

The US Ad-Blocking Usage Report 2019

Know your ad-blocking audience



Contents

Looking ahead 03

Reaching the tipping point 05

Two ecosystems 06

Methodology 8

Circumventing user preference 09

The importance of online advertising - users get it! 13

Building better ads for tomorrow 17

Time for change 21

Conclusion 23

Looking ahead

3

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of US ad-blocking users polled primarily downloaded an ad blocker to block invasive or excessive forms of advertising.

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of US ad-blocking users would be unlikely to return to a website which had disabled their ad blocker without their permission.

71%

of US online users stated they understood that publishers rely on advertising to keep their content free.

45%

of US online users expect invasive forms of advertising to still exist in 10 years' time.

39%

of US online users polled rarely click on ads, with a further **19 percent** stating they never click on ads.

32%

of US online users polled believe that advertisers will learn to develop better quality advertising, which users are happy to see.

83%

of US ad-blocking users would be "annoyed" if a website disabled their ad blocker without their permission.

When asked what would make ad-blocking users in the US turn off their ad-blocking software, those polled said:

They would be likely to turn off their ad-blocking software if a website put up a banner asking them to turn it off.

38%

They would be unlikely to turn off their ad-blocking software if a website demanded they do so in order to view content.

44%

They would likely turn off their ad-blocking software if they could be assured of an ad-light experience.

60%

They would likely turn off their ad-blocking software if security and privacy concerns were addressed.

68%

Reaching the tipping point

71 percent of US online users polled stated they understood publishers rely on advertising to keep their content free.

5

Online users are frustrated with the advertising component of their online experience. For years they have been subjected to advertising they often perceive as invasive and/or excessive, sold to them as the trade-off for receiving free content when they go on the Internet.

Many argue, “why should I have to sit through an advertisement, which holds no interest to me, when I can easily skip past an ad in a newspaper or magazine?” It’s largely because of this that a significant share in the US are now saying no to ads – in fact, research suggests it could be as many as one-in-four US Internet users are now taking

responsibility for their online experience by blocking ads. This equates to 70 million people.¹

The ad-blocking phenomenon grew because people no longer wanted ads disrupting their online experience. This includes ads which are heavily animated or cover the content you actually want to view. From our research, **57 percent** of US ad-blocking users primarily downloaded an ad blocker to block invasive or excessive forms of advertising.

¹ <https://www.emarketer.com/content/demanding-a-better-ad-experience>

Two ecosystems

The ad-blocking ecosystem is a sizeable segment of every website's total audience who – surprise – are amenable to advertising.

6

Despite ad-blocking adoption being strong in the US, online users in general are not oblivious to the role advertising plays in keeping the internet free.

71 percent of US online users polled understand publishers rely on advertising to keep their content free. This is why we're seeing ad-filtering replacing total ad-blocking.

Online users don't want to do away with advertising. They simply want greater influence over their online experience. Many publishers and advertisers are willing to meet online users in the middle and are actively developing better, high-quality forms of sustainable advertising.

But the truth is, most people simply don't know about this second, ad-filtering ecosystem. Nor are they aware that there are already a number of solutions to reaching this segment on its own terms.

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If ad blocking is a concern, it is mostly assumed this segment is lost. The rise of ad-filtering has changed all that, because it opens up a second ecosystem of users amenable to an ad-light experience.

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Total ad blocking is already declining, with only one major desktop ad blocker still providing it out of the

7

box. The hope is as ads become less invasive, the demand for this sort of scorched-earth, block-'em-all approach will decrease further, creating a balanced digital world where content and ads coexist, and publishers are able to increase their revenue.

But there are those who remain skeptical. Many are taking measures into their own hands, through a number of countermeasures designed to challenge user preference for content-filtering or all-out content blocking.

This research shines light on user attitudes and behaviors towards ad blocking and advertising, with the aim of providing insight into the long-term

sustainability of digital advertising amongst publishers, advertisers, and online users. In particular, it shows the enormous potential of this parallel ecosystem of ad-filtering users.

The survey follows on from research conducted in Great Britain in January 2019 looking at users' attitudes and behaviors towards advertising. As we go on to explain in this study, there are clear parallels between the results from both countries; demonstrating these results should not be viewed in isolation. They are reflective of a global concurrence towards online advertising and the desire amongst users to have control over their online experience.

Methodology

8

In April 2019, YouGov conducted market research on behalf of eyeo, the parent-company of Adblock Plus, Trusted News and Flatlr, to determine online user preferences and behaviors towards online advertising and the use of ad blockers.

Key themes discussed in this study include the acceptance of online advertising amongst online

users in the US, perceptions of the tactics employed by advertisers to challenges such as ad blocking and the future of online advertising.

The research polled over **2,500 (2,568)** US online users. Of this number, **1,382** of participants (2) registered as having an ad blocker installed on their digital devices.

2 The purpose of this study is to determine online user preferences and behaviors towards online advertising and the use of ad blockers. As the majority of questions asked could only be asked of the group with an ad blocker installed on their digital devices, the sample size was weighted greater than the average ad-blocking adoption rates seen in the US.
<https://www.emarketer.com/content/demanding-a-better-ad-experience>

Circumventing user preference

61 percent of ad-blocking users in the US said they would be “unlikely” to return to a website which had disabled their ad blocker without their permission.

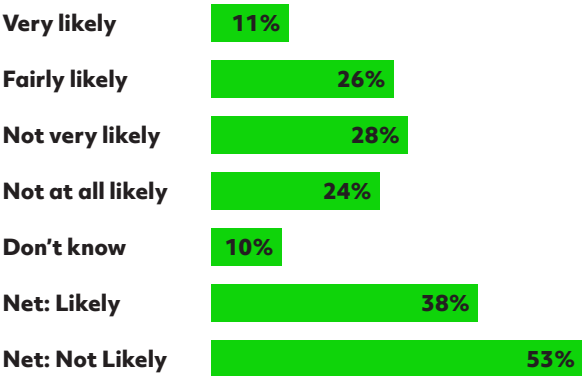
2

The impact of ad blocking on the publishing industry has forced advertisers and publishers to rethink their entire strategy. For many years, these two parties have retained power over the advertisements people see. Now, through the increased use of technology and greater awareness among the populace on issues such as privacy, that balance of power is shifting; and with it has come frustration.

Publishers have looked to counter these frustrations by addressing their ad-blocking readers. We have seen actions ranging from appealing to users to whitelist their website, to blocking access to a site altogether. These tactics have had mixed results which concur with our own findings.

53 percent of polled ad-blocking users in the US would not turn off their ad blocker if asked to by a website.

How likely, if at all, would you be to turn off your ad-blocker software if websites put up a banner asking you to turn your ad-blocker software off?



Research conducted by PageFair supports this, showing **74 percent** of US ad-blocking users would rather leave a website when presented with an “ad blocker wall”, supporting the position this tactic falls short of a solution for most publishers.³

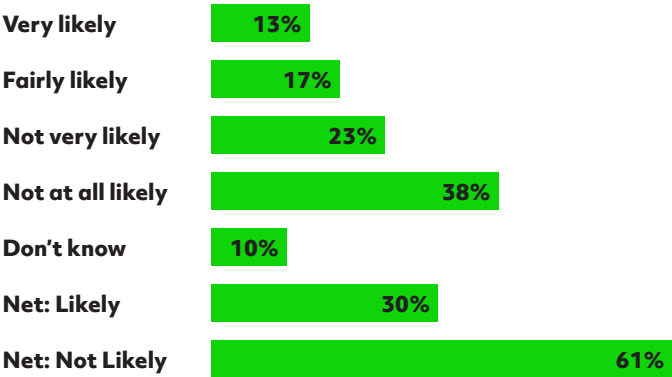
Increasingly, we’re seeing another tactic undermining user preference in its entirety. Publishers are experimenting with anti-ad blocking or what is increasingly becoming known as circumvention technologies. It works by disabling an ad blocker and reinjecting advertisements back onto the user’s screen. While such tactics may appeal to publishers, our study suggests this goes against the desires of the online user.

³ <https://pagefair.com/blog/2017/adblockreport/>

83 percent of polled ad-blocking users in the US would be “annoyed” if a website disabled their ad blocker without their permission.

Critically, **61 percent** of polled ad-blocking users in the US said they would be unlikely to return to a website which had disabled their ad blocker without their permission.

For the following question, please imagine you found out a website you had used was disabling your ad blocker without your permission. How likely, if at all, would you be to visit this website again at any point in the future?



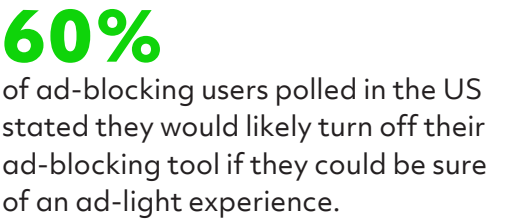
75 percent of polled online users in the US state it is fair to use ad-blocking software when surfing the Internet, compared to just **8 percent** who think otherwise.

These convictions are not isolated to the US. When we surveyed participants in Britain, **78 percent** of British ad-blocking users stated they would not return to a website if their ad blocker was disabled without their permission.

83%
of polled ad-blocking users in the US would be “annoyed” if a website disabled their ad blocker without their permission.

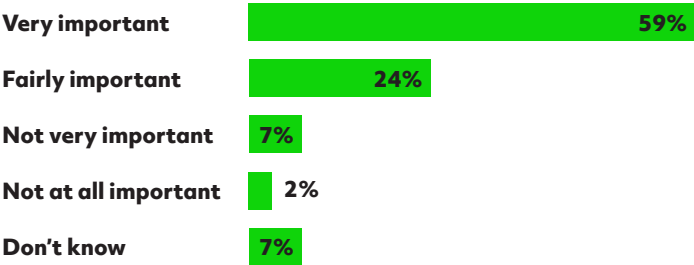


Online users believe it is their right to have control over the ads they see, whether as an ad-light experience or consciously blocking all forms of advertising. **60 percent** of ad-blocking users polled in the US stated they would likely turn off their ad-blocking tool if they could be sure of an ad-light experience. **83 percent** of polled online users in the US also stressed the importance of publishers being clear about their advertising policies, ensuring that any content published is not misleading or does not compromise user privacy. This reinforces the importance of transparency. Online users may distrust a website which disables their ad-blocking software without permission.



12

How important, if at all, do you think it is for online publishers to be clear about their advertising policy (i.e. so that their content does not mislead, offend its audience or compromise their privacy)?



For publishers, experimenting with different solutions to capture lost revenues, the use of circumvention technologies might appear an easy option but, in fact, it appears to create much distrust amongst audiences.

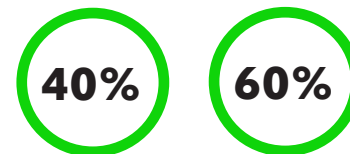
The importance of online advertising - users get it!

57 percent of polled online users in the US would happily filter ads as opposed to total blocking.

13

Many argue that the use of countermeasures, such as circumvention technologies, are critical to sustaining the future of the Internet. The old saying, “nothing comes for free in this world”, might seem fitting. If online users want to receive interesting, compelling, and engaging content, as the argument goes, the trade-off is advertising. This narrative is readily labeled to online users, but do they really understand the role advertising plays in keeping the Internet free? Our research says yes, they do.

Before taking this survey, were you aware that some ad-blocking software have an ad-filtering feature?



Yes, I was No, I was not

Unequivocally so, actually **71 percent** of polled online users in the US stated they do recognize the role advertising plays in keeping content free. We believe this is a contributing factor for why we're seeing a greater shift from total ad-blocking to ad-filtering.

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While ad-blocking began as an all-or-nothing proposition – either you block everything, or you don't have an ad blocker – ad-filtering, whether accomplished through an ad blocker or even directly through the browser, is now widely adopted.

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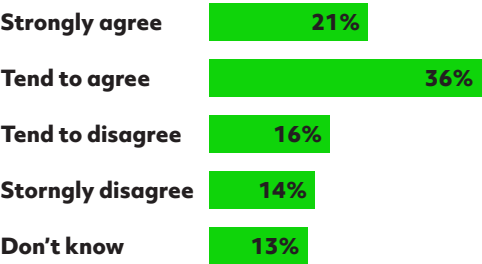
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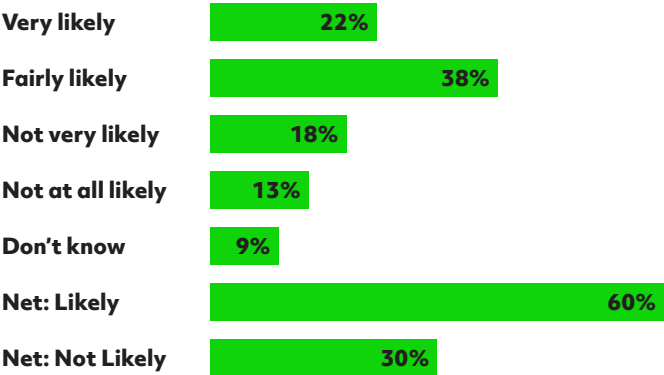
57 percent of polled online users in the US would also happily filter ads as opposed to total blocking. This reinforces that online users are happy to receive ads so long as the ads are light and they remain in control of their Internet experience.

I would prefer to filter ads when browsing the Internet, rather than block them all, so that I can only view ads I want to see.



60 percent of ad-blocking users in the US would turn off their ad-blocking software if they could be sure of an ad-light experience.

How likely, if at all, would you be to turn off your ad-blocker software on any of your devices if you could be sure of an ad-light experience (i.e. that I would only receive minimal ads while online)?



The importance of user control cannot be overstated. Whether it comes to the ads they see or receiving privacy/security assurances from a website they visit, **68 percent** of ad-blocking users polled in the US would turn off their ad-blocking software if they felt a website addressed any concerns relating to privacy or security issues. Online users need to know their preferences are considered and respected. They apparently take exception if a website tries to force their preferences on them, as our data shows.

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However, this willingness to turn off their ad blockers in exchange for better ads and increased privacy and security does not seem to work by direct appeal: only 38 percent of online users polled in the US said they would turn off their ad-blocking software if asked to by a website.

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Additionally, only **47 percent** from the same sample stated they would turn off their ad-blocking software

if a website wouldn't allow them to view the content they came to a site for.

This reinforces how critical it is to have a shared value exchange between publishers, advertisers and online users.

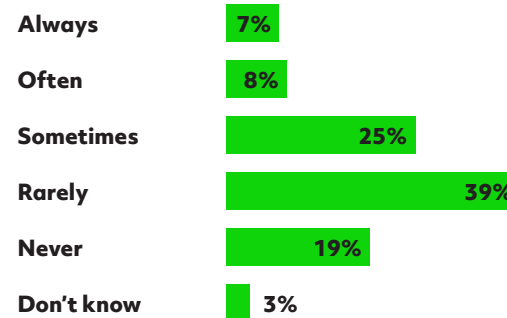
Not only is this backed up in our research, but also in various studies – HubSpot, for instance, revealed **83 percent** of global online users only want to block ads they considered invasive, and PageFair found **77 percent** of US ad-blocking users are willing to view some ad formats in exchange for free content.

Demos: who is blocking and what do they think?

Consider the demographic⁴ of the ad-blocking user. They are younger, educated, tech-savvy, and employed with a higher-than-average salary. They are likely to make purchases online, and in fact, more likely to buy a product online after seeing an ad. Ad-blocking users are also likely to spend more money online on a monthly basis than non-ad-blocking users.

Our research revealed **39 percent** of polled US online users rarely click on ads, with a further 19 percent stating they never click ads.

In general, how often, if at all, would you say you click on an online advertisement (e.g. for a product, a service etc.)?



We saw similar results received in our Britain study. **57 percent** of polled British online users rarely click on ads, with a further **27 percent** stating they never click ads. These collective findings show the importance of this segment to the future of online advertising. The answer seems obvious when presented with these findings (even if implementing this in the existing ad-tech infrastructure is an understandably difficult task) - developing better, high-quality forms of sustainable advertising.

Building better ads for tomorrow

45 percent of polled US online users expect invasive forms of advertising to still exist in 10 years' time and, therefore, the use of ad blockers will likely persist.

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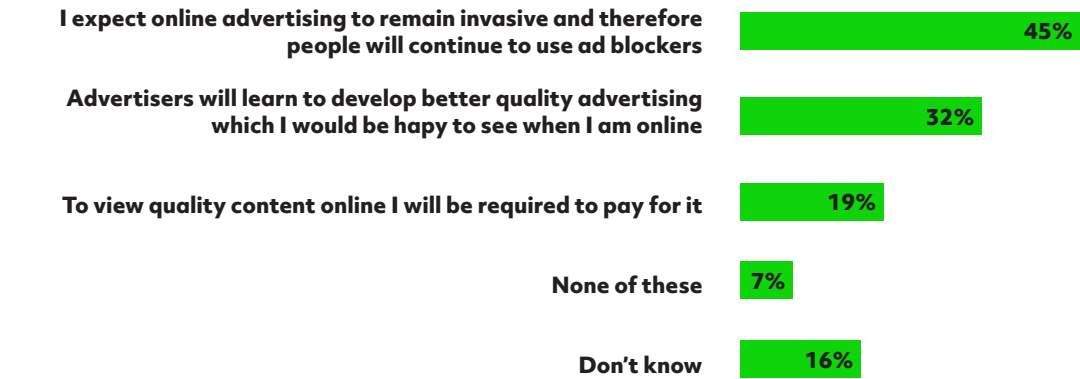
Online advertising plays a critical role within the digital ecosystem, and will only grow as Internet penetration increases globally. Notably, 2019 will become a landmark year in the world of advertising. For the first time, digital ad spending in the US will exceed traditional ad spending, according to eMarketer's latest forecast. By 2023, digital will exceed two-thirds of total media spending⁵.

⁵ <https://www.emarketer.com/content/us-digital-ad-spending-will-surpass-traditional-in-2019>

Looking ahead, participants were asked to think about how the digital advertising industry might look in 10 years' time.

Thinking about the future of online advertising (i.e. in the next 10 years), which, if any, of the following statements do you agree with?

18



Almost half (**45 percent**) of polled US online users expect invasive forms of advertising to persist. If over half of all respondents (with and without ad blockers) feel that invasive formats will continue – percentage that outstrips the highest estimates for the percentage of ad blockers living in the US – the corollary here is of course that ad blocking will remain popular.

32 percent of polled US online users believe advertisers will learn to develop better quality advertising, which users are happy to see.

Interestingly, these results align with similar trends seen in Great Britain, although there appears to be slightly less optimism on the other side of the Atlantic. Our previous study revealed that **53 percent of polled British online users** expected advertising to remain invasive looking 10 years ahead.

When you consider overall digital ad spend in the UK is expected to increase 10 percent from the previous year⁶ and grow by 19 percent in the US to \$129.34bn⁷, the importance of respecting and engaging with online users on a global scale is clear.

6 <https://www.emarketer.com/content/uk-digital-ad-spending-by-industry-2018>

7 <https://www.emarketer.com/content/us-digital-ad-spending-will-surpass-traditional-in-2019>

77 percent of polled 18-24-year old online users in the US understand the importance of advertising to a free internet. **48 percent** of polled 18-24-year old online users in the US also stated they would prefer to filter ads as opposed to total blocking. This figure is below the total average from the sample (**59 percent**), suggesting much trust is still to be built with future generations. This is a demographic which has grown up with the means to govern their online experience. If they feel they are having unwanted ads pushed onto them, they may also respond without compromise.

••

77 percent of 18-24-year olds understand advertising's importance and 45 percent say they'd prefer to filter ads as opposed to blocking them all.

••

48%

of polled 18-24-year old online users in the US also stated they would prefer to filter ads opposed to total blocking.



Time for change

21

There is a misconception that ad-blocking software has blocked out an entire segment of website traffic. The truth is that the vast majority of this second segment is reachable, so long as the reaching is done on their own terms. The reason is that ad-blocking software has become increasingly ingrained and respectful of the digital ecosystem, allowing online users to view ads they want, while filtering out those they consider invasive.

Hundreds of millions of people who use ad-blocking extensions are now shown consent-based ads each year. For instance, over half of ComScore's top-50 most visited desktop websites contain more respectable forms of advertising tailor-made for

users of ad-blocking technology; and this is virtually mirrored across Alexa's top 50⁸.

As previously stated, most will keep those extensions on. But is this such bad news when this second segment is now attainable?

While ad-blocking software has remained in heavy use, some of the reasons for hitting download have moved beyond feelings of ad invasiveness. Our research showed that when asked why they used an ad blocker, **57 percent** of ad-blocking users polled said they didn't want to see ads when online. The second highest response (**52 percent**) said their use was due to privacy or security concerns.

⁸ <https://eyeo.com/2018-ad-blocking-report/>

Scandals such as Cambridge Analytica created a huge 'techlash' against brands like Facebook, resulting in online users becoming increasingly wary regarding how organizations use their data. Ad blockers are seen as an accompaniment to a person's online defense. 68 percent of online users in the US with ad-blocking software installed on their devices said they would turn off their ad blocker if security and privacy concerns were met.

As ad-filtering becomes more commonplace, a better strategy is needed to make users part of the bargain. As we've seen from the evidence above, and elsewhere, the framework is in place to build better

forms of advertising. Doing so will create a more sustained and secure future for the Internet and its stakeholders.

Conclusion

23

The social attitudes displayed in this study toward advertising and ad blocking have shown a mature understanding from online users towards the digital ecosystem. Far from seeking to banish ads entirely, **71 percent** of polled US online users state they understand publishers rely on advertising to keep their content free.

These findings shatter preconceptions that those who turn to ad-blocking software have no regard for publishers' revenues. Instead, our research indicates internet users would be willing to accept less invasive forms of advertising in return for being given greater control of both the quantity and quality of ads they see.

These findings merely support what is already true: publishers can reach this second segment as long as the 70 million Americans who compose it are left in control. Transparency is key. As advertising spend continues to increase, the framework is in place to build on demand for better forms of advertising.

As we have seen, there are already a number of successful initiatives that provide a balance for users wanting greater influence over their Internet experience and publishers who need to monetize. Ad-filtering users react negatively towards circumvention technologies; on the other hand, 'consent-based' forms of advertising are already working on at least half of the major websites in the world for ad-filtering users.

As publishers and advertisers grow to accept content-filtering (including ad blocking, ad-filtering, tracking protection, etc.) as a key component of a user's online profile, we are arguably closer than ever to finding common middle ground to appease all parties. But there is still much to do. Whether the hurdles remaining are political, technical or related to a patchwork of competing solutions, they are undeniably there. The good news is it seems we can jump over them together.

Want to learn more?

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