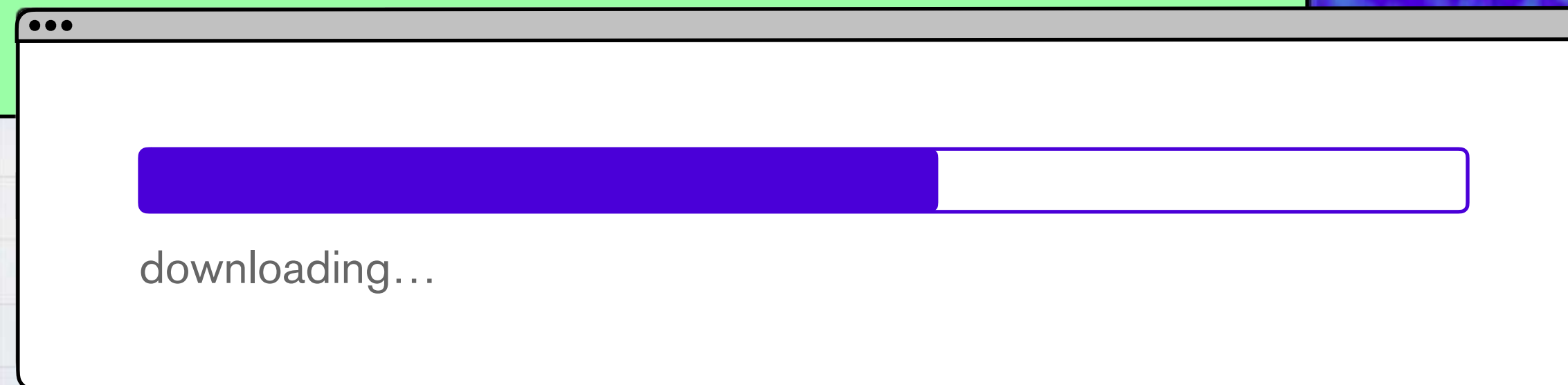
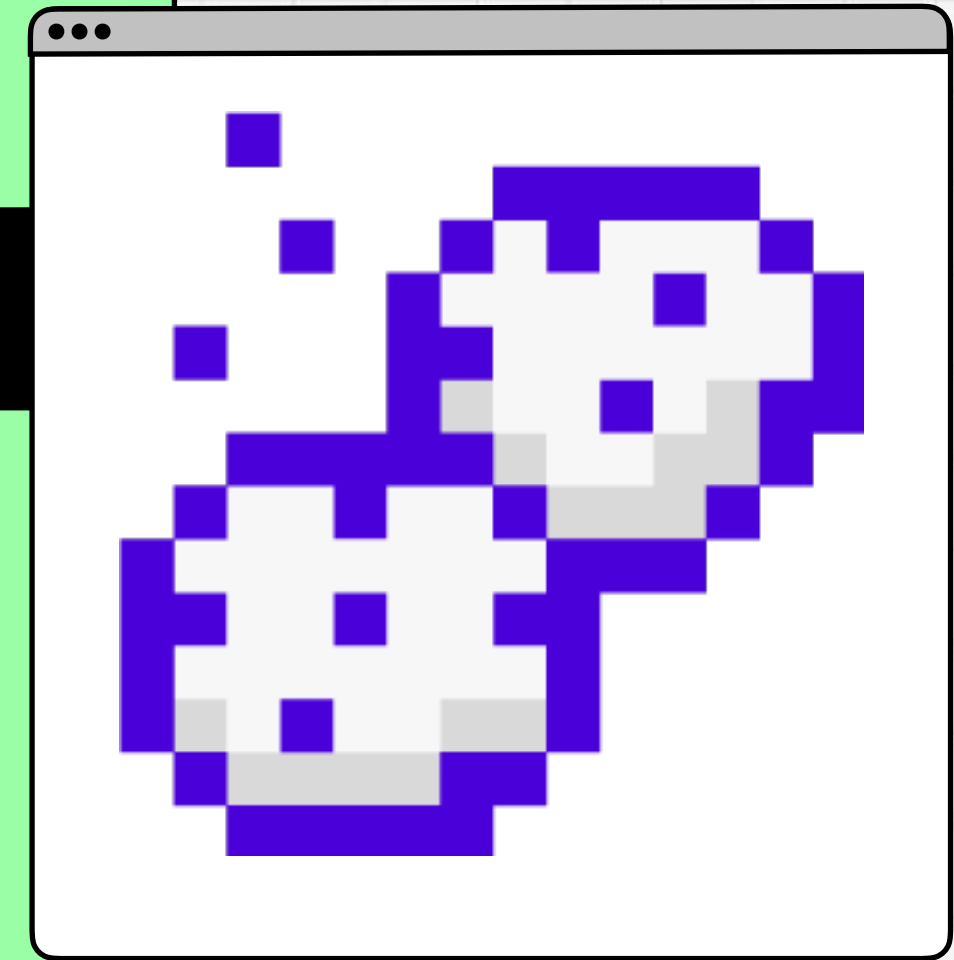
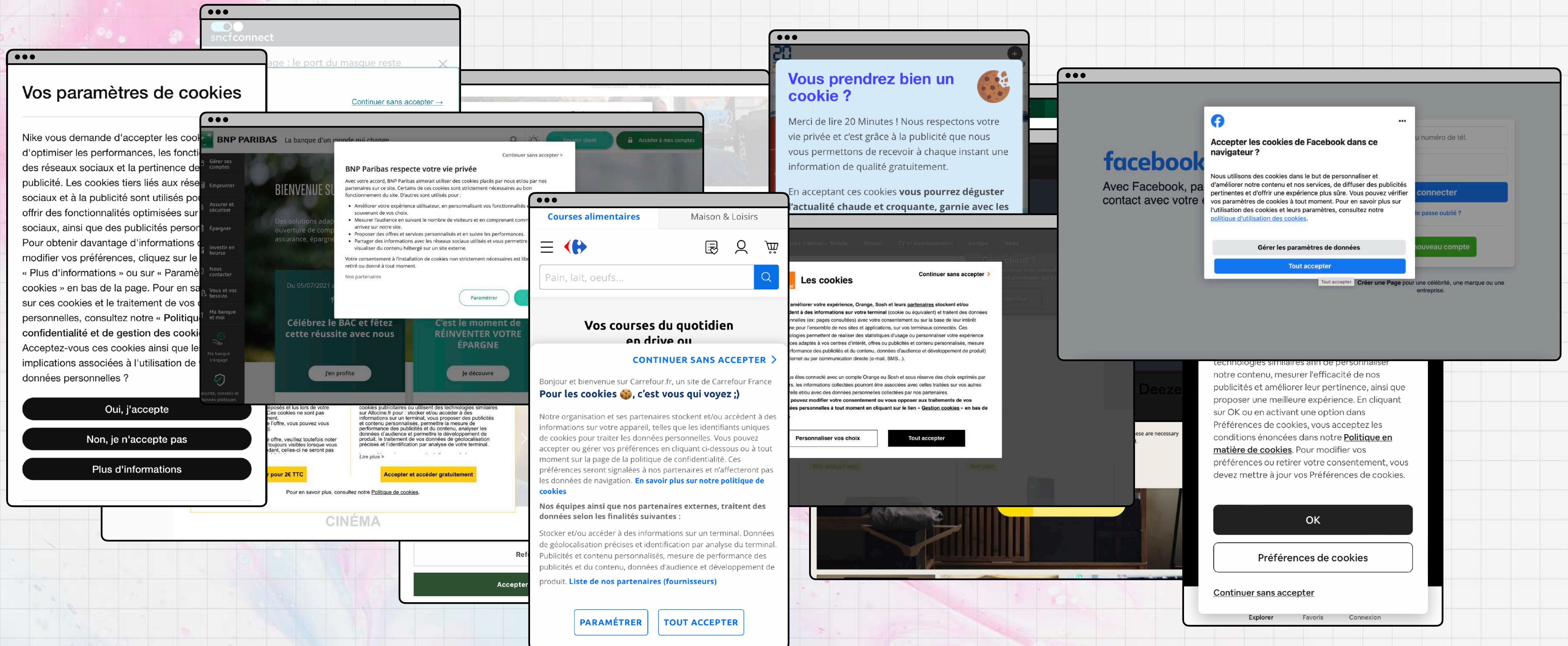


Cookie consent and French consumers

Does accepting mean consenting ?



A typical digital experience, today



A burning issue at the heart of the news

For legislators

From isolated initiatives
to a proliferation of regulations
around the world

For inspection authorities

From a control sometimes judged too
shy, to a coordinated, dissuasive, even
punitive force when necessary

For the GAFAs

From cookies as *shadow enablers* to
eprivacy as a marketing asset

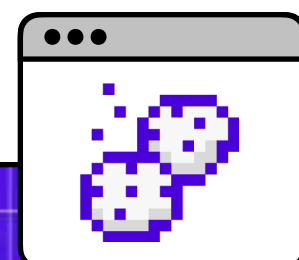


**LA MORT ANNONCÉE DES
COOKIES (TIERS) : ET
MAINTENANT ?**

And at the heart of people's daily lives



The only way for them to take part in this expert discussion about THEIR own privacy is to click on "accept", "decline", "set" on the consent banners.



Accept

Decline

Set

We decided to put users back at the forefront of our discussions

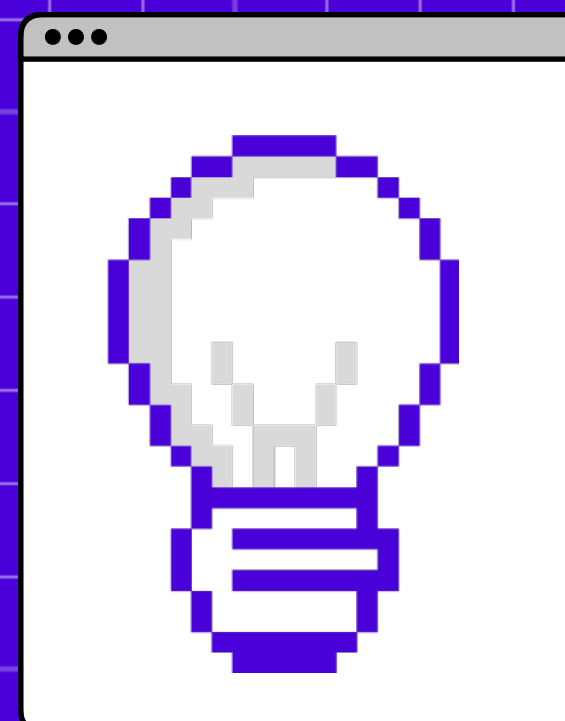
1. French users towards cookie banners

- ✦ How do they perceive cookie banners ?
- ✦ How do they interact with them ?
- ✦ What do they understand about it ?
- ✦ What choices do they make ?
- ✦ What do they really consent to when they accept?

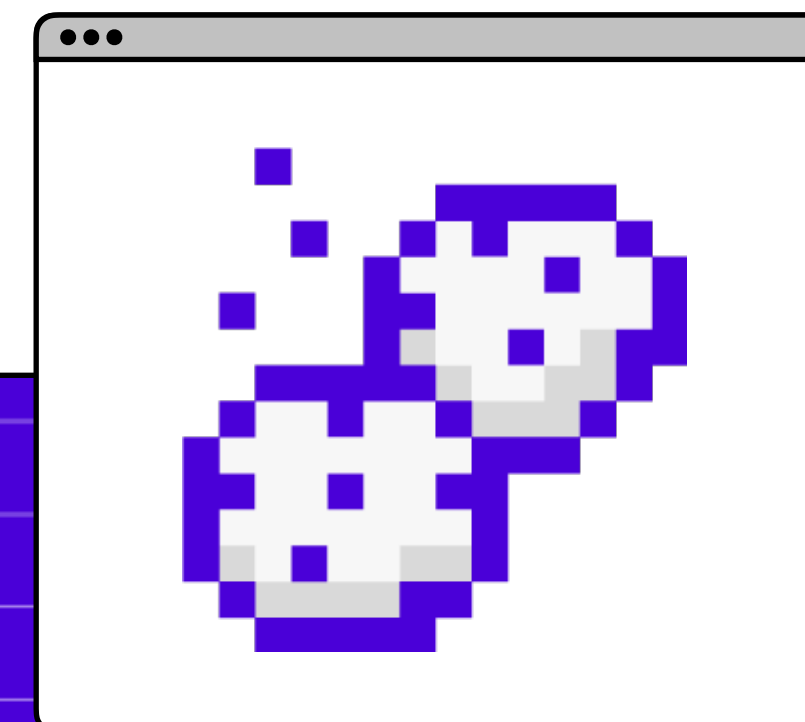
2. How brands should adapt

- ✦ How can brands continue to thrive in the era of informed consent?

A quantitative study of 1000 French people
A social listening analyses of 4000 tweets



French users **towards cookie** **banners**



**Protecting their privacy is a
priority**

93

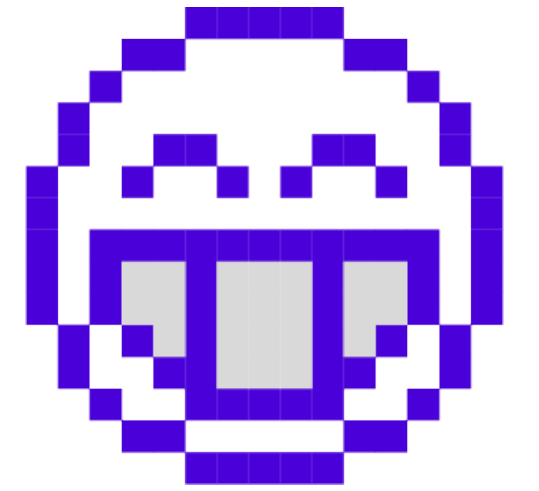
%



**Find it important to protect
their privacy**

Q01) The following sentences describe different opinions and/or values. There is no right or wrong answer, only your opinion counts (n=1000) (Total Agreement) : The most important thing for me is to protect my privacy

They show a lack of trust, even defiance, in the institutions that protect them



80%

are concerned about the
protection of the data they
share (1)

60%

fear that private companies
will control the country (2)

50%

think that the legislation
regarding data sharing does
not really protect them (2)

49%

do not think they have control
over their data (2)

(1) Q04) Here are some statements about internet browsing habits. Please indicate your level of agreement. (n=1000) (Total Agreement) : I am concerned about the protection of my personal info that I share on the internet. (2) Q01) The following sentences describe different opinions and/or values. There is no right or wrong answer, only your opinion counts (n=1000): I am concerned that private companies will control our country (Total Agreement); I think the current legislation regarding data sharing protects me (Total Disagree); (Total Disagree) I think I have control over my data.

They adopt alternative behaviors to protect themselves

87%

are careful not to reveal too much information on the Internet (1)

51%

say they use adblockers (1)

49%

report using private browser windows (1)

Q04) Internet browsing habits. Please indicate your level of agreement (n=1000): I am careful not to give out too much personal information on the Internet (Total Agreement); I use an "ad blocker" to block advertisements on the Internet (Total Agreement); I use private browsing windows when I am on the Internet (Total Agreement)

Only 16%

say they have open profiles on their social networks (2)

I closely control who has access and to what content : I give access mainly to my entourage and to people I know

63%

I don't pay attention to it / I have never thought about it

21%

My profiles and all content are open to the public and to all, beyond my circle of friends

16%

0 20 40 60 80

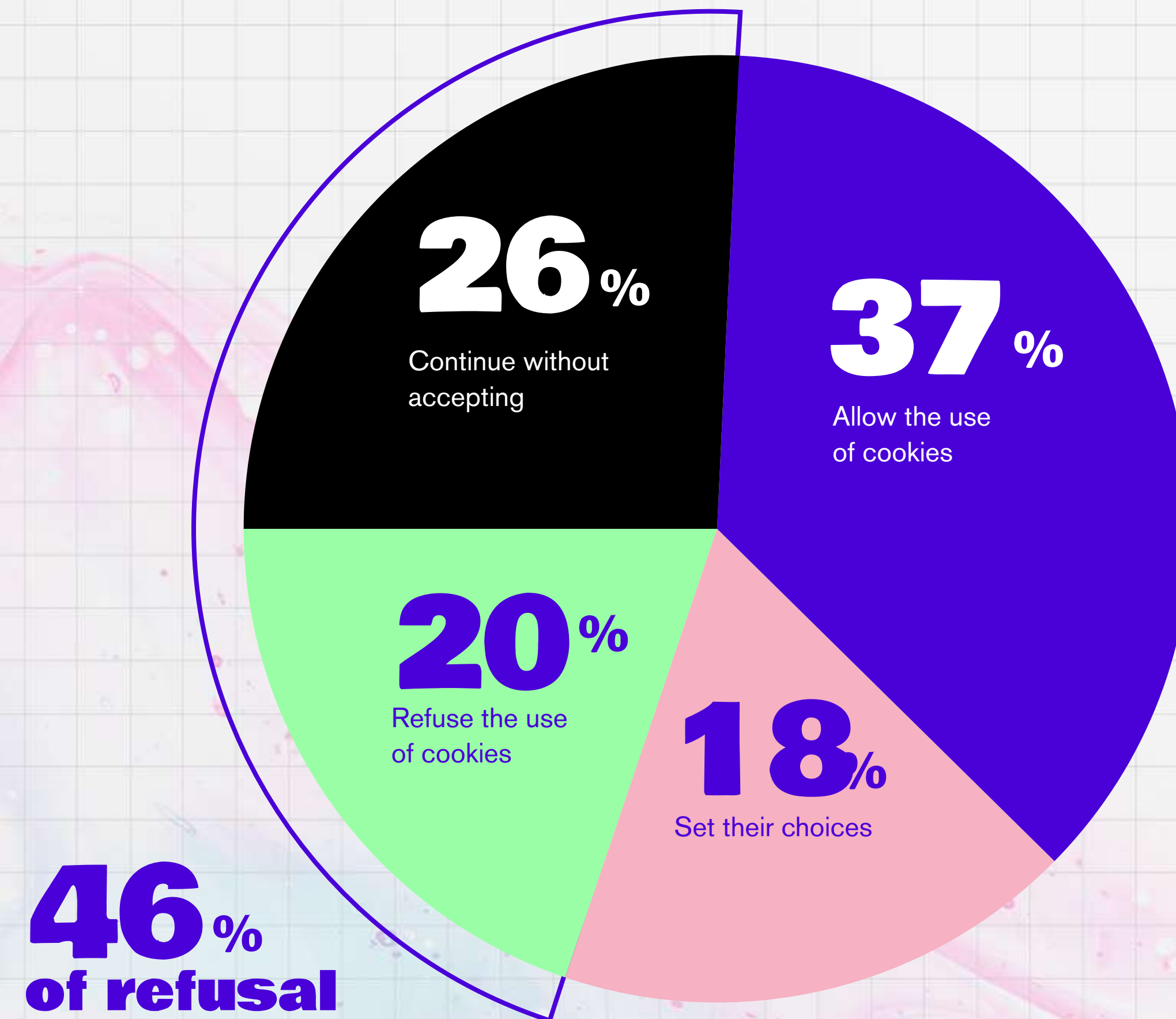
A higher percentage amongst younger people but still remains low

21% of 18-24 year-olds
Declare having their profile open on social networks

20% of 25-34 year-olds
Declare having their profile open on social networks

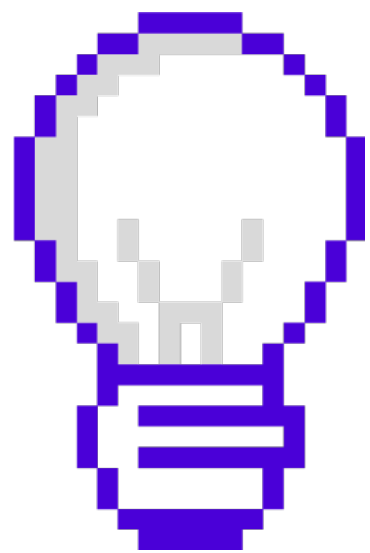
Q07) Most often, how do you manage access and visibility of your profile on your social networks? (n = 1000)

**This is visible in the choices they make
regarding their cookie usage**



Q18) Generally, what choice do you make when a cookie sharing permission banner appears on your screen?
(n = 1000)

**Analysis of the user
journey, from
the banner's
visibility
to the user
decision-making**



With cookie banners, French users share a "love-hate relationship »

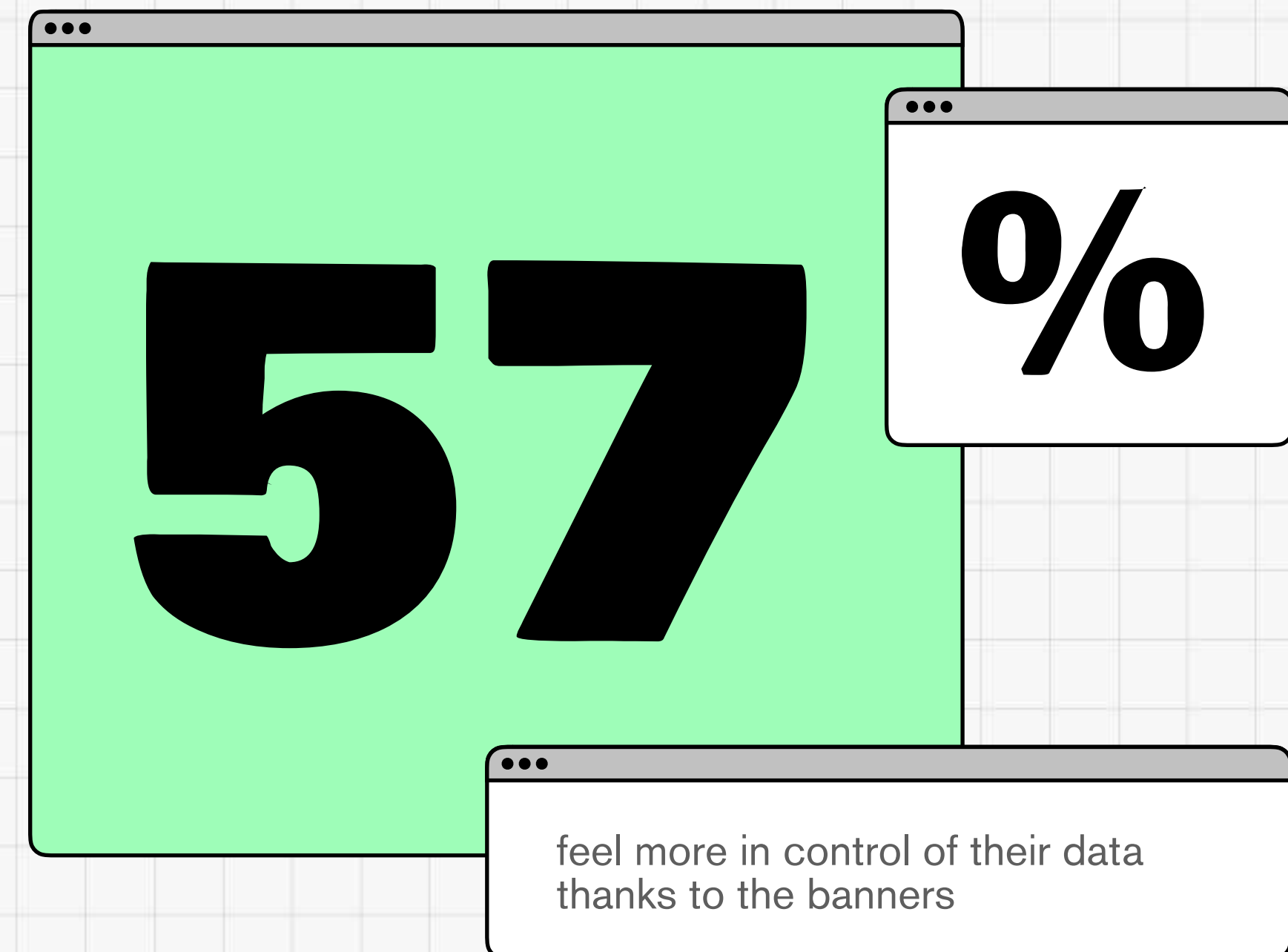
An irritating banner

A large part of the analyzed tweets about cookies mention the digital pollution they represent

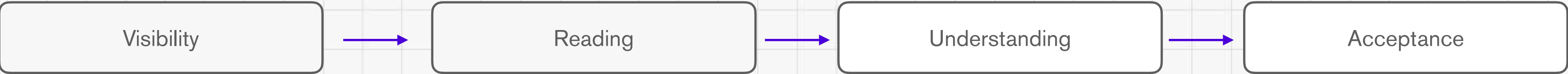


Social listening tools : Brandwatch, 2021

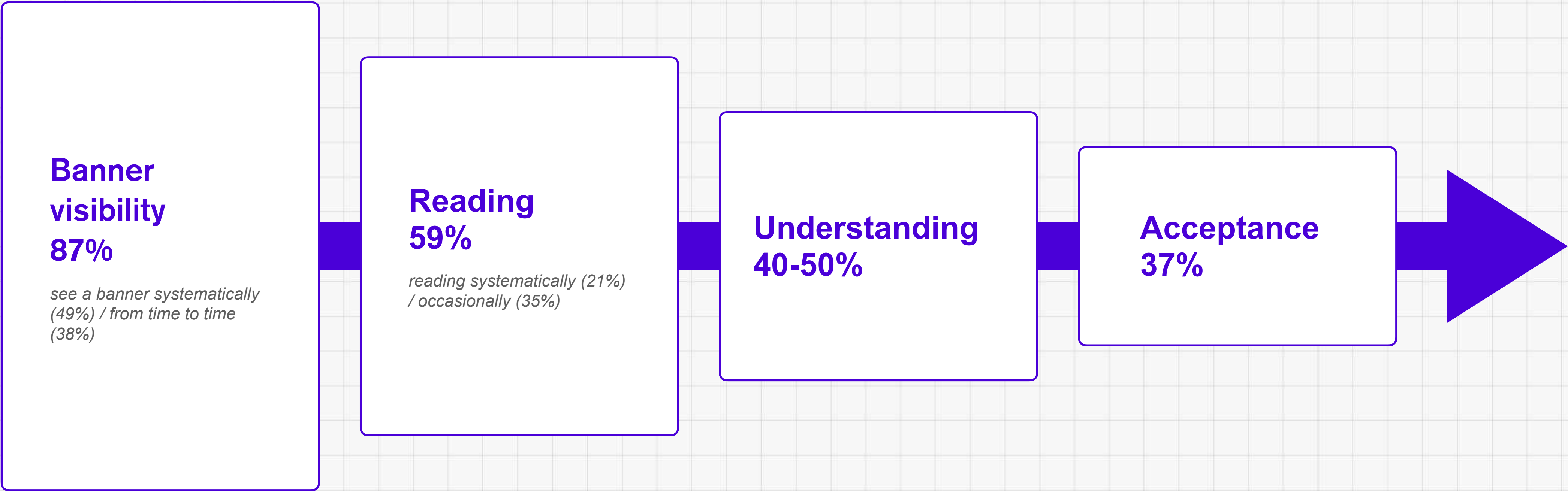
Yet a feeling of control

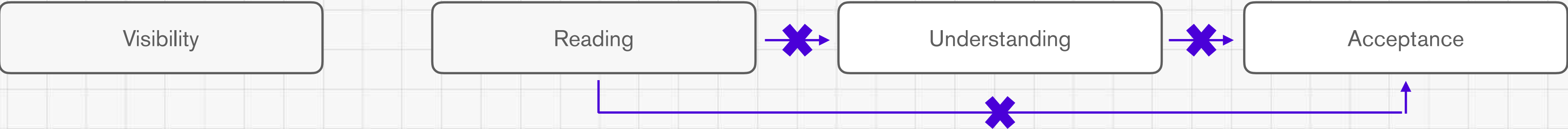


Q29) When I accept or decline cookies, I feel in full control of my privacy and data sharing (n = 1000) (Total Agreement)



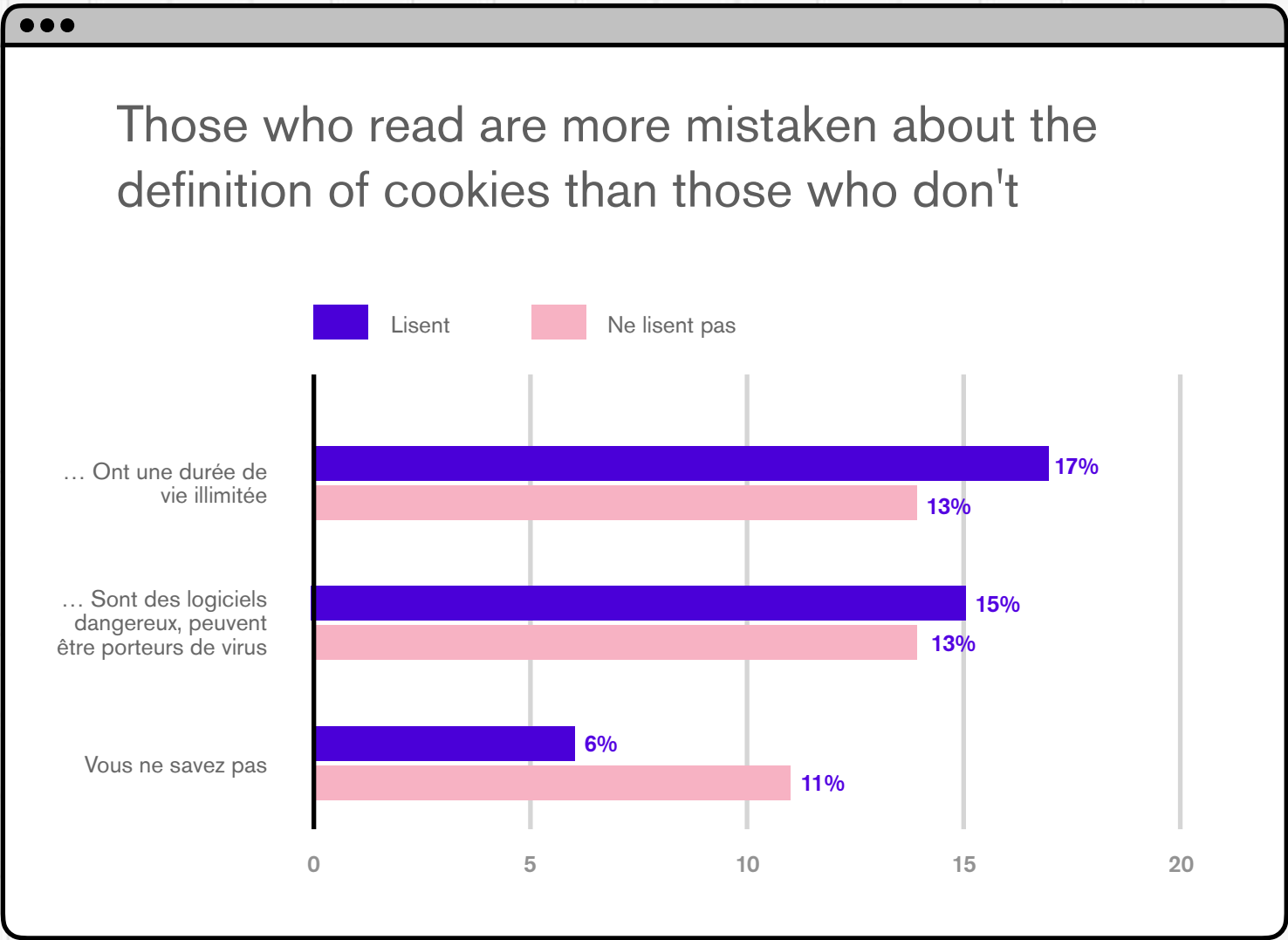
Looking at the journey as a whole, it looks quite linear





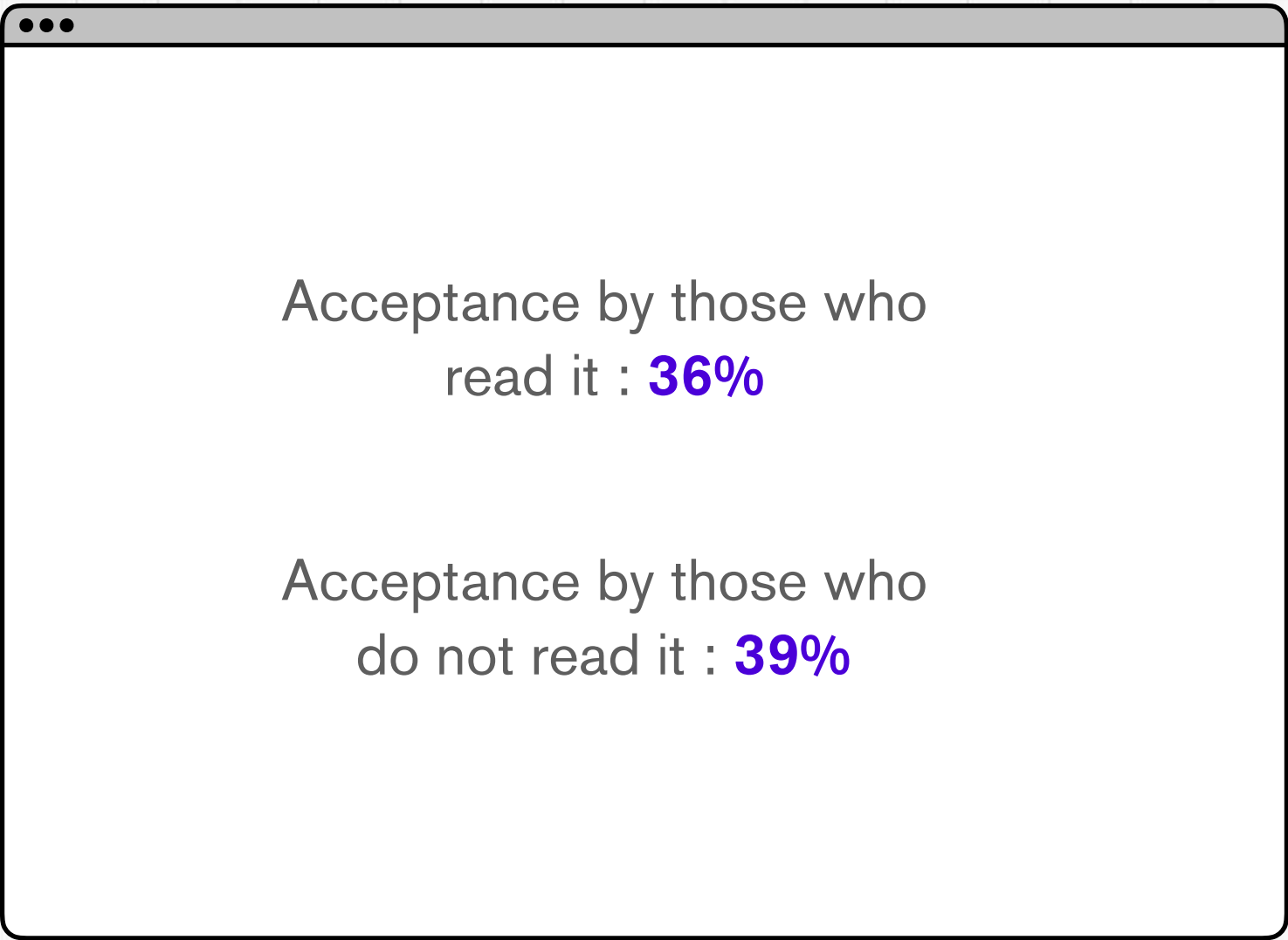
But it is filled with friction points

Reading does not mean a better understanding



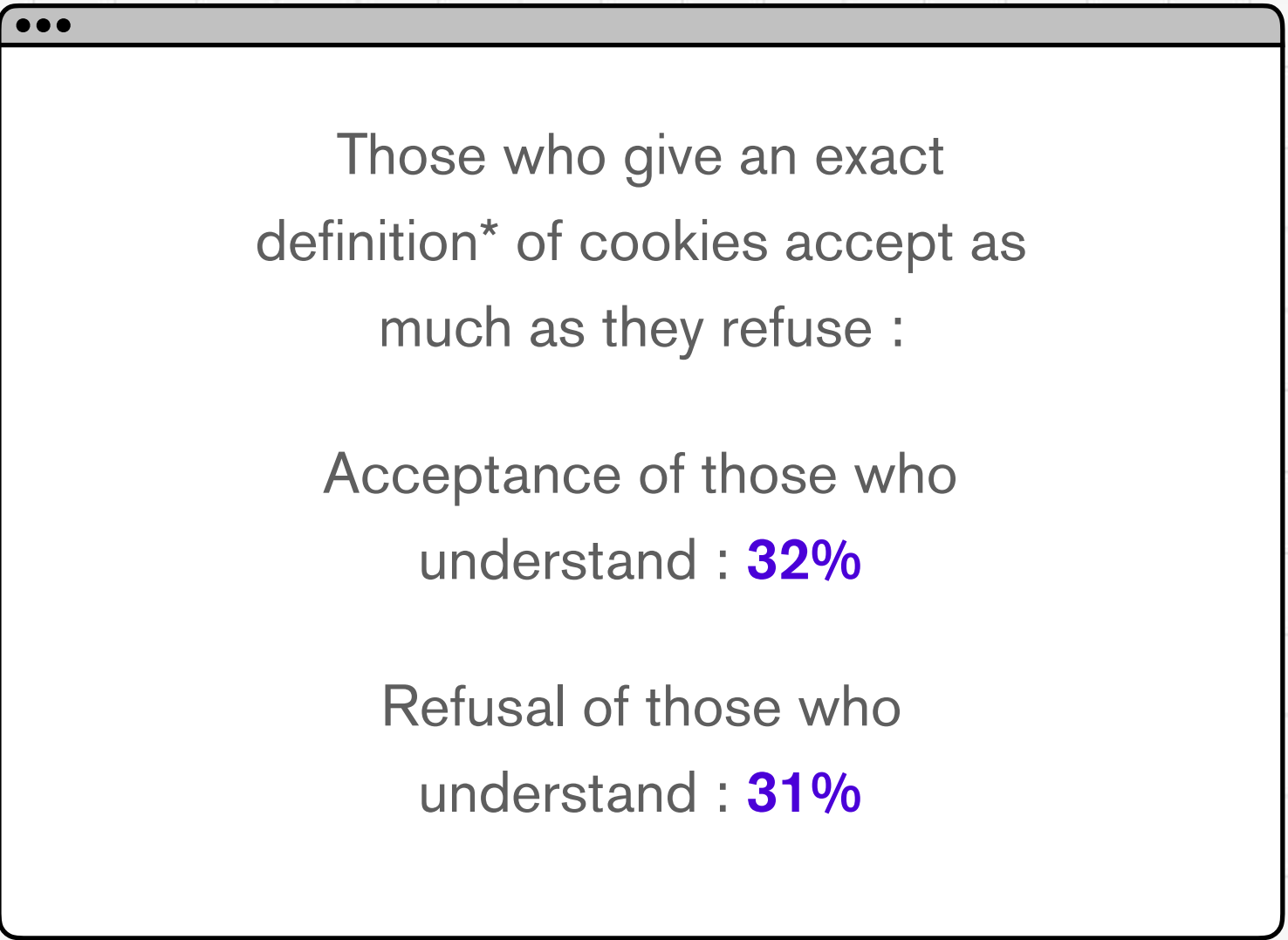
Q13) Which of the following statements do you think best defines what Internet cookies are? There are no right or wrong answers, only your opinion. Multiple answers possible. (n=557) Among people who always or occasionally read the banners. (n=393) Among people who rarely to never read the banners.

Reading does not necessarily encourage acceptance



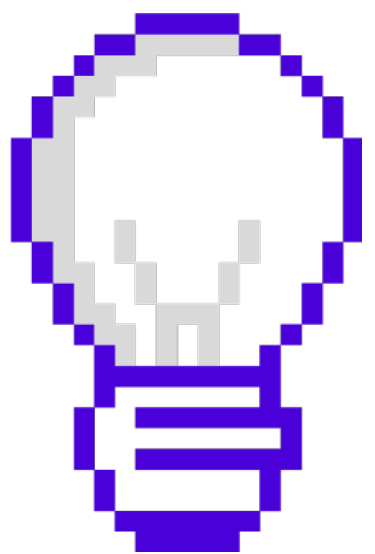
Q18) Generally, what choice do you make when a cookie permission banner appears on your screen? (n=557) Among those who always or occasionally read the banners. (n=393) Among people who rarely to never read the banners.

Understanding does not mean mean accepting more

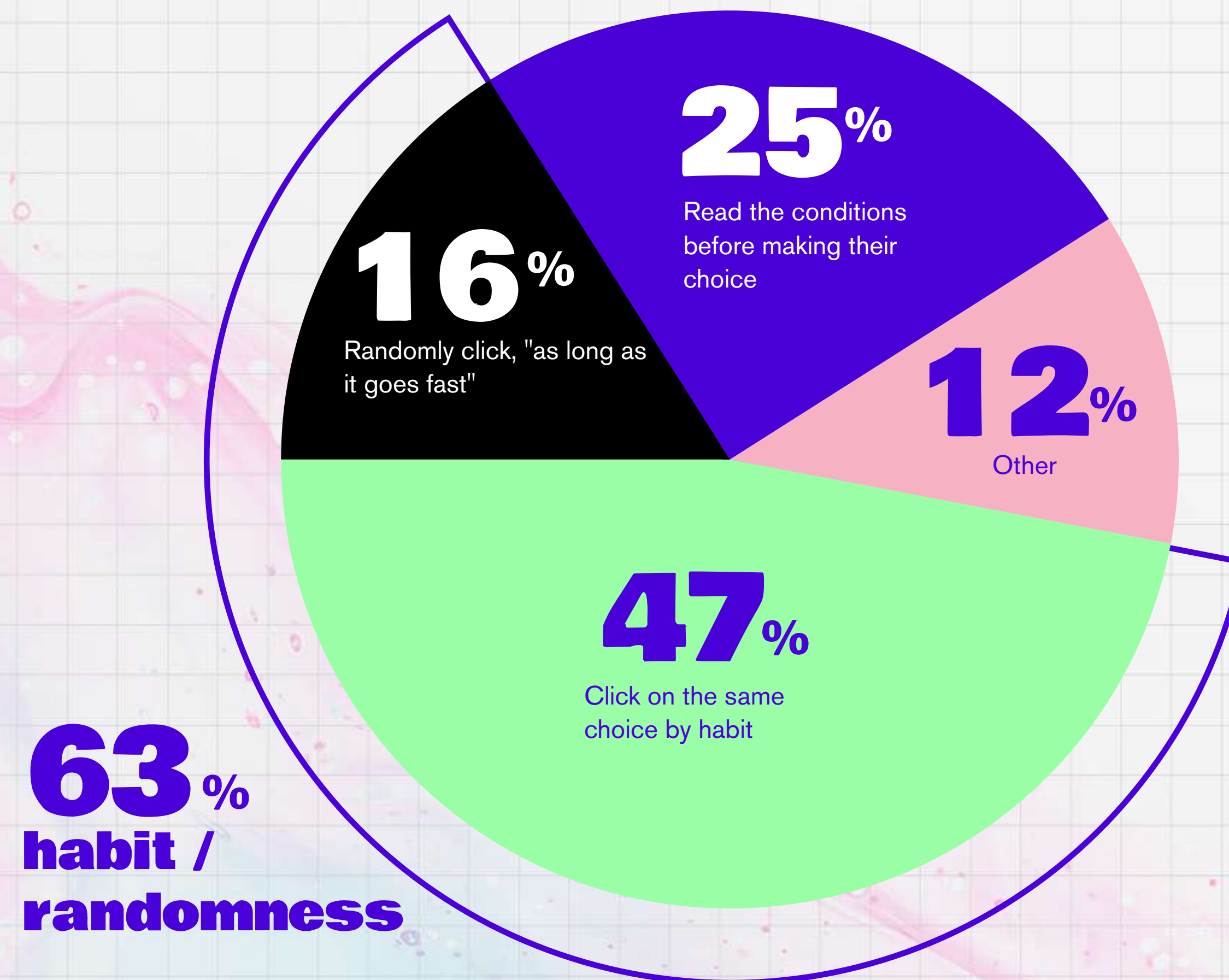


Q18) Generally, what choice do you make when a cookie permission banner appears on your screen? (n=300) Among those who chose the answer "...are text files that are saved by the browser on the hard drive when you go online" to the question "Which statements below do you think best define what Internet cookies are? Multiple answers possible."

**Let's take a look at
the motivations
guiding their choices**



For more than half of the French people, decision making is an automatic process



Q20) What is your reaction when you are presented with a banner showing your choices for allowing cookie sharing?
Only one answer possible. (n=1000)

Refusal

Acceptance

Customization

Those who refuse have clear motivations



Private life



Marketing



Opacity



43%

Do not want their privacy invaded

42%

Do not want to receive ads

42%

Are not interested in sharing their data for marketing or statistical purposes

38%

Do not know what is done with their information

27%

Want to keep some visits private

(1) Q04) Here are some statements about internet browsing habits. Please indicate your level of agreement. (n=1000) (Total Agreement) : I am concerned about the protection of my personal info that I share on the internet. (2) Q01) The following sentences describe different opinions and/or values. There is no right or wrong answer, only your opinion counts (n=1000): I am concerned that private companies will control our country (Total Agreement); I think the current legislation regarding data sharing protects me (Total Disagree); (Total Disagree) I think I have control over my data.

Refusal

Acceptance

Customization

**The first reason why they accept is
the desire to **ease their visits****



41

%

**accept cookies to facilitate
their navigation**

**“We accept to make the window
go away and browse peacefully.”**

Citation panel

65% of those surveyed who agree to the use of their personal data online admit that they have already agreed to the deposit of a tracker without fully agreeing to it, either for convenience or because they did not know how to refuse.

CNIL survey, 2019

Q21) For what reasons do you agree to share your personal data? Multiple responses possible. (n=365) Among those who agree to share their cookies. Top 1 answer

Refusal

Acceptance

Customization

Beyond comfort, brand affinity, trust and frequency of visit seem to have a significant impact

41%

wish to facilitate their
browsing on the Internet

34%

say they accept because
they like and trust the brand
and the website

27%

accept because it is a
website they visit frequently

16%

Accept because of the trust
generated by the request

"as long as the website
asks me, I accept in
confidence".

15%

Accept because it is
important for some
websites, it allows them to
exist

Q21) For what reasons do you agree to share your personal data? Multiple responses possible. (n=365) Among those who agree to share their cookies. Top 3 responses

Refusal

Acceptance

Customization

A third factor seems to influence their choices : **the national origin of brands**

61%

trust French brands more than foreign ones

67%

say they are more concerned about GAFAs than other companies

Q22) Here are some statements about Internet cookie behavior and privacy. Please indicate your level of agreement (n=365) With people agreeing to share their cookies.

Answers to: Regarding the respect of my digital privacy, I trust French brands more than foreign brands (especially American ones); Regarding the respect of my digital privacy and my personal data, GAFA (Google, Amazon, Facebook, Apple...) worry me more than other companies)

Refusal

Acceptance

Customization

French citizens are beginning to perceive the financial value of their data

34%

would accept in exchange
for discounts

33%

would accept in
exchange for an ad-free
experience

25%

would accept in exchange for
exclusive services

26%

nothing would do

NOTE 1 : in France, personal data are
not transferable.

NOTE 2 : Some editors make access to
their content conditional on the
acceptance of cookies or in exchange for
a fee.

Q26) What benefits might make you want to agree to share your personal data via Internet cookies? Multiple responses possible. (n=1000) Top 4 answers: Additional promotions on products; A visit to the site without advertising; Access to exclusive services (free delivery, extended warranty...) ; Nothing.

Refusal

Acceptance

Customization

Among those who customize, not all cookies generate the same level of consent, with third-party cookies falling at the bottom of the list.

**Cookies
required for
the proper
functioning of
the experience**

Native cookies

55%

Cookies related to
performance
measurement

Native / third party
cookies

50%

Cookies for content
personalization

Third-party cookies

43%

Cookies related to targeted
advertising

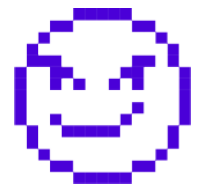
Q23) When you set your choices, what activities do you typically allow or disallow? Mandatory choice for each proposition between "I accept" or "I refuse" (n=181) Among people setting their cookie sharing.

5 segments identified

26 %

The inflexible

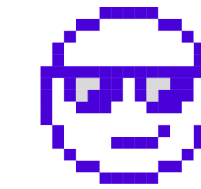
Refuses to share data simply out of habit and because it's faster



28 %

The opportunist

Allows by habit or because it goes fast



18 %

The diligent

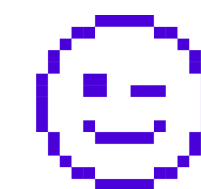
chooses to customize cookies



8 %

The caring

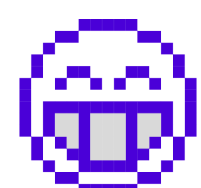
allows after reading the conditions in order to apply a conscientious choice or out of curiosity



20 %

The skeptical

Refuses after reading the conditions in order to apply a conscientious choice or out of curiosity



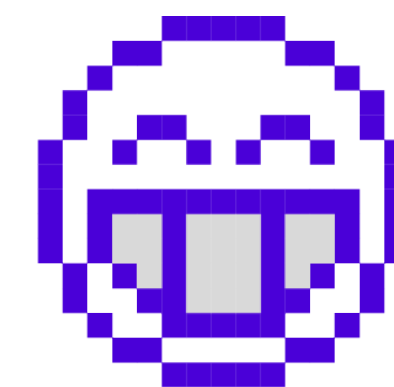
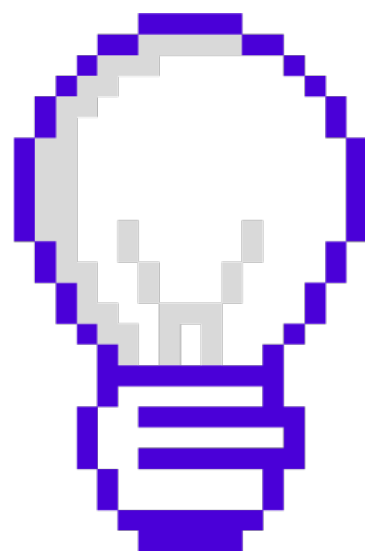
Chooses by automatism / speed

Refuses cookies

Accepts cookies

Conscientious choice / Reading the banners / Curiosity

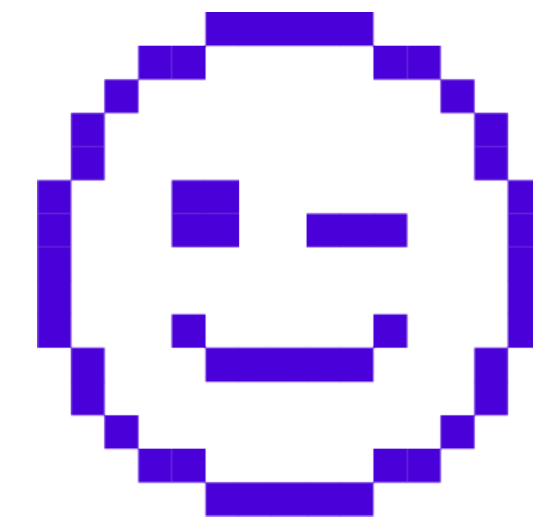
What impact for brands



Which cookie banners
for my websites?



**Make the
banner a lever
of trust and
commitment**



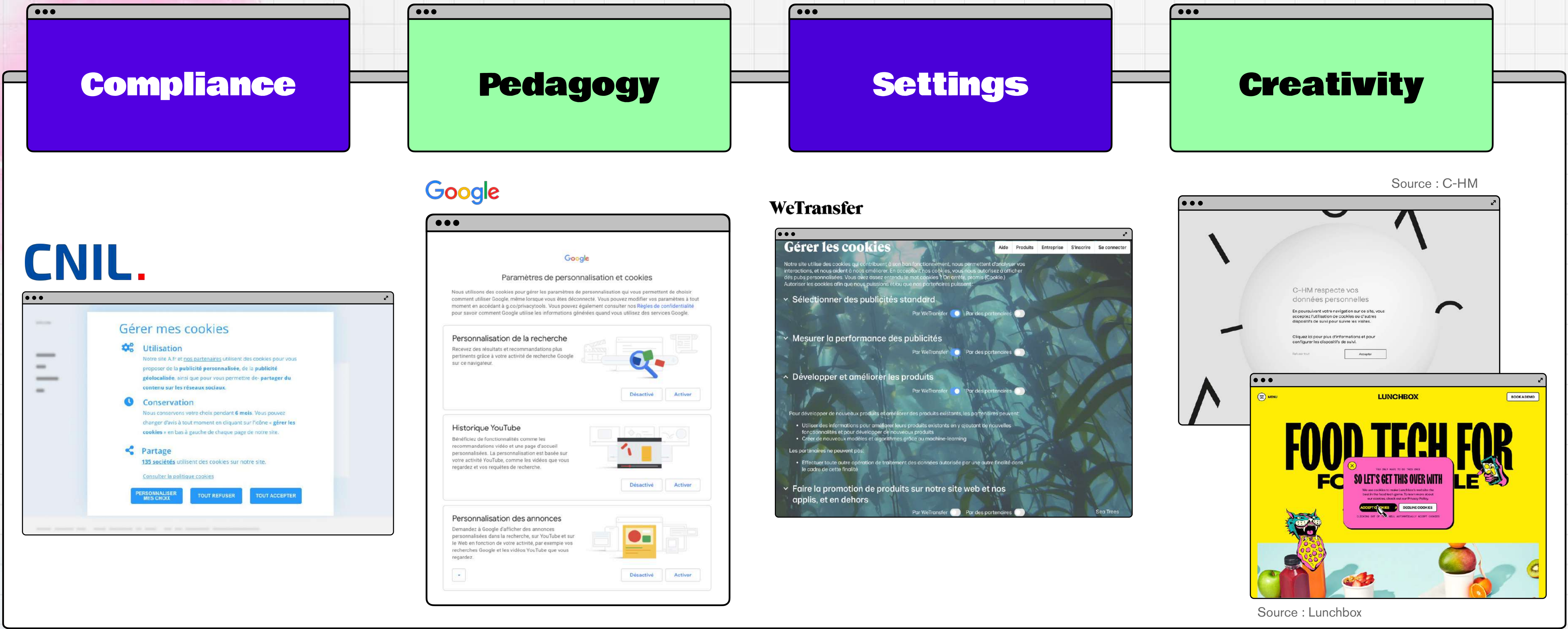
Attention

The following examples are only **inspiration** for consent banners optimization.

They are not legal recommendations. As we will see, not all of them are in full compliance with the CNIL recommendations.

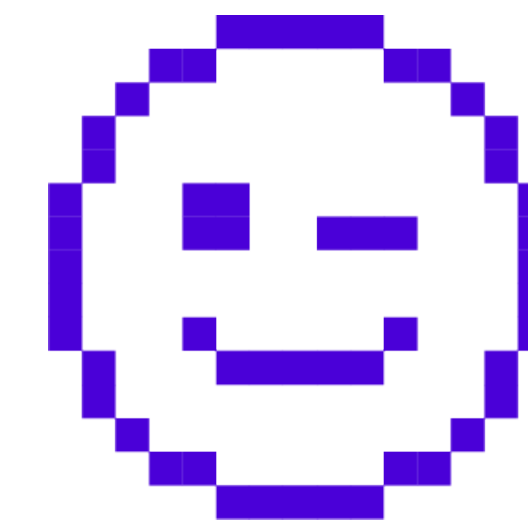
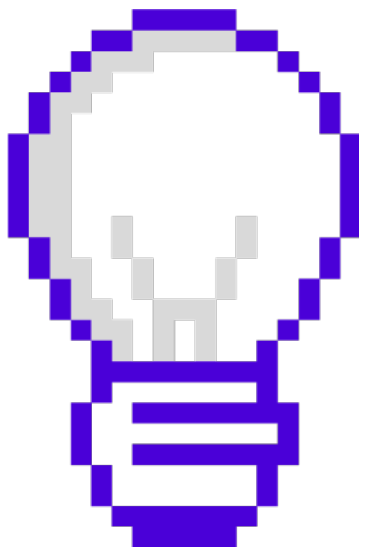
Moreover, it is not excluded that future measures will be taken to homogenize banner practices, even if for the moment, our range of practices is still wide.

4 pillars for more engaging cookie banners



How do I keep measuring my
websites performance ?

Evaluate analytical tools under a new prism



2 questions arise regarding performance measurement : 2 different subjects, not directly related

A. CNIL's exemption

Regain the exhaustivity of statistical performances with consent-exempt solutions

B. CNIL's order

Respond to the potential risks of CNIL sanctions and orders, for managers using Google Analytics

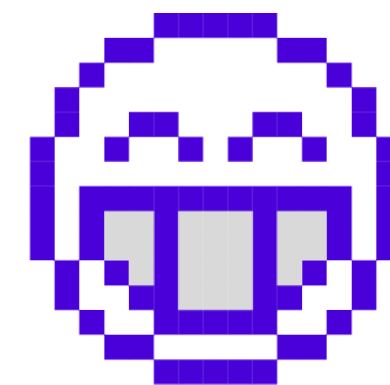
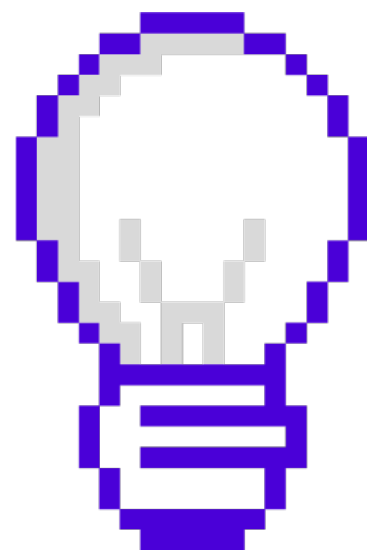
Think about the most appropriate solution(s) to choose with your performance and legal teams

Discussion highlights

- ◆ Consent exemption (100% of visits analyzed)
- ◆ Easy connection to other tools currently used or native ecosystem (Technology Marketing stack, AB testing tool, AdServer, native dashboarding...)
- ◆ Handling and intuitiveness of the interface
- ◆ Financial investments (price, business model...)
- ◆ Community and support...

What future for my digital marketing in a world without third-party cookies?

Renew your digital value proposition to deserve users' consent



With the end of third-party cookies, usages and consent will go through a combination of cookies first & persistent unique identifiers

Today

**Cookies
3rd party**

The industry will go from a 3rd party cookie identifier that could be exchanged and synchronized between technologies to...



Tomorrow

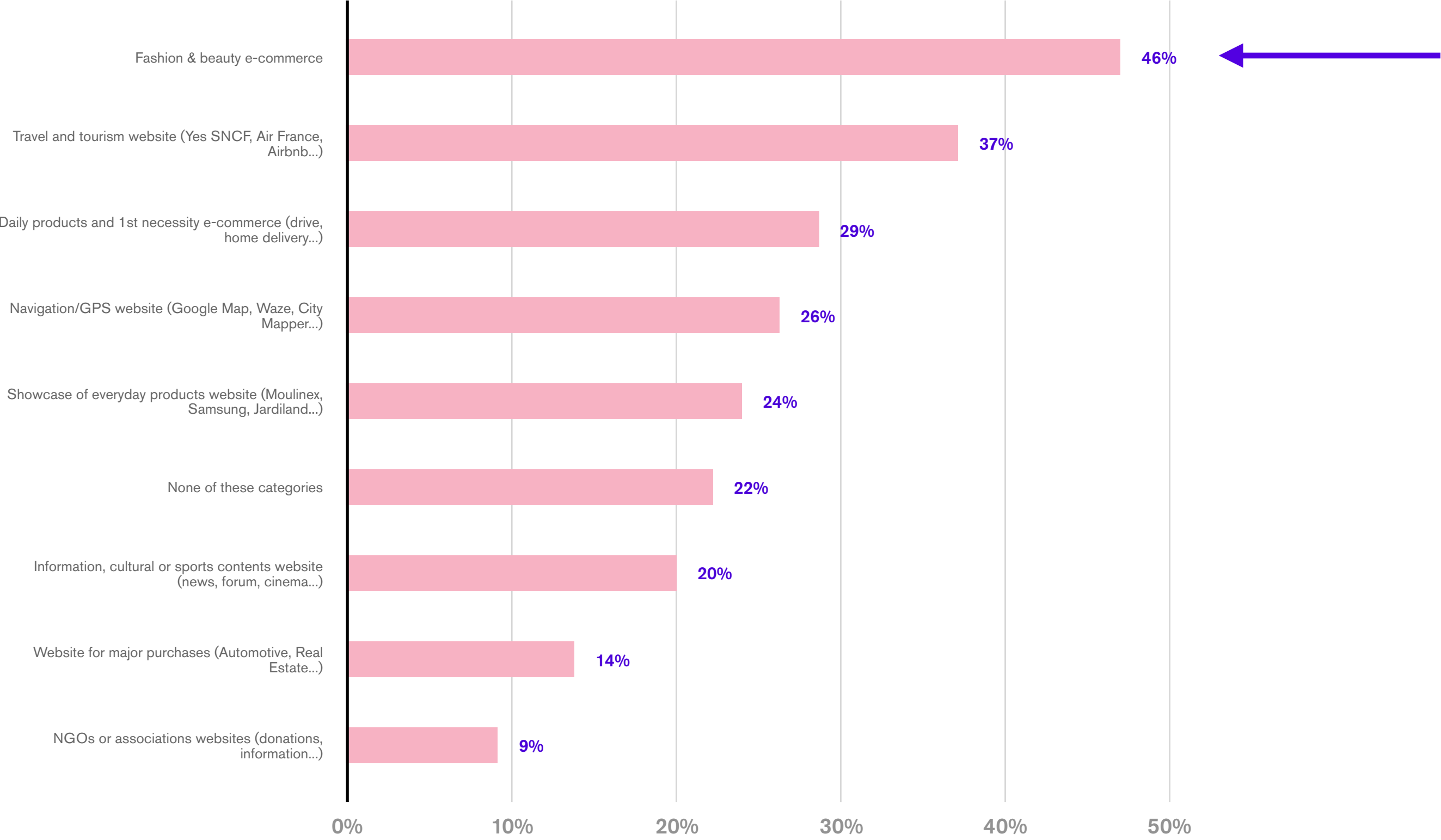
**Cookies
1st party**

**@
Persistant
Identifiers**

... a combination of identifiers between 1st party cookies and an individual persistent identifier : the Email.

Consumers are not ready to give-up their email to any brand, to any website...

Today, only e-commerce
sites seem to be doing
it well.

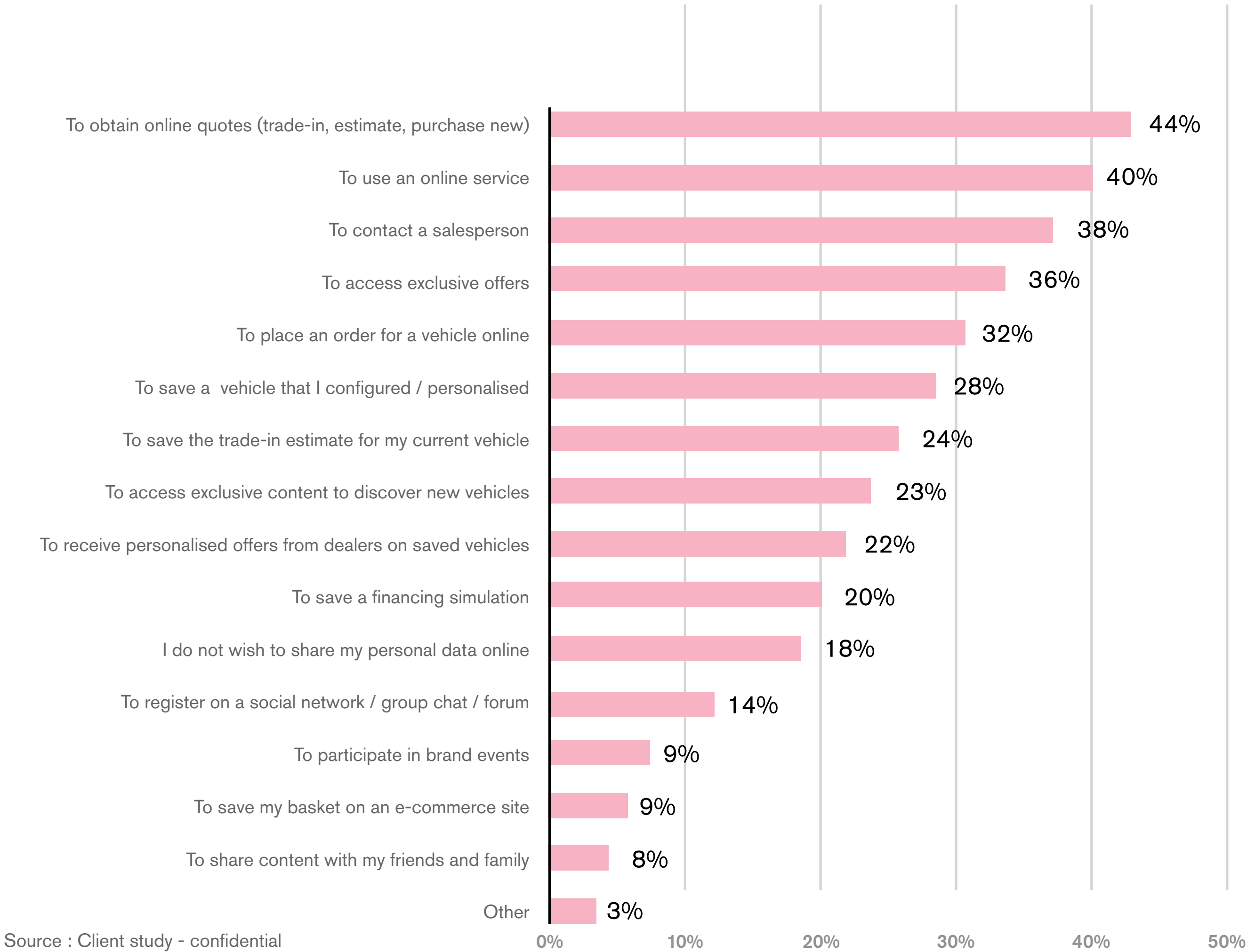


Q30) For which categories have you already created a personal account, on your own initiative i.e. without any obligation from a site, to access content? Several answers are possible.

A according to our audiences, some services are more deserving than others when it comes to consent and data sharing

Which services would you be more willing to share your personal information with (before purchase)?

Automotive market focus



To identify these services, we have an arsenal of first party data at our disposal.

But this data is still highly siloed by department and disconnected from digital creativity.

Marketing

- ✦ Studies
- ✦ Business results

Digital

- ✦ SEO
- ✦ Social data
- ✦ User tests
- ✦ WebA

Market Intel.

- ✦ Quanti/quali
- ✦ Ethnos

CRM

- ✦ Customer data

Retail

- ✦ Shopping behaviors

Aftersales

- ✦ Call centers
- ✦ Chats
- ✦ Chatbots



Digital creativity



Data

At the service

Of creativity

Data

At the service

Of creativity

**For more informations, please contact :
marketing@razorfish.fr**