

The Russia Smartphone Market: Results of 2011 and Key Trends

Mobile World Congress Barcelona
February 26, 2012

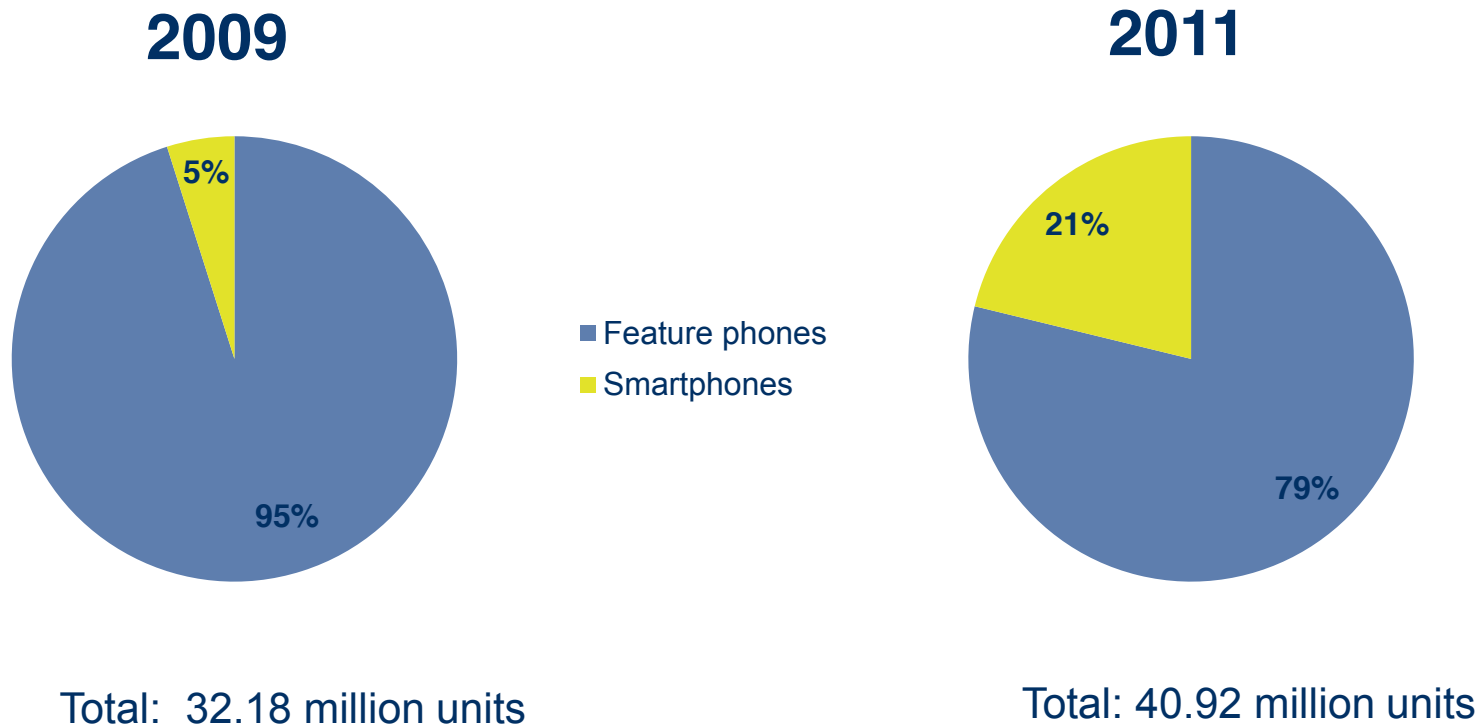
Simon Baker
Program Manager
IDC CEMA

The IDC Worldwide Mobile Phone Tracker Q4 2011

- Russian Mobile Handset Market in 2011
- A comparison of Russia and Western Europe
- IDC Forecasts

Despite Growth of Smartphones, Feature Phones Still a Larger Market in Russia

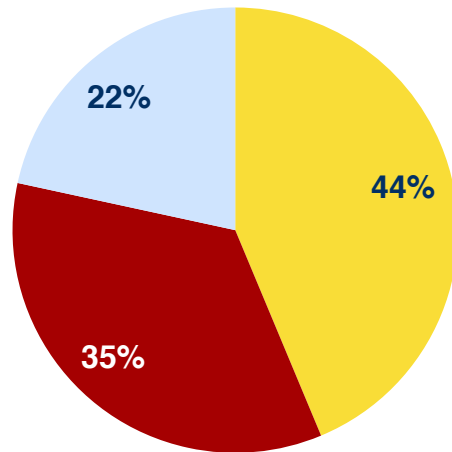
The Unit Share of Smartphones vs Feature Phones



Nokia and Samsung Dominate Total Mobile Phone Market in Russia

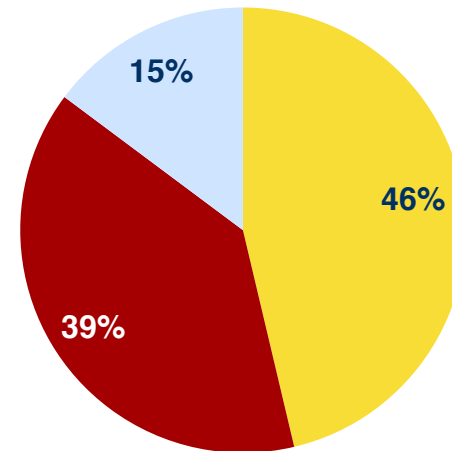
Vendor Unit Shipment Share of Mobile Phones

2009



Total: 32.18 million units

2011

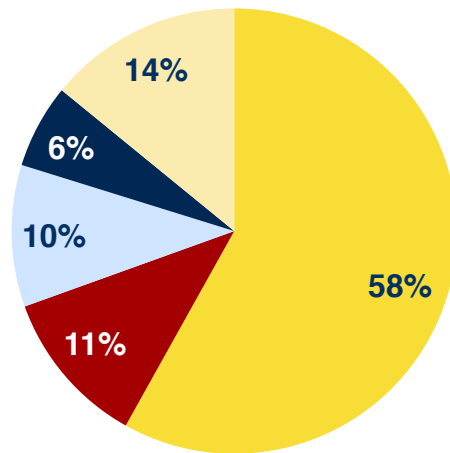


Total: 40.92 million units

Nokia Remains Leader of Russian Smartphone Market - Though its Share is Falling

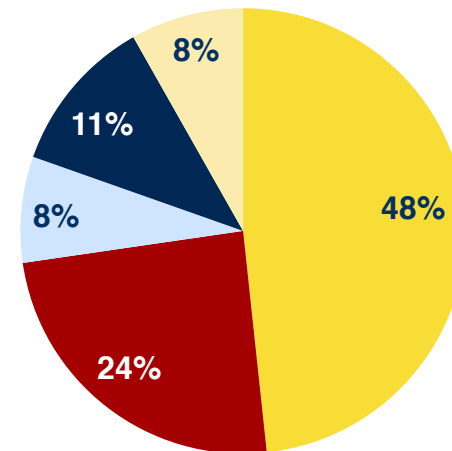
Vendor Unit Shipment Share of Smartphones

2009



Total: 1.58 million units

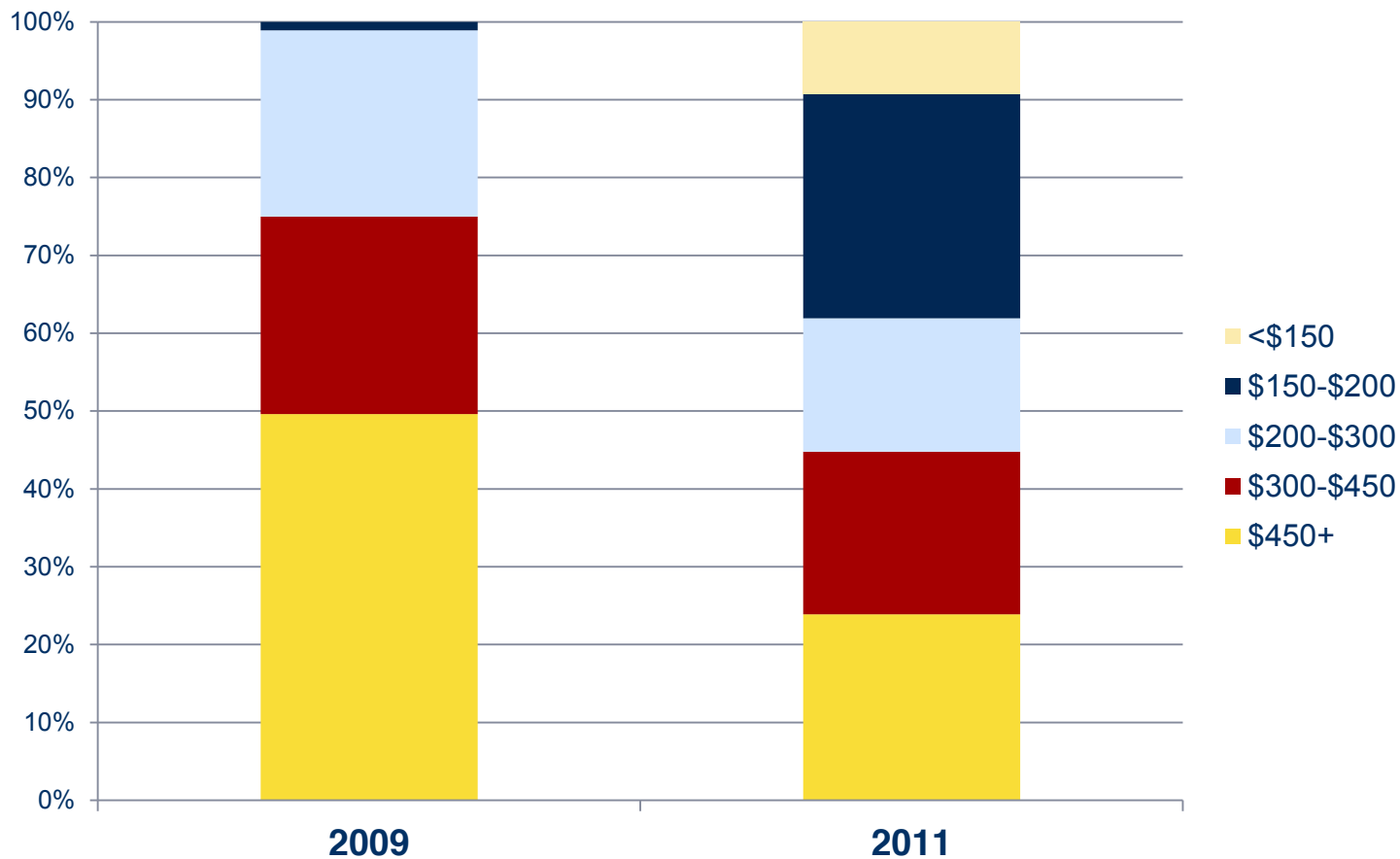
2011



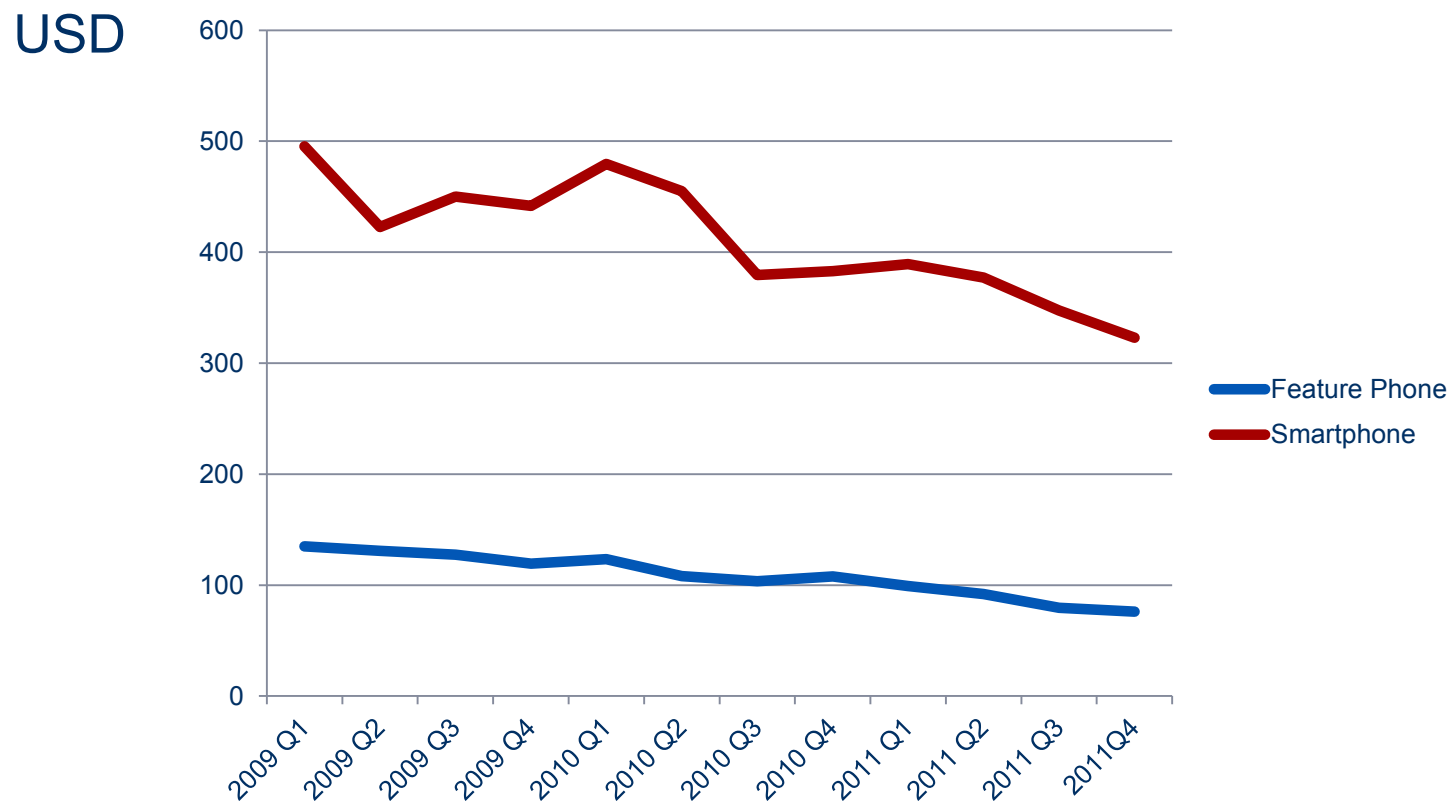
Total: 8.67 million units

Price Structure of Demand for Smartphones in Russia is Changing Quickly

The Russian Smartphone Market: Breakdown by Price Band



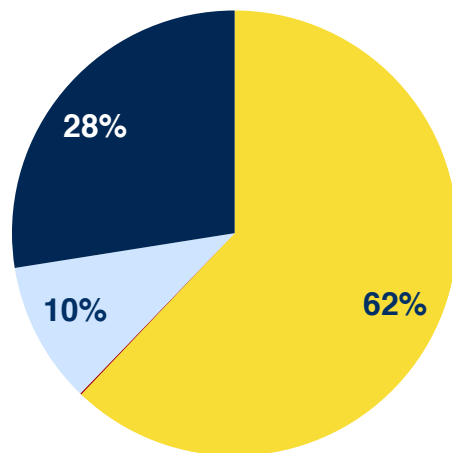
Average End-User Selling Price for Mobile Phones in Russia



Symbian Remains Major Force in Russia - Though Android is Making Major Gains

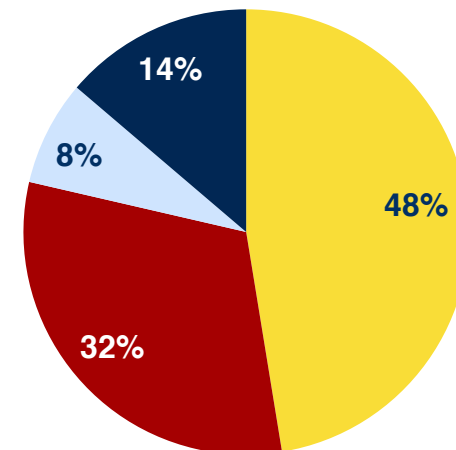
Russian Smartphone Market: Shares by OS Platform

2009



Total: 1.58 million units

2011

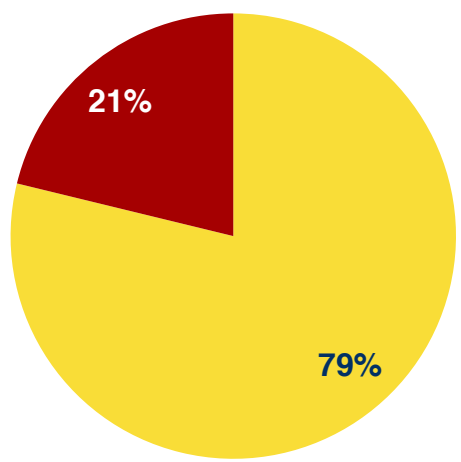


Total: 8.67 million units

Feature Phones Have Larger Role in Russia Than Regions Where Operators Dominate Distribution

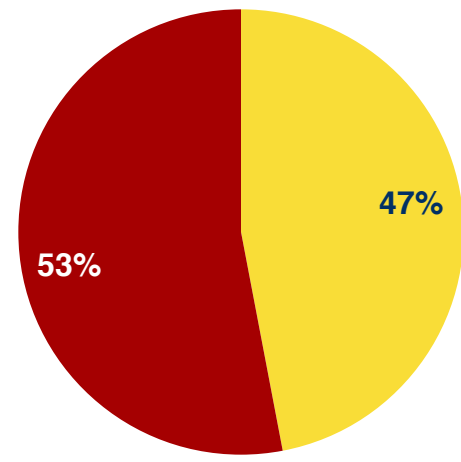
The Unit Share of Smartphones vs Feature Phones, 2011

Russia



Total: 40.92 million units

Western Europe



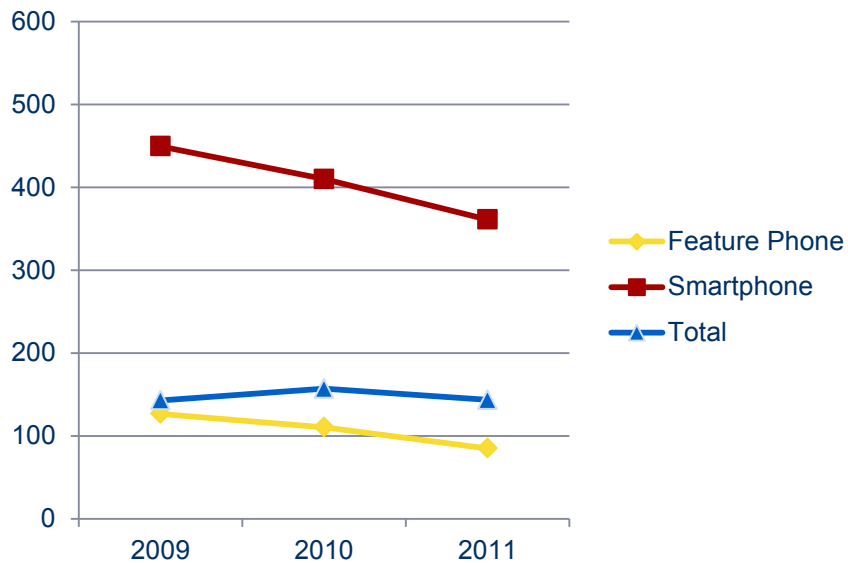
Total: 183.04 million units

■ Feature phones
■ Smartphones

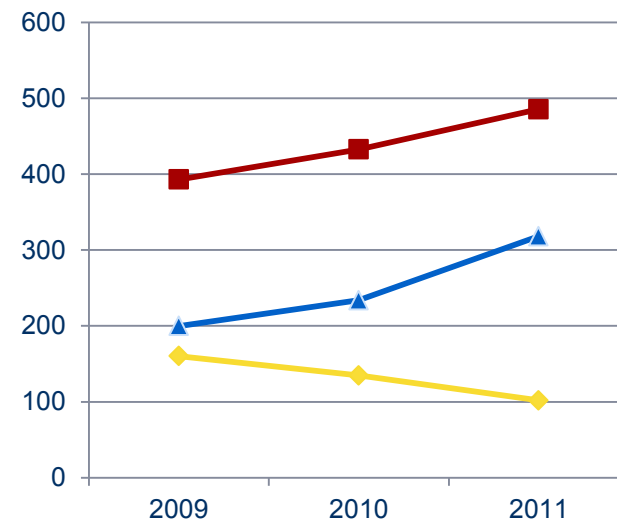
Mobile Phone Pricing Trends in Russia are Also Very Different

Average Sales Price of Smartphones (USD)

Russia

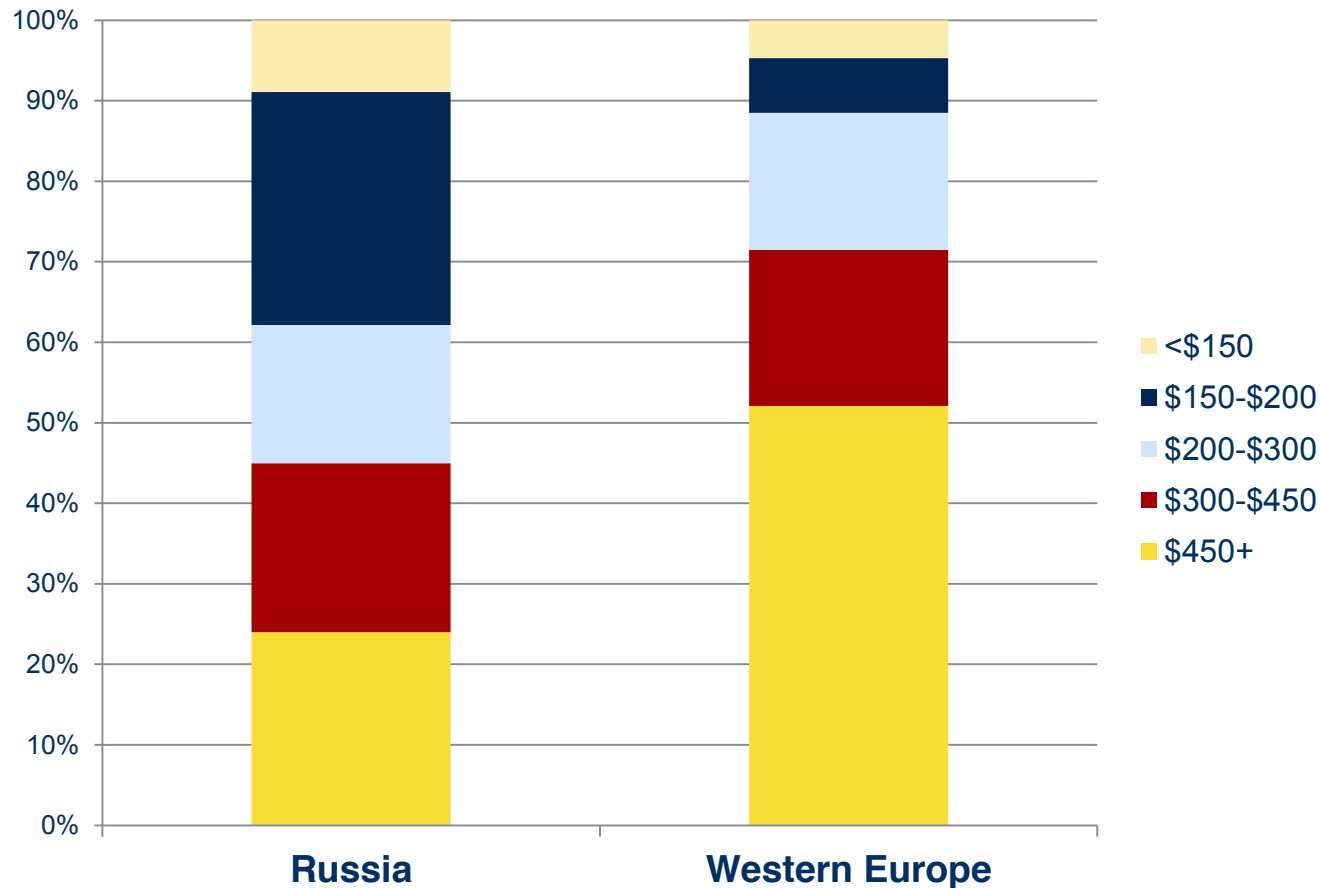


Germany



Price Structure in Russia Very Different From Regions Where Operators Sell Most Phones

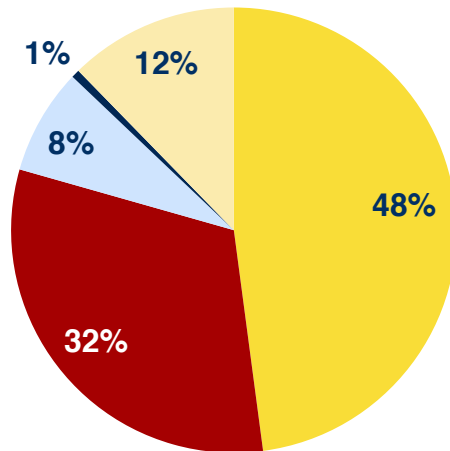
Smartphone Markets: Breakdown by Priceband, 2011



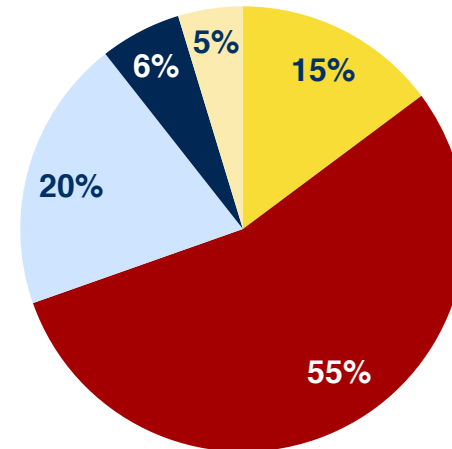
A Very Different Product Mix Gives Rise to Very Different OS Competitive Environment

Smartphone Markets: Shares by OS Platform, 2011

Russia



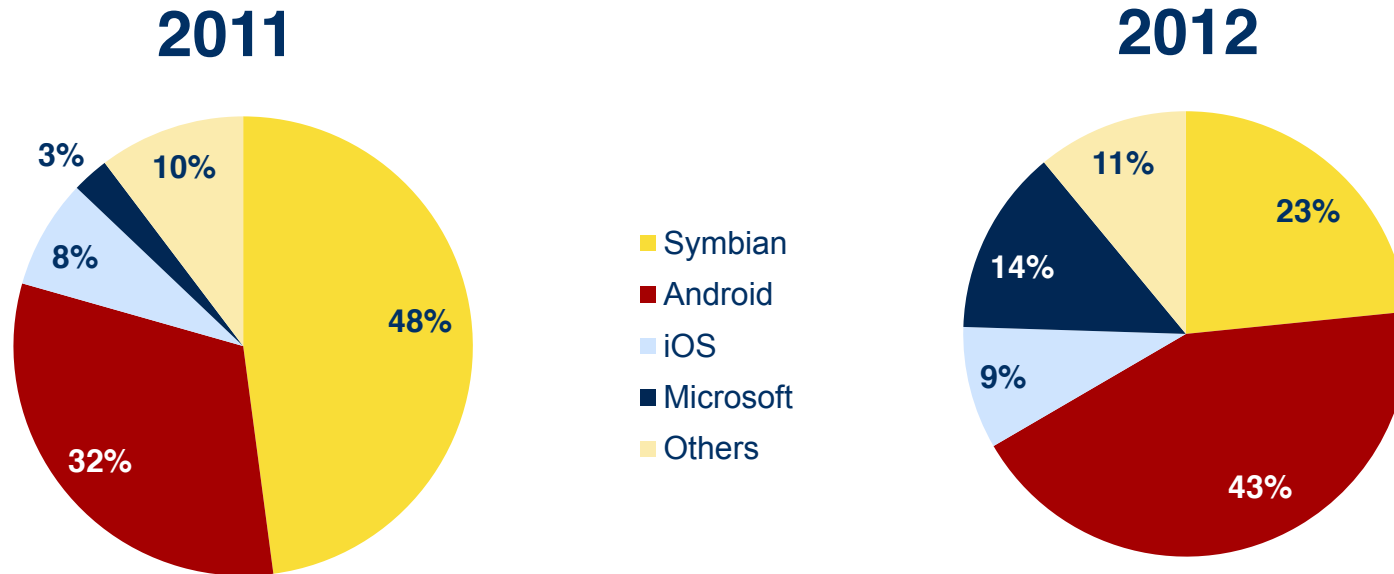
Western Europe



- Symbian
- Android
- iOS
- BlackBerry
- Others

Forecast Changes in Smartphone OS Shares in Russia This Year

OS Shipments by Units



- First Nokia Windows Phone 7 Shipments in December 2011
- Bulk of Windows 7 shipped on Nokia, HTC, and Samsung phones
- >250,000 units Windows 7 phones sold between September 2011 and February 2012

Questions?

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