

Polish internet 2008/2009

www..pl

Warsaw, February 2009

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Introduction

The internet has been present in Poland for 18 years, however, it is not as developed as it is in wealthier, Western countries. Nevertheless, every year, the number of Poles using this medium is growing and, at the same time, the rate at which it increases is greater than in highly-developed countries. The web has increasingly more to offer, it is more often present in the life of everyday Poles and it engages them increasingly more often.

Numerous new web sites, including bold new internet projects set up by the traditional media, are creating a new space for advertising. It is estimated that last year about one billion Polish złoty (PLN) was spent on internet advertising. The Starlink media house has shown that by the end of the third quarter of 2008, internet expenses were greater than those for advertisements in daily newspapers, while the increase, in comparison with the previous year, amounted to 38 percent. Greater budgets were allocated only for television and magazines.

The aim of the present study is to present the landscape of the internet in Poland in the previous year. The report, supplemented by additional analyses and comments, brings together the results of the 2008 Gemius studies.

The detailed list of sources, which formed the basis for the creation of this report includes:

- Megapanel PBI/Gemius
- Net Track Millward Brown SMG/KRC
- gemiusTraffic

Gemius S.A. syndicate studies:

- Communities - Never Ending Friending
- Motivation, behaviour and opinions of blog authors and readers
- Media consumption
- Polish internet user behavioural profile
- Financial plans
- Social lending
- Internet CEE 2008
- E-commerce
- Internet users – consumers or prosumers?

Polish internet users

Polish internet users

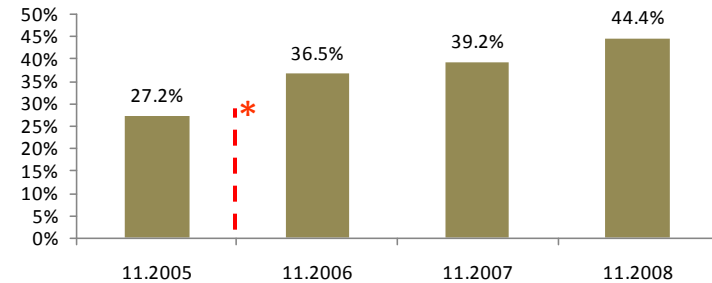
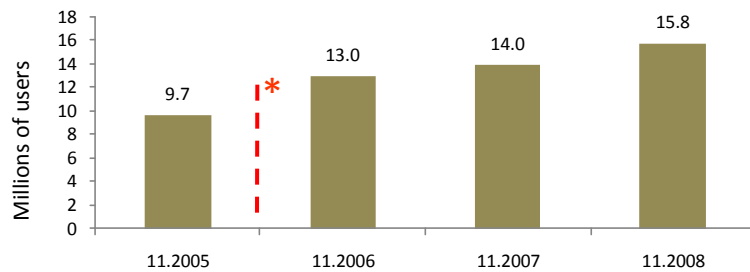
At the end of 2008, the number of Polish internet users amounted to 15.8 million, which equals 44.4 percent of all Poles in the 7+ age group. The increase in the number of internet users has been dynamic during the last few years. The change, in comparison with 2007, totals 13 percent, which puts Poland among such countries as the Czech Republic, Bulgaria, Latvia and Slovenia.

The internet is still most popular among young people and as many as 87 percent of people aged 16-24 use the web, while in the 55+ age group one finds the smallest number of internet users: only 11.5 percent. However, the age structure is subject to a gradual change, as increasingly more older people use the web.

The analysis of place of residence of internet users shows that invariably the internet is least available to residents of rural areas with only 30 percent of them using the web. Nevertheless, the changes which took place during the preceding years, result in the fact that gradually the internet user population structure, as far as place of residence is concerned, begins to resemble the general Polish population structure. However, with regards to level of education, it is people with secondary and higher education who still form the largest group among internet users.

What is more, the time that Poles spend browsing web sites is increasing. At present, this amounts to, on average, over 44 hours monthly. This means that the average Polish internet user surfs the net for over one hour and a half daily which is almost an hour more than in 2004. It is the younger age groups that spend the most time on the internet: about 2 hours daily.

Penetration: number and share of internet users in the population

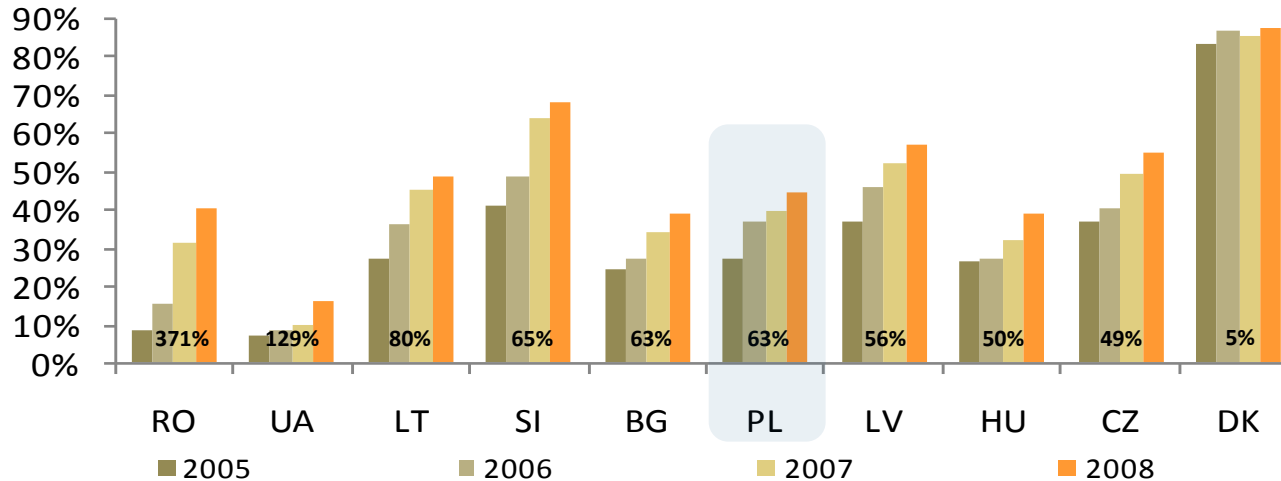


* Change of study methodology

During the last four years a systematic increase in the number of internet users has been registered. Since the end of 2005, the number of internet users increased by 6.1 million and, at present, the number amounts to 15.8 million, which equals 44.4 percent of the population aged 7+. In 2008 the increase in the number of internet users, in comparison with the preceding year, amounted to 13 percentage points.

Source: Megapanel PBI/Gemius, November 2005; Sample size N = 26,490; November 2006; Sample size N = 19,614; November 2007; Sample size N = 17,512; November 2008; Sample size N = 16,679. Studied group: 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

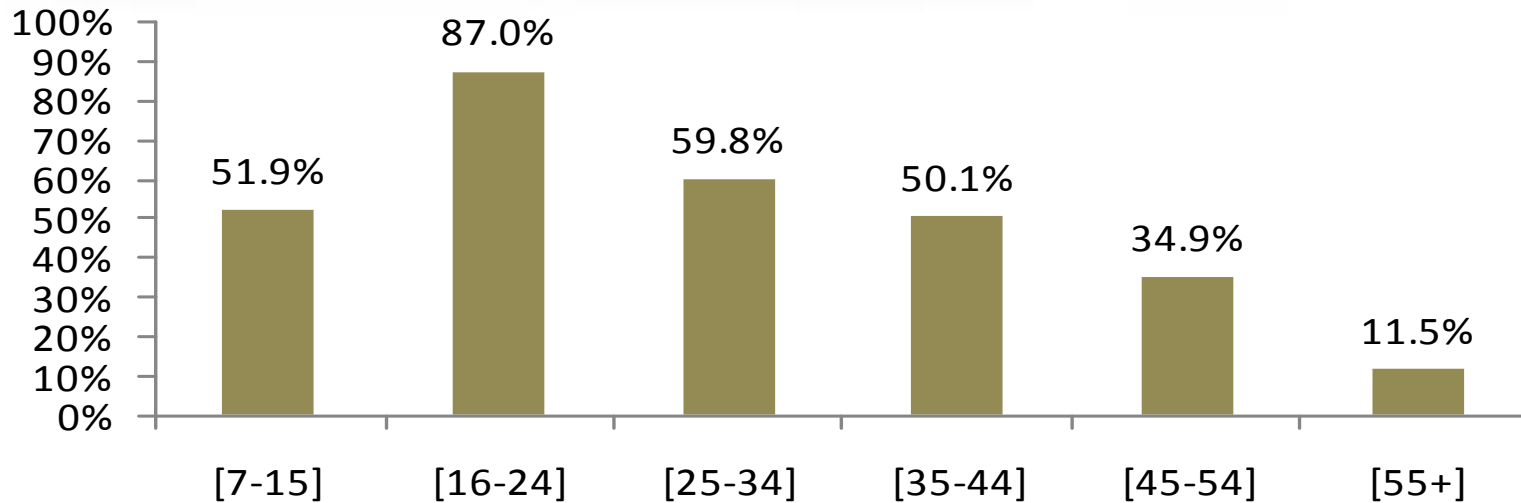
Penetration: user share, increase 2005-2008



The rate of increase of the number of Polish internet users during the last four years is characteristic of medium developed markets. In the countries where the internet is still developing, the increase in the number of internet users is incomparably higher and surpasses 100 percent; this is often the 'low base' effect. The Danish example proves this in the case of well-developed markets, a relatively low rate of increase (several percent) or even a stabilization of the penetration level may be registered, clearly indicating the saturation of the market.

Source: gemiusAudience: Ukraine (05-08), Hungary (05-08), Poland (05-08), Lithuania (05-08), Czech Republic (05-08), Bulgaria (08); Vitosha Research: Bulgaria (05); Eurostat: Bulgaria (06-07), Denmark (05-07); RIS: Slovenia (05-07); MOSS: Slovenia (08); CSB: Latvia (05-07); calculations Gemius: Romania (05-07); ITU: Romania (08).

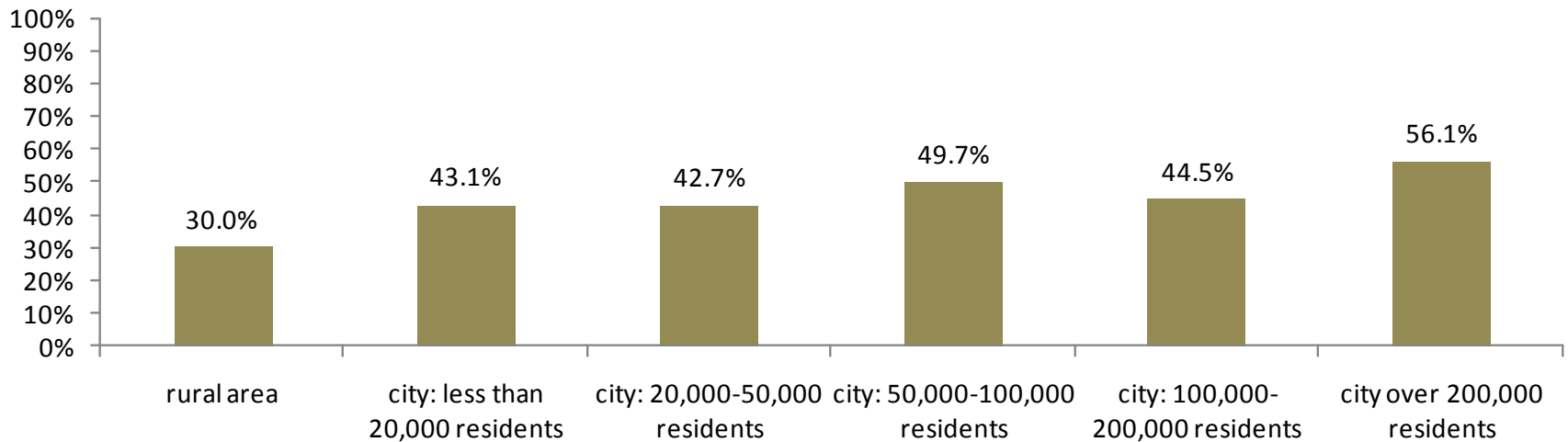
Penetration: chosen age groups



The internet mostly reaches young people aged 16-24 – 87 percent of them are web users. On the other hand, among the oldest age group (55 years and more), only 11.5 percent use the web.

Source: Megapanel PBI/Gemius, November 2008; Sample size N = 16,679. Studied group: 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study, Polish population data GUS (Central Statistical Office) 2008 [estimation].

Penetration: place of residence



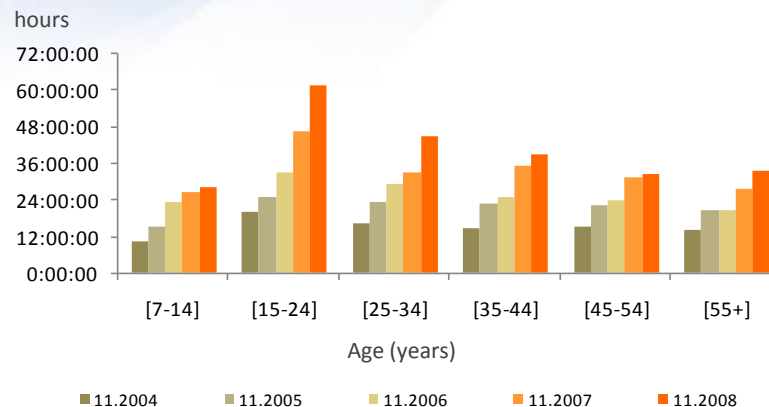
The lowest penetration level is registered in rural areas with only 30 percent of people who live in these areas using the web. On the other hand, a decidedly higher level is observed in medium-sized and large cities where the share of internet users surpasses 44.4 percent, which is the average for the whole country.

Source: Megapanel PBI/Gemius, November 2008; Sample size N = 16,679. Studied group: 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study, Polish population data GUS (Central Statistical Office) 2007.

Usage of the internet: time and number of page views

In November 2008, the average Polish internet user spent 44 hours on the internet monthly, which constitutes an average of almost one and a half hours daily. In comparison with 2004, this is almost an hour more per day. Moreover, in 2008, the average internet user, in a month, generated, on average, 2,000 more page views than five years ago.

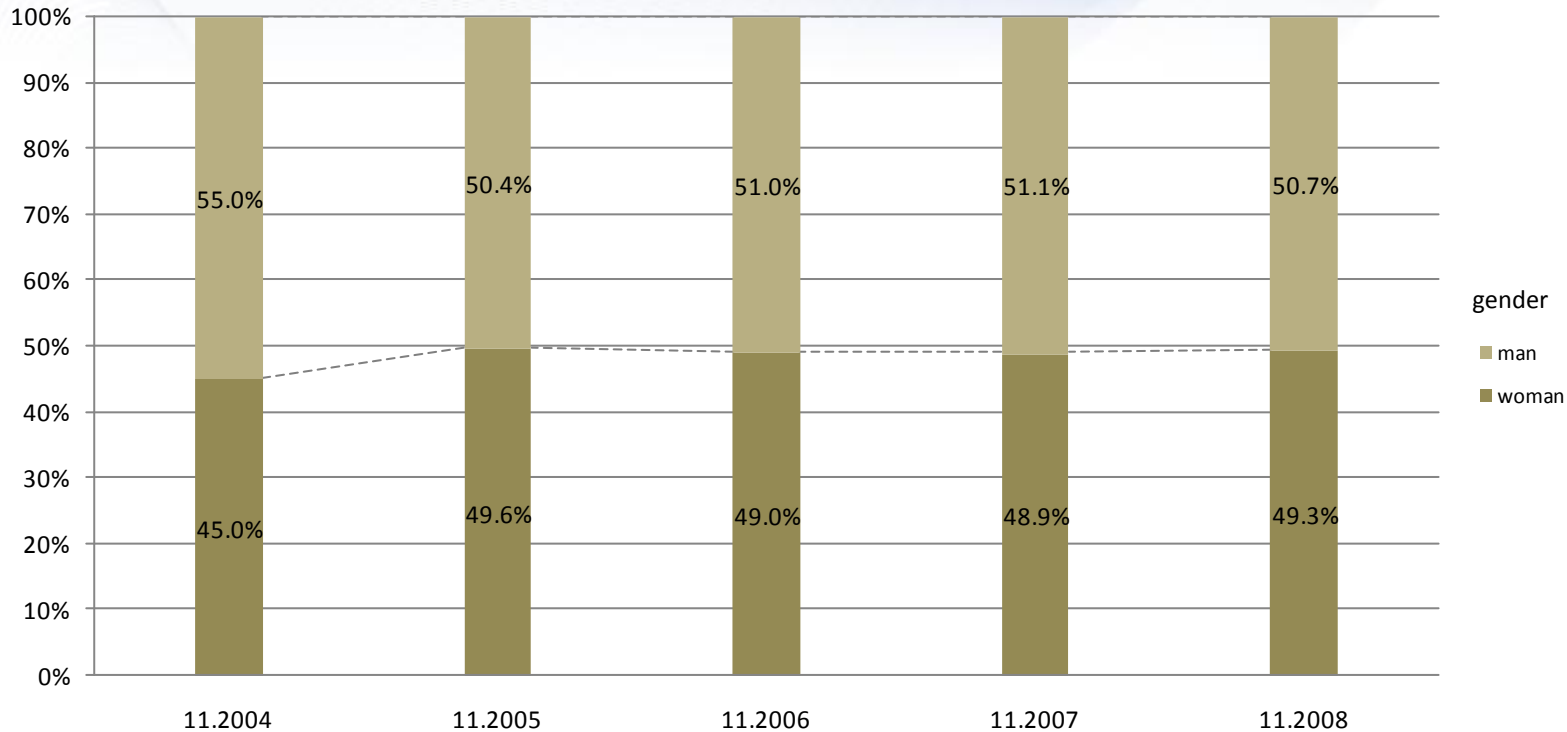
period	average monthly time per user	average daily time per user	average monthly number of page views per user
11.2004	16:27:22	0:32:55	929
11.2005	22:27:14	0:44:54	1358
11.2006	27:50:03	0:55:40	1653
11.2007	36:37:38	1:13:15	2279
11.2008	44:20:20	1:28:41	2915



Within the last few years, the time spent on the web has been systematically increasing in every age group. At present, it is young people aged 15-24 who spend decidedly the most amount of time on the internet: about two hours daily. This outcome surpasses the average time of internet usage by the average Polish internet user by about 30 minutes.

Source: Megapanel PBI/Gemius, November 2004; Sample size N = 17,510; November 2005; Sample size N = 26,490; November 2006; Sample size N = 19,614; November 2007; Sample size N = 17,512; November 2008; Sample size N = 16,679. Studied group: 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

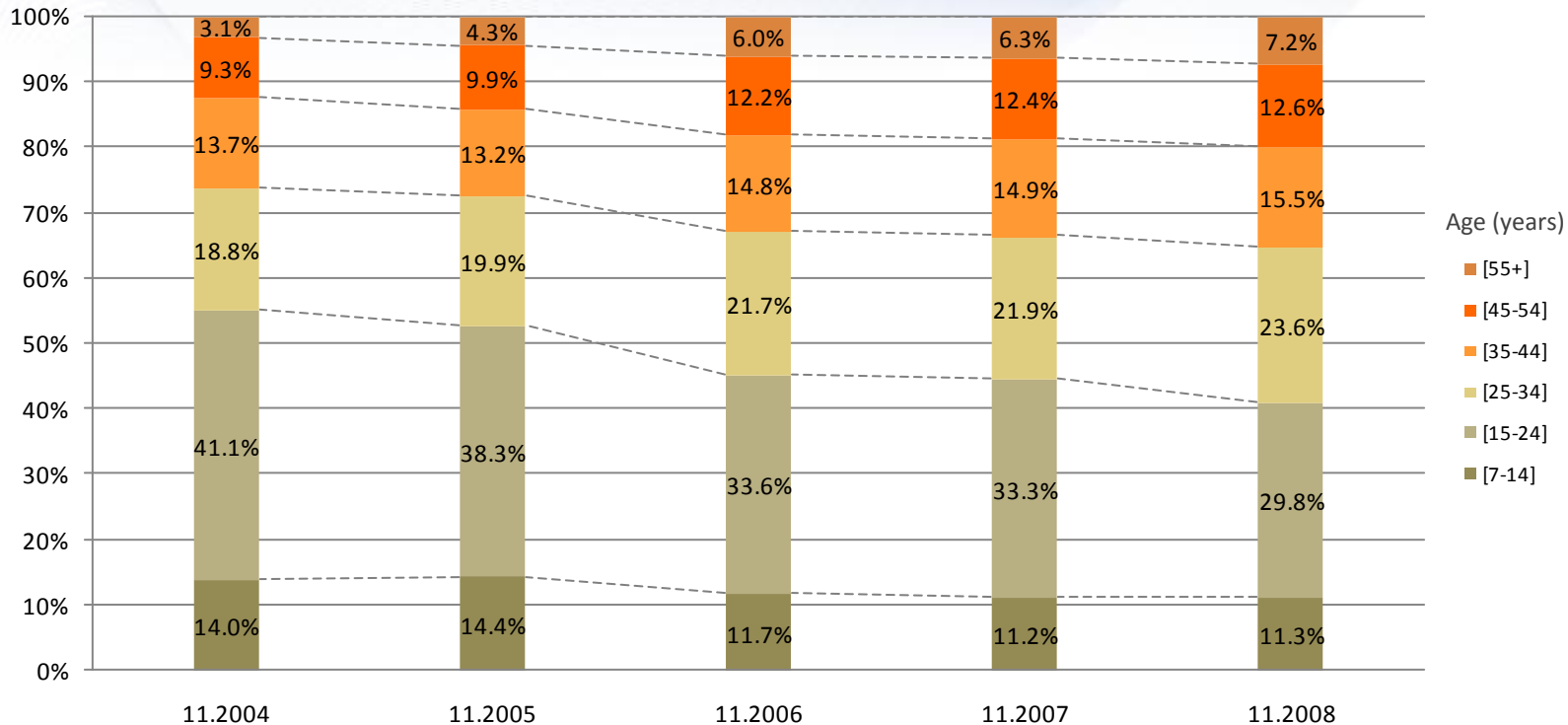
Socio-demographic profile: gender – trend



During the last few years the gender structure of the internet user group has remained stable. The share of men and women has become more or less equal, with a sustained minimal advantage of men using the internet.

Source: Megapanel PBI/Gemius, November 2004; Sample size N = 17,510; November 2005; Sample size N = 26,490; November 2006; Sample size N = 19,614; November 2007; Sample size N = 17,512; November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

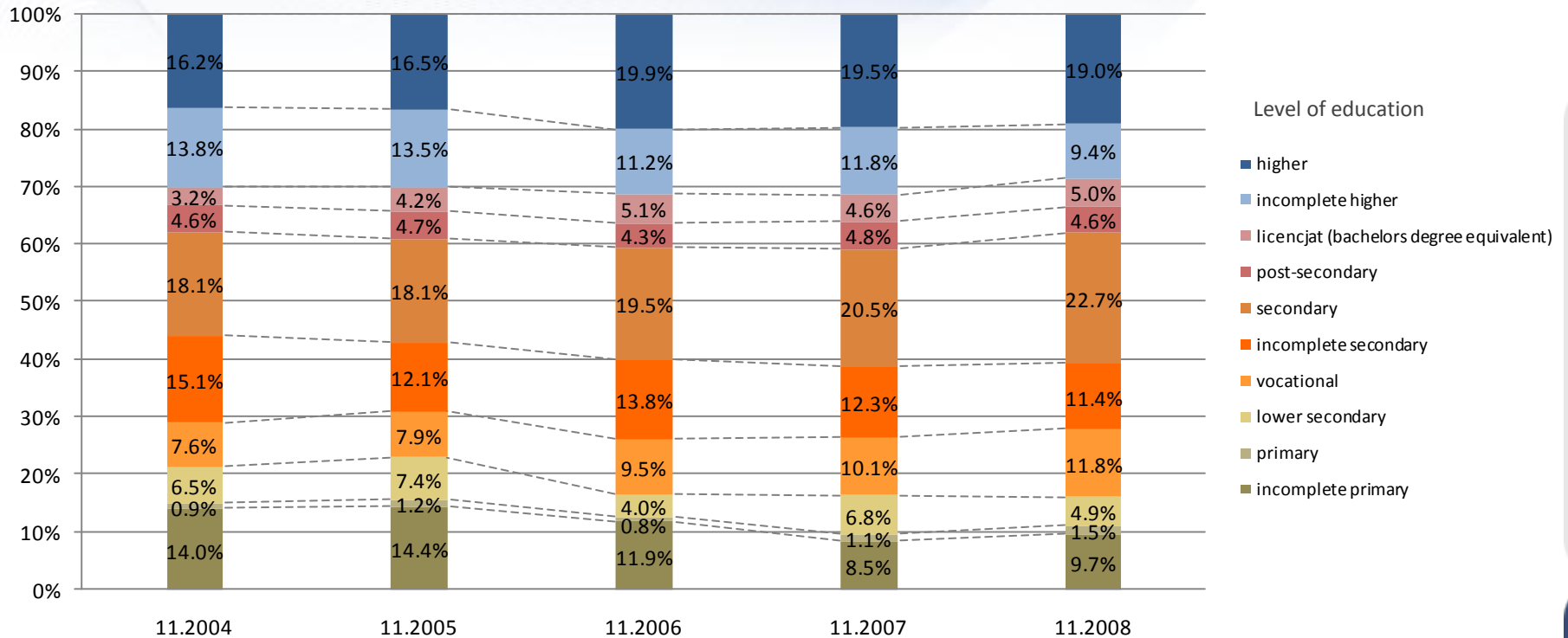
Socio-demographic profile: age – trend



The age structure of Polish internet users has changed during the last five years. In 2004, the internet was clearly dominated by young people, aged 15-24. Although they are still the largest group, their share has significantly diminished to the advantage of older users.

Source: Megapanel PBI/Gemius, November 2004; Sample size N = 17,510; November 2005; Sample size N = 26,490; November 2006; Sample size N = 19,614; November 2007; Sample size N = 17,512; November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

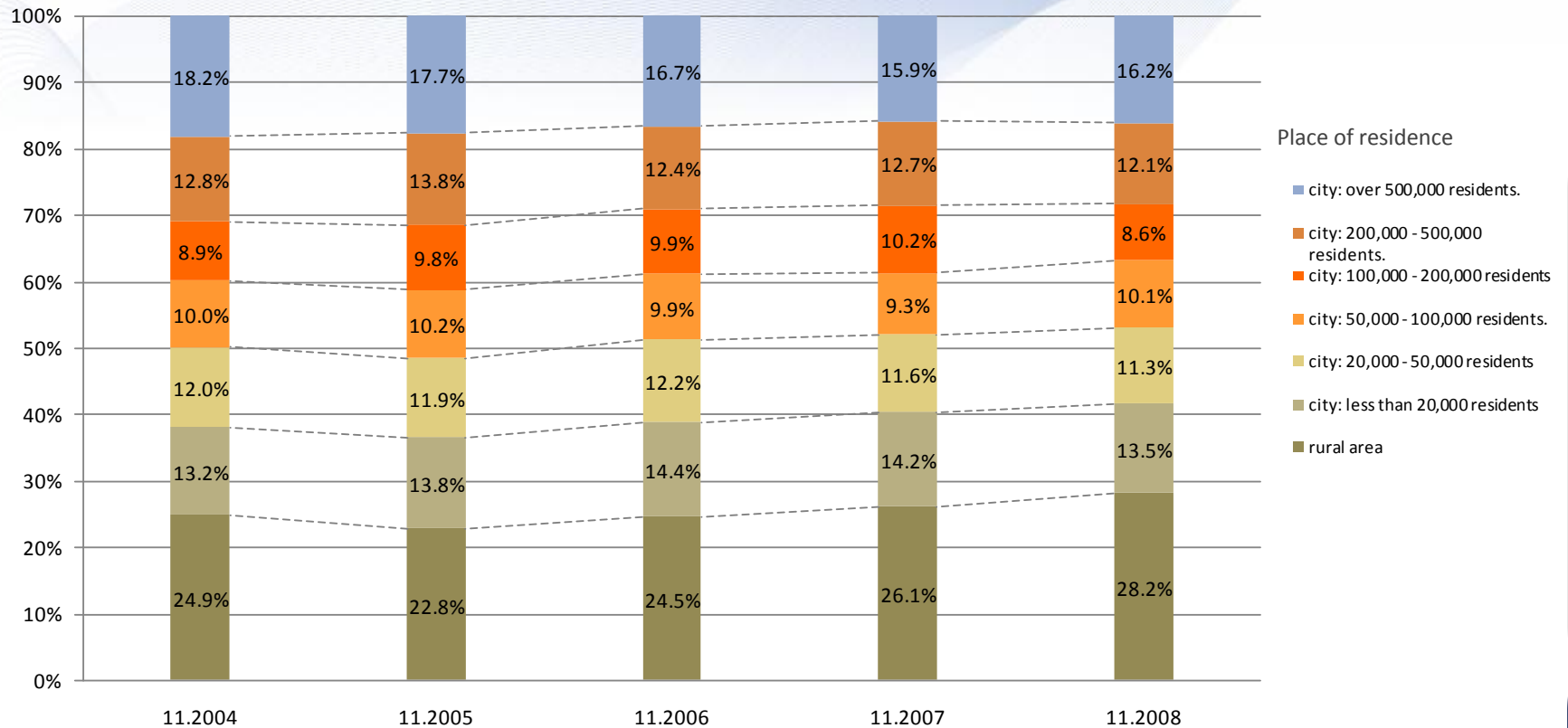
Socio-demographic profile: level of education – trend



Polish internet users are dominated by people with secondary education, which is a reflection of the entire population structure. Nevertheless, the high percentage of people with higher education indicates that the internet has not become a completely egalitarian medium yet.

Source: Megapanel PBI/Gemius, November 2004; Sample size N = 17,510; November 2005; Sample size N = 26,490; November 2006; Sample size N = 19,614; November 2007; Sample size N = 17,512; November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Socio-demographic profile: place of residence – trend



The profile of the Polish internet user, as regards place of residence, has not changed significantly with the passing of years. The internet user population begins to increasingly reflect the Polish population in general. The largest percentage of internet users are people living in rural areas and their share in the whole of the population is increasing. Another significant group among internet users are persons living in cities (over 500,000 inhabitants).

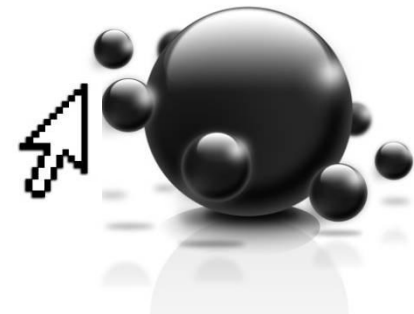
Source: Megapanel PBI/Gemius, November 2004; Sample size N = 17,510; November 2005; Sample size N = 26,490; November 2006; Sample size N = 19,614; November 2007; Sample size N = 17,512; November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Internet user tools

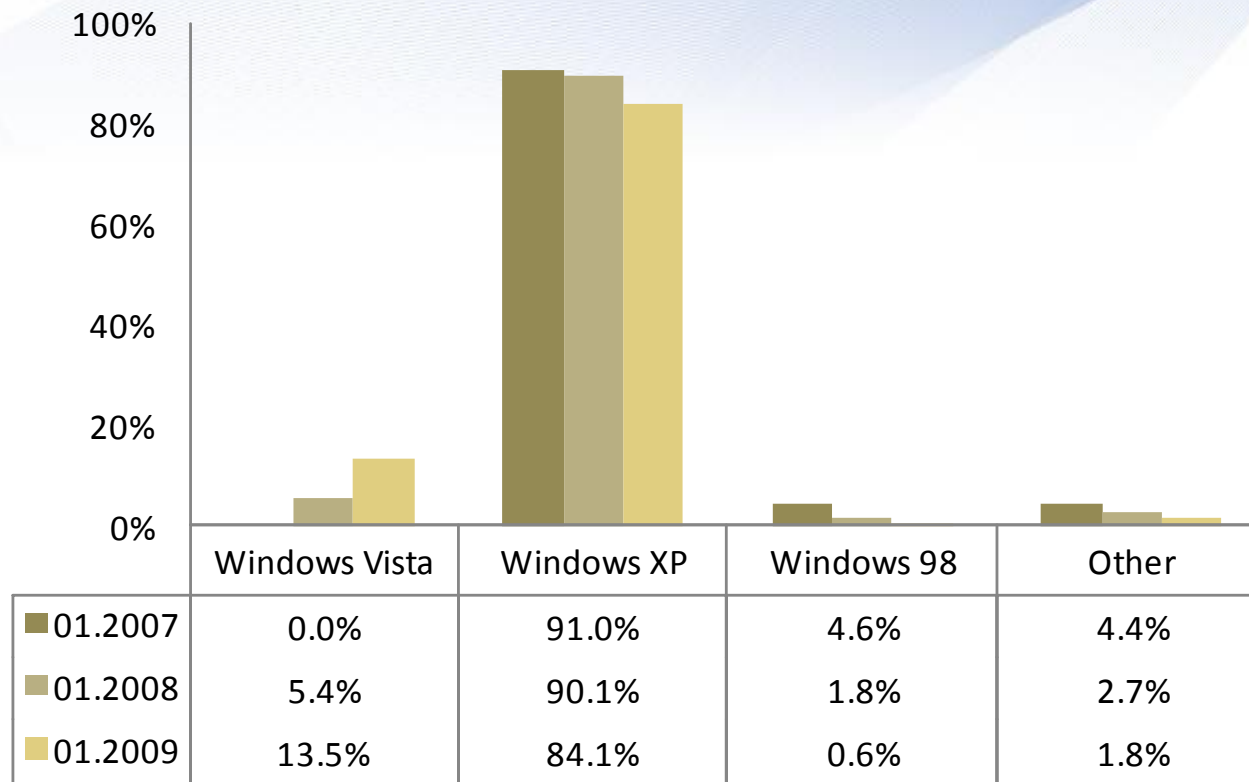
Internet user tools

In January 2009 most page views in Poland were generated by users of the Microsoft Windows XP operating system. Gradually, Microsoft Windows Vista has begun to gain popularity. The significance of other operating systems remains marginal.

The balance of forces on the Polish market is similar to that observed in most countries of the world. The predominance of Microsoft products is visible, however, on the other hand, a systematic increase of the popularity of the Mozilla Firefox web browser on the Polish market can also be observed.



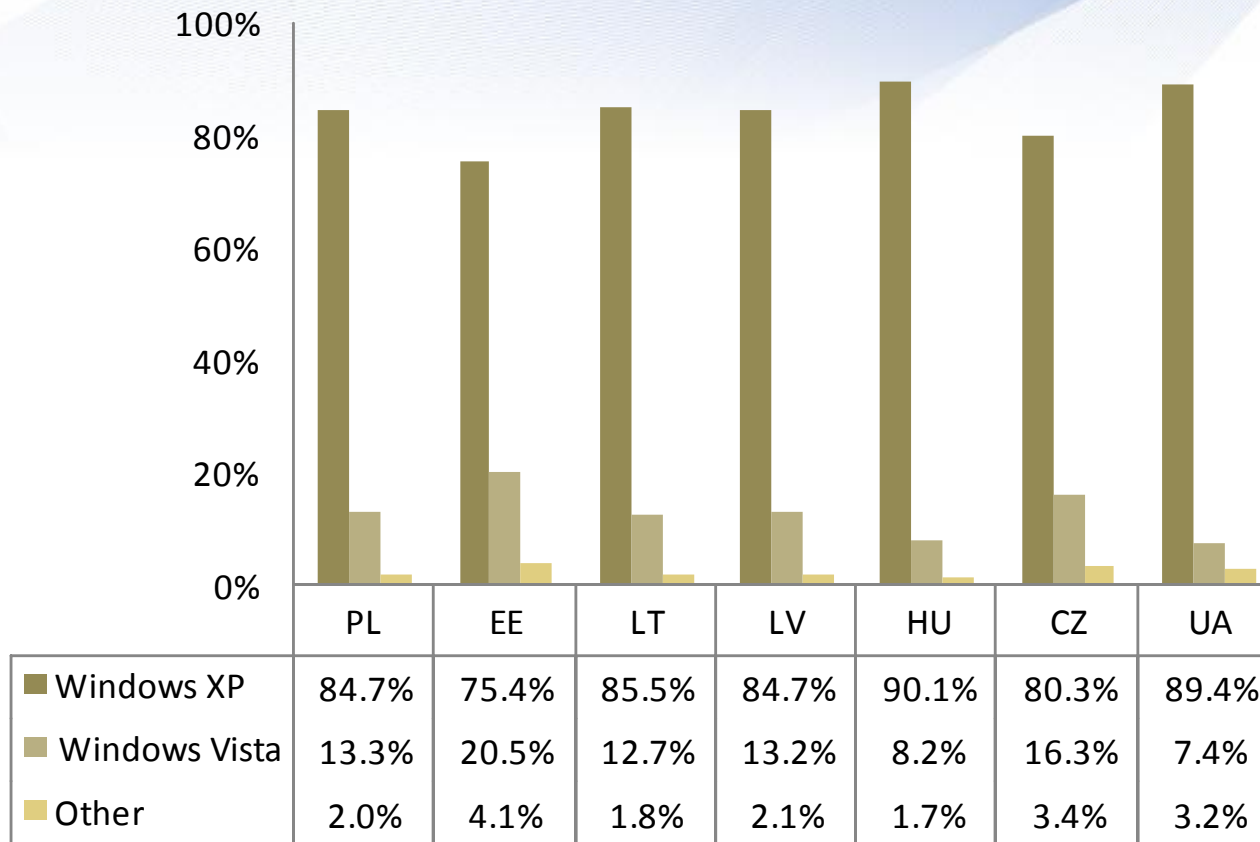
Operating systems



The popularity of Windows Vista among internet users is increasing and at the beginning of 2009, 13.5 percent of page views were generated by users of this system. The increase in the popularity of Windows Vista is taking place at the cost of Windows XP, which is still the most popular system on the market. The share of other operating systems is marginal.

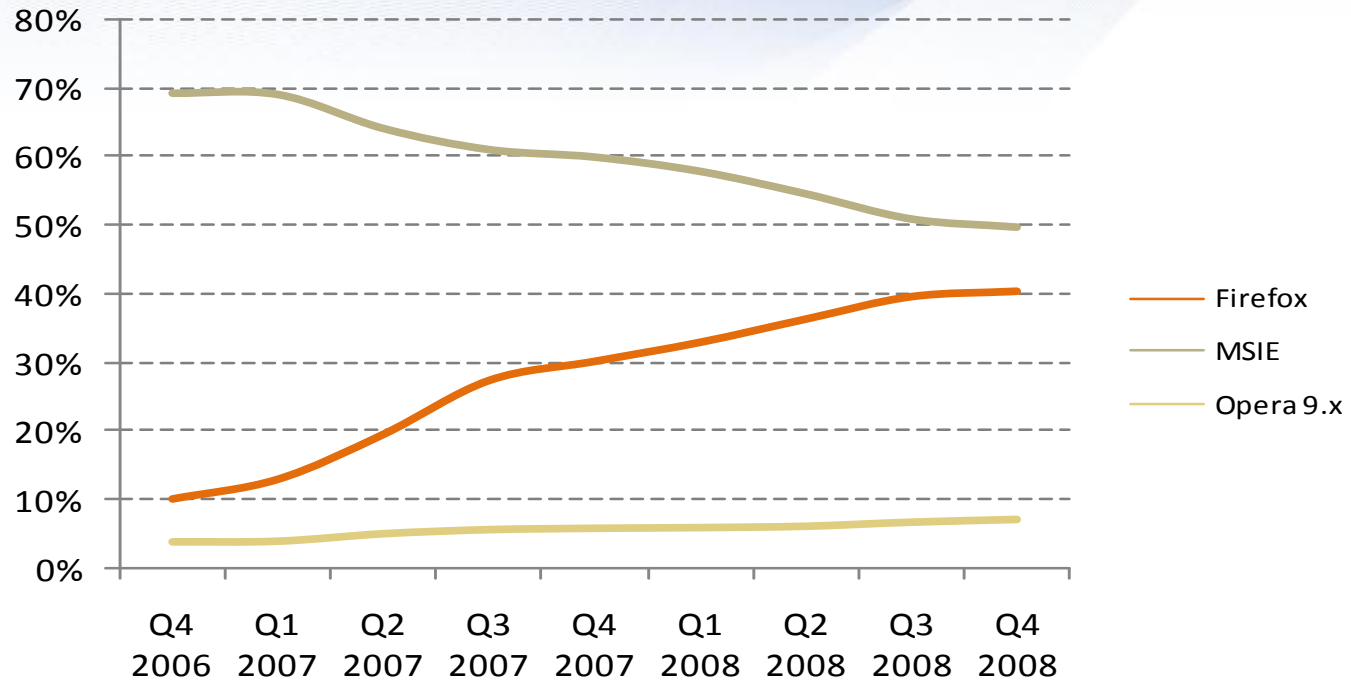
Source: Gemius SA, gemiusTraffic study, 01. 2007, 01. 2008, 01. 2009.

Operating systems: Poland vs. chosen CEE countries*



The distribution of the market share of particular operating systems does not differ significantly in the presented countries of the CEE region. Windows XP is still predominant, while an increase in the popularity of its successor has been observed. Windows Vista is most popular in Estonia, while it is least popular in Ukraine. Other operating systems still remain less popular.

Web browsers

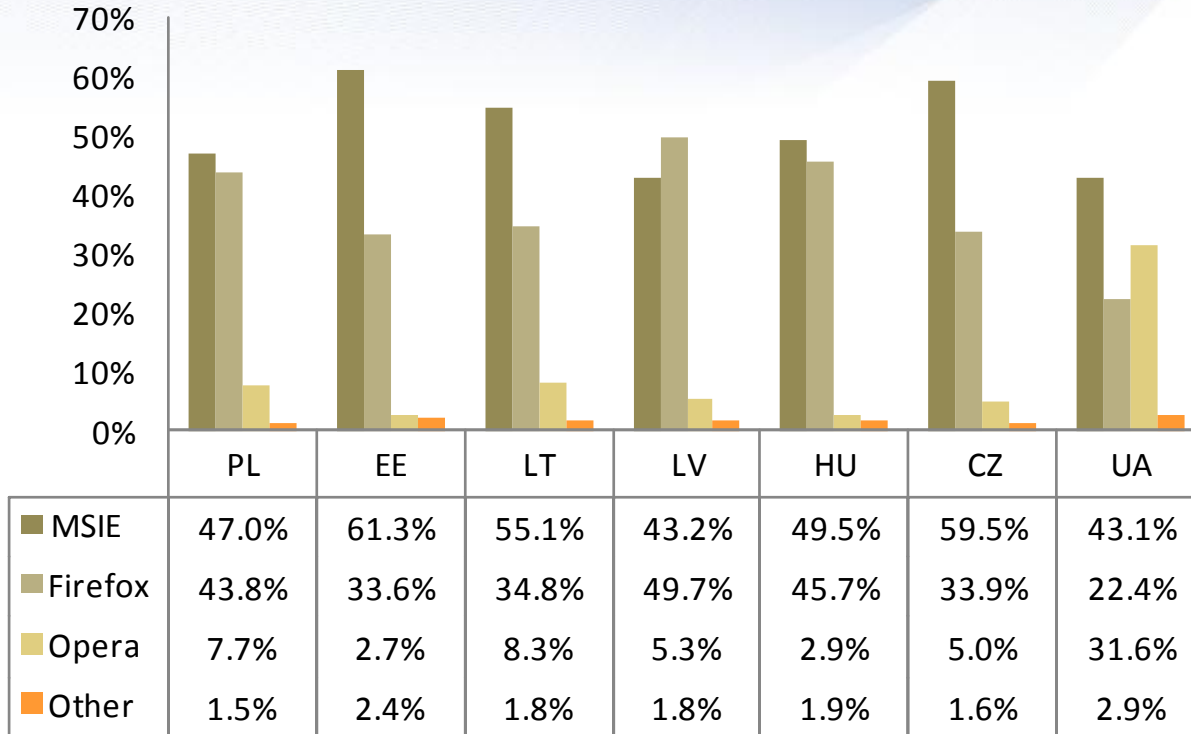


During the last two years, a fall in the popularity of Microsoft Internet Explorer, frequently used by beginner users, has been observed, while, at the same time, the Mozilla Firefox web browser, associated with more advanced users, has registered an increase in popularity. Perhaps 2009 will be a breakthrough year for Firefox products. Apart from the above, a fact worth noting is that, until now, Chrome, Google's web browser, did not even reach the 1 percent mark (about 0.7 percent in January).

Source: Gemius SA, gemiusTraffic study, data for quarters of 2006, 2007, 2008.



Web browsers: Poland vs. chosen CEE countries



In Poland, the trend observed in other CEE countries is maintained and the predominant web browser is Microsoft's Internet Explorer, although its advantage over Mozilla Firefox is relatively small. As seen on the previous slide, a trend leading to a change of the leader on the Polish market has been observed. Firefox has an advantage in Latvia with 49.7 percent of all generated page views being generated with the aid of this web browser. Moreover, the strong position of Opera on the Ukrainian market is also interesting: it is there that this browser is in second place in terms of popularity (a similar situation can be observed in Russia).

Source: Gemius SA, gemiusTraffic study, 30. 12. 2008 - 05. 01. 2009.



Significant places on the web

Significant places on the web

The top 20 most popular web sites did not change a great deal during the year. The three main players: Google, Onet.pl and Wirtualna Polska have maintained their positions. The greatest change in the top 20 was directly related to the appearance of the nasza-klasa.pl social networking web site. Between November 2007 and November 2008 this web site advanced from 15th to 4th place. What is more, two new web sites appeared in the leading group of web sites used in Poland: ceneo.pl and dobreprogramy.pl.

Google, which is still strengthening its position, remains the unquestionable leader among search engines and it is difficult to find any web site that might threaten the position of this search engine even to a small degree.

The proportional spread from the previous year has also been maintained among internet portals. Onet.pl is still the predominant with 63.1 percent reach. Other portals reach a smaller number of users and their reach oscillates between 44 and 55 percent.

As one may conclude from the top 20 information web sites, Polish internet users tend to access the news most often from these portals. The four most important players in the 'information' category of web sites are Onet.pl, Wirtualna Polska, Gazeta.pl, Interia.pl, These all maintained their positions from 2007. However, in 2008, a new competitor appeared amongst the leaders of the information market: tvn24.pl, part of the TVN group.

In 2008 Polish internet users quite often used maps and localizers. As far as reach is concerned, the leader on this market is the Google Maps, however, with only a slight advantage over the zumi.pl portal. On the other hand, in 2008, the latter had the largest number of page views among the five selected web sites with the greatest reach in the map and localizer category.



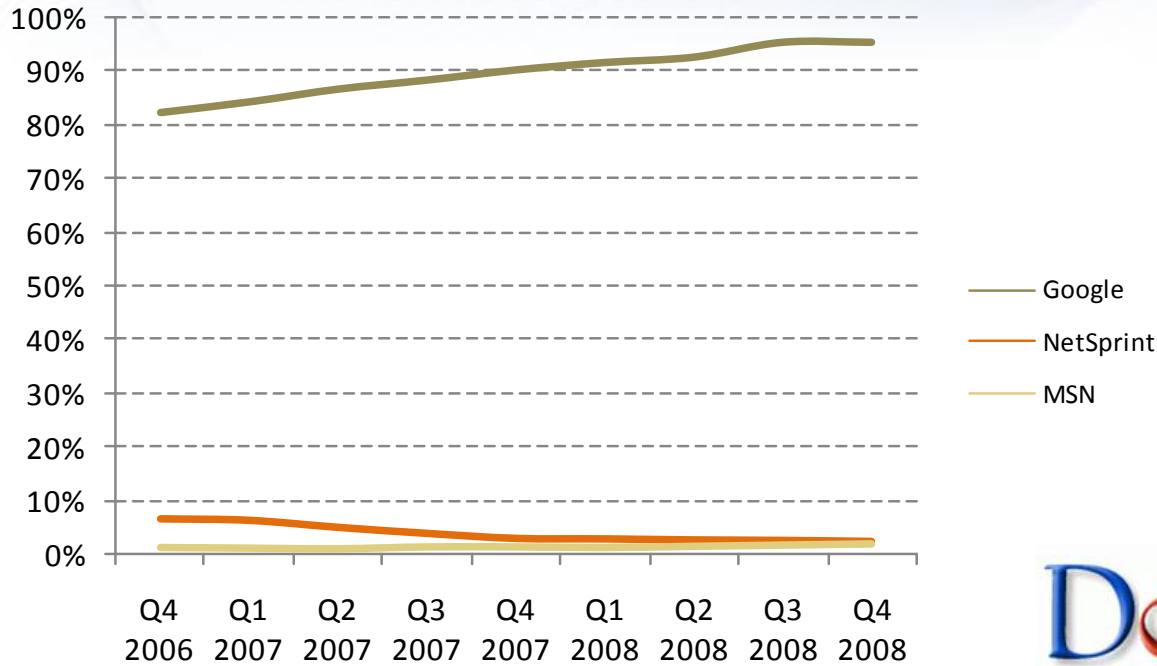
Top 20 most popular web sites according to reach

2007			2008			
1	Google	83.9%	1	Google	85.8%	
2	Onet.pl	68.3%	2	Onet.pl	63.1%	
3	Wirtualna Polska	57.1%	3	Wirtualna Polska	55.2%	
4	Allegro.pl	53.5%	4	nasza-klasa.pl	53.5%	▲
5	INTERIA.PL	49.3%	5	Allegro.pl	52.4%	▼
6	o2.pl	46.7%	6	INTERIA.PL	49.6%	▼
7	Gazeta.pl	44.2%	7	o2.pl	47.9%	▼
8	wikipedia.org	43.3%	8	Gazeta.pl	45.5%	▼
9	Microsoft	40.3%	9	youtube.com	45.3%	▲
10	youtube.com	38.9%	10	wikipedia.org	40.8%	▼
11	Gadu-Gadu group	29.5%	11	Microsoft	33.1%	▼
12	Fotka.pl group	29.0%	12	Gadu-Gadu group	24.5%	▼
13	IDG group	23.6%	13	mozilla.com	24.4%	▲
14	mozilla.org	23.6%	14	ceneo.pl	22.2%	▼
15	nasza-klasa.pl	23.3%	15	Fotka.pl group	21.0%	▼
16	Orange	20.0%	16	pf.pl	20.6%	▲
17	sciaga.pl	19.7%	17	IDG group	19.0%	▼
18	pf.pl	19.5%	18	Medousa.pl group	18.9%	▲
19	otoMoto	19.0%	19	dobreprogramy.pl	18.8%	▼
20	Medousa.pl group	18.8%	20	sciaga.pl	18.5%	▼

In November 2008 no changes had been registered among the three most popular web sites, as compared with the previous year. Worth noting, however, is the rise in position of nasza-klasa.pl's, which during the past year, has advanced from 15th to 4th position. Other changes in the table are caused by the increase of popularity of two web sites: ceneo.pl and dobreprogramy.pl.

Source: Megapanel PBI/Gemius, November 2007; Sample size N = 17,512; November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Search engines



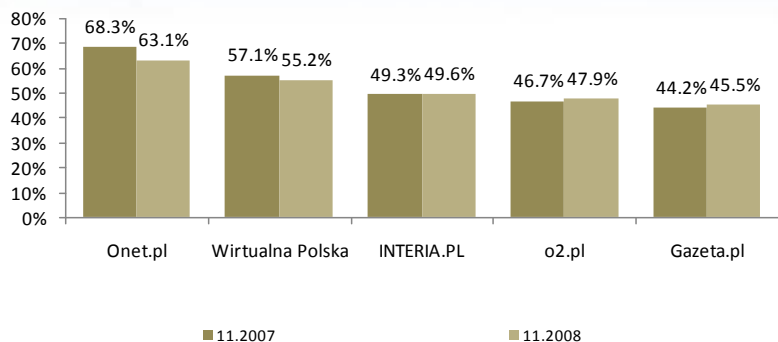
Dominator

Google invariably remains the unquestionable leader on the search engine market and its position is growing all the time.

Source: Gemius SA, gemiusTraffic study, data for the quarters of 2006, 2007, 2008.

Portals

reach



Statistics for the five most popular web sites according to reach:

2008		
	monthly page views	monthly time [hrs]
Onet.pl	3 536 345 407	62 459 223
Wp.pl	2 224 527 969	42 831 820
Interia.pl	1 161 923 830	26 412 598
o2.pl	1 163 912 936	29 383 843
Gazeta.pl	674 397 579	12 647 272

During the last year, the order in which the portals appeared did not change. Onet.pl remains the leader in the category, although its reach has decreased by 5 percentage points. Other portals are viewed by a smaller number of users and their reach oscillates between 44 and 55 percent.

Source: Megapanel PBI/Gemius, November 2007; Sample size N = 17,512; November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Information

Statistics for the five most popular web sites according to reach:

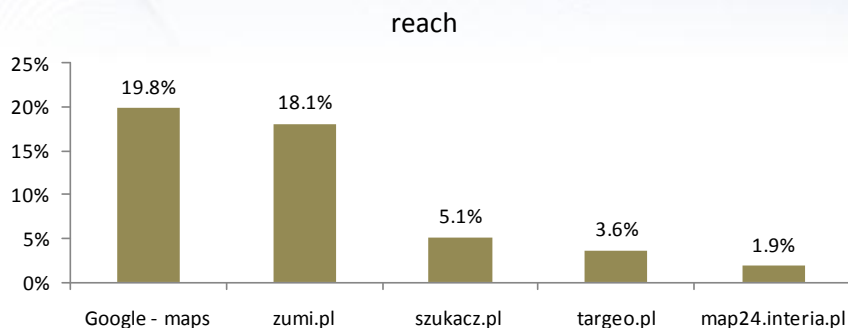
2007			
	Monthly reach	Monthly page views	Monthly time [hrs]
Onet.pl – information web site	36.0%	291 281 843	5 892 070
Wp.pl – information web site	23.2%	114 885 717	2 064 936
Gazeta.pl – information web site	20.4%	78 806 167	1 798 851
Interia.pl – information web site	16.4%	72 478 785	1 096 452
o2.pl – information web site	9.6%	14 272 606	367 419

2008			
	Monthly reach	Monthly page views	Monthly time [hrs]
Onet.pl – information web site	29.4%	228 742 261	4 739 187
Wp.pl – information web site	24.9%	138 526 733	2 700 282
Gazeta.pl – information web site	20.4%	92 423 226	2 141 138
Interia.pl – information web site	17.4%	78 367 137	1 163 765
tvn24.pl	13.3%	48 681 339	1 529 851

The Polish internet user gains information most often from portals. In the category of information web sites, the four most important players maintained the positions they occupied in November 2007. However, in 2008, a competitor, tvn24.pl, part of the TVN group appeared among the leaders of the information market. It gained 13.3 percent reach and is now in the fifth position. A similar tendency is observed upon analysing data concerning page view number and the monthly time spent on particular web sites.

Source: Megapanel PBI/Gemius, November 2007; Sample size N = 17,512; November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Maps and localizers



Statistics for the five most popular web sites according to reach:

2008		
	monthly page views	monthly time [hrs]
google - maps	9 390 908	375 215
zumi.pl	27 039 725	628 734
szukacz.pl	2 938 197	1 447 265
targeo.pl	3 727 289	80 073
map24.interia.pl	12 863 020	89 918

Many internet users appreciate the usefulness of maps and localizers. As far as reach is concerned, the leader on this market is Google Maps, however with only a small advantage over zumi.pl, which generates significantly more page views per month. However, with regard to the time spent on a web page, the leader among the chosen sites is szukacz.pl, where internet users spent 1,447,265 hours in November 2008.

Source: Megapanel PBI/Gemius, November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Web 2.0

Web 2.0

One can observe the development of the same trends which occur on other, more developed markets also on the Polish market. Above all, the increasingly higher activity of Polish internet users on web 2.0 web sites has been registered. It is on such web sites where users actively co-create and develop web content.

Social networking web sites

Social networking web sites are extremely popular, with the most popular being nasza-klasa.pl (53.5 percent reach, placing it in fourth position as regards popularity of web sites in Poland). One ought to mention that the dynamic development of this portal in 2007 slowed down somewhat and, after exceeding 50 percent reach, the increase in the number of users has become much slower. Other portals remain far behind the leader and their reach oscillates around several percent. Nasza-klasa.pl also has the largest number of page views, exceeding 10 billion per month, which significantly surpasses the values generated by users of other web sites.

The great number of page views of internet users is characteristic of such web sites and indicates the significant engagement of the visitors. The social networking web site users under study declare that sending messages, looking through profiles as well as evaluating and commenting are the most frequent activities on such web sites.

Blogs

Among the blogging web sites on the Polish market there is no unequivocal leader as far as reach is concerned. Four web sites: [BlogOnet](http://BlogOnet.pl), [Blox](http://Blox.pl), [Blogger](http://Blogger.pl) and [Bloog](http://Bloog.pl) have a reach of a dozen or so percent. However, according to the number of page views one can observe the visible predominance of [BlogOnet](http://BlogOnet.pl), which generates over 77 million page views per month.

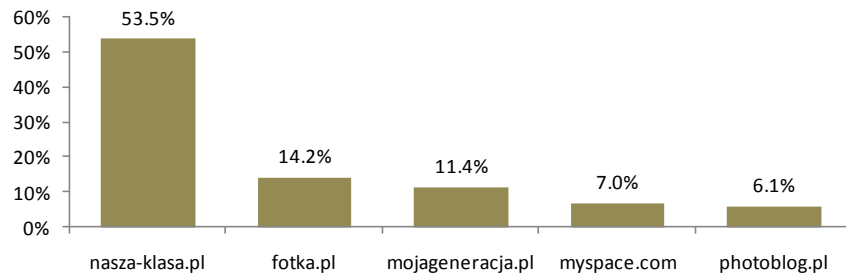
Social shopping and citizen journalism

One of the newest trends currently observed on the internet in Poland is the appearance of a phenomenon connected with e-commerce, so-called social shopping. This includes a combination of online shops together with a system of an active social network developed for the optimization of the purchases made. With these web sites users can learn about the most profitable offers and discounts and read other internet user opinions on selected products.

So-called citizen journalism is gaining increasingly more popularity (although still none of these web sites has more than 4 percent reach). The idea behind citizen journalism is to provide each citizen with the possibility of publishing one's own articles and participating in the creation of information web sites.

Social networking web sites: the five most popular web sites according to reach

reach



Statistics for the five most popular web sites according to reach:

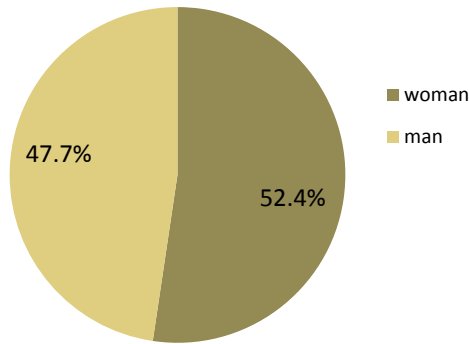
2008		
	Monthly page views	Average time per user [hrs:min:s]
nasza-klasa.pl	10 982 130 330	12:55:32
fotka.pl	1 491 784 759	05:43:06
mojageneracja.pl	18 898 384	00:36:01
myspace.com	43 719 640	00:40:16
photoblog.pl	195 689 937	03:15:34

* The components of internet community node, with the exclusion of blogs and internet forums, were taken into account in the comparison.

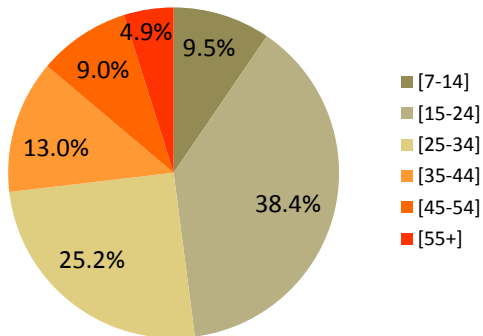
The unquestionable leader among social networking web sites is nasza-klasa.pl, whose reach amounted to 53.5 percent in November 2008. To compare, the reach of the web site in second position, fotka.pl, was 14.2 percent. Nasza-klasa.pl also has the greatest number of page views, exceeding 10 billion per month, which significantly surpasses the values generated by users of other sites of this type. Among the foreign web sites, myspace.com has the greatest reach.

Source: Megapanel PBI/Gemius, November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Social networking web sites: demographic structure of the five most popular web sites according to reach



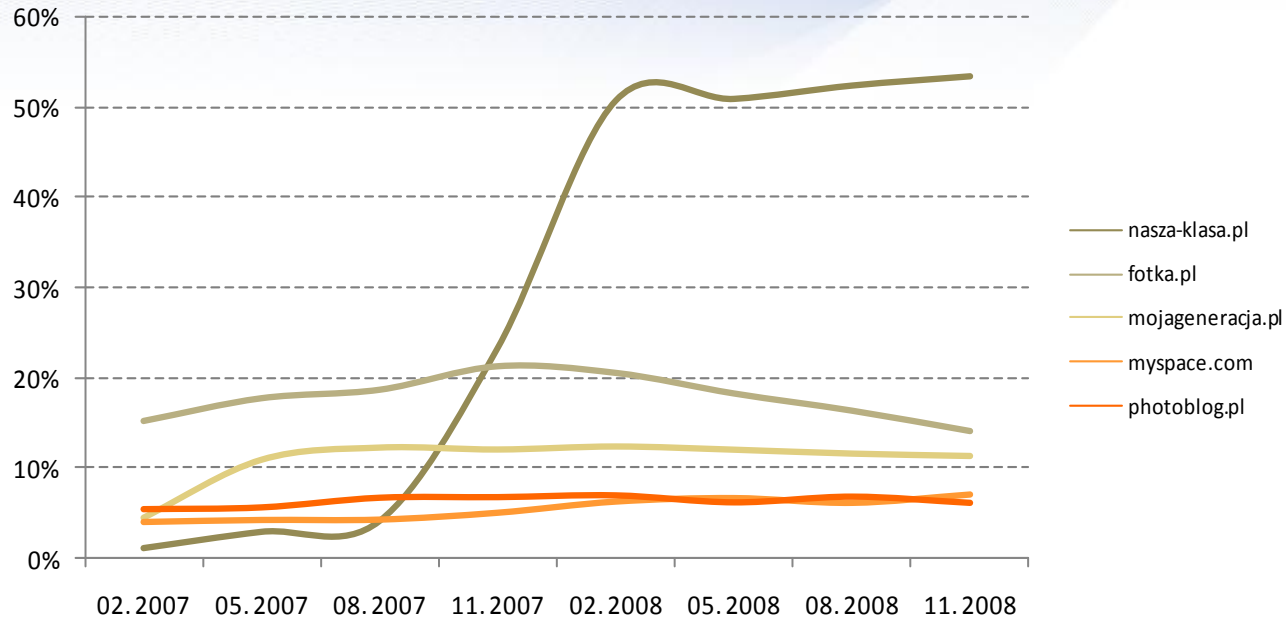
Women predominate among the users of the five selected social networking web sites. These web sites are also most often visited by young people aged 15-34 and this group is also dominated by women. However, among users over 35 years of age there are significantly more men than women.



age/gender	woman	man	total
[7-14]	3.9%	5.7%	9.6%
[15-24]	22.1%	16.3%	38.4%
[25-34]	14.6%	10.7%	25.2%
[35-44]	5.9%	7.2%	13.0%
[45-54]	4.2%	4.8%	9.0%
[55+]	1.8%	3.1%	4.9%
total	52.4%	47.7%	100.0%

Source: Megapanel PBI/Gemius, November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Social networking web sites: trends in Poland

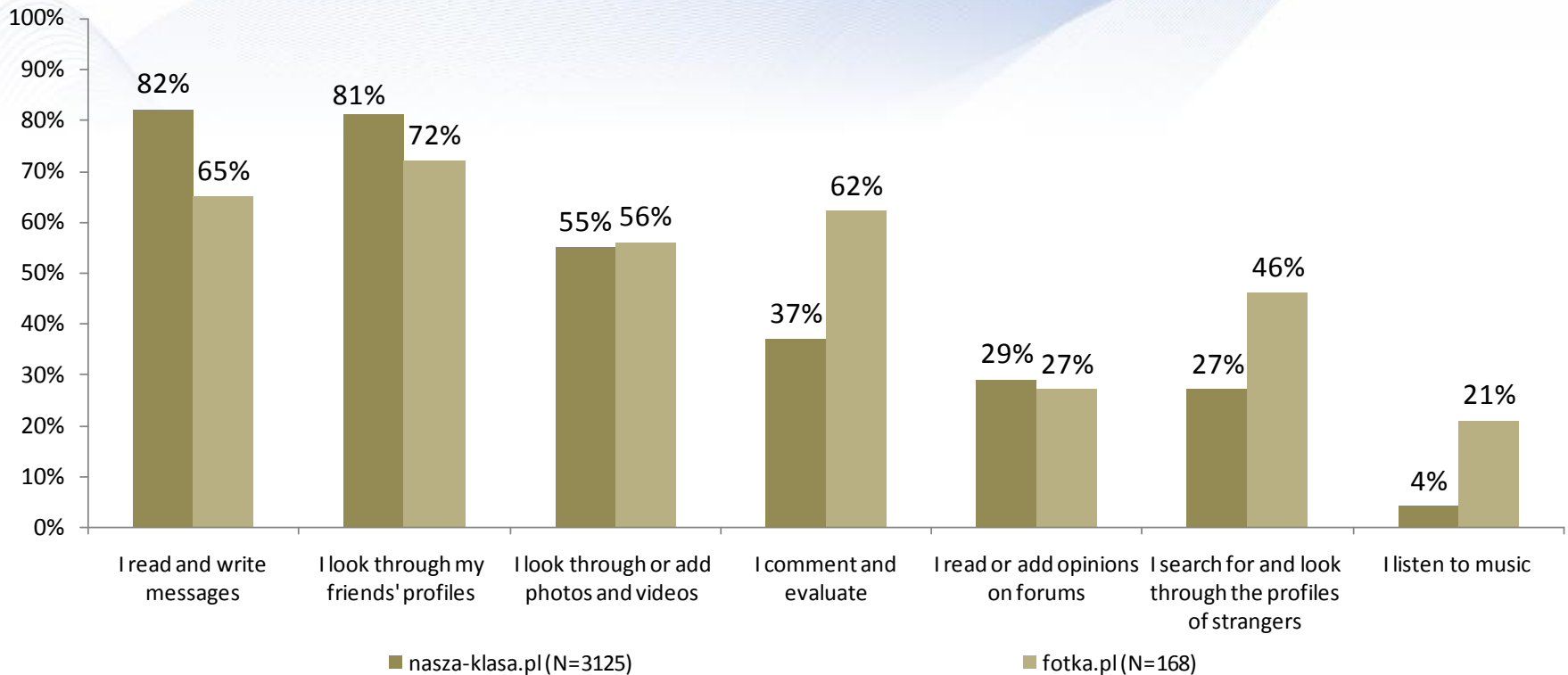


The greatest increase in popularity may be observed in the case of *nasza-klasa.pl*, which already by the end of 2007 was the leader among the social networking web sites. However in 2008, after exceeding 50 percent reach, a halt in the rate of increase is visible and reach is maintained at a stable, high level. Other web sites are characterised by a significantly lower rate of increase, or even, as in the case of *fotka.pl*, a gradual loss of popularity.

Source: Megapanel PBI/Gemius, February 2007; Sample size N = 20,479 ; May 2007; Sample size N = 19,100; August 2007; Sample size N = 18,789; November 2007; Sample size N = 17,512; February 2008; Sample size N = 18,838; May 2008; Sample size N = 17,740 ; August 2008; Sample size N = 17,120 ; November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study. Polish population data: GUS (Central Statistical Office).

Activities performed on social networking web sites

What do you usually do on a social networking web site? Indicate all correct answers:



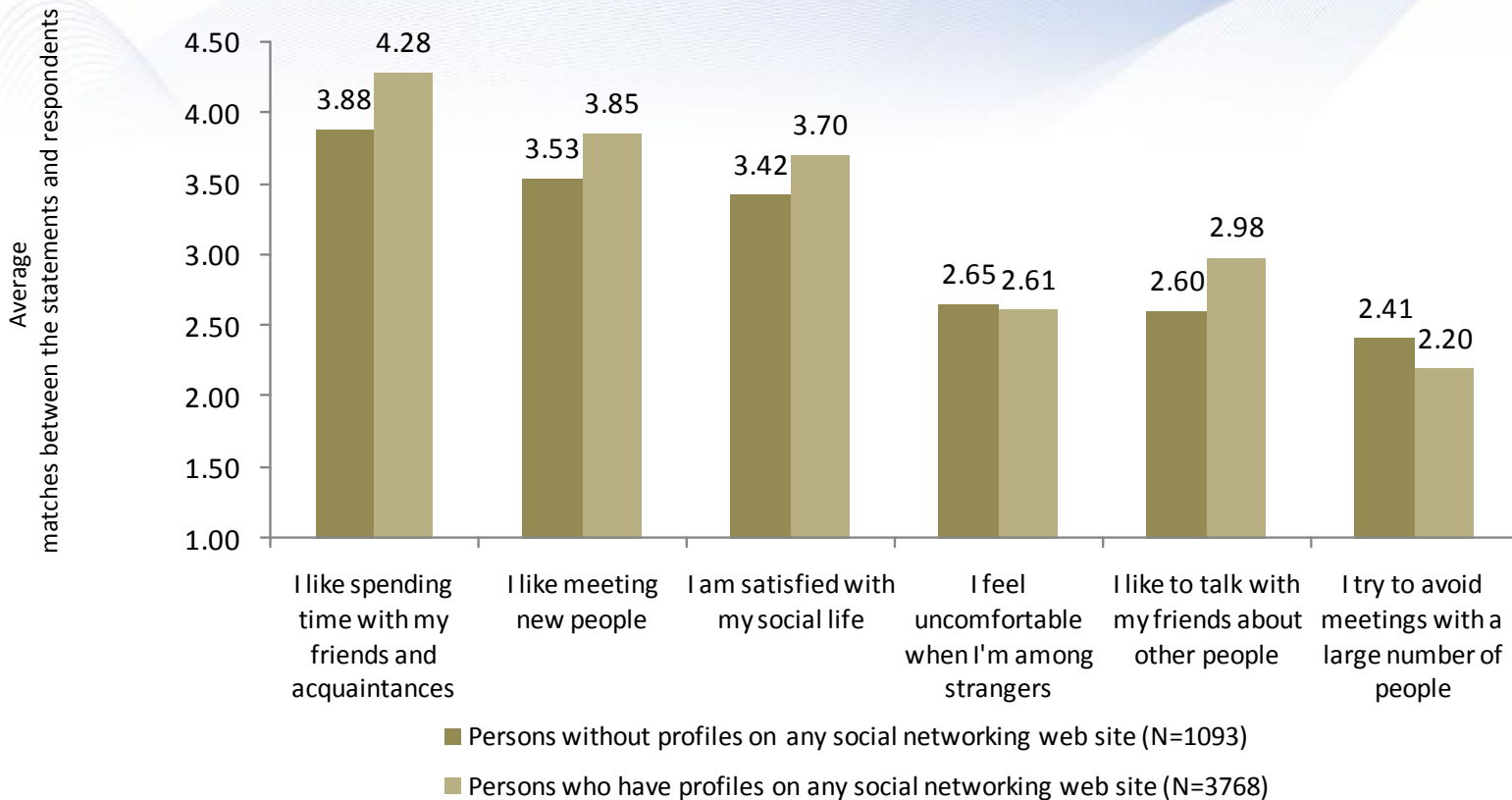
The percentages do not total 100 percent, as the respondents could indicate more than one answer.

Social networking web site users use these web sites, above all, to communicate with each other and browse through their friends' profiles. The characteristic activity for those who have a profile on nasza-klasa.pl is a high frequency of browsing through friends' profiles, as well as sending and receiving messages. Fotka.pl is also used for these purposes, however, fotka.pl users significantly more often comment and evaluate each other's profiles. Another distinctive feature of fotka.pl is searching for and browsing through the profiles of unknown users, which probably makes it a more attractive place for making new acquaintances.

Source: gemiusReport, *Communities - Never Ending-Friending 2008*; Sample size N= 5,105. Base: all respondents; Studied group internet users aged 15+; In the study, demographic structure data from the Omnibus PBS study were used.

Usage of social networking web sites vs. relations with people

To what extent do the statements below match your personality? (Scale: 1 – It completely does not match to 5 – Definitely matches)

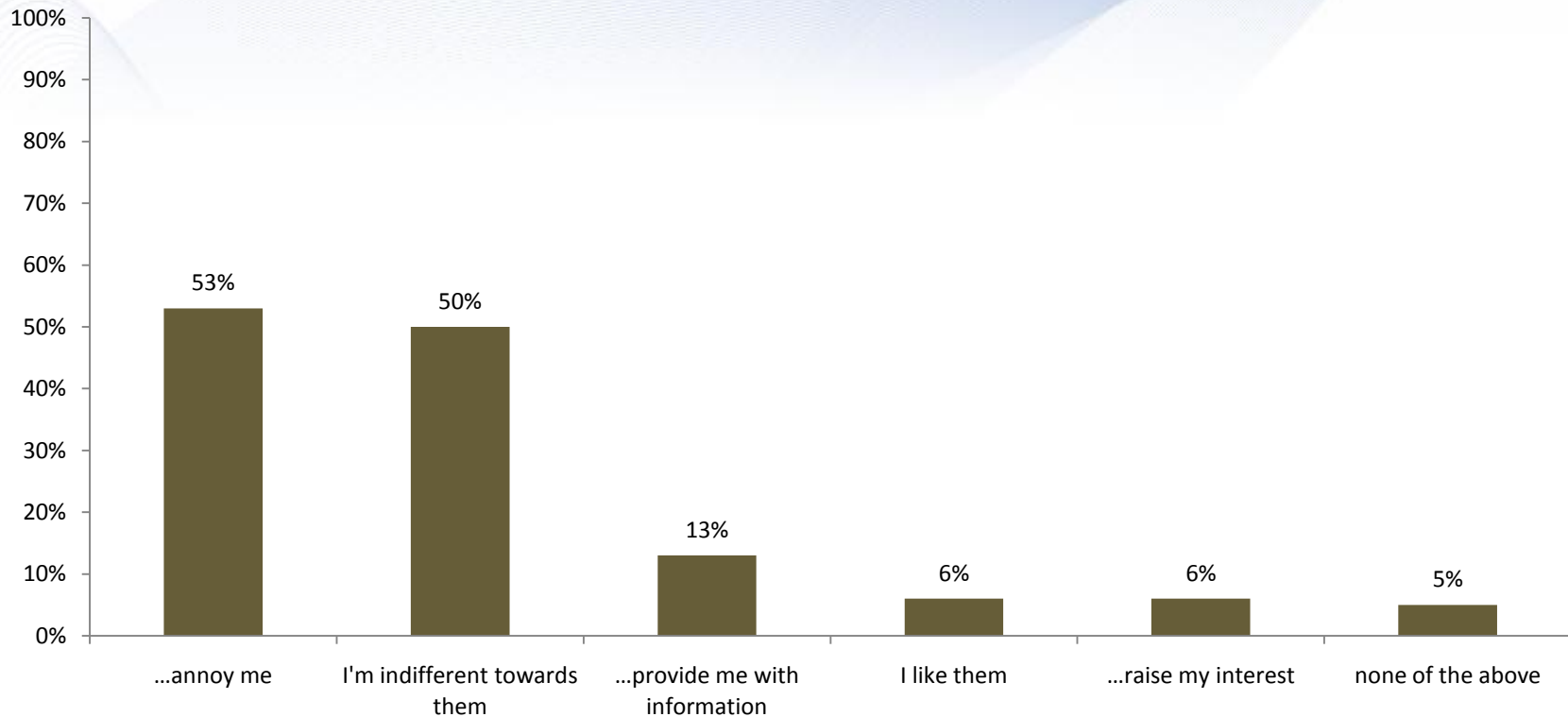


The average matches between particular statements and respondents indicate that people who have a social networking web site profile more often declare their openness in contacts with other people and a positive attitude with regards to spending time with friends and family than the remaining group of internet users. Thus, it may be assumed that people who have profiles on social networking web sites are more open to relations with other people. On the other hand, such web sites, through their unquestionable shortening of distances in broadly defined social relations, facilitate making new acquaintances and maintaining relationships that already exist at the same time developing needs related to interpersonal contacts in their users.

Source: gemiusReport, *Communities - Never Ending-Friending 2008*; Sample size N= 5,105. Base: all respondents; Studied group: internet users aged 15+; In the study, demographic structure data from the Omnibus PBS study were used.

Attitude towards advertisements on social networking web sites

Indicate the statements you agree with. Advertisements on social networking web sites I visit...



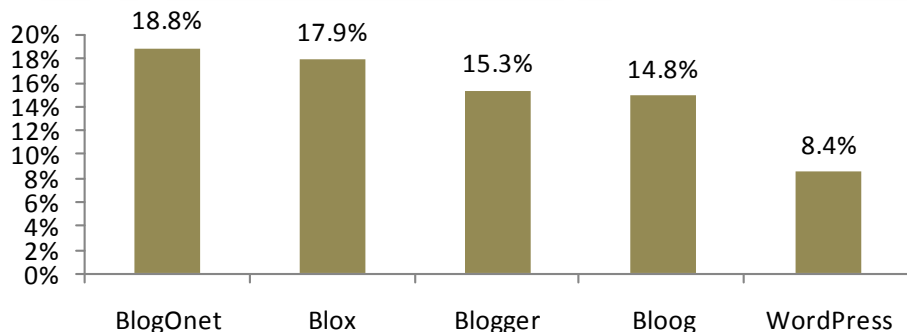
The percentages do not total 100 percent, as the respondents could indicate more than one answer.

Almost 50% of social networking web site users declare their dislike or indifference to advertisements on such web sites. A little more than one-tenth of them believe that such advertisements are informative. The smallest number of social networking web site users likes these advertisements or thinks that they are interesting (only 6 percent).

Source: gemiusReport, *Communities - Never Ending-Friending* 2008; Sample size N=3,774; Base: respondents registered on social networking web sites; Studied group internet users aged 15+; In the study, demographic structure data from the Omnibus PBS study were used.

Blogosphere: reach, time and page views

reach



Statistics for the five most popular web sites according to reach:

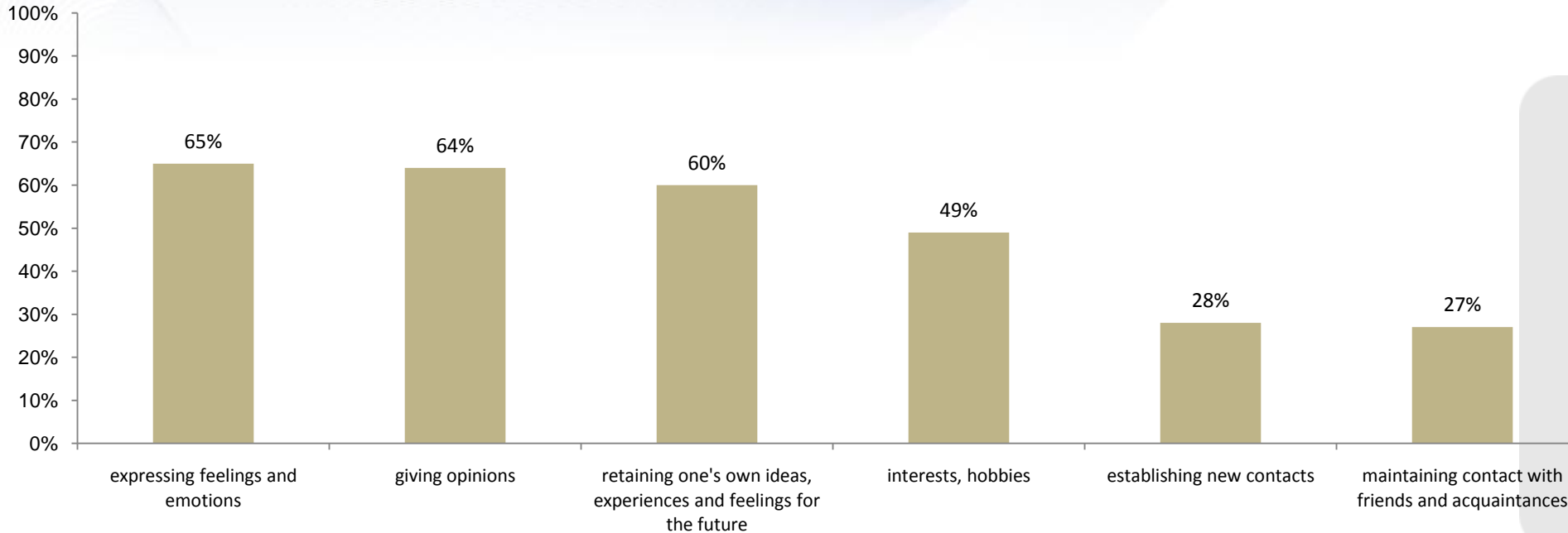
2008		
	monthly page views	average time per user [hrs:min:s]
BlogOnet	77 938 235	00:36:39
Blox	26 035 398	00:12:55
Blogger	17 840 726	00:09:36
Bloog	24 618 940	00:11:53
WordPress	7 578 279	00:07:20

As regards reach, there is no unequivocal leader among the blog sites on the Polish market. Four: BlogOnet, Blox, Blogger and Bloog have a reach of a dozen or so percent. However, according to the number of page views, one can observe the visible predominance of Onet blogs, which generate almost 78 million page views per month.

Source: Megapanel PBI/Gemius, November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Reasons for blog writing

Indicate the reasons for writing a blog:



<20% categories were not taken into account on the diagram.

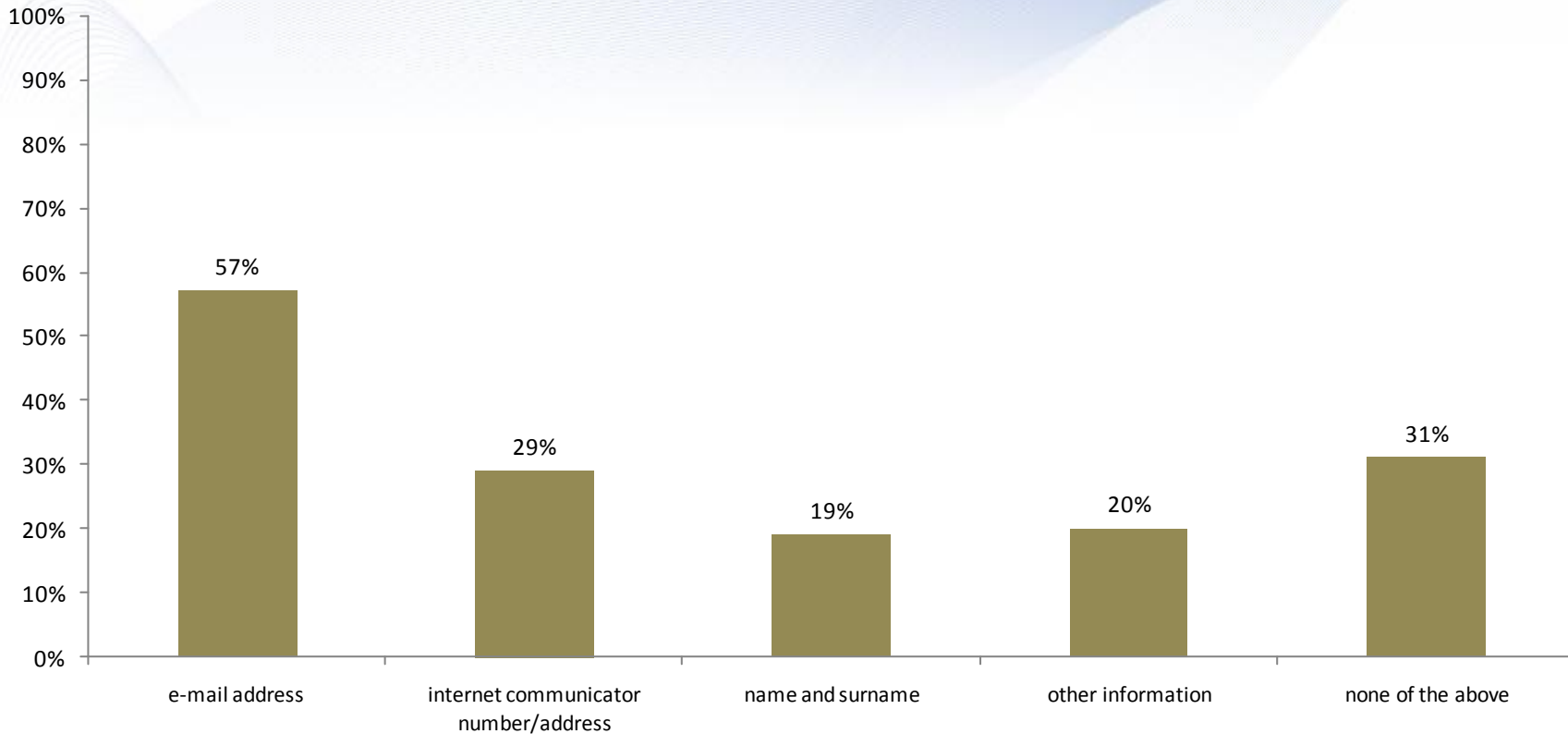
The percentages do not total 100 percent, as the respondents could indicate more than one answer.

On the one hand, bloggers treat blogs as a form of effective expression of their emotions and feelings. However, on the other hand, the blog is treated almost as a kind of an internet forum, allowing one to present one's opinions about subjects that are important for oneself. The blog also performs the function of a modern-day diary, allowing one to retain one's own ideas, experiences and feelings in a permanent way for the future.

Source: Motivations, behaviours and opinions of blogs' authors and readers; Sample size N=1,598 Base: people who have recently written at least one blog; Studied group internet users aged 15+.

Personal information revealed on blog

What kind of personal information do you reveal on the blog?



<15% categories were not taken into account on the diagram.

Percentages do not total 100% as the respondents could indicate more than one answer.

Most bloggers (almost two thirds) reveal only their e-mail address to others. The telephone numbers and addresses of internet communicators as well as the name of the author are more rarely posted on blogs. Thus, on the one hand, bloggers reveal their feelings and opinions, but on the other hand, the majority of bloggers have a barrier which helps them to maintain their anonymity.

Source: Motivations, behaviours and opinions of blogs' authors and readers; Sample size N=1,598 Base: people who have recently written at least one blog; Studied group internet users aged 15+.

Social shopping

One of the newest trends currently observed on the internet in Poland is the appearance of a phenomenon connected with e-commerce, so-called social shopping. This is a combination of online shops together with an active social network developed for the optimization of the purchases made. These web sites are not only a platform for the exchange of information and opinions regarding different products but they are also a place where users can learn about the most profitable offers and discounts. Thanks to web sites of this kind users can not only buy at the lowest prices but also diminish the purchase risk. Even though in November 2008, data in the Megapanel PBI/Gemius study were available for cokupic.pl only, it can be assumed that social shopping has the possibility of achieving great success on the web. The basis for reaching such a conclusion are the outcomes which show the great popularity of social networking web sites as well as the great reach of internet auction sites and shops. At present there are four significant web sites of this kind in Poland and those in question include: cokupic.pl, znam.to, sondi.pl, chce.to.



2008

	monthly reach	monthly page views	monthly time [hrs]
Communities	76.9%	14 273 127 546	156 405 165
Auctions and Shops	62.3%	5 154 829 722	46 991 832

* Megapanel PBI/Gemius authorised aggregates, November 2008

Source: Megapanel PBI/Gemius, November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Citizen journalism

An interesting example of the output of internet users within web 2.0 is the appearance of so-called citizen journalism. The aim of citizen journalism is to provide each citizen with the possibility of publishing one's own articles and participating in the creation of information web sites. Thanks to web sites of this kind, information can be not only quickly delivered but also completely independent. In practice however, these web sites do not transfer the initiative to internet users as they monitor published content through editing, which stands in opposition to the postulated idea of independence. These portals are not particularly popular. These include wiadomosci24.pl, which has the greatest reach of 3.9 percent. Despite this fact, citizen journalism is gaining increasingly more interest among internet users and as a whole category exceeds 10 percent of total reach. One should bear in mind that this is a relatively new group of web sites and it is likely and possible that it will develop dynamically in the future.

2008

	monthly reach	monthly page views	monthly time [hrs]
wiadomosci24.pl	3.9%	2 044 558	29 302
Moje Miasto group	3.3%	2 619 055	44 142
Interia 360	3.0%	2 752 833	72 262
salon24.pl	0.8%	3 479 767	104 175
Alert24	0.8%	579 317	11 645
ithink.pl	0.7%	209 240	2 088
citizen journalism*	10.6%	11 684 770	263 614

* The node includes only the above-mentioned web sites.



Source: Megapanel PBI/Gemius, November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Internet vs. other media

Internet vs. other media

Media usage

Browsing world wide web pages and using e-mail has become a more frequent form of media usage than watching television among internet users. What is more, traditional media are increasingly more often enjoyed via the internet.

Online video

On the Polish market, youtube.com predominates among video web sites, reaching as many as 45.3 percent of users monthly and generating the largest number of page views. Moreover, the monthly time spent on youtube.com is the greatest. Another important web site is wrzuta.pl, having 25.2 percent reach in November 2008. This site is in second position as regards time and the number of page views among the five web pages of greatest reach.

Online TV

There are two leaders among web sites offering online TV services on the Polish market: wp.tv and onet.tv and their reach exceeds 10 percent. In the case of number of page views, itvp.pl visibly predominates among the five most popular web sites as regards reach. At this point in time, the remaining web sites were not very popular.

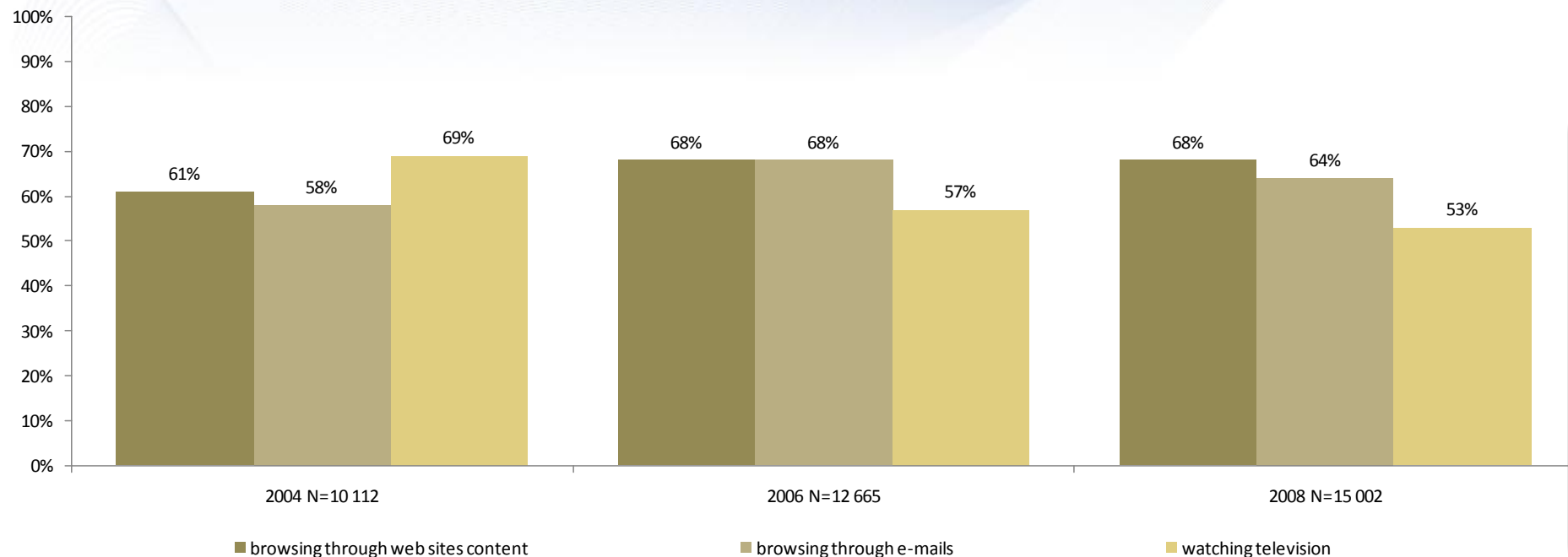
Online radio

The reach of web sites offering online radio services is not great and amounts to only several percent. The most popular web sites are those belonging to the RMF FM and ESKA groups and their reach exceeds 6 percent. The monthly time spent on a web page is highest in the case of the RMF FM group, as users spend an average of over 4 hours monthly there. However the web site with the greatest number of page views is Last.fm.



Media usage – top 3

Which of the listed activities did you perform yesterday?



The diagram illustrates the three most often indicated activities.

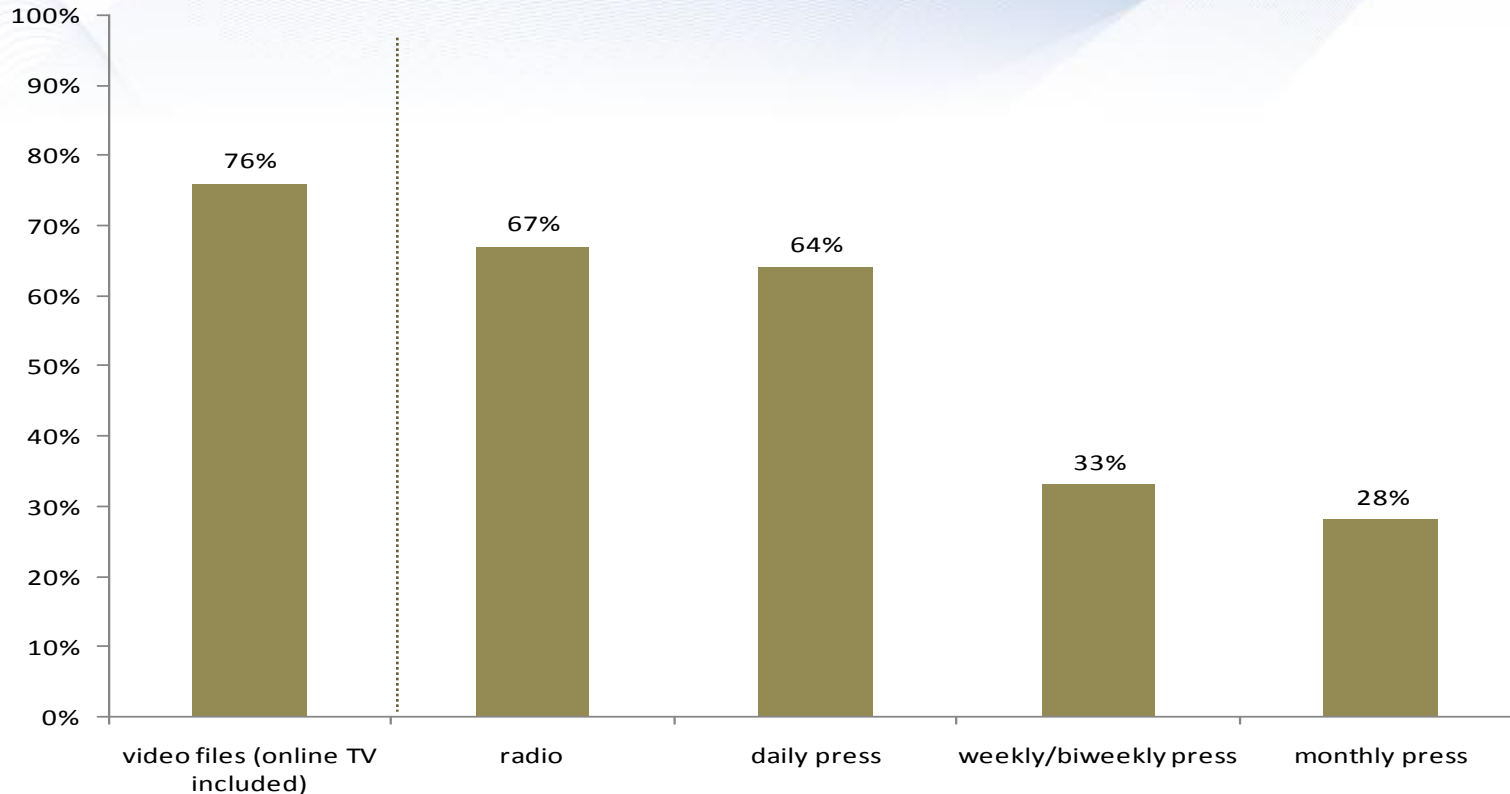
The percentages do not total 100 percent as the respondents could indicate more than one answer.

Since 2004, the percentage of internet users who declare that they watch TV has fallen (from 69 percent in 2004 to 53 percent presently). This may be related to, on the one hand, a growing tendency to use the internet to watch video material and on the other hand, due to the fact that the internet gives users more information than the passive television broadcast.

Source: gemiusReport, *Media consumption 2004 - 2008*; Base: All respondents; Studied group internet users aged 15 – 79 ; In the study, demographic structure data from the Omnibus PBS study were used.

Traditional media usage via the internet

Have you ever watched video files /television /listened to the radio /read daily /weekly /biweekly /monthly press via the internet?

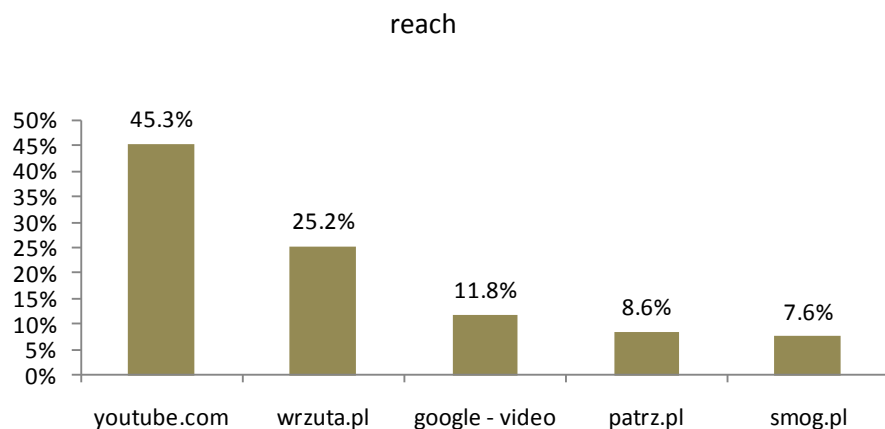


The percentages do not total 100 percent as the respondents could indicate more than one answer.

Three in four internet users watch video or TV via the web. The technical capabilities and the amount of such content on the web have resulted in the fact that online video has become an everyday part of the web for Polish internet users. In the case of radio and daily press, a similar situation is observed, that is two-thirds of internet users switch on their computers to listen to the radio or read the latest news. The end of the printed press has been predicted by some, however, this will probably not happen soon, although ease of access to the latest news means that we now more frequently get everyday news from the web and more rarely from the front pages of the newspaper.

Source: gemiusReport, *Media consumption 2008*; Sample size N= 15,002; Base: All respondents. Studied group internet users aged 15-79; In the study, demographic structure data from the Omnibus PBS study were used.

Online video: five most popular web sites according to reach



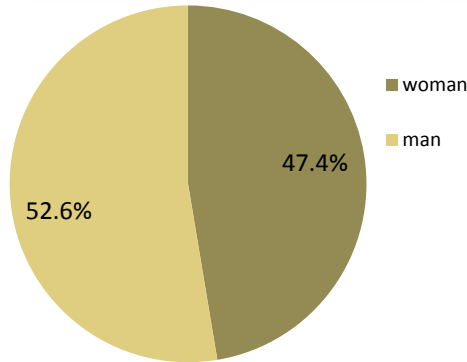
Statistics for the five most popular web sites according to reach:

2008		
	monthly page views	average time per user [hrs:min:s]
youtube.com	955 861 843	03:58:35
wrzuta.pl	240 560 350	01:18:40
google – video	17 025 167	00:11:36
patrz.pl	12 698 073	00:07:22
smog.pl	52 972 292	00:15:09

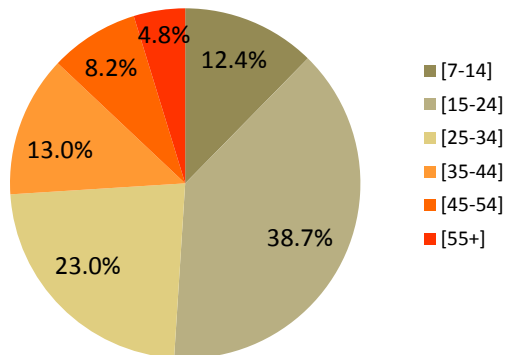
In Poland, YouTube has become a synonym for web sites with video content, reaching as many as 45.3 percent of users monthly and generating the greatest number of page views. However, other web sites have also gained a substantial share: in November 2008, wrzuta.pl had over 25 percent reach. These two web sites are without doubt the leaders among web pages which enable users to watch and share video files.

Source: Megapanel PBI/Gemius, November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Online video: gender and age structure on the basis of the five most popular web sites according to reach



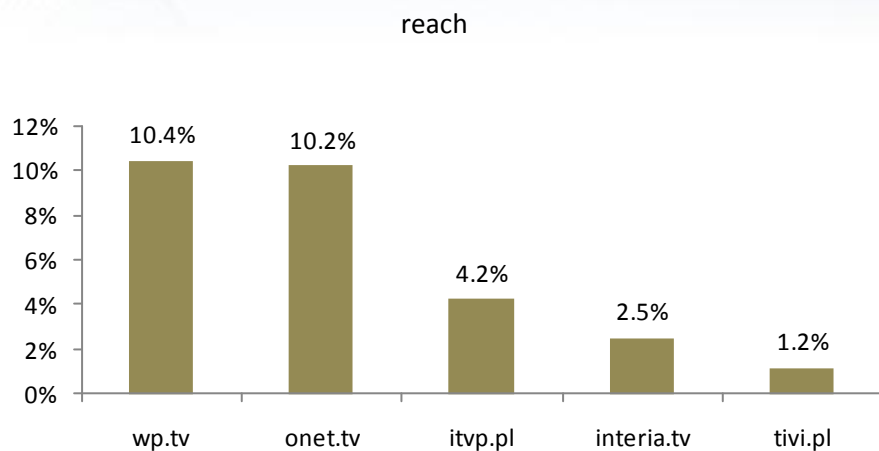
Persons watching online video content are mostly young people, aged 35 or less. The total share of all internet users amounts to 74 percent.



age/gender	woman	man	total
[7-14]	5.0%	7.4%	12.4%
[15-24]	20.9%	17.8%	38.7%
[25-34]	11.6%	11.4%	23.0%
[35-44]	5.2%	7.9%	13.0%
[45-54]	3.3%	4.9%	8.2%
[55+]	1.4%	3.4%	4.8%
total	47.4%	52.6%	100.0%

Source: Megapanel PBI/Gemius, November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Online TV: five most popular web sites according to reach



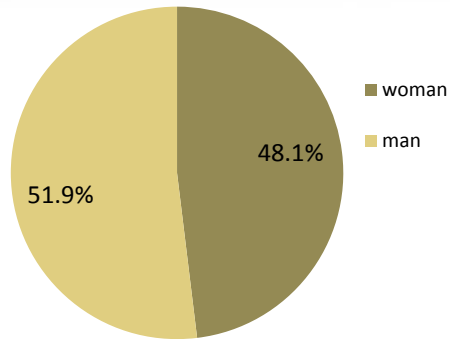
Statistics for the five most popular web sites according to reach:

2008		
	monthly page views	average time per user [hrs:min:s]
wp.tv	6 784 592	00:17:35
onet.tv	6 577 836	00:08:44
itvp.pl	9 314 379	00:21:19
interia.tv	1 088 777	00:09:32
tivi.pl	1 458 971	00:13:15

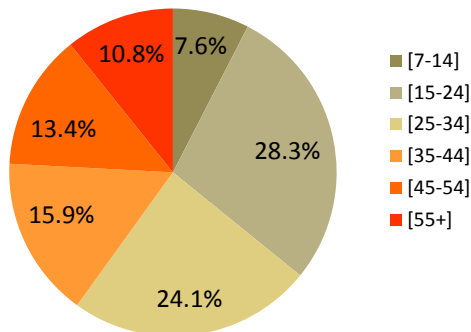
Wp.tv and onet.tv are the leaders among the web sites offering online TV services with their reach exceeding 10 percent. As far as the number of page views is concerned, itvp.pl predominates over the five selected web sites.

Source: Megapanel PBI/Gemius, November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Online TV: gender and age structure based on the five most popular web sites according to reach



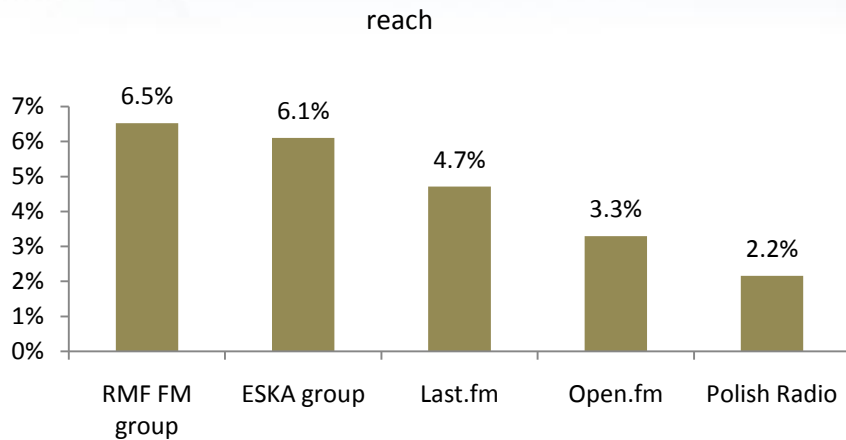
With regards to online TV, men are the largest group among the users of the five most popular web sites. The selected online TV web sites are most popular among young people, aged 15-34; people from this age group constitute over 50 percent of all users.



age/gender	woman	man	total
[7-14]	4.1%	3.5%	7.6%
[15-24]	15.9%	12.4%	28.3%
[25-34]	12.7%	11.5%	24.1%
[35-44]	6.2%	9.7%	15.9%
[45-54]	5.7%	7.8%	13.4%
[55+]	3.6%	7.2%	10.8%
total	48.1%	51.9%	100.0%

Source: Megapanel PBI/Gemius, November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Online radio: the five most popular web sites according to reach



Statistics for the five most popular web sites according to reach:*

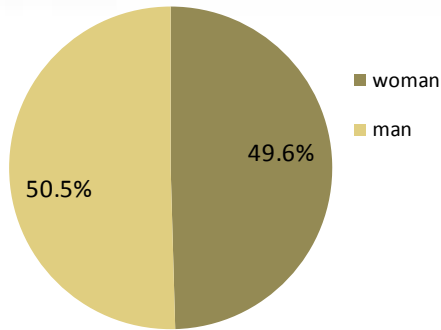
2008		
	monthly page views	average time per user [hrs:min:s]
RMF FM group	18 213 449	04:14:37
ESKA group	16 803 117	00:23:08
Last.fm	27 986 385	01:01:23
Open.fm	2 163 092	00:07:33
Polish Radio	6 326 694	00:21:16

* The groups are composed of the following web sites:
 the RMF FM group: miastomuzyki.pl, RMF FM, RMF Maxxx, RMF Classic, RMF Maxxx TV
 the ESKA group: eska.pl, eskarock.pl, wazzup.pl, eska.tv, hitfm.pl;
 Polish Radio: Polish Radio 1, Polish Radio 2, Polish Radio 3, Polish Radio – other stations.

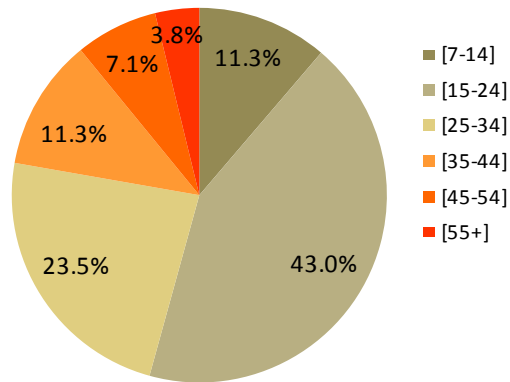
The reach of the web sites offering online radio services is not great and totals only a few percent. The most popular web sites are those belonging to the RMF FM and ESKA groups with their reach exceeding 6 percent. In comparison with the declarative data (67 percent of internet users who have ever listened to the radio via the web) the reach of these particular web sites seems insignificant. This may indicate a large diversification of radio stations and ways of listening to the radio by Polish internet users, since not all of them (for example listening to the radio through Winamp) are taken into account in the study.

Source: Megapanel PBI/Gemius, November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Online radio: gender and age structure on the basis of the five most popular web sites according to reach



The greatest percentage (as many as 43 percent) among those who listen to the selected online radio web sites are people aged 15-24 with women predominating in this group. However, in the whole population of online radio listeners, the age structure is balanced.



age/gender	woman	man	total
[7-14]	3.9%	7.3%	11.2%
[15-24]	23.9%	19.2%	43.0%
[25-34]	12.6%	10.9%	23.5%
[35-44]	4.9%	6.4%	11.3%
[45-54]	3.0%	4.1%	7.1%
[55+]	1.3%	2.5%	3.8%
total	49.6%	50.5%	100.0%

Source: Megapanel PBI/Gemius, November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Internet user finances

Internet user finances

Saving

Savings accounts remain the most popular way of saving and investing one's finances. The majority of owners of savings accounts also choose to use the account's internet service. The reasons why internet users who own an account do not use the attached internet service have changed. During the last few years, anxieties related to the safety of bank transactions have become a significant obstacle in this regard. What is more, the percentage of people who perceive the servicing of the account to be too difficult has increased (this may be due to the increasing share of older persons in the internet user group). This is important advice for banks as they should ensure that their transaction systems are as simple for their users as possible.

Investments

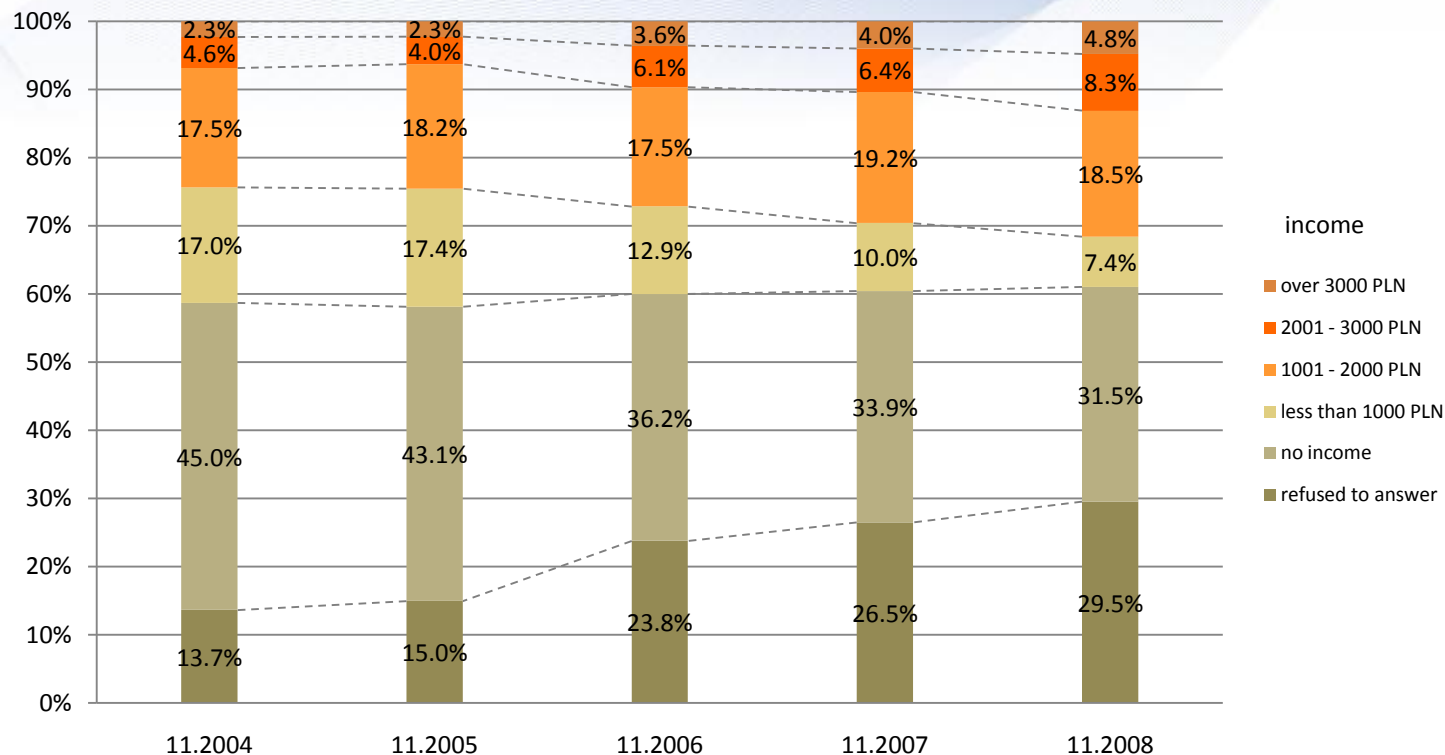
The vast majority of internet users who are decisive as far as investments are concerned, declares that they will not invest their money in the present year. Those few who are planning investments, prefer safer forms of investment (such as making deposits for a fixed length of time).

Social lending

Social loans are a new trend on the Polish financial market. Even though it is a relatively new service, one quarter of Polish internet users have heard about it. At this point in time, the number of people who are aware of what lending networks actually are and how such web sites work is relatively small (2 percent). Persons who are interested in this type of loan are most often residents of smaller cities and rural areas aged 35 or over. They usually have a small income (500 to 1,000 PLN) or earn more than 2,500 PLN.



Polish internet user net income

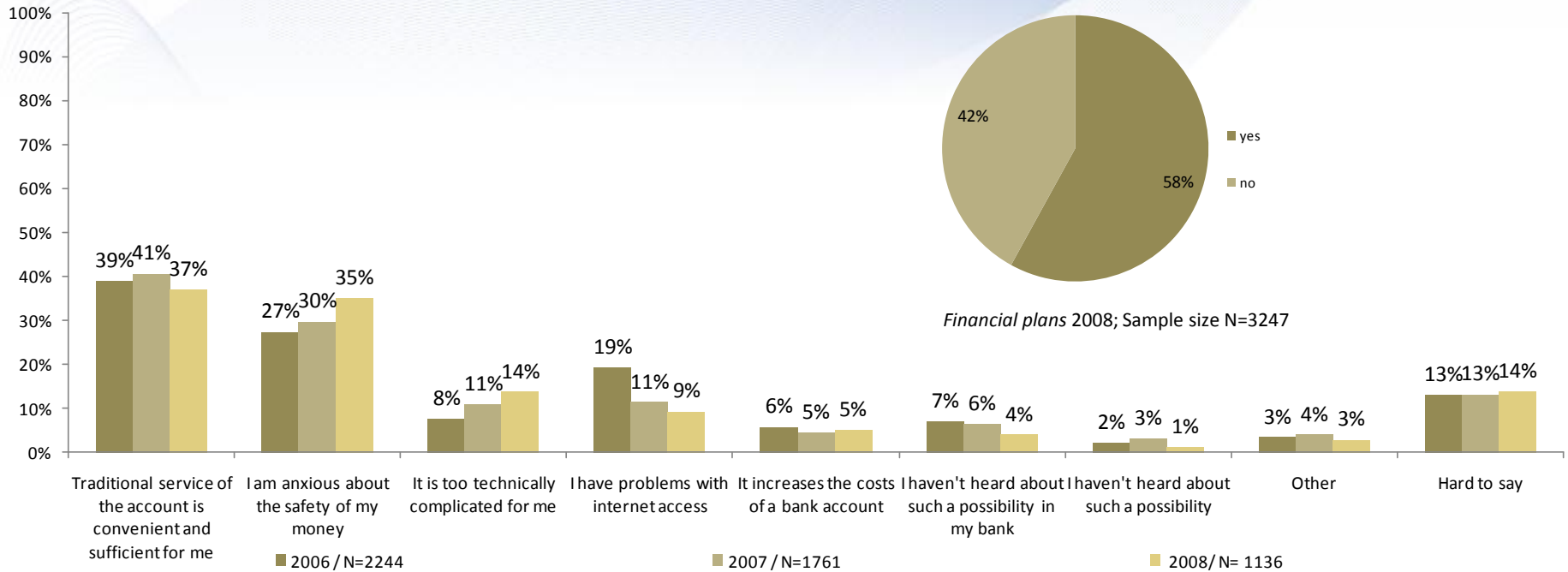


A clear tendency can be seen of Polish internet users becoming increasingly wealthy. Groups that earn more than 2,000 PLN net are growing slowly, but systematically. However, the percentage of people who refused to give their income for the purposes of this study is growing faster. This may indicate greater caution of internet users related to revealing personal information on the web.

Source: Megapanel PBI/Gemius, November 2004; Sample size N = 17,510; November 2005; Sample size N = 26,490; November 2006; Sample size N = 19,614; November 2007; Sample size N = 17,512; November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

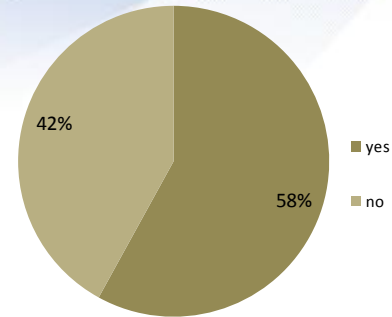
Internet banking

Why haven't you decided to use your bank account's internet service?



Usage of internet bank accounts

Do you use the internet service of your bank account?



Financial plans 2008; Sample size N=3247

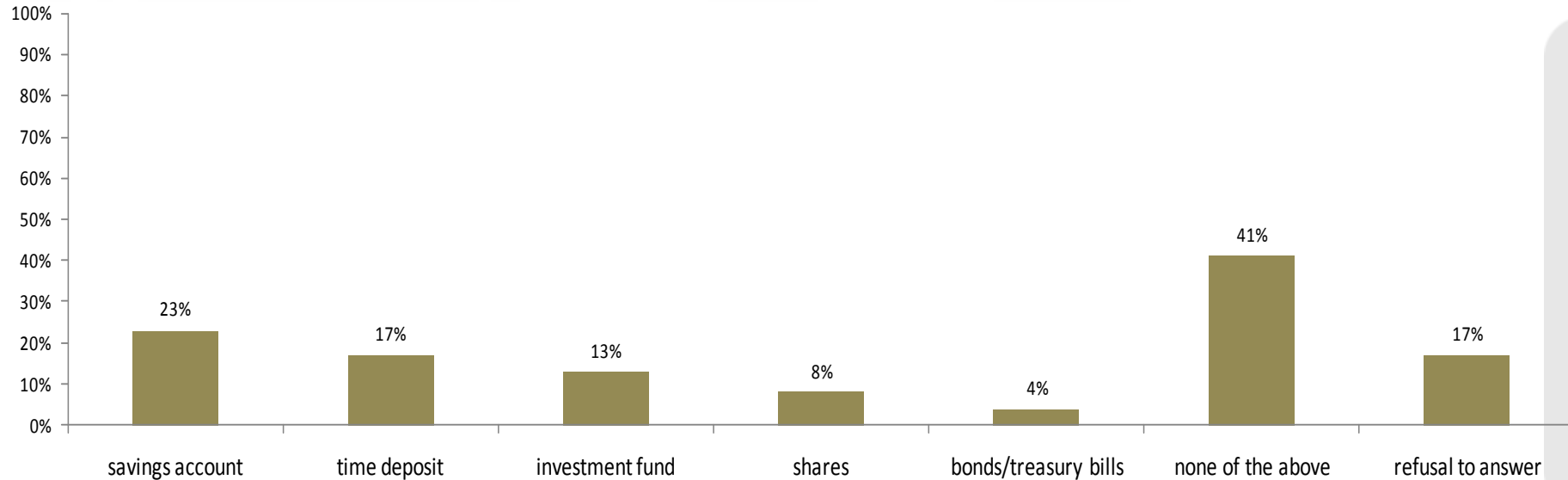
The percentages do not total 100 percent as the respondents could indicate more than one answer.

Over half of all internet users use the internet service of a bank account. During the last few years, the reasons why internet users who own an account and do not use the internet banking service have changed. In the last year, internet users considerably more frequently than in preceding years did not decide to use this form of service for security reasons. The reason for this situation may be an explosion of internet fraud, which has been particularly well publicised during the last year. At the same time, it is worth noting that the percentage of people who have problems with access to the internet is becoming increasingly smaller. However, one can observe an increase in the number of people who claim that internet service of bank accounts is too complicated.

Source: gemiusReport, *Financial plans 2006-2008*; Base: respondents who have a personal account without internet service; Studied group: internet users aged 18+; In the study, demographic structure data from the Omnibus PBS study were used.

Savings products: ownership

Do you own any of the savings products mentioned below? Mark all correct answers.



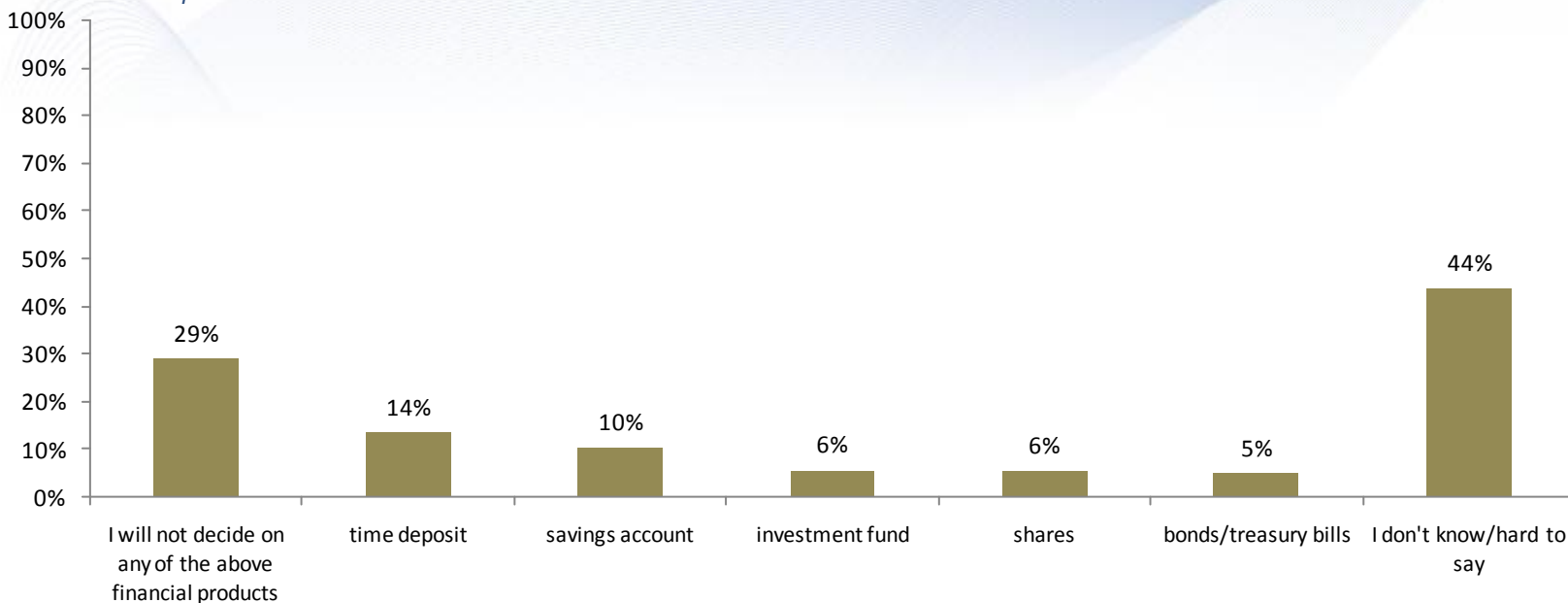
The percentages do not total 100 percent as the respondents could indicate more than one answer.

Two in five Polish internet users did not indicate any of the above-mentioned form of saving. The most popular way of saving money among the ones mentioned above is a savings account. Time deposits and investment funds are less popular.

Source: gemiusReport, *Financial plans* 2008; Sample size N=4,833 Base: all respondents; Studied group: internet users aged 18+; In the study, demographic structure data from the Omnibus PBS study were used.

Investment planning

Do you plan to invest your money in any of the following ways during the next half year?
Mark all planned kinds of investment.



The percentages do not total 100 percent as the respondents could indicate more than one answer.

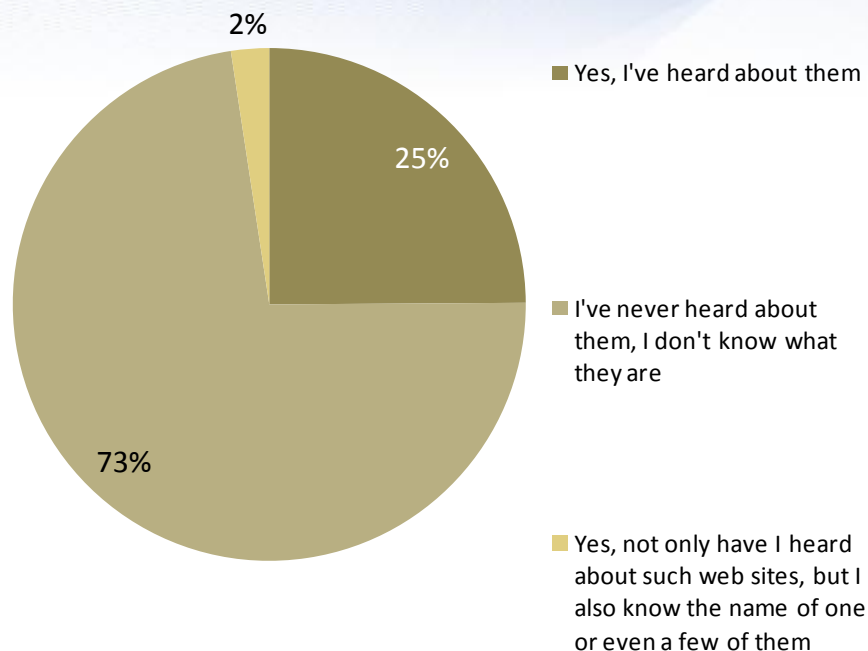
At the end of October 2008, over 40 percent of Polish internet users were not sure whether they will decide to invest their money in 2009. Taking into account those who already had definite investment plans for this year, almost one in every third person declared that he/she will not decide on any of the selected types mentioned here. Those internet users who planned to invest during this year, preferred safe forms of investment, guaranteeing a small but secure profit, such as deposits over a set period of time and savings accounts. Only about one in twenty internet users in Poland indicated investment funds and shares. Taking into consideration that the first (unofficial) accounts related to the financial crisis appeared in Poland during early autumn 2008, it is very likely that internet users verified their investment plans for 2009.

Source: gemiusReport, *Financial plans October 2008*; Sample size N = 4,833. Base: all respondents; Studied group: internet users aged 18 +; In the study, demographic structure data from the Omnibus PBS study were used.

Social lending – knowledge about lending networks

Have you ever heard about internet social web sites where users lend money to one another?

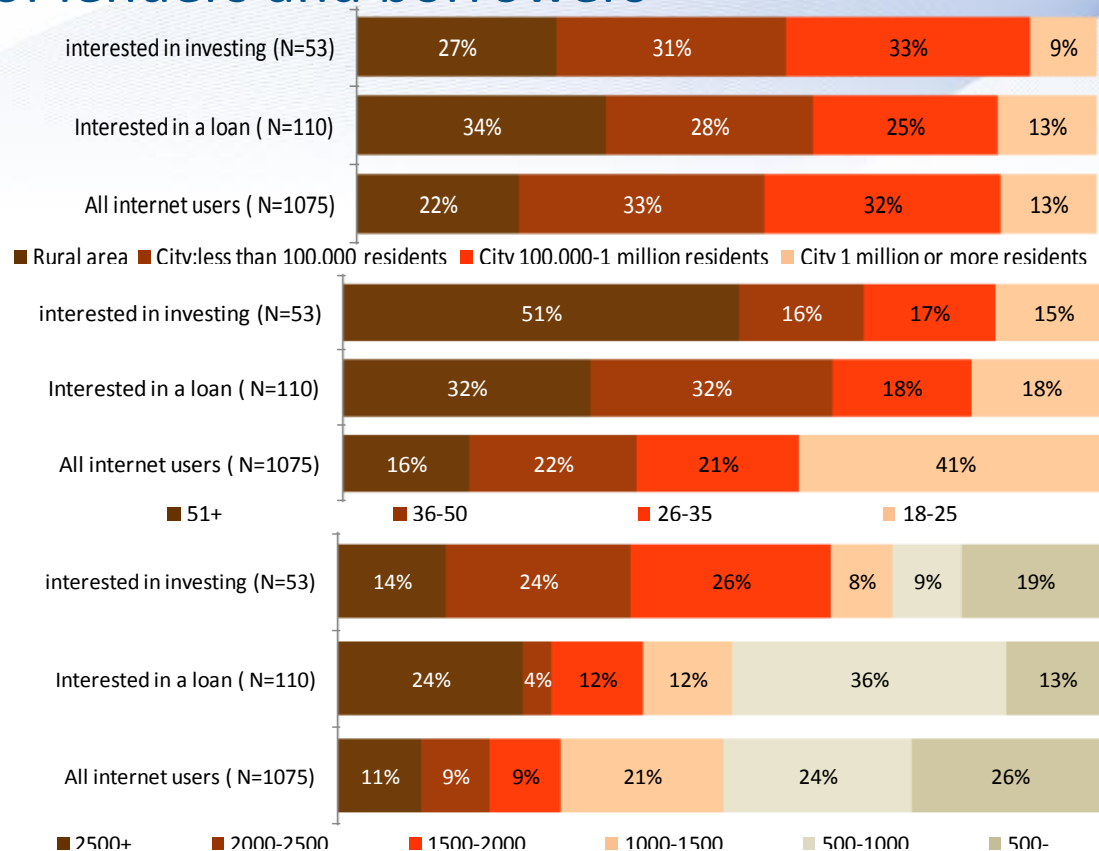
On such networks, internet users make their financial resources accessible (to their friends or larger groups of people) or search for people who can offer them a loan...



One quarter of internet users has heard about social loans, but does not know what they actually are. Only 2 percent of internet users have heard about and know what lending networks are. However, taking into account the short period of existence of these kinds of loans on the Polish market, it is a quite encouraging outcome for people who are responsible for the promotion of web sites of this type.

Source: gemiusReport, *Social Lending 2008*; Sample size N = 1,075; Base: all respondents; Studied group: internet users aged 18+; In the study, demographic structure data from the Omnibus PBS study were used.

Profile of lenders and borrowers



A typical person interested in a loan through social lending web sites is considerably more often a resident of rural areas. Among the persons interested these are usually persons aged 35 or over. More frequently, they are internet users who have an income (per family member) of between 500 and 1,000 PLN. Another numerous group interested in these types of loans are those whose income per family member amounts to more than 2,500 PLN.

Persons more willing to invest (considerably more often than lenders) are young people between 18 and 25 years of age, earning between 1,000 and 1,500 PLN.

Source: gemiusReport, *Social Lending 2008*; Sample size N=1,075; Base: all respondents; Studied group: internet users aged 18+; In the study, demographic structure data from the Omnibus PBS study were used.

E-commerce

E-commerce

Shopping

During the last few years, the increasing trend of shopping via the internet among internet users has been visible. In the previous year, two thirds of Polish web users declared that they shop online. Furthermore, the profile of online purchasers has changed, that is while at the beginning of 2005 the majority of them were men, at present the gender ratio has become balanced. The age limit for internet purchasers has also moved from persons aged 19 or less to consumers aged 20-29. However, the place where these purchases are made has not changed, as invariably more people shop on internet auction sites (76 percent) than in internet stores (60 percent).

Clothes and jewellery are the products most eagerly bought on internet auction sites and as many as 50 percent of respondents buy such products there. Books, CDs and films purchased on internet auction sites are slightly less popular.

The majority (almost two-thirds) of e-store clients buy books, CDs and films there. In comparison with auction sites, only household equipment, tickets for cultural events and tickets for various means of transport are purchased more frequently in internet stores.

On average, internet users shop on the web several times a year, however, interestingly, 37 percent buys something at least once a month. The majority of internet clients does not intend to shop less frequently via the web.

Shopping on the web is perceived by internet users as cheaper and less time consuming than traditional forms of shopping. At the same time, a significant group of respondents (as many as 46 percent) perceives online shopping as risky.

The most popular auction web site is Allegro.pl, with 50 percent reach, while the most popular internet store is merlin.pl. Also, sklepzoponami.pl is worth mentioning as during one year only, it has managed to gain a reach of five percent. Is high specialisation the key to success?

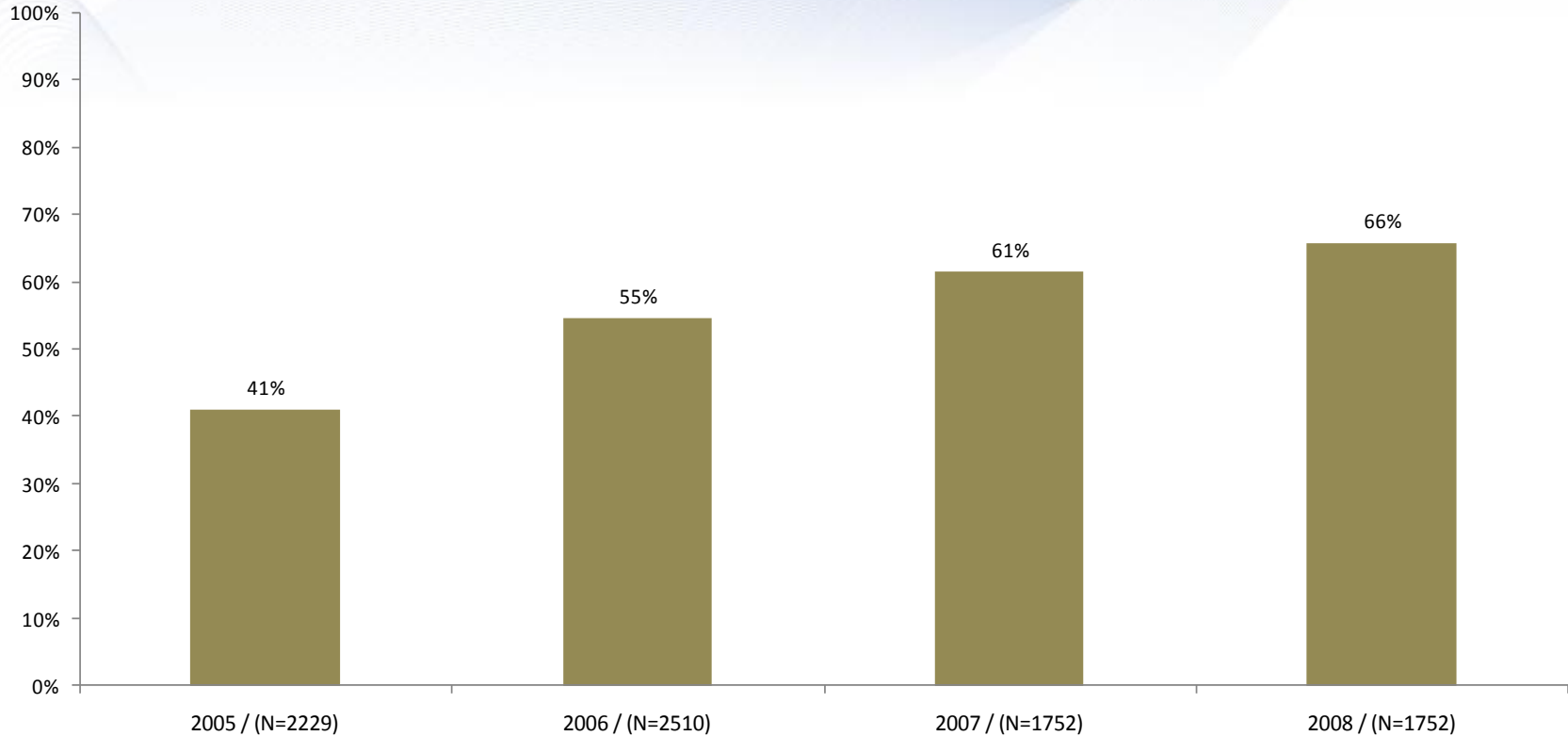
Among the price comparison sites a general increasing trend as far as reach is concerned may be observed. Ceneo.pl has registered a remarkable increase, making it the leader.

Opinions

Evaluating products/services and searching for such evaluations and opinions is a frequent activity on the web and, to a large extent, it influences online commerce (to name but one of its influences). 80 percent of all internet users declare that they have contact with other people's opinions on the web. The majority of them (over two in three persons) met with such opinions on the web sites of e-stores and internet auctions.

Shopping via the internet

Have you ever shopped via the internet?

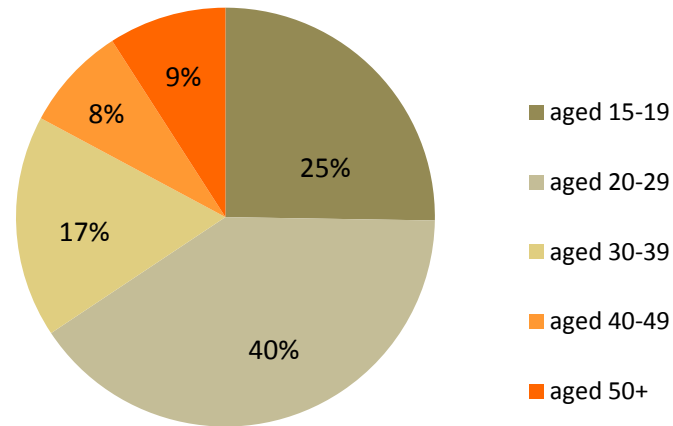
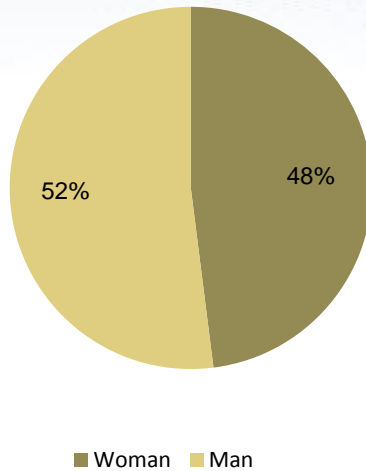


Over the past few years, internet shopping has gained increasingly more popularity; the increasing trend in the number of internet users who declare that they have bought something via the internet has been present since 2005. In that year, little over 40 percent of internet users purchased something on the internet at least once. Today, as many as two in three users declare having bought a product or service on the web.

Source: gemiusReport, *E-commerce 2004-2008*; Base: *all respondents*; Studied group: internet users aged 15+; In the study, demographic structure data from the Omnibus PBS study were used.

Who shops on the internet: gender and age

Have you ever shopped via the internet?



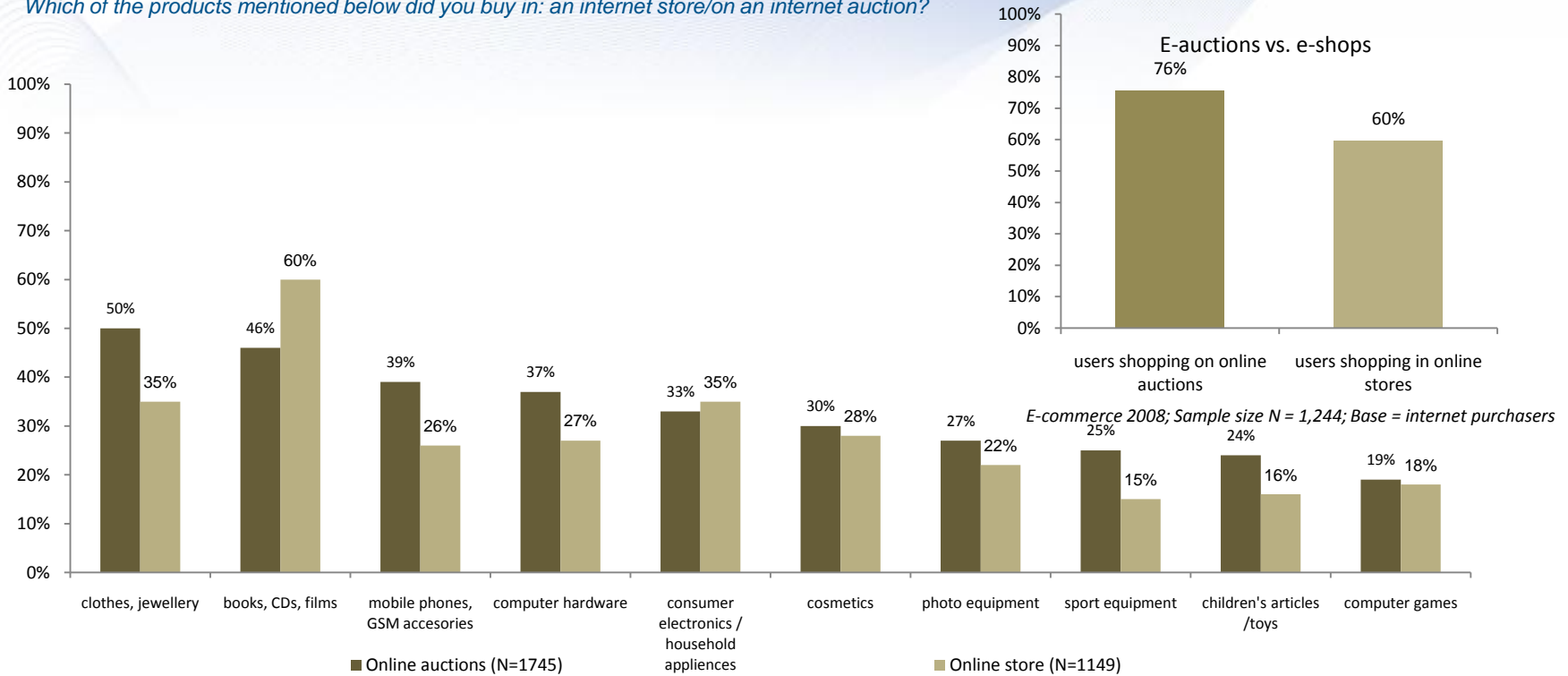
During the last three years, an increase in the number of women purchasing on the web has been observed; at present the situation is balanced. Shopping is mainly the domain of young people with 65 percent of shoppers aged 30 or less.

Source: gemiusReport, *E-commerce 2004-2008*; Base: N = 1,752 all respondents; Studied group: internet users aged 15 +; In the study, demographic structure data from the Omnibus PBS study were used.

Shopping on the internet and the purchased products – top 10

Indicate where you bought something on the internet?

Which of the products mentioned below did you buy in: an internet store/on an internet auction?



The percentages do not total 100 percent as the respondents could indicate more than one answer.

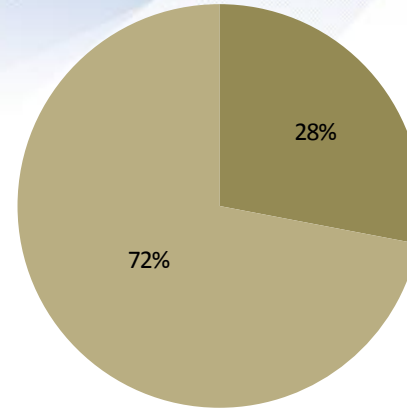
Significantly more Polish internet users who shop via the web choose internet auction sites rather than internet stores. The top 10 products bought by Polish web users on internet auction sites include, most often, clothes and jewellery (as many as 50 percent of respondents buy such products here). Books, CDs and films are slightly less popular. Over one in three persons purchasing via internet auction sites buys products such as GSM accessories, computer hardware and household equipment here. The majority (almost two-thirds) shopping in internet stores buys books, CDs and films. Clothes, jewellery and household equipment are just as eagerly purchased.

Source: gemiusReport, *E-commerce 2008*; Sample size N=1,752; Base: all respondents; Studied group: internet users aged 15+; In the study, demographic structure data from the Omnibus PBS study were used.

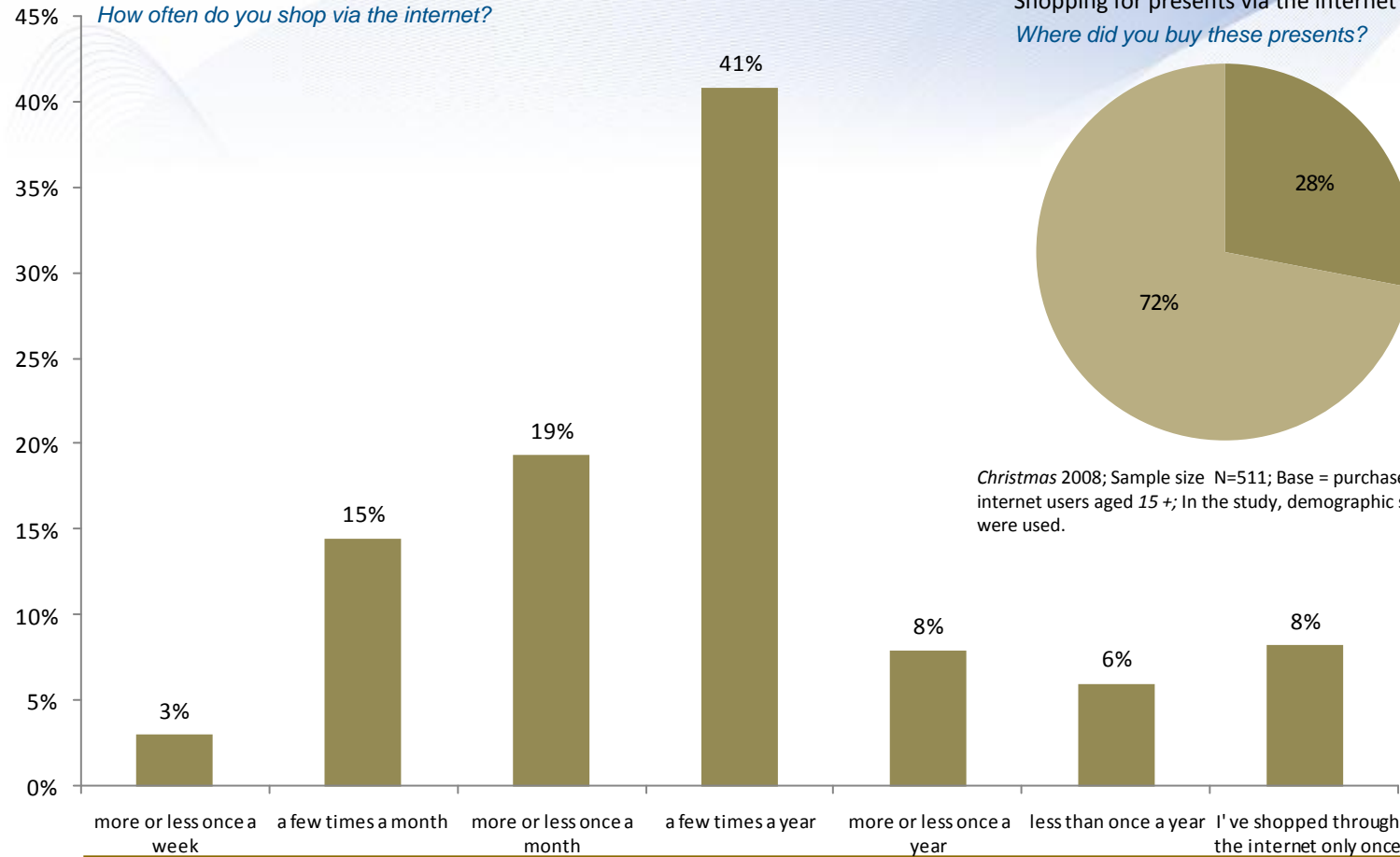
Frequency of shopping on the internet

Shopping for presents via the internet
Where did you buy these presents?

■ via the internet
■ another way



Christmas 2008; Sample size N=511; Base = purchasers of Christmas presents; Studied group internet users aged 15+; In the study, demographic structure data from the Omnibus PBS study were used.

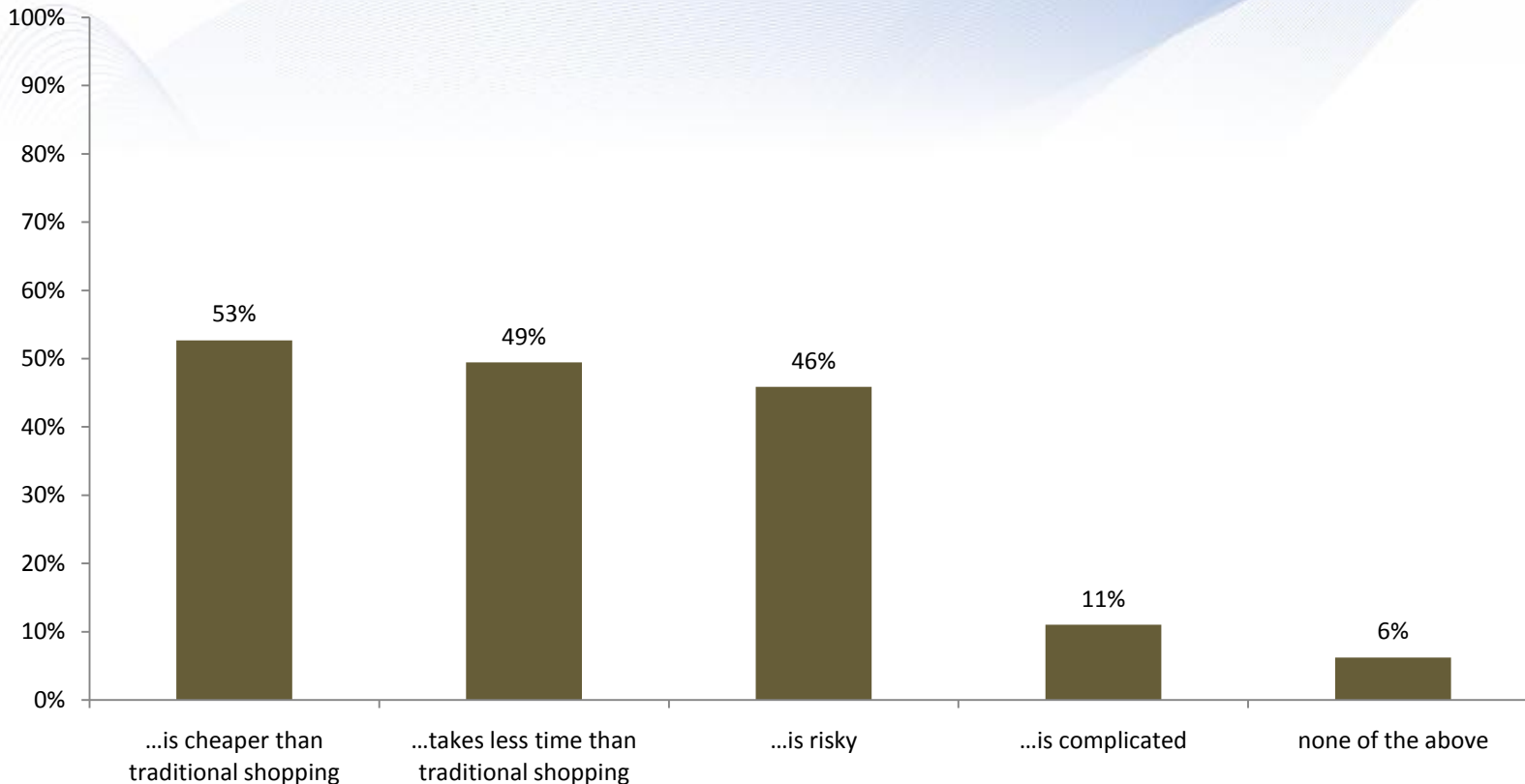


The majority of internet users who shop online declares that they do so several times a year. In all probability, one particular group may include people who Christmas shop on the internet, among whom 28 percent have chosen this form of purchase. 37 percent of internet shoppers purchase something at least once a month.

Source: gemiusReport, E-commerce 2008; Sample size N=1,224; Base: internet purchasers ; Studied group: internet users aged 15+; In the study, demographic structure data from the Omnibus PBS study were used.

Internet shopping: attitudes towards online shopping

Based on your own experiences or other people's opinions, do you think that shopping via the internet...



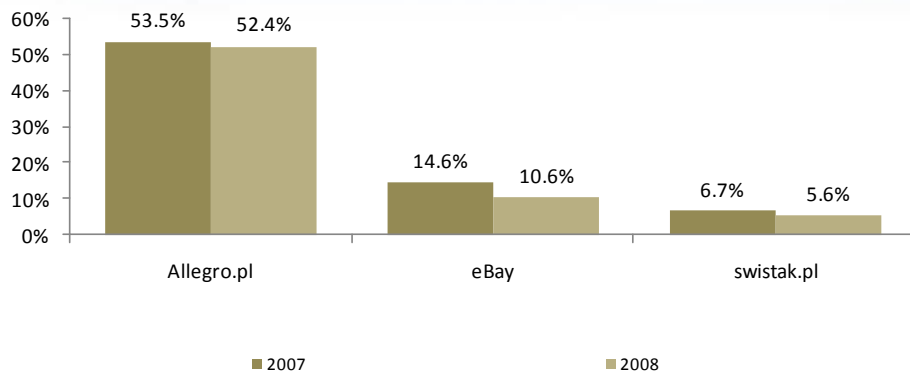
The percentages do not total 100 percent as the respondents could indicate more than one answer.

The main advantages of shopping on the web are lower prices and saving time. What is more, 46 percent of internet users perceive online shopping as risky. Looking at this data shows that shopping on the web is good business for internet users, but still encumbered with a certain amount of risk due to the fact that one cannot touch the purchased goods, and users do not know whether they will receive the products that were ordered.

Source: gemiusReport, *E-commerce 2008*; Sample size N=1,752; Base: all respondents; Studied group: internet users aged 15+; In the study, demographic structure data from the Omnibus PBS study were used.

Auctions: reach, time and number of page views

reach

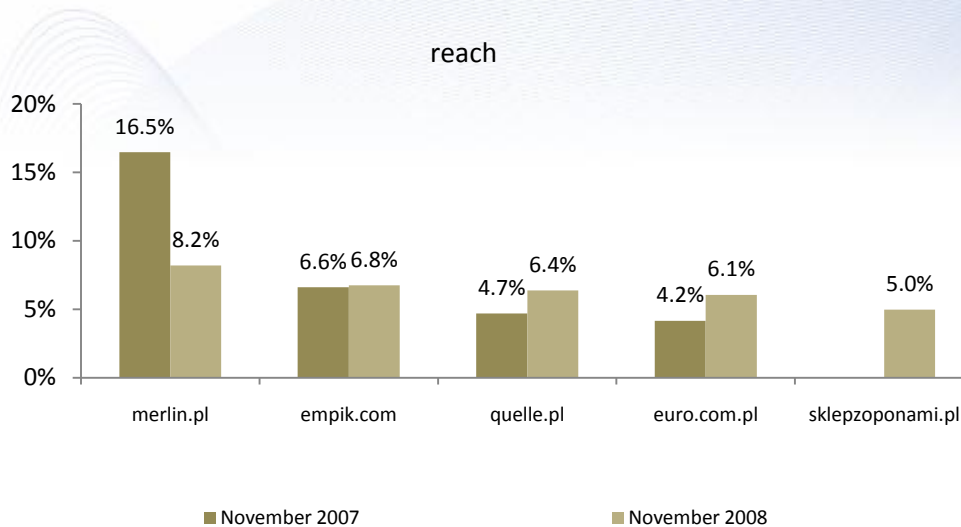


2008		
	monthly page views	monthly time [hrs]
Allegro.pl	4 620 187 850	40 700 030
eBay	56 173 938	687 848
swistak.pl	9 428 608	83 792

For a long time now, Allegro.pl is the undisputed leader among internet auction sites, having 50 percent reach. The analysis of the changes of the reach of other web sites brings about the conclusion that the owners of Allegro.pl can sleep easy safe in the knowledge their site is in a healthy position.

Source: Megapanel PBI/Gemius, November 2007; Sample size N = 17,512; November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Shops: reach, time and number of page views



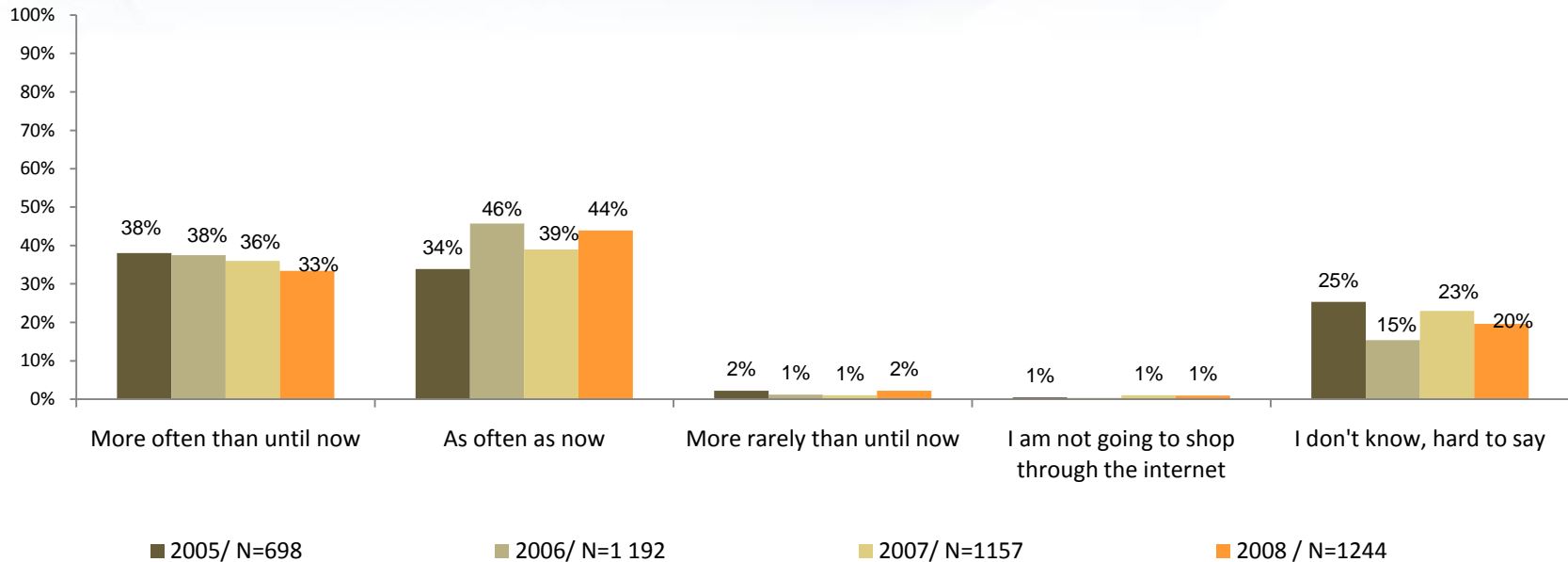
2008		
	monthly page views	monthly time [hrs]
merlin.pl	28 685 892	397 617
empik.com	17 693 864	243 575
quelle.pl	26 805 895	253 073
euro.com.pl	20 815 763	220 917
sklepzoponami.pl	6 772 287	38 339

Despite the large fall in reach, in 2008 merlin.pl retained the position of leader which it occupied in November 2007. However, the visible difference between it and the competition has diminished. Noticeable increases in reach were noted in the case of two shops: quelle.pl and euro.com.pl. What is more, it is worth noting sklepzoponami.pl, which had a reach of five percent in 2008. However, one should bear in mind that the data presented here are for November and due to pre-Christmas shopping the outcomes may be amplified.

Source: Megapanel PBI/Gemius, November 2007; Sample size N = 17,512; November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Intention for future purchases via the internet

In the future, how often do you intend to shop via the internet?

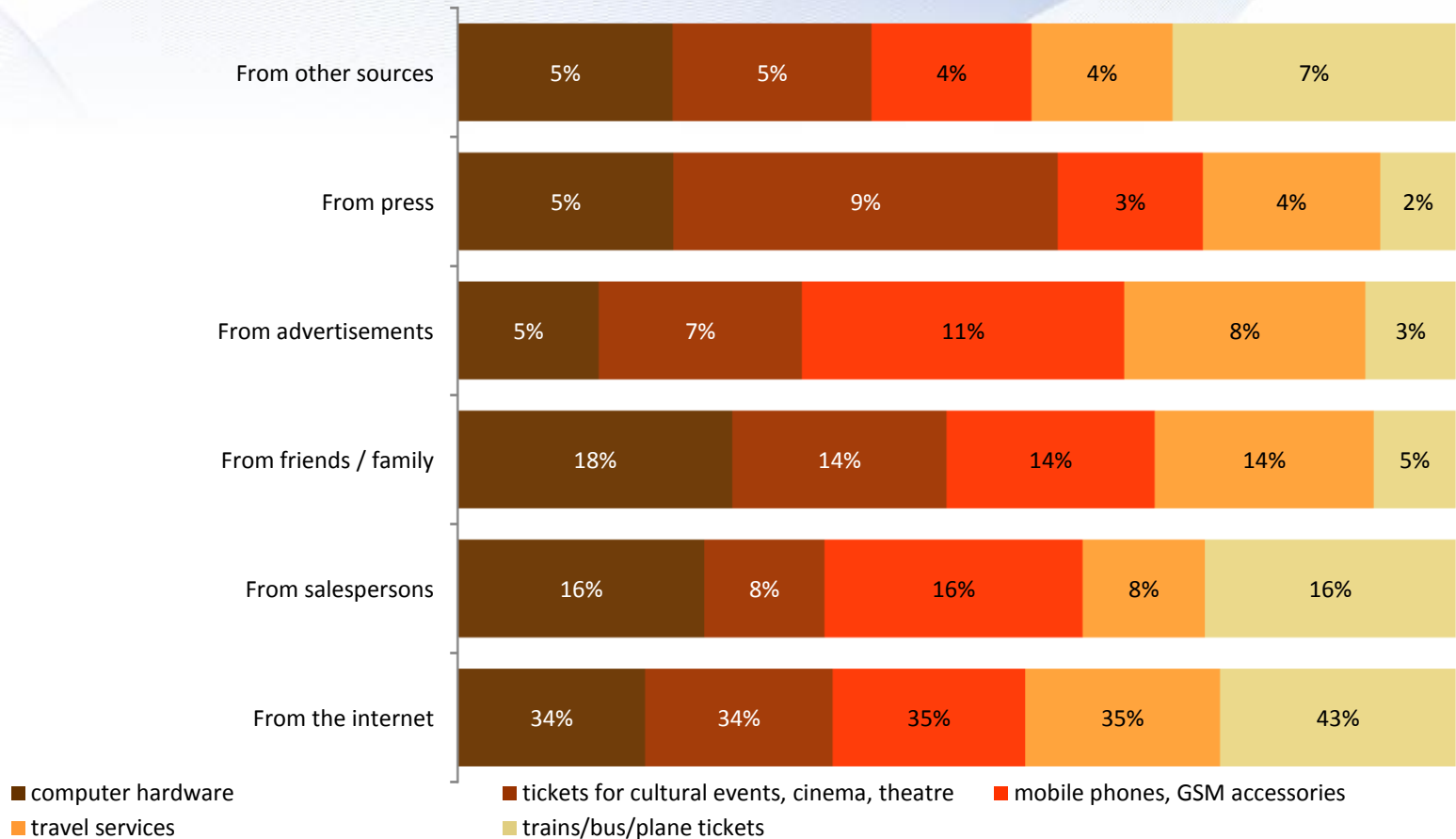


Significantly more people declare their intent to purchase products on the web with the same frequency as in 2008. In comparison with the previous year, the percentage of people choosing this answer has increased. This may be, to some extent, a predictor of positive consumer attitudes in 2009, provided that these plans will not be thwarted by the recession.

Source: gemiusReport, *E-commerce 2004-2008*; Base: all respondents; Studied group: internet users 15+; In the study, demographic structure data from the Omnibus PBS study were used.

Sources of information about products – top 5

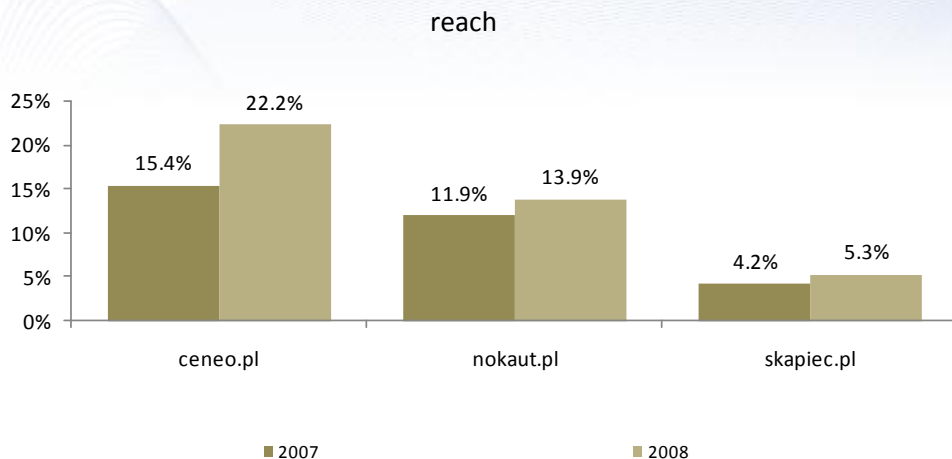
If you decide to shop, from where do you derive the information about a given product?



The internet is the main information channel when searching for tickets, travel services, telephones and computer hardware. The comparison of prices and offers is simply much easier on several web sites than in ticket offices or mobile phone shops.

Source: gemiusReport, *E-commerce 2008*; Sample size N=1,752; Base: all respondents; Studied group: internet users aged 15+; In the study, demographic structure data from the Omnibus PBS study were used.

Price comparison sites: reach, time and number of page views



2008		
	monthly page views	monthly time [hrs]
ceneo.pl	77 954 464	1 193 130
nokaut.pl	10 685 772	893 443
skapiiec.pl	15 023 290	220 948

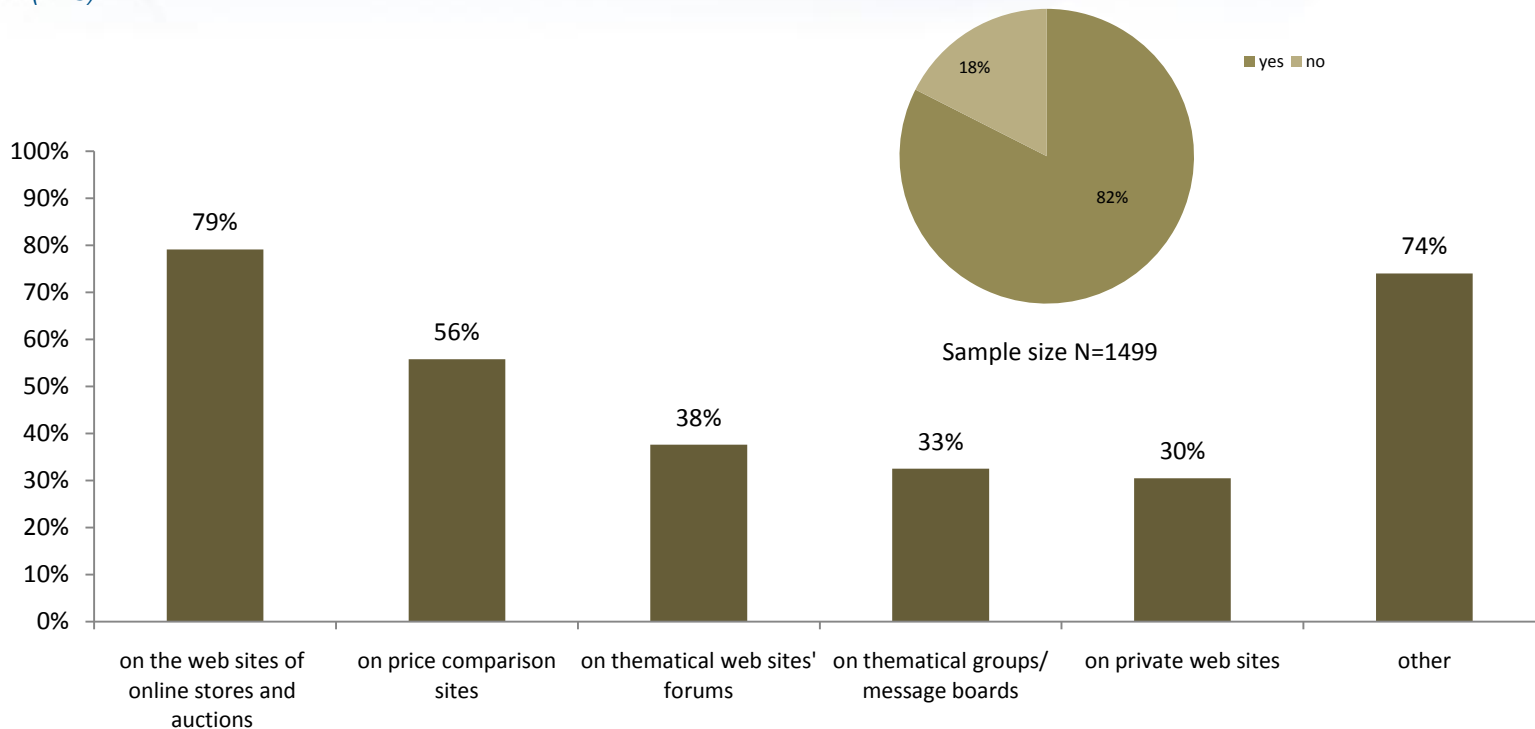
Among price comparison sites a general trend of an increase in reach may be observed. During this year, ceneo.pl has registered a remarkable increase. Internet users appreciate the possibility of finding a shop which offers the lowest price and this is no surprise as it allows users to save a significant amount of money.

Source: Megapanel PBI/Gemius, November 2007; Sample size N = 17,512; November 2008; Sample size N = 16,679. Studied group 7+; Data concerning demographic structure from Net Track Millward Brown SMG/KRC's study, conducted on a sample selected and weighted by PBC, were used in this study.

Contact and points of contact with opinions of other consumers

Have you ever encountered the opinions of other internet users about brands, products or services which they had bought or heard about?

Where on the internet did you encounter the opinions of other internet users about brands, products or services which they had bought or heard about? (YES)



Sample size N=1290

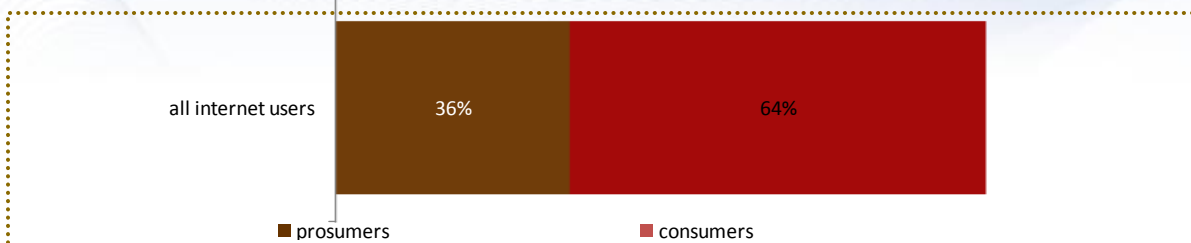
The percentages do not total 100 percent as the respondents could indicate more than one answer.

As many as 82 percent of internet users have encountered other people's opinions about products or services on the web. Most of these opinions were found in the same place as the products, that is on the web sites of shops, auction sites or on price comparison sites. Half of the respondents got to know other consumers' opinions through specialist forums.

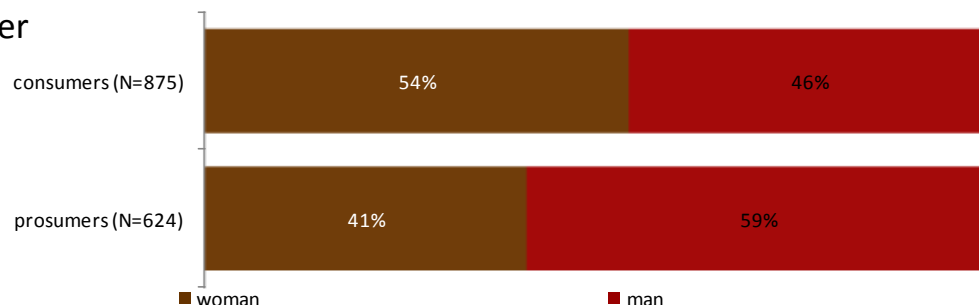
Source: gemiusReport, Internet users – consumers or prosumers? 2008; Base: respondents who encountered opinions of other users; Studied group internet users aged 15+; In the study, demographic structure data from the Omnibus PBS study were used.

Prosumer internet profile

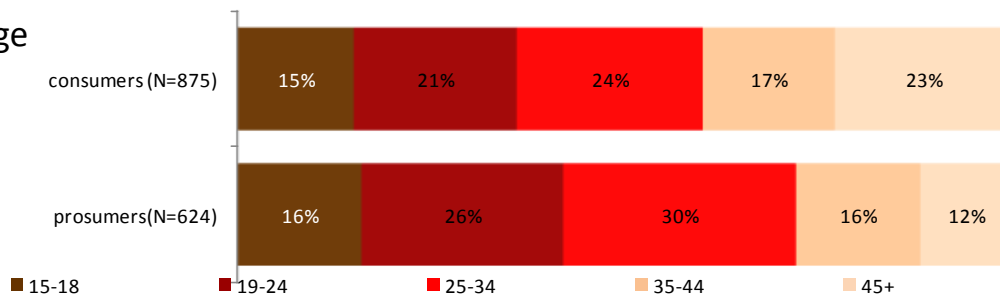
Prosumers on the Polish internet



Gender



Age



A prosumer is an active consumer. For the sake of the research it has been assumed that he/she is an internet user who fulfils at least two out of three criteria:

- he/she encounters other internet user opinions and most frequently when planning the purchases of a product, searches for them;
- describes products and brands on the web or asks questions related to them;
- takes part in special offers, co-creating the products, advertising slogan or campaigns.

Prosumers are significantly more often (in almost 59 percent of cases) men than women.

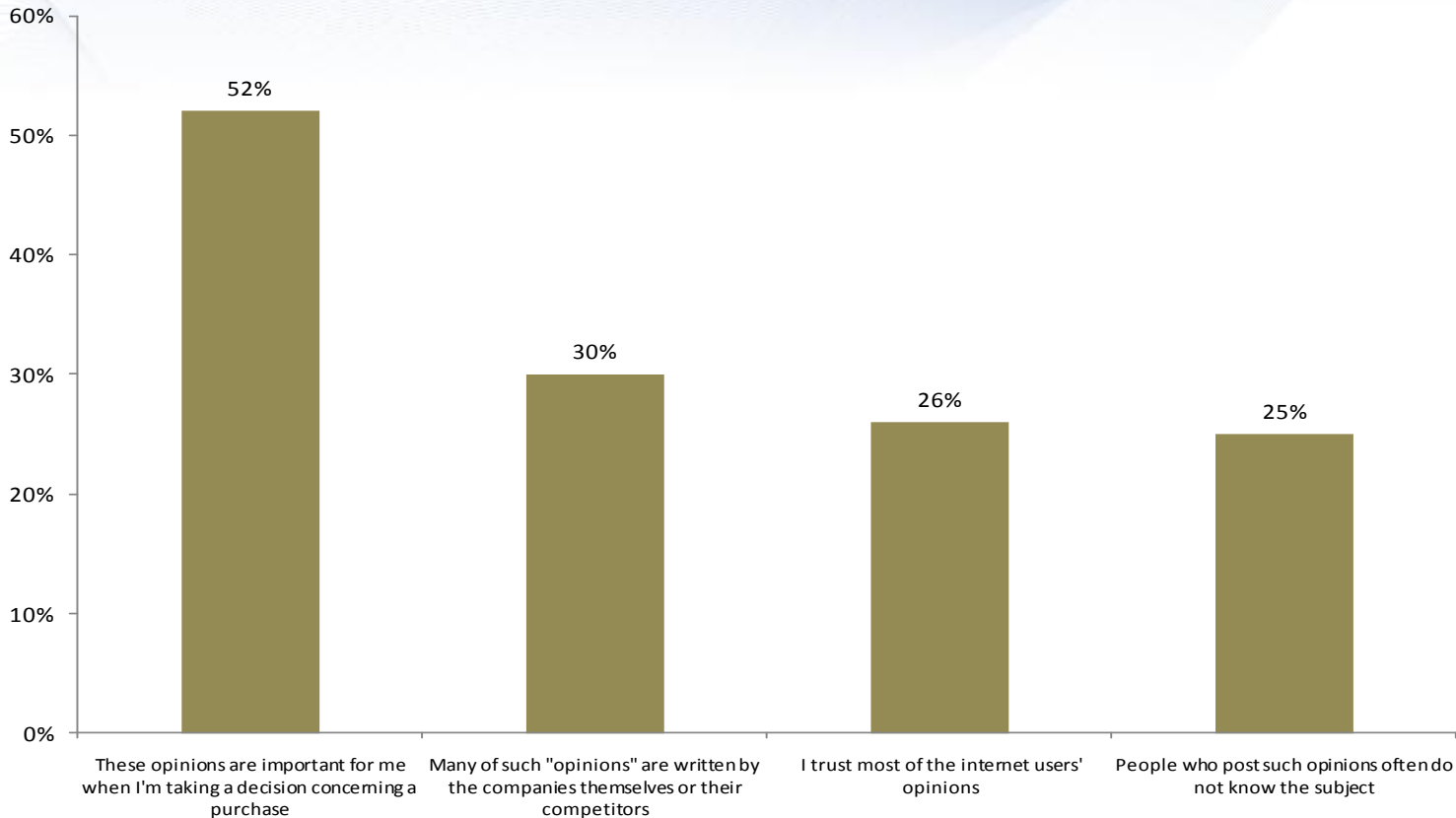
Moreover, the largest group among them are young people, aged 19-34.

People from these age groups are visibly more often engaged in issues related to shopping and consumption.

Source: *gemiusReport, Internet users – consumers or prosumers? 2008*; Sample size N=1,499 Base: all respondents; Studied group: internet users aged 15+; In the study, demographic structure data from the Omnibus PBS study were used.

Attitude towards other consumer opinions

What do you think about these opinions?
Mark the statements you agree with.



The percentages do not total 100 percent as the respondents could indicate more than one answer.

Despite internet user awareness of the low credibility of the opinions posted on the web by companies and persons who are not experts of given subjects, as many as 52 percent of people who encountered such opinions take them into account while making purchasing decisions.

Source: *gemiusReport, Internet users – consumers or prosumers? 2008*; Sample size N=1,290; Base: respondents who encountered opinions of other users; Studied group: internet users aged 15+; In the study, demographic structure data from the Omnibus PBS study were used.

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