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Telecommunication

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Dear Readers,

The crisis: no longer a hot topic, but is it over? And the burning question: what now? The effects on industry in our region over the last 2 years have been mixed and now we must understand how it has transformed the customer. Now we have information about customer decision-making, explaining changes in customer satisfaction and loyalty and identifying new sub-segments.

In telecoms, too, not all innovations and initiatives succeeded. Up-selling, marketing budget cuts, assuming customers only react to lower prices, emphasis on »value for money« – were they right or wrong? Sales networks must be optimised to meet customer needs and expectations. Losing customers is easy: poor customer service, long waits, too complex offers are all pivotal in shaping customer experience, triggering a customer to switch.

Here are articles about all of this: see the effect of »value for money«, what the Slovakian customer thinks of the sales process, how customers' views of the price/value relationship and expectations of companies have changed and much more. Today's new maxim: less is more, creative detail trumps standard offer. Interest shown in your customer will pay interest.

I hope you enjoy this issue and find something of interest and relevance to your company,

Yours sincerely

▶ **Ing. Martin Mravec, Managing Director GfK Slovakia**
GfK CEEMEA Business & Technology Team Leader

You can find further information about the findings of our studies under ▶ 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](#)

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CEE Region

Wikipedia is more credible for Internet users than the daily newspapers

Almost 30 percent of the population in Austria and Slovenia and 40 percent in Croatia are already checking on their contacts via Facebook and other social networks whilst they are still out and about. As a rule, younger persons log in several times a day and use the internet as their primary source of information. As a result, Web 2.0 applications – especially Facebook and Wikipedia – are increasingly pushing their way into all sectors of life. This is the conclusion drawn from the study »Information behaviour patterns, Web 2.0 and the effects on society« which was carried out by GfK Austria for the Telekom Austria Group in August in Austria, Slovenia and Croatia with 500 internet users in each country.

[▶ read more \(pdf\)](#)



Czech Republic

**The telecommunications industry in the Czech Republic
Mobile Network Operators: Balanced Competition in a Saturated Market Optimises Prices**

At present, there are nearly 1.3 active SIM cards per citizen of the Czech Republic, and the ratio has not changed much over the last twelve months. With a rate of almost 130%, the Czech Republic is among the countries with the highest mobile phone penetration in the world. For a long time, there have been three big players in the Czech market: T-mobile, Vodafone and Telefónica O2. Great investment in communication is typical of all of them.

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Macedonia

**Slight increase in the use of
Telecommunication Services in Macedonia**

The global trend for increased use of telecommunication services is also to be seen in Macedonia and comparison of the data for different years shows that there is stable growth. Every year, GfK Skopje conducts an omnibus study on a representative sample in order to identify these trends. The study is conducted face to face with a sample of 1000 respondents.

Comparisons made between 2008 and 2010 show that there has been an increase in the use of mobile telephones. The same trend is detected in the comparison between two different waves from 2010. There is a very small, but stable, increase in the use of two or more handsets.

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Poland

ZOOM research

ZOOM is a research programme that was set up in 2010 by Telekomunikacja Polska (Polish Telecommunications) (hereinafter TP) and PTK Centertel.

The Zoom research project is aimed at determining the dimensions and producing a picture of the scale and value of the B2C and B2B markets with regard to telecommunications solutions: landline telephone services, mobile telephone connection services, the Internet, subscription-based television, package services, and other services specific to the B2B market (TD, LL and ICT).

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Shortcut

UK

TechTalk – Industry trends and insights

TechTalk covers the current trends, issues and market developments affecting technology organisations today.

Our latest data on market trends and technology consumer/business behaviour is enriched with our sector experts' interpretation of what these mean for you, giving you professional food for thought on the upcoming questions that you may be facing.

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Romania

The mobile phone: the most popular means of communication with those who have left the country

More than 45 % of Romanians have relatives, close friends or acquaintances who have gone abroad for long periods, according to the GfK Omnibus. Of these, half keep in touch with people who have left the country every week, contacting them once or several times, whilst 12 % maintain contact once every two weeks, 21 % once a month, 16 % less often than once a month and only 2 % state that they do not keep in touch at all with the people who have gone abroad.

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Serbia

The Social Network Facebook in Serbia

43 % of Serbian citizens use the internet and, so far, 62 % of the internet users have opened their own account on the social network Facebook. As many as 68 % of our respondents who have opened Facebook accounts say they login to the webpage every day and 50 % of them use it a number of times a day.

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Flashing News

Slovakia

Customers in Bratislava are more demanding when it comes to staff and services

Slovak consumers are most easily annoyed by unwilling and indifferent staff. Unprofessional behaviour – lack of willingness, incompetence or peevishness and unfriendliness, were all mentioned by as many as 69 percent of the people who were polled regarding what irritated them most when doing their shopping. People living in Bratislava appear to be much more sensitive to this phenomenon as more than 85 percent of the respondents from Bratislava and its surrounding area mentioned this type of behaviour by staff in stores.

These are some of the findings of GfK Loyalty Report Slovakia, a study conducted by GfK Slovakia in September 2010 on a sample comprising 810 respondents.

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Slovakia

People in Slovakia appreciate companies that care about corporate social responsibility

When ›corporate philanthropy‹ or ›corporate social responsibility‹ are mentioned, people most often recall companies doing business in the telecom sector and the energy industry. Other companies often associated with CSR (Corporate Social Responsibility) come from the media, banking and IT sectors.



Women tend to recall cosmetic companies while men think of heavy and light industry in general. More than one third of respondents were not able to quote any specific company which would purposefully invest part of its profit in socially responsible projects. Another 15 percent associated mainly third-sector subjects with these activities. These are some of the findings of an online survey conducted by GfK Slovakia in June 2010 on a sample of 1010 respondents aged 15 to 60.

[▶ read more \(pdf\)](#)

Marketing by Word of Mouth is a powerful tool – as many as six out of ten Slovaks listen to advice from their friends

According to Slovak customers, the greatest weakness of Slovak companies which has a major impact on the customer experience applies mainly to staff and to the quality of goods and services compared to their price. These are the factors which stimulate customer dissatisfaction the most. Most individuals tend to share their negative experiences with other people around them and, in this >>



respect, the value of Word of Mouth is really high since as many as six out of ten people in Slovakia admit to being influenced by the advice given to them by their friends and acquaintances. These are some of the findings taken from the survey entitled Customer Experience Report Slovakia 2010 conducted by GfK Slovakia in March this year on a sample comprising 810 respondents.

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Slovenia

Trends in the use of the Internet in Slovenia

Who can imagine life without the internet? We use it at home, at school, at work and even more on our mobile phones and laptops. The internet is not just a global data base: nowadays we use it to maintain and establish social contacts, shopping etc. We therefore decided to check

what the trends in internet usage in Slovenia are like. The survey was conducted in September 2010 with a representative sample of the population of the Republic Slovenia aged from 15 to 75 years.

[▶ read more \(pdf\)](#)

Ukraine

Five trends in the Ukrainian Telecom market in the crisis years

General market overview

The Ukrainian telecom market has been developing rapidly during the last few years. According to GfK Ukraine survey data, in 2007 only 64 % of Ukrainians aged 16+ used mobile phones compared to 80 % in 2010. The penetration of mobile services assessed by the number of active SIM-cards has been stable in recent years and has remained close to 120 %, showing that mobile communications has become a common service available to everyone.

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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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