

Online trends from CEE region

Lauris Lietavietis

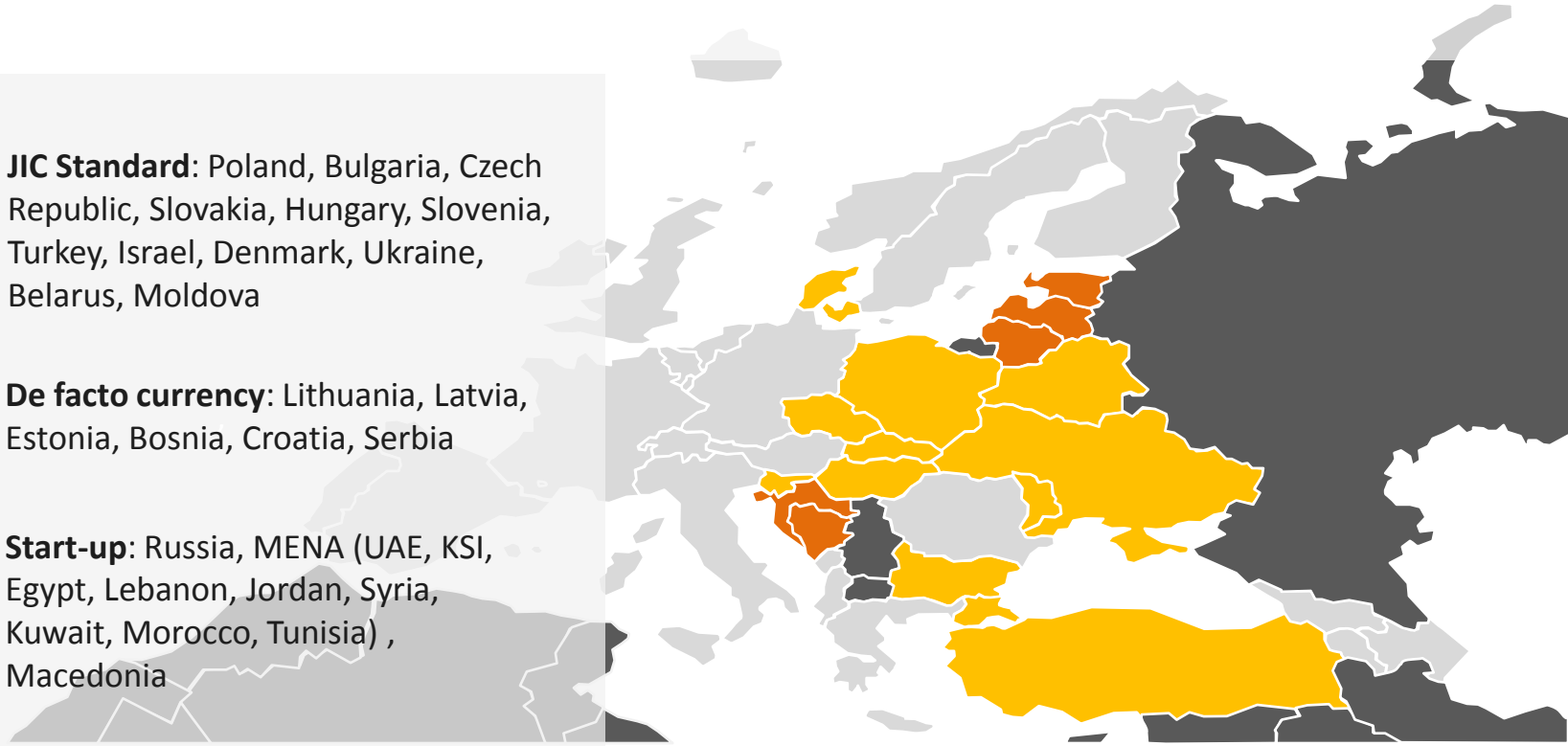
Filip Pieczynski

18.04.2012

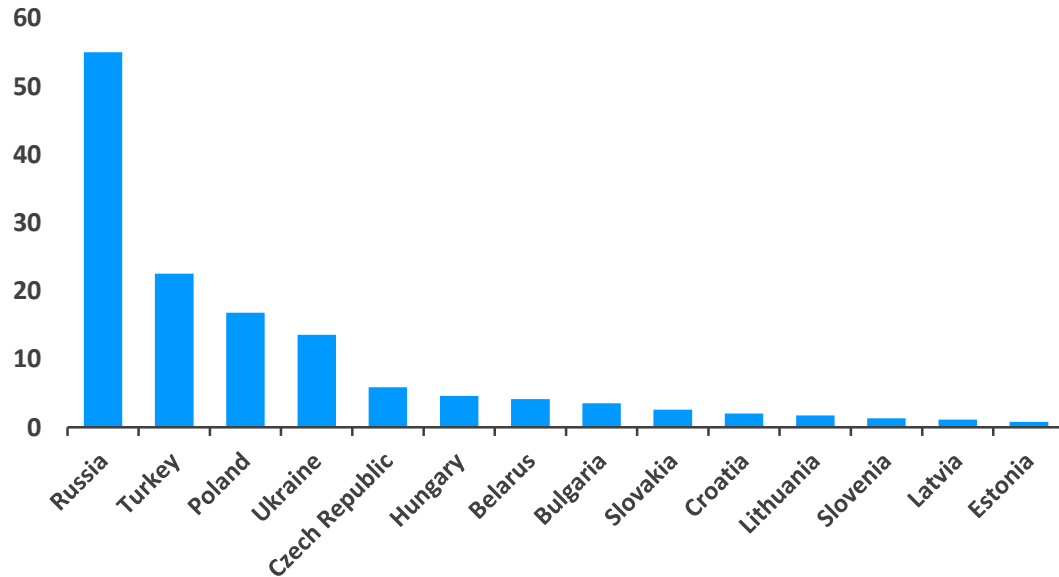


Online audience measurement

-  **JIC Standard:** Poland, Bulgaria, Czech Republic, Slovakia, Hungary, Slovenia, Turkey, Israel, Denmark, Ukraine, Belarus, Moldova
-  **De facto currency:** Lithuania, Latvia, Estonia, Bosnia, Croatia, Serbia
-  **Start-up:** Russia, MENA (UAE, KSI, Egypt, Lebanon, Jordan, Syria, Kuwait, Morocco, Tunisia) , Macedonia



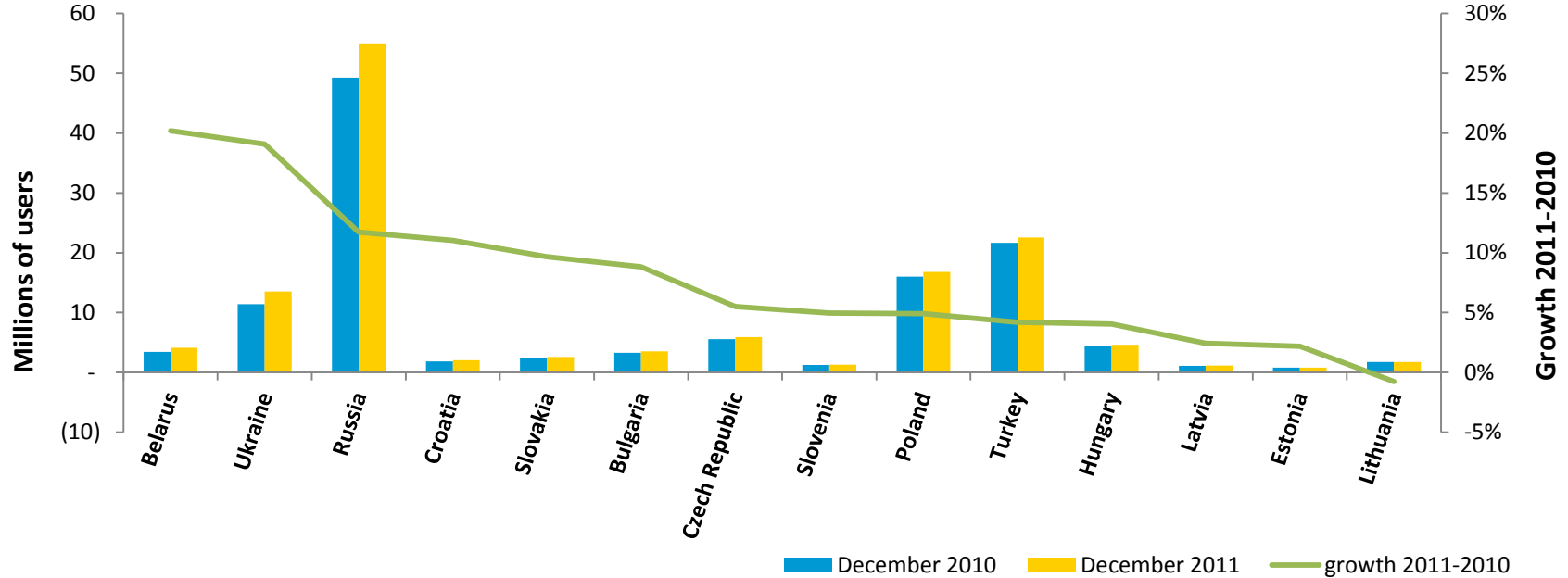
Internet Population (millions of internet users / Dec 2011)



- **The whole CEE region = 136m internet users + 11.6m new IU in 2011!**
- 40% of the online population out of 15 markets lives in Russia
- CE constitutes 22%
- Big potential of Turkey with 22.5m IU (17%)

Source of data: Ukraine: gemiusAudience; Hungary: gemius/Ipsos Fusion Data; Latvia: gemiusAudience; Belarus: gemiusAudience; Turkey: gemiusAudience; Czech Republic: NetMonitor - SPIR - Mediaresearch & Gemius; Romania: Mercury Research; Slovakia: AIMonitor - AIM - Mediaresearch & Gemius; Bulgaria: gemiusAudience (data collected using Synovate research); Poland: Megapanel PBI/Gemius; Slovenia: gemiusAudience; Russia: Gemius estimation based on FOM statistics/gemiusAudience Data; Estonia: gemiusAudience (data collected using TURU-UURINGUTE AS research), Lithuania: gemiusAudience; Croatia: gemiusAudience [age groups - CEE: 15+; Russia: 18+; Romania: 14-64; Lithuania: 15-74]

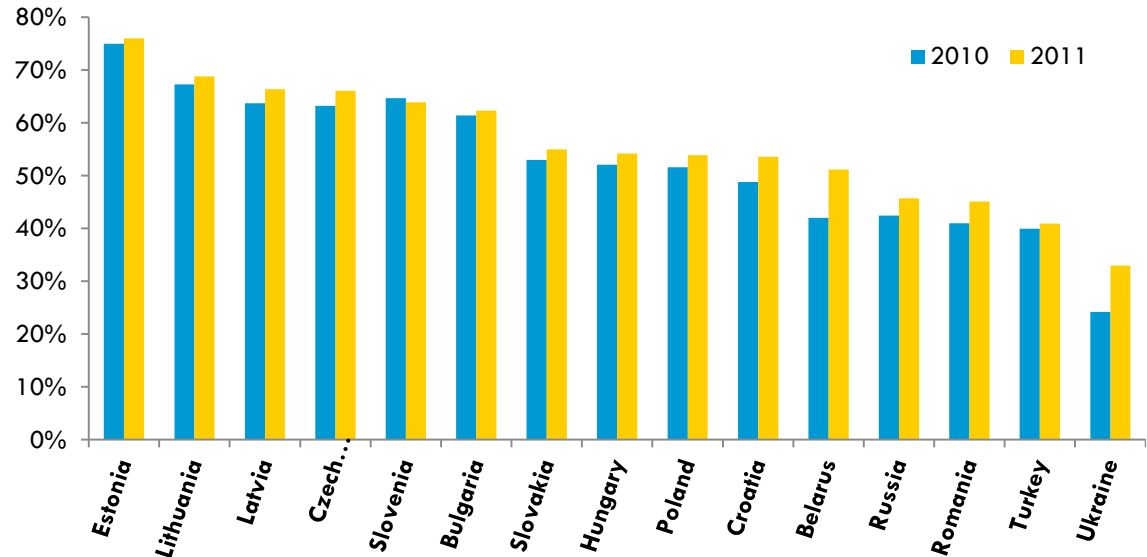
Internet Population Growth (m of IU, Dec 2010/Dec 2011)



Source of data: Ukraine: gemiusAudience; Hungary: gemius/Ipsos Fusion Data; Latvia: gemiusAudience; Belarus: gemiusAudience; Turkey: gemiusAudience; Czech Republic: NetMonitor - SPIR - Mediaresearch & Gemius; Romania: Mercury Research; Slovakia: AIMonitor - AIM - Mediaresearch & Gemius; Bulgaria: gemiusAudience (data collected using Synovate research); Poland: Megapanel PBI/Gemius; Slovenia: gemiusAudience; Russia: Gemius estimation based on FOM statistics/gemiusAudience Data; Estonia: gemiusAudience (data collected using TURU-UURINGUTE AS research), Lithuania: gemiusAudience; Croatia: gemiusAudience [age groups - CEE: 15+; Russia: 18+; Romania: 14-64; Lithuania: 15-74]

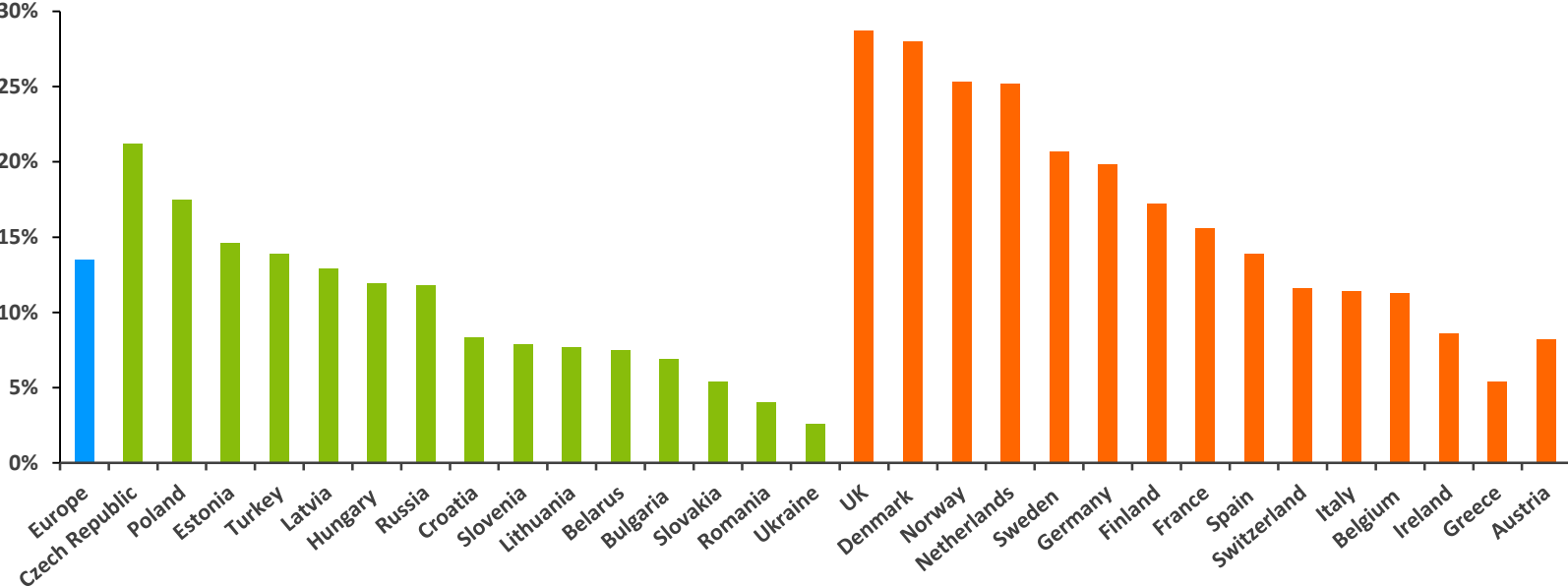
Internet Penetration (2010-2011 change)

- Highest penetration in Baltic States (66-76%), still far from WE e.g. Denmark (87%)
- Moscow has penetration comparable with western Europe – over 80%
- Greatest improvements in:
 - Ukraine - 36% (9 pp)
 - Belarus - 22% (9 pp)
 - Romania - 10% (4 pp)



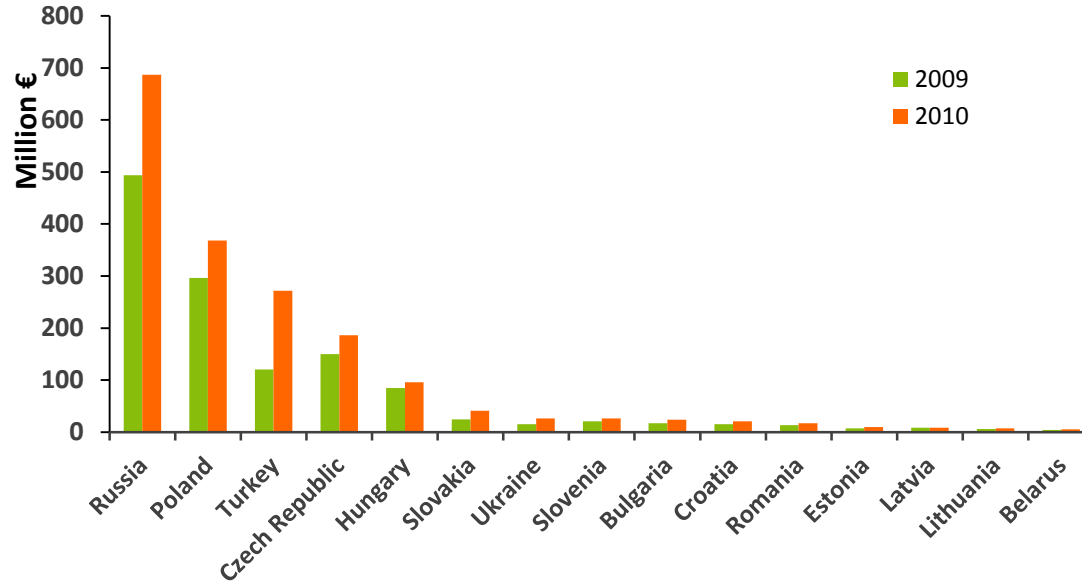
Source: of data Estonia: Turu-uuringute AS; Lithuania: SKDS; Czech Republic: Mediaresearch; Latvia: RAIT; Slovenia: Valicon; Bulgaria: Synovate; Slovakia: Mediaresearch; Hungary: gemius/Ipsos Fusion Data; Poland: Megapanel PBI/Gemius & netTrack Millward Brown; Croatia: Valicon; Belarus: Factum Bel; Russia: FOM; Turkey: Ipsos KMG - Gemius SA: Internet Audience Measurement, 2011-12; Ukraine: gfk, [age groups - CEE:15+; Lithuania: 15-74; Bulgaria: 15-69; Slovakia: 14+; Croatia: 12+; Belarus: 16+; Russia 18+; Romania: 14-64; Ukraine: 14+]

Online adspends as a share of total



Source of data: IAB Europe/IHS Screen Digest/Warc, Ukrainian Advertisement Coalition, TNS LT, 2010

Online adspends (m €/ 2009-2010 change)



- **Russians, Poles and Czechs** spend the biggest amount of money on internet advertising
- **Slovakia** opens the group of small markets
- Huge potential of **Turkish market**

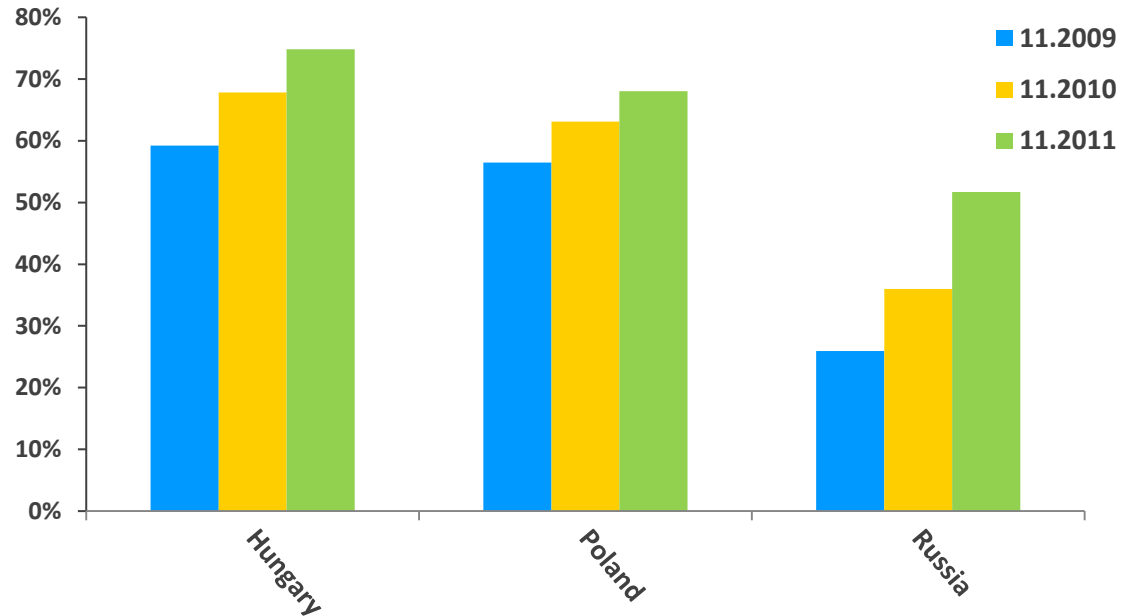
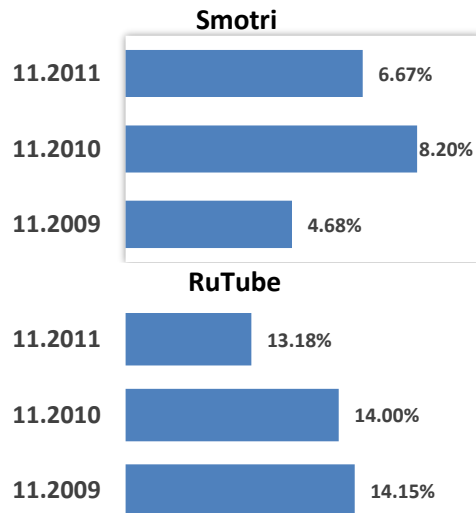
2012 certainly will be a year of interactive TV and VOD services (...). Launching video and audio stream measurement will help to convince advertisers to use such channels for marketing activities.

Andrzej Garapich
President of PBI (Polish Internet Studies)



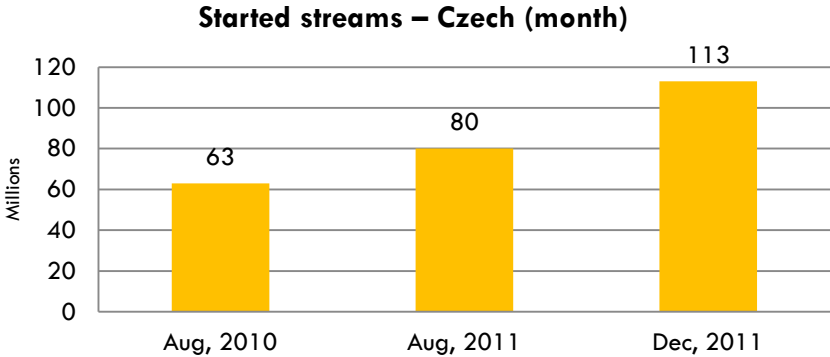
Video content as the most popular form of e-entertainment – case of YouTube

- Reaching almost **75% of internet users in Hungary** and **70% in Poland** (Dec 2011)
- **Russia - a leader in the number of visitors to YouTube** – almost 22m Real Users in December 2011!

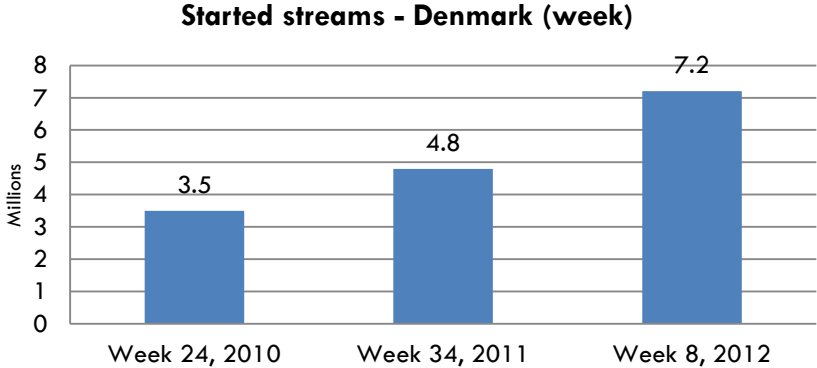


Source: of data Megapanel PBI/Gemius, gemiusAudience, gemius/Ipsos Audience Fusion

Increase in viewing of the video content



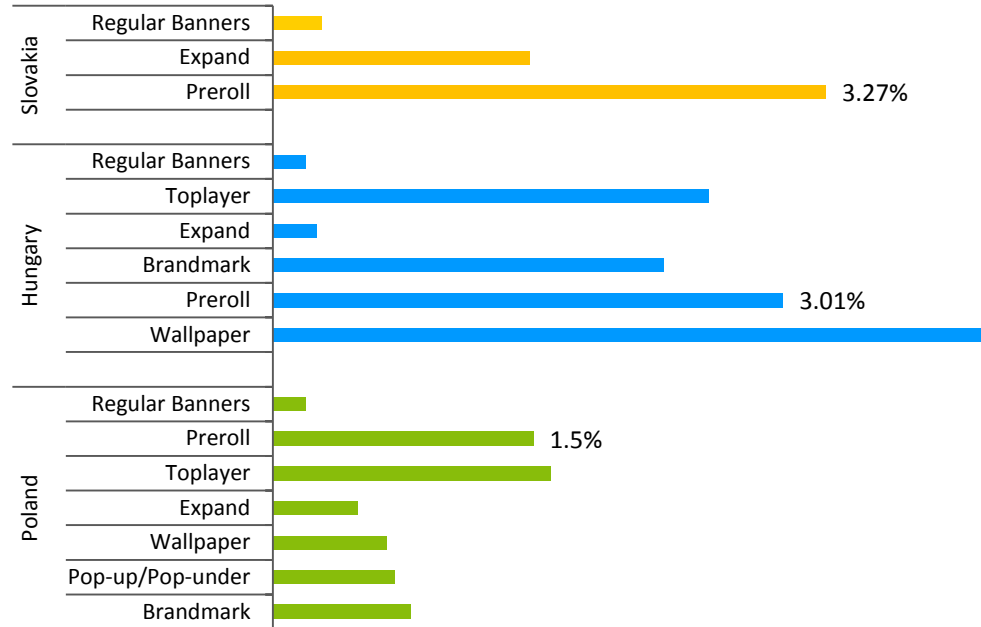
Growth is **significant**
and it is **accelerating**



Source: of data: geniusStream

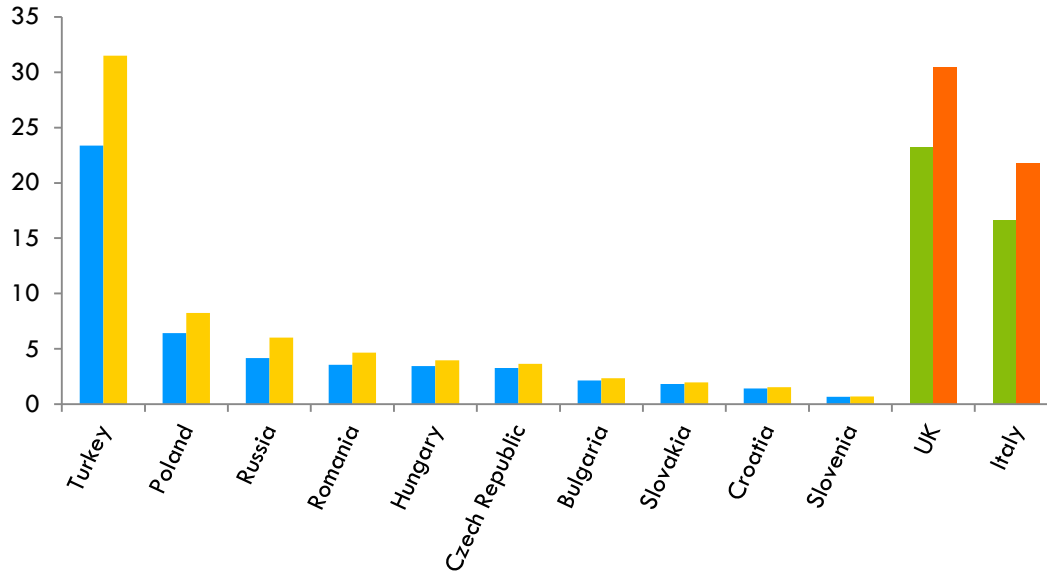
Average Click-Through rates in CE

- **In-stream ad formats** also **prove to be** one of the most **effective** in terms of CTR
- Still rich-media and video ads constitute not more than 20% of regular internet budgets in CEE



Source: of data: gemiusDirectEffect, 2011

Facebook domination and growth of user data base (April 2011/Feb 2012)



- Turkey is **the largest market for Facebook in Europe** (31.5m)
- **Almost 18m Facebook users in CE**
- Russia – Facebook users' base grew 44% during last 10 months

The reason why none of the foreign social media players achieved any astounding results in Runet yet is the fact of a better understating of local needs by the domestic players.

Nadir Khabdulin, PR Manager at
Odnoklassniki.ru



Some CEE social networks still attract local audiences

Nk.pl (Nasza Klasa)

- Less than 1,3m Real Users less than FB in Poland (Dec 2011)
- Attracts different audiences than FB
- Available on mobile and via apps, incl. popular gaming services
- Additional revenue in research

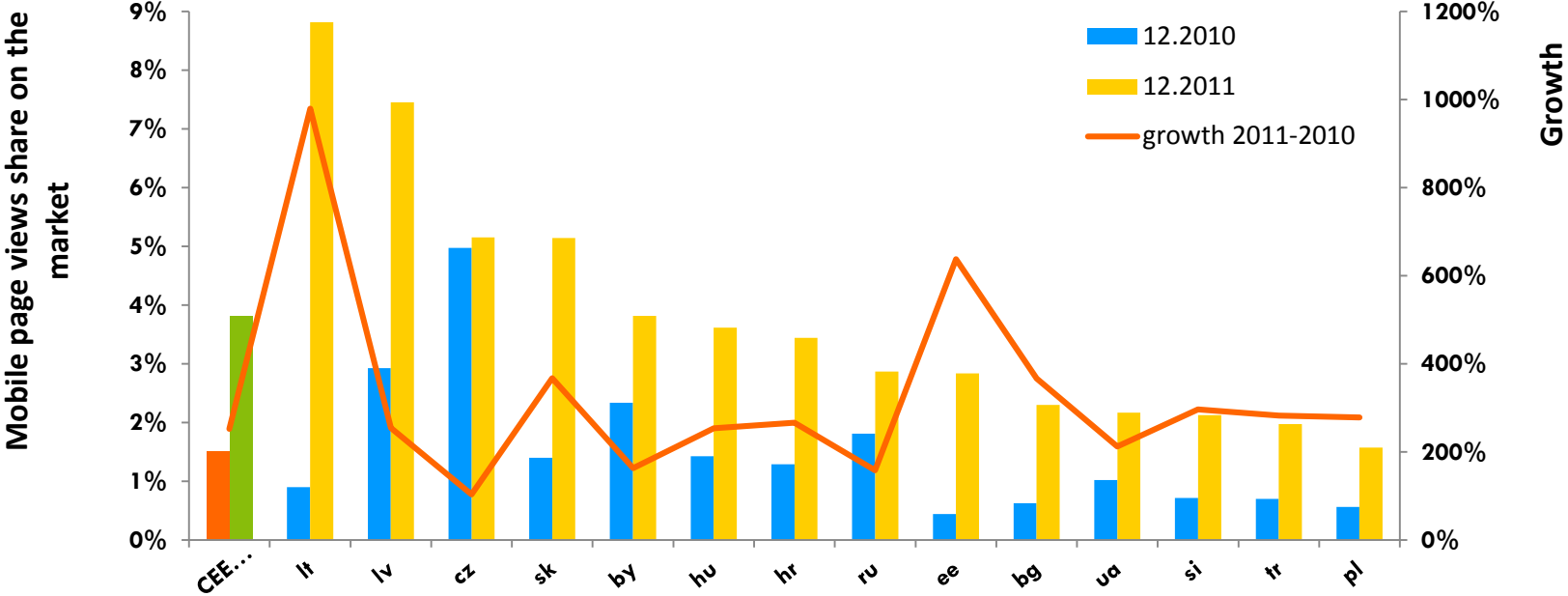
Vk.ru and Odnoklassniki

- ~ 20 billion page views monthly, leaving FB far behind (600m).
- The Russians interact, share, chat and play using domestic networks.
- One investor: Mail.ru Group.

Draugiem.lv

- Online phenomenon – more popular than FB on a small market
- Latvians spent there on av. 22h/month!
- Constantly expanding its services
 - Group shopping
 - Group watching
 - Available on mobile and TV sets via application

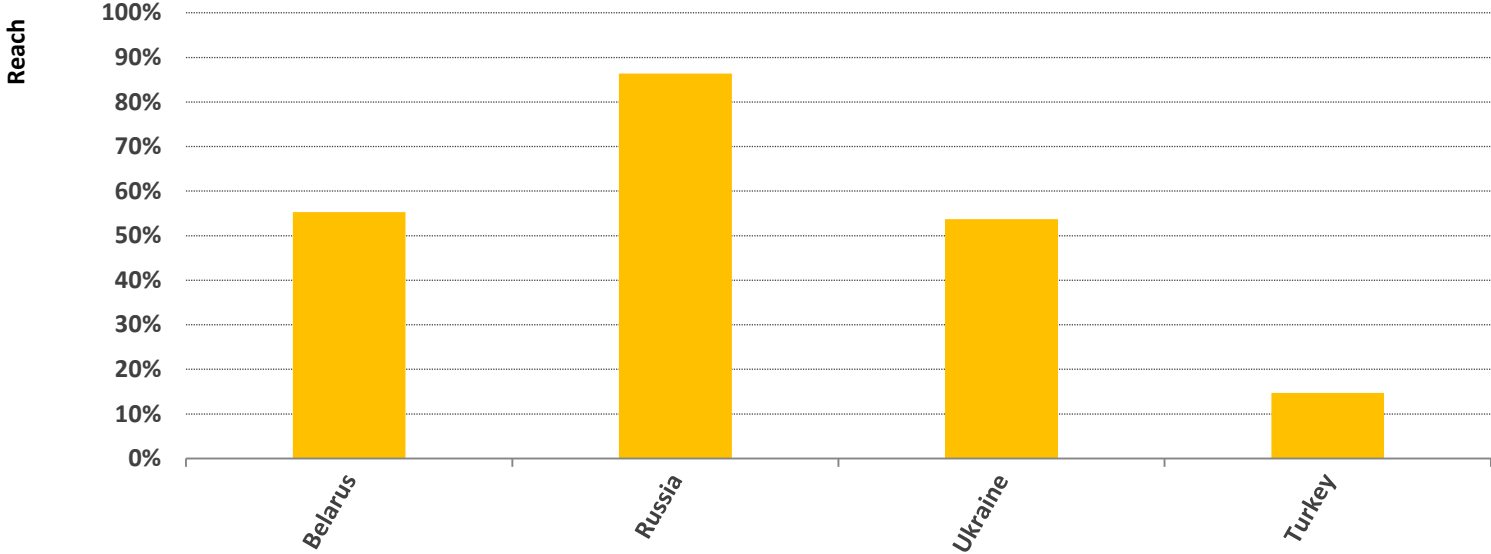
Mobile internet traffic increases significantly



Source of data: gemiusTraffic

Yandex attacks Turkey

Yandex – getting to the new markets



Source of data: gemiusAudience (02.2012);

Who is about news and no entertainment

Ukraine		
mail.ru	62,02%	horizontal portal
yandex.ua	54,34%	more than search
odnoklassniki.ua	33,34%	social network
i.ua	22,10%	horizontal portal
marketgid.com	20,49%	directory
meta.ua	18,43%	horizontal portal
gismeteo.ua	18,19%	thematic site
online.ua	16,31%	horizontal portal
livejournal.com	15,94%	blog site
prom.ua	15,57%	directory
Belarus		
mail.ru	63,70%	horizontal portal
yandex.by	55,99%	more than search
odnoklassniki.ru	34,37%	social network
onliner.by	24,42%	thematic portal
livejournal_by	17,40%	blog site
deal.by	13,77%	directory
abw.by	13,38%	thematic portal
av.by	11,06%	thematic portal
by.all.biz	11,06%	directory
rambler.ru	10,81%	horizontal portal

- Low on social
- High on horizontal portals
- No video sites in top 10
- Gismeteo in top 10 in UA - Do they have hurricanes or earthquakes?
- Russian players dominating markets stronger and stronger

Who is about entertainment but do not care what is going on in the world

Hungary		
google.hu	93,27%	search engine
facebook.com	81,94%	social network
youtube.com	76,80%	video content platform
blog.hu	50,14%	blog platform
blogspot.com	44,38%	blog platform
origo.hu	44,24%	horizontal portal
startlap.hu	43,96%	link aggregator
hu.wikipedia.org	42,73%	online encyclopediae
iwiw.hu	39,07%	social network
freemail.hu	36,49%	mail platform
Turkey		
google.com	93,42%	search engine
facebook.com	89,67%	social network
youtube.com	60,62%	video content platform
live.com	59,70%	mail platform
msn.com	39,90%	horizontal portal
meb.gov.tr	39,12%	governemental platform
mynet.com	38,61%	horizontal portal
twitter.com	30,81%	social network
blogcu.com	30,55%	social network
milliyet.com.tr	28,28%	news portal

- High on social and blogging
- Low on horizontal and news portals
- Video site very high
- International players on very strong positions
- What government says in Turkey is crucial 😊

Who is the most similar to Russians ...

Russia	
Yandex	87,21% more than search
Mail.ru	86,53% horizontal portal
vk.com	69,84% social network
Google	67,49% search engine
odnoklassniki.ru	63,56% social network
YouTube	53,39% video content platform
wikipedia.org	43,53% online encyclopaedia
facebook.com	35,81% social network
biglion.ru	32,76% collective shopping
avito.ru	29,43% classified ads
Poland	
google.pl	87,16% search engine
youtube.com	68,79% video content site
facebook.com	66,09% social network
onet.pl	65,07% horizontal portal
google.com	64,63% search engine
nk.pl	58,66% social network
wp.pl	57,79% horizontal portal
allegro.pl	55,95% e-commerce platform
wikipedia.org	50,07% online encyclopedia
gazeta.pl	45,75% horizontal portal

- High on horizontal portals
- High on social networking
- High on video
- High on e-commerce
- Well protected local markets
- And being smarter by reading online encyclopedia 😊

Thank you!
Questions?

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