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## Telecommunication



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## Dear Readers,

The impact of the crisis on the individual economies of various countries around the world differs substantially when looking at specific industries as well as in the regional context.

It would, no doubt, be easy to identify areas where the year-on-year decline is even higher than 40 % but, on the other hand, there are segments which so far have been affected to only a minimal extent by the crisis. As a matter of interest, I would like to share with you the findings of a survey recently conducted in Slovakia, a small country at the heart of Europe with a very open economy, which in recent years has enjoyed a great deal of foreign direct investment. This country was typical of extremely powerful growth, if not a boom, in a number of sectors, especially between 2006 and 2008. Today, it is facing a drastic impact of the crisis on most segments of its economy. Here we describe an example of how the crisis has affected the thinking of Slovak consumers from the point of view of various aspects of their expenditure, including telecommunications and the Internet. [▶ chart \(pdf\)](#)

We may assume that similar considerations would be characteristic for other countries too – whilst also taking into account certain regional specifics and variations.

The latest issue of our GfK Newsletter brings you highly interesting reading on various topics and issues associated with the telecommunications segment.

All the best,  
Martin Mravec

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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](#)

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# Austria

## Trends in times of crisis: What the consumers expect now

The financial crisis is casting its shadow over many countries of the world. Globally, the consumers are reacting to the changes, which in some cases are very real and cutting, which have arisen as a result of the crisis. In global terms, 84 % of the consumers say that they have had to make savings of a wide range of types as a result of the crisis. Popular savings measures are to be identified in the area of visits to restaurants or habits of heating in their homes. In the CEE area the Hungarians feel themselves to have been particularly hard hit. Only for 28 % of them has the crisis had no effect on their income whereas in Austria the comparable figure is 68 % – a notable difference. This is the framework within which the technology branch has had to operate in 2009.

[▶ read more \(pdf\)](#)

# Egypt

## Trends in the Egyptian Telecommunications Market

### Mobile Market Evolution in Egypt

The aim of this article is to demonstrate the developing trends in the mobile market in Egypt.

Mobile services were first introduced to the Egyptian market in 1998 when Mobinil, a partnership between Orascom Telecom and a couple of international companies, entered the market and launched the first private-sector service. Another mobile operator, Click GSM, which later changed its name to Vodafone Egypt, launched a second network soon after. It is worth mentioning that the



introduction of these 2 companies contributed a great deal to the Egyptian economy as a whole, as they created more than 5,000 direct jobs and generated some 15,000 indirect jobs as well as acting as a main driver of the Egyptian Stock exchange not only at a local level but also by attracting FDI into Egypt. Somewhat later, in 2006, ...

[▶ read more \(pdf\)](#)

# Macedonia

## Stable Growth of Internet Usage in Macedonia

The growth of internet usage in Macedonia has been stable over the past year. According to the results from the GfK 2009 omnibus study, 52 % of population aged 15+ years in Macedonia use the internet. Compared to 2008, the internet penetration has increased slightly, by 2 percentage points.

Although women use the internet to a greater extent than they did in 2008, the gap between men and women with regard to internet usage remains, with men still using the internet more than women do. Across the age segments, it can be seen that there has been a significant increase in the number of internet users amongst Macedonian citizens aged between 25 and 34 years as well as amongst the 35 to 44 year-olds.

[▶ read more \(pdf\)](#)

# Poland

## The Polish online society

Usage of the internet in Poland has crossed a threshold. One of the important consequences for the market research industry is that it has become a justifiable tool for market and social research.

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GfK Polonia provides a valuable measure of this phenomenon. Since the beginning of 2009 we have been exploring internet penetration and usage in the form of a face-to-face omnibus survey.

Every month we ask a representative sample of 1,000 respondents nationwide about their access to the net and the way in which they use it.

The results are stunning: in 2009, in the population of 16 to 75 year-olds, internet usage exceeded the penetration of fixed line home phones. The supremacy of the internet is even more distinct amongst the younger part of the population. We are definitely able to achieve better representativity online than in a CATI omnibus survey when interviewing persons under the age of 40 years.

[▶ read more \(pdf\)](#)

## Romania

### Vital Functions of the Mobile Phone in Romania

GfK Romania was curious to find out which are the activities that would suffer most from a temporary lack of having the use of a mobile phone amongst our fellow citizens. The idea started a year ago, when our colleagues from a neighbouring country tested the importance of mobile phones in people's daily life – through an ingenious experiment. The experiment consisted of mobile phone deprivation for different socio-demographic categories of people and the examination of the effects this had upon mobile phone users. We used the Omnibus to ask people what functions of the mobile phone, apart from voice calls and text messaging, they use most and how often they employ these functions. In this way we found out that the mobile phone is used with different frequencies depending on the age of the user, with significant differences to be found for older persons.

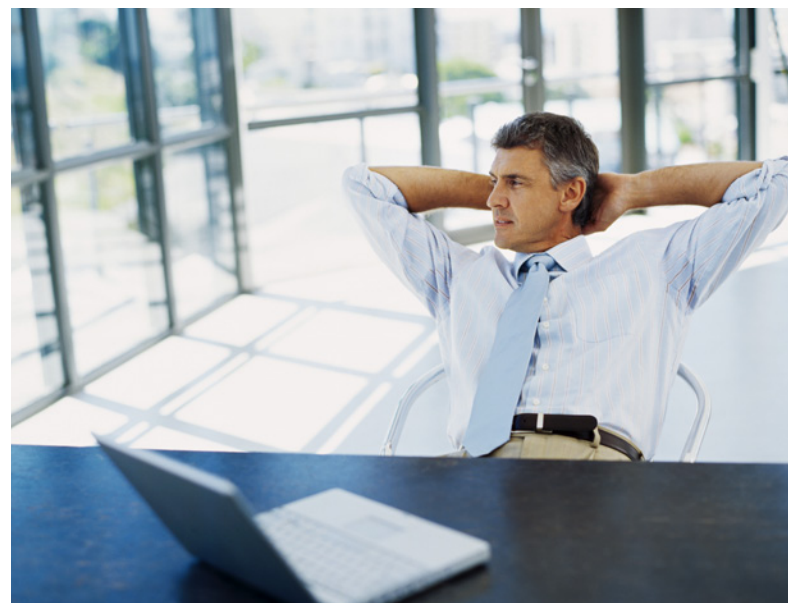
[▶ read more \(pdf\)](#)

### GfK launches first market research project in Second Life

GfK Romania is the first local market research institute to launch a research project on Virtual Bucharest, on the Second Life social networking platform. GfK Romania has implemented this first focus group in order to explore the opinions, attitudes, motivations, expectations and lifestyle among the users of the Second Life platform.

Virtual Bucharest is a three-dimensional virtual replica of the city in the virtual world and aims to gather the Romanian community within its confines. Already, large international companies have developed interesting marketing actions in this environment - conferences, live concerts, product launches and live competitions.

[▶ read more \(pdf\)](#)



## Russia

### Russia online

#### Internet is one of the fastest growing industries in Russia

Over the last 10 years, the internet in Russia has been transformed from a technology for advanced trend-setters to an inevitable part of day-to-day life for the average Russian. We cannot imagine modern life without charts, social networks, e-mails, online shopping etc. And this market shows an incredible growth rate: there has been a 30 times increase in in-home access to the internet in the period from 2000 to 2009 (from 1 % to 30 %). Its popularity has not only grown in large cities but also in small towns and even the rural areas: the share of households having in-home internet access in towns with a population of less than 100,000 has increased by a factor of 3 since 2002.

[▶ read more \(pdf\)](#)



## Serbia

### Private mobile phone usage in Serbia

Have you ever thought about life before and after mobile phones appeared in our lives? Can you imagine your everyday life without that small device? Has the mobile phone improved our lives in some way or is it just one more unnecessary item in our daily budget? All those questions may come to mind when we look at the data reported in the April wave of the Omnibus survey. Within the Omnibus survey conducted by GfK Belgrade in July of 2008 and again in April this year there was a special section dedicated to mobile phone usage. According to the results reported in this survey, it seems that the mobile phone is definitely not a luxury item in Serbia. In fact, more than 83.7 % of people aged 15+ possess and actively use a mobile phone for private purposes whilst some of them (16 %) possess two mobile phones, bringing us to a total number of almost 5 million mobile phone users.

[▶ read more \(pdf\)](#)

## Slovakia

### Phone calls still the most preferred type of communication

The most preferred way of contacting a friend or an acquaintance continues to be over the phone. As many as 85 percent reach for their phones when they want to get in touch with their friends. However, this established means of communication is increasingly rivalled by the Internet, which provides a full range of communication channels, from e-mail, chat, and messages all the way to social networks or online calls and web cameras. These are some of the findings of the September online survey conducted by GfK Slovakia on a sample comprising 528 respondents aged 15 to 50.

Even though phone calls represent the clear leader in the basket of the most preferred ways of communication, modern forms of communication are tightening the gap

and coming more and more to the forefront. Online social networks have recently become one of the most significant means of communication in Slovakia.

[▶ read more \(pdf\)](#)

## Ukraine

### Internet connection at home remains a privilege for youth living in high-rise buildings in major Ukrainian cities

Whilst in 3Q 2009, 32 % of Ukrainian households had a desktop computer or laptop, only half of them had an internet connection at home. Amongst home users, 16 % had to use a mobile connection for internet access and 7% still use slow and unstable dial-up connection. Usage of such inconvenient and expensive ways of connection shows that wired broadband connection is still unavailable for major groups of customers.



This problem is most typical of Ukrainian villages. Despite the prevailing perception of extreme poverty in Ukrainian villages, 20 % of rural households have a computer, but only a quarter of them (5 % of total) have access to the internet. 36 % of such households have to rely on a mobile operator network and 19% use slow dial-up for Internet connection.

[▶ read more \(pdf\)](#)

## 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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