Ad Blocking

Consumer Usage and Attitudes

February 2019

iab. UK

What is ad blocking?

Ad blockers can remove or alter advertising content from a web browser, website, or mobile app. People can choose to install ad blocking software themselves, but software has also been introduced by some browsers and mobile operators too. This report looks into software people have specifically chosen to install.

In reality, the most popular ad blocking software can be selective; blocking most types of adverting but allowing some of it to still be served.

Top reasons people give for downloading ad blocking software include to:

Block some or
all adverts
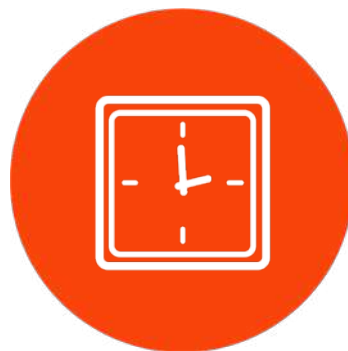
Improve device
performance

Protect their
privacy

Why is it a problem?

Ad blocking, at either a total or selective level, makes it harder for advertisers to reach some audiences, as well as limiting income to publishers and platforms, which are primarily free to use and funded by advertising. If ad blockers select which ads are allowed to be served, they can do this at their own discretion, without consulting publishers, advertisers or the users of the internet.

There are many steps that the industry is taking to discourage ad blocking, including the formation of the Coalition for Better Ads, an organisation that measures which ad formats people find most irritating and encourages the industry not to use them. The formats found to be most annoying from this initiative have now been blocked by some web browsers. Other initiatives include encouraging adoption of IAB LEAN principles (light, encrypted, ad choice supported and non-invasive ads), educating people about the value change and asking people to switch ad blockers off in order to be able access some content.

IAB UK have been tracking the number of people who claim to have downloaded ad blocking software over the last four years. IAB UK are continuing to track this to inform a future strategy around ad blocking, as well as to see what effects, if any, initiatives to discourage ad blocking are having on consumer ad blocking adoption and usage. The IAB Gold Standard, set up in 2017, aims to reduce ad fraud, increase brand safety and improve the digital advertising experience. All Gold Standard certified companies must adhere to the IAB LEAN principle of non-invasive ads set by the Coalition for Better Ads as a first step towards improving the digital advertising experience.

iabuk.com/goldstandard | betterads.org

Key Takeaways

How many people are using an ad blocker in the UK?

- Ad blocking levels have been relatively stable for the past three years - 22.6% of GB Online Adults claim to currently be blocking ads

Which demographics are most likely to use ad blockers?

- Males are almost twice as likely to block ads than females. 18-24's remain the most likely age group to have installed an ad blocker

Why are people blocking ads?

- The main reason remains to block all types of adverts. Privacy protection, avoiding getting a virus and improving device performance were also chosen as key drivers

What would make people less likely to block ads?

- Almost 4 in 5 current ad blockers selected scenarios where they would be less likely to use one. A better ad experience and increased user control were amongst the highest options selected

What can the industry do?

- Continue initiatives directed at providing a better advertising experience and reminding people about the value exchange. If efforts to improve the user experience drop, we could see a rise in the number of people choosing to install ad blockers

Tracking ad blocking levels

iab UK have been tracking claimed ad blocking levels over the past four years

Quantitative method:

YouGov®

online omnibus

Sample:

2,034 GB online adults, aged 18+ weighted to represent the GB adult population.

Dates:

21st-22nd Feb 2019

Previous waves conducted Feb 2018, Feb 2017, Feb 2016, Oct 2015, June 2015 and March 2015.

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Current ad blockers, Feb 2019 **22.6**%

People who have ever downloaded and ad blocker AND are currently using one

Q: For the following set of questions, please only think about the devices (e.g. laptop, smartphone etc.) that you personally own (i.e. not including those provided by work)…Have you EVER downloaded software/ apps on any of your personal devices that allows you to block adverts on the internet? Base: All GB Adults Online (2034) And do you currently use software/ apps on any of your personal devices (e.g. laptop, smartphone etc.) that allows you to block adverts on the internet? Base: All GB adults online who have ever downloaded software/ apps on any of their personal devices that allows them to block adverts on the internet (598)
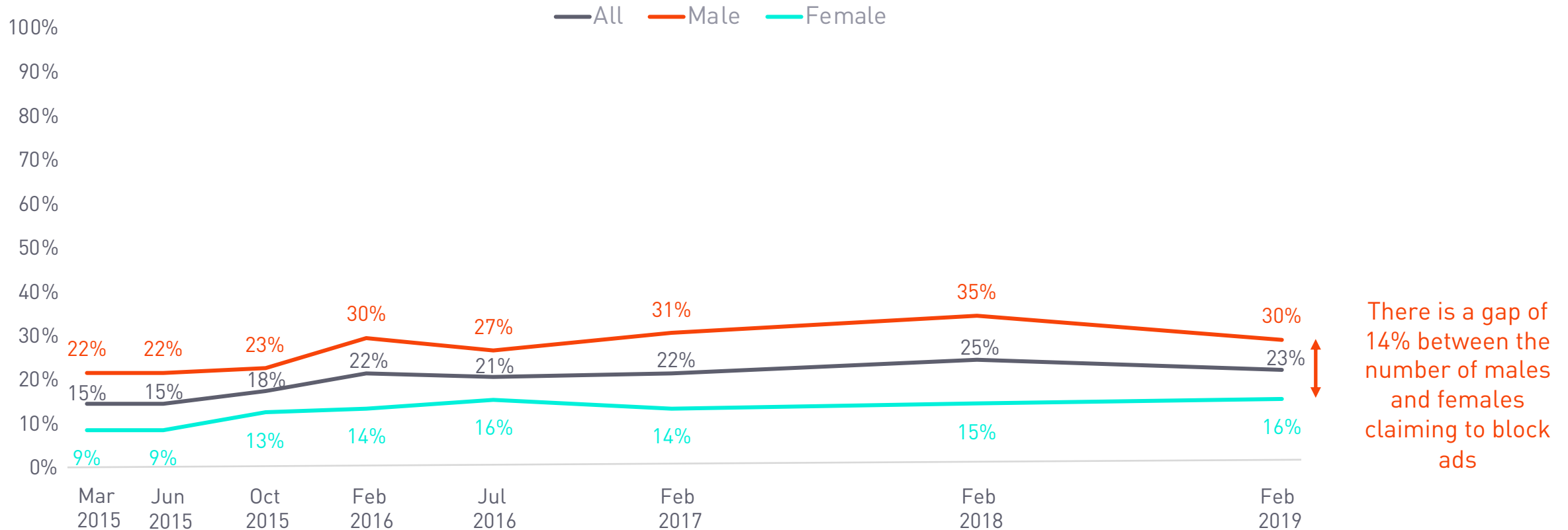
Ad blocking levels have remained relatively consistent since 2016

Currently use software to block internet ads:

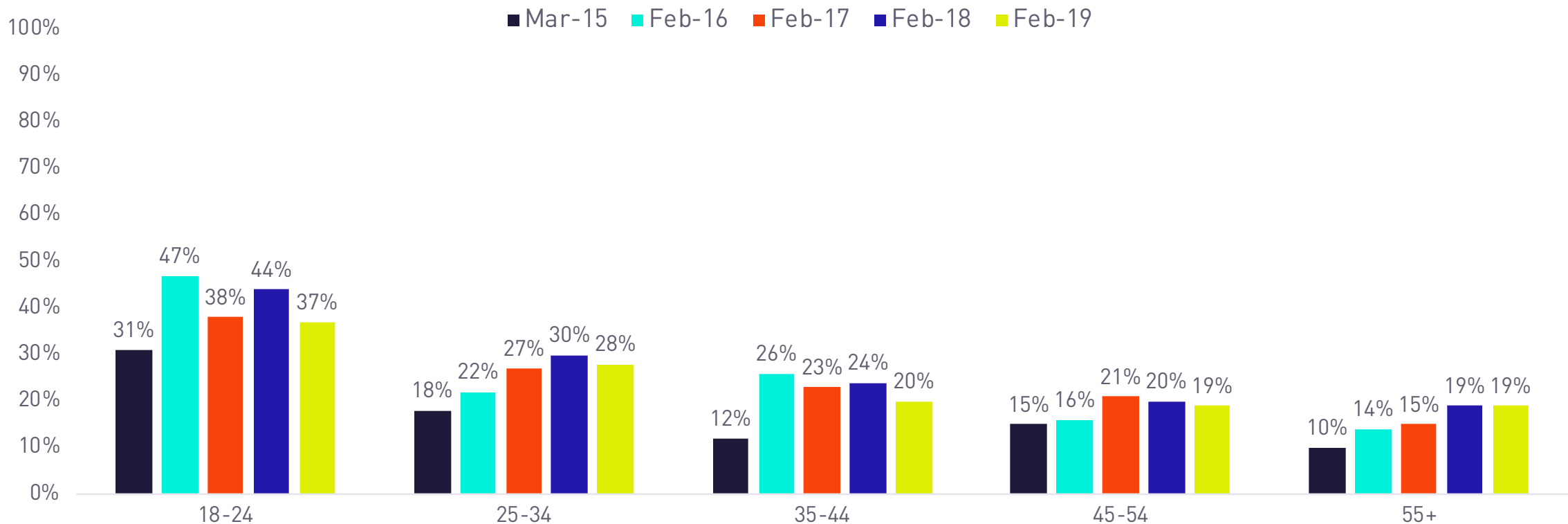|	Mar 15	Jun 15	Oct 15	Feb 16	Feb 17	Feb 18	Feb 19
	15.1%	15.1%	17.8%	22.1%	21.2%	24.6%	22.6%
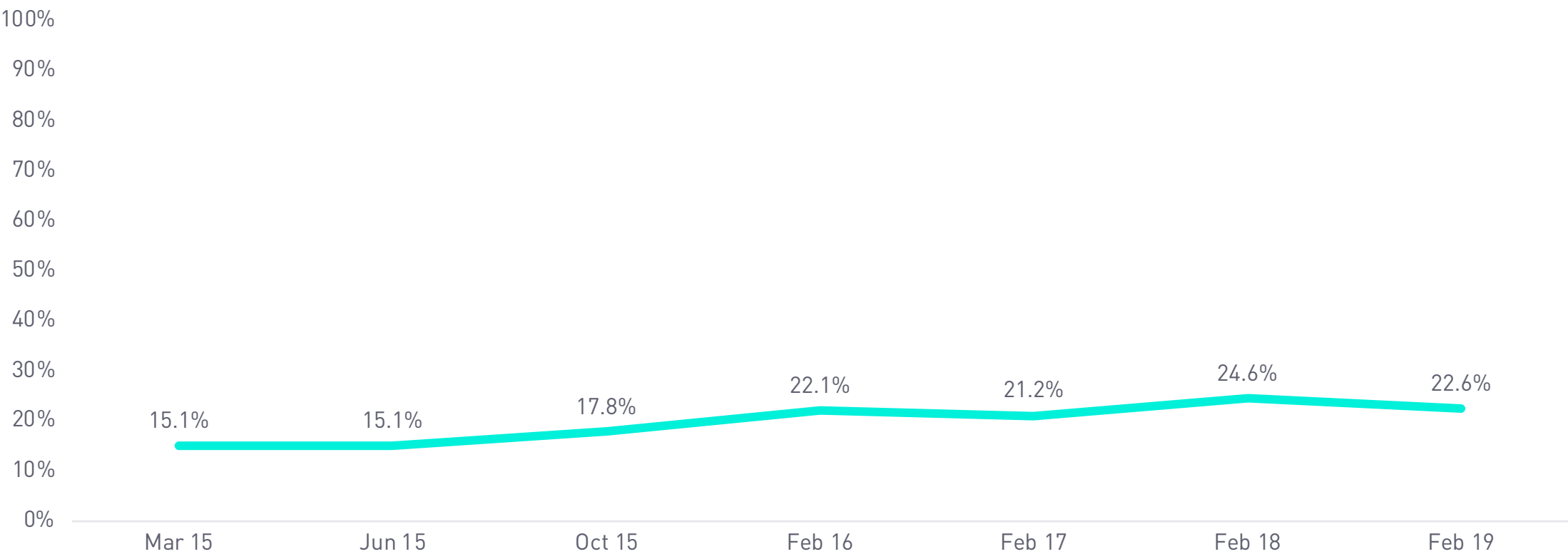
Males are almost 2x more likely to use an ad blocker than females

Currently use software to block internet ads:

There is a gap of 14% between the number of males and females claiming to block ads

18-24's remain the most likely to currently use an ad blocker

Currently use software to block internet ads:

Legend: Mar-15, Feb-16, Feb-17, Feb-18, Feb-19

18-24: 31%, 47%, 38%, 44%, 37%
25-34: 18%, 22%, 27%, 30%, 28%
35-44: 12%, 26%, 23%, 24%, 20%
45-54: 15%, 16%, 21%, 20%, 19%
55+: 10%, 14%, 15%, 19%, 19%
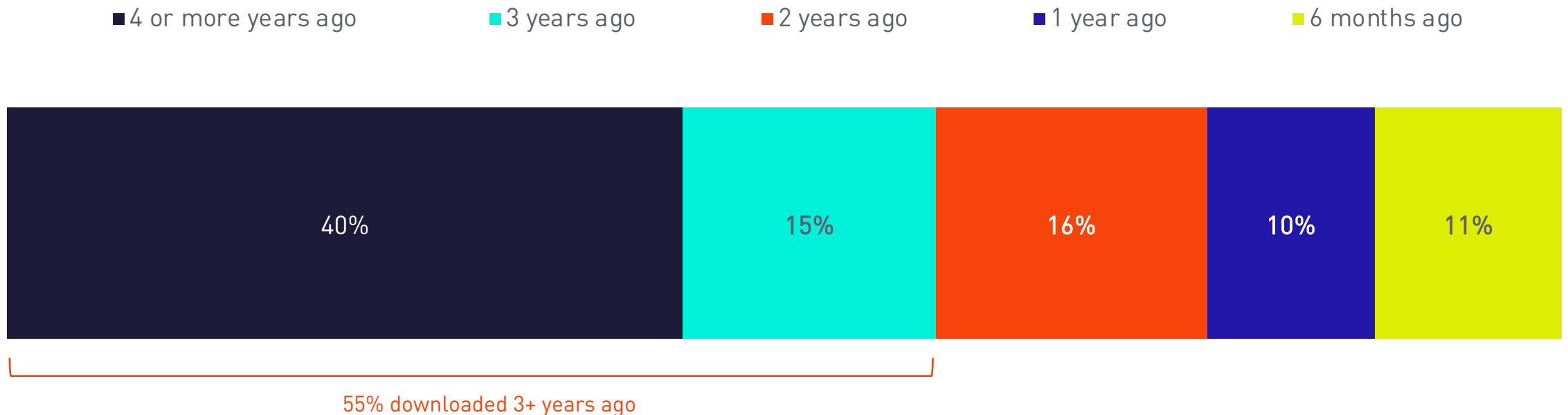
Over half of all ad blockers have been doing so for 3+ years

When first downloaded ad blocking software:

The majority of current ad blockers have been doing so for 3+ years. Broadly speaking, we are looking at an established market rather than a recent spike in downloads
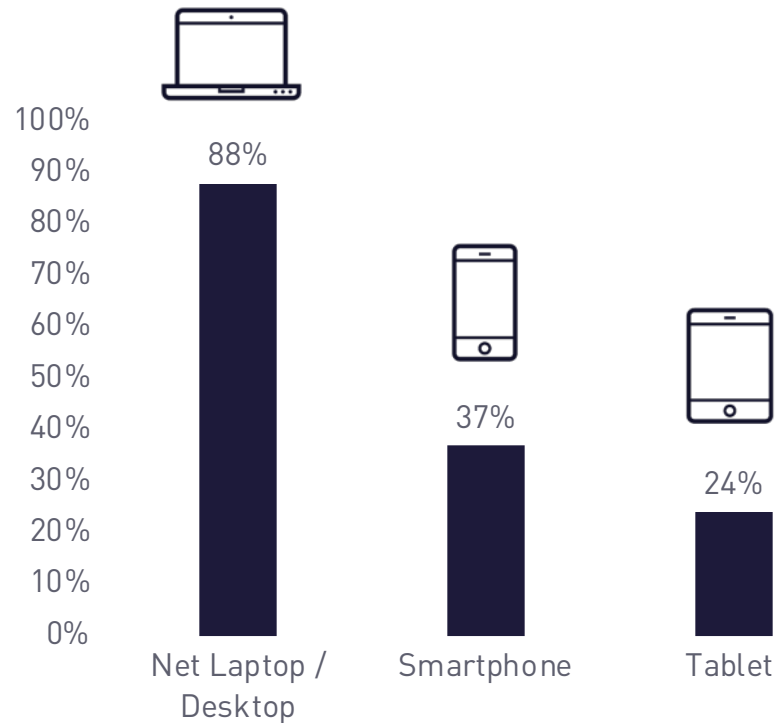
- ■ 4 or more years ago
- ■ 3 years ago
- ■ 2 years ago
- ■ 1 year ago
- ■ 6 months ago

| 40% | 15% | 16% | 10% | 11% |

55% downloaded 3+ years ago

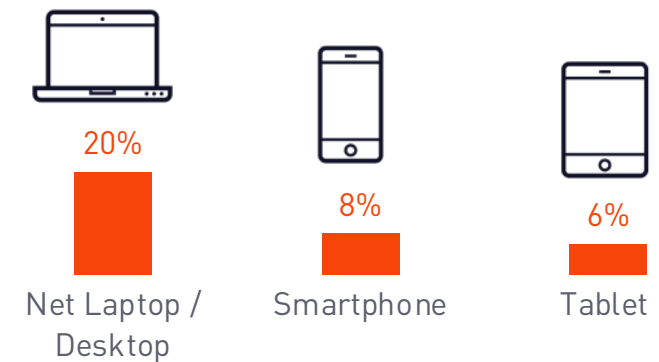Which devices are people using ad blockers on?

Desktop and laptop computers are the most common devices to install ad blocking software on, with almost 2 in 5 GB adults claiming to have done so
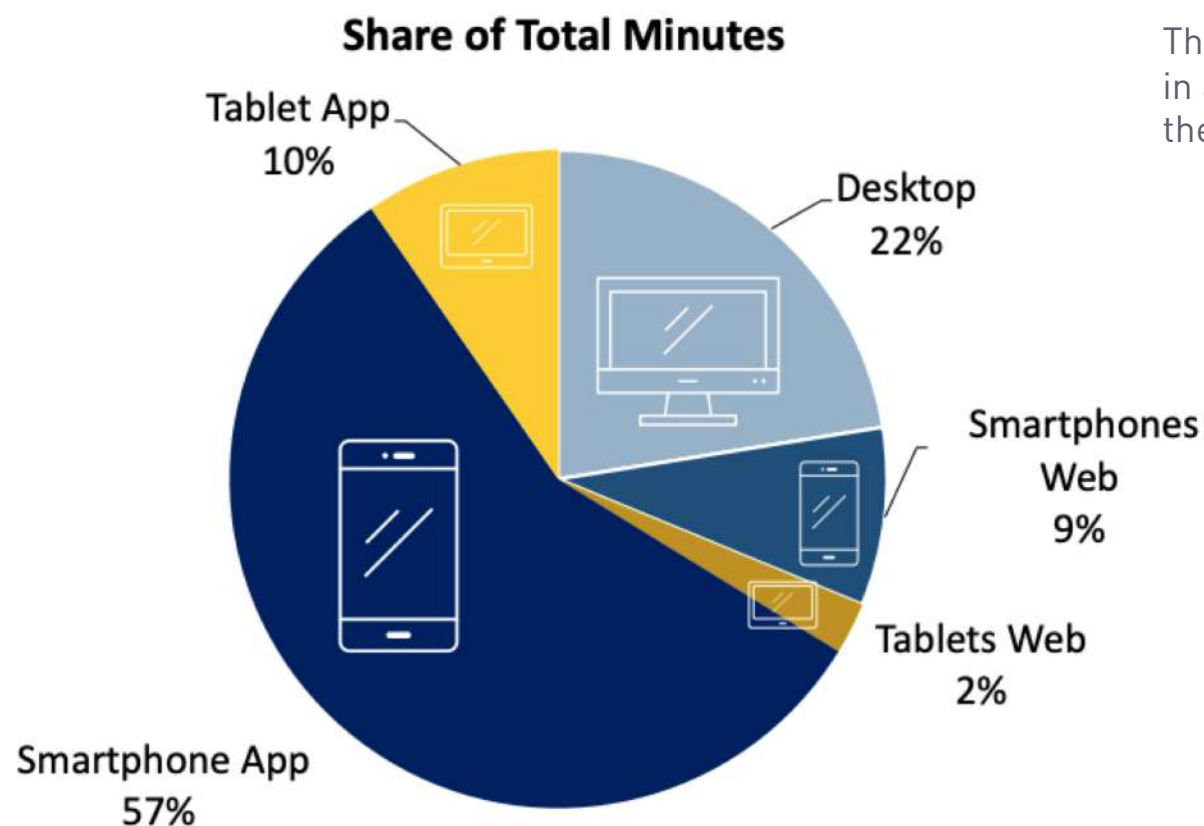
% of all current ad blockers, by device:

% of all GB online adults, by device:

- Net Laptop / Desktop: 88%
- Smartphone: 37%
- Tablet: 24%

- Net Laptop / Desktop: 20%
- Smartphone: 8%
- Tablet: 6%

Comscore audience data, endorsed by UKOM, illustrates that the most popular devices to install ad blocking software on have the least amount of time spent with them

The majority of ad blockers are ineffective in an app environment, which is where the majority of time online is spent

Share of Total Minutes

Tablet App 10%

Desktop 22%

Smartphones Web 9%

Tablets Web 2%

Smartphone App 57%

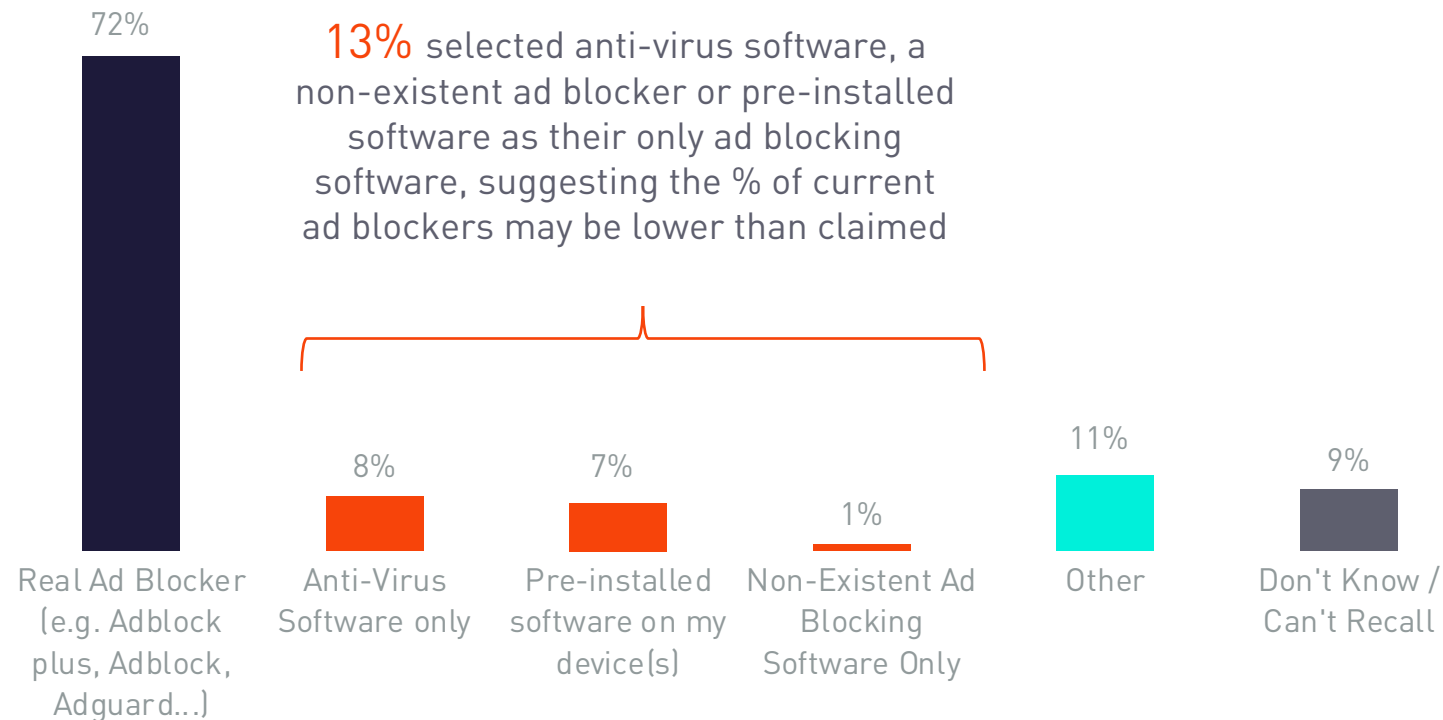Actual levels of ad blocking may be lower than this

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Over 1 in 10 current ad blockers selected anti-virus software or a non-existent ad blocker as their only means of blocking ads

Software used to block online ads:

IAB UK, consumer claimed data, Feb 2019:

22.6%

Currently using an ad blocker

72%

13% selected anti-virus software, a non-existent ad blocker or pre-installed software as their only ad blocking software, suggesting the % of current ad blockers may be lower than claimed

Removing these 13% suggest that real ad blocking levels could be closer to:

19.7%

Currently using an ad blocker

| 8% | 7% | 1% | 11% | 9% |

Real Ad Blocker (e.g. Adblock plus, Adblock, Adguard...)

Anti-Virus Software only

Pre-installed software on my device(s)

Non-Existent Ad Blocking Software Only

Other

Don't Know / Can't Recall

A comparison with Comscore's ad blocking tracker further suggests the number of ad blockers may be lower than claimed

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Claimed behaviour

22.6%

OR

19.7%

(removing those who selected anti-virus software, pre-installed software or a fake ad blocker only)

Quantitative method:

YouGov
online omnibus

Sample:

2,034 GB online adults, aged 18+

Dates:

21st – 22nd Feb 2019

comscore

Panel & tagging

17.8%

Method:
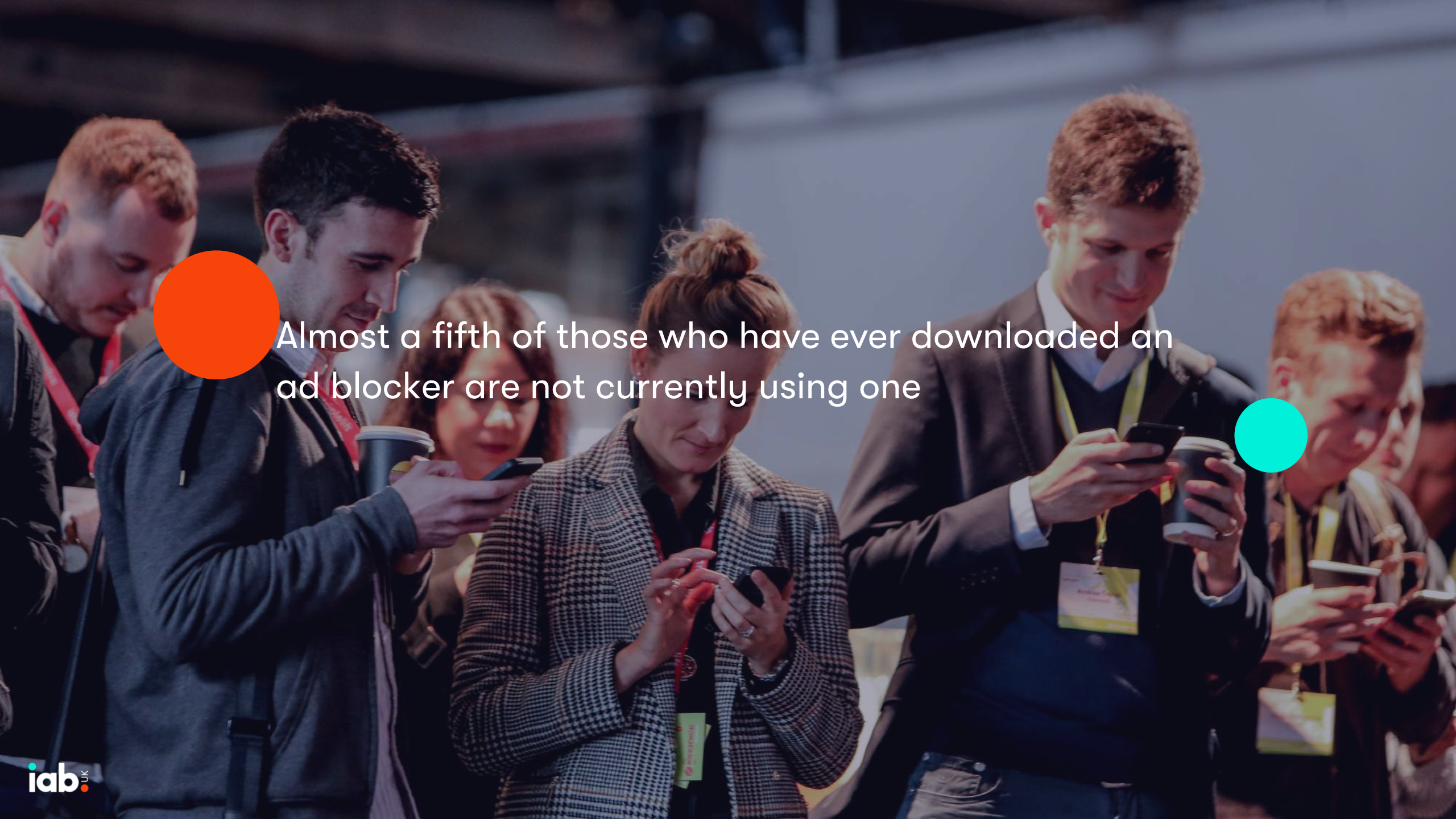
Comscore tracking methodology

Sample:

Comscore panel. Desktop/laptop only

Dates:
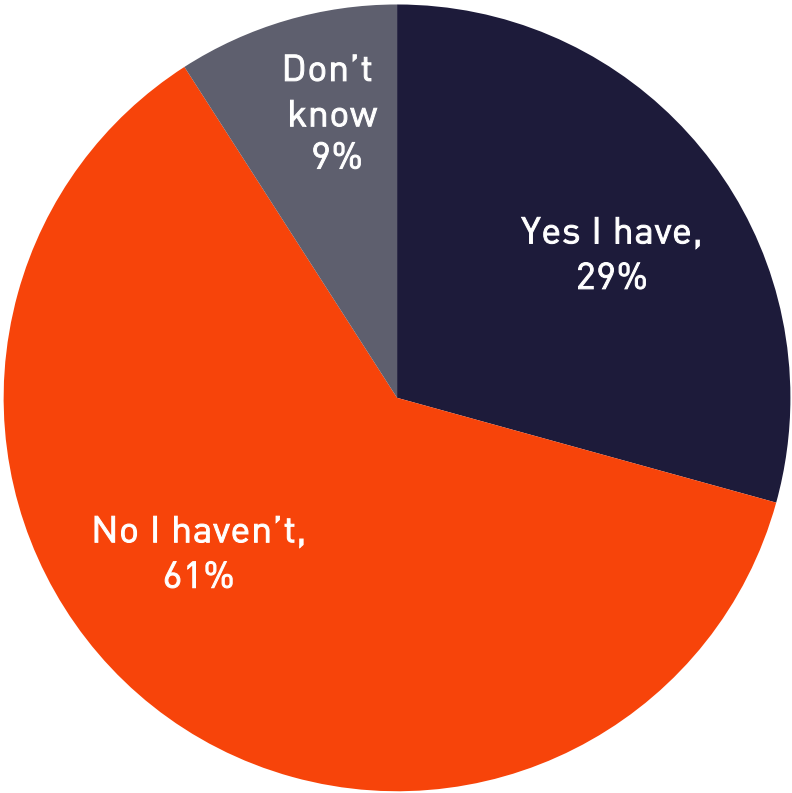
Jan 2019
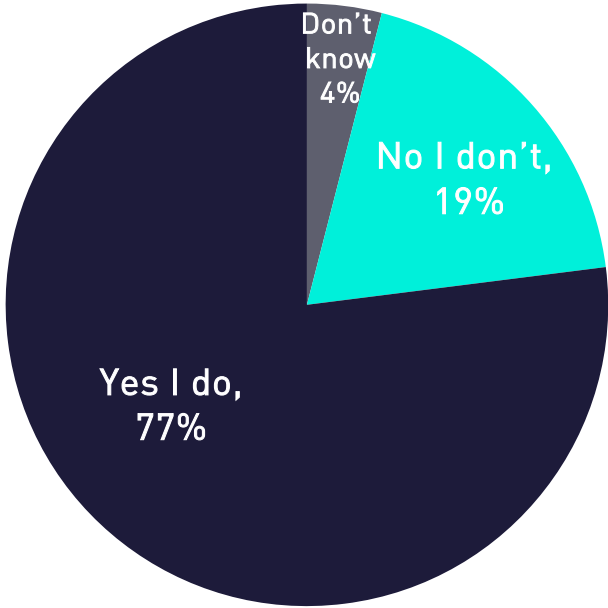
Almost a fifth of those who have ever downloaded an ad blocker are not currently using one

Just under a third of adults claim to have ever downloaded an ad blocker, however, almost a fifth of those that have are not currently using one

Have you ever downloaded software
to block internet ads?

Don't know 9%

Yes I have, 29%

No I haven't, 61%
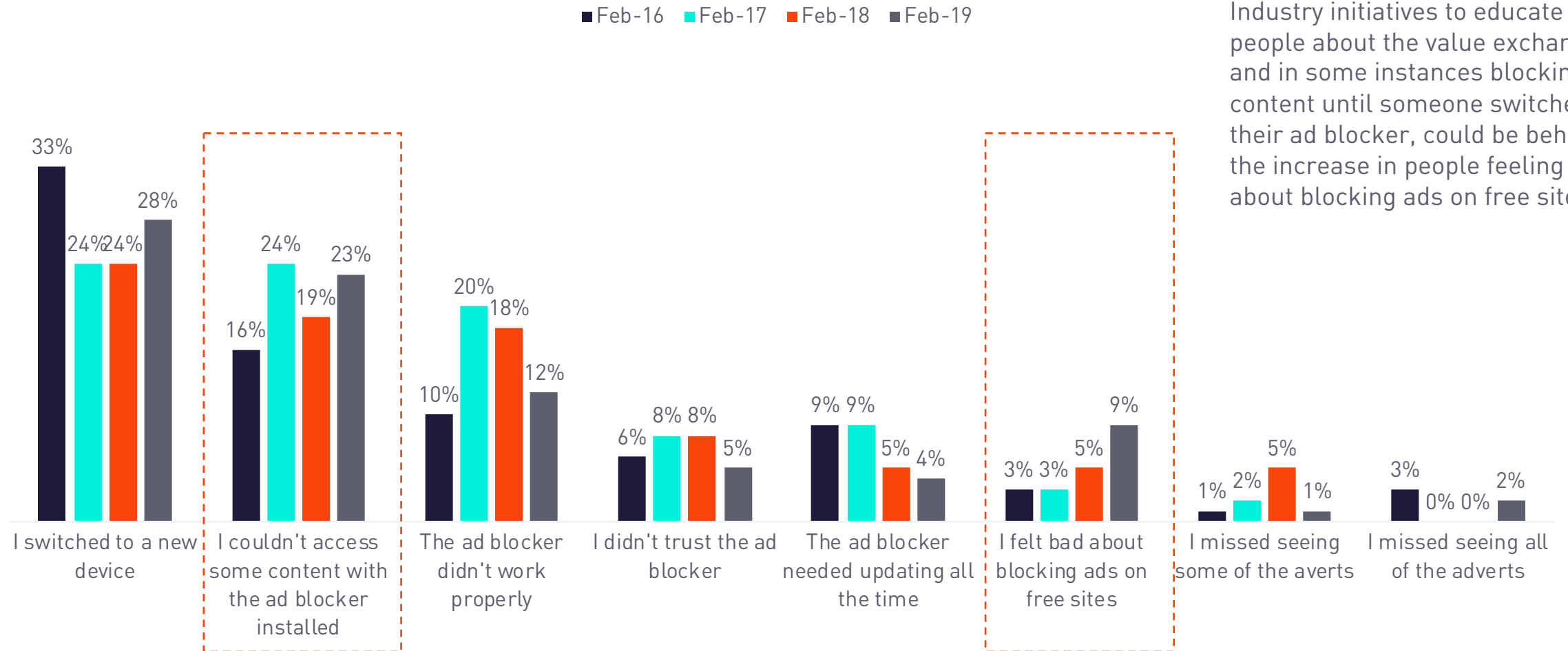
Do you currently use software
to block internet ads?
(asked of those who have ever downloaded)

Don't know 4%

No I don't, 19%

Yes I do, 77%

Q: For the following set of questions, please only think about the devices (e.g. laptop, smartphone etc.) that you personally own (i.e. not including those provided by work)...Have you EVER downloaded software/ apps on any of your personal devices that allows you to block adverts on the internet? Base: All GB Adults Online (2034) And do you currently use software/ apps on any of your personal devices (e.g. laptop, smartphone etc.) that allows you to block adverts on the internet? Base: All GB adults online who have ever downloaded software/ apps on any of their personal devices that allows them to block adverts on the internet (598)

Reinstalling ad blocking software often isn't prioritsed when switching devices

Main reason for not currently using an ad blocker, even though downloaded in the past:

■ Feb-16 ■ Feb-17 ■ Feb-18 ■ Feb-19

Industry initiatives to educate people about the value exchange, and in some instances blocking content until someone switches off their ad blocker, could be behind the increase in people feeling bad about blocking ads on free sites

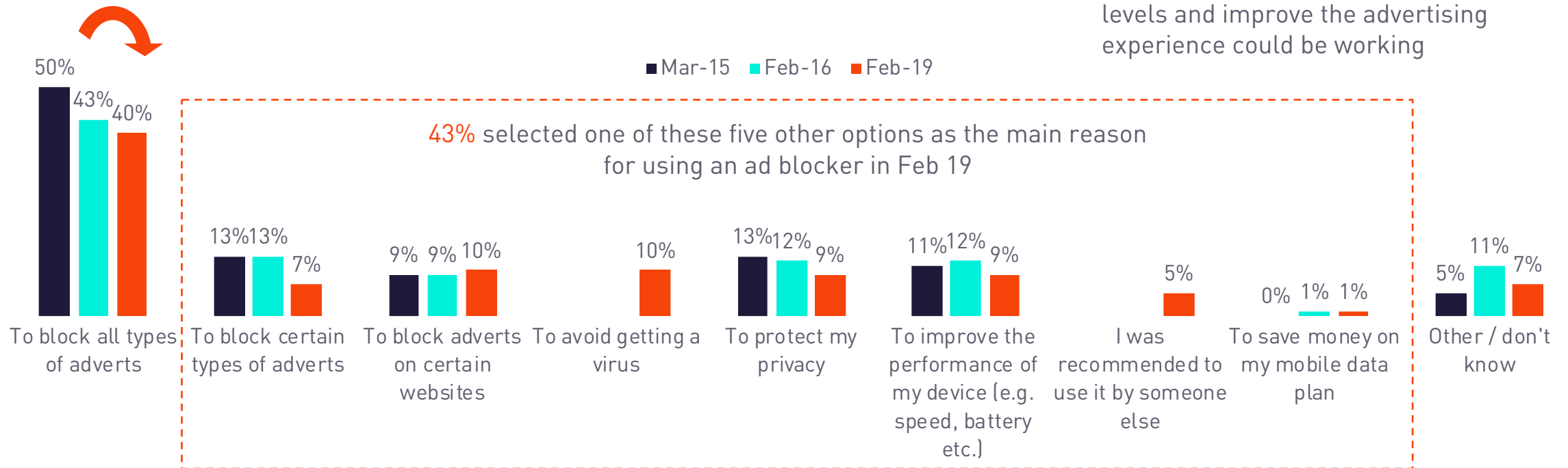|	I switched to a new device	I couldn't access some content with the ad blocker installed	The ad blocker didn't work properly	I didn't trust the ad blocker	The ad blocker needed updating all the time	I felt bad about blocking ads on free sites	I missed seeing some of the averts	I missed seeing all of the adverts
Feb-16	33%	16%	10%	6%	9%	3%	1%	3%
Feb-17	24%	24%	20%	8%	9%	3%	2%	0%
Feb-18	24%	19%	18%	8%	5%	5%	5%	0%
Feb-19	28%	23%	12%	5%	4%	9%	1%	2%

Why are people using ad blockers?

The main reason to use an ad blocker remains to block all ads, with 2 in 5 citing this as their motivation

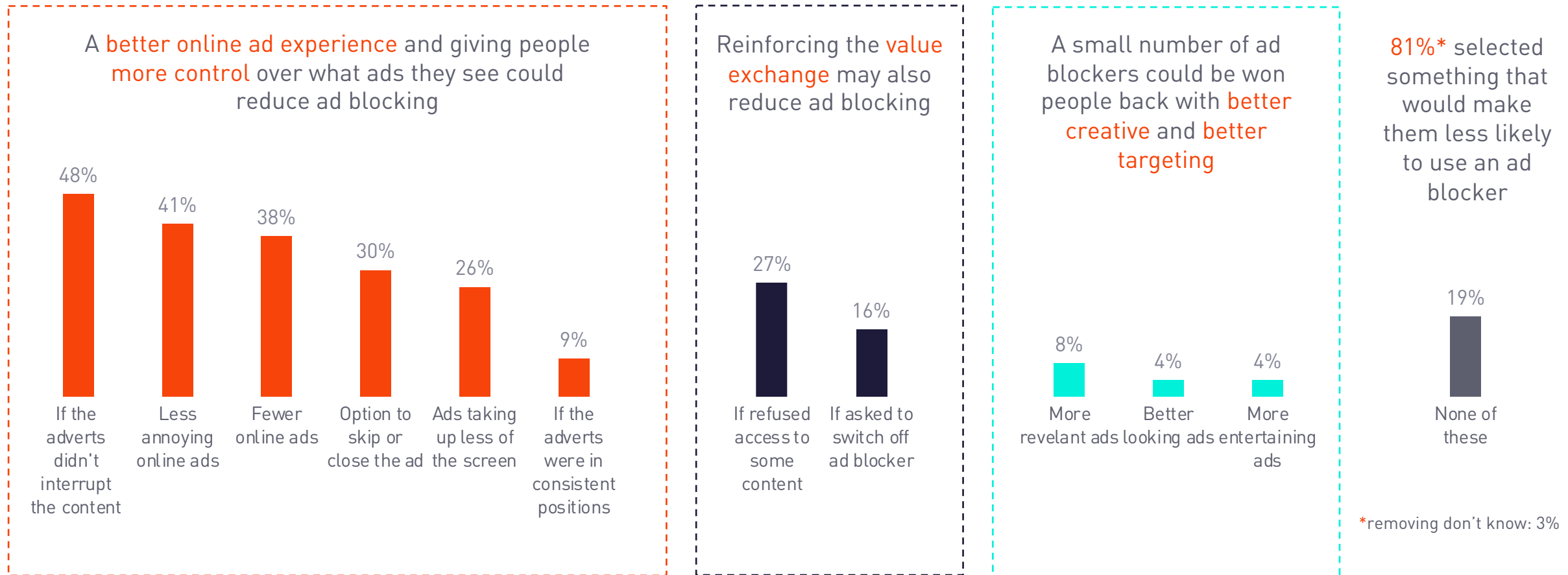Main reason for currently using an ad blocker:

The number of people claiming to have installed an ad blocker to block all types of adverts has significantly decreased in the last four years, another indication that work the industry is doing to reduce ad blocking levels and improve the advertising experience could be working

Statistically significant decrease (99% confidence)

■ Mar-15 ■ Feb-16 ■ Feb-19

43% selected one of these five other options as the main reason for using an ad blocker in Feb 19

	To block all types of adverts	To block certain types of adverts	To block adverts on certain websites	To avoid getting a virus	To protect my privacy	To improve the performance of my device (e.g. speed, battery etc.)	I was recommended to use it by someone else	To save money on my mobile data plan	Other / don't know
Mar-15	50%	13%	9%		13%	11%		0%	5%
Feb-16	43%	13%	9%		12%	12%		1%	11%
Feb-19	40%	7%	10%	10%	9%	9%	5%	1%	7%

What would make people less likely to use an ad blocker?

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81% of those who currently use an ad blocker selected situations from a list that would make them less likely to use one

Situations that may make people less likely to use ad blockers:

A **better online ad experience** and giving people **more control** over what ads they see could reduce ad blocking

- 48% — If the adverts didn't interrupt the content
- 41% — Less annoying online ads
- 38% — Fewer online ads
- 30% — Option to skip or close the ad
- 26% — Ads taking up less of the screen
- 9% — If the adverts were in consistent positions

Reinforcing the **value exchange** may also reduce ad blocking

- 27% — If refused access to some content
- 16% — If asked to switch off ad blocker

A small number of ad blockers could be won people back with **better creative** and **better targeting**

- 8% — More revelant ads
- 4% — Better looking ads
- 4% — More entertaining ads

81%* selected something that would make them less likely to use an ad blocker

- 19% — None of these

*removing don't know: 3%
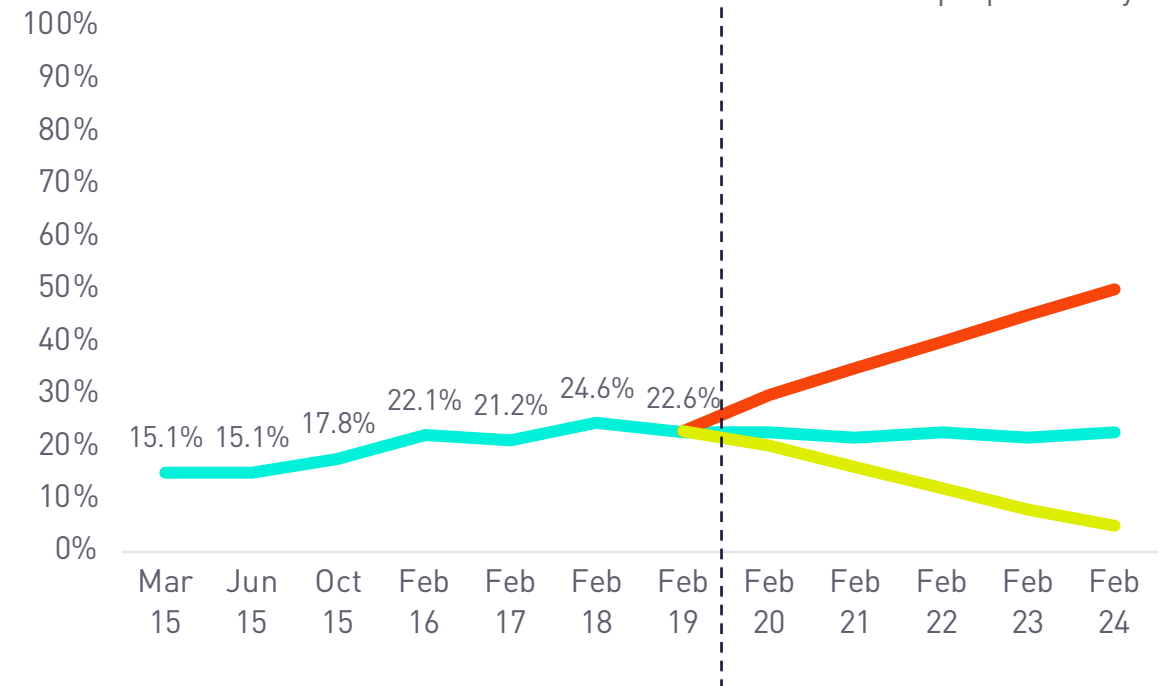
Next steps for the industry…

What does the industry need to do to ensure ad blocking levels at worst stay stable, or at best start to decline?

Though we've seen ad blocker user growth stabalise, almost 23% actively choosing to block online adverts remains a concern for the industry and efforts to prevent this number rising need to continue

It's very difficult to track whether current initiatives to discourage ad blocking are working, but it is clear that a bad user experience, be that through ad clutter, disruption, slow load times or pushing privacy boundaries has contributed to audiences choosing to block ads in the first place

We should therefore be focusing on the root cause, by showing respect for the end user and meeting users halfway in the value exchange by offering interesting, entertaining or useful ads in non-disruptive formats

% currently blocking ads:

Three future scenarios, for illustrative purposes only:

100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%

15.1% 15.1% 17.8% 22.1% 21.2% 24.6% 22.6%

Mar 15 | Jun 15 | Oct 15 | Feb 16 | Feb 17 | Feb 18 | Feb 19 | Feb 20 | Feb 21 | Feb 22 | Feb 23 | Feb 24

— Keeping consistent with industry efforts to reduce ad blocking

— Giving up on initiatives to discourage ad blocking

— Doing more to discourage ad blocking

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Industry steps

The industry is currently addressing ad blocking in a number of ways, including:

Better Online Experience

All IAB UK Gold Standard Certified companies have committed to:

1. Not using 'bad' ad formats identified by the Coalition of Better Ads (CBA). The CBA was developed by leading international trade associations and companies in the online media ecosystem, who have joined forces in order to improve the consumer experience online

   betterads.org

2. Adhere to the IAB Tech Lab LEAN principle of non-invasive ads:

   - Lean

   - Encrypted

   - Ad choice supported

   - Non–invasive

   iabtechlab.com/standards/ad-blocking/lean/

Value Exchange

The IAB's DEAL guidance outlines a framework for Publishers to communicate and enter into dialogue with consumers who employ ad blockers, with the purpose of ensuring a clear understanding amongst consumers of how ad blocking affects the value exchange.

- Detect ad blocking, in order to initiate a conversation

- Explain the value exchange that advertising enables

- Ask for changed behaviour in order to maintain an equitable exchange

- Lift restrictions or Limit access in response to consumer choice

iabuk.com/deal

Better Creative

IAB UK's Fit for Purpose Research and Creative Best Practice Principles both bang the drum for more ads to be optimised for the right platform in order to improve user experiences online. General principles for creative best practice include:

- Understand and keep focus on your campaign objective

- Understand what works for your target audience

- Create multiple assets for different devices

- Use clear branding and key messages

- Invest in research to understand what is working (and what is not!)

iabuk.com/fitforpurpose

Iabuk.com/standards-guidelines