



**Maintaining momentum
GDPR 6 months on**

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Your speakers today



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Agenda

1. Introduction

2. Key insights

3. GDPR Benchmark

4. What's next and Q&A

Introduction

GDPR Benchmark – what and why?

GDPR became applicable the 25th of May

The primary aims of the regulation are to strengthen the rights of individuals whose personal data are being processed and harmonise the previous Directive across the EU.

Deloitte's GDPR Benchmark

- Did GDPR have the impact the regulators desired, and the public appear to crave?
- Deloitte conducted a survey to gain insights into attitudes of organisations and consumers towards privacy since the 25th May.
- In 11 countries with 2750 respondents in total.

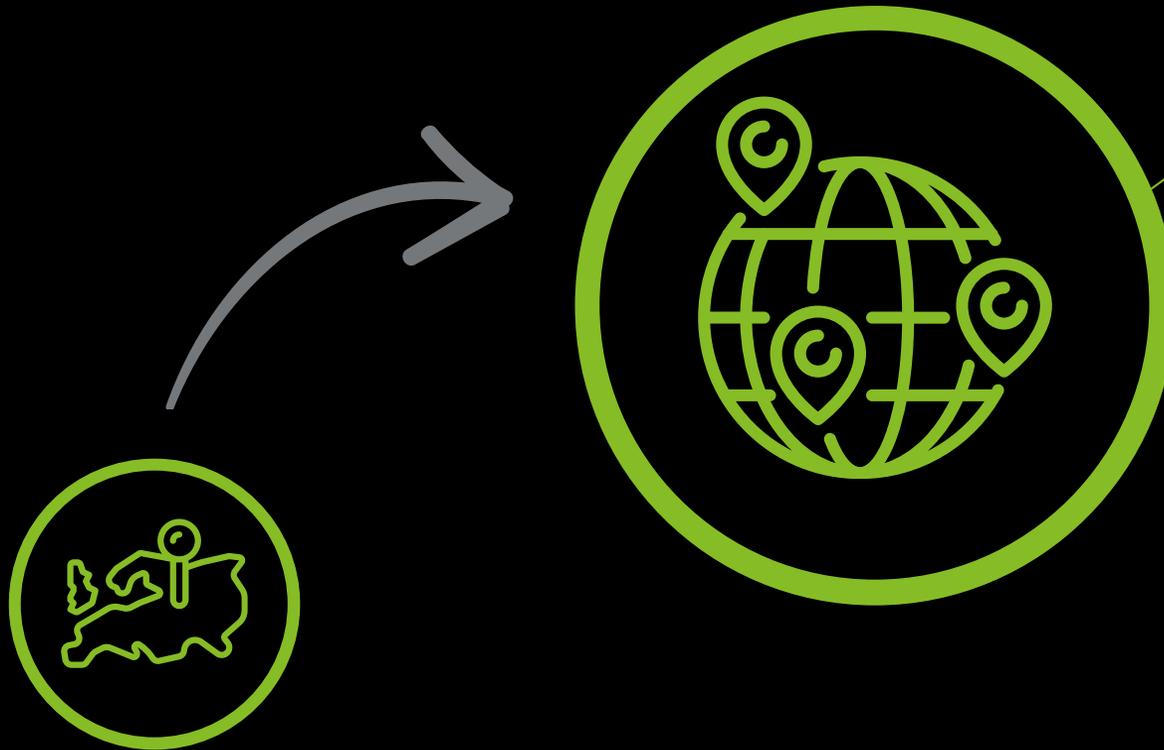
Purpose of the webinar

- This webinar will give an overview of the survey results and our insights and conclusions.
- The full report will be released in the coming week.



Key insights.

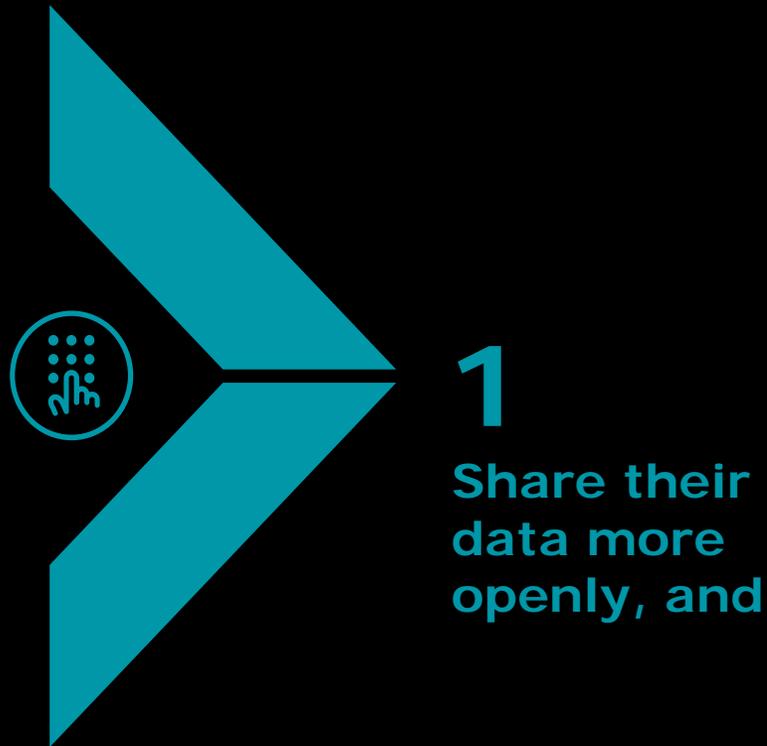
Privacy is a global concern
GDPR has an increased territorial scope



The increased territorial scope of GDPR has had a clear impact. There has been equal focus by organisations inside and outside the EU on the topic of personal data. Consumer perception is similar, with attitudes broadly aligning.

Trust is key

Ethical use of data is seen as an increasingly important driver of consumer trust. When individuals trust organisations, they:



Consumer centricity is not yet there

Awareness of privacy is increasing, but more customer centricity is necessary to increase individuals' control over their data



Individuals' trust

Individuals' level of trust is increased by giving them control over their personal data.



Privacy notices

More than half of the respondents agree that privacy notices have become clearer.



Organisations care

44% of the respondents feel that organisations care more about their privacy.



GDPR programmes

GDPR programmes have not done enough to increase individuals' control over their data.



Privacy notices

Individuals still pay little attention to privacy notices.

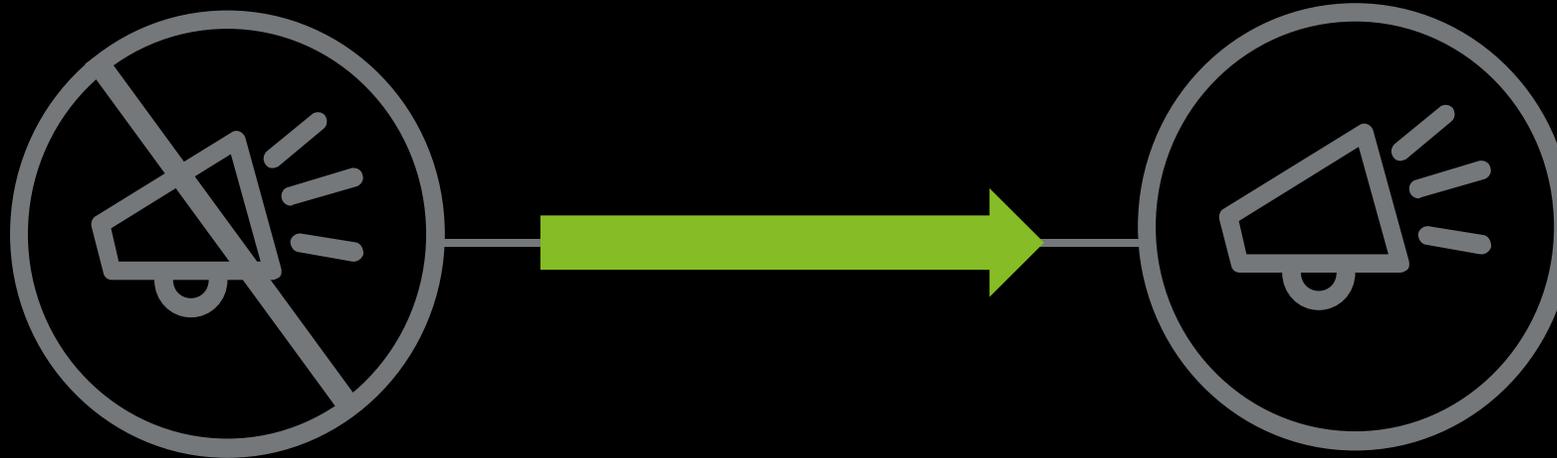


Focus on compliance

GDPR programmes may have been too focused on internal compliance rather than taking a consumer centric view.

When will consumer action follow perception?

There is a disparity between consumer perception and action



Disparity between consumer perceptions and actions

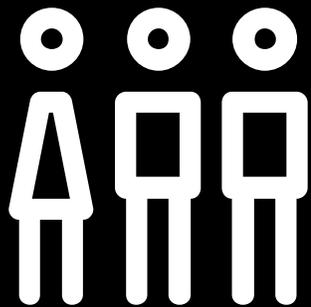
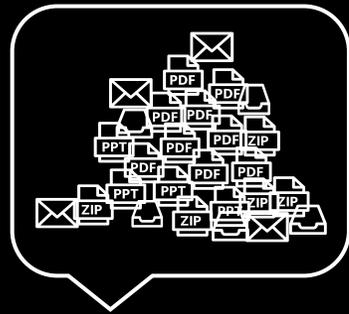
While the perception and importance of privacy is increasing, consumer actions are still slow to follow suit.

Consumer action will eventually follow

Misuse of data is likely to drive a strong consumer reaction.

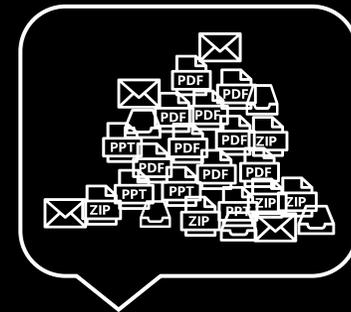
Talent matters

Organisations have increased their privacy teams, but still struggle to reach the appropriate capacity



Most organisations have increased their capacity to manage privacy compliance.

But many organisations still see challenges in headcount and reaching appropriate capacity.



GDPR Benchmark.

Survey results

Consumer view

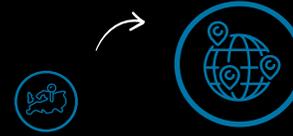
Consumer Opinion on GDPR compliance

Do organisations care?



PERCEPTUAL CHANGE IN CONSUMERS' OPINIONS

44% of all respondents believe that organisations care more about consumers' privacy now that GDPR has entered into force.



CONSUMERS FROM EU MOST SCEPTICAL

Consumers from the EU appear most sceptical with 19% saying that organisations do not care about their privacy. This sentiment is compared to 7% outside the EU.



COOKIES MATTER

65% of our respondents agreed that the excessive use of cookies was a concern for them.



AWARENESS POST-GDPR

58% of respondents reported they took more caution when providing organisations with their personal information.

Do consumers trust organisations to handle data?

Important factors that can be of concern to consumers

Potential misuse of personal data



Potential misuse of personal data was an important factor that would concern the respondents (73%).

Excessive collection of data



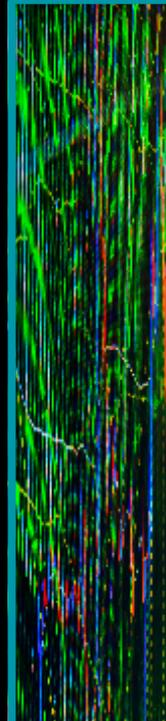
The excessive collection of data was a significant concern for our respondents with 70% agreeing that this would impact the level of trust they have in an organisation.

Data being shared with third parties



Our survey found that 68% of respondents agreed that sharing personal data with third parties is a concern.

Quality and transparency of privacy policies



The majority of respondents (67%) take into account the quality and transparency of privacy policies when deciding the level of trust to place in an organisation.

Are organisations transparent?

One of the key requirements of GDPR is providing individuals with greater transparency on how their personal data is handled through the “right to be informed”



How do consumers use their data subject rights?

The introduction of GDPR has strengthened existing rights for individuals

Respondent's answer	Right of access	Right to opt-out of direct marketing	Right to data portability	Right to erasure
1. Aware of this right	79%	80%	76%	76%
2. Use of this right	10%	20%	9%	12%
3. Have not heard of this right	21%	19%	23%	23%
4. No intention using this right	29%	21%	24%	26%
5. Intention using this right in the future	16%	20%	20%	18%

Insights

1. A great majority of the respondents are aware of their rights.
2. The least used right amongst the respondents is the right to data portability.
3. Around 20% of the respondents haven't heard of any of these rights.
4. Right to access is a right most of the respondents have no intention using.
5. In the future the right of access would be least used by the respondents.

Do consumers value privacy protection?

There is a growing need for organisations to be consumer-centric

Personal Data Management



A large percentage of organisations indicate that they have invested heavily in their GDPR programmes. Nevertheless, **more than half** of respondents claimed that GDPR has had either no or minimal impact on how they perceive the manner in which organisations handle their data.

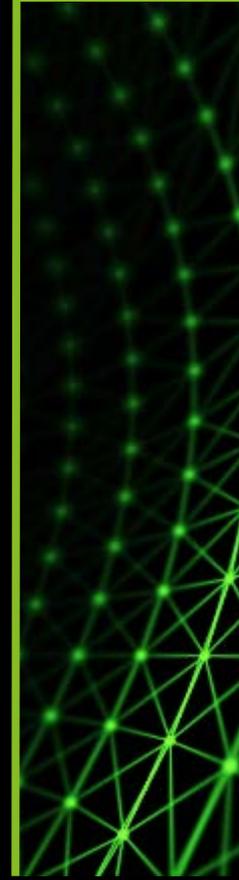
Data Breaches



17% of respondents stated that they would stop using a service / buying from an organisation if a data breach was to occur.

Where a history of data breaches is present, **70%** of respondents identified this as being a concern and having an impact on their level of trust.

Treat your consumer



The survey showed that **more than half** of consumers are willing to share more data to receive personalised benefits and discounts.

This demonstrates the growing need for organisations to place consumers at the heart of everything they do.

Organisations' views

Organisations and GDPR compliance

Organisations continue to invest in GDPR compliance

GDPR-reach beyond Europe

Most of the statistics are not influenced by geographical location, since the results of both EU and non-EU respondents are largely consistent.

Investment in GDPR compliance

Almost half of the organisations both inside and outside the EU made significant investments in their GDPR compliance capabilities. Of those organisations, 15% now considers their GDPR readiness programmes complete.

Recruitment for GDPR

70% of the organisations have increased their staff that focus on GDPR compliance. Only 21% have been able to remain on the same headcount while, surprisingly, another 7% have seen its headcount decrease.

Resources

32% of the organisations feel they are not adequately resourced to sustain GDPR compliance. More organisations in EU countries indicated that they do not have the budget to meet resourcing requirements.

Long-term compliance

92% of organisations surveyed in the EU claimed a level of confidence in demonstrating their ability to conform to GDPR in the long term, with near identical results outside the EU.

Tools used for compliance

The majority (over 70%) of the respondents used internal or external tools to support their GDPR compliance activities.



Organisations appoint DPOs

A large majority of organisations surveyed have a DPO in place



Organisations and data subject requests

How are organisations dealing with subject requests?



Organisations have seen a large rise across all access request types.

The most commonly received request has been access requests.



Only 30% of organisations were able to respond to the data requests received within one month.

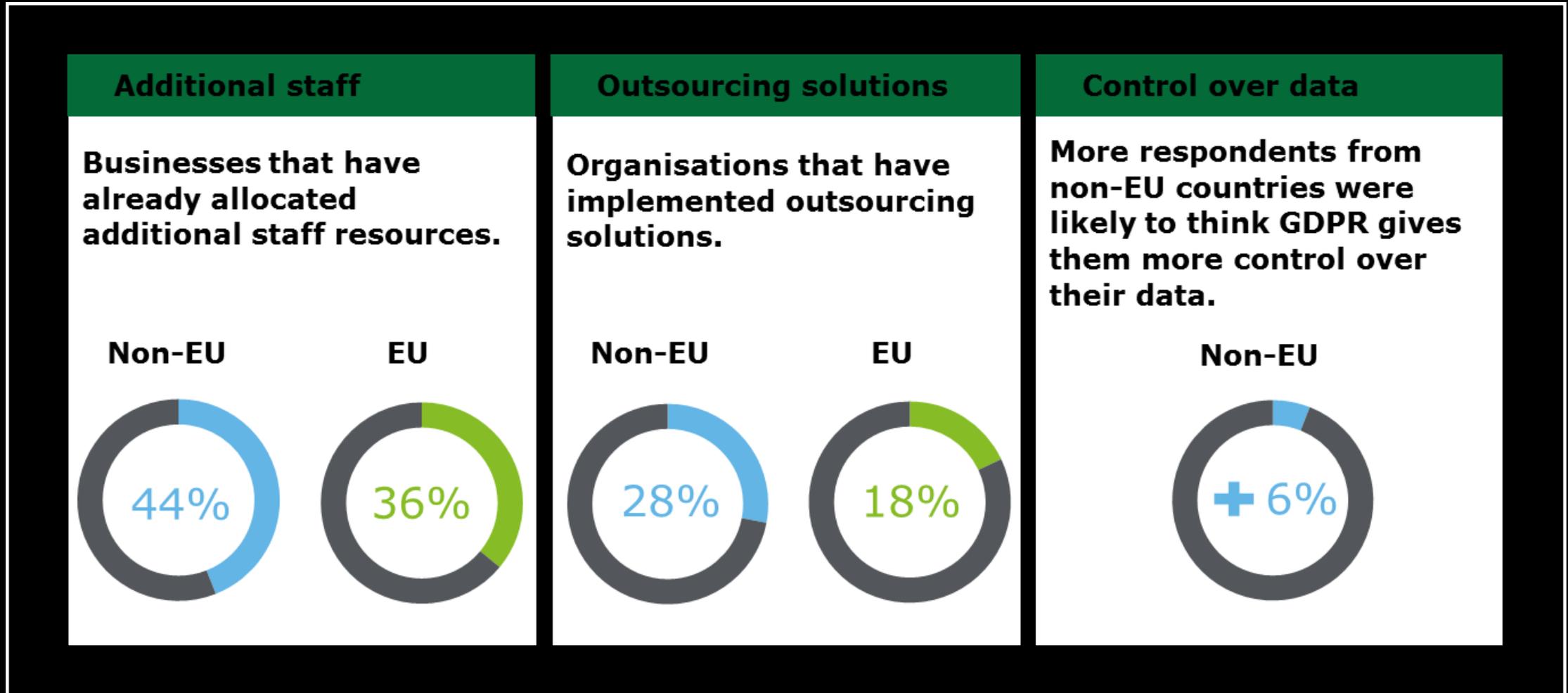
37% of organisations were either unable to keep up with the volume of requests or only able to respond to just a few.



Organisations have measures in place to respond to data requests. E.g. technical discovery tooling (30%), redaction tooling (23%), robotics/AI (19%)

GDPR and the Brussels effect

GDPR beyond the European Economic Area



The importance of trust

Ethical and responsible behaviour is paramount to create trust

Improving consumer trust biggest driver



On average **59%** of organisations see improving consumer trust as a high importance driver for GDPR compliance activities.

44% of consumers feel as though organisations care more for their privacy since GDPR came into effect.

Many consumers have become more aware of how their data is being processed. This translates into more questioning of how organisations handle their data.

Reputation as a an ethical organisation

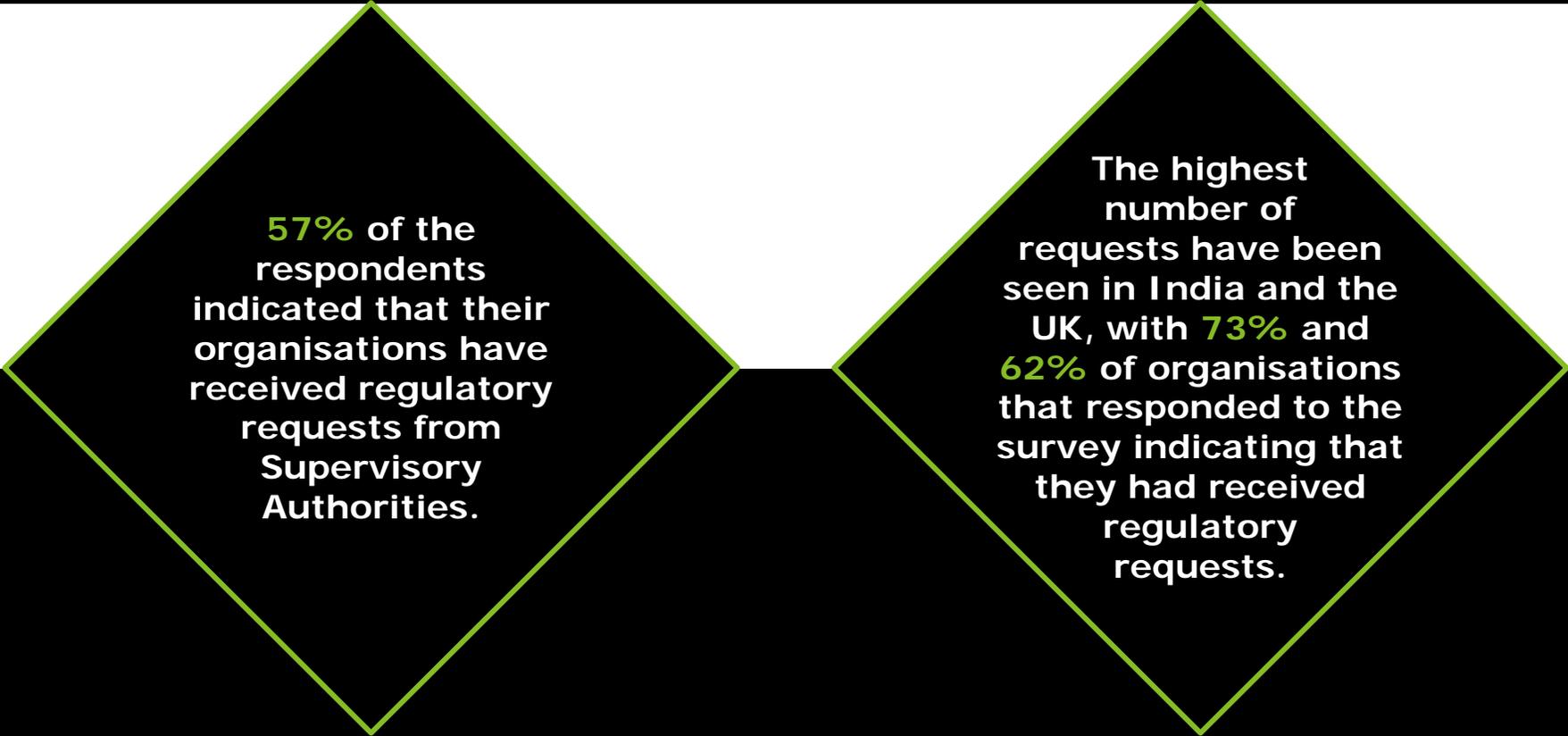


69% of respondents felt that an organisation's general reputation as a responsible / ethical organisation played an important factor in their level of trust in that organisation.

Respondents in non-EU countries felt more strongly about this issue.

Active regulation of GDPR

The regulatory landscape is starting to take shape, but taking time



57% of the respondents indicated that their organisations have received regulatory requests from Supervisory Authorities.

The highest number of requests have been seen in India and the UK, with **73%** and **62%** of organisations that responded to the survey indicating that they had received regulatory requests.

What's next?

What's next?

Conclusions we can draw from the survey

Summary

- GDPR is starting to have the desired effect.
- The majority of organisations report significant activity on GDPR
- Consumers continue to be driven by the value and rewards they receive in exchange for sharing their personal data.

What's next?

- We can expect organisations who demonstrate effective data protection to experience benefits around consumer engagement and loyalty.
- Customer centricity is likely to gain momentum now that core governance activities have been implemented.
- Repeated breaches are likely to get the attention of both consumers and regulators

THANK YOU AND QUESTIONS?

More information

The full report will be launched this week on our website: www.deloitte.com/gdpr