

Contacts



In 2013, Russia faced a rapid growth in the number of portables per capita. About 66% of those gadgets are connected to the Internet thus forcing operators to upgrade existing infrastructure and refine their strategies. Given permanent traffic growth and limited spectrum availability, the key to operators' success lies in appropriate balance between 3G-network capacity expansion, LTE development, HetNet deployment and WiFi offload projects.



Olga Tabakova
Partner, CIS Technology, Media & Telecommunications
Industry Leader, Audit Department
Tel.: +7 (495) 787 06 63
otabakova@deloitte.ru



Anton Shulga
Partner, CIS Telecom Leader, Corporate Finance Advisory
Tel.: +7 (495) 580 9710
ashulga@deloitte.ru

Mobile Consumer Survey 2013 Russia Highlights

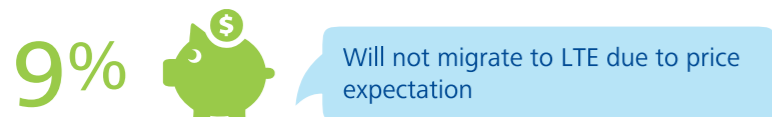
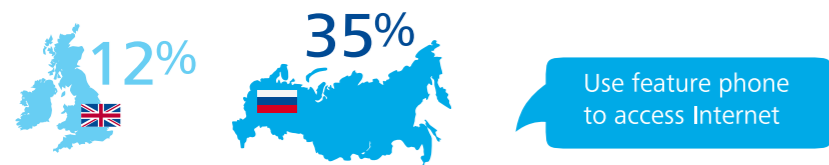


Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee, and its network of member firms, each of which is a legally separate and independent entity. Please see www.deloitte.com/about for a detailed description of the legal structure of Deloitte Touche Tohmatsu Limited and its member firms. Please see www.deloitte.com/ru/about for a detailed description of the legal structure of Deloitte CIS.

Deloitte provides audit, tax, consulting, and financial advisory services to public and private clients spanning multiple industries. With a globally connected network of member firms in more than 150 countries, Deloitte brings world class capabilities and deep local expertise to help clients succeed wherever they operate. Deloitte has in the region of 200,000 professionals, all committed to becoming the standard of excellence.

Deloitte's professionals are unified by a collaborative culture that fosters integrity, outstanding value to markets and clients, commitment to each other, and strength from diversity. They enjoy an environment of continuous learning, challenging experiences, and enriching career opportunities. Deloitte's professionals are dedicated to strengthening corporate responsibility, building public trust, and making a positive impact in their communities.

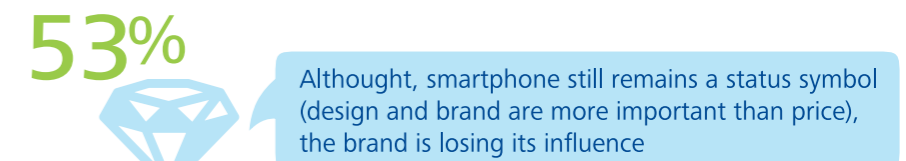
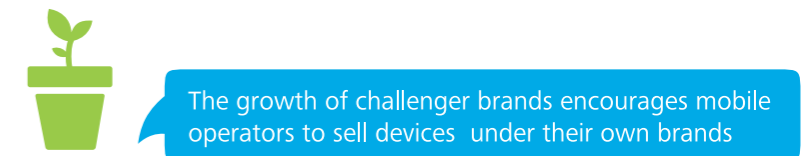
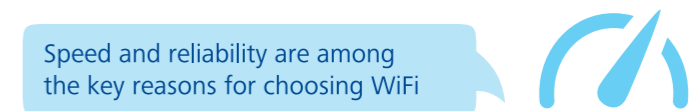
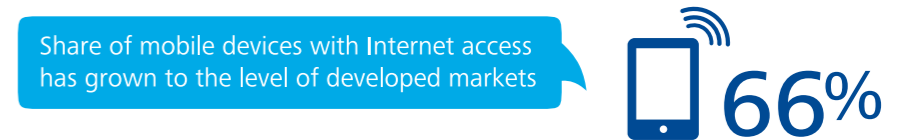
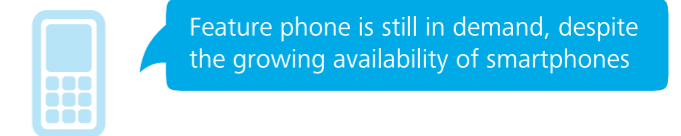
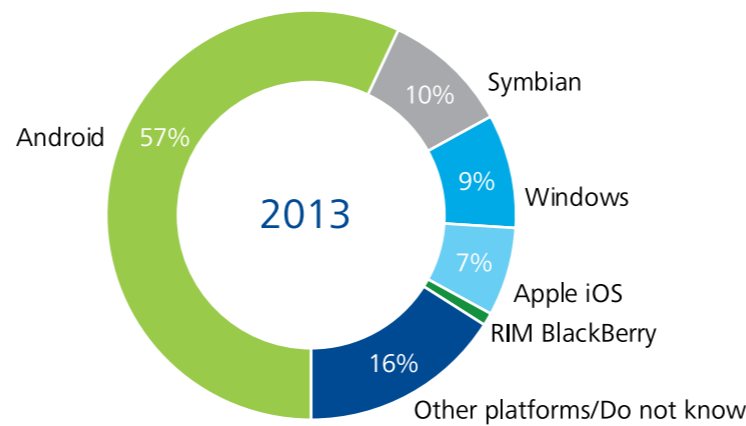
Mobile Consumer Survey 2013



| | Feature Phone | Smartphone | Tablet |
|-----------------------------------|---------------|---------------------|------------|
| Penetration | 76% 74% | 29% 47% | 14% 25% |
| Go online | 34% 35% | 67% 81% | 71% 78% |
| Use mobile Internet | 62% 62% | 71% 59% | 36% 33% |
| Use WiFi | 27% 41% | 61% 75% | 71% 84% |
| Will buy device in next 12M | 19% 28% | 24% 42% | 28% 34% |
| Average relative revenue per user | x1,0 | x1,4 | x1,5 |
| Market share of challenger brands | | 8% 13% (Average) | 32% 39% |

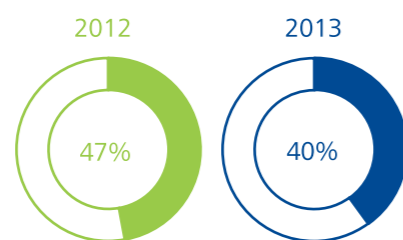
■ 2012 ■ 2013

Android leads among smartphone users



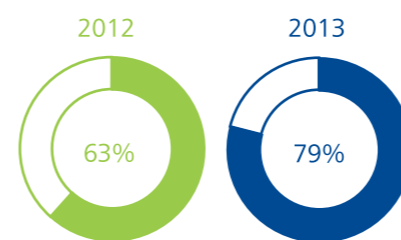
WiFi Usage

Work

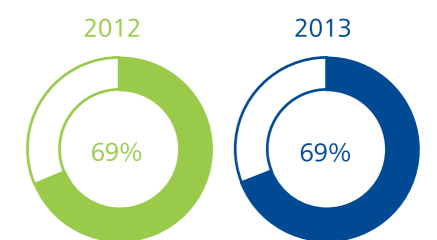


WiFi usage in Russia has caught up with developed markets

Home



Out and about



Source: 20-country online survey of mobile phone users around the world. Fieldwork took place between May to July 2013, with 38,650 responses included in the final study. The samples Belgium, Finland, France, Germany, Japan, Netherlands, Portugal, Singapore, South Korea, Spain, United Kingdom, United States are nationally representative. All samples in these countries were 2,000 except Finland (1,000), Portugal (600), UK (4,020). In Argentina, Brazil, China, India, Indonesia, Mexico, Russia, Turkey, the online research approach used results in a high concentration of urban professionals. These are likely to be relatively high earners within their country. All samples in these countries were 2,000 except Turkey (1,000). The questions for this survey were written by Deloitte member firms. The multinational online research program was managed by Ipsos MORI.