

digitalSCOPE 2014



MEDIA CONSUMPTION in digital society

Country report: Poland

April 2015

Project partners

Leadership



Communication



Local research institutes



Publishers/networks



Executive summary

digitalSCOPE shows that Polish market does not differ much from the researched region. The internet as a medium is one of the most important sources of information, if not the most important, visibly overtaking TV, radio and, in particular, press.

Mobile devices – broadly understood as portable computers, tablets and smartphones – have taken over the leading role in access to the internet. Position of traditional PCs among tools allowing to connect to the internet is decreasing on a regular basis and nowadays it is used by approximately 42%. At the same time smartphones are overtaking portable PCs on the penetration level of approximately 70%.

Polish internet users, like those researched in the region, make extensive use of multiscreening (as many as 85% of them use a few screens simultaneously – TV, smartphone, tablet or PC).

In the purchase process vast majority of web surfers base on information found on the internet – either researching the product online and finalizing purchase offline, or staying online from the beginning of consumer journey till the transaction.

It is worth noting that usage of smartphones in the journey plays a greater role than it is commonly supposed. Although purchase itself is usually made on other devices or offline, what leads to the final purchase is very often current research made on smartphone. It must be also emphasized that the internet is found the most useful source of information and highly reliable medium in the purchase process.

Results of the study covering Polish market show that full use of online potential, lying especially in mobile devices, must be particularly considered by marketers when planning effective product communication.



Robert Wielgo
Board Member
IAB Polska

Participants

Central &
South-Eastern
Europe
(C/SEE)

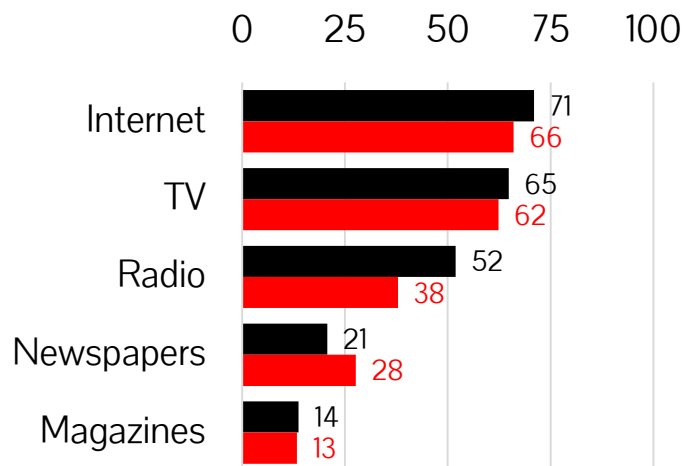
Bulgaria
Macedonia
Poland
Romania
Serbia
Slovakia
Slovenia
Turkey



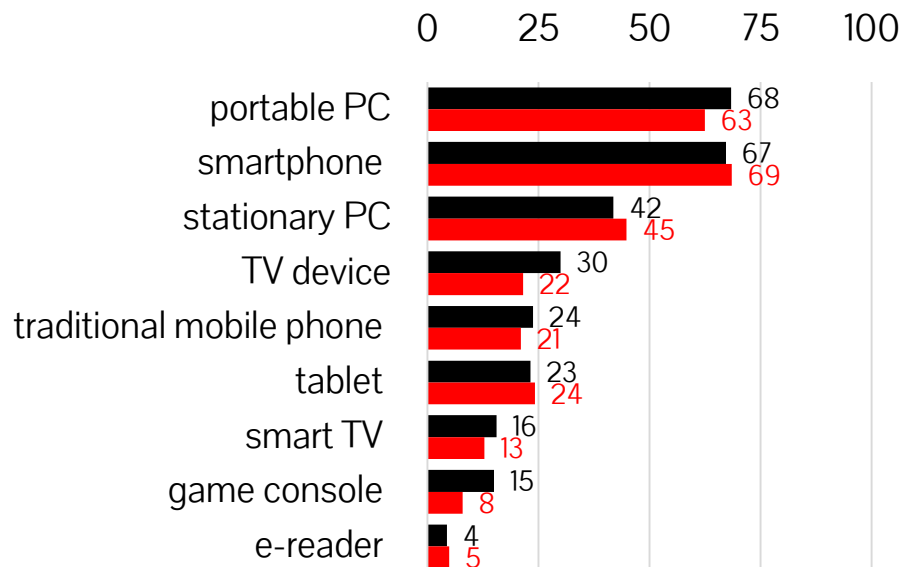
Key results

Poland ■
C/SEE ■

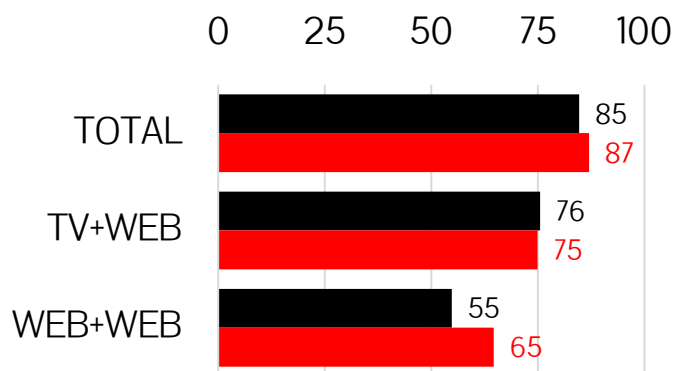
Daily access to media



Access to devices



Multi-screening levels



Purchase (last 6 months)

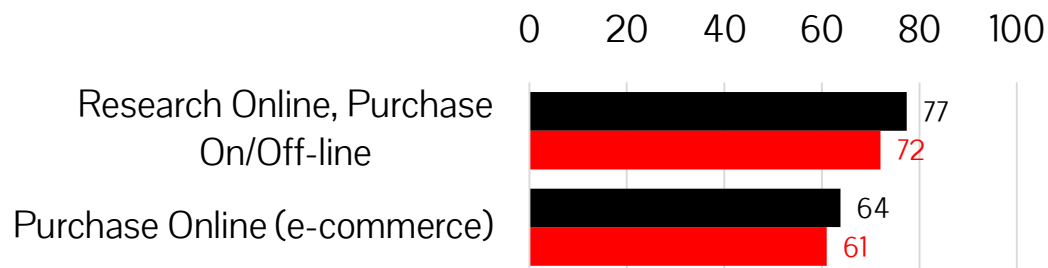


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DETAILED FINDINGS

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Purchase potential

Methodology



Poland

Technique:	CAWI (Computer Assisted Web Interviewing)
Recruitment:	Real Time Sampling, Run On Site: inventory of media partners
Reach in online population 16+:	100% (source: Megapanel PBI/Gemius)
Fieldwork:	29th Sept. – 31st Oct. 2014
Research institute:	OPI/PBI
Researched population:	Above 15 years old
Sample:	N=3 575, representative, weighted
Weighting:	Gender, age and internet usage frequency (basing on Eurostat)

Sample sizes



Poland

MAIN SAMPLE AND SUB-SAMPLES (unweighted)	Poland	C/SEE
All internet users:	3 575	22 108
Device users:		
– smartphone	2 402	16 348
– traditional mobile phone	852	5 500
– stationary PC	1 498	10 891
– portable PC	2 446	15 413
– tablet	828	6 273
– e-reader	157	1 382
– game console	298	1 028
– smartTV	557	3 799
– TV device (decoder, set-tup-box with online connection)	713	2 824
Traditional media users:		
– TV	3 192	20 511
– newspapers	3 095	18 966
– magazines	2 982	18 572
– radio	3 020	18 029

Experts' comments (1/8)

As the digitalSCOPE project demonstrates, Polish web surfers use the internet regularly – every other has an access several times a day, and one in four spends more than 5 hours a day in the web. While in terms of PC and mobile devices usage Poland reflects trends observed in the researched CEE countries, Polish users more frequently use TV devices (e.g. decoder, set-top-box) and game consoles.

The study reveals that each device connected to the network is used for slightly different purposes, directly dependent on the screen size. PCs are used mainly for professional purposes, tablets serve more as the source of entertainment, whereas smartphones provide fast access to information and friends.

The study provides very good overview of the nature of online activities undertaken by Polish users, compared to users from other CEE countries.



Joanna Ciemniowska
Research Specialist



Experts' comments (2/8)

Nowadays consumers are more aware than ever and they are gaining more and more ways to interact with the brand. The internet is the leading source of information on products and services and for internet users it is more credible than magazines, radio or TV.

The key to success is to pay attention to customers' needs and behaviors. The consumer decision journey involves various channels of communication and consequently brands need to diversify the marketing strategy. Knowledge about consumers' behavior patterns is the essential way to understand how to grow a business and improve conversion.



Marta Grodner
Senior Marketing
Manager

Ad!vice

Experts' comments (3/8)

Welcome to the portable digital world! The following report confirms the mobile revolution. In 2014 more individuals had access to portable devices (portable PCs, smartphones) than to traditional, stationary PCs.

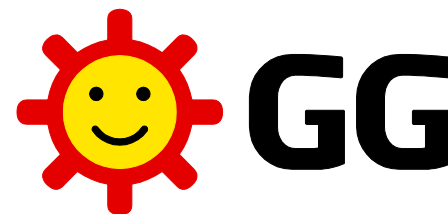
The internet has strengthened its position as the medium used most intensively in terms of days per month and hours spent daily.

The internet also is becoming more and more credible source of information in purchase process: 47% of Polish e-consumers find the internet credible medium compared to only 36% for print, 29% for radio and 25% for TV.

At the moment there is no ground to assume that current increases in accessibility and credibility of the internet and mobile will cease in the nearest future.



Jakub H. Gruszczyński
Market Intelligence
Manager



Experts' comments (4/8)

The year 2015 marks 25 years since the first internet connection in Poland was established. Wirtualna Polska, the very first web portal in Poland, is celebrating its 20th anniversary. In the meantime, the internet has made an impressively huge and rapid transformation from an experiment to a vital means of communication for anyone who made up their mind to use it. It has earned its status as a reliable source of information, trusted more than television.

What's more, the majority of its users stay online even while watching TV. The internet is omnipresent, we have researched using as many as 9 types of devices providing access to it. Portable PC and smartphone are most commonly used devices in Poland. As the internet, being still young, can be carried easily anywhere and at any time, it comes as no surprise that it outshines all other media.



Małgorzata
Kaczmarczyk

Research Manager



grupa wirtualna polska

Experts' comments (5/8)

More mobile, more portable, fighting for engagement and scattered by devices – this is the current picture of the internet as a medium. This transition is real and affects the internet users in an unexpected way.

Dynamically changing ecosystem of online devices does not support all kinds of digital content equally. Mobile devices favor social networks and microblogging platforms. Nowadays for news being 'up-to-date' is more important than being 'in-depth' or 'wise'. There is a plausible explanation of the phenomenon – in the world of immediate information and emotions broadcasted in real-time waiting is a form of asceticism. On the contrary – the 'old' social media (i.e. writing blogs) are closer to stationary PC. It is interesting that purchasing, online banking or checking prices are also more typical for stationary devices. It seems that internet content is evolving from the kingdom of 🧠 to the realm of ❤️. It's a huge challenge for marketers and media consumers. In fact – for the whole human culture.



Jarosław Kowalski
Research Specialist



Experts' comments (6/8)

There is no doubt that Polish media landscape has changed over the last few years. As Polish web surfers experience confirms, the internet is the most engaging medium nowadays, overtaking traditional media. Almost 3/4 of Polish digital audience was online at least once per day whereas traditional TV was watched daily by 2/3 of internet users.

By definition, the range of online activities is wider than those offered by other media. On one hand, e-mail communication and news consumption are still very frequent and important online activities but on the other hand we can observe increasing role of the internet in purchase process (as the most popular source of information on product and price, more credible than traditional media) as well as online entertainment expansion (i.e. rapidly growing online video audience). As the internet evolution is still in progress, the process is likely to generate more changes in online services landscape.



Agnieszka Ogrocka
Research Manager

onet.

Experts' comments (7/8)

Results of the survey show that display ad is still the most effective channel on Polish online advertisement market. For example: 32% of Polish consumers gather information about the product or category from the graphic advertisement on website.

Due to new high-technology retargeting tools, which enable to combine ad space with hard and detailed data about consumers, display ads can reach KPI level similar to best performance marketing campaigns. It means that display is now the best instrument to build brand awareness, as well as effectively support sales targets.



Adam Siedlecki
Sales Director

GOLDBACH
AUDIENCE

Experts' comments (8/8)

Range of devices used to access media is bigger than it may commonly seem. Not only PCs, smartphones and tablets, but also smart TVs, gaming consoles and e-book readers are used to access web and apps.

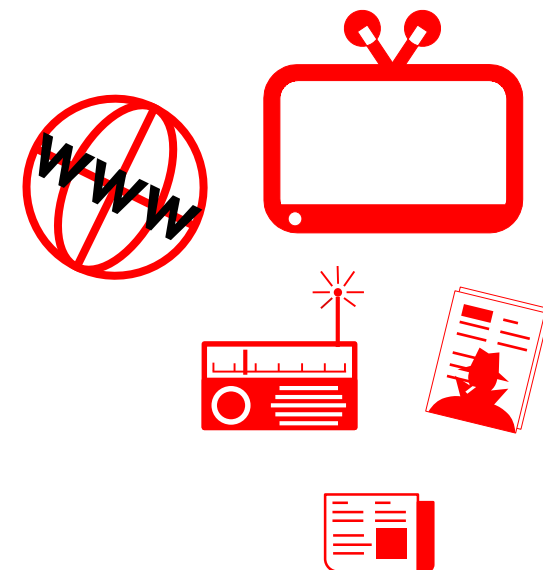
Delivering content and services to all types of screens becomes big challenge for publishers. It is definitely noteworthy that smartphones are the most popular device category used to access the web several times a day (53%, while portable PCs – 50%). This is the major shift in internet users behavior. Easiness of access to the information and communication services is natural for mobile internet users. This is reflected in the rank of the most popular activities performed on smartphones: searching the web, using maps, social networks and e-mail.



Maciek Wiktorowski
Director of Portal
Product
Development

interia

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

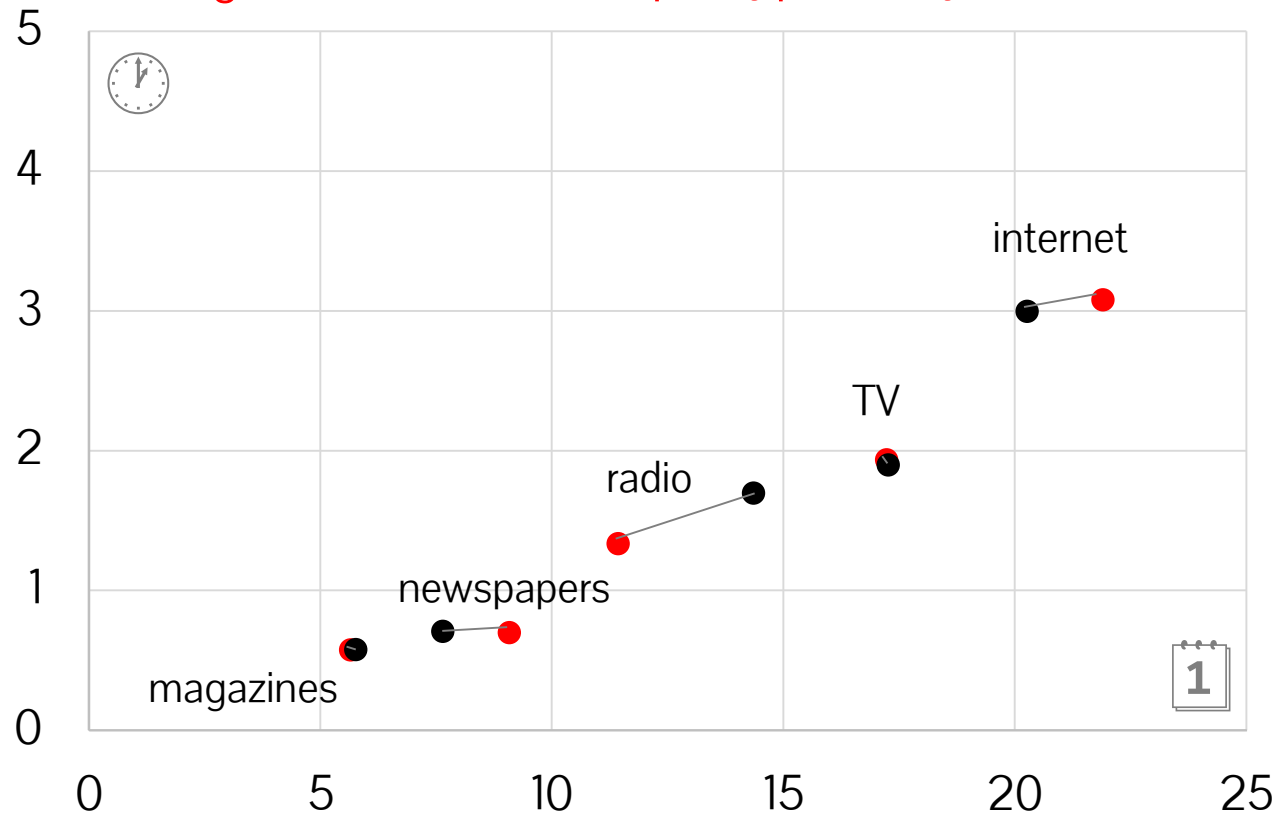


Poland

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

All internet users
%

(Y) Average number of hours per typical day



(X) Average number of days per month

● Poland ● C/SEE

Access to media – frequency



Poland

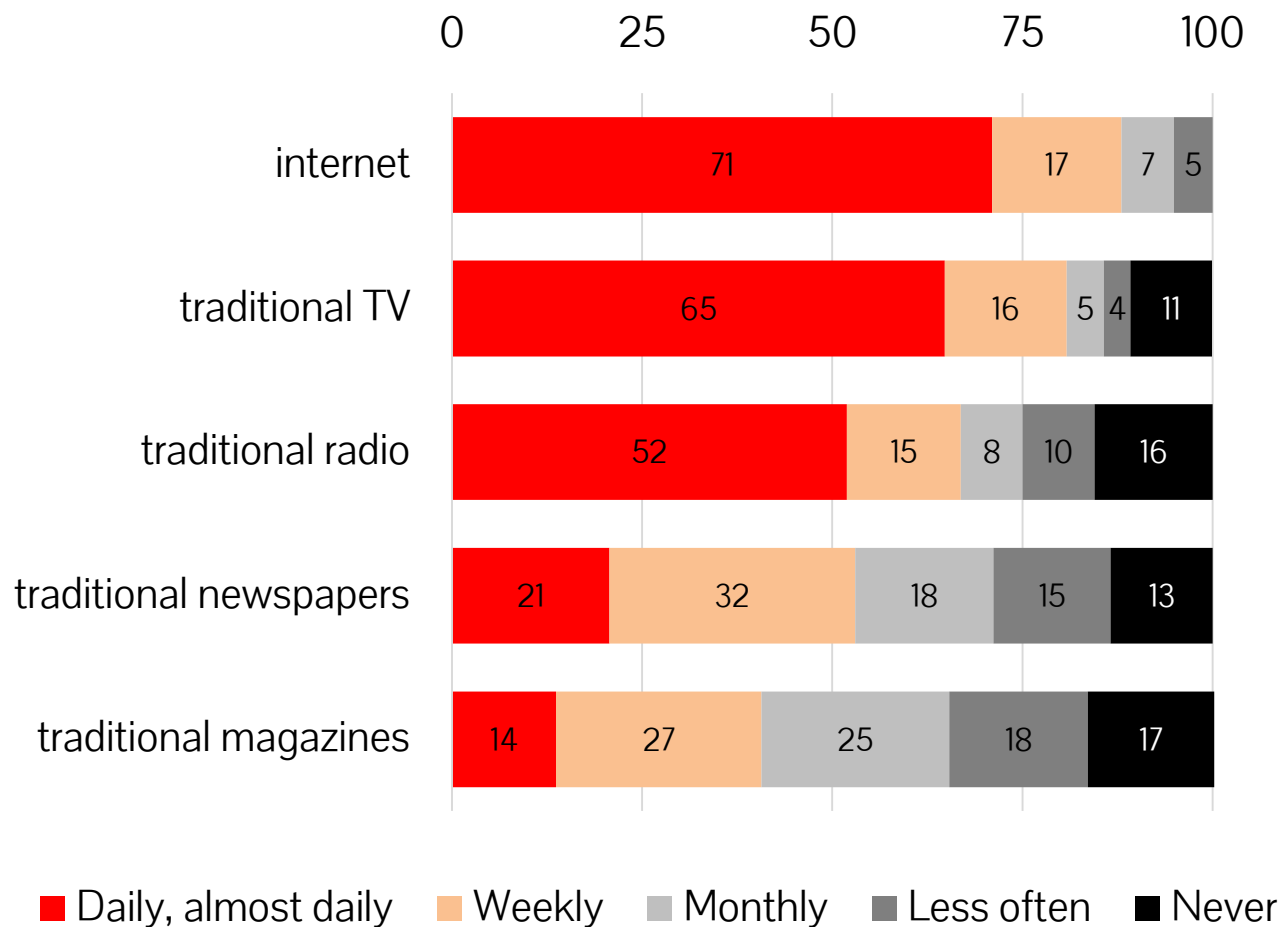
Qs:

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



Access to media – frequency



Poland

Qs:

M3. How often do you use the internet? (*Weighted according to Eurostat data*)

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

All internet users

%



internet

traditional
TVtraditional
radiotraditional
newspaperstraditional
magazines

	internet	traditional TV	traditional radio	traditional newspapers	traditional magazines
A few times a day	46	32	27	7	6
Daily or almost daily	25	33	25	14	8
A few times a week	14	13	12	18	13
Once a week	3	3	3	15	14
A few times a month	5	3	5	12	14
Once a month	2	2	3	7	11
Less often	5	3	10	15	18
Hard to say	0	0	0	1	1
Never	-	11	16	13	17

Daily access to media

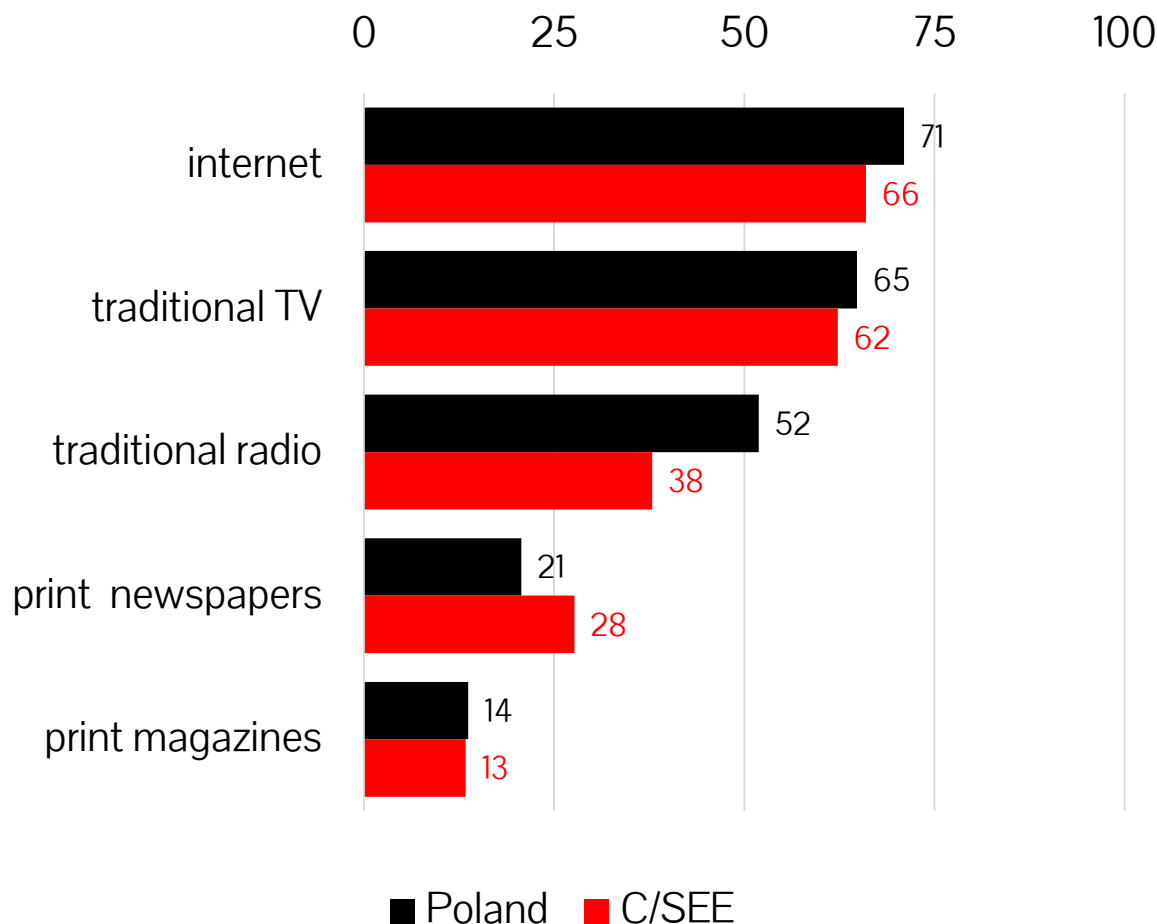
Qs:

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



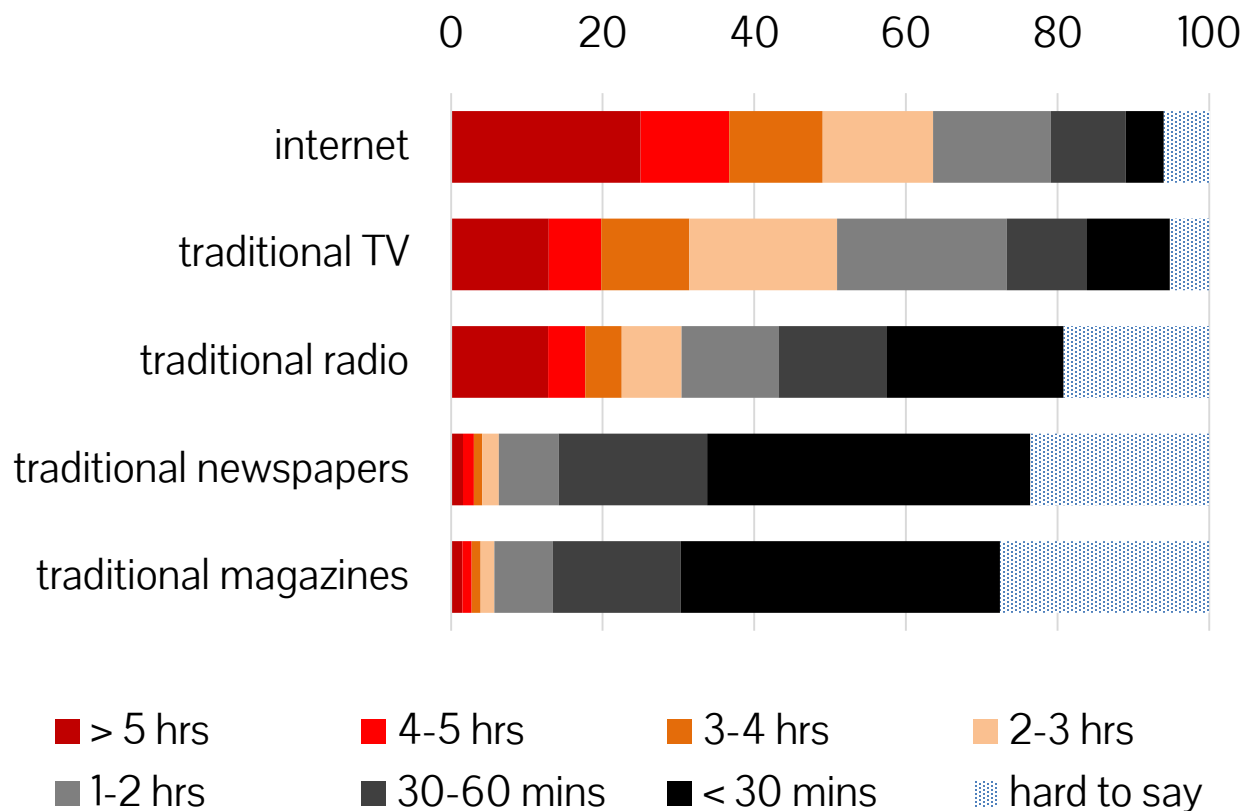
Poland

Qs:

Q1. On an average day that you use the internet, how much time do you spend online?

Q3. 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')
%



Daily time spent per media



Poland

Qs: Q1. On an average day that you use the internet, how much time do you spend online?

Q3. 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')

%



internet



traditional
TV



traditional
radio



traditional
newspapers



traditional
magazines

	internet	traditional TV	traditional radio	traditional newspapers	traditional magazines
More than 5 hours	25	13	13	2	2
4-5 Hours	12	7	5	1	1
3-4 Hours	12	12	5	1	1
2-3 Hours	15	20	8	2	2
1-2 Hours	16	22	13	8	8
30 minutes-1 Hour	10	11	14	20	17
Less than 30 minutes	5	11	23	43	42
Hard to say	6	5	19	24	28

Time slots online



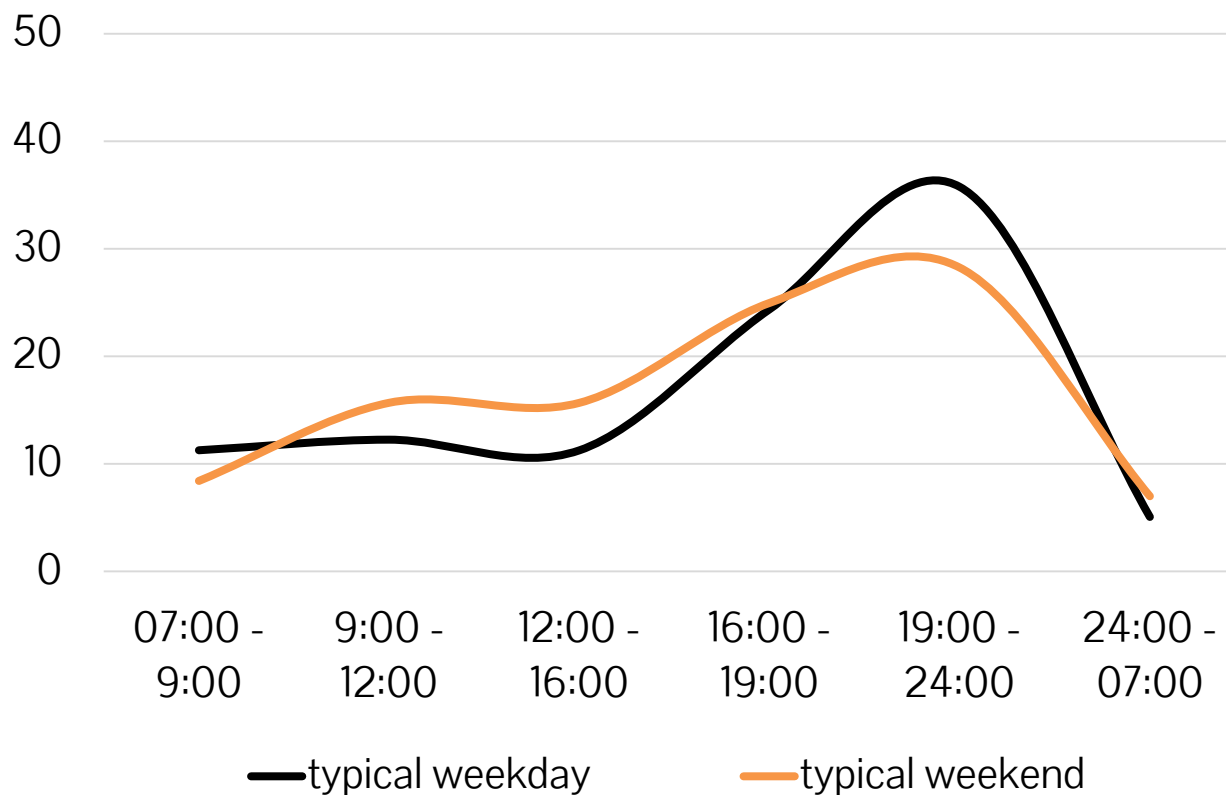
Poland

Q:

Q2. In which time slots do you mostly access the internet on the typical weekday/ weekend?

Multi-response question, recalculated to 100%

Filtered: internet users accessing the internet on weekdays/weekends %



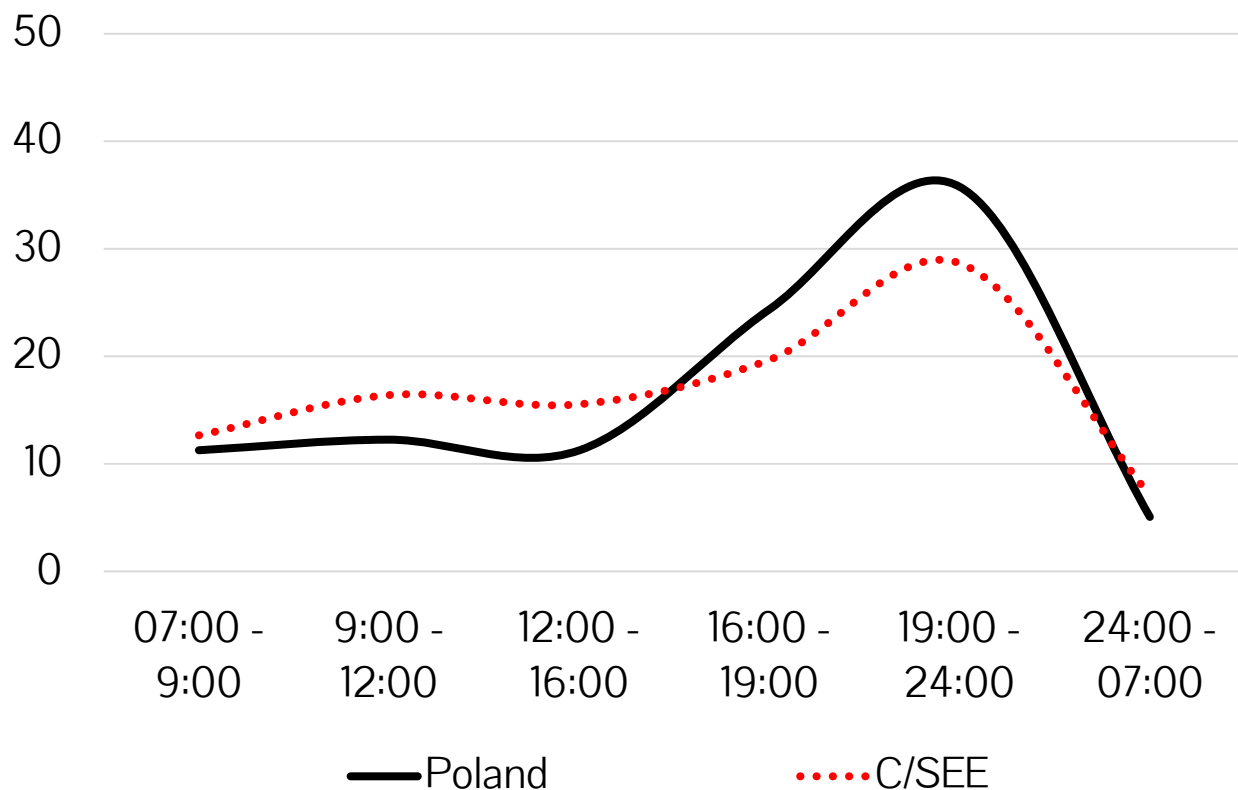
Time slots online: typical weekday

Q:

Q2. In which time slots do you mostly access the internet on the typical weekday?

Multi-response question, recalculated to 100%

Filtered: internet users accessing the internet on weekdays
%



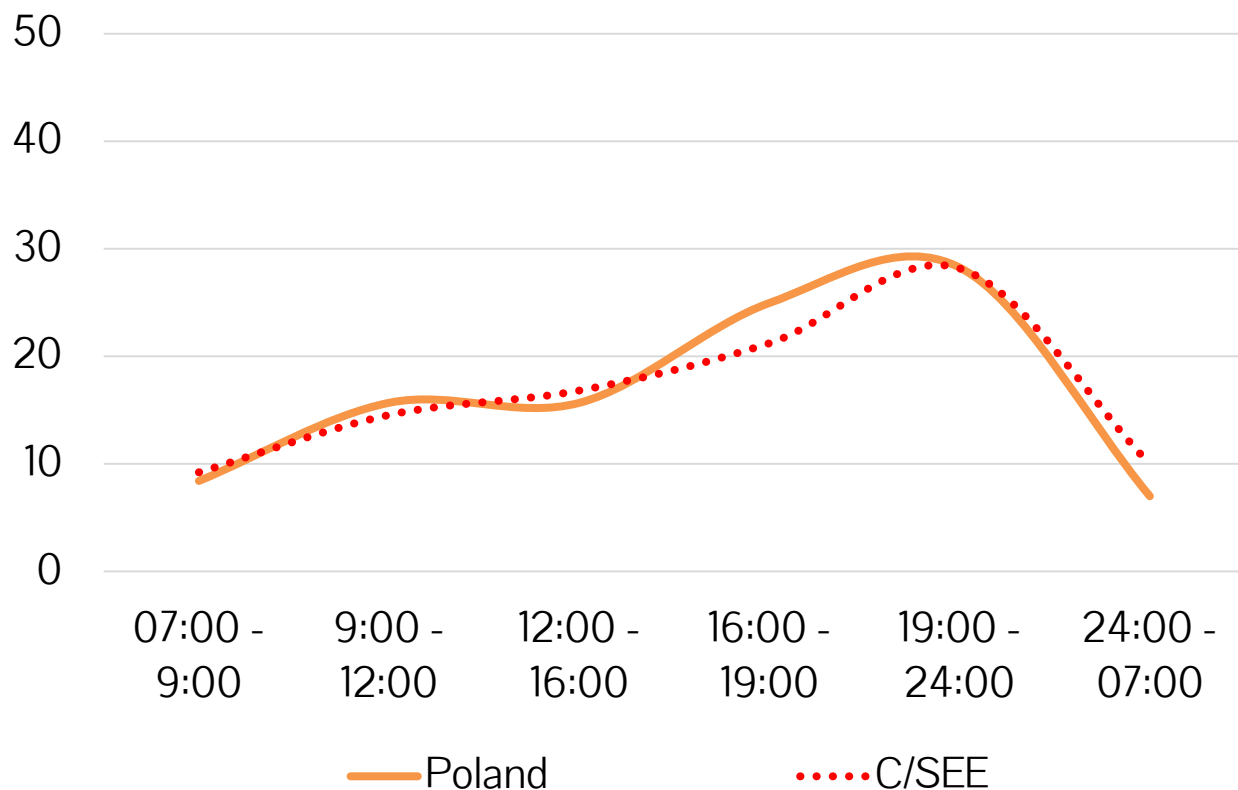
Time slots online: typical weekend

Q:

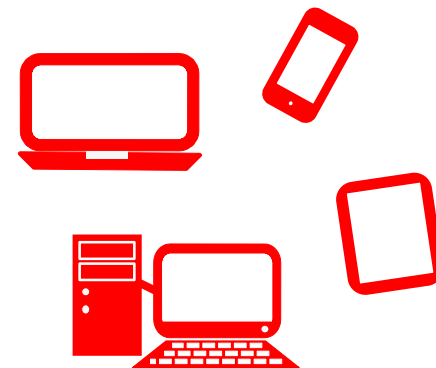
Q2. In which time slots do you mostly access the internet on the typical weekend?

Multi-response question, recalculated to 100%

Filtered: internet users accessing the internet on weekends
%



ONLINE DEVICES



'Smartphone' includes declarations prompted with the following features:

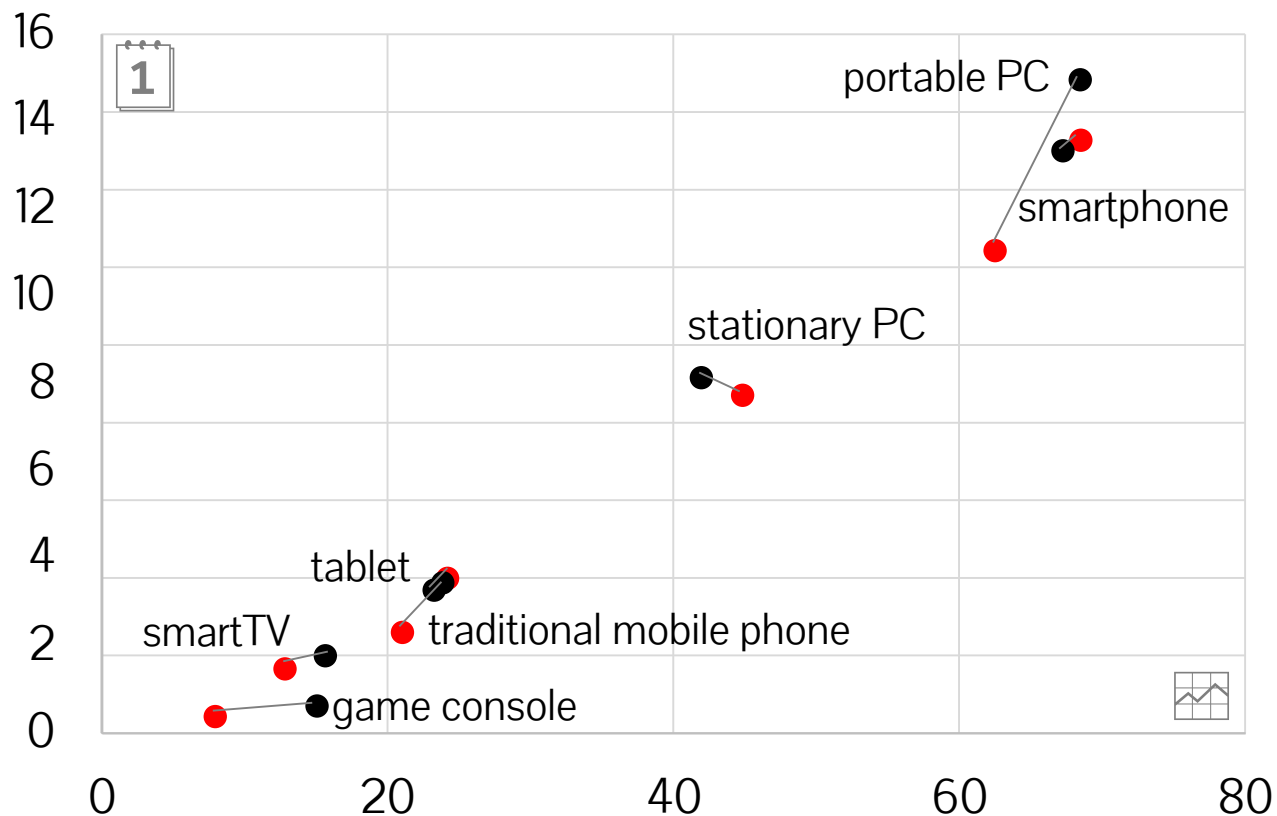
- tactile screen or qwerty keyboard,
- ability to use:
 - internet,
 - navigation,
 - applications,
 - social networking services.

E-media usage – summary

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

All internet users
%

(Y) Average number of days per month spent online



(X) Penetration of devices

● Poland ● C/SEE

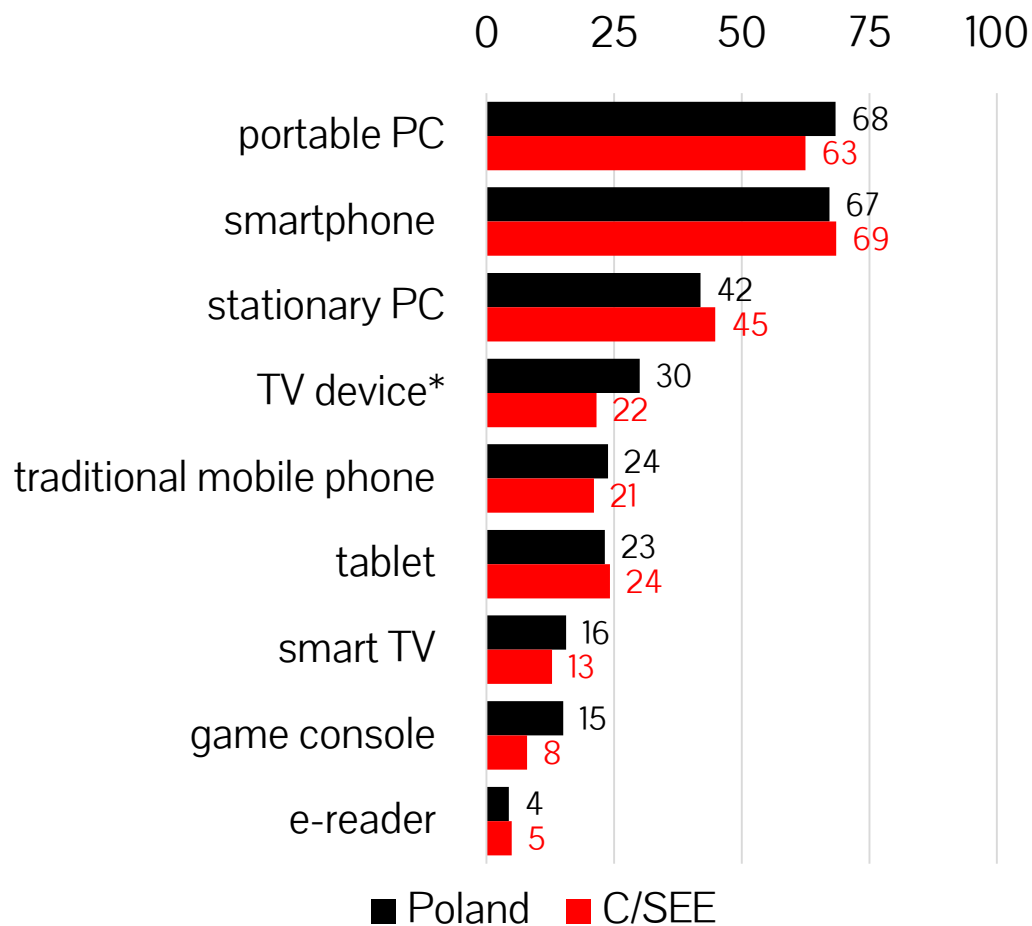
Access to devices

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

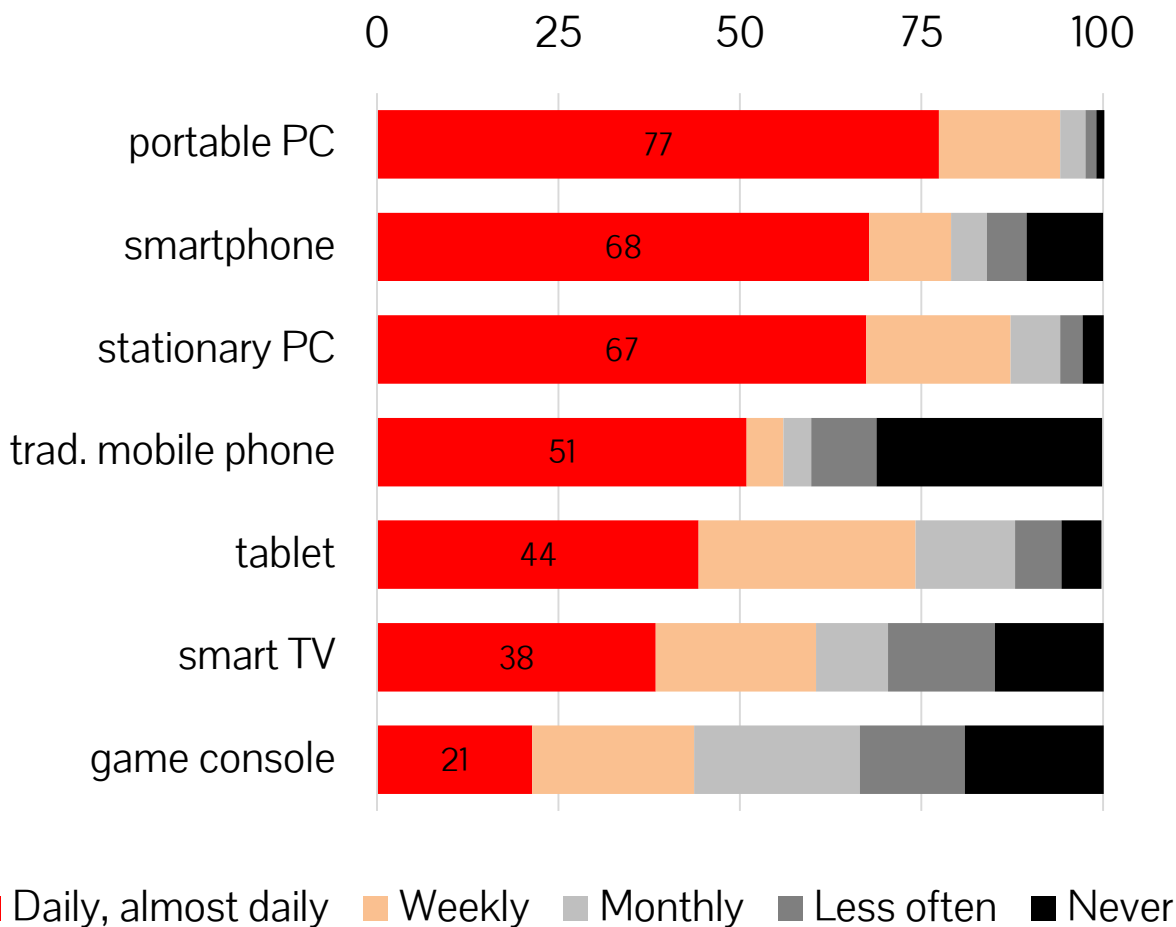


Poland

Q:

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

Filtered: device users
%



Access to internet – frequency



Poland

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

Filtered: device users

%



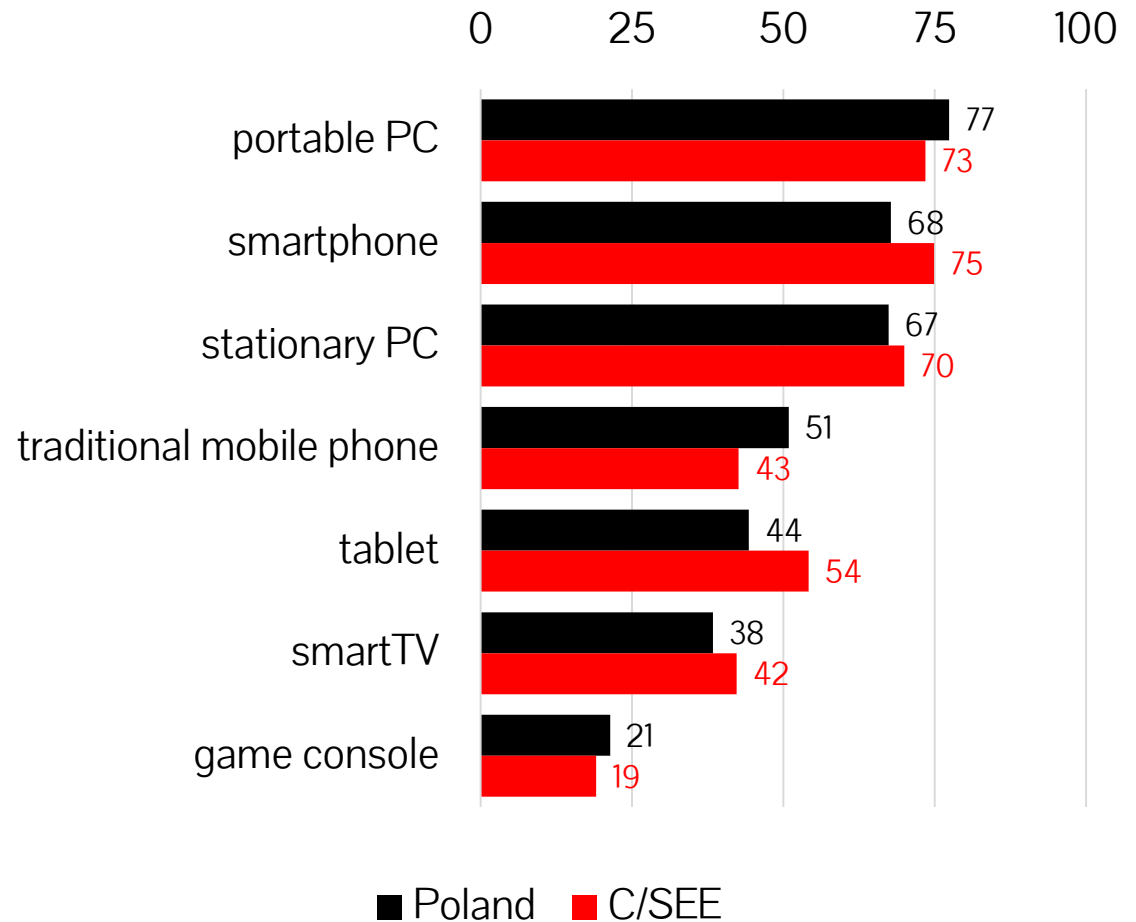
	stationary PC	portable PC	trad. mob. phone	smartphone	tablet	smart TV	game console
A few times a day	42	50	38	53	25	19	11
Daily or almost daily	26	27	13	15	20	20	11
A few times a week	17	14	4	9	22	15	15
Once a week	3	2	1	2	8	7	8
A few times a month	4	2	2	3	10	7	15
Once a month	3	1	2	2	4	3	8
Less often	3	1	7	5	6	14	15
Hard to say	0	0	2	0	0	1	0
Never	3	1	31	11	6	15	19

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

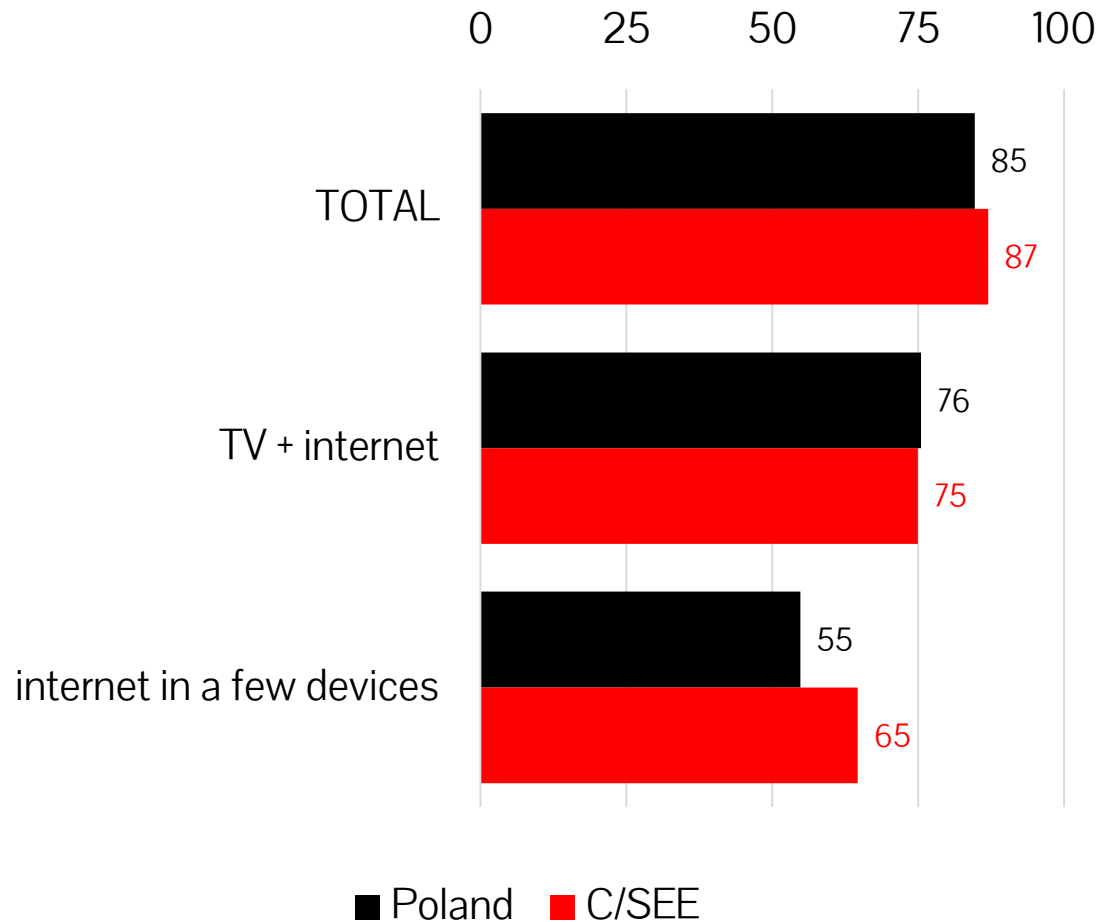
Qs:

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 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
%



Multi-screening by devices



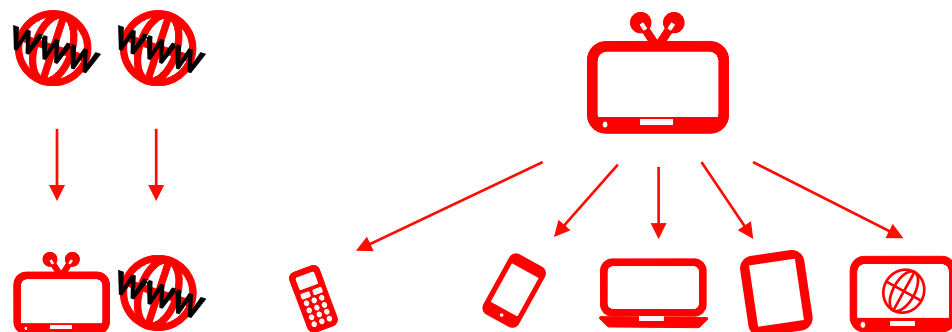
Poland

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 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?



	MS1.	MS2.	MS3: traditional mobile phone	MS3: smartphone	MS3: PC (any)	MS3: tablet	MS3: smart TV
A few times a day	19	13	12	20	19	14	9
Daily or almost daily	23	12	9	16	21	15	11
A few times a week	17	10	4	12	12	15	7
Once a week	4	4	0	3	3	6	3
A few times a month	5	4	2	6	5	7	4
Once a month	2	1	1	3	3	3	2
Less often	9	11	8	9	7	14	15
Hard to say	0	0	0	0	0	0	0
Never	22	45	63	31	30	26	48

Filtered: MS1, MS3: TV/device users; MS2: all internet users
%

Activities online when watching TV

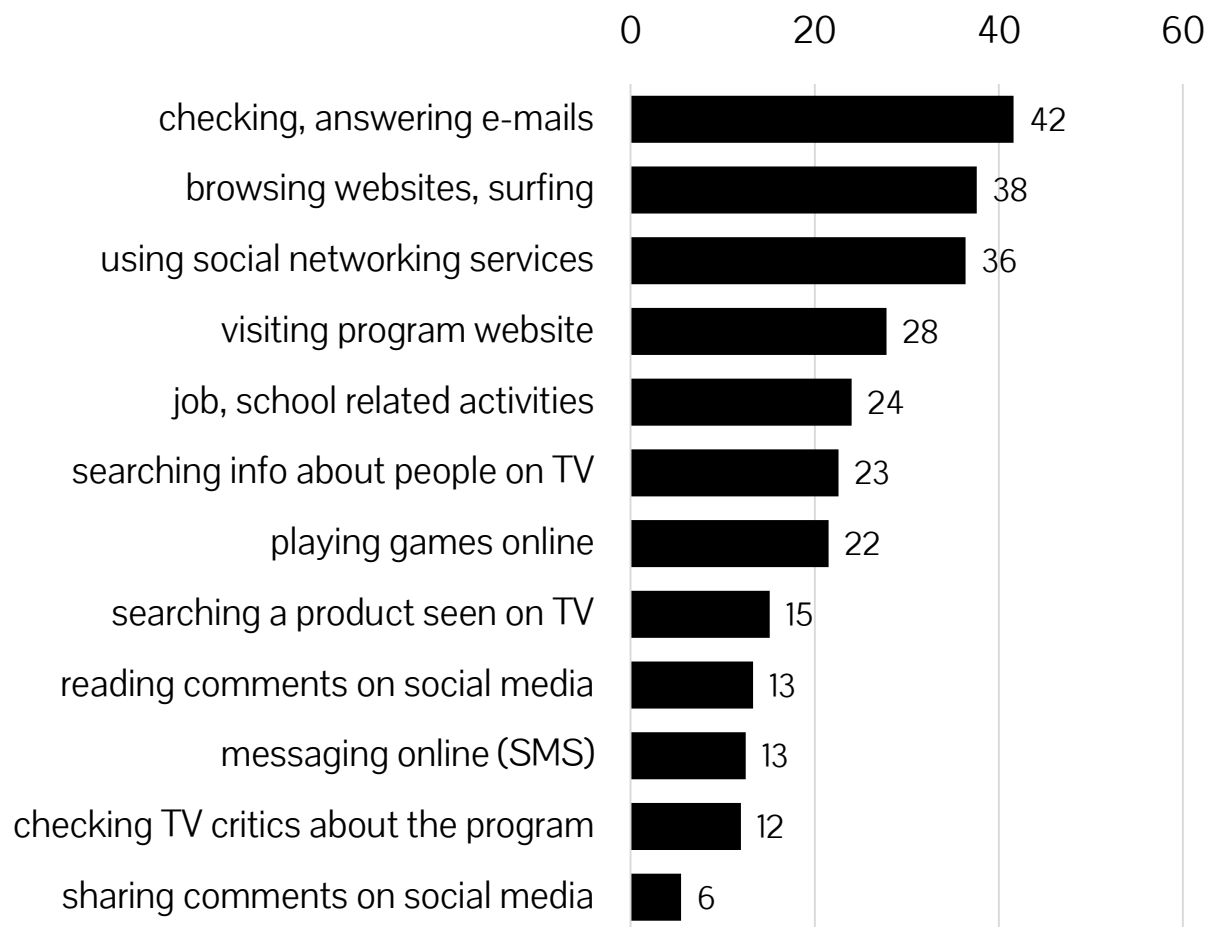


Poland

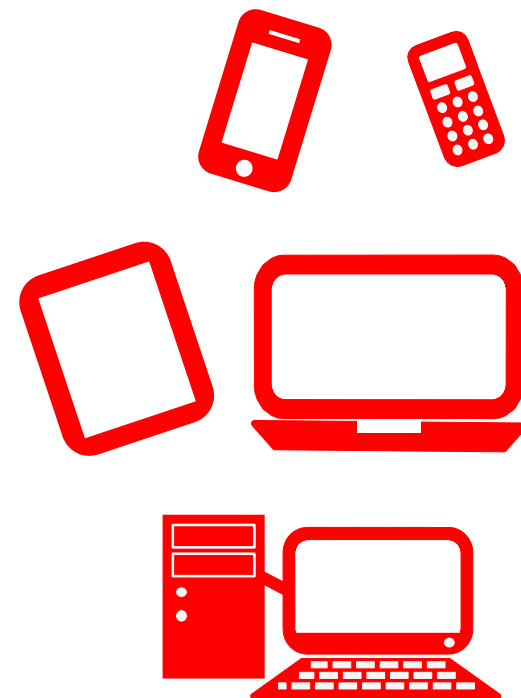
Q:

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



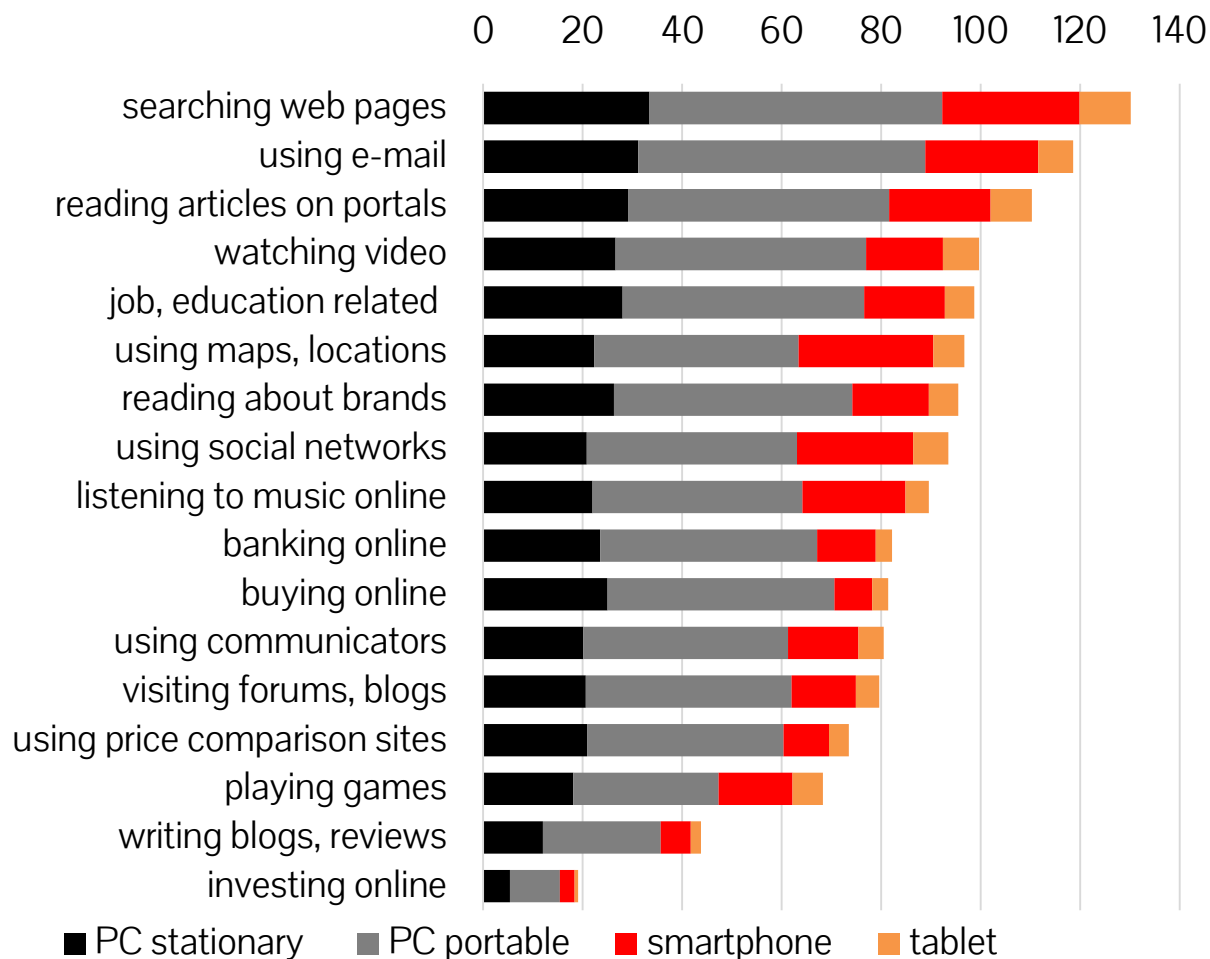
Poland

Q:

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

All internet users

Cumulative %



Typical activities – stationary PC

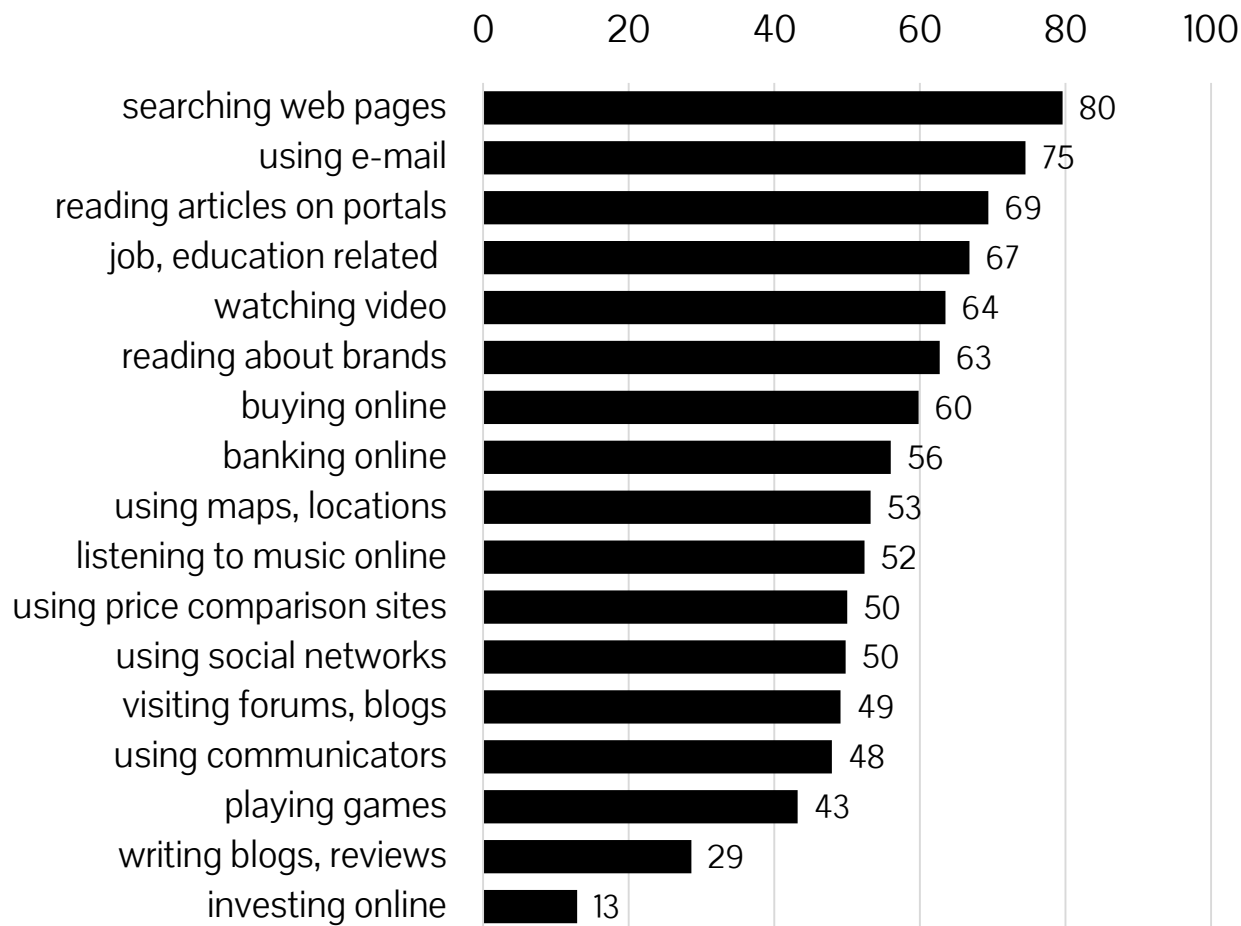


Poland

Q:

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

Filtered: stationary PC users
%



Typical activities – portable PC

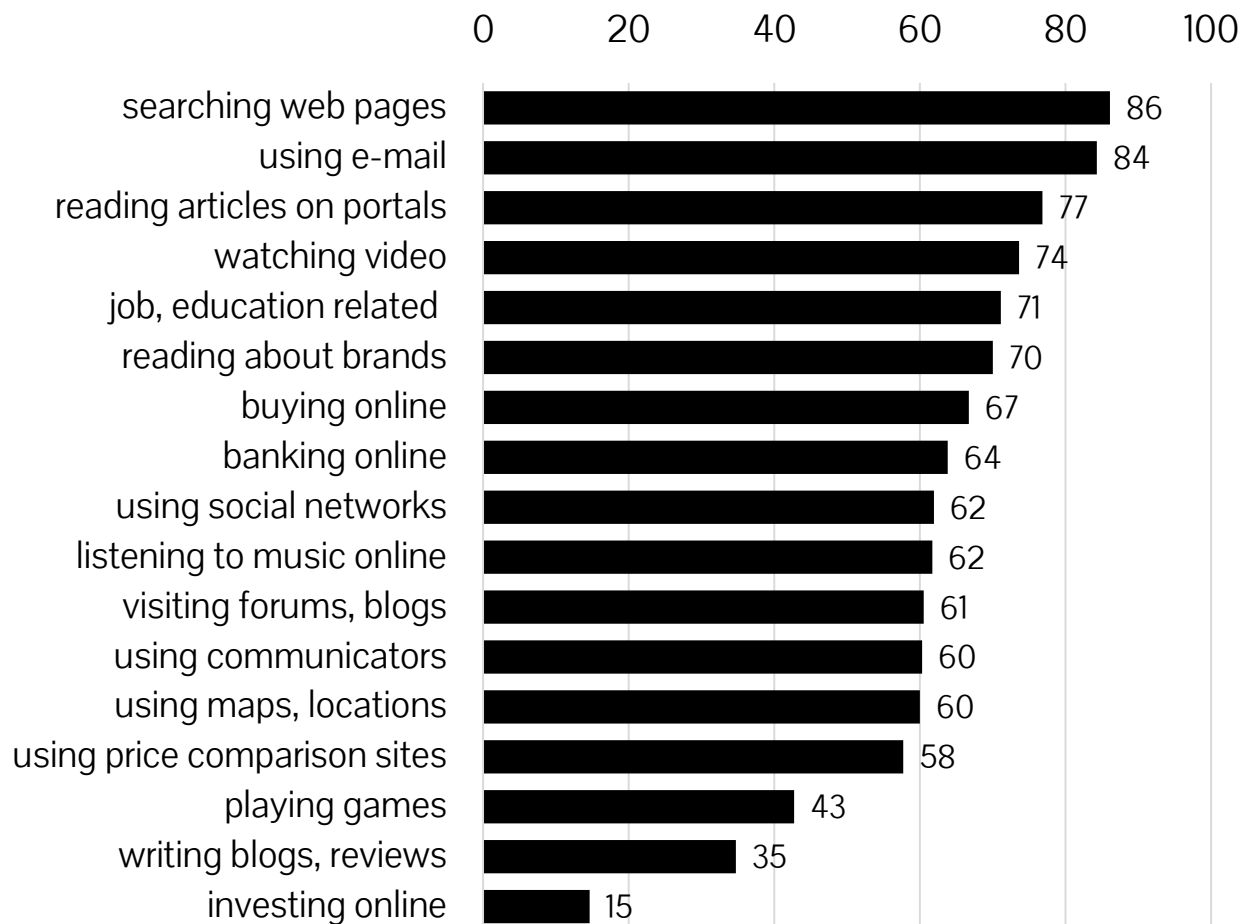


Poland

Q:

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

Filtered: portable PC users
%



Typical activities – smartphone

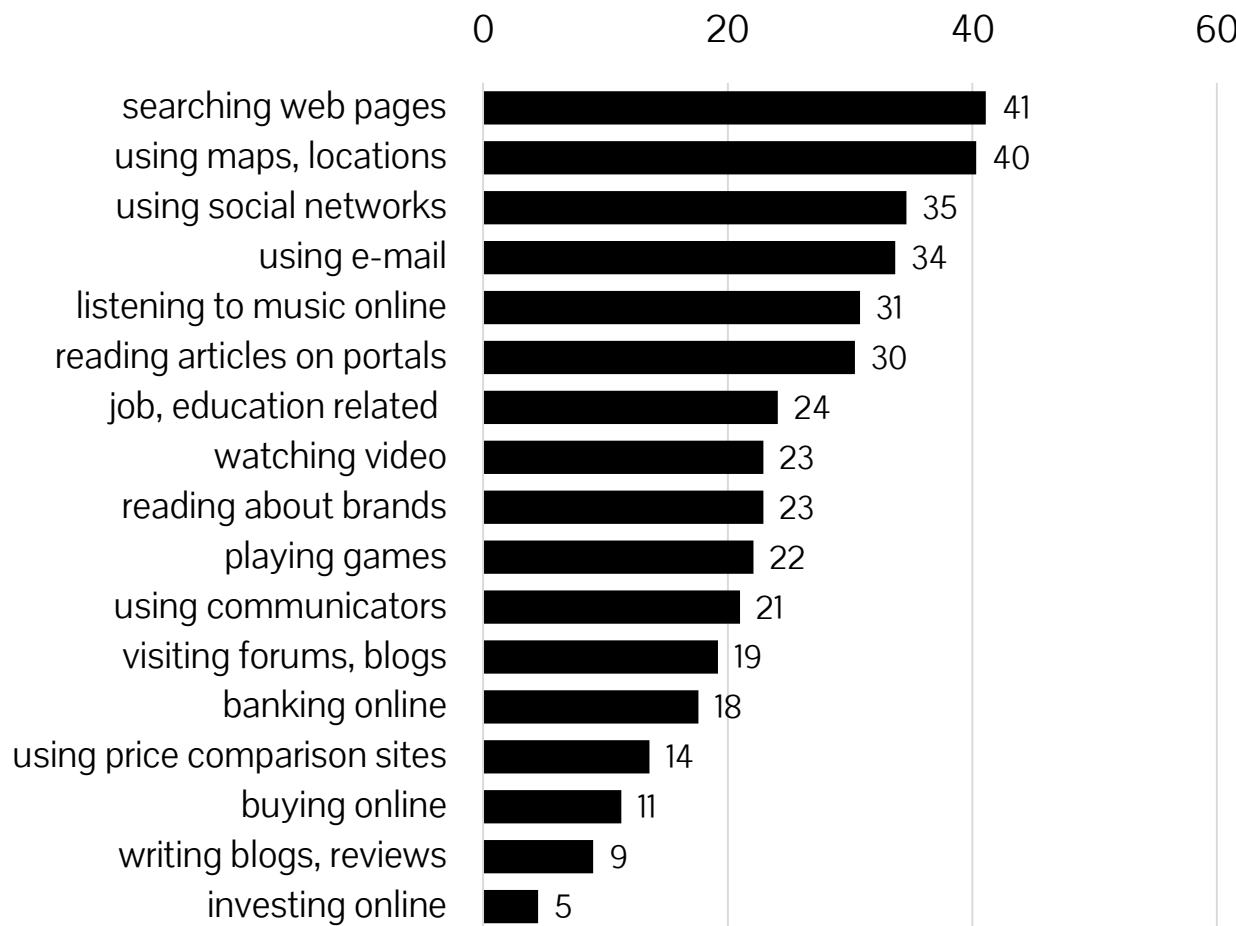


Poland

Q:

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

Filtered: smartphone users
%



Typical activities – tablet

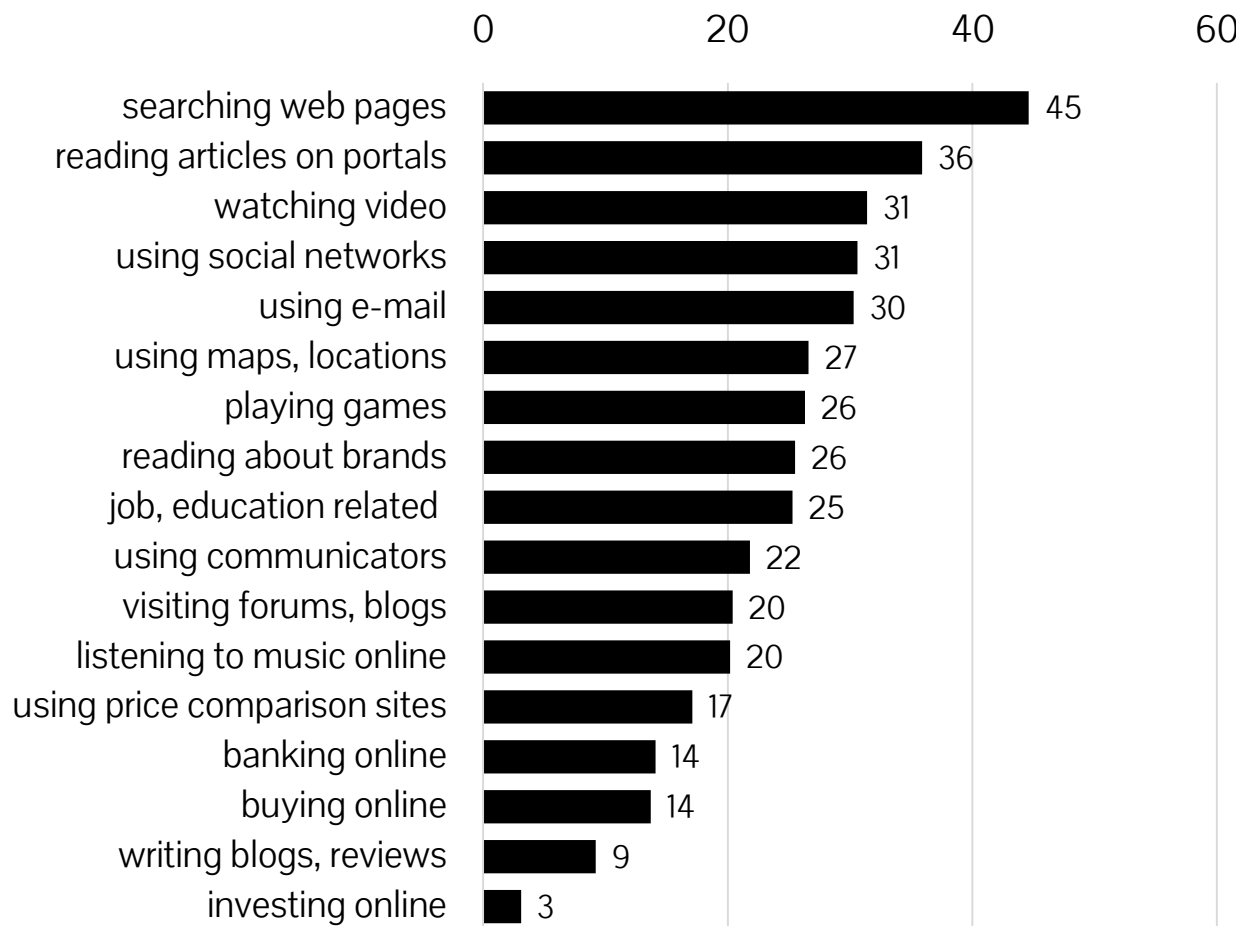


Poland

Q:

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

Filtered: tablet users
%



Typical activities online – summary

Communication

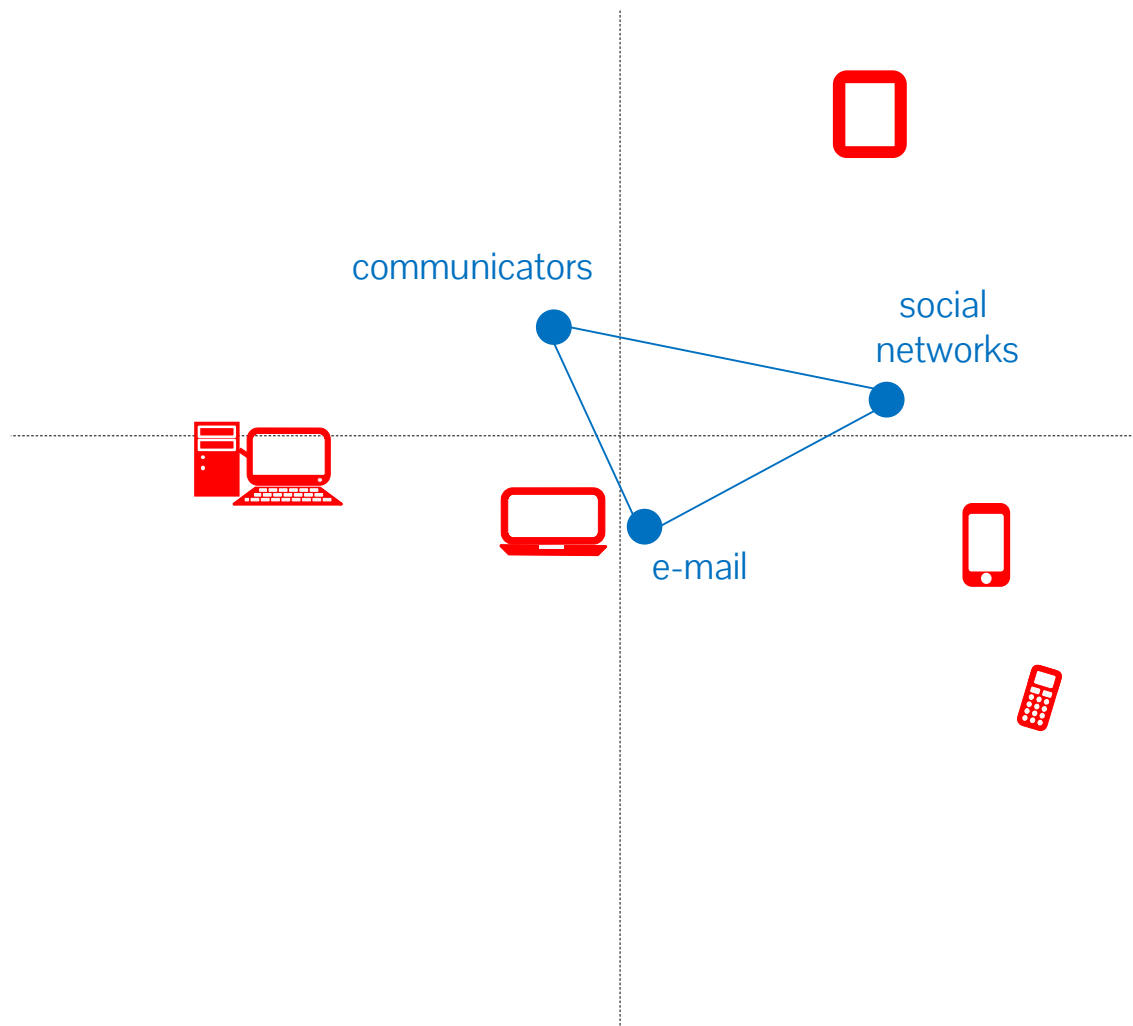
Q:

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

Filtered: devices users

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.



Poland

Typical activities online – summary

Entertainment

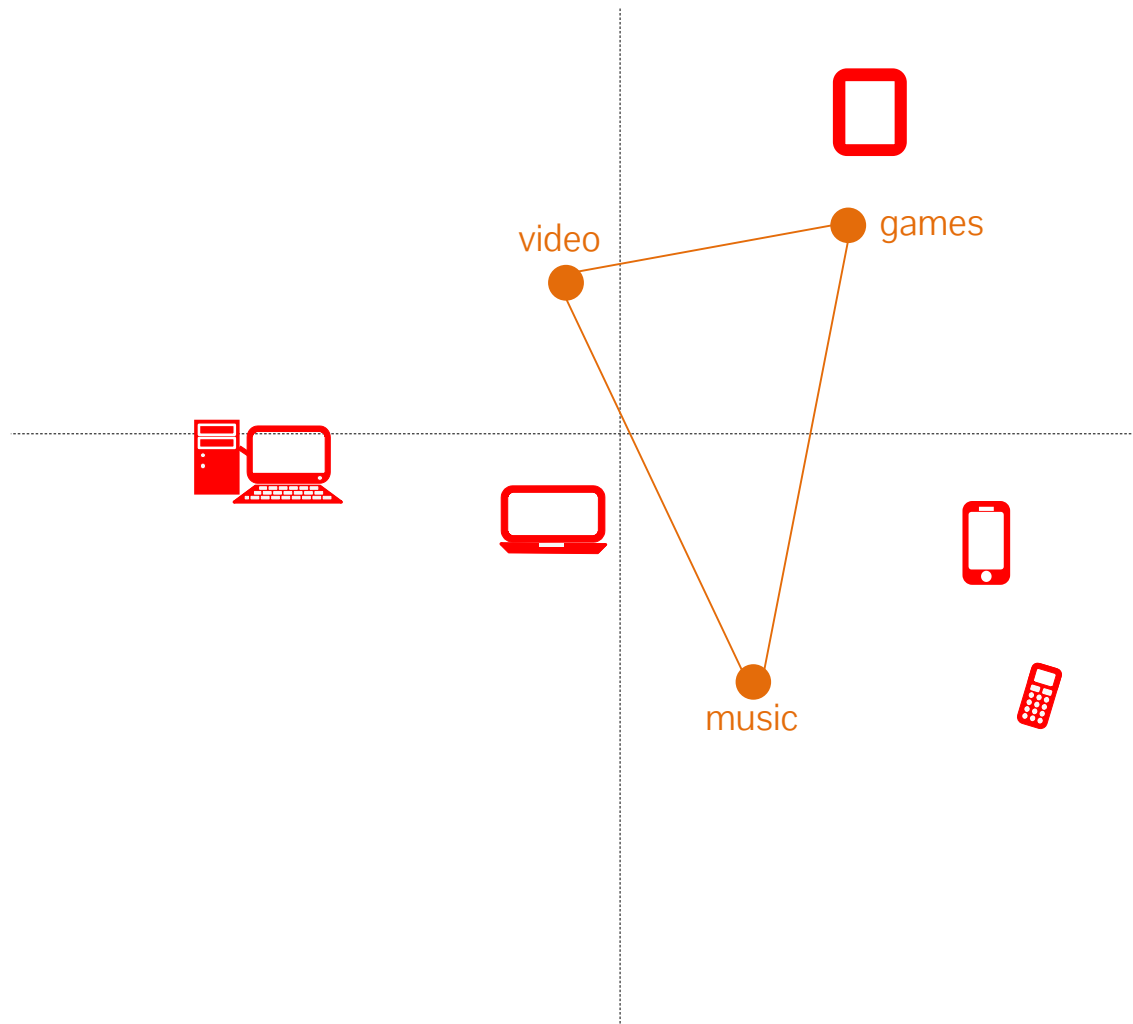
Q:

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

Filtered: devices users

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.



Poland

Typical activities online – summary

Information

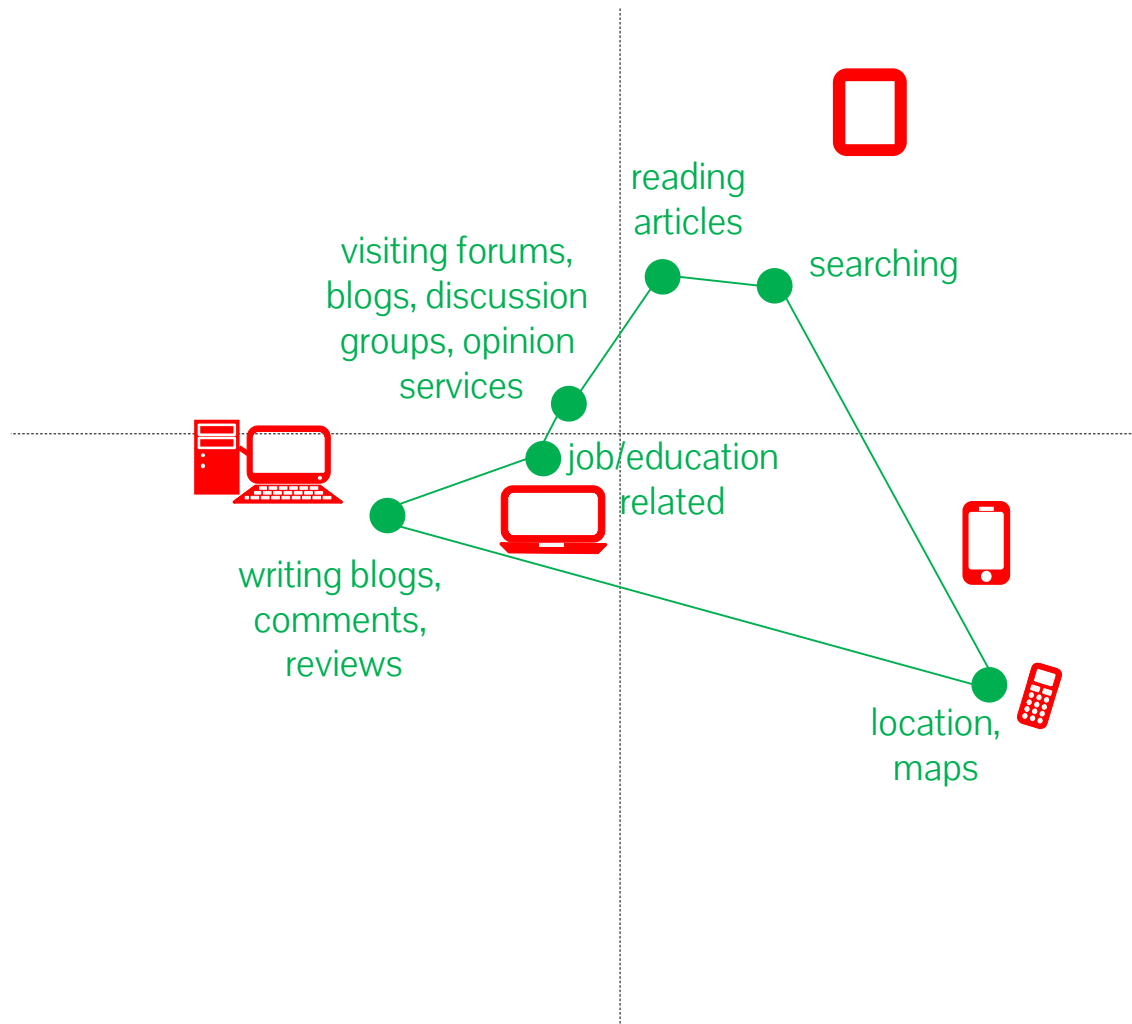
Q:

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

Filtered: devices users

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.



Poland

Typical activities online – summary

Purchase process, finances

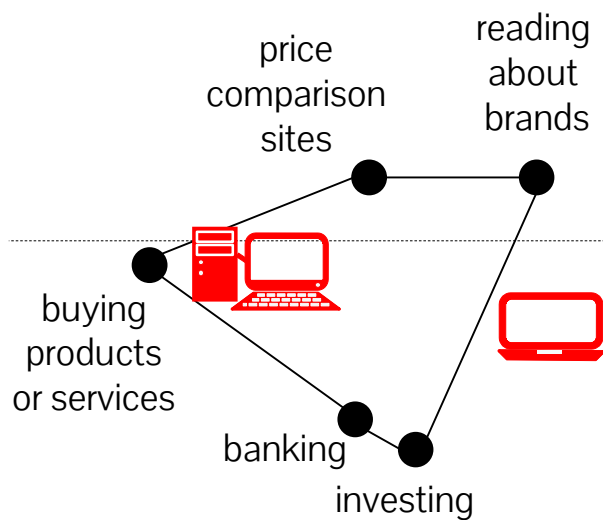
Q:

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

Filtered: devices users

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.



Poland

Typical activities online – summary



Poland

Q:

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

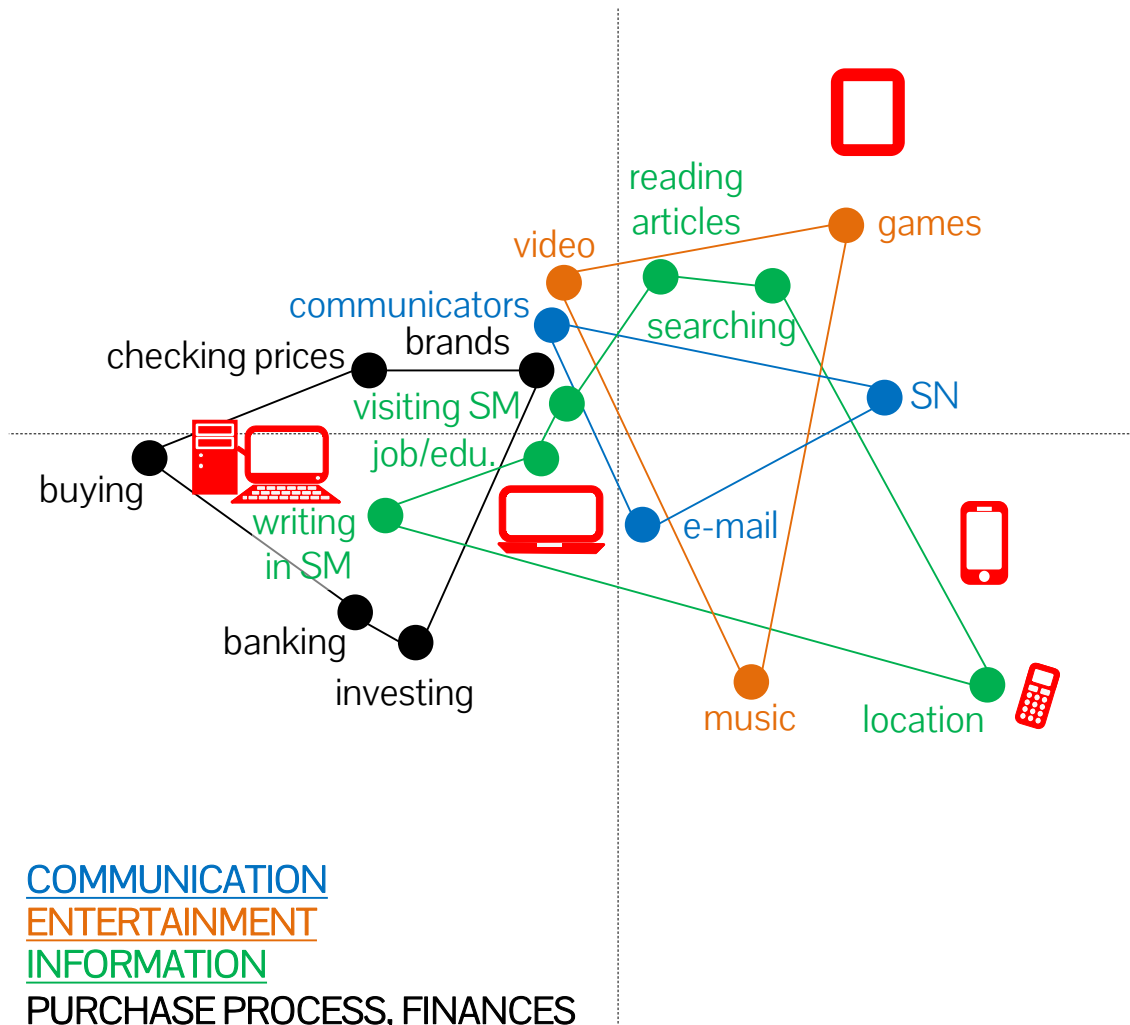
Filtered: devices users

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



Poland

Qs:

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

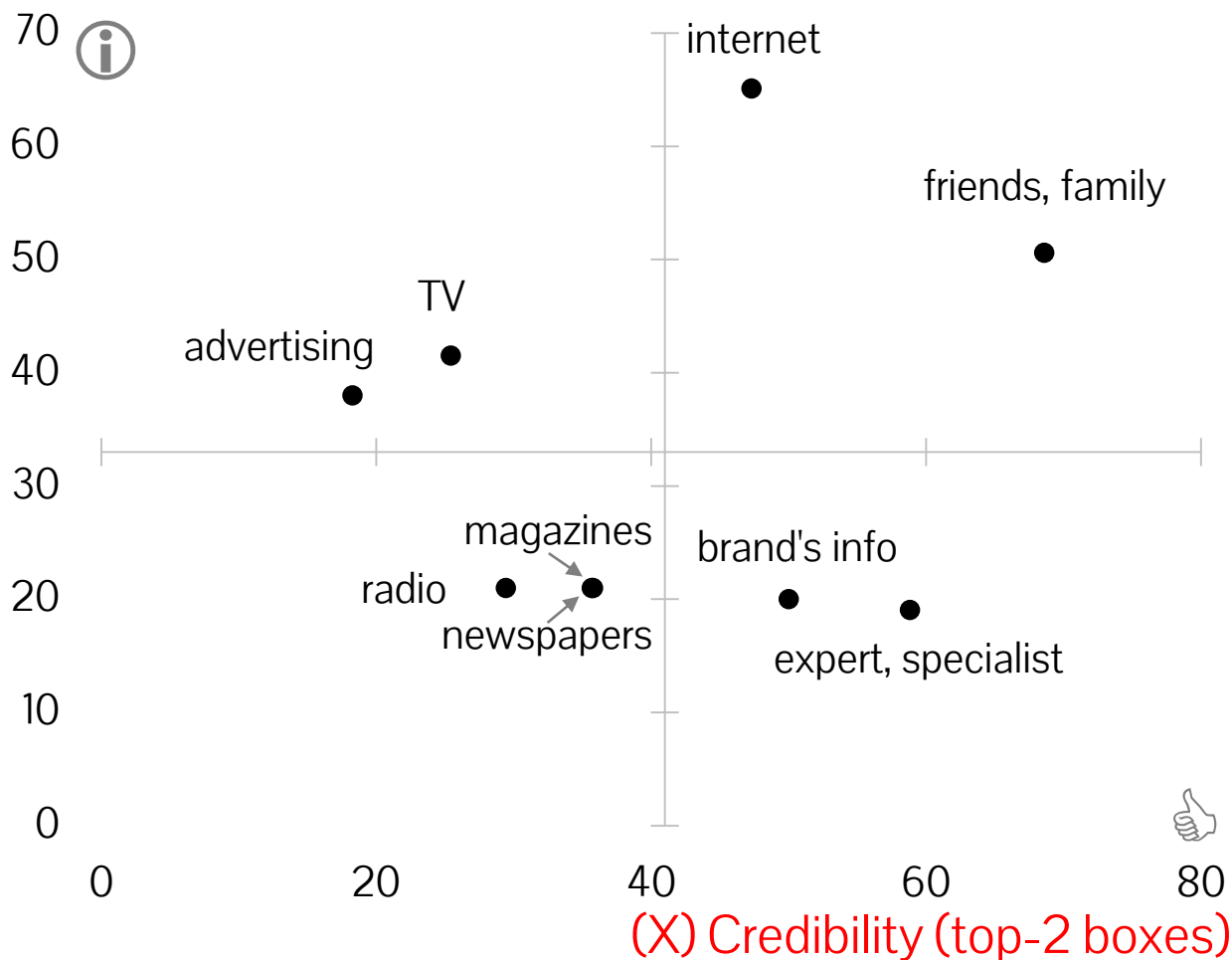
CJO8. To what extent are the following sources of information on (SELECTED PRODUCT/SERVICE CATEGORY) credible for you?

Filtered: e-consumers

Average % for all categories

Intersection of the axes represents means of all researched media

(Y) Usefulness



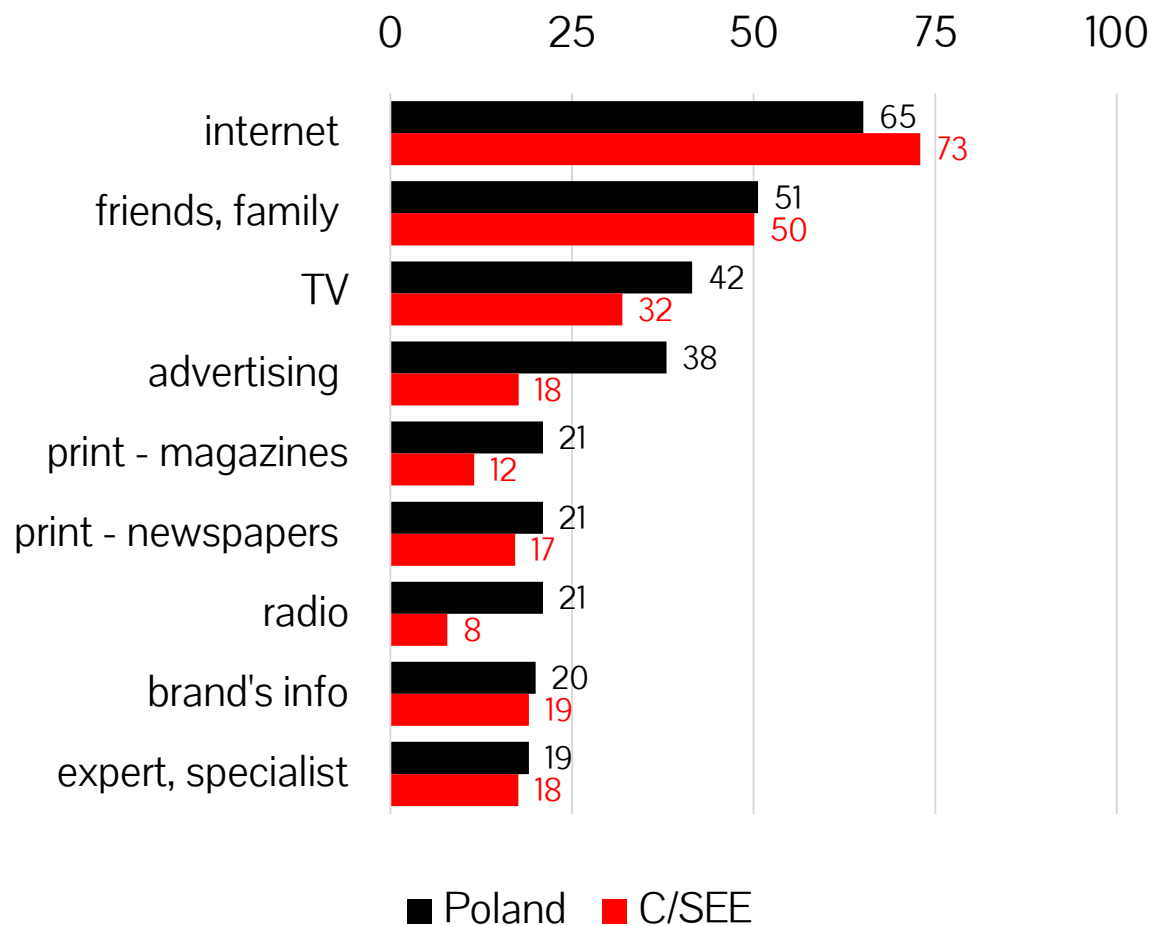
Sources of information – usefulness

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

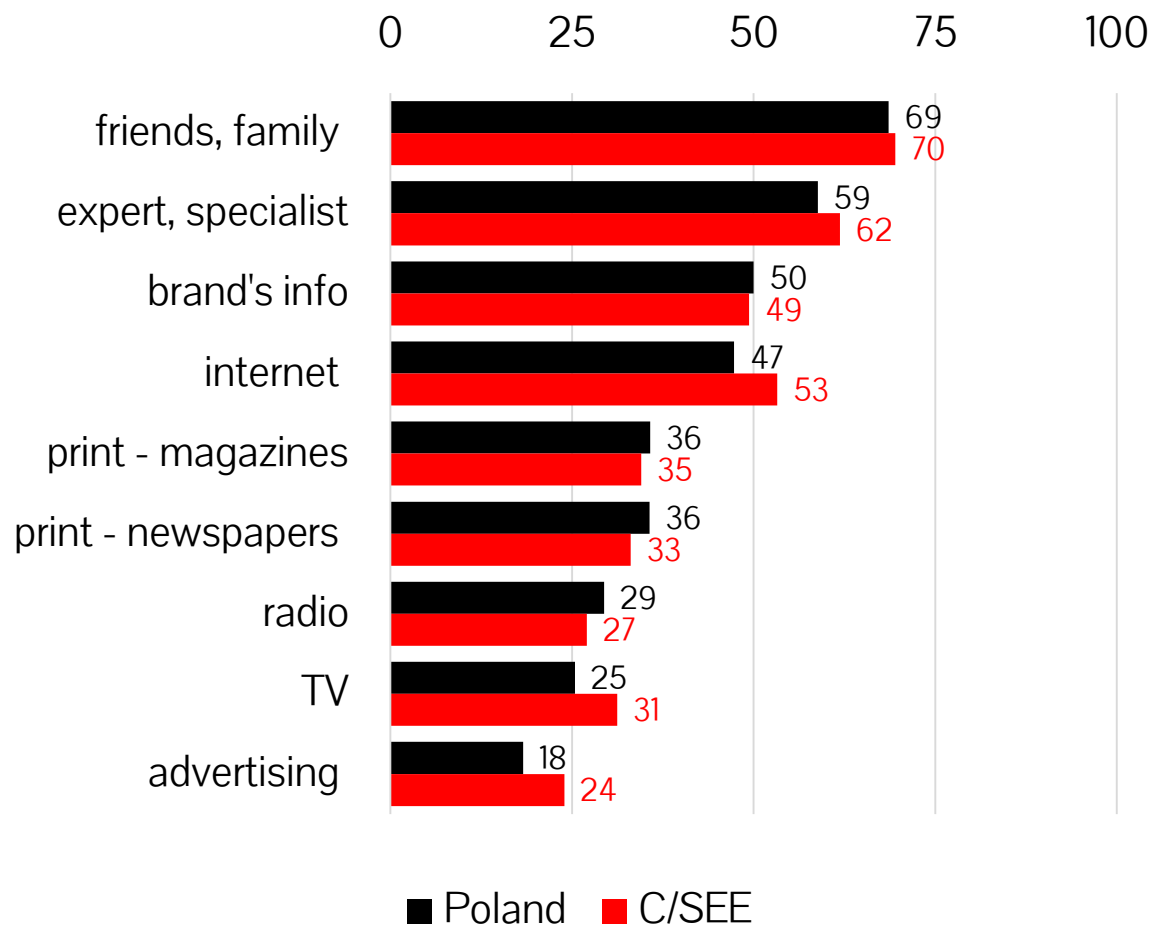
Q:

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



Credibility – details



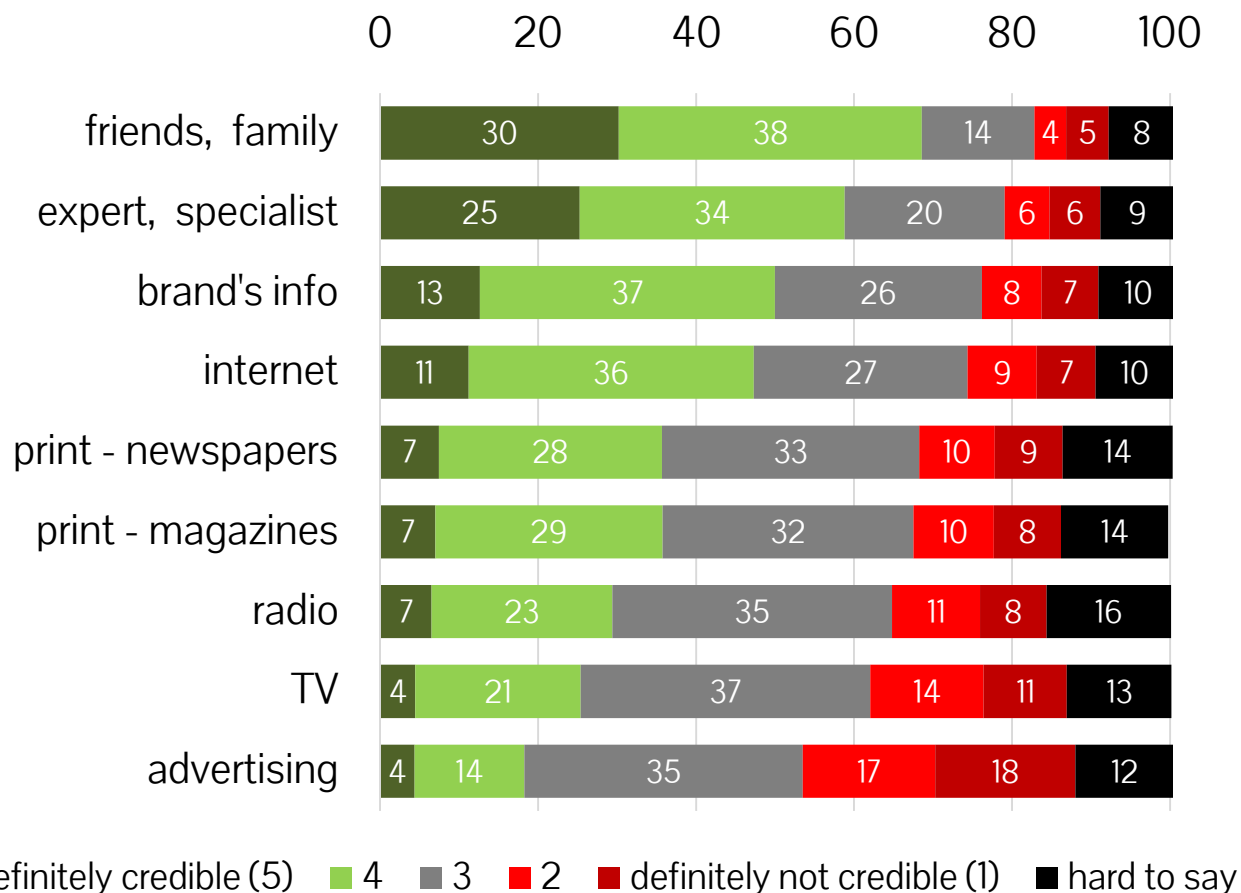
Poland

Q:

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



Internet VS offline triggers

Qs:

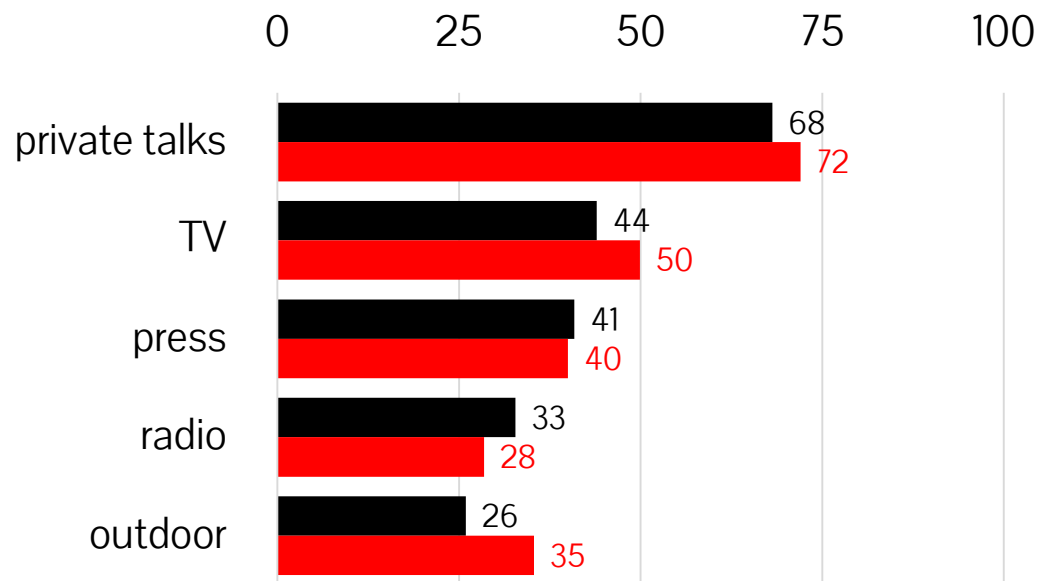
CJO9. Does it happen that you read, watch or search internet to find information on (SELECTED PRODUCT/SERVICE CATEGORY) under the influence of (LIST OF MEDIA)

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

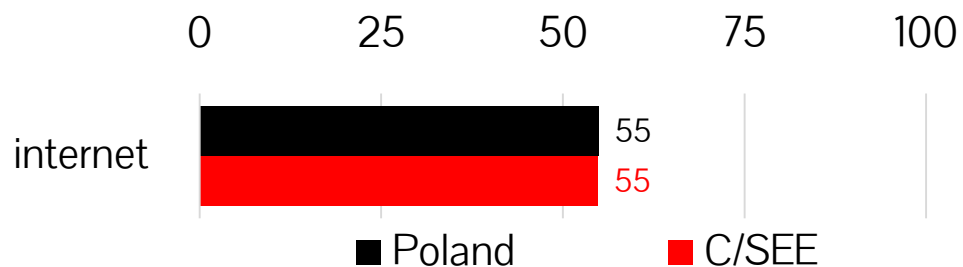
Filtered: e-consumers

Average % for all categories

Offline triggers to consumer journey online



Internet as the first touchpoint with a brand



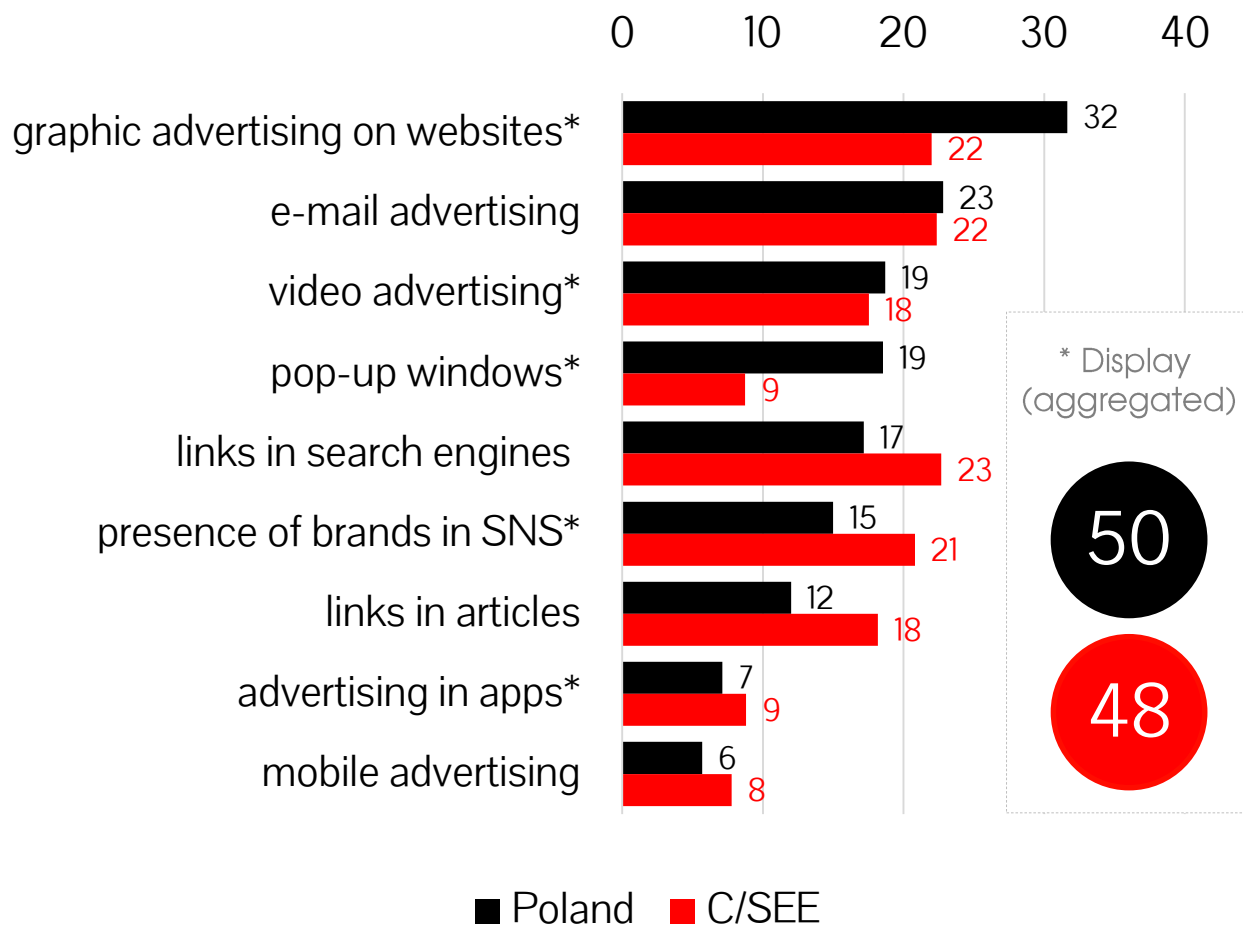
Online advertising triggers

Q:

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

Filtered: e-consumers

Average % for all categories



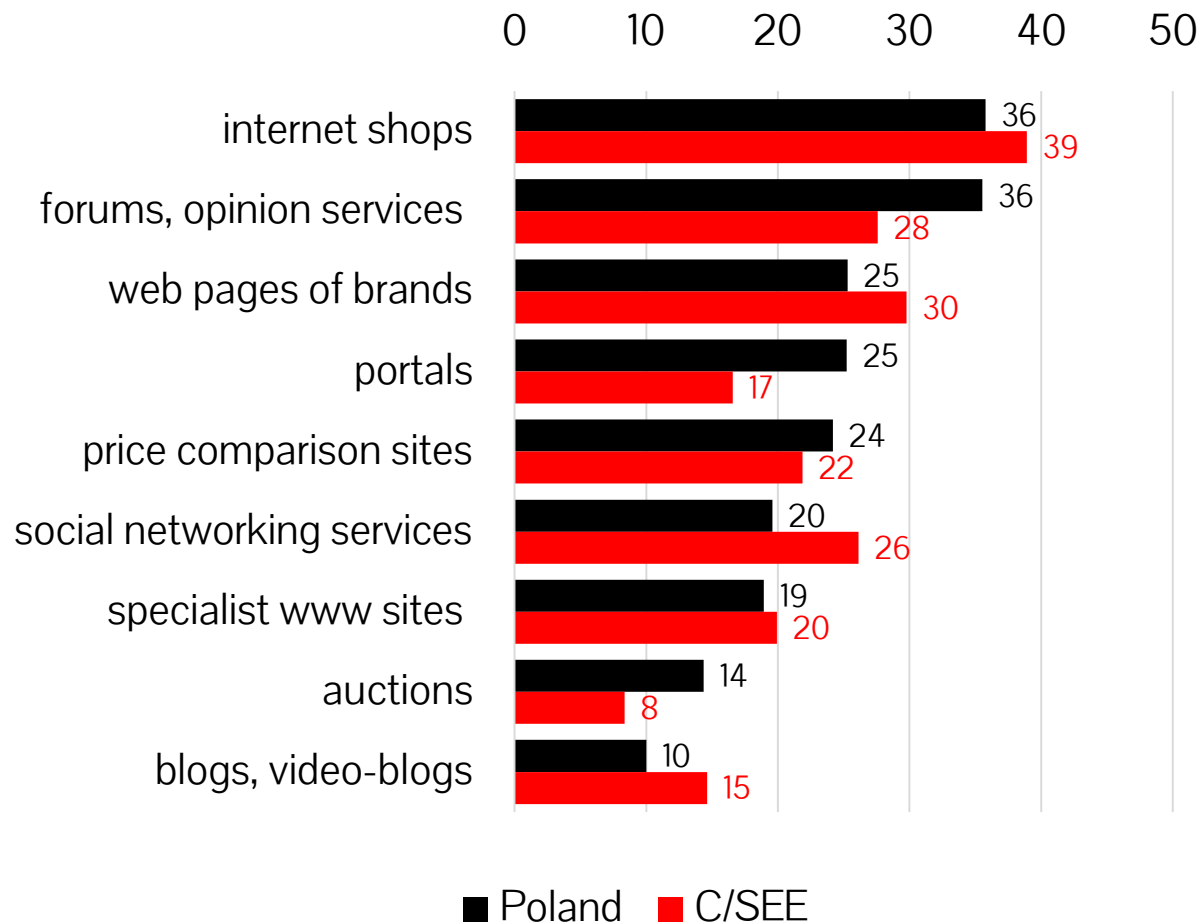
Research online

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



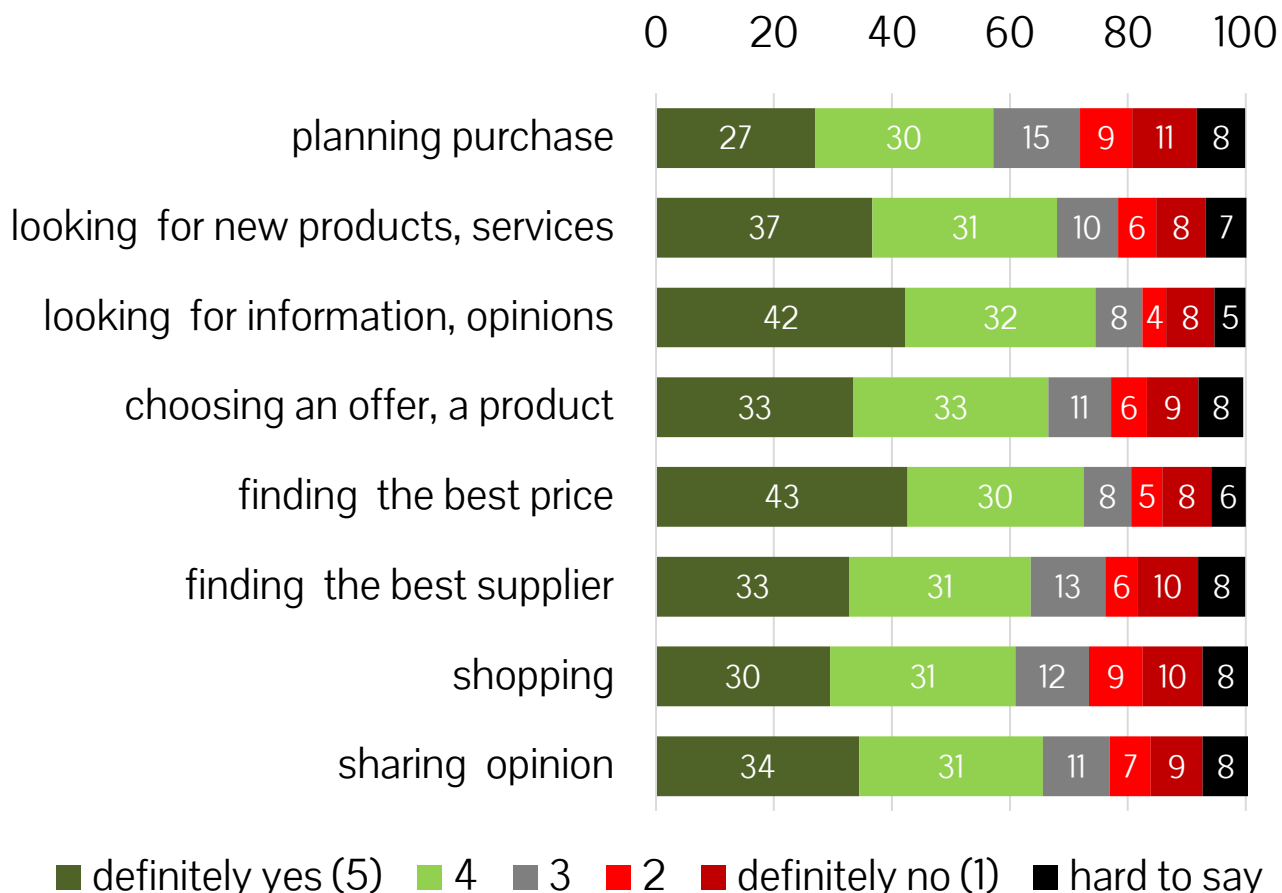
Poland

Q:

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

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.

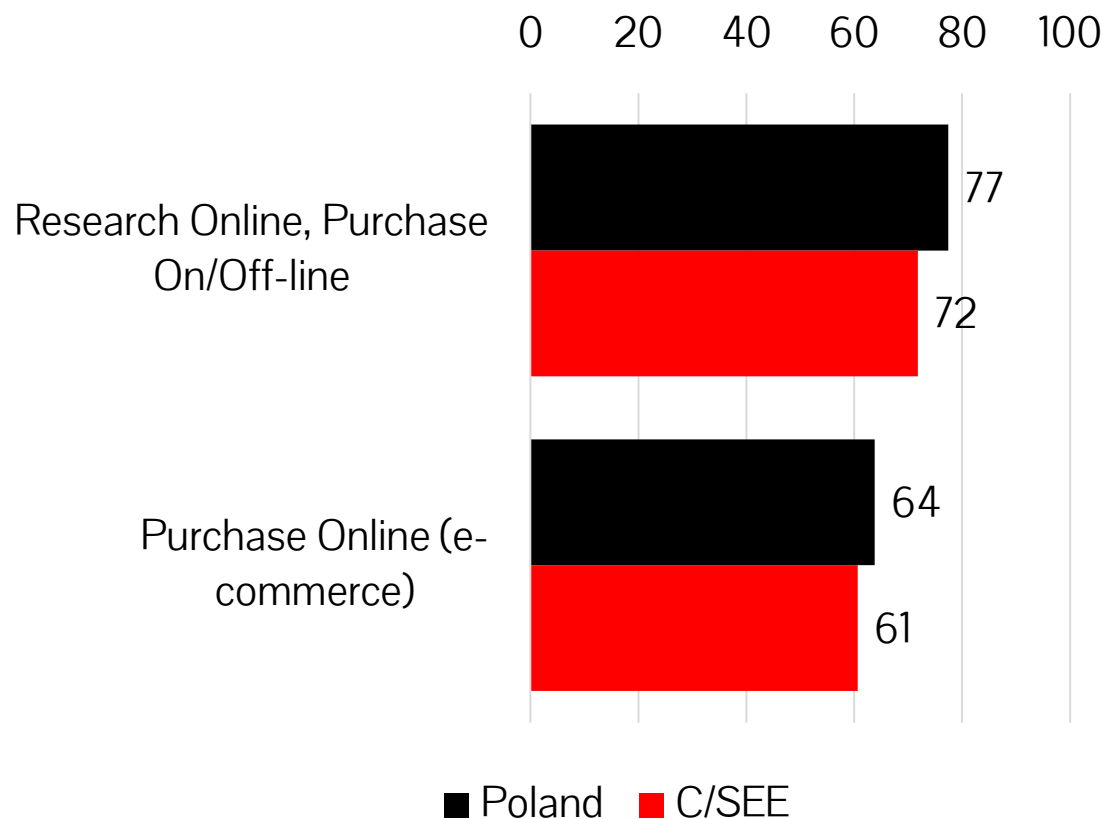
Purchase indicators (last 6 months)

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
%



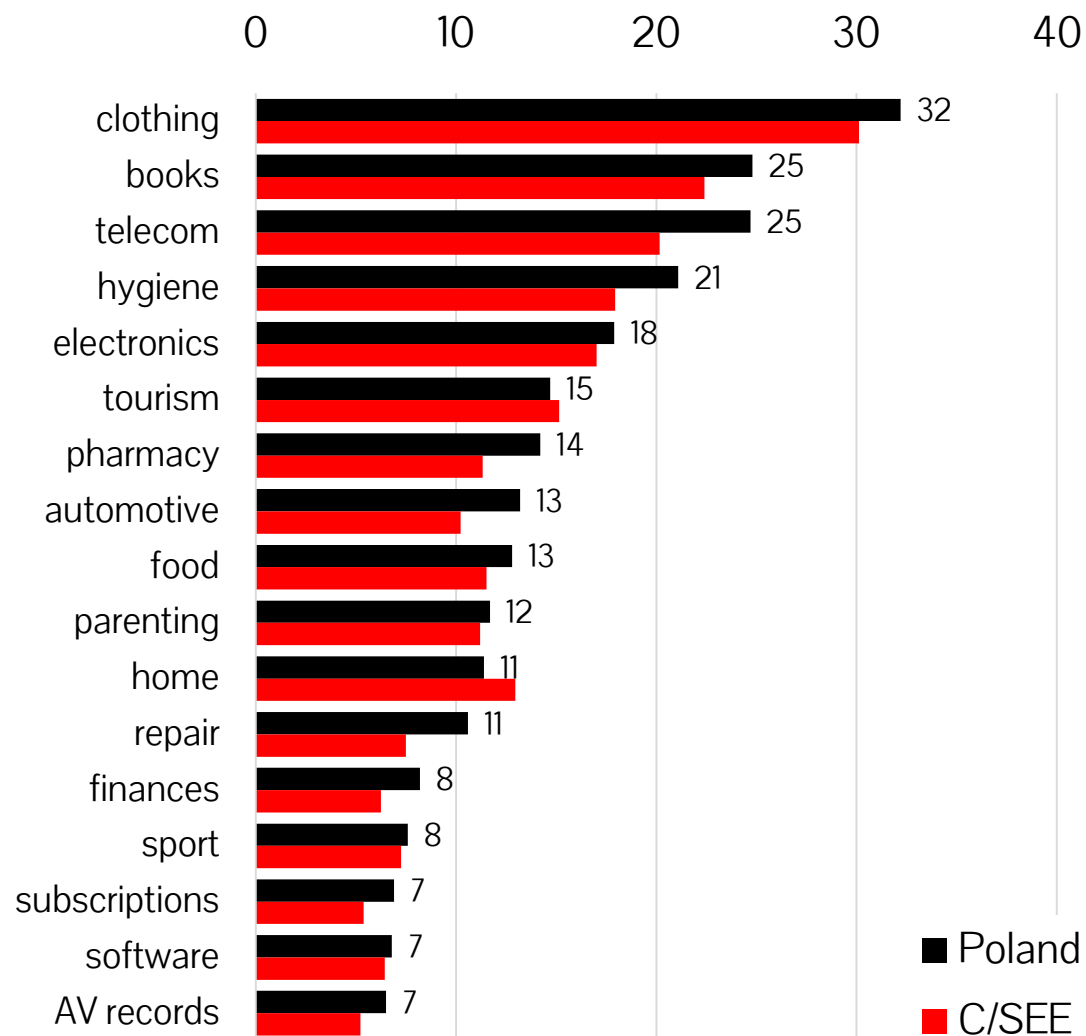
Research Online Purchase On/Off-line

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

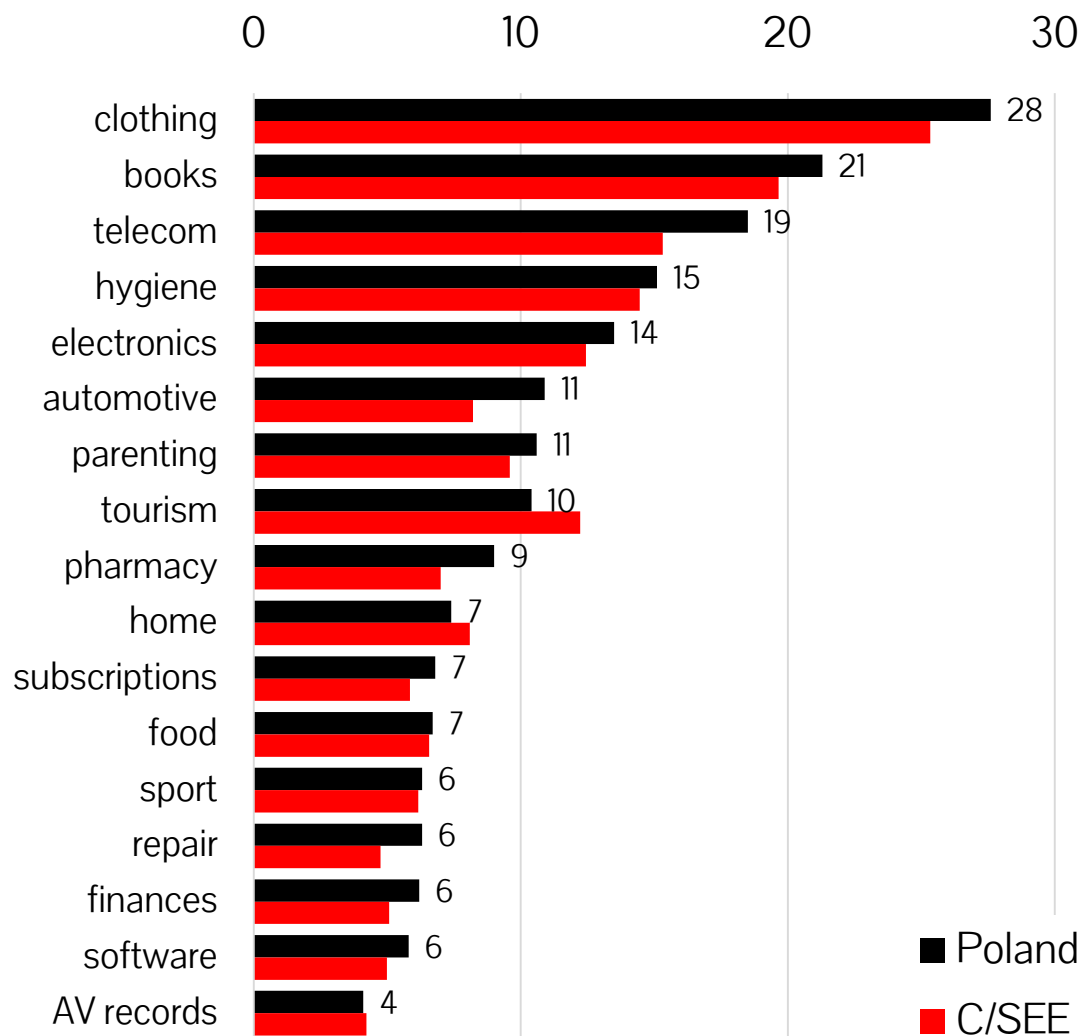


Purchase online

Q:

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
%



Conversion: research online



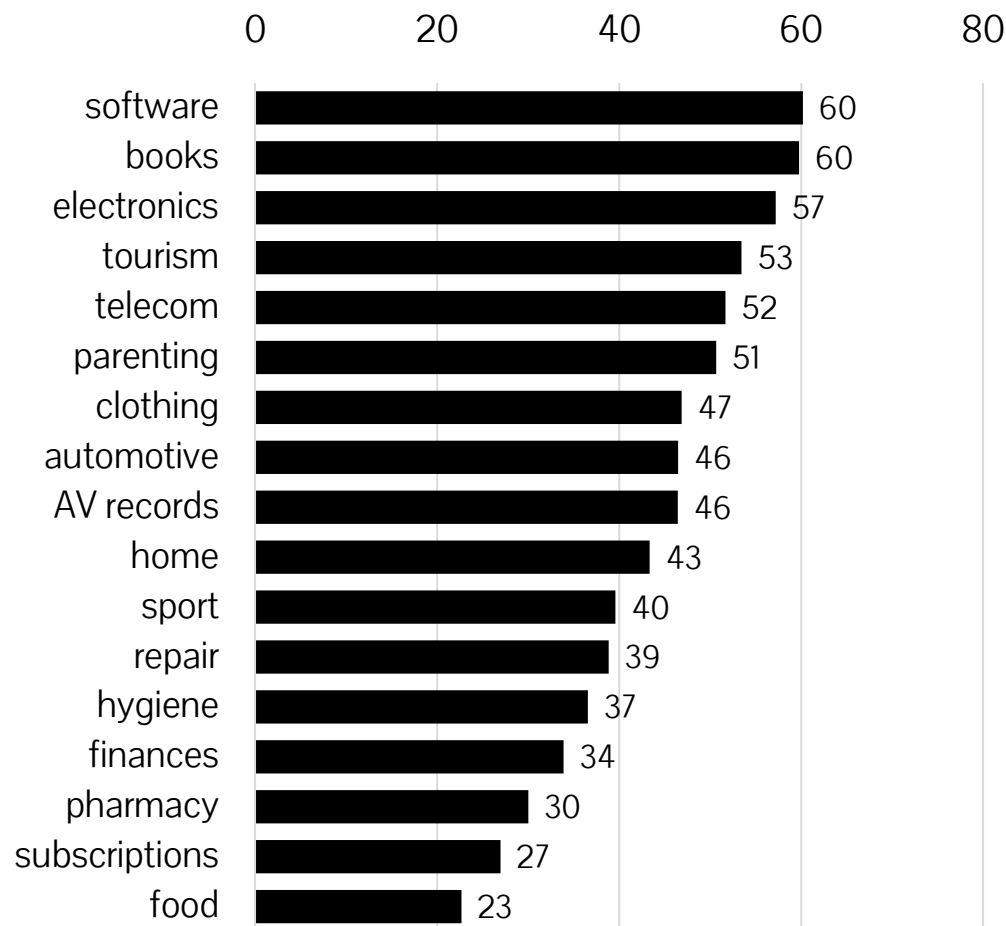
Poland

Qs:

CJO1. Which of the following products did you spend money on during last six months – as well online as offline?

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

Conversion = the share of internet users purchasing particular goods basing on research online among those who purchase these goods (online or offline)
%



Conversion: purchase online



Poland

Qs:

CJO1. Which of the following products did you spend money on during last six months – as well online as offline?

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

Conversion = the share of internet users purchasing particular goods online among those who purchase these goods (online or offline)
%

