

Online ad format acceptance: towards a « new deal »

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Last year the number one media agency in Belgium, Space, published a survey exploring consumers' acceptance of online advertising formats. The survey found that, unsurprisingly, people reject online messages which interrupt their online experience, for example video advertisements. Rejection is even stronger on mobile devices, where adverts not only interrupt normal usage but also result in slower surfing and increased data usage; all at the expense of the user. Demographics make little difference, however a key differentiator is attitudinal: individuals comfortable with the 'data issue' i.e. brands owning personal data, or individuals who agree with the principle of advertising in exchange for content, are more likely to accept (non-intrusive) advertising formats. These findings make it clear that advertisers and publishers should work together to provide a "new deal" for consumers: advertising should be less intrusive, more carefully targeted, at a more moderate frequency, and should, in parallel, form part of the implicit contract whereby advertising and data 'pay' for content.

Surveying people's perceptions

Space regularly conducts 'Space2Face' surveys which focus on public perceptions of the big topics within the digital world. At the end of 2015, Space2Face gained attention from the mainstream press after producing the first ever publication on adblocking in Belgium; today this continues to be an important reference paper in Belgium. A subsequent Space2Face survey was launched in Spring 2016, and brings new insight to the hot issues in marketing and media market.

The survey basics

The second Space2Face survey was conducted online between Apr 22 and May 31, 2016. Drawing from the Permessio database (an opt-in database, primarily used for direct marketing) from the company Bisnode., the survey focussed on people aged 18 and over, and the average completion time was less than 9 minutes. The survey collected 1181 complete responses, and data was weighted by language, gender, age and social status (source: CIM Target Group Monitor 2015) in order to be representative of the Belgian online population.

It is worth noting that the origin of the panel might matter: people registered in a direct marketing database may have different attitudes towards privacy and commercial communication (arguably, a slightly more positive attitude) than the average population.

The questionnaire itself comprised of three topics:

1. Claimed attention to TV programmes and dayparts
2. Different aspects of privacy and online experience, including the perception of the 'information bubble' on Facebook, and of brands collecting and using consumers' digital footprint
3. Online advertising formats

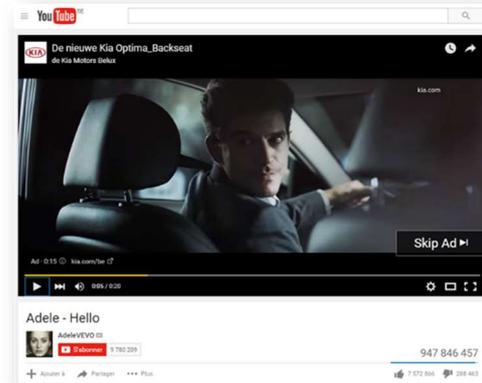
The 'online advertising formats' element of the survey focused upon consumers' acceptance of eight different types of online advertising formats (with an emphasis on prominent and "easy to understand" formats). These various formats were described to survey participants, alongside concrete examples to make sure that respondents knew exactly what was meant by, for instance, "splash page" or "non-skippable video".

Figure 1 : online formats (examples of visuals and associated explanations given to respondents ¹)

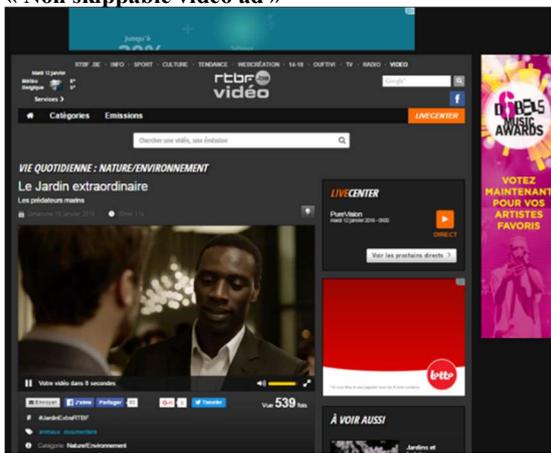
Classic Banners (static or animated)



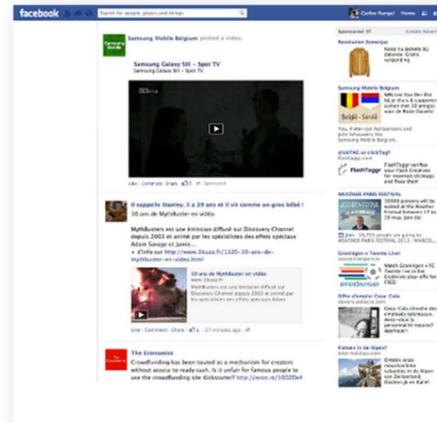
Videos I can avoid by skipping
« Skippable video ad »



Videos that I must watch to see what's next
« Non skippable video ad »



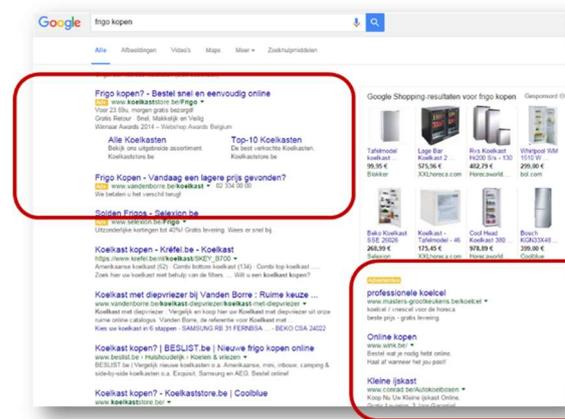
Advertising post on Facebook
« Facebook ad »



Promotional article or sponsored content
« Advertorial [-sponsored content] »



Text ad within a keyword search list of results (Google, Bing...)
« Search text ad »



¹ Author's own translations into English of questions and texts that were originally written either in French or in Dutch.

Splash page (advertising displayed when entering a website)



Complete take-over of a website page by a brand

« **Site customisation** »



Respondents were asked to assess each of the eight advertising formats on the following scale in order to understand their level of acceptance or rejection of each format:

- I am willing to watch this
- I might consider watching this
- I don't care
- I find it rather annoying
- It is irritating: it pushes me to avoid it or leave this website.

We then asked the respondents to rate each format depending on the device on which it appears: i.e. either on a computer or on a mobile phone (in hindsight, some could regret the absence of tablets in the scope).

Additionally, perceptions of brands collecting personal data were assessed through a series of simple 'yes' / 'no' questions:

- Brands owning data on me is by no means a problem
- I accept that access to free services (e.g. social networks, free web content) comes in exchange for personal data
- The fact that brands who own my data should definitely be regulated
- I currently use techniques to avoid sharing my data (e.g. cookie deletion / refusal)
- I don't object to sharing my data, but I do think brands should pay for it
- I am afraid of the possibility that hackers may gain access my data
- I am afraid of what brands could possibly do with my data.

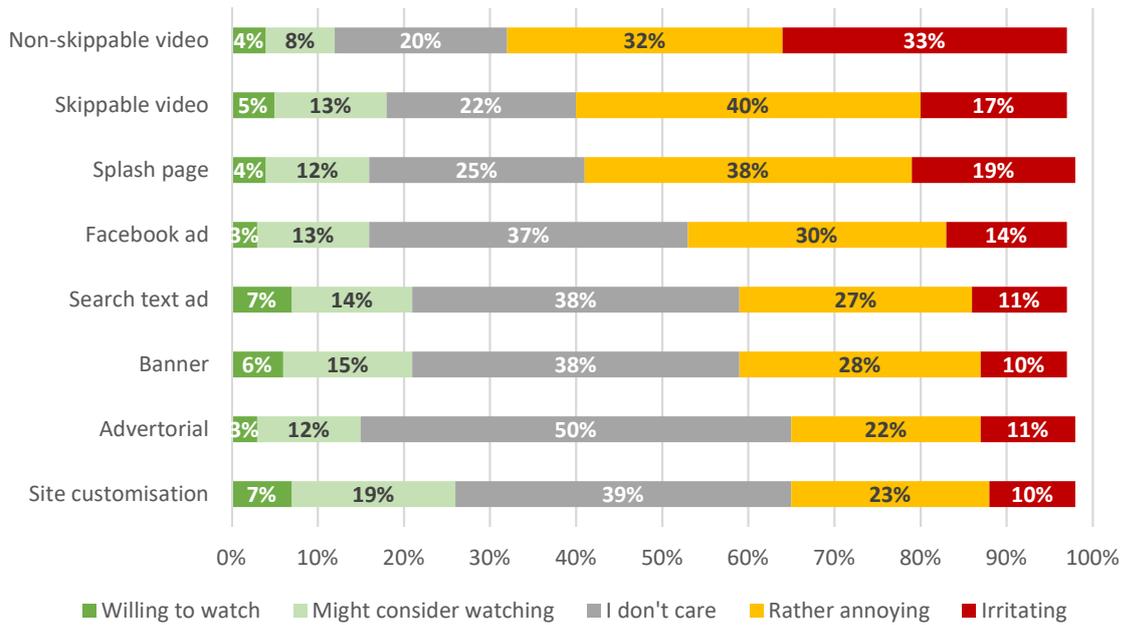
What people want (and what they don't want)

The first and the second elements of the 7 questions above have been used to analyse online advertising format acceptance (see below) and full results for all respondents can be found in figure 2 (computer) and 3 (mobile) with the percentage of people for every evaluation instance. Please note, for each question there is always a small proportion (average of 3%) of 'no-response', which explains why the final sum does not add up to 100%.

Unsurprisingly, only a tiny proportion of people (2 to 7%) claimed that they were "willing to watch" online advertising. This is consistent with data from other sources: in declarative surveys respondents often claim they don't pay attention to advertising, or that they avoid it entirely (Kantar Millward Brown, 2017; 2). Furthermore, it is generally accepted that adverts are usually watched at low attention levels: *"our advertising has to reach the brains of distracted, largely uninterested, potential buyers. Much of the time, they won't notice us, they will often only catch part of the ad, they won't put much effort into processing it"* (Sharp, 2014; 7).

Within the context of the computer, the proportion of respondents claiming irritation ranges from 10%, for banners and site take-overs, though to 33% for non-skippable video adverts, the most rejected of all formats. If we combine both computer and mobile devices, we can see that non-skippable video is rejected by almost two thirds of respondents.

Figure 2 : online formats evaluation – « on your computer »



Comparing figures 2 and 3, it is clear that irritation levels sharply increase on mobile. For example, when considering the significance of « irritating » on computer compared to mobile we see that differences between platforms are statistically relevant (99% confidence level) for every format. When we aggregate the « annoying » and « irritating » responses, differences between platforms are still significant, generally at the 99% confidence level. There are two exceptions: splash pages (differences significant to a 95% confidence level) and non-skippable video, where 65% of respondents rated it negatively on computer compared to 70% on mobile. On average, acceptance levels (i.e. “willing” or “might consider watching”) are 32% lower on mobile compared to on the computer.

Figure 3: online formats evaluation - "on your mobile"

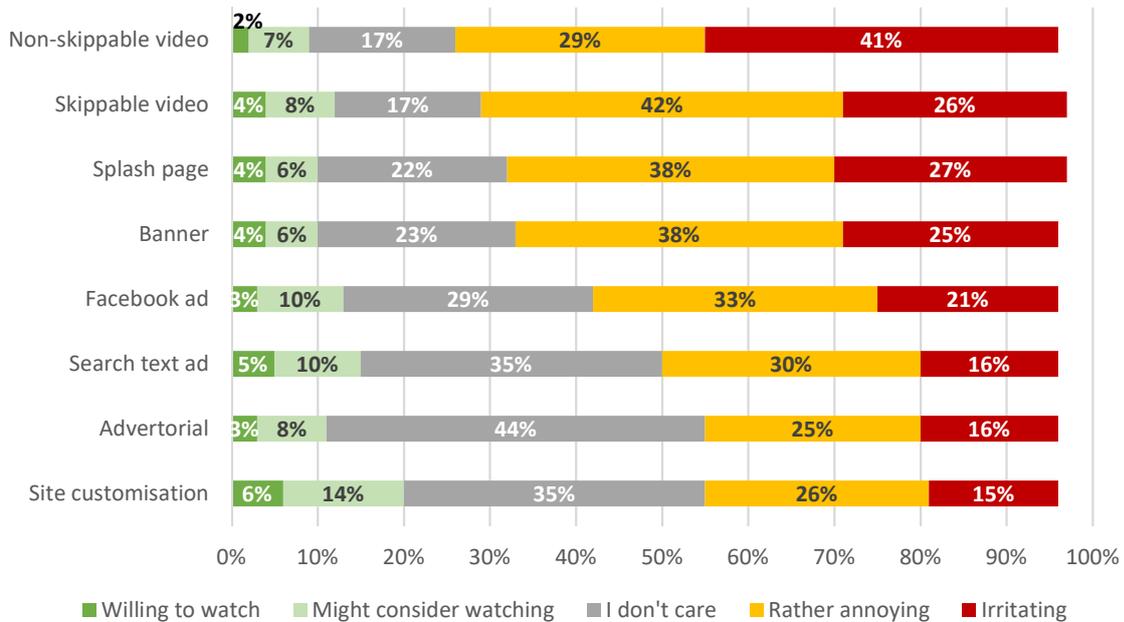
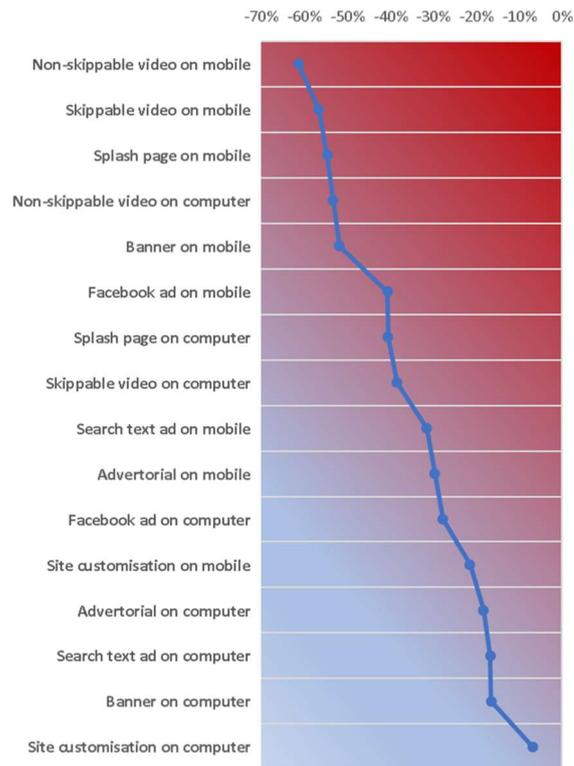


Figure 4 aggregates not only advertising format and device (i.e. computer or mobile), but also response type (e.g. “willing to watch”). Inspired by the ‘net promotor score’ calculation, the metric subtracts the “negative” responses (i.e. “rather annoying”+“irritating”) from the “positive” responses (i.e. “willing to watch”+“might consider watching”).

It results in “rating” values that range from mildly negative (“site customisation” at -7%, banners or search text ads at -17%) to almost universally rejected types of adverts, primarily available on mobile.

Figure 4: general rating all formats for all respondents



Demographics don't really matter...

Table 1, below, analyses ratings of the different advertising formats against a selection of demographics: gender, age, social grade, and also takes into account the presence of children within the household. Broadly, trends are consistent throughout the segments: online advertising is relatively less rejected on the computer than on mobile, and video and splash pages are more frequently disliked. On the contrary, everyone appears to accept advertising formats such as (highly visible) site customisations and (more discreet) text ads. The common denominator between the more frequently accepted formats is that they are not intrusive within the normal surfing experience.

Table 1: ratings of formats by demographic

Criteria		Computer							
		Banner	Facebook	Search text ad	Non skippable video	Site customisation	Splash page	Advertorial	Skippable video
Gender	Men	-18%	-28%	-20%	-48%	-11%	-38%	-15%	-35%
	Women	-15%	-28%	-12%	-59%	-3%	-44%	-22%	-42%
Age	18-24	-14%	-14%	-3%	-57%	3%	-37%	-6%	-54%
	25-34	-18%	-27%	-18%	-53%	-2%	-40%	-19%	-44%
	35-44	-23%	-26%	-13%	-57%	-8%	-49%	-13%	-39%
	45-54	-11%	-33%	-23%	-52%	-2%	-38%	-24%	-32%
	55+	-15%	-35%	-22%	-49%	-22%	-37%	-27%	-28%
Social status	GR 1+2 (upmarket)	-18%	-30%	-21%	-57%	-5%	-44%	-14%	-42%
	GR 3+4	-21%	-23%	-13%	-52%	-10%	-37%	-19%	-42%
	GR 5+6	-19%	-30%	-20%	-50%	-11%	-46%	-24%	-38%
	GR 7+8 (downmarket)	-2%	-27%	-8%	-54%	2%	-30%	-17%	-26%
Household with children	-18%	-26%	-18%	-53%	-5%	-38%	-14%	-34%	
Criteria		Mobile							
		Banner	Facebook	Search text ad	Non skippable video	Site customisation	Splash page	Advertorial	Skippable video
Gender	Men	-48%	-40%	-34%	-55%	-26%	-52%	-27%	-53%
	Women	-56%	-42%	-28%	-68%	-17%	-57%	-33%	-61%
Age	18-24	-56%	-22%	-13%	-63%	-10%	-54%	-12%	-65%
	25-34	-54%	-27%	-25%	-57%	-10%	-49%	-18%	-61%
	35-44	-54%	-45%	-31%	-64%	-23%	-63%	-26%	-58%
	45-54	-49%	-53%	-43%	-66%	-28%	-56%	-44%	-56%
	55+	-48%	-50%	-39%	-57%	-34%	-51%	-42%	-46%
Social status	GR 1+2 (upmarket)	-51%	-42%	-34%	-65%	-22%	-61%	-28%	-61%
	GR 3+4	-55%	-34%	-29%	-56%	-20%	-51%	-30%	-55%
	GR 5+6	-54%	-47%	-36%	-62%	-27%	-59%	-34%	-59%
	GR 7+8 (downmarket)	-44%	-39%	-23%	-61%	-14%	-41%	-27%	-48%
Household with children	-56%	-39%	-34%	-63%	-20%	-58%	-25%	-57%	

In some particular cases, like Facebook adverts, respondents under 35 seem to be more tolerant than older ones. Nevertheless, even heavy users of smartphones² clearly prefer seeing ads on their computer than on their pocket devices.

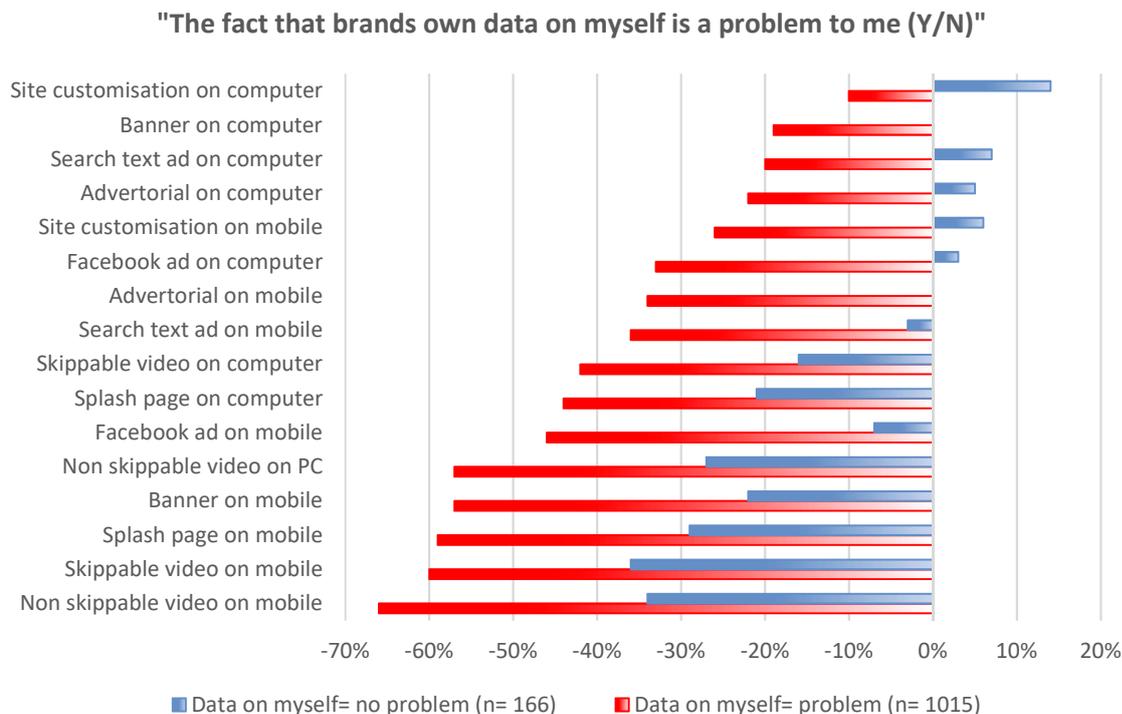
... but online mindset does

As referenced earlier, the study also focused on respondent's sensitivity to data privacy issues. We asked if respondents were concerned about brands owning their personal data, if they were willing to be paid for this data, and if they approved of the "deal" that underlies the online ecosystem: their data in exchange for free content. The study found that these attitudes towards data privacy actually play a role in the evaluation of online formats.

Specifically, we analysed levels of acceptance and rejection relating to the various online formats, and segmented people based on their response to the statement "brands owning my data is an issue for me". A large majority (86%) of respondents agreed; yes, they do have a problem with commercial brands getting hold of their data. Only 14% claimed they saw no issue with it. Both attitudinal groups show similar preferences to online types of advertising formats; most strongly rejecting video ads, non-skippable ads, splash pages - and mobile adverts were shown to be more problematic to everyone.

However, as shown in figure 5, below, the key difference between both groups lies in rejection level, which is consistently lower³ among people who see no issue in brands owning their data. For this type of respondent, the balance between negative and positive evaluations of online ads even reveals some "non-negative" values for "soft formats" (typically site customisations, advertorials, search text ads, banners or Facebook ads, but in the 3 latter cases - only on computer). In other words, respondents who have no issue with brands owning their data do accept forms of "soft advertising," although preferably not on their mobile device.

Figure 5: online format ratings vs data privacy attitude



There is a small group (1 in every 6 people) who are positively oriented towards, some, online ad formats. People in this group tend to be young (under 35) and of a mid-social grade. Aside from their demographic profile, these results also reveal a critical learning: once people feel comfortable with the "data issue" they might be more open and receptive to online advertising, as long as it respects their online experience.

² Unpublished data from IPSOS in Belgium measured a daily smartphone consumption of 219' for 18-34 yo, 169' for 35-44, 106' for 45-54, 83' for 55-64 and 69' among 65-75 years (Sep-Oct 2016, CAWI, n= 4.398. Mean all respondents = 162 minutes).

³ Statistically significant at 99% confidence level for the difference in ratings of each individual format in the two segments (people seeing a problem in brands owning their data and those who don't see any issue in it).

Discussion: about video and mobile

One of the most surprising outcomes of the Space2Face results was the difference between skippable and non-skippable video advertising compared to other formats: there is a clear divide between formats which interrupt, such videos and splash pages, and formats which do not interrupt the online experience. This makes sense if one assumes that online activity is about speed, and that even the 5 seconds of forced exposure to “skippable video” (for example on Youtube) will be perceived as a negative experience. This finding contrasts with other ones, for example PageFair (2017;14) who found that “skippable video ads” appear amongst the “preferred” type of messages. There is no clarity on how the questions were asked in other surveys, but in the Space2Face survey the key issue for respondents is interruption; even a very short break in their online experience appears to be too much.

As discussed, Space2Face data consistently shows that advertisements on mobile are generally disliked by respondents. This relates to the “*digital bubble of context and activity*” (Wright, 2016; 46) whereby people are usually more actively engaged during their mobile experience: arguably advertising is regarded as most irritating in this context because it breaks “the bubble.” Interestingly, a UK report on adblocking noticed that “*people are more tolerant of ads that don’t interrupt their user experience*” (IAB UK, 2016; 14). Similarly, in “Ad blocking goes mobile,” PageFair highlights that adverts on mobile devices result in a reduction of connection speed, an increase in bandwidth and battery consumption, and in a larger usage of mobile data (at the cost of the user, not the advertiser). By contrast adblocking browsers, the most common solution used by consumers, “*improve page speed and reduce bandwidth consumption on mobile*” (PageFair 2016; 10).

Lessons learned: 3 possible directions

Listening to consumer opinions is good; taking action based on these insights is better. In this respect, we have identified three possible implications of this research.

Solution #1 : continue with the status quo, ignoring the warning signs

The first possible solution is for brands to simply ignore these results. This would mean continuing with non-skippable advertising formats, which potentially interrupt user experience, on both mobile as well as on other devices.

Findings in advertising effectiveness might encourage brands to continue in this way: in June 2015, a survey by Vivaki France concluded that forced exposures, and especially forced exposures on mobile devices, were far more effective than any other forms of (in that case) video advertising (Vivaki, 2015; 10-12 & 30-31). As shown in table 2, below, non-skippable adverts have an overall impact score which is 12% higher than the benchmark (i.e. linear TV ads), and messages on a smartphone may increase impact ⁴ by more than 20%.

⁴ Based on the « V-score », average across all impact metrics : TOM, spontaneous awareness, aided awareness, noting (Vivaki 2015 ; 12).

Table 2: Overall impact scores [Source: Vivaki 2015; 30-31]

Format	Device	Index	Skippable
Interstitial	Smartphone	137	No
Catch-up pre-roll	Smartphone	128	No
In stream non skippable pre-roll	Smartphone	127	No
Interstitial	Tablet	121	No
Video banner	Smartphone	119	Yes
In stream non skippable pre-roll	Tablet	115	No
Catch-up pre-roll	Tablet	115	No
Video banner	Tablet	102	Yes
In stream non skippable pre-roll	Tablet	100	Yes
Linear TV [base]		100	
In stream non skippable pre-roll	Computer	99	No
Catch-up mid-roll	Computer	98	No
In stream skippable pre-roll	Smartphone	98	Yes
Catch-up pre-roll	Computer	92	No
Catch-up pre-roll	IPTV	92	No
In stream skippable	Computer	91	Yes
In banner	Computer	88	Yes
In stream	Computer	86	Yes
Any format	Any device	112	No
Any format	Any device	94	Yes

Television ads are often considered interruptions, and generally disliked by consumers. Nevertheless, there is consistent evidence that television advertising keeps on delivering robust business results, even in the digital age (Binet & Field, 2013; 41-45 ; 2017; 48). Based on these considerations, one could argue that there is little imperative to stop interrupting consumers.

However, there are limits to this strategy.

Firstly, we are seeing a rise of ad blocking by consumers. The latest available statistics show that ad blocking on mobile devices is higher than the usage of ad blocking on computers, both in absolute numbers of users and in terms of growth rate (PageFair 2017; 5). The most commonly cited reasons for the use of adblocking are virus or malware concerns and interruption from advertisements. (PageFair 2017; 12). Therefore, simply ignoring the issue poses a medium-term threat to potential reach of online advertising.

Secondly, there is a difference between digital and off-line advertising in consumers' minds. While some may think that online ad-blocking does not structurally differ from offline ⁵ (Calmard, 2015), there is strong evidence to suggest that online advertising is significantly less appreciated by even the most digitally connected consumers (Kantar Media, 2017; 15). As shown in table 3, below, this finding is supported by Millward Brown's data on advertising receptivity (Poole, 2017), where we can see there is a very clear divide between perceptions of online and off-line advertising.

⁵ [About offline ad avoidance] « On radio, consumers change the station by simply pushing with their fingers. On TV they zap or take advantage of ad breaks to perform parallel tasks [...]. In print media, they simply turn the pages ». Author's translation of an article originally published in French.

Table 3: Receptivity by media category

Format	Receptivity in %	Type
Magazine ads	35	
Outdoor ads	34	
Newspaper ads	26	
Cinema ads	24	
Direct mail	8	
Radio ads	1	
TV ads	-6	[Mainly]
Product placement	-14	offline
Online search	-33	
Online display (laptop/PC)	-46	
Online video (laptop/PC)	-50	
Online display (mobile)	-53	
Online video (mobile)	-56	Online

Source: Millward Brown

These other sources confirm that, ‘there is something different with digital’ and in this respect, if brands are to continue as they always have done they may face problems in the future. Technically, ad-blocking software can help people easily translate their negative digital experiences into a systematic online advertising avoidance. And once they have installed this software, they are generally reluctant to disable it (PageFair, 2017; 13).

Solution #2 : go native

To deeply integrate advertising into the user’s experience, one solution is to leverage native advertising. As IAB France (2014; 11) described it, native advertising is characterized by 4 pillars: it is placed in-stream, it is formally similar to the editorial content, it leads to an internal landing page, and it is aimed to generate consumer’s engagement instead of direct sales. This integration into the normal user experience helps to resolve the issue of interruption.

From a user experience point of view, consumers are open to this approach: “consumers are very open to custom content as a more relevant, creative and interesting way for brands to connect” (Time Inc., 2017). Nevertheless, native advertising cannot be a universal solution. Firstly, native advertising is under increasing scrutiny from regulatory bodies, who are urging for a clear distinction between editorial and commercial content, and for non-ambiguous identification of the advertiser(s): these interventions could potentially make native content less naturally integrated into the surrounding context. Indeed, in Belgium the local regulator has already issued a statement on the necessary identification of native content as advertising, and of the sponsoring brand or product behind it (Raad voor Reclame, 2016; 2-3). It is unlikely that they are the only regulators with concerns. Publishers are also highly aware of a necessary distinction between native advertising and editorial content, and a recent report from FIPP UK highlights that “lack of separation of the editorial and the commercial side” is the very “biggest threat” to native advertising (NAI-FIPP, 2016;32).

Secondly, whilst native advertising is interesting for certain brands and certain product categories, it is certainly not suitable for all brands, in all situations, or in all phases of a product lifecycle. Native advertising also demands that advertisers constantly create “new, entertaining and distinctive” stories (Sharp, 2010; 206-208), which relate to the specific brand, alongside editorial content which really appeals to consumers. Experience shows that this isn’t impossible, but it’s not easy either. Certainly, publishers perceive that one of the major challenges in native advertising is linked to “convincing advertisers, especially to tell real stories” (NAI-FIPP, 2016; 29).

Solution #3 : the « new deal »

Next to the relatively extreme positions described above, a third - more balanced - solution seems to make more sense and is supported by findings from our Space2Face survey. It consists of 6 guidelines:

1. **Adverts which interrupt should be the exception.**
Advertising formats which interrupt should be limited, and where possible we should opt for skippable content. However, even this format should be used with caution: the survey has shown (see above) that skippable video content is not very welcome.
2. **If you must interrupt, make sure you target the right people, on the right device, at the right time.**
When interruptive adverts are needed, the rules should be to target them towards the right people, and in a relevant moment. This is especially true on mobile devices. These measures will help reduce any negative feelings which do arise from the interruption.

3. **Limit the frequency of adverts which interrupt**

When using high impact (or high interruption) advertising formats, a moderate frequency capping should be mandatory across sites and across platforms. People often complain about high frequency online campaigns (Kantar Media, 2017; 29) and this implies that measurement tools should be developed to optimise planning and in doing so satisfy both the targeting and the frequency capping requirements, regardless of the device.

4. **‘Low tech’ does not mean low value when it comes to effectiveness.**

Banner adverts and other less sophisticated, non-invasive formats should not be wholly disregarded as main or complementary online campaign approaches. As emphasized by Millward Brown (Gomy & Jouvin, 2014; 22), “*static images, simpler and more focused, prove to be more efficient on all metrics* [ad recall, aided recall, brand linkage, positive opinion of brand, buying intent] ⁶”. Vivaki (2015; 44) also pointed out that the added effectiveness value of large and sophisticated formats, such as video adverts, were often not worth the extra cost compared to more basic forms of advertisements.

5. **We should forever remember the famous ‘We messed up’**

Commenting on the rise of ad blocking software (IAB, 2015) Scott Cunningham famously admitted that the industry had paid too little attention to user experience. He called advertisers to apply LEAN (Light, Encrypted, Ad choice based, Non invasive) principles, and the Space2Face data supports this. Detailed insights from the Coalition for Better Ads (2016) may be of major help too.

6. **And, finally, educate.**

One of the main learnings from our survey is that people who are comfortable with the question of data and/or the ones who agree with the deal “advertising and my data pay for [extra] content” are somehow happier to accept online advertising. There is hope that this tiny minority could be stretched to a wider base, if a convincing explanation is given to consumers. Publishers should therefore promote their business model and explain that advertising pays a for a part of their “free” offering. Transparency is also critical, and publishers should explain how they process and use the data from their consumers, readers, or viewers with care and respect.

These guidelines and behaviours define what we call the “new deal”: online advertising is a contract that includes mutual give and take aspects from advertisers, publishers, and consumers. It implies major improvement of third party measurement: moderating frequency across platforms and properties, and managing exposures to the right person and context do exclude “enclosed areas” that we currently find at some major players in the online market.

Conclusion: the “new deal” may bring value to anyone

The Space2Face survey has helped us to understand “*what is acceptable to online audiences*” (Cools & Radochitzki, 2017; 20). In line with the “we messed up” statement (IAB, 2015) this has light shed on advertising acceptance, and should lead to action. A ‘soft reset’ in online advertising is required and should combine a more comprehensive knowledge of the consumer, a larger mix of adverting formats, along with less frequency and a closer monitoring of exposure. This “new deal” will raise the bar of effectiveness by providing consumer with a better online experience, and advertiser with more impactful advertising. And, ultimately, upgrading value for their partners may in turn result in improved revenue bases for publishers.

⁶ Author’s own translation of comments that were originally written in French.

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