

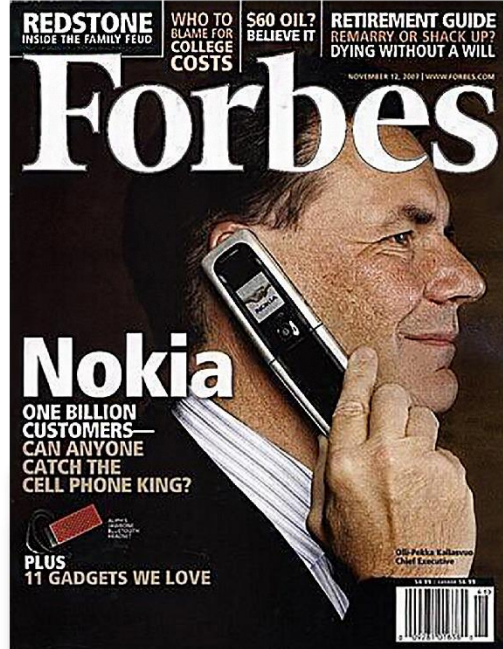
**ESOMAR**



The background is a complex, abstract composition. It features a dense array of multi-colored light streaks in shades of red, orange, yellow, green, and blue, radiating from the center towards the edges. Overlaid on these streaks is a faint, white grid pattern that creates a sense of depth and structure. The overall effect is one of high energy and digital connectivity.

# **The Data Revolution**

## What were you doing in 2007?



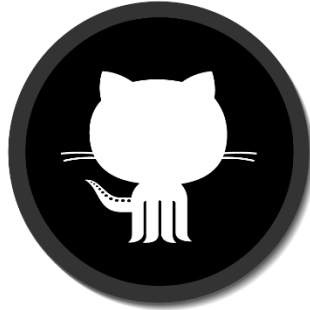
9th January 2007, launch of the iPhone



## 2007, the year the world was reshaped



Vmware OS  
(Rosseta Stone)  
Cloud  
Computing



GitHub, Open-source platform/  
Collaborative software



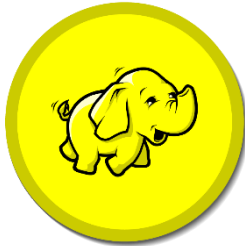
Android by Google  
Smartphones  
scale globally



"Software-enable  
networks"  
to expand cellular traffic



Intel produces "non-silicon"  
microchips  
Moore's Law is broken



Hadoop  
Big Data



Facebook out of  
universities



Twitter/ Airbnb/  
Change.org/ Bitcoin



Kindle by Amazon/  
Watson by IBM  
(Cognitive computer)  
AI/ Machine learning

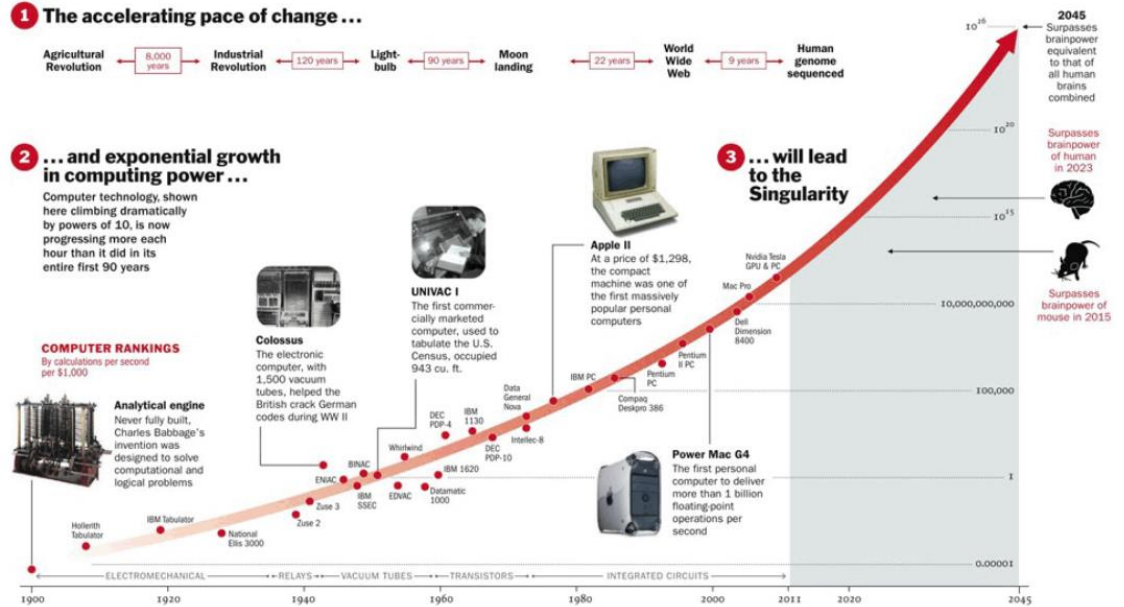


"Clean power"  
revolution (solar,  
wind, biofuels, LEDs,  
energy efficiency,  
electric cars)

## The Market



## Mother Earth



## Moore's Law



**Quiebre del orden: la crisis política sin final en Perú**

Politics



GeoPolitics

**Workplace Changes Are Accelerating: Why And What Millennials Should Do About It**



Larry Alton Under 30  
I cover changes to the American workplace.



Workplace



Ethics



Community

# ESOMAR

## The Digital Life

# 2019 *This Is What Happens In An Internet Minute*









## Critics warn of multimedia 'hell'

September 14, 1995

Web posted at: 5:50 p.m. EDT

OSAKA, Japan (CNN) -- Some telecommunications experts fear the multimedia revolution is setting the stage for the eventual breakdown of society. The gloomy forecast was aired in a debate at a conference of the International Institute of Communications in Osaka.

American lawyer Delbert Smith said **the telecommunications revolution is about control and power.** "Hell is a loss of privacy, and nothing brings us closer to hell than telecommunications technology," he said. "We will all end up **consumers with no privacy in a technological world with no protections.**"

Debaters said that while the so-called information superhighway improves access to information, it also could destroy jobs, isolate women, and possibly lead to anarchy.

## Technology

Uber applies for patent to spot drunk passengers

## Kreditkartendaten von 380.000 British-Airways-Kunden gestohlen

Bei der britischen Fluglinie wurden Bankverbindungen und persönliche Daten von Hunderttausenden Kunden gestohlen. Es habe eine Panne bei der Online-Buchung gegeben.

6. September 2018, 22:26 Uhr / Quelle: ZEIT ONLINE, dpa, AFP, Reuters, vk / 11 Kommentare

# Cambridge Analytica and Facebook: The Scandal and the Fallout So Far

Revelations that digital consultants to the Trump campaign misused the data of millions of Facebook users set off a furor on both sides of the Atlantic. This is how The Times covered it.

## Apple CEO Tim Cook says data tracking is 'totally out of control'

Most people are oblivious to the amount of data being tracked, Cook tells CNN.

BY STEVEN MUIR / JUNE 4, 2018 6:46 PM PDT

## Dixons Carphone Reveals Huge Data Breach

NEWS 13/06/2018 11:01 BST | Updated 13/06/2018 11:30 BST

The company says there's no evidence of fraud.

George Bowden  
 HuffPost UK

The Guardian  
 UK politics Environment Education Society Science Tech Global development Cities Obituaries  
 Google records your location even when you tell it not to  
 Some services on Android and iPhone automatically stores your movements even after you pause the 'location history' setting  
 INCREASE YOUR INCOME BECOME A NON-EXEC  
 SHARE YOUR EXPERTISE  
 JOIN NOW

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## Privacy

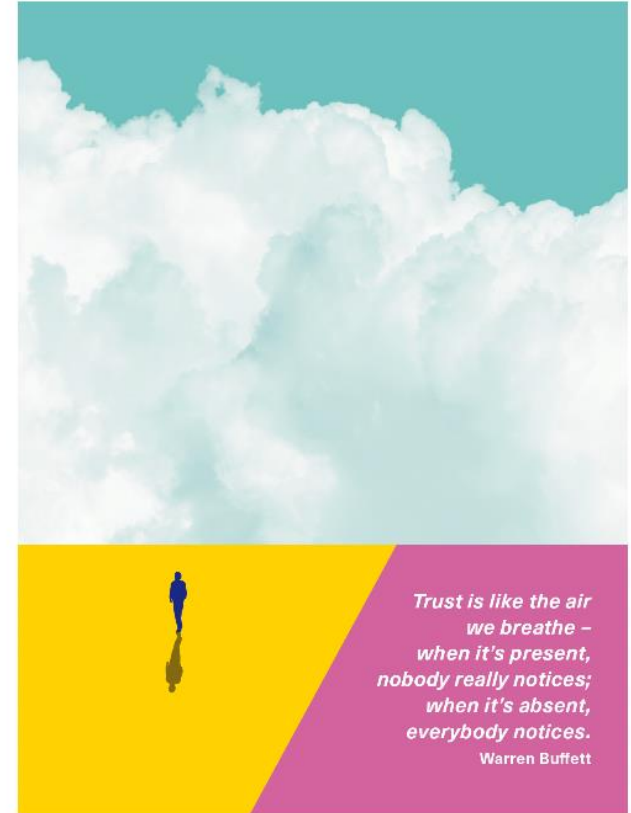
The New York Times  
Dec. 19<sup>th</sup> 2019





The Privacy Paradox  
September 2018

The Trust Paradigm  
September 2019





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# THE TRUST PARADIGM

Rule number 1: Transparency pays

**How do consumers really  
feel and behave about  
sharing personal and  
location data?**

and how can  
brands best  
serve them to  
build trust?

# What we did

- **Online** survey
- **10,000** respondents in **10** markets
- Survey by **Buzzback Research**
- Sample from **Cint**



**Levels of concern  
about sharing  
personal data  
digitally are high**

**3 OUT OF 4**

reported some level of  
concern about sharing  
personal information

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**Levels of concern  
about sharing  
personal data  
digitally are high**

**53%**

are in strong agreement  
with 'I am concerned about  
sharing my data digitally'

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**Levels of concern  
about sharing  
personal data  
digitally are high**

**4 IN 10**

do not like privacy practices  
of most data collectors

Concern lowest in Netherlands and Germany,  
highest in China and Brazil

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**Most don't feel  
able to be  
responsible for  
their data**

**85%**

accept it is their  
responsibility to be  
aware of who they  
share data with

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**Most don't feel  
able to be  
responsible for  
their data**

**79%**

agree it's 'difficult to find  
information about how best  
to protect my privacy'

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**People commonly  
share their  
location data**

**70%**

of consumers  
around the world  
share their location  
data when asked

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**But that doesn't  
mean everyone  
is happy about it**

**40%**

only share location or personal data  
when they have 'no other option'

Sharing data is something they have to  
put up with in order use digital services

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**Only 33% are  
confident they  
know what is done  
with their data**

**6<sub>IN</sub>10**

people had their data  
used inappropriately in  
last two to three years

- Email hacked
- Bank account or credit card hacked
- Phishing
- Personal details leaked
- Spam

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**Transparency  
is key; brands  
*must* say when  
they are using  
location data**

**90%**

agree that 'it is the responsibility of  
the data collector to clearly tell me  
they are using my location data'

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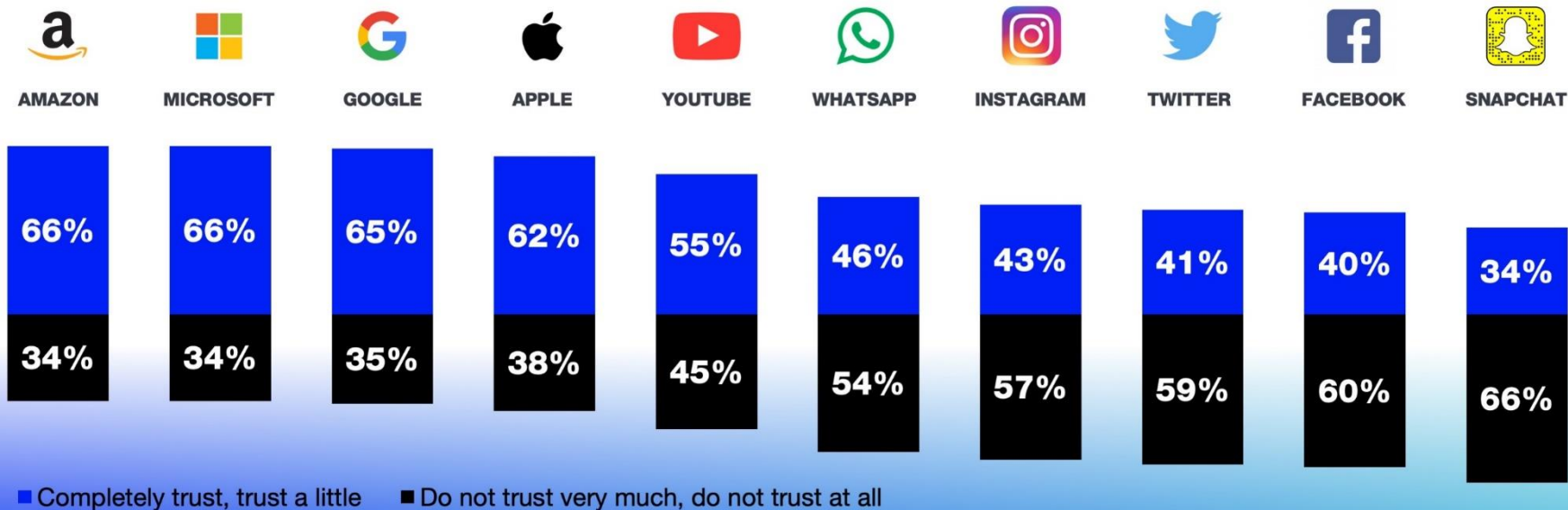


**Transparency  
is key; brands  
*must* say when  
they are using  
location data**

**MORE  
THAN 2/3**

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

# Two-thirds of consumers trust Amazon, Microsoft, Google and Apple, social media suffers a lack of trust



# Good data practices can boost sales

**A third** agreed strongly they are more willing to buy or use services from companies that handle personal data as they should.

In China it is **61%**, and in India, **52%**.


Only **one in five** disagreed globally.



## French consumers are less trusting, so are reluctant to share their data



\*Agree strongly 8-10 on 10 point scale

	Actual 2019	
	Global	
*Sharing personal information is vital and necessary in our digitalized and connected world	28%	15%
*Laws and regulations ensure that no misuse of:		
Location data happens	27%	17%
Personal data happens	30%	23%
*I trust the services/apps/ services I use to handle my data as they should:		
Location	27%	16%
personal	28%	25%

- Trust is also comparatively low in France, both in the laws and regulations to protect against misuse, but also the data collectors.

The image shows the cover of the 'Global Market Research 2019' report. It features a vibrant purple and blue abstract design with a prominent black diagonal line. The text is white and positioned in the upper left corner.

# Global Market Research 2019

An ESOMAR Industry Report

in cooperation with BDO Accountants & Advisors

ESOMAR

The global Market,  
Opinion and Social  
Research and Data  
Analytics industry is  
valued at

\$80Bn

Source: ESOMAR GMR 2019









## The “Digital effect” on the insights industry

### Share of Market Research Spend by Method

**Analytics**

**Online  
methods**

**Other  
methods**



André Comte-Sponville  
Paris, 1952



**The willingness to  
understand people**



**The Ethical Behaviour**





**TECHNOLOGY  
IS NOT NEUTRAL**

## Update report into adtech and real time bidding

20 June 2019



“...concerns that the creation and sharing of personal data profiles about people to the scale we've seen, feels disproportionate, intrusive and unfair, particularly when people are often unaware it is happening”.



**Elizabeth Denham**  
Information Commissioner

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WORLD RESEARCH

ICC  
INTERNATIONAL  
CONFEDERATION  
OF COMMERCE  
OF MARKETS  
The world business organization

# ICC/ESOMAR International Code

on Market, Opinion and Social Research and Data Analytics

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Briefing questions  
when considering tools and  
services for unstructured data –  
text, images, audio, and video

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## Who Owns the Data?

{...?}

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### The Trust Paradigm



*Trust is like the air  
we breathe –  
when it's present,  
nobody really notices;  
when it's absent,  
everybody notices.*

Warren Buffett





# TENOCHTITLAN 1519



**Gerónimo de  
Aguilar**

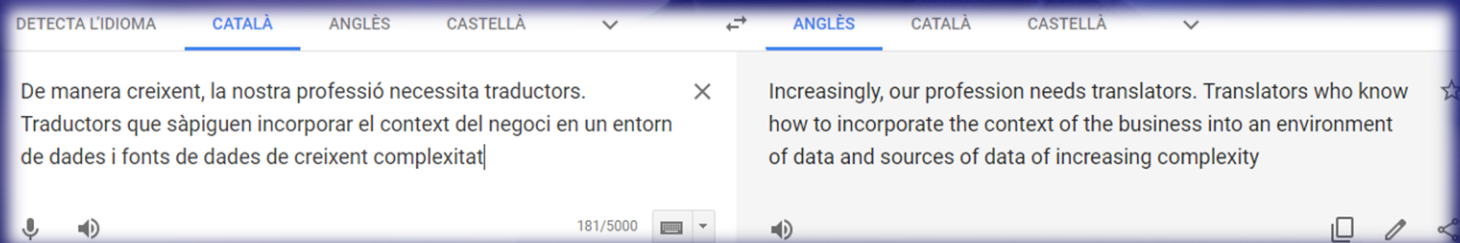


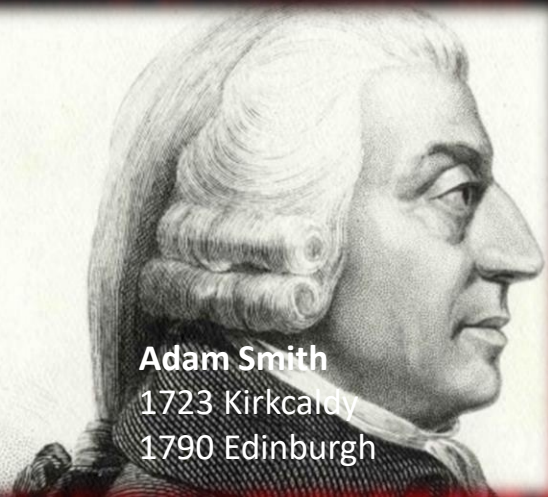
**Malintzin  
Malinche**



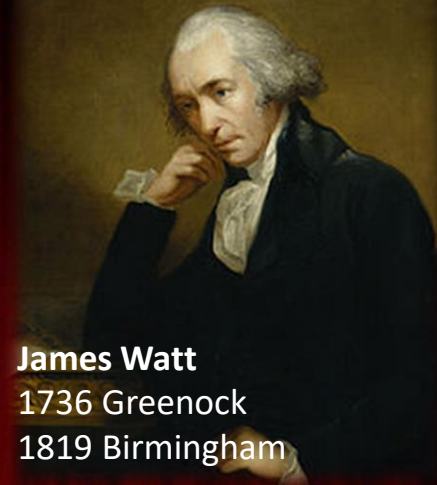
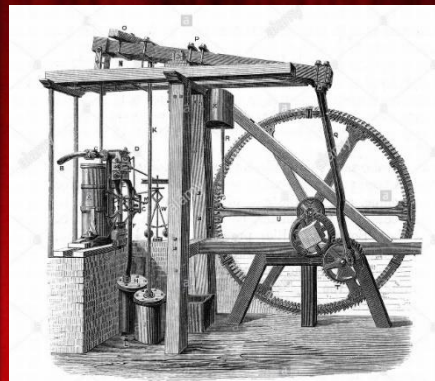
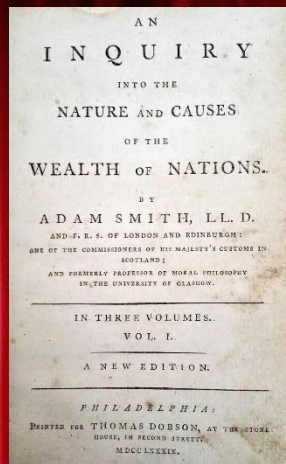


# Translators, the new most needed role



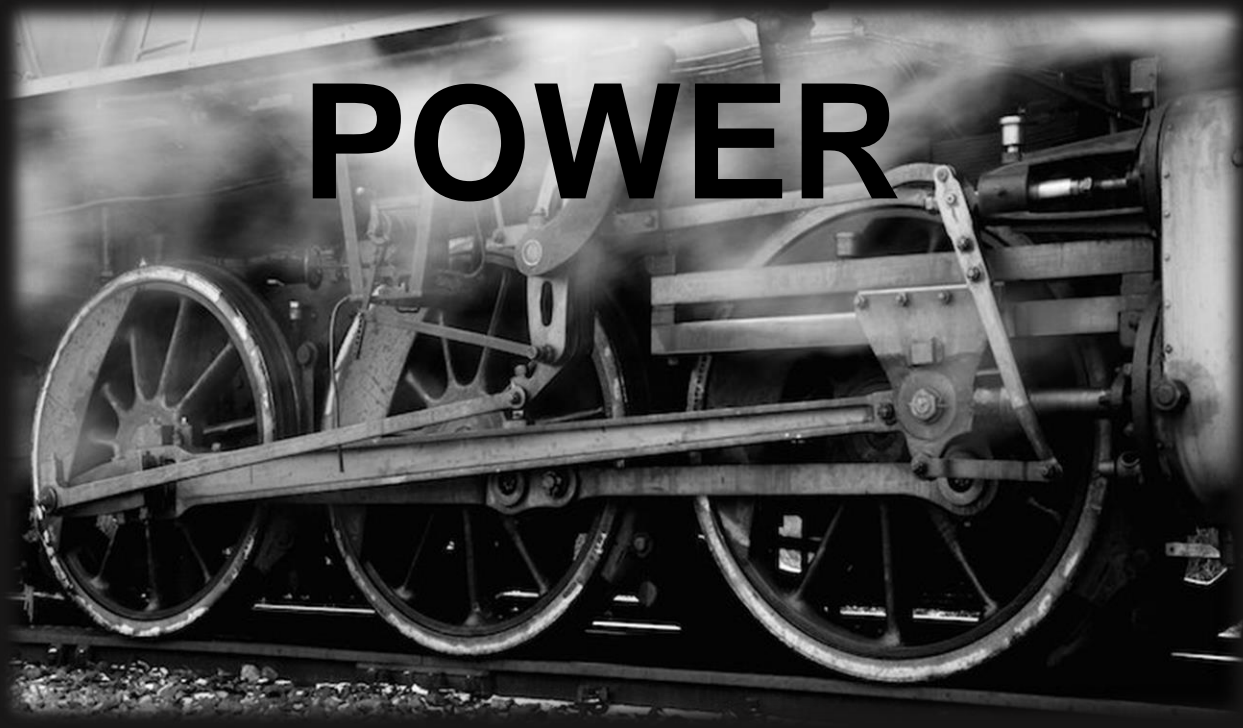
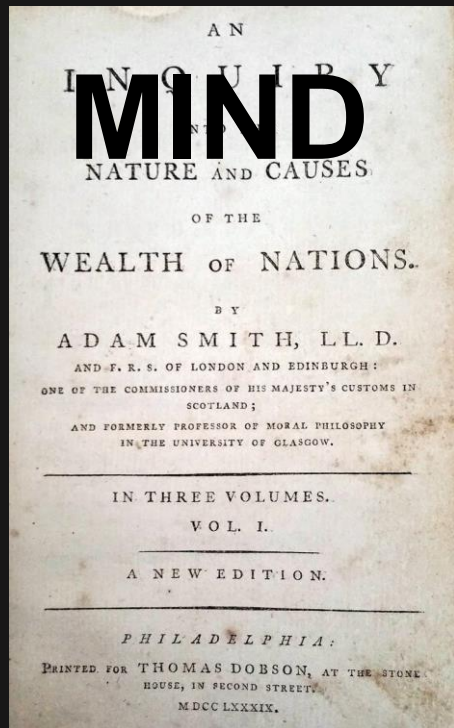


**Adam Smith**  
1723 Kirkcaldy  
1790 Edinburgh



**James Watt**  
1736 Greenock  
1819 Birmingham

# FIRST INDUSTRIAL REVOLUTION





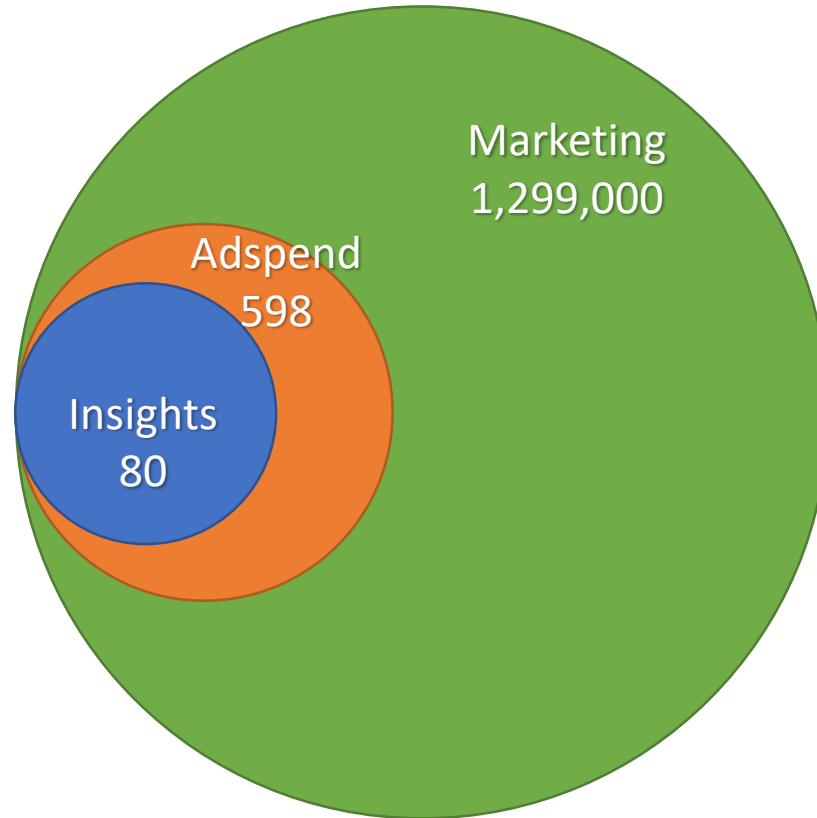
**FOURTH  
INDUSTRIAL  
REVOLUTION**

**HUMAN  
CENTRICITY  
+  
DATA**





# ESOMAR Global Advertising & Marketing Potential



\* Areas have been scaled logarithmically for representation purposes

\*\* This representation compares amounts; it is not a Venn diagram, i.e. Insights is not a subgroup of Adspend

PQ Media's Global Advertising &  
Marketing Revenue Forecast 2018-22.

**ESOMAR**