



Share of mobile users continues to grow

During the fourth quarter of 2009, quantity of mobile users grew up to 80% of total Ukrainian population over 16 years old, which is 7 p.p. more than in the Q4'2008. In the fourth quarter of 2009, share of users of fixed-line phones was 57%. 77% of Ukrainians without fixed-line phones at home obtained mobile connection. 10% of population does not use any type of phone connection, and this indicator is 3 p.p. lower than in the Q4'2008. That is proved by the results of regular survey on telecommunications markets conducted by GfK Ukraine.

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Connecting into masses

Young people are the most active mobile connection users – 96% of people aged from 20 to 29 use mobile phones. Level of mobile penetration slightly decreases among older groups. The lowest level of mobile usage is observed for people over 60 years old – 48%, although this indicator has significantly increased comparing with the fourth quarter of 2008 (33%). Besides, if to compare with Q4'2008, considerable growth of mobile penetration is observed among those aged between 50-59 y.o. (77% and 71% respectively).

As before, larger number of active mobile users is observed in big cities: the highest level of mobile penetration is in the settlements with 101-500 thsd. of citizens (+10 p.p. comparing with the Q4'2008), and this indicator is 86% in the cities with population over 500 thds. The smallest share of mobile users is among rural population – 72%, although it has increased by 7 p.p. comparing with the fourth quarter of 2008.

The dependence of phone connection penetration from settlement size is even more significant for fixed-line phones. Share of users of fixed-line phones services is bigger in big cities – 74% of population in settlements with over 500 thds. of inhabitants has fixed-line phone at home. Fixed-line connection is less spread among people in towns sized from 100 to 500 thds. – 67%. And the lowest penetration is observed in villages – only 38% of rural population has fixed-line phones at home.

Mobiles continue to replace fixed-line phones

Lack of opportunity/desire to use fixed-line phones push towards mobile use – 77% of respondents without fixed-line phones at home obtained mobiles (+5 p.p. comparing with the Q4 quarter in 2008).

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Table 1 demonstrates trends in fixed-line phones and mobiles use. The majority of people over 16 years old use at least one type of phone connection – 90% (+3 p.p. comparing with the Q4 quarter in 2008). 46% of population use both (this indicator remained stable comparing with the Q4 quarter in 2008). One third of population (33%) uses only mobiles, when 11% use only fixed-line phones (-1 p.p. comparing with the previous period). Share of those who do not use any of two types has dropped to 10% (comparing with 13% in the fourth quarter in 2008).



Table 1. Crosstab of fixed-line phones and mobile users

% of Ukrainian population over 16 years old

	Use mobile phones	Do not use mobile phones	Total
Use fixed-line phones at home	46.6%	10.3%	56.9%
Do not use fixed-line phones at home	33.3%	9.8%	43.1%
Total	79.8%	20.2%	100%

Source: GfK Ukraine Omnibus, the fourth quarter of 2009

New conditions of replenishment increase expenses

New conditions of balance replenishment introduced by the mobile connection providers have caused significant changes in the structure of expenses on mobile connection. Thus, during the fourth quarter of 2009 comparing with the Q4`2008:

- share of respondents who spend less than 30 UAH/month has dropped from 42% to 16%;
- share of respondents who spend 30-35 UAH/month on mobile connection has grown up from 12% to 53%;
- share of respondents whose expenditures on mobile connection were 36-50 UAH/month has declined from 21% to 14%.

Reference information

We make conclusions basing on the population survey data gathered during the regular monthly study of finance and telecommunications markets.

The objective of Finance and telecommunications markets survey is to provide regular and immediate information on the markets of bank, insurance and telecommunications services for individuals.

The monthly survey sample is 1000 of respondents over 16 years old. Sample is representative for the Ukraine's population by gender, age, region and settlement size. The survey was conducted through face-to-face interview method.

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