debating europe

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Cookies, affordability, and online choice in Europe

Acknowledgements

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About the project

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Debating Europe is the citizen engagement unit of Friends of Europe, an independent Brussels-based think tank working for a more inclusive, sustainable, and forward-looking Europe.

This report draws on insights from a survey conducted between 19 - 23 February 2026, involving 2,000 participants aged 18 to 60 across five EU Member States - France, Germany, Italy, Ireland, and Poland - providing a comparative picture of public attitudes towards "free" online services, preferred digital business models (such as ads or subscriptions), experiences with cookie consent mechanisms, and expectations around data control and privacy.

Introduction

The European Commission's Digital Omnibus proposal, published in November 2025, has brought renewed attention to cookie banners and the wider question of how online privacy rules should work in practice. The proposal aims to simplify consent by reducing repeated pop-ups, introducing clearer one-click choices and allowing users to manage preferences through central browser settings, while removing consent prompts for certain low-risk uses. This responds to frustrations many users have with cookie banners. At the same time, it raises an important policy question about how to reduce friction without weakening user control or disrupting the advertising models that continue to support free online content.

This report examines that debate through survey evidence from 2,000 people across France, Germany, Ireland, Italy and Poland. The findings suggest that respondents across the five countries take a broadly similar, pragmatic view of the trade-off between privacy, advertising and access to online content. **While there is a clear appetite for less disruptive online experiences, the findings show a public being attentive to the trade-offs required to sustain the open web.** Awareness of the role cookies play in keeping content free is notable, although not universal, and the results suggest that any shift in advertising models is constrained by affordability limits among consumers.

This matters because publishers, particularly news and entertainment sites, are increasingly asking users who reject personalisation cookies to pay for access. A browser-level consent mechanism could therefore significantly reduce consent rates and, in turn, reduce the availability of free, ad-funded content.

Our research suggests that Europeans want a simpler online experience, but not at any cost. Although many support reducing friction, 41% worry that automated simplification, such as browser-level rejection, would leave them blocked from websites or confronted with immediate paywalls.

The data highlights these affordability constraints, indicating that a subscription-based internet would fundamentally skew towards younger, more urban, and more affluent demographics. The **urban-rural divide** is visible not only in how much users are willing to pay, but in the specific point at which they abandon paid models in favour of free access. This geographic disparity creates a distinct pattern across the continent: in France, **60% of rural respondents would rely solely on free sources** compared with **30% in large cities**, while in Germany, only **12% of 46–60-year-olds** think paying for multiple websites would be affordable, compared with **37% of 18–25-year-old**s.

Italy and Poland reveal similarly sharp disparities between their urban centers and rural villages. **This means that a shift away from ad-supported content could disproportionately cut off non-urban populations from the digital town square**. Even in more demographically balanced markets like Ireland, persistent socioeconomic gaps remain. Ultimately, these divides suggest that for a significant portion of the European population, the alternative to an ad-supported model is not a subscription-based internet, but digital exclusion.

In parallel, the survey reveals a complex public sentiment regarding the evolution of online consent. Rather than rejecting the current model outright, respondents express a nuanced view of cookie-based access. Nearly half (48%) describe cookie banners as annoying but necessary to keep content free, while 39% say they usually accept them quickly in order to access information. Alternatives such as non-personalised advertising also receive support, but this sits alongside clear affordability concerns. With 45% saying that paying for multiple subscriptions would not be affordable, the findings suggest that many users are cautious about changes that could place more content behind paywalls.

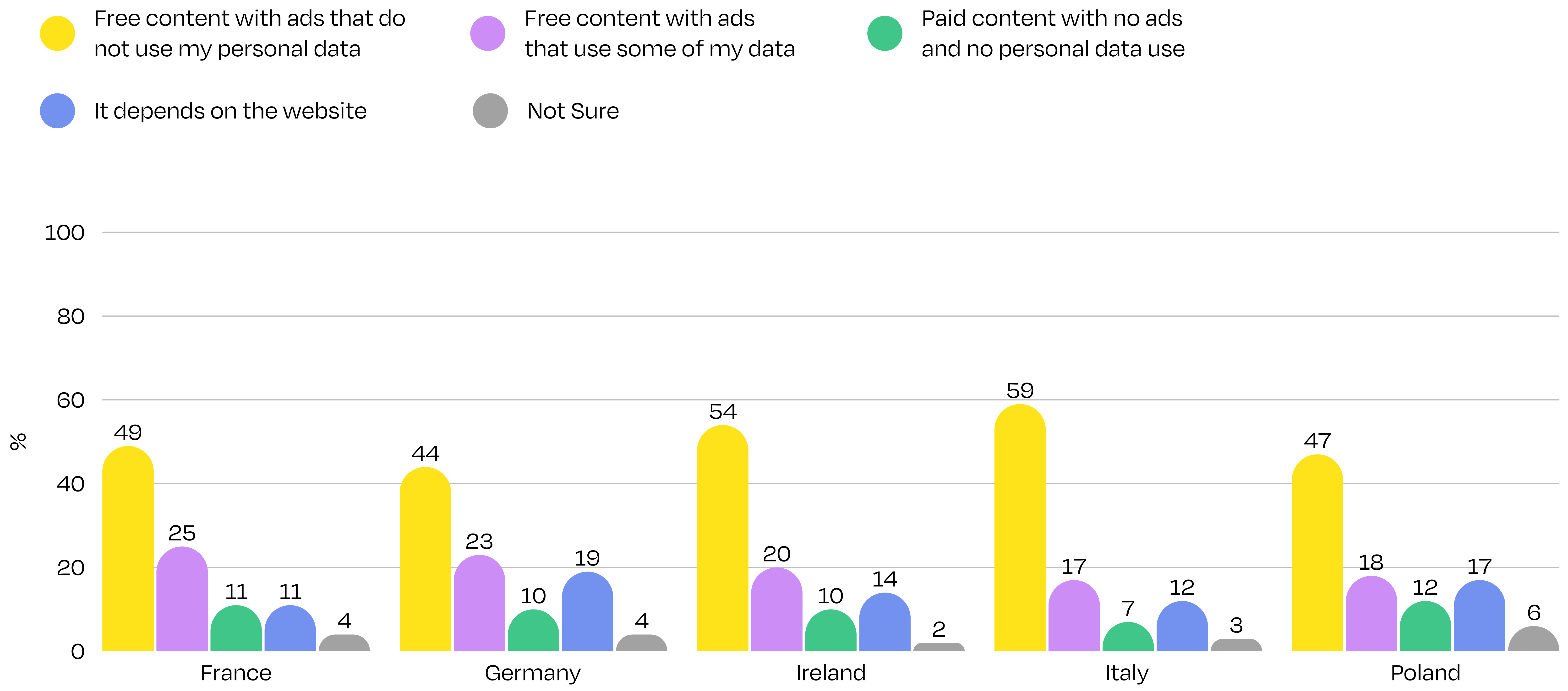
These considerations also shape attitudes toward browser-level consent. Centralized settings appear appealing in principle, but support becomes more conditional when possible consequences are taken into account: 41% expect that automated browser rejection could lead some websites to restrict access or require payment. As a result, preferences around a standardized browser choice remain closely split. The largest share (40%) favours the flexibility to make different choices for websites they particularly value, while 38% prefer a single overarching setting.

Taken together, the findings suggest that while the public desires reduced friction, this preference is conditional; users remain cautious of streamlined consent models that could inadvertently restrict access and lead to digital exclusion.

1

Preferences on privacy, advertising and paid access

Closest preferred option

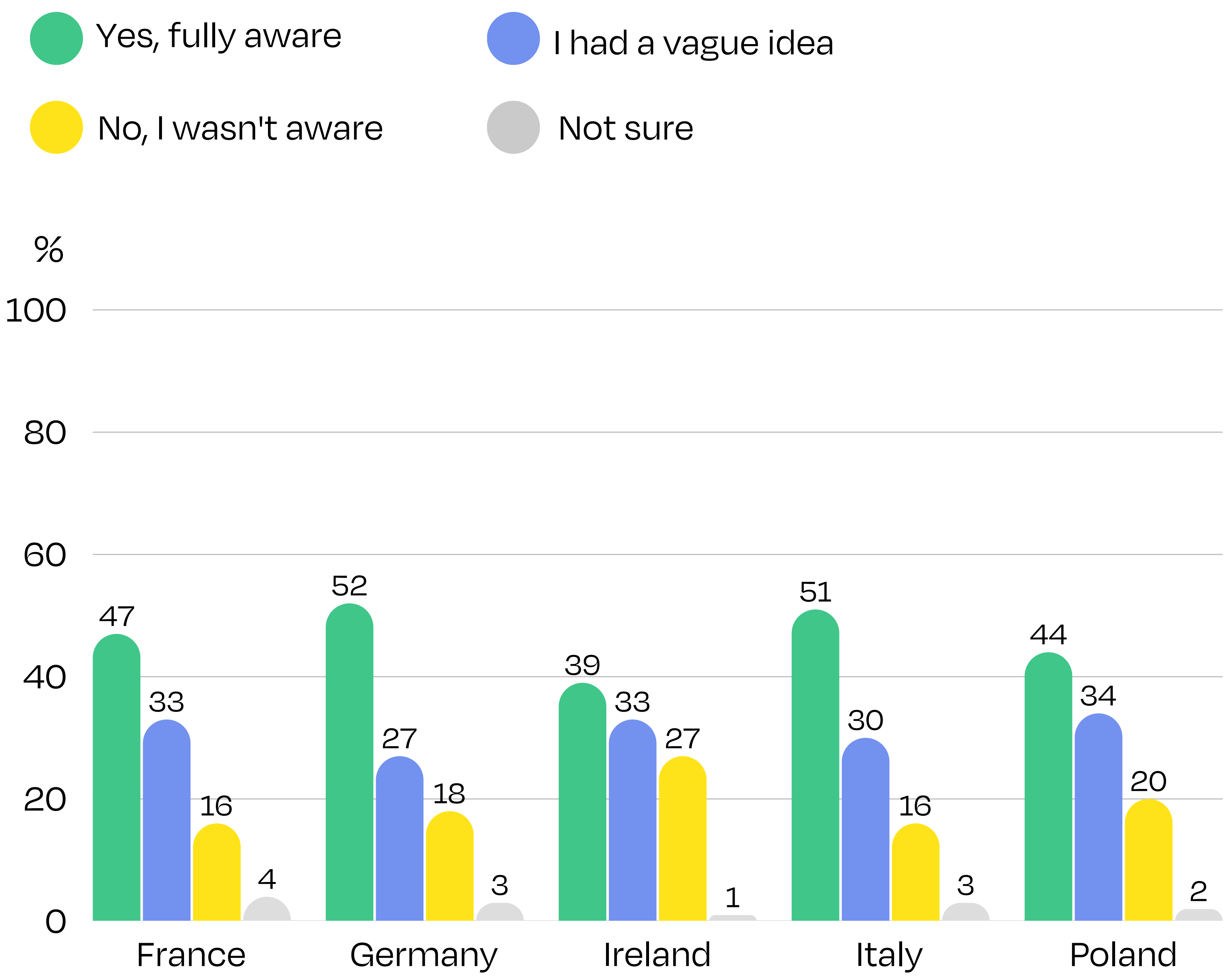


Across all countries, **a slight majority of respondents (51%) preferred free content supported by non-personalised advertising**. By contrast, 20% preferred free content supported by advertising that uses some personal data, 10% preferred paid content without advertising or data use, and 14% said that their preference would depend on the website.

Cross-country differences were present, but they were limited in scale. Italy showed the highest preference for free content supported by non-personalised advertising (59%), while Germany showed the lowest (44%), a gap of 15 percentage points. Respondents in Germany were also more likely than those in other countries to say that their preference depended on the website.

Awareness of the link between cookies and free access varied across countries. **Overall, 46% of respondents said they were fully aware that accepting cookies often helps keep websites free, 31% said they had a vague idea, and 19% said they were not aware.** Full awareness was highest in Germany (52%) and Italy (51%), and lowest in Ireland (39%). Ireland also had the highest share of respondents who were not aware, at 28%, compared with 16% in both France and Italy.

Awareness of cookies supporting free website access



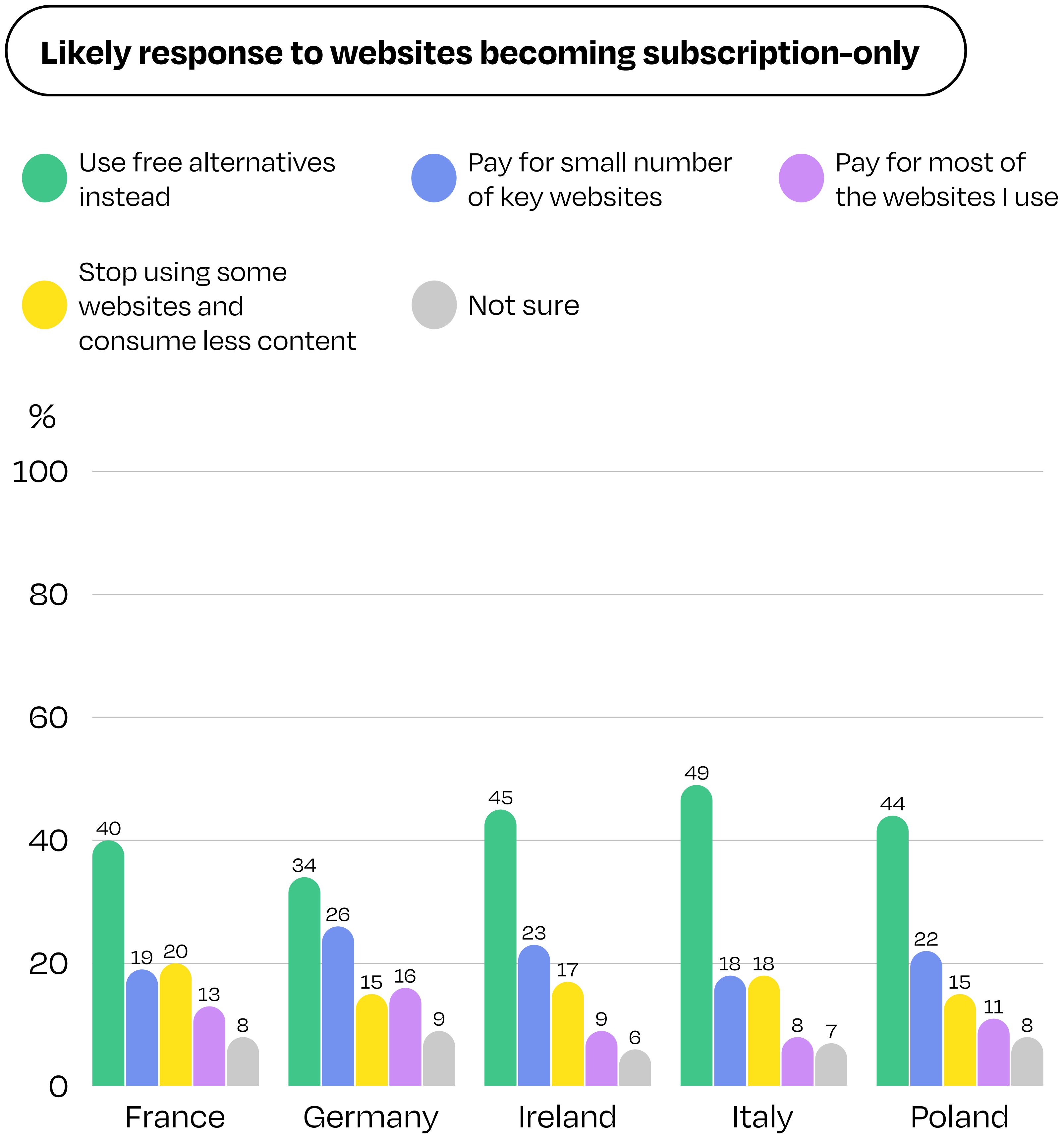
2

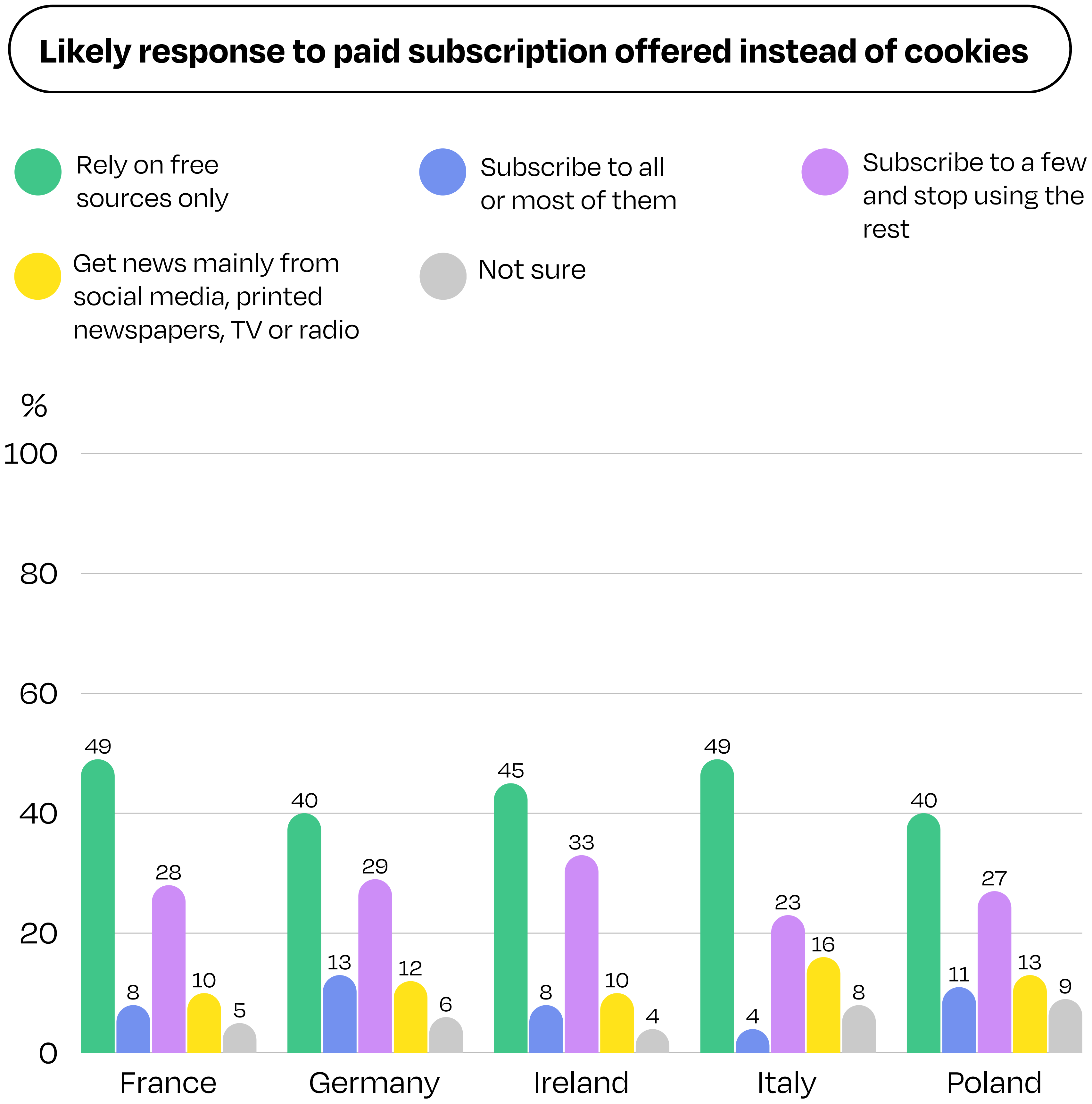
Subscription limits and affordability

The data suggest that many **respondents would choose free alternatives rather than pay for subscriptions.** If rejecting cookies caused many free websites to become subscription-only, 42% said they would turn to free alternatives, 22% would pay for a small number of key websites, 17% would stop using some websites and consume less content, and 11% would pay for most websites they use. **Italian respondents were the most likely to prefer free alternatives (49%), while German respondents were the least likely to do so (34%).** Germany, meanwhile, had the highest share of respondents willing to pay for most websites at 16%, compared with 8% in Italy.

This pattern is reflected in responses to broader questions about subscriptions. When asked what they would do if **most of the websites they use became subscription-only, 44% said they would rely only on free sources, while 28% said they would subscribe to a few and stop using the rest**. Only 9% said they would subscribe to all or most websites. Germany again stood out, with 13% choosing this option, compared with 4% in Italy. These differences point to varying levels of willingness to subscribe across countries.

Affordability could be an influencing factor behind these choices. Across the full sample, **45% said that paying separately for multiple websites would not be affordable for most people in their country.** This view was most common in Ireland (52%) and Italy (51%), while **Germany was notably lower** at 29%. Germany also had the highest share of respondents saying that such payment would be affordable mainly for higher-income households, at 32%, compared with 27% across the full sample.


Likely response to websites becoming subscription-only
Use free alternatives instead
Pay for small number of key websites
Pay for most of the websites I use
Stop using some websites and consume less content
Not sure
%
100
80
60
40
20
0
40 19 20 13 8
34 26 15 16 9
45 23 17 9 6
49 18 18 8 7
44 22 15 11 8
France
Germany
Ireland
Italy
Poland


Likely response to paid subscription offered instead of cookies
Rely on free sources only
Subscribe to all or most of them
Subscribe to a few and stop using the rest
Get news mainly from social media, printed newspapers, TV or radio
Not sure
%
100
80
60
40
20
0
49 8 28 10 5
40 13 29 12 6
45 8 33 10 4
49 4 23 16 8
40 11 27 13 9
France
Germany
Ireland
Italy
Poland

3

How much people are willing to pay

Maximum monthly amount willing to pay

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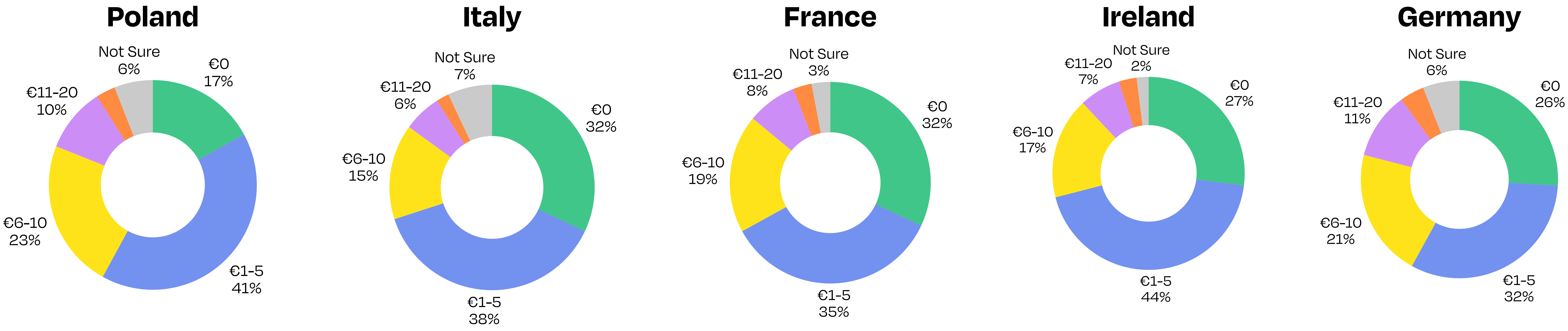


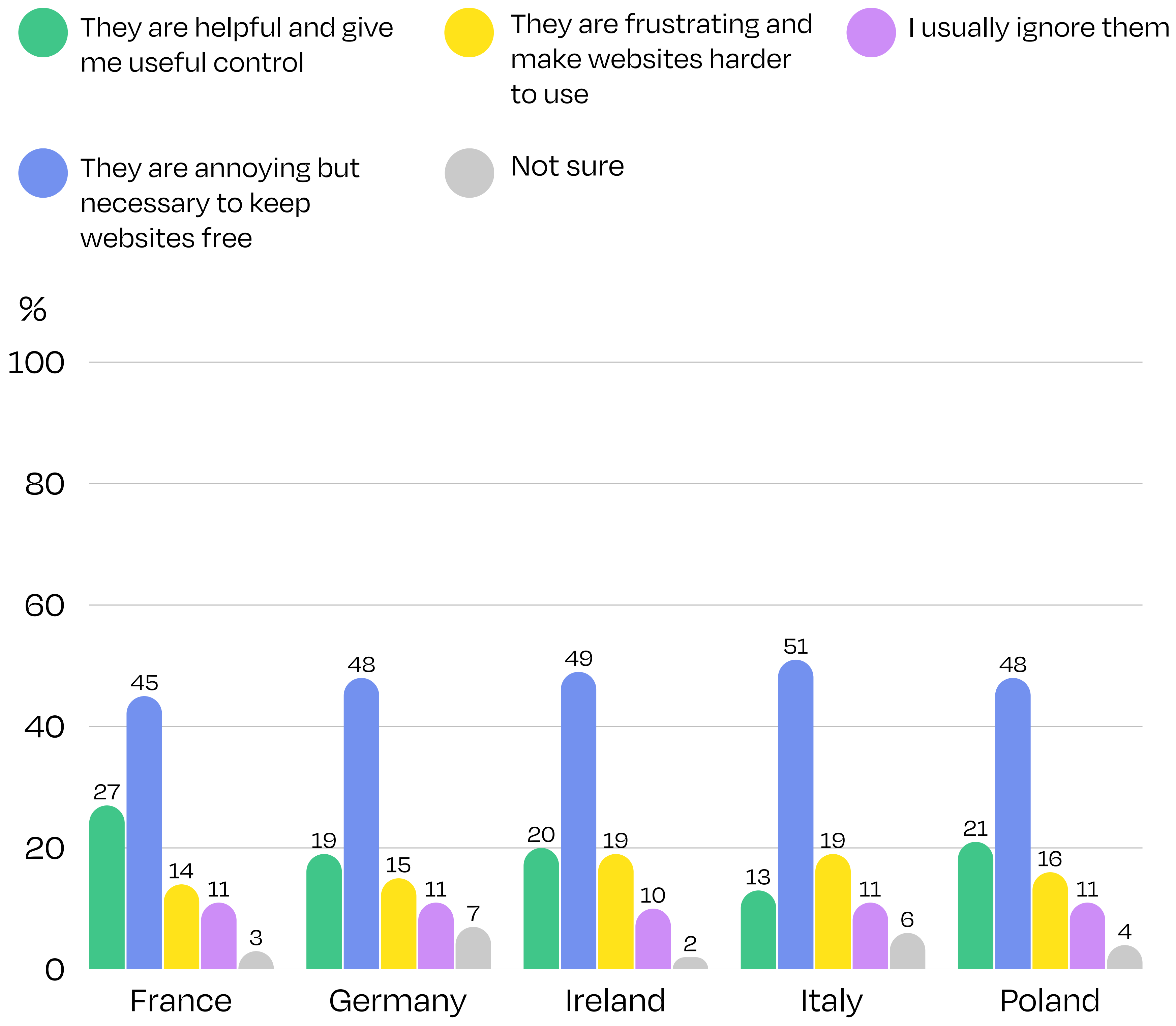
When asked how much money respondents are will to pay for access to content, **responses were clustered at the lower end**. Over a third (38%) said they would realistically pay €1–5 per month for access to online news and content without ads or data tracking, over a quarter (27%) said they would pay nothing, and just under a fifth (19%) said they would pay €6–10. Only 8% selected €11–20 and 3% selected more than €20. **Overall, 57% are willing to pay between €1 and €10, while only 11% would pay more than €10.**

Country differences were visible here as well. Ireland had the highest share of respondents willing to pay €1–5 per month (44%), while Germany had the lowest (32%). By contrast, Germany had the highest share willing to pay more than €11 per month, at 15%, compared with 8% in Italy. France and Italy, meanwhile, recorded the highest shares saying they would pay nothing, both at 32%, compared with 17% in Poland. **The overall pattern across most countries suggests that most respondents were not willing to pay more than modest monthly amounts.**

4

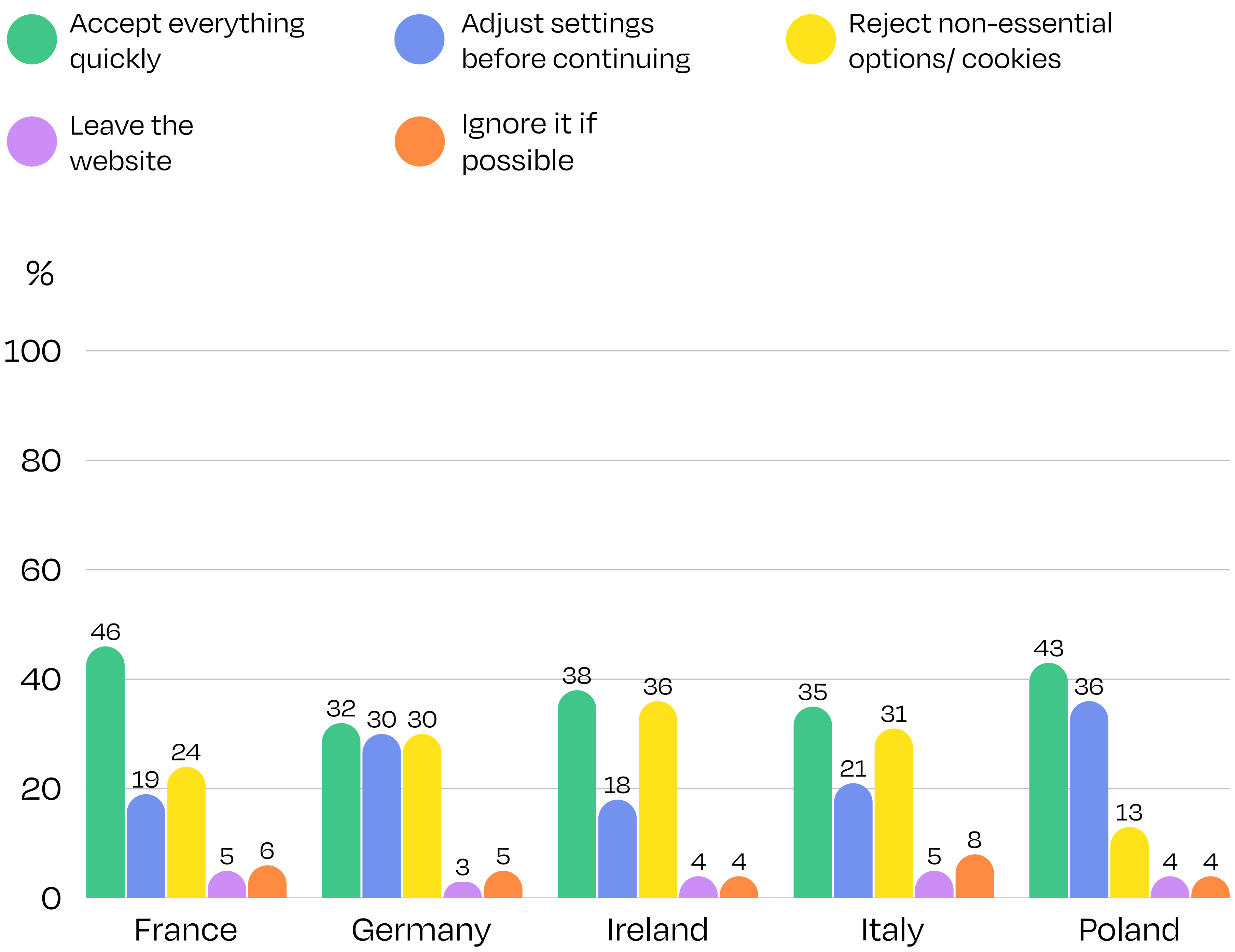
Cookie banners and user experience

Experience with cookie consent banners



Rather than rejecting the model outright, **many respondents (48%) appear to accept the underlying value exchange of the open web**: free content funded by advertising, even if the current banner experience is seen as cumbersome. 16% said cookies are frustrating and make websites harder to use. By contrast, only 20% said they are helpful and give users useful control, while 11% said they usually ignore them. France had the highest share of respondents who viewed cookie banners as helpful (27%), while Italy had the lowest (13%).

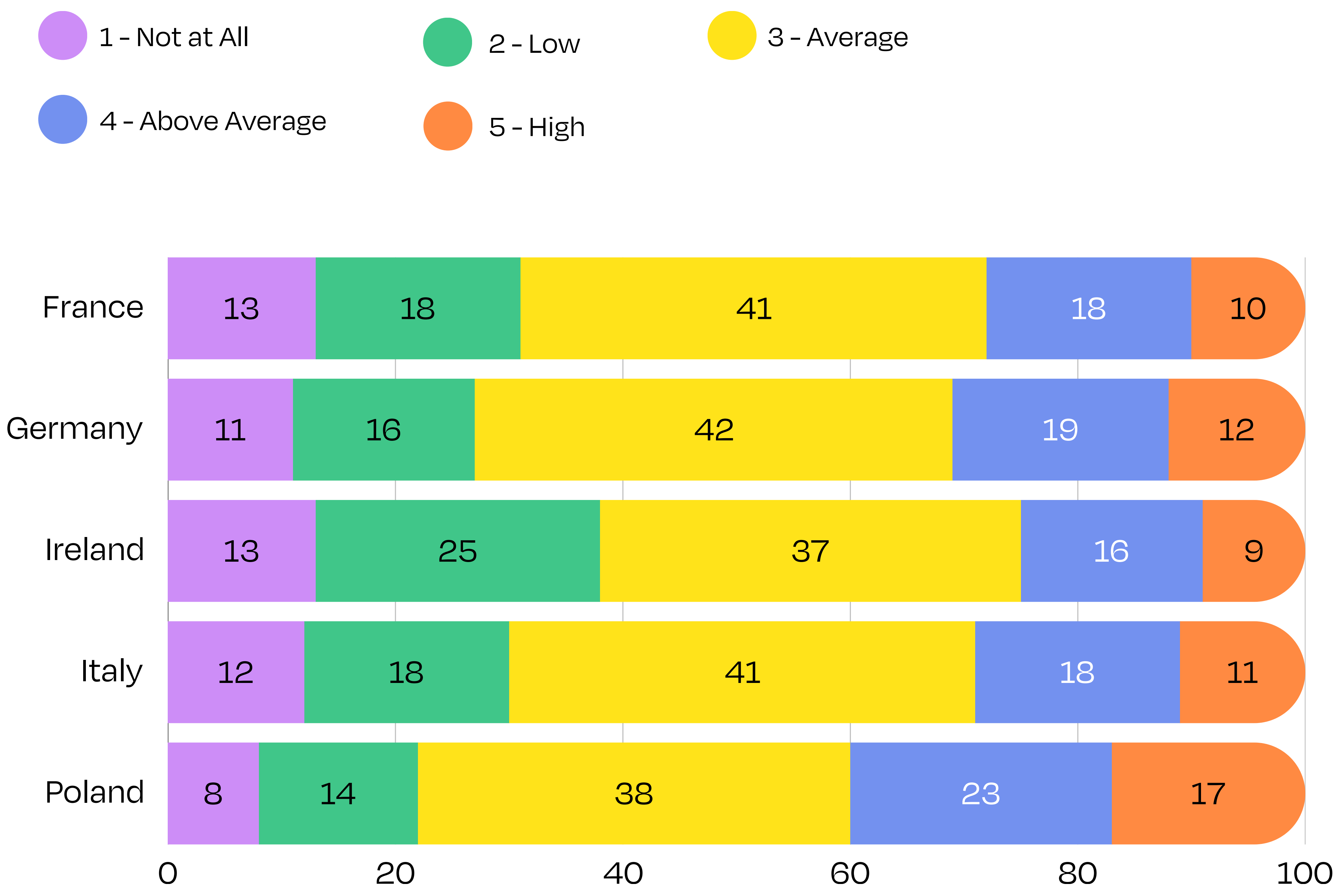
Usual response to cookie banners



When faced with cookie banners, respondents described a mix of behaviours. About 39% said they usually accept everything quickly, 25% adjust settings before continuing while 27% reject non-essential options or cookies.

Almost half of French respondents (46%) said they usually accept everything quickly, the highest share among the countries surveyed, while German respondents were the least likely to do so (32%). Meanwhile, Poland recorded the highest share of respondents who said they adjust settings before continuing (36%), and Ireland had the highest share who said they reject non-essential options (36%).

Understanding of information shown in cookie banners

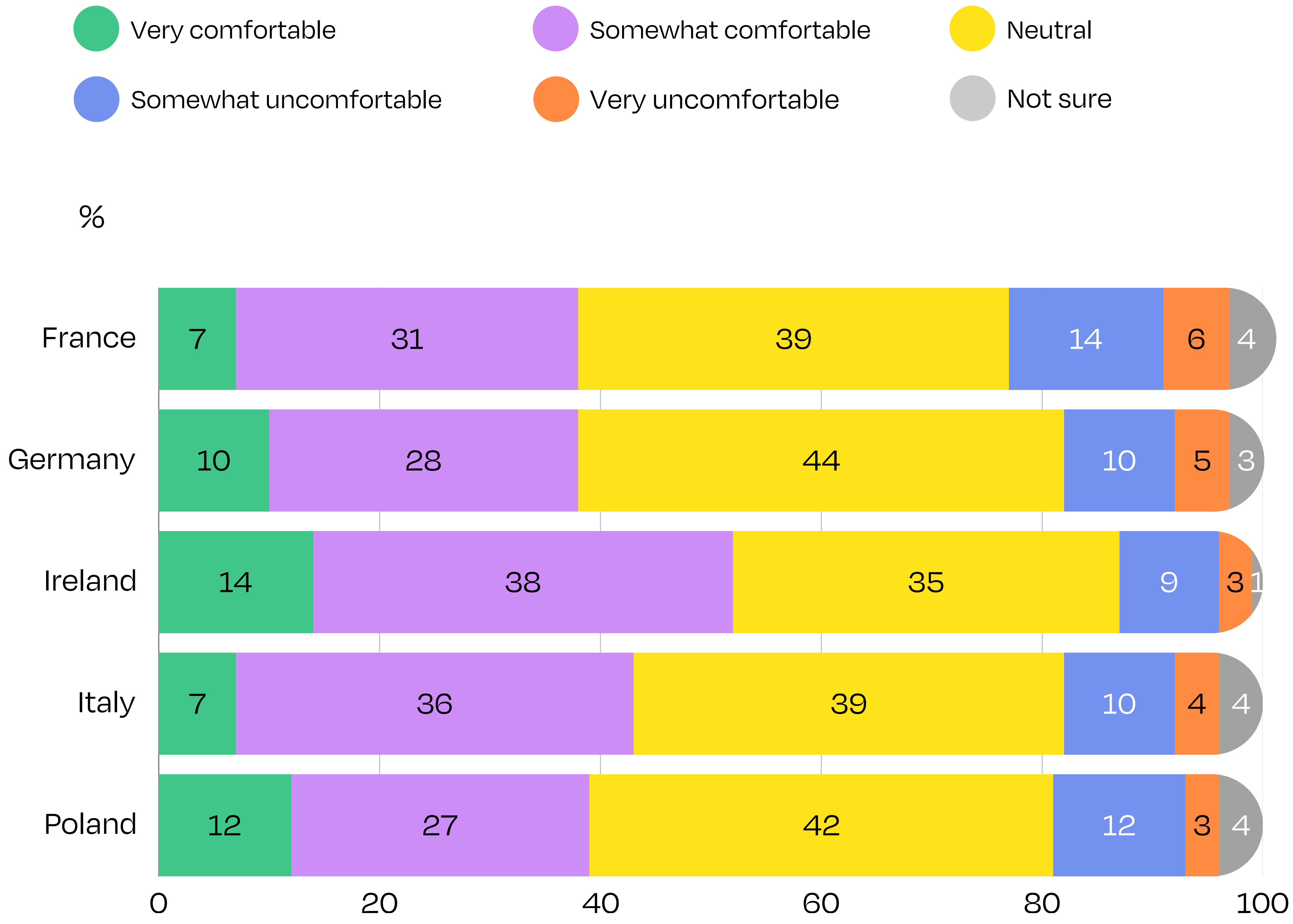


Understanding of banner information was generally moderate rather than high. Across the full sample, 29% reported low understanding, 40% selected the midpoint and 30% reported high understanding. Low understanding was most common among respondents in Ireland (38%), while high understanding was most common in Poland (40%). Compared with the overall figures, this suggests that comprehension of consent language varies across countries.

5

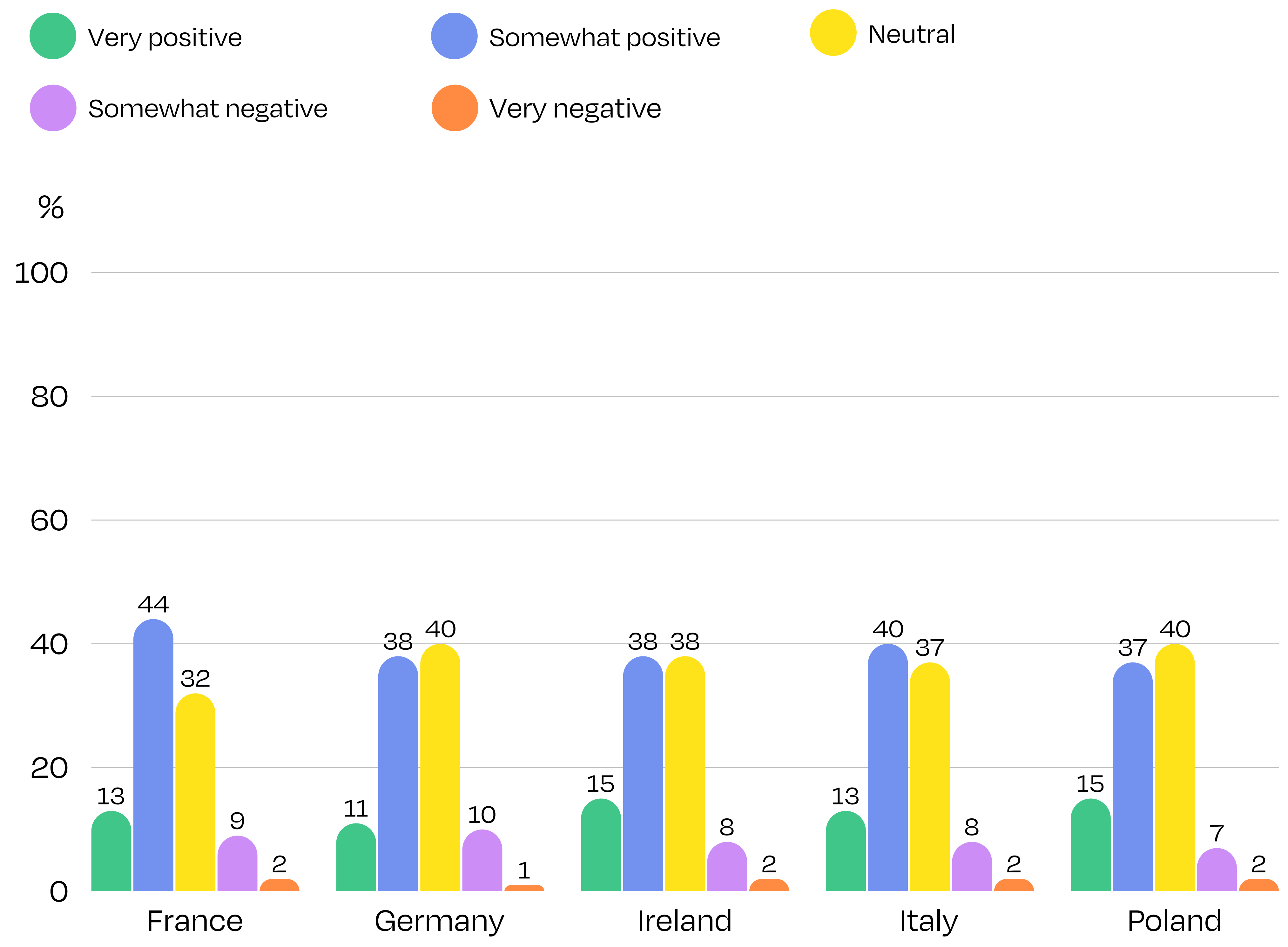
Alternatives: contextual advertising and browser-level consent

User Comfort with Contextual Advertising



Compared with current banner practices, respondents expressed greater openness to contextual advertising. Overall, 42% said they would feel comfortable with ads based only on the content being viewed, while 15% said they would feel uncomfortable and 39% were neutral. Ireland stood out as the most comfortable country at 52%, 10 percentage points above the total sample.

Attitudes toward non-personalised advertising without cookie banners

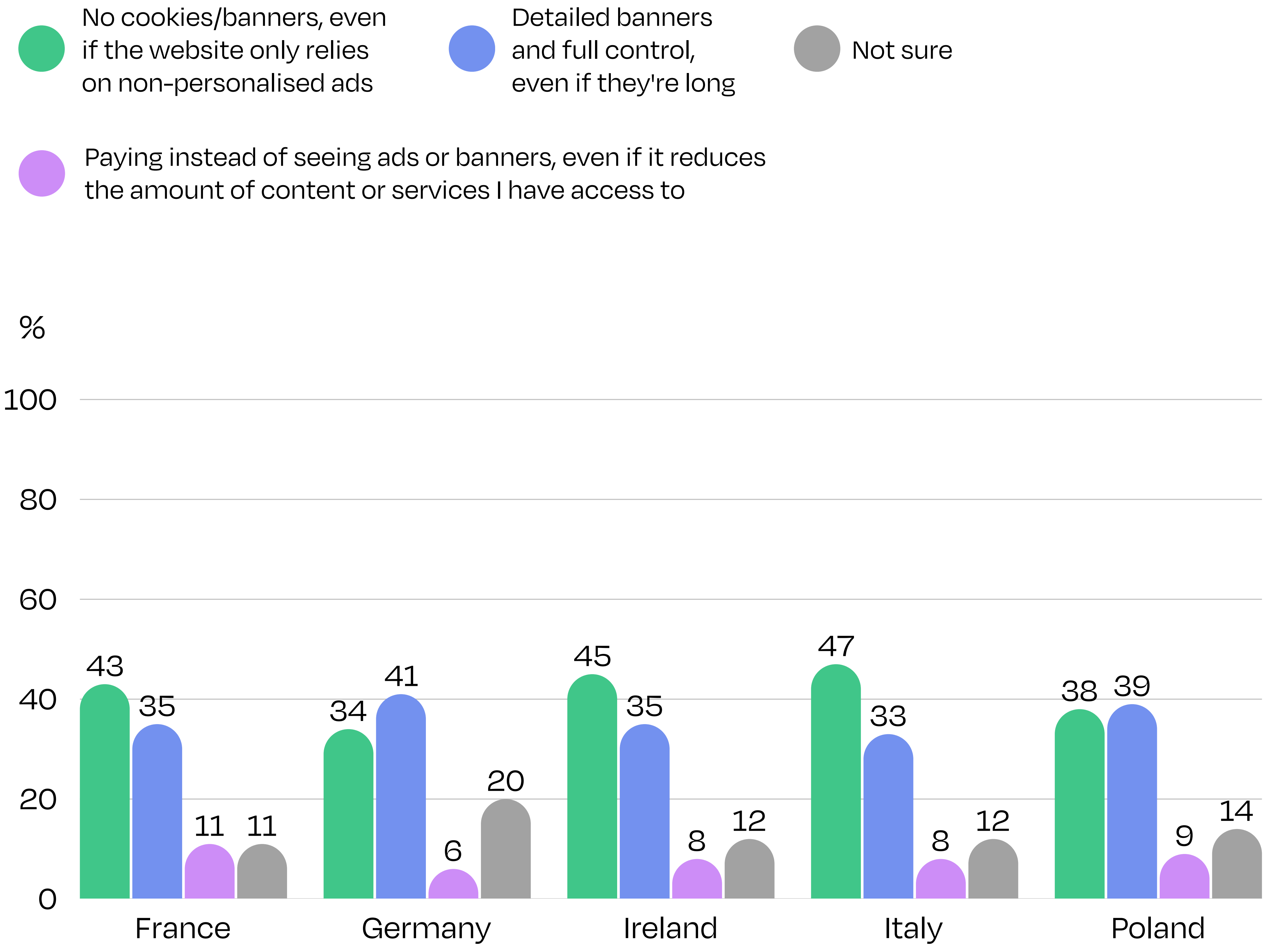


Support was higher when non-personalised advertising was combined with a **simpler user experience**. If websites relied only on non-personalised advertising and no longer displayed cookie banners, over half (52%) of respondents said they would feel positive about this approach, while 10% said they would feel negative. This suggests that consumers might be supportive of simplified cookie consent banner rules which would include exemptions for contextual advertising, thus reducing the number of banners across the web.

Views were more divided when respondents were asked to choose between different models: 41% preferred websites to use no cookies or banners and rely only on non-personalised advertising, while 36% preferred detailed banners that offer full control, even if they are long. Meanwhile, only 8% preferred paying for access instead of seeing ads or banners.

A significant share of respondents are cautious about browser-level consent once the practical consequences are considered. For example, 41% think that automatic browser rejection of tracking would lead many websites to block access or require payment, compared with 28% who think content would still be provided for free without tracking.

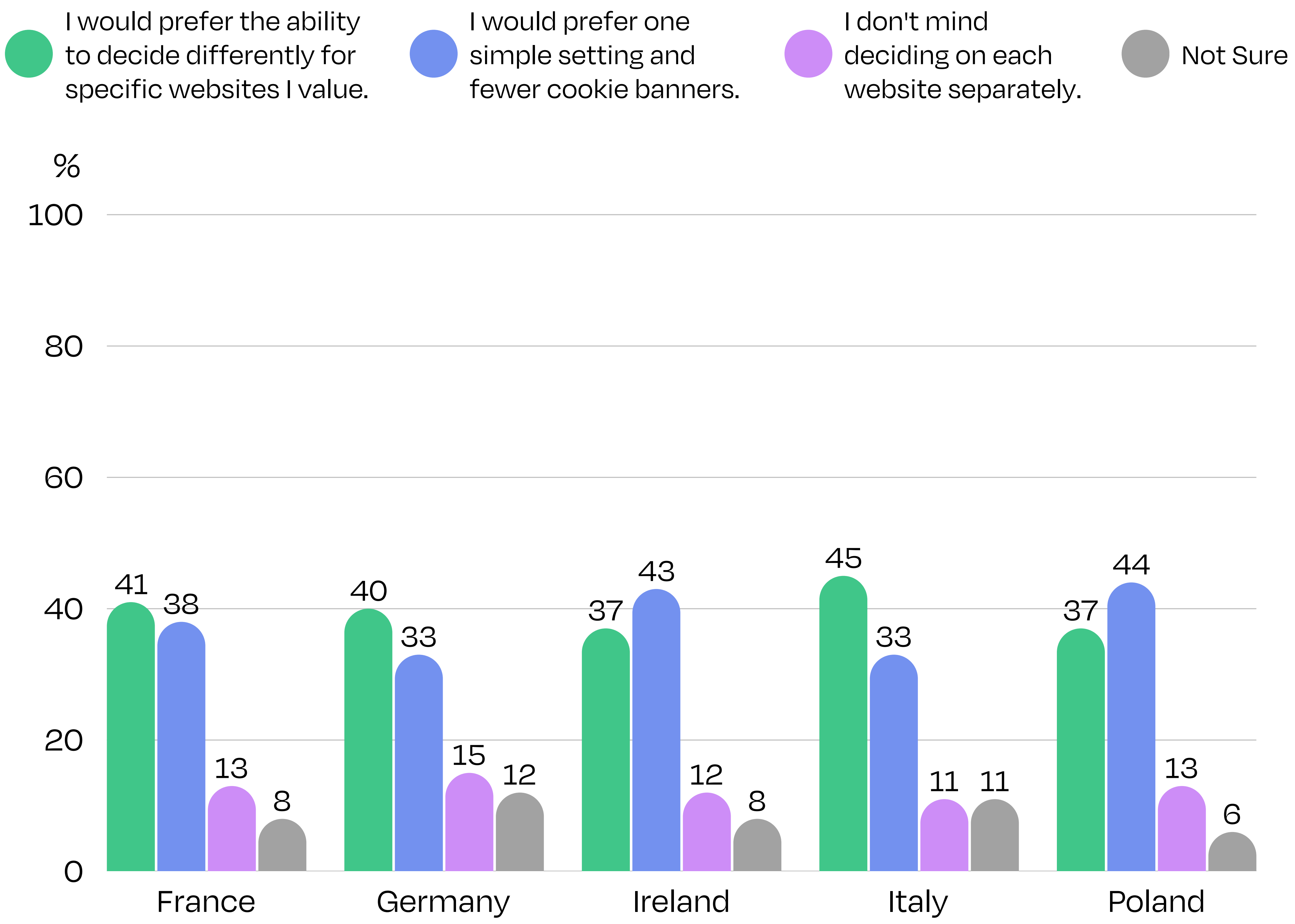
Preferred options regarding cookies



Views are also divided when browser-level consent is presented as a single, standard setting. In that scenario, 40% would prefer to decide on a case-specific basis for specific websites they value, while 38% would prefer one simple setting and fewer banners. A further 13% say they do not mind deciding on each website separately.

Although 71% say browser-managed cookie choices are appealing in principle, **the data suggests that support for browser-based simplification is not unconditional**; respondents place significant weight on flexibility and context-specific control to avoid the risk of digital exclusion.

Preferences for Different Cookie Banner Options



Country annexes

France

French respondents tended to favour free online content, particularly when it is funded by advertising that does not use personal data. Almost half (49%) selected this as their preferred model, compared with one in four (25%) who preferred free content supported by advertising that uses some personal data. Only 11% preferred paid content with no ads and no personal data use. Awareness of the trade-off was relatively high: 47% said they were fully aware that accepting cookies often helps keep websites free, while a further 33% said they had a vague idea.

Affordability appears to be an important factor in France. Around one-third of respondents (35%) said they would realistically pay between €1 and €5 per month for online news and content without ads or data tracking, and 19% said they would pay between €6 and €10. Only 11% said they would pay more than €11 per month, while 32% said they would pay nothing at all. In addition, 43% said paying separately for multiple websites would not be affordable for most people in France, while 29% said it would mainly be affordable for higher-income households.

Views of consent banners were mixed, but more often tolerant than positive. Almost half of respondents (45%) said banners are annoying but necessary to keep websites free, while 14% said they are frustrating and make websites harder to use. By contrast, 27% said they are helpful and provide useful control. When presented with a banner, 46% said they usually accept everything quickly, 24% said they reject non-essential options, and 19% said they adjust settings before continuing.

Subscription-based access attracted limited support. When respondents were asked what they would do if most websites they use each week became subscription-only as an alternative for cookies: almost half (49%) said they would rely only on free sources, while 28% said they would subscribe to a few and stop using the rest. Just 8% said they would subscribe to all or most websites.

Some 38% of French respondents said they would feel comfortable with contextual advertising, compared with 20% who would feel uncomfortable. A majority (56%) said they would feel positive if websites relied only on non-personalised advertising and removed cookie banners altogether.

Germany

German respondents showed relatively high awareness of how advertising and cookies support free online content. Three quarters (75%) were aware that advertising helps fund free news and entertainment websites, while 52% said they were fully aware that accepting cookies often helps keep websites free and a further 27% said they had a vague idea. When asked which model they prefer, 44% chose free content supported by advertising that does not use personal data, compared with 23% who preferred free content supported by advertising that uses some personal data. Only 10% preferred content with no ads and no personal data use.

In Germany, willingness to pay appears somewhat stronger than in some other markets, although free access remains central. When asked what they would do if most websites they use each week moved to a paid model as an alternative for cookies, 40% said they would rely only on free sources, while 29% said they would subscribe to a few and stop using the rest. Just 13% said they would subscribe to all or most websites.

Attitudes to cookie banners were measured rather than positive. Almost half of respondents (48%) said they are annoying but necessary to keep websites free, while 15% said they are frustrating and make websites harder to use. Only 19% said they are helpful. When shown a banner, 32% said they usually accept everything quickly, while 30% said they reject non-essential options and another 30% said they adjust settings before continuing. High understanding of the information shown on banners was limited to 30%.

German respondents were also more open to simpler alternatives, while still placing value on control. Around 38% said they would feel comfortable with contextual advertising, compared with 15% who would feel uncomfortable. If websites relied only on non-personalised advertising and removed cookie banners altogether, 48% said they would feel positive. While central browser management is appealing in principle (65%), support becomes more qualified when practical trade-offs are introduced. Although 71% said they would trust their browser at least somewhat to communicate their choices, respondents were less supportive of a single uniform approach in practice: 40% preferred the flexibility to make different choices for specific websites, compared with 33% who preferred one simplified setting across all sites. This suggests the headline support reflects an initial preference for convenience, rather than clear backing for a universal browser-level solution.

Payment expectations remained concentrated at lower price points. Around 32% said they would realistically pay between €1 and €5 per month for online news and content without ads or data tracking, and 21% said they would pay between €6 and €10. Around 26% said they would pay nothing at all, while 15% said they would pay more than €11 per month. Views on affordability were relatively balanced: 32% said paying separately for multiple websites would mainly be affordable for higher-income households, 29% said it would not be affordable for most people and 27% said it would be affordable for most people.

Ireland

Irish respondents were relatively price-sensitive, even though lower-cost paid access attracted some support. Around 44% said they would realistically pay between €1 and €5 per month for online news and content without ads or data tracking, and 17% said they would pay between €6 and €10. Only 10% said they would pay more than €11 per month, while 27% said they would pay nothing at all. Affordability was a clear constraint: 52% said paying separately for multiple websites would not be affordable for most people in Ireland, while 28% said it would mainly be affordable for higher-income households.

RAt the same time, Irish respondents showed a clear preference for free online content, especially when it is funded by advertising that does not use personal data. Seven in ten (70%) were aware that advertising helps keep news and entertainment websites free, while 39% said they were fully aware that accepting cookies often supports free access and a further 33% said they had a vague idea. When asked about their preferred model, 54% chose free content supported by ads that do not use personal data, compared with 20% who preferred free content supported by advertising that uses some personal data. Only 10% preferred paid content with no ads and no personal data use.

Cookie banners generated more acceptance than enthusiasm. Almost half of respondents (49%) said they are annoying but necessary to keep websites free, while 19% said they are frustrating and make websites harder to use. One in five (20%) said they are helpful and provide useful control. When shown a banner, 38% said they usually accept everything quickly, 36% reject non-essential options, and 18% adjust settings before continuing. High understanding of the information shown on banners was limited to 25%.

Support for subscriptions remained limited overall. When respondents were asked what they would do if most websites they use each week moved to a paid model as an alternative for cookies: 45% said they would rely only on free sources, while 33% said they would subscribe to a few and stop using the rest. Just 8% said they would subscribe to most websites.

Around 52% of respondents said they would feel comfortable with contextual advertising, compared with 12% who would feel uncomfortable. If websites relied only on non-personalised advertising and removed cookie banners altogether, 52% said they would feel positive. While centralized browser-level consent holds surface-level appeal for convenience (74% said this would be appealing, and 66% would trust their browser to communicate their choices), the broader data suggests this is an initial reaction rather than unconditional backing, as users remain highly sensitive to the risk of restricted access.

Italy

Italy appears among the more subscription-resistant markets in the group. When respondents were asked what they would do if most websites they use each week moved to a paid model as an alternative for cookies: 49% said they would rely only on free sources, while 23% said they would subscribe to a few and stop using the rest. Just 4% said they would subscribe to all or most websites.

That sits alongside a strong preference for free online content funded in a more privacy-conscious way. Nearly seven in ten (69%) were aware that advertising helps keep news and entertainment websites free, while 51% said they were fully aware that accepting cookies often supports free access and a further 30% said they had a vague idea. When asked about their preferred model, a clear majority (59%) chose free content supported by ads that do not use personal data. By comparison, 17% preferred free content supported by advertising that uses some personal data, while just 7% preferred paid content with no ads and no personal data use.

Cookie banners were more often tolerated than welcomed in Italy. Just over half of respondents (51%) said they are annoying but necessary to keep websites free, while 19% said they are frustrating and make websites harder to use.

Only 13% said they are helpful. When shown a banner, 35% said they usually accept everything quickly, 31% reject non-essential options, and 21% adjust settings before continuing.

Around 43% of Italian respondents said they would feel comfortable with contextual advertising, compared with 14% who would feel uncomfortable. If websites relied only on non-personalised advertising and removed cookie banners altogether, 53% said they would feel positive. 70% said they would trust their browser to communicate their choices to news websites on their behalf, although 45% preferred the flexibility to decide differently for specific websites, compared with 33% who preferred one simplified setting across all sites.

As elsewhere, willingness to pay was concentrated at lower price points. Around 38% said they would realistically pay between €1 and €5 per month for online news and content without ads or data tracking, and 15% said they would pay between €6 and €10. Fewer than one in ten (8%) said they would pay more than €11 per month, while 32% said they would pay nothing at all. Affordability was a clear constraint: 51% said paying separately for multiple websites would not be affordable for most people in Italy, while 25% said it would mainly be affordable for higher-income households.

Poland

Affordability is a central theme in Poland. Around 41% said they would realistically pay between €1 and €5 per month for online news and content without ads or data tracking, and 23% said they would pay between €6 and €10. Around 13% said they would pay more than €11, while 17% said they would pay nothing at all. At the same time, half of respondents said paying separately for multiple websites would not be affordable for most people in Poland, while a further 24% said it would be affordable only for higher-income households.

Even so, Polish respondents showed a clear preference for free online content, particularly when it is funded by advertising that does not use personal data. Around two thirds (68%) were aware that advertising helps keep free news and entertainment websites accessible. Awareness of the cookie trade-off was also relatively high: 44% said they were fully aware that accepting cookies often helps fund free access, while a further 34% said they had a vague idea. When asked about their preferred model, 47% chose free content supported by ads that do not use personal data, compared with 18% who preferred free content supported by advertising that uses some data. Only 12% preferred paid, ad-free content with no personal data use.

That preference for free access also shaped responses to subscription models. When respondents were asked what they would do if most websites they use each week moved to a paid model as an alternative for cookies: 40% said they would rely only on free sources, while 27% said they would subscribe to a few and stop using the rest. Just 11% said they would subscribe to all or most websites.

Views of cookie banners in Poland were again more pragmatic than positive. Almost half of respondents (48%) said they are annoying but necessary to keep websites free, while 16% said they are frustrating and disruptive. Around 21% said they are helpful and provide useful control. When shown a banner, 43% said they usually accept everything quickly, 36% said they adjust settings, and 13% said they reject non-essential options.

39% of Polish respondents said they would feel comfortable with contextual advertising, compared with 16% who would feel uncomfortable. If websites relied only on non-personalised advertising and removed cookie banners altogether, 52% said they would feel positive. Similarly, while browser-level consent is appealing in principle (74% find it appealing and 75% would trust their browser), the overarching affordability constraints in Poland suggest this support is conditional on not losing free access to content.

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