

# INSIGHTS 2018

AudienceProject >=

Attitude towards advertising  
and use of ad blocking

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US  
UK  
Germany  
Denmark  
Sweden  
Norway  
Finland

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# EDITORIAL

## Mobile ad blocking now on the rise

Ad annoyance continues to be a big problem, and context does not seem to be the answer

In our previous ad blocking studies, mobile has been the positive story. Even though ad blocking was fast rising on computers, mobiles were left almost untouched. Now ad blocking is gaining ground on mobile with Germany's 13% of blocked mobile sessions as the absolute front-runner. This happening at a point, where mobile has more time spent than any other device.

When we look at the reasons for ad blocking, irrelevant ads and ads disrupting the general online experience are highlighted. And when looking at the general opinion towards advertising, it aligns well with the use of blockers. We are seeing that it is not so much about which context an ad is placed within, rather it is irrelevance of ads, which gives the viewer a negative brand perception.

Up to 61% of people have a general disliking of website ads, and for video ads, it is even worse. When asked if placement together with relevant content will improve or worsen the brand perception, there is a very high correlation to whether the user generally feels positive or negative about digital advertising. So, what advertisers need to focus on is improving the general ad experience as well as making sure that the right creatives reach the right people.

### **Rune Werliin**

VP, Marketing & Professional Services @ AudienceProject

*This study is based on more than 16.000 individual survey respondents across 7 countries.*

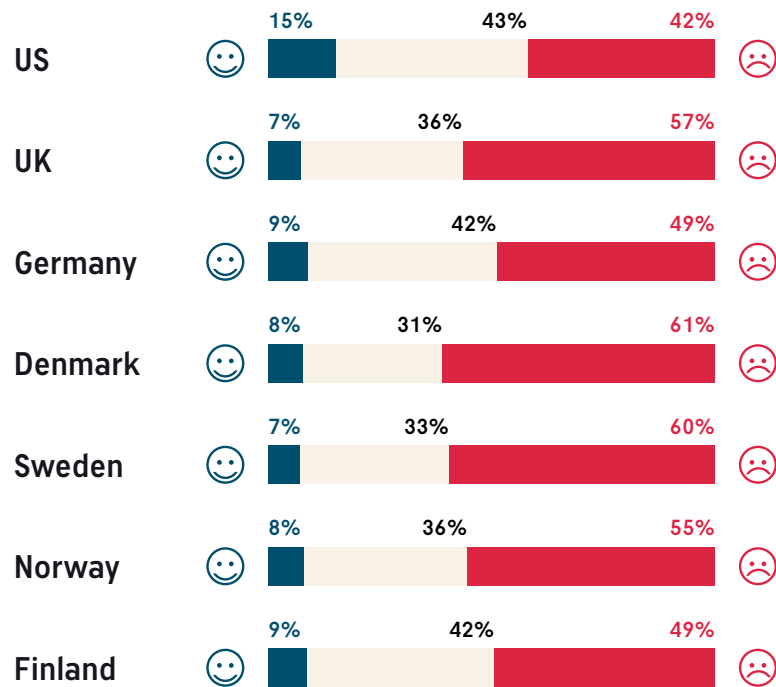
# ATTITUDE TOWARDS ADVERTISING

Let's face it. People don't like ads. And especially, they don't like ads in online video clips. Furthermore, advertisers are challenged by the fact that peoples' brand perception is very negatively affected if ads are shown in non-brand safe environments.

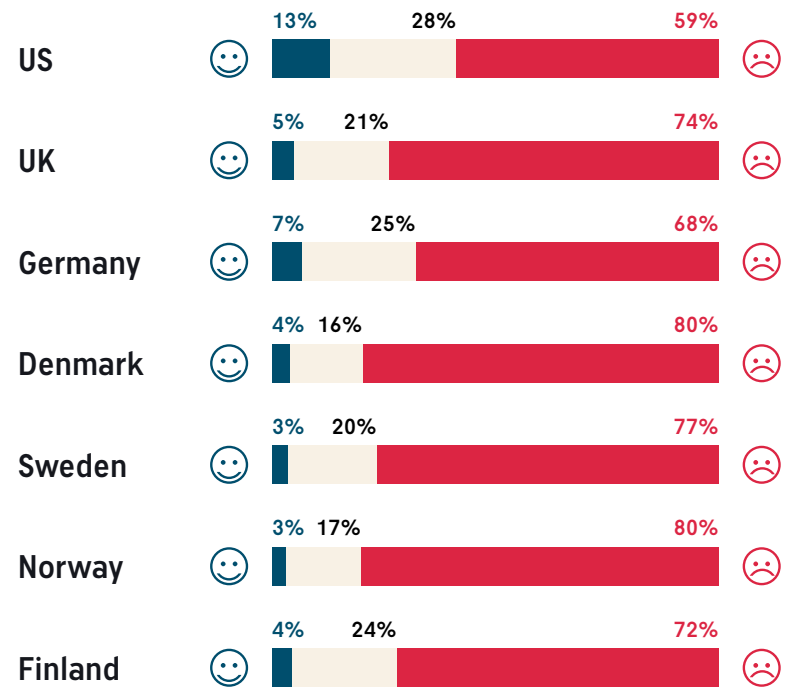
# People are particularly annoyed with ads in online video clips

[ What is the attitude towards ads on websites and in online video clips? ]

## Attitude towards ads on websites

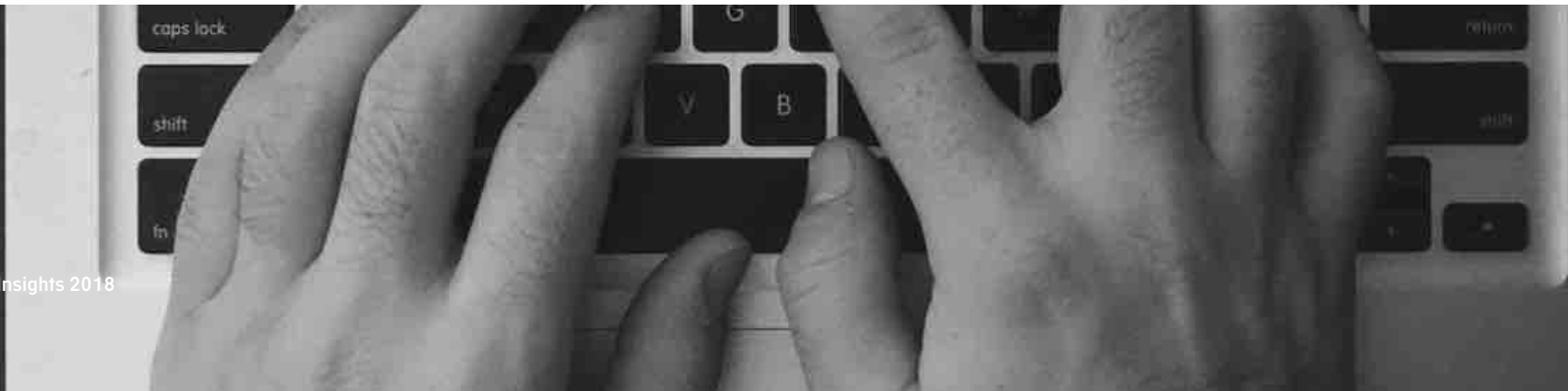
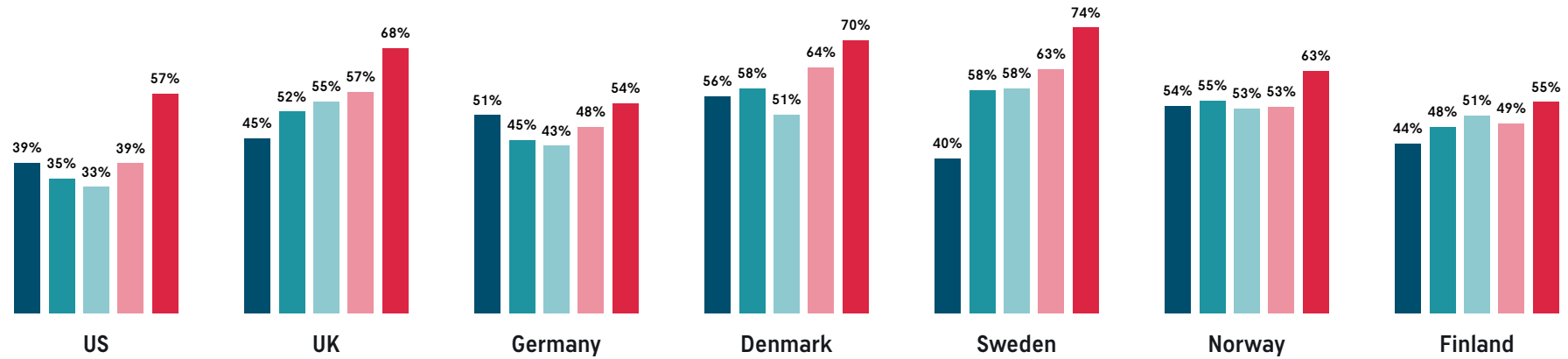
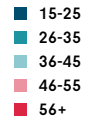


## Attitude towards ads in online video clips



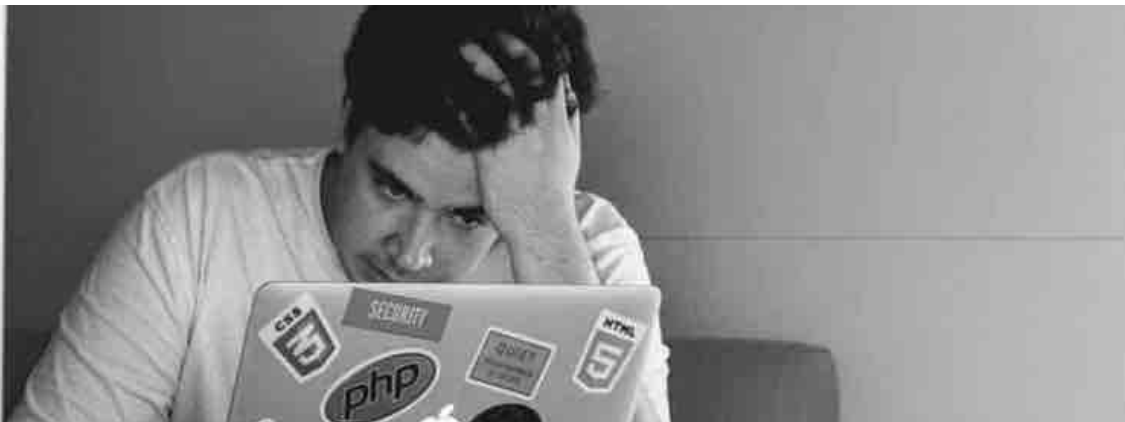
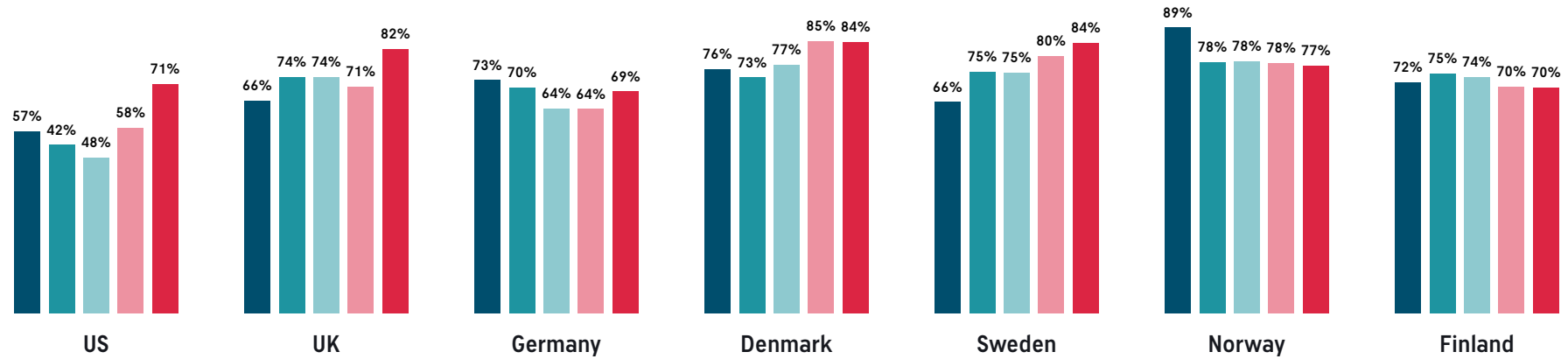
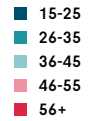
## Especially older people are annoyed with ads on websites

[ How many have a negative attitude towards ads on websites? ]



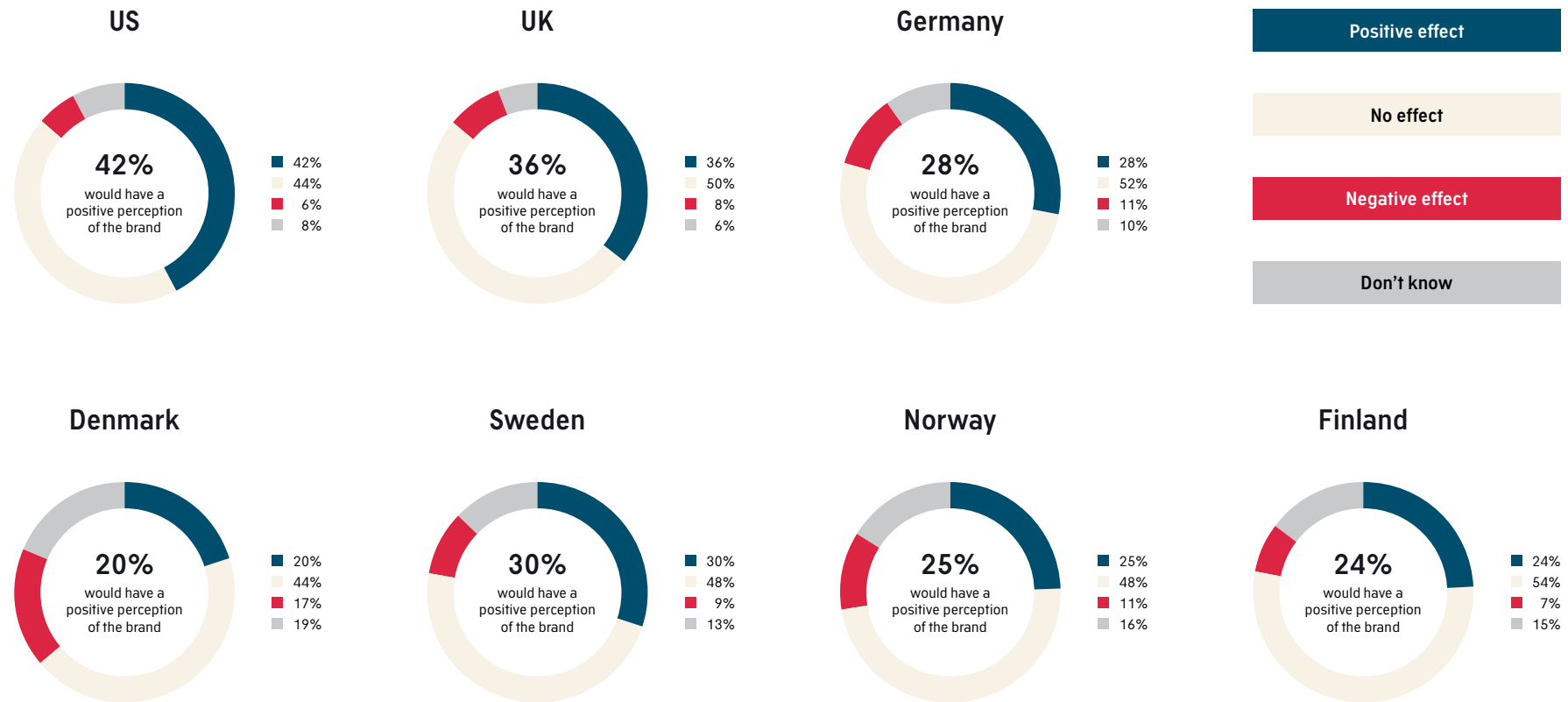
## Both young and old are very annoyed with ads in online video clips

[ How many have a negative attitude towards ads in online video clips? ]



# Ads shown next to relevant content have little positive effect on brand perception

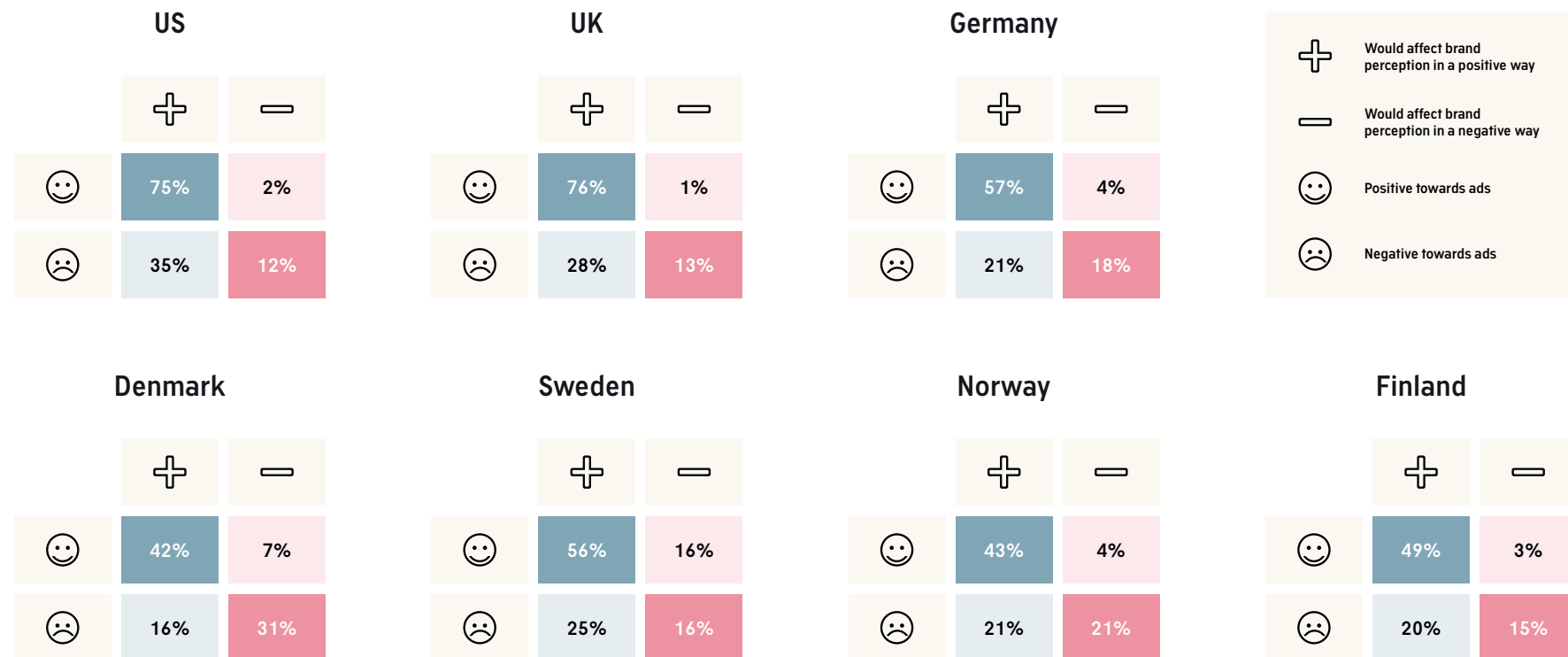
[ How would it affect people's perception of a brand if it was advertised next to relevant and trustworthy content? ]





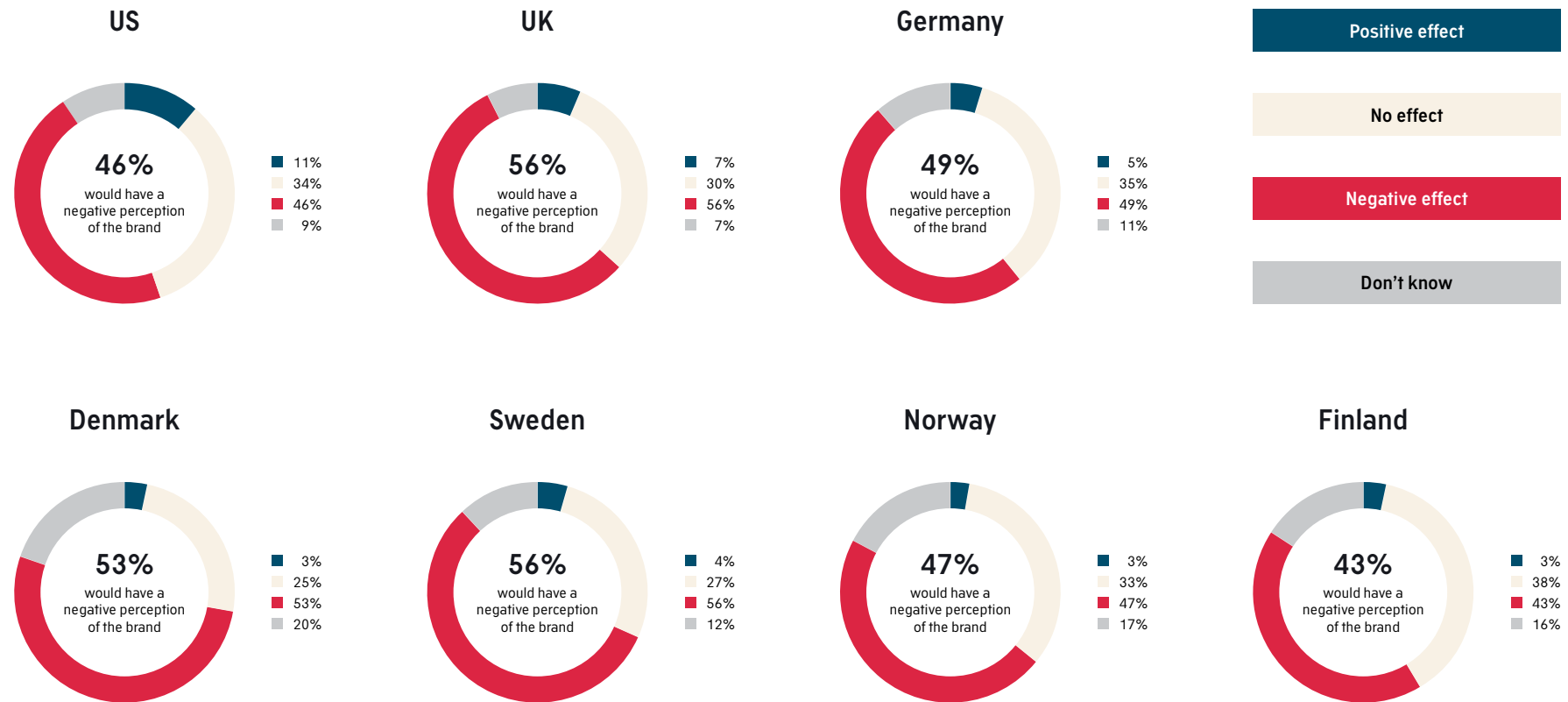
## Effect on brand perception when ads are shown next to relevant content differs a lot among those who are positive and negative towards ads

[ How many of those who are positive and negative towards ads would have a positive and negative perception of a brand if it was advertised next to relevant and trustworthy content? ]



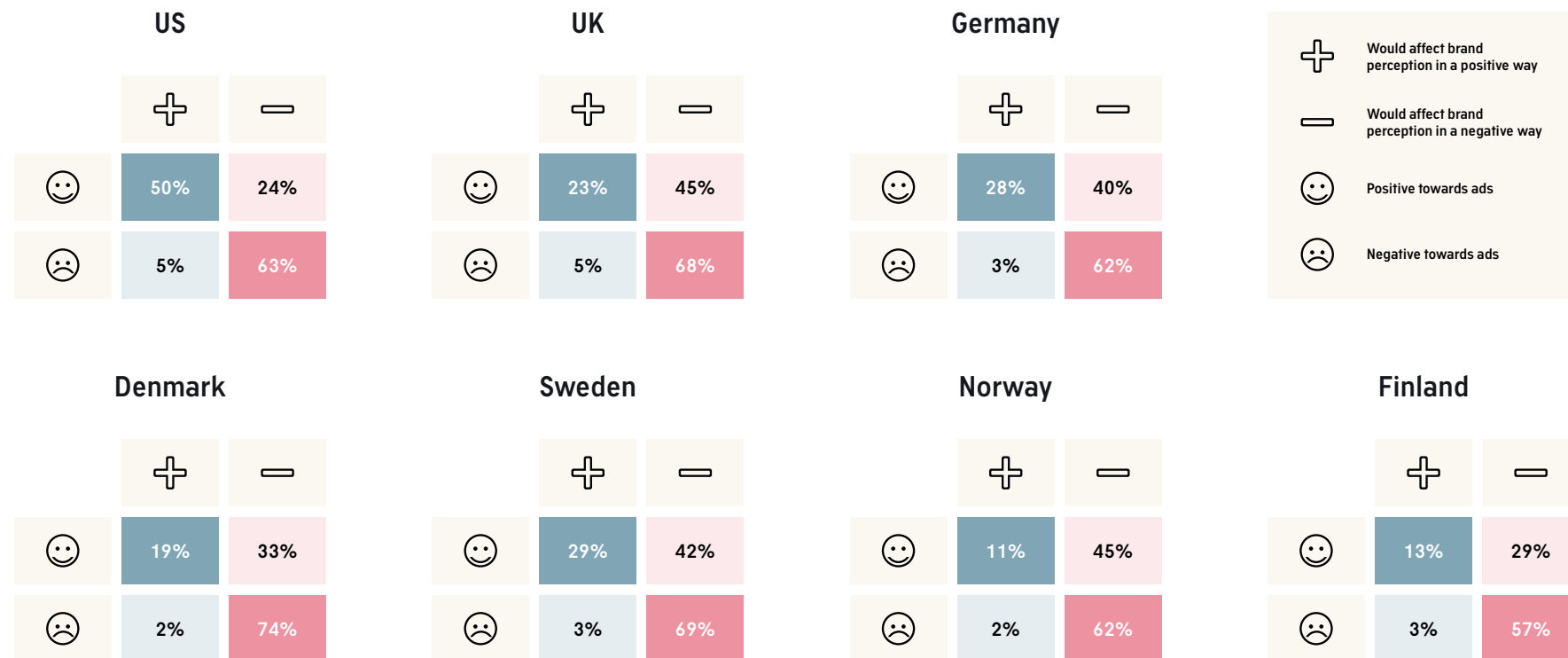
# Ads shown in non-brand safe environments cause a negative perception of brands

[ How would it affect people's perception of a brand if it was advertised next to offensive and/or controversial content? ]



## Effect on brand perception when ads are shown in non-brand safe environment differs a lot among those who are positive and negative towards ads

[ How many of those who are positive and negative towards ads would have a positive and negative perception of a brand if it was advertised next to offensive and/or controversial content? ]





# AD BLOCKING

Ad blocking is still a huge problem for the advertising industry. And unlike earlier, ad blocking on mobile is now also gaining ground. However, there is a big difference between the number of people using an ad blocker and the number of sessions where ads are blocked.

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## Answered use of ad blocking vs detected use of ad blocking

In this study, we are showing the use of ad blocking in two different ways; the **answered use of ad blocking** and the **detected use of ad blocking**.

The answered use of ad blocking is related to the respondents' answers on whether they use ad blocking, while the detected use of ad blocking is related to the sessions, where we have detected a use of ad blocking. This means that the answered use of ad blocking represents the number of people having an ad blocker on one device or another, while the detected use of ad blocking represents the number of sessions being blocked by an ad blocker on the device used when the survey was answered.

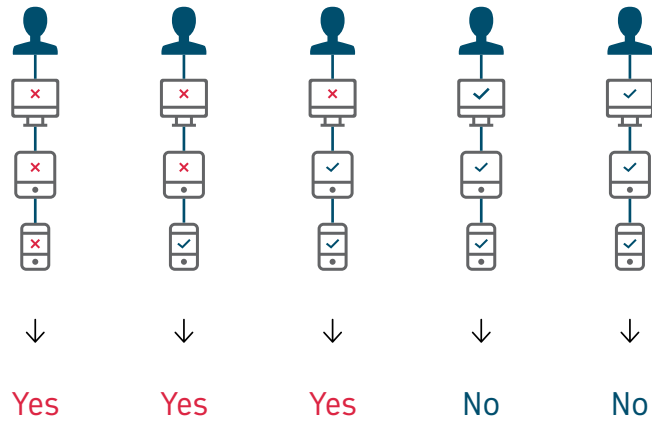
The discrepancy between the answered use of ad blocking and the detected use of ad blocking can be explained by the differences in metrics. An individual who uses an ad blocker will most likely not use it every time she visits a website as she most likely will not use an ad blocker on all devices and in every browser. Furthermore, even though a respondent believes she uses an ad blocker, it might not be active at all time or can be inactive for several reasons.

In the following, we will clarify when the use of ad blocking represents the number of people who have answered that they use an ad blocker and when the results represent the number of sessions where we have detected a use of ad blocking.

## Answered use of ad blocking



Survey question: Do you use an ad blocker?

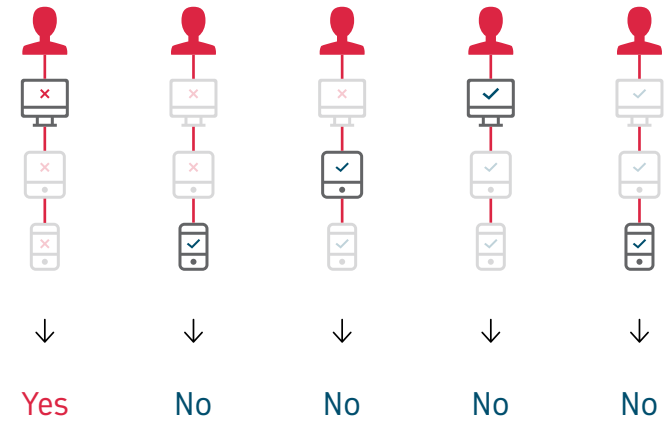


Conclusion: **60%** use an ad blocker

## Detected use of ad blocking



In how many **sessions** is use of ad blocking detected?



Conclusion: **20%** of sessions are blocked



## Knowledge of ad blocking surprisingly low in the Nordics

[ How many know what an ad blocker is? ]

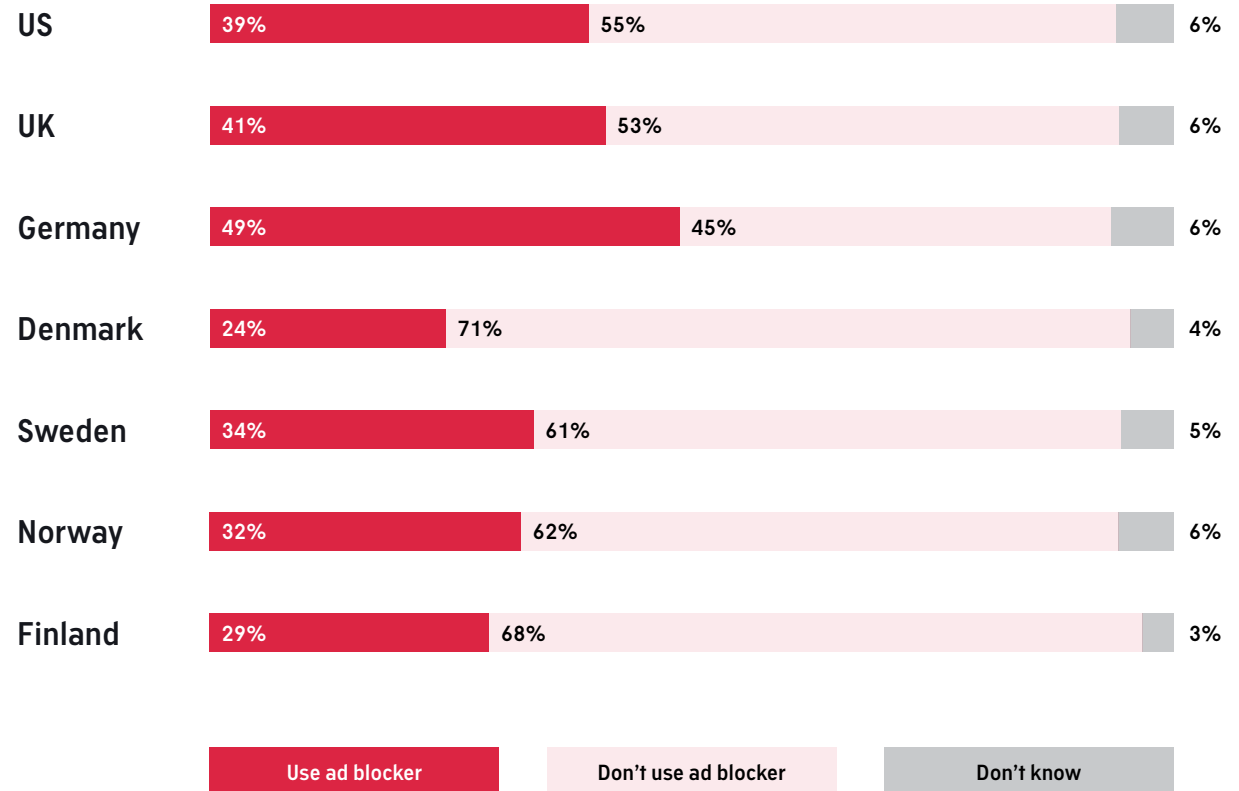






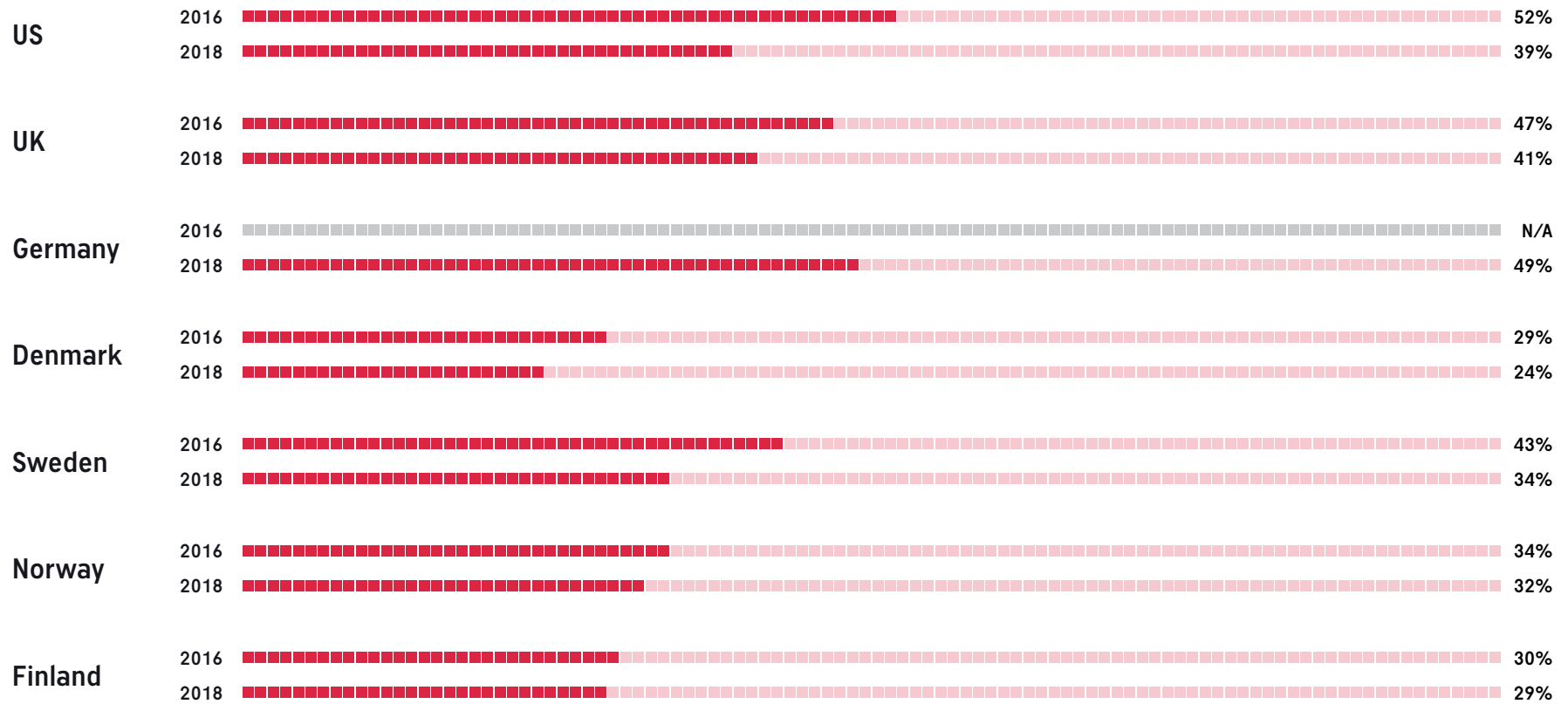
## Ad blocking most widely used in the US, UK and Germany

[ How many have **answered** that they use an ad blocker? ]



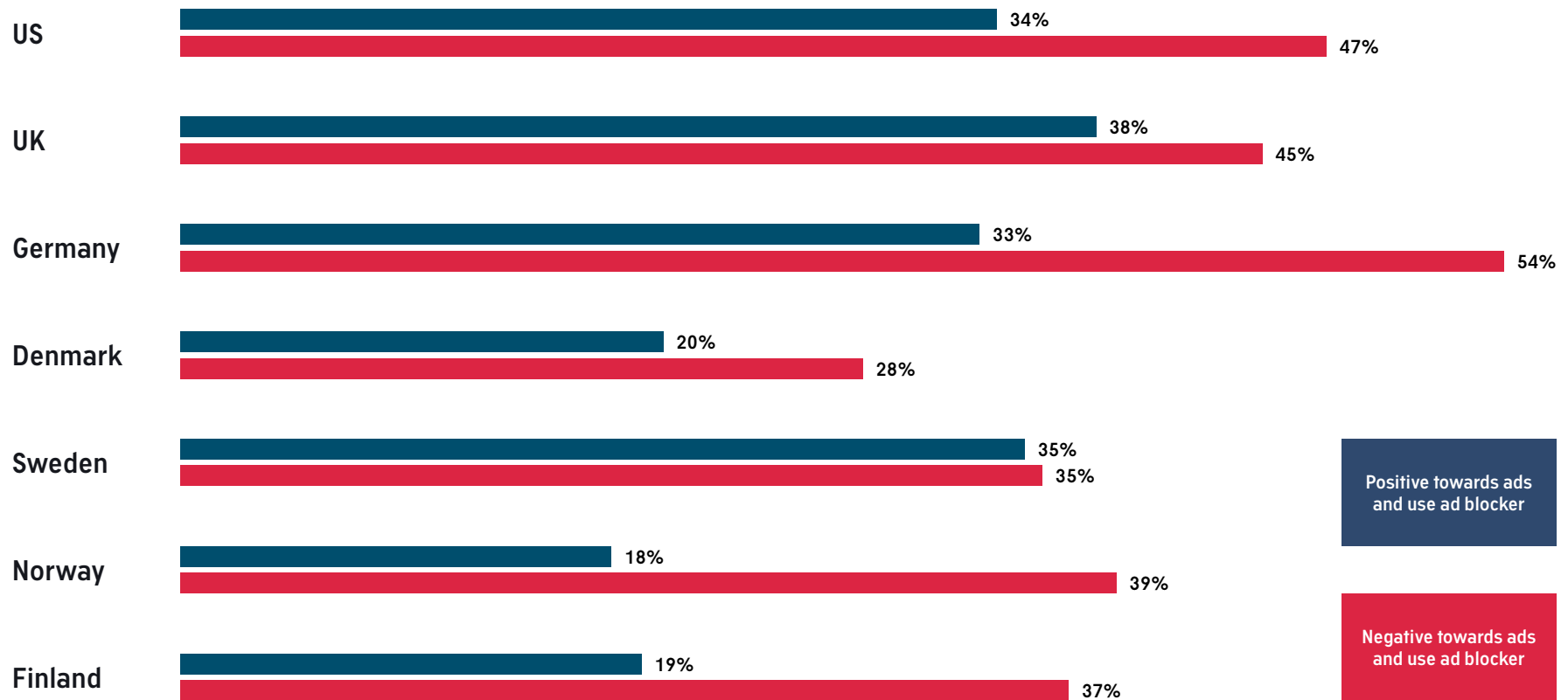
## Number of people using ad blocking has decreased over the past two years

[ How many have **answered** that they use an ad blocker? ]



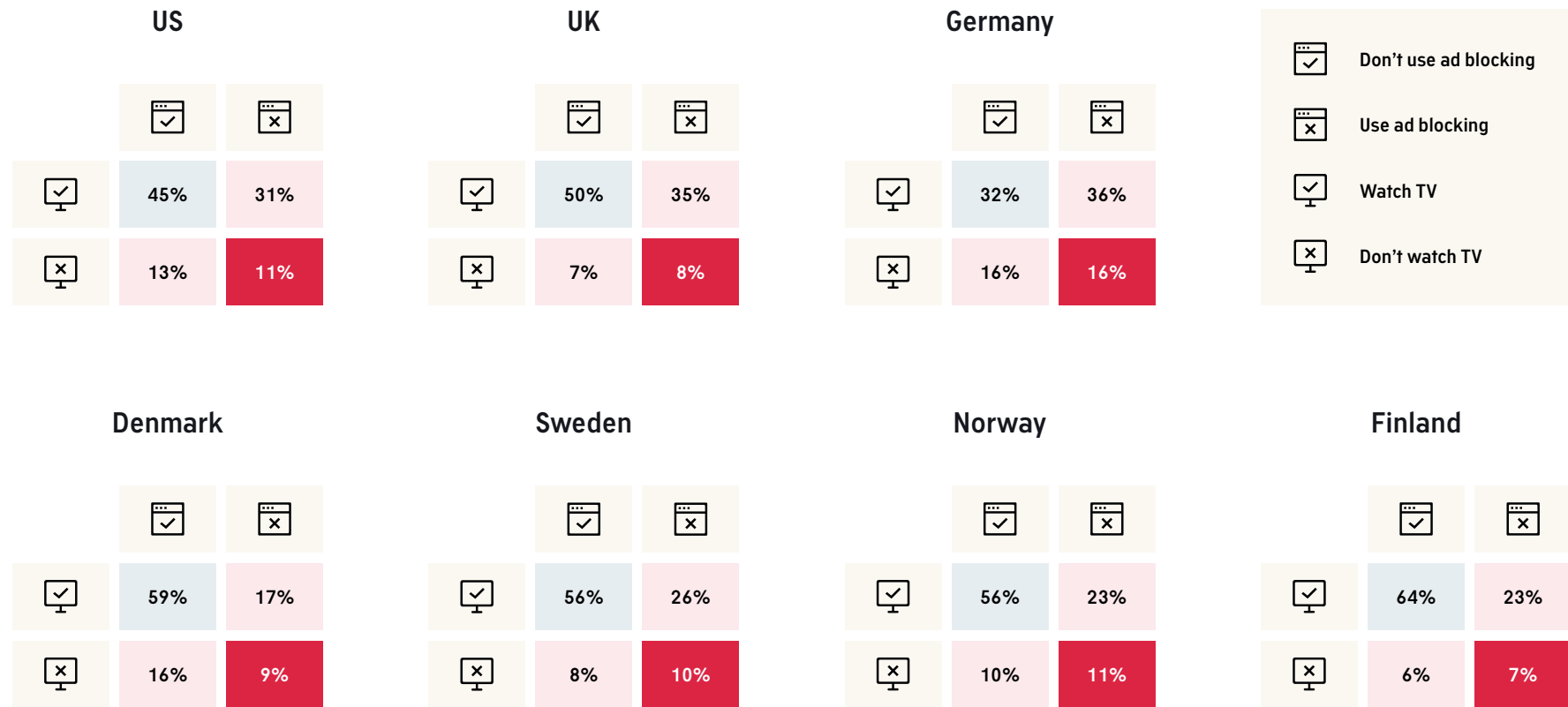
## Clear correlation between attitude towards advertising and use of ad blocking

[ How many of those who are positive and negative towards ads on websites have **answered** that they use an ad blocker? ]



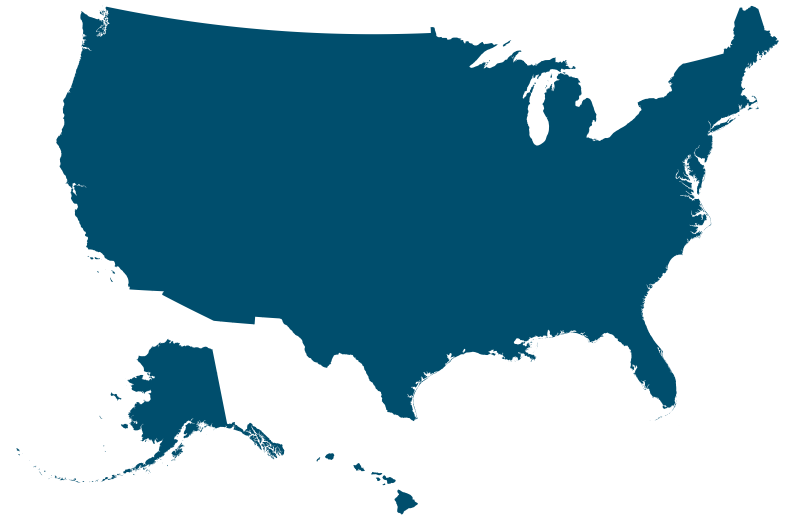
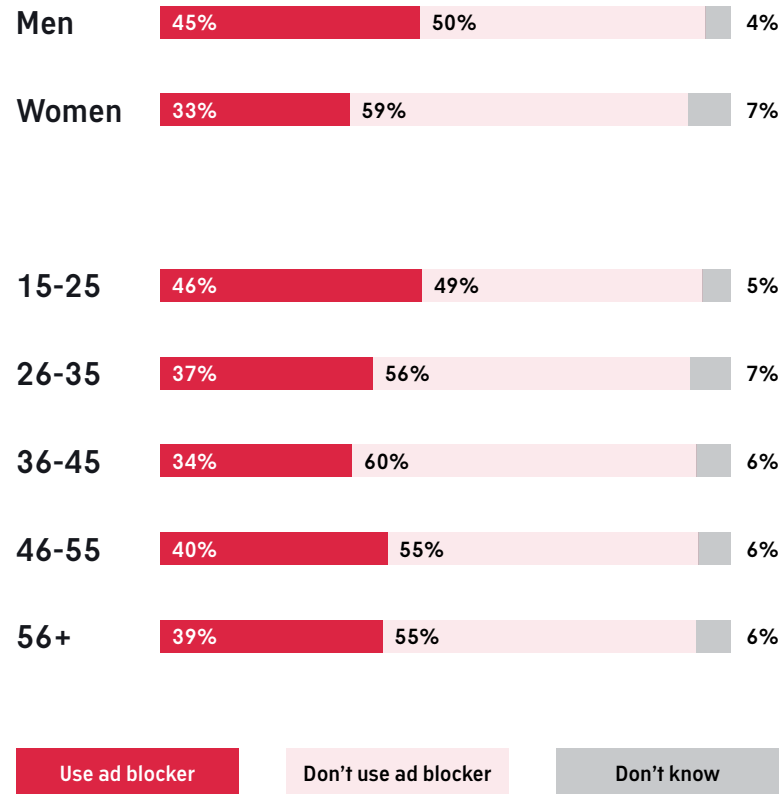
# One in ten can't be reached either online or on TV

[ How many of those who have **answered** that they use an ad blocker don't watch TV on a weekly basis? ]



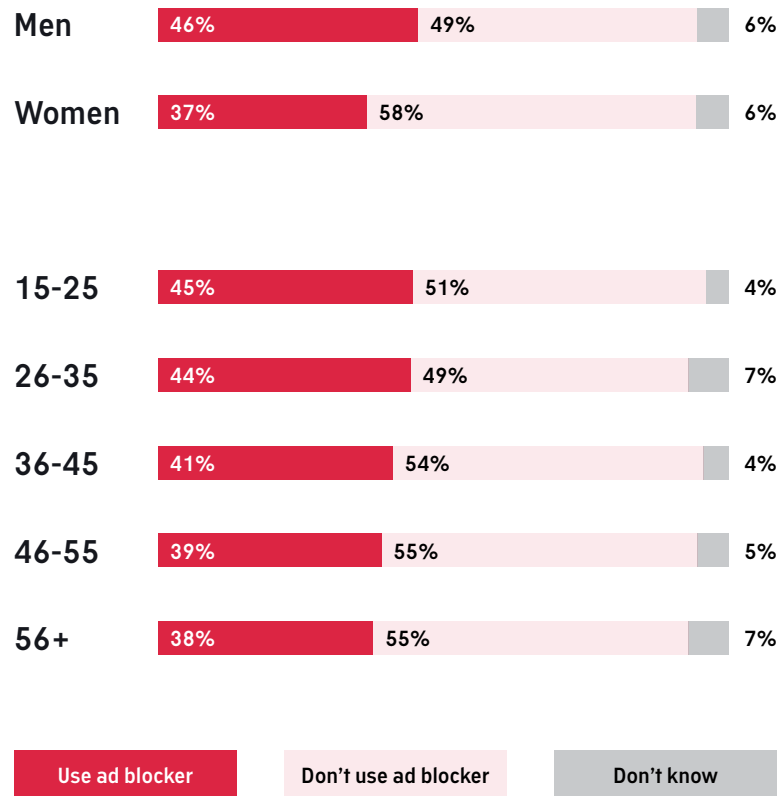
## Both young and old are blocking ads in the US

[ How many across gender and age in the US have **answered** that they use an ad blocker? ]



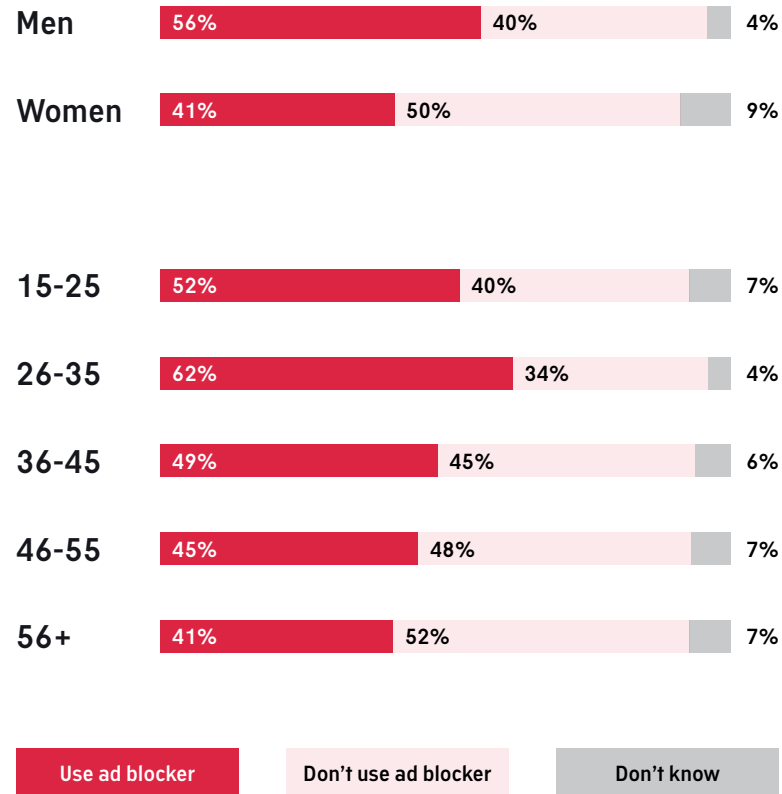
## Use of ad blocking varies only a little across gender and age in the UK

[ How many across gender and age in the UK have **answered** that they use an ad blocker? ]



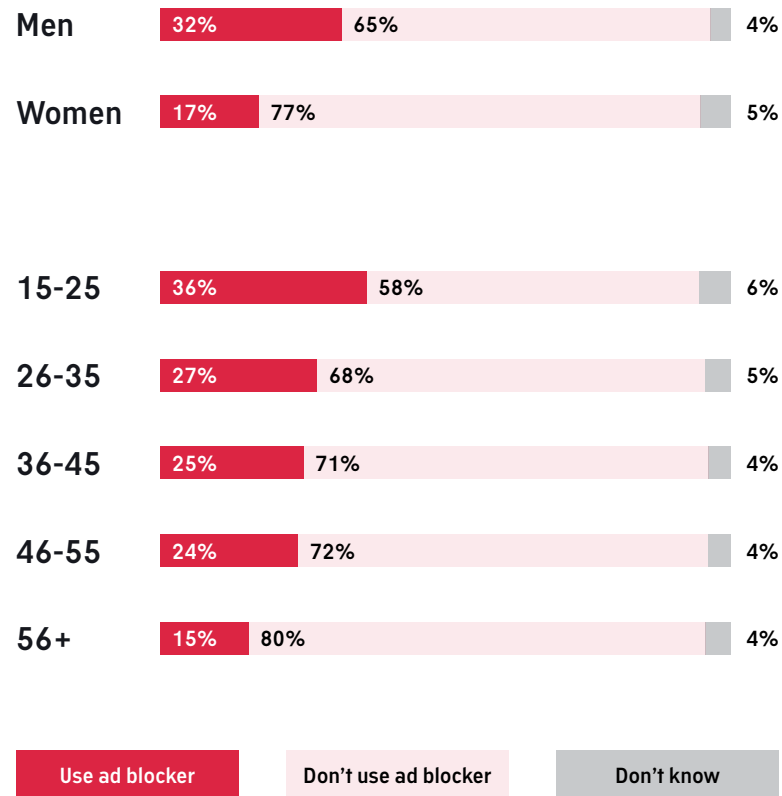
## More than half of all young Germans are blocking ads

[ How many across gender and age in Germany have **answered** that they use an ad blocker? ]



## Twice as many men as women are blocking ads in Denmark

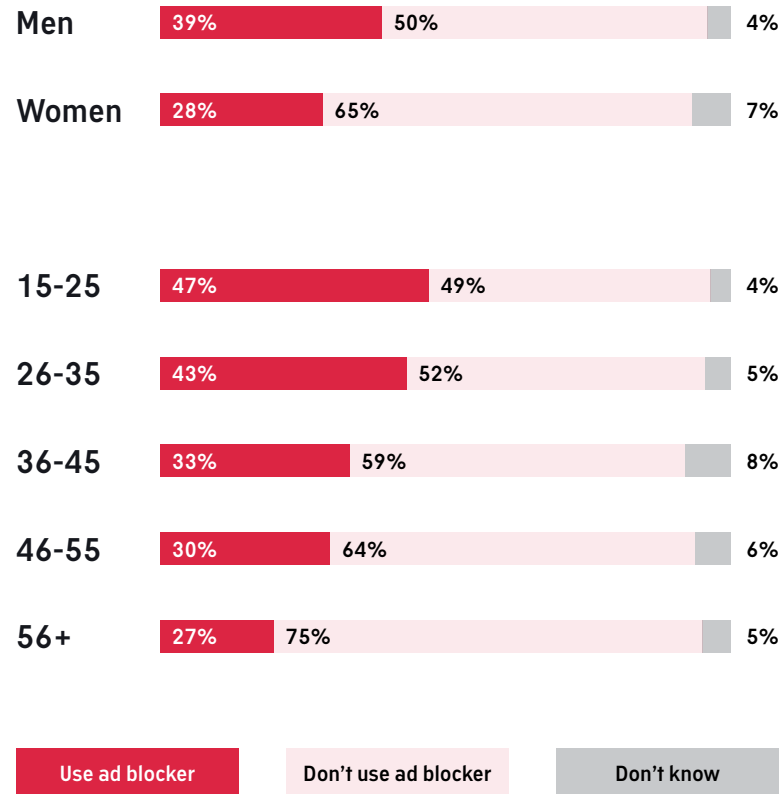
[ How many across gender and age in Denmark have **answered** that they use an ad blocker? ]





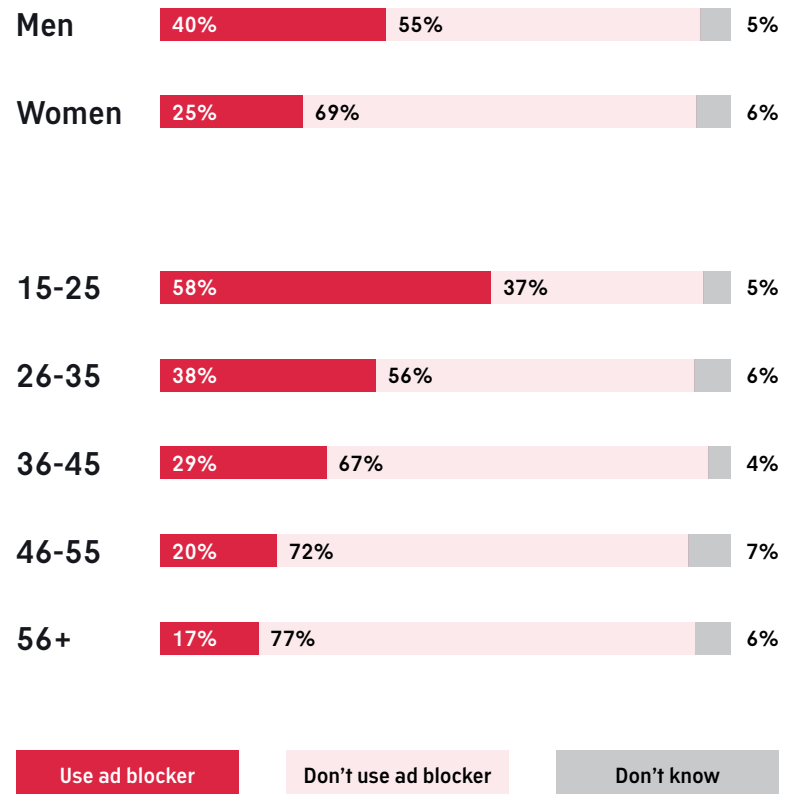
## More than a quarter across all age groups are blocking ads in Sweden

[ How many across gender and age in Sweden have **answered** that they use an ad blocker? ]



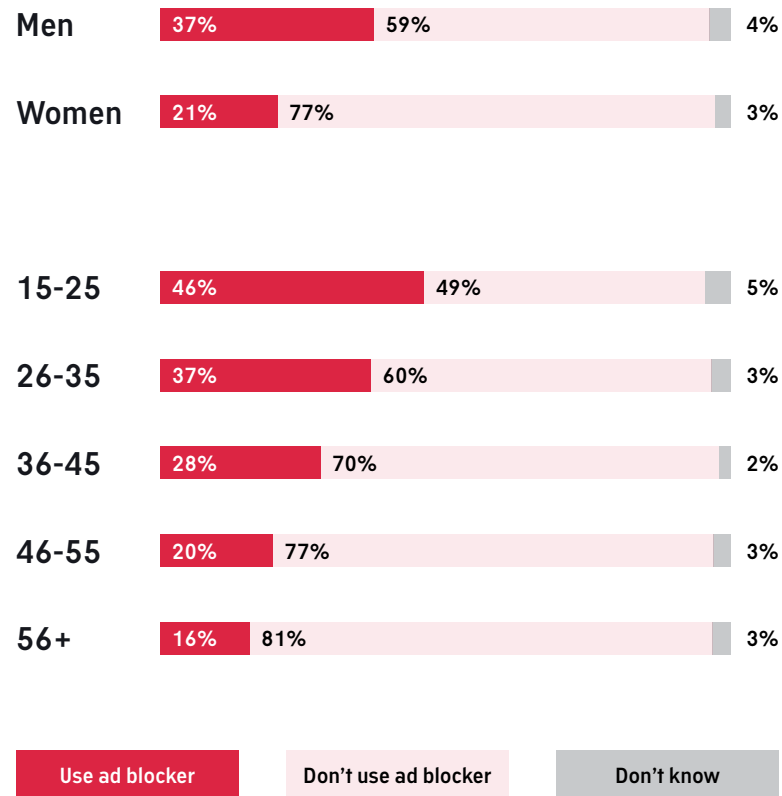
## Huge difference between use of ad blocking among young and old in Norway

[ How many across gender and age in Norway have **answered** that they use an ad blocker? ]



## Use of ad blocking much more common among young than old in Finland

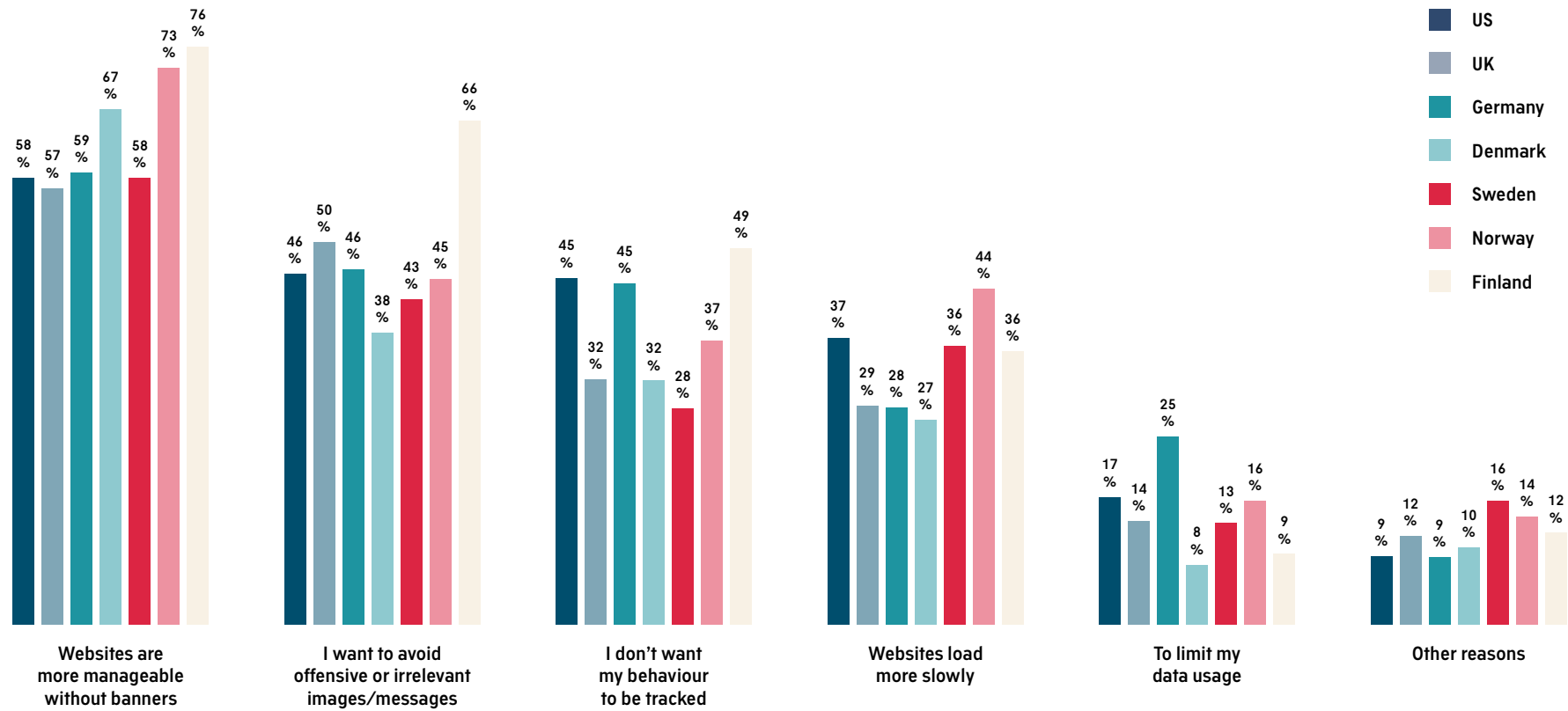
[ How many across gender and age in Finland have **answered** that they use an ad blocker? ]





# Website layout and irrelevant ads are the main reasons for using ad blocking

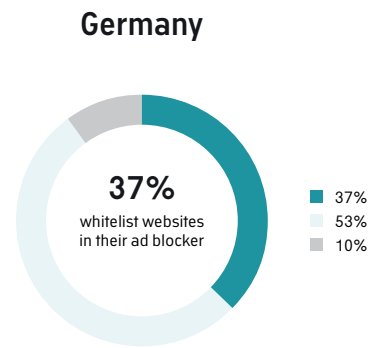
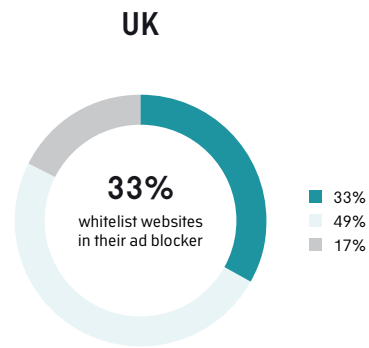
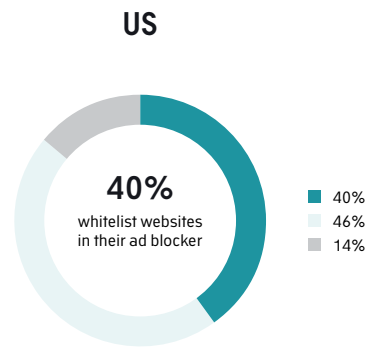
[ Why do people use ad blockers? ]






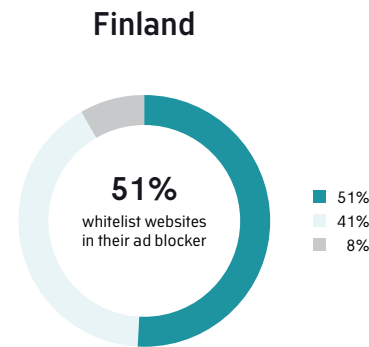
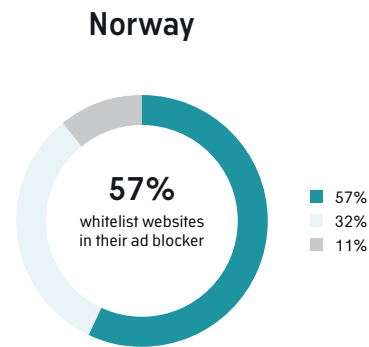
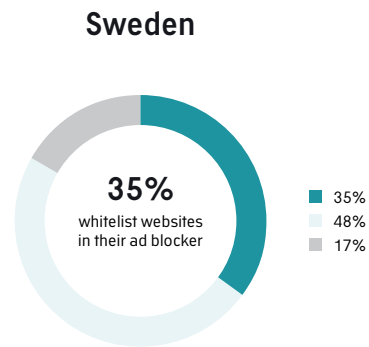
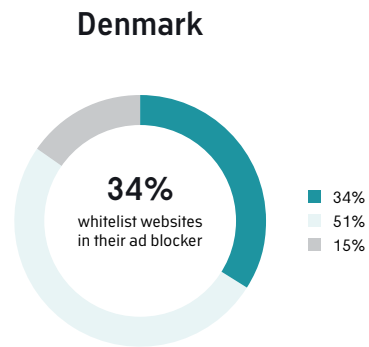
# Around half have whitelisted websites in their ad blocker

[ How many have whitelisted selected websites in their ad blocker? ]

**Whitelisting**  
 Most ad blockers allow the user to whitelist selected websites where the ad blocker is not active and the ads on the websites are thus not being removed



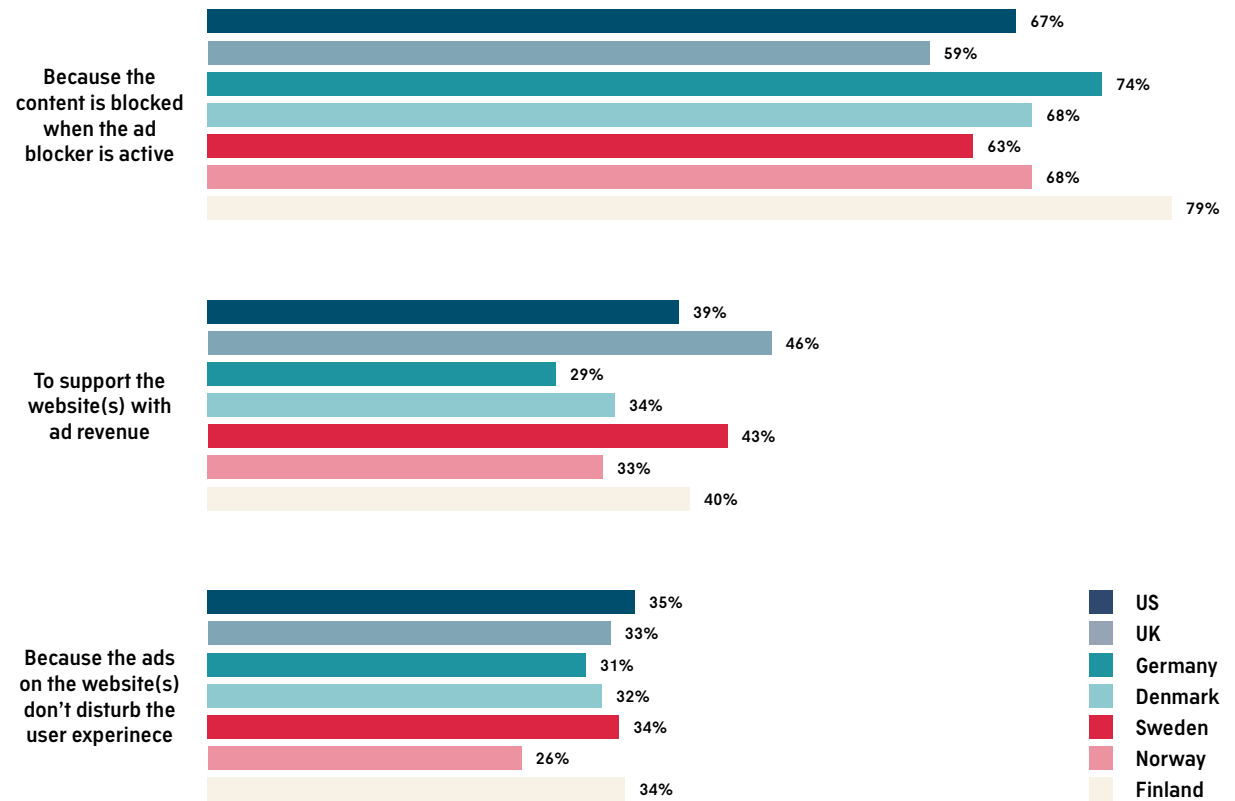
-  Have whitelisted websites
-  Have not whitelisted websites
-  Don't know





## People whitelist websites to get access to blocked content








[ Why do people whitelist selected websites? ]



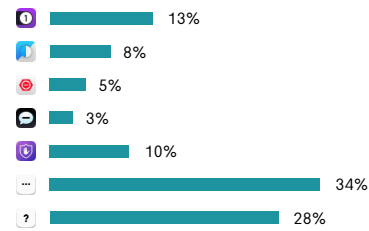
# iOS ad blockers

[ Which ad blockers do people use on their iOS mobiles? ]

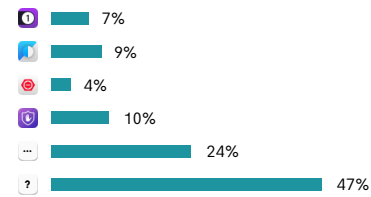
## iOS ad blockers

-  1Blocker
-  Purify: Ad Blocking Perfected
-  Roadblock - Content Blocker
-  Shut Up: Comment Blocker
-  Weblock: adblock & proxy
-  Other
-  Don't know

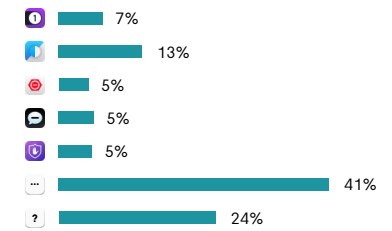
## US



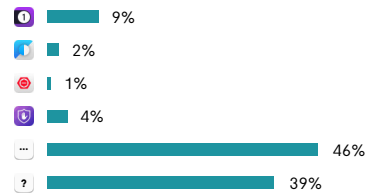
## UK



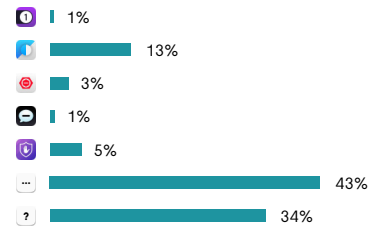
## Germany



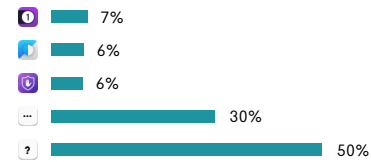
## Denmark



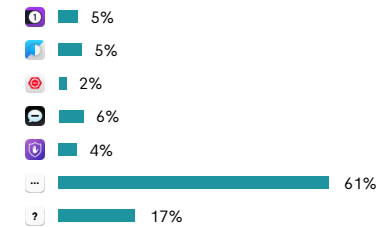
## Sweden



## Norway



## Finland













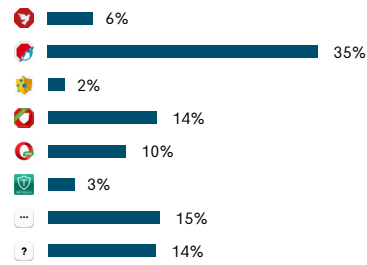
# Android ad blockers

[ Which ad blockers do people use on their Android mobiles? ]

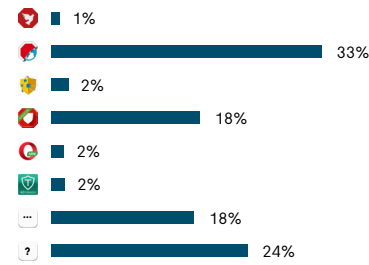
## Android ad blockers

-  Ad away
-  Adblock Browser for Android
-  AppBrain Ad Detector
-  Free Adblocker Browser
-  Opera Mini
-  TrustGo Ad Detector
-  Other
-  Don't know

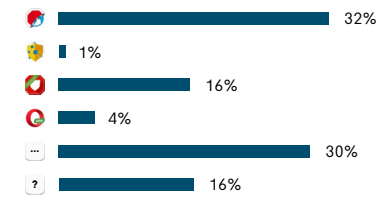
## US



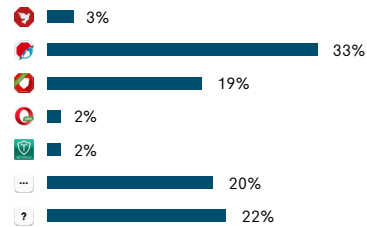
## UK



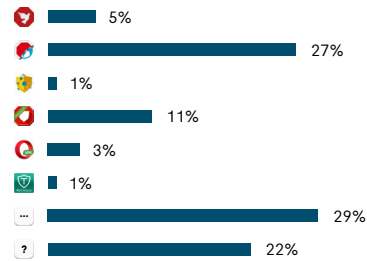
## Germany



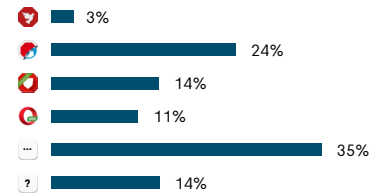
## Denmark



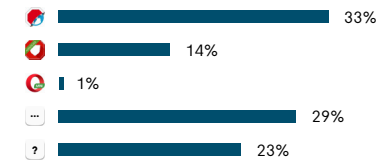
## Sweden



## Norway

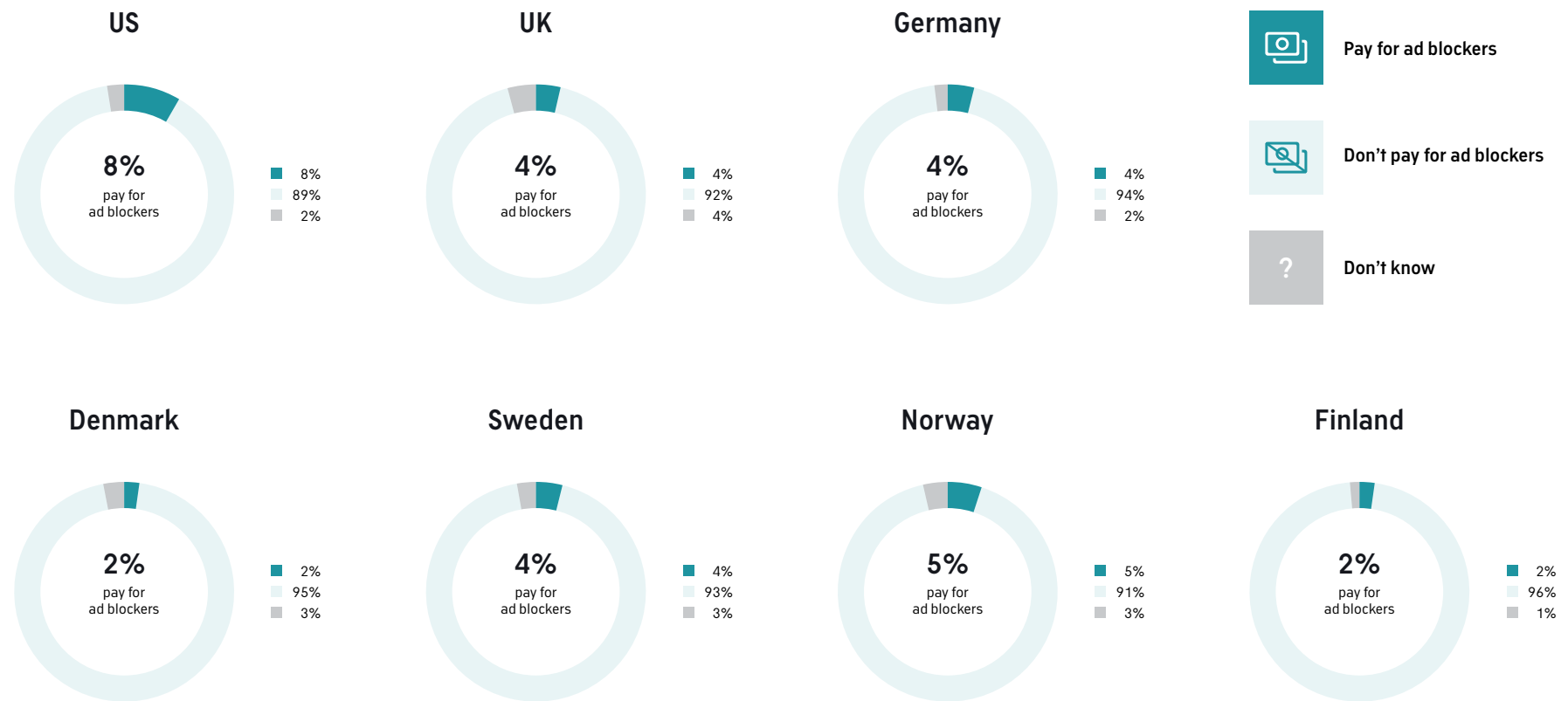


## Finland



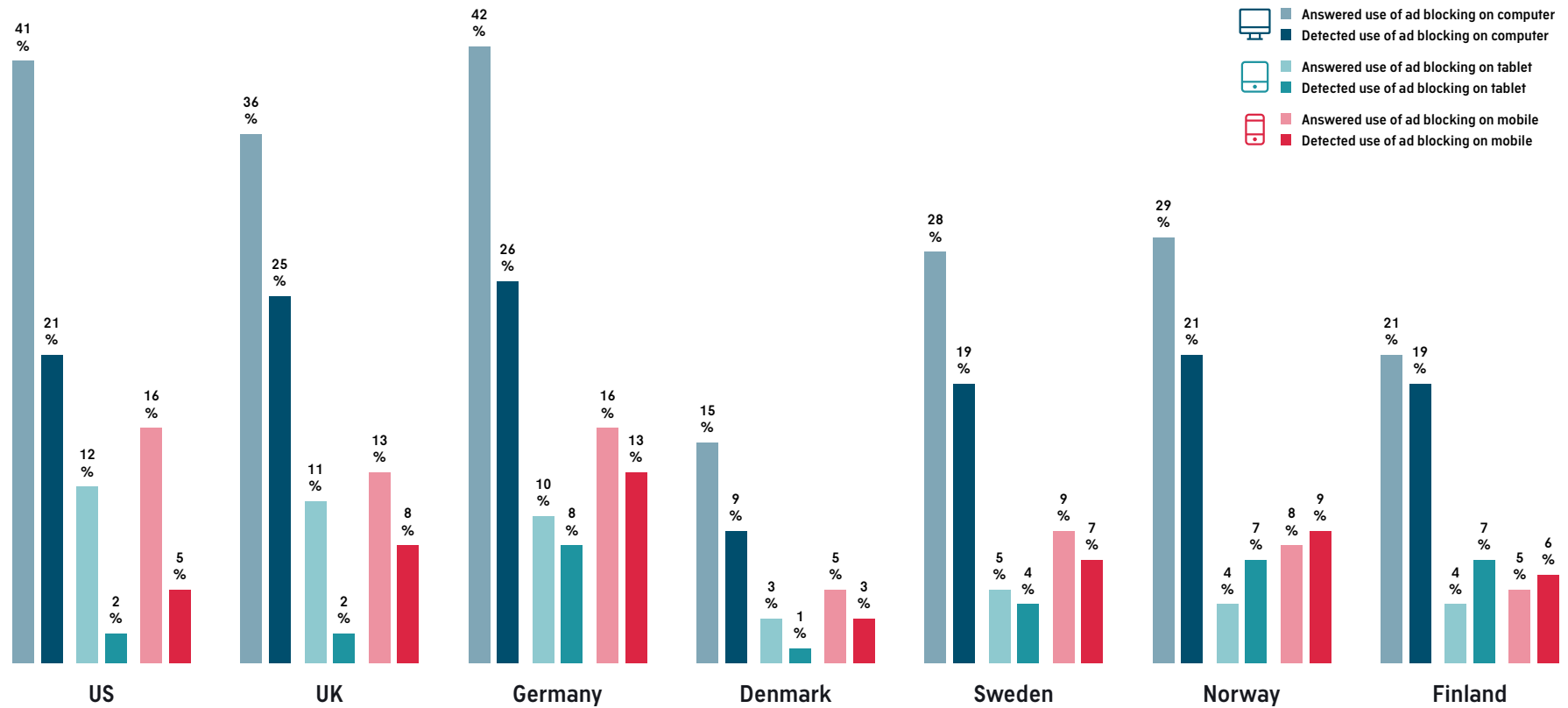
## Very few using ad blockers pay for their ad blockers

[ How many of those using ad blockers pay for ad blockers? ]



## Detected use of ad blocking significantly lower than answered use of ad blocking

[ How many have **answered** that they use an ad blocker and in how many sessions have we **detected** a use of ad blocking on computer, tablet and mobile? ]





## Detected use of ad blocking on computer is stable

[ In how many have sessions have we **detected** a use of ad blocking on computer? ]

	2016 Q1	2016 Q3	2018
US	-	23%	21% (-2%)
UK	-	26%	25% (-1%)
Germany	-	-	26%
Denmark	14%	12% (-2%)	9% (-3%)
Sweden	18%	19% (+1%)	19% (0%)
Norway	15%	19% (+4%)	21% (+2%)
Finland	15%	17% (+2%)	19% (+2%)



## Detected use of ad blocking on mobile has increased a lot

[ In how many have sessions have we **detected** a use of ad blocking on mobile? ]

	2016 Q1	2016 Q3	2018
US	-	2%	5% (+3%)
UK	-	2%	8% (+6%)
Germany	-	-	13%
Denmark	4%	1% (-3%)	3% (+2%)
Sweden	4%	2% (-2%)	7% (+5%)
Norway	3%	3% (0%)	9% (+6%)
Finland	2%	2% (0%)	6% (+4%)



# ABOUT THE STUDY

## Methodology

The study is a part of AudienceProject Insights 2018. Data is collected through online surveys done in Q2 2018. The respondents have been selected from our Nordic, German, UK and US panels consisting of more than 1.5 million panelists and weighed to achieve representativity on the more than 16.000 respondents who completed the survey.

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## About AudienceProject

AudienceProject is a marketing technology company founded in Denmark and operational worldwide. Based on its proprietary tech stack and more than 1.5 million panelists worldwide, AudienceProject helps brands, agencies and publishers identify, target and validate audiences.

**AudienceProject** >=