



Ad Blocking: Who Blocks Ads, Why and How to Win Them Back

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Who Blocks Ads, Why, and How to Win Them Back

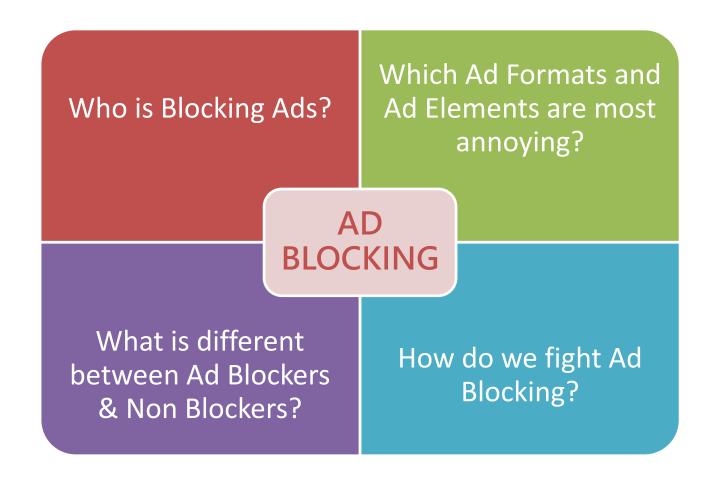
- Ad blocking is a problem that can be contained. The IAB study "Who Blocks Ads, Why, and How to Win Them Back" shows that two-thirds of consumers using ad blockers are open to stop blocking ads and their top motivators would be: messages that content will be blocked unless the ad blocker is turned off, assuring that ads do not auto-play, block content, contain malware/viruses or slow browsing.
- Who Blocks Ads?
 - 26% of Users Surveyed Block Ads on Computers and tend to be Men 18-34 years old.
 - Anti-Virus Confused for Ad Blocking. Additionally, 40% think that they are using an ad blocker. The confusion comes from consumers thinking that antivirus software or pop-up blockers built into their browser are ad blockers.
 - 15% Block Ads on Smartphones and tend to be Men 18-34 years old.
- Who Does Not Block Ads?
 - Among consumers not blocking ads, 20% are past users of ad blockers. Why did they stop?
 Content being blocked and messages asking them to unblock in order to view content drove them to uninstall.
 - In addition,17% of consumers not blocking ads are at risk to start doing so. Why? Largely, for the same reasons as those of consumers currently using ad blockers, in addition to the fear of getting a virus.

Who Blocks Ads, Why, and How to Win Them Back

- Why Do Users Block Ads?
 - All users, but especially consumers using ad blockers, want uninterrupted, quick browsing and a streamlined user experience.
 - Among those that already use an ad blocker on their PC, the top reason for using it on a computer is the perception that sites are easier to navigate without ads.
 - Among those that already use an ad blocker on their smartphone, the top reason for using it on a phone is the perception that ads slow down browsing.
 - Consumers that use ad blockers tend to blame ads for slow loading pages, while those not currently using ad blockers tend to blame the content for slow loading pages.
 - Most annoying ad elements are: Ads that block content, long video ads before short videos, ads that follow down the page as the user scrolls.
 - Consumers that use ad blockers are even more annoyed by these ad elements, especially auto-start ads.
 - Users of ad blockers are less tolerant of ads.

Who Blocks Ads, Why, and How to Win Them Back

- How Do We Win Them Back?
 - Two-thirds of consumers using ad blockers are open to stop blocking ads.
 - Here's how to win back ad blockers and prevent future blocking:
 - Do's:
 - Give users control: Video skip button, thumbs up/down ratings
 - Assure users of site safety: Provide guarantees that site and ads are secure, malware and virus-free, and won't slow down browsing
 - Don'ts:
 - **Don't disrupt their flow** with: Ads that block content, long video ads before short video content, ads that follow down the page, autoplay, slow loading (especially on mobile), pop-ups, or full page ads
 - <u>In short, implement LEAN principles</u> (Light, Encrypted, AdChoice supported, Non-invasive ads), which address the a number of these key issues.
 - For the other one-third, or Loyal Blockers, use these methods to try to get them to stop:
 - Polite messaging to turn off their ad blocker in exchange for viewing content
 - Block content from users of ad blockers who do not turn off their blockers
 - In short, implement DEAL (Detect, Explain, Ask, and Lift or Limit)



Eye Tracker Lab Study

103 Consumers Adults 18 and older

- Ad Blockers
- Vulnerable
- Non Blockers

36 Websites Viewed

- High Ad Load
- Medium Ad Load
- Low Ad Load

2 Hour Sessions

- Browse 3 Sites (H, M, L)
- Replay Session
- Rate 3 Ads/Site
- Rate each Site
- Ad Blocking Survey
- QualitativeInterview

Survey				
DESKTOP/LAPTOP SAMPLE SIZE	N=1292			
TOTAL AD RATINGS	n=2584			
NO OF SITES RATED	n=36			
MOBILE SAMPLE SIZE	N=201			
TOTAL AD RATINGS	n=402			
Sample of Adults 18 and older included oversample of males 18-34 to better understand the target demographic for ad blocking.				

36 Websites were selected from an initial list of about a 1000 Websites





PERCEIVED AD LOAD

LOW Perceived Ad Load:

Websites with lower Perceived Ad Loads included site pages that:

- Average No. Page Requests = 100
- Average Ad Requests = 50
- Deliver a select few types of ad formats
- Present static ads, or ads with little-to-no animation, auto-play audio/video, expansion, or pop-up elements
- Primarily display ads that are well-blended, suited to the site, or native/agile

HIGH Perceived Ad Load:

Websites with higher Perceived Ad Loads included site pages that:

- Average No. Page Requests = 300
- Average Ad Requests = 150
- Deliver multiple ads in multiple formats simultaneously
- Present typically rich media formats ads with elements involving pop-ups, expansion, auto-play audio/video, or floating
- Ads are distinct from content; can make site feel cluttered or disconnected

Lab Study - Cell Design

- Selected List of 36 Websites were divided into 9 cells representing a mix of Content Type and Ad Load.
- 12 Websites were heavy on video content.

Content Type

Comem type
Sports
News
Science & Technology
Health & Fitness
Lifestyle, Pop-Culture & Blogging
Style, Fashion and Beauty
Home Improvement
Outdoor Living
Game/Gaming
Cars/Automobiles

WEBSITE CONTENT TYPE

ΔV		Entertainment	Information	Mixed	
PERCEIVED AD LOAD	High	4	4	4	
VED A	Medium	4	4	4	
RCE	Low	4	4	4	
P.	Total	12	12	12	36

The lab study included three free browsing portions, with consumers visiting three separate test sites. Each site was visited for 8 minutes. The sessions also included live ad testing, site testing, profiling, and concept testing.

FREE-BROWSING TASKS

Time: 24 Minutes

- Respondents Browsed 3 Sites, Varying on Perceived Ad Load:
 - High Load
 - Medium Load
 - Low Load

And varying on Content Type:

- Entertainment
- Littertailine
- Information
- Mixed

Each of the three websites browsed were some combination of Perceived Ad Load and Content Type [i.e. Entertainment-Medium Load, Information-Low Load, and Mixed-High Load].

LIVE AD RATINGS

Time: 20 Minutes

Respondents were asked to rate 3 Ads per site, by presenting a replay of session:

- Aided Recognition
- Alueu Ne
- Behavior
- Ad AttitudeAd Engagement
- Ad Persuasion
- Ad Appeal
- Ad Reactance

CITE DATINGS

Time: 10 Minutes

Respondents were asked to rate each website based on their browsing experience:

- Ad Impact on Site Experience
- Overall Site Ratings
- Satisfaction Rating
- Propensity to Block Ads on Each Site

AD BLOCKING SURVEY

Time: 10 Minutes

- Ad Blocker Profile
- Reasons for Ad Blocking
- Reasons to NOT BlockKnowledge of How Ad Blockers
- Work

 Current Experience on
- Properties with Ad Blocker
- Willingness to pay for ad free experiences

DEBRIEF

Time: 40 Minutes

- Understand Ad Reactance and Behavior:
 - Feedback on advertising overall
 - Likes and Dislikes of the Ad
 - Detailed feedback on the three sites
- Concept Feedback (Concepts were continuously developed and modified as new ideas came to light)







Quantitative Study Design (N=1493)

The quantitative study consisted of 2 sections, a Computer (N=1292) and a Smartphone (N=201) section.

FREE-BROWSING TASKS



Respondents were asked to provide their website type preferences, after which they were assigned a website to visit based on their preferences. Respondents were limited to browse the website for at least 3 minutes.

SITE RATINGS

Respondents were reconfirmed for having their ad blocker turned off

Respondents were asked to rate the site they visited, providing thoughts on:

- Ad Impact on Site Experience
- Overall Site Ratings
- Satisfaction Rating

Mobile Ad Blocking (N=201)

A part of the sample (N=201) was

likelihood to install an ad blocker)

were directed to the mobile survey.

directed to a Mobile survey. Mobile Ad Blockers and Non Blockers (with a

- Propensity to Block Ads on Each Site
- Attribution of load time

AD BLOCKING HABITS

Respondents were divided into two routes of the survey: Ad Blockers and Non Blockers.

- Ad Blocker Profile
- Reasons for Ad Blocking
- Reasons to NOT Block
- Current Experience on Properties with Ad Blocker

AD RATINGS

Respondents were asked to rate 2 Ad Types they are familiar with, and ratings on ad elements:

- Ad Type Familiarity
- Ad Attitude
- Ad Annoyance
- Ad Element Impact On Blocking

Attribution of load time on Smartphones.

CONCEPT RATINGS

Concept feedback and impact on ad blocking behaviors. Ad Blockers and Non Blockers were asked for feedback on:

- Concept impact on pausing and uninstalling ad blocker altogether.
- Preventing Non Blockers from installing an ad blocker.

AD BLOCKING HABITS

Respondents were divided into two routes of the survey: Ad Blockers and Non Blockers.

- Ad Blocker Profile
- Reasons for Ad Blocking
- Reasons to NOT Block
- Current Experience on Properties with Ad Blocker

AD RATINGS

Respondents were asked to rate 2 Ad Types they are familiar with, and ratings on ad elements:

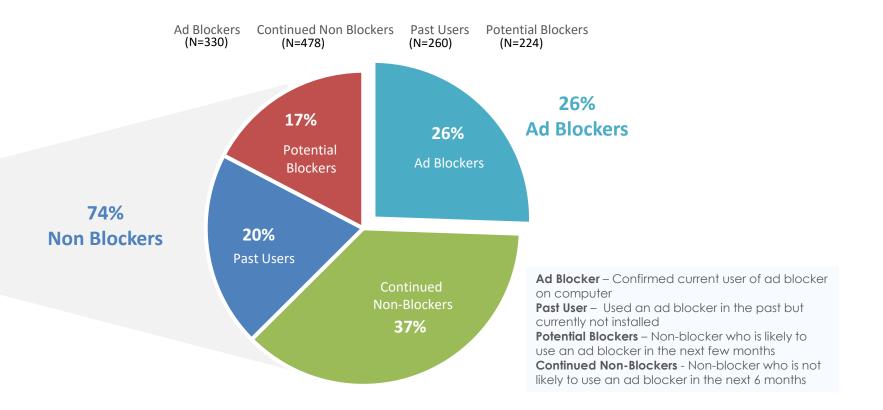
- Ad Type Familiarity
- Ad Attitude
- Ad Annoyance
- Ad Element Impact On Blocking



WHO BLOCKS ADS & WHY?

Ad Blockers & Non Blockers on Computers

Total Respondents

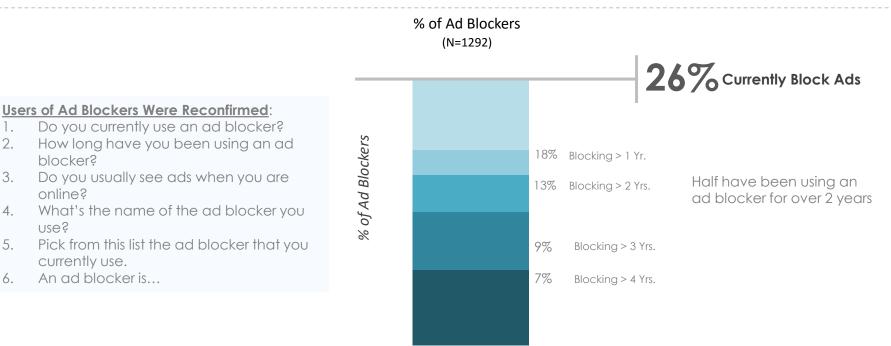


Note: Respondents were reconfirmed for ad blocking by asking about the amount of ads they see while browsing, followed by a question on the name of their ad blocker to filter out those who mistakenly thought they were using an blocker. They were then asked to pick from a list. Respondents were also given an explanation of what an ad blocker is to ensure that they were not mistaken.

40% THINK They're Using an Ad Blocker, 26% Actually Are

40% think they're using an ad blocker on their computer, however, when asked further to clarify* it turns out that 26% are actually using an ad blocker on their computer.

Some users mistakenly assume their built-in pop-up blocker within their browser or their antivirus software [i.e. McAfee, Norton, etc.] are forms of ad blocking.



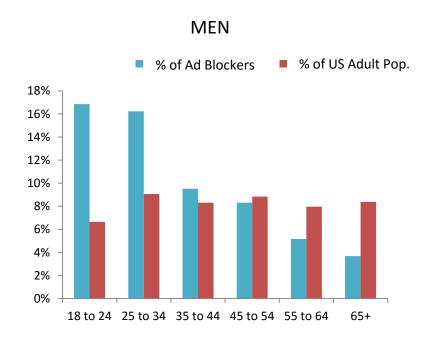
use ?

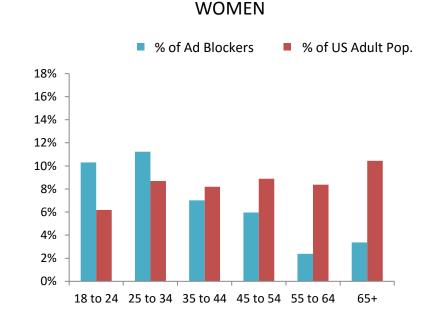
Q: How long have you been using ad blocking technologies on any of your devices?

^{*}Respondents were reconfirmed for ad blocking by asking about the amount of ads they see while browsing, followed by a question on the name of their ad blocker to filter out those who mistakenly thought they were using an blocker. They were then asked to pick from a list. Respondents were also given an explanation of what an ad blocker is to ensure that they were not mistaken.

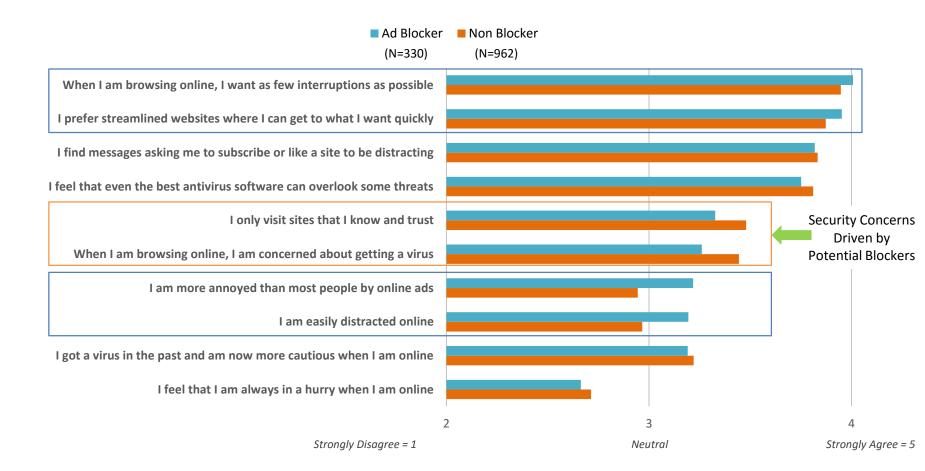
Users of Ad Blockers Are More Likely to be 18-34 Men

Population Weighted % of Ad Blockers by Gender and Age



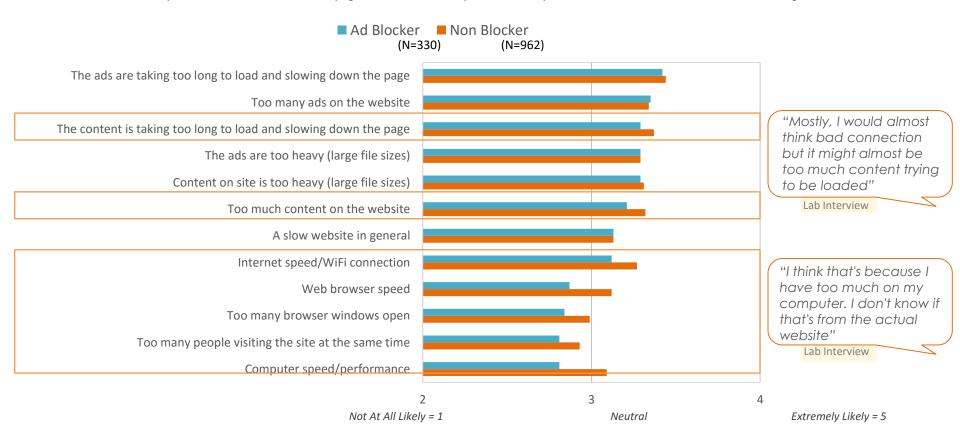


Users Want Uninterrupted, Quick Browsing
Non-Blockers are Concerned About Getting a Virus; Ad Blockers are Less Tolerant of Ads



Ads Blamed for Slow Loading Pages but Non Blockers Likely to Blame Computer or Site Content

If you were to visit a site and the page were to load slowly, what would you consider to be the reasons for slow loading?



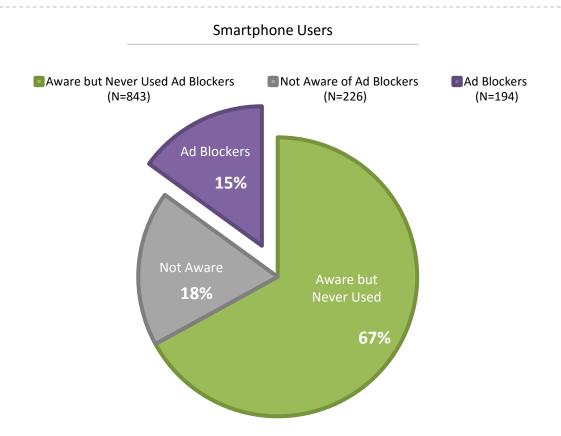
Q to Ad Blockers: If you were to visit a site with your ad blocker turned off and the page were to load slowly, what would you consider to be the reasons for slow loading? Q to Non Blockers: If you were to visit a site and the page were to load slowly, what would you consider to be the reasons for slow loading?

SMARTPHONE USERS OF AD BLOCKERS

PILOT STUDY WITH 200 USERS

15% Use Ad Blockers on Their Smartphones

A majority of smartphone users are aware of Ad Blockers but have never used them.

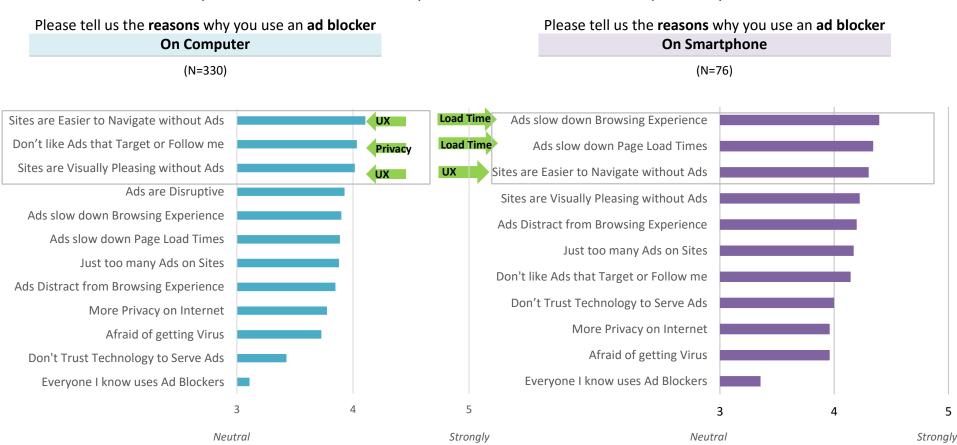


Note: Respondents were asked to provide the name of the mobile ad blocker they use to confirm usage.

Smartphone ad blockers only block ads on mobile web, not on mobile apps.

Ad Blocking on Smartphones Driven by Slow Browsing

Computer ad blockers' top reasons are UX- and privacy-based.



Agree

Agree

WHICH AD FORMATS ANNOY USERS MOST?

Overall, Most Ad Experiences Are Acceptable

Most Ad Experiences Are Acceptable



✓ Most ads are acceptable as they don't impose themselves on consumer browsing behaviors...

"I don't think ads are bad. I don't think there are bad ads. I think there are less appealing ads. There are less relevant ads."



Annoyance Is A Result Of Removing Control And Increasing Intrusion

Control can take the shape of difficulty of closing or avoiding an ad.

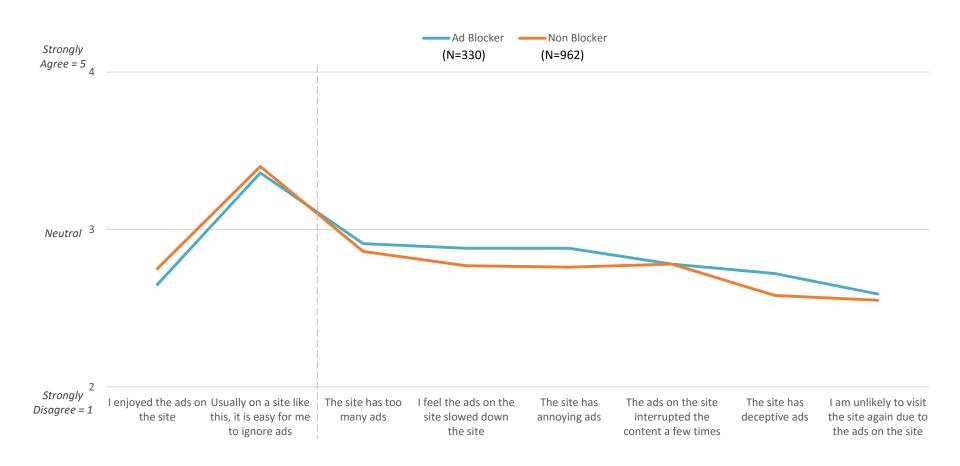


- ✓ In Video Ads, when "Skip" buttons are not offered, it makes the process of navigating to desired content a lengthy process.
- Ads that affect or interrupt the browsing experience of a site by activating [by either popping-up, sliding over, breaking apart, or playing sounds] without user initiation are also ways to remove control from the ad experience.

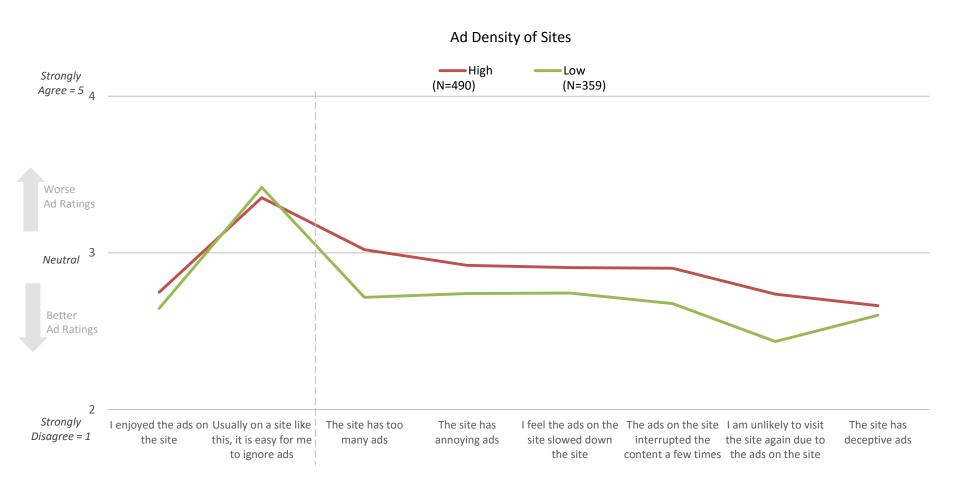
LAB DATA N=103 Ad Blockers and Non Blockers participated. 924 Live Ads were reviewed.

"I hate something that interrupts my content. I hate something that I have to watch. I noticed something the other day that I saw for the first time ever: an ad popped up in the middle of a video that you can't skip."

Sites Are Generally NOT Hated For Ads



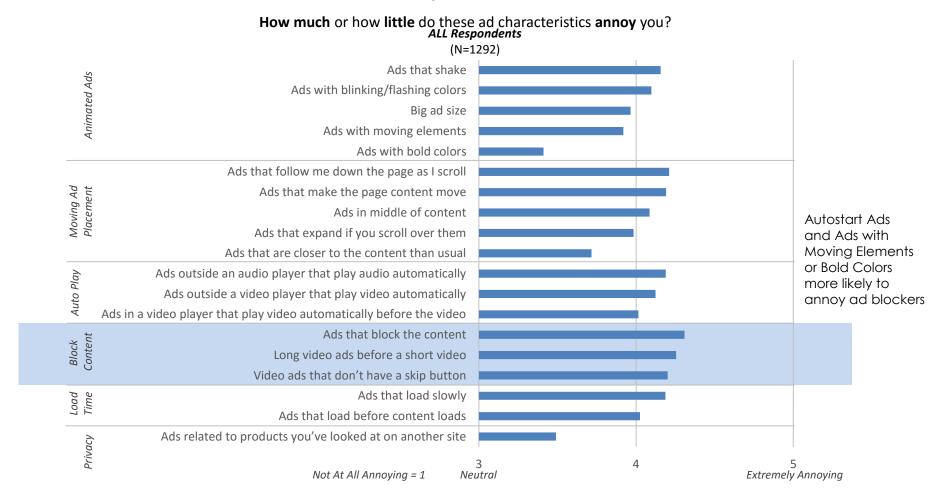
24 However, High Ad Density Sites Result In Inferior Ad Ratings



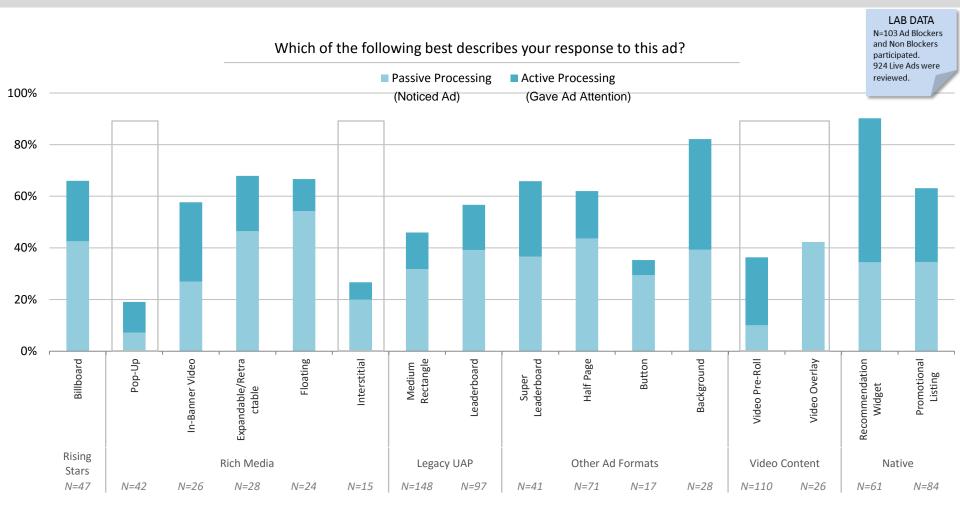
High Ad Density Sites delivered multiple ads in multiple formats simultaneously, presented typically rich media formats ads with elements involving pop-ups, expansion, auto-play audio/video or floating and contained ads that are distinct from content and could make site feel cluttered or disconnected

Ads That Block Content Annoy Users Most

Those who use ad blockers are more annoyed by these ad elements, particularly autostart ads and ads with moving elements or bold colors.



Ads That Force Attention Are Not Processed



Passive Processing is SUM of "Noticed the Ad from the corner of my eye, or periphery" & "Noticed the Ad at a glance"

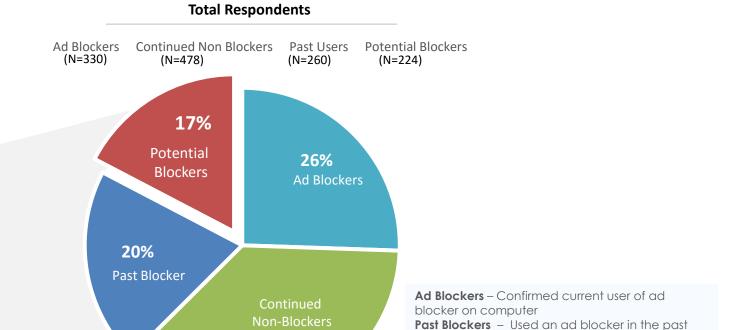
Active Processing is SUM of "Looked at the Ad" & "Clicked on the Ad"

NON-BLOCKERS: WHO IS AT RISK

TO START BLOCKING AND WHY?

A CLOSER LOOK AT POTENTIAL BLOCKERS, OR THOSE VULNERABLE TO START BLOCKING ADS

A Closer Look at Potential Blockers Or Non-Blockers Who Are Considering Installing an Ad Blocker



37%

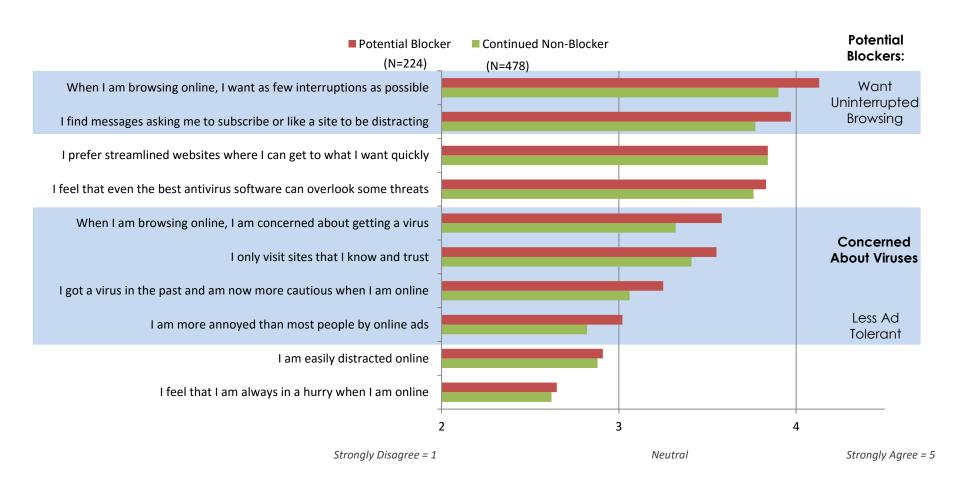
but currently not installed

Potential Blockers – Non-blocker who is likely to use an ad blocker in the next few months

Continued Non-Blockers - Non-blocker who is not likely to use an ad blocker in the next few months

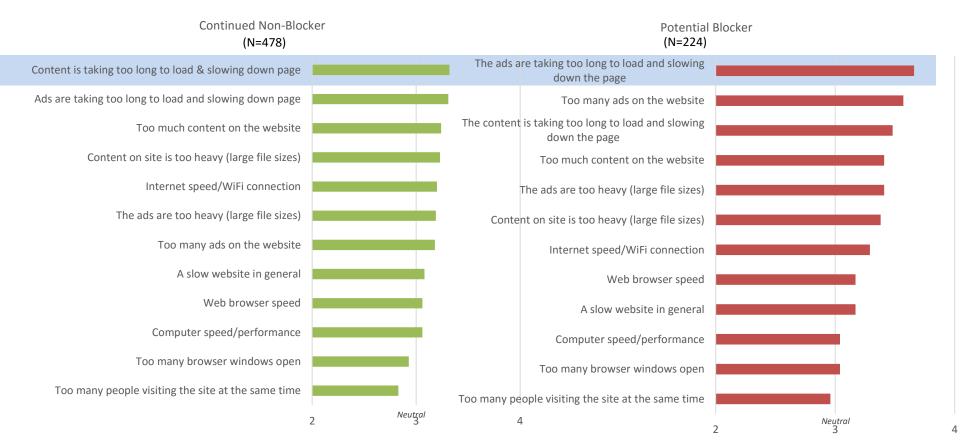
Looking Further Into Non-Blockers, Differences Emerge

Potential Blockers (those vulnerable to start blocking ads) demand uninterrupted browsing experience and are less ad tolerant, similar to Ad Blockers. They are also more concerned about viruses.



Like Ad Blockers, Potential Blockers More Likely to Blame Ads for Slow Sites; Continued Non-Blockers More Likely to Blame Content

If you were to visit a site and the page were to load slowly, what would you consider to be the reasons for slow loading?

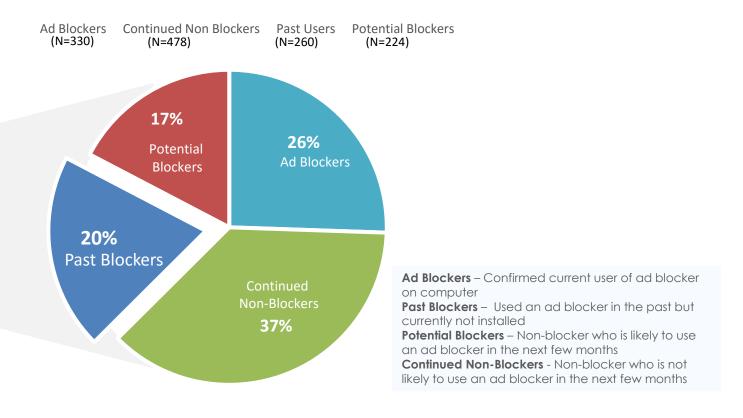


Q to Ad Blockers: If you were to visit a site with your ad blocker turned off and the page were to load slowly, what would you consider to be the reasons for slow loading? Q to Non Blockers: If you were to visit a site and the page were to load slowly, what would you consider to be the reasons for slow loading?

WHAT MADE PAST USERS TURN OFF THEIR AD BLOCKERS?

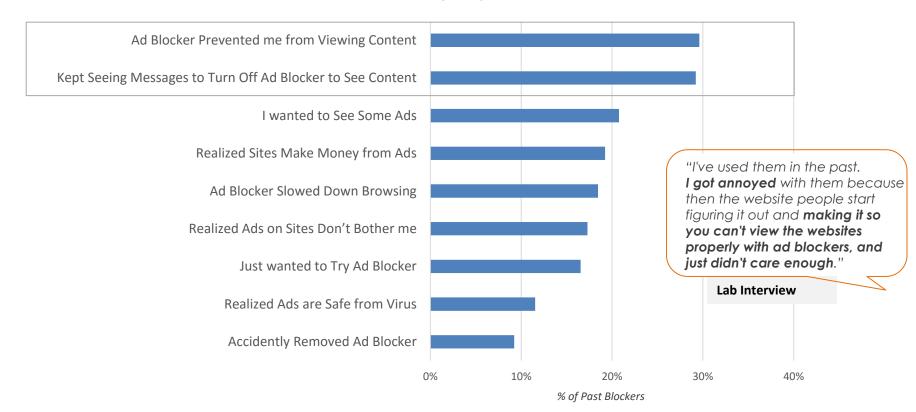
A Closer Look at Past Users of Ad Blockers

Total Respondents



Why did you stop using an ad blocker or ad blocking extension?

Past Users of Ad Blockers (N=260)

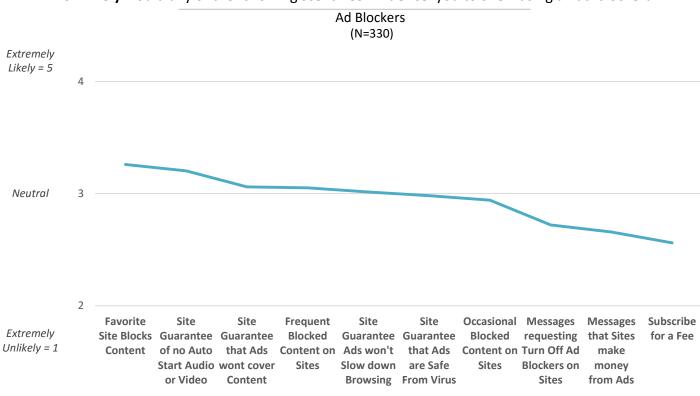


HOW DO WE FIGHT AD BLOCKING?

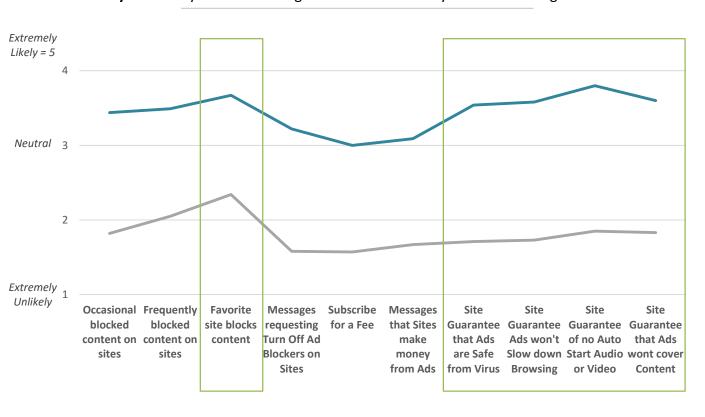
AND WIN BACK USERS OF AD BLOCKING

At a Glance, Few Unblocking Strategies Seem To Work

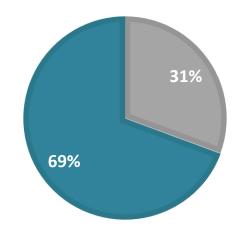




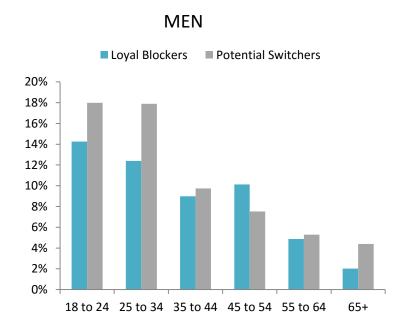
How likely would any of the following scenarios influence you to STOP using an ad blocker?

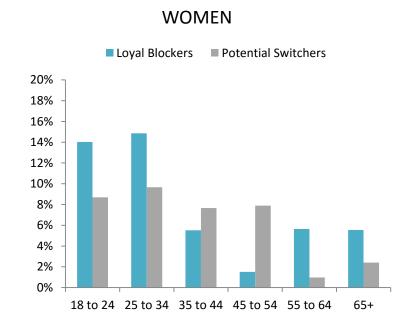


Cluster Analysis found two groups of Loyal Blockers (N=101) and Potential Unblockers (N=229)

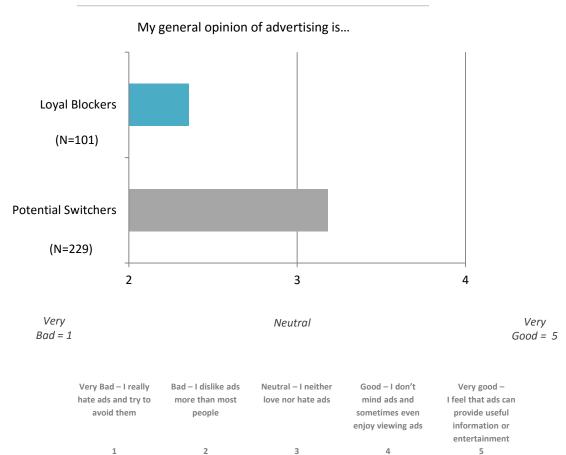


Population Weighted % of Loyals and Potential Unblockers by Gender and Age





Which of the following best describes your attitude about advertising in general



UNBLOCKING CONCEPTS:

RESPONDENTS REACTED TO AD CONCEPTS AND LEAN PRINCIPLES

Respondents were presented with the following concepts along with an explanation

- Users of ad blockers were asked how likely they would be to turn off their ad blockers.
- Non-users were asked their likelihood to start blocking ads if exposed to these ad concepts.

Ad Standards

"LEAN Ads" follow advertising standards in order to improve user interaction with online advertising.

	L IGHT-	Limit the file size of ads to reduce load times.
	ENCRYPTED -	Ensuring security standards to prevent exposure to harmful malware and viruses.
	AD CHOICE SUPPORTED-	Allow users to opt-out of certain data collection services used to create targeted ads.
	Non-invasive ads -	Eliminate Ads with irritating elements such as shaking, blinking, or automatic audio playing.

Consumer Control

Elements of control added or enhanced within ads allowing users to have choice in when or how advertising is delivered to them.



Fast Forward Ads

Fast forward to the last 5 seconds of an ad rather than skip after watching the first 5 seconds of an ad.



Notification Message

Message appears above ad that provides information on the next time an ad will appear.



Ad Ratings

Rate ads with thumbs up or thumbs down to give feedback, and get more of the ads users like. Skip button still provided.

Ad Block Messages

Websites can inform users as to why advertising is necessary for the site to function by presenting messages to either whitelist (turn OFF ad blocker) or subscribe.

Example Messaging

Active Blocking

Ad blockers are required to either Whitelist OR Subscribe

"We get it: Ads aren't what you're here for. But ads help us keep the lights on. So, add us to your ad blocker's whitelist or pay \$X per week for an ad-free version of the website. Either way, you are supporting our journalism. We'd really appreciate it."

Example Messaging

Passive Blocking

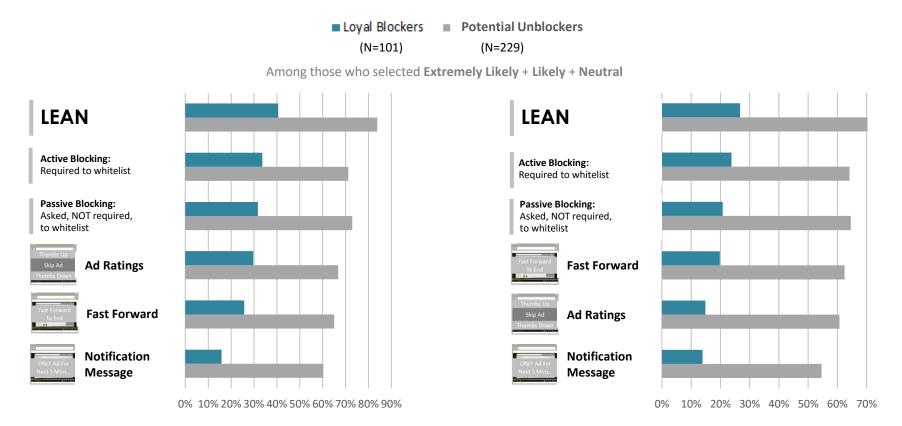
Ad blockers are asked, but NOT required to Whitelist

"We have detected that you are using an ad blocking plugin in your browser. The revenue we earn by the advertisements is used to manage this website, we request you to whitelist our website."

Concepts Resonate With Potential Unblockers

Likelihood to turn off/pause ad blocker

Likelihood to **stop** using ad blocker **altogether**



LEAN Standards Have Greatest Impact

A universally liked idea, LEAN promotes the 4 key areas that consumers care for the most. As described, Ad blockers consist of those who want limited invasion of website real estate, increased privacy, and more encryption.

"All that in place, I wouldn't even need an ad blocker."

"Definitely the encryption and noninvasive elements specifically would make me choose to disable the Ad Block Plus."

"I think it should be the standard for any ad or website. The shaking, the blinking, the audio playing, off."

"The encryption was the first thing that popped out to me, now we're talking security. We're talking prevention vs reaction so that hit home."

"Ad choice whether or not if they want to opt in or opt out it's not even something that I would be worried about because it's encrypted"

"Light would be the last one. I'm not so concerned about speed."

- LEAN Eliminates Desire To Block Ads: Once users hear about LEAN ads, Nonblockers would express few reasons to install an ad blocker, regardless of their propensity. They feel that their main frustrations with online advertising would be solved if the majority of websites they visit frequently held ads to LEAN standards.
- **LEAN Has Spectrum Of Impact On Blockers:** Among Blockers, there seems to be a spectrum of likelihood where most ad blockers would feel comfortable with disabling their blockers and a select few not considering unblocking at all.
- Primary Elements Non-Invasive & Encrypted: Highest ranked elements of LEAN amongst participants. Annoying/frustrating ad experiences and security/privacy are the two main concerns of ad blockers and highpropensity non-blockers.
- Secondary Elements AdChoice Supported & Light: Helpful elements, but are benefits that are less-likely to be recognized. Most consumers are not aware of the functionality of AdChoice, and express limited annoyance with loading times.
- Additional Suggestion Frequency Capping: An element not included in the LEAN model but mentioned by users is the necessity for standards limiting ad frequency per site. Redundancy is an annoyance that grows exponentially when combined with the most annoying ad formats like auto-play audio.

How to Win Back Current Ad Blockers and Prevent Future Ad Blocking



Give Users Control:

- Provide Video Skip Button After Viewing Some of the Video Ad
- Offer Ad *Ratings* Thumbs Up/Thumbs Down



Provide a Streamlined User Experience:



Don't Disrupt Their Flow

- No Ads That Block Content
- No Long Video Ads Before Short Video Content
- No Ads That Follow Down The Page
- No Autoplay
- No Slow Loading, Especially On Mobile
- No *Pop-Ups* or *Full Page* Ads



For Those Using an Ad Blocker:

- Disrupt Their Flow:
 - Politely Ask to Turn Off
 Ad Blocker
 - Block Content if Ad Blocker Not Turned Off



Assure Users of Site Safety: Especially important to prevent future blockers

- Provide Guarantees that Site is Secure
- Assure Users that Ads are Malware- and Virus-free
- Guarantee that Ads **Do Not Slow Down** Browsing

... In short, implement LEAN principles

... In short, implement DEAL

"This [LEAN] is great. If all sites had a guarantee, like a seal of approval, I wouldn't need to use an ad blocker"

Ad Blocking is two way street.



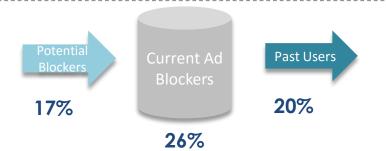
Certain Ad Elements and Formats Drive Ad Blocking Ads That Block Content

Long Video Ads Before Short Video

Ads That Follow Me Down the Page

Pop-Ups

Past Blockers & Current Blockers could be in equilibrium?



20% Stopped Blocking Ads. What Strategies Could Bring **Back the Rest?**

A mix of the following could be effective.

Block Content

Active Blocking: Required to whitelist

Passive Blocking: Asked, NOT required, to whitelist

Site Guarantees

No auto starts Won't block content Ads won't slow down browsing Ads safe from virus

LEAN

Ad Standards Consumer Control



Ad Ratings



Fast Forward



Notification Message

Ad Blocking: Who Blocks Ads, Why and How to Win Them Back

QUESTIONS?

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KRISTINA SRUOGINIS | IAB RESEARCH DIRECTOR | Kristina@IAB.com





APPENDIX

Relevance & Blending Can Improve Ad Experiences



Relevance To Consumer: Relevant ad experiences have a positive impact on consumers. Even relatively bothersome ad experiences are eased when combined with a message or a brand that is relevant to the consumer.

"I like the ads that are relevant to me...those ads were appealing to me."



Relevance To Site Content: Ads that are relevant to content can lead to positive experiences. Interest in content will similarly draw interest to related ads.

"If it's relevant it'll probably catch your eye more than if it's not relevant."



Ad Design/Creative Blends/Complements Page: Ads that blend to the background, or are the background of a page are received positively as they are often not viewed as ads.

"I think for a perfect ad you need a good visual and a good picture."

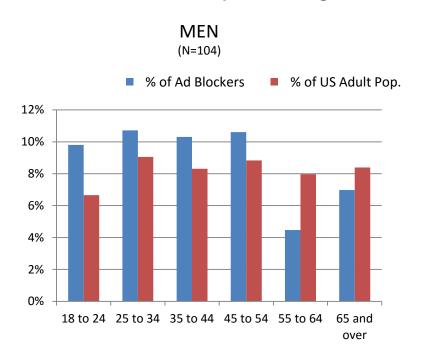


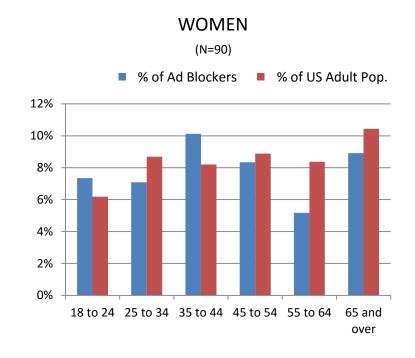
Aesthetically Pleasing And To The Side: Consumers enjoy seeing visually pleasing ads that can often add to the site experience. Ads off to the side or in the background are more likely to invite the user to view the ad as opposed to force the user.

"I think the side of the page is obviously less distracting."

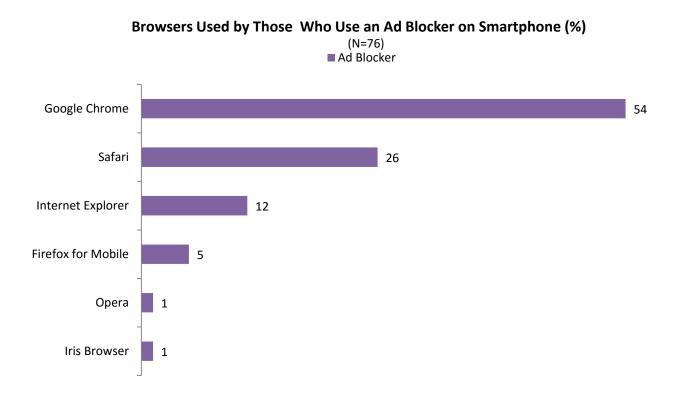
Smartphone Ad Blockers Also Skew Younger and Male

Population Weighted % of Ad Blockers by Gender and Age





5] Among Smartphone Blockers, Half Surveyed Use Chrome



^{*}Small base size. Use directionally.

Computer

Billboard ads that are large interactive ads that appear at top of web pages

Pop-up ads that appear in front of content and have a close button to continue to content

In Page Video ads that play in an ad outside of a video player

Full Page ads that appear before moving to a page, generally with a button to continue to content

In Stream Video ads that play in a video player before video content begins

Video Overlay ads that are static ads that appear on top of a video at the bottom of the player

Traditional box shaped ads that appear on the side of a page

Background ads that are large static ads that wrap around the content/background of a web page.

Recommendation articles that appear as recommended content that link to an external website. ads are typically labeled with "Sponsored Links" in the corner.

Sponsored Articles are content on a website sponsored by a 3rd party company, but keep user within the website when clicked on.

Smartphone

Banner ads that appear at the top or bottom of web pages in your browser

Pop-up ads that appear in front of content and have a close button to continue to content

In Page Video ads that play in an ad outside of a video player

Full Page ads that appear before moving to a page, generally with a button to continue to content

In Stream Video ads that play in a video player before video content begins

Traditional box shaped ads that appear in the middle of the page

Sticky Banner ads that follow you on the top or bottom of the browser as you scroll down a page