

Consent Management Market

Market Size and Forecasts (2020 - 2030), Global and Regional Growth Opportunity Analysis

Coverage: Component (Solution, Services); Deployment (On-premises, Cloud-based), End-use Industry (Retail, Government, IT and Telecom, BFSI, Healthcare, Education, Media & Entertainment, Others) and Geography (North America, Europe, Asia Pacific, Middle East and Africa, and South & Central America)

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NOTES:

- *The list of companies included in the scope are as per standard report format and the list can be modified/expanded as per client's requirement*
- *The sequence/list of companies do not represent their current position in the market.*
- *The list of countries provided in the report are part of standard report and can be customized as per client's requirement*

1. Introduction

1.1 The Insight Partners Research Report Guidance

- The report provides qualitative and quantitative analysis of global consent management market segmented by component, deployment, end-use industry, and geographic regions.
- Chapter 1 provides a brief description of the market under study.
- Chapter 2 mentions the key takeaways, highlighting the key trends and outlook of the global consent management market.
- Chapter 3 provides the research methodology of the study.
- Chapter 4 provides Ecosystem analysis along with PEST analysis for global scenario.
- Chapter 5 highlights the key market dynamics in the consent management market, including factors that are driving the market, prevailing deterrents, potential opportunities, and future trends. Impact analysis of drivers and restraints are covered under this section.
- Chapter 6 discusses the global consent management market scenario, in terms of historical market values, and forecast till 2030.
- Chapters 7 to 10 discuss the market segments by component, deployment, end-use industry, and geographic analysis across North America, Europe, Asia Pacific (APAC), Middle East & Africa (MEA), and South America (SAM), along with the major factors governing the growth of the market in these regions.
- Chapter 11 describes the impact of COVID 19 outbreak on global consent management market.
- Chapter 12 describes the industry landscape analysis. It provides detailed description of various business activities, such as market initiatives, new developments, mergers, and joint ventures, across the world.
- Chapter 13 provides competitive landscape covering heat map analysis by key players and company positioning and concentration analysis.
- Chapter 14 provides the detailed profiles of key companies operating in the global consent management market. The companies have been profiled based on their key facts, business description, products & electronic assembly, financial overview, SWOT analysis, and key developments.
- Chapter 15, i.e., the appendix is inclusive of the company overview, word index, contact information, and disclaimer section.

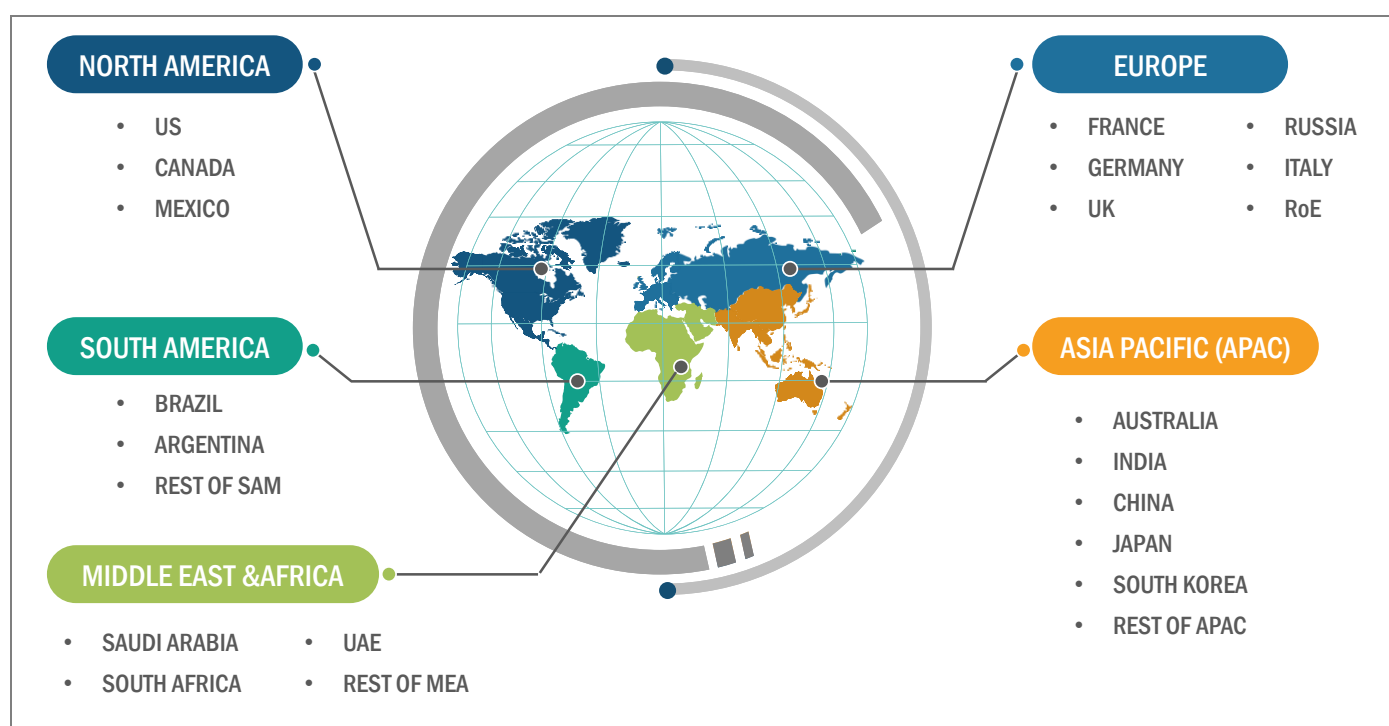
1.2 Market Segmentation

Table 1. Consent Management Market Segmentation

COMPONENT	DEPLOYMENT	End-use Industry
SOLUTION	ON-PREMISES	RETAIL
SERVICES	CLOUD-BASED	GOVERNMENT
		IT AND TELECOM
		BFSI
		HEALTHCARE
		EDUCATION
		MEDIA & ENTERTAINMENT
		OTHERS

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

Figure 1. Consent Management Market Segmentation, By Geography



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

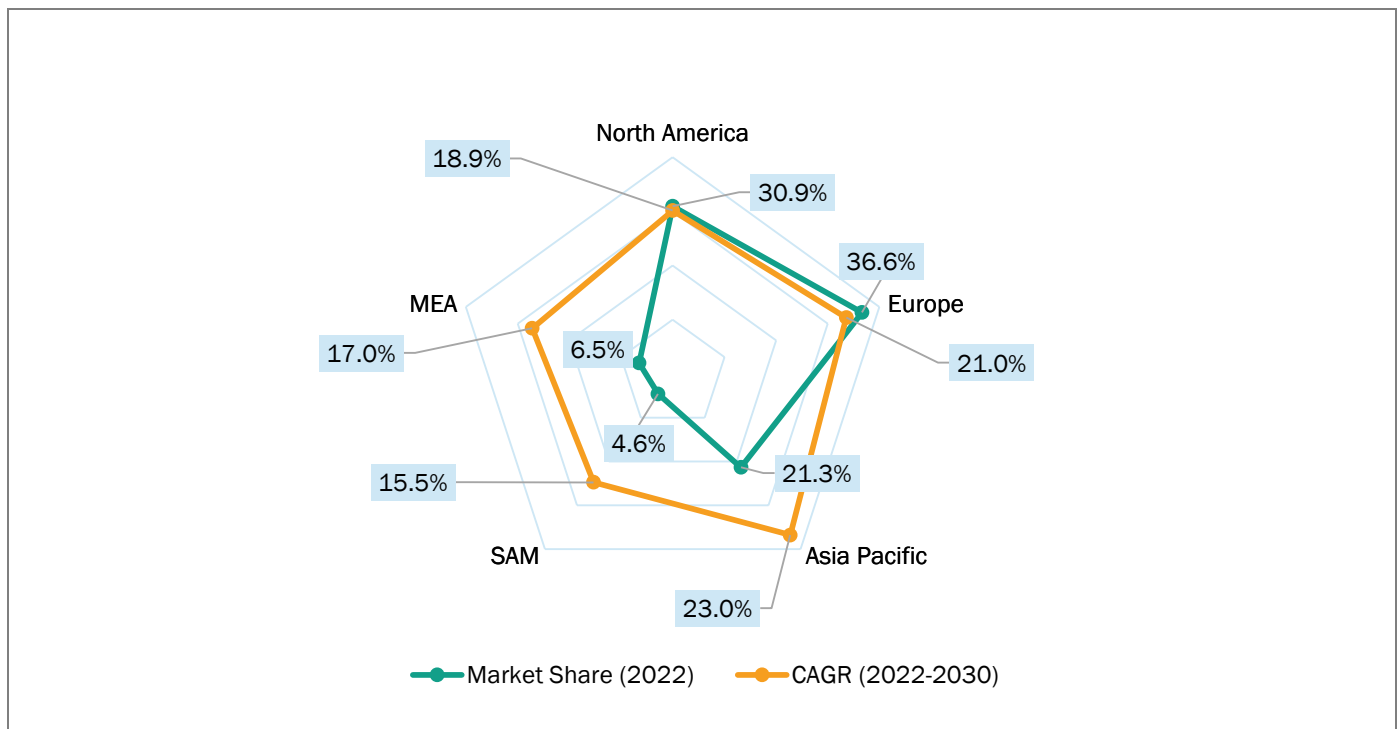
The global Consent Management market is segmented based on component, deployment, end-use industry and geography. The segmentation in this research study has been finalized post in-depth secondary research and extensive primary research. In addition, the market is also segmented on the basis of Deployment offered by the leading participants in the industry in order to understand widely used market specific terminologies. Thus, we have incorporated the segments of the research and have finalized the market segmentation.

2. Executive Summary

2.1 Key Insights



2.2 Market Attractiveness

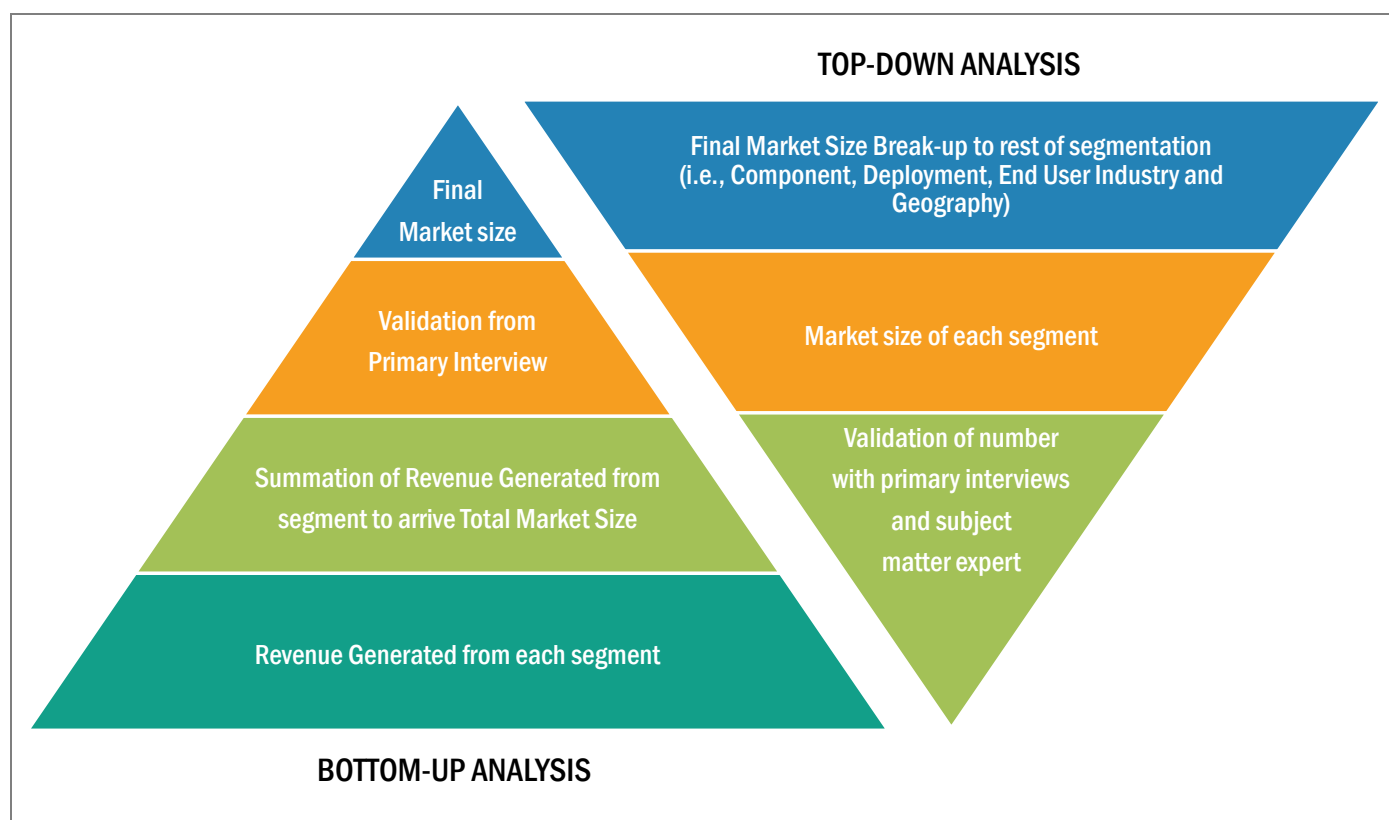


Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

3. Research Methodology

The Insight Partners dedicated research and analysis teams consist of experienced professionals with advanced statistical expertise and Marketing, Market research and consulting backgrounds in various industries including Aerospace and Defense, Automotive and Transportation, Biotechnology, Chemicals and Materials, Food and Beverages, Electronics and Semiconductor, Healthcare IT, Manufacturing and Construction, Medical Device, Deployment, Information and communication.





Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The Insight Partners adheres to the codes of practice of the Market Research Society (www.mrs.org.uk) and Strategic and Competitive Intelligence Professionals (www.scip.org).

The following methodology has been followed for the collection and analysis of data presented in this report:

3.1 Coverage

The objective of updating “The Insight Partners” coverage is to ensure that it represents the most up-to-date vision of the industry possible.

The estimated revenues of all major companies, including private and governmental, are gathered and used to prioritize coverage.

Companies which are making the news, or which are of particular interest due to their innovative approach, are prioritized.

3.2 Secondary Research

The research process begins with exhaustive secondary research using internal and external sources to obtain qualitative and quantitative information relating to each market. The secondary research sources that are typically referred to include, but are not limited to:

- Company websites, annual reports, financial reports, broker reports and investor presentations
- Industry trade journals and other literature
- National government documents, statistical databases and market reports

- News articles, press releases and web-casts specific to the companies operating in the market.

NOTE: All the financials considered in Company Profile's section have been standardized to US\$. This has been achieved after converting the financials (for those not in US\$) with respective currency exchange rates of the particular year.

3.3 Primary Research

"The Insight Partners" conducts hundreds of primary interviews a year with industry participants and commentators in order to validate its data and analysis.

A typical research interview fulfils the following functions:

- Provides first-hand information on the market size, market trends, growth trends, competitive landscape and future outlook.
- Validates and strengthens secondary research findings.
- Further develops the analysis team's expertise and market understanding.

Primary research involves email interactions and telephone interviews for each market, category, segment and sub-segment across geographies. The participants who typically take part in such a process include, but are not limited to:

- Industry participants: VPs, business development managers, market intelligence managers and national sales managers
- Outside experts: Valuation experts, research analysts and key opinion leaders specializing in the information and communication industry.

4. Consent Management Market Landscape

4.1 Overview

At present, the whole world is experiencing strict data privacy legislation. Globally operating organizations have no options left but to adopt cross-border and cross-regulatory compliance strategies to operate efficiently. One of the major factors that have drastically impacted the way companies interact with customers and use their data is the growing data protection regulations by the governments of different countries. One such regulation is General Data Protection Regulation (GDPR), a data privacy regulation enforced by European Union (EU) on May 2018. As per the GDPR, an organization must take consent from the citizen whose personal data it wants to process. Apart from GDPR, various other privacy laws prevail across the globe, such as Brazil's Lei Geral de Proteção de Dados (LGPD) and California Consumer Privacy Act (CCPA). Consent management platforms and solutions help the website meet the GDPR and compliance by gaining user consent for collecting their data for further use during website visits via cookies. They also help the websites automate and simplify the consent management process.

Some of the other drivers fuelling the growth of consent management market include stricter data privacy regulations, proliferation of data-driven technologies, increasing awareness and concerns for data privacy, and increasing demand for improved the customer experience. On the other hand, some of the restraining factors of the consent management market include diverse regional regulations, user resistance and consent fatigue, cost of compliance, and implementation challenges.

The rise in incidents of data breaches across various industries is propelling the growth of the consent management market. For instance, in November 2021, California Pizza Kitchen (CPK), a restaurant chain, revealed a data breach that exposed the personal details of ~100,000 current and former employees. To reduce such data breaches and protect the information of the citizens, governments of various countries are enhancing their data protection regulations, which is further raising the need for consent management solutions. Furthermore, the growing need for the integration of blockchain technology in consent management solutions to augment user control and privacy will further propel the growth of the consent management market during the forecast period.

The consent management market is segmented into component, deployment, and end-use industry. Based on component, the consent management market is segmented into solution and services. In terms of deployment, the consent management market is bifurcated into on-premise and cloud. Based on end-use industry, the consent management market is segmented into retail, government, IT & telecom, BFSI, healthcare, education, media & entertainment, and others.

Crownpeak Technology Inc, consentmanager AB, International Business Machines Corp, Didomi SAS, HIPAAT International Inc, TrustArc Inc, OneTrust LLC, Piwik PRO LLC, PossibleNOW Inc, Rakuten Marketing LLC, CASSIE (SYRENIS LTD), and Didomi SAS are among the key players that are profiled during this market study. In addition to these players, several other essential market players were also studied and analysed to get a holistic view of the global consent management market and its ecosystem.

4.2 PEST Analysis

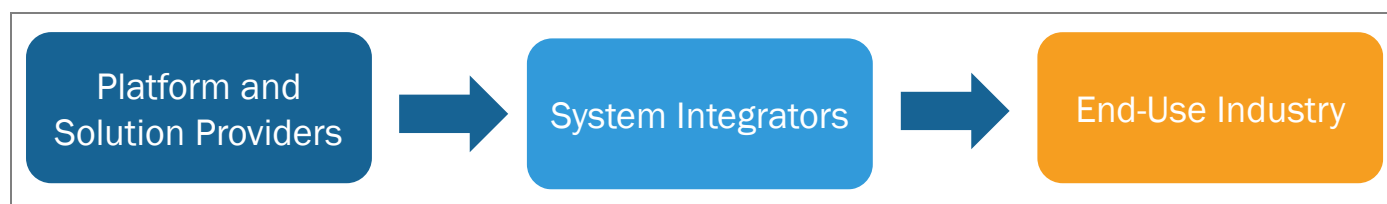
Figure 2. Global- PEST Analysis

P	POLITICAL	- Government regulations such as general data protection regulation (GDPR), California Consumer Privacy Act (CCPA), and Brazil's Lei Geral de Proteção de Dados (LGPD) aim to protect all users from privacy and data breaches in today's data-driven world. Although the fundamental principles of data privacy still hold to the previous directive, many changes were proposed to the regulatory policies. Through this regulatory compliance, residents have a right to receive new privacy rights, and it also imposes strict regulation over the companies to hold and secure users' data by following the stringent rules framed around accountability and transparency. This is expected to allow the privacy management software providers to enable the organization to assess their compliance through their platform. - Governments of various countries worldwide are trying to attract FDI in the technology sector with the increasing need for enhanced technology-related services. For instance, China government relaxed the restrictions on new entries to encourage overseas and private capital to invest in its economy. Also, continuous investment in the high-tech sector and other FDIs received by developing economies, such as India, Singapore, and Brazil, can offset the decline in economies and support the growth of the countries.
E	ECONOMIC	The governments of developed nations are investing heavily in technological research and development. They are also very concerned with consumer rights and are working hard to develop data privacy legislation to increase customer trust in their jurisdictions. However, the expense of adopting consent management technologies and continuous maintenance may impact acceptance rates in developing countries.
S	SOCIAL	- Growing global population and rising public income, mostly in developing countries, led to an upgrade in lifestyles, boosting the entire e-commerce industry. This can be attributed to the growth of the consent management market, as online websites require huge data storage for global customers. - The social trend of adopting better living standards has led to an increase in the population shift from rural to urban areas, leading various industries such as construction, real estate, and infrastructure management and government regulatory bodies to gather and manage data and ensure regulatory compliance. These industries are adopting consent management solutions to streamline daily operations and improve efficiency.
T	TECHNOLOGICAL	- The development of AI systems based on machine learning heavily relies on access to vast datasets to train and improve their algorithms. The trend of adoption of advanced technologies among the masses has continued to soar over the years. Also, with the rising population, the use of internet-based applications is increasing, resulting in massive data generation. The high adoption of the Internet for financial services among countries leads to vast data. Therefore, data management solutions are gaining momentum, propelling the consent management market's growth. - Technological advancements in consent management solutions, such as improved user interfaces, automation, and seamless connections, are projected to drive the market forward. Furthermore, data collection and analytics technology developments are likely to serve as a driving force in the consent management market.

Source; The Insight Partners Analysis

4.3 Ecosystem Analysis

Figure 3. Ecosystem: Consent Management Market



Source: The Insight Partners

The consent management market ecosystem constitutes the following major stakeholders: platform and solution providers, system integrators, and end-use industry.

Platform providers are corporations or organizations that provide enterprises with a deployment platform for consent management products and services. They create, implement, and administer software platforms or services that assist businesses in collecting, storing, and managing user consent data. These consent management platforms include legal guidance with their subscription plans and a free version. They support general data protection regulation (GDPR), California consumer privacy act (CCPA), and Lei Geral de Proteção de Dados Pessoais (LGPD) compliance. Further, a large number of solutions for consent management are available in the market that are mutually exclusive of each other. These individual solutions are then integrated and brought upon a common single platform by the solution providers. Also, they provide compatibility among the different consent management solutions so that end-users can centrally handle the entire data. These consent management solution providers enable the seamless collection of various security solutions from third-party vendors and platform providers. They provide their consent management solutions in different modules or components to the end-users depending upon end-user requirements. The consent management solution providers provide end-user integration, consulting, and various support services.

System integrators play an important role in the consent management ecosystem by assisting organizations in ensuring that consent management solutions are effectively implemented and customized as necessary by the end-use industry. Furthermore, system integrators provide ongoing support and maintenance to ensure trust between the business and the end-user industry. Regulatory bodies, which include government authorities and agencies, are in charge of data protection legislation and play an important role in shaping and administering the consent management market. Compliance with company policies and regulations is a major motivator for firms to adopt consent management solutions in their daily operations. California's Consumer Privacy Act (CCPA) and the European Union's General Data Protection Regulation (GDPR) are two of the most important regulatory bodies recognized globally in the current scenario. Further, the consent management market serves a diverse range of businesses, each with its own set of data processing requirements and compliance requirements. Implementing an appropriate consent management solution can assist firms in these industries in building trust with their users and demonstrate a commitment to data privacy, security, and prevention of consumers personal information. Retail, government, IT & telecom, BFSI, healthcare, education, and media & entertainment are major end-user industries mentioned in the consent management market.

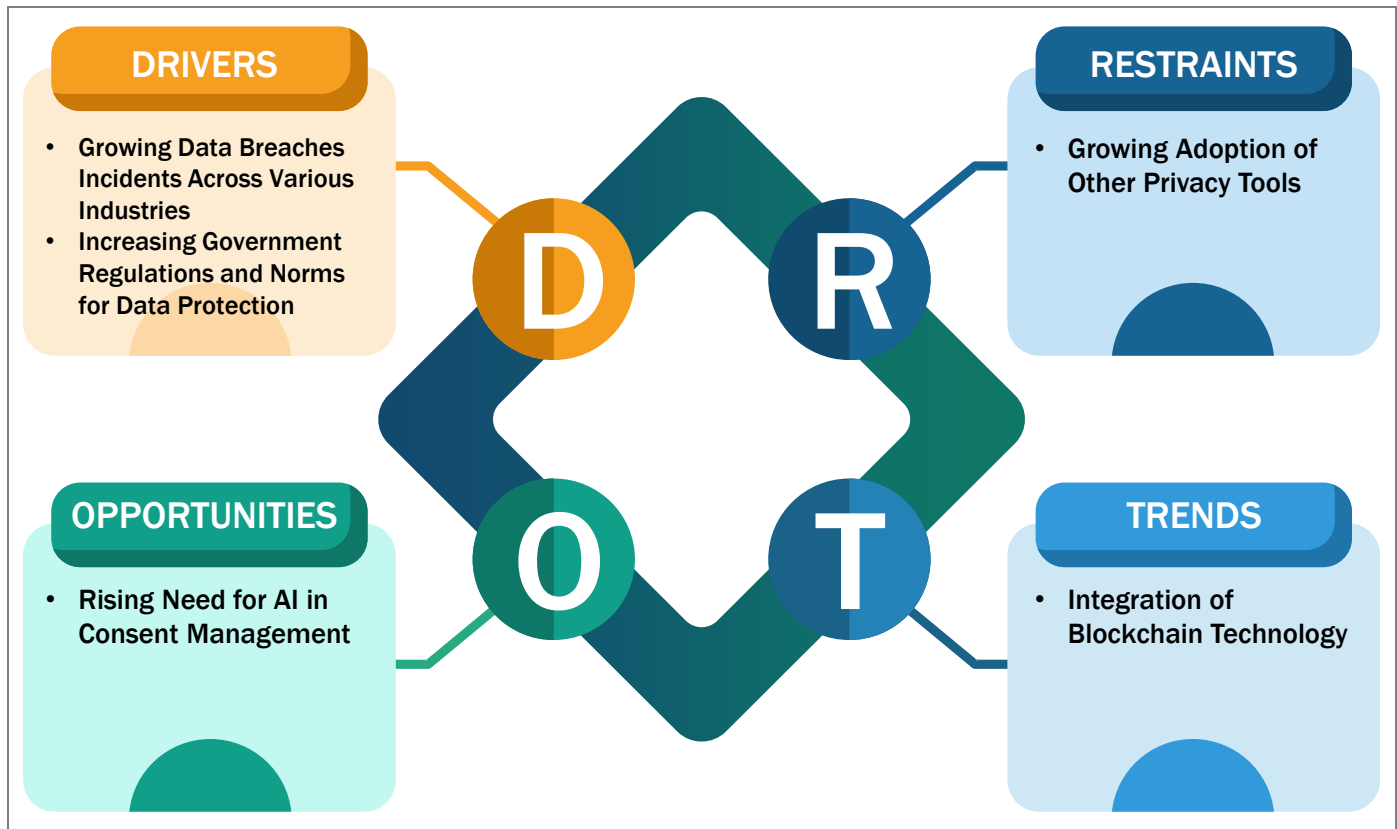
4.3.1 List of Vendors in the Value Chain

Sr No	Company Name	Contact Details	Location	Product/ Service
1.	BigID	info@bigid.com	North America, Europe, APAC, MEA	Data Security Platform, Data Security Posture Management, Data Privacy Management, Data Discovery and Classification, Others
2.	KnowNow Information Limited.	023 9216 0640	Europe	Consent Management, Preference Management
3.	Quantcast	(415) 738-4755	APAC, Europe, North America	Cookieless Advertising, Brand Advertising, Performance Advertising, Consent Management, Others
4.	CookieBot	+45 50333777	Global	Consent Management, Cookie Management, Others
5.	iubenda s.r.l	info@iubenda.com	Global	Privacy and Cookie Policy Generator, Privacy Controls and Cookie Solution, Terms and Conditions Generator, Consent Database, Others
6.	CIVIC	+44 131 624 9830	Europe	Consent Management, Cookie Management
7.	SAP	1-800-266-2208	Global	Commerce, Customer Data Management, Sales Automation, Customer Service, Marketing
8.	SOURCEPOINT	(740) 363-6677	Global	Privacy Management, Compliance Management
9.	Osano	1800-425-2067	Global	Consent Management, DSAR Automation, Vendor Risk Management, Privacy Program Management
10.	Otonomo	info@otonomo.io	Global	Fleet Solutions, Dynamic Blurring Engine, Consent Management
11.	Verizon	908-559-2001	North America, Europe, APAC, MEA	Data Consent Automation, Data Privacy Automation, Others
12.	Usercentrics	usercentrics.com	Global	Website Consent Management App, Consent Management, Free Data Privacy AuditFree Data
13.	Cassie (Syrenis Ltd)	+1 97251-1158	North America, Europe	Consent Management, Preference Management, Cookie Management, Identity Service, Progressive Profiling
14.	Salesforce, Inc.	1-800-667-6389	Global	Consent Management, Customer Service Automation, Digital Customer Engagement, Voice & Phone Support, Employee Service, Service Cloud Pricing
15.	CookieYes	info@cookieyes.com	Global	Cookie Consent Solution, WordPress Plugin
16.	MineOS	+1 614 8880256	Global	Data Mapping, Privacy Requests, Privacy Center, Evidence by Mine, Consent Management
17.	Securiti	info@securiti.ai	North America	Data Consent Automation, Data Privacy Automation, Others
18.	Transcend	support@transcend.io	Global	Consent, Data Mapping, Privacy Requests, and Assessments
19.	DataGrail, Inc.	+1 650-781-3680	Global	DataGrail Platform, Request Manager, Live Data Map, Risk Monitor
20.	Ketch Kloud, Inc.	+1 895-174-311	North America	Data Mapping & Discovery, Consent & Preference Management, Risk Assessments & Reporting, Data Subject Rights Fulfillment

Sr No	Company Name	Contact Details	Location	Product/ Service
21.	PossibleNow	1-866-357-6540	North America	Consent Management and Customer Insight Management
22.	Seers	info@seersco.com	Europe	Consent Management Platform
23.	Adzapier	+1 (855) 212-9063	North America	Consent Management Platform
24.	Cookie Tractor	info@cookietractor.com	Europe	Consent Management Platform, Cookie Management Platform
25.	Cassie (Syrenis Ltd)	+44 20 45519501	Europe	Consent Management Platform

5. Consent Management Market - Key Industry Dynamics

Figure 4. Consent Management Market - Key Industry Dynamics



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

5.1 Drivers

5.1.1 Growing Data Breaches Incidents Across Various Industries

In recent years, it has been noticed that several organizations across various industries have faced criticism because of customer data leakage. Customer information is the prime resource of every organization, and securing the data is one of the critical tasks of the organization. However, in this digitalized era, the rise in cybercrimes is affecting various organizations' brand value. Several organizations across industries have faced major challenges in securing their customers' data from cyber hackers in recent years. These incidents have led various large organizations and small & medium enterprises to opt for consent management solutions to protect the information of their customers. This factor is helping the players operating in the consent management market to capitalize their customer base and revenues. Some of the data breach incidents that occurred in recent years are:

- In January 2021, Parler, the conservative social media app, witnessed that a hacker scraped its data. Approximately 70 TB of information was leaked, which included 99.9% of posts, messages, and video data containing EXIF data — metadata of date, time, and location. In addition, Parler's Verified Citizens, or the users who had verified their identity by uploading their driving license or other photo ID, were also exposed.

- In February 2021, Nebraska Medicine announced that through a malware attack, a hacker accessed and copied files containing the personal and medical information of 219,000 patients.
- In March 2021, SITA, a global IT company that supports 90% of the world's airlines, confirmed that it fell victim to a cyberattack, exposing the personally identifiable information (PII) of various airline passengers.
- In May 2021, various law offices of Bailey & Galyen faced a cyberattack that exposed the personal information of an undisclosed number of clients and employees.
- In June 2021, Wegmans Food Markets, a US supermarket chain, notified an undisclosed number of customers that their data was exposed after two of its cloud-based databases were misconfigured and made publicly accessible online.

Such a growing number of data breach incidents in various industries is raising the need for consent management platforms, propelling the growth of the market.

5.1.2 Increasing Government Regulations and Norms for Data Protection

The European Union's (EU) General Data Protection Regulation (GDPR) is one of the strongest privacy and security laws in the world, which came into effect in May 2018. The regulation was introduced to improve the protection of European data rights and also standardize the process of safeguarding these rights. Similarly, in June 2021, the government of the US established the Data Protection Agency, an independent agency to regulate specified high-risk data practices and the collection, processing, and sharing of personal data. This agency will oversee the use of high-risk data practices, which include using automated decision systems, such as machine learning, profiling individuals on a large scale, and processing personally identifying biometric information, such as genetic data. Also, in 2022, the Ministry of Electronics and Information Technology (MeitY) of India released a draft of the Digital Personal Data Protection Bill, which introduced a new framework for personal data protection. Through this bill, the government of India aimed to outline the rights and duties of the citizen and the obligations to use collected data lawfully. Thus, the rise in changes and upgrades in regulations for data protection is shifting the vendors' focus on developing the tools that would allow the companies to assess their compliance. In addition, in the coming years, jurisdictions worldwide are expected to create new requirements for data protection, and companies would raise their demand to leverage a comprehensive and mature compliance solution that would integrate with existing security as well as IT and marketing investments. This is further fueling the growth of the consent management market.

Furthermore, the demand for corporate governance and compliance across the region, mainly in China, India, Singapore, and Hong Kong is increasing, as the concern toward the protection of personal data of the employee as well as the customer in the organization is also increasing. Also, the continuous growth in digitalization and increase in government initiatives for the protection of personal and confidential information across the region are leading to the rise in the adoption of consent management solutions across various organizations. Furthermore, digital innovation propelled by enhanced internet connectivity as well as the adoption of smartphones, especially across Southeast Asia, is leading toward the growth of the consent management market. In Australia, in 2022, the government announced increasing fines under the Privacy Act 1988 for data breaches. Under this, the maximum fine for a serious invasion or repeated invasion of privacy was increased to approximately US\$ 6.79 million (AUD 10 million), three times any benefit obtained from the invasion breach and 10% of Australian annual revenue. Similarly, through GDPR, the EU had asked all websites to receive and safely store the explicit consent of users before collecting data from individuals.

Also, in the US, the CCPA demands businesses to provide more control to the residents of California over the personal information generated online. Such obligatory nature of the governments of the countries mentioned above is making it compulsory to use consent management solutions to avoid situations of a data breach, further creating an opportunity for the growth of the consent management market.

5.2 Market Restraints

5.2.1 Growing Adoption of Other Privacy Tools

Large companies are less worried about the budgetary issues concerning the new privacy tools when compared with smaller companies. In addition, larger companies are the most sought targets for data breaches. The firms in the US have already implemented solutions for enterprise-wide privacy management, including privacy components. According to the survey by the International Association of Privacy Professionals (IAPP) and TrustArc, the consent management platforms that have emerged for capturing, managing, and transferring the consent of the user for personal data use is the least adopted technology among the top ten privacy technologies. As per the survey, one of the reasons is that consent is “the nexus where there are the most cooks in the kitchen,” this might result in confusion as to who should manage that sphere, rising the adoption of other technologies. The other technologies include network activity monitoring, secure enterprise communications, website scanning/cookie management, privacy program assessment/management, incident response management, data mapping and flow, personal data discovery, privacy information management, and de-identification/pseudonymity. These are the most used privacy management platforms worldwide. Thus, the growing adoption of the above technologies is hampering the growth of the consent management market.

5.3 Market Opportunities

5.3.1 Rising Need for AI in Consent Management

With the rise of artificial intelligence (AI) and its increasing use in various industries, the need to integrate AI, particularly to ensure GDPR compliance, is increasing. Using AI in consent management can help automate various processes, such as data collection, storage, and analysis. It also has the potential to streamline the compliance process and make it more efficient, which can further help reduce the risk of human error. For example, the technology can be used to identify and flag sensitive data, helping organizations keep track of their data assets and avoid breaches. Moreover, AI can be used to ensure that data is processed as per the GDPR. For instance, AI can be programmed to help ensure that only the minimum necessary data is processed, and further, the data will be erased when no longer needed. This will help organizations avoid penalties and fines resulting from GDPR non-compliance.

In addition, AI can also help automate Data Protection Impact Assessments (DPIAs), as DPIAs are mandatory under GDPR policies and should be conducted when a new technology that can have a high risk to the rights and freedoms of individuals is introduced. Also, AI algorithms can analyze data and identify potential risks, saving time and effort of the organizations in conducting the assessments. Furthermore, AI-powered chatbots can help interact with data subjects and obtain their consent for data processing. This chatbot can help present the privacy notice and answer questions about data collection and its use, allowing individuals to provide their consent in a conversational manner. Additionally, an AI system could be trained in order to predict which data subjects are likely to provide consent for data processing depending on their past behavior and demographic information. This information can be further used to target and optimize the consent management process. Moreover, smart forms or AI-powered forms can be used to obtain the consent of individuals in a user-friendly and efficient manner.

Also, these forms can automatically adjust to the data subject's preferences and provide personalized privacy notices based on the collected data. Thus, all the above benefits of AI in consent management are expected to raise its need, creating an opportunity for the growth of the consent management market during the forecast period.

5.4 Market Trends

5.4.1 Integration of Blockchain Technology

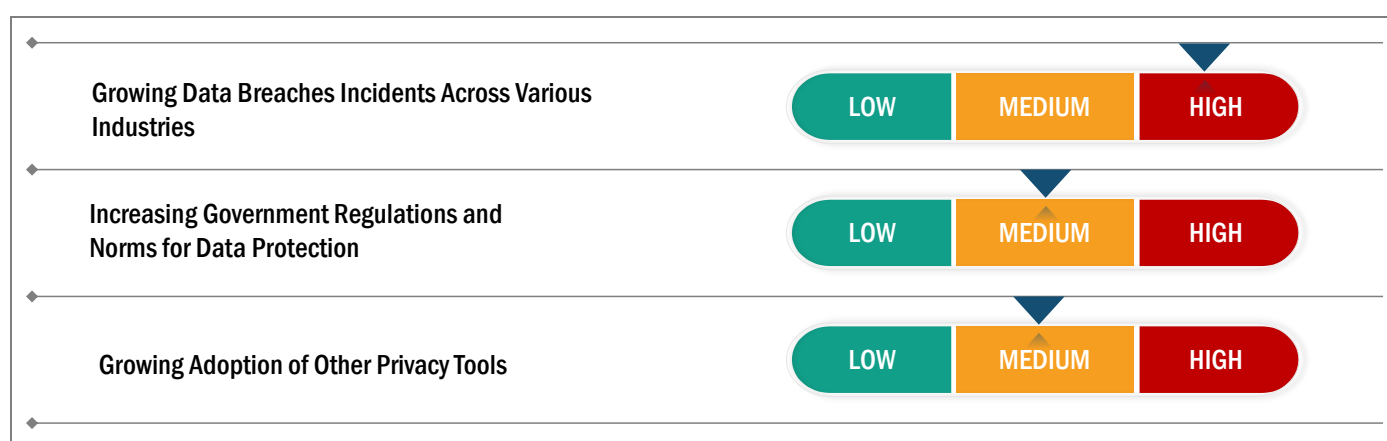
Despite the GDPR guidelines that have been in effect since May 2018, the level of compliance differs from one organization to another. The stress toward full compliance has increased, driving organizations to evaluate their data collection processes further. However, many are struggling with the cost of integration and technology. Many GDPR implementations of proof-of-consent are projected to involve Blockchain technology in the coming years. The integration of Blockchain into consent management solutions will augment user control and privacy.

Trust improvement, immutability because of the unfeasibility of ledger falsification, and transparency are some of the exhibiting features of Blockchain-based solutions. Orange, one of the prominent players in telecommunications networks globally, also provides consent management solutions. The company uses Blockchain technology in its Orange Consent Management Service solution. Additionally, the company has made it possible to share consent management functions in different applications. The use of Blockchain technology in consent management overcomes the issues present in traditional consent management solutions. Earlier in the solution, dedicated records were used, and thus, the user had to describe his consent for each application. The integration of the technology will help the consent management providers to resolve issues present in traditional consent management solutions. Thus, the growing need for the integration of blockchain technology in consent management solutions is anticipated to further propel the growth of the market during the forecast period.

5.5 Impact of Drivers and Restraints:

The figure below depicts the impact of driving and restraining factors the consent management market:

Figure 5. Impact Analysis of Drivers and Restraints

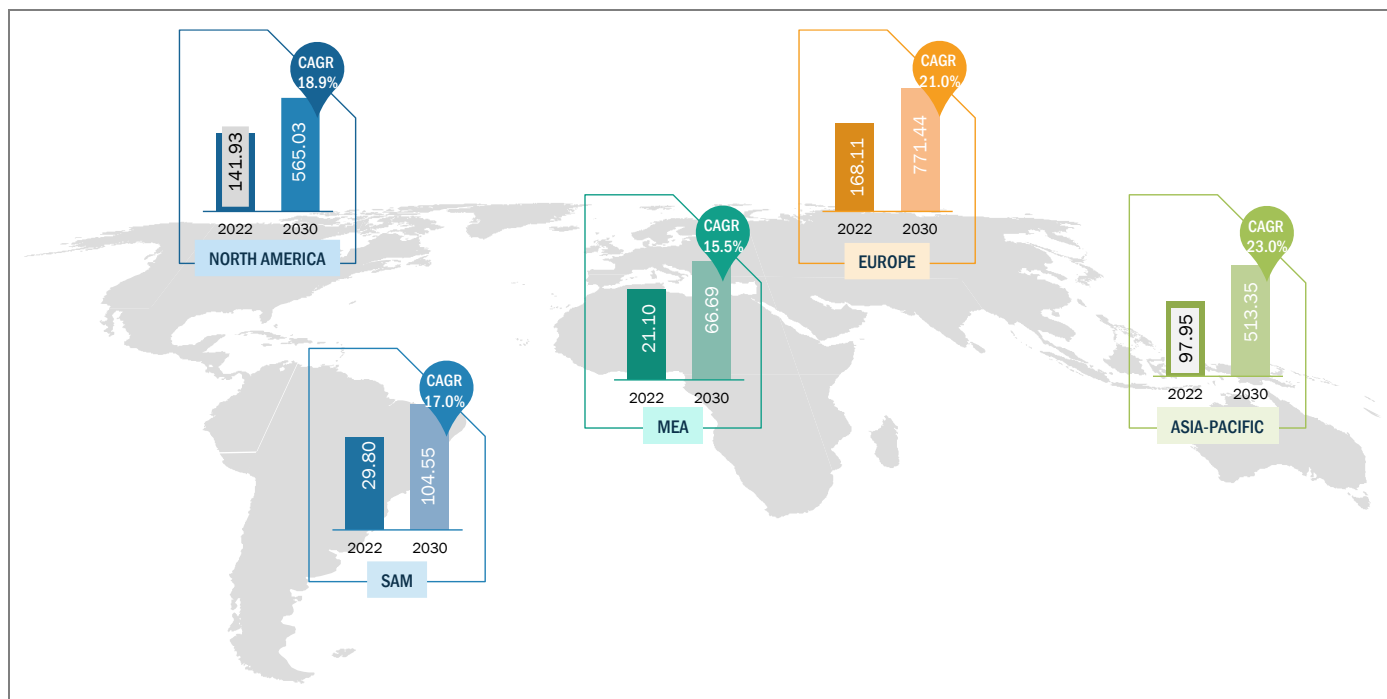


Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

6. Consent Management Market - Global Market Analysis

6.1 Consent Management Market Overview

Figure 6. Consent Management Market Breakdown by Geography, 2022 and 2030 (%)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market is broadly segmented into five major regions: North America, Europe, Asia Pacific (APAC), Middle East & Africa (MEA), and South America (SAM). Europe held the largest market share in 2022, followed by North America and APAC. Further, APAC is expected to register the highest CAGR in the market from 2022 to 2030.

The consent management market in Europe has witnessed tremendous growth owing to growing awareness of data compliance and majorly the advent of the GDPR legislation by the European Union (EU). Because of this, the market players in the region are developing advanced solutions to efficiently protect the personal data of the citizens. For instance, in May 2021, DataGuard, a data privacy and information security company, launched a new Consent and Preference Management platform, DataGuard Consent Management. The platform helps capture and manage the consent and preferences of customers, users, and employees.

The increasing data breach activities in North America is one of the major factors propelling the growth of the consent management market. In 2021, Twitter suffered a data breach that affected 5.4 million accounts. Similarly, in August 2022, Twilio, a US messaging giant, confirmed that cybercriminals accessed data that belonged to 125 customers. Also, in August 2022, DoorDash, a food delivery giant, confirmed a data breach, exposing the personal information of 4.9 million customers, workers, and merchants. Such data breach activities in the region are raising the need for consent management solutions, propelling the market growth.

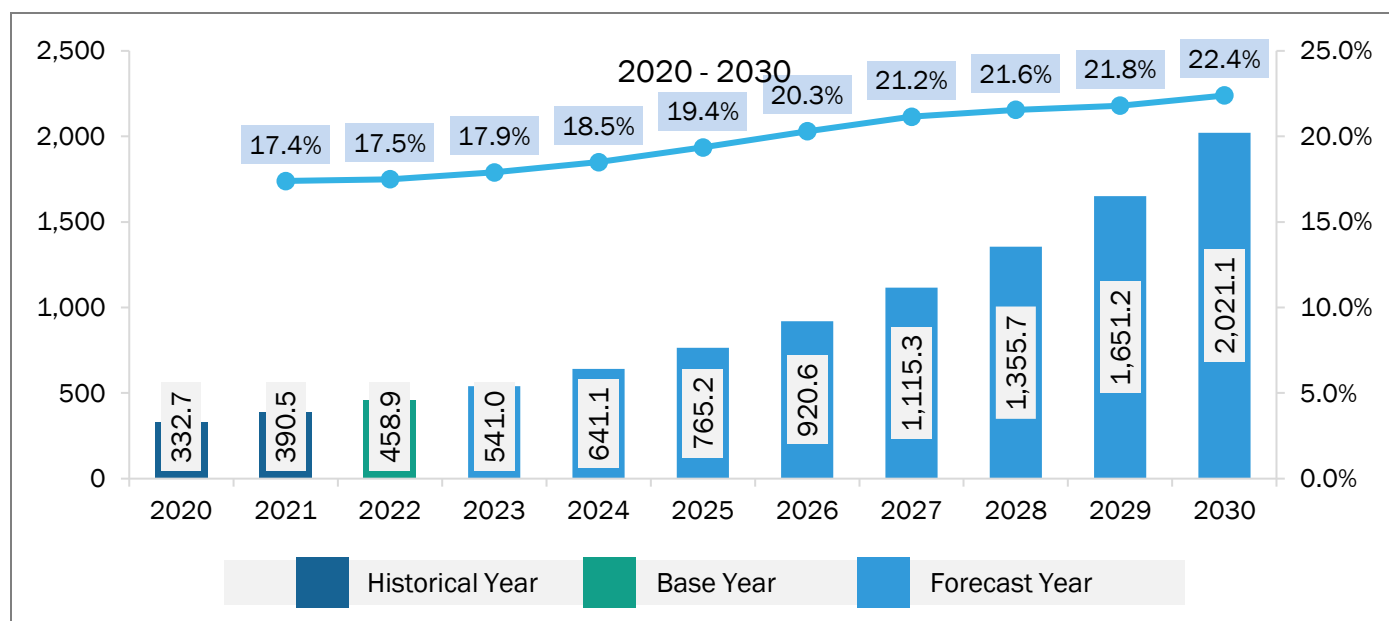
APAC is witnessing tremendous growth in the IT & telecommunication sector, which is raising consumer demands to manage their preferences and consent properly. To cater to this, governments of various APAC countries have implemented different data protection laws and regulations. Some of these regulations are the Act on the Protection of Personal Information (APPI) by the government of Japan, Personal Information Protection Law (PIPL) by the government of China, and Digital Personal Data Protection Bill by the government of India, among others. Thus, strict regulations by government bodies are expected to fuel the growth of the consent management market in APAC.

Growing digitization and increasing use of connected devices in the MEA and SAM regions are raising concerns about data protection among individuals. Hence, governments of countries in the MEA and SAM are implementing various policies and regulations, such as UAE's Data Protection Law, Saudi Arabian's Personal Data Protection Law (PDPL), and Brazil's General Personal Data Protection Law (LGPD), to protect the personal information of the citizens, further boosting the consent management market growth.

6.2 Consent Management Market Revenue (US\$ Million), 2022 – 2030

The consent management market accounted for US\$ 458.89 Million in the year 2022 and is expected to grow at a CAGR of 20.4% during the forecast period, to account for US\$ 2,021.05 Million in the year 2030.

Figure 7. Consent Management Market Revenue (US\$ Million), 2022 & 2030



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

6.3 Consent Management Market Forecast and Analysis

The market size in the consent management market is shown in the table provided below:

Table 2. Consent Management Market Revenue and Forecasts To 2030 (US\$ Million)

Global	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Revenue	332.67	390.54	458.89	541.03	641.12	765.20	920.56	1,115.28	1,355.65	1,651.19	2,021.05	20.4%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

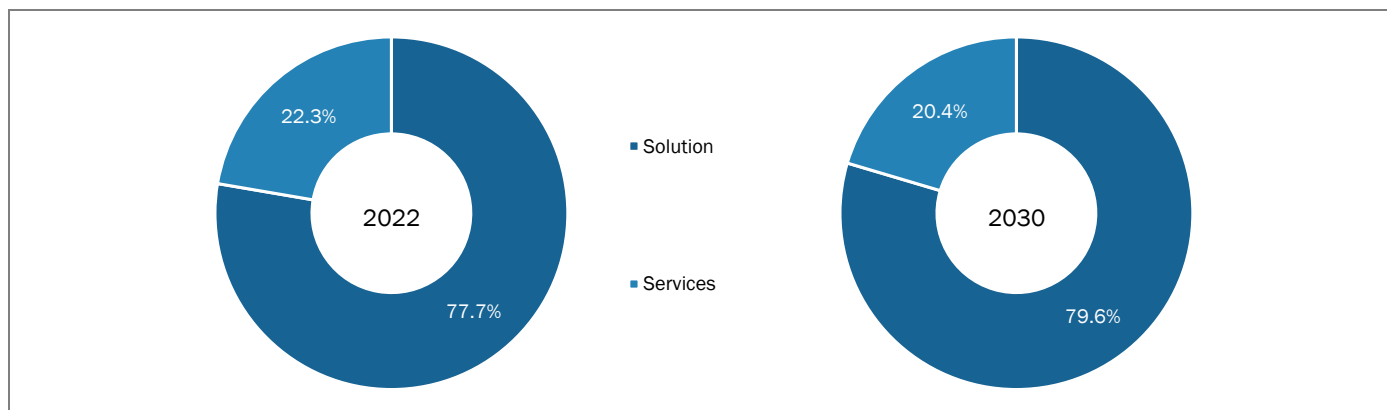
Analysis

Europe dominates the global consent management market and is expected to grow with CAGR of 21.0% and reach US\$ 771.44 Million 2030 from US\$ 168.11 Million in 2022.

7. Consent Management Market Analysis - Component

Global consent management market is segmented by component into solution and services, The solution segment held the largest share in 2022 accounting for 77.7% and is expected to account for 79.6% in 2030.

Figure 8. Consent Management Market Share (%) – Component, 2022 and 2030



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

Table 3. Consent Management Market Revenue and Forecasts To 2030 (US\$ Million) – Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	256.85	302.48	356.51	421.63	501.16	599.99	724.00	879.79	1,072.61	1,310.35	1,608.62	20.7%
Services	75.82	88.07	102.37	119.40	139.95	165.21	196.56	235.49	283.04	340.84	412.43	19.0%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 356.51 million in 2022 and is projected to reach US\$ 1,608.62 million by 2030; it is expected to grow at a CAGR of 20.7% from 2022 to 2030.

7.1 Solution

7.1.1 Overview

Consent management solutions are software tools or platforms that assist organizations in managing user consent and compliance with data protection regulations such as the European Union's General Data Protection Regulation (GDPR) or the California Consumer Privacy Act (CCPA) in North America.

Consent management Platform (CMP) solutions provide website users with precise information about how their online behavior can be tracked, why it is tracked, and which businesses and organizations request to use it. Then, CMP technologies provide end users with a clear choice as to whether they want their online behavior to be collected and exploited by all or some parties identified. Users' preferences are then maintained in a central database for compliance purposes, and website visitors can modify their privacy settings at any time.

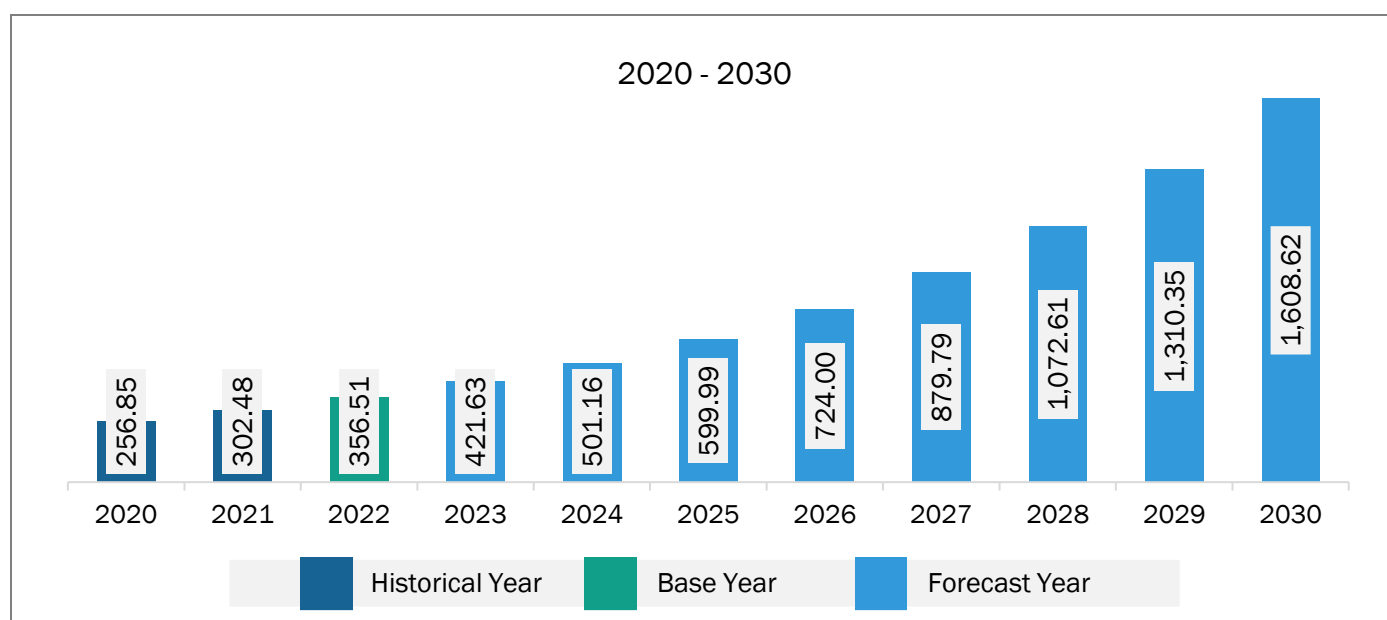
Businesses may maintain better control over user data and demonstrate their commitment to respecting individuals' privacy rights by adopting consent management tools.

There are various developments by leading solutions providers in the consent management market. For instance, in 2022, FTI Consulting, Inc. announced the development of a new suite of solutions under its Information Governance, protection, and Security ("IGP&S") business to address the growing risks at the conference of digital advertising and data protection regulation. The comprehensive suite of Advertising Technology ("AdTech") Privacy solutions from FTI Technology will assist businesses in navigating developing data privacy concerns in digital advertising and online consent management.

7.1.2 Solution Market Revenue and Forecasts To 2030 (US\$ Million)

The solution segment was valued at US\$ 356.51 million in 2022 and is projected to reach US\$ 1,608.62 million by 2030; it is expected to grow at a CAGR of 20.7% during the forecast period.

Figure 9. Solution Market Revenue and Forecasts To 2030 (US\$ Million)



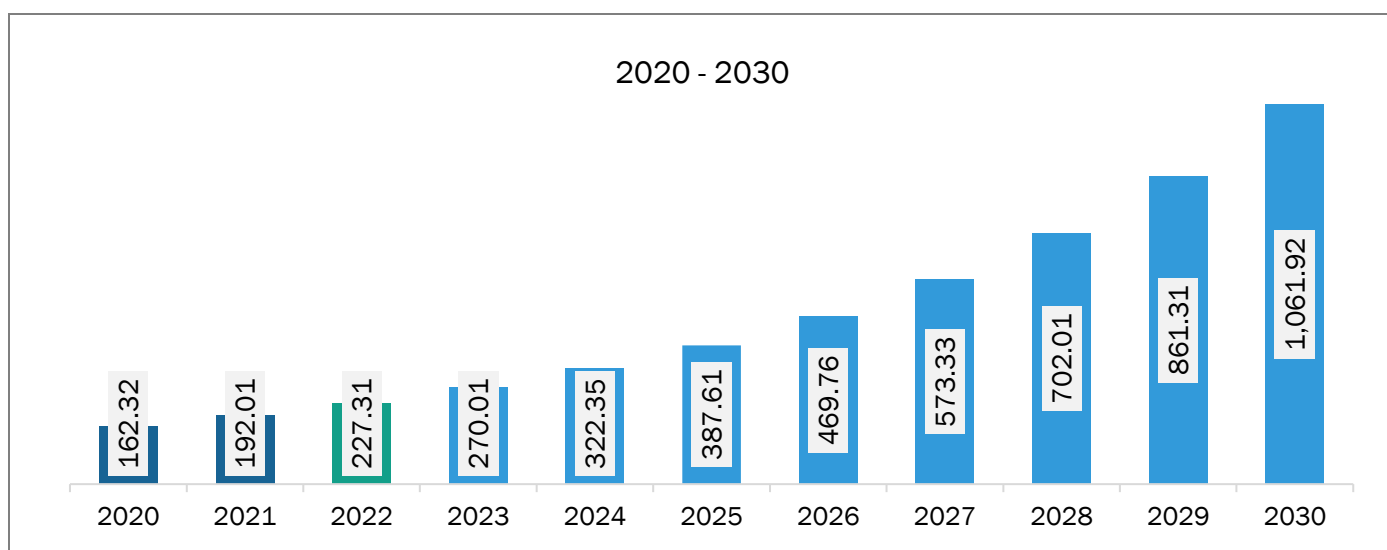
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

7.1.2.1 Preference Management

7.1.2.1.1 Overview

A cookie consent manager is a software program that assists businesses in obtaining cookie consent from website visitors, managing cookies depending on those preferences, and recording that consent. A cookie consent management tool can be a valuable asset to a company that wants to comply with ever-changing data privacy rules. Noncompliance with the GDPR can result in significant fines. Amazon, for example, was fined US\$ 877 million in 2021 for GDPR violations. Although most firms will not accrue GDPR infractions at the same rate as Amazon, GDPR fines can pose an existential danger to a growing corporation. Osano is a cookie management solution; websites that use Osano automatically deploy a cookie permission banner that complies with the visitor's local data privacy regulation and language preference.

Figure 10. Preference Management Market Revenue and Forecasts To 2030 (US\$ Million)



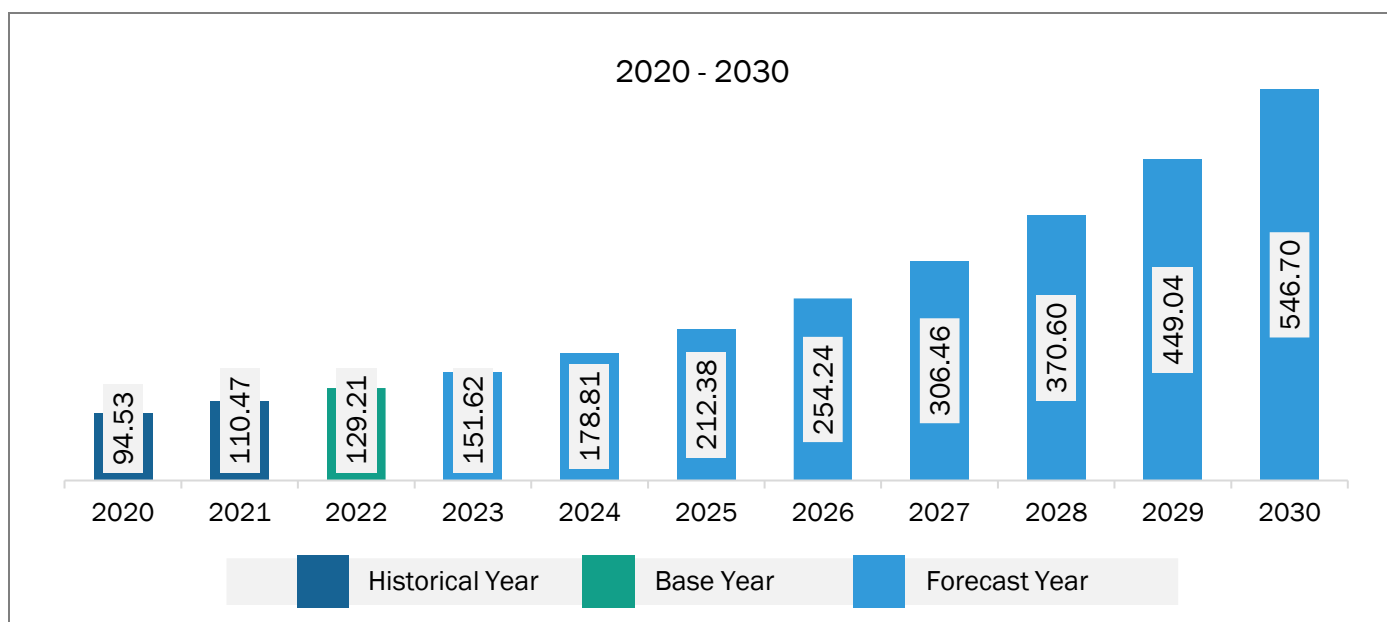
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

7.1.2.2 Cookie Management

7.1.2.2.1 Overview

Preference management is a system that allows customers to select how businesses engage with them. Preference management allows consumers to decide the type and frequency of communications while ensuring that businesses comply with legislation. Additionally, preference management can include content preferences. Consumers may suggest companies of their choices for how frequently and where they want to receive messages, such as newsletters, updates about new products and services, and marketing emails. Consent and preference management may keep businesses compliant with current and new data privacy requirements, lowering the likelihood of fines. Companies that employ consent and preference management can build brand trust and credibility by giving their customers control over whether, how, and when their data is used. Businesses can optimize their marketing efforts when clients request specific information about products and services. The EU General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) govern preference management solutions. Companies have to clarify and capture when consent is sought.

Figure 11. Cookie Management Market Revenue and Forecasts To 2030 (US\$ Million)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

7.2 Services

7.2.1 Overview

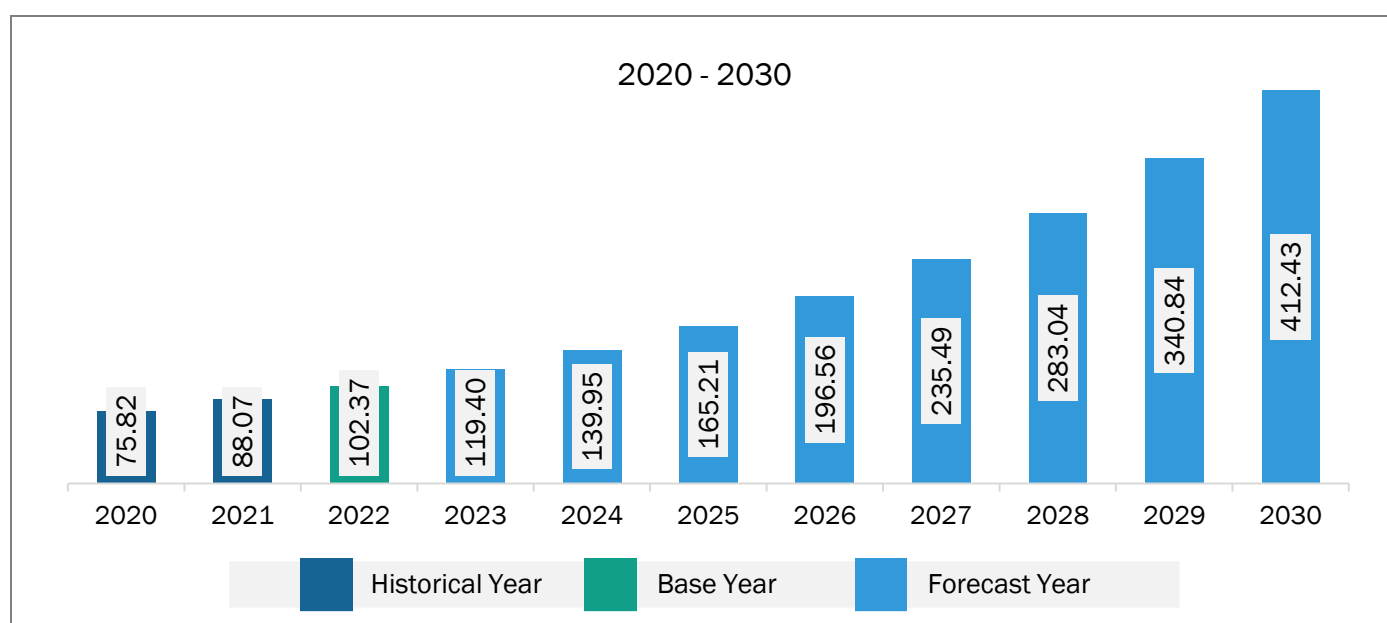
Services are an important element of the consent management market because they bridge the gap between technology solutions and the specific needs of organizations. Businesses may streamline their consent management processes, maintain regulatory compliance, and develop user confidence by honoring their privacy choices by leveraging the expertise of service providers. Companies specializing in consent management solutions offer various expert services such as consultation and implementation, customization, regulatory compliances, user interface design, and training and education.

Managed consent management services include security, communication, and data analytics, depending on the company's demand. A few products and service providers offer a portfolio ranging from products to fully managed services. The consent management service providers' customer support team works throughout the consent management implementation process. The consent management software is backed up by a broad range of solutions and services to address the complexities of managing different forms of consent from a broad array of customers. Global players, such as IBM, Rakuten, and Cybot, are major service providers in the consent management market.

7.2.2 Services Market Revenue and Forecasts To 2030 (US\$ Million)

The services segment was valued at US\$ 102.37 million in 2022 and is projected to reach US\$ 412.43 million by 2030; it is expected to grow at a CAGR of 19.0% during the forecast period.

Figure 12. Services Market Revenue and Forecasts To 2030 (US\$ Million)

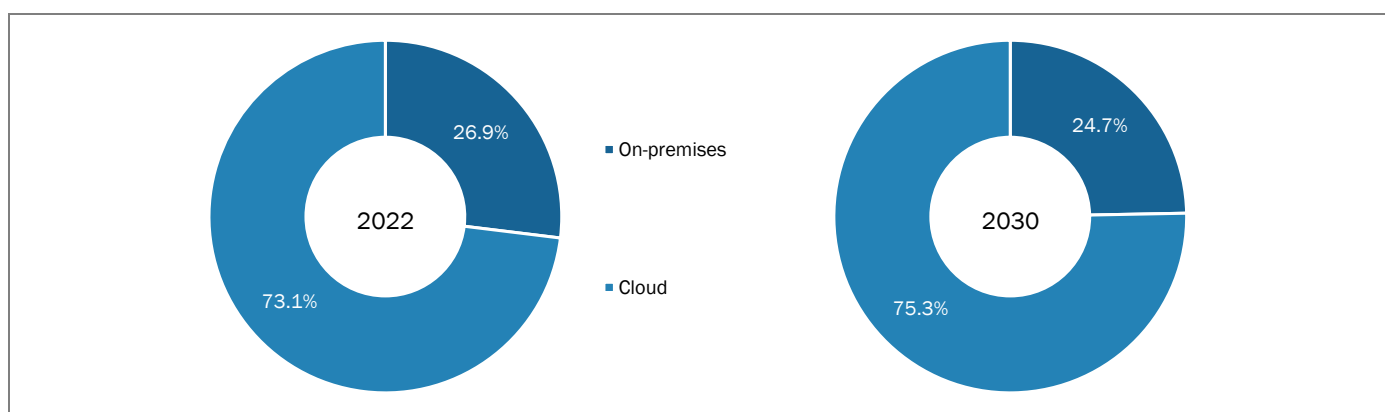


Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

8. Consent Management Market Analysis - Deployment

Global consent management market is segmented by deployment into on-premises and cloud-based. The cloud-based segment held the largest share of the consent management market accounting for 73.1% in 2022 and is expected to account for 75.3% in 2030.

Figure 13. Consent Management Market Share (%) – Deployment, 2022 and 2030



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

Table 4. Consent Management Market Revenue and Forecasts To 2030 (US\$ Million) – Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	91.39	106.26	123.63	144.30	169.25	199.89	237.91	285.08	342.65	412.58	499.09	19.1%
Cloud-based	241.28	284.28	335.26	396.73	471.87	565.31	682.66	830.20	1,013.00	1,238.61	1,521.96	20.8%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 335.26 million in 2022 and is projected to reach US\$ 1,521.96 million by 2030; it is expected to grow at a CAGR of 20.8% from 2022 to 2030.

8.1 On-premises

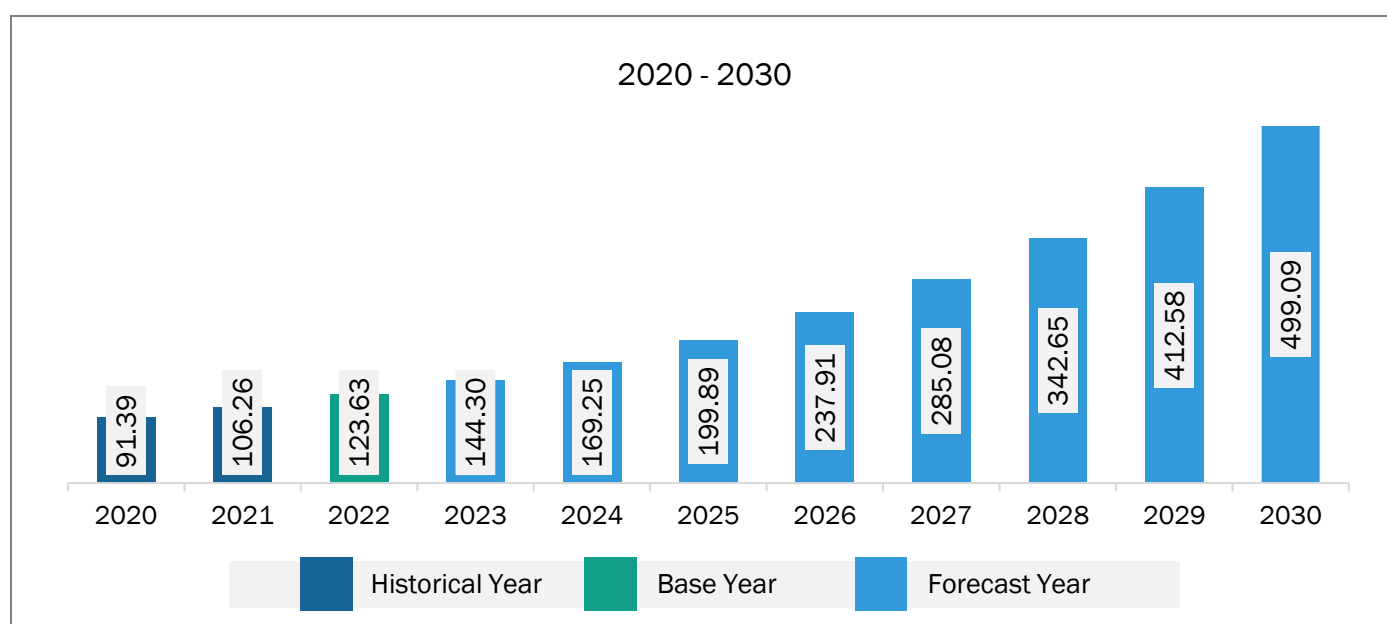
8.1.1 Overview

In consent management, an on-premises platform is a software system installed and hosted locally on an organization's infrastructure. Certain enterprises have typically preferred on-premises solutions due to data control and security concerns, particularly in industries with stringent data protection regulations. The consequence of enterprises using on-premises deployment type is high costs related to installation, management, upgrade, and maintenance of complete solutions to run better than cloud computing environment. Therefore, on-premises deployment is majorly adopted by large and well-established companies capable of investing huge capital to maintain this software. The on-premises structure needs software licenses, in-house server hardware, integration capabilities, and IT technicians to support, operate, and manage the complexities and issues that may arise during software access.

8.1.2 On-premises Market Revenue and Forecasts To 2030 (US\$ Million)

The on-premises segment was valued at US\$ 123.63 million in 2022 and is projected to reach US\$ 499.09 million by 2030; it is expected to grow at a CAGR of 19.1% during the forecast period.

Figure 14. On-premises Market Revenue and Forecasts To 2030 (US\$ Million)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

8.2 Cloud-based

8.2.1 Overview

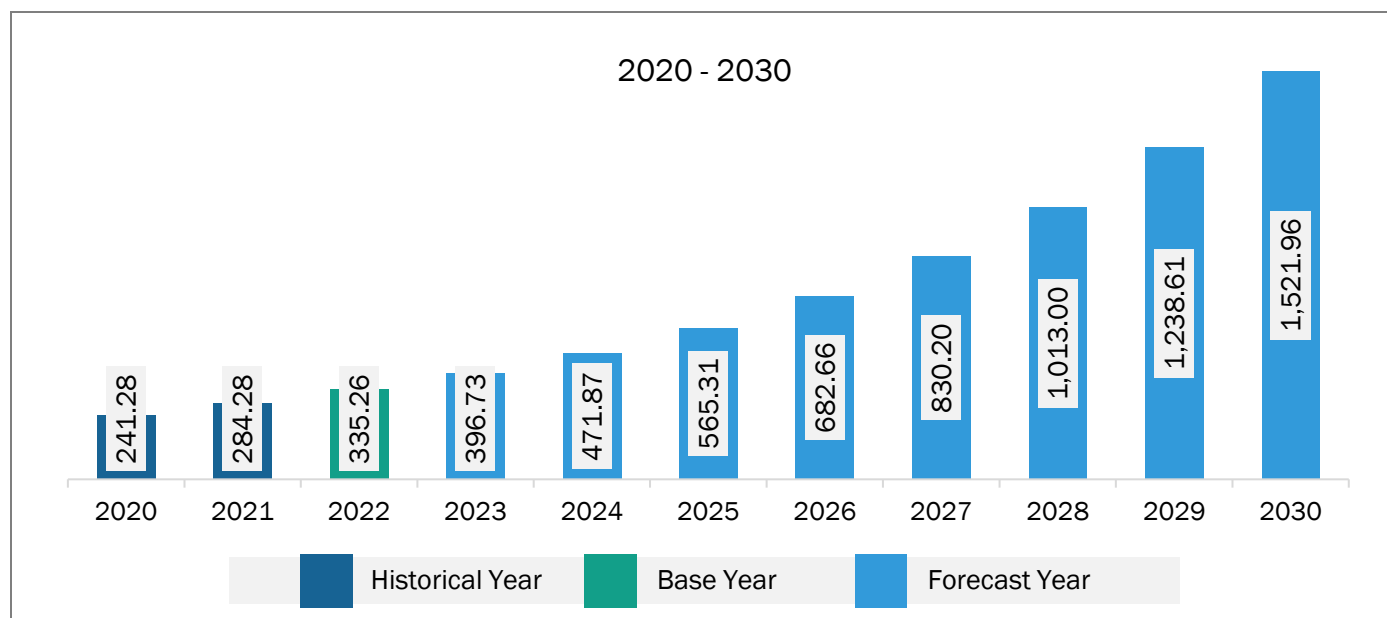
A cloud-based platform in consent management refers to a software solution that is hosted and provided via the cloud, allowing companies to access and control their consent-related operations via the Internet. Because of their scalability, flexibility, and ease of implementation, cloud-based permission management solutions have become a popular alternative for many enterprises. Cloud-based consent management has also grown in popularity since it allows information to be accessed wherever and whenever needed. CitiusTech's consent management solution also uses cloud storage platforms such as GCP, AWS, and Azure. This offers it the flexibility to allow members and payers to access/manage records regardless of the geographic presence.

The future of consent management lies in API-driven solutions, allowing organizations to securely connect and exchange consent data with other systems, such as CRM and other marketing tools. As technology advances, cloud-based consent management solutions can leverage data analytics and AI to provide personalized consent experiences based on user behavior and preferences. Major players such as Google, IBM, Cisco, and Rakuten are involved in constant product launches and developments related to cloud-based consent management deployments. For instance, in 2021, Google Cloud made its Healthcare Consent Management API available to provide healthcare application developers and clinical researchers with a straightforward approach to managing consumers' consent over health data use. The Healthcare Consent Management API is part of Google Cloud Platform's (GCP) Cloud Healthcare API offering.

8.2.2 Cloud-based Market Revenue and Forecasts To 2030 (US\$ Million)

The cloud-based segment was valued at US\$ 335.26 million in 2022 and is projected to reach US\$ 1,521.96 million by 2030; it is expected to grow at a CAGR of 20.8% during the forecast period.

Figure 15. Cloud-based Market Revenue and Forecasts To 2030 (US\$ Million)

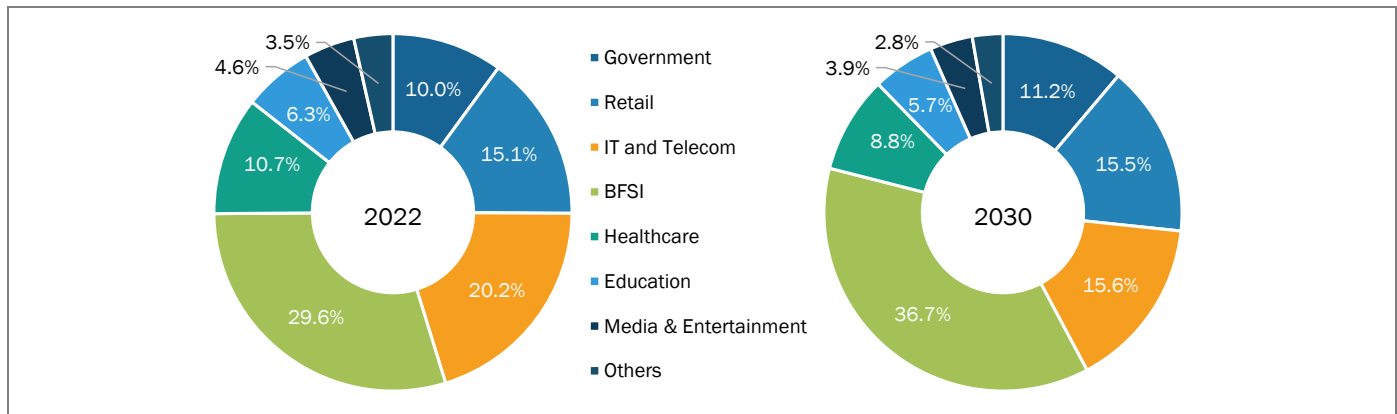


Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

9. Consent Management Market Analysis – End-use Industry

Global consent management market is segmented by end-use industry into retail, government, IT and telecom, BFSI, healthcare, education, media & entertainment, and others. The cloud-based segment held the largest share of the Consent Management market accounting for 29.6% in 2022 and is expected to account for 36.7% in 2030.

Figure 16. Consent Management Market Share (%) – End-use Industry, 2022 and 2030



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

Table 5. Consent Management Market Revenue and Forecasts To 2030 (US\$ Million) – End-use Industry

End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	32.42	38.60	45.98	54.96	66.02	79.88	97.40	119.58	147.30	181.79	225.44	22.0%
Retail	49.73	58.61	69.14	81.83	97.34	116.62	140.81	171.22	208.87	255.30	313.58	20.8%
IT and Telecom	70.89	80.97	92.50	105.94	121.85	141.03	164.37	192.73	226.47	266.35	314.40	16.5%
BFSI	92.70	112.29	136.01	165.16	201.40	247.18	305.54	380.07	474.03	592.04	742.61	23.6%
Healthcare	37.20	42.73	49.10	56.58	65.49	76.32	89.58	105.82	125.33	148.63	177.00	17.4%
Education	21.64	25.08	29.08	33.83	39.55	46.56	55.23	65.97	79.04	94.87	114.41	18.7%
Media and Entertainment	15.75	18.14	20.92	24.19	28.10	32.86	38.72	45.93	54.64	65.09	77.88	17.9%
Others	12.35	14.13	16.16	18.54	21.36	24.77	28.91	33.96	39.98	47.11	55.72	16.7%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 136.01 million in 2022 and is projected to reach US\$ 742.61 million by 2030; it is expected to grow at a CAGR of 23.6% from 2022 to 2030.

9.1 Government

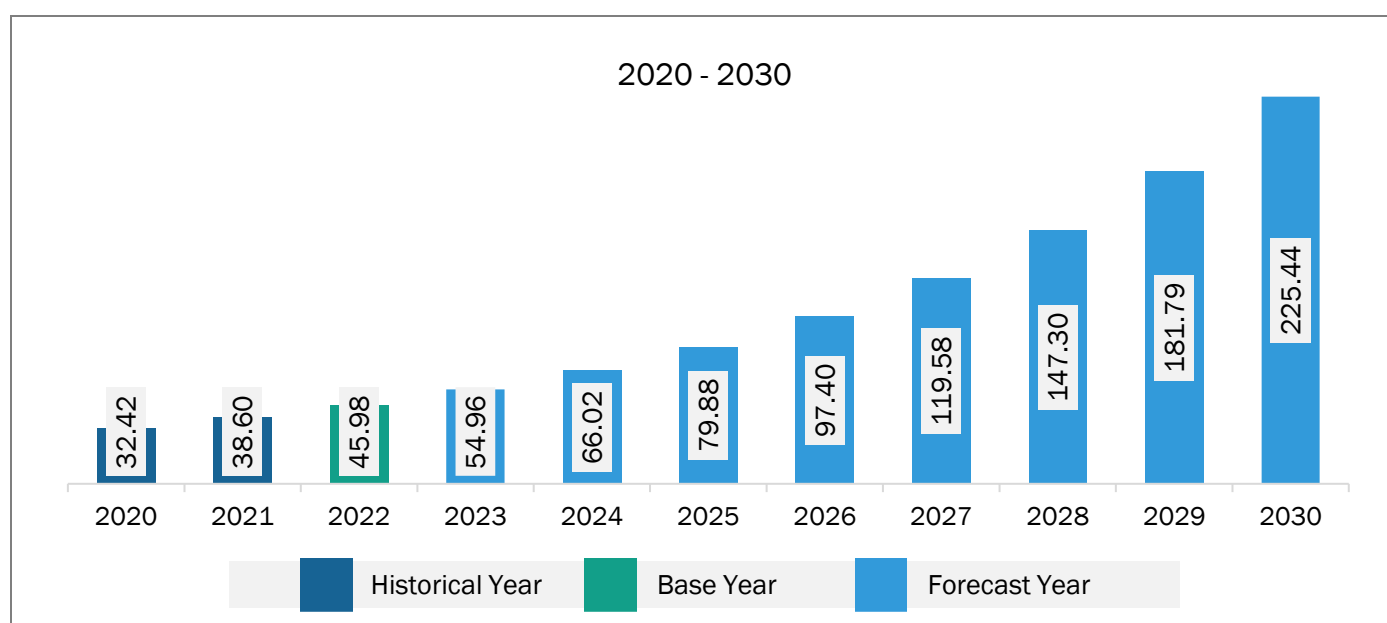
9.1.1 Overview

Government bodies and other regulatory associations take various initiatives to manage the use of personal information through privacy management. The government and regulatory agencies are subjected to proper compliance with data privacy rules. The consent management software provides various facilities to government sectors. It addresses the evolving regulations and solves consent and preference management required by providing virtually unlimited configuration capabilities based on expected use cases, local legislation types, and other mitigating factors. It collects consent at all points of the customer's journey. The government is also responsible for ensuring audit support and risk and compliance management of data for the benefit of individuals. The countries' authorities are subjected to comply with the standards framed by GDPR to safeguard customers' data from getting sold to unauthorized third parties. The government sector is expected to witness significant demand for consent management as the industry handles a massive amount of sensitive data and makes significant investments in data privacy and protection solutions.

9.1.2 Government Market Revenue and Forecasts To 2030 (US\$ Million)

The government segment was valued at US\$ 45.98 million in 2022 and is projected to reach US\$ 225.44 million by 2030; it is expected to grow at a CAGR of 22.0% during the forecast period.

Figure 17. Government Market Revenue and Forecasts To 2030 (US\$ Million)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

9.2 Retail

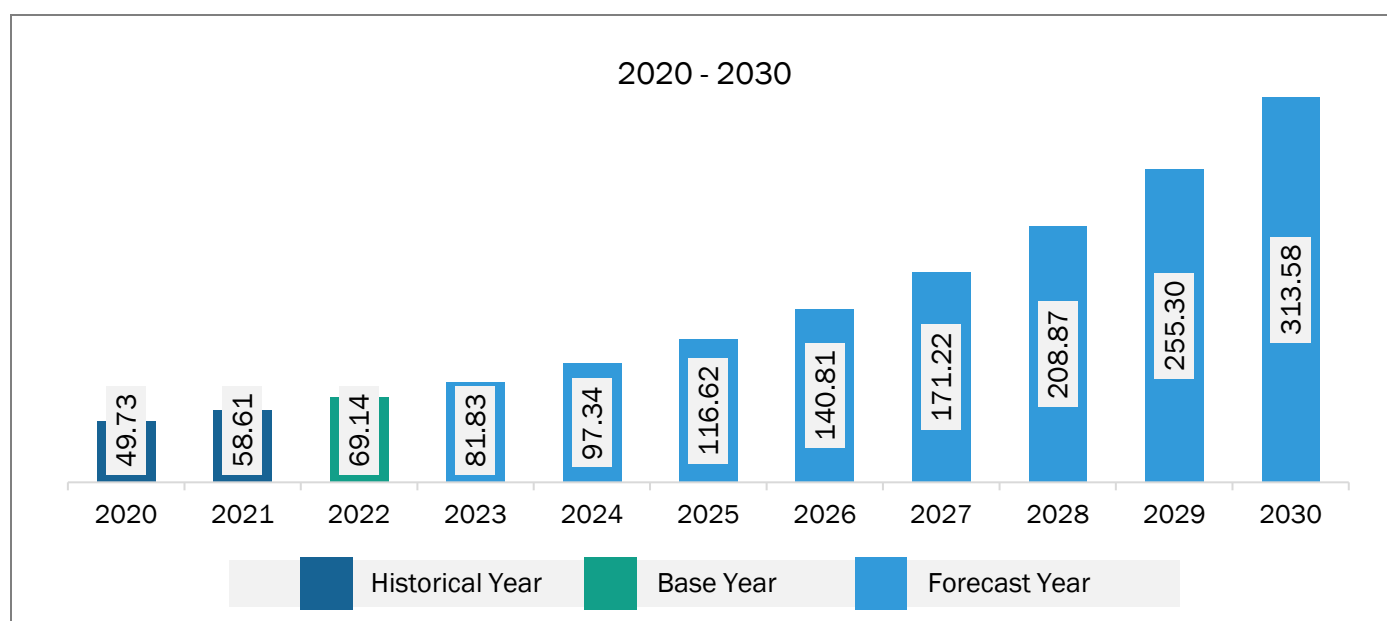
9.2.1 Overview

Retail customers are turning to the most recent consent management systems to ensure compliance with privacy laws and regulations. This is because these platforms make acquiring and managing customer consent simple. Businesses can demonstrate to their customers that they value their privacy and are devoted to developing trusting connections by doing so. Also, with privacy becoming an increasingly crucial aspect in making purchase decisions, consent management solutions are becoming a must-have for any retail firm hoping to flourish. Consent management software brings together all the data the business holds about individuals. With the implementation of GDPR, consent management solution providers have a huge opportunity in the retail sector, especially in the marketing and communication department. The key features of consent management solutions in retail are workflow management, real-time access control, SaaS Admin UI, track and trace for compliance, user-level consent management, and reporting dashboard, among others. As per Onetrust, companies implementing a consent and preference management system are likely to expect a significant return on investment. The expected ROI for consent and preference management in 2022 was slightly more than \$ 46 for every \$ 1.21 spent. Online retail stores also benefit from consent management solutions because they handle third-party banning and reporting—violations and cookie consents. A CMP is in charge of all areas of privacy. Instead, store owners can concentrate on enhancing their operations, product listings, and other revenue-generating activities. Furthermore, the platform protects the website from unauthorized third parties. It accomplishes this by automatically blocking and unblocking third-party scripts.

9.2.2 Retail Market Revenue and Forecasts To 2030 (US\$ Million)

The retail segment was valued at US\$ 69.14 million in 2022 and is projected to reach US\$ 313.58 million by 2030; it is expected to grow at a CAGR of 20.8% during the forecast period.

Figure 18. Retail Market Revenue and Forecasts To 2030 (US\$ Million)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

9.3 IT and Telecom

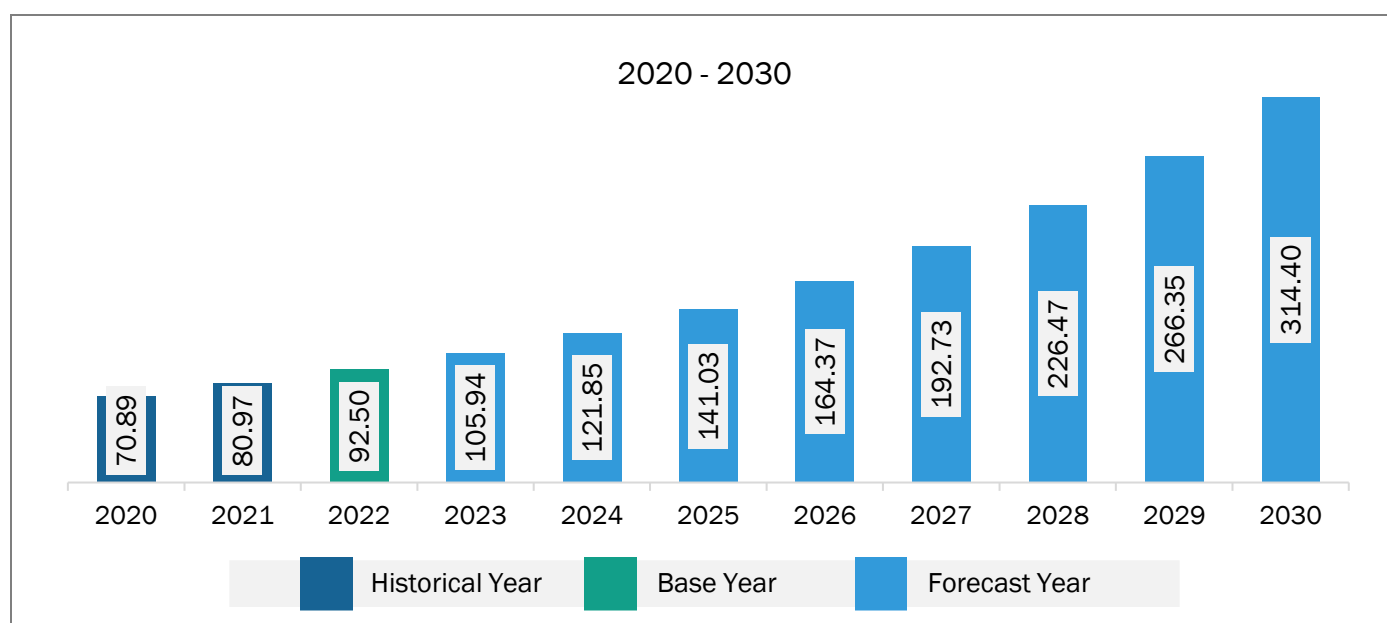
9.3.1 Overview

GDPR highly impacts the IT & telecom industry. The businesses that transfer data for warehousing, marketing purpose, and reporting ensure they store and use consumer information only with explicit consent. The IT & telecommunication industry widely uses digital technology that allows transmission integration, processing, switching, and information recovery. Also, it offers opportunities to combine varied service models into an integrated and complete model. Vivid advancements in devices and material technology caused due to digitalization have also raised a concern about the authenticity and reliability of the information, as this information is highly sensitive and needs to be protected. Therefore, consent management solutions are required in these industries to maintain the privacy of consumers' data. Telecom companies are making huge investments to align their business under GDPR compliance. Various authorities are launching new regulations to keep a check on telecom providers. For instance, in June 2023, the Telecom Regulatory Authority of India (TRAI) launched a digital consent authorization (DCA) platform to speed up the process of obtaining consumer consent on the distributed ledger technology (DLT) platform mandated by the regulator to reduce nuisance calls and messages.

9.3.2 IT and Telecom Market Revenue and Forecasts To 2030 (US\$ Million)

The It and telecom segment was valued at US\$ 92.50 million in 2022 and is projected to reach US\$ 314.40 million by 2030; it is expected to grow at a CAGR of 16.5% during the forecast period.

Figure 19. IT and Telecom Market Revenue and Forecasts To 2030 (US\$ Million)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

9.4 BFSI

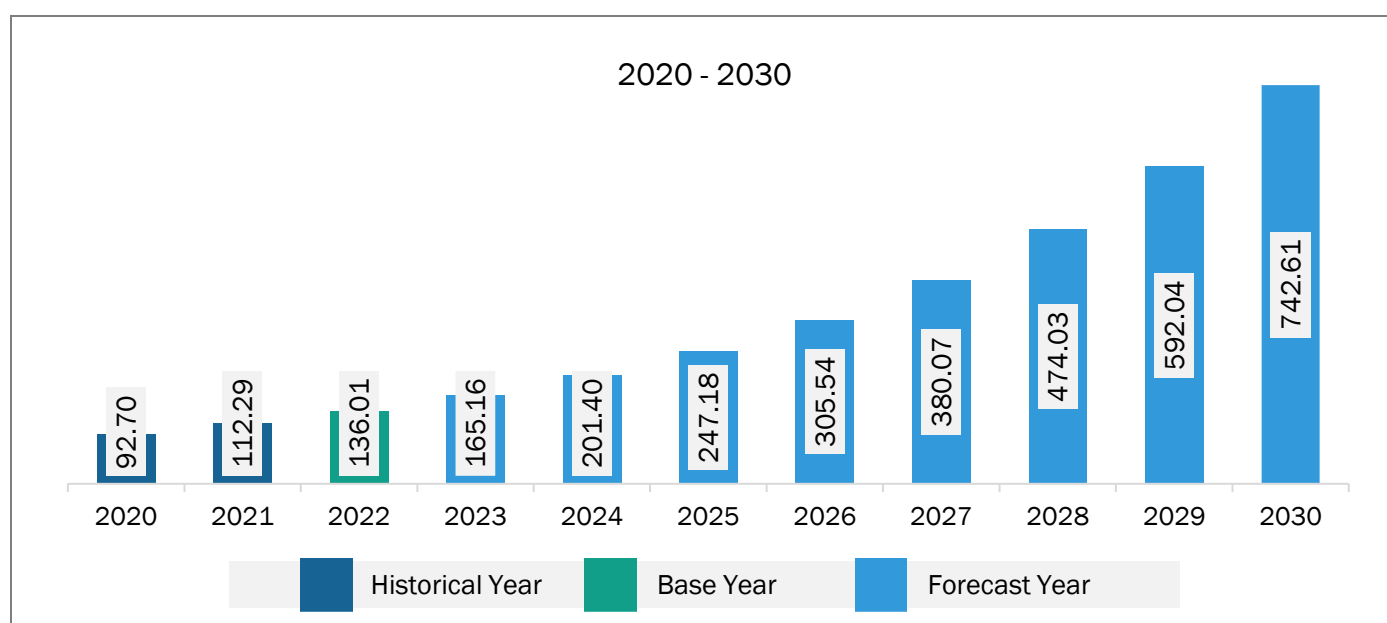
9.4.1 Overview

Financial service providers are rapidly adapting to the enhanced requirements by establishing a robust mechanism to store and secure customer consent. Consent management solution in the financial service sector enables the efficient management of customer preferences on data processing and change in consent settings. The vendor offers inbuilt review processes to ensure continued compliance. Data privacy is a high priority in the financial sector. Banks, financial institutions, and insurance companies manage a massive amount of sensitive and confidential data about their customers. Therefore, the use of consent management software plays a vital role in protecting the data from getting authorized by third parties. Data privacy and data security go hand-in-hand. Without adequate security protocols, it becomes difficult for organizations to secure data against external and internal threats. Banks and financial institutions ensure the proper implementation of smart policies developed to educate and train their staff on common standards, significantly driving the consent management market.

9.4.2 BFSI Market Revenue and Forecasts To 2030 (US\$ Million)

The BFSI segment was valued at US\$ 136.01 million in 2022 and is projected to reach US\$ 742.61 million by 2030; it is expected to grow at a CAGR of 23.6% during the forecast period.

Figure 20. BFSI Market Revenue and Forecasts To 2030 (US\$ Million)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

9.5 Healthcare

9.5.1 Overview

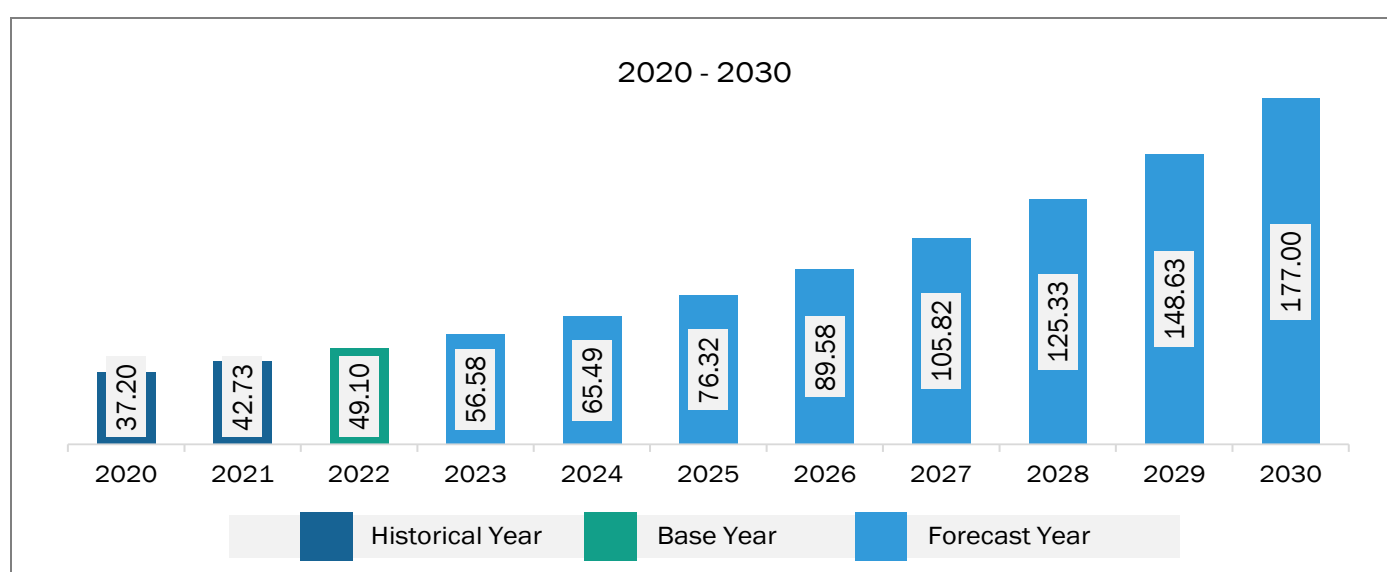
Emerging healthcare privacy policies, healthcare management, and delivery concepts increasingly depend on the bidirectional exchange of patient data. Healthcare data privacy and security remain at the top. Patient consent management capabilities ensure that the organization complies with protection regulations and patient privacy as patients share information across the healthcare network. Vendors offer configurable and unique solutions for managing and capturing patient consent. The features of these comprehensive consent management model are based on strong foundational principles, patent-pending, and offers advanced flexibility to support and implement virtually any governance recommendations or mandates. Consent management solution for healthcare offers standards-based consent management with privacy auditing that balances consumer information privacy with the clinical need to access personal health information. Owing to this, major consent management providers have launched many solutions in recent years. For instance, in 2021, WSO2 Open Healthcare launched a new Consent Management functionality. The entire capability, available with the current edition of WSO2 Open Healthcare, provides an ongoing procedure for provisioning, requesting, collecting, enforcing, and logging activity relevant to patient or member data acquisition and management throughout the relationship. Also, in May 2021, Google Cloud made its Healthcare Consent Management API generally available, allowing healthcare application developers and clinical researchers to easily manage patients' consent for using health data. The Healthcare Consent Management API is part of Google Cloud Platform's (GCP) Cloud Healthcare API offering.

Medable has launched Total Consent, a fully integrated SaaS electronic consent management solution, for all decentralized and hybrid clinical trials in over 120 locations worldwide. This technology can speed up the informed consent process for potential trial subjects by increasing patient accessibility, understanding, and experience. Such developments are further leading to the adoption of consent management solutions in the Healthcare industry.

9.5.2 Healthcare Market Revenue and Forecasts To 2030 (US\$ Million)

The healthcare segment was valued at US\$ 49.10 million in 2022 and is projected to reach US\$ 177.00 million by 2030; it is expected to grow at a CAGR of 17.4% during the forecast period.

Figure 21. Healthcare Market Revenue and Forecasts To 2030 (US\$ Million)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

9.6 Education

9.6.1 Overview

Consent management is becoming increasingly crucial in education as educational institutions acquire and maintain sensitive student data. After the implementation of GDPR, the educational sector has been significantly affected in terms of child consent, subject access request, risk management, ability to prove compliance, and increased accountability.

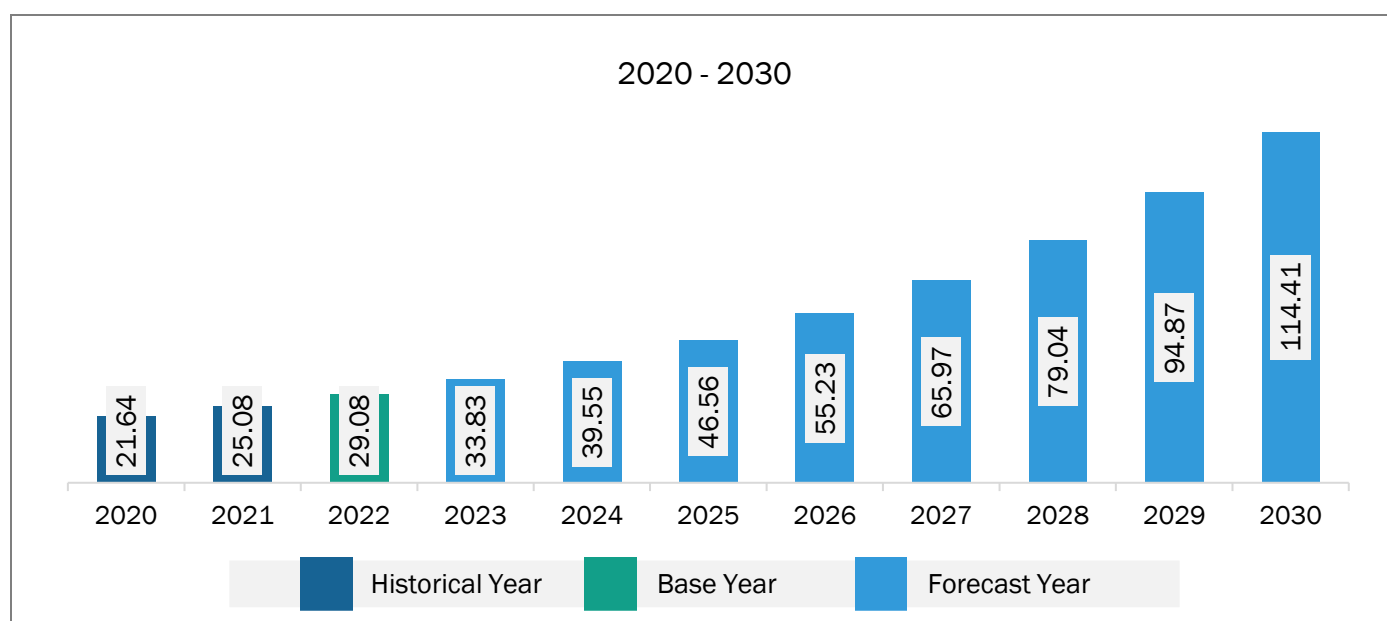
The education sector maintains a significant amount of personal data that falls under the legal basis, i.e., in the public interest. It might not be necessary for organizations to gain specific consent. However, consent must be explicitly given by the students or parents for anything that does not fall under the "in the public interest" category.

The rising number of online education or learning-related platforms is driving the need for obtaining consent for data usage related to digital platforms. Hence, educational institutions are exploring consent management systems to address this requirement, driving the consent management market worldwide.

9.6.2 Education Market Revenue and Forecasts To 2030 (US\$ Million)

The education segment was valued at US\$ 29.08 million in 2022 and is projected to reach US\$ 114.41 million by 2030; it is expected to grow at a CAGR of 18.7% during the forecast period.

Figure 22. Education Market Revenue and Forecasts To 2030 (US\$ Million)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

9.7 Media & Entertainment

9.7.1 Overview

Digitization has brought a complete end-to-end revolution in the media & entertainment sector in the activities that range from how content is produced to distribution and customers interacting and collaborating to create content together. In the search for a seamless experience across various distributed channels, digital transformation has led to the rapid growth of the media & entertainment industry. Social media has played a huge role in the popularity of the social media marketing business. A huge amount of data is available on all the social media platforms, which marketers can use to

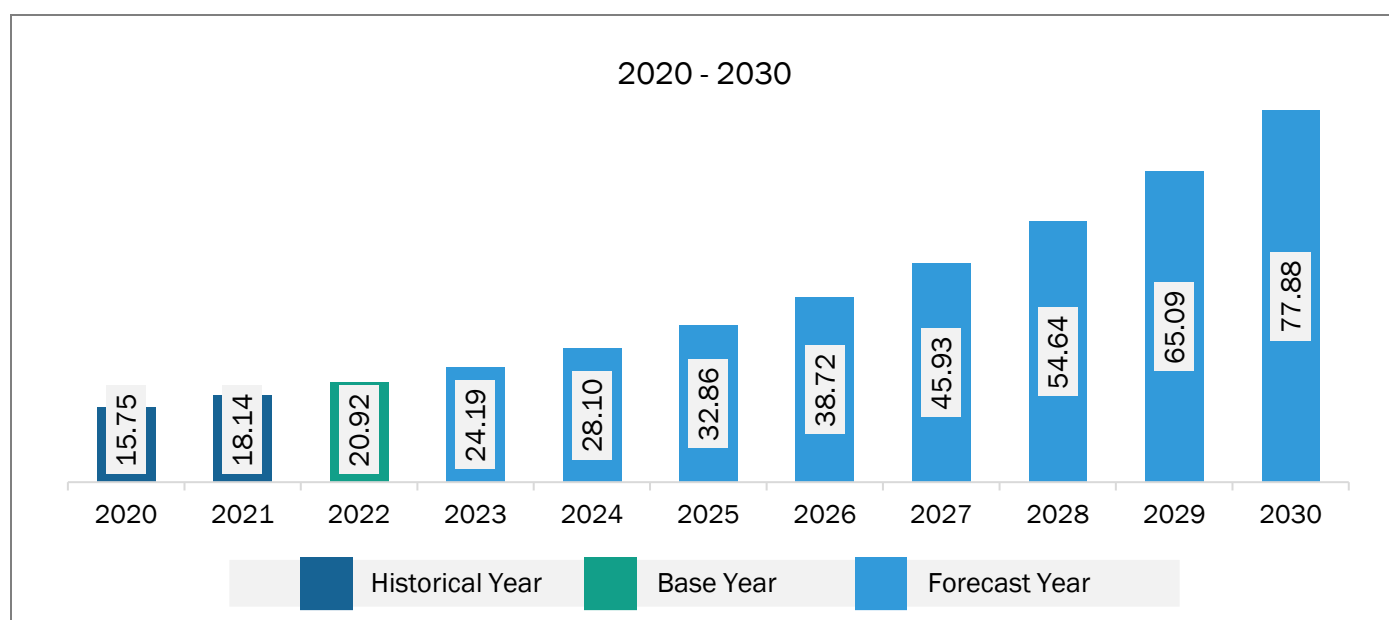
harness a broadened customer base. Marketers use this data to understand their customers better. Social media is a great tool when used appropriately from platforms such as Facebook, Twitter, Instagram, and LinkedIn.

Every major social media platform with users from Europe has to be GDPR-compliant. Social media marketers need to be careful regarding the data they work with. Also, social media marketers need to ensure that their customers have given consent. They must also outline to the customers how their data is being used and why it has been gathered. The data protection act puts certain restrictions on social media marketers and has significantly impacted the business of this industry vertical.

9.7.2 Media & Entertainment Market Revenue and Forecasts To 2030 (US\$ Million)

The media & entertainment segment was valued at US\$ 20.92 million in 2022 and is projected to reach US\$ 77.88 million by 2030; it is expected to grow at a CAGR of 17.9% during the forecast period.

Figure 23. Media & Entertainment Market Revenue and Forecasts To 2030 (US\$ Million)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

9.8 Others

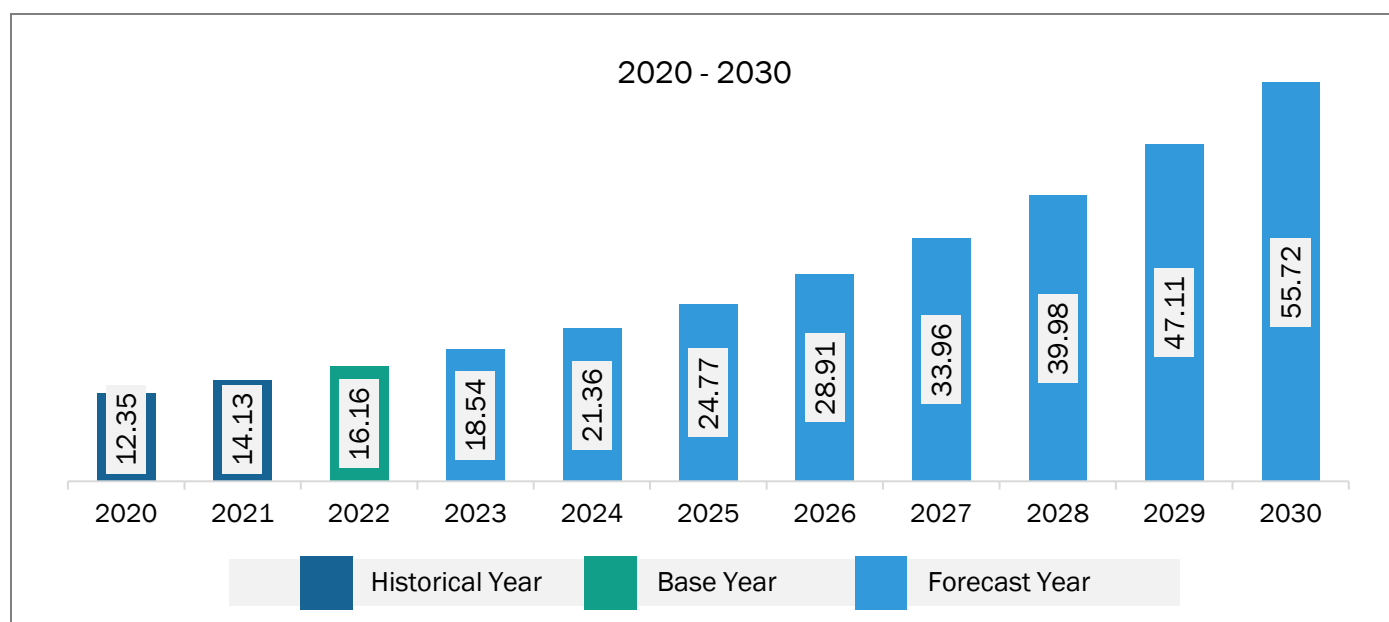
9.8.1 Overview

The others segment includes transportation & logistics and food & beverages sectors. With the implementation of GDPR, these sectors are mandated to safeguard and manage the customers personal data. Logistic sector particularly is involved in huge data transactions on regular basis, hence in order to refrain from any fines or penalties from GDPR the market players in logistics industry are adopting consent management solutions at a significant pace. Further, Due to the increasing regulations and standards globally, these sectors are expected to make significant investments in consent management solutions during the forecast period.

9.8.2 Others Market Revenue and Forecasts To 2030 (US\$ Million)

The others segment was valued at US\$ 16.16 million in 2022 and is projected to reach US\$ 55.72 million by 2030; it is expected to grow at a CAGR of 16.7% during the forecast period.

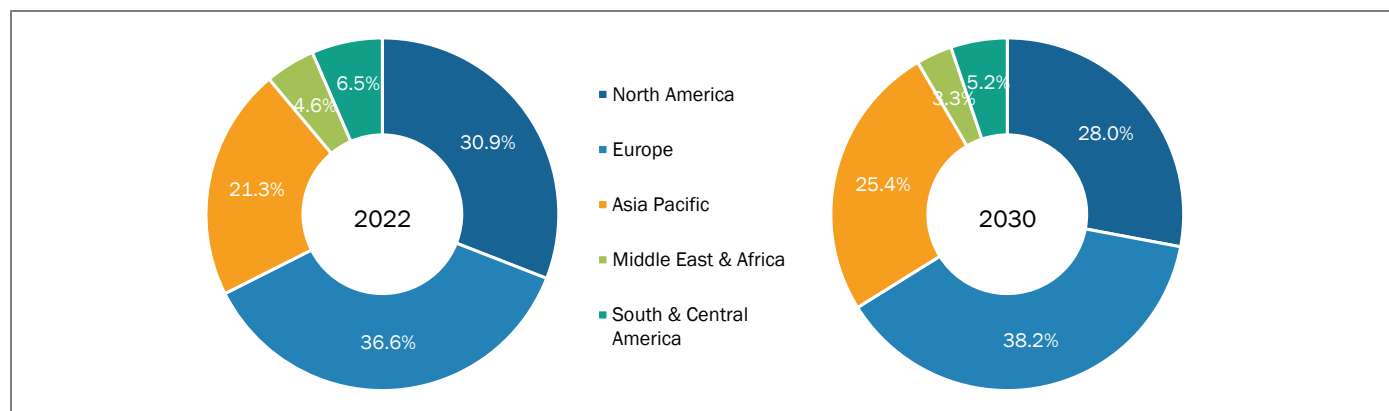
Figure 24. Others Market Revenue and Forecasts To 2030 (US\$ Million)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

10. Consent Management Market - Geographical Analysis

Figure 25. Consent Management Market Revenue Share, By Region (2022 & 2030)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

Europe dominated the consent management market in 2022 with a share of 36.6%; it would continue to dominate the market during the forecast period and account for 38.2% share by 2030. North America is the second-largest contributor to the global consent management market, followed by Asia Pacific.

10.1 North America

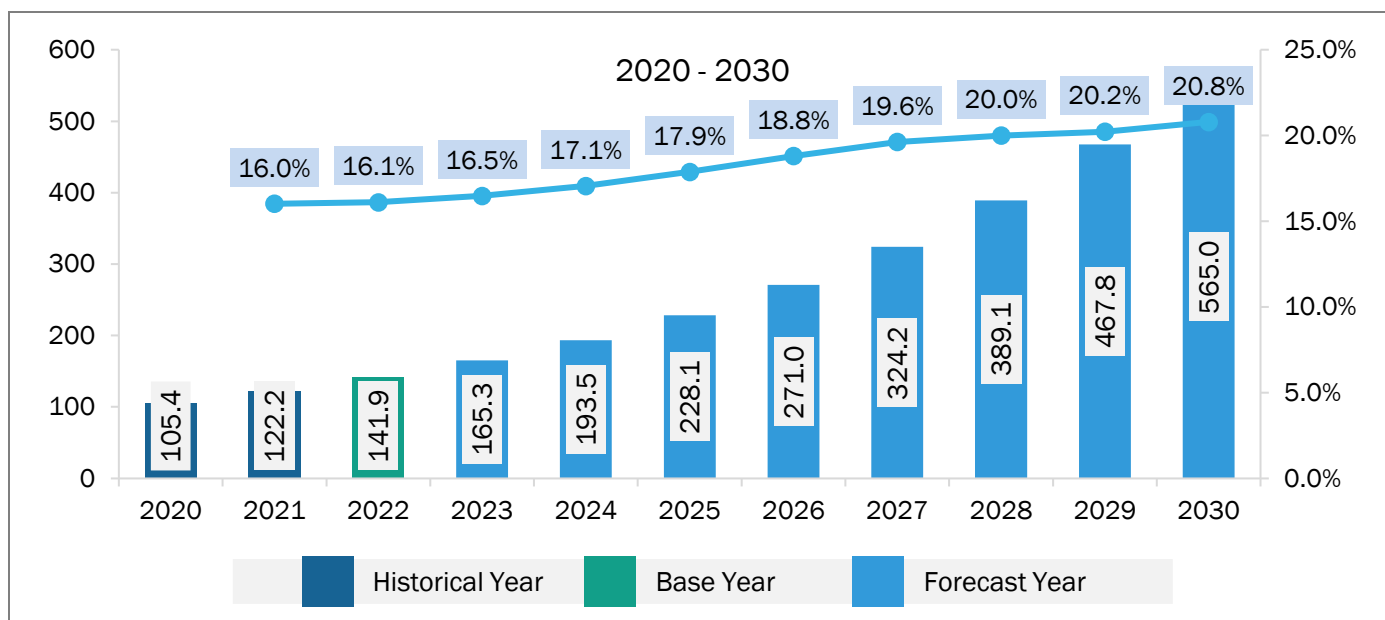
10.1.1 North America Consent Management Market Overview

The North America consent management market is segmented into US, Canada, and Mexico. The region is a hub of technological developments that comply with economically robust countries; as a result, there is increased concern among internet users regarding their online safety and consent. This is mainly attributed to the region's ability to remain digitally advanced with customer-centric businesses. Also, as the service sector dominates the market, consumer data is the most crucial asset of the majority of businesses. Various US states have passed legislation and introduced several regulatory policies to protect people's information. In January 2020, the California Consumer Privacy Act (CCPA) came into effect; it was designed to protect the data privacy rights of citizens and force companies to provide all the additional information to consumers regarding the way their data is being collected, stored, and used. This act also helps to provide consumers with more transparency and control over their private data. Due to such regulation by governments of various countries in the region, several companies in retail, healthcare, IT, education, and other industries are raising the demand for technologically advanced consent management solutions. To cater to this rising demand, various market players in the region are launching new solutions. For instance, in July 2022, Didomi launched a Consent Management Platform (CMP) and Preference Management Platform (PMP) in North America. The company's technology suite is purpose-built to meet the consent-based privacy and preference needs of various enterprises across the region. Furthermore, companies are focusing on inorganic strategies such as partnership and collaboration to provide more efficient solutions to their customers. In February 2022, PossibleNOW announced a strategic partnership with TrustArc. Through this partnership, PossibleNOW can extend its offerings with specific privacy capabilities for enterprise customers, such as data subject requests and cookie consent. Hence, strict government policies and innovations by key players are expected to fuel the growth of the consent management market in North America during the forecast period.

10.1.2 North America Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Consent management market accounted for US\$ 141.93 million in the year 2022 and it is expected to grow at a CAGR of 18.9% during the forecast period 2023 - 2030, to reach US\$ 565.03 million in the year 2030.

Figure 26. Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)

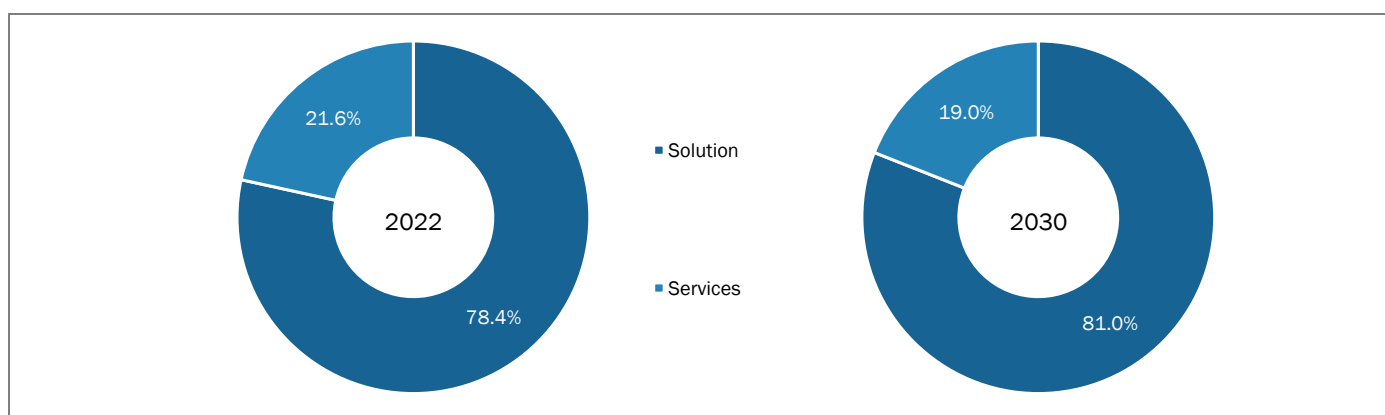


Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

10.1.3 North America Consent Management Market Breakdown by Component

The consent management market is dominated by the solution segment, which accounted to 78.4% in 2022 and is estimated to account for 81.0% market revenue share by 2030.

Figure 27. Consent Management Market Breakdown by Component (2022 and 2030)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

10.1.3.1 North America Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Table 6. North America Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	81.95	95.47	111.30	130.18	153.00	181.10	216.02	259.46	312.60	377.33	457.62	19.3%
Services	23.41	26.77	30.63	35.15	40.53	47.04	55.02	64.77	76.47	90.43	107.41	17.0%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 111.30 million in 2022 and is projected to reach US\$ 457.62 million by 2030; it is expected to grow at a CAGR of 19.3% from 2022 to 2030.

Table 7. North America Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	51.54	60.30	70.60	82.93	97.90	116.37	139.41	168.15	203.46	246.62	300.36	19.8%
Cookie Management	30.42	35.17	40.70	47.24	55.10	64.73	76.61	91.30	109.14	130.70	157.26	18.4%

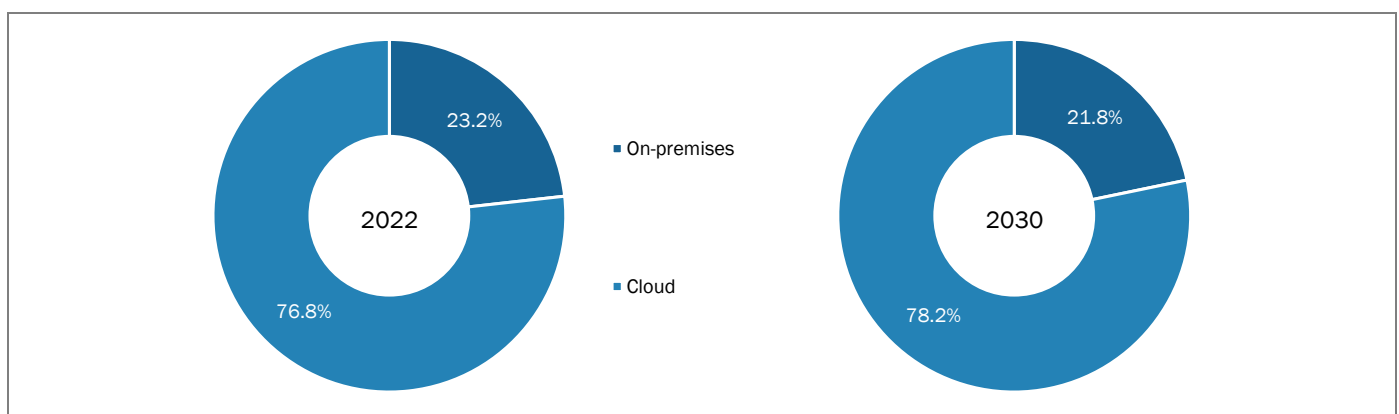
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 70.60 million in 2022 and is projected to reach US\$ 300.36 million by 2030; it is expected to grow at a CAGR of 19.8% from 2022 to 2030.

10.1.4 North America Consent Management Market Breakdown by Deployment

The consent management market was dominated by the cloud-based segment, which accounted to 76.8% in 2022 and is estimated to account for 78.2% market revenue share by 2030.

Figure 28. Consent Management market Breakdown by Deployment, 2022 and 2030 (%)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

10.1.4.1 North America Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Table 8. North America Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	24.87	28.62	32.97	38.10	44.24	51.74	60.96	72.33	86.08	102.62	122.92	17.9%
Cloud-based	80.50	93.62	108.96	127.22	149.28	176.40	210.08	251.90	303.00	365.14	442.11	19.1%

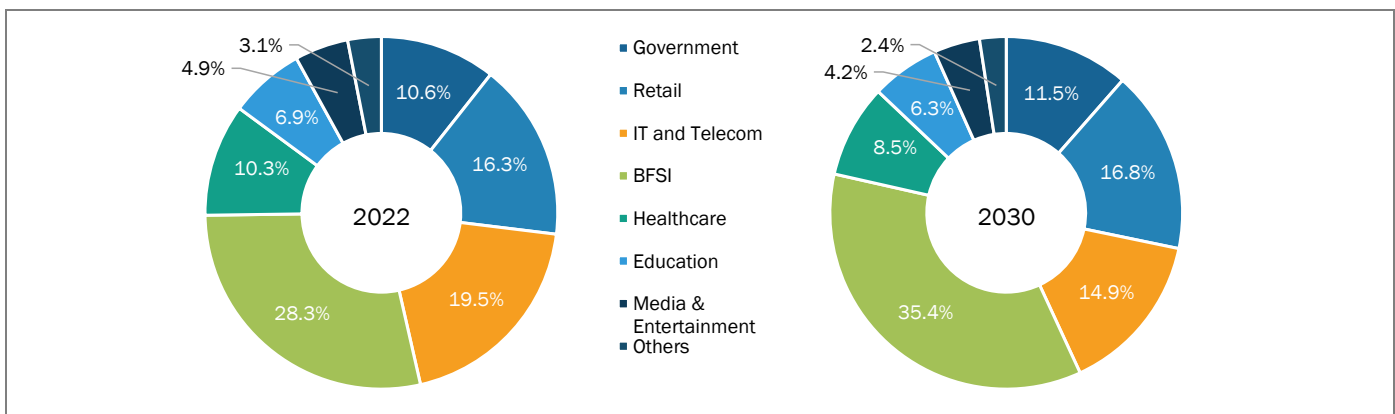
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 108.96 million in 2022 and is projected to reach US\$ 442.11 million by 2030; it is expected to grow at a CAGR of 19.1% from 2022 to 2030.

10.1.5 North America Consent Management Market Breakdown by End-use Industry

The consent management market was dominated by the BFSI segment, which accounted to 28.3% in 2022 and is estimated to account for 35.4% market revenue share by 2030.

Figure 29. Consent Management market Breakdown by End-use Industry, 2022 and 2030 (%)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

10.1.5.1 North America Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

Table 9. North America Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	10.99	12.88	15.10	17.76	20.99	24.98	29.96	36.17	43.80	53.14	64.78	20.0%
Retail	17.05	19.85	23.14	27.05	31.79	37.61	44.85	53.85	64.86	78.27	94.89	19.3%
IT and Telecom	21.76	24.53	27.66	31.27	35.48	40.51	46.56	53.81	62.33	72.22	83.97	14.9%
BFSI	28.00	33.57	40.23	48.33	58.28	70.72	86.42	106.24	130.93	161.54	200.13	22.2%
Healthcare	11.34	12.88	14.64	16.69	19.10	22.01	25.55	29.84	34.94	40.97	48.23	16.1%
Education	7.44	8.53	9.79	11.27	13.04	15.19	17.82	21.06	24.96	29.62	35.33	17.4%
Media and Entertainment	5.37	6.13	6.99	8.00	9.20	10.65	12.42	14.58	17.16	20.23	23.95	16.6%
Others	3.41	3.86	4.36	4.95	5.64	6.47	7.47	8.67	10.10	11.77	13.76	15.4%

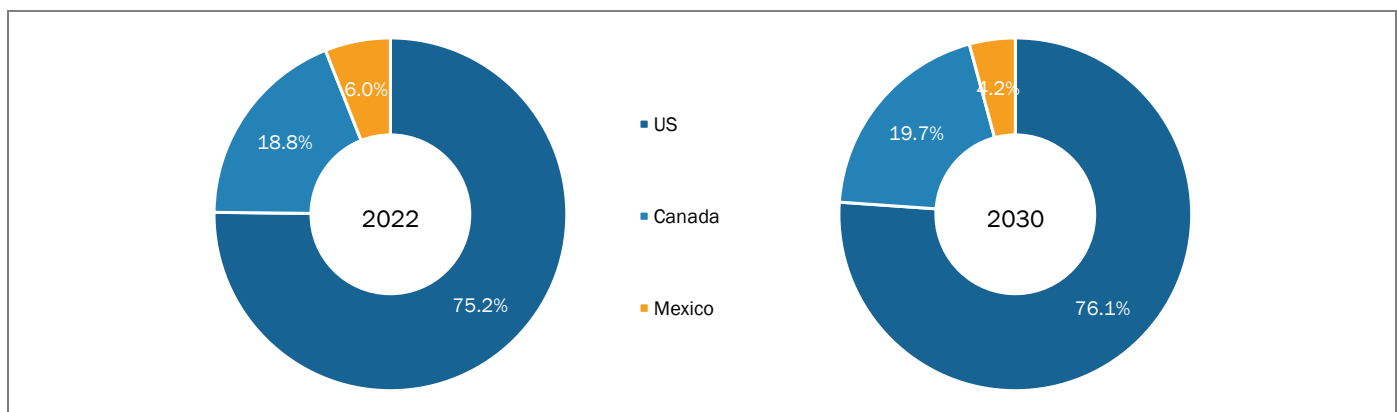
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 40.23 million in 2022 and is projected to reach US\$ 200.13 million by 2030; it is expected to grow at a CAGR of 22.2% from 2022 to 2030.

10.1.6 North America Consent Management Market Revenue and Forecasts and Analysis - By Countries

The consent management market was dominated by the US, which accounted to 75.2% in 2022 and is estimated to account for 76.1% market revenue share by 2030. For the years 2022 to 2030, the consent management market based on key countries in North America region is shown in the figure provided below:

Figure 30. Consent Management market Breakdown by Key Countries, 2022 and 2030 (%)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

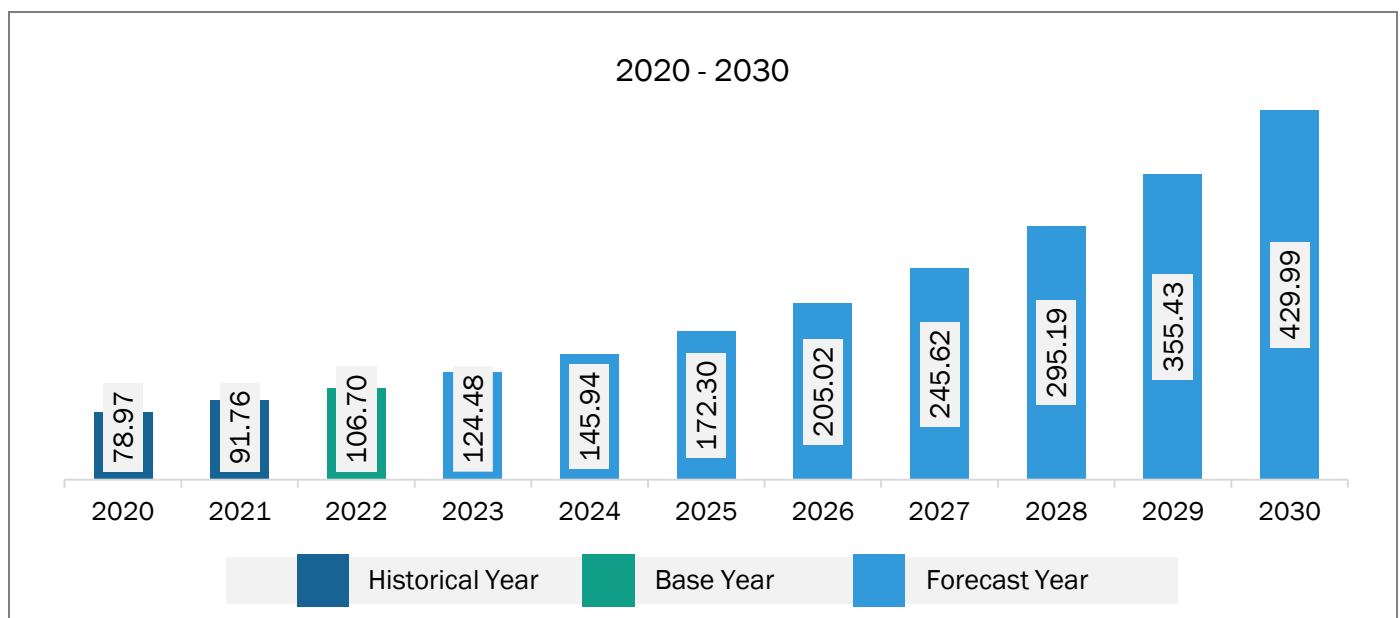
Table 10. North America Consent Management Market, by Country – Revenue and Forecast to 2030 (USD Million)

Country	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
United States	78.97	91.76	106.70	124.48	145.94	172.30	205.02	245.62	295.19	355.43	429.99	19.0%
Canada	19.60	22.87	26.71	31.30	36.85	43.69	52.20	62.80	75.79	91.63	111.31	19.5%
Mexico	6.80	7.61	8.52	9.55	10.74	12.15	13.82	15.81	18.09	20.70	23.73	13.7%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market in United States was worth US\$ 106.70 million in 2022 and is projected to reach US\$ 429.99 million by 2030; it is expected to grow at a CAGR of 19.0% from 2022 to 2030. The market in Canada is estimated to be worth US\$ 111.31 million by 2030 and is expected to grow at a CAGR of 19.5% during the 2022 - 2030 period.

10.1.6.1 US Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 31. US Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in the US was valued at US\$ 106.70 million in 2022 and is projected to reach US\$ 429.99 million by 2030; it is expected to grow at a CAGR of 19.0% during the forecast period.

The US has various federal and state laws that cover different aspects of data privacy, such as health data and financial information. Various US states have passed legislation and introduced several regulatory policies to protect people's information. In January 2020, the California Consumer Privacy Act (CCPA) came into effect; it was designed to protect the data privacy rights of citizens and force companies to provide all the additional information to consumers regarding the way their data is being collected, stored, and used. This act also helps to provide consumers with more transparency and control over their private data. In addition, the Federal Trade Commission Act (FTC Act) (15 US Code 41 et seq.) allows more access to the authority of the US Federal Trade Commission (FTC) and take enforcement actions, such as federal privacy and data protection regulations, to protect consumers from unfair or deceptive practices. According to the FTC,

"deceptive practices" include a company's inability to comply with its advertised privacy claims and failure to ensure proper security of personal information, coupled with the use of deceptive advertising or marketing strategies.

Moreover, the constant rise in data breach incidents is increasing the importance of consent management solutions in the US. For instance, in March 2022, hackers were able to access the Ronin crypto "bridge" and stole more than US\$ 600 million from the site, which allowed customers to exchange different types of digital currency. The hackers (a renowned North Korean hacker outfit known as Lazarus) created a fake job offer on LinkedIn to an engineer allowing the attackers to gain access to the network via a spyware-infected PDF document. As the privacy concern among the US consumer has been increasing at an unprecedented rate, the companies catering to the US market or operating in the country are strictly abiding by the regulations. Thus, such incidents are increasing the demand for consent management solutions, which is driving the market in the country.

10.1.6.1.1 US Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on component in the US is shown in the table provided below:

Table 11. US Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	61.82	72.13	84.22	98.65	116.12	137.66	164.45	197.81	238.68	288.53	350.44	19.5%
Services	17.15	19.63	22.48	25.83	29.81	34.65	40.57	47.81	56.51	66.90	79.55	17.1%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 84.22 million in 2022 and is projected to reach US\$ 350.44 million by 2030; it is expected to grow at a CAGR of 19.5% from 2022 to 2030.

Table 12. US Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	38.85	45.53	53.40	62.83	74.28	88.43	106.11	128.18	155.33	188.57	230.01	20.0%
Cookie Management	22.97	26.60	30.82	35.82	41.85	49.22	58.34	69.63	83.35	99.96	120.43	18.6%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 53.40 million in 2022 and is projected to reach US\$ 230.01 million by 2030; it is expected to grow at a CAGR of 20.0% from 2022 to 2030.

10.1.6.1.2 US Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in the US is shown in the table provided below.

Table 13. US Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	18.48	21.29	24.54	28.38	32.98	38.60	45.51	54.04	64.35	76.77	92.02	18.0%
Cloud-based	60.49	70.47	82.16	96.10	112.96	133.71	159.50	191.58	230.84	278.65	337.97	19.3%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 82.16 million in 2022 and is projected to reach US\$ 337.97 million by 2030; it is expected to grow at a CAGR of 19.3% from 2022 to 2030.

10.1.6.1.3 US Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in the US is shown in the table provided below.

Table 14. US Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

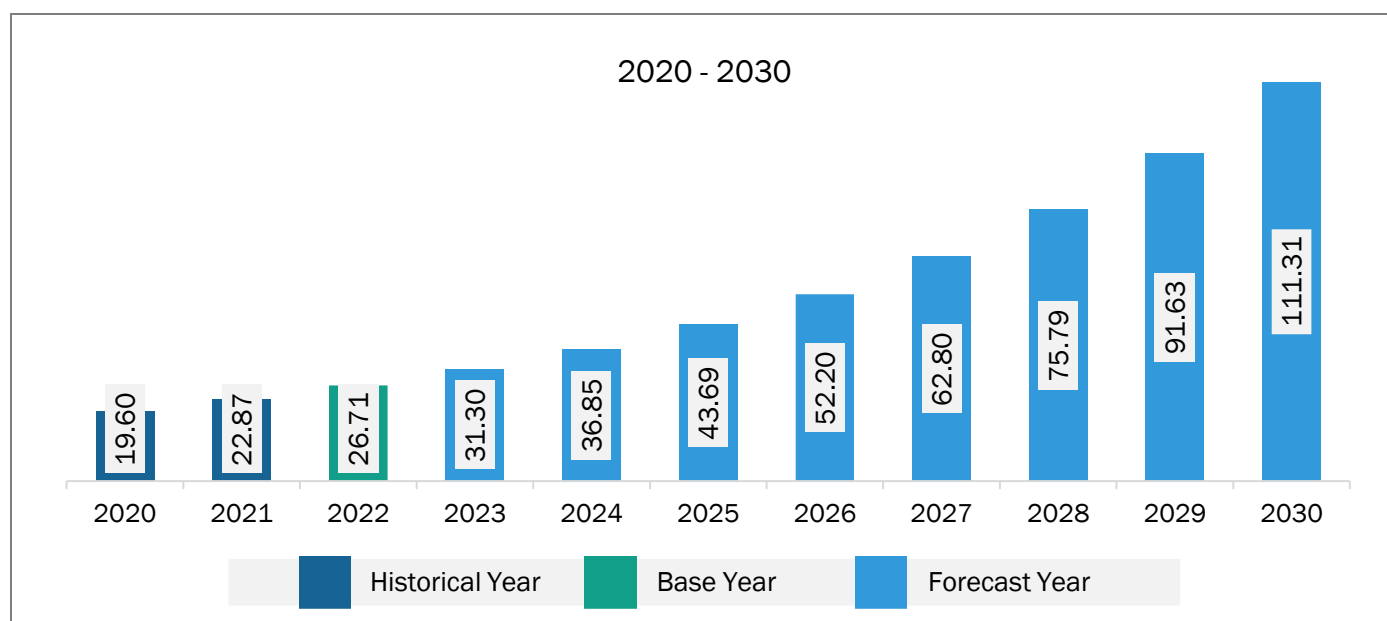
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	8.18	9.60	11.28	13.29	15.73	18.75	22.52	27.24	33.04	40.16	49.03	20.2%
Retail	12.83	14.96	17.46	20.45	24.06	28.51	34.05	40.94	49.39	59.68	72.46	19.5%
IT and Telecom	16.24	18.34	20.71	23.44	26.64	30.46	35.05	40.58	47.06	54.61	63.58	15.1%
BFSI	20.90	25.10	30.14	36.26	43.80	53.24	65.16	80.24	99.05	122.41	151.90	22.4%
Healthcare	8.54	9.72	11.06	12.63	14.48	16.71	19.42	22.72	26.64	31.29	36.89	16.2%
Education	5.63	6.46	7.43	8.56	9.92	11.57	13.60	16.09	19.09	22.70	27.11	17.6%
Media and Entertainment	4.07	4.65	5.32	6.10	7.02	8.14	9.51	11.18	13.18	15.56	18.45	16.8%
Others	2.58	2.92	3.31	3.76	4.29	4.93	5.70	6.63	7.73	9.03	10.58	15.6%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 30.14 million in 2022 and is projected to reach US\$ 151.90 million by 2030; it is expected to grow at a CAGR of 22.4% from 2022 to 2030.

10.1.6.2 Canada Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 32. Canada Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in Canada was valued at US\$ 26.71 million in 2022 and is projected to reach US\$ 111.31 million by 2030; it is expected to grow at a CAGR of 19.5% during the forecast period.

In Canada, there is a continuous development in amended and redrafted privacy laws; thus, the demand for enhanced transparency and accountability, as well as the need for increased control over individual consent to use personal data, has increased. Privacy and consent frameworks of the future must be secure, nuanced, interoperable across borders, and scalable. In Canada, under the Personal Information Protection and Electronic Documents Act (PIPEDA), organizations must obtain meaningful consent for collecting, using, and disclosing personal data. Consent is considered meaningful when individuals are given a clear explanation of what organizations are doing with their information. However, there are many exceptions to expressed consent under the current PIPEDA law, where the implied consent (or an opt-out) model often acts as the default.

Moreover, according to a survey by Cyberland, in 2022 security breaches have increased by 20% compared to 2019 stats; this means that in every 11th second, one ransomware attack takes place in Canada. However, the country ranks 13th in the list of countries in terms of the efficiency of their cybersecurity strategy, yet the cyber security breaches continue to increase every year. For instance, 85% of Canadian companies were affected by cyber criminals in 2021, with a 7% increase compared to 2020.

As the average cost of a data breach for Canadian companies is US\$ 4.08 million, both businesses and government take several measures to strengthen the cybersecurity on an organizational and national level. For instance, a Canadian company spends, on average, 11.1% of its IT budget on security. Also, the government keeps issuing new legislation, such as PIPEDA (Personal Information Protection and Electronic Documents Act) and amendments to the current regulations, in order to regulate the way companies handle customer- and business-related data.

10.1.6.2.1 Canada Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in Canada is shown in the table provided below:

Table 15. Canada Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	14.99	17.57	20.61	24.24	28.66	34.12	40.94	49.45	59.92	72.74	88.71	20.0%
Services	4.60	5.30	6.10	7.05	8.18	9.56	11.26	13.35	15.87	18.89	22.60	17.8%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 20.61 million in 2022 and is projected to reach US\$ 88.71 million by 2030; it is expected to grow at a CAGR of 20.0% from 2022 to 2030.

Table 16. Canada Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	9.40	11.07	13.04	15.40	18.29	21.87	26.35	31.97	38.91	47.43	58.10	20.5%
Cookie Management	5.59	6.51	7.57	8.84	10.37	12.25	14.59	17.48	21.02	25.31	30.62	19.1%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 13.04 million in 2022 and is projected to reach US\$ 58.10 million by 2030; it is expected to grow at a CAGR of 20.5% from 2022 to 2030.

10.1.6.2.2 Canada Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in Canada is shown in the table provided below:

Table 17. Canada Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	4.72	5.48	6.37	7.43	8.70	10.27	12.20	14.61	17.54	21.09	25.49	18.9%
Cloud-based	14.87	17.39	20.34	23.87	28.14	33.42	40.00	48.20	58.25	70.54	85.82	19.7%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 20.34 million in 2022 and is projected to reach US\$ 85.82 million by 2030; it is expected to grow at a CAGR of 19.7% from 2022 to 2030.

10.1.6.2.3 Canada Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in Canada is shown in the table provided below:

Table 18. Canada Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

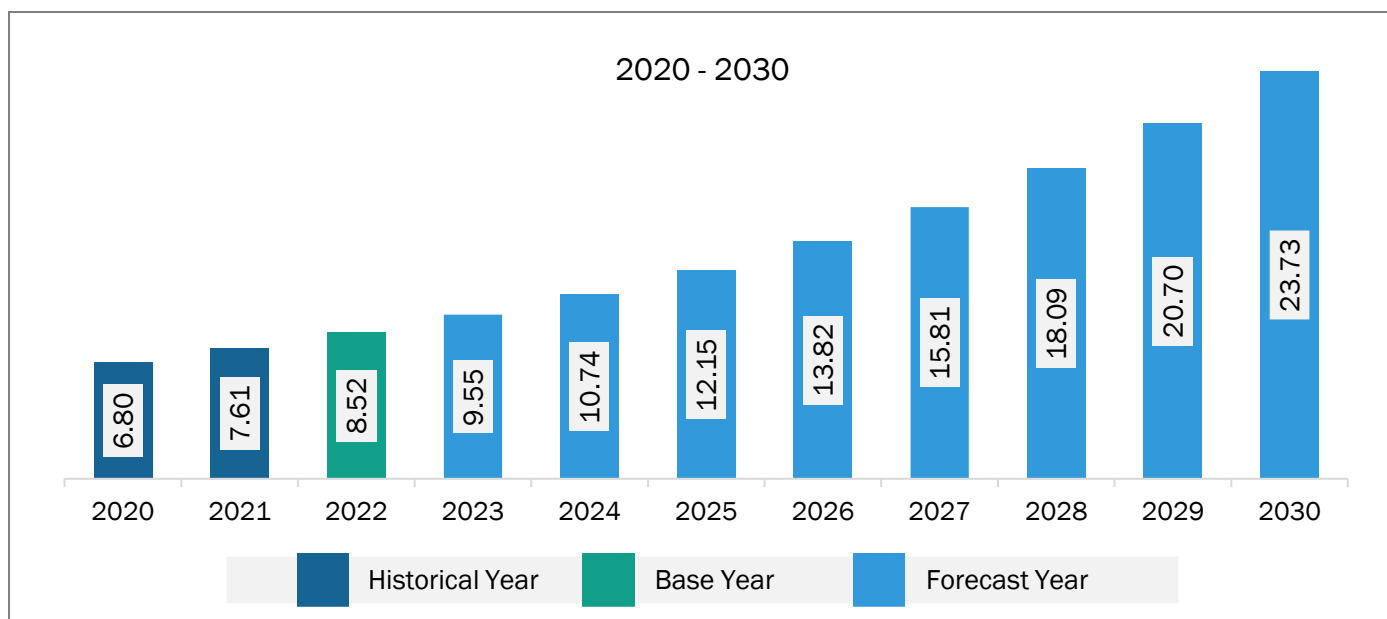
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	2.07	2.44	2.87	3.40	4.04	4.84	5.83	7.08	8.63	10.53	12.90	20.7%
Retail	3.14	3.68	4.31	5.07	5.99	7.13	8.56	10.33	12.51	15.19	18.51	20.0%
IT and Telecom	4.09	4.64	5.26	5.98	6.83	7.84	9.07	10.55	12.29	14.34	16.77	15.6%
BFSI	5.25	6.33	7.63	9.21	11.17	13.63	16.75	20.71	25.67	31.84	39.67	22.9%
Healthcare	2.10	2.40	2.74	3.14	3.62	4.19	4.89	5.74	6.76	7.97	9.43	16.7%
Education	1.36	1.57	1.82	2.10	2.45	2.86	3.38	4.01	4.78	5.71	6.84	18.0%
Media and Entertainment	0.97	1.11	1.28	1.47	1.70	1.98	2.32	2.73	3.23	3.83	4.55	17.2%
Others	0.62	0.71	0.80	0.92	1.05	1.21	1.40	1.64	1.92	2.24	2.64	16.0%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 7.63 million in 2022 and is projected to reach US\$ 39.67 million by 2030; it is expected to grow at a CAGR of 22.9% from 2022 to 2030.

10.1.6.3 Mexico Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 33. Mexico Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in Mexico was valued at US\$ 8.52 million in 2022 and is projected to reach US\$ 23.73 million by 2030; it is expected to grow at a CAGR of 13.7% during the forecast period.

In the last two decades, data breaches have become a real threat to the citizens of Mexico. The Federal Law on the Protection of Personal Data held by Private Parties was approved by the Mexican Congress and has been effective since July 6, 2010. The regulation applies to private individuals and legal entities that are engaged in processing data on the Mexican territory. A large number of companies from various industries, including retail, insurance, and travel, are subject to the law and must abide by it. The Mexican regulatory body is authorized to conduct on-site inspections and control the organization's facilities to ensure compliance with the law.

Further, the threat of data breaching is increasing rapidly in Mexico. For instance, in January 2022, the Mexican government announced that it suffered a major cyber hack of data held by the armed forces, including hospital and health details about the heart condition of the country's President. Additionally, in October 2022, hackers infiltrated the Mexican Defense Ministry, publishing millions of emails that detail the military's growing influence over the civilian government. Therefore, the increasing threat of data breaching and the emerging laws associated with data privacy is fueling the growth of the consent management market in Mexico.

10.1.6.3.1 Mexico Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in Canada is shown in the table provided below:

Table 19. Mexico Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	5.14	5.77	6.48	7.28	8.21	9.32	10.63	12.19	14.00	16.06	18.46	14.0%
Services	1.66	1.84	2.04	2.27	2.53	2.83	3.19	3.61	4.10	4.64	5.27	12.6%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 6.48 million in 2022 and is projected to reach US\$ 18.46 million by 2030; it is expected to grow at a CAGR of 14.0% from 2022 to 2030.

Table 20. Mexico Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	3.28	3.70	4.17	4.70	5.33	6.07	6.95	8.00	9.22	10.62	12.25	14.4%
Cookie Management	1.86	2.07	2.31	2.58	2.89	3.25	3.68	4.19	4.78	5.44	6.21	13.2%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 4.17 million in 2022 and is projected to reach US\$ 12.25 million by 2030; it is expected to grow at a CAGR of 14.4% from 2022 to 2030.

10.1.6.3.2 Mexico Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in Canada is shown in the table provided below:

Table 21. Mexico Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	1.66	1.85	2.06	2.29	2.56	2.87	3.25	3.68	4.19	4.75	5.41	12.8%
Cloud-based	5.13	5.76	6.46	7.26	8.18	9.28	10.58	12.12	13.91	15.94	18.32	13.9%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 6.46 million in 2022 and is projected to reach US\$ 18.32 million by 2030; it is expected to grow at a CAGR of 13.9% from 2022 to 2030.

10.1.6.3.3 Mexico Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in Canada is shown in the table provided below:

Table 22. Mexico Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	0.74	0.84	0.95	1.07	1.22	1.39	1.60	1.84	2.13	2.46	2.84	14.7%
Retail	1.08	1.21	1.36	1.53	1.73	1.97	2.24	2.58	2.96	3.40	3.91	14.1%
IT and Telecom	1.43	1.56	1.69	1.84	2.01	2.21	2.43	2.69	2.97	3.28	3.62	10.0%
BFSI	1.85	2.14	2.47	2.85	3.31	3.85	4.50	5.28	6.21	7.29	8.56	16.8%
Healthcare	0.70	0.77	0.84	0.92	1.01	1.12	1.24	1.38	1.54	1.72	1.91	10.9%
Education	0.45	0.50	0.55	0.61	0.68	0.76	0.85	0.96	1.08	1.22	1.38	12.2%
Media and Entertainment	0.33	0.36	0.40	0.44	0.48	0.54	0.60	0.67	0.75	0.84	0.95	11.4%
Others	0.21	0.23	0.25	0.27	0.30	0.33	0.36	0.40	0.45	0.49	0.55	10.2%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 2.47 million in 2022 and is projected to reach US\$ 8.56 million by 2030; it is expected to grow at a CAGR of 16.8% from 2022 to 2030.

10.2 Europe

10.2.1 Europe Consent Management Market Overview

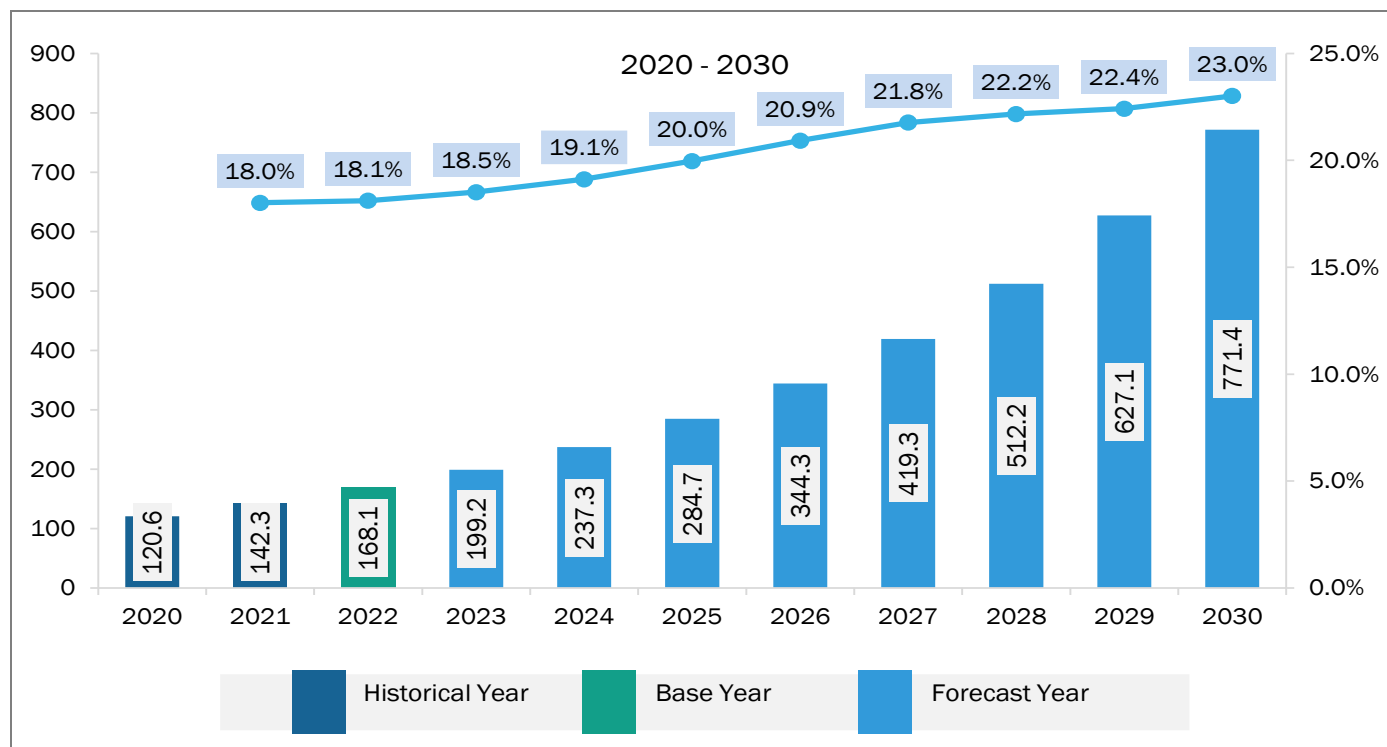
The Europe consent management market is segmented into Germany, France, Italy, the UK, Russia, and the Rest of Europe. Various companies in the region witnessed several data breach activities. For example, in February 2020, Logbox, a UK credit score builder and financial institution, announced that they experienced a data breach. The company claimed that an unspecified amount of customer financial data was exposed during the breach and delayed sending notifications to affected customers for over a week after discovering the incident. Also, in May 2021, the Health Service Executive (HSE), one of Ireland's largest medical systems, suffered a major ransomware attack, which disrupted the IT systems of several Irish hospitals and further encrypted their database, forcing them to use paper-based records. Thus, such data breach activities in the region in various companies are raising the need for consent management solutions to protect the personal data of the citizens.

Furthermore, to protect the data of the citizens, governments of various countries in Europe introduced a few rules and policies. In May 2018, the European Union (EU) introduced the General Data Protection Regulation (GDPR), which is one of the strongest privacy and security laws in the world. The regulation was introduced to improve the protection of the data rights of Europeans and standardize the process of safeguarding these rights. As per government rules, any businesses or organizations that process the personal data of EU citizens must comply with the GDPR. Therefore, owing to such regulations, various companies are integrating consent management solutions. For instance, in October 2021, the European netID Foundation announced a partnership with Usercentrics. Under this partnership, Usercentrics supports seamless integration with netID products, allowing publishers and advertisers to link consent management and login services. Moreover, in May 2023, Google announced that by the beginning of 2024, all the publishers and developers using Google AdSense, Ad Manager, or AdMob would be required to use a Google-certified Consent Management Platform (CMP). This new CMP will be integrated with the IAB's Transparency and Consent Framework (TCF) when serving ads to users in the European Economic Area or the UK. Thus, strict regulation by the government and a rise in the integration of software with consent management solutions is expected to fuel the growth of the consent management market in Europe during the forecast period.

10.2.2 Europe Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Consent management market accounted for US\$ 168.11 million in the year 2022 and it is expected to grow at a CAGR of 21.0% during the forecast period 2023 - 2030, to reach US\$ 771.44 million in the year 2030.

Figure 34. Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)

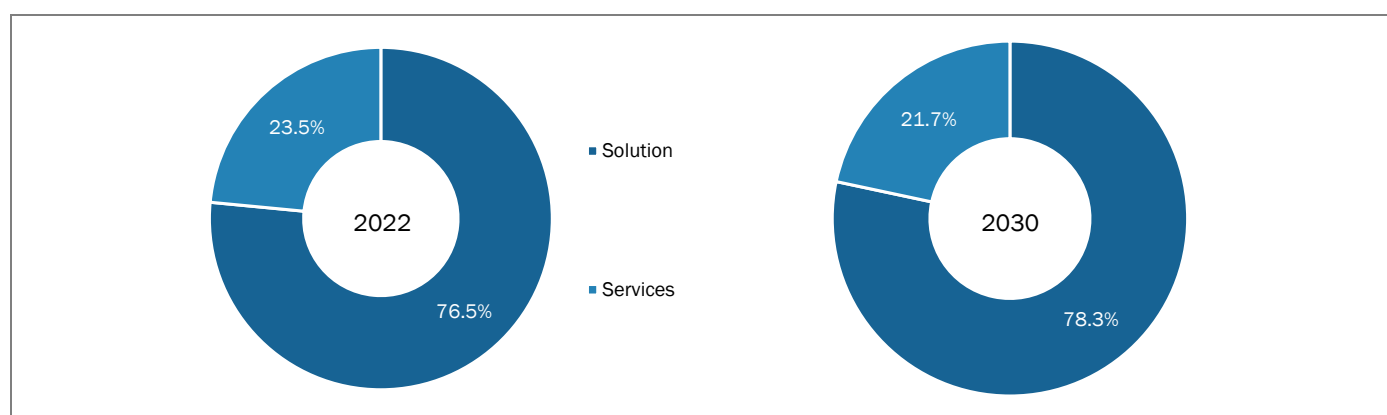


Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

10.2.3 Europe Consent Management Market Breakdown by Component

The consent management market was dominated by the Solution segment, which accounted to 76.5% in 2022 and is estimated to account for 78.3% market revenue share by 2030.

Figure 35. Consent Management Market Breakdown by Component (2022 and 2030)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

10.2.3.1 Europe Consent Management Market Revenue and Forecasts and Analysis - By Component

Table 23. Europe Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	91.73	108.58	128.63	152.91	182.68	219.82	266.60	325.61	398.98	489.86	604.39	21.3%
Services	28.87	33.74	39.47	46.33	54.64	64.91	77.71	93.67	113.27	137.23	167.05	19.8%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 128.63 million in 2022 and is projected to reach US\$ 604.39 million by 2030; it is expected to grow at a CAGR of 21.3% from 2022 to 2030.

Table 24. Europe Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	56.83	67.59	80.44	96.06	115.30	139.37	169.81	208.33	256.43	316.25	391.93	21.9%
Cookie Management	34.90	40.99	48.19	56.84	67.38	80.45	96.80	117.28	142.56	173.61	212.46	20.4%

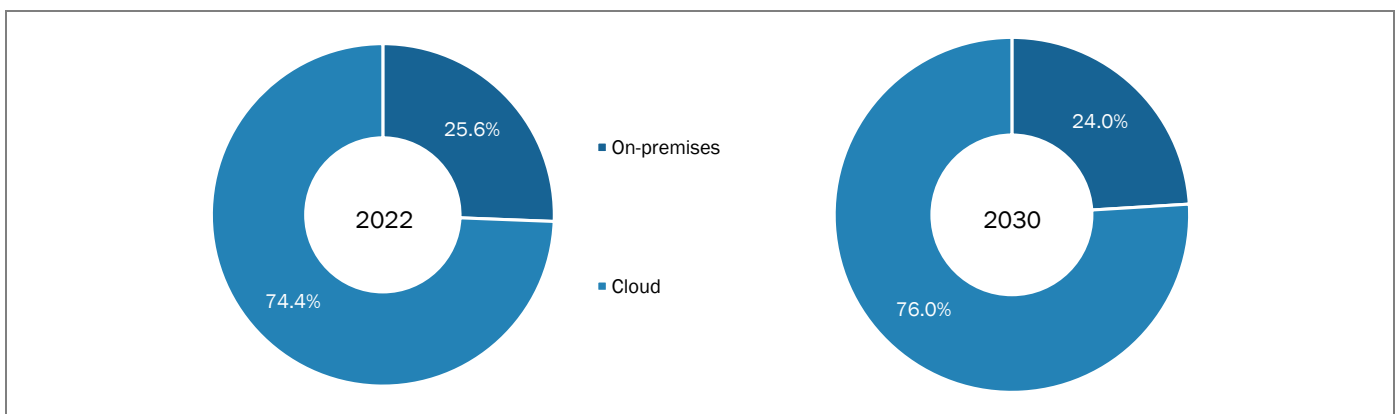
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 80.44 million in 2022 and is projected to reach US\$ 391.93 million by 2030; it is expected to grow at a CAGR of 21.9% from 2022 to 2030.

10.2.4 Europe Consent Management Market Breakdown by Deployment

The consent management market was dominated by the cloud-based segment, which accounted to 74.4% in 2022 and is estimated to account for 76.0% market revenue share by 2030.

Figure 36. Consent Management Market Breakdown by Deployment (2022 and 2030)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

10.2.4.1 Europe Consent Management Market Revenue and Forecasts and Analysis - By Deployment

Table 25. Europe Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022-2030)
On-premises	31.36	36.73	43.06	50.64	59.86	71.25	85.48	103.26	125.15	151.96	185.41	20.0%
Cloud-based	89.23	105.59	125.05	148.60	177.47	213.48	258.83	316.02	387.10	475.13	586.03	21.3%

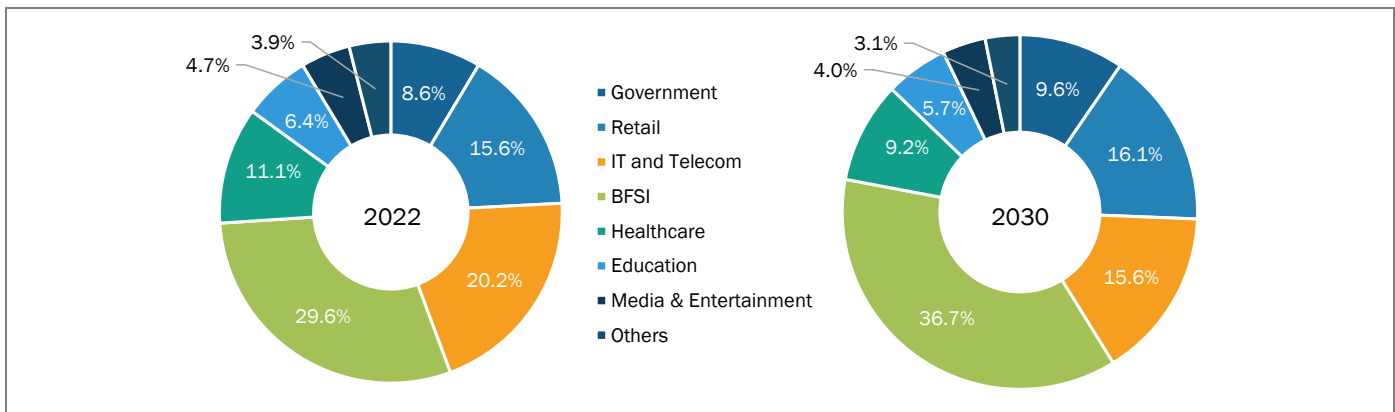
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 125.05 million in 2022 and is projected to reach US\$ 586.03 million by 2030; it is expected to grow at a CAGR of 21.3% from 2022 to 2030.

10.2.5 Europe Consent Management Market Breakdown by End-use Industry

The consent management market was dominated by the BFSI segment, which accounted to 29.6% in 2022 and is estimated to account for 36.7% market revenue share by 2030.

Figure 37. Consent Management Market Breakdown by End-use Industry (2022 and 2030)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

10.2.5.1 Europe Consent Management Market Revenue and Forecasts and Analysis - By End-use Industry

Table 26. Europe Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	10.03	12.01	14.39	17.30	20.90	25.42	31.17	38.48	47.64	59.11	73.67	22.6%
Retail	18.71	22.16	26.27	31.24	37.35	44.97	54.57	66.69	81.77	100.45	124.01	21.4%
IT and Telecom	25.71	29.52	33.91	39.04	45.15	52.53	61.55	72.54	85.69	101.30	120.19	17.1%
BFSI	33.55	40.86	49.77	60.76	74.50	91.92	114.23	142.84	179.09	224.84	283.48	24.3%
Healthcare	13.88	16.06	18.58	21.57	25.15	29.53	34.92	41.57	49.62	59.31	71.21	18.3%
Education	7.92	9.22	10.75	12.57	14.77	17.48	20.84	25.02	30.14	36.36	44.07	19.3%
Media and Entertainment	5.85	6.78	7.85	9.13	10.66	12.54	14.86	17.72	21.19	25.38	30.54	18.5%
Others	4.95	5.71	6.58	7.61	8.84	10.34	12.17	14.41	17.11	20.34	24.27	17.7%

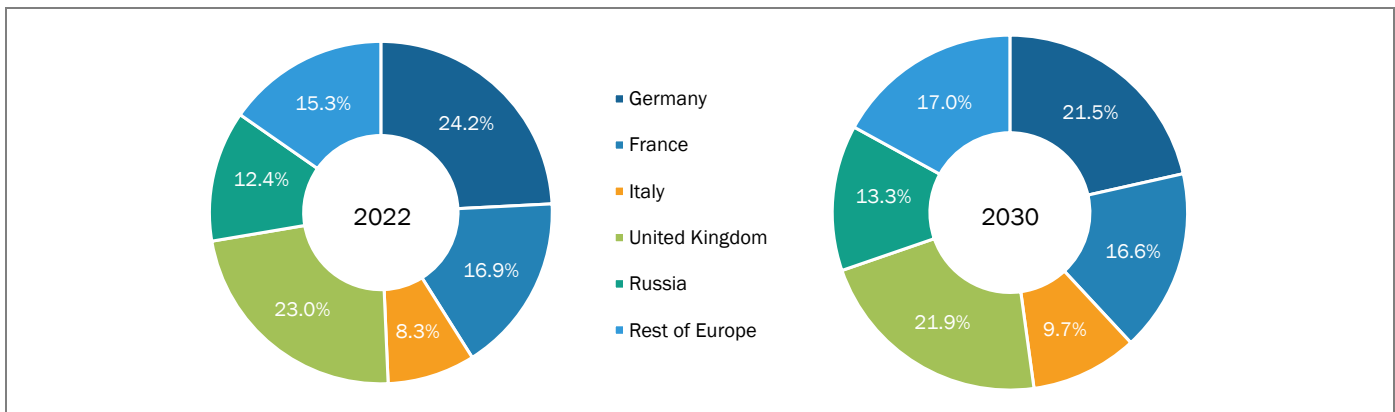
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 49.77 million in 2022 and is projected to reach US\$ 283.48 million by 2030; it is expected to grow at a CAGR of 24.3% from 2022 to 2030.

10.2.6 Europe Consent Management Market Revenue and Forecasts and Analysis - By Countries

The consent management market was dominated by the UK, which accounted to 23.0% in 2022 and is estimated to account for 21.9% market revenue share by 2030. For the years 2022 to 2030, the consent management market based on key countries in Europe region is shown in the figure provided below:

Figure 38. Consent Management market Breakdown by Key Countries, 2022 and 2030 (%)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

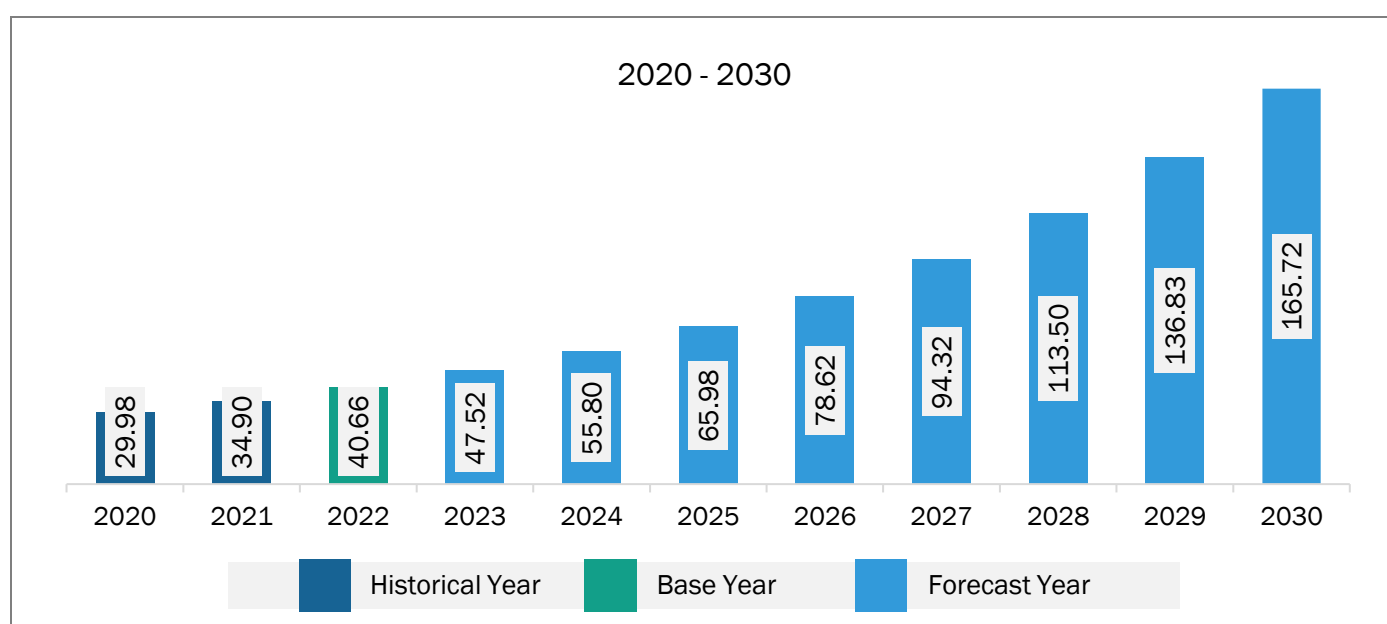
Table 27. Europe Consent Management Market, by Country – Revenue and Forecast to 2030 (USD Million)

Country	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Germany	29.98	34.90	40.66	47.52	55.80	65.98	78.62	94.32	113.50	136.83	165.72	19.2%
France	20.42	24.05	28.35	33.54	39.88	47.75	57.63	70.04	85.41	104.36	128.14	20.7%
Italy	9.53	11.51	13.90	16.84	20.50	25.11	31.00	38.52	48.01	59.92	75.14	23.5%
United Kingdom	28.09	32.95	38.68	45.56	53.94	64.31	77.28	93.52	113.53	138.10	168.80	20.2%
Russian Federation	14.63	17.43	20.78	24.85	29.88	36.18	44.14	54.24	66.86	82.57	102.47	22.1%
Rest of Europe	17.95	21.49	25.74	30.93	37.34	45.40	55.63	68.63	84.93	105.30	131.17	22.6%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market in Germany was worth US\$ 40.66 million in 2022 and is projected to reach US\$ 165.72 million by 2030; it is expected to grow at a CAGR of 19.2% from 2022 to 2030. The market in Italy is estimated to be worth US\$ 75.14 million by 2030 and is expected to grow at a CAGR of 23.5% during the 2022 - 2030 period.

10.2.6.1 Germany Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 39. Germany Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in Germany was valued at US\$ 40.66 million in 2022 and is projected to reach US\$ 165.72 million by 2030; it is expected to grow at a CAGR of 19.2% during the forecast period.

In Germany, data protection and consent management are based on the Basic Law's right to informal self-determination. On May 20, 2021, the Bundestag (German Parliament) passed the "Telecommunications and Telemedia Data Protection Act" (TTDSG), which aims to amend the Telecommunications Act (TKG) and the Telemedia Act (TMG), thereby adapting both laws to the GDPR in accordance with the EU's ePrivacy Directive. The Federal Supreme Court issued a decision on May 28, 2020, stating that the EU Cookie Directive has not been fully incorporated into federal legislation, which created

the demand for data protection and consent management solutions. The TTDSG was launched on December 1, 2021; and the act came into force on December 1, 2021. According to the TTDSG, a fine of US\$ 339,720 will be imposed for data breaches. Moreover, in August 2022, the Digital and Transport Ministry of Germany announced its plan to work on a draft law for a new cookie consent management regulation that aims to reduce the pop-ups encountered by users on websites. Thus, such strict regulation by the government of Germany is expected to fuel the growth of the consent management market.

10.2.6.1.1 Germany Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in Germany is shown in the table provided below:

Table 28. Germany Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	22.98	26.82	31.32	36.70	43.20	51.22	61.18	73.59	88.77	107.28	130.26	19.5%
Services	7.00	8.08	9.34	10.82	12.59	14.76	17.44	20.74	24.73	29.55	35.46	18.2%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 31.32 million in 2022 and is projected to reach US\$ 130.26 million by 2030; it is expected to grow at a CAGR of 19.5% from 2022 to 2030.

Table 29. Germany Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	13.95	16.36	19.19	22.58	26.71	31.80	38.16	46.10	55.86	67.81	82.69	20.0%
Cookie Management	9.03	10.47	12.14	14.12	16.50	19.41	23.02	27.48	32.91	39.47	47.56	18.6%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 19.19 million in 2022 and is projected to reach US\$ 82.69 million by 2030; it is expected to grow at a CAGR of 20.0% from 2022 to 2030.

10.2.6.1.2 Germany Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in Germany is shown in the table provided below:

Table 30. Germany Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	7.68	8.86	10.23	11.85	13.79	16.17	19.09	22.69	27.06	32.32	38.78	18.1%
Cloud-based	22.31	26.05	30.43	35.67	42.00	49.81	59.53	71.63	86.45	104.51	126.94	19.5%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 30.43 million in 2022 and is projected to reach US\$ 126.94 million by 2030; it is expected to grow at a CAGR of 19.5% from 2022 to 2030.

10.2.6.1.3 Germany Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in Germany is shown in the table provided below:

Table 31. Germany Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

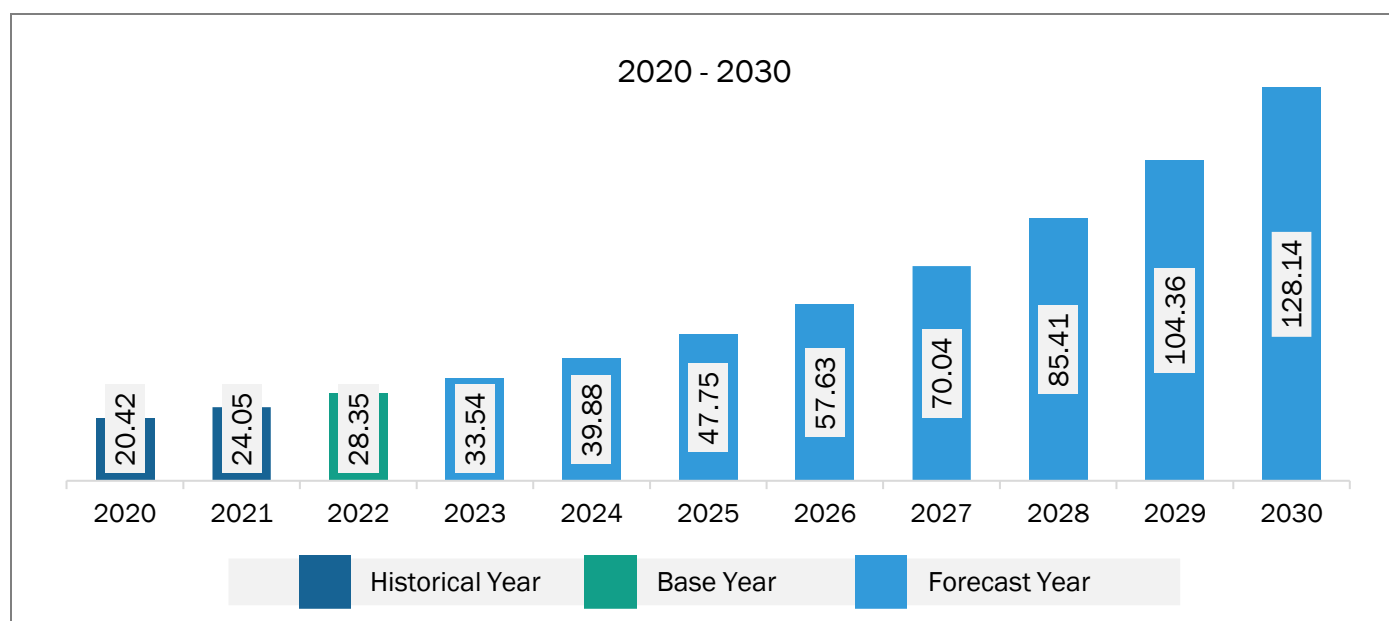
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	2.31	2.72	3.21	3.79	4.50	5.37	6.47	7.84	9.53	11.60	14.19	20.4%
Retail	4.79	5.59	6.54	7.67	9.04	10.73	12.84	15.46	18.67	22.59	27.46	19.6%
IT and Telecom	6.26	7.09	8.02	9.10	10.36	11.87	13.69	15.88	18.46	21.46	25.03	15.3%
BFSI	8.10	9.74	11.71	14.10	17.05	20.75	25.42	31.33	38.71	47.88	59.45	22.5%
Healthcare	3.59	4.10	4.68	5.37	6.18	7.16	8.35	9.81	11.55	13.62	16.12	16.7%
Education	2.07	2.38	2.74	3.17	3.67	4.29	5.05	5.98	7.10	8.45	10.10	17.7%
Media and Entertainment	1.53	1.75	2.01	2.30	2.66	3.08	3.61	4.24	5.01	5.92	7.03	17.0%
Others	1.33	1.52	1.75	2.01	2.33	2.72	3.19	3.77	4.47	5.31	6.33	17.4%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 11.71 million in 2022 and is projected to reach US\$ 59.45 million by 2030; it is expected to grow at a CAGR of 22.5% from 2022 to 2030.

10.2.6.2 France Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 40. France Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in France was valued at US\$ 28.35 million in 2022 and is projected to reach US\$ 128.14 million by 2030; it is expected to grow at a CAGR of 20.7% during the forecast period.

In October 2020, The French Data Protection Authority (CNIL) revised and updated its guidelines on cookies and other online tracking technologies. The new guideline is applied in particular to HTTP cookies and other technologies, such as local shared objects, local storage integrated within HTML 5, device fingerprinting and identifiers generated by operating systems particularly for advertising purposes, device identifiers, etc. Thus, these revised guidelines clarify some important aspects of the applicable French law.

Moreover, severe cyberattacks are becoming a huge threat to hospitals, political organizations, IT service providers, and military contractors in France. For instance, in August 2022, critical medical systems were locked down in a ransomware attack at South Francilien Hospital Center (Centre Hospitalier Sud Francilien, CHSF) in Corbeil-Essonnes. Additionally, in France, companies are taking several initiatives to remain competitive in the market. For instance, in March 2021, Didomi, a French consent management platform, released an expanded version of its offering for the web and mobile apps that support consent compliance for connected TV, OTT, and smart TVs. Therefore, the increasing threat of cyber-attacks, the growing number of initiatives by companies, and government regulations and policies related to data privacy are boosting the consent management market in the country.

10.2.6.2.1 France Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in France is shown in the table provided below:

Table 32. France Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	15.65	18.48	21.84	25.90	30.88	37.07	44.85	54.65	66.80	81.82	100.71	21.1%
Services	4.77	5.57	6.51	7.64	9.00	10.68	12.78	15.40	18.61	22.54	27.42	19.7%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 21.84 million in 2022 and is projected to reach US\$ 100.71 million by 2030; it is expected to grow at a CAGR of 21.1% from 2022 to 2030.

Table 33. France Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	9.62	11.42	13.56	16.15	19.33	23.31	28.33	34.67	42.57	52.37	64.75	21.6%
Cookie Management	6.02	7.06	8.29	9.76	11.54	13.75	16.52	19.97	24.23	29.45	35.97	20.1%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 13.56 million in 2022 and is projected to reach US\$ 64.75 million by 2030; it is expected to grow at a CAGR of 21.6% from 2022 to 2030.

10.2.6.2.2 France Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in France is shown in the table provided below:

Table 34. France Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	4.96	5.79	6.77	7.93	9.34	11.08	13.24	15.94	19.25	23.29	28.32	19.6%
Cloud-based	15.46	18.26	21.59	25.61	30.54	36.67	44.39	54.10	66.16	81.07	99.82	21.1%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 21.59 million in 2022 and is projected to reach US\$ 99.82 million by 2030; it is expected to grow at a CAGR of 21.1% from 2022 to 2030.

10.2.6.2.3 France Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in France is shown in the table provided below:

Table 35. France Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

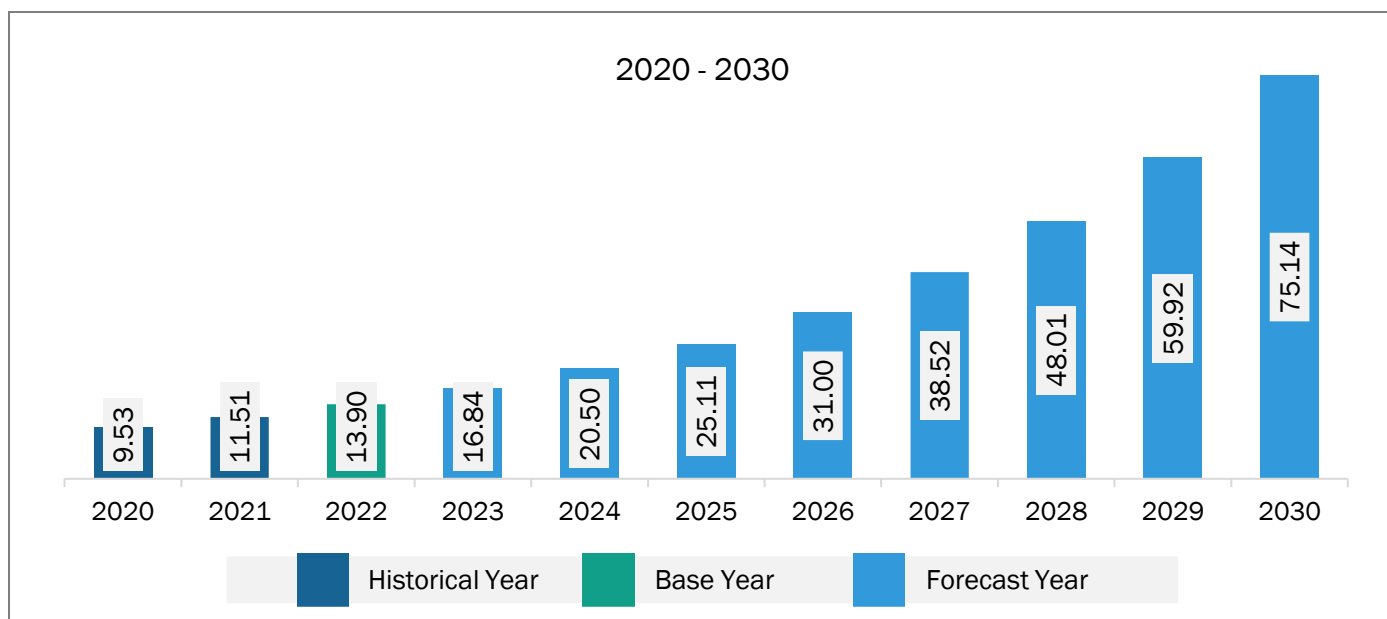
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	1.70	2.03	2.43	2.92	3.52	4.28	5.24	6.46	7.98	9.89	12.30	22.5%
Retail	3.17	3.75	4.44	5.27	6.29	7.56	9.16	11.17	13.68	16.77	20.67	21.2%
IT and Telecom	4.34	4.97	5.70	6.54	7.55	8.76	10.25	12.05	14.20	16.74	19.82	16.9%
BFSI	5.67	6.89	8.38	10.21	12.49	15.37	19.07	23.79	29.77	37.30	46.93	24.0%
Healthcare	2.37	2.74	3.16	3.67	4.27	5.01	5.91	7.03	8.38	10.01	12.01	18.1%
Education	1.36	1.58	1.84	2.15	2.52	2.98	3.55	4.25	5.11	6.16	7.46	19.1%
Media and Entertainment	0.99	1.14	1.32	1.54	1.79	2.10	2.49	2.96	3.54	4.23	5.09	18.3%
Others	0.82	0.95	1.09	1.25	1.45	1.68	1.97	2.33	2.75	3.25	3.86	17.2%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 8.38 million in 2022 and is projected to reach US\$ 46.93 million by 2030; it is expected to grow at a CAGR of 24.0% from 2022 to 2030.

10.2.6.3 Italy Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 41. Italy Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in Italy was valued at US\$ 13.90 million in 2022 and is projected to reach US\$ 75.14 million by 2030; it is expected to grow at a CAGR of 23.5% during the forecast period.

In 2018, the Italian government implemented the General Data Protection Regulation (GDPR), which sets strict requirements for organizations to collect and use personal data. GDPR has raised awareness of data privacy issues among businesses and consumers in Italy. This has created a demand for consent management solutions that can help businesses comply with the GDPR and other data privacy regulations. Moreover, the use of cookies and other tracking technologies is increasing in Italy as businesses are seeking ways to track and target their customers more effectively. This has led to a need for consent management solutions that can help businesses obtain consent from users before tracking them.

The Italian Data Protection Authority (Garante for la protezione dei dati personali) issued updated cookie usage guidelines on June 10, 2021. It follows a six-month public deliberation on the topic of cookies. The goal of these new guidelines is to establish the legal requirements that apply to the usage of cookies and to propose technical solutions for correctly implementing these responsibilities while avoiding punishments. Thus, such guidelines and initiatives are driving the demand for consent management solutions in Italy. Hence, the market is expected to continue growing in the coming years.

10.2.6.3.1 Italy Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in Italy is shown in the table provided below:

Table 36. Italy Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	7.30	8.85	10.74	13.06	15.95	19.62	24.31	30.32	37.93	47.52	59.81	23.9%
Services	2.22	2.65	3.16	3.78	4.54	5.49	6.69	8.20	10.08	12.40	15.33	21.8%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 10.74 million in 2022 and is projected to reach US\$ 59.81 million by 2030; it is expected to grow at a CAGR of 23.9% from 2022 to 2030.

Table 37. Italy Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	4.56	5.54	6.75	8.24	10.11	12.48	15.53	19.45	24.42	30.72	38.81	24.4%
Cookie Management	2.75	3.31	3.99	4.81	5.84	7.14	8.78	10.88	13.51	16.81	21.00	23.1%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 6.75 million in 2022 and is projected to reach US\$ 38.81 million by 2030; it is expected to grow at a CAGR of 24.4% from 2022 to 2030.

10.2.6.3.2 Italy Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in Italy is shown in the table provided below:

Table 38. Italy Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	3.09	3.70	4.43	5.32	6.42	7.80	9.54	11.75	14.52	17.96	22.32	22.4%
Cloud-based	6.44	7.81	9.47	11.52	14.08	17.32	21.46	26.77	33.49	41.97	52.82	24.0%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 9.47 million in 2022 and is projected to reach US\$ 52.82 million by 2030; it is expected to grow at a CAGR of 24.0% from 2022 to 2030.

10.2.6.3.3 Italy Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on End-use Industry in Italy is shown in the table provided below:

Table 39. Italy Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

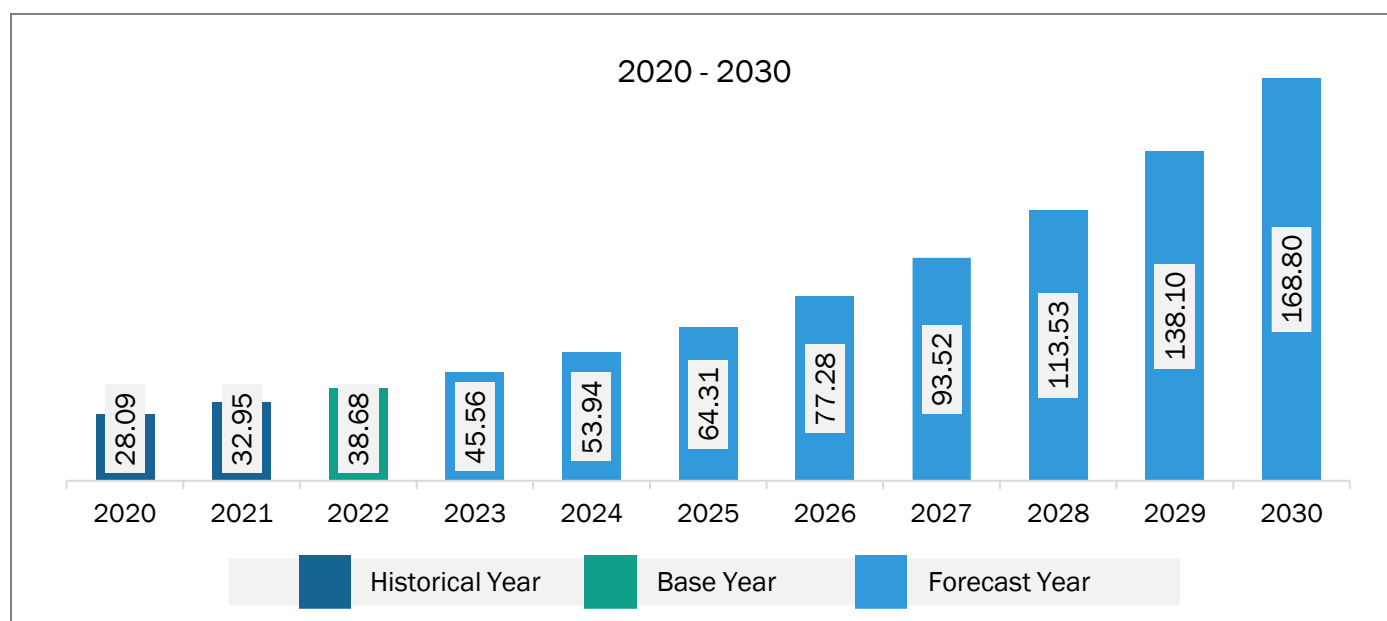
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	0.82	1.00	1.23	1.51	1.86	2.31	2.90	3.65	4.61	5.83	7.40	25.2%
Retail	1.45	1.76	2.13	2.59	3.16	3.89	4.82	6.02	7.53	9.43	11.87	24.0%
IT and Telecom	2.05	2.41	2.83	3.33	3.94	4.68	5.60	6.74	8.12	9.79	11.84	19.6%
BFSI	2.68	3.34	4.16	5.19	6.50	8.19	10.38	13.24	16.93	21.66	27.82	26.8%
Healthcare	1.08	1.28	1.51	1.80	2.14	2.57	3.10	3.77	4.59	5.59	6.84	20.7%
Education	0.62	0.74	0.88	1.05	1.26	1.53	1.86	2.28	2.80	3.44	4.26	21.8%
Media and Entertainment	0.45	0.54	0.63	0.75	0.90	1.08	1.31	1.59	1.94	2.37	2.91	21.0%
Others	0.38	0.44	0.52	0.61	0.73	0.86	1.03	1.24	1.50	1.81	2.19	19.7%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 4.16 million in 2022 and is projected to reach US\$ 27.82 million by 2030; it is expected to grow at a CAGR of 26.8% from 2022 to 2030.

10.2.6.4 UK Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 42. UK Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in UK was valued at US\$ 38.68 million in 2022 and is projected to reach US\$ 168.80 million by 2030; it is expected to grow at a CAGR of 20.2% during the forecast period.

The UK has several data privacy regulations, such as the General Data Protection Regulation (GDPR), which require organizations to obtain consent from individuals before collecting or using their personal data. This has led to an increased demand for consent management solutions that can help organizations comply with these regulations. Additionally, the increasing number of cyberattacks and data breaches has made individuals more aware of the importance of protecting their personal data. For instance, according to Kingfisher Insurance, its IT systems were breached by the famed ransomware cartel LockBit, and the company was forced to shut down the servers after discovering the cyber problem. The hackers retrieved 1.4 TB of firm data, including customer and employee information. Such incidents increased the demand for consent management solutions that can help individuals control their personal data and prevent it from being misused.

Despite not being a member of the European Union (EU), the UK continues to follow the data protection law firmly oriented towards the EU as well as the GDPR. In addition to GDPR, the government of UK has also added some different regulations, particularly in relation to cookies, with the exception that the Information Commissioner's Office (ICO), as a competent authority, is not only financially strong but also widely regarded as much stricter and more active than German authorities. The ICO allows a few exceptions to the requirement for explicitly unambiguous consent such as cookies that can be set without prior consent must be "strictly necessary." For example, cookies that allow a shopping cart to be saved for the next session or are used to ensure the security of online banking. Therefore, increased awareness of data privacy regulations, rising cyberattacks and data breaches, and growing demand for customer-centricity are key factors contributing to the consent management market in the UK.

10.2.6.4.1 UK Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in the UK is shown in the table provided below:

Table 40. UK Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	20.97	24.69	29.10	34.42	40.90	48.96	59.06	71.74	87.43	106.76	130.99	20.7%
Services	7.12	8.26	9.58	11.15	13.04	15.35	18.22	21.78	26.10	31.34	37.81	18.7%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 29.10 million in 2022 and is projected to reach US\$ 130.99 million by 2030; it is expected to grow at a CAGR of 20.7% from 2022 to 2030.

Table 41. UK Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	12.80	15.14	17.92	21.29	25.42	30.56	37.03	45.18	55.31	67.83	83.59	21.2%
Cookie Management	8.17	9.55	11.18	13.12	15.48	18.40	22.03	26.56	32.12	38.93	47.40	19.8%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 17.92 million in 2022 and is projected to reach US\$ 83.59 million by 2030; it is expected to grow at a CAGR of 21.2% from 2022 to 2030.

10.2.6.4.2 UK Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in the UK is shown in the table provided below:

Table 42. UK Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	5.90	6.84	7.94	9.25	10.83	12.77	15.16	18.13	21.75	26.14	31.57	18.8%
Cloud-based	22.19	26.10	30.74	36.31	43.11	51.54	62.12	75.38	91.78	111.96	137.23	20.6%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 30.74 million in 2022 and is projected to reach US\$ 137.23 million by 2030; it is expected to grow at a CAGR of 20.6% from 2022 to 2030.

10.2.6.4.3 UK Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in the UK is shown in the table provided below:

Table 43. UK Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

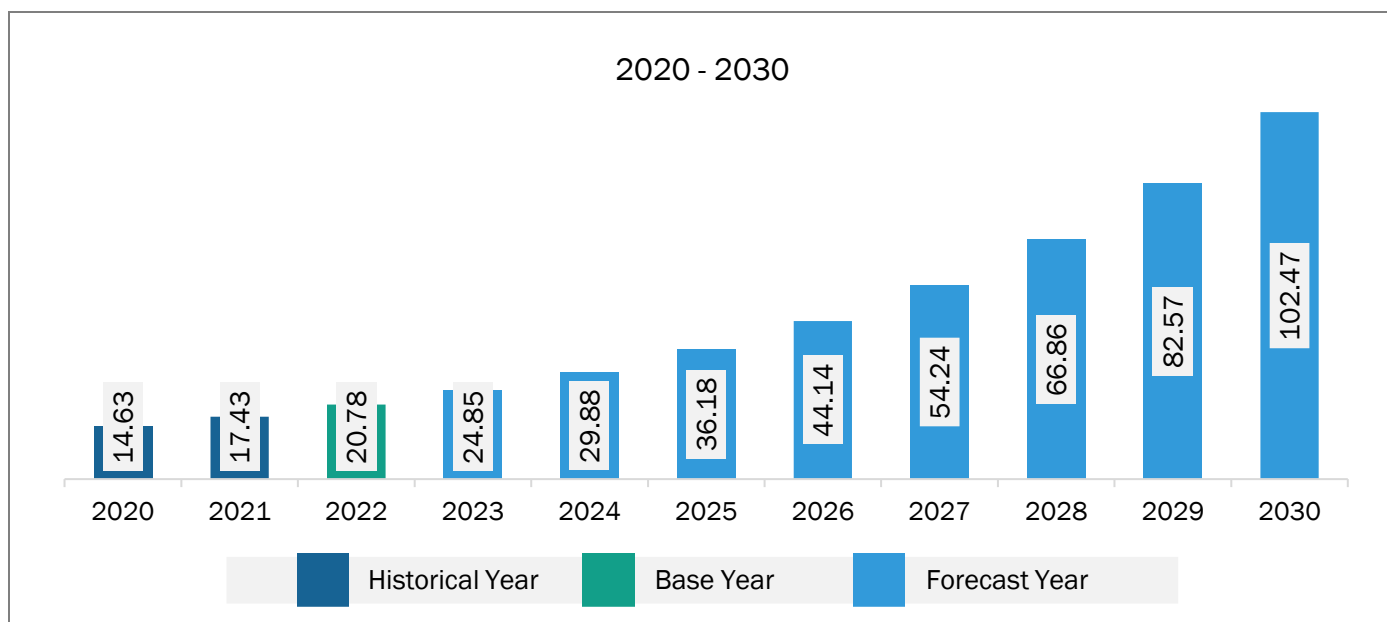
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	2.24	2.67	3.18	3.81	4.57	5.53	6.75	8.29	10.20	12.59	15.60	22.0%
Retail	4.44	5.23	6.16	7.29	8.66	10.37	12.50	15.19	18.51	22.59	27.72	20.7%
IT and Telecom	5.93	6.76	7.71	8.82	10.13	11.71	13.62	15.94	18.70	21.95	25.85	16.3%
BFSI	7.71	9.34	11.31	13.72	16.72	20.51	25.33	31.48	39.22	48.93	61.30	23.5%
Healthcare	3.30	3.79	4.37	5.04	5.85	6.83	8.03	9.51	11.29	13.43	16.03	17.7%
Education	1.89	2.19	2.55	2.96	3.46	4.07	4.83	5.77	6.91	8.29	10.00	18.7%
Media and Entertainment	1.40	1.62	1.87	2.16	2.51	2.93	3.46	4.11	4.89	5.82	6.97	17.9%
Others	1.17	1.34	1.54	1.76	2.03	2.36	2.75	3.24	3.81	4.49	5.32	16.8%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 11.31 million in 2022 and is projected to reach US\$ 61.30 million by 2030; it is expected to grow at a CAGR of 23.5% from 2022 to 2030.

10.2.6.5 Russia Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 43. Russia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in Russia was valued at US\$ 20.78 million in 2022 and is projected to reach US\$ 102.47 million by 2030; it is expected to grow at a CAGR of 22.1% during the forecast period.

Amendments to Russia's general data protection law (Federal Law No. 152-FZ on Personal Data) passed by the end of 2020 and entered into effect on March 1, 2021, with some of them postponed until July 1, 2021. The amendments are part of a legislative package that also includes modifications to the Criminal Code to make the leaking of personal data about government officials a crime. The data protection law amendments envision the implementation of consent-based restrictions for any organization or individual that initially publishes personal data. It also imposes restrictions on those who collect and further disseminate personal data distributed on social media and other public domains with consent.

Moreover, the data breaches in Russia surged in 2022, and will continue to increase in 2023. For instance, a Russian ransomware group gained access to data from federal agencies, including the Energy Department, in an attack that exploited file transfer software to steal and sell users' data. Furthermore, the Russian government is taking initiatives for data security services. For instance, in September 2022, the Ministry of Digital Development, Telecommunications and Mass Media announced its proposals to create a consent pop-up during the processing of personal data via a public service portal. According to the ministry, this proposal would enable individuals to provide and withdraw consent while getting various services from government organizations and banks or when registering for loyalty schemes. The ministry also stated that the registry would allow individuals to access information regarding the consent they have given, to whom it was given, and when it was granted, as well as regulate the deletion of their personal data. Therefore, the increasing number of data breaches and growing initiatives regarding data privacy are boosting the consent management market in the country.

10.2.6.5.1 Russia Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in Russia is shown in the table provided below:

Table 44. Russia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	11.06	13.22	15.80	18.95	22.84	27.72	33.91	41.77	51.62	63.91	79.52	22.4%
Services	3.56	4.21	4.98	5.91	7.04	8.46	10.23	12.47	15.24	18.66	22.95	21.1%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 15.80 million in 2022 and is projected to reach US\$ 79.52 million by 2030; it is expected to grow at a CAGR of 22.4% from 2022 to 2030.

Table 45. Russia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	7.05	8.46	10.16	12.24	14.82	18.06	22.19	27.45	34.06	42.35	52.91	22.9%
Cookie Management	4.01	4.75	5.64	6.71	8.02	9.66	11.72	14.32	17.56	21.56	26.60	21.4%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 10.16 million in 2022 and is projected to reach US\$ 52.91 million by 2030; it is expected to grow at a CAGR of 22.9% from 2022 to 2030.

10.2.6.5.2 Russia Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in Russia is shown in the table provided below:

Table 46. Russia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	4.39	5.21	6.18	7.36	8.81	10.62	12.90	15.78	19.36	23.81	29.41	21.5%
Cloud-based	10.24	12.22	14.60	17.50	21.07	25.56	31.25	38.46	47.50	58.77	73.06	22.3%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 14.60 million in 2022 and is projected to reach US\$ 73.06 million by 2030; it is expected to grow at a CAGR of 22.3% from 2022 to 2030.

10.2.6.5.3 Russia Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in Russia is shown in the table provided below:

Table 47. Russia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

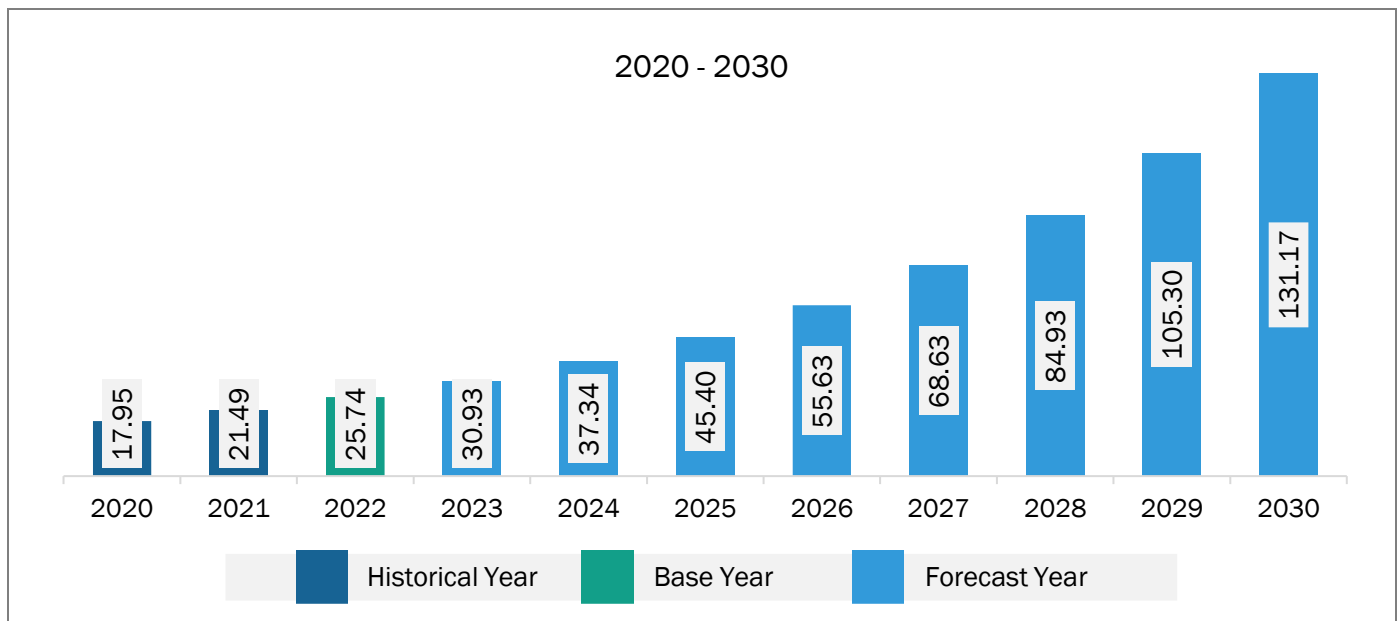
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	1.31	1.59	1.92	2.32	2.83	3.48	4.30	5.35	6.68	8.35	10.49	23.7%
Retail	2.20	2.63	3.15	3.78	4.57	5.55	6.80	8.39	10.38	12.87	16.04	22.6%
IT and Telecom	3.18	3.69	4.28	4.97	5.80	6.82	8.06	9.60	11.44	13.65	16.35	18.3%
BFSI	4.19	5.14	6.31	7.77	9.61	11.96	14.98	18.89	23.87	30.21	38.40	25.3%
Healthcare	1.60	1.87	2.18	2.55	3.00	3.56	4.24	5.09	6.12	7.38	8.92	19.3%
Education	0.90	1.06	1.24	1.47	1.74	2.08	2.50	3.03	3.68	4.47	5.47	20.3%
Media and Entertainment	0.68	0.79	0.93	1.09	1.28	1.52	1.82	2.19	2.64	3.18	3.86	19.5%
Others	0.57	0.66	0.77	0.89	1.04	1.22	1.44	1.72	2.05	2.45	2.93	18.3%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 6.31 million in 2022 and is projected to reach US\$ 38.40 million by 2030; it is expected to grow at a CAGR of 25.3% from 2022 to 2030.

10.2.6.6 Rest of Europe Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 44. Rest of Europe Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in rest of Europe was valued at US\$ 25.74 million in 2022 and is projected to reach US\$ 131.17 million by 2030; it is expected to grow at a CAGR of 22.6% during the forecast period.

The Rest of Europe consent management market is segmented into Ireland, Austria, and Sweden. The government regulations regarding the protection of people's data are driving the demand for consent management solutions across the region. Additionally, consistent data breach cases in several countries in the Rest of Europe are increasing the demand for consent management solutions. For instance, in December 2022, a trove of sensitive personal data relating to ~200 million Twitter users, including Twitterati in Ireland, appeared on a popular hacker forum. Also, in mid-May 2021, The Financial Times Daily reported that ransomware criminals had leaked 27 files, including medical records of at least 12 individuals, from Ireland's public-funded healthcare system—Health Service Executive (HSE). In May 2022, a significant cyberattack shut down ~3,000 systems in the Austrian federal state of Carinthia (Kärnten) responsible for processing passports, traffic penalties, and COVID-19 contact tracing. Similarly, in December 2021, Volvo Cars revealed that one of its file repositories had been hacked as a result of a cyberattack.

10.2.6.6.1 Rest of Europe Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in rest of Europe is shown in the table provided below:

Table 48. Rest of Europe Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	13.76	16.51	19.83	23.89	28.91	35.24	43.29	53.54	66.43	82.56	103.10	22.9%
Services	4.19	4.98	5.91	7.04	8.43	10.16	12.34	15.09	18.51	22.74	28.07	21.5%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 19.83 million in 2022 and is projected to reach US\$ 103.10 million by 2030; it is expected to grow at a CAGR of 22.9% from 2022 to 2030.

Table 49. Rest of Europe Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	8.85	10.67	12.86	15.56	18.92	23.16	28.56	35.48	44.20	55.17	69.18	23.4%
Cookie Management	4.91	5.85	6.97	8.33	10.00	12.09	14.73	18.07	22.23	27.40	33.93	21.9%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 12.86 million in 2022 and is projected to reach US\$ 69.18 million by 2030; it is expected to grow at a CAGR of 23.4% from 2022 to 2030.

10.2.6.6.2 Rest of Europe Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in rest of Europe is shown in the table provided below:

Table 50. Rest of Europe Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	5.35	6.34	7.51	8.93	10.66	12.83	15.54	18.96	23.20	28.44	35.02	21.2%
Cloud-based	12.60	15.15	18.23	22.00	26.68	32.58	40.09	49.67	61.73	76.86	96.15	23.1%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 18.23 million in 2022 and is projected to reach US\$ 96.15 million by 2030; it is expected to grow at a CAGR of 23.1% from 2022 to 2030.

10.2.6.6.3 Rest of Europe Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in rest of Europe is shown in the table provided below:

Table 51. Rest of Europe Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	1.64	2.00	2.42	2.95	3.61	4.45	5.52	6.90	8.64	10.85	13.68	24.2%
Retail	2.66	3.20	3.85	4.64	5.63	6.87	8.45	10.47	13.00	16.19	20.24	23.1%
IT and Telecom	3.95	4.61	5.37	6.27	7.36	8.68	10.32	12.33	14.77	17.71	21.30	18.8%
BFSI	5.19	6.41	7.90	9.77	12.13	15.15	19.05	24.11	30.59	38.86	49.57	25.8%
Healthcare	1.95	2.28	2.67	3.14	3.71	4.41	5.28	6.36	7.68	9.29	11.28	19.7%
Education	1.08	1.27	1.50	1.78	2.12	2.54	3.06	3.72	4.53	5.53	6.79	20.8%
Media and Entertainment	0.80	0.93	1.10	1.29	1.53	1.82	2.18	2.63	3.18	3.85	4.68	19.9%
Others	0.68	0.79	0.93	1.08	1.27	1.49	1.77	2.11	2.53	3.03	3.63	18.7%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 7.90 million in 2022 and is projected to reach US\$ 49.57 million by 2030; it is expected to grow at a CAGR of 25.8% from 2022 to 2030.

10.3 Asia Pacific Consent Management Market

10.3.1 Overview

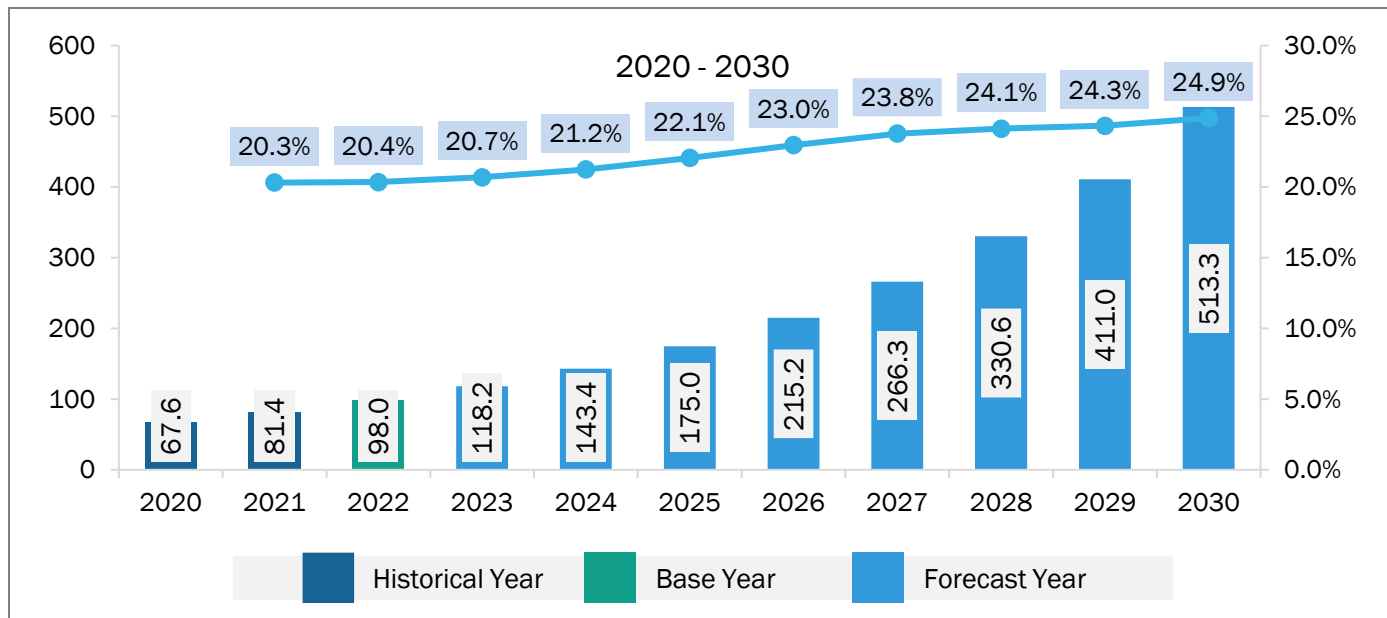
The consent management market in Asia Pacific (APAC) is segmented into Australia, China, India, Japan, South Korea, and the Rest of APAC. The region witnessed various data breach activities, which posed significant risks to citizens' privacy. In October 2022, Medibank, an Australian health insurance provider, suffered a data breach that affected 9.7 million people. Similarly, in October 2022, Toyota, a Japanese car manufacturer, issued a statement and an apology after discovering that third parties had gained unauthorized access to customer details between December 2017 and September 2022. In October 2022, MyDeal, an Australian online retail marketplace, confirmed that it experienced a data breach that exposed the data of ~2.2 million customers. Thus, such data breach activity is raising concerns about data privacy among citizens. To cater to this concern, governments of various countries are launching different data privacy protection policies. For instance, in 2022, the Ministry of Electronics and Information Technology (MeitY) of India released a draft of the Digital Personal Data Protection Bill, which introduced a new framework for personal data protection. Through this bill, the government of India aimed to frame the rights and duties of the citizen and the obligations to use collected data lawfully. Also, in Australia, in 2022, the government announced increasing fines under the Privacy Act 1988 for data breaches. Under this, the maximum fine for a serious invasion or repeated invasion of privacy will be increased to approximately US\$ 6.79 million (AUD 10 million), thrice the amount of any benefit obtained from the invasion breach and 10% of Australian annual revenue. Thus, the introduction of such regulations by the government to overcome the growing data breach activities in the region is propelling the growth of the APAC consent management market.

Furthermore, APAC is witnessing tremendous growth in the retail & e-commerce sector. According to the International Air Transport Association (IATA), APAC registered the largest growth of the e-commerce market globally. As per the International Trade Administration, the e-commerce market of China is the largest in the world and generates ~50% of the world's transactions. According to International Trade Administration, Australia—the eleventh-largest e-commerce market in the world—is expected to reach US\$ 32.3 billion by 2024. According to the India Brand Equity Foundation (IBEF), the e-commerce market in India is expected to reach US\$ 188 billion by 2025. Thus, the growth in the e-commerce sector is raising the need for consent management solutions, as a majority of online product-selling websites and apps are required to get consent and the preferences of the users. Along with getting consent, e-commerce websites and apps are also required to protect the personal data of the user, raising the need for consent management solutions. Thus, the growing e-commerce sector and government regulation to protect the privacy of the citizens are boosting the growth of the consent management market in APAC.

10.3.2 Asia Pacific Consent Management Market Revenue and Forecasts To 2030 (US\$ Million)

Asia Pacific consent management market accounted for US\$ 97.95 Million in the year 2022 and it is expected to grow at a CAGR of 23.0% during the forecast period, to reach US\$ 513.35 Million in the year 2030.

Figure 45. Asia Pacific Consent Management Market Revenue And Forecasts To 2030 (US\$ Million)

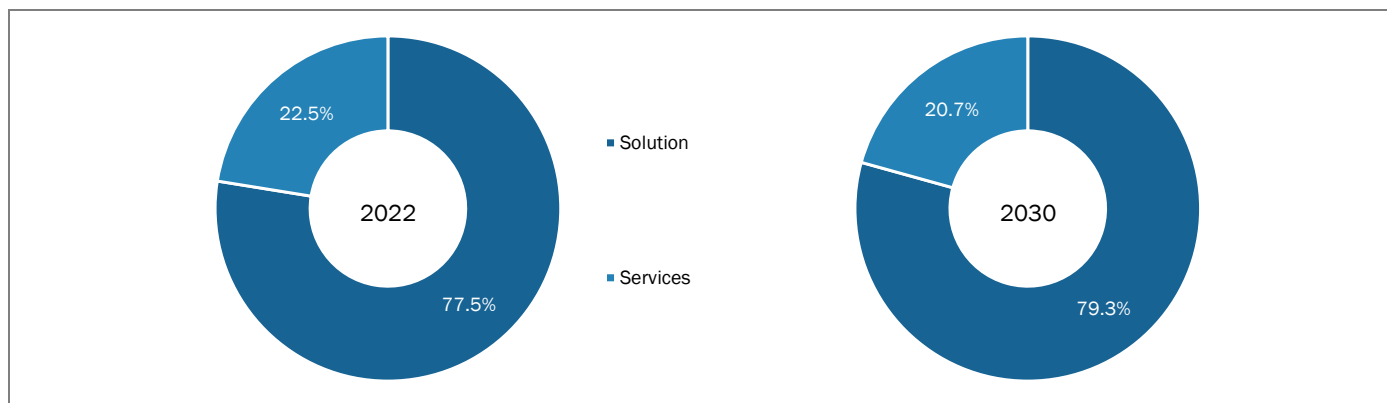


Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

10.3.3 Asia Pacific Consent Management Market Breakdown by Component

The consent management market was dominated by the Solution segment, which accounted to 77.5% in 2022 and is estimated to account for 79.3% market revenue share by 2030.

Figure 46. Asia Pacific Consent Management Market Breakdown by Component (2022 and 2030)



10.3.3.1 Asia Pacific Consent Management Market Revenue and Forecasts and Analysis - By Component

Table 52. Asia Pacific Consent Management Market Revenue And Forecasts To 2030 (US\$ Million) – Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	52.15	62.93	75.96	91.94	111.80	136.85	168.76	209.47	260.74	325.09	407.13	23.4%
Services	15.49	18.46	22.00	26.29	31.55	38.12	46.41	56.86	69.85	85.95	106.22	21.8%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 75.96 million in 2022 and is projected to reach US\$ 407.13 million by 2030; it is expected to grow at a CAGR of 23.4% from 2022 to 2030.

Table 53. Asia Pacific Consent Management Market Revenue And Forecasts To 2030 (US\$ Million) – Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	33.55	40.67	49.31	59.96	73.24	90.05	111.55	139.08	173.90	217.77	273.93	23.9%
Cookie Management	18.60	22.26	26.65	31.98	38.56	46.79	57.21	70.39	86.85	107.32	133.20	22.3%

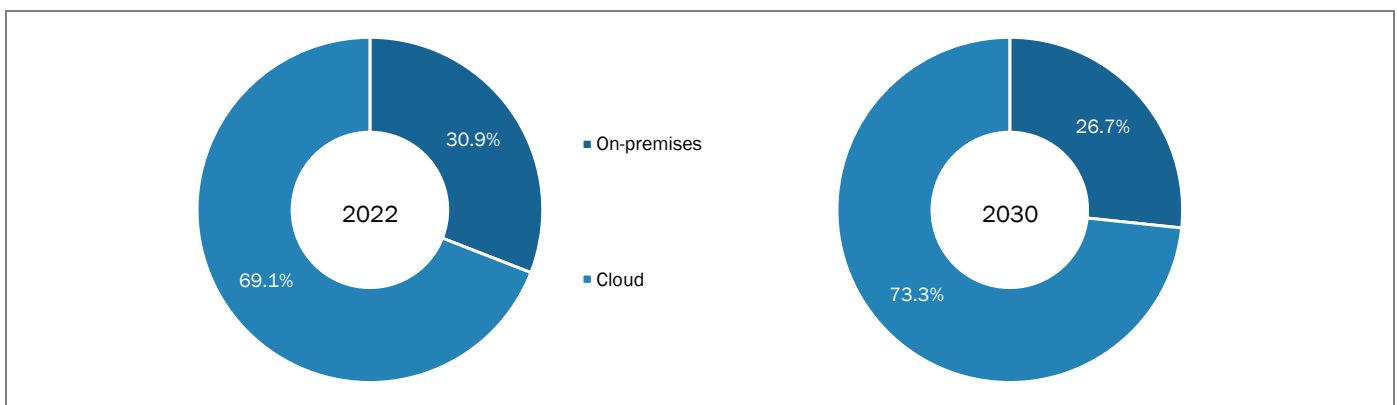
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 49.31 million in 2022 and is projected to reach US\$ 273.93 million by 2030; it is expected to grow at a CAGR of 23.9% from 2022 to 2030.

10.3.4 Asia Pacific Consent Management Market Breakdown by Deployment

The consent management market was dominated by the cloud-based segment, which accounted to 69.1% in 2022 and is estimated to account for 73.3% market revenue share by 2030.

Figure 47. Asia Pacific Consent Management Market Breakdown by Deployment (2022 and 2030)



10.3.4.1 Asia Pacific Consent Management Market Revenue and Forecasts and Analysis - By Deployment

Table 54. Asia Pacific Consent Management Market Revenue And Forecasts To 2030 (US\$ Million) – Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	21.62	25.59	30.29	35.94	42.81	51.33	61.98	75.30	91.71	111.82	136.90	20.8%
Cloud-based	46.02	55.79	67.67	82.29	100.54	123.64	153.18	191.02	238.89	299.21	376.45	23.9%

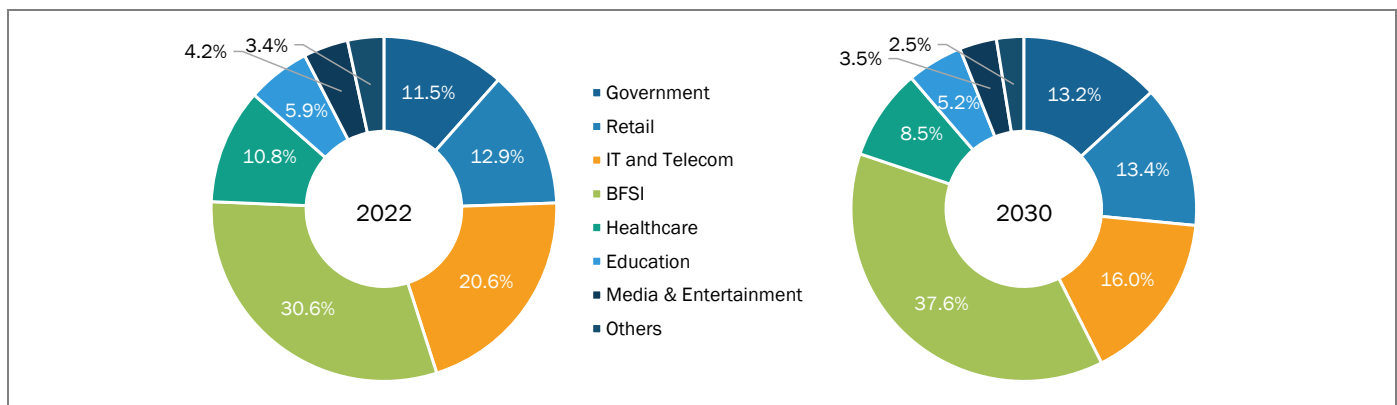
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 67.67 million in 2022 and is projected to reach US\$ 376.45 million by 2030; it is expected to grow at a CAGR of 23.9% from 2022 to 2030.

10.3.5 Asia Pacific Consent Management Market Breakdown by End-use Industry

The consent management market was dominated by the BFSI segment, which accounted to 30.6% in 2022 and is estimated to account for 37.6% market revenue share by 2030.

Figure 48. Asia Pacific Consent Management Market Breakdown by End-use Industry (2022 and 2030)



10.3.5.1 Asia Pacific Consent Management Market Revenue and Forecasts and Analysis - By End-use Industry

Table 55. Asia Pacific Consent Management Market Revenue And Forecasts To 2030 (US\$ Million) – End-use Industry

End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	7.52	9.22	11.30	13.88	17.12	21.26	26.59	33.46	42.22	53.35	67.69	25.1%
Retail	8.67	10.47	12.66	15.34	18.67	22.89	28.26	35.12	43.78	54.65	68.53	23.5%
IT and Telecom	14.70	17.23	20.18	23.68	27.90	33.06	39.42	47.28	56.80	68.27	82.33	19.2%
BFSI	19.54	24.21	29.99	37.23	46.38	58.14	73.37	93.14	118.51	150.94	193.01	26.2%
Healthcare	7.70	9.04	10.60	12.46	14.70	17.45	20.84	25.04	30.14	36.30	43.87	19.4%
Education	4.13	4.90	5.81	6.91	8.26	9.93	12.03	14.67	17.92	21.93	26.95	21.1%
Media and Entertainment	2.95	3.48	4.11	4.85	5.76	6.87	8.26	9.99	12.11	14.69	17.90	20.2%
Others	2.43	2.84	3.31	3.88	4.55	5.38	6.38	7.62	9.11	10.89	13.06	18.7%

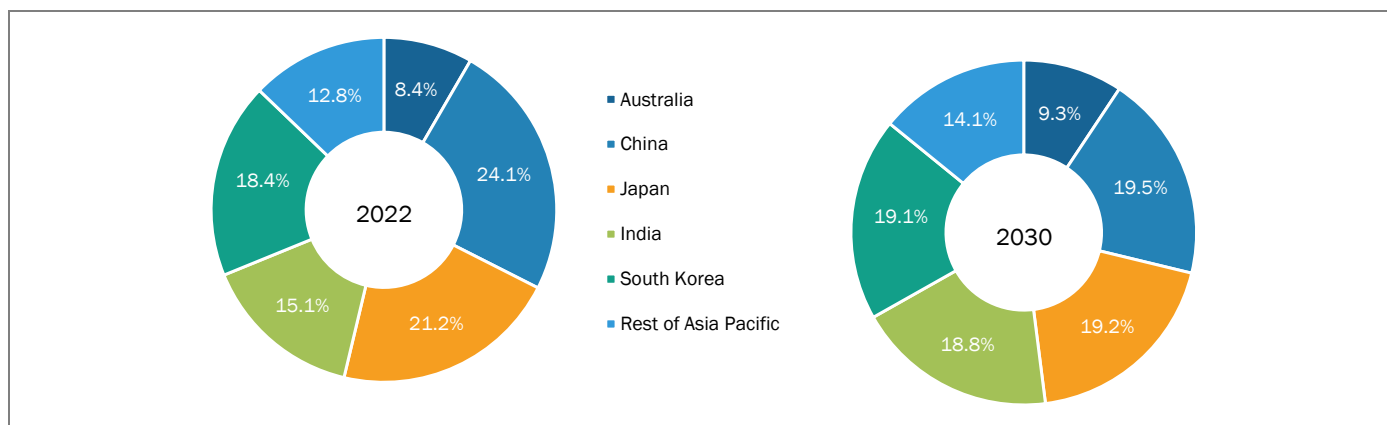
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 29.99 million in 2022 and is projected to reach US\$ 193.01 million by 2030; it is expected to grow at a CAGR of 26.2% from 2022 to 2030.

10.3.6 Consent Management market Breakdown by Countries

The consent management market was dominated by China, which accounted to 24.1% in 2022 and is estimated to account for 19.5% market revenue share by 2030. For the years 2022 to 2030, the consent management market based on key countries in Asia Pacific region is shown in the figure provided below:

Figure 49. Asia Pacific Consent Management Market Breakdown By Key Countries, 2022 And 2030 (%)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

Table 56. Asia Pacific Consent Management Market, by Country – Revenue and Forecast to 2030 (USD Million)

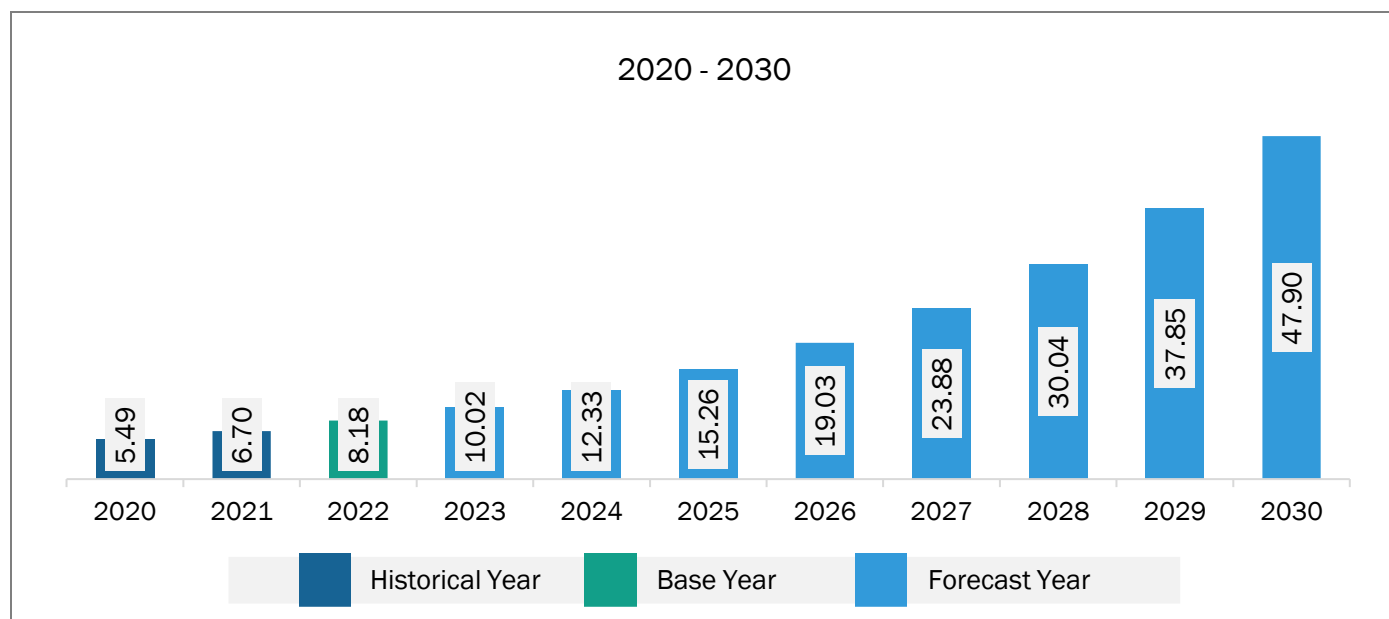
Country	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Australia	5.49	6.70	8.18	10.02	12.33	15.26	19.03	23.88	30.04	37.85	47.90	24.7%
China	17.10	20.10	23.63	27.83	32.91	39.14	46.88	56.48	68.18	82.37	99.88	19.7%
Japan	14.71	17.49	20.80	24.81	29.71	35.82	43.50	53.17	65.16	79.97	98.58	21.5%
India	9.59	11.92	14.80	18.42	22.99	28.88	36.51	46.43	59.17	75.48	96.66	26.4%
South Korea	12.30	14.87	17.98	21.81	26.57	32.59	40.26	50.07	62.44	77.99	97.86	23.6%
Rest of APAC	8.45	10.30	12.55	15.34	18.84	23.28	28.98	36.30	45.60	57.36	72.47	24.5%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market in China was worth US\$ 23.63 million in 2022 and is projected to reach US\$ 99.88 million by 2030; it is expected to grow at a CAGR of 19.7% from 2022 to 2030. The market in India is estimated to be worth US\$ 96.66 million by 2030 and is expected to grow at a CAGR of 26.4% during the 2022 - 2030 period.

10.3.6.1 Australia Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 50. Australia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in Australia was valued at US\$ 8.18 million in 2022 and is projected to reach US\$ 47.90 million by 2030; it is expected to grow at a CAGR of 24.7% during the forecast period.

The Australian government has implemented several new data privacy regulations, such as the Privacy Act 1988 and the Australian Privacy Principles. These regulations require businesses to obtain consent from individuals before collecting or using their personal data. The increasing use of digital marketing in Australia is driving the demand for consent management solutions. Businesses need to be able to collect and use personal data in order to target their marketing campaigns effectively.

Moreover, there is an increase in scams and breaching. For instance, in 2022, Australians lost a record amount of more than US\$ 3.1 billion to scams, up from the US\$ 2 billion lost in 2021, per the latest report from the Australian Competition and Consumer Commission. In addition, with the growing awareness of data privacy and the imposition of stringent regulations, businesses are expected to increase the adoption of consent management solutions in order to comply with the law and protect the privacy of their customers. Thus, the growth of the consent management market in Australia is expected to continue in the coming years.

10.3.6.1.1 Australia Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in Australia is shown in the table provided below:

Table 57. Australia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	4.20	5.14	6.29	7.73	9.53	11.83	14.78	18.60	23.46	29.64	37.61	25.0%
Services	1.29	1.56	1.89	2.30	2.80	3.43	4.24	5.28	6.58	8.21	10.30	23.6%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 6.29 million in 2022 and is projected to reach US\$ 37.61 million by 2030; it is expected to grow at a CAGR of 25.0% from 2022 to 2030.

Table 58. Australia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	2.75	3.39	4.16	5.13	6.36	7.92	9.95	12.57	15.92	20.19	25.72	25.6%
Cookie Management	1.44	1.75	2.13	2.59	3.17	3.90	4.84	6.03	7.55	9.45	11.88	24.0%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 4.16 million in 2022 and is projected to reach US\$ 25.72 million by 2030; it is expected to grow at a CAGR of 25.6% from 2022 to 2030.

10.3.6.1.2 Australia Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in Australia is shown in the table provided below:

Table 59. Australia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	1.70	2.03	2.43	2.90	3.49	4.21	5.12	6.26	7.67	9.40	11.56	21.5%
Cloud-based	3.78	4.67	5.76	7.12	8.84	11.05	13.91	17.62	22.38	28.46	36.34	25.9%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 5.76 million in 2022 and is projected to reach US\$ 36.34 million by 2030; it is expected to grow at a CAGR of 25.9% from 2022 to 2030.

10.3.6.1.3 Australia Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in Australia is shown in the table provided below:

Table 60. Australia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

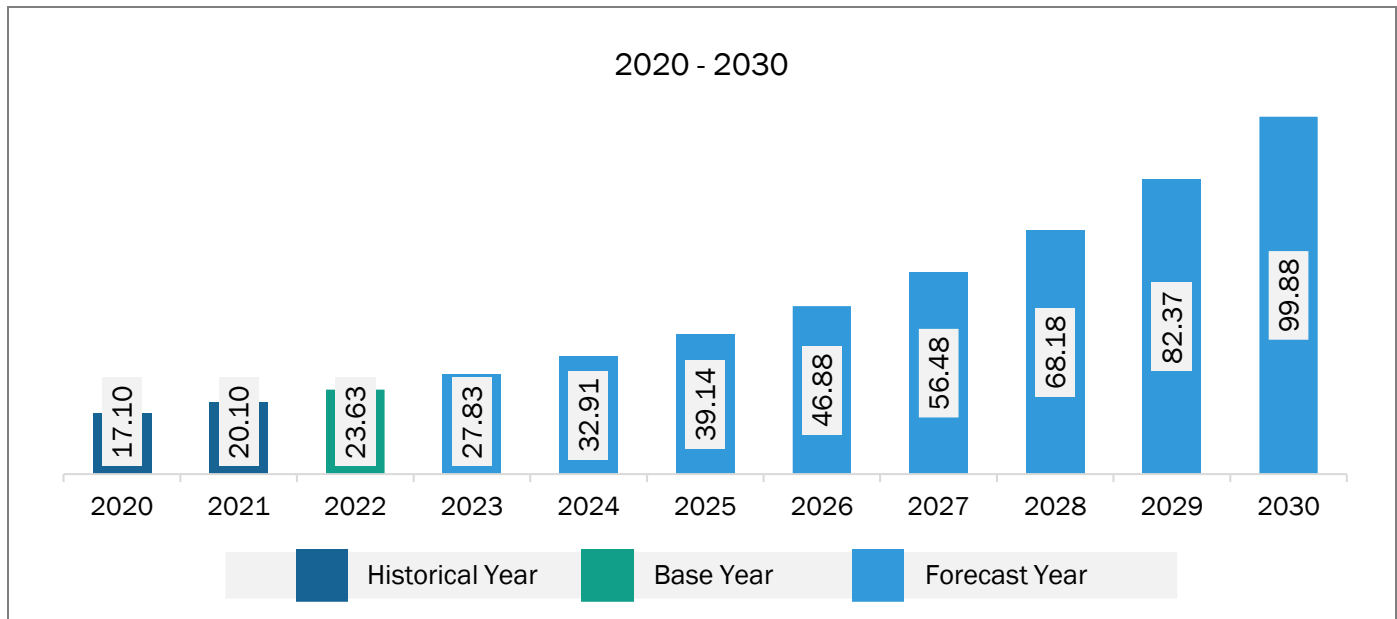
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	0.59	0.73	0.91	1.14	1.42	1.79	2.28	2.91	3.72	4.77	6.14	27.0%
Retail	0.68	0.83	1.02	1.25	1.55	1.93	2.41	3.04	3.85	4.87	6.20	25.3%
IT and Telecom	1.22	1.46	1.73	2.06	2.47	2.97	3.59	4.36	5.32	6.48	7.93	20.9%
BFSI	1.62	2.04	2.56	3.23	4.08	5.18	6.63	8.53	11.00	14.20	18.39	27.9%
Healthcare	0.64	0.77	0.91	1.09	1.30	1.56	1.89	2.31	2.81	3.43	4.20	21.1%
Education	0.31	0.37	0.45	0.54	0.66	0.80	0.99	1.22	1.51	1.87	2.33	22.8%
Media and Entertainment	0.23	0.27	0.33	0.39	0.47	0.57	0.69	0.85	1.04	1.27	1.57	21.8%
Others	0.20	0.23	0.27	0.32	0.38	0.46	0.55	0.66	0.79	0.95	1.15	19.7%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 2.56 million in 2022 and is projected to reach US\$ 18.39 million by 2030; it is expected to grow at a CAGR of 27.9% from 2022 to 2030.

10.3.6.2 China Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 51. China Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in China was valued at US\$ 23.63 million in 2022 and is projected to reach US\$ 99.88 million by 2030; it is expected to grow at a CAGR of 19.7% during the forecast period.

In August 2021, the standing committee of China's National People's Congress approved the country's complete data privacy law—the personal information protection law (PIPL), which was implemented on November 1, 2021. This law is similar to the size and scope of the EU's data protection regulation (GDPR); the PIPL imposes serious restrictions on how personal data can be collected, used, and managed. The PIPL will form a schedule that will create a strict compliance environment for the country's large-sized tech companies. It will also provide enhanced enforcement capabilities to the Chinese government.

Moreover, the new PIPL requires businesses across the globe that process information from China to obtain user consent and establish data mapping. In November 2021, the Chinese legislation launched new amendments outlining data processing requirements, such as passing a security assessment conducted by state authority, for companies based outside the country.

Further, China is facing several cases of data breaches. Several companies discovered a problem of bulk scraping of personal data from social networking sites and other public platforms in September 2020. It was found that, Zhenghua, a Chinese business with connections to Beijing's military and intelligence networks, released a massive database containing precise information on over 2.4 million people worldwide due to data scraping by unknown parties. Therefore, the consent management market is gaining traction in China due to emerging initiatives regarding data privacy and increasing cases of data breaches.

10.3.6.2.1 China Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in China is shown in the table provided below:

Table 61. China Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	12.84	15.14	17.85	21.09	25.01	29.85	35.85	43.32	52.46	63.57	77.31	20.1%
Services	4.26	4.96	5.77	6.74	7.89	9.30	11.03	13.15	15.72	18.81	22.57	18.6%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 17.85 million in 2022 and is projected to reach US\$ 77.31 million by 2030; it is expected to grow at a CAGR of 20.1% from 2022 to 2030.

Table 62. China Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	8.10	9.59	11.35	13.47	16.05	19.23	23.20	28.15	34.23	41.66	50.88	20.6%
Cookie Management	4.75	5.56	6.50	7.62	8.97	10.62	12.66	15.17	18.22	21.91	26.43	19.2%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 11.35 million in 2022 and is projected to reach US\$ 50.88 million by 2030; it is expected to grow at a CAGR of 20.6% from 2022 to 2030.

10.3.6.2.2 China Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in China is shown in the table provided below:

Table 63. China Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	5.70	6.56	7.55	8.70	10.06	11.70	13.68	16.10	18.96	22.34	26.40	16.9%
Cloud-based	11.40	13.54	16.08	19.13	22.85	27.45	33.20	40.38	49.22	60.03	73.48	20.9%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 16.08 million in 2022 and is projected to reach US\$ 73.48 million by 2030; it is expected to grow at a CAGR of 20.9% from 2022 to 2030.

10.3.6.2.3 China Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in China is shown in the table provided below:

Table 64. China Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

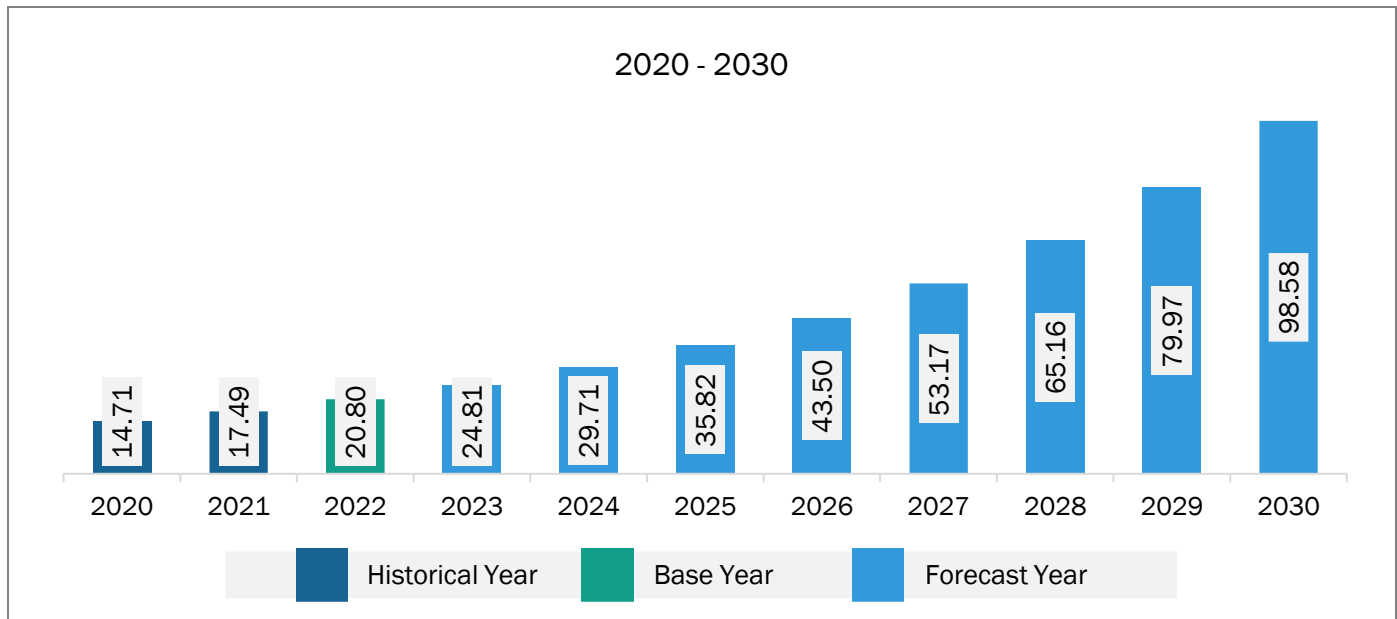
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	1.91	2.28	2.73	3.26	3.92	4.74	5.77	7.06	8.65	10.61	13.05	21.6%
Retail	2.27	2.68	3.16	3.74	4.44	5.30	6.37	7.71	9.34	11.33	13.80	20.2%
IT and Telecom	3.59	4.11	4.70	5.38	6.19	7.15	8.31	9.71	11.35	13.27	15.55	16.1%
BFSI	4.95	5.97	7.21	8.71	10.56	12.88	15.80	19.48	24.06	29.73	36.84	22.6%
Healthcare	1.90	2.18	2.49	2.86	3.30	3.82	4.45	5.21	6.11	7.17	8.42	16.4%
Education	1.10	1.28	1.48	1.73	2.02	2.37	2.80	3.34	3.98	4.74	5.68	18.3%
Media and Entertainment	0.78	0.90	1.04	1.20	1.39	1.63	1.91	2.26	2.68	3.17	3.77	17.5%
Others	0.62	0.71	0.82	0.94	1.08	1.25	1.46	1.71	2.01	2.36	2.77	16.5%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 7.21 million in 2022 and is projected to reach US\$ 36.84 million by 2030; it is expected to grow at a CAGR of 22.6% from 2022 to 2030.

10.3.6.3 Japan Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 52. Japan Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in Japan was valued at US\$ 20.80 million in 2022 and is projected to reach US\$ 98.58 million by 2030; it is expected to grow at a CAGR of 21.5% during the forecast period.

Japan is among the most technologically advanced countries in Asia Pacific and has widely incorporated data privacy and consent management solutions across many industries. The Japanese government launched its data protection and privacy law, i.e., the Act on Protection of Personal Information (APPI), which is implemented across industries to protect any issues associated with data breaches. Issues can also be generated due to the rise in cross-border data transfer, which is a conventional process among organizations in Japan.

The Japanese government has enacted several new regulations that are designed to strengthen data privacy protections, such as the Personal Information Protection Act (PIPA) and the Act on the Protection of Personal Information Related to the Provision of Electronic Communication Services. Further, in March 2023, the JFTC issued guidelines on the use of cookies and other tracking technologies, which emphasize the importance of obtaining user consent. In April 2023, the government announced its plans to introduce a new law that would require businesses to obtain explicit consent from users before collecting their personal data. As the country's data privacy regulations continue to evolve, and the use of digital technologies continues to grow, the demand for consent management solutions is likely to remain strong in the coming years. Thus, the increasing demand for consent management solutions is expected to boost the growth of the consent management market during the forecast period.

10.3.6.3.1 Japan Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in Japan is shown in the table provided below:

Table 65. Japan Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	10.96	13.07	15.58	18.64	22.39	27.06	32.96	40.40	49.64	61.09	75.51	21.8%
Services	3.75	4.42	5.22	6.17	7.33	8.76	10.55	12.78	15.52	18.88	23.07	20.4%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 15.58 million in 2022 and is projected to reach US\$ 75.51 million by 2030; it is expected to grow at a CAGR of 21.8% from 2022 to 2030.

Table 66. Japan Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	6.97	8.34	10.00	12.01	14.48	17.58	21.51	26.47	32.67	40.37	50.11	22.3%
Cookie Management	3.99	4.72	5.59	6.63	7.90	9.48	11.45	13.92	16.97	20.72	25.40	20.8%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 10.00 million in 2022 and is projected to reach US\$ 50.11 million by 2030; it is expected to grow at a CAGR of 22.3% from 2022 to 2030.

10.3.6.3.2 Japan Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in Japan is shown in the table provided below:

Table 67. Japan Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	4.59	5.42	6.39	7.57	9.00	10.76	12.97	15.73	19.13	23.30	28.49	20.5%
Cloud-based	10.12	12.07	14.41	17.24	20.72	25.06	30.53	37.44	46.03	56.68	70.09	21.9%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 14.41 million in 2022 and is projected to reach US\$ 70.09 million by 2030; it is expected to grow at a CAGR of 21.9% from 2022 to 2030.

10.3.6.3.3 Japan Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on End-use Industry in Japan is shown in the table provided below:

Table 68. Japan Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

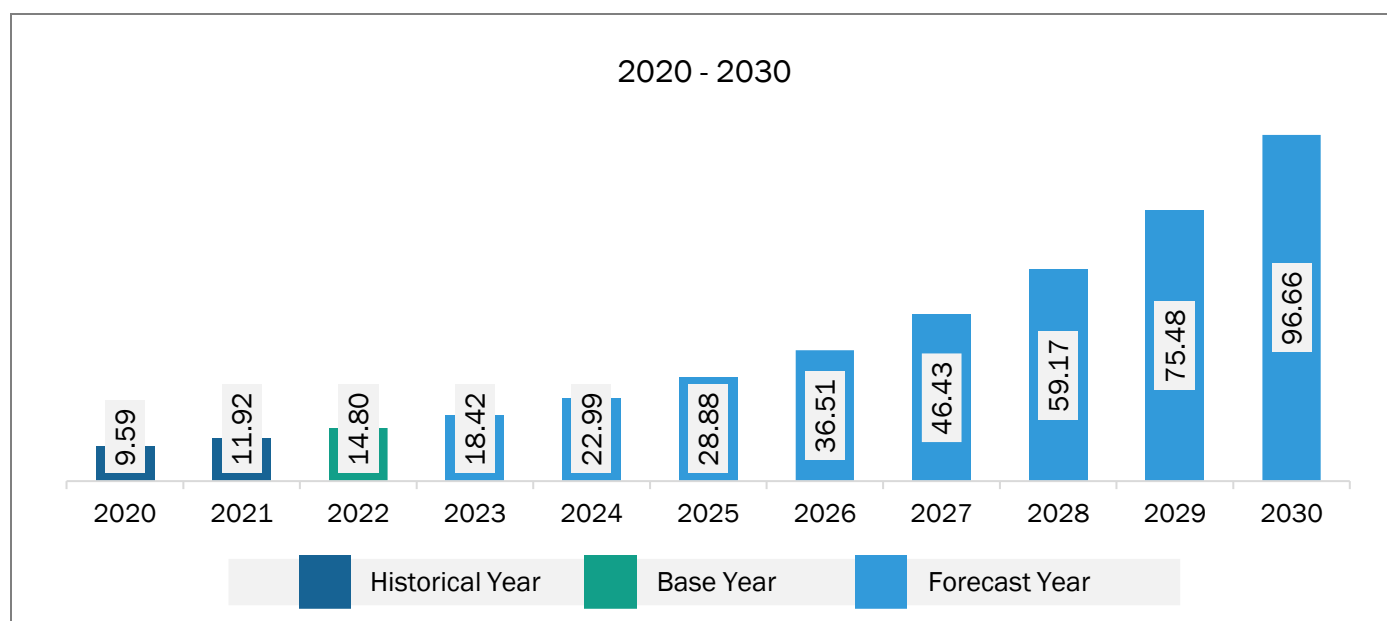
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	1.63	1.98	2.39	2.91	3.55	4.35	5.38	6.68	8.33	10.39	13.02	23.6%
Retail	1.92	2.29	2.73	3.28	3.94	4.77	5.82	7.15	8.80	10.85	13.44	22.0%
IT and Telecom	3.20	3.70	4.28	4.95	5.75	6.72	7.90	9.34	11.06	13.09	15.55	17.5%
BFSI	4.17	5.12	6.27	7.70	9.49	11.75	14.66	18.39	23.11	29.07	36.71	24.7%
Healthcare	1.66	1.92	2.22	2.58	3.00	3.51	4.14	4.90	5.81	6.89	8.21	17.7%
Education	0.93	1.09	1.28	1.51	1.78	2.12	2.54	3.06	3.69	4.47	5.43	19.8%
Media and Entertainment	0.67	0.78	0.91	1.06	1.25	1.47	1.75	2.10	2.51	3.01	3.63	18.9%
Others	0.53	0.61	0.71	0.82	0.96	1.12	1.32	1.56	1.85	2.19	2.60	17.6%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 6.27 million in 2022 and is projected to reach US\$ 36.71 million by 2030; it is expected to grow at a CAGR of 24.7% from 2022 to 2030.

10.3.6.4 India Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 53. India Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in India was valued at US\$ 14.80 million in 2022 and is projected to reach US\$ 96.66 million by 2030; it is expected to grow at a CAGR of 26.4% during the forecast period.

India is one of the fastest-growing countries in terms of the adoption of advanced technology across various industries. The digital revolution is taking place at a rapid pace in India, as the government announced its plan to implement the “Digital India” initiative. The companies are focusing on the expansion of their business internationally, which requires the transfer of data across borders. This increases the chances of data breaches. Because of this, the Indian government is focusing on establishing its data privacy law and has taken some initial steps to achieve this goal. In 2022, the Ministry of Electronics and Information Technology (MeitY) of India released a draft of the Digital Personal Data Protection Bill, which introduced a new framework for personal data protection. Through this bill, the government of India aimed to frame the rights and duties of the citizen and the obligations to use collected data lawfully.

Moreover, businesses in the Indian financial sector have been aggregating financial data from financial institutions, government bodies, and business entities and presenting it to a customer or a third party, such as a financial intermediary, on a single platform. These companies, known as “account aggregators,” collect, manage, and present consent instead of the individuals whose data is being used. A standardized “consent artefact” is used to handle consent; it is a document that contains information required for providing informed consent (such as the purpose of collection, disclosure of third parties with whom data must be shared, etc.). Therefore, the establishment of such companies is expected to create new growth opportunities for the consent management market in India during the forecast period.

10.3.6.4.1 India Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in the UK is shown in the table provided below:

Table 69. India Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	7.63	9.50	11.82	14.73	18.44	23.21	29.40	37.47	47.85	61.16	78.49	26.7%
Services	1.97	2.42	2.98	3.68	4.56	5.67	7.11	8.97	11.33	14.32	18.17	25.3%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 11.82 million in 2022 and is projected to reach US\$ 78.49 million by 2030; it is expected to grow at a CAGR of 26.7% from 2022 to 2030.

Table 70. India Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	4.94	6.17	7.72	9.66	12.14	15.35	19.53	24.99	32.04	41.13	53.00	27.2%
Cookie Management	2.69	3.32	4.10	5.07	6.30	7.86	9.88	12.48	15.81	20.03	25.49	25.7%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 7.72 million in 2022 and is projected to reach US\$ 53.00 million by 2030; it is expected to grow at a CAGR of 27.2% from 2022 to 2030.

10.3.6.4.2 India Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in the UK is shown in the table provided below:

Table 71. India Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	3.02	3.68	4.46	5.43	6.62	8.11	10.00	12.40	15.39	19.11	23.81	23.3%
Cloud-based	6.57	8.24	10.34	12.99	16.38	20.77	26.51	34.04	43.78	56.37	72.85	27.6%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 10.34 million in 2022 and is projected to reach US\$ 72.85 million by 2030; it is expected to grow at a CAGR of 27.6% from 2022 to 2030.

10.3.6.4.3 India Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in the UK is shown in the table provided below:

Table 72. India Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

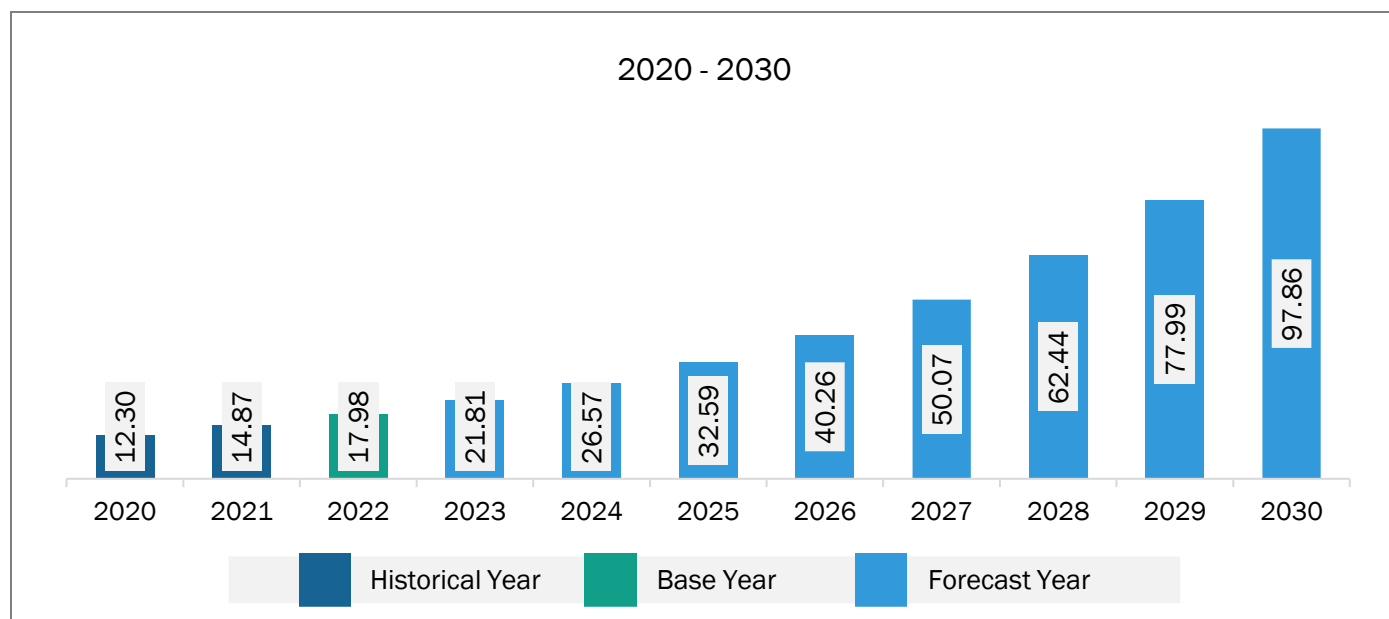
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	1.00	1.27	1.61	2.04	2.60	3.32	4.28	5.54	7.19	9.33	12.15	28.8%
Retail	1.21	1.52	1.89	2.36	2.97	3.74	4.75	6.07	7.78	9.96	12.82	27.0%
IT and Telecom	2.12	2.57	3.10	3.75	4.54	5.54	6.79	8.36	10.31	12.71	15.71	22.5%
BFSI	2.80	3.58	4.58	5.86	7.52	9.69	12.58	16.41	21.44	28.01	36.73	29.7%
Healthcare	1.15	1.39	1.69	2.04	2.48	3.04	3.73	4.61	5.70	7.04	8.73	22.8%
Education	0.56	0.69	0.84	1.03	1.27	1.57	1.95	2.44	3.06	3.85	4.85	24.5%
Media and Entertainment	0.41	0.50	0.60	0.73	0.90	1.10	1.36	1.69	2.10	2.62	3.27	23.5%
Others	0.34	0.42	0.50	0.60	0.72	0.88	1.07	1.31	1.60	1.96	2.41	21.7%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 4.58 million in 2022 and is projected to reach US\$ 36.73 million by 2030; it is expected to grow at a CAGR of 29.7% from 2022 to 2030.

10.3.6.5 South Korea Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 54. South Korea Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in South Korea was valued at US\$ 17.98 million in 2022 and is projected to reach US\$ 97.86 million by 2030; it is expected to grow at a CAGR of 23.6% during the forecast period.

The South Korean government is rapidly establishing data protection laws for data protection. The Personal Information Protection Act (PIPA) creates a direct impact on every business in the country as well as on enterprises conducting business in cooperation with the citizens of South Korea. The PIPA levies strict compliance on enterprises that collect varied information. These laws state details regarding personal information, when consent is required, how the data can be processed, and the legal rights of the data subject. Additionally, South Korea is a highly digitalized country, with a high penetration of smartphones and other connected devices. This has led to a greater volume of personal data being collected and used by businesses. Hence, the demand for consent management solutions is increasing in South Korea.

Under the country's Constitution, the Republic of Korea, South Korea, recognizes privacy rights such as communication and freedom of expression as essential rights. South Korea has extensive data protection laws and regulations. The Personal Information Protection Act PIPA (amended in 2020) establishes strict guidelines for the collection, use, disclosure, and other processing of personal information by government agencies, commercial companies, and people. South Korea has established stringent criteria for managing personal data under the PIPA, with agreement from the data subject required at practically every step.

A few instances that contributed to the traction of the consent management market in South Korea are mentioned below:

- In September 2022, the South Korean government fined Google and Facebook a combined US\$ 71.8 million for violating the PIPA. This fine highlighted the importance of compliance with data privacy regulations in South Korea and led to increased demand for consent management solutions.

- In March 2023, the South Korean government announced that it would be introducing a new data privacy law, the Personal Information Protection Act (Revised). This new law is expected to further strengthen data privacy protections in South Korea and is likely to lead to greater demand for consent management solutions.

Businesses in the country must ensure that they are compliant with data privacy regulations, which can be achieved by incorporating consent management solutions that can help businesses to achieve compliance and build trust with their customers.

10.3.6.5.1 South Korea Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in South Korea is shown in the table provided below:

Table 73. South Korea Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	9.57	11.57	14.00	16.98	20.69	25.38	31.37	39.02	48.68	60.82	76.33	23.6%
Services	2.73	3.30	3.99	4.83	5.88	7.20	8.89	11.04	13.76	17.17	21.53	23.5%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 14.00 million in 2022 and is projected to reach US\$ 76.33 million by 2030; it is expected to grow at a CAGR of 23.6% from 2022 to 2030.

Table 74. South Korea Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	6.15	7.47	9.08	11.06	13.54	16.68	20.70	25.85	32.38	40.63	51.21	24.1%
Cookie Management	3.42	4.10	4.92	5.92	7.16	8.71	10.68	13.17	16.29	20.19	25.12	22.6%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 9.08 million in 2022 and is projected to reach US\$ 51.21 million by 2030; it is expected to grow at a CAGR of 24.1% from 2022 to 2030.

10.3.6.5.2 South Korea Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in South Korea is shown in the table provided below:

Table 75. South Korea Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	3.99	4.78	5.73	6.90	8.33	10.13	12.42	15.31	18.93	23.44	29.16	22.5%
Cloud-based	8.31	10.09	12.25	14.91	18.24	22.45	27.84	34.76	43.51	54.55	68.70	24.0%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 12.25 million in 2022 and is projected to reach US\$ 68.70 million by 2030; it is expected to grow at a CAGR of 24.0% from 2022 to 2030.

10.3.6.5.3 South Korea Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in South Korea is shown in the table provided below:

Table 76. South Korea Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

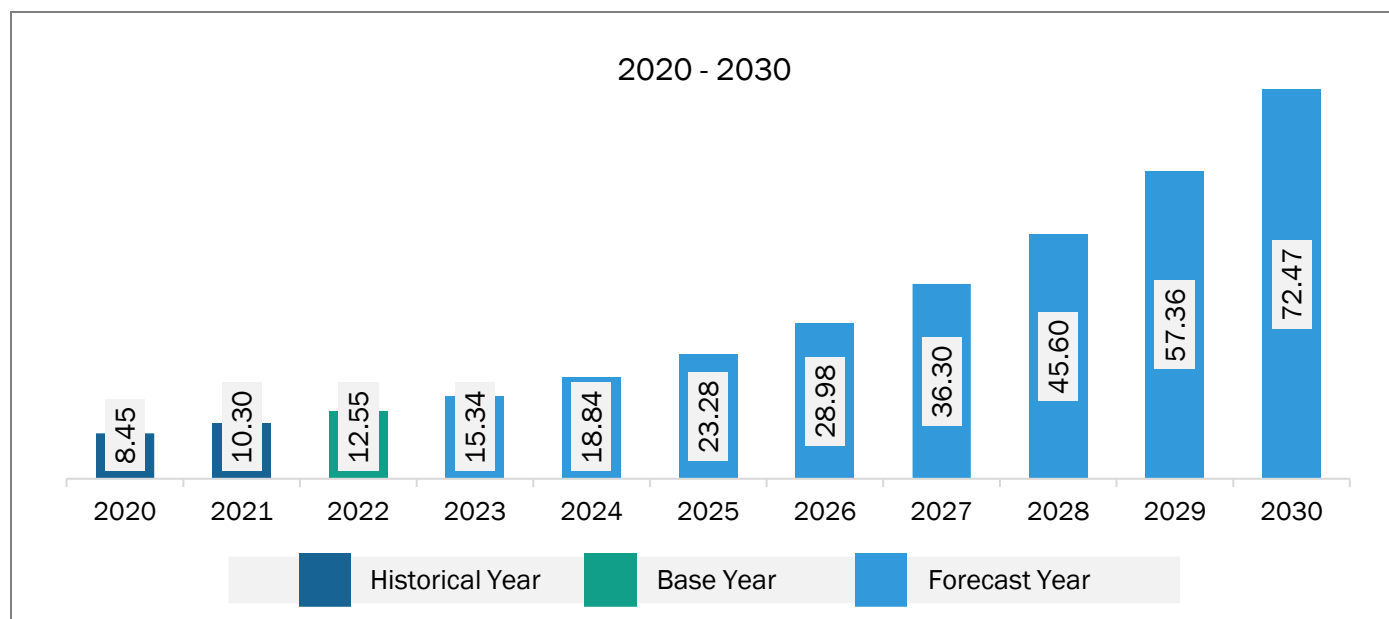
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	1.39	1.71	2.10	2.60	3.22	4.02	5.05	6.39	8.10	10.28	13.11	25.7%
Retail	1.58	1.91	2.32	2.83	3.47	4.27	5.30	6.62	8.30	10.41	13.12	24.2%
IT and Telecom	2.70	3.17	3.73	4.40	5.20	6.19	7.41	8.92	10.76	12.98	15.71	19.7%
BFSI	3.53	4.40	5.48	6.84	8.56	10.79	13.69	17.47	22.34	28.59	36.74	26.9%
Healthcare	1.37	1.62	1.90	2.24	2.65	3.16	3.78	4.56	5.50	6.64	8.04	19.7%
Education	0.76	0.90	1.08	1.29	1.55	1.88	2.28	2.80	3.44	4.23	5.23	21.8%
Media and Entertainment	0.53	0.63	0.75	0.89	1.06	1.28	1.54	1.87	2.28	2.78	3.41	20.8%
Others	0.45	0.52	0.61	0.72	0.85	1.01	1.20	1.44	1.73	2.07	2.49	19.2%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 5.48 million in 2022 and is projected to reach US\$ 36.74 million by 2030; it is expected to grow at a CAGR of 26.9% from 2022 to 2030.

10.3.6.6 Rest of Asia Pacific Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 55. Rest of Asia Pacific Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in Rest of Asia Pacific was valued at US\$ 12.55 million in 2022 and is projected to reach US\$ 72.47 million by 2030; it is expected to grow at a CAGR of 24.5% during the forecast period.

The Rest of Asia Pacific (APAC) consent management market is segmented into Singapore, the Philippines, and Hong Kong. The region recorded a rise in technological advancements. Approximately 60% of the world's population lives in Asia Pacific, which majorly faces concerns related to data privacy. Countries in the Rest of APAC are reevaluating the policies and procedures of data protection. For instance, in Singapore, a new set of laws for personal data protection were enacted. There is a growing concern about the protection of the personal data of the employee as well as the customer in the organization due to the continuous growth in digitalization. Hence, the government has launched various initiatives for the protection of personal confidential information across the region, which is increasing the adoption of consent management solutions. The country's data privacy law not only applies penalties but also imposes criminal and regulatory fines, along with imprisonment, to the organization for lack of adherence towards compliance with data privacy.

10.3.6.6.1 Rest of Asia Pacific Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in Rest of Asia Pacific is shown in the table provided below:

Table 77. Rest of Asia Pacific Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	6.95	8.51	10.41	12.77	15.74	19.52	24.39	30.66	38.66	48.81	61.89	25.0%
Services	1.50	1.79	2.14	2.57	3.10	3.76	4.59	5.64	6.94	8.55	10.58	22.1%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 10.41 million in 2022 and is projected to reach US\$ 61.89 million by 2030; it is expected to grow at a CAGR of 25.0% from 2022 to 2030.

Table 78. Rest of Asia Pacific Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	4.64	5.70	7.00	8.63	10.67	13.29	16.68	21.05	26.65	33.78	43.01	25.5%
Cookie Management	2.31	2.81	3.41	4.14	5.06	6.23	7.71	9.61	12.01	15.02	18.88	23.9%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 7.00 million in 2022 and is projected to reach US\$ 43.01 million by 2030; it is expected to grow at a CAGR of 25.5% from 2022 to 2030.

10.3.6.6.2 Rest of Asia Pacific Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in Rest of Asia Pacific is shown in the table provided below:

Table 79. Rest of Asia Pacific Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	2.62	3.12	3.72	4.44	5.32	6.42	7.79	9.51	11.63	14.23	17.48	21.3%
Cloud-based	5.83	7.17	8.83	10.90	13.51	16.86	21.19	26.79	33.97	43.13	54.99	25.7%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 8.83 million in 2022 and is projected to reach US\$ 54.99 million by 2030; it is expected to grow at a CAGR of 25.7% from 2022 to 2030.

10.3.6.6.3 Rest of Asia Pacific Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in Rest of Asia Pacific is shown in the table provided below:

Table 80. Rest of Asia Pacific Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	1.01	1.25	1.56	1.93	2.42	3.03	3.84	4.89	6.23	7.96	10.22	26.5%
Retail	1.02	1.25	1.53	1.87	2.31	2.87	3.59	4.52	5.71	7.22	9.16	25.1%
IT and Telecom	1.87	2.22	2.64	3.14	3.74	4.49	5.42	6.58	8.00	9.74	11.88	20.7%
BFSI	2.47	3.10	3.89	4.89	6.17	7.84	10.01	12.86	16.56	21.34	27.60	27.7%
Healthcare	0.98	1.16	1.38	1.64	1.96	2.36	2.85	3.46	4.21	5.13	6.26	20.8%
Education	0.47	0.57	0.68	0.82	0.99	1.20	1.47	1.81	2.24	2.77	3.45	22.5%
Media and Entertainment	0.34	0.40	0.48	0.57	0.69	0.83	1.00	1.23	1.50	1.84	2.26	21.4%
Others	0.29	0.34	0.40	0.47	0.56	0.66	0.79	0.95	1.14	1.36	1.64	19.2%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 3.89 million in 2022 and is projected to reach US\$ 27.60 million by 2030; it is expected to grow at a CAGR of 27.7% from 2022 to 2030.

10.4 Middle East & Africa

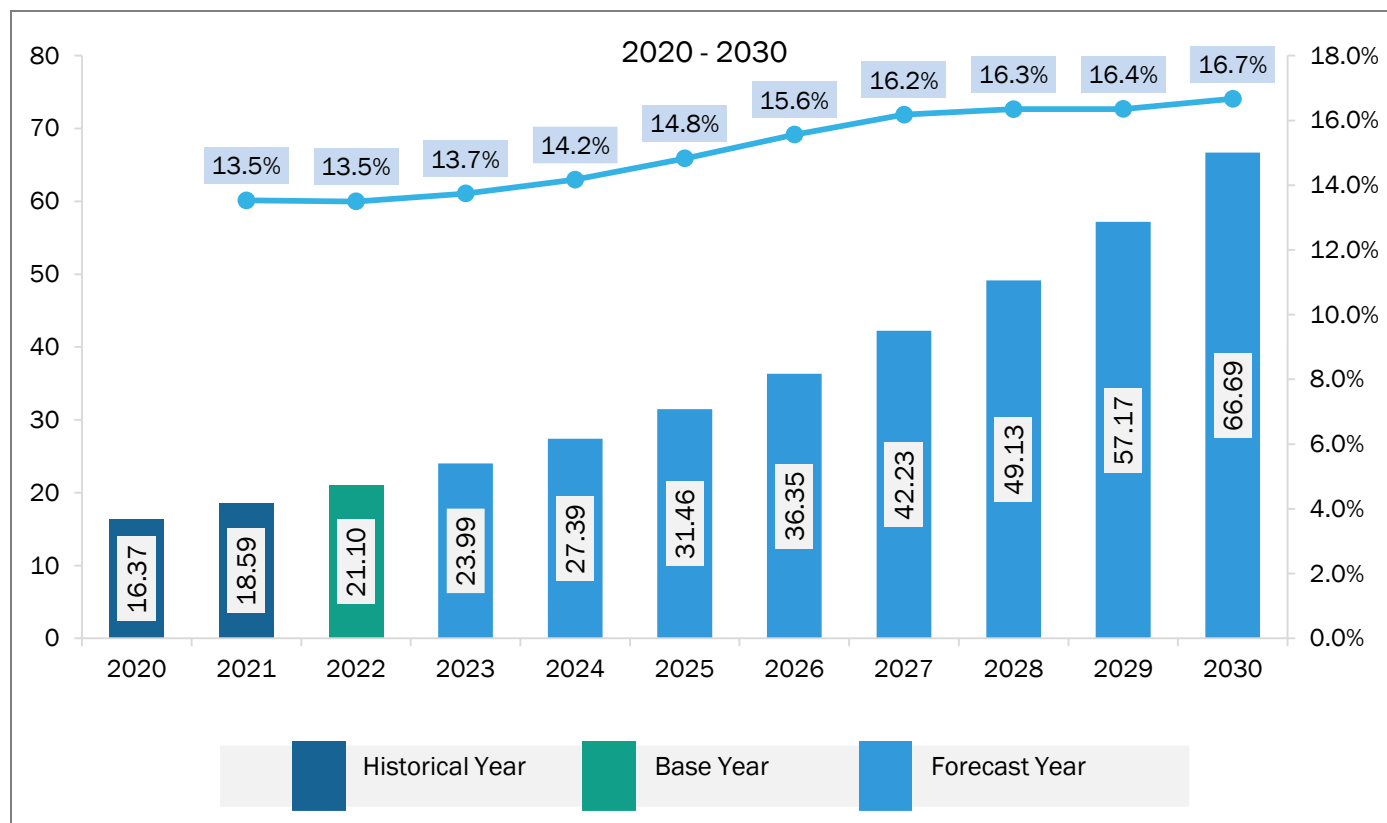
10.4.1 Middle East & Africa Consent Management Market Overview

The Middle East and Africa (MEA) consent management market is segmented into South Africa, the UAE, Saudi Arabia, and the Rest of MEA. The rise in advancements related to digital transformation and data security solutions is increasing the adoption of the cloud, which is also raising concerns about cyberattacks and data breaches. Also, the region is increasingly adopting advanced technologies and digital media in various industries, including healthcare. Further, the region is witnessing the growing adoption of telehealth. According to the International Trade Administration, the telehealth adoption rate in Saudi Arabia is approximately 70%, and ~34% of young physicians are using digital technologies to facilitate diagnoses. Thus, the growing adoption of telehealth is increasing the need for consent management solutions to protect the personal data of citizens. Hence, governments of various countries in the region have implemented various rules and regulations for citizens' data protection. In the UAE, the law governing the data privacy of the citizens is Federal Law No. 2 of 2019 on the Protection of Personal Data, the Data Protection Law. Further, the UAE Data Protection Law is similar to the EU's GDPR. This law applies to any entity that processes personal data, including government bodies, companies, and individuals. Similarly, the Saudi Arabian government's Personal Data Protection Law (PDPL) is implemented to protect individuals' personal data privacy and regulate organizations' collection, processing, disclosure, or retention of personal data. Thus, such regulation by the government is expected to propel the growth of the consent management market in the MEA. Furthermore, governments of many countries in the region are recognizing the potential of implementing ICT technologies in various industry verticals to improve the socio-economic ecosystem of the region. Saudi Arabia is becoming a major adopter of digital payment systems, owing to the country's potential to become a digital economy. In addition, the digitization in Bahrain, Qatar, and Iran are the other few Gulf countries is also increasing. Thus, the growing digitization in the region is also increasing concern for privacy and data protection, which is expected to raise the demand for consent management solutions during the forecast period.

10.4.2 Middle East & Africa Consent Management Market Revenue and Forecasts to 2030 (US\$ Million)

Consent management Market accounted for US\$ 21.10 million in the year 2022 and it is expected to grow at a CAGR of 15.5% during the forecast period, to reach US\$ 66.69 million in the year 2030.

Figure 56. Consent Management Market Revenue and Forecasts To 2030 (US\$ Million)

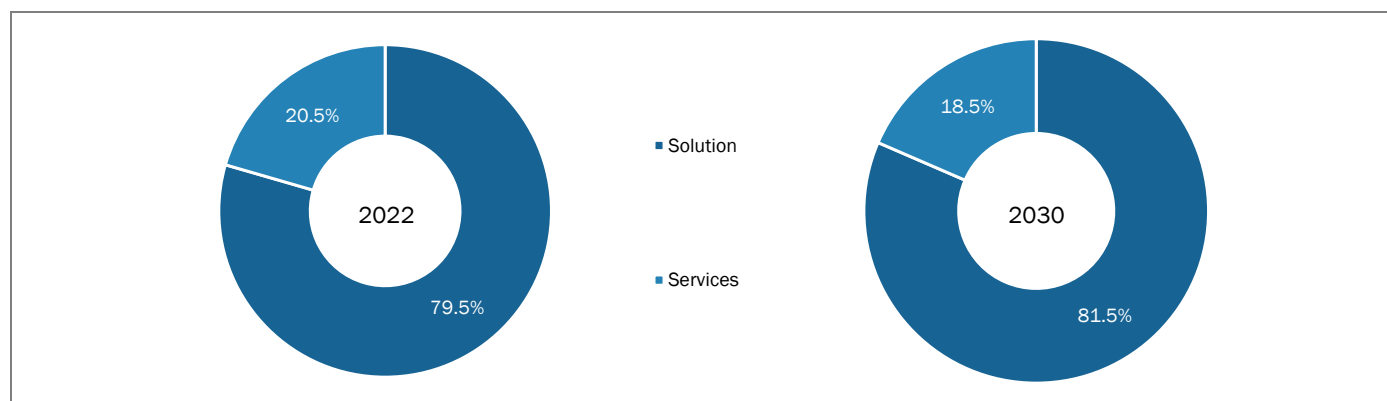


Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

10.4.3 Middle East & Africa Consent Management Market Breakdown by Component

The consent management market was dominated by the solution segment, which accounted to 79.5% in 2022 and is estimated to account for 81.5% market revenue share by 2030.

Figure 57. Middle East & Africa Consent Management Market Breakdown by Component (2022 and 2030)



10.4.3.1 Middle East & Africa Consent Management Market and Forecasts and Analysis - By Component

Table 81. Middle East & Africa Consent Management Market Revenue and Forecasts To 2030 (US\$ Million) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	12.93	14.73	16.77	19.13	21.91	25.24	29.25	34.09	39.79	46.44	54.35	15.8%
Services	3.44	3.86	4.33	4.86	5.48	6.22	7.09	8.14	9.34	10.72	12.34	14.0%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 16.77 million in 2022 and is projected to reach US\$ 54.35 million by 2030; it is expected to grow at a CAGR of 15.8% from 2022 to 2030.

Table 82. Middle East & Africa Consent Management Market Revenue and Forecasts To 2030 (US\$ Million) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	8.38	9.58	10.96	12.56	14.44	16.70	19.44	22.75	26.67	31.25	36.73	16.3%
Cookie Management	4.55	5.14	5.81	6.58	7.47	8.53	9.81	11.34	13.12	15.19	17.62	14.9%

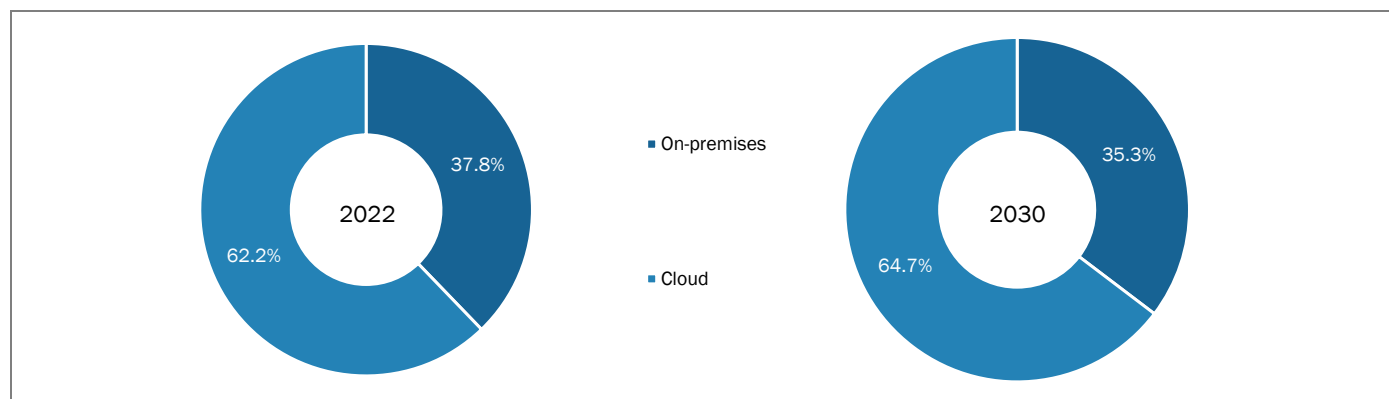
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 10.96 million in 2022 and is projected to reach US\$ 36.73 million by 2030; it is expected to grow at a CAGR of 16.3% from 2022 to 2030.

10.4.4 Middle East & Africa Consent Management Market Breakdown by Deployment

The consent management market was dominated by the cloud-based segment, which accounted to 62.2% in 2022 and is estimated to account for 64.7% market revenue share by 2030.

Figure 58. Middle East & Africa Consent Management Market Breakdown by Deployment (2022 and 2030)



10.4.4.1 Middle East & Africa Consent Management Market and Forecasts and Analysis - By Deployment

Table 83. Middle East & Africa Consent Management Market Revenue and Forecasts To 2030 (US\$ Million) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	6.29	7.08	7.97	8.99	10.18	11.59	13.28	15.30	17.66	20.37	23.56	14.5%
Cloud-based	10.08	11.50	13.12	15.00	17.21	19.86	23.07	26.93	31.48	36.80	43.13	16.0%

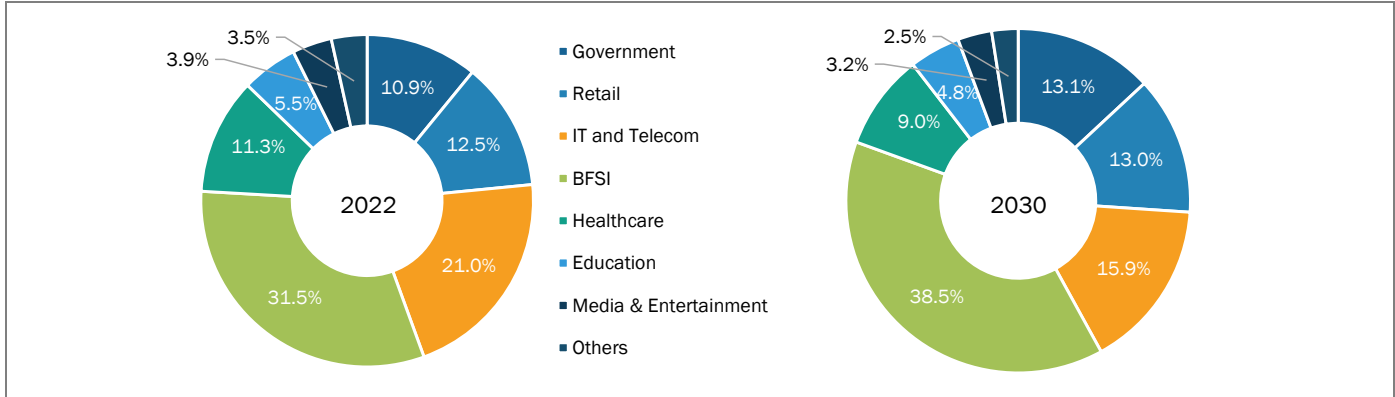
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 13.12 million in 2022 and is projected to reach US\$ 43.13 million by 2030; it is expected to grow at a CAGR of 16.0% from 2022 to 2030.

10.4.5 Middle East & Africa Consent Management Market Breakdown by End-use Industry

The consent management market was dominated by the BFSI segment, which accounted to 31.5% in 2022 and is estimated to account for 38.5% market revenue share by 2030.

Figure 59. Middle East & Africa Consent Management Market Breakdown by End-use Industry (2022 and 2030)



10.4.5.1 Middle East & Africa Consent Management Market and Forecasts and Analysis - By End-use Industry

Table 84. Middle East & Africa Consent Management Market Revenue and Forecasts To 2030 (US\$ Million) – By End-use Industry

End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	1.70	1.98	2.30	2.68	3.14	3.69	4.36	5.18	6.16	7.32	8.72	18.1%
Retail	2.03	2.32	2.64	3.02	3.46	3.99	4.64	5.41	6.33	7.39	8.66	16.0%
IT and Telecom	3.64	4.02	4.43	4.89	5.41	6.01	6.72	7.54	8.46	9.48	10.63	11.6%
BFSI	4.86	5.68	6.64	7.76	9.10	10.73	12.72	15.15	18.07	21.53	25.70	18.4%
Healthcare	1.95	2.16	2.39	2.65	2.94	3.28	3.69	4.16	4.70	5.30	5.99	12.2%
Education	0.92	1.03	1.15	1.29	1.45	1.64	1.86	2.13	2.44	2.79	3.20	13.6%
Media and Entertainment	0.66	0.73	0.81	0.90	1.01	1.13	1.28	1.45	1.65	1.87	2.13	12.8%
Others	0.61	0.67	0.73	0.80	0.88	0.97	1.08	1.20	1.34	1.49	1.65	10.7%

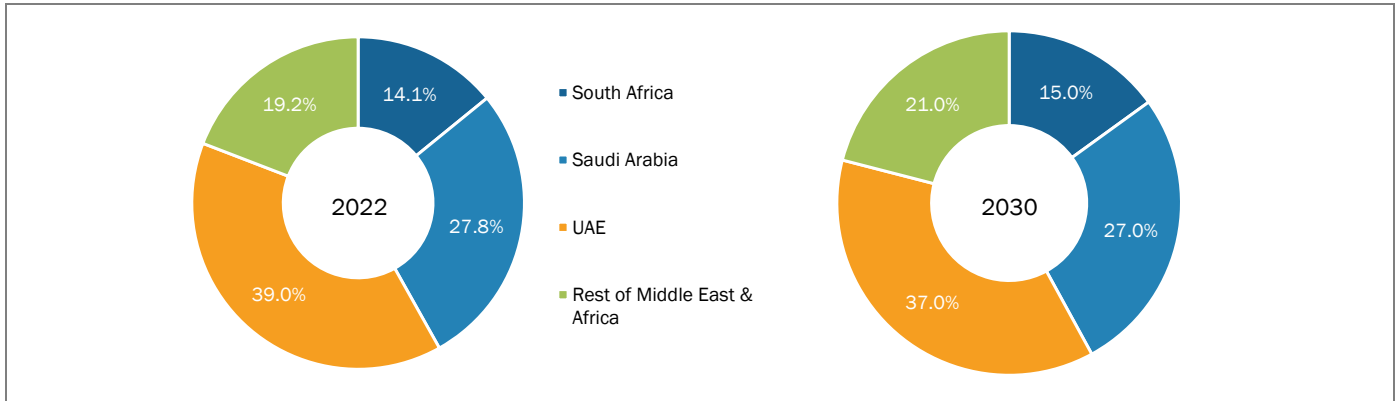
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 6.64 million in 2022 and is projected to reach US\$ 25.70 million by 2030; it is expected to grow at a CAGR of 18.4% from 2022 to 2030.

10.4.6 Middle East & Africa Consent Management Market Revenue and Forecasts and Analysis - By Countries

The consent management market was dominated by the UAE, which accounted to 39.0% in 2022 and is estimated to account for 37.0% market revenue share by 2030. For the years 2022 to 2030, the consent management market based on key countries in Middle East & Africa region is shown in the figure provided below:

Figure 60. Consent Management Market Breakdown by Key Countries, 2022 and 2030 (%)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

Table 85. Middle East and Africa Consent Management Market, by Country – Revenue and Forecast to 2030 (USD Million)

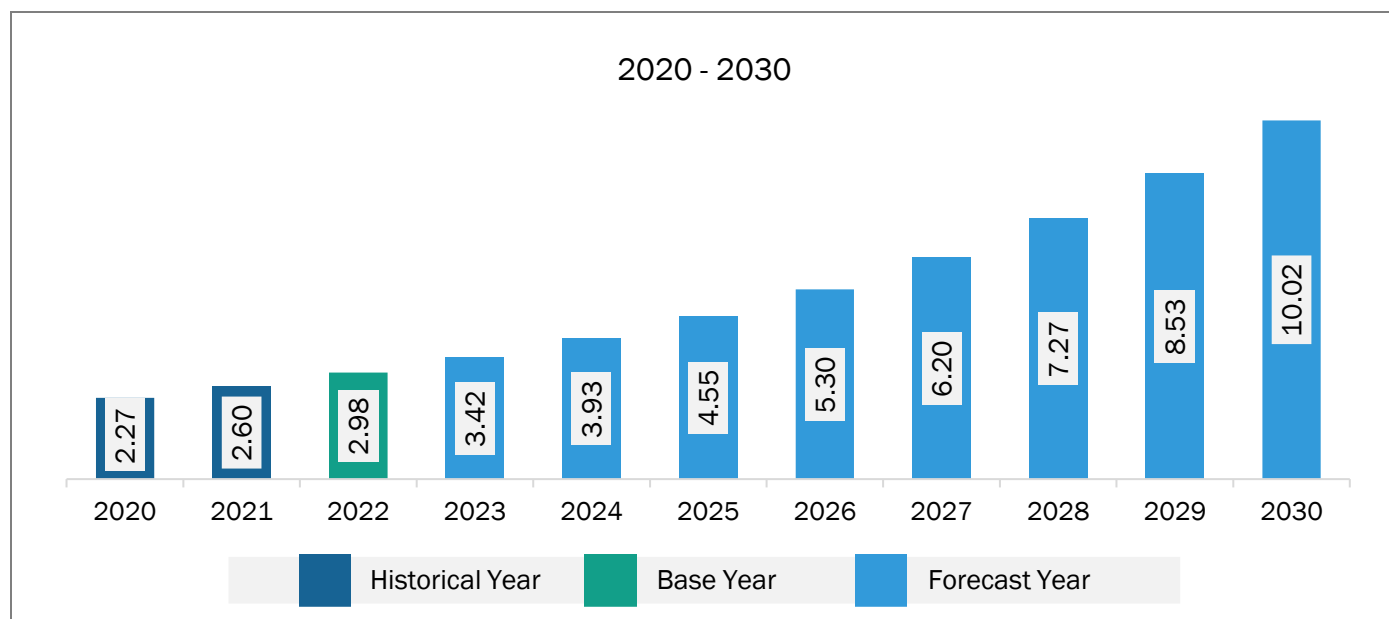
Country	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
South Africa	2.27	2.60	2.98	3.42	3.93	4.55	5.30	6.20	7.27	8.53	10.02	16.4%
Saudi Arabia	4.57	5.18	5.86	6.64	7.55	8.64	9.95	11.52	13.36	15.49	18.01	15.1%
United Arab Emirates	6.46	7.29	8.22	9.29	10.54	12.02	13.80	15.93	18.41	21.28	24.66	14.7%
Rest of Middle East and Africa	3.06	3.52	4.04	4.65	5.37	6.24	7.29	8.57	10.08	11.86	13.99	16.8%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market in United Arab Emirates was worth US\$ 8.22 million in 2022 and is projected to reach US\$ 24.66 million by 2030; it is expected to grow at a CAGR of 14.7% from 2022 to 2030. The market in Rest of Middle East and Africa is estimated to be worth US\$ 13.99 million by 2030 and is expected to grow at a CAGR of 16.8% during the 2022 - 2030 period.

10.4.6.1 South Africa Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 61. South Africa Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in South Africa was valued at US\$ 2.98 million in 2022 and is projected to reach US\$ 10.02 million by 2030; it is expected to grow at a CAGR of 16.4% during the forecast period.

The Protection of Personal Information Act of South Africa is a 12-chapter framework that was passed in 2013 to control the management of personal data. The regulatory environment in South Africa is complex and impacts all facets of a business. Also, South Africa has a continually evolving compliance landscape that poses a challenge to various companies; hence, companies must abide by new EU regulations.

Further, POPIA governs cross-border data transfers when a responsible party in South Africa sends personal information to another nation for processing. POPIA applies to any personal information processed in South Africa, regardless of the data subject's location. Adhering to such stringent regulations requires various consent management solutions for businesses to function properly without violating data privacy laws. This is boosting the demand for consent management solutions, thus driving the consent management market in South Africa.

10.4.6.1.1 South Africa Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in South Africa is shown in the table provided below:

Table 86. South Africa Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	1.82	2.09	2.40	2.76	3.19	3.71	4.34	5.10	6.00	7.07	8.34	16.8%
Services	0.46	0.51	0.58	0.65	0.74	0.84	0.96	1.10	1.27	1.46	1.68	14.3%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 2.40 million in 2022 and is projected to reach US\$ 8.34 million by 2030; it is expected to grow at a CAGR of 16.8% from 2022 to 2030.

Table 87. South Africa Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	1.19	1.37	1.58	1.83	2.12	2.48	2.91	3.43	4.06	4.80	5.68	17.3%
Cookie Management	0.63	0.72	0.82	0.93	1.07	1.23	1.43	1.67	1.95	2.27	2.66	15.9%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 1.58 million in 2022 and is projected to reach US\$ 5.68 million by 2030; it is expected to grow at a CAGR of 17.3% from 2022 to 2030.

10.4.6.1.2 South Africa Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in South Africa is shown in the table provided below:

Table 88. South Africa Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	1.53	1.77	2.04	2.35	2.73	3.18	3.73	4.39	5.19	6.12	7.25	17.2%
Cloud-based	0.74	0.84	0.94	1.06	1.20	1.37	1.57	1.81	2.09	2.40	2.78	14.5%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the on-premises segment was worth US\$ 2.04 million in 2022 and is projected to reach US\$ 7.25 million by 2030; it is expected to grow at a CAGR of 17.2% from 2022 to 2030.

10.4.6.1.3 South Africa Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in South Africa is shown in the table provided below:

Table 89. South Africa Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

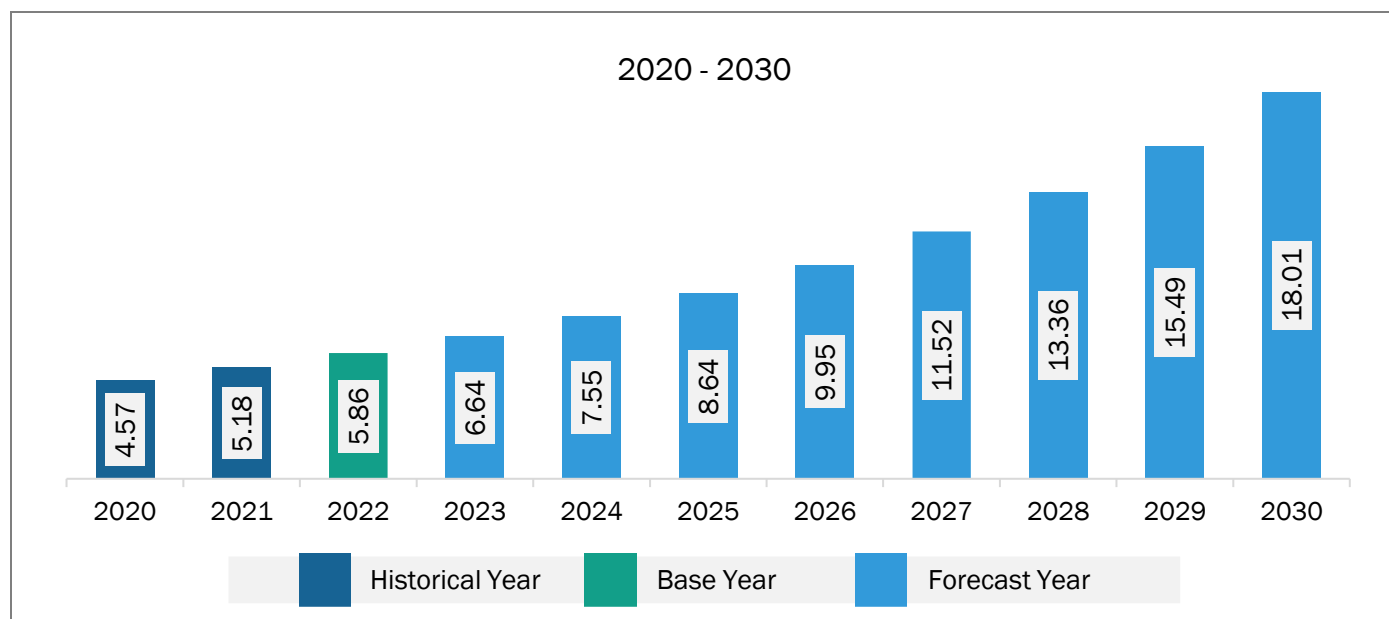
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	0.25	0.29	0.34	0.39	0.46	0.55	0.65	0.77	0.93	1.11	1.32	18.7%
Retail	0.28	0.32	0.36	0.42	0.49	0.56	0.66	0.78	0.91	1.08	1.27	16.9%
IT and Telecom	0.50	0.56	0.62	0.68	0.76	0.85	0.95	1.07	1.20	1.35	1.52	12.0%
BFSI	0.71	0.83	0.98	1.15	1.36	1.61	1.92	2.30	2.75	3.30	3.97	19.1%
Healthcare	0.27	0.30	0.33	0.37	0.42	0.47	0.53	0.61	0.69	0.79	0.90	13.3%
Education	0.12	0.14	0.15	0.17	0.20	0.22	0.26	0.29	0.34	0.39	0.45	14.6%
Media and Entertainment	0.08	0.09	0.11	0.12	0.13	0.15	0.17	0.20	0.23	0.26	0.30	14.1%
Others	0.08	0.09	0.10	0.11	0.12	0.14	0.16	0.18	0.21	0.24	0.28	14.4%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 0.98 million in 2022 and is projected to reach US\$ 3.97 million by 2030; it is expected to grow at a CAGR of 19.1% from 2022 to 2030.

10.4.6.2 Saudi Arabia Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 62. Saudi Arabia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in Saudi Arabia was valued at US\$ 5.86 million in 2022 and is projected to reach US\$ 18.01 million by 2030; it is expected to grow at a CAGR of 15.1% during the forecast period.

In Saudi Arabia, the Personal Data Protection Law (PDPL) became effective on March 17, 2023. The PDPL is the country's first data protection law regulating the processing of personal data of Saudi Arabia residents. As a result, enterprises and organizations that sell products or provide services in Saudi Arabia are required to follow the PDPL. It is a new law that governs how enterprises collect, use, store, transmit, share, and update data about residents of Saudi Arabia. According to the PDPL, organizations must clearly state why personal data is being collected and used. Personal information should also be relevant, and controllers should collect only the minimum data required to achieve the intended aim of the companies. This raises the importance of consent management services such as cookie management and preferred consent solutions, which are expected to boost the consent management market in Saudi Arabia during the forecast period.

Also, the Saudi Arabian government is strategically focusing on digital transformation. The government has made several efforts regarding digitization to meet the country's plan for building an innovative and robust economy, per VISION 2030. For instance, Cisco Inc. signed an MOU with the Saudi Ministry of Commerce and Investment. The company plans to assist the country's growth regarding digitization through various programs. Furthermore, Cisco's Country Digitization Acceleration Program aligns with the National Transformation Program and Saudi Arabia's Vision 2030, focusing on education, healthcare, cybersecurity, and smart cities. These developments require managing, storing, and protecting huge amounts of data while adhering to PDPL regulations. Thus, such new regulations are expected to offer lucrative opportunities for the growth of the consent management market in the country during the forecast period.

10.4.6.2.1 Saudi Arabia Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in Saudi Arabia is shown in the table provided below:

Table 90. Saudi Arabia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	3.58	4.07	4.62	5.25	5.99	6.88	7.95	9.23	10.74	12.49	14.57	15.5%
Services	0.99	1.11	1.24	1.39	1.56	1.76	2.00	2.29	2.62	3.00	3.44	13.6%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 4.62 million in 2022 and is projected to reach US\$ 14.57 million by 2030; it is expected to grow at a CAGR of 15.5% from 2022 to 2030.

Table 91. Saudi Arabia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	2.32	2.65	3.02	3.45	3.95	4.56	5.29	6.17	7.20	8.42	9.86	15.9%
Cookie Management	1.26	1.42	1.60	1.80	2.04	2.32	2.66	3.07	3.54	4.08	4.72	14.5%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 3.02 million in 2022 and is projected to reach US\$ 9.86 million by 2030; it is expected to grow at a CAGR of 15.9% from 2022 to 2030.

10.4.6.2.2 Saudi Arabia Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in Saudi Arabia is shown in the table provided below:

Table 92. Saudi Arabia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	1.54	1.72	1.92	2.14	2.40	2.70	3.07	3.49	3.98	4.54	5.20	13.3%
Cloud-based	3.03	3.46	3.94	4.50	5.15	5.94	6.89	8.03	9.38	10.95	12.82	15.9%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 3.94 million in 2022 and is projected to reach US\$ 12.82 million by 2030; it is expected to grow at a CAGR of 15.9% from 2022 to 2030.

10.4.6.2.3 Saudi Arabia Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in Saudi Arabia is shown in the table provided below:

Table 93. Saudi Arabia Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

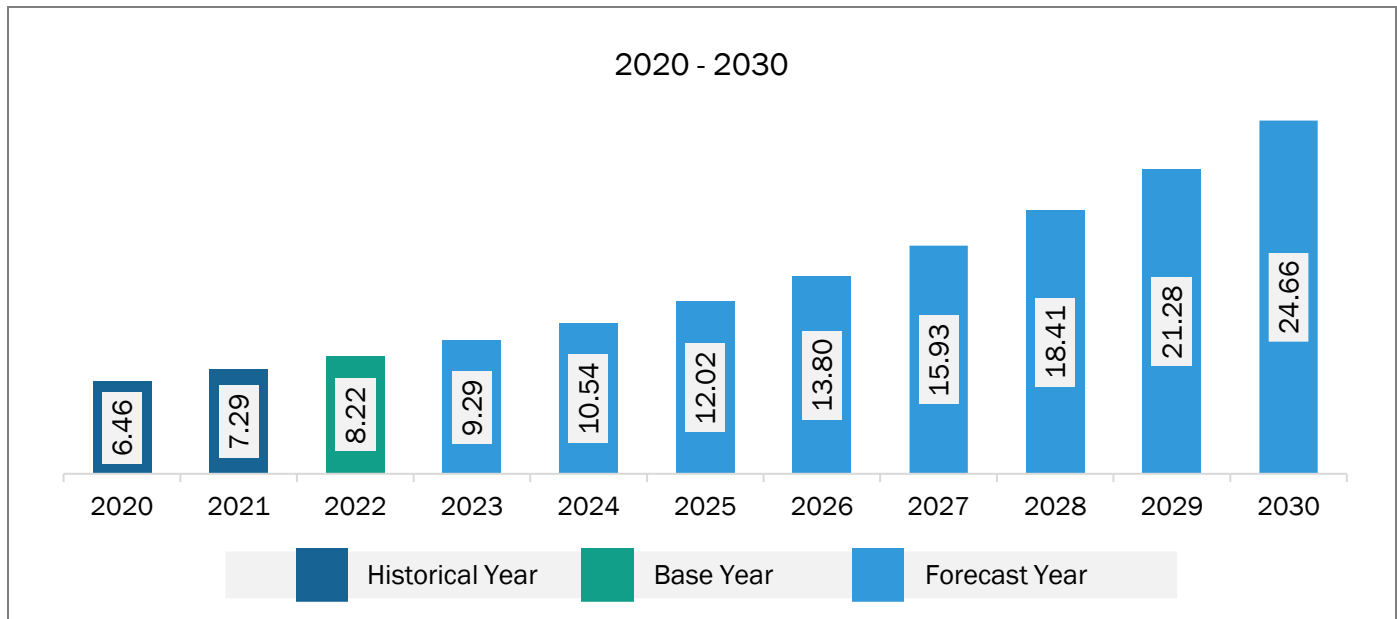
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	0.47	0.54	0.63	0.73	0.85	1.00	1.17	1.39	1.64	1.94	2.30	17.6%
Retail	0.57	0.65	0.74	0.84	0.96	1.10	1.27	1.48	1.73	2.01	2.35	15.6%
IT and Telecom	1.02	1.13	1.24	1.37	1.51	1.68	1.88	2.11	2.36	2.65	2.98	11.6%
BFSI	1.35	1.57	1.83	2.13	2.49	2.93	3.46	4.11	4.88	5.80	6.90	18.1%
Healthcare	0.54	0.60	0.66	0.73	0.81	0.90	1.00	1.13	1.27	1.43	1.60	11.7%
Education	0.26	0.29	0.32	0.36	0.40	0.45	0.52	0.59	0.67	0.76	0.87	13.3%
Media and Entertainment	0.19	0.20	0.23	0.25	0.28	0.31	0.35	0.40	0.45	0.51	0.57	12.3%
Others	0.18	0.20	0.21	0.23	0.25	0.28	0.30	0.33	0.36	0.40	0.43	9.2%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 1.83 million in 2022 and is projected to reach US\$ 6.90 million by 2030; it is expected to grow at a CAGR of 18.1% from 2022 to 2030.

10.4.6.3 UAE Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 63. UAE Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in UAE was valued at US\$ 8.22 million in 2022 and is projected to reach US\$ 24.66 million by 2030; it is expected to grow at a CAGR of 14.7% during the forecast period.

As a Free Zone, the Abu Dhabi Global Market (ADGM)—the international financial center established in the UAE capital—has had a data protection regulation since 2015. The Data Protection (Amendment) Regulations added several amendments to it. The UAE government implemented its Federal Personal Data Protection (PDP) Law on January 2, 2022, creating a legislative framework to safeguard the security and privacy of personal information. The PDP Law is intended to protect and empower the data privacy rights of UAE citizens and residents and change the way enterprises approach data security and privacy standards. Over the last decade, technical improvements and economic reforms in the UAE have increased the collection and processing of massive amounts of data, including personal data. However, under the UAE PDP Law requirements, individuals are raising the demand for better visibility and control over personal data. Businesses must immediately align their operations and regulatory structure with the new law, which can create a need for substantial planning by companies to assess the data that should be processed. Thus, these strict data protection policies provide opportunities for consent management providers to deliver their solutions and services to businesses in the UAE, thereby driving the consent management market in the country.

10.4.6.3.1 UAE Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in UAE is shown in the table provided below:

Table 94. UAE Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	4.95	5.60	6.33	7.17	8.15	9.32	10.73	12.41	14.37	16.65	19.34	15.0%
Services	1.51	1.69	1.89	2.12	2.39	2.70	3.08	3.52	4.04	4.63	5.33	13.8%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 6.33 million in 2022 and is projected to reach US\$ 19.34 million by 2030; it is expected to grow at a CAGR of 15.0% from 2022 to 2030.

Table 95. UAE Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	3.21	3.65	4.14	4.71	5.38	6.18	7.14	8.29	9.64	11.21	13.08	15.5%
Cookie Management	1.74	1.95	2.19	2.46	2.77	3.15	3.59	4.12	4.73	5.43	6.26	14.0%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 4.14 million in 2022 and is projected to reach US\$ 13.08 million by 2030; it is expected to grow at a CAGR of 15.5% from 2022 to 2030.

10.4.6.3.2 UAE Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in UAE is shown in the table provided below:

Table 96. UAE Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	2.23	2.48	2.76	3.07	3.43	3.86	4.36	4.96	5.64	6.41	7.31	13.0%
Cloud-based	4.23	4.81	5.46	6.22	7.10	8.16	9.44	10.97	12.77	14.87	17.35	15.5%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 5.46 million in 2022 and is projected to reach US\$ 17.35 million by 2030; it is expected to grow at a CAGR of 15.5% from 2022 to 2030.

10.4.6.3.3 UAE Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on End-use Industry in UAE is shown in the table provided below:

Table 97. UAE Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

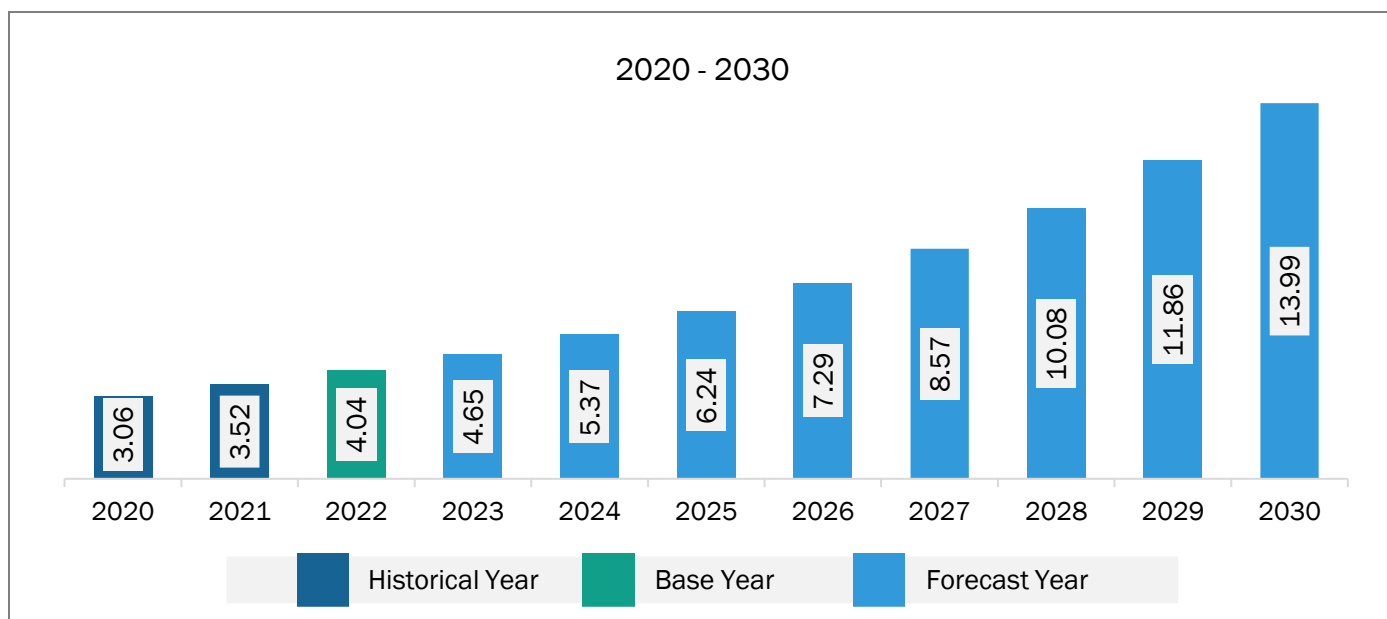
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	0.68	0.78	0.89	1.03	1.19	1.39	1.62	1.90	2.24	2.63	3.10	16.8%
Retail	0.82	0.93	1.05	1.19	1.36	1.56	1.80	2.08	2.42	2.81	3.27	15.3%
IT and Telecom	1.42	1.56	1.72	1.89	2.08	2.30	2.56	2.87	3.21	3.58	4.01	11.2%
BFSI	1.88	2.19	2.54	2.95	3.44	4.04	4.76	5.63	6.67	7.90	9.37	17.7%
Healthcare	0.77	0.85	0.94	1.03	1.14	1.26	1.41	1.58	1.77	1.98	2.22	11.4%
Education	0.38	0.42	0.47	0.52	0.58	0.65	0.74	0.84	0.95	1.08	1.24	13.0%
Media and Entertainment	0.27	0.30	0.33	0.37	0.41	0.46	0.51	0.58	0.65	0.74	0.83	12.1%
Others	0.24	0.26	0.28	0.31	0.34	0.37	0.41	0.45	0.50	0.55	0.61	10.2%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 2.54 million in 2022 and is projected to reach US\$ 9.37 million by 2030; it is expected to grow at a CAGR of 17.7% from 2022 to 2030.

10.4.6.4 Rest of Middle East & Africa Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 64. Rest of Middle East & Africa Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in UK was valued at US\$ 4.04 million in 2022 and is projected to reach US\$ 13.99 million by 2030; it is expected to grow at a CAGR of 16.8% during the forecast period.

Businesses in North Africa and the Middle East are gradually experiencing the operational and regulatory challenges that corporations in the US and Europe have faced in recent years. Various data privacy legislation has been enacted in the past years in the region. For instance, to protect the privacy of people's personal data, Qatar implemented Law No. (13) of 2016 ("the Personal Data Privacy Protection Law"). With this, Qatar became the first member of the Gulf Cooperation Council (GCC) to pass a personal data privacy law. The Ministry of Transport and Communications has been given the responsibility of enforcing the law. Also, The Sultanate of Oman published the Personal Data Protection Law in February 2022, which established stronger criteria for data privacy and protection and raised awareness of the importance of data protection compliance. In general, Middle Eastern privacy laws prohibit the acquisition and use of personal data and give individuals the right to access, alter, and erase their personal information. Companies have found it difficult to meet all standards due to the intricacies involved. Since, the GDPR is challenging to understand and apply. To guarantee that they are satisfying the standards, organizations may need to retain professional consultants or seek legal guidance. Hence, businesses are opting for consent management tools and solutions to avoid fines or legal actions. Thus, the rising adoption of consent management solutions is driving the market in the Rest of MEA.

10.4.6.4.1 Rest of Middle East & Africa Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in the UK is shown in the table provided below:

Table 98. Rest of Middle East & Africa Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	2.57	2.97	3.42	3.94	4.57	5.32	6.24	7.35	8.67	10.23	12.10	17.1%
Services	0.49	0.55	0.62	0.71	0.80	0.92	1.05	1.22	1.41	1.63	1.89	14.9%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 3.42 million in 2022 and is projected to reach US\$ 12.10 million by 2030; it is expected to grow at a CAGR of 17.1% from 2022 to 2030.

Table 99. Rest of Middle East & Africa Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	1.65	1.91	2.21	2.57	2.99	3.49	4.11	4.87	5.76	6.83	8.11	17.6%
Cookie Management	0.92	1.05	1.20	1.38	1.58	1.83	2.13	2.49	2.91	3.40	3.99	16.2%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 2.21 million in 2022 and is projected to reach US\$ 8.11 million by 2030; it is expected to grow at a CAGR of 17.6% from 2022 to 2030.

10.4.6.4.2 Rest of Middle East & Africa Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in the UK is shown in the table provided below:

Table 100. Rest of Middle East & Africa Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	0.98	1.11	1.26	1.43	1.62	1.85	2.13	2.46	2.84	3.29	3.81	14.8%
Cloud-based	2.08	2.41	2.78	3.23	3.75	4.39	5.17	6.11	7.24	8.58	10.18	17.6%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 2.78 million in 2022 and is projected to reach US\$ 10.18 million by 2030; it is expected to grow at a CAGR of 17.6% from 2022 to 2030.

10.4.6.4.3 Rest of Middle East & Africa Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in the UK is shown in the table provided below:

Table 101. Rest of Middle East & Africa Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	0.31	0.37	0.44	0.53	0.63	0.76	0.92	1.11	1.35	1.64	1.99	20.7%
Retail	0.37	0.43	0.49	0.57	0.66	0.77	0.91	1.07	1.27	1.50	1.77	17.4%
IT and Telecom	0.70	0.78	0.86	0.95	1.06	1.18	1.33	1.50	1.68	1.89	2.12	12.0%
BFSI	0.92	1.09	1.29	1.53	1.81	2.16	2.59	3.12	3.76	4.53	5.47	19.8%
Healthcare	0.37	0.41	0.46	0.52	0.58	0.66	0.74	0.85	0.97	1.11	1.26	13.5%
Education	0.16	0.19	0.21	0.24	0.27	0.31	0.35	0.41	0.47	0.55	0.63	14.8%
Media and Entertainment	0.11	0.13	0.15	0.16	0.19	0.21	0.24	0.28	0.32	0.37	0.42	14.3%
Others	0.11	0.13	0.14	0.15	0.17	0.19	0.21	0.23	0.26	0.29	0.32	11.1%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 1.29 million in 2022 and is projected to reach US\$ 5.47 million by 2030; it is expected to grow at a CAGR of 19.8% from 2022 to 2030. The market for the government segment is estimated to be worth US\$ 1.99 million by 2030 and is expected to grow at a CAGR of 20.7% during the 2022 - 2030 period.

10.5 South & Central America

10.5.1 South & Central America Consent Management Market Overview

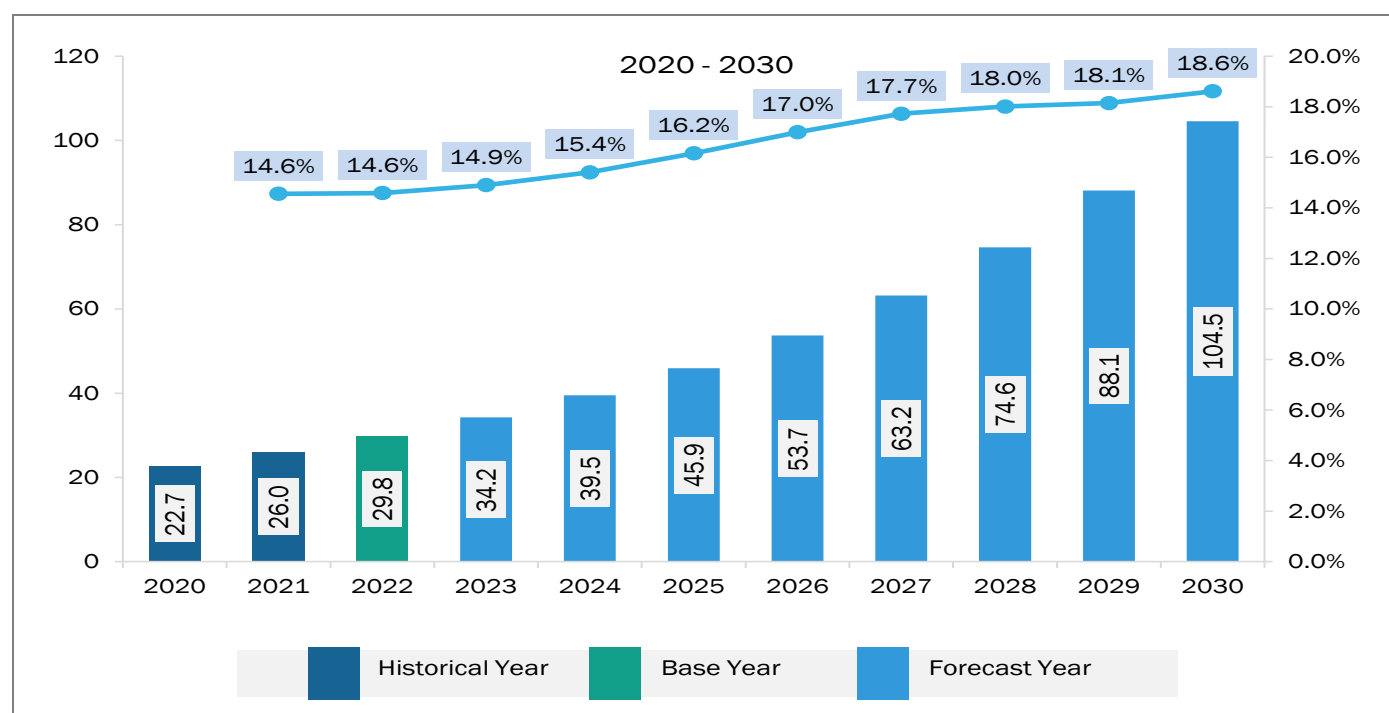
The consent management market in South America is segmented into Brazil, Argentina, and the Rest of South America. The region has witnessed a shift toward connected devices in the past few years due to the growing penetration of mobile networks and smartphones in countries such as Brazil, Chile, and Argentina. This is increasing the use of online platforms among the citizens. As a result, individuals are sharing personal information, thereby raising the concern about privacy protection. To cater to this, the government of Brazil has implemented the General Personal Data Protection Law (LGPD). The law is applied to any individual or legal entity, including the government, which is working on processing the personal data of the population of Brazil. The law is implemented to protect the fundamental rights of freedom and privacy and the free development of the personality of the people. Thus, the implementation of such data protection and privacy regulations is expected to propel the growth of the consent management market in South America during the forecast period.

Furthermore, with the growing adoption of data protection and privacy regulations, various global market players are expanding their business in South America to help different companies to implement the regulations. For instance, in September 2020, OneTrust announced the expansion of its operations, support, and services in Brazil to support Brazilian customers and companies to comply with the LGPD. Hence, all the above factors are expected to fuel the growth of the consent management market in the region during the forecast period.

10.5.2 South & Central America Consent Management Market Revenue and Forecasts to 2030 (US\$ Million)

Consent management market accounted for US\$ 29.80 million in the year 2022 and it is expected to grow at a CAGR of 17.0% during the forecast period, to reach US\$ 104.55 million in the year 2030.

Figure 65. Consent Management Market Revenue and Forecasts To 2030 (US\$ Million)

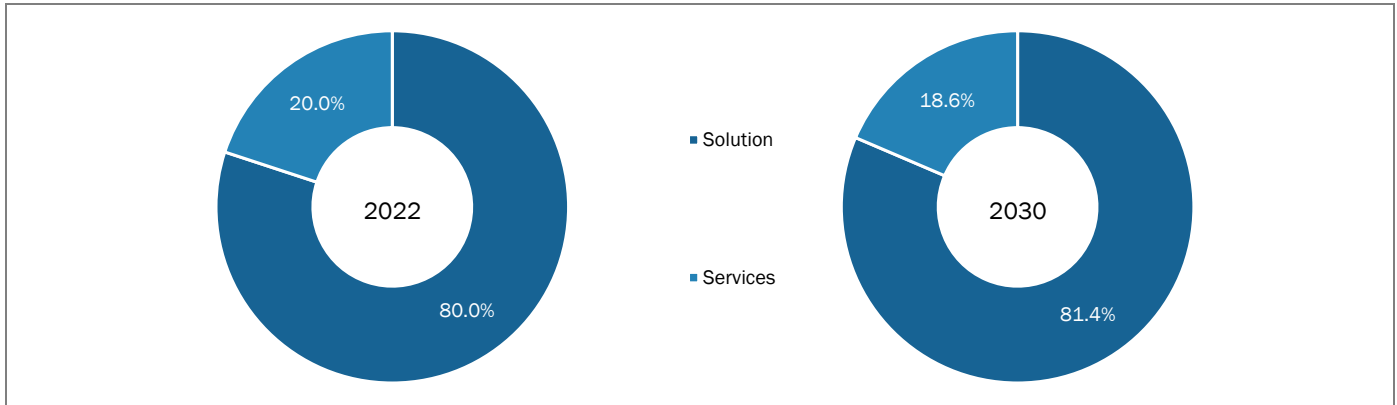


Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

10.5.3 South & Central America Consent Management Market Breakdown by Component

The consent management market was dominated by the Solution segment, which accounted to 80.0% in 2022 and is estimated to account for 81.4% market revenue share by 2030.

Figure 66. South & Central America Consent Management Market Breakdown by Component (2022 and 2030)



10.5.3.1 South & Central America Consent Management Market and Forecasts and Analysis - By Component

Table 102. South & Central America Consent Management Market Revenue and Forecasts To 2030 (US\$ Million) - By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022-2030)
Solution	18.09	20.77	23.85	27.47	31.77	36.98	43.36	51.15	60.50	71.63	85.14	17.2%
Services	4.61	5.23	5.95	6.77	7.75	8.92	10.34	12.06	14.11	16.51	19.41	15.9%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 23.85 million in 2022 and is projected to reach US\$ 85.14 million by 2030; it is expected to grow at a CAGR of 17.2% from 2022 to 2030.

Table 103. South & Central America Consent Management Market Revenue and Forecasts To 2030 (US\$ Million) - By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022-2030)
Preference Management	12.03	13.87	16.00	18.49	21.48	25.11	29.55	35.01	41.57	49.41	58.97	17.7%
Cookie Management	6.06	6.90	7.86	8.97	10.29	11.88	13.81	16.15	18.93	22.21	26.17	16.2%

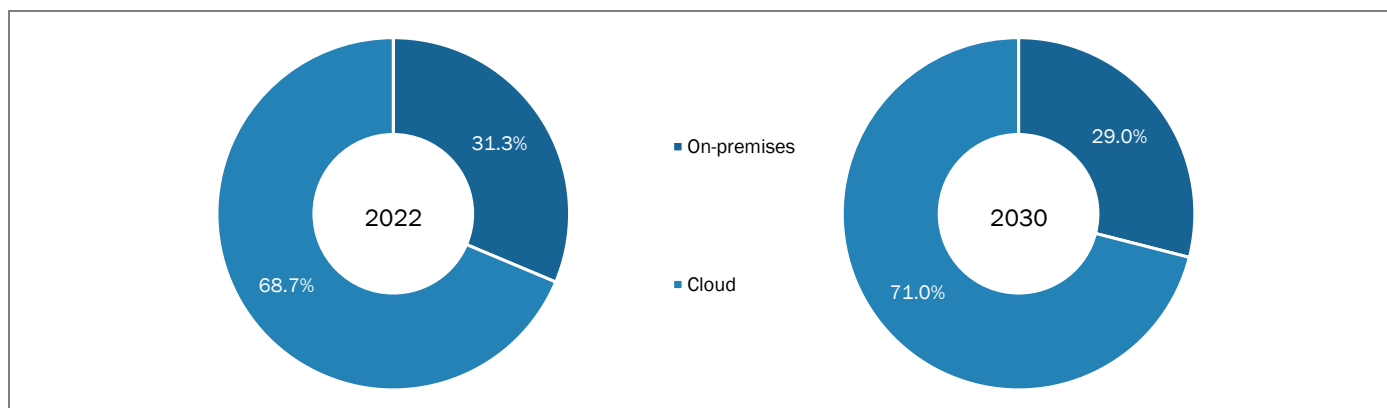
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 16.00 million in 2022 and is projected to reach US\$ 58.97 million by 2030; it is expected to grow at a CAGR of 17.7% from 2022 to 2030.

10.5.4 South & Central America Consent Management Market Breakdown by Deployment

The consent management market was dominated by the cloud-based segment, which accounted to 68.7% in 2022 and is estimated to account for 71.0% market revenue share by 2030.

Figure 67. South & Central America Consent Management Market Breakdown by Deployment (2022 and 2030)



10.5.4.1 South & Central America Consent Management Market Revenue and Forecasts and Analysis - By Deployment

Table 104. South & Central America Consent Management Market Revenue and Forecasts To 2030 (US\$ Million) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	7.25	8.23	9.34	10.63	12.15	13.98	16.20	18.88	22.06	25.81	30.30	15.9%
Cloud-based	15.45	17.78	20.46	23.61	27.37	31.92	37.50	44.34	52.54	62.33	74.24	17.5%

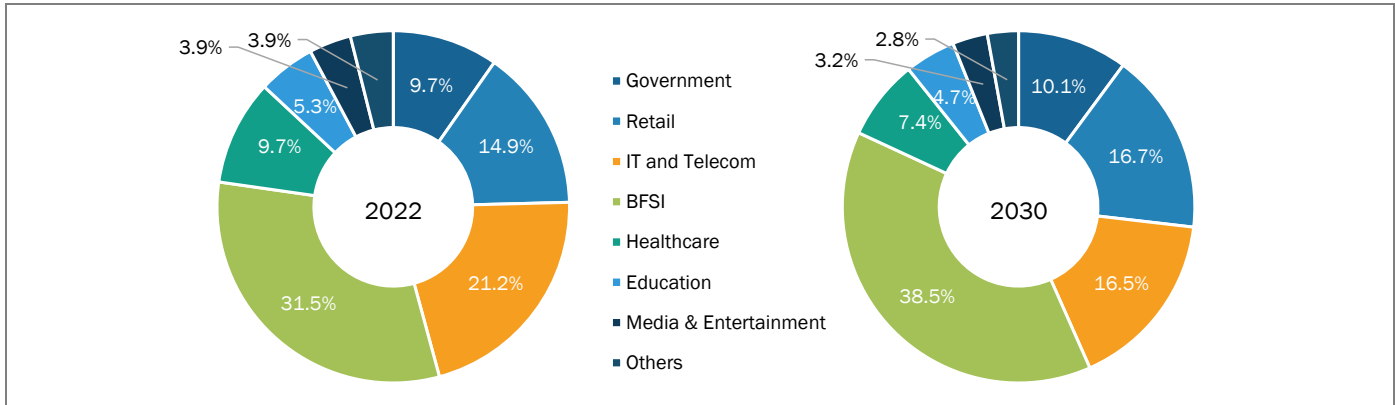
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 20.46 million in 2022 and is projected to reach US\$ 74.24 million by 2030; it is expected to grow at a CAGR of 17.5% from 2022 to 2030.

10.5.5 South & Central America Consent Management Market Breakdown by End-use Industry

The consent management market was dominated by the cloud-based segment, which accounted to 31.5% in 2022 and is estimated to account for 38.5% market revenue share by 2030.

Figure 68. South & Central America Consent Management Market Breakdown by End-use Industry (2022 and 2030)



10.5.5.1 South & Central America Consent Management Market Revenue and Forecasts and Analysis - By End-use Industry

Table 105. South & Central America Consent Management Market Revenue and Forecasts To 2030 (US\$ Million) – By End-use Industry

End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	2.18	2.51	2.89	3.34	3.88	4.53	5.32	6.30	7.47	8.87	10.58	17.6%
Retail	3.27	3.81	4.43	5.17	6.06	7.15	8.49	10.14	12.14	14.54	17.49	18.7%
IT and Telecom	5.07	5.66	6.31	7.06	7.91	8.92	10.13	11.55	13.20	15.08	17.28	13.4%
BFSI	6.75	7.96	9.38	11.08	13.14	15.66	18.80	22.69	27.43	33.19	40.29	20.0%
Healthcare	2.33	2.59	2.89	3.22	3.60	4.04	4.58	5.20	5.92	6.74	7.69	13.0%
Education	1.23	1.39	1.57	1.78	2.02	2.31	2.67	3.09	3.59	4.17	4.87	15.2%
Media and Entertainment	0.91	1.03	1.15	1.30	1.46	1.66	1.90	2.19	2.52	2.91	3.37	14.4%
Others	0.95	1.05	1.17	1.30	1.44	1.61	1.82	2.05	2.32	2.63	2.98	12.4%

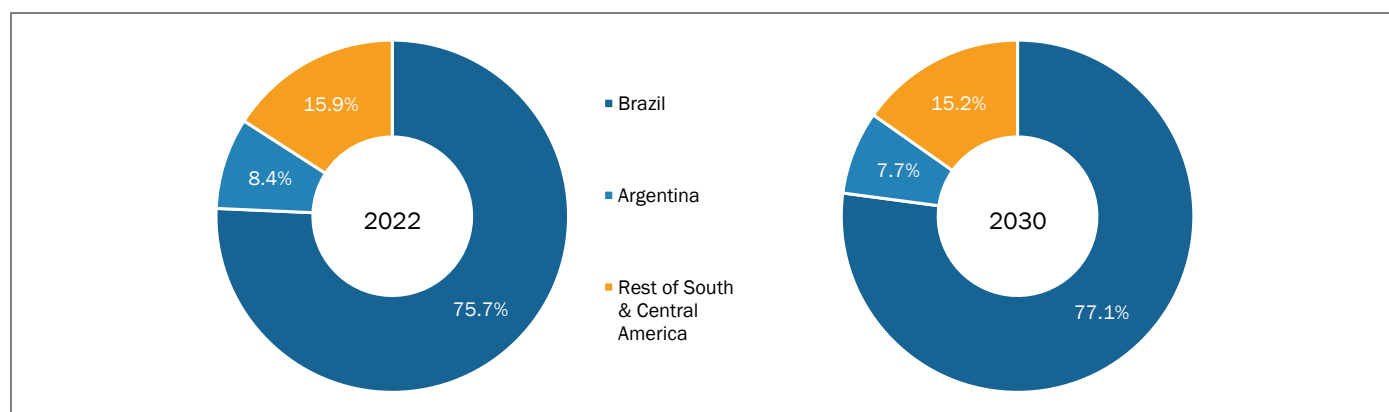
Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 9.38 million in 2022 and is projected to reach US\$ 40.29 million by 2030; it is expected to grow at a CAGR of 20.0% from 2022 to 2030.

10.5.6 South & Central America Consent Management Market Revenue and Forecasts and Analysis - By Countries

The consent management market was dominated by Brazil, which accounted to 75.7% in 2022 and is estimated to account for 77.1% market revenue share by 2030.

Figure 69. Consent Management Market Breakdown by Key Countries, 2022 and 2030 (%)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

Table 106. South and Central America Consent Management Market, by Country – Revenue and Forecast to 2030 (USD Million)

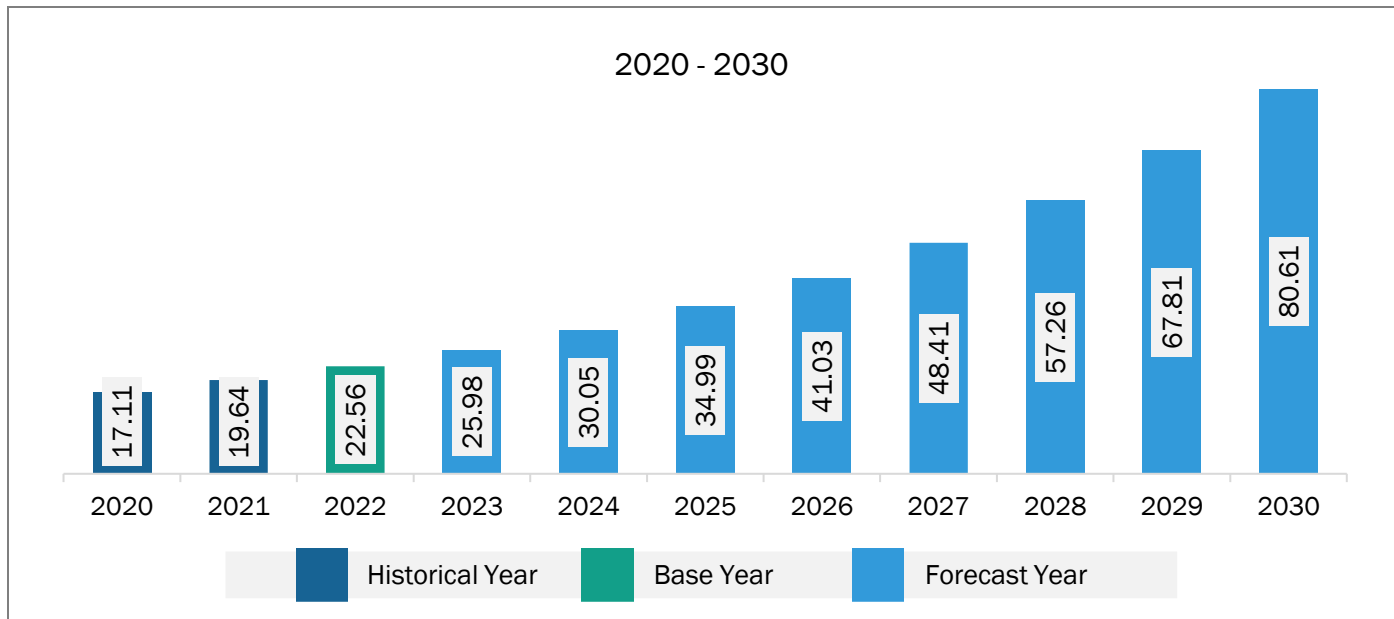
Country	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Brazil	17.11	19.64	22.56	25.98	30.05	34.99	41.03	48.41	57.26	67.81	80.61	17.3%
Argentina	1.95	2.21	2.50	2.84	3.24	3.73	4.31	5.01	5.85	6.83	8.00	15.6%
Rest of South and Central America	3.65	4.16	4.74	5.42	6.22	7.18	8.36	9.79	11.49	13.51	15.93	16.4%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market in Brazil was worth US\$ 22.56 million in 2022 and is projected to reach US\$ 80.61 million by 2030; it is expected to grow at a CAGR of 17.3% from 2022 to 2030.

10.5.6.1 Brazil Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 70. Brazil Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in Brazil was valued at US\$ 22.56 million in 2022 and is projected to reach US\$ 80.61 million by 2030; it is expected to grow at a CAGR of 17.3% during the forecast period.

Brazil is considered the largest economic country in South America, leading to increased technological developments in the country. As the government approved the general framework of internet regulation, comprising certain aspects of privacy, in 2015, the security landscape has been improving gradually. The government launched various initiatives related to data privacy. For instance, Brazil's Lei Geral de Proteção de Dados Pessoais (General Data Protection Law) (LGPD) went into effect on August 16, 2020, and will be enforced by the National Data Protection Authority (Autoridade Nacional de Proteção de Dados). The LGPD is a framework encompassing 65 rules that regulate the use and processing of personal data. Noncompliance with the LGPD can result in fines of up to 50 million Brazilian reais (approximately EUR 8 million) per infraction, or 2% of a company's annual revenue in the country. Due to such strict rules, businesses are extensively adopting consent management solutions to manage their data-related compliance issues.

Also, the adoption of Industry 4.0 technologies in Brazil has increased in order to establish a robust IT sector, and various companies operating in the sector are actively collecting customer data to predict consumer behavior and trends to enhance productivity and efficiency. Global players are providing consent management solutions to manage huge data and a means to adhere to regulatory compliance. For instance, in 2021, OneTrust announced to expand its operations to assist Brazilian clients and businesses in complying with the Lei Geral de Proteção de Dados Pessoais (LGPD). OneTrust's extensive partner network, and local Brazilian data center hosting alternatives are available in Brazilian, Portuguese, and other languages which is making easy for the businesses to adopt and use global consent management solutions. Hence, the adoption of consent management solutions is rapidly increasing among companies in Brazil, which is driving the market for consent management in the country.

10.5.6.1.1 Brazil Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in Brazil is shown in the table provided below:

Table 107. Brazil Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	13.48	15.50	17.84	20.59	23.86	27.83	32.70	38.65	45.81	54.35	64.73	17.5%
Services	3.63	4.14	4.72	5.40	6.20	7.16	8.33	9.76	11.46	13.46	15.88	16.4%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 17.84 million in 2022 and is projected to reach US\$ 64.73 million by 2030; it is expected to grow at a CAGR of 17.5% from 2022 to 2030.

Table 108. Brazil Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	8.91	10.29	11.89	13.78	16.04	18.79	22.16	26.31	31.30	37.29	44.60	18.0%
Cookie Management	4.57	5.21	5.95	6.80	7.82	9.04	10.53	12.35	14.50	17.06	20.13	16.5%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 11.89 million in 2022 and is projected to reach US\$ 44.60 million by 2030; it is expected to grow at a CAGR of 18.0% from 2022 to 2030.

10.5.6.1.2 Brazil Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in Brazil is shown in the table provided below:

Table 109. Brazil Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	5.34	6.07	6.91	7.89	9.04	10.43	12.12	14.17	16.60	19.47	22.92	16.2%
Cloud-based	11.77	13.57	15.65	18.09	21.01	24.56	28.91	34.25	40.67	48.34	57.69	17.7%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 15.65 million in 2022 and is projected to reach US\$ 57.69 million by 2030; it is expected to grow at a CAGR of 17.7% from 2022 to 2030.

10.5.6.1.3 Brazil Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in Brazil is shown in the table provided below:

Table 110. Brazil Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

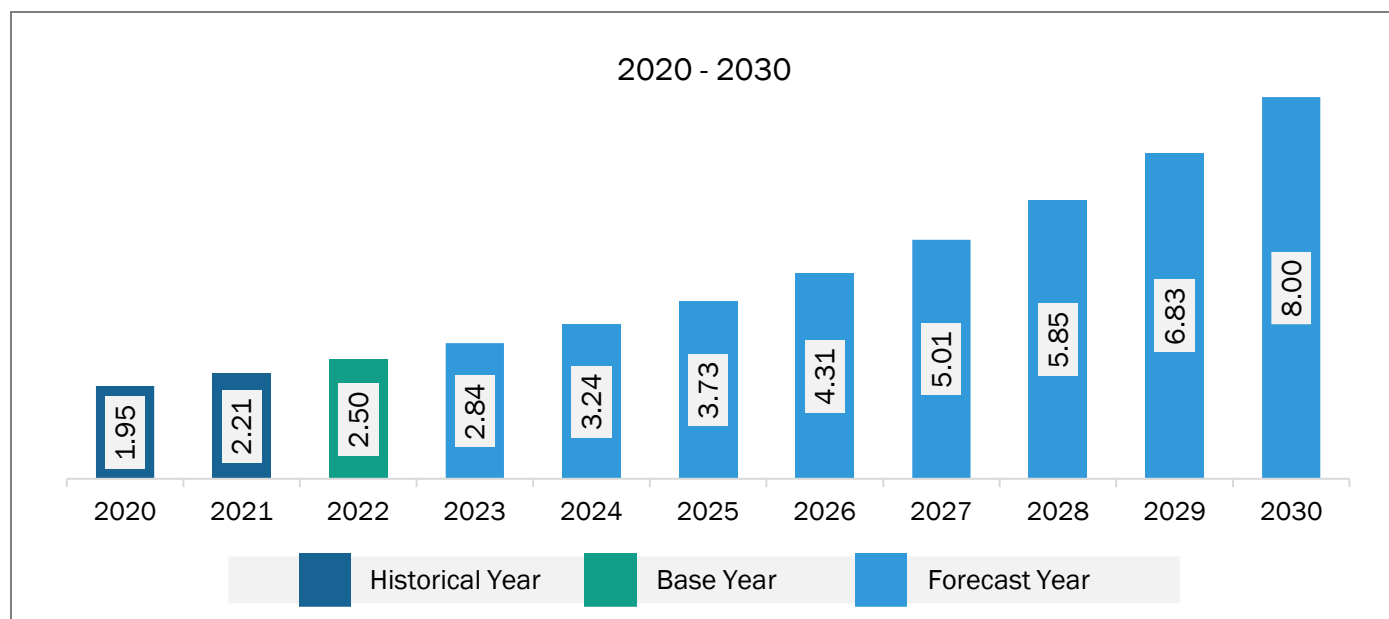
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	1.68	1.93	2.23	2.58	2.99	3.50	4.12	4.88	5.79	6.89	8.22	17.7%
Retail	2.40	2.80	3.27	3.83	4.49	5.31	6.32	7.56	9.08	10.90	13.14	19.0%
IT and Telecom	3.80	4.25	4.76	5.33	5.99	6.77	7.70	8.81	10.09	11.55	13.27	13.7%
BFSI	5.06	5.99	7.08	8.38	9.96	11.90	14.32	17.33	21.00	25.47	30.99	20.3%
Healthcare	1.77	1.98	2.21	2.46	2.76	3.11	3.53	4.02	4.58	5.23	5.98	13.3%
Education	0.94	1.07	1.20	1.37	1.56	1.78	2.06	2.39	2.78	3.23	3.78	15.3%
Media and Entertainment	0.71	0.80	0.90	1.01	1.14	1.30	1.49	1.71	1.98	2.28	2.64	14.5%
Others	0.74	0.82	0.92	1.03	1.16	1.32	1.50	1.72	1.97	2.26	2.59	13.8%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 7.08 million in 2022 and is projected to reach US\$ 30.99 million by 2030; it is expected to grow at a CAGR of 20.3% from 2022 to 2030.

10.5.6.2 Argentina Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 71. Argentina Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in Argentina was valued at US\$ 2.50 million in 2022 and is projected to reach US\$ 8.00 million by 2030; it is expected to grow at a CAGR of 15.6% during the forecast period.

Argentina's Personal Data Protection Act, Act No. 25.326 (the Act), is the primary data protection legislation. However, in September 2022, the Argentine government-initiated recommendations for a new draft bill (the New Bill) on personal data protection, which introduced various changes, including biometric data, genetic data, pseudonymization, and profiling. These new implementations force businesses to adopt advanced data protection solutions, such as consent management solutions.

Also, with the rise in urbanization in Argentina, the majority of the population is shifting toward urban localities. This is creating significant demand for infrastructure in cities. Due to the rise in disposable incomes, there is an increased need for consumer behavior pattern assessment. As a result, the demand for consent management solutions in Argentina is rising to provide data protection and adherence to regulatory compliance. Thus, owing to the above-mentioned factors, the consent management market in Argentina is expected to grow during the forecast period.

10.5.6.2.1 Argentina Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in Argentina is shown in the table provided below:

Table 111. Argentina Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	1.59	1.80	2.05	2.34	2.68	3.09	3.58	4.18	4.89	5.73	6.74	16.0%
Services	0.36	0.40	0.45	0.50	0.57	0.64	0.73	0.83	0.96	1.10	1.26	13.8%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 2.05 million in 2022 and is projected to reach US\$ 6.74 million by 2030; it is expected to grow at a CAGR of 16.0% from 2022 to 2030.

Table 112. Argentina Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	1.06	1.21	1.38	1.58	1.82	2.11	2.45	2.88	3.38	3.97	4.69	16.5%
Cookie Management	0.53	0.59	0.67	0.76	0.86	0.98	1.13	1.30	1.51	1.76	2.05	15.0%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 1.38 million in 2022 and is projected to reach US\$ 4.69 million by 2030; it is expected to grow at a CAGR of 16.5% from 2022 to 2030.

10.5.6.2.2 Argentina Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in Argentina is shown in the table provided below:

Table 113. Argentina Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	0.64	0.71	0.79	0.89	1.00	1.13	1.28	1.47	1.68	1.93	2.22	13.8%
Cloud-based	1.31	1.50	1.71	1.96	2.25	2.60	3.03	3.55	4.17	4.90	5.78	16.5%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 1.71 million in 2022 and is projected to reach US\$ 5.78 million by 2030; it is expected to grow at a CAGR of 16.5% from 2022 to 2030.

10.5.6.2.3 Argentina Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in Argentina is shown in the table provided below:

Table 114. Argentina Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

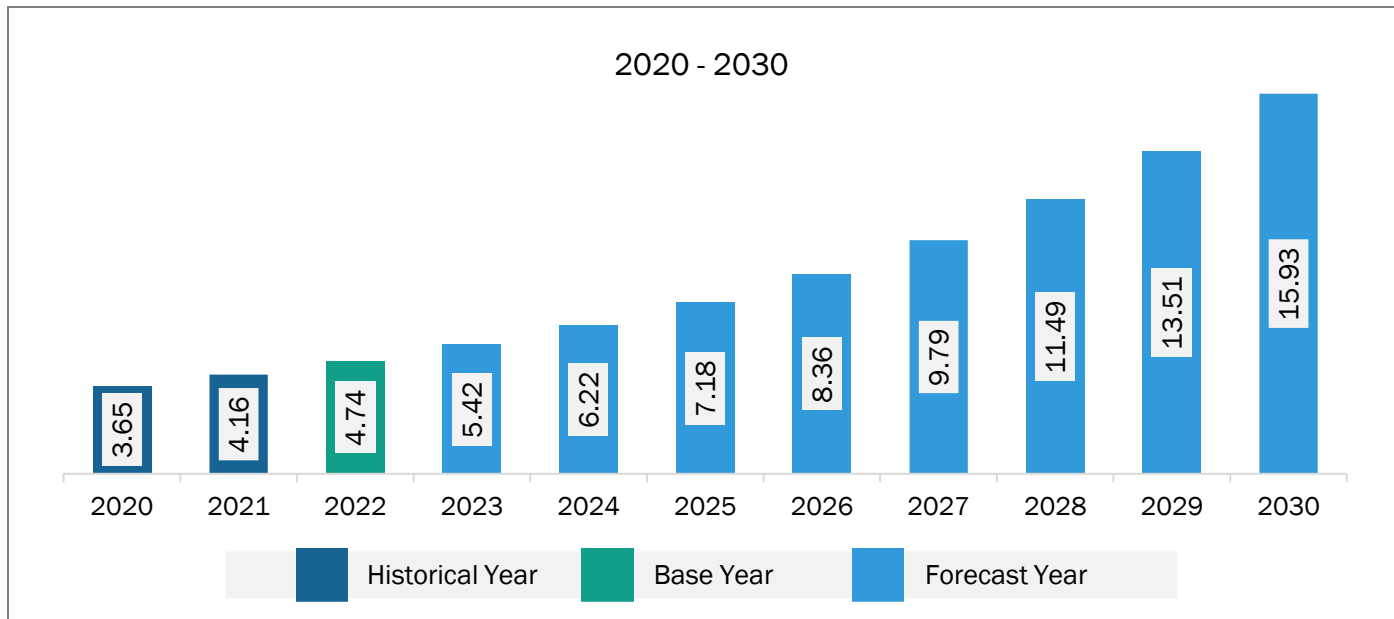
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	0.17	0.19	0.22	0.26	0.30	0.34	0.40	0.47	0.56	0.66	0.78	16.9%
Retail	0.30	0.34	0.40	0.46	0.53	0.62	0.73	0.86	1.02	1.22	1.45	17.6%
IT and Telecom	0.44	0.48	0.53	0.59	0.66	0.73	0.82	0.93	1.05	1.18	1.34	12.2%
BFSI	0.58	0.68	0.79	0.93	1.08	1.28	1.52	1.81	2.16	2.59	3.10	18.6%
Healthcare	0.20	0.22	0.24	0.27	0.29	0.33	0.37	0.41	0.46	0.52	0.58	11.7%
Education	0.10	0.12	0.13	0.14	0.16	0.18	0.21	0.24	0.27	0.31	0.36	13.7%
Media and Entertainment	0.08	0.09	0.09	0.10	0.12	0.13	0.15	0.17	0.19	0.22	0.25	12.7%
Others	0.08	0.09	0.09	0.10	0.10	0.11	0.12	0.12	0.13	0.14	0.14	5.9%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 0.79 million in 2022 and is projected to reach US\$ 3.10 million by 2030; it is expected to grow at a CAGR of 18.6% from 2022 to 2030.

10.5.6.3 Rest of South & Central America Consent Management Market Revenue and Forecasts to 2030 (US\$ Mn)

Figure 72. Rest of South & Central America Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn)



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, Secondary Sources

The consent management market in UK was valued at US\$ 4.74 million in 2022 and is projected to reach US\$ 15.93 million by 2030; it is expected to grow at a CAGR of 16.4% during the forecast period.

In the Rest of SAM, the rising technological advancements in the automobile industry and growing sales of vehicles are the key factors contributing to the increased adoption of consent management solutions among end-use industries such as oil & gas and food & beverages. The solutions can help in managing and securing the massive volume of data in Chile, Columbia, and Peru. Due to the challenging economic situations and the high price of consent management solutions, businesses are recording slow growth in the adoption of consent management solutions in the Rest of SAM compared to other regions. Overall, while the scope of consent management might vary in these countries, there is a steady interest in data protection and management solutions across multiple sectors in the region.

10.5.6.3.1 Rest of South & Central America Consent Management Market Breakdown by Component

For the years 2020 to 2030, the consent management market based on Component in the UK is shown in the table provided below:

Table 115. Rest of South & Central America Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Component

Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Solution	3.03	3.46	3.96	4.54	5.23	6.07	7.08	8.32	9.80	11.55	13.67	16.7%
Services	0.62	0.69	0.78	0.87	0.98	1.12	1.28	1.47	1.69	1.95	2.26	14.3%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the solution segment was worth US\$ 3.96 million in 2022 and is projected to reach US\$ 13.67 million by 2030; it is expected to grow at a CAGR of 16.7% from 2022 to 2030.

Table 116. Rest of South & Central America Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Solution

Solution	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Preference Management	2.06	2.37	2.72	3.13	3.62	4.21	4.94	5.82	6.89	8.15	9.68	17.2%
Cookie Management	0.97	1.10	1.24	1.41	1.61	1.85	2.14	2.50	2.91	3.40	3.99	15.7%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the preference management segment was worth US\$ 2.72 million in 2022 and is projected to reach US\$ 9.68 million by 2030; it is expected to grow at a CAGR of 17.2% from 2022 to 2030.

10.5.6.3.2 Rest of South & Central America Consent Management Market Breakdown by Deployment

For the years 2020 to 2030, the consent management market based on Deployment in the UK is shown in the table provided below:

Table 117. Rest of South & Central America Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By Deployment

Deployment Model	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
On-premises	1.27	1.44	1.63	1.85	2.11	2.42	2.79	3.25	3.78	4.41	5.16	15.5%
Cloud-based	2.37	2.71	3.11	3.56	4.11	4.77	5.57	6.54	7.71	9.10	10.77	16.8%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the cloud-based segment was worth US\$ 3.11 million in 2022 and is projected to reach US\$ 10.77 million by 2030; it is expected to grow at a CAGR of 16.8% from 2022 to 2030.

10.5.6.3.3 Rest of South & Central America Consent Management Market Breakdown by End-use Industry

For the years 2020 to 2030, the consent management market based on end-use industry in the UK is shown in the table provided below:

Table 118. Rest of South & Central America Consent Management Market Revenue and Forecasts To 2030 (US\$ Mn) – By End-use Industry

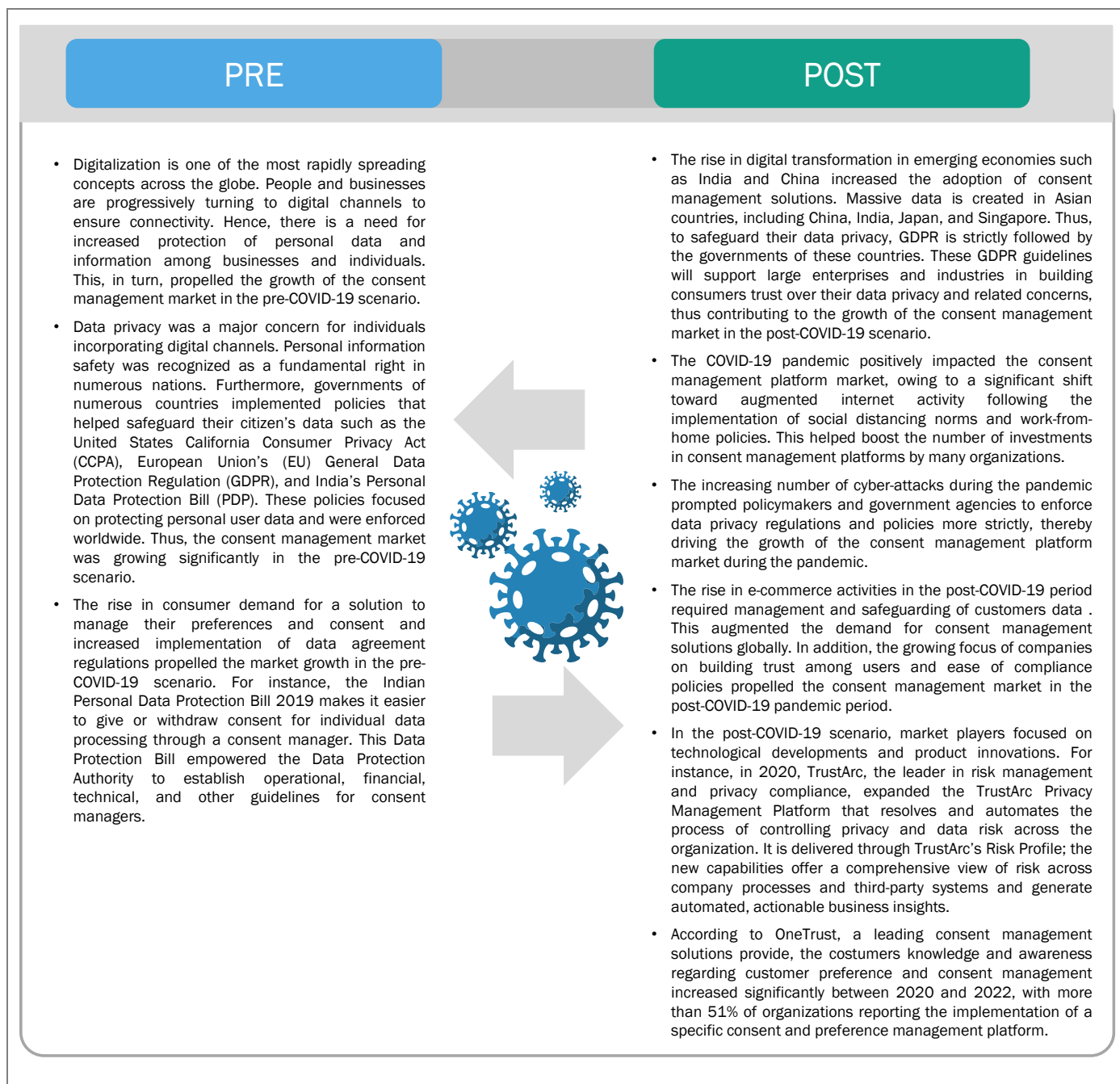
End-use Industry	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (2022–2030)
Government	0.34	0.39	0.44	0.51	0.59	0.69	0.80	0.95	1.12	1.33	1.58	17.2%
Retail	0.57	0.66	0.77	0.89	1.04	1.22	1.44	1.71	2.03	2.42	2.90	18.1%
IT and Telecom	0.83	0.92	1.02	1.14	1.27	1.42	1.61	1.82	2.07	2.35	2.68	12.8%
BFSI	1.10	1.29	1.51	1.78	2.09	2.48	2.96	3.55	4.27	5.14	6.20	19.3%
Healthcare	0.36	0.40	0.44	0.49	0.54	0.61	0.68	0.77	0.88	1.00	1.13	12.6%
Education	0.19	0.21	0.24	0.27	0.30	0.35	0.40	0.47	0.54	0.63	0.73	15.2%
Media and Entertainment	0.13	0.14	0.16	0.18	0.21	0.23	0.27	0.31	0.36	0.41	0.48	14.6%
Others	0.13	0.14	0.15	0.16	0.18	0.19	0.20	0.21	0.22	0.23	0.24	5.6%

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

The consent management market for the BFSI segment was worth US\$ 1.51 million in 2022 and is projected to reach US\$ 6.20 million by 2030; it is expected to grow at a CAGR of 19.3% from 2022 to 2030.

11. Consent Management Market – Impact of COVID-19 Pandemic

11.1 Pre & Post Covid-19 Impact



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

COVID-19 has positively impacted our consent management business for several reasons:

- During the pandemic, consumers significantly shifted their buying behavior towards digital channels, including online shopping, remote work, and virtual interactions, to accommodate social distancing and lockdowns.
- Additionally, the pandemic accelerated the adoption of digital solutions across most industries. This surge in digitalization has led to a higher volume of personal data being collected and processed, creating a greater need for businesses to manage consent effectively.
- The shift to remote work created new challenges for all businesses in managing consent across dispersed teams. Consent management platforms are now crucial to many organizations' hybrid working environments, as they ensure employees have the necessary permissions to access and handle sensitive data securely.
- The COVID-19 pandemic brought data privacy concerns and data breaches to the forefront, as individuals became more aware of the importance of their personal data and its potential misuse. Consequently, businesses faced increased scrutiny and pressure to comply with data protection regulations, prioritizing consent management.
- Some regions introduced new data privacy regulations or modified existing ones in response to the pandemic. For example, certain data protection authorities issued guidelines on handling personal data during COVID-19 contact tracing efforts. This dynamic regulatory environment has necessitated more robust consent management practices.
- Amid the uncertainty of the pandemic, consumers had become more sensitive to how their data is handled. Businesses that demonstrated transparent and responsible data practices through effective consent management garnered increased customer trust.
- As businesses embraced new technologies to enhance their operations, they needed reliable consent management platforms to ensure compliance and build customer trust.
- The COVID-19 pandemic has created a more complex and data-centric business environment, driving the demand for consent management solutions. Businesses recognize the importance of respecting individuals' rights and preferences regarding their personal data, leading to an increased interest in consent and preference management for businesses to facilitate compliance, transparency, and trust-building.

12. Competitive Landscape

12.1 Heat Map Analysis By Key Players

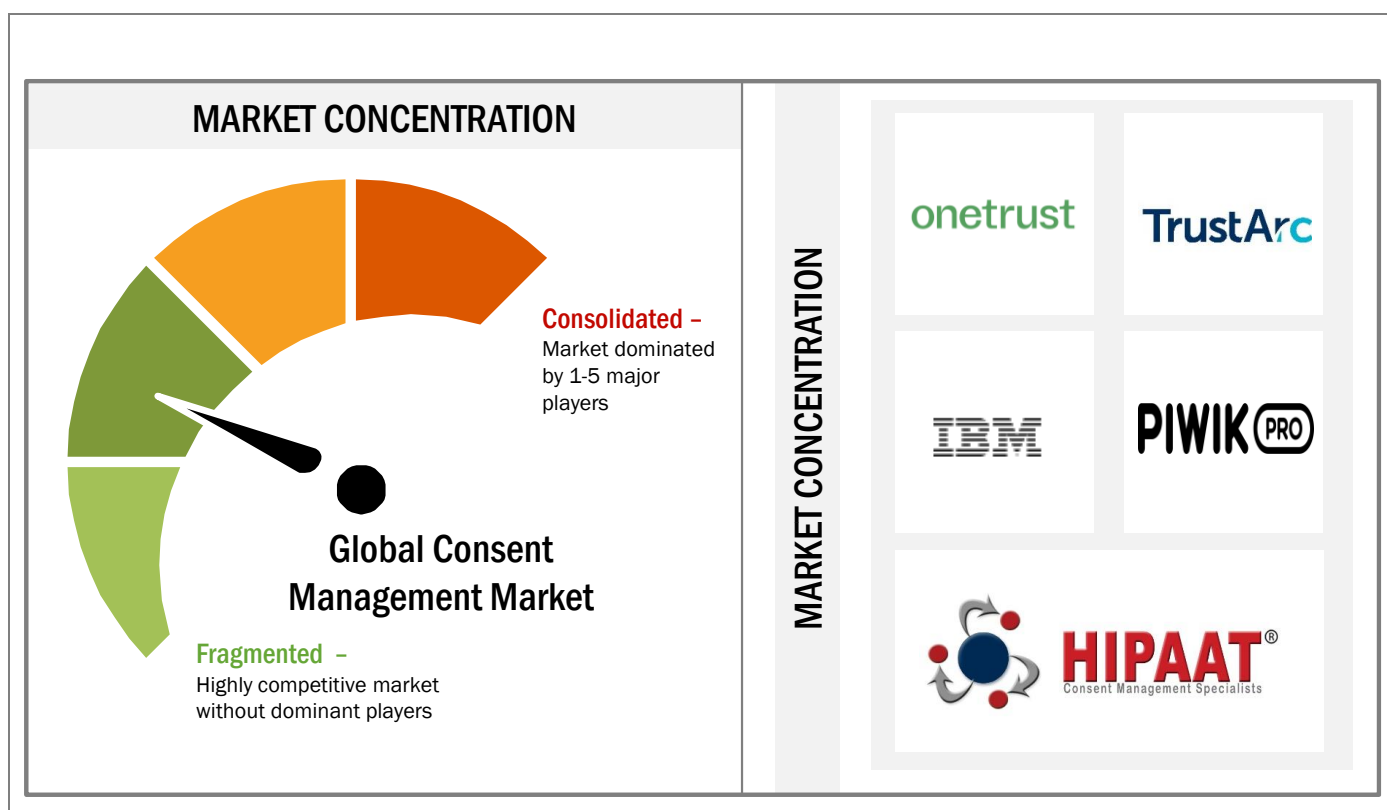
Table 119. Company Positioning & Concentration

Company	Geographical Presence	Product Portfolio	Strategic Initiatives	Company Revenue
OneTrust, LLC				
TrustArc Inc				
IBM Corporation				
Piwik PRO				
HIPAAT International Inc.				
	LOW 	MEDIUM 	HIGH 	

Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

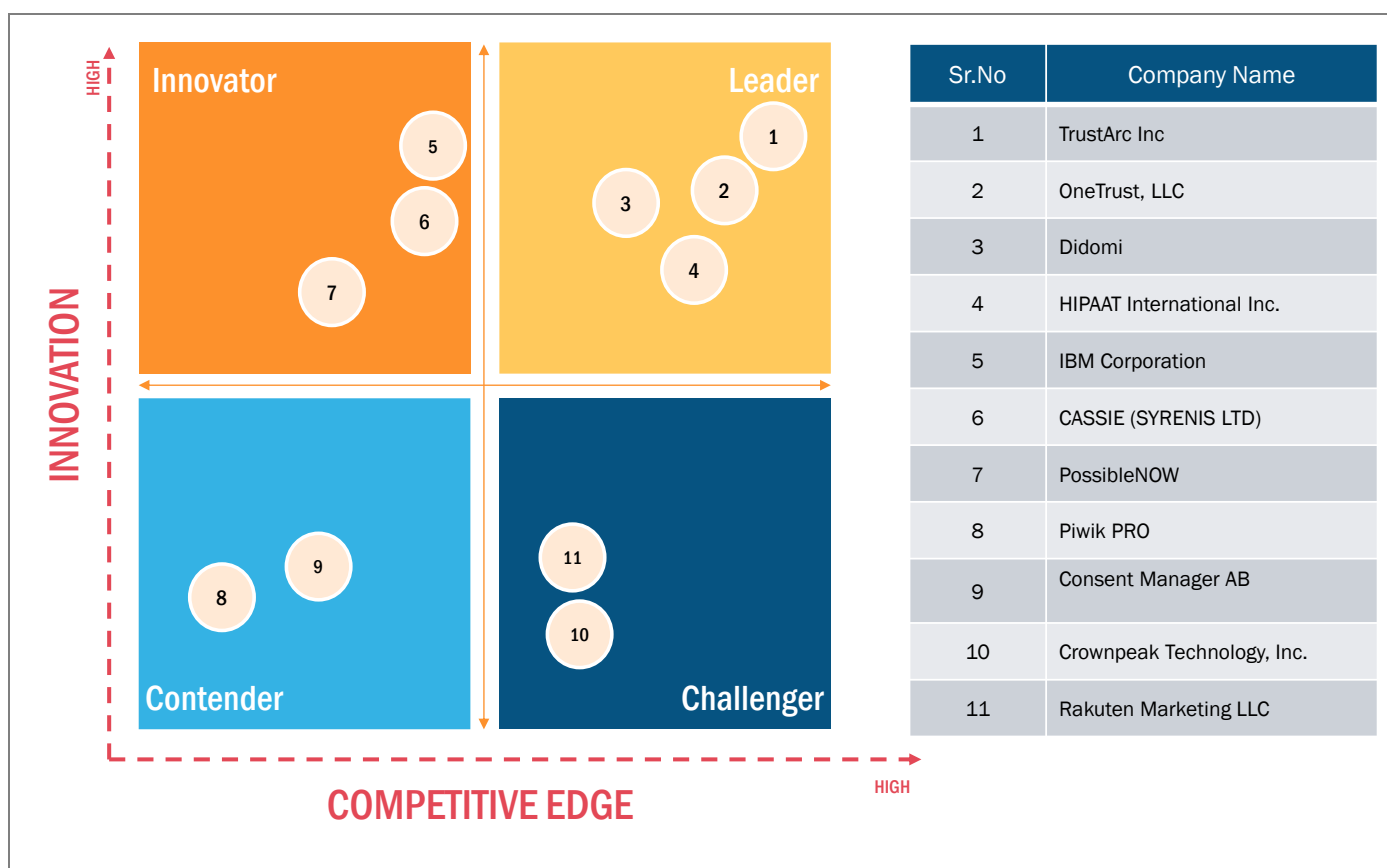
12.2 Company Positioning & Concentration

Figure 73. Heat Map Analysis By Key Players



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

12.3 Company Positioning Mapping



Source: The Insight Partners Analysis, Primary Interviews, Magazines and Journals, and Secondary Sources

13. Industry Landscape

13.1 Overview

The industry landscape chapter gives a brief knowledge about the various product developments, partnerships, mergers and acquisitions, and collaboration strategies implemented by the companies. With all these strategies, the companies enhance their product offerings and footprint globally across all industries, therefore boosting the annual revenue growth.

13.2 Market Initiative

The market initiative is a strategy adopted by companies to expand their footprint across the world and to meet the growing customer demand. The market players present in the market are mainly focusing on product and service enhancements by integrating advanced features and technologies into their offerings.

Year	News	Region
April 2020	TrustArc, the leader in privacy compliance and risk management, declared a significant expansion to the TrustArc Privacy Management Platform that resolves and automates the process of controlling privacy and data risk across the entire organization. Delivered through TrustArc's Risk Profile, the new capabilities offer a comprehensive view of risk across company processes and third-party systems and generate automated, actionable business insights.	North America
May-2020	OneTrust, declared MiTek Industries, part of the Berkshire Hathaway group, selected OneTrust to operationalize their global privacy program. MiTek uses OneTrust for their global privacy efforts, including Assessment Automation (PIA/DPIAs), Data Mapping, Data Subject Rights Requests, Cookie Compliance and Vendor Risk Management.	North America
May-2020	OneTrust, declared an expanded PrivacyConnect with new Industry Expert Panels: free online events focused on privacy best practices in specific industries. These panels will feature experts to discuss the unique privacy challenges facing Finance, Retail, Manufacturing, Technology, Hospitality and number of other industries.	North America
Feb 2022	In Feb 2022, PossibleNOW, a leading provider of consent / preference management and consumer regulatory compliance solutions, announced a strategic partnership with best-in-class privacy compliance technology provider, TrustArc. This partnership has expanded privacy & preference capabilities within their respective platforms.	North America
October 2021	The European netID Foundation announced a partnership with Usercentrics. Under this partnership, Usercentrics supports seamless integration with netID products, allowing publishers and advertisers to link consent management and login services	Europe
May 2023	Google announced that by the beginning of 2024, all the publishers and developers using Google AdSense, Ad Manager, or AdMob would be required to use a Google-certified Consent Management Platform (CMP). This new CMP will be integrated with the IAB's Transparency and Consent Framework (TCF) when serving ads to users in the European Economic Area or the UK.	North America

13.3 Product Development

The market players focus on product innovations and developments to achieve sustainable growth and to distinguish themselves among competitors present in the highly competitive market.

Year	News	Region
Jun-2023	In Jun 2023, OneTrust, the market-defining leader for trust intelligence, announced that OneTrust's consent management platform (CMP) is now Google certified. Enabling partners using Google publisher products to meet their compliance requirements with IAB Europe's Transparency and Consent Framework (TCF).	North America
Feb 2020	The new company integrated together Rakuten Marketing's expansive affiliate network, programmatic retargeting and prospecting technology with consumer insights from Rakuten Intelligence, and a unique set of global media properties so that brands can discover rich audiences and build enduring relationships including Rakuten TV, Rakuten Viber, Rakuten Viki and Rakuten France.	APAC
July 2022	Didomi launched a Consent Management Platform (CMP) and Preference Management Platform (PMP) in North America. The company's technology suite is purpose-built to meet the consent-based privacy and preference needs of various enterprises across the region. Furthermore, companies are focusing on inorganic strategies such as partnership and collaboration to provide more efficient solutions to their customers.	Europe
May 2021	DataGuard, a data privacy and information security company, launched a new Consent and Preference Management platform, DataGuard Consent Management. The platform helps capture and manage the consent and preferences of customers, users, and employees	Europe
Jul-2023	Cassie, the consent, and preference management platform serving Fortune 500 companies globally, debuted new Progressive Profiling and Identity Service features to its Cookie Solution product. The features introduce capabilities that empower marketers to create bespoke, personalized customer experiences built upon anonymous, reliable first-party data, making Cassie's Cookie Solution a more advanced alternative to traditional cookie banners.	Europe

14. Company Profiles

14.1 consentmanager AB

14.1.1 Key Facts

consentmanager AB	
Corporate Address	Haltegelvagen 1b, Vasteras 72348, SE
URL	www.consentmanager.net
Location	Europe

14.1.2 Business Description

consentmanager AB is a project of Jaohawi AB. The company has more than 10 years of experience in the field of ad technology. They offer sophisticated solutions for the advertising industry. The company is an IAB-registered CMP (Consent Management Provider) with CMP ID 31 at consentmanager.mgr.consensu.org. The company offers services in order to obtain consent from website users and make this consent available to your advertising partners. The consent manager AB CMP comes with support for 29 languages, individual Designs, Reporting, integrated A/B-testing & Design Optimizer, as well as an integrated Cookie-Crawler. As one of the few CMP-Companies that are based in Europe, the company is dedicated to making websites GDPR-compliant.

14.1.3 Products and Services

Product Name	Description
Consent Management Provider (CMP)	The company offers consent management provider solutions that are Easy to integrate, Compatible with almost all Adservers (incl. DFP/AdSense), and Fully customizable as per the customer design. GDPR Cookie Consent Features: • Easy to integrate • GDPR compliant • Fully customizable design • integrated cookie crawler • Display in more than 30 languages

14.1.4 Financial Overview

consentmanager AB is a privately owned company, and hence its financials are not available in the public domain.

14.1.5 SWOT Analysis

**STRENGTH**

- consentmanager AB has a strong focus towards providing consent management solutions. The company has helped more than 15,000 websites in becoming GDPR & CCPA compliant. In addition, the company has a wide customer base which acts as a strength for the company.

**WEAKNESSES**

- The company has its office only in Europe region. Having a lesser geographic reach compared to other players in the market might weaken the company's position from a global perspective and is acting as a weakness for the company.

**OPPORTUNITIES**

- The company should focus more towards inorganic growth strategies such as mergers and acquisitions, partnerships, and collaborations. This will help the company expand its customer base and global presence, creating an opportunity for its growth in the global market.

**THREATS**

- The company faces direct competition from some of the well-established companies that have competitive advantages such as strong cash flows and higher brand visibility. Therefore the presence of well-established players intensifies the competition and is acting as a massive threat to the company.

Source: Press Release, Newsletters

14.1.6 Key Developments

There are no recent developments for consentmanager AB in the Consent management market.

14.2 Crownpeak Technology Inc

14.2.1 Key Facts

Crownpeak Technology Inc	
Corporate Address	707 17th St., Floor 38, Denver, Colorado 80202
Telephone	+1 720 8009600
URL	www.crownpeak.com
Location	North America, Europe

14.2.2 Business Description

Crownpeak Technology Inc offers the leading, enterprise-grade, cloud-first Digital Experience Management (DXM) platform. This platform help empowers Fortune 2000 companies to quickly and easily create, install and optimize customer experiences across global digital touchpoints at scale. Besides featuring content management, personalization, search, and hosting, it is the only digital experience platform with built-in Digital Quality Management (DQM) to ensure brand integrity, best practices, and web accessibility compliance. Recently, Crownpeak Technology Inc acquired Evidon, the leading provider of simple technical solutions to complex digital Governance, Risk & Compliance (GRC) challenges, including a new Universal Consent Platform designed to help companies comply with the General Data Protection Regulation (GDPR).

14.2.3 Products and Services

Product Name	Description
Content Management System	It is built on decoupled architecture, the system separates back-end content management from the front-end delivery tier, enabling content to be published to multiple front ends, both within and outside the CMS. This allows for an accelerated development process and a greater level of customization so that the customers can generate more revenue faster than ever before.
Privacy and Consent Management	Crownpeak's Universal Consent Platform (UCP) empowers enterprises to quickly comply with global privacy laws. In addition, the platform also helps to identify and mitigate risks with ease using TagControl. Gain visibility into unauthorized third parties accessing user data and take action by blocking unwanted tags with a simple click.

14.2.4 Financial Overview

Crownpeak Technology Inc is a privately owned company and hence its financials are not available in the public domain.

14.2.5 SWOT Analysis

**STRENGTH**

- Crownpeak Technology Inc has a good relationship with its technological partners, which helps the company to enhance the capabilities of its solutions. Some of these partners are Amazon Web Services, Adobe, and Box, among others. Thus, good relations with the partners act as a strength factor for the company.

**WEAKNESSES**

- The company lags in the expansion of its business through inorganic growth strategies such as partnership and collaboration, which can help the company to expand its portfolio and client reach. Thus, the lack of the company's focus on inorganic growth strategies can hamper its growth in the market.

**OPPORTUNITIES**

- The company's focus on the strategies such as mergers and acquisitions for business development might provide new opportunities for its growth in the market. It may help the company to expand its customer base and help attain more business across the globe.

**THREATS**

- The company currently operates in North America, Europe. The complex international economic and political landscape may expose the company to risks such as civil unrest, economic and political instability, sharp exchange rate fluctuations, foreign exchange controls, sovereign debt crises, regulations on local business operations, and labor issues.

Source: Press Release, Newsletters

14.2.6 Key Developments

There are no recent developments for Crownpeak Technology Inc in the Consent management market.

14.3 HIPAAT International Inc.

14.3.1 Key Facts

HIPAAT International Inc.	
Founded	2002
Corporate Address	340 9th Street North, Suite 108 Naples, Florida 34102
Telephone	+1 905 4056299
URL	HIPAAT International Inc.com
Location	North America

14.3.2 Business Description

HIPAAT International Inc. is a healthcare software solution provider. The company was established in 2002 in response to a growing need for electronic health information exchange. The company provides consent management and auditing solutions to enable health information privacy wherever the data is shared: between healthcare providers, organizations, regions, and nationwide – ever mindful of the balance between privacy and clinical access to health information. The software enables individuals to determine who may access their personal/ protected health information (PHI), what PHI may be accessed, when it may be accessed, and under what circumstances. The consent management and auditing solutions by the company also help ensure patient privacy and clinical access to healthcare information. Further, to provide advanced solutions, the company has formed partnerships with innovative healthcare IT organizations that share our commitment to patient empowerment, interoperability, and industry standards. Some of these partners are CGI Group Inc, Red Hat, TELUS Health, and Wipro Ltd.

14.3.3 Products and Services

Product Name	Description
Consent Management and Auditing	Consent Management – incorporates access control mechanisms which allow the system to proactively block inappropriate access to a patient's PHI according to privacy policies established by the patient, healthcare organization and jurisdiction.

14.3.4 Financial Overview

HIPAAT International Inc. is a privately owned company and hence its financials are not available on the public domain.

14.3.5 SWOT Analysis



STRENGTH

- HIPAAT International Inc has formed partnerships with innovative healthcare IT organizations such as CGI Group Inc, Red Hat, TELUS Health, and Wipro Ltd that share a commitment to patient empowerment, interoperability, and industry standards. The partners represent various specialties, including electronic health records (EHRs) and portals, systems integration, identity and access management, PACS, and other applications. Thus, having such strong partners strengthen the company's position in the global market.



WEAKNESSES

- The company's business is concentrated in the North American region. The company operates in a highly competitive market with a large number of players with full geographical scope, and the short geographical proximity of the company as compared to other players which might weaken the company's position on a global perspective. Also, the company has the potential to strengthen its geographic reach in different regions to achieve a competitive market position. However, a limited geographic range is acting as a weakness for the company.



OPPORTUNITIES

- The company has a prosperous opportunity to collaborate with other market players to gain enhanced skills and talents that would further enable the company to stand out in the market. The company also has the opportunity to tap into the increasing geographic markets. By focusing on these, the firm could gain a strong foothold in these fast-developing economies.



THREATS

- As the company operates in North America, it has to develop solutions that will be compliant with government regulations like CCPA. Any negligence in complying with these regulations, the customers of the company may have to pay fines, which may hamper the company's image in the global market, acting as a threat factor.

Source: Press Release, Newsletters

14.3.6 Key Developments

There are no recent developments for HIPAAT International Inc in the Consent management market.

14.4 International Business Machines Corp

14.4.1 Key Facts

International Business Machines Corp	
Founded	1911
Corporate Address	One New Orchard Road, Armonk, New York 10504
Telephone	+1 914 4991900
URL	www.ibm.com
Location	Global
Exchange Ticker Symbol	XNYS:IBM
Number of Employees	282100
Fiscal Year End	Dec-2022

14.4.2 Business Description

International Business Machines (IBM) Corp is a provider of hybrid cloud and artificial intelligence (AI) and consulting. It manufactures and commercializes sales of computer software, hardware, and middleware. The company's technological product line includes AI, quantum computing, industry-specific cloud solutions, and consulting. The company conducts its business through four segments: Software, Consulting, Infrastructure, and Financing. Software segment assists clients in becoming data-driven and to automate, protect, and modernize environments. It combines its hybrid cloud platform with software solutions that have been optimized for that platform. It includes two business areas Hybrid Platform & Solutions and Transaction Processing. Hybrid Platform & Solutions comprises software that uses AI to assist clients in operating, managing, and optimizing their IT assets and business operations in hybrid and multi-cloud settings. It includes Red Hat, Automation, Data & AI, and Security. Red Hat offers businesses open-source solutions for hybrid, multi-cloud settings, with Red Hat Enterprise Linux, OpenShift, the hybrid cloud platform, and Ansible. Automation optimizes a variety of corporate procedures, IT operations, and automation powered by AI, Application servers, AIOps and management software, business automation tools, and integration software are all included. Data & AI enable intelligent decision-making by integrating AI across the organization and accelerating data-driven agendas.

The portfolio comprises tools that improve customer care operations, streamline self-service data consumption using a data fabric, and improve business analytics forecasts. Security develops a risk-aware, secure business by utilizing real-time analytics, orchestrating actions, and automating reactions across all touchpoints. It consists of software and services for managing threats to data and identities. Transaction Processing software supports clients mission-critical, on-premise workloads in airlines, banking, and retail industries. Consulting offers domain expertise and capabilities in company transformation and technology adoption. It creates open, hybrid cloud architectures and enhances essential business processes using technology from INM and ecosystem partners. To accelerate clients digital transformation, it gathers experts using its IBM garage method to develop business products and solutions jointly with clients. It consists of three business areas Business Transformation, Technology Consulting, and Application Operations. Business Transformation offers clients services that let them use technology at scale to transform workflows, processes, and domains, such as strategy, business process design and operations, data and analytics, and system integration. Technology Consulting assists clients with designing and implementing cloud platforms and strategies to change how businesses operate and

enable creative practices, such as application modernization for hybrid clouds using Red Hat OpenShift. Application Operations concentrate on the cloud platform and application services needed to operationalize and exploit cloud systems.

Through both customized applications and ISV/ERP packages, it supports the client's efforts to manage, optimize, and coordinate application and data workload across environments. Infrastructure is the core of the hybrid cloud stack and offers dependable, flexible, and secure solutions. It is designed to incorporate AI into mission-critical transactions and is tightly connected with IBM technologies, including Red Hat, to speed up the benefits of hybrid clouds. Additionally, it focuses on sustainable recovery services while remanufacturing and reselling used equipment. It includes two business segments Hybrid Infrastructure and Infrastructure Support. Hybrid Infrastructure offers infrastructure platforms to assist in meeting the demands of enterprise AI workload via flexible and as-a-service consumption models. It includes IBM Z and Distributed Infrastructure. IBM Z is a security, resilience, and scale transaction processing platform.

It includes IBM Z and LinuxONE. It addresses businesses' computing capacity, performance, and security needs. Linux and other platforms ready for hybrid clouds and enterprise AI are included in the IBM Z operating system software environments and z/OS, a security-rich, high-performance enterprise operating system. Distributed Infrastructure includes Power, Storage, and IBM Cloud Infrastructure-as-a-Service. Power offers high-performance servers designed and developed for big data and AI-enabled workloads optimized for hybrid cloud and Linux. Storage consists of a wide range of storage hardware and software-defined offerings, tape solutions, software-defined storage controllers, including Z-attach and distributed flash, data protection software, and network-attach storage. IBM Cloud IaaS offers computing options, Power, and storage across x86, and IBM Z as a service. Infrastructure Support operates in hybrid cloud environments and offers clients integrated services. It provides comprehensive, proactive, and AI-enabled services to maintain and raise the value and availability of clients on-premises and cloud-based IT infrastructure.

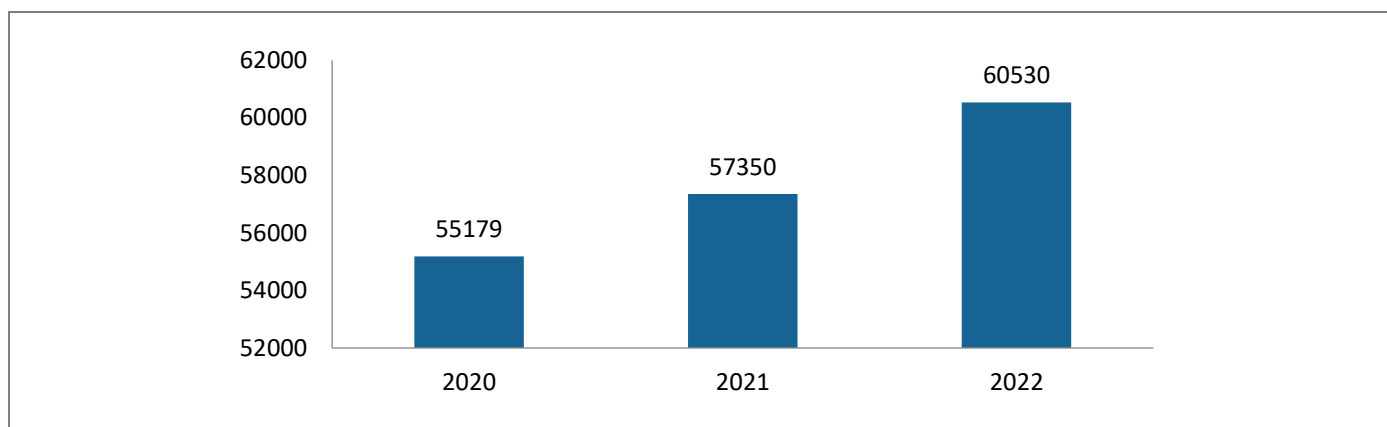
These services include open-source and cross-vendor software and solution support, maintenance for IBM products, and other technological platforms. Financing segment provides the acquisition of information technology systems, services, and software. It conducts a credit evaluation of clients before extending financing. It comprises two business areas Client Financing and Commercial Financing. Client Financing offers end-user clients leases, installment payment plans, and loans with terms of up to seven years. It also provides internal loan financing in support of IBM IaaS service agreements. It is typically utilized to purchase new and used IT hardware, software, and services in its area of competence. Commercial financing is short-term working capital for distributors and resellers, mostly IBM products.

14.4.3 Products and Services

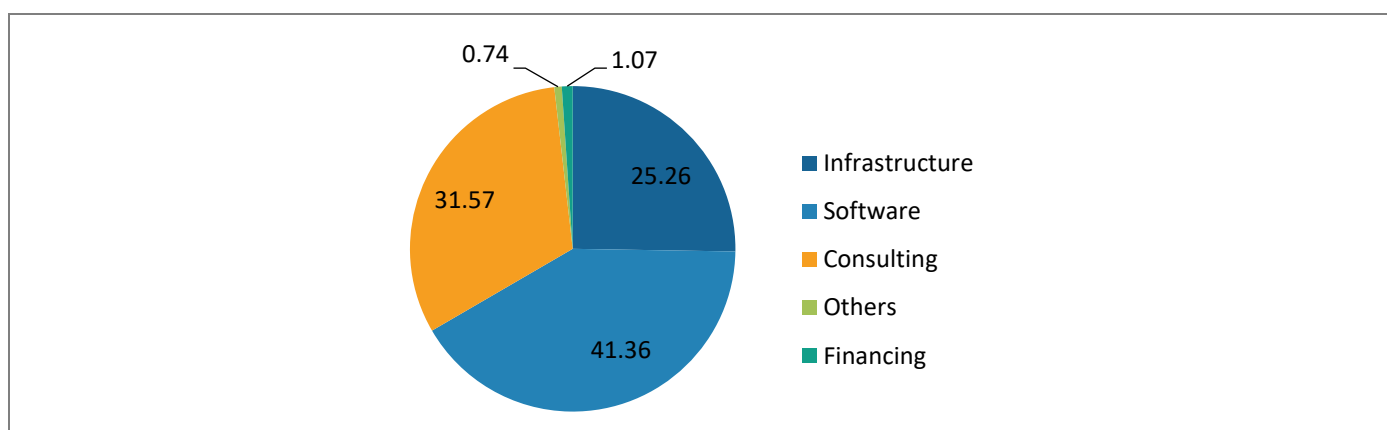
Product Name	Description
Consent Management	IBM Corporation offers consent management solutions to help capture and manage consent as required by the GDPR or any other data protection regulation. The customer can manage the consent of each person with an active or inactive record that is stored in or outside InfoSphere MDM. Tie data usage to purposes: Stipulate business purposes such as marketing promotions, communications or cookie management. For each purpose, specify access and retention parameters for relevant user attributes and to manage privacy. Create custom privacy rules: Specify conditions under which attributes and other purposes need user consent and create custom privacy rules. Search through all created rules to check for applicable conditions and to ensure coverage. Apply purposes and EULAs: Assign data usage purposes or end user license agreements (EULAs) to each application. Delegate data usage decisions to simplify updates. Maintain an audit trail of consent activity across apps. Enable self-service: Grant users the ability to securely handle basic entitlements themselves, such as password updates, while maintaining visibility and control.

14.4.4 Financial Overview

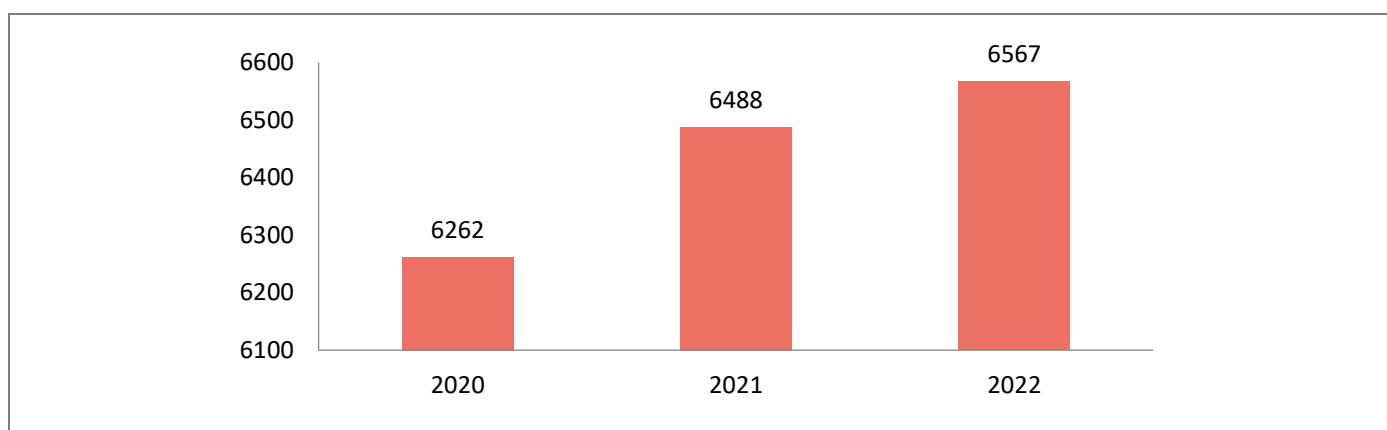
ANNUAL REVENUE (\$ MN)



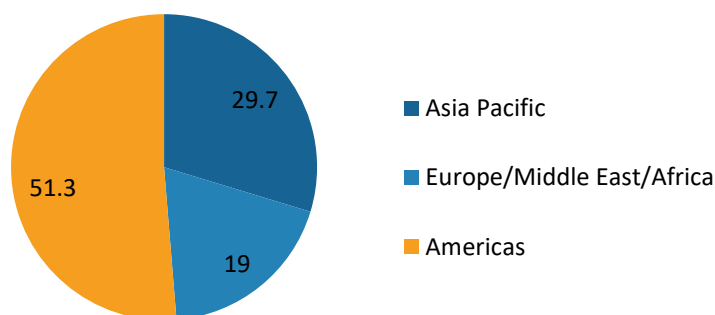
REVENUE BY BUSINESS SEGMENT, 2022(%)



R&D EXPENSES (\$ MN)



REVENUE BY GEOGRAPHY, 2022(%)



Source: Press Release, Newsletters, and Company Annual Report

14.4.5 SWOT Analysis

STRENGTH



- IBM primarily focuses on investment to propel R&D activities to capture new market areas by introducing new and innovative products. Through its global labs, the company works with clients and various company business units for short-term and mid-term innovations. The company registered 9,262 patents, which were more than any other company for the 25th consecutive year. These patents included several innovations in artificial intelligence, cognitive computing, cognitive health, cloud, cybersecurity, and other growth areas for the company.

WEAKNESSES



- The company has generated the least revenue from the Europe and MEA region in the year 2022. This entails that the company has a lack of focus on these regions. This may hamper the profitability of the company in the long run.

OPPORTUNITIES



- IBM Corporation's growth depends on continuous innovation and regular improvement in the capability of its inorganic strategies, including partnerships, collaborations, and acquisitions. Several enterprises and companies are looking forward to use digital technology to transform operations, structure and also to alter their products and services in order to have a large number of customer engagement in their portfolio. The company has an opportunity to grow its business through partnerships, contractual alliances with organizations on the part of digital transformation. Such strategies will help the company to become a strategic provider in the consent management market.

THREATS



- The company operates globally and has manufacturing, sales, and distribution facilities worldwide and makes investments and generates revenues that are denominated in foreign currencies. As a result of it, a significant amount of revenue generated in currencies other than Euros. Hence, volatile exchange rates may have an adverse effect on its financial results. Therefore, fluctuations in foreign currencies might impact the company's performance, thereby acting as a weakness in the current market scenario.

Source: Press Release, Newsletters

14.4.6 Key Developments

There are no recent developments for International Business Machines Corp in the Consent management market.

14.5 Trustarc Inc

14.5.1 Key Facts

Trustarc Inc	
Founded	1997
Corporate Address	2121 N. California Blvd. Suite 290 Walnut Creek, California 94596
Telephone	+1 415 5203490
URL	www.trustarc.com
Location	North America

14.5.2 Business Description

TrustArc is one of the leaders in providing privacy compliance and data protection products and solutions. The company delivers a combination of innovative technology, consulting, and TRUSTe certification solutions. These services and technology together respond to all phases of the privacy program management. The TrustArc Platform has gained broad experience in diversified industries. The company is supported by a global team of experts throughout the Americas, Asia, and Europe. TrustArc, through its experience, of over eight years it has helped to cater to more than 1000 clients globally. The product portfolio of the company is encompassed with privacy platform, privacy consulting, GDPR validation, GDPR compliance, and CCPA compliance, as well as privacy training.

14.5.3 Products and Services

Product Name	Description
Cookie Consent Manager	Cookie Consent Manager is part of the TrustArc Platform which provides capabilities to manage all phases of privacy compliance. Cookie consent manager provides a flexible, and a proven solution to address cookie compliance, including support for visual customization and branding. Cookie Consent Manager Features: • Cookie Banner • Website Scanning • Cookie Preferences Management • Tracker Database • Custom Branding • Compliance Reporting • Tag Management Integration • Multi-Language Support • Browser Language Detection • IP-based Geo Detection • Cross-Domain Consent • Configurable Cookie List & Disclosures • Custom Website Scanning Configuration • IAB Framework Support (EU and CCPA) • Custom Scan Support (e.g., behind login)

14.5.4 Financial Overview

Trustarc Inc is a privately owned company and hence its financials are not available in the public domain.

14.5.5 SWOT Analysis

**STRENGTH**

- TrustArc Inc, through its data protection & privacy partner program, helps in expanding business operations through reselling privacy compliance solutions. The program is developed for systems integrators, MSSPs, consulting firms, law firms, digital marketing agencies, legal tech companies, and other companies offering. In addition, the company also helps to assist incident response, security, data discovery, GRC, info security, and more technology companies indulge in the business of providing compliance solutions. The company's wide compliance solutions strengthen its brand image among the competitors.

**WEAKNESSES**

- TrustArc is amongst the leader in offering data protection and privacy compliance products and solutions for more than two decades. The company has come up with innovative technology, TRUSTe certification solutions, and consulting services that address every stage of the consent management platform. However, initiatives taken by the company comparatively exclude strategies for acquisition and mergers. Henceforth, less focus on inorganic growth strategies might hinder TrustArc's profit margin.

**OPPORTUNITIES**

- GDPR privacy regulations have increased demand for technology solutions to operationalize managing privacy compliance on an ongoing basis. GDPR is a regulation in EU law on data protection and privacy for all individuals within the European Union (EU) and the European Economic Area (EEA). The increased reliance on technology has led to information security teams playing a larger role in managing data at companies. As per the law many retail, hospital, educational institutes, etc. are looking for an optimum solution for consent management.

**THREATS**

- The market in which TrustArc operates is very competitive. The company competes with large and well-established players in the market, such as OneTrust LLC and IBM Corporation. The companies operating in the market compete against one another on the basis of technological development and the prices of the products. If the company fails to provide better and advanced consent management product to the customers, it may directly affect the overall competitive strength of the company. This might further affect the cash flow as well as the profitability of the company, as the customers will shift to other players in the market.

Source: Press Release, Newsletters

14.5.6 Key Developments

Date	Development	Category	Description
Apr-2020	TrustArc Expanded Data Privacy Platform to Automate and Simplify Management of Privacy and Third-Party Risk	Company News	TrustArc, the leader in privacy compliance and risk management, declared a significant expansion to the TrustArc Privacy Management Platform that resolves and automates the process of controlling privacy and data risk across the entire organization. Delivered through TrustArc's Risk Profile, the new capabilities offer a comprehensive view of risk across company processes and third-party systems and generate automated, actionable business insights.

Source: Press Release, Newsletters

14.6 OneTrust LLC

14.6.1 Key Facts

OneTrust LLC	
Founded	2016
Corporate Address	1200 Abernathy Rd Suite 700 Atlanta, Georgia 30328
Telephone	+1 844 8477145
URL	www.onetrust.com
Location	North America, Europe, APAC
Number of Employees	2000

14.6.2 Business Description

OneTrust, LLC is engaged in developing a Web-based enterprise software platform for data privacy compliance. The product portfolio of the company comprises of privacy program management, technology integrations, marketing & web compliance, GDPR & global privacy solutions, and products for small & medium enterprises, while offering professional and training & certification services. OneTrust caters requirements of more than 2500 customers, from small & medium enterprises to multinational companies in 100 countries. Moreover, the OneTrust Partner Program of the company enables law firms, consultants, and trusted advisors to take advantage of OneTrust to organize privacy-focused engagements with clients. The company has a total of 6 global offices, out of which London and Atlanta are company headquarters, and other additional imprints through offices located in Melbourne, Bengaluru, Hong Kong, and Munich.

14.6.3 Products and Services

Product Name	Description
Universal Consent and Preference Management	- Embed transparent data collection into the customer experience - Provide customers with visibility into collected data - Honor customer preferences across touchpoints - Centralize and synchronize your customer consent and preference data by using pre-built integrations to sync with modern SaaS or legacy software to synchronize data across third-party MarTech tools.

14.6.4 Financial Overview

OneTrust, LLC is a privately owned company and hence its financials are not available in the public domain.

14.6.5 SWOT Analysis

**STRENGTH**

- OneTrust LLC is a privacy management and marketing compliance software company and is a major strategic leader in the consent management market. The company is highly recognized in the consent management software market. For instance, the company is acknowledged as the fastest growing company in Atlanta business chronicle with Pacesetter awards in 2019. Similarly, it has received SC awards for providing the best regulatory compliance solution to an exhaustive customer portfolio. Many other awards and recognitions strengthen OneTrust to maintain its brand image among its competitors and in the market.

**WEAKNESSES**

- OneTrust is a leading and widely used consent management technology platform. The company serves the requirement of over 2500 customers of diversified industries. However, the company's focus on catering to the healthcare industry is limited. Consent management is a system, process, or set of policies that enable patients to choose what health information they are willing to permit their healthcare providers to access and share. Due to this, the demand for consent management software is gaining high adoption globally. OneTrust lags in serving healthcare sectors, which might hamper the results of business operations

**OPPORTUNITIES**

- OneTrust is experiencing an ongoing adoption of consent management software among various industries. The company introduced privacy program management which enables the expertise of teams to secure confidential data from getting sold to third parties. OneTrust has an opportunity to propel the adoption of products through the introduction of new features. For instance, in Jun 2023, company announced that its consent management platform (CMP) is Google certified, which will ensure that it meets the compliance requirements with IAB Europe's Transparency and Consent Framework (TCF). Also, the company may enter into a strategic & contractual alliance or partnership to understand the adversary attack landscape to help customers maintain greater privacy of their personal information.

**THREATS**

- OneTrust is relatively new in the consent management software market and therefore is subjected to face a high degree of competition from well-established players. The other large players in the market are constantly focused on the research and development of innovative products and introducing them in the market. The customers may get attracted towards the products due to the lower cost and new features introduced in the product, which is subjected to be a significant threat to the company. Moreover, outdated technologies are subjected to increased risk and may affect the product life cycle in the future period, which might create an obstacle in the company's growth.

Source: Press Release, Newsletters

14.6.6 Key Developments

Date	Development	Category	Description
Jun-2023	The Consent Management Platform of OneTrust is now Google certified.	Product News	In Jun 2023, OneTrust, the market-defining leader for trust intelligence, announced that OneTrust's consent management platform (CMP) is now Google certified. Enabling partners using Google publisher products to meet their compliance requirements with IAB Europe's Transparency and Consent Framework (TCF).
May-2020	MiTek Industries, a Berkshire Hathaway Company, Selected OneTrust for Global Privacy Management	Company News	OneTrust, declared MiTek Industries, part of the Berkshire Hathaway group, selected OneTrust to operationalize their global privacy program. MiTek uses OneTrust for its global privacy efforts, including Assessment Automation (PIA/DPIAs), Data Mapping, Data Subject Rights Requests, Cookie Compliance, and Vendor Risk Management.
May-2020	OneTrust Launched PrivacyConnect Industry Expert Panels	Company News	OneTrust, declared an expanded PrivacyConnect with new Industry Expert Panels: free online events focused on privacy best practices in specific industries. These panels will feature experts to discuss the unique privacy challenges facing Finance, Retail, Manufacturing, Technology, Hospitality, and a number of other industries.

Source: Press Release, Newsletters

14.7 Piwik PRO LLC

14.7.1 Key Facts

Piwik PRO LLC	
Founded	2013
Corporate Address	222 Broadway, 19th Floor, New York 10038
Telephone	+1 888 4440049
URL	www.piwik.pro
Location	North America, Europe

14.7.2 Business Description

Piwik PRO provides a self-hosted web analytics platform for governments and businesses requiring privacy compliance and data ownership. Piwik PRO was founded in 2013 and is based in Wroclaw, Poland, with locations in Köln, Germany; Rotterdam, the Netherlands; and New York. New York. Piwik PRO operates as a subsidiary of Digimedia Sp. z o.o. The company provides its products through segments such as web analytics, mobile app analytics, SharePoint analytics, custom reports, tag manager, customer data platform, GDPR consent manager, and on-site retargeting. Moreover, the company, with its extensive portfolio of products, serves industries that include finance & banking, retail & e-commerce, government, media agencies, etc. Piwik PRO provides consent management products through the GDPR consent manager product segment. The company serves government, finance and banking, telecoms, NGOs, higher education, media and advertising, hi-tech, and e-commerce markets.

14.7.3 Products and Services

Product Name	Description
Consent Manager	The consent manager provides an easy and transparent consent collection. It helps to categorize data from analytics and tag manager so that data purposes always agree with the consent received. Features: • GDPR consents only for EEA residents • Multiple tracking options • Valid consent collection • Withdrawals & amendments • Zero cookie load

14.7.4 Financial Overview

Piwik PRO LLC is a privately owned company, and hence its financials are not available in the public domain.

14.7.5 SWOT Analysis

**STRENGTH**

- Piwik PRO has a strong presence globally and has offices in major countries such as Poland, the United States, Germany, the Netherlands, the United Kingdom, France, Spain, etc. The company mainly serves customers in a wide range of industries, such as finance & banking, retail & e-commerce, government, and media agencies, which provides a vast client base for the company. Some of the clients include Würth Group, European Commission, Microsoft, The Hewlett-Packard Company, Accenture, etc. With the well-established client base and brand image, the company occupies maximum share in the global consent management market. Thus, the company is anticipated to hold a strong position in the market due to its strong client base and global presence.

**WEAKNESSES**

- The company currently serve the customer in North America, Europe, and the Middle East. It has a limited presence in the Asia Pacific and other developing regions. There are many business organizations which are operating in this region that are raising the need for more advanced consent management solutions. Not having a presence in the region may hamper the overall revenue of the company compared to its competitors, acting as a weakness for the company.

**OPPORTUNITIES**

- Piwik PRO offers a wide range of products to a variety of industries, such as finance & banking, retail & e-commerce, government, media agencies, etc. Currently, a large number of service providers are available in the market and differentiation for choice has become very important. The consent management solution for every industry varies according to the type of industry served. As every customer is unique with their set of demands or needs, it is necessary to identify that uniqueness and cater to the demand. This is the key strategy the companies may use to attract customers. Thus, the Piwik PRO should focus on customized product development based on the specific requirement of the customers. This may result in providing an optimum solution to the customers and ultimately result in high profitability for the company.

**THREATS**

- The consent management market has a huge developing potential which has resulted in the entry of many small and medium-sized companies to enter the market. As these new entries may provide cheaper solutions to the customers, the competition may rise. Thus, the entry of small firms in the market is anticipated to create a threat for the companies in the near future.

Source: Press Release, Newsletters

14.7.6 Key Developments

There are no recent developments for Piwik PRO LLC in the Consent management market.

14.8 PossibleNOW Inc

14.8.1 Key Facts

PossibleNOW Inc	
Founded	2000
Corporate Address	4400 River Green Parkway, Duluth, Georgia 30096
Telephone	+1 866 3530601
URL	www.possiblenow.com
Location	North America

14.8.2 Business Description

PossibleNOW is a pioneering and leading provider of customer consent, preference, and regulatory compliance solutions. Leveraging their MyPreferences technology, processes, and services, they enable relevant, trusted, and compliant customer interactions. Their platform empowers large, complex organizations to collect, centralize, and distribute customer communication consent and preferences, while their DNCSolution ensures adherence to Do Not Contact regulations with a 100% compliance guarantee. Strategic consultants at PossibleNOW take a holistic approach, creating strategic roadmaps, planning technology deployments, and designing customer interfaces to enhance customer experiences and loyalty while mitigating compliance risk. Specialties include Preference Management, Do Not Contact Compliance, Information Security Compliance, Do Not Call Compliance, Compliance Training, Direct Marketing Compliance, Marketing Solutions & Data Services, ePrivacy, TCPA Compliance, CAN-SPAM Compliance, CASL Compliance, Consent Management, Customer Insights, Voice of Customer (VoC), Strategic Consulting, Customer Preferences, and Preference and Consent Collection.

14.8.3 Products and Services

Product Name	Description
Consent Management Software	Consent and preference management software was designed to address evolving local and global regulations. It helps solve consent management requirements by providing virtually unlimited configuration capabilities based on unique use cases, local legislation requirements, and other mitigating factors. Features: Consent Management Software • Deep segmentation capabilities for customer consent and other zero-party data • Customizable consent language based on locale, geolocation, customer types, etc. • Support express consent collection through a single step or a multi-step process, depending on your use case • Storage of the consent using pseudonymous IDs (nicknames) • Ability for consent to enable additional preference and insight collections along the customer journey • Revocation of consent to automatically opt-out of hierarchical consents • Consent audit history including consent language, date/time, and source of consent capture

Product Name	Description
	Features: Preference Management Platform • Transparency - Show customers what data is being collected and how it's used, every step of the way. • Control - Provide consumers with complete control over their preferences, consents, profile, and sight data at every interaction. • Respect - Share data across the organization to honor customer choices at every interaction and across all channels. • Value Exchange - Share relevant content and establish reciprocity of value to enrich the relationship that turns customers into advocates.

14.8.4 Financial Overview

PossibleNOW Inc is a privately owned company and hence its financials are not available in the public domain.

14.8.5 SWOT Analysis

**STRENGTH**

- PossibleNOW Inc has a strong customer base across the globe which helps the company to generate more revenue. PossibleNOW technology allows over 600 global brands to listen, remember and respond to their customers by leveraging the information that matters most, which includes customer communication permissions and preferences.

**WEAKNESSES**

- The company has not entered into an alliance with other service-providing companies, which directly showcases the negative impact of the company related to relationship management. The company can expand its presence in developing countries through business alliances with the service providers.

**OPPORTUNITIES**

- The company can strengthen its position in the global market by introducing products for healthcare and education institutes. This would help the company to expand its product reach to various industries. Thus, new product launches are anticipated to help the company in the development of the business in the future.

**THREATS**

- The consent management solutions which are provided by the company are needed to be in compliance with government regulations such as CCPA. Any update in the existing laws and the emergence of new ones may require continuous adjustments to consent management platforms, potentially leading to higher compliance costs and implementation challenges for both vendors and customers.

Source: Press Release, Newsletters

14.8.6 Key Developments

Date	Development	Category	Description
Feb-2022	PossibleNOW and TrustArc Announce Strategic Partnership	Partnership	In Feb 2022, PossibleNOW, a leading provider of consent/preference management and consumer regulatory compliance solutions, announced a strategic partnership with best-in-class privacy compliance technology provider, TrustArc. This partnership has expanded privacy & preference capabilities within their respective platforms.

Source: Press Release, Newsletters

14.9 Rakuten Marketing LLC

14.9.1 Key Facts

Rakuten Marketing LLC	
Founded	1996
Corporate Address	Rakuten Crimson House 1-14-1 Tamagawa Setagaya Tokyo 158-0094
Telephone	+81 50 55816910
URL	www.rakutenadvertising.com
Location	South and Central America, North America, Europe, APAC

14.9.2 Business Description

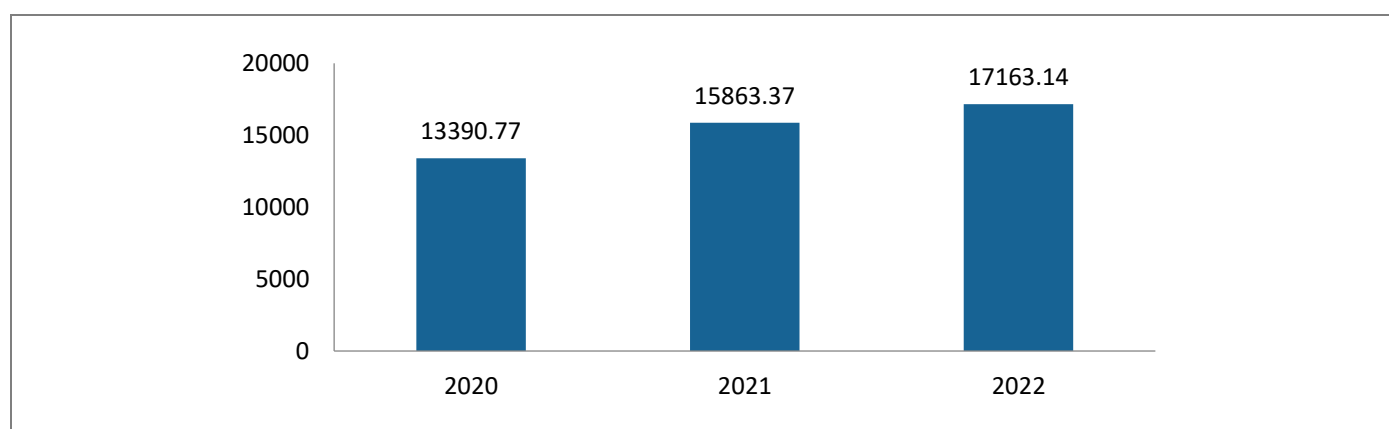
Rakuten Advertising is a subsidiary of Rakuten Inc. and operates as an online marketing company. It specializes in providing affiliate marketing that includes publisher services and advertisers, display services including display strategies, display advertising, and display solutions. Its offerings also include campaign strategy and forecasting, competitive intelligence reporting, bid management, ROI and budget monitoring, keyword research, landing page, and ad copy testing. It also provides a consent management platform for brands, advertisers, and publishers that helps them gain consent under the GDPR. The company was formerly known as LinkShare Corporation and was founded in 1996. At present, the company is based in New York, with additional offices in Australia, Brazil, Japan, Singapore, the United Kingdom, France, Germany, and the United States.

14.9.3 Products and Services

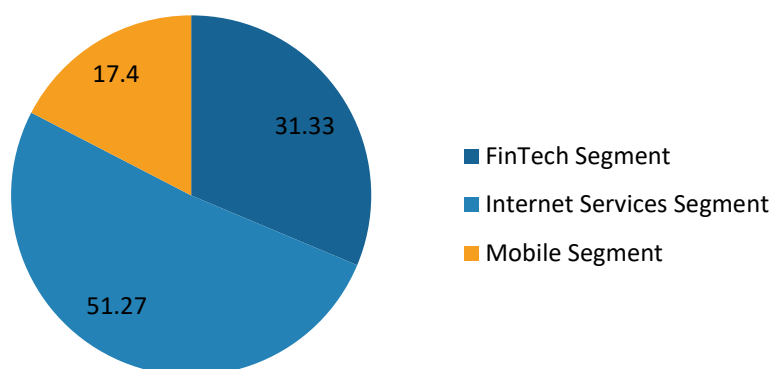
Product Category	Product Name	Description
Consent Management	Consent Management Platform	The Consent Management Platform offered by Rakuten Advertising ensures GDPR compliance and helps retailers, advertisers, and publishers manage data breaches effectively. Simplify data consent and protect personal information with their solution.

14.9.4 Financial Overview

ANNUAL REVENUE (\$ MN)



REVENUE BY BUSINESS SEGMENT, 2022(%)



Source: Press Release, Newsletters, and Company Annual Report

14.9.5 SWOT Analysis

**STRENGTH**

- Rakuten Marketing had co-developed the open-source CMP as a founding contributor to the DigiTrust (now IAB Tech Lab), a CMP Development Working Group. The working group included IAB Tech Lab members who, like Rakuten Marketing, were committed to open-source software development in addition to IAB Tech Lab identity and privacy standards. The CMP provided by the company is directly coupled by design to the DigiTrust neutral ID and namespace and may only be distributed by contributing members of the CMP Development Working Group. The solutions by the company are flexible platforms that ensure brands, advertisers, and publishers collect valid consumer consent and persistently honor consumer preferences, acting as a strengthening factor for the company.

**WEAKNESSES**

- As Rakuten Marketing is a wholly owned subsidiary of Rakuten Inc., the fluctuations in its segmental profits might impact its future business strategies and investment planning. This might be hindering the growth of its newly launched consent management platform. Also, owing to the rising competition on the global level, the uncertainty in the profit earning of the parent organization may adversely impact Rakuten Marketing LLC's growth.

**OPPORTUNITIES**

- Rakuten, with its expansion, should also focus on providing its clients with expertise in business as well as technology consulting. The successful strategy of the company provides it an opportunity to frame strategies to offer innovative products and services and expand its footprint. Also, the strong market image of the company makes it easy to venture into a new geographical market. The company adopts acquisitions, joint ventures, or strategic arrangements to contribute to the future growth of the company.

**THREATS**

- The company's business, financial condition, or operating results can be wedged by several macroeconomic factors, which could affect its stock price. These factors include unemployment, consumer confidence & spending levels, global factory production & credit market conditions, and consumer credit availability, among others. Furthermore, political insecurity in the markets in which the company work can adversely impact their business, such as foreign exchange export and import controls, tariff & other trade barriers, and exchange or price controls

Source: Press Release, Newsletters, and Company Annual Report

14.9.6 Key Developments

Date	Development	Category	Description
Feb-2020	Rakuten Launched Rakuten Advertising as a Premier Destination for Brands to Discover Customers and Engage Audiences	Product News	The new company integrates together Rakuten Marketing's expansive affiliate network, programmatic retargeting and prospecting technology with consumer insights from Rakuten Intelligence, and a unique set of global media properties so that brands can discover rich audiences and build enduring relationships including Rakuten TV, Rakuten Viber, Rakuten Viki and Rakuten France.

Source: Press Release, Newsletters, and Company Annual Report

14.10 Didomi SAS

14.10.1 Key Facts

Didomi SAS	
Corporate Address	137 Boulevard de, Sebastopol, Paris 75002
URL	www.didomi.io
Location	North America, Europe

14.10.2 Business Description

Didomi is a prominent SaaS platform that specializes in delivering comprehensive solutions to assist companies in achieving compliance with stringent data privacy regulations such as GDPR and CCPA. With a strong commitment to placing customer choice at the heart of their strategies, Didomi empowers organizations to seamlessly manage and obtain customer consent, ensuring compliance with global data privacy laws, fostering higher customer engagement, and building unwavering consumer trust. At the core of Didomi's offerings is their highly acclaimed Multi-Regulation Consent Management Platform (CMP), which enables companies to effortlessly collect, share, and manage user consent on a global scale. This cutting-edge platform grants consumers the freedom to declare their data sharing preferences, specify authorized data recipients, and tailor their communication preferences with favored brands. Moreover, Didomi boasts a customizable Preference Management Platform (PMP) that facilitates the collection of consent-based, zero-party data.

This transparent, efficient, and trusting relationship between businesses and consumers results in enriched brand engagement and heightened customer satisfaction. Catering to the needs of privacy experts such as CIOs, Data Protection Officers, Legal & Compliance officers, Didomi offers a highly efficient Privacy Request module. This feature streamlines the management of end-user privacy requests, ensuring swift and compliant responses, and enhancing the overall privacy management process. Additionally, Didomi provides clients with its advanced Compliance Monitoring system, delivering daily scanning of site tracker activity and data breach detection.

14.10.3 Products and Services

Product Category	Product Name	Description
Consent Management	Consent Management Platform	The Consent Management Platform offered by Didomi is a comprehensive solution enabling businesses to collect and manage user consent and preferences across domains and devices. With advanced customization options, world-class customer support, and compliance with global privacy regulations, it streamlines data privacy management for businesses of all sizes.

14.10.4 Financial Overview

Didomi SAS is a privately owned company and hence its financials are not available on the public domain.

14.10.5 SWOT Analysis

**STRENGTH**

- Didomi's strength lies in offering a comprehensive solution for data privacy compliance. With its Best-in-class Multi-Regulation Consent Management Platform, Customizable Preference Management Platform, Privacy Request module, and Advanced Compliance Monitoring, it enables companies to easily manage and optimize their privacy strategy, fostering trust and engagement with customers.

**WEAKNESSES**

- The company majorly operates in European Region and has less focus on other regions such as North America, APAC, and others. This may impact the profitability and market share of the company in that region.

**OPPORTUNITIES**

- The increasing global focus on data privacy and stringent regulations like GDPR and CCPA presents a significant growth opportunity for the consent management market. Organizations across industries seek advanced solutions to comply with these laws, driving demand for robust and user-friendly consent management platforms. As data breaches become more prevalent, businesses are compelled to prioritize customer consent and privacy, making the market ripe for innovation and expansion.

**THREATS**

- The increasing consumer awareness about data privacy rights may result in higher expectations, putting pressure on companies to maintain transparent and secure consent practices. Failure to meet these expectations could lead to reputational damage and loss of trust, posing a threat to the market's growth and stability.

Source: Press Release, Newsletters

14.10.6 Key Developments

Date	Development	Category	Description
July-2022	Didomi launched a Consent Management Platform (CMP) and Preference Management Platform (PMP) in North America	Product Launch	Didomi launched a Consent Management Platform (CMP) and Preference Management Platform (PMP) in North America. The company's technology suite is purpose-built to meet the consent-based privacy and preference needs of various enterprises across the region. Furthermore, companies are focusing on inorganic strategies such as partnership and collaboration to provide more efficient solutions to their customers.

Source: Press Release, Newsletters

14.11 Cassie (Syrenis Ltd)

14.11.1 Key Facts

Cassie (Syrenis Ltd)	
Founded	2000
Corporate Address	Vanguard House Keckwick Lane, Daresbury, Warrington, England WA4 4AB
Telephone	+44 20 45519501
URL	trustcassie.com
Location	North America, Europe

14.11.2 Business Description

Cassie is a Consent and Preference Management Platform (CMP) developed by Cassie (Syrenis Ltd) founded in 2006. It is a cloud-based platform that helps organizations manage consent and preferences for data processing in compliance with global privacy laws, such as the General Data Protection Regulation (GDPR). Cassie offers a variety of features such as consent management, preference management, cookie management, identity service, progressive profiling, cross-domain consent, connector service, data export, DSARs, RoPA, APIs, Connected TV. The company serves countries such as UK, Canada, USA.

Cassie is a flexible, secure, easy to use consent and preference management platform. It captures a variety of customer data - including personally identifiable information (PII), marketing consents and preferences - across multiple customer touchpoints – from websites, email marketing and CRM systems, as well as contact centers and internet-enabled devices. With more than 400 APIs, Cassie can connect to an extensive list of third-party applications, allowing it to integrate with existing IT platforms and to function seamlessly across both customer-facing and internal applications.

Moreover, Cassie's flexible structure enables the solution to be customized and branded according to user requirements. The platform allows organizations to configure data-matching rules and business processes according to their particular business model. Cassie is designed for global organizations with its multilingual, multi-brand functionality. At the same time, with its inbuilt privacy by design, it enables clients to comply with all regulatory requirements, regardless of geography. This flexibility allows clients to achieve compliance and creates a highly personalized interaction with every customer.

Cassie offers a self-service model that not only enables administrators to manage the way their organization collects customer data but also at the data capture front-end, enabling customers to manage their own consents and preferences in a simple to use customer preference portal. This customer-centric approach allows organizations to engage more closely with their consumers, enabling them to tailor their personal marketing programs according to their own preferences.

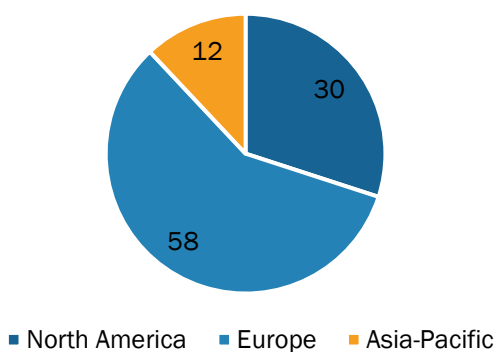
Cassie operates as a SaaS model and is highly scalable, capable of rapidly processing vast amounts of customer data and huge numbers of data subjects. The harmonization engine at the heart of Cassie provides a single source of truth so that every interaction that an individual data subject has with an organization – regardless of channel – can be tracked and personalized to improve the customer experience.

14.11.3 Products and Services

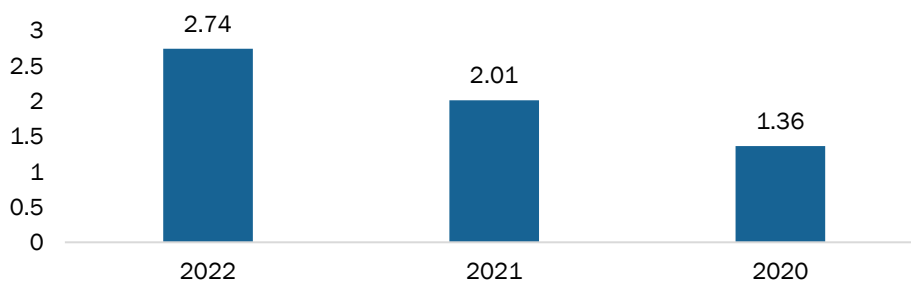
Product Name	Description
Consent Management Platform	This platform helps organizations comply with key regulations such as GDPR and CCPA, which require organizations to obtain valid and explicit consent from users before collecting and using their personal data for certain purposes. • Cassie: centralized consent communication preference ○ Connect consent across stakeholders, third party suppliers, platforms and channels ○ Communicate with customers on their terms ○ Create a single source of truth ○ Compliance by default • Cassie API first solution has following features: ○ Collect data from any touchpoint ○ Identify, profile and match data ○ Connect all existing system in the organization's eco-system ○ Honor data subject requests ○ Build customer centric preferences ○ Enable global compliance with regional business rules and extensive metadata.

14.11.4 Financial Overview

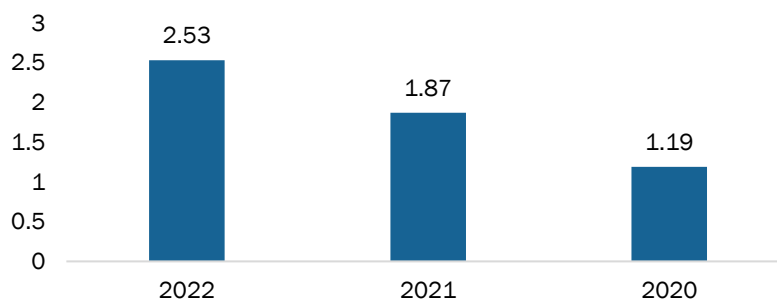
REVENUE BY GEOGRAPHY, (%)



REVENUE BY Year, (%)



GROSS PROFIT BY YEAR



Source: Press Release, Newsletters

14.11.5 SWOT Analysis

**STRENGTH**

- Cassie has many advantageous features such as, privacy and security by design at its core, the ability of high volume and speed data flow, extensive data model and flexibility, unlimited meta data and key value pairs means you can store any additional data you want against consent, flexible to any market & any data scenario, 121 consent capability between 2 external parties, anonymous progressive profiling of preferences, improved user experiences with cross domain consent, it acts as a central preference, and connecting to vertically any tech stack.

**WEAKNESSES**

- Cassie acknowledges a limited brand recognition and market share compared to established competitors, which can make it harder to penetrate the market and attract new customers.

**OPPORTUNITIES**

- Cassie can explore opportunities to expand its operations into new geographic markets, especially regions where data protection regulations are becoming more stringent. Moreover, collaborating with other technology providers, privacy-focused organizations or management consulting firms could help Cassie expand its reach and offer more comprehensive solutions.

**THREATS**

- The consent management market is becoming more competitive with the entry of new players and the expansion of existing ones, potentially squeezing Cassie's market share.

Source: Press Release, Newsletters

14.11.6 Key Developments

Date	Development	Category	Description
Jul-2023	Consent and Preference management platform Cassie debuted first-party data features to empower marketers and improve the consumer experience.	Product Launch	Cassie, the consent, and preference management platform serving Fortune 500 companies globally, debuted new Progressive Profiling and Identity Service features to its Cookie Solution product. The features introduce capabilities that empower marketers to create bespoke, personalized customer experiences built upon anonymous, reliable first-party data, making Cassie's Cookie Solution a more advanced alternative to traditional cookie banners.
2022	Cassie Identity Service	New product development	What Allows clients to compliantly retain the correct identity of returning visitors even if the browser enables privacy settings and removes cookies. How It centrally stores the unique visitor identifier, along with any analytic identifiers that have been consented to. This allows Cassie to regenerate the original visitor ID and any consented cookies in cases where browsers have removed cookies (i.e. ITP/ETP) . Why Helps businesses collect and attribute accurate data from returning visitors to optimize campaigns and improve the user experience.
Q2 2023	Progressive Profiling	New product development	What Cassie's Progressive Profiling module enables marketers collect Zero/first party data by asking non-intrusive questions and build anonymous preference profiles. How Through client specific business rules, it serves non-intrusive pop-ups (e.g. questions, surveys or polls) during the digital journey to build anonymous preference profiles stored against a unique identifier. Why Empowers marketing teams with deeper preference insights to inform strategic decisions. When PII data is captured the historic preference profiling data syncs to enable personalized content that improves user engagement.
Q2 2023	Cross-Domain Consent	New product development	What For large organizations with multiple brand domains, Cross-Domain Consent centralizes consent by sharing cookie preferences across connected group websites. How When an anonymous visitor accepts a cookie on one domain and then visits another brand website where Cross-Domain Consent is enabled, they will not be asked about cookie preferences again and any future changes to a cookie preference will be automatically synced to connected brand domains. Why Improve the user experience and reduce consent fatigue by only asking website visitors to provide cookie preferences once across multiple brand domains. Reduce the number of repetitive consent requests – particularly powerful when privacy browsers delete third-party cookies and Cassie Identity Service

			Maximize efficiencies by only requiring one cookie banner across multiple domains for a centralized compliance solution and reduced operational setup time.
2022/23	Multi-sector	Contracts Awarded	Over the past 12 months, Cassie has successfully established partnerships with enterprise clients spanning various industries, notably the automotive and pharmaceutical sectors. This strategic expansion reflects our ability to diversify and provide tailored consent and preference solutions to meet the unique needs of each sector, positioning us as a versatile and trusted partner.
2023	Independent Research Reports	Independent Research Projects	Cassie has commissioned two research projects this year and written reports on its finding. B2C – Data Myths and Misconceptions Report This report explores consumers' views on data privacy & security, exploring factors that shape their behavior & decisions about protecting their data. B2B – Privacy Pain Points for Marketers Our research report uncovers how privacy pain points like compliance complexity and the end of third-party cookies will affect marketers.

Source: Press Release, Newsletters

14.11.7 Key Initiatives

Category	Description
Commissioned research reports	Producing and sharing research reports related to consent management, data privacy, and compliance positions Cassie as a thought leader in the field. We conduct both consumer and professional surveys to gain unique perspectives on the compliance landscape. We then share these reports with organizations to provide key insights into industry trends, benchmarks, and emerging regulations, shaping their understanding of the importance of consent management.
Partnerships	Cassie collaborates with other companies in the privacy and data protection ecosystem, such as legal firms, technology providers, management consulting firms and compliance experts, to evolve our product, expand our reach and offer comprehensive solutions to our clients.
Product enhancements	Establishing a reseller program allows other businesses to sell Cassie's consent management solutions as part of their offerings, which enables us to tap into new global (and region specific) markets and increase our sales channels.
Weekly privacy news round-up email newsletters	Cassie sends out weekly newsletters to its subscriber community containing updates on privacy regulations, compliance trends, and best practices in consent management. This initiative showcases our expertise to new target audiences and helps keep our existing and prospective customers informed about relevant developments.
Sector-specific global PR	Global Public Relations efforts help Cassie establish a strong presence in different industries and regions. By tailoring our PR efforts to specific sectors, we highlight how our consent and preference management solution address the unique needs and challenges of different industries.
New cookie products: Cross-Domain Consent and Anonymous Progressive Profiling	Cassie have enhanced our platform to support cross-domain consent for cookies to optimize the user experience and anonymous progressive profiling enables marketers to seamlessly capture first-party data and further enhance the accuracy of user profiles for personalized campaigns and powerful data insights.
Customer engagement	Cassie provide customers with comprehensive resources to get the most out of the Cassie platform, including release notes, a Developer HUB, and a Learning HUB. These regularly updated resources help customers stay informed about updates, integrate Cassie's solution more effectively, participate in training modules and make the most of the platform's capabilities.

Category	Description
Marketing campaigns	Cassie runs omnichannel marketing campaigns to promote our consent management solution. These campaigns include online advertisements, social media adverts, webinars, and content marketing focused on educating enterprise businesses about the importance of consent management and how Cassie's platform can help them.
Other relevant initiatives	Cassie also engages in initiatives such as hosting webinars or workshops for both our existing customers and a wider audience, participating in industry conferences and events, producing educational content (e.g., guides, whitepapers), and offering consultations to potential clients to showcase their expertise and solution capabilities.

Source: Press Release, Newsletters

15. Appendix

The Insight Partners is a one stop industry research provider of actionable intelligence. We help our clients in getting Solutions to their research requirements through our syndicated and consulting research services. We are a specialist in Deployment, Media, Automotive, Healthcare, Manufacturing, Aerospace & Defense and Telecommunication industries.

We are committed to providing highest quality research and consulting services to our customers. We help our clients understand key market trends, identify opportunities, and make informed decisions by providing market research Solutions at an affordable cost.

Our syndicated research content is focused towards providing global and regional market forecasts and analysis. All our syndicated reports provide analysis of key trends, market size and shares, and competitive landscape analysis. We provide detailed segmentation of market by geography, Deployment, product or service which helps our clients get a deeper market analysis.

We understand syndicated reports may not meet precise research requirements of all our clients. We offer our clients multiple ways to customize research as per their specific needs and budget:

	Incorporated in	2015	➤ We offer our clients an opportunity to customize our off the shelf syndicated reports at no additional cost. This provides our clients with precise intelligence they require in turn saving them thousands of dollars in commissioning large consulting studies.
	Employee strength	250+	➤ We offer rapid research services through which clients can get quick analysis on company, industry, or topic of their choice as per pre-defined report structure. This offers clients access to information they need at a low cost for standardized but information specific for their needs.
	Clientele Clients Across Industry Verticals	500+	➤ Through our consulting services offerings, we offer clients 100% customized solutions for their research needs that are not covered by our syndicated report offering or on-demand research. Clients get a fully customized research solution provided by industry experts and backed by transparent research methodologies

We provide best in class customer service and our customer support team is always available to help you on your research queries. We also offer enterprise subscriptions which provide significant cost savings to our clients.

15.1 Word Index

Table 120. List of Abbreviation

Abbreviation	Expansion
APAC	Asia Pacific
BFSI	Banking, Financial Services and Insurance
CAGR	Compound Annual Growth Rate
CAD	Computer-Aided Design
CCAP	California Consumer Privacy Act
CMP	Consent Management Platform
EU	European Union
GDP	Gross Domestic Product
GDPR	General Data Protection Regulation
International Energy Agency	IEA
IT	Information Technology
MEA	Middle East & Africa
Mn	Million
PEST	Political, Economic, Social, and Technological
R&D	Research & Development
SAM	South America
SWOT	Strengths, Weaknesses, Opportunities, and Threats
UAE	United Arab Emirates
UK	United Kingdom
US	United Components
US\$	US Dollar
United Nation Conference On Trade And Development	UNCTD

Source: The Insight Partners Analysis

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