

GEMIUSAUDIENCE

PANEL RESEARCH STUDY RESULTS

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Offer - May 07

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Information about gemiusAudience

gemiusAudience is the standard in online audience measurement across Eastern Europe. Developed by Gemius over the course of the past 6 years, gemiusAudience integrates offline research, site-centric measurement, pop-up surveying and user-centric measurement to provide media sellers, planners and buyers with online media planning data.

gemiusAudience is available in many countries. On some markets, Gemius works with joint-industry committees to jointly set the standard in online media planning. On other markets, gemiusAudience is developed through the building of a consensus between market players. Thus on different markets the research study is known under slightly different names.

gemiusAudience provides publishers and media agencies with practical, easy-to-use tools for online media planning. Data is provided once per month, reporting at a weekly or monthly level. Media planners make use of special analytical tools such as gemiusExplorer to optimize their online advertising campaigns.

Benefits from gemiusAudience

» for advertisers

The Internet is undoubtedly the most technologically advanced medium. The audience it reaches is growing all over the world. It is gaining as an interactive channel of communication and a medium for conducting advertising campaigns. One of the distinguishing characteristics of the Internet is the broad range of possibilities of measurement this digital medium provides. This enables advertisers to gain an overview of the conducted online campaigns, their efficiency, costs, etc.

How to ensure success in the field of advertising and marketing initiatives on the Internet?

We strongly recommend our clients make use of gemiusAudience. gemiusAudience is Central & Eastern Europe's standard in online audience measurement and constitutes the basis for planning, execution, and control of online advertising media plans. There are 21 different indicators available that enable advertisers to assess the value of selected Internet web sites as a potential place to advertise given products and services. Also, the indicators help to take optimal decisions in terms of designing advertising strategies.

gemiusAudience results enable media planners to plan each online advertising campaign in terms of:

- selecting the place of advertising creatives' emission,
- reaching the target group,
- increasing a campaign's reach in groups at which the campaign is directed,
- taking into account the problem of duplicated audience on web sites selected for a given campaign,
- thematic selection of web sites for a given marketing action.

Using gemiusAudience results gives media planners certainty that their decisions are sound and based on credible, comparable, hard data.

» for Internet publishers

Income from advertising constitutes a significant source of income for the majority of web sites. Results of the gemiusAudience research study are the basis for gaining advertisers' budgets. The study provides information on:

- the socio-demographic profile of users visiting a given web site,
- target groups, among which a given web site enjoys the greatest popularity,
- the effect of comparing the web site in which we are interested against its competitors,
- audience duplication of a few web sites belonging to one publisher.

Besides, gemiusAudience results allow for direct evaluation of promotional or brand awareness activities' effects of a given online service. The efficiency of activities can be measured e.g. when traffic, average time spent per visitor on the given web site increase or when the number of executed page views grows. Consequently, an analysis of gemiusAudience results allow for optimization of marketing activities of particular Internet services.

» for analysts of the media market and journalists

The Internet is an object of increasingly growing interest on the part of scientists, analysts, and journalists. gemiusAudience is an invaluable source of knowledge that facilitates the work of people employed in the sector of information. It enriches academic dissertations, market analyses, and supports news presented in the traditional media. gemiusAudience

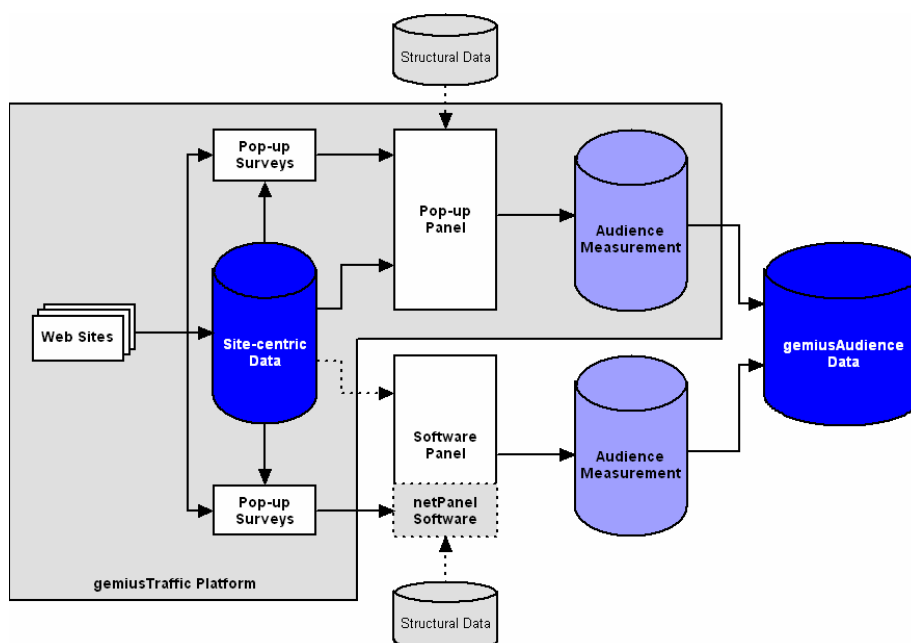
results are published on a monthly basis and they enable users to observe and identify real trends on the Central & Eastern European Internet. Each presentation of results is accompanied by thematic analyses prepared by Gemius that characterize various phenomena and trends observable in the online market.

gemiusAudience Methodology: Evolution of gemiusAudience

Over the course of the past 6 years, Gemius has conducted every type of online research possible – from log file analysis to classic (CATI-recruited) household panel monitoring. On the basis of these experiences, Gemius has developed, tested and implemented the gemiusAudience methodology across Eastern Europe with great success. However, in order to understand the strengths of the gemiusAudience approach, it is first necessary to understand some of the issues extant in online audience measurement.

Nobody has developed a practically workable „pure“ audience measurement method for online audience measurement. Each of the separate online research techniques that have been developed have various significant limitations. These limitations – based on the experiences of Gemius S.A. in Eastern Europe and confirmed in numerous methodological papers available from ESOMAR and the ARF – are known throughout the market.

Resolving the limitations of „pure“ methodological approaches requires an integration between multiple research methods. As of October 2005, only a handful of companies around the world had successfully accomplished this goal. Gemius has been conducting integrated online audience measurement since 2002 using the gemiusAudience Approach.



The gemiusAudience approach follows one of two paths:

POP-UP PANEL (for smaller markets)

SOFTWARE PANEL (for larger markets)

RESEARCH COMPONENTS

The pop-up panel approach integrates:

- **gemiusTraffic Site-centric Platform** – to collect census-based usage data from participating web sites & to manage sample selection & monitoring
- **pop-up surveys** – to collect socio-demographic data from a behaviorally representative sample of Internet users
- **Independent Structural Data** – to ensure the online sample is demographically representative of local Internet users

The software panel approach integrates:

- **gemiusTraffic Site-centric Platform** – to collect census-based usage data from participating web sites
- **pop-up surveys** – to collect socio-demographic data from a behaviorally representative sample of Internet users recruited to participate in an opt-in panel (installed the netPanel software)
- **netPanel Software** – user-centric software installed on the panel's computers (at-home & at-work) that monitors their Internet usage
- **Independent Structural Data** – to ensure the panel is demographically representative of local Internet users

RESEARCH ISSUES:

Implementing a pop-up panel approach successfully requires that the researcher deal with the following issues:

- **Cookie Deletion** – since reach data is based on cookies, the problem of cookie deletion can lead to a significant over-statement of reach. For information on how gemiusAudience's pop-up panel deals with this issue, please [click here](#).
- **Behavioral Representativeness** – since pop-up surveys skew (in all markets) towards heavy users, behavioral weighting needs to be applied to adjust for behavioral self-selection bias.

Implementing a software panel approach successfully requires that the researcher deal with the following issues:

- **Behavioral Representativeness** – since pop-up surveys skew (in all markets) towards heavy users, behavioral weighting needs to be applied to adjust for behavioral self-selection bias. For information on how gemiusAudience deals with this issue, please [click here](#).
- **Editing Rules** – because different web sites are designed differently and design technologies are constantly changing, editing rules need to be unified to provide industry standard metrics consistently across all reported web sites. For information on how gemiusAudience deals with this issue, please contact Gemius.
- **Panel Size / Population Size** – the relatively low cost of online recruitment allows for the development of large sample sizes ($n \geq \sim 10\,000$), however smaller markets cannot sustain large panel sizes cost-effectively.
- **Panel Incentives** – since participating in a panel is more intrusive than just filling out a pop-up survey, incentives (an added cost) are needed to motivate respondents to join.

END-RESULT:

The pop-up panel and software panel approaches provide identical (from the user's perspective) data. The pop-up panel can only report data for web sites that have chosen to participate in gemiusAudience. The software panel can report usage of all web sites.

APPLICABILITY:

The pop-up panel is ideal for **markets with smaller populations** (e.g. Lithuania, Latvia, Estonia). The relatively low cost is sustainable even if online ad spend is relatively low, while the unobtrusive research method ensures valid data even at low response rates.

The software panel is ideal for **markets with larger populations** (e.g. Poland, the Czech Republic). Larger markets can better afford the higher cost of the software panel approach, while their large population makes developing and maintaining a large panel viable.



The two methodologies independently report data consistent with each other – leading Gemius’ clients to believe that they are effectively interchangeable. Several markets where gemiusAudience started with a pop-up panel have since progressed to the Software Panel, with a smooth transition process.

gemiusAudience Methodology: Pop-up Panel Approach

The gemiusAudience: Pop-up Panel approach integrates several research components to generate media planning data:

- **gemiusTraffic** – the site-centric measurement system (collects usage & traffic data).
- **Pop up Surveys** – pop-up surveys displayed to a random sample of Internet users visiting participating web sites (collects socio-demographic and/or product/lifestyle data).
- **Offline Structural Research** – independent research, conducted on a regular basis using offline methods (describes the demographics of the Internet user population).

The site-centric data used by the gemiusTraffic system collects traffic/usage data for all Internet users who visit participating web sites. Within this data, Gemius also collects traffic/usage data for those Internet users who a) visited participating web sites, and b) filled out pop-up surveys (the “sample”).

These pop-up surveys are emitted randomly to a sample of Internet users visiting participating web sites. The platform controls for frequency of emission, non-repeat emission and emission distribution across time and audience. In order to estimate reach, Gemius eliminates the bias introduced by cookie deletion. This is done by isolating a sub-sample of Internet users who Gemius is certain did not delete their cookies in the reporting period.

Once the sub-sample is isolated, the dataset is then behaviorally weighted to the Internet user population, to ensure that the sample is behaviorally representative (e.g. that the average Internet user in the sample generates the same number of page views on average as the average Internet user in the population – for a complete explanation click here. This process ensures that traffic estimates in gemiusAudience are accurate and consistent with site-centric tools.

The sample is then weighted demographically to ensure demographic representation by applying structural weights from the offline structural study.



The final result is media planning data based on a sample of 20 – 50 thousand respondents, describing all participating web sites in great detail. Data is published once per month and can report periods of one month or one week.

The key difference between the pop-up panel approach and the software approach lies in the web sites reported: the pop-up panel can only report participating web sites. The software panel can report all web sites (whether they choose to participate or not).

Furthermore, because the pop-up panel does not require long-term compliance with the research, it does not require costly incentives or panel management (thus making it possible for Gemius to offer the pop-up panel approach at a lower cost than the software panel approach).

gemiusAudience Methodology: Software Panel Approach

The gemiusAudience: Software Panel approach integrates several research components to generate media planning data:

- **gemiusTraffic** – the site-centric measurement system (collects usage & traffic data).
- **Pop up Surveys** – pop-up surveys displayed to a random sample of Internet users visiting participating web sites (collects socio-demographic and/or product/lifestyle data and recruits the panel).
- **Offline Structural Research** – independent research, conducted on a regular basis using offline methods (describes the demographics of the Internet user population).
- **Panel-based Measurement** – passive monitoring of Internet usage through software installed on panelists computers (at home & at work).

The site-centric data used by the gemiusTraffic system collects traffic/usage data for all Internet users who visit participating web sites. Within this data, Gemius also collects traffic/usage data for those Internet users who have agreed to take part in the panel-based measurement (via pop-up survey).

These pop-up surveys are emitted randomly to a sample of Internet users visiting participating web sites. The platform controls for frequency of emission, non-repeat emission and emission distribution across time and audience. These pop-up surveys serve to collect socio-demographic data from one computer user and to invite the user to participate in the panel-based measurement.



If the user agrees to take part in the panel-based measurement, then subsequently the user will install Gemius' netMeter software onto their computer (at home or at work), which will report to Gemius what web sites are being visited by the user's computer. During the installation process, additional demographic data is collected for all people making use of the computer.

Because numerous studies have shown that pop-up surveys skew towards heavier Internet users, the panel is then behaviorally weighted to the Internet user population. This ensures that the sample is behaviorally representative (e.g. that the average Internet user in the sample generates the same number of page views on average as the average Internet user in the population – for more information, [click here](#)). This process ensures that traffic estimates in gemiusAudience are accurate and consistent with site-centric tools.

The sample is then weighted demographically to ensure demographic representation by applying structural weights from the offline structural study.

The final result is media planning data based on a large panel of 10 – 30 thousand panelists, describing up to 4000 web sites in great detail. Data is published once per month and can report periods of one month or one week.

The key difference between the pop-up panel approach and the software approach lies in the web sites reported: the pop-up panel can only report participating web sites. The software panel can report all web sites (whether they choose to participate or not).

Because the software panel is more intrusive than the pop-up panel, response rates tend to be lower. Furthermore, a software panel approach requires the implementation of an incentive program along with panel management. These two requirements make the software panel approach more appropriate for larger markets (markets with larger populations, like Poland or the Czech Republic).

Results of gemiusAudience are presented with the use of a special application – gemiusExplorer that is downloaded free from the Download section of our web site.

Data Subscription Rates

The subscription policies for gemiusAudience data vary from market to market. For full information on your market's local policies, please contact Filip Pieczyński:
filip.pieczynski@gemius.com.

Please be aware that in many cases, these subscription rates are agreed with the local joint-industry committee.

If you would like additional information, feel free to contact Gemius: contact@gemius.com

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Information about the Company

Gemius SA is the largest online research agency in Eastern Europe. The company has been dedicated to Internet market research since its founding in 1999. By focusing the business on maximizing credibility, quality and accuracy the company has been able to grow into the largest online market research agency in Eastern Europe in less than 5 years.

Gemius SA provides a wide range of Internet research to brand name clients throughout Eastern Europe. Gemius provides data on Internet user behavior (gemiusTraffic), Internet audience profiles (gemiusProfile), or online advertising campaign effectiveness (gemiusEffect). Gemius' gemiusAudience research is the online advertising currency across Eastern Europe, where by working with key joint-industry committees and other market players Gemius provides accurate, high-quality measurement of online audiences for media planners, buyers and sellers.

The company's goal is to go beyond statistics and to provide thorough knowledge to our clients, helping them to make the most of their investments in the online marketing channel.

The company is flexible throughout the research process, both while designing the research and in its execution. Gemius clients can always count on the assistance of the company's over 100 experienced specialists. Recently, the company has also begun to organize special training seminars for advertisers on using the Gemius data in marketing strategies.

We focus on high-quality, ethical research. We adhere strictly to the codes of conduct developed by ESOMAR.

The leading Internet publishers in Poland that make up PBI (Polish Internet Research), e.g. Gazeta.pl, INTERIA.PL, Onet.pl, Rzeczpospolita and Wirtualna Polska, use gemiusTraffic's results in their everyday activity.

Selected Clients:

Education/Counseling	Motorization	Banks	Joint-ventures
<ul style="list-style-type: none"> Law and Administration Department, University of Warsaw Higher School of Linguistics Business School of the Warsaw Technical University Academic Education Center C.K.A. PricewaterhouseCoopers Poland Sp. z o.o. 	<ul style="list-style-type: none"> Toyota Fiat Hyundai Nissan Peugeot Renault 	<ul style="list-style-type: none"> Raiffeisen BPH PKO BP mBank Multibank BZ WBK 	<ul style="list-style-type: none"> Polish Internet Research (Polskie Badania Internetu PBI) Interactive Advertising Bureau (IAB) Advertising Networks Consortium (Konsorcjum Sieci Reklamowych KSR)
Media	FMCG	Insurance companies	Telecommunication
<ul style="list-style-type: none"> Agora SA Onet.pl Wirtualna Polska Interia.pl Rzeczpospolita Canal+ 	<ul style="list-style-type: none"> Nestlé Unilever Carlsberg Tchibo Gillette Procter & Gamble 	<ul style="list-style-type: none"> Allianz Commercial Union ING Amplico Nationwide PZU 	<ul style="list-style-type: none"> Era Plus GSM