

# Global Consumer State of Mind Report

Shedding light on our digital shadow

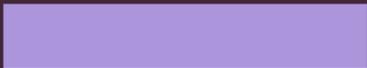
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## Foreword

**Every day, we access countless online services without thinking beyond our immediate concerns – visiting websites, using a ride sharing app, streaming a film or wearing a fitness tracker for instance. But each of these steps leaves behind a digital shadow – a trail of data that represents a virtual version of ourselves.**

As the number of services we access online grows, so too does the amount of data we share with brands, businesses and organizations. Much of this data is needed to deliver or improve the services we want, but many companies may also be selling data or using it in ways that go beyond our expectations. The increasing complexity of these services, and our dependence on so many of them for daily activities, is making it trickier than ever to navigate our privacy in a data-driven world.

At the Future of Privacy Forum, we work to advance principled data practices to help set the norms for how organizations use personal data. Through this work, we have seen that as data regulation updates reach inboxes and privacy breaches hit the news, the public better understands the importance of protecting their digital selves. Now, more than ever, they want to understand the benefits and risks of data processing.

That is exactly what this report from Truata lays out. Truata research has shown that consumers across the globe place a high value on their data privacy and will not be shy to abandon brands they feel don't treat their personal information responsibly.

The findings show that the public are using their voice. It is now in the hands of companies to address how they use this data, build trust with the public and protect our digital selves as we embrace innovative use of data in the future.

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Jules Polonetsky  
CEO, Future of Privacy Forum



# Introduction

**We are living through the most profound transformation of our digital lives. Brands are now able to build ever more detailed profiles of us from our digital footprint. This helps them to establish personal relationships to improve the accuracy and engagement of their services. But for consumers, when it comes to brands using our personal information to build those relationships, there is often a fine line between being helpful and invasive.**

The lure of tailored digital experiences presents a personalization paradox for many. Consumers welcome relevant offers, but it is our personal data that's being leveraged, even exploited, as currency for these targeted promotions and products that appear 'perfect' for us. Reliance on the technology that makes our lives easier and more enjoyable has left our digital selves ever more exposed.

Our research found that consumers want tailored experiences and convenience, but not at the expense of a perceived erosion of their privacy. They accept the need to share their personal data – but they still want to own it and have control over their digital shadow.

In fact, more than three-quarters (77%) of consumers around the world believe they should own their digital selves. Consumers are making it clear that they want to reclaim ownership of their data – and will take steps to protect it from cavalier or inappropriate use by organizations and brands.

This report is a benchmark of the current global consumer state of mind in the UK, France, India and the USA towards data privacy and the value of insights derived from our personal data. It also investigates the challenges and fears that consumers face with their online data globally and the differing attitudes in each country across generations.

For businesses with an online presence, this report outlines the real threat facing those who ignore consumer attitudes to data privacy, contrasted with the benefits on offer to those who are following responsible data practices – increased trust and greater loyalty from consumers.



Felix Marx  
CEO, Truata



## About Truata

**Truata is the privacy-enhanced data analytics solutions provider that specializes in de-identification and true anonymization of data. The company enables businesses to unlock powerful insights with its suite of proprietary solutions, while complying with the highest global data protection standards to build trust and transparency with their customers. Truata is based in Dublin, Ireland.**

**For more information visit [www.truata.com](http://www.truata.com).**



## Influencers participating in the report



Bernard Marr is an internationally best-selling author, popular keynote speaker, futurist, and a strategic business and technology advisor to governments and companies. He helps organizations use data more intelligently and understand the implications of new technologies such as artificial intelligence, big data, blockchain, and IoT.

**Bernard Marr**

**Founder & CEO, Bernard Marr & Co**

[linkedin](#) | [twitter](#)



Jeannie Walters is a customer experience speaker, writer and consultant with more than 20 years' experience in assisting all types of companies, including Fortune 500. She hosts customized workshops and webinars, and is a regular keynote speaker. Her podcast Crack the Customer Code has garnered praise for its engaging industry insights.

**Jeannie Walters**

**Host of the Crack the Customer Code podcast**

[linkedin](#) | [twitter](#)



Rebecca Herold has over 25 years of IT, info sec and privacy experience. Known as "The Privacy Professor" she is also the host of the radio/podcast show "Data Security and Privacy with the Privacy Professor". Rebecca has also written numerous articles and books on data privacy, and is a regular keynote speaker at conferences, seminars and private events.

**Rebecca Herold**

**The Privacy Professor**

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## Methodology

**8,000 interviews were conducted in the UK, France, India and the USA by Arlington Research, an independent market research agency, using an online methodology amongst a nationally representative sample of consumers. 2,000 respondents were surveyed in each country. Nationally representative samples were achieved in each country based on gender, age and region or state, with minimal weighting applied to India for gender and age.**

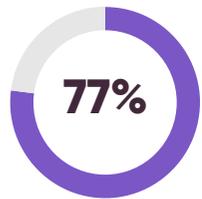
**Age ranges are defined as follows: Generation Z (born between 1994-2003), Millennials (born between 1980-1993), Generation X (born between 1965-1979), Baby Boomers (born between 1946-1964) and the Silent Generation (born before 1946).**



# 2020 key findings



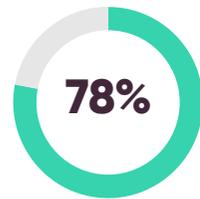
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of global consumers believe they should own their digital selves



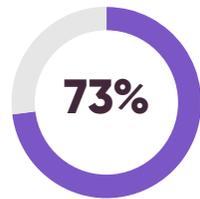
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have taken steps to reduce their digital footprint



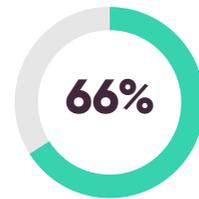
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believe independent data protection regulation is more important than ever



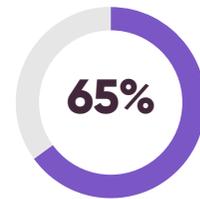
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are more likely to be loyal to a brand they trust to use data appropriately



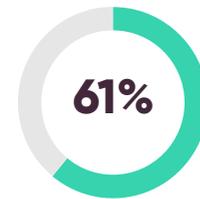
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would stop using brands that don't behave responsibly with personal data



06



have stopped using brands that 'stalk' them online

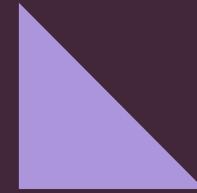


## Taking control of your digital self

**Consumers today are trapped in a digital dichotomy. To access the personalized services that make our lives easier and more comfortable, we are being asked to share more personal data than ever. In this environment, our research found that 65% of consumers have no idea about how much of their personal data is collected and what it is used for.**

This is leading to a 'consent conundrum' where consumers are torn between needing to share their data in order to access the services or brands they want to use – and wanting to protect their privacy.

We are seeing a reaction from consumers against the control of personal data by companies and the pervasive use of that data. At least six-in-ten global consumers (64%) will engage more with brands that make it easy to control how their data is used.

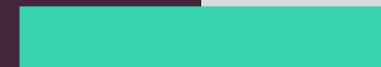
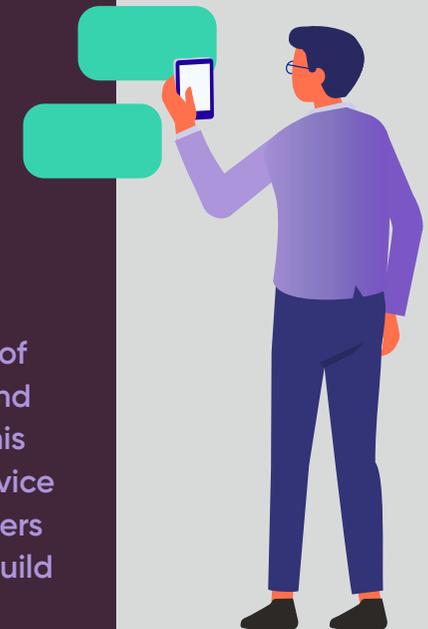


**“Ethical business practices apply to data collection and handling too. Consumers are demanding details of why their data is being collected and for what purpose. The findings of this research add real weight to the advice that businesses must allow consumers to have control over their data to build trust with brands and allow long-lasting relationships to flourish.”**

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**Bernard Marr**

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## Valuing the right to be forgotten

As more of our data is shared with brands – sometimes without us actively sharing, or even knowing about it – it becomes harder to keep track of who has access to our information, and which companies will contact us or show us targeted promotions. Amid all this confusion, consumers want to know that they are able to exert control of their digital selves and take steps to remove access to it when they feel contact has become invasive. They want the right to object to processing of their data or demand their data can be forgotten.

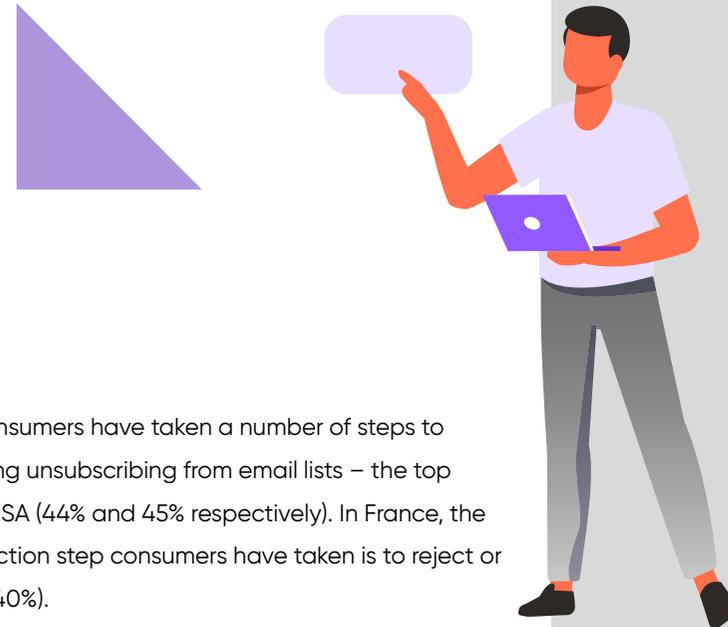
Many consumers are already taking steps to ensure control of their digital shadows. We found that eight-in-ten (78%) global consumers have taken one or more steps to avoid sharing their data with brands in the first place – including using private browser modes on their devices (32%) and falsifying data (18%). This reaches 82% in India, where 40% of consumers have used a private browser mode to protect their data.

**“Consumers are fed up with having to repeatedly take steps to monitor and protect their own digital privacy. Instead they want convenience, security and trust from the brands they use. Businesses must respond to each of these three areas to deliver an exceptional customer experience that will create loyal consumers.”**

**Jeannie Walters**

Elsewhere in the world, consumers have taken a number of steps to protect their data, including unsubscribing from email lists – the top action in the UK and the USA (44% and 45% respectively). In France, the most common data protection step consumers have taken is to reject or disable tracking cookies (40%).

Notably, taking steps to manage privacy is one area of data privacy where younger consumers are more proactive than older generations, with 83% of Generation Z and Millennials having taken steps to protect their digital selves, compared to just 63% of the Silent Generation. This shows that young consumers may feel more in control of their digital privacy because they are more aware of how to take steps to protect themselves.



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# A call for greater regulation

In the past two years, widespread coverage of new data regulations – from the General Data Protection Regulation (GDPR) in Europe, to the California Consumer Privacy Act (CCPA) in the USA, has pushed regulations to the front of mind for many consumers. In India too, the planned launch of the Personal Data Protection Bill (PDPB) has led more consumers to consider how their data is used and shared.

This has led consumers to increasingly see the importance of independent regulation to oversee use of their data from the companies that hold it. Almost three quarters of global consumers (73%) agree that independent regulation of data protection is now even more important than ever before.

Overall, 69% of consumers stated that it is essential to have effective data protection regulation managed by government or independent regulatory bodies. This cuts across all countries – the USA is the only country where less than 70% of consumers agree with this statement. However, 59% of consumers think that most companies don't really believe in the inherent importance of data protection as their attitude reflects more of a tick-box exercise to comply at a minimal level with data regulations.

**“This report sends out a clear message to brands that they need to proactively embrace the spirit of the law, rather than the letter of it, to really set themselves apart.”**

**Bernard Marr**



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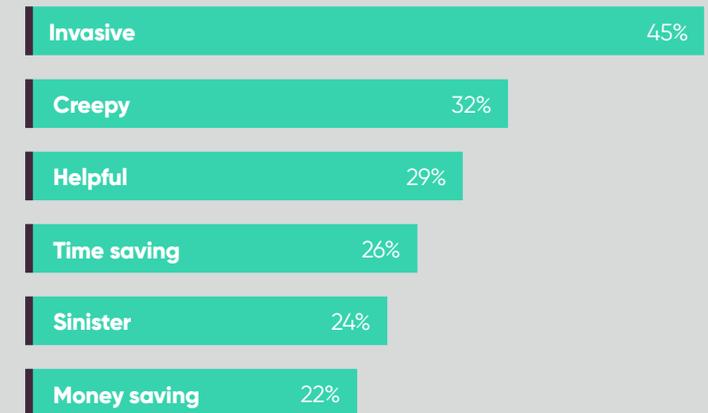
## The personalization paradox

### What we asked

How would you describe how you feel about your digital behavior being tracked and analyzed to provide you with a personalized experience?\*

### What we found

At least **four-in-ten** of global respondents find data tracking for personalization invasive.



\*respondents were asked to select all emotions that applied to them

## Trustworthy brands will be more profitable in the age of digital privacy

**“If you’re careless with my data, I will stop buying from you.” That is the clear message that our research has shown consumers are warning brands.**

Almost two thirds of global consumers (63%) would stop using a brand if they felt it didn’t demonstrate that it cares about being responsible with personal data. This remains high across all countries.

Even if consumers have agreed to share their data, they are still sensitive to digital creep – occasions when services use their data to connect with them too often, or in ways they don’t want, or wouldn’t reasonably expect. We found that six-in-ten global consumers (61%) would stop using brands that ‘stalk’ them online with too many personalized offers.

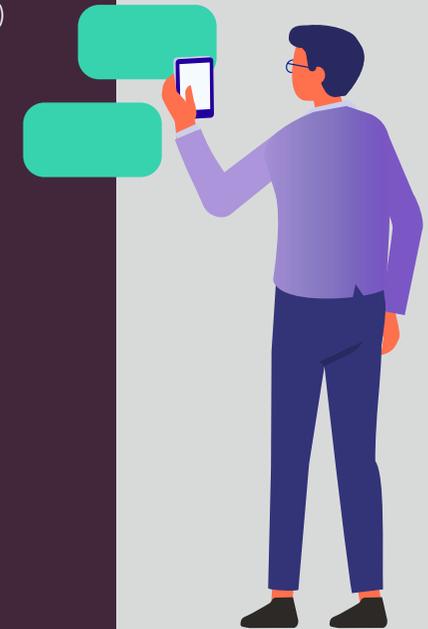
Conversely, there is a big potential reward for brands who approach usage of personal data responsibly. Two thirds of global consumers (66%) are more likely to be loyal to a brand they trust to be transparent with how they use their data, and not sell it on or use it inappropriately for a secondary purpose such as analytics or to track behavior.

This consumer trust is likely to lead to higher revenue, as around six-in-ten global consumers (58%) agree they would spend more money with a brand they trust with personal data. In India two thirds (66%) agree, compared to France (50%), the UK (53%) and the USA (61%).

**“When your digital services seem to know what you want before you do, it can be useful. But these stats show that many more consumers consider it creepy. Brands must allow consumers to understand how their data will be used so they are filled with wonder, not woe at the extent of their digital footprint.”**

**Bernard Marr**

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## Misuse my data at your peril

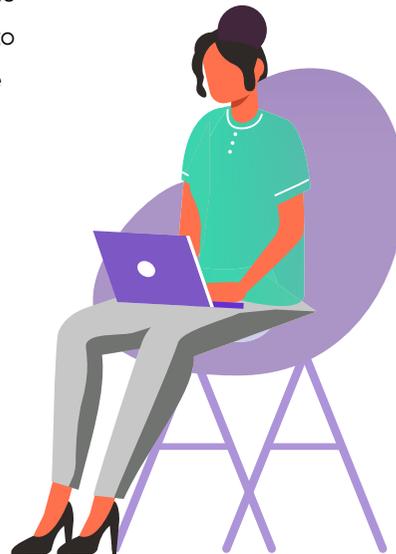
Our findings highlight that social networking sites would be hit hardest following data misuse. In the past few years, we have seen a number of high-profile social media privacy leaks. Respondents to our survey aren't likely to stick around if that continues to happen.

Over half of global consumers (57%) stated they are unlikely to trust a social networking site if they had a publicized misuse of data in the last three months. That's compared to half of global respondents (50%) who would be unlikely to trust a search engine, 49% who would be unlikely to trust an online retailer and 46% who would be unlikely to trust a mobile phone network.

In fact, nearly one third (30%) of global consumers stated they have already stopped using or deleted a social media account because of data privacy concerns.

**"Consumers are becoming more aware of, and concerned, about privacy. As their concerns grow and their awareness rises, so too does their belief that they should own and control personal information that can have an impact upon many aspects of their lives. At the same time, consumers are eager to embrace new technologies that typically don't allow them to have an awareness and control of their personal data."**

Rebecca Herold



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### The trust factor: which types of companies are the most trusted with data?

#### What we asked

How likely would you be to trust the following type of company if they had a publicized misuse of data in the last three months?

#### What we found



Responses from a global audience based on answers to 'very likely to trust' or 'quite likely to trust'

## When data tracking becomes invasive

Sharing of personal preference data is one thing, but when data relates to health, lifestyle or activity, consumers are more clearly uncomfortable with brands using it for secondary purposes – even if they offer benefits to the consumer.

Only 16% of UK consumers think it is acceptable for their supermarket shopping behavior to be combined with fitness records from wearables and sold to their health insurance company. Meanwhile, just over a quarter of global consumers (27%) agree.

However, there are particularly interesting cultural differences across each country studied. Almost half (49%) of respondents in India feel this scenario is acceptable, along with nearly a quarter (24%) of those in the USA. Comparatively, only 16% of the UK and 18% of those in France agree.

**“Attitudes towards data privacy represent one of the biggest changes to the digital landscape in generations. And when the landscape changes, you need a new map. Businesses must now chart a new route to a more transparent relationship with consumers.”**

**Jeannie Walters**



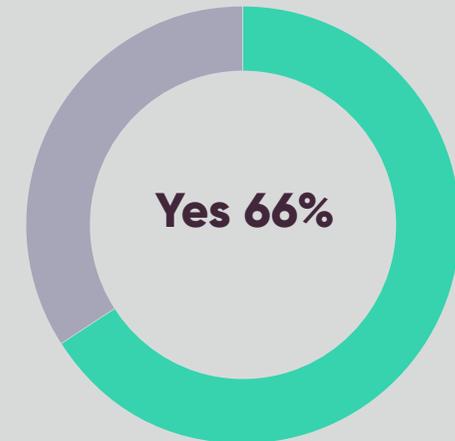
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### Earn my trust, and I will be loyal and spend more with you

#### What we asked

I am more likely to be loyal to a brand if I trust them to use my personal data appropriately.

#### What we found



Response from global average figures

## Conclusion

This report is a stark warning to brands, governments and regulators that people want more control and transparency over their personal data. Consumers around the world expect to see changes made by brands and regulators to help them shed light on their digital shadow, take control of their digital selves and prevent their data being misused.

While consumers welcome relevant deals and offers as part of tailored experiences, they evidently value their data privacy more and are likely to spend and engage more often with brands who use their data appropriately. The research is clear: brands who don't act responsibly with personal information are likely to lose consumers to competitors who can demonstrate they are more responsible when it comes to data use.

Soon the economic value of customer data, or data equity, will become just as important as brand equity, offering enormous potential for data-driven organizations. But, as this report shows, businesses must be careful not to abandon the humans powering our big data world.

**"Providing consumers with easy to use capabilities for controlling how their data is used and shared, and how to delete data they no longer want to share, has become a significant competitive differentiator for brands who gain the trust of consumers through providing such privacy controls and transparency."**

Rebecca Herold

As consumers turn their attention to the substantial value that their data holds, they are reacting against 'invasive' brands who use their data irresponsibly, or in an overly intrusive manner. As consumers weigh up this balance, it is now up to these businesses to embrace considered and accountable approaches to consumer data.

Ignoring this call will risk losing consumers for good, which no business can afford in today's climate. But for those brands who heed the individual's cry for control over their digital selves, there is a huge opportunity to gain consumer trust and secure brand loyalty for generations to come.



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**"Our report outlines the real threat facing businesses who ignore consumer attitudes to data privacy, contrasted with the benefits on offer, such as increased trust and greater consumer loyalty, to those who are following responsible data practices. They accept the need to share their personal data – but they still want to own it and have control over their digital shadow."**

Felix Marx  
CEO, Truata

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