dataIQ™
Research report

01

MOBILE AND DIGITAL

GDPR IMPACT SERIES 2018

IDENTIFYING ITS IMPACT ON MARKETERS AND THE CONSUMER'S MOMENT OF TRUTH

In association with

TEALIUM

Contents

Overview

2018 sees the long-awaited General Data Protection Regulation (GDPR) enter into enforcement from 25th May. After six years of lobbying, discussion and preparation, all organisations involved in the processing of personal information on European Union citizens will need to comply. It is a once-in-a-lifetime change to the legal basis on which individuals share their data with organisations.

DataIQ undertook twin-track research in the UK to examine how consumers expect their data to be used and whether they intend to exercise their new rights, as well as into what organisations intend to do to bring their data-driven practices into line with the Regulation. 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: mobile and digital (the issues specific to those channels), relevance and accuracy (how data should be kept up-to-date), readiness (how consumers and businesses are preparing for GDPR) and regtech (how technology can support GDPR compliance). 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 Tealium. It looks into the how aware consumers are of the way data is collected from their mobile and digital footprint, as well as how businesses rely on these data streams to deliver personalised services and a better customer experience.

MOBILE AND DIGITAL

01

Sponsor's comment

Lindsay McEwan,
VP and managing director EMEA, Tealium

The number of consumers who are happy to share their data with a trusted company has doubled in the past two years - a clear indication that awareness of the GDPR is growing. This is just an example of the insights discussed in the latest GDPR Impact Series report, produced by DataIQ with support from Tealium.

Ahead of the Regulation coming into effect in May, this research explores the relationship between GDPR, marketers and consumers. This change to the legal framework for data sharing is a big shift in the status quo.

The GDPR Impact Series research will help businesses to interpret consumers' perspectives on data collection and consent, as well as help marketers to deal with the challenges in adjusting to the new Regulation and to identify differing viewpoints on the data exchange.

This report provides a benchmark to determine how prepared a business is for GDPR compared with the broader market. Companies will also gain insights into research detailing just how much GDPR will impact their customers.

Whether you view data as the new oil or as the beginning of the fourth industrial revolution, its relevance in today's world is hard to deny. The month of May will mark the dawn of a new era that will see our relationship with data heavily scrutinised.

By laying the groundwork now, businesses will be able to embrace fully the opportunities presented by GDPR and this research takes us one step closer to a more comprehensive understanding.

Sponsored by **TEALIUM**®

Key findings

- The number of consumers who say they are happy to share their data if they trust the company ("Trusting") has nearly doubled between 2016 and 2018, from 16 per cent to 30 per cent. At the same time, the number who prefer not to share ("Cautious") has fallen from nearly half (49 per cent) to one third (32 per cent).

- Six out of ten consumers now say they are aware - either fully or somewhat - of a new data protection law. This has reversed the position from last year when six out of ten said they were either only slightly aware or had heard nothing about it.

- Consumers who are Trusting are 2.5 times more likely to see no problem with the use of cookies to track them and have half the likelihood of avoiding opting-in.

- Three out of ten consumers appear unaware of any way in which their mobile and digital experience is data-driven, suggesting organisations need to make the data-value exchange clearer in order to sustain data flows and permission.

- Overall, consumers have a positive view of their mobile and digital experiences with the highest level of likes being scored by convenience (like autofill), interest-based content and offers or loyalty-based pricing.

- Having a choice is the critical issue for one third of consumers when it comes to personalisation in mobile and digital channels, with half of all consumers welcoming data-driven personalisation in digital channels and four in ten holding the same view towards mobile channels.

- More consumers expect their experience to be different on each device (25 per cent) than expect their personal information to be used across all of their devices (21 per cent). Among those with a Trusting attitude, this view is even higher at 30.9 per cent (although exactly matched by the number who are in favour of cross-device tracking).

> "*More consumers expect their experience to be different on each device*"

- Virtually every organisation in the UK is very or somewhat aware of GDPR, with a significant increase in those most aware from 46 percent in 2016 to 84.3 per cent in 2018. One quarter (25.4 per cent) are now very prepared with a further 61 per cent somewhat prepared, up a combined 30 per cent since 2016.

- As awareness and preparation for GDPR has risen, so has maturity in the adoption of data and analytics - 62.7 per cent of organisations now place themselves in the upper two quintiles of Managed or Optimised, up from 39 per cent in 2016.

- The engagement surface between brands and consumers is wide and diverse, presenting multiple opportunities to capture personal information and the appropriate permission to process it. Even so, conventional channels continue to dominate with eight out of ten organisations feeding their data needs via a desktop website, but only half this number have optimised for mobile.

- The more ready a brand is for the arrival of GDPR enforcement, the more likely it is to adopt direct tag management - 62.5 per cent of those who are very prepared and 58.1 per cent those somewhat prepared are using first-party content tags, compared to an overall average of 46.4 per cent.
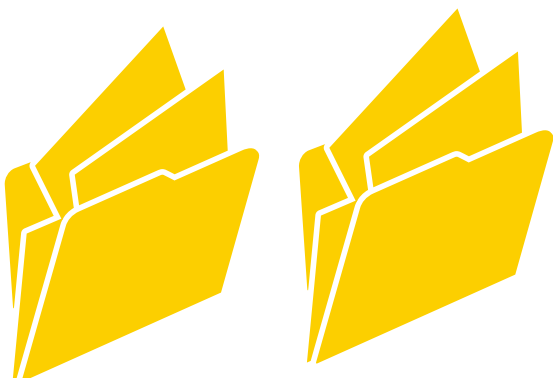
- Integrating all sources of customer data delivers against a number of key requirements of GDPR such as access, correction and portability. Three in ten companies that are very or somewhat prepared for GDPR already have a common identifier in place which enables this integration, compared to none among the other three levels of preparedness.

- Deploying tracking data into key processes is closely correlated with being ready for GDPR - these brands have the widest set of use cases - whereas those organisations who are less or not at all prepared only have limited use cases.

- Marketing performance is the most common benefit seen from tracking data across all organisations. but those firms who are very prepared for GDPR make more use of data trackers for customer experience and product design than anything else (17.6 per cent) - this is an advanced analytical approach that can yield substantial commercial gain.

"Organisations that are very prepared for GDPR are twice as likely as the average to make extensive use of tracking data"
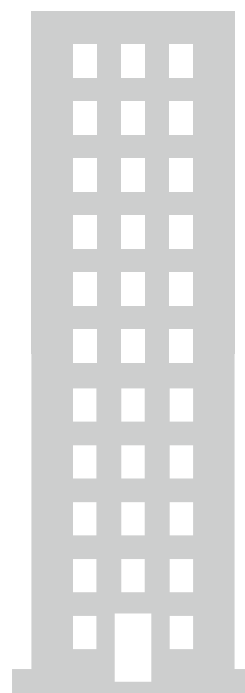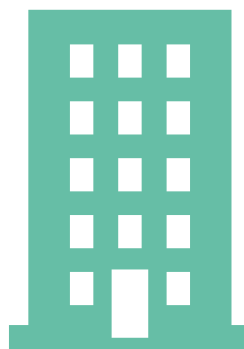
- Organisations that are very prepared for GDPR are twice as likely as the average to make extensive use of tracking data, but the majority of firms who have data from trackers are either only making limited use of it or none at all.

Section 1 - Consumers and personal data

1.1 - Consumer attitudes towards sharing personal information 2016 - 2018

Attitude	2016 (%)	2017 (%)	2018 (%)
"Trusting" - Happy to share if trust company	16.0	21.0	30.0
"Rational" - Happy to share if explain why needed	33.0	42.0	38.0
"Cautious" - Prefer not to share unless have to	49.0	36.0	32.0
Don't think about it	1.0	0.0	1.0
Don't care	0.0	0.0	0.0

■ 2016 (%) ■ 2017 (%) ■ 2018 (%)
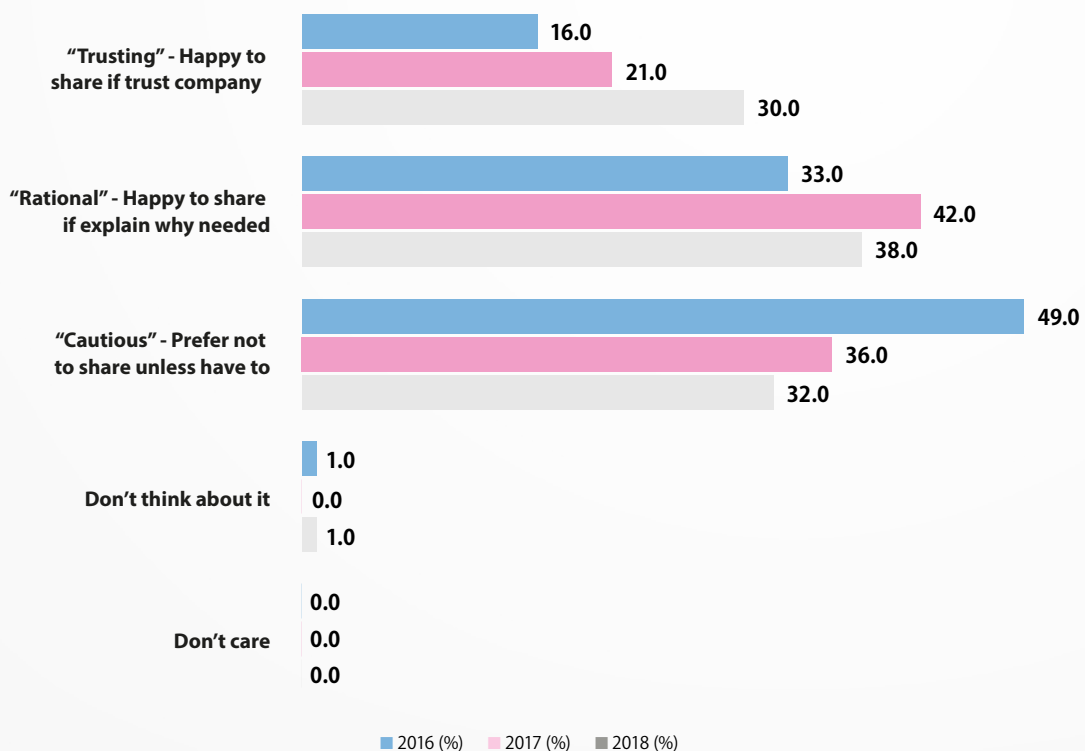
Trust is growing between consumers and companies who ask them to share their personal information. In fact, there has been a near doubling between 2016 and 2018 in the number of individuals who are happy to share if they trust the company. This is highly encouraging for organisations as they enter the new era of data collection under GDPR.

By contrast, consumers who are cautious about sharing data and prefer not to unless it is necessary have reduced significantly in number. Where two years ago they made up half of the adult population, now they are just one third.

Now, the largest attitudinal group is of those who want an explanation of the need for their data and will share if this is provided. This rational view is perfectly aligned to GDPR's requirement for transparency and a balancing of the relationship between consumers and brands.

1.2 - Consumer awareness of data protection law

38.0

35.0

28.0

25.0

20.0
20.0
24.0

10.0

Not aware at all - haven't heard anything about it

Slightly aware - know there is some kind of law

Reasonably aware - heard something, but not in detail

Fully aware - know all about it

■ 2017 (%)   ■ 2018 (%)
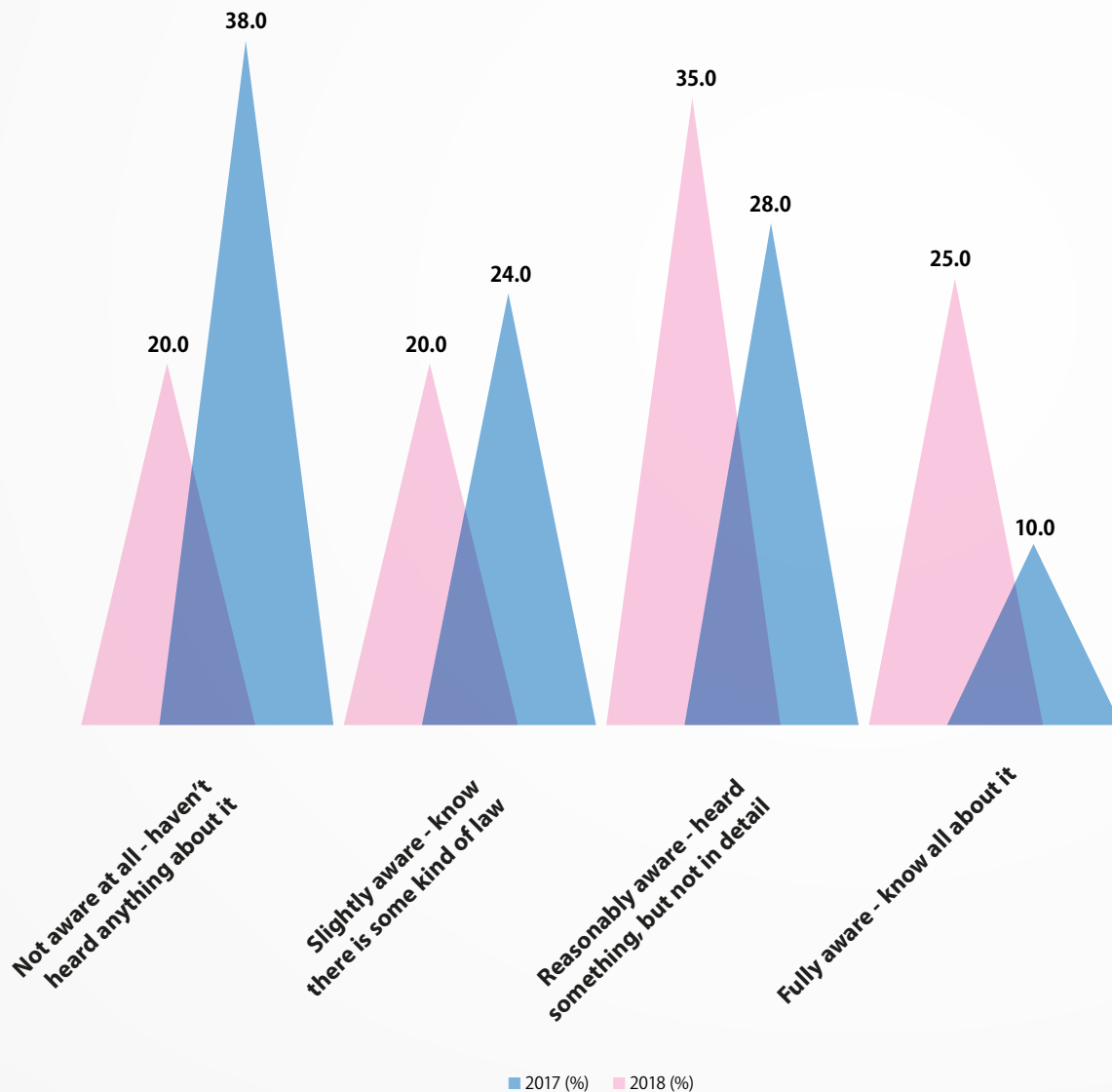
Awareness of a law to protect personal data has completely flipped - where last year six out of ten consumers had only a vague or non-existent idea that it existed, now six out of ten have a positive level of knowledge. Even though active promotion of GDPR has yet to start, messages about a change in the law have clearly filtered through.

Now, one quarter of consumers say they are fully aware, a dramatic rise of 150 per cent year-on-year. At the same time, those claiming to be completely unaware have nearly halved in number. This creates a good foundation for organisations to engage in a dialogue with their customers around data since consumers who already now about the law are more likely to give informed consent.

Section 2 – Consumers and their mobile and digital data

2.1 - Consumer attitudes towards mobile and digital tracking

	Not a problem - they need to know	Ok as long as they tell me and have a choice	Rather they didn't and avoid opting-in	Avoid sites and apps that do this	Haven't really thought about it	Don't know
All (%)	8.0	46.0	30.0	8.0	5.0	3.0
Trusting (%)	19.3	50.8	17.9	3.3	5.6	3.0
Rational (%)	3.9	49.6	34.0	5.5	5.0	1.8
Cautious (%)	3.1	37.7	35.8	13.2	5.7	4.4

■ Not a problem - they need to know
■ Ok as long as they tell me and have a choice
■ Rather they didn't and avoid opting-in
■ Avoid sites and apps that do this
■ Haven't really thought about it
■ Don't know

The rational attitude among all consumers is clearly demonstrated by their views one being tracked when they use mobile apps and web sites - nearly half are ok with this as long as they are told and have a choice. Those who describe themselves as Cautious, however, score below average for this attitude and above average for the one that typifies their outlook - that they would rather not be tracked and avoid opting-in.

But what is most striking is the impact that trust has. Consumers in the Trusting group are 2.5 times more likely to see no problem with the use of cookies to track them and have half the likelihood of avoiding opting-in. This shows what a powerful force trust can be to encourage data-driven engagement. But it is worth noting how few consumers in the Rational and Cautious groups see no problem with being tracked - winning them over will require effort.

2.2 - Consumer experience of mobile and digital data-driven services

Category	Digital (%)	Mobile (%)
Site/app aware of location	45.0	48.0
Site/app reflects interests	43.0	40.0
Ads on sites/apps follow me	36.0	33.0
Site/app welcomes back without log-in	33.0	30.0
Site/app shows different content to family or friends	28.0	25.0
Prices are different to family or friends	20.0	17.0
Don't know	28.0	31.0

■ Digital (%)   ■ Mobile (%)
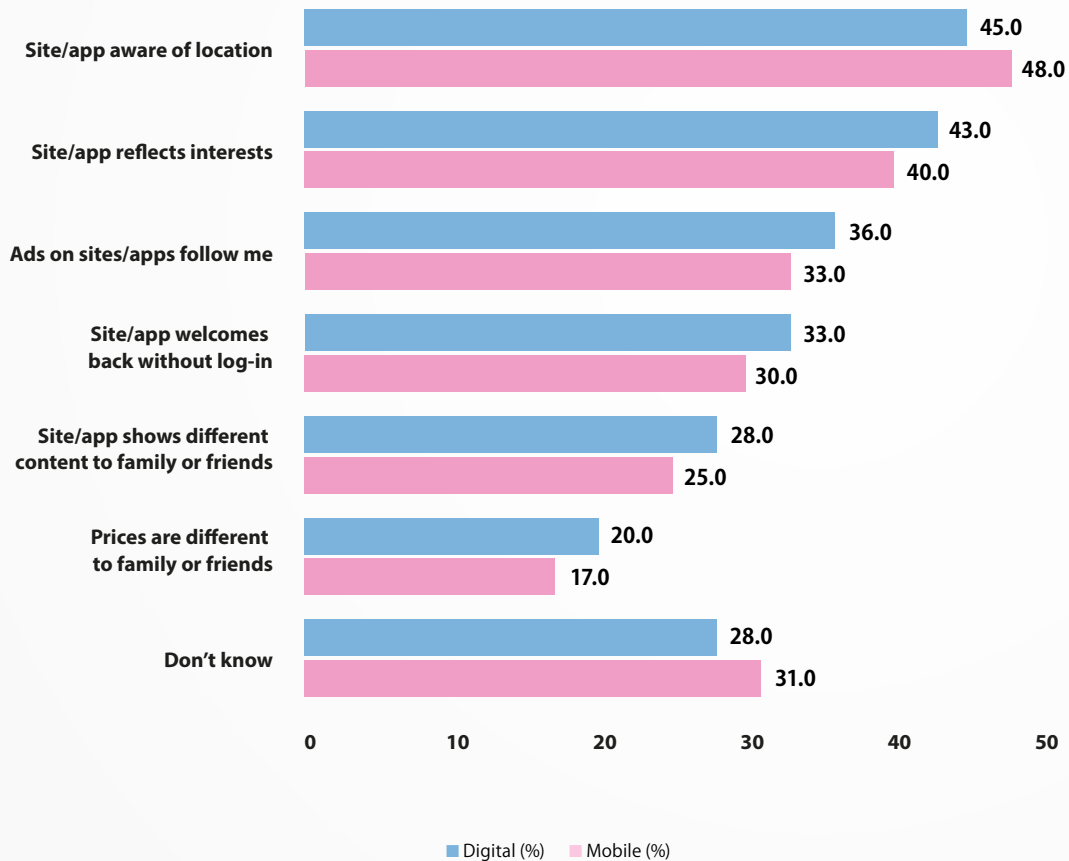
Mobile may be the dominant mode through which consumers engage with brands, but there is only one data-driven experience they notice more in this channel than via their desktop or laptop - location-aware service. While logical, it means that half of consumers have not had a distinctively mobile experience with organisations where their physical position drives the engagement.

Personalisation, where a site or app reflects the individual consumer's interests, is the second-commonest experience - this will be a critical service to reflect personal information in the post-GDPR world and to demonstrate value. By contrast, being followed around the web by ads - which was the trigger for the 2012 amendment to the cookies directive and which also underpins the current review of the ePrivacy Regulation - is noticed by one-third.

However, nearly the same number appear unaware of any way in which their mobile and digital experience is data-driven, suggesting organisations need to make the data-value exchange clearer in order to sustain data flows and permission.

2.3 - Consumer rating of mobile and digital experiences
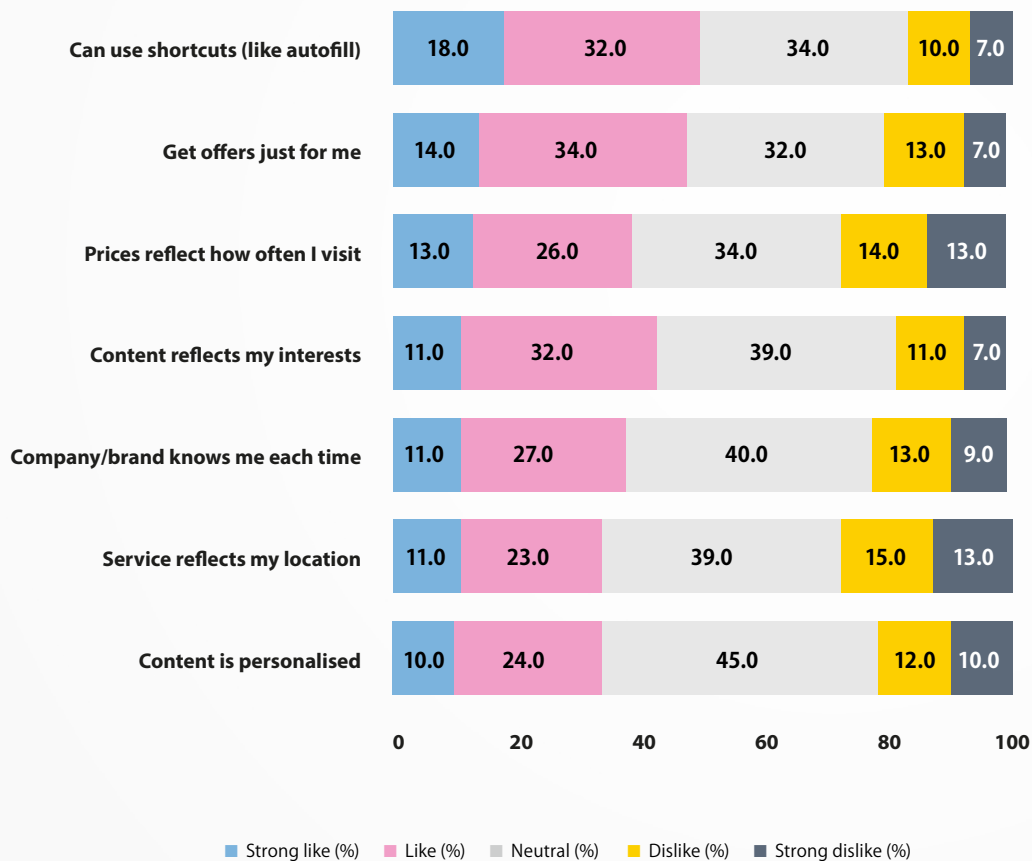
	Strong like (%)	Like (%)	Neutral (%)	Dislike (%)	Strong dislike (%)
Can use shortcuts (like autofill)	18.0	32.0	34.0	10.0	7.0
Get offers just for me	14.0	34.0	32.0	13.0	7.0
Prices reflect how often I visit	13.0	26.0	34.0	14.0	13.0
Content reflects my interests	11.0	32.0	39.0	11.0	7.0
Company/brand knows me each time	11.0	27.0	40.0	13.0	9.0
Service reflects my location	11.0	23.0	39.0	15.0	13.0
Content is personalised	10.0	24.0	45.0	12.0	10.0

■ Strong like (%) ■ Like (%) ■ Neutral (%) ■ Dislike (%) ■ Strong dislike (%)

Overall, consumers have a positive view of their mobile and digital experiences with the highest level of likes being scored by convenience (like autofill), interest-based content and offers or loyalty-based pricing. Shortcuts get a net positive score of 33, while offers score 28, interest-based content 25 and being recognised by the brand 16.

There are reasonably positive scores for loyalty-based pricing and personalised content, which both score plus 12. However, location-aware services only score a net positive of 6, even though these are the most-commonly experienced. Between three and four out of ten consumers are also neutral towards their mobile and digital experiences, suggesting they feel little engagement when presented with data-driven services.

2.4 - Consumer attitudes towards personalisation in mobile and digital

OK as long as I have a choice
Digital: 33.0
Mobile: 31.0

Worries me, but not much I can do about it
Digital: 17.0
Mobile: 14.0

Enjoy experience when it feels beneficial
Digital: 16.0
Mobile: 10.0

Dislike it and try to avoid providing information
Digital: 12.0
Mobile: 16.0

Feels creepy if they take it too far
Digital: 11.0
Mobile: 14.0

Don't know
Digital: 11.0
Mobile: 16.0

■ Digital (%)   ■ Mobile (%)
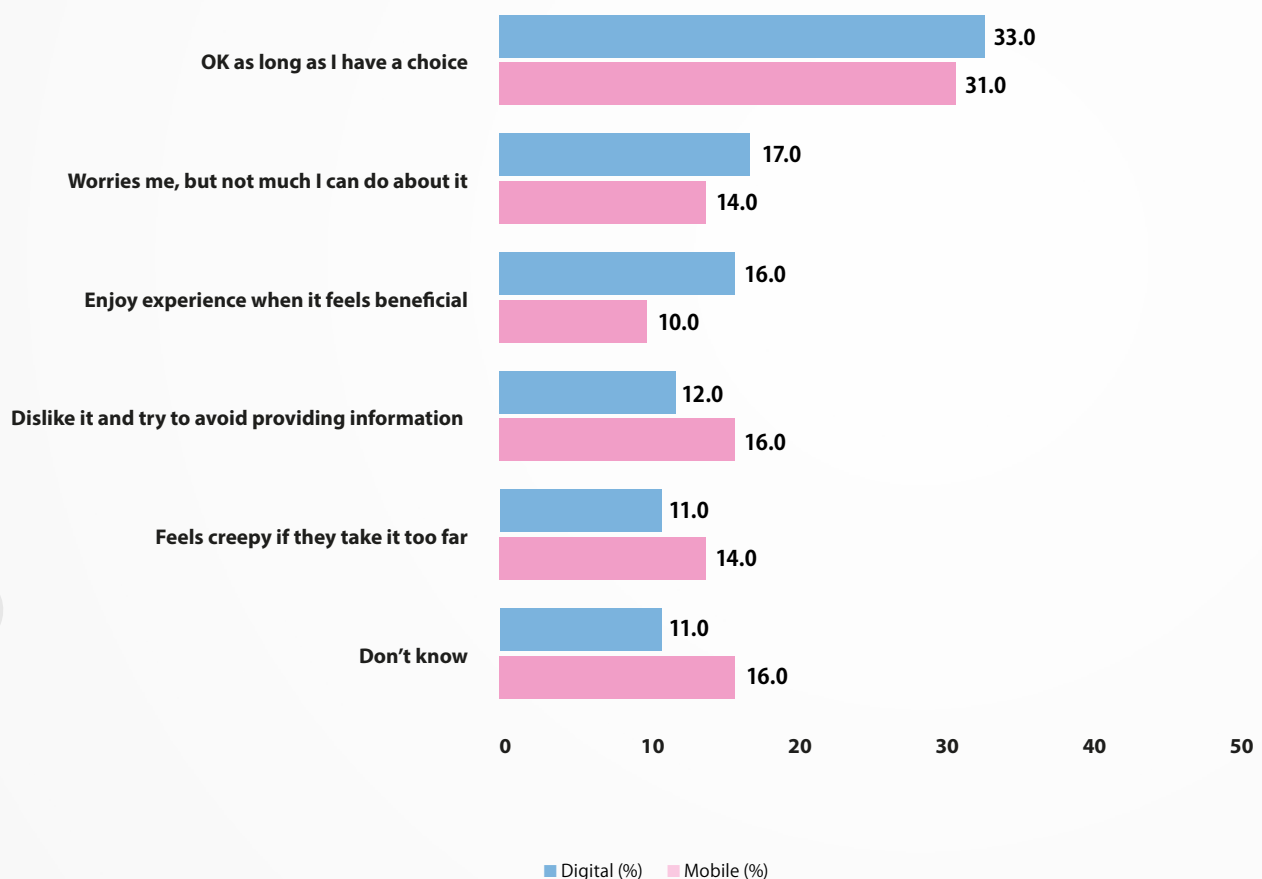
If data should only be collected for specific purposes under GDPR, then personalisation is where that purpose gets reflected back to the consumer. One third of individuals are already showing an attitude that is in line with what the Regulation demands by saying choice is critical. When combined with those who say they enjoy beneficial experiences in digital channels, this means half of all consumers welcome data-driven personalisation, with four in ten holding the same view towards mobile channels.

On the downside, three in ten consumers have negative views towards mobile personalisation, with 16 per cent disliking it and trying to avoid data sharing, while 14 per cent say it can feel creepy. Digital channels have lower scores for this (12 and 11 per cent respectively), suggesting that the close connection which many consumers have with their mobile phone also mean they are more sensitive about how brands engage with them through this device.

2.5 - Consumer expectations of cross-device tracking

	Expect it to be different depending on device	Expect companies to use it across all devices	Would prefer them not to use it	Only use one device so should be the same	Don't really notice	Don't know
All (%)	25.0	21.0	21.0	19.0	8.0	6.0
Trusting (%)	30.9	30.9	7.0	20.3	5.6	5.3
Rational (%)	28.2	20.6	18.7	21.1	7.4	4.0
Cautious (%)	15.4	13.5	36.5	15.1	11.3	8.2

■ Expect it to be different depending on device
■ Expect companies to use it across all devices
■ Would prefer them not to use it
■ Only use one device so should be the same
■ Don't really notice
■ Don't know

Following the customer journey across the multiple devices they use to engage with a brand has become a core marketing objective and is also a powerful reason for collecting data in mobile and digital channels. Yet more consumers expect their experience to be different on each device than expect their personal information to be used across all of their devices. Among those with a Trusting attitude, this view is even higher (although exactly matched by the number who are in favour of cross-device tracking).

It may be that consumers are simply reflecting back the experience they already have, since many organisations struggle with cross-device tracking. But it may also be the case that brands should consider how to make their mobile and digital customer experiences more distinctive from each other and foreground what is device-specific in each.

Section 3 - Business and GDPR

3.1 - Awareness and preparedness for the General Data Protection Regulation (GDPR)

	Very	Somewhat	Neutral	Not very	Not at all
Aware 2018 (%)	84.3	12.4	1.8	1.3	
Aware 2017 (%)	50.0	36.3	9.0	3.8	0.9
Aware 2016 (%)	46.0	33.0	10.0	7.0	4.0
Prepared 2018 (%)	25.4	61.0	5.6	6.8	1.1
Prepared 2017 (%)	14.6	53.3	15.1	15.1	1.9
Prepared 2016 (%)	7.0	48.0	20.0	17.0	8.0

Legend: ■ Very ■ Somewhat ■ Neutral ■ Not very ■ Not at all
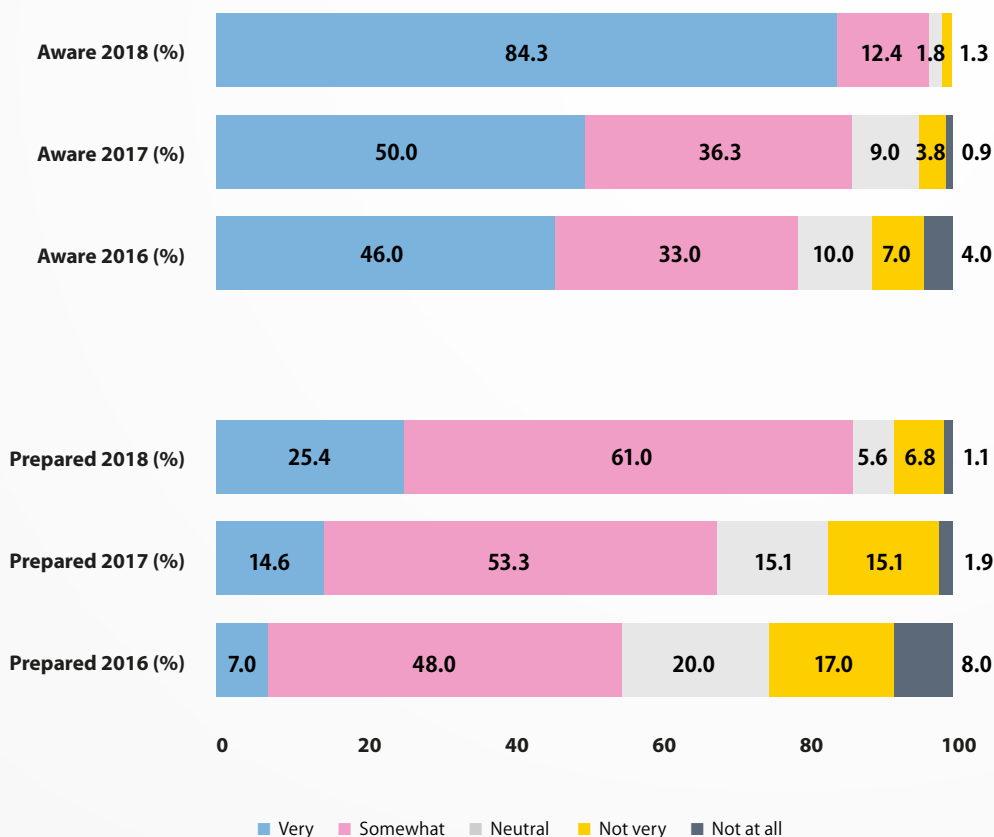
With the exception of a tiny minority, virtually all organisations are now aware that the legal framework relating to data protection is about to undergo a once-in-a-lifetime change. This is positive - but it is also clear that the impending deadline for enforcement has played a major role in driving up this awareness. Many commentators have objected to the fear factor that has been present in discussions about GDPR, but the evidence is that it has had a positive impact.

Converting knowledge that there is a new law into real-world plans is harder, but the number of organisations who are very prepared has more than tripled between 2016 and 2018. Taken with those who describe themselves as somewhat ready, nearly nine in ten organisations are in a good place for the new regime. Meanwhile, the reverse has happened among those not very or not at all prepared, with their number falling fourfold over the same period.

3.2 - Maturity of data and analytics adoption 2016 - 2018

	Aware	Repeatable	Defined	Managed	Optimised
2018 (%)	7.9	10.7	18.6	41.8	20.9
2017 (%)	3.8	14.1	41.0	24.5	16.5
2016 (%)	2.0	13.0	46.0	27.0	12.0
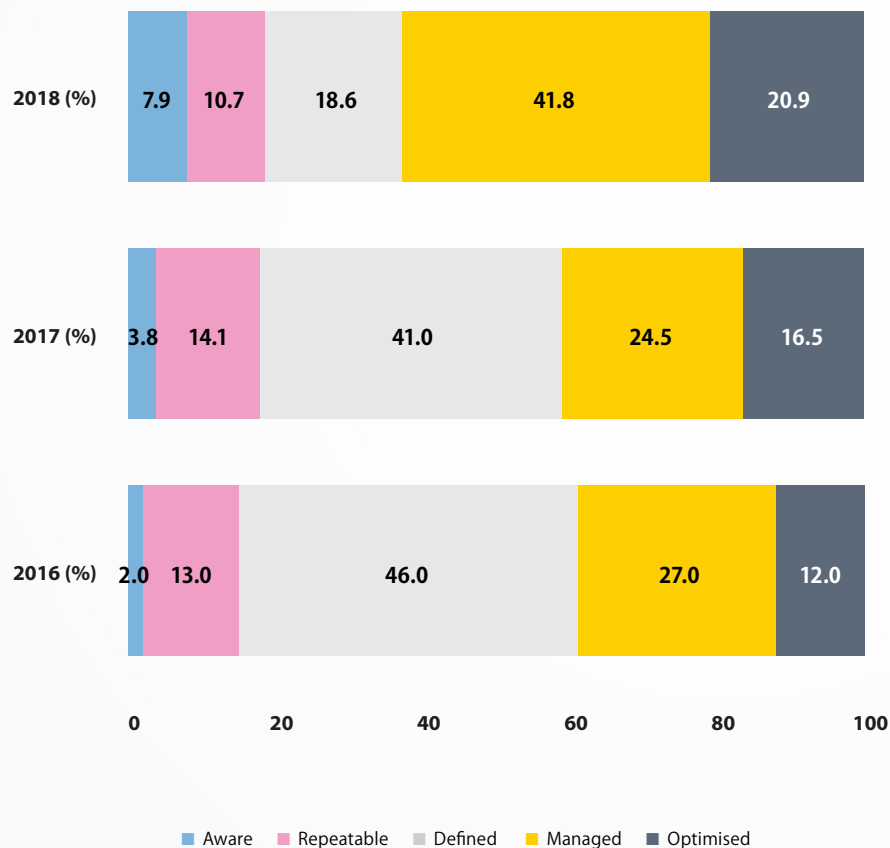
There has been a significant maturing in the level of data and analytics adoption over the past year, with six out of ten organisations now identifying themselves in the top two quintiles, Managed and Optimised. Both of these groups have nearly doubled in size since 2016, although it is notable that the least mature group, Aware, has grown nearly fourfold in the same period.

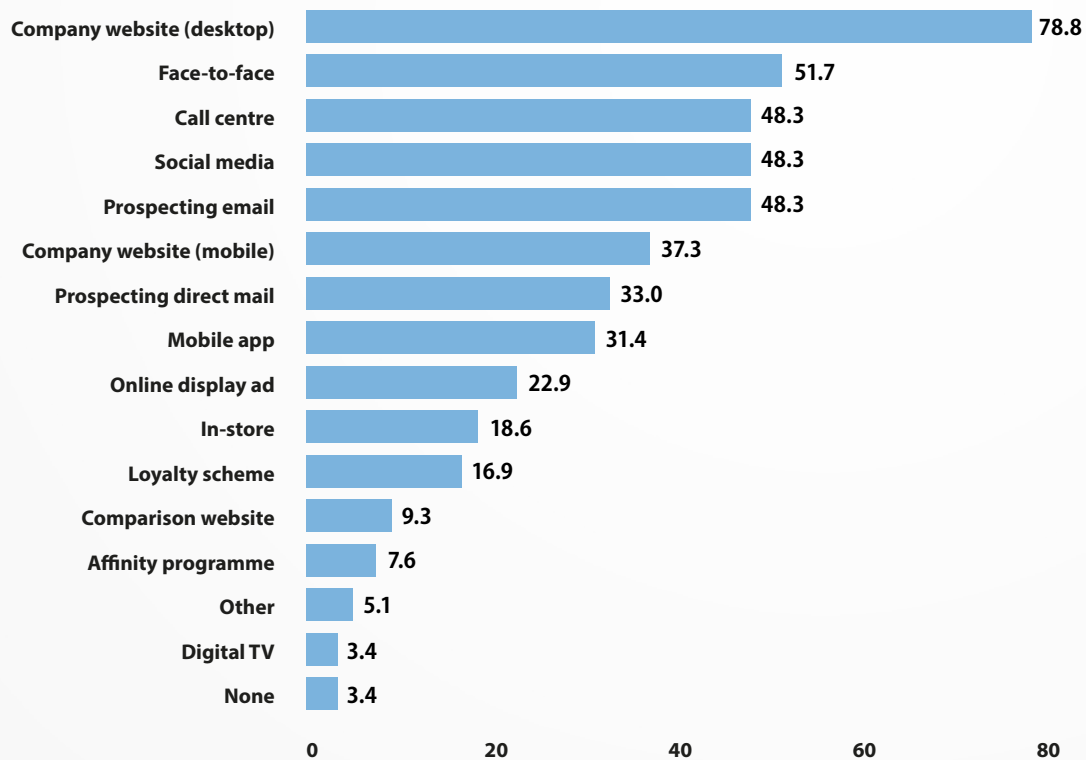The most compelling explanation for this shift is the efforts being made by companies to understand and improve their data and analytics functions as part of GDPR programmes, or perhaps for some to realise that they are in a worse place than had been recognised. But for UK plc as a whole, there is a degree of reassurance that the level of exposure to data protection risk has reversed since last year, when nearly six out of ten put themselves in the middle or lowest quintiles.

Section 4 –
Business and mobile and digital data collection

4.1 - Touchpoints used to collect personal information and permissions

Touchpoint	Value
Company website (desktop)	78.8
Face-to-face	51.7
Call centre	48.3
Social media	48.3
Prospecting email	48.3
Company website (mobile)	37.3
Prospecting direct mail	33.0
Mobile app	31.4
Online display ad	22.9
In-store	18.6
Loyalty scheme	16.9
Comparison website	9.3
Affinity programme	7.6
Other	5.1
Digital TV	3.4
None	3.4

The engagement surface between brands and consumers is wide and diverse, presenting multiple opportunities to capture personal information and the appropriate permission to process it. Even so, conventional channels continue to dominate with eight out of ten organisations feeding their data needs via a desktop website - half this number have optimised for mobile, despite the primacy of that access channel among consumers. Similarly, use of mobile apps lags with six in ten companies not deploying this touchpoint. It also appears that loyalty schemes - once at the heart of the data-value exchange - have fallen from favour and are now only seen as relevant by one in six firms.

Companies that are very or somewhat prepared for GDPR are also more likely to use the full spectrum of touchpoints than those who are not very or not at all prepared, where the number of channels in use is significantly lower. Given the demand in the Regulation for granular consent, this spread of data collection opportunities appears like to be both more compliant and also better able to sustain data flows.

4.2 - Types of data trackers used x preparedness for GDPR

	All	Very prepared	Somewhat prepared	Neutral	Not very prepared	Not at all prepared
First-party cookies (digital)	80.3	56.2	56.1	50.0	75.0	
First-party cookies (mobile)	60.7	43.7	43.9	50.0	25.0	
Third-party analytics trackers (digital)	71.4	58.3	63.0	50.0	50.0	100.0
Third-party analytics trackers (mobile)	44.6	41.7	37.0	50.0	50.0	
Social sharing buttons (digital)	57.1	66.7	57.9	50.0	66.7	50.0
Social sharing buttons (mobile)	39.3	33.3	42.1	50.0	33.3	50.0
First-party analytics trackers (digital)	54.4	64.3	61.3	50.0	66.7	
First-party analytics trackers (mobile)	35.7	35.7	38.7	50.0	33.3	
Ad network cookies (digital)	46.4	60.0	64.0	50.0	60.0	
Ad network cookies (mobile)	28.6	40.0	36.0	50.0	40.0	
First-party content tags (digital)	46.4	62.5	58.1	50.0	50.0	
First-party content tags (mobile)	33.9	37.5	41.9	50.0	50.0	
Third-party content tags (digital)	30.4	66.7	62.5	50.0	66.7	
Third-party content tags (mobile)	17.9	33.3	37.5	50.0	33.3	
Social log-in (digital)	28.6	75.0	65.0			
Social log-in (mobile)	14.3	25.0	35.0			

■ All ■ Very prepared ■ Somewhat prepared ■ Neutral ■ Not very prepared ■ Not at all prepared

Trackers are an important way for organisations to follow the consumer's journey from suspect to prospect to customer. If there is a maturity in their use, then it follows a path towards managed and controlled first-party tagging and away from free analytics and third-party cookies or pixels. This happens as firms recognise the need to bring these data streams under their direct control and governance.

It is clear that the more ready a brand is for the arrival of GDPR enforcement, the more likely it is to adopt direct tag management. By contrast, those who are less prepared are more likely to rely on tools given away by search engines (eg, Google Analytics) or which deliver data back to a social network (social sharing buttons).

It is also worth noting that organisations do not have a great deal of visibility into these trackers - only 31.1 per cent of respondents could answer this question. As a potentially high-risk area for compliance, this should be a cause for concern to the other 68.9 per cent.

4.3 - Integrating personal and digital data x GDPR preparation

Category	Using a common identifier to integrate along the customer journey	Have separate CDP, DMP and CRM	Customer data held in-house, digital data held by third-party	Not currently using digital data	Don't know
All	26.3	38.1	16.9	12.7	5.9
Very prepared	31.0	44.8	24.1		
Somewhat prepared	29.7	37.8	12.2	14.9	5.4
Neutral		33.3	16.7	33.3	16.7
Not very prepared		28.7	42.9		28.6
Not all all prepared				100.0	

Legend:
- ■ Using a common identifier to integrate along the customer journey
- ■ Have separate CDP, DMP and CRM
- ■ Customer data held in-house, digital data held by third-party
- ■ Not currently using digital data
- ■ Don't know

Integrating all sources of customer data - digital, transactional, social, mobile - delivers real business and customer benefit through an improved experience and more personalised service. It also delivers against a number of key requirements of GDPR, such as access, correction and portability. Organisations who are not able to find every customer data point are likely to struggle to comply.

Three in ten companies that are very or somewhat prepared for GDPR already have a common identifier in place which enables this integration. By contrast, companies at all other levels of preparation are notable for not having a common identifier. The customer experience at the unprepared is also not likely to be very satisfying given these firms are not making any use of digital data.
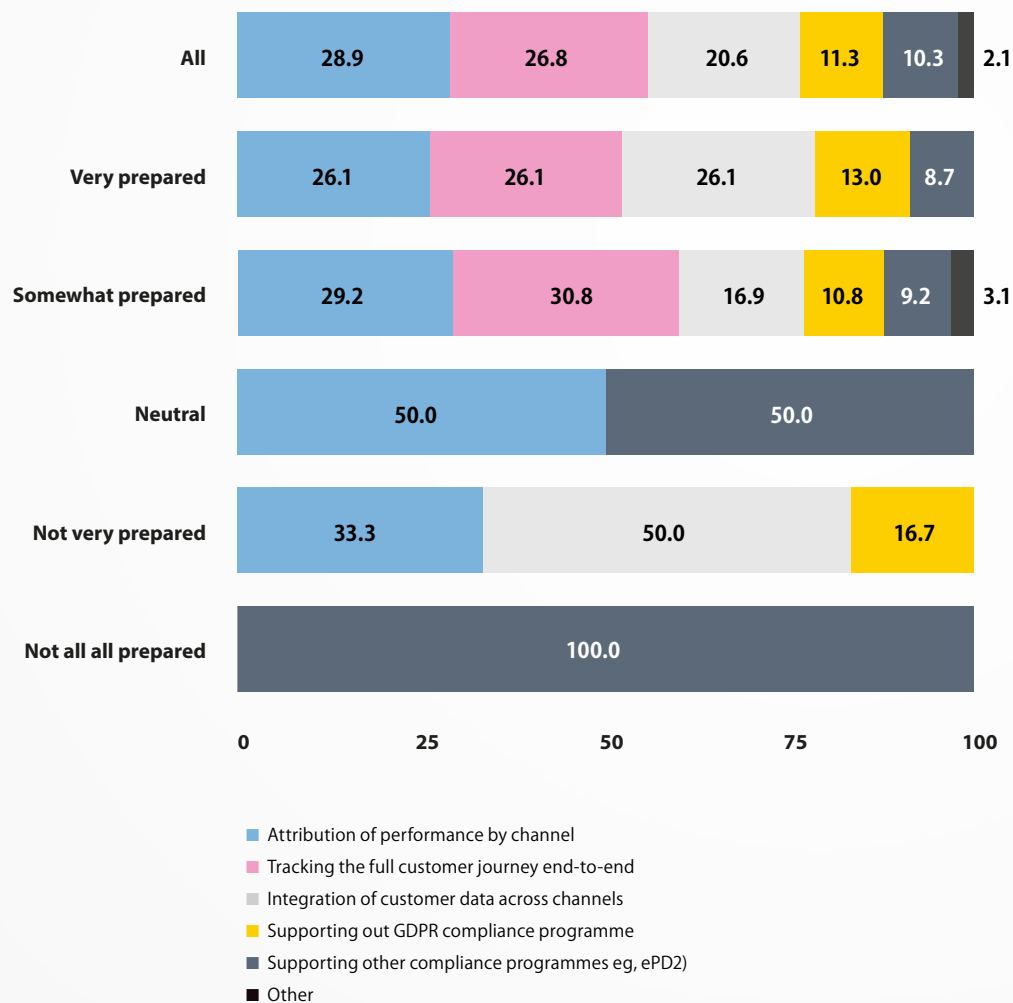
Sewing together all sources of data in this way is not easy, especially given the proliferation of technology platforms in which customer data resides, such as CRM systems, customer data platforms and data management platforms. More challenging is where digital data is in the hands of a third-party which may make integration harder - those who are not very prepared for GDPR are nearly twice as likely to be in this situation as those who are very prepared, although even leaders have a higher-than-average exposure to this situation.

4.4 - Usage of data trackers x preparedness for GDPR

All	28.9	26.8	20.6	11.3	10.3	2.1
Very prepared	26.1	26.1	26.1	13.0	8.7	
Somewhat prepared	29.2	30.8	16.9	10.8	9.2	3.1
Neutral	50.0				50.0	
Not very prepared	33.3		50.0	16.7		
Not all all prepared					100.0	

0   25   50   75   100

- ■ Attribution of performance by channel
- ■ Tracking the full customer journey end-to-end
- ■ Integration of customer data across channels
- ■ Supporting out GDPR compliance programme
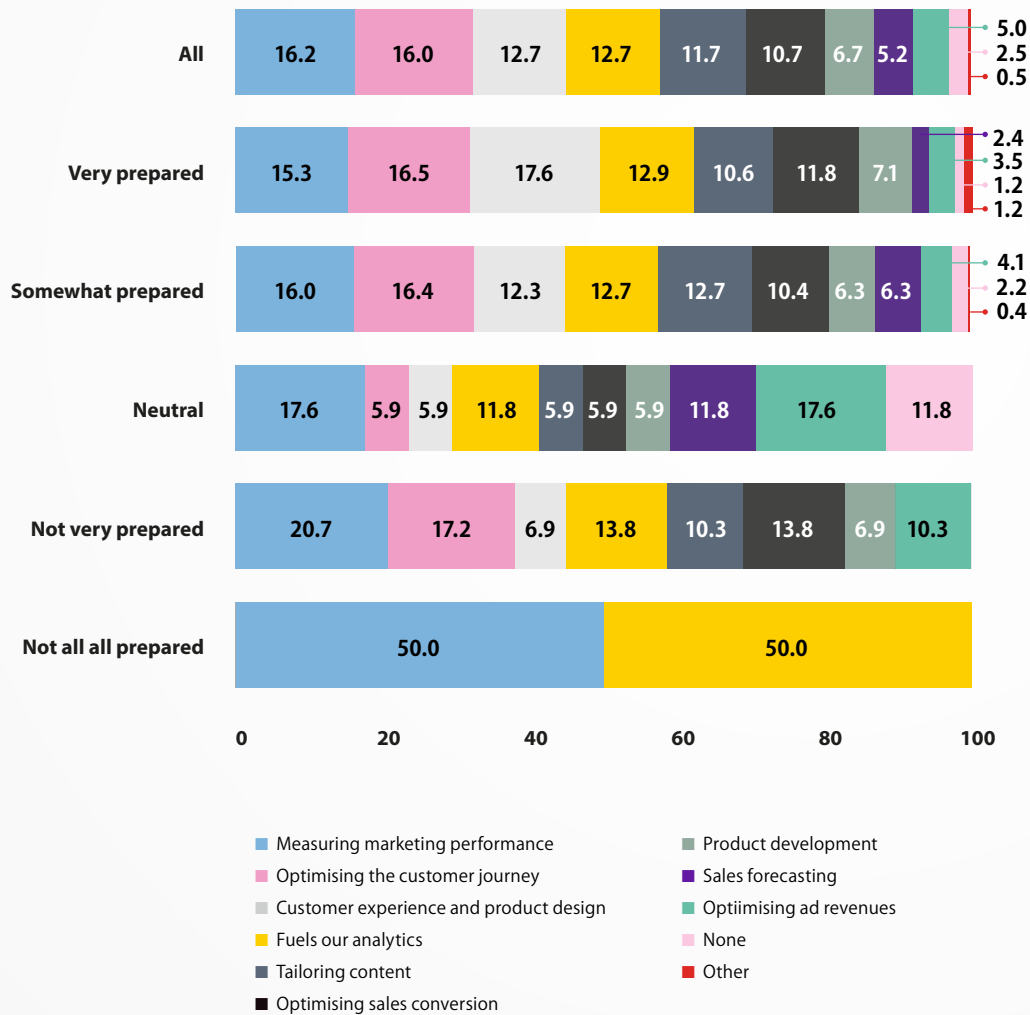- ■ Supporting other compliance programmes eg, ePD2)
- ■ Other

As GDPR makes clear, data should only be collected if there is a clear purpose for its use. That means organisations need to map their data needs and conduct data protection impact assessments on data-driven processes. One outcome of this can be to show where data is not being appropriately deployed - which is a compliance risk - or that desired processes lack the necessary data.

It is clear that deploying tracking data into key processes is closely correlated with being ready for GDPR, whereas those organisations who are less or not at all prepared have limited use cases. Well governed and managed tracker data not only supports the customer journey and customer data integration, it also has value for compliance purposes. Using trackers to attribute marketing performance by channel looks to be the one constant for every firm that collects this data and is also a strong business case for adopting this technique.

4.5 - Benefits of data trackers x preparedness for GDPR

	Measuring marketing performance		Product development
	Optimising the customer journey		Sales forecasting
	Customer experience and product design		Optiimising ad revenues
	Fuels our analytics		None
	Tailoring content		Other
	Optimising sales conversion		

Given the entry-level use of data trackers to attribute marketing performance by channel, it is to be expected that measuring marketing performance is the most common benefit seen from this data across all organisations. But given the costs associated with building an integrated customer and digital data infrastructure, it makes sense to leverage the data derived as widely as possible. This diversity of benefit is most visible among those organisations who are best prepared for GDPR and least among those who are not
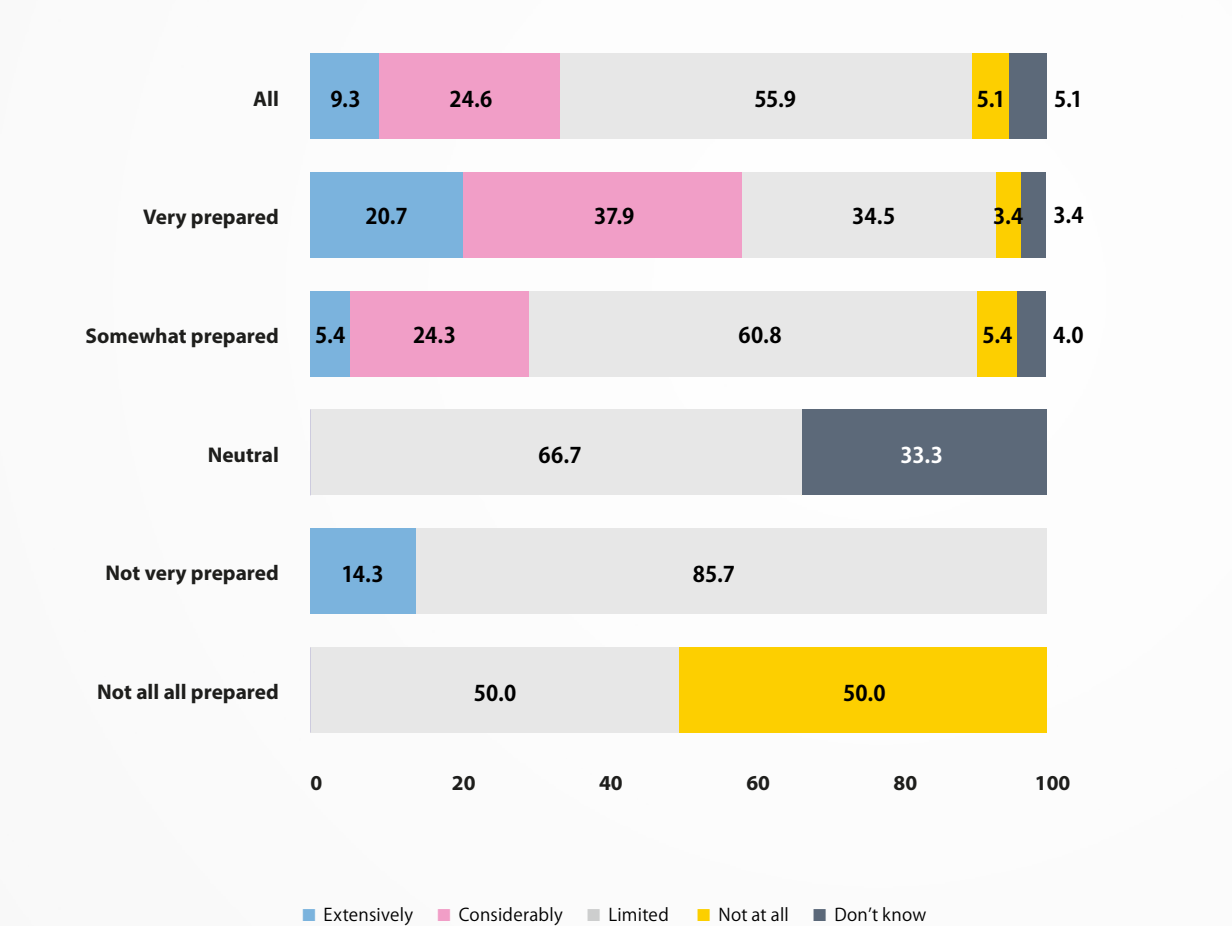
- this underlines the correlation between preparing for the new Regulation and the maturity of data practice.

What stands out is that those firms who are very prepared make more use of data trackers for customer experience and product design than anything else - this is an advanced analytical approach that can yield substantial commercial gain. At the other end of the scale, use of data trackers by those who have not prepared for GDPR is binary - either for measuring marketing performance or not used at all.

4.6 - Extent of data tracker usage x preparedness for GDPR

	Extensively	Considerably	Limited	Not at all	Don't know
All	9.3	24.6	55.9	5.1	5.1
Very prepared	20.7	37.9	34.5	3.4	3.4
Somewhat prepared	5.4	24.3	60.8	5.4	4.0
Neutral			66.7		33.3
Not very prepared	14.3		85.7		
Not all all prepared			50.0	50.0	

■ Extensively　■ Considerably　■ Limited　■ Not at all　■ Don't know

Data from trackers is used most extensively at organisations that are very prepared for GDPR (although there is an outlier group among the not very prepared). These firms either could not operate without it or have adopted it across most functions, with only a few gaps. This gives them a considerable competitive advantage compared to the overall market, especially those organisations who are using this data extensively at twice the average level.

Even so, there is still an adoption gap - the majority of firms who have data from trackers are either only making limited use of it or none at all. With trackers likely to require consent and the purpose for which they are being collected needing to be explained under GDPR, companies will either need to make use of this data or stop collecting it.

4.7 - Capability around mobile data tracker usage v preparedness for GDPR

	Fully-developed, enterprise-wide mobile tracking capability	Mobile tracking used in most areas, but not all	Only just started to make use of mobile trackers	Not using any mobile trackers	Don't know
All	5.4	25.0	32.1	21.4	16.1
Very prepared	18.2	27.3	18.2	27.3	9.1
Somewhat prepared	2.6	26.3	36.8	15.8	18.4
Neutral			100		
Not very prepared		25.0	25.0	50.0	
Not all all prepared				50.0	50.0

- Fully-developed, enterprise-wide mobile tracking capability
- Mobile tracking used in most areas, but not all
- Only just started to make use of mobile trackers
- Not using any mobile trackers
- Don't know

Use of mobile data trackers to any extent is still relatively limited, with only 19.4 per cent of organisations reporting any level of capability. Among this group, just one in 20 have fully-developed, end-to-end mobile tracking, with those who are very prepared for GDPR nearly four tmes more likely to be in this position (18.2 per cent v 5.4 per overall). Some level of adoption is evident among a quarter of those companies who have been preparing for the Regulation.

But preparedness for the new law is no guarantee of maturity in mobile data tracker capability. It is more likely that specific requirements of the business will have driven their introduction, but that developing a fully mature function around this data is more challenging.

01

Methodology

Research for this series of whitepapers was carried out in two parts.

Consumer research was commissioned by DataIQ from Research Now in 2016, 2017 and 2018 among an online panel representative of the UK population. All respondents were aged over 18, UK residents and were served a self-completion questionnaire. A total of 1,000 surveys was completed in 2016, 1,001 in 2017 and 1,005 in 2018.

Business research was conducted via a self-completion questionnaire served online to members of the DataIQ community. In 2018, this generated 180 responses, while the same survey in 2017 generated 212 responses and in 2016 187 responses.

About Tealium

Tealium revolutionises today's digital businesses with a universal approach to managing the ever-increasing flows of customer data - spanning web, mobile, offline and Internet of Things devices. With the power to unify customer data into a single source of truth, combined with a turnkey integration eco-system supporting more than 1,000 vendors and technologies, Tealium's Universal Data Hub enables organisations to leverage real-time data to create richer, more personalised digital experiences across every channel.

Founded in 2008, Tealium was recently named to the Inc. 500, which recognises the fastest-growing private companies in America. The company's award-winning solutions are used by hundreds of global enterprises, including Orange, TUI, Vodafone, Cathay Pacific Airways, Domino's Pizza & Kimberly-Clark Corp.

Email: emeamarketing@tealium.com
Phone: +44 (0)20 7084 6268
Web: http://tealium.com
Twitter: @tealium
LinkedIn: Tealium [https://www.linkedin.com/company/tealium]

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