

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.

This survey incorporated several areas of telecommunications, including access to and the use of the Internet among others. As expected, the share of people using the Internet increased by almost 6% compared to the previous year's survey, while Internet penetration (share of households with Internet access) increased by 10%. Compared to other countries of the European Union, Slovenians may be proud to count themselves amongst the Internet "trained" citizens, with the top comprising the Northern European countries, Switzerland, Austria and the Netherlands (Source: GfK Austria 2007). It is also interesting to know why Slovenians use the Internet. The five most common reasons are for e-mailing, sourcing information for work and study (school), searching for information for fun and what to do in leisure time, browsing the Internet for no particular reason ("killing time") and for the downloading of audio and/or video files. Today's youth is quite literally growing up with the computer and the Internet – that is obvious even just by listening to an everyday conversation and it is clearly reflected in the socio-demographic structure of the Internet users. We can say the Internet distribution amongst young people aged between 15 and 19 is 100%, and it gradually drops with increasing age. Most prevalent among Internet users are employed persons, men, singles and people with higher education.

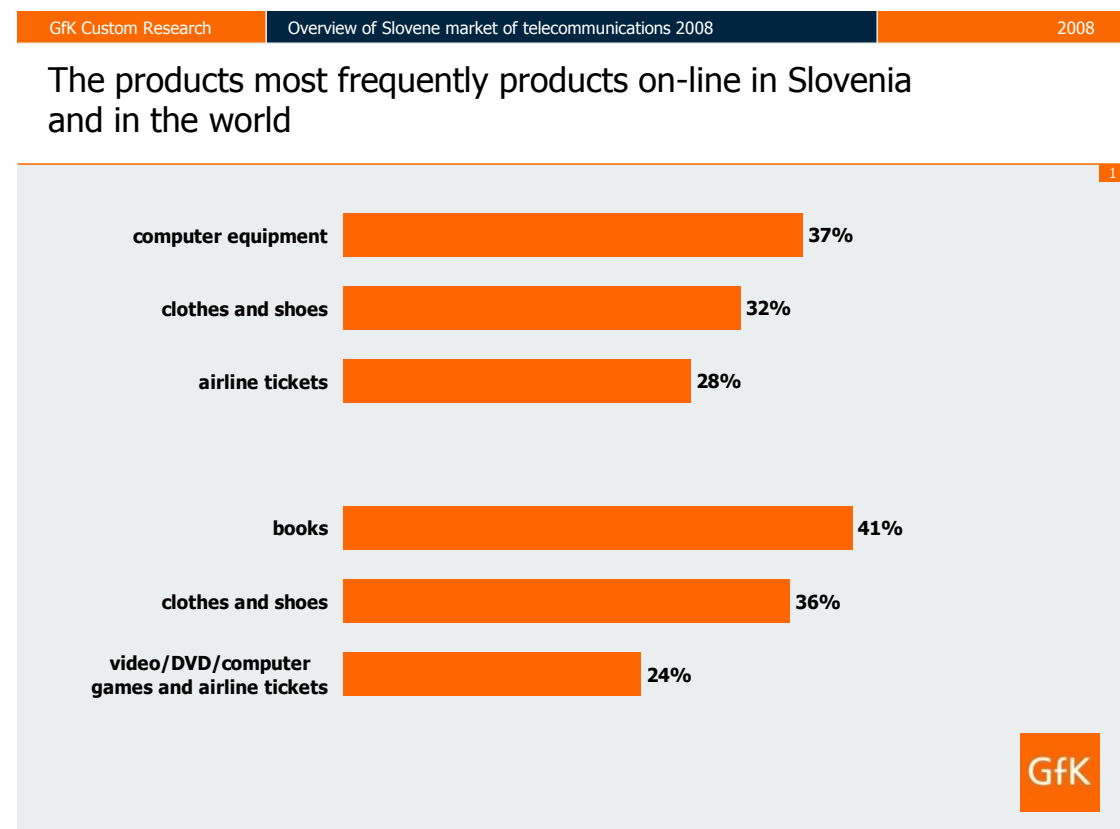
One of the reasons for the use of Internet not listed among the first five is on-line shopping, which has increased by 4 percentage points since last year. The USA is expecting as much as a 17% increase in on-line purchases in terms of the scope of sale¹ and we in Slovenia can also anticipate some growth due to the fact that we are tending to take the same paths as the USA in so many ways - to the joy of the on-line retailers!

About three quarters of on-line shoppers spend their Euros via web pages several times per year, and one quarter of them do it on a monthly basis (once or several times per month). Let us wrap up the story on on-line shopping with a look at the average amount of money spent on-line by respondents in the last year. The largest share (one third) of respondents spent between € 43 and € 209 with more than half of respondents spending over € 210 (Figure 3).

¹ <http://www.finance.si/209754>

And what do Slovenians put into their on-line carts? Computer equipment, clothes, shoes and airline tickets (Figure 2) are the items most frequently bought by the on-line shoppers (i.e. the respondents who shop on-line). According to the agency Nielsen², on a world scale books are the most common items people buy on-line: they are in fourth position in Slovenia, together with tickets and consumer electronics. Clothes and shoes are in second place both in Slovenia and the world, and third place goes to airline tickets, but with a slight distinction: on the world's scale, third place is shared with the videos, DVDs and the computer games.

Figure 1: The products bought most frequently on-line in Slovenia and in the world



It is also interesting to know why the respondents shop on-line. According to the survey Tel.com Monitor, the main reason is convenience as the purchase can be made in the comfort of your own home, without a rush through the stores and waiting in a queue at the checkout. The second reason they gave was time saving. This second point is related to the first of convenience, because travelling to the point of sale is dispensed with in this case. Lower prices are the third reason given and this comprises several factors, including surfing the Internet enables direct price comparisons, fewer expenses for a retailer (number of employees, sales format).

² <http://www.nielsen.com/solutions/GlobalOnlineShoppingReportFeb08.pdf>

These three reasons are similar to the two most common reasons given with regard to "classical" shopping (shopping in normal stores) as stated in the GfK Retail Monitor 07/08³, namely the store location (distance to a store) and the prices.

And what discourages our respondents from on-line shopping? Those who do not shop on-line most commonly cited their worries about the security of personal data as the main reason, next was the reason "I can't see the product live, in front of me" and a sense of insecurity over product delivery was also present. Most respondents pay for the products on the delivery (almost 60%) with payment cards as the second choice. The latter also involves questions about the security of personal data; participants in the purchasing process have responded differently to this obstacle so far: banks are trying to introduce proper security for their payment cards and increase their safe use, and the retailers are trying to gain the reputation of safe, reliable retailers. There are also various organizations that advise how to make a safe, quality on-line purchase (e.g. <http://www.shopsafe.co.uk>).

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³ http://www.gfk.si/2_8_trg_mon.php