

# 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.



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## Mobile Consumer Survey 2013 Russia Highlights

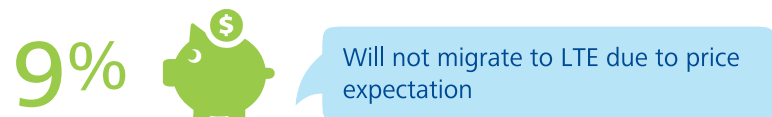


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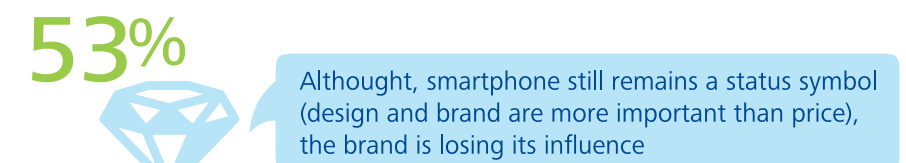
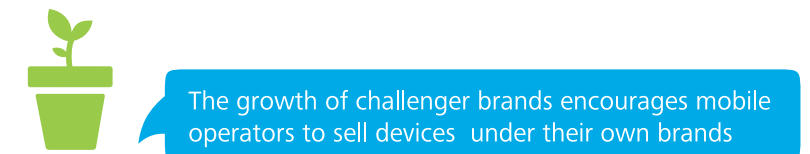
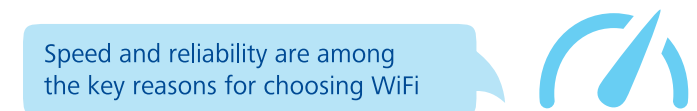
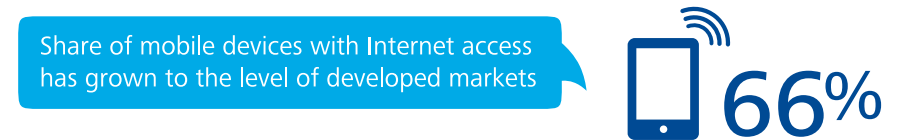
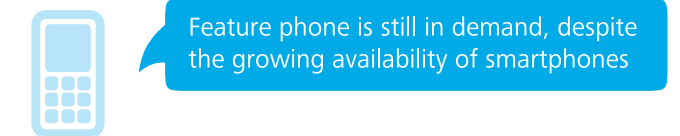
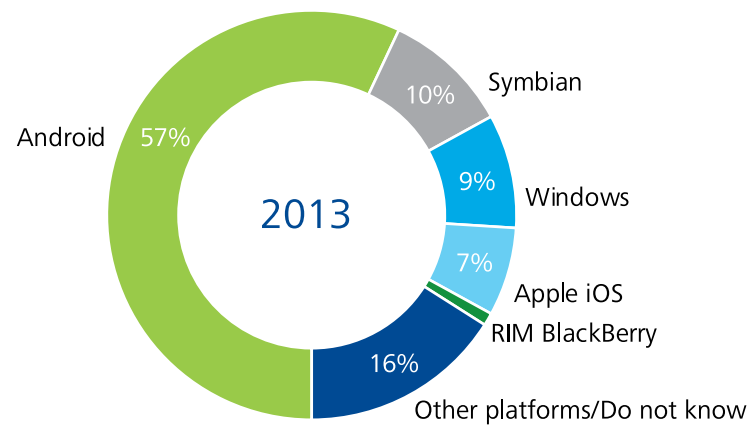
# Mobile Consumer Survey 2013



	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

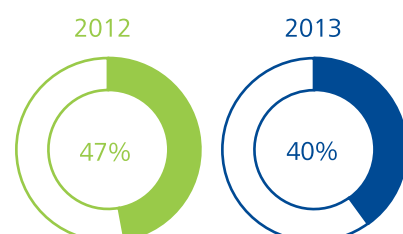


## WiFi Usage

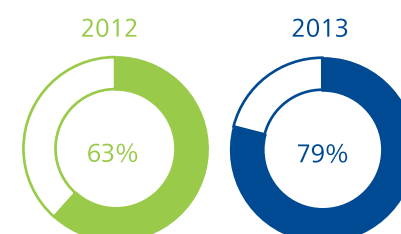


WiFi usage in Russia has caught up with developed markets

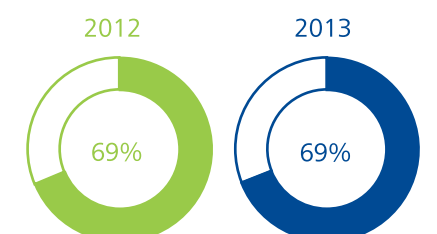
### Work



### 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.