

@johnnyryan



SOLVE FOR CONSUMER
& SOLVE FOR PUBLISHER
**DIGITAL CONTENT NEXT LEGAL &
LEGISLATIVE DAY 2016, WASHINGTON DC**

@johnnyryan

pre-2012

Background: created the technology to enable huge multiplayer games.

Was used in many games like....

The logo for Call of Duty, featuring the words "CALL OF DUTY" in a bold, metallic, 3D font with a weathered texture. The letters are primarily blue and grey with yellow highlights.The Activision logo, consisting of the word "ACTIVISION" in a bold, grey, sans-serif font with a registered trademark symbol.The Guitar Hero logo, featuring the words "GUITAR HERO" in a stylized, gothic, white font with black outlines and a 3D effect.

PageFair team working
on adblocking since
2010. Established
PageFair in **2012**.



48% growth from 2014-15
45 million monthly active
users in Q2 2015
15% adblock penetration



45 M

20 M

Jan 2013

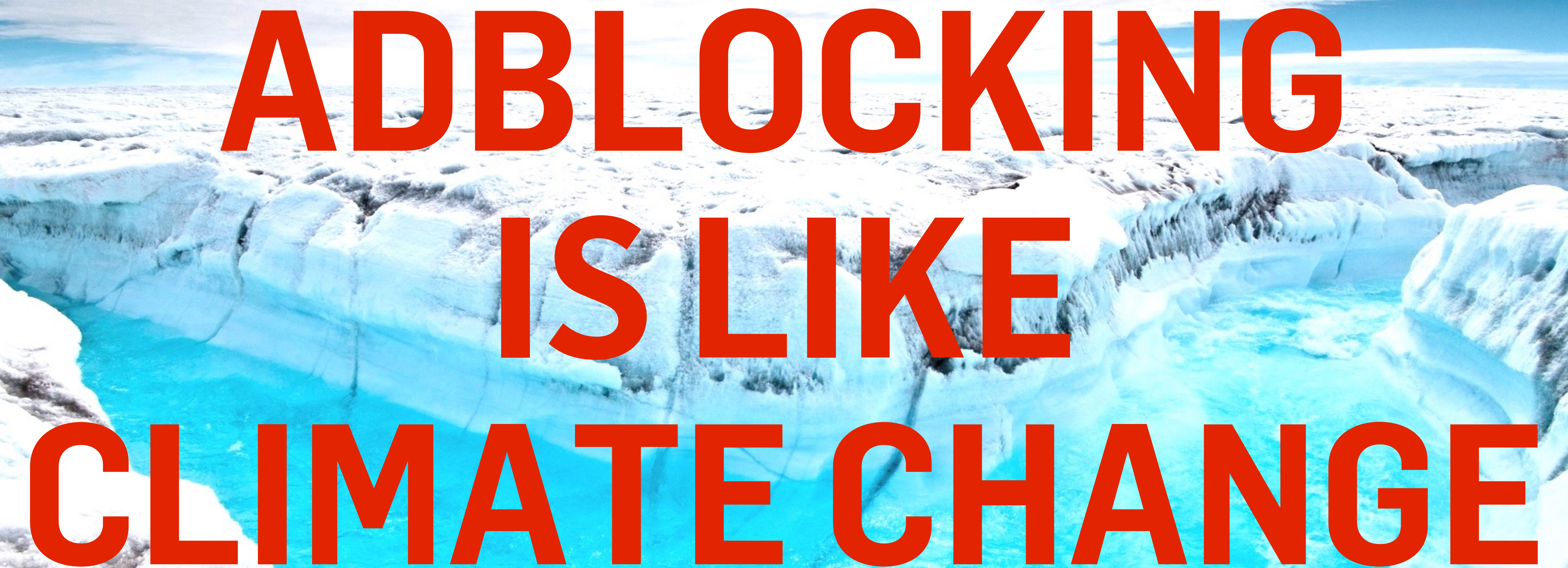
Jan 2014

Jan 2015

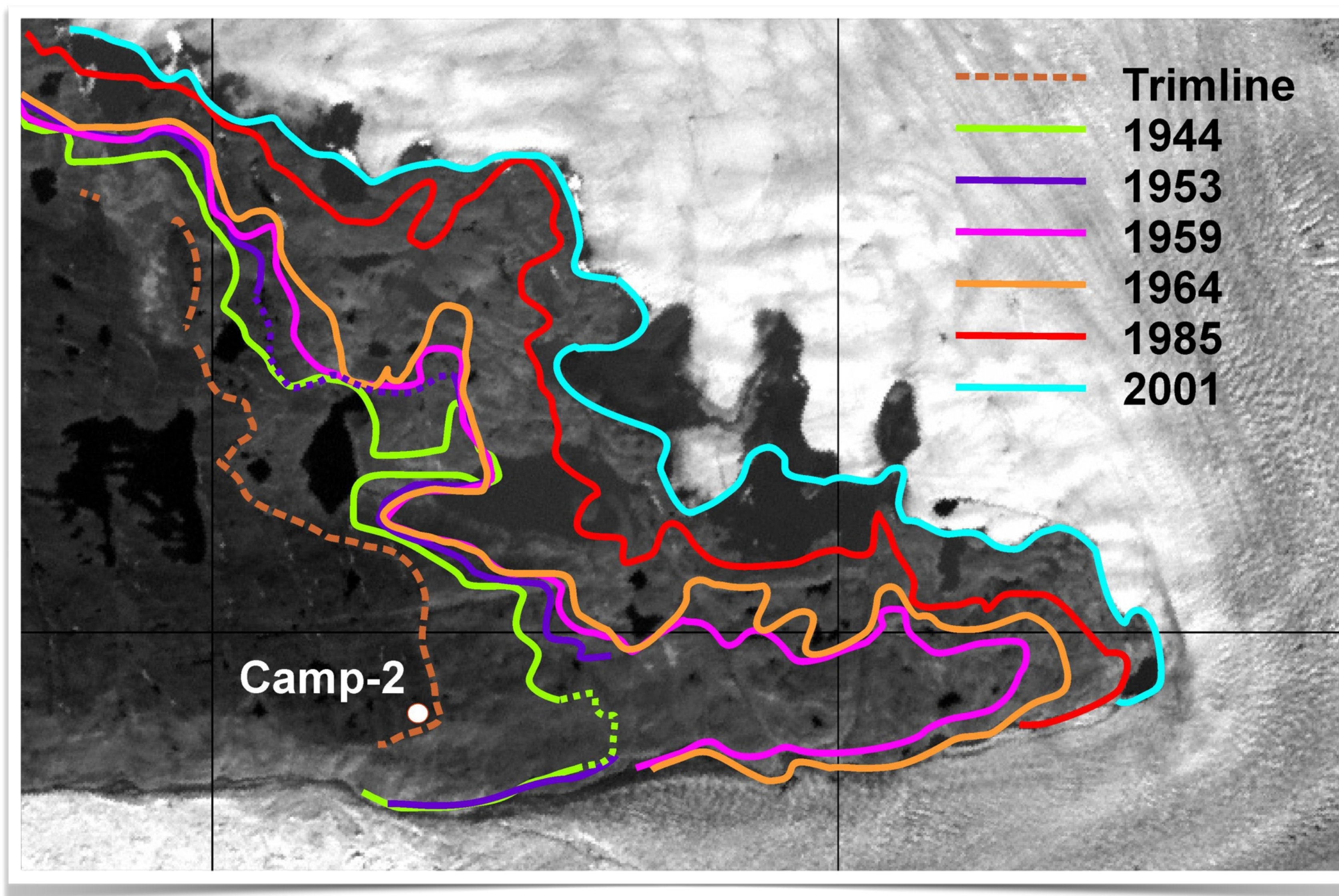


Linear. Not
exponential.

**NOT THE
“ADPOCALYPSE”**



**ADBLOCKING
IS LIKE
CLIMATE CHANGE**





**ADTECH IS
FOCUSED ON
SHORT TERM
WINS.**



CRISIS OF THE COMMONS

**WILL YOUR NEXT
CAMPAIGN DO THIS?**

Ad block users

200 M

100 M

50 M

source:
PageFair

mid 2009

mid 2011

mid 2013

mid 2015



Digital video ad spend

Ad block users

200 M

100 M

50 M

mid 2009

mid 2011

mid 2013

mid 2015

\$1.4B

\$2B

\$2.9B

\$4.1B

\$5.9B

\$7.7B

source:
PageFair
eMarketer

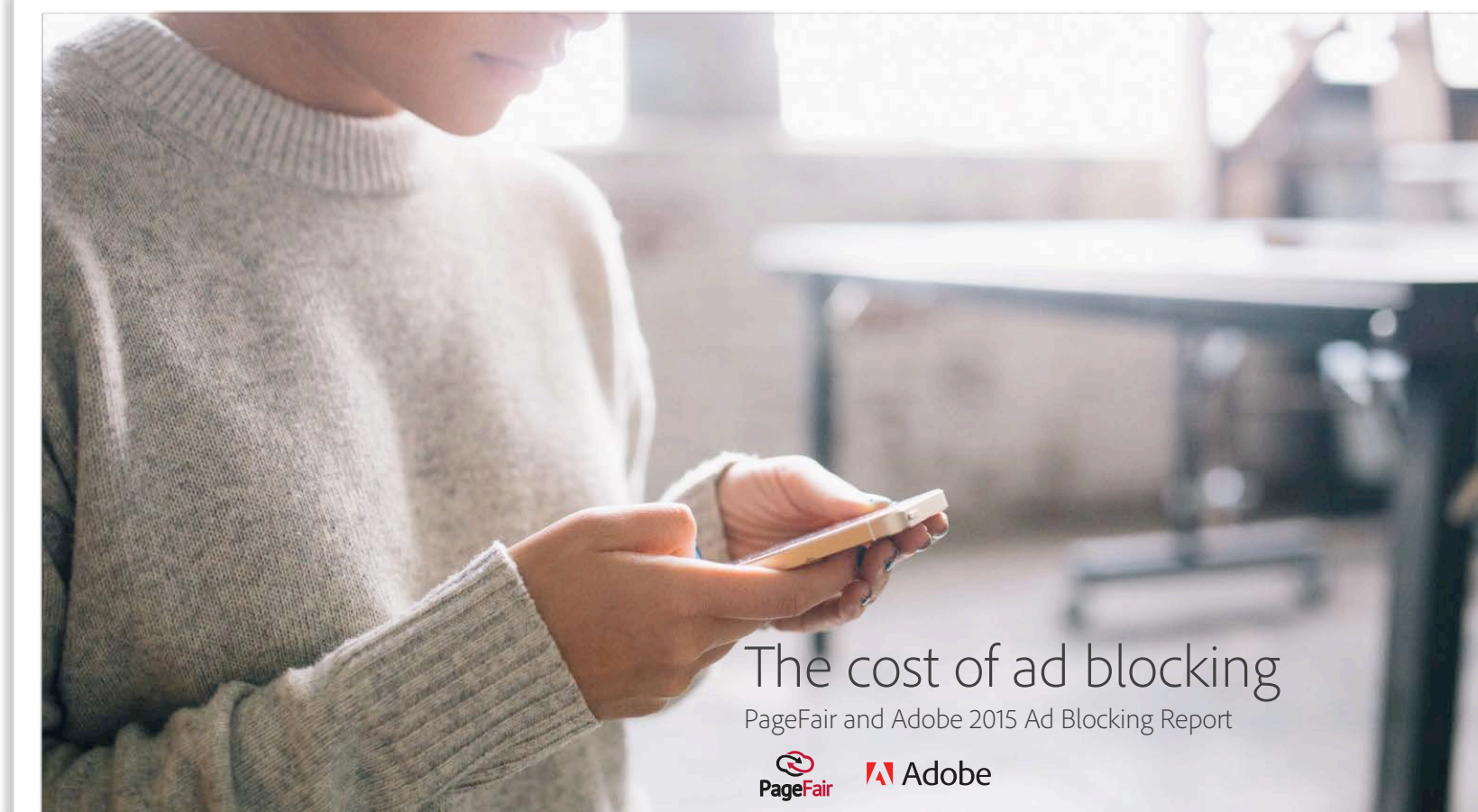




2013



2014



2015

80%

learn about ad blocking from
friends / web / social media

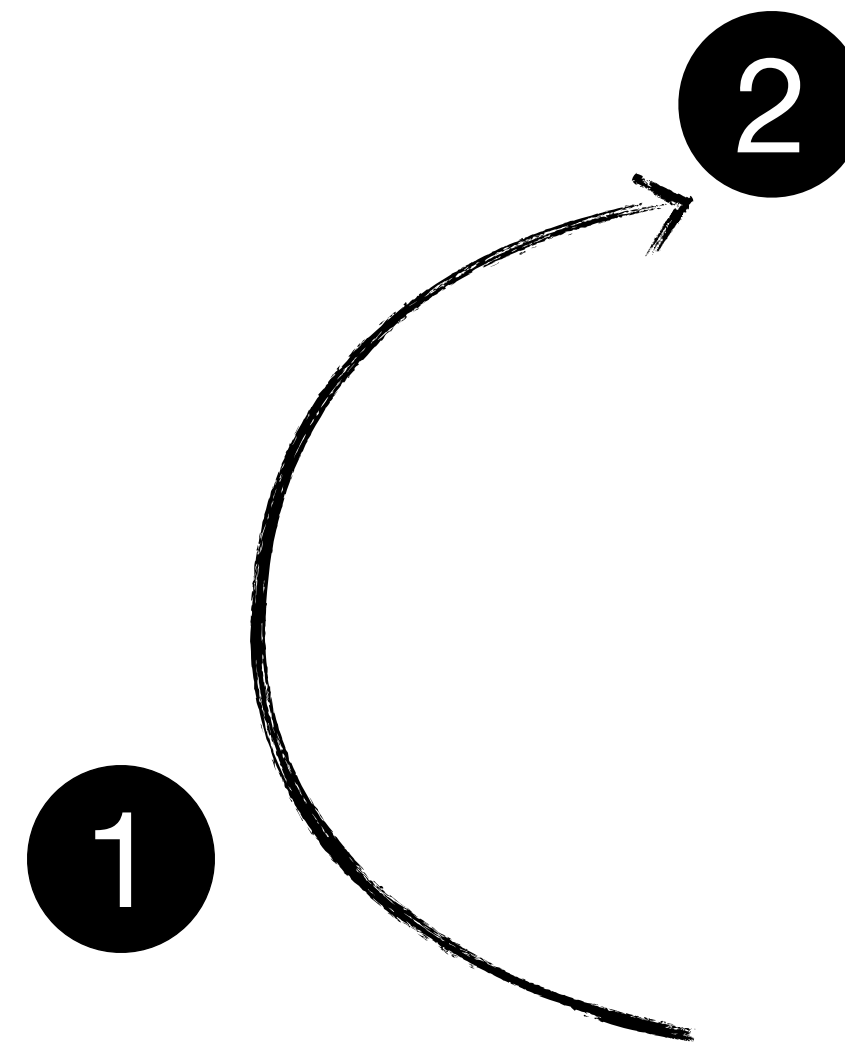
WHY

The need to monetize has
led to unrestrained
advertising.

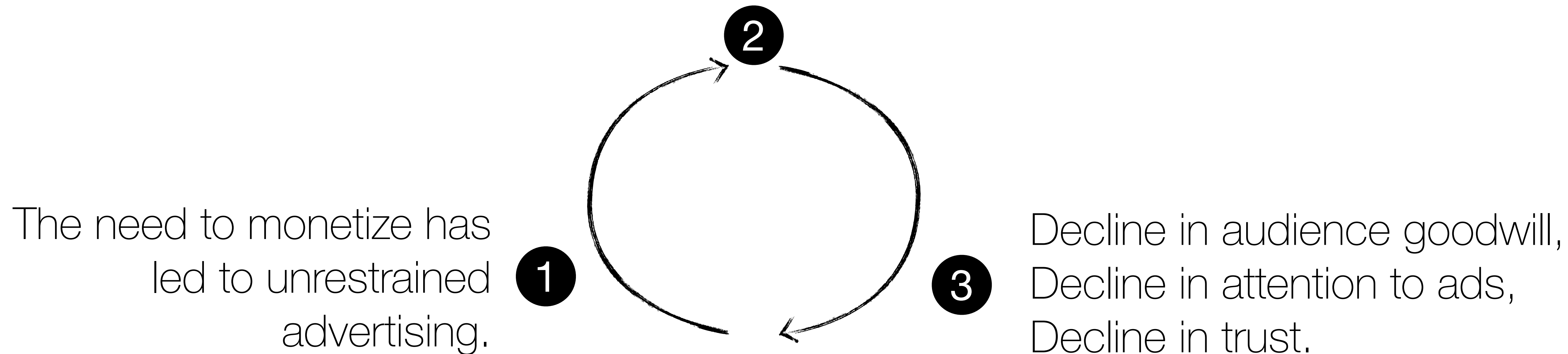
1

Increase in ad volume and page clutter.
Increase in experience interruption.
Increase in data snooping.

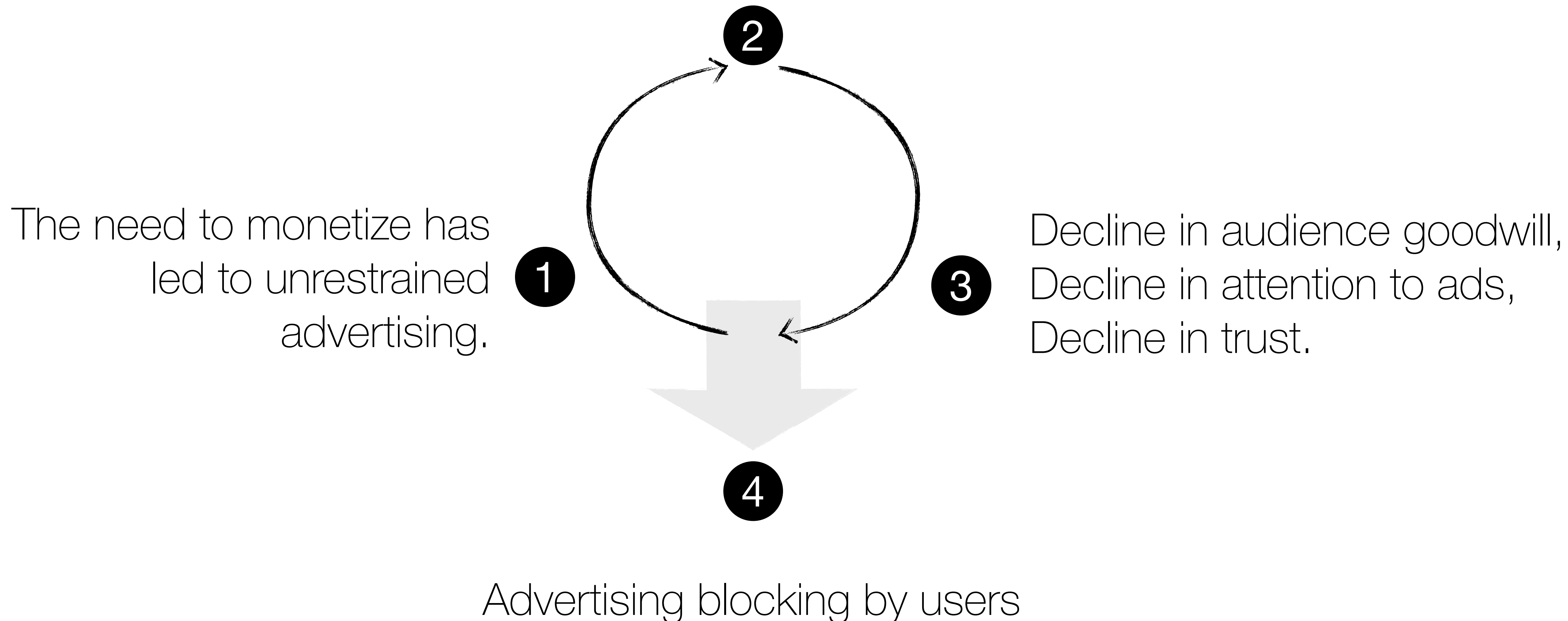
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Increase in ad volume and page clutter.
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Increase in ad volume and page clutter.
Increase in experience interruption.
Increase in data snooping.



Why people block

(no order)

- Ads obscure content.
- Privacy.
- Bandwidth.
- Slow website load.
- Security.

Why people block

(no order)

- Ads obscure content.
- Privacy.
- Bandwidth.
- Slow website load.
- Security.
- Because they can.



Remote Control for TV

Fig. 1. The Emerson model 1158 remote-control unit shown here is capable of duplicating all of the TV set's front panel adjustments for picture and sound.

By
WALTER H. BUCHSBAUM
Television Consultant
RADIO & TELEVISION NEWS

In many cases these units are furnished with the set, but, they can be installed by any service technician.

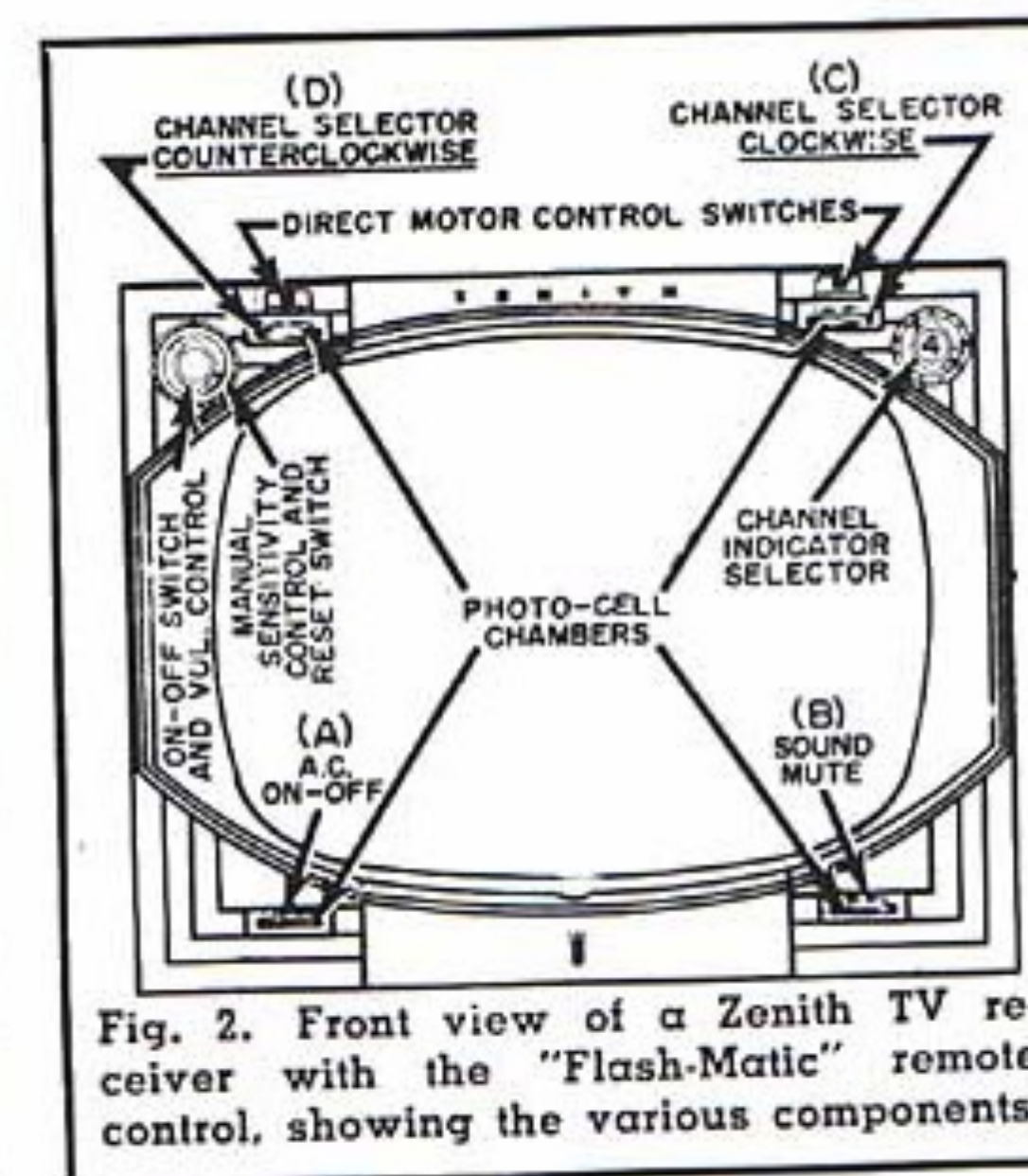
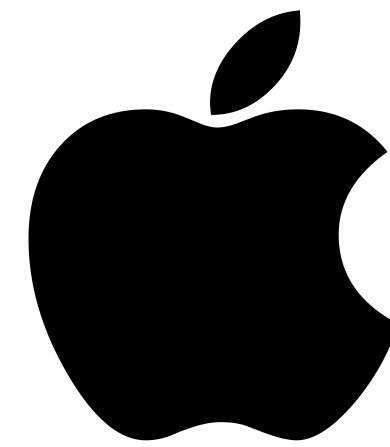


Fig. 2. Front view of a Zenith TV receiver with the "Flash-Matic" remote control, showing the various components.

MOBILE

Device manufacturers implementing mobile blocking



Apple

Sept. 2015

298 M devices
(2016)

Mobile browser(s)
with blocking by default



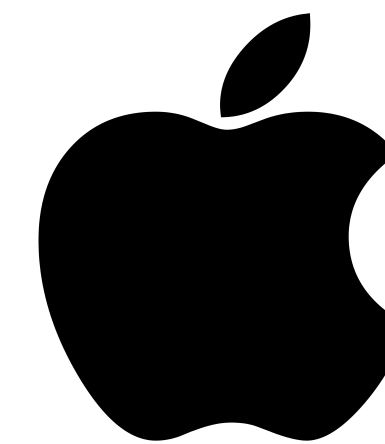
UC Browser

ver 9.9.2

Aug. 2014

100s of millions of users
(2016)

Device manufacturers
implementing mobile blocking



Apple

Sept. 2015

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Mobile browser(s)
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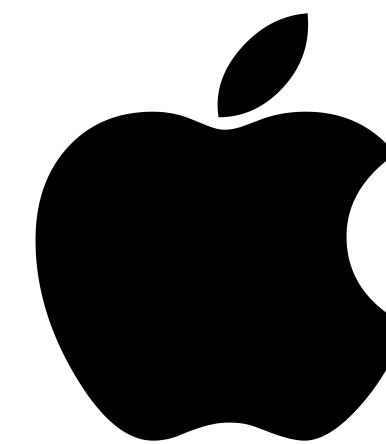
UC Browser

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Sept. 2015

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(2016)



Samsung

Jan. 2016

320 M
devices (2015)

Mobile browser(s)
with blocking by default



UC Browser

ver 9.9.2

Aug. 2014

100s of millions of users
(2016)

Device manufacturers
implementing mobile blocking

User-installation required



Apple

Sept. 2015

298 M devices
(2016)



Samsung

Jan. 2016

320 M
devices (2015)

Pre-installed by manufacturer



Asus

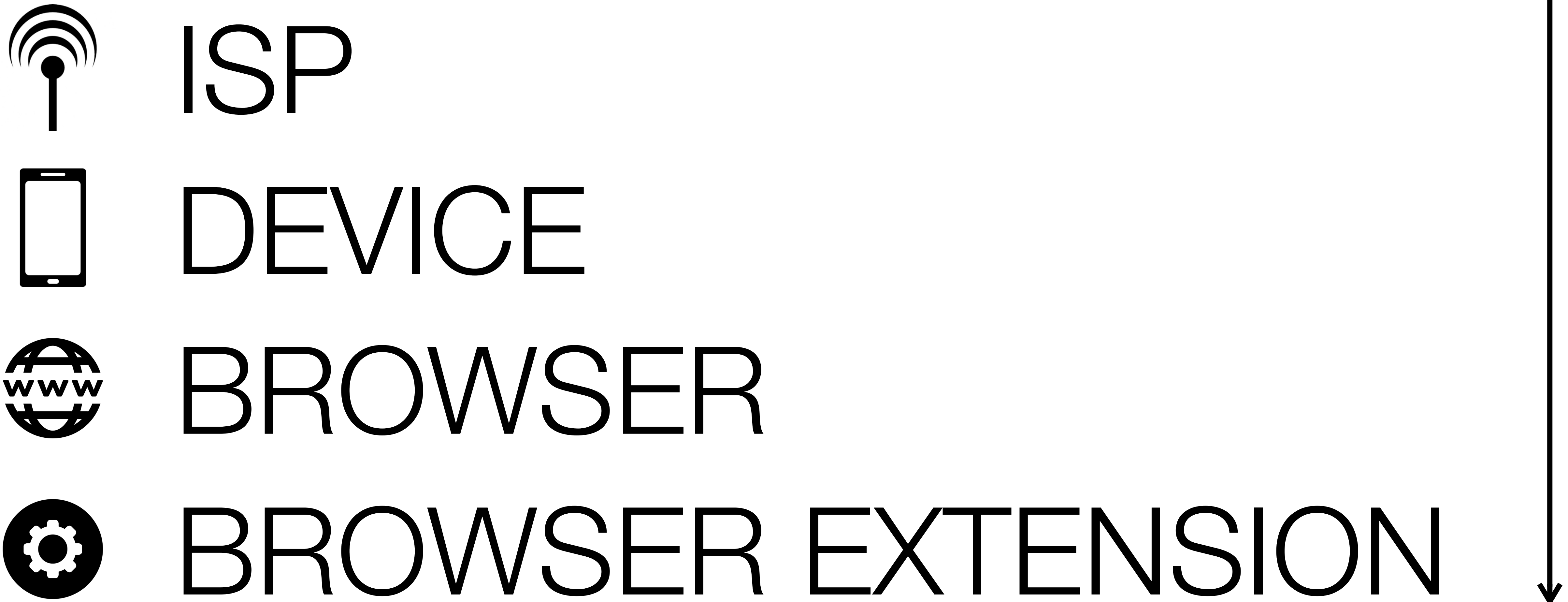
Dec. 2015

?

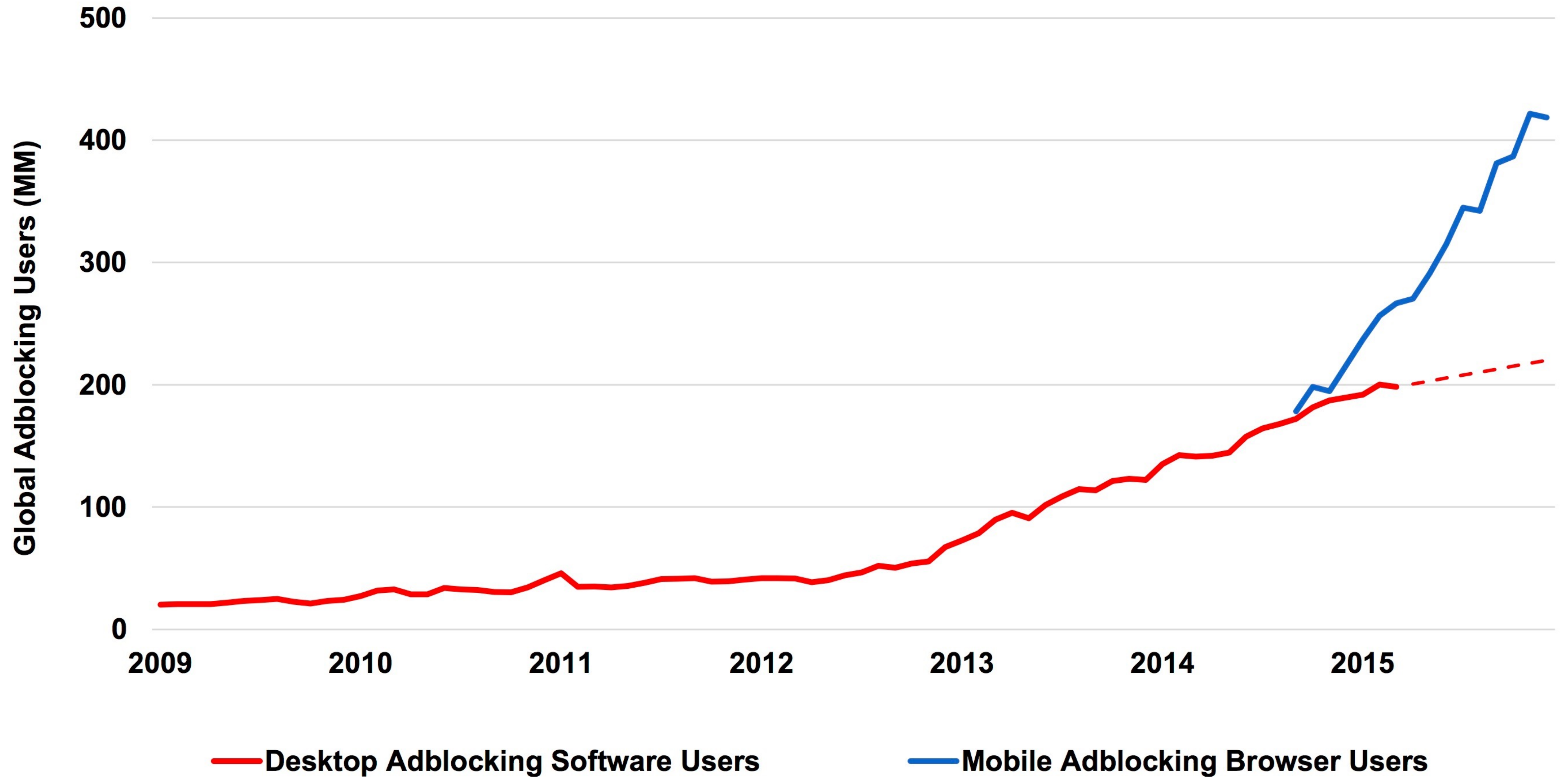
30 M
devices (2016)
excluding China

Hierarchy of main blocking methods

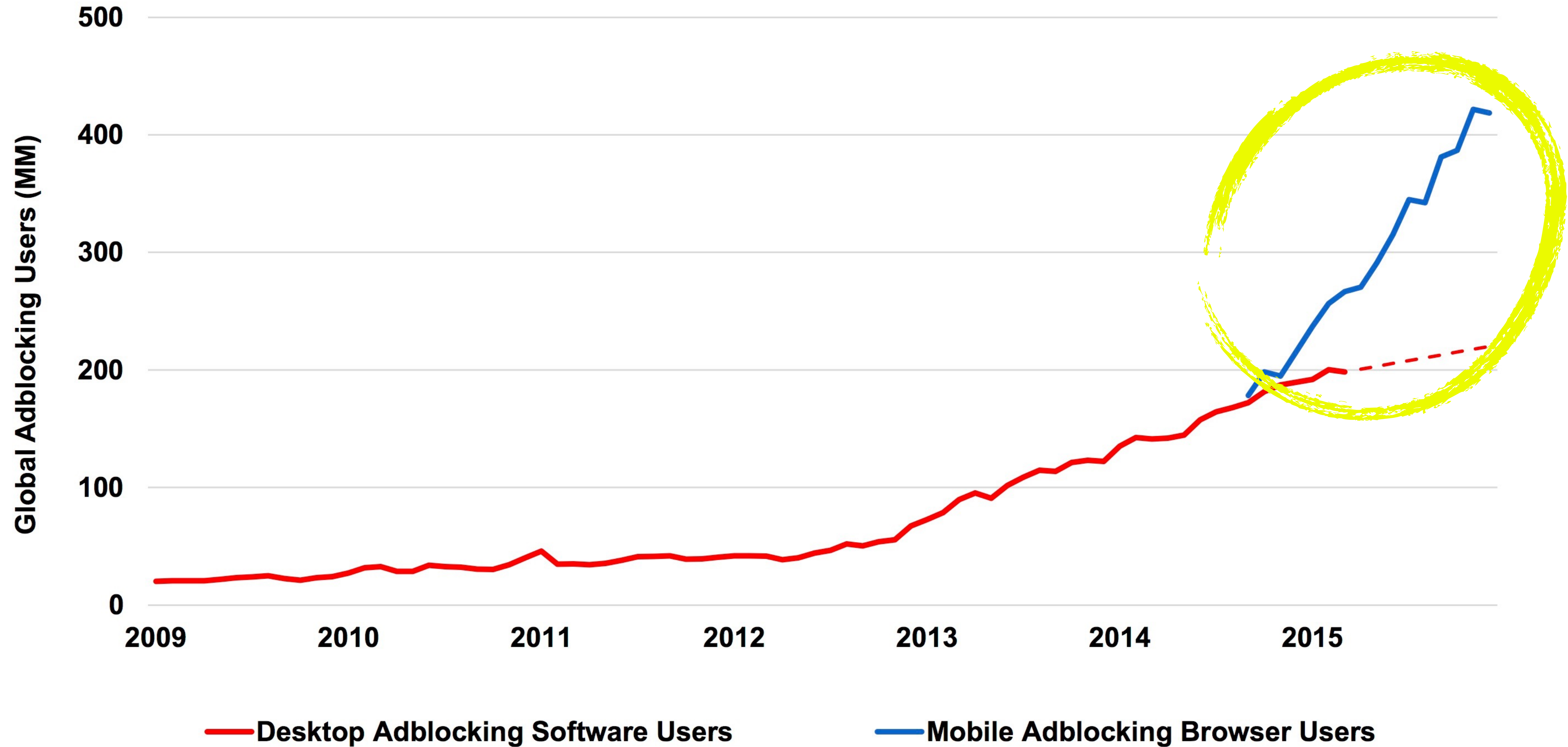
Hierarchy of main blocking methods



Global Adblocking Users on Web (Mobile + Desktop), 4/09 – 3/16



Global Adblocking Users on Web (Mobile + Desktop), 4/09 – 3/16



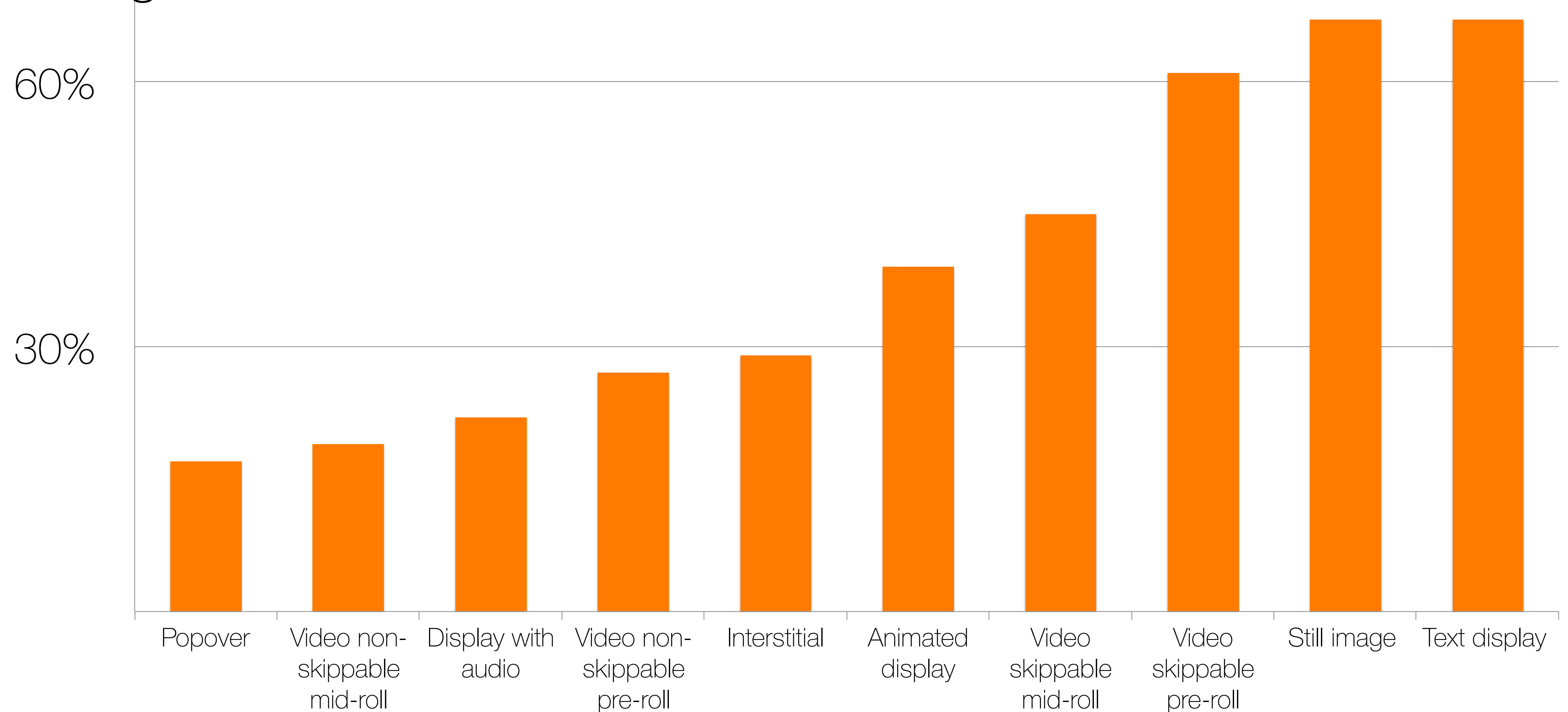
THE
GOOD NEWS

AD SERVING TECHNOLOGY
THAT CAN NOT BE
CIRCUMVENTED BY
ADBLOCKERS

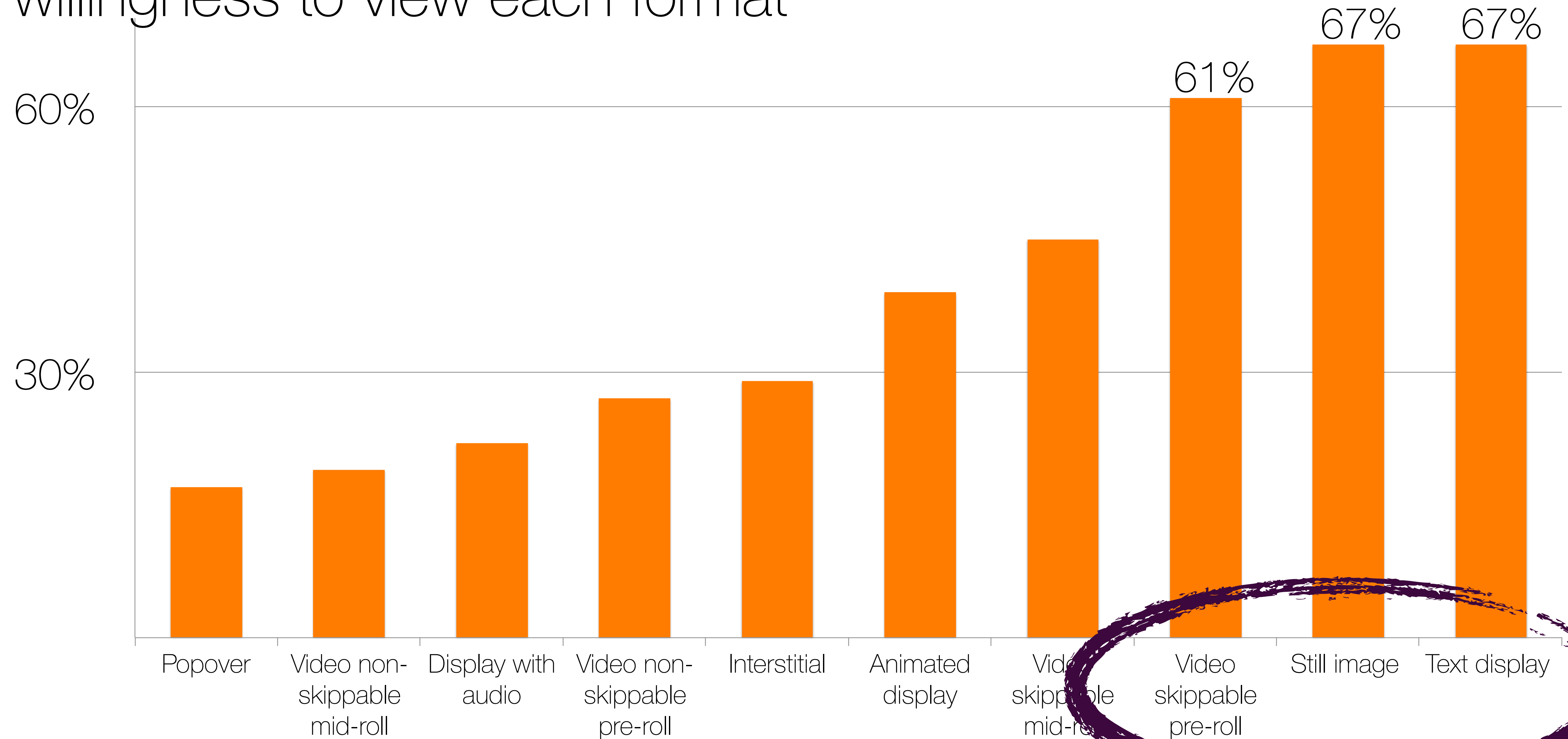
ARID WASTELAND



% of adblock users who expressed a willingness to view each format

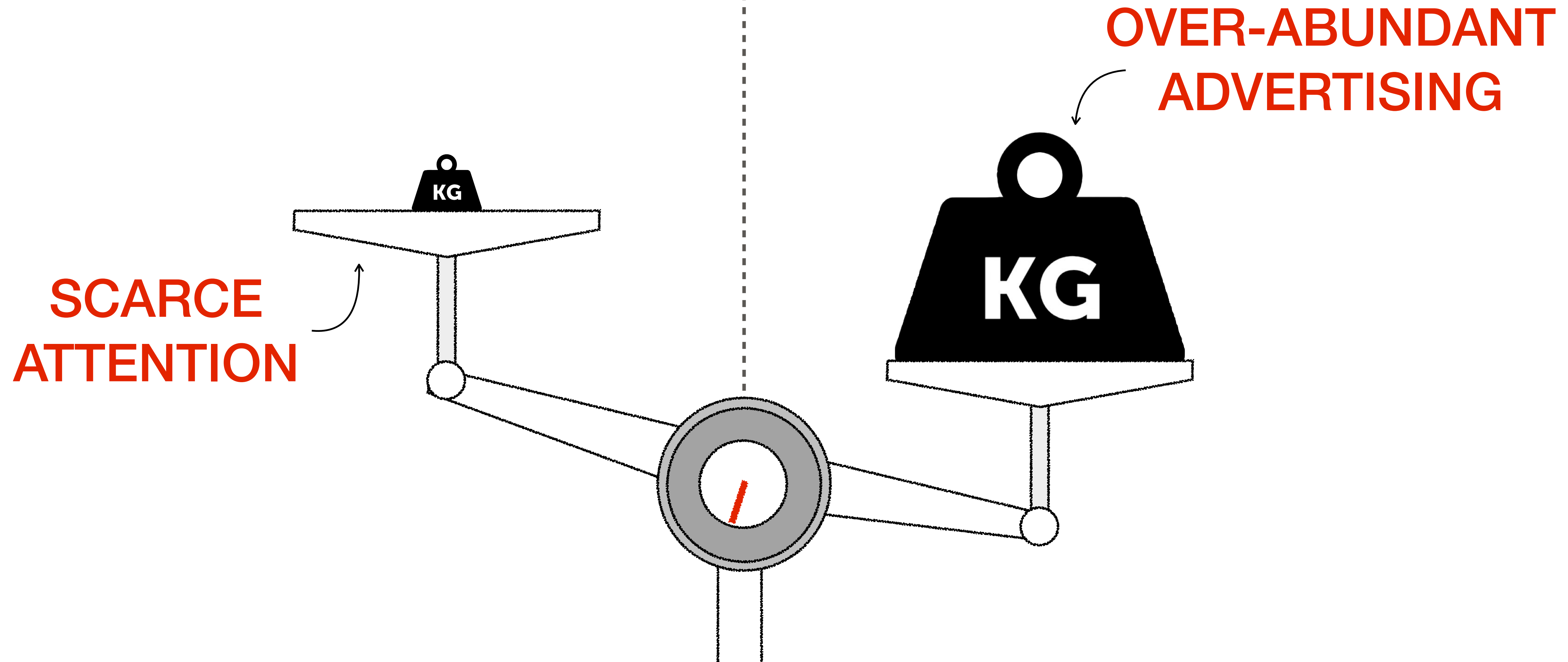


% of adblock users who expressed a willingness to view each format

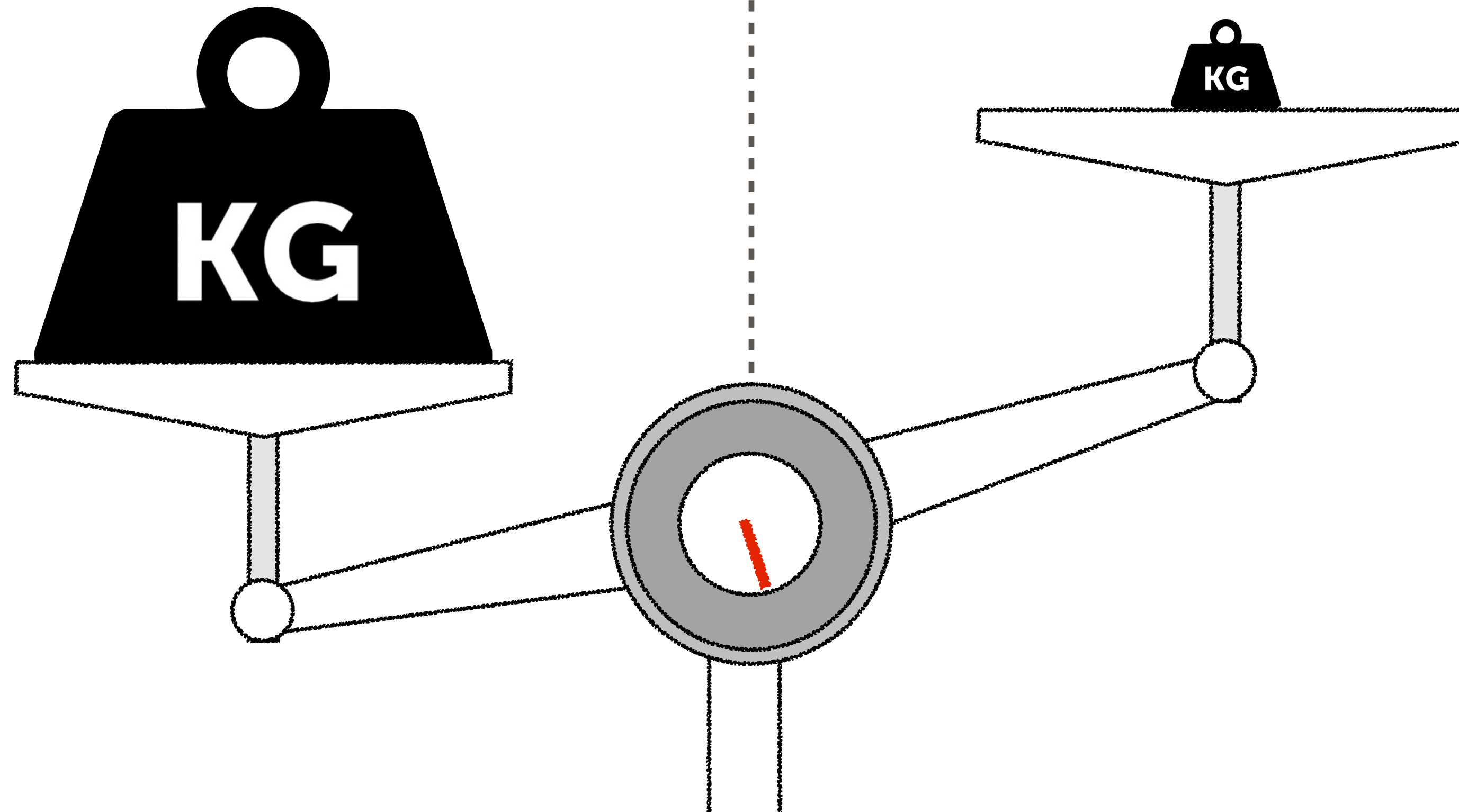


ATTENTION DEFICIT

ATTENTION V ADVERTISING

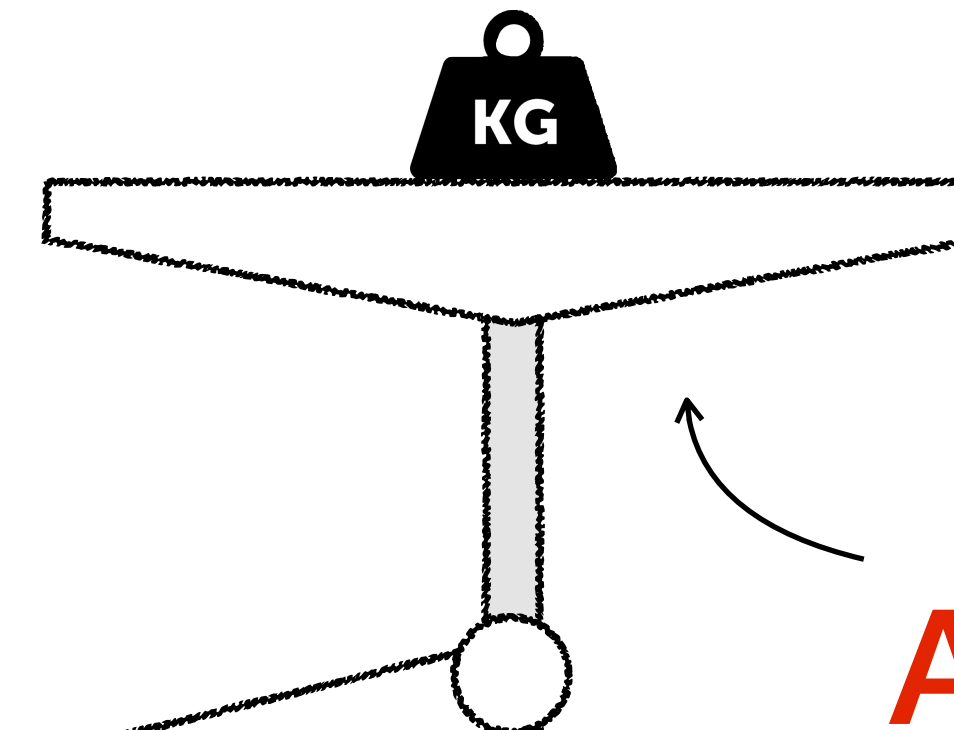
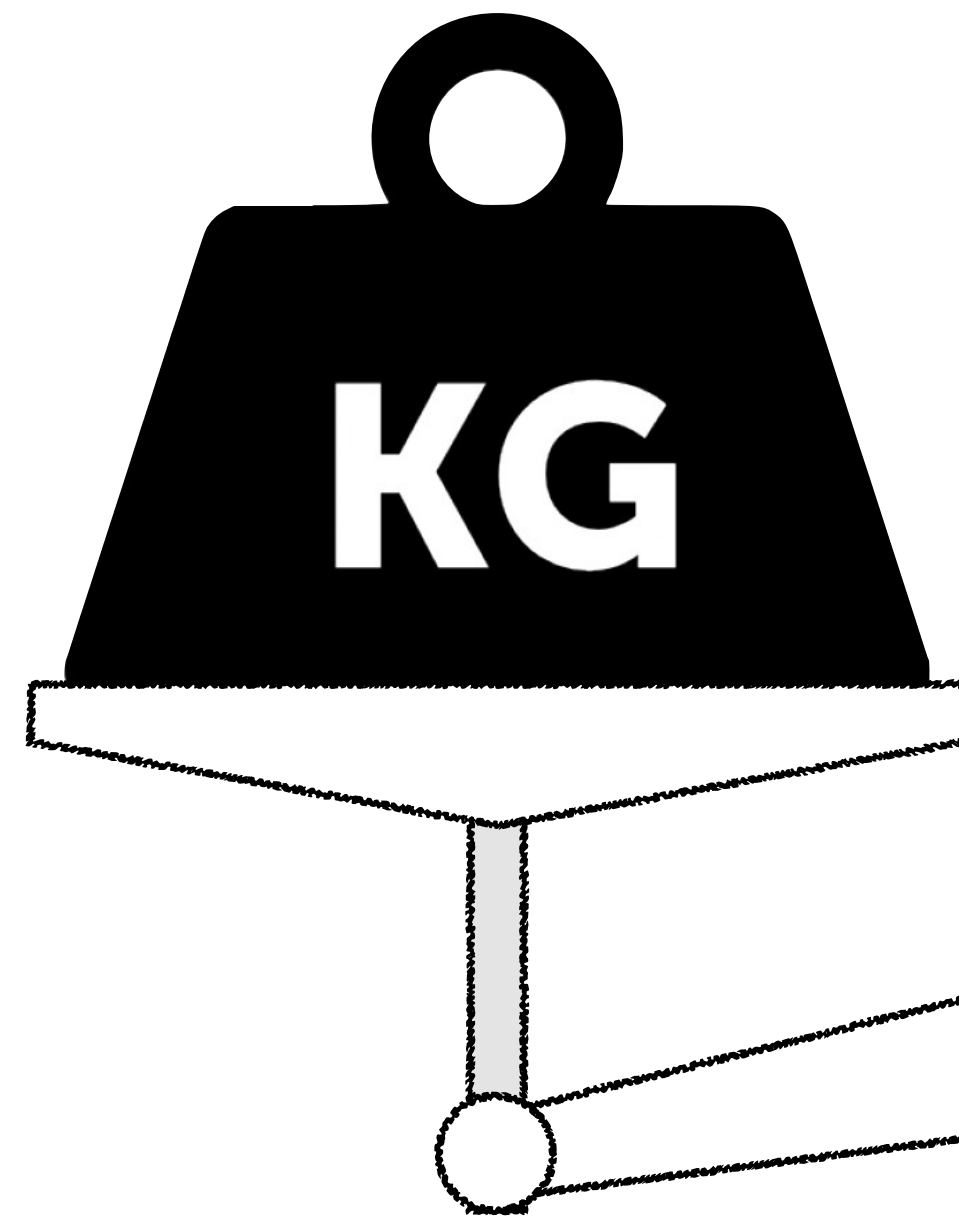


ATTENTION V ADVERTISING

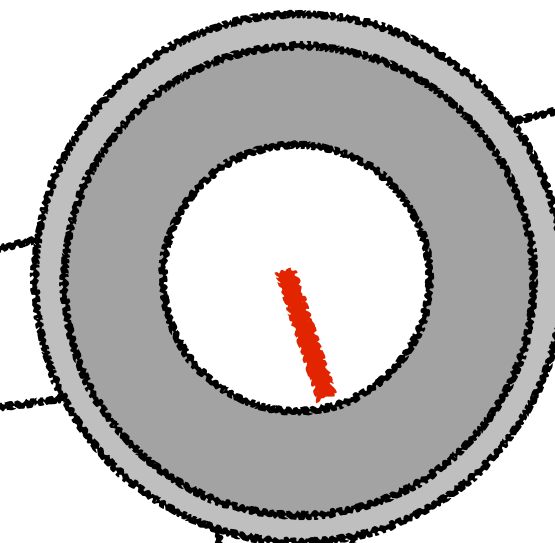


ATTENTION V ADVERTISING

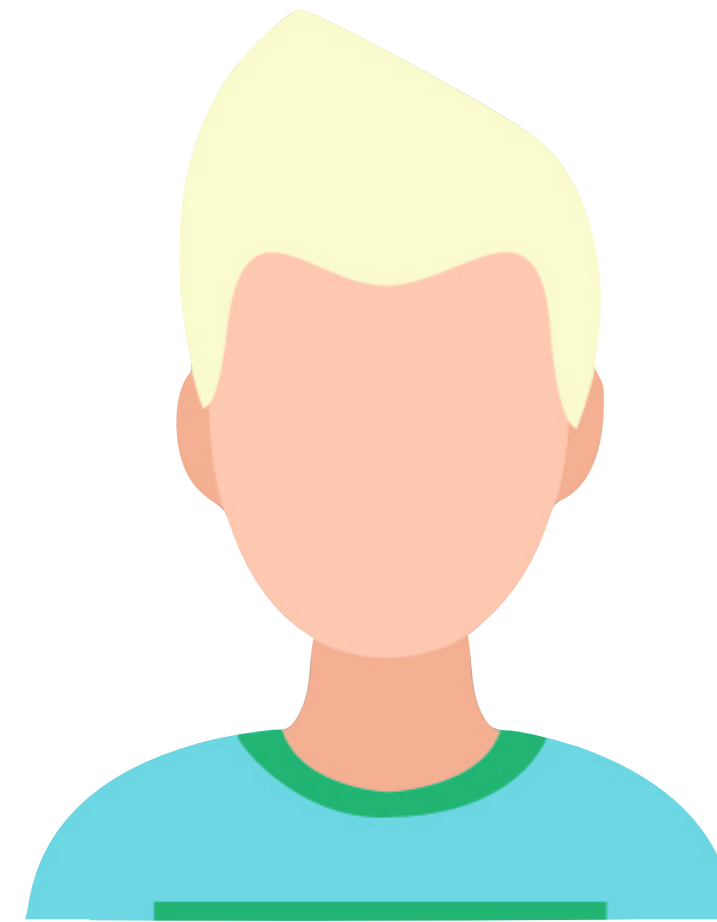
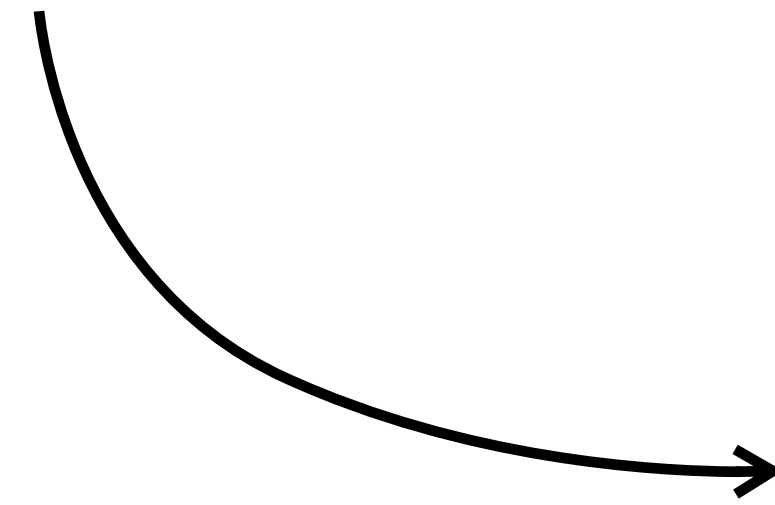
ABUNDANT
ATTENTION



SCARCE
ADVERTISING



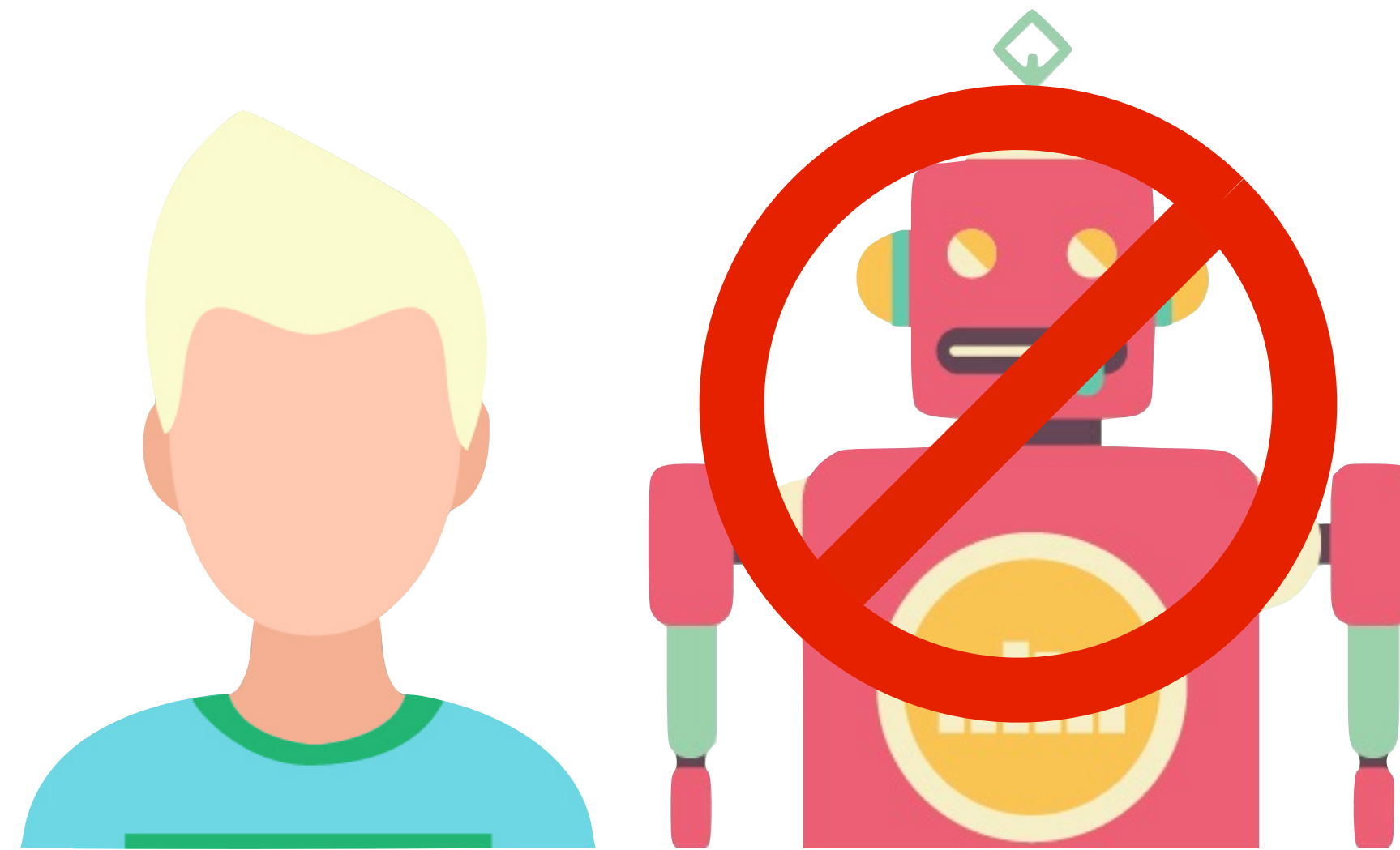
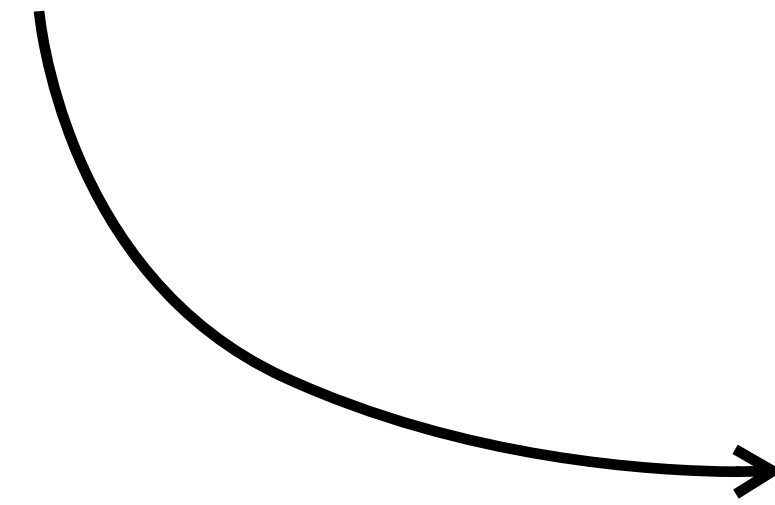
Adblock user



Attention = PLENTIFUL.

Ads = SCARCE.

Adblock user



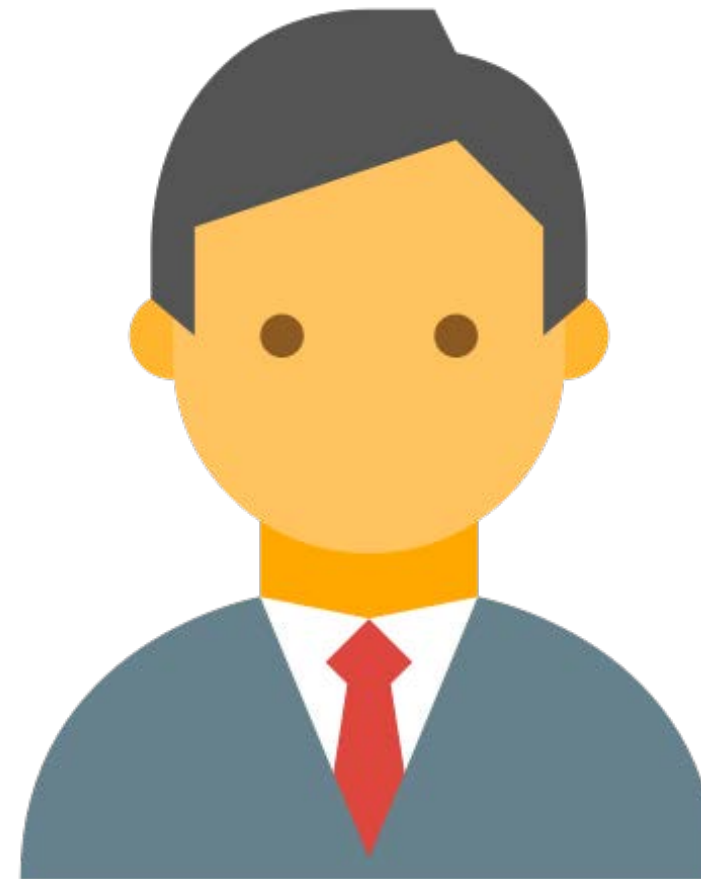
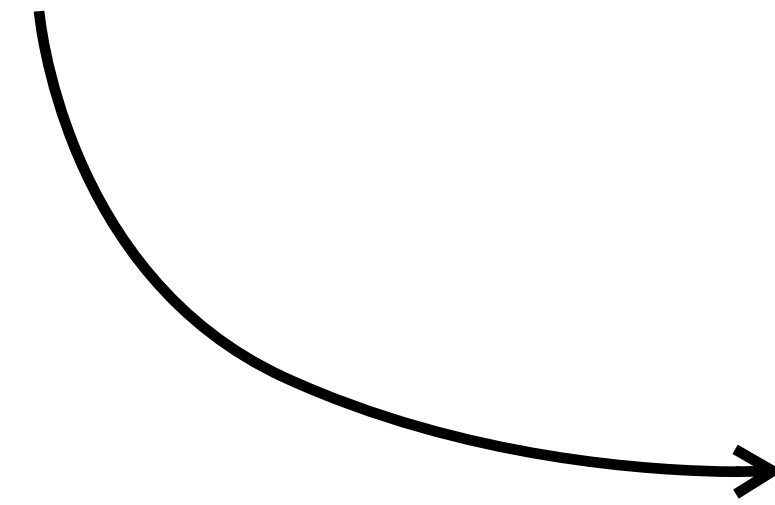
Attention = PLENTIFUL.

Ads = SCARCE.

Definitely human.

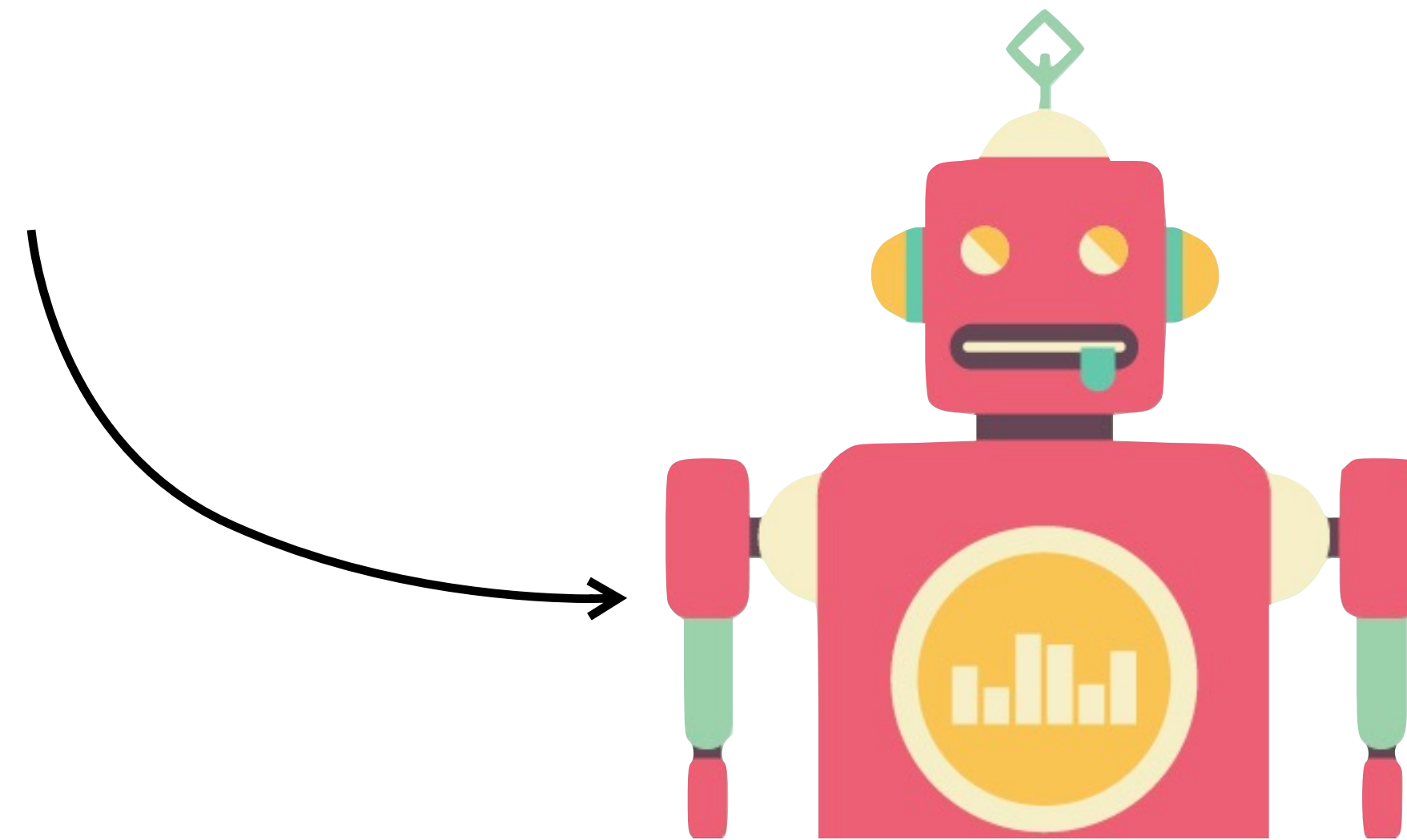
Normal
person

Normal
person



Attention = SCARCE.
Ads = OVERABUNDANT.

Normal
person



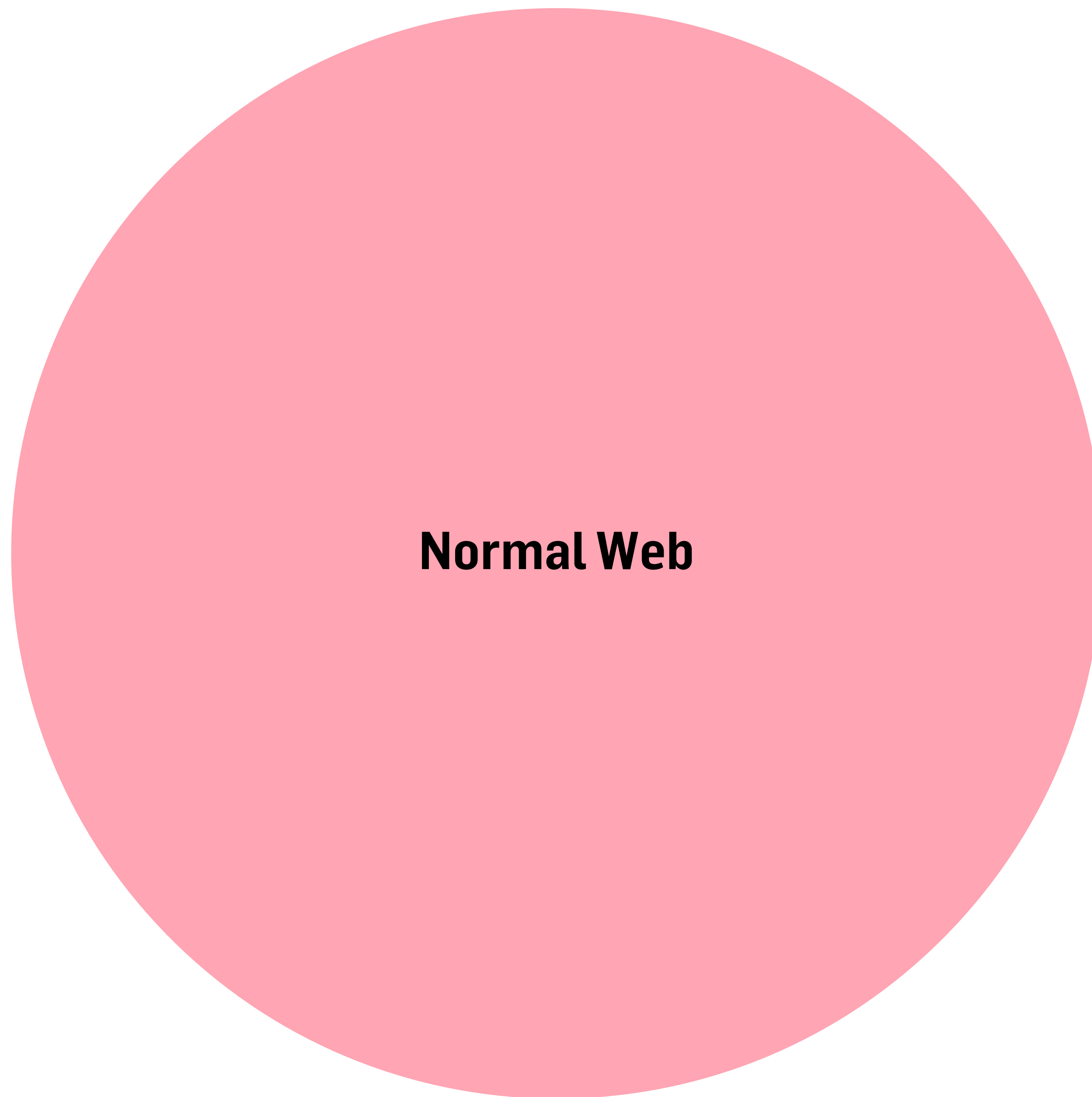
Attention = SCARCE.
Ads = OVERABUNDANT.
(Could even be a robot!)

ADVERTISING 2.0

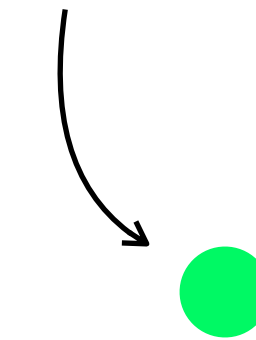
“THE BLOCKED

WEB”

Normal Web



Blocked Web

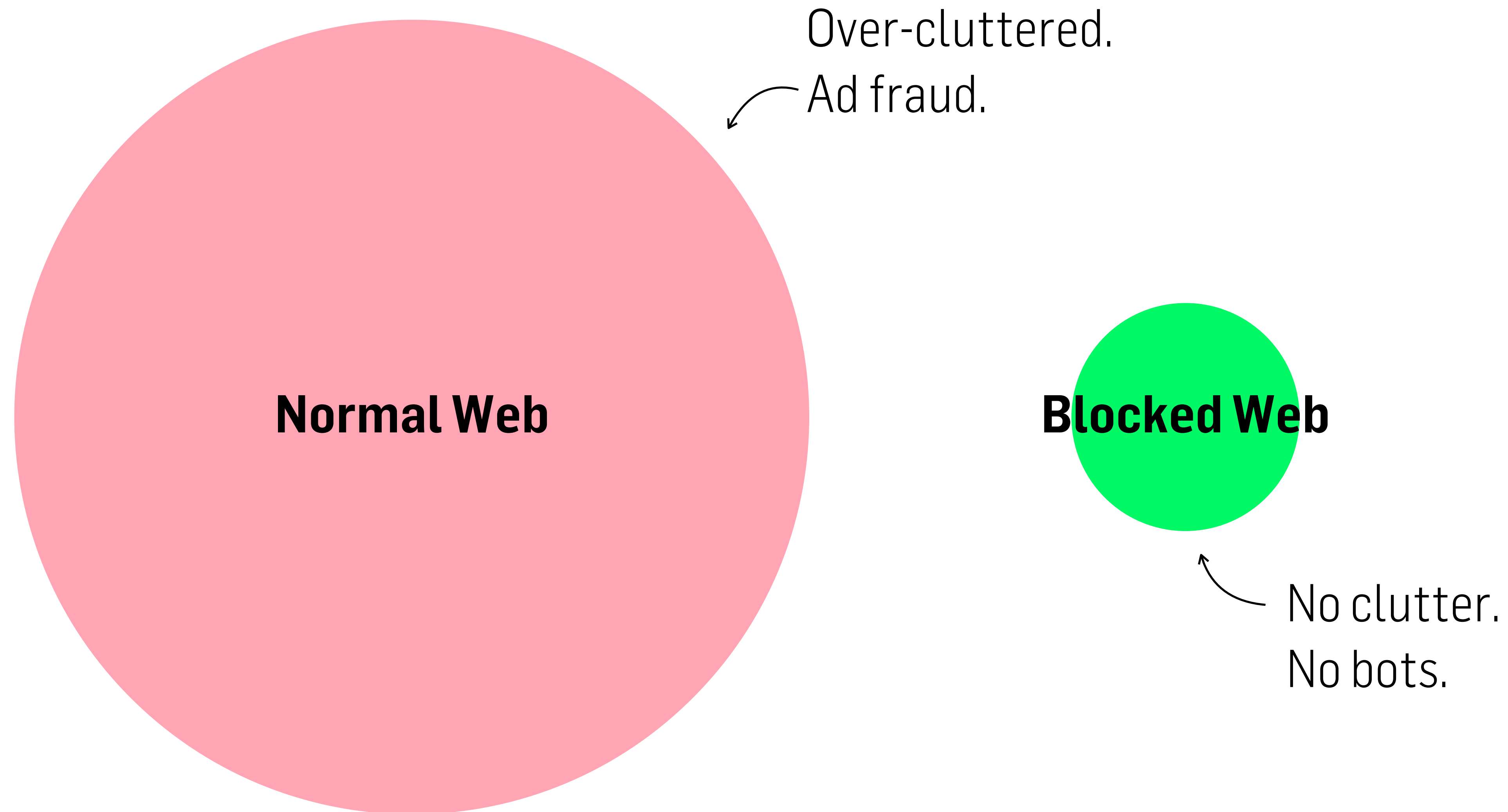




Normal Web



Blocked Web



The 'blocked web' is steadily growing, creating a new, premium space

PageFair Global Stakeholders' Roundtables

Consumer groups, Publishers, Browsers, Agencies, Advertisers

World Federation of Advertisers, the 4A's, Digital Content Next, the World Association of Newspapers, the National Newspaper Association, International Federation of Periodical Publishers, Havas, Google, Mozilla, the Centre for Democracy and Technology, the EFF, the Open Rights Group, the European Commission, the UK Government, the World Economic Forum, and many others including the global advertising holding companies.

London

September 2015



**FINANCIAL
TIMES**

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FINANCIAL
TIMES

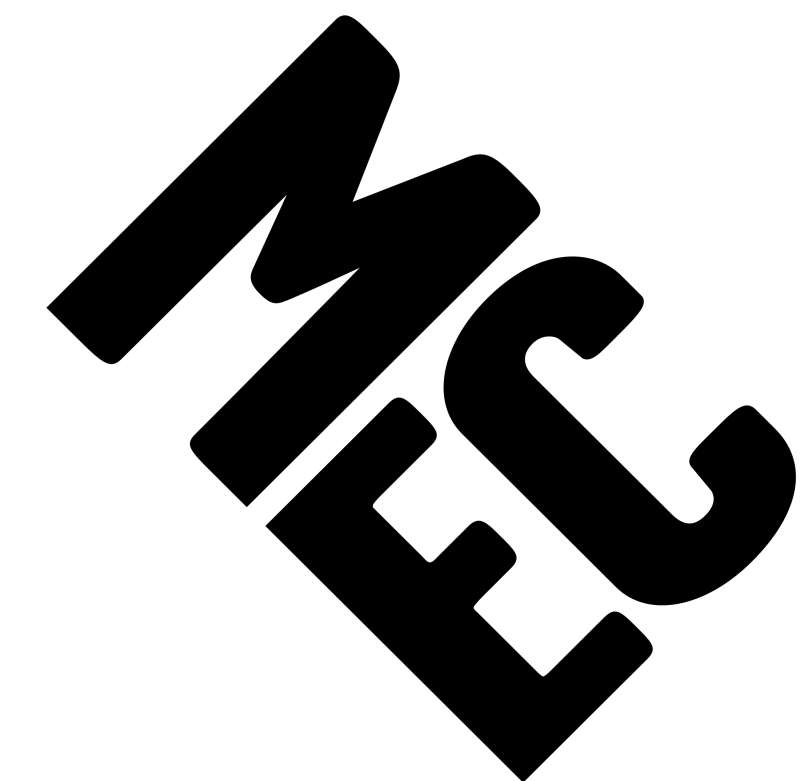
London

March 2016

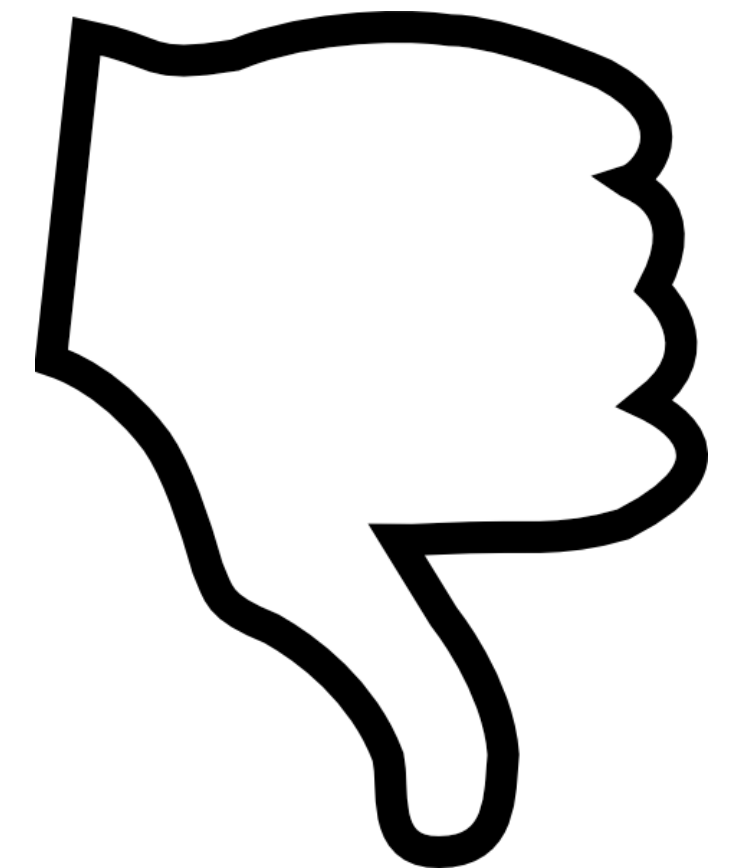
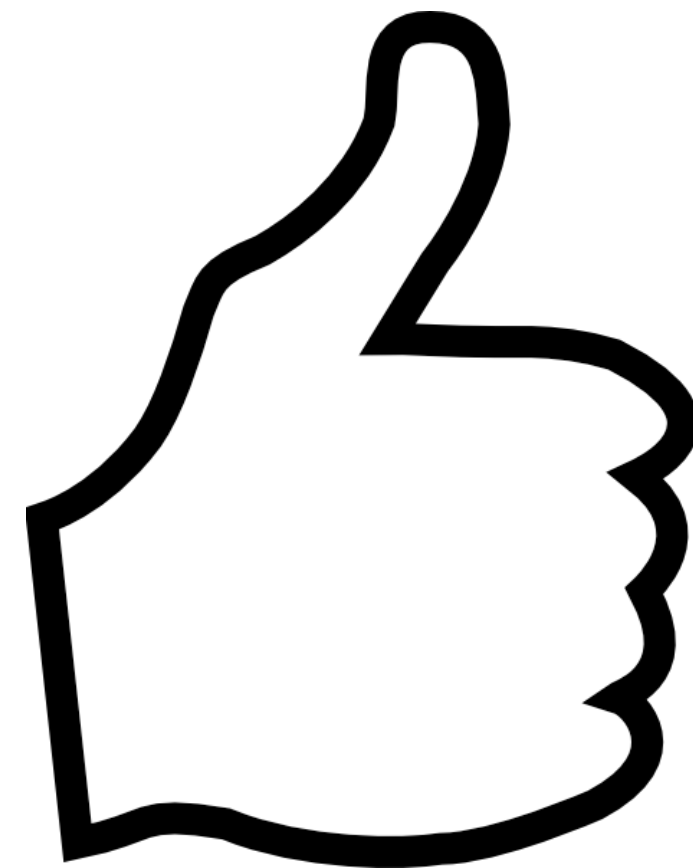
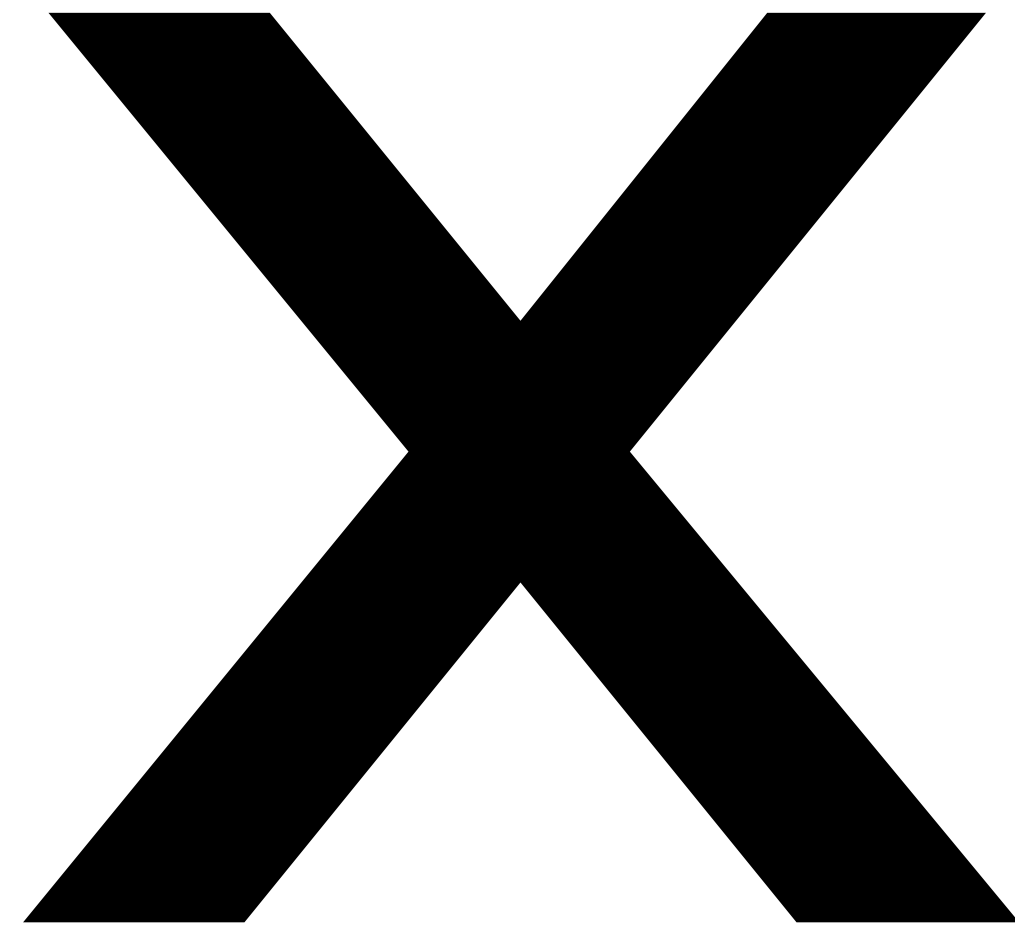
mozilla

New York

April 2016

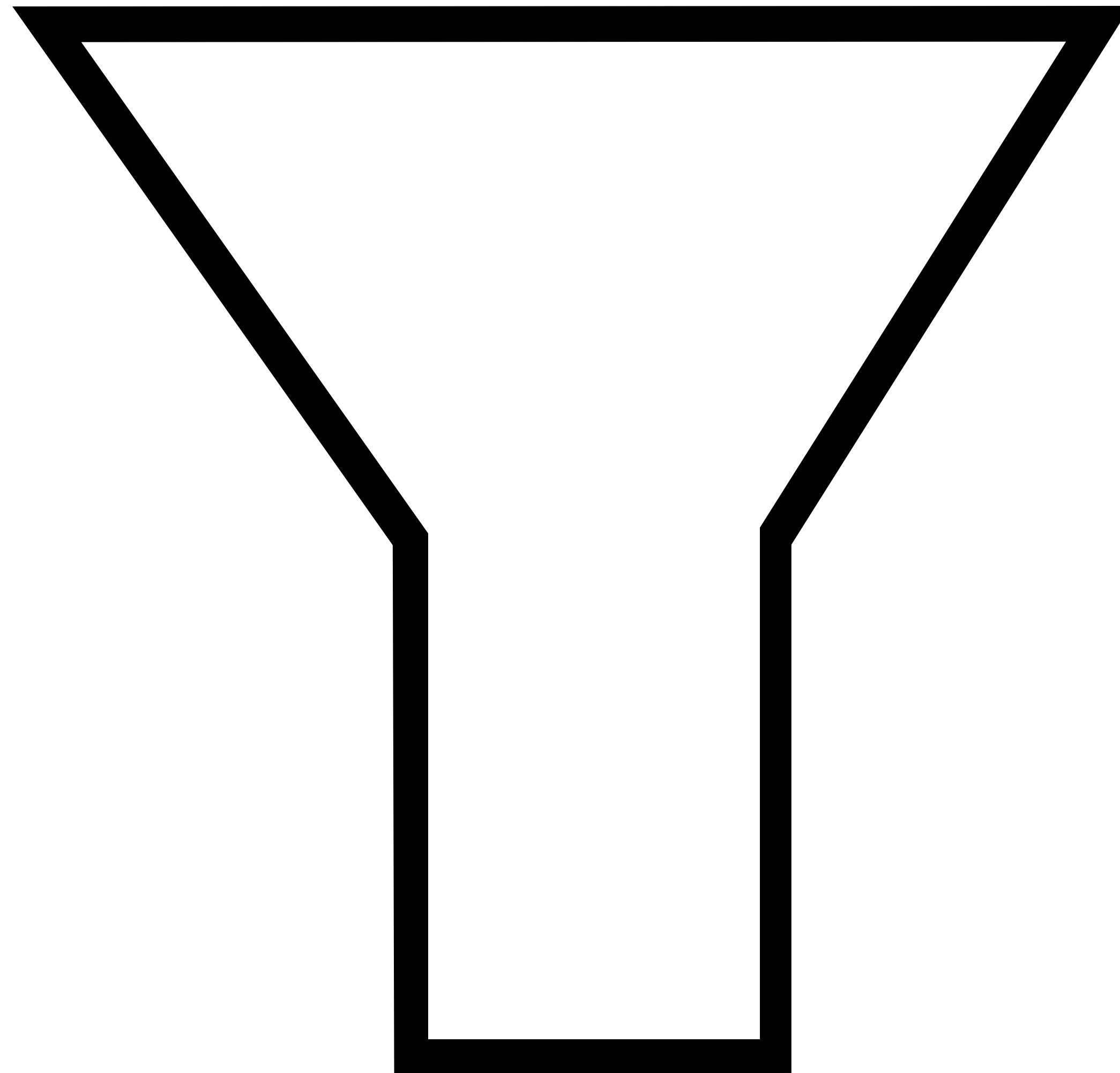


IMMEDIATE TOOLS





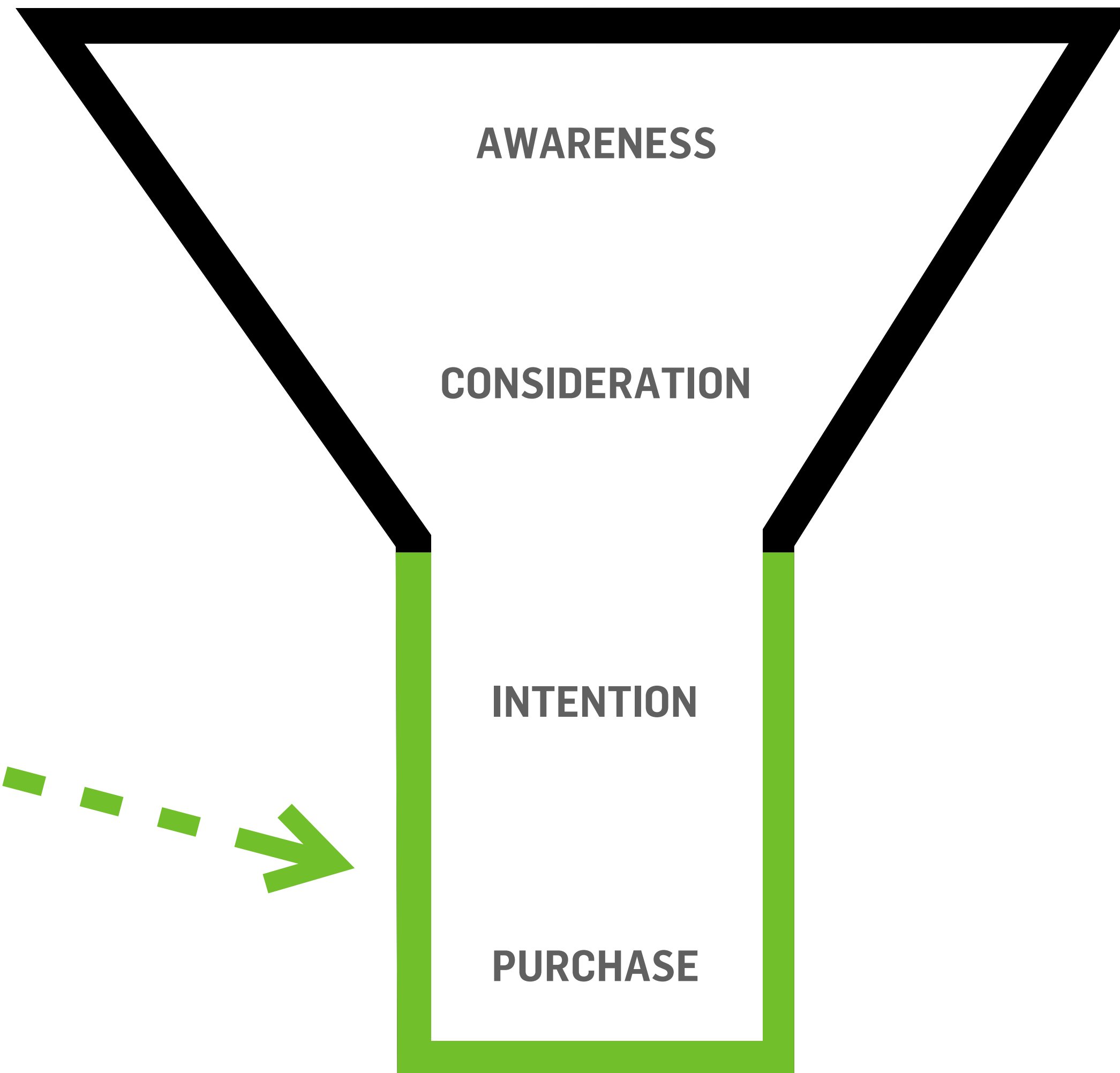
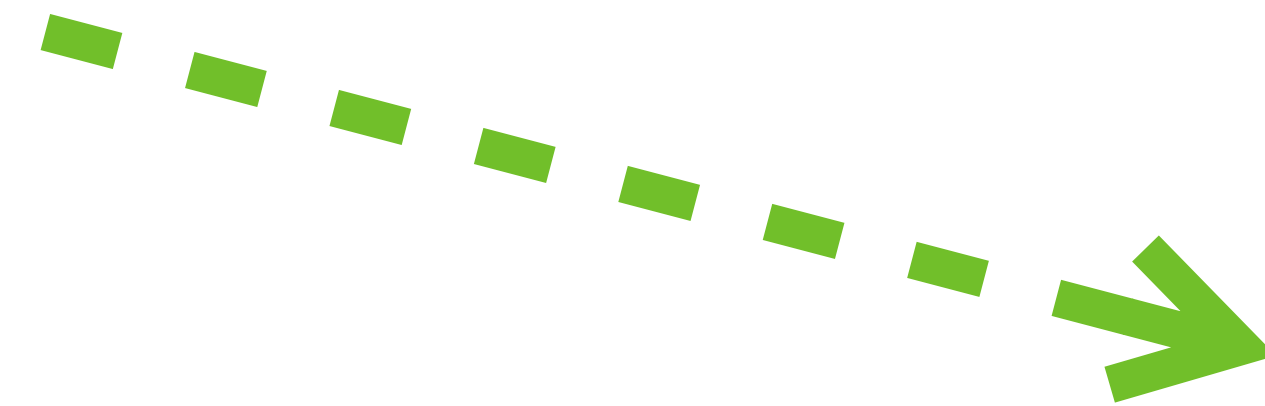
LIMITED QUANTITY



ATL

BTL

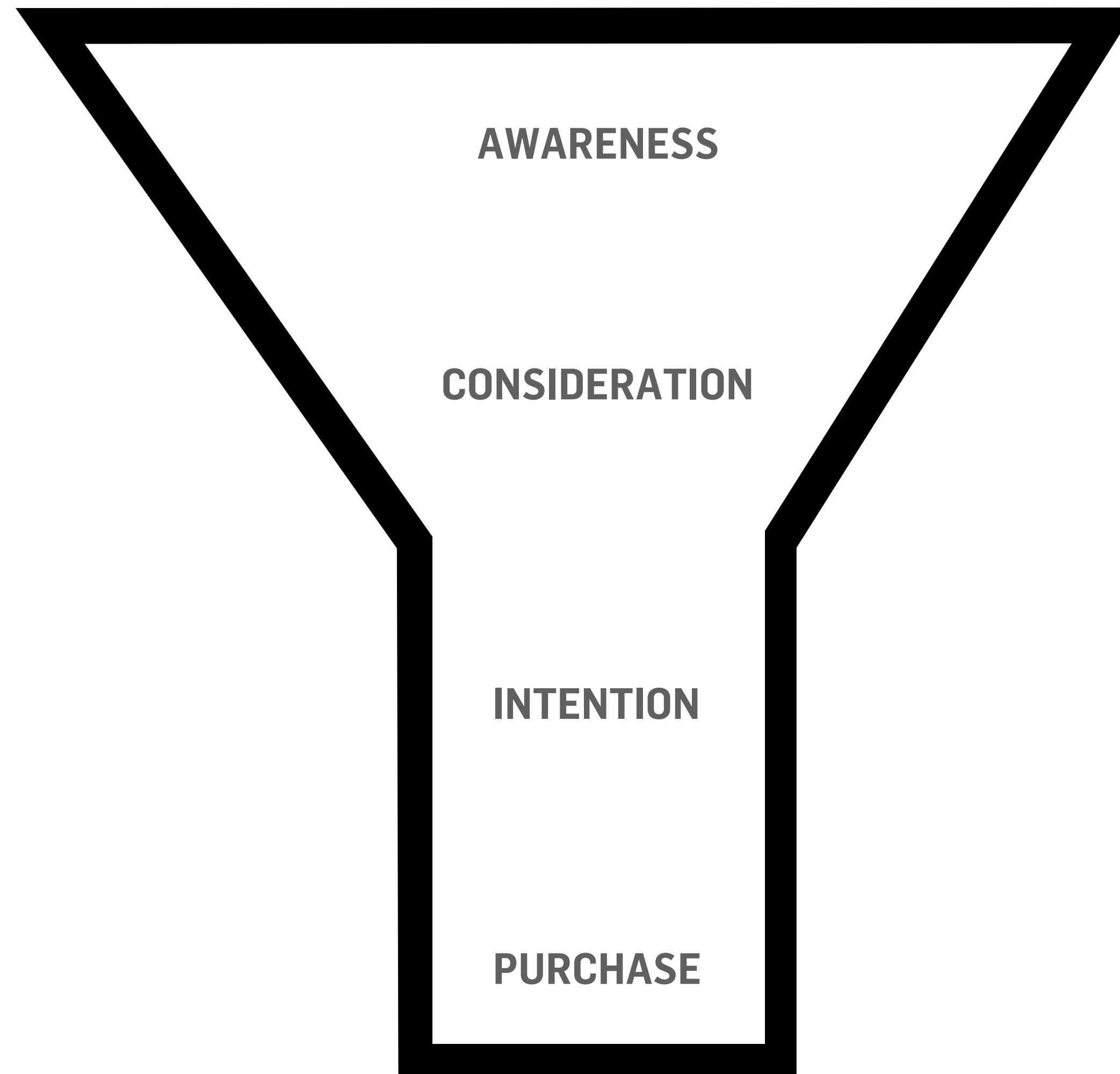
**Most normal
Web users**



ATL

BTL

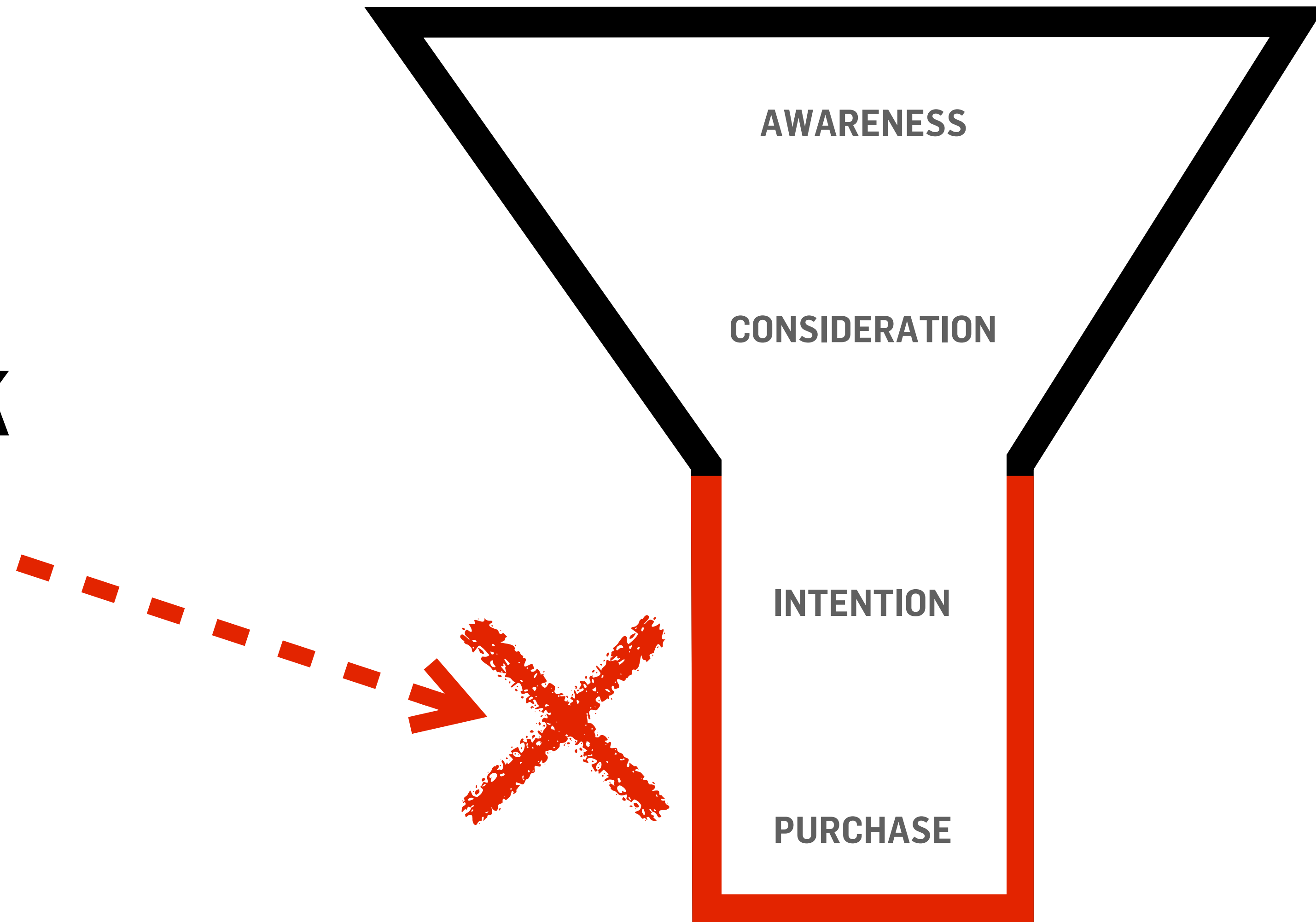
**Adblock
users**



ATL

BTL

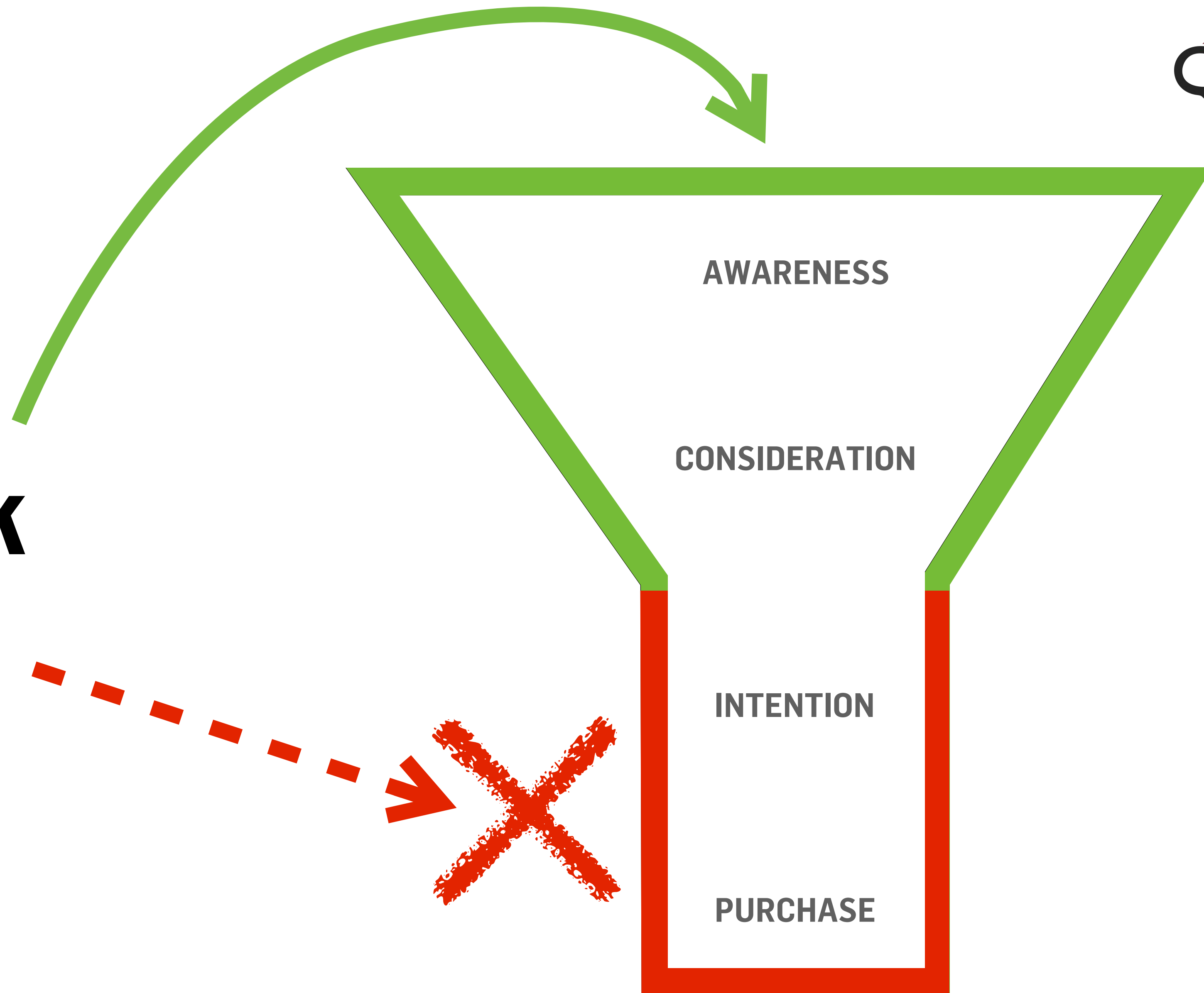
**Adblock
users**



ATL

BTL

**Adblock
users**



ATL

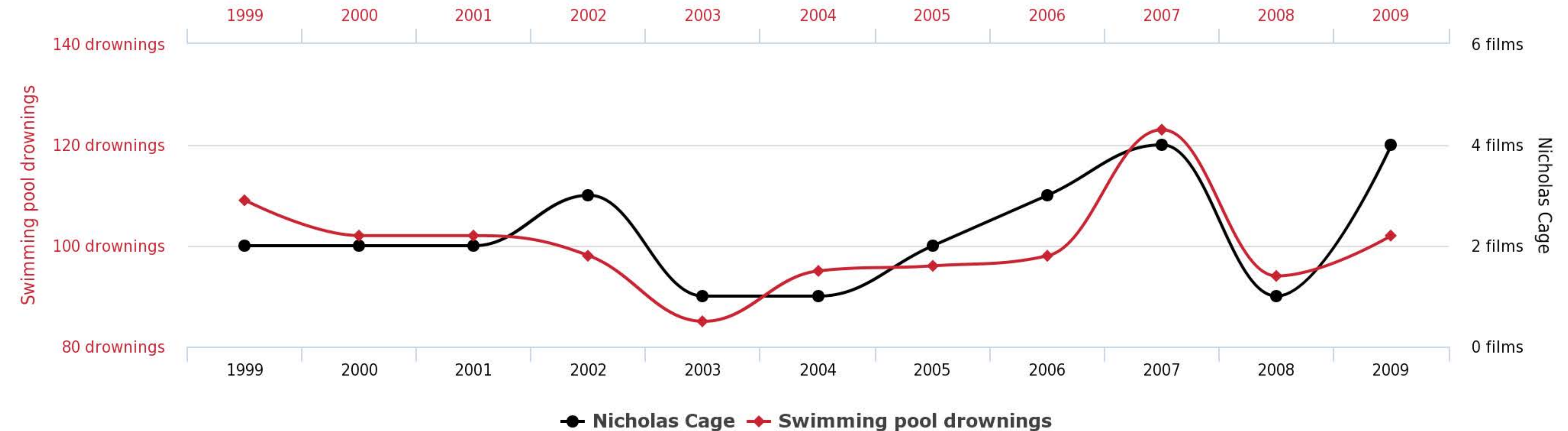
BTL



**SHOW CONTEXTUALLY
SELECTED PREMIUM ADS.**

**DATA, DONE
WRONG, IS A TRAP**

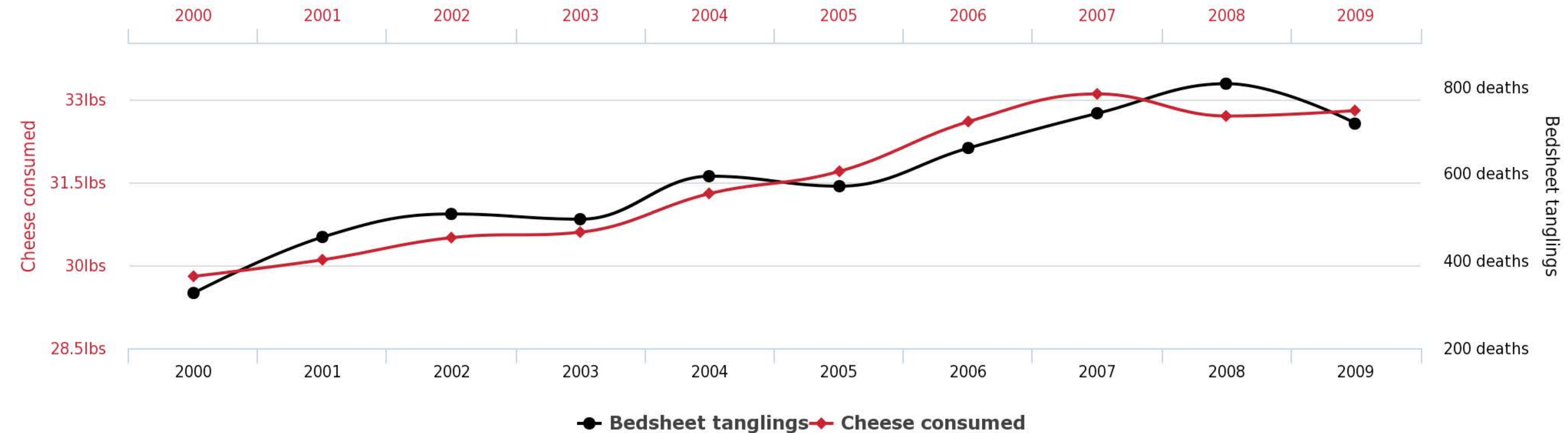
Number of people who drowned by falling into a pool correlates with Films Nicolas Cage appeared in



Per capita cheese consumption

correlates with

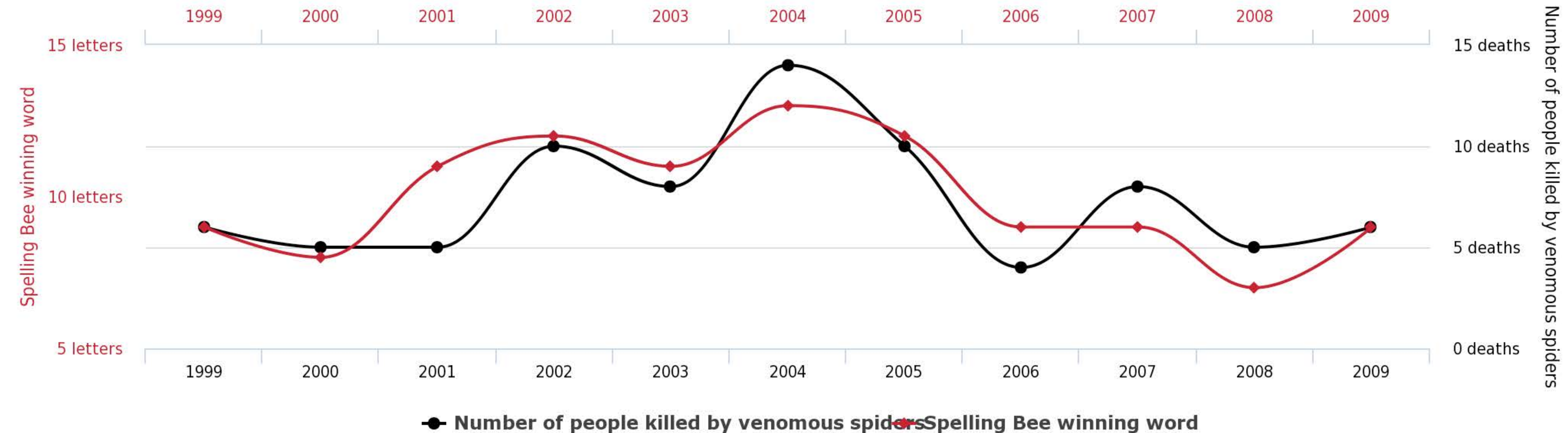
Number of people who died by becoming tangled in their bedsheets



Letters in Winning Word of Scripps National Spelling Bee

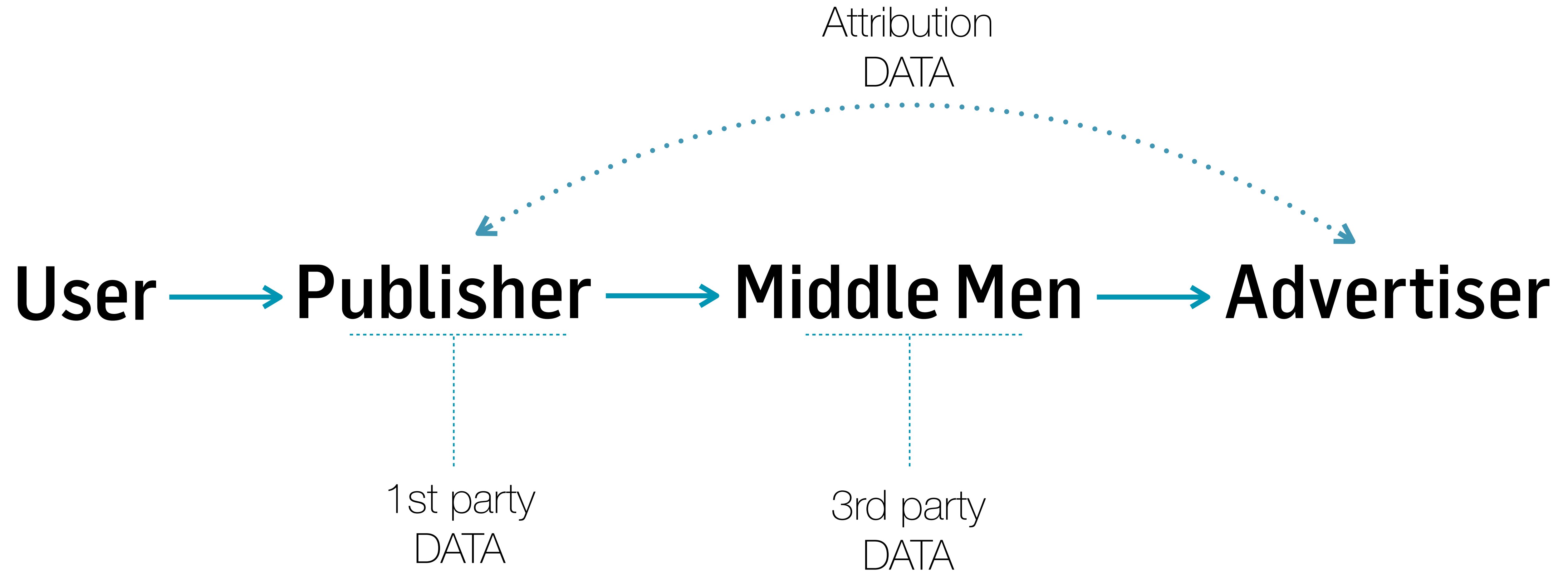
correlates with

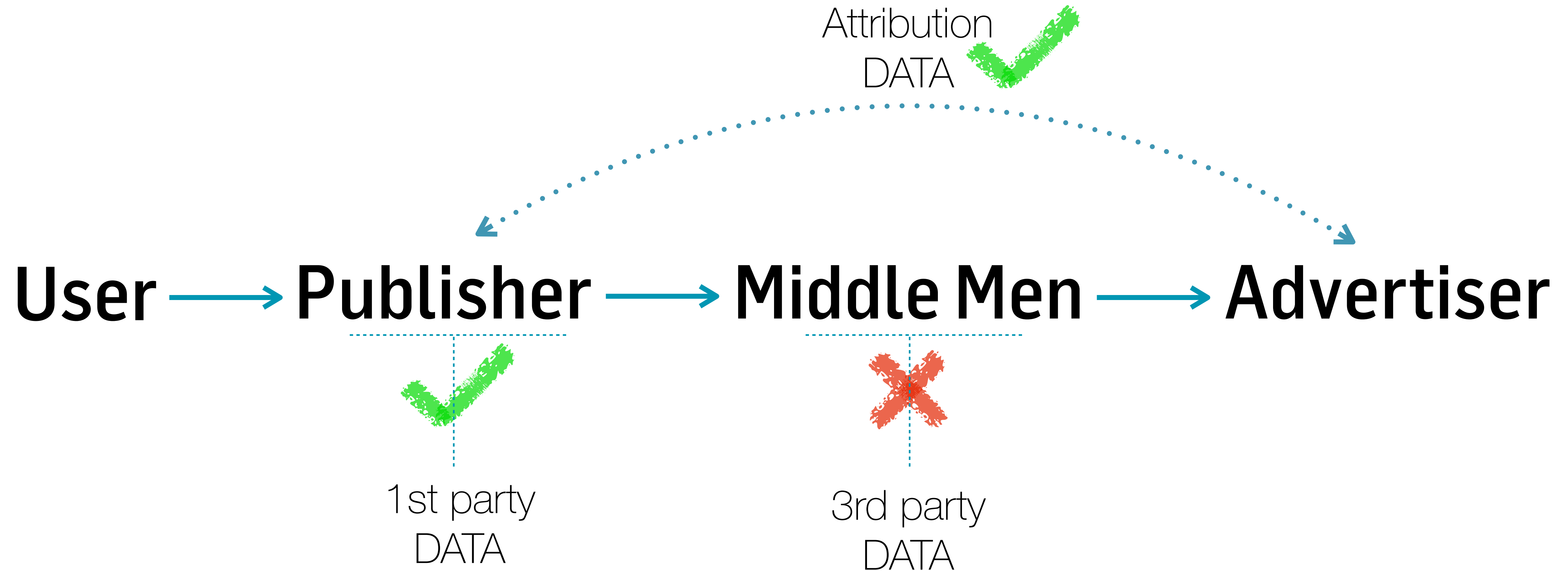
Number of people killed by venomous spiders



NETFLIX

facebook







**IT'S TIME FOR
INK AND TV WISDOM
TO SAVE DIGITAL**

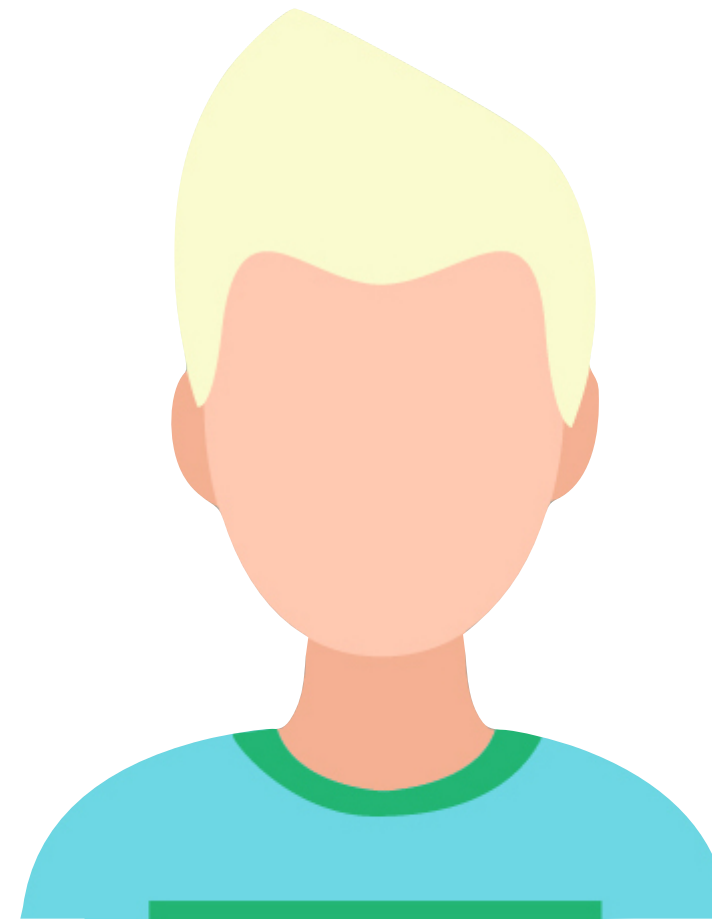


**IT'S TIME FOR
INK AND TV WISDOM
TO SAVE DIGITAL**

BAD IDEA #1

ADBLOCK WALLS

site



ADBLOCK WALLS



ADBLOCK WALLS



BAD IDEA #2

REPEAT MISTAKE

“REINSERTING” BAD ADS



DO NOT SERVE MEAT TO VEGETARIANS



Do not 'reinsert' bad ads.

Do serve formats on
the blocked web that **solve
consumers' privacy, UX,
and security issues.**



Reinvention,
not reinsertion

Summary

Summary

1. Publishers - not advertisers - feel the most pain.

Summary

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2. But consumer pain is real too.

Summary

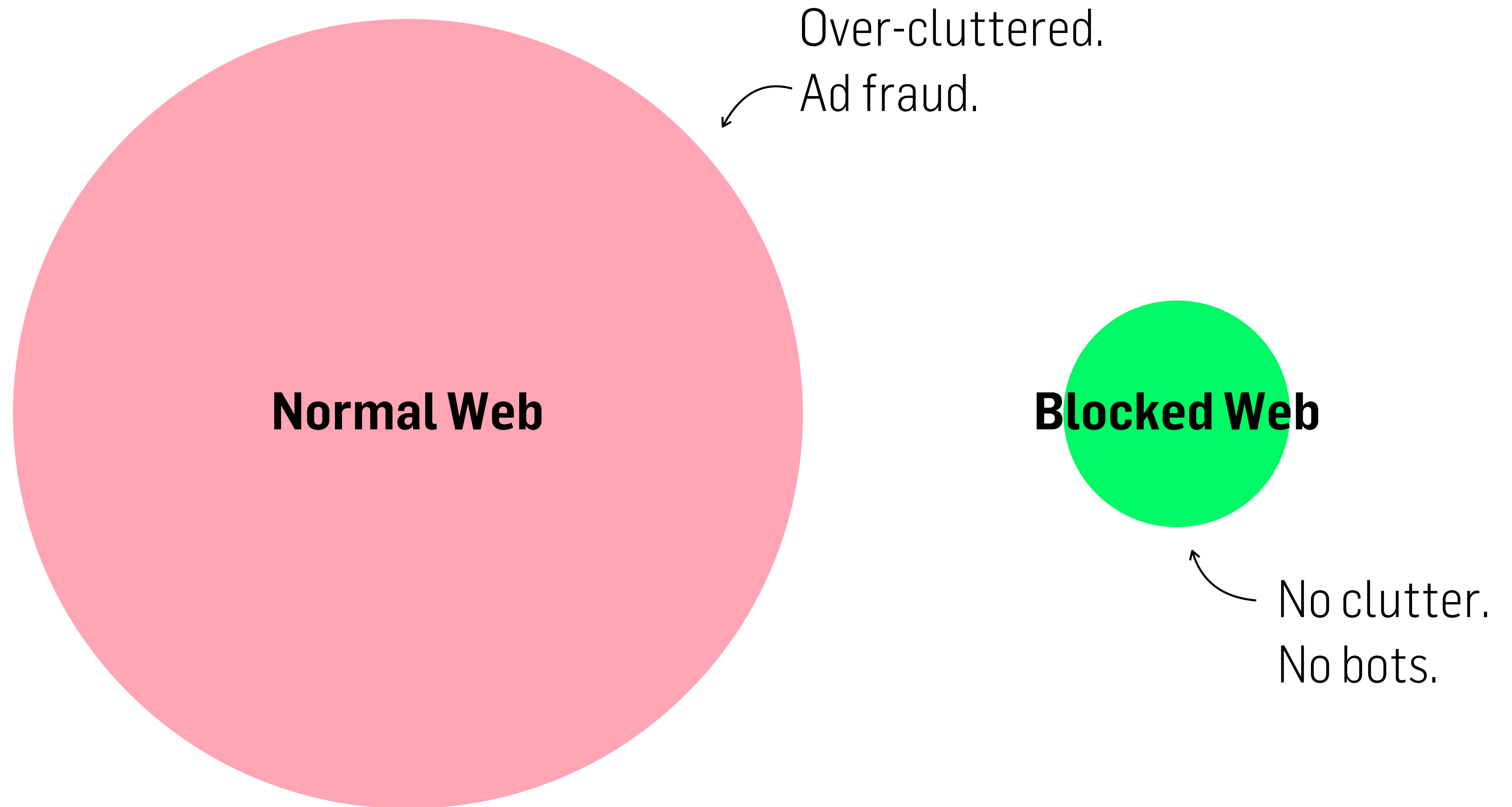
1. Publishers - not advertisers - feel the most pain.
2. But consumer pain is real too.
3. Ads can be shown on the Blocked Web.

Summary

1. Publishers - not advertisers - feel the most pain.
2. But consumer pain is real too.
3. Ads can be shown on the Blocked Web.
4. Reinsertion without fixing consumer issue is a bad idea. So are adblock walls.

Summary

1. Publishers - not advertisers - feel the most pain.
2. But consumer pain is real too.
3. Ads can be shown on the Blocked Web.
4. Reinsertion without fixing consumer issue is a bad idea. So are adblock walls.
5. Blocked Web is a new premium space.



The 'blocked web' is steadily growing, creating a new, premium space

johnny@pagefair.com