“Perceptions of Privacy Online and in the Digitally Connected World”
Data Privacy Research Results Summary
Released January 28, 2015

About the Survey:
In 2013, the National Cyber Security Alliance convened a Privacy Messaging Development Committee (PMDC) comprised of 35+ civil-society, non-profits, government and industry with the mission to develop research based harmonized privacy messaging. Heart+Mind Strategies conducted the national survey online with 1,000 U.S. adults ages 18 and up between December 27, 2013-January 5, 2014. The poll was part of an extensive analysis on the perceptions of online privacy. Respondents for this survey were selected from among those who have volunteered to participate in online surveys and polls. Because the sample is based on those who initially self-selected for participation rather than a probability sample, no estimates of sampling error can be calculated. All sample surveys and polls may be subject to multiple sources of error, including, but not limited to sampling error, coverage error, and measurement error.

Key Findings:

84% of Americans feel “a lot” or a “tremendous amount” of responsibility to protect their personal information.

Yet, not knowing what information is being collected or how it is being used is a higher concern than losing a job or becoming a victim of crime for most Americans

The welfare of one’s information ranks highest among several issues facing the country today. Individuals feel more concerned about not knowing how their personal information is being collected or how it is being used than not being able to access or afford healthcare. It also ranks higher than concerns for protecting the environment, being attacked by an online predator or becoming a victim of a crime in their community. Females, daily users of smartphones, daily social media users and families with children living in their household are most concerned about their personal information. It’s most important for Americans to know what information is being collected, how it is being used and who has access to their information.
Lack of knowledge about how personal information is collected and shared prevents Individuals from taking action

Consumers are uninformed in part because they don’t understand what information is being collected about them, how it’s being used or with whom it is shared and, therefore, don’t know what they can do to manage it. They don’t believe companies are transparent in the manner in which they collect personal information and there are many factors that prevent Americans from taking steps to protect their personal information. Most express a high level of concern about the lack of control over their personal information:

- 87% of individuals are either somewhat or very concerned about their information is shared with another party without their knowledge or consent.
- 65% of the public somewhat or strongly agrees they are not able to control how their information is used or shared and that prevents them from taking steps to protecting their personal information.
- Two-thirds of Americans would accept less personalized content during their online experience, including fewer discounts, in order to keep their personal information private.

The public feels that they, themselves, have the most responsibility in protecting their personal information. Therefore, they have resorted to managing it by setting strong passwords and only conducting business with companies they trust. They are also unsure of why to take action or if what they do will make a difference:
Q. There are many ways that you can protect the information you provide online or that might be available to others in the digitally connected world. Please indicate whether or not you have done or currently any of the above.

- 49% of individuals are not familiar with how or why to set their Internet browser to the “do not track” mode.
- 52% indicated they do not give inaccurate information about themselves because they do not pretend to be someone they are not.
- 41% are not familiar with how or why they would need to learn more about electric meters, cars, appliances and what information is collected about them.
- 82% agree or strongly agree default privacy settings are inconsistent across different mediums and that prevents them from taking steps to protect their personal information.

Q. Above is a list of actions you can take to protect the information you provide online. Which of the following are reasons you don’t take action?
Perceived values of personal information vary greatly

The responses indicate there is a knowledge gap about the perceived and actual value of various types of personal information to companies or third parties. For example, Americans believe their location and driving habits are least valuable to companies or third parties. Further, the majority of Americans believe their credit card information is “extremely” or “very” valuable to companies or third parties.

- 78% perceive their credit card information to be most valuable to companies and third parties.
- More than half of Americans believe their list of contacts have high value.
- Only 26% of public feel information about their driving habits are valuable or extremely valuable.
- 56% feel their location and shopping patterns while in a store are valuable to companies or third parties.
- List of contacts is perceived as “very valuable” or “extremely valuable” to 55% of the Public.

Considering only 8% of the public thought information about their driving habits was valuable to companies, implies a huge knowledge gap with the majority of Americans. This could be an indication that consumers are not aware about how personal information can be used in other contexts both as a benefit and a risk.

Levels of trust vary greatly and the health insurance providers and financial institutions are more trusted than not

Consumers were asked to rate institutions by how well they thought they would responsibly handle their information on a scale from 1 to 100 – 100 being most trusted. Consumers ranked their health insurance provider and banking or investment companies as the most trusted entities and were rated at 56 and 57 respectively. This indicates they are more trusted than not, and rank much higher than advertisers at 22 and companies who collect and sell personal information at 15. Overall, early adopters of technology are generally more trusting of all entities.
Q. How much do you trust the entities above (regardless of whether or not you currently use them) to use the personal information you provide responsibly? Please use a scale from 1 to 100, where “1” means you do not trust them at all and “100” means you trust them completely. You can use any number between 1 and 100.

<table>
<thead>
<tr>
<th>Entity</th>
<th>Mean Score (1-100)</th>
<th>Trust to use personal info provided responsibly</th>
<th>Trust to use personal info collected without knowledge responsibly</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your health insurance provider</td>
<td>56.5</td>
<td>54.1</td>
<td>-2.4</td>
<td></td>
</tr>
<tr>
<td>Banking or investment companies</td>
<td>55.6</td>
<td>53.8</td>
<td>-1.8</td>
<td></td>
</tr>
<tr>
<td>Websites you use or do business with</td>
<td>49.3</td>
<td>48.1</td>
<td>-1.2</td>
<td></td>
</tr>
<tr>
<td>Your email provider</td>
<td>46.8</td>
<td>48.8</td>
<td>-2.0</td>
<td></td>
</tr>
<tr>
<td>Your Internet Service provider</td>
<td>48.2</td>
<td>50.1</td>
<td>+1.9</td>
<td></td>
</tr>
<tr>
<td>Your cell phone provider</td>
<td>47.5</td>
<td>44.7</td>
<td>-2.8</td>
<td></td>
</tr>
<tr>
<td>Your cable, digital or satellite TV provider</td>
<td>47.3</td>
<td>49.3</td>
<td>+2.0</td>
<td></td>
</tr>
<tr>
<td>Brick and mortar entities you use or do business with</td>
<td>46.3</td>
<td>46.6</td>
<td>+0.3</td>
<td></td>
</tr>
<tr>
<td>Your state or local government</td>
<td>39.7</td>
<td>41.2</td>
<td>+1.5</td>
<td></td>
</tr>
<tr>
<td>The federal government</td>
<td>35.8</td>
<td>37.8</td>
<td>+2.0</td>
<td></td>
</tr>
<tr>
<td>Smartphone or tablet apps</td>
<td>33.9</td>
<td>35.2</td>
<td>+1.3</td>
<td></td>
</tr>
<tr>
<td>Communication tools or services (e.g. instant messaging, video calls)</td>
<td>33.1</td>
<td>34.0</td>
<td>+1.6</td>
<td></td>
</tr>
<tr>
<td>Websites in which you post comments or act as a participant</td>
<td>31.3</td>
<td>33.9</td>
<td>+2.6</td>
<td></td>
</tr>
<tr>
<td>Social networking websites, such as Facebook, Twitter, LinkedIn, etc.</td>
<td>27.6</td>
<td>29.2</td>
<td>+1.6</td>
<td></td>
</tr>
<tr>
<td>Advertisers</td>
<td>21.9</td>
<td>22.1</td>
<td>+0.2</td>
<td></td>
</tr>
<tr>
<td>Companies that collect and sell information (data brokers)</td>
<td>15.1</td>
<td>15.3</td>
<td>+0.2</td>
<td></td>
</tr>
</tbody>
</table>

Q. How comfortable would you feel if any of the above had access to personal information digitally collected about you (such as your history of web activity, recent location, purchases, health information etc.)? Please use a scale from 1 to 100, where “1” means you are not comfortable at all and “100” means you are completely comfortable. You can use any number between 1 and 100.

There is a great need to educate and create awareness about privacy and emerging technologies. U.S. consumers of all ages clearly understand they need to protect social security numbers and credit card information. 77% of older adults – ages 55 and older – are least comfortable providing their social security number when asked while 74% of middle aged adults feel least comfortable. When asked about
learning more about emerging technologies, however, 75% of respondents indicated they have never done or don’t currently learn more about electric meters, cars, appliances and medical devices that are connected to the Internet and what information is collected and shared about them. This indicates a knowledge gap related to how personal information is used and collected by emerging technologies. Therefore, there is a strong need for awareness and education efforts as new technologies emerge to help consumers understand the landscape.

Key insights from the above research resulted in privacy messaging that was tested by consumers

Based on the first phase results, the multi-stakeholder group developed 10 privacy messages around knowledge, trust and impact of reputation/sharing. The comparison of personal information to money resonated as the single most important message. The respondents reported that the following messages were: Important to me, get my attention, make me want to learn more and make me want to take action.

• Personal information is like money – Value it. Protect it.
• Demand privacy – you deserve it!
• Share with care – what you post can last a lifetime.
• It’s not free if you are paying with your personal information.

While the following top three messages resonated overall, each had a different impact for individuals of different ages.

• “Share with care – what you post can last a lifetime” ranked high with young adults.
• “Personal information is like money – Value it. Protect it” was effective with adults ages 26+.
• “STOP.THINK.CONNECT. personal information is important to protect” scored high among adults 35 years and older.

Q. There are many ways that you can protect the information you provide online or that might be available to others in the digitally connected world. Please indicate whether or not you have done or currently do the above.
Q. Above are several brief messages about your personal information online and in the digitally connected world. Please read each message and indicate whether you agree or disagree.

Q. Looking at all of the messages that were of higher importance to you, which ONE is the most important to you personally?