

Online Consumers Views and Usage of Ad Blocking Technologies

IAB – Ad Blocking Study

September 2014



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Objectives and Methodology

Objectives

- Estimate the incidence of ad blocking among the US adult population of Internet users
- Understand consumer motivations for blocking ads
- Determine if consumers unblock ads and the key drivers for unblocking

Methodology

- Quantitative research was conducted among Adults 18+ using Vision Critical's Springboard America online panel (fielded Sep 4-11, 2014).
- The sample used from Vision Critical's Springboard America (SBA) online panel was designed to be representative to the US census/online population. Sample size for this research N=617

Summary

- 34% of US adults 18+ use ad blockers
 - Current users are more likely to be younger males who are “very comfortable” with computers and have children under 18 in the HH
 - On the other hand, non-users tend to be older female empty nesters who are “fairly/not very comfortable” with computers
 - 60% of current users would turn off ad blocking for content
- Key factors consumers started using Ad Blocking: Learned about the existence of ad blocking tech and their computer became infected with a virus
- Key factors consumers continue to use Ad Blocking: To protect devices against viruses, increase computer performance, a general dislike of advertising and distracting ads
- Key factors consumers will turn OFF Ad Blocking: An inability to view online content unless the feature is disabled followed by the site looks trustworthy and to get the ad experience
- The types of ads that are most likely to drive consumers to use ad blockers are video ads that automatically start playing on a page, large ads that temporarily take over a screen and blinking ads

Implications

- One-third of Americans claim to currently block ads and about 1 in 4 of them started in the past year.
- The top motivations for beginning to use ad blocking are discovering ad blockers exist and having gotten a virus from clicking on an ad. Getting a virus from an ad underlines the need for publishers to work to prevent bad actors in the advertising ecosystem.
- Top reason to continue using ad blockers are dislike of ads, improved computer security and improved user experience.
- Paying attention to Privacy, Ad Fraud and Ad Experience should be key for any publisher to improve rates of ad exposure and discourage ad blocking.
- Ad blocking users also respond to notices that block content in exchange for viewing content. Publishers should use these tactics in working around ad blocking.

Detailed Findings

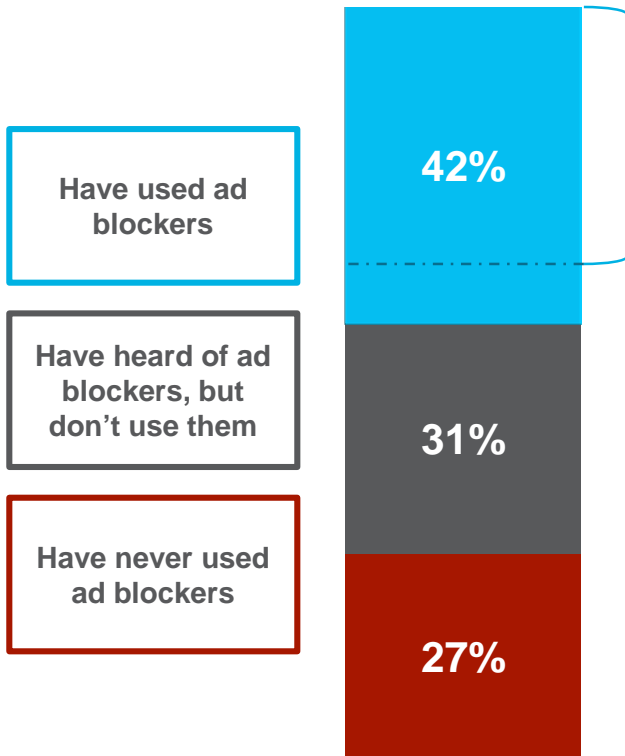


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One third of US adults currently use ad blocking

- Ad blocking users skew **Younger** and **Male**

Ad Blocker Awareness/Usage

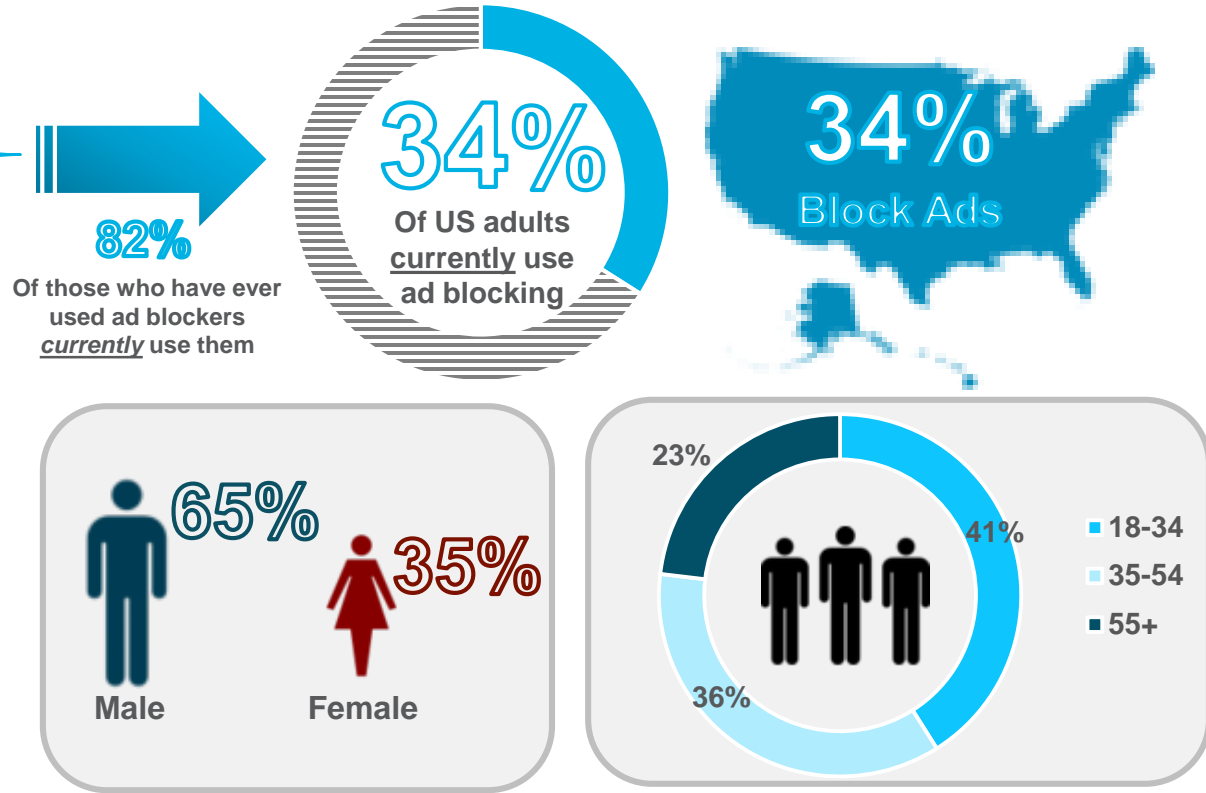


Have used ad blockers

Have heard of ad blockers, but don't use them

Have never used ad blockers

Currently Use Ad Blocking



Q: Thinking about when you browse online, have you heard about or used ad blocking technologies or applications, which allow users to block online ads?
 Base: Adults 18+ (N=617)

Q: Do you currently use an ad blocking technology or application?
 Base: Adults 18+ who have used ad blocking technology (N=260)

Current Users / Non-users Comparison

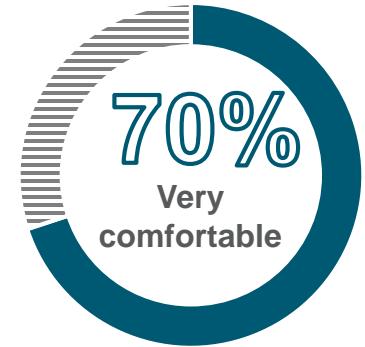
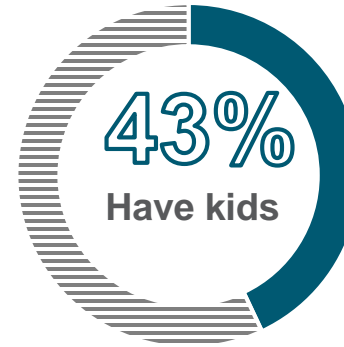
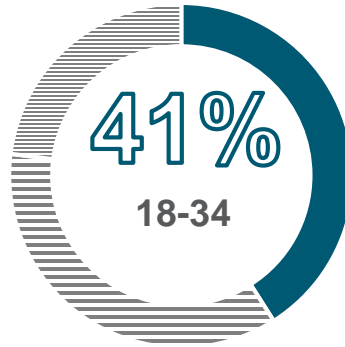
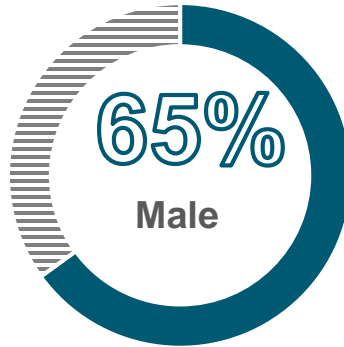

Gender


Age

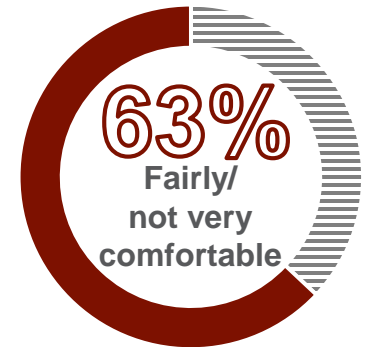
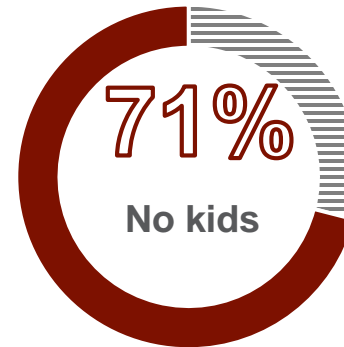
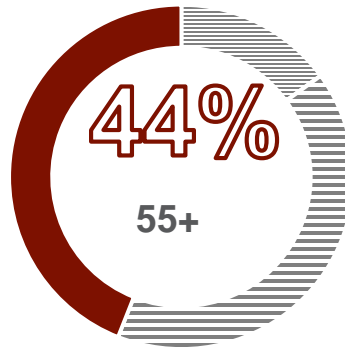
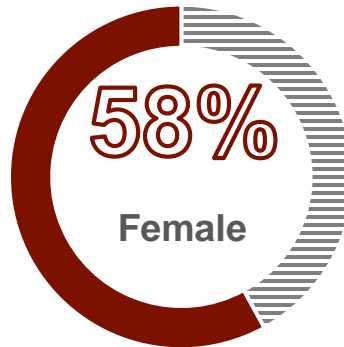

Children in HH


Computer Comfort Level

**Current
Users**



Non-users

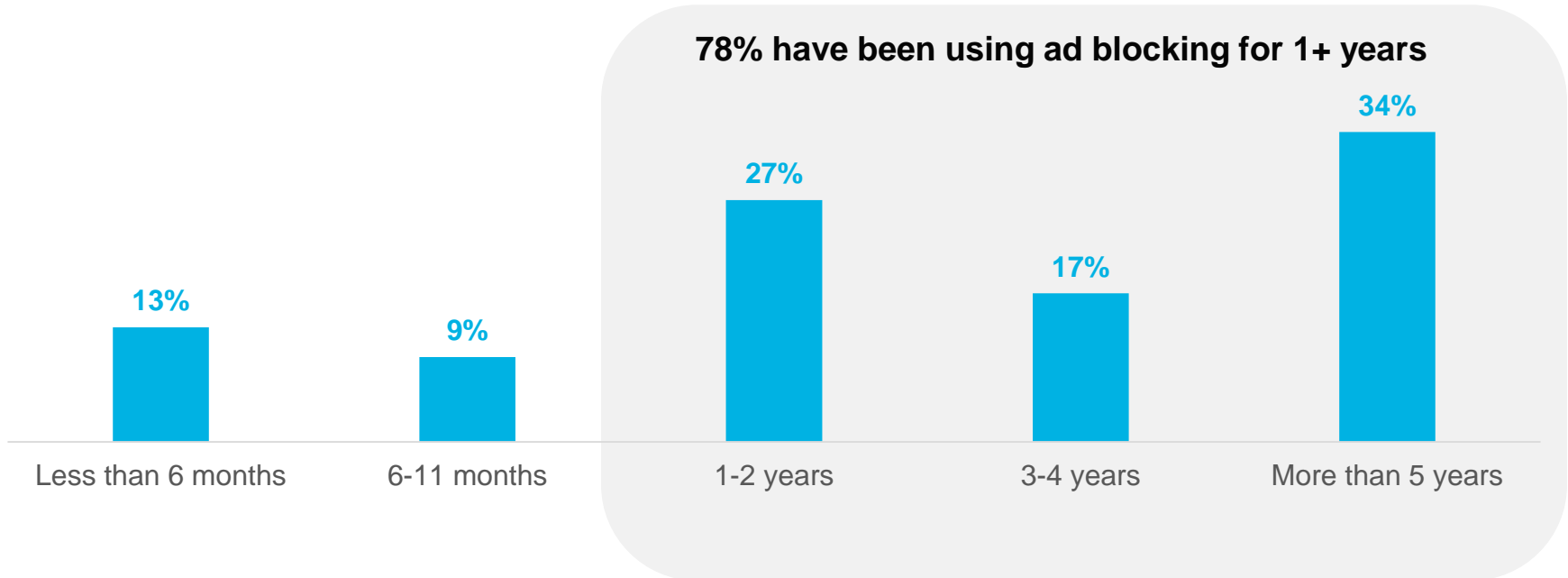


Current Users Base: Adults 18+ who currently use ad blocking technology (N=212)
Non-Users Base: Adults 18+ who have not used or heard about ad blocking technology (N=357)

51% have been using ad blocking for 3+ years



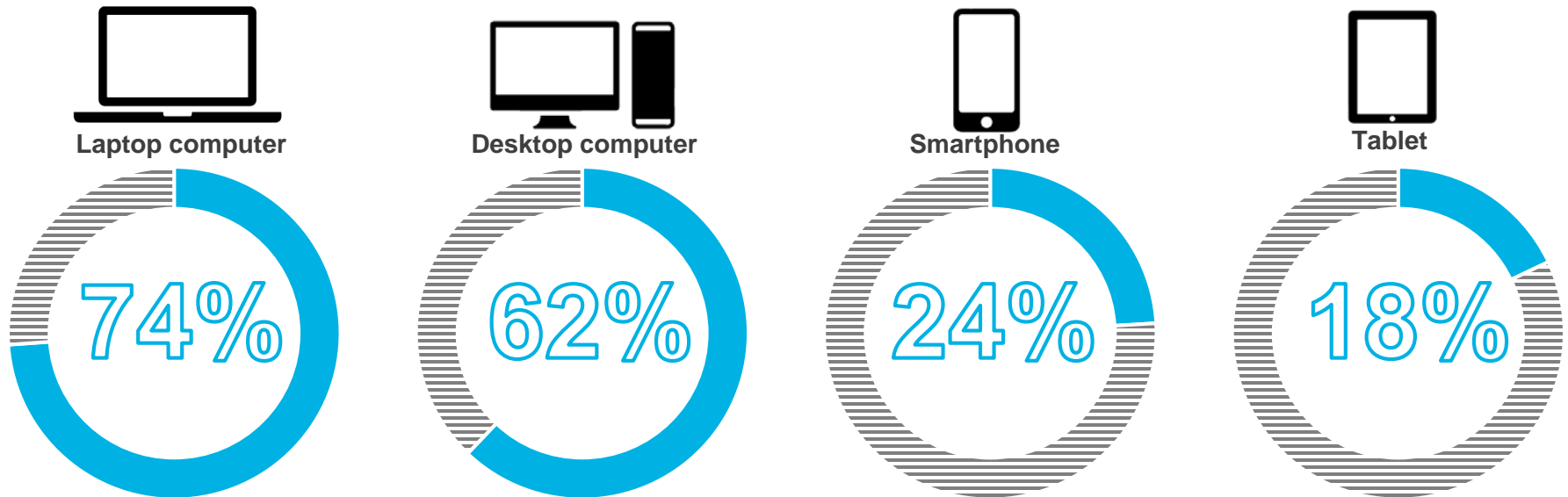
Length of Time Using Ad Blockers



Q: How long have you been using ad blocking technologies or applications?
Base: Adults 18+ who currently use ad blocking technology (N=212)

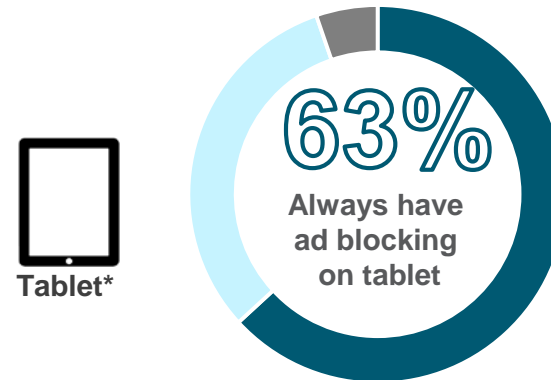
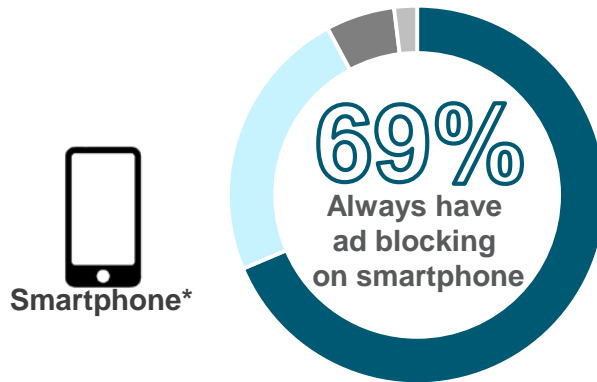
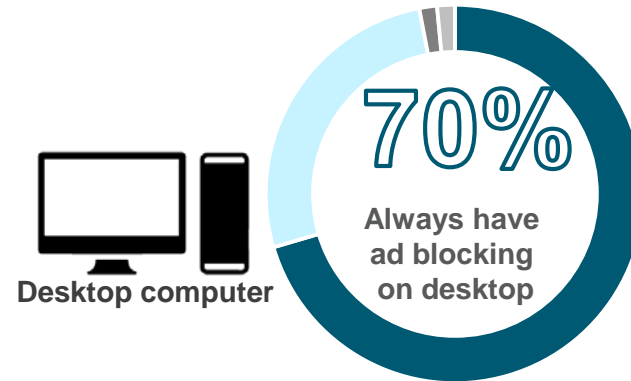
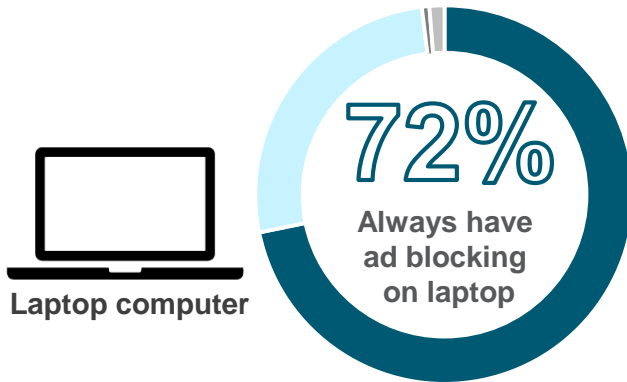
Ad blocking is most likely to be installed on a computer

Devices Installed with Ad Blocking



Q: On which devices do you currently use ad blocking technologies or applications?
Base: Adults 18+ who currently use ad blocking technology (N=212)

The overwhelming majority always have ad blocking turned on



■ It's always on
 ■ It's usually on
 ■ It's usually off
 ■ It's always off

Q: How frequently do you use ad blocking technologies or applications when using the following devices?

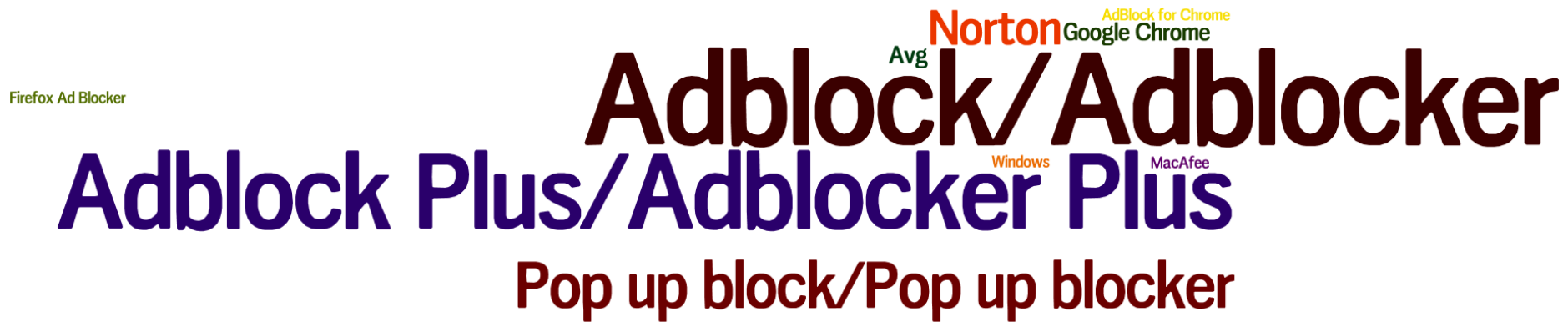
Base: Adults 18+ who currently use ad blocking technology on device
 Laptop (N=156); Desktop (N=132); Smartphone (N=51); Tablet (N=38)

*Base size < N=100

Adblock/Plus is the most used technology/app

- About 4% of respondents mentioned pop-up blockers

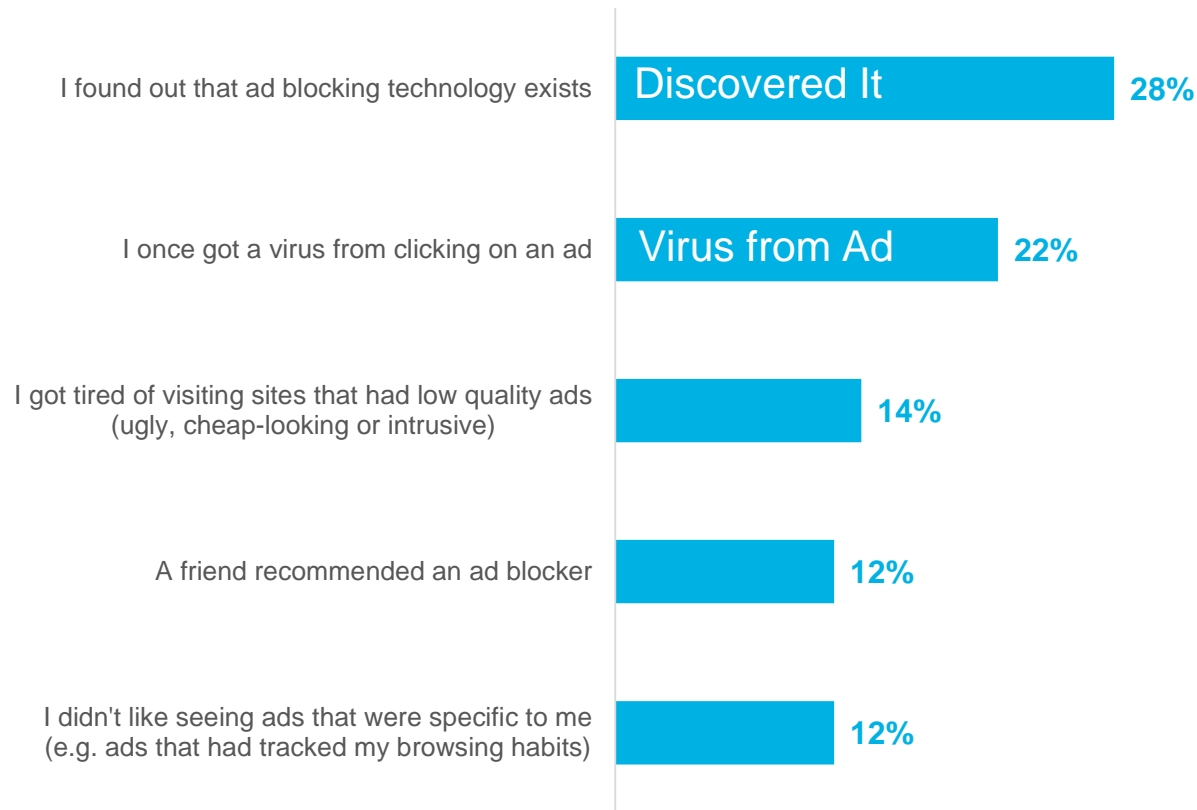
Ad Blocking Technology Used Most Often



Q: Which ad blocking technology or application are you currently using?
Base: Adults 18+ who currently use ad blocking technology (N=212)

Learning about the existence of ad blocking tech and being infected with a computer virus are the main triggers for using ad blocking

Why Started Using Ad Blocking

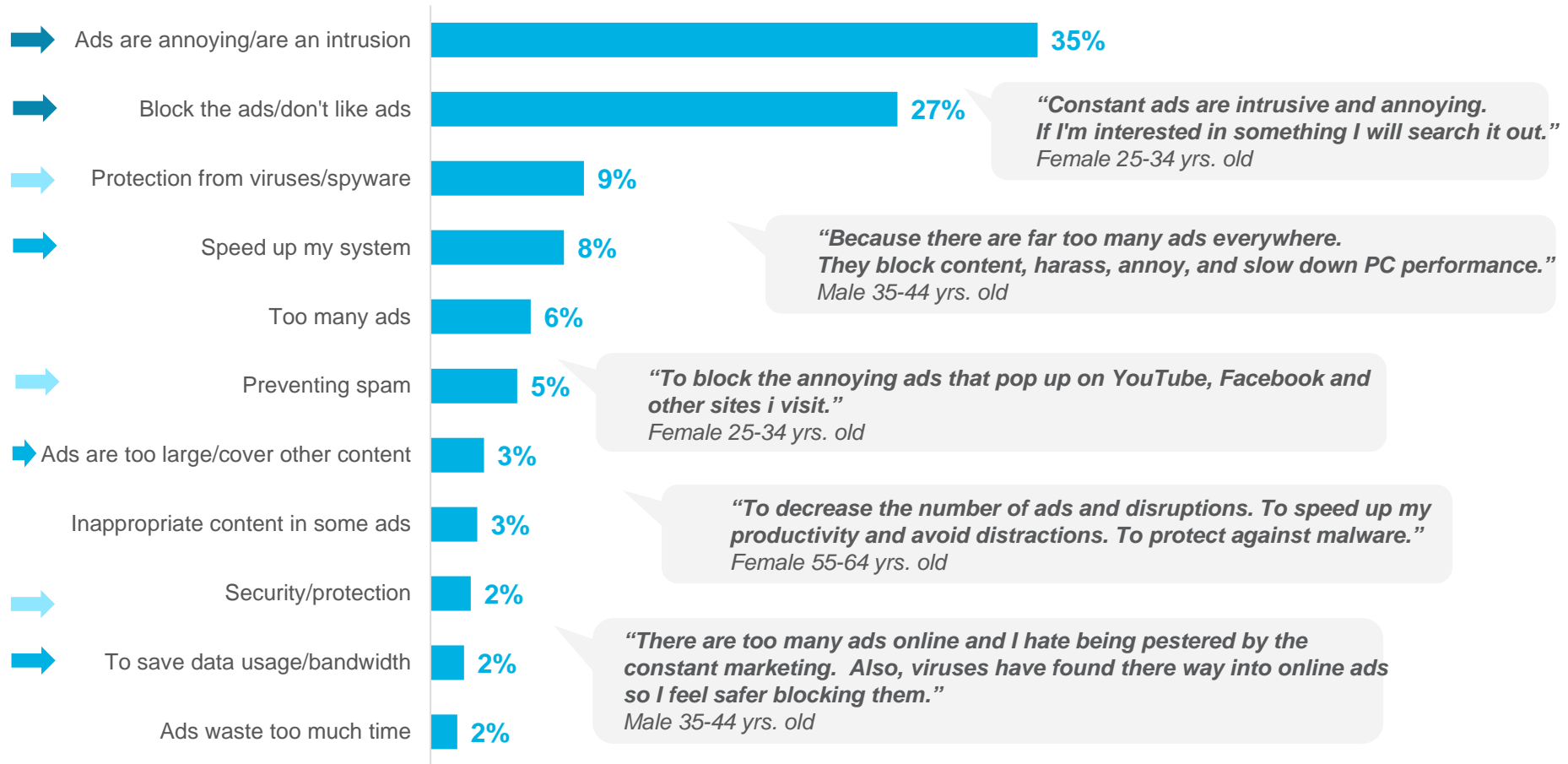


Q: Which best describes why you started using ad blocking technology?
Base: Adults 18+ who have used ad blocking technology (N=260)

For many, intrusive and annoying ads, as well as a general disdain of advertising are the main drivers for using ad blocking

- Key themes for using ad blockers: Dislike Ads, Security, User experience

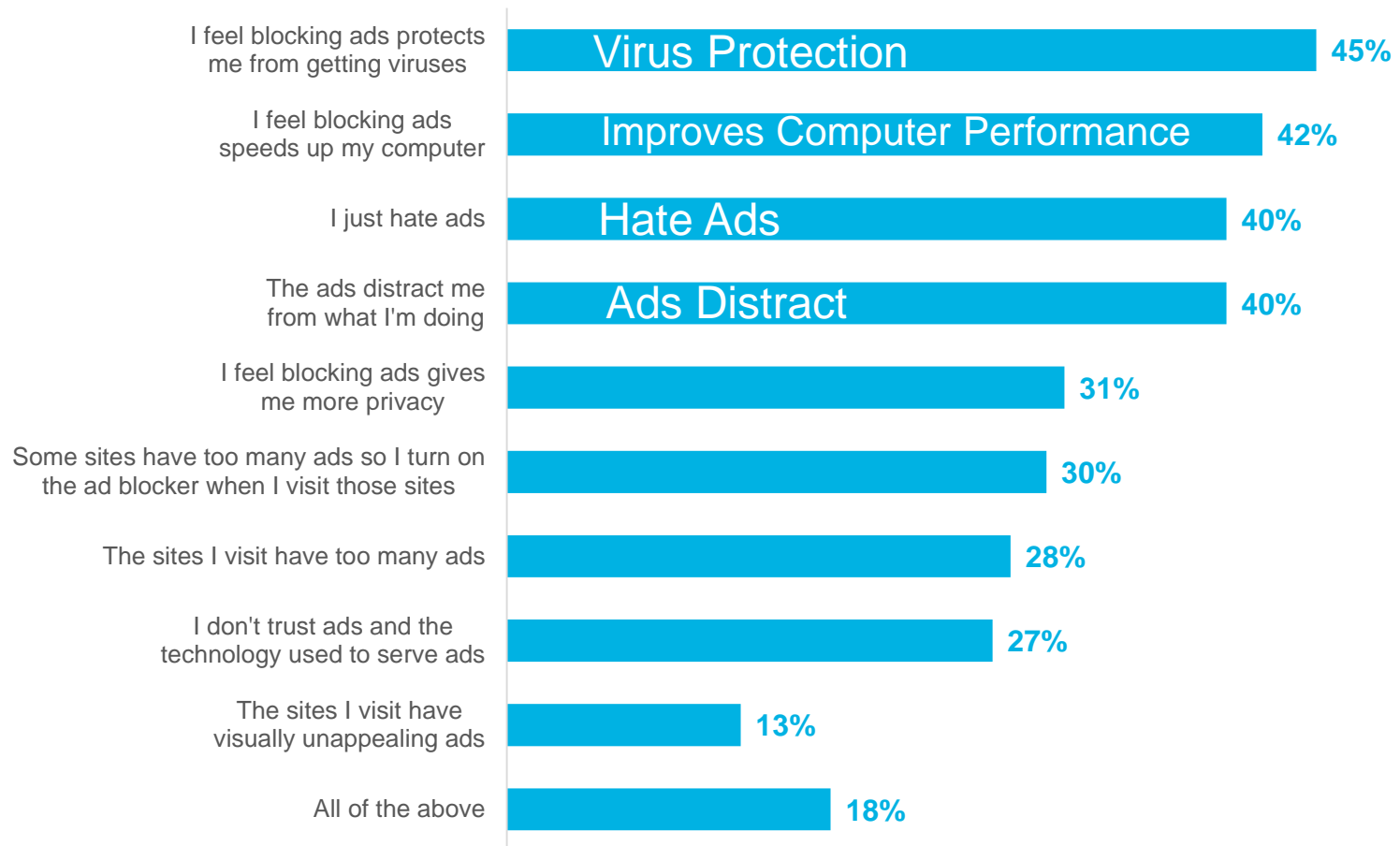
Why Use Ad Blocking (Unaided)



Q: Why do you use ad blocking technologies or applications?
Base: Adults 18+ who have used ad blocking technology (N=260)

Protection against viruses, increasing computer performance, dislike of advertising and distracting ads are cited most often as the causes for using ad blocking

Why Use Ad Blocking (Aided)

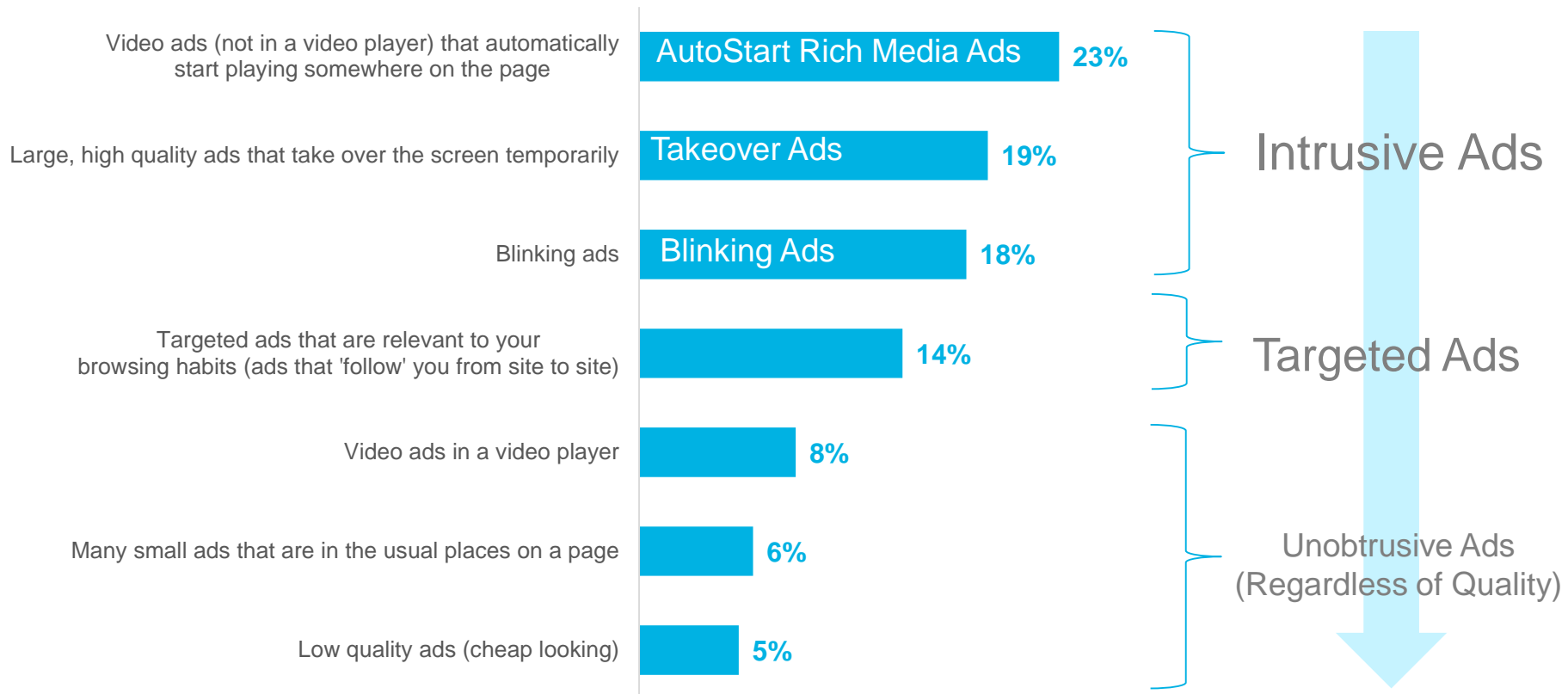


Q: Which of the following describes why you use ad blocking technologies or applications?
Base: Adults 18+ who have used ad blocking technology (N=260)

The types of ads that are most likely to spur ad blocking usage are video ads that automatically start playing on a page, large ads that temporarily take over a screen and blinking ads

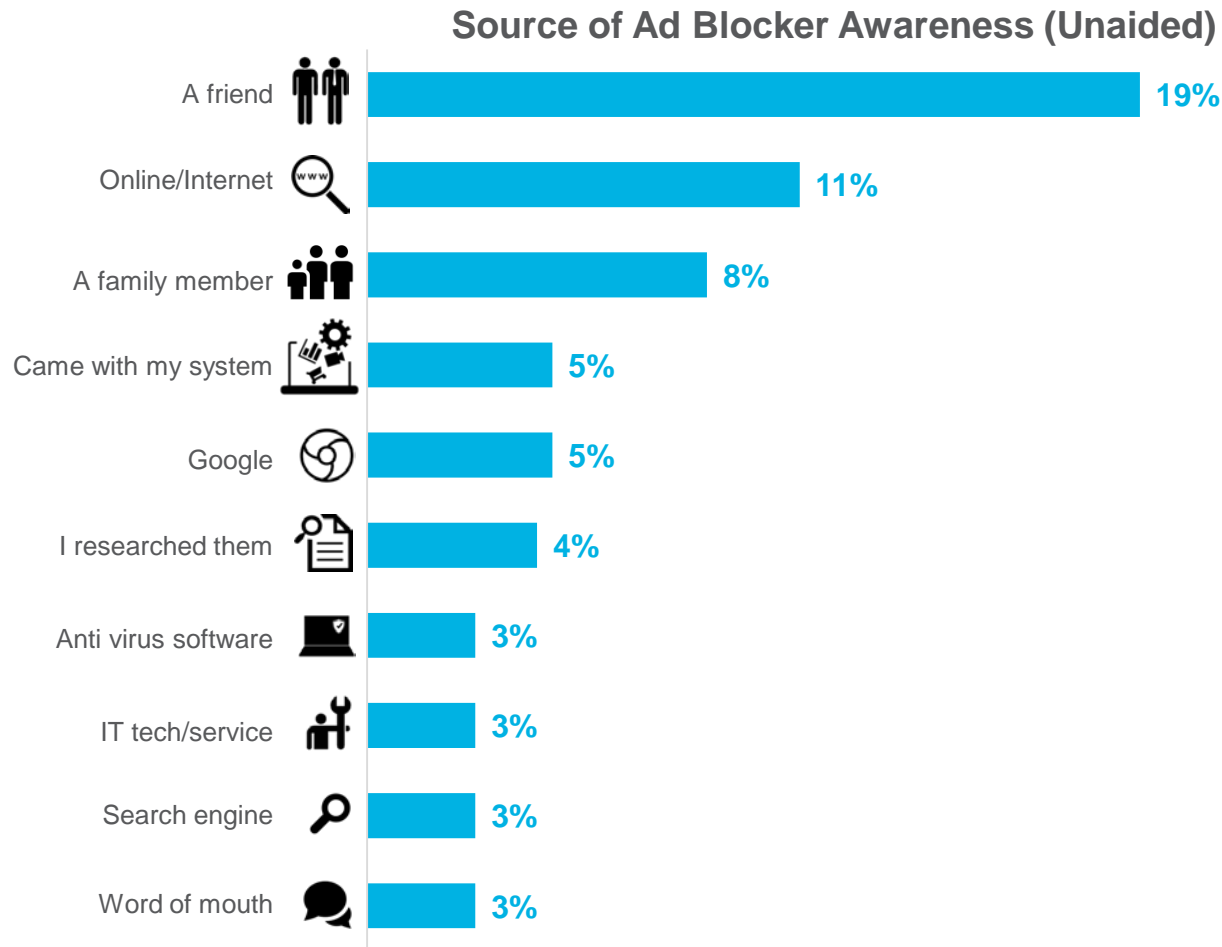
- Intrusive ads are most likely to prompt blocking ads

Type of Ad that Motivates Ad Blocking Usage



Q: There are many different types of ads online. Which of the following features of ads motivates you most to use an ad blocker?
Base: Adults 18+ who have used ad blocking technology (N=260)

Friends and family as well as the Internet are how many find out about ad blocking



Q: How did you find out about ad blockers?

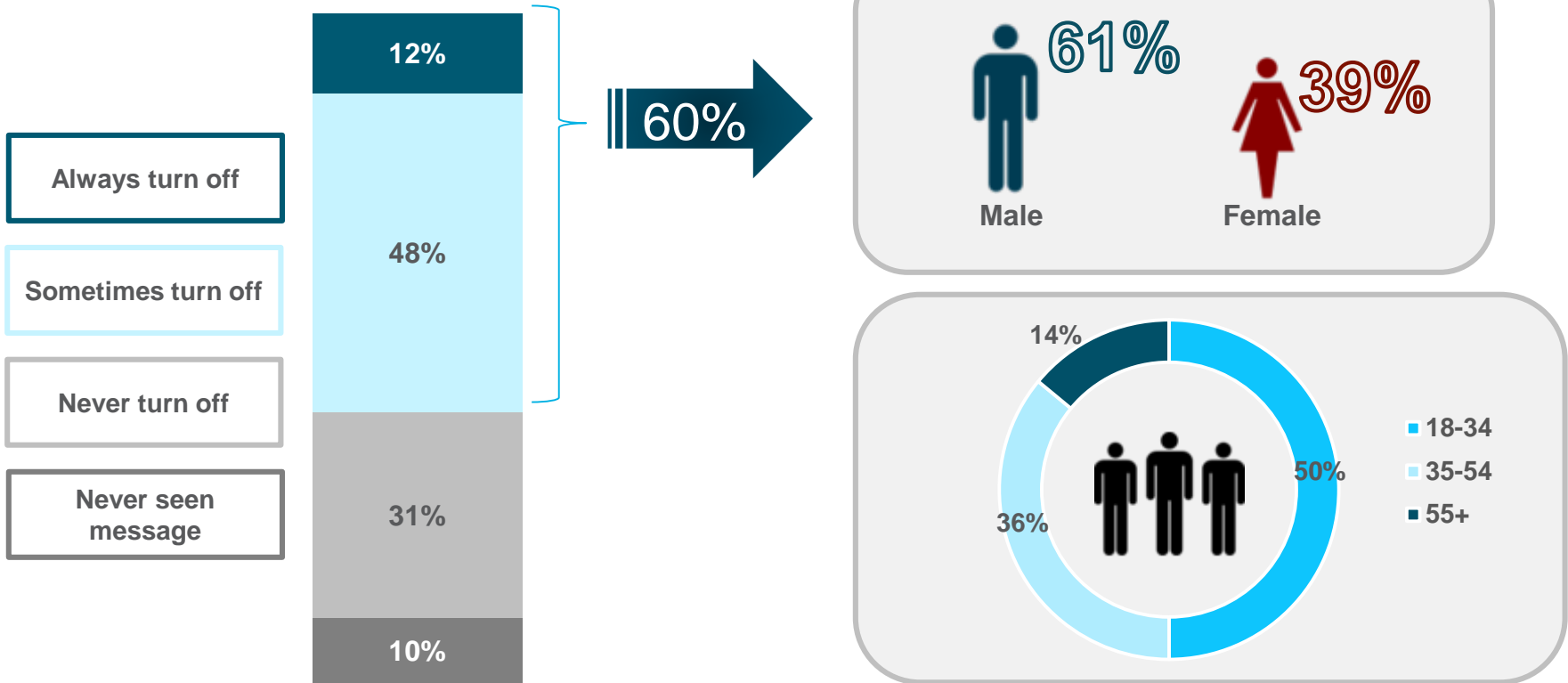
Base: Adults 18+ who have used ad blocking technology (N=260)

*Responses 3%+ shown

60% turn off ad blocking when requested by a website

- **Younger (18-34) Males** are more likely to turn off ad blocking for content

When Requested to Turn Off Ad Blocking

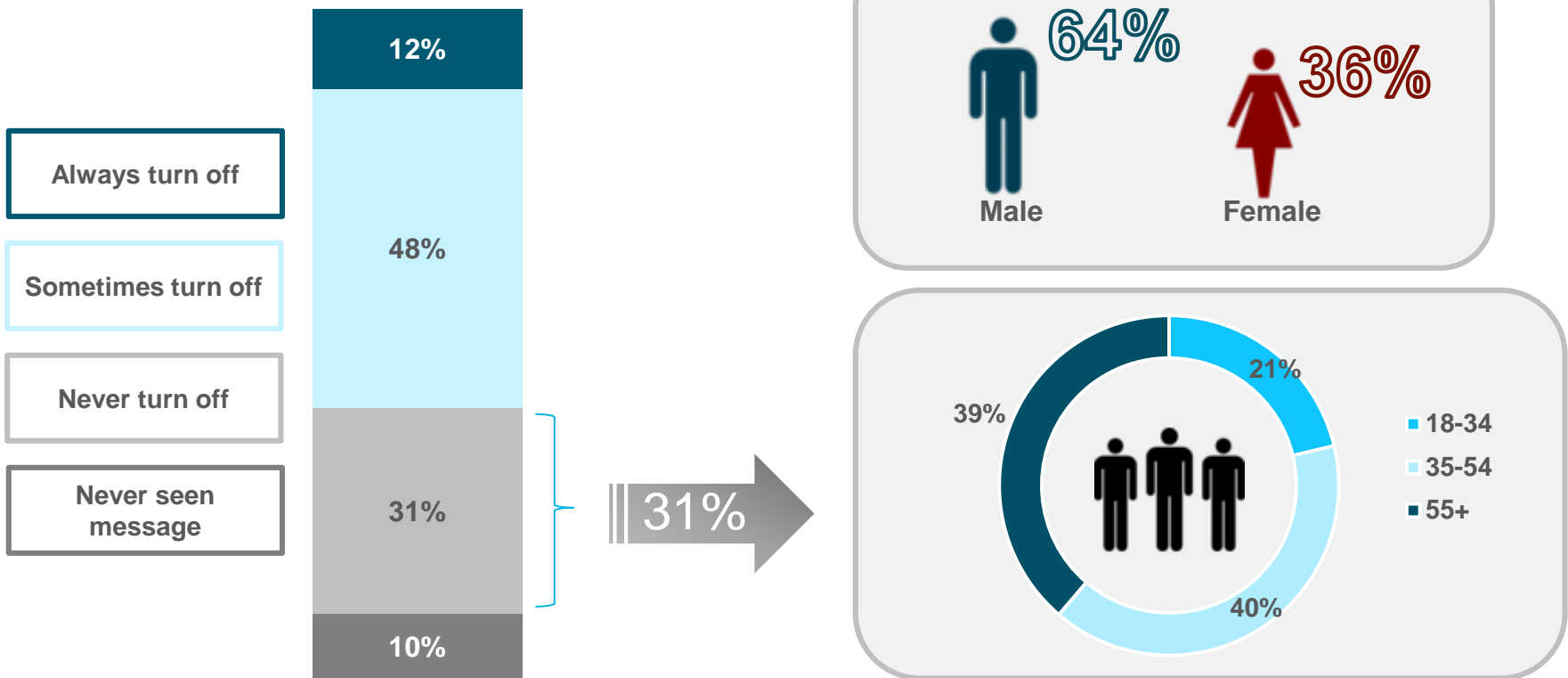


Q: How do you respond to a situation where a message appears on a website that you are trying to visit and asks you to turn off your ad blocker in order to view the content?
Base: Adults 18+ who have used ad blocking technology (N=260)

31% never turn off ad blocking when requested by a website

- Older (35+) Males more likely to not turn off ad blocking for content

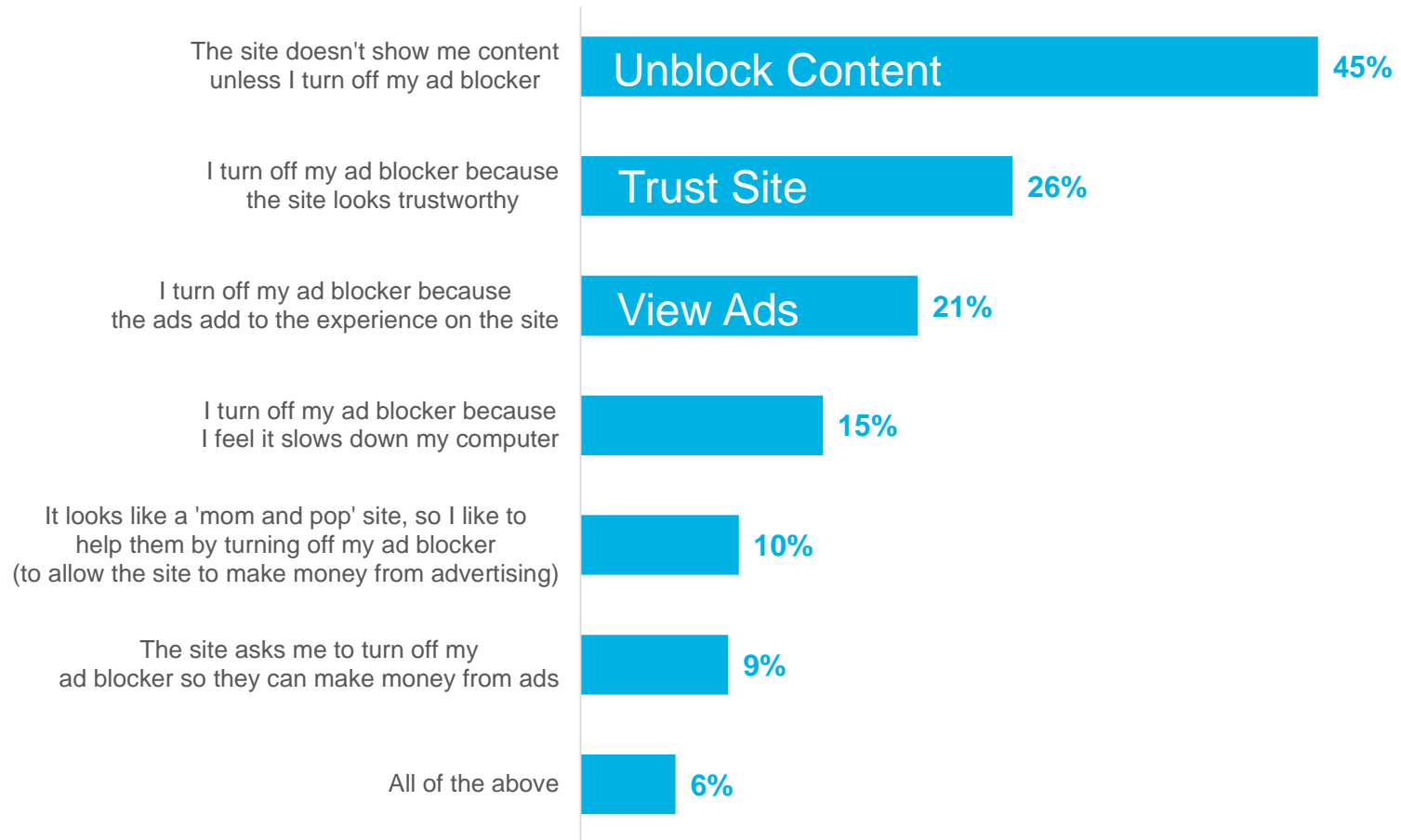
When Requested to Turn Off Ad Blocking



Q: How do you respond to a situation where a message appears on a website that you are trying to visit and asks you to turn off your ad blocker in order to view the content?
Base: Adults 18+ who have used ad blocking technology (N=260)

For most, turning off ad blocking is driven by an inability to view online content unless the feature is disabled

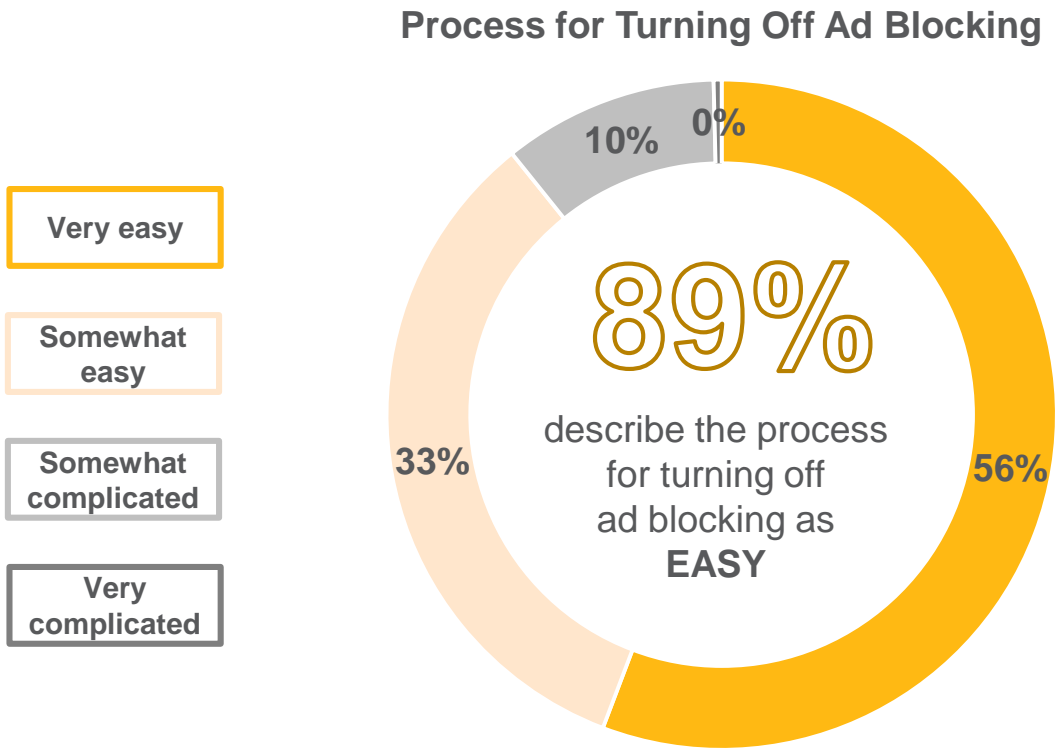
Reasons for Turning Off Ad Blocking



Q: In which of the following scenarios have you turned off ad blocking?

Base: Adults 18+ who have used ad blocking technology and have always/sometimes turned it off (N=155)

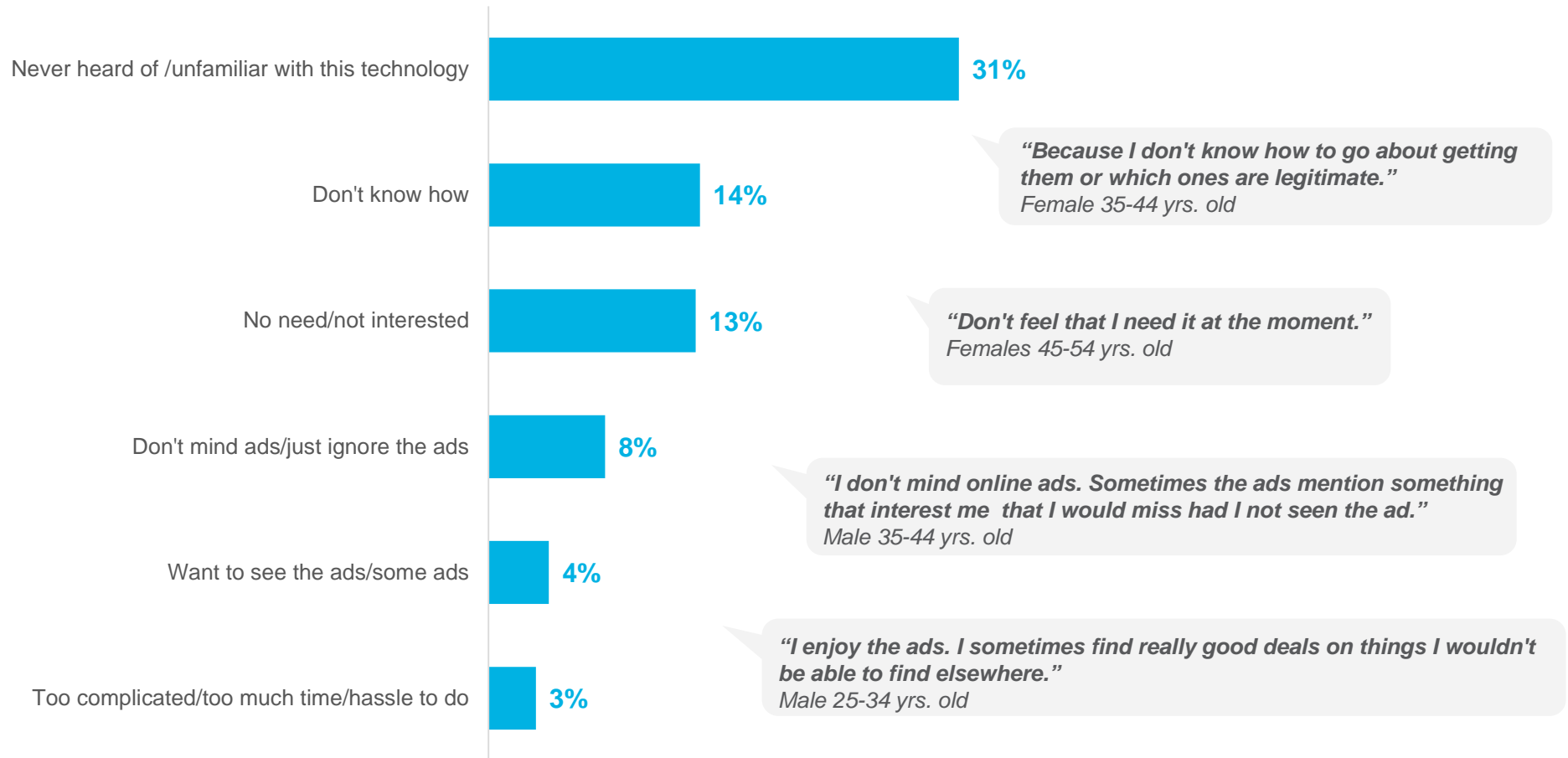
9 out of 10 state the process for turning off ad blocking is easy



Q: How would you describe the process for turning off ad blocking? Would you say it is...?
Base: Adults 18+ who have used ad blocking technology (N=260)

Most non-users are currently not using ad blocking because they are unaware/unfamiliar with the technology

Why Don't Use Ad Blocking (Unaided)



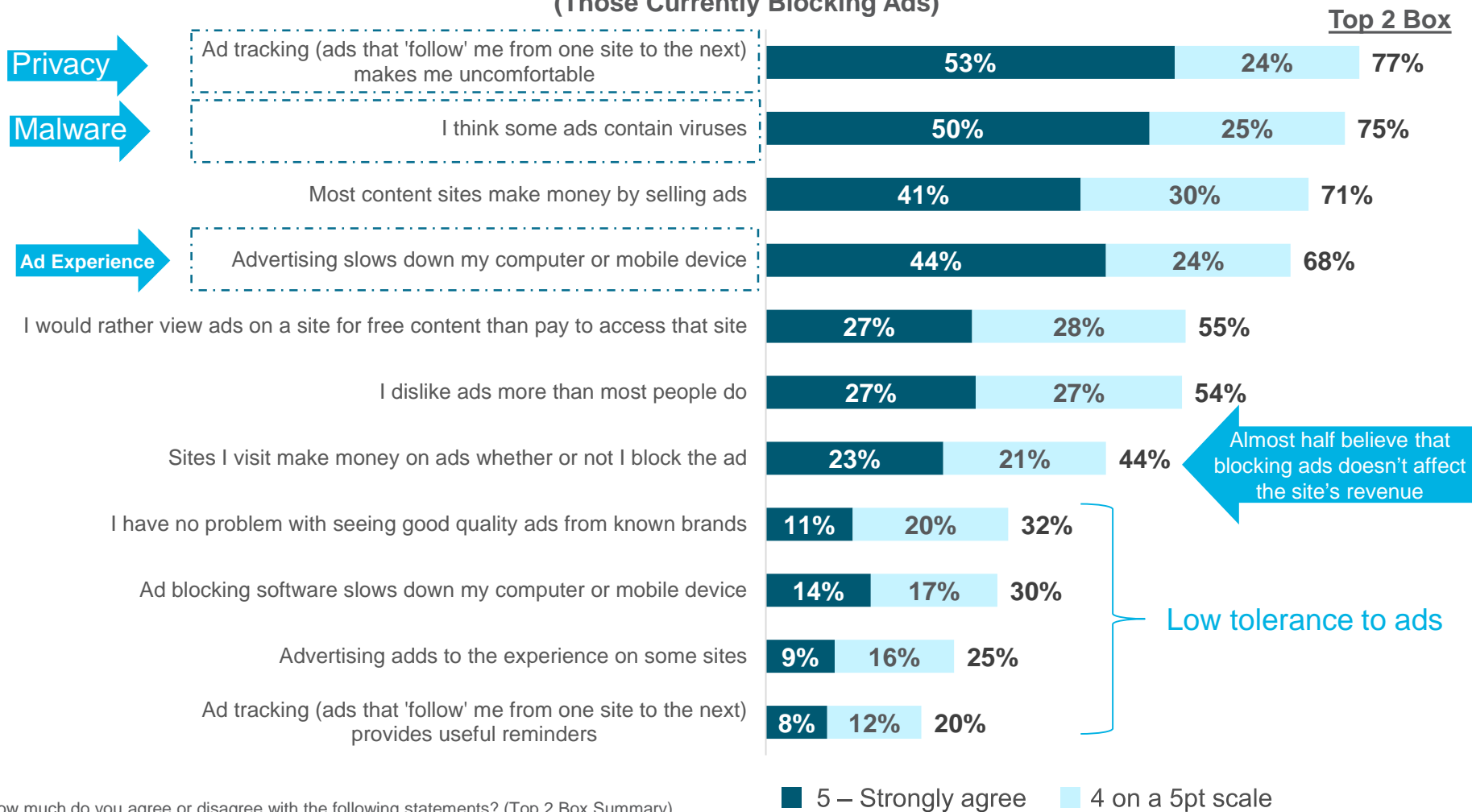
Q: Why don't you use ad blocking technologies or applications?

Base: Adults 18+ who have not used or heard about ad blocking technology (N=357)

*Responses 3%+ shown

Current ad blocking users are highly uncomfortable with ad tracking and strongly believe ads both contain viruses and slow down their devices. They also have a strong antipathy towards advertising

Agreement Statements (Those Currently Blocking Ads)

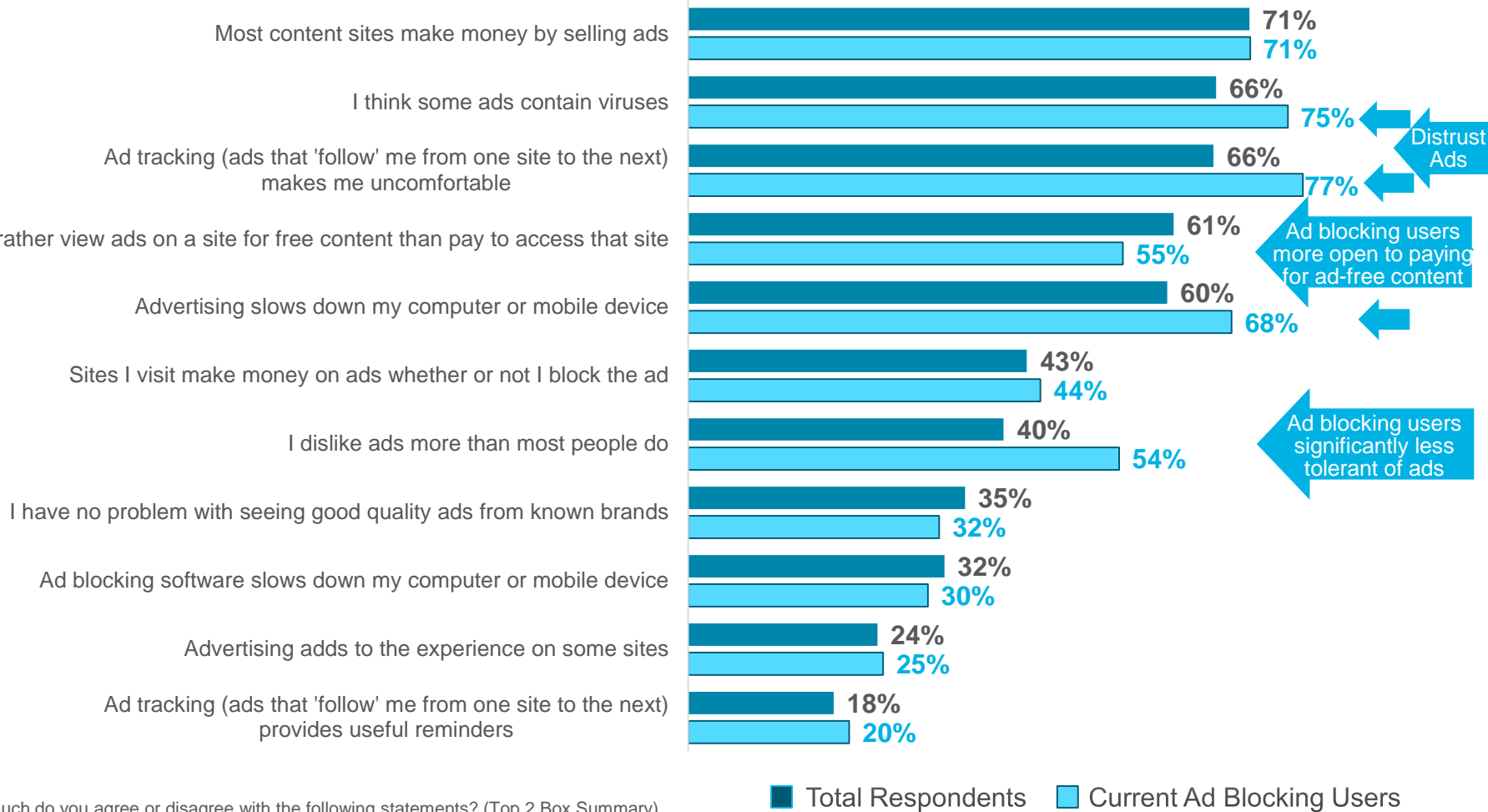


Q: How much do you agree or disagree with the following statements? (Top 2 Box Summary)
Base: Adults 18+ who currently use ad blocking technology (N=212)

Current ad blocking users are more likely than the general online population to indicate they are uncomfortable with ad tracking, ads contain viruses and slow down their devices. They are also more likely to have a strong antipathy towards advertising and to prefer paying for content

Agreement Statements

Top 2 Box (4/5 –on 5pt scale)



■ Total Respondents ■ Current Ad Blocking Users

Q: How much do you agree or disagree with the following statements? (Top 2 Box Summary)
 Base: Adults 18+ (N=617); Adults 18+ who currently use ad blocking technology (N=212)

Questions?

IAB Ad Blocking Study – September 2014

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