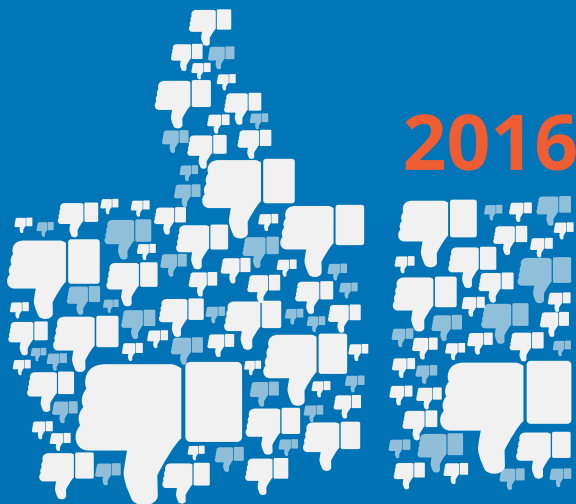


AD BLOCKING IN ROMANIA



STUDY ON THE USE OF AD
BLOCKING: HOW MANY AD
BLOCKERS ARE INSTALLED
AND WHY ROMANIANS AVOID
CERTAIN ONLINE AD FORMATS?

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Foreword

Foreword

This study is the result of the work of specialists in digital media, research and technology, as part of a project that took nearly six months.

On a proposal from **IAB Romania**, the specialists of companies **TailWind Romania** (operator of **Project Agora**) and **Quantix** have conducted, by using state-of-the-art technology in the face of a relatively new phenomenon (the rise of ad-blocking), a complex study in three distinct stages:

1. Measuring the ad blocking rate on the websites member of the IAB Romania, by using the **PageFair** technology
2. Collecting responses in a questionnaire targeting both those who have installed an ad blocker for online advertising and those who do not use ad blockers
3. Correlating and interpreting data

The study, however, is not just meant to roughly record the number of those who installed an ad blocker, but also to make us understand the rationale behind this phenomenon which strongly affects the way in which the digital industry currently works.

Figures clearly point to certain trends:

-while, overall, the ad-blocking rate is higher (nearly 18% according to previous studies), when it comes to websites observing the IAB (Interactive Advertising Bureau) standards, the rate is lower, on average: 13.9% (between extremes of 21.8% on sports websites and of 7.2% on websites for children and families).

Foreword

-the leading reason to install ad blockers is the "non-regulated" market (the second most important reason to install ad blockers is related to watching movies and series online, considering that only websites streaming illegal content online deliver advertisements).

-the 13.9% already using an ad blocker are bound to keep it, and, among those that heard about ad blockers, 18% intend to install one soon. Therefore, the use of ad blocking is likely to increase significantly in the coming year.

IAB Romania plans to conduct this study annually, in order to track a trend meant to raise awareness in the entire industry – from customers and creative and media agencies to publishers – on conceiving and promoting advertising campaigns in the online environment that strictly observe the standards and recommendations of the IAB, as well as the good practices urging for the unfolding of these campaigns in a responsible and non-intrusive manner.

Key Facts and Figures

- Internet users employing or planning to install ad blocking apps feel aversion toward certain types of online advertisements.
- This reaction is fueled by the aggression of some advertisements/campaigns and the way ads are displayed, which leads to blocking the activities of web surfers, but is unrelated to the actual content of ads.



96%

The intention to use ad-blocking software in the future is very big: 96% of those who installed an ad blocker say they will keep using it.

- Online ads mostly affect the following activities: reading news and information (79%, mainly the 24-34 age group), watching movies and series online (56%, mostly users aged under 18) and listening to music (48%, youths aged under 24).
- Please note that the second most important reason to install ad blockers is related to watching movies online, although websites streaming legal content do not deliver advertisements



95%

Floating ads are deemed most intrusive, being rejected by 95% of respondents

Key Facts and Figures

- The level of tolerance for any kind of intrusive advertising message is extremely low, but in-stream video adverts are the most „tolerated“ ad formats (16% accept them), retargeting (12.6% accept them) and interstitial ads (12.1% accept them). The rest of intrusive ad formats (expandable, auto-playing, floating ads) are firmly rejected by over 90% of respondents (ad-blocker users and non-users).
- Adblock users admit there are obvious advantages to online advertising, such as providing information on topics of interest for a subject or regarding various promotions.
- Websites displaying ads with the highest perceived usefulness are the arts & culture, as well as education and professional training sites, with half of respondents deeming them useful.
- The runners-up are health and personal care websites (39.3% deem them useful), general news (37.6%), IT (36.3%), eCommerce (35.1%). Overall, adverts are deemed useful by three in ten respondents, on average.

77% of those who installed ad blockers did it all by themselves (especially men), and nearly 25% have installed them in the last six months.



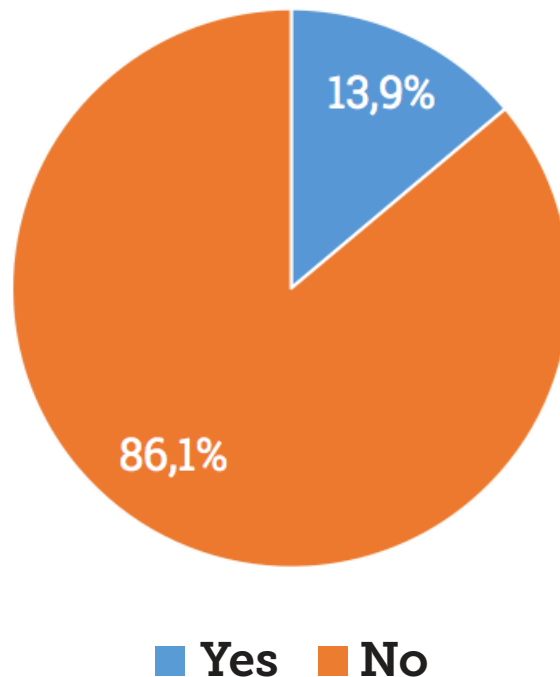
43.3%

of those who have not yet installed an **ad blocker** heard about ad blocking software and 18% of those who have not yet installed an ad blocker answered with "definitely yes" when asked whether they were planning to install an ad blocker in the next period.

How many Romanians use an ad blocker for online advertising?

According to the study carried out on 80 of most visited websites in Romania (according to the Internet Audience and Traffic Study (SATI)), which are coordinated in terms of content and/or advertising by seven of the leading publishers and media houses in Romania, members of the IAB, the exact percentage of people using ad-blocking software on the local mainstream websites accounts for 13.9% of total visitors.

Have you installed an ad blocker for online advertising?

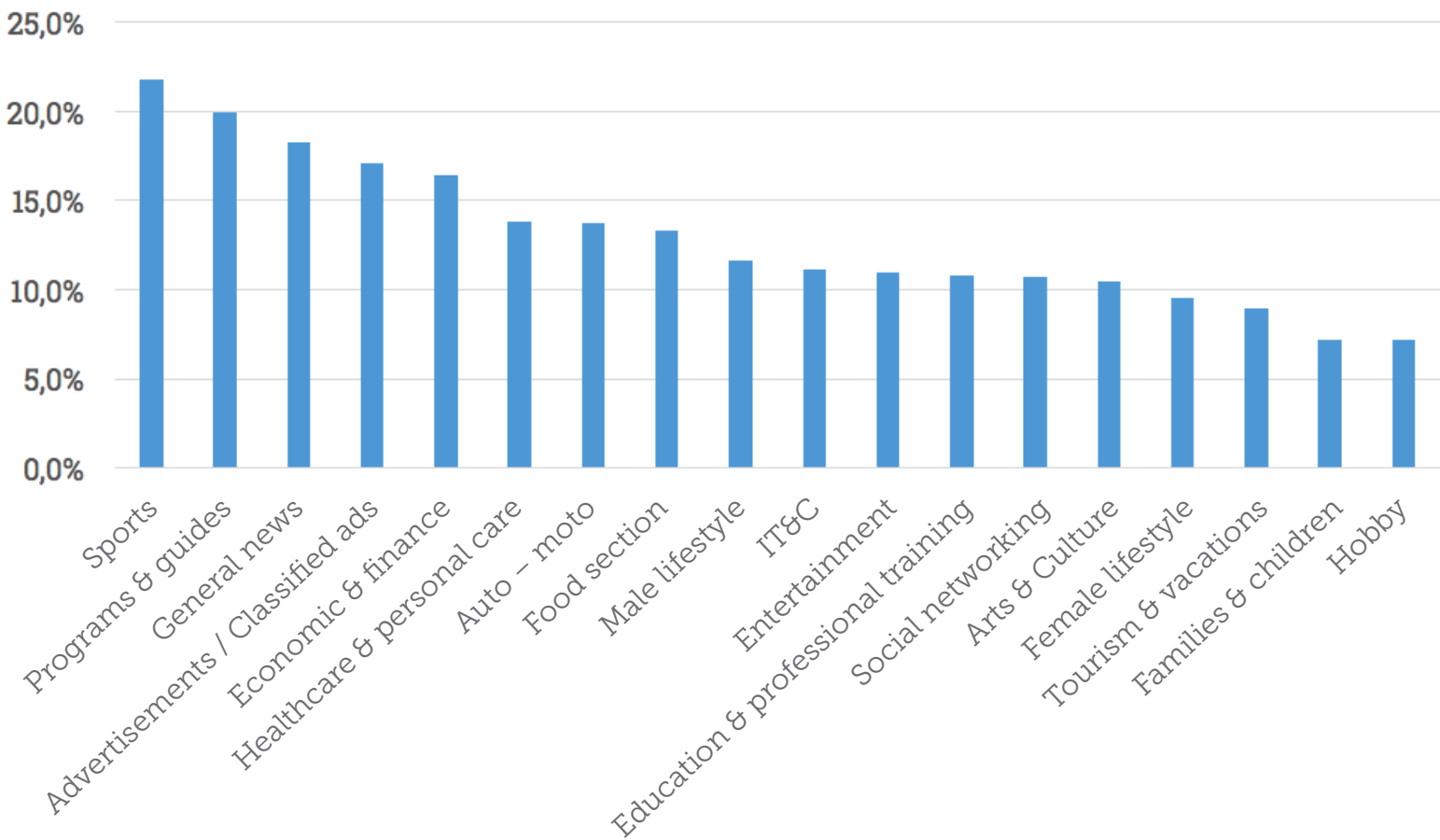


2.

Use of ad blockers for online advertising by website category

Websites having the highest percentage of ad blockers are included in the following categories: Sports (21.8% of visitors have ad blockers installed), Programs and guides (19.9%), General news (18.2%) and Economic & finance (16.4%), whereas the categories of Hobby & Families and Children register the lowest percentage of visitors blocking ads (7.2%)

Ad blocking rates by website category



3. Internet-related perceptions

Over half of the internet users accept internet advertising, mentioning that sometimes ads can be too aggressive. One in six internet users says that online advertising offers support in choosing products, brands or offers. The female segment registers a higher share of favorableness.

Respondents said they spent more time on the internet over the past year, coinciding with the evolution of the internet in Romania, both in the fixed and mobile networks.

The internet is considered as potentially dangerous for children. The concern over children's experience with the internet, in terms of volume and content, can impact parental control decisions, which include the use of an ad blocker.

Over the last 12 months, I spent more and more time on the internet



I accept online ads, but sometimes they are too aggressive



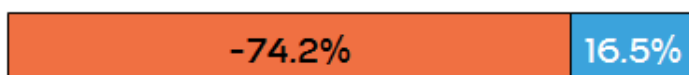
I believe the internet is dangerous for children



I keep myself up-to-date with the newest internet applications and programs



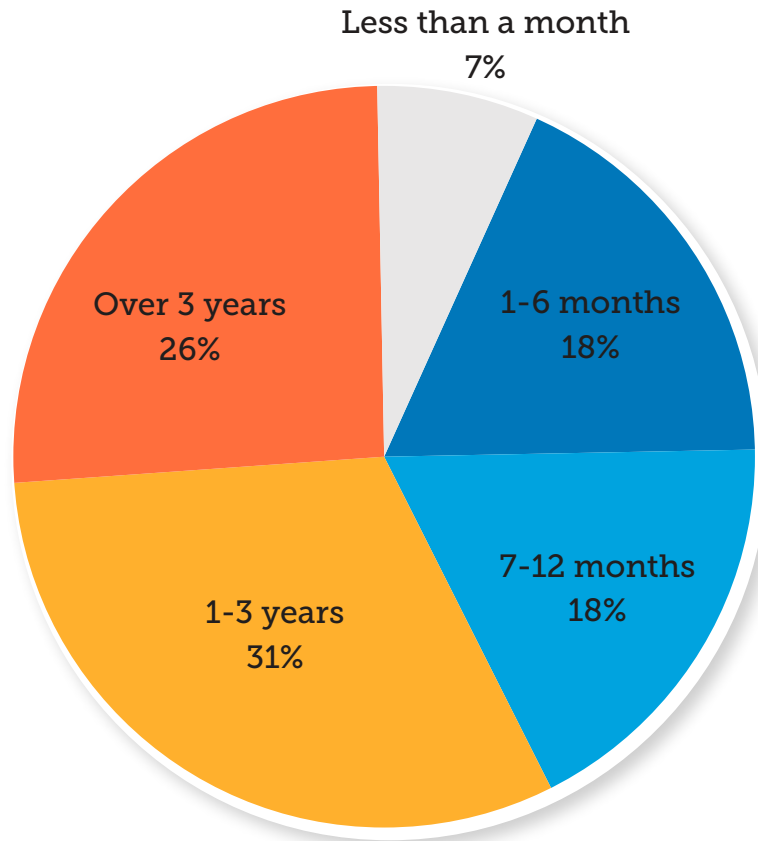
Internet ads help me choose products, brands or offers



■ Disagree ■ Agree

4.

How long have you been using the program to block ads on webpages (ad blockers)?



77% of the respondents have installed the ad blocker by themselves. Most of the respondents who have installed the program by themselves are young and preponderantly men.

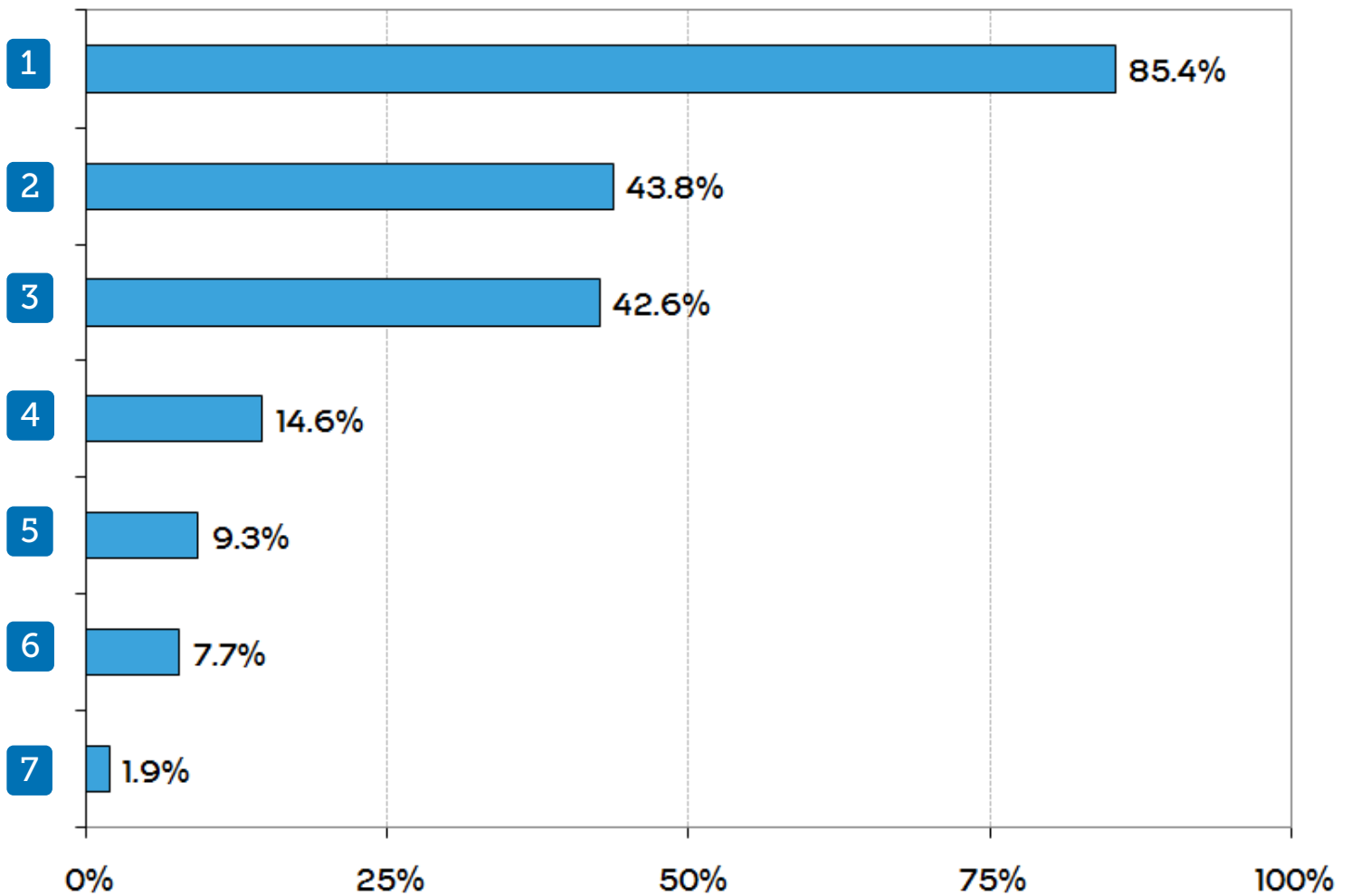
10% were helped by somebody else (friend/ relative).

96% say they will continue to use ad blockers in the future.

Male respondents say they have been using ad blockers for a longer period of time than female respondents.

5.

What are the main reasons for installing an ad blocker?



- 1 Ads on the webpages are annoying/ distressing
- 2 To optimize the loading of webpages
- 3 Generally, for a better web browsing experience
- 4 To limit internet bandwidth consumption
- 5 To protect children
- 6 Another reason
- 7 I don't know

What are the main reasons for installing an ad blocker?

The main reason why internet users install an ad blocker is that some ads can be annoying, rather than other reasons related to the optimization of the internet browsing. 85% of the respondents who are using ad blockers have mentioned this aspect.

96% of the respondents who are using ad blockers said they will continue to use them in the future.

What users say:

“ Excessive, aggressive ads which cannot be closed with one single click. ”

“ Due to annoying ads which appear suddenly and have a moving X or an x for closing which appears too late. An ad displayed conventionally on a web page is not annoying, but if a see a pop-up of that type, I close the webpage and leave the website. ”

“ Tired of thousands of aggressive ads, filling me with false/partially true information and hundreds of tricky websites asking me to fill in my personal data to get a prize. ”

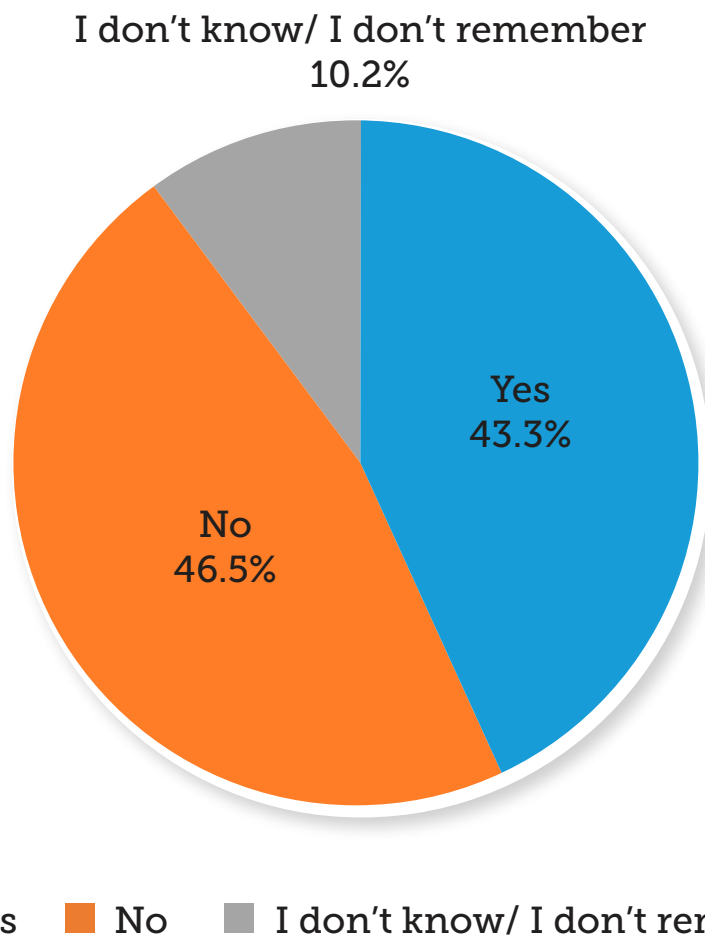
“ Without an ad blocker, the webpage is subject to an avalanche of ads, blocking everything and hindering web surfing. ”

“ To block aggressive ads, which – in certain cases – completely hinder the viewing of the webpage or are created in flash/java, blocking the PC due to the required processing resources. ”

6.

Have you ever heard of the possibility to install programs for blocking ads on webpages (ad blockers)?

Users aged over 55 know the least about the existence of programs for blocking ads on webpages.



43% of the respondents who haven't installed ad blockers know about their existence

Respondents who don't plan to install a program for blocking ads on webpages show a degree of acceptance for online advertising.

The main reasons why respondents have not installed ad blockers:

- the association of ads with sources of information (products, prices, novelty items)
- support for valued websites
- indifference, lack of a negative impact
- interest in ads and marketing

“ Ads sometimes direct me to products that I really need. ”

“ I am aware that ads help the owners of the websites that I use to get financial support. ”

“ I accept ads, but not the aggressive, repetitive ones, which force me to start over with the program. ”

“ Ads can keep me updated about sales or products that I could be interested in. ”

“ To keep me updated with the offers of brands that I am interested in, and to see how the brands choose to advertise through internet ads. ”

“ Because I am interested in ads for electrical and electronic products, transmissions and hobbies, as well as what's new in the technology sector. ”

7.

Do you plan to install an ad blocker program on your current computer in the next 3 months?

Nearly half of the respondents who don't use an ad blocker say they plan to install such an application in the next 3 months.

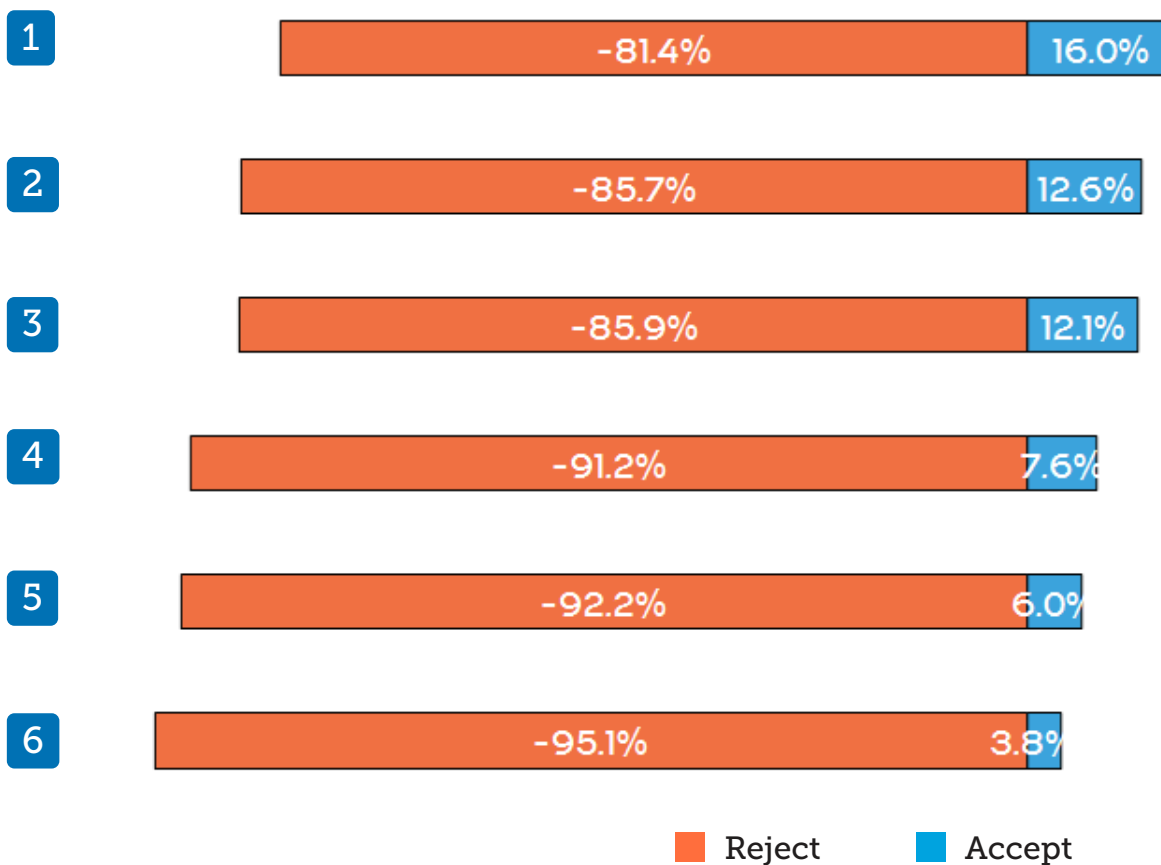
The main reason is the annoying nature of ads, which was mentioned by approximately 96% of the respondents who plan to install an ad blocker.



8.

How much are you attracted or annoyed by each of the following types of internet ads?

Overall, the level of rejection for the tested types of ads is rather high. In-stream videos can be largely impacted by Youtube experience. In this case, the "skip" option can represent a major indicator in assessing this type of ads.

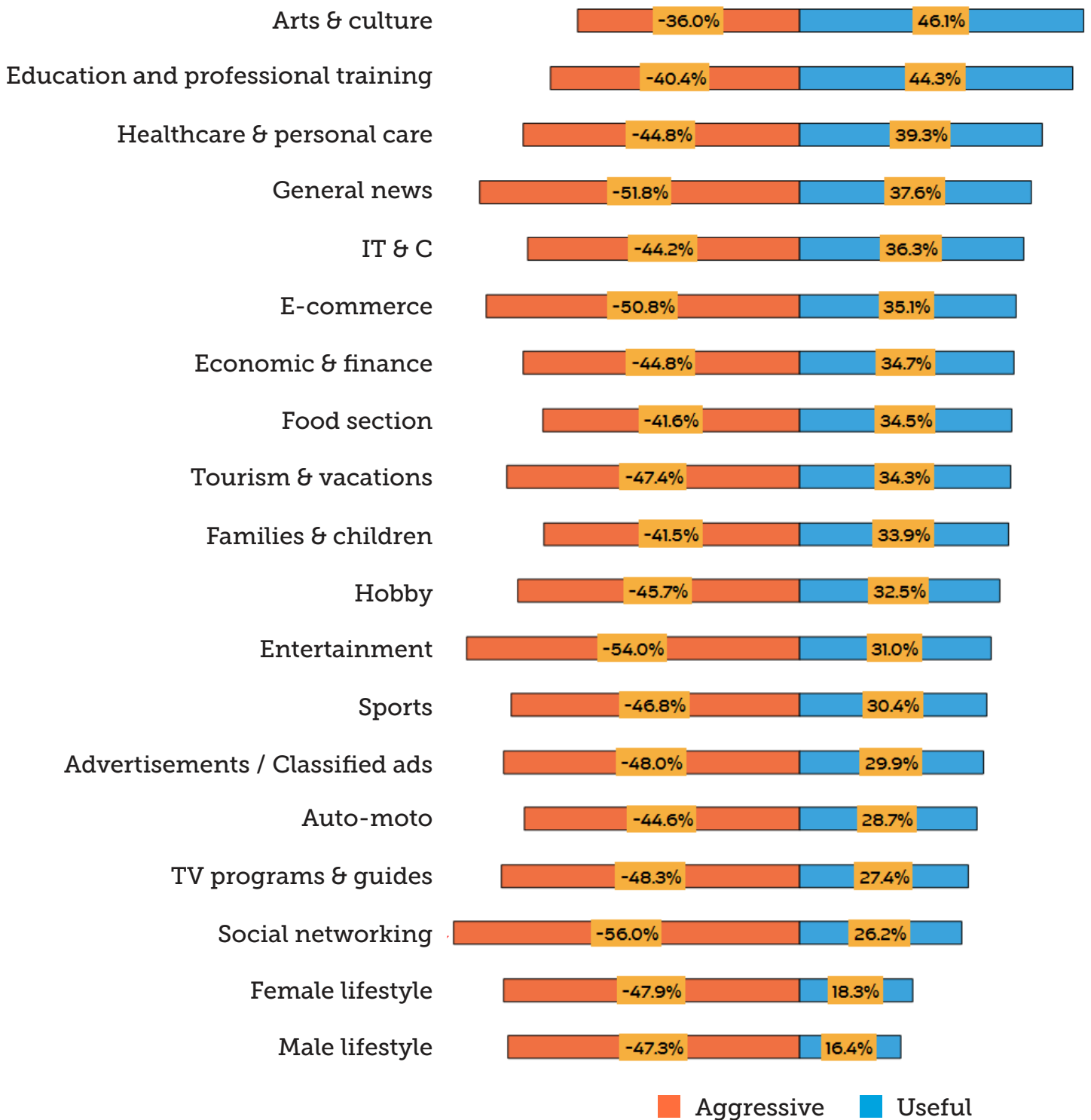


- 1 **IN-STREAM VIDEO** (video ads displayed in the player)
- 2 **RETARGETING** (ads displayed repeatedly on multiple websites)
- 3 **INTERSTITIAL ADS** (ads displayed when changing webpages)
- 4 **EXPANDABLE ADS** (ads starting from a fixed position and partially covering the webpage content)
- 5 **AUTO-PLAY ADS WITH SOUND** (ads whose sound starts automatically)
- 6 **FLOATING ADS** (ads which cover the webpage content)

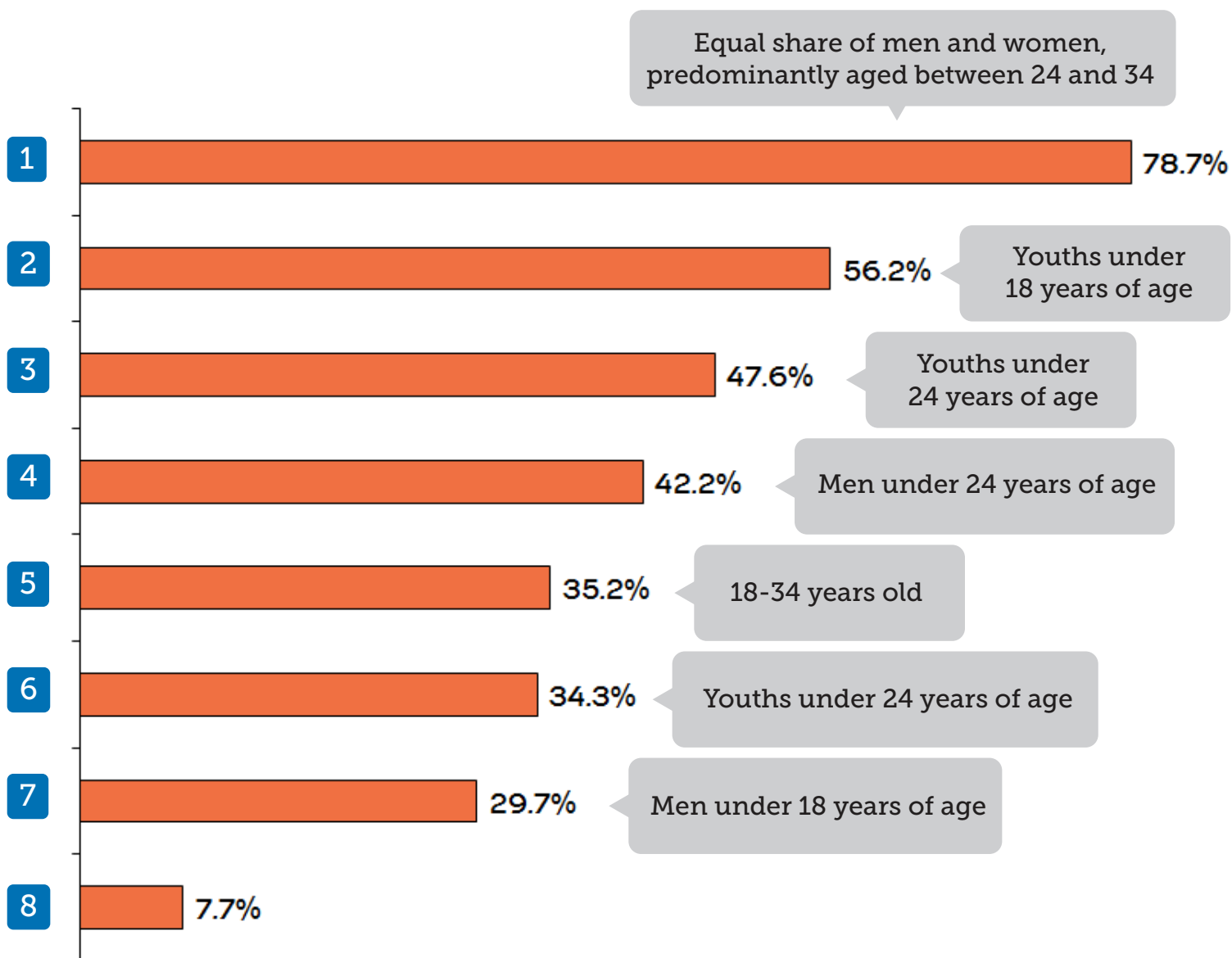
9.

How do you evaluate ads on the following types of websites?

The most useful ads are considered to be those on arts and culture websites or education and professional training websites. Ads on lifestyle websites stand at the opposite pole.

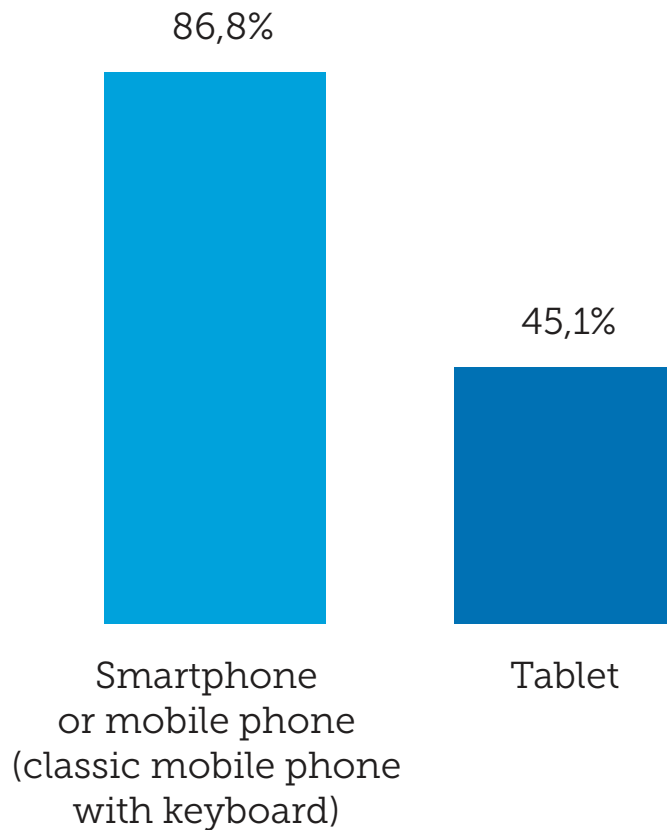


What types of online activities do you consider to be affected by internet advertising?



- 1 Reading news
- 2 Watching movies
- 3 Listening to music
- 4 Social media
- 5 Buying goods/services online
- 6 Online games
- 7 Chatting with friends
- 8 Other activities

Usage rates for mobile phones and tablets



› **84%** of mobile phone owners use it to access the internet, **65%** both via WiFi and mobile data.

› **Most downloaded applications:**

- › Business and productivity (mail, calendar, office, etc.) **57%**
- › Audio / Video on demand (Youtube, Voyo, Zonga, Deezer, Soundcloud etc.) **57%**
- › Social Media (Facebook, Twitter, Pinterest etc.) **56%**
- › Browsing the internet **51%**

Base: mobile phone users

› **93%** of tablet owners access the internet on this device, **50%** only via WiFi.

› **Most downloaded applications:**

- › Audio / Video on demand (Youtube, Voyo, Zonga, Deezer, Soundcloud etc.) **67%**
- › Social Media (Facebook, Twitter, Pinterest etc.) **61%**
- › Business and productivity (mail, calendar, office etc.) **60%**
- › Browsing the internet **56%**

Base: tablet users

Methodology and authors

The study on the use of ad-blocking software in Romania 2016 is a quantitative research based on a statistical survey, which was conducted by IAB Romania and Project Agora, with support from PageFair and Quantix, on a final sample of 1303 respondents.

Data was collected between November 26, 2015 and January 21, 2016, and the target population consisted of Internet users- visitors of one of 80 websites with the highest traffic in Romania (according to SATI data), which are coordinated in terms of content and/or advertising by seven of the leading publishers and media houses in Romania, members of IAB Romania.

The study has a statistical margin of error of +/- 2.6% (confidence interval p=95%).

Considering that ad-blockers had a slight impact on mobile devices when the study set off, they were not considered in this stage of the study, and mobile browsers will be included in future research as well.

About IAB Romania

IAB Romania (Interactive Advertising Bureau Romania) is the association of the marketing and interactive advertising industry in Romania and the founding member of the IAB Europe network (www.iabeurope.eu), in 2008. Founded in 2006, it brings together the leading advertising agencies, media houses, local publishers and companies providing services tailored for the interactive advertising industry – online, mobile and other interactive channels.

IAB Romania is a non-profit, non-governmental, apolitical and autonomous professional association, whose purpose is to protect and promote the professional interests and the investments made into the interactive advertising market in Romania, elaborate standards in the industry, create and maintain an optimal framework for self-regulation and to coordinate industry efforts for the purpose of market growth.

Methodology and authors

About Project Agora

Project Agora is the largest programmatic advertising marketplace for online publishers in Central and Eastern Europe, as well as in the Middle East and North Africa (MENA) region. It is developed and implemented by **Tailwind EMEA** (part of the **TDG group**) in Greece, Romania, Hungary and the United Arab Emirates, in partnership with **AppNexus** and with over 50 of the leading publishers and networks (media houses) in the region.

About Quantix Marketing Consulting

Quantix Marketing Consulting is a company specialized in strategic marketing consulting and market research, with a vast experience in studies in the telecom sector.

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