



# THE STATE

# OF DIGITAL TRUST

IN 2025

Why transparency, consent  
and control are defining marketing's  
next Privacy-Led Era



# Executive summary

**Trust is the internet's most valuable currency, and for marketers, it's fast becoming the ultimate differentiator and growth driver.**

As AI hype accelerates and Big Tech's influence expands, consumers are demanding more than just convenience, they're demanding accountability. In 2025, trust has evolved from a compliance checkbox into a central consumer concern. For marketers, privacy can no longer be an afterthought. It must be embedded into marketing strategy. The brands leading today are those that put privacy at the core of the customer experience.

This shift marks a pivotal moment for marketers. Consumers aren't rejecting data-sharing, they're taking an active role in deciding who gets access to their data and why. Those who adopt a privacy-first mindset won't just meet rising expectations, they'll earn lasting competitive advantage by establishing a close and trusting relationship with consumers.

## The algorithm effect: how AI turned data into a trust issue

People know their data has value and feel uneasy when they're kept in the dark or feel out of control with how it's used. AI hype has made data use even more visible.

**62%** of people feel they have become the product, and **59%** are uncomfortable with their data being used to train AI.

## Consent clicks: privacy choices = marketing moments

Consumers are actively engaging with consent banners. "Accept all" is no longer a reflex, it's a definite decision.

**42%** read cookie banners "always" or "often", while **46%** click "accept all" cookies less often than they did three years ago.

## Not all brands are trusted equally

Consumers don't trust all brands equally, and nearly half say being clear about how their data is used is the single most important factor in earning their trust.

**44%** say transparency about data use is the number one driver for trusting a brand.

## From privacy pressure to brand power

Consumers are signaling that they care about privacy, but they're still unsure how it works.

**77%** of global consumers don't fully understand how their data is being collected and used by brands.





For brands, **Privacy-Led Marketing** is about more than ticking legal checkboxes or meeting regulatory standards. It's a growth imperative, an opportunity to stand out, build deeper loyalty, and grow in a market where trust is the ultimate differentiator.

This report is for marketers ready to turn privacy pressure into marketing advantage and growth. Privacy-Led Marketing is the future of growth, a bold, ethical, and user-first approach that redefines how brands connect, perform, and build trust. The brands that embrace it now won't just meet expectations, they'll shape and drive them.

*"This isn't a backlash, it's a reset. And the brands that succeed will be the ones that don't wait for regulators, but instead lead with Privacy-Led Marketing. Getting ahead in offering transparency, control and informed consent is going to be crucial."*

– Adelina Peltea, CMO at Usercentrics

### About this research

This report is based on a survey by Sapio Research, commissioned by Usercentrics, of 10,000 consumers who frequently use the internet across Europe (the UK, Germany, Italy, Spain, and the Netherlands) and the USA. Interviews were conducted in May 2025. The research aimed to uncover the true state of data privacy and digital trust today, and provide businesses with guidance on how to develop their consumer data consent strategy.





# CHAPTER 1

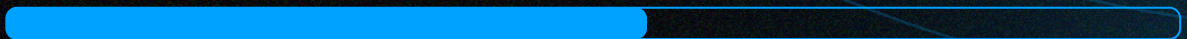
## The algorithm effect: how AI turned data into a trust issue



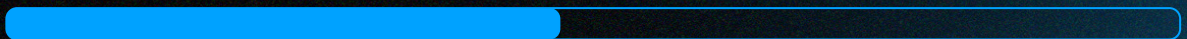
Artificial intelligence is reshaping the relationship between people and their data, and not always for the better. As these systems become more advanced, their opacity deepens concerns about how and why users' data is used.

AI systems are now baked into everyday life: powering recommendations, predicting preferences, automating decisions, and, with that, sometimes even influencing how we perceive reality. But as the presence of AI grows, so too does public discomfort with how these systems are trained and deployed — especially when personal data is involved.

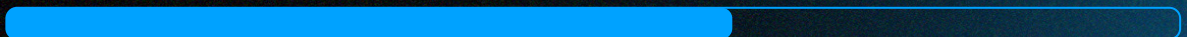
**59%** are uncomfortable with their data being used to train AI models



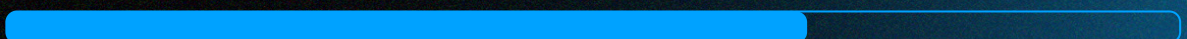
**48%** say they trust AI less than they trust humans with their personal data



**62%** of consumers feel they have become the product



**67%** feel society is overly reliant on certain tech products and services





These aren't just statistics, they're signals. AI is triggering a shift in the public's understanding of privacy, and with it, a demand for new kinds of trust.

The discomfort around personal data being to train AI models is real; and it creates a trust gap that brands must prioritize closing. If ignored, they risk reputational damage and losing user loyalty.

What used to be an abstract concern — “my data is out there” — has become deeply personal. Consumers are starting to ask sharper, more informed questions:

- **What is my data being used for?**
- **Who is profiting from it?**
- **What role does it play in training machines that affect me?**

Consumers no longer want vague promises of “*data protection*.” They want proof that brands know what data they collect, how it's being used, and most importantly — why. When people feel their data is being fed into opaque algorithms that serve corporate goals rather than human needs, trust erodes. This shift raises the bar for brands to not only ask for data, but justify its use in ways that feel fair and transparent.

## We've reached a turning point

In 2025, trust isn't built with fine print. It's built with transparent systems, explainable models, and ethical data practices. People want to see how decisions are made, what they're based on, and how they can opt out if they choose. They're looking for brands that don't just ask for consent, but actually mean it.

This is the foundation of Privacy-Led Marketing, a strategy built not just on privacy compliance, but on clarity. Brands that are willing to engage in the AI and data conversation (rather than avoid it) are positioned to stand apart.



**Tip for Marketers:** AI anxiety is real and growing. Don't ignore it. Instead of hiding behind algorithms, humanize them. Explain how your AI systems work: show people what data is used, and why. Give them real choices. Trust isn't a feature; it's a feeling. And you have to earn it.





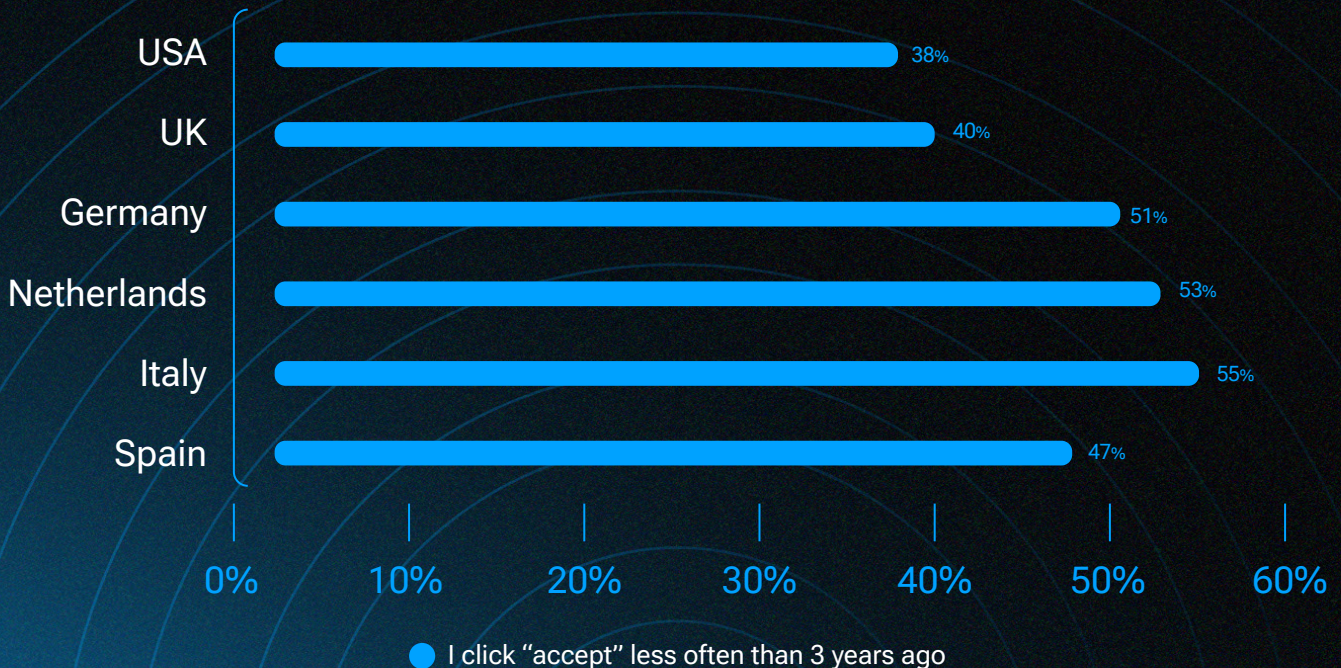
# CHAPTER 2

## Consent clicks: Privacy choices = Marketing moments



Consumers are moving from awareness to action, becoming more intentional in how they manage their data. They're reading cookie banners, rejecting vague terms, and actively adjusting their settings. What was once a passive click is now a conscious choice, and that shift is reshaping how people engage with brands from the very first interaction.

### Opt-in rates are declining



**Consumers are more privacy aware and are acting on it. 42% read cookie banners "always" or "often",** signalling growing consumer intent to participate in their own data governance — a shift that redefines consent as an ongoing dialogue, not a one-time ask.





**While nearly half of consumers (46%)** click “accept all” for use of cookies less often than they did three years ago, according to the survey. This is more pronounced in mainland Europe, with Italy, the Netherlands, and Germany leading the way in this trend. This behavior signals declining blind trust. Brands relying on dark patterns or vague messaging may find engagement falling — not due to apathy, but active resistance.


A further 36% globally have actively adjusted their privacy settings on websites or apps and the same number have stopped using a website or deleted an app due to privacy concerns. The data also reveals that those **who are more privacy-informed are even more likely to modify cookies and take control over their data.**

**Importantly, most consumers (65%) are still happy for brands to collect their data, but they are taking real steps to control their data, rather than blindly accepting all.** People aren’t rejecting data collection altogether; they’re rejecting vague terms, overly complex choices, and unclear value.

In short, privacy has taken a bigger role in the consumer decision journey. That first consent banner isn’t a compliance formality, it’s a brand moment. Done right, it is an opportunity to demonstrate restraint while building respect and trust. Done poorly, it creates mistrust from the first click and also depletes your consented data in the process.

**Marketers have a powerful opportunity to lead the privacy conversation, guiding user-first experiences that convert consent into connection, and privacy into performance.**

By rethinking consent UX and messaging — from dark patterns to clear value propositions — brands can turn a once-maligned legal step into a moment that builds trust, credibility, and even conversion. This shift also reframes privacy from a blocker to a growth lever. It’s not just about minimizing opt-outs. It’s about maximizing opt-ins and a chance to prove that you respect your customers and users and their preferences.

 **Tip for Marketers:** Design your consent banner like it’s a landing page. See it as your first handshake with customers. Turn consent into a contextual brand moment. Ask for consent only when relevant (for instance, at checkout) and explain the benefit (“so we can personalize your cart”). That clarity builds trust and strengthens brand connection.





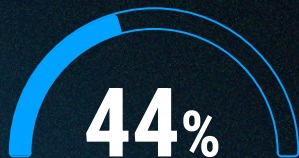
# CHAPTER 3

## Not all brands are trusted equally

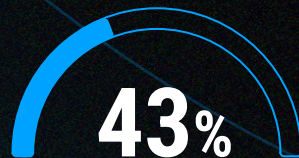


Data privacy and security are playing an increasingly crucial role in building trust. Consumers are clear about what they expect from brands in exchange for their data. Meeting these expectations is no longer a bonus. It's a baseline for earning attention, engagement, and repeat interaction.

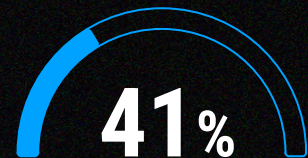
### What would improve your trust in how a brand uses your data?



Transparency about  
data use

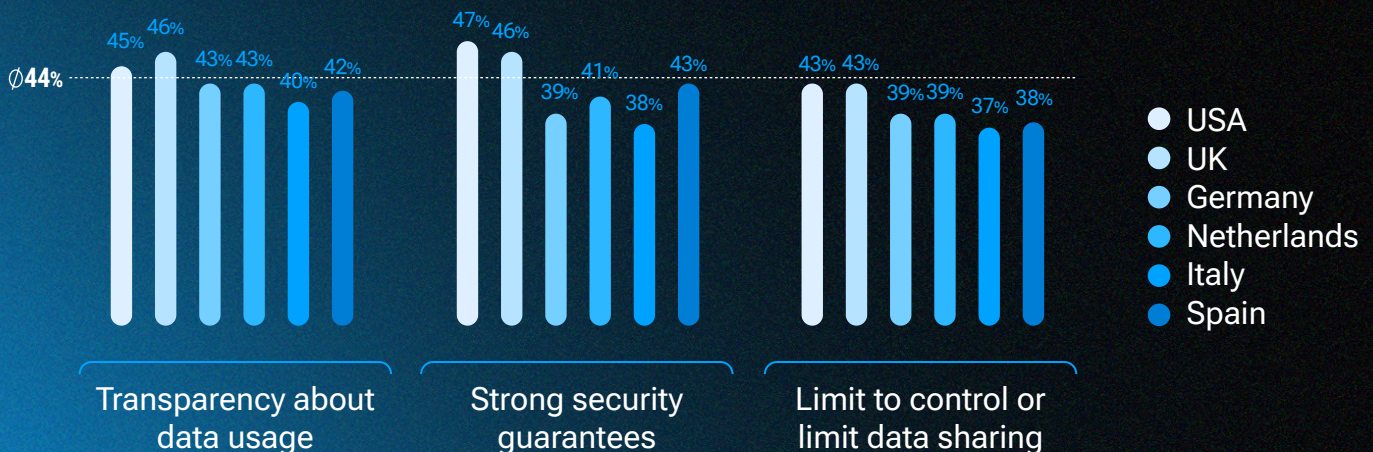


Strong security  
guarantees



Ability to limit or  
control data sharing

### Trust building factors





Trust isn't freely given any more – it's conditional. Brand promises aren't taken at face value. Consumers want evidence: proof that their data is being handled responsibly and securely, and that they're being given real choices and control.

Consumers also don't trust all brands equally, and the differences in where they place trust might be surprising. External factors play a critical role in establishing that trust. Industries that are more heavily regulated, like finance and the public sector, tend to enjoy higher levels of trust when it comes to data collection and usage.

### Most Trusted to Least Trusted Industries

By contrast, technology and social media companies have been increasingly scrutinized by regulators, media, and the public, so it's unsurprising that these industries have lower levels of trust among consumers. That said, highly customer-centric sectors like retail might be surprised to find they rank so low, while among Gen Z, 39 percent rank social media platforms as trustworthy.



By contrast, technology and social media companies have been increasingly scrutinized by regulators, media, and the public, so it's unsurprising that these industries have lower levels of trust among consumers. That said, highly customer-centric sectors like retail might be surprised to find they rank so low, while among Gen Z, 39 percent rank social media platforms as trustworthy.

Similarly, trust is no longer strongly tied to geography. Consumers are nearly as cautious about sharing data with businesses from the **USA (73%)** as they are with those from **China (77%)**.

Other European countries, traditionally viewed as more trusting, rank only an average **10% points lower in terms of consumer caution**, highlighting that trust is relative, not guaranteed.





## Know your audience

The good news? Regardless of what sector or geography your brand is in, consumers are clear about what they want and how brands should engage with them before collecting and using personal data.

Brands that communicate clearly and openly from the outset about how they handle data won't just achieve compliance with regulations, they'll build credibility and deepen customer relationships and engagement. And in a competitive landscape, trust becomes your most powerful differentiator.

 **Tip for Marketers:** Understand that security and transparency build brand trust more than geography or industry.



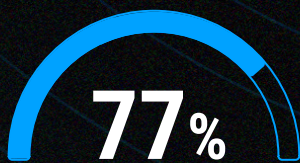


# CHAPTER 4

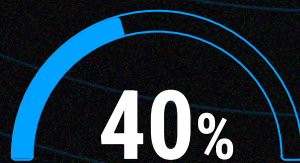
## From privacy pressure to brand power



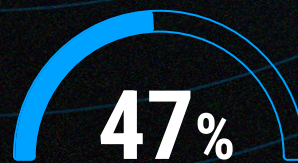
Consumers are clearly signaling that privacy management matters to them, but many still don't fully understand how it works. This creates a powerful opportunity for forward-thinking brands: those who lead with education and transparency will build trust and gain a meaningful advantage.



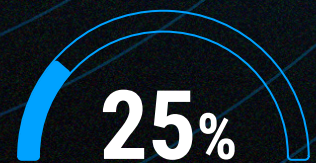
of global consumers don't fully understand how their data is being collected and used by brands.



believe they have rights, but don't know what they are.



trust regulators to protect them and hold companies accountable



are sceptical that regulators can - or will - keep up with Big Tech's power.

Consumers want to feel in control of their data, but many still don't fully understand how it's collected or used. There's momentum: consumers are clicking "accept all" less often, adjusting their settings, and signaling that they care more and more about how their data is being collected and used. But a knowledge gap remains.

That confusion creates a wedge between your brand and your audience. When clarity is missing, so is confidence, and with it, the willingness to share data.

This is where brands can step in – not as enforcers, but as enablers. While trust in governments and regulators is uncertain, brands that offer transparency and guidance can become the trusted voice consumers turn to, because in the digital world trust is the foundation of lasting relationships.

Privacy-literate behavior is growing, but there's still a need for education. In today's complex digital landscape, clarity and reassurance are rare, but valuable.





## Move beyond compliance to customer advocacy.

The smartest brands won't wait for regulation to catch up. Instead, they'll act as privacy champions:

**Collection:** Setting up CMPs (Consent Management Platforms) correctly and supporting contextual consent

**Activation:** Using consented data responsibly to deliver trustworthy experiences

**Measurement:** Making use of Server-Side Tagging (SST) to control data flows responsibly

And most importantly – communicating these practices clearly and positively.

This isn't just about giving people choices. It's about making those choices meaningful and easy to understand. When brands take the lead, they not only build trust. They create differentiation, loyalty, and long-term growth.



**Tip for Marketers:** Pivot to building a modern, consent-based journey, one that considers how you collect, activate, and measure consented data at every touchpoint.





# CHAPTER 5

## Action plan - A marketer's guide to Privacy-Led growth



The digital economy runs on data, but the rules of engagement are being rewritten. A EUR 600 billion ecosystem built on passive tracking and third-party data is being reshaped by global regulation, heightened consumer awareness, and the erosion of traditional identifiers.

Today, consumers don't share data by default. As the research in this report shows, they're opting out, speaking up, and making intentional privacy choices. Meanwhile, marketers — still the biggest users of personal data — are facing a new reality: privacy isn't just a legal obligation. It's a brand differentiator, and a strategic necessity.

### From obligation to opportunity: the privacy-led shift

**Privacy-Led Marketing** is how modern brands turn these pressures into performance. It's a mindset shift from compliance checklists to competitive strategy. It doesn't slow growth, it unlocks it.

This approach goes beyond permission and policy. It's about embedding trust at every touchpoint to fuel better data, richer relationships, and sustained growth. Privacy becomes a driver of marketing precision, not a barrier to it.

At its core, Privacy-Led Marketing is about activating the full value of data — consented and responsibly modeled — across the lifecycle: from collection and activation, to measurement and optimization.

These aren't just more respectful experiences — they're more effective ones. When done right, they reduce friction, increase confidence, and convert attention into loyalty.





## What Privacy-Led Marketing unlocks

Brands that embed privacy into their customer experience gain far more than compliance:

**Trust as a growth lever:** Transparency builds emotional equity, not just legal cover

**First-party strength:** Direct customer relationships reduce third-party dependency

**Performance control:** Privacy-respecting data strategies increase agility and long-term marketing resiliency

Privacy-Led Marketing turns rising expectations into brand elevation. It's a way to demonstrate your values — not just declare them — and convert trust into tangible business results.





## How to start: the Privacy-Led Marketing checklist

These principles build on the research and insights in this report. Apply them across your marketing journey.

### Lead with clarity in a world of AI and algorithms

**Why it matters:** AI and Big Tech have made consumers more aware — and more wary — of how their data is used. Marketers must lead with clarity and respect.

- **Communicate clearly.** Don't just collect data, explain how it's used. Transparency builds trust.
- **Put value on the table.** Make sure users understand what they get in return for sharing their data.
- **Earn more than just consent, earn attention and understanding.** Use privacy as a way to show your brand's ethics, not just your legal compliance. Because collecting data isn't only about permission, it's about understanding your customers, their needs, and what matters to them.

### Design privacy as a brand touchpoint

**Why it matters:** Design your consent banner like it's a landing page. See it as your first handshake with customers.

- **Give consent the UX treatment.** Design banners like landing pages - clear, helpful, and branded.
- **Turn clicks into conversations.** Make privacy interactive and engaging, not passive or hidden.
- **Respect the pause.** When users stop to consider consent, reward their attention with clarity and control.

### Use transparency to differentiate your brand

**Why it matters:** Consumers trust what they can see — not just where you're from or what industry you're in.

- **Deliver on expectations.** Lead with transparency, show your security practices, and make control real.
- **Don't rely on reputation.** Even traditionally trusted sectors are being re-evaluated — trust must be earned at every touchpoint.
- **Let transparency drive differentiation.** Use your data practices as a brand advantage, not a backend process.

### Make privacy understandable — and valuable

**Why it matters:** Consumers want to act on privacy — but many don't know how. Marketers can bridge the gap.

- **Educate without overwhelming.** Use plain language, helpful visuals, and clean UX to guide users.
- **Make privacy accessible.** Well-designed banners and preference centers are brand tools, not legal obligations.
- **Champion understanding.** Be the brand that helps people feel confident in their choices — not confused by them.





**Join the Privacy-Led Marketing movement.**  
**Explore strategies. Share ideas.**  
**Lead with trust.**

Privacy-led growth isn't just possible — it's already happening.  
Join a community of marketers turning trust into their most  
valuable brand asset.

**Visit [privacyledmarketing.com](https://privacyledmarketing.com)**

— your hub for insights, tools, and community.



#### **About Usercentrics**

Usercentrics is a global market leader in solutions for data privacy and activation of consented data. Our technology solutions enable customers to manage user consent for websites, apps and CTV. Helping clients achieve privacy compliance, Usercentrics is active in 195 countries on more than 2.3 million websites and apps. We have over 5,400 partners and handle more than 7 billion monthly user consents. Learn more on [usercentrics.com](https://usercentrics.com)