

Mobile Romania Overview

Bucharest 27th October 2014

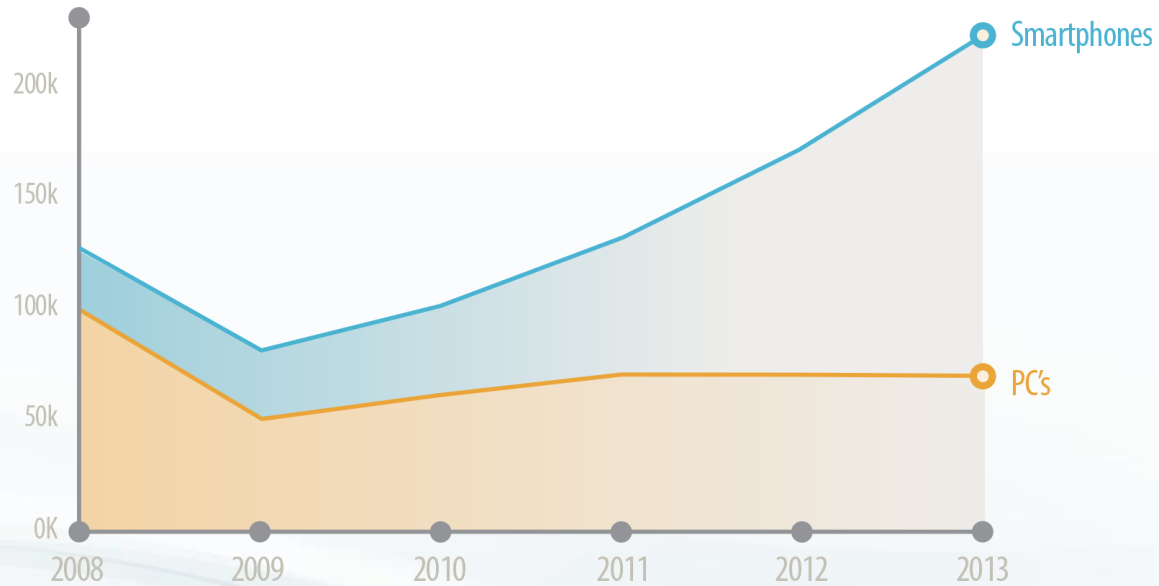
Dan Virtopeanu
Managing Partner



Romania 2014



Smartphone vs PC shipments



Romania 113,9% Mobile Penetration

22,9 million active SIM cards (9.3 million subscriptions)

13,6 million active mobile internet connections vs 3,8 million fixed broadband connections

12,1 million active mobile internet users

Third country in EU in terms of 4G coverage

7 million hours spoken daily in 2013

1,4 billion monthly SMS sent in 2013

ANCOM Report Apr 2014



Mobile Is Eating The World

More mobile users than population

More people browse from their phone than a PC since 2009. Time spent online in 2013: 51% mobile, 49% PC

Mobile browsing is the only way to access internet in many regions on the globe, including Romania rural – 1 billion people browse only from their mobile phone

SMARTPHONES era is about to start. 5 times more Android daily activations than baby births and will double in 2014.

South Korean doctors have found that increasing use of smartphones among young Koreans has led to a surge in incidence of “digital dementia” characterized by deterioration of cognitive abilities and symptoms found in people who have suffered head injury.



More Romanian Are Using Mobile Internet Than Desktop Internet

61,8% Romanians use mobile to access internet compared to 47,5% that use desktop

64% of Romanian males and 59% of Romanian women

49,1% have medium studies and 38,5% have superior studies

32,4% access internet out of home, 78,2% are using mobile data (70MB average monthly usage – ANCOM dec.2013)

22% Google Searches are from mobile phones

INS Report Dec 2013



Smartphones Era Begins In Romania

In 2 years penetration tripled

2,5 million smartphones in 2012

5,5-6 million smartphones in 2013

8 million smartphones in 2014



Smartphones & Tablets Now

- 7+ millions smartphones in Romania
- 2.7+ million tablets
- Right now, the smartphone community is the size of Facebook community.

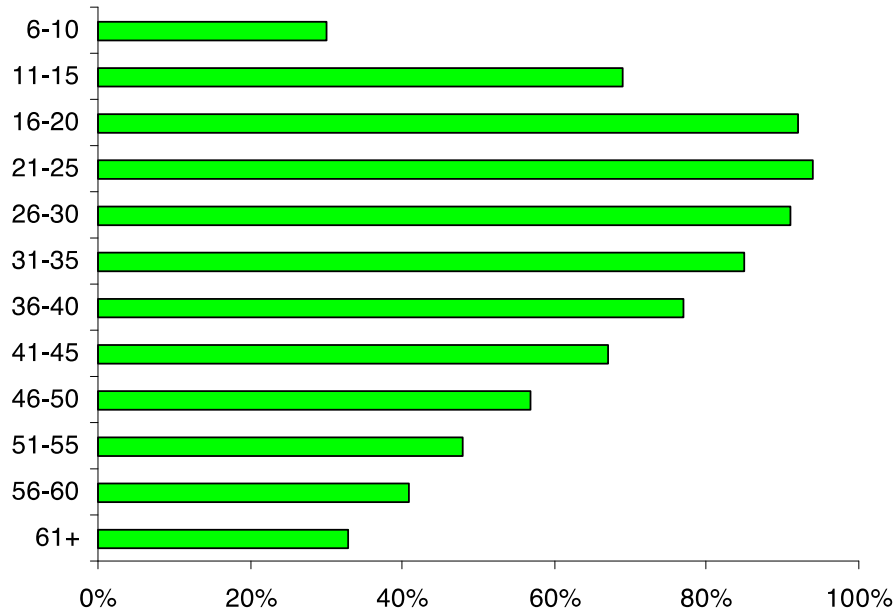


TNS Research May 2014



Mobile Phones World Wide

Mobile Phone Ownership (unique owners) Globally



Source: TomiAhonen Almanac 2013



Smartphone and Tablets across all Demographics

Age group	Smartphones penetration	Tablets penetration
16-24	63.4%	17.5%
25-34	55.9%	17.7%
35-44	37.5%	22.1%
45+	13.4%	6.7%

TNS Research May 2014



Smartphone and Tablets across all Demographics

Education	Smartphones penetration	Tablets penetration
High	46.7 %	21.2%
Medium	31.8%	11.3%
Low	13.6%	5.1%

TNS Research May 2014



Smartphone and Tablets across all Demographics

Sex	Smartphones penetration	Tablets penetration
Female	31.4 %	12.4%
Male	35.9%	14.3%

TNS Research May 2014



1,833 Billion Installed Smartphone by OS Q2 2014

OS	Units	Share
Android	1.336.000.000	72%
iOS	359.000.000	19%
Windows Phone	53.000.000	3%
BlackBerry	44.000.000	2%
Symbian	41.000.000	2%
Other	10.000.000	1%

Tomi Ahonen Consulting August 2014





$\frac{3}{4}$ of Romanian Facebook Users Are Mobile

5.4 million mobile users

4 million Android

940.000 iOS

320.000 Windows Phone

Facebook Oct 2014



Romania: Smartphones in 2015

50% penetration

Android 80%+ market share

First local app to exceed one million installs

