

# The US

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# Ad Blocking

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# Usage

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# Report 2019

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**Know your ad-blocking audience**





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# Looking ahead

57%

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

71%

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

39%

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

83%

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

61%

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

45%

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

32%

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

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

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



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



They would unlikely turn off their ad-blocking software if a website wouldn't allow them to view the content they wanted, without turning off their ad-blocker.



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

# Reaching the tipping point

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

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 advert in a newspaper or magazine?' It's largely because of this 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.<sup>1</sup>

The ad-blocking phenomenon grew because people no longer wanted adverts disrupting their online experience. This includes adverts 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.

Despite ad-blocking adoption being strong in the US, online users in general are not oblivious to the role

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

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.

The hope is as ads become less invasive, the demand for total ad-blocking solutions will decrease, creating a balanced digital world where content and ads coexist, and publishers are able to sustain their business models. 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.

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

In April 2019, YouGov conducted market research on behalf of eyeo, the parent-company of Adblock Plus, Trusted News and Flattr, 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

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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 **1,382** of participants<sup>2</sup> registered as having an ad-blocker installed on their digital devices.

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**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 'unlikely' return to a website which had disabled their ad-blocker without their permission.**

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. 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.<sup>3</sup>

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

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

our study suggests this goes against the desires of the online user.

**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 unlikely return to a website which had disabled their ad-blocker without their permission. **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.

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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.

Online users believe it is their right to have control over the adverts 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 in 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.

For publishers, experimenting with different solutions to capture lost revenues, the use of circumvention technologies might look 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

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, the argument goes, the trade-off is advertising. This narrative is readily labeled at online users, but do they really understand the role advertising plays in keeping the internet free? Our research says, yes, they do.

Unequivocally so, actually: **71 percent** of polled online users in the US stated they do recognise 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. 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.

**40 percent** of polled online users are aware that some ad-blocking software has an ad-filtering feature. 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 adverts so long as they remain in control of their internet experience. **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.

The importance of user control cannot be overstated. Whether it comes to the adverts 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.

Only **47 percent** of online users polled in the US said 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. Additionally, only **38 percent** from the same sample said they would turn off their ad-blocking software if asked to by a website.

This reinforces how critical it is to have a shared value exchange between publishers advertisers and online users. Online users welcome respect shown to them from the other two parties but take action when publishers are more heavy-handed in their tactics. They often resent it, even.

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 wanted 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.

We understand the plight facing publishers who need advertising to sustain their business model but the chosen solution for that seems to be the crux of the issue – and according to our own investigation and wider research, the 'forceful' way does not appear the wisest.

Consider the demographic (4) 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 adverts, with a further **19 percent** stating they never click adverts.

We saw similar results received in our Britain study. **57 percent** of polled British online users rarely click on adverts, with a further **27 percent** stating they never click adverts. These collective findings show the importance of this community 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 adverts for tomorrow

**45 percent of polled US online users expect invasive forms of advertising to still exist in 10 years' time, and therefore use of ad-blockers is likely to remain.**

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 spending.<sup>5</sup>

It is imperative, as publishers start to experiment with new technology workarounds, allowing previous blocked ads to be re-injected, that the voice of the online user is not lost. They want to be part of a fairer value exchange but there are concerns amongst next-gen users, to whether they will be heard.

Looking ahead, participants were asked to think about how the digital advertising industry might look

in 10 years' time. Almost half (**45 percent**) of polled US online users expect invasive forms of advertising to still exist and therefore use of ad-blockers is likely to remain.

**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 more 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

year<sup>6</sup> and grow by **19 percent** in the US to \$129.34bn<sup>7</sup> the importance of respecting and engaging with online users on a global scale is there to see.

**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 adverts 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 adverts pushed onto them they don't want to see, they may also respond without compromise.

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

**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>

# Time for change

There is a misconception that ad-blocking software remains inflexible and uncompromising, blocking all types of adverts at great cost to publishers. This is not the case. Ad-blocking software has become increasingly ingrained and respectful of the digital ecosystem, allowing online users to view adverts they want, while filtering out those they consider invasive.

Hundreds of millions of ad-blocking users are now shown consent-based adverts each year. For instance, over half of ComScore's top-50 most visited desktop websites contain more respectable forms of advertising tailor-made for ad blockers; and this is mirrored across Alexa's top 50.<sup>8</sup>

For online users, it's all about transparency. Online users are willing to engage with websites that are respectful of their desire for control and are more likely to meet advertisers and publishers in the middle - as previously stated **60 percent** of US online users with ad-blocking software would turn off an ad-blocker in exchange for an ad-light experience. When advertisers and publishers encroach on online user preferences, this is where friction occurs.

Our research showed that – when asked the reason why US ad-blocking users had downloaded an ad-blocker – **57 percent** of those polled said they didn't want to see adverts when online. The second

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

highest response (**52 percent**) said their use was due to privacy or security concerns.

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. A means of letting them see the adverts they want to see while blocking the ones they don't. **68 percent** of online users in the US with ad-blocking software installed on their devices would turn off their ad-blocker if security and privacy concerns were met.

It's critical this is understood by advertisers and publishers alike. 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

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The social attitudes displayed in this study toward advertising and ad-blocking has shown a mature understanding from online users towards the digital ecosystem compared against what has historically been depicted.

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-blockers have no regard for publishers' revenues. Instead – and encouragingly for advertisers – 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 adverts they see.

In light of these findings, publishers who pursue responsible advertising could have an opportunity to reach previously excluded audiences. Transparency is key. As advertising spend continues to increase, the framework is in place to build on demand for better forms of advertising, creating a more sustained future for the internet and its stakeholders.

As we have seen, there are a number of successful initiatives that reach a balance for users wanting greater influence over their internet experience, while

equally wanting to contribute to a better value exchange with publishers. Online 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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