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Transforming Customer Data Management

Bridging The Gap Between Consumer Privacy
And People-Based Marketing

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Project Director:

Nicholas Phelps,
Senior Market Impact Consultant

Contributing Research:

Forrester's B2C Marketing
research group

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Executive Summary

In the past 10–15 years, marketers have seen an explosion in their programs' sophistication and capabilities. Marketing entered a golden age powered by the ability to target audiences for media buying, glean audience insights and determine the best course for campaigns, and personalize marketing experiences for the consumer. However, these capabilities rely on gathering, interpreting, and acting upon considerable stores of consumer data, creating a dependency that now places them in a precarious situation.¹

Neustar commissioned Forrester Consulting to evaluate how brands are adjusting their customer data strategies in the face of shifts in the marketing landscape. Forrester conducted an online survey with 471 respondents representing privacy, marketing, and analytics teams at US enterprises to explore this topic. We found that while brands are keenly aware of the shifts happening in customer data, they struggle to meet the moment with comprehensive, identity-based strategies that would let them simultaneously tackle issues of privacy management, data governance, and marketing management.

KEY FINDINGS

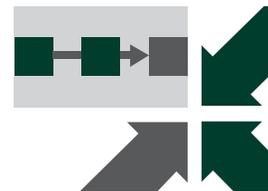
- › **Brands are concerned over the future state of their customer data responsibilities and capabilities.** New and restrictive legislation, browser and device protections, and walled-garden ecosystems are straining B2C marketing organizations who are concerned about how consumer data is defined and how much will be available to power modern marketing experiences. They have responded to these shifts by focusing heavily on data ethics strategies; however, privacy rules and regulations are still often viewed as a hindrance to advanced marketing today, rather than as an essential element of a comprehensive marketing strategy.
- › **Lack of cohesive strategies and coordination between privacy, analytics, and marketing teams hinders brands' preparedness.** The systemic threats posed by these changes require brands to go beyond siloed improvements for privacy management, data governance, and marketing management. Unfortunately, most brands appear to be more concerned about these shifts than they are prepared to comprehensively tackle them. Brands have made the most gains with privacy management, but they struggle to simultaneously run effective privacy management, data governance, and marketing management workflows.
- › **Identity resolution can act as a bridge across the three pillars of modern B2C marketing.** Brands with strategies that treat privacy management, data governance, and marketing management as three separate pillars will face fractured strategies, workflows, and teams who will struggle to effectively operate in a disrupted customer data environment. Instead, brands should use identity resolution as the glue that holds those three pillars together — providing clearly defined customer data that aids data governance and future-proofs cross-channel, personalized marketing experiences.

Brands Know The Data Deprecation Wave Is Coming

New privacy laws, browser and device protections, and walled-garden ecosystems are vastly limiting brands' access to the consumer insights that drive modern digital marketing experiences.² Even though brands in this study have shown that they are highly aware of the risks posed to their marketing strategies, they tend to think of oncoming shifts as siloed challenges that require siloed solutions. In this view, privacy teams should address compliance and data ethics concerns, while analytics and marketing teams should address how to execute tasks in their own lanes. This lack of comprehensive response across all three pillars of data-driven marketing threatens to leave brands unprepared for the future.

Specifically, a majority of brands reported they are concerned with shifts in consumer data that include changes to how personal information is defined, shifts in their ability to manage cross-channel marketing programs, and the advent of increasingly restrictive rules that govern consumer privacy laws (see Figure 1).

The significant concern around new definitions for what is considered personally identifiable information (PII) reveals a long-standing tension between balancing privacy and marketing efficacy. Namely, if data is determined to be PII by an organizations' privacy team, then rules kick in for how the marketing and analytics teams use that data. Marketing and analytics teams don't typically consider data governance their problem, since it isn't explicitly a part of these teams' work, goals, or objectives. Rather, marketing and analytics teams' focus aligns more with how to use data, as opposed to ensuring its ethical use. The result is privacy considerations which are too often seen as a hindrance to marketing, rather than an essential element that should inform how privacy, marketing, and analytics workflows must align.



Brands err by treating oncoming marketing shifts as siloed challenges that require siloed solutions.

Figure 1

“How would you rate your organizations’ level of concern with each of the following shifts in the B2C marketing landscape?”



Concern is high among brands who must adjust to the shifting consumer data landscape in order to power modern marketing capabilities.

Base: 471 marketing, data analytics, and legal privacy leaders at US B2C enterprises
Source: A commissioned study conducted by Forrester Consulting on behalf of Neustar, October 2020

BRANDS RESPOND TO MARKETING SHIFTS BY DOUBLING DOWN ON DATA ETHICS, COLLECTION, AND GOVERNANCE

As marketing fundamentals shift, so too must the strategies put in place to navigate them. For example, respondents are placing greater emphasis on strategies governing data ethics, data management, and distribution, and they are showing greater openness to consultative services that can help guide their path to resolving changes in their industry. The issue is that when brands rethink their priorities, they run the risk of overlooking important tactical levers that can improve their ability to manage customer data. While the majority of brands indicated that their approach to harnessing customer identity would become increasingly important, it received less focus than data ethics and management measures (see Figure 2).



Brands' siloed approach to data ethics and data usage results in friction between privacy teams and marketing and analytics teams.

Figure 2

“Given the changes occurring in your industry, how will your organization’s views change on how important each of the following will be to successful customer marketing?”



Base: 471 marketing, data analytics, and legal privacy leaders at US B2C enterprises
Source: A commissioned study conducted by Forrester Consulting on behalf of Neustar, October 2020

Brands show less focus on identifying comprehensive strategies for establishing and managing customer identities, focusing instead on data ethics and management.

This issue is brought into stark relief when analyzing brands' tactical priorities and responses to the future of customer data, which indicate that brands are not dealing with these risks in a unified way. Just 14% of respondents indicated that investing in a universal ID or identity resolution solution would be among their most important priorities, which is less than half the number of those who either plan to increase their investment in customer analytics or data science capabilities or plan to enhance their campaign targeting and cross-channel audience planning programs. High-level challenges like ethics still need to be translated across the organization into tactical and coordinated practices, but brands are less equipped to handle and communicate these detailed plans.

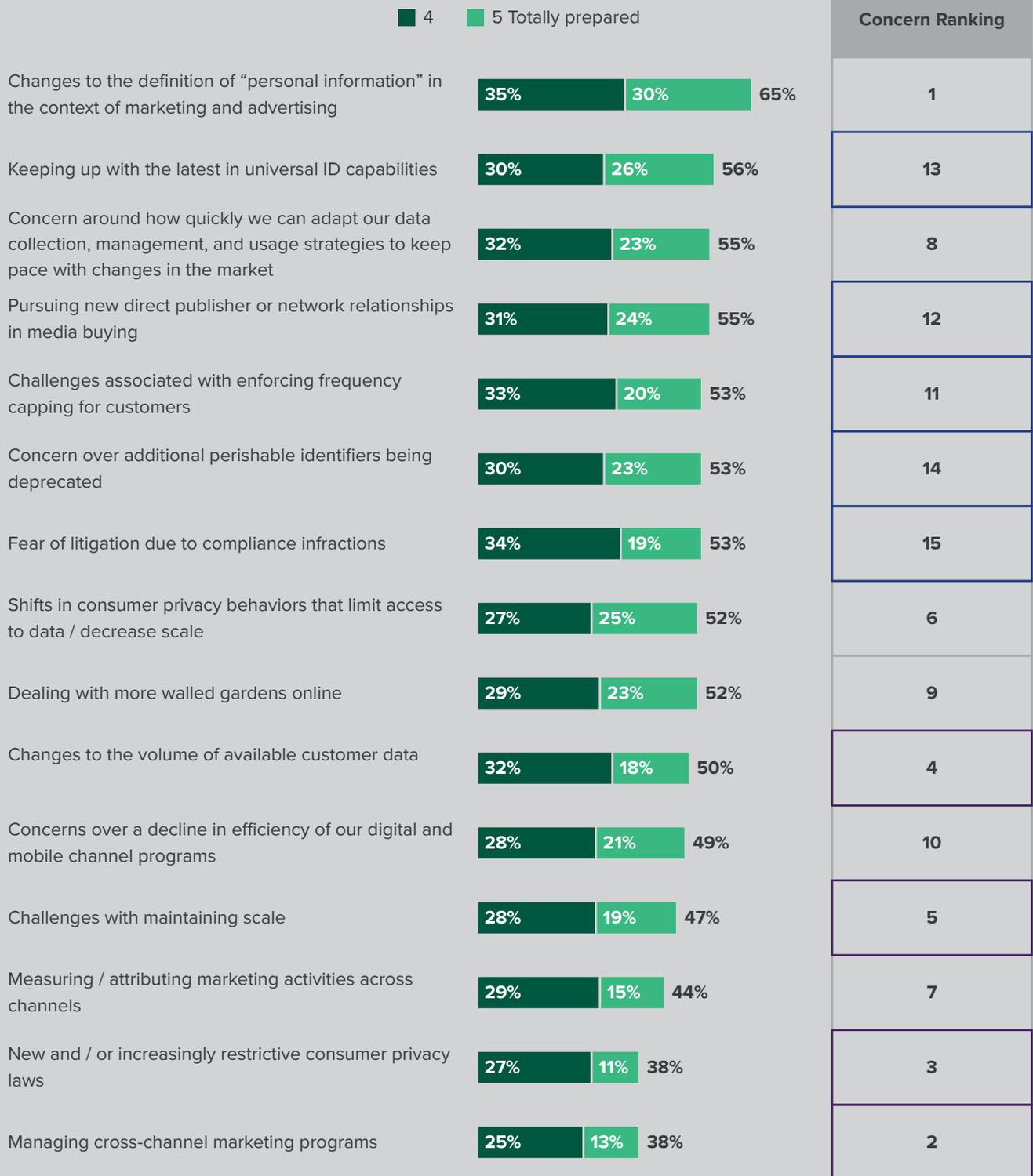
Too Many Brands Struggle To Develop Comprehensive Data Strategies

Brands know that their strategies must shift in the face of continual data disruption; however, they appear to be far more concerned about these shifts than they are prepared to address them. To investigate this, the study compared brands' ranking of how prepared they feel to address each shift, with a concern ranking illustrating how worried they are about each respective change in the marketing landscape. While shifting PII definitions represent both brands' top area of concern and the area they feel most prepared to address, they often struggle to explain how they plan to respond through coordinated tactical shifts and planning. Take for example the following: Customer data disruption will pose significant challenges to the execution of cross-channel marketing programs. This represents respondents' second highest area of concern, and also the area they feel least prepared to address. Similarly, the advent of new and increasingly restrictive privacy laws like CCPA, CPRA, etc., represents brands' third strongest area of concern, and the area they are second-to-least prepared to address.³ This reflects a lack of comprehensive planning and strategy to deal with both cause and solution (see Figure 3).

A Universal ID is a single identifier that recognizes individual user identity across different platforms.

Figure 3

“How would you rate your organization’s level of preparedness for each of the following shifts in the B2C marketing landscape?”



Base: 471 marketing, data analytics, and legal privacy leaders at US B2C enterprises
 Source: A commissioned study conducted by Forrester Consulting on behalf of Neustar, October 2020

CUSTOMER DATA STRATEGIES ARE REVEALED TO BE BOTH UNOPTIMIZED AND PERSISTENT

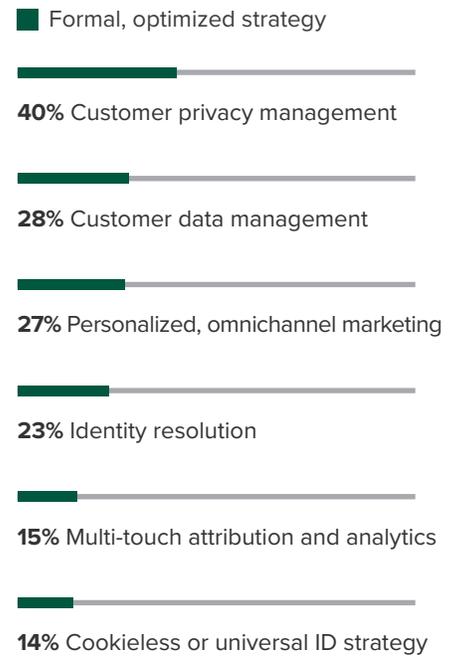
Brands need to find their unique way of addressing data disruption. This begins by taking control over their data strategies, their partnerships, and their customer relationships. Today, brands' most significant progress has been made on reinforcing customer trust. For example, 40% of respondents reported that their strategies for customer privacy management are currently optimized, while 28% claimed to have optimized strategies for customer data management.

However, brands are less prepared when it comes to activating that data into marketing programs. Just over a quarter believe their strategies for delivering personalized, omnichannel marketing experiences are at their full potential today — indicating a capability gap with the 81% of respondents who were concerned with the future impact of shifts in B2C marketing on delivering cross-channel programs. And when it comes to the identity resolution and universal ID strategies that would power future marketing programs in a cookieless world, just 23% and 14% have an optimized strategy in place today, respectively (see Figure 4).

Shifts in the B2C marketing landscape are still in the process of unfolding, so brands shouldn't be too harshly criticized for this current state. Nevertheless, there is a need to start addressing these issues today in hopes of being prepared for the near future. What is potentially more concerning is that brands appear to be both sub-optimal today and likely to stay that way for the near future. There will not be a one-size-fits-all approach to solve for the deprecation of IDs or privacy governance. Rather, significant focus will be required for connecting the privacy organization with the marketing and analytics teams. This all must begin now, before these IDs are eliminated completely. Unfortunately, it's far less likely that brands will have fresh strategies to specifically address post-cookie marketing, as just 36% have or plan to update their universal ID strategies within 12 months.

Figure 4

“How would you rate your organization's level of preparedness for each of the following shifts in the B2C marketing landscape?”



Base: 471 marketing, data analytics, and legal privacy leaders at US B2C enterprises
Source: A commissioned study conducted by Forrester Consulting on behalf of Neustar, October 2020

Privacy Management Shows The Most Progress Among Brands

In order to prepare for the multiple sea changes in B2C marketing, brands must simultaneously develop and mature their practices across three primary areas: privacy management, data governance, and marketing management, with use cases like personalization and omnichannel measurement. Brands in this study demonstrated that more progress has been made in privacy management than in data governance or marketing management.

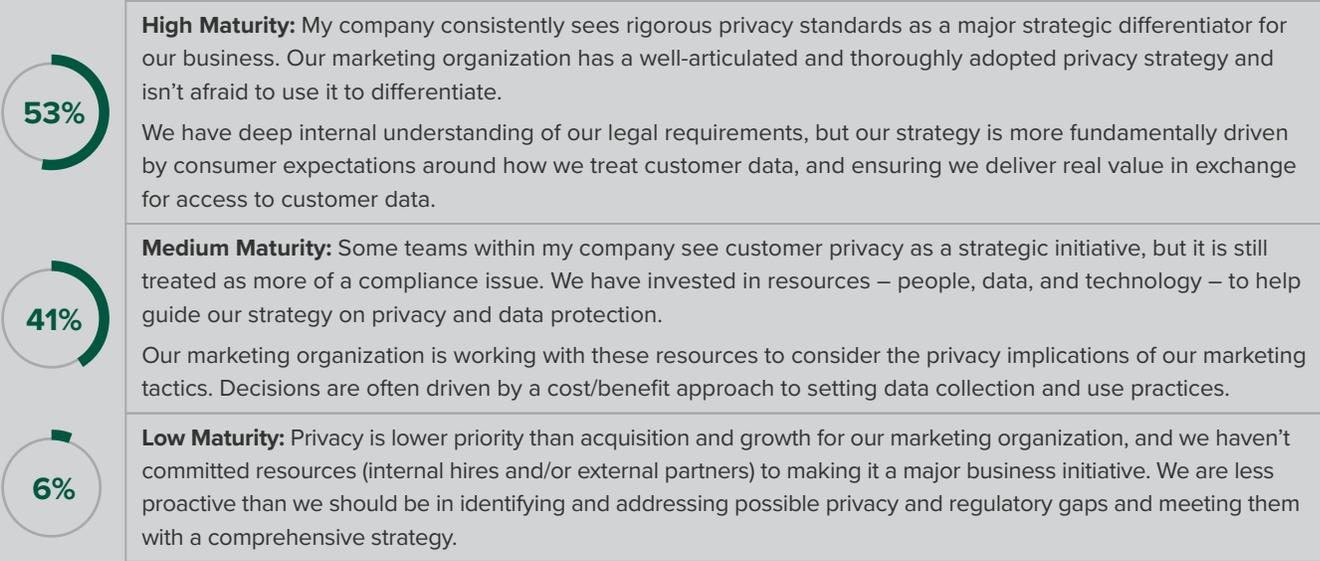
MORE THAN HALF OF BRANDS STATE THEY HAVE HIGHLY MATURE PRIVACY STRATEGIES

To be a mature privacy organization, brands must internalize a rigorous set of privacy standards and features, and treat them as important business differentiators. They must also have privacy strategies within the marketing organization that are well-articulated and thoroughly adopted. These brands' privacy strategies will need to be driven by the perception of how customers expect their data to be treated; with a keen understanding of the necessary legal requirements to match. Finally, these brands access and use data in exchange for delivering genuine customer value. In this study, 53% of brands stated they have highly mature privacy practices today (see Figure 5).

Of course, this may not be the whole story. These organizations may not be what we consider truly mature — that is, functioning with a privacy-by-design, outside-in, customer-led approach to privacy. Rather, they may be functioning at a level of parity with the majority of their peers, who are often still compliance-led and with little to no consideration for the design of customer or privacy experiences.

Figure 5

“Which of the following best describes your organization’s current customer privacy management practices?”



Base: 471 marketing, data analytics, and legal privacy leaders at US B2C enterprises
Source: A commissioned study conducted by Forrester Consulting on behalf of Neustar, October 2020

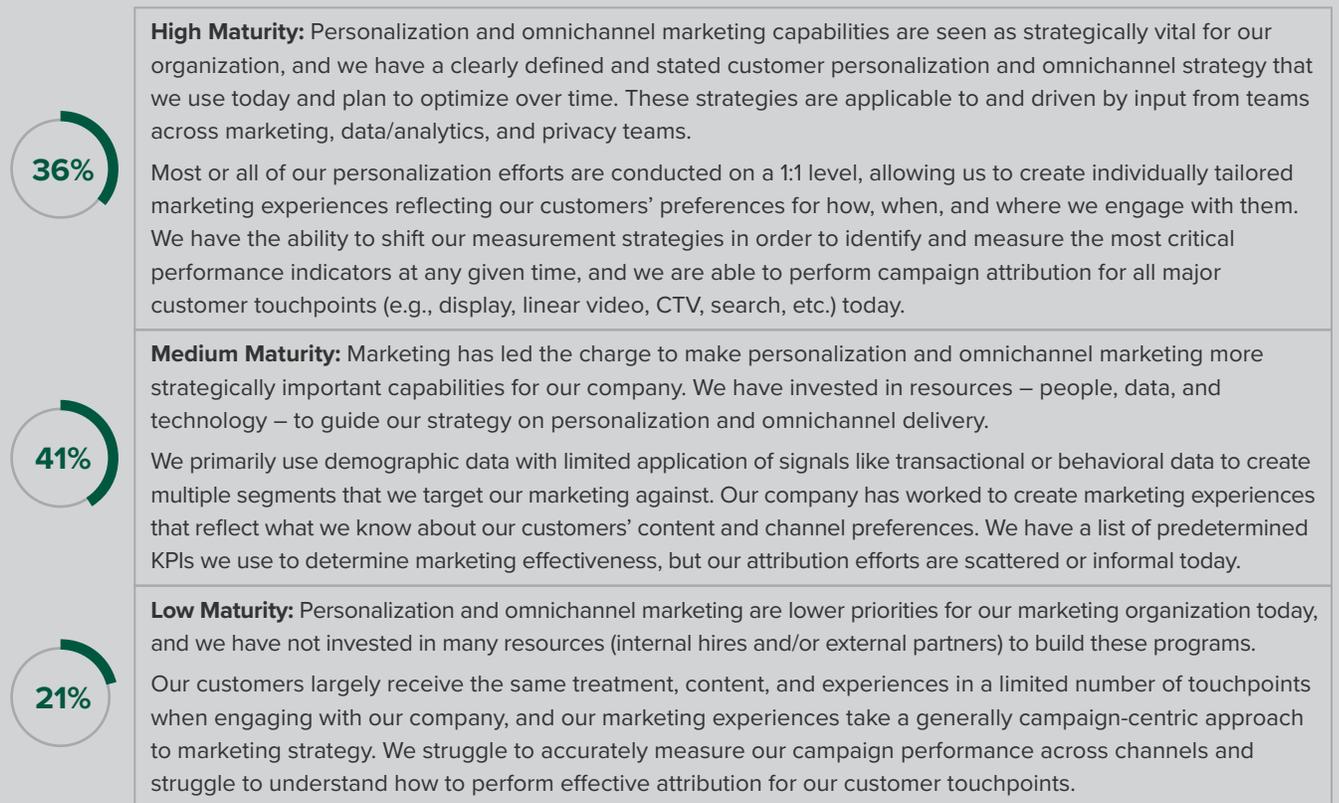
BRANDS ARE FAR LESS LIKELY TO CLAIM MATURE PERSONALIZATION AND OMNICHANNEL MARKETING PRACTICES

To claim highly mature personalization and omnichannel marketing practices, a brand must first recognize that these capabilities are strategically vital to their success. Their strategies governing personalization and omnichannel marketing should reflect the input of stakeholders from privacy, analytics, and marketing teams, and it should be clearly defined, stated, and dynamic, i.e., to be changed and optimized over time.

These strategies power brands to conduct personalization efforts at a 1:1 level, resulting in individually tailored marketing experiences that are rooted in direct customer input for how, when, and where they engage. These programs are evaluated through measurement strategies that can be shifted to focus on the most relevant KPIs needed in the moment, across touchpoints. Today, just 36% of respondents claim mature personalization and omnichannel marketing capabilities (see Figure 6).

Figure 6

“Which of the following best describes your organization’s current approach to personalization and omnichannel marketing?”



Base: 471 marketing, data analytics, and legal privacy leaders at US B2C enterprises

Source: A commissioned study conducted by Forrester Consulting on behalf of Neustar, October 2020

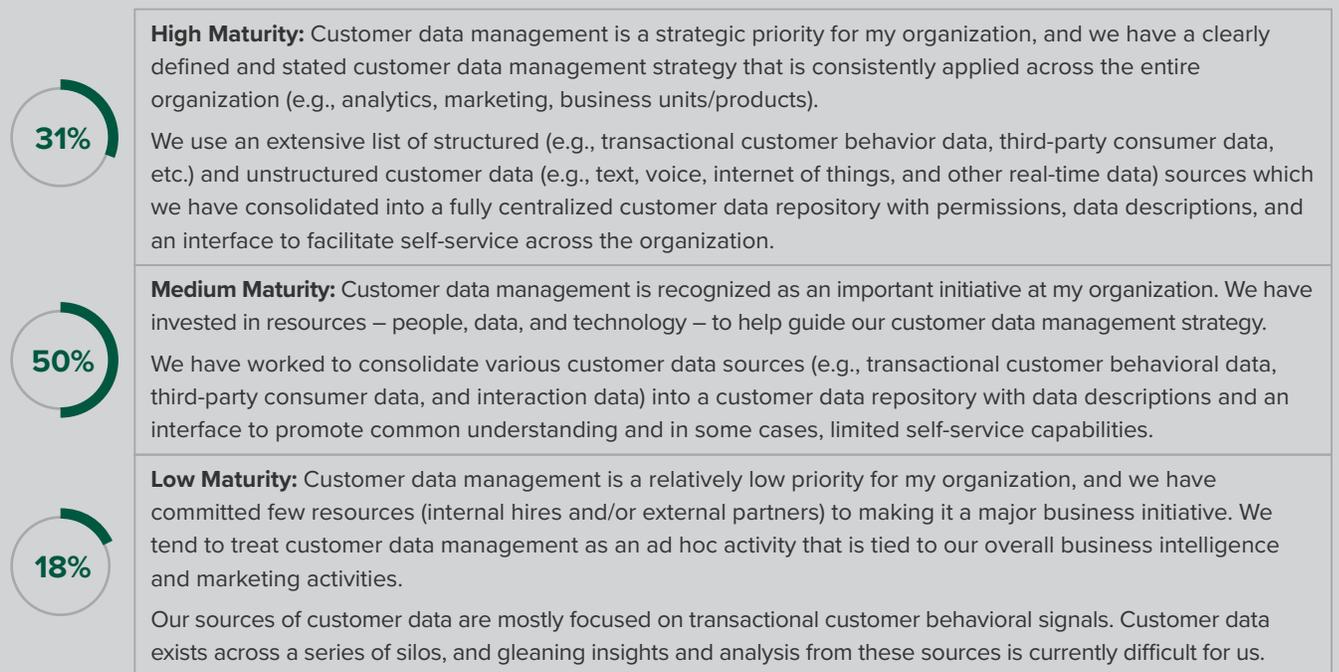
FEWER THAN ONE THIRD SEE DATA GOVERNANCE AS A STRATEGIC PRIORITY

Highly mature organizations recognize that without effective data governance, marketing programs can't accurately understand or act on customer needs, preferences, or moments. They understand data governance is a strategic priority and have worked to ensure their strategies are clearly defined and consistently applied across the marketing organization. These brands can effectively leverage customer identities to connect data together, while layering on best practices in data hygiene, enhancement, verification, and storage. These best practices will ultimately drive improvements in data quality, scale, access, and precision.

The marketing programs of highly mature organizations cover an extensive list of structured and unstructured customer data. This list has been consolidated into a fully centralized customer data repository that helps facilitate managed self-service across the organization with permissions, data descriptions, and an interface that makes access easy and comprehensible. Today, just 31% of respondents align their data governance practices to this description (see Figure 7).

Figure 7

“Which of the following best describes your organization’s current approach to data management?”



Base: 471 marketing, data analytics, and legal privacy leaders at US B2C enterprises

Source: A commissioned study conducted by Forrester Consulting on behalf of Neustar, October 2020

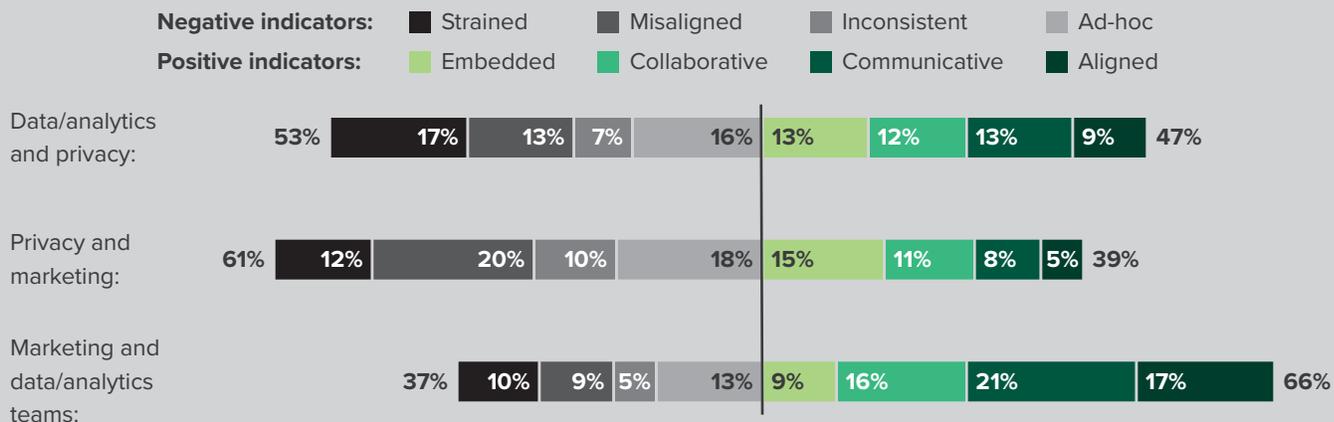
BRANDS STRUGGLE TO PUT IT ALL TOGETHER IN THE FACE OF MISALIGNED TEAM STRUCTURES

Modern practices require that brands proverbially chew gum and walk at the same time, but a major issue at play is an apparent lack of alignment between privacy, analytics, and marketing teams and strategies. For example, just 23% of respondents said they were capable of executing strategies that fully accounted for both data governance and customer privacy management at the same time, and that was the best-case scenario. Just 17% of brands were able to simultaneously deliver personalized, omnichannel marketing programs along with customer privacy strategies — the same number that are capable of executing both data governance and personalized, omnichannel marketing strategies at the same time.

The privacy, analytics, and marketing leaders in this study described the working relationship between their respective teams using either negative terms like “strained” or “misaligned” or positive terms such as “communicative” and “collaborative.” We found that the marketing and analytics teams feel relatively well-aligned with one another; however, they run into conflict with their privacy organizations. Nearly two thirds of respondents cited positive associations between marketing and analytics, including 21% who described their relationship as communicative. And just 47% described the relationship between analytics and privacy teams using positive terms, while only 39% chose positive associations between privacy and marketing teams (see Figure 8).

Figure 8

“Which of the following terms best describes the working relationships within your company between marketing, data/analytics, and privacy teams?”



Privacy teams tend to be viewed by the marketing organization as a barrier to achieving marketing and analytics goals.

Base: 471 marketing, data analytics, and legal privacy leaders at US B2C enterprises
 Source: A commissioned study conducted by Forrester Consulting on behalf of Neustar, October 2020

This isn't reflecting a healthy role for privacy within the organization, and it reinforces the tendency for marketing and analytics to see privacy as a separate requirement or step — or, worse, a hindrance to their real work and objectives. To date, brands were able to make incremental progress in their programs' sophistication with this approach, but they are quickly hitting diminishing returns. Rather, modern customer data and marketing strategies must operate across all three critical pillars, and most brands indicate they are struggling with this today and are facing backlash and ineffective programs as a result.

Brands Can't Afford To Ignore The Coming Data Deprecation Wave

Brands still have to optimize their customer identity strategies in order to be ready for future shifts in B2C marketing, and they know that failing to pivot their strategies quickly will lead to significant business pain. Brands were asked to report on what repercussions they thought would arise from failing to address these shifts, and their top responses indicate they are wary of upset customers, lost sales, regulatory penalties, and less effective marketing programs:

- › **Regulatory or compliance requirements raise the risk of lawsuits, regulatory penalties, and lost sales.** Over the past few years, legislators have taken a stronger stance on consumer data protection. Europe's GDPR, Brazil's LGPD, and California's CCPA have created more scrutiny of data practices and greater repercussions if they fail to adapt.⁴ Thirty-seven percent of respondents said that failing to keep up with regulatory/compliance requirements would likely expose them to consumer lawsuits, while 32% believed it would result in regulatory penalties. Thirty percent claimed they would be likely to lose sales as a result.
- › **Shifts in the types of available consumer data exposes brands to lost sales and disaffected customers.** Device and browser developers have increasingly focused on providing consumers the opportunity to opt out of traditional tracking methods, while walled gardens continue to tightly control advertisers' ability to glean insights on their platforms. Brands were most likely to predict that failing to adapt would lead to lost sales (40%), and 32% of respondents said they would risk upsetting or losing customers by operating on outdated or incomplete customer insights. Similarly, 30% predicted their customer experience would suffer as a result.
- › **Changing volume of customer data could hamper brands' competitive advantage, media effectiveness, and measurement ability.** Privacy shifts and walled gardens also threaten to limit the volume of signals that brands can deploy to power their marketing experiences. Failing to adapt to the possibility of fewer available customer signals could potentially undercut both brands' ability to act on their insights and their competitive advantage as a result, concerns cited by nearly four out of ten respondents in this study. Approximately one-third of brands also indicated that changing data volumes would lead to less effective media campaigns (34%) and loss of measurement fidelity (33%).



Failing to account for oncoming shifts in B2C marketing exposes brands to waste, legal and regulatory risks, disaffected customers, lower measurement fidelity, and lost revenue opportunities.

- › **Phasing out third-party cookies threatens media effectiveness, customer experiences, and sales opportunities.** Third-party cookies are under major threat as nearly every major browser is now planning to or actively blocks third-party cookies by default, and major industry players have their sights firmly set on a post-cookie marketing landscape. Brands that aren't able to adjust their strategies in kind risk having the bottom fall out of their media and marketing campaigns (42%), delivering a less optimized customer experience (36%), and missing out on sales opportunities (33%).
- › **As other identifiers hit the cutting room floor, brands risk turning off customers, poorer measurement capabilities, and less effective marketing campaigns.** Brands rely on multiple identifiers for their programs — from IP addresses to device IDs to various proprietary marketing IDs. And as standards fall in and out of favor or use, it presents a challenge for brands looking to build campaigns and strategies around them. Failing to keep up in this space risks upsetting and losing customers as campaigns become less effective (38%), lowered measurement fidelity (37%), and less effective media (34%).
- › **Inability to gain consensus around data strategy hurts the bottom line and threatens regulatory repercussions.** As long as privacy, data management, and marketing teams continue to address topics like data ownership, data governance, and acceptable use in silos, they won't be able to tackle any of the operational issues we've covered. A consistent, cohesive alignment on data strategy will result in a loss of competitive advantage (43%), the potential of regulatory penalties (37%) and lost sales opportunities (35%).

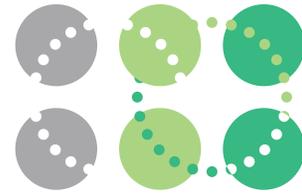
Implement Identity-Based Strategies And Solutions

Brands do themselves and their customers a disservice with strategies that treat privacy management, data governance, and marketing management as three separate pillars. A majority now find themselves facing fractured strategies, workflows, and teams that will struggle to operate effectively in a cookieless, disrupted customer data environment. The future of identity data and marketing will require privacy, analytics, and marketing teams to work in lockstep. They aren't just symbolically linked; they are intrinsically part of what strategies must look like in the future.

Identity resolution practices in this way serve as the glue that holds these three disciplines together, letting brands ensure they are collecting the right data the right way, working with the right providers, and operating with contextual insights across channels and touchpoints with customer preferences baked in. Identity resolution also helps create a clear definition of customer data to aid in compliance, governance, and data ethics. But as brands seek strategies that will deliver compliant, ethical, and personalized omnichannel marketing, they'll require tools which can help these pillars operate from a common view of the truth. To date, many organizations have approached identity resolution as an isolated capability or add-on, rather than as a comprehensive enterprise strategy to support privacy management, data governance, and marketing applications.

Brands can improve customer data governance by connecting the full range of contextual, behavioral, and enterprise data sources without relying on cookies. Identity resolution also powers personalization by allowing brands to link systems of insight and engagement to apply data and insights for the purpose of creating more personalized interactions. This helps brands gain insights and efficiencies through measurement.⁵

This ability to leverage identity resolution across functions can also power a brand's ability to take more direct control over their data strategies, which 75% of respondents highlighted as a priority for dealing with impending changes in B2C marketing. Similarly, 70% plan to increase investment in their in-house data analytics teams and capabilities. Identity resolution encourages data portability and ownership by creating a centralized and protected data resource that can be used across a brand's organization. It provides the sustainable and enriched connections that marketers, analysts, and data scientists can rely on to maximize their data-driven strategies. These are encouraging developments, in that the more visibility and control brands have over how they and their partners collect, manage, and utilize identity data, the better they can ensure their pursuit of compliant, enduring strategies.



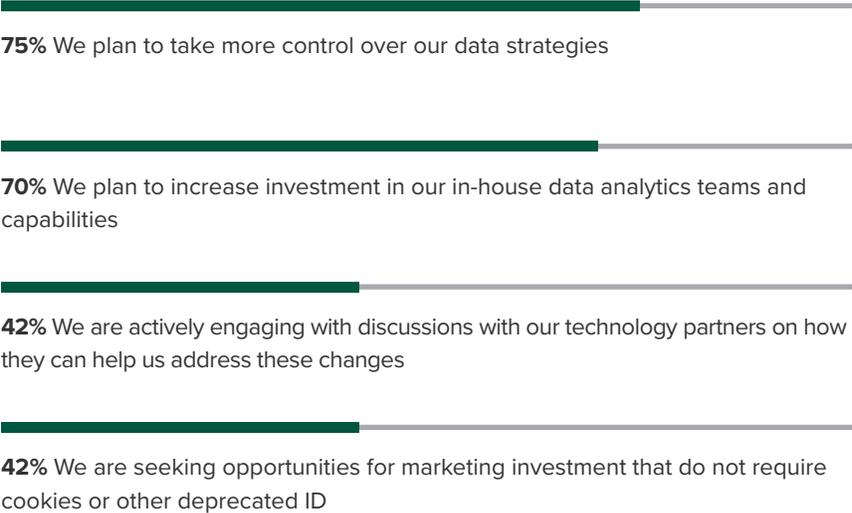
Identity resolution refers to the process of integrating identifiers across available touchpoints and devices with behavior, transaction, and contextual information into a cohesive and addressable consumer profile for marketing analysis, orchestration, and delivery.

Brands know that their marketing programs are due for disruption as more restrictive privacy regulations, browser and device protections, and walled-garden ecosystems threaten their delivery of relevant, valuable, and ethical customer experiences. However, just 42% say they are seeking opportunities to invest in marketing strategies that don't rely on cookies today, which is the same number who say they are engaging with their technology partners on how they can help address changes to customer data and marketing (see Figure 9).

Gaining greater insight and control over their use of customer data and aligning to new standards for audience identification and operationalization is critical to promoting a seamless transition to a post-cookie future. With the right infrastructure, data, and processes in place, privacy, analytics, and marketing teams can finally align to create a winnable strategy for the future.

Figure 9

“Which of the following steps is your company taking today to respond to changes in the B2C marketing landscape?”



Brands are looking to take more internal control of their data strategies and analytics capabilities, but they haven't embraced the ramifications of those plans in a post-cookie world.

Base: 471 marketing, data analytics, and legal privacy leaders at US B2C enterprises
Source: A commissioned study conducted by Forrester Consulting on behalf of Neustar, October 2020

Key Recommendations

Forrester's in-depth survey of privacy, analytics, and marketing decision-makers about the future of B2C marketing yielded several important recommendations:



Audit the impact of data deprecation across multiple dimensions. All companies will be impacted by data and privacy changes, but the breadth and depth of those effects will vary by industry, geography, and company. Conduct an evaluation to identify how data deprecation will impact all aspects of the business such as data collection, gathering consumer consent and zero-party data, personalization, campaign targeting, and customer interactions. With a firm understanding of the impact of data deprecation, companies can target appropriate policy, process, and technology changes to assure continuity, compliance, and effectiveness.



Develop privacy management, analytics, and marketing in lockstep. Privacy management, analytics, and marketing will all be areas of ongoing development and investment for most companies, but the three are tightly related and dependent on one another. Underdeveloped capabilities will hold the others back, so it's more effective to incrementally develop all three phases together to ensure coordination and integration.



Rethink partner selection criteria. As the macro-environment changes, firms must consider whether or not they are working with the right partners to serve their needs. Choosing an identity resolution partner requires a focus on the right criteria, assets, and use cases that drive a company's programs. It's also crucial to assess partners' roadmaps and plans to maintain compliance and capabilities not only in the short term, but also over the long term as the landscape changes and new rules and market factors go into effect.

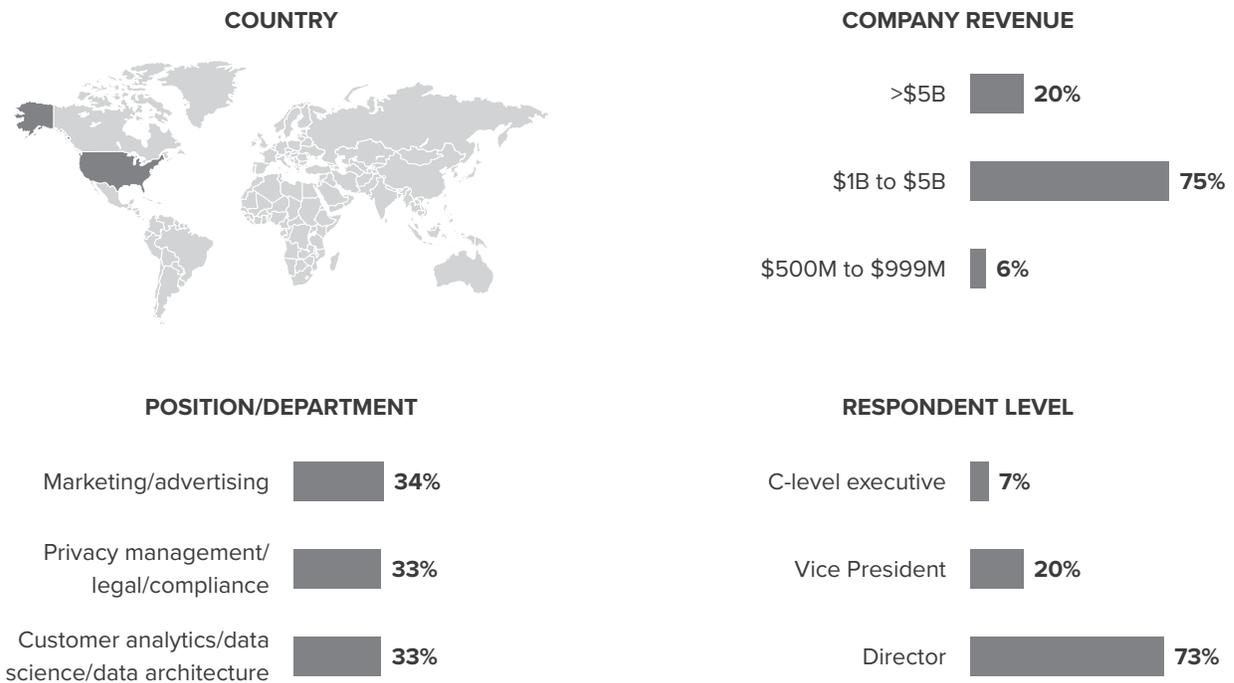


Take an outside-in approach to privacy. Consider this: For many consumers, their very first interaction on your digital properties comes with an obtrusive and unbranded cookie banner or other consent mechanism. It's at best annoying, and at worst intrusive; either way, most consumers end up agreeing to something they don't understand or abandoning your site entirely. It's time to treat privacy experiences as a way to build trust and create engagement. Take the time to design your consent mechanisms and privacy pages to have an outside-in approach, i.e., simple and transparent language, strong branding, and treat that approach as an important part of your customer journey.

Appendix A: Methodology

In this study, Forrester conducted an online survey with 471 respondents with privacy, marketing, and analytics teams at US enterprise organizations to evaluate their preparedness for significant shifts in customer data and B2C marketing. Survey participants included decision-makers in privacy, analytics, and marketing teams. Questions provided to the participants asked about their awareness of future shifts in B2C marketing, as well as their preparedness and maturity to address these shifts. Respondents were offered a nominal incentive as a thank you for time spent on the survey. The study began in June 2020 and was completed in February 2021.

Appendix B: Demographics



Base: 471 marketing, data analytics, and legal privacy leaders at US B2C enterprises
Source: A commissioned study conducted by Forrester Consulting on behalf of Neustar, October 2020

Appendix C: Endnotes

¹ Source: Tina Moffett, “Marketers, You Might Hate Abiding By New Data Restrictions, But Doing Nothing Isn’t An Option,” Forrester Blogs (<https://go.forrester.com/blogs/marketers-you-might-hate-abiding-by-new-data-restrictions-but-doing-nothing-isnt-an-option/>).

² Source: Ibid.

³ CCPA: California Consumer Privacy Act; CPRA: California Public Records Act.

⁴ GDPR: General Data Protection Regulation; LGPD: General Personal Data And Protection Law.

⁵ Source: “Now Tech: Identity Resolution, Q3 2020,” Forrester Research, Inc., September 24, 2020.