How To Advertise To Consumers Who Hate Ads

Create Customer-Obsessed Advertising By Making Ads That Are Human, Helpful, And Handy

by Jim Nail and Drew Green
July 21, 2017

Why Read This Report

With advertisers struggling against ad blocking, cord cutting, and fragmented audiences, the ad industry seems doomed. But while these trends are factual and challenging, they are not necessarily damning. Advertisers can rebound from this nadir if they adapt to consumers' new expectations. B2C marketers, read this report to understand consumers' changing relationship with advertising and how you must evolve advertising strategies to align with consumer needs.

Key Takeaways

Most Consumers Avoid Most Ads
Ad blocking places consumers' dissatisfaction with digital advertising in the spotlight. But the truth is, consumers have adopted an arsenal of avoidance behaviors for all types of advertising.

Progressive Pioneers' Ad Receptivity Offers Hope
The most technically adept consumer segment shows the greatest receptivity to advertising. But they also set new terms for what they will accept.

Adapt An Ad Strategy That Reflects Consumer Behaviors And Needs
Abandon a one-size-fits-all execution strategy. Invest in creative appropriate to the unique contexts of consumers' needs across today's diverse device and media environment.

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by Jim Nail and Drew Green
with Brigitte Majewski, Stephanie Liu, and Christine Turley
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Consumers Love To Hate Advertising

The symbiotic relationship between consumers, content, and advertising is eroding. Advertisers and media firms like to blame ad blockers for this dissolution. But ad blockers are merely a symptom. The real culprit? Marketers' overexploitation of consumer digital media and device adoption to insert oft-irrelevant advertising into all corners of consumers' digital lives.[1] Using Forrester Data's Consumer Technographics® data, we examined consumers' attitudes and behaviors related to advertising avoidance. We discovered consumers are reducing ad reach and effectiveness as they:

› **Approach media with weary wariness.** Consumers assume from the start that their digital experiences will be cluttered with ads, diminishing their ad receptivity. Advertisers have barraged consumers with digital ads for years, interrupting their web and mobile experiences, delaying content consumption with 30-second pre-roll ads, and hijacking their social feeds with branded and sponsored posts. Thirty-eight percent of US online adults fear they will see too many ads on internet connected devices.[2]

› **Tune out all ad types regardless of channel.** Brands may think they can work around the ad blocking trend simply by choosing channels harder to block. But consumers' ad apathy is channel agnostic. When we asked US online adults about their relationship with eight of the most common types of ad channels, the percentage avoiding ads outweighs those engaging with ads — actively reading, watching, or listening — in all media.[3] Old stalwarts of TV, in-store, and print fare best, but still have fewer than one-quarter of US online adults saying they actively engage. Digital and mobile fare worst, with only around 10% engaging with the ads and over 40% avoiding them.[4]

› **Deploy ad blockers regardless of advertising affinity.** In theory, ad blocker adoption should be lower among consumers who say they actively engage with ads. But our research shows that those who are most open to engaging with ads are just as likely to block ads as those who actively avoid ads — draining even the most receptive audiences from marketers' reach. When we asked consumers about ad blocker usage, nearly identical proportions of both ad avoiders and ad engagers said they use ad blockers — 35% and 36% respectively.[5]

› **Seek alternative information sources.** As consumers have embraced digital channels, they have discovered new ways to research their purchases, lessening their dependence on ads for information. Now, consumers prioritize content from friends and family, review sites, and company websites over advertising when researching products and services.[6] Only 21% of US online adults agree that ads are a good way to learn about a new product.[7]

One Consumer Segment's Affinity For Advertising Bucks The Trend

Forrester's Empowered Customer segmentation measures consumer evolution along five dimensions: willingness to experiment, device usage, digital/physical integration, information savviness, and self-efficacy (see Figure 1).[8] Our analysis of this segmentation reveals that the most digitally savvy segment,

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Progressive Pioneers, demonstrates the greatest affinity for advertising; members engage with ads more than they avoid them. Compared with other segments' attitudes, Progressive Pioneers are anomalous — and attractive to advertisers — because they:

› **Accept advertising as part of the digital content bargain.** Progressive Pioneers are the most willing to accept advertising exposure in exchange for free content. Fifty-four percent of Progressive Pioneers would rather see ads on websites than pay for the content. Only 26% to 35% of other consumer segments agree with this preference.[9]

› **Find educational value in ads.** Progressive Pioneers think of ads as more than unwelcome interruptions. More than any other segment, they view ads as a useful information source. Just under 60% of Progressive Pioneers agree that ads are a good way to learn about new products, while no other segment cracks 20% agreement.[10]

› **Engage with ads across channels.** On average, Progressive Pioneers tend to have more engagers than avoiders of advertising. Progressive Pioneers' net engagement rate — the percent of respondents engaging with an ad format less the percent avoiding it — is dramatically higher compared with any other segment. Progressive Pioneers show the highest positive net ad engagement for eight common ad types, online and off (see Figure 2).

› **Act after ad viewing.** Following ad exposure, Progressive Pioneers are more likely than other segments to take positive actions, such as going to a store or using a search engine to learn more about the product. In fact, even the Progressive Pioneers who say they avoid advertising react with higher rates of action following ad exposure than the subset of Convenience Conformers who engage with ads.[11]

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FIGURE 1 Forrester's Empowered Customer Segmentation

Progressive Pioneers
With an opportunity-seeking mindset and behavioral drive, digital readiness, and spending power, this group is at the forefront when demanding product innovations.

Savvy Seekers
Consumers in this segment are among the first to learn about innovations and exhibit high rates of new product engagement.

Convenience Conformers
This group tends to opt for products and services that enhance convenience once they become widely available.

Settled Survivors
While they will slowly evolve, these customers' behaviors will reflect adaptation, rather than trend-setting.

Reserved Resisters
These customers are least enthusiastic about product or experience innovation.

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FIGURE 2 Progressive Pioneers Are More Receptive To Advertising Across All Media

"When you see or hear each of the following types of advertising, do you actively try to avoid it, or do you read/watch it?"
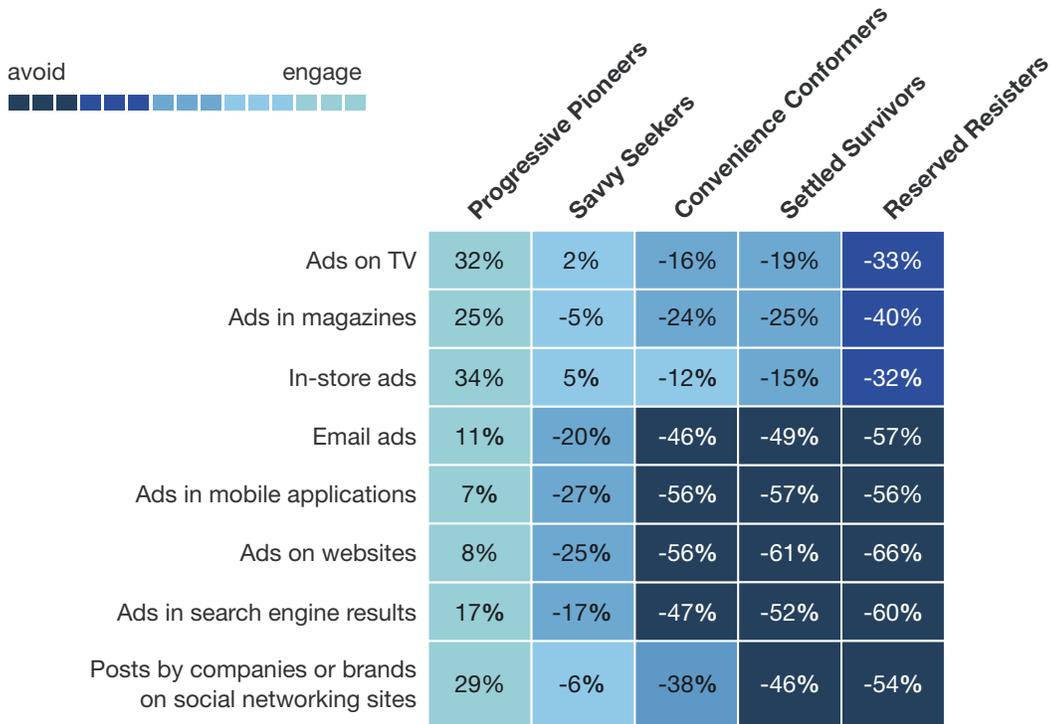
avoid   engage

	Progressive Pioneers	Savvy Seekers	Convenience Conformers	Settled Survivors	Reserved Resisters
Ads on TV	32%	2%	-16%	-19%	-33%
Ads in magazines	25%	-5%	-24%	-25%	-40%
In-store ads	34%	5%	-12%	-15%	-32%
Email ads	11%	-20%	-46%	-49%	-57%
Ads in mobile applications	7%	-27%	-56%	-57%	-56%
Ads on websites	8%	-25%	-56%	-61%	-66%
Ads in search engine results	17%	-17%	-47%	-52%	-60%
Posts by companies or brands on social networking sites	29%	-6%	-38%	-46%	-54%

Base: 7,212 to 18,793 US online adults (18+)
Source: Forrester Data Consumer Technographics® North American Online Benchmark Survey (Part 1),
2017
Percentages represent the degree to which each segment skews toward avoiding or engaging with the ad
type, calculated by subtracting the percentage of respondents who avoid the ad from the percentage who
engage with it.

Embrace Progressive Pioneers' Preferences To Redeem Advertising

Progressive Pioneers' receptivity to advertising, combined with their profile as younger individuals with greater annual income, makes them an attractive segment for marketers (see Figure 3). However, their significant ad blocker usage and adoption of ad-free streaming services conflict with their receptivity to advertising, signaling advertising's misalignment to their needs. Our conversations with industry experts such as Josh Chasin, chief research officer at comScore, confirm that an oversaturated ad environment is prodding the most attractive consumers to deploy their income and technological savviness to seek freedom from what they view as irrelevant or intrusive advertising.

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To appeal to Progressive Pioneers' elevated expectations, marketers must move beyond current advertising models that prioritize product-focused messages blasted out to maximize reach and frequency. Instead, marketers must embrace the principles of post-digital marketing to reinvigorate advertising's appeal to this segment: Be human with empathy, be helpful with personalized experiences, and be handy through adaptability.[12]

FIGURE 3 Progressive Pioneers Skew Younger, More Affluent, And More Educated
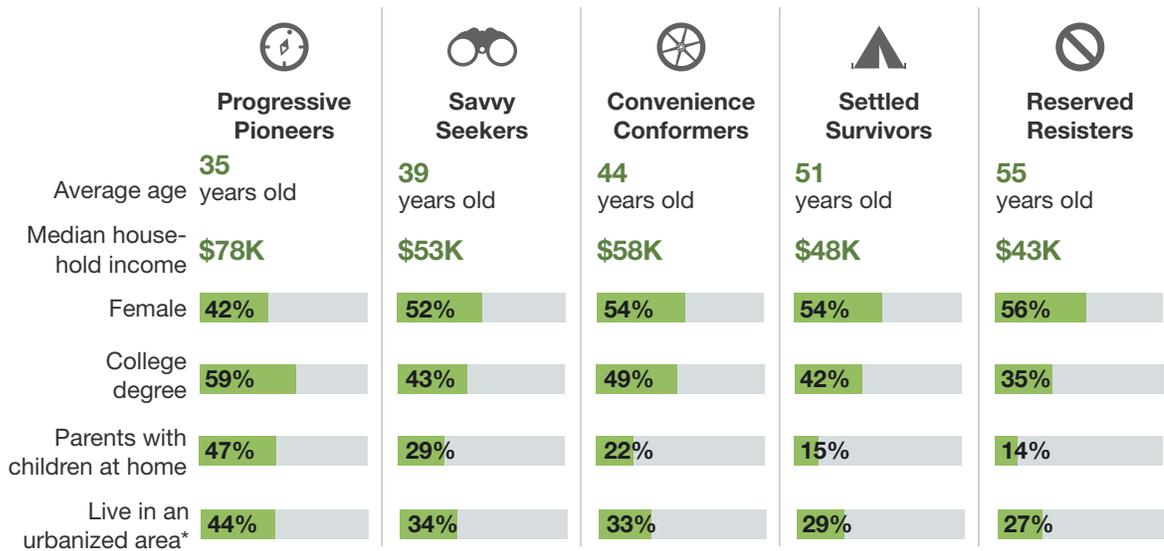
	Progressive Pioneers	Savvy Seekers	Convenience Conformers	Settled Survivors	Reserved Resisters
Average age	35 years old	39 years old	44 years old	51 years old	55 years old
Median house-hold income	$78K	$53K	$58K	$48K	$43K
Female	42%	52%	54%	54%	56%
College degree	59%	43%	49%	42%	35%
Parents with children at home	47%	29%	22%	15%	14%
Live in an urbanized area*	44%	34%	33%	29%	27%

Base: 7,212 to 18,793 US online adults (18+)
Source: Forrester Data Consumer Technographics® North American Online Benchmark Survey (Part 1), 2017
*Urbanized area as defined by the US Census, 2010.

Be Human With Empathy

The traditional role of advertising as a top-down communications tactic prioritizes marketing objectives like driving awareness over solving customer needs. This leads to treating customers as targets, not as people, while marketers chase volume metrics like gross rating points, oblivious to customers' goals. Astute marketers approach advertising from a place of empathy by considering customers' contextual needs throughout their journey and designing advertising to suit those ends. Marketers who put the consumer first practice an empathetic approach to advertising by:

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› **Addressing consumers' values.** Consumers are increasingly seeking alignment between their own values and the values of the brands they select.[13] Brands can utilize advertising as a platform to reinforce and foster value-based connections by signaling their values through messaging. For example, Airbnb's 2017 Super Bowl ad conveyed the hospitality brand's message of acceptance to emphasize the company's mission of fighting discrimination among its users.[14]

› **Targeting contextual needs.** Customers inevitably encounter pain points throughout their journeys with brands. Analyzing these journeys affords marketers insight into instances where communications can assuage stressors, help facilitate next actions, or reemphasize the customer's value.[15] Lowe's Home Improvement is piloting a program that links customers' Pinterest accounts with its in-store app to offer style suggestions, matching Lowe's inventory with an individual's curated ideals.

› **Designing for emotion.** Marketers who use dry demographic statistics to define their customers and then focus on the functional pathway to purchase leave no room for emotion's powerful role.[16] In the post-digital world, marketers must both understand the emotional need that triggers a purchase and build an experience that aligns with consumers' emotions during the journey.[17] LifeLock primes consumers to associate its products with a sense of relief by juxtaposing the anxiety-inducing threat of identity theft against the brand's promise to protect the consumer.

Be Helpful With Personalized Experiences

Consumers are ready for deeper brand relationships and actively seek out brands aligned with their preferences.[18] Progressive Pioneers will meet brands halfway as part of this courtship by sharing personal data, provided they receive experiences tailored to their preferences.[19] To create personalization that Progressive Pioneers value, marketers must:

› **Actualize identity resolution.** Delivering consistent personalization only begins when marketers have established a foundation to accurately identify a customer across channels. Identity resolution functions like a consumer version of connect the dots, piecing together individual touchpoints and filling in the resulting image with behavioral and contextual data to create a unique profile of a customer.[20] Facebook's cross-device identity tracking informs the orchestration and execution of personalized communications across other sites in its Audience Network. Marketers can also tap onboarding firms such as Acxiom LiveRamp that identify the phone, tablet, and computers used by the same individual and append profile data in a privacy-compliant manner.

› **Make their content intelligent.** Marketers increasingly invest in content creation, potentially providing a range of assets to serve personalization demands. Yet current means of storage and delivery lack the tools to support personalization. Content intelligence solutions optimize content relevancy by applying artificial intelligence to iteratively learn what content best serves which contexts.[21] One major broadcaster applied content intelligence technology to hone the relevance of its direct marketing teams' offers, resulting in a 22.3% average lift in open rates.[22]

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› **Offer contextual privacy.** Progressive Pioneers are keenly sensitive to the use of their data and
will swiftly rebuke a brand if they sense data impropriety.[23] Providing data transparency in the form
of contextual privacy — a business practice in which the collection and use of personal data is
consensual within a mutually agreed upon context, for a mutually agreed upon purpose — can
assuage concerns. Ceding control to consumers sounds akin to raising the risk of not acquiring
the needed data, but the practice drives deeper engagement and trust between the brand and
consumer.[24] The practice is taking hold outside of advertising with examples such as Disney's
MagicBand wristband, which offers an opt-in experience with explicit notice of the ways data is
collected and used.

Be Handy Through Adaptability

Progressive Pioneers take meandering purchase and usage journeys, encountering brands along
idiosyncratic paths across multiple devices.[25] Their fluidity requires that marketers embrace an adaptable
approach to advertising where operations and campaigns focus on the customer's journey. This
approach means retiring fixed marketing plans in favor of anticipating multiple possible journeys and
delivering appropriate information at each step. To support adaptability in practice, marketers should:

› **Design around the customer life cycle, not a fixed message.** A customer life-cycle approach
abandons the traditional funnel in favor of a customer-centric perspective emphasizing the six
relationship phases with a brand.[26] Backed by a customer life-cycle strategy, marketers deploy a
portfolio of marketing assets to reflect the diversity of consumer interactions with brands. Birchbox, a
beauty retailer, developed an engagement strategy specifically targeting a segment without the time
to comparison-shop. A mix of tutorials, tips, and contextual content provide exposure and simplify
decision making across the life cycle, ensuring Birchbox remains a relevant destination for purchases.

› **Institute omnichannel budgeting.** Many marketers take the initial step of operating collaborative
teams to improve campaign quality and cohesion, but improved team dynamics alone are
insufficient to respond to consumer behavior changes. Marketers require fluid budgets to deftly
adjust spend across channels to improve efficiency and relevance.[27] Omnichannel budgeting
emphasizes getting the best result from each dollar rather than focusing on where each dollar was
spent. For example, marketing measurement models commonly show that display ads correlate
to higher search volume, as evidenced by the 20% of US online adults who say they've used a
search engine to research the advertised product/service in the past month in response to an ad.[28]
Budgets need the flexibility to move dollars between these channels to optimize the overall volume
of search queries.

› **Prepare for a future with fewer interruptible moments.** Technologies antithetical to interruptions —
such as intelligent agents — will upend the advertising ecosystem.[29] In such an environment, marketers
will need to design messages imbued with the tone you'd find in a friend's advice mediated through
an intelligent agent.[30] Shoe-horning traditional breakthrough advertising into these new formats will
inevitably falter, as demonstrated by the hullabaloo over Google incorporating an unprompted message
about Disney's Beauty and the Beast into its daily updates.[31]

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Tailor Ad Creative To Consumer Behavior By Device And Medium

Marketers must respond to the broader trend of ad avoidance by abandoning a one-size-fits-all approach to the ads they create for each medium. To date, marketers have downplayed the different environments created by different digital devices and media options, as evidenced by the 29% of mobile executives who admit their mobile experiences are merely scaled-down version of their PC services.[32] Advertisers must take a more nuanced approach, understand what each device and medium can accomplish for their brand, and create an overall strategy that blends these different capabilities to build reach and create salience. Specifically, B2C marketers should adjust their media strategies by:

› **Clarifying the role each medium plays.** Marketers assume that all devices and media types are interchangeable conduits for ads. Instead, marketers must optimize each channel and device based on consumers' varying uses and ad tolerances and then orchestrate those tactics to accommodate consumers' connected journeys. Marketers should plan a media mix that aligns with consumers' behavioral habits in different media environments. For example, use media with high ad tolerance and engagement like TV and print to tell in-depth brand stories while serving consumers with key images in low engagement environments like mobile and digital to trigger brand story recall at critical junctures of the customer journey.

› **Matching the creative execution to the medium.** Today's common practice of using a single execution in all media reduces the production budget but disregards consumers' channel-specific behavior. The result? A mismatch between the way consumers use a medium and the ad's structure that fails to deliver the brand message effectively. For example, a video campaign must include adaptations where the brand is visible in the first five seconds to accommodate skipping behaviors and subtitles to ensure the message is communicated even if the sound is off.[33]

› **Enforcing frequency caps.** Buying that focuses on impressions disregards whether an individual is exposed to an ad once or 100 times and results in annoyance and waste. Frequency curves demonstrate that after four or five exposures to a message, effectiveness plateaus. Higher levels of frequency are a waste, or worse, damage the brand. Matt Krepsik, global head of marketing ROI products at Nielsen, told us, "Two marketing strategies result in negative brand equity: overreliance on discounting and oversaturation of media." Cookies and today's cross-device IDs are imperfect frequency management tools but are still useful in reducing the repetitive exposures that annoy consumers.

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Supplemental Material

Survey Methodologies

The Forrester Data Consumer Technographics North American Online Benchmark Survey (Part 1), 2017, was fielded in February and March 2017. This online survey included 58,000 respondents in the US and 6,011 respondents in Canada between the ages of 18 and 88. For results based on a randomly chosen sample of this size, there is 95% confidence that the results have a statistical precision of plus or minus 0.4% of what they would be if the entire population of US online adults (defined as those online weekly or more often) had been surveyed and plus or minus 1.3% of what they would be if the entire population of Canadian online adults had been surveyed. Forrester weighted the data by age, gender, income, region, and broadband adoption to demographically represent the US and Canadian online adult populations. The survey sample size, when weighted, was 58,000 in the US and 6,011 in Canada. Ipsos Observer fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates.

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The Forrester Data Consumer Technographics North American Consumer Technology, Media, And
Telecom Online Benchmark Recontact Survey 1, Q3 2016 (US) was fielded in May 2016. This online
survey included 4,500 respondents in the US between the ages of 18 and 88. For results based on a
randomly chosen sample of this size, there is 95% confidence that the results have a statistical precision
of plus or minus 1.5% of what they would be if the entire population of these markets' online adults
(defined as those online weekly or more often) had been surveyed. The data was weighted by age,
gender, income, broadband adoption, and region to demographically represent the online adult population
within the US. The survey sample size, when weighted, was 4,500. Lightspeed GMI fielded this survey on
behalf of Forrester. Survey respondent incentives included points redeemable for gift certificates.

Note: Weighted sample sizes can be different from the actual number of respondents to account for
individuals generally underrepresented in online panels.

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Forrester Data Consumer Technographics North American Online Benchmark Survey (Part 1), 2017
of 58,000 US online adults and 6,011 Canadian online adults includes many additional questions and
parameters by which you can analyze the data contained in this report.

We can provide additional insights about the consumers highlighted in this report:

› Who they are (e.g., demographics, lifestyle, and interests).

› What they do (e.g., digital, mobile, social behaviors).

› Affiliations they have (e.g., brands used, products owned).

› How they feel (e.g., attitudes, interests).

If you wish to subscribe to Forrester's Consumer Technographics services, please contact your
account manager or data@forrester.com. If you are an existing Technographics client, please contact
your data advisor at data@forrester.com.

Endnotes

[1] See the Forrester report "Ad Blockers Rock The Media Ecosystem."

[2] Source: Forrester Data Consumer Technographics North American Consumer Technology, Media, And Telecom Online
Benchmark Recontact Survey 1, Q3 2016 (US).

[3] Source: Forrester Data Consumer Technographics North American Online Benchmark Survey (Part 1), 2017.

[4] Source: Forrester Data Consumer Technographics North American Online Benchmark Survey (Part 1), 2017.

[5] Source: Forrester Data Consumer Technographics North American Online Benchmark Survey (Part 2), 2016.

[6] Thirty percent of US online adults say they rely a lot on recommendations from friends or family when making
purchases. When researching products and services, 44% of US online adults read product reviews, 28% read
company blogs, and 28% read company message boards for information weekly or more. Source: Forrester Data
Consumer Technographics North American Online Benchmark Survey (Part 1), 2017.

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[7] Source: Forrester Data Consumer Technographics North American Online Benchmark Survey (Part 2), 2016.

[8] See the Forrester report "The Rise Of The Empowered Customer."

[9] Source: Forrester Data Consumer Technographics North American Consumer Technology, Media, And Telecom Online Benchmark Recontact Survey 1, Q3 2016 (US).

[10] Source: Forrester Data Consumer Technographics North American Online Benchmark Survey (Part 2), 2016.

[11] Source: Forrester Data Consumer Technographics North American Consumer Technology, Media, And Telecom Online Benchmark Recontact Survey 1, Q3 2016 (US).

[12] We've entered a new world order where entitled customers integrate digital fluidly into physical experiences and marketing practices haven't kept up. The fix is a new marketing worldview — not more technology nor a host of new processes. See the Forrester report "Thriving In A Post-Digital World."

[13] See the Forrester report "Align With Consumers' Values To Win Their Hearts And Wallets."

[14] Source: Sam Byford, "Airbnb's Super Bowl ad says 'we accept' everyone," The Verge, February 5, 2017 (https://www.theverge.com/2017/2/5/14517708/airbnb-super-bowl-ad-donation-aid).

[15] See the Forrester report "Pivot To Person-First Personalization."

[16] Companies that struggle to resonate with customer emotions often lack an understanding of how those emotions work; they're trapped in the belief that technology is functional, not emotional. See the Forrester report "Four Myths About Consumer Emotion That Are Leading You Astray."

[17] Designing delightful moments may charm customers some of the time, but it misses the full scope of the role of emotions in building enduring relationships with customers. See the Forrester report "Designing For Emotion."

[18] While consumers reject advertising, they also tell us through their actions that they want to find meaningful engagement and develop relationships with the brands they trust and revere. See the Forrester report "The End Of Advertising As We Know It."

As company values become more apparent to consumers, these principles increasingly affect customer advocacy, purchase inclination, willingness to spend, and loyalty. See the Forrester report "The Values-Based Consumer" and see the Forrester report "Align With Consumers' Values To Win Their Hearts And Wallets."

[19] Forty-five percent of Progressive Pioneers agree it's okay for companies to track their activities across multiple devices to send them more relevant ads. Source: Forrester Data Consumer Technographics North American Consumer Technology, Media, And Telecom Online Benchmark Recontact Survey 1, Q3 2016 (US).

[20] For an overview of how to realize identity resolution, the processes involved, and its implications to marketing as a whole, see the Forrester report "The Strategic Role Of Identity Resolution."

[21] For an overview of the emerging field of content intelligence, see the Forrester report "Content Intelligence: Algorithms Assign Meaning And Value To Content" and see the Forrester report "Breakout Vendors: Content Intelligence For Marketing."

[22] See the Forrester report "Content Intelligence: Algorithms Assign Meaning And Value To Content."

[23] See the Forrester report "Empowered Customers Demand Contextual Privacy."

[24] See the Forrester report "The New Privacy: It's All About Context."

[25] The explosion of personal technologies and social network connections has ruptured the once-linear consumer purchase path and disrupted what it means to have a seamless brand experience. See the Forrester report "The Customer Life Cycle: A Blueprint For Customer-Obsessed Enterprises."

[26] See the Forrester report "The Customer Life Cycle: A Blueprint For Customer-Obsessed Enterprises."

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27 See the Forrester report "The Future Of Omnichannel Media Buying Is Programmatic" and see the Forrester report "Best Practices For Omnichannel Digital Media Buying."

28 Source: Forrester Data Consumer Technographics North American Consumer Technology, Media, And Telecom Online Benchmark Recontact Survey 1, Q3 2016 (US).

29 Early-stage intelligent agents (Is) have arrived and are gaining traction among consumers. As consumers fall in love with the customized, proactive utilities Is provide, Is will capture the interactions that customers used to have directly with brands. See the Forrester report "The Rise Of Intelligent Agents."

30 Source: "Futurology: from mobile silos to open ecosystems," Forrester Research, May 4, 2017 (https://go.forrester.com/ep11-futurology-mobile-silos-open-ecosystems/).

31 Source: James McQuivey, "Google Home Gives In To Ad Interruptions," James McQuivey's Blog, March 16, 2017 (http://blogs.forrester.com/james_mcquivey/17-03-16-google_home_gives_in_to_ad_interruptions).

32 Source: Forrester's H2 2016 Global Mobile Executive Online Survey.

33 See the Forrester report "Don't Rerun Your TV Commercials For Mobile Video Ads."

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