

RESEARCH REPORT

# European Advertising Consumer Research Report 2015

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

Independent research conducted by Ipsos MORI on behalf of TRUSTe and the EDAA



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## INTRODUCTION



As an approved Icon and Certification provider at TRUSTe, we are committed to the ongoing success of the European Self-Regulatory Programme for OBA.

We are delighted to continue working with the EDAA and Ipsos MORI to provide clear benchmarking data against which the success of the European Self-Regulatory Programme can be assessed across Europe. In its second year the research has been extended to cover 13 European markets and provides valuable data for brand advertisers, ad networks, regulators and journalists alike to demonstrate the growth of the European Self-Regulatory Programme across Europe.

This year's results show increasing awareness and ongoing positive effect of this important self-regulatory initiative that gives transparency and control over advertising choices to European consumers and is achieving growing recognition and momentum amongst the industry and regulators.

Chris Babel, CEO TRUSTe



The 2015 Consumer Research Report, in conjunction with TRUSTe and Ipsos MORI, shows growing consumer recognition and understanding of the European Self-Regulatory Programme on OBA. Building on the 2014 edition, the research adds insights from Bulgaria, Ireland and Finland.

Importantly, when presented with the Self-Regulatory Programme, these findings show significant potential increases in consumer favourability towards OBA (up to 59% in Ireland) and trust in the brand being advertised (up to 56% in Bulgaria).

The report comes as European policy makers take key decisions that will affect online ad business models. We're proud to demonstrate, through this report and the day to day operation of the Self-Regulatory Programme, how effective ad self-regulation can and should be considered as a viable element of the policy mix in this space.

Dr. Oliver Gray, Director-General, EDAA

## EXECUTIVE SUMMARY OF RESEARCH FINDINGS

The European Advertising Consumer Research Report 2015 provides a comprehensive picture of consumer attitudes and awareness of the European Self-Regulatory Programme for Online Behavioural Advertising (OBA) across Europe.

The study was conducted by Ipsos MORI, on behalf of TRUSTe and the EDAA from 21 October - 13 November 2015 with over 13,000 consumers across 13 different European markets.

The countries chosen - Bulgaria, Finland, France, Germany, Great Britain, Greece, Hungary, Ireland, Italy, Poland, Portugal, Spain and Sweden - were selected based on range of geographic spread and current implementation status of the European Self-Regulatory Programme. Tracking data is available for ten of these markets where TRUSTe and the EDAA conducted comparable research in 2014. Certain findings from Great Britain are also trackable where TRUSTe ran comparable research in 2012 and 2013.

There is an urgent industry need to increase consumer understanding of the value of advertising, which supports online content and services often at little to no cost for the consumer, and the importance of programmes which enable consumers to exercise meaningful choice with regard to online behavioural (commonly referred to as 'interest-based') advertising, as opposed to blocking ads altogether.

The good news is that the results show that awareness of the OBA Icon continues to rise and those who have seen the Icon are choosing to find out more with at least 1 in 4 consumers in ten European markets clicking on the Icon. The Programme can have a positive effect on attitudes too, with favourability towards the idea of online behavioural advertising rising in all countries surveyed if consumers have a way to opt-out.

A summary of key findings is presented below:

- Consumer awareness of the OBA Icon and Admarker is highest in Portugal (40%), Greece (38%) and Ireland (32%) followed by Great Britain (28%) where awareness has risen steadily for the last four years.
- Across nearly all countries surveyed the recognition of the OBA Icon is greater when accompanied by the Admarker text e.g. "AdChoices".
- At least 1 in 4 users have clicked on the Icon in ten of the European markets surveyed.
- Understanding of the Icon is increasing with consumers in 11 countries placing "manage their privacy preferences" in their top two choices for the meaning of the Icon, compared with only 4 countries in 2014.
- All countries demonstrated potential for increase in favourability for the concept of OBA and increase in trust for the brand advertiser through the Self-Regulatory Programme, with a potential 59% increase in Ireland.

## BACKGROUND TO THE PROGRAMME FOR OBA

The majority of internet users want control over their privacy on the Internet. However they also acknowledge the important role that online advertising has to play in making content and services available, often at little or no cost. The European Self-Regulatory Programme for Online Behavioural Advertising (OBA) seeks to strike that balance by empowering consumers with greater contextual transparency and control.

At the heart of the European Self-Regulatory Programme on OBA is an interactive pan-European icon to identify ads that are delivered to internet users 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, <http://www.youronlinechoices.eu>, where they can find easy-to-understand information on the practice of OBA as well as a mechanism for exercising informed choice – if they so wish, consumers may 'turn off' OBA for some or all 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 OBA Icon and preference management platform.

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

TRUSTe, amongst others, has been approved by the EDAA as both an Icon and Certification provider for the European Self-Regulatory Programme.

The Programme is enforced by the relevant advertising Self-Regulatory Organisation (SRO) in each country (e.g. the ASA in the UK). 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 OBA Icon. For non co-operative, serious, persistent and/or deliberate offenders, the SRO may also refer the company to the competent national regulatory authority e.g. the Information Commissioner's Office (ICO) in the UK.

## EDAA'S CONSUMER AWARENESS CAMPAIGN

Education is a core principle behind the European Self-Regulatory Programme, and the EDAA launched a pan-European consumer awareness campaign in 2013 to help empower European citizens to make their own choices about online advertising.

The campaign provides information about the OBA Icon and the [www.youronlinechoices.eu](http://www.youronlinechoices.eu) website to the general public. The campaign aims to increase awareness and understanding of the Programme, whilst enhancing consumer transparency and control. Consumers are empowered through greater awareness of their online ad choices and also learn how online advertising helps to fund sites and services they use.

Between 2013 and the end of 2015, the EDAA will have run the campaign across 11 different countries - including two bursts in Germany and Portugal.

The campaign has delivered over 680m total impressions and nearly 170m unique impressions across all markets so far. In addition, more than 650,000 clicks have been made with an average click through rate (CTR) of 0.10.

The new creative has already proved highly effective - with an average CTR more than twice as high (0.17) as the original banner ads (0.08).

### Impressions delivered across Europe

	DE (1)	DE (2)	UK	GR	FR	FI	IE	HU	SE	PT	BG	Total
Total Impressions (in millions)	220.8	123.4	112.3	41.8	37.6	34.1	26.7	25.8	21.9	7.8	6.6	658.9
Unique Impressions (in millions)	74.9	30.4	26.2	4.0	6.5	6.6	2.8	3.7	2.4	1.4	1.6	160.6

### Clicks delivered across Europe (including CTR)

	DE (1)	DE (2)	UK	GR	FR	FI	IE	HU	SE	PT	BG	Total
Total clicks	216,299	169,739	107,881	37,386	30,937	17,110	16,013	14,701	9,147	8,563	7,170	634,946
CTRs	0.18	0.08	0.1	0.14	0.07	0.05	0.06	0.04	0.04	0.11	0.11	0.096

### Original creative assets (2013 to 1H 2015)

A selection of the English language designs and formats are shown. These were translated into local language for the 9 European markets in which the campaign ran across this period.

#### OBA "Reveal" execution (300 x 250)



OBA "Behind" execution (728 x 90)

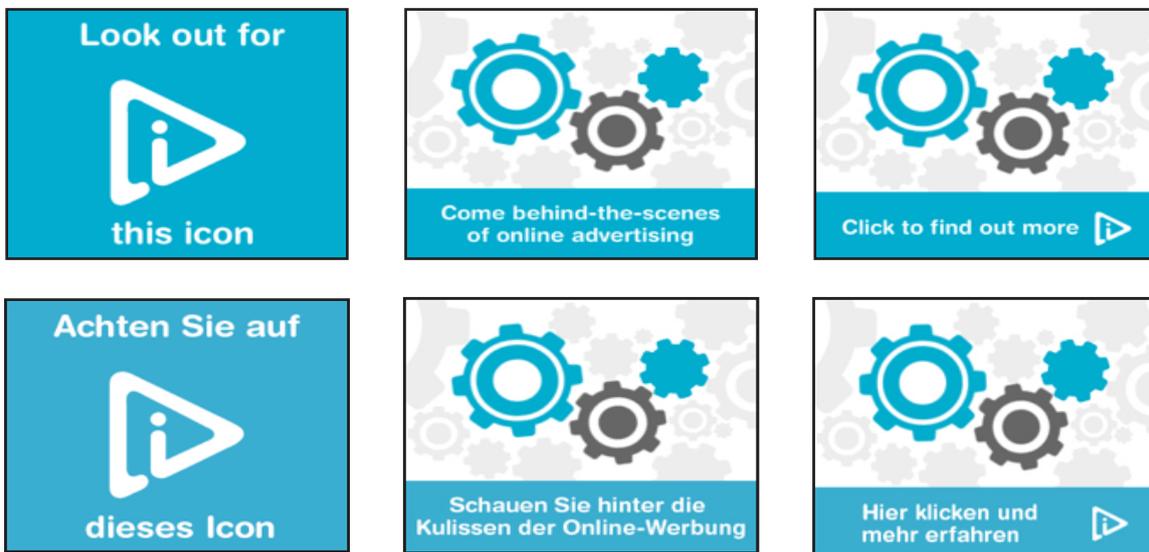


New creative assets (2H 2015 onwards)

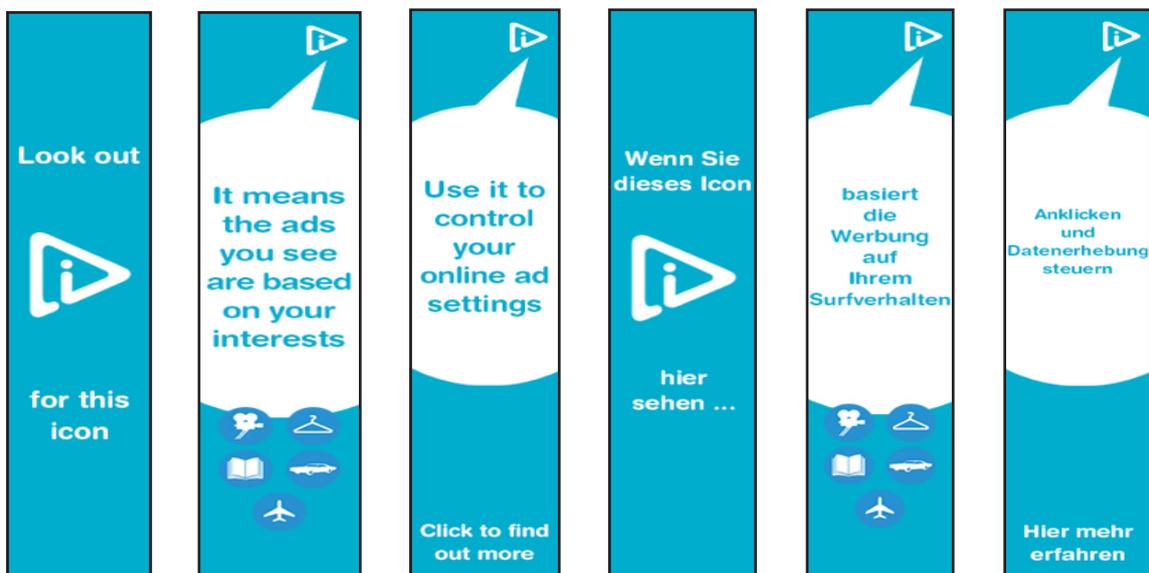
The EDAA has developed three unique designs (Inner Workings, Icon Zoom and User Control) with two different copy messages for the Inner Workings version.

A few examples of the English and German language versions are shown below. Again, these will be translated into local language for all future campaigns (including Bulgaria, Spain and Portugal across Q4 2015).

Inner Workings



Icon Zoom



**User Control**

**Datenerhebung für Online-Werbung steuern**

**Nutzen Sie dieses Icon**

**Mehr dazu auf youonlinechoices.eu**

**SURVEY METHODOLOGY****Sampling**

Interviews were carried out on Ipsos MORI's online i:Omnibus service 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 ages of adults interviewed for each country were as follows: Great Britain and France (adults aged 16-75), Germany and Italy (adults aged 16-70), Spain and Sweden (adults aged 16-65), Hungary and Poland (adults aged 16-60), Finland and Ireland (adults aged 18-65), Portugal and Bulgaria (adults aged 18-55), and Greece (adults aged 18-50).

**Weighting**

Across all countries data are weighted by age, gender, region and working status to the known offline population profile. For some countries, additional weighting criteria are included. Data for Great Britain are also weighted by social grade (using the NRS social grade classification system), while data for Germany are weighted by household size.

**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.

No cash incentives are provided for completing the surveys. Panellists do, however, earn points according to the survey length. When panellists accumulate enough points they can order different shopping vouchers from the dedicated website.

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 27001:2005, the international standard for information security. Further, Ipsos MORI is required to comply with the UK Data Protection Act, which covers the processing of personal data and the protection of privacy.

Furthermore, all online research carried out by Ipsos MORI is done so in accordance with ESOMAR guidelines relating to online research (for more information, please see here: <https://www.ipsos-mori.com/Assets/Docs/Techniques/ESOMAR-28-Questions.pdf>)

## DETAILED FINDINGS

The European Advertising Consumer Research Report 2015 was commissioned by TRUSTe and the EDAA, to assess the ongoing progress of the European Self-Regulatory Programme for OBA against clear benchmarks.

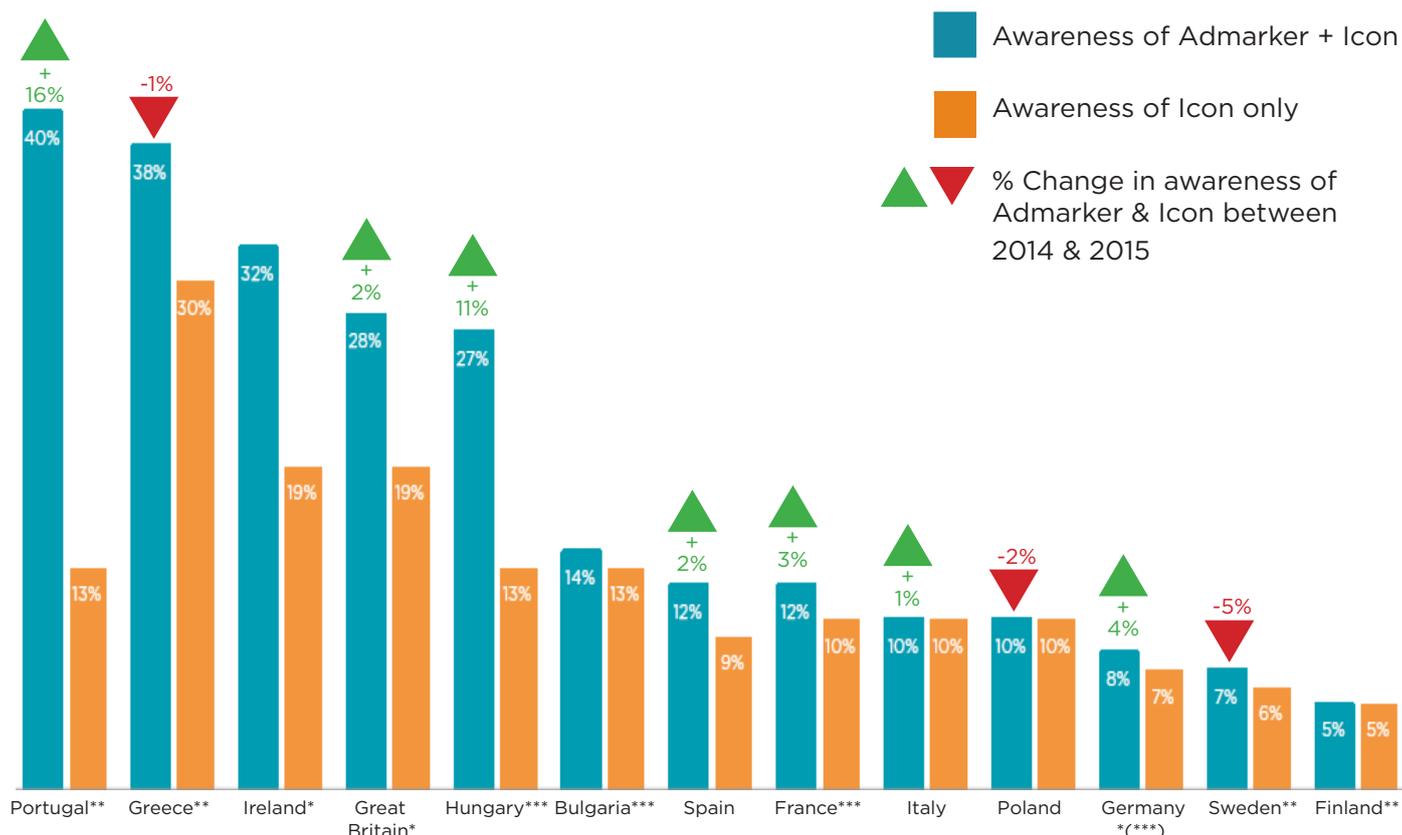
Completed in the third year of the Programme, the questions were designed to measure consumer attitudes and perceptions of the European Self-Regulatory Programme and determine the current levels of recognition and understanding of the OBA Icon and the YourOnlineChoices website. This is the second year that the research has been conducted, enabling comparisons to be made against last year’s benchmarking research where the questions are comparable.

### 1.1 Awareness of the OBA Icon

Consumers were asked whether, before this survey, they had seen either the OBA Icon or the OBA Icon accompanied by the Admarker text. The UK version is shown below although the localised version was shown for the different European markets in which the research was conducted. The order of the two options was rotated within the questionnaire.

1. AdChoices 
2. 

The table below shows the percentage of consumers who spontaneously recognised the OBA Icon. The countries are listed in order of those who had seen the OBA Icon + Admarker with the comparable percentage of OBA Icon awareness listed alongside.



\* Countries that have conducted a consumer awareness campaign in 2013

\*\* Countries that have conducted a consumer awareness campaign in 2014

\*\*\* Countries that have conducted a consumer awareness campaign in 2015

(\*\*\*\*) Germany launched a ‘second wave’ awareness campaign on 11 October 2015, which is set to run until end November 2015

Additional notes: The campaign in Bulgaria was launched on 30 October 2015, and will run through to the end of January 2016. As the research for Bulgaria was run between 30 October and 5 November, this overlaps only with the initial 7 days of the EDAA's awareness campaign in the market. As this is the first year that Bulgaria, Finland and Ireland have been included in the research, no comparison data is available

Overall the results show that recognition of the OBA Icon with Admarker continues to rise and consumer awareness campaigns can have an immediate boost.

Recognition of the OBA Icon with Admarker has increased in 7 out of 10 markets where tracking data is available, and fell slightly in Poland and Sweden. In Greece the awareness of the OBA Icon with Admarker also dropped slightly by 1% but the awareness of the OBA Icon rose by 6%. It is encouraging to see the extent to which awareness levels have a visibly long lasting impact with market awareness either increasing or remaining constant, with the notable exception of Sweden.

Where tracking data is available, it is also of interest to note that each market where an awareness campaign has run in 2015 (Germany, France and Hungary) has seen an increase in recognition, both in terms of the OBA Icon with Admarker and OBA Icon only.

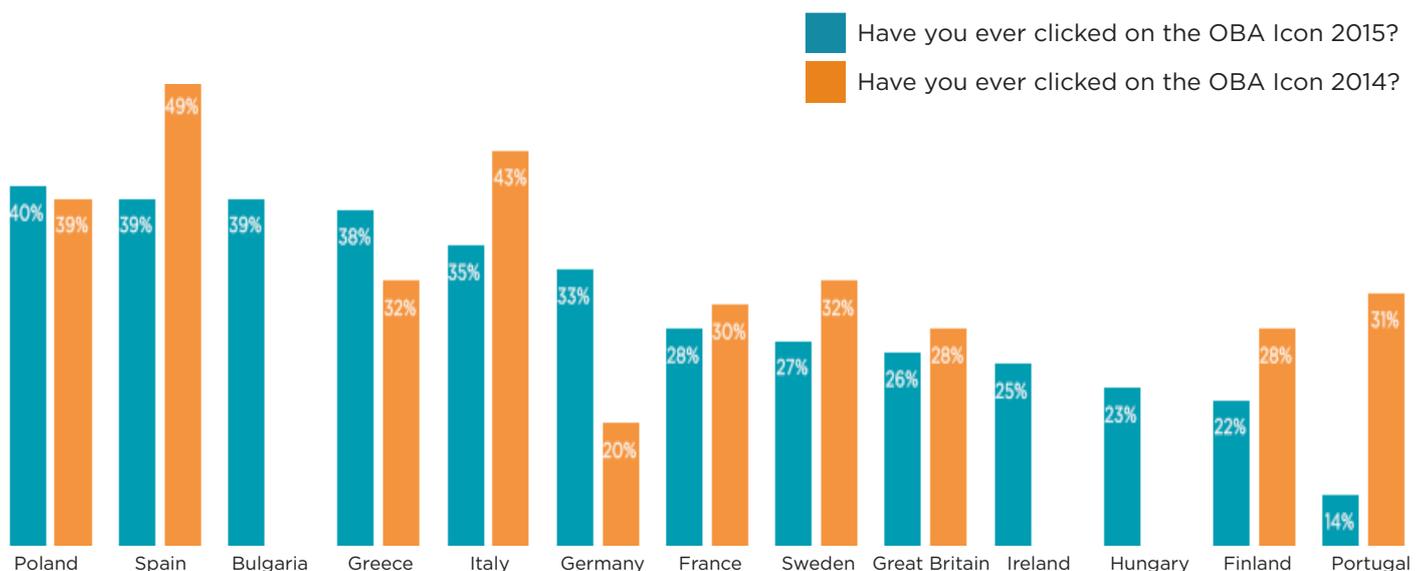
It is also especially encouraging to see the significant boost in recognition of the OBA Icon with Admarker in Portugal where the awareness campaign ran shortly after the previous research activity had concluded in 2014.

Great Britain is the only country for which long-term tracking data exists and here awareness continues to rise from 13% in 2012 to 22% in 2013, 26% in 2014 and now 28% in 2015 showing a steady upward trend.

Across nearly all countries surveyed the recognition of the OBA Icon is greater when accompanied by the Admarker text e.g. "AdChoices". This is particularly striking in Portugal where awareness of the Icon + Admarker text is 40%, the highest across all the markets surveyed. This drops to 13% when the Icon is used in isolation.

## 1.2 Engagement with the OBA Icon

Respondents that recognised the OBA Icon were then asked if they had ever clicked on the Icon. The results show the extent of interaction with the Icon across Europe with at least 1 in 4 users having clicked on the Icon in 10 of the European markets surveyed: Poland, Spain, Bulgaria, Greece, Ireland, Italy, Germany, France, Sweden and Great Britain. Further details are in the table below:



### 1.3 Understanding of the Icon

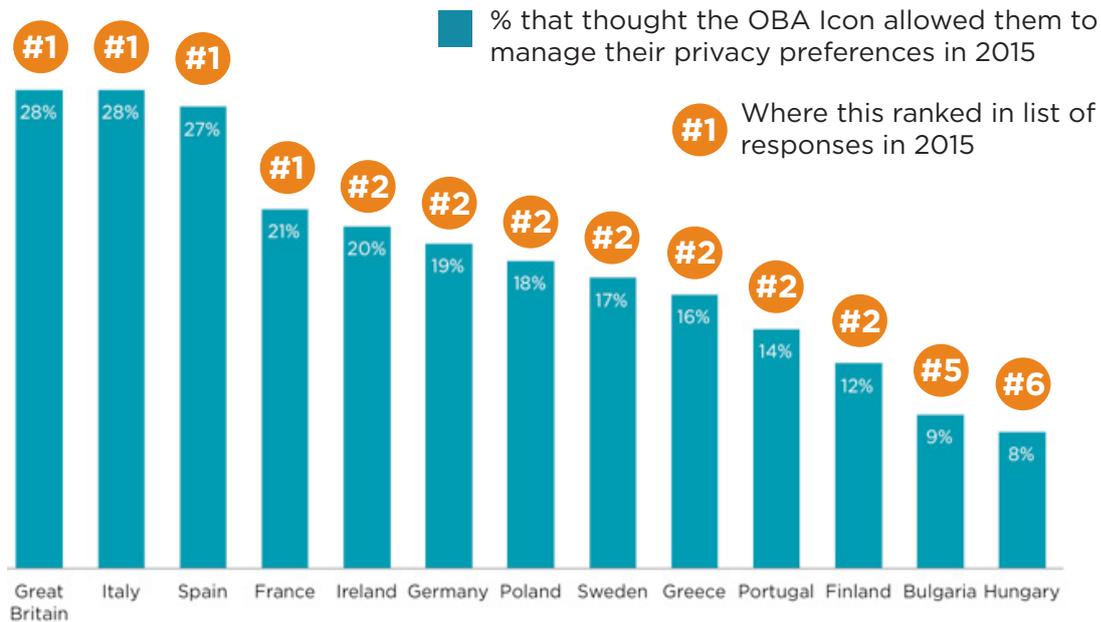
All respondents were then shown a sample advert and asked which of the following responses they thought best described what they thought the Icon meant. (Finnish version shown - localised for all European markets)



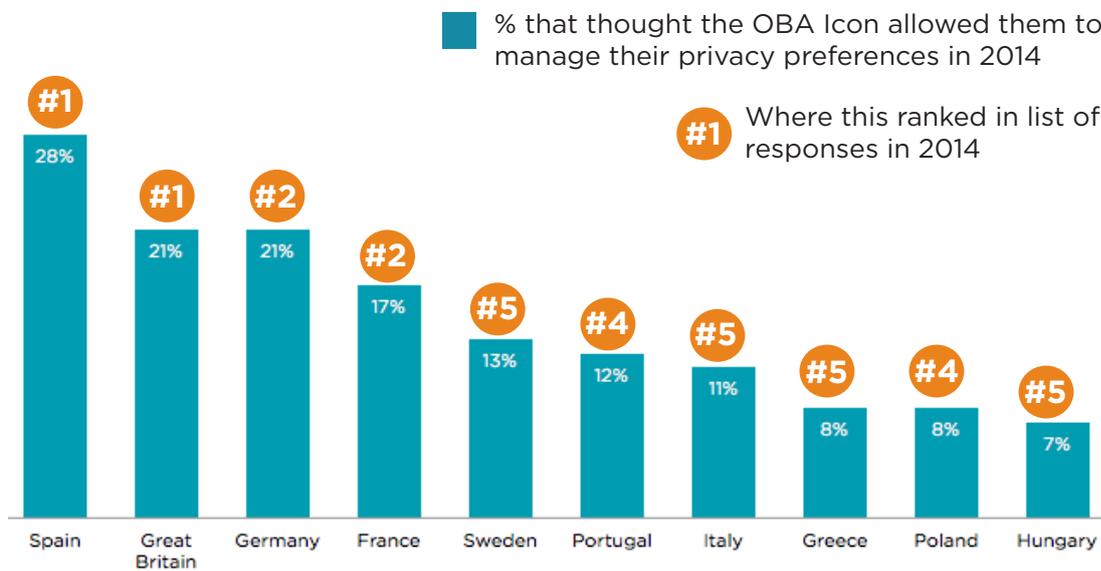
- a) The logo of the brand being advertised
- b) Click to see a video
- c) Click to manage your privacy preferences
- d) This is a safe advert
- e) Click to visit the brand's website
- f) Click to exit the advert
- g) Other
- h) Don't know
- g) Other

Great Britain, Italy, France and Spain top the list of countries where the meaning of the Icon is best understood. The results show that understanding is increasing, with consumers in 11 countries placing "manage their privacy preferences" in their top two choices for the meaning of the Icon compared with only 4 countries in 2014. In some countries there were considerable increases in understanding compared with 2014, most notably in Italy where 28% of consumers understood the Icon helped them to manage their privacy preferences compared with 11% in 2014.

## 2015 RESULTS



## 2014 RESULTS

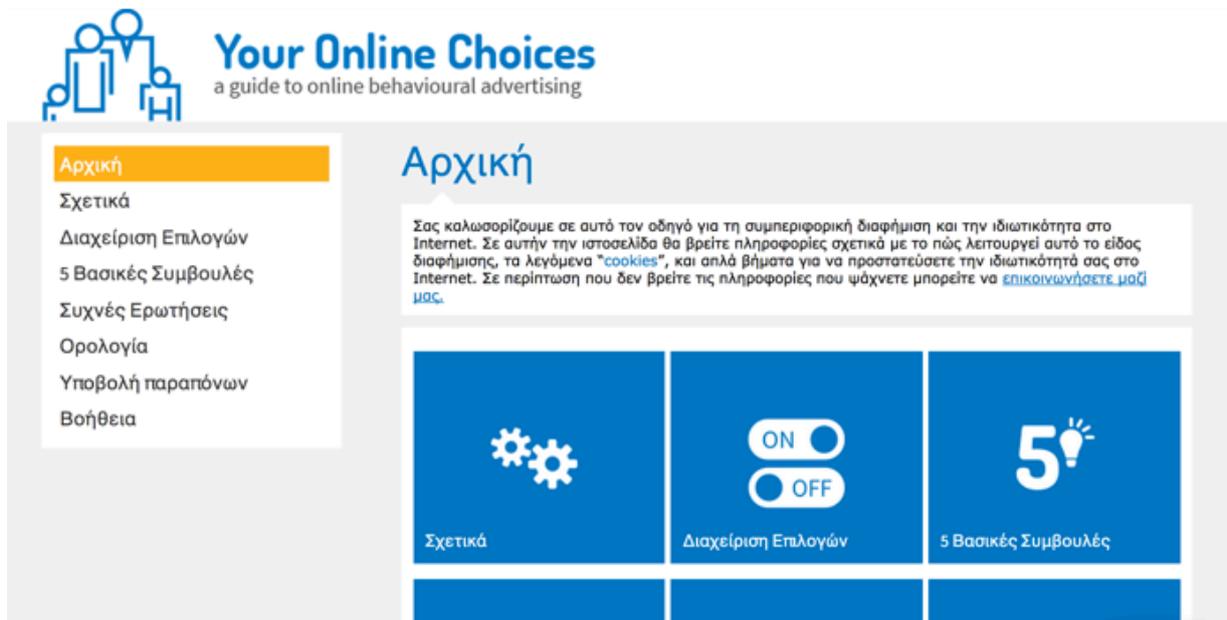


The remaining two countries, Hungary and Bulgaria, show that while awareness of the Icon may be on a par with other European markets at 27% and 14% respectively, there is still more to be done to increase understanding of its purpose.

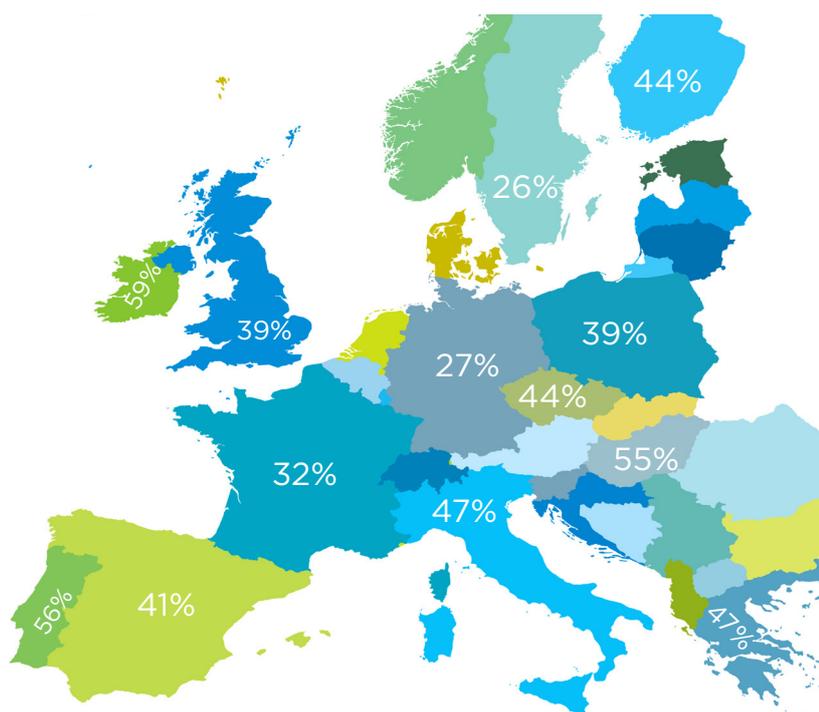
### 1.4 Impact of the European Self-Regulatory Programme on Attitudes to OBA

To close the circle for consumers, companies involved in the collection and use of data for OBA purposes must integrate onto the “Consumer Choice Platform” at [www.youronlinechoices.eu](http://www.youronlinechoices.eu) (YOC), providing consumers with the option to ‘turn off’ (or turn back on) this data collection and use by some or all participating companies. This consumer choice and control is a core component of the European Self-Regulatory Programme.

Consumers were shown an image of the [www.youronlinechoices.eu](http://www.youronlinechoices.eu) website homepage (Greek version shown here – the survey was fully localised for European markets) alongside an explanation that this is where they can find information about online behavioural advertising, manage their preferences, and/or make a complaint about a company’s use of online behavioural advertising to their national advertising standards body:

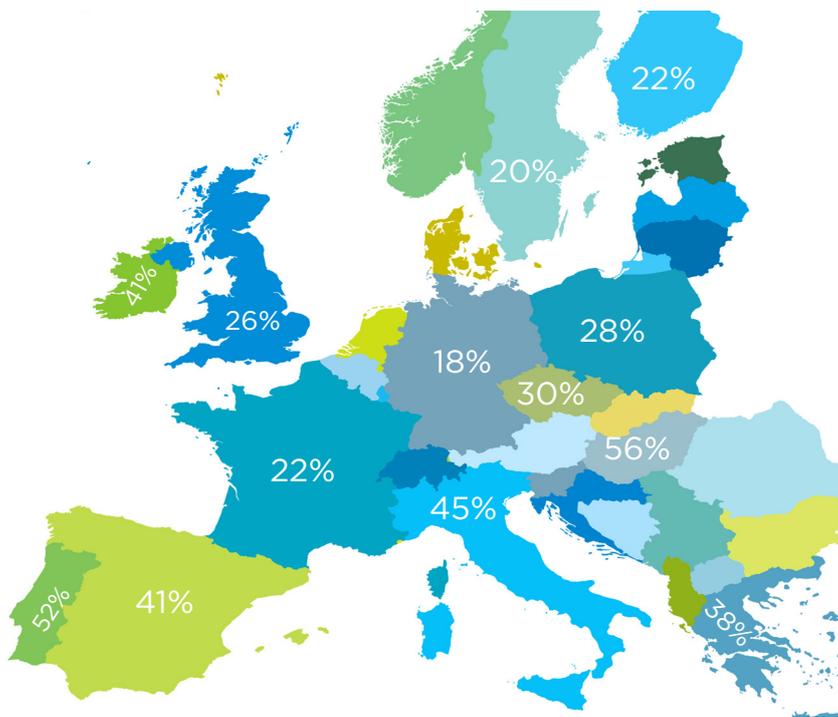


Consumers were asked about the extent to which having this information available to them, and the option of managing their privacy preferences, would make them more or less favourable about the concept of Online Behavioural Advertising:



#### More favourable towards OBA as a result of the Programme

All countries saw an increase in favourability for the concept of OBA through the European Self-Regulatory Programme, with potential for a significant impact in some countries such as Ireland (59%), Portugal (56%), Bulgaria (55%) and Greece and Italy (47%).



## Increase in trust towards brand being advertised

Respondents were then asked what impact the option of managing their privacy preferences had on their levels of trust in the brand being advertised.

Again the results show the potential power of the Programme to increase the level of trust in the brand being advertised with the greatest potential impact in Bulgaria (56%), Portugal (52%) and Italy (45%).

The European Advertising Consumer Research Report 2015 is the second edition of research to measure consumer recognition and perceptions of the European Self-Regulatory Programme on OBA across a wide range of European markets. As such, it builds on the benchmark results from the 2014 study, and provides real insight on the progress of the Self-Regulatory Programme and its continued development.

The EDAA and TRUSTe consider that the results of the study point to the following conclusions:

### 1. Recognition of the OBA Icon continues to rise and the Admarker clearly helps!

Where tracking data is available, recognition of the OBA Icon with Admarker has increased in the vast majority of markets. Great Britain has seen year on year increases (from 13% in 2012 to 28% in 2015). Recognition is highest in Portugal, Greece, Ireland, Great Britain and Hungary, with Portugal leading the way at 40%. The largest shifts in recognition between 2014 and 2015 occurred in Portugal and Hungary. Overall, and for the second year running, the study highlights the importance of the Icon's accompanying text (e.g. "AdChoices" in the UK), with levels of recognition increasing, in some cases significantly, for 10 markets (and remaining constant for the other 3) when consumers are served the explanatory text.

### 2. Consumers actively engage with the OBA Icon and want to learn more

The results highlight that at least 1 in 4 consumers say they have clicked on the Icon in 10 of the markets surveyed. This indicates that consumers are actively engaging with the Icon and want to learn more. The OBA Icon is providing consumers with notice about OBA and is clear, visible and contextual. The Icon plays an essential role in guiding consumers to a central website, [www.youronlinechoices.eu](http://www.youronlinechoices.eu), which in 2015 (Jan-Nov) has received an average of 2.9 million monthly visits – a significant increase from the average (1.7 million) across 2014.

### 3. Consumer understanding of the initiative is improving over time

The results show an encouraging level of understanding of the Self-Regulatory Programme, with consumers in 11 of 13 (85%) countries correctly identifying the meaning of the OBA Icon in their top two choices, compared to 4 of 10 (40%) countries in 2014. There is nevertheless room for improvement, with this research identifying those markets where more industry effort is needed to educate consumers. The EDAA is committed to constantly improving consumer-facing information through a pan-European online portal, [www.youronlinechoices.eu](http://www.youronlinechoices.eu),

now available in 33 markets and 27 languages, whilst companies also have a key role to be open and clear with their consumers regarding their OBA practices. This research also considered for the first time the impact of ad blocking – its growing prevalence leads into the need for further research into consumer perceptions of the value of advertising more broadly, and its contribution to the provision on online content and services. EDAA is committed to actively support this area of research in the near future.

#### **4. EDAA's Consumer Awareness Campaign is essential for promoting consumer empowerment**

Impressively, the largest shifts in recognition of the OBA Icon and Admarker between 2014 and 2015 occurred in Portugal (up 16% to 40%) and Hungary (up 11% to 27%). In addition to France and Germany, two markets each showing increases of their own, this accounts for all markets where a consumer awareness campaign has run in the period between the 2014 and 2015 research reports. It will be interesting in future iterations of the research to assess the lasting impact of a campaign and distinguish this from the clear immediate boost that an awareness campaign provides.

#### **5. Consumers want relevant advertising, with meaningful choice and control**

When presented with the Self-Regulatory Programme it becomes clear that favourability towards OBA increases dramatically, up to 59% in Ireland. It is clear that consumers, when given clear choice and control mechanisms, are more inclined to favour OBA. Relevance is important; so too is choice and control.

#### **6. Investment in the European Self-Regulatory Programme showing increasing benefit for businesses**

One standout aspect of these results is the potential for favourability amongst consumers to increase dramatically, not only towards the concept of OBA as highlighted above, but importantly also in terms of trust in the brand being advertised. Potential for increased trust in the brand is significant across all markets, and especially so in Bulgaria and Portugal, where over 1 in 2 consumers say they would trust the brand more if presented with the transparency and choice mechanisms through the Self-Regulatory Programme. As building a trusted relationship between consumers and brands is essential to advertisers, these indicators should have an important weight attached to them for those on the buy-side of the ad chain. It is clear that OBA Self-Regulation can provide significant benefit for your business, but in online advertising this means ensuring your entire supply chain complies with the industry standards. This should be a key consideration in business discussions moving forward, and in European markets companies should look out for the EDAA Trust Seal – a symbol that a company's OBA practices have been independently verified for compliance with the Programme.

## ABOUT TRUSTE

TRUSTe powers privacy compliance and trust by enabling businesses to use data across their customer, employee and vendor channels. We have nearly 20 years experience and a team of over 150 professionals dedicated to providing data privacy management solutions and services, including assessments, certifications and our SaaS-based Platform. The Data Privacy Management Platform provides control over all phases of privacy; from conducting assessments and implementing compliance controls to managing ongoing monitoring. Companies worldwide rely on TRUSTe to minimize compliance risk and protect their brand. See <http://www.truste.com>

## ABOUT THE EDAA

The European Interactive Digital Advertising Alliance (EDAA) is a non-profit organisation based in Brussels and is responsible for enacting key aspects of the Self-Regulatory Programme for Online Behavioural Advertising (OBA) across Europe since its launch in October 2012. EDAA principally acts as the central licensing body for the OBA Icon and provides technical means for consumers to exercise transparency and control over OBA through the [youronlinechoices.eu](http://youronlinechoices.eu) online consumer choice platform. EDAA is governed by EU-level organisations which make up the value chain of OBA within Europe and acts to ensure European consistency in approach. More information can be found at [www.edaa.eu](http://www.edaa.eu)