digitalSCOPE 2014

MEDIA CONSUMPTION
in digital society

Country report: Serbia

June 2015

Project partners

Leadership

Communication

Local research institute

Media partners

Executive summary

Gabrijela Stjepanovic
Executive Director
IAB Serbia

digitalSCOPE'2014 is a joint research project of IABs from 8 CEE countries (Bulgaria, Macedonia, Poland, Romania, Serbia, Slovakia, Slovenia and Turkey) managed and coordinated by IAB Poland. The local study is a product of partnership between IAB Serbia, MindTake and several Serbian online media partners.

One of the most prominent findings of digitalSCOPE2014 is that the internet has become more and more mobile in the entire region. The majority of Serbian internet users access the internet via their smartphones even though the penetration of smartphones and tablets in Serbia is below regional average. It is very important to understand that the role of fast-growing mobile internet in the purchase process is to support the decision-making and not necessarily to complete a purchase with a mobile-based transaction. This purchase-supporting role should not be neglected by the marketers when planning a successful digital campaign.

Another very important Serbian trend that surfaced as a result of this research is media multiscreening which is one of the highest in the region. The fact that 85% of internet users surf the internet while watching TV needs to be taken into consideration from the business and marketing perspectives. Internet has become a life-style and it is by far the most relied upon source of information for the consumers purchase decisions.

Participants

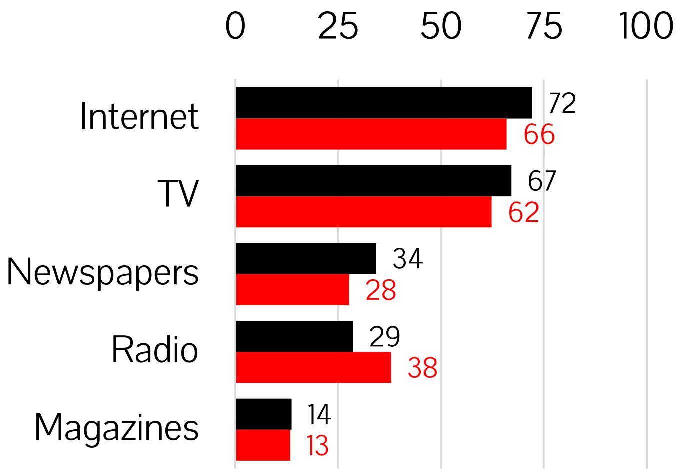
Central &
South-Eastern
Europe
(C/SEE)

Bulgaria
Macedonia
Poland
Romania
Serbia
Slovakia
Slovenia
Turkey

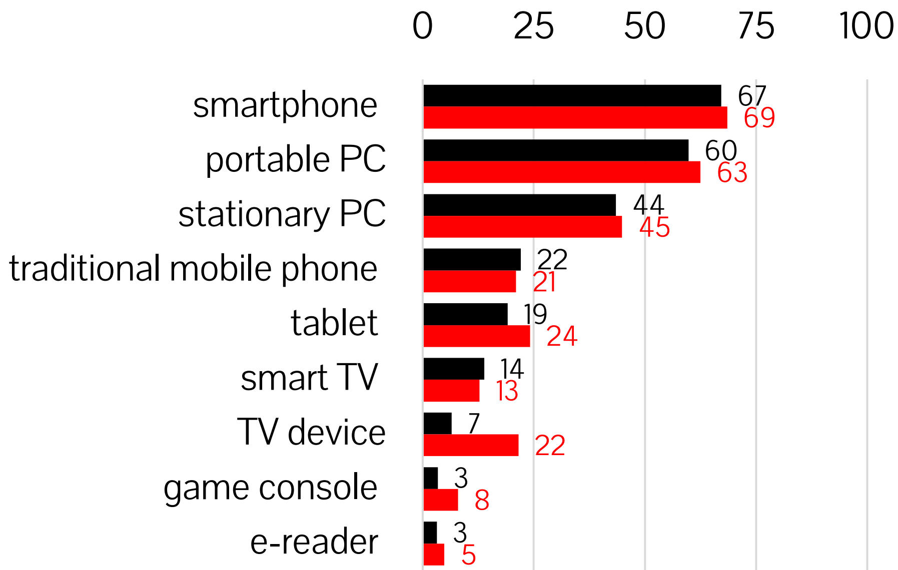
Key results

Serbia ■
C/SEE ■

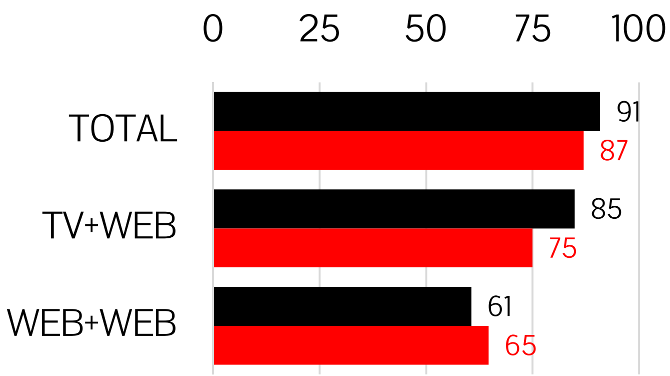
Daily access to media



Access to devices



Multi-screening levels



Purchase (last 6 months)

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Methodology

Serbia

Technique:	CAWI (Computer Assisted Web Interviewing)
Recruitment:	Real Time Sampling, Run On Site: inventory of media partners
Reach in online population 16+:	>75% (source: gemiusAudience)
Fieldwork:	14 Nov. 2014 – 6 Feb. 2015
Research institute:	MindTake
Researched population:	Above 15 years old
Sample:	N=4 954, representative, weighted
Weighting:	Gender, age and internet usage frequency (basing on Eurostat)

Sample sizes

MAIN SAMPLE AND SUB-SAMPLES (unweighted)	**Serbia**	**C/SEE**
All internet users:	4 954	22 108
Device users:		
– smartphone	3 460	16 348
– traditional mobile phone	1 191	5 500
– stationary PC	2 400	10 891
– portable PC	3 103	15 413
– tablet	998	6 273
– e-reader	149	1 382
– game console	131	1 028
– smartTV	812	3 799
– TV device (decoder, set-tup-box with online connection)	358	2 824
Traditional media users:		
– TV	4 658	20 511
– newspapers	4 391	18 966
– magazines	3 987	18 572
– radio	3 752	18 029

Experts' comments (5/5)

Local internet users seem to be focused on online information sources, and they are spending more and more time on research. We now see that perception of online shopping is finally changing, and this seems as the market segment with the largest potential in the next few years. Other than that, it is clear that our market is very similar to neighbouring CEE markets. User activities and consumer habits are almost identical in many fields. The key differences lay in the use of high-end technologies and latest devices and services. The potential of the local market is slowly growing, and further developments in this area can be expected.

Ivan Minic
Managing Director

BUREK FORUM

Experts' comments (3/5)

Omnipresence – natural advantages of the internet, speed and amount of information, now revolutionary improved with mobile devices, allow users to 'carry information in their pockets'. The internet jeopardized half-century domination of TV, and left far behind print media and radio. Trust – interactivity and possibility of crossing sources of information without additional investments made the internet a medium in which users have the highest confidence (see: page 36). With a fact that a quarter of users are online for over five hours a day and a half of users more than three hours (page 18), it is on publishers and agencies to present to the advertisers that maybe, by inertia, the share of the internet on the market is much less compared to what it offers both to users and advertisers.

Jasmina Koprivica
Director of Web Portal

Experts' comments (4/5)

digitalSCOPE, no matter its complexity, needed to be done. In order to prevent different methodologies and interpretation of results, this research is unique and it was used in several countries under the same methodology. Some results are a pleasant surprise which gives us hope for online market development in Serbia. Still, there are undermining facts in the way of internet usage.

First fact is that we are still dominant 'TV nation', even if we have highest internet access rate. Using smartphones has very nice growth rate, but people are using them mostly for social networking. One of important reasons for low visits of brand web sites via smartphones is lack of mobile friendly/responsive web sites. There are just a few brand web sites presented with mobile app and/or mobile friendly version. At work, most of people use desktop computers and tablets are weak competitors to them.

Well known and now approved fact with digitalSCOPE is that most of us are using more than one device at the same time (for example TV & cell phone).

Second fact is that beside high internet access rate, e-commerce development is not following this growth. A small group of advanced internet users are 'hungry' for online shopping, but the other, bigger group, are traditional in-store shoppers who are not fast adopters. Building trust in online shopping, new opportunities are arising for brands and the internet will become new and important sales channel for companies.

Andrijana Mazinjanin
Display and Video Advertising Section Coordinator
infostud
grupa korisnih sajtova

Experts' comments (1/5)

With more users than ever coming online, on every screen, and also with the increased impact of the internet on consumer behavior, Serbian market is getting close to its full potentials. Although I can't really forecast any dramatic rise in ad-spent in the next couple of years, it's easy to see that we will witness real boom of e-commerce and much stronger role of mobile in it.

Ultimately, I hope to see greater demand for high-quality local content (video especially), both from users and advertisers, which can drive all stakeholders of the market to deal with fundamental threats.

Velibor Antic
Chief Executive Officer

SHAREBERRY
WE DELIVER STORIES

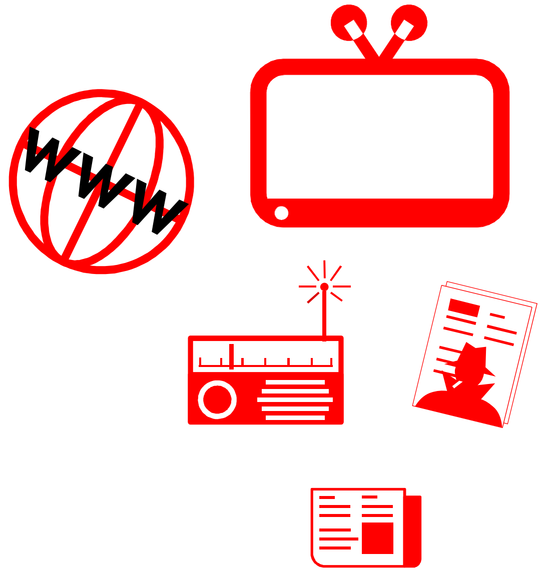
Experts' comments (2/5)

There has been more extensive use of smartphones and portable PC that have become IT "twins" in the communication of a modern man - businessmen, but even more popular with young people in the process of education on all levels or those without a job. Internet 'invasion' through PC, phone, tablet is becoming a ruler of our active working time but also of our free time which is 'drowning' in a loss of privacy or our business and personal world is 'drowning' in the power of global technology. The second influential media is TV, which together with the internet is an absolute ruler of time and activity of questioned groups. Commitment to the internet and other digital means of communication, decline in newspaper writing and the rise of digital editions indicate a change in civilizational values primarily among the younger population and those of middle age.

Nikolaos Arvanites
Content Editor

palo The new|s reading experience

MEDIA USAGE

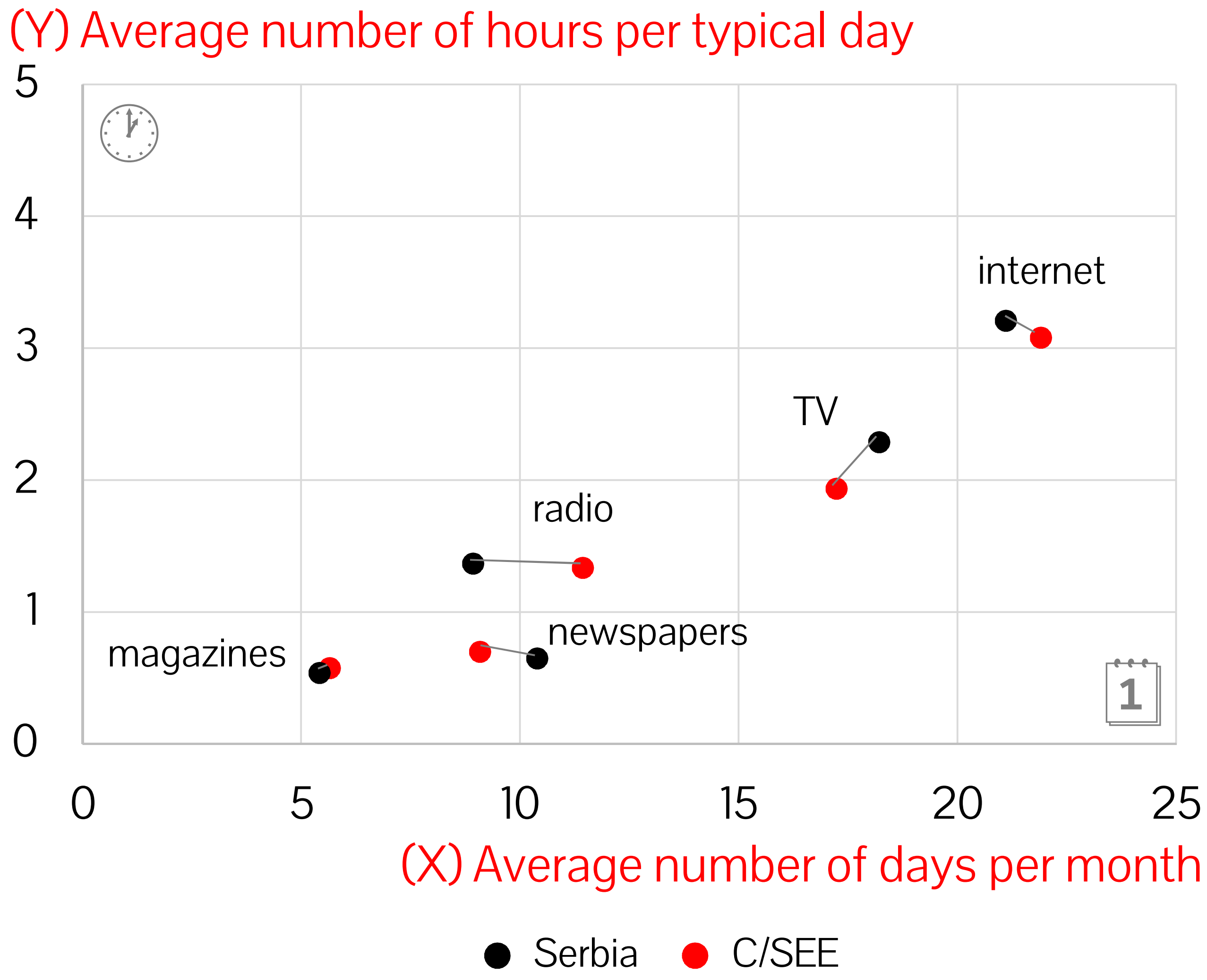


To guarantee representativeness of the researched sample and comparability between countries, digitalSCOPE data were weighted with regard to internet usage frequency. Eurostat data were used as a point of reference.

Media usage – summary

Average time and frequency estimated on the basis of declarative questions: M3, U5, O1, O3 (see: next slides)

All internet users
%



Access to media – frequency

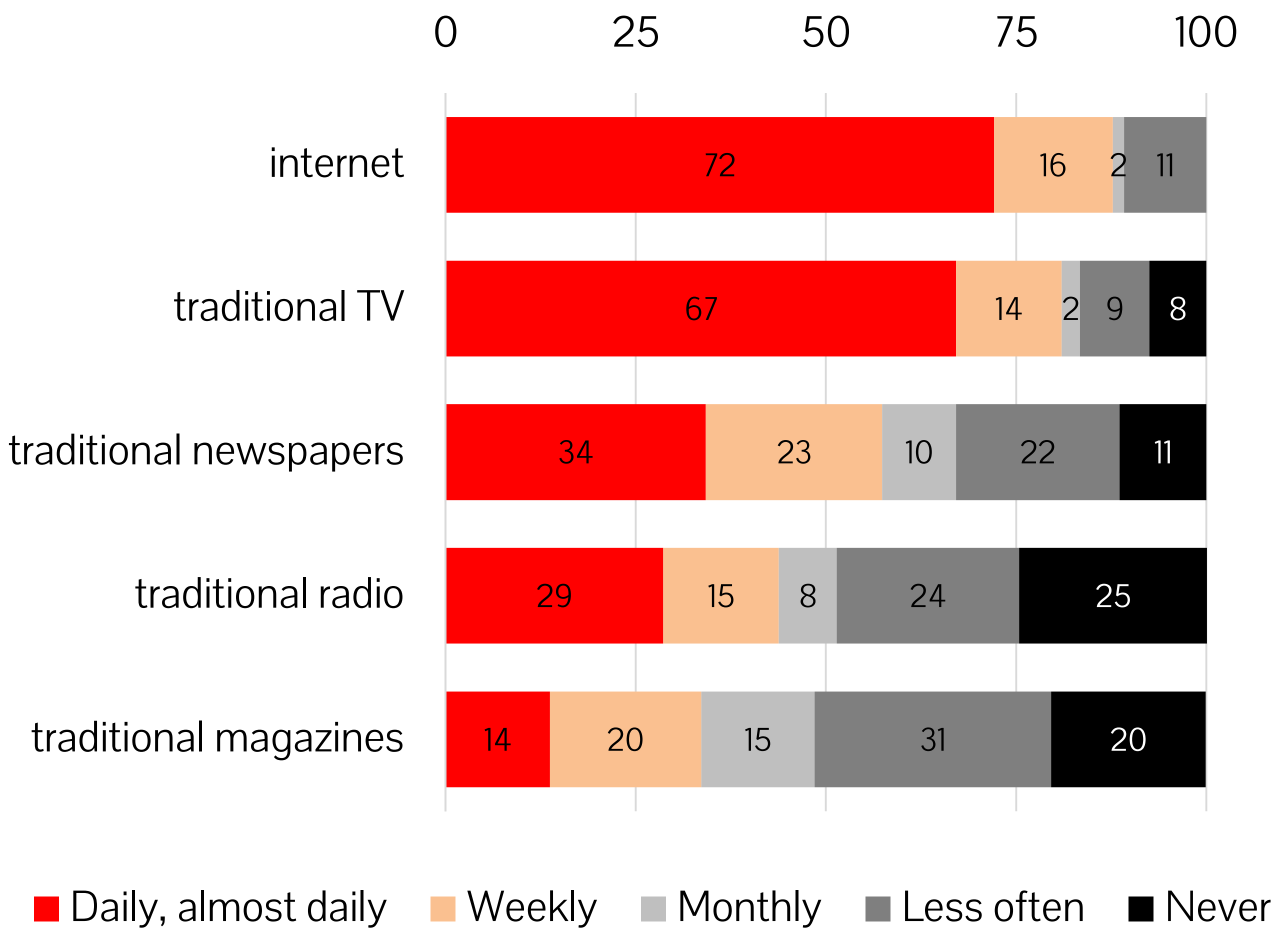
Qs:

M3. How often do you use the internet?*

U5. How often do you use… (LIST OF TRADITIONAL MEDIA)?

All internet users
%

** Weighted according to Eurostat data*



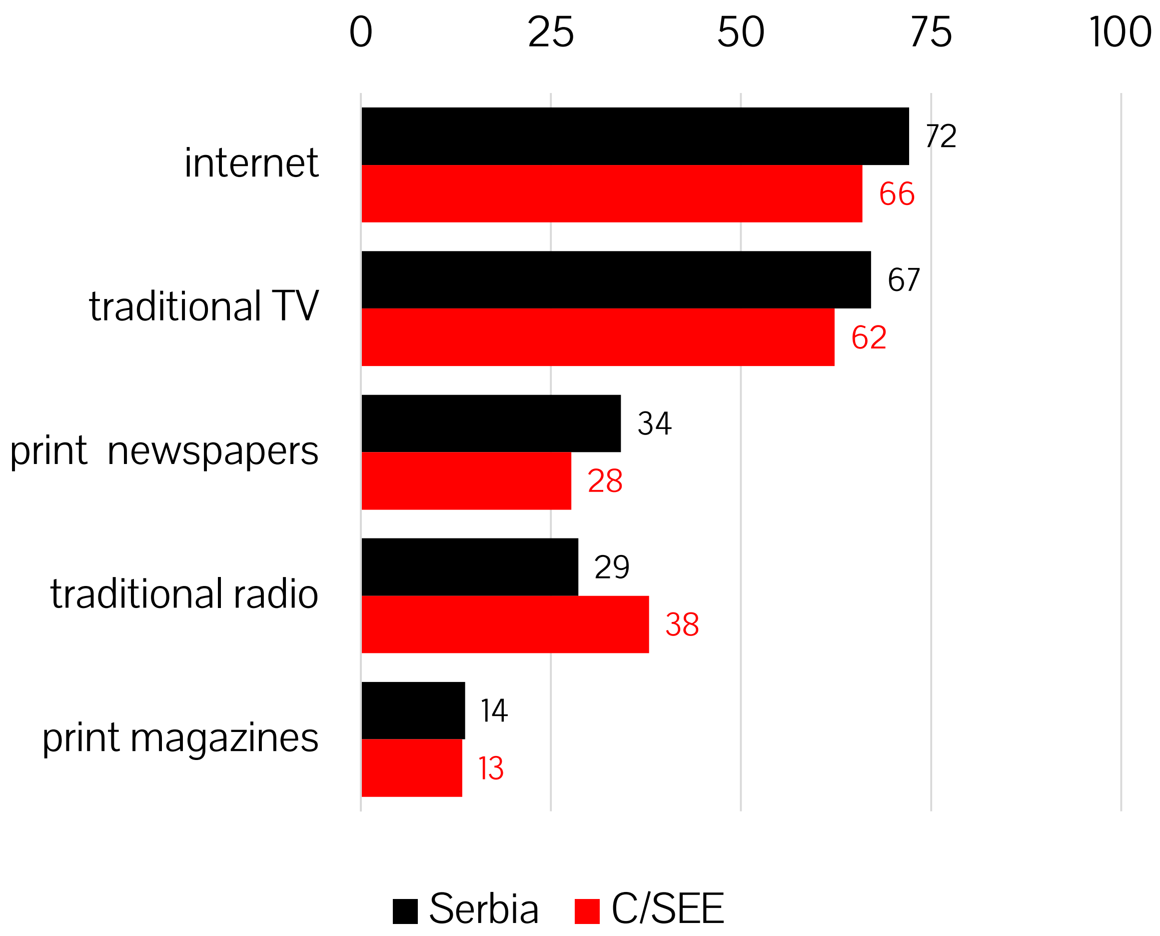
Daily access to media

Qs:
M3. How often do you use the internet?* – 'a few times a day' + 'every day or almost every day'

U5. How often do you use… (LIST OF TRADITIONAL MEDIA)? – 'a few times a day' + 'every day or almost every day'

All internet users
%

** Weighted according to Eurostat data*



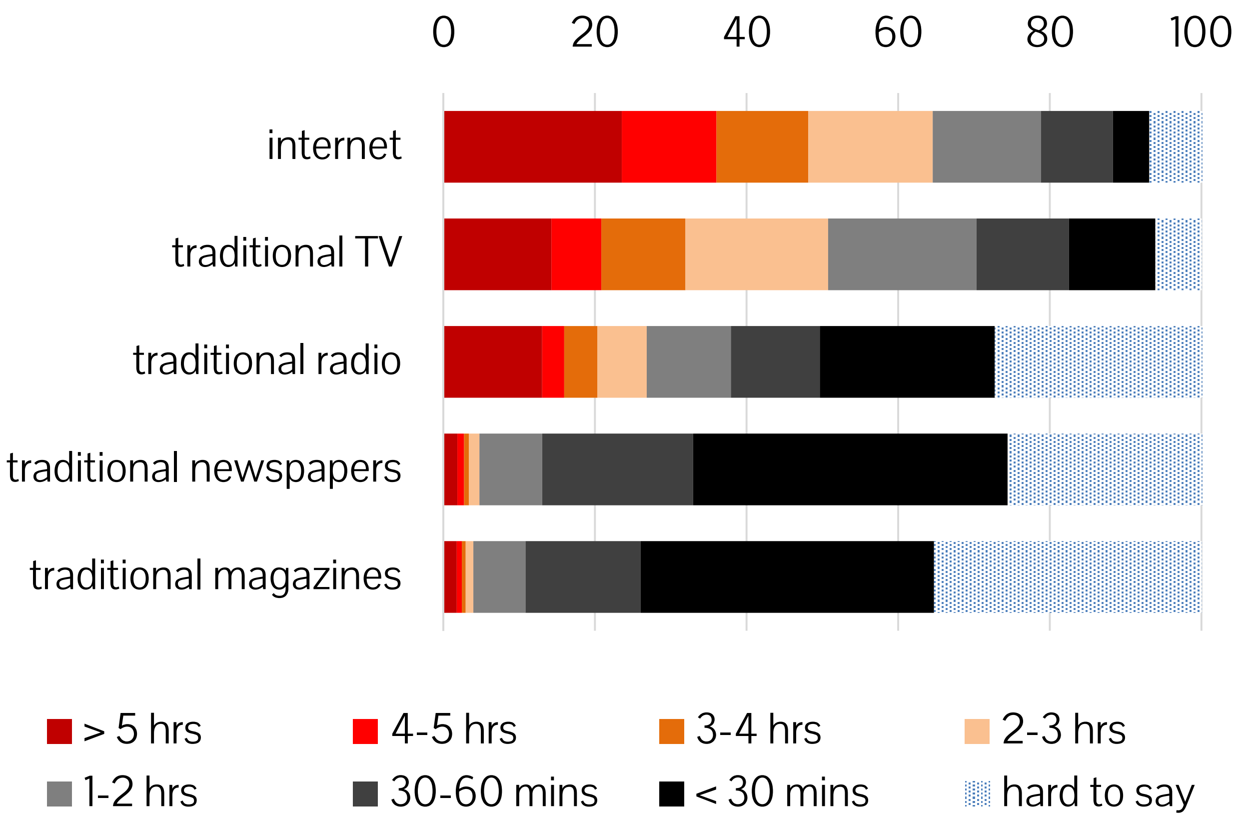
Daily time spent per media

Serbia

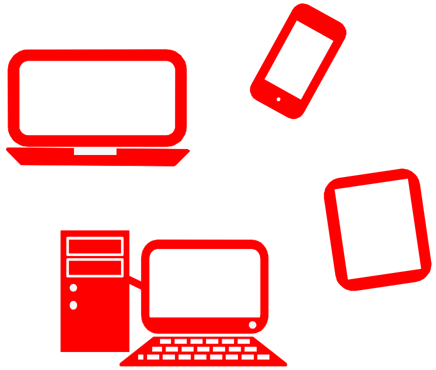
Qs:
O1. On an average day that you use the internet, how much time do you spend online?

O3. On an average day that you use the following media, how much time do you spend with: (LIST OF TRADITIONAL MEDIA)

Filtered: media users (excluding 'never')
%



ONLINE DEVICES



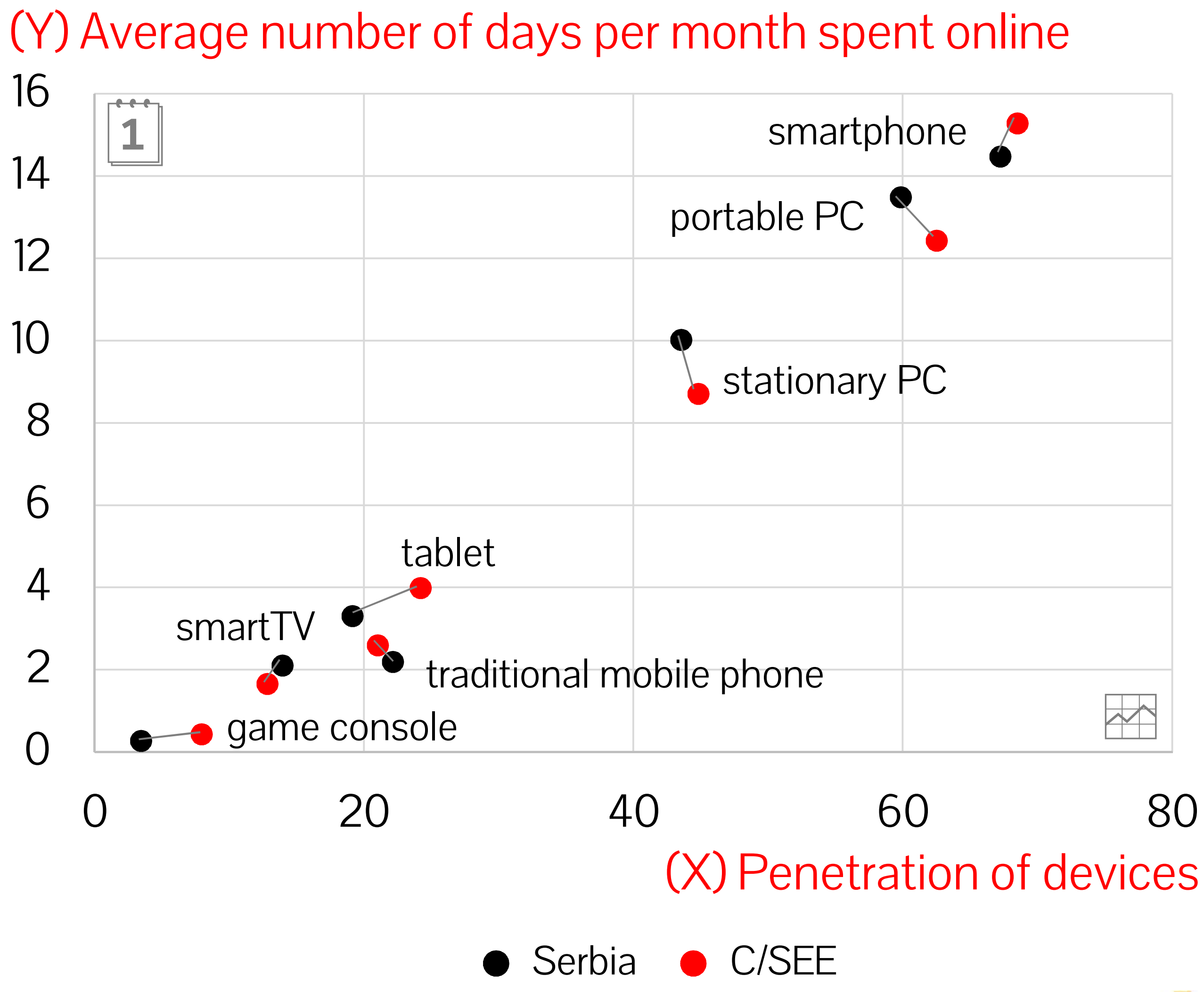
‘Smartphone’ includes declarations prompted with the following features:

- tactile screen or qwerty keyboard,
- ability to use:
    - internet,
    - navigation,
    - applications,
    - social networking services.

E-media usage – summary

Frequency estimated on the basis of declarative question: U3 (see: next slides)

All internet users
%

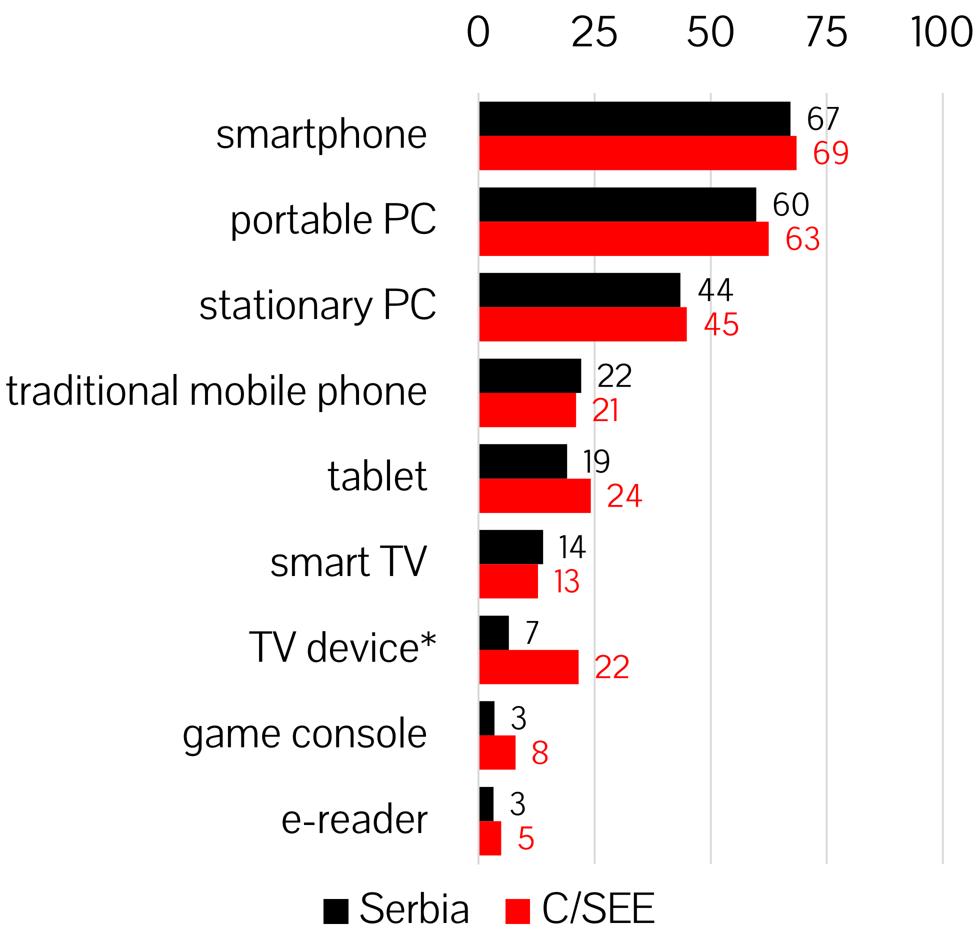


Access to devices

Q:
U1. What electronic devices do you use at least from time to time?

All internet users
%

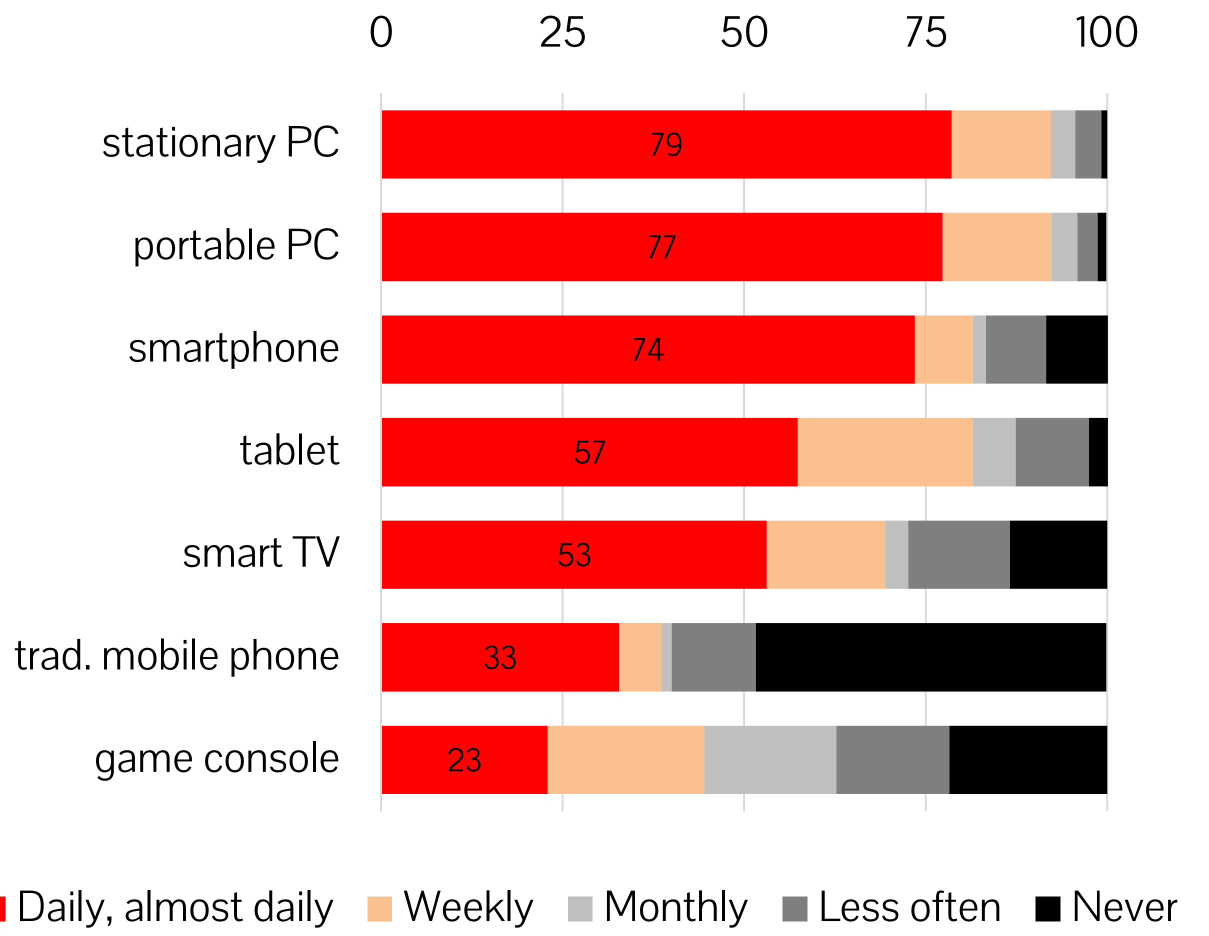
** TV device = TV decoder, set-top-box with online connection (e.g. Blu-Ray)*



Access to internet – frequency

Q:
U3. How often do you use the internet via the following devices?

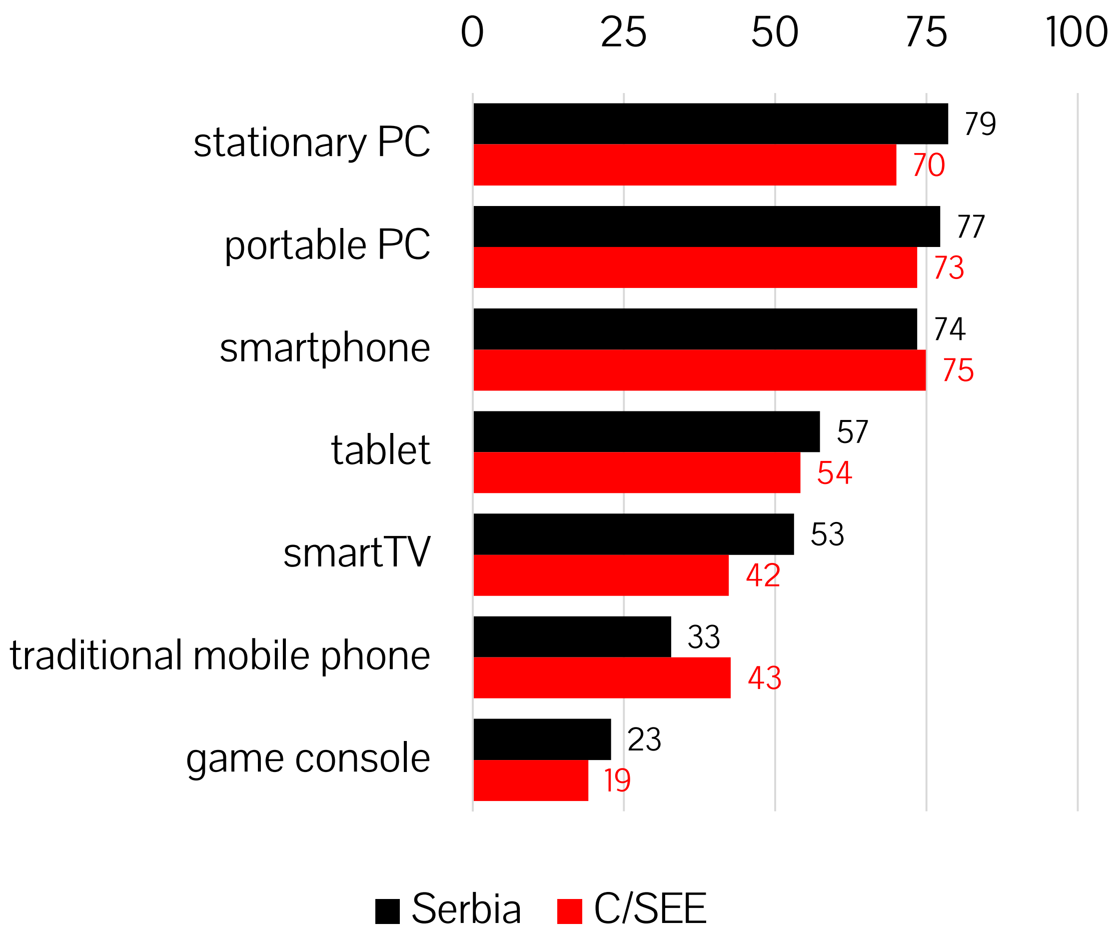
Filtered: device users
%



Daily access to internet

Q:
U3. How often do you use the internet via the following devices? – 'a few times a day' + 'every day or almost every day'

Filtered: device users
%



MULTI-SCREENING

Multi-screening index is a synthetic indicator based on questions covering various simultaneous behaviors – both between internet and traditional TV (TV+WEB) and between various devices connected to the web (WEB+WEB).

Multi-screening

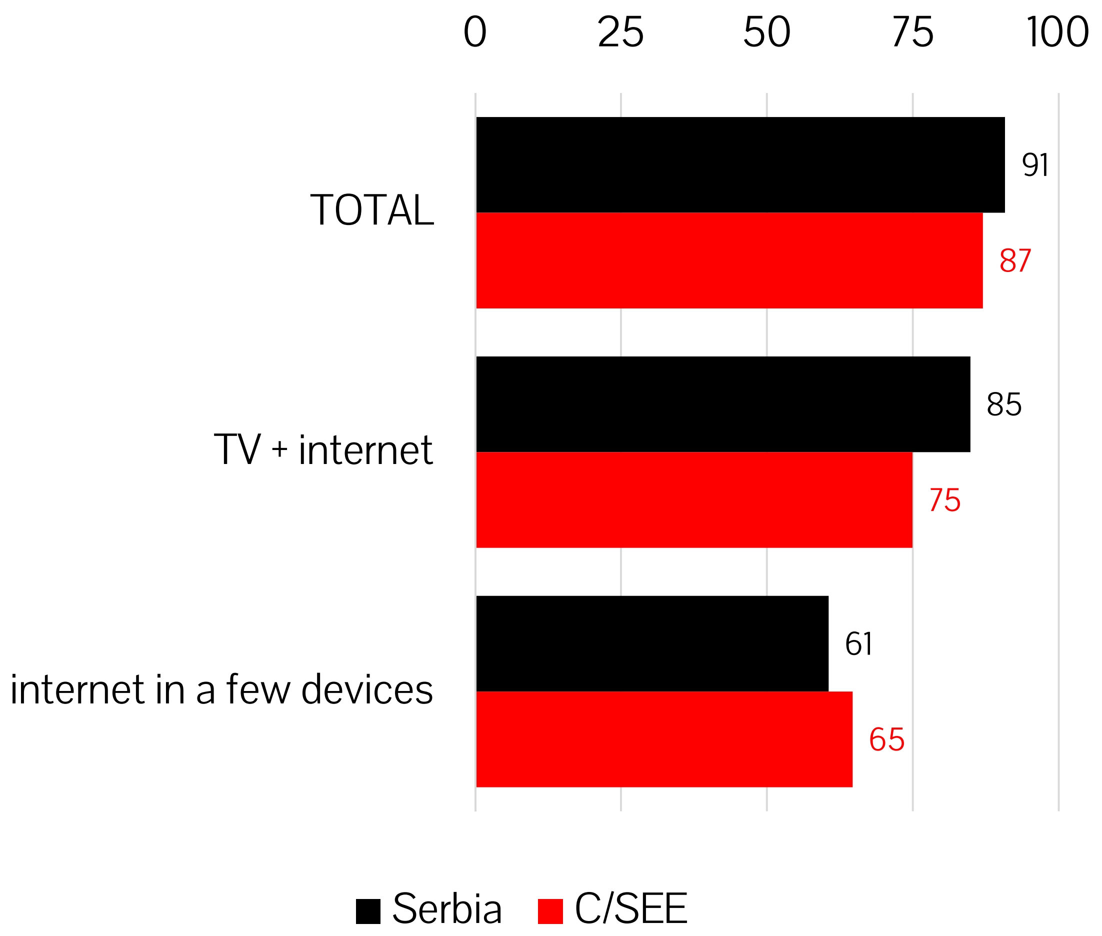
Qs:

MS1. How often – when using the internet – do you watch traditional television (without access to the internet), e.g. TV is in the background?

MS2. How often do you use the internet via a few devices at the same time (e.g. you are surfing the computer and checking your email via your phone)?

MS3. How often - when watching traditional television (without access to the internet) – do you use the internet in the following devices?

All internet users
%

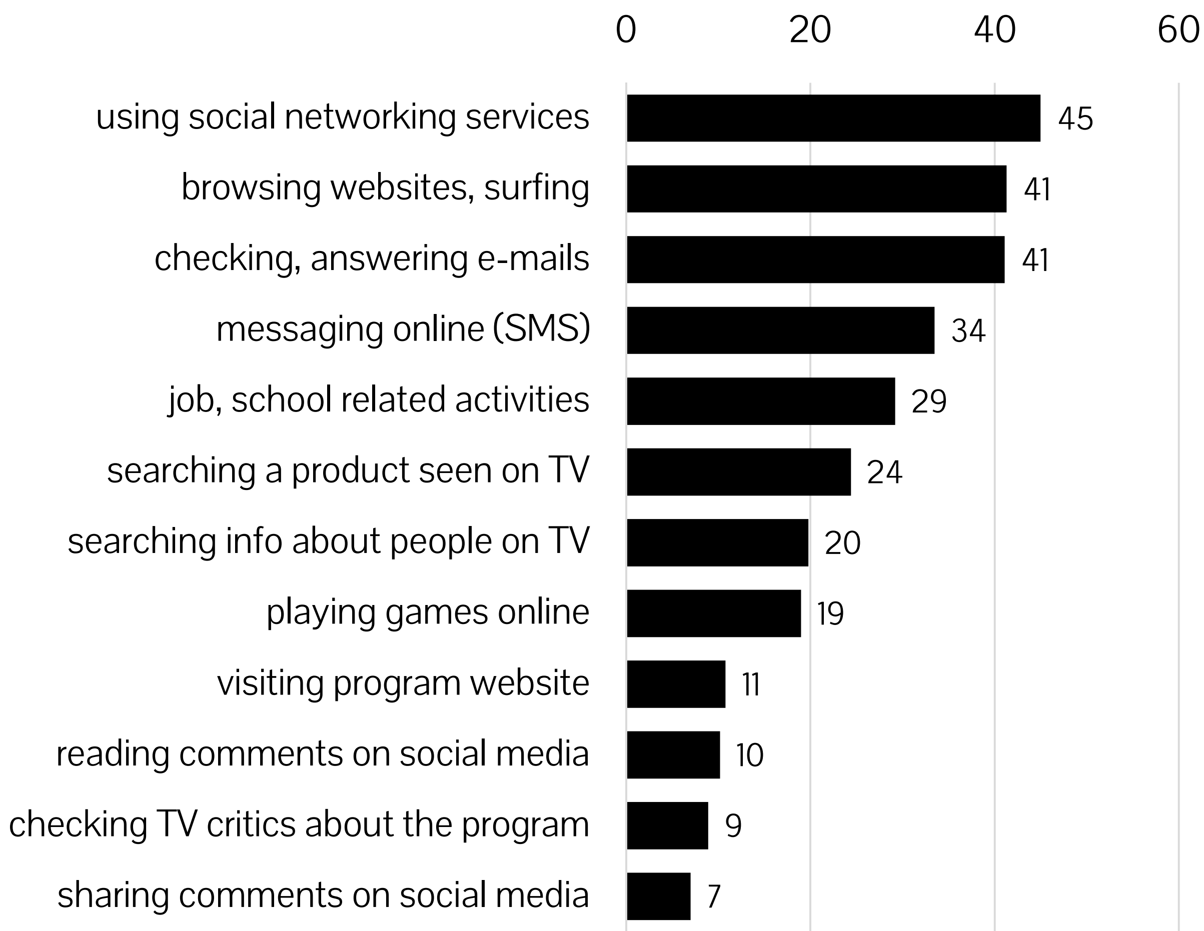


Activities online when watching TV

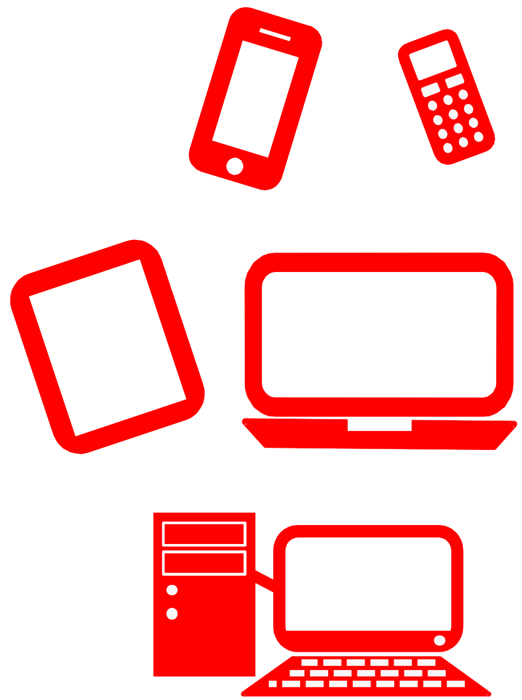
Serbia

Q:
MS4. Which of the following activities do you perform on the internet while watching a TV program (e.g. TV series, documentaries, news etc.) on traditional television (without access to the internet)? Please mark the activity even if you perform it occasionally.

Filtered: multi-screeners (TV+WEB)
%



ACTIVITIES ONLINE



Analyses of online activities are based on the most typical activities, performed most frequently on particular devices.

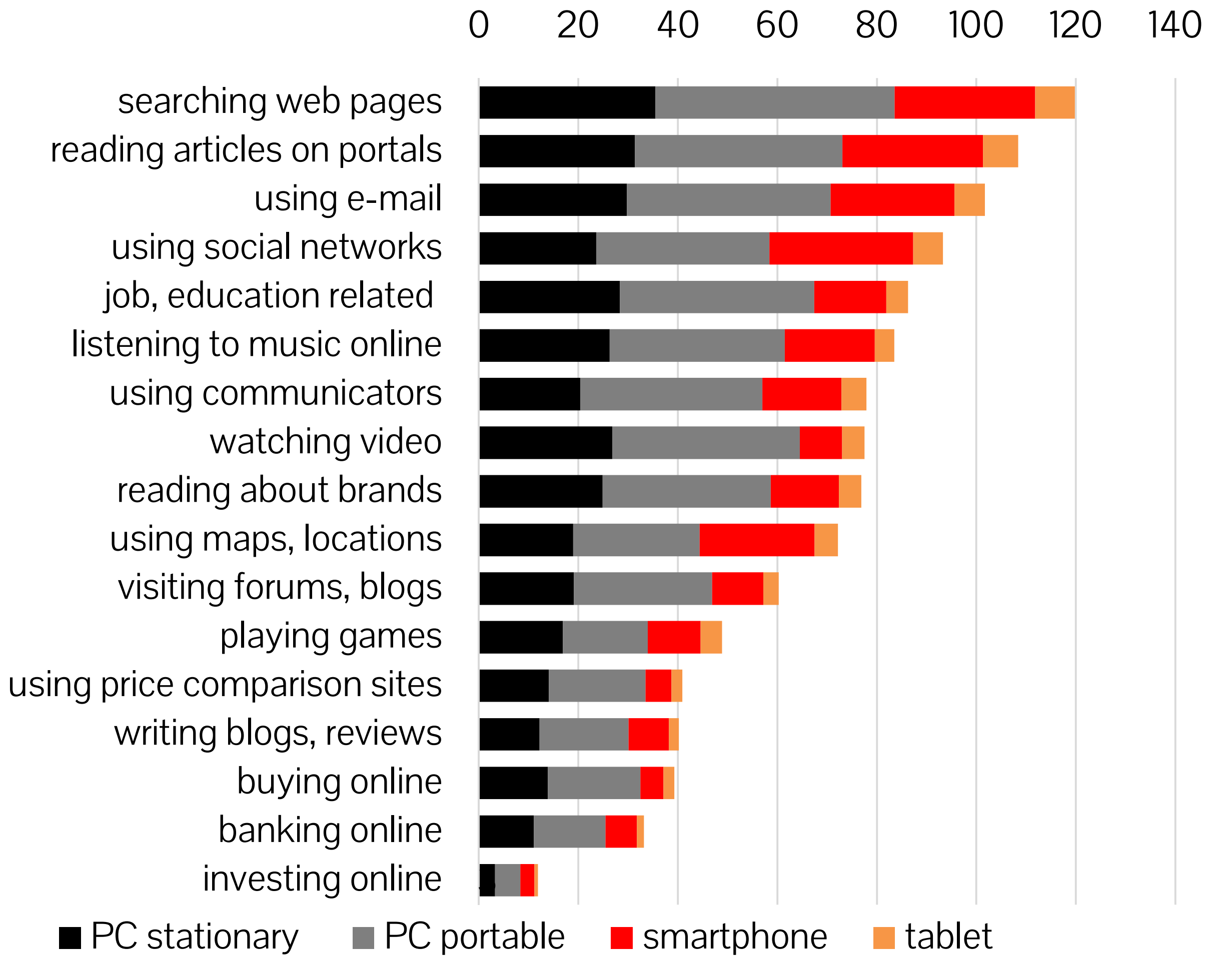
Typical activities online – devices

Serbia

Q:
U4. What do you usually do on the internet via particular devices? Choose the most frequent activities.

All internet users

Cumulative %



Typical activities online – summary

Serbia

Q:
U4. What do you usually do on the internet via particular devices? Choose the most frequent activities.

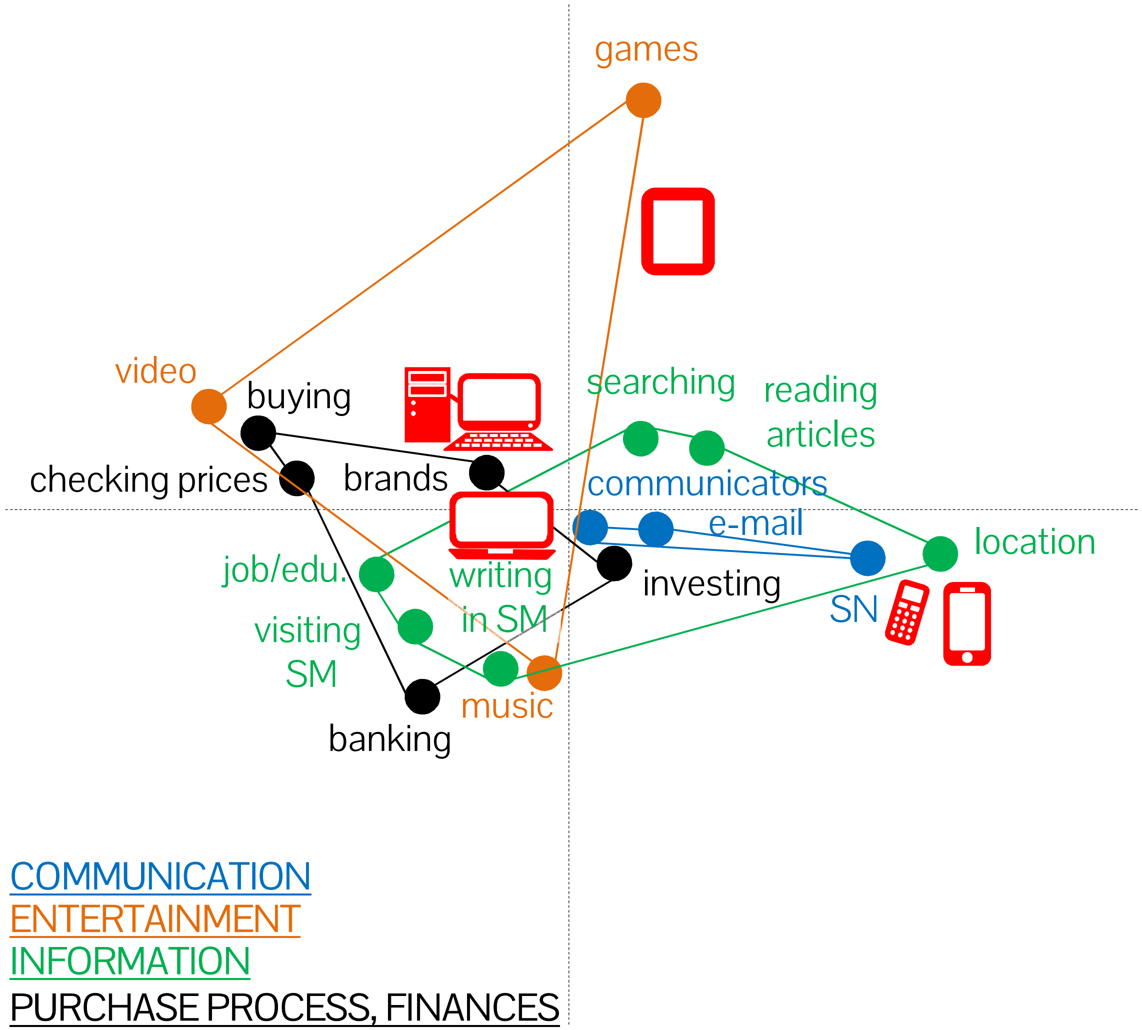
Filtered: devices users

Acronyms

- Brands – reading about brands
- SM – Social Media (blogs, forums etc.), excluding SN
- SN – Social Networks

Correspondence analysis

Activities on the same side of axis as a device are relatively more typical for the device. The closer to the intersection of the axes', the smaller the difference.



CONSUMER JOURNEY ONLINE

Consumer Journey Online focuses on 'e-consumers' – internet users who spent money (online or offline) on any product or service during 'last 6 months'. Each respondent described one category randomly chosen from those purchased (see: ‘Purchase Potential’).

Sources of information – summary

Serbia

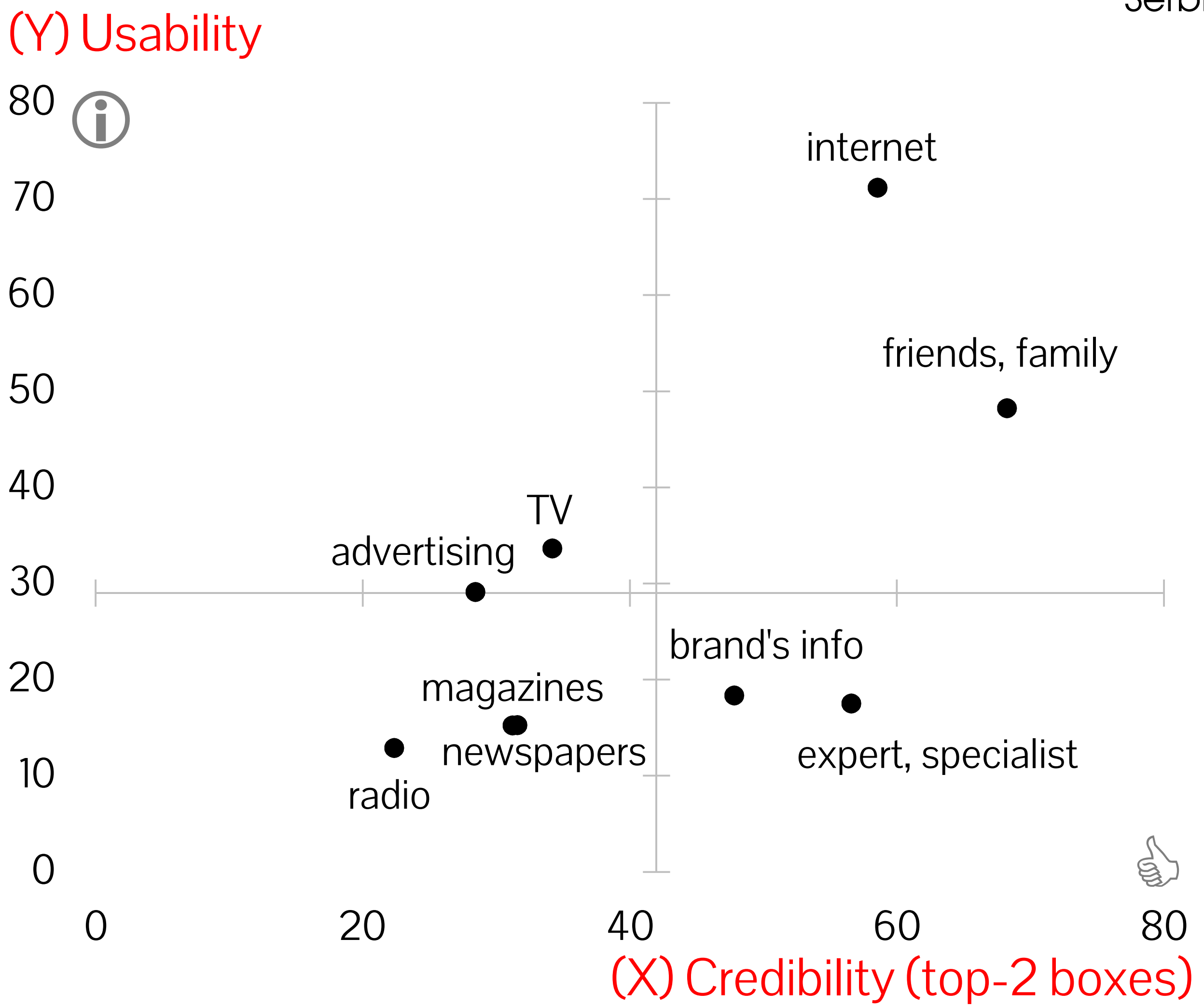
Qs:
CJO4. Mark all sources of information you learn about (SELECTED PRODUCT/SERVICE CATEGORY) from.

CJO8. To what extent are the following sources of information on (SELECTED PRODUCT/SERVICE CATEGORY) credible for you?

Filtered: e-consumers

Average % for all categories

Intersection of the axes represents means of all researched media

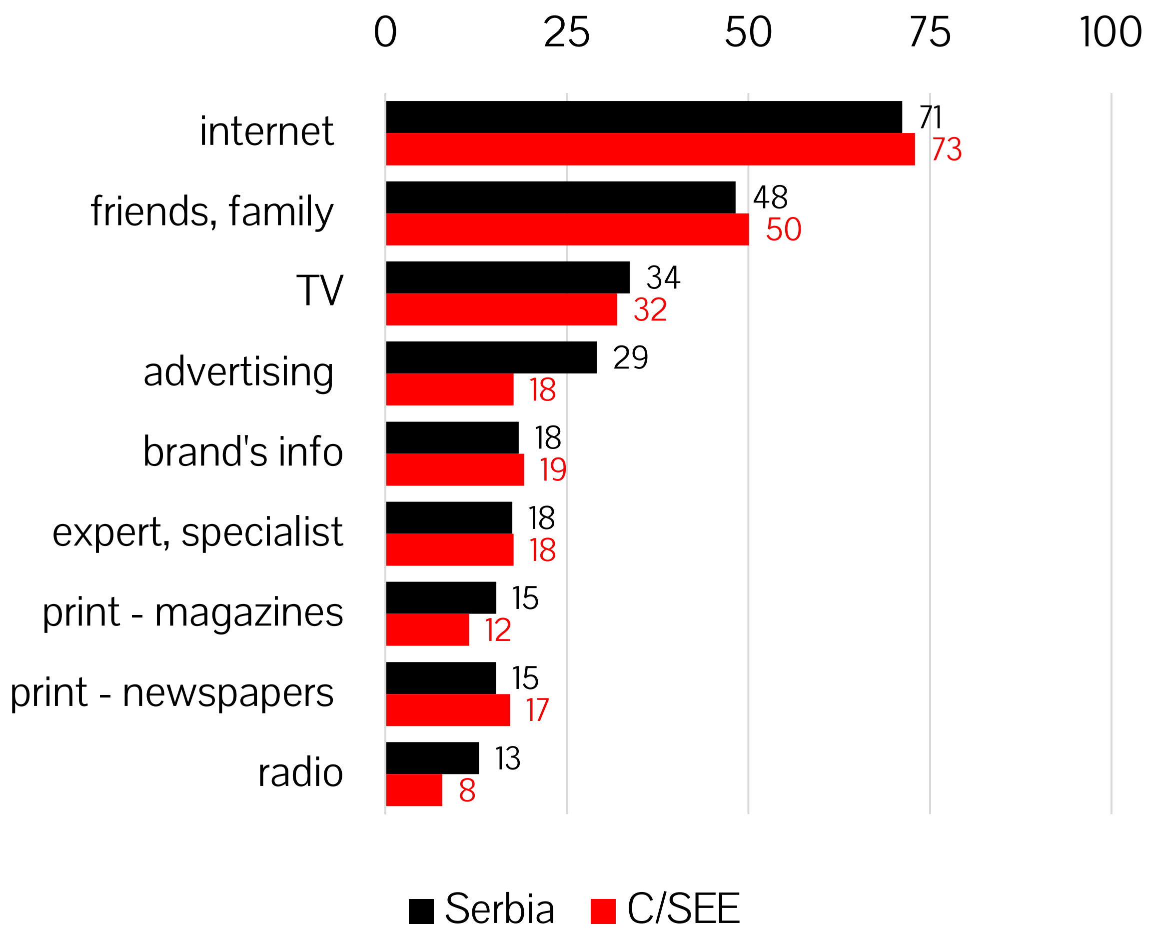


Sources of information – usability

Q:
CJO4. Mark all sources of information you learn about (SELECTED PRODUCT/SERVICE CATEGORY) from.

Filtered: e-consumers

Average % for all categories



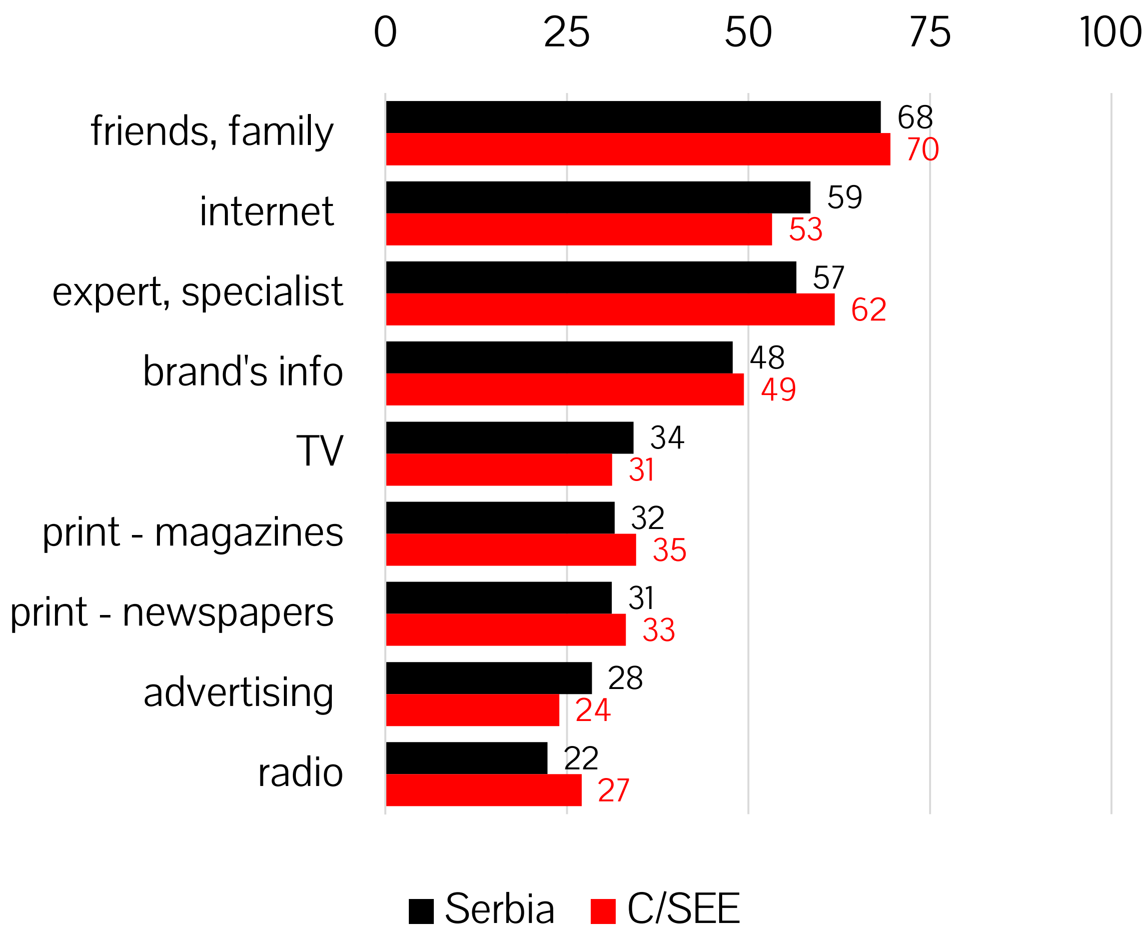
Sources of information – credibility

Q:
CJO8. To what extent are the following sources of information on (SELECTED PRODUCT/SERVICE CATEGORY) credible for you?

Top 2 boxes = ‘definitely credible’ + ‘rather credible’ (5-POINT LIKERT SCALE WITH ‘HARD TO SAY’ OPTION)

Filtered: e-consumers

Average % for all categories



Internet VS offline triggers

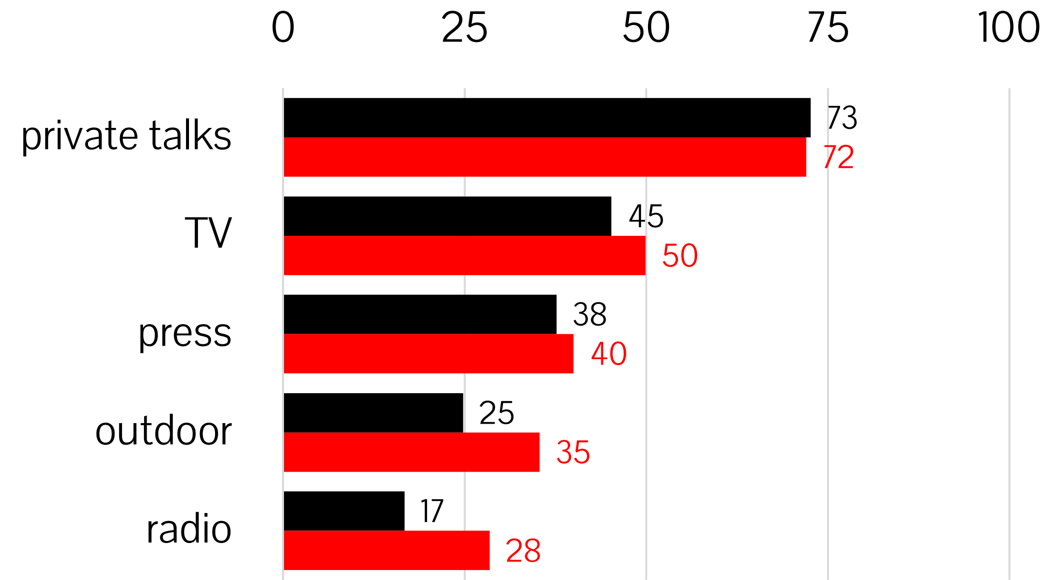
Qs:
CJO9. Does it happen that you read, watch or search internet to find information on (SELECTED PRODUCT/SERVICE CATEGORY) under the influence of (LIST OF MEDIA)

CJO10. Are there any (SELECTED PRODUCT/SERVICE CATEGORY) you found out about for the first time from the internet?

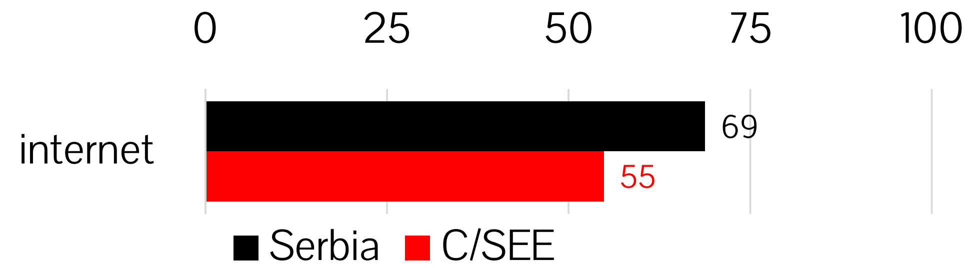
Filtered: e-consumers

Average % for all categories

Offline triggers to consumer journey online



Internet as the first touchpoint with a brand

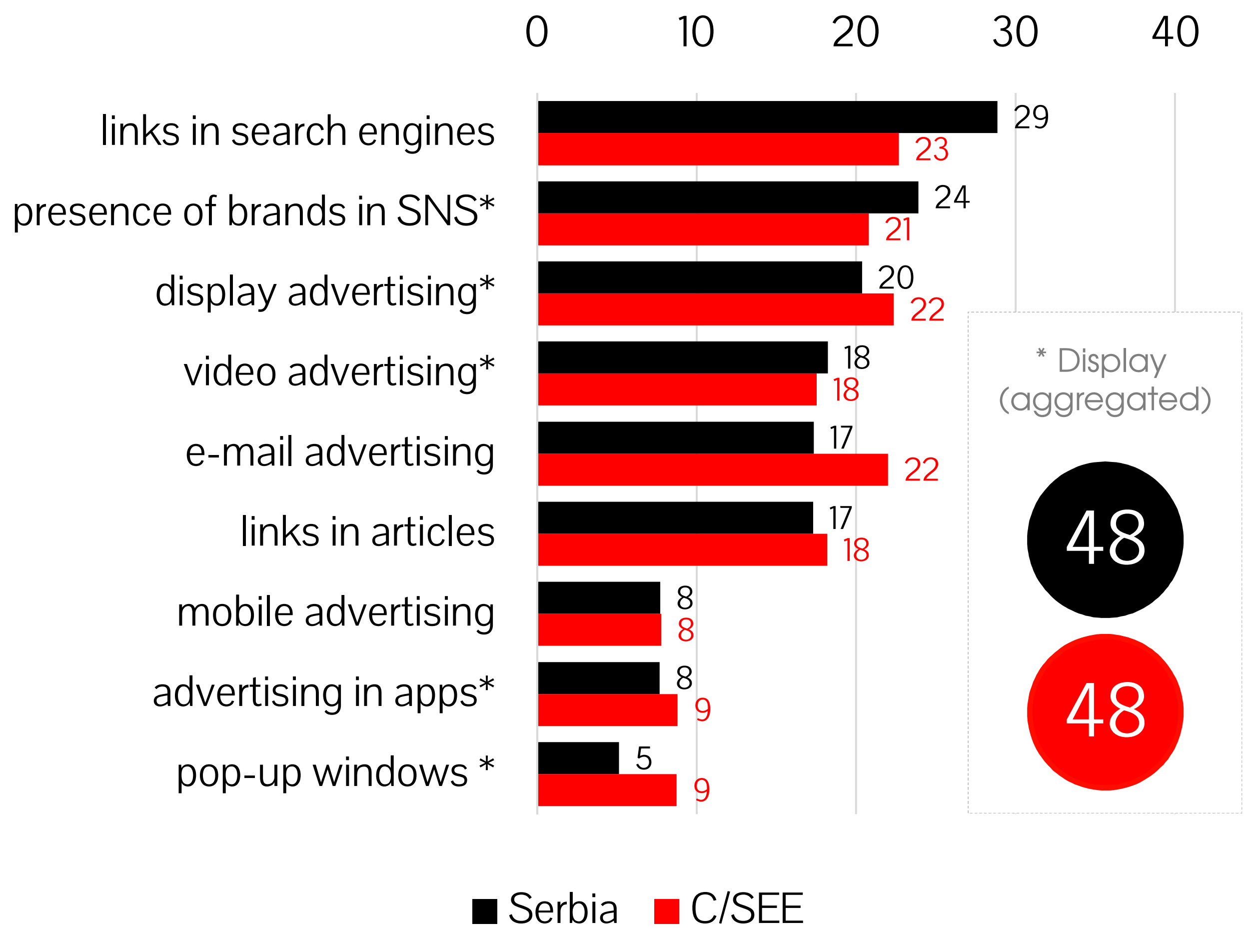


Online advertising triggers

Q:
CJO6. Mark all types of internet advertising you find out about (SELECTED PRODUCT/SERVICE CATEGORY) from.

Filtered: e-consumers

Average % for all categories

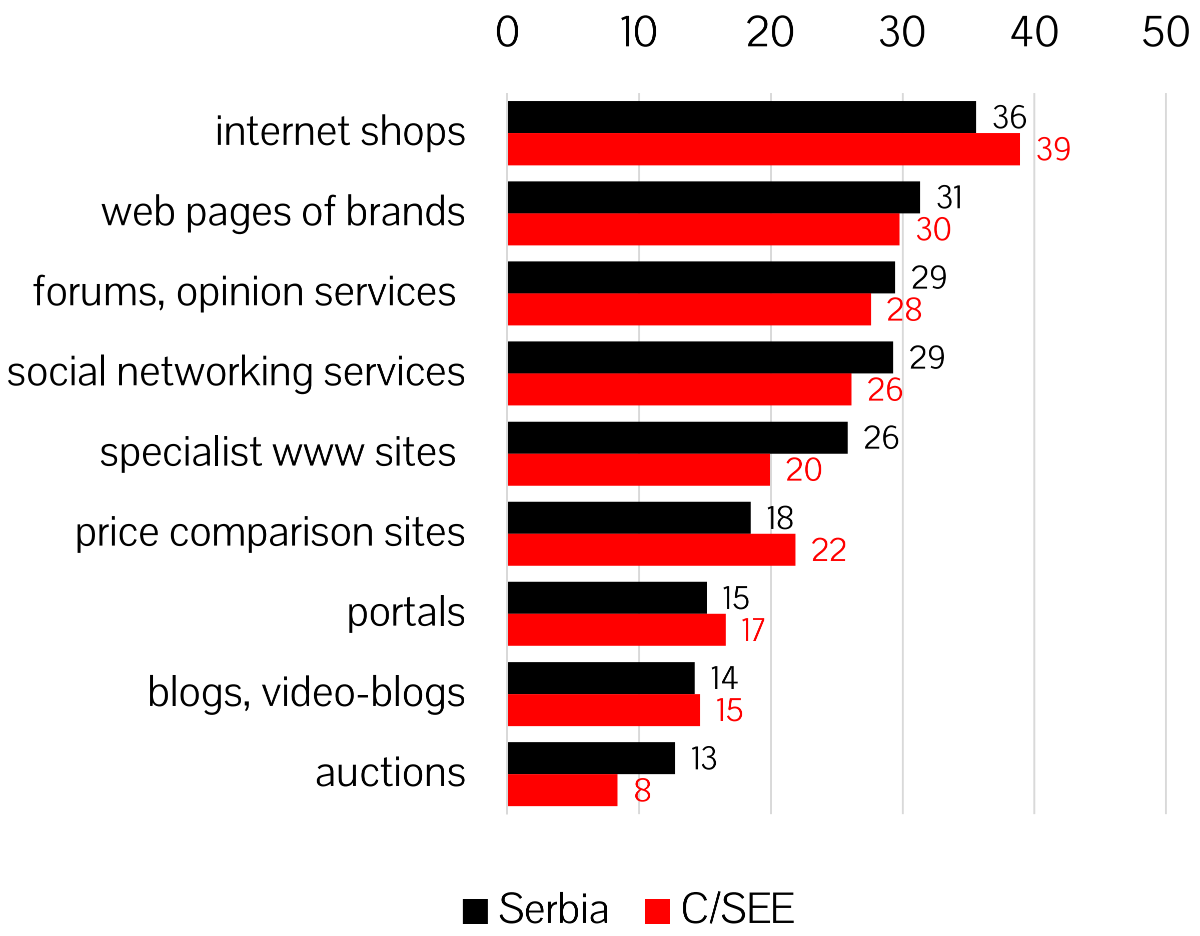


Research online

Q:
CJO5. Mark all internet sources of information you learn about (SELECTED PRODUCT/SERVICE CATEGORY) from.

Filtered: e-consumers

Average % for all categories



Usefulness of the internet in purchase

Q:
CJO7. For the matter of (SELECTED PRODUCT/SERVICE CATEGORY), in your opinion is the internet useful in:

Top 2 boxes = 'definitely yes' + 'rather yes'

Filtered: e-consumers

Average % for all categories

PURCHASE POTENTIAL

Purchase Potential covers two purchase indicators:

- ROPO – purchase made online or offline basing on information found online,
- Purchase Online (e-commerce).

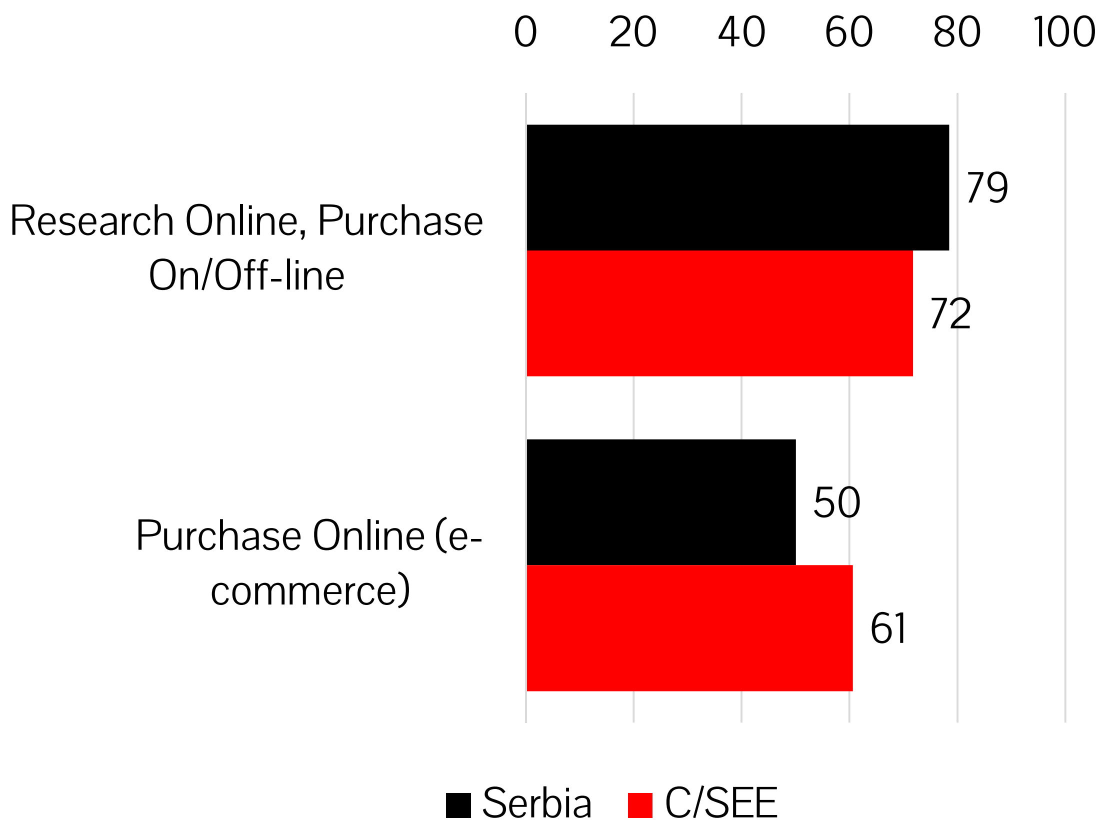
The indicators are based on 'last 6 months' purchase declarations.

Purchase indicators (last 6 months)

Qs:
CJO2. Which of the following products or services did you buy during last six months basing on information found on the internet?

CJO3. Which of the following products or services did you buy during last six months on the internet (payments, purchases, auctions etc.)?

All internet users
%

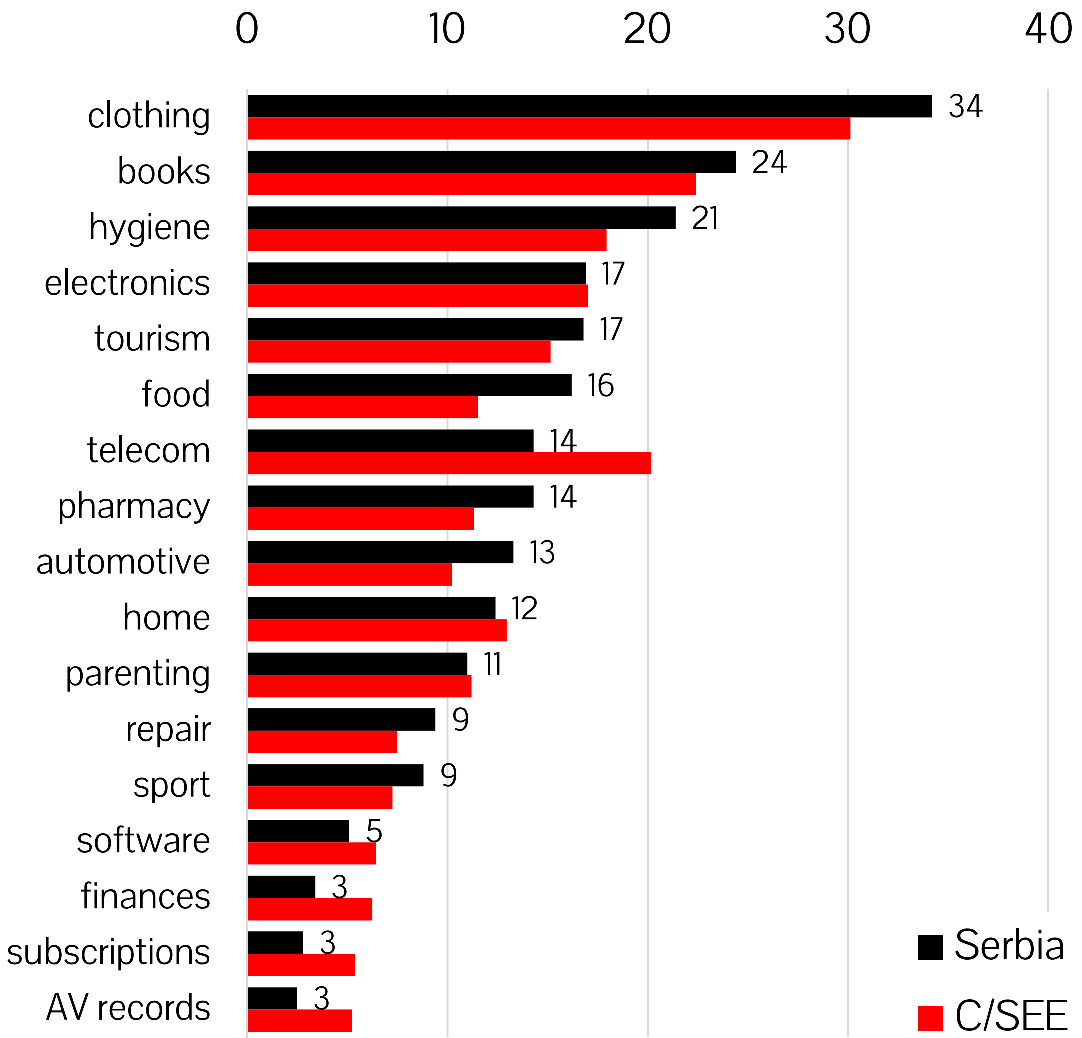


Research Online Purchase On/Off-line

Q:
CJO2. Which of the following products or services did you buy during last six months basing on information found on the internet?

All internet users
%

ROPO = Research Online, Purchase Online or Offline



Purchase online

Q:
CJO3. Which of the following products or services did you buy during last six months on the internet (payments, purchases, auctions etc.)?

All internet users
%