

US DATA PRIVACY: WHAT THE CONSUMER REALLY THINKS 2022

Research partner



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INTRODUCTION

On behalf of the entire Global Data and Marketing Alliance (GDMA), which represents and unites 27 data-driven marketing associations from around the globe, welcome to the second '*US data privacy: What the consumer really thinks*' US in-depth report.

This in-depth look at the US market is part of a global study that was first undertaken in 2018 covering 10 countries on four continents (Argentina, Australia, Canada, France, Germany, the Netherlands, Singapore, Spain, the UK and the USA). This 2022 edition has been expanded to 16 countries representing over half the world population with the addition of Belgium, Brazil, China, India, Japan and Mexico.

In addition to the Global report the project includes in-depth reports for the US, UK and German markets. This research has been made possible with the continued support of Acxiom and our research partner Foresight Factory.

Data-driven advertising is essential to the world's leading brands, our modern online marketplace, and the global economy. Through responsible and intelligent data use, businesses and nonprofits can more effectively build relationships with customers and donors to drive growth while consumers benefit because the offers they receive will be more timely and relevant.

At the heart of this relationship is trust. 39% of US consumers place trust in an organization in the top three factors that make them happy to share their personal information. This is consistent with our global findings with 37% overall across the world agreeing.

There is no doubt that marketers must behave responsibly in order to build customer relationships and maintain trust and earn long term brand loyalty. A trusted commercial ecosystem must be based on a transparent exchange of value between your business looking to prosper and your customers receiving benefit.

I hope that you will take the time to look carefully at the research and use it to develop your own approach to your customers. It is only by being truly customer focussed that your business can prosperously grow to be enjoyed, prized and ultimately sustained by your market.

Martin Nitsche
GDMA Chair

FOREWORD

The digital revolution has dramatically enhanced people's ability to enjoy everyday life, improving everything from healthcare, science, and humanitarian work to purchasing things like travel, shoes, and dinner. Those who work with data every day know it is data that makes much of life today possible. When vaccines are developed in record time to tackle a global pandemic? That's thanks to data.

And while our world is changing, so too is legislation. Since the last iteration of this report in 2018, we've seen key state legislation come to fruition such as the California Consumer Privacy Act, the Virginia Consumer Data Protection Act, and the Colorado Privacy Act. These are positive steps toward greater control and accountability – but it's Acxiom's belief that what's really needed is a holistic, nation-wide approach.

It is against this backdrop that the 2022 survey results should be seen.

With so much talk about data privacy, data use, and data control in the public discourse, consumers are increasingly aware of data and its role in our society, with 79% of American consumers open to engaging in the data economy. Perhaps this is in part due to people's increasing understanding of data and the work brands have done to increase transparency. It also seems clear the increasing generations of people who have grown up with data are having an effect as well, but the AdTech industry must continue to find an answer to this long-standing message: people still don't see themselves benefiting from data as much as companies do.

When we take a step back, we remember the fundamental purpose of advertising is to connect brands with people and people with brands in meaningful, valuable ways that create trust. Since we know regulation is always trying to catch up with innovation, there's plenty brands can do to earn trust now. Essential to creating trust is communicating the value exchange between brands and people – in other words, it is brands' responsibility to help people understand what they receive in return for sharing their data. As marketers, we must continue to make that value clear, whether it's in more straightforward scenarios like relevant discounts and offers or the more complex nuances of seamless personalized experiences that surprise and delight.

One fundamental component of the value exchange is transparency. Transparency requires a level of understanding, and often use cases are complex or difficult to explain, especially when consumers simply want to get on with their daily digital lives with minimal interruption. We expect the use of layered privacy notices (i.e., a short notice with key terms and a longer notice with more description) to remain a key tool for the foreseeable future as we all strive for openness and understanding in a complicated ecosystem with many players. We strongly believe that people should reasonably expect their data to be used for the purposes set out in a well-crafted privacy notice.

In summary, our position as an industry needs to align with that of the regulators – transparency is not only a key ingredient to the ethical use of data, ensuring the use is legal and fair, but it is also good business for brands and imperative for people. Transparency breeds data trust.

For more than 50 years, Acxiom has believed in, invested in, and advocated for ethical data use that delivers growth for businesses our economies, and most importantly delivers value for people. Acxiom is proud to once again partner with the GDMA (of which the ANA in the US is a member) and our independent research partner, Foresight Factory, and we thank them for making this important work possible.

Jordan Abbott
Chief Privacy Officer

EXECUTIVE SUMMARY

The majority of American consumers remain Data Pragmatists

In 2022, almost half (48%) of US consumers are Data Pragmatists; people who are happy to exchange data with businesses so long as there is a clear benefit for doing so. Just over 1 in 3 (31%) of US consumers are Data Unconcerned; people who show little or no concern about their data privacy. Less than 1 in 4 (21%) fall into the Data Fundamentalists segment; people who are unwilling to share personal information. Consequently, in 2022, the vast majority of American consumers (79%) are open to engaging with the data economy.

And the Data Unconcerned are in the ascendency

Since 2018, there has been an increase in the proportional size of the Data Unconcerned vs. the other segments. The Data Unconcerned have increased from 18% of the US population in 2018 to 31% in 2022. At the same time, the Data Pragmatists have declined from just over 8% in 2018 to 48% in 2022 and the Data Fundamentalists have also decreased from 24% in 2018 to 21% in 2022. Therefore, while the Data Pragmatists remain the most prevalent segment, there is a clear trend in the US toward the growth of the Data Unconcerned over the previous 4 years.

Online privacy concerns remain high, but are in notable decline since 2018

There has been a clear decline in the proportion of US consumers who claim to be concerned about the issue of online privacy. In 2018, 82% of US consumers claimed to be concerned about their online privacy. However, this has fallen to 69% in 2022.

American consumers are increasingly comfortable with data sharing and the amount of information shared

Growing numbers of US consumers claim they feel more comfortable with the notion of exchanging personal information with companies, with 51% agreeing with this statement in 2022 compared to 44% in 2018. Moreover, the proportion of American consumers who claim to be happy with the amount of personal information they give to organizations has also risen, from 51% in 2018 to 54% in 2022.

Growing public awareness of the role of data sharing for the running of modern societies

The number of American consumers who view the exchange of personal information as essential for the smooth running of modern society has increased over the previous 4 years, rising from 41% in 2018 to 48% in 2022.

A consumer capitalist mindset has continued to advance in the US

In 2022, a majority of US consumers view their personal data as an asset that they can utilize to negotiate better prices and offers from brands. Over 1 in 2 (55%) Americans now hold this view compared to 48% in 2018. What's more, agreement increases further among certain ages groups, reaching 69% among those aged 35-44 and remaining above 50% for all age groups under 65.

Industry is still seen to benefit most from the data economy, but less so than in 2018

Just over 6 in 10 (61%) of US consumers believe that businesses benefit most from data exchange. However, this is down notably from 75% in 2018. At the same time, more Americans now believe that they themselves benefit most from data exchange, with 15% now holding this view compared to 11% in 2018.

US consumers say they have increased control over data sharing, but would like even more

The proportion of US consumers who believe they have no control over aspects of their personal information and data exchange with brands has declined since 2018. In 2022, 39% of consumers in the US believe that they have no control in ensuring that brands use their data for the purpose they had initially agreed to, down from 50% in 2018. Despite this, the vast majority (79%) of Americans still seek more control over the information they share with companies.

Building trust remains paramount, despite a decline in relative importance since 2018

Trust in an organization remains the most important factor driving consumer willingness to share personal information with a company in the US. While it has declined in importance since 2018, trust remains the top influencer in facilitating data sharing. In 2022, nearly 4 in 10 US consumers (39%) place trust in an organization in the top three factors that make them happy to share their personal information with a company, down from 55% in 2018.

US consumers continue to seek transparency as a precursor to data sharing

Transparency remains an important factor for American consumers when it comes to sharing personal information with a brand or organization. However, its relative importance has declined since 2018. In 2022, 2 in 3 (67%) consumers state that transparency about how their data is collected and used is important to them when sharing their personal information, down from 84% in 2018. Moreover, 2 in 3 believe that having terms and conditions that are easy to understand is important, but this has also declined from 84% in 2018.

An array of incentivization strategies exist to engage the US consumer

The American consumer continues to show an interest in a wide spectrum of rewards and benefits to entice engagement with data exchange. However, benefits linked to clear direct financial rewards have decreased in influence compared to others. For example, the number of consumers who claim they would be likely to exchange personal data in return for a direct financial reward or free products/services has fallen, while incentives linked to the personalization of product, service and brand recommendations have all increased. Such findings highlight that US consumers are becoming more open to service-led incentives that offer forms of personal enhancement alongside more direct financial rewards.

US consumers show high levels of responsibility for their own data security, but also have growing expectations of industry and government

US consumers remain most likely to claim that they themselves have ultimate responsibility for their own data security, with 44% holding this view in 2022 compared to 43% in 2018. However, there has been a notable growth in the proportion of consumers in the US who claim that industry and government should have primary responsibility. Those selecting industry has increased from 7% in 2018 to 12% in 2022, while the proportion selecting government has risen from 6% to 10% over the same period.

US public awareness of data security regulations remains broadly unchanged

In 2022, 52% of American consumers state that they are aware of the data protection regulations in their country, down slightly from 54% in 2018. However, changes in awareness in data protection regulations varies considerably by age. Indeed, among Americans aged 35-54, awareness has increased, while for all other age cohorts there has been a decline in awareness.

Growing interest in B2B data sharing for service and product enhancements

US consumers are increasingly happy for businesses to share their personal information with other organizations in order to deliver more personalized services and products. Agreement with this notion has risen from 30% in 2018 to 44% in 2022.

The majority of US consumers believe data sharing can help industry respond better to the needs of all parts of a diverse society

The majority (58%) of American consumers agree that the sharing of personal information helps ensure that organizations can better meet the needs of a diverse society, by improving their understanding of the attitudes and wants of a wider range of groups and identities. Agreement with this sentiment reaches almost 3 in 4 (73%) among those aged 35-44.

Younger consumers show a particularly strong willingness to share personal data to drive the competitiveness of smaller businesses

The role that data sharing can play in driving more competitive economies is a compelling reason for many US consumers to share personal information, with over 1 in 3 US consumers (43%) stating that they would be more likely to exchange personal data to provide a competitive advantage to smaller companies. Agreement levels increase to over 1 in 2 among those aged 25-44.

PART 1: THE CHANGING USA CONSUMER LANDSCAPE

The findings presented in part 1 of this report indicate that the mature and empowered consumer mindset toward online privacy and data exchange, first identified in 2018, has continued to develop across US society over the previous decade. Overall concern with data privacy is in decline, while the levels of happiness with the amount of data shared and comfort with the notion of data exchange are on the rise. In addition, public awareness and understanding of the role that data exchange plays in the running of modern societies has increased over the previous 4 years.

A pragmatic view toward data exchange remains the most prominent in the US, and the unconcerned mindset is in the ascendency

In 2012, the UK DMA and Foresight Factory constructed a segmentation analysis that categorized consumers according to their attitudes toward privacy and data exchange. The key segments adopted were:

- **Data Pragmatists:** those who are concerned about online privacy but will make trade-offs on a case-by-case basis as to whether the service or enhancement of service offered is worth the information requested
- **Data Unconcerned:** those who are unconcerned about online privacy in general and characterized by lower levels of concern about the sharing of personal data
- **Data Fundamentalists:** those who are concerned about online privacy and are unwilling to provide personal information even in return for service enhancement

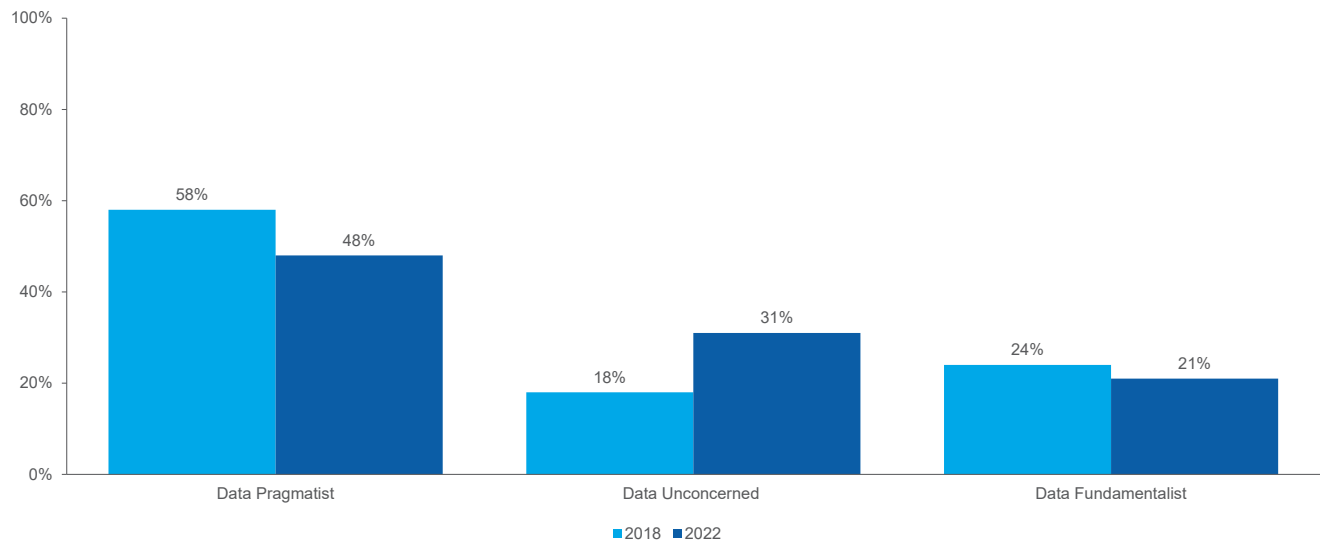
This same segmentation was developed for the US population in 2018. For the purposes of this report, we have re-created the same segmentation to explore how macro attitudes toward privacy and data exchange have evolved. In 2022, we find that:

- **Data Pragmatists:** 48% of the US population (down from 58% in 2018)
- **Data Unconcerned:** 31% of the US population (up from 18% in 2018)
- **Data Fundamentalists:** 21% of the US population (down from 24% in 2018)

While the Data Pragmatists remain the largest segment in the US, the major trend over the preceding decade has been the growth of the Data Unconcerned. Indeed, the proportion of the Data Unconcerned has increased significantly, rising from 18% in 2018 to 31% in 2022. At the same time, the Data Pragmatist segment has declined from 58% in 2018 to 48% in 2022. The trajectory of the Data Fundamentalists segment has followed the same direction, declining from 24% in 2018 to 21% in 2022.

These findings indicate that attitudes toward online privacy and data exchange in the US are following a consistent trend toward a consumer landscape that is less concerned about data privacy and more open to engaging with the data ecosystem. In 2022, it is now a high majority of US consumers (79%) who show no fundamental objection to engaging with the data sharing ecosystem.

A segmentation of attitudes toward privacy in the US



The growing prominence of the Data Unconcerned is partly explained by the high number of 18-24s who fall into this segment: 50% compared to a total average of 31%. As most of this age group were not part of the adult population in the 2018 research, this goes some way to explaining the notable shift toward the Data Unconcerned in recent years. Older age groups, however, are less likely to fall within this segment. For example, just 17% of consumers aged 65+ are Data Unconcerned.

Alongside the growing proportion of the Data Unconcerned, there remains a notable minority of US consumers who are unwilling to share personal information, even in return for a personal benefit. In 2022, just over 1 in 5 (21%) US consumers hold this view and fall within the Data Fundamentalist segment. Unlike the Data Unconcerned, it is older age groups who are most likely to comprise this segment. Indeed, 4 in 10 of those aged 65+ are Data Fundamentalists compared to less than 1 in 10 of those aged 25-44.

A segmentation of attitudes toward privacy in 2022, by age

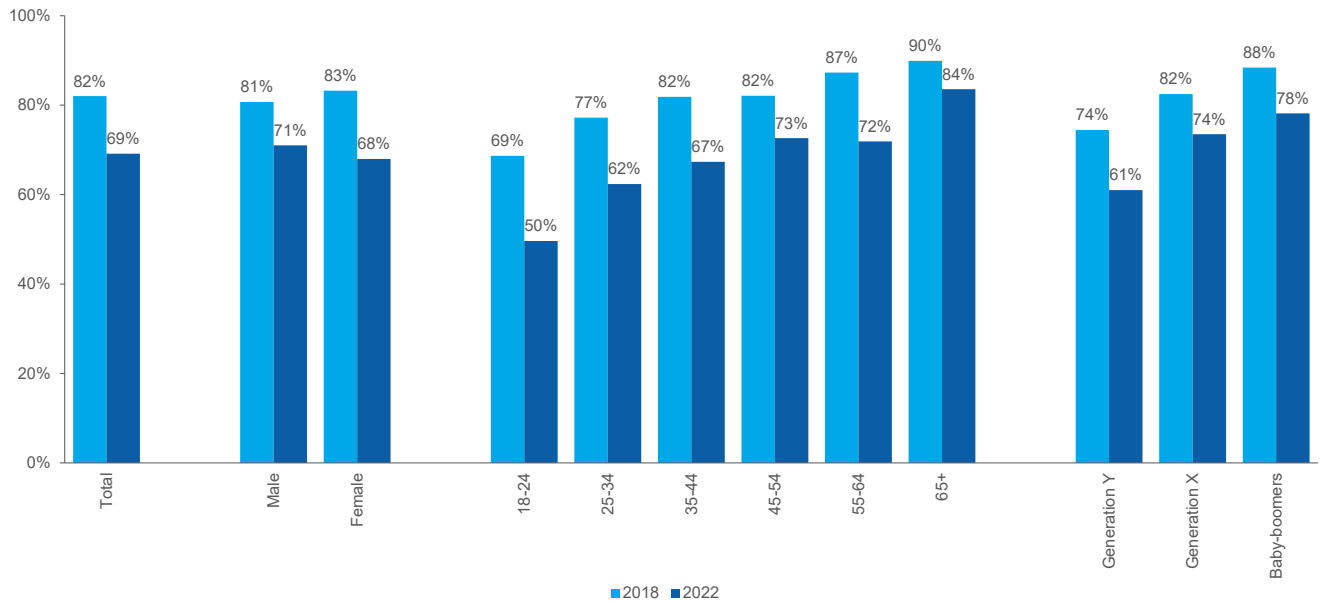
	Data Pragmatists	Data Unconcerned	Data Fundamentalists
18 – 24	36%	50%	14%
25 – 34	53%	38%	9%
35 – 44	59%	33%	8%
45 – 54	53%	27%	19%
55 – 64	42%	28%	30%
65+	44%	17%	41%

The largest segment in the US continues to be the Data Pragmatists, indicating that a mindset characterized by a level of privacy concern but with a clear willingness to engage in data exchange for a perceived personal benefit remains the most prevalent across the US consumer landscape. Interestingly, the youngest and older age groups are the least likely to fall within this segment, while higher numbers (over 1 in 2) of those aged 25-54 are Data Pragmatists in 2022.

Clear decline in levels of public concern about the issue of online privacy

Since 2018 there has been a notable decline in the proportion of US consumers who claim to be concerned about the issue of online privacy. In 2018, 82% of US consumers claimed to have relatively high concerns about online privacy, but this has fallen to 69% in 2022. However, concern is higher among older age groups, reaching 84% of the 65+ cohort in 2022.

“On a scale from 1 to 10 where 1 is ‘not at all concerned’ and 10 is ‘very concerned’, how do you rate your levels of concern about the issue of online privacy these days?”
% who answer 7-10



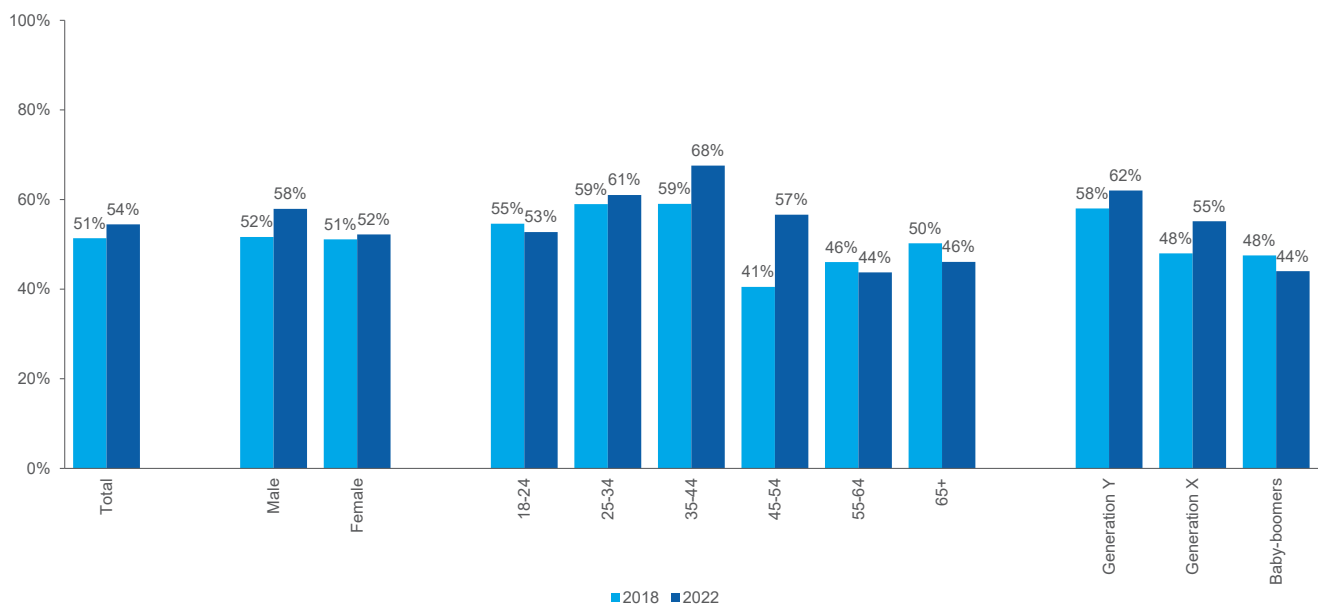
Despite this, online privacy concern has fallen across all age groups. Indeed, the decline among younger age groups is particularly significant. For example, 1 in 2 consumers aged 18-24 in the US are concerned about online privacy, compared to 69% in 2018.

Growing levels of happiness and comfort with data sharing

Alongside declining levels of concern about online privacy, US consumers also indicate increased levels of happiness with the amount of personal information they share and higher levels of comfort with the notion of data exchange.

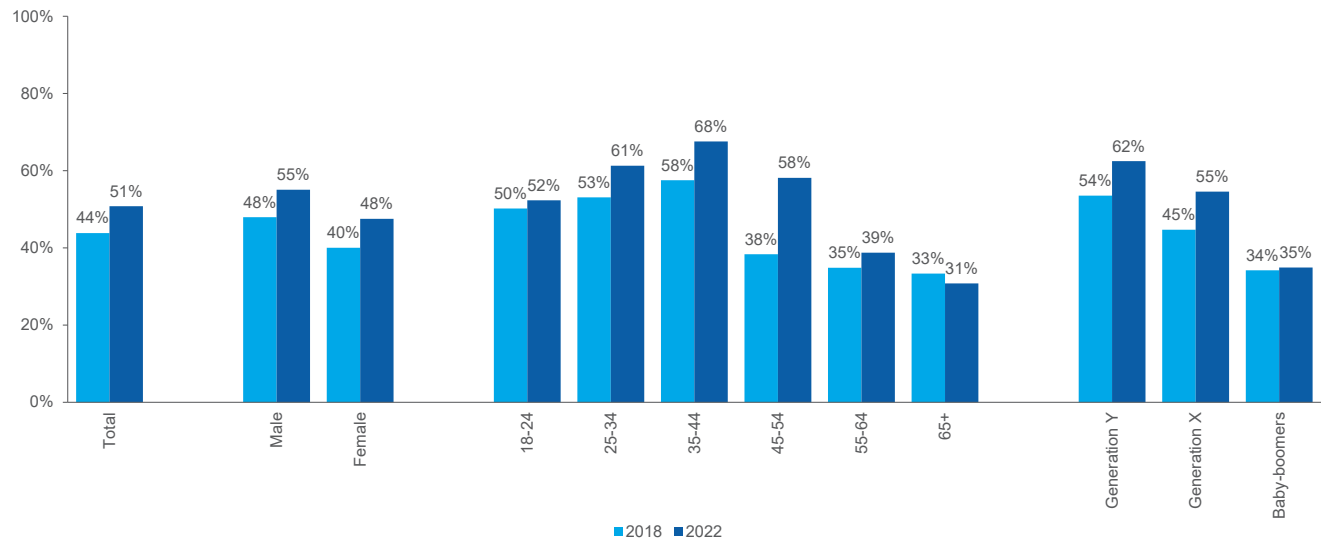
The proportion of US consumers who claim that, on the whole, they are happy with the amount of personal data they share with organizations has risen from 51% in 2018 to 54% in 2022. Interestingly, levels of happiness with the amount of data shared is particularly high among those aged 35-44, where agreement reaches 68%.

“On the whole I am happy with the amount of personal information I give to organizations these days” | % who strongly agree or agree



US consumers are also displaying higher levels of comfort with the notion of exchanging personal data with companies, with 51% claiming to feel more comfortable in 2022 compared to 44% in 2018. Again, agreement reaches a high of 68% among the 35-44s.

“I feel more comfortable with the idea of exchanging some personal data with companies than I did previously” | % who strongly agree or agree

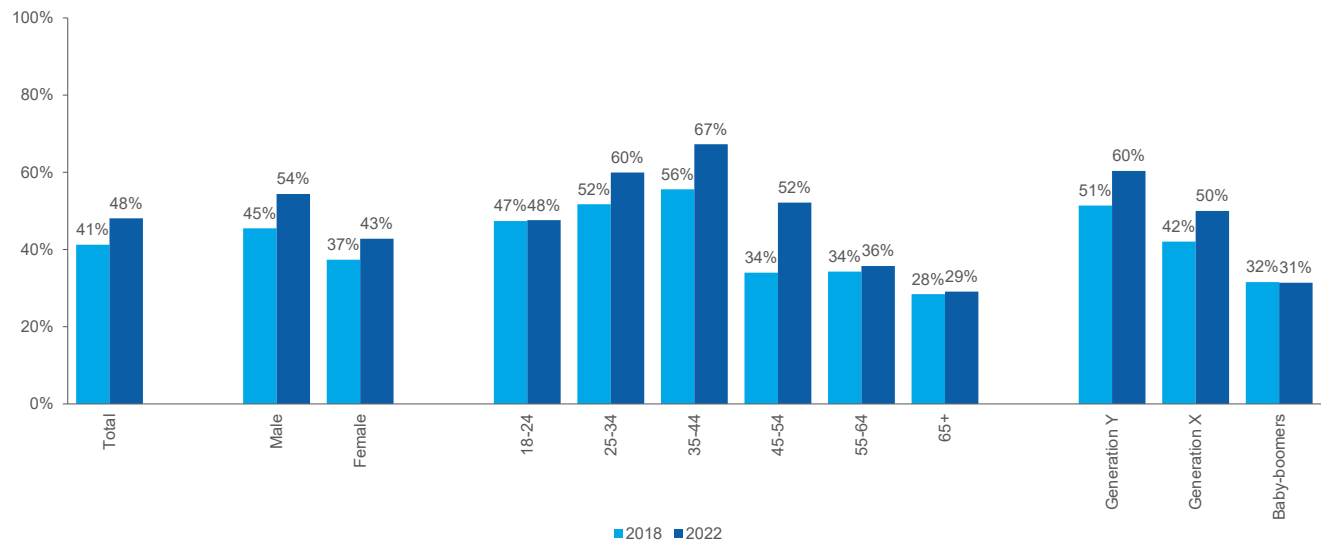


It should be noted that older age groups are less likely to claim growing levels of happiness and comfort with data exchange. While a clear majority of those aged 18-54 claim to have increased happiness and comfort levels, this falls to a minority of those aged 55+. In fact, just 1 in 3 of those aged 65+ in the US claim that they are more comfortable with the idea of data exchange. Furthermore, there is also a gender divide, with US men showing higher levels of happiness and comfort with data exchange compared to US women.

Growing awareness of the role of data sharing for the running of modern societies

The US consumer is also becoming more aware of the role that data sharing plays in modern societies. In 2022, 48% agree that the exchange of personal information is essential for the smooth running of modern society, up from 41% in 2018. What's more, agreement levels increase to 60% among those aged 25-34 and to 67% among the 35-44s. However, older age groups and US women are less likely to view data exchange as important for the running of modern societies.

“The exchange of personal information is essential for the smooth running of modern society” | % who strongly agree or agree



Taken together, such findings point toward an increasingly comfortable, knowledgeable and empowered US consumer, providing fertile ground for the continued growth of the data economy in the 2020s. To capitalize on the positive trends outlined above and to expand wider consumer confidence and engagement with data exchange across the US consumer landscape, increased focus will need to be placed on the factors that drive healthy and sustained engagement with the data ecosystem. Indeed, such a focus will be needed to overcome the notable polarization of engagement with data exchange across age groups and, albeit to a lesser extent, gender in the US. It is these factors that will be explored in part 2 of this report.

PART 2: PROMOTING A HEALTHY US DATA ECONOMY

Since 2018, US consumers demonstrate growing awareness and understanding of the intrinsic value of their data and have developed increased entrepreneurial mindsets toward data sharing.

However, challenges to the perceived value exchange that were first identified in 2018, remain. The majority of US consumers continue to claim that industry benefits most from data exchange. Moreover, a high majority also expect to receive continuously enhanced levels of service without the need to share more personal information. While there is also evidence of a growing appreciation of the value offered to consumers themselves via data exchange since 2018, such findings point to the risk of an emerging disconnect between consumers and industry over the role that data sharing will play in fueling innovation and improvements in future levels of customer experience and service offered in the 2020s.

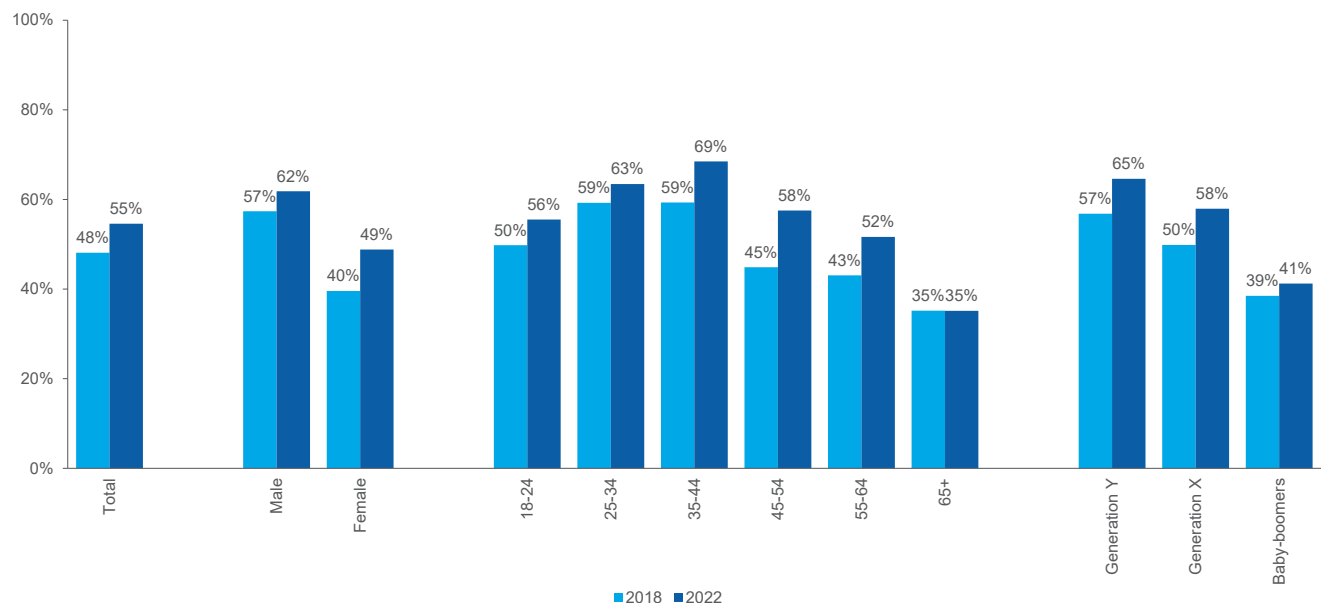
In order to develop an optimized data ecosystem, trust, control and transparency remain the foundational factors that encourage US consumers to engage in data sharing. What's more, American consumers continued to identify a range of incentives that will entice them to exchange personal information, providing industry with a diverse arsenal of value exchange options to use to engage different consumer groups.

In the 2020s, more innovative, visible and compelling incentivization strategies will be important in ensuring that brands and organizations have sustainable access to the required levels and forms of consumer data needed to drive commercial and competitive success.

The consumer capitalist mindset remains a core feature in the US

It is now a majority of US consumers who view their personal data as an asset that they can utilize to drive better prices and offers from brands. Over 1 in 2 (55%) Americans now hold this view, compared to 48% in 2018. Such agreement reaches 69% among those aged 35-44 and remains above 50% for all age groups under 65. Among those 65+ agreement does drop, to around 1 in 3 (35%). Also significant is the gender gap, with just 49% of US women seeing their data as an asset compared to 62% of US men.

"I see my personal information as an asset that I can use to negotiate better prices and offers with companies" | % who agree strongly or agree

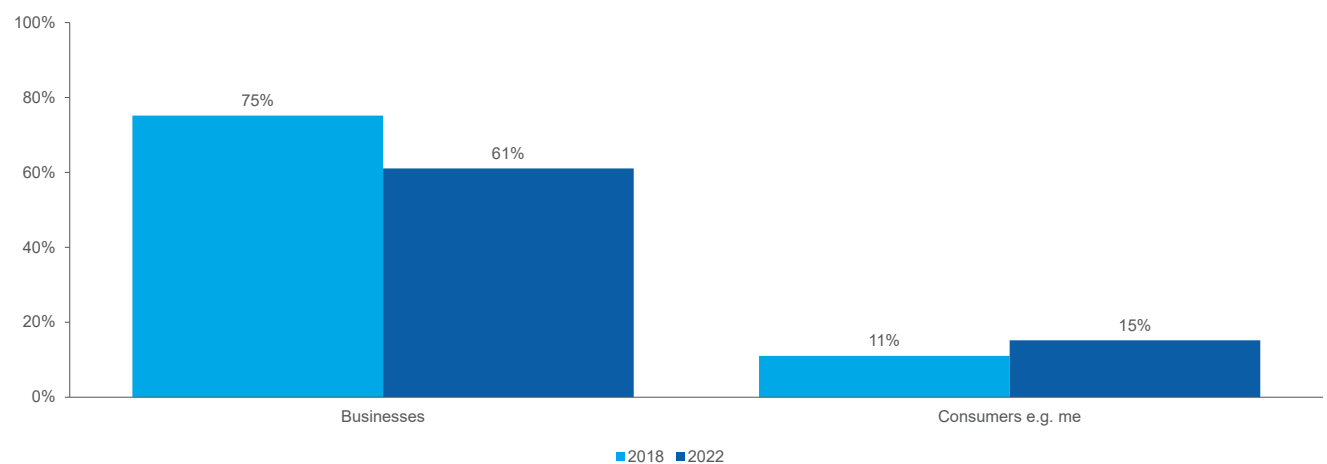


Consequently, since 2018, there has been a notable trend toward a US consumer landscape that is more likely to view personal data as having intrinsic value that can be used to gain personal advantage within the data economy. However, such attitudes will need to become more equally distributed across age groups and genders if all parts of US society are going to develop stronger engagement levels with the data economy in the 2020s.

Most US consumers believe that industry benefits most from data exchange

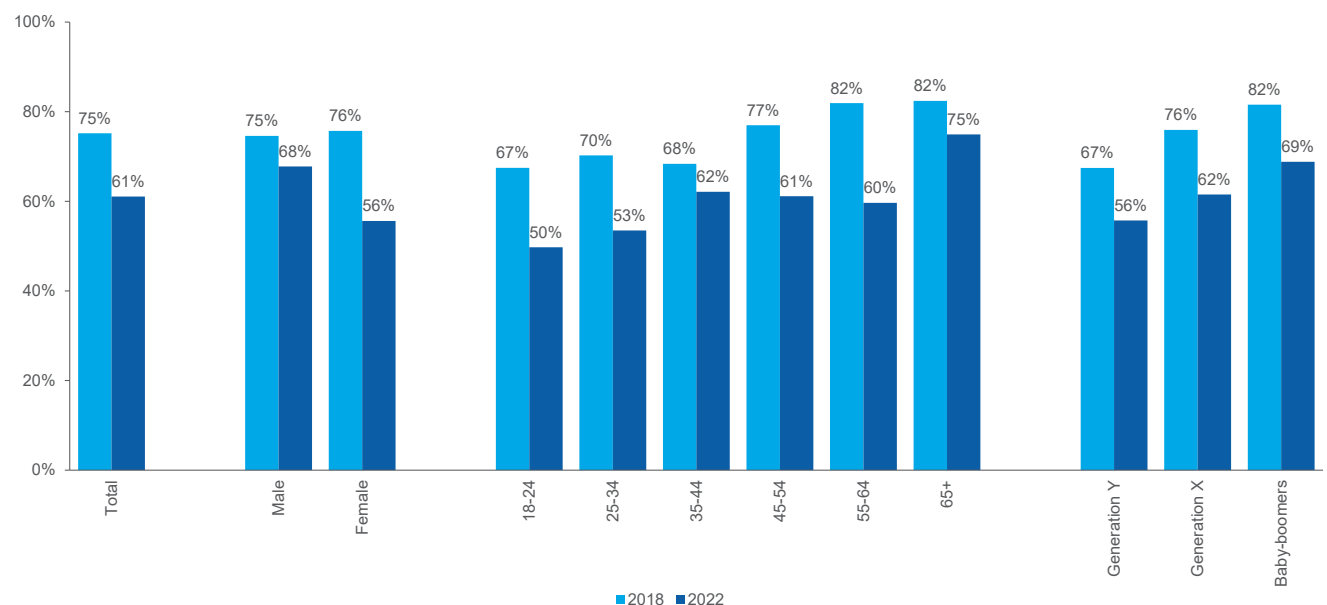
There has been a notable decline in the number of US consumers who claim that businesses benefit most from data exchange, dropping from 75% in 2018 to 61% in 2022. However, this remains the dominant mindset, with just 15% claiming that consumers benefit most in 2022. It should be noted that there has been an increase in the belief that consumers benefit the most from data exchange, rising from 11% in 2018 to 15% in 2022. Indeed, while the majority of US consumers still do not believe that they are being rewarded by the data economy to the same degree as industry, there has been a shift toward a slightly more balanced picture since 2018.

“In your opinion, who currently benefits the most from personal data exchange in the US?”



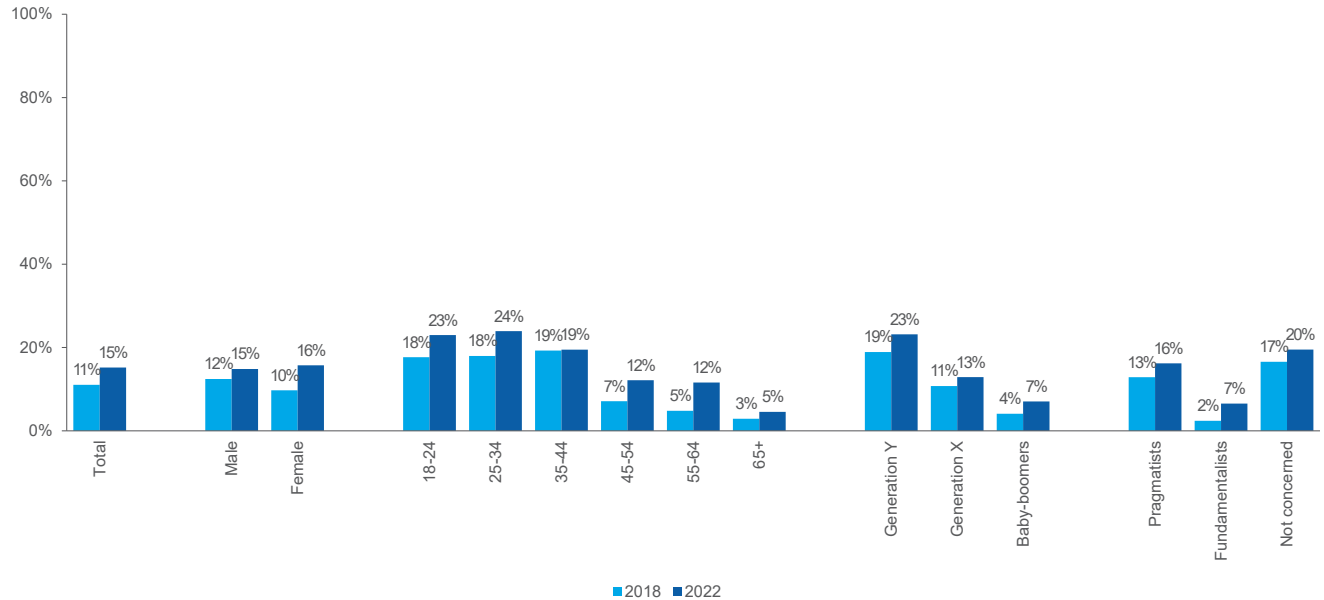
In line with the national trends, the belief that industry benefits most from personal data exchange has fallen across all age groups. Indeed, it is now just half of 18-24s who hold this view and 53% of those aged 25-34. However, belief that industry benefits most from data exchange is higher among older age groups, reaching 3 in 4 of the 65+ cohort, although this has dropped from 82% in 2018.

“In your opinion, who currently benefits the most from personal data exchange in the US?” % selecting businesses



Along with lower numbers of US consumers claiming that business benefits most from data exchange, growing numbers agree that consumers themselves are gaining the greatest advantage. It is now almost 1 in 4 of those aged 18-34 in the US who claim this, compared to just 5% of those aged 65+.

“In your opinion, who currently benefits the most from personal data exchange in the US?”
% selecting consumers

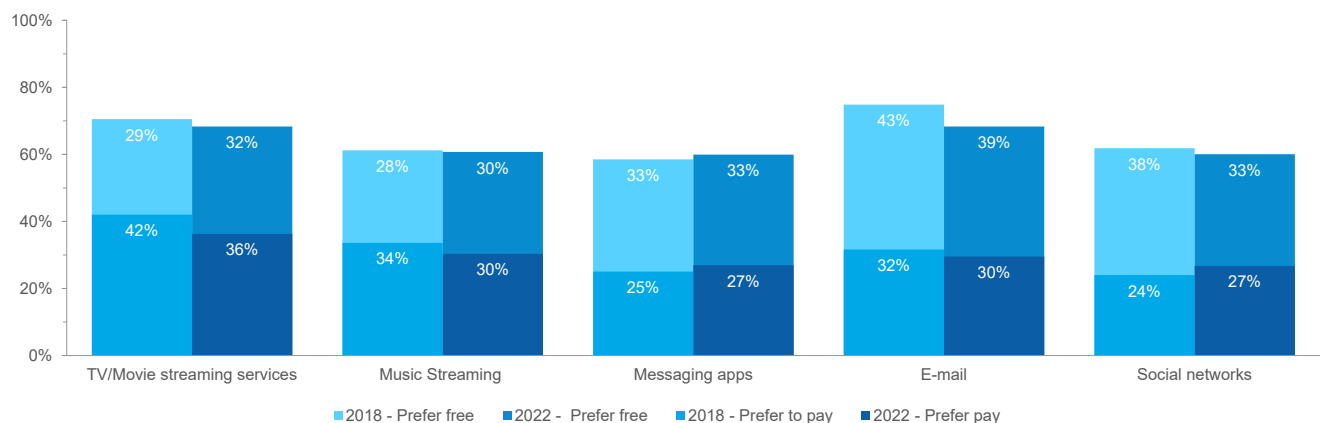


While it is clear that the majority of the US public continues to believe that industry is gaining the most advantage from data exchange in 2022, there are signs of a shift toward a consumer landscape that is perceiving a growing and more proportional level of personal benefit vis-à-vis businesses.

Challenges for the current US data economy: public perceptions of the current and future value exchange

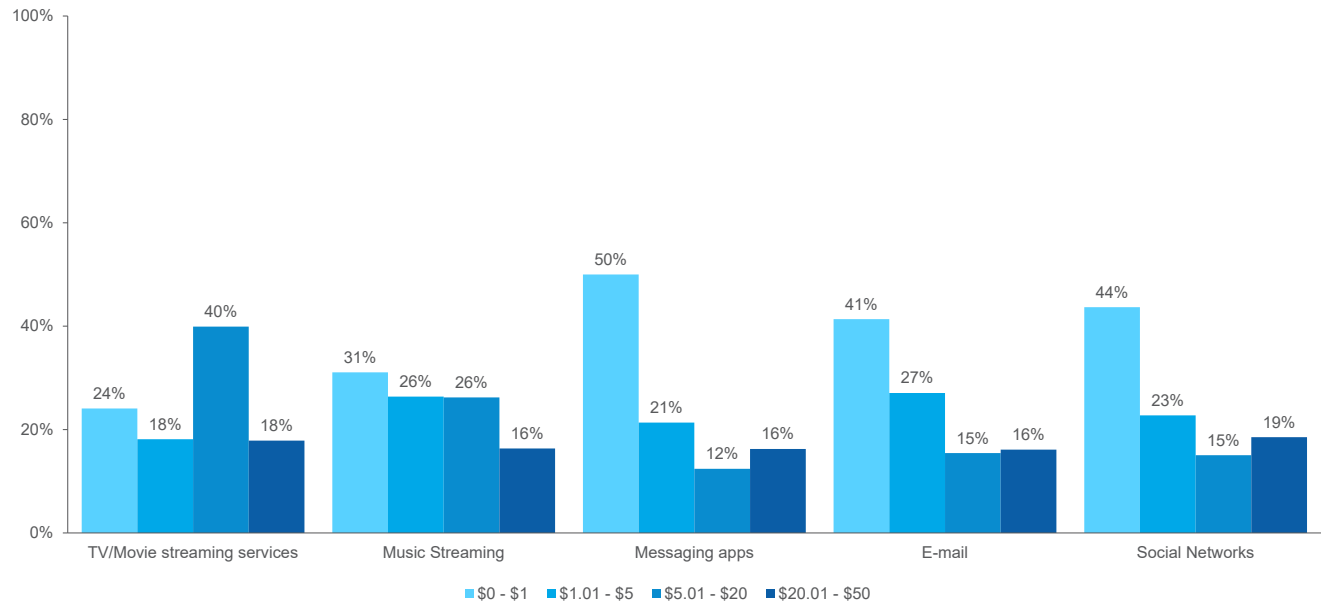
In 2022, US consumers remain more likely to exchange data than pay for messaging apps, email and social networks. Such findings are consistent with the current business models available for such services, i.e., those services that are currently free on the premise of exchange of personal data are the same services that consumers most want to maintain this value exchange model for. It is also interesting to note that equal numbers in the US would now prefer to share data to receive music streaming services for free as would prefer to pay directly. This indicates that even for services that are traditionally paid for, there is a shift toward a preference for data sharing-led value exchange models. Indeed, the gap between those who would rather pay for access to TV/movie streaming services vs. those who would prefer to share data has reduced notably since 2018.

For each of the following services please state whether you would prefer to pay for the service or share personal information in exchange for free access to the service



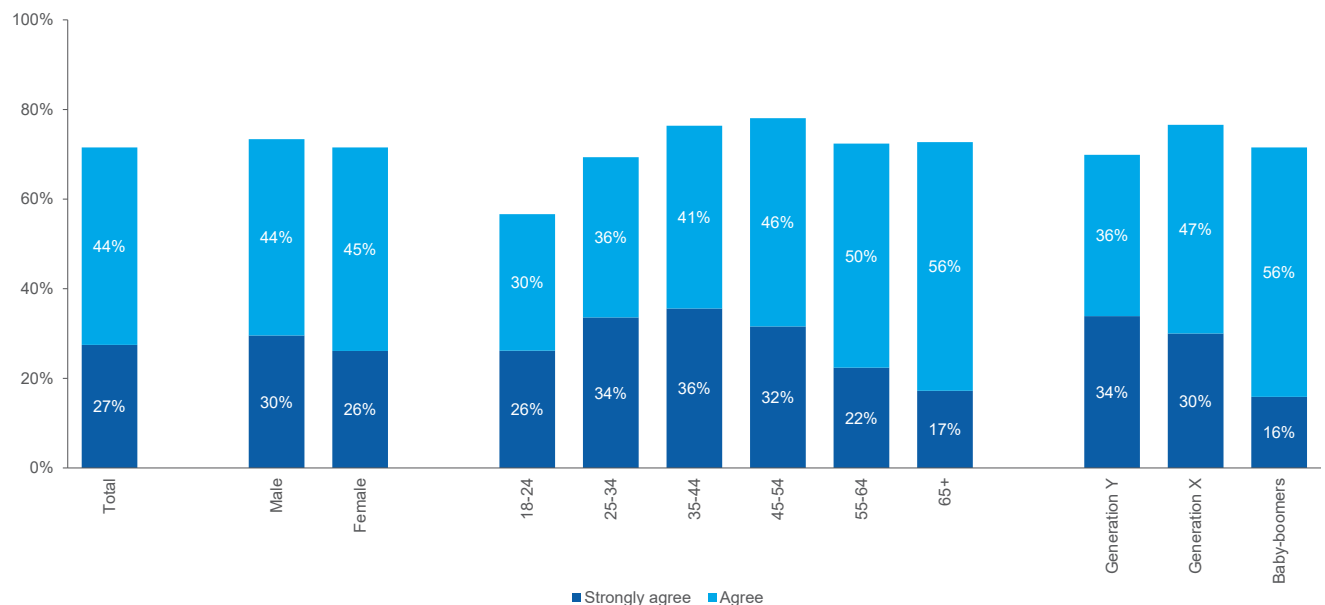
However, a significant minority in the US would still prefer to pay for services currently free today rather than exchange their personal information for access. Yet, it should be noted that a clear majority of US consumers who would rather pay for typically freely available services (messaging apps, email and social networks) claim that they would only be prepared to pay a maximum of \$5 a month to access these services. What's more, 1 in 2 would only pay up to \$1 a month for messaging apps over the exchange of data, as would 44% for social networks and 41% for email services.

What would be the most you would be willing to pay per month for each service?



Looking at consumer expectations of the future value exchange within the data economy over the longer term, the findings presented here point toward a disconnect between consumer expectations for data sharing and access to continually enhanced levels of service. In 2022, 7 in 10 (71%) American consumers claim that they expect companies to keep improving the levels of personalization they provide without having to share more personal information. However, such attitudes are less apparent among younger age groups, falling to just over half (56%) of 18-24s.

"I expect companies to keep improving the levels of personalization they provide without having to give them more of my personal information" How much do you agree or disagree with the following statements? | % who agree



Taken together, these findings point to the risk of a future divide between the data sharing requirements for sustainable engagement with the data economy and current public attitudes in the US. For US brands, the challenge will be to communicate the value exchange on offer today, as well as promoting the future value offered by expanded data sharing that will drive better innovation and optimized consumer services/experiences in the 2020s.

Foundations for a healthy data economy

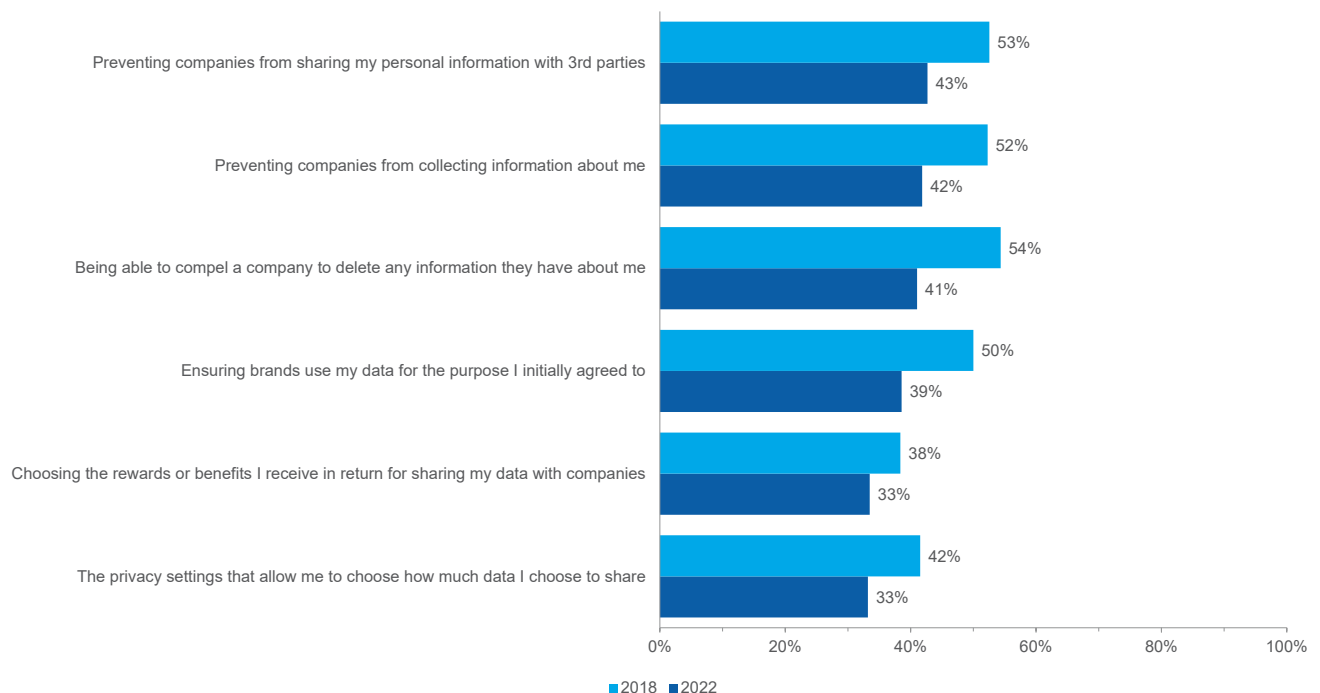
The three foundational pillars of positive engagement with the data ecosystem outlined in 2018 – control, trust and transparency – remain integral in 2022. However, as attitudes and mindsets of the US public have developed over this time, consumer expectations around these pillars have also evolved.

Control remains key

US consumers indicate a significant increase in the amount of control they feel they have over their data exchange with brands. Indeed, the number of consumers who believe they have no control over aspects of their personal information has declined considerably since 2018. For example, in 2022, 39% of consumers in the US believe that they have no control in ensuring that brands use their data for the purpose they had initially agreed to, down from 50% in 2018. In addition, 1 in 3 now claim they have no control over the privacy settings that allow them to choose how much data they share, compared to 42% in 2018. Evaluating all options surveyed, it is apparent that the majority of American consumers now claim to have a relatively high level of control over core aspects of their data exchange with brands.

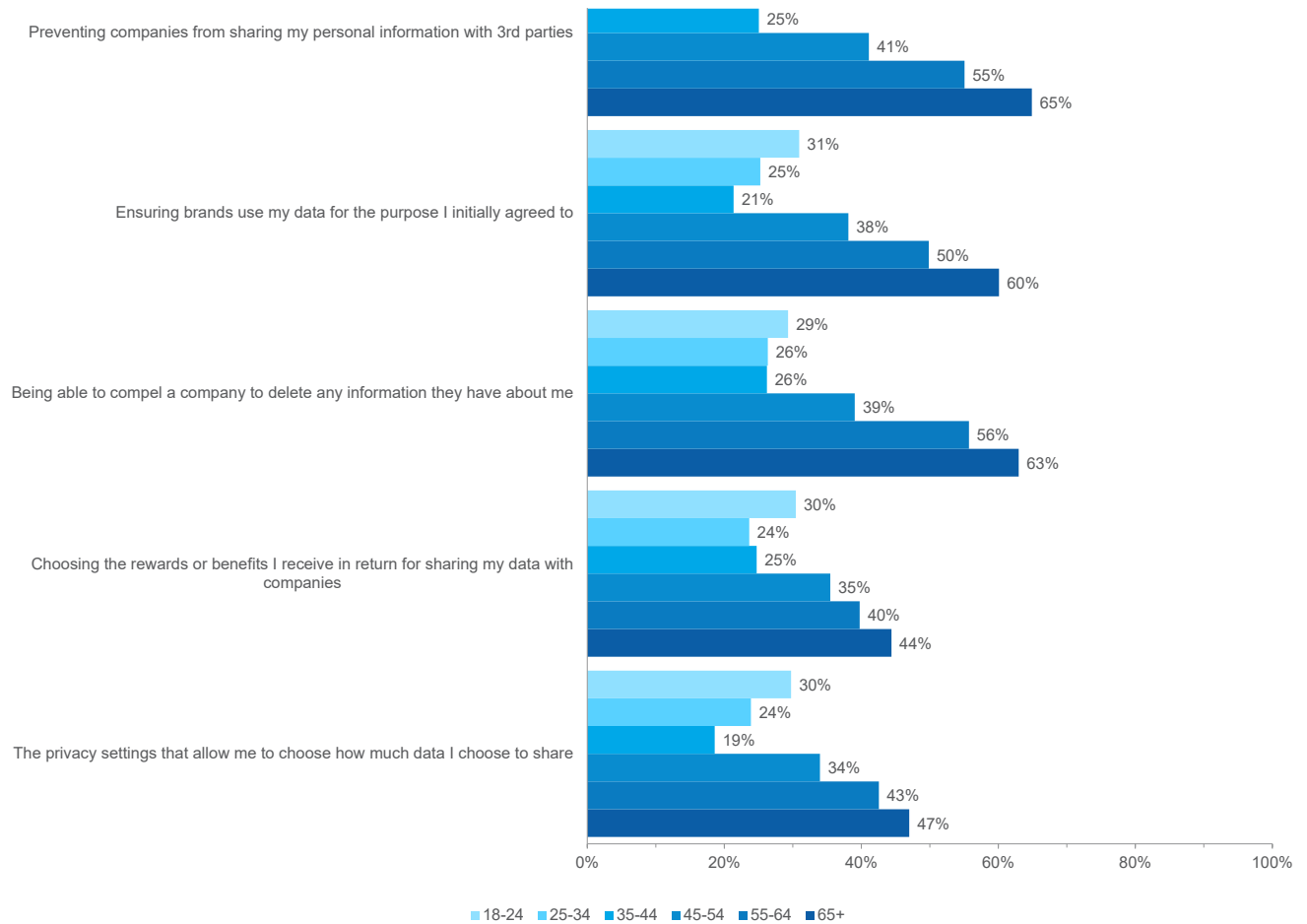
How much control do you think you have over the following?

Net: Does not feel they have any control



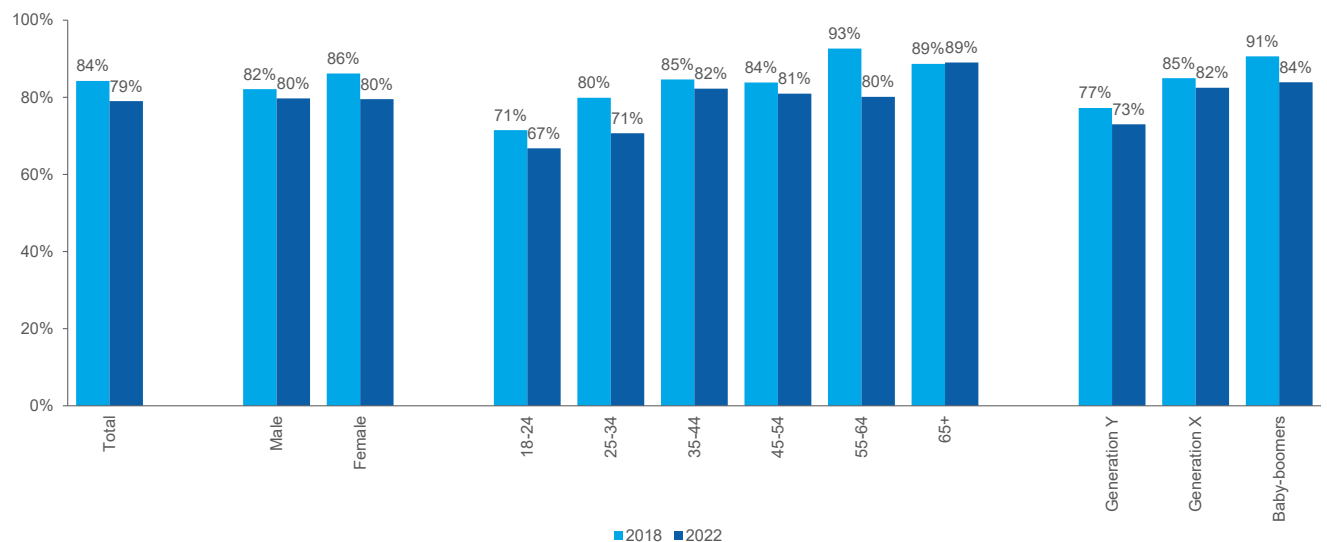
Despite overall increases in consumer control over the exchange of data, such attitudes vary dramatically by age. For example, less than 1 in 3 of consumers under 45 claim they do not have control over preventing companies from collecting information about them, compared to 64% of those 65+. Such findings suggest that the increased level of control felt by younger age groups is a driving factor of their increased levels of comfort with data sharing as outlined in part 1 of this report.

How much control do you think you have over the following? Net: Does not feel they have any control, by age



While there have been clear improvements in consumer control over their data exchange in the US, consumers continue to demand even higher levels of control. In 2022, 8 in 10 (79%) US consumers would like more control over the personal information they give companies and the way in which it is stored. The demand for increased control is most notable among older age groups, reaching 9 in 10 (89%) among 65+.

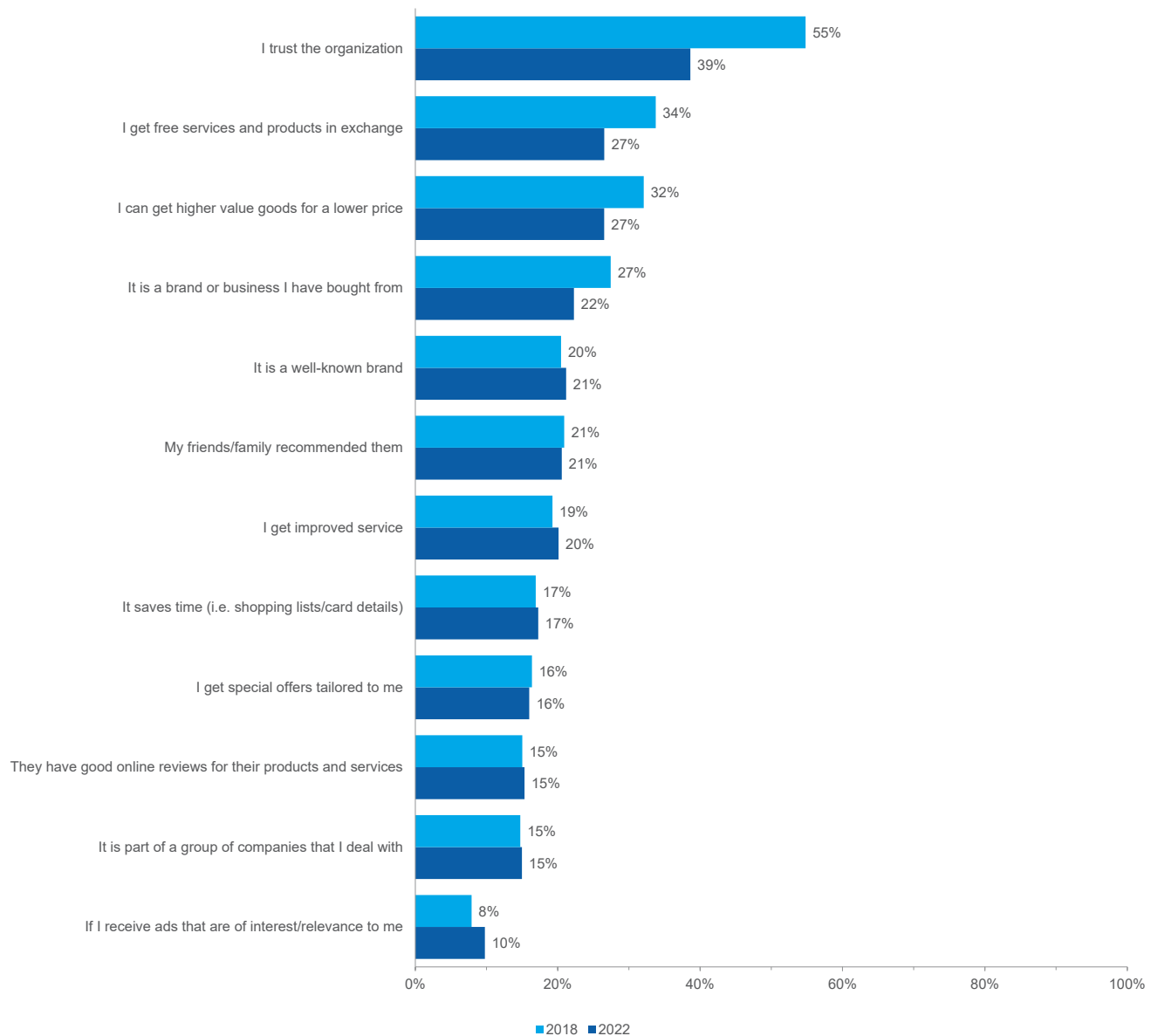
“I would like more control over the personal information I give companies and the way in which it is stored” | % who strongly agree or agree



Building trust remains paramount

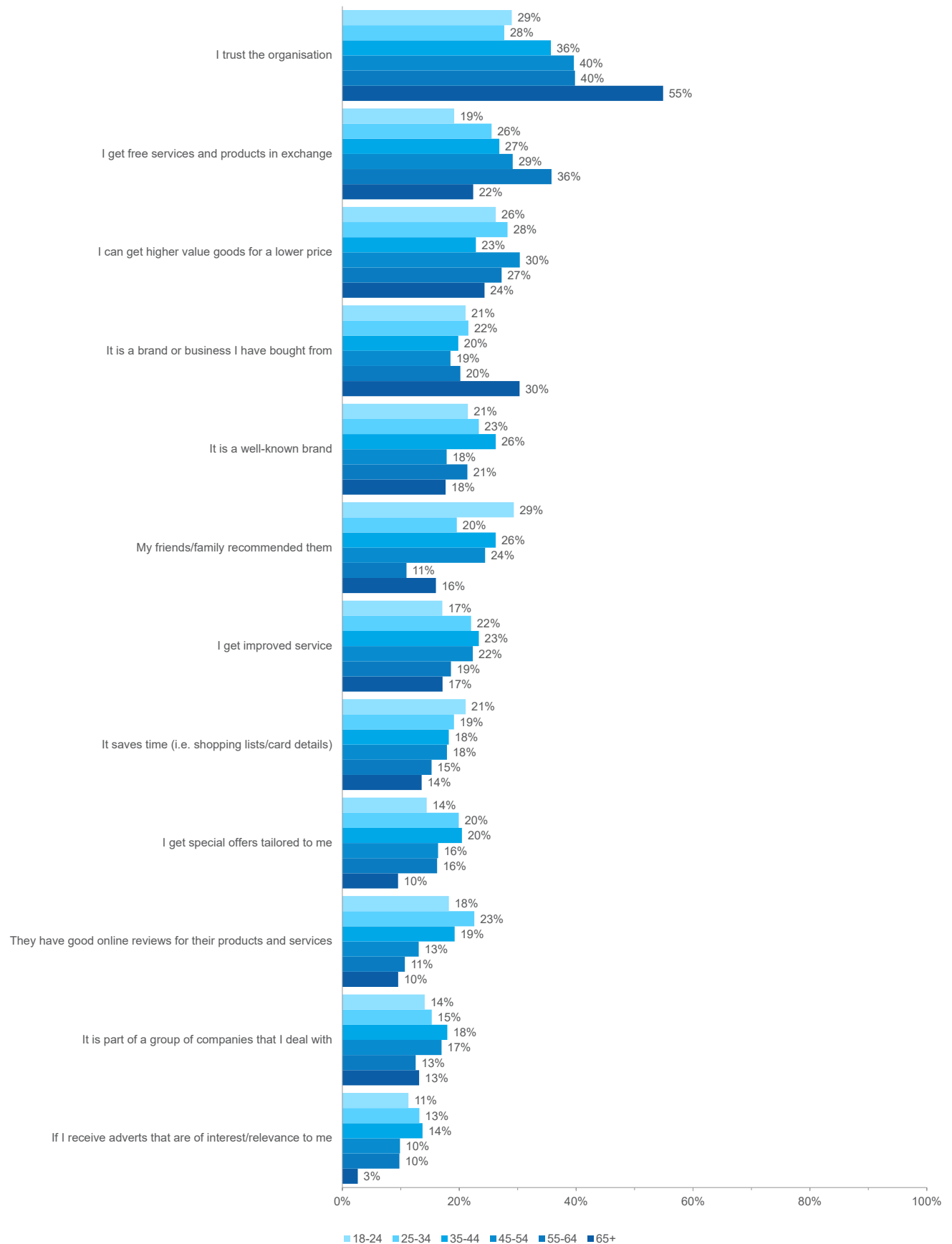
Trust in an organization continues to be the most important factor in influencing consumer happiness with sharing personal information with a company. While it has declined in importance since 2018, it remains the top influencer in facilitating data sharing, followed by cost-related benefits. Indeed, in 2022, 1 in 4 US consumers (39%) place trust in an organization in the top three factors that make them happy to share their personal information with a company. This is followed by receiving free products and services in second place.

Please rank the following in terms of what makes you happy to share your personal information with a company? | Net: Top 3



The importance of trust in an organization in driving data sharing is significantly higher for older age groups. For example, 55% of those aged 65+ place trust in an organization in the top 3 factors that make them happy to share their personal information with a company, compared to under 1 in 3 consumers aged 18-34.

Please rank the following in terms of what makes you happy to share your personal information with a company? | Net: Top 3, by age

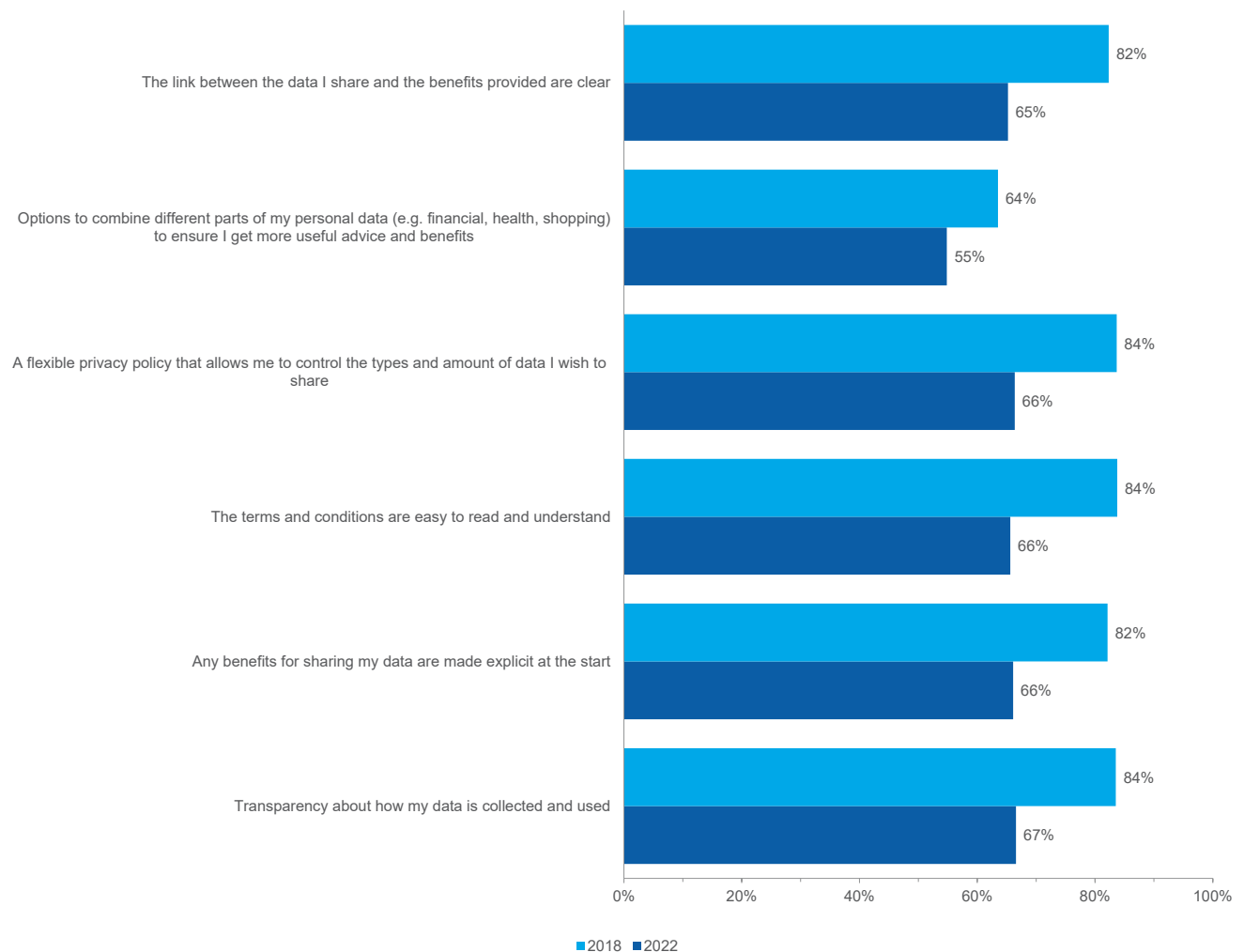


As younger consumers display lower levels of privacy concern, higher levels of comfort with data sharing and a greater sense of control over their data exchange with brands, this has potentially resulted in trust in an organization becoming less of a critical factor as they feel more empowered in their personal interaction with industry within the data ecosystem.

US consumers continue to seek transparency as a precursor to data sharing

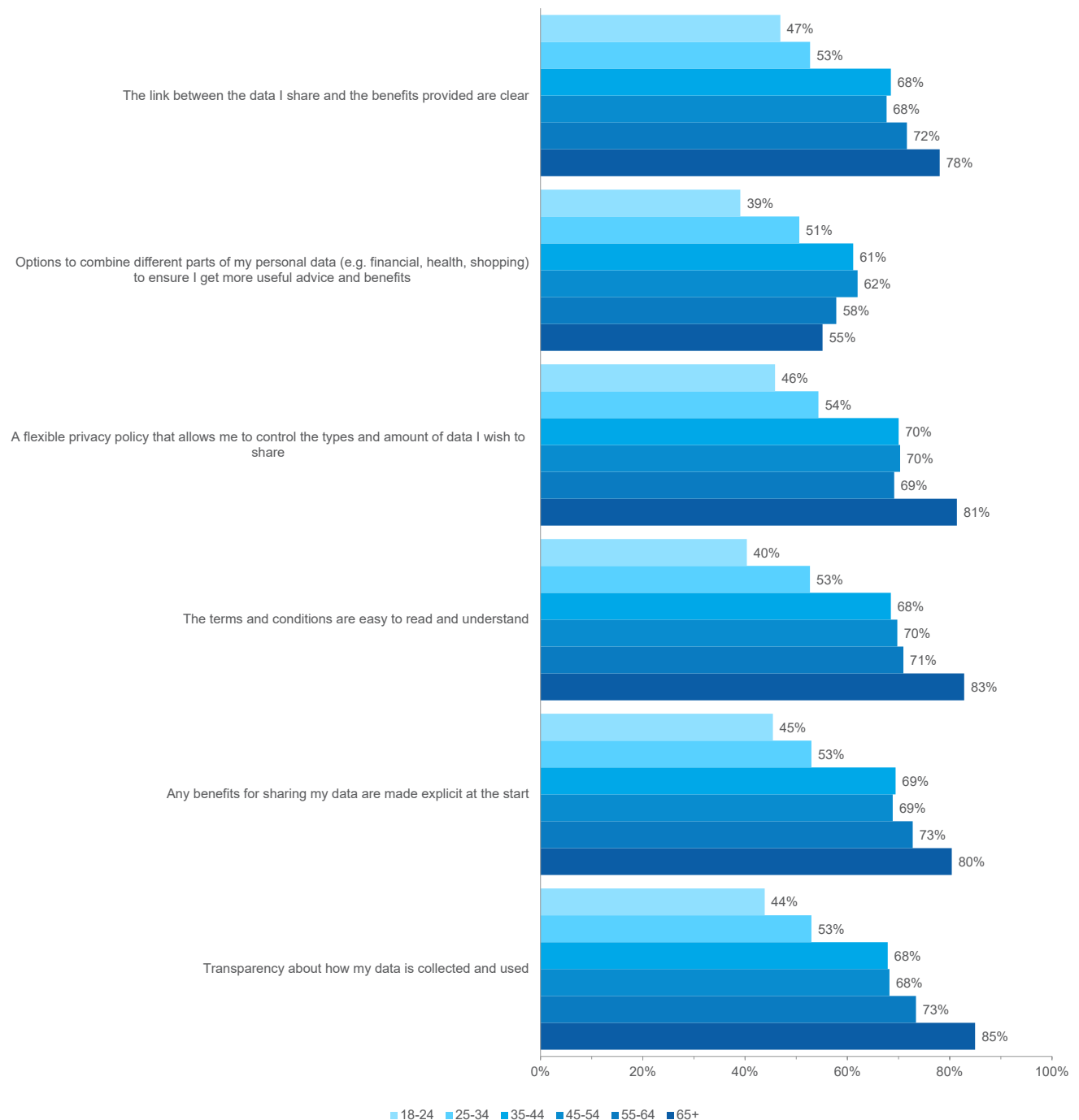
Transparency remains an important factor for American consumers when it comes to sharing personal information with a brand or organization. However, its relative importance has declined over the previous 4 years. In 2022, 2 in 3 (67%) consumers state that transparency about how their data is collected and used is important to them when sharing their personal information, down from 84% in 2018. Moreover, 2 in 3 continue to claim that having terms and conditions that are easy to understand is important, but this has also declined from 84% in 2018.

How important are each of the following to you when sharing your personal information with a company? | Net: Very Important & Important



As with control and trust, older consumers in the US indicate far stronger demand for transparency compared to younger age groups. For example, almost twice as many of those 65+ (85%) claim that transparency about how their data is collected and used is important to them vs. those aged 18-24 (44%).

How important are each of the following to you when sharing your personal information with a company? | Net: Very Important & Important, by age

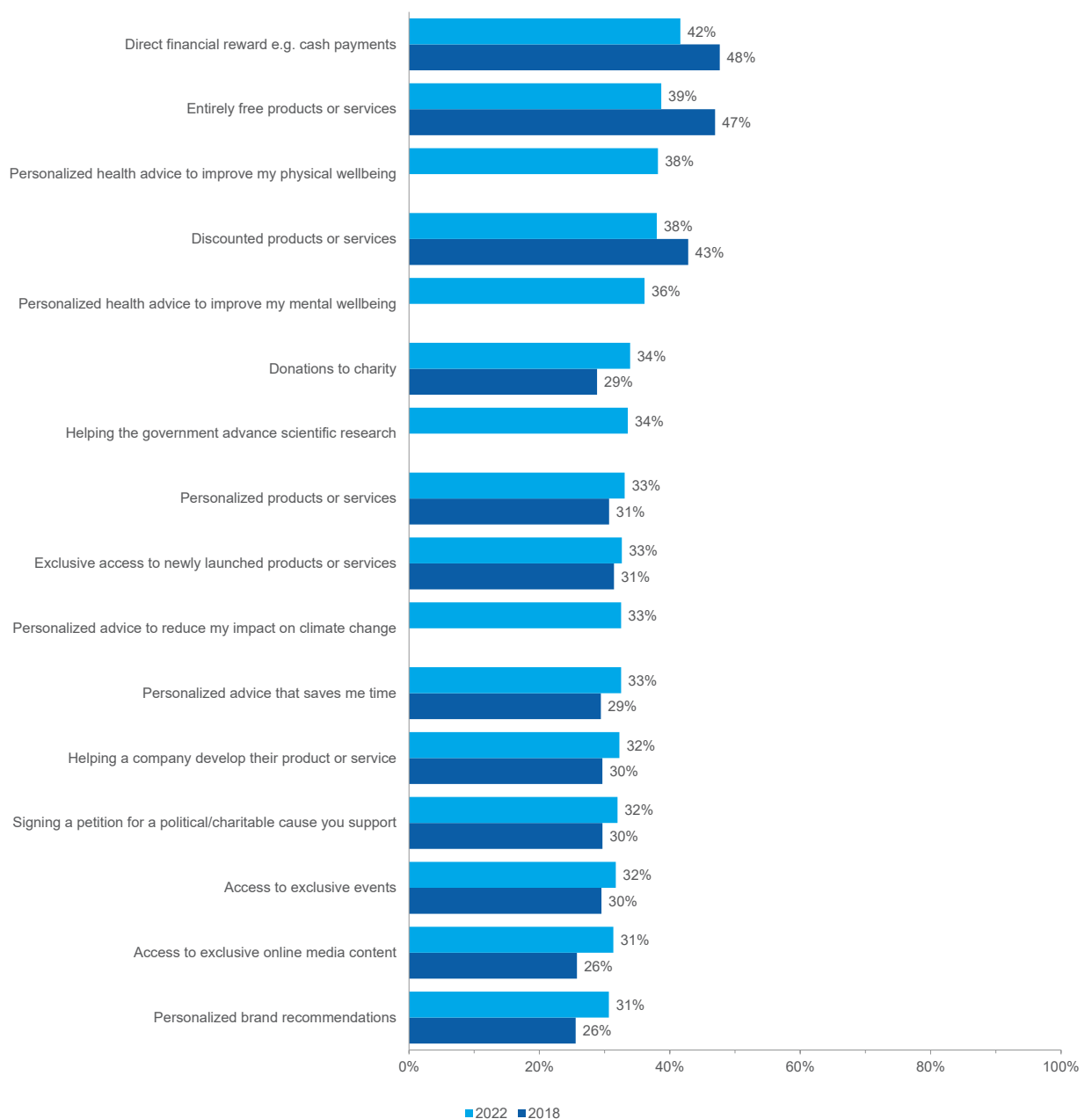


Overall, the findings highlight that transparency remains a core pillar that drives trust and willingness to engage with the data ecosystem for the majority of consumers across most age groups, albeit a more fundamental factor for older consumers.

An array of incentivization strategies exist to engage the American consumer

When testing the forms of incentives that would most entice US consumers to share personal information – across a wide spectrum of enhanced rewards and services – there has been a notable decline in benefits linked to direct financial reward and increased interest in incentives that provide enhanced levels of personalization across service, product and marketing. For example, the proportion of US consumers who claim they would be likely to share their personal data in exchange for a direct financial reward has declined from 48% in 2018 to 42% in 2022. At the same time, those claiming they would be likely to exchange data in return for personalized advice that would save them time has risen from 29% in 2018 to 33% in 2022.

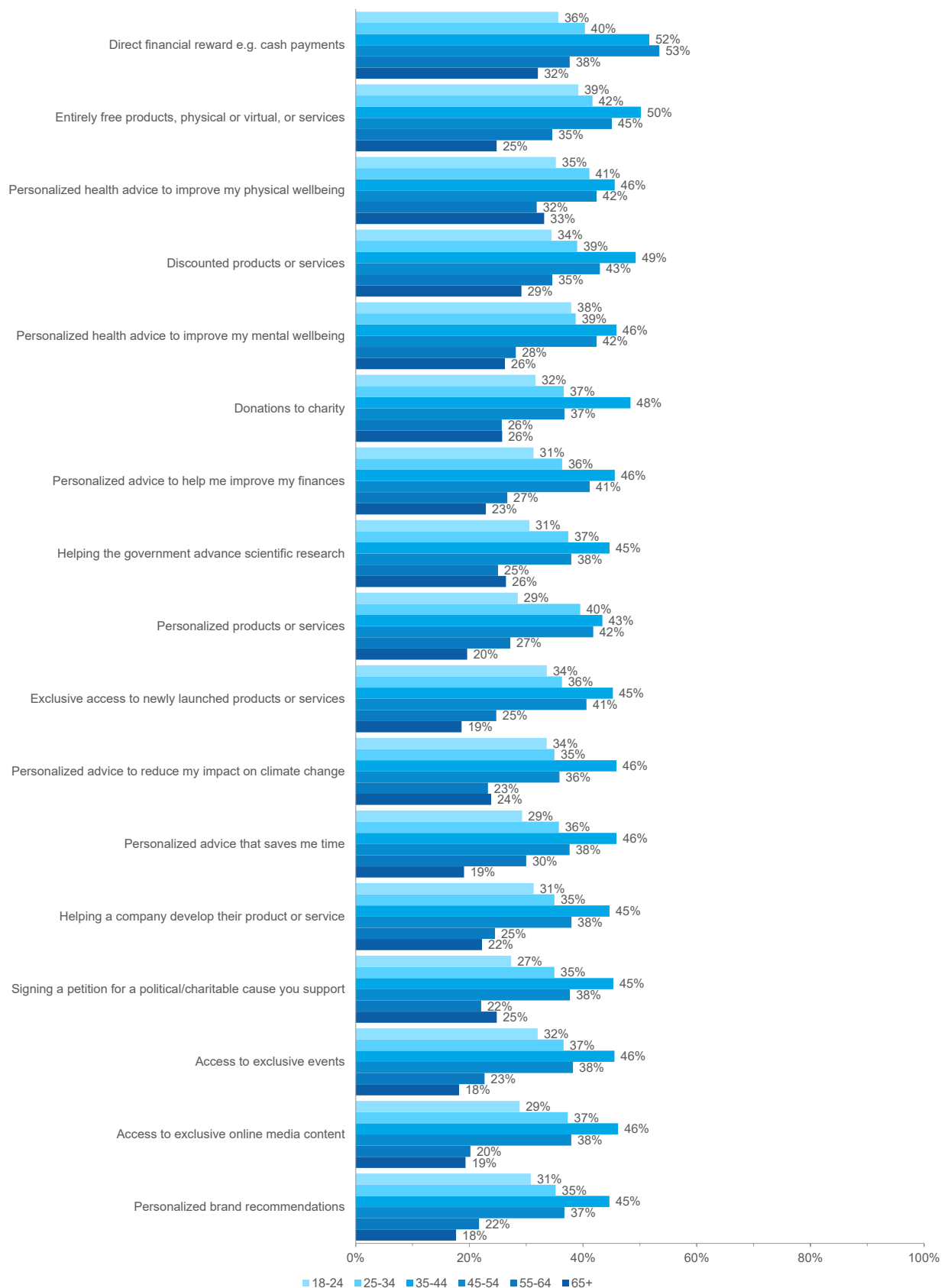
“How likely would you be to share your personal information in exchange for the following incentives?” % who select each option | % who say likely (1-4)



The findings further suggest that the COVID-19 pandemic has increased the value placed on data sharing incentives linked to providing healthcare advice and services. In 2022, receiving personalized health advice to improve physical wellbeing ranked as the third most enticing type of incentive for US consumers, only behind direct financial rewards and free products/services.

Finally, it should be noted that the age of a consumer heavily influences the extent to which they are interested in different data sharing incentives. While less the case with incentives based on direct financial reward, for the majority of benefits tested, levels of interest fall among older age groups. For example, 4 in 10 consumers aged 25-54 would be likely to share their data in return for personalized products or services, compared to just 20% of those aged 65+.

“How likely would you be to share your personal information in exchange for the following incentives?” % who select each option | % who say likely (1-4), by age



Despite the differences by age, there remains a clear spectrum of incentives that brands and organizations can deploy to enhance data sharing in the US. The core challenge will be to decode the precise forms and combinations of incentives that will most entice and reflect the needs of different segments of society.

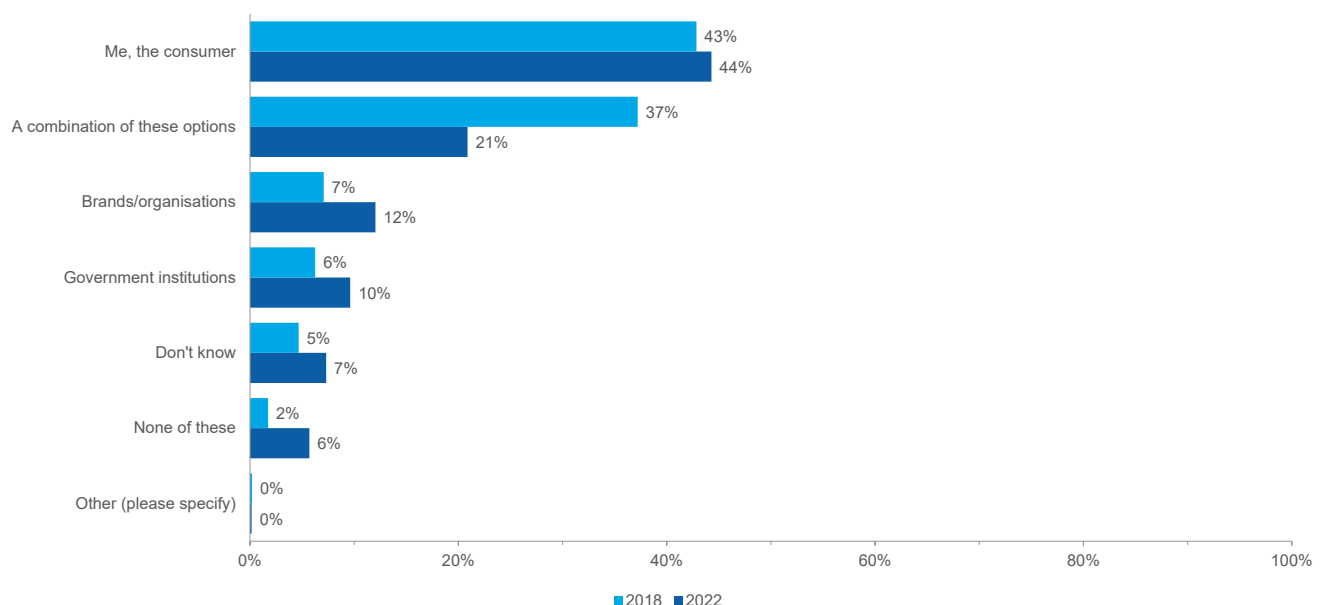
PART 3: RIGHTS AND RESPONSIBILITIES

In this part of the report, we explore US consumers' attitudes to their personal data rights and responsibilities, as well as their awareness of regulatory data protections. In 2022, American consumers continue to place most responsibility on themselves for their own data security. However, there has been a notable shift toward expectations of institution-led (brand and government led) responsibility for consumer data security. However, trended data demonstrates a slight decrease in awareness of data protection regulations in the US. Countering this trend and promoting wider regulatory awareness will help empower more confident and positive engagement with data exchange over the coming decade.

Relatively high levels of individual responsibility remain, but growing expectations are placed on industry and government

In 2022, more consumers in the US place responsibility on their personal data security on themselves compared to on brands, government, or a combination of these options. Over 4 in 10 (44%) claim that consumers should have ultimate responsibility for their own data security, broadly in line with the findings from 2018 when 43% selected this option. This compares to 12% who selected brands and 10% who selected government. However, both these options have increased in prominence over the previous 4 years. For example, just 7% of US consumers stated that brands should have ultimate responsibility for their data security in 2018, compared to 12% in 2022.

"In your opinion, who should have ultimate responsibility for your data security?" % who selected each option

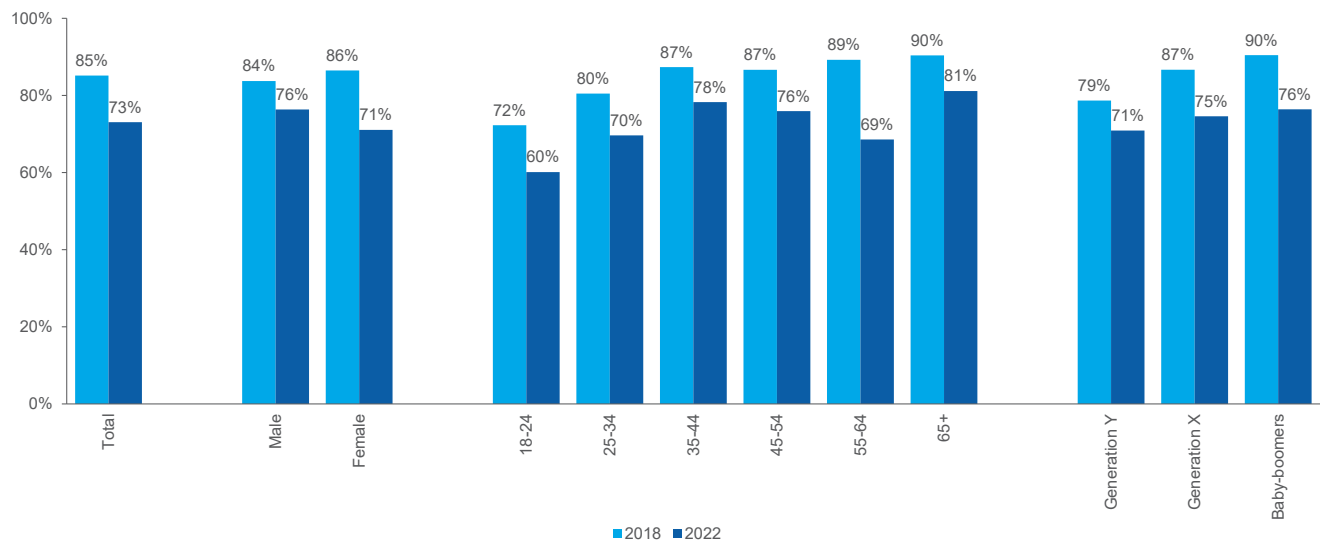


Interestingly there has been a significant decline in US consumers selecting a combination of options. This has been driven by younger age groups in the US being more likely to specifically select brands or government compared to older consumers. For example, around 1 in 2 consumers aged 25-44 state that brands should have ultimate responsibility compared to just 6% of those 65+. At the same time, just 3% of the 65+ segment claim that government should have the core responsibility for their data security, compared to 16% of those aged 25-34.

News headlines continue to shape public attitudes toward personal data privacy

News stories about data security continue to influence the opinion of a clear majority of the American public. However, this influence has declined somewhat since 2018. Indeed, in 2022, 73% of US consumers indicated that recent news headlines had heightened their awareness of their own personal data privacy, down from 85% in 2018.

“Recent news headlines about data security breaches have heightened my awareness about my own personal data privacy” | % who strongly agree or agree

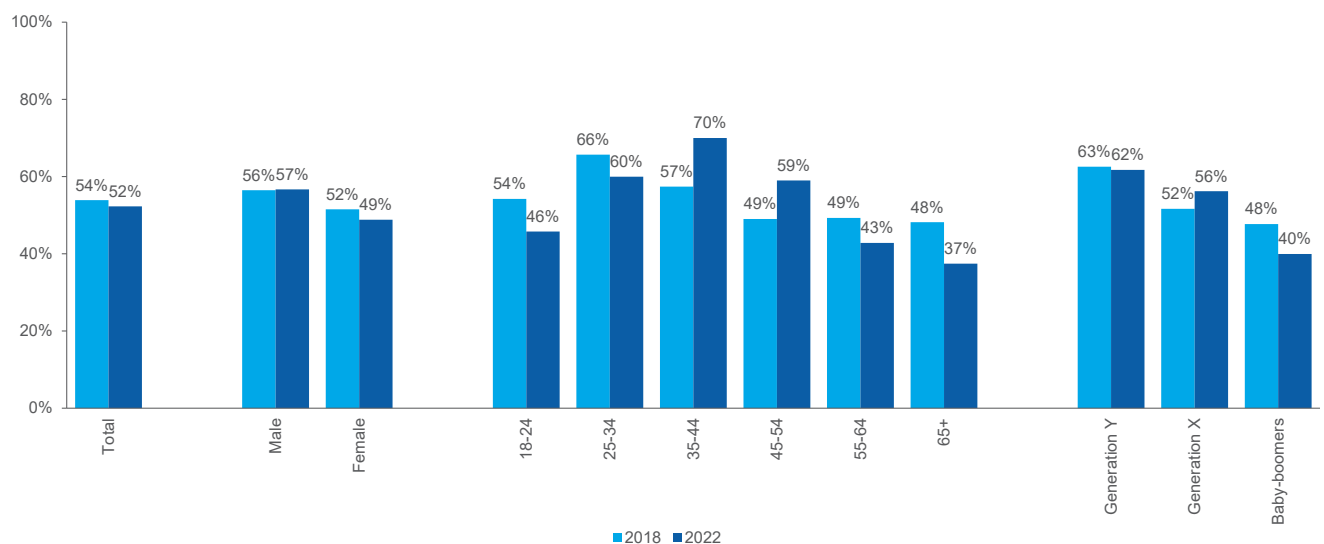


The influence of news headlines on attitudes toward data privacy are notably higher among older age groups. In 2022, just over 8 in 10 (81%) US consumers aged 65+ claim that news headlines are influential, compared to 6 in 10 of those aged 18-24.

Public awareness of data security regulations remains broadly unchanged

In 2022, 52% of American consumers state that they are aware of the data protection regulations in their country. This is down slightly from 54% in 2018. However, changes in awareness of data protection regulations varies considerably by age. Indeed, among Americans aged 35-54, awareness has actually increased, while for all other ages there has been a decline. Among those aged 35-44, regulatory awareness reaches 70% in 2022, but such figures fall to a low of 37% among those 65+. What's more, US men also indicate higher levels of regulatory awareness compared to US women.

“How much do you agree or disagree with the following statements? I am aware of the data protection regulations in my country” | % who strongly agree or agree



Taken together, the findings presented here show a US consumer landscape that continues to take personal responsibility for their data security. However, expanding awareness of data protection regulations, across age groups and genders, will assist further consumer comfort and engagement with the data ecosystem in the 2020s.

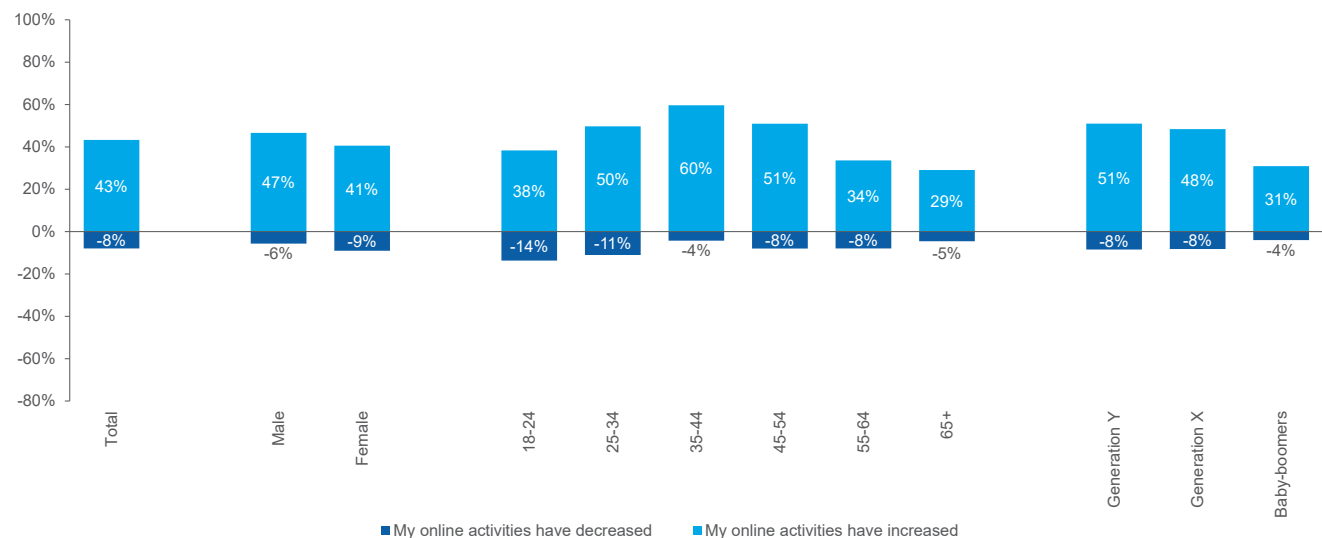
PART 4: EMERGING THEMES FOR THE DATA ECOSYSTEM IN 2022

In the final part of this report, we explore new and emerging themes shaping or impacting the future US data ecosystem that have been tested for the first time in 2022, from the impact of COVID-19 on data attitudes to the role of information sharing in facilitating a more diverse and competitive commercial landscape in the 2020s.

COVID-19 has accelerated engagement with the digital world, but has impacted attitudes toward data sharing differently across age groups

The COVID-19 pandemic has significantly increased the level of online activity in the US. In 2022, substantially larger numbers across all demographics state that the pandemic has seen their online activity levels increase (43% in total) compared to a small minority who claim these have decreased (8%).

How have your online activities changed, if at all, since before the start of the COVID-19 pandemic?

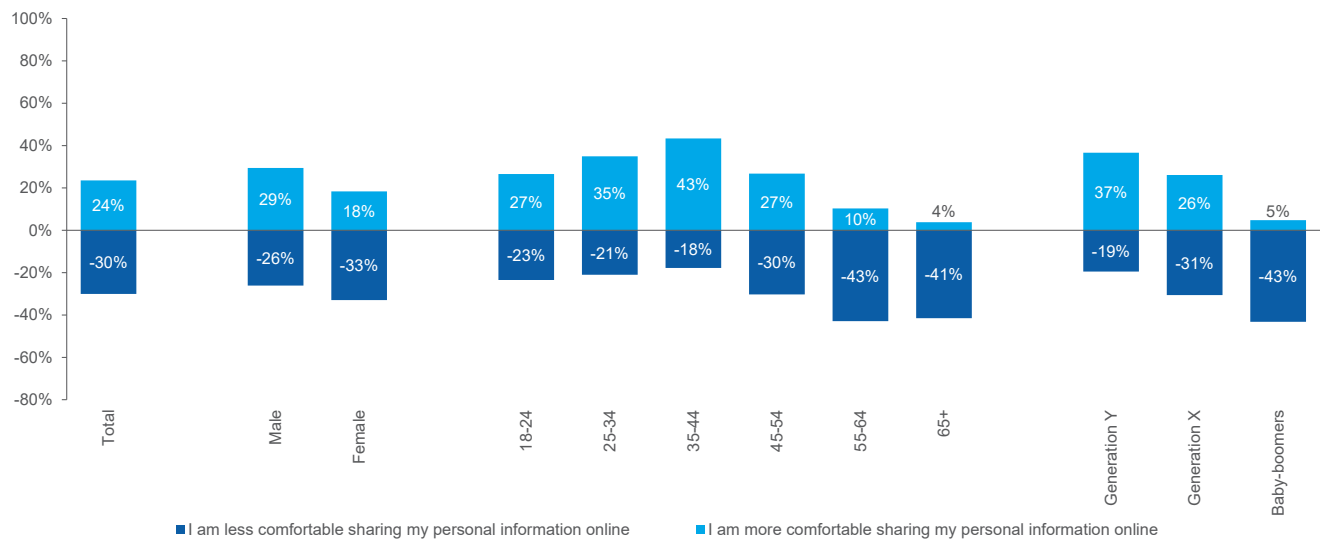


Changing living patterns during the COVID-19 pandemic – where how people work, shop, and socialise have all shifted to more digital channels – have clearly accelerated US public engagement with the digital world. As a result, more consumers, especially older ones, will have likely engaged more with the exchange of data.

However, when specifically asked about whether the COVID-19 pandemic has increased or decreased comfort levels with sharing data online, more consumers state that it has had a negative effect. Indeed, 24% of US consumers claim that their comfort level has increased vs. 30% who claim their comfort level has decreased.

On the one hand, such findings indicate that as more consumers have engaged with data sharing, this had led to a concurrent decrease in comfort with data sharing. However, it is important to note that such attitudes are heavily polarized across age and gender in the US. For instance, younger consumers in the US are far more likely to state that the pandemic has made them more comfortable with sharing data while older consumers are much more likely to claim the opposite. Among those aged 65+, 41% claim they are less comfortable vs. just 4% who are more comfortable. Conversely, among those aged 35-44, just 18% claim the pandemic has made them less comfortable sharing data compared to 43% who are more comfortable. More US men also indicate they are more comfortable with data exchange due to COVID-19 compared to US women (29% vs. 18% respectively).

How comfortable are you sharing your personal information online now compared to before the start of the COVID-19 pandemic?

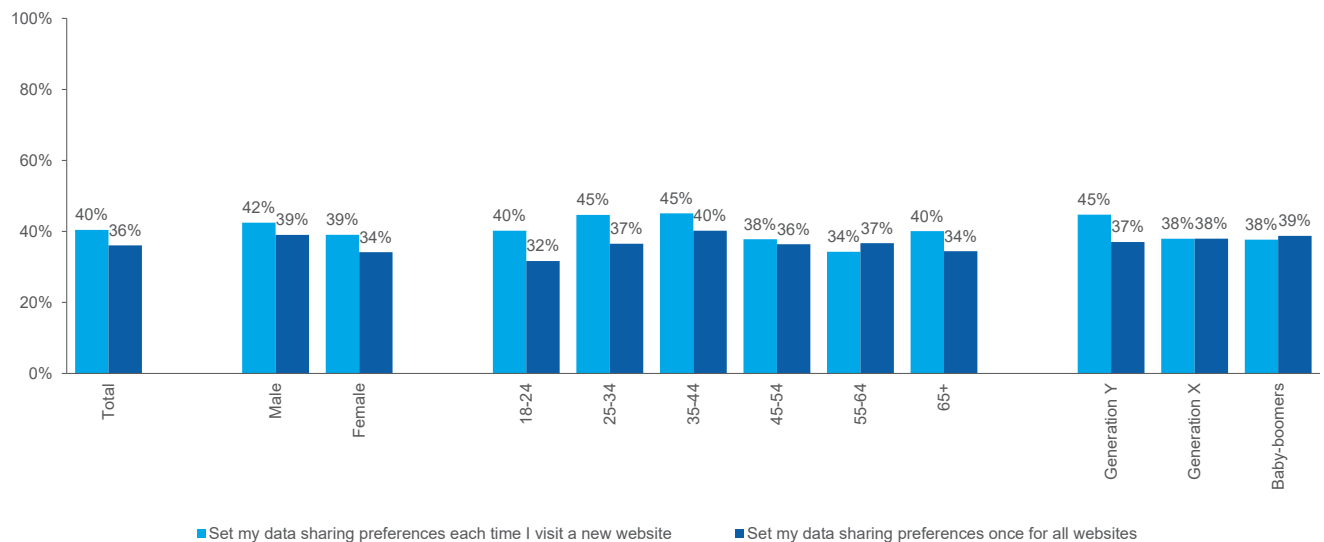


The accelerated levels of digital engagement necessitated by the pandemic have resulted in many consumer groups, particular older age segments, having to use digital channels and services more frequently (or even for the first time). The findings presented here indicate that such increased digital engagement has led to growing discomfort in older consumers regarding the role of data exchange as part of their expanded digital behavior. Such findings are consistent with the research outlined throughout this report which consistently highlights age as a key influencing factor in levels of confidence and comfort with interacting with the data ecosystem. Increased efforts to capitalize on wider societal engagement with the digital world, via initiatives aimed at increasing comfort with data sharing among older generations and across genders, will optimize wider consumer engagement with data exchange in the US throughout the 2020s.

American consumers demonstrate polarized views toward setting data sharing preferences online

When setting data sharing preferences online, 40% of US consumers state that they would prefer to set their preferences each time they visit a new website, compared to 36% who would rather set their preferences once for all websites. Across demographics and gender, the divide in preference remains relatively even. Such findings highlight a polarized US consumer landscape in terms of future interest and expectations for data sharing preference setting.

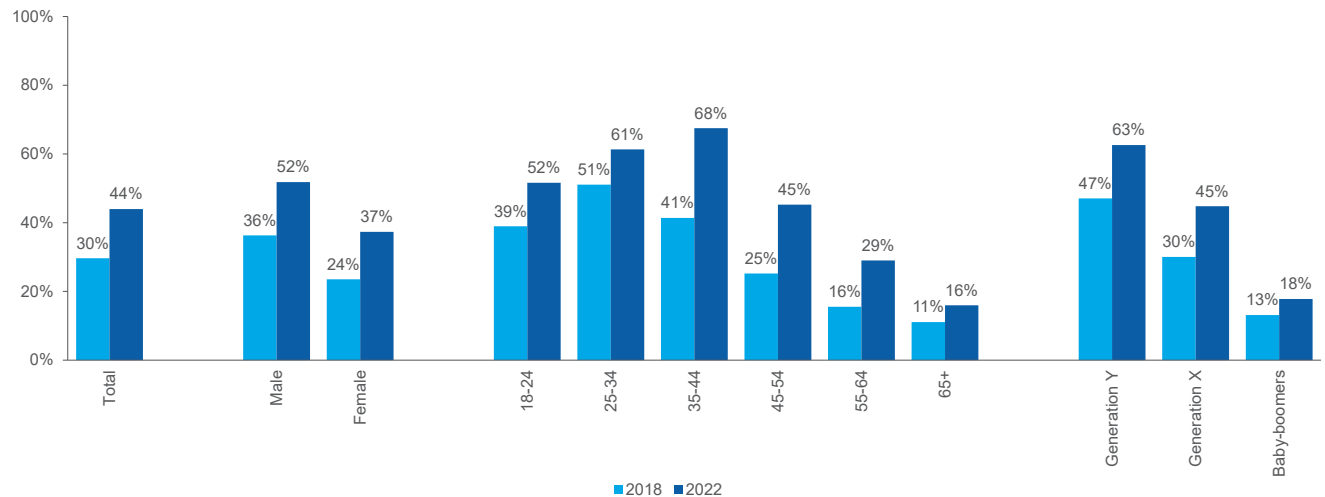
Which of the following ways of setting your data sharing preferences would you prefer?



Increased interest levels in B2B data sharing for service and product enhancements

Since 2018 there has been a clear increase in the proportion of US consumers who are happy for businesses to share their personal information with other organizations in order to deliver more personalized services and products. Agreement with this notion has increased from 44% in 2022, up from 30% in 2018. What's more, agreement levels rise even further to over 6 in 10 among those aged 25-44. However, such figures fall notably among older age groups; to a low of 16% among those 65+.

“I would be happy for a business to share my personal information with other businesses if it will give me more tailored services and/or products” | % who strongly agree or agree



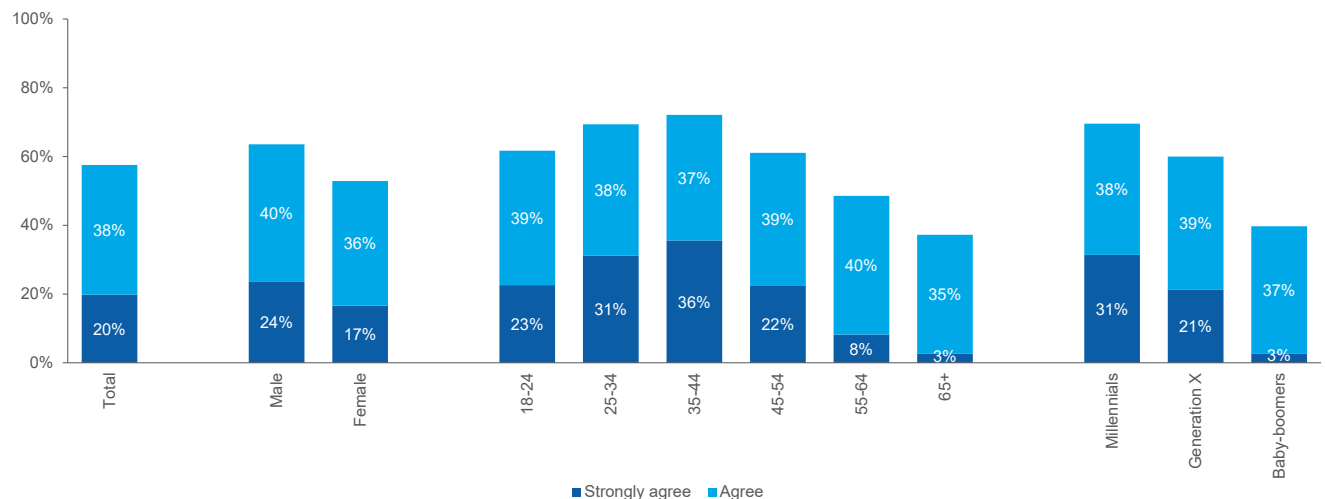
The increasing levels of interest shown in B2B data sharing should incentivize wider industry innovation in this space, seeking to develop more holistic and sophisticated data sets that can be utilized to better meet growing consumer expectations for improved levels of product, service, and marketing as a result of their engagement with data sharing.

High awareness of the role of data sharing in helping organizations respond better to the needs of all parts of society

The majority (58%) of consumers in the US agree that the sharing of personal information helps ensure that organizations can better meet the needs of a diverse society by better understanding the attitudes and wants of a wider range of groups and identities. Agreement with this notion reaches almost 1 in 4 (73%) among those aged 35-44 but falls among older age groups. There is also a notable gender gap in agreement levels, rising to 64% among US men but falling to 53% among US women.

“People sharing their personal information with organizations helps organizations develop a better understanding of different types of people in society”

How much do you agree or disagree with the following statements? | % who agree



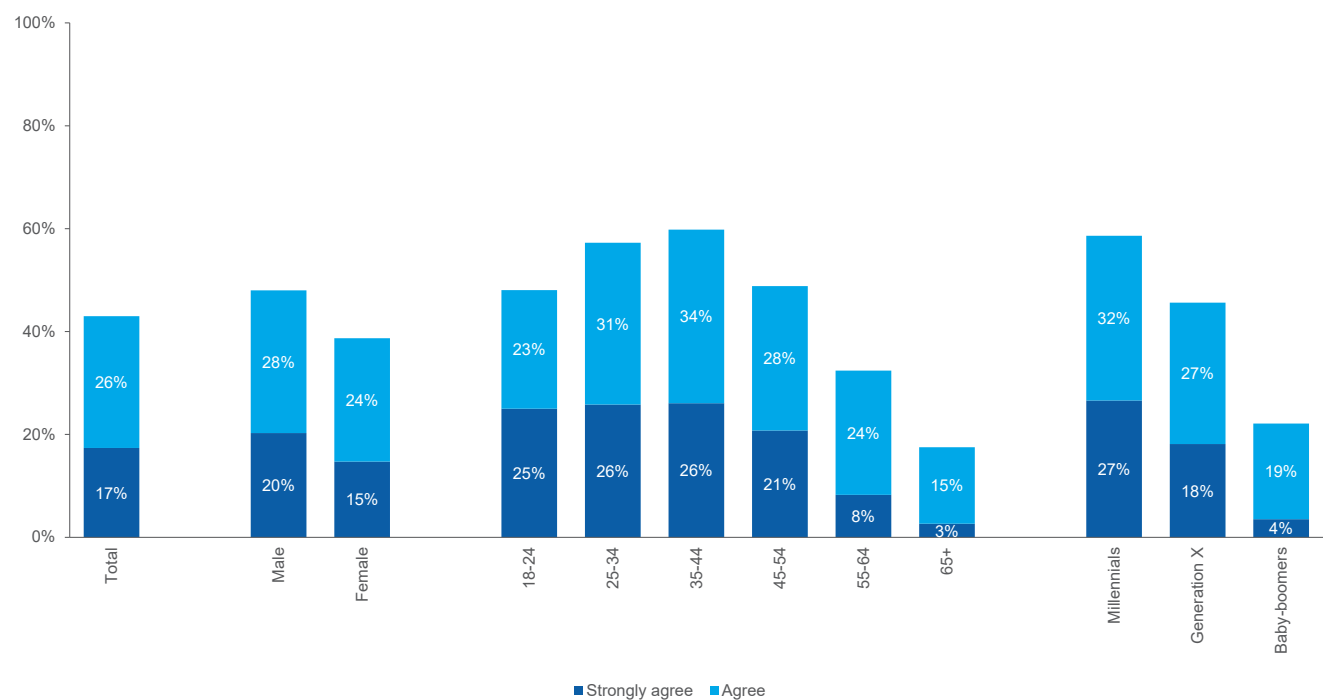
As the use of data becomes more central to the business practices of American brands, restricted access to the same levels of data across different groups in society will risk marginalized groups emerging who are less understood and catered to by industry. Communicating the value that expanded access to data can provide in helping brands service the needs for all in society will be an influential incentive to drive consumer engagement with data sharing in the 2020s.

US consumers show a willingness to share personal data to drive the competitiveness of smaller businesses, particularly younger age groups

Just over 4 in 10 US consumers (43%) claim that they would be more likely to share personal information in order to provide a competitive advantage to smaller companies over larger ones. While agreement does increase above 1 in 2 among those aged 25-34 (57%) and 35 to 44 (60%), such figures fall to less than 1 in 2 (18%) among the 65+.

“I don’t mind sharing personal information with smaller companies if it helps give them a competitive advantage over larger companies”

How much do you agree or disagree with the following statements? | % who agree



The role that data sharing can play in driving more competitive economies will be a compelling factor to encourage parts of the US consumer landscape, particular across younger age groups, to engage with data exchange in the 2020s.

METHODOLOGY

In December 2021, Foresight Factory conducted, on behalf of the ANA and Acxiom, an online survey of 2,038 respondents exploring public attitudes toward privacy in the US. Unless referenced, all data included in this report is taken from this survey. For this research, Foresight Factory set interlocking nationally representative quotas on age, gender, and region. This ensured the sample was representative of the US population. Weighting was also applied to further ensure a nationally representative sample. The analysis of the data, and the segmentation of findings was conducted in-house by Foresight Factory's quantitative analysis team.

ABOUT ACXIOM

Acxiom is a customer intelligence company that provides data-driven solutions to enable the world's best marketers to better understand their customers to create better experiences and business growth. A leader in customer data management, identity, and the ethical use of data for more than 50 years, Acxiom now helps thousands of clients and partners around the globe work together to create millions of better customer experiences, every day. Acxiom is a registered trademark of Acxiom LLC and is part of The Interpublic Group of Companies, Inc. (IPG).

For more information, visit [acxiom.com](https://www.acxiom.com)



ABOUT THE GDMA

GDMA is an organisation that represents, supports and unites marketing associations from around the globe that focus on data-driven marketing. It promotes worldwide initiatives aimed at providing marketers with global trend information, thought leadership and know-how on data-driven marketing across all sectors, disciplines and channels. Twenty-eight marketing associations are currently part of GDMA and more countries will join as their marketing associations begin to undertake the data-driven marketing remit. Collectively, they represent a significant proportion of the world's major brands, corporations, suppliers and agencies. Through its members' associations, GDMA provides access to the world's largest network of data-driven marketing organisations and influencers.

For more information, visit globaldma.com



Asia-Pacific

- ADMA (Australia)
- DDA (Hong Kong)
- DMAA (India)
- DMAS (Singapore)
- DMJ (Japan)
- MA (New Zealand)
- TDMA (Thailand)

Europe

- ANFO (Norway)
- BAM (Belgium)
- CMA (Hungary)
- DDMA (Denmark)
- DDMA (The Netherlands)
- DDV (Germany)
- DMA (United Kingdom)
- DMA France (France)
- DMA Italia (Italy)
- FEDMA (Europe)
- ICEMD (Spain)
- SWEDMA (Sweden)

Middle East & Africa

- DMASA (South Africa)
- DPID (Turkey)
- MENA (Middle East)

North America

- ANA (United States)
- CMA (Canada)
- Directa (Mexico)

South America

- ABEMD (Brazil)
- AMD (Chile)
- DMA Argentina (Argentina)

ABOUT FORESIGHT FACTORY

Foresight Factory is a leading international consumer futures business. Our core expertise is based on identifying and forecasting social and consumer trends and determining the extent of their impacts on markets, services, brands and products. Since our launch in 1996, we have worked to meet the strategic needs of businesses through the application of insight. We identify, measure and examine trends, attitudes and behaviours through the rigorous analysis of quantitative and qualitative research. Our robust programme of research provides businesses with the grounding and confidence to anticipate the likely impact of the evolving consumer environment and identify new market and revenue opportunities.

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