

Issue 7 / May 2023

GDPR: Five years on

A survey of the impact of GDPR and its effect on organisations in Ireland





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About the Research

Behaviour & Attitudes (B&A) carried out a quantitative online survey of senior figures with responsibility for the compliance and data protection functions in larger Irish businesses during February and March 2023. The sample comprised a cross section of businesses by size (measured by number of employees) and business sector and industry. Total sample size: N=156. Fieldwork dates: 28 February to 16 March 2023.

In addition, B&A conducted research of a nationally representative sample of 1,000 adults aged 16+. The questions were included on the B&A face-to-face barometer. Fieldwork dates: 15 to 27 March 2023.

We are very grateful to all the survey participants for their valuable time and insights.

^{*} In the section 'Attitudes Towards GDPR', the years indicated reflect the timing of our fieldwork. In 2023, fieldwork and report publication happened in the same year hence the gap for 2022.



Executive Summary

The GDPR Five Years On – Reform and Education Can Strengthen The GDPR's Success

A five-year anniversary represents a natural point of reflection on any major innovation; a juncture at which successes and areas for improvement over the medium term can begin to be judged. Mazars and McCann FitzGerald have followed the development and implementation of the GDPR closely over the past decade, in particular examining perceptions of the Regulation through the firms' annual GDPR survey.

The emergent themes from this research have consistently proved extremely interesting, as those affected most profoundly by the GDPR's introduction have sought to adjust successfully to the exigencies of regulatory compliance in the field of data protection.

This year, for the first time, we have asked organisations to judge the full five-year impact of the GDPR, as well as seeking the perceptions of the general public on this new regulatory framework.

The results make for fascinating reading.

A majority of Irish organisations (54%) believe the GDPR is in need of reform. In particular, 75% agreed that complainants should be required to attempt to resolve complaints with the organisation processing their data before initiating a complaint to the Data Protection Commission (75%), while 52% believe data subjects should be required to pay a reasonable fee for making a data subject access request (52%). There is frustration with how the GDPR has been interpreted, with almost half (45%) believing that interpretations adopted by Supervisory Authorities has made compliance more difficult. Organisations have also been surprised by the cost of compliance, with two-thirds stating the costs of GDPR compliance are greater than those envisaged when the Regulation was commenced in 2018.

Despite this appetite for reform, there is general belief in organisations that the GDPR has operated as a largely positive force. There is stronger agreement that the GDPR is beneficial for individuals and for organisations' long-term relations with stakeholders such as employees and customers than in 2018.

There continues to be strong concern about the risks of non-compliance, with two thirds of respondents describing themselves as more concerned about non-compliance now than in 2018 and 58% being concerned about the prospect of being fined for non-compliance. However concerns about civil actions being initiated by data subjects have abated, at least for the time being. Almost half (43%) of all respondents felt that enforcement of the GDPR was largely in line with expectations, with a reasonably even distribution (32% to 25%) contending enforcement was lesser or greater, respectively, than anticipated.

The general public, who form part of this survey for the first time, demonstrated conflicting views about data protection. 80% said are more concerned about their online privacy now as compared to five years ago and 78% agreed that they are likely to purchase from organisations that have a good record in how they handle customers' data. However roughly half of all customers (49%) are willing to forgo some level of data protection if the product or service, outside of the areas of banking or financial services, is very appealing. This calls into question the value that members of the public attribute to the protection of their personal data. In light of recent debate concerning the extent to which organisations should be permitted to process personal data in exchange for the provision of services for free or at a lower cost, this finding in particular will prove interesting reading to those on both sides of the discussion.

Despite all of the attention that has been devoted to transparency measures, responses from members of the public indicate that there is a need to simplify or more clearly communicate messages on data protection and the GDPR. 65% agreed that organisations make it difficult to understand their approach to data protection. Meanwhile, 24% said they had either never heard of the GDPR or knew very little about it. For all those involved in implementing, advising on and enforcing the GDPR, these results indicate that there is still work to be done by all stakeholders in order to ensure that the GDPR is understood and applied as it was intended to be.

Key Contributors



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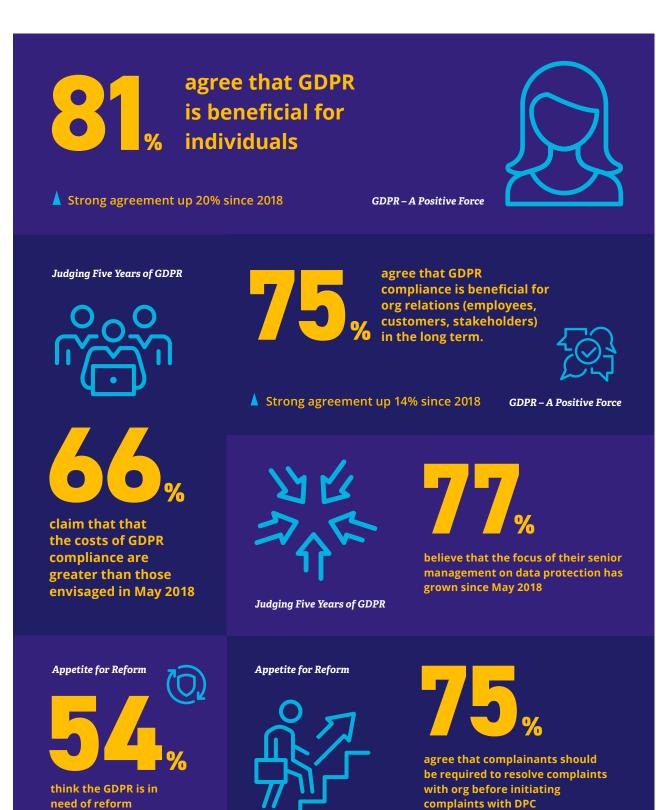


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Overview of the Numbers

Responses from Organisations





Overview of the Numbers

Responses from the General Public



report at least a little knowledge of their rights under GDPR





believe the introduction of the GDPR has led to better protection of their personal data online



are more concerned about their online privacy now as compared to 5 years ago

report they are likely to purchase from organisations that have a good record in how they handle customers' data





agree that organisations make it difficult to understand their approach to data protection

are willing to forgo some level of data protection if the product or service is very appealing*

*Outside of banking or other finance related environments



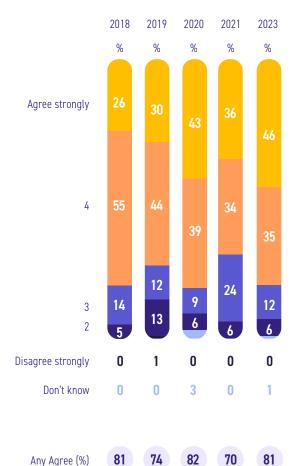


Strong agreement that GDPR is beneficial for individuals has increased substantially since 2018.

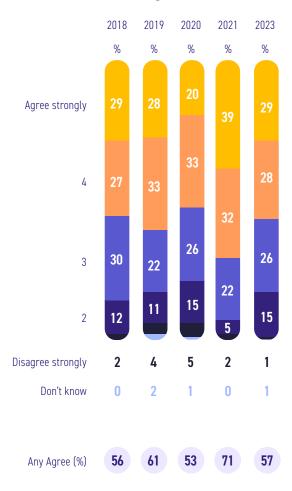
Q: Using a scale of one to five please indicate the extent to which you agree or disagree with each statement



GDPR is beneficial for individuals



GDPR compliance places excessive admin burden on organisations





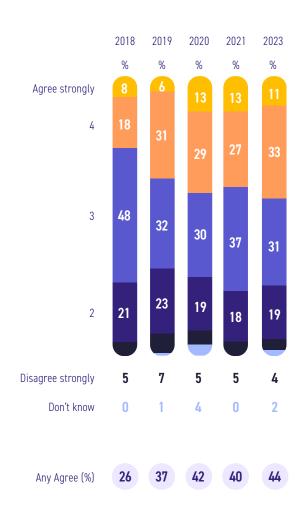
Q: Using a scale of one to five please indicate the extent to which you agree or disagree with each statement



GDPR compliance is beneficial for org relations (employees, customers, stakeholders) in the long term

% % % % % Agree strongly Disagree strongly Don't know

Working to comply with GDPR has delivered many benefits for our org



Base: All respondents - 156

Any Agree (%)



Q: Using a scale of one to five please indicate the extent to which you agree or disagree with each statement



Concerned about prospect of being fined for GDPR non-compliance

ned for GDPR non-compliance compliance and data privacy 2019 2020 2021 2023 2019 2020 2021 2



CEO strongly engaged in GDPR



Concern is abating somewhat about civil actions and risks of non-compliance.

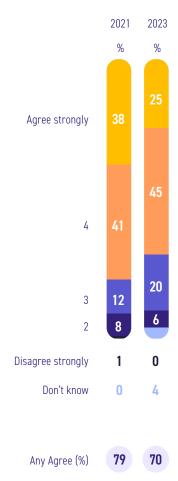
Q: Using a scale of one to five please indicate the extent to which you agree or disagree with each statement



We are concerned about civil actions from data subjects

2021 2023 % % Agree strongly 4 3 25 26 2 25 22 6 Disagree strongly Don't know 45 Any Agree (%) 43

The risks associated with GDPR non-compliance are increasing



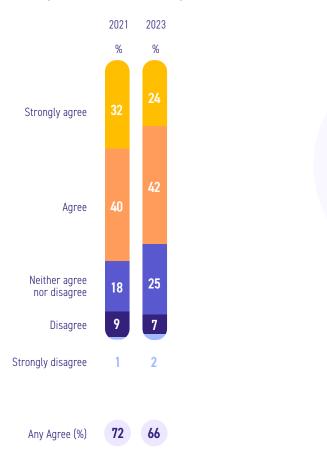


Concern about non-compliance is greater than what it was in 2018.

Q: I am more concerned about GDPR non-compliance than in May 2018



I am more concerned about GDPR non-compliance than in May 2018

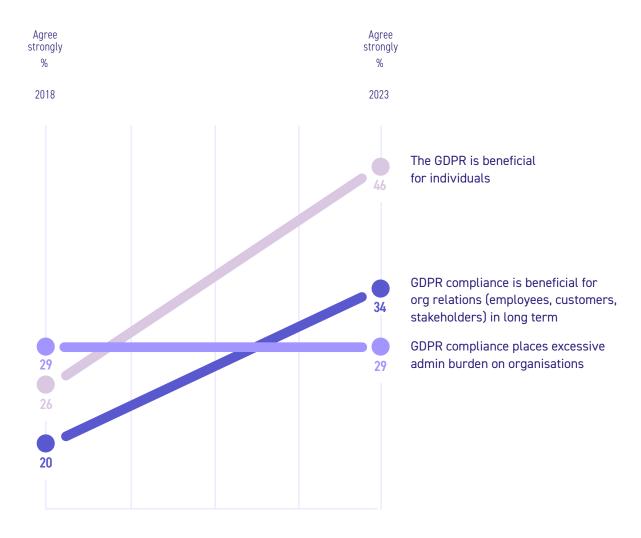


2 in 3
are more concerned about GDPR noncompliance than in May 2018



Over time respondents' belief in the benefits of GDPR have strengthened.

Q: Using a scale of one to five please indicate the extent to which you agree or disagree with each statement



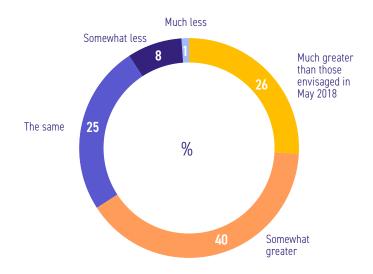




The costs of GDPR compliance are generally considered greater than those envisaged in May 2018.

Q: The costs of GDPR compliance for my organisation today are:







2 in 3claim that that the costs of GDPR compliance are greater than those envisaged in May 2018

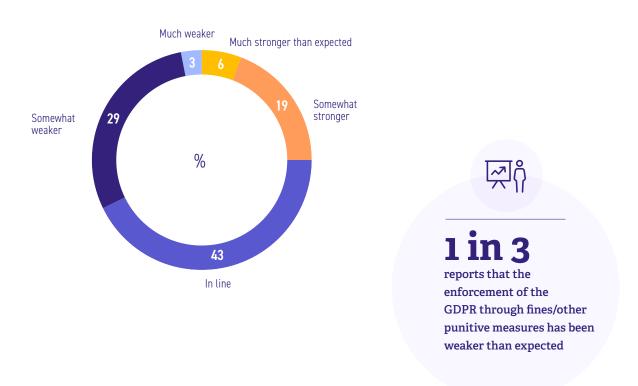
1 in 10 found the costs to be lower than initially expected



The enforcement of GDPR through fines or other punitive measures has been generally in line with expectations or weaker than expected.

Q: Compared to your views in May 2018, the enforcement of the GDPR through fines, or other punitive measures, has been:



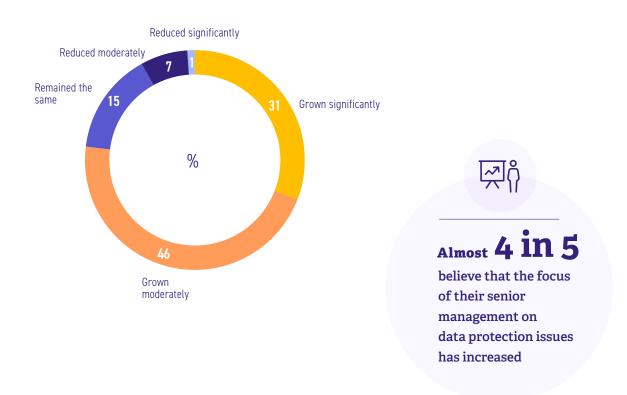




The focus of senior management on data protection issues has grown since May 2018.

Q: Since May 2018, the focus of senior management in my organisation on data protection issues today has:



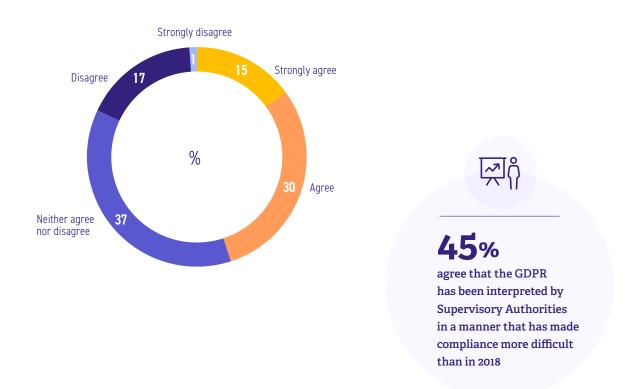




The interpretation of the GDPR by Supervisory Authorities has made compliance more difficult according to 45% of the respondents.

Q: Over the course of the last five years, the GDPR has been interpreted by Supervisory Authorities in a manner that has made compliance more difficult than at the GDPR's outset







Proportion of data breaches reported in comparison to the first year.

- Q: My organisation reports a higher proportion of personal data breaches to the Data Protection Commission today than it did in the first year following the GDPR's commencement
- Q: My organisation reports a higher proportion of personal data breaches to the affected data subjects today than it did in the first year following the GDPR's commencement



My organisation reports a higher proportion of personal data breaches to the Data Protection Commission today as compared to 2018

My organisation reports a higher proportion of personal data breaches to the affected data subjects today as compared to 2018



About 1 in 4
reported a higher
proportion of
data breaches

reported a lower proportion of data breaches





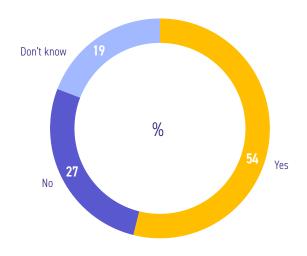
Appetite for Reform

The GDPR in need of reform.

Q: Do you think the GDPR is in need of reform?



Is the GDPR in need of reform?





54% think the GDPR is in need of reform



Strongly agree

Appetite for Reform

Areas for reform are mainly focused on how complaints should be handled.

Q: Using a scale of one to five, please indicate the extent to which you agree or disagree with the following statements.

Neither agree

nor disagree

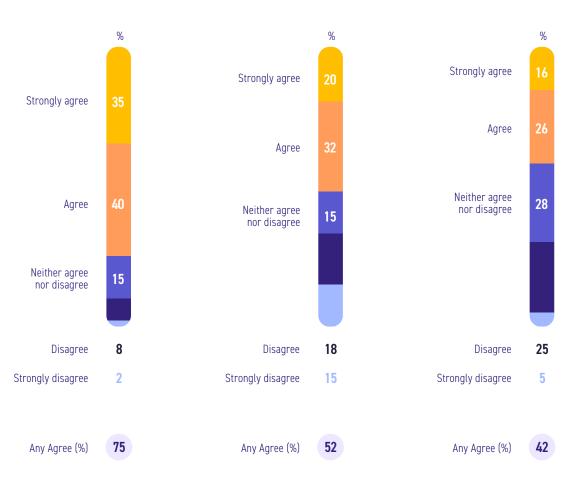
Agree

Complainants should be required to resolve complaints with org before initiating complaints with DPC Data subjects should be required to pay a reasonable fee to make data subject access requests

Disagree

Threshold for reporting data breaches to DPC or other Supervisory Authority too low

Strongly disagree





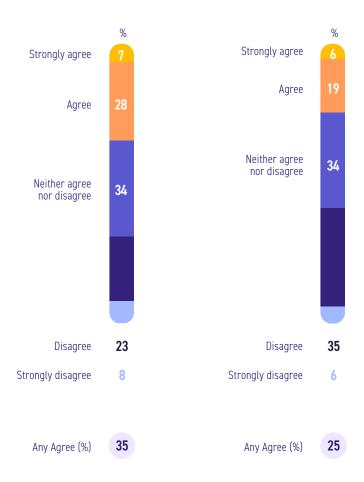
Appetite for Reform

Areas for reform are mainly focused on how complaints should be handled.

(Continued)

Q: Using a scale of one to five, please indicate the extent to which you agree or disagree with the following statements.







Strongest agreement with the idea that complainants should be required to resolve complaints with the organisation before initiating complaints with DPC





Awareness of rights under GDPR.

Q: Which of the following best describes your awareness of your rights under the GDPR (General Data Protection Regulation)?



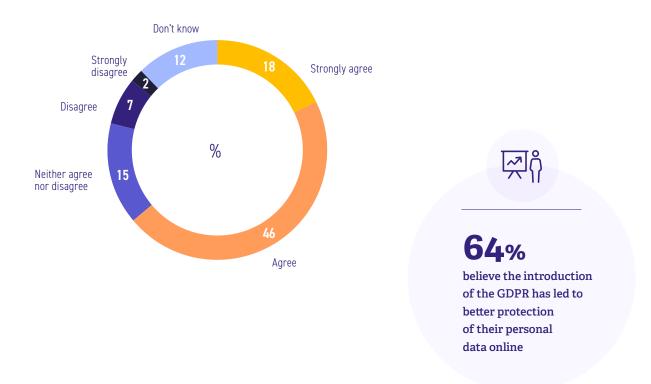




I feel my personal data is better protected online due to the introduction of the GDPR.

Q: Please tell me the extent to which you agree or disagree that: I feel my personal data is better protected online due to the introduction of the $\mbox{\rm GDPR}$



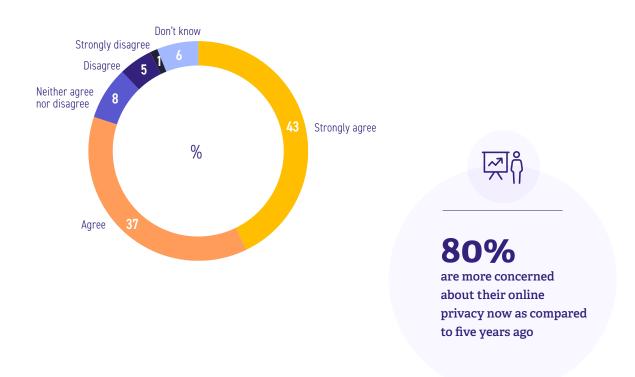




I am more concerned about my online privacy these days as compared to five years ago.

 ${\tt Q:I}$ am going to read out to you a list of statements and I would like you to tell me the extent to which you agree or disagree with each



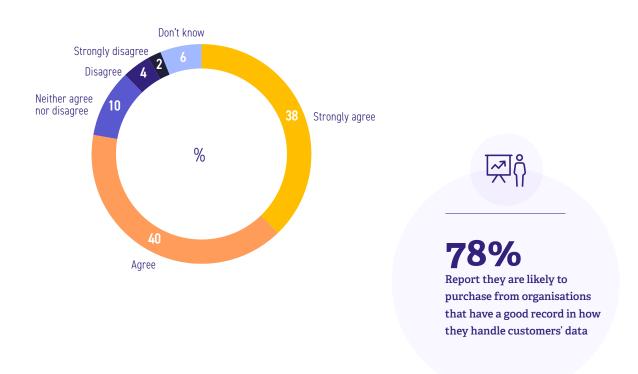




I am likely to purchase goods and services from organisations that have a good record with regard to handling of customer data.

 ${\sf Q}$: I am going to read out to you a list of statements and I would like you to tell me the extent to which you agree or disagree with each



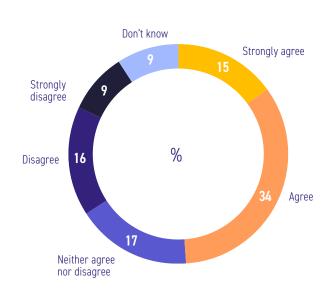




Outside of banking or other finance related environments, I am willing to forgo some level of data protection if the product or service is very appealing.

 ${\sf Q}$: I am going to read out to you a list of statements and I would like you to tell me the extent to which you agree or disagree with each







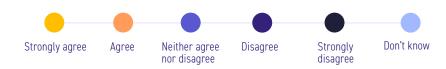
49% are willing to forgo some level of data protection if the product or service is very appealing

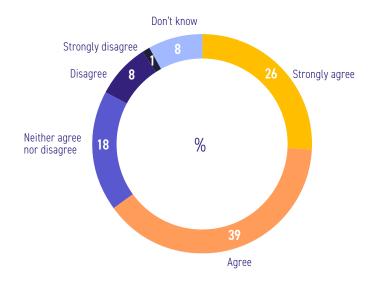
Only **25%** are not willing to do this



I find organisations make it difficult for you to understand their approach to data protection.

 ${\tt Q}$: I am going to read out to you a list of statements and I would like you to tell me the extent to which you agree or disagree with each





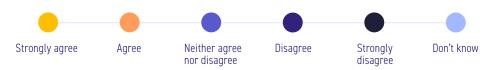


agree that organisations make it difficult to understand their approach to data protection



Dubliners more concerned about online privacy and more likely to purchase from organisations with a good record on this matter.

 ${\sf Q}$: I am going to read out to you a list of statements and I would like you to tell me the extent to which you agree or disagree with each



I am more concerned about my online privacy these days as compared to 5 years ago I am likely to purchase goods and service from organisations that have a good record with regard to handling of customer data

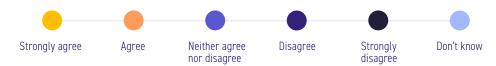




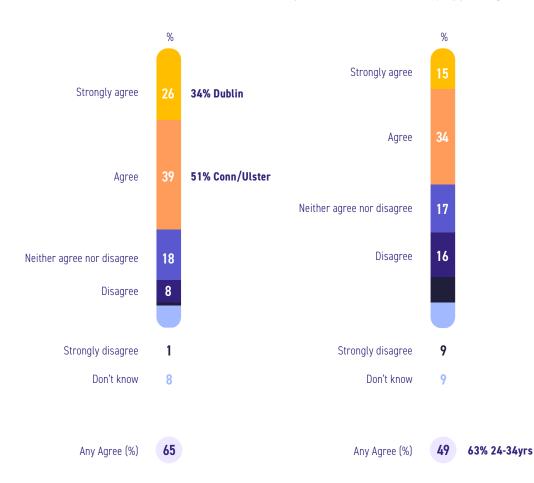
Dubliners more concerned about online privacy and more likely to purchase from organisations with a good record on this matter.

(Continued)

 ${\sf Q}$: I am going to read out to you a list of statements and I would like you to tell me the extent to which you agree or disagree with each



I find organisations make it difficult for you to understand their approach to data protection Outside of banking or other finance related environments, I am willing to forgo some level of data protection if the product or service is very appealing





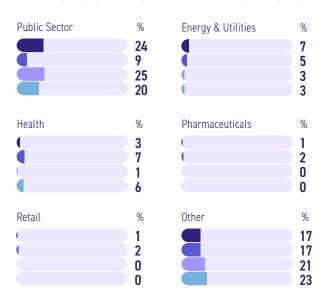


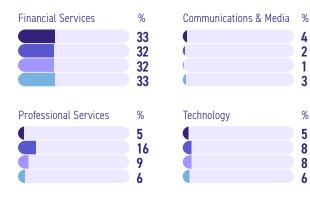
Profile of Respondents



Industry

Q: For analysis purposes, can you indicate the industry sector you operate in?





2

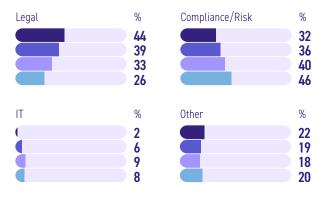
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8

Function of the Respondent

Q: Which of the following best describes your function in the organisation?





Profile of Respondents



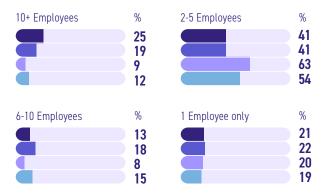
Number of Employees (Ireland)

Q: How many people are employed in your organisation in Ireland?



Number of Employees directly involved in GDPR compliance work

Q: How many people in your organisation are directly involved in GDPR compliance work on an ongoing basis?



Number of Employees (Worldwide)*

Q: How many people are employed in your organisation worldwide?





Dubliners and white-collar significantly more likely to report knowledge about their rights.

Q: Which of the following best describes your awareness of your rights under the GDPR (General Data Protection Regulation)?



		Total	Yes I am aware of it and know a lot about it	Yes I am aware and know a little about it	Yes I think I heard of it before but I know very little about it	I have never heard of it	Any Yes
		1000	25	51	15	9	91
Gender	Female	484	26	48	16	10	90
	Male	516	24	53	14	9	91
Age	16-24	108	24	53	11	12	88
	25-34	149	25	54	11	10	90
	35-49	298	31	47	14	8	92
	50-64	243	25	55	16	4 ▼	96
	65+	202	17 ▼	46	24	13	87
Social Class	ABC1	537	32	54	8 1	6 ▼	94
Class	C2DE	425	20 🔻	49	19	12	88
	F	38	19	34 ▼	41 🛕	6	94
Region	Dublin	250	37 🛕	47	8 7	8	92
	Leinster	316	21	58	16	5 ▼	95
	Munster	264	27	53	11 7	9	91
	Conn/Ulster	170	10 🔻	41 V	32	17	83 V
Area	Urban	678	28	52	11 7	9	91
	Rural	322	20 🔻	47	24	9	91



Those from Munster are more likely to feel that the GDPR regulations improved the protection of their online personal data.

Q: Please tell me the extent to which you agree or disagree that: I feel my personal data is better protected online due to the introduction of the GDPR regulations

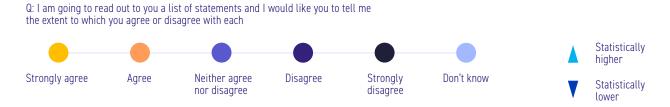


I feel my personal data is better protected online due to the introduction of the GDPR regulations

		Total	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know	Any Agree (%)
		1000	18	46	15	7	2	12	64
Gender	Female	484	18	47	15	7	2	11	65
	Male	516	19	44	15	7	2	13	63
Age	16-24	108	21	50	9 🔻	7	0 🔻	13	71
	25-34	149	14	54	16	7	2	7 ▼	68
	35-49	298	22	43	14	7	3	11	65
	50-64	243	16	45	16	11	2	10	61
	65+	202	17	39	20	1	2	21 🛦	56
Social Class	ABC1	537	22	47	13	8	1	9 ▼	69
Class	C2DE	425	15	43	18	6	4	14	58
	F	38	13	54	10	3	0 🔻	20	67
Region	Dublin	250	21	42	19	6	3	9	63
	Leinster	316	16	44	15	11	4	10	60
	Munster	264	26	45	12	4	1 🔻	12	71
	Conn/Ulster	170	7 ▼	54	13	5	1	20 🛦	61
Area	Urban	678	16	46	16	7	3	12	62
	Rural	322	23	45	13	6	1	12	68



Dubliners and white collar more concerned about their online privacy these days as compared to 5 years ago.



I am more concerned about my online privacy these days as compared to 5 years ago

		Total	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know	Any Agree (%)
		1000	43	37	8	5	1	6	80
Gender	Female	484	41	37	9	5	3	5	78
	Male	516	45	37	7	4	1	6	82
Age	16-24	108	34	42	12	6	0	6	76
	25-34	149	47	33	11	7	1	1 ▼	80
	35-49	298	47	39	6	3	2	3 ▼	86
	50-64	243	47	35	6	4	1	7	82
	65+	202	34 ▼	37	7	6	4	12	71 ▼
Social Class	ABC1	537	45	39	8	3	1	4	84
Class	C2DE	425	41	37	8	6	1	7	78
	F	38	42	28	9	8	5	8	70
Region	Dublin	250	52 ▲	30	7	4	2	5	82
	Leinster	316	44	32	11	5	2	6	76
	Munster	264	41	43	6	4	0	6	84
	Conn/Ulster	170	29 🔻	49	7	7	3	5	78
Area	Urban	678	44	36	8	4	1	7	80
	Rural	322	42	41	7	5	2	3 ▼	83



Dubliners and white collar more likely to purchase from organisations that have a good record with regard to handling customer data.



Neither

I am likely to purchase goods and service from organisations that have a good record with regard to handling of customer data

		Total	Strongly agree	Agree	agree nor disagree	Disagree	Strongly disagree	Don't know	Any Agree (%)
		1000	38	40	10	4	2	6	78
Gender	Female	484	35	43	10	4	3	5	78
	Male	516	41	38	9	3	2	7	79
Age	16-24	108	44	40	9	1	0	6	84
	25-34	149	43	41	10	2	2	2	84
	35-49	298	41	41	9	3	3	3 ▼	82
	50-64	243	36	42	10	4	1	7	78
	65+	202	26 ▼	37	12	8	5	12	63
Social Class	ABC1	537	43	42	8	2	1	4	85
Class	C2DE	425	34	38	12	6	2	8	72 V
	F	38	24	45	13	5	7	6	69
Region	Dublin	250	46	34	12	1	2	5	80
	Leinster	316	34	37	14	4	3	8	71 ▼
	Munster	264	39	42	8	4	2	5	81
	Conn/Ulster	170	28 ▼	53	5	8	2	4	81
Area	Urban	678	40	37	11	3	2	7	77
	Rural	322	35	46	8	5	2	4	81



Respondents aged 25-34 more open at the idea of lowering their data protection for an interesting service.



Outside of banking or other finance related environments, I am willing to forgo some level of data protection if the product or service is very appealing

		Total	Strongly agree	Agree	agree nor disagree	Disagree	Strongly disagree	Don't know	Any Agree (%)
		1000	15	34	17	16	9	9	49
Gender	Female	484	15	33	18	18	8	8	48
	Male	516	16	34	16	15	10	9	50
Age	16-24	108	19	31	21	16	6	7	50
	25-34	149	18	45	17	12	3 ▼	5	63
	35-49	298	15	36	14	19	10	6	51
	50-64	243	15	31	15	17	11	11	46
	65+	202	12	25	V 21	15	13	14	37
Social Class	ABC1	537	19	34	15	17	10	5 ▼	53
Olass	C2DE	425	13	34	19	15	9	10	47
	F	38	13	30	20	16	6	15	43
Region	Dublin	250	19	35	16	10 7	13	7	54
	Leinster	316	12	24	▼ 26 ▲	20	9	9	36 ▼
	Munster	264	20	34	13	18	6 T	9	54
	Conn/Ulster	170	8	45	13	19	6	9	53
Area	Urban	678	15	35	16	14	11	9	50
	Rural	322	16	32	19	21	5 ▼	7	48



Dubliners also more critical on how organisations explain their approach to data protection.

 ${\tt Q:I}$ am going to read out to you a list of statements and I would like you to tell me the extent to which you agree or disagree with each



I find organisations make it difficult for you to understand their approach to data protection

		Total	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know	Any Agree (%)
		1000	26	39	18	8	1	8	65
Gender	Female	484	24	38	20	8	2	8	62
	Male	516	28	39	15	8	1	9	67
Age	16-24	108	22	42	21	6	0 🔻	9	64
	25-34	149	31	35	17	13	1	3 ▼	66
	35-49	298	28	40	17	8	3	4	68
	50-64	243	27	40	17	7	1	8	67
	65+	202	21	36	17	8	1	17 👗	57
Social Class	ABC1	537	28	39	15	9	2	7	67
Class	C2DE	425	26	38	20	6	1	9	64
	F	38	16	41	15	16	0	12	57
Region	Dublin	250	34	34	18	4	3	7	68
	Leinster	316	19	35	22	12	1	11	54 V
	Munster	264	30	40	14	8	1	7	70
	Conn/Ulster	170	16	51	15	10	1	7	67
Area	Urban	678	26	38	18	7	2	9	64
	Rural	322	26	40	16	U	1	6	66



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