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Online platforms and digital advertising market study

The Competition and Markets Authority has completed its market study into online platforms and the digital advertising market in the UK.

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Case type: **Markets (/cma-cases?case_type=markets)**

Case state: **Closed (/cma-cases?case_state=closed)**

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Administration timetable

Date	Action
1 July 2020	Publication of final report and decision not to make a market investigation reference
12 February 2020	Consultation on interim report closed
18 December 2019	Publication of interim report and consultation on whether to make a market investigation reference
30 July 2019	Deadline for responses to the invitation to comment
3 July 2019	Launch of market study

Final report

1 July 2020: We have published the final report of our market study into online platforms and digital advertising. We have found that competition is not working well in these markets, leading to substantial harm for consumers and society as a whole.

We recommend that the government passes legislation to establish a new pro-competition regulatory regime.

- Final report (https://assets.publishing.service.gov.uk/media/5fa557668fa8f5788db46efc/Final_report_Digital_ALT_TEXT.pdf) (1.7.20)
- Appendix A: the legal framework (https://assets.publishing.service.gov.uk/media/5fe494e98fa8f56aed3d5e94/Appendix_A_-_The_legal_framework_v2_-_WEB_-.pdf) (1.7.20)
- Appendix B: summary of responses to our interim report consultation (https://assets.publishing.service.gov.uk/media/5efb1c5e3a6f4023c52b800b/Appendix_B_-_Summary_of_responses_to_our_consultation_v.2.pdf) (1.7.20)
- Appendix C: market outcomes (https://assets.publishing.service.gov.uk/media/5fe49506e90e0712011cb4ea/Appendix_C_-_Market_Outcomes_v.12_WEB_-.pdf) (1.7.20)
- Appendix D: profitability of Google and Facebook (https://assets.publishing.service.gov.uk/media/5fe4951c8fa8f56af8e88105/Appendix_D_Profitability_of_Google_and_Facebook_non-confidential_WEB.pdf) (1.7.20)
- Appendix E: ecosystems of Google and Facebook (https://assets.publishing.service.gov.uk/media/5fe49531d3bf7f089e48dec9/Appendix_E_Ecosystems_v.2_WEB.pdf) (1.7.20)
- Appendix F: the role of data in digital advertising (https://assets.publishing.service.gov.uk/media/5fe495438fa8f56af97b1e6c/Appendix_F_-_role_of_data_in_digital_advertising_v.4_WEB.pdf) (1.7.20)
- Appendix G: the role of tracking in digital advertising (https://assets.publishing.service.gov.uk/media/5fe49554e90e0711ffe07d05/Appendix_G_-_Tracking_and_PETS_v.16_non-confidential_WEB.pdf) (1.7.20)
- Appendix H: default positions in search (https://assets.publishing.service.gov.uk/media/5fe4956ad3bf7f089e48deca/Appendix_H_-_search_defaults_v.6_WEB.pdf) (1.7.20)

- Appendix I: search quality and economies of scale (https://assets.publishing.service.gov.uk/media/5fe4957c8fa8f56aeff87c12/Appendix_I_-_search_quality_v.3_WEB_.pdf) (1.7.20)
- Appendix J: Facebook Platform and API access (https://assets.publishing.service.gov.uk/media/5efb1dd2d3bf7f7699160dd6/Appendix_J_-_Facebook_Platform_and_API_access_v4.pdf) (1.7.20)
- Appendix K: consumer controls over platforms' data collection (https://assets.publishing.service.gov.uk/media/5fe49595d3bf7f089f9998ce/Appendix_K_-_consumer_controls_over_platforms__data_collection_WEB.pdf) (1.7.20)
- Appendix L: summary of research on consumers' attitudes and behaviour (https://assets.publishing.service.gov.uk/media/5efb1e07e90e075c5d587c0b/Appendix_L_-_Overview_of_Academic_Research_and_Consumer_Surveys__v3_.pdf) (1.7.20)
- Appendix M: intermediation in open display advertising (https://assets.publishing.service.gov.uk/media/5fe495c28fa8f56afaf406d4/Appendix_M_-_intermediation_in_open_display_advertising_WEB.pdf) (1.7.20)
- Appendix N: understanding advertiser demand for digital advertising (https://assets.publishing.service.gov.uk/media/5fe495d3e90e071205803985/Appendix_N__-_understanding_advertiser_demand_for_digital_advertising_WEB.pdf) (1.7.20)
- Appendix O: measurement issues in digital advertising (https://assets.publishing.service.gov.uk/media/5fe495ede90e071205803986/Appendix_O_-_measurement_issues_in_digital_advertising_WEB.pdf) (1.7.20)
- Appendix P: specialised search (https://assets.publishing.service.gov.uk/media/5fe496018fa8f56af2a85fea/Appendix_P_-_specialised_search_v.8_WEB.pdf) (1.7.20)

- Appendix Q: exploitation of market power (https://assets.publishing.service.gov.uk/media/5fe49614e90e0711ffe07d06/Appendix_Q_on_exploitation_of_market_power_in_search_and_display_v.5_Redacted_WEB.pdf) (1.7.20)
- Appendix R: fees in the adtech stack (https://assets.publishing.service.gov.uk/media/5fe49625e90e071207e10eff/Appendix_R_-_fees_in_the_adtech_stack_WEB.pdf) (1.7.20)
- Appendix S: the relationship between large digital platforms and publishers (https://assets.publishing.service.gov.uk/media/5efb22fbd3bf7f768fdcdfae/Appendix_S_-_the_relationship_between_large_digital_platforms_and_publishers.pdf) (1.7.20)
- Appendix T: our approach to assessing data remedies (https://assets.publishing.service.gov.uk/media/5efb4d513a6f4023cf12fc8b/Appendix_T_-_Principles_for_evaluating_data_remedies.pdf) (1.7.20)
- Appendix U: supporting evidence for the code of conduct (https://assets.publishing.service.gov.uk/media/5efb5fab3a6f4023d242ed4f/Appendix_U_-_The_Code_v.6.pdf) (1.7.20)
- Appendix V: assessment of pro-competition interventions in general search (https://assets.publishing.service.gov.uk/media/5fe36a18d3bf7f08a02c87f6/Appendix_V__-__assessment_of_pro-competition_interventions_in_general_search_1.7.20.pdf) (1.7.20)
- Appendix W: assessment of pro-competition interventions in social media (https://assets.publishing.service.gov.uk/media/5fe36a378fa8f56af53c5d68/Appendix_W_-_assessment_of_pro-competition_interventions_in_social_media_1.7.20.pdf) (1.7.20)
- Appendix X: assessment of pro-competition interventions to enable consumer choice over personalised advertising (https://assets.publishing.service.gov.uk/media/5fe36a65

8fa8f56af0ac66f2/Appendix_X__-__assessment_of_pro-competition_interventions_to_enable_consumer_choice_over_personalised_advertising_1.7.20.pdf) (1.7.20)

- Appendix Y: choice architecture and Fairness by Design (https://assets.publishing.service.gov.uk/media/5fe36ab9d3bf7f0898e0776c/Appendix_Y_-_choice_architecture_and_Fairness_by_Design_1.7.20.pdf) (1.7.20)
- Appendix Z: assessment of potential data-related interventions in digital advertising markets (https://assets.publishing.service.gov.uk/media/5efc3f7ae90e075c5aeb9947/Appendix_Z_-_Data_related_interventions_in_digital_advertising_markets.pdf) (1.7.20)
- Appendix ZA: assessment of potential pro-competition interventions to address market power in open display advertising (https://assets.publishing.service.gov.uk/media/5efc3f5de90e075c4fa0ac0a/Appendix_ZA_-_Separation_remedies_AD_TECH_SEPARATION_ONLY_v.6.pdf) (1.7.20)
- Glossary (https://assets.publishing.service.gov.uk/media/5efc5cad3a6f4023d3b7a866/Final_Report_Glossary.pdf) (1.7.20)
- Qualitative research report prepared by Jigsaw Research (https://assets.publishing.service.gov.uk/media/5efb3fded3bf7f769d2695af/Digital_Advertising_Services_Research.pdf) (1.7.20)
- Press release: New regime needed to take on tech giants (https://www.gov.uk/government/news/new-regime-needed-to-take-on-tech-giants) (1.7.20)
- Presentation slides: summary of final report (https://assets.publishing.service.gov.uk/media/5f6df85be90e0747c22710b2/CMA_Online_Platforms_and_Digital_Advertising_market_study_presentation__web_.pdf) (1.10.20)

Responses to interim report

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- A broadcaster (https://assets.publishing.service.gov.uk/media/5e8cae09d3bf7f1fb7b91c31/200319_-_A_Broadcaster_s_Response_to_the_interim_report-.pdf) (8.4.20)
- A digital advertising service provider (https://assets.publishing.service.gov.uk/media/5e8cacb0d3bf7f1fb1604074/A_Digital_Advertising_Service_Provider_.pdf) (8.4.20)
- A European telecommunications provider (https://assets.publishing.service.gov.uk/media/5e8cacf186650c18c9666614/A_European_Telecommunications_Provider.pdf) (8.4.20)
- An ICSS provider (https://assets.publishing.service.gov.uk/media/5e8cac7bd3bf7f1fb82927b8/200211_-_An_ICSS_Provider_s_Response_to_the_Interim_Report_-_NON-CONFIDENTIAL.pdf) (8.4.20)
- Small advertiser A (https://assets.publishing.service.gov.uk/media/5e8caf81d3bf7f1fbbe1e317/200211_-_A_small_advertiser_-_Response_to_interim_report.pdf) (8.4.20)
- Small advertiser B (https://assets.publishing.service.gov.uk/media/5e8cafbdd3bf7f1fb1604077/200212_A_small_advertiser_s_response_to_interim_report.pdf) (8.4.20)
- Small advertiser C (https://assets.publishing.service.gov.uk/media/5e8cb0c0e90e07077abf9a3b/200208_-_A_Small_Advertiser_s_Response_to_Interim_report.pdf) (8.4.20)
- Small advertiser D (https://assets.publishing.service.gov.uk/media/5e8d974ee90e07076f0ad7be/200218_A_Small_Advertiser_s_Response_to_Interim_Report.pdf) (8.4.20)

- Small advertiser E (https://assets.publishing.service.gov.uk/media/5e8d97fc86650c18c7b7014b/A_Small_Advertiser_s_Response_.pdf) (8.4.20)
- An online travel comparison service (https://assets.publishing.service.gov.uk/media/5e8cacd4d3bf7f1fb5b9fee8/An_Online_Travel_Comparison_Service.pdf) (8.4.20)
- 51Degrees (https://assets.publishing.service.gov.uk/media/5e8c595c86650c18c966660e/200212_51Degrees_Response_to_Interim_Report-.pdf) (8.4.20)
- Advertising Association (https://assets.publishing.service.gov.uk/media/5e8c59a7d3bf7f1fb7b91c23/200212_AA_Interim_Report_Response.pdf) (8.4.20)
- Age Verification Providers Association (https://assets.publishing.service.gov.uk/media/5e8c5eb2d3bf7f1fb82927ad/200217-_Age_Verification_Providers_Association_Response-.pdf) (8.4.20)
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- Arete Research (https://assets.publishing.service.gov.uk/media/5e8c5fb1d3bf7f1fafe7c8eb/200217-_Arete_Reasearch_Response_to_Interim_Report-.pdf) (8.4.20)
- Awin (https://assets.publishing.service.gov.uk/media/5e8c5fdae90e070771c6bae7/200212_Awin_Response_to_Interim_Report.pdf) (8.4.20)
- Barclays (https://assets.publishing.service.gov.uk/media/5e8c624c86650c18c2e41f02/200219_Barclays_Response_to_Interim_report-.pdf) (8.4.20)
- Baylis Media (https://assets.publishing.service.gov.uk/media/5e8c626

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- Beeswax (https://assets.publishing.service.gov.uk/media/5e8c6284e90e070777bd56ef/200211_Beeswax_Response_to_Interim_Report.pdf) (8.4.20)
- Bradbury Harper Ltd (https://assets.publishing.service.gov.uk/media/5e8c8de4e90e07077e36158b/200209_-_Bradbury_Harper_Ltd_-_Response_to_Interim_Report.pdf) (8.4.20)
- Brave (https://assets.publishing.service.gov.uk/media/5e8c62aee90e07077e361586/200212_Brave_Interim_Report_Response-.pdf) (8.4.20)
- British Brands Group (https://assets.publishing.service.gov.uk/media/5e8c6300e90e07077d673f46/200212_BBG_Response_to_Interim_Report.pdf) (8.4.20)
- BT (https://assets.publishing.service.gov.uk/media/5e8c7e5fe90e070776797277/200212_BT_Interim_report_Response_NON-CONFIDENTIAL.pdf) (8.4.20)
- Business Information Risk Management Consulting (https://assets.publishing.service.gov.uk/media/5e8c8e08d3bf7f1fba0d70c4/200212_BIRMC_s_Response_to_CMA_Online_platforms_and_digital_advertising_Interim_Report.pdf) (8.4.20)
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- Developers Alliance (https://assets.publishing.service.gov.uk/media/5e8c80c2e90e07077c089ee3/200212_Developers_Alliance_Response_to_Interim_Report_NON-CONFIDENTIAL.pdf) (8.4.20)
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- Digital Policy Alliance (https://assets.publishing.service.gov.uk/media/5e8c932ee90e070774c61fdd/DPA_Submission_to_CMA_March_2020.pdf) (8.4.20)
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- Facebook (https://assets.publishing.service.gov.uk/media/5e8c827ae90e070774c61fdb/Facebook_response_to_interim_report_with_cover_letter.pdf) (8.4.20)
- Google (https://assets.publishing.service.gov.uk/media/5e8c8290d3bf7f1fb7b91c2c/200212_Google_response_to_interim_report.pdf) (8.4.20)
- Horizon Digital Economy Research Institute (https://assets.publishing.service.gov.uk/media/5e8c82afe90e070773c17f81/200211_Horizon_response_to_interim_report.pdf) (8.4.20)
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- Oracle Moat (https://assets.publishing.service.gov.uk/media/5e8c89c1d3bf7f1fb82927b4/200219_Oracle_Response_to_Interim_Report.pdf) (8.4.20)
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- Snap Inc. (https://assets.publishing.service.gov.uk/media/5e8c8ad1d3bf7f1fb5b9fee6/Snap_Inc_.pdf) (8.4.20)
- Telefonica UK (https://assets.publishing.service.gov.uk/media/5e8c8b0986650c18cc99f213/Telefonica_UK.pdf) (8.4.20)
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- UCL Institution for Innovation and Public Purpose (https://assets.publishing.service.gov.uk/media/5e8c929986650c18c426f607/200319_IIPA_Response_to_Interim_Report_NON-CONFIDENTIAL.pdf) (8.4.20)
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- Yoti (https://assets.publishing.service.gov.uk/media/5e8c8d7de90e0707723adb6d/200313_Yoti_Response_to_Interim_Report_NON-CONFIDENTIAL_UPDATED.pdf) (8.4.20)

Penalty notice

17 January 2020: The CMA has published a notice (served 10 January 2020) of a penalty imposed on

AppNexus Europe Limited under section 174A of the Enterprise Act 2002. The CMA imposed the penalty for a failure to comply, without reasonable excuse, with the requirements imposed on AppNexus Europe Limited by a notice issued by the CMA under section 174 of the Enterprise Act 2002.

- Penalty notice (https://assets.publishing.service.gov.uk/media/5e21e70be5274a6c38aae2bc/Penalty_notice_Non-confidential.pdf) (17.1.20)

Interim report

18 December 2019: We have published an update on our online platforms and digital advertising market study, setting out our initial findings, including the concerns we have identified and the potential interventions we are considering.

We are inviting comments on our report, including on our proposal not to make a market investigation reference at this stage, by 5pm on 12 February 2020.

- Press release: CMA lifts the lid on digital giants (https://www.gov.uk/government/news/cma-lifts-the-lid-on-digital-giants) (18.12.19)
- Interim report (https://assets.publishing.service.gov.uk/media/5ed0f75bd3bf7f4602e98330/Interim_report_---_web.pdf) (18.12.19)
- Appendix A: The legal framework (https://assets.publishing.service.gov.uk/media/5df9ebf0e5274a0910cb6d7c/Appendix_A_The_legal_framework.pdf) (18.12.19)
- Appendix B: Summary of responses to our statement of scope (https://assets.publishing.service.gov.uk/media/5df9ec4140f0b60947faabd2/Appendix_B_Summary_of_responses_to_our_statement_of_scope.pdf) (18.12.19)
- Appendix C: Market outcomes (https://assets.publishing.service.gov.uk/media/5dfa0748

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- Appendix D: Profitability of Google and Facebook (https://assets.publishing.service.gov.uk/media/5df9fc49e5274a08e9fb2037/Appendix_D_Profitability_of_Google_and_Facebook.pdf) (18.12.19)
- Appendix E: The role of data (https://assets.publishing.service.gov.uk/media/5df9ecc040f0b609402e2838/Appendix_E_The_role_of_data_FINAL.pdf) (18.12.19)
- Appendix F: Consumer control over data collection (https://assets.publishing.service.gov.uk/media/5df9ecf440f0b60943263ebe/Appendix_F_Consumer_control_over_data_collection.pdf) (18.12.19)
- Appendix G: Summary of research on consumers' attitudes and behaviour (https://assets.publishing.service.gov.uk/media/5df9ed39e5274a08dbcdfe0f/Appendix_G_digital_markets_study__1_.pdf) (18.12.19)
- Appendix H: Intermediation in digital advertising (https://assets.publishing.service.gov.uk/media/5dfa172240f0b6217b108351/Appendix_H2.pdf) (18.12.19)
- Appendix I: Potential practices to be tackled through a code of conduct (https://assets.publishing.service.gov.uk/media/5df9ee9ae5274a08dc94832e/Appendix_I_digital_markets_study.pdf) (18.12.19)
- Appendix J: Potential interventions in general search (https://assets.publishing.service.gov.uk/media/5df9ef08ed915d0931d74794/Appendix_J_Potential_interventions_in_general_search_FINAL.pdf) (18.12.19)
- Appendix K: Potential interventions in social media (https://assets.publishing.service.gov.uk/media/5df9ef7e40f0b609574bca48/Appendix_K_Potential_interventions_in_social_media_FINAL.pdf) (18.12.19)
- Appendix L: Potential approaches to improving personal data mobility (https://assets.publishing.service.gov.uk/media/5df9efa2ed915d093f742872/Appendix_L_Potential_approaches_t

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- Appendix M: Potential interventions in digital advertising (https://assets.publishing.service.gov.uk/media/5df9efe1ed915d093a15d252/Appendix_M_Potential_interventions_in_digital_advertising_FINAL.pdf) (18.12.19)
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- Ecosia (https://assets.publishing.service.gov.uk/media/5db96e8be5274a4aa1a16725/Ecosia_response_to_SOS_Redacted.pdf) (30.10.19)
- Digital advertising services provider (https://assets.publishing.service.gov.uk/media/5d91ce38ed915d5565d9ce90/Digital_advertising_services_provider_-_Response_to_SoS2.pdf) (30.9.19)
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- Channel 4 (https://assets.publishing.service.gov.uk/media/5d6e2842ed915d53b601637e/190730_Channel_4_-_Response_to_SoS-_Non-confidential.pdf) (11.9.19)
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- IAB UK (https://assets.publishing.service.gov.uk/media/5d690706ed915d53a9995174/IAB_-_Response_to_SoS.pdf) (11.9.19)
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- Index Exchange (https://assets.publishing.service.gov.uk/media/5d7647d6ed915d5ef22b4110/190823_Index_Exchange_-_Response_to_SoS_-_non-confidential.pdf) (11.9.19)
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Launch of the study

3 July 2019: The CMA has launched a market study into online platforms and the digital advertising market in the UK. We are assessing three broad potential sources of harm to consumers in connection with the market for digital advertising:

- to what extent online platforms have market power in user-facing markets, and what impact this has on consumers
- whether consumers are able and willing to control how data about them is used and collected by online platforms
- whether competition in the digital advertising market may be distorted by any market power held by platforms

We are inviting comments by 30 July 2019 on the issues raised in the statement of scope, including from interested parties such as online platforms, advertisers, publishers, intermediaries within the ad tech stack, representative professional bodies, government and consumer groups.

- Market study notice (https://assets.publishing.service.gov.uk/media/5d1b28b2ed915d0bc413ba80/Market_Study_Notice.pdf) (3.7.19)
- Statement of scope (https://assets.publishing.service.gov.uk/media/5d1b297e40f0b609dba90d7a/Statement_of_Scope.pdf) (3.7.19)

Personal information

The CMA may collect, use and share personal data for its market studies under the Enterprise Act 2002. This includes processing personal data for the purposes of the General Data Protection Regulation and the Data Protection Act 2018.

For more information about how the CMA handles personal information, see the CMA's Personal Information Charter (https://www.gov.uk/government/organisations/competition-and-markets-authority/about/personal-information-charter).

Digital markets strategy

This study is part of the CMA's Digital Markets Strategy, which sets out our broad approach to protecting consumers in the digital economy while ensuring robust, competitive digital markets.

- CMA Digital markets strategy (https://www.gov.uk/government/publications/competition-and-markets-authoritys-digital-markets-strategy) (3.7.19)
- Press release: CMA launches digital markets strategy (https://www.gov.uk/government/news/cma-launches-digital-markets-strategy) (3.7.19)

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