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Telecommunication



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Dear Readers,

Welcome to the new edition of our CEE Newsletter Telco! We have great pleasure in bringing you a fistful of interesting articles, useful information and knowledgeable insights from telecoms markets in the Central and Eastern European countries. Let us begin with an excerpt from the latest study, mapping mobile service usage across our region.

The »scissors« of mobile phone usage in CEE are closing

Recent study of mobile services usage in CEE countries reveals a clear trend towards an even penetration of mobile phones. When we conducted the first wave of the Central and Eastern European multi-country study of mobile services usage in January/February 2007, we found a great discrepancy between the percentages of mobile users in various countries. The penetration of mobile users ranged from as low as 59 % in Bulgaria to 92% in Slovenia. However, this picture has changed dramatically since then. The September/October 2008 study shows that, although the leaders in mobile telephony (Slovenia, Czech Republic, and Austria), have maintained their position, they seem to have reached the market saturation level and mobile phone penetration is not growing any further. On the other hand, the formerly underdeveloped countries (Bulgaria, Ukraine, Romania, Russia ...) have enjoyed significant growth in this field. Ukraine is the record-holder with an almost 20 % increase in the number of mobile users. Thus, while the penetration of mobile phone use in countries like Bulgaria and Romania still lags behind the leaders, the overall trend is positive and the CEE countries are likely to reach a level of mobile service usage comparable to the rest in just a few years.

[▶ read more \(pdf\)](#)

Yours sincerely

[▶](#) **Martin Mravec, GfK CEE Telecom Team Leader**

You can find further information about the findings of our studies under [▶ www.gfk.at](http://www.gfk.at) or via the links from this site to the web sites of all the GfK companies in Central and Eastern Europe. [▶ e-mail us](#)

▶ GfK Austria	▶ GfK BH	▶ GfK Hungária	▶ GfK Praha	▶ GfK Skopje	▶ GfK Slovenija
▶ GfK CR Baltic	▶ GfK Bulgaria	▶ GfK Kazakhstan	▶ GfK Romania	▶ GfK Slovakia	▶ GfK Ukraine
▶ GfK Belgrade	▶ GfK Croatia	▶ GfK Polonia	▶ GfK RUS	▶ INCOMA (CZ)	



Croatia

Exclusion of the older population from the telecommunication market in Croatia

The percentage of the population of people aged 65 years and more is increasing in Croatia, a similar trend to that found in other European countries. At the same time, the use of technology such as personal computers and computerized technology or mobile phones is becoming more and more a part of our everyday life. The elderly population could, therefore, present a sizeable market opportunity for the IT and telecommunication industry as a result of this growing share of the population. However, when a closer look is taken at the IT and telecommunications market, the marketers are still out of touch with the older population in Croatia.

[▶ read more \(pdf\)](#)

Bosnia and Herzegovina

Google is the most popular web page in B&H

Nearly one in three of the citizens of B&H over the age of 15 is an Internet user, as is shown by the results from the GfK BH Centre for Marketing Research. Two thirds of users have chosen Google as their homepage in the Internet browser they use, and this is also the page which takes first place amongst the Top 5 pages visited. Amongst the local web pages, Dernek.ba, Bihnet.ba and Posao.ba are the most visited.

[▶ read more \(pdf\)](#)



People



Mag. Robert Madas

Mag. Robert Madas has recently joined the Client Services Team at GfK Austria. He will work as Account Manager, primarily in the field of Technology Research. After finishing his studies in Commerce at the Vienna University of Economics and Business Administration he worked as Assistant Professor with Prof. Schweiger at the Advertising and Marketing Research Institute. In addition to teaching Marketing and Marketing Research, he also conducted market research projects for brands such as Skoda, Nikon and Konica Minolta. (Tel.: +43 1 71710-149)

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Czech Republic

Research among Decision-Makers (LAE-CR-2008)

The project LAE-CR-2008 is in its fifth year of ongoing behavioural research into the media usage patterns of a target group of decision-makers. As a result, it also provides an in-depth analysis of this target group.

Among the target group rank: directors, top management, top executives, entrepreneurs with at least 3 employees, independent higher specialists, qualified employees, and top executives in public administration.

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Romania

Place of telecommunication services in Romanians' life style – The corporate battle for Romanians' hearts

The Romanian telecom market is one of the most dynamic of its kind in the CEE region. Great changes started developing along with the establishment of the cable TV providers in 1994, the rise of the first mobile telephony companies (in '96 – '97), the availability of Internet technology for households and the end of the fixed telephony monopoly in 2003. Since then, the explosion of small local TV & Internet providers, takeovers, the entrance of new companies to the Romanian market, developments in the portfolio of telecom services offered by companies and the steep changes of the market shares have succeeded one another in a dazzling cascade.

[▶ read more \(pdf\)](#)



Serbia

Use of computers in Belgrade area and Serbia

The aim of this article is to reveal trends pertaining to the use of laptop and desktop computers in Belgrade and Serbia. The latest data show that laptop computers are still not as popular as desktops and those households which own a desktop are more likely to own a laptop as well.

[▶ read more \(pdf\)](#)

Slovakia

Slovaks are keen on using technological innovations

People in Slovakia seem to be attracted by new technology. Most Slovaks agree that new technology saves time and as many as one third of the people in Slovakia, most of them aged under 39, are happy to use a technological innovation sooner than others. These are some of the findings of the Lifestyle Study, which set out to explore the lifestyle of the Slovak population. GfK Slovakia decided, therefore, to put some questions to the online population, which is known to be more technologically skilled and goes online on a regular basis.

[▶ read more \(pdf\)](#)

Did You Know ...?

Russian consumers are increasingly more focused on achieving material success and status.

An overwhelming majority of Russian consumers (66%) would prefer to have more money than more time. And, if indeed Russians had more money, here are the top five things they would spend it on:

1. Buy a home
2. Travel more
3. Improve my home
4. Buy a vehicle
5. Save for my retirement/ children's education

While success/status-driven items are tops among Russian consumers, the second most important value in Russia is Health and Fitness. It is, however, aspirational in nature, as only 11% of Russians are very interested in the topic of Health and Fitness. In other words, they understand the importance of 'healthy behaviour' but have a problem with following through on them.

Source: GfK Roper Reports® Worldwide, 2008

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Slovenia

Overview of the Slovene market for telecommunications 2008

We are examining the events in the field of mobile telephony, computers, Internet, stationary (fixed) telephony, television and telecommunications expenses with the Tel.com Monitor research, representative for Slovene population. These data are an important indicator of the efficiency of marketing activities and the foundation for guidelines for planning future strategies.

Let us look at some other interesting findings of the survey Tel.com Monitor.

[▶ read more \(pdf\)](#)



Ukraine

Internet in Ukraine: gradual increase

According to the results obtained in the first three quarters of 2008, the share of regular Internet users' constitutes 15 % of the Ukrainian population aged 16 and over. This indicator has remained stable since 2007, undergoing only slight change. Regular users most frequently use the Internet as a means of communication, a source of information (education, news, services and products) and entertainment (downloading and listening to music, surfing entertainment/sports websites). This data is shown in the regular telecommunications market research carried out by GfK Ukraine.

[▶ read more \(pdf\)](#)

Event

Getting closer to consumer needs

Bratislava was the hosting city for the GfK CEE Technology Conference 2008, which took place at the Crowne Plaza Hotel on November 25th, 2008. It was an international case studies-driven event designed for managers and experts working mainly in telecom, IT and other related industries. It offered more than 10 case studies providing best practices in managing customer experience programmes, optimization of product portfolio and measurement of communication effectiveness. Members from the GfK CEE offices presented their interesting findings together with their clients from leading Telco companies in the region. It was an excellent opportunity for networking with their industry peers and discussing the hottest topics and key issues arising in the CEE region.

As Richard Jameson, the Global Technology Sector Leader from GfK Custom Research UK, said: "Technology innovation is everywhere, but technology companies need to exploit innovation in a way that makes a difference to consumers." He presented specific examples of how to build customer insights into the early stages of product and service design and also showed how to use new techniques and technologies to engage with consumers for fast feedback. Industry specialists presented specific case studies – for example, what the deprivation of a mobile phone means in practice and how people behave after one week without their own mobile phone. There were also discussions about customer experience and measuring communications performance and impact. Delegates heard what is important when it comes to customer care and what factors affect the decision to buy a mobile phone.

[▶ pictures and contact \(pdf\)](#)

Comments

If you would like to make any comments about our Newsletter or if any other colleagues in your company are interested in our E-Mail News please let us know.

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