

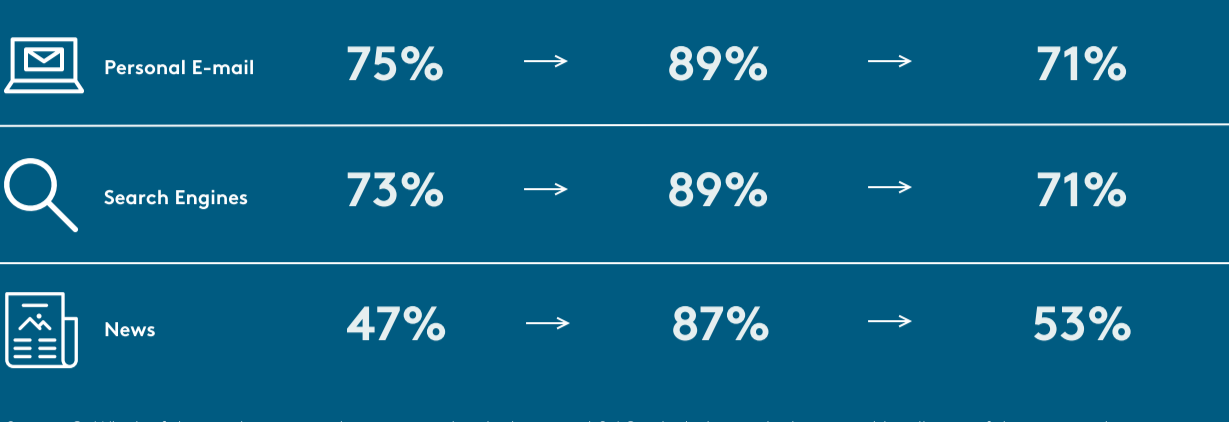
# OPTIMISATION OVER REFORM

Exploring the EU Consumer experience of an ad funded internet

IAB Europe commissioned Kantar Media to produce a comprehensive study of EU consumers' understanding of their digital privacy rights and related online experience. The study included quantitative surveys in 12 EU countries as well as qualitative groups in 3 of these locations.

## VALUE

Ad-subsidised online services are essential to the lives of consumer

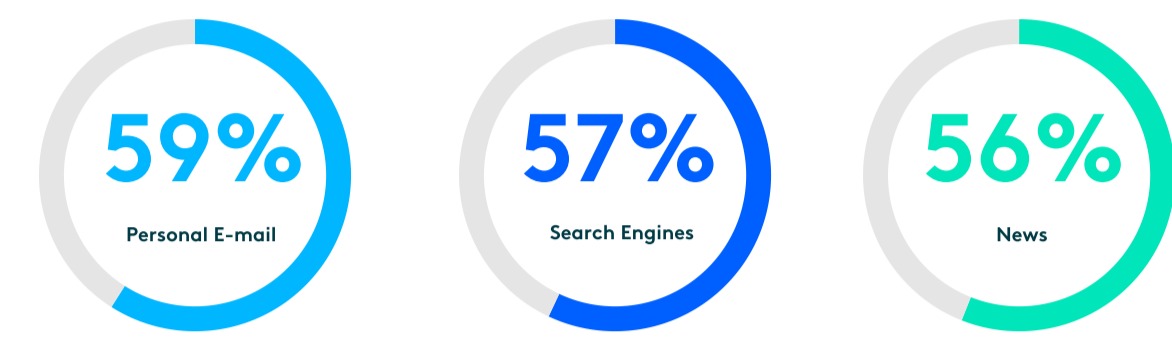


Source: Q. Which of these online services have you used in the last month? / Q. which do you think you would really miss if they were no longer available to you?

Base: All EU consumers: 10,500, Service Users: minimum across 4 categories 6,077 – maximum 7,832, Free service users: minimum across 4 categories 5,391 – maximum 6,983

Losing advertising funded access to digital services is seen as damaging to our society

% who see losing access as harmful to society



Source: Q. If removing personalised advertising meant that these services were no longer available free, so users would need to pay for them, what, if any, impact do you think it would have on people's lives and our society? Base: Users of services - minimum 6,077 – maximum 7,832.

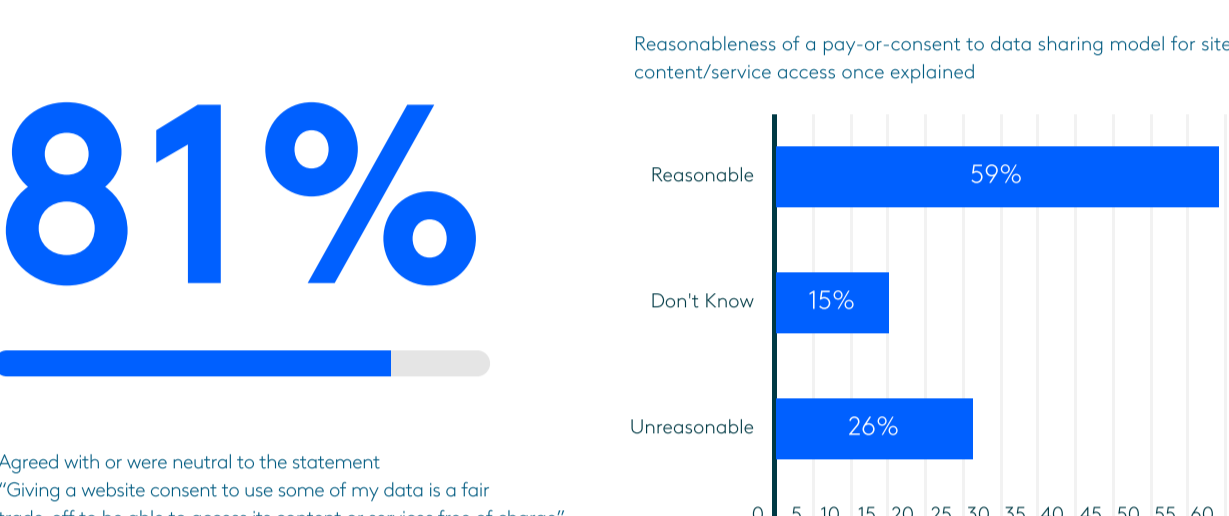
Imagine having to pay just to read the news or send an email. That would leave so many people behind

- France, Female, 35-54

The internet is, in practice, a public service. We shouldn't have to pay just to access essential things

- France, Male, 55+

Consumers see providing data access consent as a fair exchange for digital services



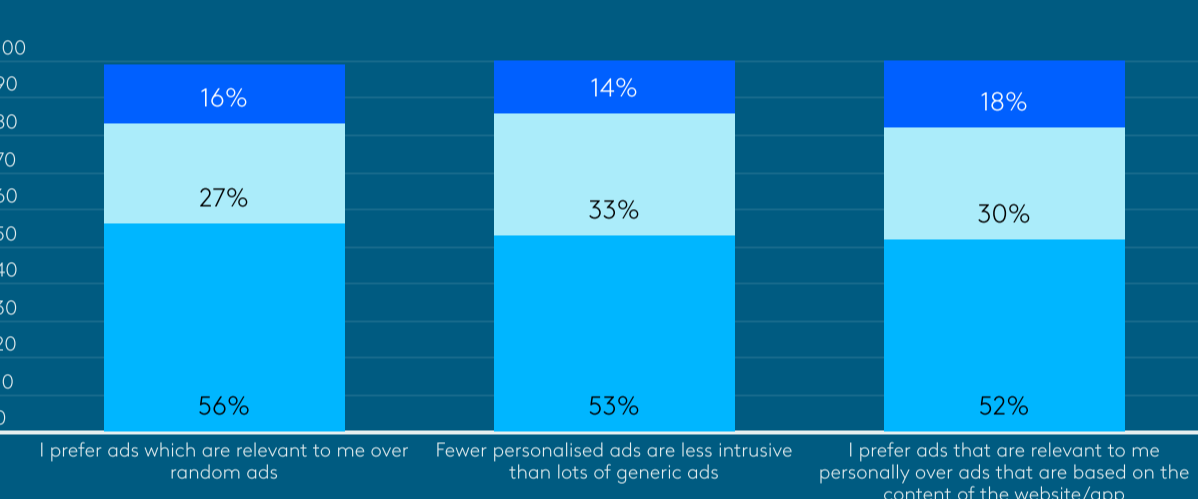
Agreed with or were neutral to the statement "Giving a website consent to use some of my data is a fair trade-off to be able to access its content or services free of charge"

Source: Q. Please tell us to what extent you agree or disagree with the following statements about digital advertising... Giving a website consent to use some of my data is a fair trade-off to be able to access its content or services free of charge / Q. Given what you now know about advertising personalisation and the degree to which some sites and apps are particularly dependent on revenue from this type of advertising, how reasonable do you think it is for companies to use this type of pay or consent model?

Bases: All EU Consumers 10,500

## RESONATE

Personalised ads are a better way to connect with consumers



Source: Q. Please tell us to what extent you agree or disagree with the following statements about digital advertising.

Base: All EU Consumers 10,500

A personalised ad can be very helpful when it reminds me of something I really wanted.

- Poland, Male, 35-54

## EMPOWER

EU consumers have a functional understanding of digital privacy

I can name GDPR and even the Personal Data Protection Act in Poland, but I still don't know all the details.

- Poland, Male, 35-54

In a true or false quiz about personalised advertising...

EU consumers were most likely to get these statements right

- If I agree, companies may use my past shopping to recommend further products (TRUE)
- If I agree, companies can use data such as location or device type to create personalised ads (TRUE)
- If I agree, companies can use device location to show geographically personalised ads (TRUE)

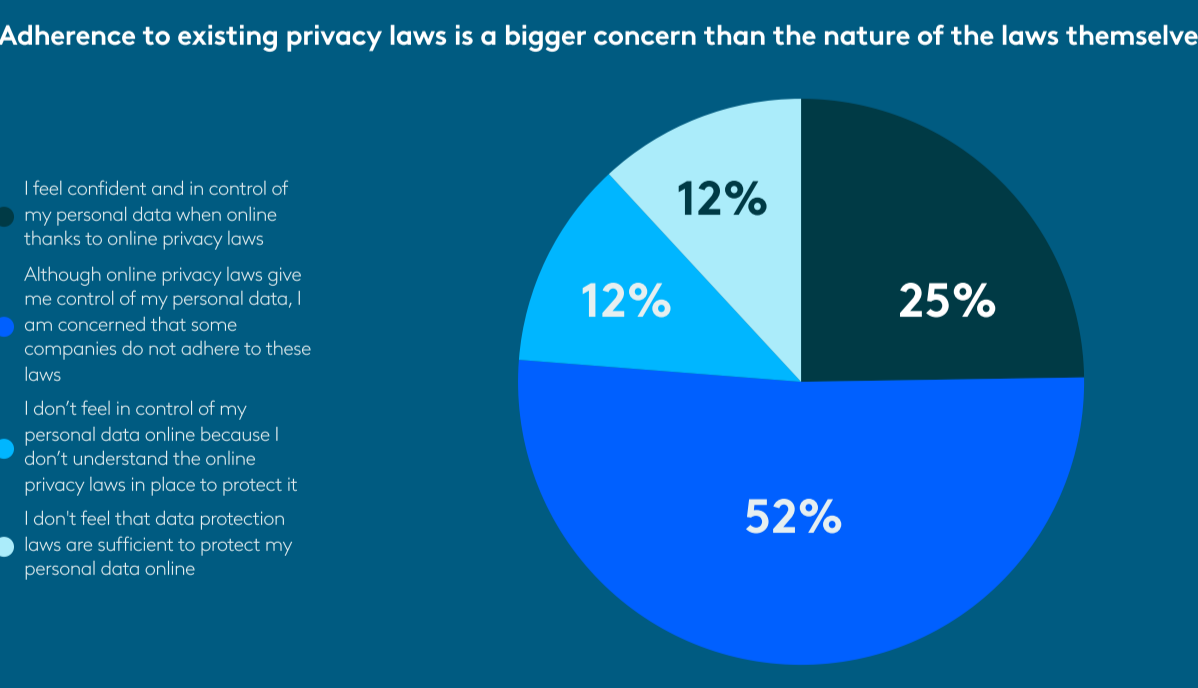
EU consumers were most likely to get these statements wrong

- Companies could face severe fines if they do not collect the relevant consent from me when collecting my data for marketing purposes via cookies (TRUE)
- Smartphones and smart devices actively listen to our conversations to show us personalised ads (FALSE)
- The consent banner will always be shown each time I visit a website even if I have agreed to accept collection of my personal data recently (FALSE)

Source: Q. This next section is a quiz game, based on personalised advertising, where the ads you are made more relevant to you. Some of the statements we make about a personalised advertising will be true and some false and we would like you to tell us which you do or do not believe."

Statements were shown in a random order for each respondent to avoid order bias. Base: All EU Consumers 10,500

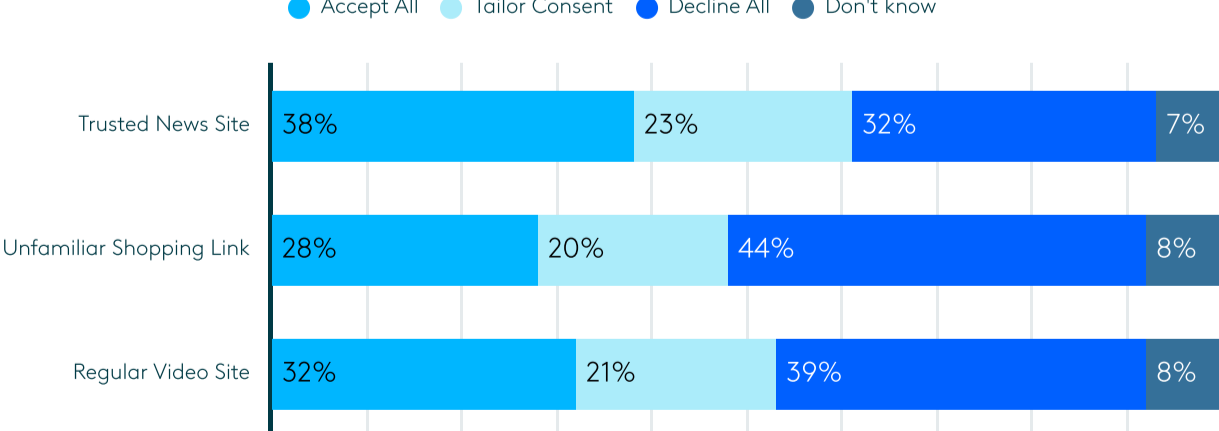
Adherence to existing privacy laws is a bigger concern than the nature of the laws themselves



Source: Q. Which of the following 4 statements do you think most closely matches how you feel about online privacy laws and how they protect your personal data?

Base: All EU Consumers -10,500

Consumers are adjusting their actions at consent banners based on the context



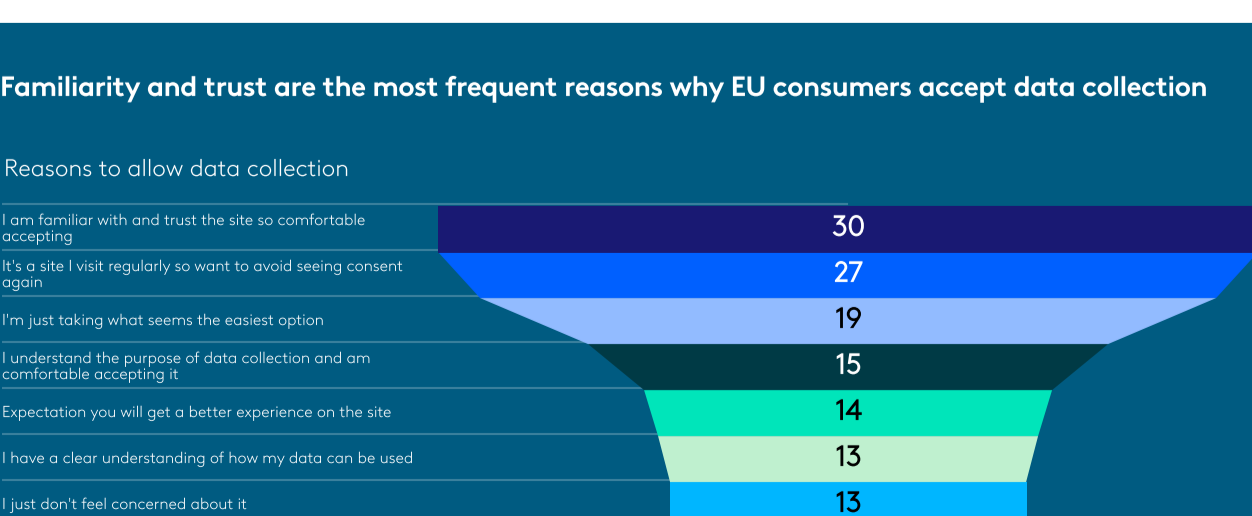
Source: Q. Imagine that you're reading a news site you visit regularly and trust. That banner pops up asking for permission to collect your data to personalise content and/or advertising. How would you respond in this scenario?

Q. You're shopping for sunglasses online and click on a link to a sunglasses website you had not heard of before from a search engine. That banner pops up asking for permission to collect your data to personalise content and/or advertising

Q. Imagine you're on a site you use often to watch free videos online. That banner pops up asking for permission to collect your data to personalise content and/or advertising.

Base: For all scenarios - All EU Consumers 10,500

Familiarity and trust are the most frequent reasons why EU consumers accept data collection



Source: Q. On the occasions you visited a website or online service and decided to accept data collection, what would you say were the main reasons behind accepting?

Base: All EU consumers 10,500

Our research has led us to a clear set of key insights and policy recommendations, while highlighting the need to balance a wide variety of factors.

To find out more about our research, what we have learnt and crucially the conclusions we have come to please read our full report [here](#)