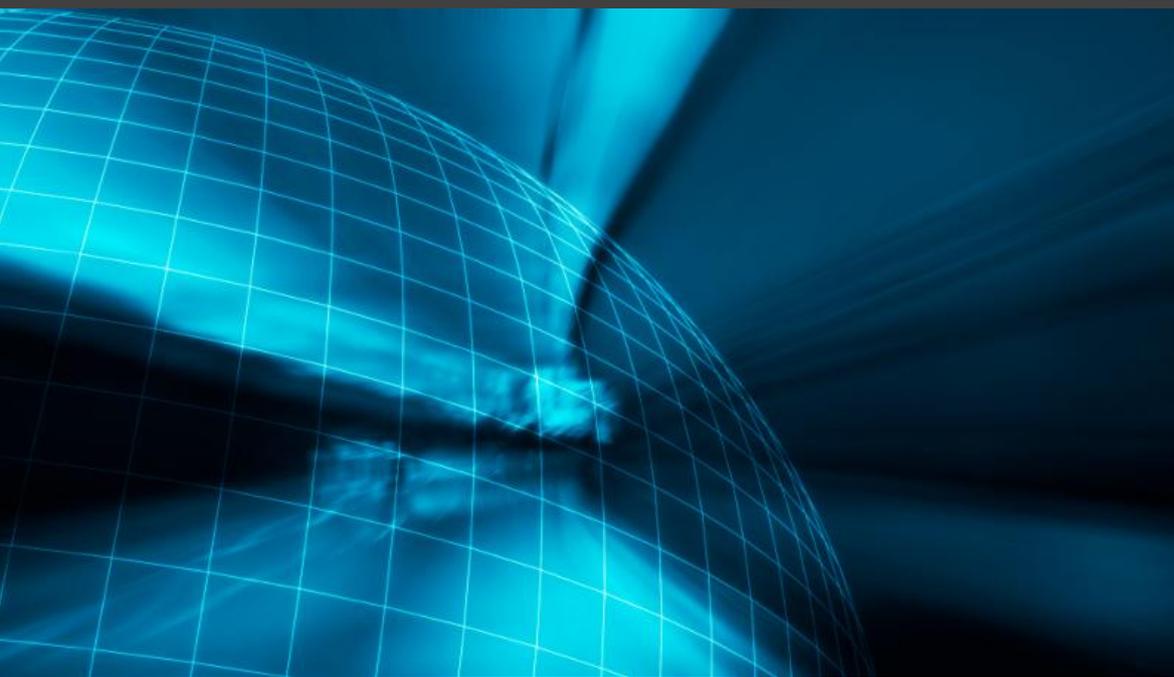


# Polish online advertising at the time of national mourning

Special Report by Gemius S.A.





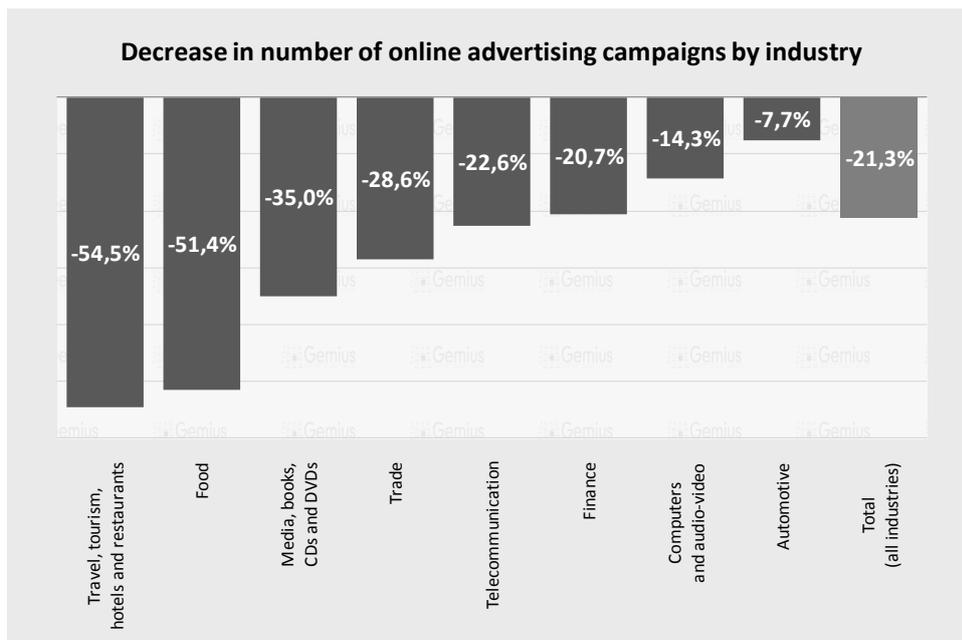
## Introduction

The first half of April 2010 was a special time for Poland and for many other countries. The crash of a government plane near Smolensk, in which the nation lost its President, his wife and 94 Members of Parliament, along with top military commanders and representatives of religious communities and social organisations, unleashed a storm of information. A storm which swept across nearly all media. Almost instantaneously repercussions of this tragic event also hit the internet. A significant increase was noted in the audience for Polish and foreign news sites and horizontal portals. An escalation in traffic was also reported by the biggest Polish social network, Nasza-Klasa, which observed a five-fold increase in the number of entries on its microblog. The site also revealed that on that tragic Saturday, 10 April, 2010, and the following day, users posted around 2.3 million photos, which is twice the usual number. Most of these pictures were directly related to the catastrophe.

The most consequential air accident in the history of post-war Poland was not only a catalyst for unusual internet activity. The week-long national mourning, declared immediately the tragedy was officially confirmed, had a profound influence on interactive media throughout the country. It was a long eight days, during which we were able to observe a set of phenomena far more symptomatic than the spectacular, yet short-term intensification of traffic on some sites.

One such phenomenon was the cessation of a significant proportion of internet display advertisements. For the duration of national mourning, many publishers altered the colour schemes and layouts of their websites, abolishing most or all promotional materials. Similar decisions were made by some advertising networks and advertisers, who, following different motives, decided to put their online campaigns on hold for the mourning period. In contrast to many other markets, the internet in Poland witnessed a clash of two usually contradictory processes – an increase in traffic generated by users and a drastic fall in traffic generated by ads. This extraordinary situation was the motivation to create this mini-report, which offers an analysis of key data obtained with gemiusDirectEffect. To illustrate what was happening to advertisements on the Polish internet, this report compares two periods: the week of national mourning (10.04 – 18.04) and an analogical week in March 2010 (13.03 – 21.03).

## Part of advertising campaigns suspended



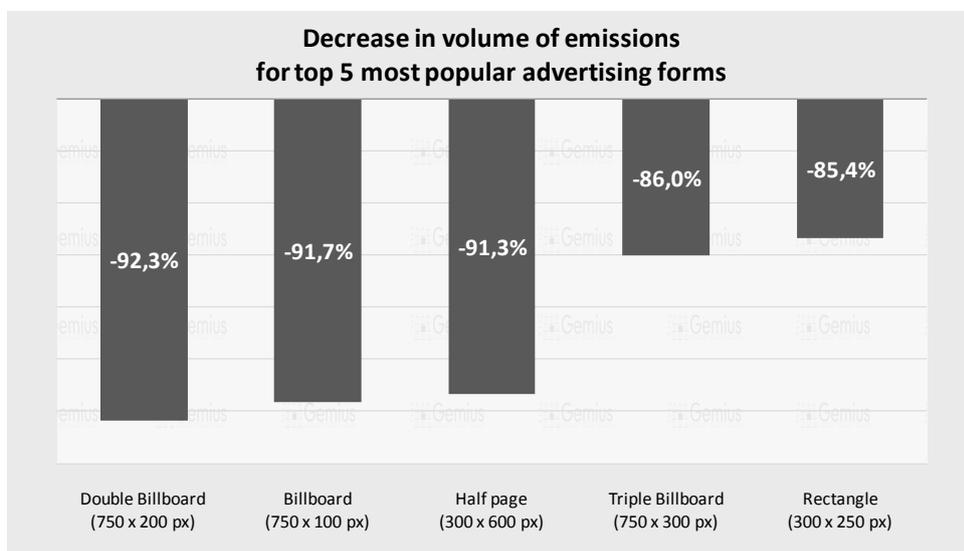
First and foremost, for the Polish internet national mourning was a time when an enormous number of campaigns were either suspended or called off. Between 10 and 18 April 2010, the promotional activity of key industries dropped unprecedentedly. The most significant fall in the number of campaigns (in relation to the analogous week in March this year) was noted for tourism and food. In both cases, the number of online campaigns run at the time of mourning decreased by over a half. Companies and institutions operating in the tourist, catering or hospitality sector toned down their online advertising most significantly – the number of campaigns dropped by 54.5% at the time of mourning. However, this was not only due to reasons directly related to the Smolensk crash. The most important of these factors were also:

- » the inherent characteristics of the tourist industry – travelling and holidays are associated with entertainment, a quality not promoted during national mourning,
- » a large proportion of tourist services is related to air transport, which after the tragic event involving a TU-154M could be perceived by travel office clients as less attractive or trustworthy,
- » events related to the funerals of the victims coincided with the eruption of the Icelandic Eyjafjallajökull volcano, which paralysed air traffic over most of Europe – the commotion caused by the communication chaos in a natural way impeded the advertising activity of tour operators and transport companies.



Among other industry sectors that markedly reduced the number of internet based advertising campaigns during national mourning were: media, trade, telecom and finance. The list closes with two sectors: computers and audio-video (-14.3%) and automotive, which in the week in question reduced their online presence the least (-7.7%).

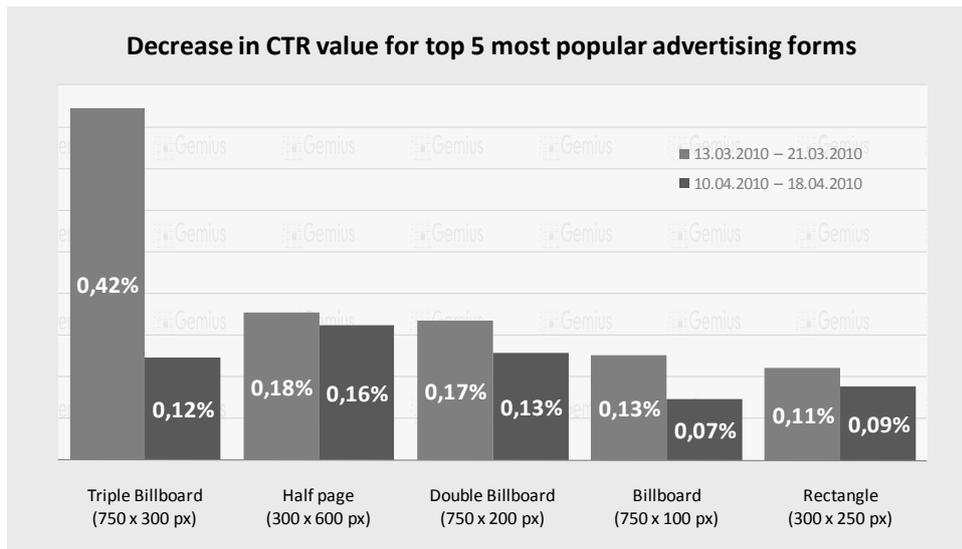
### *Dramatic drop in volume of displayed adverts*



The radical cuts in internet advertising implemented by key sectors and decisions on suspending publication of advertisements on websites taken by online publishers, had a dramatic influence on the reduction of the overall number of displayed online ads. The real impact of this phenomenon can be very well illustrated by comparing the volume of displayed ads for the week of national mourning and for the analogous week of March 2010. This comparison takes into account the number of displays broken down into five most popular forms of graphic adverts (display). The three most often used types of creatives, i.e. Double Billboard, Billboard and Halfpage were almost entirely withdrawn for the period of mourning. The fall in the number of displays was huge: -92.3%, -91.7% and -91.3%, respectively. Not much less was lost by Triple Billboard (-86%) and Rectangle (-85.4%). It should be noted that, in reality, these percentage values mean millions of non-displayed creatives. This fact is the ultimate measure of the "comatised" Polish online advertising space during these few long days.



## Users click on ads more rarely



The final symptom of the changes taking place during the period of national mourning was the drop in the value of the CTR for the most popular forms of graphic ads. This decrease turned out to have affected all five most often used display forms, and for some it was also characterized by a large amplitude. The most evident example of an ad that recorded a serious loss in "clickability" is the Triple Billboard (750 x 300 px). The mean CTR for this between 10 and 18 April 2010 amounted to 0.12%, while in the comparable week of the previous month, the value was stable at 0.42%. A significant loss was also noted for the Billboard (750 x 100 px), for which the mean CTR dropped almost two-fold during mourning (from 0.13% to only 0.07%). None of the five most prominent forms of display ad survived the week without a loss in the number of clicks made by Polish internet users. It seems that the week of Polish mourning had its effect on internet advertising not only in the decisions made by owners and administrators of websites or on the models of advertising network activities, but also on the behaviour of internet users themselves. The suspension of a great number of campaigns and the drop in online advertisement displays coincided with a marked reduction in the internet users' interest in this type of content. The black week in question was indeed a time when the Polish internet advertisement was less visible and intrusive than ever before.

## *About the report*

This report was prepared by Gemius S.A. Desk Research Team. It contains data from gemiusDirectEffect system – one of the most popular systems used for the monitoring of online advertising in Poland. Thanks to the high market position mentioned, the system collects data on most display advertising and mailings. The full and detailed statistics for both are available in the form of gemiusAdMonitor monthly reports.

## *About Gemius*

Gemius - an international research agency, the leader and forerunner in the field of research of the internet and on the internet in Central and Eastern Europe.

The Company has operated on the Polish market since 1999, offering comprehensive research solutions for investigating internet user behaviour on chosen websites (gemiusTraffic), internet user socio-demographic profiles (gemiusProfile) and effectiveness of internet advertising campaigns (gemiusEffect).

In cooperation with PBI, Gemius conducts an overall audience and internet application measurement Megapanel PBI/Gemius.

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