



Consumer Data Privacy Concerns

Commissioned by the Internet Innovation Alliance

July 2019





I-PROJECT BACKGROUND AND METHODOLOGY OVERVIEW

Introduction and Project Objectives

CivicScience was enlisted by the Internet Innovation Alliance (IIA) in March of 2019 to conduct an objective, large-scale study of U.S. consumers and their concerns over financial and personal data being hacked; online data being used for more relevant content / advertising and also for commercial purposes; and the need for a single, national policy addressing consumer data privacy. CivicScience developed a list of questions and sampling approach to achieve a high-confidence, representative view of the online U.S. adult population, with sufficient sample sizes to ensure statistically-significant cross-tabulation by key demographic and geographic attributes. Particular emphasis was placed on the study of Millennial respondents and changing attitudes by age and life-stage cohort. Data contained in this report reflect consumer responses from March 18, 2019 to April 6, 2019.

Summary Findings

It's rare to find a topic on which the vast majority of Americans agree, let alone when it's a question of national policy, yet current public opinion on data privacy issues is remarkably aligned. There are some, mostly generational, differences in the degree to which people are apprehensive about the issues studied in this report, but there is no question the concerns are shared among all walks of life.

Use of personal data as a means to deliver more relevant content and advertising is perhaps the best example of an issue on which there are differences between demographic segments but definite overall agreement. More than two-thirds (69%) of Millennials disagree with these practices, and this increases to a remarkable 79% among Americans aged 55 or older.

Similarly, more than half (56%) of Hispanic adults express concern about how tech / social media companies are using their online data and location information for commercial purposes, and this jumps to over three-quarters among US adults of other races. Despite varying levels of concern across race and ethnicity, overall concern remains high.



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About CivicScience

CivicScience is a polling and data analytics company, founded in 2007 and based in Pittsburgh, Pennsylvania. The company combines a proven web-based survey technique to achieve large, representative samples of the U.S. population, with a proprietary database technology to perform sophisticated computations and insight discovery within the company's large respondent dataset.

CivicScience provides syndicated and custom data, software, and related services to an array of private sector and non-profit customers, across numerous industries and fields of science. CivicScience is expressly non-partisan and otherwise unaffiliated with any organizations or political entities which would influence research design, analysis, or recommendations.

About the Methodology

CivicScience administers a daily syndicated and custom 'omnibus' tracking survey, delivered to respondents in small increments over a large and diverse network of 1st-party and 3rd-party web and mobile applications. Individual sessions are brief, convenient, and engaging for the respondents – as compared to traditional, long-form telephone and online panel surveys. As a result, CivicScience overcomes declining response rates, which have plagued traditional survey methodologies in recent years, particularly among notoriously-hard-to-reach subpopulations like Millennials and minorities.

CivicScience respondents participate voluntarily, in order to see results and/or to voice their opinion, with no financial or other extrinsic reward. This voluntary, non-compensated participation significantly reduces known respondent biases associated with reward-based panels or paid survey modes.

Although respondents only answer a small number of randomized questions in a given session, CivicScience attaches subsequent responses to a unique, anonymous digital identifier to track respondents longitudinally, build respondent profiles, and enable Cross-tabulation. All respondent attributes, including demographics, are directly reported via survey responses, except for geo-location, which is ascertained via Internet Protocol (IP) Address look-up.

(A more detailed explanation of CivicScience's methodology, including links to related white papers, independent assessment, and scientific references can be accessed [here](#)).



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About This Study

To achieve the project objectives, CivicScience designed a four-question survey delivered in one-question increments to a random quota-based sample of a minimum of 8,000 online U.S. adult respondents aged 18 and older. Quotas were established to build a respondent population matched precisely to the full U.S. population based on 2010 U.S. Census statistics for age, gender, and U.S. region. For the key demographic subpopulations (*/**) analyzed in this report, CivicScience performed basic and minimal reweighting to ensure precise alignment with Census norms. All questions and samples produced a margin of error of less than +/- 1%.

Note 1: Cross-tabulation Sample Sizes*

Due to the nature of the CivicScience collection methodology, not all attributes are known about every respondent in our sample at any given time. For example, some respondents may have encountered our question about financial information being hacked prior to having answered profile questions about their residential area. For the purposes of this study, cross-tabulation tables only included respondents who had answered those key demographic questions AND the project research questions, within the study timeframe. As such, Cross-tab sample sizes for the Income, Urbanicity and Parental Status question are smaller than our top-line samples, but still statistically-significant in scale and representativeness.

*Note 2**: Cross-tabulations Analyzed*

CivicScience maintains extensive demographic and psychographic profiles of the respondents who have answered our survey questions over time. For the purposes of this report, we focused the analysis on the following subpopulations – Age, Gender, Income, Race, Urbanicity, and Parental Status.

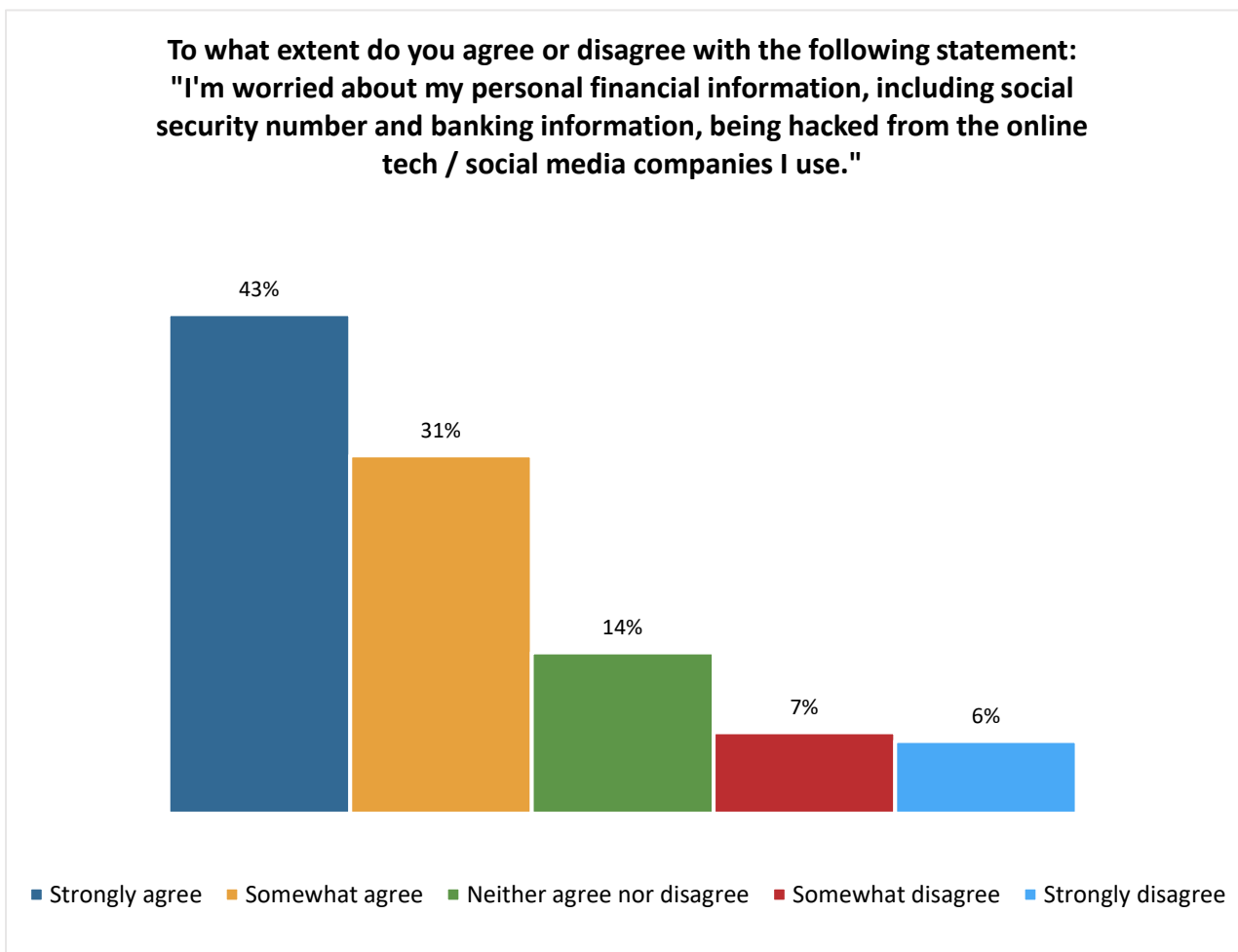


II- TOPLINE RESULTS AND KEY DEMOGRAPHIC CROSS-TABS

Question 1 (Concern About Personal Financial Data Being Hacked)

Topline Results

Three-quarters of all U.S. adults are worried about their personal financial information being hacked from the online tech / social media companies that they use.

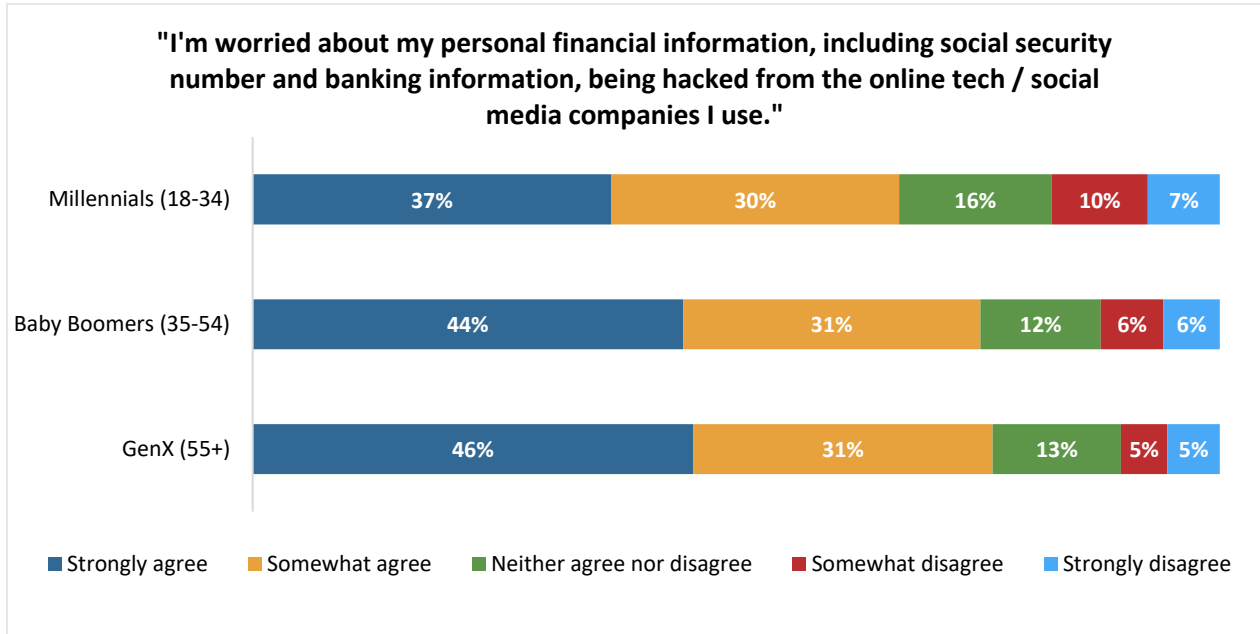




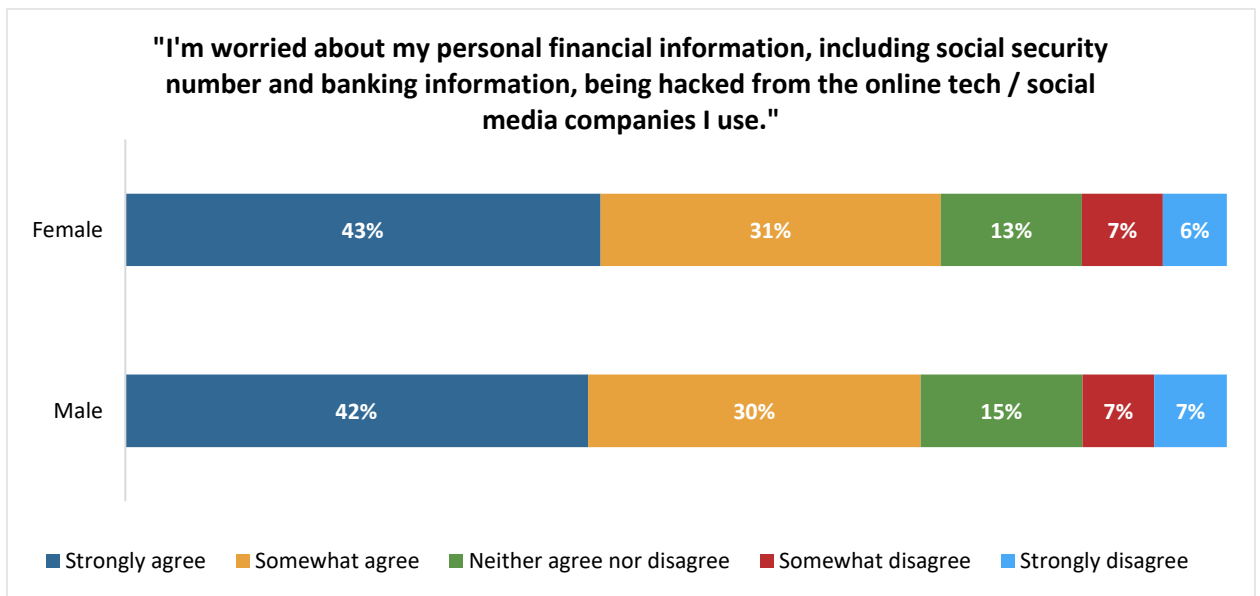
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Demographic Differences

Age: A strong majority of Millennials - two-thirds (67%) - are worried about their personal financial information being hacked from the online / social media companies they use. An even larger percentage of older generations are worried about their information being hacked.



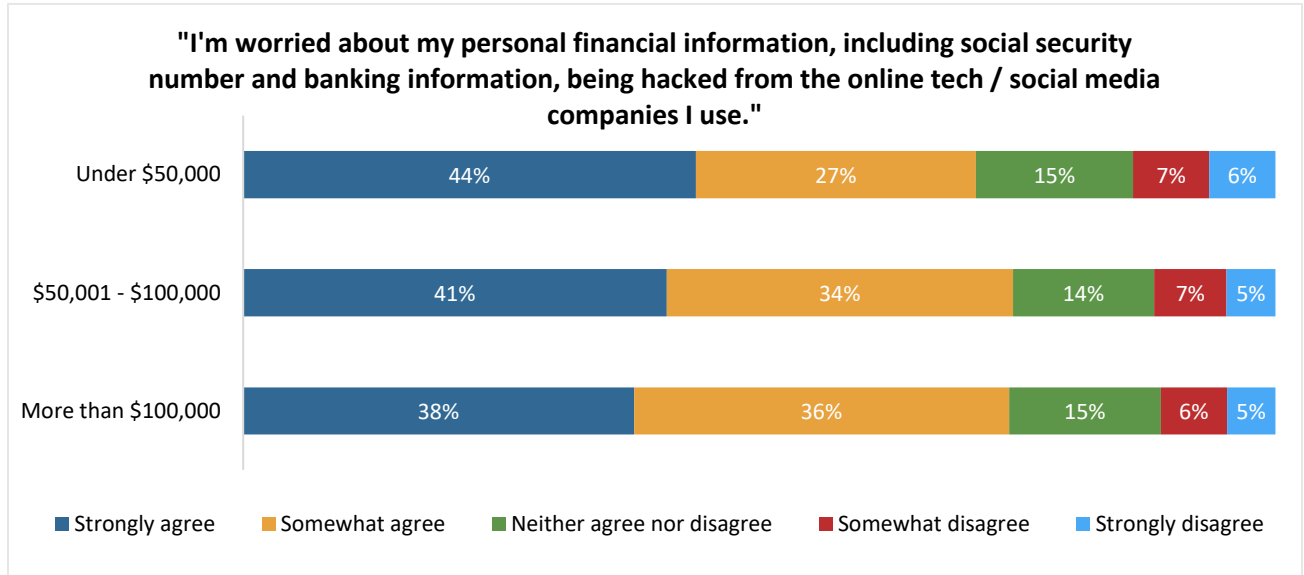
Gender: There are no significant differences seen by gender.



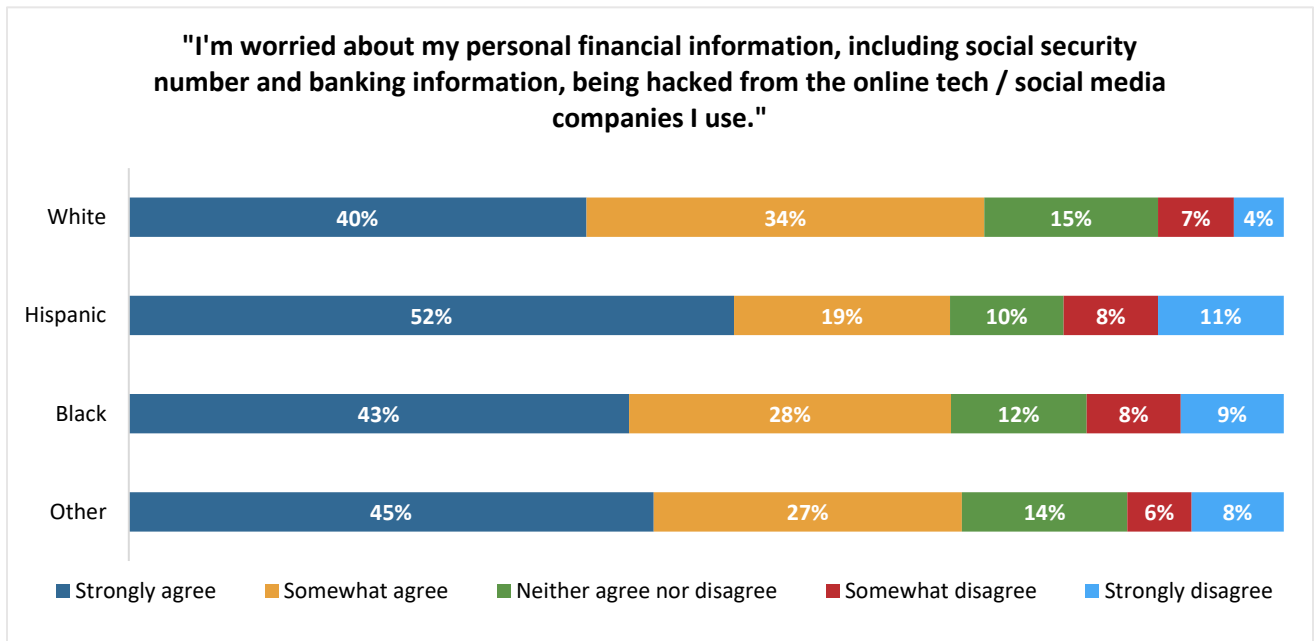


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Income: Adults with income below \$50,000 are the most likely to *strongly* agree that they are worried about their personal financial information being hacked compared to adults with income above \$50,000.



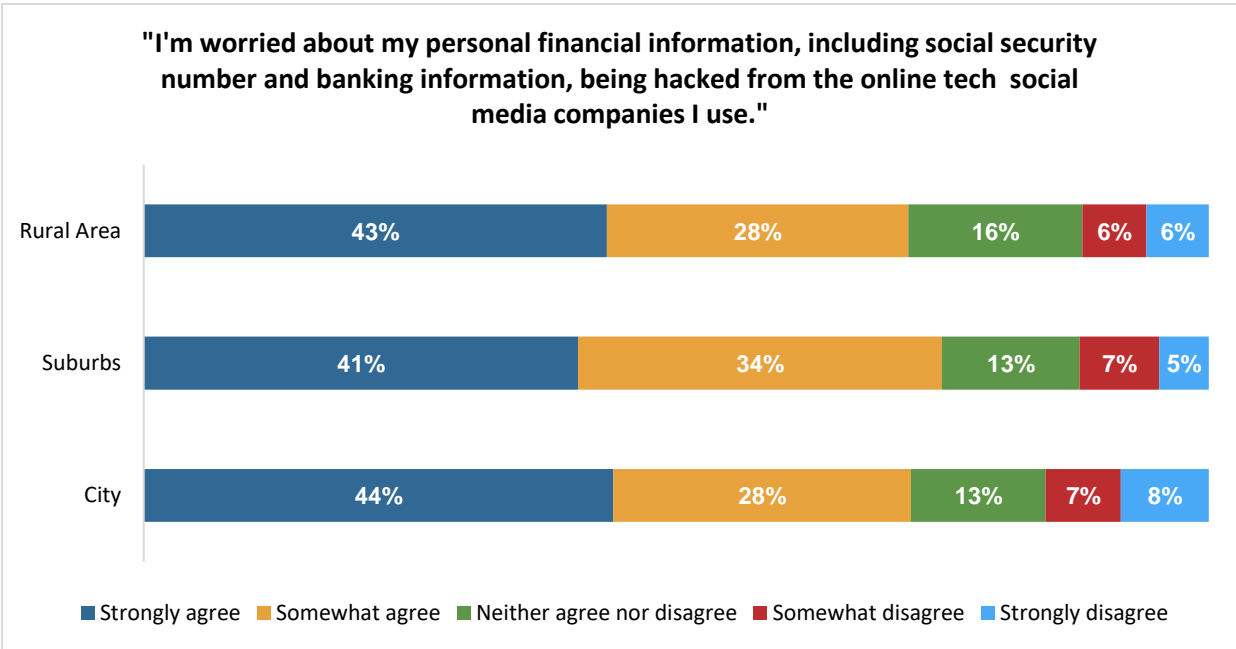
Race: Concern about personal financial information being hacked is similar across all races; however, Hispanic adults are significantly more likely to *strongly* agree that they are worried about their personal financial information being hacked from the online companies they use.





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Urbanicity: Adults living in the suburbs are slightly more likely to be worried about their personal financial information being hacked.



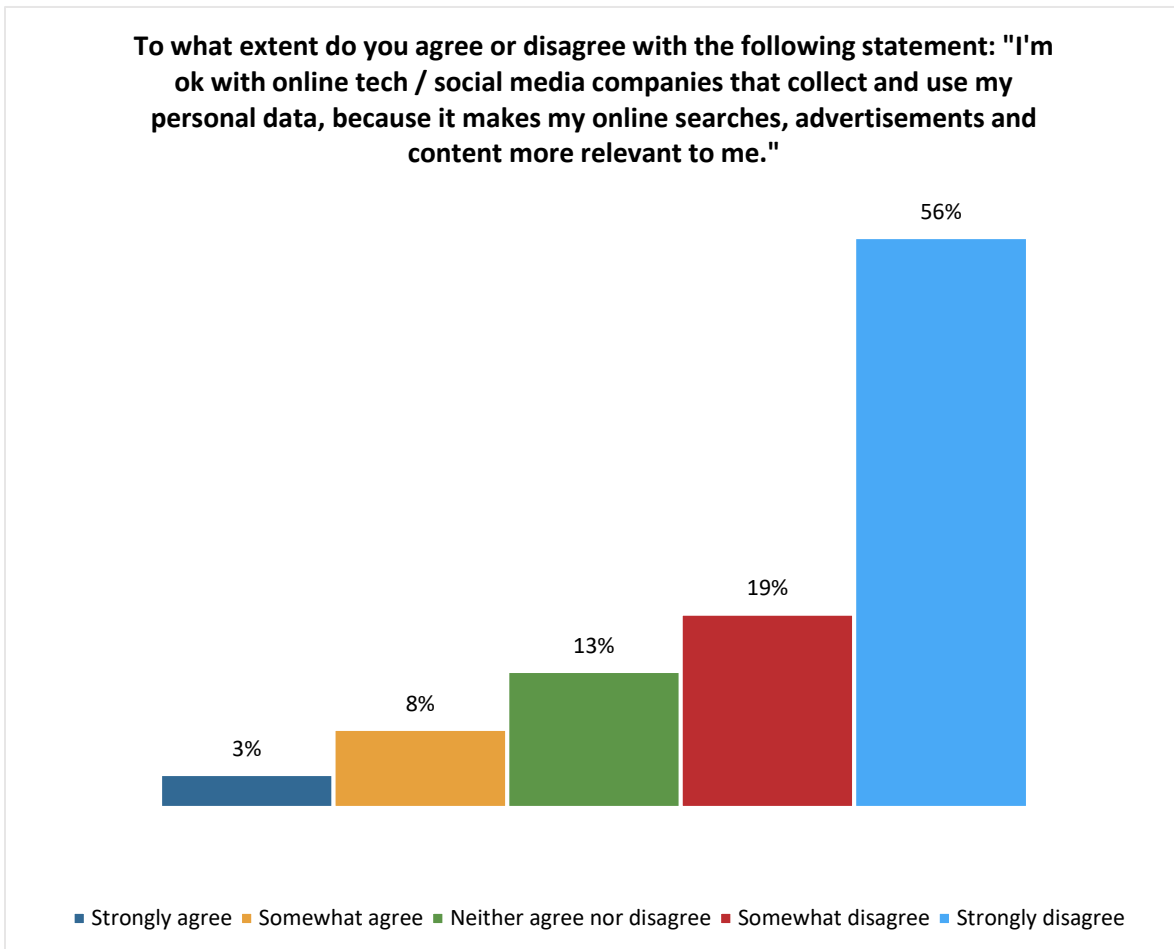


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Question 2 (Personal Data Being Used for More Relevant Online Content & Advertising)

Topline Results

Three-quarters of U.S. Adults are **not** ok with online tech / social media companies using their personal data although it makes online searches, content & advertisements more relevant.

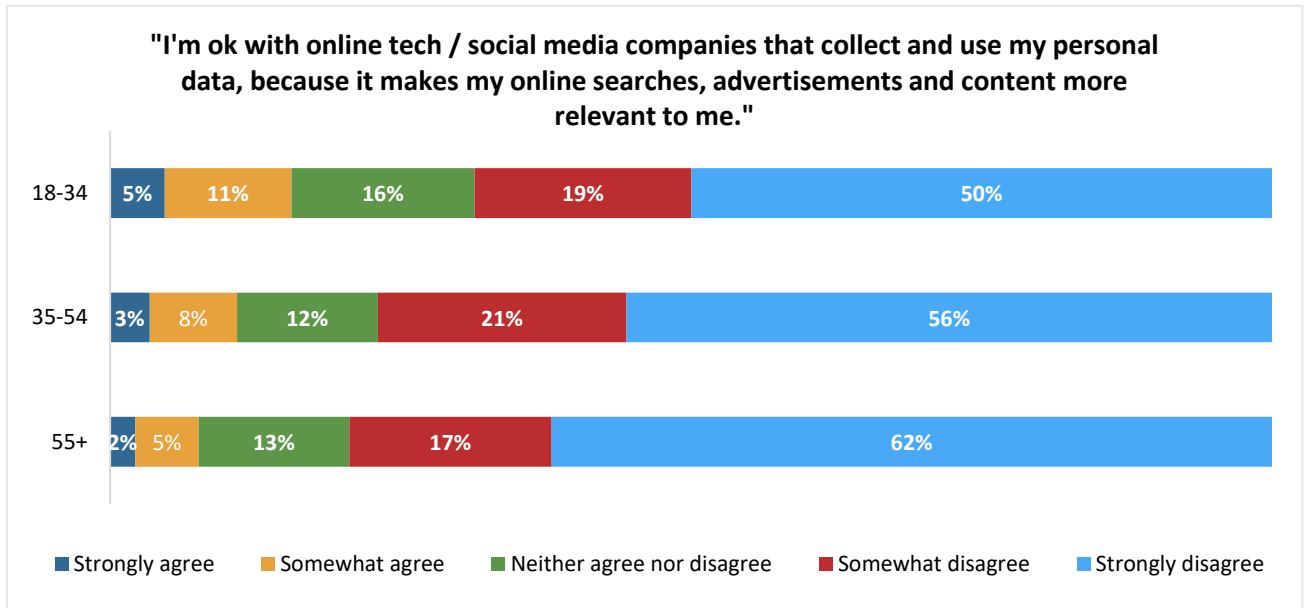




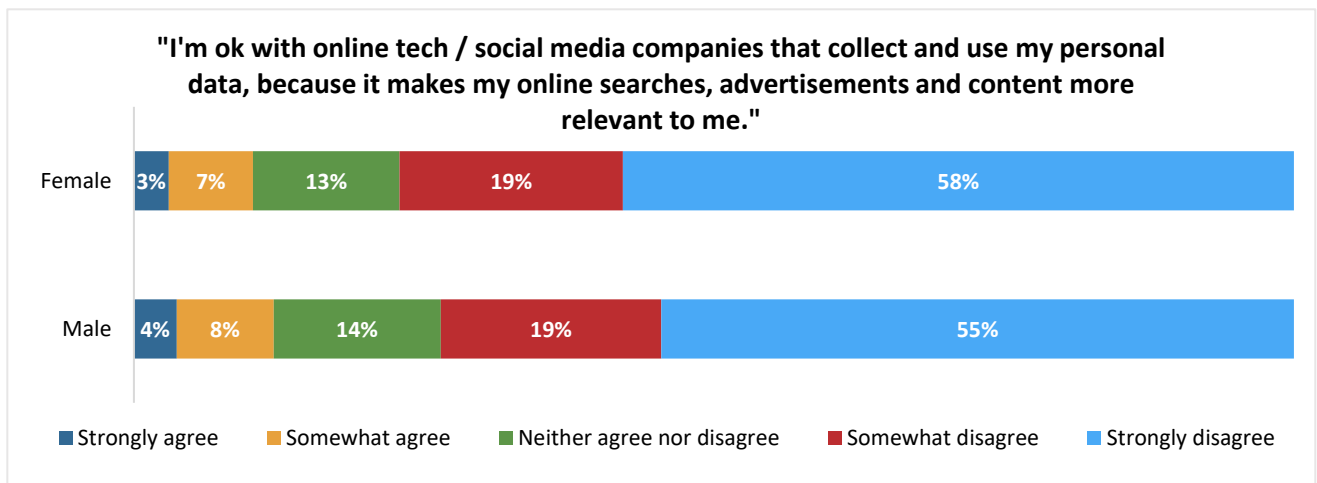
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Demographic Results

Age: More than two-thirds (69%) of Millennials are not okay with their online data being collected and used even if it makes online searches, advertisements and content more relevant. An even larger percentage of older adults are not ok with their data being collected and used for more relevant online experiences.



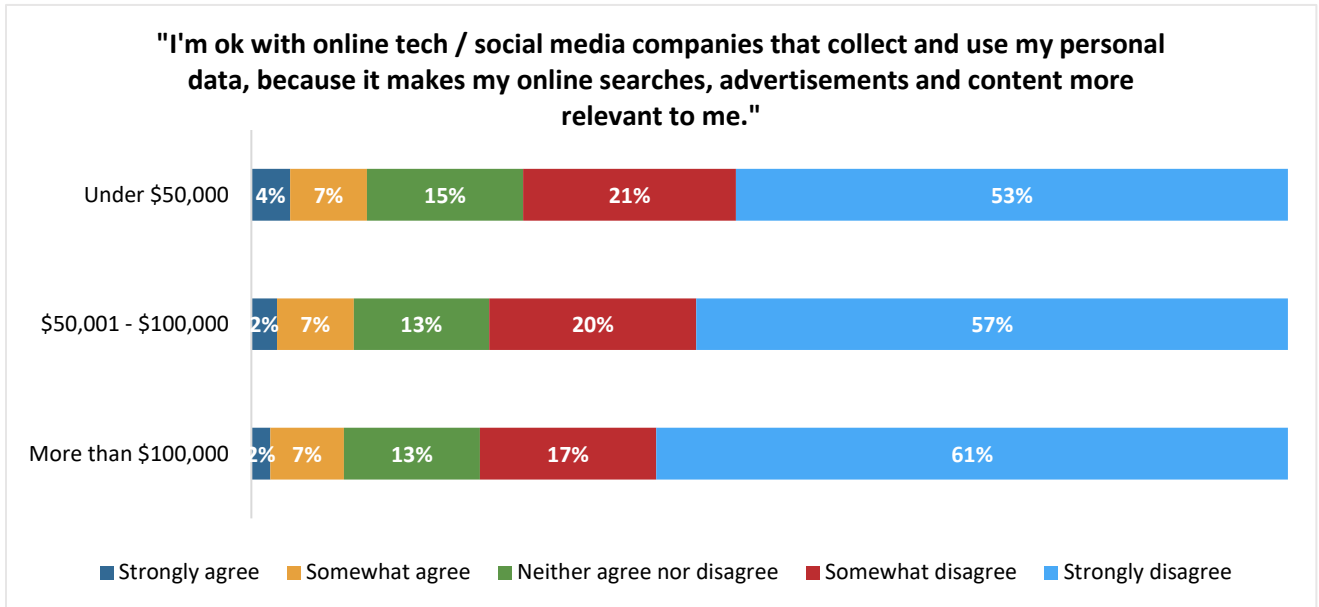
Gender: More than three-fourths of women, and nearly three-fourths of men, are not ok with their online data being collected and used even though it provides them with a more relevant online searches, advertisements and content.



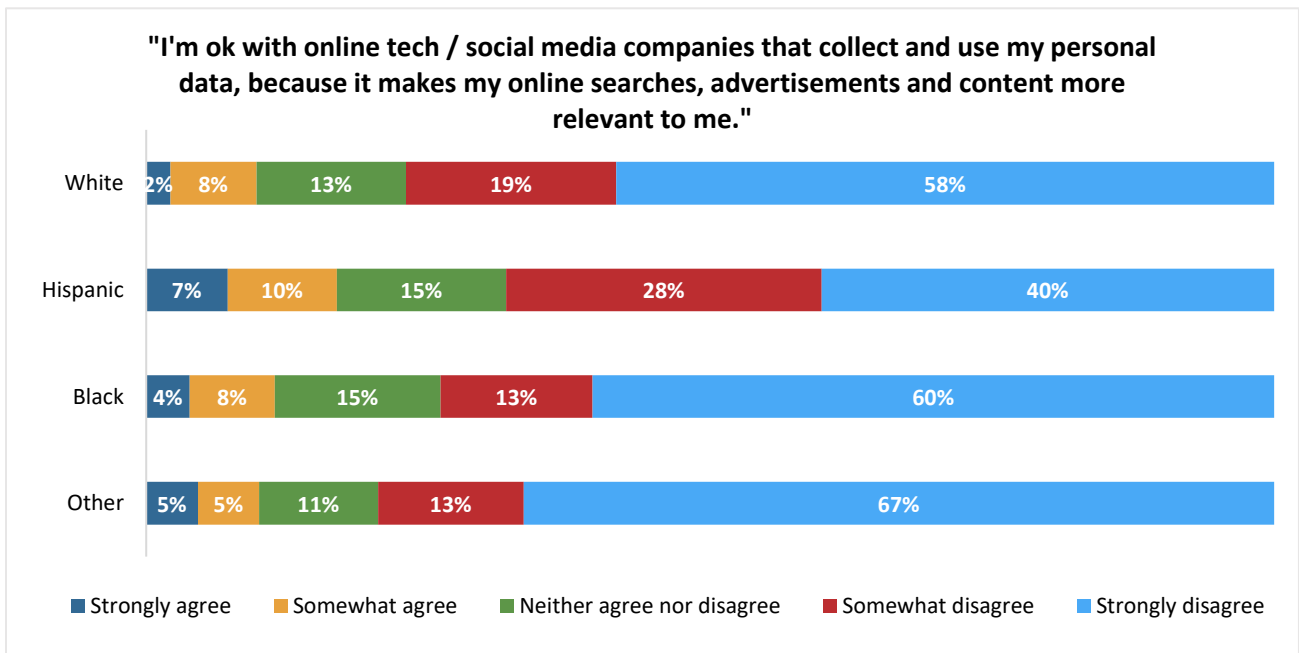


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Income: U.S. adults of all income levels report that they are not OK with tech/social media companies collecting their personal data to make content more relevant to them.



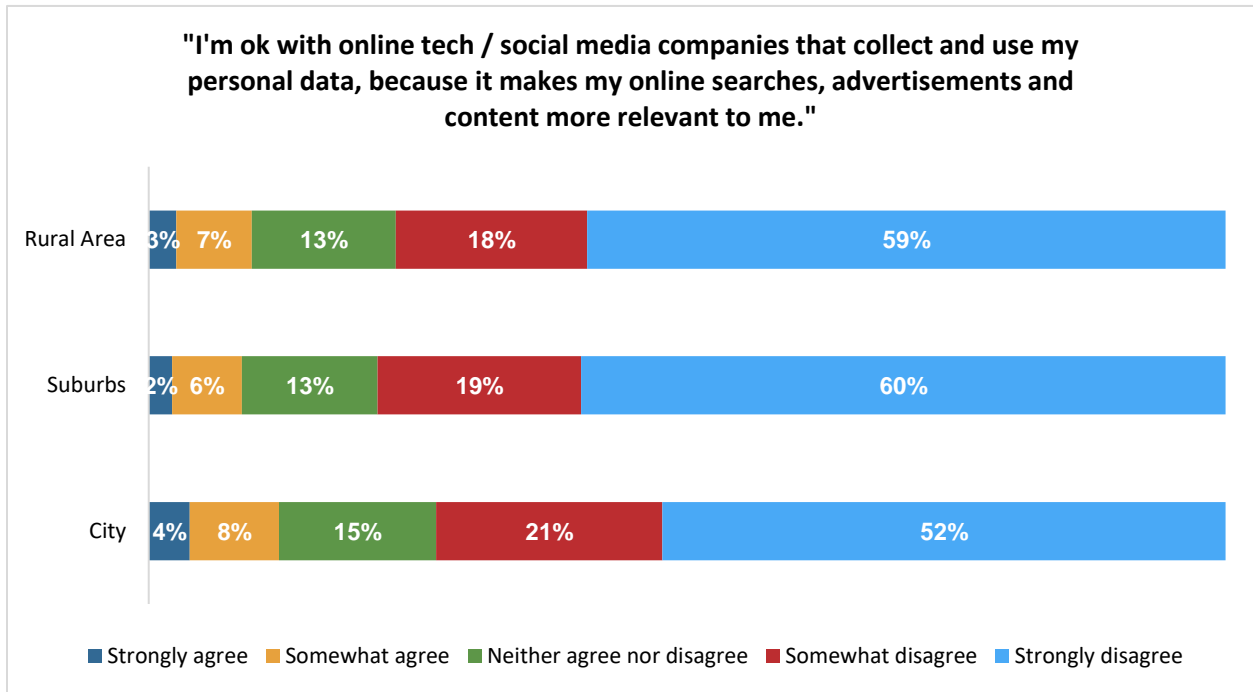
Race: Two-thirds of Hispanic adults are not okay with companies collecting their personal information for more relevant content, while even more (three-quarters) white, black and other adults are not okay with this level of data collection.





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Urbanicity: City dwellers are slightly more likely to be okay with online companies collecting their personal data for more relevant experiences; consumers living in the suburbs appear to be the most concerned about this, followed closely by those who live in a rural area.



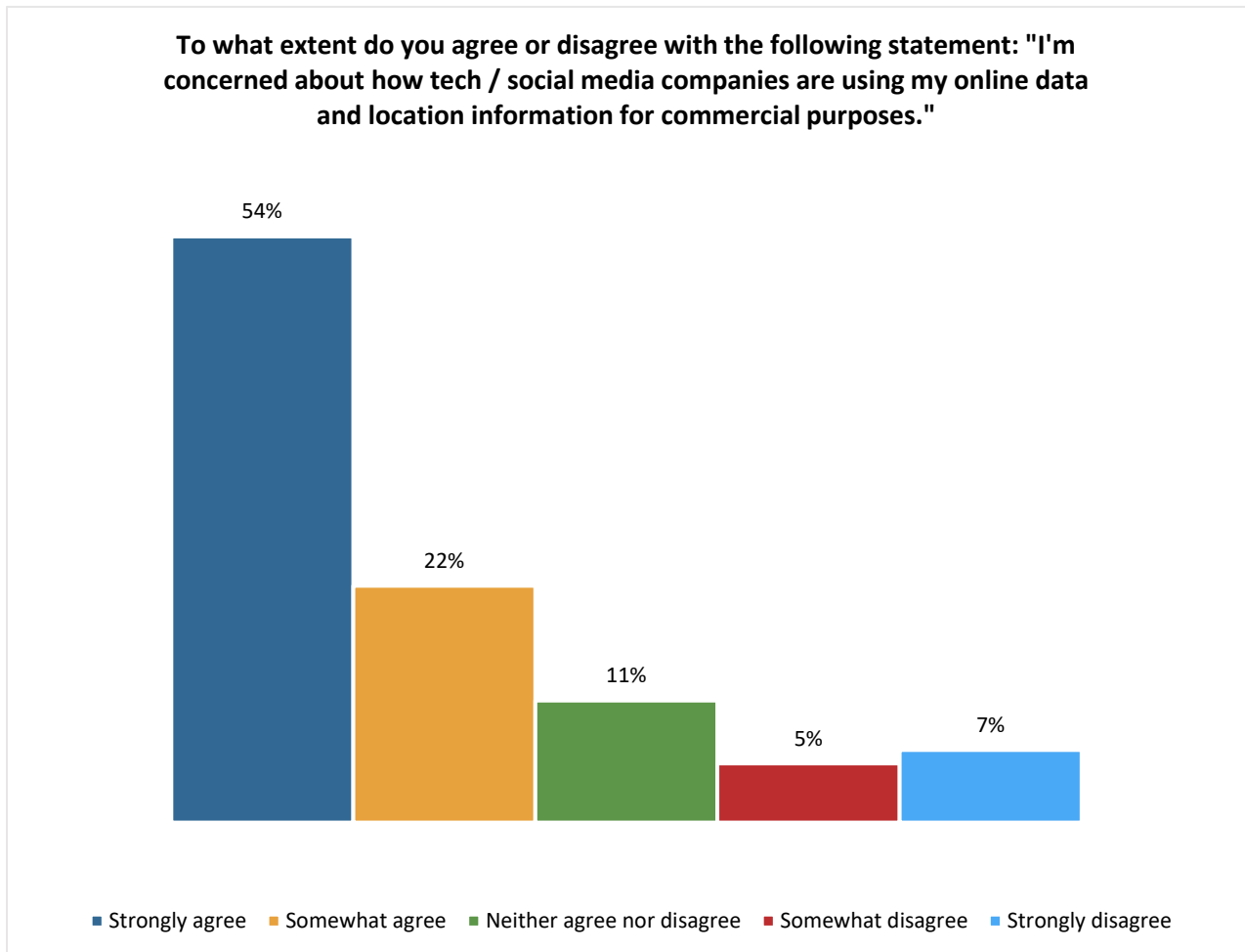


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Question 3 (Concern with Online / Location Data Being Used Commercially)

Topline Results

More than three-quarters (76%) of all U.S. adults are concerned with their online and location data being used for commercial purposes; more than half (54%) *strongly agree* with this statement.

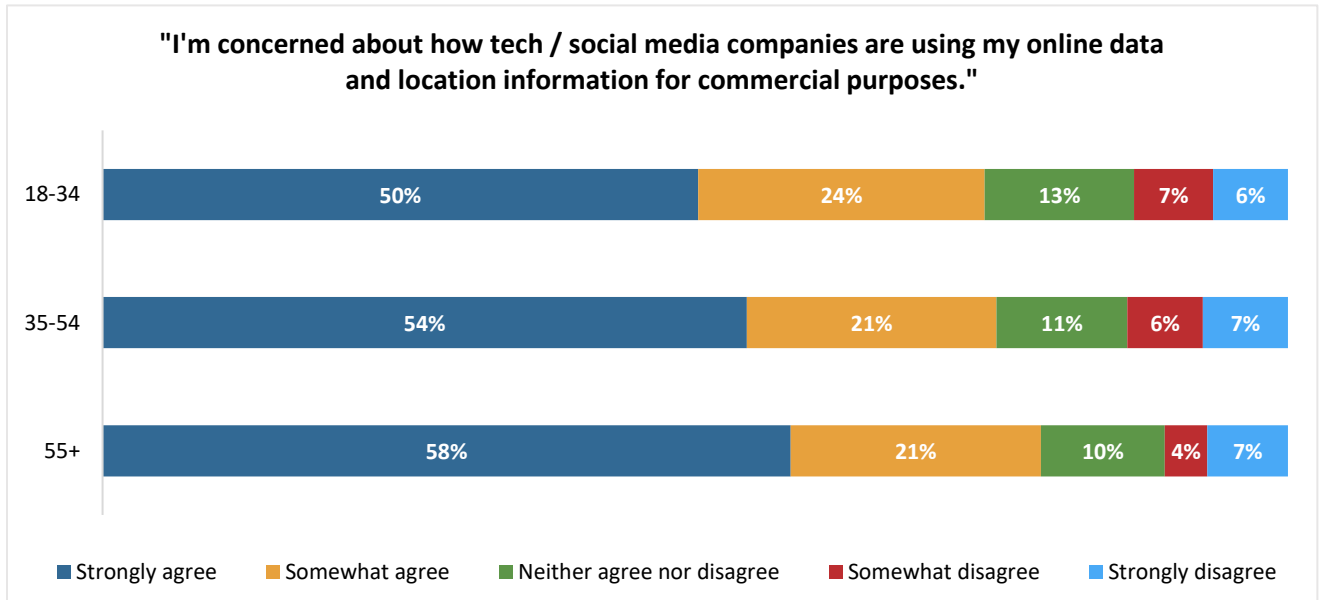




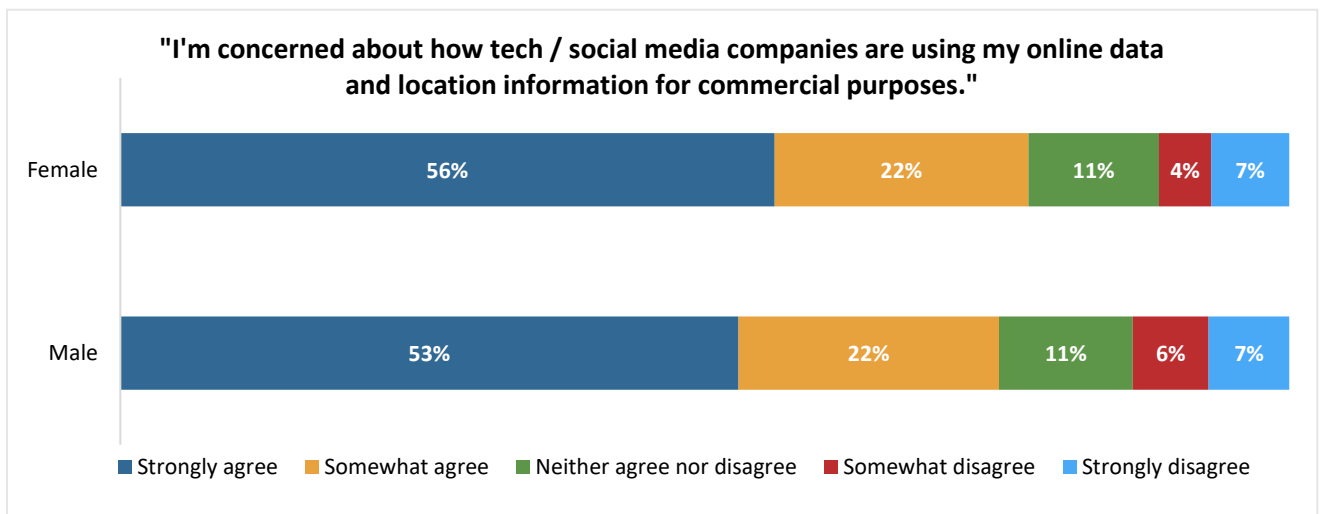
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Demographic Results

Age: A very strong majority - nearly three-quarters (74%) - of Millennials are concerned with how tech/social media companies are using their online data and location information. An even larger percentage of older Americans are concerned.



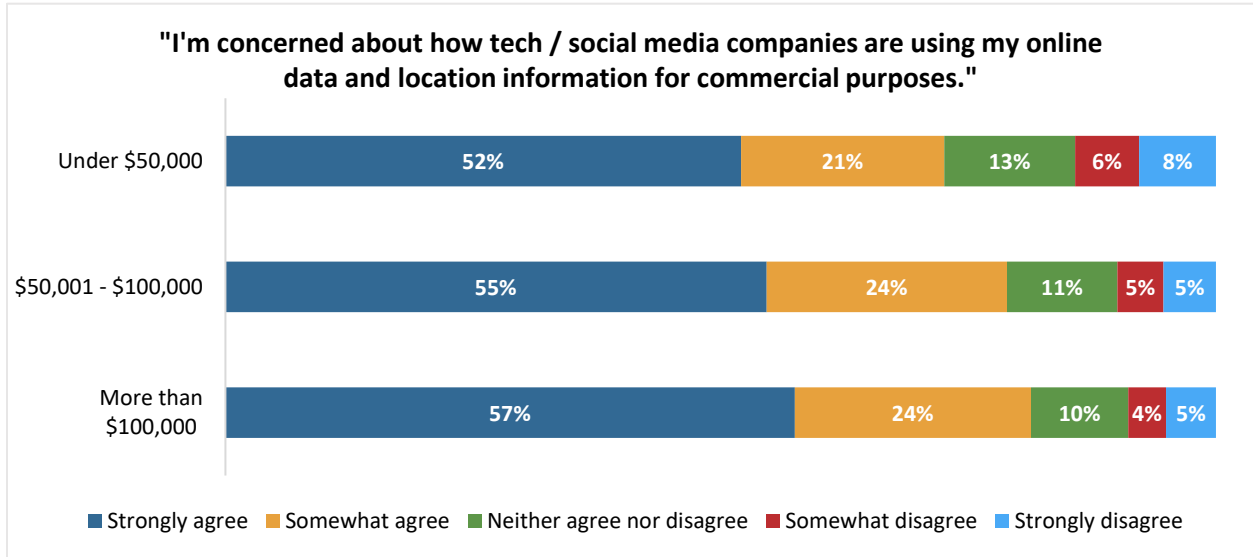
Gender: Females are slightly more likely to be concerned about their online data being used for commercial purposes.



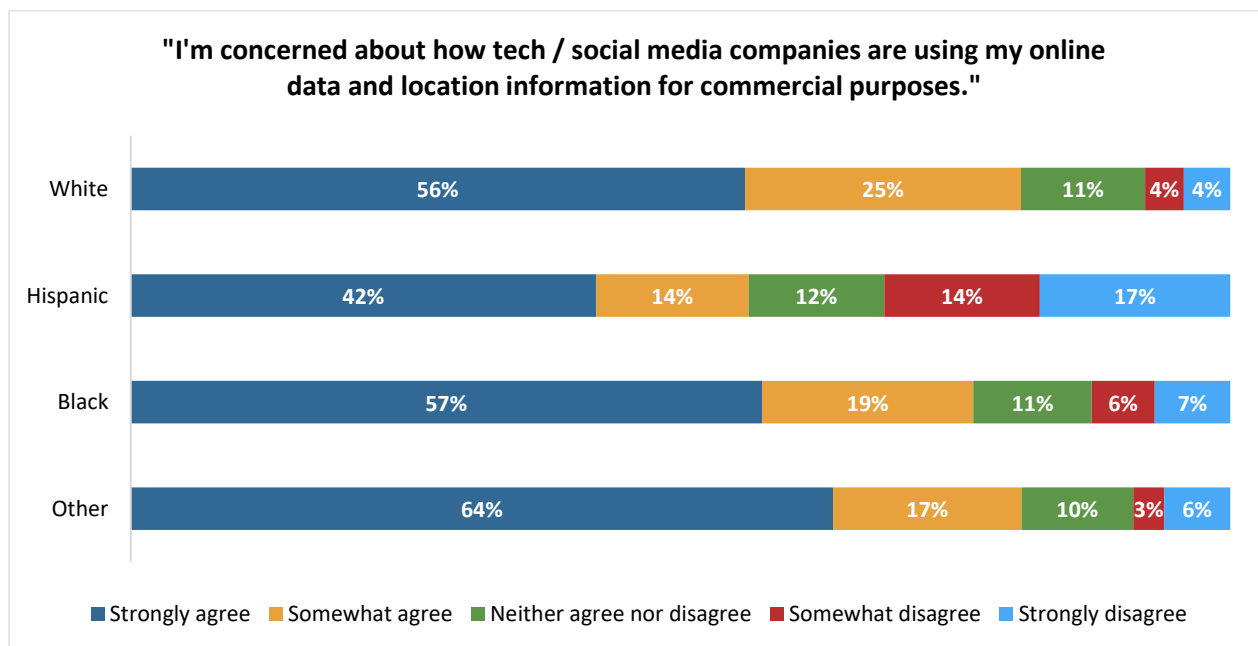


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Income: The higher the household income, the more concerned consumers are about their online data and location information being used for commercial purposes.



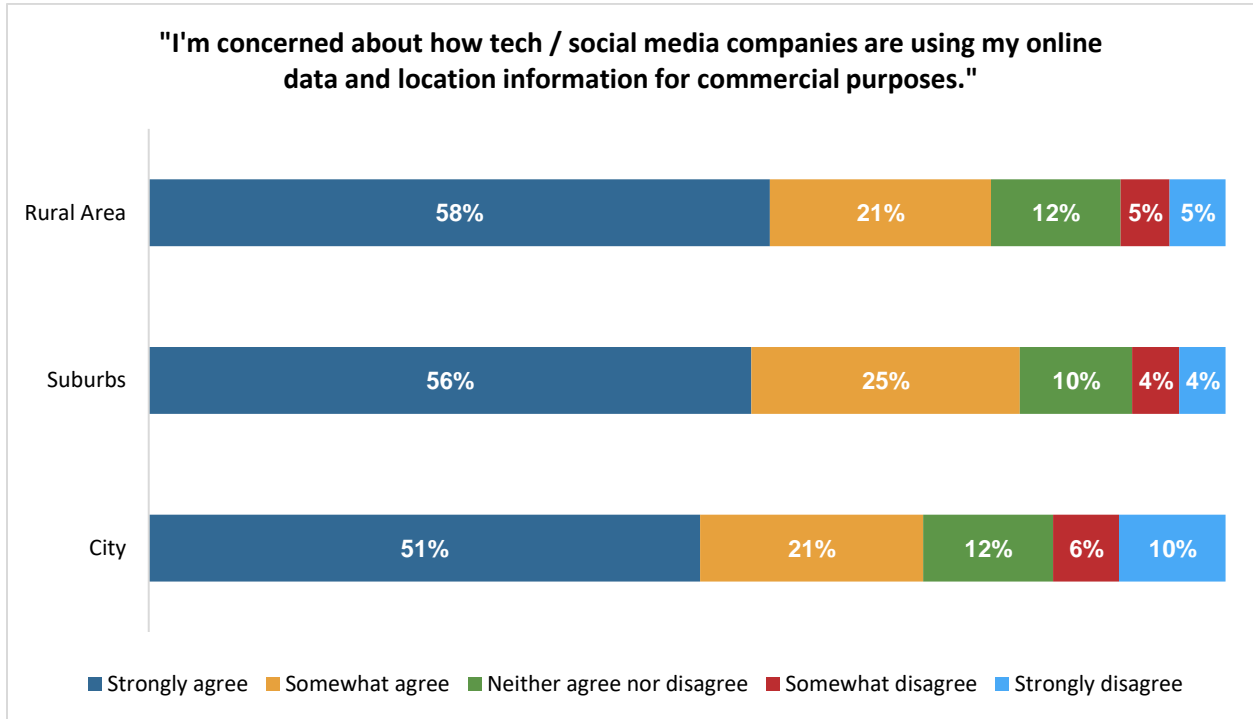
Race: More than half (56%) of Hispanic adults are concerned with how tech / social media companies are using their online data and location information for commercial purposes, and this percentage is even higher among other races; White (81%), Other (81%), Black (76%).





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Urbanicity: U.S. adults living in the city are less likely to be concerned with their data being used for commercial purposes.



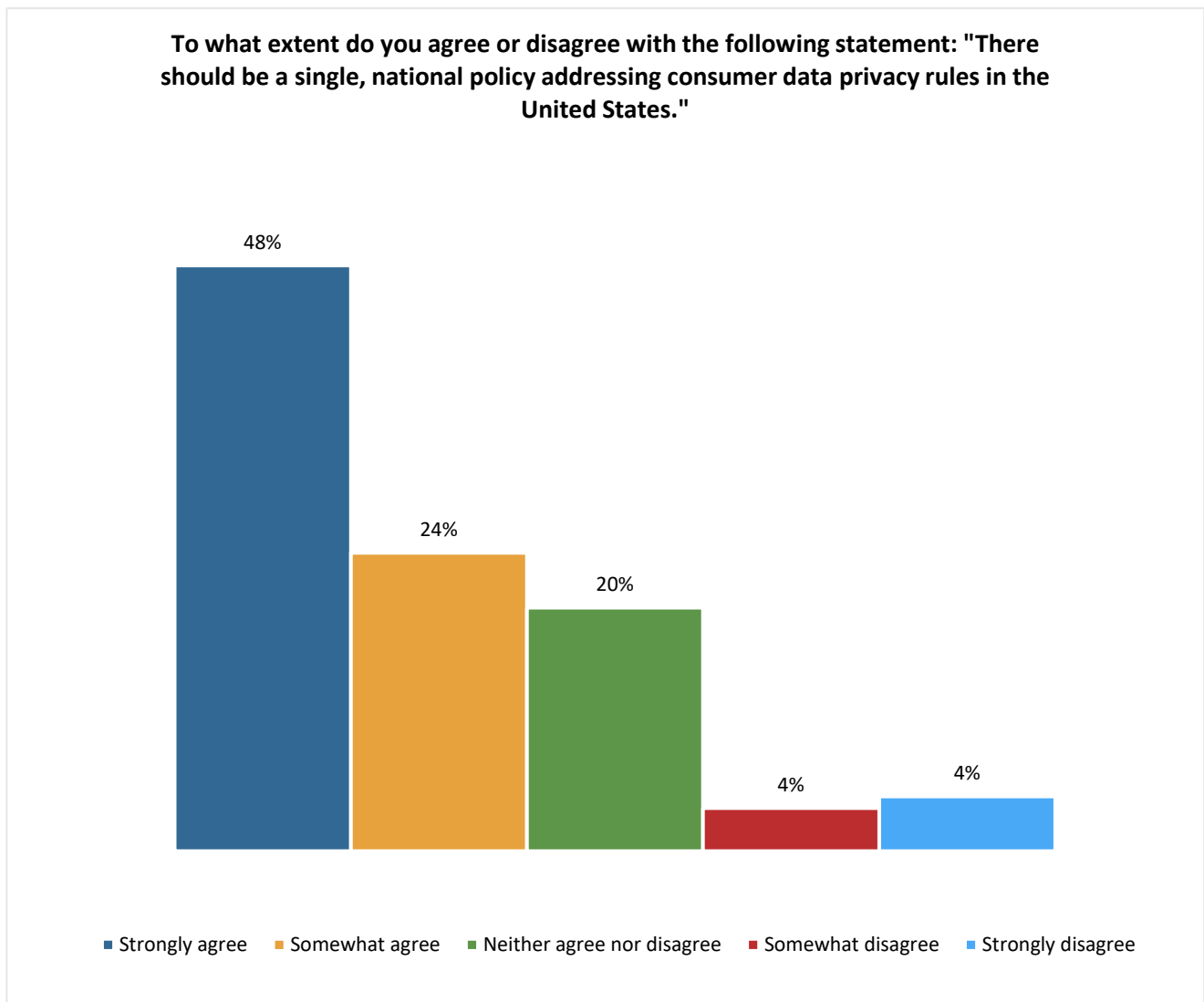


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Question 4 (National Data Privacy Policy)

Topline Results

The overwhelming majority of U.S. adults agree (strongly & somewhat) that there should be a single, national policy addressing consumer data privacy rules in the United States. Half (48%) of consumers *strongly agree* with this statement.

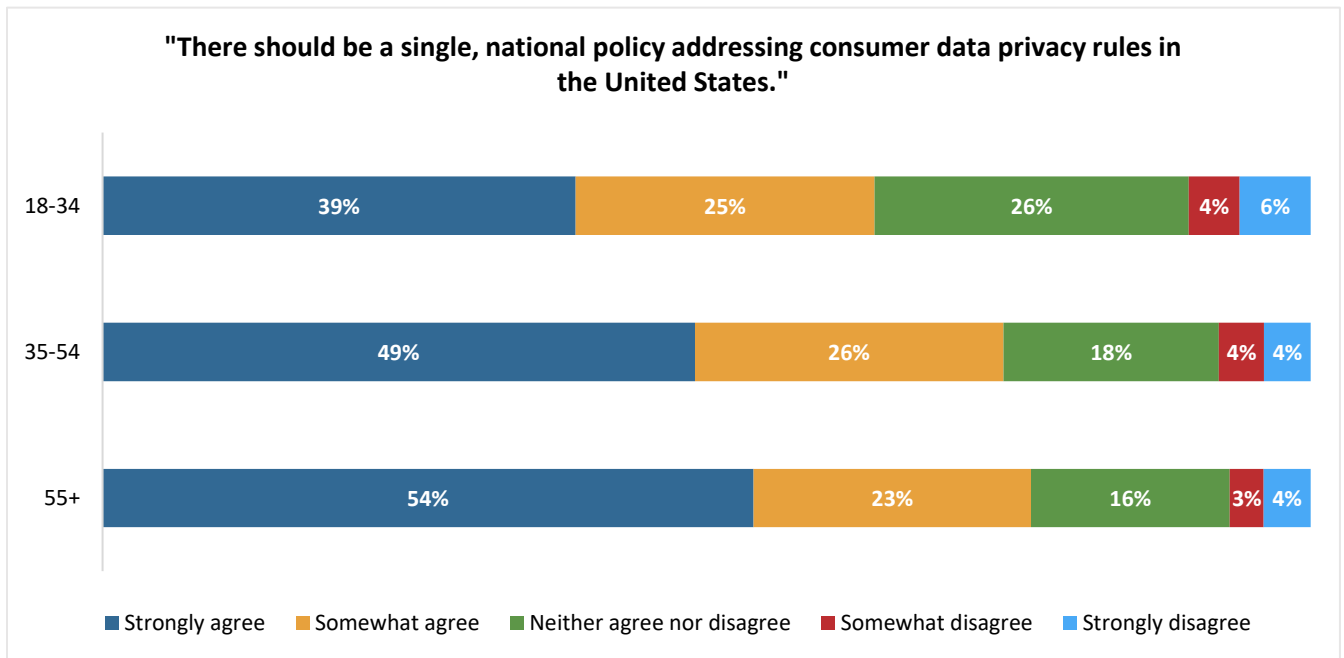




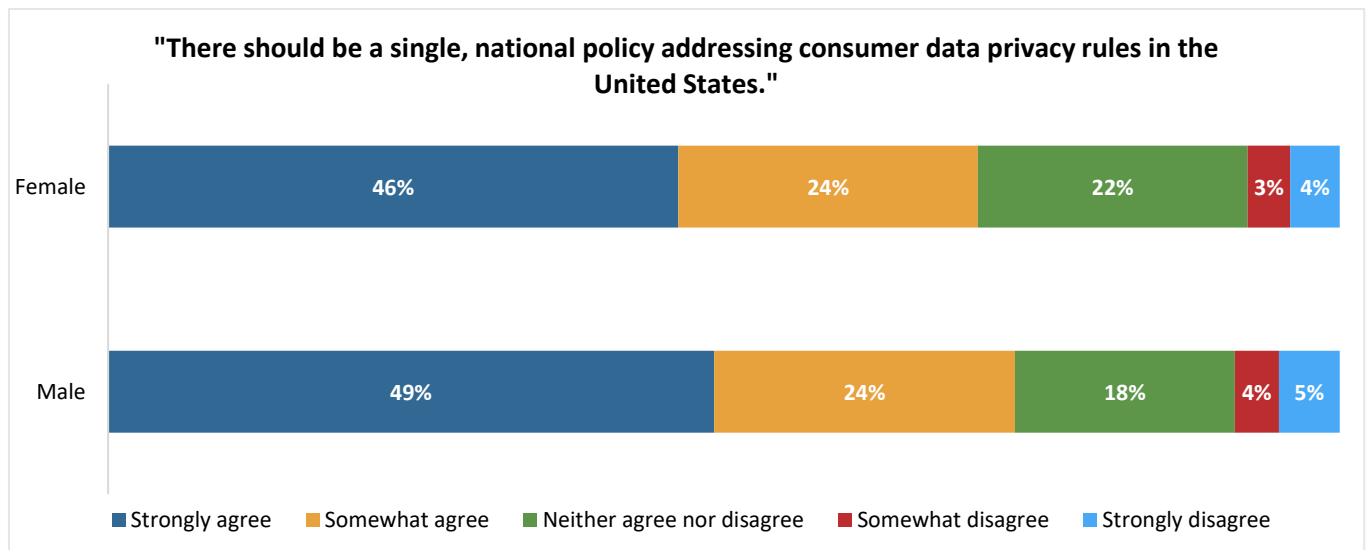
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Demographic Results

Age: The majority of Millennials (64%) believe a single, nationwide data privacy law is necessary, while an even larger percent of older adults (75% 35-54, 77% 55+) think so, too.



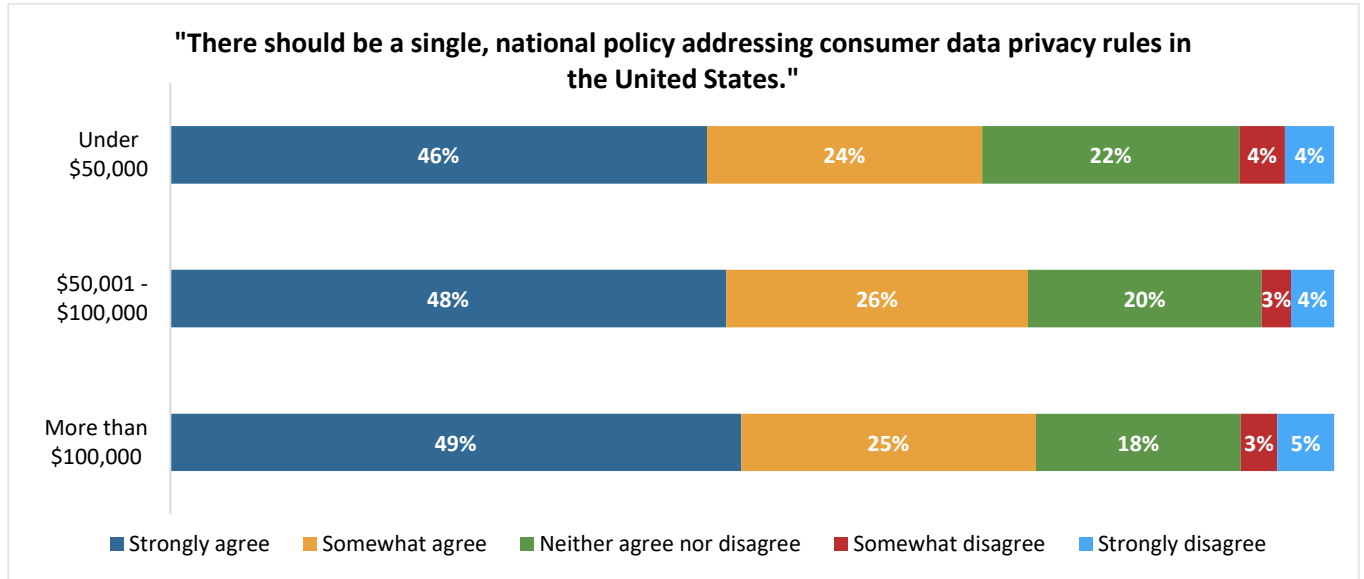
Gender: Men are slightly more likely to agree that there should be a single, national consumer data privacy policy in the U.S; however, more than two-thirds of women feel the same way.



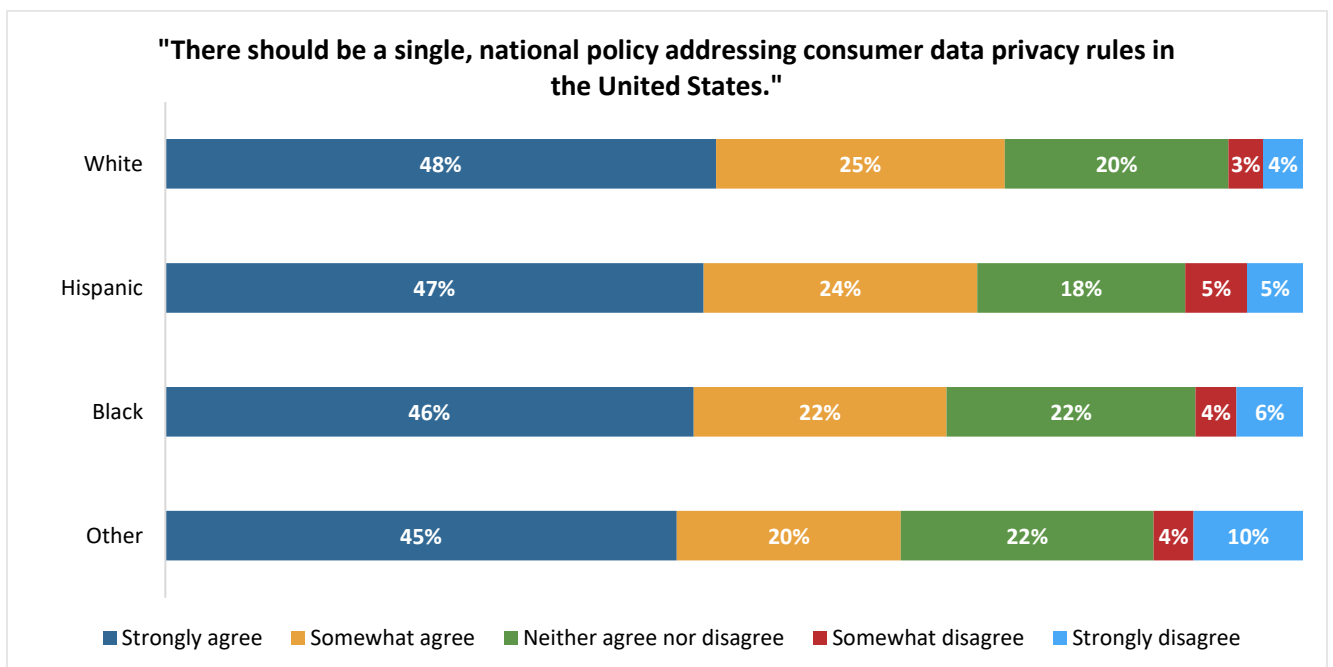


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Income: There are not significant differences across income levels, however, more affluent adults are *slightly* more likely to agree that a single, national policy is needed in the U.S.



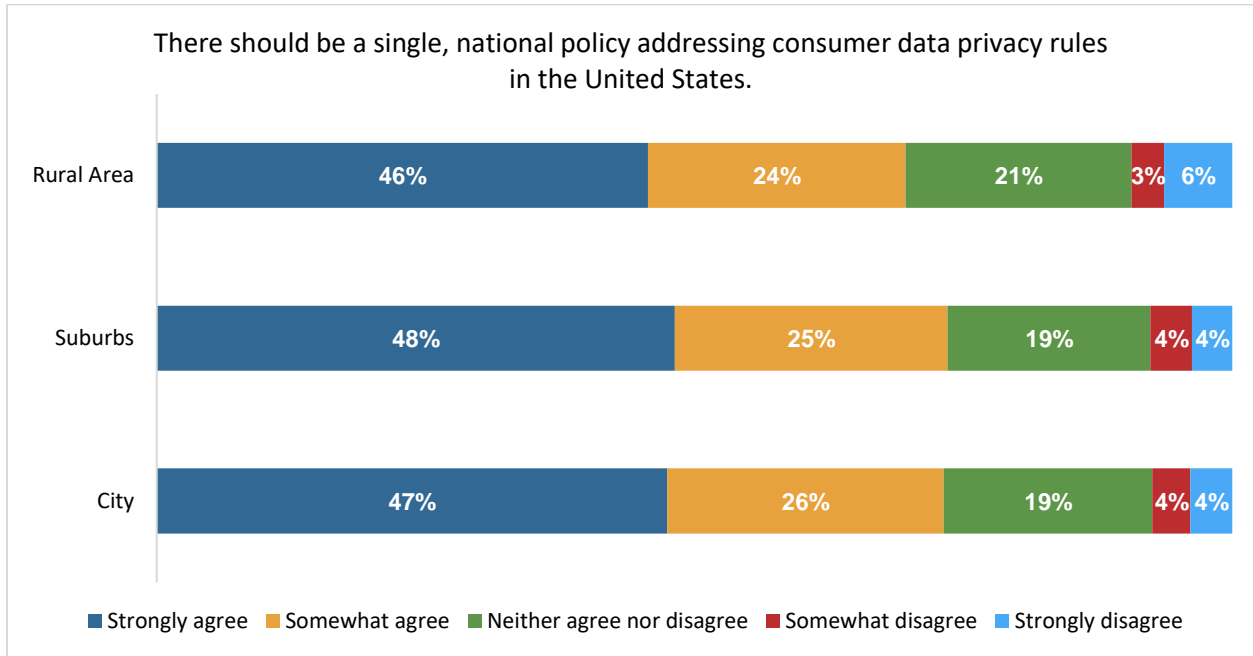
Race: Consumers of all races believe that there should be a single, national policy addressing data privacy rules. This is highest among white adults (73%), followed by Hispanic adults (71%), Black adults (68%) and other (65%).





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Urbanicity: Two-thirds of consumers living in the city, suburbs and rural area believe that a single, national policy addressing consumer privacy rules is needed in the U.S.





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III-CONCLUSION

Given the data collected here, it is unsurprising that there is overwhelming support for the idea of a single, national policy on consumer data privacy. Not only do a strong majority of Americans (72%) agree that such a policy should exist in the US, but the degree of difference in different demographic groups is low. The biggest difference in opinion is between age groups, but still a majority of Millennials (64%) agree it's necessary (with only 10% opposed). The number in favor of a policy solution tops out at over three-quarters among Americans over the age of 35 (with less than 10% opposed). Gender, income, race, and urbanicity have even less impact than age on this matter.

Americans, regardless of demography, believe there is reason for concern when it comes to personal data online, and they think a national policy should be implemented to address these issues.

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