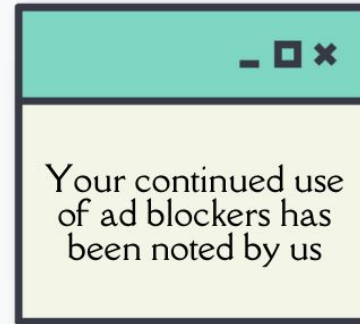
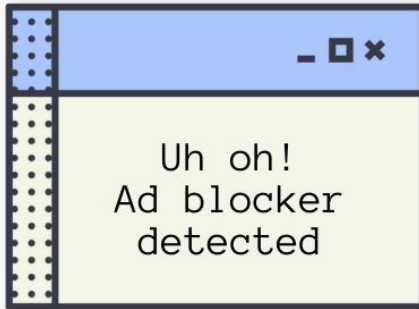


The Decline of Adblock Walls

2022 PageFair Adblock Report



Foreword

We're excited to present the 2022 PageFair Adblock Report, the eighth report in this series.

In this year's report, we learned that desktop adblocking has crept back up to its 2018 high. Since advertising revenue from mobile web is still a *relatively* poor monetization environment for most publishers, this is a trend reversal publishers should monitor closely.

Equally notably, 2021 brought a seismic shift in the landscape of strategies used by top US publishers to mitigate the revenue impact from adblocking, as publisher adoption of adblock walls (or "messaging") as a standalone adblock recovery strategy declined substantially, with only 1 among the top 100 US publishers relying exclusively on it in this year's analysis.

Curious to what precipitated this decline, we focused much of this year's report on adblock walls, including a world-first UX study that tested how users react when they encounter adblock walls in a real-world setting.

The study validated our survey findings from last year, finding that ~80% of adblock users consistently find adblock walls to be an annoyance, and therefore, do not convert.

Finally, by popular demand, we've brought back our adblocking world map, showing adblock rate by country as recorded by our proprietary adblock detection technology and analytics data.

We hope you find this information useful.

Marty Krátký-Katz
Co-founder & CEO, Blockthrough



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Key Insights

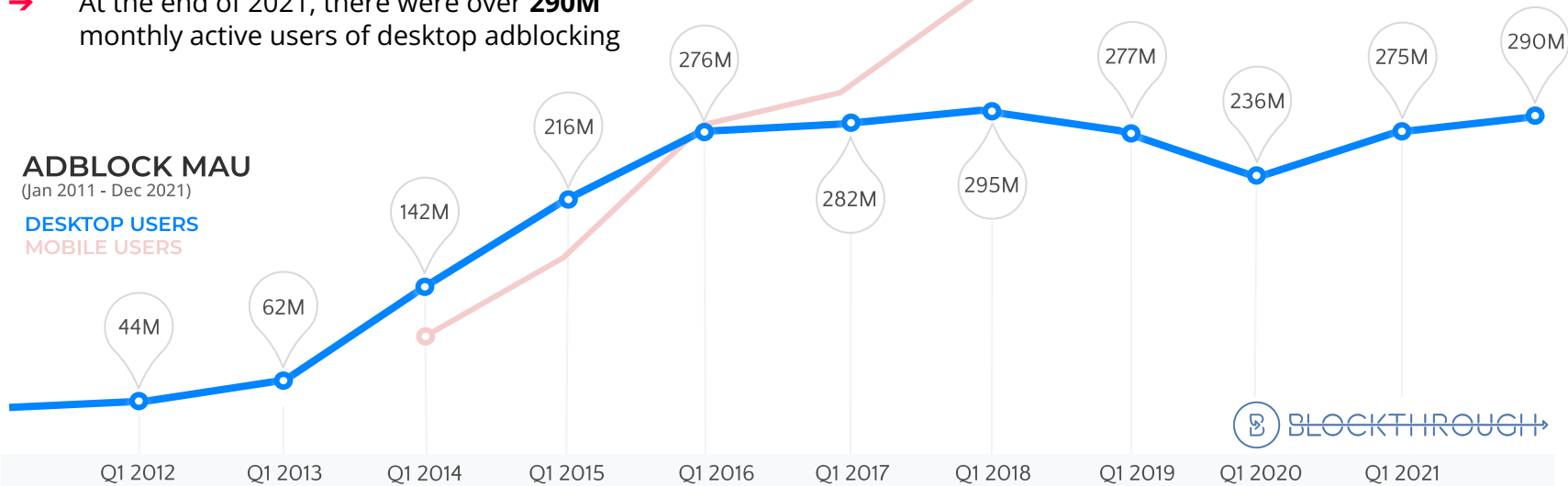
- **With 290M monthly active users globally**, adblocking on desktop has climbed back close to its all-time-high from 2018
- **The average adblock rate across geos and verticals is 21%**, as measured across >10B pageviews on 9,453 websites
- **62% of the top 100 US publishers** were using at least one adblock monetization strategy to reclaim advertising revenue in 2021
- **Use of adblock walls** as a standalone adblock monetization strategy is in decline, with only 1 among the top 100 US publishers relying on it
- **82% of adblock users prefer a lighter ad experience** by default over receiving prompts to disable their adblocker or whitelist a site
- **Opt-in rate for Acceptable Ads has crossed 95%** for the first time since we started analysing and reporting on its userbase
- **94% of global publishers surveyed** say they cannot precisely quantify the revenue loss incurred due to adblocking



Desktop Adblock Users

Desktop adblocking resumes growth for second consecutive year

- These are conservative estimates that *do not* take into account wide-spectrum content blockers, VPN/DNS-based adblockers, and network-level adblockers
- Desktop adblocking growth initially slowed in 2016-2018, then declined in 2018-2020; however, the last two years show a reversal of that trend
- At the end of 2021, there were over **290M** monthly active users of desktop adblocking



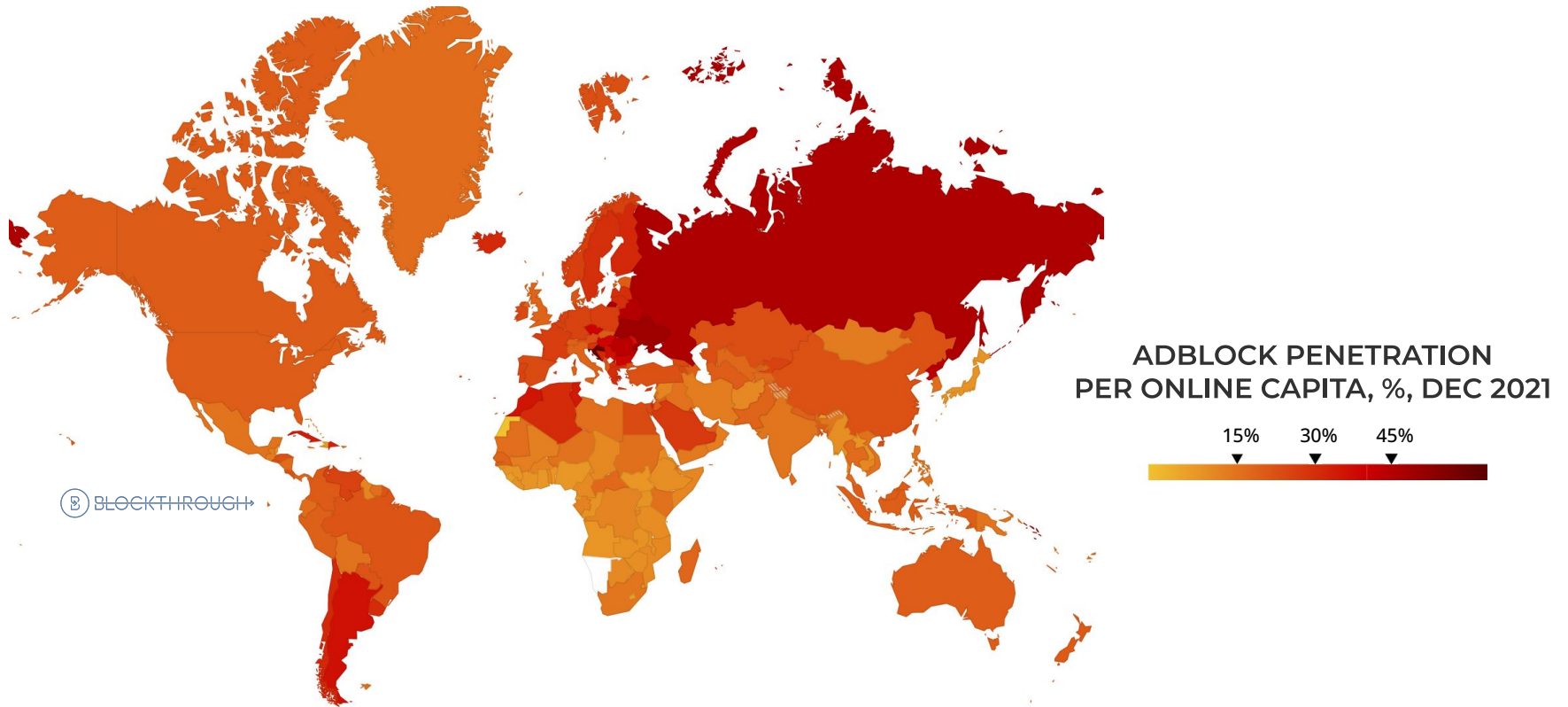
Mobile Adblock Users

Mobile adblocking declines slightly after multi-year growth

- This YoY decline is almost entirely attributable to **India's ban of UC Browser**, which decreased its user count by ~106M users
- With **262M users**, *Opera* has surpassed *UC Browser* as the most popular mobile browser that blocks ads by default
- The *Brave* adblock browser grew 100% YoY to reach **29M users** by Dec 2021



Adblock Penetration by Country



Adblock rates by Country and Category

Based on an analysis of >10B pageviews across 9,453 sites

Albania	20%	Egypt	23%	Lebanon	14%	Romania	40%
Algeria	29%	El Salvador	21%	Lithuania	28%	Russia	42%
Argentina	34%	Estonia	19%	Luxembourg	21%	Saudi Arabia	26%
Armenia	23%	Finland	30%	Malaysia	19%	Serbia	34%
Australia	19%	France	25%	Malta	21%	Singapore	23%
Austria	22%	Georgia	23%	Mexico	15%	Slovakia	19%
Azerbaijan	19%	Germany	24%	Moldova	34%	Slovenia	27%
Bahrain	19%	Ghana	8%	Morocco	31%	South Africa	15%
Bangladesh	20%	Greece	28%	Myanmar	10%	South Korea	16%
Barbados	11%	Guatemala	28%	Nepal	18%	Spain	23%
Belarus	41%	Honduras	21%	Netherlands	24%	Sri Lanka	17%
Belgium	25%	Hong Kong	23%	New Zealand	20%	Sweden	28%
Bolivia	15%	Hungary	36%	Nicaragua	16%	Switzerland	18%
Bosnia	30%	Iceland	29%	Nigeria	8%	Taiwan	19%
Brazil	21%	India	15%	Norway	25%	Thailand	17%
Bulgaria	36%	Indonesia	19%	Oman	13%	The Bahamas	10%
Cambodia	11%	Iraq	15%	Pakistan	18%	Trinidad & Tobago	14%
Canada	20%	Ireland	23%	Palestine	14%	Tunisia	32%
Chile	23%	Israel	28%	Panama	18%	Turkey	21%
China	21%	Italy	18%	Paraguay	21%	UAE	19%
Colombia	20%	Jamaica	11%	Peru	19%	UK	18%
Costa Rica	21%	Japan	9%	Philippines	15%	Ukraine	45%
Croatia	55%	Jordan	20%	Poland	25%	Uruguay	29%
Czech Republic	36%	Kazakhstan	22%	Portugal	24%	USA	19%
Denmark	20%	Kenya	15%	Puerto Rico	13%	Uzbekistan	17%
Dominican	31%	Kuwait	22%	Qatar	15%	Venezuela	25%
Ecuador	16%	Latvia	28%	Réunion	28%	Vietnam	15%

IAB Categories

IAB1 (Arts & Entertainment)	27%
IAB2 (Automotive)	21%
IAB3 (Business)	18%
IAB4 (Careers)	21%
IAB5 (Education)	18%
IAB7 (Health & Fitness)	20%
IAB8 (Food & Drink)	20%
IAB9 (Hobbies & Interests)	21%
IAB10 (Home & Garden)	16%
IAB11 (Law, Gov't, and Politics)	15%
IAB12 (News)	16%
IAB13 (Personal Finance)	21%
IAB14 (Society)	18%
IAB17 (Sports)	25%
IAB18 (Style and Fashion)	20%
IAB19 (Technology and Computing)	26%
IAB20 (Travel)	22%
IAB22 (Shopping and E-commerce)	25%
IAB24 (Uncategorized)	12%

Non-IAB categories

Games	31%
Reference materials	23%
Gambling	31%
Engineering	51%
Adult	33%



Acceptable Ads User Attributes

Users who filter ads less likely to experience banner blindness, more 'ad aware'

What is ad filtering?

A few years ago, adblocking was an all-or-nothing proposition for users and publishers. Today, the most popular adblockers allow non-invasive ads that comply with the [Acceptable Ads](#) to be served to opted-in users.

Acceptable Ads

Governed by the independent Acceptable Ads Committee, Acceptable Ads define a lighter ad experience that is considered "acceptable" by at least 65% of surveyed adblock users. Since Acceptable Ads excludes ad formats that users deem overly intrusive or interruptive, adblock users have little reason to opt out of the experience, which is validated by its high opt-in and low opt-out rates (see next page).

Better value exchange

By giving Web users complete control over their online advertising experience, ad-filtering tools allows a sustainable and fair value exchange to be restored between users and publishers.

Acceptable Ads Users are:

50% more likely to post comments in forums
76% more likely to post a product/service review
26% more likely to engage with brands
42.5% more likely to visit coupon/deal sites



More ad aware

Ad-filtering users are not constantly bombarded with ads as they browse the Web, which makes them more likely to pay attention when they are served light, non-invasive advertising formats.



Consent-ready

The consent mechanism for Acceptable Ads is at the browser/extension level, eliminating the need for site-level opt-in. All ads served must comply with privacy regulations like GDPR, CCPA and others



Unique cohort

Ad-filtering users are hard to reach for advertisers, making them more valuable. Publishers need to educate themselves on how these users think and the type of web experiences they prefer.

Acceptable Ads Opt-in Rate Crosses 95%

Total user opt-ins for Acceptable Ads grow slightly on desktop, remain stable on mobile

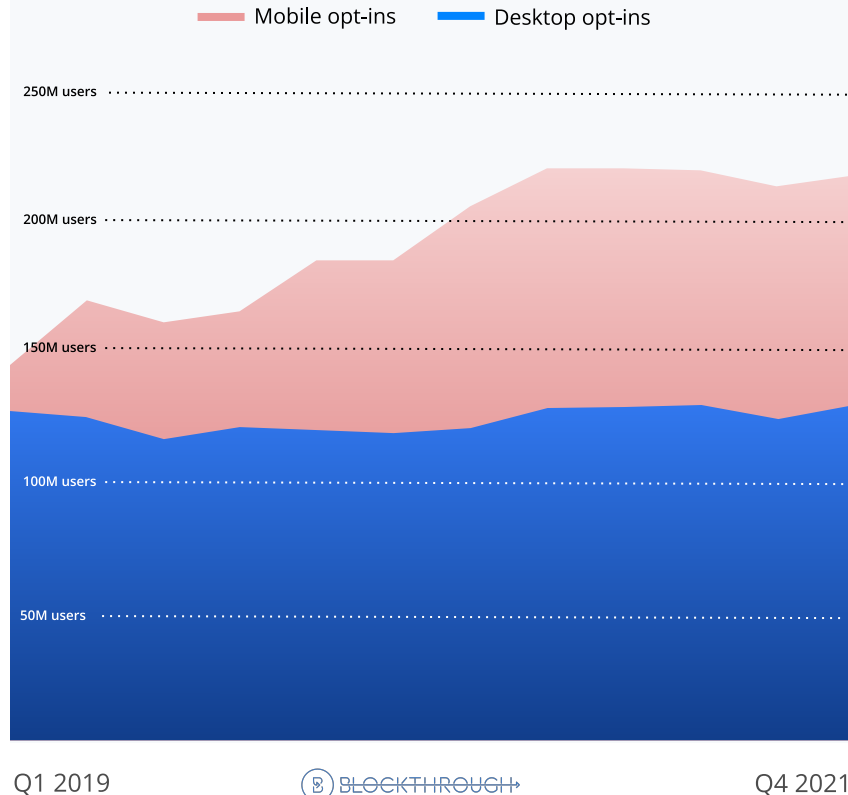
Key Findings

- Acceptable Ads now have a **>95% average opt-in** rate from users of browsers and extensions that support it, up 2% from last report
- By the end of 2021, **a total of 216M adblock users were opted in to Acceptable Ads**, up 50% from the beginning of 2019
- **Desktop opt-ins for Acceptable Ads have grown 10%** since their lowest point in 2019, going from 115M users to 128M users
- Earlier this year, the Acceptable Ads Committee updated the criteria within Acceptable Ads to **include in-content ads**—opening up new revenue opportunities for publishers

Analysis

The growing opt-in rate of Acceptable Ads highlights its effectiveness as an industry standard for adblock monetization. Acceptable Ads users are the largest cohort of ad-filtering users on the Web — by remaining opted in, they automatically support their favorite publishers financially by allowing a lighter advertising experience.

Global opt-ins for Acceptable Ads



Recovery Strategies of Top US Publishers

For a third year, we reviewed the adblock monetization strategies employed by the Comscore Top 100 US publishers impacted by adblocking. Based on our analysis, 62% of publishers impacted by adblocking were using at least one adblock monetization strategy.

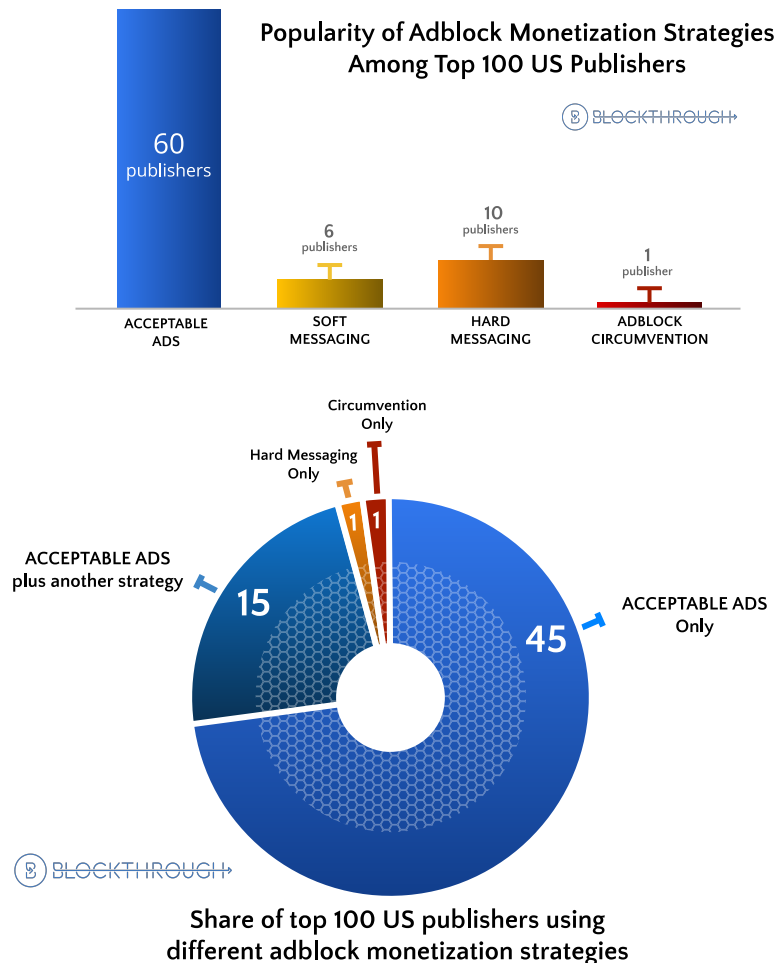
Key findings

Of the 62 publishers that take measures to monetize adblock users:

- **60 use ad recovery via Acceptable Ads**, up from 52 the previous year. Only 9 of these work directly with participating adblockers; the remainder work with an ad tech vendor that supports Acceptable Ads.
- **8 of the top 10 US publishers** using display ads (including Google, Verizon, and Amazon) monetize with Acceptable Ads.
- **Blockthrough was the most popular dedicated vendor**, with >50% market share among top publishers using Acceptable Ads.
- Only 1 major US publisher (**Facebook**) still uses adblock circumvention.

Analysis

Over the last 2 years, we reported that the top ad-funded US publishers had embraced the Acceptable Ads ecosystem as the most reliable and sustainable means to monetize their ad-blocking and ad-filtering audience. That trend continued through the end of 2021, with a growing majority of US publishers leveraging Acceptable Ads.



UX study on adblock walls

Results on how users interact with adblock walls in a real-world setting

What are adblock walls?

Adblock walls work by detecting the presence of an adblocker in a user session and then restricting access to content unless the user disables their adblocker or whitelists the website.

Generally, adblock walls can be **soft** (dismissible) or **hard** (non-dismissible).

About the study

Users were asked to browse sites that have a live adblock wall and then provide feedback on their experience.

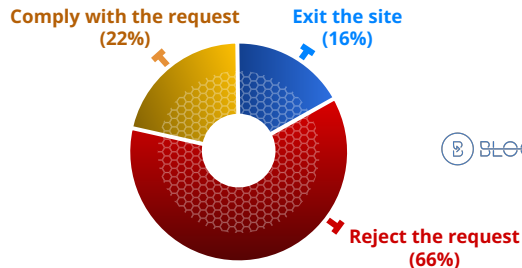
Study Demographics

Gender: Male or Female
Age: 18-40
Country of residence: US

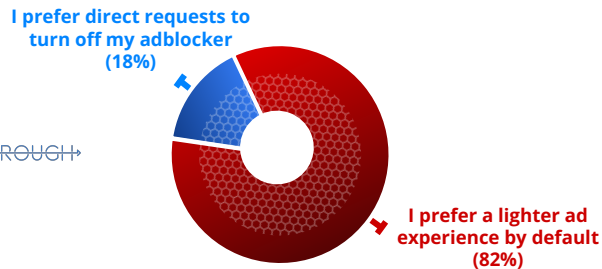
Result

This UX study further validates last year's survey of 5,000 US internet users, showing that **~80% of adblock users** consistently find adblock walls to be an anti-user tactic and, consequently, don't convert when presented with one.

How do you usually react to adblock walls when browsing?



As an adblock user, which of these two experiences would you prefer?



User reactions

“ I hate these things! I use a lot of different ad blockers and it's a pain to deal with these notices. I always block the overlay.

“ I hate ads that autoplay, ads that are animated... and it's infuriating to get requests to turn off my ad blocker.

“ I get really annoyed when I'm asked to turn off my ad blocker and usually find another site that gives me the same info.

“ I don't want to support an annoying website. They can't get me to comply, so won't give them my viewership.

Decline in the adoption of adblock walls

Only 1 among the top 100 US publisher now relies exclusively on messaging

What the trend shows

The adoption of Acceptable Ads has been dominant and steadily growing over the last 3 years among top US publishers. While many publishers have experimented with an adblock wall, its use as a standalone strategy has declined rapidly. A few reasons why:

1. Messaging fatigue

Adblock walls compete with other pop-ups (e.g. consent, newsletter sign-ups, subscription) for user attention, leading to annoyed users, low conversion rates, and high bounce rates.

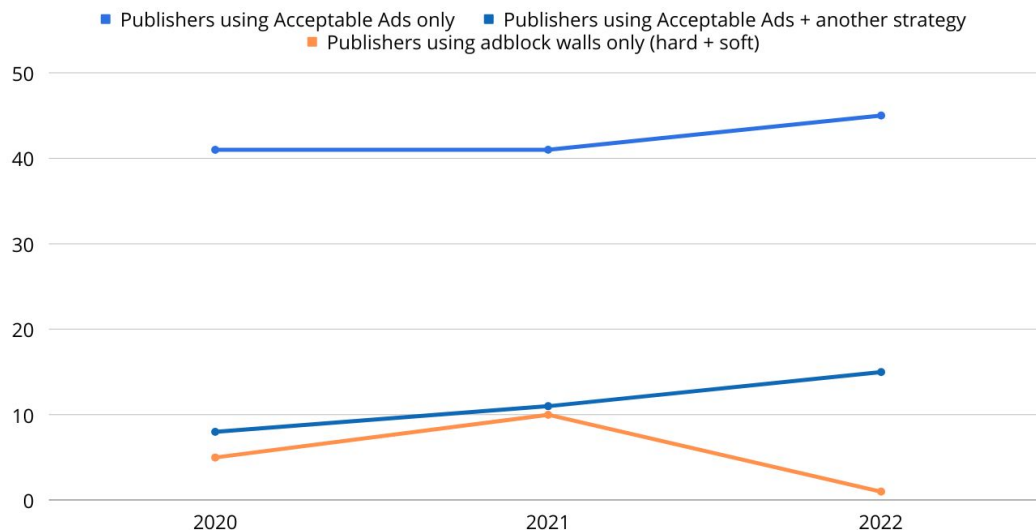
2. Anti-user approach

Adblock walls perpetuate the same fundamental problem that drives users to install adblocking extensions — they interrupt the browsing experience often.

3. Dark UX patterns

In our study, most users were not able to spot the ('x') button for dismissing the wall, some vendors deliberately present these in small fonts sizes or colour combinations that hinder readability.

3-year Adoption of Adblock Monetization Strategies by Top-100 US Publishers



Rev Ops Barometer Report

New survey reveals the state of adblock readiness globally

Key Findings

- **32% of the publishers surveyed** are not doing anything about adblocking
- **94%** are **not able to precisely quantify the revenue loss**
- **57%** are **not confident they can quantify it at all**

Analysis

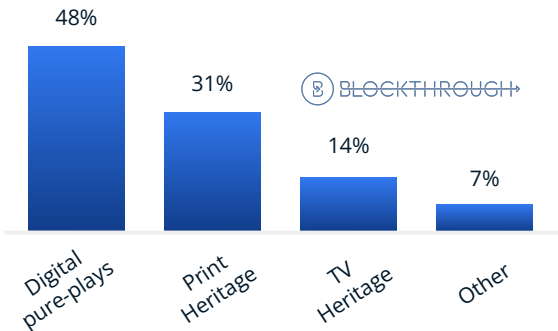
Despite the availability of multiple solutions that can help measure adblock rates and mitigate adblock-related revenue loss, a significant number of publishers still don't have a strategy in place to start recovering that lost revenue. The current approach to adblocking and willingness to test new solutions also varies by region, category, and the organization's "Rev Ops maturity index". Finally, many publishers falsely assume that *all* adblock users have the same motivations, preferences, and beliefs.

Survey demographics

176
Global RevOps and
AdOps Professionals



75% Americas
25% EMEA + RoW



In late 2021, Blockthrough commissioned a publisher survey about adblock readiness in the Rev Ops Report (H2, 2021) produced by *Colab Consulting* and *Beeler.Tech*, which yielded responses from 176 Rev Ops and Ad Ops professionals.

The following pages present findings from that survey.

Adblock Readiness

Lack of confident measurement makes it harder to quantify the revenue threat from adblocking

Key Findings

- **43% of publishers** are confident they know the approximate level of adblocking on their sites, **while 21% have never tried to measure it**
- **94% of publishers felt they cannot precisely quantify the revenue loss** they are incurring due to adblocking
- **Publishers in the Americas** are more confident they know how much adblocking taking place across their sites, **and also twice as likely as EMEA/RoW publishers** to be open to testing a solution
- **Pure-play digital publishers** are slightly more likely than heritage media to be open to testing new adblock mitigation strategies

Analysis

Only 29% of the publishers in the Rev Ops Barometer survey have an adblock recovery strategy in place, in sharp contrast to the top 100 US publishers—who have a 62% adoption rate. Additionally, publishers' openness to evaluating recovery strategies grows in proportion to their confidence level in adblock rate measurement. In other words, it's difficult for publishers to prioritize the problem until they are aware of its full scale across their sites.

What is your level of preparedness against adblock-related revenue loss?

(Respondents could select multiple options)



About Blockthrough

Founded in 2015, Blockthrough is the market leader in adblock monetization. Publishers use our best-in-class technology to serve Acceptable Ads to consenting adblock users, with the option of using their existing programmatic demand partnerships or plugging in Blockthrough's demand.

Blockthrough acquired PageFair in late 2018, and this report is a continuation of the annual PageFair Adblock Report, which was instrumental in driving industry dialogue about and publisher awareness of the state of global adblocking since the launch of the first edition in 2013.

We're passionate believers in the free Internet and, at the same time, are adblock users ourselves. We believe that publishers have the right to monetize their content, and their users deserve an outstanding experience.

We're also incredibly proud of [our talented and hard-working team](#).



2021
REPORT ON BUSINESS
CANADA'S TOP GROWING
COMPANIES

50

Technology **Fast 50**
2021 CANADA
COMPANIES-TO-WATCH WINNER
Deloitte.



The Drum Awards
Digital Advertising
Finalist 2022



Next Steps

Publishers

- Check [our revenue recovery calculator](#) to get an estimate of how much adblock revenue you can recover, or email us at sales@blockthrough.com
- [Get in touch](#) to learn more about Blockthrough's market-leading adblock monetization platform, to measure your adblock rate or to find out more
- Sign up to [our newsletter](#) and follow us on [Twitter](#) or [LinkedIn](#) to keep abreast of the latest developments in the adblock-mitigation world

Advertisers

- To learn how you can advertise to hard-to-reach, consenting adblock users via Acceptable Ads, email us at contact@blockthrough.com

Journalists

- Feel free to reproduce any part of this report, attributed to Blockthrough
- Email vj@blockthrough.com for media inquiries



EASY TO IMPLEMENT

Most publishers can get live within a sprint cycle.



ALL BROWSERS AND PLATFORMS

Compatible with every mainstream browser (desktop & mobile).



WORKS WITH YOUR EXISTING PARTNERS

Bidthrough uses your existing programmatic setup.



RICH ANALYTICS

Keep track of your audience's adblock adoption, and how much new revenue you're earning.

Methodology

Calculation of Desktop Adblock Users

Up until the 2020 PageFair Adblock Report, the number of devices using adblock software on desktop/laptop computers was calculated by estimating the number of monthly active adblock users that are required to generate the number of downloads that were recorded for blocklists in each historical month.

A blocklist is a frequently-updated structured text file that contains rules about how to block ads on websites. All major desktop adblock software works by downloading one or more community-maintained blocklists to drive their behavior. Normally they download the “*Easylist*” blocklist, or download a *combolist*, which combines both Easylist and a language-specific blocklist. For example, “*Liste_FR+Easylist*” provides additional rules to block ads on the French web. Each blocklist includes an expiry header, which tells the client software how many days to wait before downloading a newer version. For example, given a web browser configured with an adblock extension which is subscribed to a blocklist with an expiry of 4 days, that computer will download that blocklist once every 4 days so long as the browser remains open. If the web browser is shut down, it will re-download the blocklist at its next available opportunity. Most of the major community blocklists are hosted by Eyeo GmbH (“*Eyeo*”), the company that operates *Adblock Plus* (the most popular desktop adblock software). Eyeo therefore has 1st-party access to basic web statistics about the traffic received by each blocklist.

This year, due to the increasing complexity involved in aggregating raw data (filterlist downloads) from multiple sources, Eyeo instead shared their own internal estimations for the number of active users for the years 2019, 2020, and 2021. We made over-the-top calculations for the number of desktop users on Opera, Brave, and uBlock Origin and added that to Eyeo’s dataset to create the the final estimate of desktop adblocking MAUs. It’s important to note that these estimates are still conservative because they do not try to account for wide-spectrum content blockers, VPN/DNS-based adblockers, and network-level adblockers, some of which do not share MAU numbers and are hard to detect on page using any conventional means.

Calculation of Mobile Adblock Users

Whereas the majority of desktop adblocking can be measured via blocklist downloads, the same is not true for mobile, where mobile browsers that block ads by default are the main driver of adblocking. We therefore cannot rely only on Eyeo’s internal estimations of mobile adblocking to present an accurate estimate for adblocking on mobile. This year, the MAU numbers for Brave and Opera were obtained directly from their official releases. Since UC Browser does not release official MAU numbers, we estimated UC Browser’s active users by comparing its traffic share to Opera’s, and then using Opera’s official MAU numbers to create projections for UC Browser. Finally, we added the MAU estimates for UC Browser, Opera, and Brave to a reduced dataset of the internal estimates provided by Eyeo to eliminate any potential double counting.

Analysis of Top 100 US Publishers (update in methodology)

There were two key updates to our methodology for measuring the adblock recovery strategy employed by the Top-100 Comscore-ranked publishers impacted by adblocking. The first update was the creation of an automation script that detected the presence of certain known vendors and technologies, acting as a verification layer to supplement the manual inspection we performed on the sites. The second update involved the removal of sites that rely on subscriptions as their primary monetization model from our analysis. In previous years, such sites were counted as “hardwall-only”. However, on review, we realized that since subscription focused sites operate on an entirely different revenue model, and counting them in this analysis would not make for an apples-to-apples comparison of recovery strategies that are specifically designed to address adblocking.

Adblock Rate by Country and Category

To calculate the adblock rates, we relied on aggregate, anonymized traffic data recorded by Blockthrough on sites where our adblock monetization technology is live. We sourced geo from truncated, depersonalized IP addresses and website category data from a third-party data vendor that Blockthrough uses for website analytics. Blockthrough’s adblock detection script works by making a network call to a small set of predefined “bait URLs”. If the network call(s) to certain bait URLs is blocked, it is assumed that the user has an adblocker active for their current session. While running the data query, we wanted to avoid the effect of seasonality on adblock rates. To achieve this, rather than extracting adblock rate data from a specific window of time, we extracted data collected on the 1st day of every calendar month in 2021. The adblock rates presented in the graph and table are only for desktop devices.

UX Study on Adblock Walls

The UX study on Adblock Walls was conducted with the help of a user testing platform that has a database of thousands of Web users, who can be invited to sessions based on the demographics and attributes configured during the test creation. For the test, we created a flow that required users to browse through a series of websites that currently utilize adblock messaging walls that prompt users to either disable their adblocker or whitelist the site in their settings. We designed the qualification questions for the study participation to filter out users who do not have an adblocker active in their browser. As users joined the sessions, the platform recorded their browser window and commentary. Once the session was complete, the users were requested to fill out a survey that included questions about how adblock walls affected their browsing experience on the test sites. We then combed through all the session recordings and the survey results collected during the entire duration of the test to prepare the information presented in this report.

Acknowledgements

Vishveshwar Jatain

For conducting the data sourcing, planning, analysis, and execution of this report.

Neeraja Shanker

For analysing the adblock recovery strategies utilized by top US publishers.

Jasmine Jia

For providing the data needed to compute adblock rates per online capita, by country, and by category.

Stephan Porz

For helping us analyze and interpret the adblocking estimates that are presented in this report.

Ben Williams

For providing data related to country-level adblocking estimates and Acceptable Ads opt-ins.

Duncan Arthur

For facilitating Blockthrough's participation in the RevOps Barometer survey and re-print permissions for this report.

StatCounter

Thank you to the StatCounter team, who generously make a wealth of Internet analytics available for free.