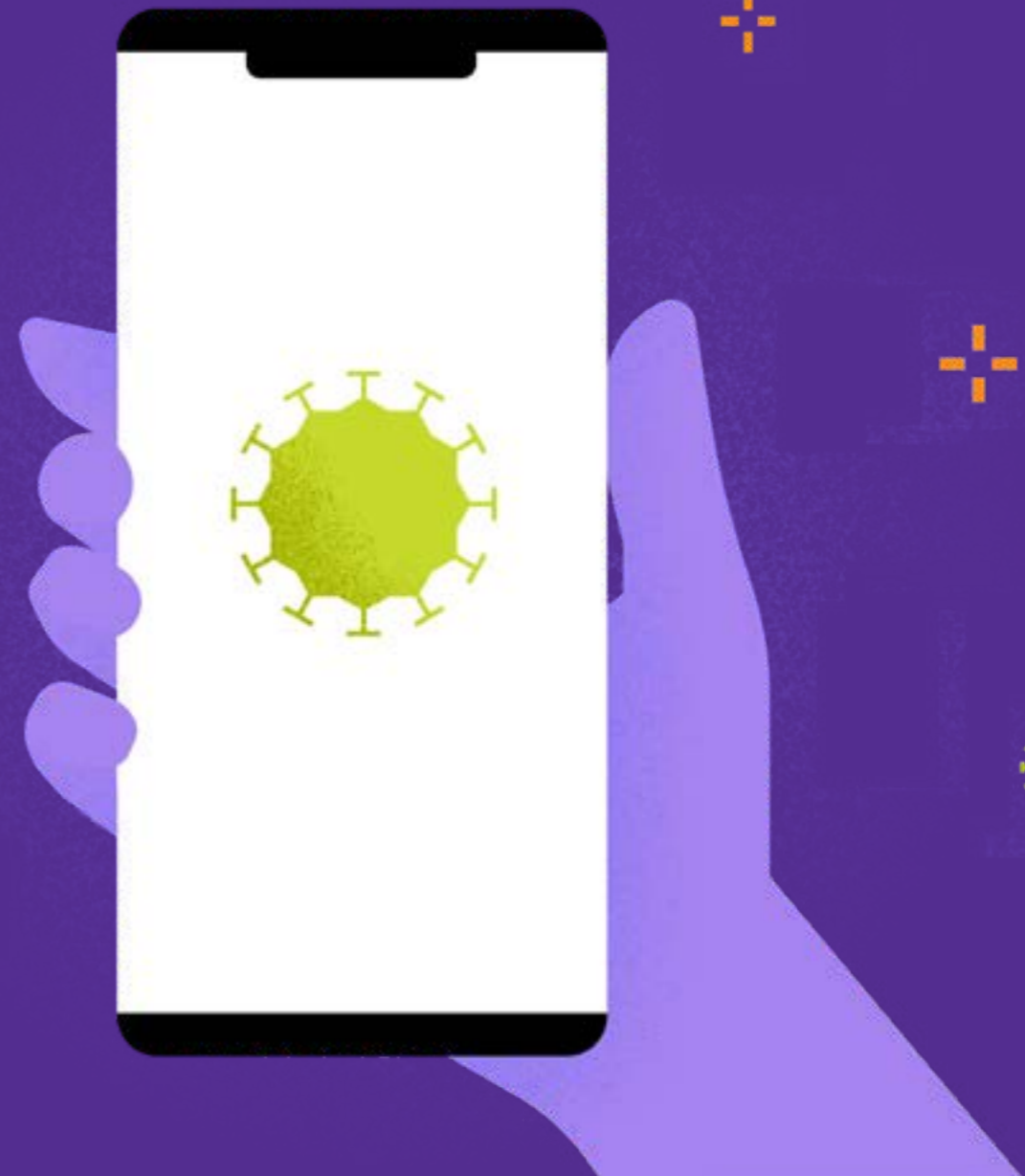


Future of Data

A Snapshot of the
Pandemic in Data:

Survey Insights





What we did

As the first wave of the coronavirus pandemic washed around the world, the Oliver Wyman Forum conducted two multi-nation surveys to gauge people's willingness to share data to contain the virus.

The biggest health crisis of the information age provides a test case of the rapid mobilization of data.

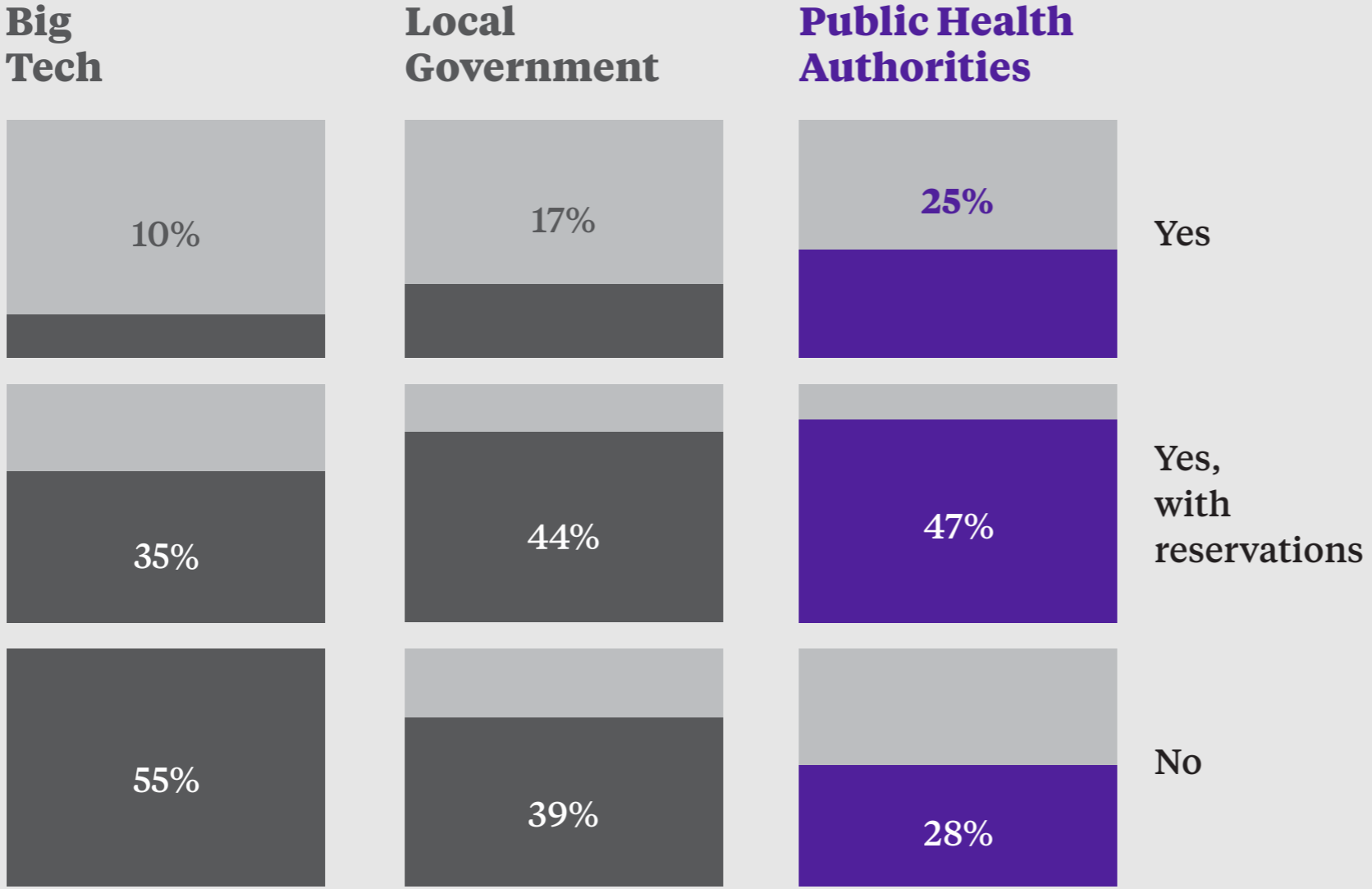
Data analysis has enabled scientists to project the course of the disease, identify the people most at risk, and develop vaccines in record time.

Yet many countries have struggled to contain the pandemic, and lockdowns, masks, and vaccines have become political footballs.



The Circle of Data Trust Is Small

Who would you prefer to share a positive test result with?

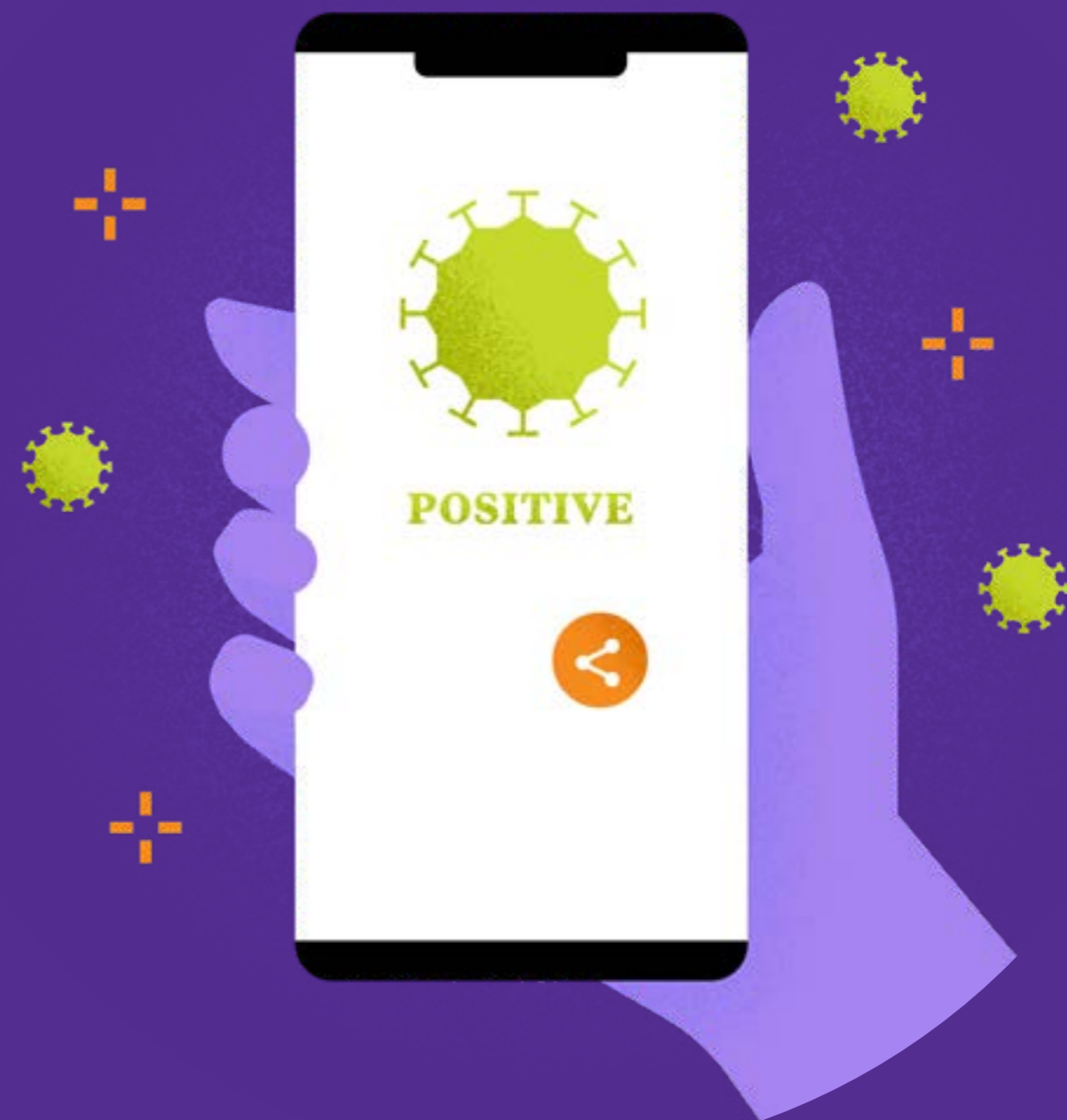


Most respondents were reluctant to share their COVID status with anyone other than their doctor or public health authorities.

Note: March 2020 survey

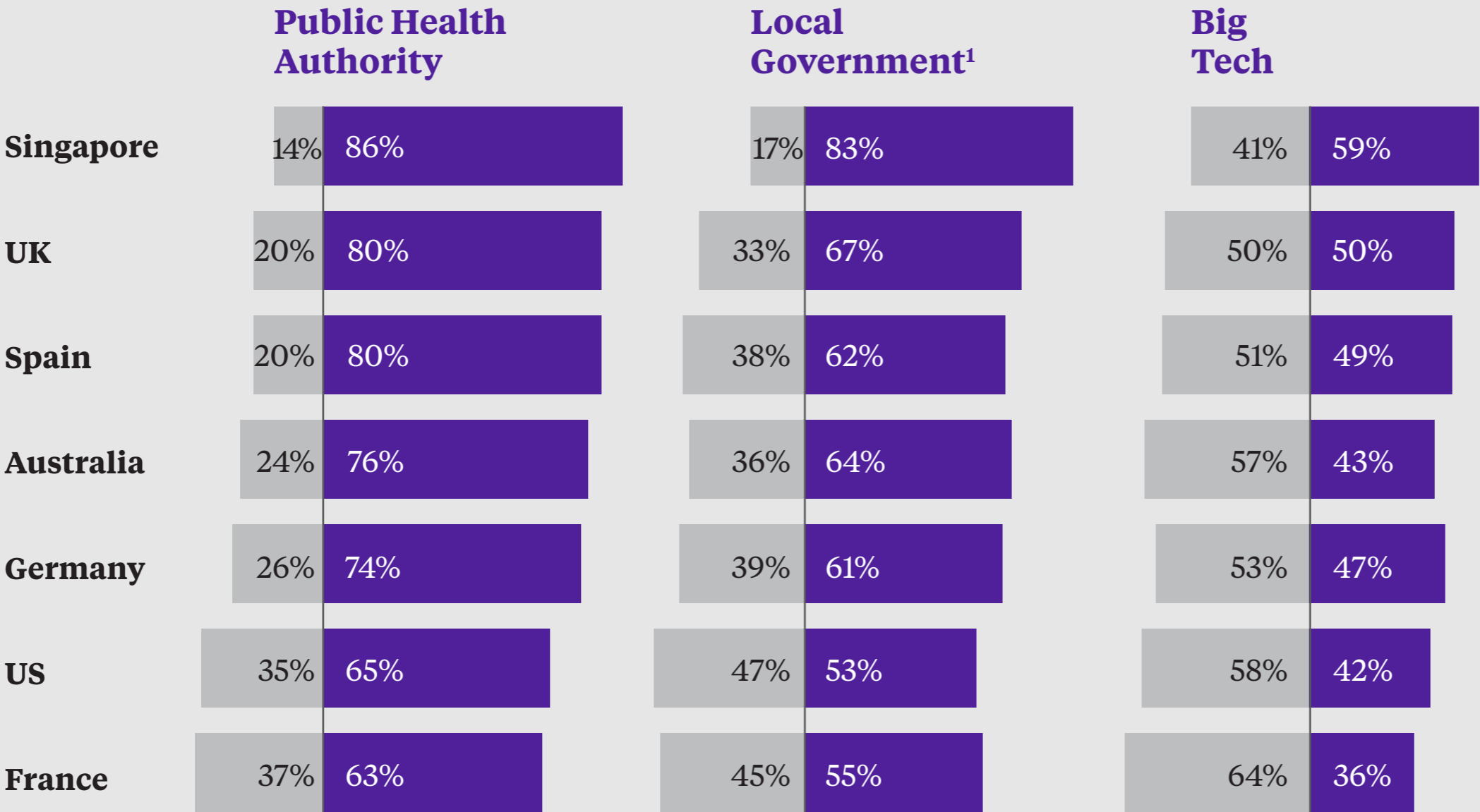
There's an App for That

Data-sharing smartphone apps can help slow the spread of the disease, and reopen economies, by alerting people if they come into contact with infected persons and enabling authorities to conduct contact-tracing.



The Dilemma

Would you download an app to support managing the pandemic if it was developed by

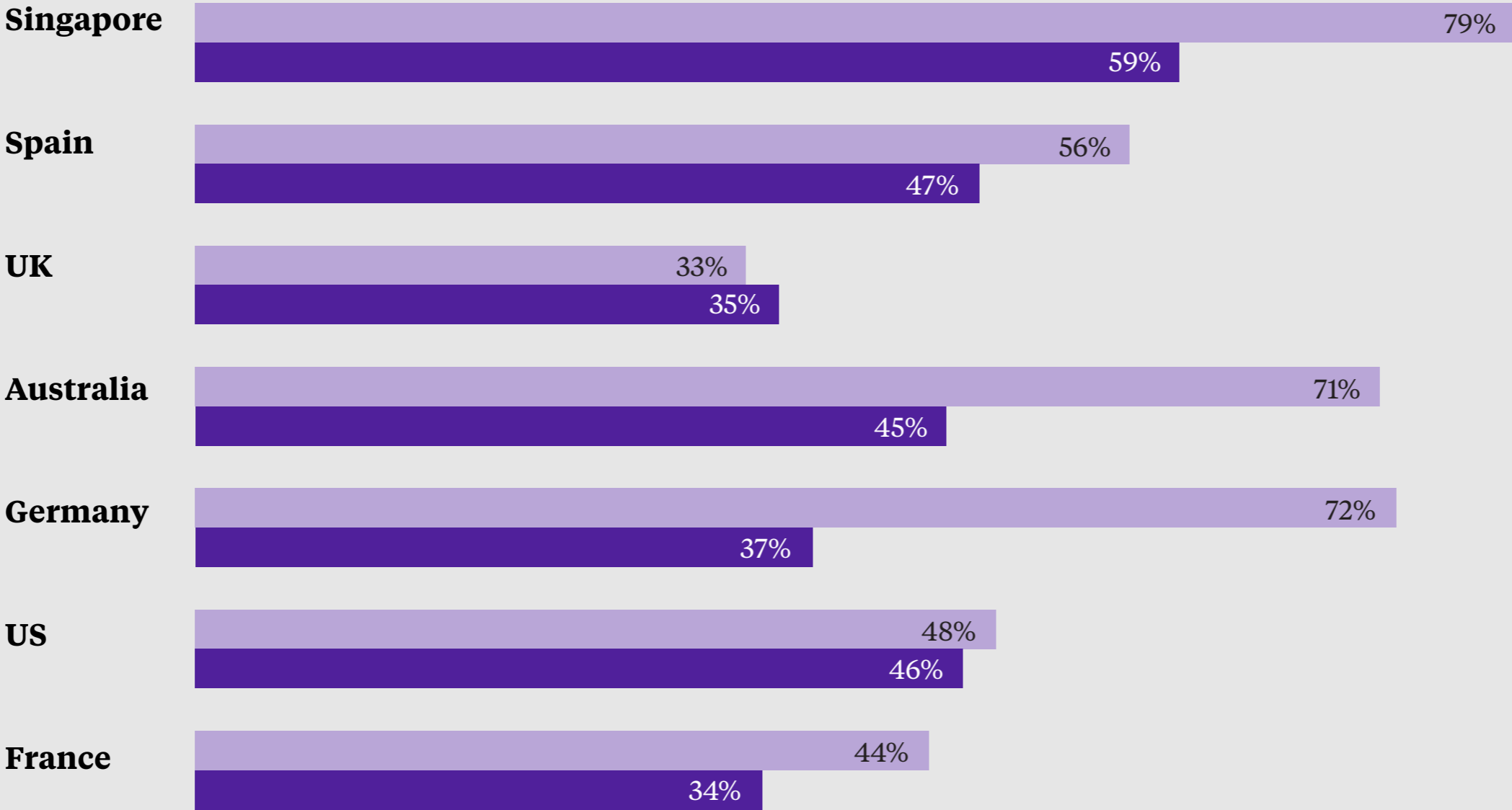


Willigness to download an app depends on who is responsible for it.

■ No ■ Yes

1. Singapore response based on willingness to download an app from the national government.
 Note: June 2020 survey.

Why Are We Using the App



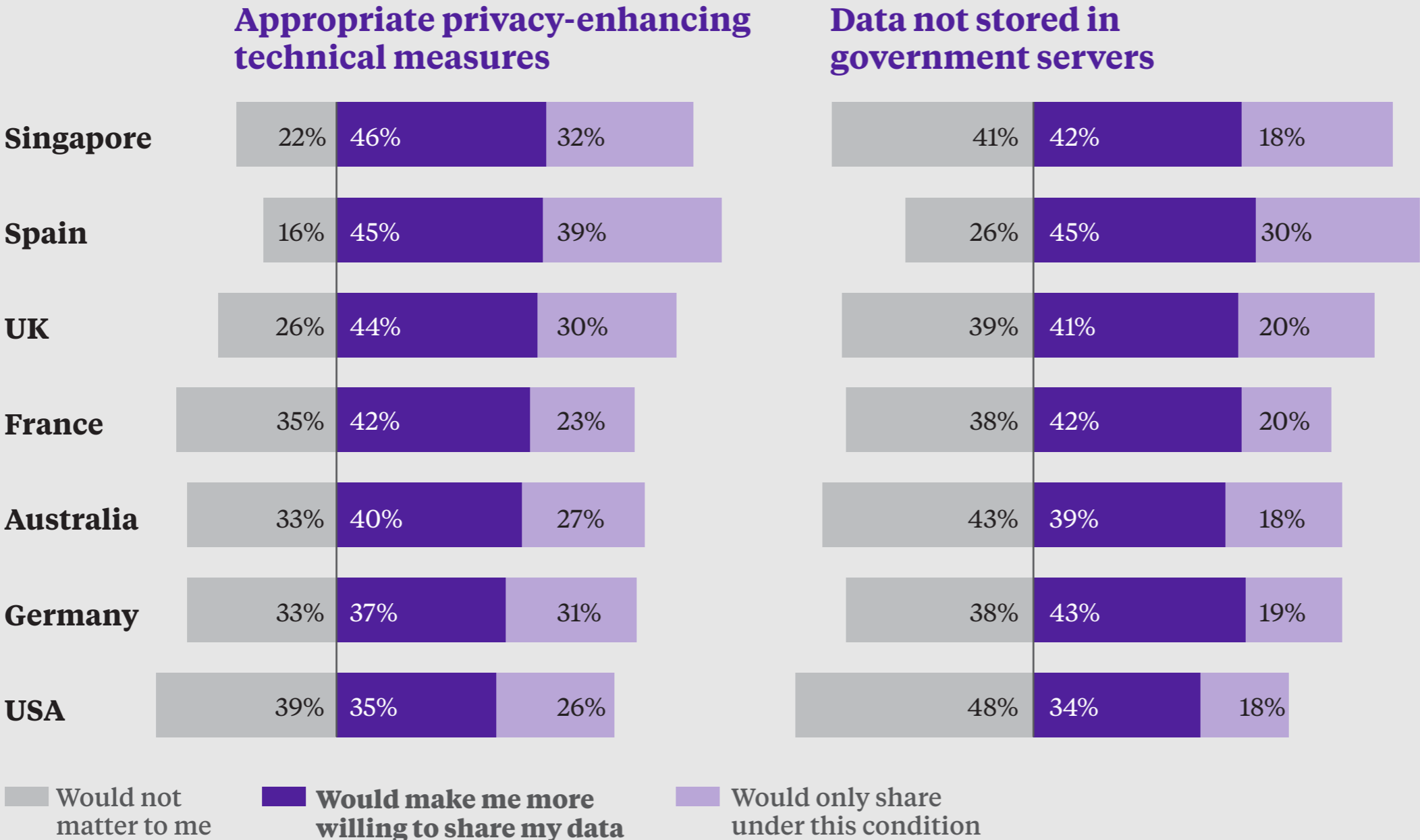
Authorities need to persuade the public that the use of contact-tracing apps is in their own interest.

Awareness of value of contact tracing for public health (% of awareness) **Willingness to download an app that provides notifications of COVID exposure** (% agreeing)

Note: June 2020 survey.

How Will It Be Implemented?

Would you be more willing to share your data with an app to support managing the pandemic if...



Privacy-protection measures have a big role to play in winning over the public.

Note: June 2020 survey.

The Policy Response

Authorities have responded by shifting from contact-tracing apps that centralize data storage to decentralized apps that leave most data on users' smartphones.



Evolution of Contact-tracing Apps

Bluetooth,
Decentralized



DP-3T (EU alternative)
Google/Apple approach
Smittesopp (Norway)

Immuni (Italy)
Corona-Warn (Germany)
COCOA (Japan)
SwissCovid (Switzerland)

Covid Tracker (Ireland)

NHS COVID-19 (UK)

Radar Covid (Spain)

Bluetooth,
Centralized



TraceTogether (Singapore)
HaMagen (Israel)

PEPP-PT (EU)
Aarogya Setu (India)
PeduliLindungi (Indonesia)
Hayat Eve Sigar (Turkey)
MorChana (Thailand)

UK NHSX pilot

StopCovid (France)

CovidSafe (Australia)

GPS,
User Input



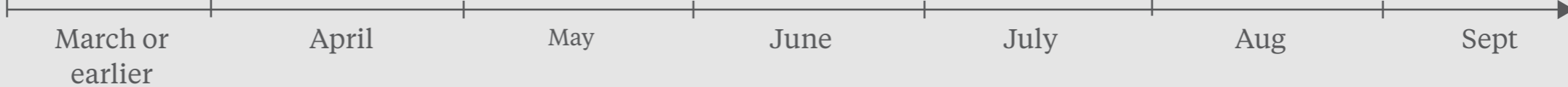
Corona100m (S. Korea)

Rakning C-19 (Iceland)
Norway app

GPS, Facial
Recognition,
User Camera

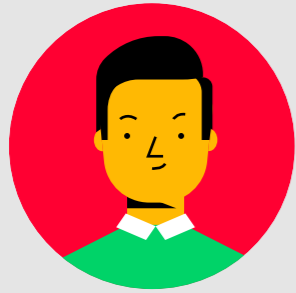


Beijing Health Buddy (China)
AliPay Health Code (China)



Know Your Audience

We identified four attitudinal archetypes by analyzing responses to our survey.



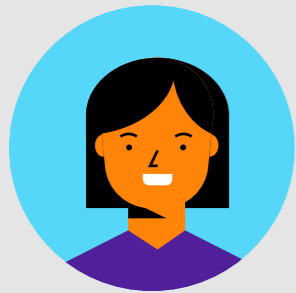
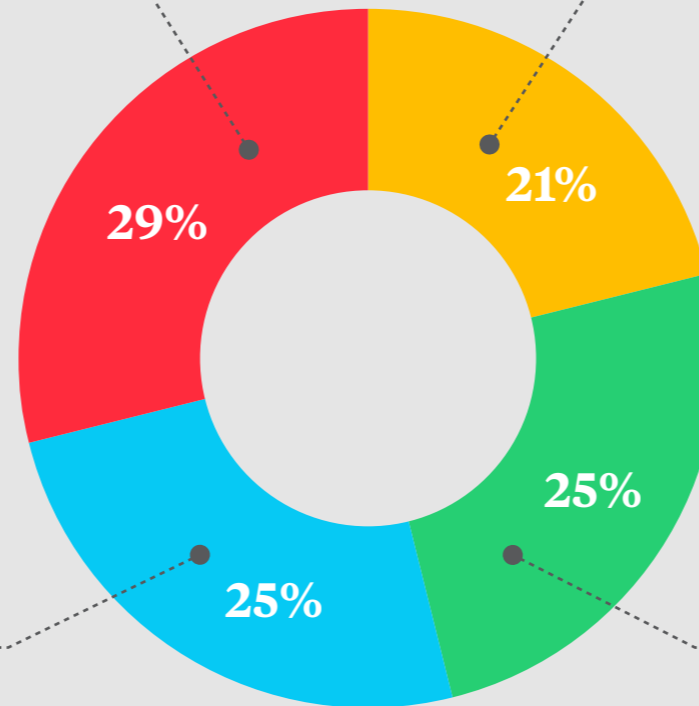
Investor

- Moderate willingness to share data
- More likely to share data when there is some **personal benefit**
- High trust in private firms



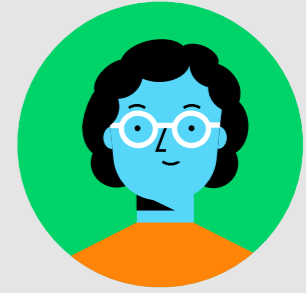
Non-conformist

- Very unwilling to share data, for any reason
- Lower levels of awareness of value of contact tracing and less attuned to pandemic
- **Wants autonomy**



Altruist

- Very willing to share data
- While also placing high value on privacy and protection
- **Motivated by helping others,** among several reasons



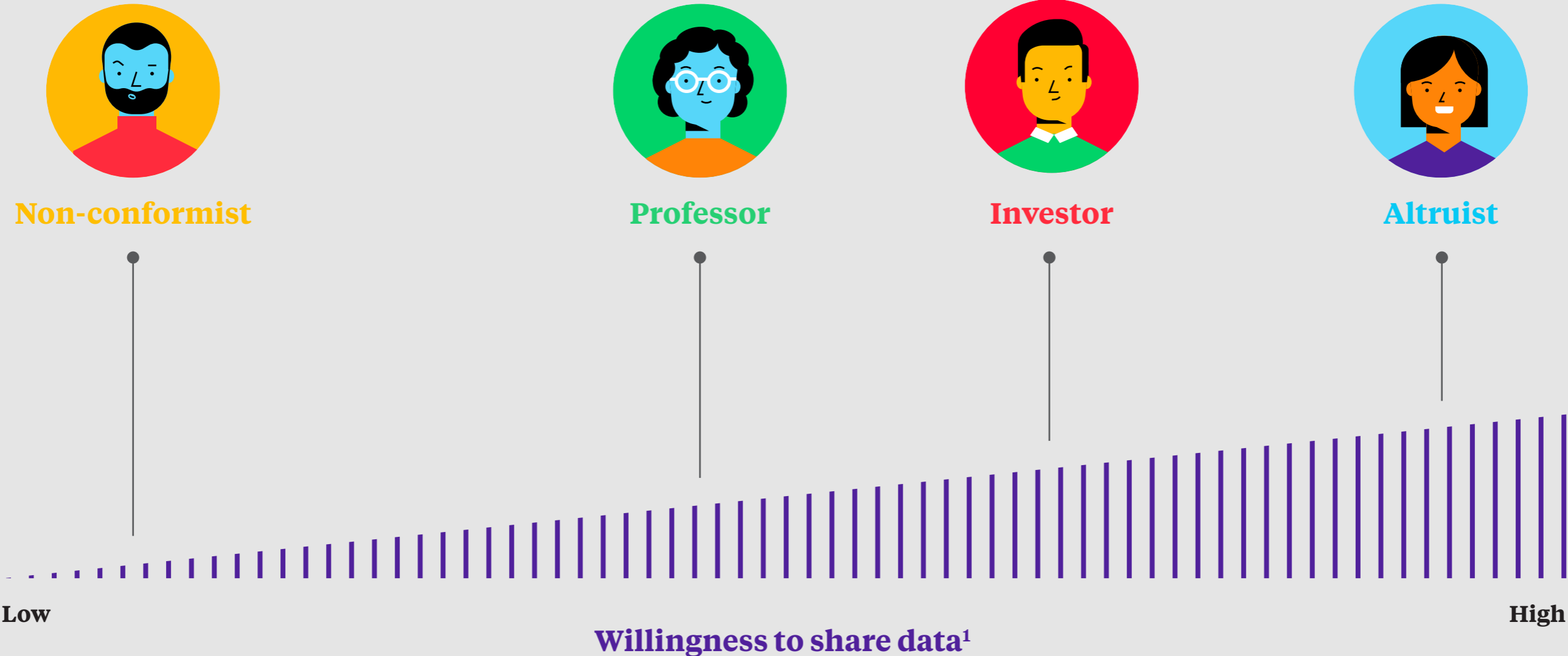
Professor

- Motivated to share data to support pandemic, under right conditions
- Highly concerned about **privacy and security**
- Lower trust in private firms

Note: percentages reflect the share of respondents that fit each archetype.

Attitudes Drive Willingness to Share Data

Governments need to understand people's motivations and concerns about data-sharing and then tailor their message to each group.



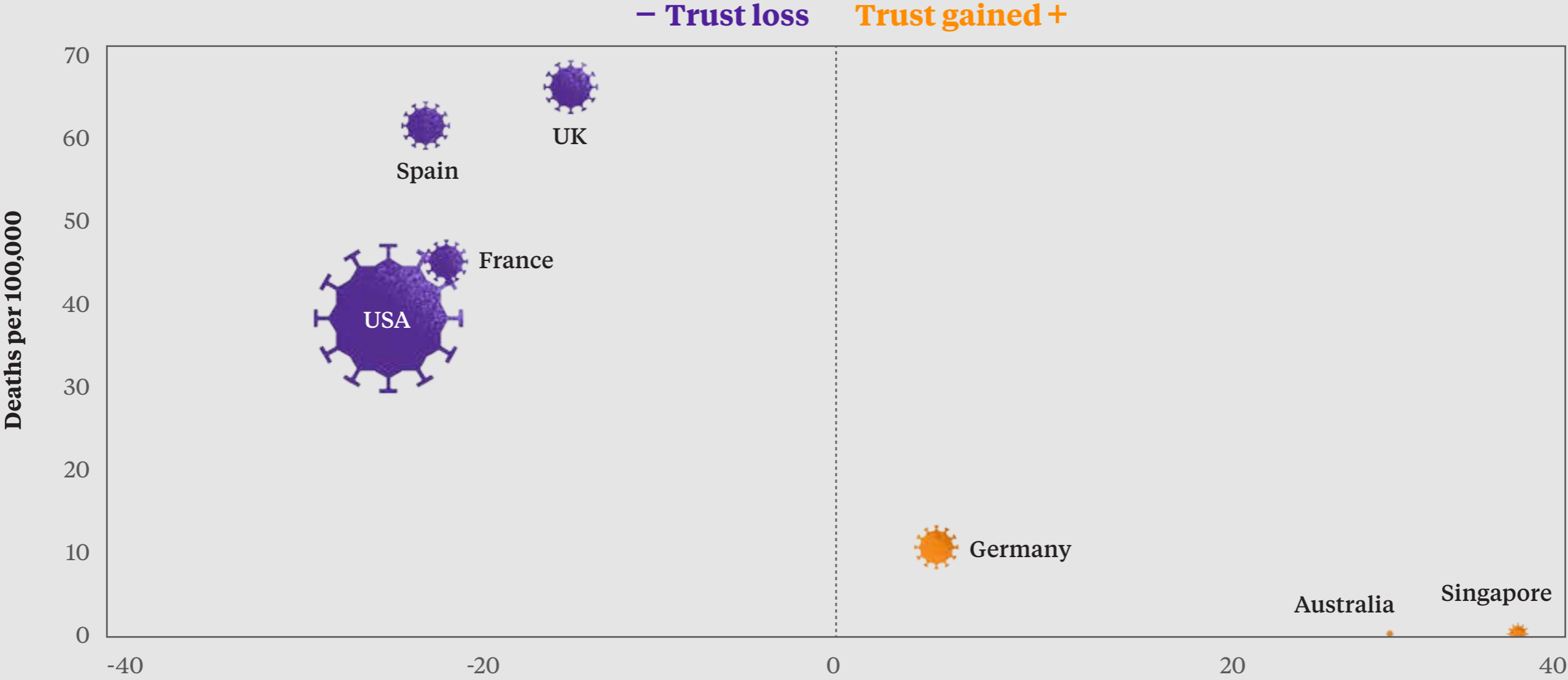
Trust Is The Big Issue

Declining trust in governments makes it harder to fight the virus. But there's hope.





Success and Trust Go Hand in Hand

Governments that have succeeded better in containing the virus tend to enjoy greater public trust.



Change in Trust of National Government, June survey vs. March (in percentage points)

 500,000 confirmed cases  100,000 confirmed cases

Note: Deaths and confirmed cases as of June 2020



The Lessons of 2020

Contact-tracing apps are only one part of an effective pandemic response, but the past year has shown that data has a critical role to play in addressing complex societal challenges. To make full use of it, governments and organizations need to explain what they're doing and why, and show how they will protect people's privacy.



Methodology

Survey 1

March 21–26, 2020

N= 3,600

Survey 2

June 12–22, 2020

N= 5,300

USA

UK

Spain

Germany

France

Australia

Singapore

The survey was produced by Oliver Wyman Forum with coding and sampling provider Dynata, the world's largest first-party data and insights platform.