

# Securys<sup>®</sup>

Global Data Privacy Experts

Privacy Made Positive<sup>®</sup>  
Europe

Data privacy and consumer  
choice and behaviours  
across Europe.

Privacy Made Positive<sup>®</sup>

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# Insights

Over time, societies came to expect companies to produce safe products. Both legal and market pressures came to bear.

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*“Privacy will be to the Information Age as product safety was to the Industrial Age.”*

(Observations and quote from an unknown prognosticator at Bell Labs, many years ago)<sup>1</sup>



## Disclaimer

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# Company profiles

## Securys

Securys is a specialist data privacy consultancy with a difference. We're not a law firm, but we employ lawyers. We're not a cybersecurity business, but we've got CISSPs and CISAs on the staff. We're not selling a one-size-fits-all tech product, but we've built proprietary tools and techniques that work with the class-leading GRC products to simplify and streamline the hardest tasks in assuring privacy. We're corporate members of the IAPP, and all our staff are required to obtain one or more IAPP certifications. We're ISO27001:2013 and ISO27701:2019 certified for information security and data privacy. We have a comprehensive set of policies and frameworks to help our clients achieve and maintain certification. Above all, our relentless focus is on practical operational delivery of effective data privacy for all your stakeholders.

Our long and varied collective experience means we go wider and deeper than most. We understand that all businesses – but particularly the financial, healthcare and resource extraction sectors – exist in a multi-dimensional regulatory environment. Each regulator has different priorities; sometimes these bring about real tensions between compliance workstreams. Our job is to understand the regulatory continuum and help our clients meet all of their compliance requirements efficiently and affordably. Practically, we'd say.

→ Find out more at [www.securys.co.uk](http://www.securys.co.uk).



Didomi builds technology that allows organizations to place customer consent at the core of their strategy. By making consent and preferences easily accessible, companies benefit from compliant customer data while seeing higher engagement and increased user trust. Consumers, on their side, are free to choose what data to share and how to stay connected to their favorite brands across touchpoints. Our products include a globally adopted Consent Management Platform (CMP), which collects billions of consents every month, a highly popular Preference Center (PC), and a powerful suite of bespoke solutions to build better consent and preference management.

→ Find out more at [www.didomi.io](http://www.didomi.io).



Llewellyn Consulting is an independent macro advisory firm, providing strategic research and analysis, thought leadership, and advice. We use our depth of experience, breadth of expertise, and wide network of associates, recognised experts, and business partners to provide early insight into key developments, turning points, risk, and implications for companies and markets. With economics firmly at the core, our expertise and focus is on the main drivers of economies and markets, ranging from technology, climate change, and energy; through to ESG, policy, and political issues.

→ For further information, please see [www.llewellyn-consulting.com](http://www.llewellyn-consulting.com).

# About the authors



**Ben Rapp**

Founder & Principal  
SECURYS

Ben is a Certified Information Systems Security Professional with the Information Systems Security Management concentration, a Certified Information Privacy Professional/Europe, a Certified Information Privacy Manager and an IAPP Fellow of Information Privacy; he's also a Chartered Information Technology Professional and a Fellow of the British Computer Society. He previously founded and ran Managed Networks, the leading provider of IT services to the entertainment industry.



**Preston Llewellyn**

Managing Partner  
LLEWELLYN CONSULTING

Preston holds a BA and an MSc in Economics with French; and an MBA from Imperial College, London. Preston co-founded Llewellyn Consulting in 2009 where he oversees all aspects of the business, works substantively on all major projects, and writes extensively on a range of subjects. He previously spent over ten years in industry, where he was responsible variously for corporate strategy, business development, communications, and marketing. Preston is also experienced in managing business contracts and partnerships spanning both the private and public sector, and in project management.



**John Llewellyn**

Partner  
LLEWELLYN CONSULTING

Before co-founding Llewellyn Consulting, John was Global Chief Economist and then Senior Economic Policy Advisor at Lehman Brothers. This followed almost twenty years at the Organisation for Economic Cooperation and Development (OECD) in Paris, where variously he was Head of International Forecasting and Policy Analysis, Editor of the OECD Economic Outlook, Deputy Director for Social Affairs, Manpower and Education, and finally Chef de Cabinet to the Secretary-General. Prior to that he spent nearly ten years at the Faculty of Economics of the University of Cambridge, and he was also a Fellow of St. John's College.

John earned his undergraduate degree at the Victoria University of Wellington, New Zealand, and his doctorate at the University of Oxford. He has published widely.

# Privacy Made Positive™

[Securys](#) has an agenda. We're a consulting business, but we didn't get into privacy just to make money. We did it because we believe in privacy. We believe that everything depends on trust: society, government, commerce. We believe that privacy is an essential component of trust. Trust involves treating customers fairly, being open about how you conduct business, and making sure your benefit isn't at the cost of someone else's harm.

We also believe that trust brings business. Consumers will be more likely to buy from and recommend a company that they trust. Employees will be more likely to join an enterprise that shows them respect and doesn't exploit the power of the employment relationship. Both consumers and employees will desert organisations that lose that trust.

Too many people see privacy as a compliance issue alone. A box to be ticked; a regulator to be placated. That thinking drives a culture of resentment, with privacy seen as an obstacle. It also means that budgets for privacy are often calculated only in the context of possible fines without considering competitive.

We set out to do comprehensive research to prove that privacy is a positive value. To show that you really can do well by doing good, and that consumers and employees respond to privacy in ways that have a measurable effect on your bottom line.

This is the [Privacy Made Positive™](#) programme. In the [first ebook](#) we and our research partners [Llewellyn Consulting](#) looked at the economic background and the existing research to show how ethical behaviour is reflected in corporate performance. We showed that ethical behaviour consistently delivers better engagement with customers, employees and investors.

In this ebook we've moved on to new research. In partnership with [Didomi](#), we commissioned Kantar to survey more than 4,000 adults across France, Germany, Ireland and Great Britain. We asked the respondents how they felt about privacy and – crucially – what they'd done about it. What we found surprised us.

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Consumers will be more likely to buy from and recommend a company that they trust.

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If you commit to safeguarding data beyond the minimum that's required by law you will find consumers prepared to pay for that extra assurance.

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Not only do 80% of people pay considerable attention to privacy before making a purchasing decision, 60% of them actively select for good privacy over price and more than half have stopped buying a product or service because of poor privacy.

More than 70% are worried about their privacy. Identity theft tops the list of concerns, but seeing their data used in ways they weren't expecting is a close second. More than a third of respondents were prepared to spend more to ensure their privacy is better protected. This means going beyond the legal minimum to make privacy a central part of your offer.

Four-fifths of respondents also believe that privacy is a determinant of whether to trust a brand. Half of consumers routinely refuse marketing emails or cookies – but nearly three-quarters of them will change their minds if offered comprehensive and clear privacy information beforehand.

Our research shows that privacy is front of mind for an overwhelming majority of consumers. Competing on privacy will bring you more customers. If you commit to safeguarding data beyond the minimum that's required by law you will find that consumers place added value on that. On the other hand, if you merely pay lip-service

to data protection you risk losing existing customers as well as missing out on new ones.

Privacy Made Positive™ makes the case for treating privacy as a whole-enterprise activity that's central to your brand. Investing in privacy will deliver a measurable return, not just in reputation protection and avoidance of fines, but in increased sales and profits.

You should embrace privacy because it's a human right – but you can be reassured that it's also a commercial imperative.

# 1. Consumers are aware



Nearly **everyone** today is confident that they know what **'personal data'** means.

- Over 85% of people across all countries say that they understand the meaning of personal data.
  - › Levels of confidence are highest in Germany at 91%, and least high in GB at 85%.
- Confidence is also fairly evenly spread across age groups, gender, occupation, and employment status, as well as countries.
  - › Very few, just 1% to 3% across all countries, are not confident at all; and over one third are very confident.

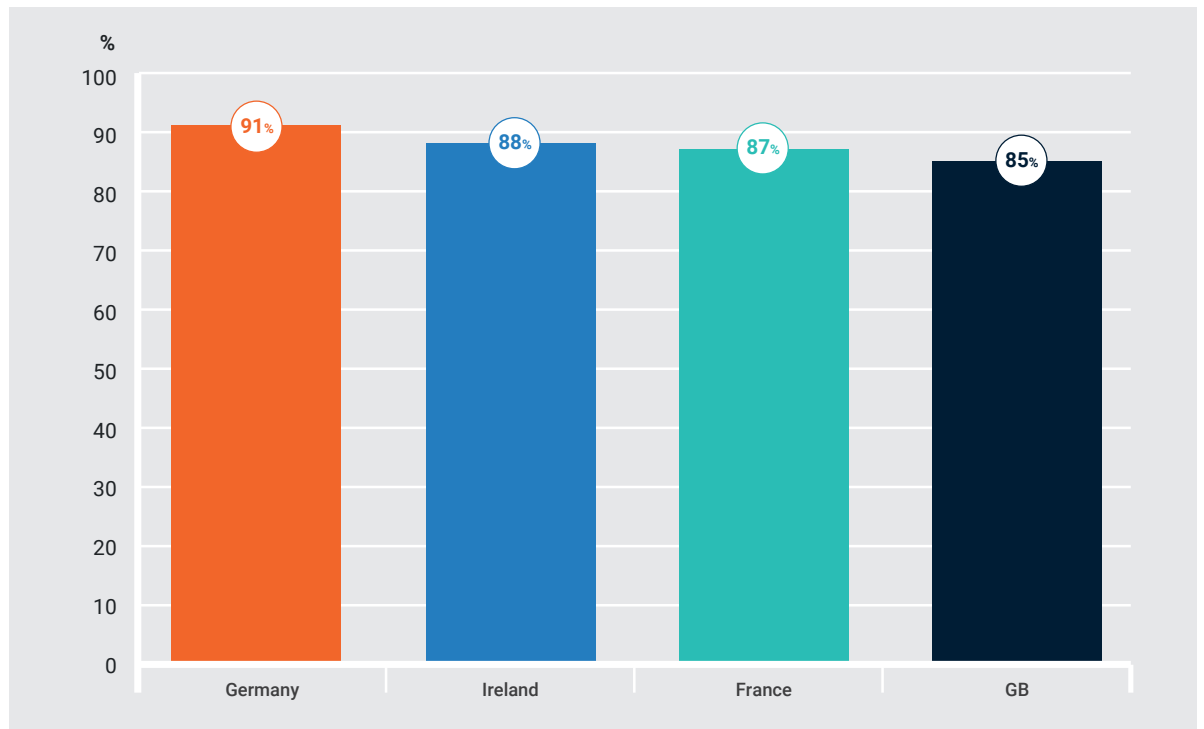


## Interesting fact

In a 2015 IBM study of 24 of the world's major economies, Germany was ranked the most privacy-sensitive nation. At the other end of the spectrum were those in India, who were found to be the most willing to share personal information.<sup>2</sup>

**Figure 1**

I am confident about the definition of personal data





## GDPR Article 4

### Definition

(1) **'personal data'** means any information relating to an identified or identifiable natural person ('data subject'); an identifiable natural person is one who can be identified, directly or indirectly, in particular by reference to an identifier such as a name, an identification number, location data, an online identifier or to one or more factors specific to the physical, physiological, genetic, mental, economic, cultural or social identity of that natural person.

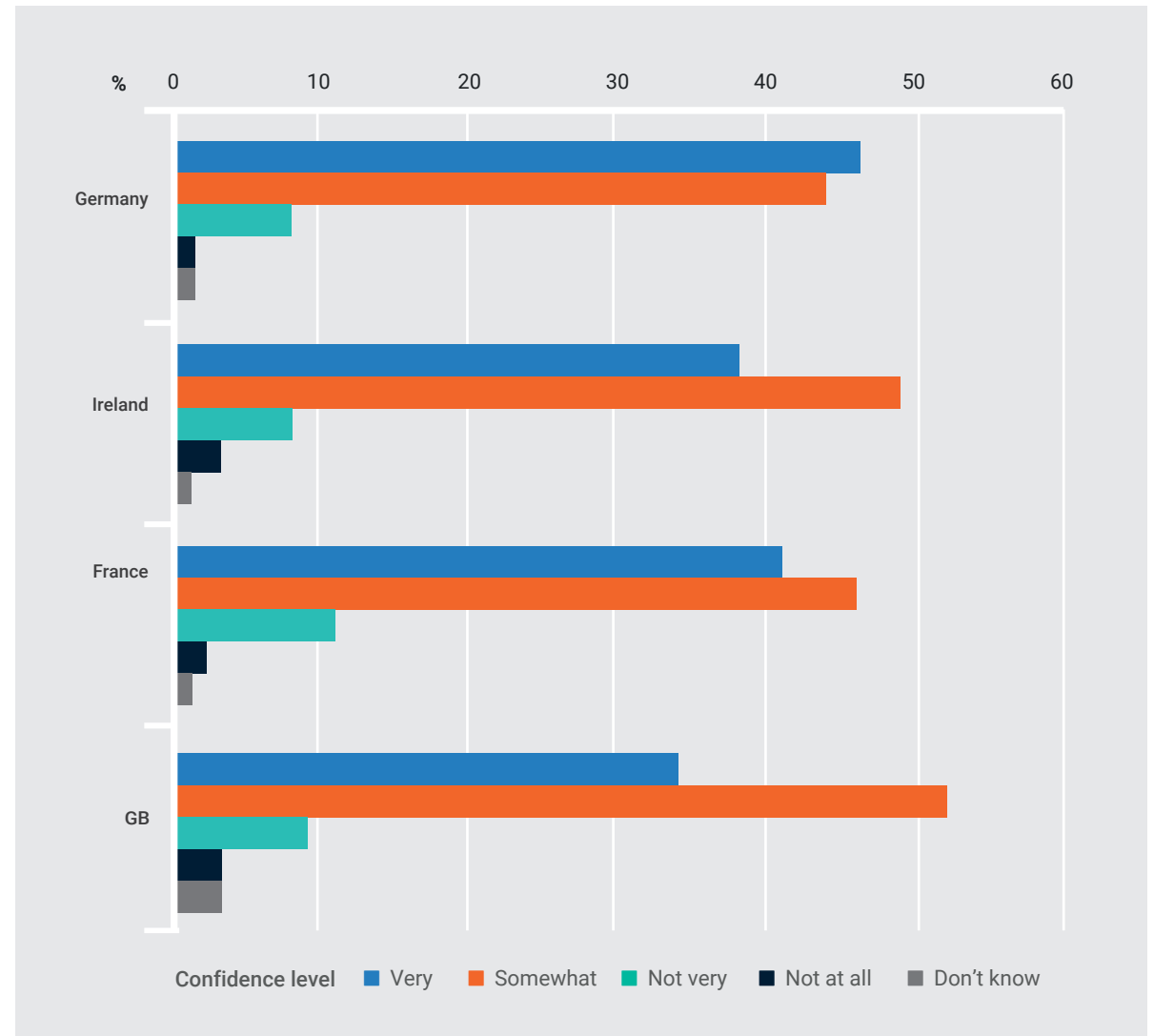


### Question

Six years on from that IBM study, and following the pandemic's onset, have attitudes to privacy shifted more towards those of Germany?

**Figure 2**

Breakdown, by confidence levels, about the definition of personal data



## 2. Consumers are concerned

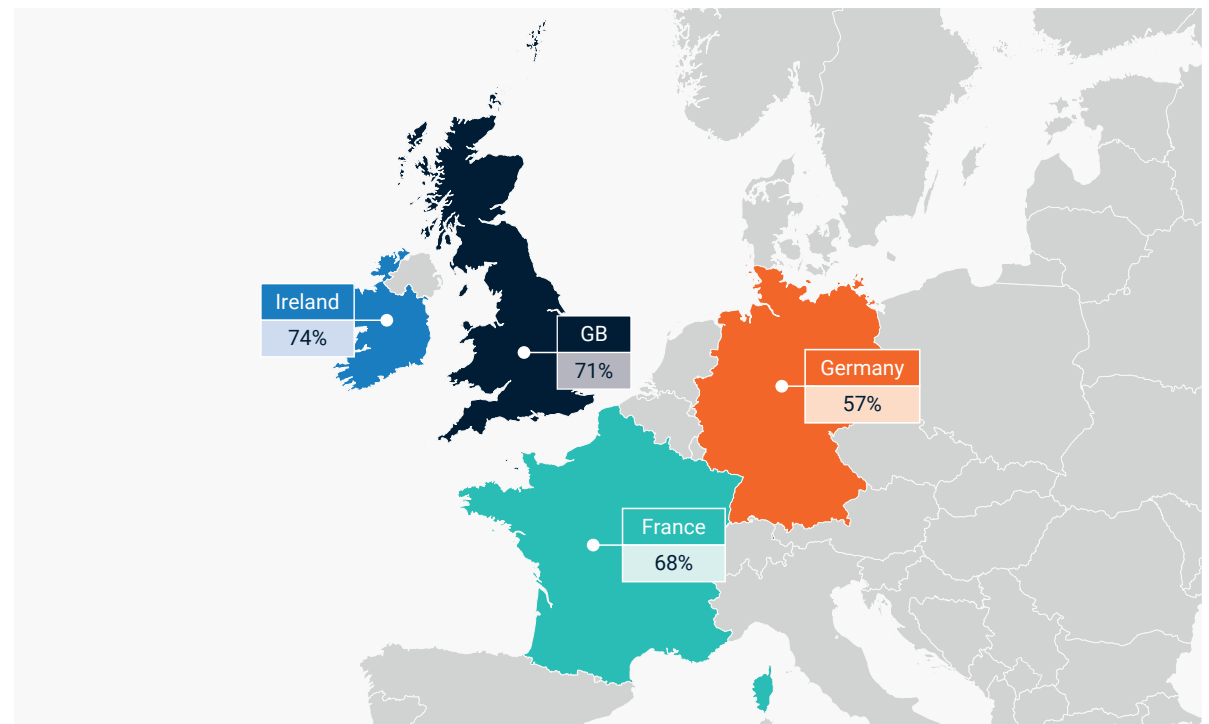


A high proportion of **people are worried** about how their personal data could be misused.

- The concern is quite different by country however:
  - › Those in the Ireland, at nearly 75%, are most concerned, and concern clearly increases with age.
  - › At the other end of the spectrum is Germany, at 57%, and where concern also increases with age.
  - › Great Britain and France, at around 70%, are in between, at similar levels, but concern in both is more evenly distributed across the age range.
- Women are more concerned than men, in all countries, but in Ireland this difference is more pronounced, with women having much greater concern.
- Across all countries, it is those in households where the chief income earner holds a managerial role.

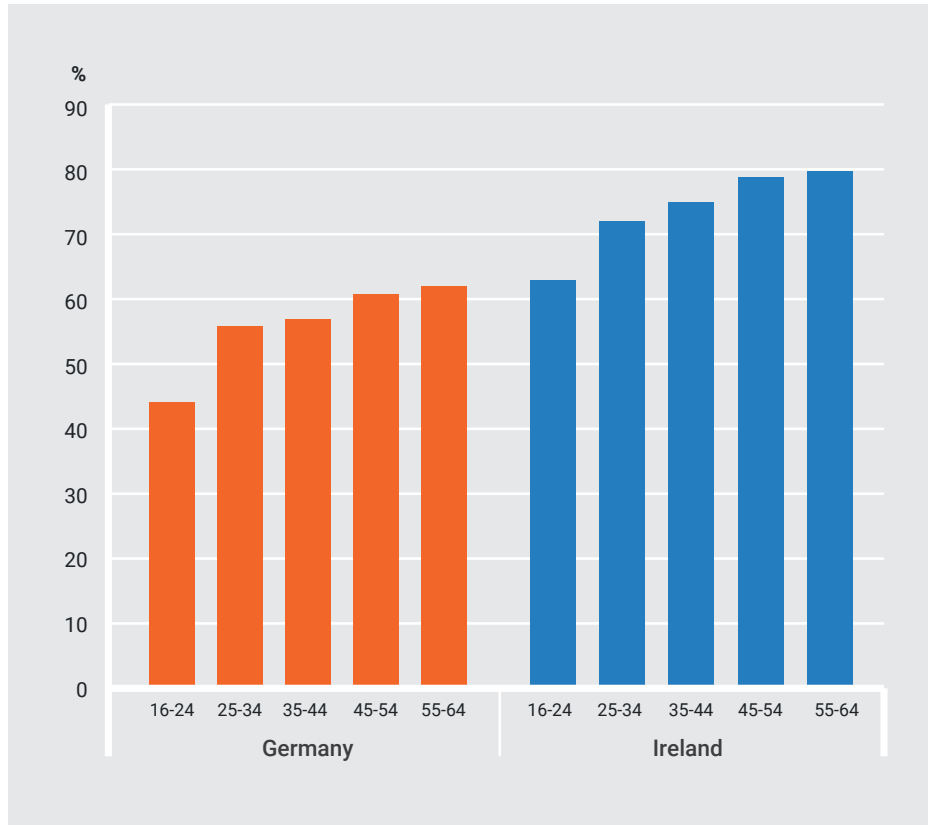
**Figure 3**

Concern about how personal data may be used



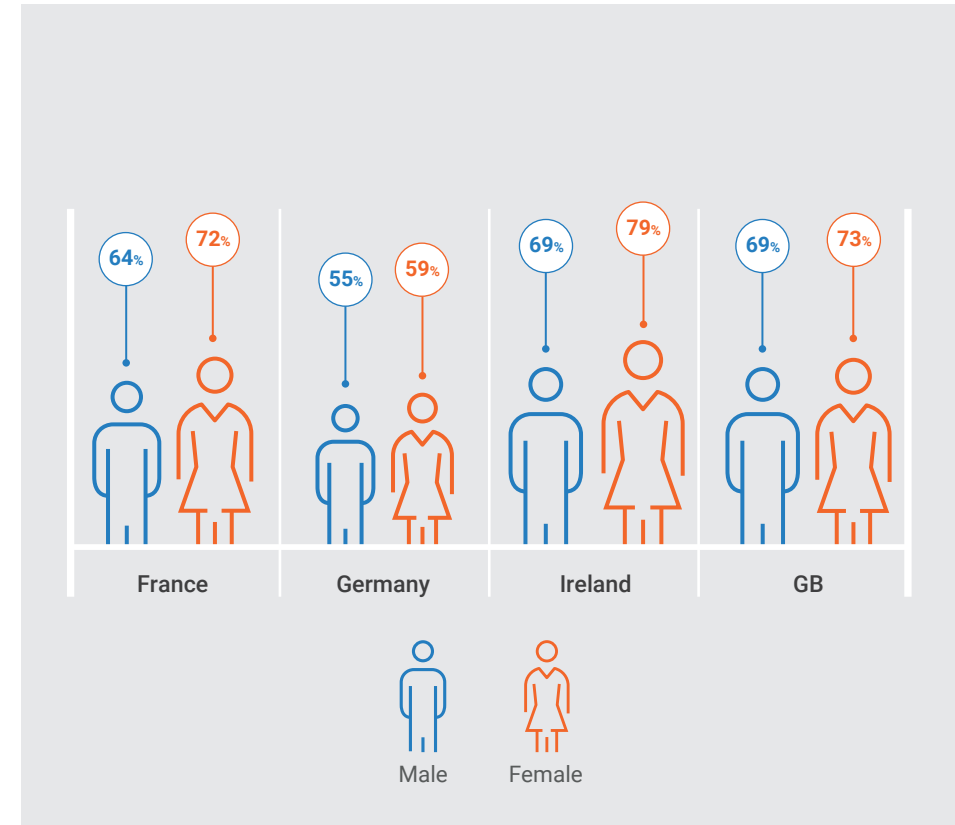
**Figure 4**

Concern about how personal data may be used in Germany and Ireland, by age



**Figure 5**

Concern about how personal data may be used, by gender



### Interesting fact

Previous studies tend to point to it being the younger cohorts who are more concerned about data privacy issues.

### 3. Consumers fear breaches and misuse



Across the board, the **top consumer concern**, by far, is **identity theft**, followed by the use of data for purposes other than those for which it was collected.

Across all countries:

#### Identity theft

Over 70% list identity theft as one of their top 5 concerns, and fully one-third of people say it is their greatest concern

—  
In all countries, concern about identity theft increases with age.

#### Use of data for other purposes

Around 60% list the *use of data for purposes other than that for which it was originally collected* in their top 5 concerns, with around 15% identifying it as their greatest concern.

—  
Here too, in all countries, concern generally increases with age.

#### Transfer of data outside of home country

Transfers of data outside the respondent's home country comes next.

—  
Except in Germany where transfers of data outside the home country, government surveillance, and health data misuse are all on an equal footing.

#### Health data

#### Government surveillance

*Health data misuse and government surveillance* are the next top concerns.



## Recent news

In April 2021 a landmark case was launched against Google, alleging that between 2011 and 2012 their cookies collected data on health, race, ethnicity, sexuality, and finance through Apple's Safari web browser, despite users having selected the 'do not track' privacy setting. The allegation of the illegal tracking of millions of iPhone users is set for the UK's Supreme Court, and seeks compensation for 4.4 million users.<sup>3</sup>

A similar case against TikTok has recently been launched by the former Children's Commissioner on behalf of millions of young people in the EU and the UK.

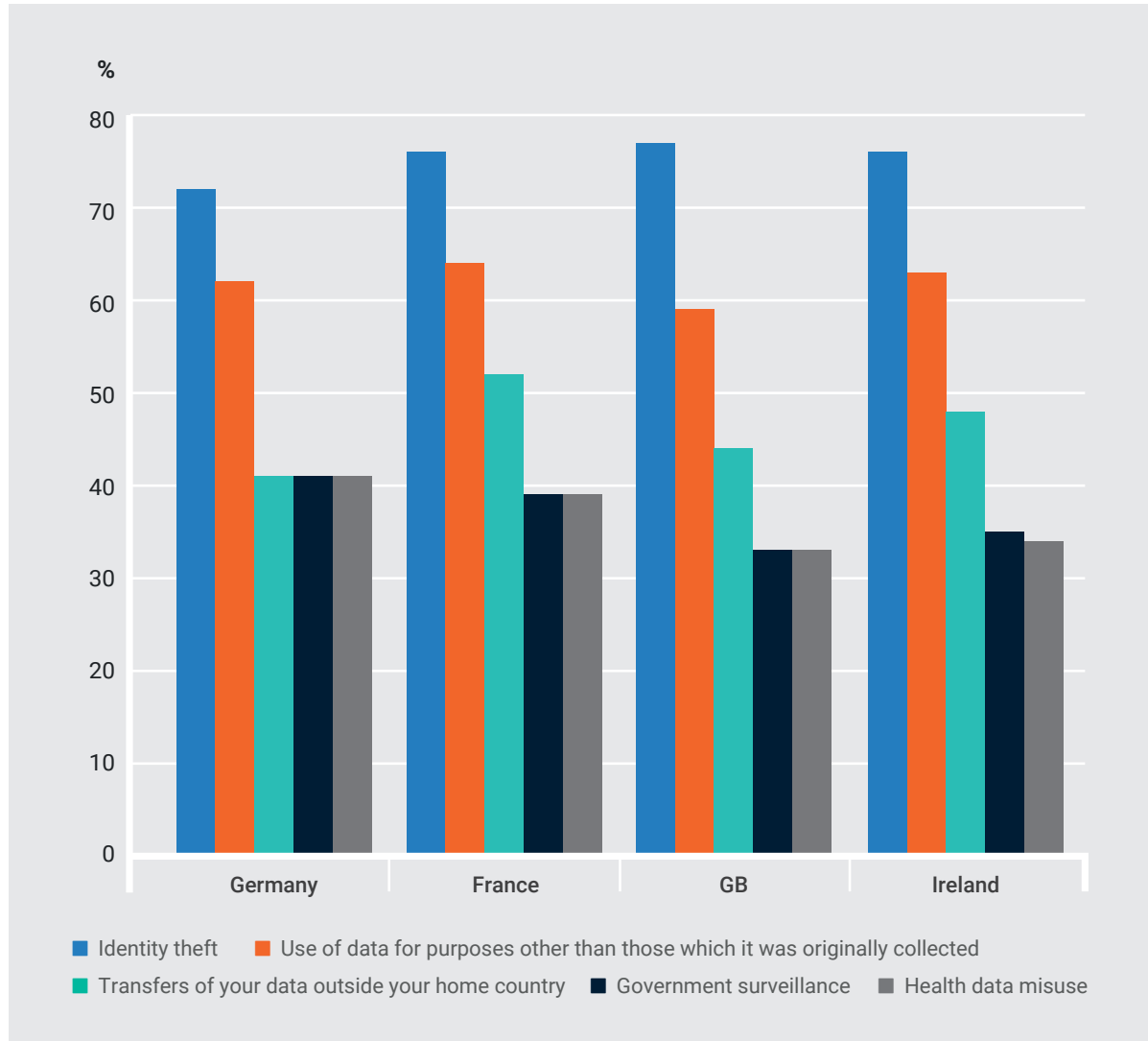


## Question

Has trust in companies and in government declined over the past few years, particularly amongst the middle aged and older?

**Figure 6**

Top 5 concerns on how personal data may be used



## 4. Privacy precedes purchasing



People today tend to pay **attention to privacy** prior to making a purchase.

Across all countries:

- Nearly everybody today pays some attention to personal data privacy before buying a product or service, with a remarkably even distribution across the age groups.
- At least 20% of consumers pay a great deal of attention to privacy before purchasing across all countries. In France it's nearly double that proportion.
- Only 1% to 3% never pay any attention at all.

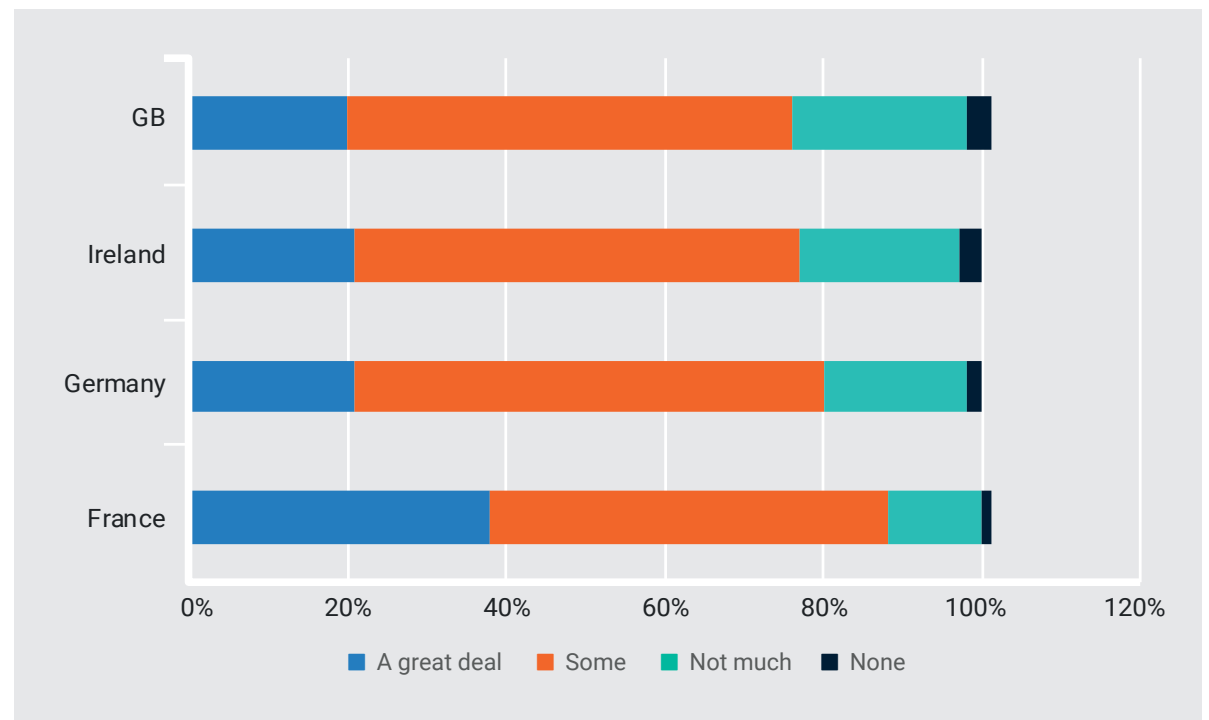


### Key finding

Between **76%** and nearly **90%** of consumers pay a **great deal of time** to **some time** to privacy prior to making a purchase.

**Figure 7**

Proportion of people who pay attention to privacy before making a purchase







## ACTION

Look at your brand and your privacy information through a consumer's eyes. How will they perceive your attitude to protecting their data? Will your public information and newsflow give them confidence?

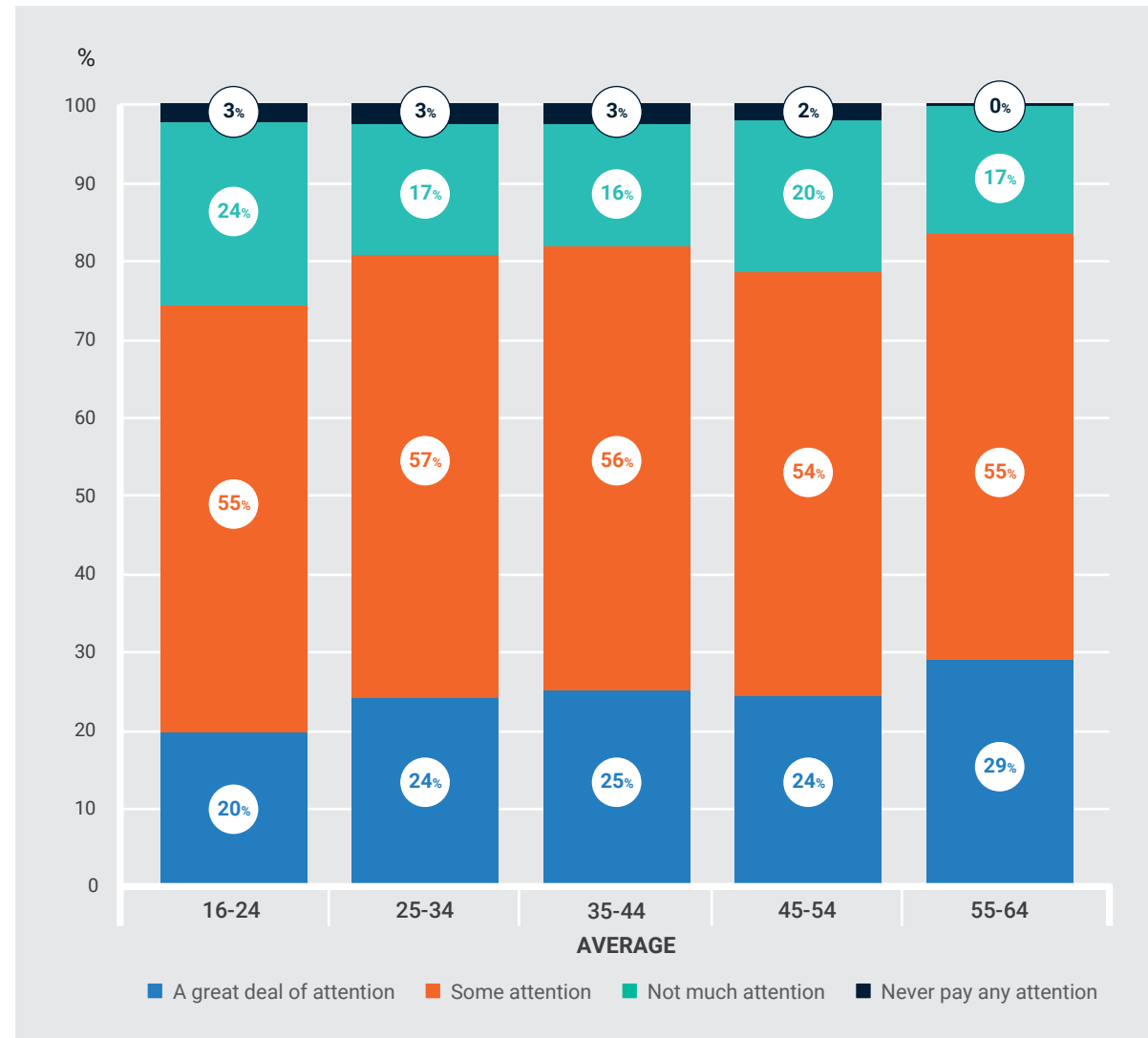


## Interesting fact

Deloitte found that tolerance for poor data privacy practice was declining back in 2016, and that more than twice as many respondents were less comfortable with sharing information now than in the previous year.<sup>4</sup>

**Figure 8**

Average levels of attention paid to privacy before purchase by age



## 5. Privacy adds value



Over one-third of consumers consider **better privacy more important than lower prices.**

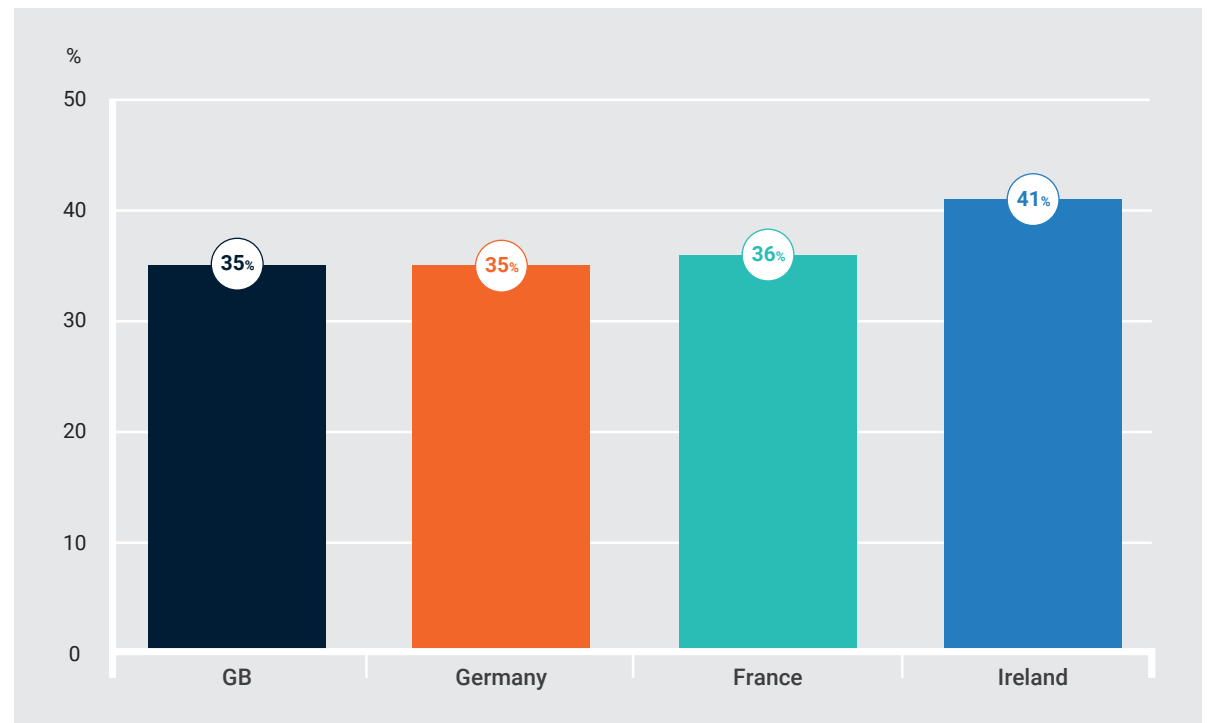
- This figure rises to over 40% for 55-64 year olds, in both GB and France.
- In Ireland 35-64 year olds are the most prepared to pay;
- In Germany it is the 25-34 year olds.

### Privacy is a right ... but it's also a **choice**

- Firms should consider charging a fee for services instead of expecting customers to pay with their personal data.
- Products and services can offer greater privacy than the legal minimum and charge a premium.
- Nothing is truly free – but many consumers appear willing to pay for the product rather than being the product.

**Figure 9**

Proportion of those willing to pay for better privacy





## ACTION

If you generate revenue from selling data, consider offering a paid service without data sharing instead. Even in the US “do not sell” opt-outs are becoming part of law - you can choose to lead instead of being forced to follow.

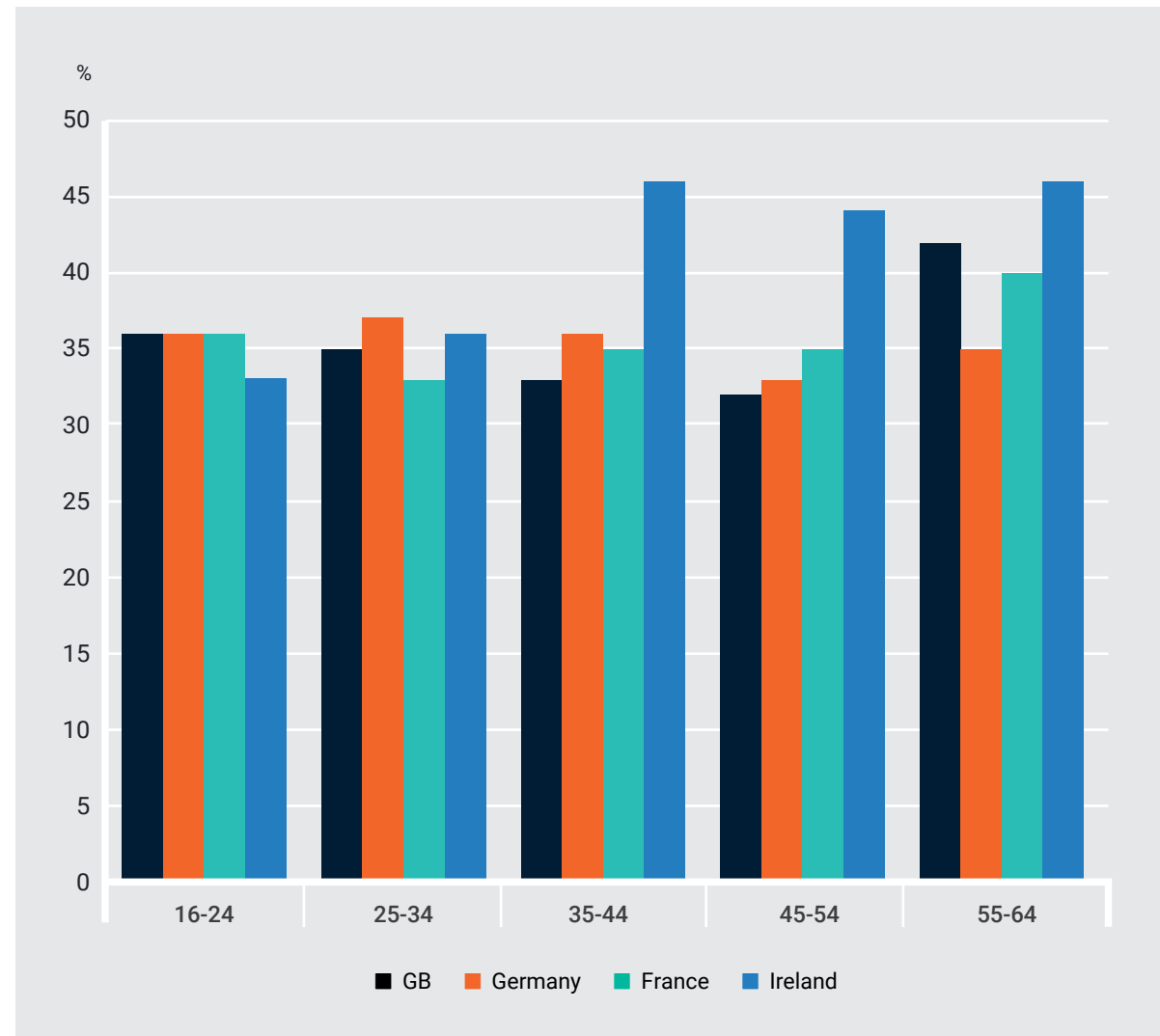


## Interesting fact

Research finds that companies tend to adopt a narrow approach to data privacy, focussing on the risks from poor data privacy rather than on the benefits that can be derived from good data privacy practices.

**Figure 10**

Percentage of those willing to pay for better privacy, by age



## 6. Good privacy attracts, poor privacy repels



Around two-thirds of consumers **modify their purchasing decisions** in line with supplier privacy commitments; and some 70% in GB, France, and Ireland **will not buy from a supplier** if they are concerned about their privacy behaviour.

- Nearly 70% of consumers in France and Germany have decided to buy a product or service specifically because of supplier commitment to consumer privacy; in Ireland the proportion was 65%, and in the UK 60%.
  - › In France and GB, 16-34 year olds are quite a bit more active.
  - › There is little discernible difference between gender in any of the countries; except in Ireland, where although men are more active overall, women make up a higher proportion of those who frequently act on privacy.
  - › In Germany, the 25-34s and over 55s do so most frequently, again with no discernible differences between genders.
- Similarly, around 70% have not gone through with an intended purchase due to privacy concerns; except in Germany where the figure is a bit lower, but still around 50%, and where it is the 25-34 year olds that are most active.



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Our research clearly demonstrates that privacy is a significant factor in buying decisions.

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- Across all countries, around 60% of people have cancelled or stopped buying a product because of privacy concerns.
- Those in Ireland are most active, where only 37% have never cancelled or stopped buying something because of concerns.



## Recent News

In January 2021, WhatsApp issued a new privacy policy that was not particularly clear, and was widely misinterpreted. Although WhatsApp soon issued a clarification, the backlash was fierce, with many users threatening to stop using the service.

In the week before the announcement, Signal (a competitor) was downloaded 246,000 times globally – the week after the announcement it was downloaded 8.8m times.<sup>5</sup>

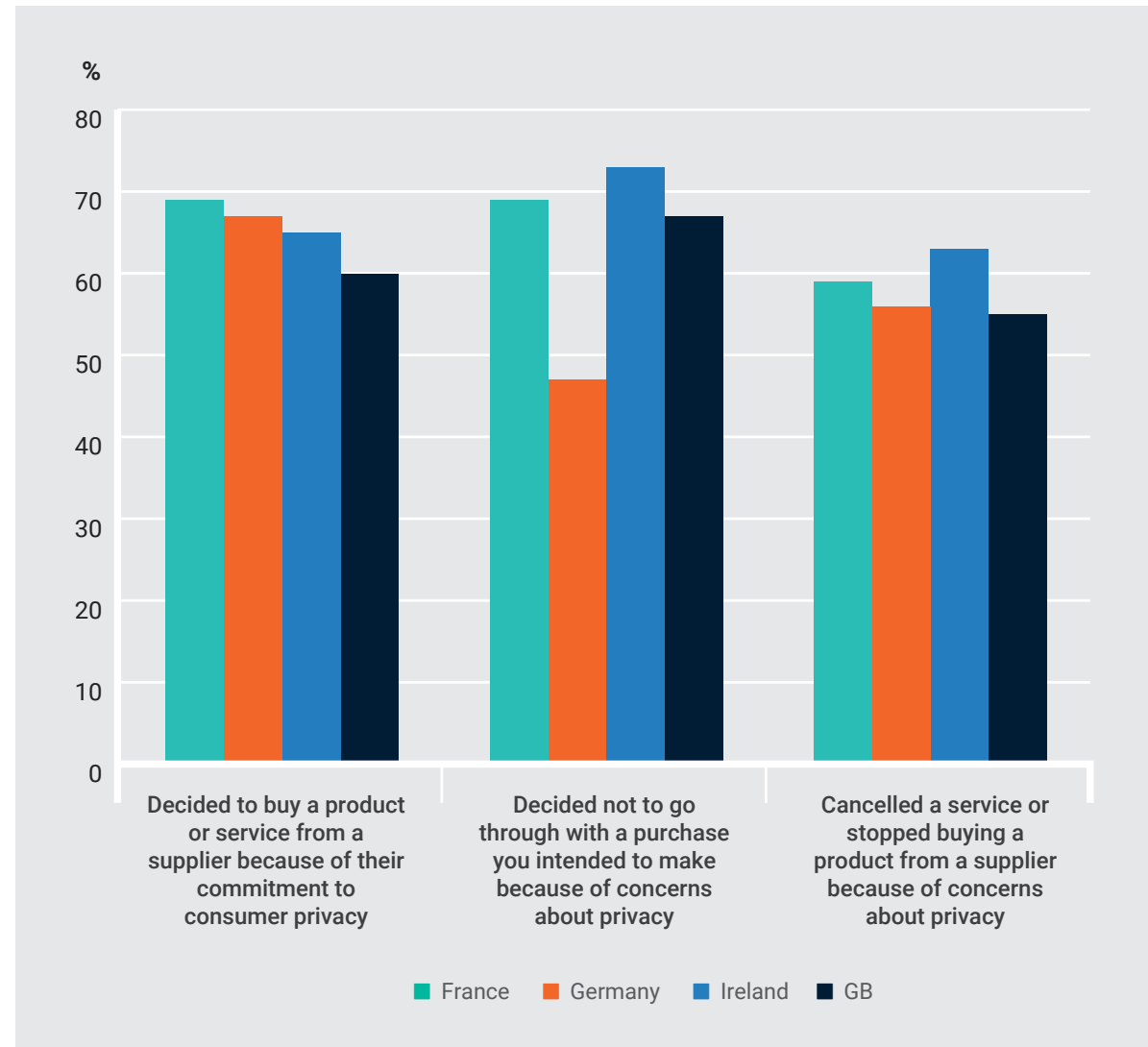


## Interesting fact

These results tally with previous research, which found that trust is important to consumers, and that it affects their behaviour. Indeed, 2020 data from Microsoft suggest that some 70% will not purchase from a brand once they have lost trust in it.

**Figure 11**

The impact on purchasing decisions of firms' commitments to consumer privacy



**Figure 12**

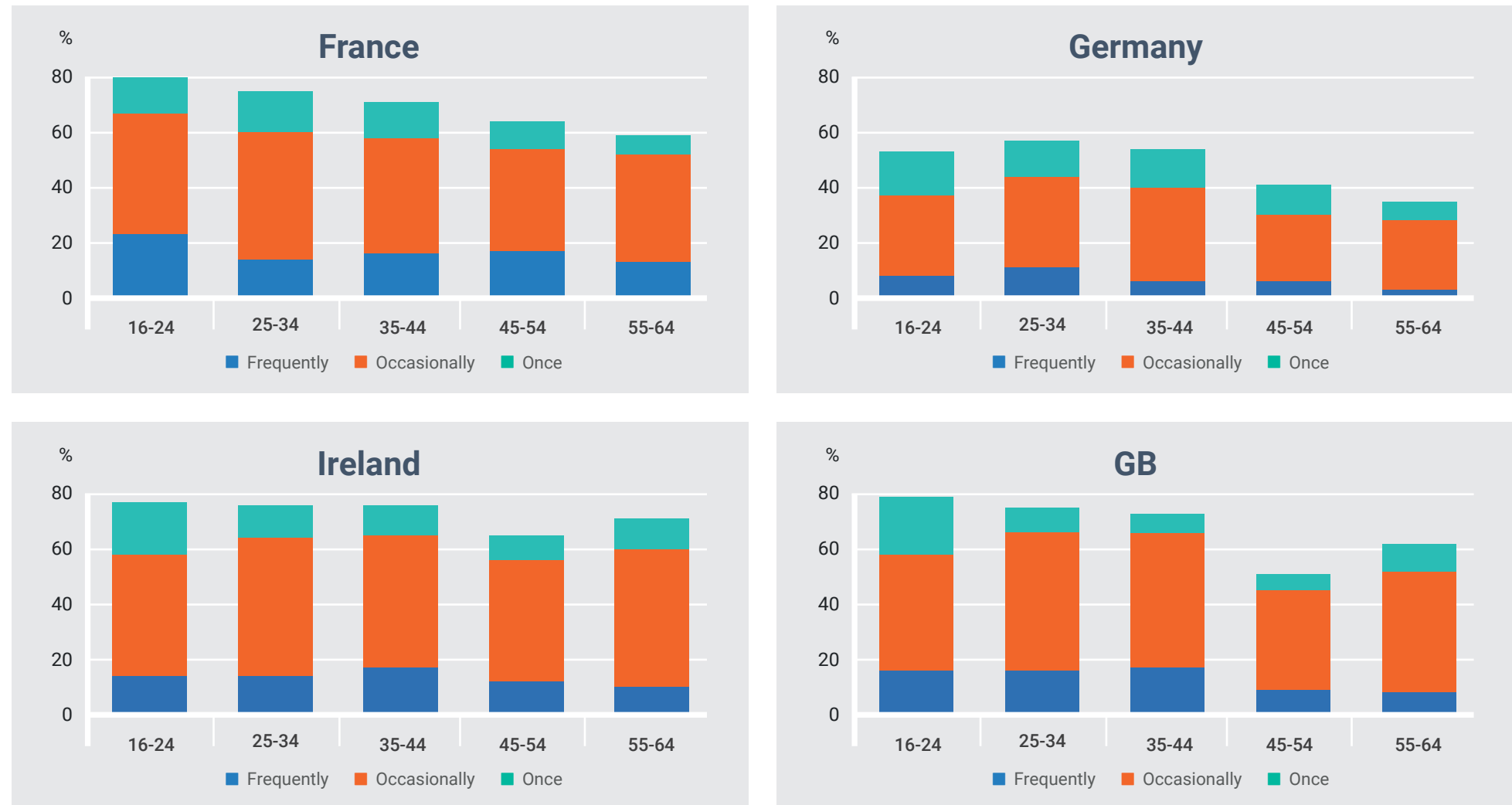
Frequency of purchases made because of a company's commitment to consumer privacy





**Figure 13**

Frequency of decisions not to go through with a purchase they intended to make because of concerns about privacy



**Figure 14**

Frequency of cancelling a service or stopping buying a product from a supplier because of concerns about privacy



## 7. Privacy drives trust



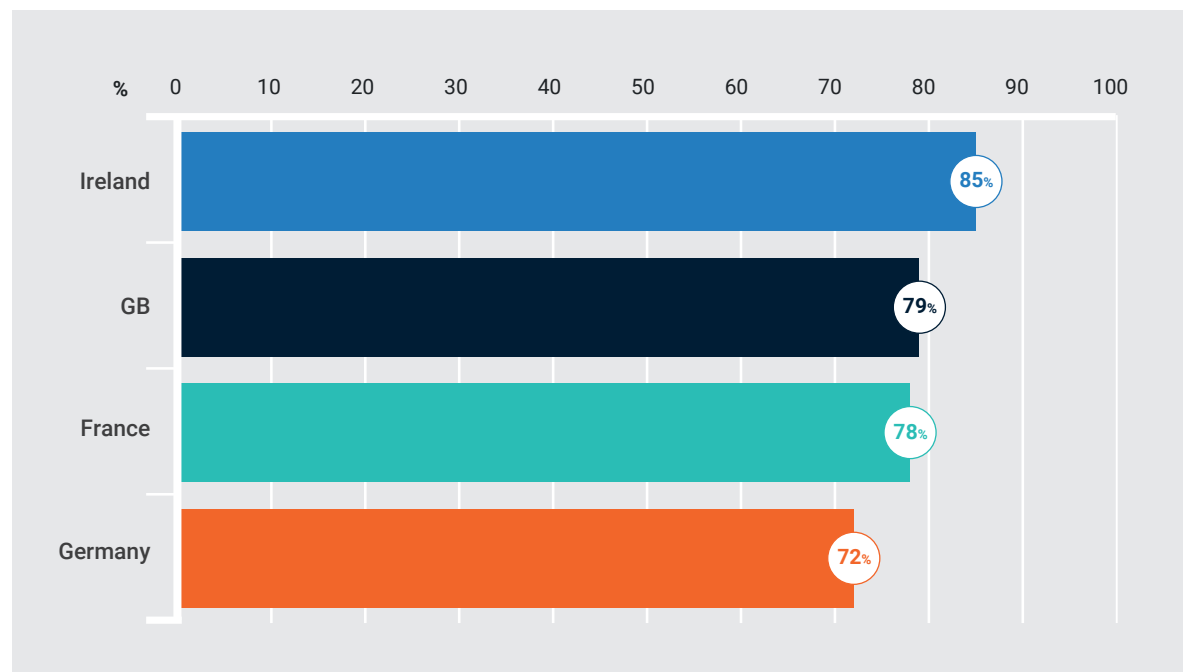
Four-fifths of consumers believe that **transparency is important** for trusting a company or brand.

- Those in Ireland attribute most importance to good privacy information, with nearly half rating it very important.
- In the UK, it is 35-44 year olds who judge it most important, and in Germany those over 55.
- Very few – just 2% to 3% in GB, France, and Ireland, and 5% in Germany – think that it is unimportant.

In GB, it is the 35-44 year olds who judge transparency as most important, whereas in Germany it is those over 55.

**Figure 15**

The importance of good privacy information for trusting a company or brand





## Interesting facts

Salesforce data from 2018 find that greater trust in a firm brings higher levels of customer expenditure, more frequent purchasing, improved customer loyalty, and an increased likelihood of the firm being recommended.<sup>6</sup>

PWC research of 2019 finds that data privacy accountability is particularly important to the B2B market, where non-transparency can cause costly frictions to business processes.<sup>7</sup>

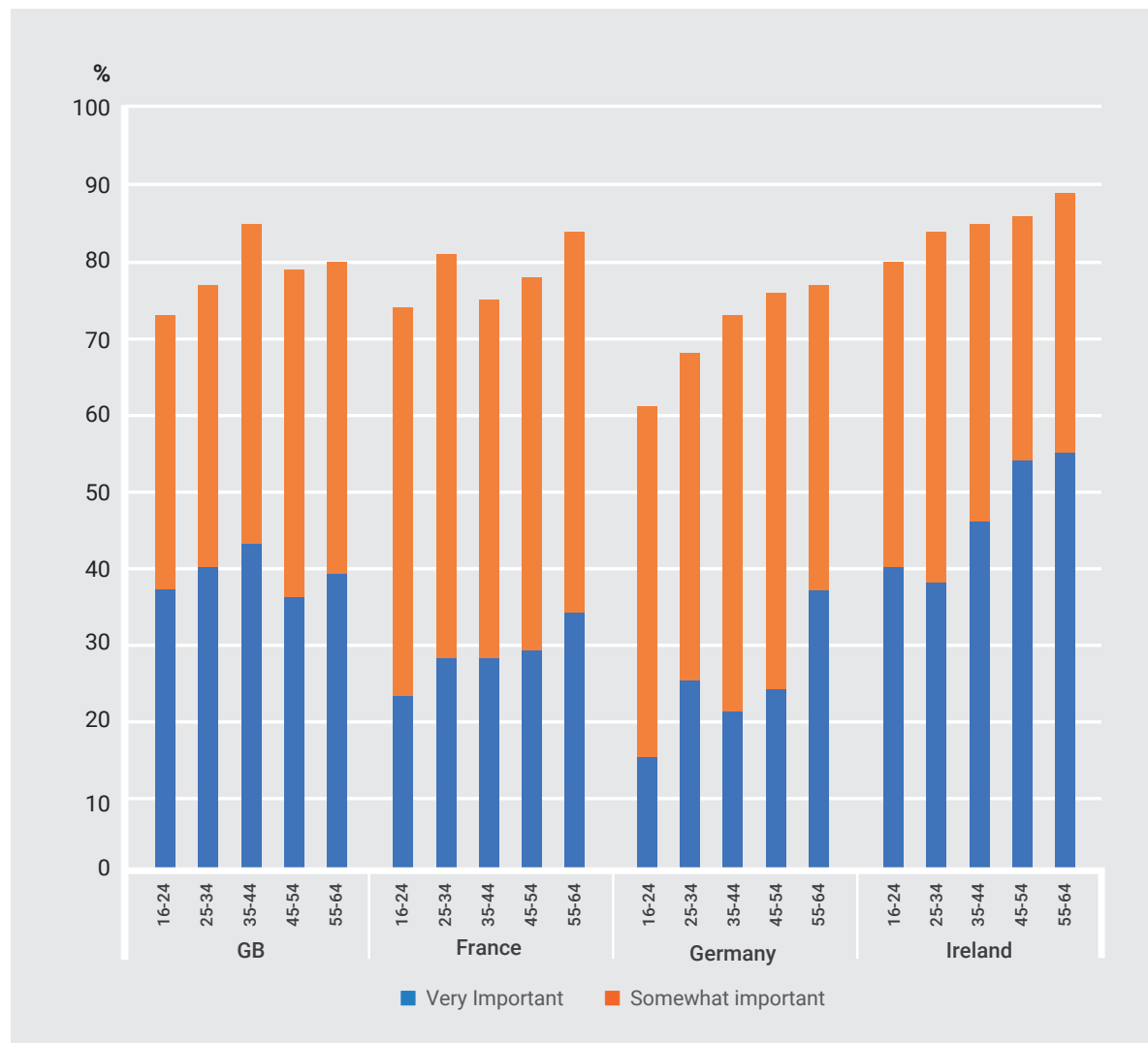


## Question

Are we in a new age of privacy? When did it start?

**Figure 16**

The importance of good privacy information for trusting a company or brand, by age



## 8. Good privacy helps marketing engagement



**70% of consumers are more likely to accept cookies and emails from companies with good privacy information**

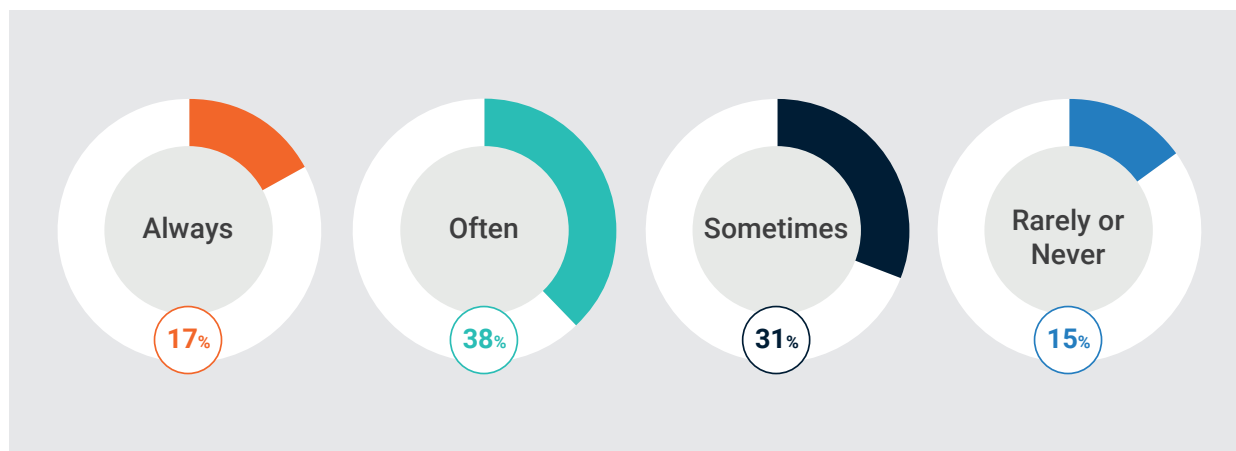
- On average across all countries just under half of consumers routinely decline cookies and marketing emails, with only 17% always accepting them.
- These findings are fairly uniform, with those least likely to accept them aged 35+ for all countries.
  - › Interestingly however, 16-24 year olds in GB but 55-64 year olds in France are the most likely never to accept them at all!
- In Germany, two-thirds of people are more likely to accept cookies or sign up to marketing emails from firms that provide good privacy information from the start.
- Across all countries, people in households where the chief income earner holds a higher managerial position are much more likely to respond positively, except in France where it is those in semi/unskilled manual roles.

**But give them good privacy information and they are much more likely to.**

- In GB and France, at just over 70%, it is more likely still; and at nearly 80% in Ireland it is most likely.
  - › The greatest impact in GB appears to be on the younger cohorts.
  - › For the other countries, however, impacts are more evenly distributed across the age range.
  - › And in Ireland it is greatest with the 55-64 year olds.

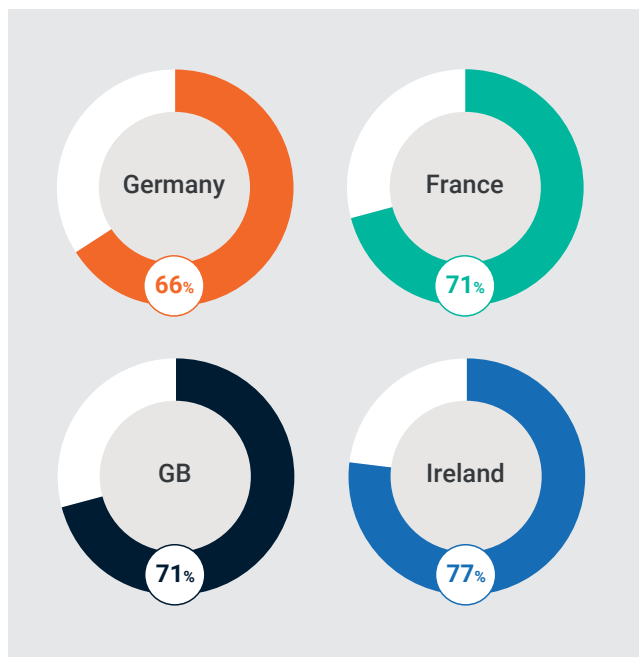
**Figure 17**

Frequency of accepting cookies and emails – all country average



**Figure 18**

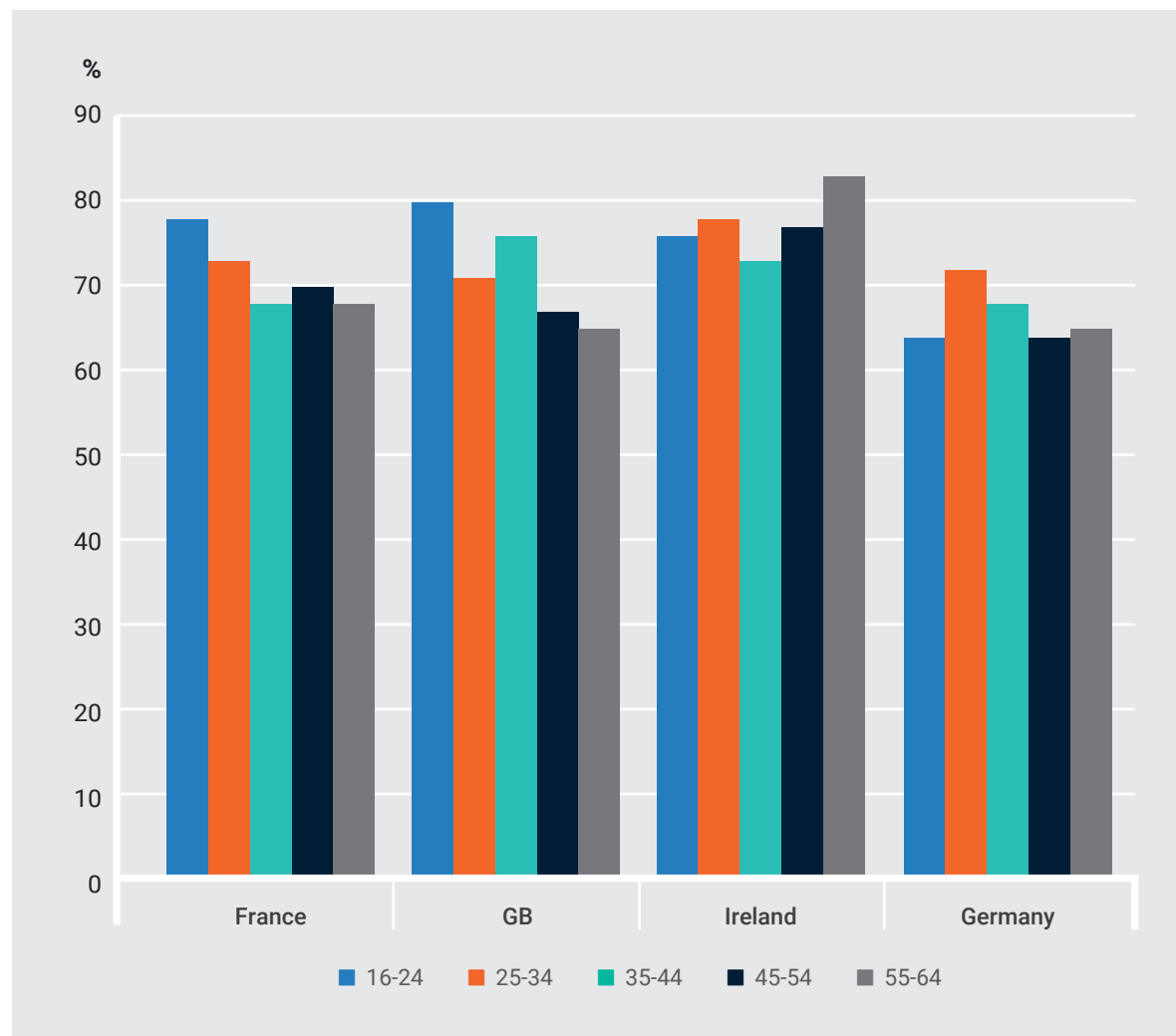
The increased likelihood of accepting cookies or marketing emails from companies providing good privacy information from the start



Our research shows that providing clear privacy information and effective consent management will improve opt-in rates and increase marketing reach.

**Figure 19**

The increased likelihood of accepting cookies or marketing emails from companies providing good privacy information from the start, by age







## ACTION

A/B test variations on privacy information content and presentation, and different choices of cookie and email consent to prove to yourself that you can improve opt-in rates by being more transparent and giving consumers greater control.

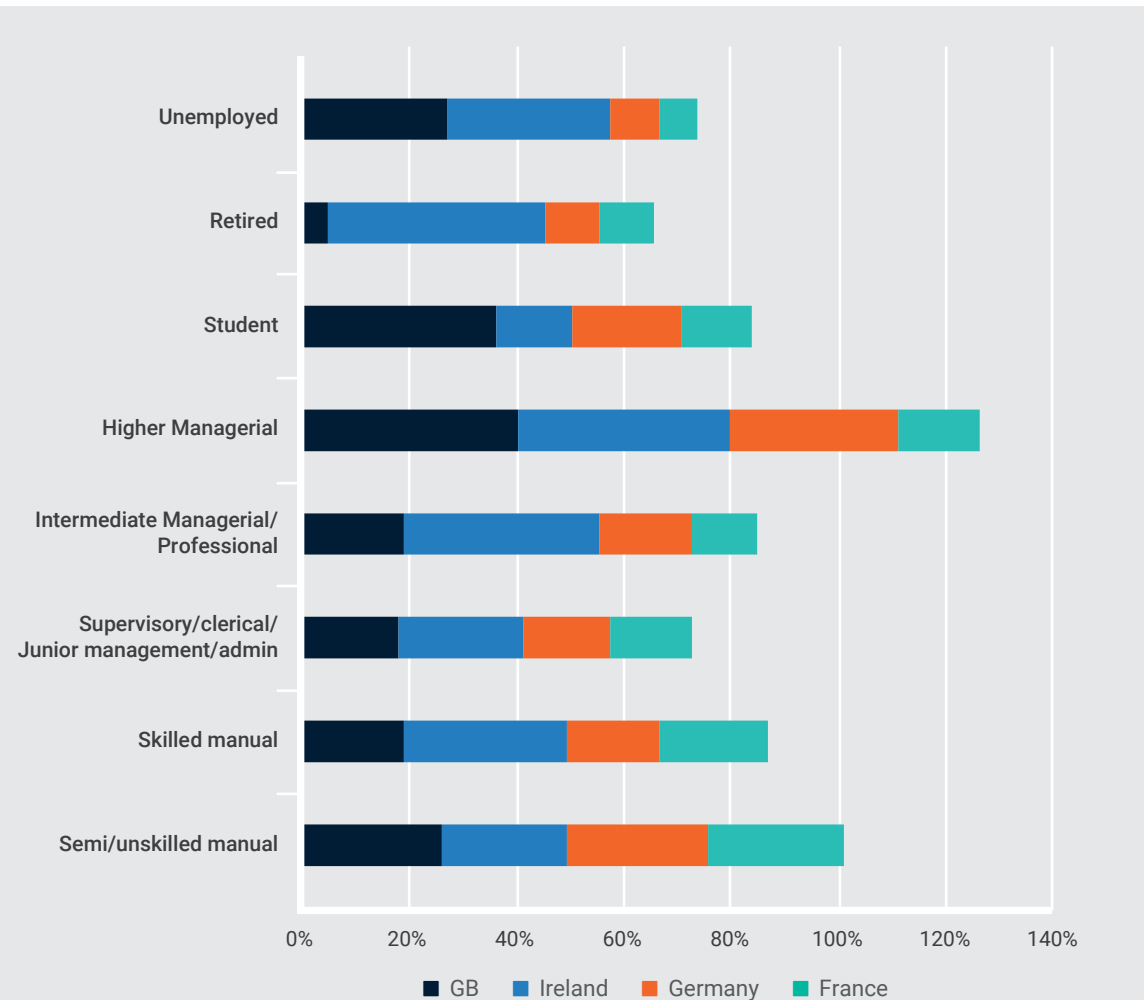


## Interesting fact

Salesforce data also show that most customers are wary of firms' intentions, feel vulnerable, and do not believe that they have their best interest in mind or that their information is safe.<sup>8</sup>

**Figure 20**

The increased likelihood of those 'much more likely' to accept cookies or marketing emails from companies providing good privacy information from the start, by occupation of household chief income earner



## 9. Consumers know their rights



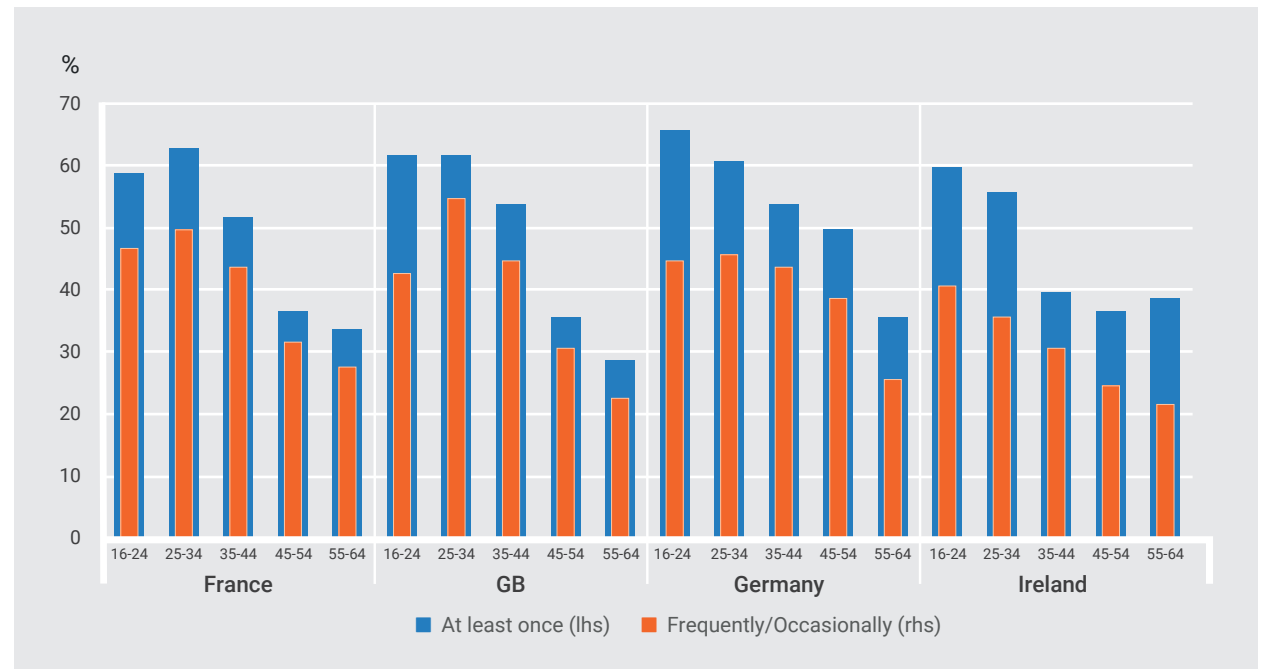
Some **50%** of people have **exercised their rights** over their data.

In all countries:

- The younger cohorts 16-24, 25-34, and 35-44 are the most active in exercising their rights in this area, e.g. by requesting: copies of personal data held; a correction or deletion; processing of data to be stopped; or data not to be sold on.
- Men are generally more active in this area than women;
- 'Occupationally', it is students who are the most active, except in Germany, where it is those in higher managerial positions.

**Figure 21**

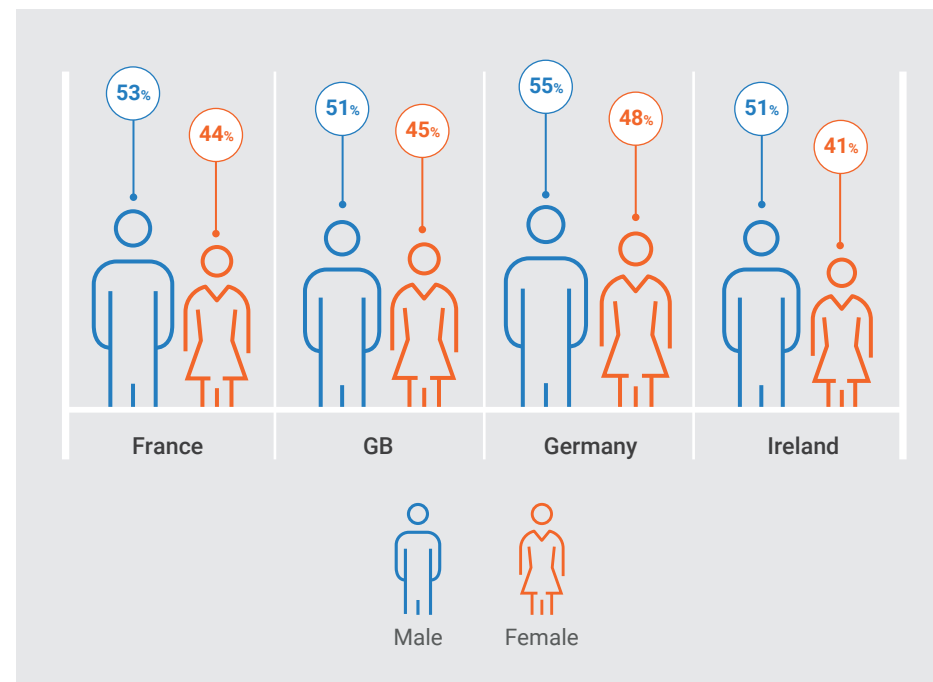
How often people exercise their rights over their data



Subject Access Requests are on the rise. Clear privacy information, good privacy practices and self-service preference management can help you manage demand and improve the data subject's experience.

**Figure 22**

Percentage who have exercised their rights over their data privacy, by gender

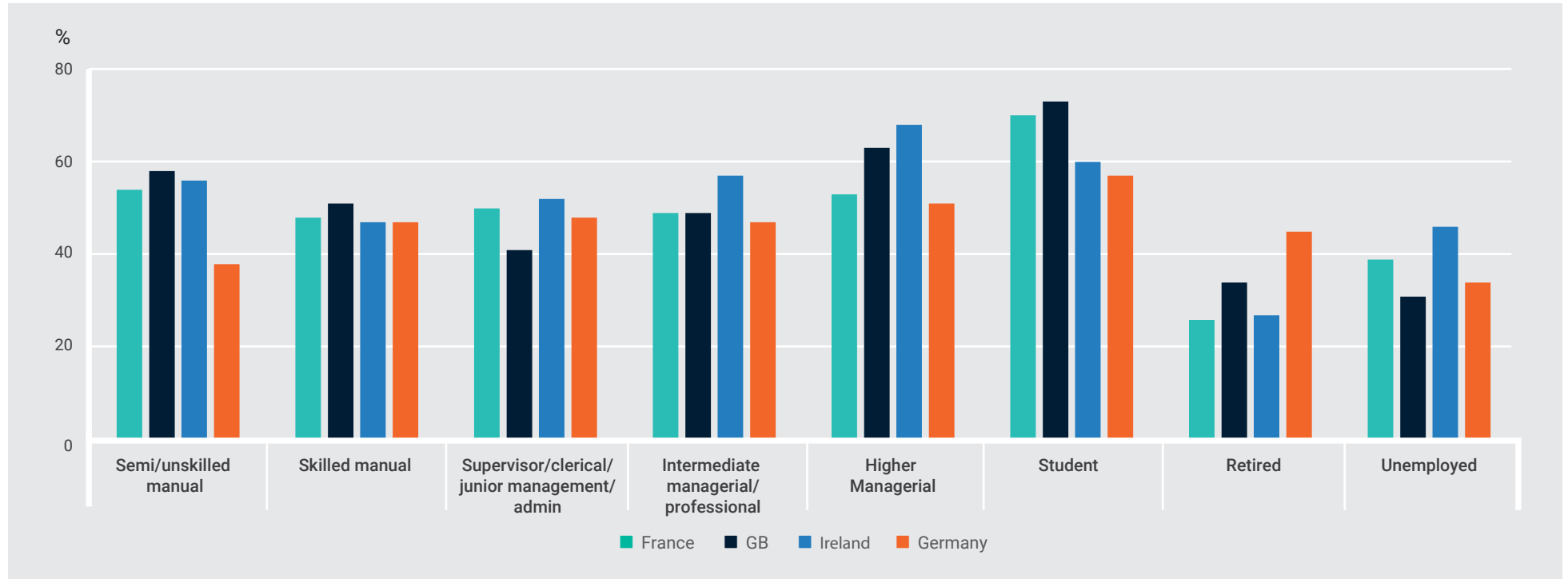


### Interesting fact

Apple's planned privacy update, announced in April 2021, was to ask users if they consent to being tracked "across apps and websites owned by other companies" for advertising purposes. It has been estimated that Facebook could face a 7% decline in second quarter revenue – nearly \$2 billion – if 80% of its users block the company from tracking them on iPhones.<sup>9</sup>

**Figure 23**

Percentage who have exercised their rights over their data privacy, by occupation of household chief income earner



## Looking to the future

Our study shows that students are the most likely to have exercised their data subject rights (with the exception of Ireland).

Just under 70% of young adults were enrolled in tertiary education across our surveyed

countries. Low: Germany 61%, high: Ireland 77%, source: World Bank<sup>10</sup>.

Will attitudes to privacy and rights acquired as students persist as this cohort enters the workforce?

# Conclusions

In the first phase of our research, we showed that ethical behaviour, including exemplary privacy, builds trust and commercial value. In this phase, we dug further into consumer behaviour.

We found that consumers are confident that they understand the meaning of personal data and are concerned about misuse of their data. Their concerns fell into two groups:

- Inappropriate access to their data by others, such as identity theft or surveillance.
- Use of data by the organisation for purposes beyond those for which the customer believes data was provided.

We also found that almost all customers report acting on these concerns, paying attention to privacy when selecting products and services. Over a third reported choosing those with good privacy in preference to those with lower prices but with less respect for their privacy.

The research supports our assertion that organisations which demonstrate respect for customer privacy will have their products and services valued more highly.



## ACTIONS

1. **Review the ways in which you use customer data** and how you protect it, making sure that purposes are clear and limited and that security measures are practical and appropriate.
2. **Work with your marketing team to review your privacy information and consent mechanisms through the eyes of the customer**, to check that you are clear about the purposes for which you use personal data and the measures which you have in place to protect that data. Avoid privacy jargon and vague statements such as having “appropriate organisational and technical measures” in place.
3. **A/B test privacy notice wordings with consumers** to test the impact on opt-in rates for consent-based processing.
4. **Review your commercial model** if this currently relies on selling customer data, offering a chargeable service at a fair price which preserves privacy.



## About this research

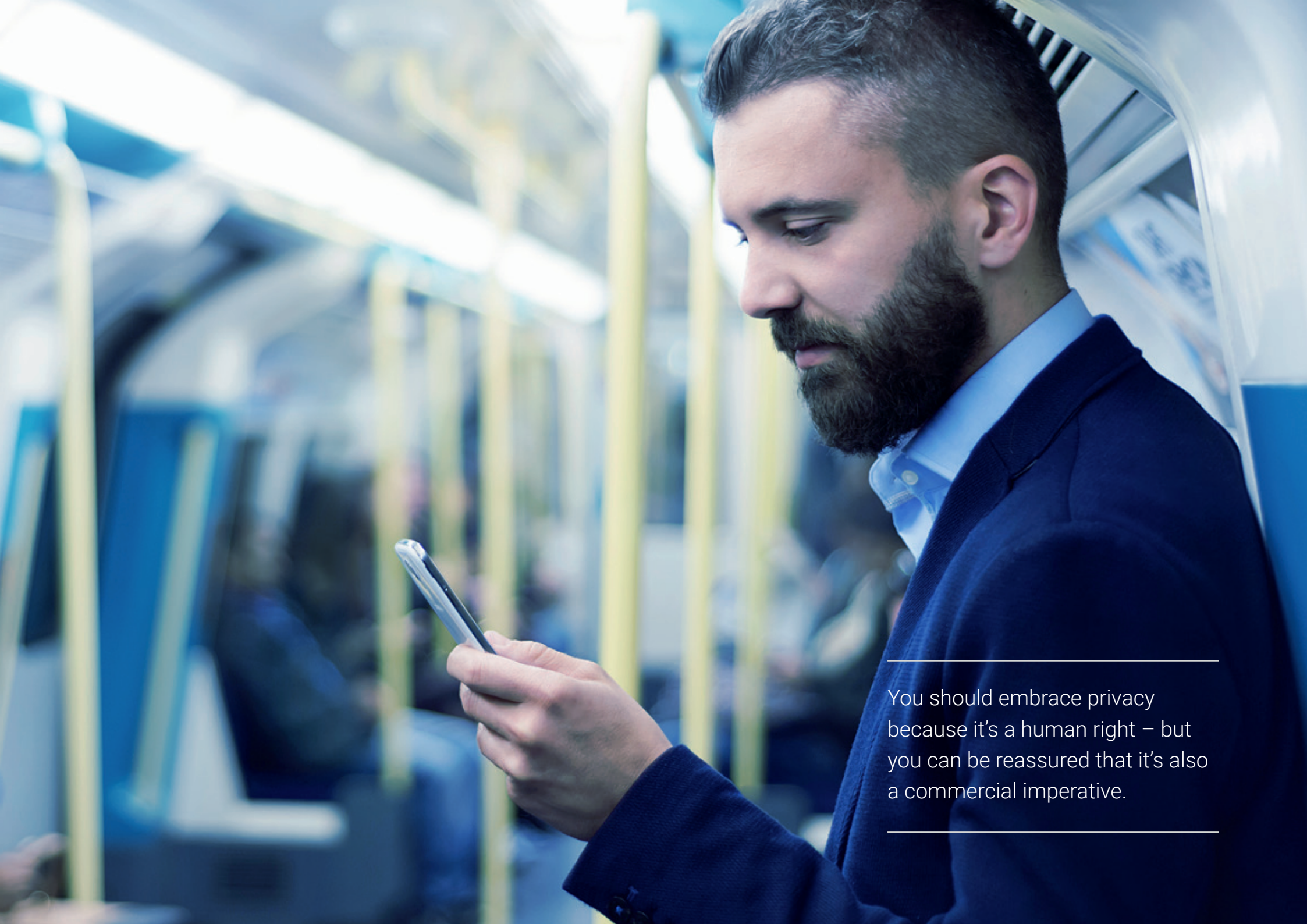
This report presents independent research funded by Securys Limited. The research is based on a survey by Kantar of 4,137 adults across GB, Ireland, France and Germany, weighted to represent adult population, surveyed 25/02/2021-01/03/2021. Copyrighted material is referenced in this report on the basis of fair use for research purposes; the moral rights of the original authors are recognised. Links in this document are provided for the convenience of the reader and Securys is not responsible for the availability or content of these external sites.

# KANTAR

# Endnotes and references

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You should embrace privacy because it's a human right – but you can be reassured that it's also a commercial imperative.

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# About Securys

Securys is a specialist data privacy consultancy with a difference.

We're not a law firm, but we employ lawyers. We're not a cybersecurity business but our staff qualifications include CISSP and CISA. We're not selling a one-size-fits-all tech product, but we've built proprietary tools and techniques that work with the class-leading GRC products to simplify and streamline the hardest tasks in assuring privacy. We're corporate members of the IAPP, and all our staff are required to obtain one of more IAPP certifications. We're ISO 27001 and ISO 27701 certified and have a comprehensive set of policies and frameworks to help our clients achieve and maintain certification. Our relentless focus is on practical operational delivery of effective data privacy for all your stakeholders.

We're not just a consultancy. We're your privacy engine room. We can stand in your boardroom and do strategy with the best of them, and work with your compliance teams to solve knotty problems. We can audit your compliance and deliver drillable risk dashboards across the organisation. But above all, we can get involved at ground level and help your frontline teams get the job done. That's Privacy Made Practical®.

