

Let's make some money online

A few words about the
blooming internet market in
Serbia

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Gemius SA

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About Gemius


- a **global company** and the **no. 1 choice in EMEA**, provides consultancy and expertise on consumer behaviour in the digital world
- **‘one stop shop’** for everyone who needs to **measure a website**, plan and deliver effective **online campaigns** or use the **internet as a communication channel**





The story is...

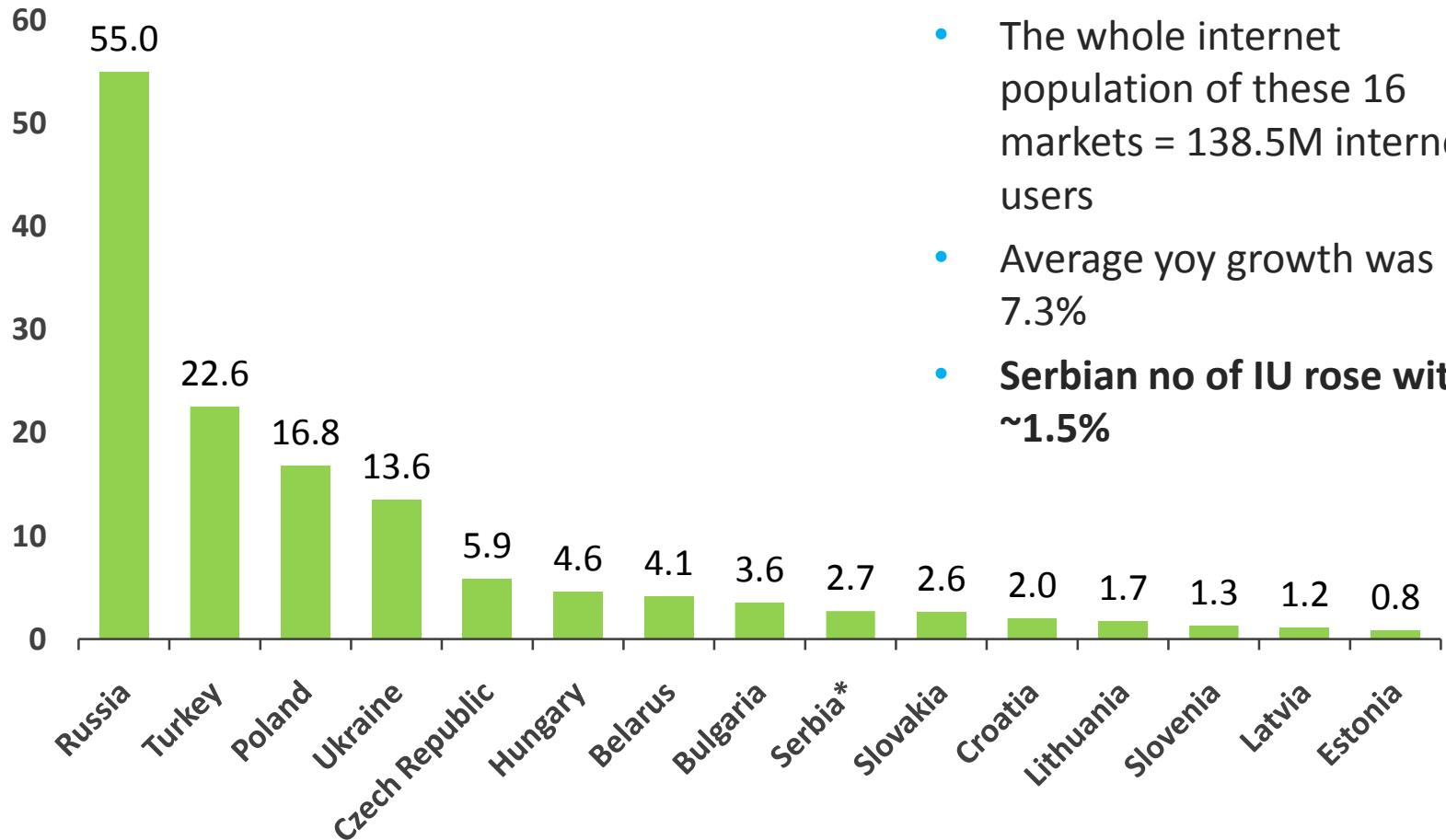
- **Regional overview of the internet landscape**
- **Is Croatian story relevant for Serbia?**
- **Who is Serbian internet user?**



Gemius has witnessed the fascinating growth of the internet in Central, Eastern and Southern Europe, its advancing popularity, the way it responded to the needs that emerged with the development of the online world and the new questions it's posing.

Filip Pieczynski
V-ce President Gemius SA

Internet population in the CEE (millions of IU / 2011)

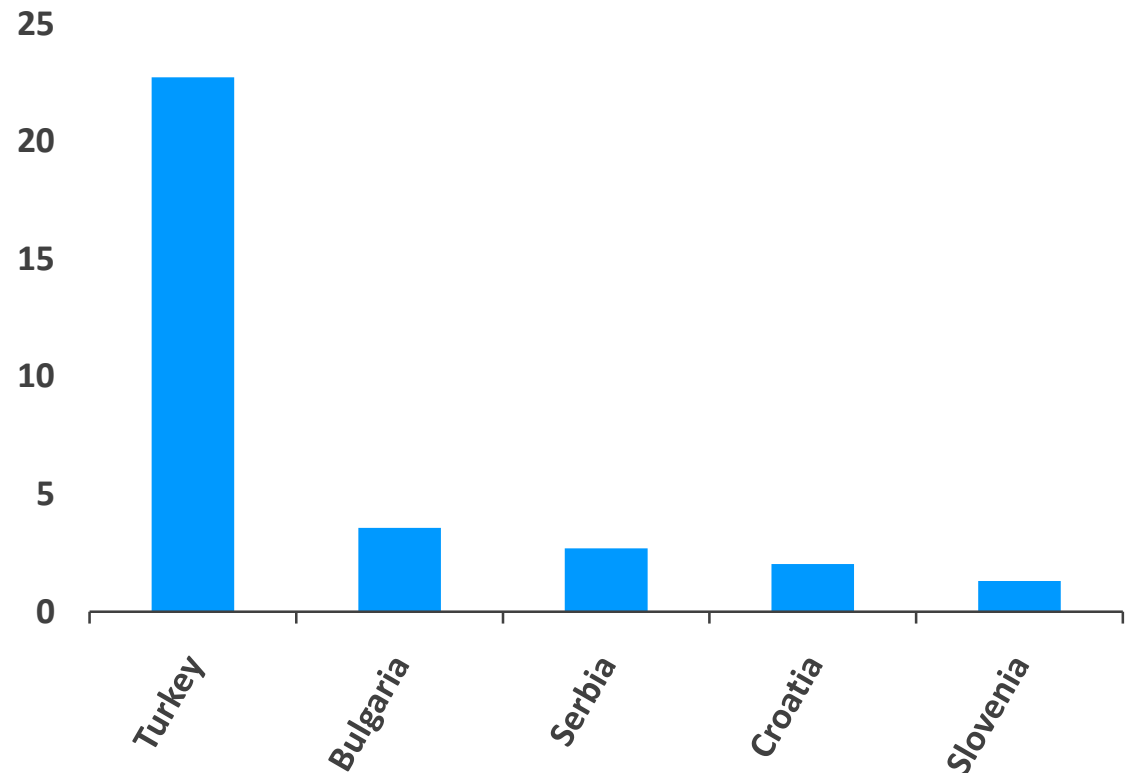


- The whole internet population of these 16 markets = 138.5M internet users
- Average yoy growth was 7.3%
- **Serbian no of IU rose with ~1.5%**

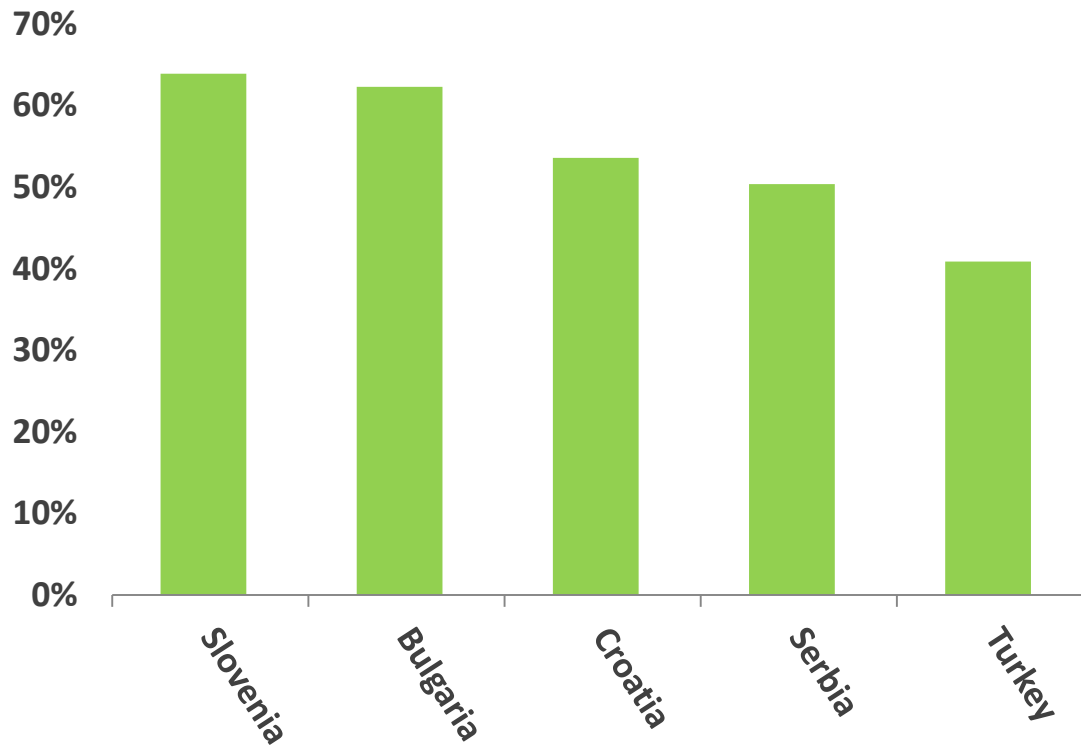
source of data: Ukraine: gemiusAudience; Hungary: gemius/Ipsos Fusion Data; Latvia: gemiusAudience; Belarus: gemiusAudience; Turkey: gemiusAudience; Czech Republic: NetMonitor - SPIR - Mediaresearch & Gemius; Romania: Mercury Research; Slovakia: AIMonitor - AIM - Mediaresearch & Gemius; Bulgaria: gemiusAudience (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, Serbia Gfk [age groups - CEE: 15+; Russia: 18+; Romania: 14-64; Lithuania: 15-74]

Internet population in the region (millions of IU / Feb 2012)

- The whole of Southern and Eastern Europe = 32.3M internet users
- 70% of the online population out of 5 markets lives in Turkey
- **Serbia with 2.7M users constitutes 8%**



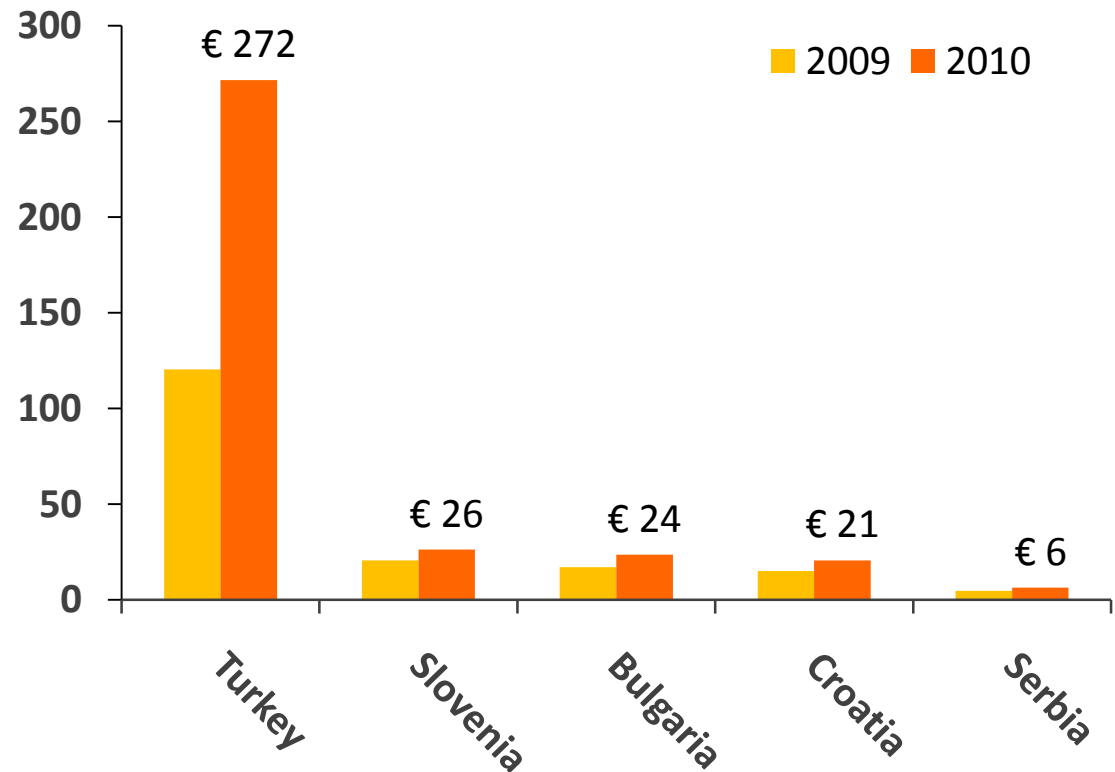
Internet penetration in the region (% of total population using internet / Feb 2012)



- Slovenia leads in the region
- **Serbia has 10pp higher internet penetration than Turkey - 50.4%**
- Average in CEE is ~55%

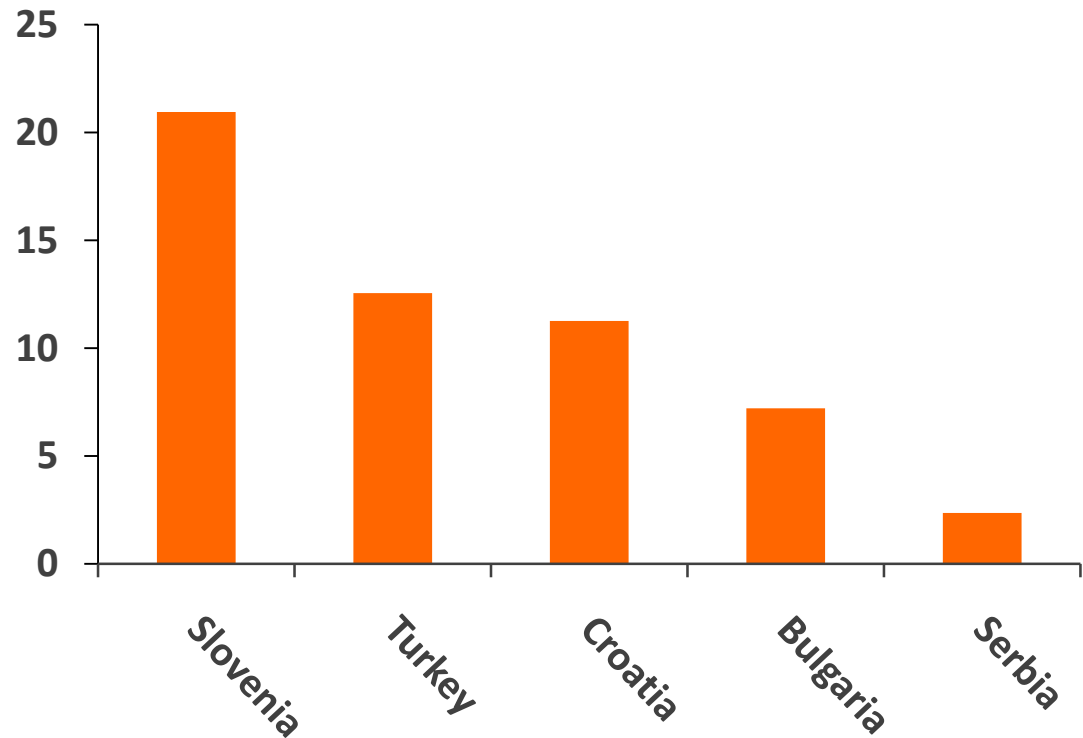
Internet adspends in the region (in million Euro, 2009-2010)

- Next to huge Turkish market no one looks good ;)
- **Serbian internet adspends grew with 35%**
- **2011 est.:**
 - display 6.4M EUR
 - Google&FB 1.75M EUR



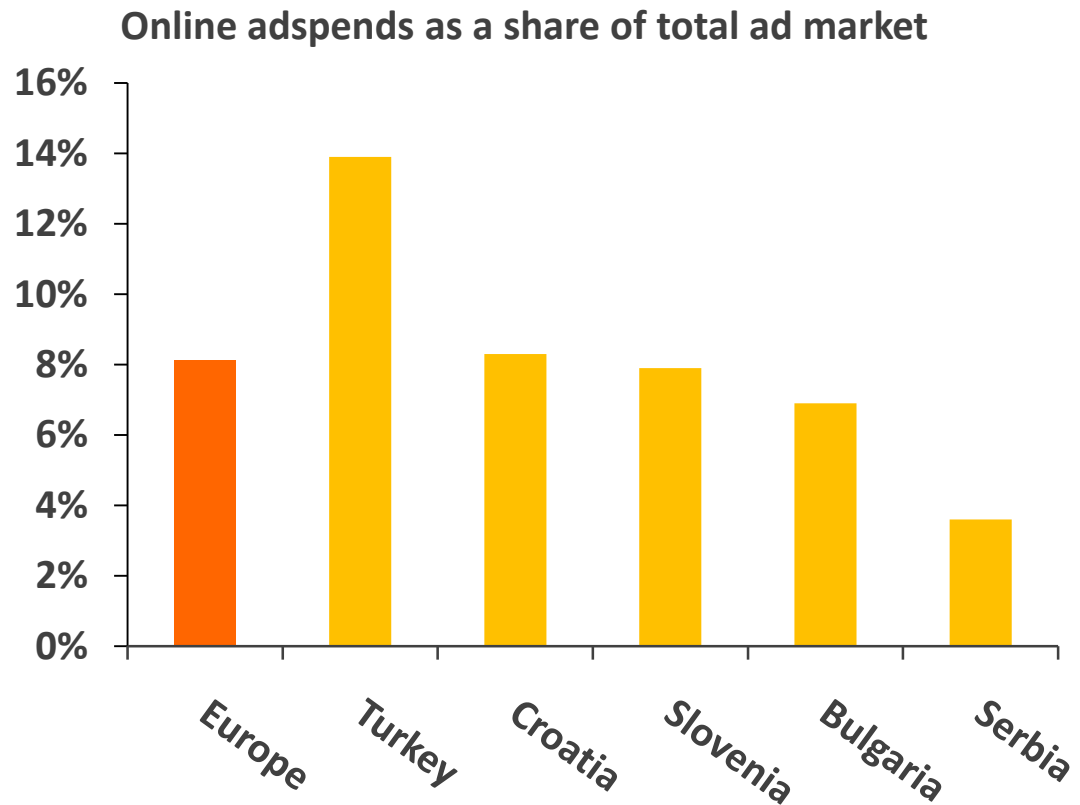
Online adspends per internet user (in €, 2010)

- Small Slovenia beats Turkey with almost double adspends per user
- Serbia noted ~2.4€/user in 2010
- It is more than in Ukraine, Romania or Belarus



Growing importance of online advertisement

- The online adspends' share in total oscillates around European average in 3 out of 5 countries
- **Serbia – 3.6%**



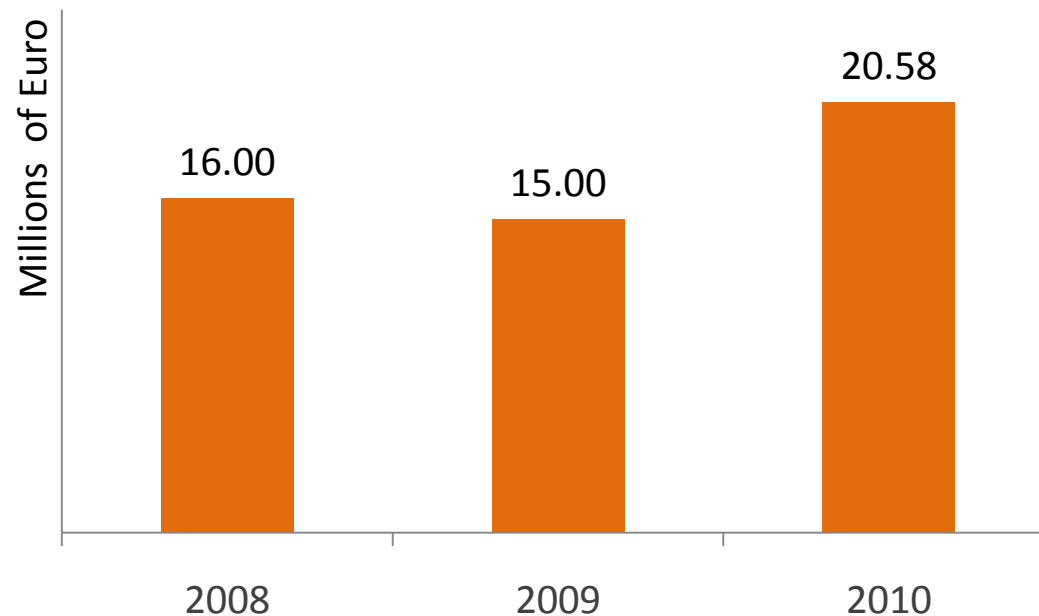


Humble beginnings

The case of Croatia compared to present state of affairs in Serbia

There is money in online advertising

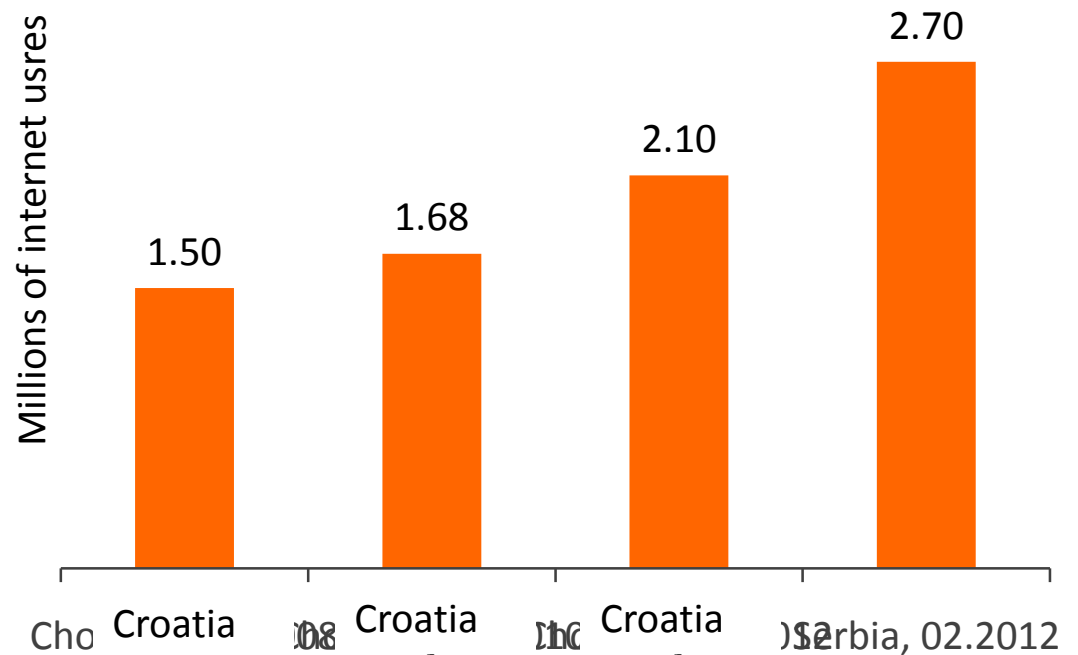
Online adspends in Croatia



- In 2010 Serbian online market was worth one third of Croatian market
- **Serbia starts from the lower base than Croatia few years ago**

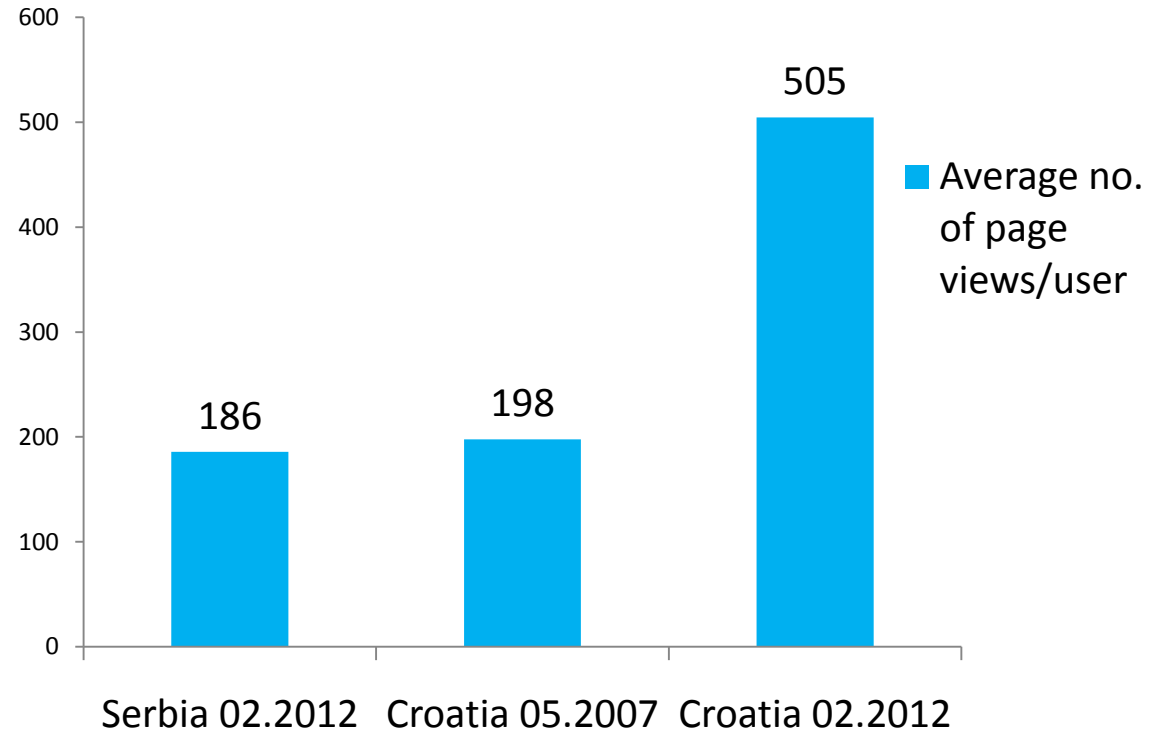
And there are audiences to target

- Though Croatian internet population is growing systematically it is still smaller than in Serbia



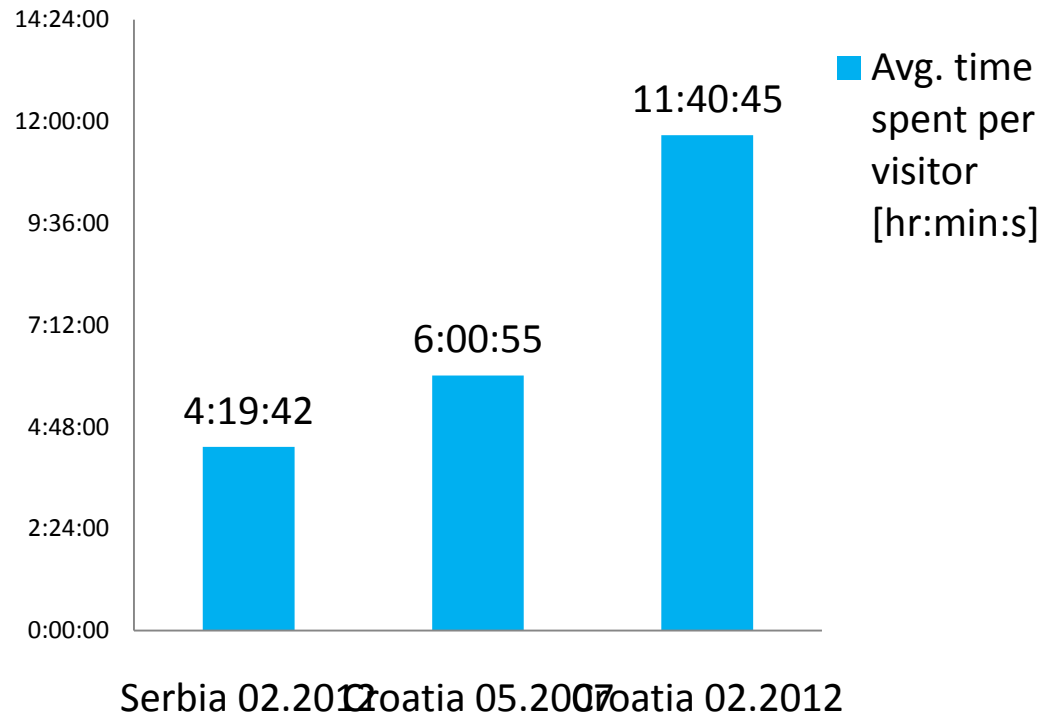
The engagement of internet users is growing

- Both number of PV and time increased dramatically in Croatia over the years
- **Serbian users' engagement will grow with time together with raising attractiveness of the online content**

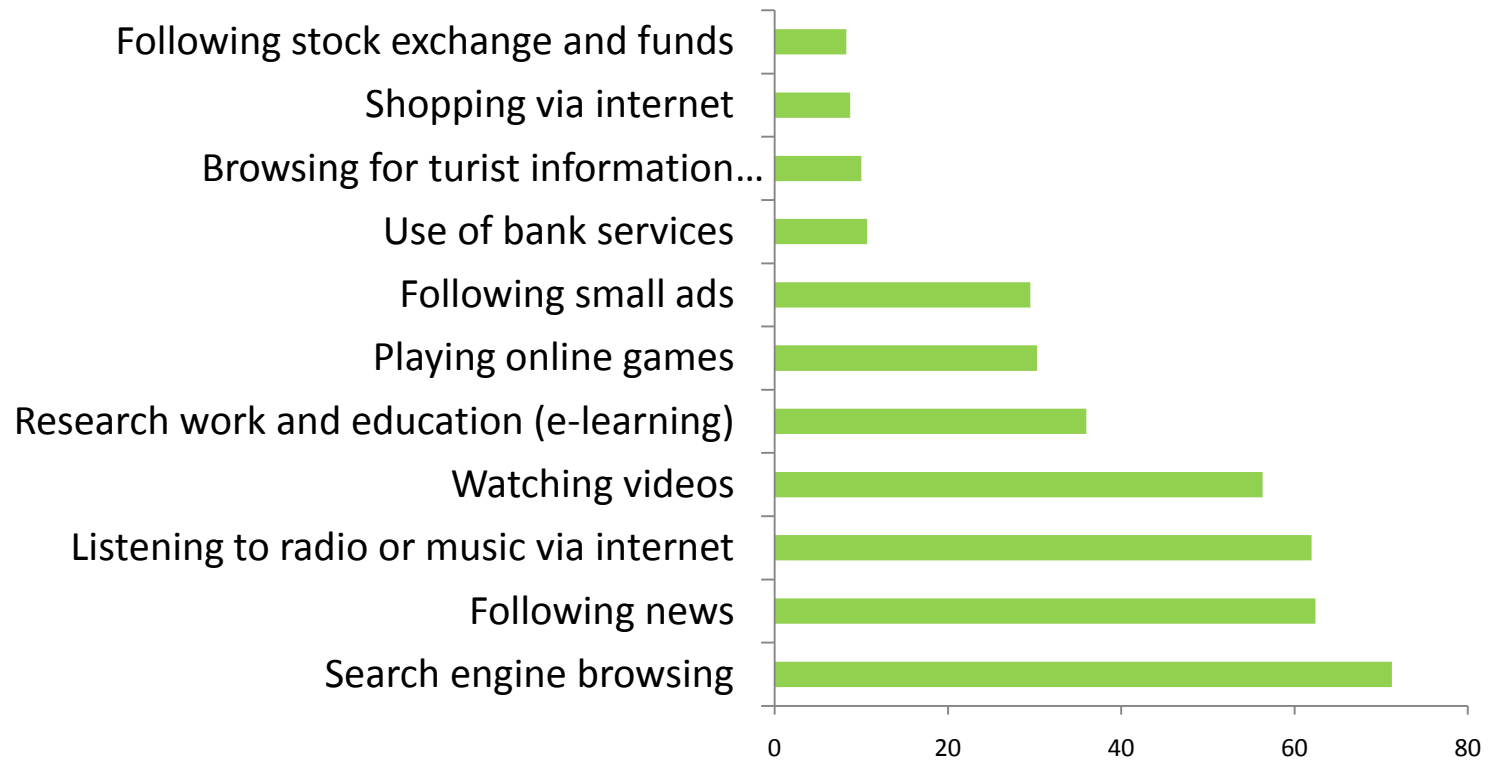


Time is money

- **Croatian users spent 2.5 times more time online than Serbs**



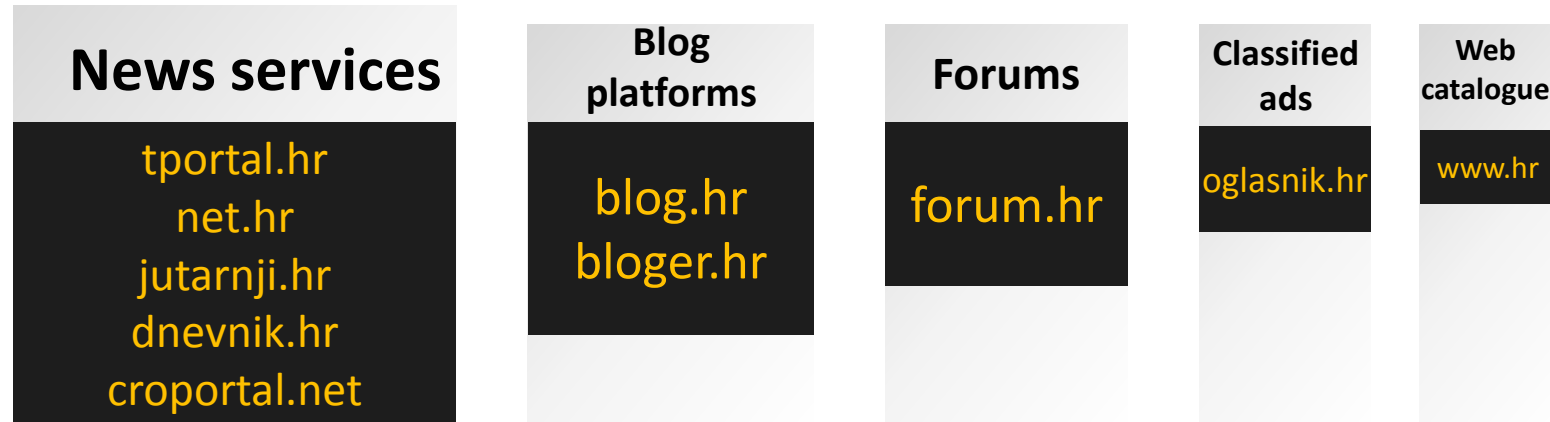
Why Serbian users go online?



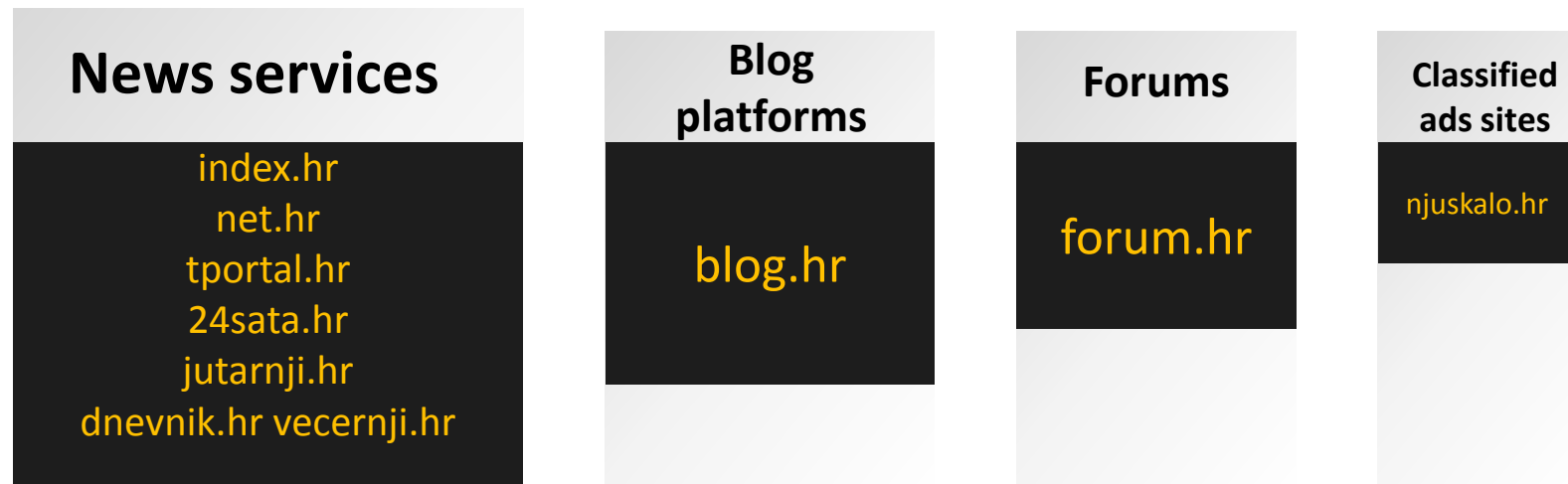
Purpose of internet usage (once a week or more frequent) - % of internet users

Top 10 popular sites in Croatia

In May 2007



In February 2012



Top 10 popular sites in Serbia

In February 2012

News services

blic.rs
b92.net
kurir-info.rs
naslovi.net
rts.rs
novosti.rs
pressonline.rs
smedia.rs

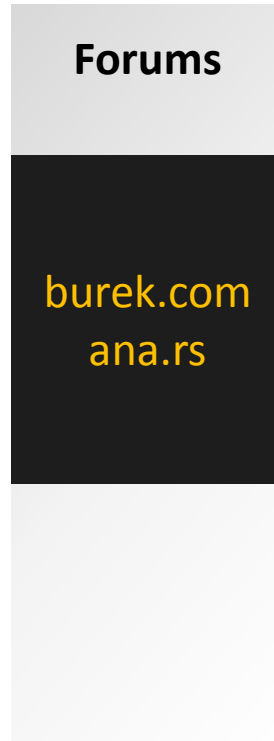
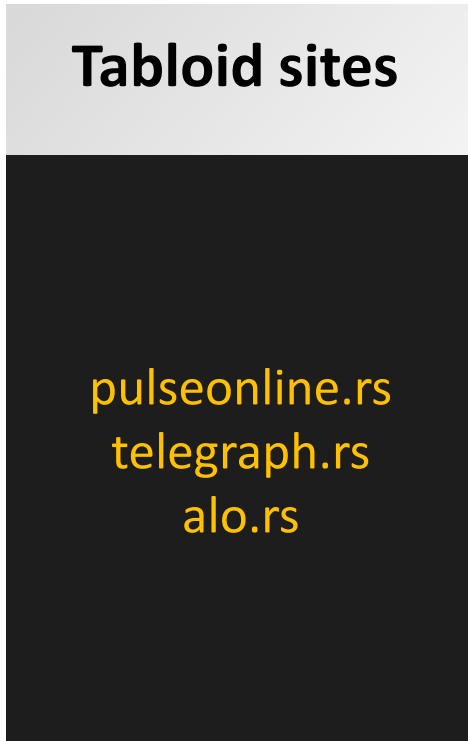
Entertainment sites

vukajlija.com
ilol.rs

- Major sites in Serbia have their origins in offline media groups, except of Naslovi.net
- **Serbian users are more interested in the fun side of the Web than Croats**
- They are not mere consumers: one of most popular sites with humour, vukajlija.com, is place where visitors provide content

Other winners

In February 2012



- There's even more fun in celebrity gossips and on e-forums
- Telegraph.rs is a great case of internet startup in Serbia
- Most popular Burek sections are:
 - 18+
 - Politics
 - Sport
 - Music
 - Movies
 - Youth Consultancy

High duplication of users between main sites?

- In Serbia you can still find unique audiences on top sites

Duplication of users	kurir-info.rs	pressonline.rs	rts.rs	b92.net	smedia.rs	naslovi.net	novosti.rs	blic.rs
kurir-info.rs	100,00%	41,47%	35,21%	55,29%	29,40%	39,94%	39,52%	72,29%
pressonline.rs	63,47%	100,00%	36,98%	61,81%	32,38%	41,86%	48,37%	80,55%
rts.rs	46,89%	32,17%	100,00%	58,23%	29,51%	39,25%	35,14%	66,64%
b92.net	46,08%	33,66%	36,45%	100,00%	27,83%	39,09%	34,63%	69,15%
smedia.rs	47,65%	34,30%	35,93%	54,14%	100,00%	39,58%	35,98%	65,45%
naslovi.net	51,00%	34,92%	37,63%	59,88%	31,17%	100,00%	37,58%	69,69%
novosti.rs	58,49%	46,77%	39,07%	61,50%	32,85%	43,57%	100,00%	76,64%
blic.rs	46,89%	34,13%	32,46%	53,82%	26,19%	35,40%	33,58%	100,00%

Sexy target groups – where can they be found

Teens

15-24

vukajlija.com

ilol.rs

JUST FOR FUN



Young women

25-34

zena.blic.rs

ana.rs

LADIES TALKING
FASHION, FAMILY
AND ;)

Young men

25-34

blic.rs

burek.rs

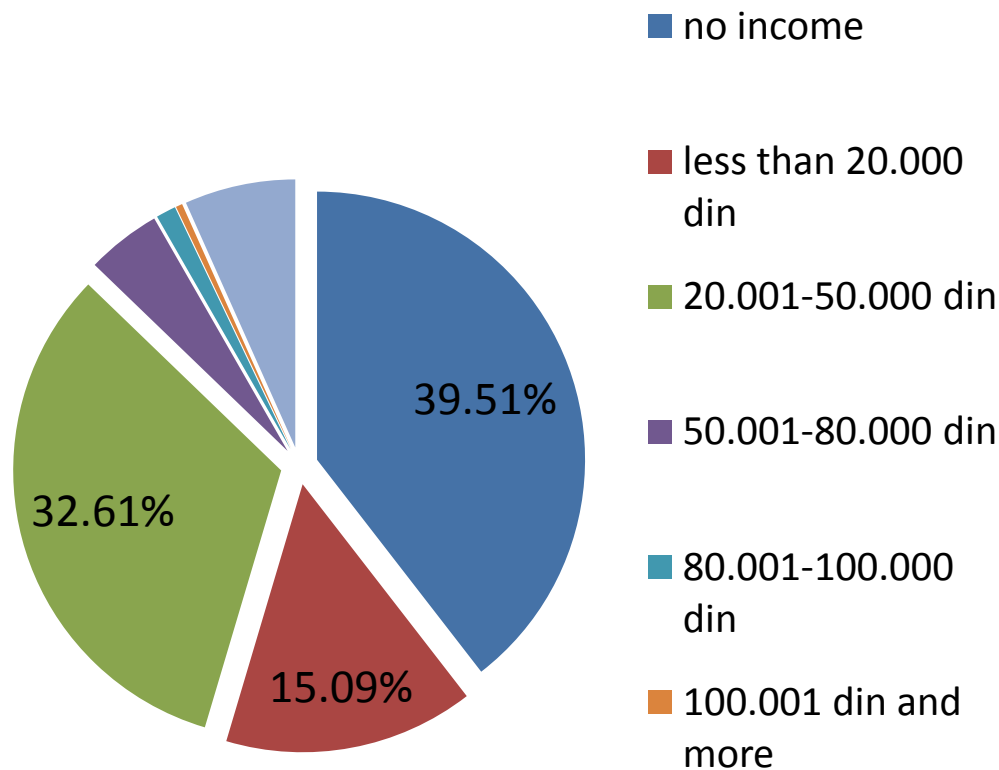
MAN TALKING
SPORT, €, POLITI
CS AND ;)



What is the profile of Serbian users?

Do they have money to spend online?

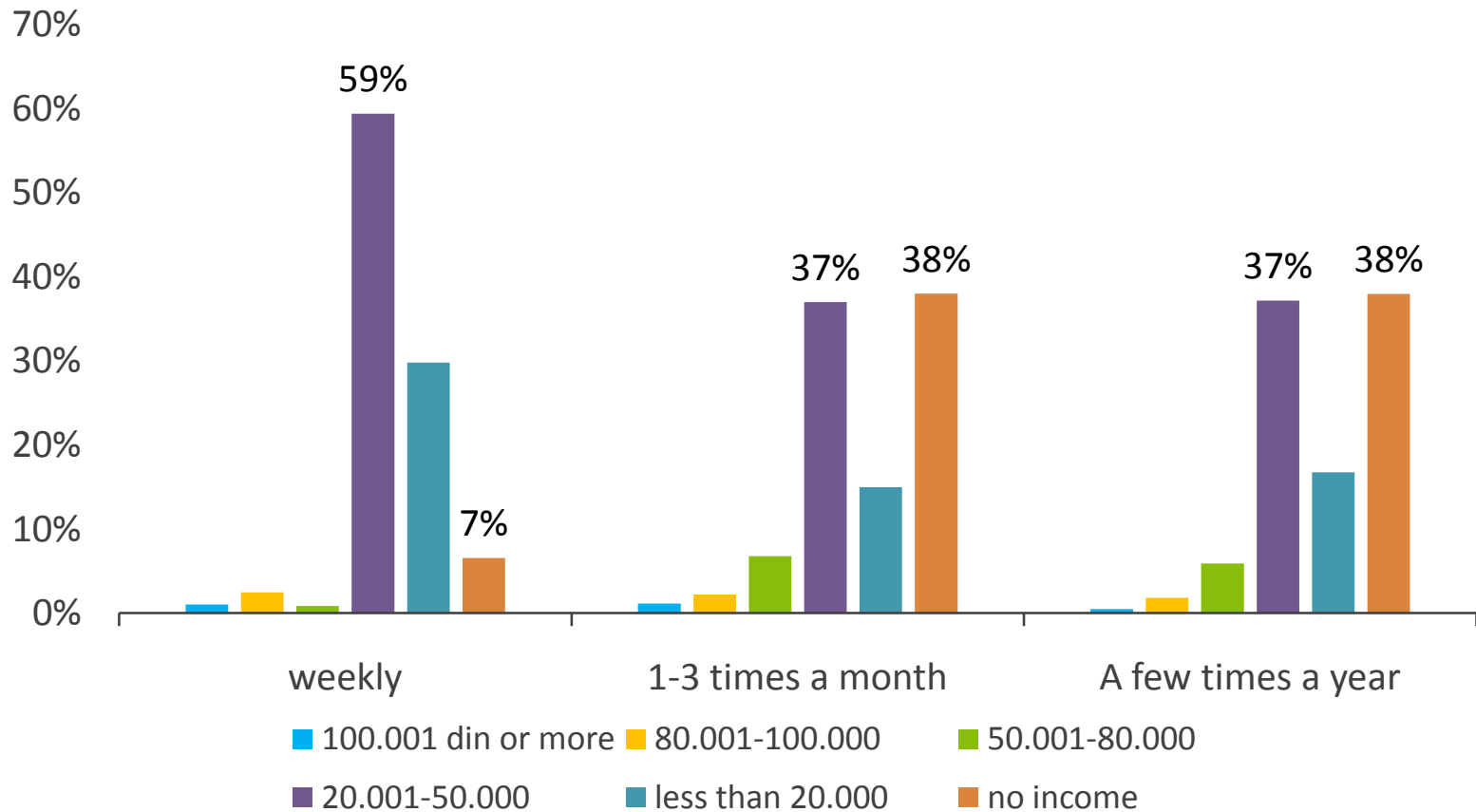
How much Serbian internet users earn?



- **Most of the users are in the middle income groups**
- Still nearly 40% of the internet users declare they have no income – can they be attractive for online advertising or e-commerce?

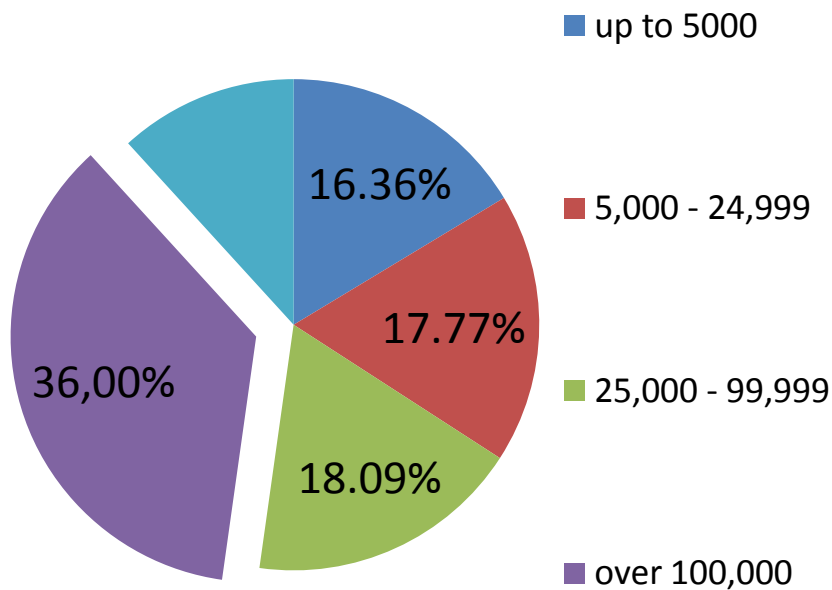
Housewives and students can also be e-consumers

Personal income and frequency of online shopping

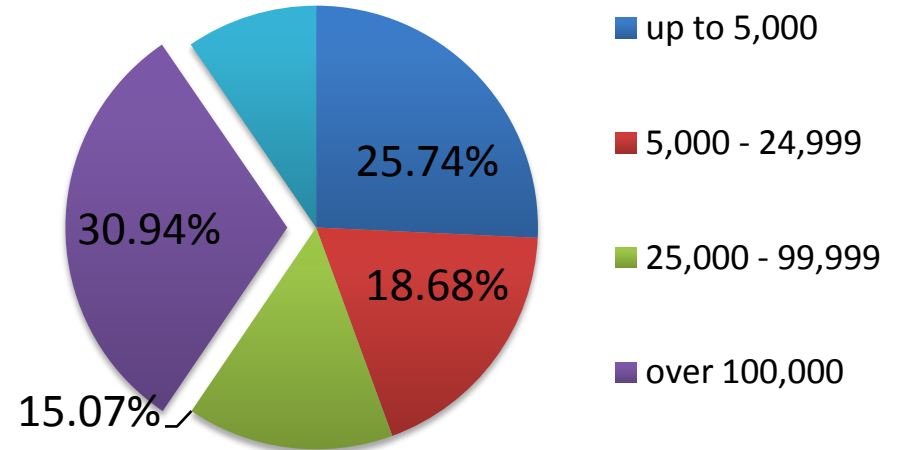


Domination of users from large cities

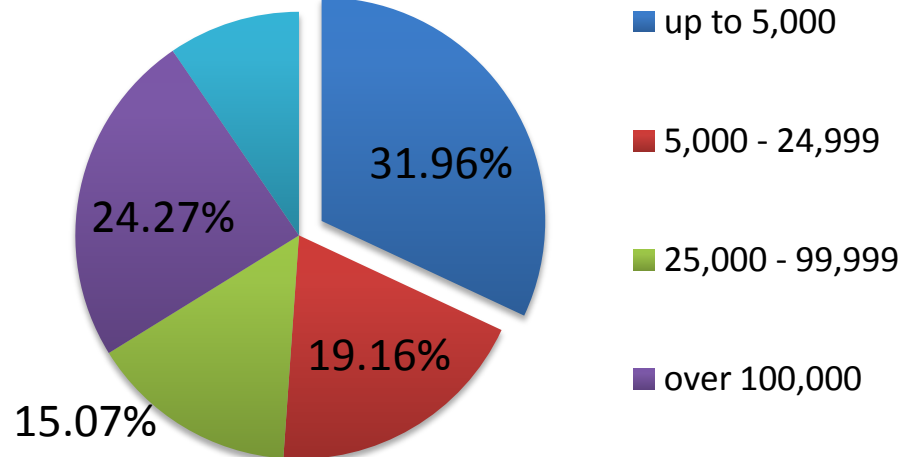
Serbia 2012



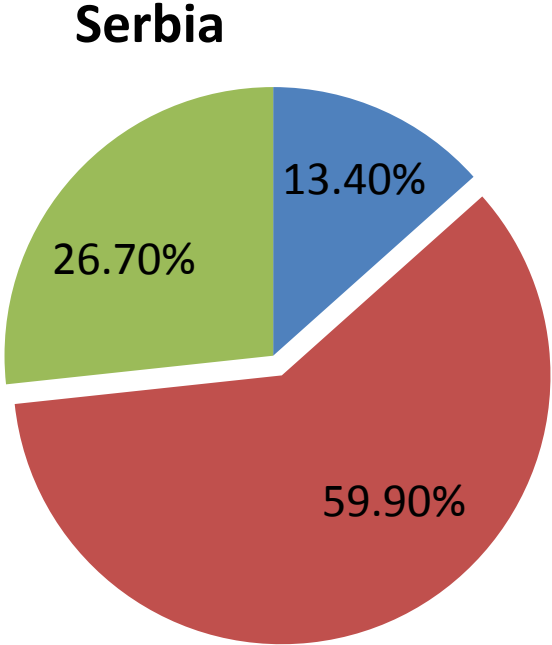
Croatia 2007



Croatia 2012



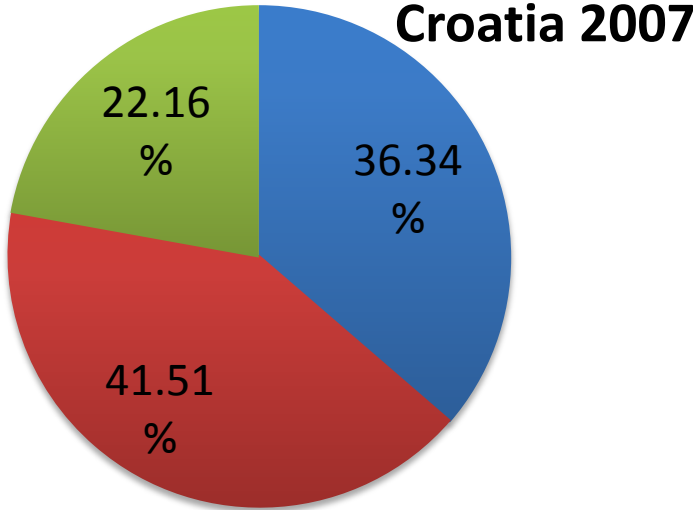
More high school graduates in Serbia than in Croatia few years ago



■ elementary school or less

■ high school

■ high, higher school, university or more





And how do we know it all?

They key is to calculate Real Users




Unique Users VS Real Users

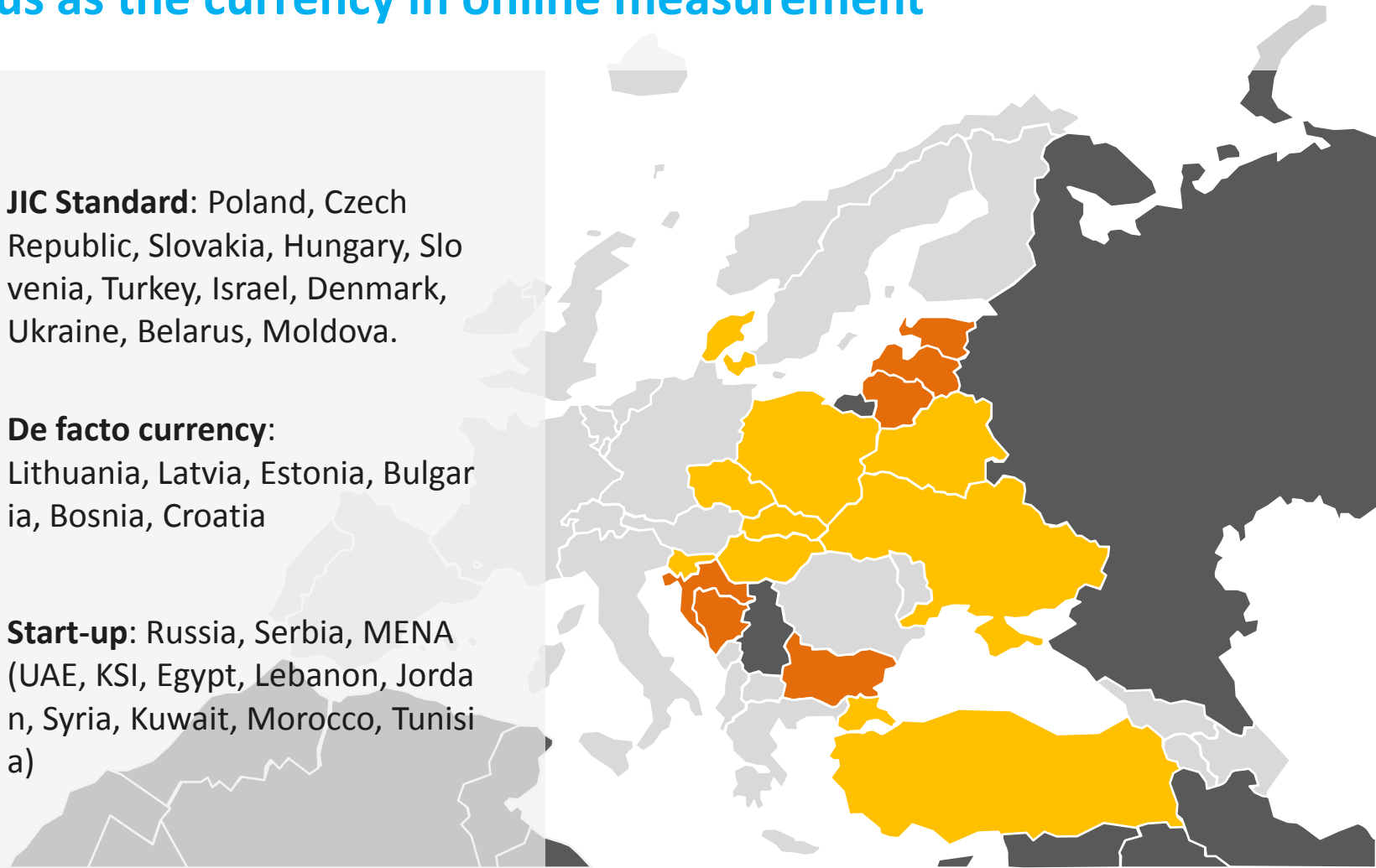
Those two terms sound similar but in fact represent extremely different numbers.

- **Unique users represent number of cookie files and can be much higher than total population of internet users in given country.** It can show how popular the page is but not how many people can actually be reached by it.
- **Real users on the other hand represent number of actual, real people that visit given site.**

So number of unique users sounds more impressive but number of real users is far more credible.

Gemius as the currency in online measurement

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



THANK YOU



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