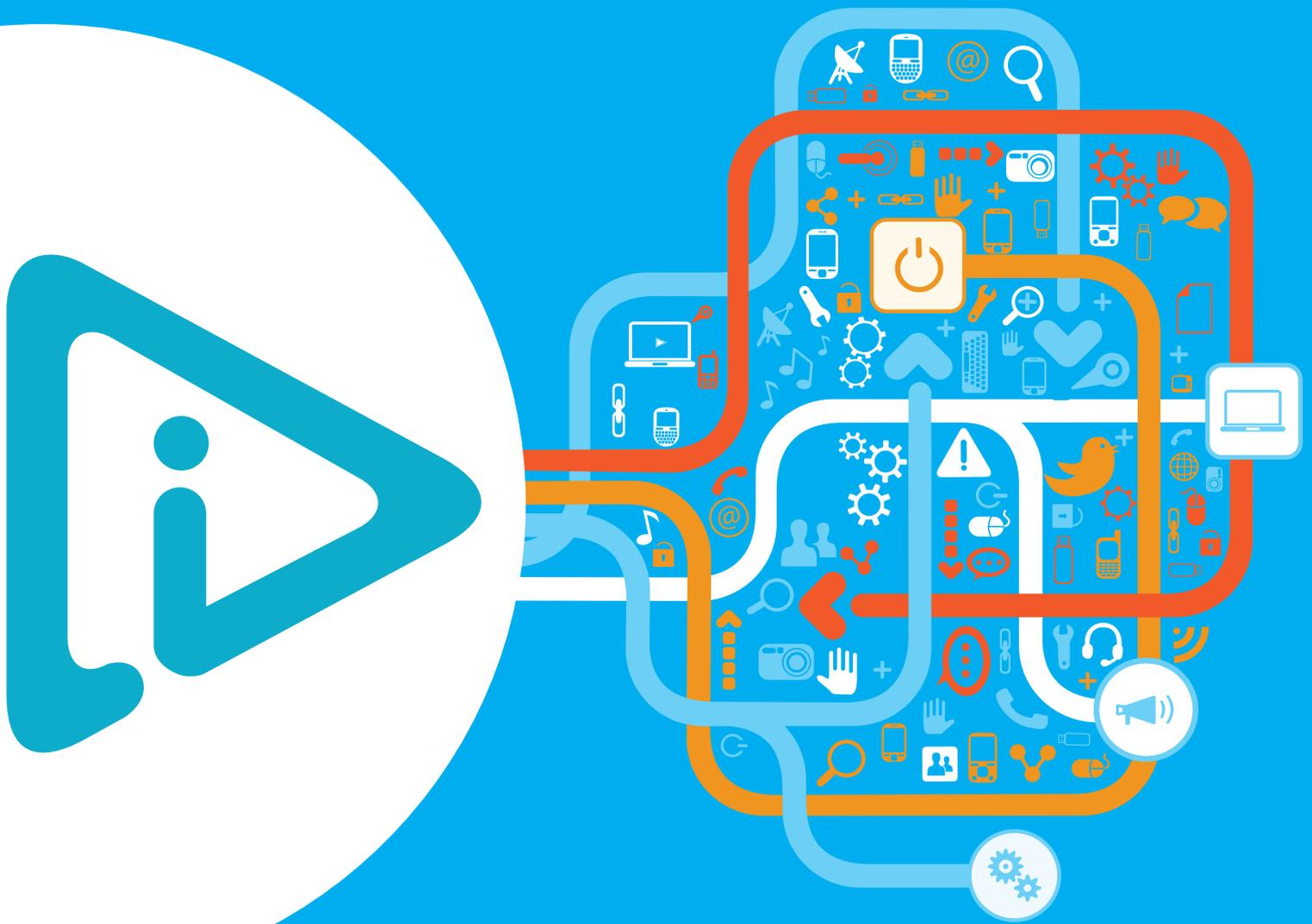


European Advertising Consumer Research Report 2021

Consumer Awareness & Impact of the European Self-Regulatory Programme for OBA





Conor Murray, Director of Regulatory and Public Affairs, egta
Chair of the EDAA Steering Group

“ We, at the EDAA, are delighted to see that the efforts carried out by the industry to raise awareness around the EDAA’s Self-Regulatory Programme and the options for learning and customisation that the YourOnlineChoices platform provides are paying off. In the four years since the previous similar study, awareness of the AdChoices Icon has increased substantially, whether accompanied by the AdMarker (and local translations) or not.

The positive impact that the Icon (and what it entails for end-users in terms of enhanced transparency) has on the acceptance of Online Behavioural Advertising (OBA) practices and respondents favourability towards the brand being advertised is significant. In fact, tailored advertising is not the only area that sees higher approval ratings by respondents in the context of the EDAA Programme. Websites, brands, and the digital advertising ecosystem as a whole are more likely to be trusted by respondents, when displaying the AdChoices Icon and linking through to the YourOnlineChoices.eu website. Engagement too is witnessing record levels since 2014, when the first research to gauge respondents’ attitudes was carried out. In six of the ten countries surveyed in 2020, around a half or more respondents who have previously seen the Icon have clicked on it.

Of course, despite these positive results, work still needs to be done to improve the understanding of the Programme and the tools made available to consumers, to take better informed control of their online advertising experience. It is welcoming to see that in 2020 EDAA partnered with MediaSmart in the UK to help address this - after all, consumer empowerment starts with trust.

All of the above call for continued efforts to support and promote this unique Self-Regulatory Programme administered by EDAA whose ultimate goal is to ensure a safe, responsible, open and trusted digital advertising ecosystem, with benefits for all stakeholders involved.

I would like to thank you for taking the time to read this fascinating research report and recognising these valuable tools and this one-of-a-kind self-regulatory Programme as a cornerstone in a journey where we all work and act together, in placing the consumer first.”



<u>1. EXECUTIVE SUMMARY OF RESEARCH FINDINGS</u>	4
<u>2. SURVEY METHODOLOGY</u>	5
<u>3. EDAA SELF-REGULATORY PROGRAMME BACKGROUND</u>	6
<u>4. DETAILED FINDINGS</u>	7
<u>4.1 Awareness of the AdChoices Icon</u>	7
<u>4.2 Engagement with the AdChoices Icon</u>	8
<u>4.3 Understanding of the AdChoices Icon</u>	9
<u>4.4 Impact of the European Self-Regulatory Programme</u>	10
<u>4.5 OBA Favourability</u>	13
<u>4.6 User Behaviour</u>	17
<u>4.7 Enhancing youronlinechoices.eu</u>	18
<u>5. CONCLUSIONS</u>	19
<u>Appendix for previous methodologies</u>	20



1. Executive Summary of Research Findings



The 2020 European Advertising Consumer Research Report captures a panoramic view of respondents' attitudes and awareness of the European Self-Regulatory Programme for Online Behavioural Advertising (OBA) in 10 different countries across Europe.

The study was conducted by Ipsos MORI on behalf of EDAA. Fieldwork ran from 30/11/2020 to 14/12/2020 with over 10,000 adults across 10 different European countries interviewed online.

Selected countries – Great Britain, Germany, France, Italy, Spain, Sweden, Poland, Belgium, Romania and Ireland – were chosen for their diversity both in geography and the implementation status of the European Self-Regulatory Programme. Tracking data is available for these markets for most questions, as they were also included in comparable research conducted in previous years. The online ecosystem relies on advertising and it is critical that more consumers understand the important role ads play in supporting the delivery of online content and services often at little to no cost to them. Concurrently, it is also important to inform consumers about mechanisms in place to manage their preferences for online behavioural advertising, such as the EDAA's Self-Regulatory Programme.

Results show that awareness of the AdChoices Icon continues to rise in 10 markets across Europe and nearly 50% who have previously seen the Icon are choosing to find out more. About half or more of the respondents who were aware of the Icon clicked on it in six of the ten countries surveyed: Poland, Sweden, Belgium, Romania, Germany, and Spain. The Programme can have a positive effect on attitudes too, with favourability towards Online Behavioural Advertising (OBA) rising in all countries surveyed when the Icon is displayed.

A summary of key findings is presented below:

- **Approval:** Based on their own experience of OBA, nearly half of respondents from Romania (48%), Spain (47%), and Poland (46%) are either "Strongly in favour of" or "Somewhat in favour of" OBA. At the opposite spectrum, respondents in Germany, France, and Ireland are more circumspect, with 27%, 27%, and 26% of respondents, respectively, either "Strongly in favour of" or "Somewhat in favour of" OBA.

However, nearly in all surveyed markets, respondents demonstrated potential for increase in favourability about the concept of OBA through the Self-Regulatory Programme, particularly in markets where respondents may otherwise be less inclined to favour OBA. In Great Britain and Ireland, for example, where 29% and 26% of respondents respectively show a favourable attitude towards OBA, having the AdChoices Icon on a particular ad significantly boosts favourability of OBA by a further 18 and 22 percentage points, respectively.

- **Brand, website, and transparency trust:** The research shows the presence of the AdChoices Icon can positively impact on the levels of trust in the brands advertised, the websites that feature the ad and the overall transparency in the digital advertising industry. In eight in ten of the markets, there has been a double digit percentage point increase in the proportion claiming to trust the brand being advertised more when the AdChoices Icon is present in comparison with the 2016 survey. The proportion of those claiming to trust the brand advertised more is highest in Italy (56%), Romania (48%), and Spain (46%).
- **Awareness:** Respondents' awareness of the AdChoices Icon with the AdMarker is highest in Ireland (51%) and Great Britain (50%). This marks a striking uptick from the 2016 values, when 39% and 34% of respondents, respectively, recognised the AdChoices Icon. Across nearly all countries surveyed awareness of the AdChoices Icon is greater when accompanied by the AdMarker "AdChoices" (and local translations), yet a clear upward trend in awareness is shown both with and without the accompanying text.
- **Understanding:** Understanding what the Icon means must be a focus in the near future, as "Click to manage your privacy preferences" was the most frequently selected option in 6 out of the 10 markets. The gap between the erroneous and the correct option in these countries, however, is minute and consistent. This data signals what consumers may expect before interacting with the AdChoices Icon, a helpful indicator to inform subsequent development work on further enhancing transparency and creating an increasingly positive user experience.
- **Engagement:** Another area which has seen vastly improved results is engagement. In six of the ten countries surveyed, around half or more of the respondents who were aware of the Icon have clicked on it. This is a marked positive evolution from the 2016 responses. The countries with the highest engagement rates are Sweden (56%), Belgium (53%), and Romania (52%).
- **Ad-blockers:** The use of ad-blockers remains relatively popular, ranging from around one quarter using them "frequently" or "sometimes" in four countries (France, Romania, Sweden, and Ireland) to the highest reported level of 35% in Poland in this respect.
- **Complaints:** As far as the likelihood of respondents to file a complaint about any company's OBA practices, the most determined markets to make a complaint are Italy (55%) and Spain (45%). However, a noticeable proportion of respondents (e.g. 26% in Sweden, 24% in Great Britain, and 23% in Ireland) do not personally know where to make a complaint about their OBA choices not being respected. This particular aspect calls for further awareness-raising.

2. Survey Methodology



The below methodology covers field work carried out in 2020. Methodology for previous years referenced in this report are contained in the [Appendix](#).

Sampling

On behalf of European Interactive Digital Advertising Alliance (EDAA), interviews were carried out on Ipsos MORI's online i:Omnibus service from 30/11/2020 to 14/12/2020, using a quota sample of adults who are members of Ipsos' European Online Panel. For each country, quotas were set according to age, gender and region. The number and ages of adults interviewed for each country were as follows:

Country	Age range	2020 Unweighted sample size
Great Britain	Adults 16-75	1024
Germany	Adults 16-70	1004
France	Adults 16-75	1034
Italy	Adults 16-70	1017
Spain	Adults 16-65	1022
Sweden	Adults 16-65	1021
Poland	Adults 16-60	1066
Belgium	Adults 16-70	1025
Romania	Adults 16-60	1035
Ireland	Adults 16-65	1002
Total		10250

Weighting

Within each country data was weighted by age within gender, region and working status to the known offline population profile for that country. For some countries, additional weighting criteria were included.

As well as providing the results individually for each of the ten countries included in the survey, we have produced an overall total based on "country averages". This is where the results from each country have the same weight rather than the true population proportions across the ten countries.

Data Quality

To ensure a quality sample, rules are in place to limit the number of surveys provided to each participant, which helps reduce the bias of multiple surveys. Procedures are also in place to remove panellists who are inactive or whose behaviour history is suspicious. During the survey data quality is ensured by flagging and removing participants' answers that are suspicious by validating geo-IPs and identifying any speeders or straight liners.

The work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252:2006, as well as ISO 9001:2008, the international general company standard with a focus on continual improvement through quality management systems and ISO 27001:2008, the international standard for information security. Further, Ipsos MORI is required to comply with the (EU) 2016/679 General Data Protection Regulation (GDPR) & the UK Data Protection Act 2018 (DPA), which covers the processing of personal data and the protection of privacy.

Questionnaires available on demand. Methodology has been kept consistent with previous years and can be consulted in the [Appendix](#).



3. EDAA Self-Regulatory Programme Background



Internet users [want](#) control over their privacy online. However, they also acknowledge the important role that digital advertising has to play in making content and services available, often at little to no cost. The European Industry Self-Regulatory Framework for Data-Driven Advertising seeks to strike that balance by empowering consumers with greater contextual transparency, choice and control.

At the heart of the EDAA Programme is an interactive pan-European Icon to serve as a transparency vehicle for ads that are delivered to internet users via data-driven practices, and specifically through Online Behavioural Advertising (OBA).

This Icon is a consumer-facing, interactive symbol that links consumers to mechanisms for users to control preferences, including an online portal, www.youronlinechoices.eu, where they can find easy-to-understand information on the practice of OBA (or data-driven advertising) as well as a mechanism for exercising informed choice – if they so wish, consumers may turn off OBA for some or all participating companies.



The European Interactive Digital Advertising Alliance (EDAA) is the organisation responsible for administering the European Self-Regulatory Programme for OBA across Europe and licensing the use of the AdChoices Icon and preference management platform.

Third Party participants that demonstrate full compliance with the Programme are granted the EDAA Trust Seal from one of a number of approved independent certification providers.

The Programme is enforced by the relevant advertising Self-Regulatory Organisation (SRO) in each country (e.g. the ASA in the UK, DDOW in Germany, Autocontrol in Spain, etc.). If businesses are not compliant then the enforcement sanctions could involve remedial action; a formal investigation, leading to the adjudication being published or bringing a company's continued non-compliance to the attention of a third party's potential clients and partners. Further sanctions include removal of the Trust Seal and withdrawal of the AdChoices Icon. For non-cooperative, serious, persistent and/or deliberate offenders, the SRO may also refer the company to the competent national Data Protection Authority (e.g. the Information Commissioner's Office (ICO) in the UK).

Media Smart Project

In 2020, EDAA in collaboration with Media Smart UK developed a [brand-new resource](#) designed to help young people understand the world of online advertising, and how they can get the best experience from it.

The new resource, 'How to manage your online advert experience', features a three-minute animated film which can be viewed here, as well as classroom resources, to support student discussions around what is OBA, why it exists and how young people can best manage it. It also explains how this type of advertising funds many of the platforms that young people use every day, from apps and websites, to search engines. The new resource aims to help young people understand how to manage the advertising they see through introducing them to the 'AdChoices Icon', and how they can click on the logo to learn more – and to manage the adverts that are served – through tools including the EDAA's www.youronlinechoices.eu website.

The resource also includes a number of classroom activities, games and quizzes to raise awareness of these issues and support the wider PSHE curriculum (Personal, Social, Health and Economic education) with media literacy and digital resilience. It builds on the PSHE programme of study on how data can be used to influence decisions, including tailored advertising and other forms of personalisation online.

Reception and Analytics

The educational resource was launched in the UK in October 2020, followed by a month-long dedicated social media campaign both by EDAA and MediaSmart. Since then it has garnered impressive, national level attention from schools. The resource was also the focus of a webinar, hosted on 4 November 2020 by Media Smart Chair and CEO of Omnicom Media Group UK, Dan Clays. Speakers included Angela Mills Wade, Chair of EDAA, and Will Gardner OBE, CEO of Childnet.

The resource pack has already been downloaded 250 times (as of January 2021) and the website has seen an ever-increasing number of registrations, topping the 300 mark in the months of December and January alone, with most of them being teachers. The uptake of the resource has been so encouraging that EDAA is now laying the groundwork to roll out the resource in several other European markets.

4. Detailed Findings



The European Advertising Consumer Research Report 2021 was commissioned by EDAA in order to assess the ongoing progress of the European Self-Regulatory Programme for OBA against clear benchmark results from previous studies.

Questions were developed with the intent of measuring participants' attitudes and perceptions of the European Self-Regulatory Programme, now in its fourth iteration (previous surveys took place in 2014, 2015 & 2016). Additionally, the research sought to determine the current levels of awareness and understanding of the AdChoices Icon. The time window between reports has been used to develop new assets, projects and initiatives and leverage them to address the findings of the previous reports. As shown in the charts, graphs and subsequent sections below, this has been a resounding success in most respects. Furthermore, the survey has been expanded and augmented for 2020 to include additional questions to address new regulatory and market developments, as well as new areas of interest.

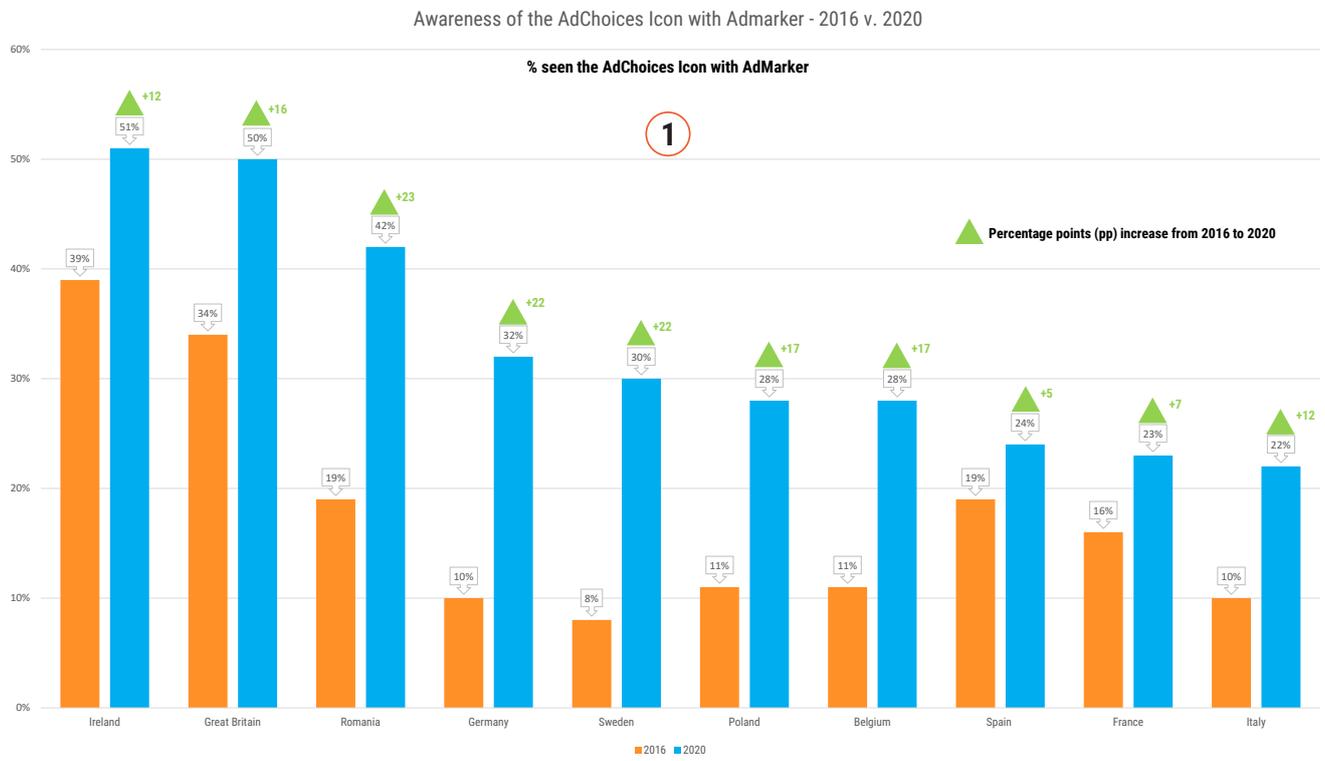
4.1 Awareness of the AdChoices Icon

Survey respondents were asked whether they had seen either the AdChoices Icon (with or without the AdMarker text) at any time before the survey. The UK version of the Icon and text are shown below, although the standard localised versions were shown in the language of the ten different European markets where the research was conducted. Respondents were shown one image at a time and the order of the two options was rotated within the questionnaire to limit the impact of the order effect. The data used is for all respondents whether they have seen each image in first or second position.



Awareness with AdMarker

The chart below shows the percentage of participants who are aware of the AdChoices Icon when displayed alongside the AdMarker. The results show large gains in awareness since the previous survey iteration in 2016, with all but two markets showing double-digit percentage point growth. Ireland (51%) and GB (50%) displayed the highest awareness of all markets, and boast solid growth compared to 2016, up 12 and 16 percentage points respectively. While awareness of the AdChoices Icon with the AdMarker is lowest in Italy (22%) and France (23%), these markets still show improvement. The highest percentage points increase was recorded in Romania (up 23 percentage points), and Germany and Sweden (both up 22 percentage points).



Q1_1. Before today, have you seen the following icons or symbols online?

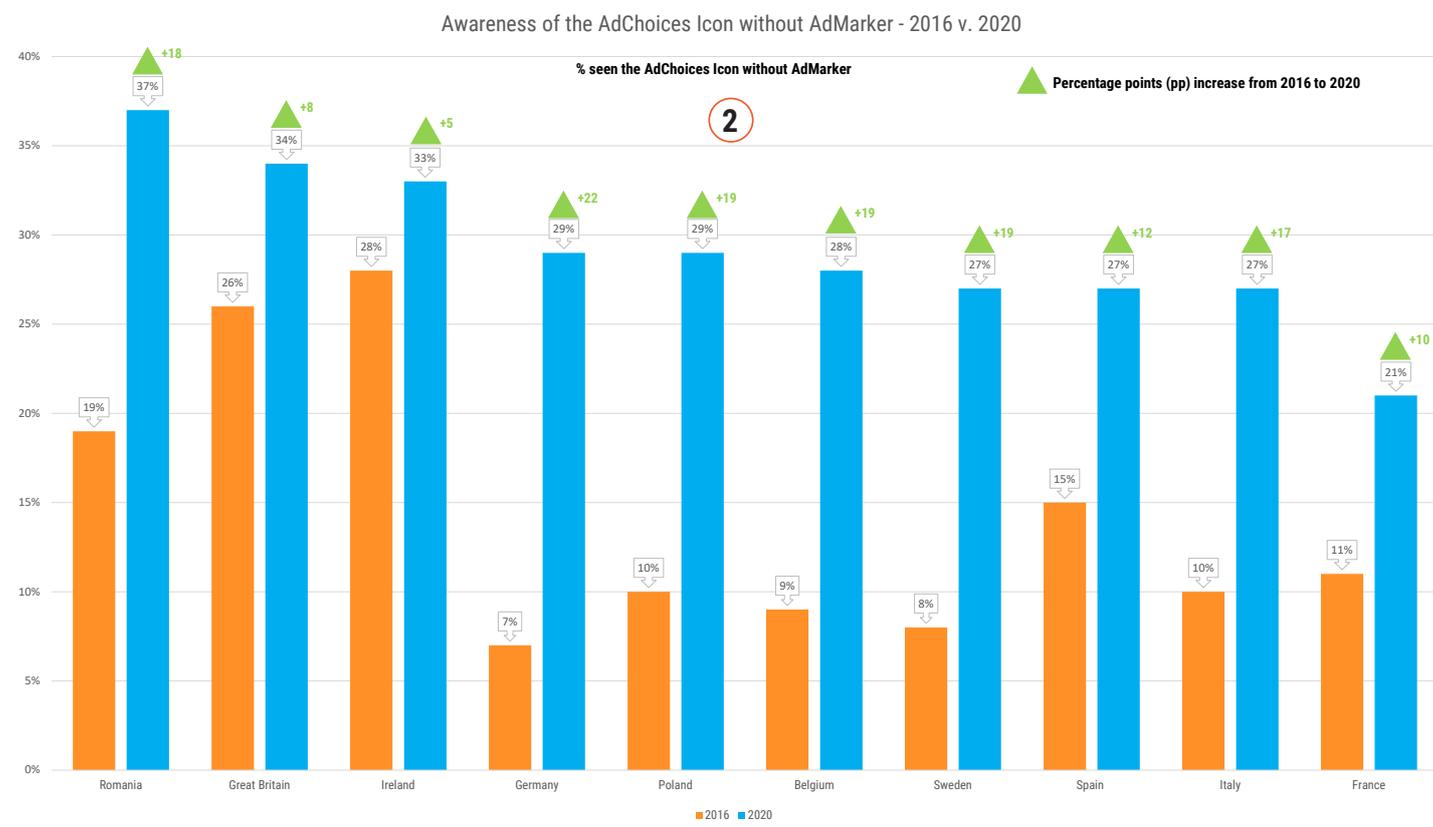
Base: Adults (16 - 60/75) c.1000 respondents per market. Online interviews. Fieldwork dates and base sizes in EDAA Research methodology section.

This trend of continued improvement in terms of awareness, evident in the 2015 version of the study and then in all subsequent iterations, shows that there is still room for growth. Furthermore, these results were recorded --for the first time-- without an awareness campaign being rolled out ahead of the survey, but with consistent and sustained work on the development of the EDAA Programme. Combined with additional research conducted in 2019 on consumer attitudes and awareness of GDPR (see [here](#)), this shows that efforts should be multi-pronged and address a variety of groups and demographics through a diverse range of means. A noteworthy recent example is EDAA's education project with Media Smart UK, presented in [Section 3](#).

Great Britain is the only country for which longer-term comparison data exists: here awareness of the Icon with the AdMarker continues to rise: 13% in 2012, 22% in 2013, 26% in 2014, 28% in 2015, 34% in 2016 to reach 50% in 2020.

Awareness without AdMarker

The chart below shows the percentage of respondents who were aware of the AdChoices Icon when displayed in the absence of the AdMarker. As previously indicated, for nearly all respondents the awareness of the AdChoices Icon is greater when accompanied by the AdMarker text (e.g. "AdChoices" in English). The constant, however, is the remarkable evolution since the previous iteration of this study. As was the case for awareness of the AdChoices Icon with the AdMarker, even in the absence of the AdMarker text, awareness has increased by double digits percentage points in all but two markets. The most noteworthy hikes were recorded in Germany (up 22 percentage points), and Poland, Belgium, and Sweden (each up by 19 percentage points).



Q1_2. Before today, have you seen the following icons or symbols online?

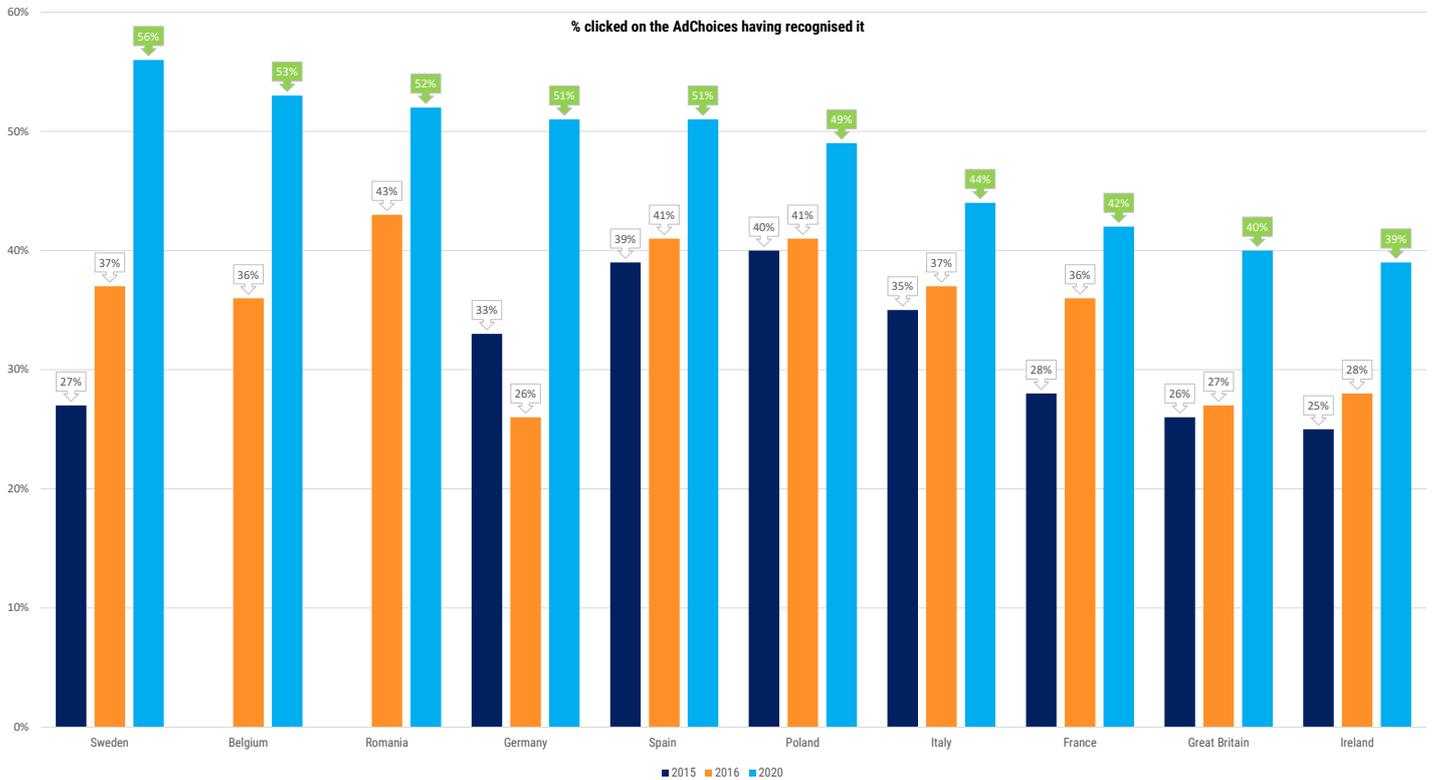
Base: Adults (16 - 60/75) c.1000 respondents per market. Online interviews. Fieldwork dates and base sizes in EDAA Research methodology section.

4.2 Engagement with the AdChoices Icon

Respondents aware of the AdChoices Icon were then asked if they had ever clicked on it. Growth was recorded in all surveyed markets, with no exception, with numbers ranging from +25 percentage points in Germany (51% in 2020 vs. 26% in 2016) to +6 percentage points recorded in France (42% in 2020 vs. 36% in 2016). In six of the ten countries surveyed (Poland, Sweden, Belgium, Romania, Germany, and Spain) about half or more of the respondents who were aware of the Icon have clicked on it.

The 2015 vs. 2016 comparison in terms of engagement showed that getting users to interact with the AdChoices Icon was a challenge. In fact, for most countries surveyed at the time, the difference between the two iterations, while on a positive overall trend, was much smaller than the latest jump. Germany actually experienced a decrease in the level of engagement in 2016 compared to 2015. What is evident in the 2020 results is that not only has this impasse been resolved, but in most cases the results are spectacular. Germany has nearly doubled engagement rates. Engagement in Great Britain has spiked to 40%, after previous iterations of this survey showed this metric at 26% and 27% in 2015 and 2016 respectively.

Engagement with the AdChoices Icon - 2015 v. 2016 v. 2020



Q3. Have you ever clicked on the AdChoices Icon?

2020 Base: All respondents who are aware of AdChoices icon c. 200 to 500 respondents per market. Online interviews. Fieldwork dates and base sizes for in EDAA Research methodology section. Methodology for previous years available in Appendix

4.3 Understanding of the AdChoices Icon

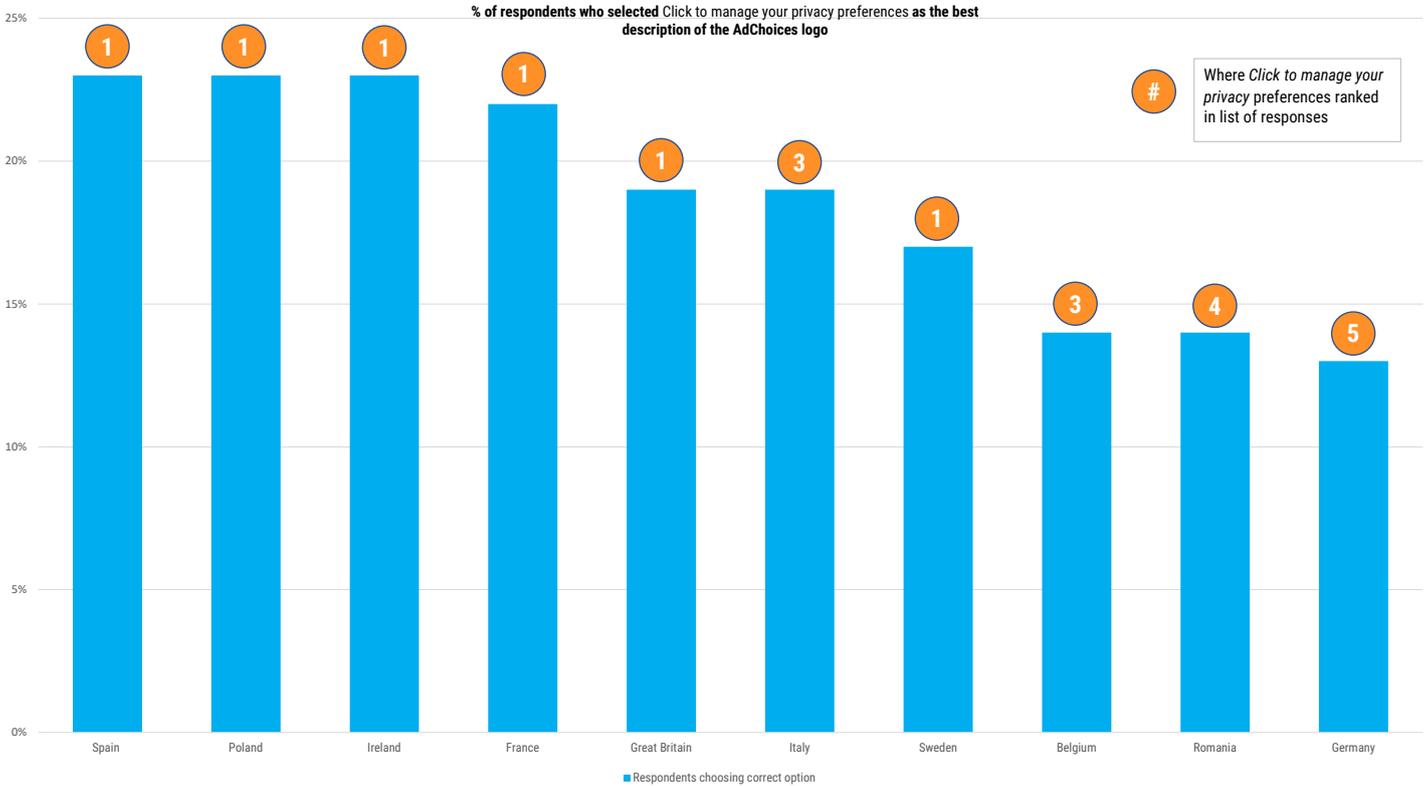
Respondents who had previously seen the AdChoices Icon were shown a sample advert and asked which, if any, of the following responses, from 1 to 6, they thought best described what the Icon means. Respondents also had the option to opt for an “other” response.

1. The logo of the brand being advertised
2. Click to see a video
3. Click to manage your privacy preferences
4. This is a safe advert
5. Click to visit the brand’s website
6. Click to exit the ad
7. Other
8. Don’t know



In the majority of surveyed markets (six out of the ten) “Click to manage your privacy preferences” was the most frequently selected top pick.

Understanding of the AdChoices Icon



Q2. What do you think BEST describes what the AdChoices Icon means?

Base: All respondents who are aware of AdChoices icon c. 200 to 500 respondents per market. Online interviews. Fieldwork dates and base sizes for in EDAA Research methodology section. Methodology for previous years available in Appendix

Steps have been made to improve the understanding of the AdChoices Icon. The results of the survey showcase a clear improvement with an increase in the proportion of respondents picking the correct response (i.e. "Click to manage your privacy preferences"). In 2016, in only a third of the surveyed markets was "click to manage your privacy preferences" the most frequently selected option, whereas in 2020 this was the case in 60% of the markets. In Poland and Ireland, where the correct answer was ranked second in 2016, results have improved and the "manage your privacy preferences" option is now the most frequently chosen answer. Nevertheless there is a clear need for improving understanding in several markets, notably Romania and Germany.

4.4 Impact of the European Self-Regulatory Programme

EDAA, on behalf of the online advertising industry and with the support of its cross-industry governing associations, has made significant efforts in recent years to address the concerns of all stakeholders in the online advertising ecosystem, to increase transparency and improve online business practices to bring responsibility, openness and increased trust to the value exchange between companies and consumers.

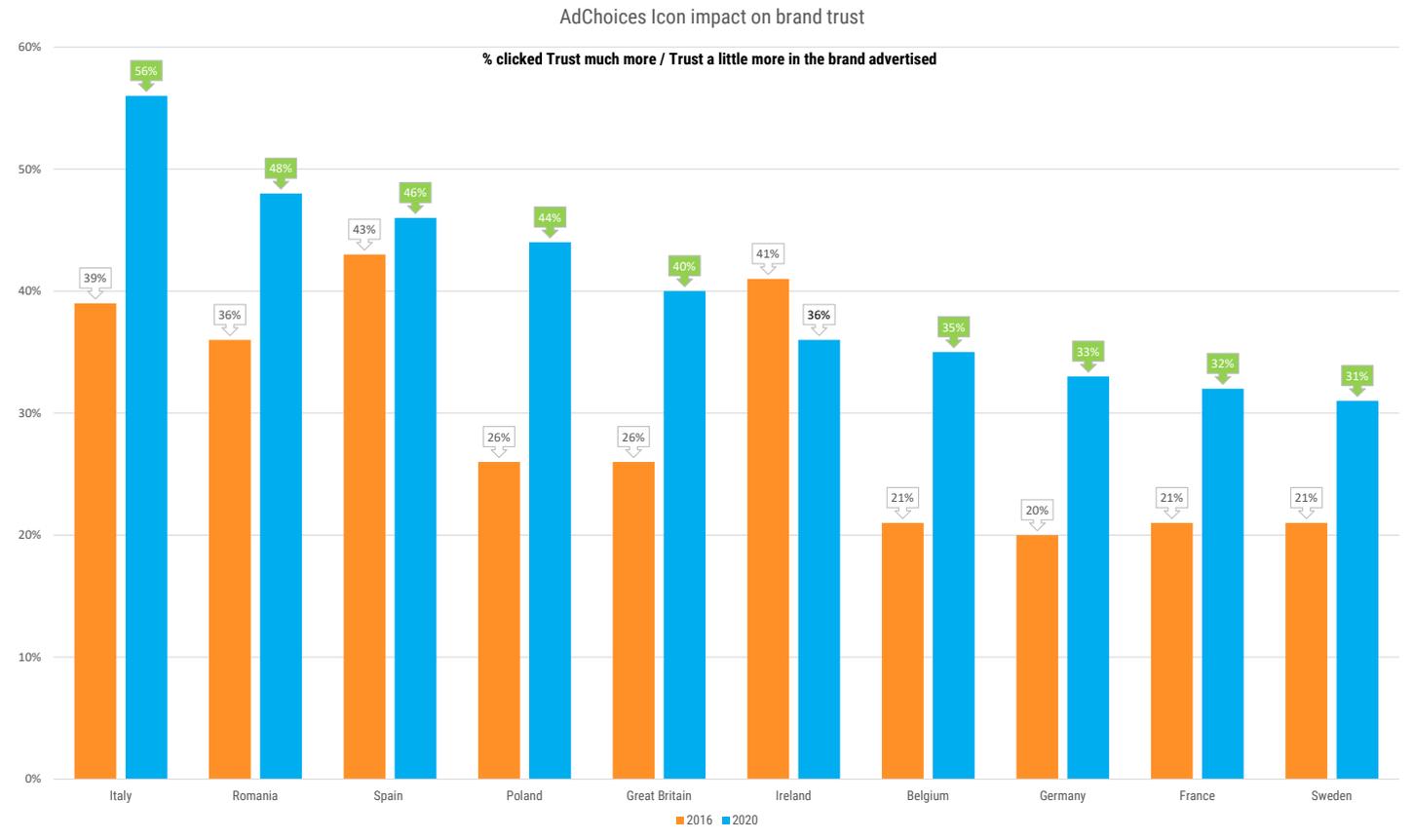
To close the circle for consumers, companies involved in the collection and use of data for OBA purposes are invited to integrate onto the "Consumer Choice Platform" at www.youronlinechoices.eu (YOC). End-users are thus provided with the option to turn off (or turn back on) tailored advertising by some or all participating companies. This consumer preference platform is a core component of the European Self-Regulatory Programme.

To gauge the impact of the European Self-Regulatory Programme, survey respondents were presented with an image of the YOC website homepage alongside an explanation that this is where they can find information about Online Behavioural Advertising (OBA), manage their online privacy preferences, and make a complaint about a company's use of OBA to their national Self-Regulatory Organisation.



Impact on brands, websites, and ecosystem transparency

The practice of OBA itself is not the only area that benefits from an increase of favourability as a result of having YOC information available to internet users and having the option of managing online privacy preferences. Survey respondents were also asked about whether the Icon changes their level of trust in the brand advertised, websites that feature the ad, as well as in the overall transparency in the digital advertising industry.



Q5_2. Does the AdChoices Icon make you trust the brand advertised more, less or does it make no difference?

2020 Base: Adults (16 - 60/75) c.1000 respondents per market. Online interviews. Fieldwork dates and base sizes in EDAA Research methodology section.

Trust in the brand advertised saw a clear boost with the presence of the AdChoices Icon. This ranges from an uplift to 31% in favourable attitude in Sweden, to a considerable uplift to 56% in trust reported in Italy.

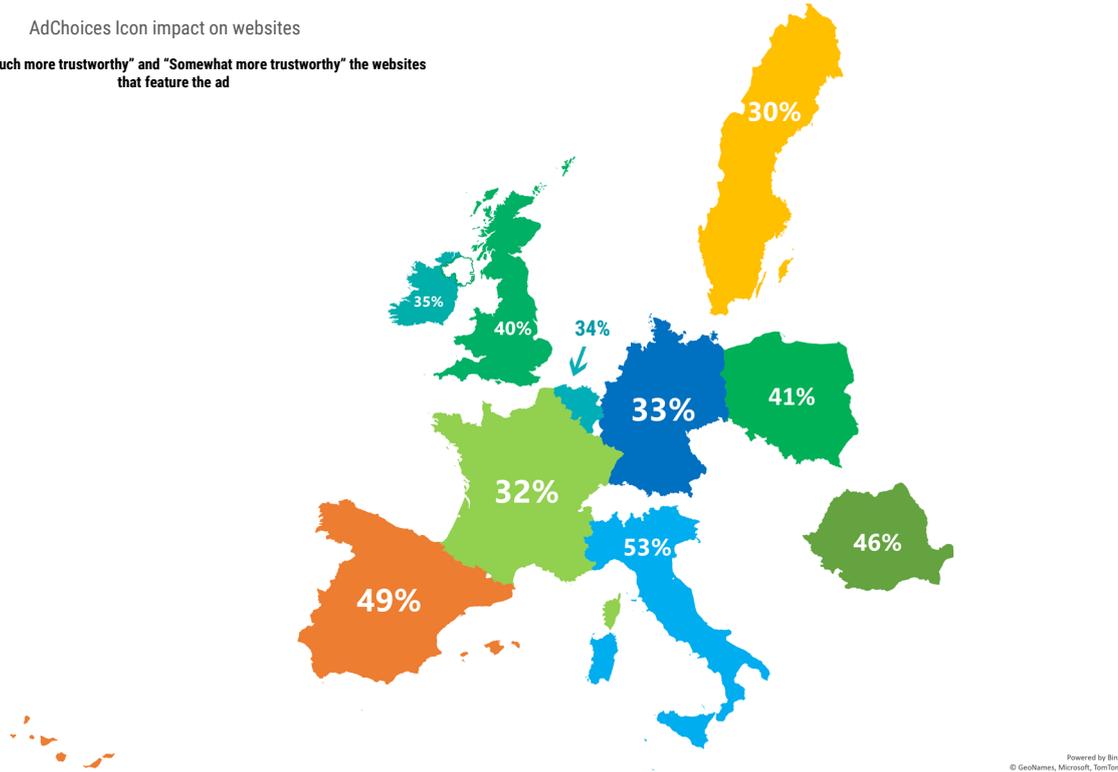
Respondents' perceptions regarding trust in the brand being advertised are up significantly from 2016 values, except for Ireland. In Italy, Romania, and Spain -- the top three markets in terms of positive impact of the AdChoices Icon on brand trust -- values from 2016 rose by 17, 12, and 3 percentage points, respectively. Poland, Great Britain and Belgium also saw favourability increase by 18, 14 and 14 percentage points respectively to brands bearing the Icon compared to 2016. Germany (33% in 2020 vs. 20% in 2016), France (32% in 2020 vs. 21% in 2016), and Sweden (31% in 2020 vs. 21% in 2016) follow this highly positive trend as well.



Trust in the brand advertised sees a clear boost with the presence of the AdChoices Icon.

The rise in trust towards websites that feature the ad and the overall transparency in the digital advertising industry, which the presence of the AdChoices Icon catalyses, is also noteworthy. More than half of respondents in Italy show an increased trust in websites that feature ads bearing the Icon. A similar proportion was recorded in Spain. Four or more in ten respondents in Romania, Poland, and Great Britain also trust the websites that feature the ad more which display the AdChoices Icon more.

AdChoices Icon impact on websites
% clicked "Much more trustworthy" and "Somewhat more trustworthy" the websites that feature the ad

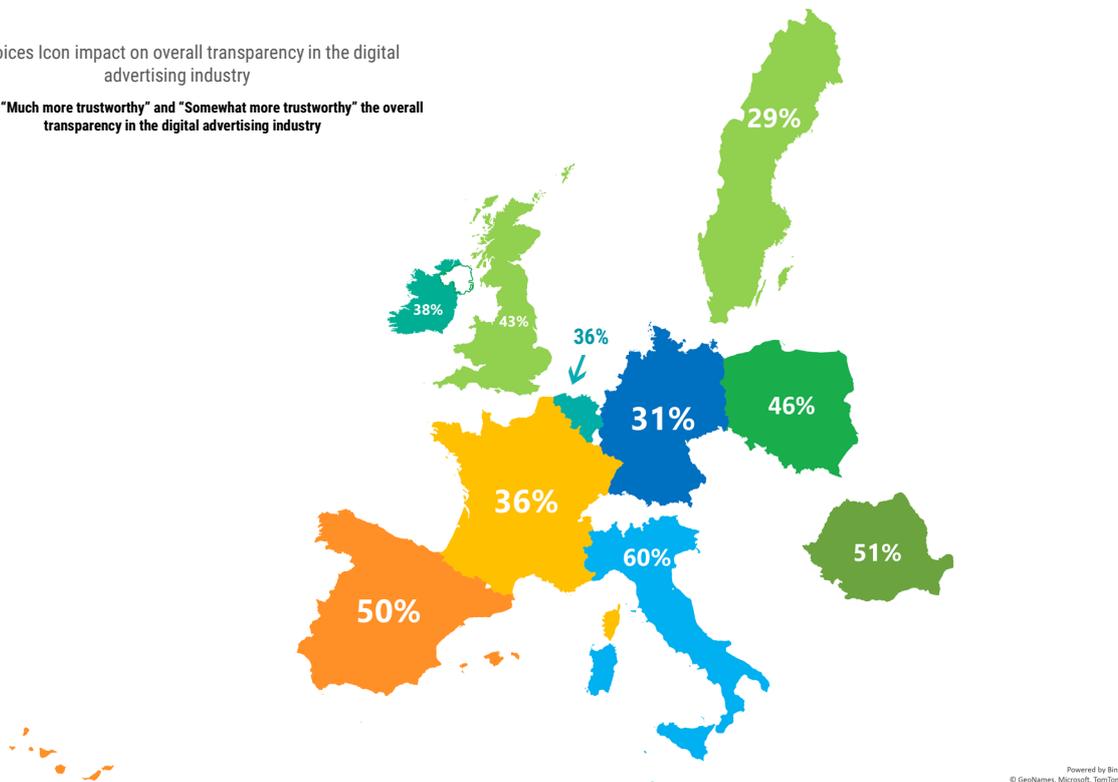


Q5_1. Does the AdChoices Icon make you trust the website that features the ad more, less or does it make no difference?

Base: Adults (16 - 60/75) c.1000 respondents per market. Online interviews. Fieldwork dates and base sizes in EDAA Research methodology section.

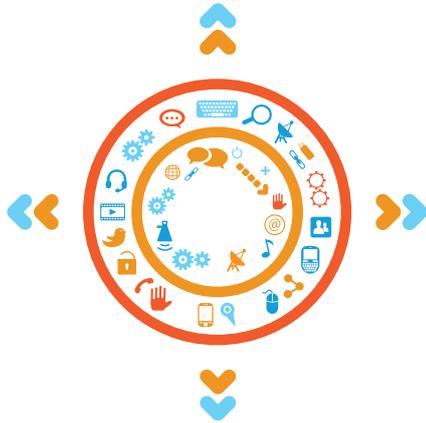
Overall, transparency in the digital advertising industry comes through as a clear benefit from the Icon and the Programme as a whole. The most significant impact on trust generated by the Icon was recorded in Italy (60% "much more trustworthy" or "somewhat more trustworthy"), followed by Romania (51%), and Spain (50%).

AdChoices Icon impact on overall transparency in the digital advertising industry
% clicked "Much more trustworthy" and "Somewhat more trustworthy" the overall transparency in the digital advertising industry



Q5_3. Does the AdChoices Icon make you trust the overall transparency in the digital advertising industry more, less or does it make no difference?

Base: Adults (16 - 60/75) c.1000 respondents per market. Online interviews. Fieldwork dates and base sizes in EDAA Research methodology section.

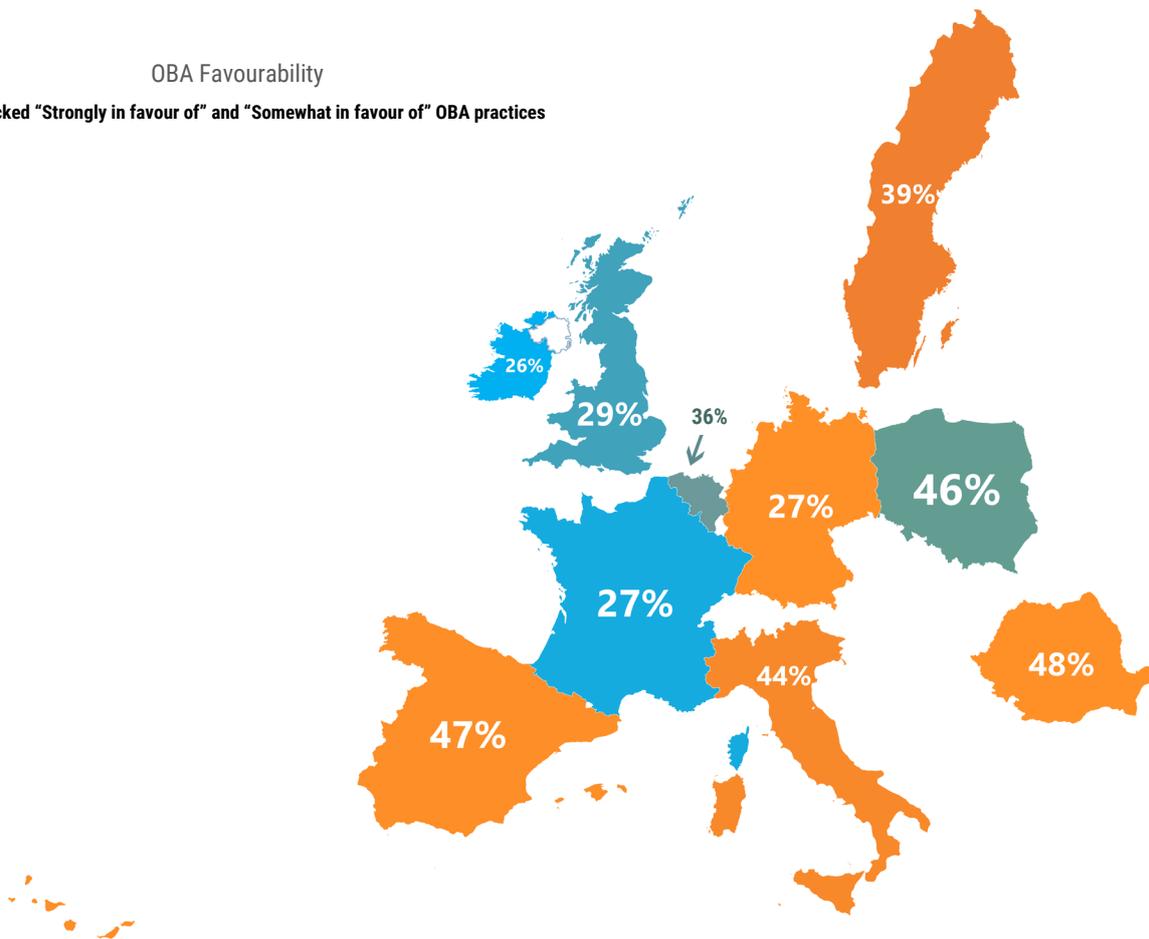


The rise in trust towards websites that feature the ad and the overall transparency in the digital advertising industry, which the presence of the AdChoices Icon catalyses, is noteworthy.

4.5 OBA Favourability

Participants were provided with an outline of what Online Behavioural Advertising (OBA) is and were then asked the extent to which they were in favour of - or opposed to - advertisers and websites delivering OBA. The proportions in favour of OBA vary across the surveyed markets, with a higher proportion in favour of this practice in Romania (48%), Spain (47%), and Poland (46%), to the more reserved countries in this respect such as Germany (27%), France (27%), and Ireland (26%).

OBA Favourability
% clicked "Strongly in favour of" and "Somewhat in favour of" OBA practices



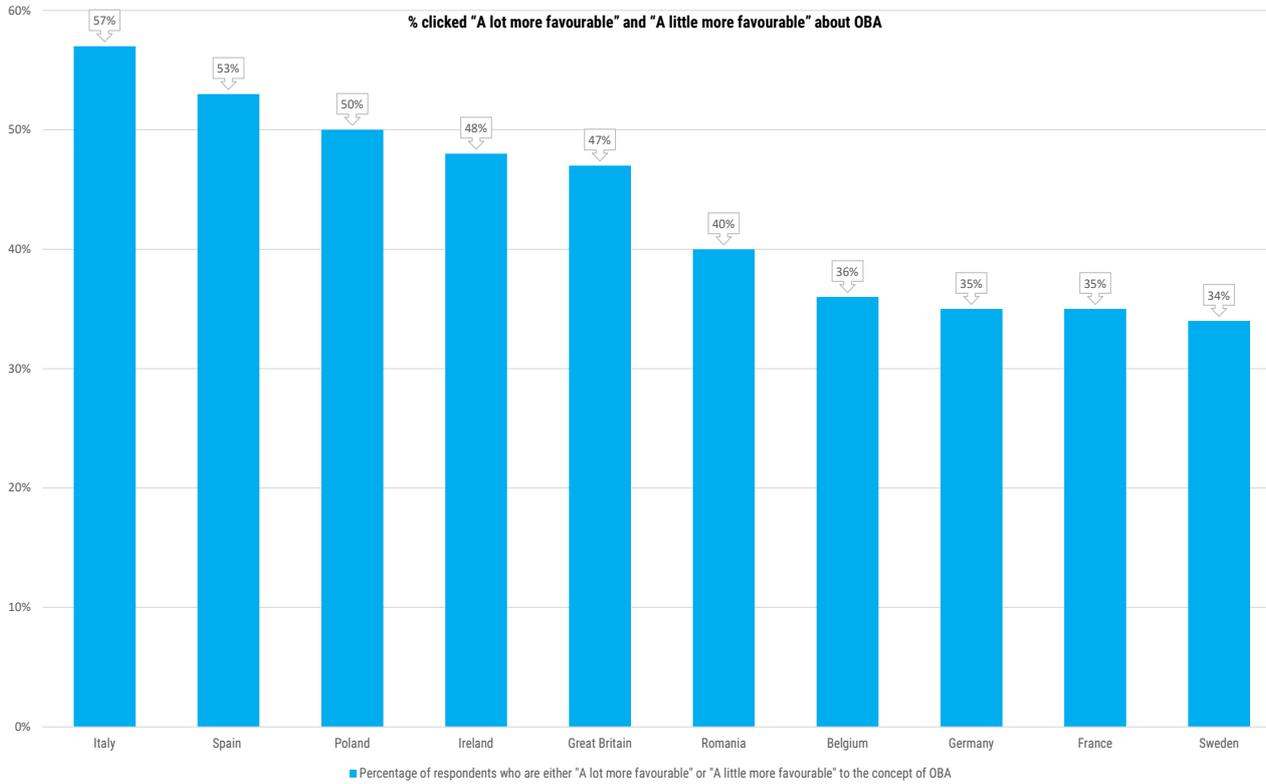
QA. To what extent are you in favour of - or opposed to - advertisers and websites employing OBA, or do you have no views either way?

Base: Adults (16 – 60/75) c.1000 respondents per market. Online interviews. Fieldwork dates and base sizes in EDAA Research methodology section.

[The previous section](#) highlighted the positive impact that the AdChoices Icon has on the trust of end-users towards websites, brands, and overall transparency in digital advertising. **However, perhaps one of the most positive findings of this survey is the impact that the AdChoices Icon and the information available to them has on general favourability towards OBA.** Particularly in markets where OBA favourability ratings are on the lower end of the scale, the presence of the Icon and the information available that enables users to manage their privacy preferences boost favourability considerably. 48% of respondents in Ireland, 47% in Great Britain, and half or more of those in Italy, Spain, and Poland have expressed being more favourable towards the concept of OBA. Respondents in Germany and France have also declared increased favourability towards OBA with 35% recorded in each country.



Impact of having information on YOC website on OBA favourability

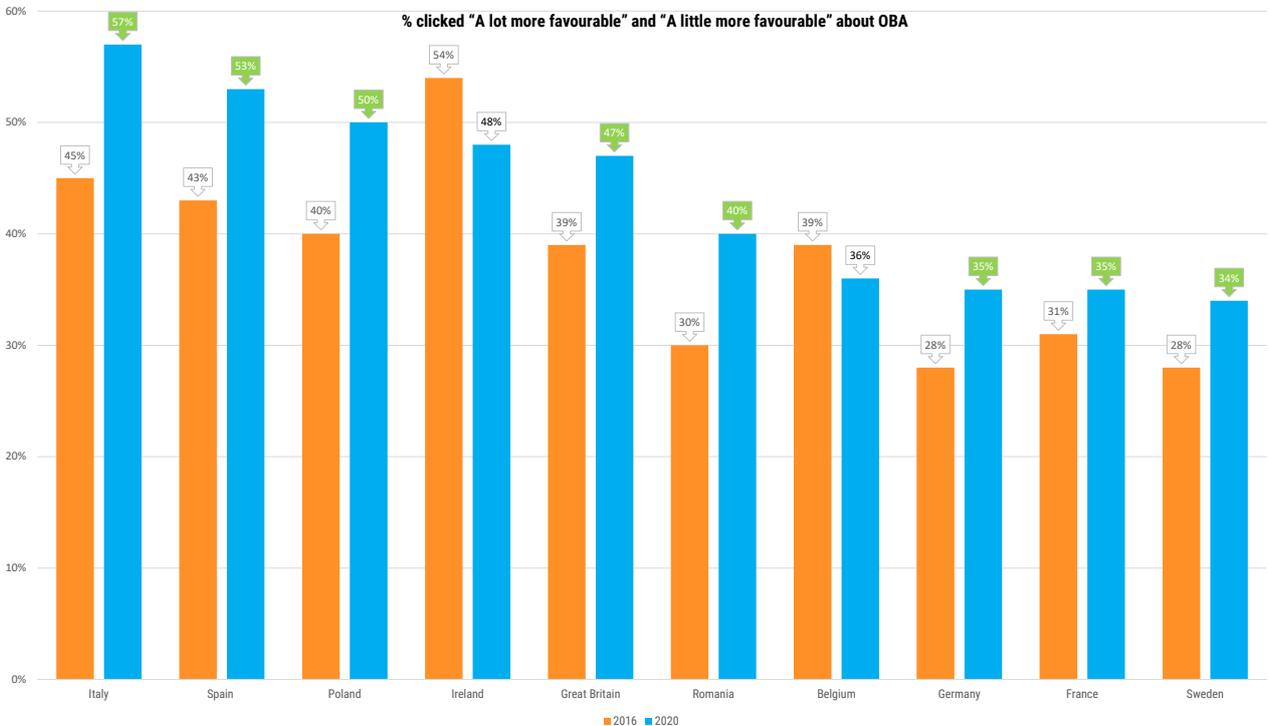


Q4. To what extent does having information available to you, and the option of managing your privacy preferences on the YOC website, make you more or less favourable about the concept of OBA?

Base: Adults (16 – 60/75) c.1000 respondents per market. Online interviews. Fieldwork dates and base sizes in EDAA Research methodology section.

Comparing the 2020 results to those of 2016, the positive trend is clear. In all but two markets, a higher proportion of respondents are more favourable about the concept of OBA thanks to having the YOC information available to them, and the option of managing their privacy preferences.

Impact of having information on YOC website on OBA favourability - 2016 v. 2020



Q4. To what extent does having information available to you, and the option of managing your privacy preferences on the YOC website, make you more or less favourable about the concept of OBA?

Base: Adults (16 – 60/75) c.1000 respondents per market. Online interviews. Fieldwork dates and base sizes in EDAA Research methodology section.





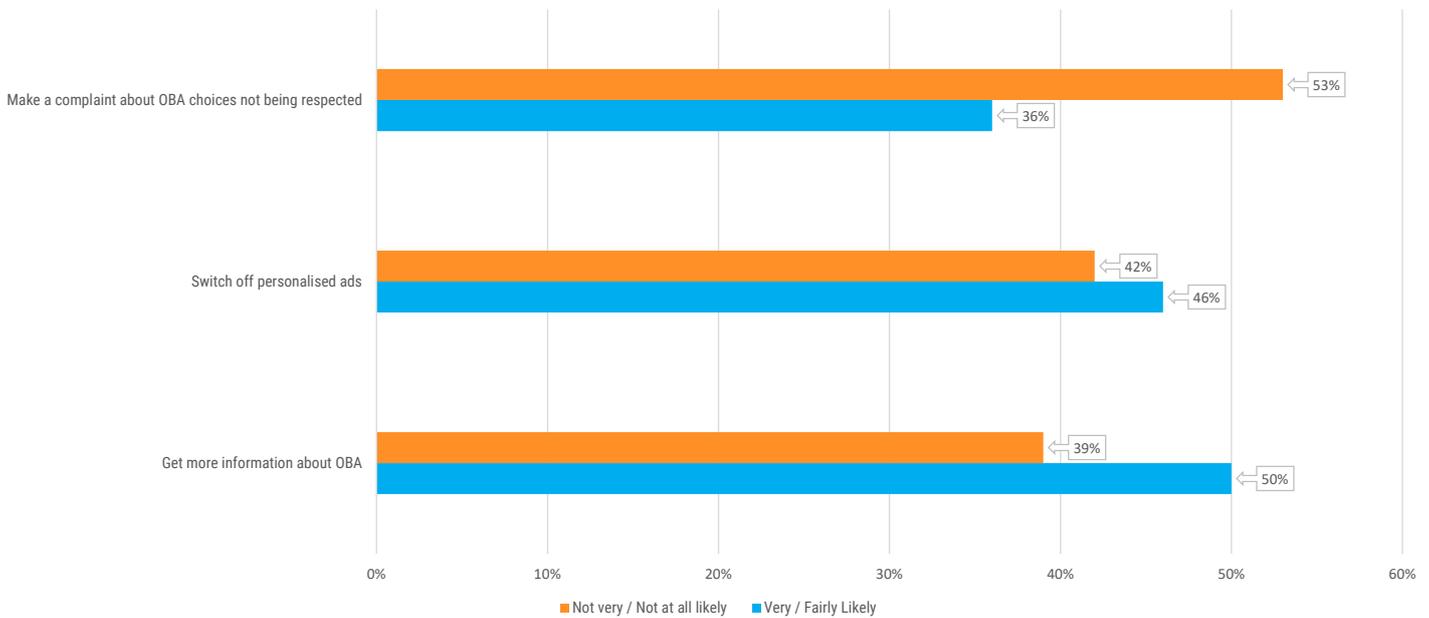
Particularly in markets where OBA favourability ratings are on the lower end of the scale, the presence of the Icon boosts favourability considerably.

The study asked respondents to think about Online Behavioural Advertising and to consider the extent to which they are likely or not to do each of the following:

- Make a complaint about their Online Behavioural Advertising (OBA) choices not being respected
- Switch off personalised ads (but continue to have non-personalised ads)
- Get more information about Online Behavioural Advertising

The chart below outlines the proportion of respondents who claimed they are “very likely” or “fairly likely” vs. “not very likely” or “not at all likely” to do each of these three activities:

OBA User Choices



Q7. Thinking about OBA, for each of these how likely or not would you personally be to ...

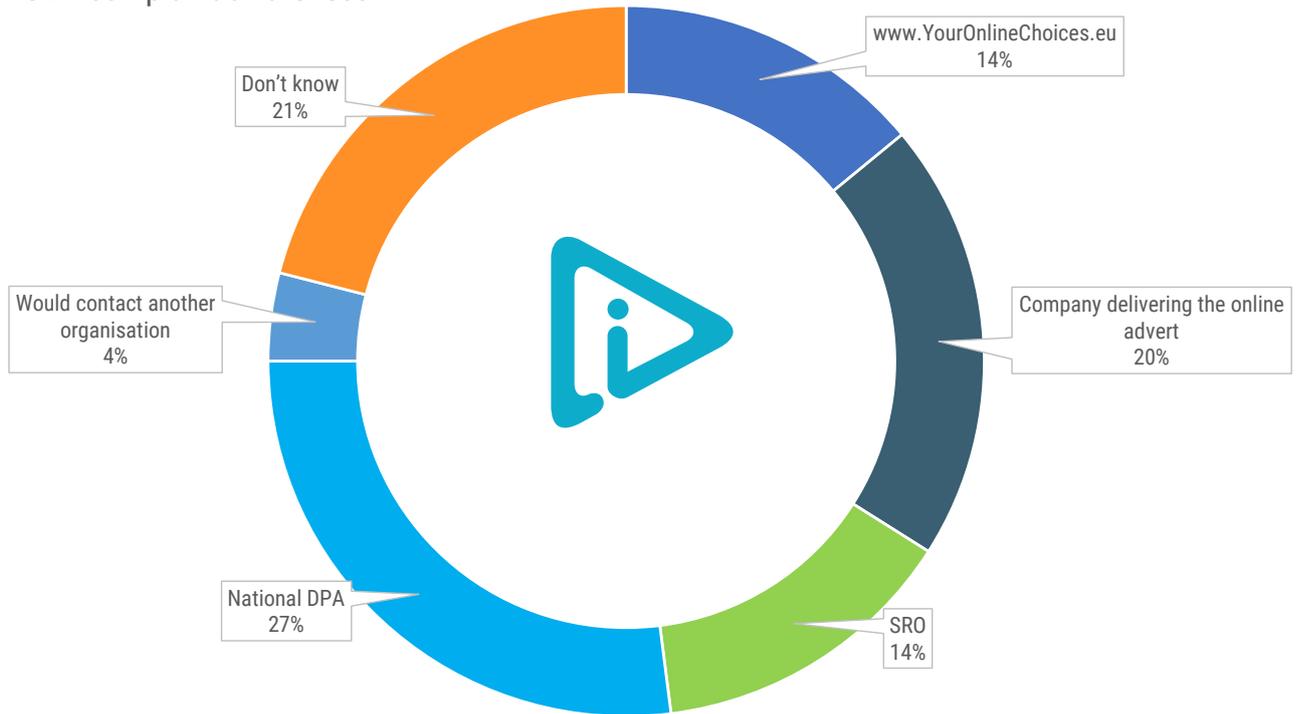
Base: Adults (16 – 60/75) c.1000 respondents per market. Online interviews. Fieldwork dates and base sizes in EDAA Research methodology section. Average of country scores. High likelihood = very + fairly likely. Low likelihood = not very + not at all likely

The likelihood of respondents making a complaint about their OBA preferences not being respected is quite low. Only 36% of respondents across all ten markets surveyed indicated they are likely to make such a complaint. Italian respondents are most likely to make a complaint (55%) alongside those from Ireland (50%). Least likely respondents to file OBA complaints with their SROs are those from Romania (65% responded that it is “not at all likely” that they would take this step). Encouragingly, one in two respondents has a high likelihood to seek more information about OBA.



The chart below highlights the responses of those likely to make a complaint when asked with whom such a complaint should be filed.

User OBA complaint awareness

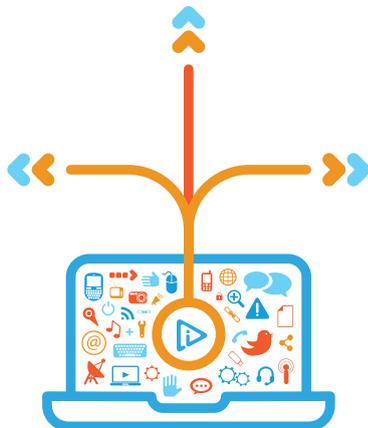


Q7b. Where do you think you can go if you wish to make a complaint about this advertising technique?

Base: All respondents very or quite likely to make a complaint c.200 to 500 respondents per market. Online interviews. Fieldwork dates and base sizes in EDAA Research methodology section. Average of country scores.

21% of responders do not know where to make a complaint about OBA, though they would be likely to do it should their choices not be respected - which indicates an important opportunity for educating and raising awareness.

Previous sections detailed the positive impact that the AdChoices Icon / AdMarker and the Programme as a whole have on respondents' perception of the brand, websites, and overall transparency of digital advertising, but it is imperative at this stage to highlight just how important the Programme is in terms of user behaviour.



The likelihood of respondents making a complaint about their OBA preferences not being respected is quite low.

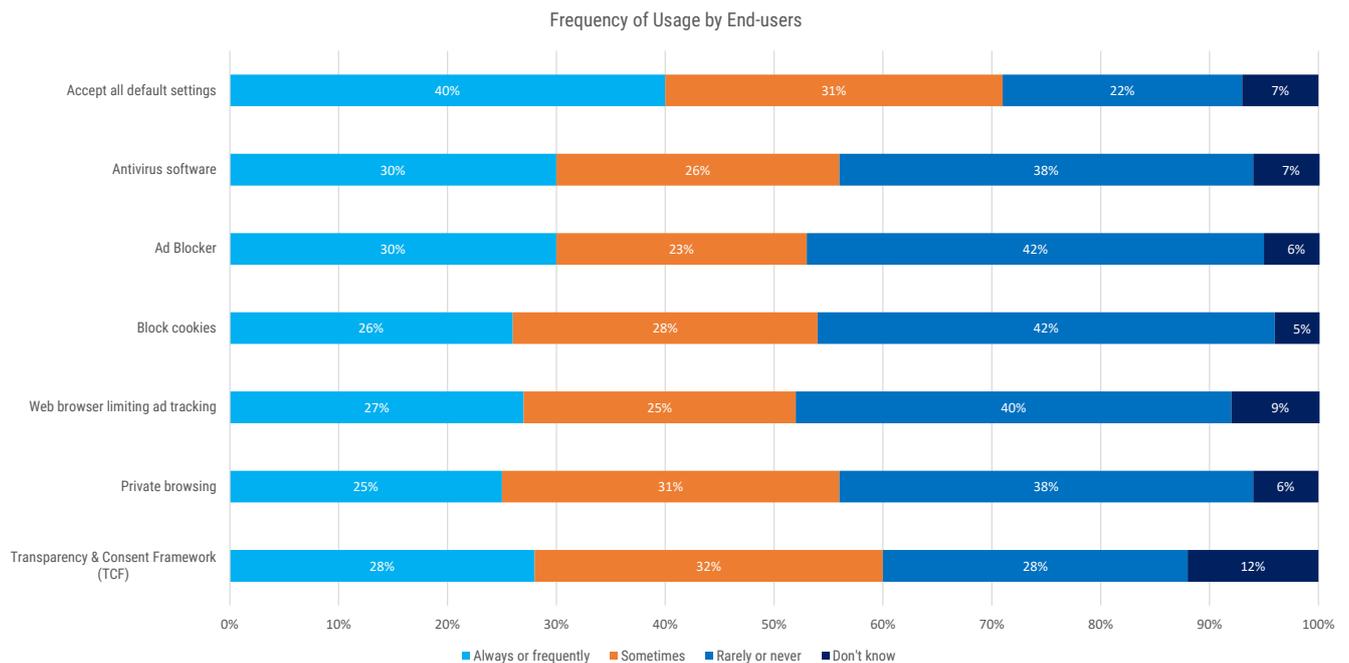


4.6 User behaviour

The 2020 edition of the study introduced a series of new questions that aim to provide an overview of user behaviour while browsing. The questions range from the use of ad blockers, to whether or not respondents accept default settings on websites.

The question focused on the frequency (always, frequently, sometimes, rarely, never) with which respondents do each of the following while using the internet:

- Accept all the default ad settings on websites in order to have free access to web content/services
- Set their antivirus software to block tracking /cookies
- Use an ad blocker (e.g. web browser extensions like uBlock, AdBlock, etc.)
- Block cookies on websites
- Use a specific web browser that limits ad tracking by default
- Use private browsing mode (which will not remember the pages visited nor leave cookies)
- Use the interface asking for their consent to different specified uses of data and different specified companies when they visit a website, part of an industry initiative called the Transparency & Consent Framework (“TCF”)



Q6. How often, if at all, do you do each of the following while using Internet?

Base: Adults (16 – 60/75) c.1000 respondents per market. Online interviews. Fieldwork dates and base sizes in EDAA Research methodology section. Average of country scores.

The survey results underline that:

- In terms of accepting all the default website ad settings, 40% of all respondents “always” or “frequently” do this, whilst only 22% “rarely” or “never” do. Respondents from Spain are most inclined to accept default settings, with 48% of them doing it “always” or “frequently”. Respondents in France are far less inclined to accept default settings, with 27% percent “rarely” or “never” doing this.
- Antivirus solutions that block tracking /cookies are employed by 30% of respondents “always” or “frequently”. The highest rates of blocking tracking/cookies through antivirus were registered in Italy (36%) and Germany (32%).
- Italian respondents are most likely to “always” or “frequently” det their antivirus software to block tracking /cookies (36%), while Romanians are least likely to do this (47%). Amongst all respondents, 30% “always” or “frequently” use their antivirus software for this purpose, while 38% will “rarely” or “never” do so.
- Ad blocker usage remains high, with 30% of respondents declaring they “always” or “frequently” use an ad blocker. The highest rate of ad blocker usage from the surveyed markets was recorded in Poland (35%), while the lowest was in Romania, where 48% of respondents stated that they rarely or never use such tools. Poland is trailed by Germany (31% of respondents frequently using ad-blockers), while 46% of respondents in Ireland rarely or never use them.
- Cookies are blocked “always” or “frequently” by 30% of respondents in Germany, and “rarely” or “never” by respondents from Poland, 51% of them seldomly resorting to this. Overall, 26% of respondents block cookies “always” or “frequently” when browsing, while 42% do this “rarely” or “never”.
- Private browsing is “always” or “frequently” used by 25% of all respondents, with the peak rates once again reported in Poland (47%) and the lowest in Romania (45%).
- Use of IAB Europe’s Transparency and Consent Framework by respondents is split in terms of frequency. 28% of respondents declare that they “always” or “frequently” knowingly make use of it, while an equal percentage very “rarely” or “never” does and many are unsure.



In terms of accepting all the default website ad settings, 40% of all respondents “always” or “frequently” do this, yet Ad blocker usage remains high, with 30% of respondents declaring they “always” or “frequently” use an ad blocker.

4.7 Enhancing youronlinechoices.eu

The closing question was designed to identify further avenues for improvement of the www.youronlinechoices.eu portal and assess which, if any, activities respondents would like to see on the www.youronlinechoices.eu website.

What respondents want most is understanding how they can control advertising companies having access to their data (38%) and clearer explanations about how their data is being used by organisations (38%), with respondents flagging these as their main choices. There are followed by having more information on the organisations that use their data (36%), the ability to customise the data they share (36%), and being able to easily manage their ad choices across multiple websites (35%). Only one in fourteen (7%) of respondents said that they would not like to be able to do any of these six activities.



Q10. Which, if any, of the following activities would you like to be able to do on youronlinechoices.eu?

Base: Adults (16 – 60/75) c.1000 respondents per market. Online interviews. Fieldwork dates and base sizes in EDAA Research methodology section. Average of country scores.





1. Awareness of the AdChoices Icon is growing in all markets, often strongly

Awareness of the AdChoices Icon has shown a marked improvement since the previous versions of the survey. In all ten surveyed markets respondents have shown an increased awareness of the Icon. In fact, there has been a double-digit percentage point rise in AdChoices Icon awareness since the 2016 iteration of the study in 8 out of 10 markets. What is both exciting and encouraging is that this trend applies to both the Icon accompanied by the explanatory AdMarker text and also the Icon as a standalone symbol without it, with three countries reporting hikes in awareness as high as 20 percentage points above the findings of the last survey iteration in 2016.

2. Engagement with the AdChoices Icon reaches higher levels

Marked improvement across all ten markets was also recorded in terms of engagement with the AdChoices Icon. About half or more of respondents in each of Sweden, Belgium, Romania, Germany, Spain, and Poland declare that they have clicked on the Icon. Compared to the 2015 vs. 2016 growth rate, the increase that the 2020 survey shows in terms of engagement is striking. Germany is just one example of a market that nearly doubled the engagement rate since 2016. In previous survey iterations, engagement levels in Great Britain were around a quarter. In 2020, this increased to 39%.

3. The AdChoices Icon has a clear positive impact on end-user trust in brands, websites, and transparency in the overall digital advertising ecosystem, and on the concept of OBA as a whole

More than three in ten respondents from all markets have stated that they have a higher level of trust in the brand advertised when the AdChoices Icon is present, and the proportion claiming to trust the brand being advertised increased in 9 out of 10 markets. Italy is a notable example of the positive influence the AdChoices Icon can have on brand trust: more than half of respondents from this market demonstrated increased trust in brands that bear the AdChoices Icon on their ads.



Based on this evidence that the AdChoices Icon improves brand trust, we encourage brands to ensure that they work with partners in their supply chain that can demonstrate full compliance with the industry's self-regulatory approach administered by EDAA.

The trend holds true beyond increased trust of the brand being advertised. The AdChoices Icon is a boon for OBA practices in general. Particularly in markets where OBA favourability ratings are on the lower end of the scale, the presence of the AdChoices Icon and the ability for users to manage their online privacy preferences increases OBA favourability. Having the Icon present increases OBA favourability by 22 percentage points in Ireland and 18 percentage points in Great Britain, for example. Over half of respondents in Spain and Poland are more favourable towards the concept of OBA.

Presence of the AdChoices Icon also increases the proportion of respondents who trust websites that feature ads and overall transparency in the digital advertising industry. More than half of respondents in Italy declare increased trust in websites that feature ads bearing the Icon. A similar approach was recorded in Spain. Over 4 in 10 respondents from Romania, Poland, and Great Britain also put more trust in websites which display the AdChoices Icon.



Based on these findings, publishers should be encouraged to adopt the AdChoices Icon from the EDAA on their websites, as a complementary and well recognised transparency vehicle towards their viewers, to inform that third party advertising may be happening across their platforms.

The increased awareness and favourability of the Icon serves as a strong incentive for greater uptake at site level (this can be applied in the footer of web pages and link through to the site's advertising policies, for instance).

4. There is a need to further improve understanding of the AdChoices Icon

Understanding what the Icon means represents both a challenge and an opportunity. Improvement from previous iterations of the survey can be observed, particularly in terms of how high on the list of options for respondents the correct option ranks.

It is clear, however, that the EDAA Programme, and the wider digital advertising ecosystem, need to continue placing an emphasis on further educating consumers and raising awareness about the options available to them that allow for a healthy digital advertising experience.

5. User behaviour shows promising trends but also highlights areas for future focus

Insofar as making a complaint about their Online Behavioural Advertising (OBA) choices not being respected, more than 1 in 3 respondents have expressed a willingness to take this step. For those wishing to do so, EDAA makes available prominent information on the www.youronlinechoices.eu website, which is visited tens of millions of times annually. The self-regulatory programme is also integrated with well-established complaint handling bodies (SROs) at national level, under the umbrella of the [European Advertising Standards Alliance \(EASA\)](http://www.easa.europa.eu). These ensure that consumers can make queries or complaints and receive responses in their own language. It is important to make these options as prominent as possible: of those wanting to make a complaint about Online Behavioural Advertising (OBA), 21% don't know with whom such a complaint can be filed. It is positive to observe that 28% of respondents are aware that they can make complaints, if they wish to do so, through the YourOnlineChoices.eu website and to their national advertising Self-Regulatory Organisation (SRO), more than any other route. This indicates potential key advantages of the EDAA Programme in terms of consumers' ability to raise queries and complaints and learn more about the types of advertising they receive online.

6. Consumers care about how companies are using their information, and have views on what controls they would use, if available

As EDAA is engaged in a process to review and better understand consumer expectations of YourOnlineChoices, it is noteworthy that very few respondents seemed disinterested in having greater control over their online experience. Many respondents expressed a strong desire for clearer explanations about how their data is being used by the organisations that use their data and understand how they can control advertising companies having access to their data.



One in two respondents is likely to seek more information about OBA. The Programme and the latest EDAA efforts in the field of consumer education (most notably the recent project with Media Smart and the [youronlinechoices.eu](http://www.youronlinechoices.eu) website) contribute significantly to this very need. In fact, this propensity of respondents to improve their understanding of online advertising practices and the ecosystem as a whole is a valuable driver and insight for the future development of the EDAA's cross-industry, pan-European self-regulatory programme.

EDAA is open and inclusive to consumer views in its approach and the learnings from this report will support our efforts as we lead an industry-wide dialogue to address consumer needs and improve the advertising experience first-and-foremost from a consumer-centric viewpoint.

Appendix for previous methodologies

Methodology and findings of the European Advertising Consumer Research Report 2016 are available [here](#)

Methodology and findings of the European Advertising Consumer Research Report 2015 are available [here](#)

Methodology and findings of the European Advertising Consumer Research Report 2014 are available [here](#)



