

**It's summer -
let's go south!**

**Adria internet market
overview by Gemius**

July 2011





- The aim of the present report is to provide an insight into the landscape of internet in such Adria region countries as Croatia, Slovenia, Bosnia and Herzegovina, as well as Serbia.
- Data shown in this report include general information on total population, online population and internet penetration on these markets as well as socio-demographical data of Adria internet users, information on the key players on those markets and the most recent technological trends.
- The biggest novelty which we would like the readers pay attention to is the introduction of Gemius flagship study, gemiusAudience, on the Serbian market. More on this subject can be found in the press release: www.gemius.com/pl/news/2011-07-13/01. The results of the Serbian gemiusAudience study should be available in the Q1 2012.



- Data delivered by Gemius and Valicon serve as the basis for informing on the general situation on the market
- Data on the socio-demographical profile of an average internet user in Croatia, Slovenia and Bosnia and Herzegovina as well as information on the key market players are taken from the gemiusAudience study
- Information on the most recent technological trends are taken from Gemius web analytics tool, gemiusTraffic. The data will be soon available via gemiusRanking service: <http://rankingcee.com/>



Croatia - since January 2007



Slovenia - since June 2007



BiH - since January 2008



Serbia - since July 2011

Partners





BiH

Total Population (users' age:15-65): **over 4M inhabitants**
Online Population (users' age:15-65): **1 303 794**
Internet Penetration rate (users' age:15-65): **44%**



Croatia

Total Population (users' age:12+): **over 4M inhabitants**
Online Population (users' age:12+): **1 995 756**
Internet Penetration rate (users' age:12+): **51%**



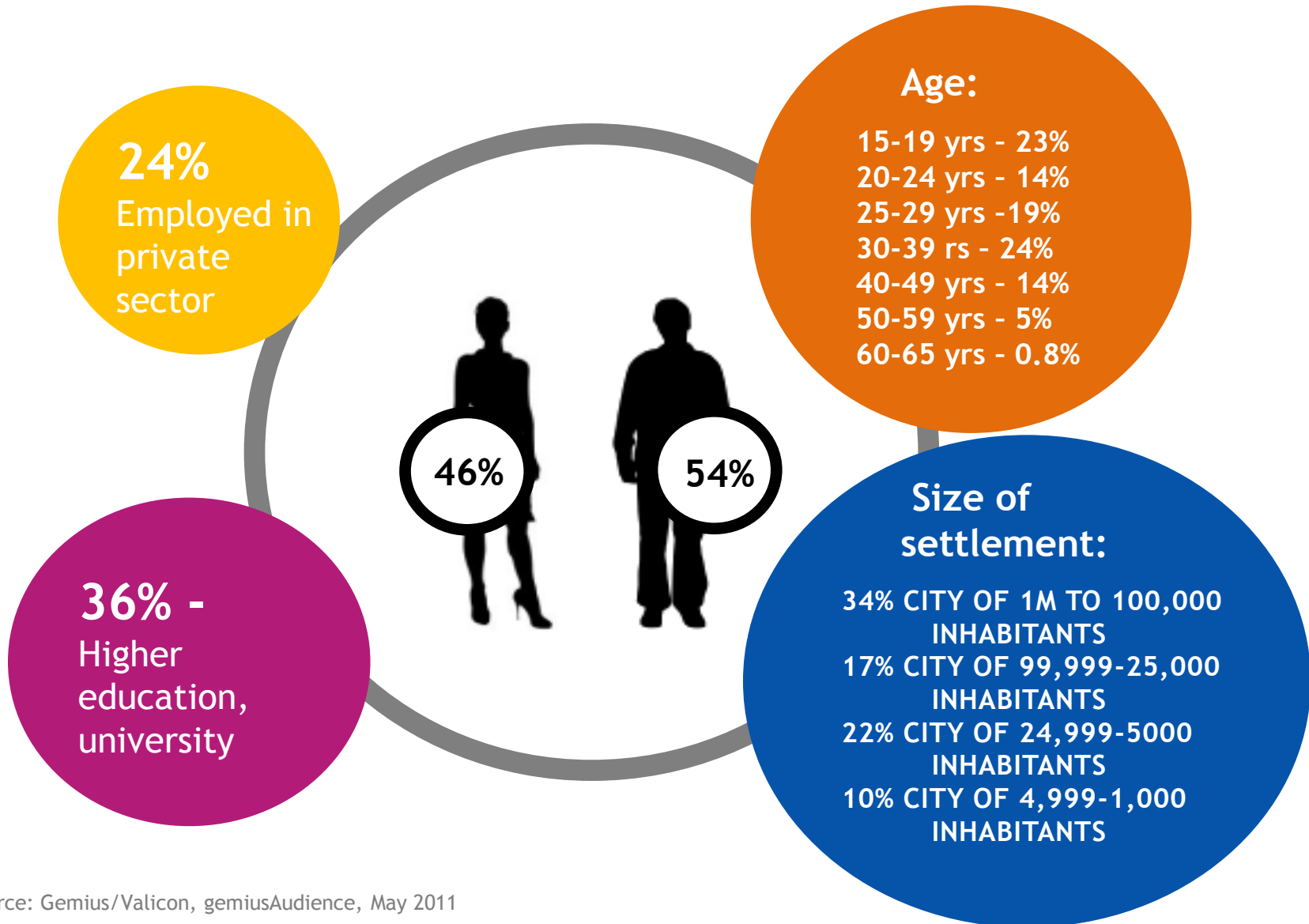
Serbia

Total Population: **7 306 677**
Online Population: **4 107 000**
Internet Penetration rate: **56 %**



Slovenia

Total Population (users' age:10-75): **over 2M inhabitants**
Online Population (users' age:10-75): **1 167 558**
Internet Penetration rate (users' age:10-75): **68%**





25%
Students

Age:

12-14 yrs - 1%
15-24 yrs - 34%
25-34 yrs - 26%
35-44 yrs - 21%
45-54 yrs - 13%
55+ yrs - 5%

49%

51%

26% -
Higher
education,
university

Size of settlement:

27% - CITY OF 1M TO 100,000
INHABITANTS
15% - CITY OF 99,999-25,000
INHABITANTS
18% - CITY OF 24,999-5000
INHABITANTS
19% - CITY OF 4,999-1,000
INHABITANTS



37%

Employed in a company

Age:

10-14 yrs - 8%
15-24 yrs - 19%
25-34 yrs - 21%
35-44 yrs - 20%
45-54 yrs - 17%
55+ yrs - 14%

46%

54%

21% -

Higher education, university

Size of settlement:

17% LJUBLJANA
7% MARIBOR
15% CITY OF 10,000 TO 100,000 INHABITANTS
21% CITY OF 2,000 - 10,000 INHABITANTS
18% CITY OF 500 TO LESS THAN 2000 INHABITANTS



Bosnia and Herzegovina

The data for May 2011 indicate that the Bosnian internet users population is predominantly male, with 8 percent advantage of men over women users.

Over one-third of all Bosnian internet users live in big cities, of 100,000 to 1 million inhabitants.

Out of all analysed Adria countries, it is Bosnia that can pride itself in the largest share of internet users with higher education - as much as 36%. Still, this may also be a sign of the immaturity of the market and limited access to web usage - as it is that largely only this group of people may have access to the online reality.

At the same time, the age structure further proves that Bosnian market is still on the relatively early stage of development. In the age groups from the 15-40 age range the share of users seems proportionally distributed and amounts to 14-24%. This is accompanied by a really small share of web users within two last age groups (50-59 and 60-65 years) which attain an outcome of as little as 5 and 0.7 percent respectively.



Croatia and Slovenia

Upon comparing the gemiusAudience data for Croatia and Slovenia from March 2010 with those from March 2011 certain interesting trends may be observed. As regards Croatian online population, the gender structure remains stable with a slight advantage of men over women (merely 2%). In Slovenia, where in 2010 we could have observed a visible predominance of men (56%), the shares of two genders are stabilizing with a 2 percentage points increase in the share of women.

In Croatia, a statistically insignificant increase in the oldest age group may be noticed. This situation is completely different than that in Slovenia, where the comparison of March 2010 with March 2011 shows a decrease in all age groups (by 3-4 percentage points), apart from the 2 oldest ones (45-54 and 55+ years) which have observed a growth of 2 and 3 percentage points respectively. This is a proof of the maturity of Slovenian online market, where more and more middle-aged and older people begin to actively use the web.



Croatia and Slovenia

As far as education level is concerned, an increase of 6 percentage points may be observed in the share of internet users with higher education in Croatia with a simultaneous increase of 3 percentage points in the share of users - students.

On the Slovenian market the share of the most popular occupational status - company employee - has decreased by 3 percentage points since last year.

Top 10 websites by reach in Bosnia



	WEBSITE	WEBSITE'S CATEGORY	NUMBER OF REAL USERS	NUMBER OF PAGE VIEWS	PAGE VIEWS PER USER	AVERAGE TIME PER USER (hr:mm:sec)	REACH
1	sarajevo-x.com	horizontal portal	343 570	27 625 162	80.41	03:01:48	51.18%
2	pik.ba	classified ads/auction site	335 516	74 625 130	222.42	02:45:25	49.98%
3	blogger.ba	blog site	256 493	2 990 705	11.66	00:11:16	38.21%
4	infobar.ba	news portal	148 543	1 472 301	9.91	00:06:54	22.13%
5	dernek.ba	horizontal portal	129 391	4 622 233	35.72	00:27:34	19.28%
6	sportsport.ba	sport portal	118 121	10 327 597	87.43	02:26:18	17.60%
7	posao.ba	job portal	97 605	3 327 805	34.09	00:20:41	14.54%
8	market.ba	classified ads site	97 523	3 752 060	38.47	00:32:17	14.53%
9	cafe.ba	horizontal portal	93 085	478 569	5.14	00:06:45	13.87%
10	24sata.info	news portal	92 097	2 349 228	25.51	00:39:43	13.72%



Trends in 2011

In 2011 the leader position has been achieved by sarajevo-x.com. This website has started cooperating with blogger.ba which resulted in a substantial increase of its reach which has almost doubled (from 26% to 51%) in comparison to March 2010.

The second place is taken by pik.ba, a classified ads/auction site which didn't appear in the rankings for the last two years. Among top 10 players there is also market.ba, another site from this category, which was ranked 5th in 2009 and 4th a year later.

In March 2011 among the most popular sites there were only two news portals: infozar.ba (not listed in the previous years' rankings) and 24sata.info, one of the leading sites for the third year in a row.

Interesting characteristic of the top 10 Bosnian sites ranking is the presence of posao.ba, a job portal, which is the partner of the EMEA affiliation network (www.emejobs.com), gathering 14 sites from this region.

Top 10 websites by reach in Croatia



	WEBSITE	WEBSITE'S CATEGORY	NUMBER OF REAL USERS	NUMBER OF PAGE VIEWS	PAGE VIEWS PER USER	AVERAGE TIME PER USER (hr:mm:sec)	REACH
1	net.hr	horizontal portal	950 505	205 220 714	215.91	05:20:22	48.74%
2	index.hr	horizontal portal	864 008	82 742 756	95.77	03:26:14	44.31%
3	tportal.hr	horizontal portal	821 889	77 098 760	93.81	01:58:58	42.15%
4	forum.hr	forum site	766 217	48 366 015	63.12	01:11:25	39.29%
5	24sata.hr	news portal	760 430	73 807 943	97.06	02:39:20	39%
6	njuskalo.hr	classified ads	757 998	144 736 268	190.95	01:48:32	38.87%
7	vecernji.hr	news portal	595 980	33 331 752	55.93	02:00:23	30.56%
8	blog.hr	blog site	534 270	3 955 192	7.40	00:09:43	27.40%
9	bloger.hr	blog site	501 302	7 747 515	15.45	00:18:56	25.71%
10	dnevnik.hr	news portal	484 114	21 530 645	44.47	01:24:08	24.83%



Trends in 2011

Croatian online market is in majority made up of horizontal portals and, accordingly, they lead in the top 10 ranking, placing themselves at first three positions. The second important group of players are the news portals, which visibly gain on meaning in the region.

First among the blogging platforms, [blog.hr](#), was bought by NOVA (the Croatian commercial television network) 2 years ago. At the beginning of 2010, it reached almost 35% of the Croatian online audience; however, after a year its reach has declined by 5 percentage points. A similar situation can be observed in the case of the second player, [blogger.hr](#), which lost 3 percentage points in March 2011 as compared to March 2010.

Apart from portals and news services among the market leaders there is also a forum site ([forum.hr](#)) and classified ads site ([njuskalo.hr](#)). The former is the most popular, multi-thematic forum site which like [index.hr](#) does not belong to any large media group. For the last three years it has systematically reached approximately 39% of Croatian online internet users. [Njuskalo.hr](#), which ranks 6th this year, owned by Styria, is the most popular classified ads service.

Top 10 websites by reach in Slovenia



	WEBSITE	WEBSITE'S CATEGORY	NUMBER OF REAL USERS	NUMBER OF PAGE VIEWS	PAGE VIEWS PER USER	AVERAGE TIME PER USER (hr:mm:sec)	REACH
1	24ur.com	horizontal portal	746 121	106 315 153	142.49	06:21:01	56.79%
2	siol.net	horizontal portal	555 739	52 321 243	94.15	02:56:07	42.30%
3	rtvslo.si	horizontal portal	495 587	49 251 596	99.38	03:37:51	37.72%
4	najdi.si	search engine/ horizontal portal	492 006	47 046 193	95.62	02:25:55	37.45%
5	bolha.com	classified ads/auction	475 295	54 956 651	115.63	01:01:05	36.17%
6	itis.si	telephone register	397 519	3 585 031	9.02	00:07:37	30.26%
7	zurnal24.si	horizontal portal	388 260	37 295 344	96.06	01:55:00	29.55%
8	zadovoljna.si	women portal	374 334	5 313 580	14.19	00:12:11	28.49%
9	avto.net	classified ads	363 475	116 947 878	321.75	02:51:37	27.66%
10	vizita.si	health portal	340 960	2 909 809	8.53	00:07:32	25.95%



Trends in 2011

The Slovenian online market is largely dominated by horizontal portals and their popularity is still growing. The leader position in the ranking belongs to 24ur.com, and its reach is still increasing. Other horizontal portals occupy next three positions for the second year, just as the leader. However, najdi.si keeps on losing traffic due to an increased interest of the users in the Google search engine. Another horizontal portal in the study, zurnal24.si, is ranked 7th, the same position as in March 2010.

Bolha.com and avto.net are two classified ads portals popular among Slovenian internet users, which are gaining on the number of visitors every year. In March 2010, the former had a reach of over 35% and the latter nearly 27%. Itis.si, a telephone and companies register, came in 6th place - the same as in March 2010.

Zadovoljna.si, as compared with 2010, is growing in popularity. What is more, the website has outrun the following avto.net. This is most probably due to its acquisition by CME (Central European Media Enterprises) group, which is supporting all of its online portals through TV campaigns and advanced ad formats, making them more competitive.



- Different versions of the Microsoft's operating system dominate the markets. Windows 7 is gaining ground, mainly at the expense of Windows XP.
- Within last two years no spectacular reshuffles have been registered on the browsers market: Firefox is still the leader, Google Chrome notes a more dynamic increase and MSIE is gradually losing its position in the region.





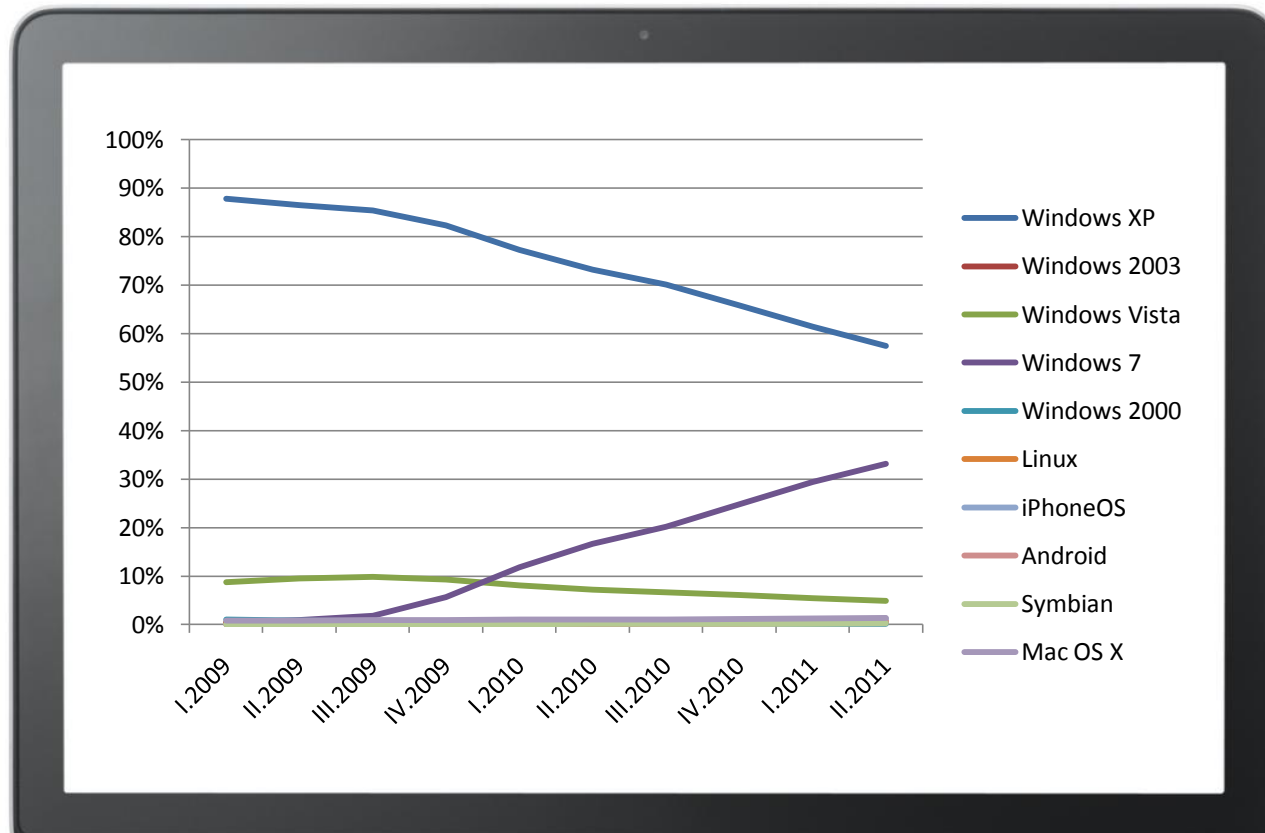
- In January 2011 Apple outran Nokia and became the new leader on the mobile devices market in Slovenia.
- In Croatia, Apple notes a more dynamic increase in comparison to Nokia, the meaning of which is gradually decreasing.

- The increase in the popularity of mobile devices as a means to surf the web results in an increase in the reach of the mobile browsers in general rankings.



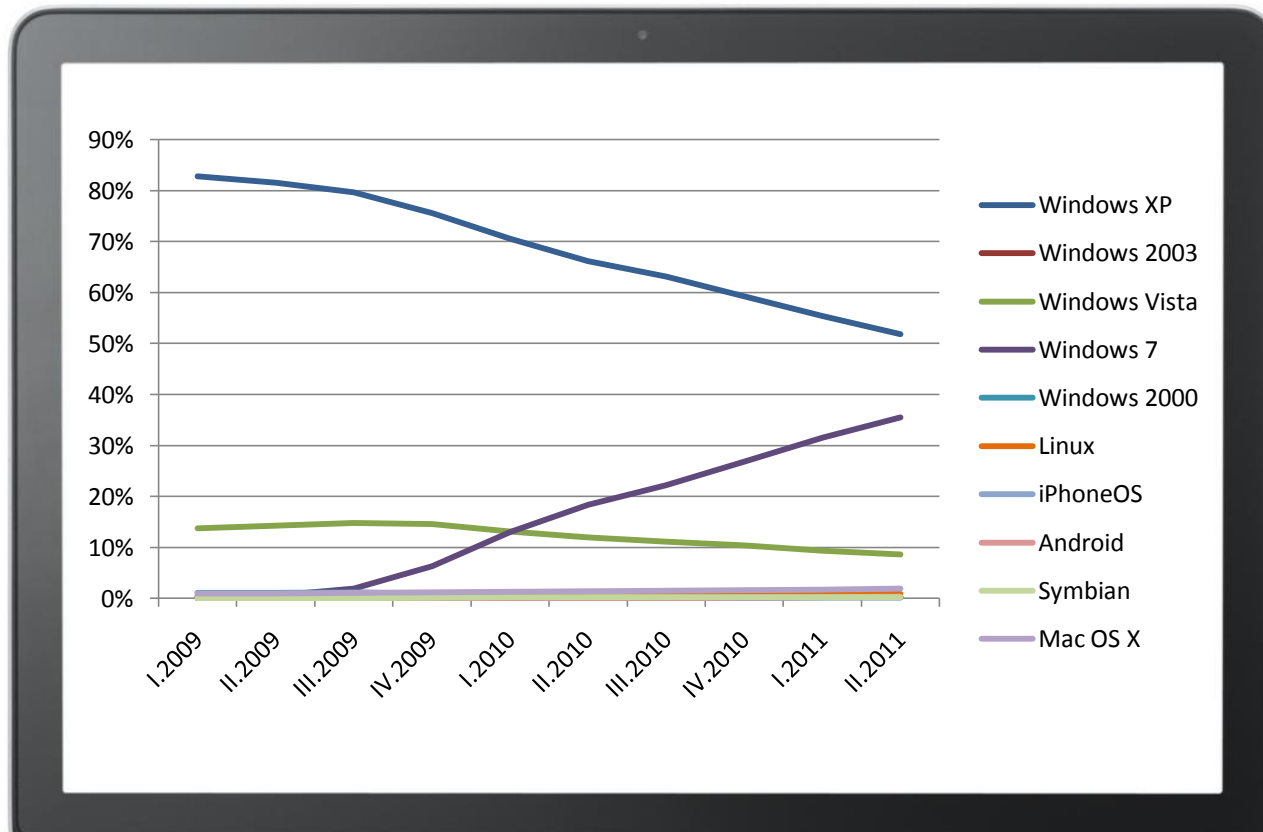


Changes in the OS popularity ranking in Croatia Leaders: Windows XP, Windows 7 and Windows Vista



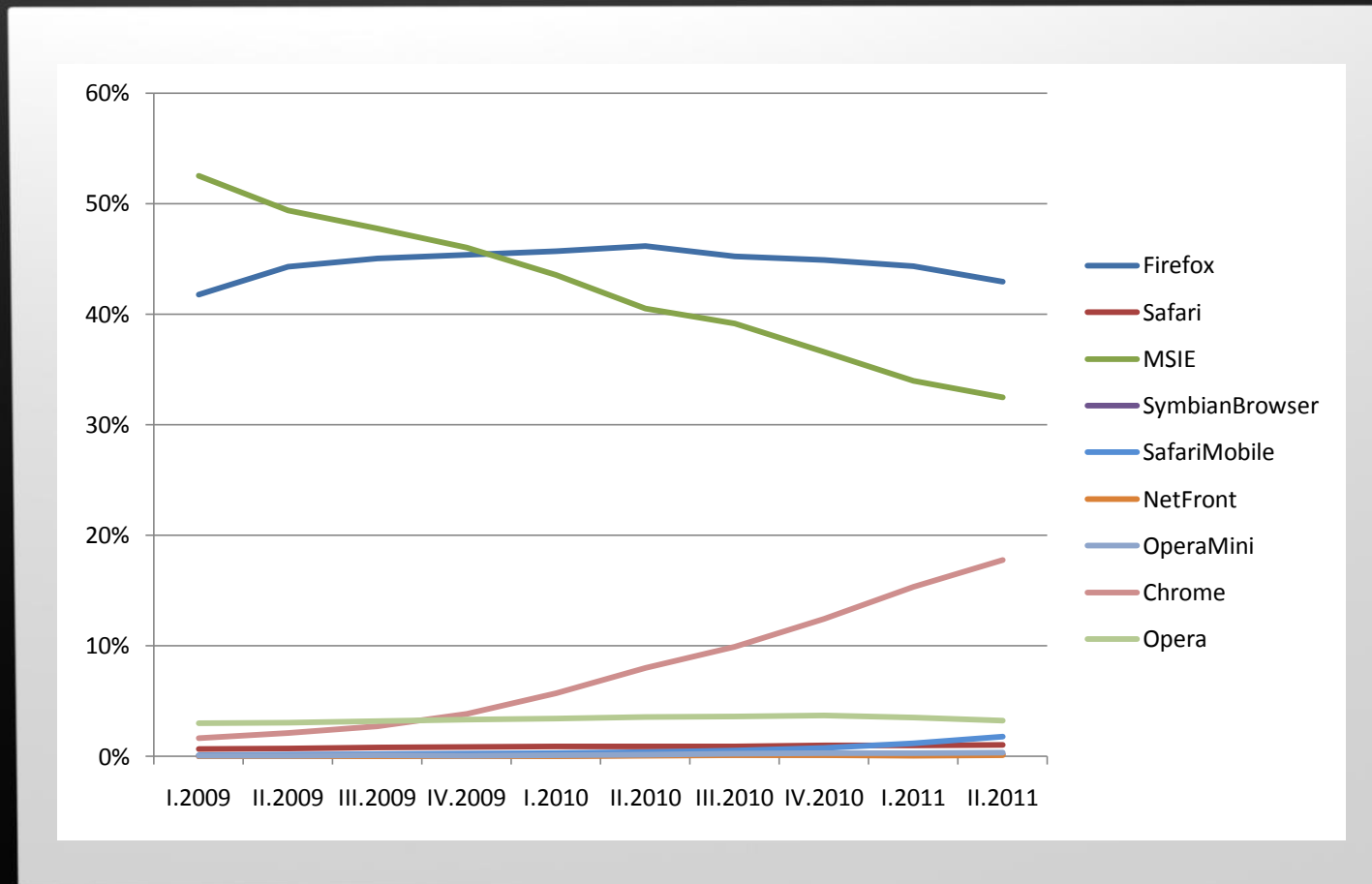


Changes in the OS popularity ranking in Slovenia Leaders: Windows XP, Windows 7 and Windows Vista





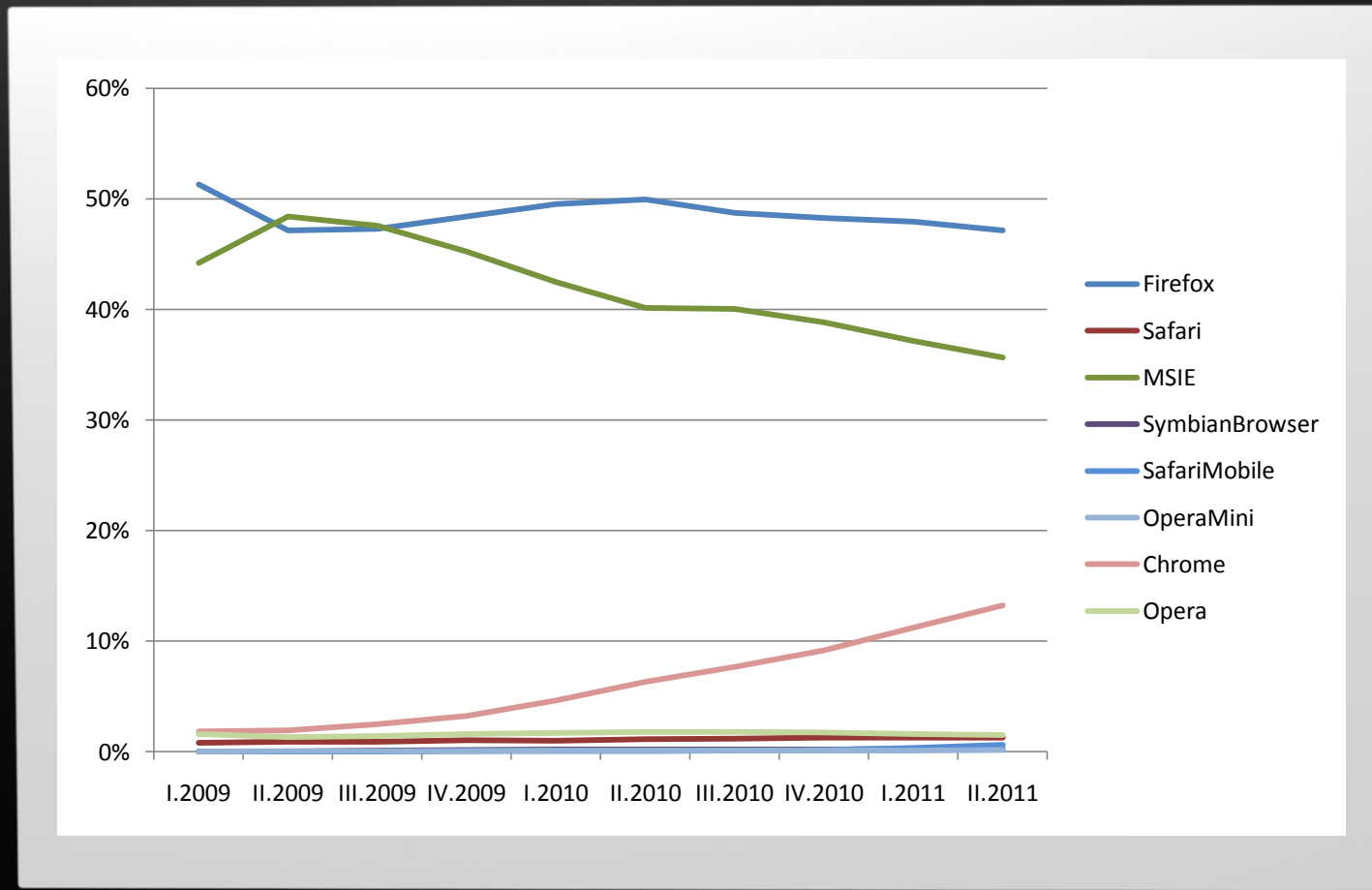
The percentage share of page views made with the most popular browsers groups



Source: Gemius/Valicon, gemiusTraffic, Q1 2009 – Q2 2011



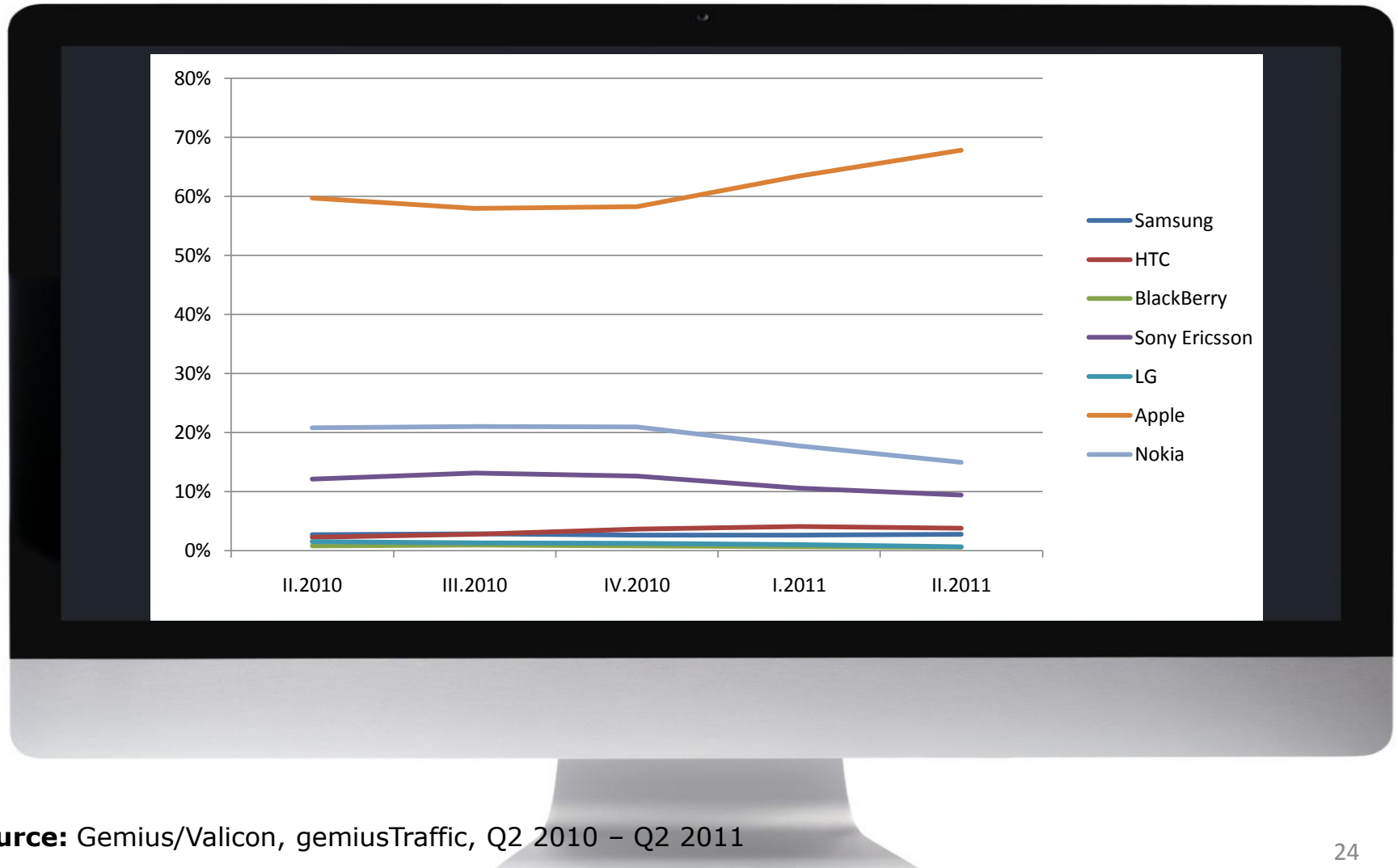
The percentage share of page views made with the most popular browsers groups



Source: MOSS-SOZ - Valicon/Gemius, Q1 2009 – Q2 2011

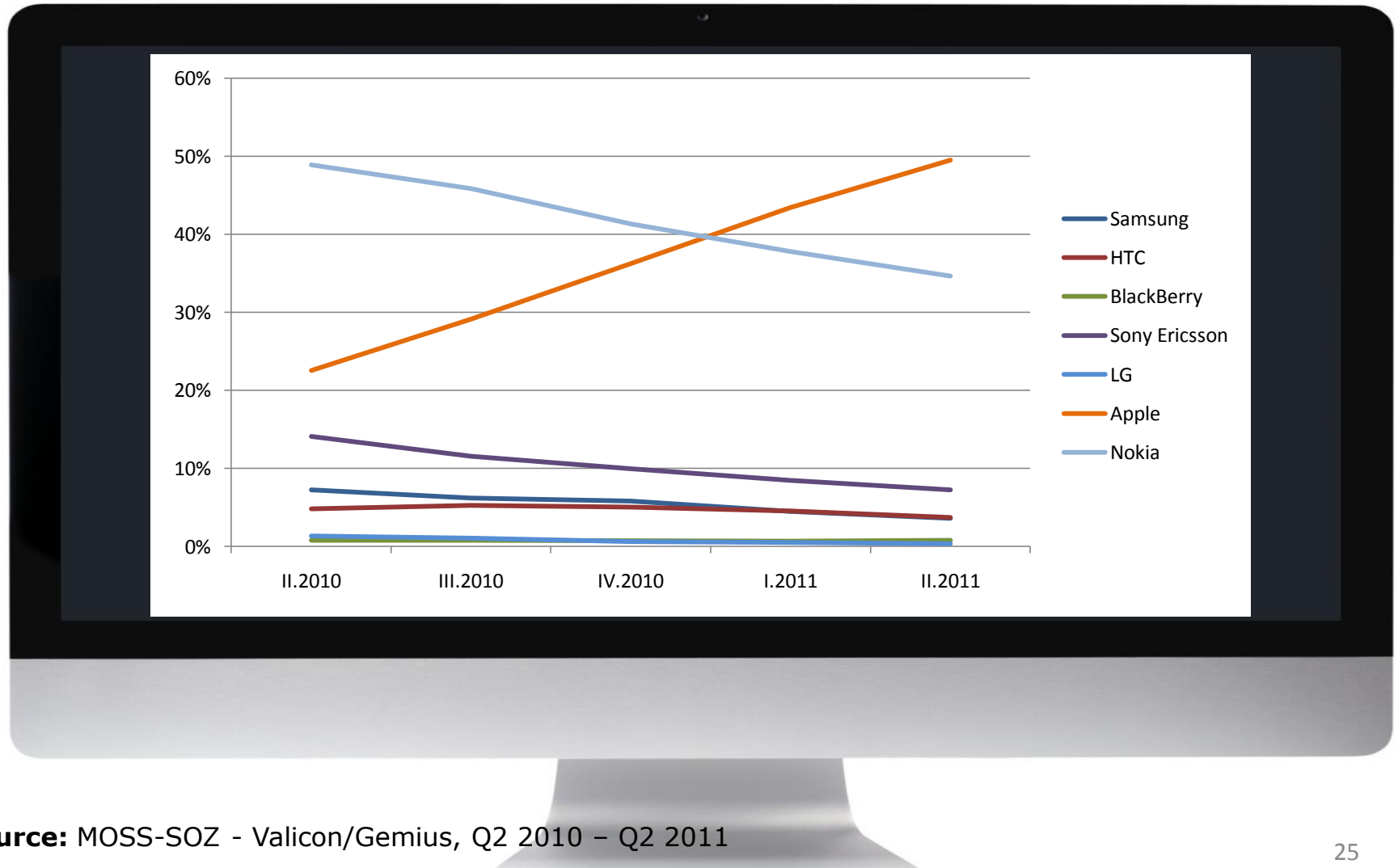


Percentage share of page views made with the most popular mobile devices (manufacturers)





Percentage share of page views made with the most popular mobile devices (manufacturers)



Contact us: marketing@gemius.com



Join us @

Facebook.com/GemiusGroup

Twitter.com/Gemius

Slideshare.net/Gemius_com

YouTube.com/WwwGemiusCom

