



Internet
Advertising
Bureau
UK



Consumers & Online Privacy: 2012

- Background and objectives
- General attitudes to the internet
- Attitudes to online data and privacy
- Attitudes to advertising
- Control and the role of the AdChoices icon
- Conclusions



Background and objectives

ValueClick

The IAB and ValueClick commissioned independent research agency, Kantar Media to conduct an authoritative study on attitudes of UK internet users to online privacy and data

Objectives:

- General attitudes towards **online privacy** and **data**
- How internet users feel about privacy and the actions they take to **safeguard** themselves
- Opinions towards **online** advertising and **traditional** forms of **advertising**
- Extent to which people understand that **advertising** allows them to enjoy **free content**





Sample: Kantar Media interviewed a total of **2,001 internet users** across the UK aged 16+

Methodology:

Online: 1,361 interviews

via Kantar's LSR Online Panel



Face to face: 640 interviews

via Kantar's Omnibus



Survey: The same **eight minute survey** about online privacy was answered by all participants

Weighting: The **data was weighted by demographic** as well as weight of internet use to account for heavier internet usage among online panellists

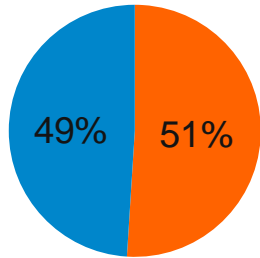


Sample is representative of UK internet users

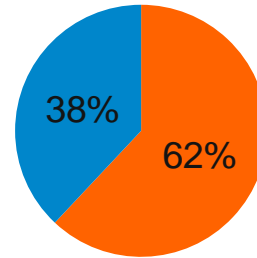


Total internet user population 38,588,000 among GB adults aged 16+

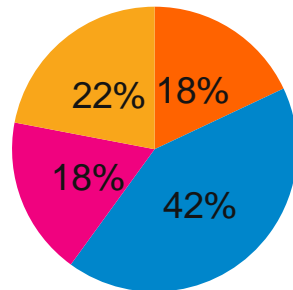
Male Female



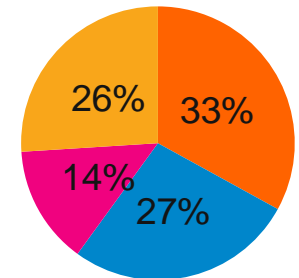
ABC1 C2DE



16-24 25-44
45-54 55+



North South
London Midlands



The sample for this research has been weighted to be representative of this profile



1: GENERAL ATTITUDES TOWARDS THE INTERNET

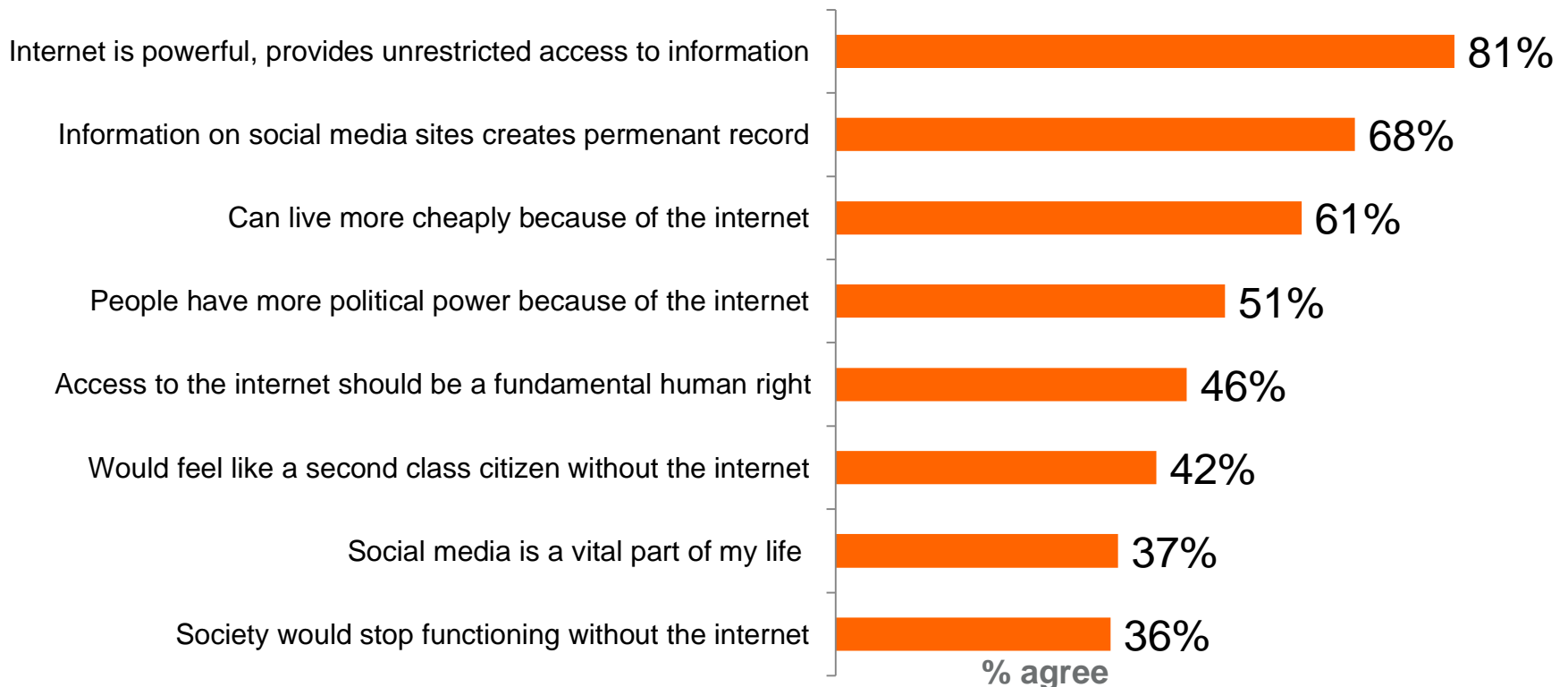


People believe *the internet is powerful*



The majority of those surveyed said that the internet is powerful because it **provides unrestricted access to information.**

The economic impact of the internet was also clear as people said that the **internet allows them to live more cost effectively**

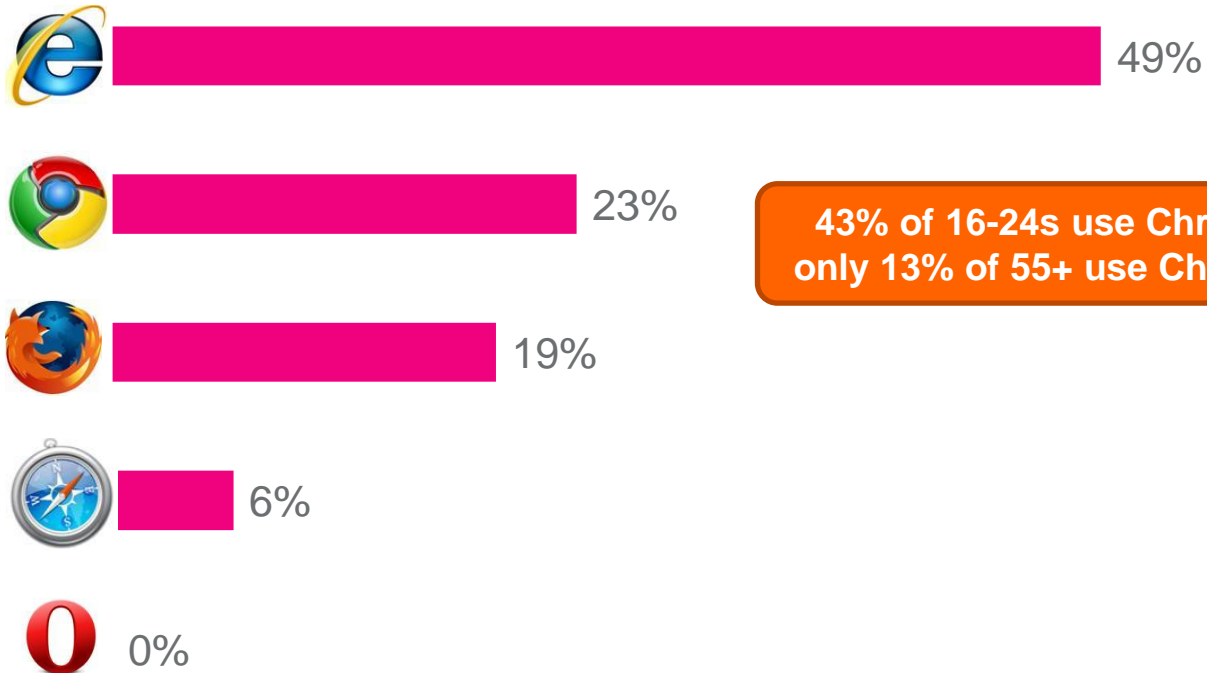


To what extent do you agree or disagree with the following statements?

Base: All Adult Internet Users in the last month (2011)



Internet Explorer the most popular browser



43% of 16-24s use Chrome most often; only 13% of 55+ use Chrome most often

A web browser is the main way you access the internet. Which of the following web browsers do you use most often when you go online?

Base: All Adult Internet Users in the last month (2011)



ValueClick

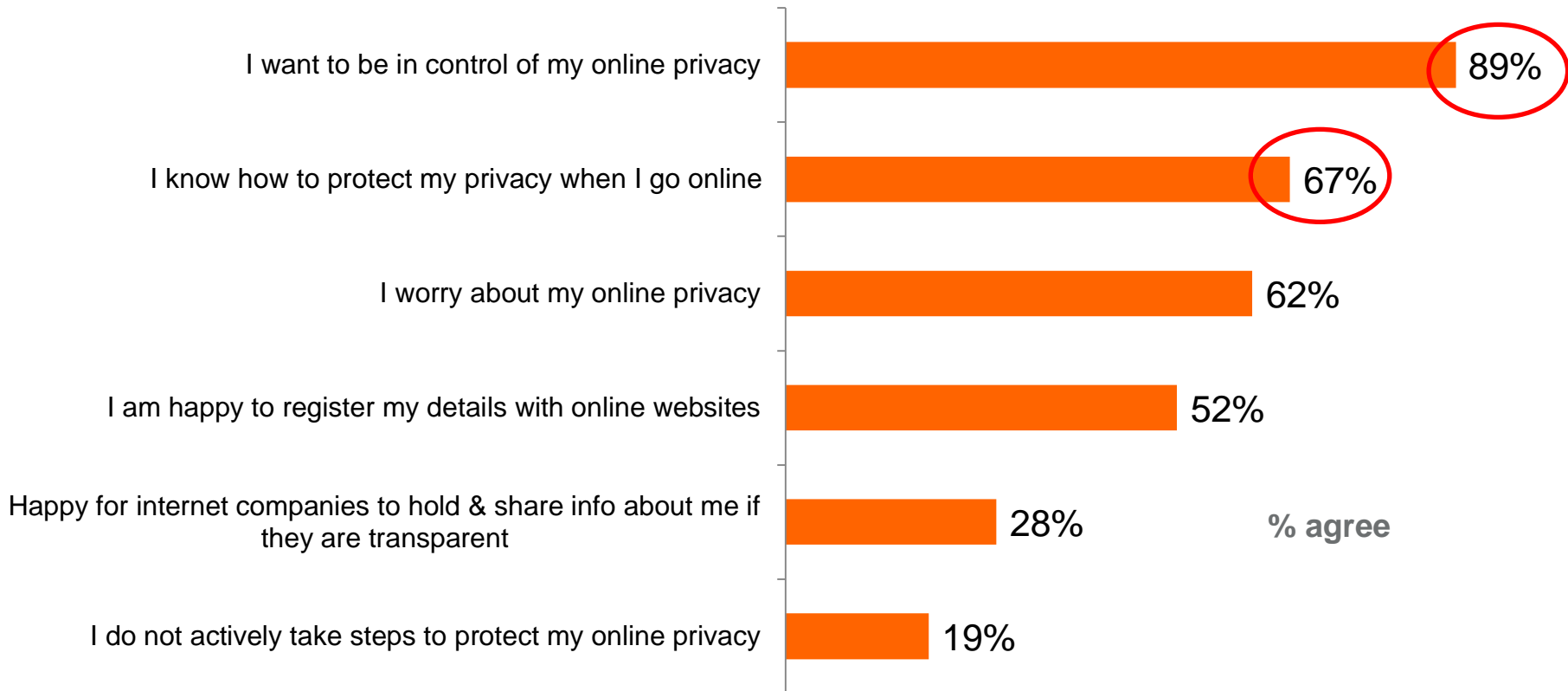
2: ATTITUDES TO ONLINE DATA AND PRIVACY



Consumers take online privacy *seriously*



**89% agree they want to be in control of their online privacy;
67% already feel they know how to**



To what extent do you agree or disagree with the following statements?
Base: All Adult Internet Users in the last month (2001)



Attitudes to privacy differ by age group



The **over 55's** are **more worried** about online privacy and are **more likely** to actively **protect** it

	16-24 yrs	55+ yrs
I want to be in control of my online privacy	84%	93%
I worry about my online privacy	58%	63%
I do not actively take steps to protect my online privacy	27%	17%

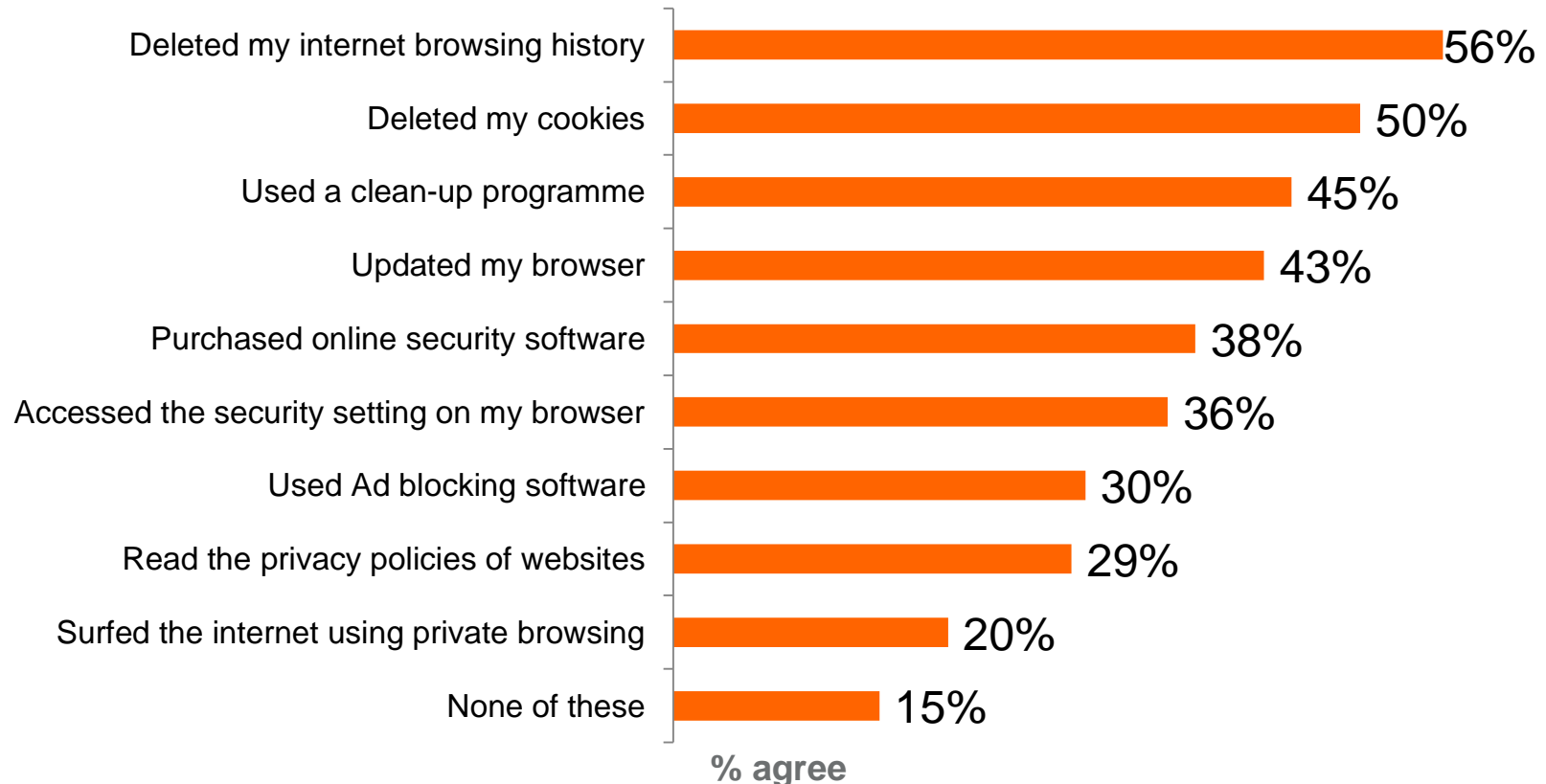
- **Over 55's** want more control
- **16-24's** less worried
- **Over 55's** also more likely to actively protect privacy



People are *taking steps* *to control online privacy*



Over **half of internet users** have **deleted their browsing history** and **one in two users** have **deleted their cookies** in the last six months



Still thinking about online privacy, which of the following activities have you done within the last six months?

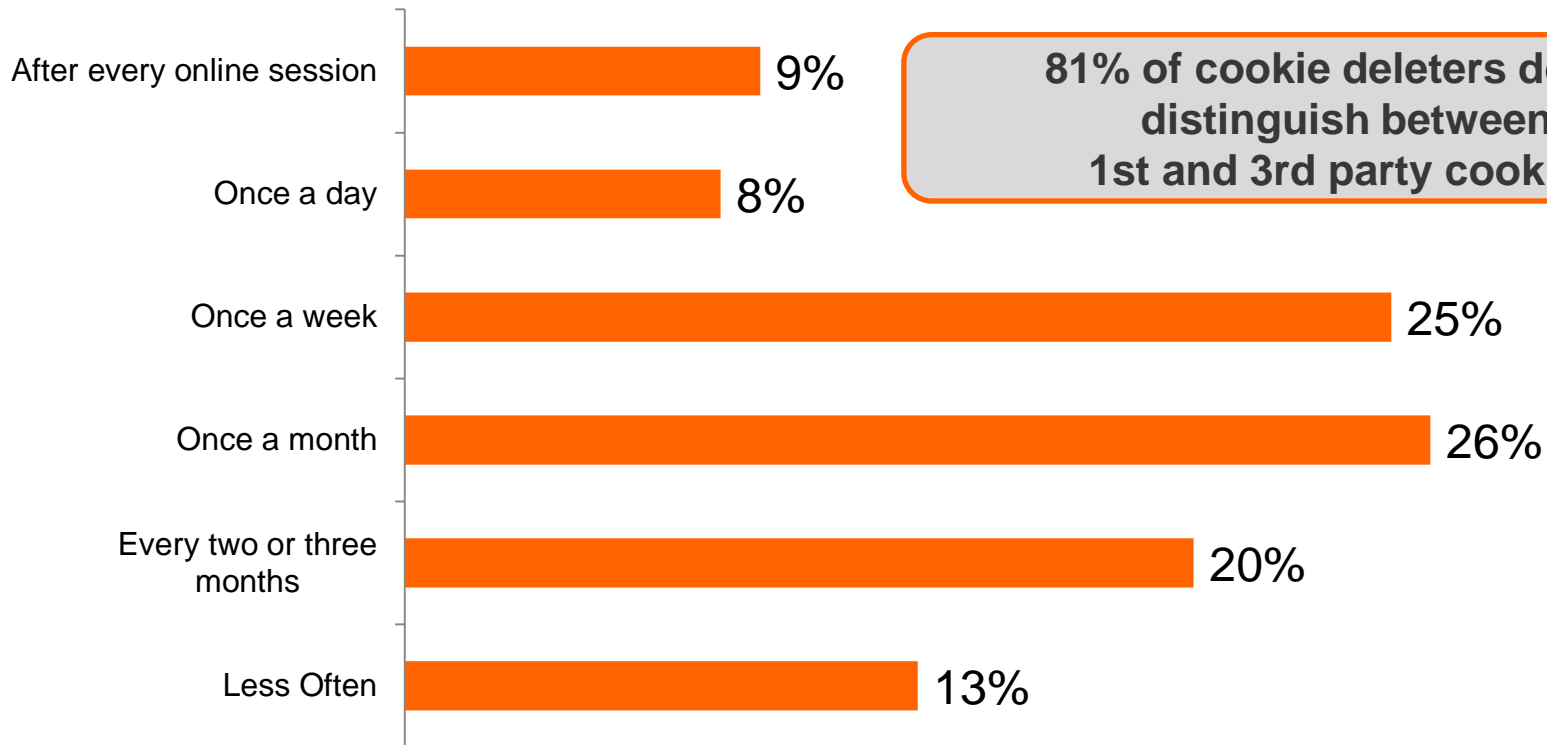
Base: All Adult Internet Users in the last month (2011)



One in ten of “deleters” delete every session



Of those who delete cookies,
42% delete them at least once a week



81% of cookie deleters do not distinguish between 1st and 3rd party cookies

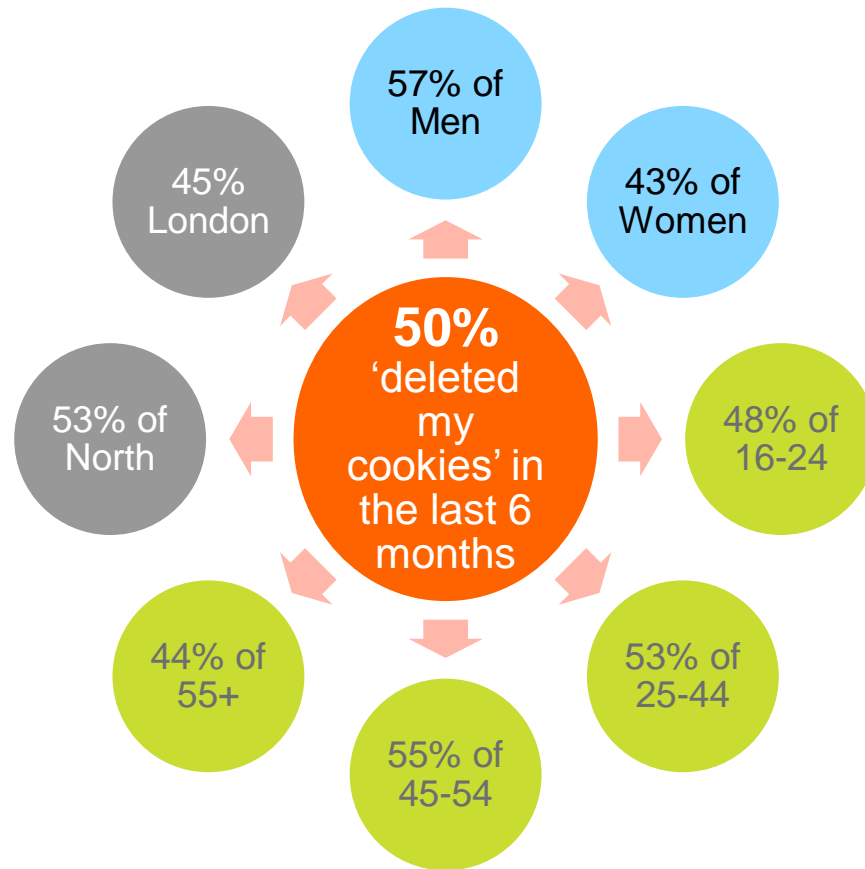
How often do you delete your cookies? / Do you distinguish between 1st party and 3rd party cookies when deleting your cookies? Base: All who delete cookies (1050)



There is *variation* in the profile of “*cookie deleters*”



Men and 25-54's are more likely to have deleted cookies

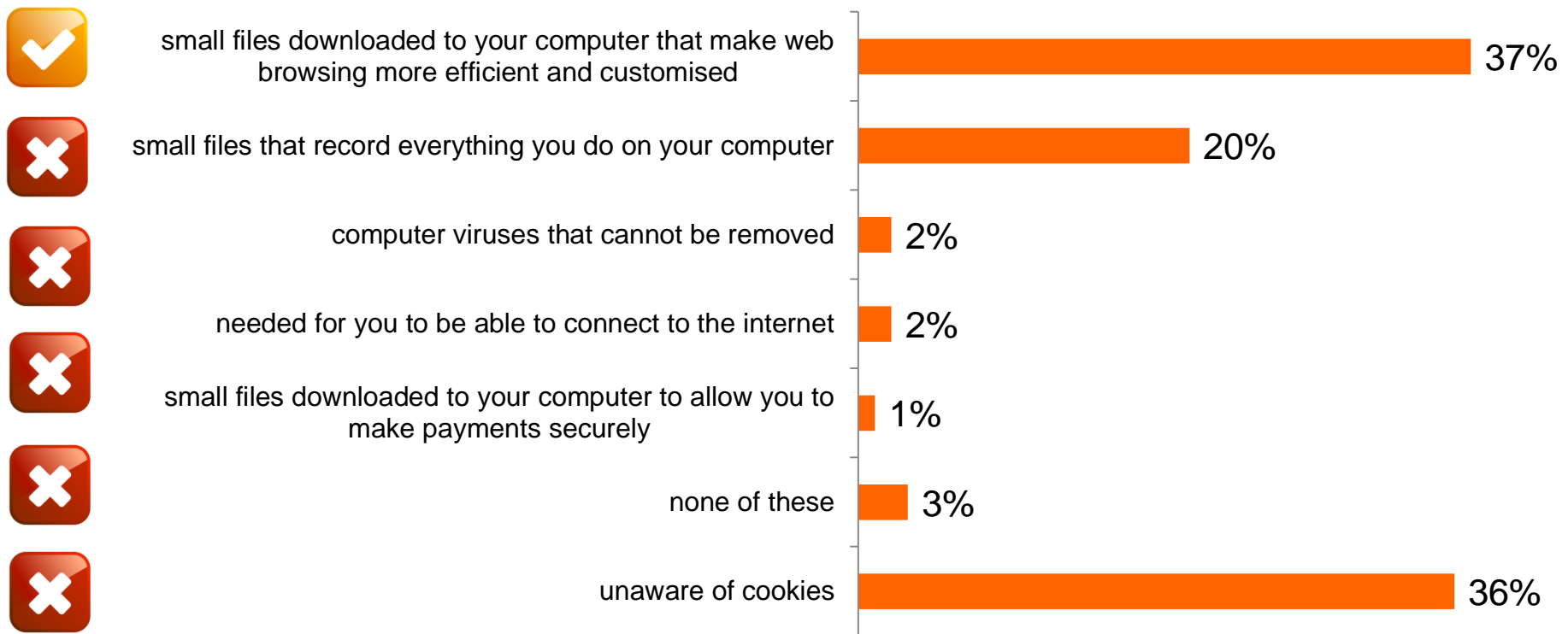




Over a third of people *identified* what a cookie is...



36% of the sample were unaware of cookies



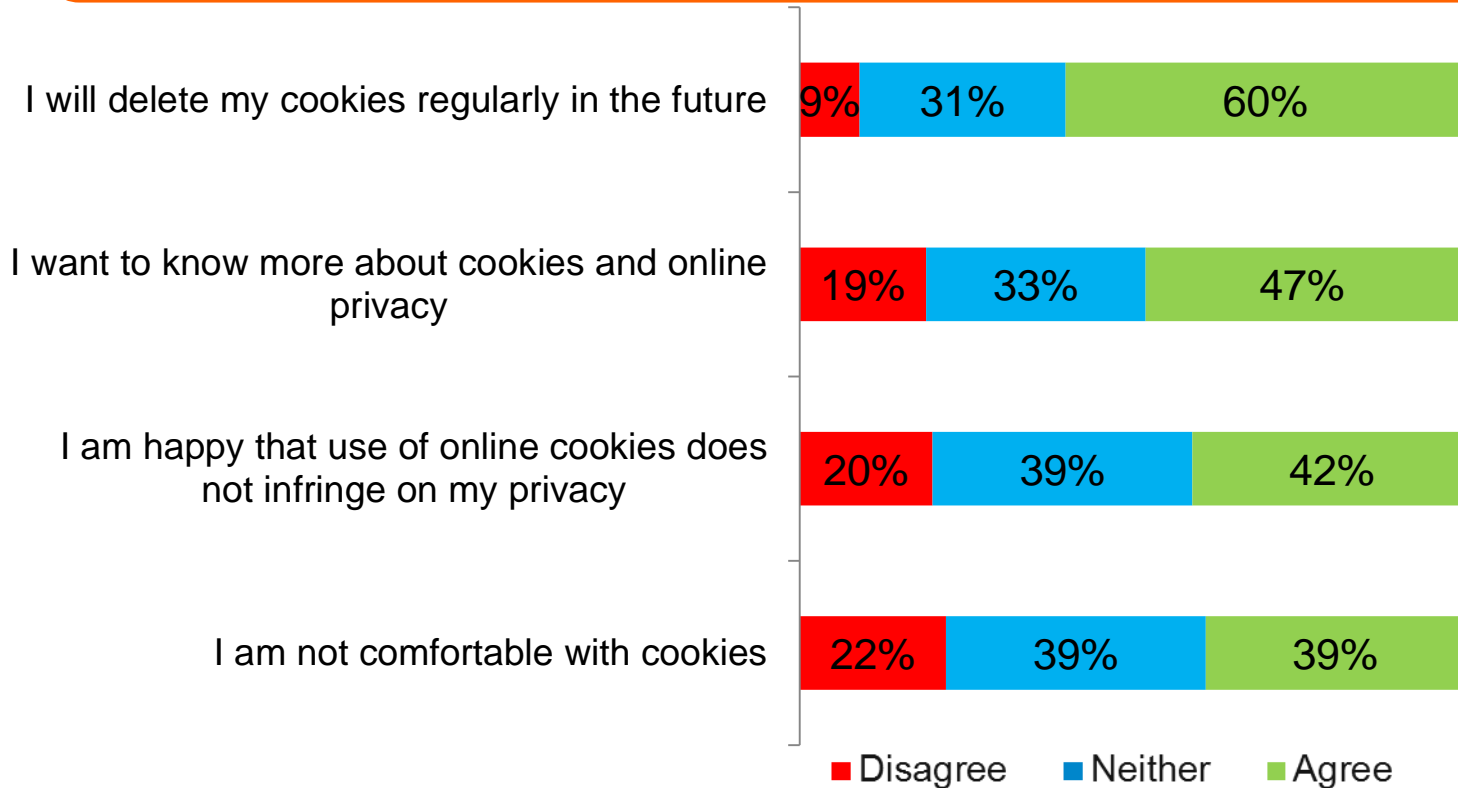
Please tell us which one of the following statements is correct?
Base: All internet users (2001) – rebased to include those unaware of cookies



Most people *want to know more about cookies*



A cookie is a small file of letters and numbers downloaded on to your computer when you access certain websites. Cookies allow a website to recognise a user's computer and can make using the internet more efficient and allow sites to offer customised content and advertising.



Having had the role of cookies explained, how strongly do you agree or disagree with the following statements?
Base: All Adult Internet Users in the last month (2001)



People want to be *in control* online



- Nearly two thirds **worry** about their online privacy
- Internet users **want to be in control** of their online privacy
- Majority are already **taking steps to control security**
- Only about a third of internet users actually understand **what a cookie is...**
- ...though **half** claim to **delete** their cookies
- Half **want to know more** about cookies & online privacy



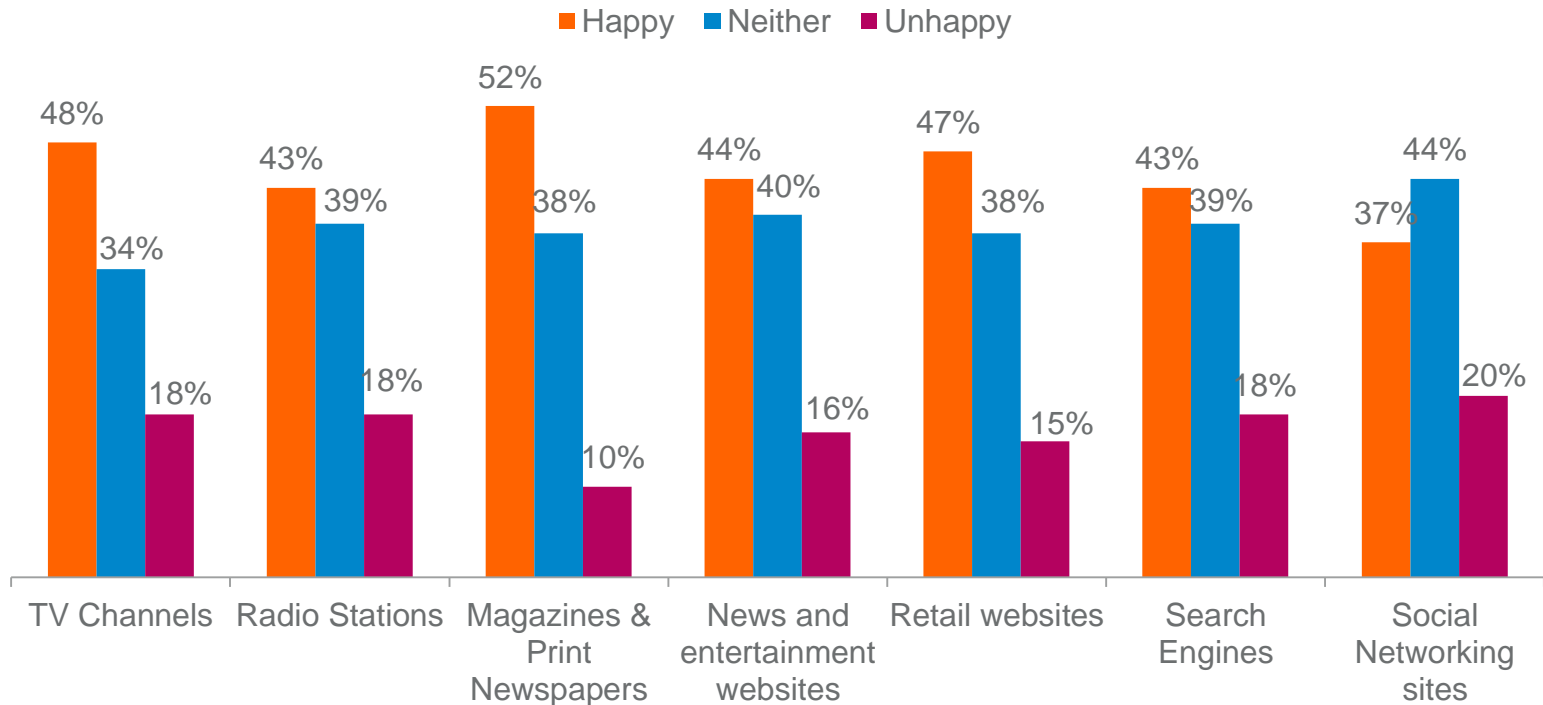
3: ATTITUDES TO ADVERTISING



Users *understand the need* for advertising...



How happy, or unhappy, are people to see different forms of advertising on different media?



Apart from BBC services (which are paid for by the licence fee), lots of media use advertising to enable them to provide you with TV programmes, newspaper articles and websites. To what extent are you happy or unhappy to see advertising on these media, given the services it helps provide?

Base: All Adult Internet Users in the last month (2001)

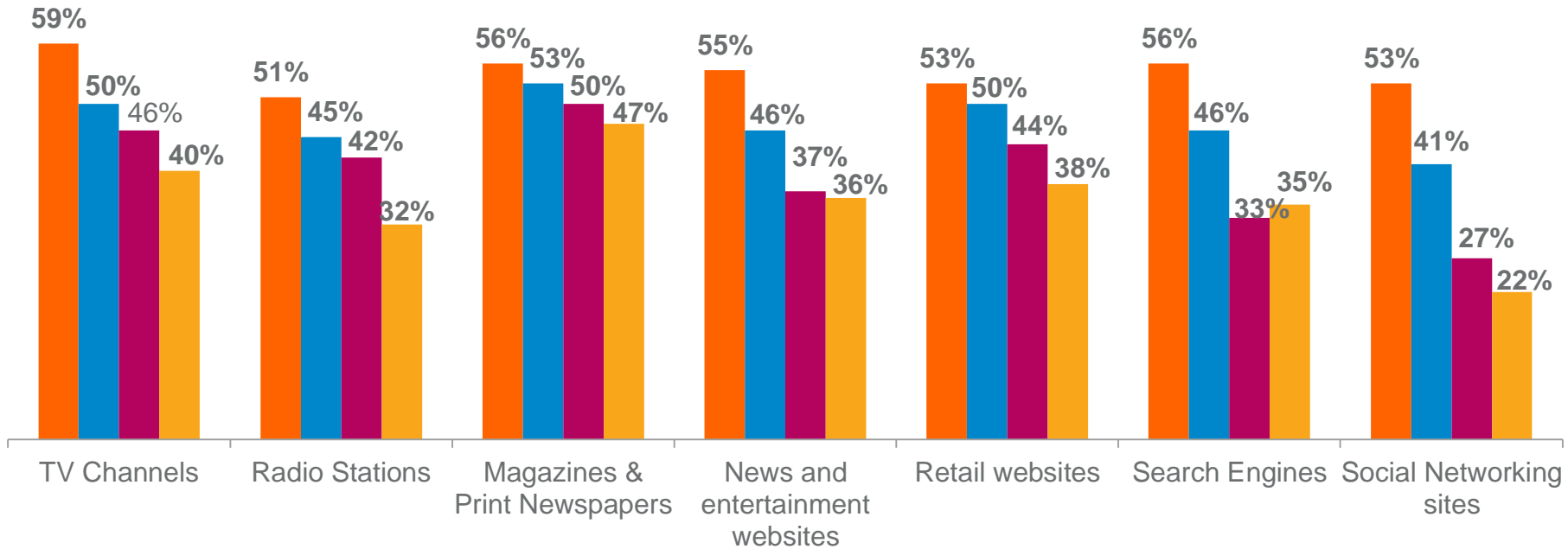


Younger users have *greater traction* with advertising



Happy (net figures):

16-24 25-44 45-54 55+



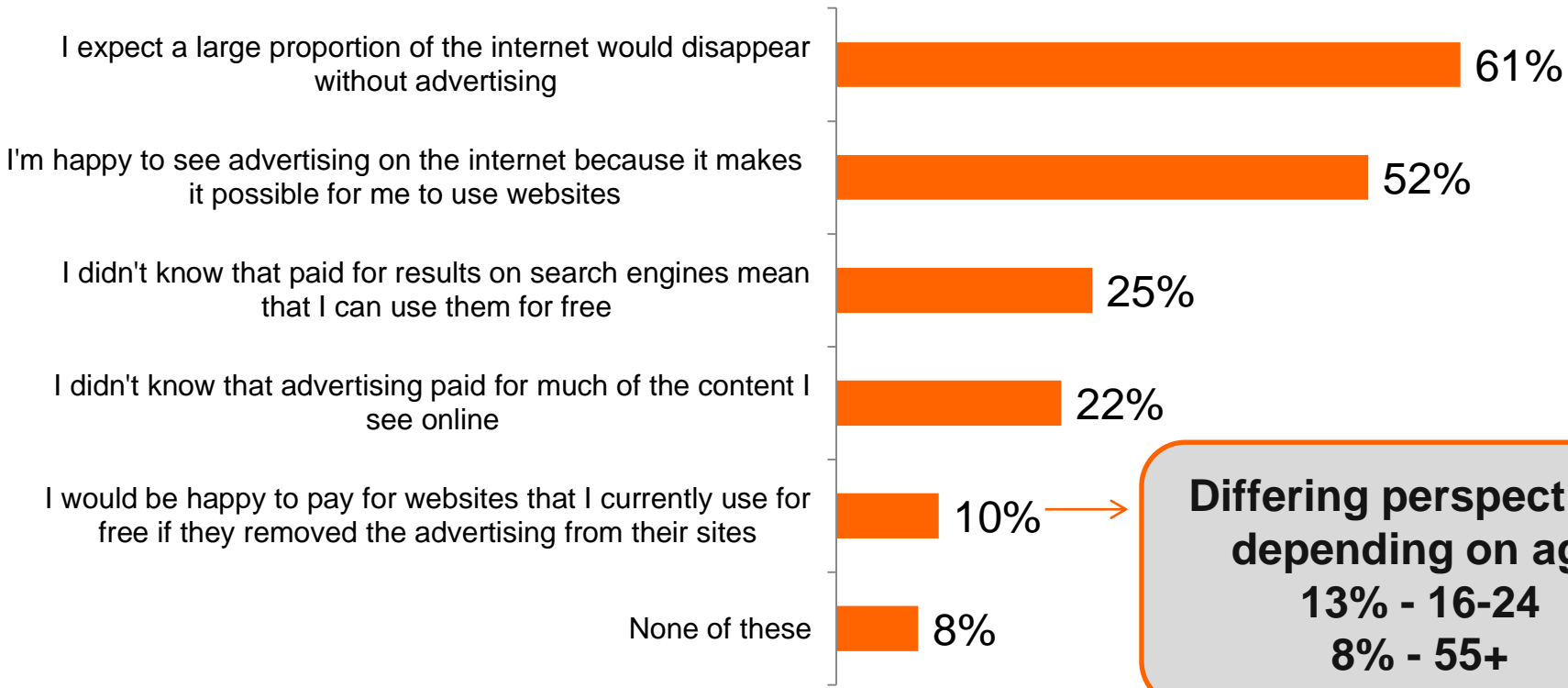
Apart from BBC services (which are paid for by the licence fee), lots of media use advertising to enable them to provide you with TV programmes, newspaper articles and websites. To what extent are you happy or unhappy to see advertising on these media, given the services it helps provide?
Base: All Adult Internet Users in the last month (2011)



Only one in ten internet users would pay for ad free content



61% expect of people think that a large proportion of the internet would disappear without advertising



Differing perspectives depending on age
13% - 16-24
8% - 55+

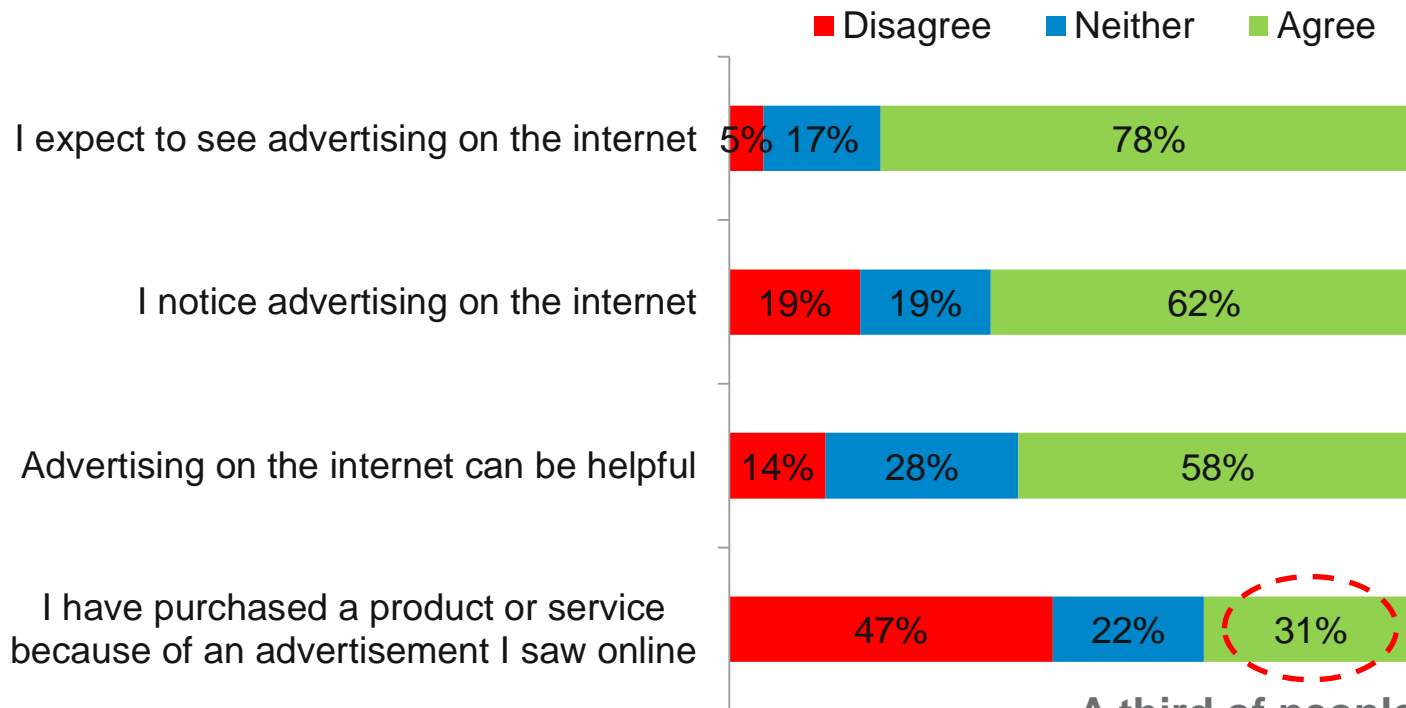
Websites like Google, Facebook and MailOnline (Daily Mail Online) are able to provide content for you because they make money from advertising. Please choose the statements that you agree with. Base: All adult internet users in the last month (2001)



Users *expect advertising* online and majority find it *helpful*



Over three quarters of internet users agree that they expect to see advertising on the internet



A third of people claim to have made a purchase because of an online Ad

Still thinking about advertising, to what extent do you agree or disagree with the following statements?.

Base: All adult internet users in the last month (2001)



Ads that give special offers are *most* useful



← **42% liked**
“Ads that give me **special offers**”



← **20% liked**
“Ads that offer me the chance to **click through** and find **more info**”



← **30% liked**
“Ads that **remind me** of products or services that I’m interested in”



← **14% liked**
“Ads that remind me of advertisements that I’ve seen in **other media** – for example **TV ads**”



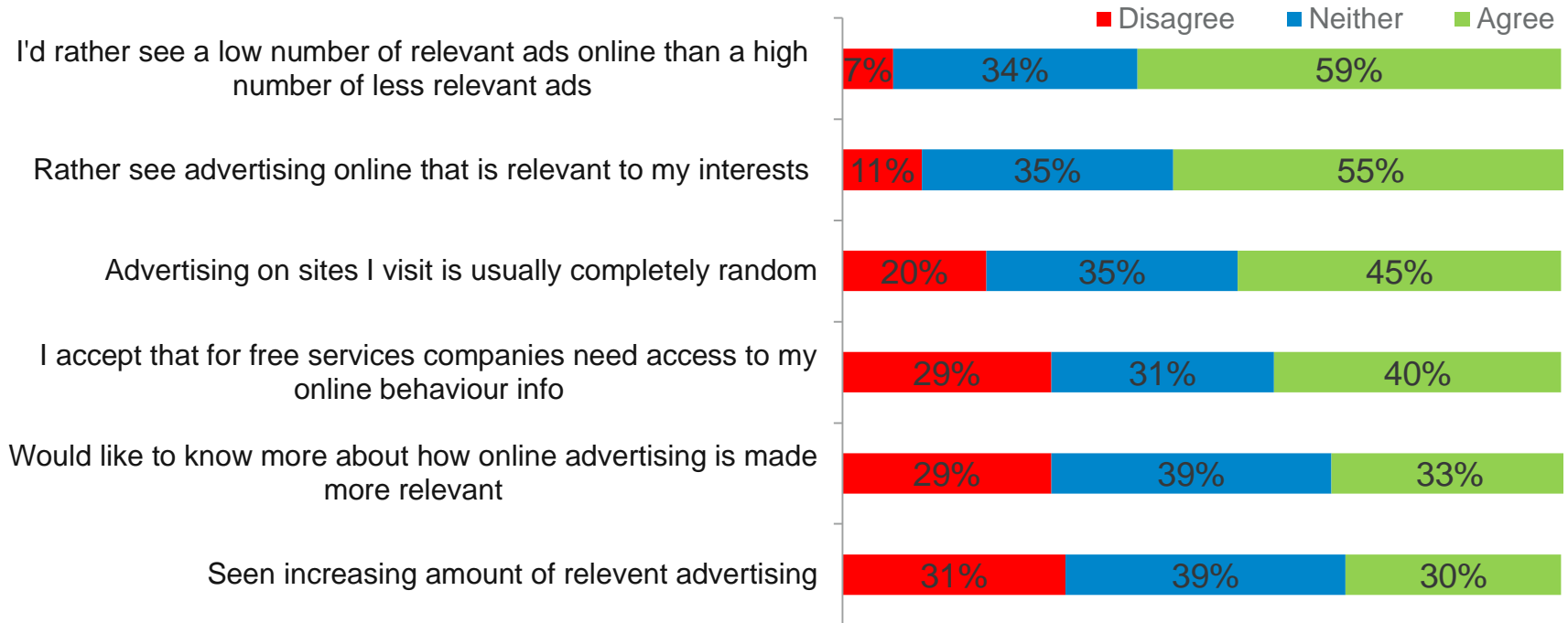
← **23% liked**
“Ads that are **entertaining** and well designed”



Over half prefer to see ads that are *relevant* to their interests



Most internet users would rather see a **low number of relevant ads online** than a high number of less relevant ones

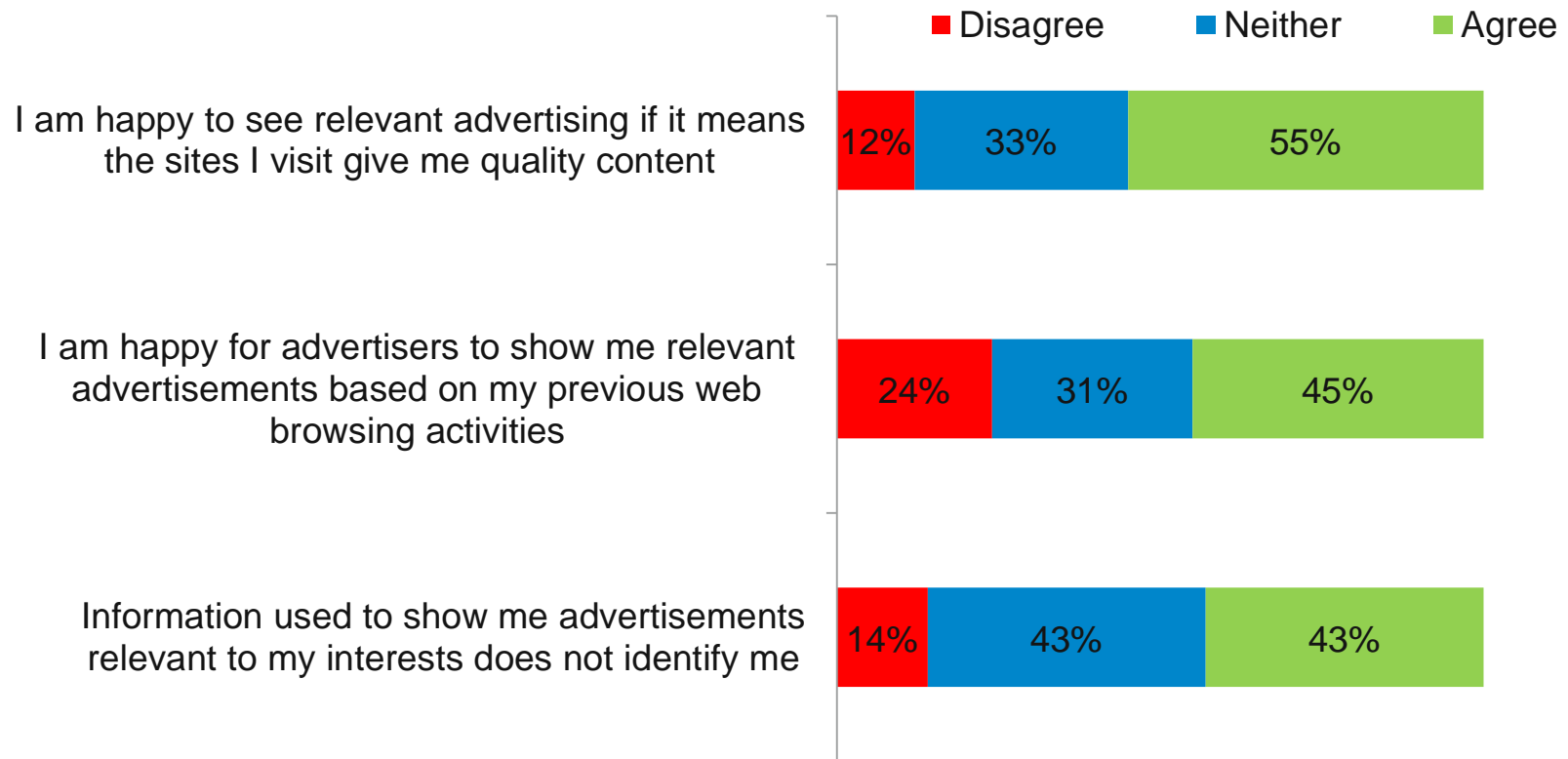


Thinking about online advertising, to what extent do you agree or disagree with the following statements?

Base: All adult internet users in the last month (2001)



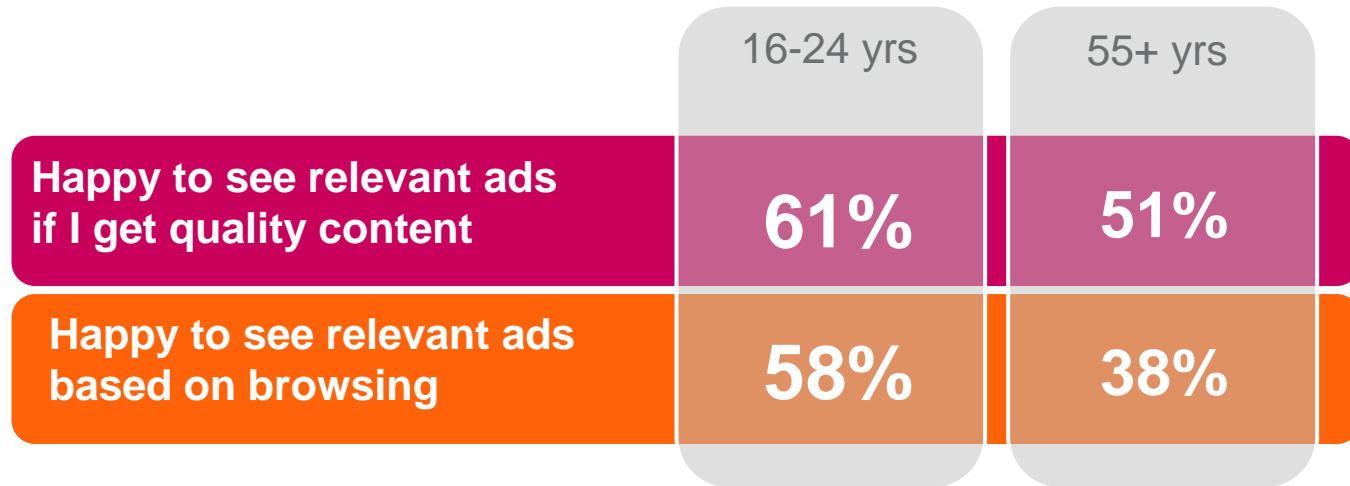
People are happy to see *relevant ads* in exchange for *quality content*



Showing advertising that is relevant to you can be done by using web browsing information. The information used does not identify you as an individual; it just matches categories of online activities (e.g. visiting car websites) with possible advertisements (e.g. for new cars) To what extent do you agree or disagree with the following statements? .
Base: All adult internet users in the last month (2001)



Attitudes to advertising differ by age group



- 16 – 24’s happy to see relevant ads in exchange for quality content
- Over 55’s less accepting of relevant ads based on browsing history



Users *understand* the need for *advertising online*



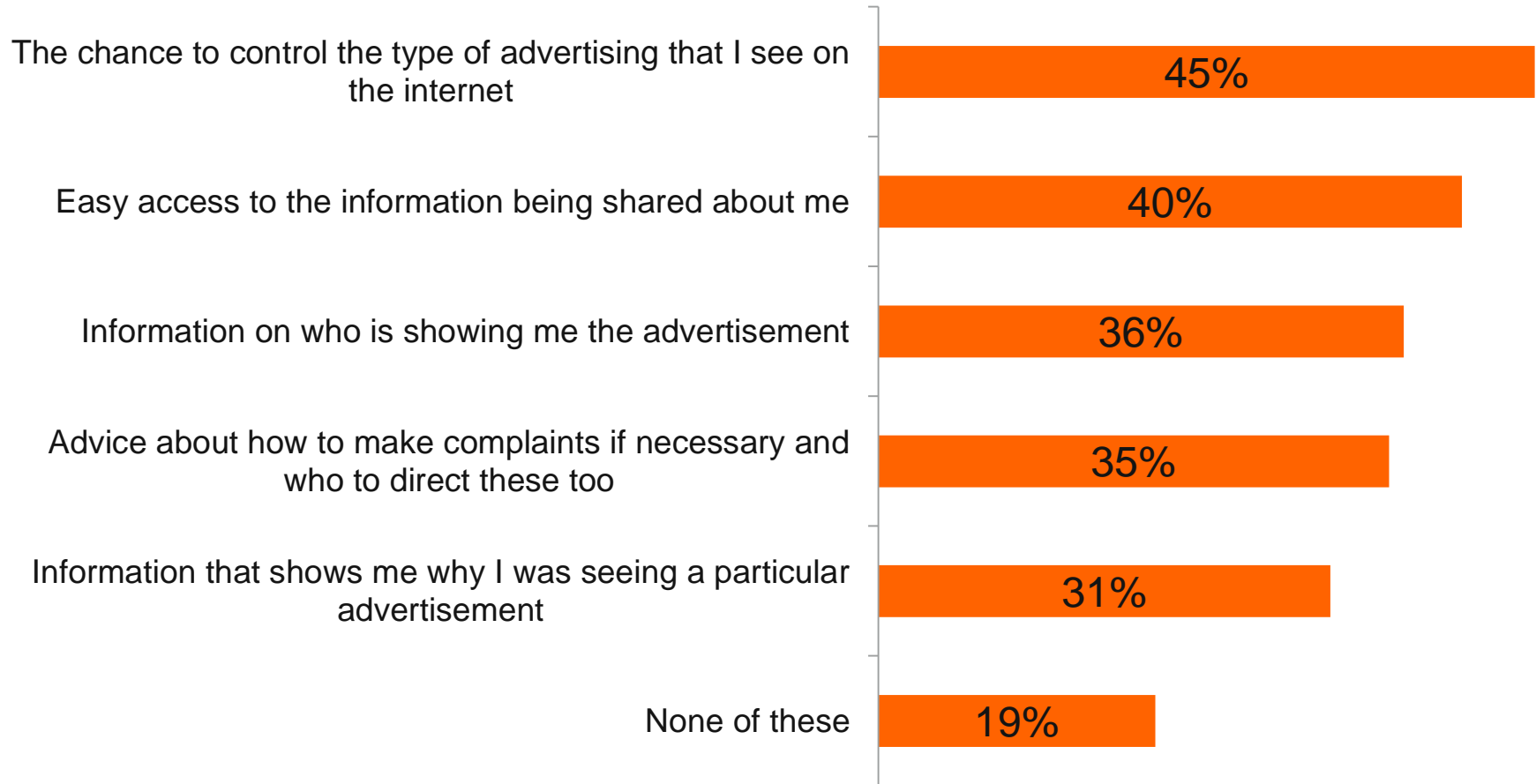
- Internet users are generally **happy to see advertising** across all media
- Internet users expect to see advertising online and understand **the need for advertising** to provide the content they want
- The **majority** think that **online advertising** can be **helpful** and **prefer** to see **relevant** advertising
- **Younger** age groups are **more positive** about **advertising** and more likely to be happy for their **browsing activities** to be used



4: CONTROL AND THE ROLE OF THE ICON



81% thought at least one control would be useful ...



Which of these, if any, would you find useful when controlling the online advertising that you see?.
Base: All adult internet users in the last month (2001)



Looking at the *Adchoices Icon...*



We explained what the Icon is and how it works to anyone who was not aware of it:

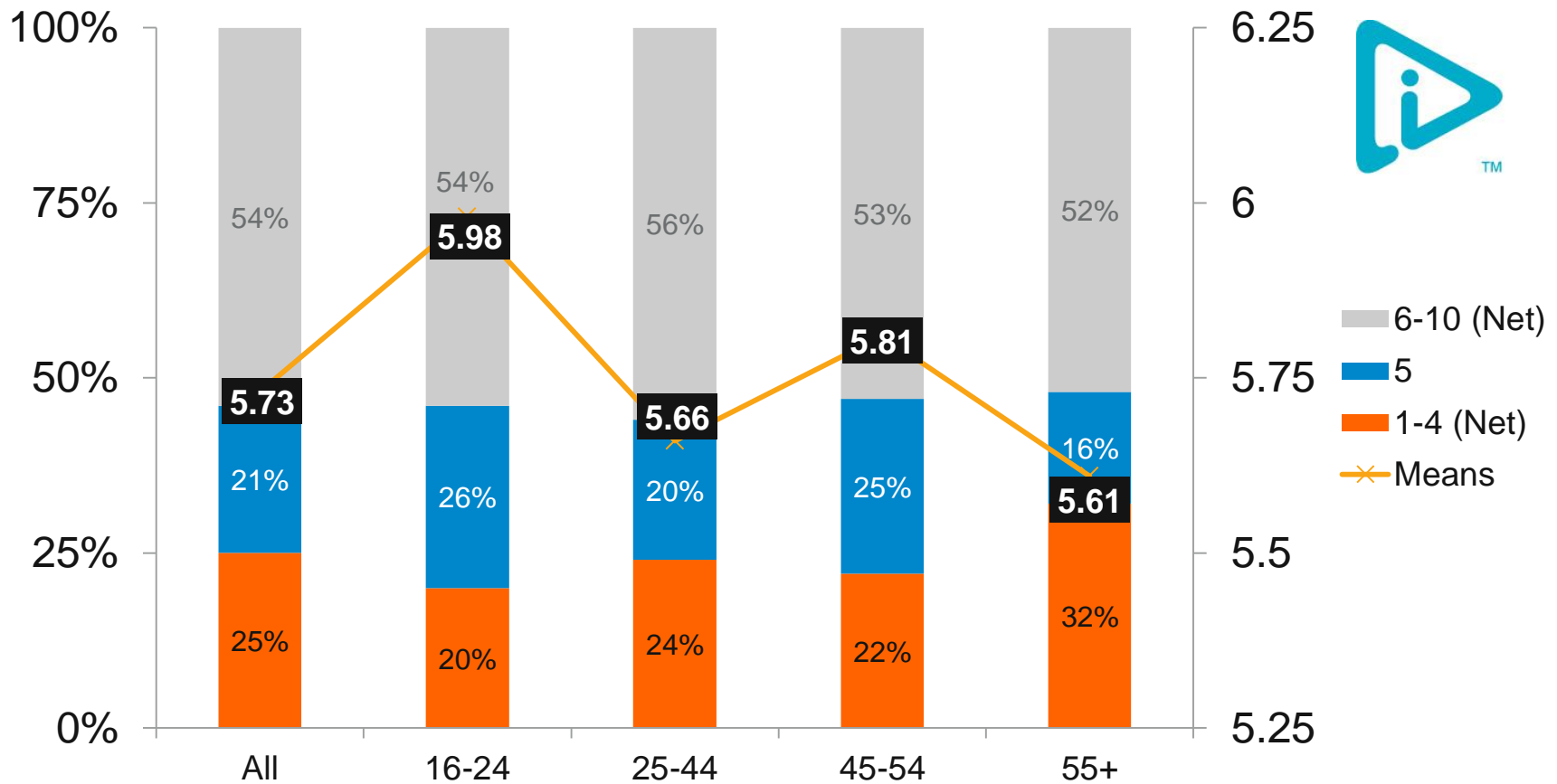


*“When you see it on a website **it signifies that customised advertisements based on web browsing activity can be served to you.** By clicking on the icon you can visit a website that enables you to control this type of advertising.”*





Over half of internet users said they would be *reassured*



- 6-10 (Net)
- 5
- 1-4 (Net)
- Means

On a scale of 1 to 10 (where 1 is not all reassured and 10 is very reassuring) how reassured would you be that you can control your online privacy when you see the Advertising icon? Base: All Adult Internet Users in the last month (1361)



5: CONCLUSIONS



Key points



- Consensus is that **the internet is important** in modern life
- The **majority** of internet users are **worried** about online **privacy**
- **9 out of 10 want** to be in **control** of their online privacy
- **Two thirds** already know how to **protect** their privacy online
- There are **key differences** in **age groups**
- **Half** of internet users claim to have **deleted cookies** in last six months
- **One third** could **correctly identify** what a **cookie** is



Key points



- About **half** of internet users are **happy to see advertising** on all media
- **Happiness** with advertising also **varies by age group**
- Internet users **understand** that **content** is dependent on **advertising**
- **Majority** of internet users think that **online advertising** can be **helpful**
- Just under **half** of internet users are **happy** to see **relevant advertising** based on their **browsing behaviour**
- **Four out of five** would like to use one of the tools to **control their privacy** online



Thanks to

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