How EU citizens perceive Digital Advertising since GDPR

Caroline Wren, MTM
Research objectives and approach

EDAA survey conducted by MTM in March 2019 with 5,000 internet users equally spread across France, Germany, Poland, Spain & the UK, to:

- Assess consumer understanding and expectations around online privacy and Online Behavioural Advertising (OBA)
- Assess consumer awareness, perceptions and understanding of GDPR, as well as the impact of its introduction
- Measure the extent of consumer appetite for further information and control over data-driven advertising
Consumers have an awareness of the introduction of GDPR

- 76% Are aware of GDPR
- 35% Have some understanding of GDPR
- 30% Know a bit about it
- 24% Know a lot about it
- 11% Aware of, but don't know about
- 46% Not aware of it

EDAA Summit 2019
Familiarity varies by market

EDAA Summit 2019

Aware of GDPR

Have some understanding of GDPR

Less familiar

More familiar

France: 70% Aware, 36% Have some understanding
Spain: 74% Aware, 41% Have some understanding
UK: 73% Aware, 46% Have some understanding
Germany: 78% Aware, 52% Have some understanding
Poland: 85% Aware, 56% Have some understanding
Since GDPR, many consumers feel more knowledgeable about online data.

40% agree:

“Over the past year, I feel more knowledgeable about the way in which information about me is collected and used online.”
Understanding of GDPR relates to better knowledge of online data use

% agree they feel more knowledgeable about online data

Not aware: 34%
Aware, but know nothing about: 36%
Aware, and know a bit about: 42%
Aware, and know a lot about: 54%

Understanding of GDPR
Consumers are more comfortable now, with online behavioural advertising (OBA).

% agree “I feel more …”

- Not aware: 34%, 28%
- Aware, but know nothing about: 36%, 28%
- Aware, and know a bit about: 42%, 25%
- Aware, and know a lot about: 54%, 39%

Knowledgeable about online data
Comfortable sharing data
Comfortable with OBA

Understanding of GDPR
Many consumers have some knowledge of how data is used for advertising

- 97% Are aware that data is used for online advertising
- 62% Have some understanding of how it works
- 28% I understand it very well
- 29% I have a reasonable understanding
- 6% I'm aware of it, but I'm unsure how it works
- 3% I'm aware of it, but I've never really thought about it
- 3% I wasn't aware of it before today
Most consumers wish to know more

72% agree:

“I’d like to know more about how information about me is used online”
Even though it is discreetly placed, one third have used the AdChoices Icon.

**AdChoices icon**

**Use of icon to control privacy**

- Use often: 22%
- Use occasionally: 11%
- NET use: $+33\%$
Understanding of the use of data for online advertising varies by age

% who understand data use for online advertising

18-24: 74%
25-34: 78%
35-44: 73%
45-54: 60%
55-64: 51%
65+: 45%

Age of internet users

EDAA Summit 2019
Understanding also varies by market

% who understand data use for online advertising

- Poland: 68%
- France: 64%
- United Kingdom: 62%
- Germany: 60%
- Spain: 56%
I feel I have **easy access to explanations** as to how advertising companies collect and use information about me.

I am **happy for some information about me to be collected** in order to access specific online websites and services.

My online experience is **improved by having advertising that is tailored** to me.

I'd **rather have ads tailored to my interests** than general ads that don’t relate to me.

<table>
<thead>
<tr>
<th>Statement</th>
<th>haven't used the icon / portal</th>
<th>have used the icon / portal</th>
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</thead>
<tbody>
<tr>
<td>I feel I have easy access to explanations as to how</td>
<td>21%</td>
<td>53%</td>
</tr>
<tr>
<td>advertising companies collect and use information about</td>
<td></td>
<td></td>
</tr>
<tr>
<td>me</td>
<td>+32%</td>
<td></td>
</tr>
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<td>27%</td>
<td>53%</td>
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<td>in order to access specific online websites and services</td>
<td>+26%</td>
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<tr>
<td>My online experience is improved by having advertising</td>
<td>21%</td>
<td>51%</td>
</tr>
<tr>
<td>that is tailored to me</td>
<td>+30%</td>
<td></td>
</tr>
<tr>
<td>I'd rather have ads tailored to my interests than</td>
<td>38%</td>
<td>59%</td>
</tr>
<tr>
<td>general ads that don’t relate to me</td>
<td>+21%</td>
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It would be beneficial if the programme could attract those less aware

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Have used the icon / portal: 45% (16% increase)

Haven’t used the icon / portal: 36%
Conclusions

1. Improving consumer awareness and understanding of online data usage and addressing misconceptions can increase positive thinking towards online behavioural advertising.

2. Improving consumer trust in how their data is used can support positive perceptions and encourage openness from consumers.

3. Providing consumers with increased transparency over their online data is business-critical, and EDAA can help improve this further.