

Ad-Blocking, Measured

May 2012



AdBlock.

THE MOST POPULAR EXTENSION
FOR CHROME.

before



How much are publishers losing to ad-blockers?

As today's tracking and analysis systems can't provide an accurate answer, very few publishers know the extent of their losses and tend to underestimate the problem. For the past months, ClarityRay has been conducting a comprehensive and rigorous attempt at measuring the pervasiveness of ad-blocking software, auditing well over 100 million impressions across several top-tier publishers in the US and Europe.

In an effort to overcome the inherent difficulties in measuring ad-blocking - which by itself may distort, or downright halt, any external measure, we have performed live detection (rather than doing so retroactively) directly from within the publisher's site, relying on several unrelated tests. This new method provides for a very high degree of accuracy.

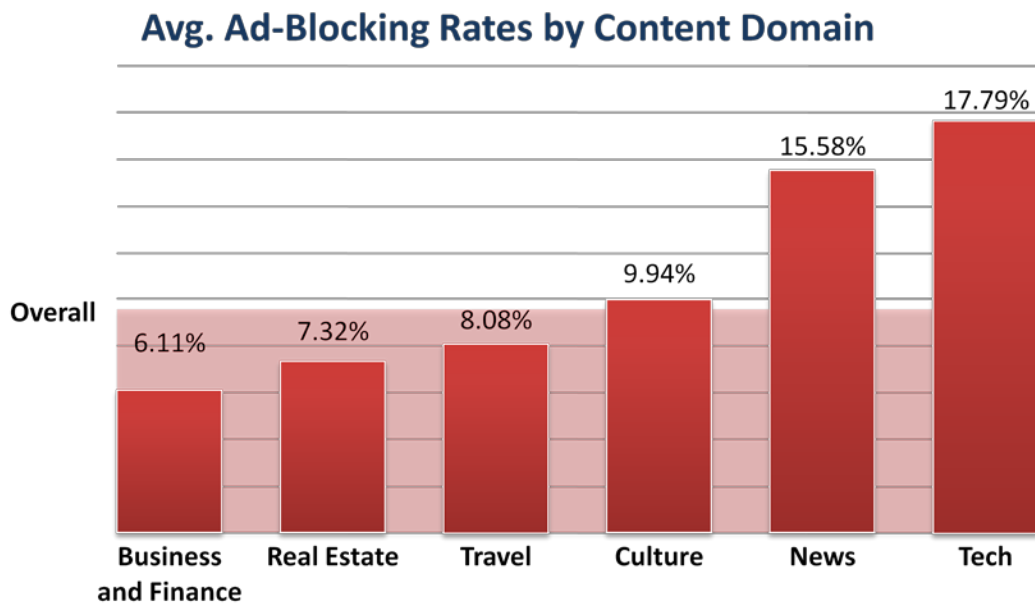
Witnessing the damage incurred by content providers, we would like to share our results with the industry, hoping that precise and reliable benchmarks will help publishers better assess this solvable problem.

Just how big is Ad-Blocking?

- Overall rate of ad-blocked impressions in the US and Europe:

9.26%

- Focusing on specific content domains:



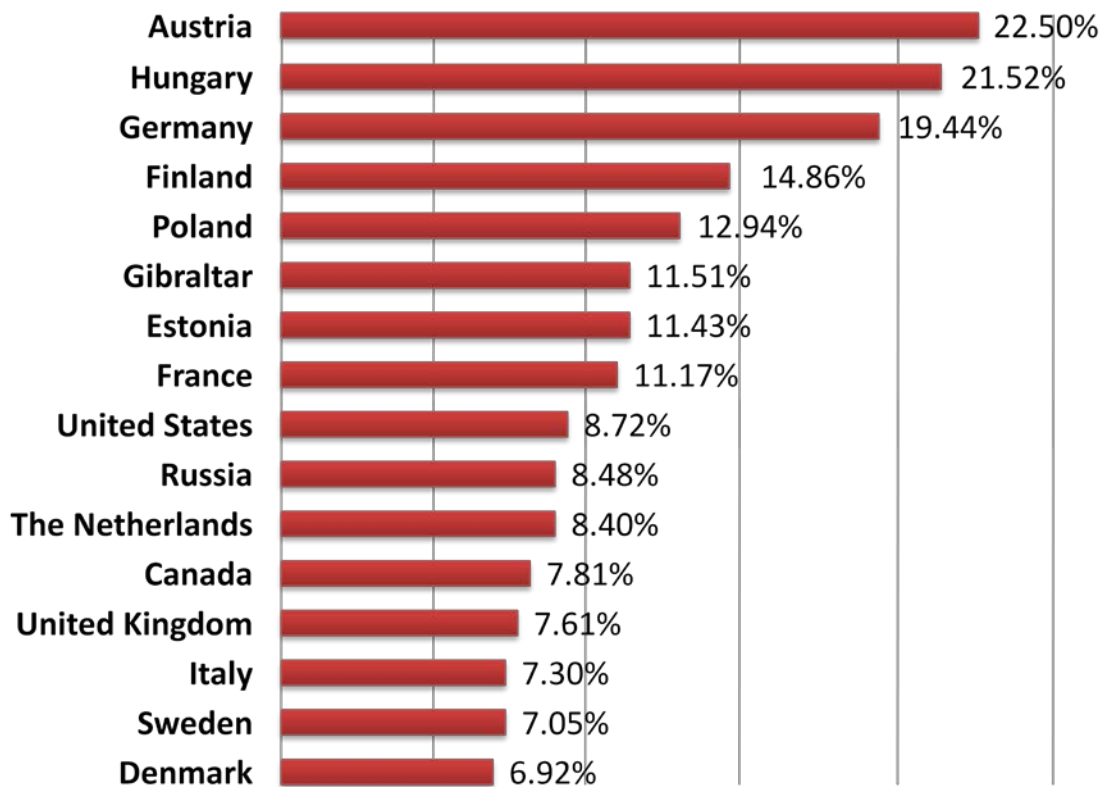
We have seen considerable variance between publishers, with some sites reaching as high as 50% of impressions ad-blocked, depending on browser composition, key demographics and geographical location.

These results are substantially higher than is often assumed. In our experience, publishers tend to dramatically underestimate ad-blocking coverage, and will rarely realize one tenth or one fifth of their revenues are being lost.

Ad-blocking rates highest in US, EU

Ad-blocking rates differ significantly per country. While our research focuses on the US and EU, we've processed results from 129 countries. Compared globally, the US and EU show higher figures: the top 3 countries overall were Austria, Hungary and Germany, each with over 19% ad-blocked impressions, while the top 30 included the United States, France, Russia, the Netherlands and the UK, averaging at an 11% blocking rate; compare that with the bottom 20 which include Iran, Guyana, Kuwait, Myanmar and Qatar, averaging at 1% or less.

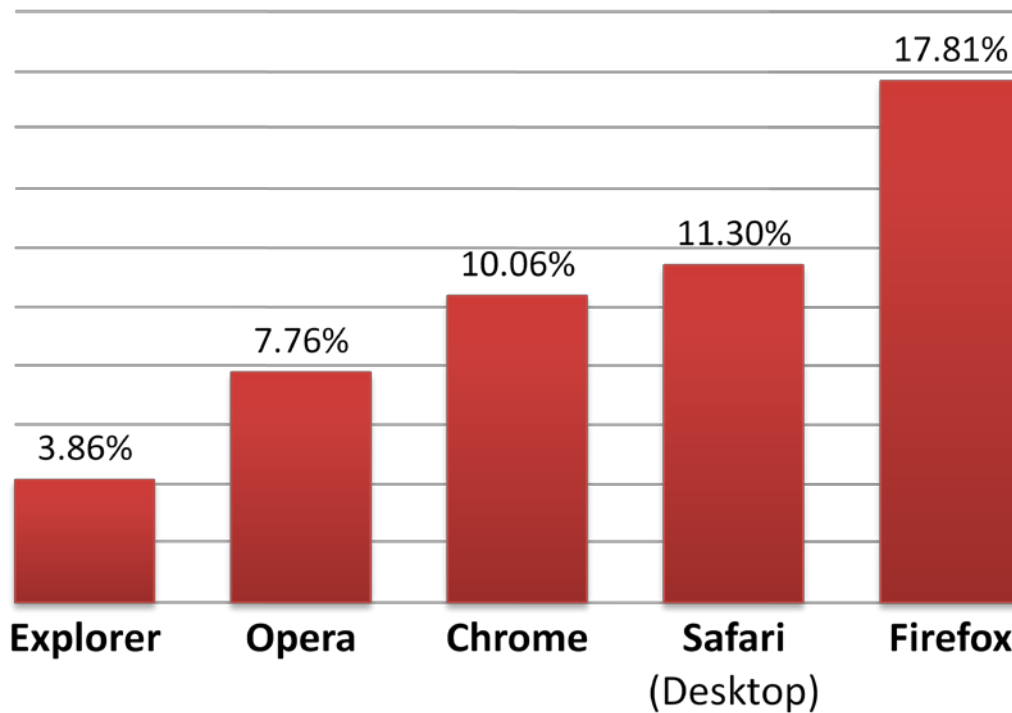
Avg. Ad-Blocking Rates by Country



Firefox, Safari and Chrome show highest blocking rates

Our research reveals that browser composition is an influencing parameter in determining the percent of ad-blocked impressions. Modular browsers with a thriving third-party extension community, as well as an effective and user-friendly distribution pipe are generally much more inclined to be used with ad-blocking software.

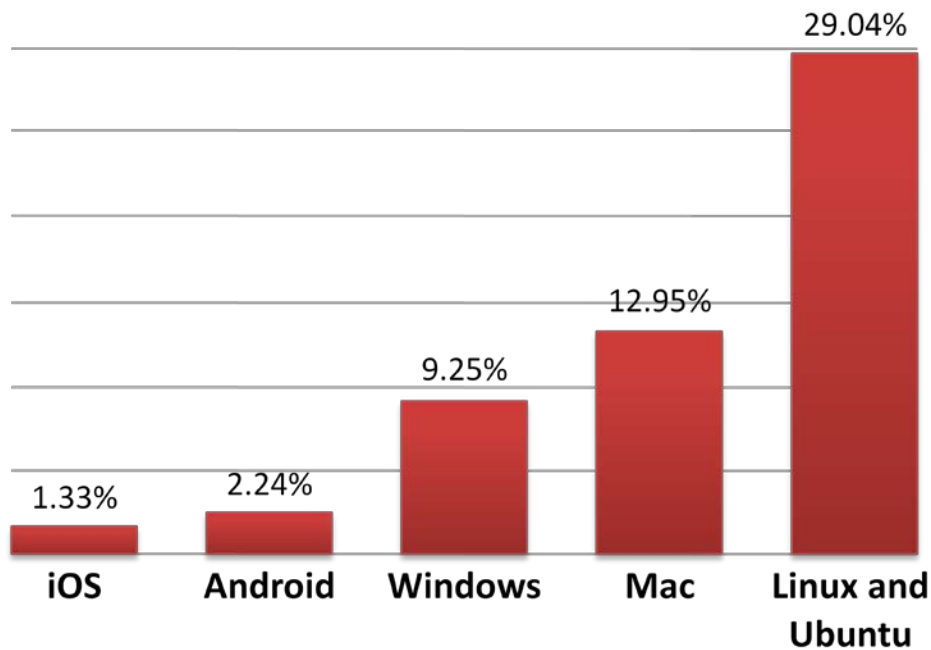
Avg. Ad-Blocking Rates by Browser



Ad-blockers now available on all devices

It is well known that ad-blockers exist for all major browsers. Noteworthy, however, is their astonishing success; ad-blockers are consistently the #1 most popular extensions for both [Chrome](#) and [Firefox](#), and our figures indicate great popularity across other browsers as well. Considering this popularity and the growth of mobile and tablet browsing, it should come as no surprise that ad-blockers are now available and gaining popularity for both [iPhones and iPads](#) [2] [3] and [Android devices](#) [2] [3].

Avg. Ad-Blocking Rates by Operating System

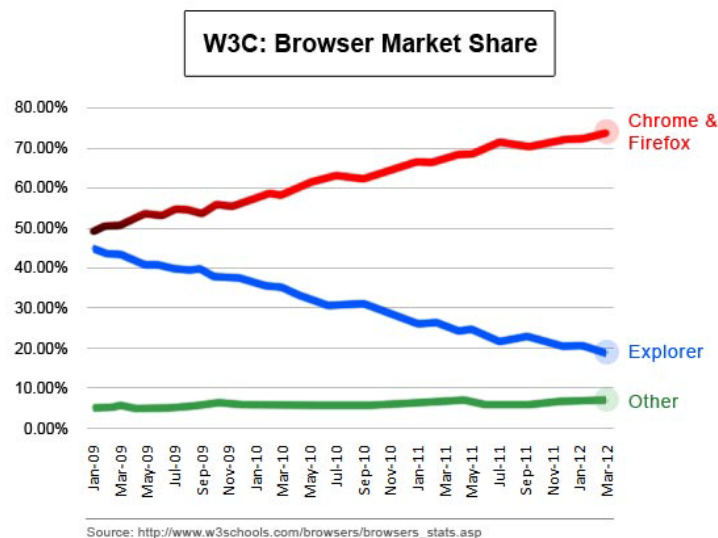


Video ads also blocked

Video ads are not immune to ad-blocking; communication to known ad-servers is disrupted in exactly the same way as regular display or text ads; for example, most popular ad-blockers will block communications to Google's video ad-servers, thus removing video ads from YouTube.

Trend: Ad-Blocking expected to double

As ad-blocking rates are dependent on browser type, the browser composition provides a fairly accurate prediction for ad-blocked losses, with Firefox, Safari and Chrome showing much higher rates than Internet Explorer. We can therefore look at the [browser market \[2\]](#) for an expected trajectory:



The combined market share of Chrome and Firefox is only increasing. Moreover, the great popularity of ad-blockers points to a strong public need; as awareness increases, a free, widely available solution that is one-click away on every platform is bound to increase its consumer adoption. It is, therefore, our estimate that ad-blocking will double within 20 months.

So what can you do?

Let's be honest - ads can sometimes be annoying. A user resorting to using ad-blocking software cannot be blamed - he simply has no other choice. We believe that opting-out of advertising should be an easy, common and legitimate alternative for ad-intolerant users, provided that the content provider can remain as profitable. Unfortunately, that's not the case with pirate ad-blockers, which directly damage revenues, thus hampering with the entire eco-system - including the consumer, as eventually less content will be produced.

Evidently, for everyone's benefit, this is not something publishers must or should reconcile with. By detecting ad-blocking usage live and either offering a paid ad-removal service, or serving alternative ads that are beyond the blocking software's scope, ClarityRay enables publishers to regain their lost inventory.

For more information, and to get your own site accurately measured, please visit our [website](#).