Smart, Intelligent and Mobile
# THE TIME IS NOW

**MARTA KLEPKA**

**mobile internet**

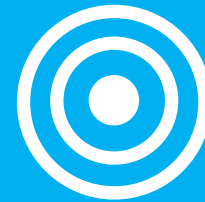**market size**

**market characteristics**

**what we know**

**research opportunities**

**main conclusions**

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# What is the mobile internet?

the use of the internet on **mobile devices**
allowing  users to access the internet
even when they are **on the move**

**mobile browsers**          **applications**          **mobile websites**

# What is a mobile device?

# Technology driven business

'*Today,* **4G and long-term evolution (LTE) network** *is to the mobile industry with regard to mobile internet as GSM (Global System for Mobile communications) service used to be with regard to voice.*'

Christopher Mattheisen, Chief Executive, Magyar Telekom

'*I take notes and tweet with my* **iPad***, shoot video and photos with my* **iPhone** *and edit and write with my MacBook Pro. Thank you, Steve Jobs, for changing the way we tell stories.*'

Ayee Macaraig, journalist from Philippines on Twitter

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it takes more time than we expected

# evolution of communication

but it's happening now

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mobile
internet

market
size

market
characteristics

what
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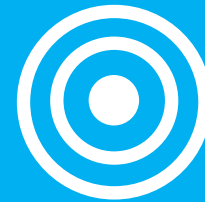
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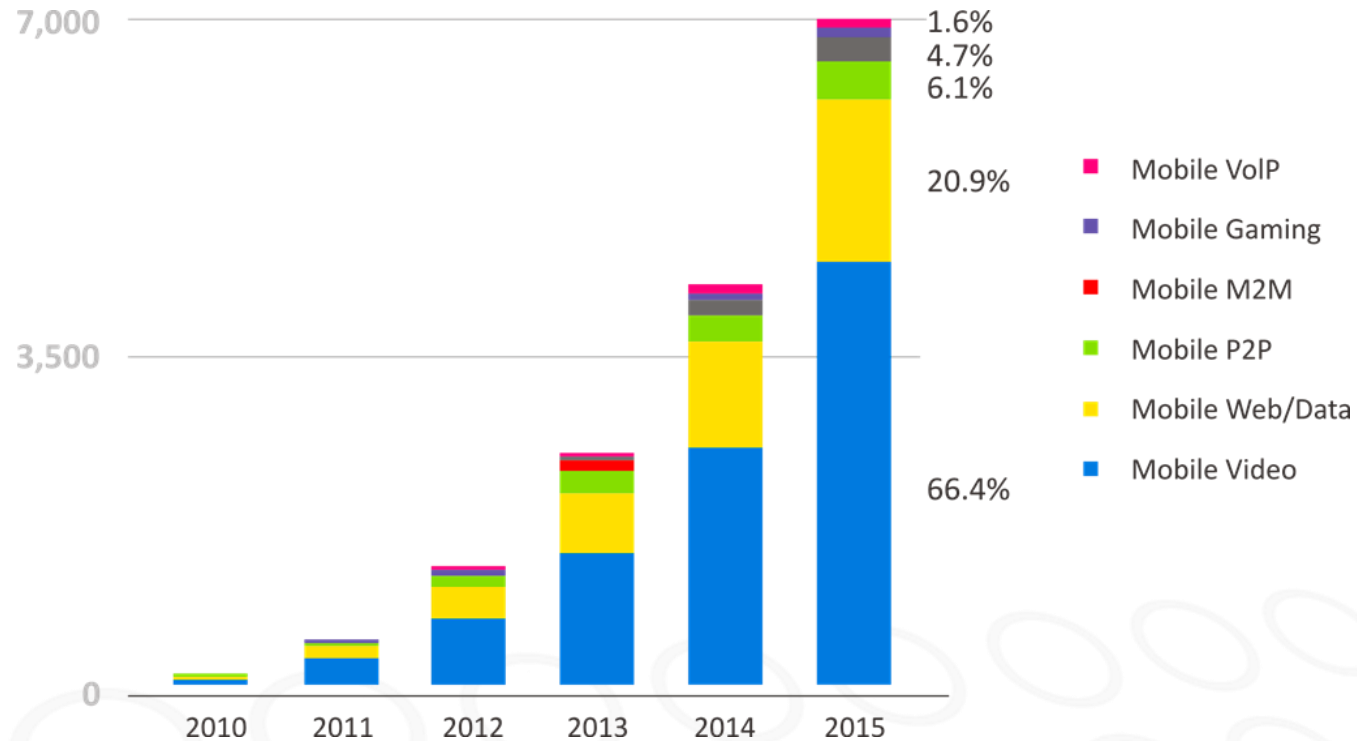
# Mobile internet: how big is it?
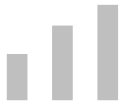
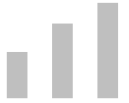**Global mobile data traffic by type (petabytes per month)**

• Globally, **mobile data traffic will increase 26 times** between 2010 and 2015.

• **Mobile video traffic** will **exceed 50 percent** for the first time in 2011.

• Mobile network connection **speeds doubled** in 2010.



Legend:
- Mobile VoIP
- Mobile Gaming
- Mobile M2M
- Mobile P2P
- Mobile Web/Data
- Mobile Video

Chart values (2015): 1.6%, 4.7%, 6.1%, 20.9%, 66.4%

Y-axis: 7,000 / 3,500 / 0
X-axis: 2010, 2011, 2012, 2013, 2014, 2015

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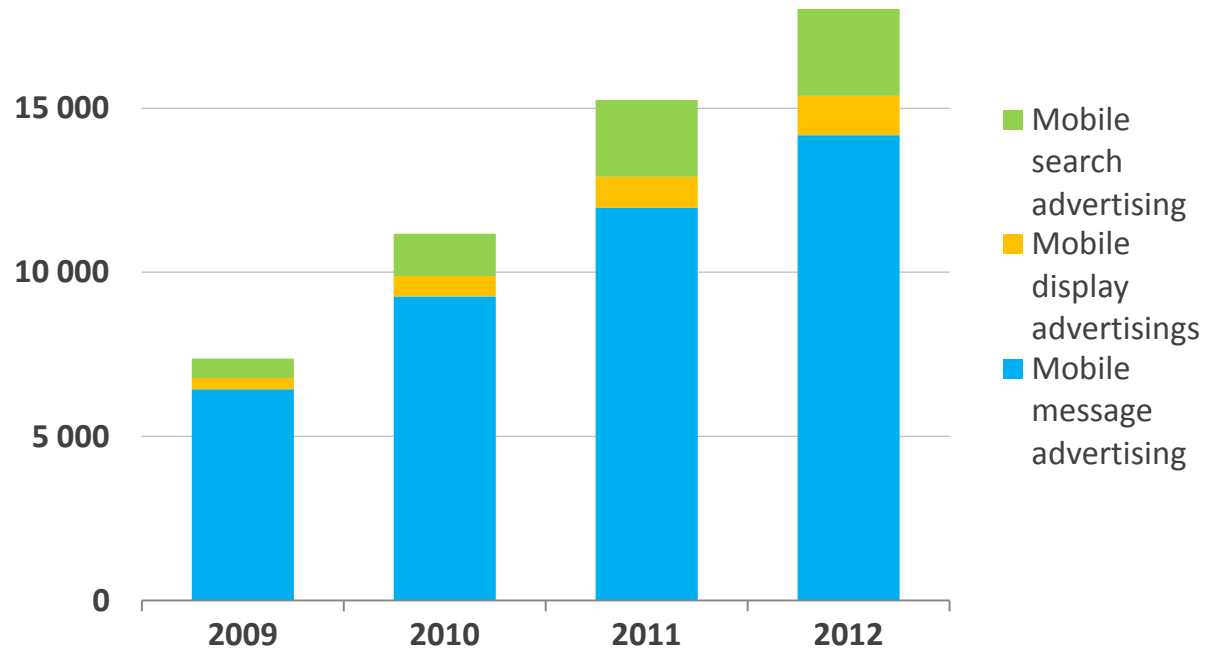**Smart, Intelligent and Mobile**
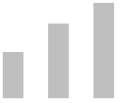**THE TIME IS NOW**

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# Mobile internet ad spends worldwide: which formats? 2007-2012 (in millions)

**Total mobile adspends (mm$)**

| Year | Total |
|------|-------|
| 2007 | **2,695** |
| 2008 | **4,586** |
| 2009 | **7,375** |
| 2010 | **11,179** |
| 2011 | **15,250** |
| 2012 | **19,149** |



Legend:
- Mobile search advertising
- Mobile display advertisings
- Mobile message advertising

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# Mobile internet: how big is it?

**CEE – share of page views generated by visitors using mobile devices and PC computers**

**Hungary** — 1,57 %

**Czech Republic** — 2,10 %

**Slovakia** — 4,16 %

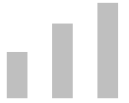**Denmark** — 7,21 %

**Ukraine** — 1,96 %
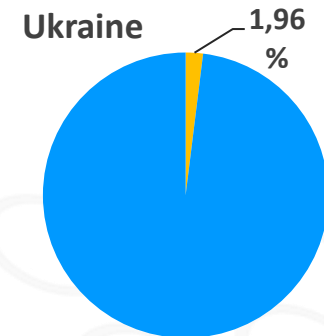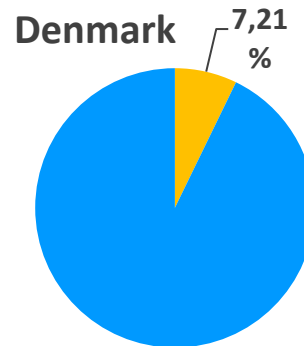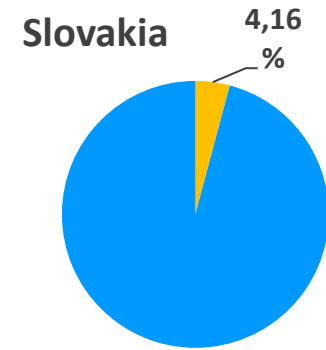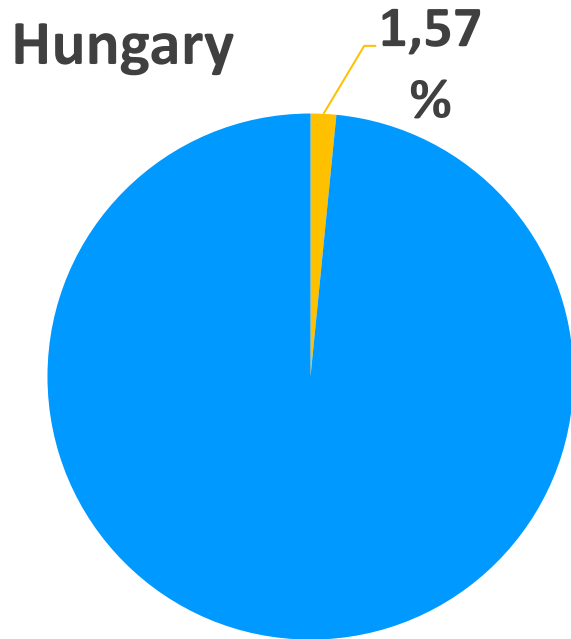
■ Page views - mobile devices
■ Page views - PC computers and other

**Samsung = 21.1%    Apple = 35.7%**

website-averaged percentage share of page views generated by Samsung and Apple products in Hungary
**Source of data: Gemius, gemiusTraffic, 26.09.2011 – 02.10.2011**

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Source of data: Gemius, gemiusTraffic (August 2011).

# CEE vs. Other regions

## Philippines

**30 M** internet users, ~30% penetration

**5% - 1.5 M** using mobile internet

The **social networking** capital of the world

## Poland

**19 M** internet users, 54% penetration

**21% - 4 M** using mobile internet

**E-mail, geolocation** - 44%, Social networking & video – over 30%

## Australia

**17 M** internet users, 78% penetration
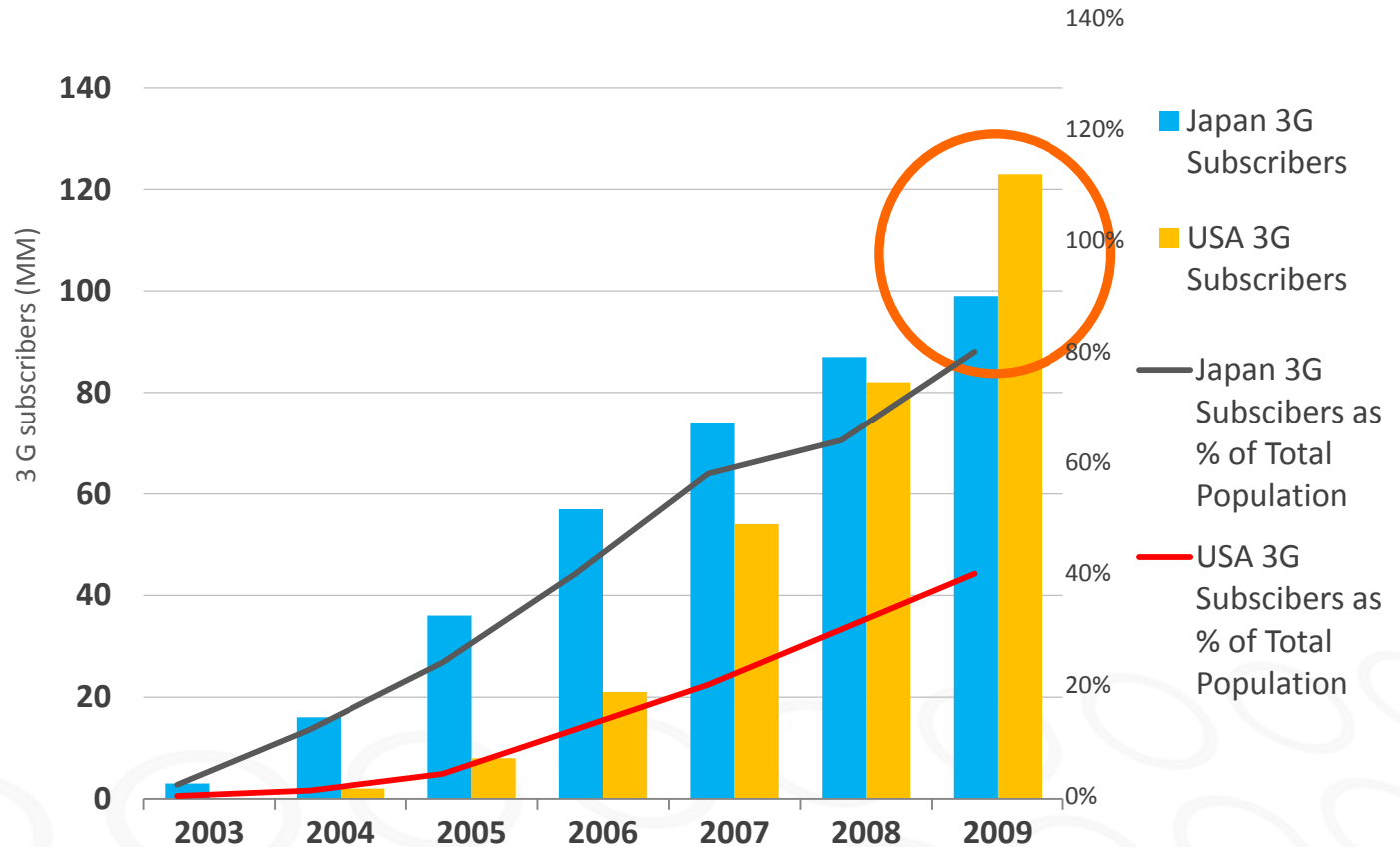
**>50% - >8 M** using mobile internet

**Mobile entertainment, news, search**

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# Mobile internet – Tortoise vs. Hare?

**USA and Japan 3G subscribers**

**USA surpassed Japan** in the number of 3G users in Q1 2009



Legend:
- Japan 3G Subscribers
- USA 3G Subscribers
- Japan 3G Subscibers as % of Total Population
- USA 3G Subscribers as % of Total Population

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# Mobile users > desktop users within a few years

**Global mobile vs. desktop internet user projection over several years**



Chart: Internet users [MM] vs. Year (2007–2015), with y-axis from 0 to 2 500.

- Desktop Internet Users (blue line): starts ~1 100 in 2007, rises to ~1 650 by 2015.
- Mobile Internet Users (yellow line): starts ~400 in 2007, rises to ~1 950 by 2015.
- Crossover highlighted with red circle around 2013–2014.

Legend: Desktop Internet Users, Mobile Internet Users

Source of data: Morgan Stanley Research

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# Mobile internet: still a niche?

usage patterns are different
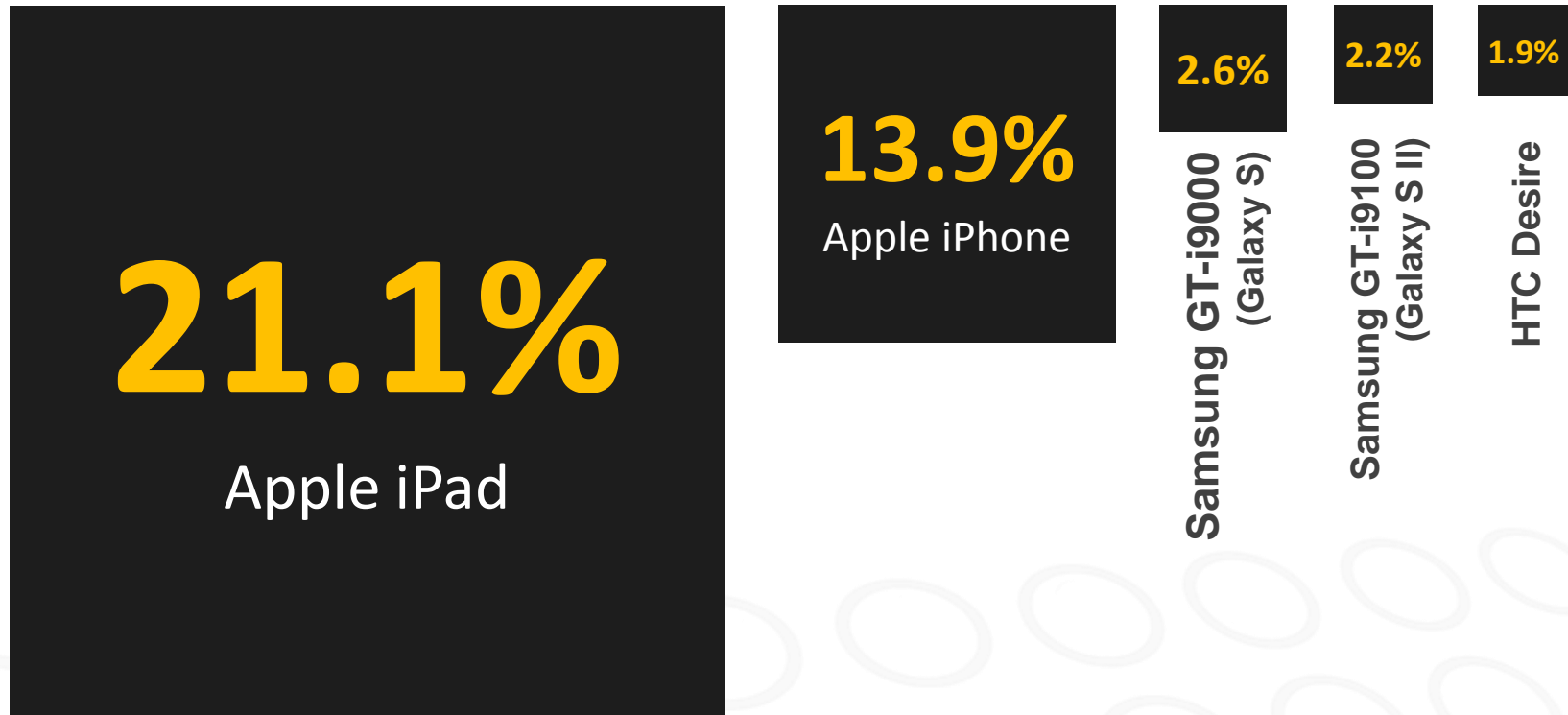
# not quite...

great need for mobile audience measurement

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# Preferences of mobile internet users: devices

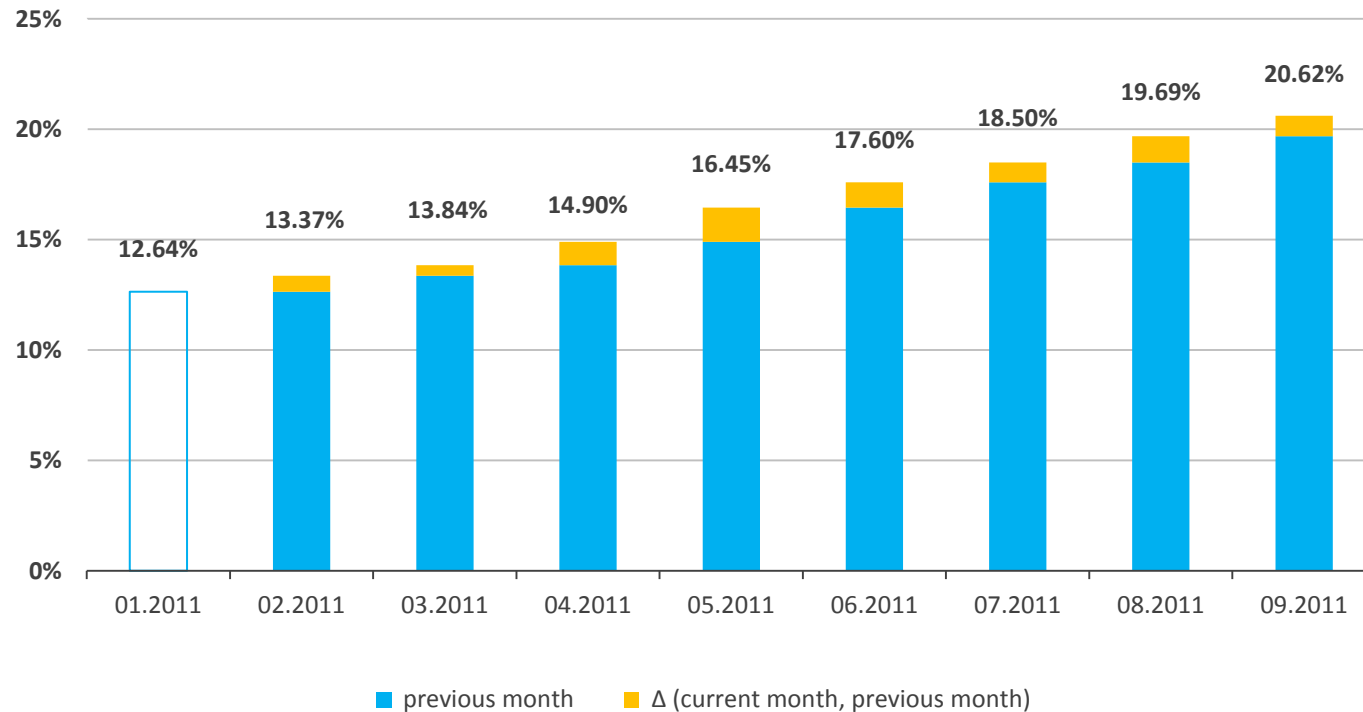**CEE – top 5 mobile devices (models) by website-averaged percentage share of page views generated on websites monitored by Gemius**
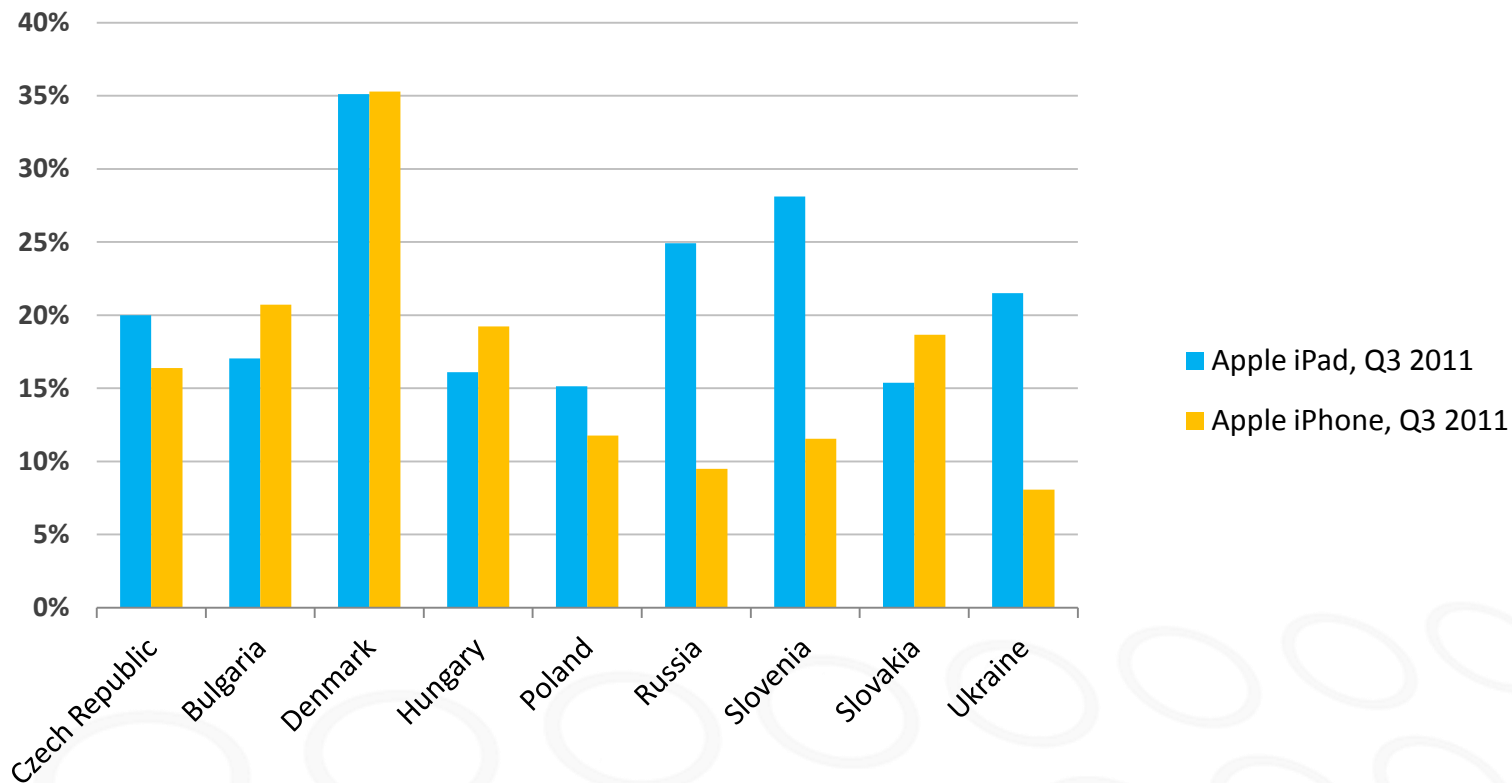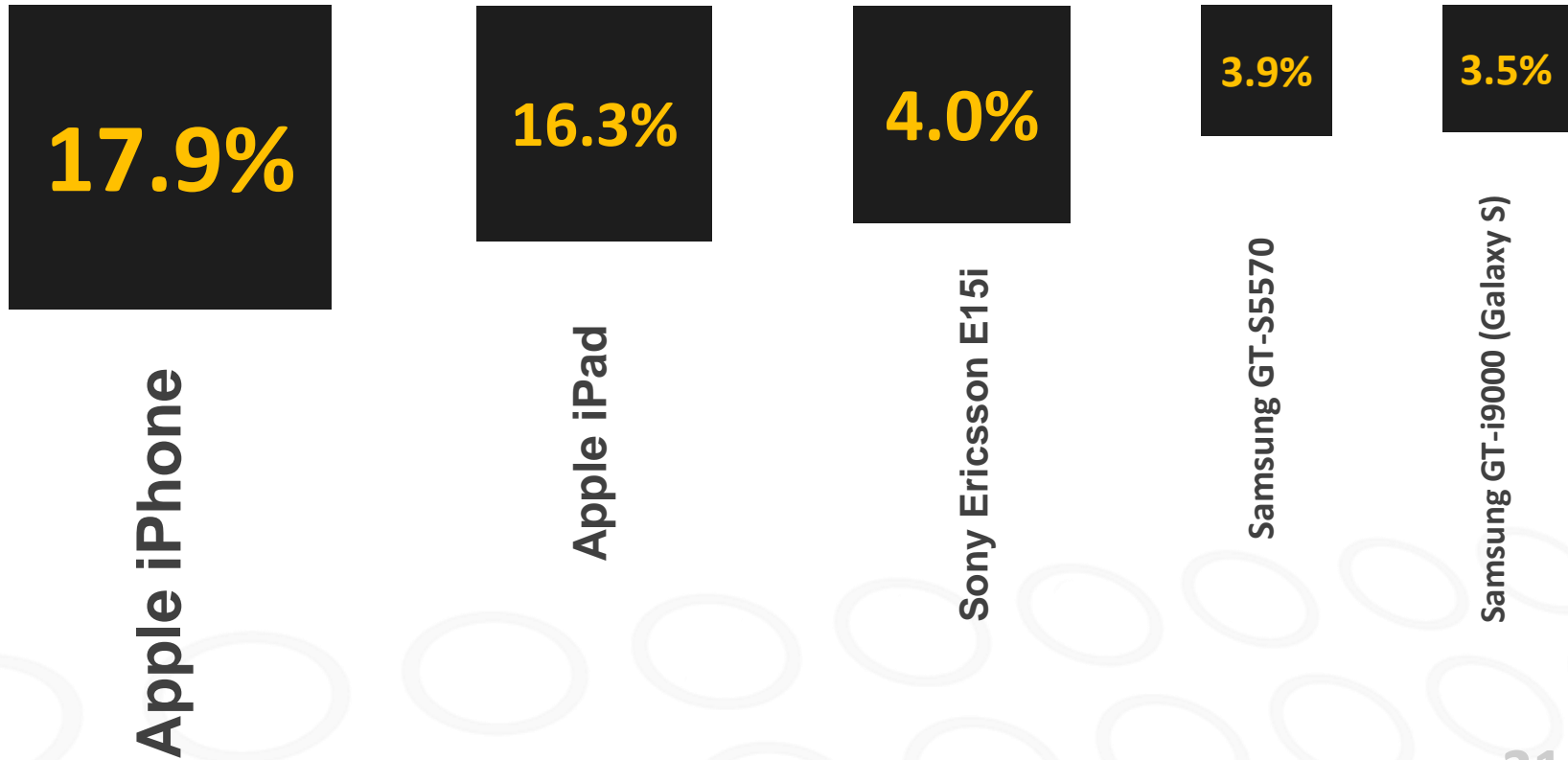
**21.1%**

Apple iPad

**13.9%**

Apple iPhone

**2.6%**

Samsung GT-i9000 (Galaxy S)

**2.2%**

Samsung GT-i9100 (Galaxy S II)

**1.9%**

HTC Desire

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# iPad – the big boost…

**CEE – growth of average share of page views generated by iPad among all mobile page views**



Legend: ■ previous month  ■ Δ (current month, previous month)

Chart data:
- 01.2011: 12.64%
- 02.2011: 13.37%
- 03.2011: 13.84%
- 04.2011: 14.90%
- 05.2011: 16.45%
- 06.2011: 17.60%
- 07.2011: 18.50%
- 08.2011: 19.69%
- 09.2011: 20.62%

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# The website-averaged percentage share of page views generated from iPad and iPhone on the selected markets



Legend:
- Apple iPad, Q3 2011
- Apple iPhone, Q3 2011

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# Preferences of mobile internet users: devices

**Hungary – top 5 mobile devices (models) by website-averaged percentage share of page views generated on websites monitored by Gemius**

**17.9%**

**16.3%**

**4.0%**

**3.9%**

**3.5%**

**Apple iPhone**

**Apple iPad**

**Sony Ericsson E15i**

**Samsung GT-S5570**

**Samsung GT-i9000 (Galaxy S)**

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# Signs of change: browsers

**Hungary – top 8 web browsers by share of page views generated on websites monitored by Gemius**

**browsers dedicated** for mobile devices are becoming **more visible** on CEE markets

| | Browser | Share |
|---|---|---|
| | Firefox | 47.0% |
| | MSIE | 25.3% |
| | Chrome | 22.3% |
| | Opera | 2.8% |
| | SafariMobile | 1.0% |
| | Safari | 0.7% |
| | OperaMini | 0.4% |
| | Symbian | 0.1% |

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# Signs of change: systems

**Hungary – top 9 operating systems by share of page views generated on websites monitored by Gemius**

the most popular operating systems – the **emergence** of mobile products

| | | |
|---|---|---|
| | Windows XP | 58.9% |
| | Windows 7 | 32.9% |
| | Windows Vista | 4.5% |
| | Mac OS X | 1.2% |
| | Linux | 0.9% |
| | Android | 0.7% |
| | iOS | 0.3% |
| | Symbian | 0.2% |
| | Windows 2003 | 0.2% |

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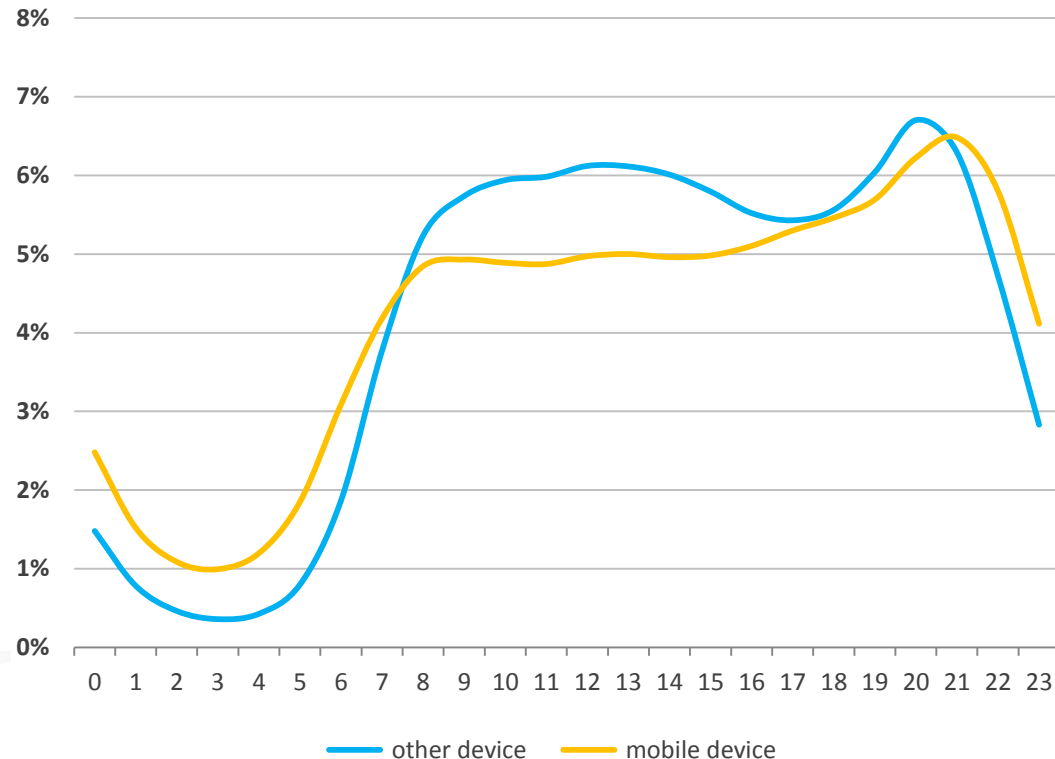**Smart, Intelligent and Mobile**
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# Daily activity of mobile internet users

**8 selected CEE markets – average daily distribution of mobile and non-mobile page views**

we **observe** mobile users **very closely**

they **get up earlier** and **go to bed later** than traditional internet users



other device   mobile device

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# Top 10 Polish websites according to the number of RU vs. top 10 websites according to the percentage of mobile page views made

## Top 10 Polish domains according to the number of Real Users

| | Name | Reach | Percentage of mobile Page Views |
|---|---|---|---|
| 1. | onet.pl | 64.34% | 1.47% |
| 2. | allegro.pl | 59.69% | 0.27% |
| 3. | wp.pl | 57.93% | 2.61% |
| 4. | gazeta.pl | 43.71% | 3.04% |
| 5. | interia.pl | 40.73% | 1.39% |
| 6. | chomikuj.pl | 27.30% | 1.33% |
| 7. | zumi.pl | 26.53% | 2.01% |
| 8. | ceneo.pl | 24.81% | 0.29% |
| 9. | wrzuta.pl | 23.66% | 0.46% |
| 10. | o2.pl | 22.64% | 1.09% |

**VS.**

## Top 10 Polish domains according to the number mobile page views made

| | Name | Percentage of mobile Page Views | Category |
|---|---|---|---|
| 1. | lajt.pl | 93.99% | light version of onet.pl |
| 2. | mtraffic.pl | 80.77% | light version of targeo.pl |
| 3. | pixelfun.pl | 64.54% | mobile social network |
| 4. | mobini.pl | 52.72% | mobile social network |
| 5. | 3gplay.pl | 25.64% | service with mobile gadgets |
| 6. | hitmax.pl | 19.58% | service with mobile gadgets |
| 7. | kontastudenckie.pl | 14.33% | service about students' banking |
| 8. | applemania.pl | 12.78% | service for Apple fans |
| 9. | simblog.pl | 11.02% | service about mobile phones |
| 10. | wcipy.pl | 10.99% | sites with jokes |

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Source: Megapanel PBI/Gemius, 07.2011, n=12 253

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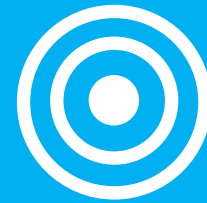
# Methodology: gemiusMobileAudience



gate-way data from **operators**

**mobile** socio--demographic **panel**

**site-centric** measurement

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# Methodology: gemiusMobileAudience



measurement based on **tags** implemented on the **mobile websites** participating in the project

**key indicators:**

- page impressions
- visits
- time spent
- users
- technical information
  - device type
  - device producer
  - browser
  - operating system

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# Methodology: gemiusMobileAudience

**Anonymised** and **aggregated** data provided by **operators** and processed by **Gemius**

logs from servers:
- time
- URL address
- user ID
  (eg. hashed MSISDN)
- technical data
  (eg. mobile device, browser)

# Methodology: gemiusMobileAudience



## operator
link to the **recruitment survey** (matched with ID number of the user)

## user
- **survey**

- **consent** to deliver internet activity logs to Gemius

## Gemius
data saved in Gemius **central database**

# Implementation: option I

**Measurement based on traffic data**



**PUBLISHER** → **SCRIPT**

**PANELIST**
(COOKIE)

```
<!-- (C)2000-2010 Gemius SA - gemiusAudience
<script type="text/javascript">
//<![CDATA[//><!--
var pp_gemius_identifier = new String('ident
//--><!]]>
</script>
<script type="text/javascript"
src="http://main_script.js"></script>
```

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**SERVERS**

# Implementation: option II

**Measurement using CATI method**

**PUBLISHER** → **SCRIPT** ← **PANELIST**
(COOKIE)
← **CATI STUDIO**

```
<!-- (C)2000-2010 Gemius SA - gemiusAudience
<script type="text/javascript">
//<![CDATA[//><!--
var pp_gemius_identifier = new String('ident
//--><!]]>
</script>
<script type="text/javascript"
src="http://main script.js"></script>
```

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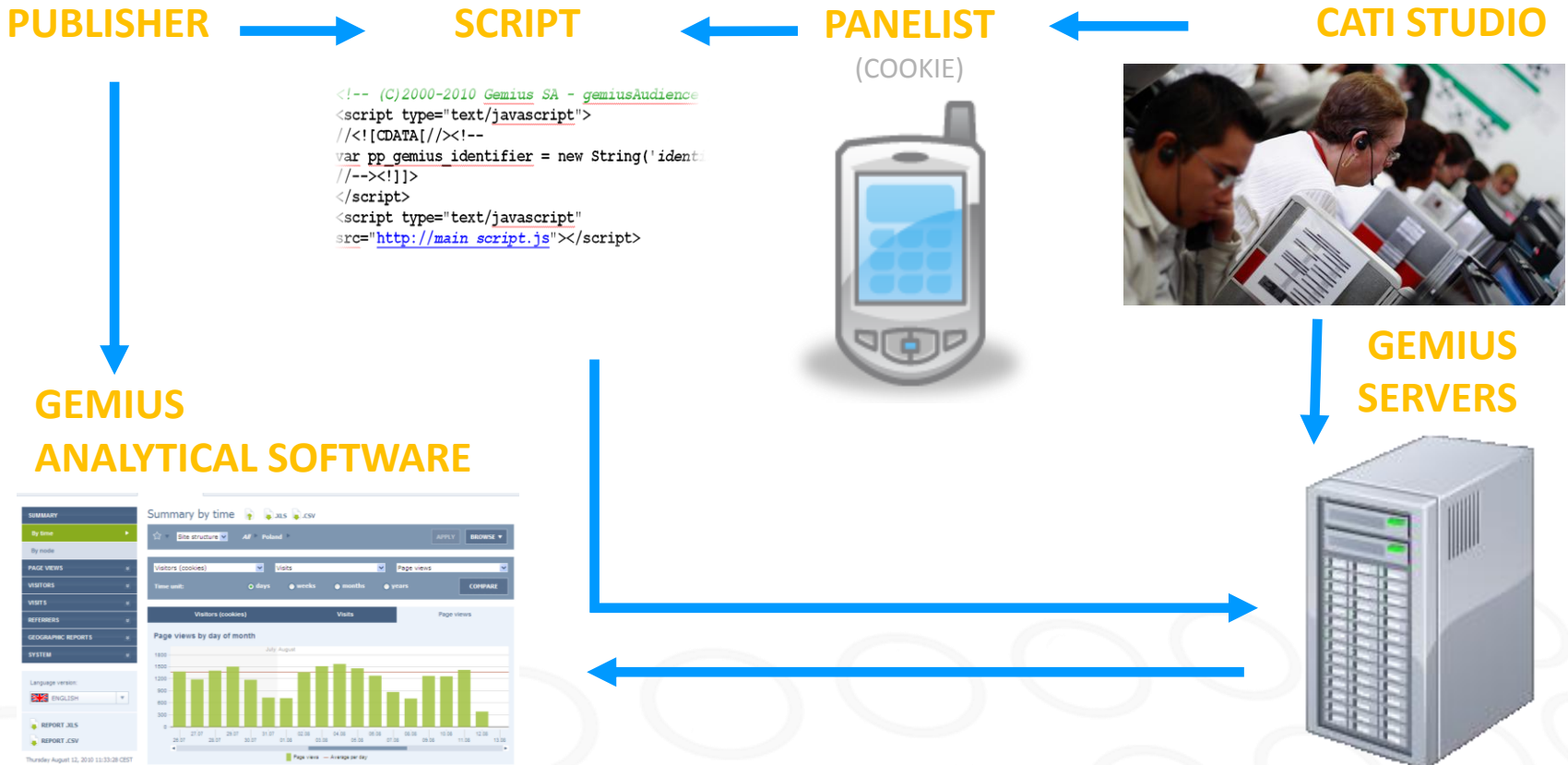
# Implementation: option III

**Measurement involving mobile operators**
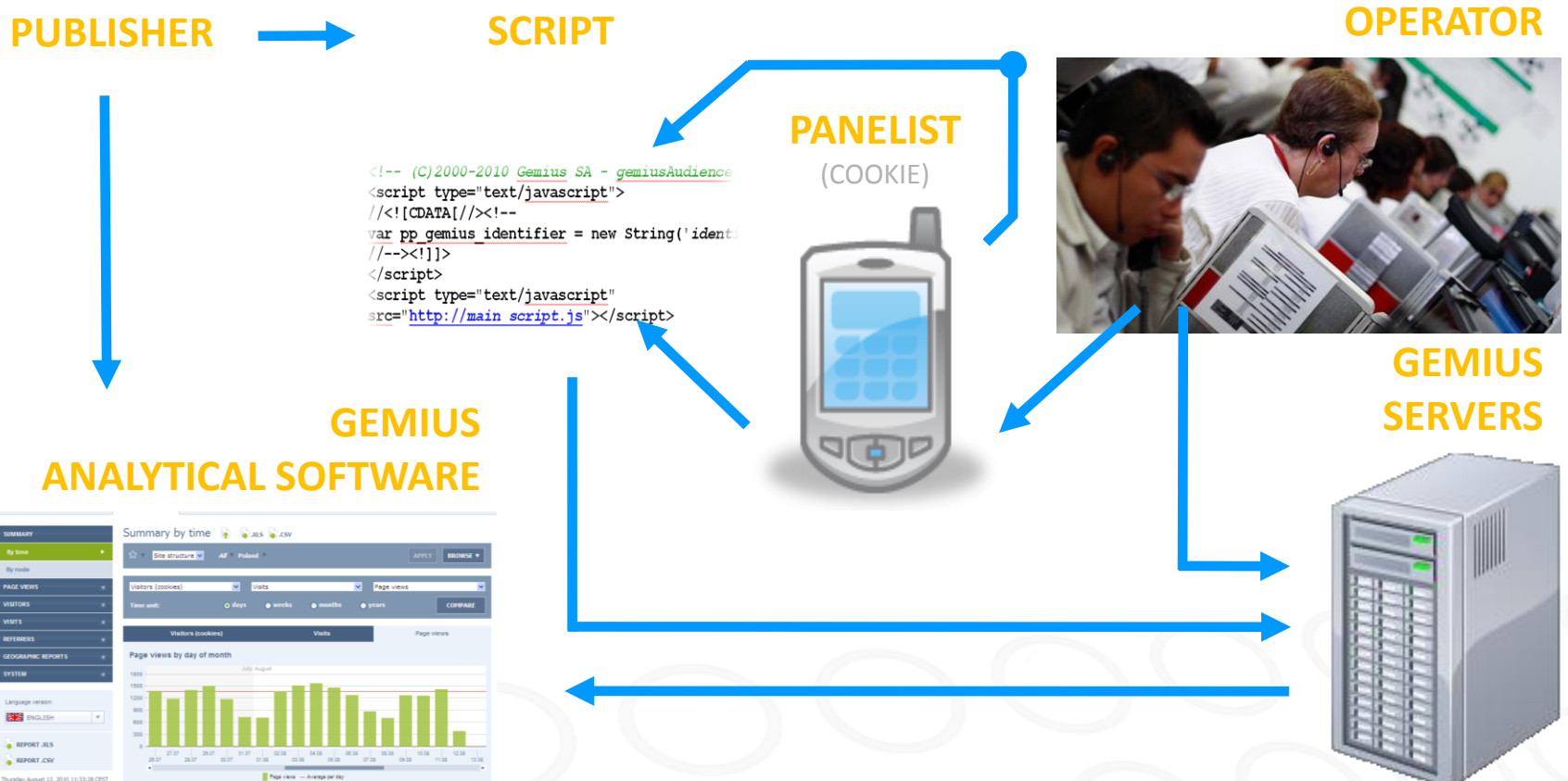
**PUBLISHER** → **SCRIPT**

**OPERATOR**

**PANELIST**
(COOKIE)

```
<!-- (C)2000-2010 Gemius SA - gemiusAudience
<script type="text/javascript">
//<![CDATA[//><!--
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//--><!]]>
</script>
<script type="text/javascript"
src="http://main script.js"></script>
```

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**ANALYTICAL SOFTWARE**

**GEMIUS**
**SERVERS**

# Main conclusions

**Why?**

growth

potential

characteristic

**behavior**

⬇

**real users**

**What?**

**Who?**

advertisers

marketers

analysts

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# THANK YOU

**Contact:**

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