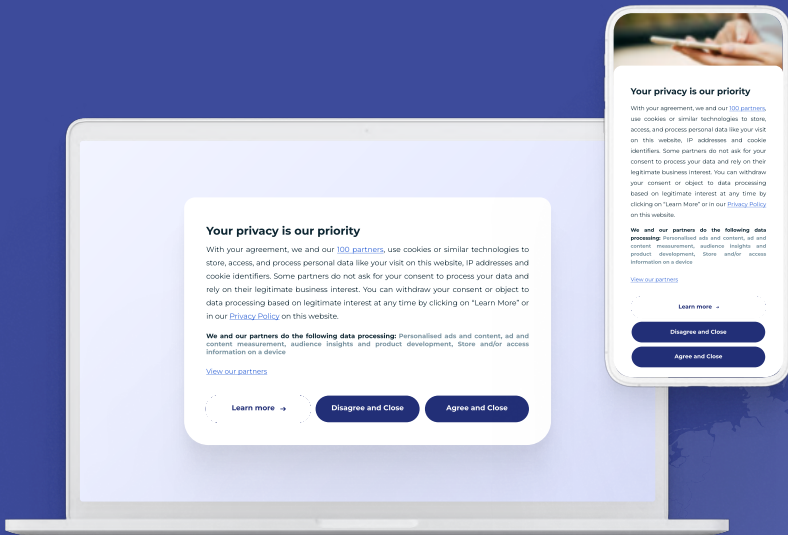# DIDOMI

DATA PRIVACY *Benchmark*

Consent collection in Europe in 2024

"

2023 was a major year for data privacy, and 2024 is gearing up to be even more exciting.

Last year, the team at Didomi released Global Privacy UX Solutions, our updated offering covering more use cases to better serve our customers and, more than ever, be at the forefront of Privacy user experiences globally.

This happened against the backdrop of an eventful year for our industry. Artificial Intelligence raised major questions about privacy, IAB Europe introduced its Transparency and Consent Framework V2.2, and Google came up with major privacy updates ahead of its planned third-party cookie deprecation.

Didomi was present every step of the way, releasing product updates, organizing events, and producing valuable content to help our customers, partners, and collaborators make sense of what can sometimes be an overwhelming industry.

This is also the purpose of this yearly benchmark.

In 2024, the trends from the past few years are set to pick up speed. In this paper, we bring consent collection to the forefront again by sharing exclusive, proprietary insights on the best practices in the market per industry, location, consent banner format, and more. This edition also introduces data on hot topics like Google consent mode and cookie walls, which will be important talking points in the coming months.

We hope you find it interesting and are looking forward to spending another year of data privacy together.

Romain Gauthier,
CEO and co-founder at Didomi

Executive summary

2024 marks a period of stability for consent collection performance, as local regulation applications and practices start maturing and yielding consistent results.

Despite this stability, variations persist across European countries, largely attributable to differences in consent banner format distribution.

Indeed, consent banner format emerges as the primary determinant influencing consent rates. This finding underscores the significance of how information is presented to users, suggesting that the design and clarity of consent banners play a crucial role in user decisions.

Table of Contents

Glossary and key concepts

Didomi collects events through the SDKs deployed on web properties (websites, mobile apps, privacy Centers, etc.) and provides aggregated analytics in the Didomi Console.

Understanding how privacy impacts organizations across all digital activities is critical. Before taking a closer look at the data, let's ensure we understand the main privacy indicators at play.
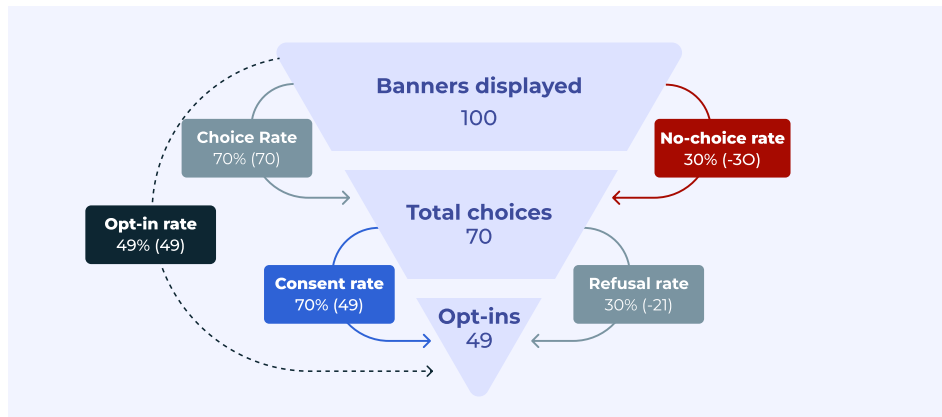
Consent rate

The consent rate provides the percentage of users who have given consent (opt-in) over all the users who have replied to the consent notice.

Choice rate

The banner choice rate is the percentage of choices given (opt-in or opt-out) over the total number of banners.

No-choice rate

The no-choice rate is the percentage of consent banners displayed that were not answered to.

Opt-in rate

The opt-in rate is the number of opt-ins divided by the number of banners displayed. It gives the percentage of users who gave their consent

Cookie wall

A cookie wall is a mechanism that allows you to block access to certain content or services in your website or app if the user has not consented to cookies.

Consent rate vs Opt-in rate

We describe all the differences between the consent rate and the opt-in rate in this dedicated article here.

Refusal rate

The refusal rate is the number of opt-outs divided by the number of banners displayed. It gives the percentage of users who replied negatively.

Overview of the main metrics

- **Consent rate** provides the most consistent indicator regarding the ability of a banner to generate user opt-ins
- **Opt-in rate**, on the other hand, has a higher variability because the indicator can be affected by traffic with a high bounce rate, such as a display campaign. Also, the opt-in rate can vary a lot according to the format of your banner. For example, a mix of pop-in and footer consent banners would make it more difficult to read and analyze performance across environments.

For the purpose of this whitepaper, we will focus on three key metrics: **consent rate**, **no-choice rate**, and **opt-in rate**.
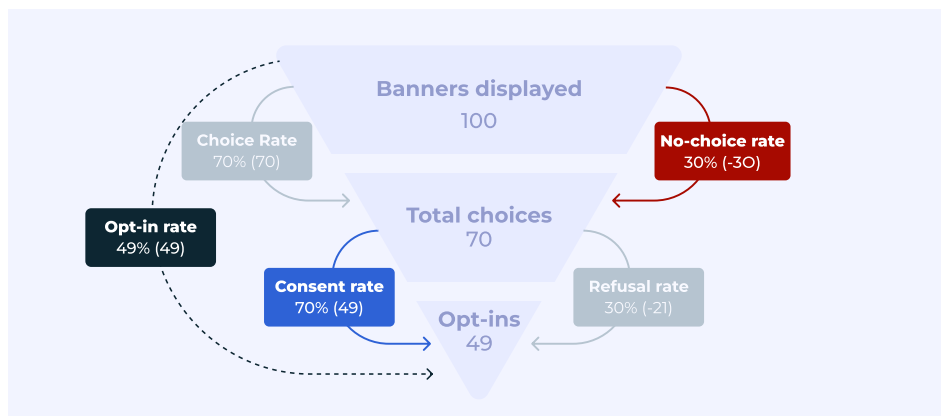
Why do consent rates matter?

Why is obtaining a good consent rate important for your organization in the first place? Beyond compliance with data privacy regulations, collecting informed consent from users is critical for several areas of your operations:

- **Analytics and digital campaign performance measurement,** as a result of incomplete or missing data
- **User experience improvement,** since a high volume of opt-outs will jeopardize your ability to perform A/B testing
- **Product development,** due to limited insight into user behavior and preferences, makes it more difficult to make informed decisions
- **Monetization and financial performance,** as a high opt-out rate, can limit the ability to run targeted ads and personalized content.

A brief word about Didomi

Didomi helps organizations implement great Privacy User Experiences that respect choices and give people control over their data.

Our Global Privacy UX Solutions are designed to solve today's data privacy challenges, such as multi-regulation consent management, privacy governance, and the need to provide self-service user privacy journeys supercharged by flexible integrations, high-grade security standards, and premium support services.

Thousands of companies work with Didomi to collect billions of consent and preference data points, monitor vendor and tracker activity, reduce compliance risk, and engage their users with highly personalized, privacy-first experiences that build trust and loyalty.

Learn more at didomi.io

2024 BENCHMARK

Consent in Europe

Our Consent Management Platform (CMP) is recognized as the leading CMP by software review website G2 and is deployed on over 29k websites & apps (web, mobile, CTV and AMP). This allows us to gather, aggregate, and crunch many numbers to paint a picture as comprehensive as possible of the state of consent collection in 2024.

The data in this whitepaper was collected between January 1st, 2023, to December 31st, 2023.

a. General overview of consent rate, no-choice rate & opt-in rate
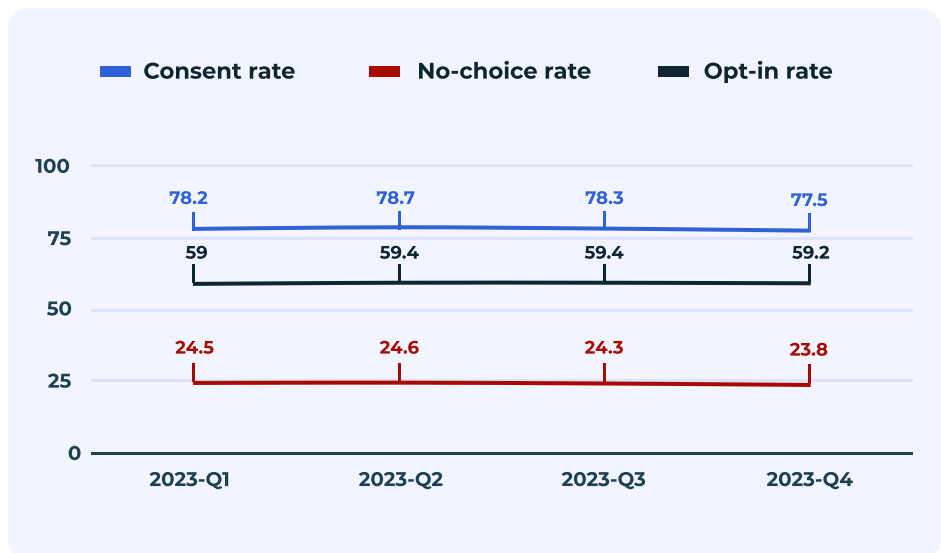
We observed a steady performance throughout the year, with the consent rate consistently hovering around 78%. Similarly, the no-choice rate remained stable at approximately 24%, and the opt-in rate at 59%.

b. Performance by technical environment

SDK Type	Web	Mobile	CTV	AMP
Consent rate	78.3%	77.8%	76.3%	74.0%
No-choice rate	24.0%	19.7%*	18.4%	34.7%
Opt-in rate	59.5%	67.3%*	62.5%	48.5%

We noticed minor fluctuations in consent rates across different technical environments. On the other hand, **no-choice rates exhibited significant variability, ranging from 18.4% to 34.7%.**

While web environments showed a marginally higher consent rate than mobile and CTV platforms, they also recorded a higher no-choice rate, adversely affecting the opt-in rate, which, in turn, ended up being lower for web than CTV and mobile. This increased no-choice rate in web environments can be attributed to a less engaging nature for users.

Lastly, AMP environments stand out as having the lowest performance for all three indicators.

c. Performance by device (web only)

Device Type	Consent rate	No-choice rate	Opt-in rate
Desktop	76.9%	23.3%	59.0%
Smartphone	80.3%	24.2%	61.0%
Tablet	72.4%	25.4%	53.9%
Television	74.5%	25.0%	55.5%
Phablet	77.4%	24.5%	58.7%
Other *(console, car, camera, smart display)*	83.3%	37.6%	52.2%
Range	*72.4% to 83.3%*	*24.2% to 37.6%*	*52.2% to 61.0%*

These figures only cover web consent banners that can be read on most devices.

d. Performance by region (Europe only)
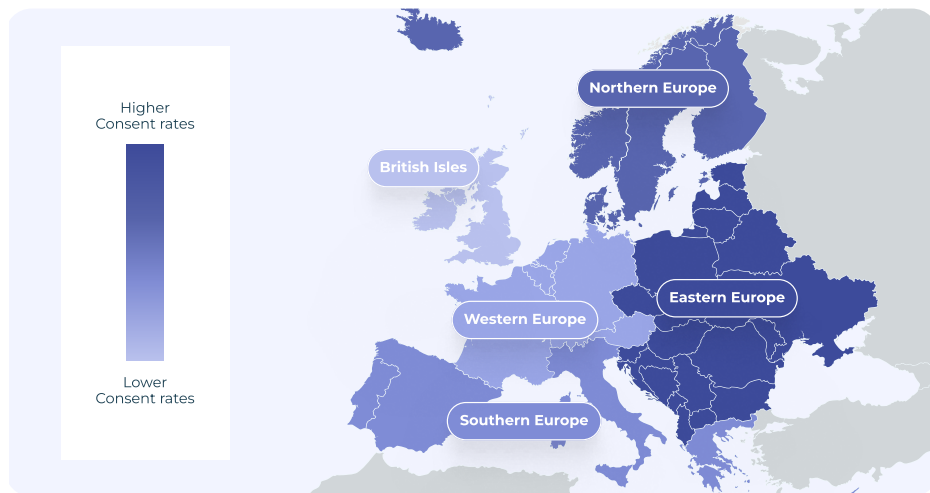
As you can tell by how this whitepaper is going, we love crunching numbers and looking at data. However, it's important to remember that a lot must be taken into account when considering these large datasets and how to interpret results.

When looking at performance in specific locations, **keep in mind that local culture, data protection maturity, and legal context play a major role in consent banner performance.** Users are not familiar with consent banners in some places, while on the other hand, consent fatigue from overexposure to banners is prevalent in others.

Country	Consent rate	No-choice rate	Opt-in rate
Eastern Europe	88.6%	28.6%	63.7%
Northern Europe	88.3%	23.6%	67.3%
Southern Europe	87.4%	25.4%	65.3%
Western Europe	84.3%	21.4%	66.4%
The British Isles	84.2%	27.5%	61.3%
Range	*84.2% to 87.4%*	*21.4% to 28.6%*	*61.3% to 67.3%*

The outcomes for the three indicators are largely uniform, with variations primarily attributed to the differing distribution patterns of the various consent banner formats.

e. Performance by industry

Industry	Consent rate	No-choice rate	Opt-in rate
Entertainment & Leisure	83.6%	30.0%	58.7%
Travel & Transport	81.7%	23.0%	63.1%
Fashion & Jewelry	81.1%	22.8%	63.0%
Beauty & Cosmetics	80.8%	26.2%	60.0%
Food & Beverages & Consumer staples	80.8%	29.0%	57.5%
Automotive	80.2%	19.6%	64.5%
Gaming & Sports	78.5%	22.4%	60.9%
Media & Publishers	77.9%	24.1%	59.2%
Home equipments	77.5%	29.0%	54.9%
Healthcare & Pharma.	77.4%	24.1%	58.4%
Real estate	76.3%	24.7%	57.3%
Services	75.9%	24.1%	57.8%
Finance & Insurance	74.3%	25.8%	55.3%
Energy & Utilities	73.2%	23.8%	55.7%
High tech & Telecom	72.8%	36.1%	45.6%
Public Sector & Charity	72.6%	22.2%	56.4%
Range	*72.6% to 83.6%*	*19.6% to 30.0%*	*45.6% to 64.5%*

Previous year data available here

Some of the factors that can influence these numbers include:

- **Local regulations:** Even though the GDPR has helped a great deal to unify data privacy regulations throughout Europe, the various interpretations of the law can influence consent metrics from one country to another.

- **Our data:** Our database reflects the practices and rates of our clients and is limited to the extent of our dataset. While we collect billions of consent choices every year, this is still something to be aware of.

- **Favored consent banner format:** As we will see later in the whitepaper, the format of a consent banner can dramatically impact its performance. Local regulations, culture, and consumer habits influence the prominence of certain formats in certain areas, thus impacting average performance rates.

Despite the relatively small size of the European market, numbers vary greatly, from Belgium, where the consent rate averages 86.7%, to France, which boasts (again) the lowest average opt-in rate in Europe at 54,8%.
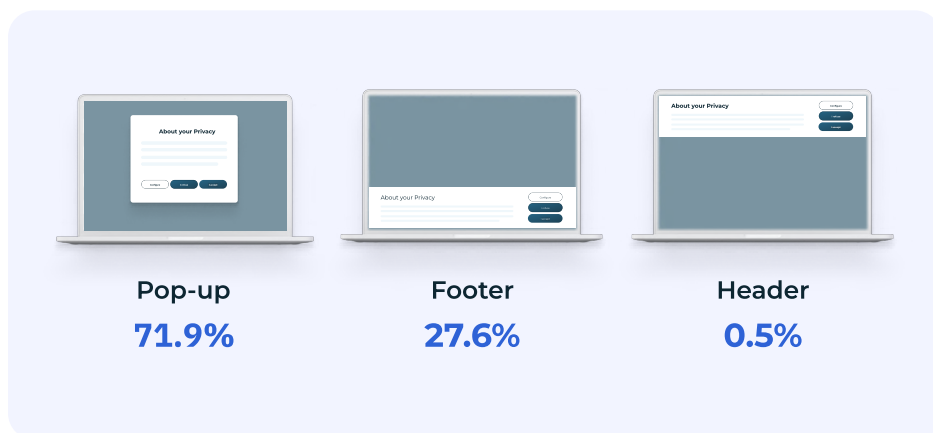
Please keep this in mind when looking at the data.

Consent banner format performance

In this section, we take a look at the most popular banner implementations in our datasets before looking at the best-performing format.

What are the most common banner formats by position?

| Pop-up	Footer	Header
71.9%	**27.6%**	**0.5%**

In Europe, the pop-up format is favored due to the GDPR default opt-out regulation, which mandates the collection of user consent before most data-gathering activities can start.

By design, the pop-up format interrupts the browsing experience, thereby encouraging users to make a decision. This approach results in higher opt-in rates compared to formats that do not have a built-in incentive for users to make a choice.

When footer and header consent banners do interrupt browsing, their effectiveness closely mirrors that of the pop-up format. However, when they allow free use of the website, the no-choice rate will naturally significantly increase, and heavily impact opt-in rates as a result.

What are the most common options displayed to refuse consent?

	Link only		No negative action
	35.9%		**36.4%**
	Button only		Button + Close button
	27.0%		**0.4%**
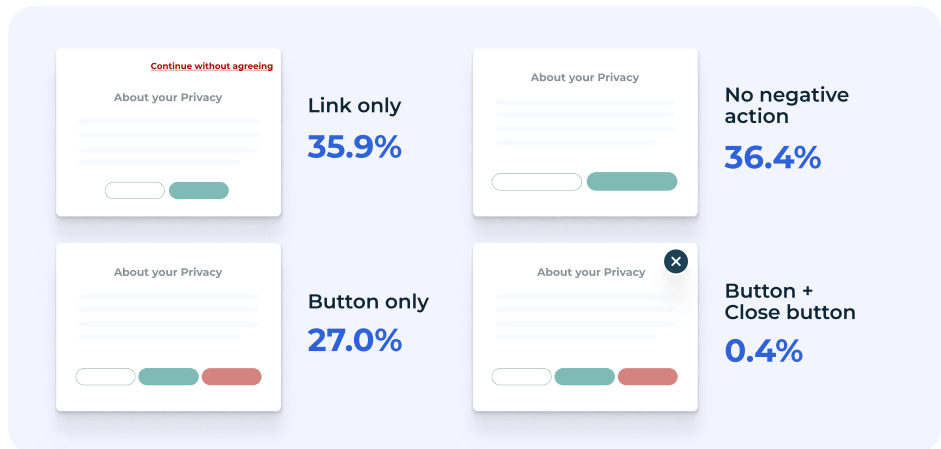
In the illustration above, we are using a pop-up consent banner for the sake of our visual. However, please note that every refusal option (link only, no negative action, button only, and button + close button) can seamlessly integrate into any banner style, including footer and header formats.

Performance

| Negative action	Consent rate	No-choice rate	Opt-in rate
No negative action	94.1%	19.5%	75.9%
Link only	81.2%	23.3%	62.3%
Button only	77.6%	30.1%	54.8%
Button + cross	73.8%	27.9%	49.4%
Cross only	68.7%	32.0%	45.8%
Range	*68.7% to 94.1%*	*19.5% to 32.0%*	*45.8% to 75.9%*

Previous year data available here

What is the best consent banner format?

Based on the billions of consent points collected by Didomi customers using our CMP in 2023, the best-performing consent banner is a center page pop-up that pauses navigation until consent is collected.

Although other formats have shown similar results in terms of consent rates, the volume of users not interacting with the banner (no-choice rate) drastically increases if the banner allows browsing without committing to a choice - whether positive or negative.
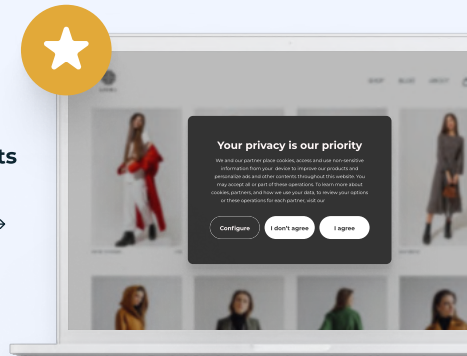
This directly impacts the volume of consent collected and, therefore, on the measurement and deployment of marketing initiatives.

Consent is Optional
No-choice rate **between 40% and 70%**

Consent is Required
No-choice rate **between 23% and 32%**
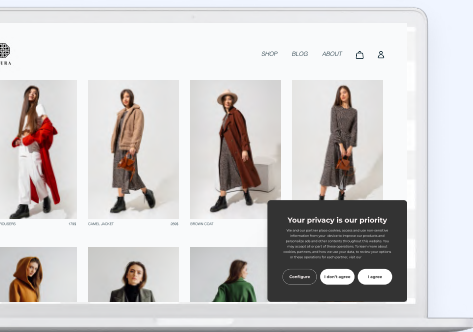
No-choice rate **decreases** between **-17 points and -38 points**

Dive deeper with our interactive consent rate benchmark

To learn more about consent banner performance based on format, industry, options, and more, head to our free interactive consent rate benchmark:
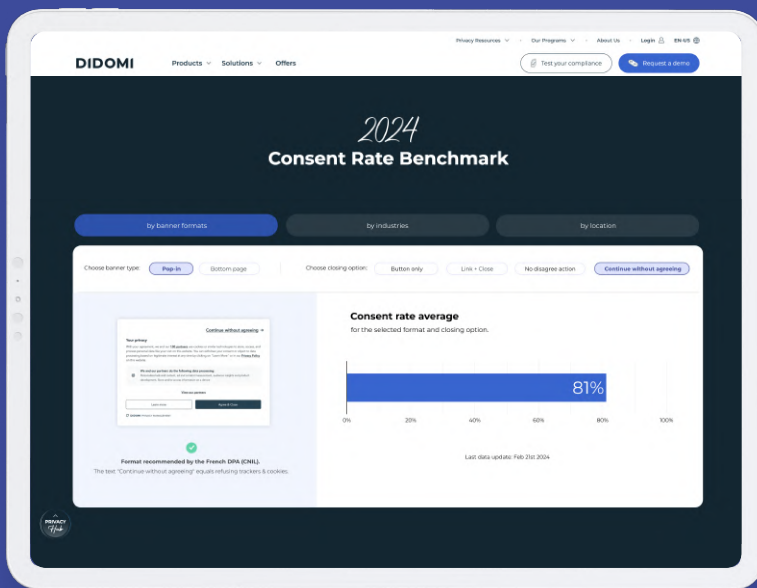
Discover our interactive benchmark

Industry trends and alternatives

From frameworks to alternatives to cookies, the data privacy industry is moving quickly to address the impending phasing out of third-party cookies in Chrome and the challenges of effective monetization online.

This year, we want to highlight three specific trends that were decisive in 2023 and will continue to profoundly impact the digital ecosystem in 2024: Google Consent Mode v2, IAB Europe's Transparency and Consent Framework v2.2, and cookie walls.
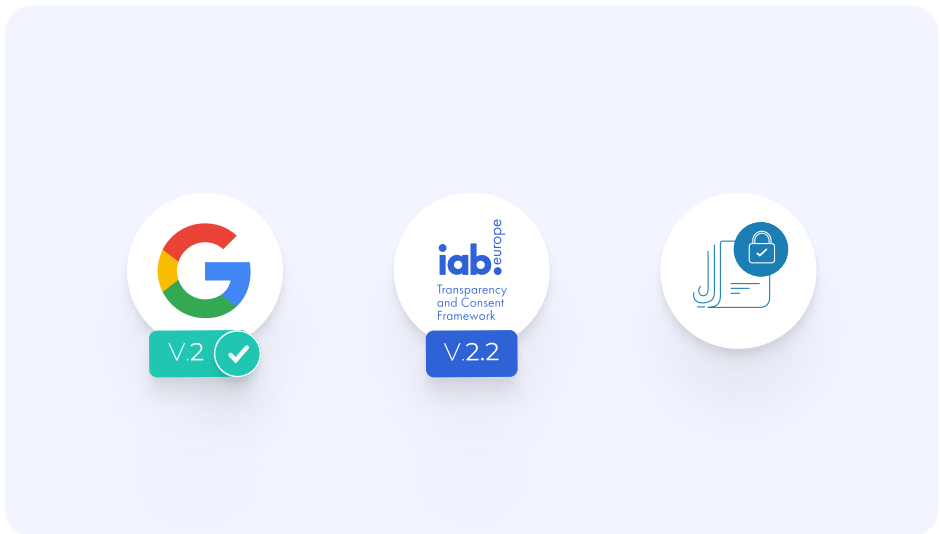
Google Consent Mode v2

At a high level, consent mode is Google's mechanism to help organizations detect user consent signals and adjust Google tags accordingly. It helps make up for lost data by filling the gaps using conversion modeling. A typical consent mode scenario will look something like this:

Google Consent Mode *Basic*

User visits a website or an app

Tags are blocked until the user interacts with the consent banner

NO CONSENT — CONSENT BANNER — **CONSENT**

No data is sent

Conversion modeling
General model

Tags are triggered to read/write cookies for ads and analytics purposes

Measured conversions

Google Consent Mode *Advanced*

User visits a website or an app

Tags are blocked until the user interacts with the consent banner

NO CONSENT — CONSENT BANNER — **CONSENT**

Cookieless pings are sent

Conversion modeling
Advertiser-specific model
(more detailed)

Tags are triggered to read/write cookies for ads and analytics purposes

Measured conversions

As of 2024, the number of consent banners using consent mode is significant, making the solution the most popular tag manager, a trend that is bound to continue growing with the release of the new iteration of the feature, along with new requirements from Google regarding its implementation.

Google started enforcing its EU User Consent Policy (UCP) for audience and measurement solutions in March 2024. To make sure to maintain performance, advertisers are required to upgrade to Google Consent Mode v2.

Learn more about Google Consent Mode V2 and Google updated requirements on our dedicated page.

Transparency and Consent Framework (TCF) V2.2

In 2023, IAB Europe introduced a new iteration of its Transparency and Consent Framework (TCF) to address some of the criticism put forth by data protection authorities in the past years.

Changes that were implemented included:

- **Removal of 'legitimate interest'** as a legal basis for some Purposes

- Addition of Purpose 11 to **enhance users' content experience**

- **More descriptive names and explanations** of Purposes and Features to aid user understanding

- **Standardization of additional information about Vendors** to improve transparency:

  - Mandatory disclosure about the number of Vendors in the first layer of the CMP

  - Mandatory disclosure of additional Vendor information in the second layer of the CMP

- Specific requirements to **facilitate users' withdrawal of consent**
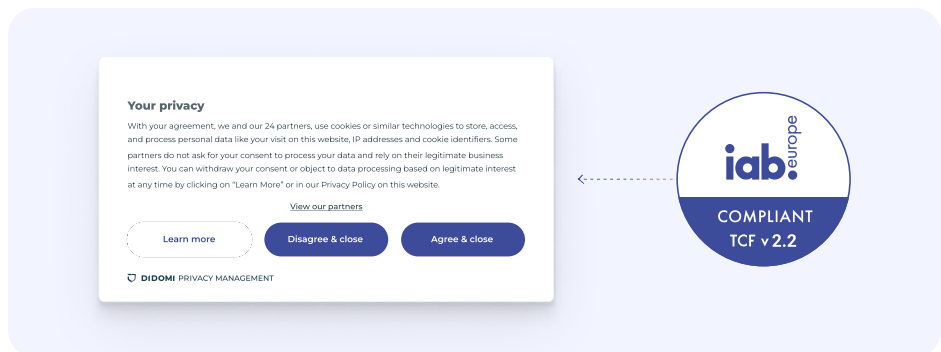
We have been actively involved in developing the TCF v2.2 with the IAB, and have been working closely with customers and partners participating in the TCF to ensure a smooth transition to the latest version of the framework, and have monitored the impact since the November 20th, 2023 deadline.

We've measured consent rate variation for banners that have migrated from TCF v2.1 to TCF v2.2. The average number of vendors in our sample is 166.

These are some of the biggest changes in the latest iteration of the framework:

BANNER CONSENT RATE VARIATION FROM TCF V2.1 TO TCF V2.2

Total volume of choices: **300M** | Banners in the sample: **+300**

Average	Median
0.02%	**-0.08%**

The median consent rate variation after the migration from TCF V2.1 to TCF V2.2 is -0.08%.
Period of the study: Oct. 1, 2023 to November 17, 2023

> **"**
>
> *As of December 2023, after evalutating 1.5K TCF V2.2 consent banners with 126M consents collected, we have not been able to make any correlation between the volume of vendors and the notice performance.*
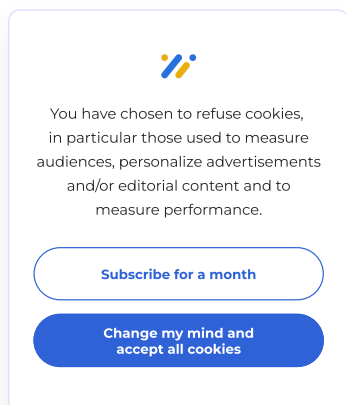>
> **Quentin Marques**
> Head of Data at Didomi

To learn more about the TCF, head to our dedicated page

Paywalls and cookie walls

Digital media pure players are the first impacted, business-wise, by consent collection. In order to educate their users about the stakes of opt-in collection and to maintain access to free information, some of these organizations have started implementing cookie walls.

You have chosen to refuse cookies, in particular those used to measure audiences, personalize advertisements and/or editorial content and to measure performance.

Subscribe for a month

Change my mind and accept all cookies

What is a cookie wall?

A cookie wall is a mechanism used primarily by publishers who block access to some content or services on their website or app if the user has not given consent for cookies.
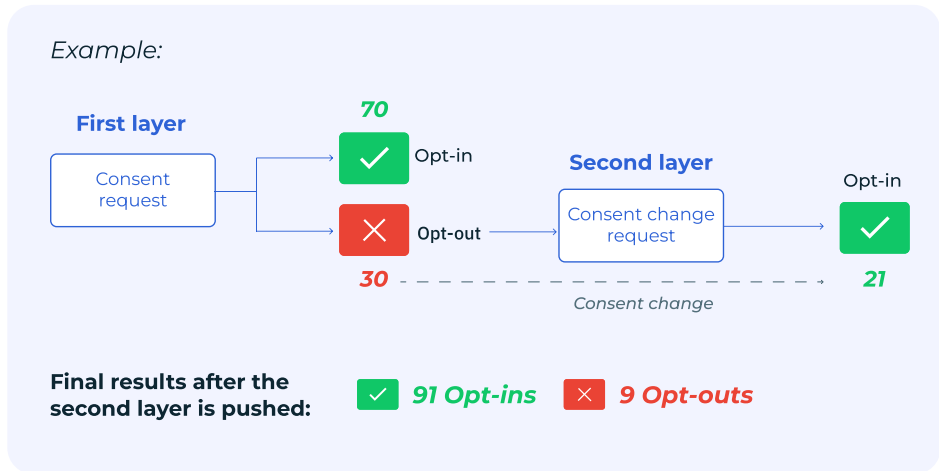
Partners of Didomi, such as Poool and Qiota, are integrated within our Consent Management Platform to help publishers implement this sort of setup.

Important note: While legal in some jurisdictions at the time of writing this whitepaper, the legality of cookie walls is under review. Meta is currently under scrutiny over implementing a subscription model in Europe requiring users to pay to opt out of targeted advertising.

The case against this model coined "Pay or Okay" by advocacy group NOYB (which sued Meta over it), will seal the deal over whether cookie walls are considered legal or not.

Hear more from our Chief Privacy Officer **here**.

How does a cookie-wall work?

Example:

First layer

Consent request

70
✓ Opt-in

✗ Opt-out

Second layer

Consent change request

Opt-in
✓

30 - - - - - - - - - - - - - - - - - - - → **21**

Consent change

Final results after the second layer is pushed: ✓ **91 Opt-ins**   ✗ **9 Opt-outs**

In this example: 70 visitors gave their consent (opt-in), and 30 denied consent (opt-out) on the consent choice request. The consent change request layer is then pushed to the visitors that have opted out.

When presented with this second layer, 21 visitors changed their opt-out to an opt-in (change rate: 73%). Thanks to the cookie wall, the consent rate in this example has increased by 30% - from 70% on the first layer to 91% on the second layer.

Results of cookie wall impact

Opt-outs changed to opt-ins

From 50% to 70%

**Consent Rate increase**

From +5% to +22%

Based on our data, cookie-walls will improve performance in comparison to a standard opt-out option (button) banner. Performance can vary according to the cookie wall implementation and the original banner performance.

Cookie wall format

Unsurprisingly, pop-up cookie walls that block navigation bring more additional opt-ins than when placed in the footer, constraining but not blocking the navigation.
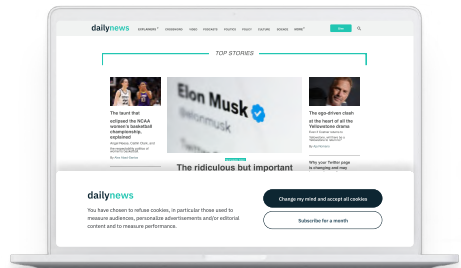
Layer 2 of the banner - Pop-up
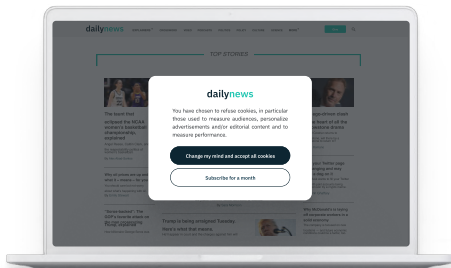
Consent rate uplift

+34%

Layer 2 of the banner - Footer

Consent rate uplift

+5%

Conclusion: Where does consent collection stand in 2024?

Since 2018 and the advent of the GDPR, we've seen new data privacy regulations appear all over the world, making user consent collection a key priority for global organizations.

This trend is not likely to slow down.

Our Chief Privacy Officer, Thomas Adhumeau, notes that consent is increasingly appearing in wide-ranging regulations that are not purely related to data privacy in nature, such as the Digital Markets Act (DMA) and the Digital Services Act (DSA):

> *Consent, once the exclusive domain of privacy laws, has now become the linchpin in a broader regulatory context, including consumer protection and competition law. With the DMA and DSA, we're seeing a shift towards greater user empowerment—where consent is integral not only for data privacy but also for transparency in advertising and fair data practices among gatekeepers.*
>
> *As we embrace this shift, consent is set to play a pivotal role in shaping the future of AI regulation, ensuring users have a decisive voice in this burgeoning field.*

Thomas Adhumeau
Chief Privacy Officer at Didomi

From the DMA and the DSA to the end of third-party cookies, we believe 2024 will confirm that consent is the cornerstone of any comprehensive digital strategy. It is essential for organizations to prepare and adjust for these major changes.

Throughout this whitepaper, we've seen that consent rates tend to vary from country to country, which can be attributed to several factors: Consumer culture, applicable regulations, influence of local data protection authorities, etc.

How can organizations remain up-to-date on these specificities and approach a constantly shifting data privacy industry?

- **Trust:** The foundation for successfully collecting consent from your users. Establishing trust comes from transparently communicating the purposes of data collection with them and transparently displaying the vendors you share that data with.

- **Expertise:** Are you aware of the applicable data privacy laws and regulations for you and your customers? Establishing a network of partners and trusting relationships is important to ensure you comply with these regulations and are ready for a potential audit.

- **Preferences:** Give your customers control over their data. Going beyond consent collection by giving them the ability to communicate their preferences will be key to building a relationship based on trust and creating truly personalized user experiences.

We thank our customers, partners, and collaborators for their trust and collaboration, and hope you found the content of this paper useful. For more information, visit **didomi.io**.

To discuss your consent collection, privacy, and compliance challenges, reach out to our team for a quick chat with one of our experts!

📞 **Book a call now**

DIDOMI