



REINVENTING VIDEO ADVERTISING

Why People Block Ads

January, 2016
London, UK



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Methodology & Sampling

Methodology

Research objective:

Obtain a greater understanding of ad blocker adoption via active users of blockers and those who are aware of ad blockers but have not yet installed. This includes adoption by device, browser, blocker type, motivations to install and potential solutions.

Dates in field:

November 20 –
November 30, 2015

Market:

United
Kingdom

Measurement methodology:

Online survey, self-reported

Primary segments:

Active ad blockers in desktop, Active ad blockers on mobile (smartphones/tablets), Aware of blockers but have not yet installed

Sample:

N=1,000 with soft quotas to ensure a natural fallout within segments; Hard quotas around adoption on mobile, desktop, and overall awareness

N=494: Don't have ad blockers installed but are aware

N=342: Installed on a desktop/laptop device

N=288: Installed on a mobile device

Screening Criteria: A18+, Internet Connection, Not employed in relevant industries

Key Takeaways

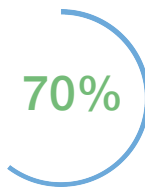


1. Intrusive ad formats motivate ad blocker adoption



Over 3 in 4 people say that intrusive ads were the largest motivator for installing ad blockers

2. Forced ad formats encourage ad blocker use



70% perceive forced ad formats as the most intrusive

3. Pre-roll is the most intrusive video format

52% of people who have ad blockers installed rate pre-roll as the most intrusive video format (vs. 24% for native video)



4. Giving users choice to view an ad reduces motivation to block ads



79% of people would reconsider installing ad blockers if the ad experience provided them with choice

Introducing the respondents

An overview of the total sample



51%
are males 18+



40%
have kids

25%
are millennials 18 - 34

35%
are from southern
England

30%
Earn £50k plus in HH

75%

are university
educated and
above



Potential adopters

Overview of sample

Users aware of ad blockers but haven't installed



Demographics

HHI 50K+	33%
Male	46%
College Educated +	77%
Millennials A18-34	45%



Device usage

iPhone	48%
iPad	43%
Android Phone	34%
Android Tablet	28%
Desktop	43%
Laptop	72%

The sample of blocker adopters by device



Have installed blocker on a mobile device

Demographics

HHI 50K+	30%
Male	50%
College Educated +	74%
Millennials A18-34	35%

Device usage

iPhone	54%
iPad	49%
Android Phone	36%
Android Tablet	31%



Have installed blocker on a desktop/laptop

Demographics

HHI 50K+	26%
Male	61%
College Educated +	77%
Millennials A18-34	20%

Device usage

Desktop	61%
Laptop	81%

Meet the Adopters

A snapshot of mobile blocker users



Source: Teads Research, "Profile of an Ad Blocker,"
Fielding by Research Now, Analysis by Teads,
November 2015. Base: Those who have installed on
a mobile device. Sample: n=591

Have installed blockers on a mobile device

70%

are *less likely* to return to a website with intrusive ads



90%

are *more likely* to have blockers installed on Safari vs. those who have installed desktop blockers

49%

heard about ad blocking *from peers*

74%

find *forced* advertising the most annoying

65%

are *more likely* to be concerned with privacy vs. blockers on desktop

35%

are *more likely* to have children than blockers on desktop

...and on desktop/laptop



Source: Teads Research, "Profile of an Ad Blocker,"
Fielding by Research Now, Analysis by Teads,
November 2015. Base: Those who have installed on a
desktop/laptop. Sample: n=701

Have installed blockers on Desktop/laptop

82% found the ads to be interruptive or annoying

46% would consider whitelisting certain sites if they deemed them valuable

31% more likely to be male than non blockers

93%
have installed ad blockers to remove pop up and forced advertising

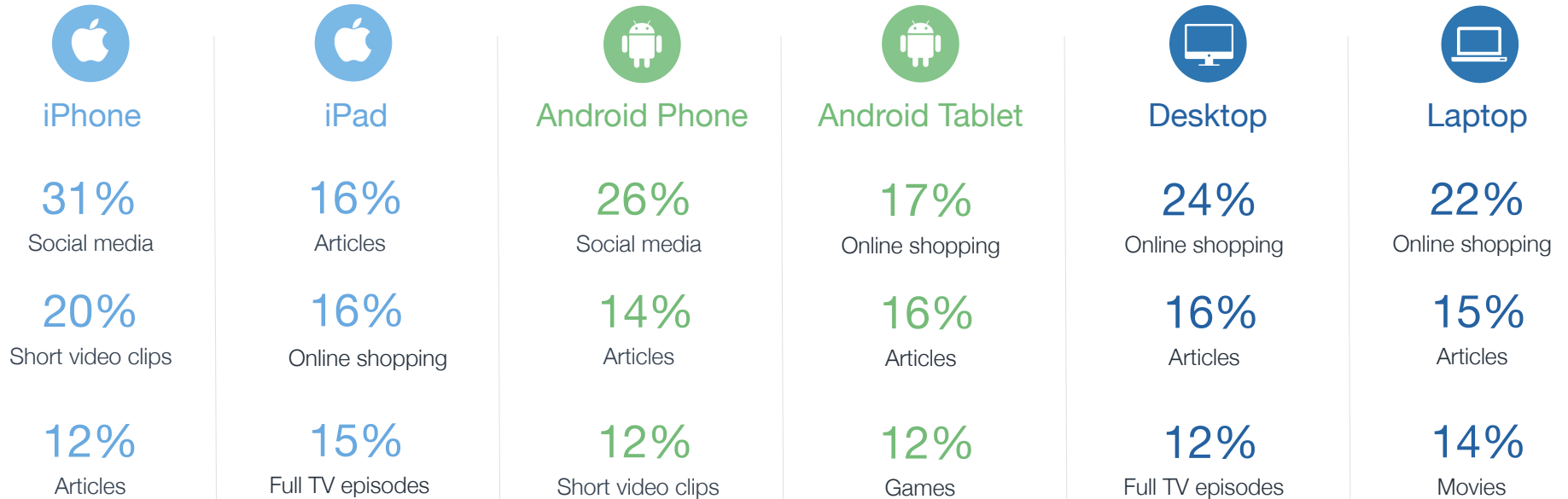
25%
more likely than mobile blockers to have heard about blockers via word of mouth

24%
more likely to have graduated university than mobile blockers

Adoption & Awareness

Articles most frequently consumed

Most frequently-consumed content across devices



Q: Which type of content do you consume the most on your device?

Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015, iPhone n=461, iPad n=429, Android Phone n=377, Android Tablet n=306, Desktop n=465, Laptop n=710

Intrusive advertising affects browsing behavior

When asked if intrusive ads have made the respondent less likely to return to a site
3 in 4 desktop ad blocker users agreed



Ad blocker users
on a mobile device

70%

are less likely
to return



Ad blocker users on a
desktop/laptop device

62%

are less likely
to return



Those aware of but
don't use ad blockers

49%

are less likely
to return

Q: Have digital ads that you found annoying, excessive, or intrusive ever made you less likely to return to a website?

Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015. Sample: Desktop: n=342, Mobile n=288, Aware but not installed: n=494

Peers drive ad-blocker awareness



Have installed blockers on
mobile device

Find out from ad blockers from peers

49%

34%

Word of mouth

15%

Social media



Have installed blockers on
desktop/laptop

Find out from ad blockers from peers

53%

43%

Word of mouth

10%

Social media



Are aware of ad blockers but
haven't installed

Find out from ad blockers from peers

40%

35%

Word of mouth

6%

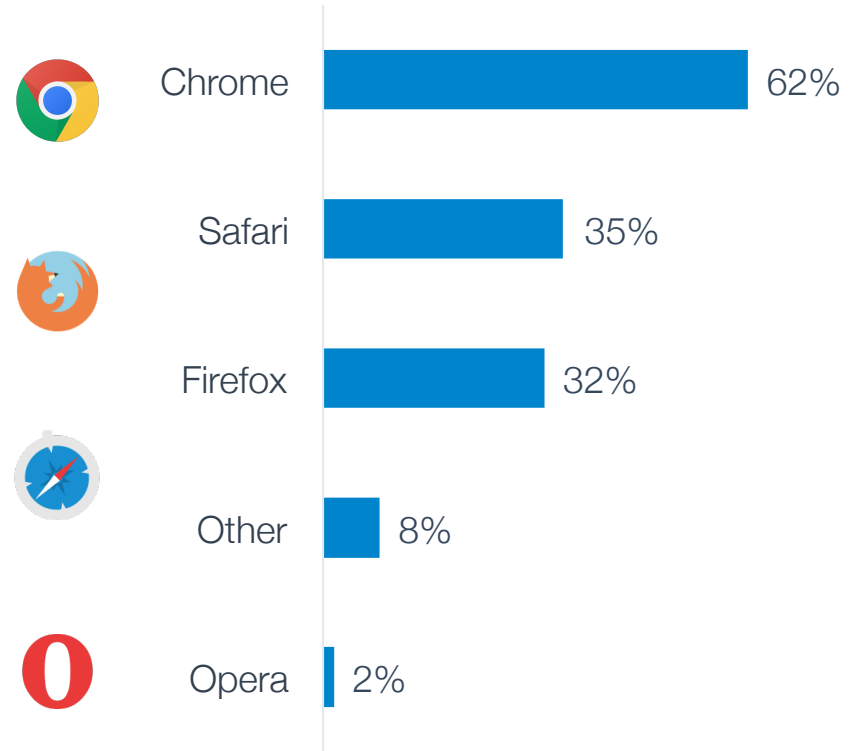
Social media

Q: From where did you first hear about ad blockers?

Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015, Find out from peers = word of mouth + social media.
Sample: Desktop: n=342, Mobile n=288, Aware but not installed: n=494

Highest proportion of ad blocking happens on Chrome

Total % adoption for those who have installed
ad blockers on any device
(Those who have blockers installed)



Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015. Base: Those who have ad blockers on device. N=506

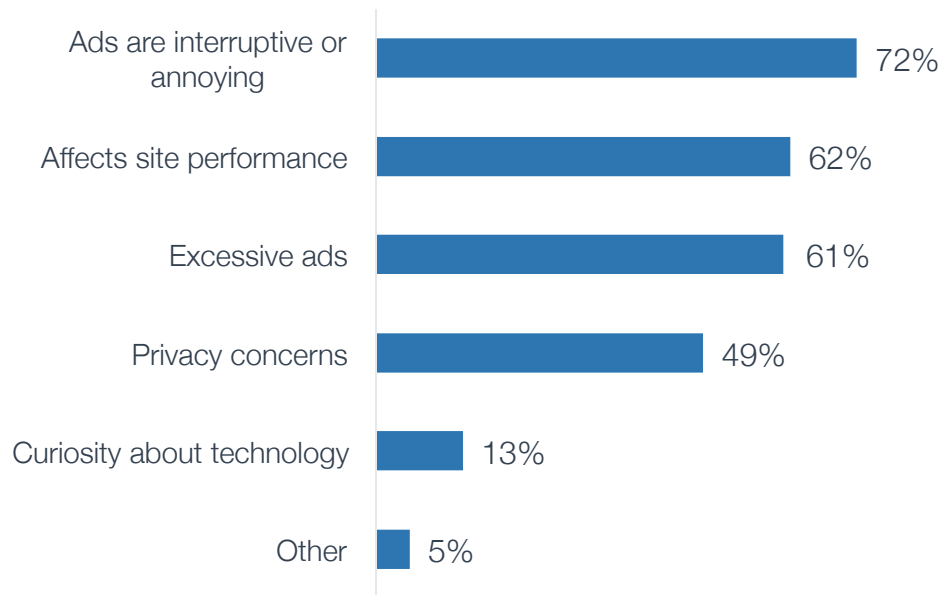
Drivers of Blocker Adoption

Intrusive advertising largest motivator to install blockers



Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015. Base: Those who have ad blockers on device. N=506

Motivations to install (Have installed on any device)



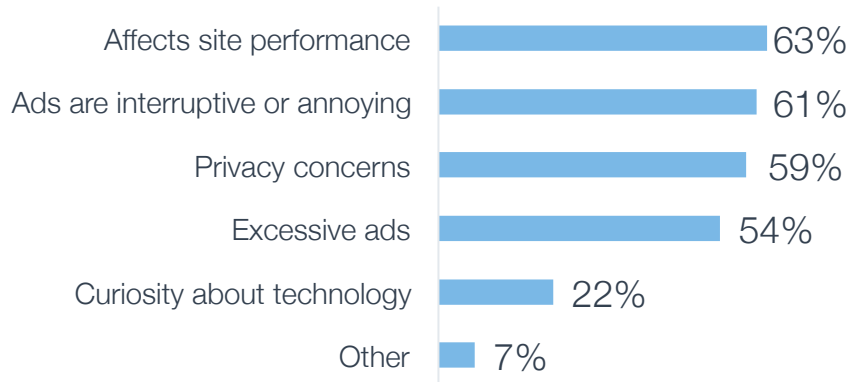
Q: Which of the following reasons motivated you to install ad blockers on your device?

Motivations for installing blockers on a smartphone

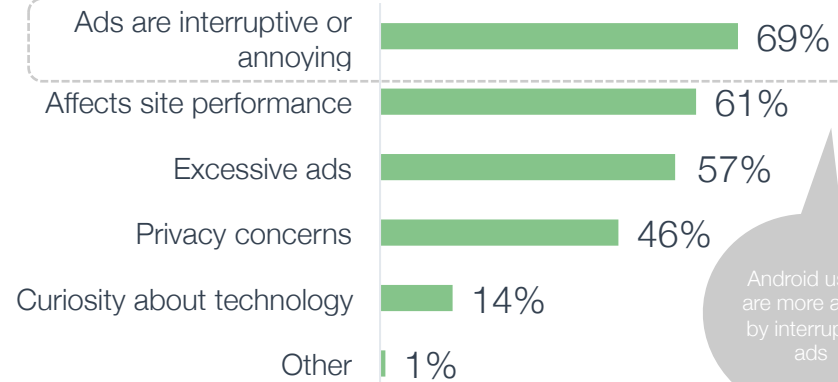
Motivations to install



Have installed on iPhone



Have installed on Android Phone



Android users are more affect by interruptive ads

Q: Which of the following reasons motivated you to install ad blockers on your device?

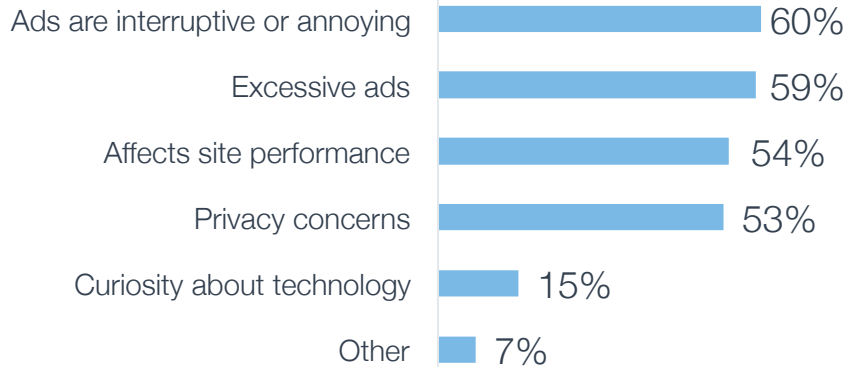
Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015. Base: Those who have ad blockers on device. Sample: iPhone n=116, Android Phone: n=72*

Motivations for installing blockers on a **tablet**

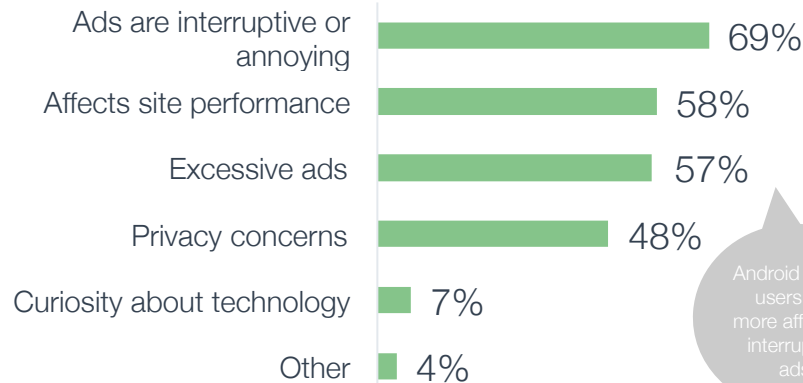
Motivations to install



Have installed on iPad



Have installed on Android Tablet



Android Tablet users are more affect by interruptive ads

Q: Which of the following reasons motivated you to install ad blockers on your device?

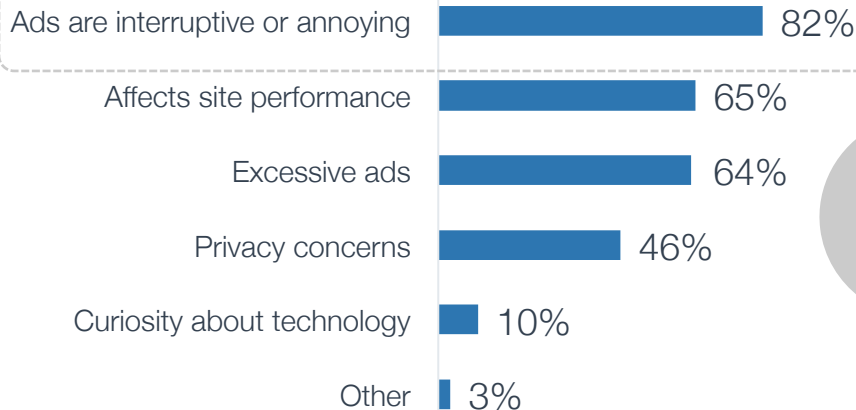
Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015. Base: Those who have ad blockers on device. Sample: iPad n=108, Android Tablet: n=69*

Motivations for installing blockers on a **computer**

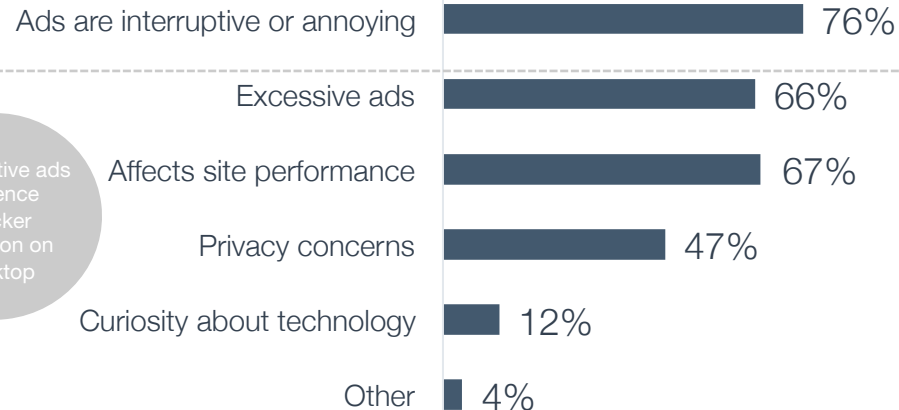
Motivations to install



Have installed on desktop



Have installed on laptop



Interruptive ads influence blocker adoption on desktop

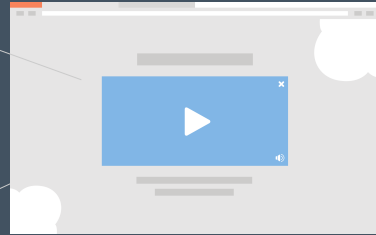
Q: Which of the following reasons motivated you to install ad blockers on your device?

Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015. Base: Those who have ad blockers on device. Sample: Desktop n=180, Laptop: n=249

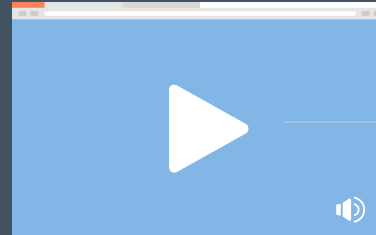
Forced formats drive adoption on desktop/laptop

When asked to rank formats by intrusiveness, respondents most frequently ranked large, forced ads as the most intrusive

55%
Forced video



15%
Forced audio



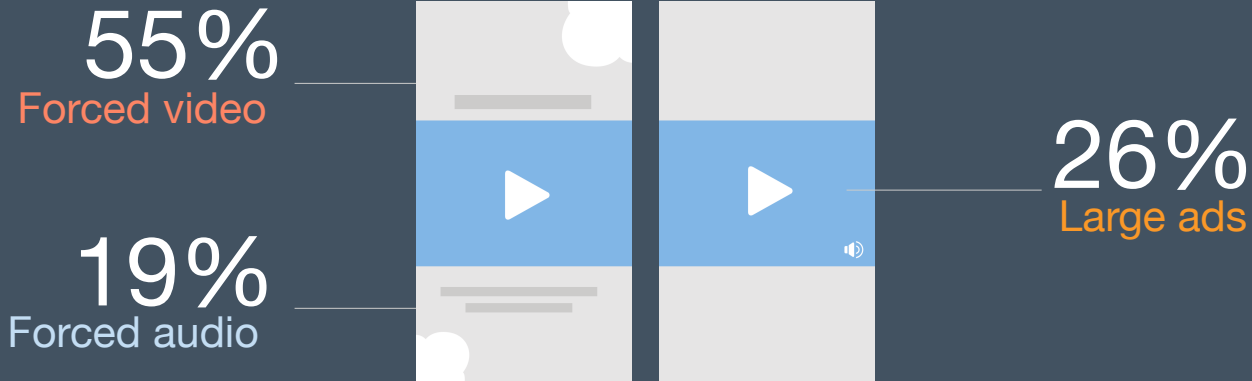
30%
Large ads

Q: Please order the following features from being the most likely to motivate you to install ad blockers to the least likely. #1

Source: Teads Research, "Profile of an Ad Blocker," fielding by Research Now, analysis by Teads, November 2015. Base: those who are aware of but have not yet installed ad blockers.
Sample: Video ads that cover entire screen n=103, Unskippable video n=79, Auto-play audio n=31, Video ads that remain on the screen upon scrolling n=73, Video interstitial n=37.

...and on mobile as well

Mobile blocker adopters are more likely to be motivated to install blockers due to forced audio than on desktop



Q: Please order the following features from being the most likely to motivate you to install ad blockers to the least likely. #1

Source: Teads Research, "Profile of an Ad Blocker," fielding by Research Now, analysis by Teads, November 2015. Base: those who are aware of but have not yet installed ad blockers. Video ads that cover entire screen n=76, Unskippable video n=62, Auto-play audio n=31, Video ads that remain on the screen upon scrolling n=59, Video interstitial n=36.

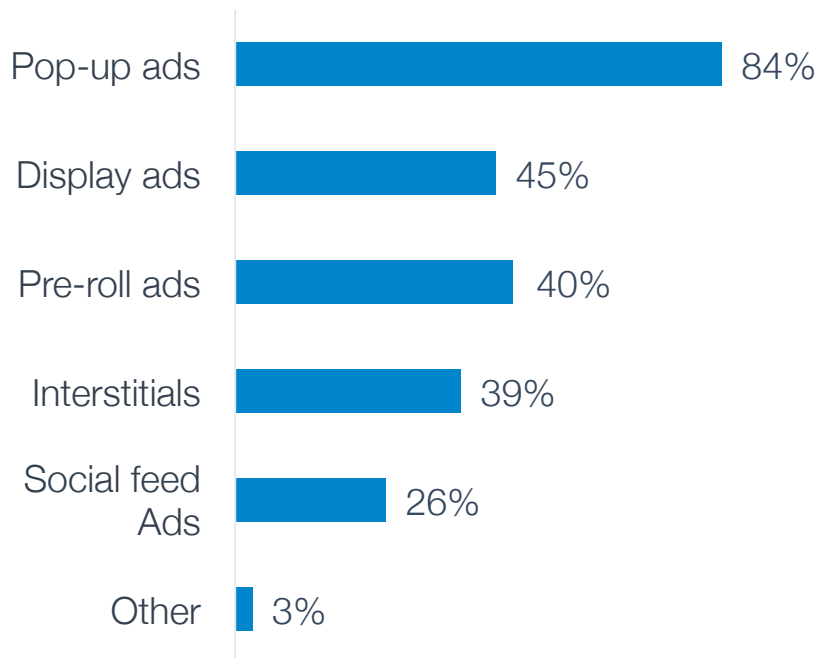
Ad Formats' Impact on Adoption

Pop-up ads largest driver of ad blocker adoption



Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015. Base: Those who have ad blockers on device. N=506

Ad formats that influenced ad blocker
adopters to install
(Have installed on any device)



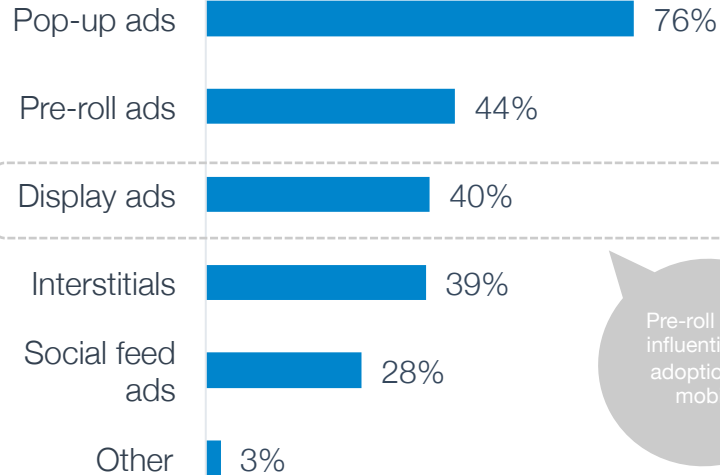
Q: Which types of ads do you currently use your ad blocker to remove?

Pop-ups more influential for adoption on desktop



Mobile device ad blockers

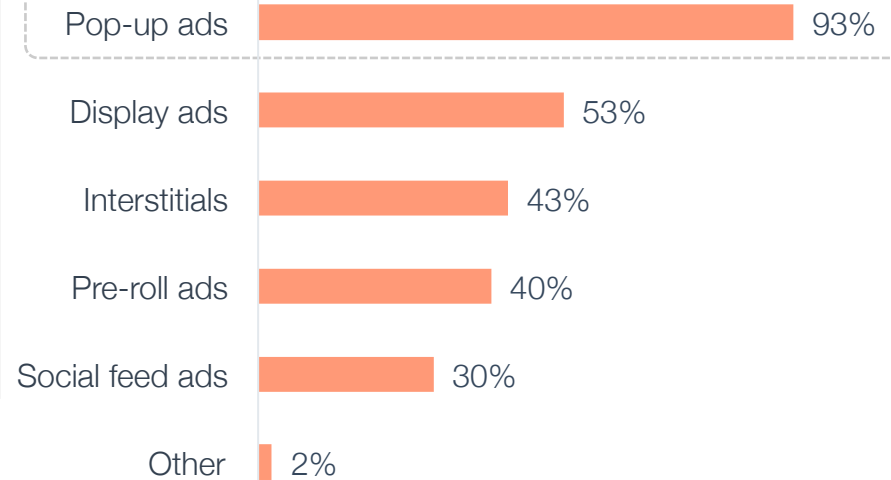
Ad formats that influenced ad blocker installation



Pre-roll more influential for adoption on mobile

Desktop/laptop ad blockers

Primary motive for installing ad blocker



Q: : Which types of ads do you currently use your ad blocker to remove?

Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015, Base: those who have installed blockers by device. Sample: Any Device: n=1,003, Desktop: n=342, Mobile n=288.

Native video formats perceived as less intrusive

% of respondents who ranked formats as most intrusive of those given



Have installed blockers on mobile device

48%

Pre-roll

23%

In-article native*
video

Have installed blockers on desktop/laptop



52%

Pre-roll

24%

In-article native*
video

Q: Please order ad formats below from most intrusive to least intrusive.

Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015, Base: those who have installed blockers by device. Sample: Any Device: n=1,003, Desktop: n=588, Mobile n=450. *In-article native video are formats that appear between the text of an article.

Mobile ads perceived to be more intrusive

% of respondents who find ad formats on mobile more intrusive



Have installed blockers
on a mobile device

71%



Have installed blockers on a
desktop/laptop

58%



Are aware of ad blockers
but haven't installed

59%

Q: To what extent do you agree with the following statement: 'I find advertising on a mobile device to be more intrusive or annoying than on my desktop device?'

Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015. Sample: Desktop: n=342, Mobile n=288, Aware but not installed: 494

What Users Want

Users would consider whitelisting a site they value

% of respondents who would whitelist a site they find valuable



Have installed blockers
on a mobile device

58%



Have installed blockers on a
desktop/laptop

46%



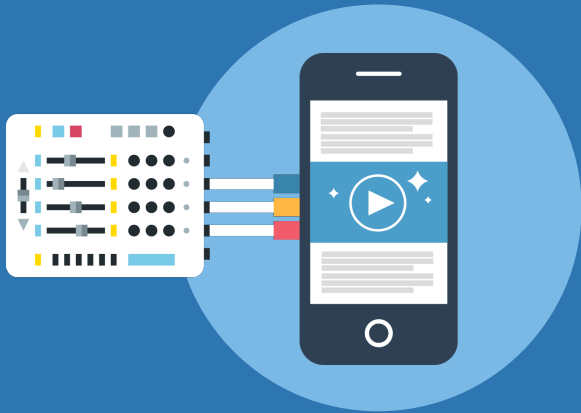
Are aware of ad blockers
but haven't installed

53%

Q: Please indicate how strongly you agree with the following statement, 'I would consider whitelisting or unblocking ads from certain sites if they were valuable to me'.

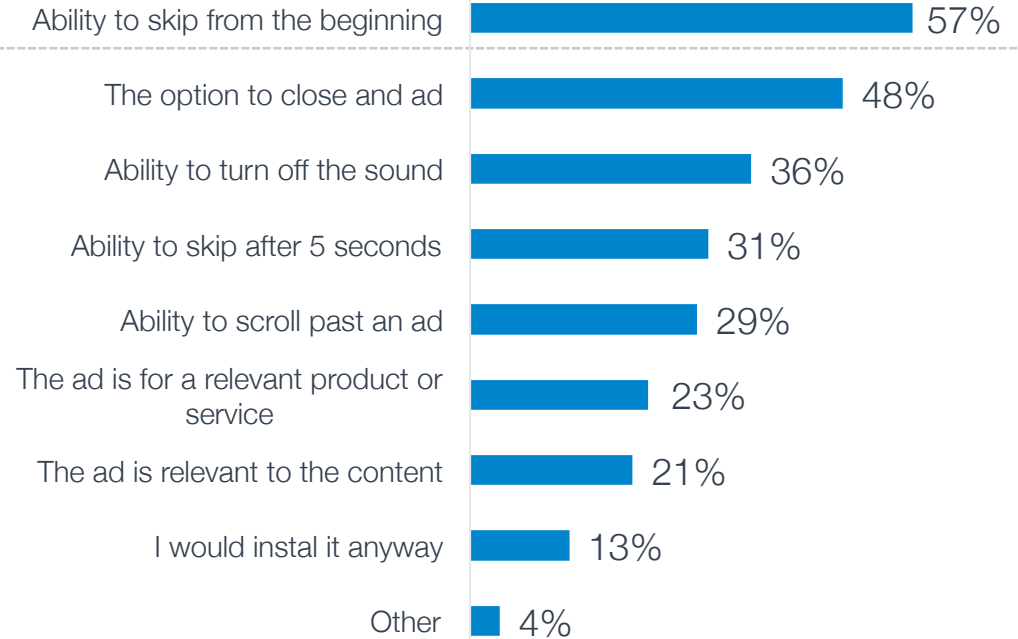
Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015. Sample: Desktop: n=342, Mobile n=288, Aware but not installed: n=494. Top-two box.

User choice is the solution to preventing blocker adoption



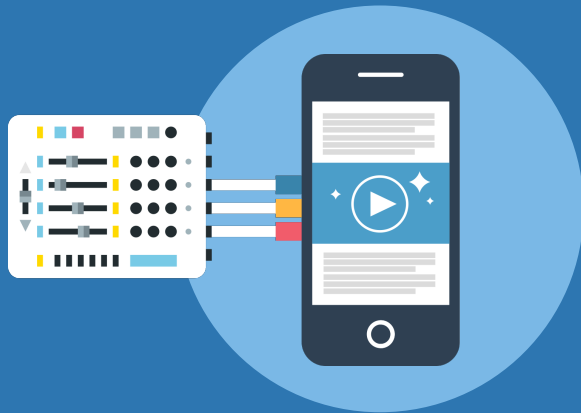
Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015. Base: Those who are considering installing ad blockers on device. N=551

Features that may motivate those considering adoption to avoid installing ad blockers (Considering installing blockers on any device)



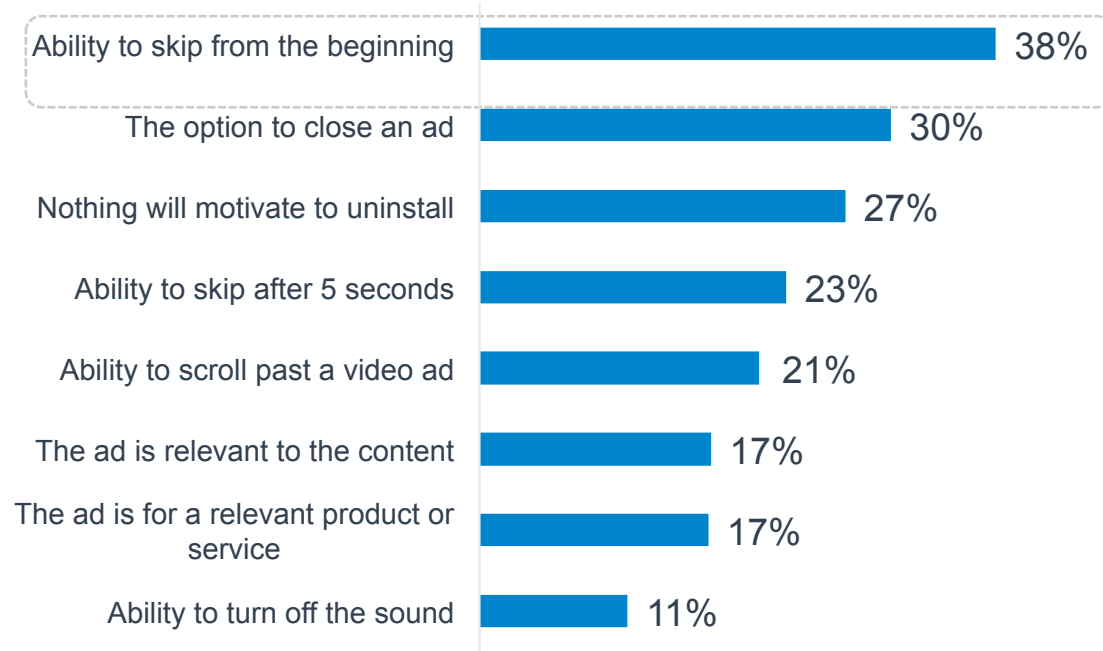
Q: Which of the following features of an online ad, if any, would make you to consider not installing an ad blocker?

...and giving users choice can reduce adoption



Features that may prevent users from not installing blockers

(Those considering installing ad blockers)

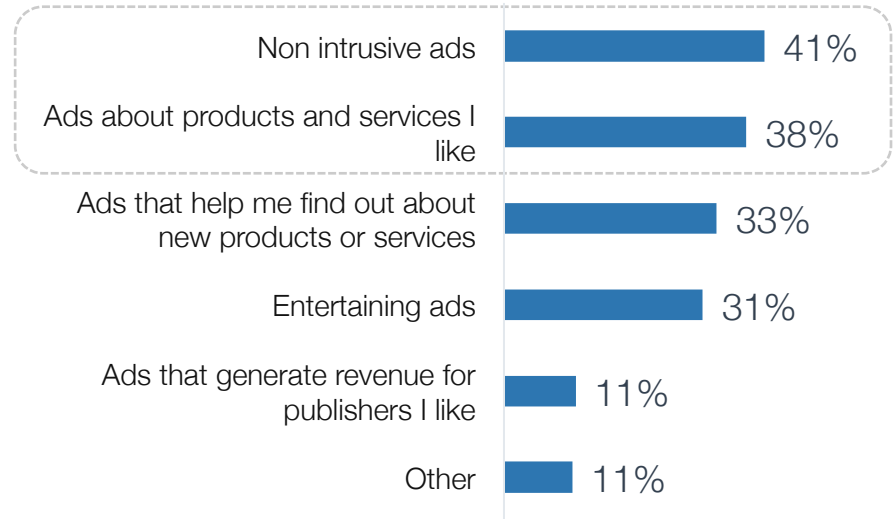


Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015. Base: Those who have ad blockers on device. N=506

Q: Which of the following features of an online ad, if any, would make you consider uninstalling an ad blocker?

Ads should be non-intrusive and targeted

Reasons users have for seeing at least some ads (Total respondents)



Source: Teads Research, "Profile of an Ad Blocker," Fielding by Research Now, Analysis by Teads, November 2015. Aggregated response by device not taking into account duplication. Base: Total ad blocker users. N=1,000

Q: Which of the following reasons below would motivate you to see some online advertising?

Recommendations for creating an optimal ad experience

1. Integrate advertising formats which create a seamless user experience
2. Leverage features that give users control of the ad experience through choice
3. Limit the use of advertising formats that are considered intrusive such as pre-roll
4. Create formats which are built specifically for mobile to improve users' perception of mobile advertising
5. Strategically use targeting to ensure ads are relevant to the user

Appendix

Additional Findings Worth Considering

58%

More likely to uninstall ad blockers if they are provided the opportunity to scroll past an ad whilst consuming content

37%

Installed an ad blocker through word of mouth influence, with 22% being inspired by online news, creating a dangerous 'copy cat culture'.