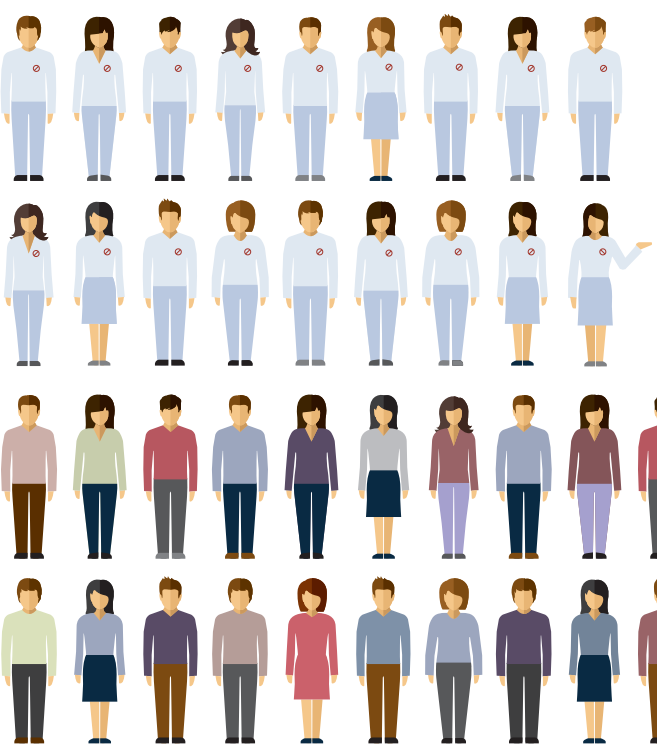


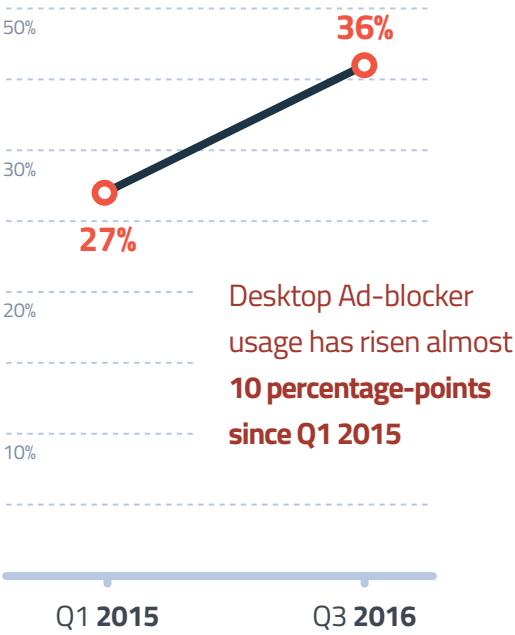
The Rise of Ad-blocking



36%
OF INTERNET USERS
ARE NOW USING
DESKTOP AD-BLOCKERS

Desktop Ad-Blocking Over Time

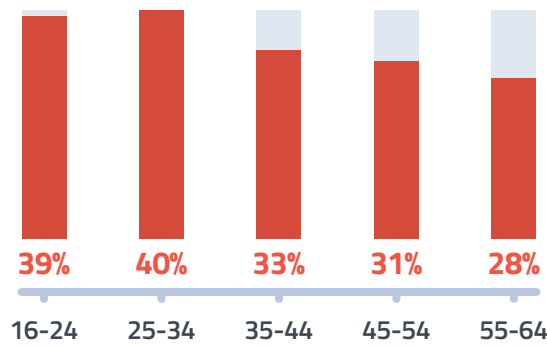
% who are blocking ads on their desktop



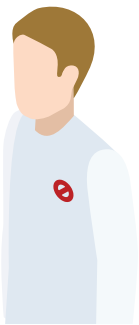
PROFILING AD-BLOCKERS

Ad-Blocking by Demographics

% who are blocking ads on their desktop



Men
39%



Women
32%



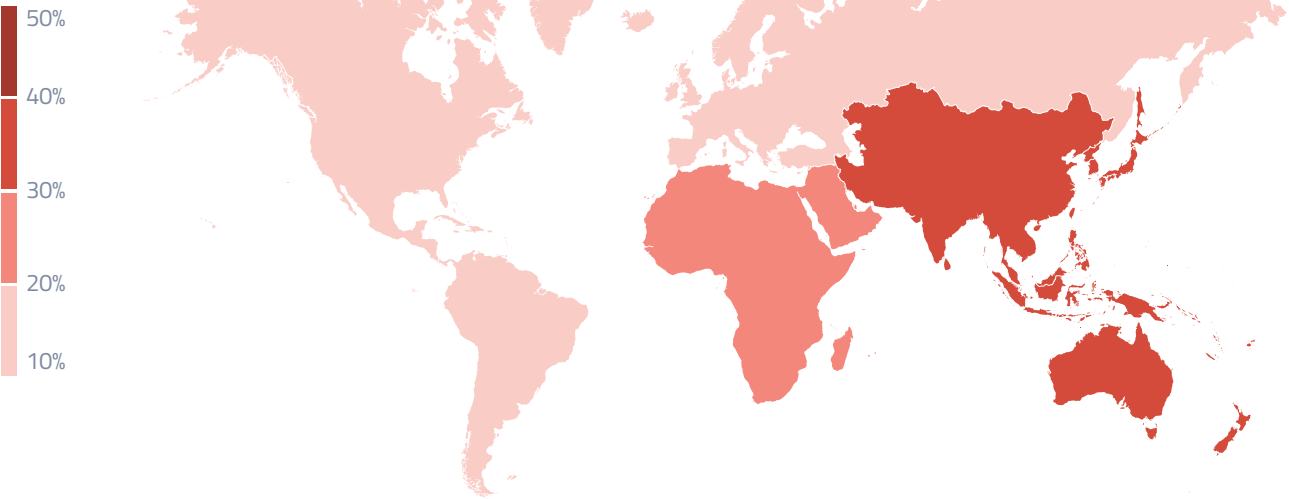
16-34s, men and North Americans are the most likely to be blocking ads on desktop

Personal PC/Laptop Ad-Blocking by Region



North America	40%
Europe	37%
Asia Pacific	35%
Middle East and Africa	33%
Latin America	32%

Mobile Ad-Blocking by Region

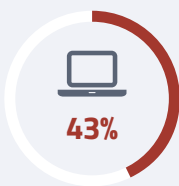


Asia Pacific	36%
Middle East and Africa	23%
Latin America	18%
Europe	17%
North America	15%

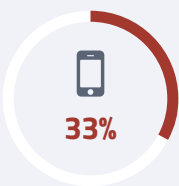
36% of internet users in APAC are blocking ads on mobile but mobile ad-blocking rates remain low in Europe and North America

Device Sharing Among Ad-Blockers

% of ad-blockers who share their device



Almost half of desktop ad-blocker users share their PC/laptop



1 in 3 mobile ad-blocker users share their smartphone

AD-OVERLOAD IS DRIVING AD-BLOCKING

Top Motivations for Ad-Blocking

% of ad-blocker users who say the following are their main reasons for blocking ads

Too many ads are annoying or irrelevant	54%
I think there are too many ads on the internet	48%
Ads take up too much screen space and get in the way	47%
I find online ads intrusive	43%
I want to speed up the time it takes for things to load on my device	33%
I don't like seeing video ads before I'm allowed to watch video content/clips	32%
I try to avoid ads wherever possible, whether on TV or online	31%
I'm concerned about ads compromising my online privacy	28%
I want to stop the battery life on my device from being drained by ads	24%
I don't like ads which are personalized based on my browsing history	22%
I want to stop the data allowance on my phone from being used up by ads*	19%
Other	2%

*mobile ad-blockers only

AD-BLOCKER USAGE DOESN'T MEAN ZERO AD EXPOSURE

Ad-Blockers Top 15 Sources of Brand Discovery

% of ad-blockers who find new brands/products via the following

Search engines	46%
Ad seen on TV	38%
Word-of-mouth recommendation from a friend or family member	36%
Ad seen online	32%
Brand / product websites	32%
TV shows / films	31%
Consumer review sites	28%
Recommendation / comment on a social network	28%
Product comparison websites	25%
In-store product displays or promotions	24%
Ad seen on mobile or tablet app	21%
Ad in a magazine or newspaper	20%
Endorsement by a celebrity or well-known individual	18%
Ad seen at the cinema	18%
Forums / message boards	18%

AD-BLOCKER USERS AREN'T PIRATES

65% ARE BUYING DIGITAL CONTENT

Top 5 Digital Content Purchases

Music download	20%
Movie/TV streaming service	16%
Mobile app	15%
Mobile game	14%
Movie or TV download	14%

Digital content purchases of Ad-Blocker users

% who paid for online content in the last month

