

# Europe online: an experience driven by advertising

September 2017



# Project Research Scope



Consistent approach in all markets: quantitative research to obtain a rich understanding of attitudes towards online advertising and privacy

## 1 Quantitative interviews

c.1,000 online interviews per market  
10 minutes interviews

## 2 Target

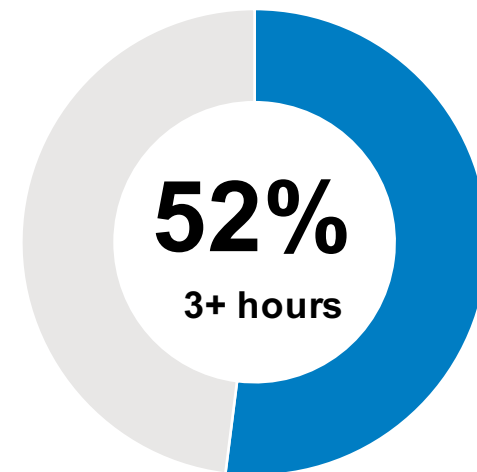
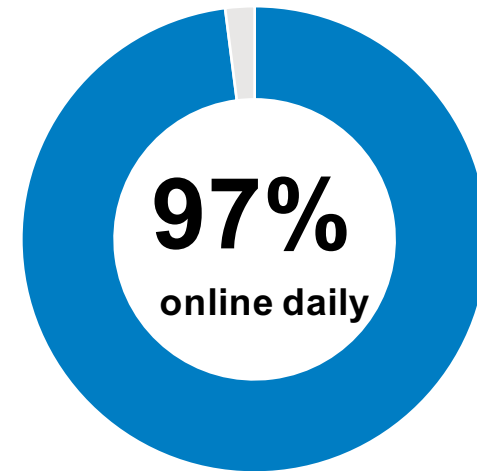
Internet users 16+ years old in 11 European countries:  
UK, DE, FR, NL, IT, PL, CZ, HU, RO, SK, EE

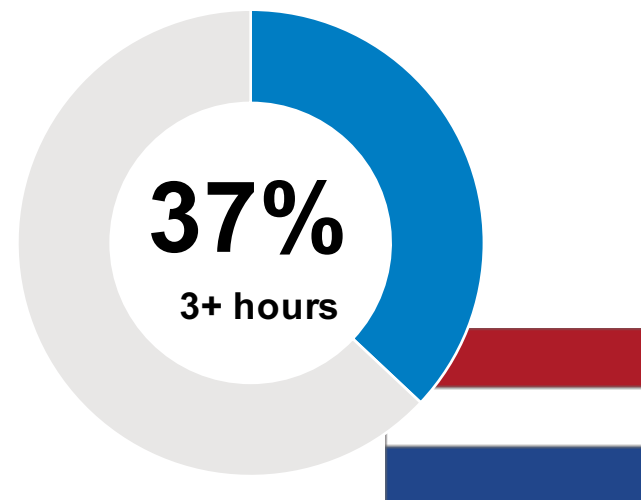
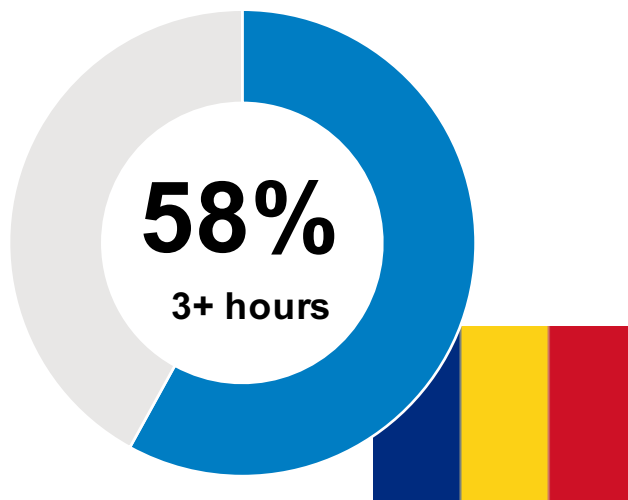
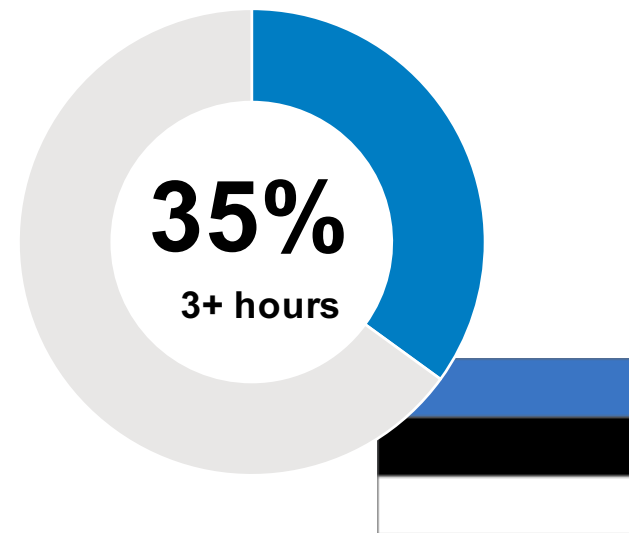
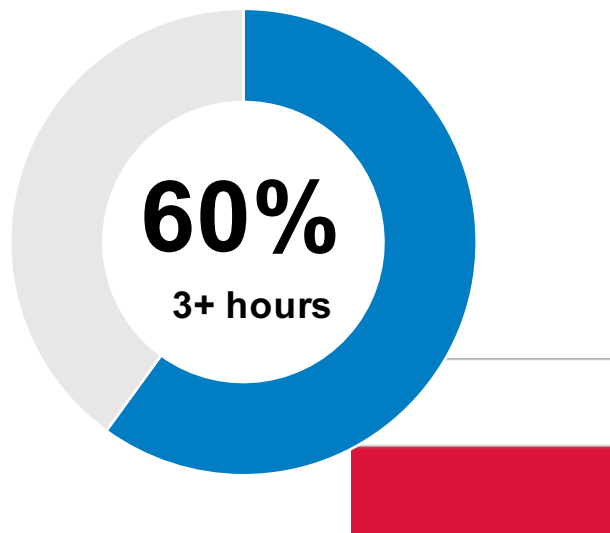
## 3 Timing

Interviews conducted during July 2017

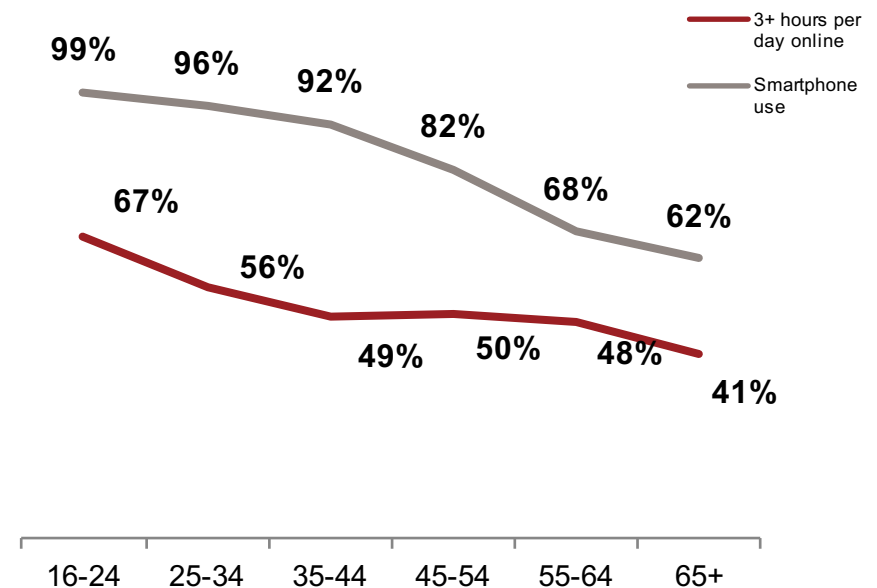


Most European internet users are online daily, using a variety of devices and engaging in a diverse array of activities

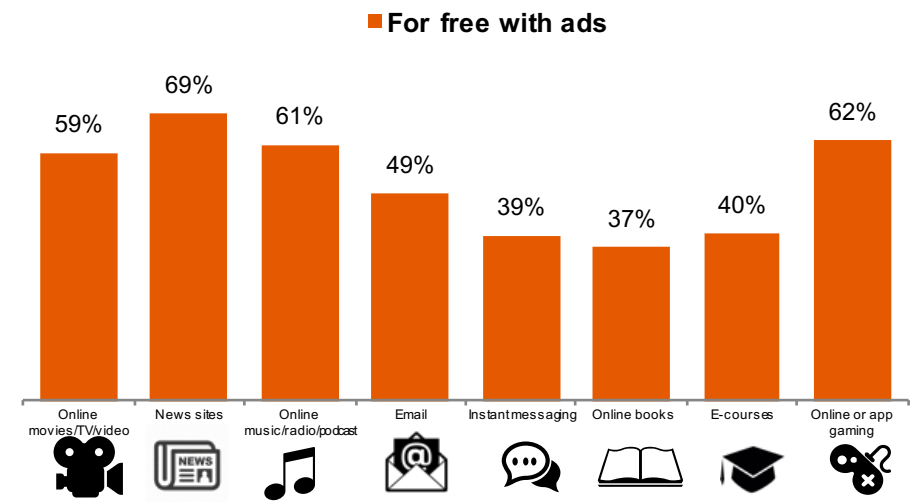


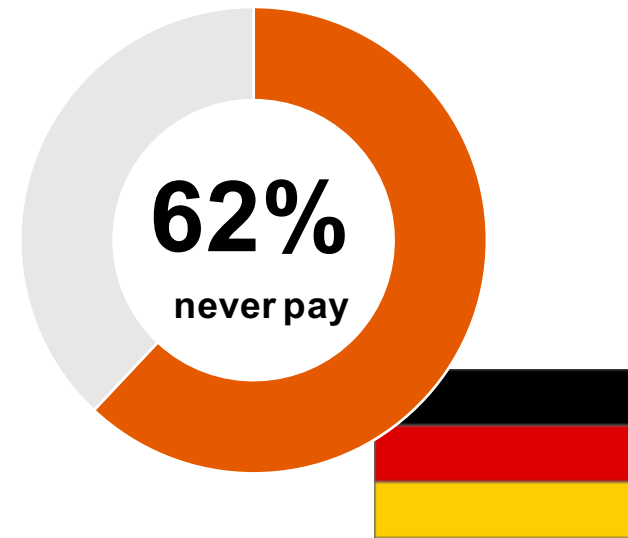
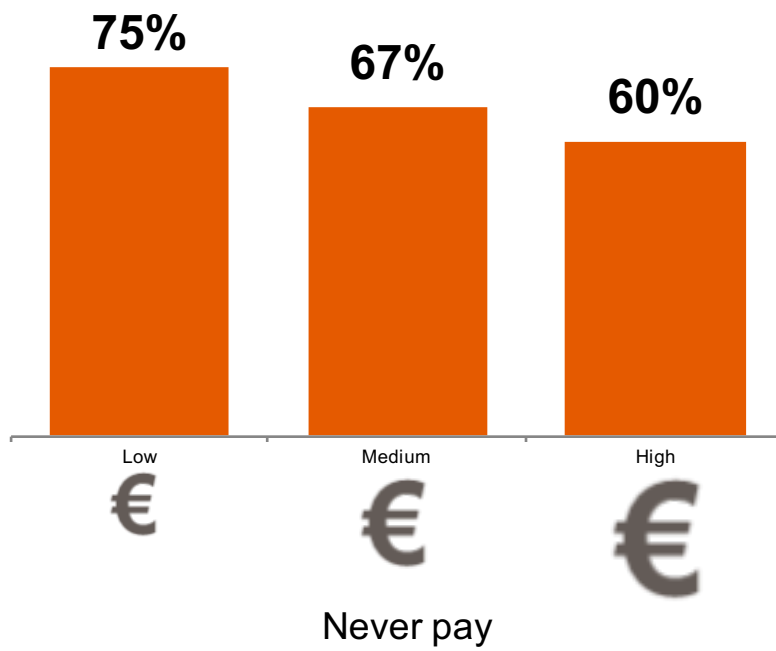


Younger users are more likely to be online more frequently and to use smartphones than older internet users

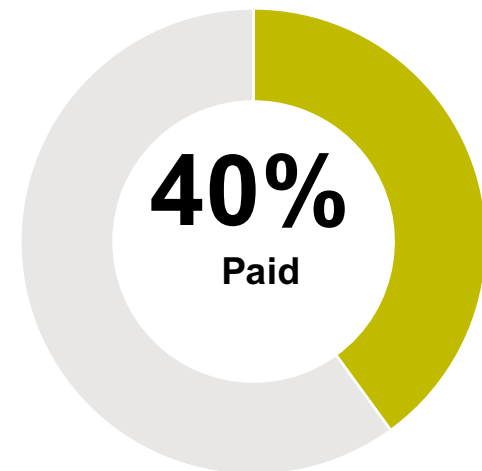
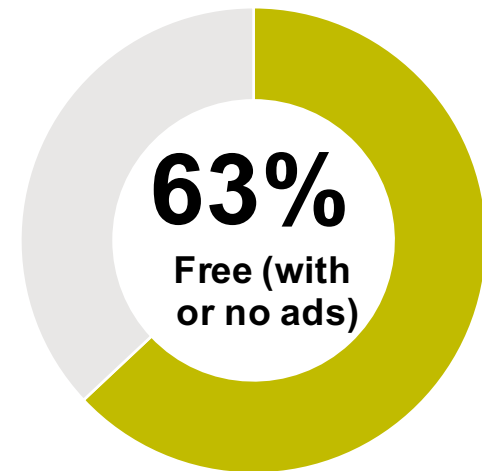


The European online experience is essentially free and ad-supported, with two-thirds of users never paying for services or content

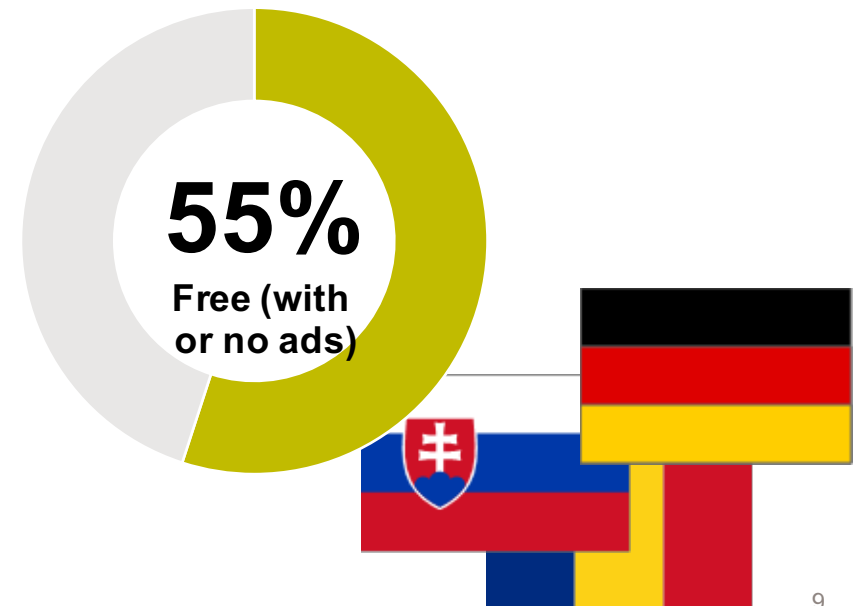
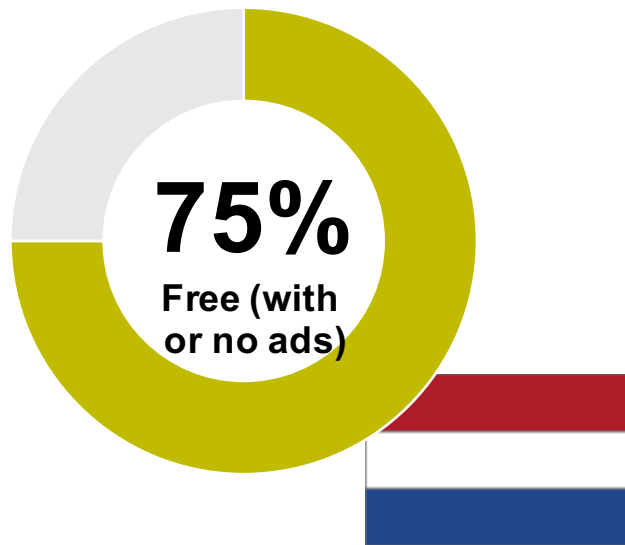
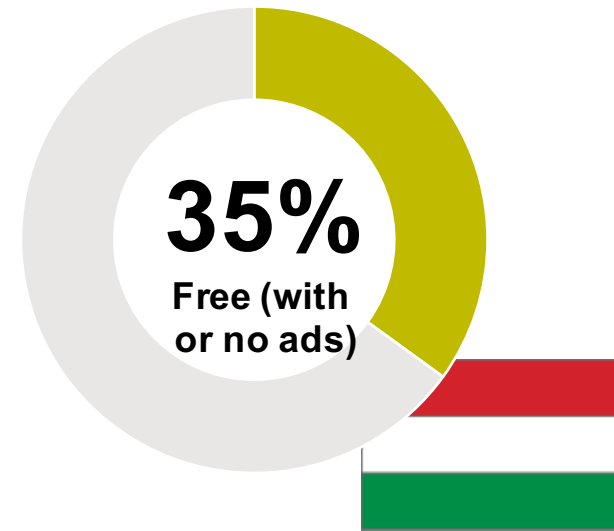
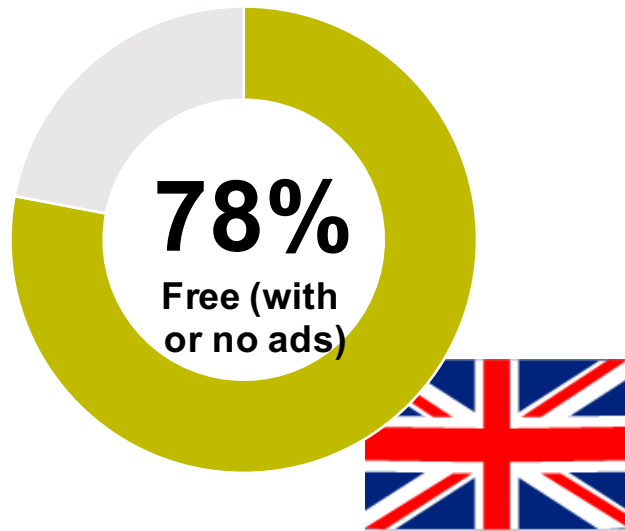




Online users are more satisfied with their free (with or without ads) than their paid online experiences



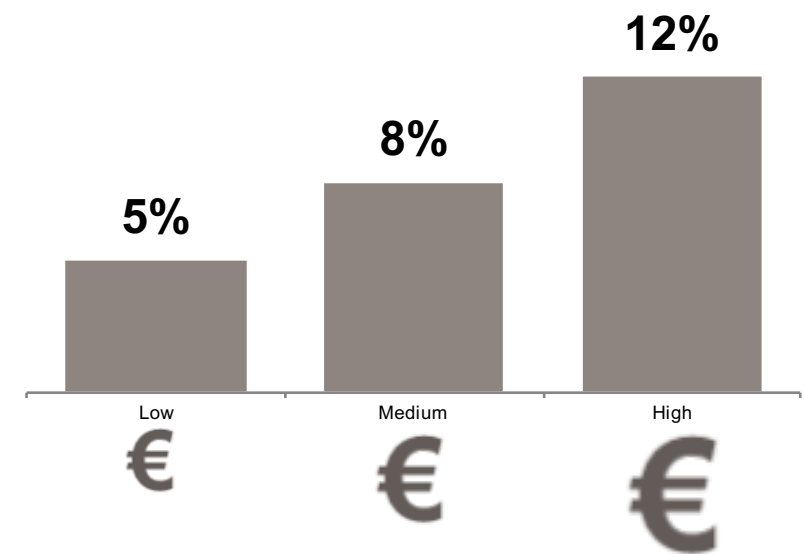




Online users would avoid paying for services or content – most would stop accessing their most used free site/app (with or without ads) if it became paid for



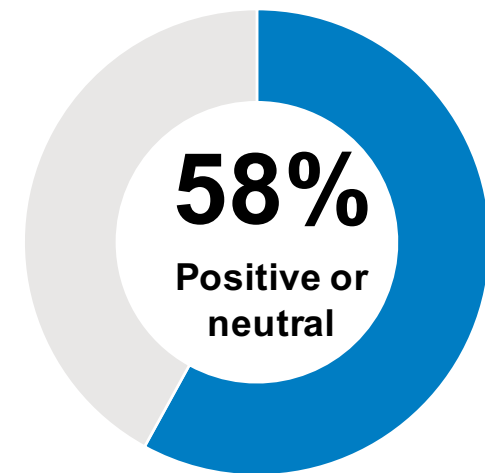
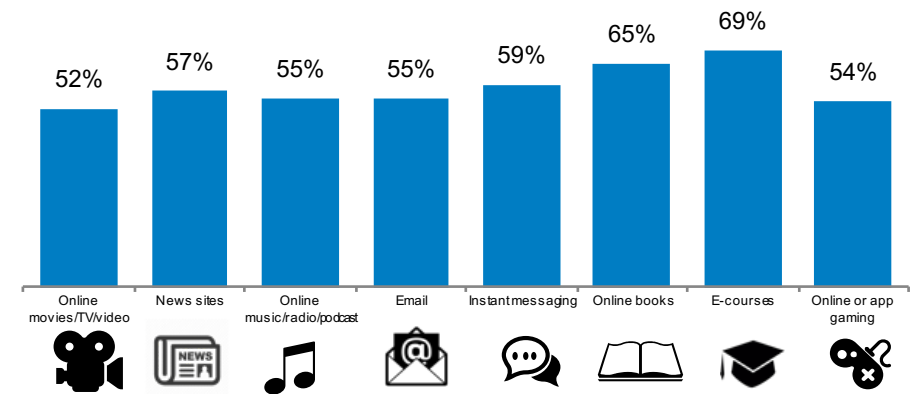
Those on higher incomes are more than twice as likely to pay in order to keep accessing their most used site than those on lower incomes

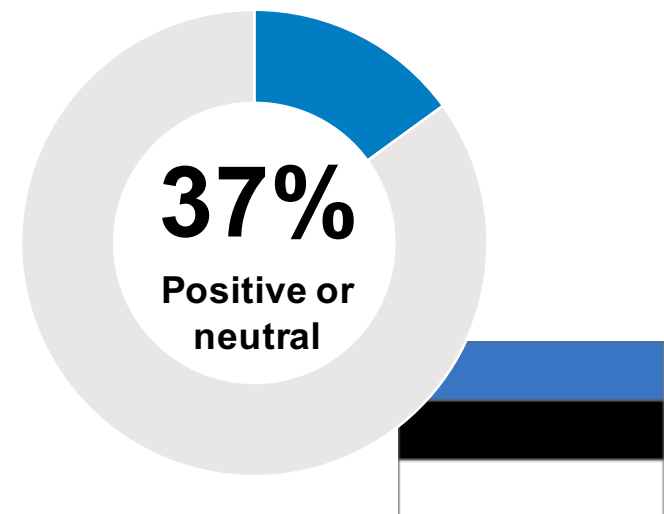
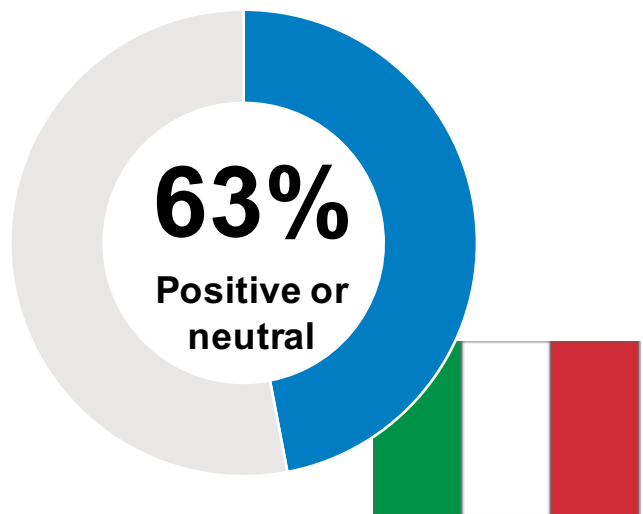
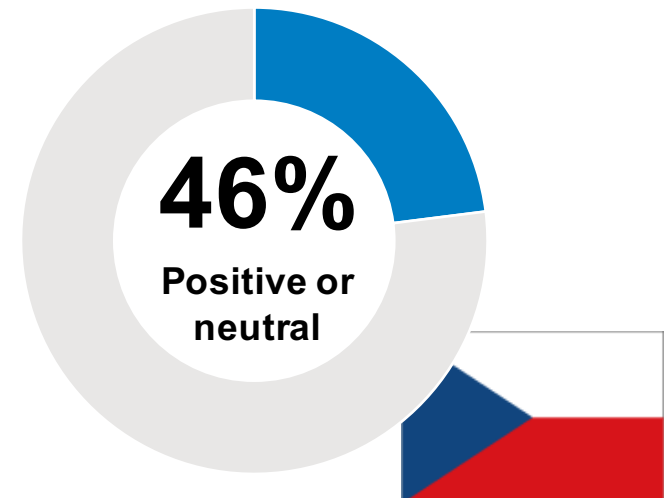
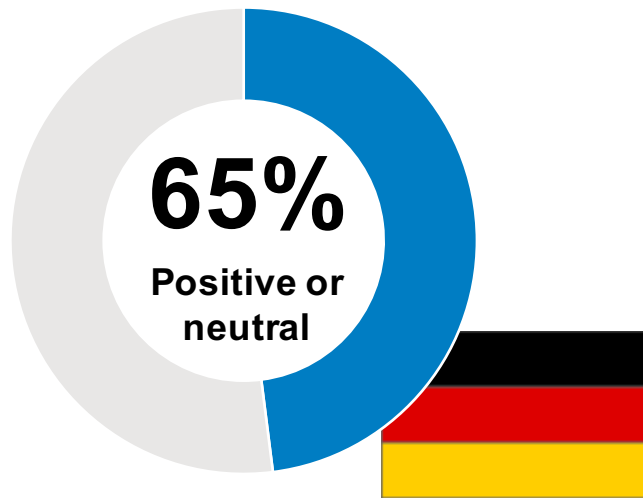


European online users are generally positive or neutral about online advertising



■ Positive or neutral about online ads





European online users are happy for their data to be accessed in order to get access to free content supported by advertising



I prefer to pay for news, content and services to keep my browsing data private

I prefer free news, content and services allowing my browsing data to be accessed



I prefer paid-for news, content and services without advertising

I prefer free news, content and services with advertising



## Approach 1

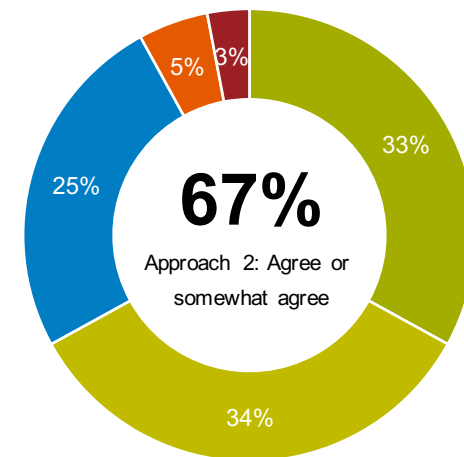
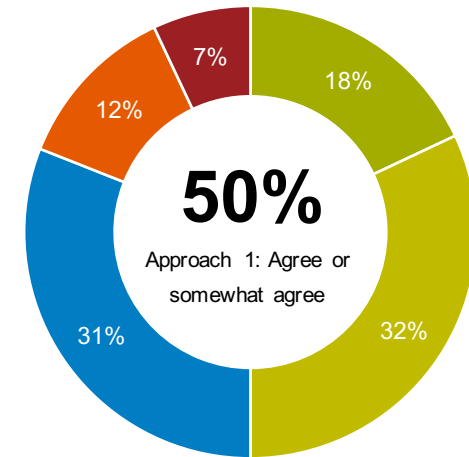
“I would like to be able to approve or disapprove the use of my browsing data for advertising every time I use a site or app, even if this would mean that I have to give consent every time before being able to access the site or app”



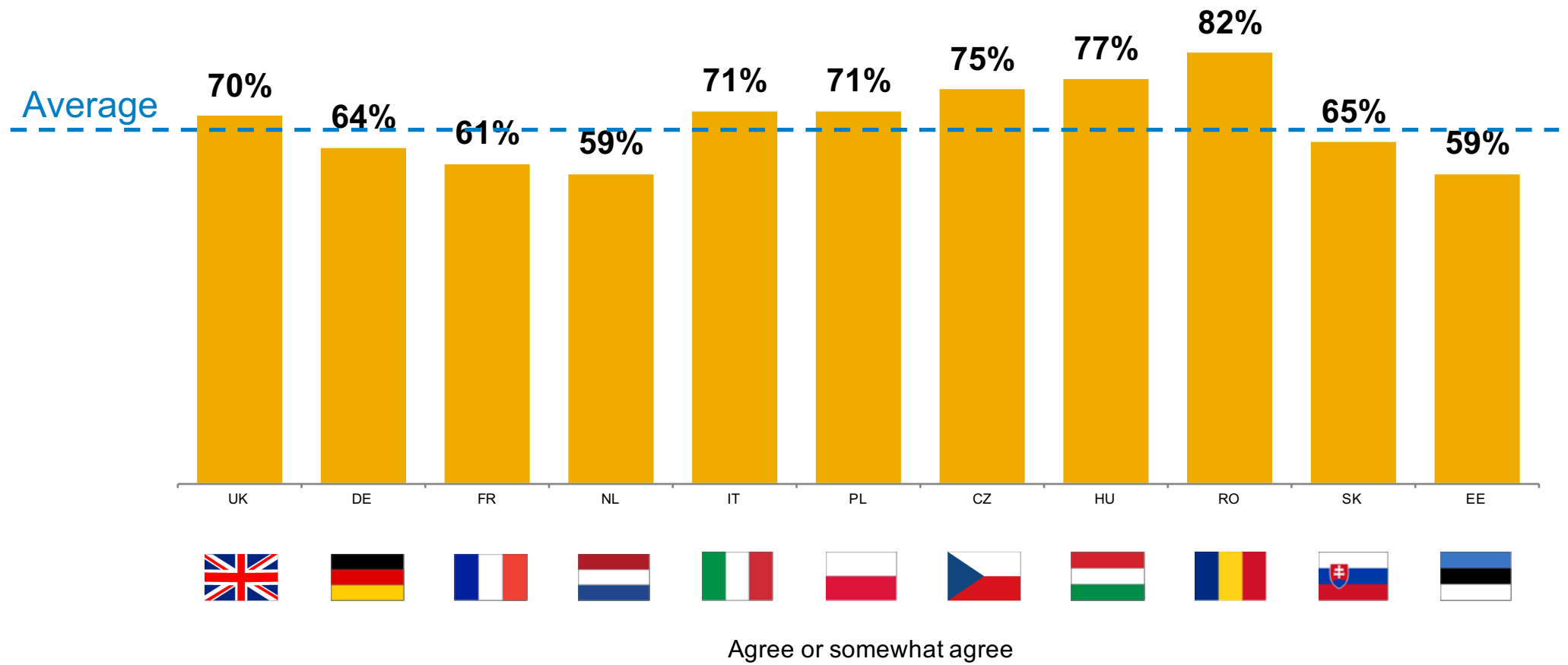
## Approach 2

“I would like to be able, with a couple of clicks, to obtain detailed information about how my browsing data is used on advertising, including the reasons I see a particular ad and who is accessing my browsing data, as well as to be in control of this process and being able to regulate or stop the use of my data”

Online users have more interest in being able to access information about their data use than in requiring the approval of cookie data every time they access a site







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# Methodology (1)



- The study was commissioned by IAB Europe and EDAA and was conducted online using a 10 minute survey instrument consisting mainly in closed questions during 2017.
- Eleven countries were covered (see table below) and 1,000 or more interviews were completed on each. The target respondent was online users 16 or more years old.

Country	Sample
UK	1001
DE	1000
FR	1000
NL	1000
IT	1001
PL	1000
CZ	1001
HU	1001
RO	1000
SK	1000
EE	1016
TOTAL	11,020

- Geo-demographic quotas (region, age, gender) were used during fieldwork to ensure a fair representation of the online population of each country.
- The results were weighted to be representative of region, age and gender by country, and then merged together taking into consideration their respective online population size (see table below)

Country	Online population (millions)
UK	59.5
DE	70.6
FR	54.5
NL	15.8
IT	39.2
PL	26.3
CZ	8.6
HU	7.2
RO	10.8
SK	4.6
EE	1.2

## Methodology (2)

To define income categories, we looked at the income distribution in each country and split roughly it in thirds – low, medium and high, then aggregated these three categories across countries.

Country	Currency	Income classification LOW	Income classification MEDIUM	Income classification HIGH
UK *	Pound Sterling	up to 15,499	15,500 -34,999	35000 or more
DE	Euro	up to 2500	2500 - 3999	4000 or more
FR	Euro	up to 1999	2000-3499	3500 or more
NL	Euro	up to 1999	2000-3499	3500 or more
IT	Euro	up to 1499	1500 - 2499	2500 or more
PL	Zloty	up to 2999	3000 - 5999	6000 or more
CZ	Koruna	up to 25000	25001 - 40000	40001 or more
HU	Forint	up to 200000	200001 - 350000	350001 or more
RO	Leu	up to 2500	2501 - 4000	4001 or more
SK	Euro	up to 999	1000 - 1999	2000 or more
EE	Euro	*incomes are monthly income before taxes, except in the UK, where it's annual income up to 999	1000 - 1999	2000 or more

All work was conducted in accordance with the ISO 9001 quality assurance standard, the ISO 20252 international standard for Market, Opinion and Social Research and in accordance with the UK Market Research Society's Code of Conduct.