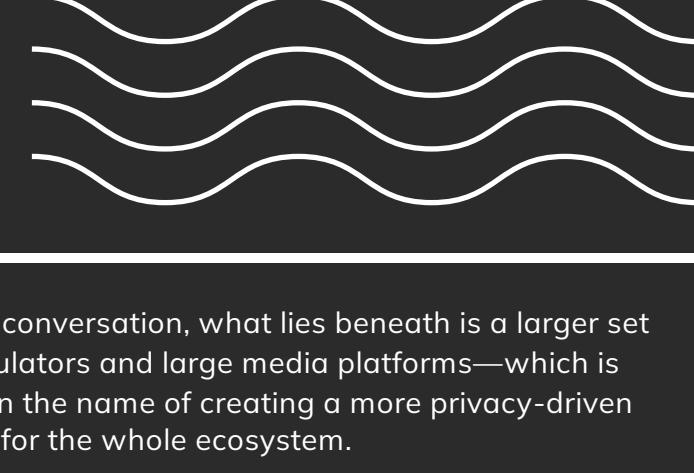


Data Privacy

Consumer Research



While the advertising industry has been swept up in the cookie conversation, what lies beneath is a larger set of converging forces—driven by consumers, browsers/OS's, regulators and large media platforms—which is changing the signal landscape, by design. And they're doing it in the name of creating a more privacy-driven advertising future, which has implications both large and small for the whole ecosystem.

As part of OMG's ongoing assessment of critical marketing trends, OMG Research, in partnership with TRKKN, conducted a proprietary study to explore data privacy through the lens of consumers, specifically their sentiments and behaviors related to data use. The research was designed to help enrich our collective understanding of the needs and wants of this critical constituency as we all work to build data and technology infrastructure that is sustainable and provides privacy-friendly approaches to advertising going forward.

We addressed several things in this study including consumers' awareness of and knowledge about data privacy; their concerns about their own privacy; their willingness to share their data, under what circumstances, and more. We also explored how consumers expect brands to behave when it comes to responsible data use, which requires experts, like TRKKN, to ensure that technology is set up to support those expectations.

These insights, taken as a whole, can help guide brands as they navigate this new advertising future.

Key Insight #1: Consumer Expectations Are High but Variable

Consumers Care About Their Data Privacy, and Have Concerns About How Much of Their Data is Being Collected

88%

Of Consumers Say They Care About Their Data Privacy



53%

Have Concerns About How Much of Their Data is Being Collected

FYI

In 2021, just one-third (33%) of consumers indicated **extreme concern** about the privacy of their online data (Nov 2021)

As a Result, Many Consumers are Engaging in Avoidant Behaviors Which Can Negatively Impact Brands' Data-Driven Marketing Efforts



Over Half (55%) Of All Consumers Have Engaged in Avoidant Behaviors (E.g., Opted-out of Personalized Advertising, Installed an Ad Blocker, Used a VPN)

21%

Made a Conscious Decision in the Past to Not Buy a Product/Service to Avoid Sharing Their Personal Data

However, People are not Monolithic. Willingness to Share Data, and Under What Circumstances, Varies Widely.

72% Of Consumers are Willing to Share Their Data but have Varied Expectations and Requirements

Brazen Sharers

Will Share Anything and Everything – Especially for Personalized Experiences

7%

Reluctant Sharers

Hesitant to Share Data but Will Share if They Can See it Being Beneficial

22%

Data Guardians

Value Their Data Privacy and Will Only Share if it is 100% Required for Getting What They Want

43%

Wary Novices

Don't Know Much About Data Privacy but Tend to Not Share to Keep Themselves Safe

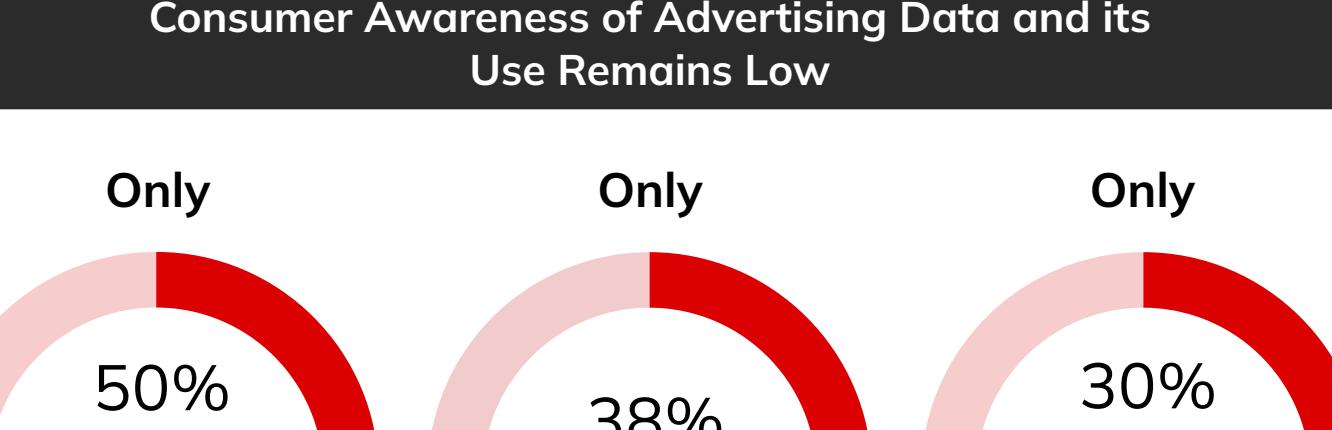
13%

Data Recluses

Will Never Share Their Data with Any Brand or Company

15%

And Despite Conventional Wisdom, These Data Sharing Preferences Don't Align to Traditional Generational Breakdowns

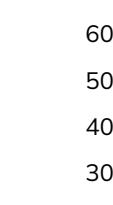


Though Willingness to Share Data Varies Across Categories & Data Types

Consumers Trust High-Involvement Categories

3X More

Than Low-Involvement Categories for Handling Their Personal Data



Healthcare/
Pharma

29%



Required Insurance

26%



Wireless Service
Providers

22%



Home
Improvements/Décor

9%



Alcohol

8%



Toys/Sporting
Goods/Hobbies

8%

Higher Involvement

Lower Involvement

TRKKN TAKEAWAY

Invest In **Technology** that will Capture and Honor the Consumers' Preferences, Allowing the Data to be Used for Advertising Purposes.

Key Insight #2: Consumers Don't Like Creepy or Intrusive Data Use. They Like Relevance.

Ads That "Haunt" Me After I Made my Purchase Make me Feel Negatively about the Brand Being Advertised.

25%

Personalized Advertising

Scares Me

19%

Consumers Are Open to Data Sharing for **Relevant** Advertising and Content

Consumers Will Share Their Data for:

64%

Cheaper products

63%

More relevant ads

62%

More relevant
recommendations

60%

Cheaper devices

57%

Access to more
personalized
content/advice

55%

Access to content

TRKKN TAKEAWAY

Map the Data You are Currently Collecting and Only Use the Data Necessary for Advertising Use Cases.

Contact TRKKN for more information: info.us@trkkn.com

www.trkkn.com

Methodology & Sample Design:

^ National Online Survey Fielded via QMG Signal March 22–March 23, 2024. Among 1,056 U.S. Consumers, Ages 18–99. U.S. Census Rep Demographics.

For Questions About This Research, Please Contact:

OMGresearchteam@omnimediaadgroup.com

TRKKN:OMG

80%

70%

60%

50%

40%

30%

20%

10%

0%

28%

42%

January 2022

January 2024

However, an Increasing Number of Consumers Expect Brands to Protect Their Data Privacy

42% Of People Expect Brands to Take a Stand On Protecting Data Privacy

80%

70%

60%

50%

40%

30%

20%

10%

0%

28%

42%

January 2022

January 2024

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TRKKN:OMG

50%

40%

30%

20%

10%

0%

50%

38%

30%

Are Aware That
Companies, Brands,
and Platforms
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Data Brokers Sell
Their Data

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