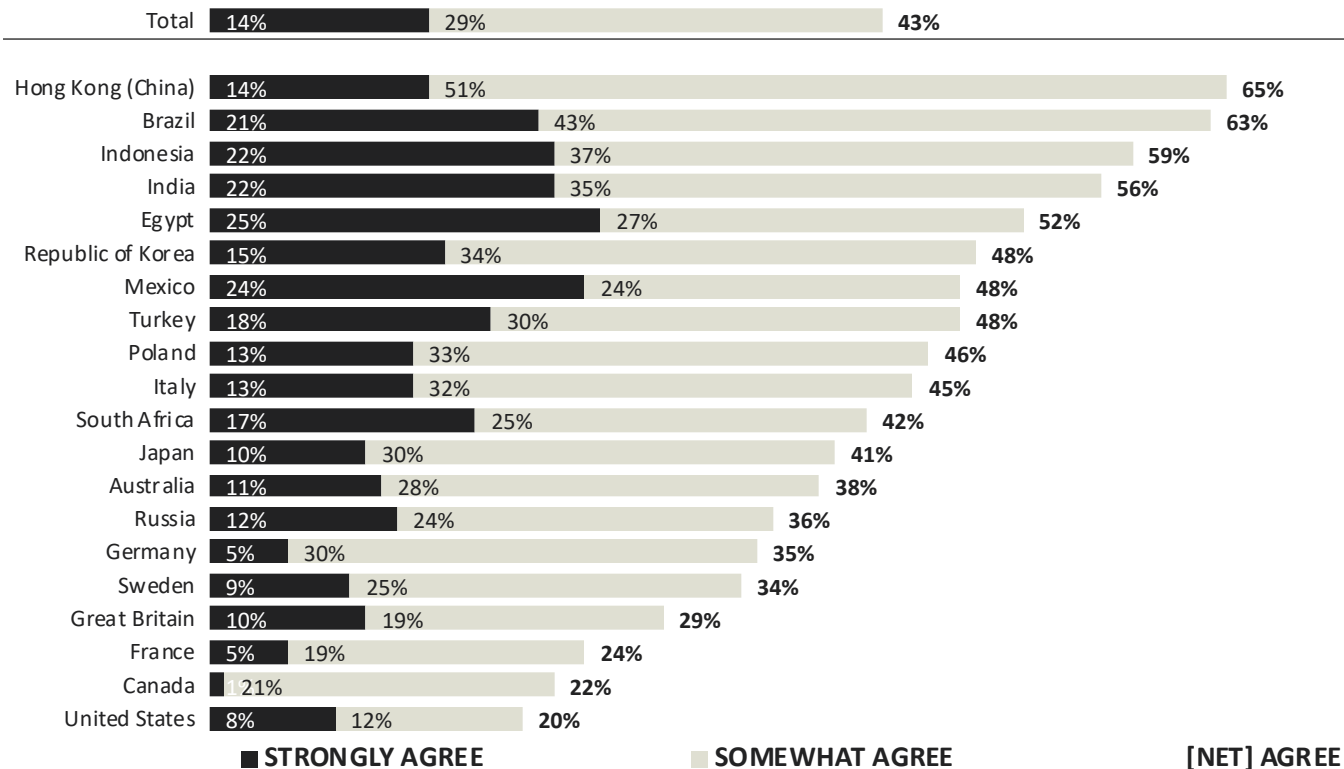
I WANT MY ONLINE DATA AND PERSONAL INFORMATION TO BE PHYSICALLY STORED ON A SECURE SERVER IN MY OWN ECONOMY

Aside from the LATAM economies (+4 pts), there is little variation in opinions, relative to the untreated group, in terms of the level of agreement about wanting online data & personal information to be physically stored on a secure server in their own economy.



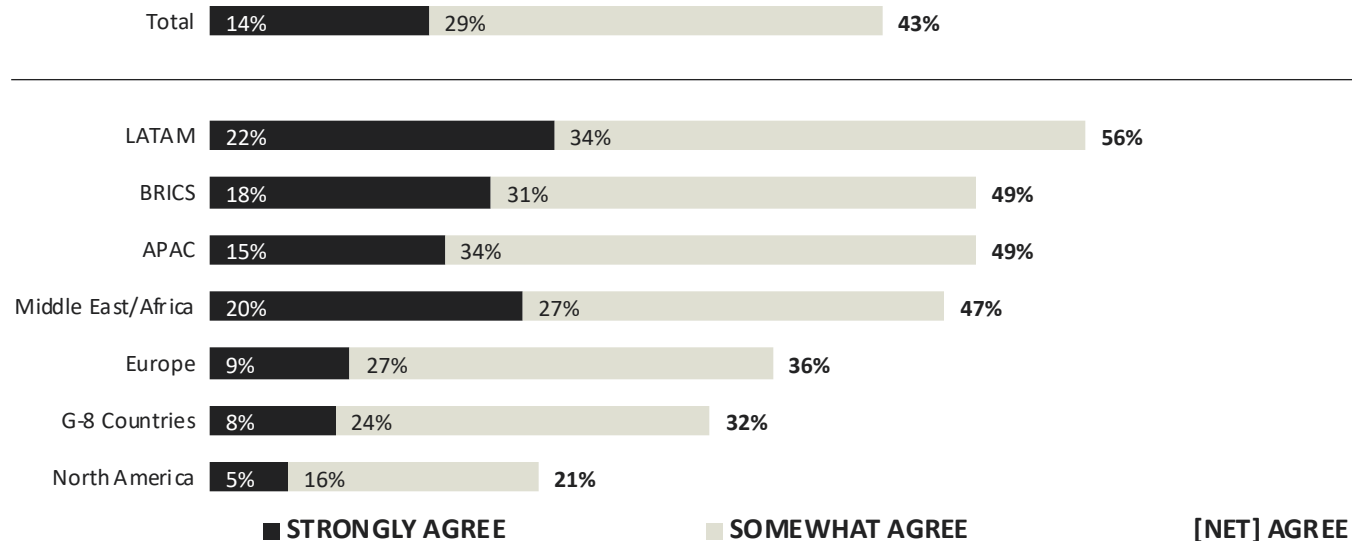
I WANT MY ONLINE DATA AND PERSONAL INFORMATION STORED ON PHYSICALLY SECURE SERVERS OUTSIDE MY ECONOMY

Overall, global citizens who receive both treatments are a little more inclined to *agree* that they would prefer to have their online data & personal information stored on physically secure servers outside of their economy. There have been substantial shifts in both directions, relative to the untreated group, led by Australia (+11 pts) & the US (-10).



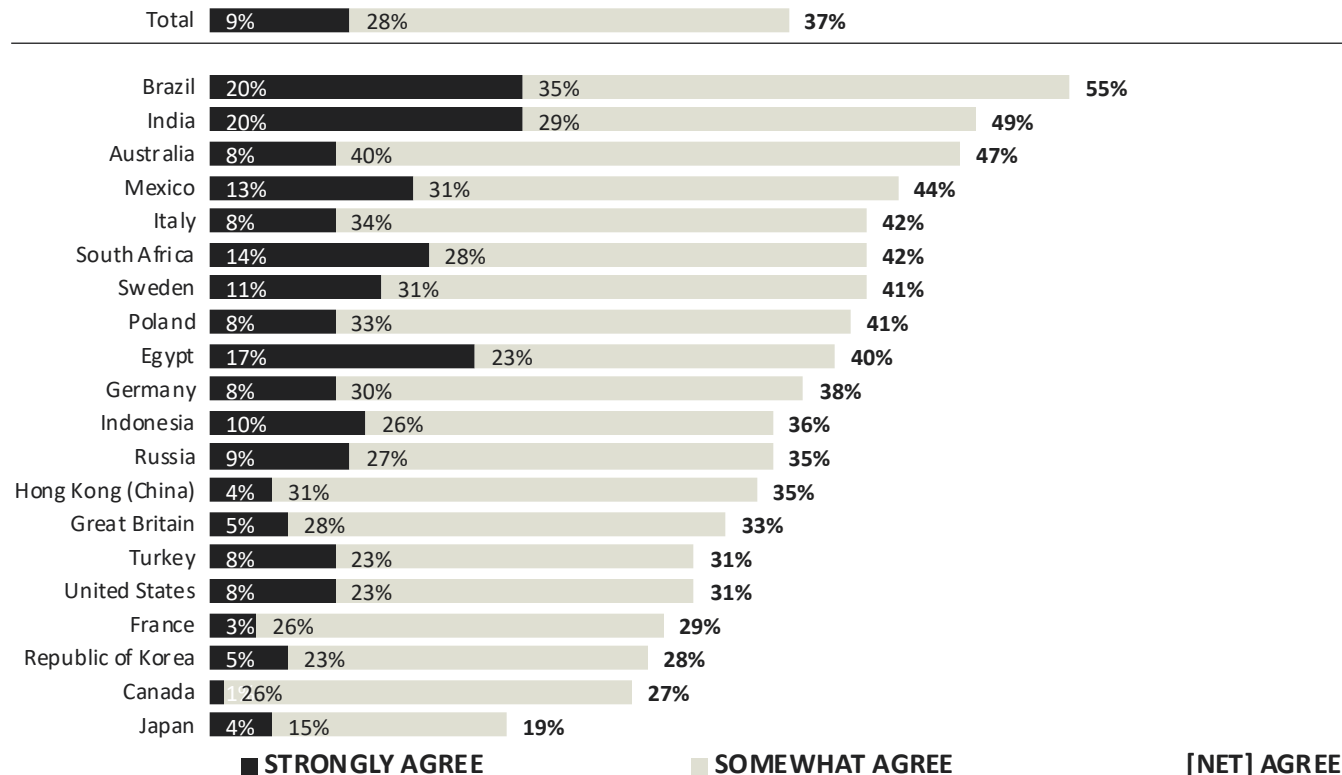
I WANT MY ONLINE DATA AND PERSONAL INFORMATION STORED ON PHYSICALLY SECURE SERVERS OUTSIDE MY ECONOMY

Regionally, the greatest movements in opinion, relative to the untreated group, are occurring in LATAM (+5 pts), the Middle East & Africa (-4).



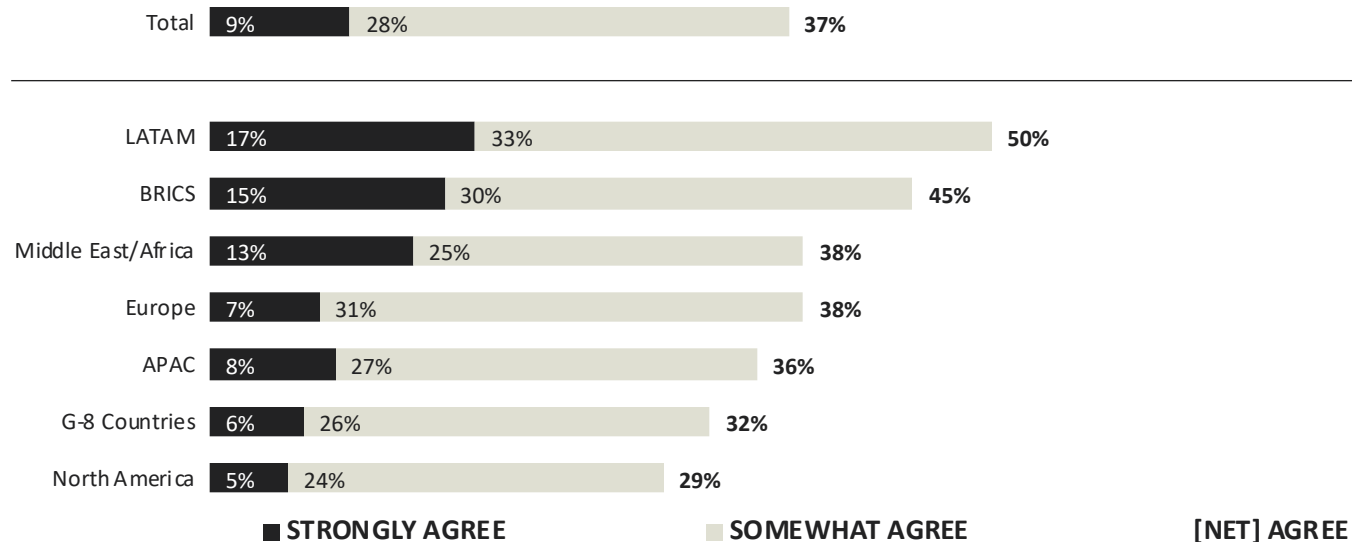
IT DOES NOT BOTHER ME THAT MY DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

Overall, those who receive both treatments are slightly more inclined, compared to those with no treatments, to *agree* that they are not bothered if their data sometimes leaves the economy, led by Australia (+20 pts) & Canada (+11).



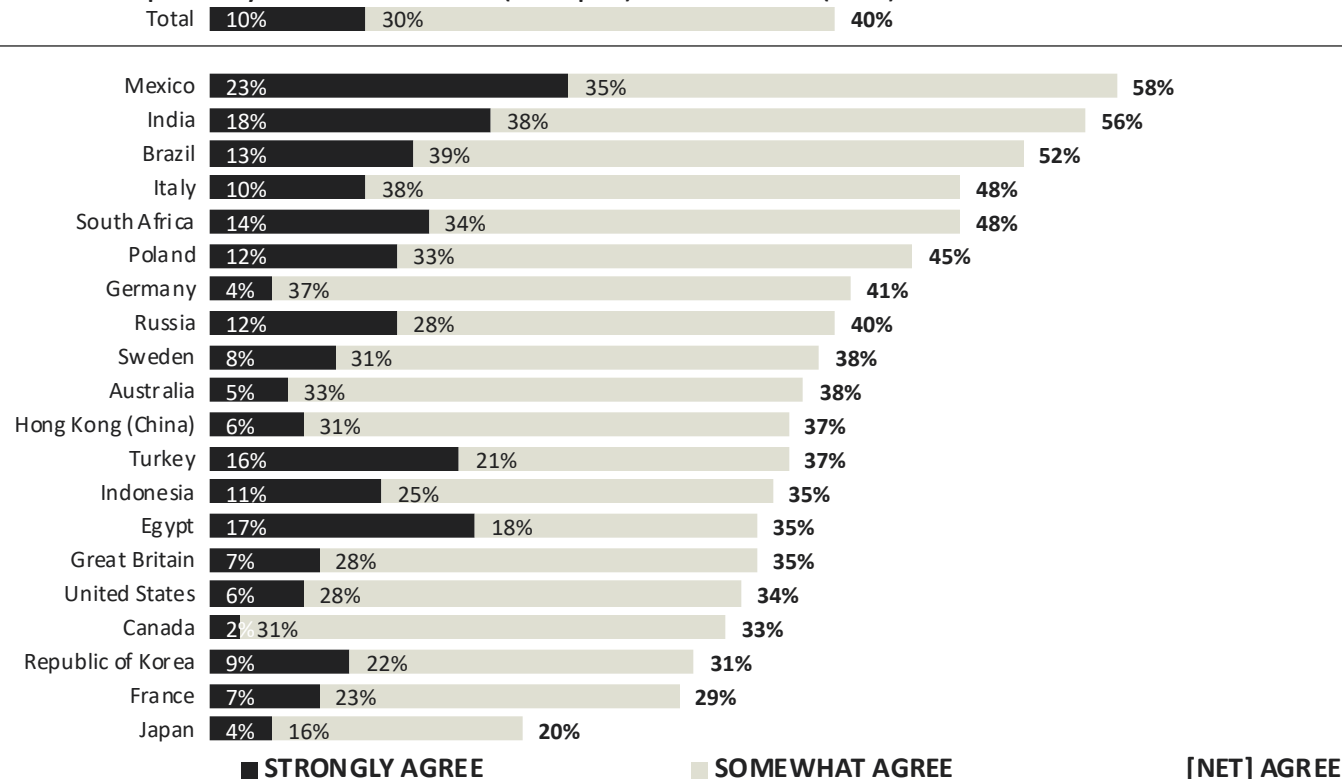
IT DOES NOT BOTHER ME THAT MY DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

Among those who receive both treatments, those in the Americas (LATAM, +7 pts & North America +5 pts) are driving much of the increase, relative to their counterparts receiving no treatments.



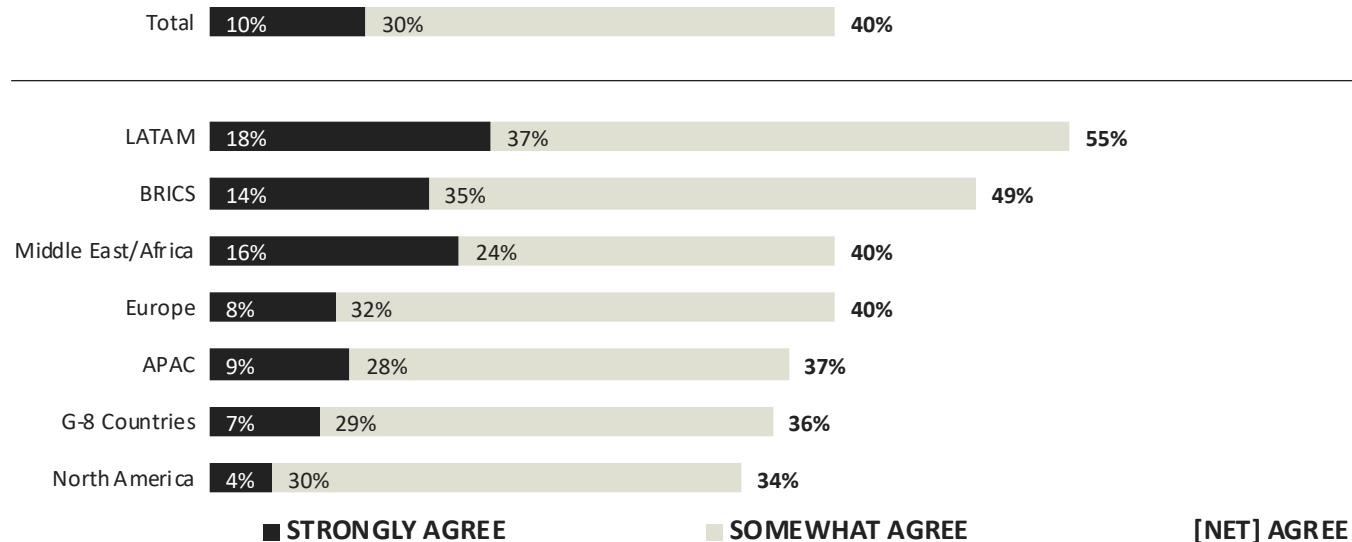
IT DOES NOT BOTHER ME THAT THE DATA OF FIRMS IN MY ECONOMY SOMETIMES GOES OUTSIDE OF MY ECONOMY

After receiving both treatments, there is a substantial increase in the proportion of global citizens who *agree* that they are not bothered by the cross-national data flows of firms in their economy, relative to the untreated group. This is especially true in Canada (+14 pts) & Australia (+11).



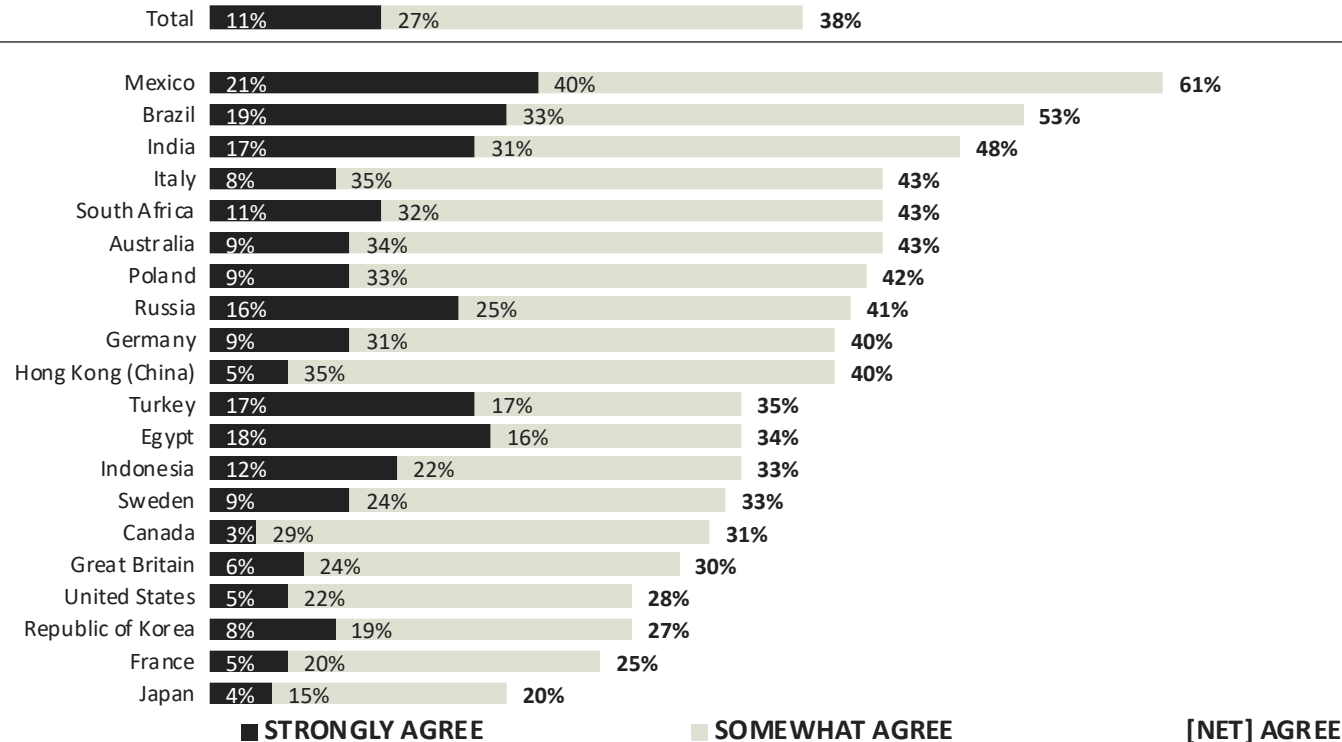
IT DOES NOT BOTHER ME THAT THE DATA OF FIRMS IN MY ECONOMY SOMETIMES GOES OUTSIDE OF MY ECONOMY

Once again, the Americas (North America, +10 pts & LATAM, +7 pts) are largely driving the increase in scores, relative to the untreated group.



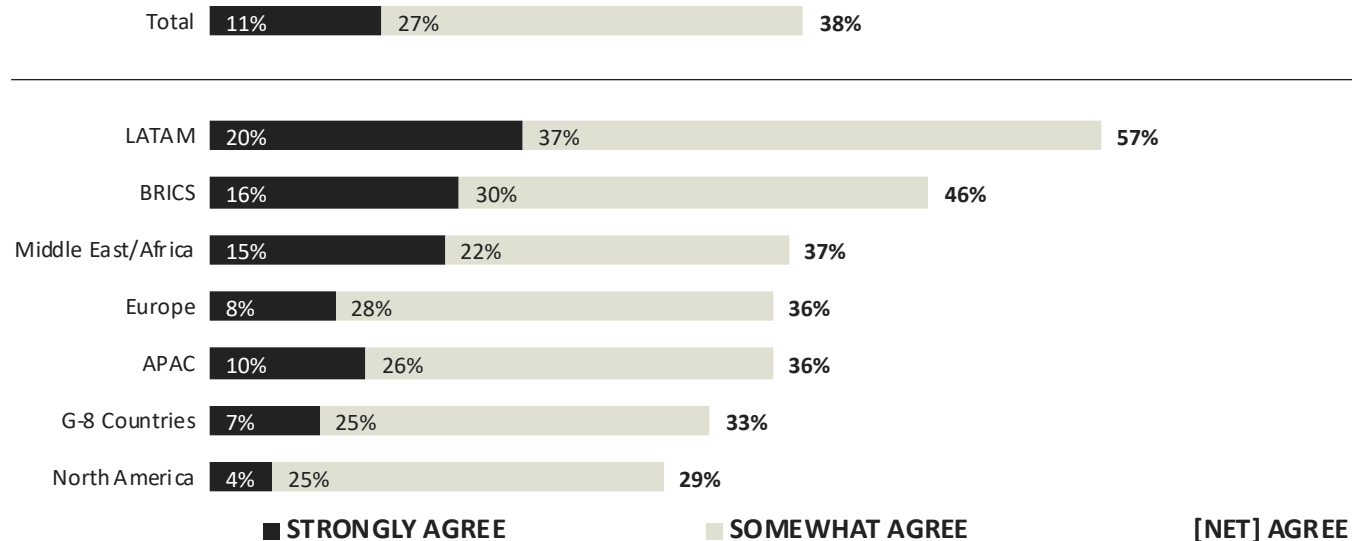
IT DOES NOT BOTHER ME THAT MY GOVERNMENT'S DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

Relative to the untreated group, a substantially higher proportion (+3 pts) of those receiving both treatments *agree* that they are unbothered by the fact that their government's data sometimes leaves the economy, led by sizeable increases in Canada (+16 pts), Australia (+16) & Mexico (+12).



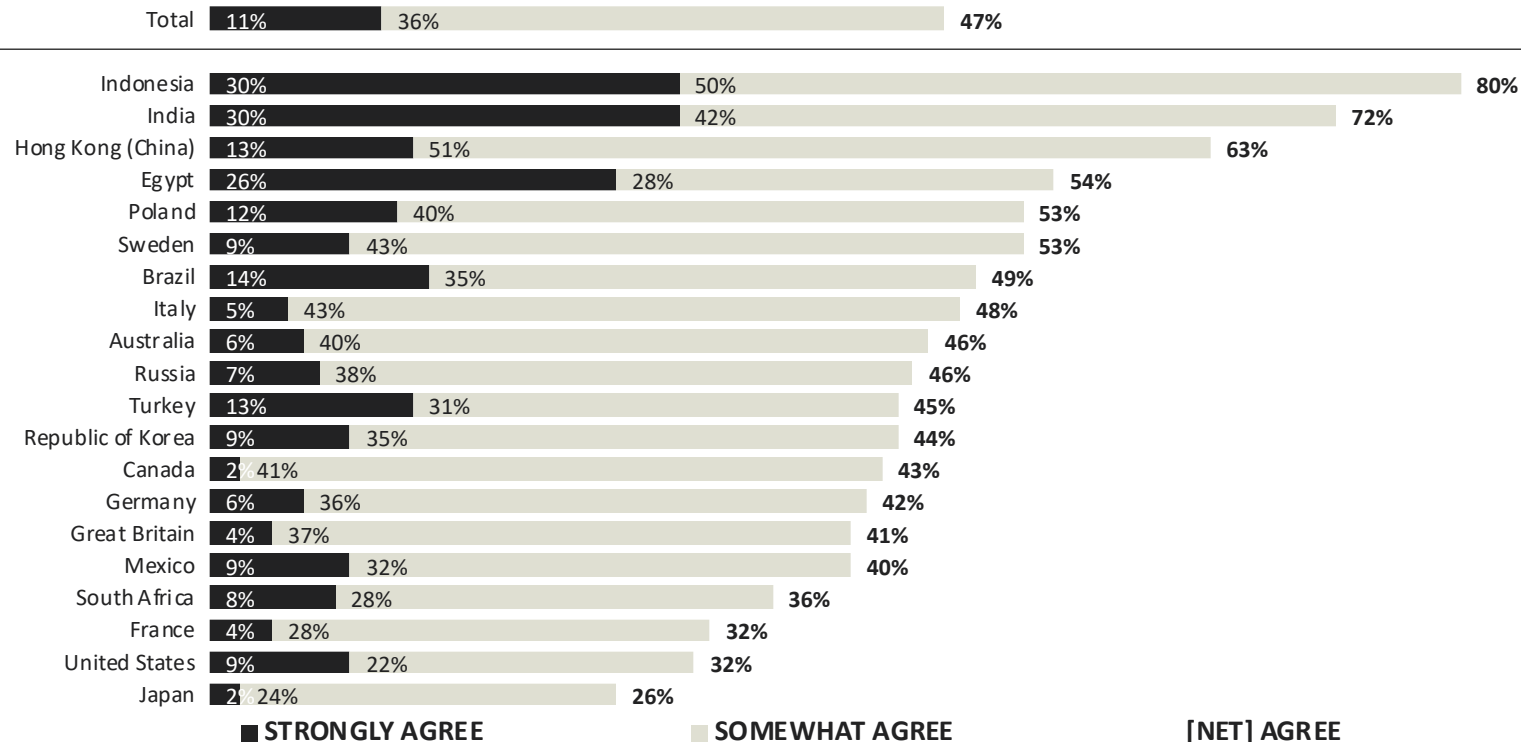
IT DOES NOT BOTHER ME THAT MY GOVERNMENT'S DATA SOMETIMES GOES OUTSIDE OF MY ECONOMY

The Americas (LATAM, +9 pts & North America, +7 pts), continue to be responsible for much of the increase, relative to the untreated group.



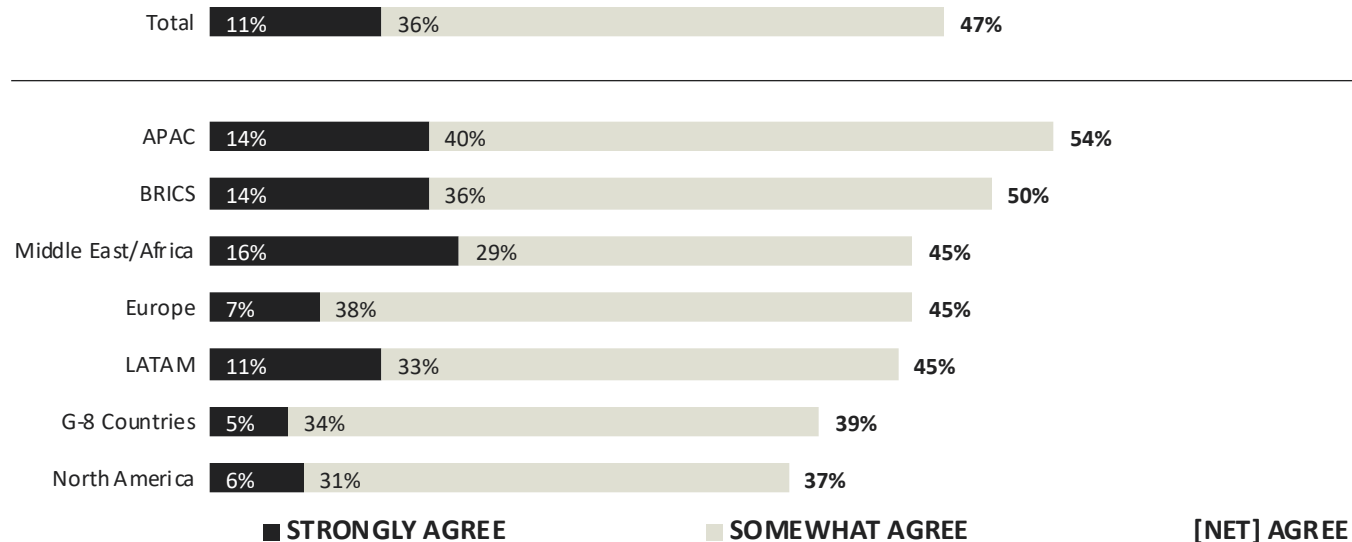
MY GOVERNMENT DOES ENOUGH TO PROTECT MY DATA

In comparison to the untreated group, the proportion of global citizens who *agree* that their government does enough to protect their data is slightly lower (-2 pts). In most economies, fewer *agree* with this statement, though the opposite is true in Australia, where the greatest variance in opinion is noted (+11 pts).



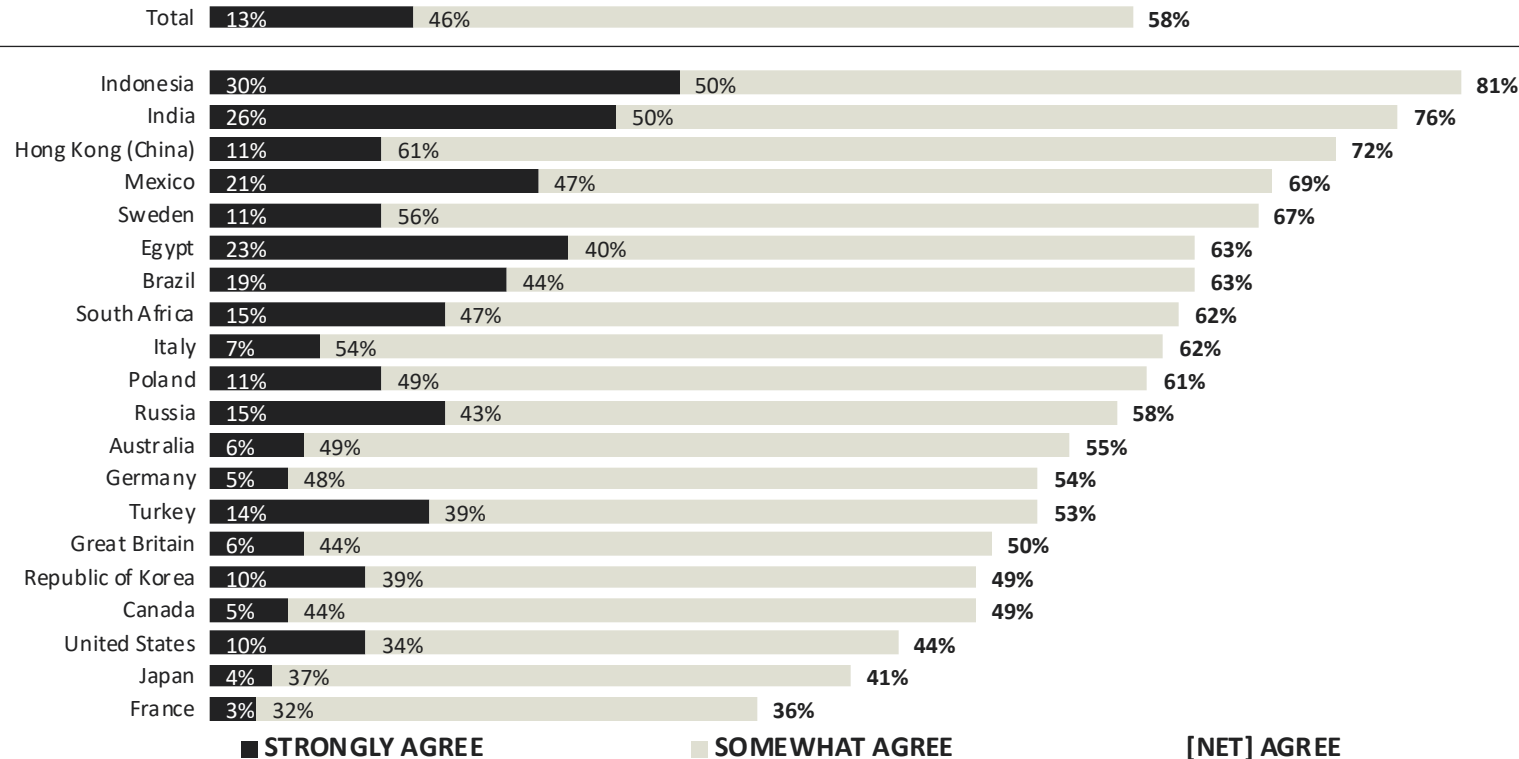
MY GOVERNMENT DOES ENOUGH TO PROTECT MY DATA

In all regions, save for APAC, fewer who receive both treatments *agree* that their government does enough to protect their data, relative to those who receive no treatment. The greatest difference is observed in the Middle Eastern & African economies (-8 pts).



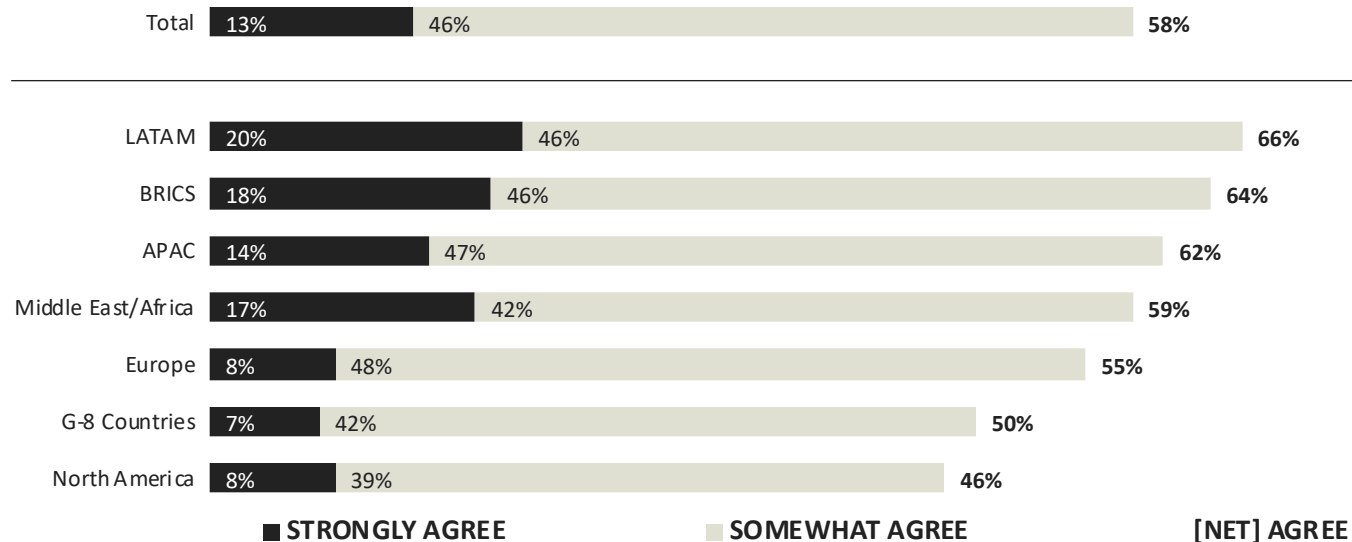
THE COMPANIES I USE DO ENOUGH TO PROTECT MY DATA

Those who receive both treatments tend to be less likely to *agree* that the companies they use do enough to protect their data, compared to those receiving no treatments (-2 pts). Opinions between the two groups are the most divergent in Poland (-10), Brazil (-9), the US (-9), Australia (+8) & Egypt (-8).



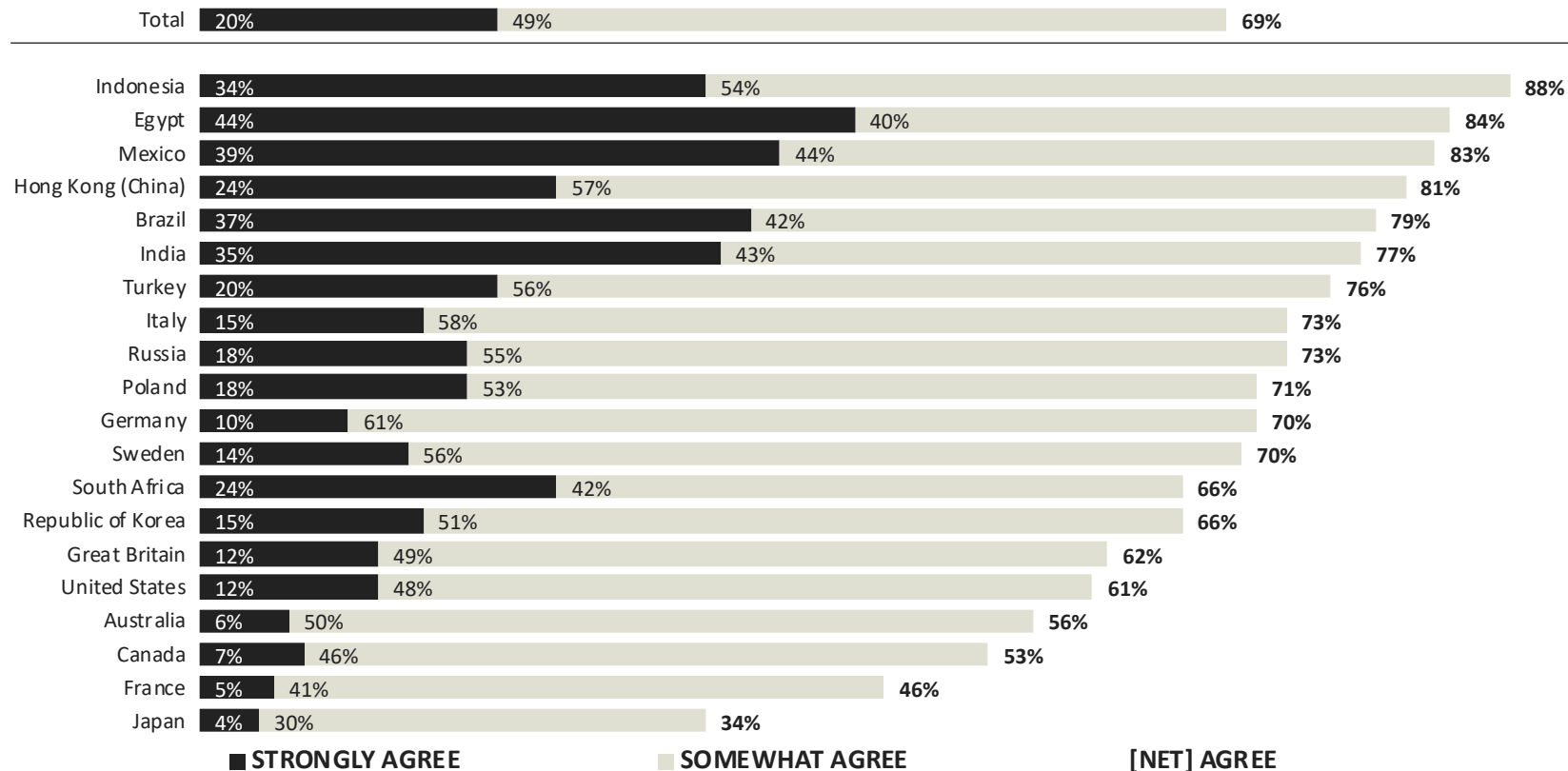
THE COMPANIES I USE DO ENOUGH TO PROTECT MY DATA

With the exception of the APAC economies, fewer of those who receive both treatments *agree* that the companies they use do enough to protect their data, compared to the untreated group.



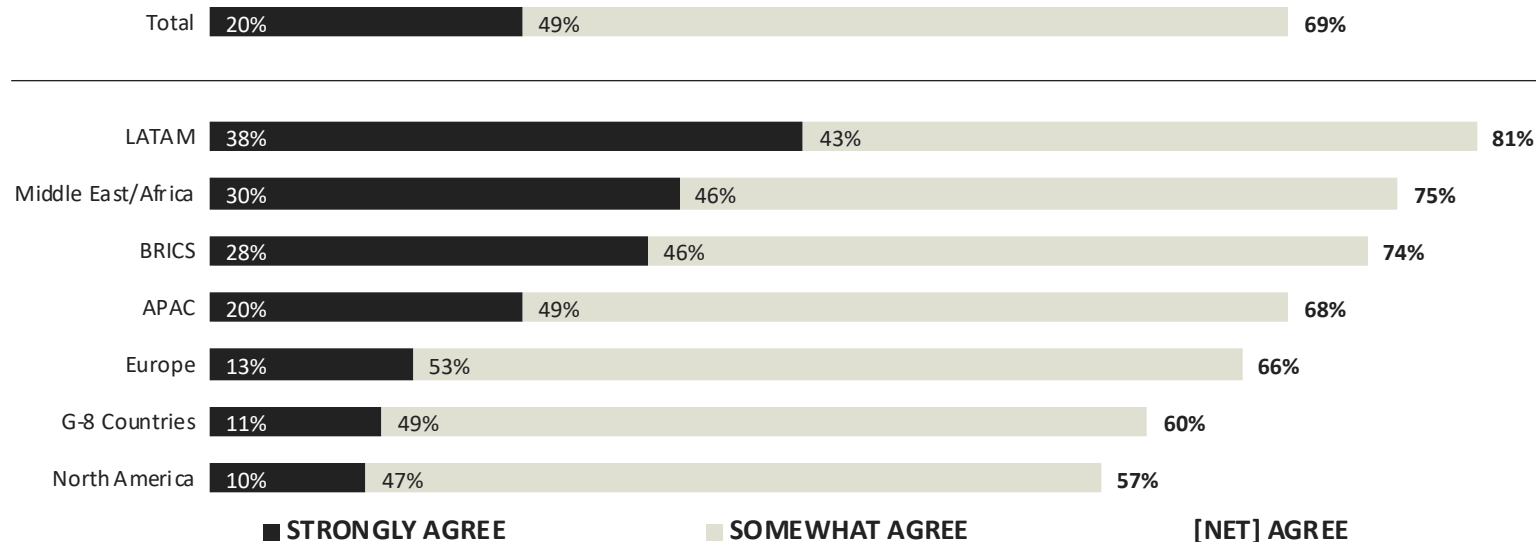
I DO ENOUGH TO PROTECT MY DATA

Overall, there is a small drop (-2 pts) in the proportion of global citizens who feel as though they are doing enough to protect their own data, relative to the untreated group, with Canadians leading this decline (-12 pts).



I DO ENOUGH TO PROTECT MY DATA

Europeans (no difference) aside, there is a drop in the proportion who *agree* that they do enough to protect their data in all regions, relative to the untreated group. Opinions diverge the most in North America (-6 pts).



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