Consumer Attitudes Toward Marketing

Ad blocking, privacy and channel preferences

AD BLOCKING

TRACKING & PRIVACY

USER EXPERIENCE

Q&A

eMarketer Estimates: Ad Blocking Users
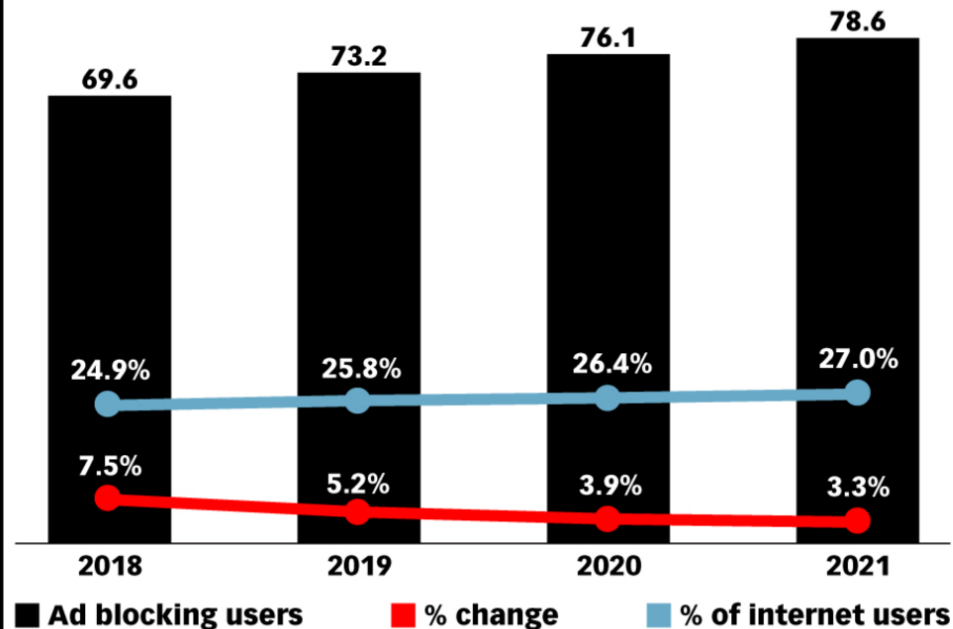
US

WESTERN EUROPE

OTHER HIGHLIGHTS

One in Four Internet Users Blocks Ads

US Ad Blocking Users, 2018-2021
millions, % change and % of internet users

	2018	2019	2020	2021
Ad blocking users	69.6	73.2	76.1	78.6
% of internet users	24.9%	25.8%	26.4%	27.0%
% change	7.5%	5.2%	3.9%	3.3%

■ Ad blocking users   ■ % change   ■ % of internet users

Note: internet users of any age who access the internet at least once per month via any device (including a mobile device) that has an ad blocker enabled
Source: eMarketer, July 2019

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But Some Demos Are Much More Likely to Block Ads

US Ad Blocking User Penetration, by Demographic, 2019 & 2021

% of internet users in each group

	2019	2021
Gender		
Male	26.0%	27.2%
Female	25.6%	27.2%
Age		
0-11	5.1%	5.3%
12-17	34.0%	35.0%
18-24	39.0%	41.0%
25-34	35.0%	36.8%
35-44	28.3%	29.9%
45-54	28.0%	29.8%
55-64	23.2%	24.8%
65+	15.0%	15.6%
Total	**25.8%**	**27.0%**

Note: internet users of any age who access the internet at least once per month via any device (including a mobile device) that has an ad blocker enabled
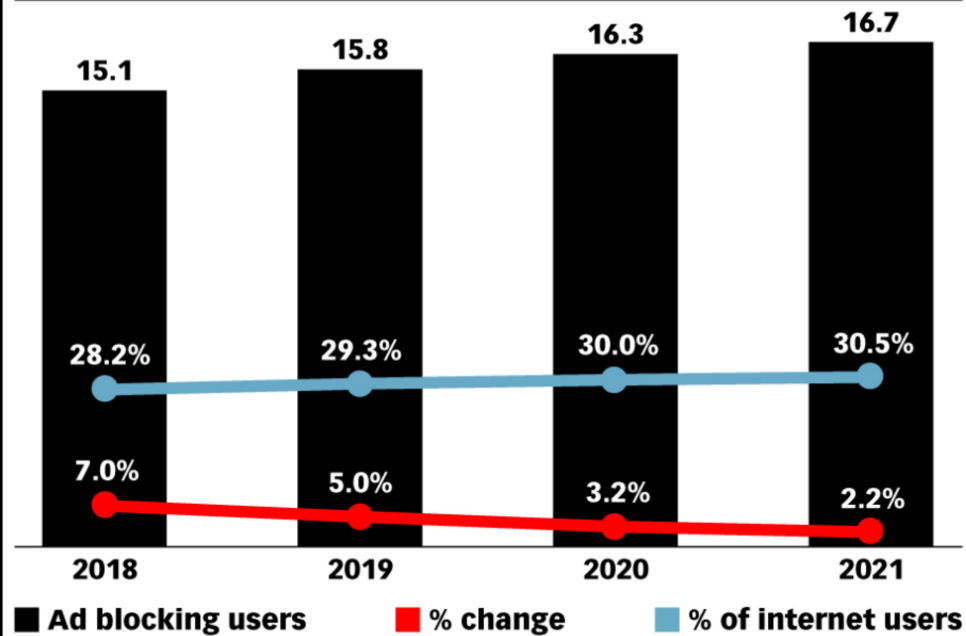*Source: eMarketer, July 2019*

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France

Ad Blocking Users in France, 2018-2021
millions, % change and % of internet users

	2018	2019	2020	2021
Ad blocking users	15.1	15.8	16.3	16.7
% of internet users	28.2%	29.3%	30.0%	30.5%
% change	7.0%	5.0%	3.2%	2.2%

■ Ad blocking users   ■ % change   ■ % of internet users

Note: internet users of any age who access the internet at least once per month via any device (including a mobile device) that has an ad blocker enabled
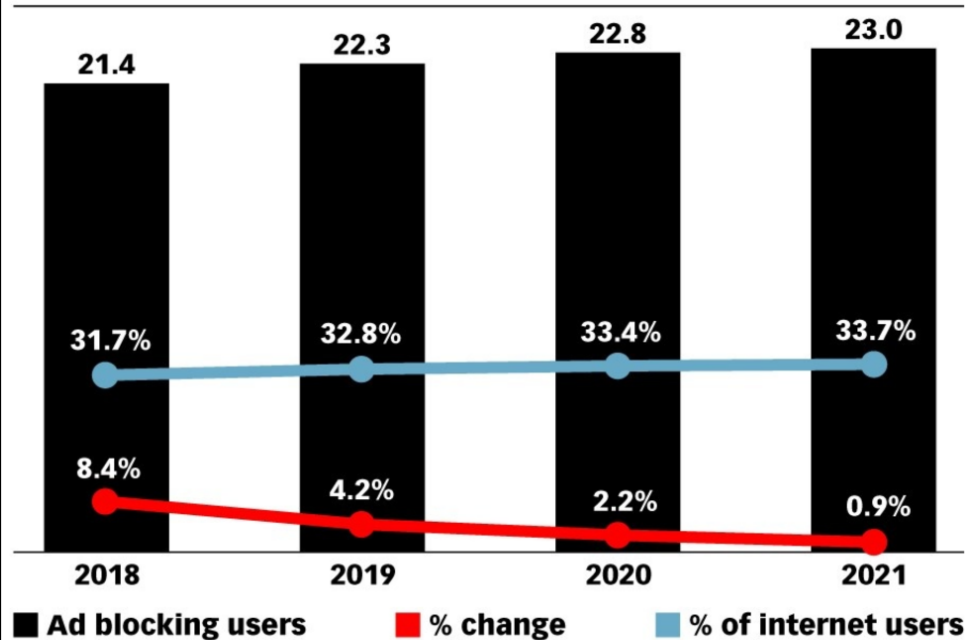*Source: eMarketer, July 2019*

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Germany

Ad Blocking Users in Germany, 2018-2021
millions, % change and % of internet users

	2018	2019	2020	2021
Ad blocking users	21.4	22.3	22.8	23.0
% of internet users	31.7%	32.8%	33.4%	33.7%
% change	8.4%	4.2%	2.2%	0.9%

■ Ad blocking users   ■ % change   ■ % of internet users

Note: internet users of any age who access the internet at least once per month via any device (including a mobile device) that has an ad blocker enabled
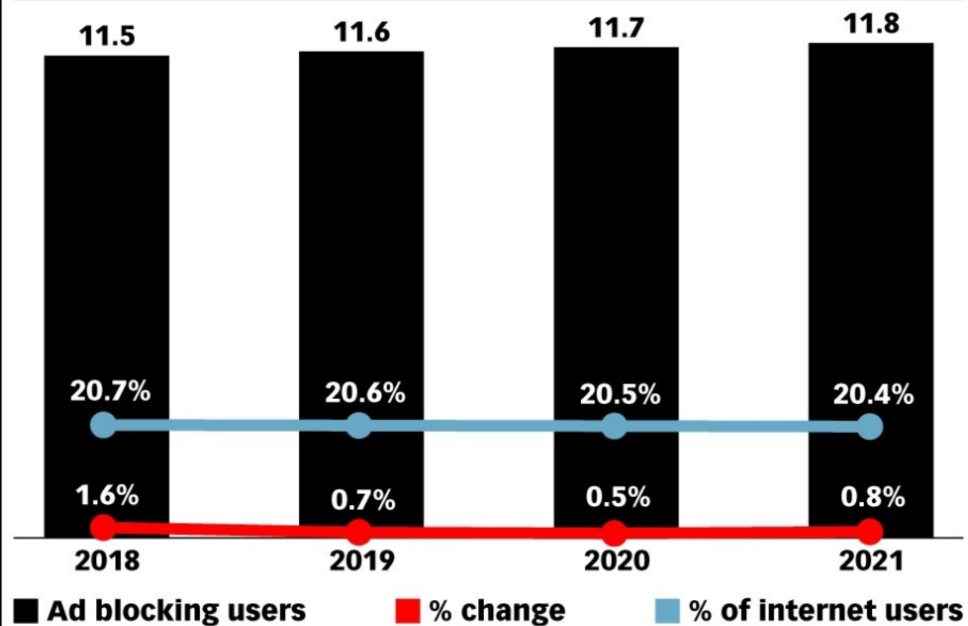*Source: eMarketer, July 2019*

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UK

UK Ad Blocking Users, 2018-2021
millions, % change and % of internet users

2018	2019	2020	2021
11.5	11.6	11.7	11.8
20.7%	20.6%	20.5%	20.4%
1.6%	0.7%	0.5%	0.8%

■ Ad blocking users ■ % change ■ % of internet users

Note: internet users of any age who access the internet at least once per month via any device (including a mobile device) that has an ad blocker enabled
Source: eMarketer, July 2019

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Younger Adults Overindex on Ad Blocking

Ad Blocking Penetration Among Internet Users Ages 18-34 in Select Countries in Western Europe and the US, by Age, 2019

% of internet users

Germany
- 56.0%
- 45.5%

France
- 48.3%
- 42.3%

US
- 39.0%
- 35.0%

UK
- 36.0%
- 26.5%

■ 18-24   ■ 25-34

Note: internet users who access the internet at least once per month via any device (including a mobile device) that has an ad blocker enabled
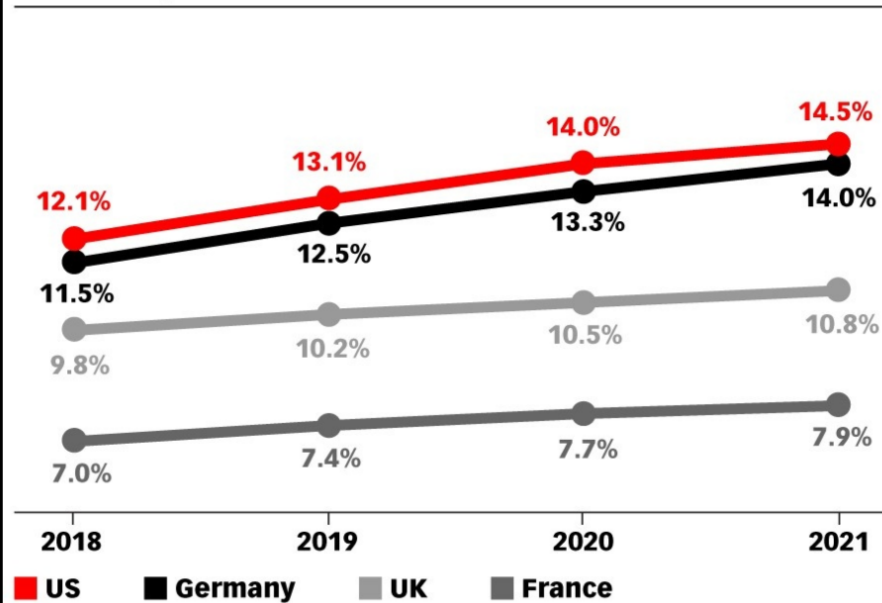*Source: eMarketer, July 2019*

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Smartphones Are Still Relatively Free of Ad Blocking

Smartphone Ad Blocking User Penetration in Select Countries in Western Europe and the US, 2018-2021
% of smartphone users

	2018	2019	2020	2021
US	12.1%	13.1%	14.0%	14.5%
Germany	11.5%	12.5%	13.3%	14.0%
UK	9.8%	10.2%	10.5%	10.8%
France	7.0%	7.4%	7.7%	7.9%

■ US ■ Germany ■ UK ■ France

Note: smartphone users of any age who access the internet at least once per month via a smartphone that has an ad blocker enabled
Source: eMarketer, July 2019

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BETTER AD STANDARDS

OTHER HIGHLIGHTS

Desktop Web Experiences

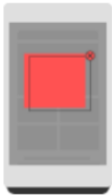| Pop-up Ads	Auto-playing Video Ads with Sound	Prestitial Ads with Countdown	Large Sticky Ads

Mobile Web Experiences

Pop-up Ads

Prestitial Ads

Ad Density Higher Than 30%

Flashing Animated Ads

Auto-playing Video Ads with Sound

Postitial Ads with Countdown

Full-screen Scrollover Ads

Large Sticky Ads

Which Types of Digital Ads Do US Internet Users Consider Annoying?
% of respondents, July 2019

Video ads that play automatically on websites with sound
66.7%

Video ads that play automatically on websites without sound
55.0%

Audio ads (on music streaming services or podcasts)
47.4%

Ads that show up based on my online searches
42.4%

Static images on websites (banner ads) for products I've already purchased
36.7%

Ads on social media feeds targeted to me based on my interests and behaviors
36.3%

Static images on websites (banner ads) for products I've browsed but not purchased
34.2%

I don't consider digital ads annoying
10.0%

Note: n=1,301 who made an online purchase
Source: "The eMarketer Consumer Attitudes on Marketing Flash Survey" conducted in July 2019 by Bizrate Insights, July 8, 2019

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What Do US Internet Users Consider to Be Negative Aspects of Digital Advertising?

% of respondents, Feb 2019

I see too many ads on the webpage
57.0%

Digital ads slow down the web browsing experience
48.7%

Digital ads show me products that I'm not interested in
45.9%

Digital ads prevent the webpage from loading properly
44.4%

Digital ad formats are very intrusive
41.5%

Digital ads show me products I've already purchased
23.5%

Digital ads are too colorful and cheerful for today's world
7.9%

Source: Criteo, "Why We Buy: Consumer Behavior & Loyalty in the Age of Infinite Options," March 13, 2019

245807

www.**eMarketer**.com

Reasons that Ad Blocking Users in France Use an Ad Blocker, by Age, Q1 2019

% of respondents in each group

	16-24	25-34	35-44	45-54	55-64
There are too many ads on the internet	63%	58%	60%	64%	72%
Too many ads are annoying or irrelevant	62%	55%	55%	62%	63%
Ads are too intrusive	51%	44%	51%	52%	64%
Ads take up too much screen space	43%	36%	38%	36%	42%
To avoid having to see video ads before watching clips/shows	40%	32%	25%	29%	33%
Ads sometimes contain viruses or bugs	39%	38%	30%	31%	36%
To speed up page loading times	32%	29%	28%	27%	25%
I try to avoid all ads wherever, whether on TV or online	30%	30%	30%	33%	47%
To stop ads being personalized based on my browsing history	26%	25%	24%	28%	33%
Ads might compromise my online privacy	19%	21%	15%	18%	18%
To stop my device's battery life being drained	17%	19%	16%	10%	10%
I want to stop my data allowance from being used up	9%	15%	9%	7%	4%
Other	1%	4%	3%	2%	1%

Note: n=1,881
Source: GlobalWebIndex, June 25, 2019

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MOST ARE CONCERNED

NOT OK

SENSITIVE CATEGORIES

AD TECH EDUCATION

US Internet Users' Attitudes Toward Personal Data Use, April 2019

% of respondents

Concerned about how tech/social media companies are using my online data and location information for commercial purposes

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
54%	22%	11%	5%	7%

There should be a single national policy addressing consumer data privacy rules in the US

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
48%	24%	20%	4%	4%

OK with online tech/social media companies that collect and use personal data because it makes online searches, advertisements and content more relevant to me

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
3%	8%	13%	19%	56%

■ Strongly agree ■ Neither agree nor disagree ■ Strongly disagree
■ Somewhat agree ■ Somewhat disagree

Note: ages 18+; numbers may not add up to 100% due to rounding
Source: Internet Innovation Alliance (IIA), "Consumer Data Privacy Concerns" conducted by CivicScience, July 30, 2019

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19.

Are US Internet Users Comfortable with Targeted Digital Advertising?

% of respondents, by demographic, April 2019

Age

18-29

| 55% | 45% |

30-44

| 57% | 43% |

45-64

| 64% | 36% |

65+

| 83% | 17% |

Education

High school

| 61% | 39% |

Some college

| 61% | 39% |

College graduate+

| 71% | 29% |

Total

| 62% | 38% |

■ Not OK with targeted ads because I don't like having my online behavior tracked and analyzed

■ OK with targeted ads because it means I see ads and get info about things I'm really interested in
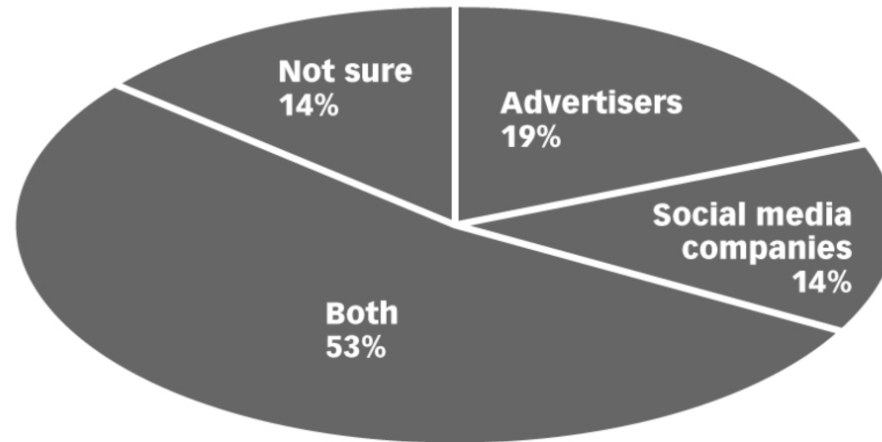
Note: n=1,000
Source: Deseret News survey conducted by YouGov, April 25, 2019

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Who Do US Internet Users Think Are Most to Blame When Advertisers Use Ad Targeting Tools Inappropriately on Social Media?
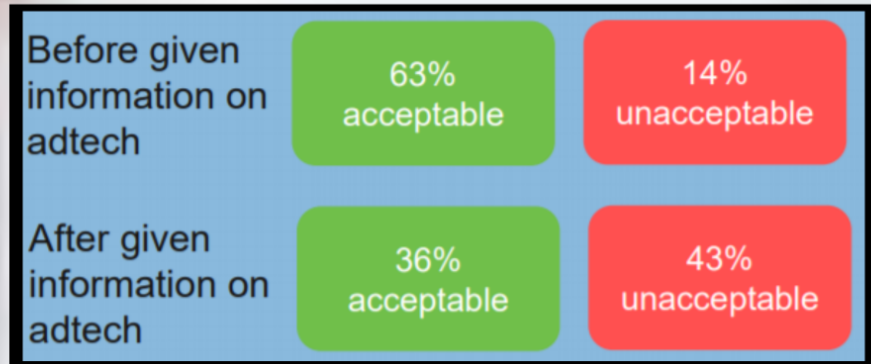*% of respondents, April 2019*

Not sure
14%

Advertisers
19%

Social media companies
14%

Both
53%

Note: n=1,483 ages 18+
Source: The Economist and YouGov as cited in company website, April 9, 2019

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How acceptable or unacceptable is it that some websites display adverts in return for the websites being free to use?

Before given information on adtech	63% acceptable	14% unacceptable
After given information on adtech	36% acceptable	43% unacceptable

The type of information that the website shares with advertisers may include:
• Browsing history
• Device identifiers such as model of phone, operating system and IP address
• Location
• Gender
• Year of birth
• Past purchase history
• Search history

Q&A

PRODUCT RESEARCH

IS DIGITAL ENOUGH?

WILL THEY STOP?

FAIR TRADE

WHAT I DON'T MIND...

What Sources/Channels Do US Digital Device Users Use to Research Products Prior to Purchase vs. Interact with a Brand Post-Purchase?
% of respondents, Dec 2018

Research products prior to purchase

Online review sites	39%
Brand's website	36%
Checking out the product in a store	34%
Online marketplace	33%
Reviews from peers, family, etc.	23%
Social networks	16%
Video channels	14%
Brand's mobile app	10%
Emails from a brand	9%
Online blogs, forums, news	9%
Digital displays in a store	8%
Brand's online chat	5%

Interact with a brand post-purchase

Brand's website	49%
Visit store in-person	30%
Online review sites	22%
Emails from a brand	19%
Social networks	17%
Brand's mobile app	15%
Video channels	12%
Brand's online chat	10%
Online blogs, forums, news	8%

Note: ages 18+ who use digital devices such as desktop/laptop, smartphone or tablet
Source: Adobe, "2019 Adobe Brand Content Survey" in partnership with Advanis, Feb 13, 2019

245453   www.**eMarketer**.com

How Does Seeing a Brand's Message on Multiple Channels Affect How Much Mobile Users Worldwide Trust that Message?

% of respondents, by frequency of exposure, April 2019

No exposure
22% | 13% | 35%

1 channel
34% | 32% | 66%

2 channels
40% | 42% | 82%

3 channels
38% | 52% | 90%

4 channels
25% | 66% | 91%

5 channels
24% | 72% | 96%

6 channels
10% | 87% | 97%

■ **Weak trust in message**   ■ **Strong trust in message**

Note: ages 18+; 9-point scale where strong trust is 8-9 and weak trust is 6-7
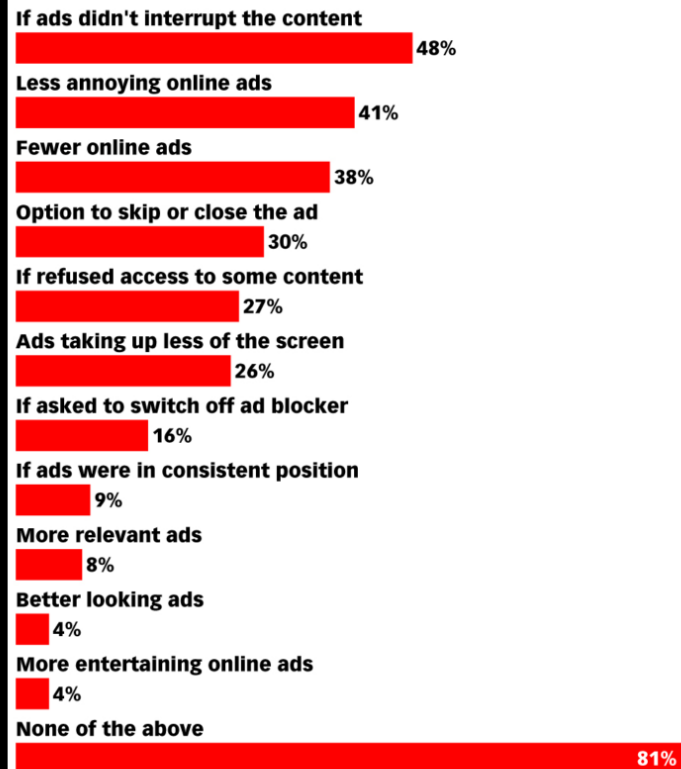*Source: Edelman, "2019 Edelman Trust Barometer Special Report: In Brands We Trust?" June 18, 2019*

248902   www.**eMarketer**.com

Which Situations Would Make Ad Blocking Users in Great Britain Less Likely to Use Ad Blockers?
% of respondents, Feb 2019

If ads didn't interrupt the content
48%

Less annoying online ads
41%

Fewer online ads
38%

Option to skip or close the ad
30%

If refused access to some content
27%

Ads taking up less of the screen
26%

If asked to switch off ad blocker
16%

If ads were in consistent position
9%

More relevant ads
8%

Better looking ads
4%

More entertaining online ads
4%

None of the above
81%

Note: n=460 ages 18+
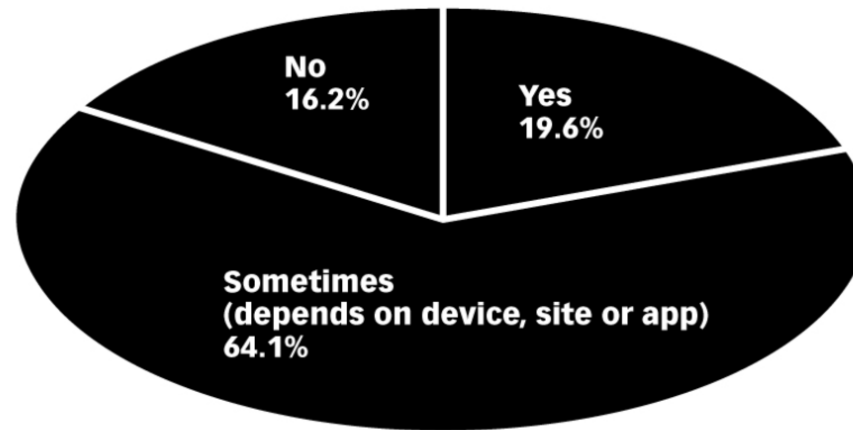*Source: Internet Advertising Bureau UK (IAB UK), "Ad Blocking - Consumer Usage and Attitudes" conducted by YouGov, March 29, 2019*
246413   www.**eMarketer**.com

Do US Internet Users Think Digital Ads Are a Fair Trade for Being Able to View Free Content Online?
% of respondents, July 2019

- No 16.2%
- Yes 19.6%
- Sometimes (depends on device, site or app) 64.1%

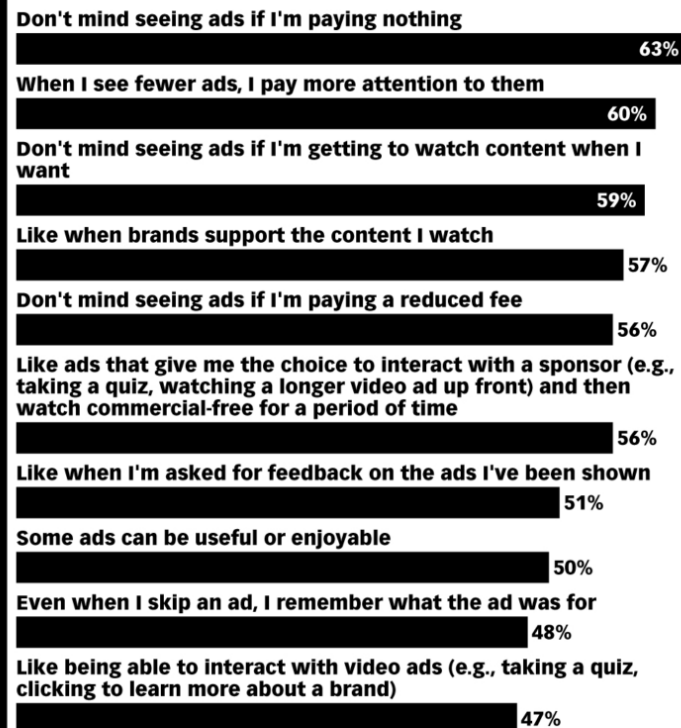*Note: n=1,344 who made an online purchase; numbers may not add up to 100% due to rounding*
Source: "The eMarketer Consumer Attitudes on Marketing Flash Survey" conducted in July 2019 by Bizrate Insights, July 8, 2019

249139
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US Ad-Supported Video Viewers' Attitudes/Behaviors Toward Ads, Sep 2018

% of respondents

Don't mind seeing ads if I'm paying nothing
63%

When I see fewer ads, I pay more attention to them
60%

Don't mind seeing ads if I'm getting to watch content when I want
59%

Like when brands support the content I watch
57%

Don't mind seeing ads if I'm paying a reduced fee
56%

Like ads that give me the choice to interact with a sponsor (e.g., taking a quiz, watching a longer video ad up front) and then watch commercial-free for a period of time
56%

Like when I'm asked for feedback on the ads I've been shown
51%

Some ads can be useful or enjoyable
50%

Even when I skip an ad, I remember what the ad was for
48%

Like being able to interact with video ads (e.g., taking a quiz, clicking to learn more about a brand)
47%

Note: n=589 ages 18+; responses of "agree" and "strongly agree"
Source: Interactive Advertising Bureau (IAB), "Ad Receptivity and the Ad-Supported OTT Video Viewer" conducted by Maru/Matchbox and sponsored by SpotX, Oct 10, 2018

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