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Executive Summary
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.
Executive Summary
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.**
Executive Summary
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
      • **In short, implement LEAN principles** (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)
Strategic Objectives

Who is Blocking Ads?
Which Ad Formats and Ad Elements are most annoying?
What is different between Ad Blockers & Non Blockers?
How do we fight Ad Blocking?
Eye Tracker Lab Study

2 Hour Sessions
- Browse 3 Sites (H, M, L)
- Replay Session
- Rate 3 Ads/Site
- Rate each Site
- Ad Blocking Survey
- Qualitative Interview

103 Consumers
Adults 18 and older
- Ad Blockers
- Vulnerable
- Non Blockers

36 Websites Viewed
- High Ad Load
- Medium Ad Load
- Low Ad Load

Survey

<table>
<thead>
<tr>
<th>DESKTOP/LAPTOP</th>
<th>N=1292</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL AD RATINGS</td>
<td>n=2584</td>
</tr>
<tr>
<td>NO OF SITES RATED</td>
<td>n=36</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MOBILE</th>
<th>N=201</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL AD RATINGS</td>
<td>n=402</td>
</tr>
</tbody>
</table>

Sample of Adults 18 and older included oversample of males 18-34 to better understand the target demographic for ad blocking.
Website Categorization

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

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
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.

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Entertainment</th>
<th>Information</th>
<th>Mixed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>News</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Science &amp; Technology</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Health &amp; Fitness</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Lifestyle, Pop-Culture &amp; Blogging</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Style, Fashion and Beauty</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Home Improvement</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Outdoor Living</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Game/Gaming</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Cars/Automobiles</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>

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

1. Respondents browsed 3 sites, varying on Perceived Ad Load:
   - High Load
   - Medium Load
   - Low Load
   And varying on Content Type:
   - Entertainment
   - 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
  - Behavior
  - Ad Attitude
  - Ad Engagement
  - Ad Persuasion
  - Ad Appeal
  - Ad Reactance

### SITE RATINGS

**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 Block
- Knowledge 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 Formats
  - Detailed feedback on the three sites
- Concept Feedback (Concepts were continuously developed and modified as new ideas came to light)
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
- 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
- Attribution of load time on Smartphones.

**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

**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
- Attribution of load time on Smartphones.

**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

**Mobile Ad Blocking (N=201)**

A part of the sample (N=201) was directed to a Mobile survey. Mobile Ad Blockers and Non Blockers (with a likelihood to install an ad blocker) were directed to the mobile survey.
WHO BLOCKS ADS & WHY?
Ad Blockers & Non Blockers on Computers

Total Respondents

- Ad Blockers (N=330) 26%
- Continued Non Blockers (N=478) 17%
- Past Users (N=260) 26%
- Potential Blockers (N=224) 37%

74% Non Blockers

Ad Blocker – Confirmed current user of ad blocker on computer
Past User – Used an ad blocker in the past 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 6 months

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 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.

**Users of Ad Blockers Were Reconfirmed:**

1. Do you currently use an ad blocker?
2. How long have you been using an ad blocker?
3. Do you usually see ads when you are online?
4. What’s the name of the ad blocker you use?
5. Pick from this list the ad blocker that you currently use.
6. An ad blocker is...

---

**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

**MEN**

- % of Ad Blockers
- % of US Adult Pop.

**WOMEN**

- % of Ad Blockers
- % of US Adult Pop.
I feel that I am always in a hurry when I am online
I got a virus in the past and am now more cautious when I am online
I am easily distracted online
I am more annoyed than most people by online ads
I prefer streamlined websites where I can get to what I want quickly
I feel that even the best antivirus software can overlook some threats
I find messages asking me to subscribe or like a site to be distracting
When I am browsing online, I am concerned about getting a virus
I only visit sites that I know and trust
When I am browsing online, I want as few interruptions as possible

<table>
<thead>
<tr>
<th>Security Concerns</th>
<th>Ad Blocker</th>
<th>Non Blocker</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am more annoyed than most people by online ads</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>I am easily distracted online</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>I got a virus in the past and am now more cautious when I am online</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>I feel that I am always in a hurry when I am online</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

(N=330) (N=962)
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?

- The ads are taking too long to load and slowing down the page
- Too many ads on the website
- The content is taking too long to load and slowing down the page
- The ads are too heavy (large file sizes)
- Content on site is too heavy (large file sizes)
- Too much content on the website
- A slow website in general
- Internet speed/WiFi connection
- Web browser speed
- Too many browser windows open
- Too many people visiting the site at the same time
- Computer speed/performance

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?

"Mostly, I would almost think bad connection but it might almost be too much content trying to be loaded"

"I think that's because I have too much on my computer. I don't know if that's from the actual website"
SMARTPHONE USERS OF AD BLOCKERS
PILOT STUDY WITH 200 USERS
A majority of smartphone users are aware of Ad Blockers but have never used them.

**Smartphone Users**

- **Aware but Never Used Ad Blockers**: 67% (N=843)
- **Not Aware of Ad Blockers**: 18% (N=226)
- **Ad Blockers**: 15% (N=194)

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

Please tell us the reasons why you use an ad blocker

On Computer

(N=330)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Strongly Agree</th>
<th>Neutral</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sites are Easier to Navigate without Ads</td>
<td>4</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Don’t like Ads that Target or Follow me</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Sites are Visually Pleasing without Ads</td>
<td>4</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Ads are Disruptive</td>
<td>4</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Ads slow down Browsing Experience</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Ads slow down Page Load Times</td>
<td>4</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Just too many Ads on Sites</td>
<td>4</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Ads Distract from Browsing Experience</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>More Privacy on Internet</td>
<td>4</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Afraid of getting Virus</td>
<td>4</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Don’t Trust Technology to Serve Ads</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Everyone I know uses Ad Blockers</td>
<td>4</td>
<td>3</td>
<td>5</td>
</tr>
</tbody>
</table>

Please tell us the reasons why you use an ad blocker

On Smartphone

(N=76)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Strongly Agree</th>
<th>Neutral</th>
<th>Strongly Agree</th>
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<tr>
<td>Ads slow down Browsing Experience</td>
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<td>4</td>
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<tr>
<td>Sites are Easier to Navigate without Ads</td>
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<td>3</td>
<td>4</td>
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<tr>
<td>Sites are Visually Pleasing without Ads</td>
<td>4</td>
<td>3</td>
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<td>Ads Distract from Browsing Experience</td>
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<tr>
<td>Afraid of getting Virus</td>
<td>4</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Everyone I know uses Ad Blockers</td>
<td>4</td>
<td>3</td>
<td>5</td>
</tr>
</tbody>
</table>

Note: Small base size for Smartphone users of ad blockers. Use directionally.
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.

“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.”

LAB DATA
N=103 Ad Blockers and Non Blockers participated.
924 Live Ads were reviewed.
Sites Are Generally NOT Hated For Ads

<table>
<thead>
<tr>
<th>Perception</th>
<th>Ad Blocker (N=330)</th>
<th>Non Blocker (N=962)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I enjoyed the ads on the site</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Usually on a site like this, it is easy for me to ignore ads</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The site has too many ads</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I feel the ads on the site slowed down the site</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The site has annoying ads</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The ads on the site interrupted the content a few times</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The site has deceptive ads</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am unlikely to visit the site again due to the ads on the site</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Strongly Agree = 5

Neutral = 3

Strongly Disagree = 1
However, High Ad Density Sites Result In Inferior Ad Ratings

Ad Density of Sites

Strongly Agree = 5
Strongly Disagree = 1

Worse Ad Ratings
Neutral
Better Ad Ratings

I enjoyed the ads on the site
Usually on a site like this, it is easy for me to ignore ads
The site has too many ads
The site has annoying ads
I feel the ads on the site slowed down the site
The ads on the site interrupted the content a few times
I am unlikely to visit the site again due to the ads on the site
The site has deceptive ads

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

How much or how little do these ad characteristics annoy you?

**ALL Respondents**

(N=1292)

- Ads that shake
- Ads with blinking/flashing colors
- Big ad size
- Ads with moving elements
- Ads with bold colors
- Ads that follow me down the page as I scroll
- Ads that make the page content move
- Ads in middle of content
- Ads that expand if you scroll over them
- Ads that are closer to the content than usual
- Ads outside an audio player that play audio automatically
- Ads outside a video player that play video automatically
- Ads in a video player that play video automatically before the video
- Ads that block the content
- Long video ads before a short video
- Video ads that don’t have a skip button
- Ads that load slowly
- Ads that load before content loads
- Ads related to products you’ve looked at on another site

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

Which of the following best describes your response to this ad?

- Passive Processing (Noticed Ad)
- Active Processing (Gave Ad Attention)

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”

Total Processing = Passive Processing + Active Processing
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

**Total Respondents**

- **Ad Blockers** (N=330)
- **Continued Non Blockers** (N=478)
- **Past Users** (N=260)
- **Potential Blockers** (N=224)

- **Potential Blockers** (17%)
- **Ad Blockers** (26%)
- **Past Blocker** (20%)
- **Continued Non-Blockers** (37%)

**Ad Blockers** – Confirmed current user of ad blocker on computer

**Past Blockers** – Used an ad blocker in the past 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
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.

<table>
<thead>
<tr>
<th>Potential Blocker (N=224)</th>
<th>Continued Non-Blocker (N=478)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Want Uninterrupted Browsing</strong></td>
<td></td>
</tr>
<tr>
<td>When I am browsing online, I want as few interruptions as possible</td>
<td></td>
</tr>
<tr>
<td>I find messages asking me to subscribe or like a site to be distracting</td>
<td></td>
</tr>
<tr>
<td>I prefer streamlined websites where I can get to what I want quickly</td>
<td></td>
</tr>
<tr>
<td><strong>Concerned About Viruses</strong></td>
<td></td>
</tr>
<tr>
<td>When I am browsing online, I am concerned about getting a virus</td>
<td></td>
</tr>
<tr>
<td>I only visit sites that I know and trust</td>
<td></td>
</tr>
<tr>
<td>I got a virus in the past and am now more cautious when I am online</td>
<td></td>
</tr>
<tr>
<td><strong>Less Ad Tolerant</strong></td>
<td></td>
</tr>
<tr>
<td>I am more annoyed than most people by online ads</td>
<td></td>
</tr>
<tr>
<td>I am easily distracted online</td>
<td></td>
</tr>
<tr>
<td>I feel that I am always in a hurry when I am online</td>
<td></td>
</tr>
</tbody>
</table>

*Strongly Disagree = 1  Neutral  Strongly Agree = 5*
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?

**Continued Non-Blocker (N=478)**

- The ads are taking too long to load and slowing down the page
- The content is taking too long to load and slowing down the page
- Content on site is too heavy (large file sizes)
- Internet speed/WiFi connection
- The ads are too heavy (large file sizes)
- Too many ads on the website
- A slow website in general
- Web browser speed
- Computer speed/performance
- Too many browser windows open
- Too many people visiting the site at the same time
- Neutral

**Potential Blocker (N=224)**

- The ads are taking too long to load and slowing down the page
- Too many ads on the website
- The content is taking too long to load and slowing down the page
- Content on site is too heavy (large file sizes)
- Internet speed/WiFi connection
- Web browser speed
- A slow website in general
- Computer speed/performance
- Too many browser windows open
- Too many people visiting the site at the same time
- Neutral

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

- **Ad Blockers** (N=330): Confirmed current user of ad blocker on computer.
- **Past Blockers** (N=260): Used an ad blocker in the past but currently not installed.
- **Potential Blockers** (N=224): Non-blocker who is likely to use an ad blocker in the next few months.
- **Continued Non-Blockers** (N=478): Non-blocker who is not likely to use an ad blocker in the next few months.
### Why did you stop using an ad blocker or ad blocking extension?

<table>
<thead>
<tr>
<th>Reason</th>
<th>% of Past Blockers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Blocker Prevented me from Viewing Content</td>
<td>33%</td>
</tr>
<tr>
<td>Kept Seeing Messages to Turn Off Ad Blocker to See Content</td>
<td>30%</td>
</tr>
<tr>
<td>I wanted to See Some Ads</td>
<td>25%</td>
</tr>
<tr>
<td>Realized Sites Make Money from Ads</td>
<td>20%</td>
</tr>
<tr>
<td>Ad Blocker Slowed Down Browsing</td>
<td>20%</td>
</tr>
<tr>
<td>Realized Ads on Sites Don’t Bother me</td>
<td>15%</td>
</tr>
<tr>
<td>Just wanted to Try Ad Blocker</td>
<td>15%</td>
</tr>
<tr>
<td>Realized Ads are Safe from Virus</td>
<td>10%</td>
</tr>
<tr>
<td>Accidentally Removed Ad Blocker</td>
<td>10%</td>
</tr>
</tbody>
</table>

---

“I’ve used them in the past. I got annoyed with them because then the website people start figuring it out and making it so you can’t view the websites properly with ad blockers, and just didn’t care enough.”

---

Lab Interview
HOW DO WE FIGHT AD BLOCKING?
AND WIN BACK USERS OF AD BLOCKING
How likely would any of the following scenarios influence you to STOP using an ad blocker?

Ad Blockers  
(N=330)

Extremely Likely = 5

Extremely Unlikely = 1

- Favorite Site Blocks Content
- Site Guarantee of no Auto Start Audio or Video
- Site Guarantee that Ads won't cover Content
- Frequent Blocked Content on Sites
- Site Guarantee Ads won't Slow down Browsing
- Site Guarantee that Ads are Safe From Virus
- Occasional Blocked Content on Sites
- Messages requesting Turn Off Ad Blockers on Sites
- Messages that Sites make money from Ads
- Subscribe for a Fee
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).
Men are More Likely than Women to Unblock

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

**MEN**

- **Loyal Blockers**
- **Potential Switchers**

**WOMEN**

- **Loyal Blockers**
- **Potential Switchers**
Which of the following best describes your attitude about advertising in general

My general opinion of advertising is...

Loyal Blockers
(N=101)

Potential Switchers
(N=229)

Very Bad – I really hate ads and try to avoid them
Bad – I dislike ads more than most people
Neutral – I neither love nor hate ads
Good – I don’t mind ads and sometimes even enjoy viewing ads
Very good – I feel that ads can provide useful information or entertainment
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.

<table>
<thead>
<tr>
<th><strong>LIGHT</strong></th>
<th>Limit the file size of ads to reduce load times.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ENCRYPTED</strong></td>
<td>Ensuring security standards to prevent exposure to harmful malware and viruses.</td>
</tr>
<tr>
<td><strong>AD CHOICE SUPPORTED</strong></td>
<td>Allow users to opt-out of certain data collection services used to create targeted ads.</td>
</tr>
<tr>
<td><strong>NON-INVASIVE ADS</strong></td>
<td>Eliminate Ads with irritating elements such as shaking, blinking, or automatic audio playing.</td>
</tr>
</tbody>
</table>
Consumer Control

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

**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."

**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."

Messaging (Active and Passive) were omitted from Non Blockers.
Concepts Resonate With Potential Unblockers

Likelihood to **turn off/pause** ad blocker

<table>
<thead>
<tr>
<th>Loyal Blockers (N=101)</th>
<th>Potential Unblockers (N=229)</th>
</tr>
</thead>
</table>

Among those who selected Extremely Likely + Likely + Neutral

**LEAN**

- **Active Blocking**: Required to whitelist
- **Passive Blocking**: Asked, NOT required, to whitelist
- **Ad Ratings**
- **Fast Forward**
- **Notification Message**

Analysis used was Top 2 box and Top 3 box as Neutral consisted of a large portion of the population. Question based on 5 point scale from Extremely Unlikely to Extremely Likely.
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.

- **LEAN Eliminates Desire To Block Ads:** Once users hear about LEAN ads, Non-blockers 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 high-propensity 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.

“All that in place, I wouldn’t even need an ad blocker.”

“Definitely the encryption and non-invasive 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.”
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
“...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.

31% Loyal Blockers

69% Potential Switchers

Certain Ad Elements and Formats Drive Ad Blocking

Ads That Block Content
- Ads That Follow Me Down the Page
- Long Video Ads Before Short Video

Ads That Block Content
- Pop-Ups

Past Blockers & Current Blockers could be in equilibrium?

Past Users
- 20%

Current Ad Blockers
- 26%

Potential Blockers
- 17%

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

Ad Standards
- LEAN

Consumer Control
- Ad Ratings
- Fast Forward
- Notification Message

Certain Ad Elements and Formats Drive Ad Blocking

- Ads That Block Content
- Ads That Follow Me Down the Page
- Long Video Ads Before Short Video
- Pop-Ups

QUESTIONS?

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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.”
Population Weighted % of Ad Blockers by Gender and Age

**MEN**  
(N=104)

- 18 to 24: 10% % of Ad Blockers, 10% % of US Adult Pop.
- 25 to 34: 10% % of Ad Blockers, 10% % of US Adult Pop.
- 35 to 44: 10% % of Ad Blockers, 10% % of US Adult Pop.
- 45 to 54: 10% % of Ad Blockers, 10% % of US Adult Pop.
- 55 to 64: 10% % of Ad Blockers, 10% % of US Adult Pop.
- 65 and over: 10% % of Ad Blockers, 10% % of US Adult Pop.

**WOMEN**  
(N=90)

- 18 to 24: 10% % of Ad Blockers, 10% % of US Adult Pop.
- 25 to 34: 10% % of Ad Blockers, 10% % of US Adult Pop.
- 35 to 44: 10% % of Ad Blockers, 10% % of US Adult Pop.
- 45 to 54: 10% % of Ad Blockers, 10% % of US Adult Pop.
- 55 to 64: 10% % of Ad Blockers, 10% % of US Adult Pop.
- 65 and over: 10% % of Ad Blockers, 10% % of US Adult Pop.

Note: Small base size. Use directionally.
Among Smartphone Blockers, Half Surveyed Use Chrome

Browsers Used by Those Who Use an Ad Blocker on Smartphone (%)

(N=76)

<table>
<thead>
<tr>
<th>Browsers</th>
<th>Ad Blocker</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google Chrome</td>
<td>54</td>
</tr>
<tr>
<td>Safari</td>
<td>26</td>
</tr>
<tr>
<td>Internet Explorer</td>
<td>12</td>
</tr>
<tr>
<td>Firefox for Mobile</td>
<td>5</td>
</tr>
<tr>
<td>Opera</td>
<td>1</td>
</tr>
<tr>
<td>Iris Browser</td>
<td>1</td>
</tr>
</tbody>
</table>

*Small base size. Use directionally.*
<table>
<thead>
<tr>
<th><strong>Computer</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Billboard</strong> ads that are large interactive ads that appear at top of web pages</td>
</tr>
<tr>
<td><strong>Pop-up ads</strong> that appear in front of content and have a close button to continue to content</td>
</tr>
<tr>
<td><strong>In Page Video ads</strong> that play in an ad outside of a video player</td>
</tr>
<tr>
<td><strong>Full Page ads</strong> that appear before moving to a page, generally with a button to continue to content</td>
</tr>
<tr>
<td><strong>In Stream Video ads</strong> that play in a video player before video content begins</td>
</tr>
<tr>
<td><strong>Video Overlay ads</strong> that are static ads that appear on top of a video at the bottom of the player</td>
</tr>
<tr>
<td><strong>Traditional</strong> box shaped ads that appear on the side of a page</td>
</tr>
<tr>
<td><strong>Background ads</strong> that are large static ads that wrap around the content/background of a web page.</td>
</tr>
<tr>
<td><strong>Recommendation</strong> articles that appear as recommended content that link to an external website. Ads are typically labeled with “Sponsored Links” in the corner.</td>
</tr>
<tr>
<td><strong>Sponsored Articles</strong> are content on a website sponsored by a 3rd party company, but keep user within the website when clicked on.</td>
</tr>
<tr>
<td>Type</td>
</tr>
<tr>
<td>----------------------</td>
</tr>
<tr>
<td><strong>Banner ads</strong></td>
</tr>
<tr>
<td><strong>Pop-up ads</strong></td>
</tr>
<tr>
<td><strong>In Page Video ads</strong></td>
</tr>
<tr>
<td><strong>Full Page ads</strong></td>
</tr>
<tr>
<td><strong>In Stream Video ads</strong></td>
</tr>
<tr>
<td><strong>Traditional</strong></td>
</tr>
<tr>
<td><strong>Sticky Banner ads</strong></td>
</tr>
</tbody>
</table>