

State of the Web '11

a report by **wakoo**pa

17th of January, 2012



A brief introduction

Welcome everybody to our first State of the Web 2011. This report explores consumer behavior on high level in a mature market while uncovering some pretty amazing details along the way.

Topics

The following topics will be discussed in this report:

- General statistics; how do consumers spend their time online?
- Social networks; the rise of Facebook.
- Search; is anyone able to threaten Google?
- News; what news is most read?
- Shopping; multinational vs. national suppliers.
- Advertising; a brief view on the advertising landscape.

About the data; method and sample

With our unique technology we tracked the digital lives in 2011 of a representative panel which consists out of 10.000 Dutch consumers.

About us

We're Wakoopa. We've developed user-centric audience measurement technology which enables you to track the behavior of your own panel. We register what websites they visit, the search terms they use and the ads they see. You can then analyze that data in our dashboard. It really can deliver amazing insights.

Our technology already measures more than 50.000 consumers in 20+ countries for more than 40 customers such as Ipsos / Synovate, TNS, Google and the European Committee.

Have fun reading this report. If there are any questions don't hesitate to contact us. You can reach me at simon@wakoopa.com or +316 41 22 37 35.

Best,

Simon van Duivenvoorde,
Business Developer

General Statistics


What does the digital year of a consumer look like?

General Statistics

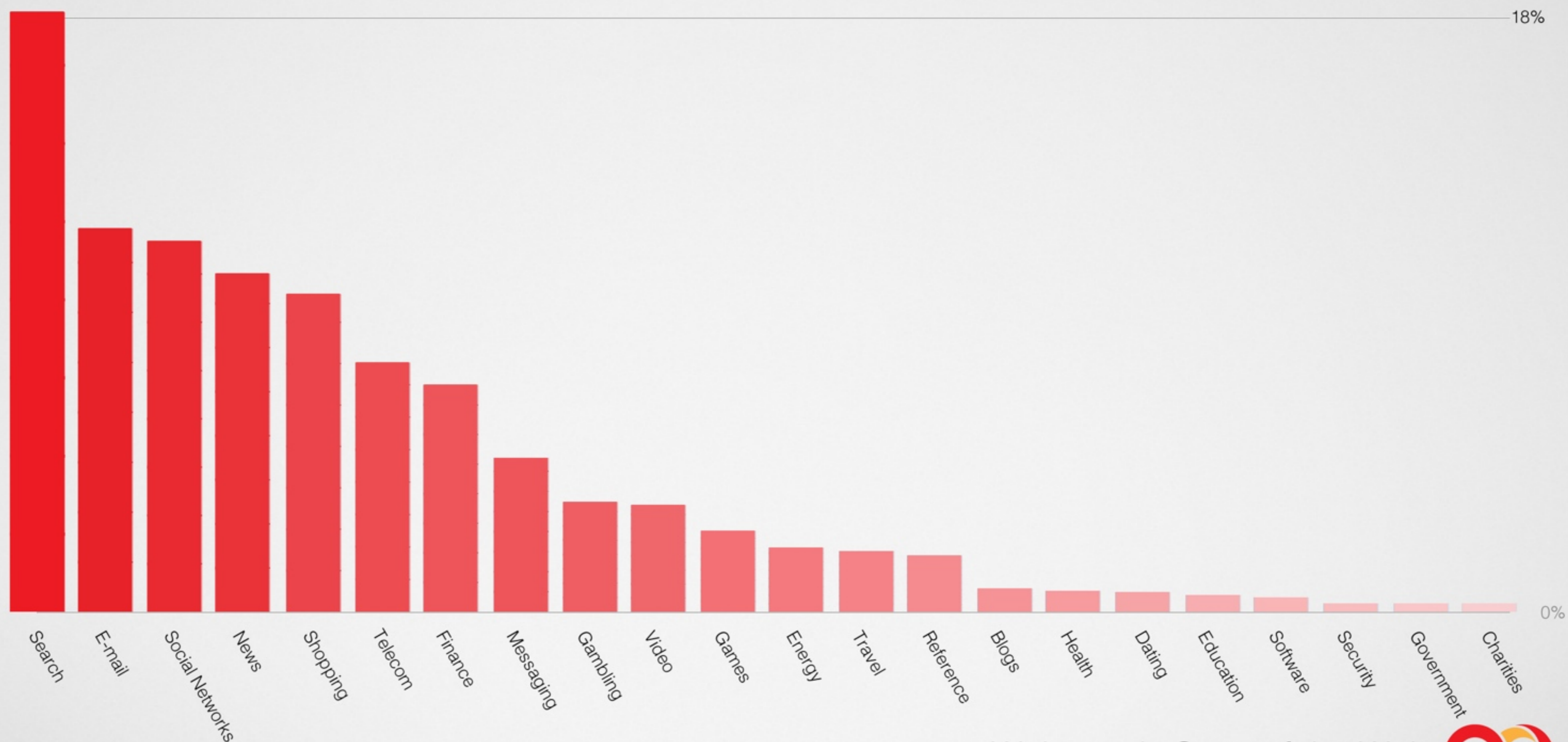
Search most frequently visited by consumers

Search is the category most frequently visited in 2011 with a 18.5% share of the total number of visits. This is followed by e-mail at 11.8%. The amount of visits on social networks is rather similar to news and shopping.

The categories consists out of the overall top 500 sites based upon our data. A visit is defined as a (series of) pageview(s) within a group of URLs from the same participant with a time of no more than 30 minutes between each pageviews.

 The total number of visits we registered in 2011 was 27.361.021.

Graph: Shares based on the total number of visits in 2011



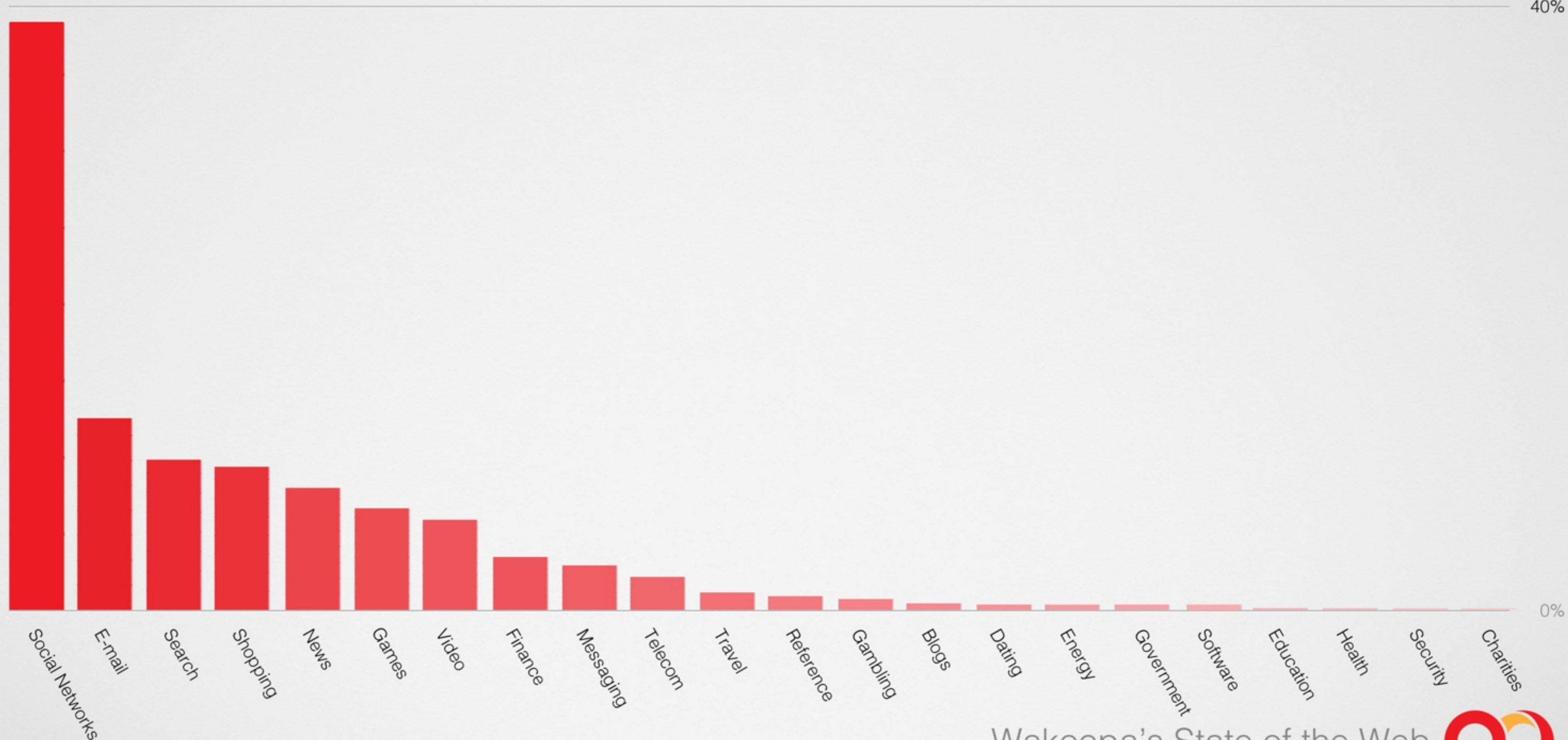
General Statistics

Most time spend on Social Networks

Consumers spend more than one third (37% to be exact) of their time on social networks. This is even more remarkable when the amount of visits, 11.4%, is taken into account. This intensity of usage is unparalleled by other categories. With e-mail, at 12.1%, it almost makes up half of the time that consumers are online. The next quarter consists out of search (5.7%), shopping (5.4%) and news (4.6%). The distribution of visits is more evenly spread compared to time spend online. In total the panel was more than 103.000 days online.

🌀 75% of the time online is spend in 5 categories; social networks, e-mail, search, shopping and news.

Graph: Share or categories based total amount of time spend in each category in 2011

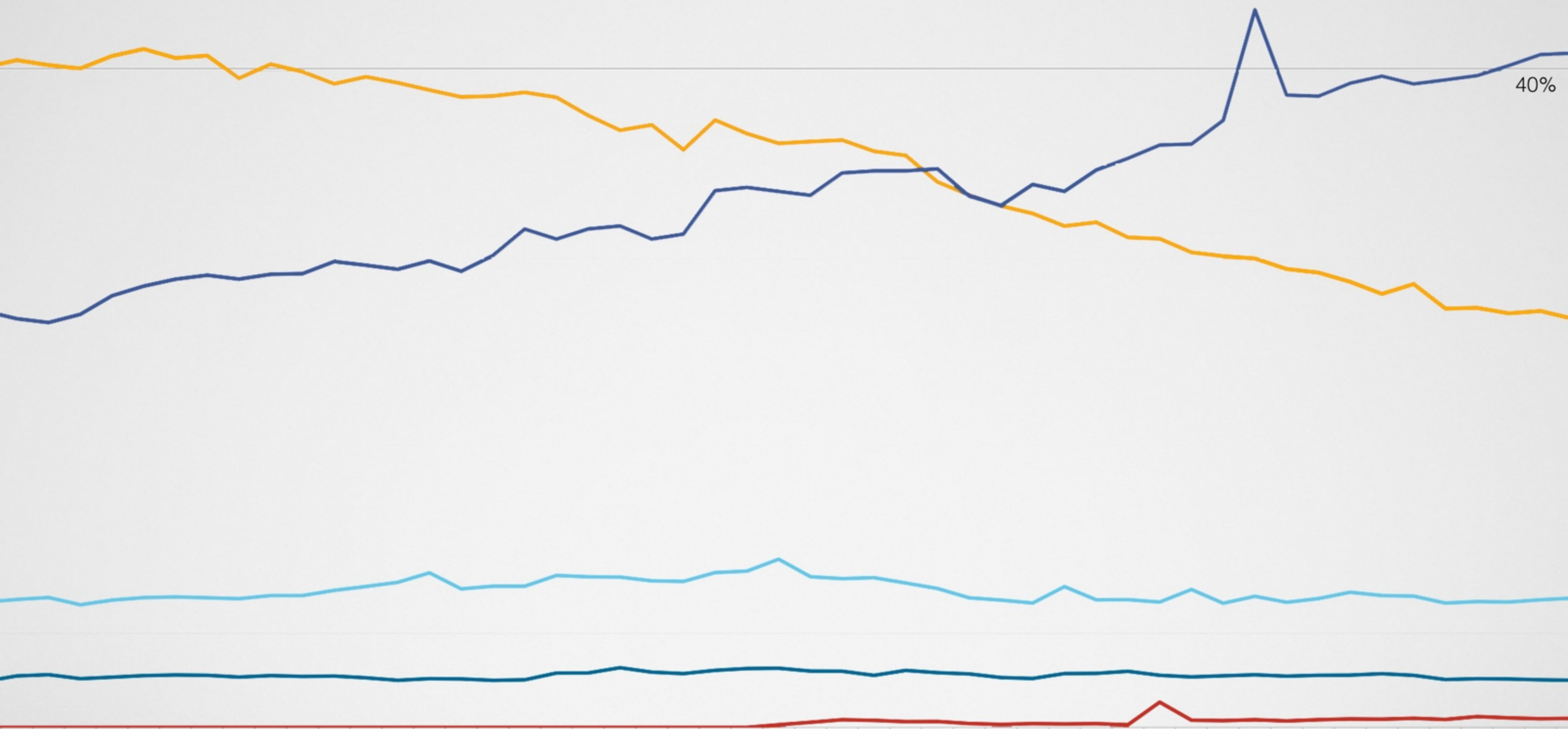


Social Networks

No longer friends. Who's winning the social game?

Social Media

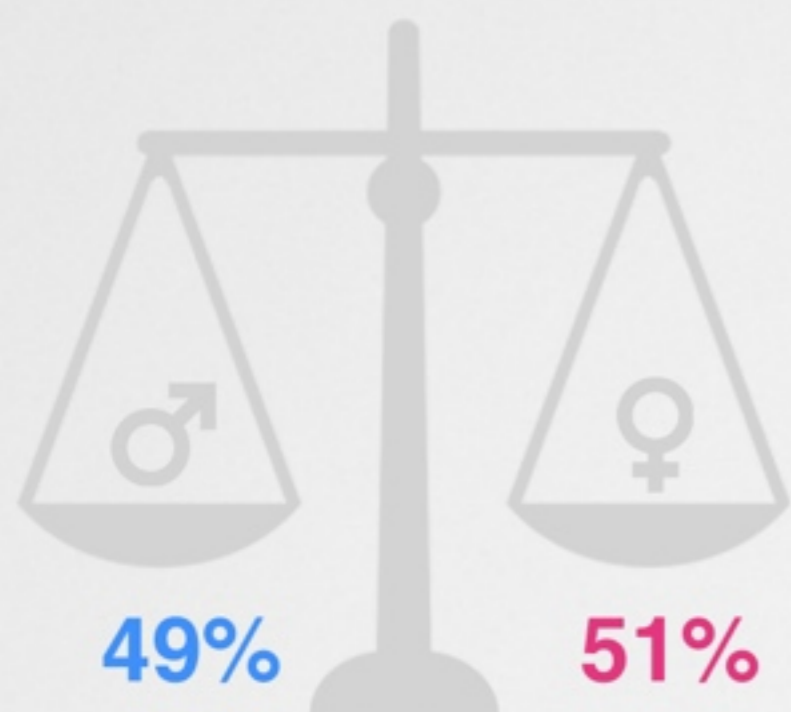
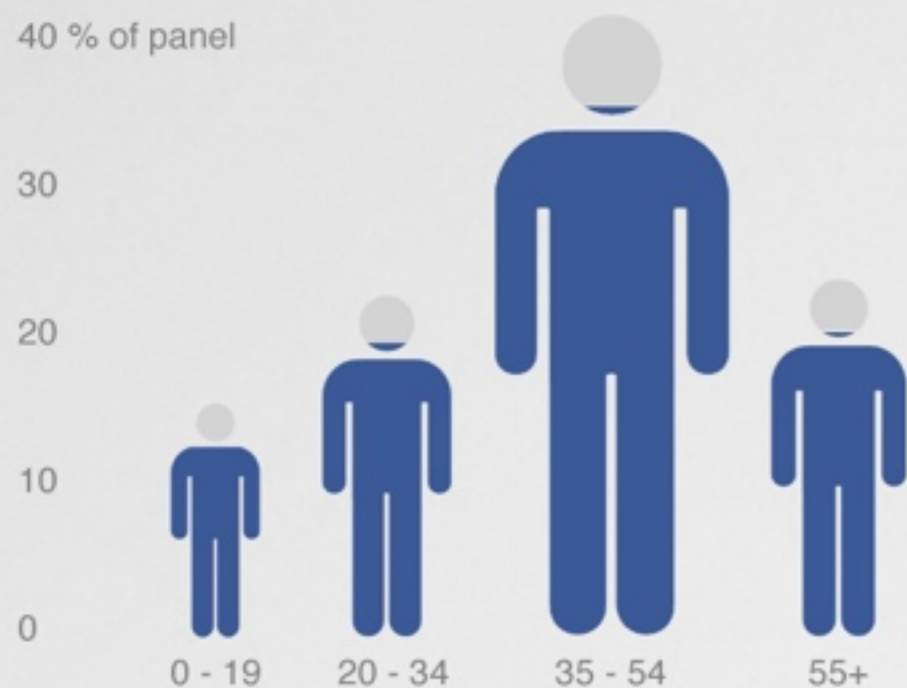
Facebook vs. Hyves vs. Twitter vs. LinkedIn vs. Google+



Graph: Daily unique visitors on social networks as percentage of total panel throughout 2011

Social Media

facebook

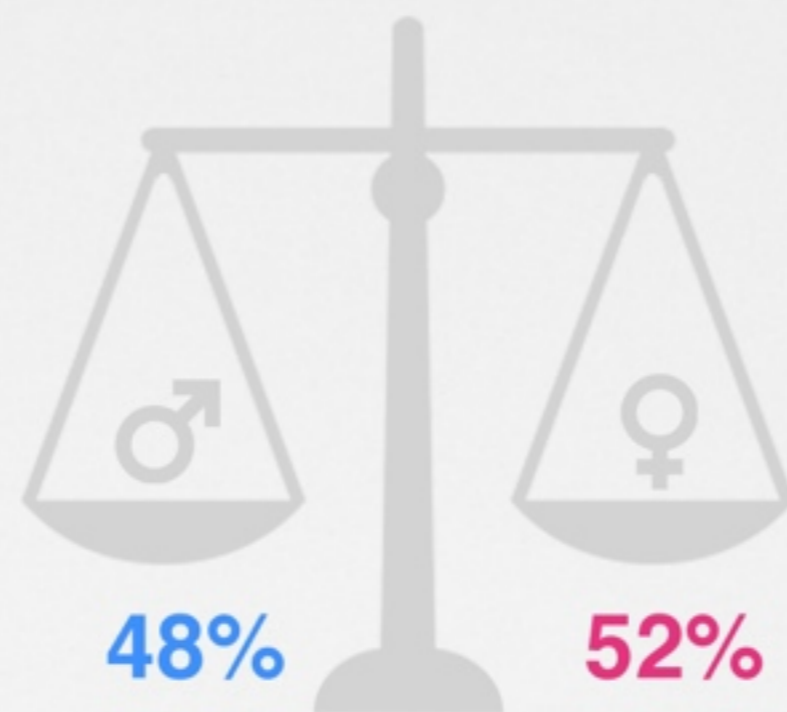
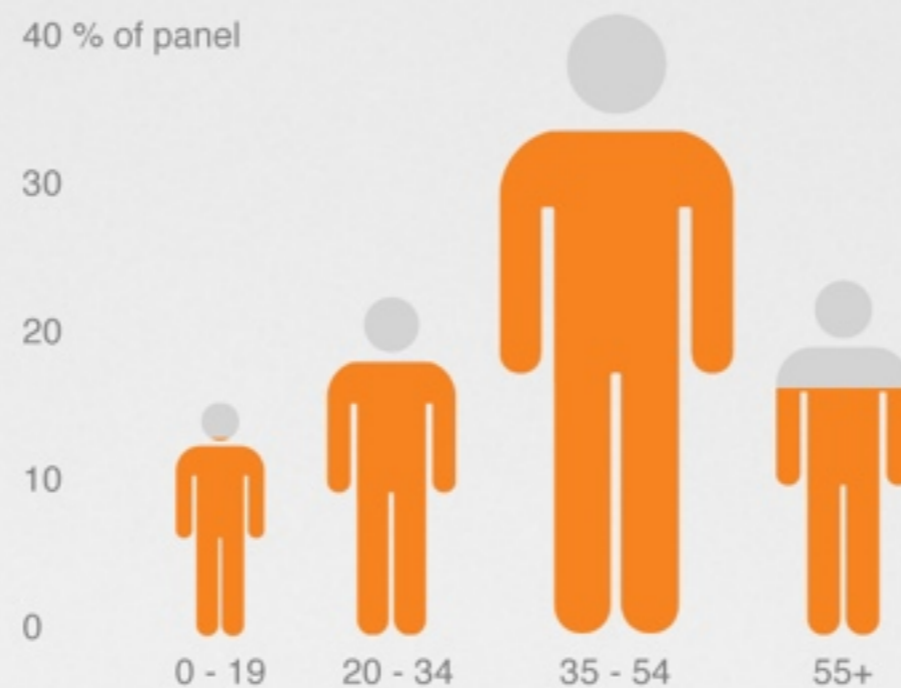


14:14 12:29
15:20
avg. length of visit

25.4 22.2
27.4
avg. pageviews per visit

81.7 78.7
84.9
% penetration within panel

Hyves

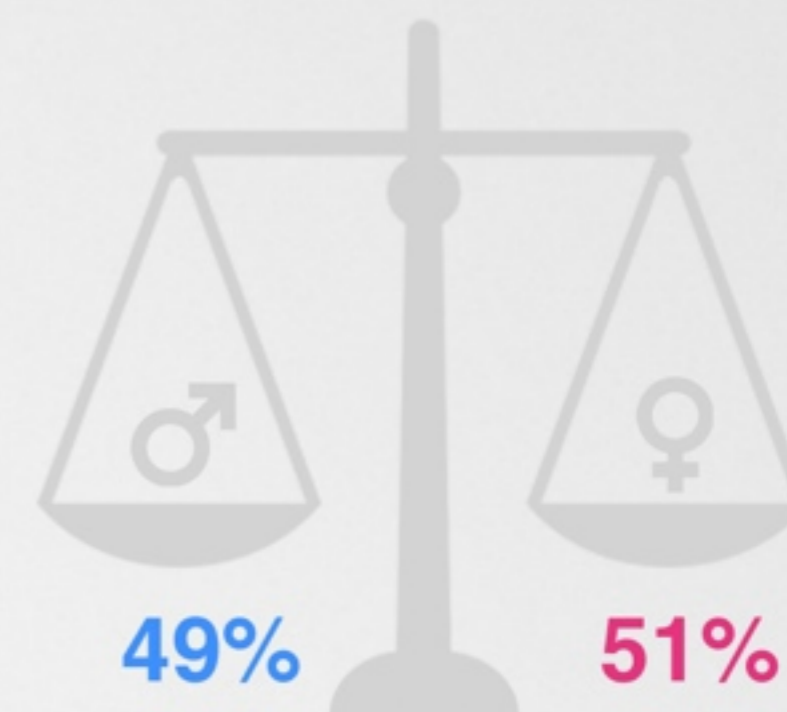
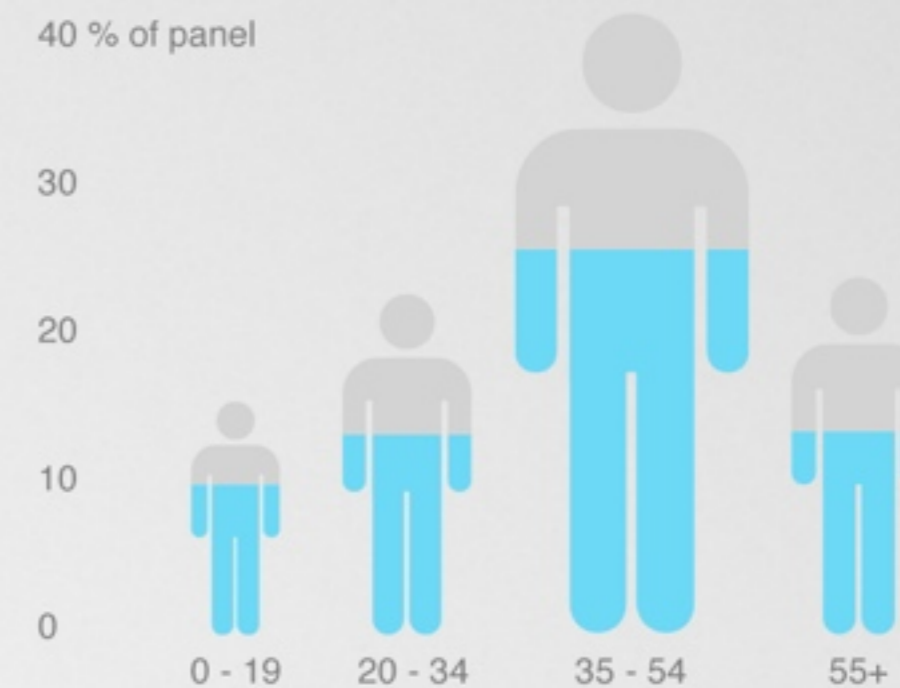


15:17 14:17
15:49
avg. length of visit

21.6 20.6
22.2
avg. pageviews per visit

76.4 70.9
82.2
% penetration within panel

twitter



4:48 4:34
4:58
avg. length of visit

9.1 8.8
9.2
avg. pageviews per visit

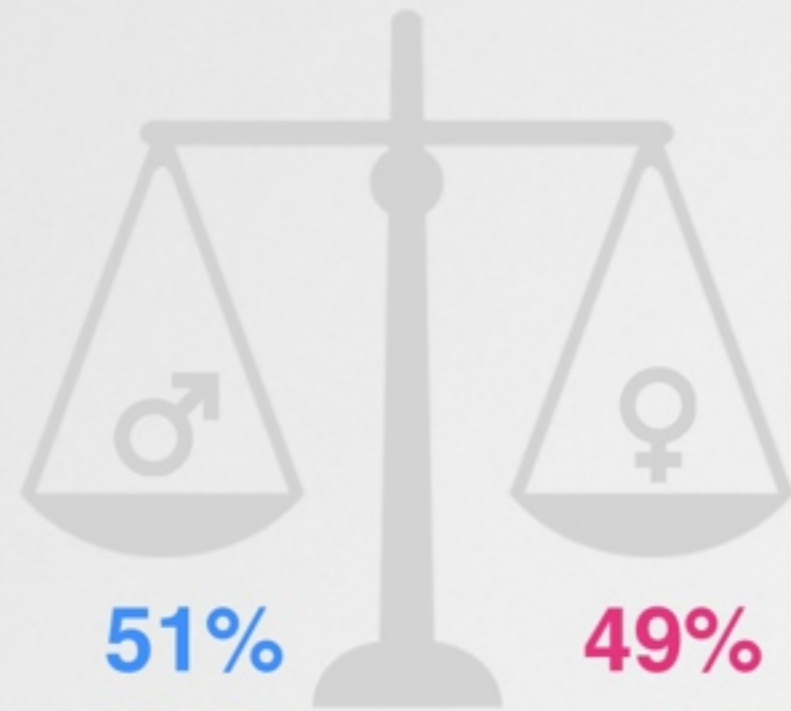
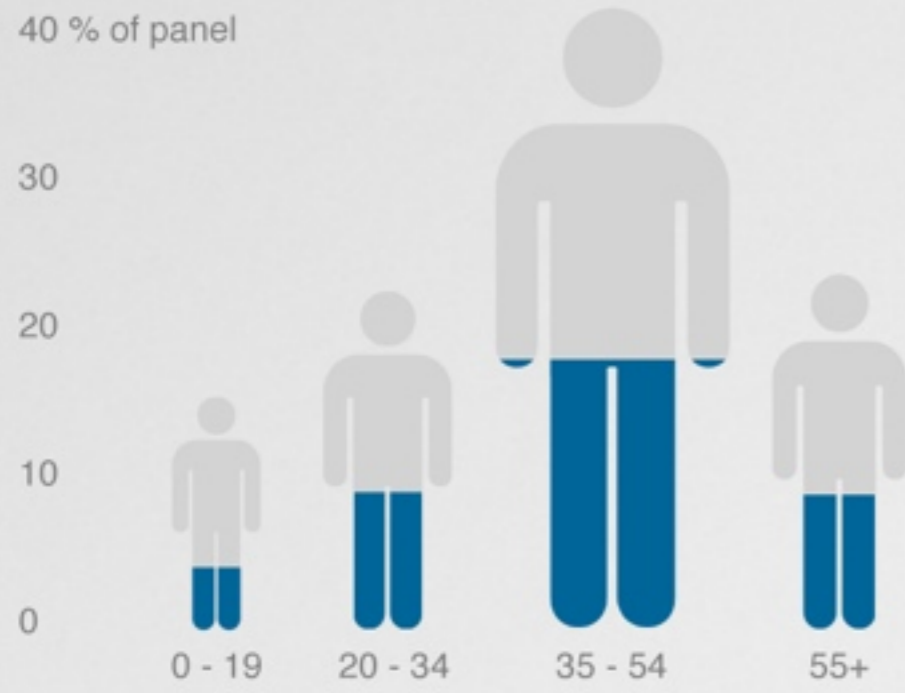
58.6 55.8
61.4
% penetration within panel



Social Media

LinkedIn

40 % of panel



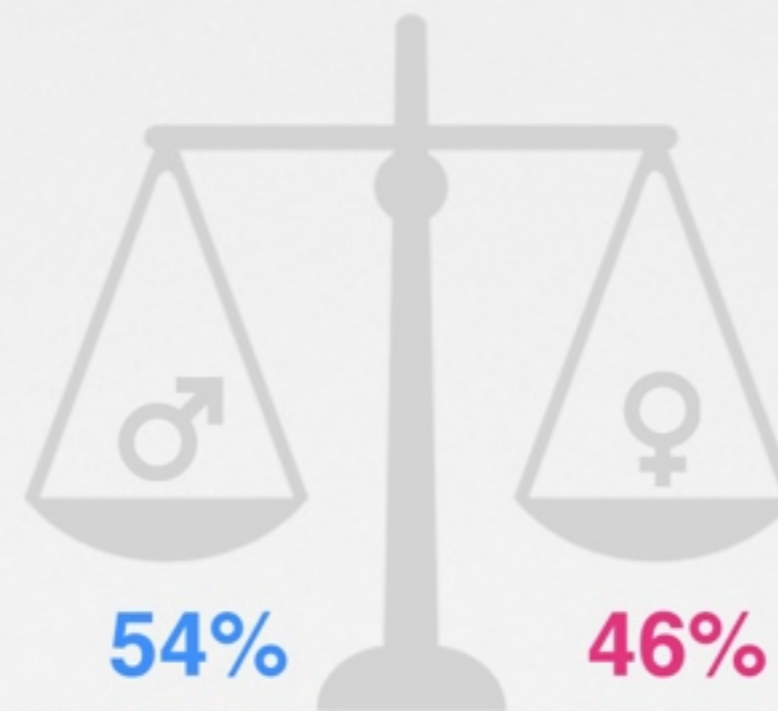
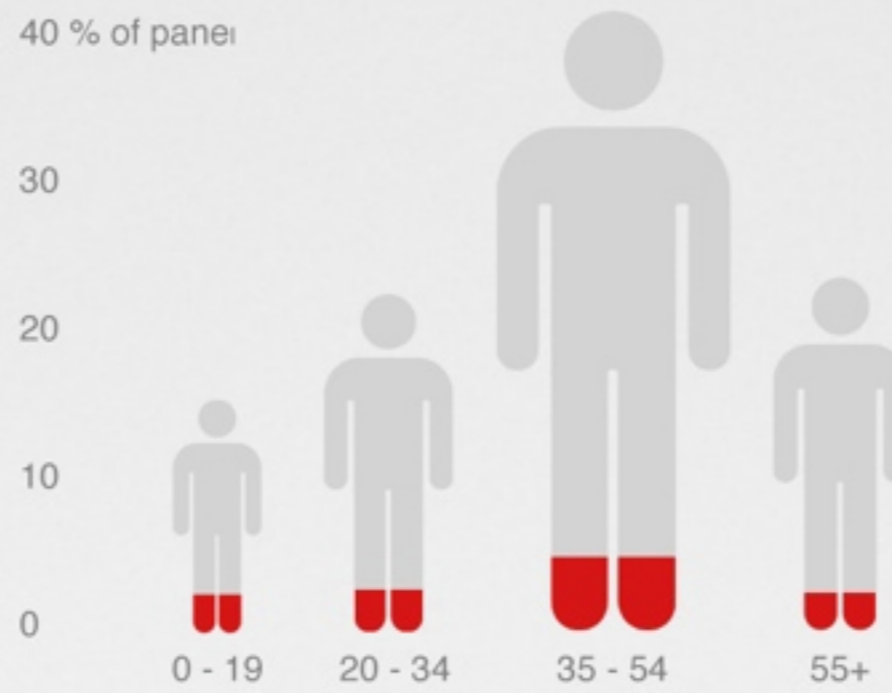
3:13 3:19
3:05
avg. length of visit

8.4 8.7
8.0
avg. pageviews per visit

39.3 39.1
39.7
% penetration within panel



40 % of panel



5:57 7:31
4:09
avg. length of visit

8.5 9.1
7.8
avg. pageviews per visit

11.1 11.7
10.5
% penetration within panel

Social Media

In 2011 **facebook** overtook *Hyves* as the most popular social network in The Netherlands

On the 16th of July 2011 Facebook passed Hyves, for the first time, to become the biggest social network in The Netherlands based on total amount of unique visitors that day. Since then it steadily increased its dominance in the market as is shown in the graph on the first page of this segment.

- 🕒 The engagement numbers of Facebook are amazing. Some days it reaches more than 40% of the audience. This intensity is unmatched by others. Its reach is sometimes 70% more compared to the runner up.

Women are more social

Looking at the three biggest social networks (Facebook, Hyves, Twitter) it clearly shows that women are more engaged on social networks. More women are active, they are spending more time and viewing more pages in comparison with their male counterparts.

Social Media



shows steady growth, but still small compared to the other big players.

Google+ was introduced the 28th of June, 2011 as Google's attempt to overthrow Facebook's hegemony. Since then it has steadily increased in size and build up a decent user base. When it opened up for everybody, on the 20th of September of 2011, the traffic spiked due marketing exposure and the eagerness of the public to check it out. After this peak there was a huge drop in visits as Google failed to make people return.

Despite its growth, Google+ is not yet embedded in our heart and habits. To illustrate this; the average Google+ visitor visited the site twice in December. For Facebook this number was more than 30.

Graph: the penetration of Google+ in the panel based on weekly unique visitors



Search

Who's ready to challenge Google?

Search

Google dominates search

Market share of [Google](#) in The Netherlands versus [Bing](#), [Ask](#) and [Yahoo](#) throughout 2011.



Search

Google dominates search

Google is the most used search engine in The Netherlands by far. It has a market share of more than 95% based on the total amount of pageviews. Even for Google standards this is huge. The intensity of use of Google is also unequaled by its competition. Average time spend and pageviews viewed per visit are double, at a minimum. The complete breakdown of shares is as follows:

| | |
|--|-------|
|  | 95.8% |
|  | 2.4% |
|  | 1.6% |
|  | 0.2% |

Search is local

Less than 8% of the searches on Google in the Netherlands happen on Google.com. The rest of the pageviews on Google.com are related to other Google products (such as Maps, Mail and Google+). These services account for 85% of the pageviews on Google.com.

Most used search terms of 2011

1. hyves
2. facebook
3. marktplaats

It's Sunday

Sunday is when Google is visited most and when the most searches occur on. The visits and the searches are at its lowest on Fridays.

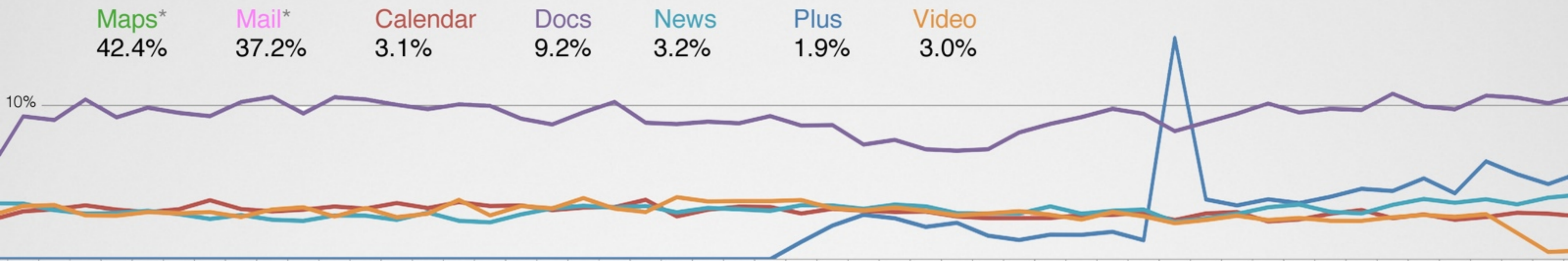
“Sunday” is also the most Googled day of the week.

Search

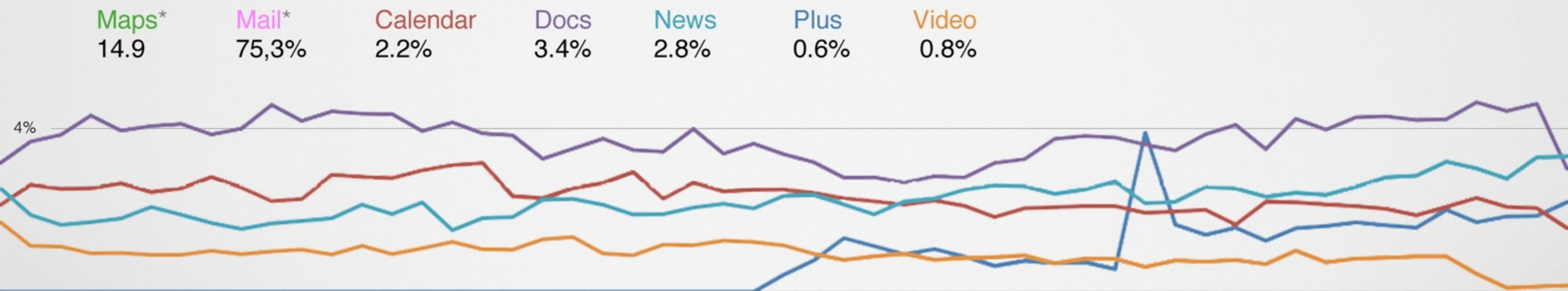
Zooming in on Google Services; Maps a surprising winner

Let's turn our attention to the other services Google provides. Here once again you see a remarkable difference between reach and intensity. Maps is most adopted by the audience, but it's lacking intensity (modest number of visits). Mail has a lower reach, but prevails in intensity. Google+ is slowly gaining momentum eventhough the number of visits per unique visitor is quite low.

Graph: Share of Google Services based on total amount of unique visitors per week



Graph: Share of Google Services based on total amount of visits per week



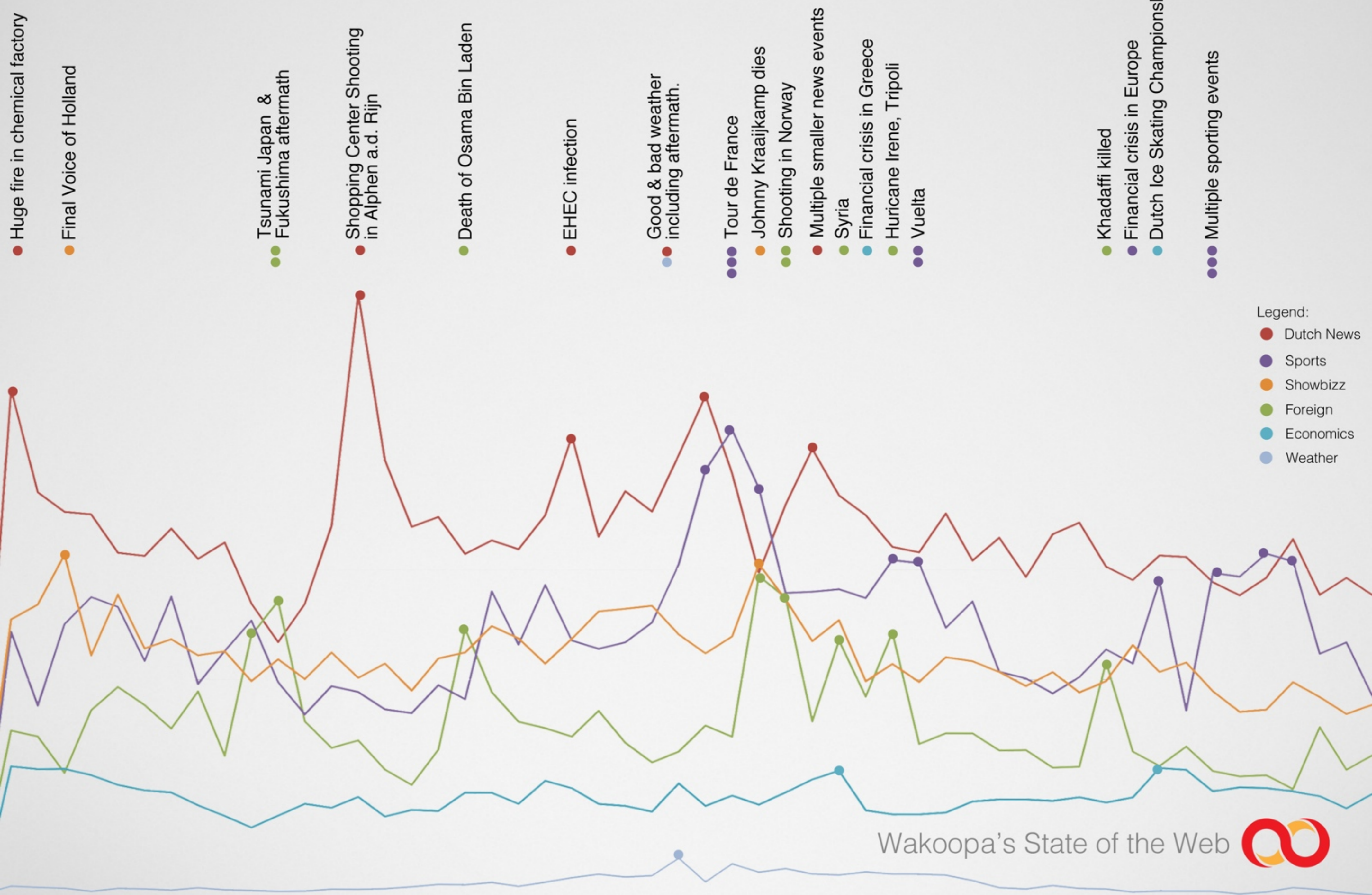
* Maps and Mail are not displayed.

News

What topics got us clicking in 2011?

News

Graph shows volume of daily unique visitors in different news categories on 7 news sites.



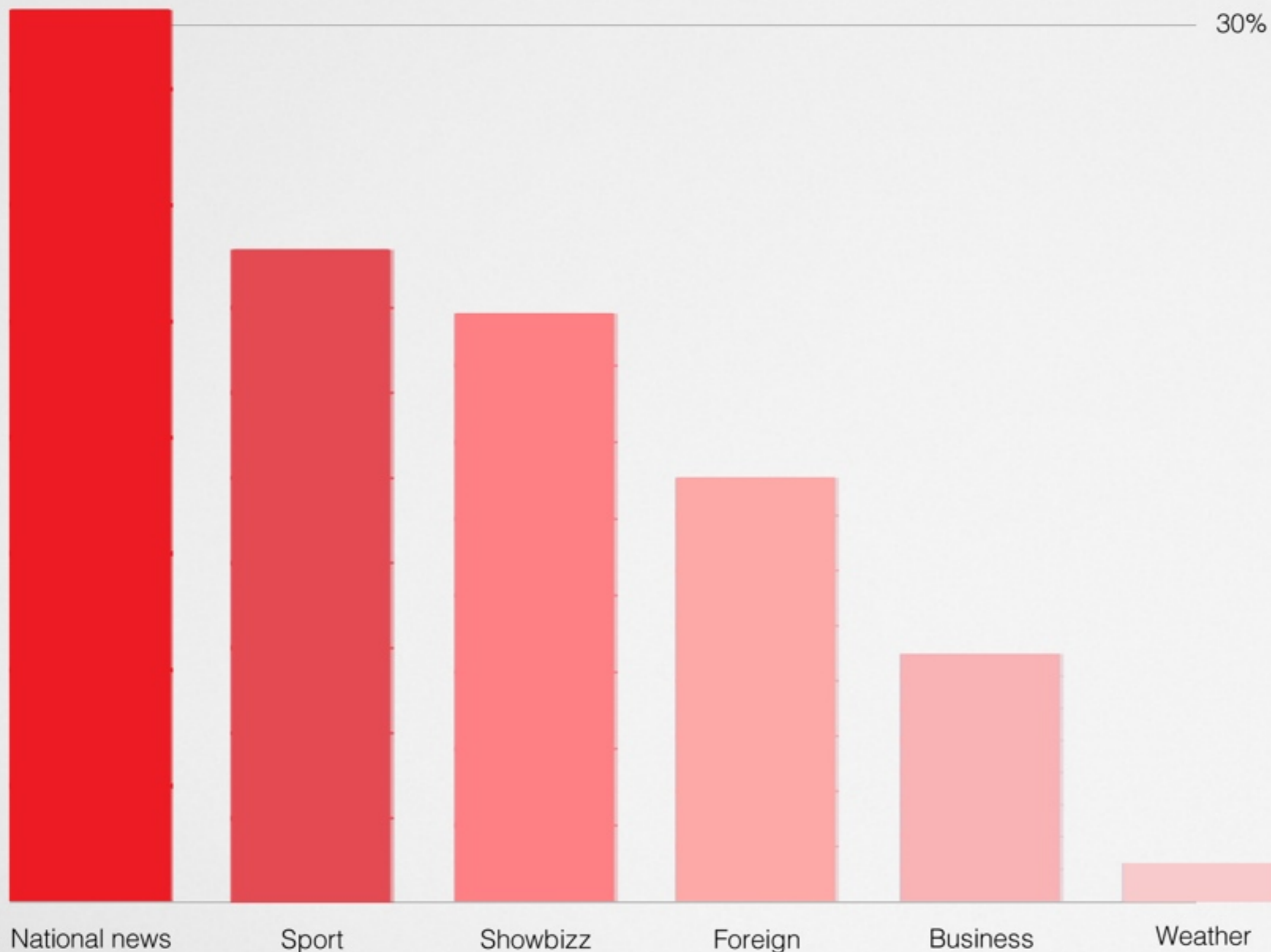
News

National news best read

Analyzing the frequency of visits for each news category leads graph shown below. National news leads the way, followed by Sports and Showbizz before Foreign news.

What's quite interesting is that the *intensity* of the visits are pretty much the same. The real difference lies in the *frequency* of the visits. Men are visiting the Sports and Economics section almost twice as much compared to their counterparts. Women are visiting the Showbizz more often. This is about 25% higher.

Graph: Share or categories based on the total amount of visits



Most news consumed on Wednesdays

The most news is consumed on Wednesday. Saturday is the slowest day of the week.

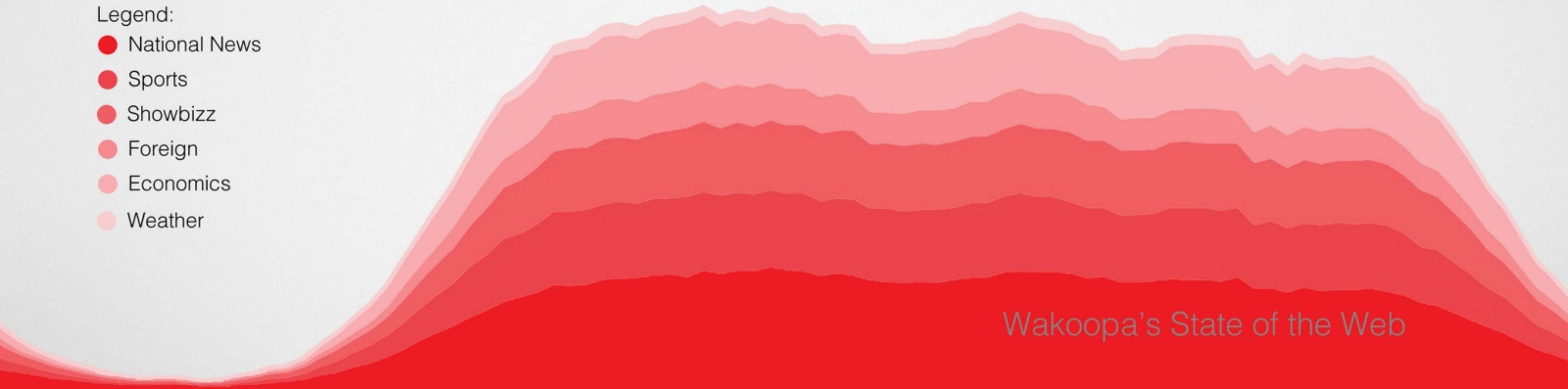
Looking at the individual categories it shows that foreign news tops on Monday, sports in the weekend (especially Sundays), while economics dips tremendously in the weekend.

News usage per day

The graph shows a breakdown of the news usage on a daily basis based on unique visitors. So this is an average day of news consumption based on a whole years data.

Legend:

- National News
- Sports
- Showbizz
- Foreign
- Economics
- Weather



Shopping

How do multinationals Amazon and H&M measure up against local industry leaders?

Shopping

amazon vs. largest local retailer

Local leads, and Amazon is playing catch-up

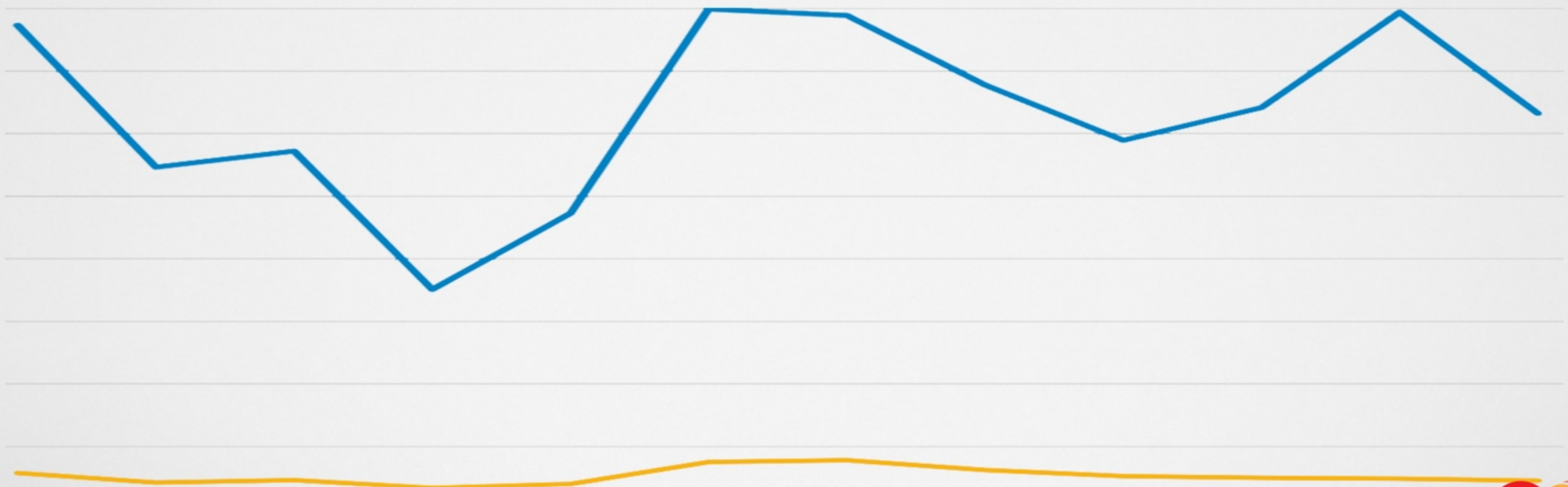
Bol.com is the largest retailer in The Netherlands and grossed €318 mln in 2010. It was founded in 1999 and has a strict focus on The Netherlands. Amazon is world's largest retailer and has no local presence in Holland. Placing an order is possible but happens on non-Dutch domains. Bol.com sees Amazon as its main threat.

The data, displayed in the graph below, clearly shows Bol.com is still the leading vendor in Dutch retail. Amazon gained traction during Spring claiming a 14% market share. This without a local presence and any significant marketing effort. However, it was unable to hold on to this and, once again, dropped under 10% share in Autumn.

Eventhough there is significant difference in reach, measured in unique visitors and pageviews, it shows that the characteristics per visit are quite similar. About equal pageviews and time is spend on each site per visit.

Legend: ● Amazon ● Local retailer: Bol.com

Traffic throughout 2011 based on monthly visits



Shopping

amazon vs. largest local retailer

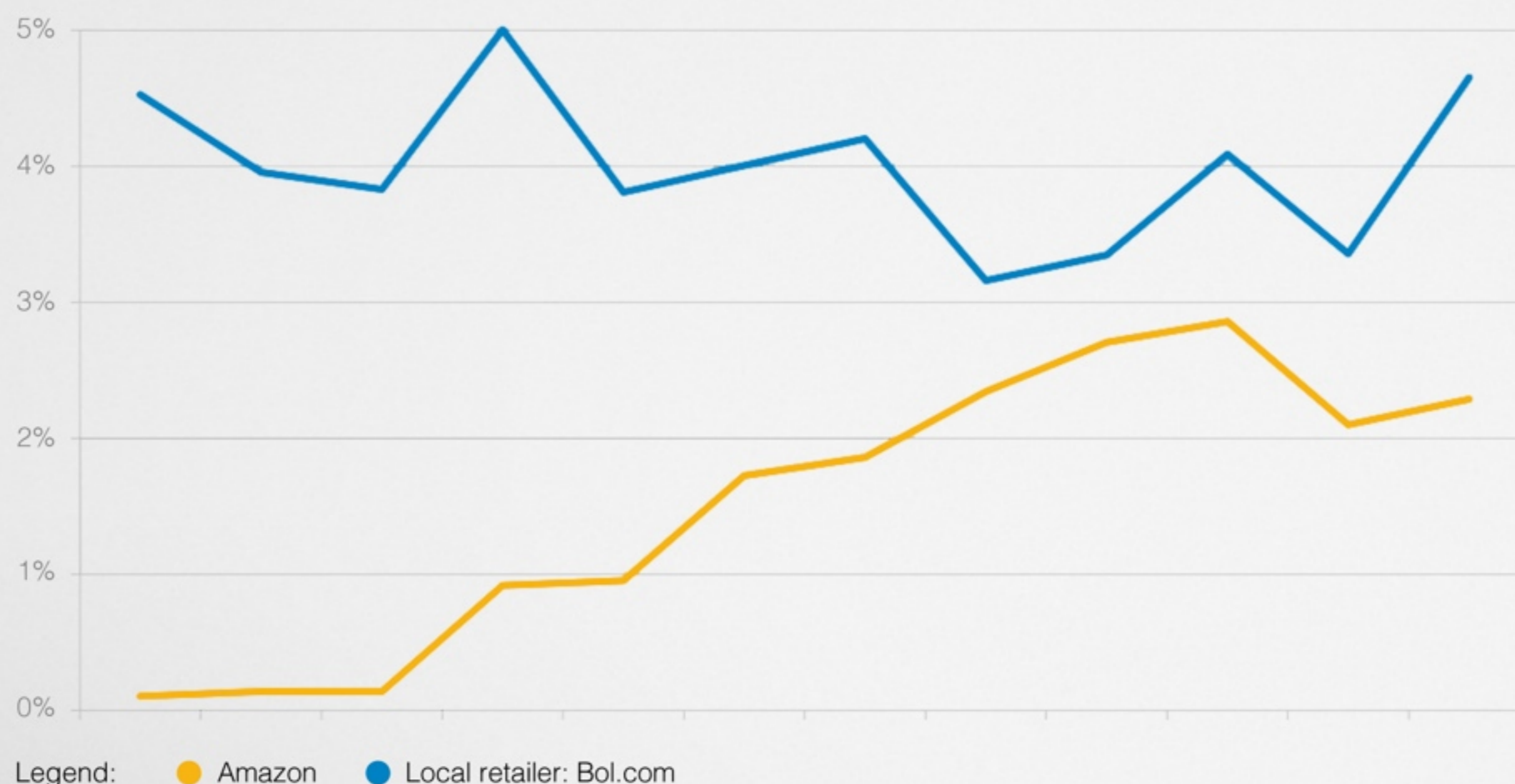
Let's dive a little deeper in the data and see what it tells us. Our technology enables us to calculate the conversion rates of Bol.com and Amazon. This clearly tells another story. One of the very obvious rise of Amazon.

In the beginning of this year the conversion of Amazon was a mere 0.2%, but this increased tremendously during the rest of 2011. If we attribute those sales to the specific domains which generated those sales we get the following breakdown:

- 48.5% is bought at Amazon.co.uk
- 25.6% at Amazon.com
- 24.6% at Amazon.de
- 1.3% at Amazon.fr

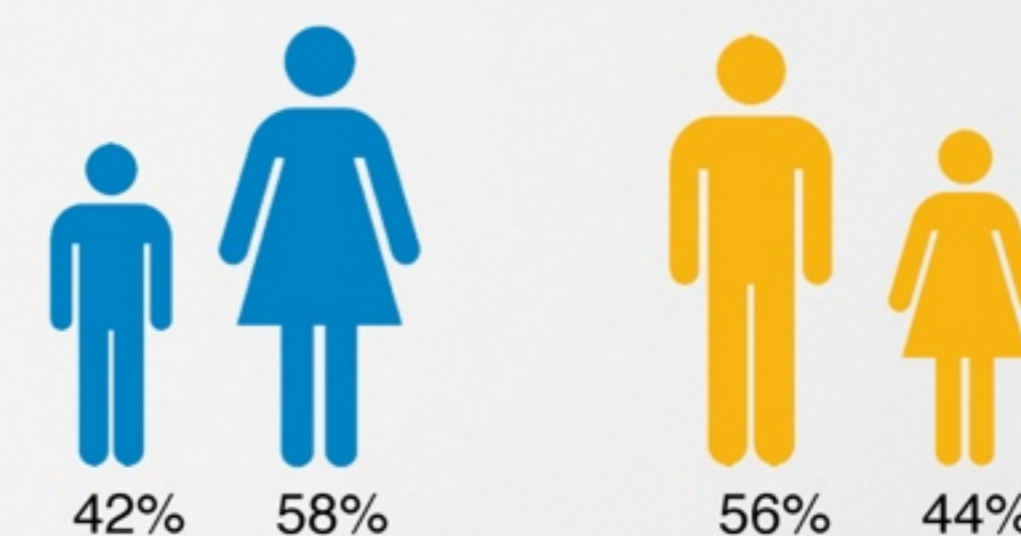
Looking at the day-to-day data you see a significant rise during the holiday season. Bol.com had a weekly conversions upto 7.6% in the weeks leading up to Christmas. This compared to Amazon which peaked at 3.4%.

Conversion throughout 2011 based on monthly conversion rates



Gender distribution of buyers

We know quite a bit about our panel. Using these properties enables you to extract more detailed insights. Here we looked at the genders of the buyers. Bol attracts more women, Amazon more men.



Shopping

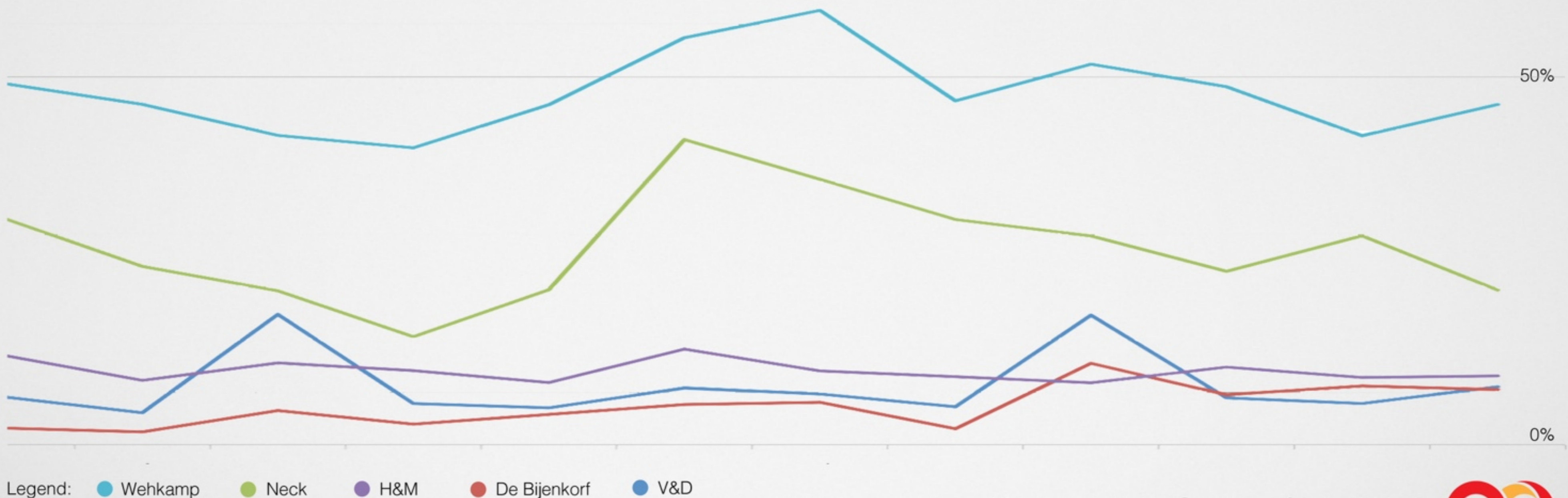
How does H&M measure up against local competition?

H&M is, of course, a brand. The local players are all retailers but highly focussed on fashion. For example, the visitors of Wehkamp spend more than 70% of their time in fashion categories. Let's see how H&M holds up in comparison with four of the top local retailers; Wehkamp, Neck, De Bijenkorf and V&D.

Wehkamp is, by far, the biggest fashion player on the Dutch market, as can be seen in the graph below. To put the size of Wehkamp in perspective; it almost as big as the others combined. The highs and lows in the graph below can be attributed to in- or decreased marketing efforts which are big influencers on traffic.

🕒 Looking at the top entries of each site gave us an interesting perspective on consumers shopping behavior. Just as in real life consumers 'go shopping', visiting multiple retailers, switching tabs and comparing offers. We measured an entry rate of about 5% on average which could be directly allocated to the competition.

Graph: Shares throughout 2011 based on the total amount of visits



Legend: ● Wehkamp ● Neck ● H&M ● De Bijenkorf ● V&D

Shopping

H&M is playing at another level

Although not the biggest; it outperforms the competitions on all other metrics.

- **Consumers stay 3 times longer on their website.**
- **They view more than 4 times as many pages.**
- **Their bounce rate is 6 times lower than the competition,**
- **And they get more than twice the referrals (12%) from social media.**

Advertising

Who were the big spenders of 2011, and where did they spend it?

Advertising






With our technology we do not only track URL's and search terms but also online. We capture every banner that is served to a consumer which has our tracker installed.


Based on our data we compiled the top domains on which ads 10 are being served, and the top 5 companies who are advertising. The total number of ads impressions we registered in 2011 was a whopping 3.881.602.674 on more than 630.000 different ads.

Top 10 domains

1. Hyves.nl
2. Live.com
3. Telegraaf.nl
4. Nu.nl
5. Startpagina.nl
6. Ad.nl
7. Buienradar.nl
8. MSN.com
9. Youtube.com
10. Tvgids.nl

Top 5 advertisers

1.  upc
2.  GROUPON
3.  zalando
4.  gsm.nl
5.  kpn

 Advertising truly is long tail. Even the biggest domain is only responsible for a mere 0,3% of the total ad impressions which are being served to the consumers.

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Thank you so much for reading our report. I hope we have provided you with insights, inspiration and ideas. Please feel free to contact me if you have any questions.

Enjoy!

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17th of January, 2012

