



## Online Research - GfK Romania

GfK. Growth from Knowledge

# @ Online research

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## Our world is changing!

53% from all the interviews performed in GfK are online!

### Agenda:

- 1 Internet access in Romania
- 2 Advantages of online research
- 3 The online questionnaire
- 4 Online research solutions provided by GfK

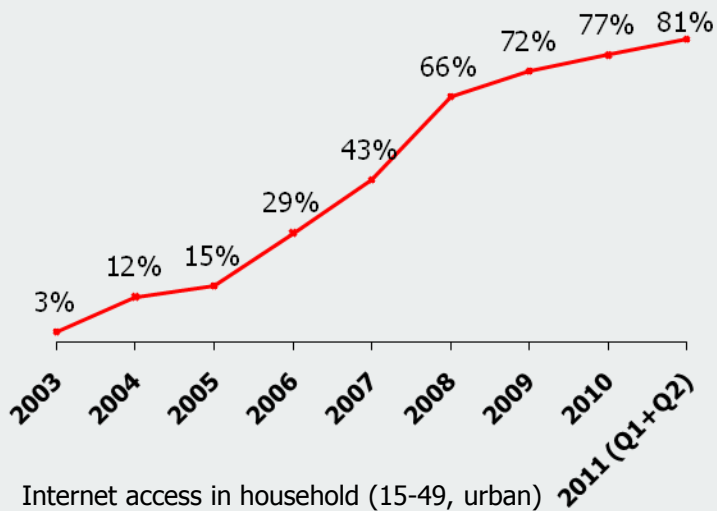


## Internet access in Romania

Why now is time for online research?

# The Internet access in Romania

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The internet penetration rate in Romania **is growing fast.**

In urban areas, for the target 15-49 y.o., urban, often approached by marketing research, we have an internet penetration rate in households of **81%**!

**Now we can provide statistically significant studies for the internet users in urban areas**

Population - Romania	Population size ('000)	With Internet access in HH (%)	With fixed telephone in the HH (%)
Total N=21.499	21.499	51	45
urban	12.125	67	54
rural	9.374	31	33
15-49 y.o.	13.099	65	41
15-49 y.o., urban	8.077	81	48
15-49 y.o., large cities	3.006	91	57

Internet access in household  
Source: GfK Internet Monitor

# The Internet access in Romania

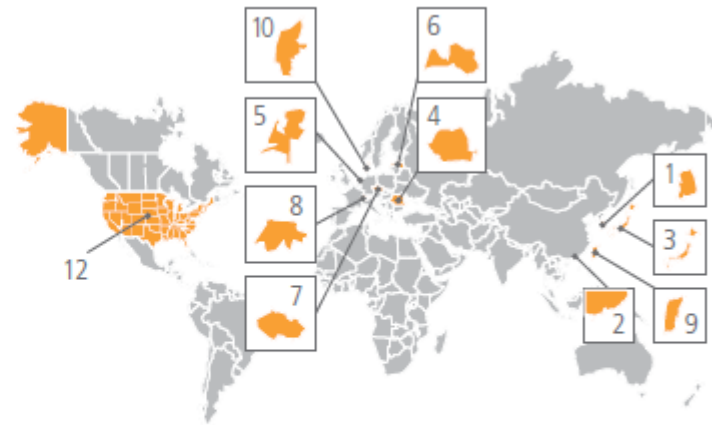
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And an interesting fact...

**We are the 4<sup>th</sup> country in the world regarding internet access speed**

**... so online we can present rich multimedia content to our respondents**

Country/Region	Q3 '10 Avg. Mbps	QoQ Change	YoY Change
– Global	1.9	8.2%	14%
1 South Korea	14	-15%	-3.2%
2 Hong Kong	9.2	7.5%	19%
3 Japan	8.5	5.3%	6.8%
4 Romania	7.0	2.9%	12%
5 Netherlands	6.3	-2.7%	14%
6 Latvia	6.0	-3.4%	27%
7 Czech Republic	5.4	2.2%	4.8%
8 Switzerland	5.3	5.2%	9.9%
9 Taiwan	5.0	24%	9.9%
10 Denmark	5.0	-2.6%	5.9%
...			
12 United States	5.0	8.6%	11%



**Figure 4:** Average Measured Connection Speed by Country/Region

Source: Akamai: The State of the Internet 3<sup>rd</sup> quarter 2010.

# Characteristics of the Internet users in Romania



- Two-thirds of Internet users in Romania live in large and medium cities
- They are young people, from 18 to 44 y.o., educated (at least secondary education) and with higher incomes

- They use almost daily the Internet, mainly at home
- The segment with a great consumption potential that is targeted by most of the producers and service providers
- The segment which has always something to say, open to novelty



## Advantages of online research

# Why online research?

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## Online fieldwork has **unique advantages** one will not find in other methods:

- ✓ **Very fast data gathering:** 3-4 days, not depending on sample size
- ✓ **Better research organization,** all the data is gathered in the same place, without manual input
- ✓ **Good geographic coverage,** persons from different regions (or different countries) can participate to the research in the same time
- ✓ It's **easier to reach online** very busy persons, persons on managerial positions or specialists
- ✓ The **most suitable technique** for "shocking", tabooed subject matter where social pressure can influence respondents' answers
- ✓ Possible to **use all stimulating materials** – sounds and music, pictures, movies etc.
- ✓ **Interview anytime, anywhere** - respondent chooses the time and place when he/she will fill-in questionnaire
- ✓ Having **field status in a real-time**
- ✓ **No interviewer errors,** the questionnaire is self administered
- ✓ And besides, online questionnaire is **always attractive** for respondent so he/she is more willing to complete it than phone or face-to-face interview. It increases research quality

# What can be researched online

Online methodology **can and should be** used in all types of researches:

- ✓ Usage & attitudes survey, including segmentation
- ✓ Satisfaction & loyalty measurement (customers and employees)
- ✓ Pre and post-tests of advertisements (for any support media – print, tv, radio)
- ✓ TV pilot test (a new show or format can be tested before releasing)
- ✓ Products and prices researches, shelf and package test
- ✓ Monitoring market performance
- ✓ Optimizing a website (evaluate the web content/ structure, Web Ad Monitor)

And all you can imagine !

as qualitative, quantitative and specific online research



The online questionnaire  
Why is it more attractive?

GfK

Imi puteti spune va rog cat de des consumati urmatoarele bauturi?

Indicati frecventa de consum pentru fiecare dintre categoriile de mai jos.

	Cel putin o data pe zi	4-6 ori pe saptamana	2-3 ori pe saptamana	0 data pe saptamana	De 2 - 3 ori in ultima luna	0 data in ultima luna	Mai rar
Bauturi spirtoase	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bauturi energizante	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sampanie/ Cidru	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bauturi pentru sportivi	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Raspuns(uri)Lipsa.</b>							
Apa minerala carbogazoasa	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Vin	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ice tea	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bauturi racoritoare carbogazoase (Cola)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bere	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Raspuns(uri)Lipsa.</b>							
Bauturi racoritoare carbogazoase (altele decat Cola)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Apa minerala plata	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sucuri de fructe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Raspuns(uri)Lipsa.</b>							

Anteriorul

Urmatorul

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GfK

Pe care dintre aceste site-uri le preferati in general?

Va rugam sa alegeti cel mult 3 site-uri, pe care sa le notati cu:

1=site-ul pe care il preferati cel mai mult

2=al doilea ca preferinta

3=cea de-a treia preferinta.

	<input type="text" value="3"/>
	<input type="text" value="2"/>
	<input type="text" value="0"/>
	<input type="text" value="0"/>
	<input type="text" value="0"/>
	<input type="text" value="1"/>
	<input type="text" value="0"/>

Anteriorul

Urmatorul

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GfK

**GfK**



Recunoasteti persoana din imagine?



**Andreea Raicu**

Da  
 Nu

Cat timp (in ore) ati petrecut in total pe site-ul Mobile in ultimele 6 luni?

Ore

Si cat timp (in minute) petreceti la o singura vizita pe site-ul Mobile?

Minute

Care este motivul principal pentru care intrati pe site-ul Mobile?

- Nu doriti sa cumparati/ vindeti o masina, dar va face placere sa urmariti anunturi pentru modelele care va plac
- Nu doriti sa cumparati/ vindeti o masina, dar sunteti interesat(a) de piata masinilor second-hand in general
- Sunteti interesat(a) de masini in general
- Nu aveti un motiv anume pentru care intrati pe Mobile, doriti doar sa treaca timpul
- Doriti sa cumparati/ vindeti o masina in prezent
- Doriti sa cumparati/ vindeti o masina in viitorul apropiat
- Nu doriti sa cumparati/ vindeti o masina, dar vreti sa stiti pretul masinilor asemanatoare cu cea pe care o aveti
- Altele. Specificati ( bifati intai in casuta din stanga si apoi notati in casuta alaturata):



Online research solutions  
provided by GfK

# What can be researched online

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## Online we can provide:

- ✓ Representative samples on various targets – **in askGfK Online Panel**

## But also:

- ✓ Customers' researches – from email databases of the client
- ✓ Employees' researches – from company email databases
- ✓ Real time sampling (pop-up on websites)

# AskGfK Online Research Panel - Romania

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- ✓ More than 23,000 members and over 60.000 interviews from 2010 till present

## We provide a high quality panel:

- ✓ 55% of the members are **recruited off-line** during face-to-face or telephone interviews **so we have verified their identity**
- ✓ **Identification procedures** are constantly used to remove fraudulent respondents from the panel
- ✓ **High feasibility** with an average response rate of **50-60%**
- ✓ The AskGfK respondents were recruited following **a double-opt-in process**
- ✓ Our panel is developed in order to provide representative samples based on sex, age, education, historical region and urbanization degree
- ✓ The online panel works in terms of strict confidentiality and security of the members' personal data

Homepage: [www.askgfk.ro](http://www.askgfk.ro)

Population: Internet users, 15 - 55 y.o.

## Online research experience in Romania **on fields/ targets**

We had carried out online surveys for clients from different fields:

- FMCG – consumers of energy drinks, noncarbonated drinks, body care products, premium beer
- Healthcare - mothers with children 0-7 months; women who got pregnant or intend to have a child, persons with digestive problems
- Financial - Internet Banking users and no rejecters of investment products
- Financial - employee satisfaction
- Telecommunication - BtoB and BtoC surveys
- Airlines – people who traveled abroad in 12PM
- GfK Celebrity Monitor (3 waves)
- Social
- Consultancy - people with driving license and intention for buying/ selling a car



# Online research experience in Romania **on research types**

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- Usage & Attitudes
- Brand image
- Customer satisfaction
- Concept test and product potential
- Copy test (pre-evaluation of TV ads)
- Employee satisfaction
- Price studies
- GfK Celebrity Monitor (3 waves)
- Website usability research

# How we approach the risks related to online research

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## **Client: how do I know the respondent is who he says he is?**

Good question. In GfK we have a different approach in building the online panel. More than 55% from our panel is build from face to face (offline) interviews. Because we met and talked to our panelists, we are sure about their identity.

For all the panelists, we double check their socio-demographic information from every questionnaire they complete with the data from their official registration. Those that don't provide coherent answers are removed from the panel.

## **Client: how do I know the sample is representative?**

In GfK we have build our panel in order to reach representatives on gender, age, education, city size and region. For this, we put a great accent on offline recruiting (we reach all country regions) and targeted recruiting campaigns.

The sample is representative for the internet user. The higher the internet penetration in a country, the more you can expand the conclusion of the studies to the whole population. In Romania the internet already has a good penetration rate in urban regions, so for the moment, online research is best recommended for studying urban residents.

## **Client: I don't trust the answers a person gives to an online questionnaire!**

In GfK we have developed algorithms for identifying the patterns of a person that is answering a questionnaire without reading the questions. These persons are removed from the sample and from the pannel.

# Thank you!

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