



Adblocking goes mainstream

PageFair and Adobe 2014 report

How adblocking is changing the web

In this sequel to the August 2013 report (*The Rise of Adblocking*) PageFair, with the help of Adobe, reveals data on the true scale and growth of adblocking as well as where it is having the biggest impact. To see what motivates people to take action against current forms of online advertising this report has also been supplemented with a survey of adblock users.

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Key insights

The adblock community is expanding rapidly.

- In Q2 2014 there were approximately **144 million** monthly active adblock users globally (**4.9%** of all internet users); a number which has increased **69%** over the previous 12 months.
- Google Chrome is bringing ad blocking to the masses and seeing the largest increase of adblockers, up by **96%** to approximately **86 million** monthly active users between Q2 2013 and Q2 2014.
- Share of ads blocked by “end-user installed” browsers is **4.7x** higher than by “pre-installed” browsers.

Adblock adoption is happening all over the world

- Poland, Sweden, Denmark, and Greece are leading the way with an average of **24%** of their online populations using adblocking software in Q2 2014.
- Countries like Japan, Spain, China and Italy are catching up; with their percentage of online populations that use adblock plug-ins growing as much as **134%** over the last 12 months.

Not all adblockers, ads, or adblock users are equal

- Adblock adoption is extremely high in certain demographics, with **54%** of male survey respondents between 18-29 years saying they use adblocking software.
- There is an ongoing struggle between the “pay” and “free” content models where **80%** of survey respondents are unwilling to pay for ad-free content; meanwhile **61%** of those same respondents were “completely unwilling” to see ads which support free content.
- Men are **48%** more likely than women to use adblock plug-ins when browsing.
- Adblock users believe some ads are worse than others, and the majority are willing to view non-intrusive ad formats.
- Currently adblocking is relatively low on mobile, but upcoming mobile adblock plug-in solutions may change that.

Adblocking growth

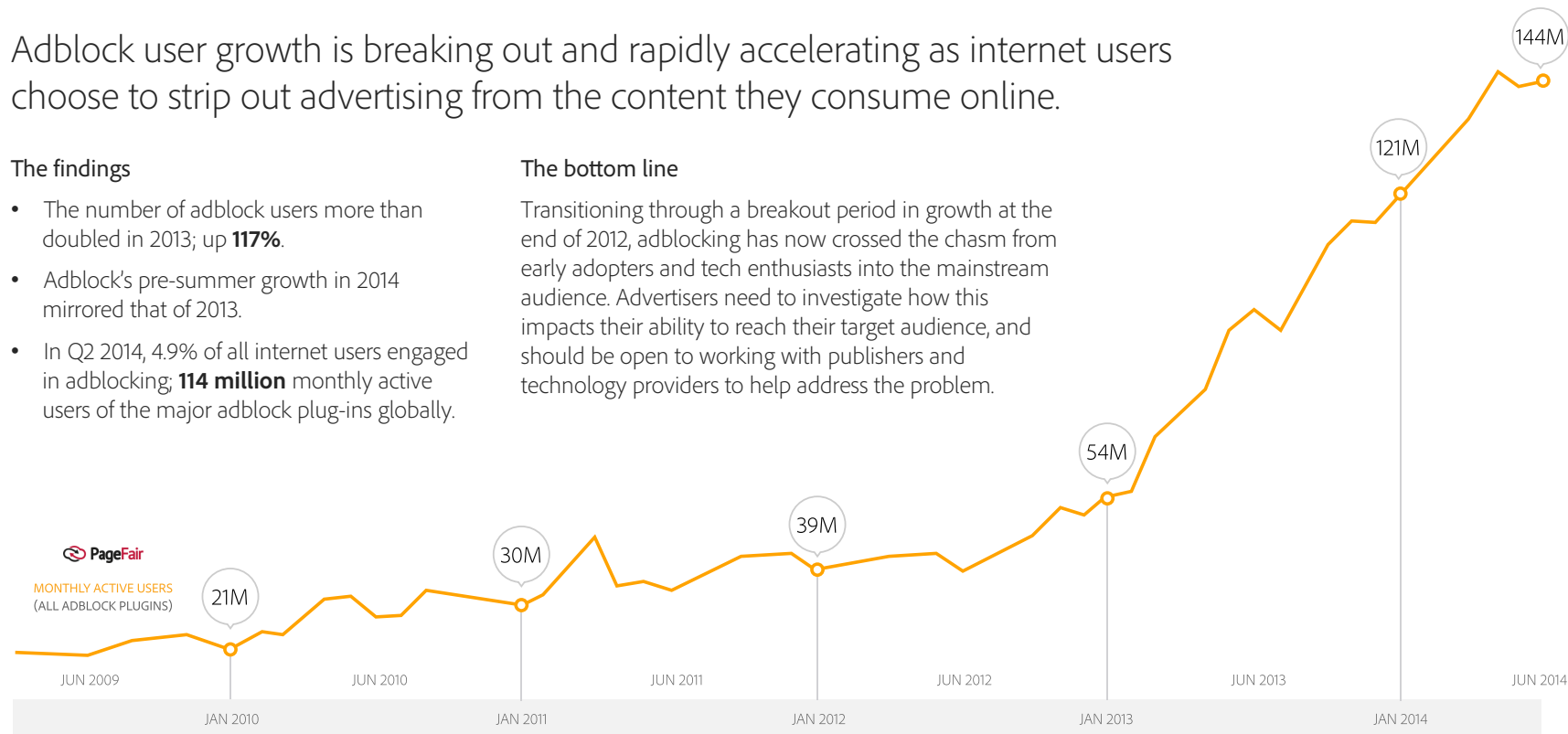
Adblock user growth is breaking out and rapidly accelerating as internet users choose to strip out advertising from the content they consume online.

The findings

- The number of adblock users more than doubled in 2013; up **117%**.
- Adblock's pre-summer growth in 2014 mirrored that of 2013.
- In Q2 2014, 4.9% of all internet users engaged in adblocking; **114 million** monthly active users of the major adblock plug-ins globally.

The bottom line

Transitioning through a breakout period in growth at the end of 2012, adblocking has now crossed the chasm from early adopters and tech enthusiasts into the mainstream audience. Advertisers need to investigate how this impacts their ability to reach their target audience, and should be open to working with publishers and technology providers to help address the problem.



Google Chrome is a major driver of adblock growth

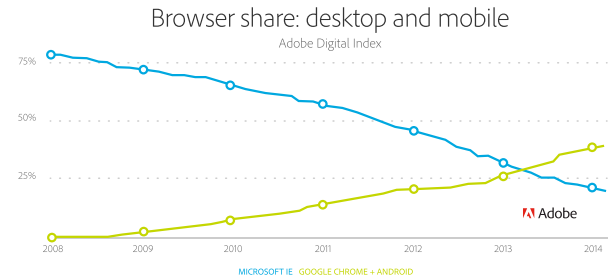
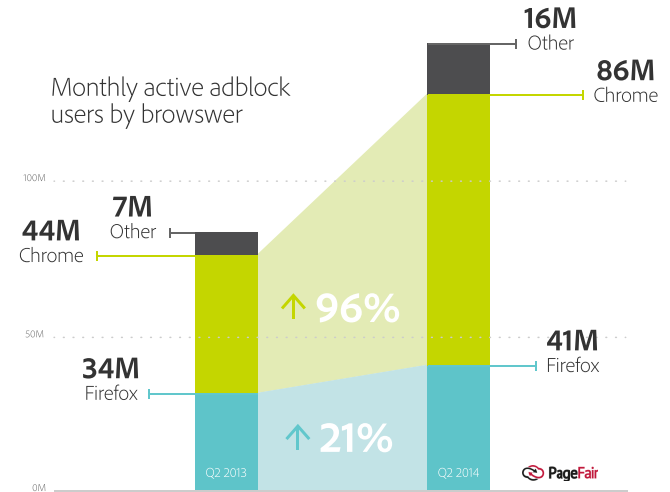
The ease with which adblock plug-ins can be installed on Google Chrome, combined with the rapid shift of internet users to Chrome for browsing, are major drivers in adblock growth.

The findings

- The number of adblock users on Chrome has nearly doubled from Q2 2013 to Q2 2014; up **96%**.
- Adblock user growth on Firefox is comparatively stable over the same time period; up **21%**.
- According to an Adobe Digital Index Report released in June 2014, Google Chrome surpassed Internet Explorer as the #1 browser in Q4 2013.

The bottom line

Over the last 6 years, Chrome has steadily captured mainstream browsing market share away from Internet Explorer (see ADI report). It is well known that Google's primary business is in online advertising; ironically, Google's own browser appears to be bringing adblocking to the masses.



Adblocking by browser

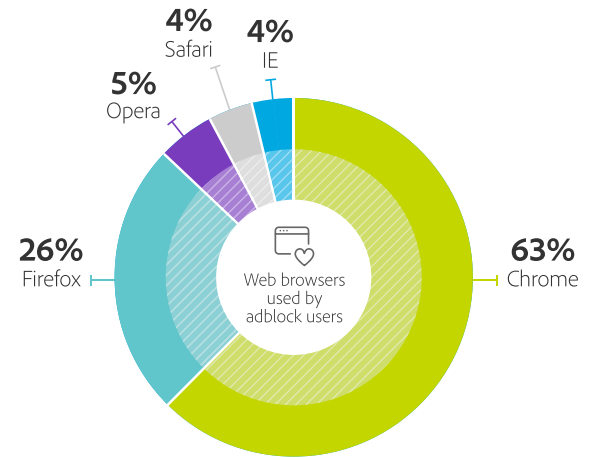
Adblocking is available on all desktop web browsers, but it is exceptionally popular on browsers that require end user installation, such as Chrome, Firefox and Opera. Conversely, adblocking is very low on pre-installed browsers like IE and Safari.

The findings

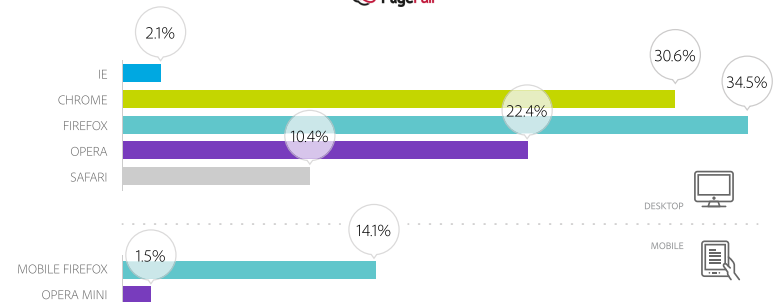
- Share of ads blocked by “end-user installed” browsers is **4.7x** higher than “pre-installed” browsers.
- **94%** of adblocking occurs on “end-user installed” browsers.
- **14.1%** of mobile Firefox visitors to PageFair partner sites have an adblock plug-in installed.

Insight

Although adblocking is becoming more mainstream, our findings still tell us that the less technical demographic hasn't quite caught on to the concept. Users who have the inclination and wherewithal to install a different browser are also more inclined to customize that browser with plugin software; while users of IE and Safari have not yet caught on to the trend.



(ON PAGEFAIR PARTNER SITES Q2 2014)



% ads blocked by browser Q2 2014

(ON PAGEFAIR PARTNER SITES Q2 2014)



Adblocking around the globe

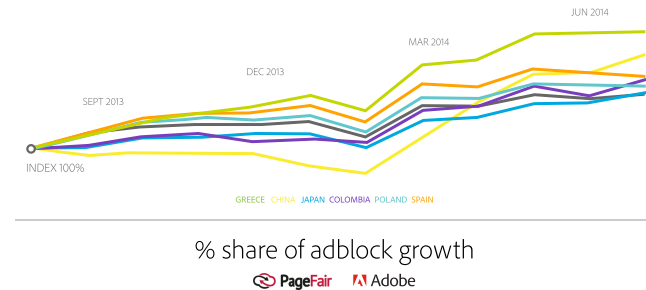
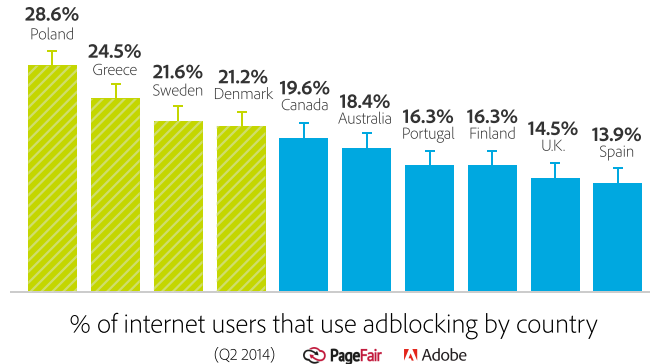
Adblocking is now widespread in western economies and growing in some parts of Asia and South America.

The findings

- Poland, Sweden, Denmark, and Greece are leading the way with around **24%** of their populations using adblock software in Q2 2014.
- Countries like Japan, Spain, China and Italy are catching up with their percentage of population using adblock plug-ins growing as much as **134%** over the last 12 months.

The bottom line

Although the 144 million global adblockers represent only 5% of the global internet population, they are concentrated in western economies, resulting in adblocking rates in the double digits.



Who are the adblockers?

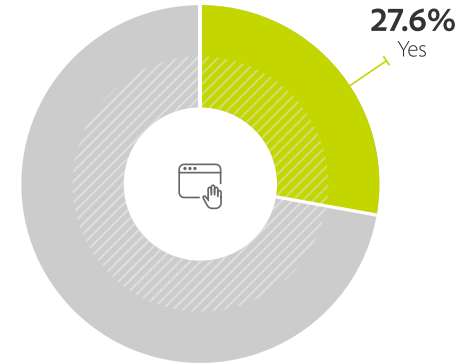
We conducted a survey of U.S. internet users to identify the key demographics who use adblocking and their attitudes towards online advertising. Our findings reveal that the usage of adblocking is driven primarily by male millennial internet users.

The findings

- **27.6%** of U.S. internet users surveyed said they use adblocking software.
- Men are **48%** more likely than women to use adblock plug-ins when browsing.
- Adblocking is exceptionally popular with millennials. Peak usage is with 18-29 year olds, **41%** of whom claim to use adblock software.

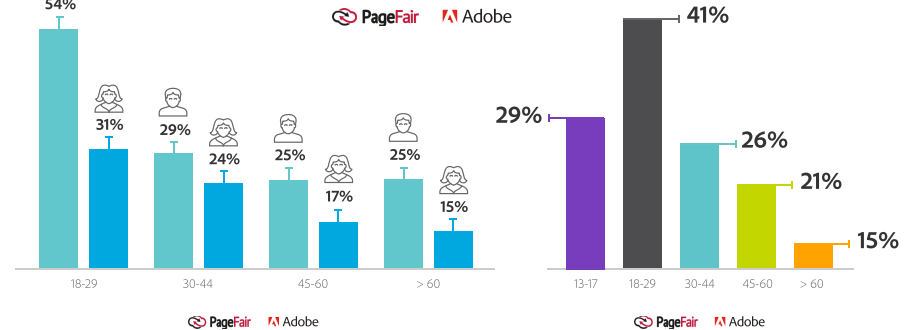
The opportunity

The number of respondents who affirmed that they use adblocking software was higher than U.S. national averages, which may indicate a higher level of technical sophistication among the market research panels surveyed. It is nonetheless clear that adblocking is crossing into widespread usage, and is likely to continue to rise as the age demographic where adblocking is most prevalent, millennials, grows older.



Do you currently use adblocking software in your web browser?

(E.G. 'ADBLOCK PLUS' OR 'ADBLOCK') SAMPLE: 1,621 U.S. INTERNET USERS

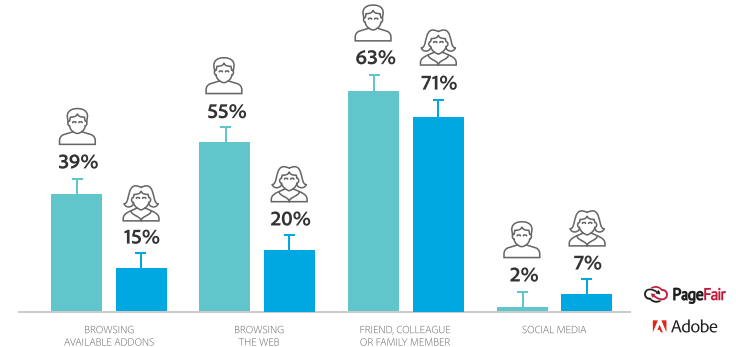
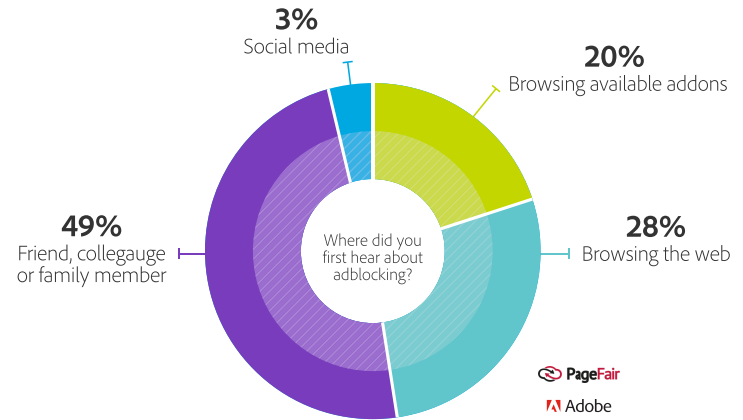


The spread of adblocking

Our study found that the spread of adblocking is driven primarily by word of mouth.

The findings

- Nearly **half** of surveyed adblock users said that they learned about adblocking from someone they knew.
- **28%** of people discovered adblocking by browsing or searching the web.
- **20%** of adblockers discovered adblocking by browsing “available browser extensions” (the adblock extensions are generally listed under “most popular” browser extensions).
- Men are more than **twice** as likely to discover adblocking both on the web or by searching available browser extensions; while women are more likely to learn about it from someone they know.
- Social networks did not play a major role in the spread of adblock software.



Why adblockers block ads

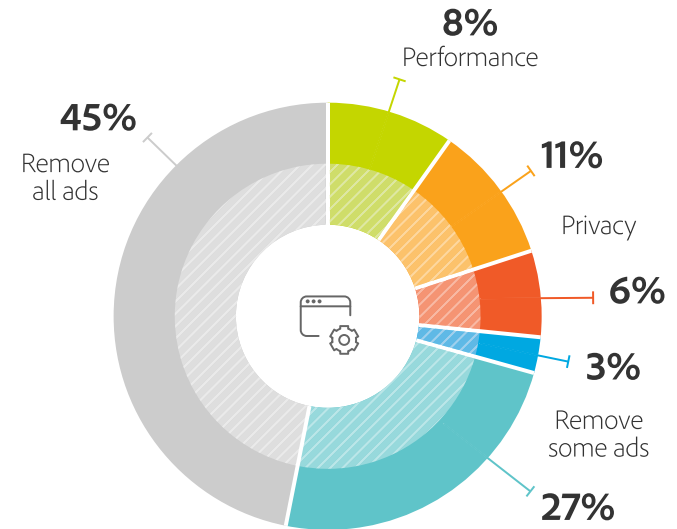
Adblock users express a strong dislike of advertisements that interrupt their ability to consume intended content.

The findings

- In our survey almost half (**45%**) of adblock users expressed a complete lack of desire to view any advertising and wanted as many ads as possible removed from websites.
- **17%** of respondents cited that privacy concerns were the reason for using an adblocking plugin.
- **30%** of current adblock users were open to some types of advertising. Intrusive ad formats were the key reason why they chose to block ads.

The opportunity

25% of adblockers installed an adblock plug-in due to concerns over performance and privacy. An additional **30%** use adblocking in order to remove a subset of specific advertising. Marketers can listen to these users and tailor an appropriate advertising experience for them, without compromising their enjoyment of the content.



What was your primary, original reason for installing adblock software?

TO IMPROVE MY COMPUTER'S SPEED, BANDWIDTH OR BATTERY LIFE
TO PREVENT THRID PARTY COOKIE TRACKING
TO REMOVE ADS THAT SEEM TO KNOW WHAT WEBSITES I VISIT
TO REMOVE ADS ON A PARTICULAR WEBSITE
TO REMOVE ADS THAT IF OUND ESPECIALLY ANNOYING
TO REMOVE ADS AS MANY ADS AS POSSIBLE FROM ALL WEBSITES

Adblocking user attitudes to different ad formats

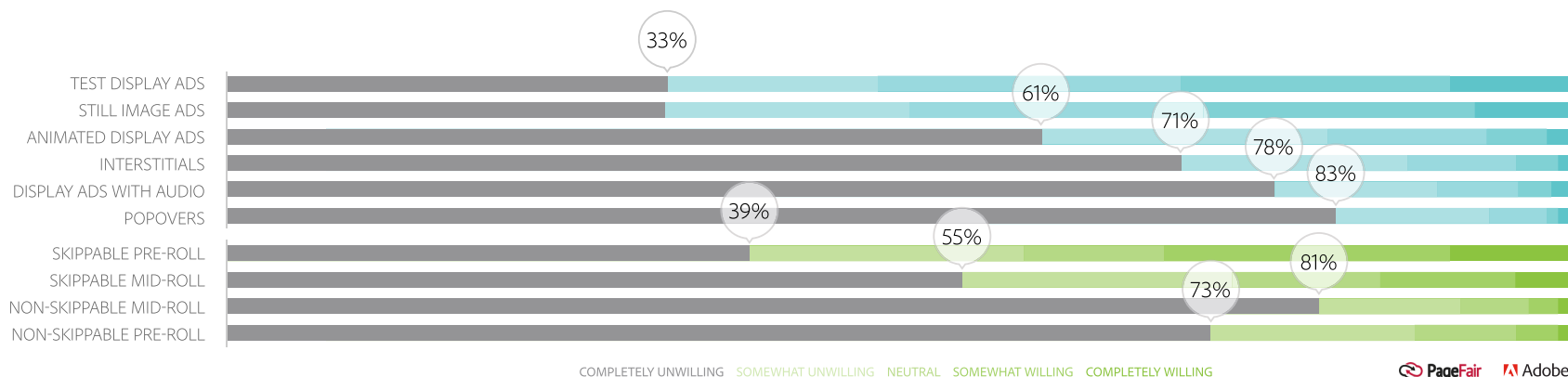
The willingness of adblocking users to view advertisements varies heavily on the type of ad.

The findings

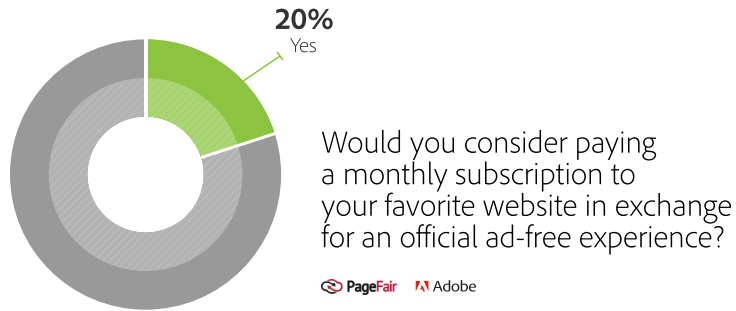
- **67%** of adblockers expressed **some willingness** to view text and still image ads.
- According to PageFair data, less than 1% of adblockers choose to opt out of PageFair's "acceptable ads".
- **61%** of adblockers on average are **completely unwilling** to receive advertisements packaged with the content they consume.

The opportunity

The majority of adblock users reject only distracting (animations, sounds) or intrusive (popover, interstitial, non-skippable video) ads. Adblock users can be respected by serving them non-intrusive ad formats, with solutions such as PageFair Ads.

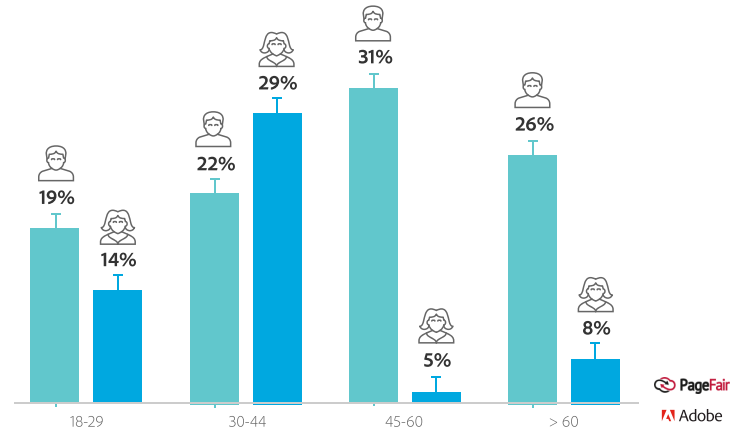


Premium vs. free ad models



The findings

- The age group with the highest adoption of ad blocking usage (millennials) was the least likely to pay for an ad-free subscription to content.
- Adblock users between the ages of 30 to 44, were on average more willing to pay for ad free content.
- Female adblock users between 45 and 60 were significantly less willing to pay than male users in the same age brackets.



The opportunity

There is a growing tension between "premium" and "free" content models on the web. Naturally, consumers prefer not to pay for content (as many as 80% in this study), but become irritated when shown advertisements. Publishers and advertisers need to do a better job of educating consumers about the costs of content creation to ensure that consumers think twice before blocking ads. At the same time, advertisers should constructively address consumer concerns about advertising that impairs the user experience and privacy.

What does the future hold?

Aging millennials will drive further mainstream adoption.

Adblocking is popular among people who have grown up with web browsers and who understand how to install an extension. The 18-29 year old adblockers will enter their thirties as adblockers, and be replaced by younger users who have been adblocking for years. This 13-17 year old cohort are already heavy adblockers. The number using adblocking will intensify as they grow older and have more opportunities to learn about adblocking from friends.

Adblock is set to go mobile.

Adblocking on mobile is currently negligible, as it requires the user to install a new browser (e.g., Firefox for Android), or gain root access to install a non-approved app. Multiple parties (including leading desktop adblock plugins) are now working to make adblocking easier on mobile. On mobile it may also provide for more efficient screen, battery and bandwidth usage. If successful, mobile adblocking could become a killer app.

What can be done?

The majority of adblock users do not object to advertising in principle. They are acting out against a number of ad formats that make it harder for them to access content. Many adblock users also cite practical or privacy reasons for adopting adblock. There is an opportunity to acknowledge all these concerns with advertising that respects the user's privacy and hard-earned attention.

PageFair allows publishers to display acceptable ads to their adblock visitors. We are working to create a sustainable relationship between publishers and their adblocking audiences. PageFair Ads don't need to shout, and give hardline adblockers the choice to opt-out. PageFair Ads have an opt-out rate less than 1% and a CTR comparable with regular advertising.

Adobe is working with numerous industry groups, including the IAB, to address the future of the cookie, consumer privacy concerns, and ad delivery. We are exploring different approaches to optimize ad delivery that balance consumer expectations with the business imperatives of advertisers, programmers and pay-TV providers.

Background

What is adblocking?

Adblock plugins act like a firewall between the web browser and all known ad servers. Most ads are blocked by open-source web browser plugins, installed by end users. The database of blocked ad servers is curated by a large and active open source community. The most popular adblock plugins are “Adblock Plus” and “Adblock”. Once installed, these plugins automatically block ads on all websites and are effective against nearly all ad formats.

About PageFair

PageFair is the leader in adblock solutions for website publishers. PageFair Analytics is used by publishers to understand their exposure to adblocking and measure lost revenue. PageFair Ads is an advertising platform for adblockers. PageFair Ads are endorsed by the leading adblock plugin, Adblock Plus, and are specially designed to be acceptable to adblock users.

Find out more at pagefair.com and follow [@pagefair](https://twitter.com/pagefair).

About Adobe Primetime

Adobe Primetime brings TV to every IP-connected screen. It gives programmers and operators modular capabilities to stream, protect, analyze, and monetize video across desktops and devices. Finally, you can profitably broadcast live, linear, and video-on-demand programming everywhere.

Find out more at adobe.com/primetime and follow [@AdobePrimetime](https://twitter.com/AdobePrimetime).

Methodology

Adblock Monthly Active User, per-browser and per-region data were compiled from multiple sources. A key source was historical web analytics data about the number of downloads of the Easylist blocklist, gathered by PageFair for the purpose of this report. All major adblock plugins regularly download an updated copy of this blocklist. This data was used as follows:

1. The number of downloads of Easylist between 14 April 2009 - 29 July 2014 was extracted.
2. The frequency at which adblock plugins download Easylist changed several times. These were changes researched in the Easylist version control system, and the changes to the update interval were used to normalize the download data.
3. Historical daily and weekly active user counts from the Chrome and Firefox extension marketplaces were obtained for Adblock Plus.
4. The daily and weekly active user counts were normalized in Monthly Active Users.
5. The Easylist web analytics data also provided download counts broken down by plugin. The ratios of these downloads were then used to estimate the Monthly Active Users of all other major adblock plugins.
6. The historical information on the Monthly Active Users for each major adblock plugin was combined to produce a historical growth chart, as well as a comparison of growth by browser.
7. The ratio of Easylist downloads to Monthly Active Users was combined with the number of Easylist downloads per-country to estimate the number of adblock users in each country. This was then compared against global census data to estimate adblock penetration in each country.

Proprietary information on the web traffic measured by PageFair was also contributed to establish adblock penetration on each browser. This data reflects adblock usage on sites using PageFair Analytics to monitor their adblocking levels. These sites are skewed towards publishers in Europe and North America.

Survey information was combined from two sources. A preliminary survey was conducted by Upfront Analytics of their US market research panel. A larger survey was conducted using the SurveyMonkey research panel, targeted to US internet users. The data presented in this report is the SurveyMonkey data, with one exception. SurveyMonkey did not provide any responses for people under 18 years. Upfront Analytics provided a reasonable sample in this age group, and their results in all other age groups closely matched those from SurveyMonkey. We therefore included the adblocking rates for the Upfront Analytics' 13-17 age group to better illustrate the pattern of adblocking among young internet users.

Tables

Browser Share

	3/1/08	4/1/08	5/1/08	6/1/08	7/1/08	8/1/08	9/1/08	10/1/08	11/1/08	12/1/08	1/1/09	2/1/09	3/1/09
Microsoft IE	0.785300669	0.789118492	0.782643165	0.773714625	0.772199262	0.766823695	0.759670358	0.756030792	0.74304426	0.733910954	0.734786425	0.728494361	0.723636983
Google Chrome + Android	0	0	0	0	0	0	0	0	0.008237523	0.011623046	0.018412129	0.021043081	0.023878347
	4/1/09	5/1/09	6/1/09	7/1/09	8/1/09	9/1/09	10/1/09	11/1/09	12/1/09	1/1/10	2/1/10	3/1/10	4/1/10
Microsoft IE	0.719486289	0.714223574	0.711758105	0.703152094	0.702241826	0.697265739	0.692608812	0.691837258	0.685114791	0.676906239	0.66998495	0.658470279	0.651673225
Google Chrome + Android	0.02810211	0.034077766	0.037718787	0.040648028	0.043965152	0.047019478	0.050961629	0.055268171	0.06076194	0.066519225	0.069179945	0.079198014	0.085755944
	5/1/10	6/1/10	7/1/10	8/1/10	9/1/10	10/1/10	11/1/10	12/1/10	1/1/11	2/1/11	3/1/11	4/1/11	5/1/11
Microsoft IE	0.640486933	0.635496852	0.628226457	0.622640109	0.619688034	0.614448584	0.608299294	0.591760882	0.587753352	0.584784342	0.576623486	0.566846746	0.562117305
Google Chrome + Android	0.089959474	0.09341596	0.097038453	0.100755181	0.105795448	0.109859443	0.114774021	0.122346998	0.12876168	0.133258917	0.137179668	0.143266715	0.148734402
	6/1/11	7/1/11	8/1/11	9/1/11	10/1/11	11/1/11	12/1/11	1/1/12	2/1/12	3/1/12	4/1/12	5/1/12	6/1/12
Microsoft IE	0.555579773	0.546958994	0.536157665	0.526299429	0.513304027	0.503726209	0.489173322	0.477580887	0.470428229	0.466618422	0.452724456	0.446152885	0.436506095
Google Chrome + Android	0.15592696	0.161247175	0.171403248	0.177468017	0.184744551	0.191234889	0.200701453	0.205668922	0.208821353	0.211218068	0.215044864	0.21288766	0.217117375
	7/1/12	8/1/12	9/1/12	10/1/12	11/1/12	12/1/12	1/1/13	2/1/13	3/1/13	4/1/13	5/1/13	6/1/13	7/1/13
Microsoft IE	0.42672431	0.413818025	0.390670749	0.381736591	0.373977622	0.356362116	0.355717217	0.341146963	0.327316086	0.312011097	0.300007518	0.288957988	0.282057516
Google Chrome + Android	0.221345843	0.223578928	0.228191546	0.23301759	0.23592255	0.239294613	0.243120117	0.258199844	0.263956594	0.273008947	0.284021875	0.294214404	0.303454703
	8/1/13	9/1/13	10/1/13	11/1/13	12/1/13	1/1/14	2/1/14	3/1/14	4/1/14	5/1/14			
Microsoft IE	0.268181082	0.260758236	0.261559368	0.251266965	0.235627625	0.232371472	0.22674935	0.219333625	0.214361728	0.20358891			
Google Chrome + Android	0.313224925	0.32196277	0.332398223	0.355024667	0.361334645	0.365616003	0.372179988	0.379558287	0.383842528	0.396950588			

Tables

Percent Share of Adblock Growth

	8/2/13	9/1/13	10/1/13	11/1/13	12/1/13	1/1/14	2/1/14	3/1/14	4/1/14	5/1/14	6/1/14	7/1/14
Greece	1	1.17542634	1.311581066	1.409403505	1.476032623	1.601431179	1.439806531	1.965544428	2.024314805	2.321591885	2.325191885	2.338997808
China	1	0.936828702	0.943847704	0.935375787	0.935652233	0.796009896	0.709849959	1.108551541	1.519039184	1.844125827	1.87391178	2.078981409
Spain	1	1.163884305	1.334046271	1.394025895	1.415370869	1.483460782	1.299240724	1.733893256	1.706850811	1.915890333	1.854050232	1.812749337
Colombia	1	1.017410534	1.122209187	1.159860425	1.081804345	1.108221086	1.068912536	1.447505568	1.473338628	1.695937267	1.592799017	1.795852908
Poland	1	1.147276026	1.304837839	1.341784462	1.330369127	1.376813321	1.179889592	1.570394029	1.565408183	1.735542714	1.725469644	1.721182041
Japan	1	1.018670904	1.130213983	1.126207032	1.172269651	1.165506892	1.003081724	1.324058257	1.354523463	1.517622607	1.523573982	1.622076443
Italy	1	1.171288544	1.257717224	1.273511775	1.278816196	1.31819062	1.130950908	1.485791163	1.48866111	1.618070233	1.58280988	1.610823228

How willing are you to receive:

	completely unwilling	somewhat unwilling	neutral	somewhat willing	completely willing
text display ads	0.333333333	0.15308642	0.224691358	0.2	0.088888889
static display ads	0.328395062	0.180246914	0.217283951	0.202469136	0.071604938
rich media display ads	0.607407407	0.212345679	0.118518519	0.044444444	0.017283951
ads that play sounds	0.780246914	0.120987654	0.059259259	0.027160494	0.012345679
popovers	0.827160494	0.113580247	0.041975309	0.007407407	0.009876543
interstitial ads	0.711111111	0.167901235	0.081481481	0.02962963	0.009876543
skippable pre-roll	0.392592593	0.2	0.10617284	0.212345679	0.088888889
non-skippable pre-roll	0.733333333	0.150617284	0.07654321	0.032098765	0.007407407
skippable mid-roll	0.550617284	0.197530864	0.111111111	0.098765432	0.041975309
non-skippable mid-roll	0.814814815	0.103703704	0.049382716	0.022222222	0.009876543

Percent of Internet Users That Use Adblocking by Country

Country	Q2 2014 Average
Poland	0.28625096
Greece	0.245368387
Sweden	0.21630252
Denmark	0.211975641
Canada	0.196084775
Australia	0.183689005
Portugal	0.162839483
Finland	0.162713138
United Kingdom	0.144991006
Spain	0.138891314