

# The Russia Smartphone Market: Results of 2011 and Key Trends

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Mobile World Congress Barcelona  
February 26, 2012

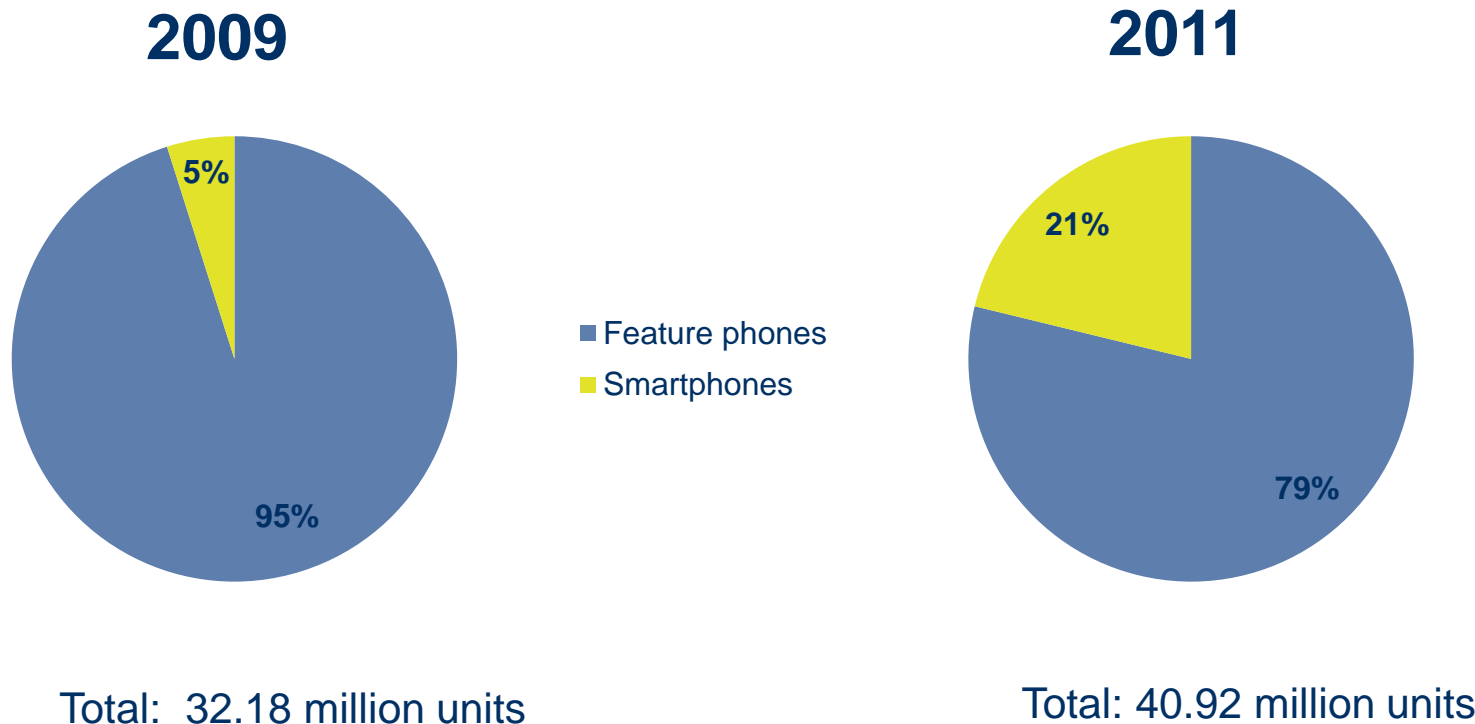
Simon Baker  
Program Manager  
IDC CEMA

## 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

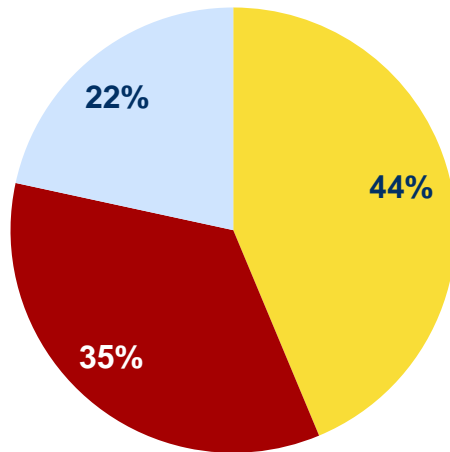
## The Unit Share of Smartphones vs Feature Phones



# Nokia and Samsung Dominate Total Mobile Phone Market in Russia

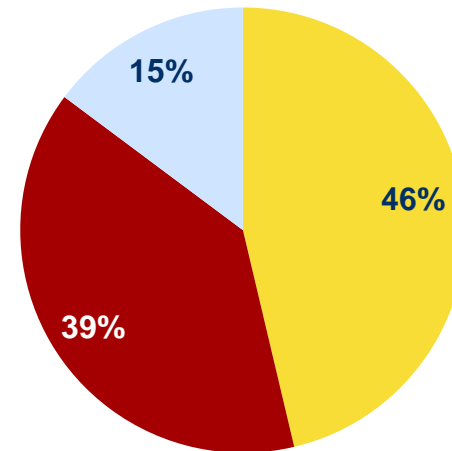
## Vendor Unit Shipment Share of Mobile Phones

**2009**



Total: 32.18 million units

**2011**

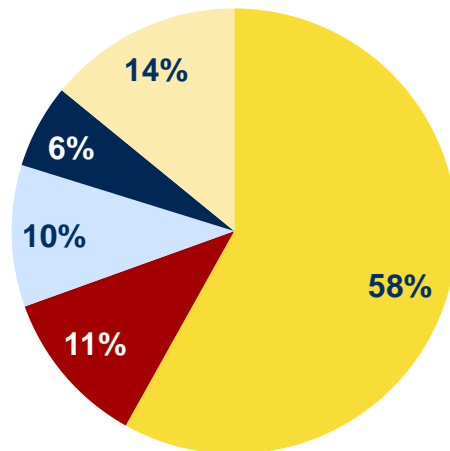


Total: 40.92 million units

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

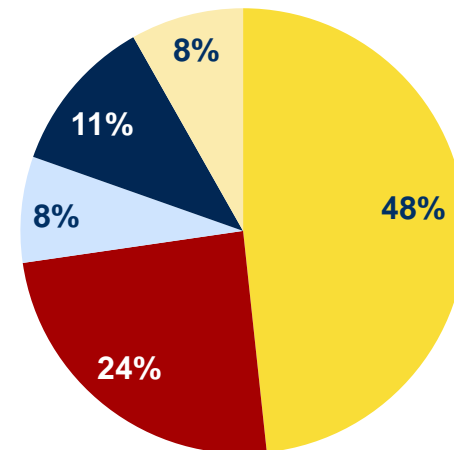
## Vendor Unit Shipment Share of Smartphones

2009



Total: 1.58 million units

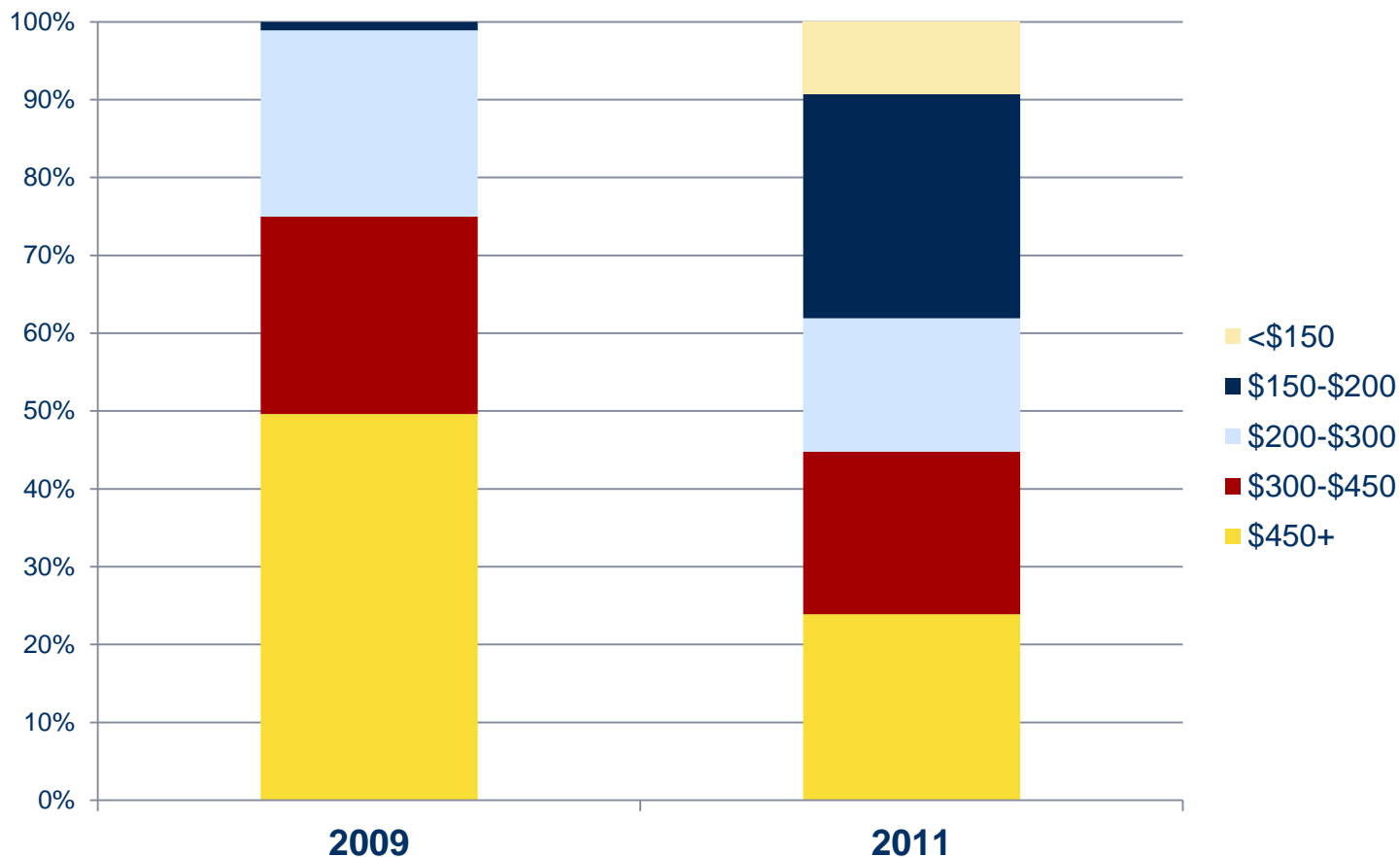
2011



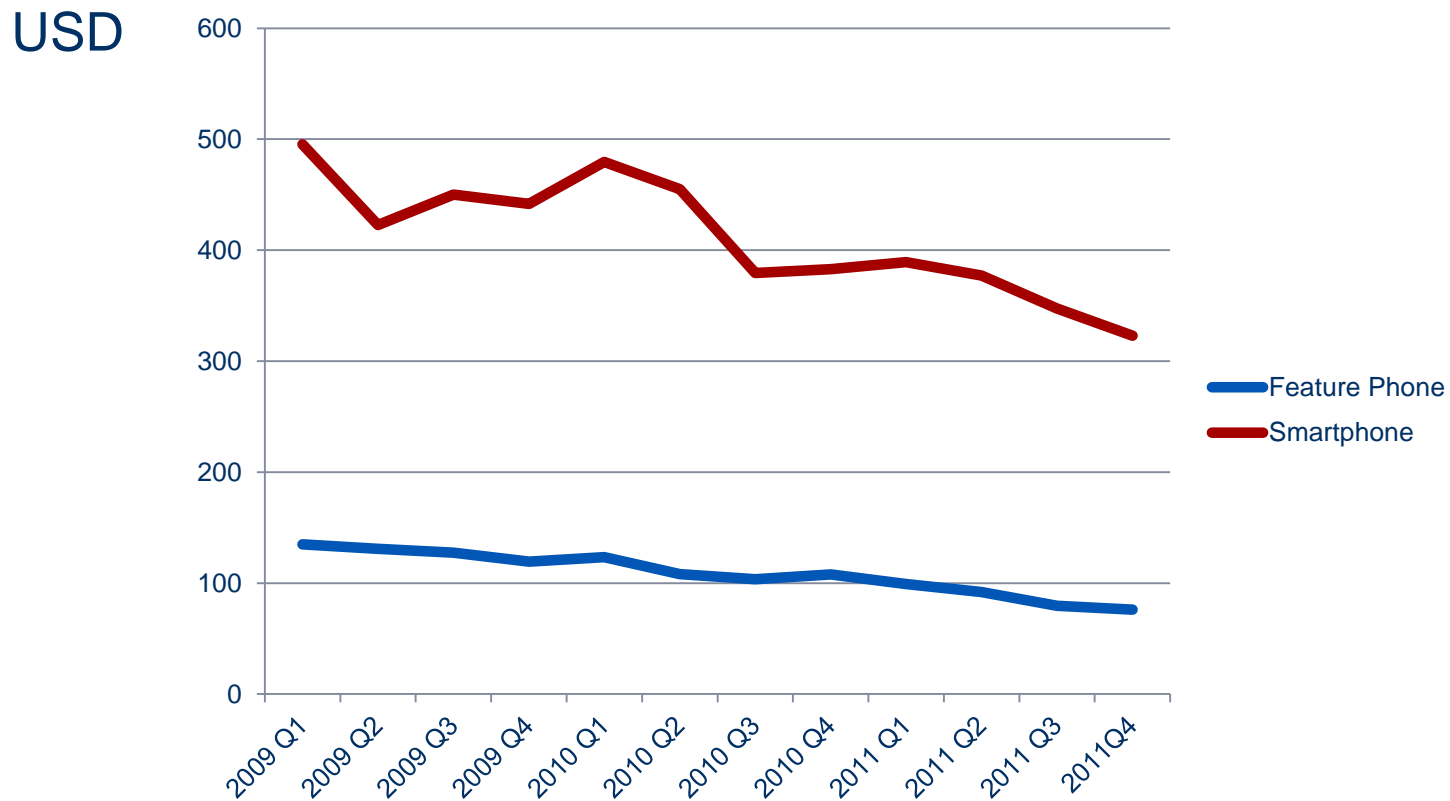
Total: 8.67 million units

# 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

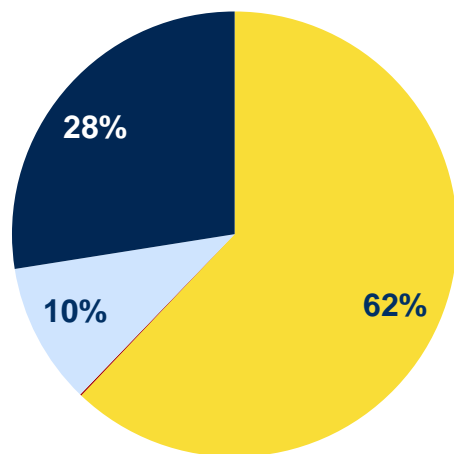




# Symbian Remains Major Force in Russia - Though Android is Making Major Gains

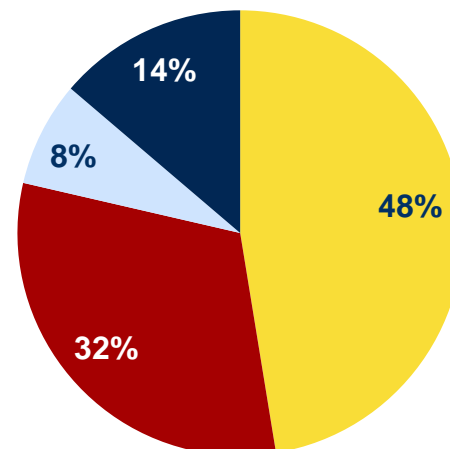
## Russian Smartphone Market: Shares by OS Platform

**2009**



Total: 1.58 million units

**2011**



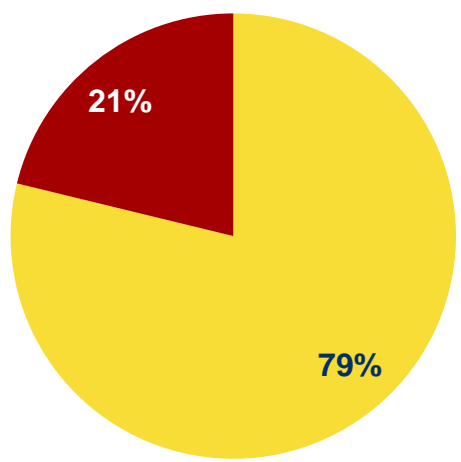
Total: 8.67 million units



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

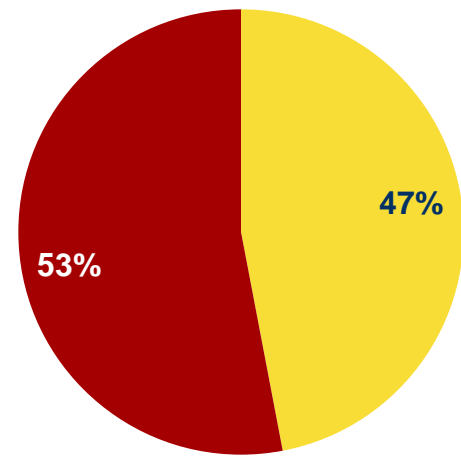
## The Unit Share of Smartphones vs Feature Phones, 2011

### Russia



Total: 40.92 million units

### Western Europe



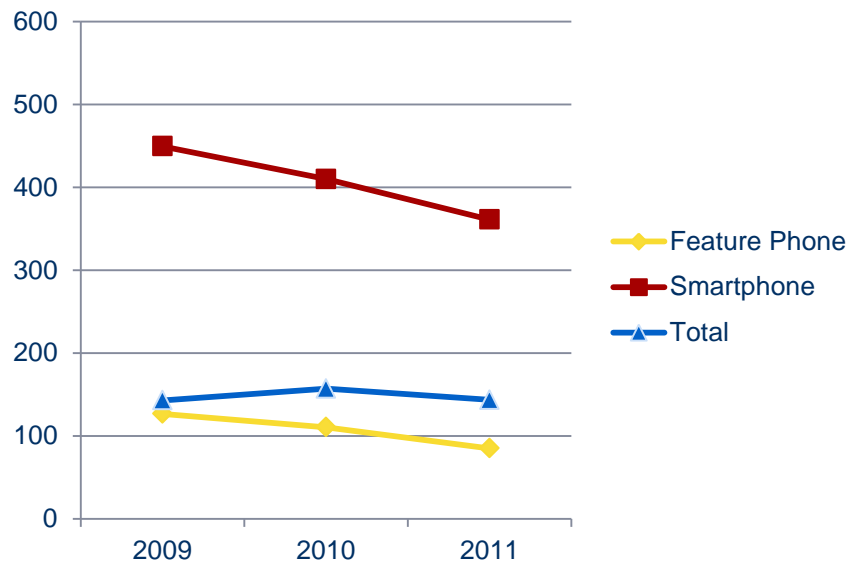
Total: 183.04 million units

■ Feature phones  
■ Smartphones

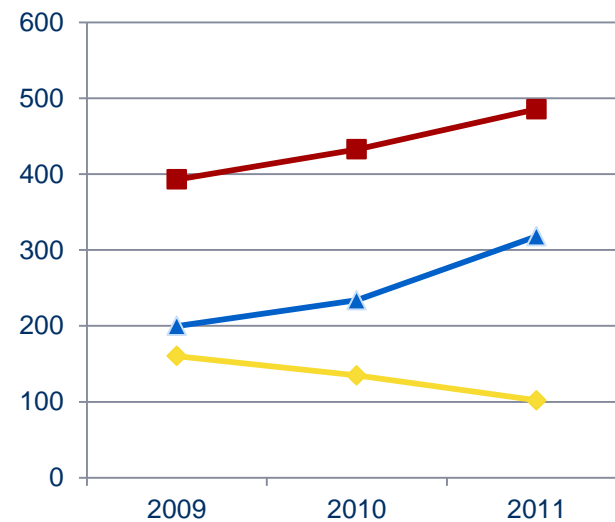
# Mobile Phone Pricing Trends in Russia are Also Very Different

## Average Sales Price of Smartphones (USD)

### Russia

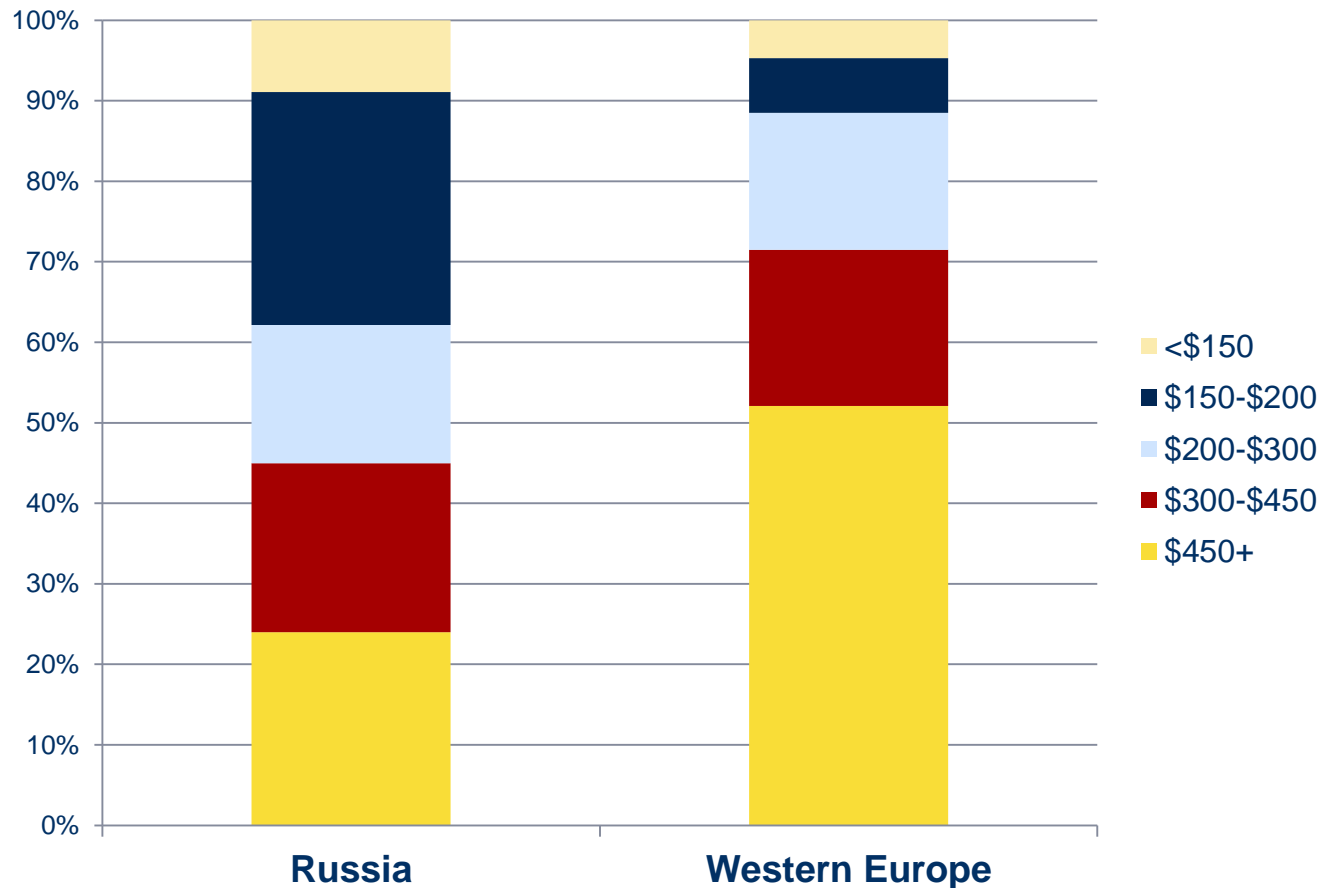


### Germany



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

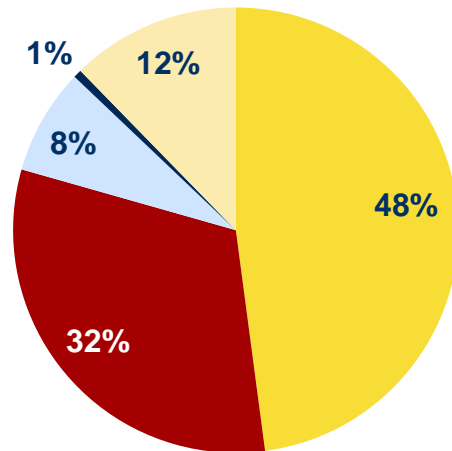
## Smartphone Markets: Breakdown by Priceband, 2011



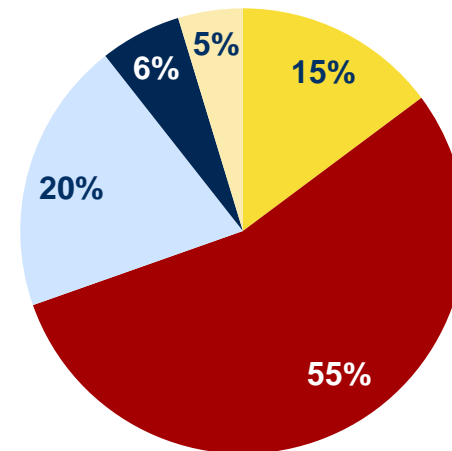
# A Very Different Product Mix Gives Rise to Very Different OS Competitive Environment

## Smartphone Markets: Shares by OS Platform, 2011

### Russia



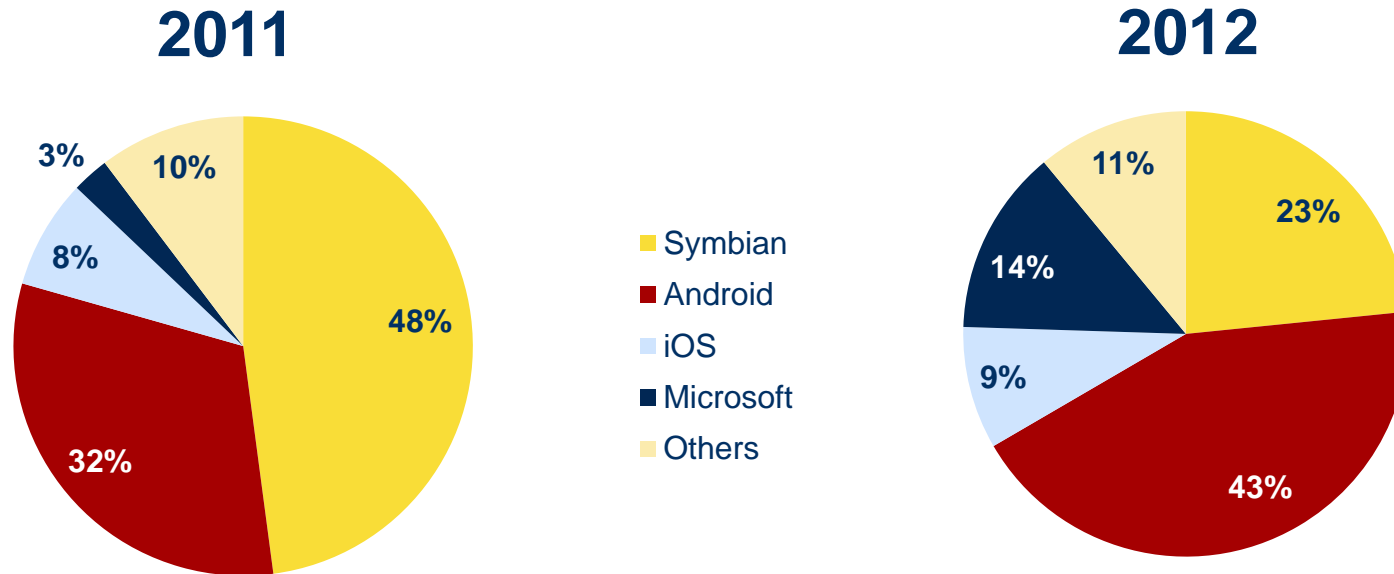
### Western Europe



- 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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