AD BLOCKING

in Greece

Ad Blocking in Greece
November 2017

tailwind
Business Fast Forward

Agenda

> Introduction

> Survey Overview

> 2017 Survey Findings
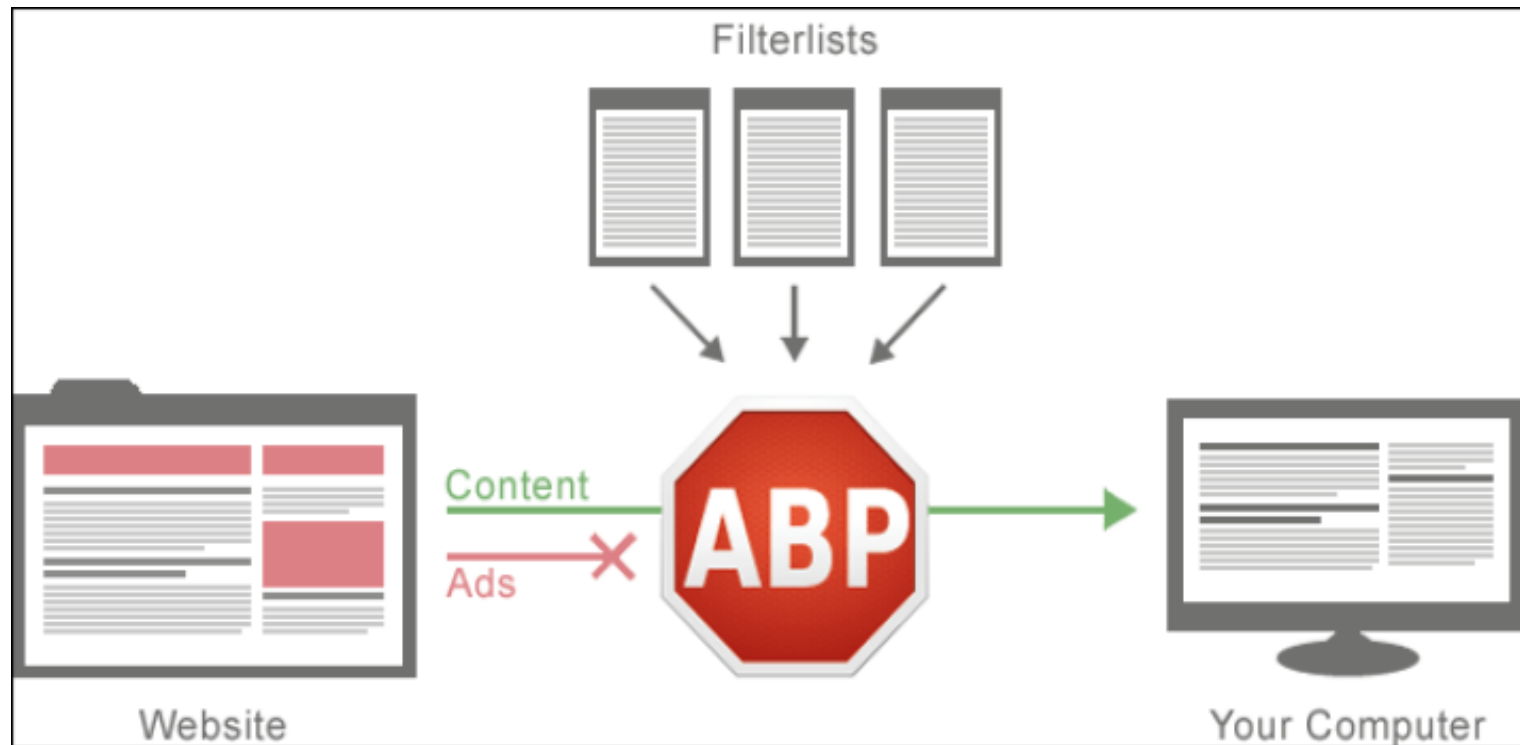
> Summary

> What can be done? Advertiser Perspective

Introduction
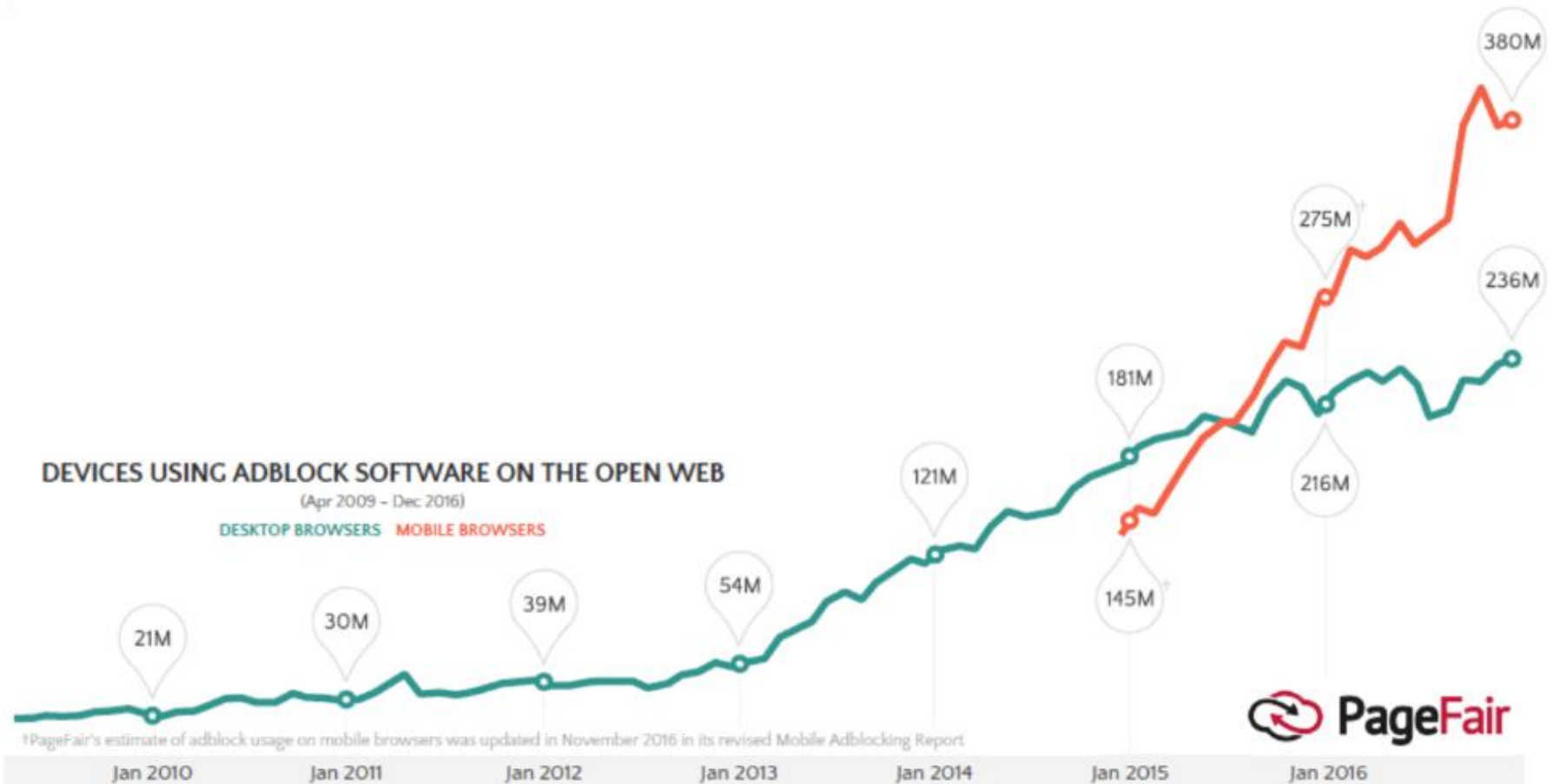
What is Ad-Blocking?

› Ad blocking is a technology that consumers use to prevent the download or display of advertising.

DEVICES USING ADBLOCK SOFTWARE ON THE OPEN WEB
(Apr 2009 – Dec 2016)

DESKTOP BROWSERS   MOBILE BROWSERS

380M
275M
236M
216M
181M
145M
121M
54M
39M
30M
21M

Jan 2010   Jan 2011   Jan 2012   Jan 2013   Jan 2014   Jan 2015   Jan 2016

†PageFair's estimate of adblock usage on mobile browsers was updated in November 2016 in its revised Mobile Adblocking Report

PageFair

Ad blocking Landscape

Apps

ABP
Ad block Plus

AppBrain
Ad detector

AdShaker

Crystal Ad block

MOBILE ADS

Browsers

UC Browser

brave

MINI

Survey Overview

The 2ⁿᵈ edition of the survey about the usage of ad blocking in Greece and consumers stance towards online advertising.

Sponsored by:

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Research Overview

› Quantitative

  › Observational data (% of browsers with & w/o ad blocker, total and per device)

  › Via Oriel's script implemented across 72 websites

  › Period: 15-30/10

› Qualitative

  › Attitudinal & Demographic data (users profile, attitudes towards ad blocking & online advertising)

  › Via on online questionnaire
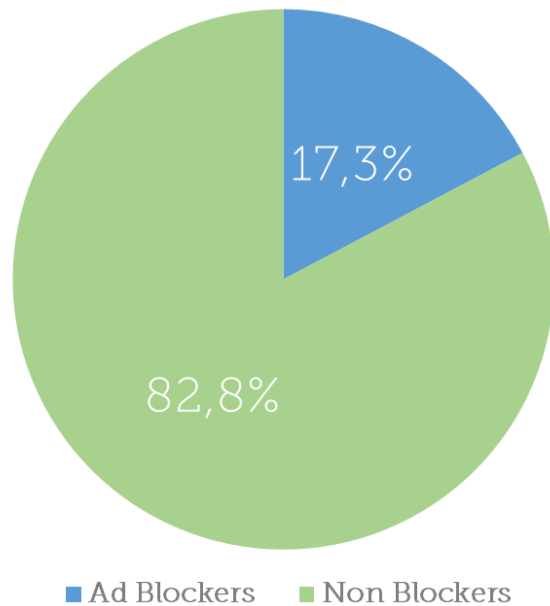
  › Period: 11/10-23/10

  › Sample size: 2,782

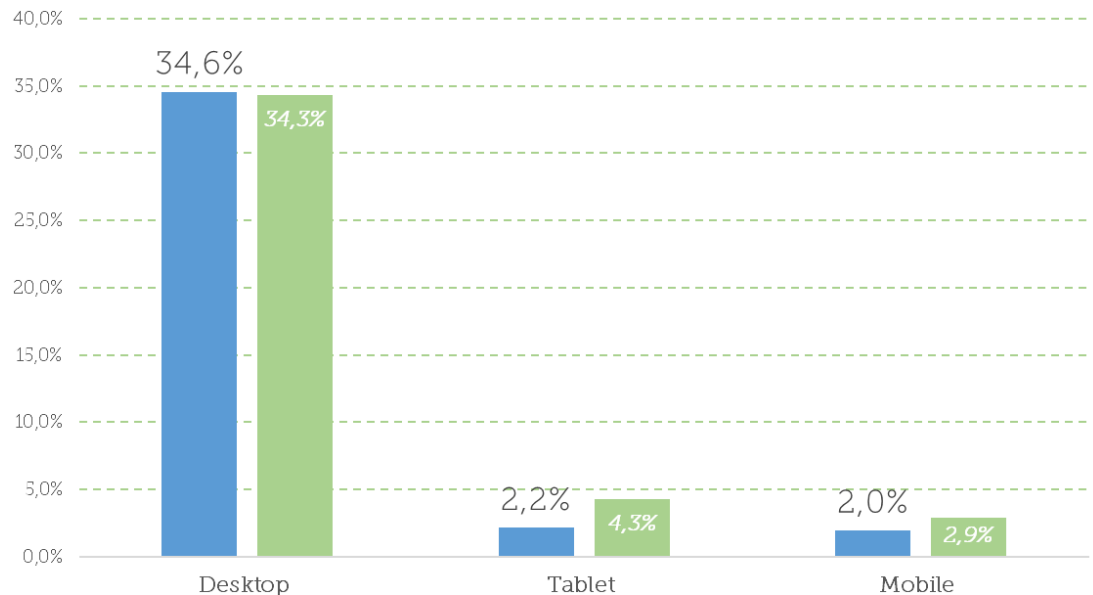# Findings

Usage of Ad blocking in Greece 2017

Use of ad blockers – Total

17,3%

82,8%

■ Ad Blockers   ■ Non Blockers

Use of ad blockers – Per Device

	Desktop	Tablet	Mobile
Ad Blockers	34,6%	2,2%	2,0%
Non Blockers	34,3%	4,3%	2,9%

› Small overall drop on usage of ad blocking (-2%), compared to 2016 **BUT** this is only due to increase of Mobile (+9%) users vs Desktop (-5%) users.

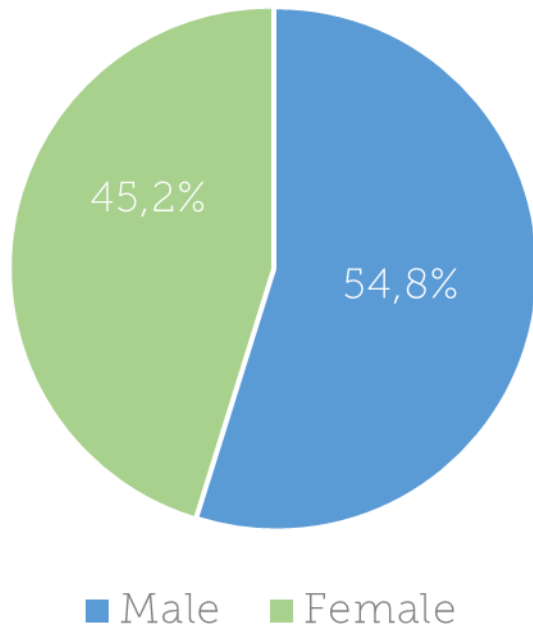› Positive sign that ad blocking on mobile & tablet is still low.

Data refer to unique browsers

Ad blockers Profile
(out of those who currently use an ad blocker)

Gender

45,2%

54,8%

- Male
- Female

Age

35,0%
30,0%
25,0%
20,0%
15,0%
10,0%
5,0%
0,0%

17,2%   29,9%   25,6%   15,2%   12,0%

18-24   25-34   35-44   45-54   55+
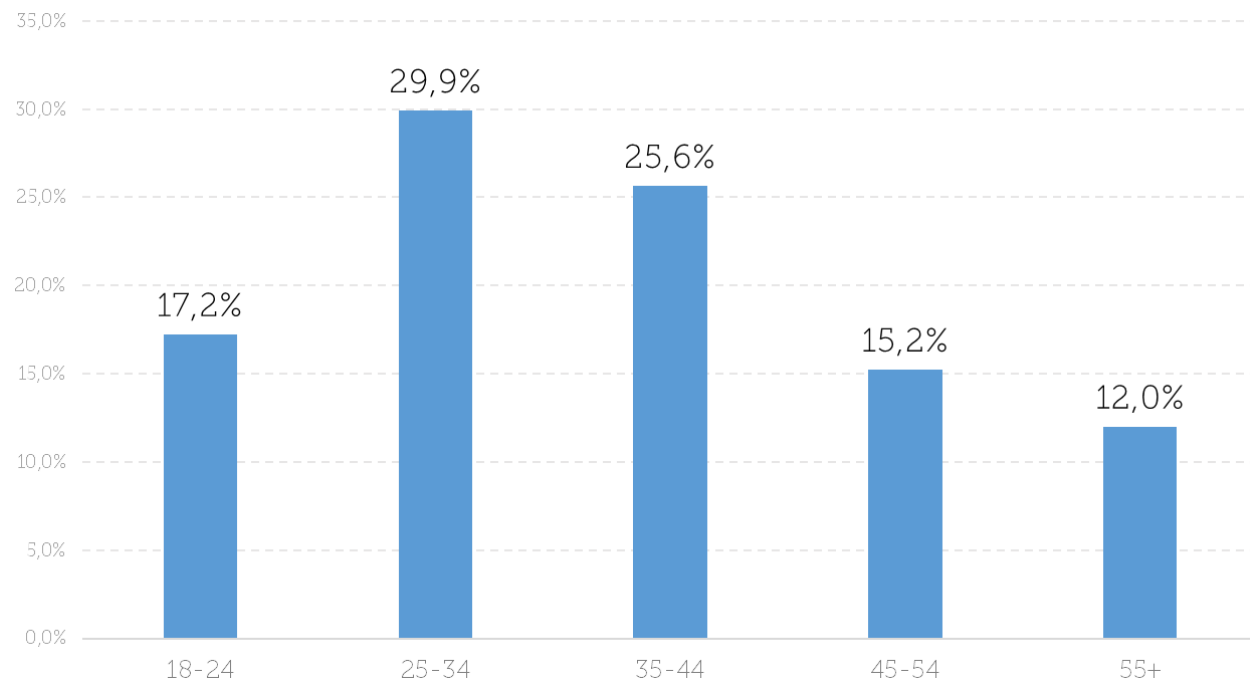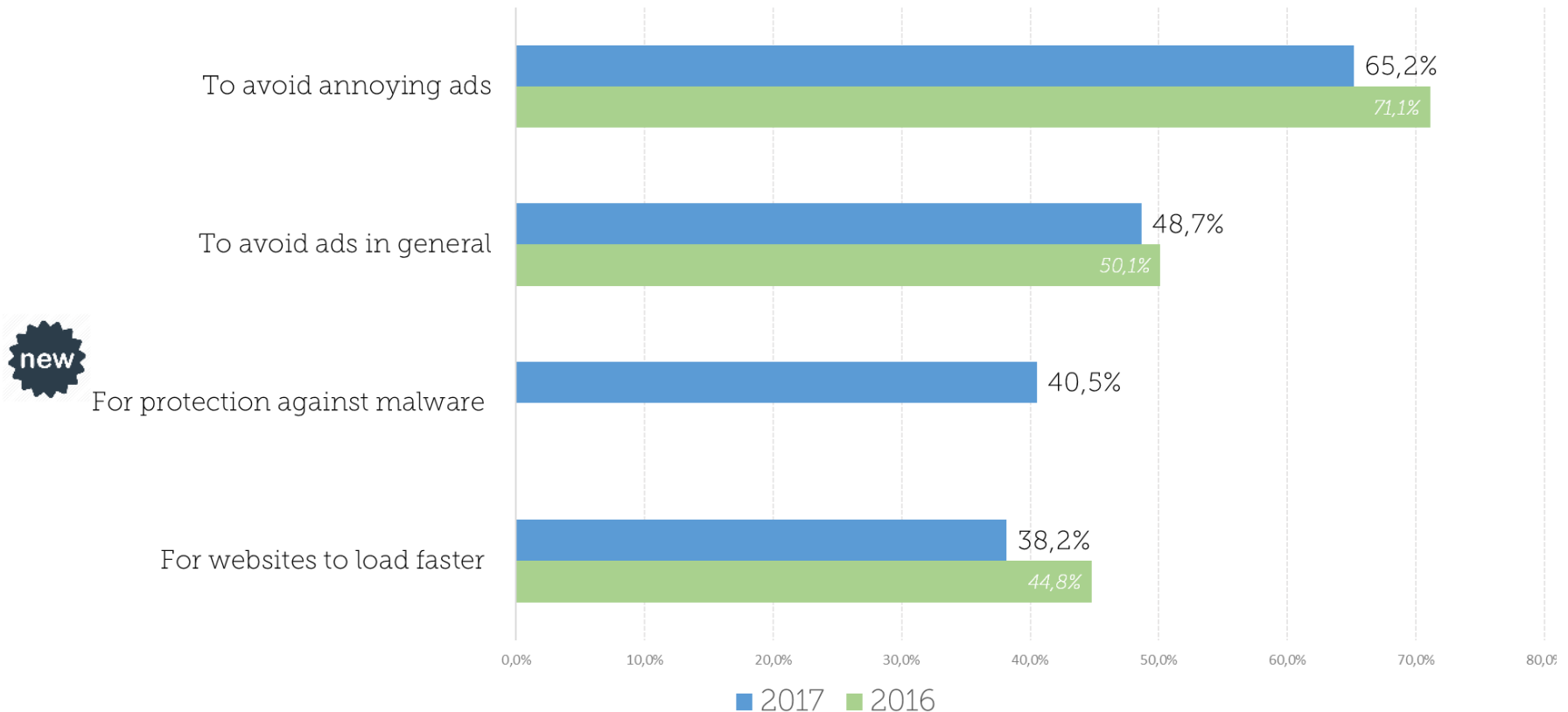
› Profile of the Greek Ad Blocker the same (Man, 18-34, of higher education) BUT women are catching up (+6% compared to 2016).

Top reasons people install an ad blocker
(out of those who currently use an ad blocker)

To avoid annoying ads
- 65,2%
- 71,1%

To avoid ads in general
- 48,7%
- 50,1%

new

For protection against malware
- 40,5%

For websites to load faster
- 38,2%
- 44,8%

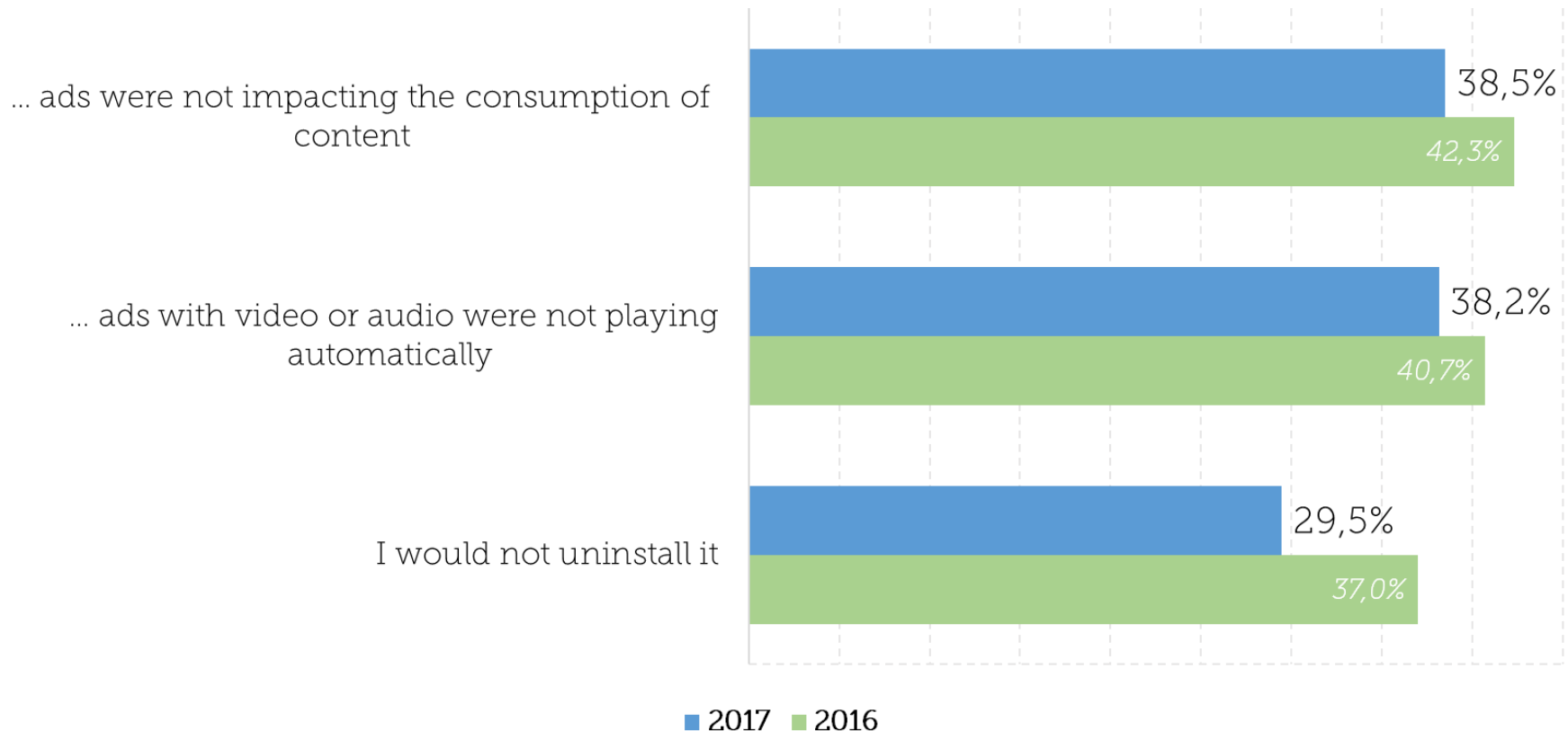0,0% 10,0% 20,0% 30,0% 40,0% 50,0% 60,0% 70,0% 80,0%

■ 2017 ■ 2016

› UX is still the key driving force.

› Security is gaining ground (40,5%)

I would uninstall my ad blocker if…
(out of those who currently use an ad blocker)

... ads were not impacting the consumption of content — 2017: 38,5% | 2016: 42,3%

... ads with video or audio were not playing automatically — 2017: 38,2% | 2016: 40,7%

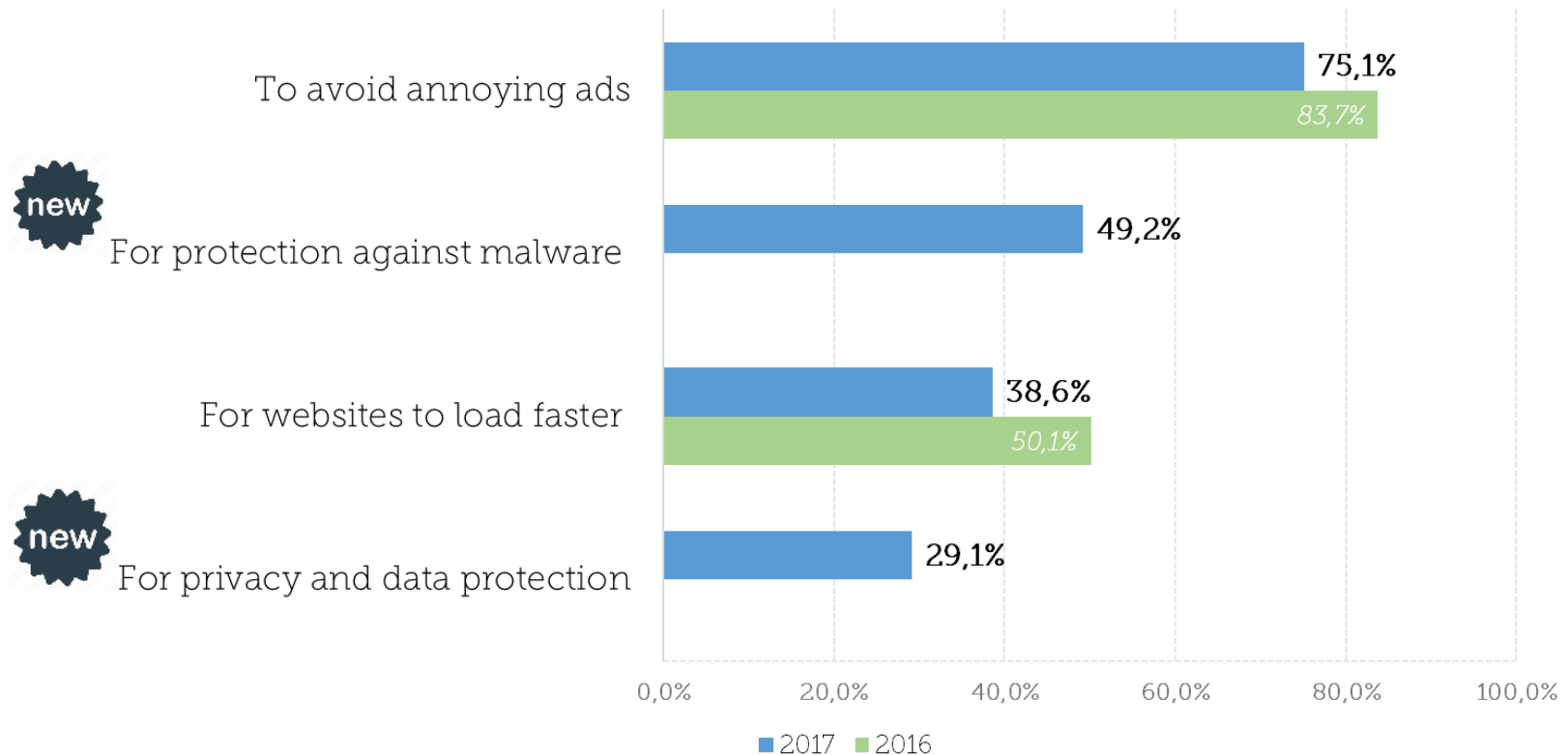I would not uninstall it — 2017: 29,5% | 2016: 37,0%

■ 2017 ■ 2016

› Better UX and less intrusive ads = Decrease in ad blocking

› Hardline supporters of ad blocking have decreased (29,5% vs 37%)

Top reasons people would install an ad blocker
(out of those who do not use an ad blocker)

To avoid annoying ads: 75,1% (2017), 83,7% (2016)

new For protection against malware: 49,2% (2017)

For websites to load faster: 38,6% (2017), 50,1% (2016)

new For privacy and data protection: 29,1% (2017)

■ 2017 ■ 2016

› 53% of women plan to install an ad blocker in the next 3 months

› Security & Privacy are gaining ground, especially among Women

› Loading time a key concern of people 18-24 y.o.

What kind of ads drive consumers to ad-blocking
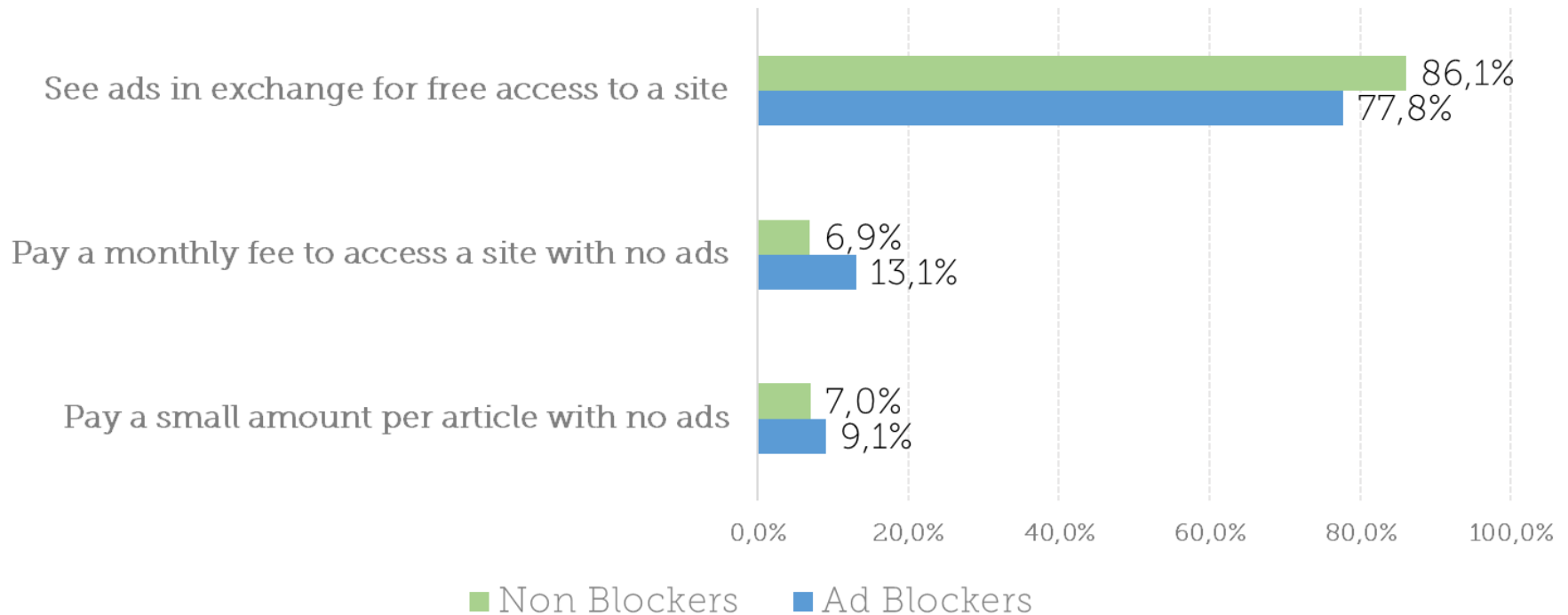## (all respondents)

Chart showing percentages for Non Blockers and Ad Blockers:

- Ads that play video/audio automatically
- Video ads without a skip button
- Ads that move/block page content
- Ads with bold/ flashing color
- Ads that play video automatically audio starting automatically
- Ad with features (image, letters) that shake
- Video ads with skip button after few seconds
- Ads related to products I've looked/bought at another site

Legend: ■ Non Blockers ■ Ad Blockers

Axis: 0,0% 10,0% 20,0% 30,0% 40,0% 50,0% 60,0% 70,0% 80,0% 90,0% 100,0%

› Ads that interfere with browsing experience or limit control, are the most annoying

Preferred way for accessing content
(all respondents)

See ads in exchange for free access to a site	86,1% / 77,8%
Pay a monthly fee to access a site with no ads	6,9% / 13,1%
Pay a small amount per article with no ads	7,0% / 9,1%

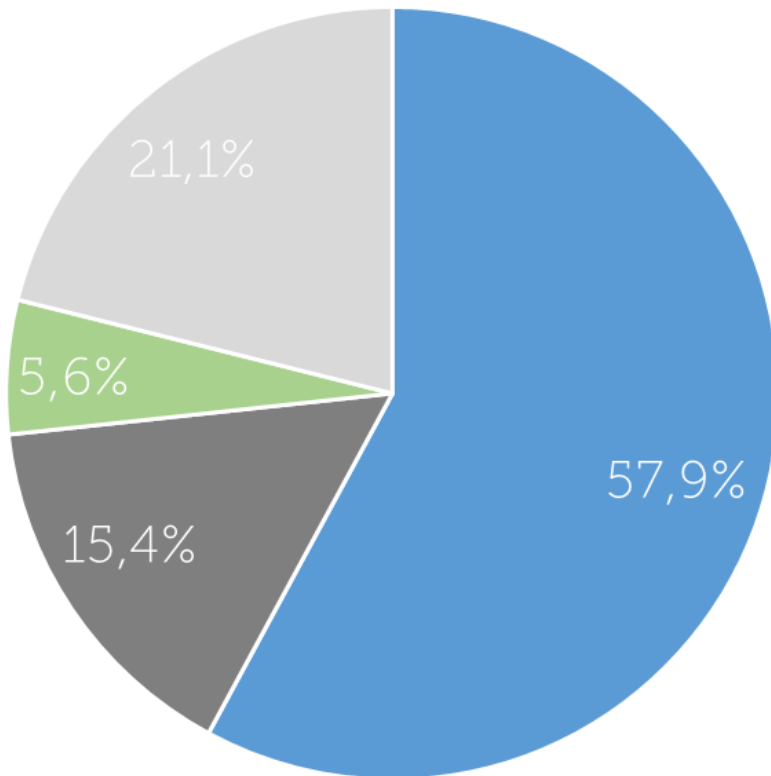0,0%   20,0%   40,0%   60,0%   80,0%   100,0%

■ Non Blockers   ■ Ad Blockers

› Ad blockers, more willing to pay a subscription fee for accessing content

Monthly fee for ad-free access?
(out of those who would pay a monthly fee)

Ad Blockers

57,9%
15,4%
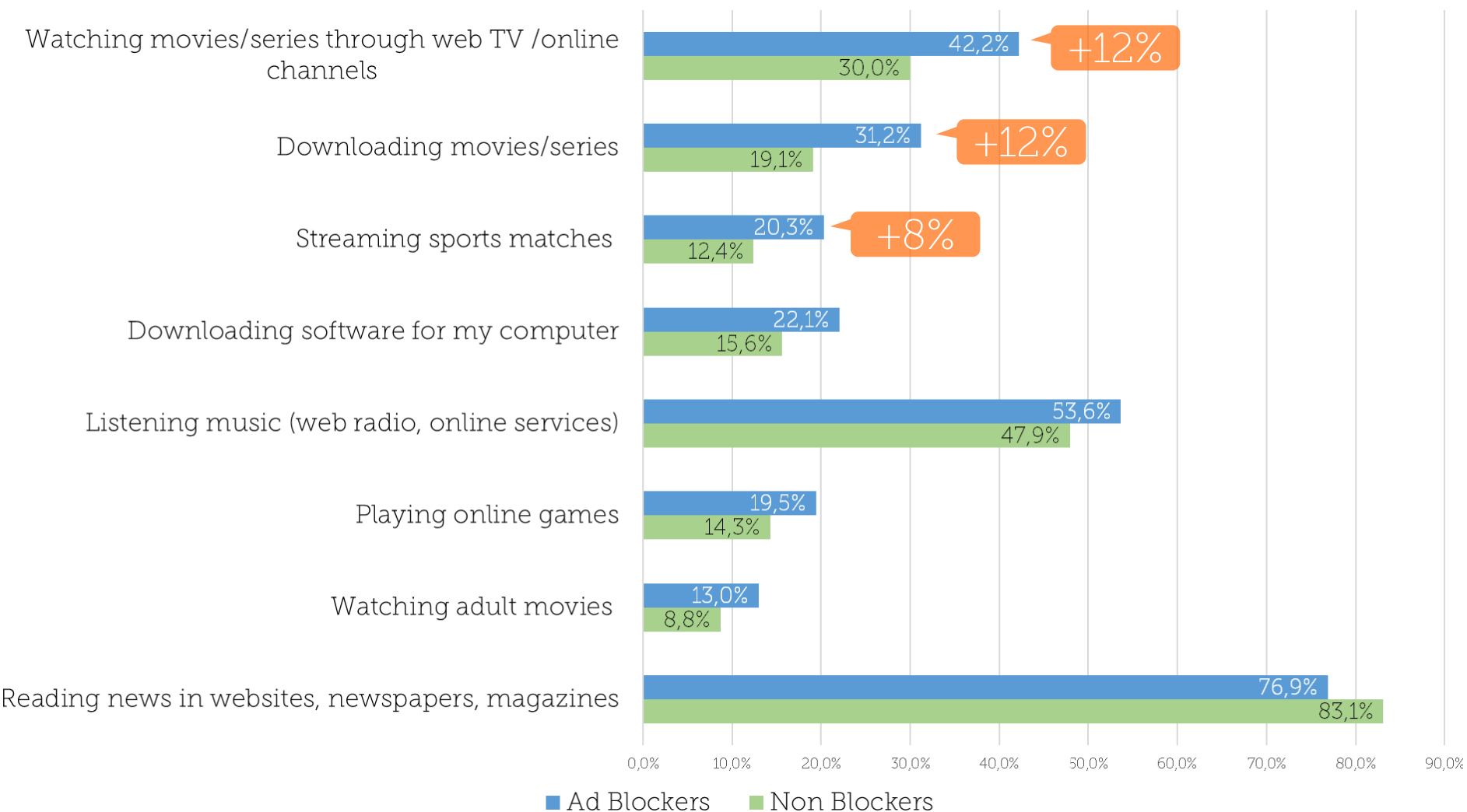5,6%
21,1%

Non Blockers

1,3%
11,1%
30,7%
56,9%
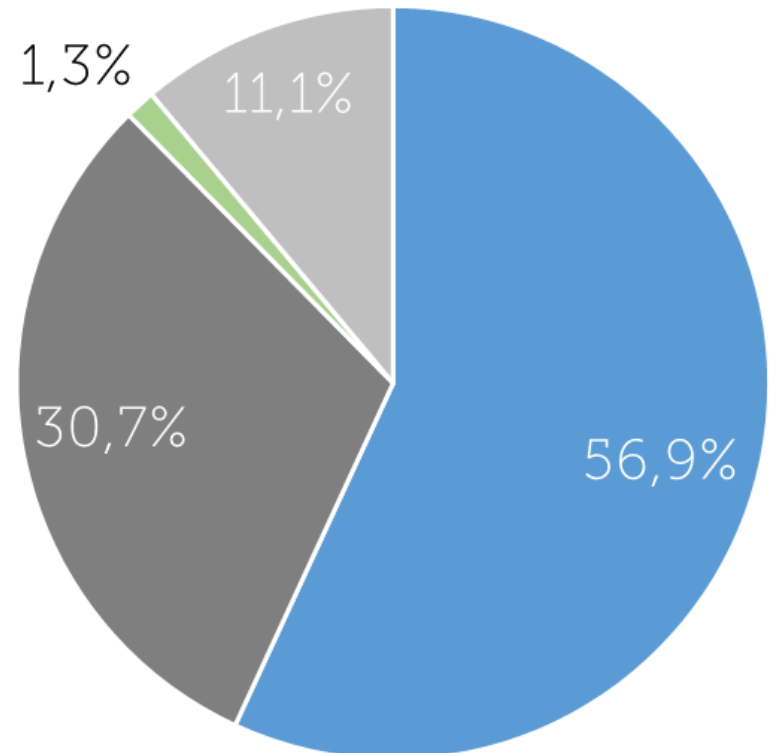
- 2–4 €/month
- 4-6 €/month
- 6-8 €/month
- Prefer not to answer

› Ad blockers x4 more willing to pay 6€-8€

Which activities drive ad-blocking usage?
(all respondents)

Activity	Ad Blockers	Non Blockers	Difference
Watching movies/series through web TV /online channels	42,2%	30,0%	+12%
Downloading movies/series	31,2%	19,1%	+12%
Streaming sports matches	20,3%	12,4%	+8%
Downloading software for my computer	22,1%	15,6%	
Listening music (web radio, online services)	53,6%	47,9%	
Playing online games	19,5%	14,3%	
Watching adult movies	13,0%	8,8%	
Reading news in websites, newspapers, magazines	76,9%	83,1%	

0,0% 10,0% 20,0% 30,0% 40,0% 50,0% 60,0% 70,0% 80,0% 90,0%

■ Ad Blockers ■ Non Blockers

Initial Better Ads Standards

Coalition for Better Ads

DESKTOP WEB AD EXPERIENCES

Pop-up Ads

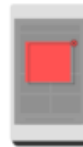Auto-playing Video Ads with Sound

Prestitial Ads with Countdown

Large Sticky Ads

MOBILE WEB AD EXPERIENCES

Pop-up Ads

Ad Density Higher Than 30%

Flashing Animated Ads

Postitial Ads with Countdown

Prestitial Ads

Full-screen Scrollover Ads

Auto-playing Video Ads with Sound

Large Sticky Ads

Summary

› Ad blocking in Greece at 17,3% BUT primarily

due to increase of mobile usage

    › Desktop from 34,3% increase to 34,58%.

    › Mobile & Tablet at 2% and 2,2% respectively.

› Women are catching up in ad blocking usage

(+6% compared to 2016).

Summary

› People install ad blockers to primarily avoid

"annoying" ads.

   › Security & Privacy is also gaining ground.

› Difference in online activities

heavily influences usage of ad blocking.

   › Watching & Downloading movies/series,

   Streaming sports matches

What can be done? Advertiser Perspective

› Think as a user not a as marketer

› Demand your partners to do the same

› Push for adoption of New ad standards

› Evaluate based on qualitative metrics (i.e. Viewability, Dwell Time, Engagement, Bounce Rates)

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Thank you!
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