The State of Mobile Ad-Blocking in 2017

An examination of the current impact and future potential of mobile ad-blocking in the USA

globalwebindex

INTRODUCTION

In this special report, GlobalWebIndex takes a deep-dive into the issue of mobile ad-blocking in the USA. To date, the mobile ad-blocking trend has been primarily an Asian phenomenon. Although large numbers of digital consumers across North America and Europe have been installing ad-blocker software on their desktops, usage of mobile ad-blockers in these regions has lagged notably behind, while awareness of the availability and functionalities of mobile ad-blockers has been similarly limited.

In this report, utilizing the results of a special GlobalWebIndex study among internet device owners in the USA, we examine the current state of mobile ad-blocking in the USA and investigate whether the conditions exist for this trend to become mainstream among US digital consumers. In particular, we focus on:

▪ Who are America's current ad-blocker users, which devices are they using and what are their motivations for using these tools?

▪ What is the level of awareness among US digital consumers concerning the availability and benefits of mobile ad-blocking software? And what factors are influencing this level of awareness?

▪ How do smartphone owners feel about their current mobile internet browser and how common is multi-browser usage on mobile?

▪ What are the attitudes of US digital consumers, both those who block ads and those who don't, towards ad-blocking capabilities, online advertising and the ad-blocking industry?

▪ How do US ad-blocker users differ from non-users in their engagement with various forms of media?

NOTES ON METHODOLOGY

Each year, GWI interviews over 350,000 internet users as part of its Core research program – asking them a wide range of questions about their lives, lifestyles and digital behaviors. Unless otherwise stated, all the data presented in this report was taken from a be-spoke study which re-contacted 1,011 of GWI's Core respondents, all of whom were internet device owners aged 16-64. The survey was conducted to understand the reasons why digital consumers are using ad-blocking software and the attitudes of internet users towards ad-blocking and online advertising, with a special focus on ad-blocking on mobile and the awareness of this functionality.

The study was commissioned by EYEO, creators of AdBlock Plus. The survey was written by GlobalWebIndex, in consultation with EYEO, and scripted in-house by GWI. The survey was delivered to the panel in an online format, with each respondent being compensated, at an agreed rate, for their time. The survey took approximately 5 minutes for each respondent to complete. This report has been written, designed and produced by the GWI Custom Research team and the GWI Trends team.

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Key Insights

• **Despite mobiles being one of the most commonly owned devices in the US, they lag significantly behind PCs and laptops as a device used for ad-blocking** — only 22% of current ad-blocker users are blocking ads on their smartphones (meaning only 15% of US internet device owners block ads on mobile).

• **Only half of internet device owners in the USA are even aware that they can block ads on their mobile.** And if we look only at those who have not blocked ads on a mobile, **more than 6 in 10 state that they did not know that it was possible to do so.**

• **Ad-frustration is the primary driver behind current ad-blocking uptake in the US.** Ad-blocker users are most likely to state that ads are intrusive, they are irrelevant, or that there are simply too many of them.

• **There is plenty of evidence indicating an underlying demand for mobile ad-blocking tools,** and as such there is likely to be a substantial addressable market should awareness of these tools increase. For example, 1 in 3 smartphone owners say that they see too many ads when browsing the mobile internet and a large section of this group are currently unaware of mobile ad-blocking.

• **The need to download an additional browser in order to be able to block ads (particularly on Android devices) is slowing mobile ad-blocking adoption.** Only 14% of smartphone owners in the USA say that they use an additional browser.

• **Brand familiarity (or lack thereof) stands out as another potential barrier to mobile ad-blocking uptake.** Smartphone owners say they are most likely to choose their mobile browser because they knew the brand, and over 3 in 4 of those who are aware of the existence of mobile ad-blocking are unable to name an app or a browser which allows users to block ads on mobile.

• **There remains little willingness or recognition on the part of many consumers to accept that ads – even if they are respectful – are at the core of free content online.** 1 in 2 smartphone owners in the USA state that they would prefer to block all ads on their mobile device. **However, it is still one fifth of smartphone owners who say they don't mind seeing ads on their mobile if they are respectful,** while a similar number say they are willing to donate money to support websites.

PROFILING AMERICA'S AD-BLOCKER USERS

Who are the USA's current ad-blockers, what motivates them to block ads and what devices are they using?

The Demographics of the Ad-Blocker Audience

A major catalyst in the development of mobile ad-blocking came in 2015, following Apple's announcement that the new iOS 9 would allow users to download ad-blocking extensions through the mobile Safari browser. The hype surrounding this event inevitably raised the profile of mobile ad-blocking and led many to wonder whether the trend would quickly catch on, especially in the West. Fast-forward to 2017, and it's clear that **mobile ad-blocking for the most part remains an Asian phenomenon.** The importance attached to more traditional internet devices such as PCs, laptops and desktops in the US compared to smartphones has been a key factor in the slow uptake of mobile ad-blocking in this market.

Globally, ad-blocking on any device is still a trend which skews towards certain demographics, and the US is no exception – **respondents who report having used an ad-blocker in the last month see higher representation among the 25-34 age group. This group is also notably more likely to be male** (almost 6 in 10 are).

DEMOGRAPHICS OF AD-BLOCKER USERS

% of US Ad-Blocker Users who are...

Age/Gender	Percentage
16-24	17%
25-34	26%
35-44	21%
45-54	17%
55-64	19%
Male	58%
Female	42%
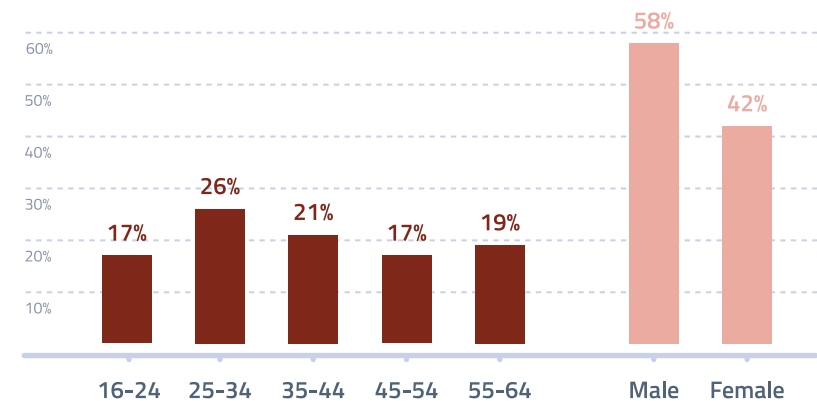
Question: Have you ever used an ad blocker, on any device, to stop websites from displaying advertisements when you visit them? Yes - I have used an ad blocker in the past month
Source: GlobalWebIndex 21st April-4th May 2017
Base: 427 US Internet Users who have blocked an ad on any device in the past month aged 16-64
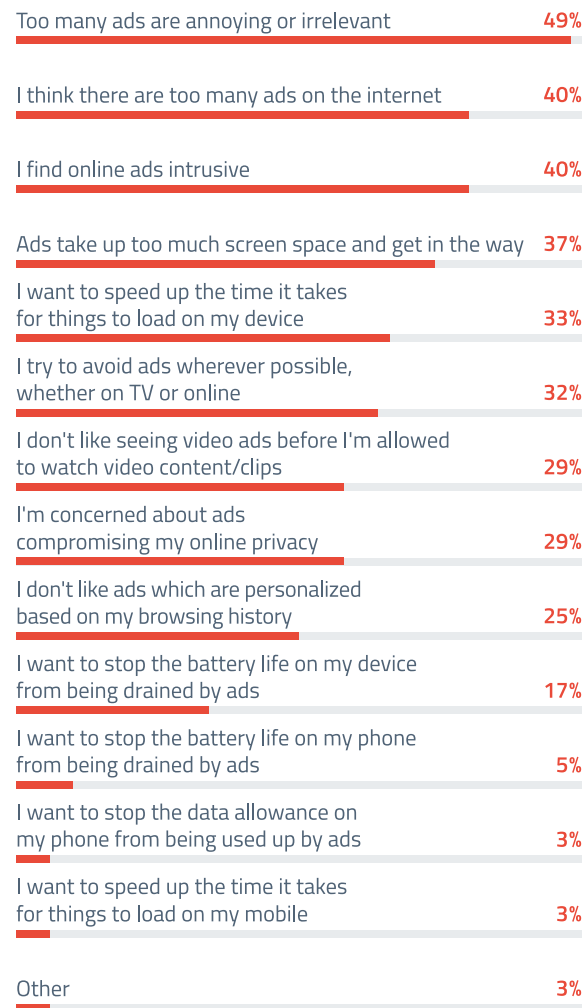
The Motivations Behind Ad-Blocking

It's ad-frustration which is the biggest driver of ad-blocking uptake in the US. Respondents were most likely to state that **ad-overload, irrelevant content, intrusive formats and slow page load speeds motivate them to deploy an ad-blocker.** Privacy concerns are certainly not insignificant, with around 3 in 10 US Ad-Blockers stating that they are concerned about ads compromising their online privacy, and 1 in 4 saying they don't like ads which are personalized based on their browsing history. But **most of all it's poor user experience which is driving this resistance to ads.**

This becomes abundantly clear when we compare those who have blocked an ad in the last month with those who have previously blocked an ad but not in the past month. Overall, **those who have used an ad-blocker in the past month display a remarkably stronger inclination to resist ads,** with as many as 1 in 3 recent ad-blockers saying they try to avoid ads wherever possible, whether on TV or online, dropping to 27% among previous users of ad-blockers.

Age inevitably plays a part here, as the previous users of ad-blockers typically fall within the 45-64 age group, and although older US internet users tend to exhibit stronger privacy concerns online, it's pretty clear that **younger consumers are more willing (and arguably more digitally capable) to take control of their online experience.**

AD-BLOCKING MOTIVATIONS % of US Ad-Blocker Users who say they use ad-blockers for the following reasons

Too many ads are annoying or irrelevant	**49%**
I think there are too many ads on the internet	**40%**
I find online ads intrusive	**40%**
Ads take up too much screen space and get in the way	**37%**
I want to speed up the time it takes for things to load on my device	**33%**
I try to avoid ads wherever possible, whether on TV or online	**32%**
I don't like seeing video ads before I'm allowed to watch video content/clips	**29%**
I'm concerned about ads compromising my online privacy	**29%**
I don't like ads which are personalized based on my browsing history	**25%**
I want to stop the battery life on my device from being drained by ads	**17%**
I want to stop the battery life on my phone from being drained by ads	**5%**
I want to stop the data allowance on my phone from being used up by ads	**3%**
I want to speed up the time it takes for things to load on my mobile	**3%**
Other	**3%**

GlobalWebIndex segments ad-blockers according to the reasons they cite for ad-blocking (definitions of each segment can be found **here**). These segments reiterate the trend we saw earlier: **those blocking ads in the US are most likely to be "frustrated", blocking ads because they take up too much screen space, are annoying, intrusive or because there's simply too many of them.** Crucially, this is the top motivational segment for each age group, with 40%+ in each age bracket among ad-blocker users falling into this category.
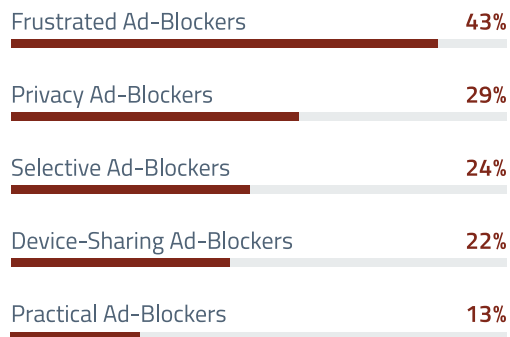
But what this also shows us is that **ad-blocker usage does not necessarily equate to zero exposure to ads; rather, multi-device usage, whitelisting and selective usage of blocking browsers all mean that people blocking ads in some contexts can still be exposed to them in others.** Just as ad-blocking uptake is predominantly clustered around younger internet users, the same is largely true among the "Selective" ad-blocker group (those who have blocked ads in the past month but who say they have clicked on an online ad or that they discover brands/products through ads seen online or ads seen before online videos/TV shows start to play), with as many as 1 in 3 25-34 ad-

Ad-Blocking by Device

blocker users being characterized as a "Selective" ad-blocker. If we were to look at the crossover between these two segments among those ad-blocker users, we see that **it's a significant 1 in 3 among the "Frustrated" segment who also fall within the "Selective" one.**

AD-BLOCKING SEGMENTATION
% of US Ad-Blocker Users who can be classed as the following

Frustrated Ad-Blockers   **43%**

Privacy Ad-Blockers   **29%**

Selective Ad-Blockers   **24%**

Device-Sharing Ad-Blockers   **22%**

Practical Ad-Blockers   **13%**

Question: Please could you tell us your main reasons for blocking ads while you use the internet?
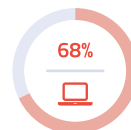**Source:** GlobalWebIndex 21st April-4th May 2017
Base: 427 US Internet Users who have blocked an ad on any device in the past month aged 16-64

GWI's long-term data shows that **time spent online per day via mobile among US internet users has more than doubled since 2012 to its current standing of just over two hours, and mobile browsing has been a key area in which user experience is supposed to have suffered due to the prevalence of irresponsible ads.** However, the results of this special study show that **the rates for mobile ad-blocking lag significantly behind that of other devices** (aside from tablets) in the USA. **22% of the USA's current ad-blocker users say they blocked ads on a mobile in the last month but 68% say they use laptops to block ads, while 51% are using desktop PCs.** That translates to 15% of US internet device owners who are blocking ads on mobile.
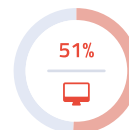
Mobile's comparatively low scores for this metric are particularly interesting given that just 3 percentage-points separate laptops and mobiles in terms of ownership among ad-blockers (81% have a laptop vs. 78% who have a mobile). From this perspective, **mobile exhibits the biggest disparity between those who own the device and those who choose to block ads on it,** whereas PCs/desktops and laptops display the smallest gaps. So, **the bulk of US ad-blocking is taking place on more traditional internet devices such as desktops PCs and laptops.**

However, as we will see, the conditions are set for mobile to take its place in this arena too, provided some fundamental road-blocks, which have so far reserved mobile ad-blocking to the fringes, are removed.

DEVICES USED FOR AD-BLOCKING
% who say they have used an ad-blocker on the following devices in the last month

Among US Ad-Blocker Users
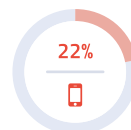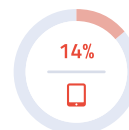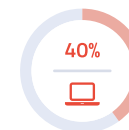
68% Laptop

51% PC/Desktop
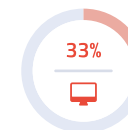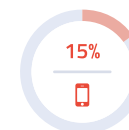
22% Mobile

14% Tablet

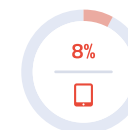**Among US Internet Device Owners**

40% Laptop

33% PC/Desktop

15% Mobile

8% Tablet

Question: On which of the following devices have you used an ad blocker?
Source: GlobalWebIndex 21st April-4th May 2017
Base: 427 US Internet Users who have blocked an ad on any device in the past month aged 16-64 // 1,011 US Internet Users who own a smartphone, laptop, desktop PC or tablet aged 16-64

CONSUMER AWARENESS OF MOBILE AD-BLOCKING

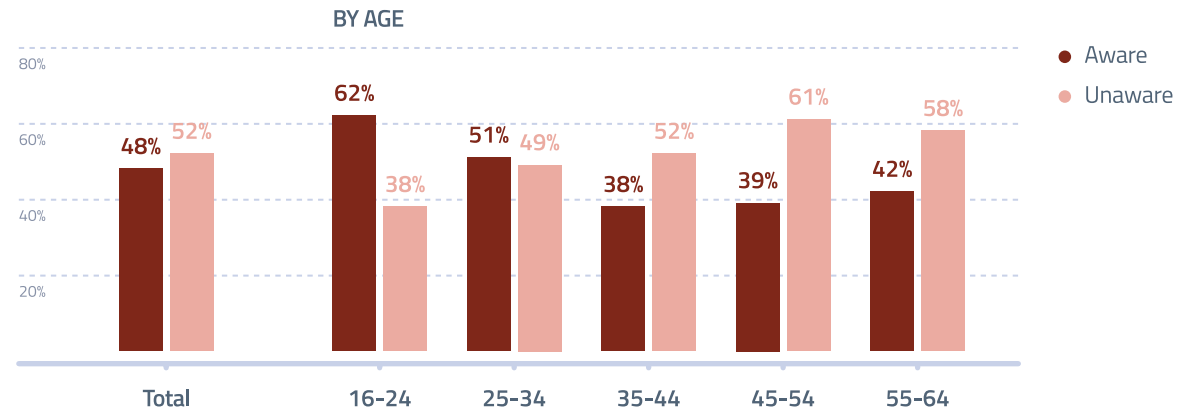How many US internet users are aware of mobile ad-blocking?

Mobile Ad-Blocker Awareness

The large discrepancy between those who own a mobile and those who block ads on the device is the result of relatively low awareness of mobile ad-blocking in the US. Among internet device owners, it's slightly less than half who say they are aware that they can block ads on a mobile. And if we look only at respondents who have not blocked ads on a mobile, **more than 6 in 10 state that they did not know that it was possible to block ads via their smartphone.**

It's here where we also see a correlation with age – it's the youngest groups who are the most aware of ad-blocking. Equally as important here is that **women are a lot less likely than men to be aware of mobile ad-blocking,** with almost 7 in 10 females surveyed in this study reporting that they are unaware of these tools. Men, on the other hand, are evenly split between those who are aware and those who are unaware of mobile ad-blocking software.

AWARENESS OF MOBILE AD-BLOCKERS

% of internet device owners who say they are aware / unaware of mobile ad-blocking

BY AGE

● Aware
● Unaware

	Total	16-24	25-34	35-44	45-54	55-64
Aware	48%	62%	51%	38%	39%	42%
Unaware	52%	38%	49%	52%	61%	58%

Question: Did you know that you can block ads on your mobile device?
Source: GlobalWebIndex 21st April-4th May 2017
Base: 1,011 US Internet Users who own a smartphone, laptop, desktop PC or tablet aged 16-64

Awareness of the Benefits of Mobile Ad-Blocking

Among those who *have* used a mobile ad-blocker in the past month, respondents were asked whether they could recall the name of the software they employ to block ads on their smartphone. Even here, just 1 in 2 were able to name which mobile ad-blocker they made use of, showing that **regardless of whether someone has or has not blocked an ad on their smartphone in the past month, there still exists confusion and a visible lack of awareness about the ad-blocking industry.** Much of **the issue**

here stems from little familiarity with ad-blocker brand names, something which is highly likely to be holding back uptake of mobile ad-blocking in the US.

This situation is confirmed by the limited familiarity with mobile ad-blocker brands among those who are aware of these tools but do not yet use them – **over 3 in 4 from this group are unable to name an app or a browser which allows users to block ads on mobile.**

US internet users may be largely uninformed about mobile ad-blocker brands, but **among those who are knowledgeable about the possibility of mobile ad-blocking, the majority are aware of the benefits involved.** What's more, this is also true of those who are aware of these tools but have not used one themselves. Among both of these groups, around **7 in 10 recognize that mobile ad-blockers prevent intrusive ads, and over half are aware of the online privacy benefits of employing these tools.** On the more practical side of things, around 1 in 2 from both audiences recognize that these tools are able to reduce mobile data usage online and save battery on their mobile device.

With all this considered, **education is key – for mobile ad-blocking to enter the mainstream in the US, more needs to be done to inform the consumer of mobile ad-blocking brand names to give them the choice of finding these tools online.**

AWARENESS OF MOBILE AD-BLOCKER BRANDS AMONG USERS

% of US Mobile Ad-Blocker Users who are able to name their ad-blocker on their mobile
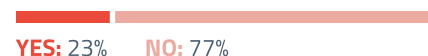
YES: 50%   **NO:** 50%

Question: You stated that you have used an ad blocker on a mobile device. Can you name this ad blocker? If yes, please write the name in the text box below. | **Source:** GlobalWebIndex 21st April-4th May 2017 | **Base:** 132 US Internet Users who have used a mobile ad-blocker in the last month aged 16-64

MOBILE AD-BLOCKER BRAND RECOGNITION AMONG NON-USERS

% of Ad-Blocker non-users (who are aware of mobile ad-blocking) who are able to name a mobile ad-blocker brand
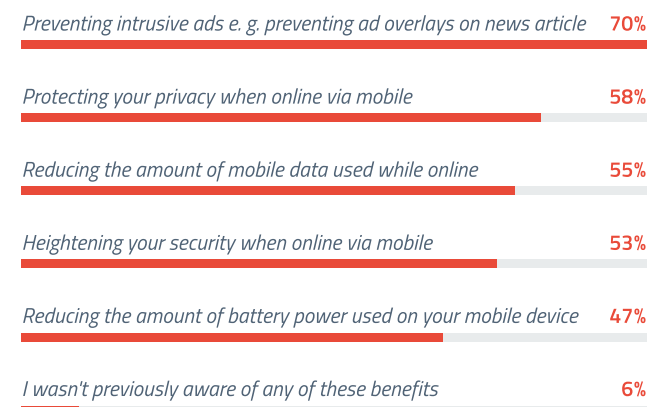
YES: 23%   **NO:** 77%

Question: Can you name an app or browser that allows users to block ads on a mobile device? If yes, please write the name of an app or browser in the text box below. | **Source:** GlobalWebIndex 21st April-4th May 2017 | **Base:** 298 US Internet Users who are aware of mobile ad-blocking but have not used a mobile ad-blocker aged 16-64

AWARENESS OF THE BENEFITS OF MOBILE AD-BLOCKERS

% who are aware of mobile ad-blocking who say the following are the benefits of using a mobile ad-blocker

Preventing intrusive ads e. g. preventing ad overlays on news article	70%
Protecting your privacy when online via mobile	58%
Reducing the amount of mobile data used while online	55%
Heightening your security when online via mobile	53%
Reducing the amount of battery power used on your mobile device	47%
I wasn't previously aware of any of these benefits	6%

Question: Of the following reasons/ benefits for using mobile ad blockers, which are you already aware of? **Source:** GlobalWebIndex 21st April-4th May 2017 **Base:** 430 US Internet Users who have blocked an ad on their mobile or are aware of mobile ad-blocking aged 16-64

MULTI-BROWSER
USAGE ON MOBILE

How common is multi-browser usage and is this impacting mobile ad-blocking adoption?

The Popularity of Multi-Browser Usage

As it stands, **a key barrier to mobile ad-blocking adoption stems from the need to download an additional browser in order to be able to block ads.** Android is a particular culprit here, with many handset developers now using Google Chrome as the default browser (a browser that does not – yet – support third-party extensions allowing for ad-blockers). In contrast, iOS has supported these add-ons for some time now (although even for iOS, this requires users to own a newer mobile handset capable of running iOS 9 or above). This may also be impeding awareness of mobile ad-blockers in the US. Some of the strongest evidence for this comes from the fact that **there is little propensity to venture beyond the default browser to acquire the benefits of one which supports ad-blocking – 35% of smartphone owners in the study state that they use their default browser and have never considered using an additional one.** Perhaps more striking, however, is that just 14% of smartphone owners in the study declared that they use an additional browser.

ONLY 14% OF SMARTPHONE OWNERS USE MULTIPLE BROWSERS

This is undoubtedly a crucial obstacle to overcome in driving up mobile ad-blocking in the US (2 in
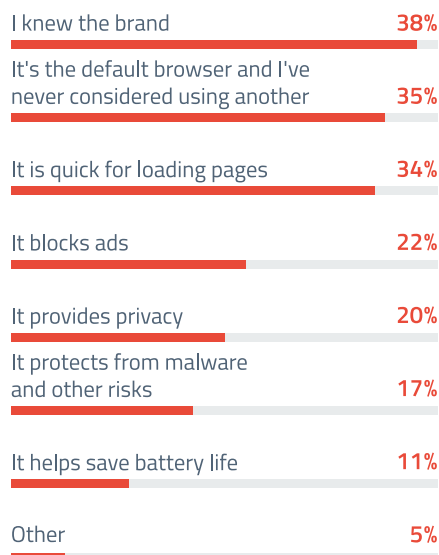
3 of those who have not considered using an additional browser are unaware of mobile ad-blocking). Recent rumors of Google planning to introduce ad-blocker extensions within its Chrome mobile browser could certainly lead to an uplift in mobile ad-blocking in this market, especially among Android users, though it remains to be seen how strict Chrome's ad-blocking will be. And even here there's no guarantee – **over 6 in 10 Samsung handset owners among our respondents remain unaware of mobile ad-blocking, yet Samsung rolled out third-party content blocking capabilities via its default browser at the beginning of 2016.**

Brand familiarity (or lack thereof) again stands out as a potential barrier to adoption too – respondents were most likely to choose their mobile browser if they knew the brand, something which as we saw earlier is limited in the mobile ad-blocking space within the US. Further down the list we do see decent figures for choosing mobile browsers based upon the benefits available when using a mobile ad-blocker. As such, **there's clearly a willingness on the part of the consumer to take action to better their mobile browsing experience,** so it's fairly safe to assume this should apply to the wider US online population should awareness of these tools increase.

The Perceived Benefits of Multi-Browser Usage

REASONS FOR USING CURRENT BROWSER

% of US smartphone owners who say the following are reasons for using their current browser

I knew the brand	**38%**
It's the default browser and I've never considered using another	**35%**
It is quick for loading pages	**34%**
It blocks ads	**22%**
It provides privacy	**20%**
It protects from malware and other risks	**17%**
It helps save battery life	**11%**
Other	**5%**

Question: What are the main reasons for choosing your current mobile Internet browser (e.g. Chrome, Safari etc)?
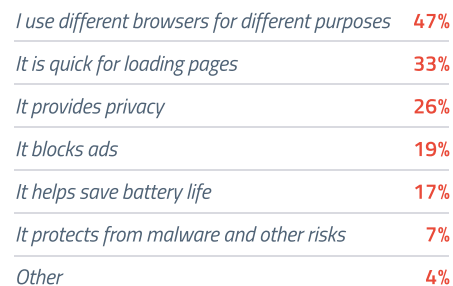**Source:** GlobalWebIndex 21st April-4th May 2017
Base: 782 US Internet Users who own a smartphone aged 16-64

Turning our attention to those who have downloaded another mobile browser, this group is most likely to say that they use different browsers for different purposes. But if we were to isolate the top two specific motivations, **it's practicality (page load times) and privacy which feature most prominently.** Completing the top four options is choosing an additional browser as it blocks ads, yet it's only 1 in 4 respondents who selected this option.

When we asked smartphone owners whether they have experienced any problems while using a mobile browser without an ad-blocker, they were most likely to say that they have not encountered any issues (35% say this). That said, **among those who selected this option, 6 in 10 state that they were previously unaware of mobile ad-blocking, meaning that the vast majority**

would have been uninformed of the benefits of a mobile web browsing experience when using an ad-blocker.

1 in 3 respondents also say that they see too many ads when using a mobile browser without an ad-blocker. Interestingly, of these 1 in 3 respondents, more than 60% of them also say that they too were previously unaware of mobile ad-blocking. This means that **there is clearly an underlying demand for a mobile browsing experience free of irrelevant, intrusive and irresponsible ads, even if these consumers are not overtly aware that this is a possibility.** Further evidence of this comes from slightly lower down our list, where 28% say that pages take forever to load, and 23% state that they are worried about their online privacy or malware risks.

REASONS FOR USING AN ADDITIONAL BROWSER

% of multi-browser users who say the following are reasons for using an additional browser

I use different browsers for different purposes	**47%**
It is quick for loading pages	**33%**
It provides privacy	**26%**
It blocks ads	**19%**
It helps save battery life	**17%**
It protects from malware and other risks	**7%**
Other	**4%**

Question: You said that you use an additional mobile browser, what are the main reasons for choosing your secondary browser? **Source:** GlobalWebIndex 21st April-4th May 2017 **Base:** 101 US Internet Users who use an additional browser aged 16-64

FRUSTATIONS WITH MOBILE INTERNET BROWSING

% of smartphone owners who say they have the following problems when mobile browsing without an ad-blocker

I have not experienced any problems	**35%**
I see too many ads	**33%**
Pages take forever to load	**28%**
I worry about my online privacy	**23%**
I'm worried about malware risks	**23%**
The battery life is usually challenging	**17%**
My data costs are always high	**8%**
Other	**2%**

Question: What problems, if any, have you experienced while browsing on your mobile device without an ad blocker? **Source:** GlobalWebIndex 21st April-4th May 2017 **Base:** 782 US Internet Users who own a smartphone aged 16-64

Consumer Attitudes Towards Ad-Blocking

As our data demonstrates, there is little willingness or recognition on the part of many consumers to accept that ads – even if they are respectful – are at the core of free content online. Among smartphone owners, 1 in 2 state that they would prefer to block all ads on their mobile device, making this the top option in our list. **But there are signs of a more accepting mindset here – at the other end of the scale, it may be a considerably smaller 1 in 5 who express that they don't mind seeing ads on their mobile if they are respectful, but this still amounts to a sizeable portion of the US online population.**
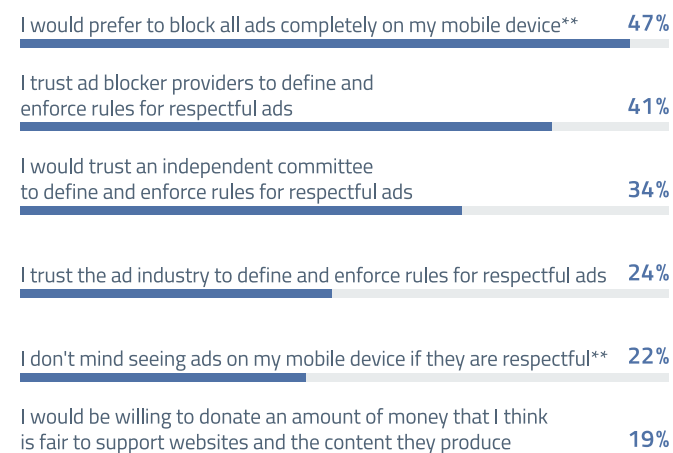
What's more, a fifth of respondents would be willing to donate an amount of money that they think is fair to support websites and the content they produce, and it's a similar figure who would also be willing to do this among those who prefer to block all ads on their mobile. Even so, **the gap between those who are completely ad-resistant, and those who are willing to accept responsible ads needs to be bridged. Again, education is key here.**

Consumers need to realize that there is a value exchange to be made, but in terms of which party decides the basis of this value exchange, respondents tend to trust ad-blocker providers. 41% of respondents in our survey feel that ad-blocker providers are best suited to define and enforce the rules of respectable ads, reflecting a widespread distrust of the ad industry among those who have been subject to poor user experiences as a result of ad-overload and irrelevant or intrusive ads. Elsewhere, it's 1 in 3 who would support an independent committee fulfilling this task, and 1 in

4 who desire the ad industry to define and enforce these rules (although there is a not insignificant degree of overlap between all three parties here). **Focusing specifically on those who do not want to see any ads on their mobile, this audience is 16% more likely than average to opt for an independent committee to oversee the definition of respectable ads (4 in 10 would).**

ATTITUDES TOWARDS AD-BLOCKING

% of smartphone owners who agree with the following statements

I would prefer to block all ads completely on my mobile device** **47%**

I trust ad blocker providers to define and
enforce rules for respectful ads **41%**

I would trust an independent committee
to define and enforce rules for respectful ads **34%**

I trust the ad industry to define and enforce rules for respectful ads **24%**

I don't mind seeing ads on my mobile device if they are respectful** **22%**

I would be willing to donate an amount of money that I think
is fair to support websites and the content they produce **19%**

***Only asked to smartphone owners*

Question: To what extent do you agree with the following statements about ads and ad blocking? Somewhat agree, Strongly agree **Source:** GlobalWebIndex 21st April-4th May 2017 **Base:** 1,011 US Internet Users who own a smartphone, laptop, desktop PC or tablet aged 16-64

When we isolate each of the three opposing viewpoints here, we see varying degrees of privacy, ad-frustration, and practicality concerns in how they prioritize the benefits of using a mobile ad-blocker. **For those who tend to trust the ad industry for this task (and to a certain extent those who would choose ad-blocker providers), we see a slightly bigger emphasis on privacy concerns for this metric.** Among those who would trust an independent committee, practicality (i.e. reducing the amount of mobile data used while online) sees a higher score compared to the other two groups. **For those who would opt for an ad-blocker provider, we see significantly stronger opinions for ad-blockers providing extra security, and particularly for ad-frustration.**
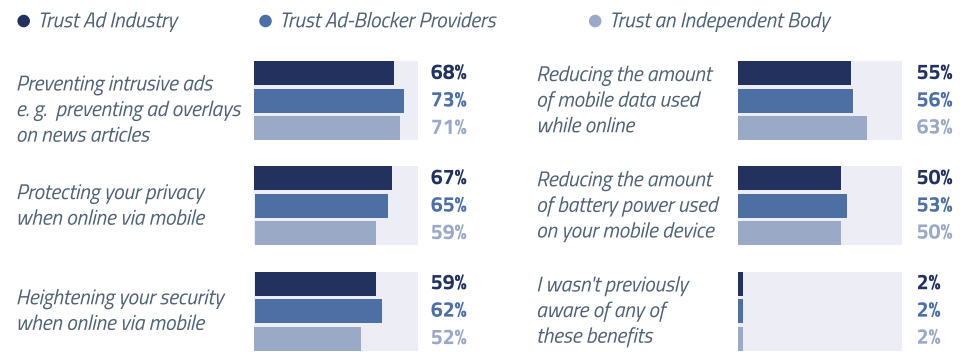
There's strong evidence to suggest that **irresponsible mobile advertising is causing poor user experiences while browsing on mobile, which in turn is deterring some users from using their mobile as a primary internet device.** A significant 4 in 10 respondents feel that ads are more annoying or more intrusive on mobile than they are on a desktop or laptop. **And among respondents who agree with both of these statements, 6 in 10 say that they are less likely to visit websites on their mobile than on their desktop/laptop.** Also relevant here is that 62% of this same group are unaware of mobile ad-blocking, meaning it's these users who could potentially benefit the most from education concerning mobile ad-blockers.

As we saw earlier, there are many who have little propensity to download an additional browser which may allow them to block ads on mobile, and something which is likely to be playing a part here are concerns over storage space on mobiles. **28% of respondents say they don't want to use the memory on their mobile for an ad-blocker, climbing to 37% among those who have never considered downloading another mobile browser.** Further evidence of a lack of awareness of mobile ad-blockers in the US stems from the fact that just 12% feel that it is easier to find ad-blockers for mobile than it is for desktops/laptops.

OPPOSING VIEWPOINTS

% of each group who say that mobile ad-blockers provide the following benefits

● *Trust Ad Industry* ● *Trust Ad-Blocker Providers* ● *Trust an Independent Body*

Preventing intrusive ads e. g. preventing ad overlays on news articles
- **68%**
- **73%**
- **71%**

Reducing the amount of mobile data used while online
- **55%**
- **56%**
- **63%**

Protecting your privacy when online via mobile
- **67%**
- **65%**
- **59%**

Reducing the amount of battery power used on your mobile device
- **50%**
- **53%**
- **50%**

Heightening your security when online via mobile
- **59%**
- **62%**
- **52%**

I wasn't previously aware of any of these benefits
- **2%**
- **2%**
- **2%**

Question: Of the following reasons/benefits for using mobile ad blockers, which are you already aware of?
Source: GlobalWebIndex 21st April-4th May 2017 |
Base: US Internet Users aged 16-64

ATTITUDES TOWARDS AD-BLOCKING II

% of device owners who agree with the following statements

Ads are more annoying on mobile than on desktop/laptop*	42%
I am less likely to visit websites on my mobile than on my desktop/laptop*	40%
Ads are more intrusive on a mobile than on a desktop/laptop*	40%
I don't want to use the memory (storage space) on my mobile for an ad blocker**	28%
The websites I visit on my mobile tend to have more ads than the sites I visit on my desktop/laptop*	21%
It is easier to find ad blockers for mobile than it is for desktop/laptop*	12%
I don't trust ad blockers for mobile**	11%

*Only asked to those who own either PC/Desktop or a laptop, and own a mobile
**Only asked to smartphone owners

THE MEDIA CONSUMPTION HABITS OF AD-BLOCKER USERS

How long are US ad-blockers spending on various types of online media?

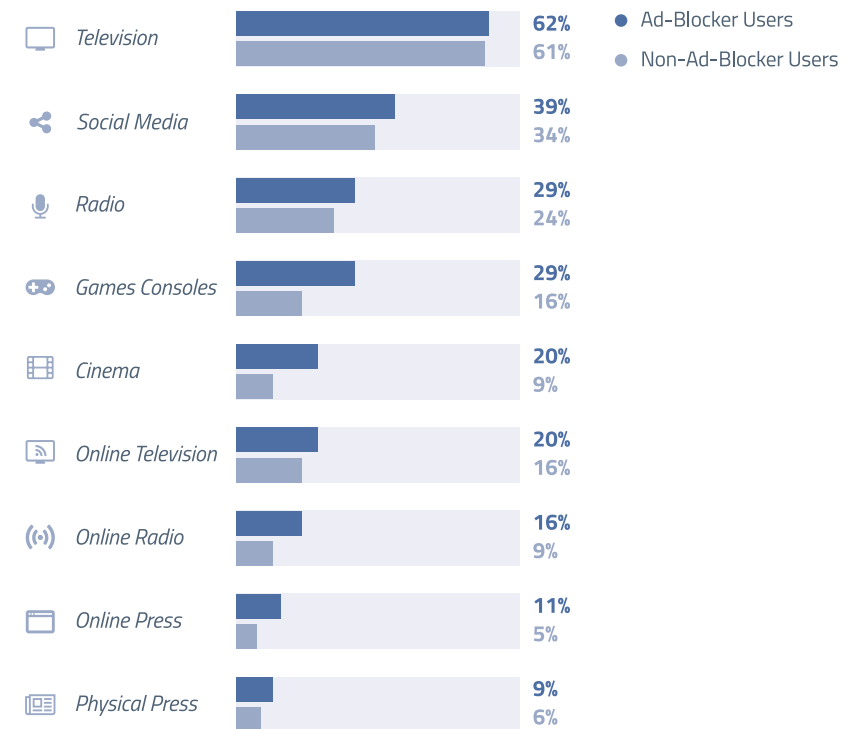## Media Segmentation: Media Consumption Type

When looking at the level of media consumption across Users and Non-Users of ad-blockers on any device, the former group displays a higher level of engagement across all media channels listed. We find that **Ad-blocker Users are more likely to fall under the Heavy or High User segments across all channels than media consumers who are Non-Users** (a definition of High and Heavy Users for each form of media can be found **here**).

The largest differences between Users and Non-Users of ad-blockers are seen for online press, online radio, games consoles and the cinema. We see that Users are nearly twice as likely to use these channels for media consumption than Non-Users.

Overall, those who use ad-blockers are spending more time online, which suggests **users of ad-blockers are more often confronted with disruptive ads and therefore may be more motivated to use ad-blockers than other internet users.**

MEDIA SEGMENTATION: MEDIA CONSUMPTION TYPE

% who are Heavy / High users of the following media channels

- Ad-Blocker Users
- Non-Ad-Blocker Users

Media	Ad-Blocker Users	Non-Ad-Blocker Users
Television	62%	61%
Social Media	39%	34%
Radio	29%	24%
Games Consoles	29%	16%
Cinema	20%	9%
Online Television	20%	16%
Online Radio	16%	9%
Online Press	11%	5%
Physical Press	9%	6%

Question: Roughly how many hours do you spend on the following during a typical day? | **Source:** GlobalWebIndex 21st April-4th May 2017 | **Base:** 1,011 US Internet Users who own a smartphone, laptop, desktop PC or tablet aged 16-64
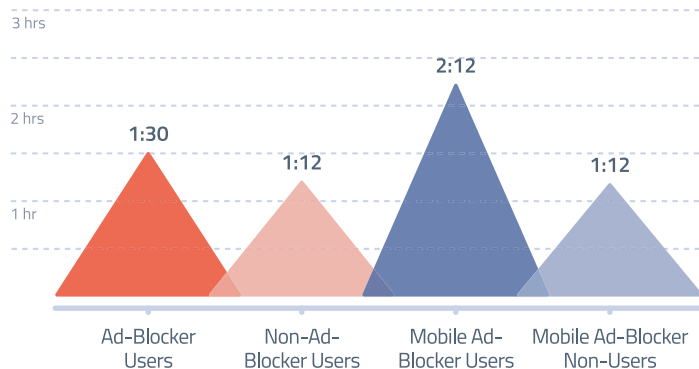
Media Frequency: **Daily Time Spent Online on Mobile**

Media Frequency: **Daily Time Spent Online on a PC, Laptop or Tablet**

During a typical day, users of ad-blockers are spending more time online on their mobiles than Non-Users, with Users spending an average of 1 hour 30 minutes and Non-Users spending 1 hour 12 minutes.

When looking specifically at users of mobile ad-blockers and non-users, the difference between the two groups becomes even more pronounced. Those who block ads on their mobile phones spend an average of 1 more hour per day online than mobile users who do not use ad-blockers. The fact that mobile ad-blocker users are spending over an hour longer on their mobile devices on a daily basis, **highlights how these users are more likely to take action against bothersome ads than those who spend less time connected on their mobiles.**

Similar to media frequency on mobile devices, **Users of ad-blockers are spending more time online via a PC, laptop, and/or tablet than Non-Users.** On average, Users are spending 4 hours 30 minutes online on their PC, laptop, and/or tablet daily. Non-Users spend an average of half an hour less than Users.

Regardless of device used, Users of ad-blockers are spending more time online, suggesting that **those who are consuming more media are likely more motivated to use ad-blockers to make browsing the internet more convenient.**

MEDIA FREQUENCY: DAILY TIME SPENT ONLINE ON MOBILE

Average number of hours spent online on mobile on a daily basis

1:30	1:12	2:12	1:12
Ad-Blocker Users	Non-Ad-Blocker Users	Mobile Ad-Blocker Users	Mobile Ad-Blocker Non-Users

MEDIA FREQUENCY: DAILY TIME SPENT ONLINE ON A PC, LAPTOP OR TABLET

Average number of hours spent online on a PC / laptop / tablet on a daily basis

4:30	4:06
Ad-Blocker Users	Non-Ad-Blocker Users
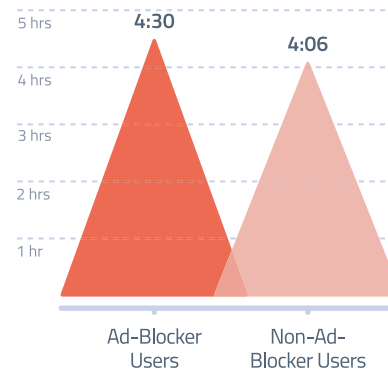
Question: Roughly how many hours do you spend online on a mobile during a typical day? | Roughly how many hours do you spend online on a PC/Tablet/Laptop during a typical day? | **Source:** GlobalWebIndex 21st April-4th May 2017 | **Base:** 1,011 US Internet Users who own a smartphone, laptop, desktop PC or tablet aged 16-64
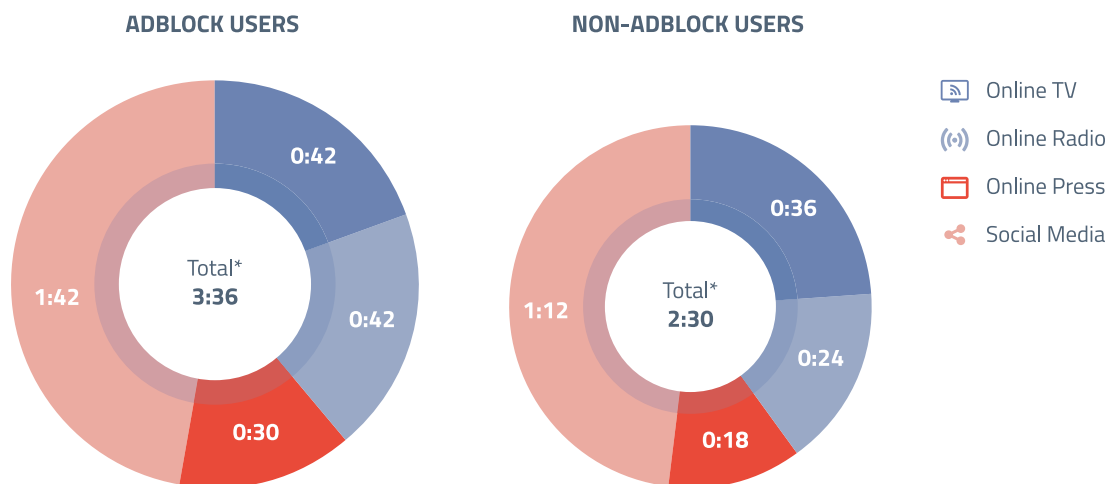
Consumption by Online Media Type

Users of ad-blockers are spending more time than non-users on the following four types of activities: online TV, online radio, online press, social media.

On average, users are spending a total of 3 hours 36 minutes consuming media across online TV, online radio, online press, and social media daily. Non-Users are spending over an hour less across these media types – only 2 hours 30 minutes per day. This discrepancy in media consumption further emphasizes the frustration heavy media consumers may experience when browsing the internet more often, **resulting in the need for a more convenient way to enjoy the internet - by using ad-blockers.**

CONSUMPTION BY ONLINE MEDIA TYPE

Average number of hours spent on the following media types on a daily basis

ADBLOCK USERS

Total*
3:36

0:42
0:42
0:30
1:42

NON-ADBLOCK USERS

Total*
2:30

0:36
0:24
0:18
1:12

📶 Online TV
((·)) Online Radio
🖾 Online Press
🔗 Social Media

*Total number of hours spent consuming online media on a daily basis

Question: Roughly how many hours do you spend engaging with online forms of television / radio / press / social media services during a typical day? | **Source:** GlobalWebIndex 21st April-4th May 2017 | **Base:** 1,011 US Internet Users who own a smartphone, laptop, desktop PC or tablet aged 16-64

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