Audiences and cookie consent preferences

Whitepaper

optout

How many people click 'refuse all cookies' when they have the chance?

And, more importantly …

Who are they?

Two questions that matter in an era where online privacy is at stake. Questions that, as long as there's no answer, result in assumptions and choices based on 'gut feeling'.

Publishers (websites/apps that display advertisements) and advertisers face the challenge of remaining relevant and competitive without violating consumer privacy.

And therefore, it is essential to answer these questions properly.

Opt Out Advertising engaged research agency Motivaction to investigate how people (aged 18-75) respond to consent management platforms (also known as cookie-pop-ups).

In total, **1035 respondents completed the survey.**

Summary of results

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The type of publisher makes a difference when it comes to accepting or refusing cookies and tracking: for news outlets and lifestyle platforms it's most likely that visitors refuse cookies and tracking.

In recent years, people have become more aware of the importance of privacy, yet they are moderately positive about the actions companies take.

Consciously dealing with cookies is common in all age groups. If we look at demographics, people who refuse to share their data are often highly educated and have an above-average income. They are often interested in sustainability, politics and economics.

A much smaller group (54% of respondents) is very privacy-aware and refuses cookies or changes settings.

When it comes to cookies, people choosing 'accept all', say convenience is the most important reason for doing so.

84% of people believe refusing cookies should always be equally as easy as accepting them.

70% of people regularly doubts whether accepting all cookies is wise.

When no 'refuse all'-button is offered, 27% chooses to refuse cookies by changing the settings.

When a 'refuse all'-button is offered, **30% of respondents** choose this option.

Another 11% say they choose to refuse cookies via settings.
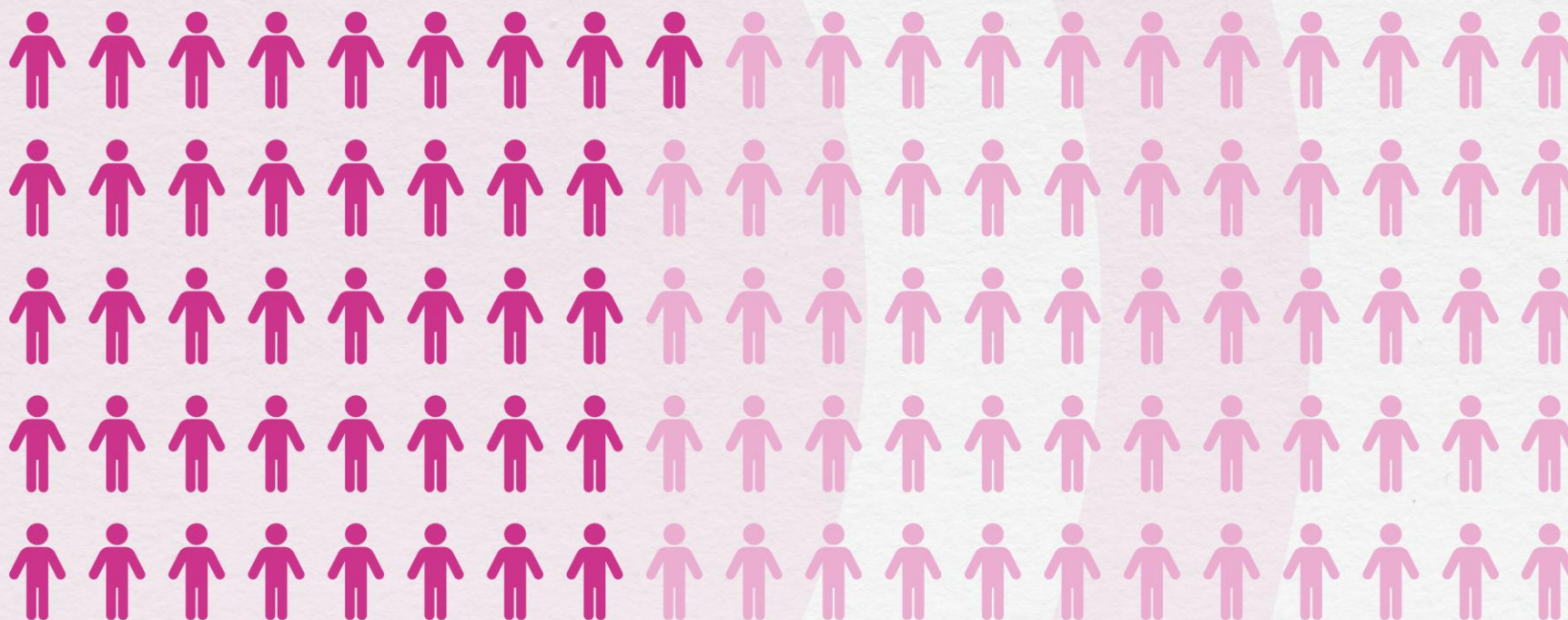
That means a **total of 41%** refuses cookies and tracking.

Importance of privacy

When respondents were faced with a statement about the importance of privacy, **75%** agrees with the statement that they have **become more aware** in recent years. They also worry more about it than five years ago

Over half (**54%**) of the respondents see the future of their privacy as **bleak and uncertain.**

Groups that are more privacy-conscious predominantly live in urban areas, are **higher educated** and have an **above-average income**.

Only **43%** of respondents agrees with the statement that **companies have started taking their privacy more seriously**, despite the legal rules in the Netherlands that officially oblige them to do so.

Precautions people take

Increased privacy awareness has led to many respondents being able to take measures to protect themselves online. Using strong passwords (79%) and only visiting websites with secure connections (68%) have become common practice for most people.

However, being conscious (or refusing) tracking and cookies is not common practice. Just over half of respondents (54%) are conscious about accepting tracking and cookies.

23% of respondents read companies' privacy statements.

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Decisions about cookies & tracking

Most respondents (60%) say they spend less than 2 seconds on the choice of whether to accept cookies. They quickly choose to accept or reject everything. The most frequently cited reason for accepting cookies is that the current 'accept all'-button is simply the fastest and the easiest option to continue.

Respondents were shown two scenarios of a cookie consent module (as shown on the right).

When the scenario without the 'refuse all'-button was presented, 58% of respondents say they choose to accept all cookies and 27% of respondents say they would choose to change the settings.

When the scenario with the 'refuse all'-button was presented, 47% say they would accept all cookies. In this case, 30% would choose to refuse all cookies, 11% say they would change the settings (indirectly, they refuse cookies too - so the total percentage of people refusing cookies in this scenario is 41%).

Option 1

Your privacy-settings

This website collects information about your device, location, browser, and browsing behavior using cookies.

We use these cookies to analyze the usage of our sites and apps and to show you relevant advertisements. Our 346 advertising partners use cookies to display personalized ads, conduct ad measurement and audience research, and develop their services. Some partners may also use your precise geolocation to select ads for you, but only if you give your consent.

By clicking "Accept all cookies", you agree to the placement of all cookies on your device. You can also set your preferences by clicking "Manage settings".

[Accept all cookies]   [Manage settings]

Option 2

Your privacy-settings

This website collects information about your device, location, browser, and browsing behavior using cookies.

We use these cookies to analyze the usage of our sites and apps and to show you relevant advertisements. Our 346 advertising partners use cookies to display personalized ads, conduct ad measurement and audience research, and develop their services. Some partners may also use your precise geolocation to select ads for you, but only if you give your consent.

By clicking "Accept all cookies", you agree to the placement of all cookies on your device. If you click "Reject all cookies", only essential cookies will be placed on your device. You can also set your preferences by clicking "Manage settings".

[Accept all cookies]   [Reject all cookies]   [Manage settings]

Decisions about cookies & tracking

optout

58%
47%

30%

27%
11%

Accept all cookies

Reject all cookies

Manage settings

● Option 1
Manage settings

● Option 2
Including 'Reject-all' button
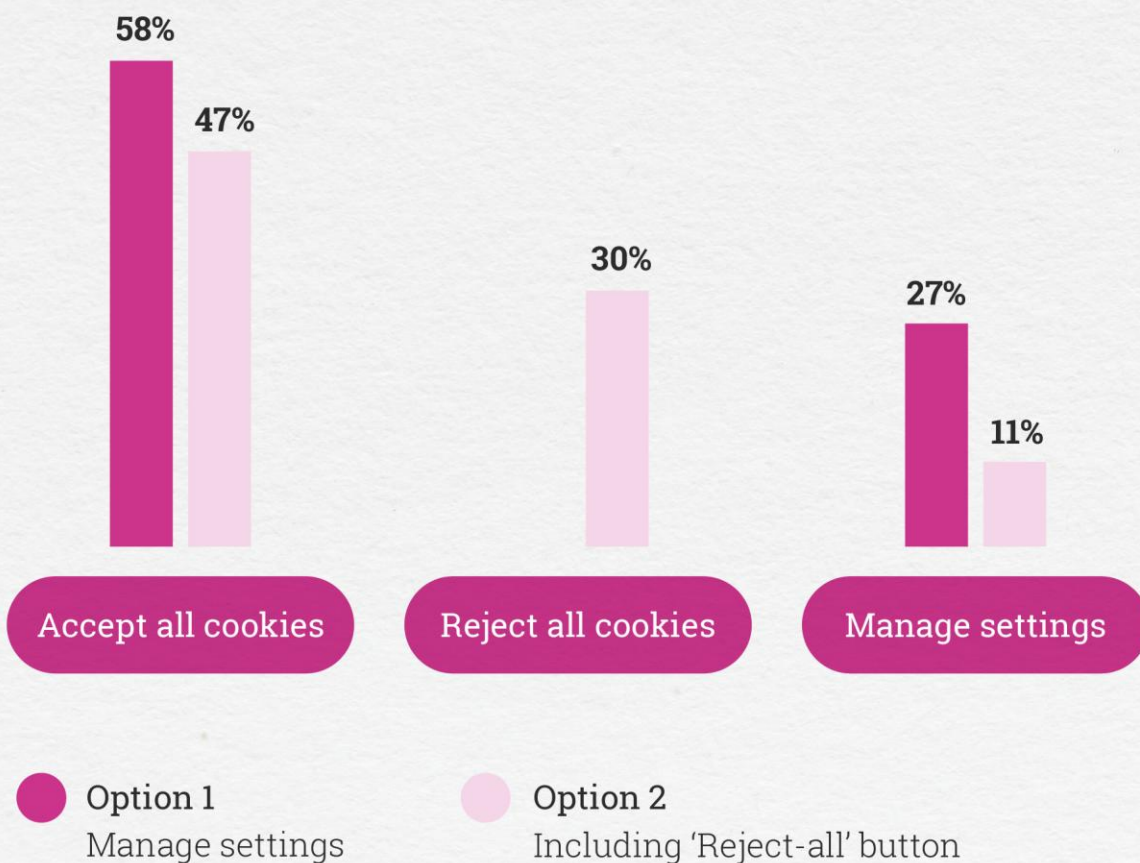
People who choose to refuse all cookies (**30%**), are clear and outspoken about their reasons for doing so:

they'd rather not be tracked or have their data shared and if there's a 'refuse-all'-button, it's easy to prevent that.

Effects of a 'refuse-all'-button

A set of stricter EU-laws and -regulations that has been implemented since 2018 and make it mandatory to have a 'refuse all'-button in the first layer of cookie and tracking prompts. It has to be equally easy to refuse as it is to accept.

However, this doesn't mean that all organisations do this. Last year, many companies have been fined because they didn't meet the legal requirements. Others have been warned with a fine, which is why you now see more and more publishers implementing a 'refuse all'-button.

What is the effect of having a 'refuse-all'-button in cookie and tracking prompts? Does it improve the respondents' opinion about a website or app? For 34% of them, it does. When they can choose to refuse, they believe their data is being handled with care.

If we only look at the respondents who always refuse cookies (even if they have to change the settings themselves), the percentage of them that feels this positive sentiment is 45%.

A 'Refuse-all'-button has a positive effect on user's trust;

when they can choose to refuse, they believe their data is being handled with care.

Differences per type of organisation

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When asking people what choice they make when they're presented a general cookie prompt, **41% refuse to share their data**. Good to know, right? But to what extent does this percentage change when we ask people about their choices per specific type of domain/organisation asking for permission to track them?

Whether or not respondents accept or refuse cookies, varies per organisation. Cookies are most commonly accepted on websites or apps run by governmental and financial institutions.

However, respondents are more reserved when it comes to accepting cookies and sharing their personal data on social media platforms (**54% refuse**), e-commerce websites (**52% refuse**) and news- and lifestyle domains (**both 51%**).

This means that for advertisers, **it's important to keep in mind that if they run a campaign on a lifestyle platform, only on the consented inventory they will miss out on 51% of their target audience.**

For publishers **it's interesting to look at consentless inventory in order to make the most of their (potential) advertising revenues.**
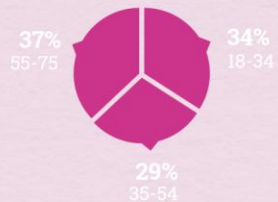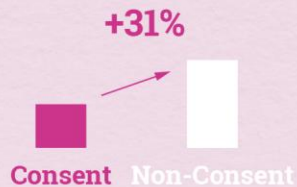
Social Media

54%

News

51%

Ecommerce

52%

Lifestyle

51%

Gender

55% Female   **45%** Male

High income

+16%

Age

37% 55-75   34% 18-34   29% 35-54

High education

+31%

Consent   Non-Consent

Who are the people that refuse cookies?

Accepting or refusing cookies is a matter of all levels of the population, but there are differences in profiles of those who refuse cookies and those who accept them.

People that are highly educated are represented 31% more strongly in the group that refuses cookies compared to people that accept them. When it comes to income, people with an above-average income are 16% more strongly represented in the non-consent group.

The survey also presented a number of topics, asking to what extent respondents are interested in them. Among those who refuse cookies, notable differences are that people are interested in sustainability and energy issues as well as economics & finance than those who accept cookies.

What all of this means for advertisers and publishers

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This survey shows that a substantial part of website and app users are already refusing cookies and tracking. Based on the outcomes of this survey, the share seems to vary between 25%+ (without a refuse all-button) and 40%+ (with a 'refuse all'-button). For certain specific domain types, such as social media, news outlets and lifestyle platforms, the numbers are even more serious: when offered the option, 50%+ refuses cookies and tracking.

There are significant differences between the groups that refuse and accept cookies based on characteristics. Higher educated people as well as those with an above-average income are more likely to refuse cookies than other groups - and make more of an effort to prevent being tracked.

If advertisers target these specific groups, it is extra relevant to also opt for techniques that doesn't require consent in order to optimise reach. However, this actually applies to any campaign, because the share of people refusing cookies is substantial in all groups - and it will only increase as the 'refuse all'-button gets introduced in more and more publishers' cookie and tracking prompts.

In short: if you want to reach a large (or specific) audience with your ads, looking at consentless inventory is essential.

Solutions for advertisers and publishers

Of course there's an easy solution that allows advertisers to **reach the full potential** of their target group. If you make sure you have inventory for both cookie-acceptors as well as cookie-refusers, you can't miss them.

With Opt Out Advertising's platform, we serve an exclusive audience with our specific inventory. This enables advertisers can reach their full target group and publishers can offer maximum inventory to advertisers.

However, we'd rather let our clients do the talking …

Solutions for advertisers and publishers

Moritz van der Burg, Programmatic Lead Benelux at MediaMarkt, says:

"As MediaMarkt we are always looking to extend our reach and drive high performing traffic to our website. In Opt Out Advertising we found the perfect partner to achieve this in a future-proof way. Opt Out Advertising offered us premium programmatic inventory that resulted in highly qualitative traffic. Compared to our usual cookie-based campaign with the same creatives, we achieved a significant increase in add-to-cart and transaction rates with the campaign executed by Opt Out Advertising."

Ross Wallace, Head of Performance at Pearson's media agency December19, says:

"With more and more students aware of their online privacy, Pearson jumped at the opportunity to reach students who did not want their data used for advertising but were still in market researching BTEC Higher Nationals, as an alternative to traditional university reading relevant articles on The Guardian and Telegraph. This gave us an opportunity to influence students that other BTEC Higher Nationals were not reaching."

Melda Rensink, Digital Media Marketeer at 'de Bijenkorf', says:

"With Opt Out's exclusive non-consent inventory, we have reached a new target group that is difficult to reach via regular, tracked targeting. The results show that we activated a new, qualitative target group with this future-proof approach. Non-consent inventory is becoming increasingly essential for any effective display strategy."

Interested to hear more about the options for your campaigns or platform?

Drop us a line at info@optoutadvertising.com or call us at +31(0)970 102 57057 - we're happy to tell you everything about unlocking consentless inventory.

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