KANTAR MEDIA

BVDW

Let’s get personal

A study by BVDW and Kantar Media on consumers‘ views and attitudes towards personalisation

Executive Summary

Personalisation is increasingly shaping everyday life in Germany. This is particularly true for digital services and platforms, from product recommendations in e-commerce to tailored suggestions for the next streaming series and personalised social feeds. At the same time, the public and political debate is accelerating, often driven by perceived truths and personal opinions. Against this backdrop, the German Association for the Digital Economy (BVDW) e. V., together with the market research institute Kantar Media, is providing facts. The following study shows how people in Germany actually experience and evaluate personalisation. It offers a fact-based foundation and a starting point for further political, regulatory and economic debate.

67 %
consider personalisation to be appropriate.

- **Personalisation is a lived reality for users**

The majority of people in Germany expect a user experience tailored to their needs. They want services to respond to them, content to match their interests and the overall experience to become more convenient. Two thirds of respondents (67%) perceive personalised content as appropriate, with even higher approval in the contexts of e-commerce, social media and search engines. Personalised experiences are seen as more relevant, useful and convenient. The greatest benefit of personalisation is the ability to save time, avoid irrelevant content and access services more easily. Relevance is seen as the key benefit, it makes digital experiences more efficient and more enjoyable.

- **People are willing to share data when the value is clear**

Over 75% of respondents have no issue with sharing personal data, provided there is a clearly recognisable benefit. Their willingness is particularly high for streaming services (86%), online retail and social networks. For many users, data sharing is not a risk but a conscious decision: people share their data when transparency, relevance and value come together.

Over 75%
have no issue sharing personal data.

- **Trust grows when personalisation is transparent**

Only one in five respondents finds it inappropriate for companies to use personalisation to make digital services more relevant and efficient. At the same time, more than half place greater trust in certain platforms than in others when it comes to handling data. These results show: trust arises where the use of personalisation is transparent and understandable. Companies that act openly and communicate fairly lay the foundation for long-term acceptance.

Only one in five
find it inappropriate to use personalisation to make digital services more relevant and efficient.

- **Transparency and education are the key expectations**

People are fundamentally positive towards personalisation, but they also want greater insight and understanding of how it works. More than half (52%) expect transparency about data usage, and almost half call for more explanation of how personalisation operates. Many also want clearer information on how companies deploy personalisation. The message is clear: people want to understand – not to ban.

More than half
expect transparency about how their data is used.

Personalisation is a natural part of digital life: both desired and expected.

The findings of this study paint a clear picture. While political debate often approaches personalisation with scepticism, consumers experience it as a natural and useful part of their digital everyday life. The majority do not reject personalisation. Instead, they call for more transparency and clarity, but not blanket restrictions. Personalisation is an expression of modern digital culture. It provides orientation and relevance, making everyday life easier and more convenient for everyone. The digital economy now faces the task of strengthening this acceptance further. The expectations are clearly defined: more transparency and comprehensibility, leading to responsibility and trust. Personalisation builds trust through relevance and transparency. This is the foundation on which all sustainable digital business models are built.

Methodology

The findings are based on a representative online survey of 1,000 internet users aged 16 and over in Germany, conducted in summer 2025 by Kantar Media on behalf of BVDW.

Sample Breakdown
Breakdown of the most important groups within the sample

Group	Respondents	% of the sample
Total sample	1,000	100 %
Male	491	49 %
Female	509	51 %
Light internet users (up to 2 hours)	246	25 %
Average internet users (2–5 hours)	489	49 %
Heavy internet users (more than 5 hours)	265	27 %

The aim was to capture attitudes, behaviour and understanding regarding personalisation, not only through abstract opinion questions but also using concrete application scenarios (mock-ups).

Innovative mock-up approach

Participants were shown realistic simulations of typical digital environments, including:
- **an e-commerce homepage with personalised product recommendations**
- **a social media feed**
- **a search results page**
- **a streaming (SVOD) homepage**
- **a news website**
- **and a digital advertisement**

Each of these environments was presented in two versions
- **a personalised version** (based on characteristics such as location, gender, household composition, time spent online or stated interests gathered beforehand in the introductory questions)
- **and a generic, non-personalised comparison version.**

For each category, participants were asked three key questions:
- **Which version do you find more interesting?**
- **Which appears more relevant to you?**
- **Which would you prefer to see?**

This approach made it possible to empirically determine in which digital contexts personalisation is actually perceived as adding value and in which instances it is not. These questions were initially posed in a neutral manner and then asked again after participants had been informed that the content was personalised. In addition, questions were included on understanding, trust, data sharing, and attribution of responsibility.

Results

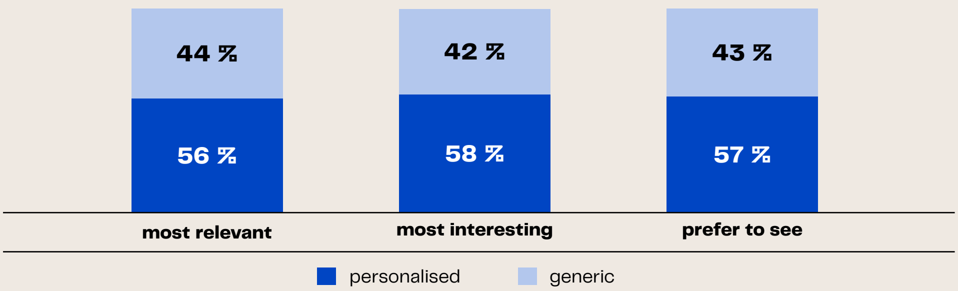
Chapter 1: How users experience and evaluate personalisation

How do people in Germany experience personalisation in their digital day-to-day lives? Which forms do they prefer, and at what point do they perceive personalised content as relevant or as disruptive? This chapter examines the perception of personalisation across different contexts, from e-commerce and social media to streaming, advertising and news. Participants were shown both personalised and generic versions of the same services and asked which they found more relevant, interesting or helpful.

The findings are clear: personalisation is a firmly established part of digital daily life.

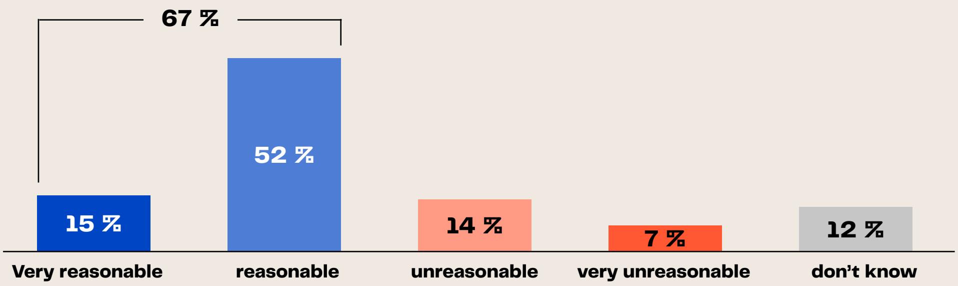
When looking across all services, most users consider personalised content to be more relevant, more interesting, and prefer to see it.

Average across all services – Personalised vs. Generic



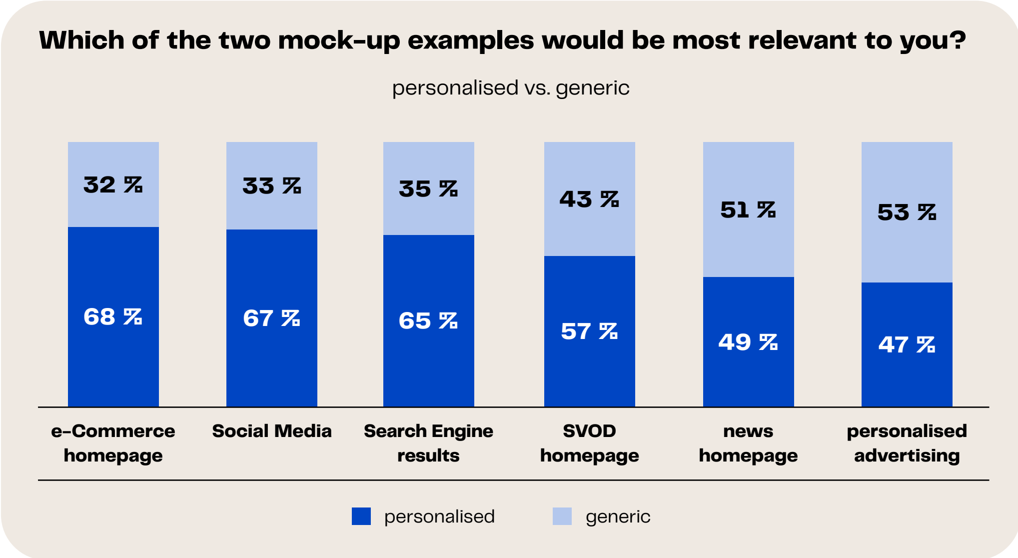
How reasonable do you think it is for companies to use personalisation?

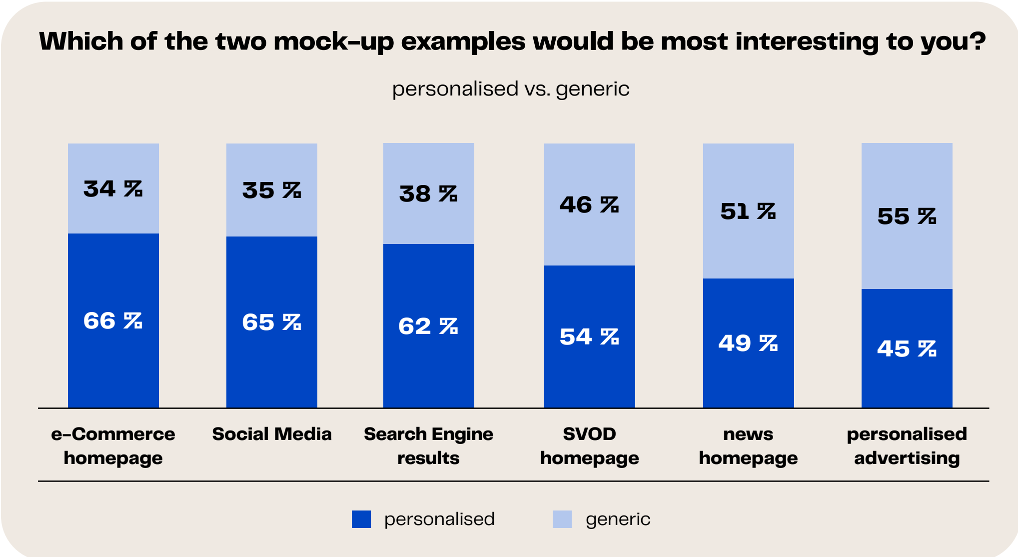
All adults

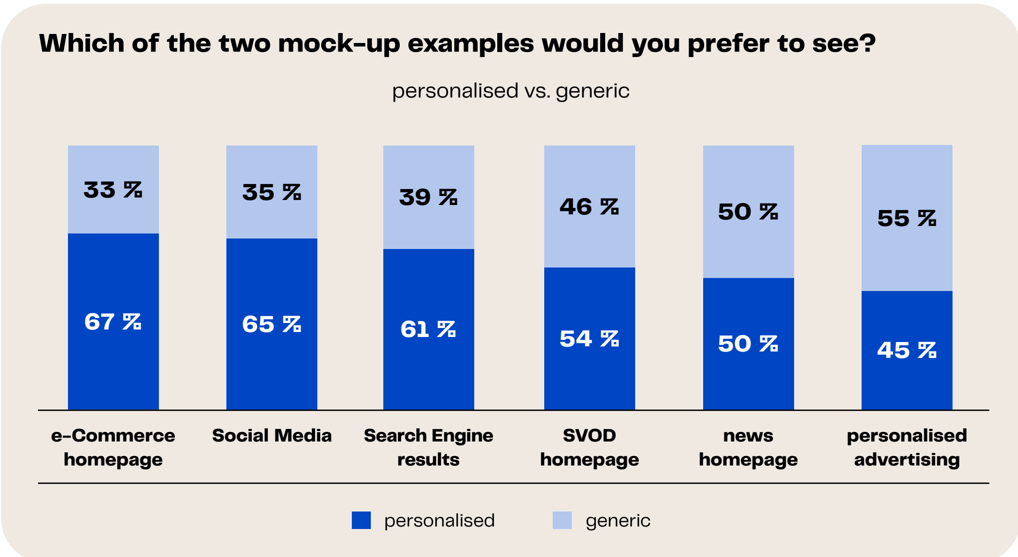


Two thirds (67 per cent) of respondents consider personalisation generally appropriate. Looking at the different scenarios, approval is particularly high in e-commerce, social media and search engines. After a brief explanation of personalisation and clear labelling, support remains strong: in all tested scenarios, the majority still prefer personalised content. Even in the case of advertising only approx. one in five deliberately opts for generic offerings.

Here are the results of consumer attitudes in the mock up comparisons before the respondents were being informed that the content was personalised:





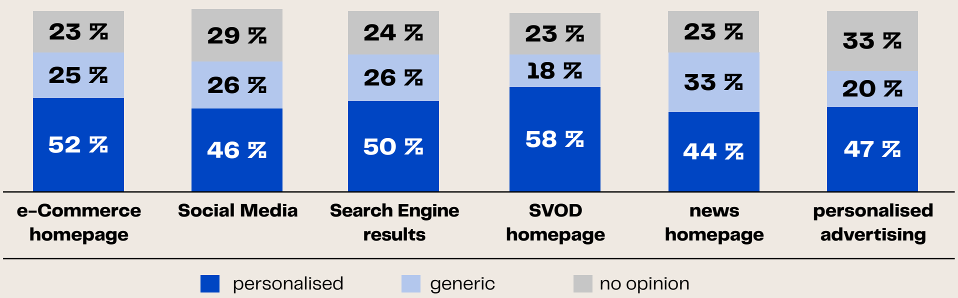


The participating consumers were then given a brief and easy-to-understand explanation outlining the purpose of personalisation.

Here is an example used for the topic of streaming services:
"As you may have seen in these examples of homepages from streaming services or online video platforms (e.g. Netflix, Spotify, YouTube, etc.), one of the examples used content you had previously watched to recommend programmes tailored to you. Streaming services, online video platforms and apps often request information such as your location, age or previously viewed content in order to present you with personalised recommendations. You can choose whether to share this information when you first visit the website or app, and you can change your preferences later in your settings. Do you think it is better when a homepage is tailored to you in this way, or do you prefer purely generic pages like the alternative example you saw?"
After this explanation, the respondents were surveyed a second time to assess how their attitudes had changed following the clarification.

Do you think it is better to have streaming services/shopping websites// search engines/personalised advertising/social media/news that tailor their results like this or would you prefer more generic results like the alternative example you saw?

Preference for personalised vs. generic after explanation



The results show that approval remains high, also after respondents are informed about personalisation. Personalisation is accepted when it is perceived as functional and useful. In contexts involving a wide range of information or journalistic responsibility, acceptance is lower. Regarding the perceived benefits of personalisation, 40 per cent value that it helps to avoid irrelevant information and spam, 38 per cent appreciate the time savings, and 30 per cent the convenience of features such as automatic login.

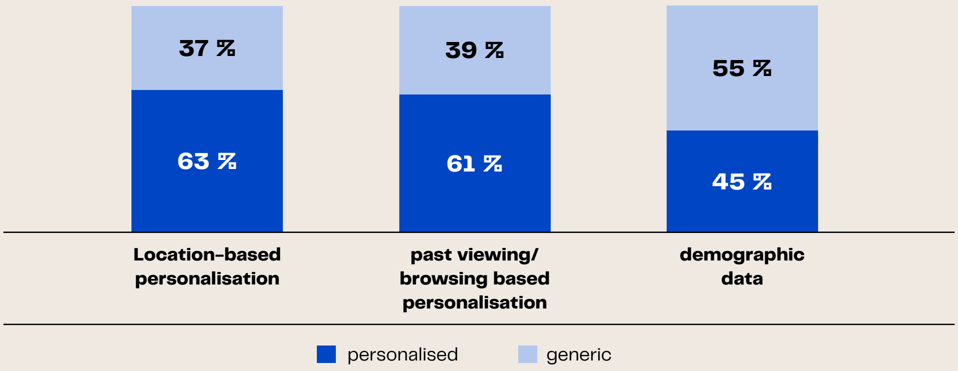
Which of the following benefits of personalisation do you appreciate, if any?

40% Avoiding irrelevant content or spam
38% Saving time when shopping or browsing
30% Automatically recognizing me when I return to a site or service, so I don't have to log in again
29% Recommending videos, news stories and other content I might like
29% Discovering new products or content tailored to me
28% Remembering things I have looked at previously on a site or service so I can come back to them
28% Receiving reminders or prompts that are helpful
27% Seeing more relevant advertisements and offers
23% A smoother and more efficient online experience
16% Helping monitor my health and fitness
15% Tailored content feeds on social media
14% None of these – I don't see any benefits in personalisation
14% Sending me e-mails related to things I might be interested in purchasing

A clear pattern also emerges in the detailed findings. Users prefer personalisation in situations where they perceive an immediate benefit or contextual relevance. This applies, for example, when it is based on location or past search and browsing activity. The vast majority consider such personalisation to be relevant, interesting and desirable. Personalisation based on one's demographic data is attractive to almost half of users. .

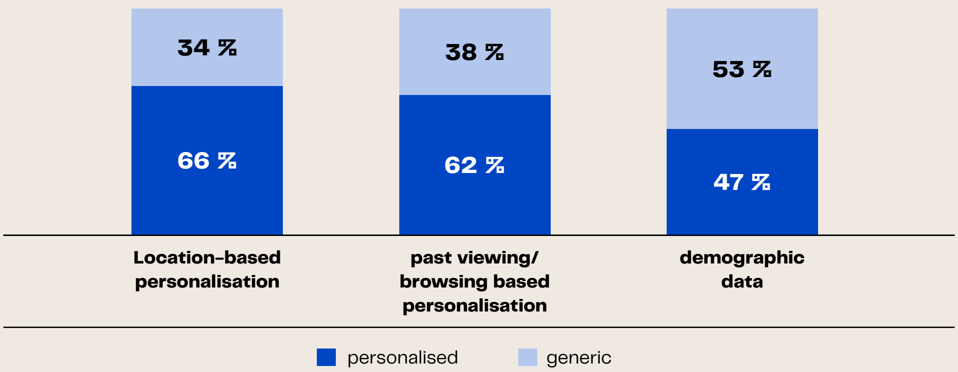
Personalisation based on localisation and past browsing experiences are generally preferred to see

Analysis of the mock-ups based on the collected data



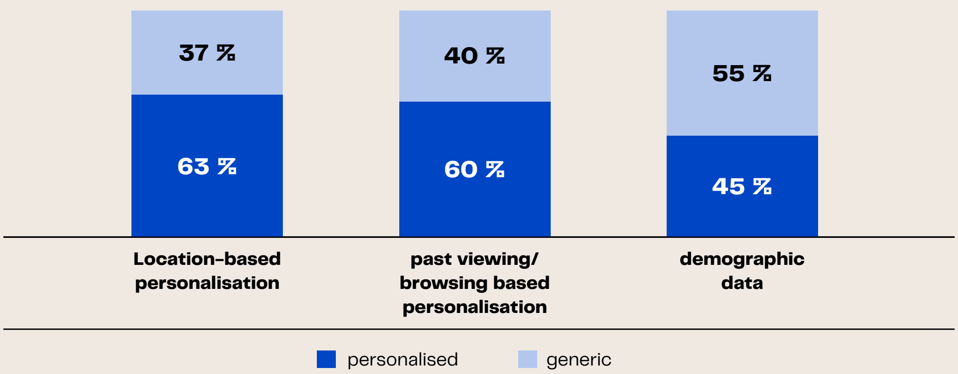
Personalisation based on localisation and past browsing experiences are generally considered more relevant

Analysis of the mock-ups based on the collected data



Personalisation based on localisation and past browsing experiences are generally considered more interesting

Analysis of the mock-ups based on the collected data



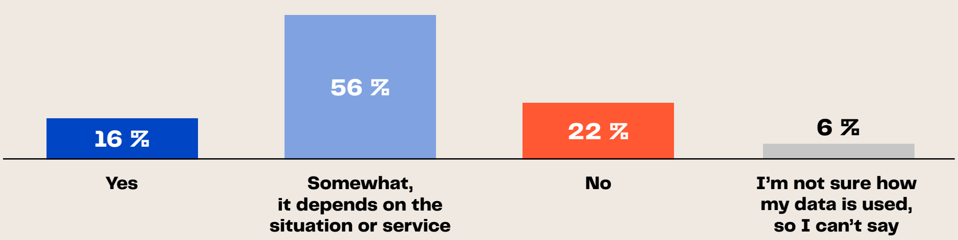
Chapter 2: How users think about sharing their data

What role does trust play when people share personal data for personalised experiences? And what conditions are needed for them to be willing to do so? This chapter of the study explores respondents' attitudes towards data sharing, examining the issue both in general terms and within specific scenarios. Participants were asked in which instances they are prepared to share information and which motivations or concerns play a role in that decision.

The results are conclusive: the willingness to share data is high when relevance and value are evident. In all tested scenarios, at least three quarters of respondents had no issue sharing data if the benefit was clear. This figure rises to as much as 86 per cent for streaming services, followed by e-commerce and social media.

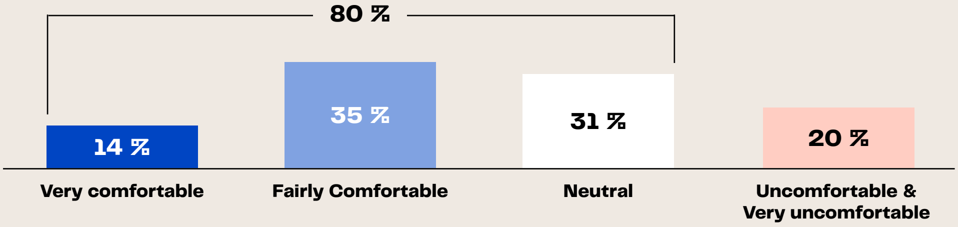
Are you willing to share data and information about you to have this kind of personalisation of services online?

All Adults – Comfortability sharing the data



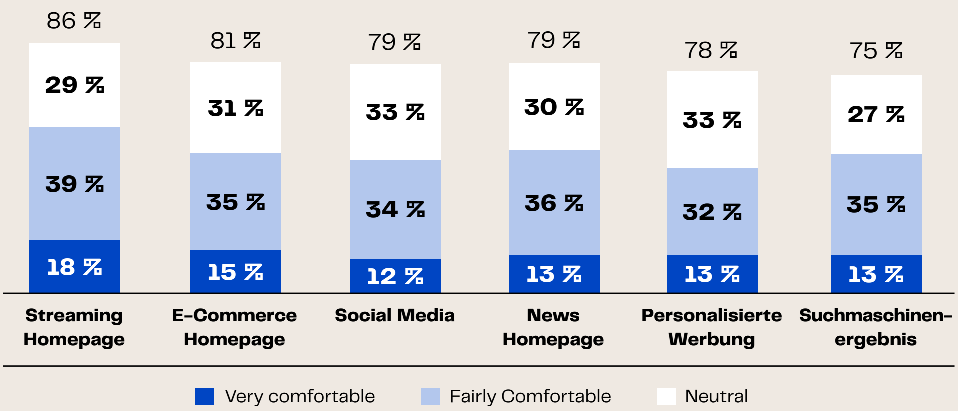
How comfortable are you with this personalisation, assuming that you have given the relevant permission?

All Adults – Comfortability sharing the data



How comfortable are you with this personalisation, assuming that you have given the relevant permission?

All Adults – Comfortability sharing the data



Chapter 3: How personalisation can be improved for users

How can personalised services be designed in a way that earns people's lasting trust? What improvements do users want in order to experience personalisation more consciously and positively?

This part of the study examines what users expect from companies to enhance their digital experience: from greater transparency and control over data use to clearer communication of the concrete benefits of personalisation.

The findings paint a clear picture: most users consider personalisation to be appropriate and helpful.

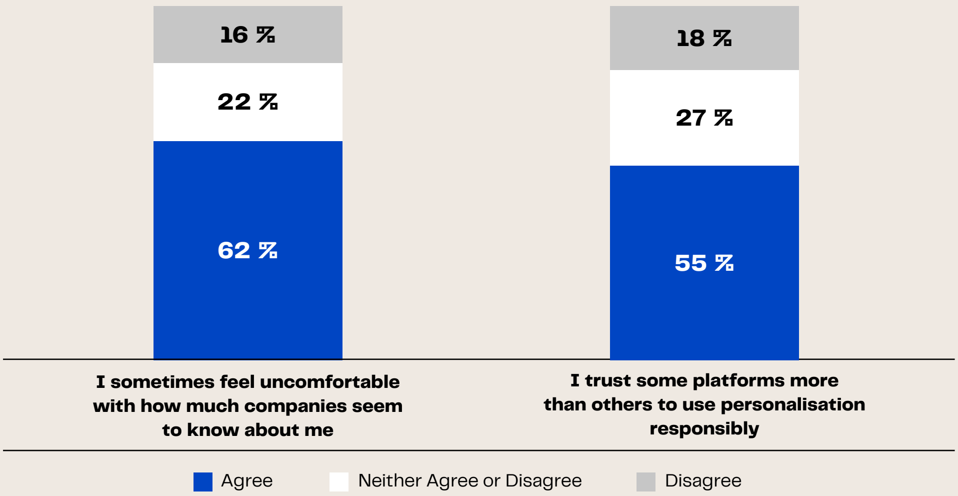
At the same time, many want these processes to become more understandable and traceable. Three expectations are central in the outcomes of this study:

52 per cent want more transparency about data use, 49 per cent call for better explanation of how personalisation works, and 42 per cent want clearer information on how companies apply personalisation.

The message is unmistakable: people want to understand, not prohibit. They expect the digital economy to design personalisation in a way that remains transparent and fair. Rather than introducing additional laws, soft-law approaches such as corporate policies, clear guidelines and better user information are seen as the more suitable instruments.

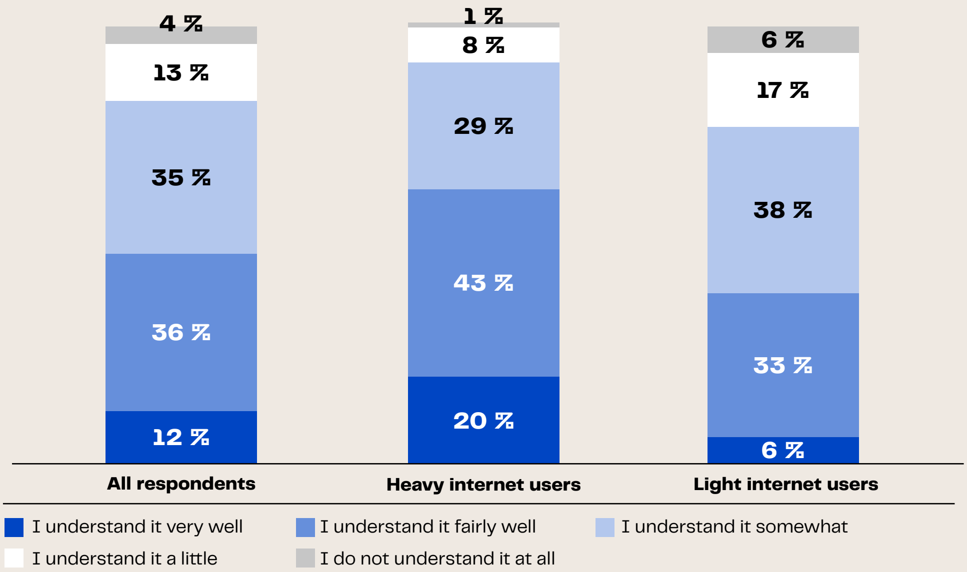
To what extent do you agree or disagree with the following statements about digital personalisation?

All Adults – Extent agree to disagree with statements on digital personalisation



Thinking about how personalisation functions, specifically about how companies use your data to tailor your online experience – how much would you say you understand?

Self-assessment of understanding of personalisation



If changes were to be made to how personalisation is currently handled by companies and regulators, which of the following changes would you like to see?

52% **More transparency from companies about what data and information is collected and how it's used**

49% **More education to users on what data is used and how it's used**

42% **More information on how companies use personalisation**

39% Stricter laws governing the collection and use of data and information for personalisation

39% More information on my rights online and the legal framework surrounding personalisation

37% Better enforcement of laws on the companies for existing data privacy regulations

17% Fewer restrictions: I believe personalisation should be made easier

BVDW Conclusion and Policy Implications

The data collected by Kantar Media provides a compelling picture from BVDW's perspective: users experience personalised content as relevant and helpful. For them, it is a natural part of digital services.

Consumers perceive personalisation as useful and meaningful. They expect clear transparency and responsible use of their data. They want to understand how their data is used. At the same time, they reject blanket restrictions. They share data when they see a tangible benefit and trust companies that make personalisation evident, understandable and responsibly managed.

These findings stand in great contrast to the public and political debates on personalisation. While discussions and regulatory initiatives often focus on distrust and potential risks, consumers are already practising a different digital reality: open, informed, user-focused and responsible.

For the digital economy, this means taking responsibility.

This goes beyond mere compliance to actively designing digital services that build trust, ensure transparency and simultaneously enable innovation.

The results also underline the need for a new culture and narrative surrounding data in Germany and across Europe. Political initiatives seeking to increasingly govern how data is utilised, i.e. through additional obligations, bans or reporting requirements overlook this reality. Consumers above all want transparency and education rather than new laws. Instead of focussing on additional bans, dialogue, guidelines and the enforcement of existing rules can jointly foster trust and innovation.

European businesses must continue to operate within a regulatory environment that facilitates and encourages the responsible use of data. Modern data policy should provide clear and understandable rules that ensure legal certainty while also leaving room for innovative and data-driven business models.

Europe has the opportunity to become a pioneer in fair, responsible and opportunity-oriented data use. This requires the courage to differentiate between misuse and responsible application. Personalisation exemplifies this new balance. Data protection forms the foundation for transparency, trust and competitiveness. Data utilisation on the other hand creates clear added value when applied responsibly and in the interests of users, businesses and society.

BVDW sees this study as an invitation to dialogue. Within the framework of the Digital Fairness Act, we want to discuss the implications for business, society and consumers, share experiences, and jointly develop ways forward towards responsible data-driven innovation.

Personalisation builds trust through relevance and transparency. This underpins all sustainable digital business models as well as the future-oriented, responsible and sustainable European digital economy.

German Association for the Digital Economy (BVDW) e.V.

The Bundesverband Digitale Wirtschaft (BVDW) e.V. is the industry association representing companies whose business models are based on digital technologies or derive their value from them. Together with its members from across the entire digital economy, BVDW is already helping to shape the future – through creative solutions and cutting-edge technologies. As a driver of innovation, guide, and accelerator for digital business models, the association advocates fair and transparent rules and promotes an environment conducive to innovation. In doing so, BVDW always considers the economy, society, and the environment. In addition to organising DMEXCO, the leading trade fair for digital marketing and technologies, and the German Digital Award, BVDW also presents the CDR Award – the first award in the DACH region for digital sustainability and responsibility – as well as a wide range of specialist events.
More information is available at **www.bvdw.org**

Working Groups "Data Society" & "Data Driven Markets" within BVDW's Public and Regulatory Affairs Department

BVDW's Public and Regulatory Affairs Department is responsible for developing the association's political positions on current regulatory initiatives and representing these positions to policymakers and public authorities. It thus leads the association's political and regulatory affairs. Within the Policy Department, several working groups address different aspects of policy discussions, including the Working Group Data Society and the Working Group Data Driven Markets.

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Impressum

Let's get personal

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