



dataIQTM
Research report

General Data Protection Regulation 2017

Identifying its impact on marketers and the consumer's moment of truth



Preparation

In association with



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Overview

Following the introduction of the General Data Protection Regulation in 2016, a two-year transition period was granted before enforcement begins on 25th May 2018. During that time, organisations involved in the processing of personal data need to review their strategy, policies and procedures for compliance. At the same time, consumers will become aware of a new set of rights which they have been granted by GDPR.

DataIQ undertook a twin-track research project to examine both sides of the data-value exchange in the light of these new obligations and rights. Research has been carried out in two waves in 2016 and 2017 allowing for year-on-year comparisons. The project had three key objectives:

- To understand the consumer perspective on data collection, consent, context and control.
- To understand the business/marketer's processes, opportunities and challenges in adjusting to the new Regulation.
- To identify any mis-alignments between the two sides' views of the data exchange and their root causes.

The research was built around four key areas of data protection and privacy management: permission (the consent requested and granted for data use), personal (the use of trackers and identifiers to personalise content and services), preparation (the standard to which data needs to be held in order to be effective and how this is recognised by consumers) and protection (the effort made by companies to keep sensitive data secure and the expectation of individuals that this will happen). Results from the research are presented in a series of four white papers, each of which looks at one of these areas.

This whitepaper specifically focuses on the research segment conducted by DataIQ, in association with Experian. It looks into the issue of how consumers perceive the importance of accuracy in their personal information and where responsibility lies for keeping it up-to-date, as well as what businesses do to ensure data quality is at the centre of their data strategies.



General Data Protection Regulation 2017 - Protection





Sponsor's comment

Jason Goodwin, Managing Director, Experian Data Quality



As GDPR compliance approaches, it's important to reflect on consumer attitudes towards data accuracy and understand the challenges businesses face to prepare for May 2018.

The latest research from Experian and DataIQ identifies three major defining consumer attitudes towards data use - trusting, rational and cautious. Despite the increasing value people place on their data, their readiness to share information is generally improving, with an overall rise of 14 per cent more willing to share data year-on-year.

However, this comes with a caveat. While 22 per cent of consumers are happy to share their data if they trust the organisation, 42 per cent will only share information if they feel it has been explained why it is needed. This identifies an interesting trend around consumer attitudes towards the trust and transparency of data management processes. Experian's latest [Global Data Management Research](#) mirrors this trend, finding that 72 per cent of businesses agree that data quality issues impact individuals' trust and perception, and that 76 per cent believe that, to be transparent with data practices, an effective data management process needs to be in place.

This need presents an exciting opportunity for businesses in terms of building more meaningful and loyal relationships with consumers. Data IQ's research identifies how the impact of poor data quality is felt across business departments and how, by improving accuracy on behalf of consumers, companies can benefit two-fold by improving their own insight and customer loyalty.

So how mature are businesses' data quality strategies in meeting consumer attitudes and evolving data regulations? DataIQ's research identifies that 67.9 per cent consider themselves very or somewhat prepared for GDPR, encouragingly up 12.9 per cent since last year. However, when compared to businesses' data quality maturity, this seems slightly optimistic given that only 41 per cent have a mature strategy. The majority (58.9 per cent) are still in the early or reactive stages. This would imply that, perhaps, there is a gap in perception of how ready businesses think they are for GDPR.

When we dig deeper into the statistics from this research, it's not hard to see where businesses are letting themselves down. A large number of companies are still missing data quality fundamentals - with the basic tools, such as the use of data suppression and customer data matching and enhancement services, down year-on-year by over 20 per cent and 10 per cent respectively. With the emphasis that GDPR places on data accuracy, enhancing the rights of individuals to access, correct and delete their personal data, this downward trend is likely to create a compliance gap.

To be able to comply with enhanced data subject rights and increased obligations, such as subject access requests and data portability, organisations will need to consider what measures they can put in place to manage data quality. Businesses should stop thinking of data quality as a nice to have. By ensuring the accuracy of data, standardising and removing duplicates, some companies are already halfway there, but the majority still have a long way to go.

Organisations should think about their approach and focus on moving up the data quality maturity scale quickly in order to meet the regulatory deadline and avoid any penalties. We wouldn't expect all organisations to reach the last stage of maturity, Optimised and Governed, before May 2018 and believe they should more realistically aim to build a proactive maturity strategy (Stage 3) to satisfy the ICO.

While we appreciate GDPR preparation presents a significant hurdle for many businesses, there are also a number of benefits from getting it right aside from just compliance. In fact, unsurprisingly, 69 per cent of businesses cited that, where they made investments in data quality solutions, they have seen a positive return on investment.

We hope you find this paper helpful in understanding changing consumer attitudes, identifying what you need to do to meet these and the implications of the new Regulation. If you want further advice on how your business can plan their data strategy for GDPR, Experian offers a range of service and solutions that can help to support your preparations.



Key findings

Consumer attitudes towards sharing their personal information have become significantly more positive - for every one person who says they prefer not to share (the Cautious, 36 per cent), there are two who are either happy to if the need is explained (the Rational, 42 per cent) or are happy to share if they trust the company (the Trusting, 21 per cent). Last year, half said they would prefer not to share.

Only one in ten consumers (10 per cent) say they are fully aware of a new law that will protect their data and grant them new rights over it. By contrast, six out of ten are only vaguely aware (24 per cent) or not aware at all (38 per cent). Education about GDPR will take some time to shift this position.

Four in ten consumers (40 per cent) now say the information they receive is regularly irrelevant, up from 28 per cent in 2016, while one-third (35 per cent) complain that they are always getting the same information as everyone else - another jump from 22 per cent last year. Duplicates continue to plague consumers - 35 per cent say they get the same information more than once on a regular basis.

Consumer expectations about data accuracy are high - 71.5 per cent say their personal details should be right every time. Only 5.9 per cent will excuse errors if the information they get is relevant.

Just under half of consumers (48 per cent) will tell each company when their data changes, while 23 per cent will tell only some - so organisations can not rely on direct data updates from their customer base.

Checking that data is correct every time a customer uses a service is expected by one-third of consumers (33 per cent), a view likely to place a significant burden on the customer experience. But four in ten (38.1 per cent) say their data only needs to be checked sometimes - a better fit with a good customer journey.

Entering data manually would be acceptable to 45 per cent of consumers, while 40 per cent will use address look-up tables. There is already strong adoption propensity for secure keys (69 per cent), digital IDs (62 per cent) and text verification (54 per cent).

Awareness of GDPR continues to rise among businesses with half (50 per cent) now very conscious

of the new Regulation and 36.3 per cent somewhat aware of it - a combined rise of 7.3 per cent. The proportion who are very prepared has doubled to 14.6 per cent, while the number who are not at all prepared fell sharply from 8 per cent in 2016 to just 1.9 per cent in 2017.

One in six companies (16.5 per cent) now rate themselves as Advanced in their adoption of data and analytics. This is a significant rise since last year although, overall, there has been a slight softening in self-confidence. Perhaps as the full implications of GDPR compliance are realised, so, too, are the gaps in processes and preparedness.

More strategic accountability and funding for data preparation is now visible - in-house legal and compliance is accountable at 40.3 per cent of organisations and funds 19.4 per cent, while the board is accountable at 38.1 per cent and funds 32.1 per cent, and finance is now accountable at 31.3 per cent and funds 19.4 per cent. All of these are significant rises over 2016.

Only 10.5 per cent of organisations have a company-wide KPI for data quality - by contrast, 12.7 per cent say they do not measure it at all. Compliance with GDPR will prove difficult for them to achieve given its focus on accountability.

Uncertainty about permissions for third-party data sharing appears to have placed a chill on using data quality management processes which rely on external sources - suppression service usage fell by 20 per cent and customer data enhancement by 10 per cent year-on-year.

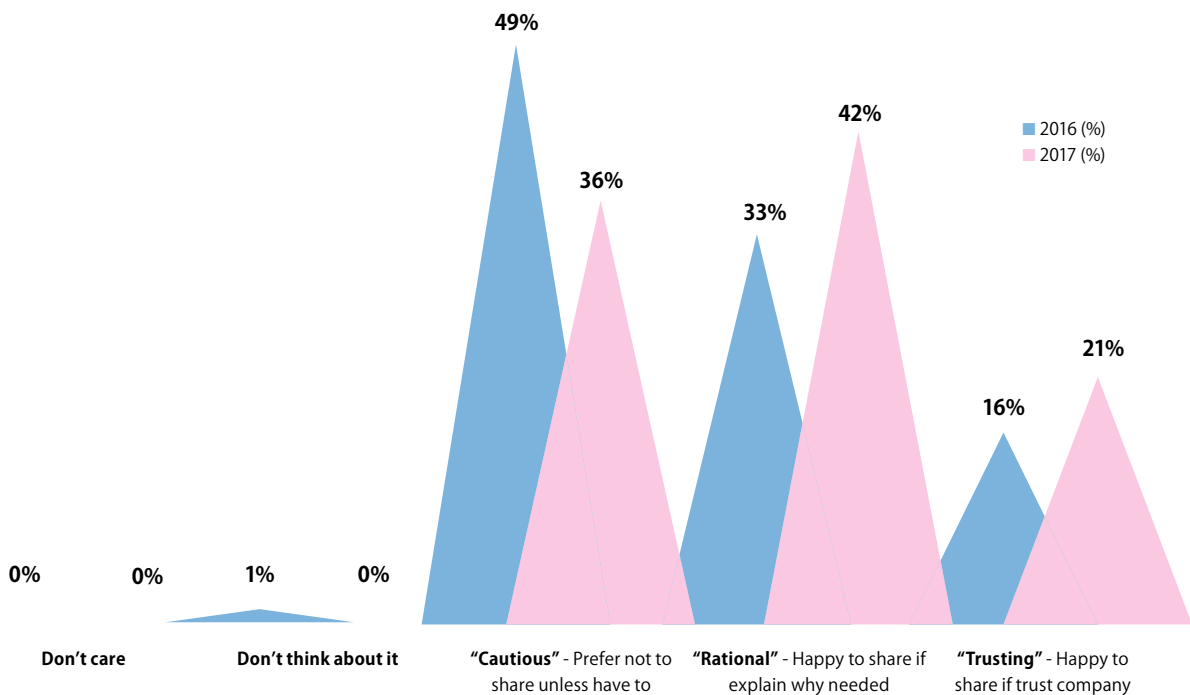
One in eight companies (16.5 per cent) are ahead of GDPR requirements by having a consumer preference centre already in place, with 10.8 per cent considering one. But 12.7 per cent of organisations wait until they receive a subject access request before enabling data corrections.

Half or more organisations say there are six major functions where data quality has a very significant or some impact - marketing (68.1 per cent), sales (64.2 per cent), data management (56.8 per cent), insight and analytics (57.5 per cent), CRM and customer management (56 per cent) and in-house compliance and legal (51.2 per cent).



Section one - Consumers and personal data

1.1 - Consumer attitudes towards sharing personal information



Attitudes towards sharing personal information

With enforcement of GDPR, new rights for consumers will move centre stage. Transparency, consent, control will combine to make the balance of power in the data-value exchange more equal. The good news for organisations that rely on personal information is that, even in the last 12 months, attitudes towards sharing data have become significantly more positive. For every one consumer who prefers not to share personal information, there are now two who are happy to do so in the right circumstances.

Under GDPR, organisations that are unable to make clear their legitimate interest in processing

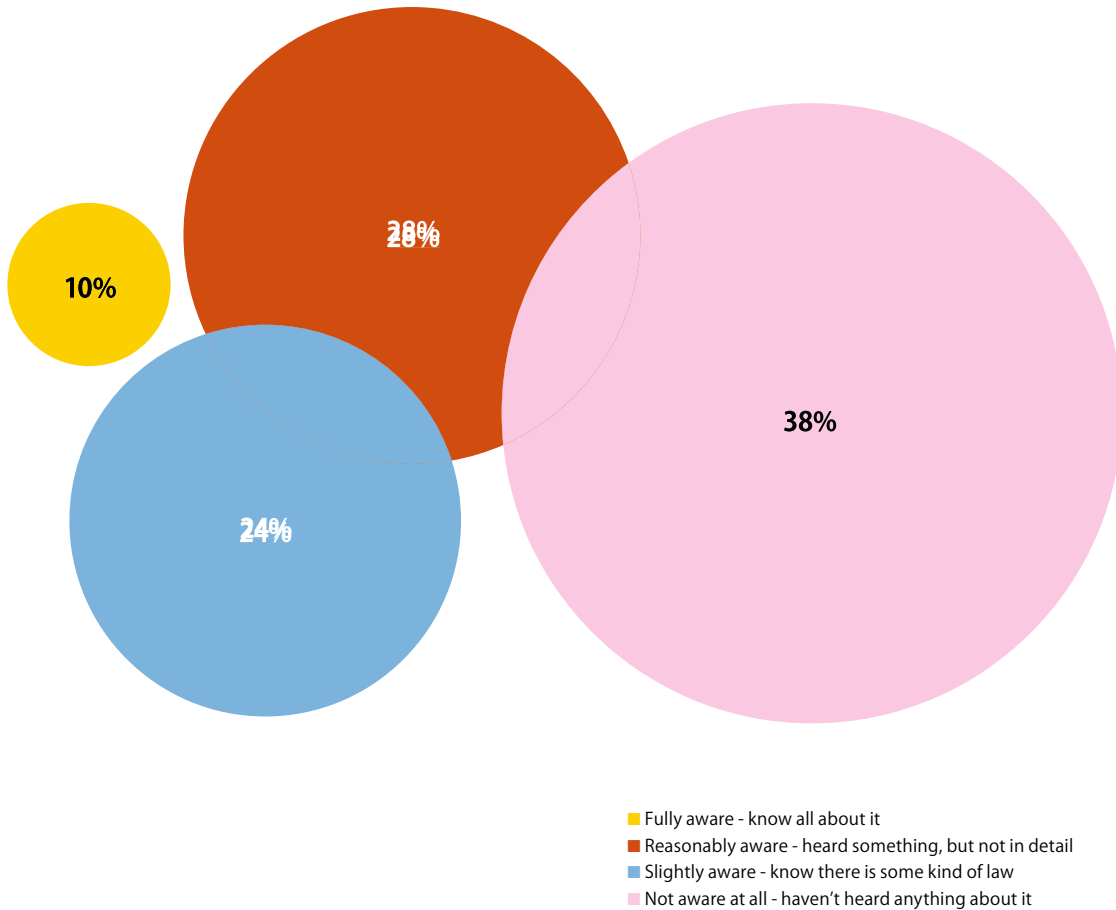
data have to gain informed consent - difficult when half of the population in 2016 (49 per cent) were starting from a position of caution. But by 2017, there has been a 40 per cent drop in the number who hold this attitude, leaving just over one-third (36 per cent) in the Cautious segment.

Two-thirds of those who have changed their minds are now Rational about sharing personal information - 42 per cent will do so if the need is explained, up from 33 per cent last year. One-third have migrated into the Trusting group, creating a 21 per cent segment who are happy to share if they trust the company, up from 16 per cent in 2016.





1.2 - Consumer awareness of data protection law



Awareness of data protection law

For GDPR to have the effect intended by its architects, consumers will need to take advantage of the rights it grants them. That will require awareness and education - but the existing base is currently low, with only one in ten consumers (10 per cent) claiming to be fully aware of a law that protects their data and privacy. Even prompted, only an additional 28 per cent claim a degree of awareness, even if not in detail.

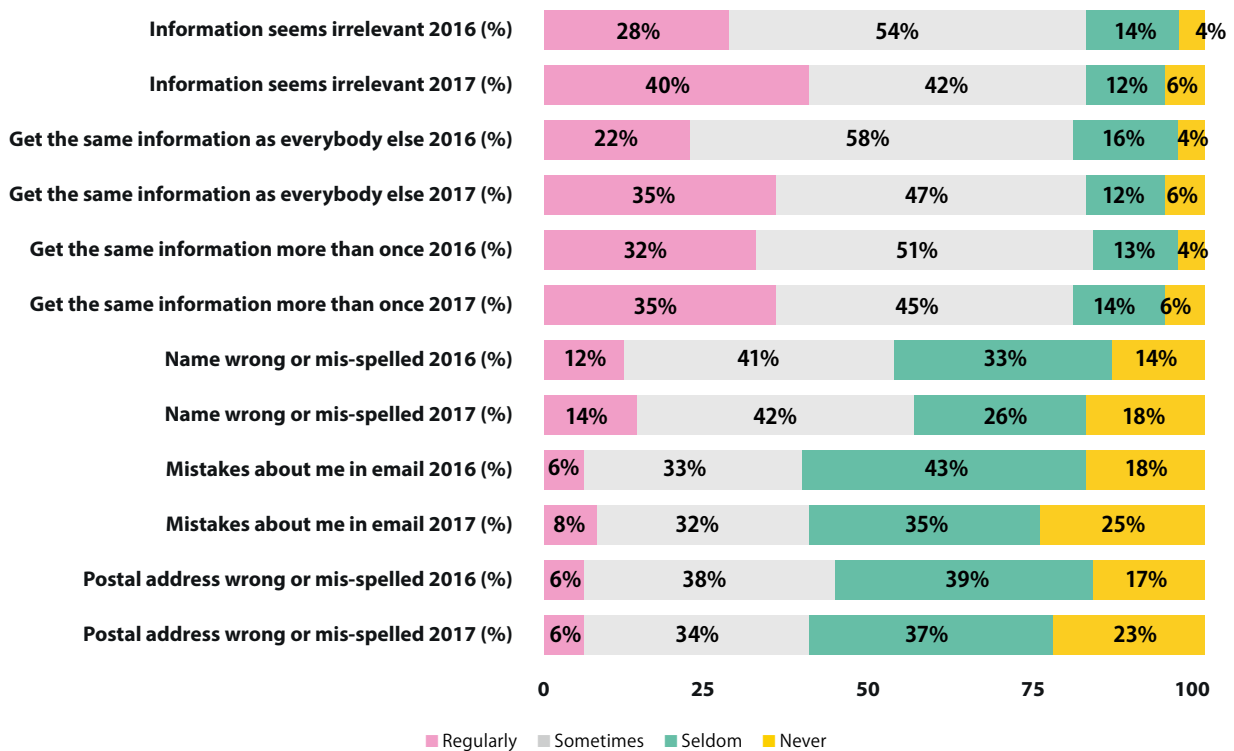
That leaves more than six out of ten consumers with, at best, a vague sense that there is a law protecting them or, at worst, a complete lack of knowledge. The group who haven't heard anything about it is the largest segment at 38 per cent - the same size as all of those with a level of awareness and half as big again as the group with just some knowledge that there is a kind of law (24 per cent).





Section two - Consumers and data preparation

2.1 - Consumers noticing errors in personal information



Errors noticed in use of personal information

Sensitivity around how personal information is used in marketing and communications appears to have grown in the last 12 months. In particular, consumers are noticing issues around relevance more - 40 per cent say the information they receive is regularly irrelevant, a substantial rise over the 28 per cent who mentioned this in 2016 when it was only the third commonest problem identified, rather than the first. Getting the same information as everybody else is now a regular experience for 35 per cent, up from 22 per cent. Assuming that companies have not significantly detuned their targeting, this reflects a new desire for a more visible and effective data-value exchange.

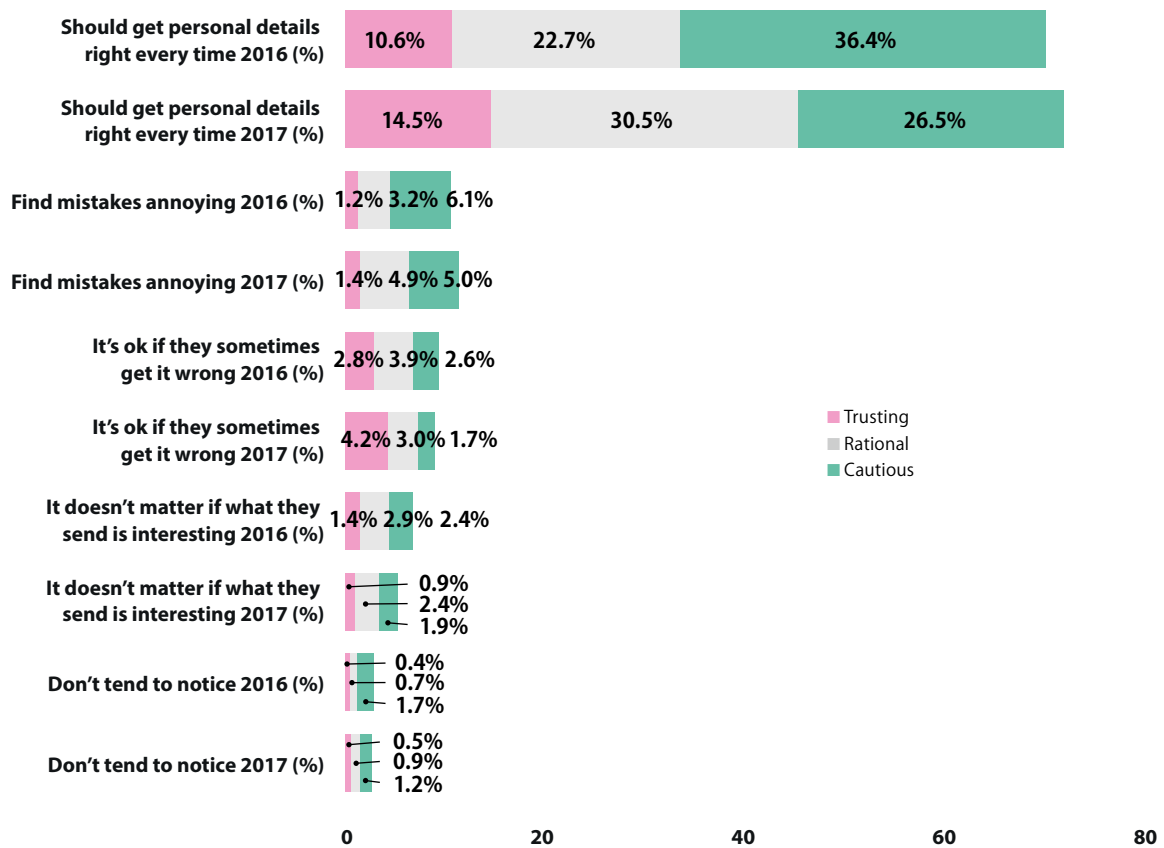
This flips around the expectation from the previous view that avoiding mistakes was the key issue. Last year, the commonest error was regularly or sometimes getting the same information (82 per cent combined) - a failure in deduplication by companies - whereas this now only ranks third with 79 per cent of consumers regularly or sometimes noticing duplicate messages.

Grounds for optimism that data quality has improved overall (even if targeting has got worse) can be found in the factor that one quarter of consumers never see mistakes about themselves in emails (25 per cent) or have their postal address wrong (23 per cent).





2.2 - Consumer expectations of personal information accuracy



Expectations about accuracy of personal information

Relevance may be at the heart of the data-value exchange, but it does not give companies a free pass when it comes to the accuracy of personal information. Just 5.9 per cent of consumers excuse errors if what they receive is interesting and this is a drop from 6.7 per cent last year.

Instead, 71.5 per cent expect their personal details to be right every time they are contacted, up from 69.7 per cent. It is significant that this view has risen most strongly among the Rational group who are happy to share their data if given a good reason - with a third

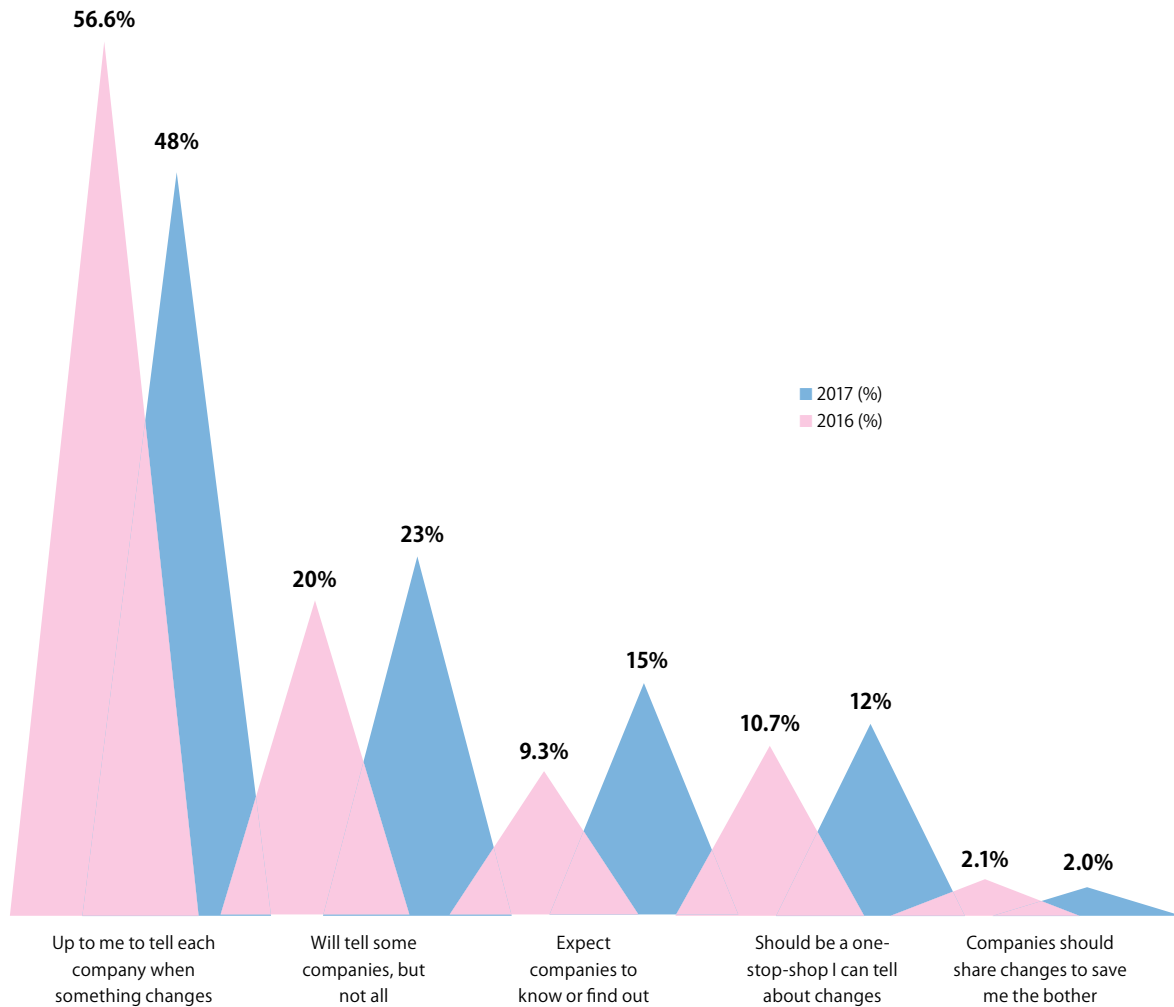
more anticipating error-free contact, it would seem that good data preparation has to be part of that rationale.

Similarly, there are half as many more Trusting consumers who want their data to be accurately used all the time compared to last year - only the Cautious have reduced expectations and this may be a reflection of their more pessimistic view of the exchange and its outcomes. Barely any consumers fail to notice data errors, making it clear that good data preparation is at the core of building good customer relationships.





2.3 - Consumers and responsibility for keeping data up-to-date



Responsibility for keeping data up-to-date

Maintaining personal information and keeping it up-to-date has always been a requirement of data protection law and continues to be so under GDPR. What is new, however, is the way this can be done with a widespread view that online control centres will become essential. If they do, then consumer adoption of this data correction opportunity may turn out to be patchy.

Although half (48 per cent) say it is up to them to tell each company when something changes, this has fallen from 56.6 per cent last year. At the same time, nearly a quarter (23 per cent) now say they will tell some

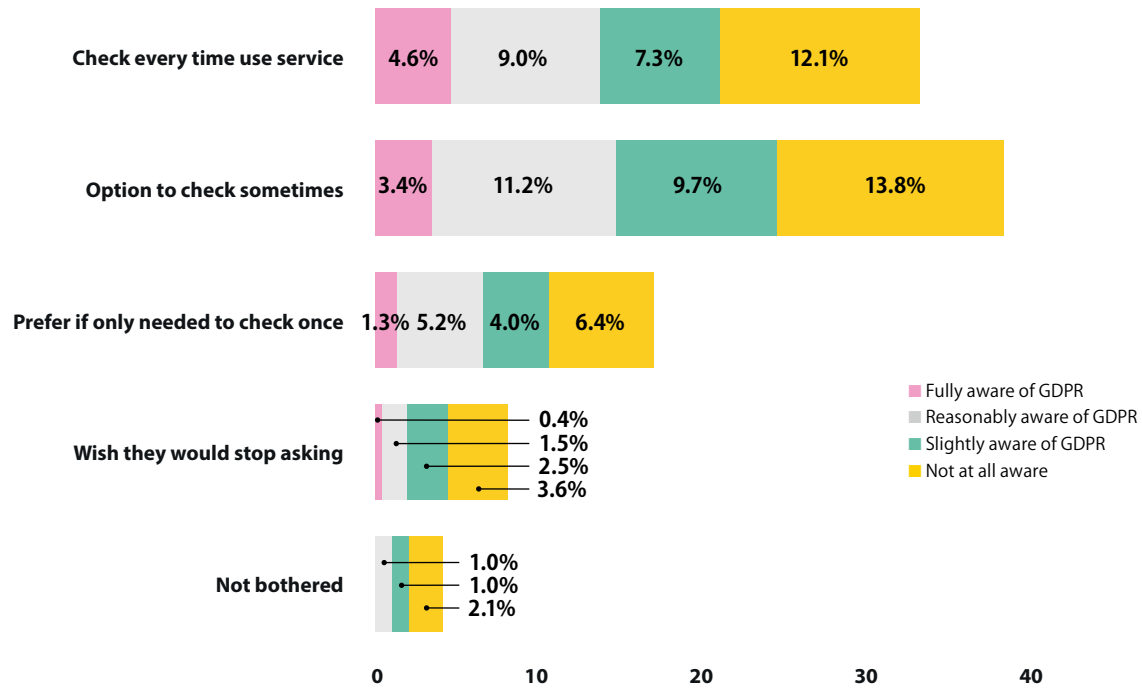
companies, but not all. Again, this has risen since last year when it stood at 20 per cent. So organisations will not be able to rely on being told directly by customers if their personal data changes.

Better news is a move towards seeing organisations as having the responsibility (up to 15 per cent from 9.3 per cent) or wanting a one-stop-shop to tell (now 12 per cent from 10.7 per cent). What has not changed is the attitude towards sharing data, even when it is about changes of address or similar alterations. Only one in fifty consumers say this is acceptable.





2.4 - Consumer preferences for checking data accuracy



Preferences for checking if personal information is correct

The best person to ask about the accuracy of their data is usually the individual concerned. A balance needs to be struck, however, between ensuring a record is up-to-date and keeping the customer experience smooth and productive. One-third of consumers (33 per cent) would prefer that organisations check with them every time they use a service. Introducing this step into each interaction would potentially slow down whatever transaction or service use was being undertaken, however.

Nearly four in ten consumers (38.1 per cent) would prefer that this data preparation process was an occasional part of their engagement with companies. That is more likely to fit with the optimal customer experience and also the relative dynamism of personal

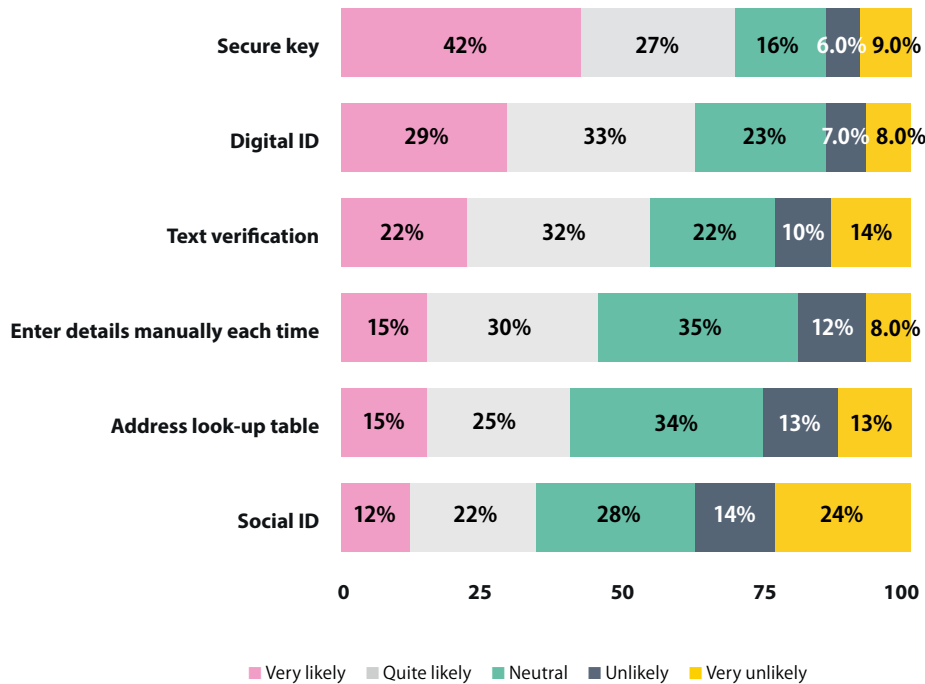
data which is not changing for every consumer every time. The balance between useful and intrusive data quality processes can be read in the desire of 16.4 per cent of consumers to only have their data checked once - still on the positive side of the balance - whereas 6.1 per cent are already irritated by the frequency of checks.

What is particularly significant is that the desire for routine data checking rises in correlation with awareness of GDPR. Among those who are fully aware, more would prefer this frequency than any other. Among those with less awareness, however, the preference is for occasional checks. As public education on GDPR increases, it seems likely that the desire for constant checking of personal information will grow, too.





2.5 - Consumer adoption of personal information and identity services



Likelihood to use services to manage personal information or identity

New services based around personal information and identity management will emerge from GDPR programmes as a way of driving value out of the new processes involved. New threats to data security have also required a response from data controllers. One of these is the use of a secure key for online banking - consumer adoption seems likely to grow rapidly with 69 per cent already saying they are very or quite likely to use one.

Government-driven online identity management services will also break out in the short term and 62 per cent of consumers are positive towards this. A small majority (54 per cent) are also likely to adopt text verification, although one quarter of consumers (24 per cent) say they are unlikely to do so. The greatest

resistance is towards a service which is already in widespread usage by digital marketers - social ID is already marginally negative with 34 per cent very or quite likely to use it, but 38 per cent unlikely or very unlikely to do so.

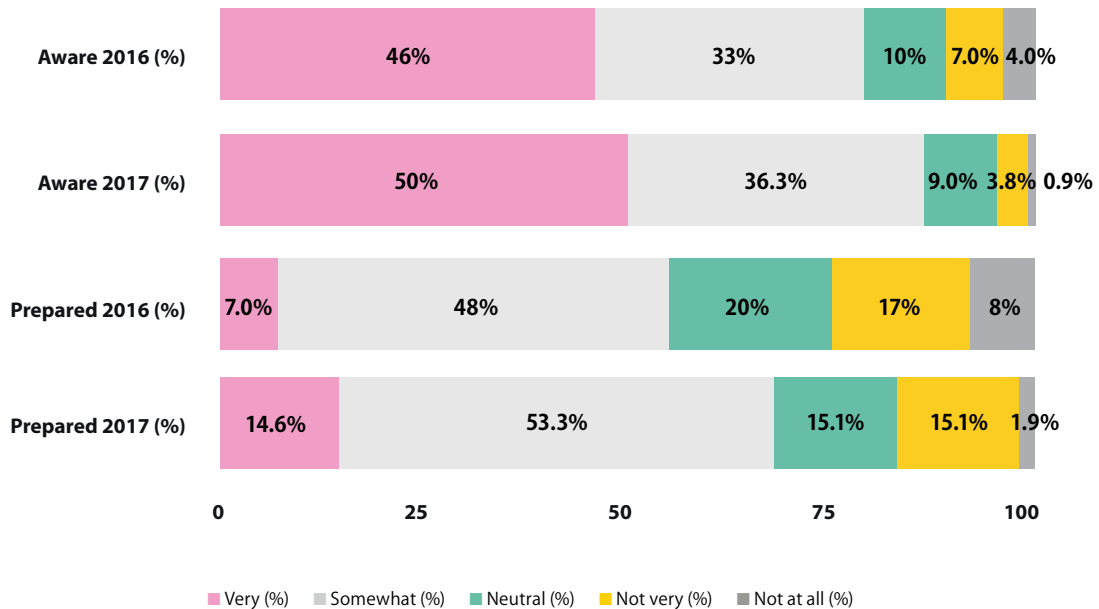
More established and manual processes may lag behind these newer technologies, but they still enjoy a positive consumer adoption rate. Manual data entry is welcomed by 45 per cent, with just 20 per cent negative, while address look-up tables are likely to be used by 40 per cent, compared to 26 per cent who would not. Even with GDPR, that means many online processes will not need to be heavily reconfigured, but can benefit instead from enhanced security services.





Section 3 - Businesses and personal data

3.1 - Awareness and preparation for GDPR



Awareness and preparedness for GDPR

In the year since DataIQ last surveyed companies about their awareness of GDPR, there has been a modest increase in the numbers saying they are very aware (50 per cent) or somewhat aware (36.3 per cent) of the new law. While encouraging, if this rate of change remains constant, there will still be around 6 per cent of companies who have no idea that the way they handle personal information is about to change by the time enforcement starts.

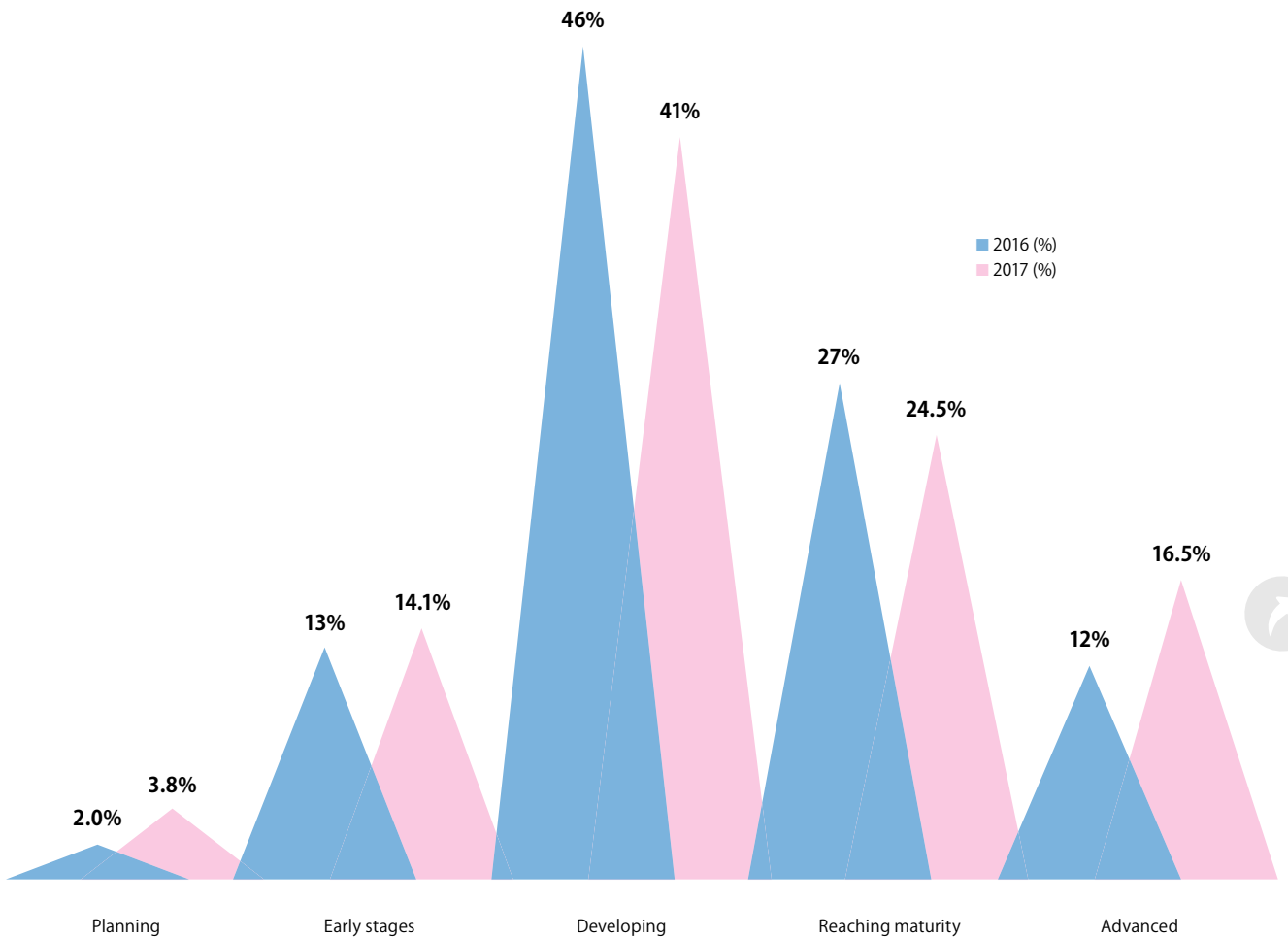
More encouraging is the pace at which preparations

for the Regulation are being undertaken. The number of companies who are very prepared has doubled to 14.6 per cent, while 53.3 per cent are now somewhat prepared. Perhaps most significant is the steep fall in those who are not at all prepared, which now stands at just 1.9 per cent, down from 8 per cent in 2016. It is to be hoped that this pace of change will accelerate over the coming 12 months until there are no UK businesses who have not got themselves ready for the new legal framework.





3.2 - Maturity level of data and analytics



Adoption of data and analytics

The ability of organisations to adapt to GDPR is in part a reflection of their level of maturity in the adoption of data and analytics. Four out of ten place themselves either in the advanced segment (16.5 per cent) or reaching maturity (24.5 per cent). Although this number has not significantly changed overall since 2016, it is notable that more programmes have now reached full maturity, placing one in six organisations into the leading group.

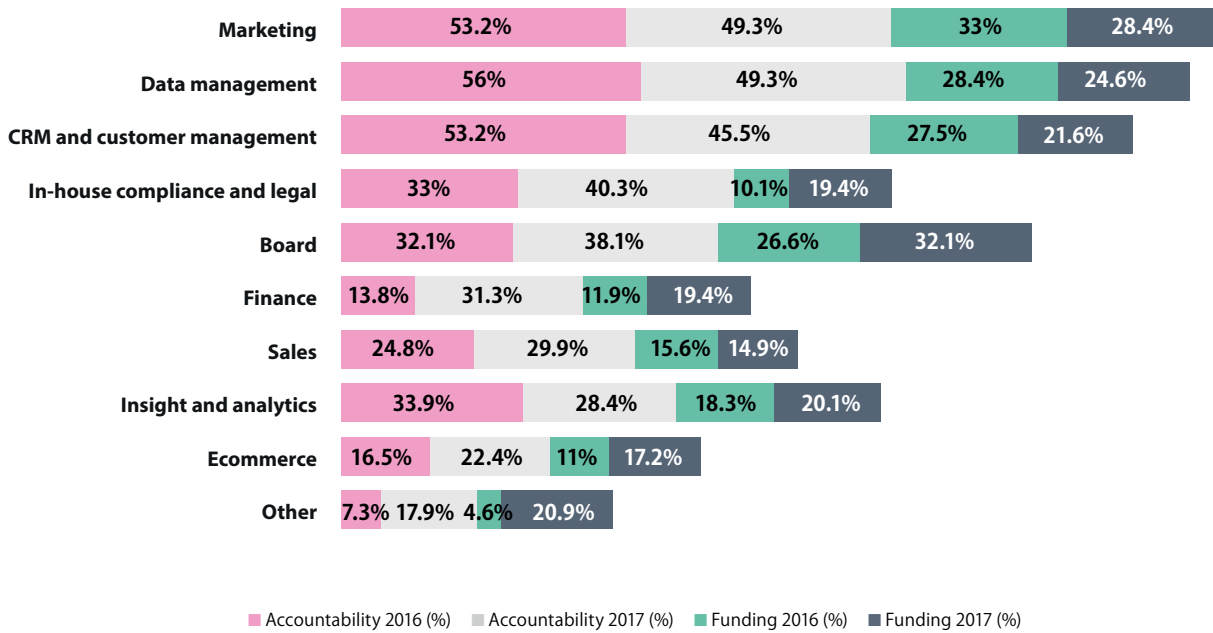
By contrast, almost the same proportion find themselves still on the launch pad with 3.8 per cent planning - nearly double the number found last year - and 14.1 per cent in the early stages - up slightly on 2016. For these organisations, the time remaining until GDPR starts to be enforced is likely to be a rush to understand and master the personal data they are relying on, with a strong potential to fail given the short timescale.





Section four - Businesses and data preparation

4.1 - Functions responsible for and funding data preparation



Functions responsible for and funding data preparation

As enforcement of GDPR gets closer, its implications for the whole enterprise are starting to be realised more widely. The range of functions who are involved with personal data is broad which makes data preparation an issue for departments far beyond those directly handling personal information.

A notable shift between 2016 and 2017 is the increase by nearly a third in the number of organisations who say in-house compliance and legal are accountable (up to 40.3 per cent from 33 per cent), while the number saying their board is accountable has also risen to nearly four in ten (38.1 per cent up from 32.1 per cent). But it is finance which has grown most, more than doubling its involvement to 31.3 per cent from 13.8 per

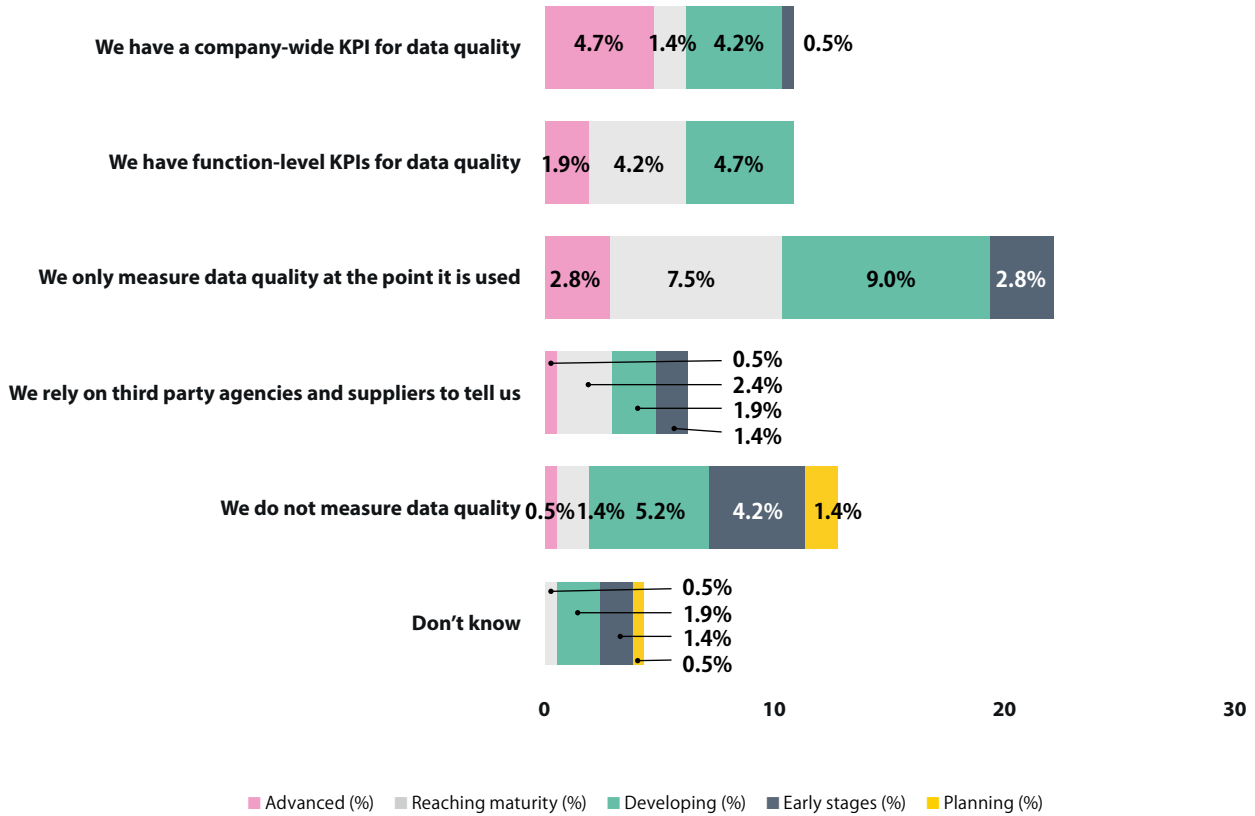
cent. This shows the strategic value of personal data and how this is now recognised.

When it comes to funding data preparation, this strategic shift is even more visible - boards are now the number one source, with 32.1 per cent naming it compared to 26.6 per cent last year, outstripping other long-term, customer-facing funders such as marketing (28.4 per cent) and CRM (21.6 per cent), or functions with a direct role in handling personal data such as data management (24.6 per cent) and insight and analytics (20.1 per cent). In-house and compliance has nearly doubled its financial backing to 19.4 per cent from 10.1 per cent, with finance seeing a nearly similar growth to 19.4 per cent from 11.9 per cent.





4.2 - How companies measure data quality



Measuring data quality across the organisation

Accountability for personal data is a big aspect of GDPR and will push responsibility up the management chain. With data quality, the 10.5 per cent of organisations who already have company-wide key performance indicators are best placed to align the accuracy of their customer records with their compliance programmes.

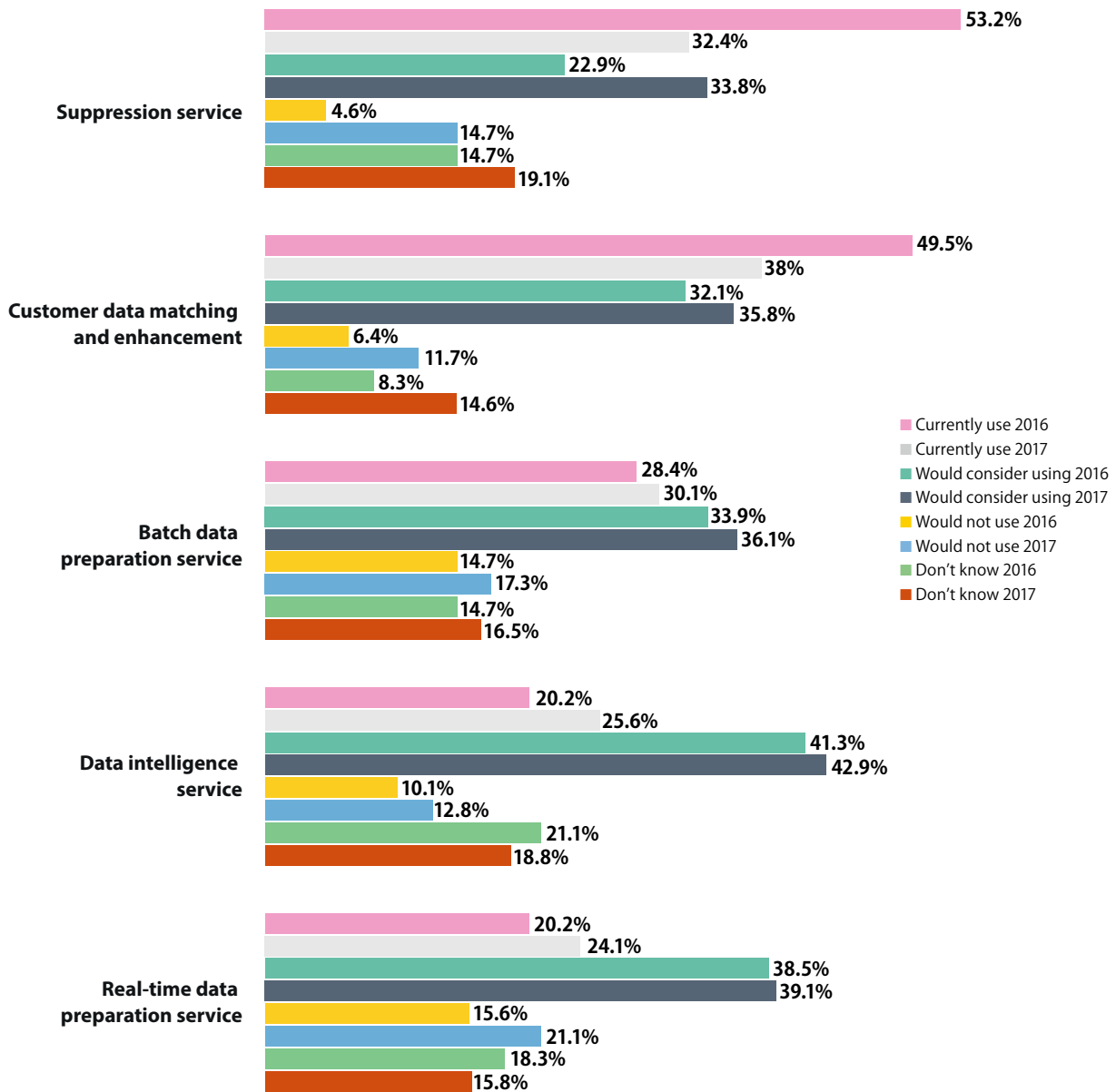
This is where those organisations who are advanced in their adoption of data and analytics have a very clear lead as they make up nearly half of the group using company-wide KPIs. A good building block has also been put in place by the 10.8 per cent who measure data quality at function level. For them, the next challenge is to roll these metrics up to a fully-strategic level.

But nearly one quarter of organisations (22.1 per cent) only measure their data quality at the point of use, with those reaching maturity in their adoption surprisingly making up one-third of this group. Taking this approach means plans may have been made based on assumptions about data quality which are wrong and could therefore undermine the success of activities, like marketing campaigns. While 12.7 per cent rely on third parties, such as agencies, to tell them when this happens, some measure of quality has to be better than none, which 12.7 per cent say is their position, or just not knowing (4.3 per cent). Compliance with GDPR will be difficult in the absence of any insight into data quality.





4.3 - Usage of data quality management processes



Data quality processes used and considered

Uncertainty about the sharing of personal data with third parties under GDPR appears to have had a chilling effect on the use of key data quality management processes (a trend which other DataIQ has identified). Suppression services and customer data matching and enhancement - both dependent on running customer data against a third-party file - saw the claimed level of usage fall year-on-year by over 20 per cent and 10 per cent respectively.

This is reflected most strongly in the growth of those saying they would not use these services -

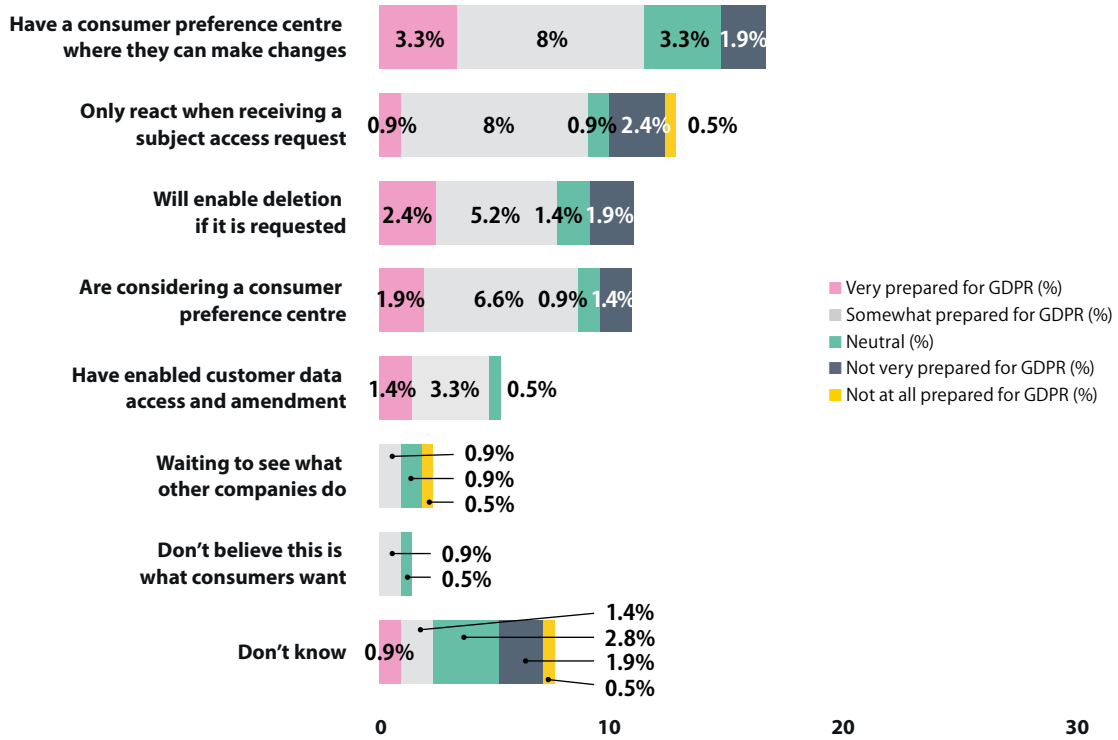
suppression is ruled out by 14.7 per cent, up from 4.6 per cent last year, while 11.7 per cent would not use customer data enhancement, up from 6.4 per cent in 2016.

With the emphasis that GDPR places on data accuracy, enhancing the rights of individuals to access, correct and delete their personal data, this step away from third-party data quality services looks set to create a compliance gap, especially as those third parties have been working hard to ensure their offerings are compliant.





4.4 - Enabling consumer access and amendment rights



Providing access and amendment rights to individuals

One of the major objectives of GDPR is to rebalance the data-value exchange towards individuals, especially through granting them new rights over their personal data and enhancing those which already exist. Providing a consumer preference centre where individuals can make changes is therefore a big step towards compliance and one which 16.5 per cent of organisations have already taken and which a further 10.8 per cent are considering.

It is notable that this service is not restricted to companies who say they are very prepared for GDPR,

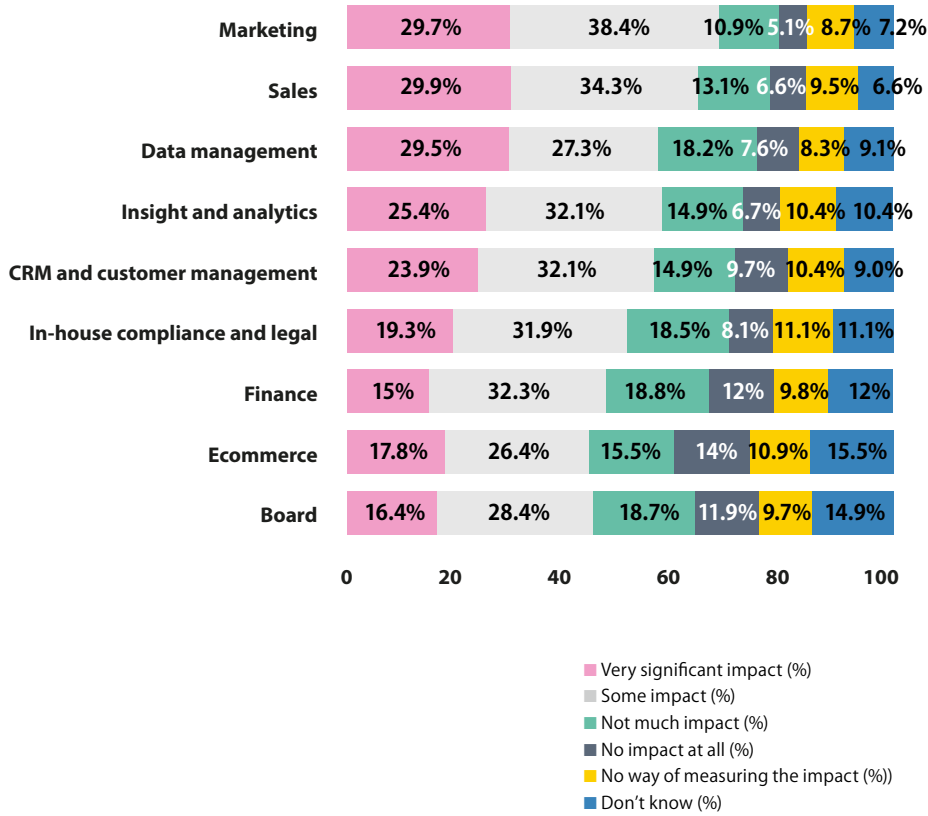
but can be found across the board. On top of this, 5.2 per cent have already enabled data deletion on request ahead of the new right to be forgotten being enforced.

At the other end of the spectrum, 12.7 per cent of organisations are purely reactive, waiting until they receive a subject access request. A small number (2.3 per cent) take this even further by waiting to see what other companies do, while 1.4 per cent even argue that access and amendment is not what the consumer wants. Be that as it may, the new rights are coming and companies need to get ready.





4.5 - Impact of data quality on functions across the company



Data quality impact across the company

Use of personal data is now so endemic within business processes that six key functions are identified by half or more of organisations as being significantly impacted by data quality problems. Three of these are customer-facing as might be expected - 68.1 per cent see very significant or some impact on marketing, 64.2 on sales and 56 per cent on CRM and customer management. Surprising, only 44.2 per cent see this level of impact on ecommerce, despite its one-to-one interactions with individuals.

The other three functions which suffer from poor quality data are those which process it - data and

management, where 56.8 per cent see very significant or some impact, as well as insight and analytics (57.5 per cent) - while the in-house function charged with ensuring compliance experiences this level of impact at 51.2 per cent of organisations. Even finance is recognised as suffering from significant data quality problems at 47.3 per cent of companies and in the board at 44.8 per cent. One in ten organisations say they have no way of measuring what impact data quality has - a difficult position to maintain once GDPR is being enforced and the regulator is looking for evidence that personal data is being kept according to the rules.





About Experian

In a world built on data, we help people maintain the accuracy of their data, reduce errors, and avoid additional costs or risks associated with poor quality data. Our data quality management tools and services enable confident use of data as a strategic asset. Whoever you are, we want to help you unlock the real value of your data to make meaningful decisions.

Experian Data Quality - combining data, technology and insight to create a better tomorrow.

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About DataIQ

DataIQ aims to inspire and help professionals using data and analytics intelligently to drive business performance across their organisation and in every industry sector.

Specifically, DataIQ helps business professionals to understand the benefits of adopting data-driven strategies, develop compelling business cases, implement best practice, ensure they comply with data regulation, and understand how to use the latest tools and technology to deliver sustained business improvement.

DataIQ achieves this by providing essential insight, help and know-how from proprietary research, analysis, best practice and comment from industry leaders and data experts. All made easily available through high-quality events and digital channels.

Our unique community of business decision-makers and influencers - working across functions in FTSE 100, large and mid-market organisations - is growing rapidly as a consequence of this unique focus. Importantly, DataIQ provides the bridge for ambitious vendors, agencies and service providers to influence this hard-to-reach and unique community.

DataIQ is committed to championing the value of data-driven business and best practice through focusing on the success stories of data-driven professionals with initiatives including the DataIQ 100 and DataIQ Talent Awards, plus many other events and programmes. We contribute actively to trade and government bodies, including the DMA, IDM, PPA, techUK and UKTI.

For the latest information on how DataIQ can help your organisation go to www.dataiq.co.uk.

For information on how to become a commercial partner to DataIQ, call Adrian Gregory or Adam Candlish on +44 (0)20 3829 1112 or email adrian.gregory@dataiq.co.uk and adam.candlish@dataiq.co.uk

Methodology

Research for this series of whitepapers was carried out in two parts. Consumer research was commissioned by DataIQ from Research Now in both 2016 and 2017 among an online panel representative of the UK population. All respondents were aged over

18, UK residents and were served a self-completion questionnaire during February 2017. A total of 1,001 surveys was completed in 2017 and 1,000 in 2016. Business research was conducted in two parts in 2017. A self-completion questionnaire was served to members

of the DataIQ community and also to decision-making marketers in an online panel operated by Research Now. A total of 212 responses was generated during February 2017. For the 2016 survey, DataIQ surveyed only its own community during April, generating 187 responses.