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ARF Study Finds Slight Decline in Consumer Willingness to Share Data in Past Year

The ARF's second annual privacy study explores shifts in consumer attitudes towards digital privacy, mobile vs. PC usage, and how trust in institutions has changed

New York, NY, August 14, 2019— Consumers are slightly less likely to share their data in 2019 compared to the year prior, according to the ARF's (Advertising Research Foundation) second annual Privacy Study, an annual survey launched as part of an initiative to advance data privacy and protection guidelines for the advertising industry.

Consumers in the U.S. have witnessed a number of public data breaches and scandals in the past 12 months, and are placing more value on their personal data and the importance of keeping their information secure. The ARF privacy study finds that respondents are least likely to share their social security number, financial and medical information, their work address, and their home address and phone numbers.

When asked about their comfort level in sharing their information, the biggest decreases between 2018 and 2019 were seen in respondents' willingness to share their home address (-10 percentage points), spouse's first and last name (-8 percentage points), personal email address (-7 percentage points), and first and last names (-6 percentage points).

Furthermore, offering to customize the consumer experience doesn't dramatically change what data respondents are willing to share. While they understand the perks of personalized advertising, those surveyed do not value personalization highly and do not understand the technical approaches through which it is accomplished.

Additional survey findings include:

- Survey respondents are shifting their usage patterns to mobile from PC. PC use for online activities is falling overall, especially around buying items and researching items to buy (-7 percentage points for both). Of those surveyed, the most common use of PC is for email.
 - Mobile app use is rising, with the most common uses being email (+11 percentage points), social media (+9 percentage points), and gaming (+8 percentage points). Banking and other financial services are also seeing a notable boost, up 8 percentage points from last year.

- Regarding privacy policies, surveyed consumers once again understand the benefit of marketers using their data to target, but don't understand the tools used, such as 'pixel tags.' There is a general mixed understanding around terms such as 'local storage,' 'server logs,' 'first party data,' and 'third party data.' Interestingly, when the data is broken out by membership in ethnic categories, Hispanics have a higher level of comprehension of the terms typically used in privacy statements compared to other ethnic groups.
- There has been little change in the institutions people trust, at least across the total population. Consumers continue to trust people like themselves, local police, scientists, and experts. Respondents also continue to mistrust media, Congress, and advertising. However, there are some significant differences in demographics. For example:
 - Those with less than a high school education trust scientists and experts the least.
 - Democrats and Asian Americans have increased their trust in Congress (+10%) in contrast to Republicans, whose trust in Congress has declined by a similar amount.
 - Democrats and Asian Americans also have the greatest trust in the media and television news.
 - Baby Boomers, Republicans, and Whites are most likely to trust their local police.

“The implications of these findings are critical in light of the California Consumer Protection Act (CCPA) soon going into effect, which will allow consumers to opt-out of the sale of their personal information to third parties, not to mention the other upcoming state and federal regulations that could impact the ad tech industry,” said Paul Donato, Chief Research Officer at the ARF.

“It is also worth exploring in more detail, why the American people do not see the value in sharing data to improve personalization of advertising messages. In spite of that, more relevant advertising is one of the few reasons the public would consent to share their data,” added Donato.

Study Methodology:

The ARF surveyed 1,105 adults 18+, balanced by age, gender and region, in order to understand how well consumers understood common privacy terms, what personal data they were willing to share and how their attitude changed when offered the benefit of greater customization of their on-line experience, since the ARF last conducted similar research. The survey also delved into who and what consumers trust and if that varied by any core demographic group. The survey was fielded from during the week of March 26, 2019, in a mobile-device friendly on-line survey powered by Qualtrics.

About the Advertising Research Foundation

Founded more than 80 years ago, the ARF is dedicated to creating, curating, and sharing objective, industry-level advertising research to enable members to make a true impact on their advertising and build marketing leadership within their organizations. It has 400 members from leading brand advertisers, agencies, research firms, and media-tech companies. For more information, please visit www.thearf.org.

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