Mobile Handset Population in Finland 2005-2010

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MoMIE: Comprehensive view on mobile service usage

MoMIE RESEARCH:
- Surveys on handset panel
- Handset monitoring
- Mobile operator accounting systems
- IP traffic measurements
- Web analytics

Source: Modified from Kivi, 2009
Data collection: handset population

• Mobile operators’ accounting systems
  – Data from end of Q3, annually 2005–2010
  – Feature information: from GfK and public sources

• Represents 80-99% of mobile terminals used in Finnish mobile networks annually
  – Data from DNA, Elisa, and TeliaSonera
  – Includes mobile terminals observed at operators’ network
  – Some error due to
    • No data on Apple iPhone from TeliaSonera
    • Mobile subscriber churn during the observation period
    • Slight differences in operator-specific data sets
    • Unidentified terminals and missing feature-data of handset models
Share of data terminals growing

- Increasing amount of also other device types than mobile handsets
  - Data terminals mostly USB modems (large scale introduction: fall 2007)

- Other device types (e.g. desktop phones) excluded from the analysis
Top mobile handset models in Finland

- **Features of Top 15:**
  - Packet data in 12
  - Six WCDMA devices
  - Symbian OS in three

- **First smartphone 4th**
  - Symbian S60
  - Touch screen, GPS
  - Price < 150€

- **Top 10 smartphones**
  - Symbian OS handsets
  - 8/10 with HSDPA

**Top 15 handset models in use in Finland (Q3/2010)**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Model name</th>
<th>Share of all handsets</th>
<th>Change from 2009</th>
<th>Packet data*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Nokia 2760</td>
<td>3.8%</td>
<td>→</td>
<td>GPRS/EDGE</td>
</tr>
<tr>
<td>2</td>
<td>Nokia 3120 Classic</td>
<td>3.5%</td>
<td>→</td>
<td>WCDMA</td>
</tr>
<tr>
<td>3</td>
<td>Nokia 1100</td>
<td>2.7%</td>
<td>→</td>
<td>-</td>
</tr>
<tr>
<td>4</td>
<td>Nokia 5230</td>
<td>2.0%</td>
<td>→</td>
<td>WCDMA</td>
</tr>
<tr>
<td>5</td>
<td>Nokia 2730 Classic</td>
<td>2.0%</td>
<td>→</td>
<td>WCDMA</td>
</tr>
<tr>
<td>6</td>
<td>Nokia 3720 Classic</td>
<td>1.9%</td>
<td>→</td>
<td>GPRS/EDGE</td>
</tr>
<tr>
<td>7</td>
<td>Nokia 2600 Classic</td>
<td>1.8%</td>
<td>↓</td>
<td>GPRS/EDGE</td>
</tr>
<tr>
<td>8</td>
<td>Nokia 3710 Fold</td>
<td>1.7%</td>
<td>↑</td>
<td>WCDMA</td>
</tr>
<tr>
<td>9</td>
<td>Nokia 3110 Classic</td>
<td>1.7%</td>
<td>↓</td>
<td>GPRS/EDGE</td>
</tr>
<tr>
<td>10</td>
<td>Nokia 2330 Classic</td>
<td>1.7%</td>
<td>↑</td>
<td>GPRS/EDGE</td>
</tr>
<tr>
<td>11</td>
<td>Nokia E75</td>
<td>1.6%</td>
<td>↑</td>
<td>WCDMA</td>
</tr>
<tr>
<td>12</td>
<td>Nokia 3310</td>
<td>1.6%</td>
<td>↓</td>
<td>-</td>
</tr>
<tr>
<td>13</td>
<td>Nokia 1600</td>
<td>1.6%</td>
<td>↓</td>
<td>-</td>
</tr>
<tr>
<td>14</td>
<td>Nokia E71</td>
<td>1.6%</td>
<td>↑</td>
<td>WCDMA</td>
</tr>
<tr>
<td>15</td>
<td>Nokia 2610</td>
<td>1.6%</td>
<td>↓</td>
<td>GPRS</td>
</tr>
</tbody>
</table>

**Top 10 smartphone models in use in Finland (Q3/2010)**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Model name</th>
<th>Share of all handsets</th>
<th>Change from 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Nokia 5230</td>
<td>2.0%</td>
<td>↑</td>
</tr>
<tr>
<td>2</td>
<td>Nokia E75</td>
<td>1.6%</td>
<td>↑</td>
</tr>
<tr>
<td>3</td>
<td>Nokia E71</td>
<td>1.6%</td>
<td>↑</td>
</tr>
<tr>
<td>4</td>
<td>Nokia E51</td>
<td>1.5%</td>
<td>↓</td>
</tr>
<tr>
<td>5</td>
<td>Nokia N95 / N95 8GB</td>
<td>1.3%</td>
<td>↓</td>
</tr>
<tr>
<td>6</td>
<td>Nokia E90 Communicator</td>
<td>1.1%</td>
<td>↓</td>
</tr>
<tr>
<td>7</td>
<td>Nokia E52</td>
<td>1.1%</td>
<td>↑</td>
</tr>
<tr>
<td>8</td>
<td>Nokia 5800 XpressMusic</td>
<td>1.0%</td>
<td>↑</td>
</tr>
<tr>
<td>9</td>
<td>Nokia N73 / N73 Music Edition</td>
<td>0.8%</td>
<td>↓</td>
</tr>
<tr>
<td>10</td>
<td>Nokia N97</td>
<td>0.8%</td>
<td>↑</td>
</tr>
</tbody>
</table>

* All WCDMA handset models have GPRS/EDGE/WCDMA capability
** All top 10 smartphones have GPRS/EDGE/WCDMA capability
Fragmentation of handset population

Share of top 30 handset models

Share of top model from 15% (2005) to 4% (2010)

Cumulative share of top 100 handset models

Top 50 from 88% (2005) to 61% (2010)

Share of top 10 about 23%
Nokia dominates handset population

- Nokia - 86.6% of devices
  - First non-Nokia ranked 29th

Others
- “Others”, Sony/Ericsson, and BenQ/Siemens combined share 5.4%
- HTC and LG with largest shares in “Others”, both < 1%

Samsung
- Second with ~ 7.9% share

Mobile handsets by manufacturer 2005-2010
Mobile handsets by operating system

<table>
<thead>
<tr>
<th>Year</th>
<th>Nokia OS</th>
<th>Symbian OS</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>52%</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>39%</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>30%</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>23%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>18%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>13%</td>
<td>13%</td>
<td></td>
</tr>
</tbody>
</table>

**Others**
- Samsung OS ~7%
- Sony/Ericsson OS ~2%
- Android < 1%

**Symbian OS**
- Share from 22% to 26%
- Qt for Symbian support ~23% (3rd. Ed FP1)

**Nokia Series 40**
- Share decreased 49.5% → 47.5%
Higher data transfer speeds spread fast

- Especially 3G technologies
  - WCDMA, WCDMA900, HSDPA
- WLAN slower
- GPS in almost 25% of handsets
  - Feature included increasingly in mid-range models

**Penetration of handset features in Finland 2005-2010 (1)**

- N = 4.6.6 Millions
- Upper and lower error margins presented with
Many features with high penetration

- Many features close to saturation
  - Low-end population limits penetration
- HTML capable browser in almost 50% of devices

Penetration of handset features in Finland 2005-2010 (2)

N = 4.6 Million

Upper and lower error margins presented with ±
Emerging input methods substitute numeric keypad

- Share of handsets with numeric keypad as the only input method decreasing (2009: 92% → 2010: 82%)
- Especially touch screen penetrating fast
Conclusions

• Typical handset manufactured by Nokia (86.5%)
  – Series 40 (45%) the largest development platform, share of Symbian (26%) growing

• Advanced features spreading fast
  – With increasing share of handsets possible to consume advanced services & content
  – New input methods (touch screen, QWERTY) substituting numeric keypad
Further information

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