RESEARCH ON INTERNET IN SLOVENIA

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RIS2001

mobile telephones

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SUMMARY

In June 2001 a telephone survey (n = 902 and = 529) among ***target population 10–75 years*** (1,7 million people) has been conducted within RIS research project. The survey was basically a replication of a similar standardized survey in December 2000, however, the December survey was much larger (n=2,000). The June survey was performed after Simobil GSM Spring promotion and before GSM Mobitel Summer promotion. The basic findings in the June 2001 survey are the following:

- The first six months of the year show a rapid growth of mobile telephones (yearly average growth rate around 50%) – what is substantially faster than the predicted intentions six months ago. Slovenia is thus around 65% population penetration in the sense of connection density (connections / subscriptions per 100 habitants) and 1,1 million device-owner.
- The future six-month intentions for buying new connections are much smaller. In comparison with December 2000 they are cut in half, however, the intentions to exchange/renovate the devices are remaining the same.
- Si.Mobil has reached one fifth of the market share. Among devices Nokia is prevailing; it is now approaching the share of 50% in the current six-month purchase intentions;
- Despite extremely high usage of SMS (75%) the interest for automatic SMS information delivery (SMS services) is relatively small. The same goes also for mobile WAP access. In the last six months - despite its considerable growth (it is now used by approximately 4% of target population, from 3% in December 2000) - we can notice dramatic drop of the interest and WAP purchase intentions.

Let us take a look at some other more detailed findings:

- Mobile telephones have expanded fast in the first six months of the year 2001. In June 2001 mobile phone have been used by more than 80 % of households and by 70% of the target population (December 2000 – 59%). Around 65% of target population (1.1 mio) owns the devices personally; some use others' people devices. Around 3 – 5% of target population own two or more devices, which represents, in comparison with previous survey, a certain decline.

- Mobile phone is thus used by almost 1,2 million persons, however only 1,1 million users have their own device which represents 60% and 55% respectively of the total population. The number of connections is of course higher, around 1,3-1,4 mio, because of the users with multiple devices and because of the corporate devices. Of course, these survey estimates include sampling error that sets a margin about 60,000 wide in each direction.

- Purchase intentions at the end of the year 2000 have been considerably superseded in the first part of 2001. In the first six months of the year 2001 more than 20% growth in number of connections has been recorded, but in the future it is expected to slow down considerable. Only 11% of target population (December 2000 – 14%) is considering a purchase of new mobile phone connection, 5% of them in the next six months (December 2000 – 10%). Around 27% of target population (December 2000 – 26%) is considering buying a new device or exchanging the old one, 15% of them in the next six months (December 2000 – 20%). The decline of six-month intentions for new devices is contributed exclusively to the decreased plans for new connections. Approximately 10% of target population (170,000) still intends to exchange/replace their current device in next six months – the same percentage as in December 2000.

- About 8% of new connections have used an old SIM card and 75% of users that intend to exchange the device also intend to keep the old card. It is to be added that in the case of mobile device purchases, about 10% of accomplished purchases also deal with old devices.

- The Mobi package holds a 44% market share, Mobitel GSM 31%, Mobitel NMT under 1%. Si.Mobil holds 19% of market share (December 2000 – 14%), 10% of it with the Halo package and 9% with Si.Mobil GSM. Debitel is used by approximately 6% of users.

- Users express high level of satisfaction with the operators. That especially goes for new subscribers, what (in the year 2001) basically relates to Mobi package and Si.Mobil GSM. Users are especially satisfied with Mobitel's coverage and quality of signal and by Si.Mobil GSM's customer services.

- The purchase intentions basically reflect the existing situation, however, it is still additional skewed towards Mobitel packages. However, this can be always changed with an aggressive promotion campaign – similar to that of Si.Mobil GSM in first half of 2001 (there were almost no buying intentions for Si.Mobile GSM in December 2000, before their Spring Simobil campaign started).

- Most of mobile telephone users, about one third (32%), use the brand Ericsson of the mobile device, however it is loosing its market share very fast (December 2000 – 39%). It is followed by the users of Nokia (21%) and Siemens (10%). These brands are especially dominating in this year. It is to be added that six-month purchase intentions (predictions) of the brands in December 2000 are almost completely compatible with the actual purchases performed in these same six months of the year 2001. Current buying intentions are concentrated on Nokia even stronger as it now represents almost a half of all future six-month buying intentions. It seems, however, that the advertising and promotion has somehow less impact on the selection of the mobile device brands than on the selection of the mobile operator brand.

- The satisfaction of users concerning the devices is very high; Again Nokia - also Motorola and Siemens - are prevailing. The low satisfaction with the device is also strongly connected to the strong intention for replacing this device. Here, of course, the specific interaction is present as the owners of new devices (e.g. Nokia) are always more satisfied than the owners of the old devices (e.g. Ericsson) regardless of the brand.

- The share of SMS users is stable at 75% of mobile users; the majority of them (38%) use SMS daily. However, interest to receive SMS automated service information is relatively low. The highest existing interest is detected with banking. Among current SMS users there are even more SMS users that have already used the SMS information service and have also stopped using it (5%), than the users that are actually subscribed to some SMS info services (4%).

- The use of WAP has reached about 4% of target population (December 2000 – 3%). It is indicated that the intention of WAP usage and six months buying intentions have significantly decreased. In the middle of 2001 around 12% of target population (December 2000 - 14%) or one-fifth of mobile phone users (December 2000 – one third) have been somehow thinking of using WAP. In the next six months, however, 4% of target population is planning the purchase. High buying intentions six months ago – in December

2000 around 7 % of the target population have been planning the WAP purchase in six months – have thus not been realized.

- If the competitive operator had offered better mobile connection to Internet, the current and future users would stay relatively loyal to their current operator.

- Among population segments, the age group 10 – 25 and 26 – 35 are dominating in the mobile phone penetration. The lowest penetration of mobile phones can be found in the segment of pensioners and housewives. There are also considerably less mobile telephones users among women than among men. In addition, on average women make 50% less calls per day than the man. Women are also less certain of their buying intentions; they use and plan WAP lesser, but are showing greater interest for SMS information services. They are also more tolerant, judicious and careful in their attitudes and behavior towards mobile telephones. There exist some other specifics regarding to the age, education and computer orientation as well as with respect to the buying intentions among different segments.

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1 METHODOLOGY

The report is based on a telephone survey, conducted in June 2001 (n = 902) in the segment 10-75 years, which corresponds to 1.7-mio population. The survey has especially emphasized the calls to the hard-to-reach respondents. More than 20 calling attempts have been conducted. Thus more than 60 % (e.g. completion rate) of the selected telephone numbers from the Slovenian telephone directory have been reached and surveyed.

However, due to randomly assigned blocks of questions, only the segment of 529 respondents answered to the questions related to the mobile telephones.

In the following report there are many comparisons with the previous RIS survey on mobile telephones conducted in December 2000, which had a similar structure, but much larger sample (n=2049).

The data were additionally corrected with iterative population corrections (raking), based on age, education, gender, region, place and working status. In addition to the stated variables (margins) the raking also considered the interaction of gender and age, as well as that of education and employment status. In all control variables the sample thus corresponds to the population. The weights that were too large were truncated.

Because of the small number of units in certain subgroups, **the following limitations should be considered**:

- • Unacceptable estimate (less than 10 units) - CV>0.33
- (()) Very imprecise estimate (10 – 20 units) – 0.2<CV<0.33.
- () Imprecise estimate (20 – 30 units) – 0.1<CV<0.2.

It is also important to consider that only with very small coefficient of variation, e.g. CV = se (p)/p < 0.10 we can get a really good precision. Here, for small groups the approximation:

$$CV \approx 1/\sqrt{n_a}$$

can be used, where n_a is the size of the group. Thus, only the estimates pertaining to groups of users with more than $n_a = 90$ units in a sample, are really precise (CV<0.1).

Due to the small sample size of certain subgroups the corresponding estimates may be thus imprecise. With groups smaller than $n_a = 10$ (CV > 0.33) the results are illustrative only for ranking. Sometimes instead of a dot alone, such illustrative and imprecise percentage would be labeled with a big dot, such as •5%.

Small cells are thus used merely as illustration and certainly not as a base for generalized statement. Detailed information of small number data interpretations can be found (in Slovenian) on web site http://www.ris.org/topwww/metodologija.html, where also the methodology of RIS telephone surveys is considered.

For a proper understanding, the standard errors of the estimate (se) are calculated on certain occasions for important estimates. It is to be considered that an ordinary 95 % confidence interval for the proportion P is ± 2*se(p) wide:

$$P = p \pm 2*se(p).$$

It is also important to note, that the confidence interval can be also evaluated by multiplying the estimate with a factor (1 ± 2*CV). While in the analysis we basically deal with estimates *p* of population proportions *P*, we can therefore estimate the 95 % confidence interval as:

$$P = p \pm 2se\ (p), \text{ where is } se(p) = \sqrt{(p(1-p)/n)}.$$

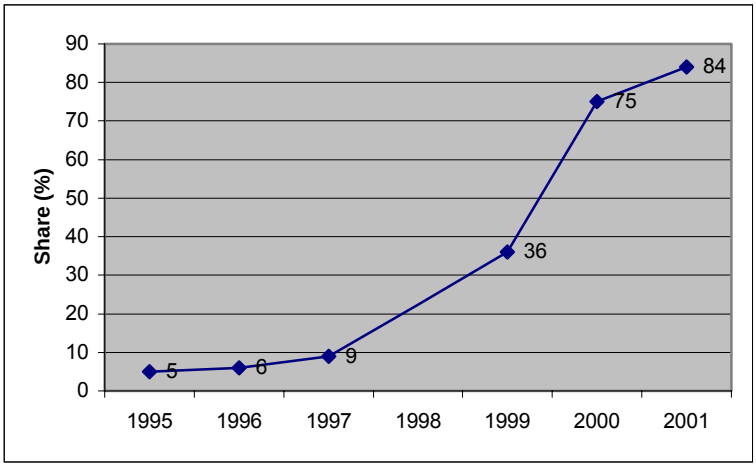
Although some categories when crossed with control variables have a very small number of units and thus the shares (or the averages) are not precisely estimated, only statistical tests can tell the true significance.

However, in this report the confidence intervals and the labels (e.g. brackets) for imprecise estimates are use only for the most important estimates. For other estimates, the precision can be easily estimated with the above calculation of the CV, as the size of the group is always available.

2 BASIC TRENDS

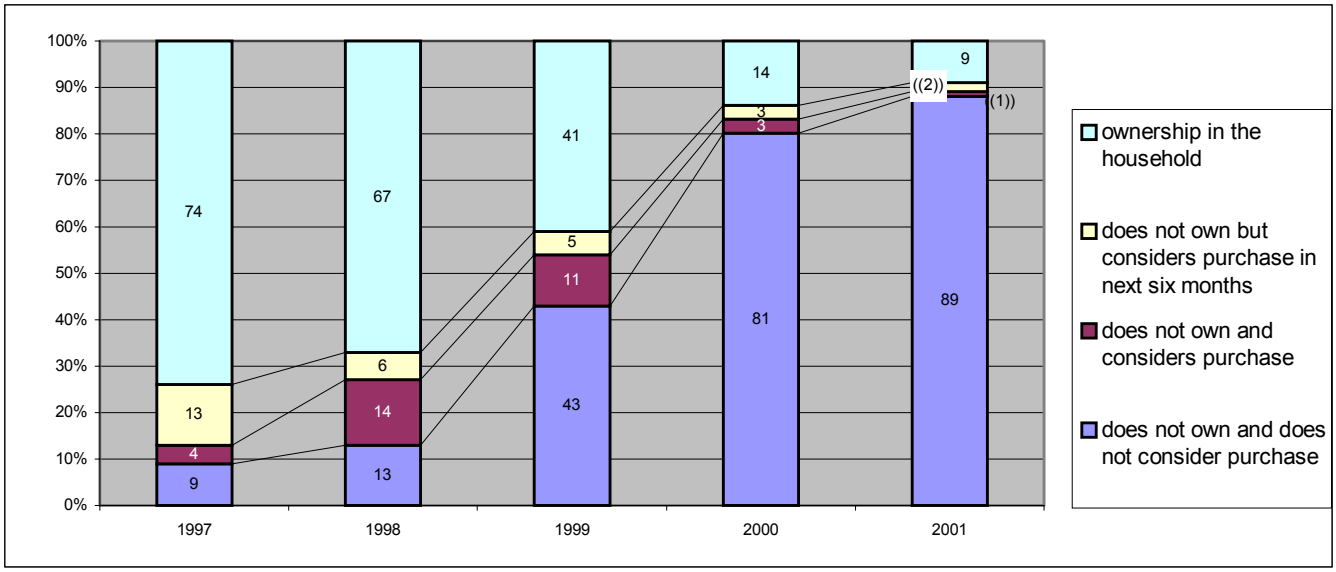
2.1 Mobile telephones among households

First let us take a look at the Slovenian Public Opinion (SPO) data. For the year 2001 the data from RIS were used. In the year 2000 almost three-quarters of respondents have stated that their household owns a mobile phone, what has increased to 84% in 2001 (RIS). The same SPO survey shows that half of adult population (18 and more) personally used mobile phone in the fall 2000.



Graph 1: Increasing share of households with a mobile phone in Slovenia (Source: SPO/RIS)

The graph bellow compares the RIS data on mobile telephones in the years 1997, 1999, 2000 and 2001. In the beginning of December 2000 four-fifth of households (among respondents aged 15 – 65) owned a mobile phone. Additional 6 % were thinking of buying their first mobile phone. Six months later (June 2001) the share of households with a phone has increased, but the share of those who consider buying a phone has decreased. ***Only these findings in this report are related to the population aged 15 to 65,*** but all others findings in the report are related to a target population, aged 10 to 75, where the share of households with a mobile phone is slightly different.



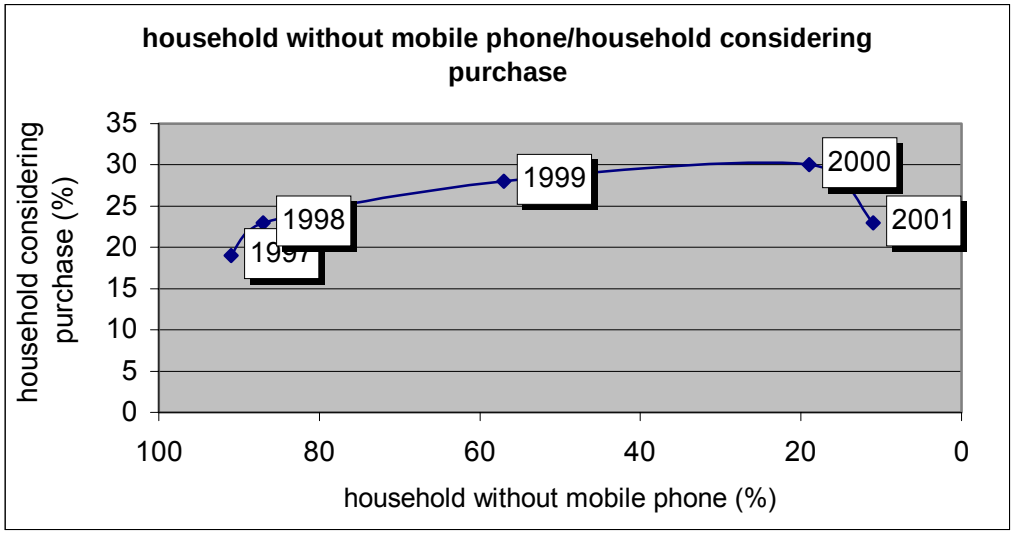
Graph 2: Ownership of mobile telephones from 1997 to 2001 in households (population, aged 15 – 65).

There is a high growth of mobile phone ownership and a decrease of purchase intentions in households, which, in this very graph, is only presented for the households that do not yet posses a mobile phone. Among the latter, the share of those who considered purchase was increasing until the year 2000, but has visibly *decreased* in June 2001. There evidently exists a hard core of non-users that do not consider using a mobile phone.

	1997 (%)	1998 (%)	1999 (%)	2000(%)	2001(%)
Considers buying	19	23	28	30	17

Table 1: Share of households that do not own a mobile phone but consider buying one

If we link the shares in Graph 2 and Table 2, we get Graph 3, where the decrease of households that do not own a mobile phone together with the increase of buying intentions till the year 2000 can be clearly seen. In June the share of households without a mobile phone is getting additionally low, but for the first time we can observe also the declining buying intentions among the remaining non-owners. As we are approaching the saturated level of mobile phone ownership the remaining non-mobile households may become more and more reluctant to purchase the phone.

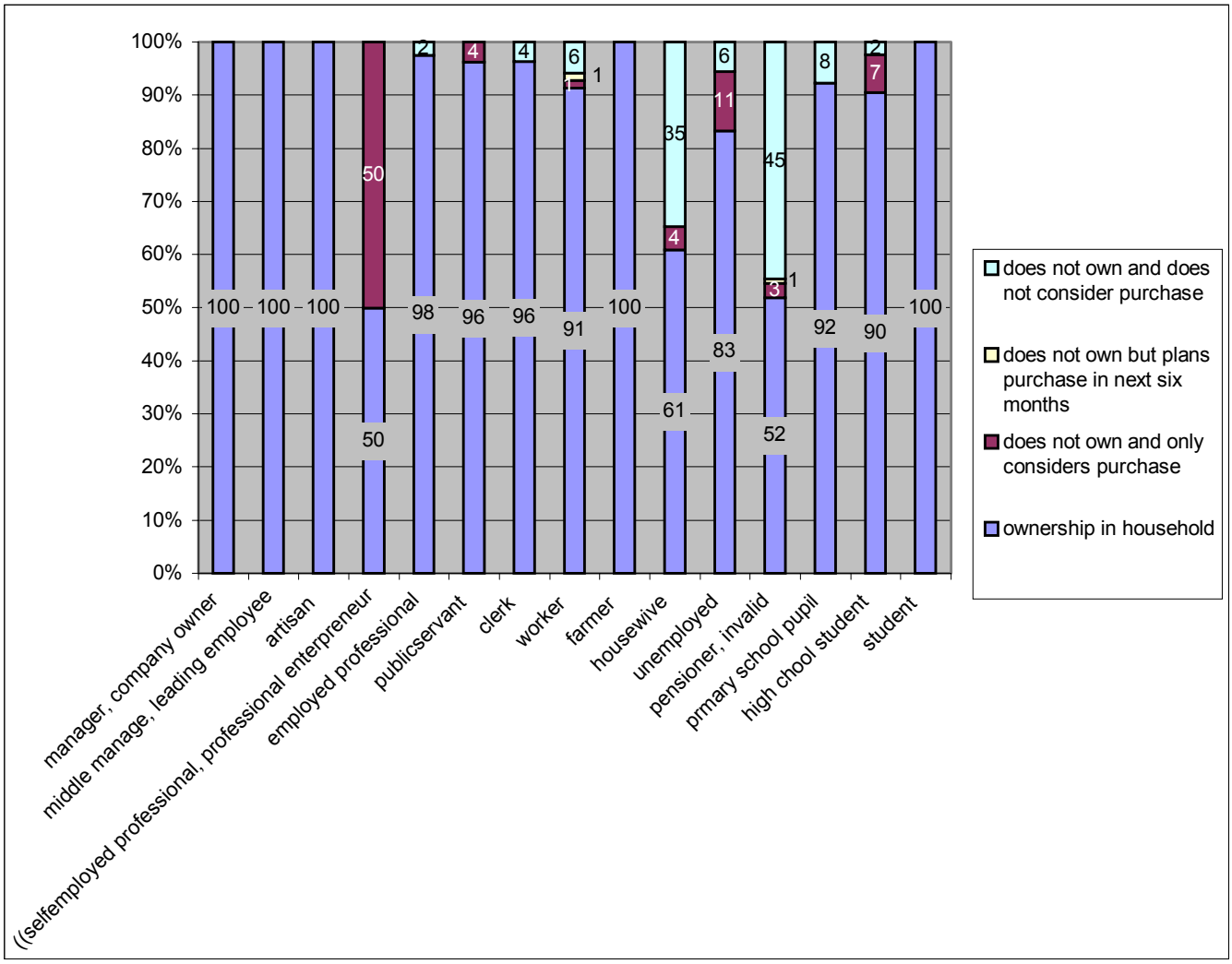


Graph 3: Share of households that do not own a mobile phone regarding to purchase consideration 1997 - 2001

Till the year 2000, the share of households considering purchase was increasing. In the year 2001 just a few households (one-tenth) stays without mobile phone, but these do not consider purchase with the same intensely (just 23% do).

Looking at the employment status structure it is obvious that “non-mobile” households can be found mainly among pensioners or housewives. Some categories of employment status, such as managers, company owners, students etc. have already reached the saturation level in mobile phone ownership.

We should repeat here that the graphs above do not show purchase intentions of the households where somebody already owns a mobile phone.



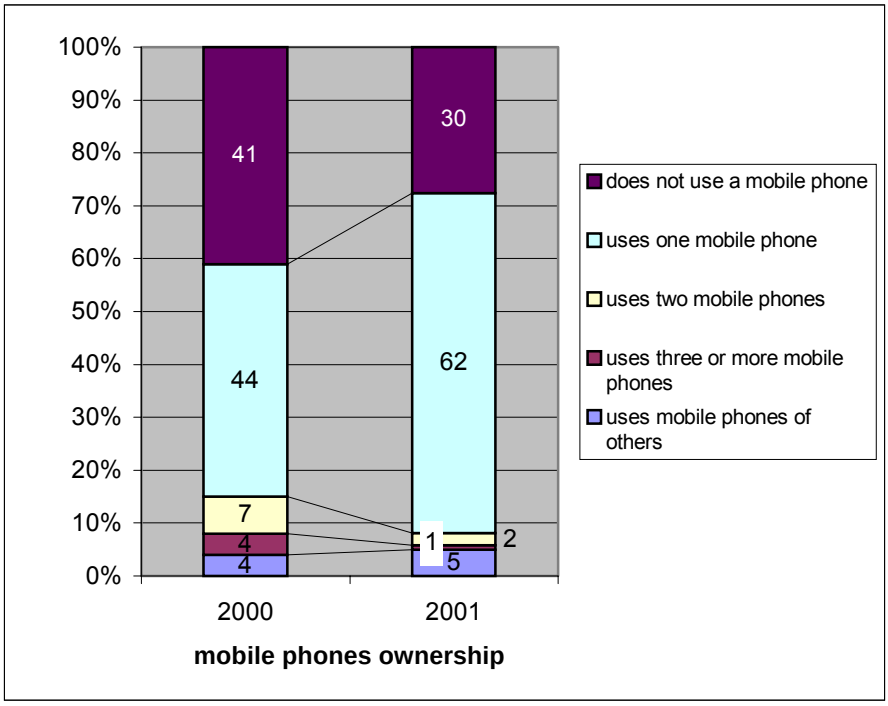
Graph 4: Ownership of mobile phones by employment status

It is to be added that due to a small number of self-employed professionals and professional entrepreneurs their estimate is imprecise - this is specifically marked with two brackets.

2.2 Personal use of mobile phones

Mobile phones are used by 70% of target population, aged 10 to 75. In the past six months the share has significantly increased (from 59% in the year 2000). Approximately 3% of population own more than one mobile phone, which also means that the share of users with two or more mobile phones has decreased.

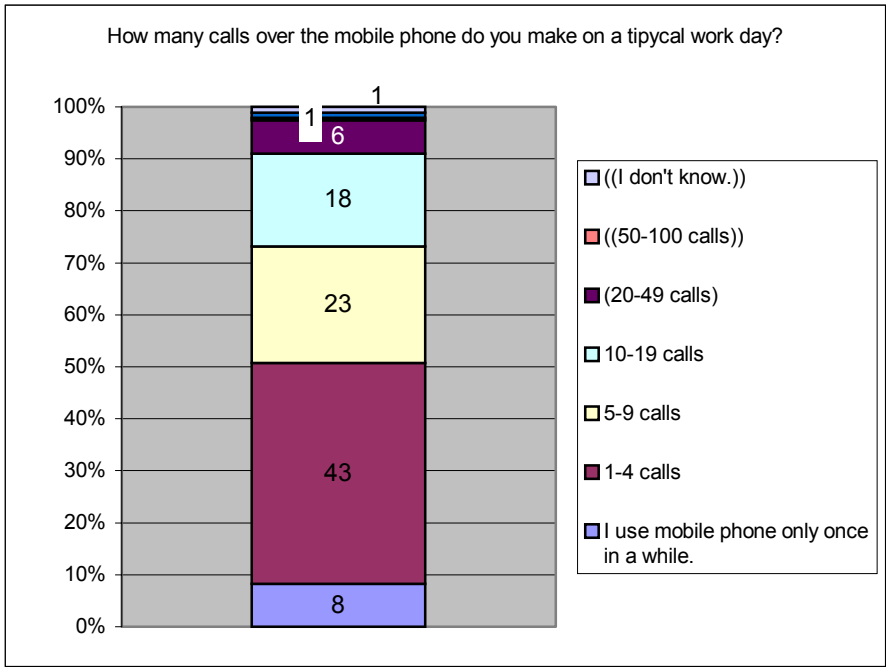
The decrease of users (11 %→3 %) with two or more mobile devices remains mainly unexplained. We can partly explain the decline with the fact that there are numerous new users that usually own just one mobile phone. Thus the share of users with more devices decreases automatically.



Graph 5: Ownership of mobile phones among population, aged 10 to 75 (December 2000/June 2001).

In this graph individuals are observed and not households like in previous graphs. Of course, in the analysis of households we report about individuals that speak about their households' characteristics, which is different from the characteristic of a household itself. Divergences can occur if the smaller households are different from the bigger ones.

Let us take a look at the number of calls made over mobile phone. The majority of mobile phone users are calling about 1- 4 times per day, followed by those who make 5 – 9 calls per day and a smaller share of those who make 10 to 19 calls per day. Other shares are much smaller and also imprecise.



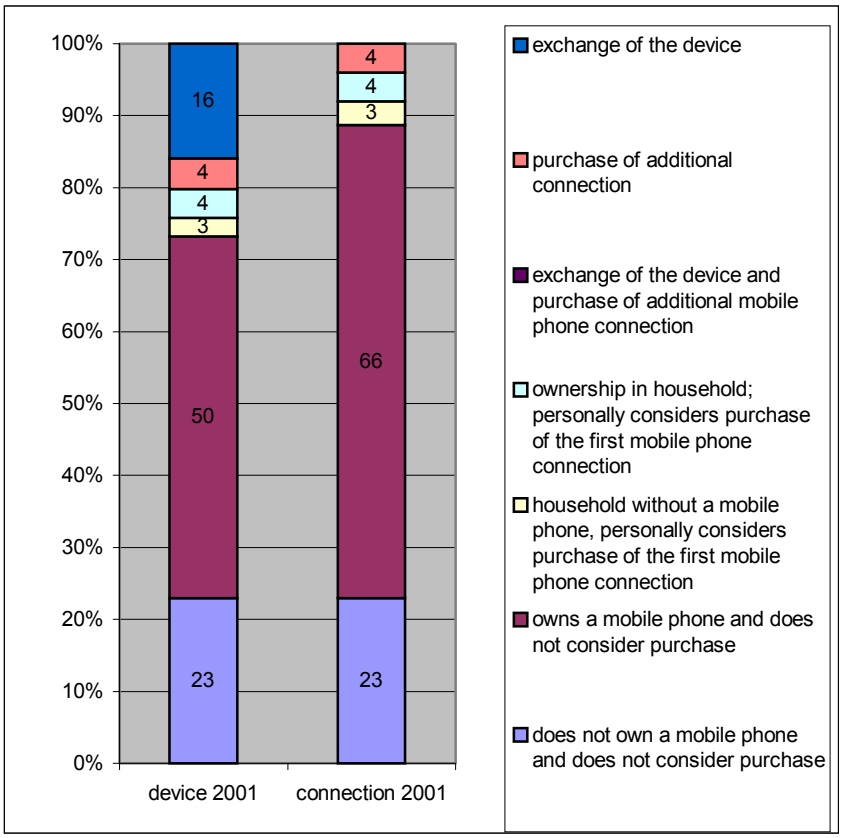
Graph 6: Share of calls over the mobile phone on a typical workday (June 2001)

We have calculated the average number of calls that are being made by mobile telephone user on a typical workday. We have done this by determining a middle value of a category and attributing this value to each unit in the category (for example, we attributed the value 2,5 to those who make 1 – 4 calls per day). On average a mobile telephone user makes 8 calls per day. More about frequency of calls by socio-demographic characteristics can be found in appendix 9.8.

We now observe the questions:" Do you consider to buy a new device?" and "Do you consider to buy a new connection?"

In the following discussion we thus separated the issue of mobile phone connection and the question of mobile phone device.

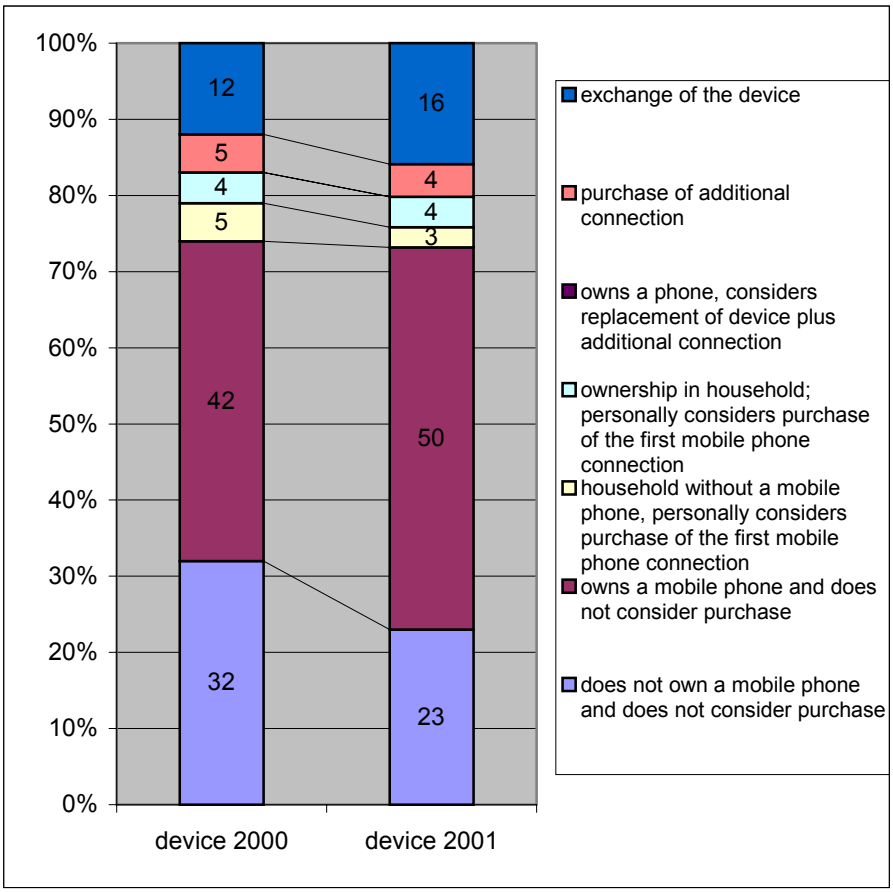
Thus 16% of the target population that already owns a mobile phone is considering replacing it (the device). Similarly, 4 % have a connection and want an additional one. Of course, a new/additional device may not necessarily be new, but may also be a used one, what has not been separated in this very graph.



Graph 7: Consideration to exchange and/or buy the device and/or connection (June 2001).

The differences among columns is, of course, only in 16% of users, which in the first column represent the population of users that are planning only replacement/exchange of the device and not of the connection.

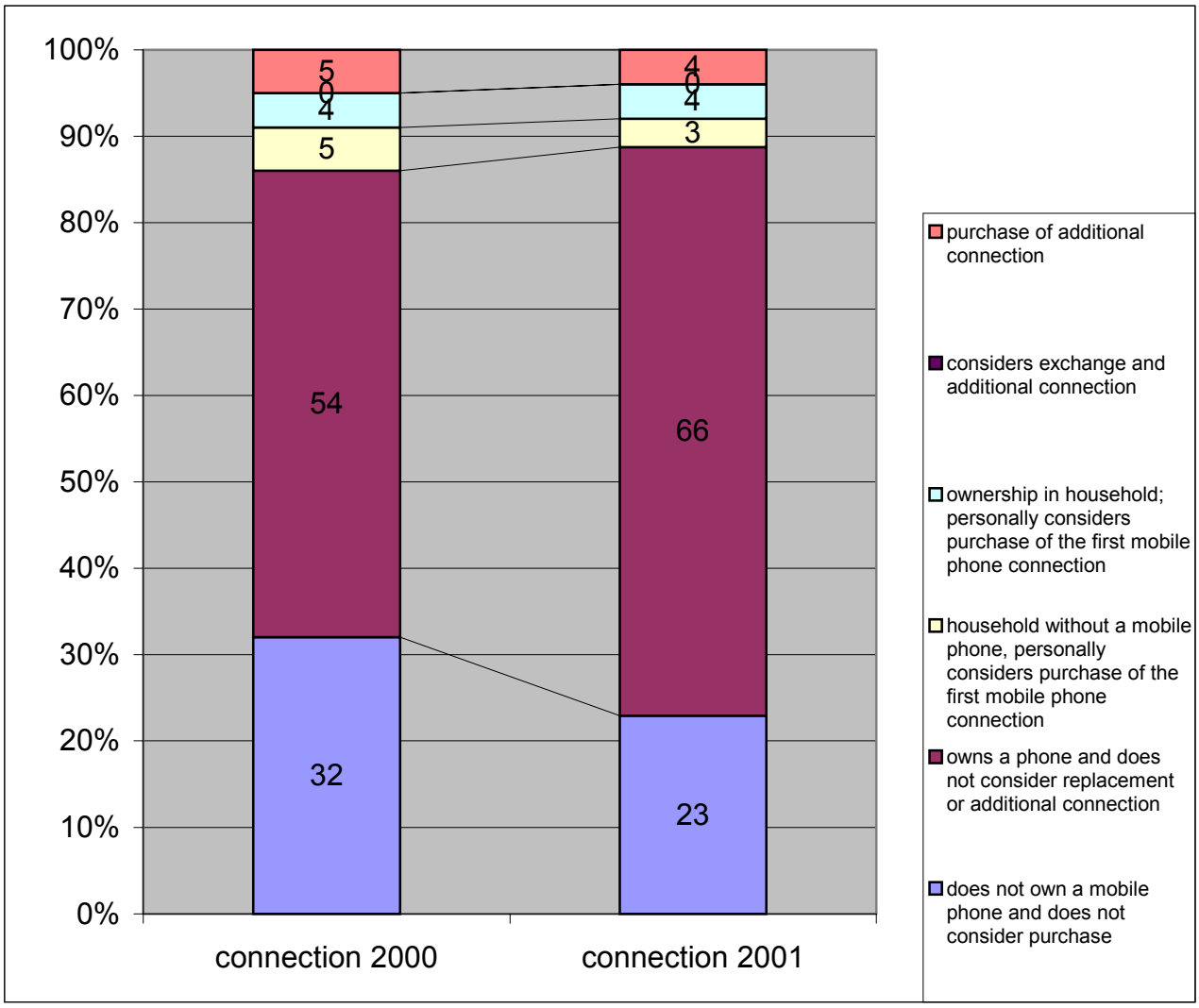
Let us take a look at the differences that appeared in the case of device purchase intentions for next six months. We compare 2000 and 2001 figures. In the graph bellow it can be seen that the share of those who intend to replace/exchange the device has slightly increased. Similarly, the share of those without a mobile phone who do not think to buy one has significantly decreased. Here, the category “owns a phone, considers replacement of device and additional connection” is negligible and thus not seen in the graph.



Graph 8: Users who consider purchasing the device (2000/2001).

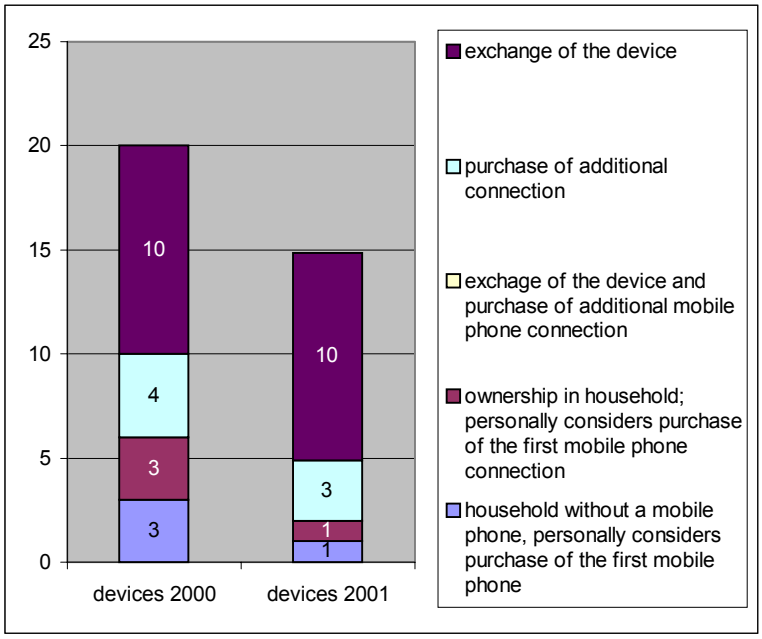
Let us take a look at the differences that appeared in the case of connections in the last six months. In Graph 9 we can see an increase in share of the respondents that already have a connection and are not thinking about new one. The December 2000 predictions of new connections have been transcended in the first six months of the year 2001. Thus in June 2001 there are 11% more persons with a connection.

Similarly, the share of those who have a connection and are not thinking of exchanging or buying a new one has increased for 12 %. In December 2000 there were 9 % of those who have thought of buying their first connection (in households with and without a connection), what dropped to 7% in 2001. Again, those who considered exchange and additional connections are negligible and not seen in the graph.



Graph 9: Users who consider purchasing the connection (December 2000/June 2001).

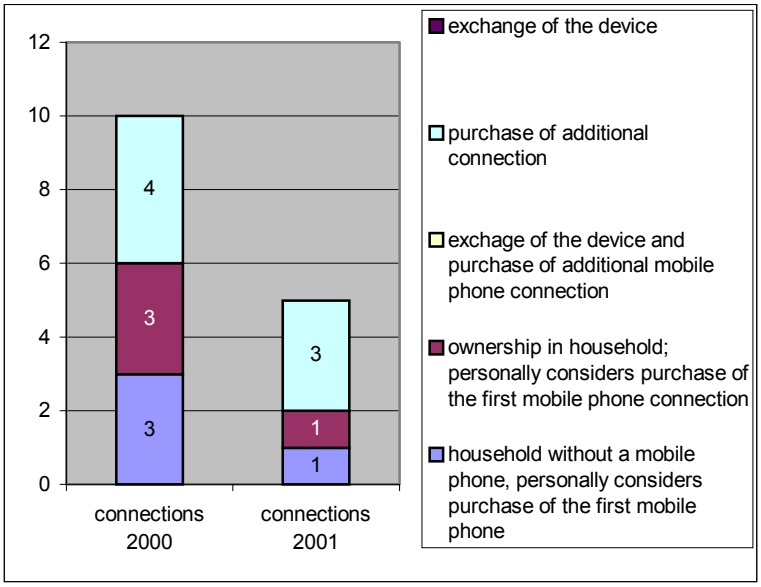
Let us observe those that also intend to perform purchase in next six months. The share of those who consider exchanging the device in the next six months has remained the same (10% of target population), but the share of those who own a mobile phone in household and are personally considering purchase of the first device has decreased (3%→1%). The same goes for the share of those who do not own a mobile phone in household and are personally considering purchase of the first mobile phone with connection (3%→1%).



Graph 10: Users considering purchase of a device in the next six months (June 2001, n=81).

The share of buying intentions for new connections in the next six months has been thus cut in half (10%→5%). The drop of these shares has mostly been a consequence of new mobile phone owners. That is why the purchase intentions of those users that own a mobile phone in a household and are personally considering purchase of their first connection have decreased (3%→1%). Also decreased are the intentions for those who do not own a mobile phone in a household and are personally considering purchase of their first connection (3%→1%).

The purchase intentions for additional connection (and device) among existing users have not substantially changed (4%→3%). We can observe this in both graphs, however, the graph bellow shows only the intentions related to connections.



Graph 11: Users who consider purchasing a connection in the next six months (June, 2001, n=81)

The Scheme 1 on the next page indicates the state of mobile telephones in Slovenia among households and individual users.

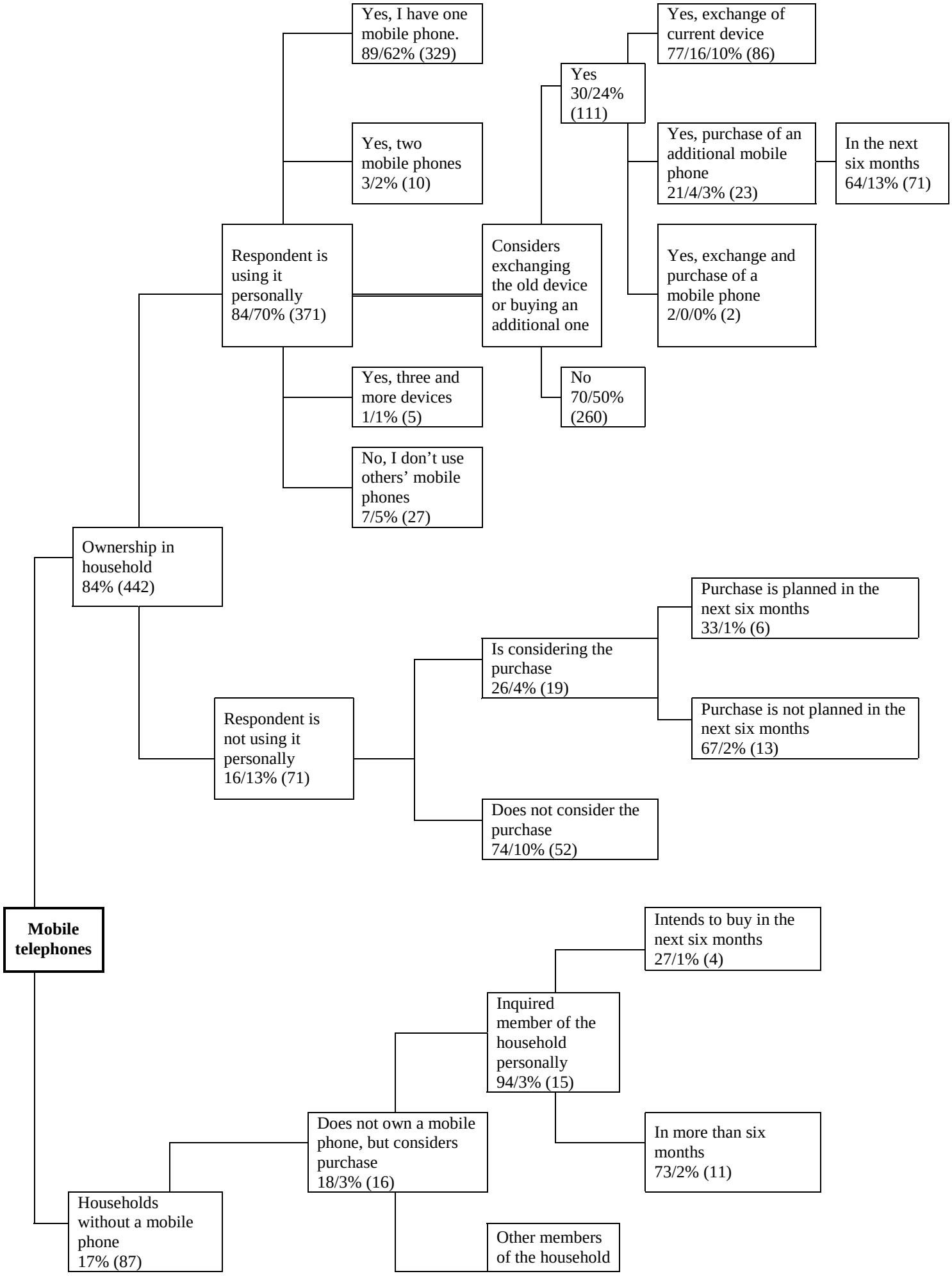
Shares and a number of respondents in an individual segment are stated in the boxes. First number represents the percentage according to previous category; the number following the slash (/) represents the share in target population aged 10 to 75. Sample numerous of this segment is in the brackets.

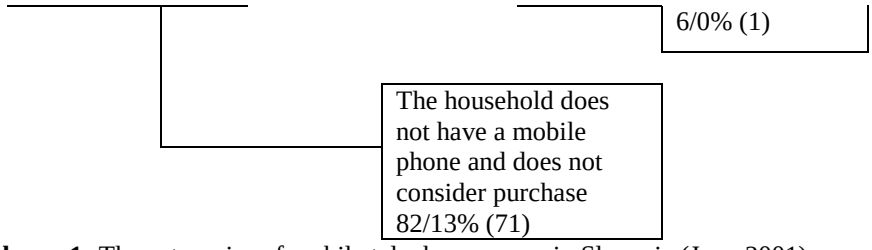
For example, if we take a look at a segment of households without a mobile phone and who are considering purchase:

- number 18 represents a percentage of those who are considering purchase, among households without a mobile phone,
- number 3 behind the first slash represents the percentage of the latter compared to the entire population,
- number in brackets (16) represents a number of units in sample of this segment out of 529 units all together. We can apply coefficient of variation (CV) calculation on this number.

A record thus looks like this: 18/3% (16).

Scheme 1 has been set in the following manner: the units that have dropped out in a certain step have been proportionally divided among the categories of the next step. In appendix (page 88) the Scheme 2, the row numbers and percentages are presented.


Mobile telephones
Ownership in household 84% (442)
Respondent is using it personally 84/70% (371)
Yes, I have one mobile phone. 89/62% (329)
Yes, two mobile phones 3/2% (10)
Yes, three and more devices 1/1% (5)
No, I don't use others' mobile phones 7/5% (27)
Considers exchanging the old device or buying an additional one
Yes 30/24% (111)
Yes, exchange of current device 77/16/10% (86)
Yes, purchase of an additional mobile phone 21/4/3% (23)
In the next six months 64/13% (71)
Yes, exchange and purchase of a mobile phone 2/0/0% (2)
No 70/50% (260)
Respondent is not using it personally 16/13% (71)
Is considering the purchase 26/4% (19)
Purchase is planned in the next six months 33/1% (6)
Purchase is not planned in the next six months 67/2% (13)
Does not consider the purchase 74/10% (52)
Households without a mobile phone 17% (87)
Does not own a mobile phone, but considers purchase 18/3% (16)
Inquired member of the household personally 94/3% (15)
Intends to buy in the next six months 27/1% (4)
In more than six months 73/2% (11)
Other members of the household



Scheme 1: The categories of mobile telephones users in Slovenia (June 2001);

Respondents in total thus consider:

i. Purchase of a new mobile phone connection: 11% of target population, among those 5% in next six months;
    a. 7% of target population, that do not yet have a connection, among those 2% in the next six months;
    b. 4% of target population (already have a connection), among those 3% in the next six months;

ii. Purchase of a new additional device: 27% of target population, among those 15% in the next six months;
    a. 11% consider purchasing first/additional connection/device, among those 5% in the next six months
        - 7% of target population, that do not yet have a connection, among those 2% in the next six months;
        - 20% of target population (already have a connection), among those 13% in the next six months;
    b. 16% considers exchanging a device, among those 10% in the next six months.

Comparison with December 2000:

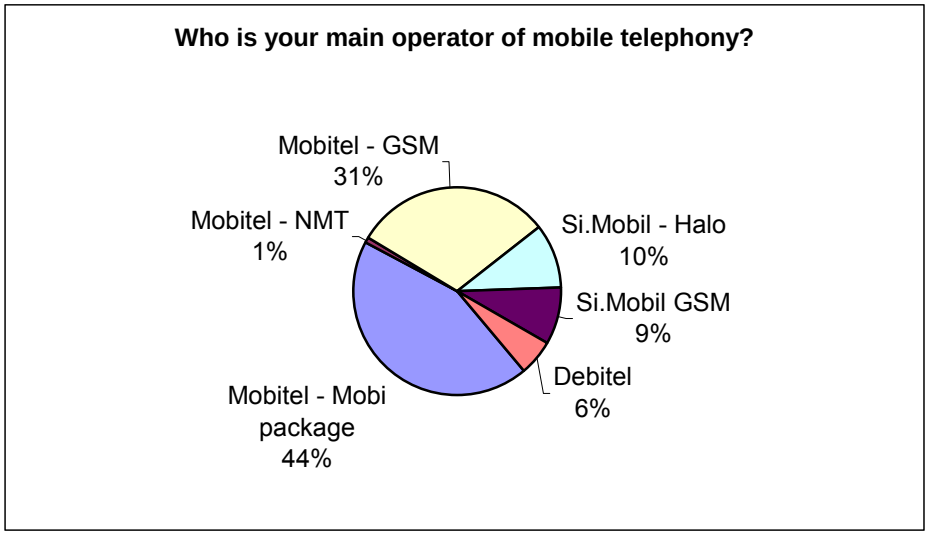
- The comparisons with December 2000 show that the predictions regarding the connection were dramatically exceeded. Thus six months ago 6% of population considered purchase of their first connection in six months, but in June there were 11% (±3%) more connections. The share of population that does not yet own a connection is thus down for 11%, although six months ago there were only 6% of those who (in this population) planned purchase of the connection in the next six months and 9% of those who were considering the same, what includes 6% purchase.

- The predictions regarding the devices were basically realized. In December 2000 around 20% of target population considered purchasing a new device in six months, while in June 2001 around 17%(±3%) of target population reported the purchase of the main mobile device in last six months or less. However, the structure is different.

3 OPERATORS OF MOBILE TELEPHONES

3.1 Market shares of operators

In this chapter we are talking about the operator on the main mobile device. Three-fourths of respondents are users of Mobitel's services. The majority of users are subscribers to Mobi package. The share of Mobitel – GSM users has somewhat decreased in last 6 months, but the share of Si.Mobil – GSM has increased significantly.



Graph 12: Share of respondents by mobile telephones operators (June 2001).

Operator – package	Share 2000 (%)	Share 2001 (%)
Mobitel - Mobi package	42	44
Mobitel – NMT	0,4	1
Mobitel – GSM*	39	31
Si.Mobil – Halo	10	10
Si.Mobil GSM*	4	9
Debitel	5	6
Total	100	100

Table 2: Share of respondents by the use of mobile telephone package or operator (December 2000/ June 2001) The difference of shares is statistically significant at the rate $p<0,01$ with shares marked with *.

Of course, the decrease of shares does not mean also the decrease in absolute number of subscribers. Due to the growth of mobile telephones the operators could also increase the absolute number of subscribers despite the declining share.

Based on these results we can estimate the absolute number. We estimate that in Slovenia there are more than 1,200,000 mobile phone connections, which of course already include the devices of users with one, two or three mobile phone connections. Based on these estimates there are also around 1,1 million Slovenians with their personal a mobile phone.

In comparing with the operators' data it is necessary to take into consideration that telephone survey use a statement from the respondents, while the estimates of operators are based on technical calculations with some arbitrary parameters. Specifically, very ambiguous definitions differ among active and non-active or temporary non-active devices. There thus exists certain differences among operators regarding the length of inactivity (in months) needed to declare a certain subscriber as non-active. The estimates based on sample, on the other side, include sampling error (se), which– this time due to relatively small sample – generates a wide confidence interval (in both direction and for the entire population) approximately ± 66,000 for connections and ± for 68,000 respondents. In the case of smaller segments the interval is of course narrower.

Operator - package	**Number of connections 2000**	**Number of persons 2000**	**Number of connections 2001**	**Number of persons 2001**
Mobitel - Mobi package	496,000	390,000	513,000	483,000
Mobitel – NMT	•5,000	•4,000	•10,000	•10,000
Mobitel – GSM	472,000	371,000	364,000	343,000
Si.Mobil – halo	120,000	94,000	115,000	108,000
Si.Mobil – GSM	45,000	35,000	104,000	98,000
Debitel	54,000	42,000	68,000	64,000
Total	1,191,000	936,000	1,174,000	1,106,000

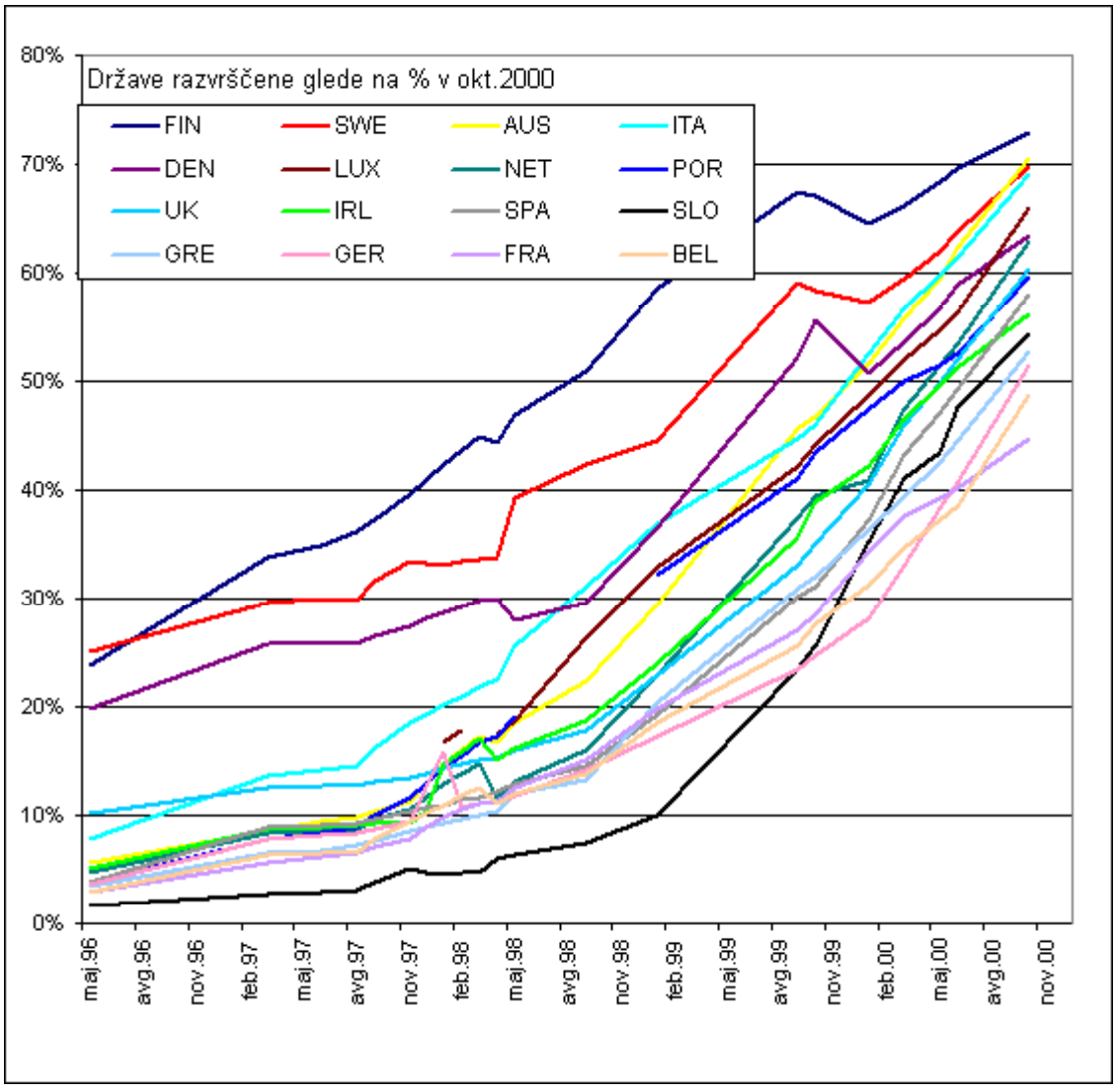
Table 3: The estimate of number of mobile phone connections and number of persons with mobile phone in Slovenia (December 2000/June 2001).

The table above indicates that Si.Mobil GSM has significantly increased its share in six months. Other differences are not statistically significant, which especially relates to the estimate of Mobitel – NMT.

The previous estimates can be compared to the official graph CMI, http://www.ris.org/ict/index.htm.

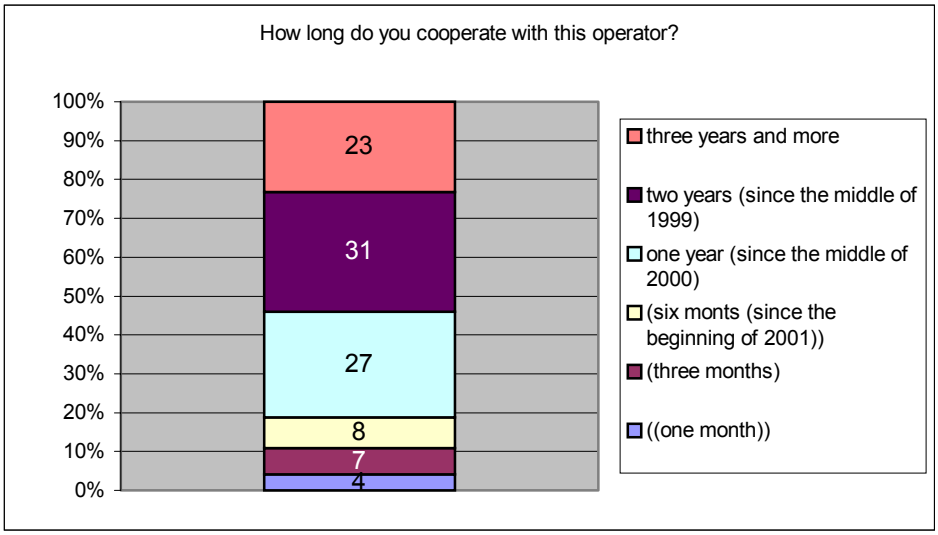
The black line that has long been behind the other countries and begun to rise in 1999 represents Slovenia. It is seen that at the end of 2000 Slovenia has over-passed only four EU countries regarding the penetration of mobile telephones.

Although the data show the state in October/November 2000, it can still be observed that the continuation of EU trends brings Slovenia to a level of 70% in the middle of the year 2001.



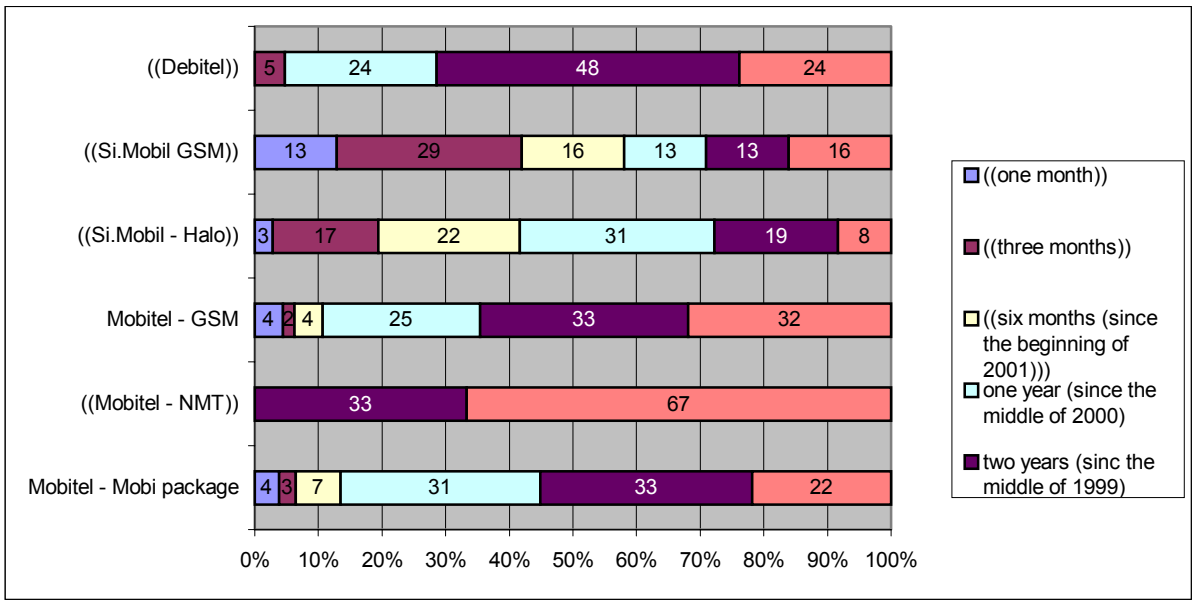
Graph 13: Number of connections by population number. Source: Mobile Communications International.

The graph bellow indicates the length of cooperation with an operator. Approximately one-fifth of respondents has a certain operator for six months or less, others longer; approximately 30% have an operator for about a year and similar share of respondents has an operator for two years. Only about one-fourth of users has a mobile telephones operator for three or more years.



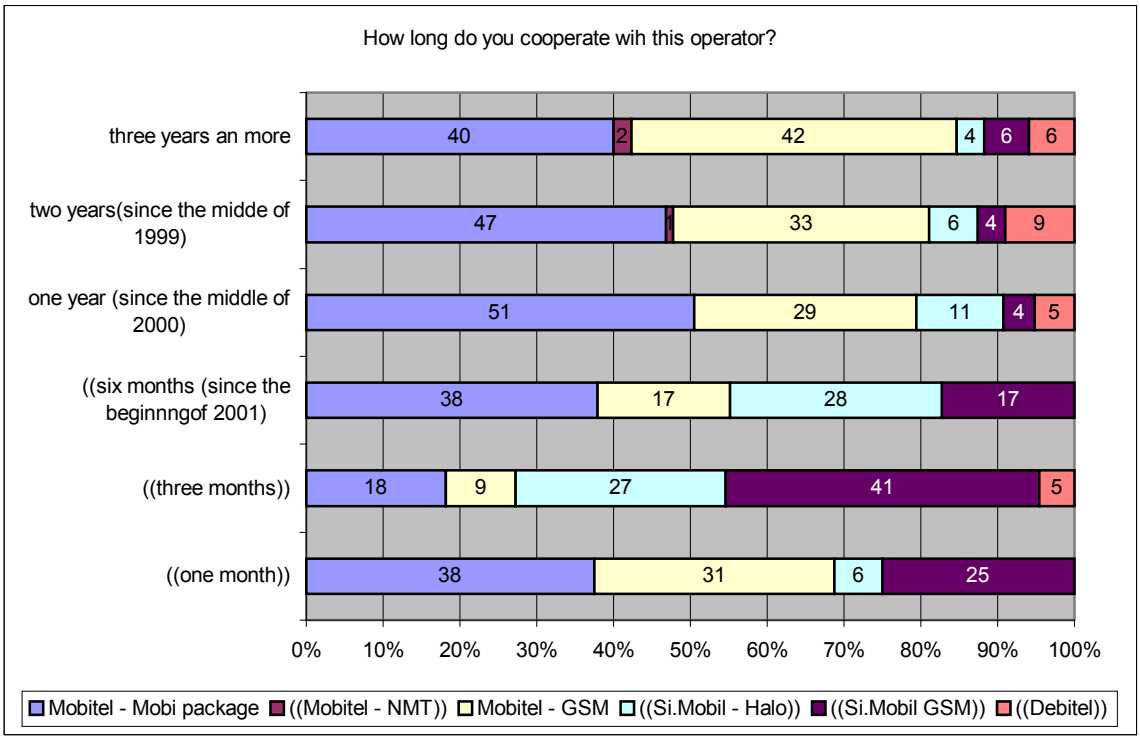
Graph 14: The length of package/operator usage for the main mobile device (June 2001).

Graph 14 shows how long do mobile telephone users use a certain operator. The majority of Si.Mobil GSM package users have it for six months or for the last three months.



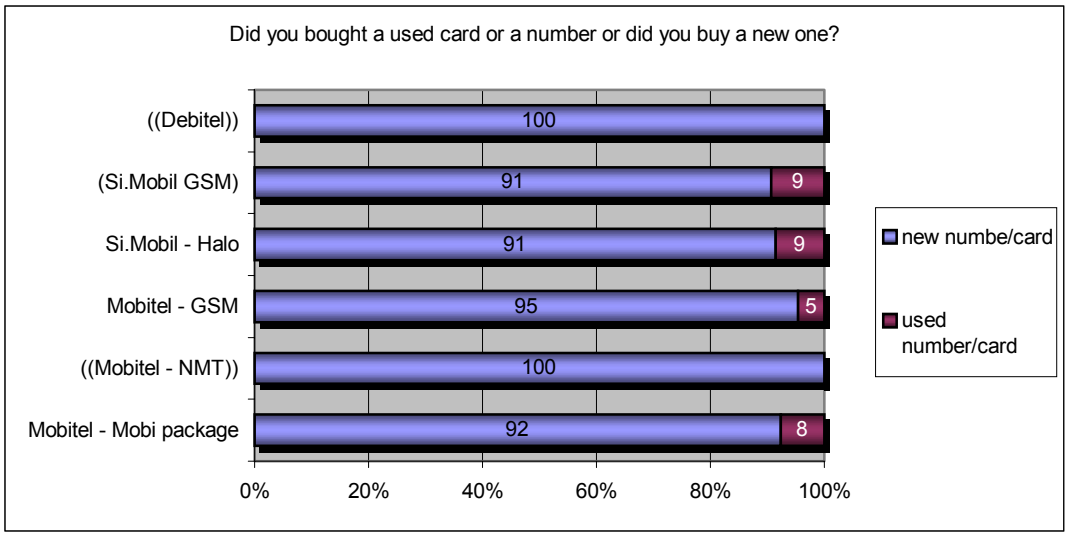
Graph 15: Shares of mobile phone usage length by the operator (June 2001).

Graph bellow shows shares of specific packages of mobile operators' according to the beginning of their use. The largest share of users that use a certain package/operator for three or more years have Mobitel – Mobi and Mobitel – GSM. Lately, there is a considerable increase of Si.Mobil packages share. Particularly those who use a certain operator for six months or less are mostly using the Si.Mobil's packages. Some of the respondents have stated that they own Si.Mobil – Halo package for three and more years, but it is likely to be a mistake in response, since the package does not exist this long.



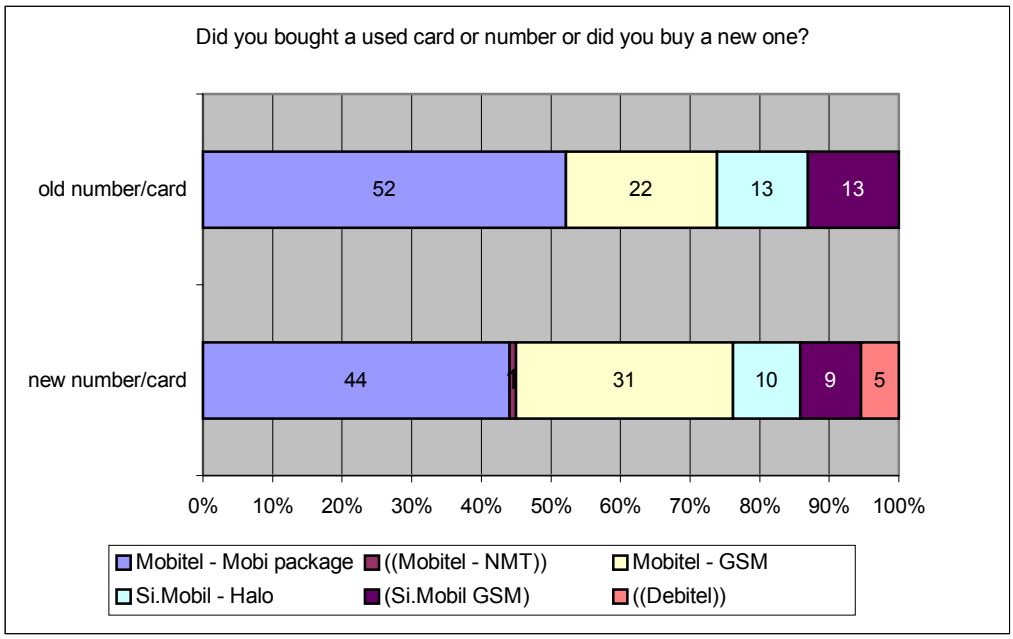
Graph 16: Share of individual packages of mobile operators by the length of mobile phone ownership (June 2001).

The majority (on average 94 %) of the respondents purchased also a new number/card when buying a new mobile phone connection.



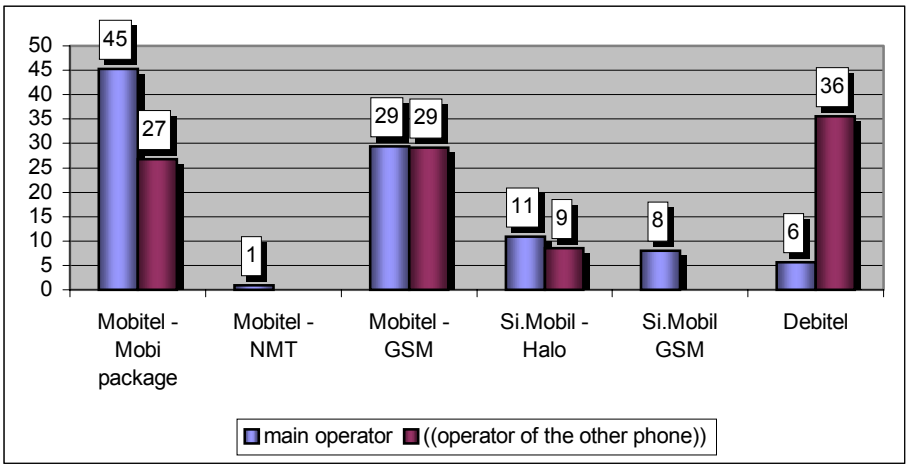
Graph 17: Share of old/new numbers or cards by a mobile telephone operator's package (June 2001).

The biggest share of those who have bought a used card (6 %) has Mobitel – Mobi, followed by Mobitel – GSM, Si.Mobil – Halo and Si.Mobil – GSM. Shares of new numbers or cards by mobile operators' packages are basically the same as shares that a certain package holds on the market.



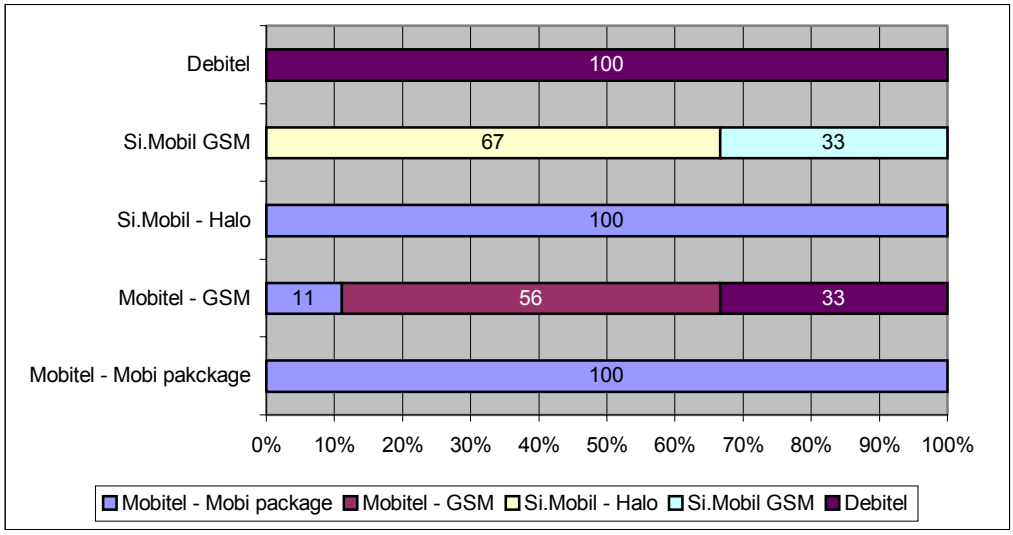
Graph 18: Share of packages/connections according to old or new card/number (June 2001).

The graph bellow shows shares of respondents that own two mobile phones. There are no substantial differences between main operator and the operator on the second phone. Smaller share on the second phone has Mobitel – Mobi, while Debitel holds the biggest share as an operator of the second phone. Shares of other operators are not precise due to a small number of units.



Graph 19: Shares of mobile telephones operators among the respondents that own two phones (June 2001).

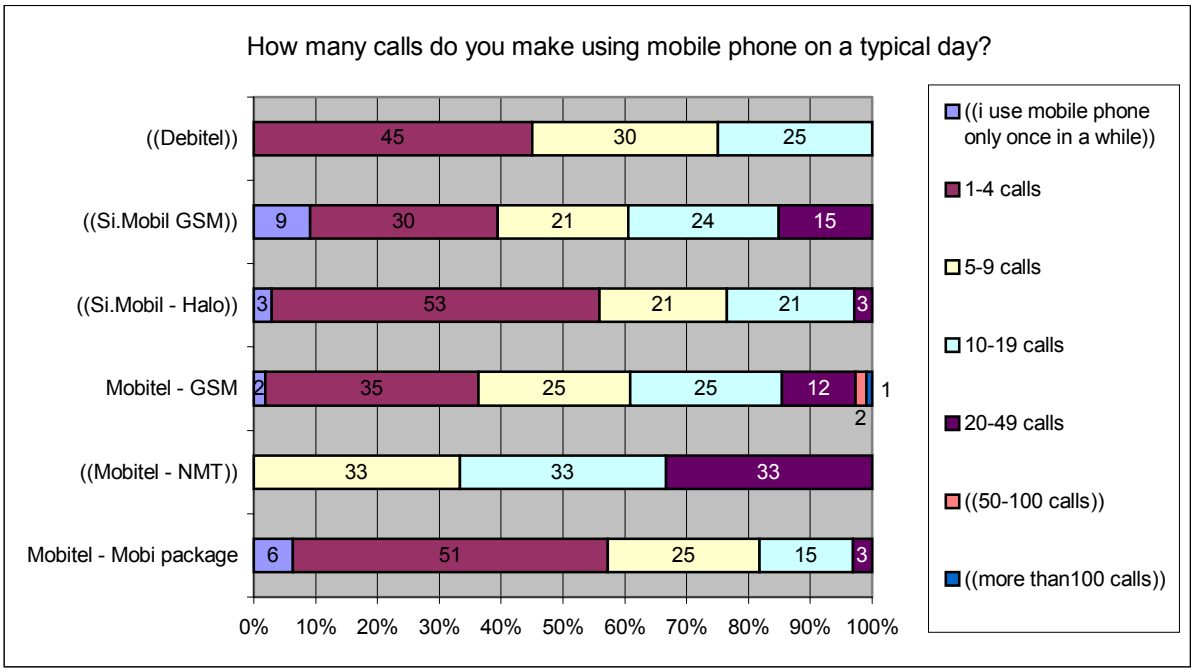
The following graph shows shares of operators of the second mobile phone according to the operator of the first phone. It can be seen that the majority of users that use on the first phone Mobitel's or Debitel's GSM subscription also use the same package on the other phone. It is noticeable that the respondents who use services of one operator on the first phone in most cases use the same operator, but different user package, on the other phone. Thus, for example, two-thirds of users of Si.Mobil – GSM package use Halo package on the other phone and one-third use the same package. Shares can be used merely for illustration, as the number of units is small.



Graph 20: Shares of mobile telephone operators on the second hand phone among respondents that own two phones, by the mobile operators' package on the main phone (June 2001, n=20).

The graph bellow shows the number of calls that users of specific mobile operators' packages make on a typical day. The majority of users make 1-4 calls on a typical day. Over 20 calls per day are made by only a small part of users, mostly by users of subscription packages.

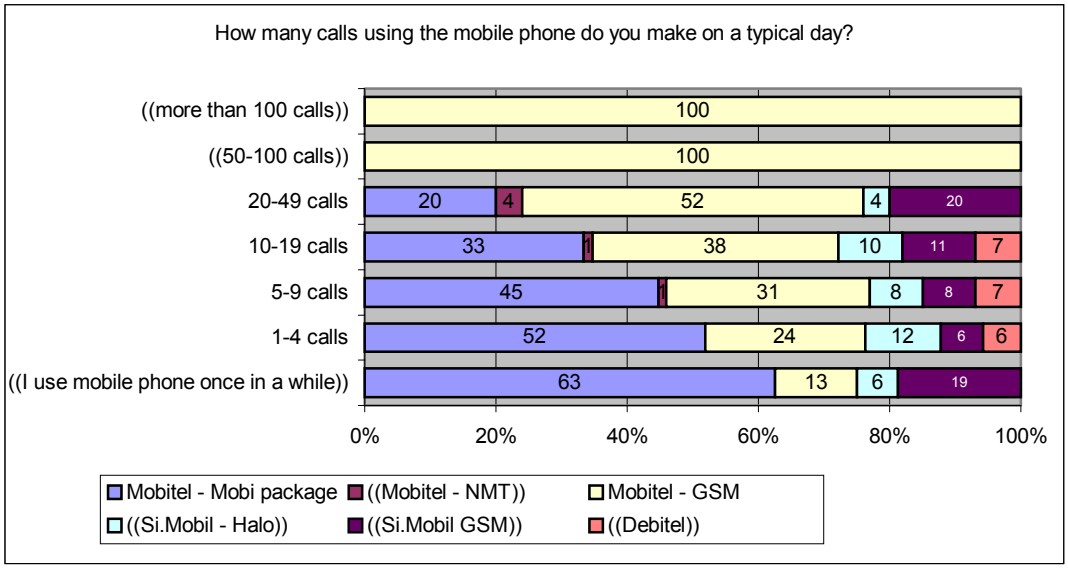
It can be noticed that the Mobitel NMT stands out for its frequency of calls, which is understandable, due to its cheap tariff. On the other hand, both subscription packages are somewhat less intensively used.



Graph 21: Share of daily calls by mobile telephones operator (June 2001)

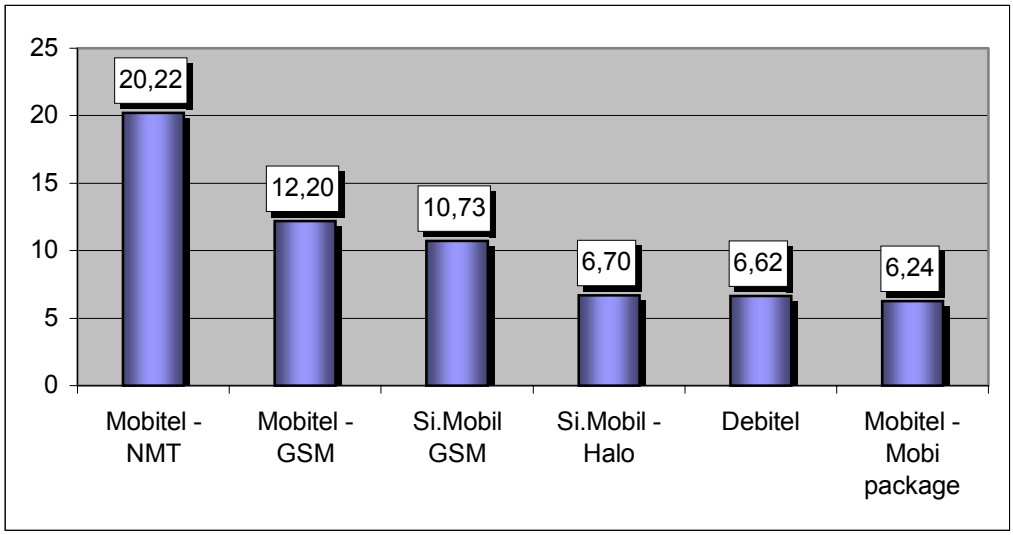
The prepaid packages (Halo, Mobi) are even less intensively used. Here, by a call we understand one session, e.g. mobile phone conversation, regardless of the fact if it was incoming or outcoming call.

The following graph shows shares of a specific operator by the frequency of calls on a typical day. As the frequency of calls increases, the use of pre-paid packages drops on the account of subscription packages. The respondents that make the most calls (over 50 per day) are users of Mobitel – GSM. It can also be seen from the graph that the Mobitel package users in total make 75% of all daily calls, the Si.Mobil package users make about 20% of all daily calls and the Debitel's users about 6% what roughly corresponds to their basic market share.



Graph 22: Shares of packages by the frequency of calls (June 2001).

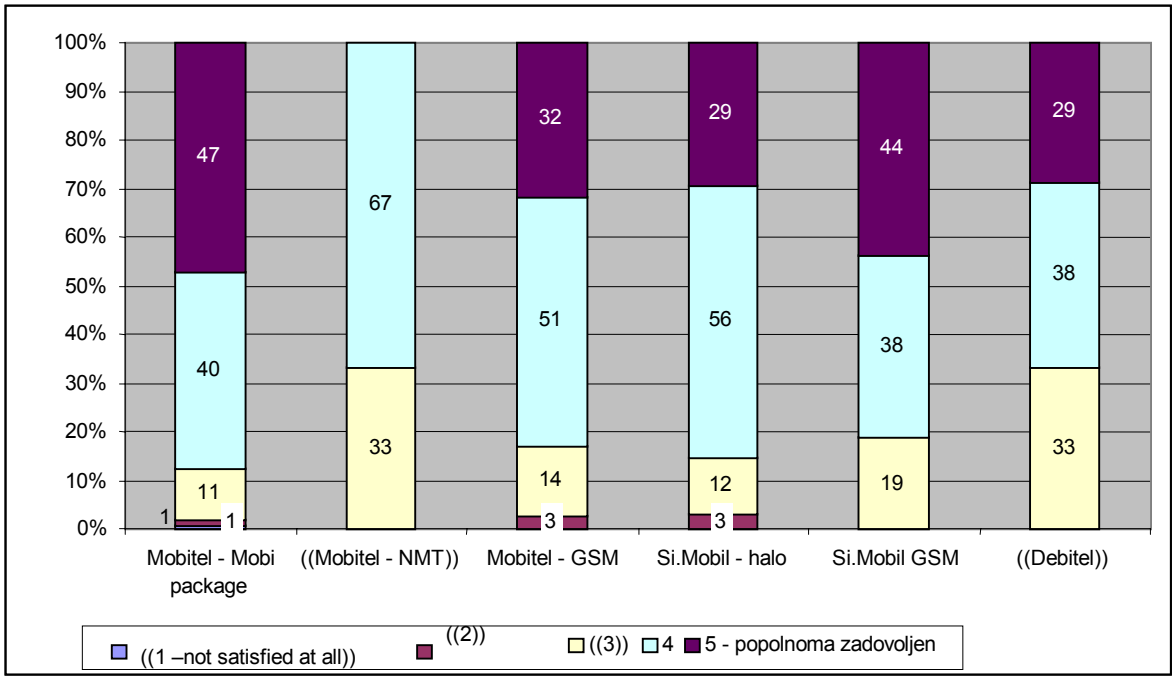
The graph bellow shows the average number of calls on a typical day by the package of the mobile telephone operator. It can be seen on a graph that Mobitel – NMT users make more calls than users of Debitel and Mobi package (the difference is statistically significant). Users of other packages make approximately the same number of calls, in average 8 calls.



Graph 23: Average of daily conversations by mobile operators' package (June 2001).

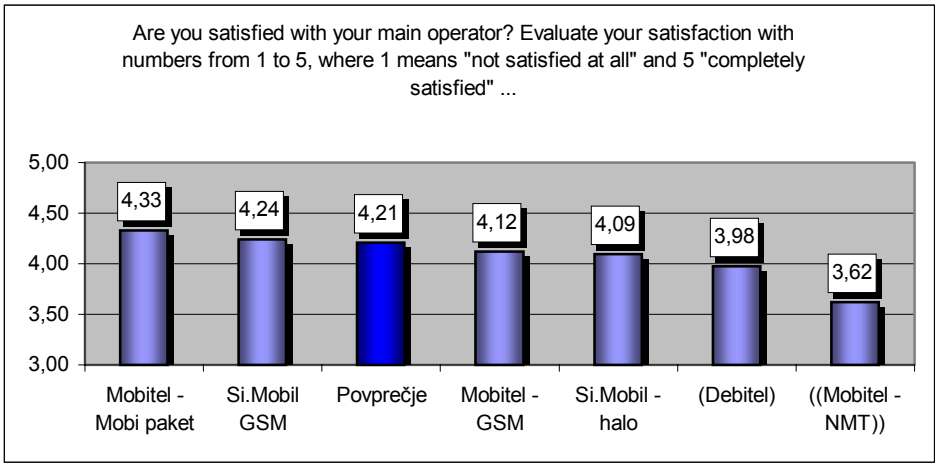
3.2 Satisfaction with the operator

Satisfaction with mobile operators is “in total" very high. On the scale form 1 to 5, where 1 means “not satisfied at all” and 5 “completely satisfied”, the average estimate is 4,21. Furthermore, almost half of Mobi and Si.Mobil – GSM package users are completely satisfied with their operator.



Graph 24: Satisfaction with specific mobile operator packages (June 2001).

Satisfaction of respondents with different operators or mobile telephone packages does not differ significantly. Mostly, the users are satisfied or very satisfied. However, Mobi package users are more satisfied than Mobitel – GSM users and Debitel's users (t-test; $p<0,05$). However, this may be also due to the specific structure of those users (i.e. younger).

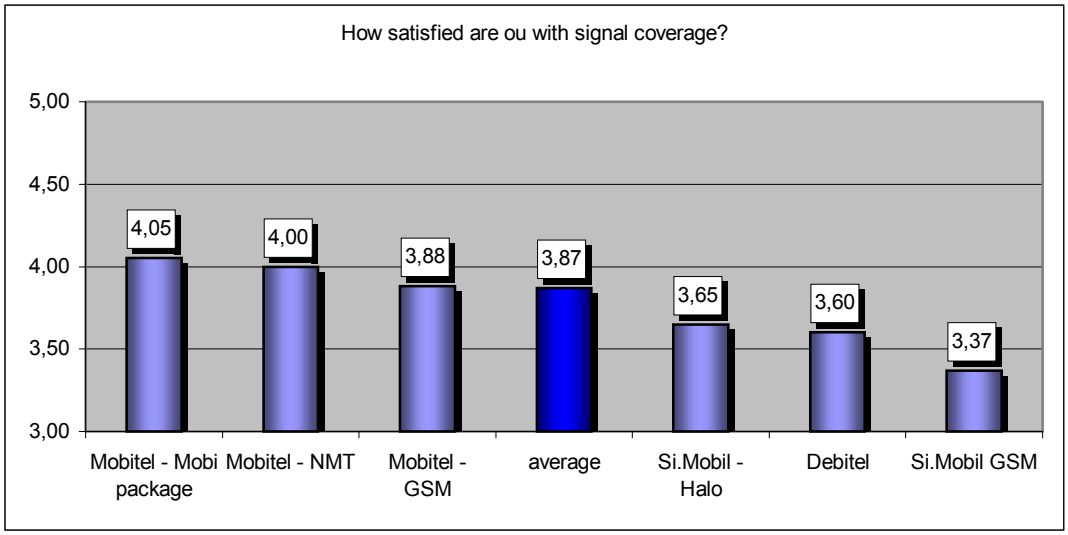


Graph 25: Satisfaction in total with specific packages of mobile telephone operators – averages (June 2001).

	Average 2000	std. error	n	**Average 2001**	**std. error**	**n**
Mobitel - Mobi package	4,19	0.03	511	4.33	0.06	154
Si.Mobil GSM	4,19	0.18	44	4.24	0.14	26
Average	**4,18**	**0.02**	**1226**	**4.21**	**0.04**	**339**
Mobitel – GSM	4,22	0.03	487	4.12	0.07	100
Si.Mobil – Halo	4,07	0.08	125	4.09	0.13	37
Debitel	4,09	0.12	55	3.98	0.18	19
Mobitel – NMT	3,81	0.49	5	3.62	0.33	3

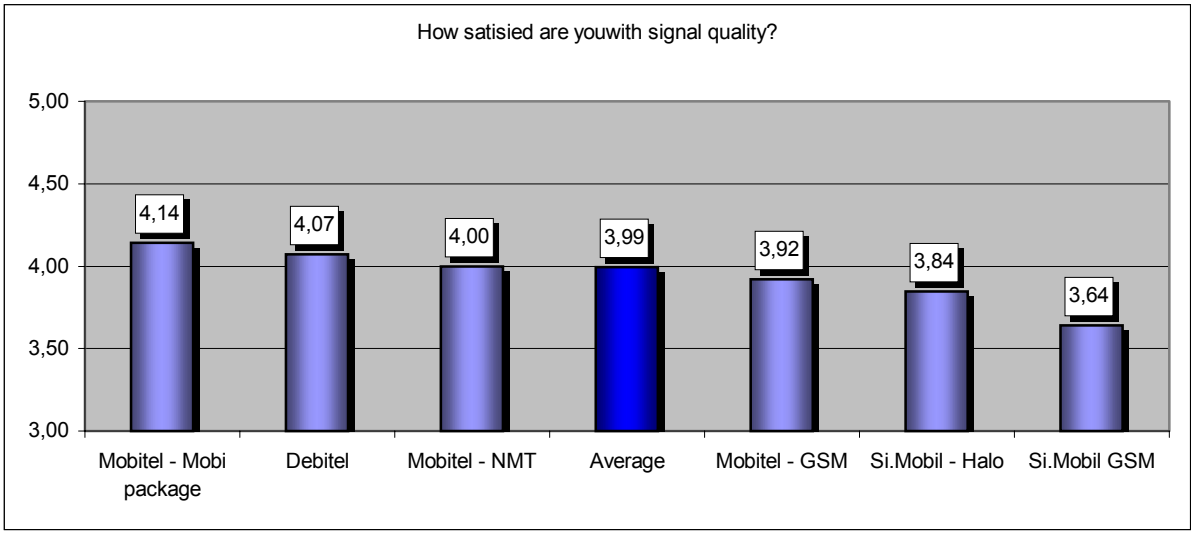
Table 4: Satisfaction in total with packages of mobile telephone operator – averages (November 2000/June 2001).

The graph bellow shows the satisfaction with signal **coverage** according to specific packages. Here, the estimated differences between Mobitel's package users on one hand and Si.Mobil – GSM users on the other are statistically significant. The latter are less satisfied with signal coverage than the first.



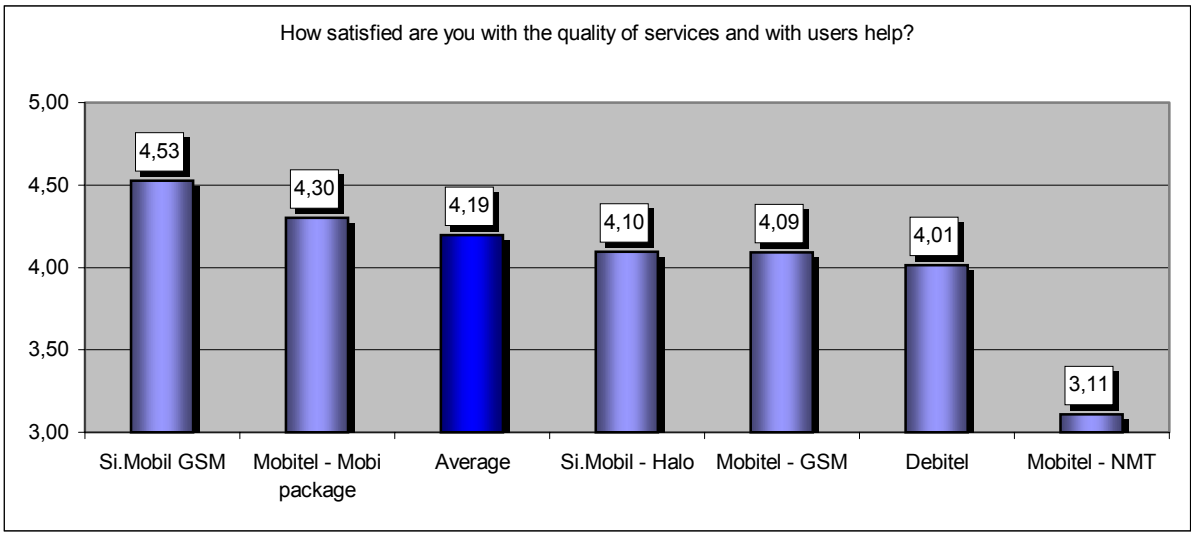
Graph 26: Satisfaction with signal coverage by mobile telephones operator – averages (June 2001).

The following graph indicates the estimate of satisfaction with signal **quality**. In total this estimates are high. The Mobi package users are more satisfied than Si.Mobil - GSM users (the difference is statistically significant).



Graph 27: Satisfaction with signal quality by mobile telephones operator, averages (June 2001).

The satisfaction of users with the quality of services and with the users' help is shown in graph 17. The analysis has shown that the differences between the averages are statistically significant. The Si.Mobil – GSM users are the most satisfied with the quality of services and users help, while Mobitel – NMT users are the least satisfied. Again, deeper analysis may reveal, that the Si.Mobil – GSM users are more positive due to some other reasons.



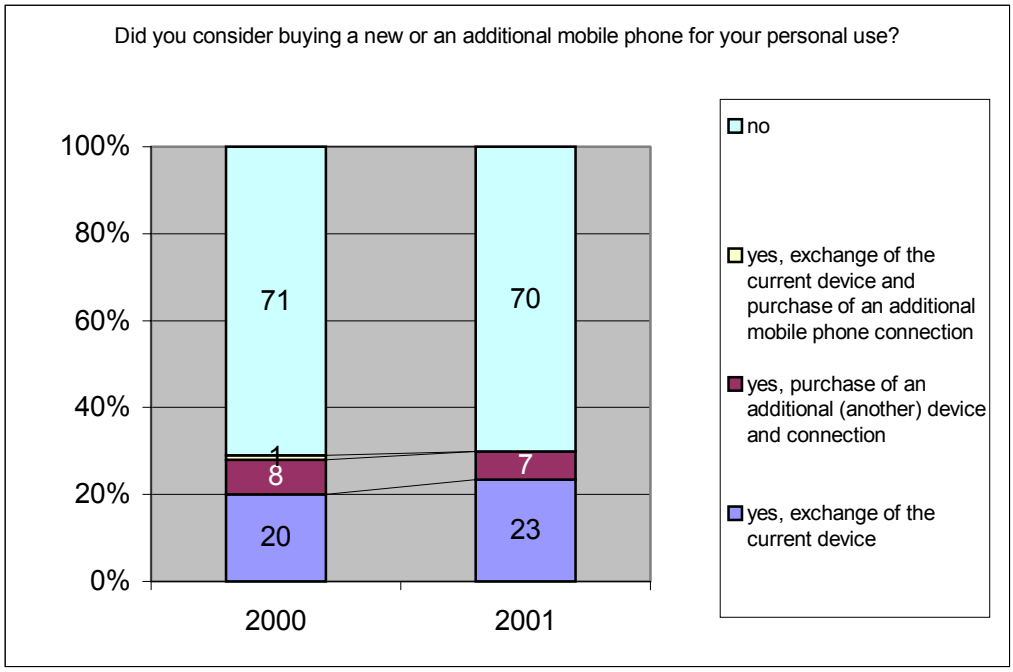
Graph 28: Satisfaction with the quality of services and users help by mobile telephones operators' packages (June 2001).

It is to be emphasized that the above differences may arise from the different structure of the population. Thus, a bigger share of men, which are usually more critical, automatically means lower satisfaction. Some estimates of satisfaction for specific segments are in appendix.

4 BUYING INTENTIONS REGARDING THE SUPPLIER (CONNECTION/PACKAGE)

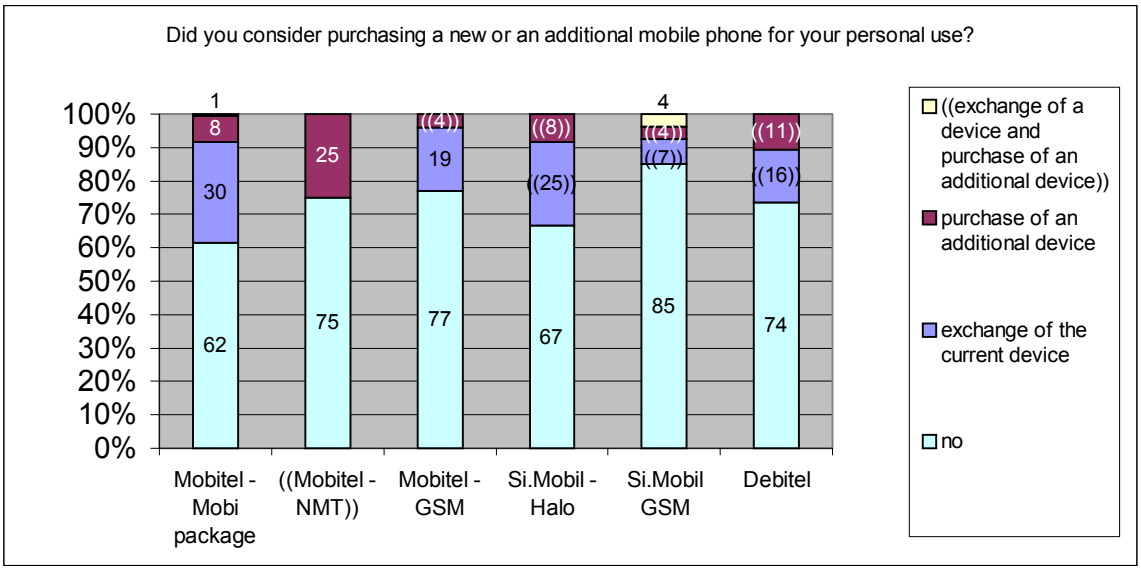
4.1 Mobile telephone users

We will first take a look at persons who already use a mobile phone. Almost a third of mobile telephone users is considering exchanging a device and/or buying an additional device with new connection. This share has not changed in the last six months.



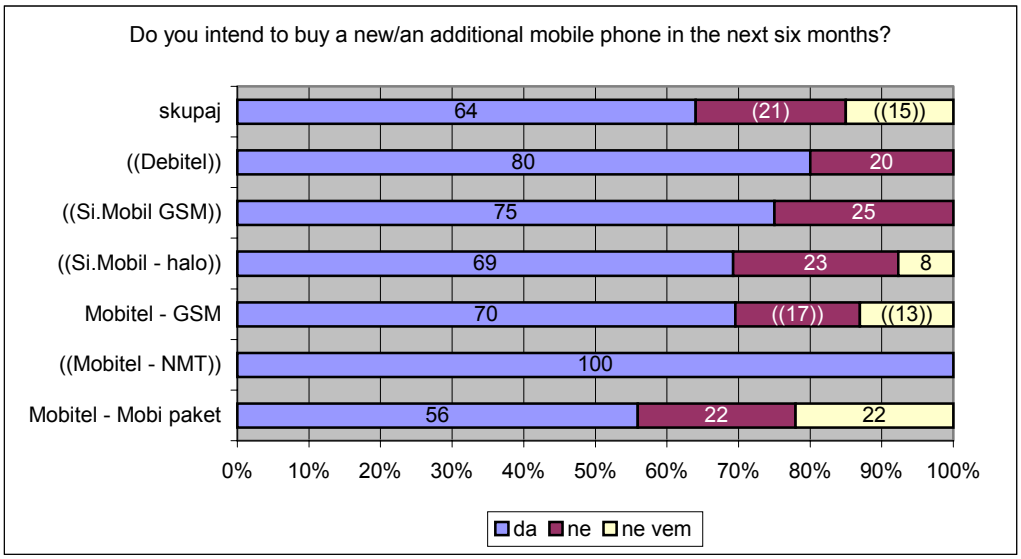
Graph 29: Mobile telephone users that are considering the exchange of the device or buying an additional mobile phone connection (December 2000/June 2001).

The biggest share of mobile telephone users that consider exchange of the current device is among the users of Mobitel – Mobi package and of Si.Mobil – Halo package. The biggest share of users that are considering purchase of an additional mobile connection is among subscribers at Mobitel - NMT. The biggest share of users that do not consider neither the exchange nor the purchase of a new connection is among subscribers at Si.Mobil - GSM.



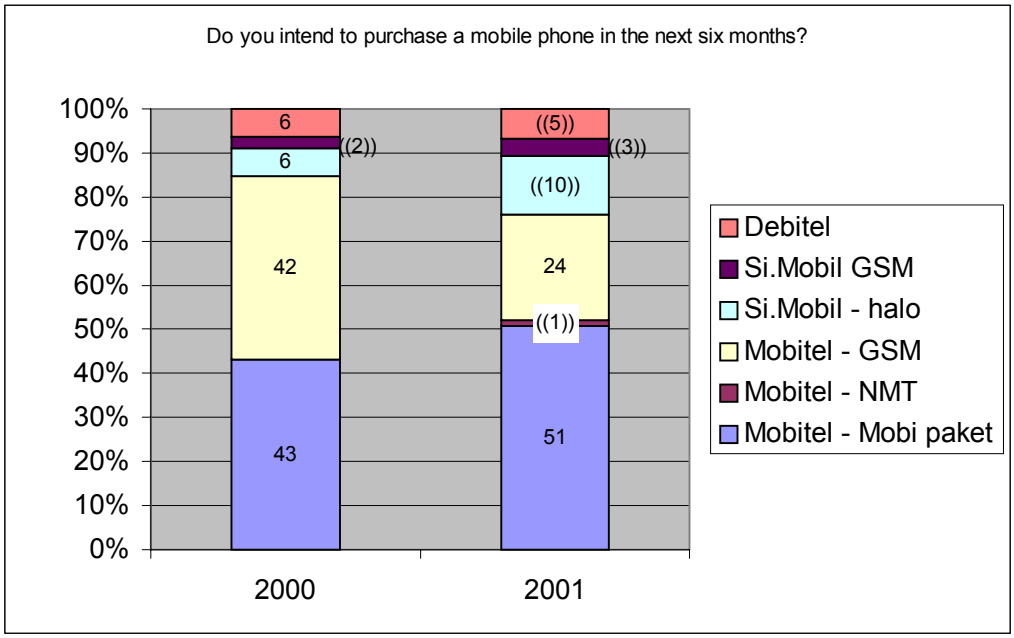
Graph 30: Mobile telephones users that are considering the exchange or the purchase of an additional mobile phone or device by the mobile telephone operator (June 2001).

Four-fifth of Debitel's users and all NMT package users that are considering the exchange or the purchase of an additional mobile connection intends to do so in six months.



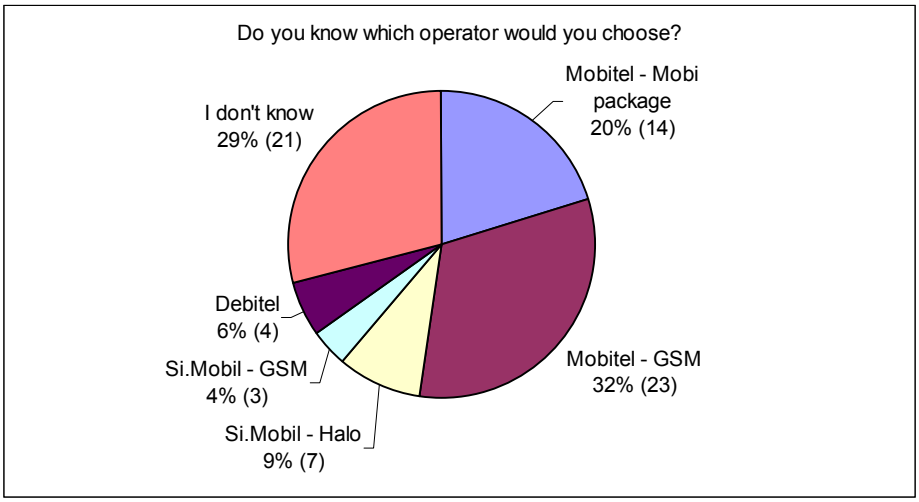
Graph 31: Six month buying intentions among users that consider a new/an additional connection by mobile telephone operator (June 2001).(DA/NE/NE VEM→YES/NO/DON'T KNOW)

About 65% of mobile telephone users that consider exchanging or purchasing an additional mobile phone connection intend to do so in six months. The majority of those that plan the purchase of a new connection in next six months are Mobi package subscribers. This share has increased since December 2000. The share of those that intend purchase in six month has also increased among users of Si.Mobil – Halo package. The share of Mobitel – GSM subscribers that intend to exchange or purchase an additional mobile phone has decreased significantly, but other shares remain more or less the same.

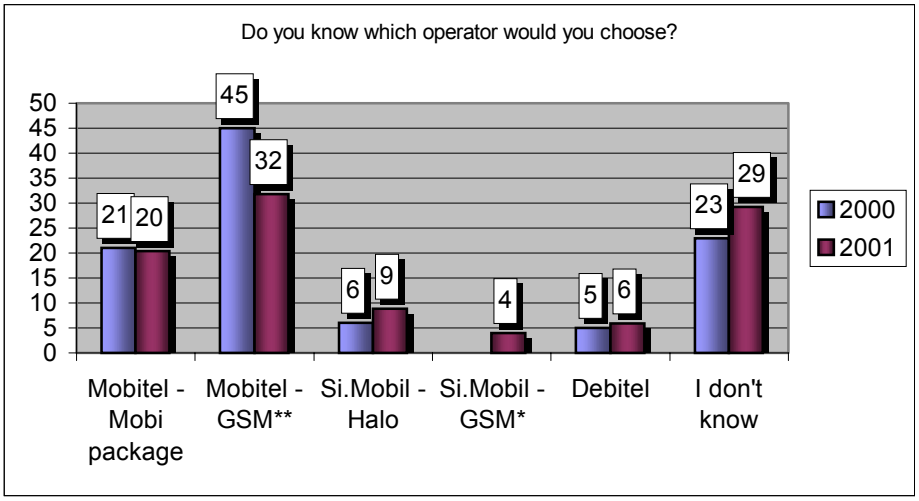


Graph 32: Structure of mobile telephones users that are considering either the exchange or the purchase of an additional connection in the next six months by current mobile telephones operator (December 2000/June 2001).

Half of mobile telephone users that intend to exchange or purchase an additional mobile connection in the next six months would choose Mobitel as operator on a new connection, but almost a third (±10%) does not yet know which operator they would choose. We should add, that none of the respondents stated Si.Mobil as possible mobile telephone operator in December 2000, but in June 2001 there are about 13%(±8%) of such respondents.



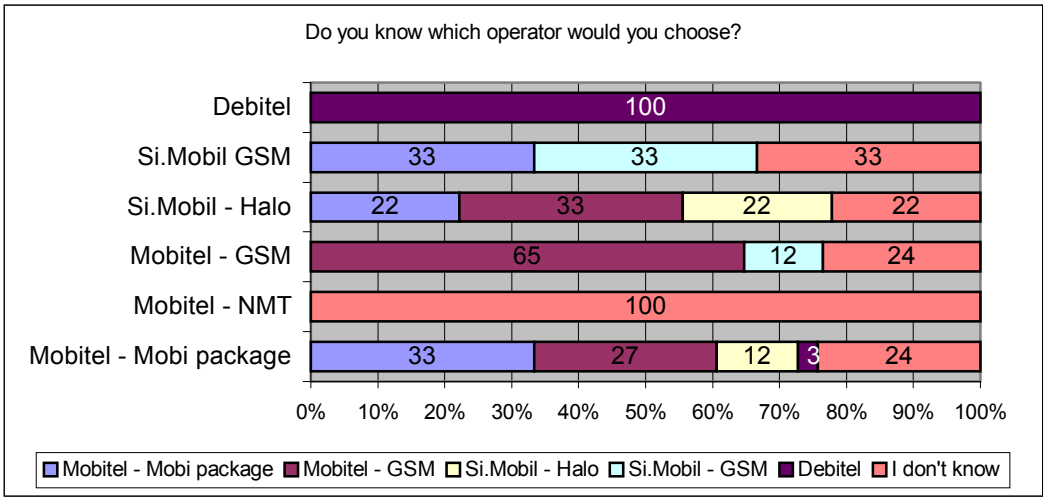
Graph 33: Planned mobile telephone packages among users that plan a new/an additional mobile phone connection in the next six months (number of respondents is stated in brackets) (June 2001, n = 73).



Graph 34: The difference of shares in planned mobile telephone packages among users that plan a new/an additional mobile phone connection in the next six months, between December 2000 and June 2001 (** the difference is statistically significant with confidence interval p<0,05; * the difference is statistically significant with confidence interval p<0,1).

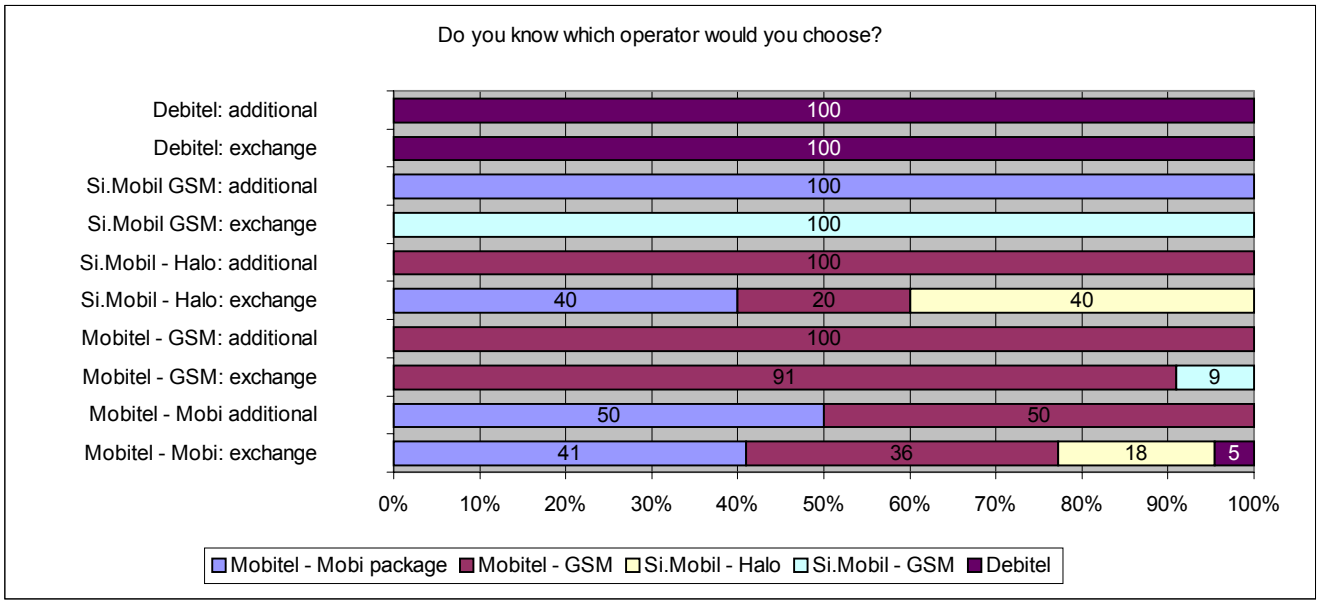
It has to be repeated that over all the share of those that intend to buy a new connection has decreased from 10% to 5 % of the target population.

The graph bellow indicates the structure of planned package by the current package. The entire graph is illustrative as individual categories contain only a small number of units (less than 10). The most loyal are subscribers at Debitel, followed by Mobitel – GSM. They would use the same operator on the second mobile phone as on the first one.



Graph 35: Planned packages (in six month) by the current package (June 2001, n=67).

The following graph compares the mobile telephone operators by whether the users have the intention to exchange the old connection or the intention to purchase an additional (another) mobile connection. All shares are illustrative due to small number of units in an individual category.



Graph 36: Planned package (in six months) by the current package (December 2000, n = 219) within the group of users that plan the exchange or purchase of an additional mobile phone connection (December 2000, n = 159).

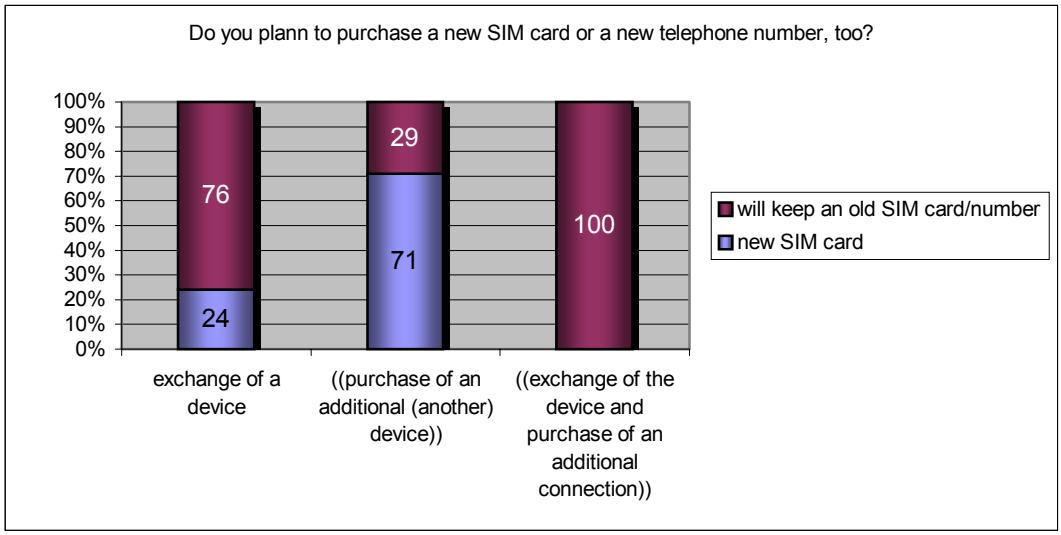
The connection exchange	Mobitel - Mobi		Mobitel - GSM		Si.Mobil - Halo		Si.Mobil - GSM		Debitel		Total	
	n	%	n	%	n	%	n	%	n	%	n	%
Mobitel - Mobi package	9	41	8	36	4	18			1	5	22	100
Mobitel – GSM			10	91			1	9			11	100
Si.Mobil – Halo	2	40	1	20	2	40					5	100
Si.Mobil GSM							1	100			1	100
Debitel									2	100	2	100

Table 5: The shares of mobile operators' packages chosen by mobile telephone users (that consider exchange of the connection in the next six months) by their current mobile package. Comparison among shares (June 2001, n = 41).

Purchase of an additional connection with connection	Mobitel - Mobi		Mobitel - GSM		Si.Mobil – Halo		Si.Mobil - GSM		Debitel		Total	
	n	%	n	%	n	%	n	%	n	%	n	%
Mobitel - Mobi package	1	50	1	50							2	100
Mobitel – GSM			1	100							1	100
Si.Mobil – Halo			2	100							2	100
Si.Mobil GSM	1	100									1	100
Debitel									1	100	1	100

Table 6: The shares of mobile operators' packages chosen by mobile telephone users (that consider purchase of an additional connection in the next six months) by their current mobile package. Comparison among shares (June 2001, n = 7).

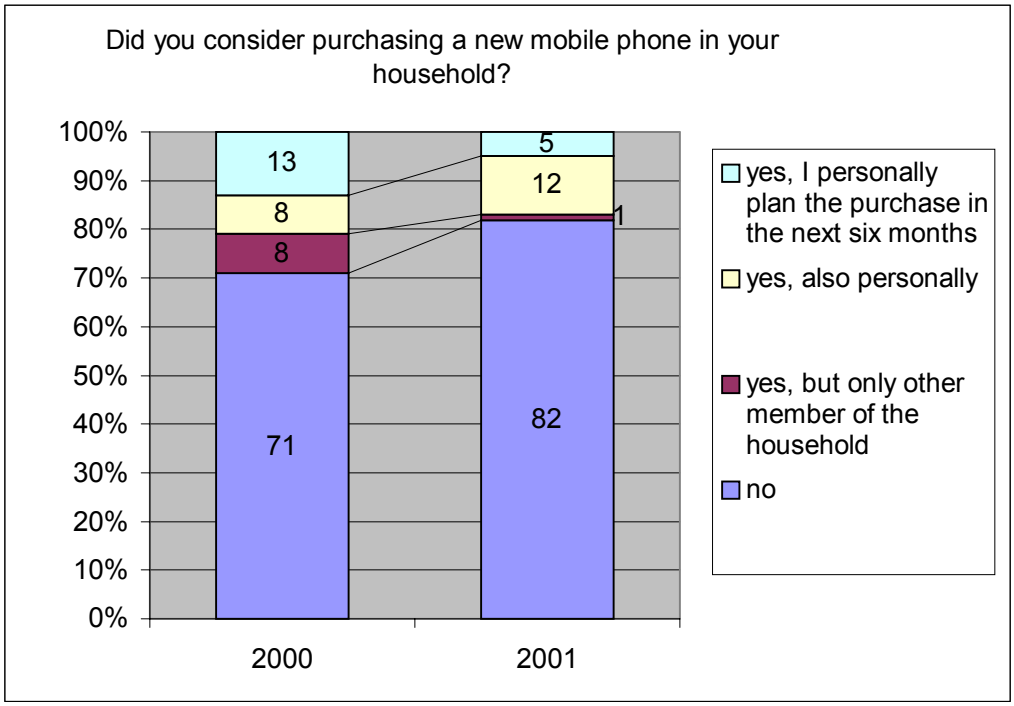
The graph bellow shows the future action of those that would exchange a device or purchase an additional device or connection. The majority of those that would only exchange a device would also keep the old SIM card or an old telephone number. Those who intend to purchase an additional mobile device would mostly purchase a new SIM card, while those who plan the exchange of a device and the purchase of an additional device with connection plan to keep the old number.



Graph 37: The share of persons that would in exchanging or purchasing a new additional device (connection) buy a new SIM card or keep an old one (June 2001).

4.2 Households without a mobile phone

The majority of households without a mobile device do not consider the purchase (82 %). This percentage is bigger than six months ago. There are also 11% less households without a mobile phone. About 18% of these households consider purchasing a mobile device. Almost all respondents plan to purchase it for personal use and not for other member of the household, among those •27% in six month.

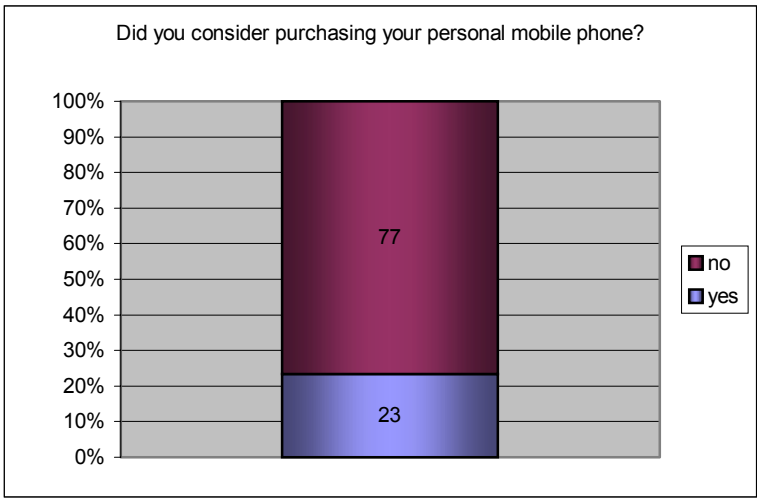


Graph 38: Purchase intentions of households without a mobile phone (December 2000/June 2001), n=87.

No respondent, who plans the purchase in the next six months, does yet know which operator would he/she choose. (n=3)**.**

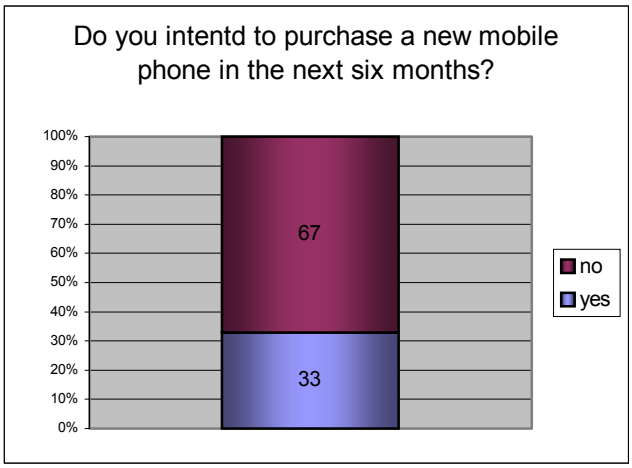
4.3 Nonusers in households with a mobile phone

Only a quarter of persons that do not yet use a mobile phone, although it is owned in the household, personally plan to purchase one.



Graph 39: Purchase intentions of persons without a mobile phone in households with a mobile phone (June 2001, n=77).

Among those about a third intends to purchase a mobile phone in six months. The estimates are inaccurate due to a small number of units (33%±27%).



Graph 40: Six months purchase intentions of persons without a mobile phone in households where a mobile phone is owned (June 2001, n=19).

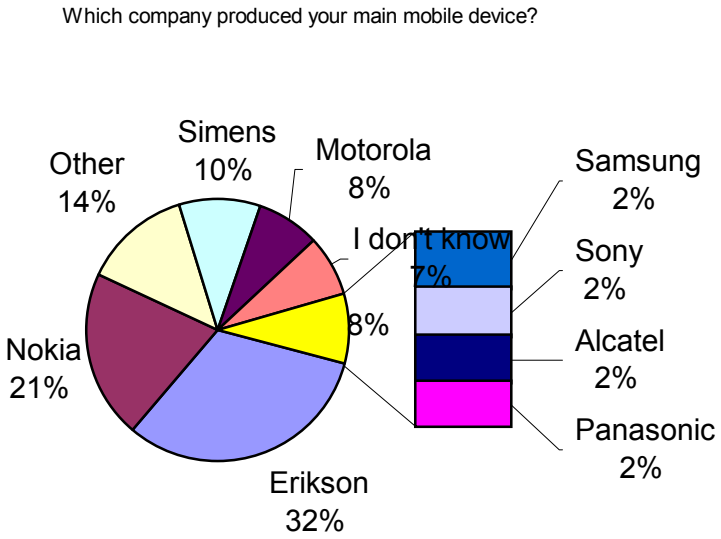
Three respondents (60% ± 44%) do not know which operator would they choose, but one respondent chose Mobitel – Mobi package (•20%) and another Si.Mobil – Halo (•20%).

The majority will buy a new SIM card (•75%, n=3) while one respondent (•25%) does not know, whether to purchase a new SIM card/a phone number or to keep an old one.

5 MOBILE PHONE DEVICES

5.1 The market shares of mobile devices' producers

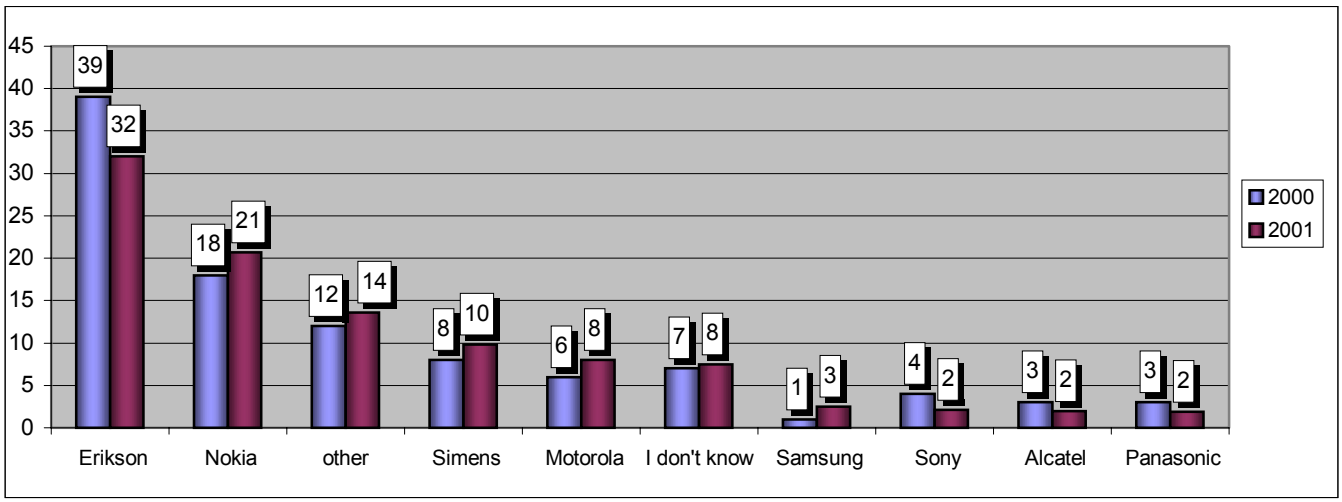
The biggest share among the mobile devices' producers holds Ericsson. Their mobile devices' are being used by one third of all mobile phone users in Slovenia. Ericsson is followed by Nokia with one-fifth of all users. We are referring here to main mobile device only, as we did not inquire about the brand of the additional mobile phones.



Graph 41: The share of mobile devices' producers (June 2001).

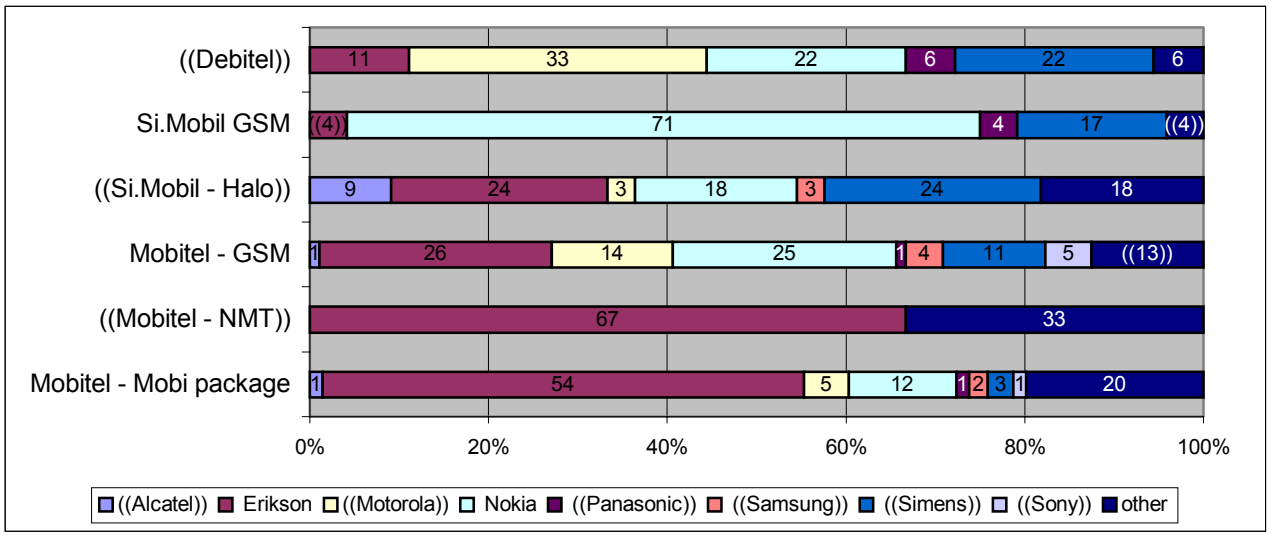
The graph bellow compares shares of individual mobile device's brand between December 2000 and June 2001. A statistically significant decrease of Ericsson is indicated due to increase of Nokia, Siemens, Motorola and other mobile device brands shares.

Again, we should be aware of small numbers in certain groups.



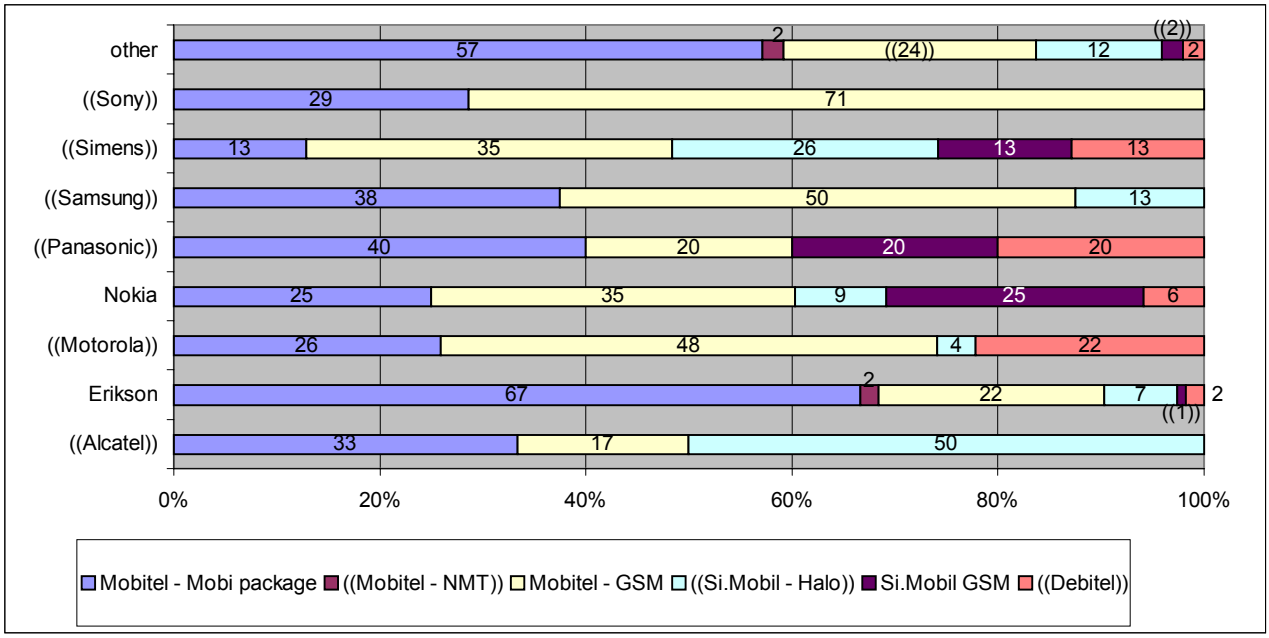
Graph 42: Comparison of mobile device's brand shares (December 2000/June 2001).

The following graph indicates the share of individual mobile device producer by the subscription packages of different operators. Ericsson is dominating in Mobitel's packages, Nokia in Si.Mobil's packages and Motorola in Debitel's.



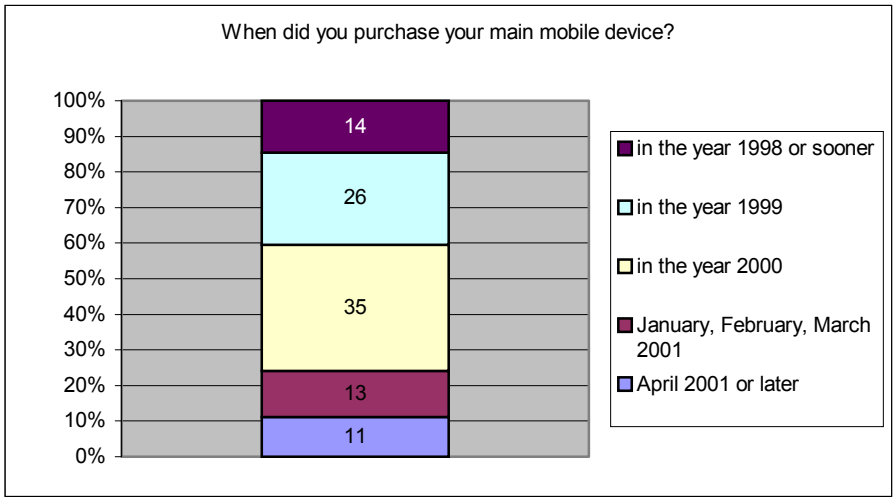
Graph 43: Mobile device's brand shares by individual packages of different operators (June 2001).

More than half of all Ericsson's devices in Slovenia are owned by Mobitel – Mobi package subscribers. In total, Mobitel's service users use 90 % of all Ericsson's devices. Mobitel is also dominating among owners of other mobile devices' brands, which is expected due to its market share. Only Alcatel's devices are mostly being used by Si.Mobil's users.



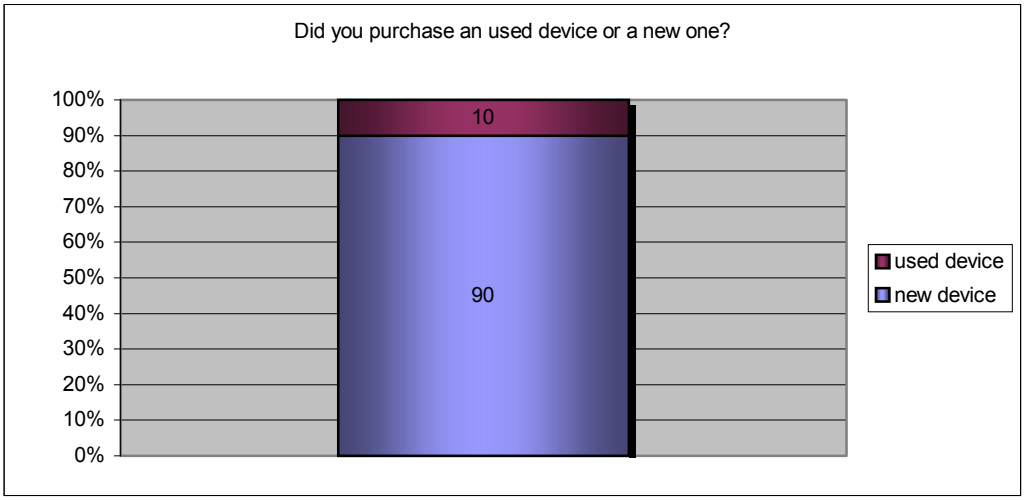
Graph 44: The shares of mobile operators' packages by the brand of mobile device (June 2001).

The graph bellow indicates the time of main mobile devices' purchase. The majority of users purchased their device in 1999 or 2000, a little less purchased it in the beginning of 2001 or in 1998 and sooner.



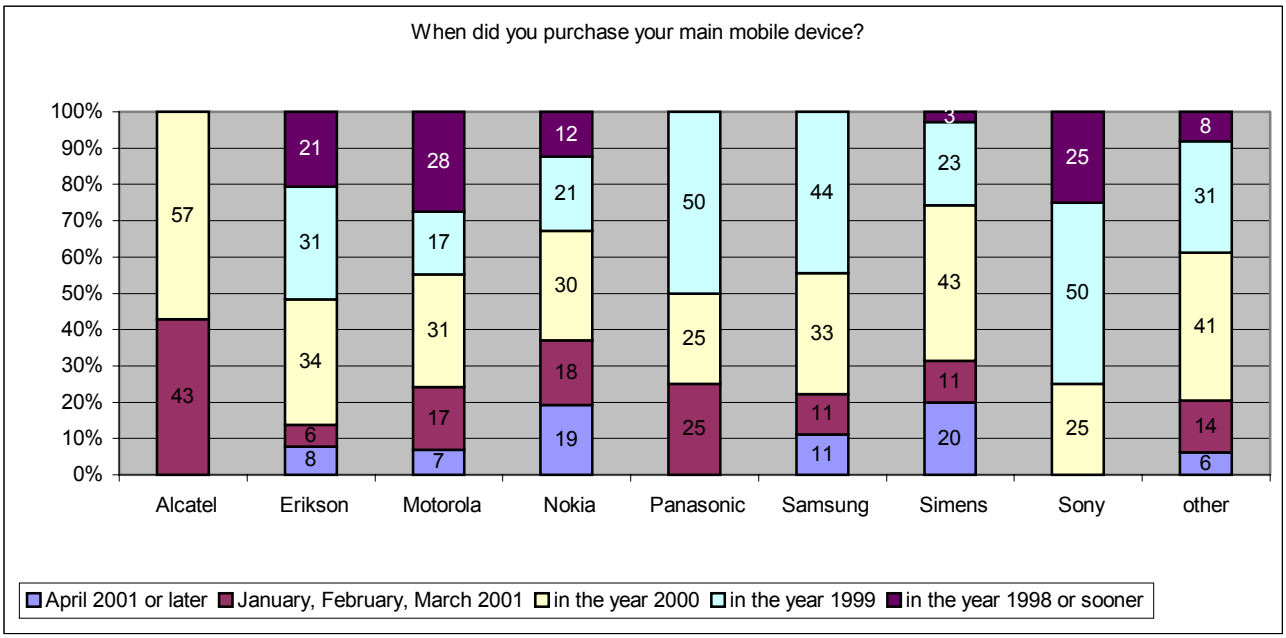
Graph 45: The shares of mobile devices' ownership length (June 2001).

Around 90% of users purchased a new mobile device and not an old one, which is shown in the graph bellow.



Graph 46: The share of new or used devices' purchases (June 2001).

The following graph indicates the time of purchase by the producers' brand. Ericsson, Motorola, Sony and partly Nokia are brands that hold the biggest share of users with the longest usage of these brands. Lately, the mobile telephone users purchased mainly Nokia's, Alcatel's and Siemens's devices.

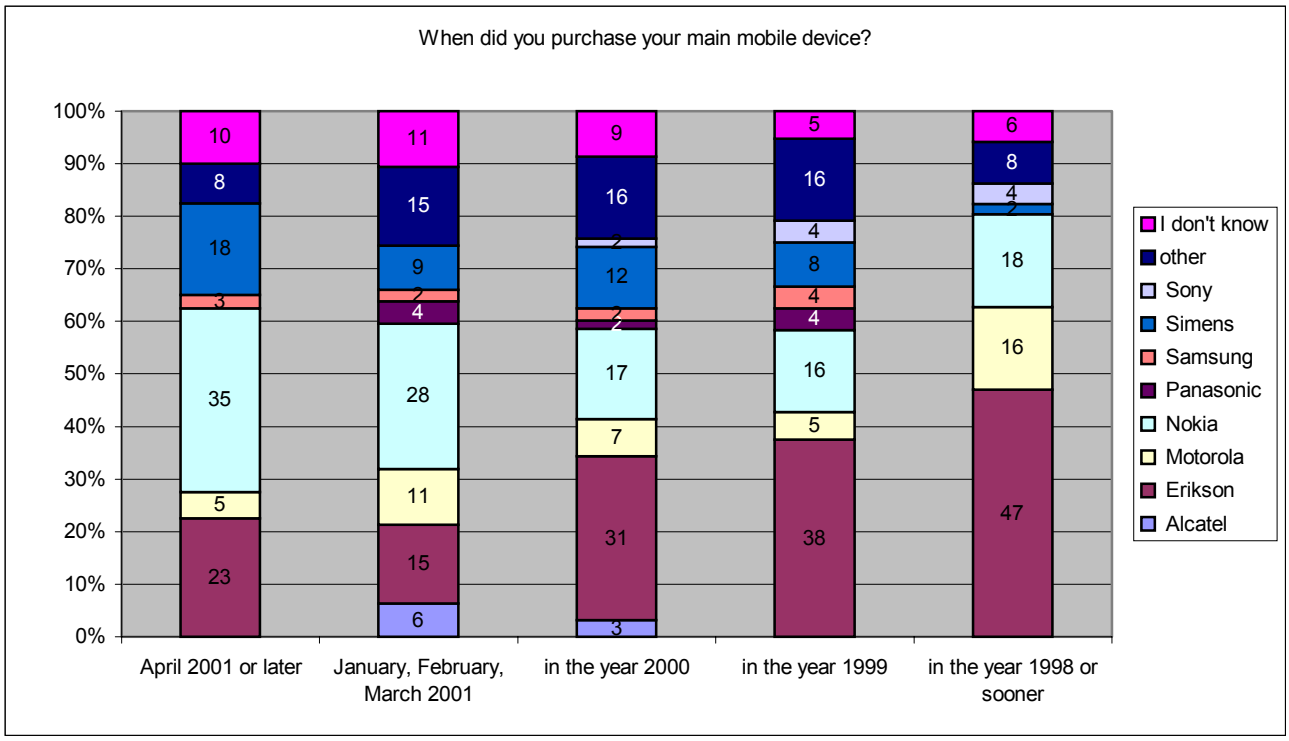


Graph 47: The shares of mobile device ownership length by the mobile device's brand (June 2001).

	When did you purchase your main mobile device?										Total
	April 2001 or later		January, February, March 2001		In the year 2000		In the year 1999		In the year 1998 or sooner		
	n	%	n	%	n	%	n	%	n	%	%
Alcatel			3	43	4	57					100%
Ericsson	9	8	7	6	40	34	36	31	24	21	100%
Motorola	2	7	5	17	9	31	5	17	8	28	100%
Nokia	14	19	13	18	22	30	15	21	9	12	100%
Panasonic			2	25	2	25	4	50			100%
Samsung	1	11	1	11	3	33	4	44			100%
Siemens	7	20	4	11	15	43	8	23	1	3	100%
Sony					2	25	4	50	2	25	100%
other	3	6	7	14	20	41	15	31	4	8	100%

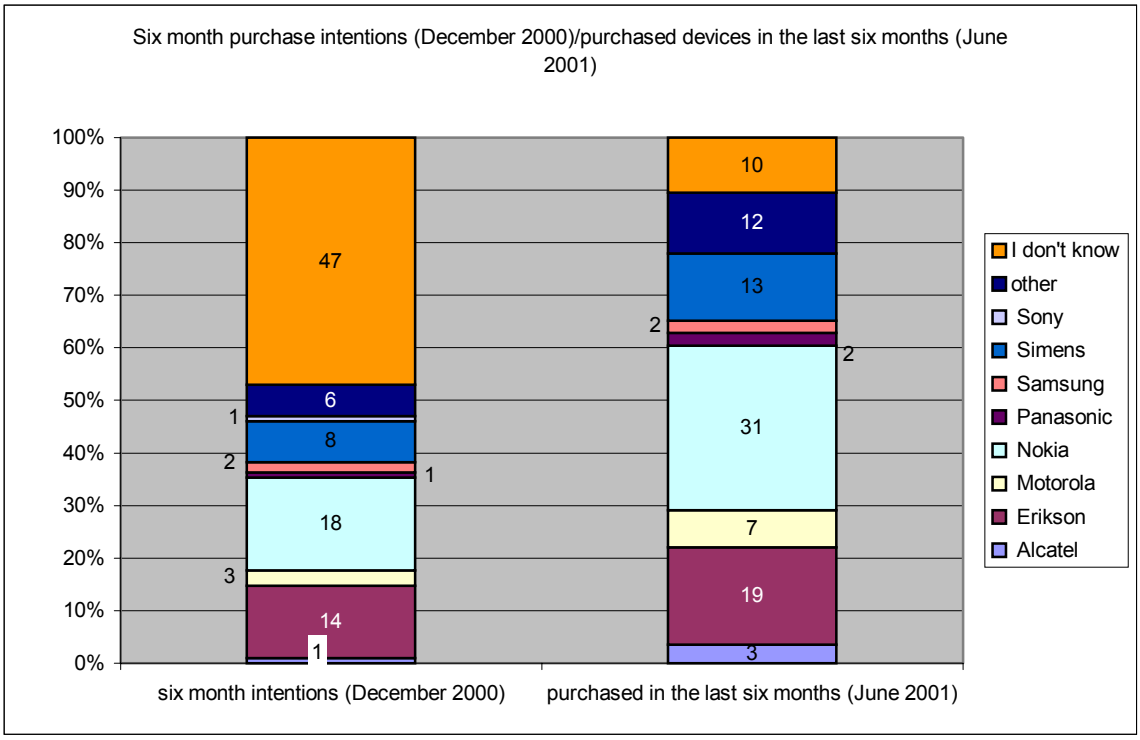
Table 7: The shares of mobile device ownership length by the mobile device's brands (June 2001).

The graph bellow shows shares of specific brands according to the time of their purchase. In the year 1998 and before the users mostly purchased Ericsson's, Motorola's and Nokia's devices. Lately Nokia's and Siemens's shares are increasing, while Ericsson's, but the Motorola's market shares are oscillating, partially due to imprecision.



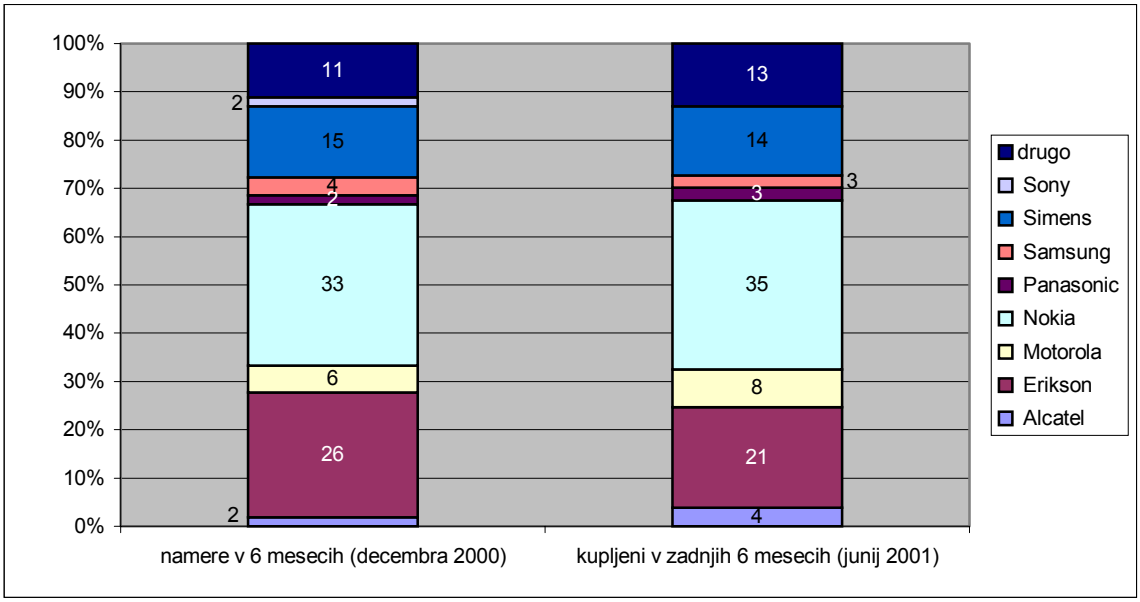
Graph 48: The share of specific mobile device's brand according to the purchase period (June 2001).

The comparison of six month purchase intentions with the number of actually purchased devices in this period shows that the actual share of purchased brands has exceeded the purchase intentions six months ago in almost all brands. This is, of course, basically due to those indifferent in December 2000.



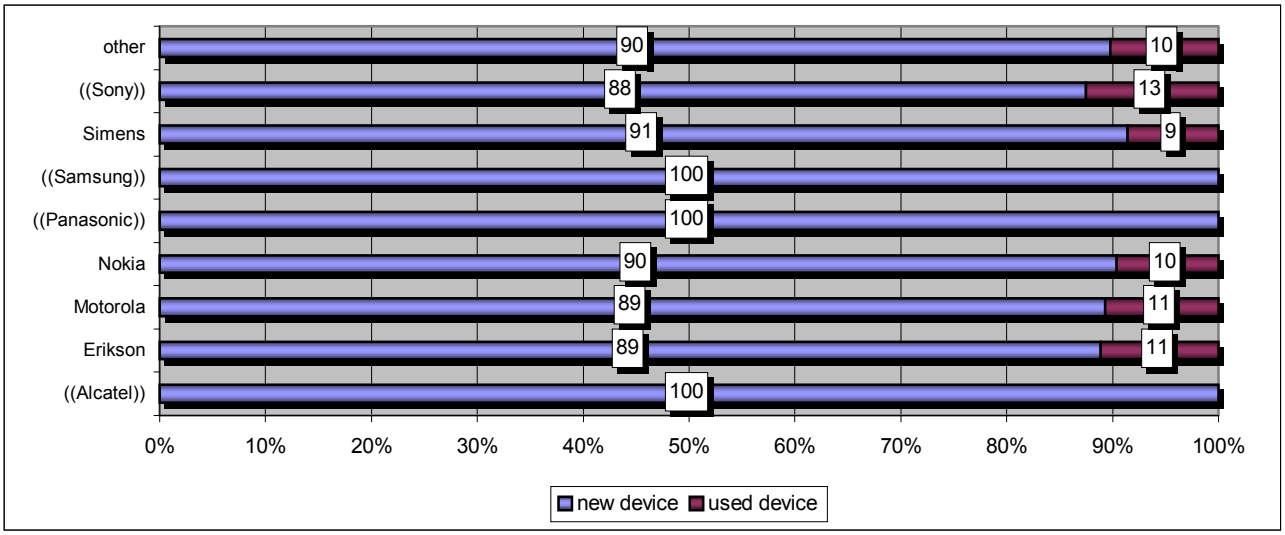
Graph 49: Six month purchase intentions (December 2000) in comparison with the purchases made in this period (June 2001).

However, the indifferent have chosen the devices' brands in similar shares as those who already knew which brand they would purchase. The next graph clearly illustrate that the intentions in December 2000 were very precise in predicting the shares in the first half of 2001.



Graph 50: six-month purchase intentions (December 2000) in comparison with the realized purchases in this same period (June 2001) - only those who knew which brand they would purchase are considered for 2000.

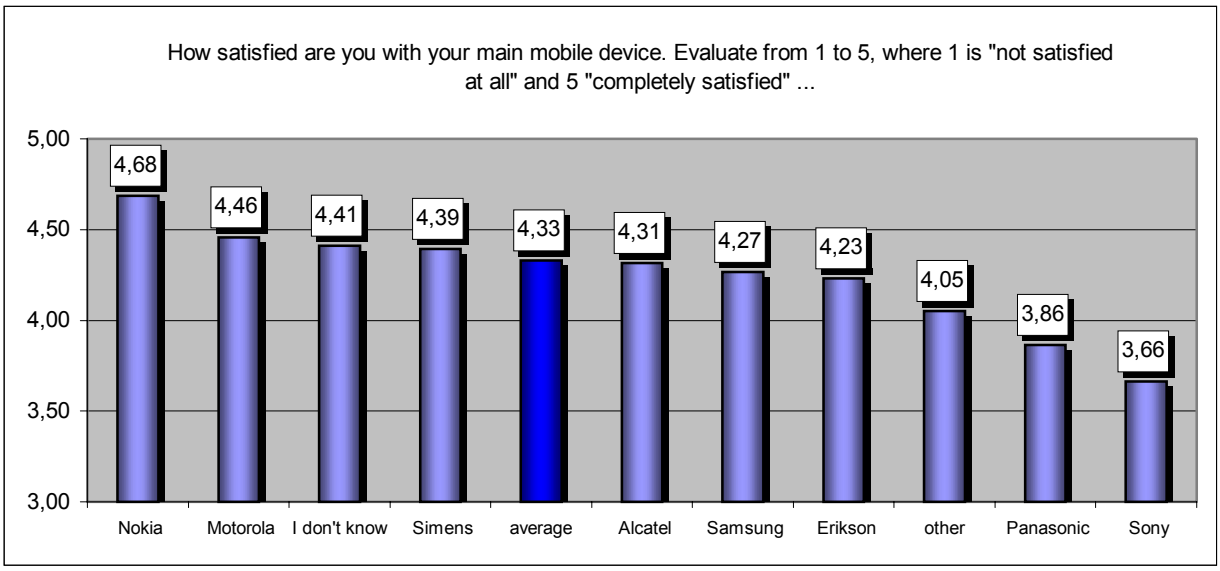
The graph bellow indicates the shares of new or used purchased phones by specific mobile device's brands. About 90% of users purchased new mobile phones, with an exception of Samsung, Panasonic and Alcatel, where all purchased phones were new.



Graph 51: The share of new or used purchased devices by mobile device's brand (June 2001).

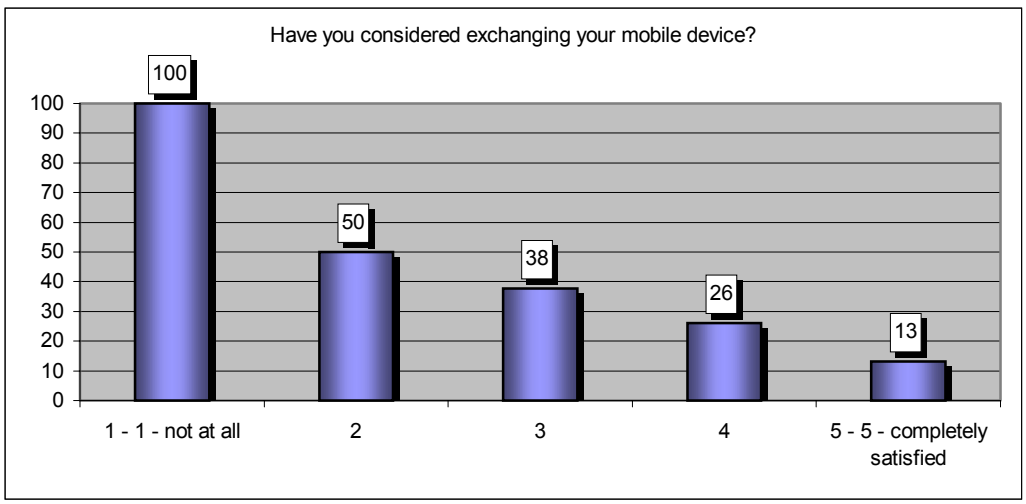
5.2 Satisfaction with mobile devices

The majority of mobile device users are satisfied with their main mobile device, which is also confirmed by an average of 4,33. The analysis of variance and t-test showed that the differences between the averages are statistically significant. Thus the users of Nokia are more satisfied with their device than the users of Ericsson's, Siemens's, Sony's and "other" devices. Here, of course, the effect of new device is present as new device (i.e. Nokia) always bring more satisfaction than an old one (i.e. Ericsson).



Graph 52: The satisfaction of users with their main mobile devices (June 2001)

The satisfaction also conditions the intention of exchanging the device. Those who are less satisfied with their device will more likely exchange it. If we put it differently: all those who are not satisfied at all will most likely exchange it. Only 13% of those who are completely satisfied with their device will exchange it. The differences in shares are statistically significant ($p<0,05$).

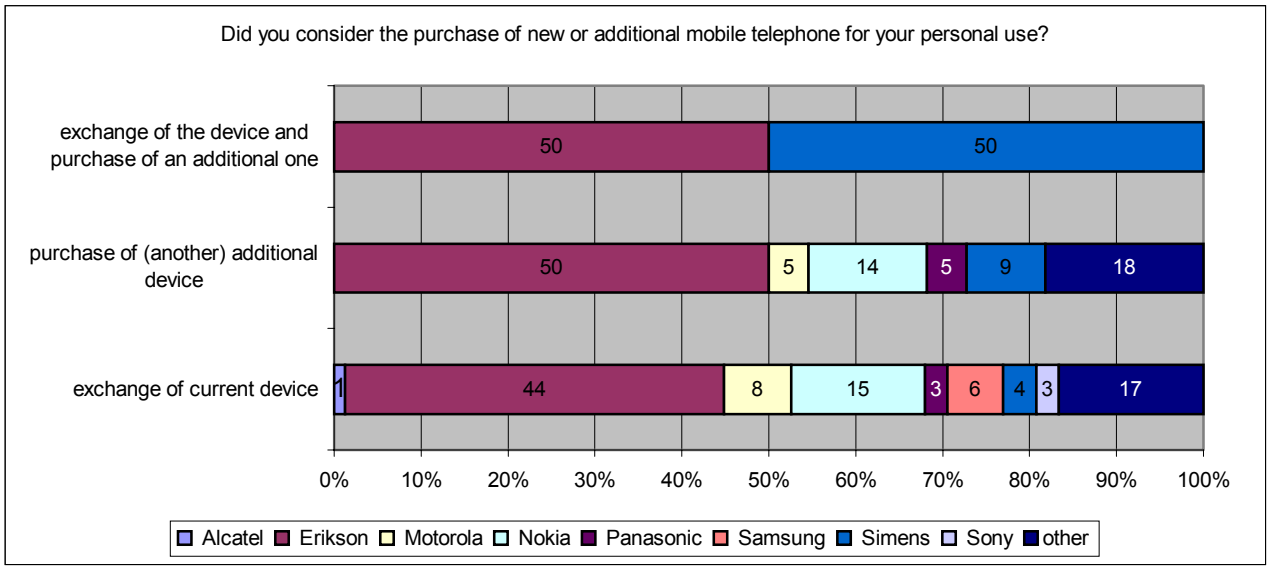


Graph 53: The considerations of users to exchange their device by the satisfaction with their own mobile device (June 2001).

6 PURCHASE INTENTIONS REGARDING DEVICES

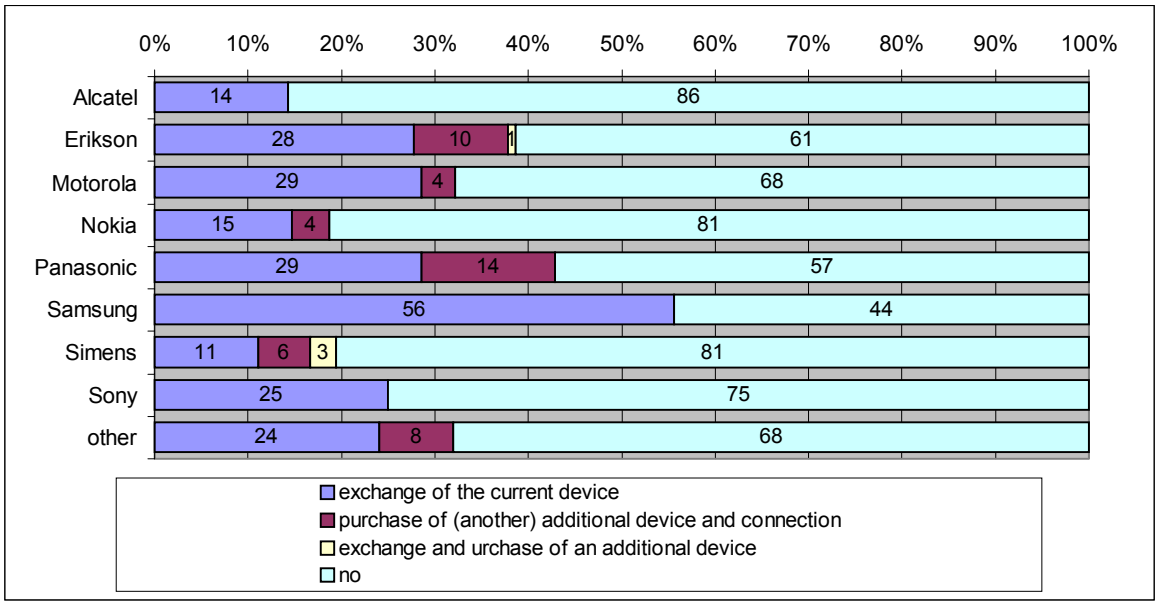
6.1 Mobile telephone users

Let us take a look at mobile telephone users' intentions. The majority of users that are considering the exchange of the device belongs to Ericsson, which above all reflects the fact that these devices are currently most prevalent among mobile telephone users. However, here its share is even larger. A warning - the graph is only illustrative due to small number of units, what perhaps particularly holds for Siemens in the first category.



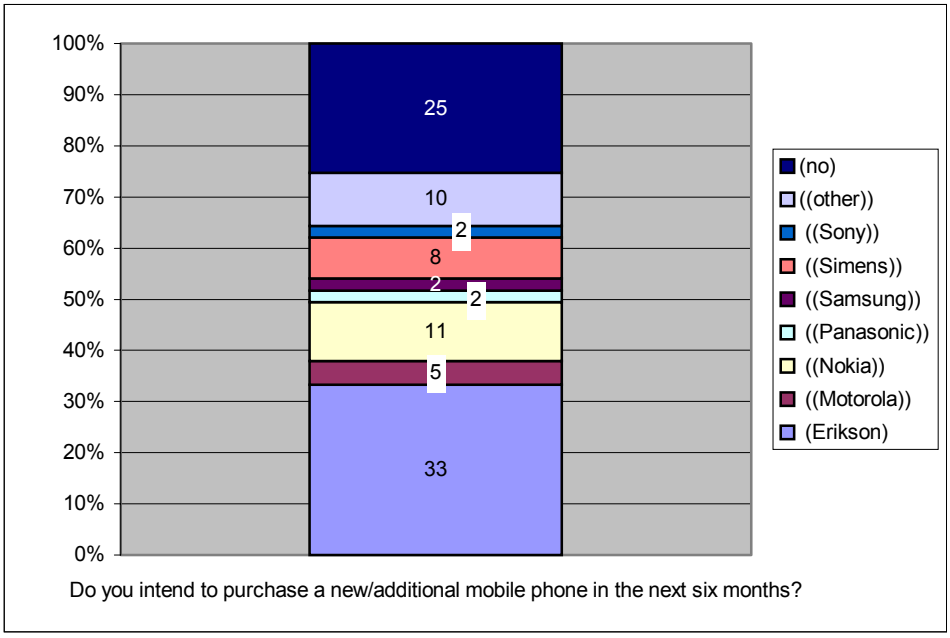
Graph 54: Categories of future purchasers by the current main device brand (June 2001).

Among mobile telephone users that consider the exchange of their current device, the biggest share is found among the current owners of Samsung devices (see the following graph), while the owners of Panasonic devices are considering the purchase of an additional mobile device the most often. The biggest share of users that do not consider the exchange or the purchase of a new device represent the owners of Alcatel, Siemens and Nokia devices (as they recently bought it). The reason for that is the high purchase of these devices in the last six months. The shares are illustrative due to a small number of units.



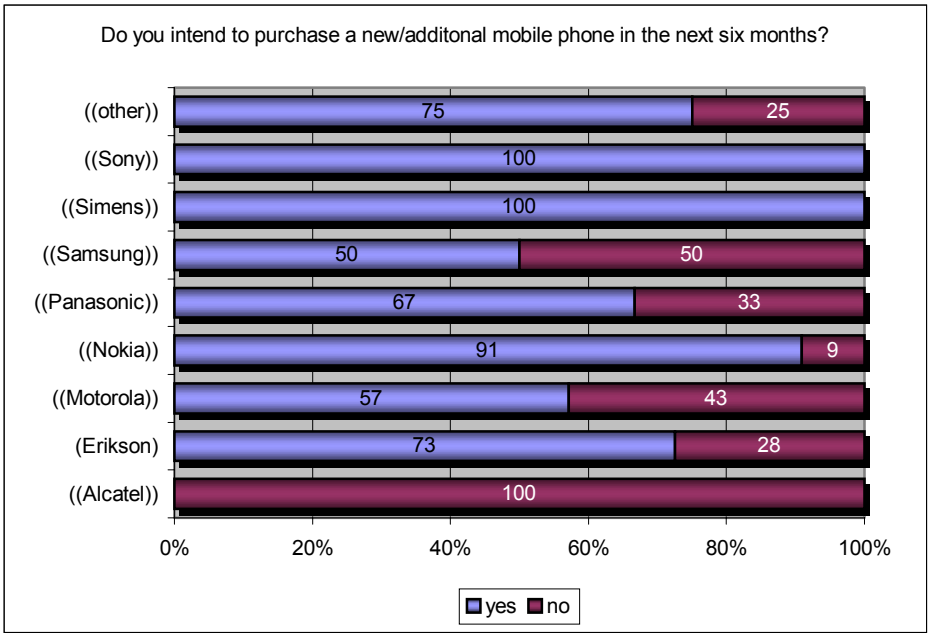
Graph 55: The shares of mobile telephone users that consider the exchange or the purchase of an additional mobile phone by specific mobile phones' brands (June 2001).

Three-quarters of mobile telephone users that consider the exchange or the purchase of an additional device intend to do so in six month. Ericsson device users plan the majority of new devices' purchases in the next six months, which reflects the fact that this brand is currently prevalent among users.



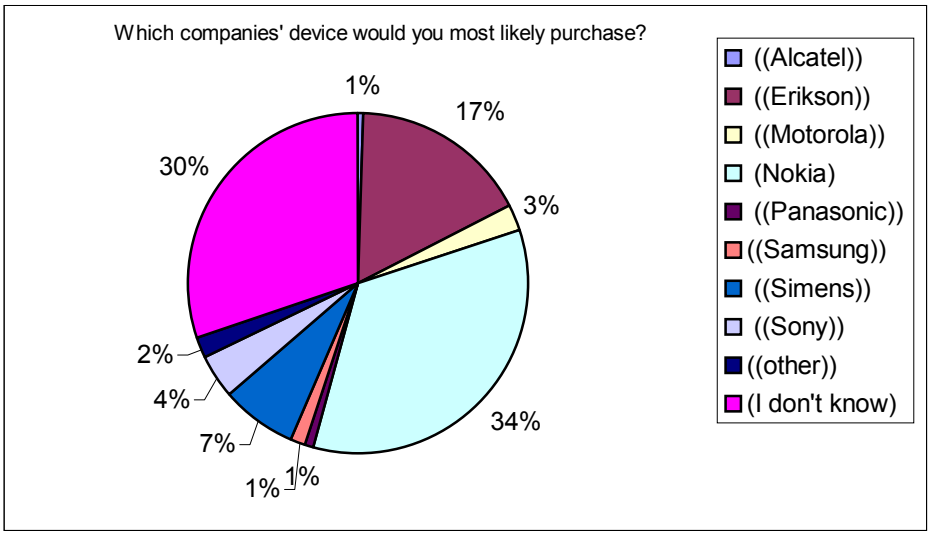
Graph 56: The shares of mobile telephone users that consider either the exchange or the purchase of an additional mobile phone in the next six months by the current mobile devices' brands (June 2001).

All Sony and Siemens device users that consider the exchange or the purchase of an additional mobile phone intend to do so in six month. The Alcatel share is too small to have a reliable estimate.



Graph 57: The shares of mobile telephone users that consider either the exchange or the purchase of an additional mobile device in the next six months by the current mobile devices' brands (June 2001)

About 30% of mobile telephone users that intend to exchange or purchase an additional mobile device in the next six months do not yet know which brand they would choose. A third of users would choose Nokia, while smaller shares of users would choose Ericsson or other devices.



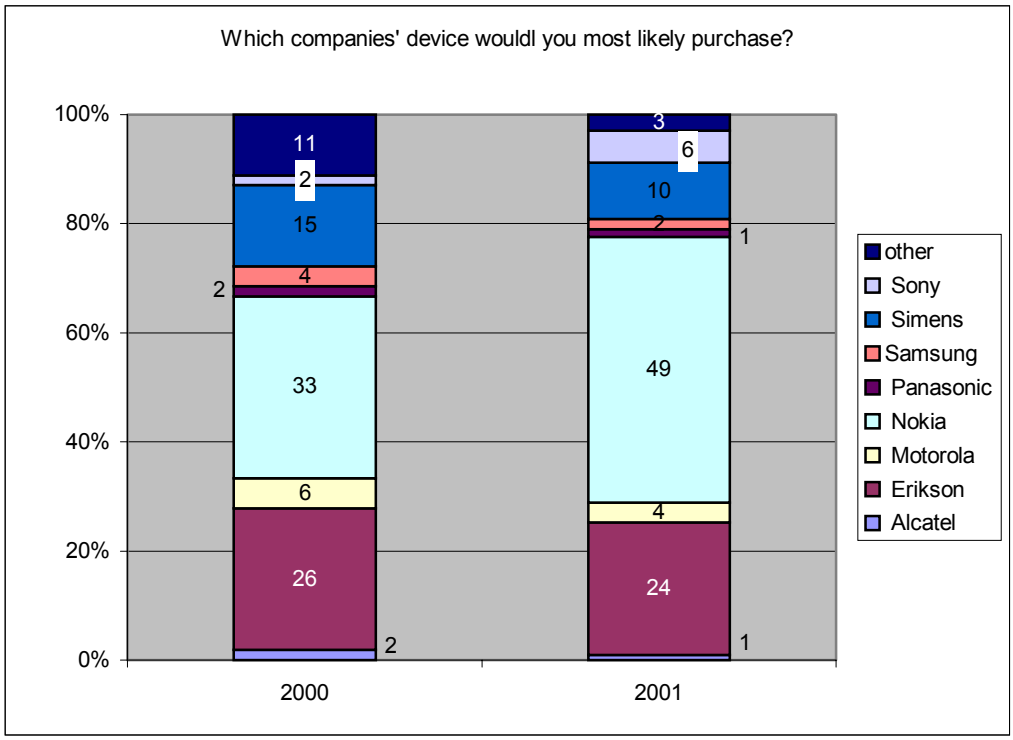
Graph 58: The shares of purchase intentions for the mobile devices' brands among those mobile telephone users that consider the exchange or the purchase of an additional mobile device in the next six months (June 2001).

	2000		2001	
Replacement	n	%	n	%
Ericsson	28	18	9	18
Motorola	5	3	2	4
Nokia*	30	20	22	41
Panasonic	1	1	1	2
Siemens*	18	12	2	4
Sony	4	3	1	2
drugo	6	4	1	1
ne vem	55	36	15	28
Skupaj	153	97	53	100

	2000		2001	
Additional device	n	%	N	%
Ericsson	10	12	5	22
Nokia	13	17	4	21
Samsung	2	2	1	5
Siemens	4	5	3	13
Sony			2	10
drugo	12	16	1	5
ne vem	33	43	5	24
Skupaj	77	100	21	100

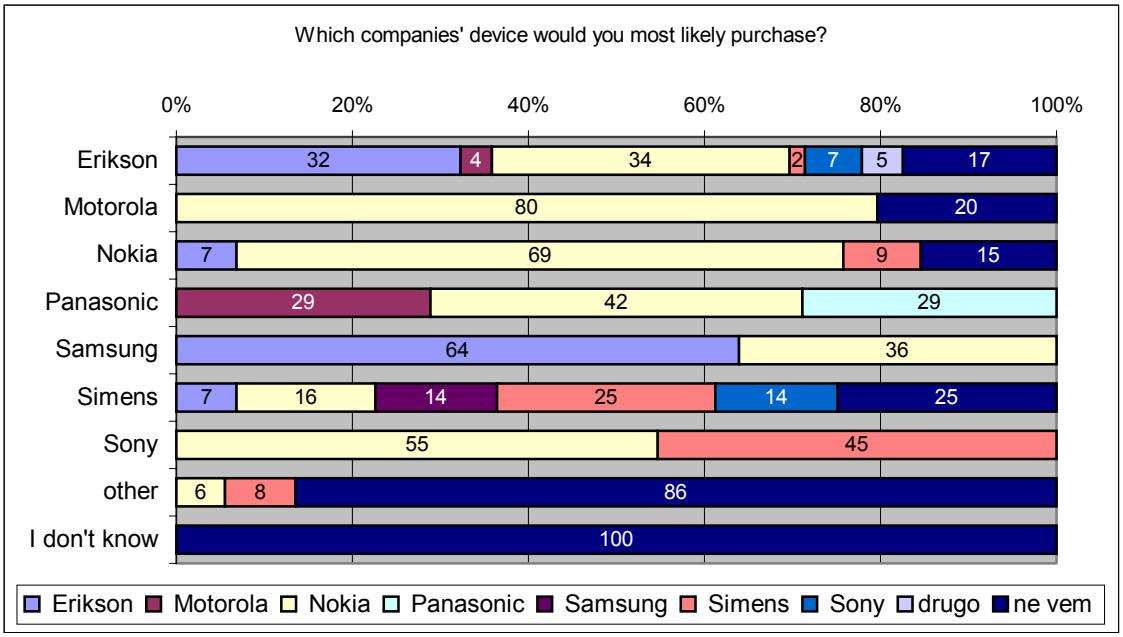
Table 8: The shares of purchase intentions for mobile devices' brands among those users that consider the exchange or the purchase of an additional mobile device in the next six months (December 2000/June 2001). The share of brands marked with * have changed in statistically significant way.

Graph 59 shows the comparison of purchase intentions for mobile devices' brands in the next six months in December 2000 and June 2001. We included only those who knew which brand they would choose. It is noticeable that the share of Nokia purchase intentions has increased significantly, while the Siemens' share and share of "other" have decreased (the difference is not statistically significant, however it bring certain probability to this). The brands of other producers have remained approximately the same.



Graph 59: The comparison of mobile devices' purchase intentions in the next six months, between December 2000 and June 2001.

The graph bellow indicates which brand of mobile phone would the users most likely choose as a new or an additional device compared to the existing device The most loyal are the Nokia users – thus, two-third of Nokia users intend to choose the same brand for their new or an additional mobile device. Certain shares are again only illustrative.



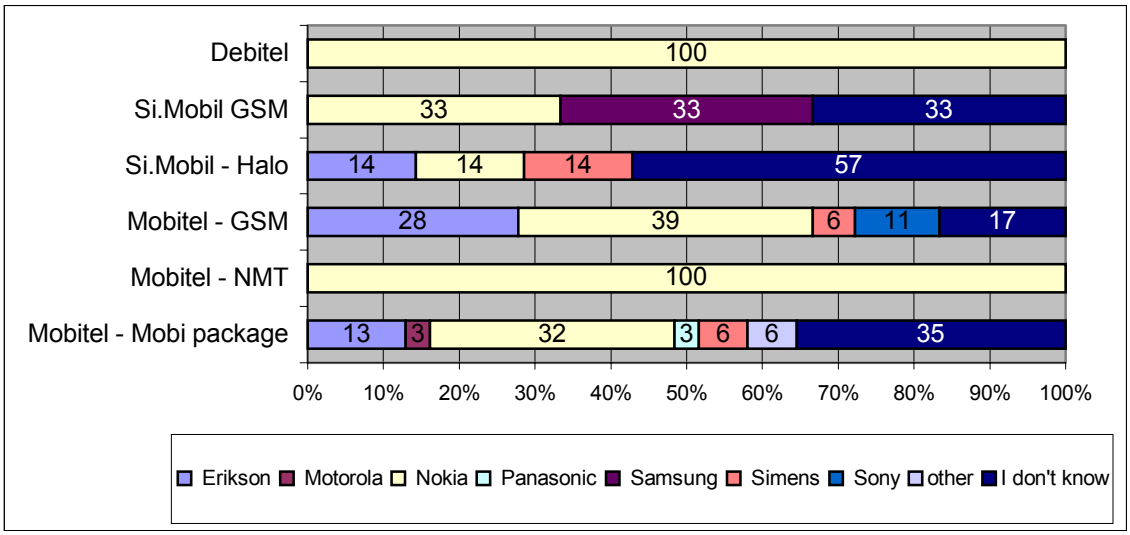
Graph 60: The shares of mobile devices' brands that are most likely to be chosen by mobile telephone users that considers the exchange or the purchase of an additional mobile device in the next six months by their current mobile devices' brand (June 2001).

Number of units	Ericsson	Motorola	Nokia	Panasonic	Samsung	Siemens	Sony	Other	I don't know	Total
Ericsson	12	1	12			1	2	2	6	36
Motorola			3						1	4
Nokia	1		7			1			1	10
Panasonic		1	1	1						3
Samsung	1		1							2
Siemens	1		1		1	2	1		2	8
Sony			1			1				2
Other			1			1			8	9
I don't know									1	1
Percentages										74
Ericsson	32	4	34			2	7	5	17	100
Motorola			80						20	100
Nokia	7		69			9			15	100
Panasonic		29	42	29						100
Samsung	64		36							100
Siemens	7		16		14	25	14		25	100
Sony			55			45				100
Other			6			8			86	100
I don't know									100	100

Table 9: The shares of mobile devices' brands which are most likely to be chosen by mobile telephones users that consider the exchange or the purchase of an additional mobile device in the next six months by their current mobile device's brand (June 2001).

The graph bellow indicates the structure of the brands by the mobile telephones operator among persons who intend to purchase a new or an additional mobile phone connection in the next six months.

Mobile telephone users that intend to purchase Mobi and GSM package at Mobitel mostly intend to choose Nokia devices. Moreover, Nokia prevails as the identified choice, while a lot of respondents do not yet know which mobile device brand they would choose. The shares in the following graph are also illustrative due to small groups.



Graph 61: The shares of mobile devices' brands that are being chosen by mobile telephones users in the next six months by the mobile operators' packages (June 2001).

	Mobitel - Mobi		Mobitel - GSM		Si.Mobil - Halo		Si.Mobil – GSM		Debitel	
	n	%	n	%	n	%	n	%	n	%
Ericsson	4	13	5	28	1	14				
Motorola	1	3								
Nokia	10	32	7	39	1	14	1	33	4	100
Panasonic	1	3								
Samsung	1						1	33		
Siemens	2	6	1	6	1	14				
Sony	1		2	11						
Other	2	6								
I don't know	11	35	3	17	4	57	1	33		
Total	31	100	18	100	7	100	3	100	4	100

Table 10: The shares of mobile devices' brands that are being chosen by mobile telephones users in the next six months by the mobile operators' packages (June 2001).

6.2 Households without a mobile phone

Among respondents that come from households without a mobile phone, but intend to purchase one personally in six month, only one (1) respondent knew which mobile phone he/she would purchase (Siemens), while the other two respondents did not know. Other categories are empty due to our sample.

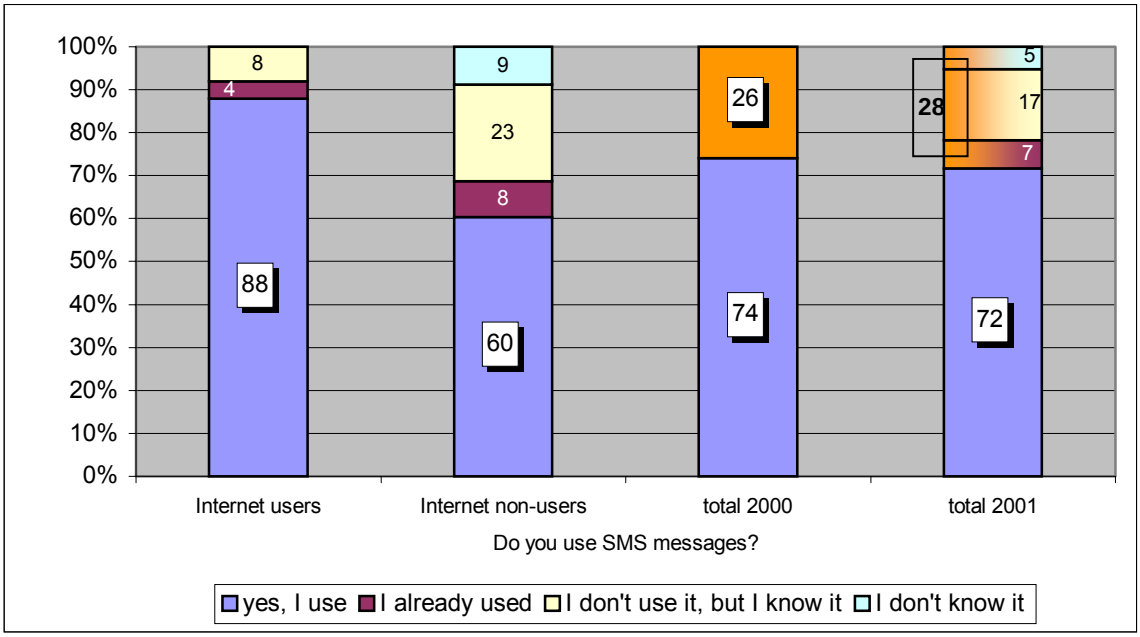
6.3 Persons who do not use a mobile phone, although it is owned in household

The respondents who do not use a mobile phone personally – although it is owned in household – and who are personally planning to purchase it, mostly (3) do not know which mobile device brand they would purchase. One respondent stated that he/she would purchase Alcatel or Nokia mobile device.

7 MOBILE TELEPHONES AND INTERNET

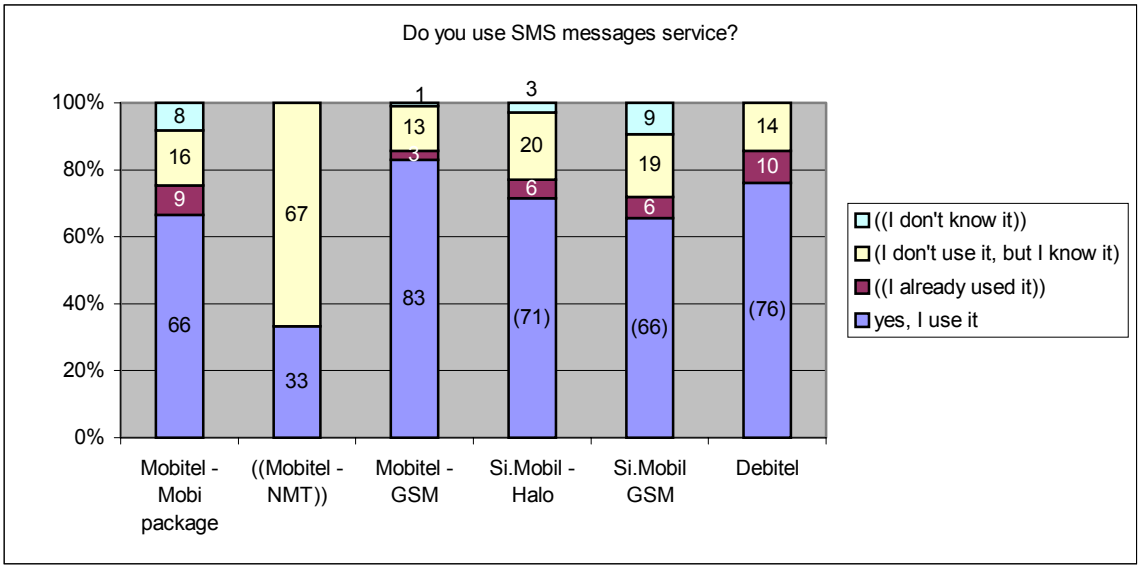
7.1 SMS messages

Three-quarters of mobile telephone users also use SMS messages. SMS messages are more intensively used among monthly Internet users (almost 90%) than among mobile telephone users that do not use the Internet.



Graph 62: The use of SMS messages by the Internet usage and the comparison of shares (December 2000/June 2001).

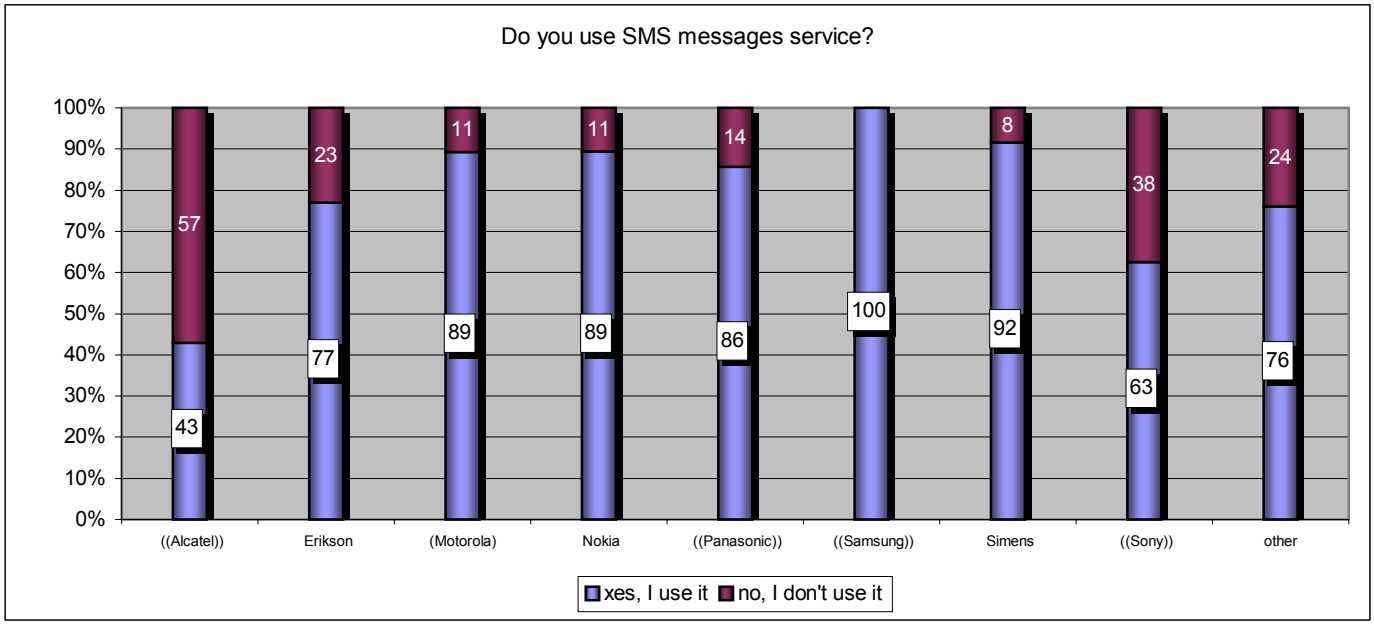
Si.Mobil users use SMS messages somewhat less often, while the subscribers at Mobitel use this service the most.



Graph 63: Use of SMS messages service by the mobile operator (June 2001).

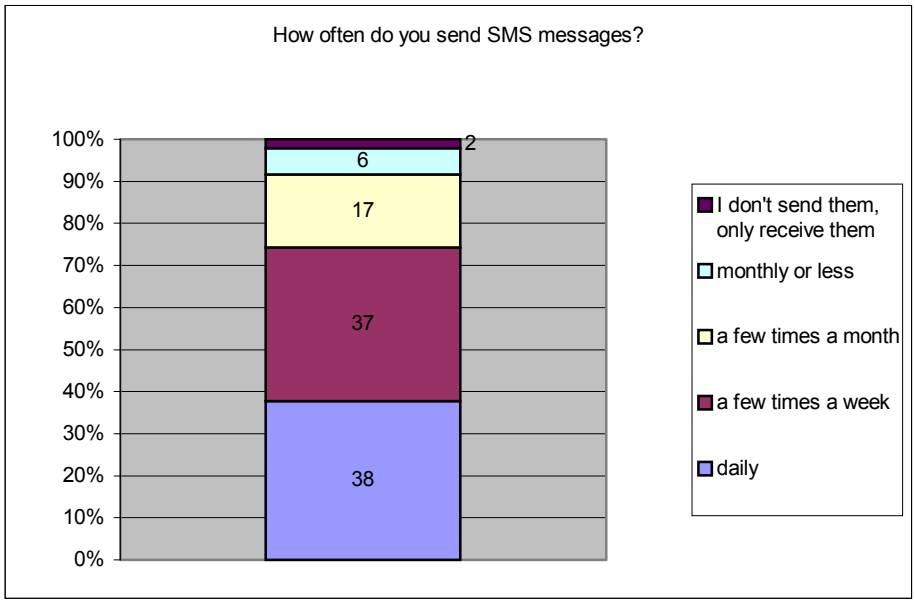
The owners of the brand Samsung send the largest number of the SMS messages, while the owners of the brands Sony and Alcatel send the least messages.

It has to be noted that the question here referred to the general use of SMS messages and it is not necessary that these messages were sent from the main mobile phone whose brand was stated in the survey, even though the correlation is very high.



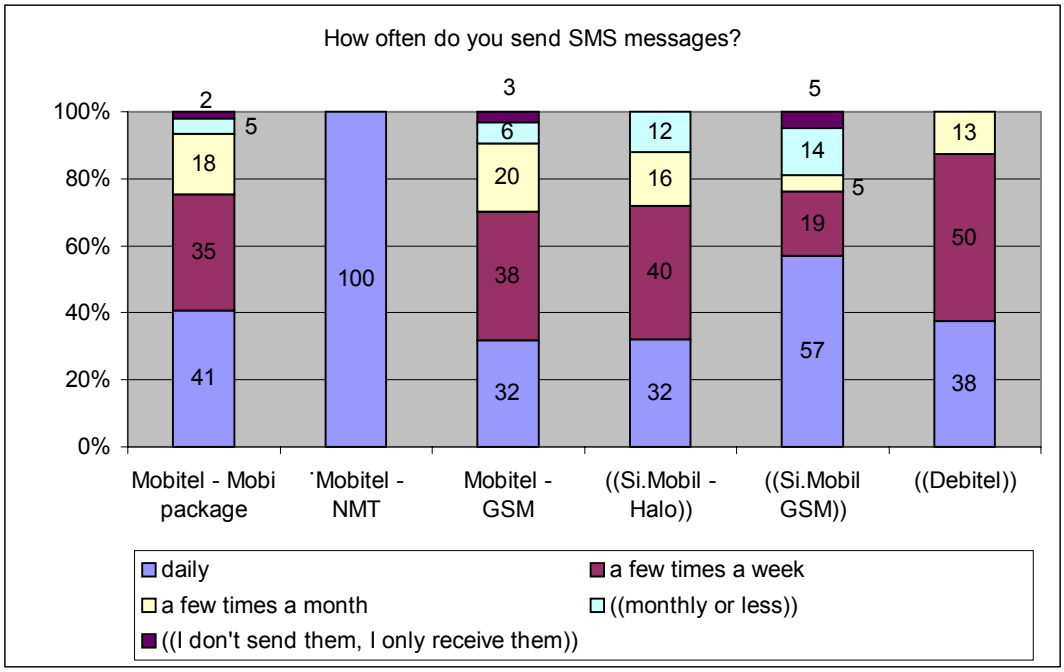
Graph 64: Use of SMS messages by the mobile devices' producers (June 2001).

The majority of SMS messages service users send the messages daily or a few times a week (75%). Others send these messages less often.



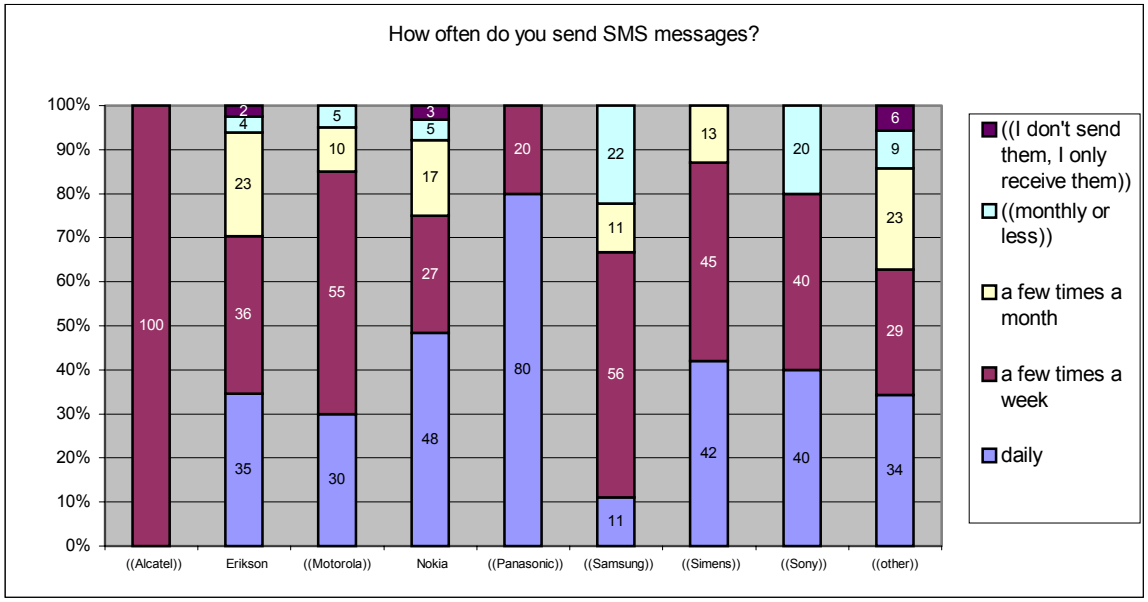
Graph 65: The frequency of sending SMS messages (June 2001).

The graph bellow indicates the frequency of sending SMS messages by the mobile operators' packages. Si.Mobil GSM has a larger share of users that send SMS messages daily, than Mobitel - GSM (the difference is statistically significant). Other shares are approximately the same.



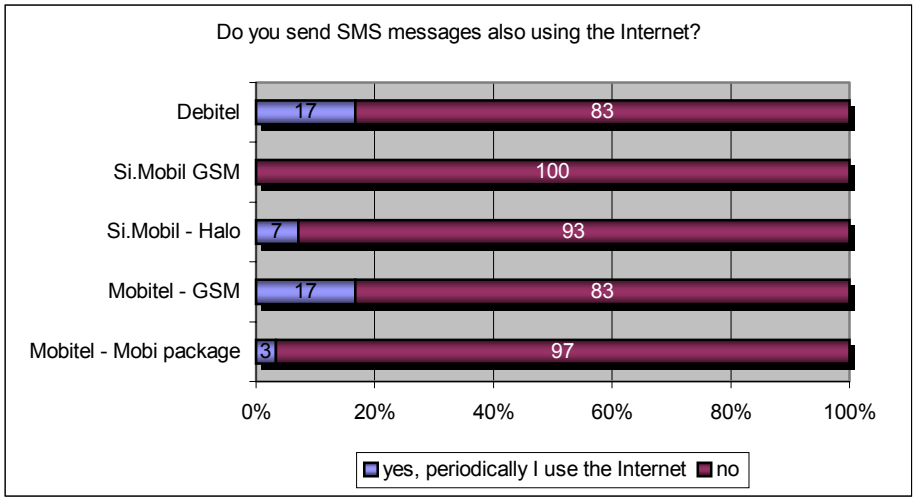
Graph 66: The frequency of sending SMS messages by mobile operators' packages (June 2001).

The following graph is showing the shares of frequency of sending SMS messages by the mobile devices' brands. The shares are inaccurate due to a small number of units. However, we can claim that Panasonic device users send more SMS messages daily than Ericsson device users.



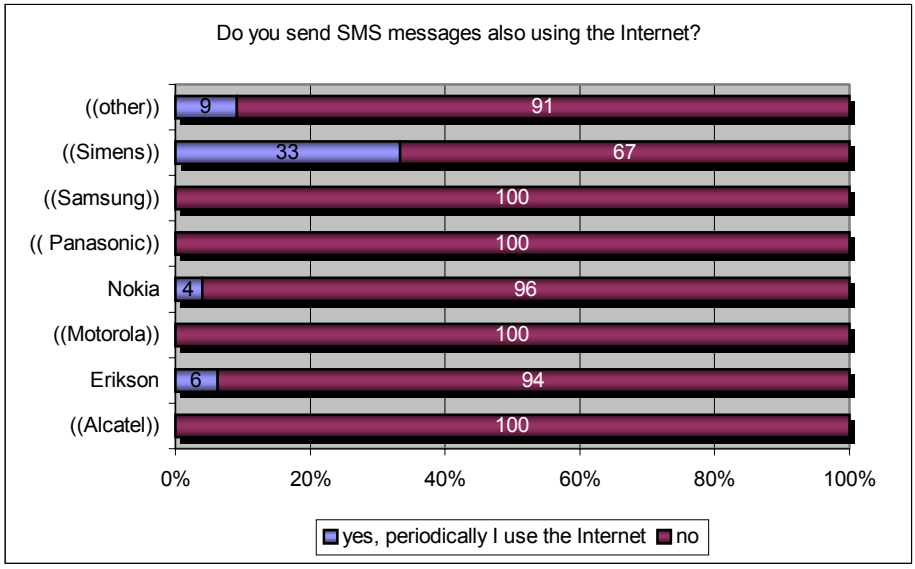
Graph 67: The shares of frequency of sending SMS messages by mobile devices' brands (June 2001).

The following graph indicates the share of SMS users that also use the computer and Internet to send the messages (although they personally do not use Internet regularly) by the mobile operators' packages. Here, however, only Internet non-regular users are included. The majority of users send SMS messages using their own mobile phone (on average 93%± 5%). The differences among the specific packages are not significant.



Graph 68: The share of users that do (not) send SMS messages using the Internet by the mobile operators' packages (June 2001). Only Internet non-users are included.

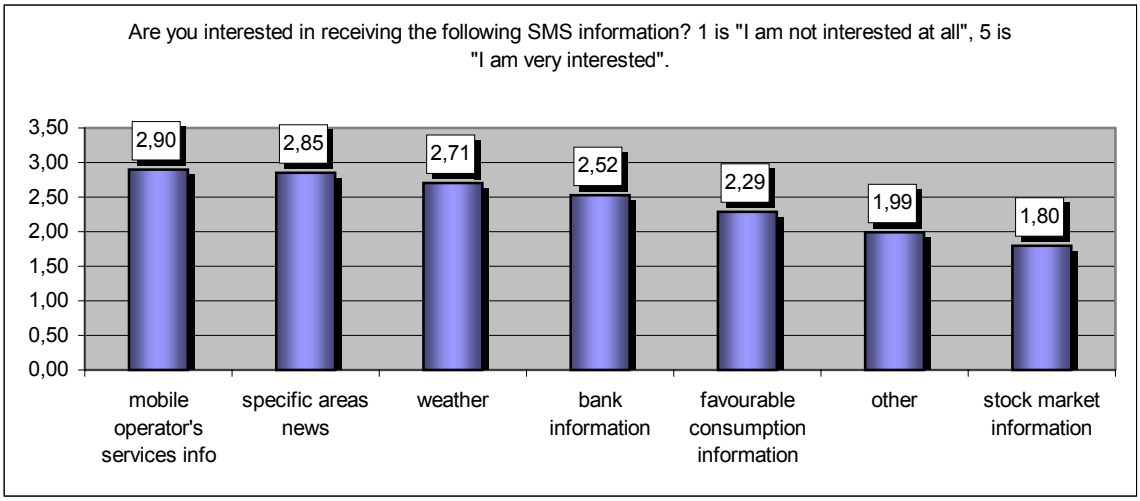
The graph bellow shows the shares of users that send SMS messages also by the Internet by the mobile devices' brand. Siemens users send more SMS messages using the Internet than Alcatel, Nokia, Motorola and Samsung users. The difference is statistically significant.



Graph 69: The shares of users that periodically send SMS messages using the Internet by mobile devices' brand (June 2001). Only Internet non-users are included.

7.2 The interest for SMS info service

In general there is relatively little interest in SMS info service - either the interest is neutral (I am neither interested nor not interested) or there is no interest. The SMS messages users (senders) are mostly not interested in receiving stock-market information, "other" information or information on "special offer" products. They are indifferent to receiving banking information, weather information, to receiving the news on specific areas and also to the information on mobile operators' services.

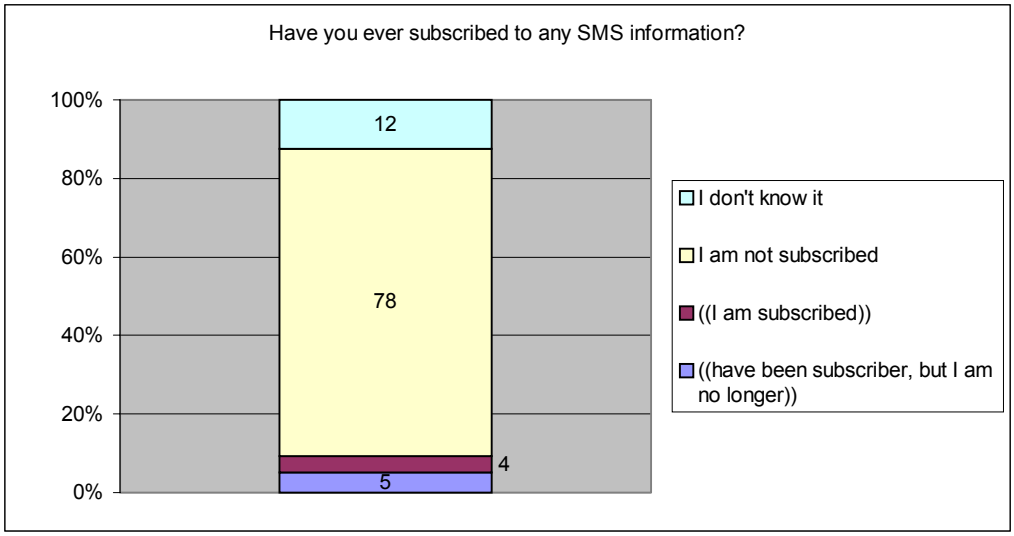


Graph 70: The interest in receiving specific SMS information - averages (June 2001, n=119 – 123).

	mobile operator info	specific aerea news	weather	bank information	favourable consumption information	other	stock information
	%	%	%	%	%	%	%
I am not interested	23	26	31	39	48	60	57
2	13	9	10	13	11	6	19
3	27	27	30	21	16	18	16
4	23	28	14	11	13	7	2
I am very interested	13	9	14	16	12	9	5

Table 11: The interest in receiving specific SMS information - averages (June 2001, n=119 – 123).

The shares of responses to the question "Have you ever been subscribed to any SMS information?" are the following: about 90% of mobile telephone users are not subscribed to SMS information or they do not know this service. About 4% of users are subscribed and 5% are those who have been, but no longer are SMS information subscribers.



Graph 71: The shares of mobile telephones users by their SMS information (non-) subscription (June 2001, n=263).

Those who are subscribed to SMS information service are subscribed to mobile operator information, to specific area news (sport, entertainment), to weather information and "other" information. For other quoted areas no SMS information user is subscribed. The shares are merely illustrative due to small number of units.

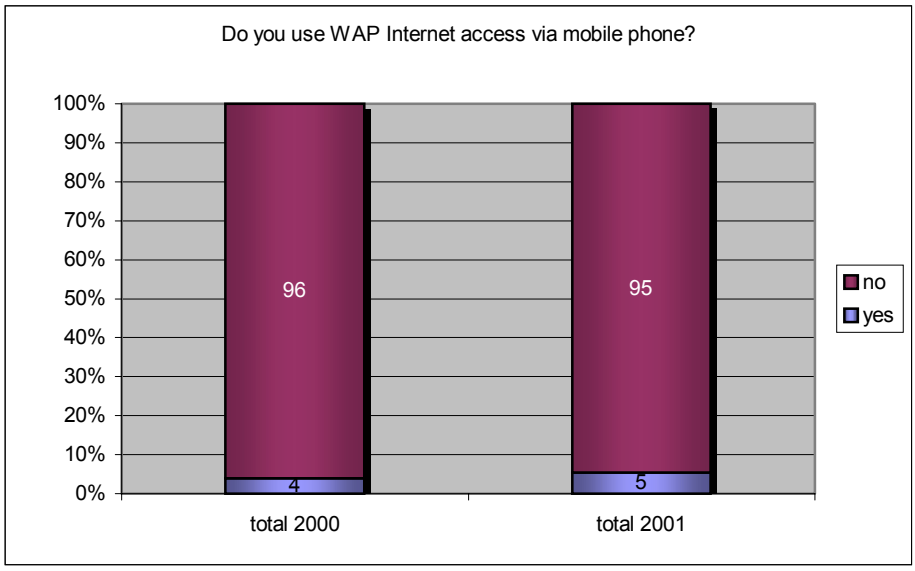
	Subscribed	Percentage	n
Mobile operator information	Yes	•47	2
Specific area news	Yes	•20	1
Other areas	Yes	•53	2
Weather	Yes	•51	2

Table 8: The shares of specific SMS information subscribers (June 2001).

Among the subscribers one respondent is already paying (•14%) SMS information subscription, but three (86%±35%) are not willing to pay for this service.

7.3 WAP Internet access

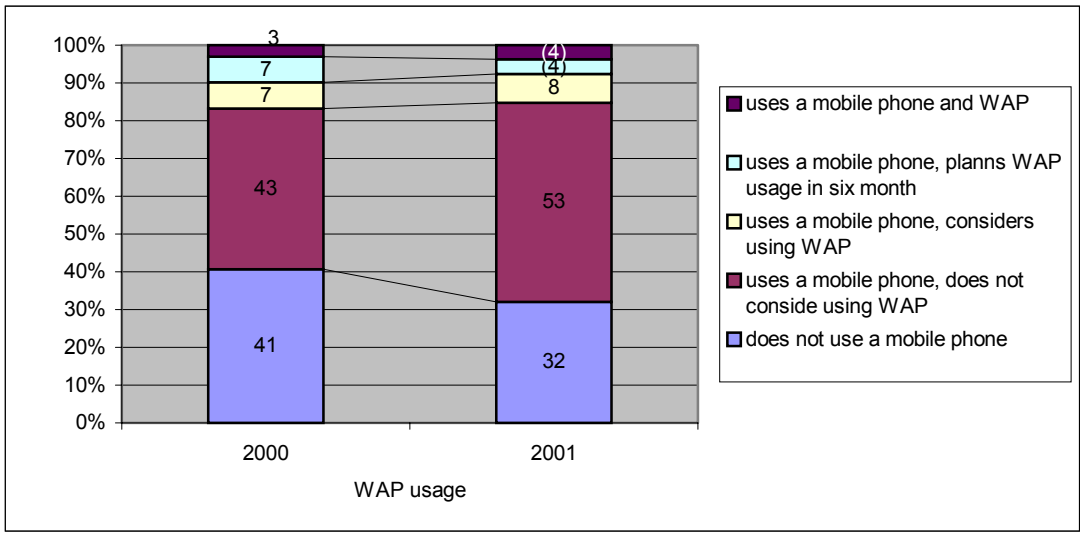
WAP Internet access via mobile phone is used by a small share of mobile telephone users - only about 5%(±2%). This share has remained approximately the same since December 2000.



Graph 72: WAP Internet access via mobile phone among mobile phone users (December 2000/June 2001).

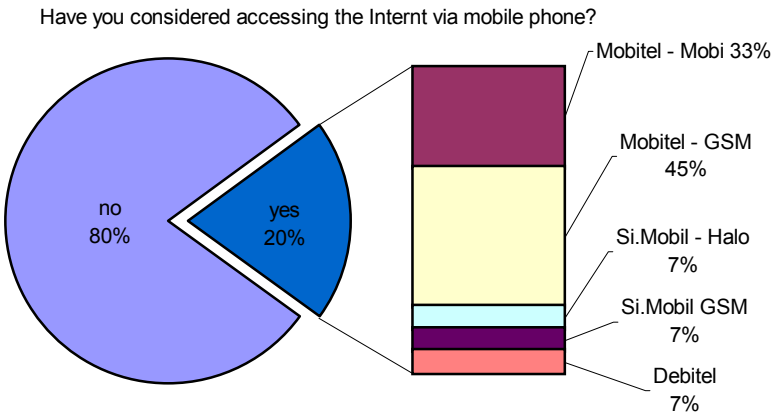
Let us take a closer look at mobile telephone users regarding the future use of WAP protocol.

In Slovenia WAP is used by 5% of users (confidence interval is 2% wide, in both directions). Less than 8% consider using WAP and about 4% plan the usage of WAP protocol in six months. The share of those who use mobile phone and do not consider using WAP has slightly increased in the last six months. The usage share itself has not followed the predictions.



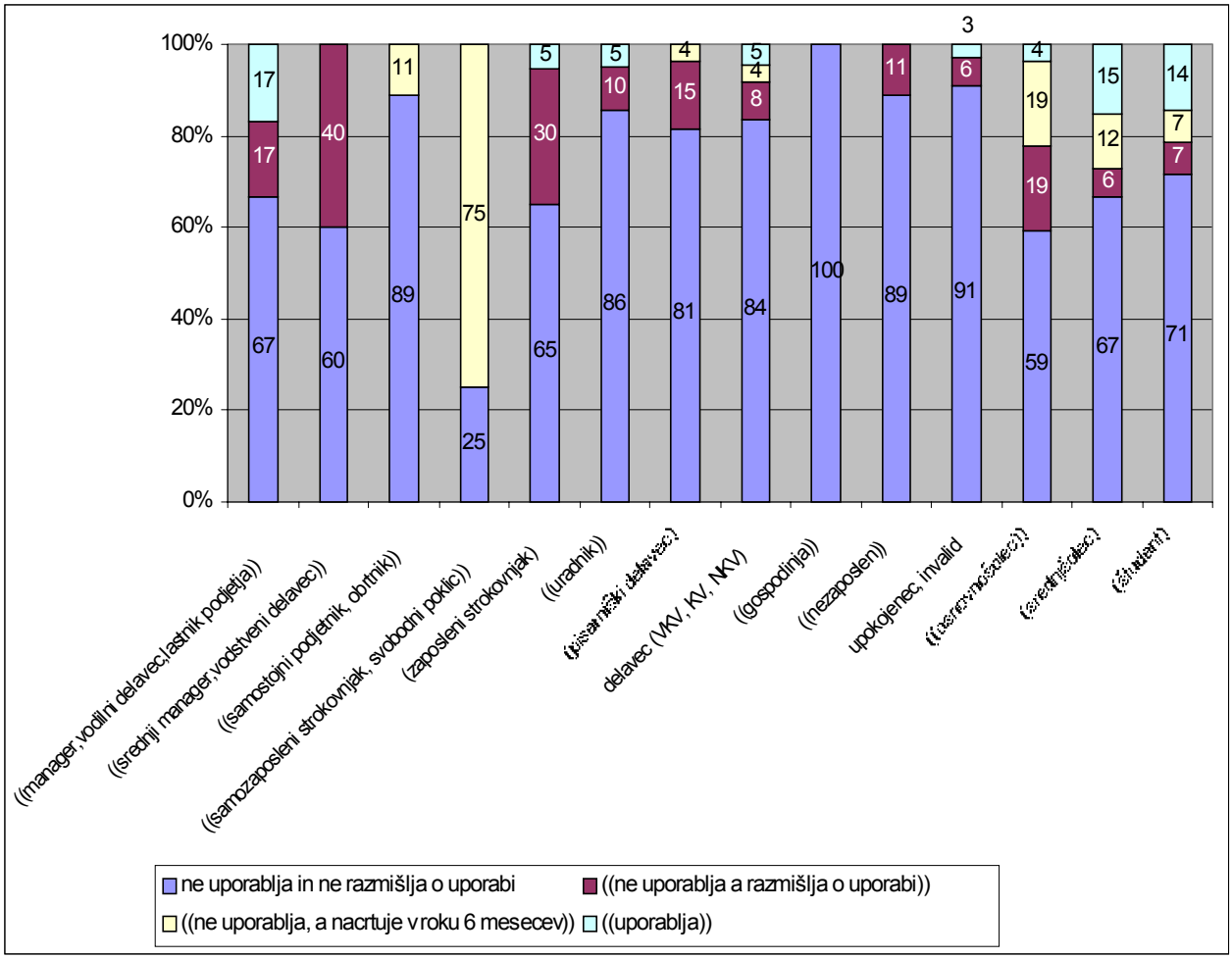
Graph 73: WAP usage in Slovenia (December 2000/June 2001).

Let us observe the above shares among mobile phone users and not in all target population. One-fifth of mobile phone users does not yet access Internet via mobile phone, but considers doing so. The majority of them are subscribers at Mobitel, which reflects the current structure of mobile telephone users.



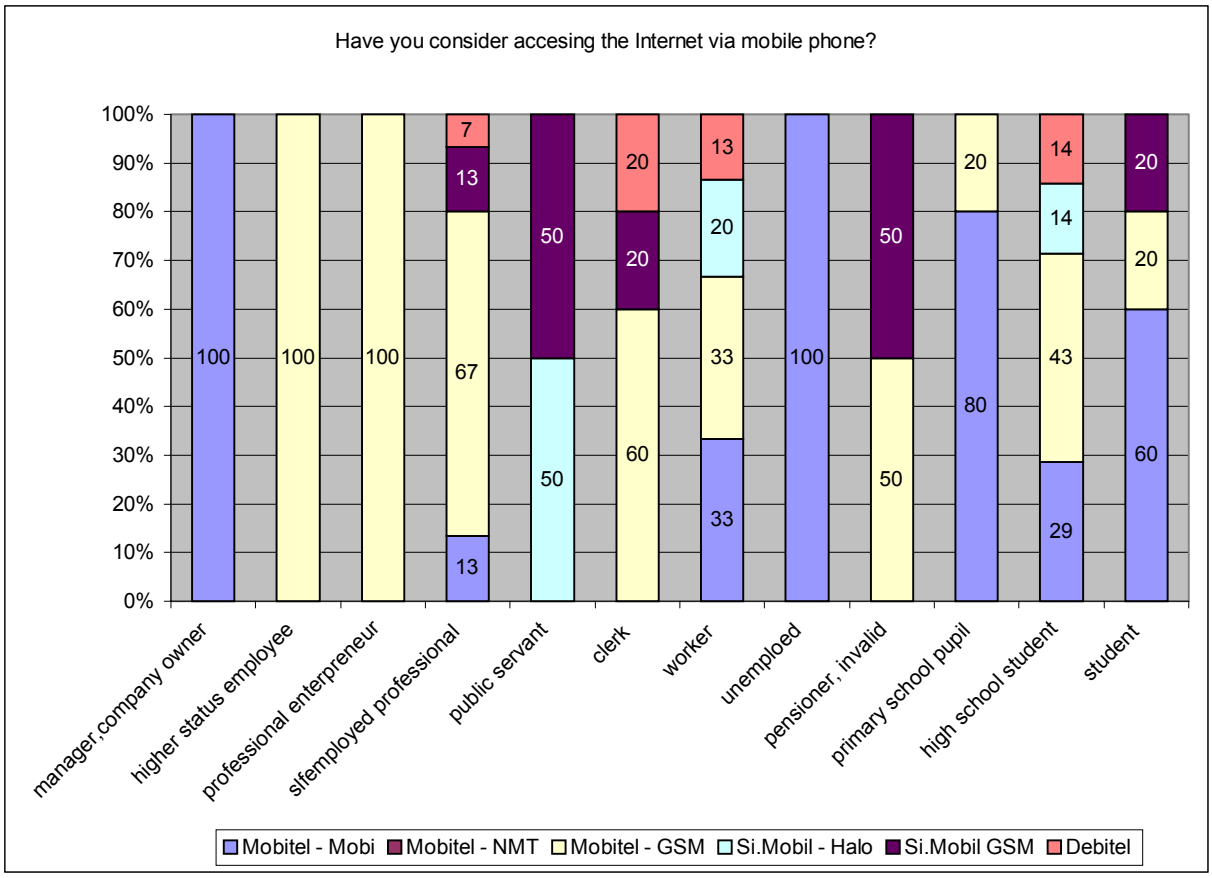
Graph 74: The share of mobile telephone users that consider WAP Internet access via mobile phone (June 2001).

Let us take a look at socio-demographic segments regarding the usage of and the interest in mobile Internet access. Higher status employee and self-employed professional are the ones who consider using the WAP protocol the most. WAP is though mostly used by managers, high school and university students.



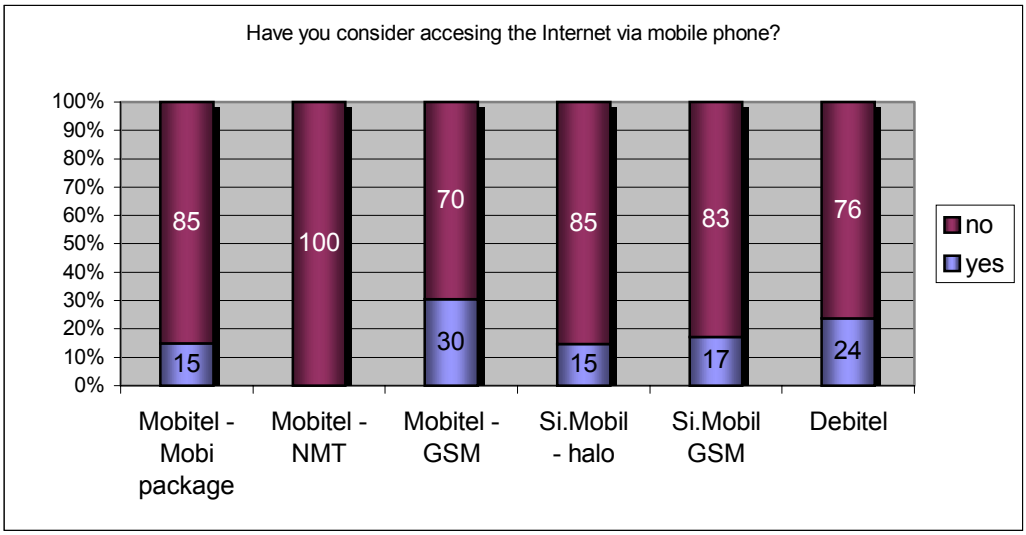
Graph 75: The use of WAP by employment status among mobile telephones users (June 2001).

Let us observe the employment structure of users that consider mobile Internet access regarding their current operator. It is evident that the structure of operators by employment status does not part substantially from the structure among all mobile telephone users. The shares are merely illustrative due to a small number of units.



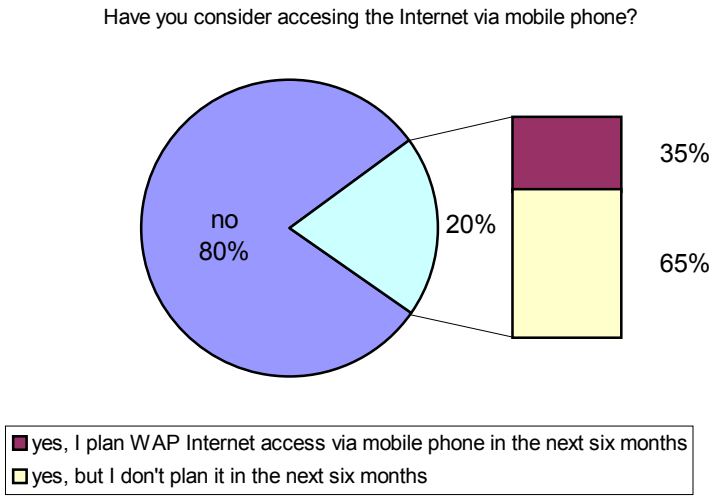
Graph 76: Users that consider mobile Internet access by the employment status and their operator (June 2001, n=68).

If we look at the users' structure by mobile telephone operators, the following is evident: the subscribers of Mobitel - GSM package consider the mobile Internet access the most, although the differences are not statistically significant.



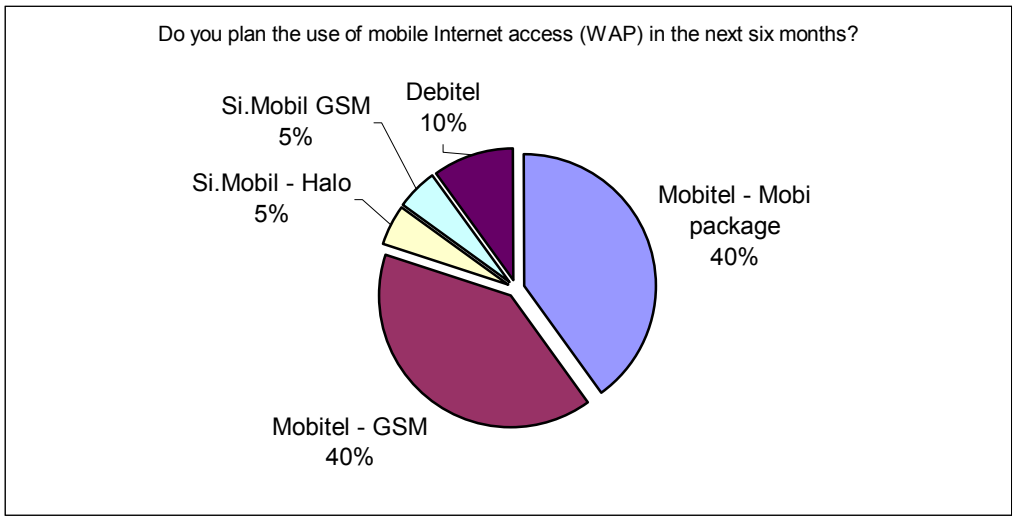
Graph 77: The mobile telephone users by the main operator (June 2001, n=68).

One-third of mobile telephone users that consider accessing Internet via mobile phone plan to do so in the next six months. This reflects relatively low motives for usage.



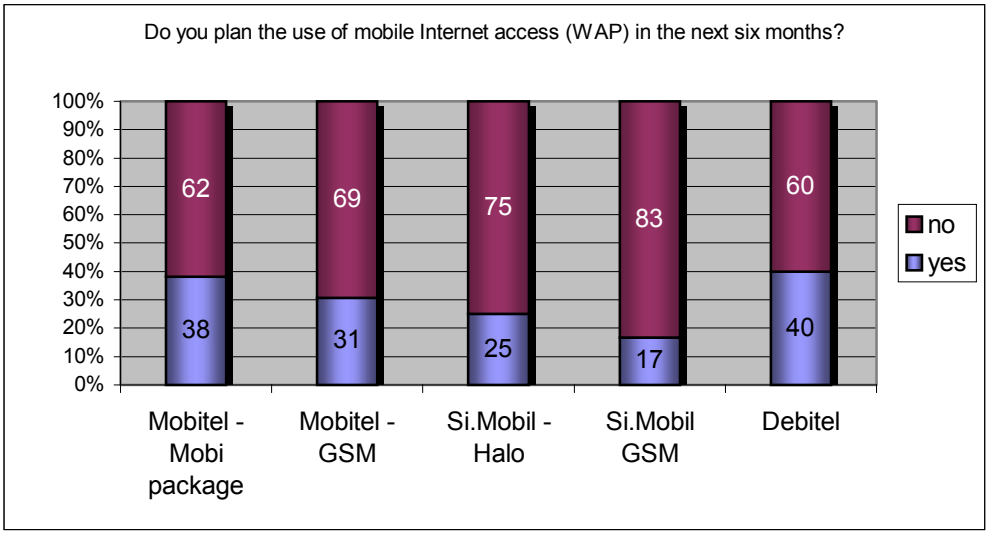
Graph 78: The share of mobile telephone users that consider accessing the Internet via mobile phone in the next six months (June 2001).

Among the users that plan accessing the Internet via mobile phone in the next six months the biggest share hold the users of Mobitel services. This reflects the current mobile telephone users' structure.



Graph 79: The structure of mobile telephones users that plan to access the Internet via mobile phone in the next six months (June 2001).

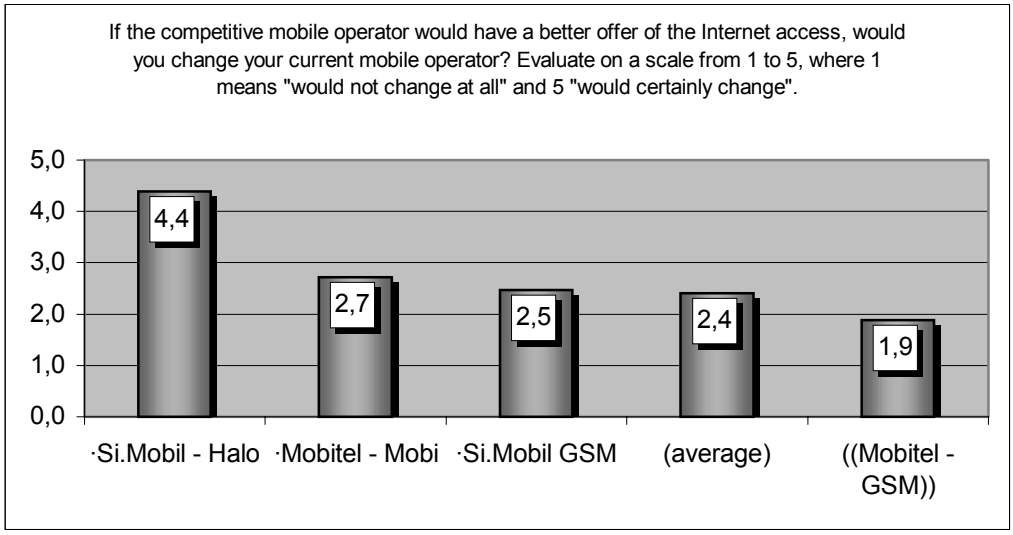
The shares of mobile telephone users that plan to use WAP protocol are approximately the same among all mobile operators' packages. The shares are merely illustrative and the differences are not statistically significant.



Graph 80: Users that consider the WAP usage (purchase planned in the next six months) by mobile telephone operators (June 2001).

7.4 Loyalty regarding WAP protocol among the WAP users

We asked the users that already use Internet access via mobile phone, if they would change to other mobile telephone operator if the latter would offer a better access to the Internet. The subscribers of Mobitel – GSM package are the least likely to change, while the Halo package subscribers are most likely to do so. The difference among subscribers of these two packages is statistically significant. It has to be taken into consideration that the estimates of averages are inaccurate due to small number of WAP users in the sample.



Graph 81: The loyalty of mobile telephone users regarding operators' offer of Internet access via mobile phone (June 2001, n = 19).

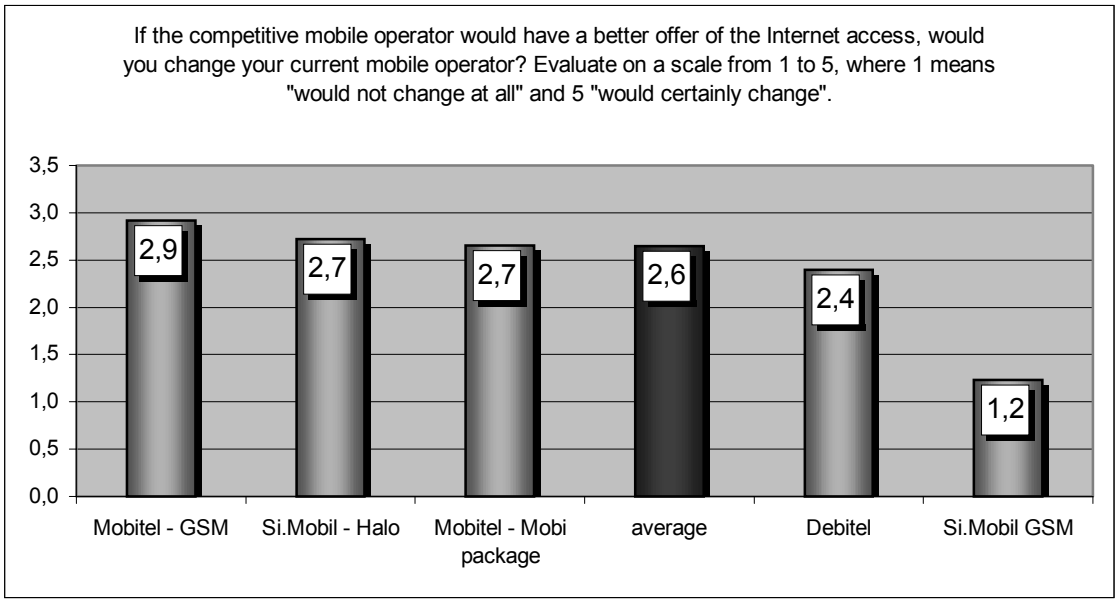
As we compare the December 2000 and June 2001 estimates we cannot claim that the averages among the users of specific packages have changed substantially in this period. The only visible difference is between Si.Mobil – Halo and Mobitel – GSM subscribers, which was not noticeable six months ago.

	Average estimate 2000	n 2000	std. error (se) 2000	Average estimate 2001	n 2001	std. error (se) 2001
Si.Mobil – Halo	2,22	4	0.7	4.4	2	0.6
Mobitel – Mobi	3.29	7	0.7	2.7	4	0.7
Si.Mobil GSM	1.00	1	-	2.5	3	1.4
Average	2.58	49	0.2	2.4	19	0.4
Mobitel – GSM	2.50	37	0.2	1.9	10	0.4

Table 12: The loyalty of mobile telephone users regarding operators' offer of Internet access via mobile phone (December 2000, n=49/June 2001, n = 19).

7.5 Loyalty regarding the WAP protocol among the future WAP users

Users of Si.Mobil – GSM package that do not yet use WAP Internet access via mobile phone but are considering it are the least likely to change the mobile telephone operator if other operator would offer better Internet access. The difference from the Mobitel - GSM and Si.Mobil - Halo subscribers, which are more likely to do so, is statistically significant. There are no differences among other mobile telephone users.



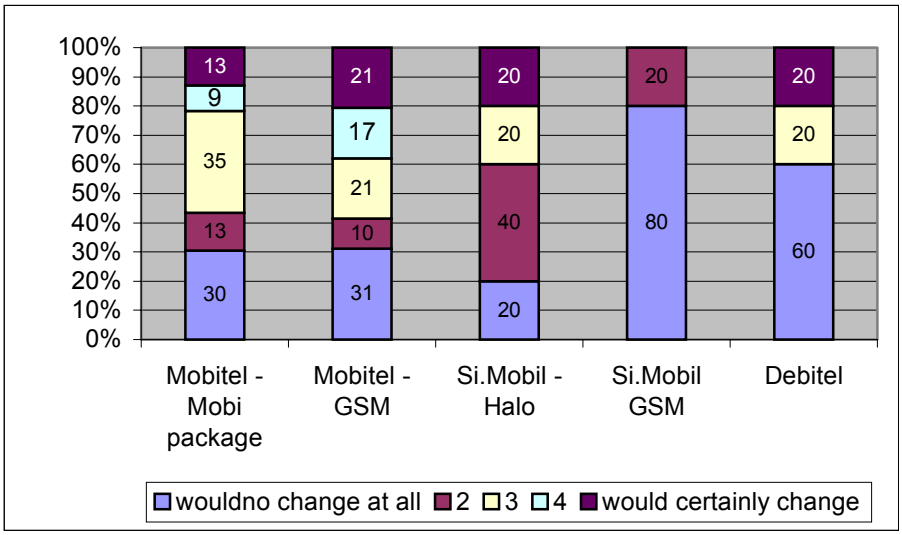
Graph 82: Loyalty of future WAP users by the operator – average estimate (June 2001).

As we compare the averages with the ones six months ago, an increase of loyalty among future WAP users at Debitel and Si.Mobil – GSM is visible. Other averages remained relatively the same.

If the competitive mobile operator would have a better offer of the Internet access, would you change your current mobile operator?						
	WAP users			**Future WAP users**		
	Average estimate 2000	n	se	Average estimate 2001	n	se
Mobitel - GSM	2.50	37	0.2	2.9	29	0.29
Si.Mobil - Halo	2,22	4	0.7	2.7	5	0.76
Mobitel - Mobi	3.29	7	0.7	2.7	23	0.29
Average	2.58	49	0.2	2.6	66	0.18
Debitel	-	-	-	2.4	5	0.89
Si.Mobil GSM	1.00	1	-	1.2	5	0.21

Table 13: Loyalty of future WAP users by the operator – average estimate (December 2000/June 2001).

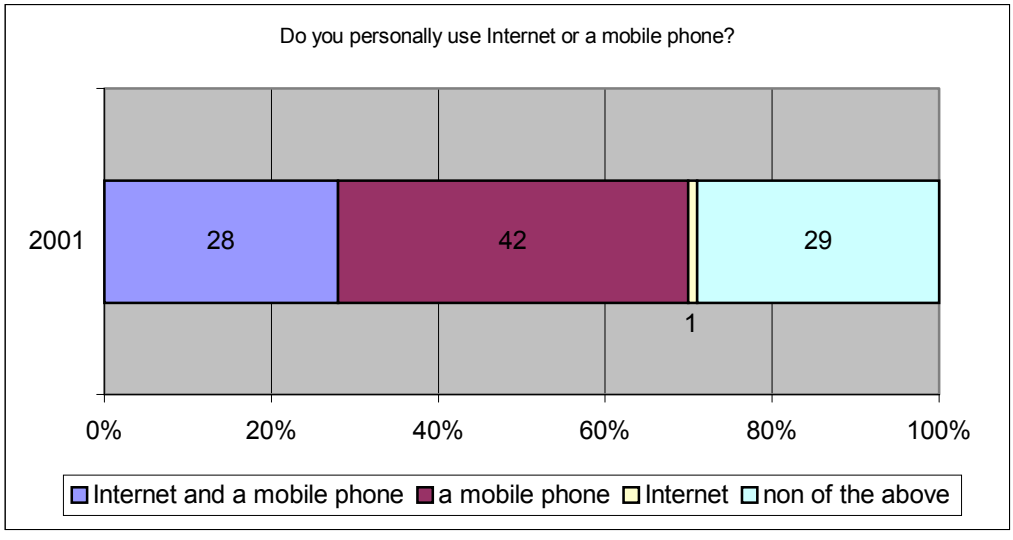
The biggest share of loyal users that would not change their operator under any circumstances holds Si.Mobil – GSM, followed by subscribers at Debitel. The shares are small and thus inaccurate.



Graph 83: Loyalty of mobile telephones users regarding operators' offer of Internet access via mobile phone (June 2001).

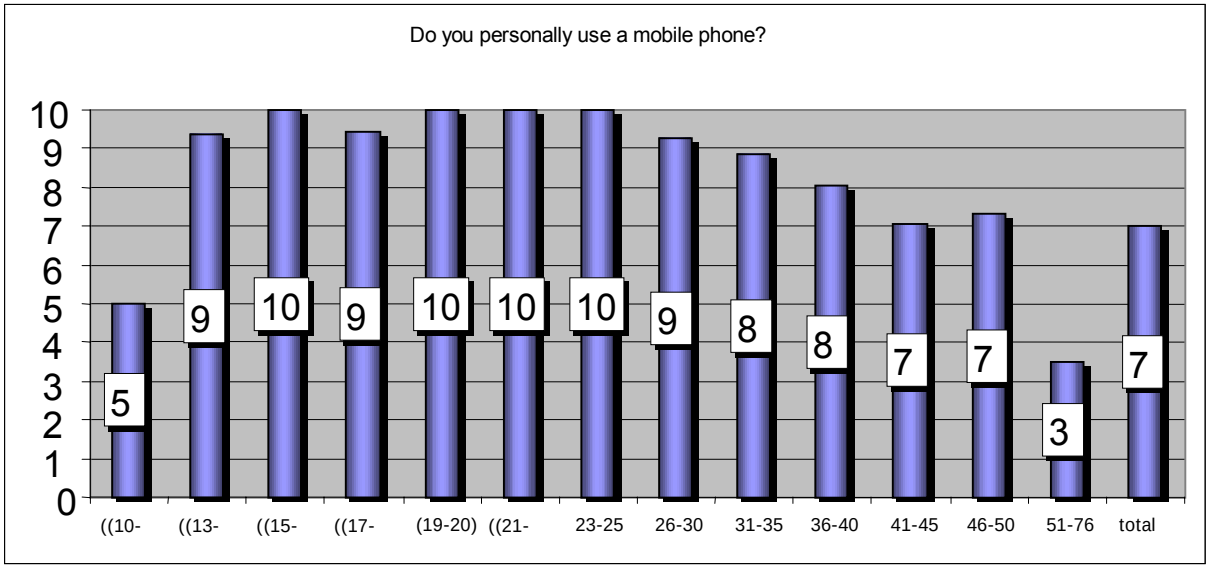
7.6 Usage of Internet and of mobile phone

Almost 70 % of the target population uses mobile phone, while Internet is used by less than a third of population. Almost all users of Internet also use mobile phone. In the last six months the share of those who use Internet and mobile phone has increased, while the share of those who use neither of them has decreased (the differences are statistically significant).



Graph 84: The use of the Internet and mobile telephones among active Slovenian population (June 2001 n=529).

The largest share of mobile telephone users is in the age group from 15 to 25 years. The graph shows that the share of mobile telephone users is increasing till the age of 25 and than it begins to fall.



Graph 85: The use of Internet and mobile telephones according to the age group (June 2001, n=529).

If we observe the situation six month ago we can notice an increase of mobile phone ownership in all age groups. The biggest increase is in the age group from 13 to 14 years. The increase in the youngest and the oldest segment of population is negligible.

The table bellow indicates that among mobile telephone users there are no clear patterns of the Internet use that could be connected to age groups. For example, in age group from 13 to 14 the share of mobile telephone users is bigger among Internet users (than Internet non-users), but in age group 17 to 18 the share of mobile telephone users is bigger among Internet non-users (100 % vs. 89 %).

Do you personally use a mobile phone?	Internet nonusers (%)		Internet users (%)		Total 2001(%)		Total 2000 (%)	
Age	yes	no	yes	No	yes	no	yes	no
10-12	43	57	100		50	50	49	51
13-14	90	10	100		94	6	68	32
15-16	100		100		100		82	18
17-18	100		89	11	94	6	87	13
19-20	100		100		100		80	20
21-22	100		100		100		82	18
23-25	100		100		100		89	11
26-30	87	13	100		93	7	79	21
31-35	90	10	91	9	89	11	70	30
36-40	70	30	100		80	20	60	40
41-45	59	41	93	7	71	29	59	41
46-50	70	30	90	10	73	27	56	44
51-76	33	67	78	22	35	65	30	70
Total	60	40	96	4	70	30	59	41

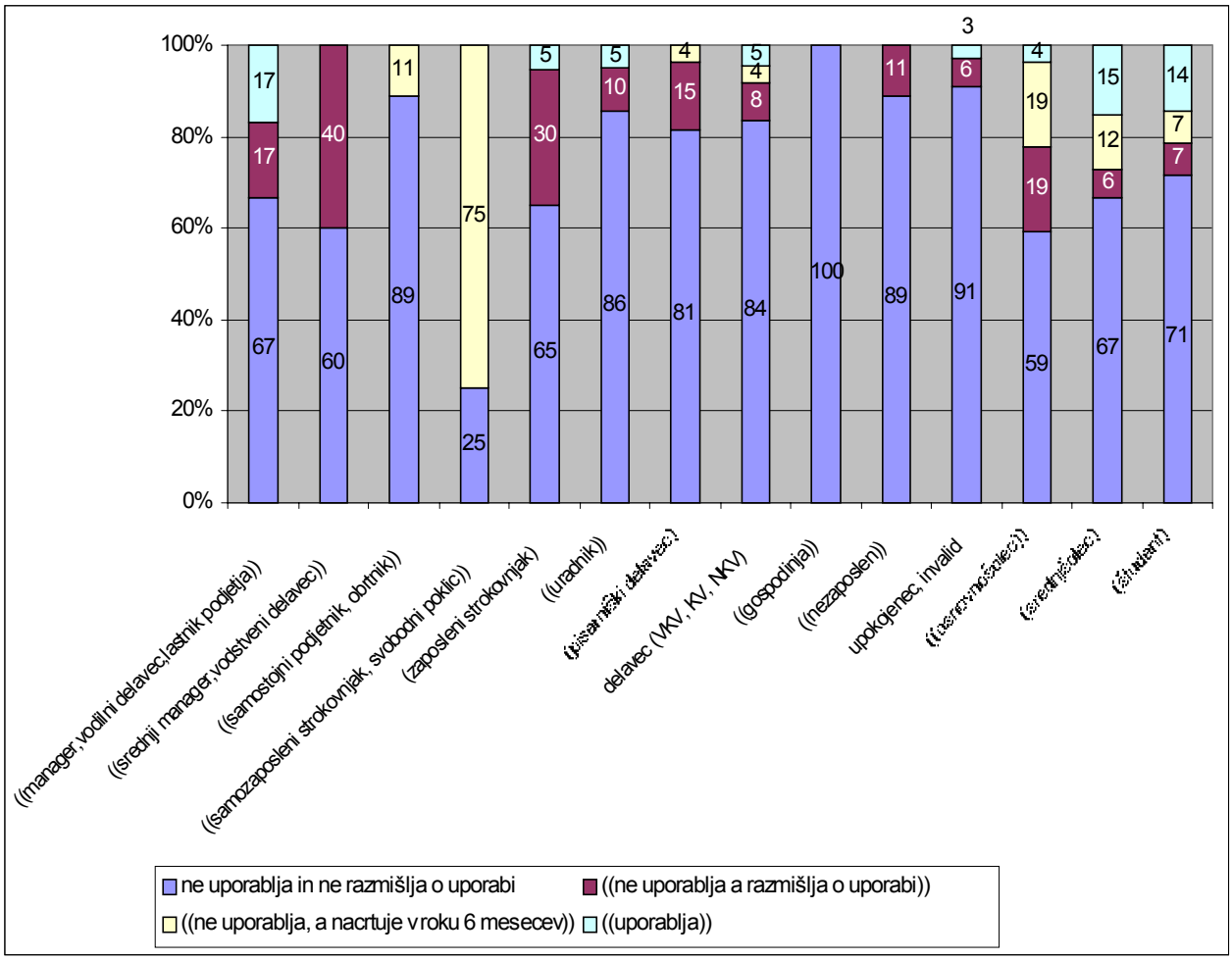
Table 14: The use of the Internet and mobile telephones among active Slovenian population by age groups (December 2000, n=2049/June, n = 529).

In the table bellow we can see that, for example, only 2% of persons who use both a mobile phone and Internet are in the age group 10 to 12, while the majority of such persons are in the age group 23 to 30 years. The shares remained practically the same as in December 2000.

Do you personally use a mobile phone?	Internet nonusers (%)	Internet users (%)	Total 2001 (%)	Total 2000 (%)
Age	yes	yes	yes	Yes
10 – 12	4	2	3	3
13 – 14	4	4	4	4
15 – 16	3	3	3	4
17 – 18	4	5	4	6
19 – 20	5	6	5	5
21 – 22	4	5	4	4
23 – 25	5	16	9	8
26 – 30	11	16	13	12
31 – 35	11	13	12	12
36 – 40	9	10	9	9
41 – 45	8	9	9	10
46 – 50	13	6	10	9
51 – 75	21	4	14	13
Total	100	100	100	100

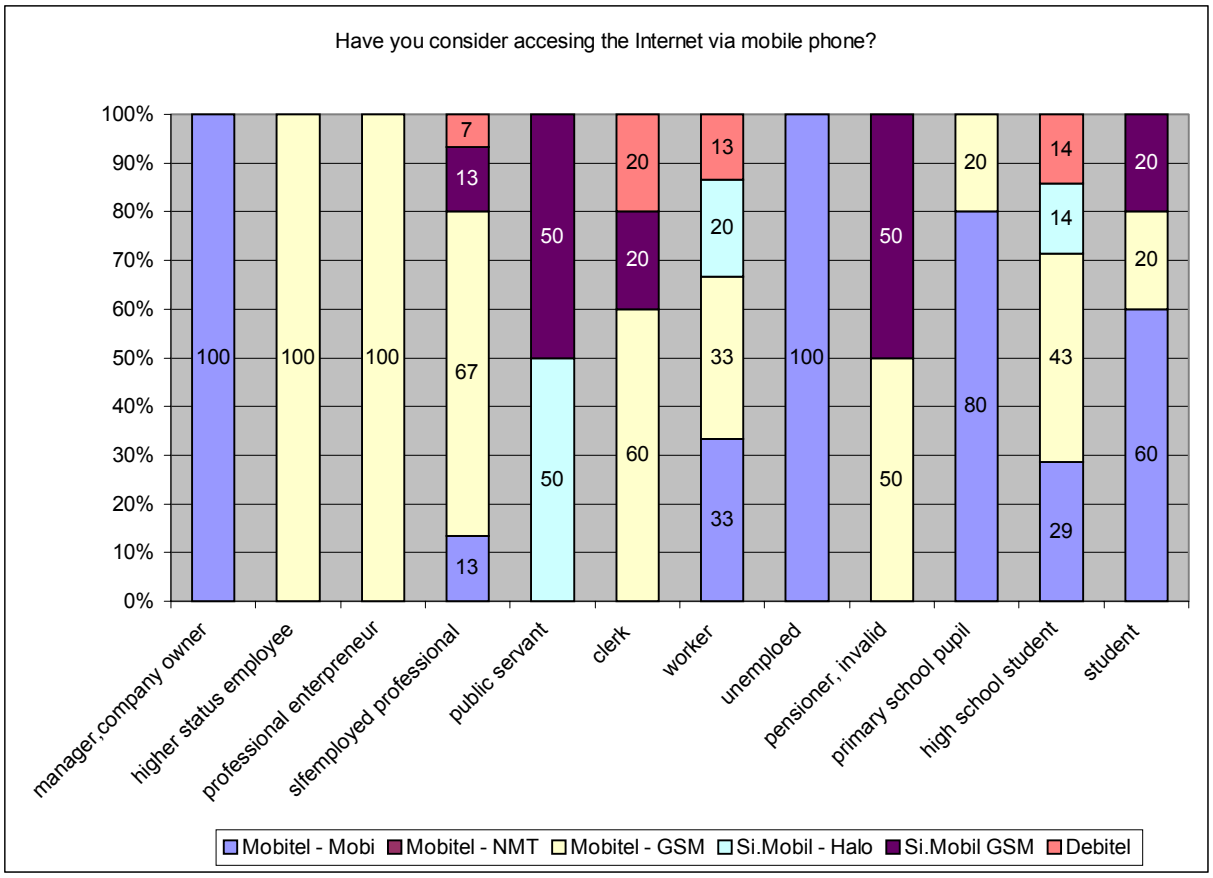
Table 15: Age structure of mobile telephones users by the use of the Internet (December 2000, n=2049/June 2001, n = 529).

Let us take a look at socio-demographic segments regarding the usage of and the interest in mobile Internet access. Higher status employee and self-employed professional are the ones who consider using the WAP protocol the most. WAP is though mostly used by managers, high school and university students.



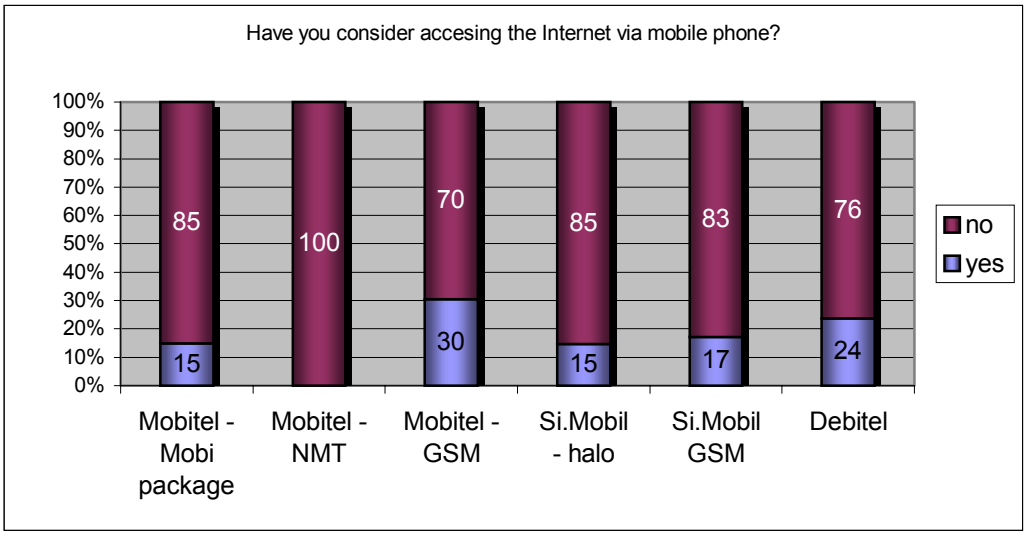
Graph 86: The use of WAP by employment status among mobile telephones users (June 2001).

Let us observe the employment structure of users that consider mobile Internet access regarding their current operator. It is evident that the structure of operators by employment status does not part substantially from the structure among all mobile telephone users. The shares are merely illustrative due to a small number of units.



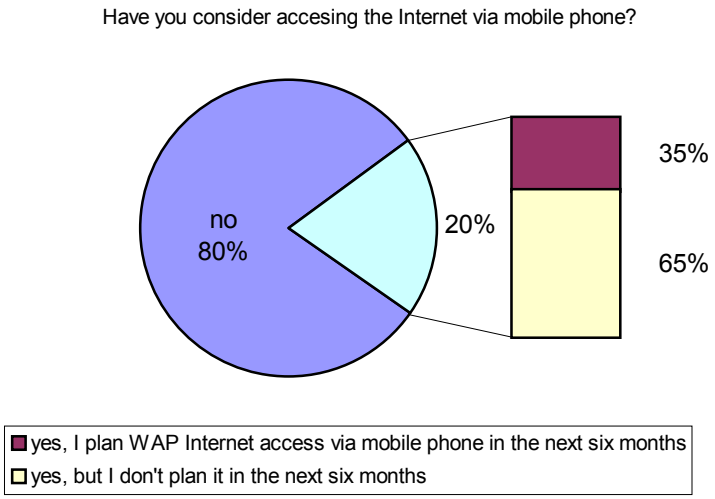
Graph 87: Users that consider mobile Internet access by the employment status and their operator (June 2001, n=68).

If we look at the users' structure by mobile telephone operators, the following is evident: the subscribers of Mobitel - GSM package consider the mobile Internet access the most, although the differences are not statistically significant.



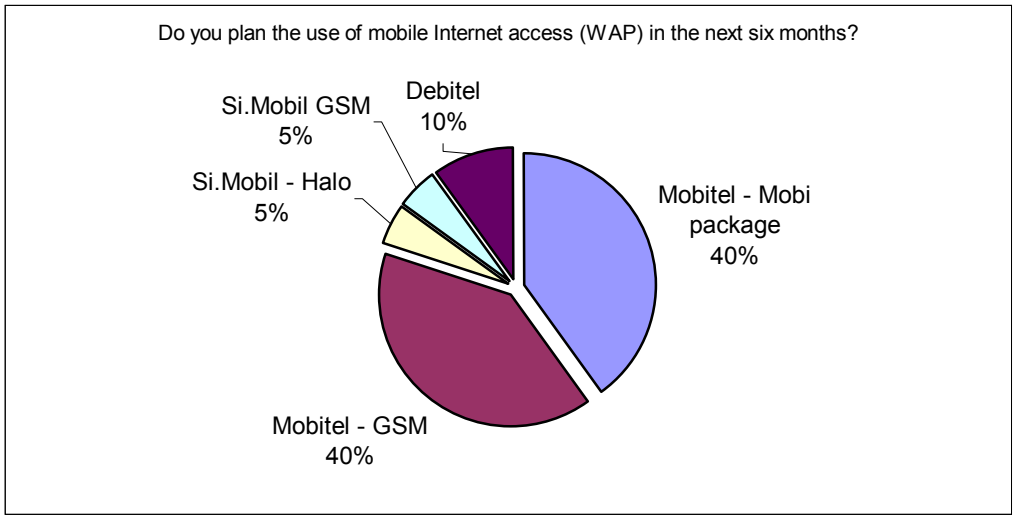
Graph 88: The Internet and mobile telephone users by the main operator (June 2001, n=68).

One-third of mobile telephone users that consider accessing Internet via mobile phone plan to do so in the next six months. This reflects relatively low motives for usage.



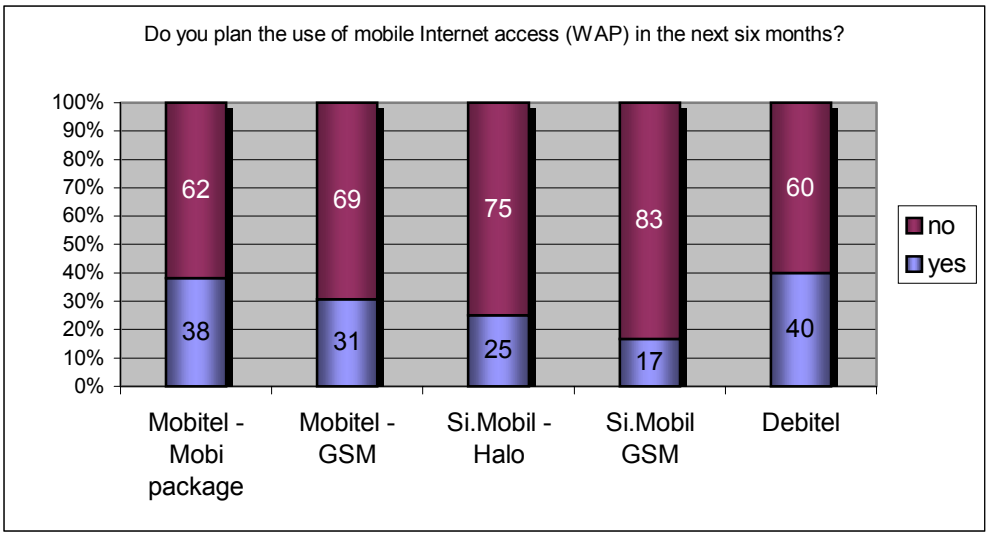
Graph 89: The share of mobile telephone users that consider accessing the Internet via mobile phone in the next six months (June 2001).

Among the users that plan accessing the Internet via mobile phone in the next six months the biggest share hold the users of Mobitel services. This reflects the current mobile telephone users' structure.



Graph 90: The structure of mobile telephones users that plan to access the Internet via mobile phone in the next six months (June 2001).

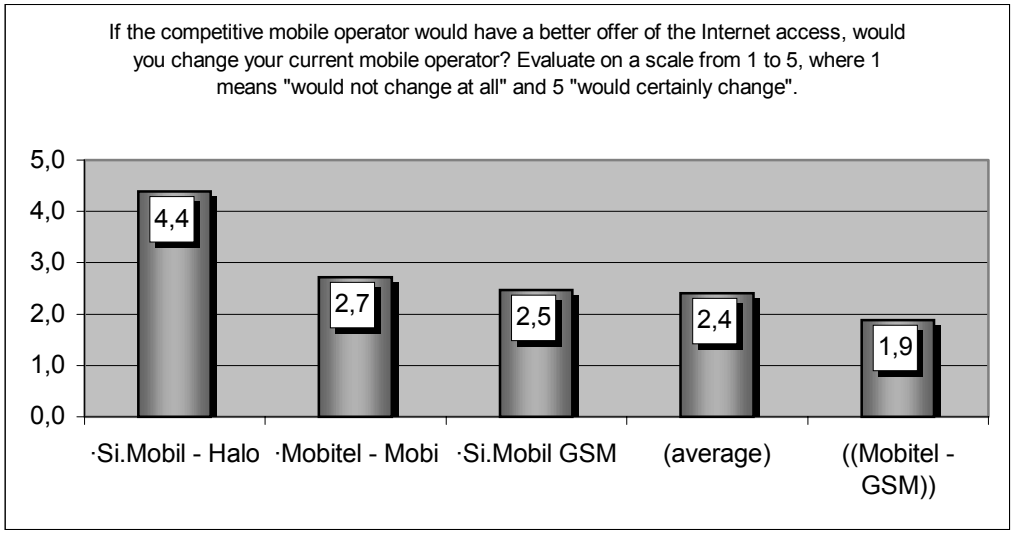
The shares of mobile telephone users that plan to use WAP protocol are approximately the same among all mobile operators' packages. The shares are merely illustrative and the differences are not statistically significant.



Graph 91: Users that consider the WAP usage (purchase planned in the next six months) by mobile telephone operators (June 2001).

7.7 Loyalty regarding WAP protocol among the WAP users

We asked the users that already use Internet access via mobile phone, if they would change to other mobile telephone operator if the latter would offer a better access to the Internet. The subscribers of Mobitel – GSM package are the least likely to change, while the Halo package subscribers are most likely to do so. The difference among subscribers of these two packages is statistically significant. It has to be taken into consideration that the estimates of averages are inaccurate due to small number of WAP users in the sample.



Graph 92: The loyalty of mobile telephone users regarding operators' offer of Internet access via mobile phone (June 2001, n = 19).

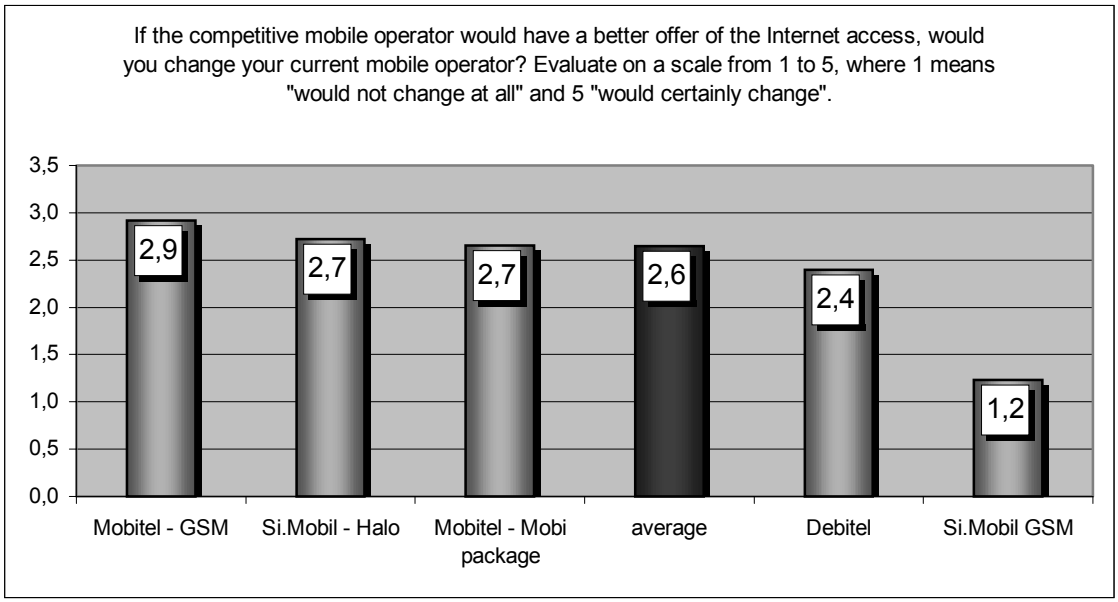
As we compare the December 2000 and June 2001 estimates we cannot claim that the averages among the users of specific packages have changed substantially in this period. The only visible difference is between Si.Mobil – Halo and Mobitel – GSM subscribers, which was not noticeable six months ago.

	Average estimate 2000	n 2000	std. error (se) 2000	Average estimate 2001	n 2001	std. error (se) 2001
Si.Mobil – Halo	2,22	4	0.7	4.4	2	0.6
Mobitel – Mobi	3.29	7	0.7	2.7	4	0.7
Si.Mobil GSM	1.00	1	-	2.5	3	1.4
Average	2.58	49	0.2	2.4	19	0.4
Mobitel – GSM	2.50	37	0.2	1.9	10	0.4

Table 16: The loyalty of mobile telephone users regarding operators' offer of Internet access via mobile phone (December 2000, n=49/June 2001, n = 19).

7.8 Loyalty regarding the WAP protocol among the future WAP users

Users of Si.Mobil – GSM package that do not yet use WAP Internet access via mobile phone but are considering it are the least likely to change the mobile telephone operator if other operator would offer better Internet access. The difference from the Mobitel - GSM and Si.Mobil - Halo subscribers, which are more likely to do so, is statistically significant. There are no differences among other mobile telephone users.



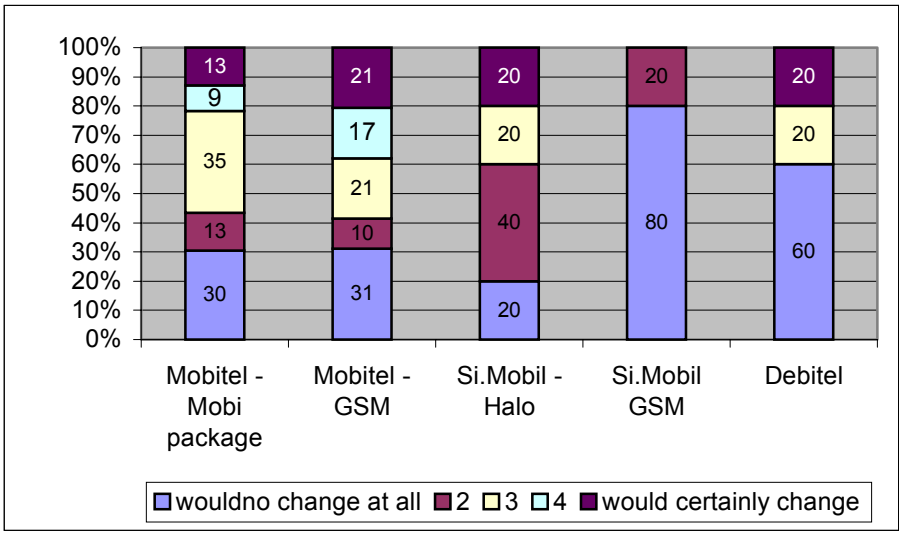
Graph 93: Loyalty of future WAP users by the operator – average estimate (June 2001).

As we compare the averages with the ones six months ago, an increase of loyalty among future WAP users at Debitel and Si.Mobil – GSM is visible. Other averages remained relatively the same.

If the competitive mobile operator would have a better offer of the Internet access, would you change your current mobile operator?						
	WAP users			**Future WAP users**		
	Average estimate 2000	n	se	Average estimate 2001	n	se
Mobitel - GSM	2.50	37	0.2	2.9	29	0.29
Si.Mobil - Halo	2,22	4	0.7	2.7	5	0.76
Mobitel - Mobi	3.29	7	0.7	2.7	23	0.29
Average	2.58	49	0.2	2.6	66	0.18
Debitel	-	-	-	2.4	5	0.89
Si.Mobil GSM	1.00	1	-	1.2	5	0.21

Table 17: Loyalty of future WAP users by the operator – average estimate (December 2000/June 2001).

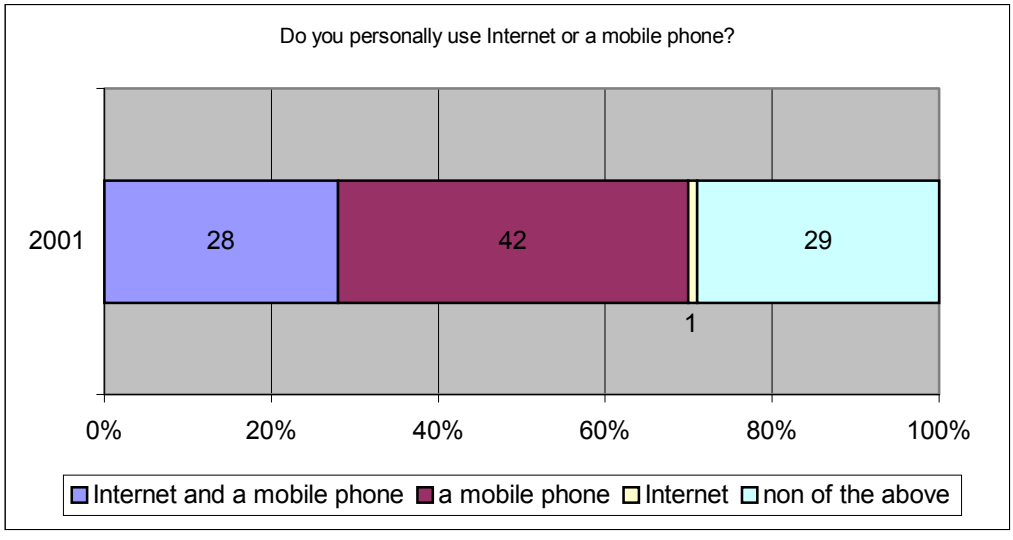
The biggest share of loyal users that would not change their operator under any circumstances holds Si.Mobil – GSM, followed by subscribers at Debitel. The shares are small and thus inaccurate.



Graph 94: Loyalty of mobile telephones users regarding operators' offer of Internet access via mobile phone (June 2001).

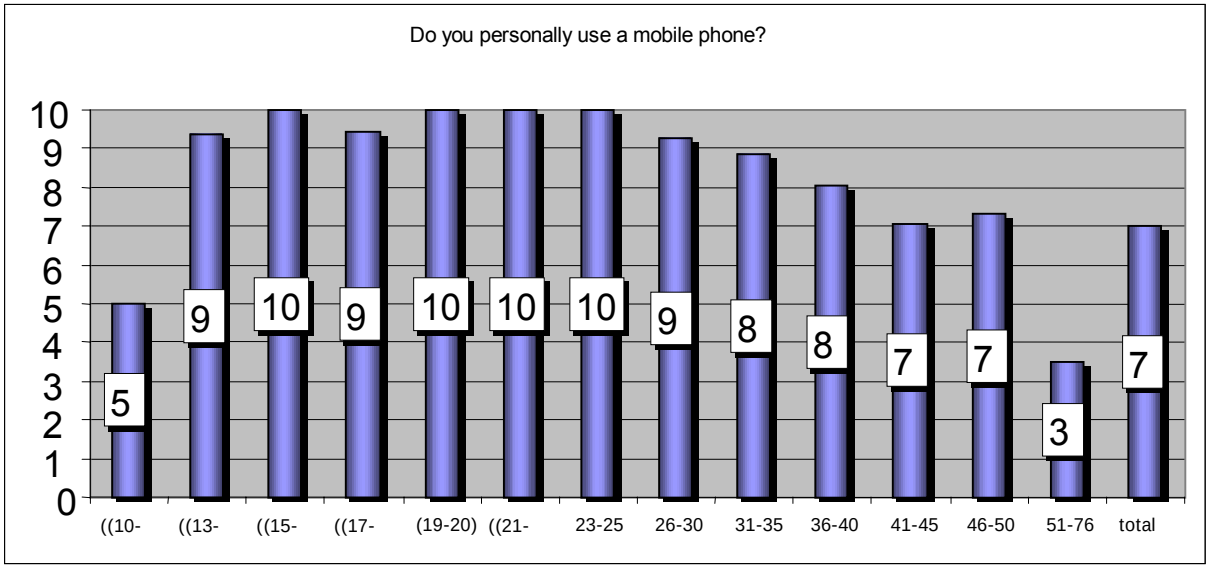
7.9 Usage of Internet and of mobile phone

Almost 60 % of population use mobile phone, while Internet is used by less than a third of population. Almost all users of Internet also use mobile phone. In the last six months the share of those who use Internet and mobile phone has increased, while the share of those who use neither of them has decreased (the differences are statistically significant).



Graph 95: The use of the Internet and mobile telephones among active Slovenian population (June 2001 n=529).

The largest share of mobile telephone users is in the age group from 15 to 25 years. The graph shows that the share of mobile telephone users is increasing till the age of 25 and than it begins to fall.



Graph 96: The use of Internet and mobile telephones according to the age group (June 2001, n=529).

If we observe the situation six month ago we can notice an increase of mobile phone ownership in all age groups. The biggest increase is in the age group from 13 to 14 years. The increase in the youngest and the oldest segment of population is negligible.

The table bellow indicates that among mobile telephone users there are no clear patterns of the Internet use that could be connected to age groups. For example, in age group from 13 to 14 the share of mobile telephone users is bigger among Internet users (than Internet non-users), but in age group 17 to 18 the share of mobile telephone users is bigger among Internet non-users (100 % vs. 89 %).

Do you personally use a mobile phone?	Internet nonusers (%)		Internet users (%)		Total 2001(%)		Total 2000 (%)	
Age	yes	no	yes	No	yes	no	yes	no
10-12	43	57	100		50	50	49	51
13-14	90	10	100		94	6	68	32
15-16	100		100		100		82	18
17-18	100		89	11	94	6	87	13
19-20	100		100		100		80	20
21-22	100		100		100		82	18
23-25	100		100		100		89	11
26-30	87	13	100		93	7	79	21
31-35	90	10	91	9	89	11	70	30
36-40	70	30	100		80	20	60	40
41-45	59	41	93	7	71	29	59	41
46-50	70	30	90	10	73	27	56	44
51-76	33	67	78	22	35	65	30	70
Total	60	40	96	4	70	30	59	41

Table 18: The use of the Internet and mobile telephones among active Slovenian population by age groups (December 2000, n=2049/June, n = 529).

In the table bellow we can see that, for example, only 2% of persons who use both a mobile phone and Internet are in the age group 10 to 12, while the majority of such persons are in the age group 23 to 30 years. The shares remained practically the same as in December 2000.

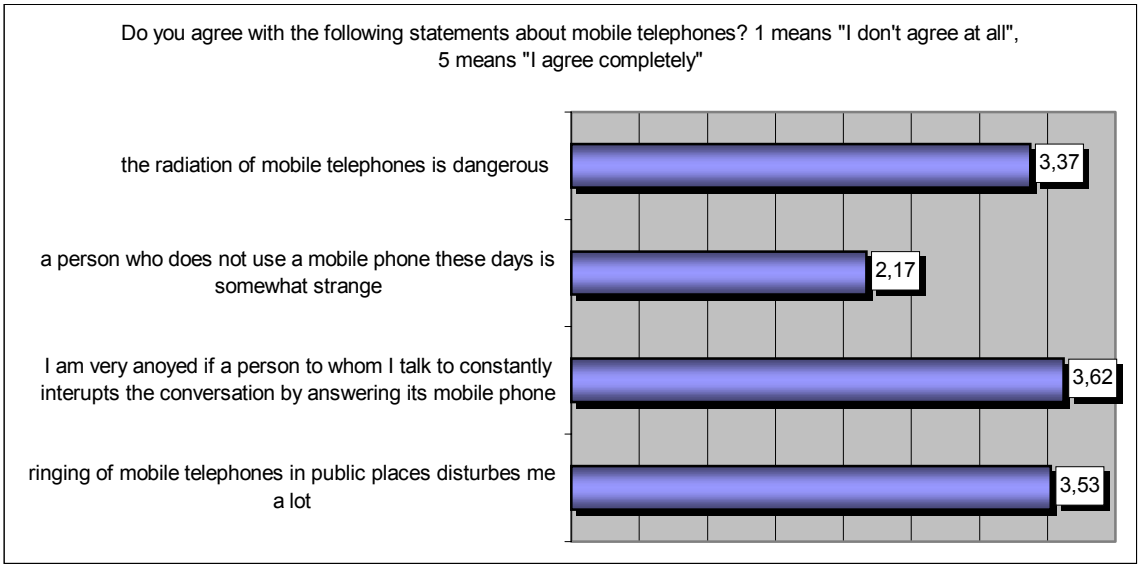
Do you personally use a mobile phone?	Internet nonusers (%)	Internet users (%)	Total 2001 (%)	Total 2000 (%)
Age	yes	yes	yes	Yes
10 – 12	4	2	3	3
13 – 14	4	4	4	4
15 – 16	3	3	3	4
17 – 18	4	5	4	6
19 – 20	5	6	5	5
21 – 22	4	5	4	4
23 – 25	5	16	9	8
26 – 30	11	16	13	12
31 – 35	11	13	12	12
36 – 40	9	10	9	9
41 – 45	8	9	9	10
46 – 50	13	6	10	9
51 – 75	21	4	14	13
Total	100	100	100	100

Table 19: Age structure of mobile telephones users by the use of the Internet (December 2000, n=2049/June 2001, n = 529).

8 ATTITUDES TOWARDS MOBILE TELEPHONY

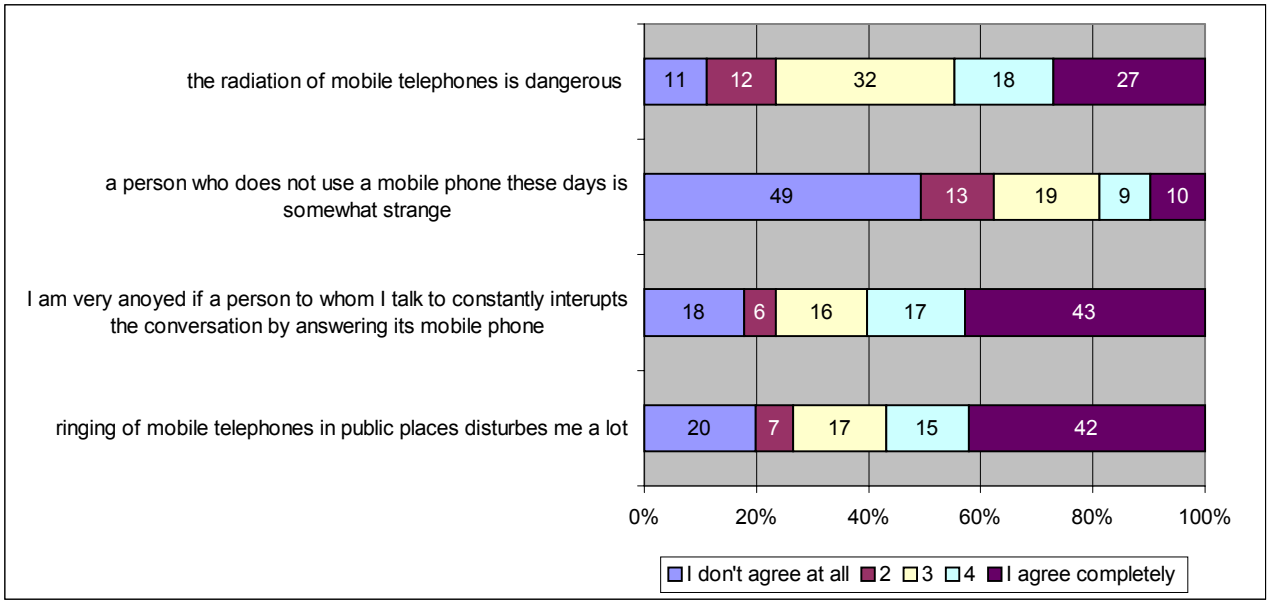
An the end of the survey we asked the respondents if they agree with some statements about mobile telephones. The graph bellow indicates the averages of answers to specific questions. It can be seen that mobile phone users are somewhat disturbed by ringing of mobile telephones in public places. They are also annoyed if a person to whom they talk constantly interrupts the conversation by answering his/hers mobile phone. The respondents mostly disagree with the opinion that a person who does not use a mobile phone is somehow strange.

The differences between averages are statistically significant. The estimates of these answers by socio-demographic characteristics are in appendix 9.7.



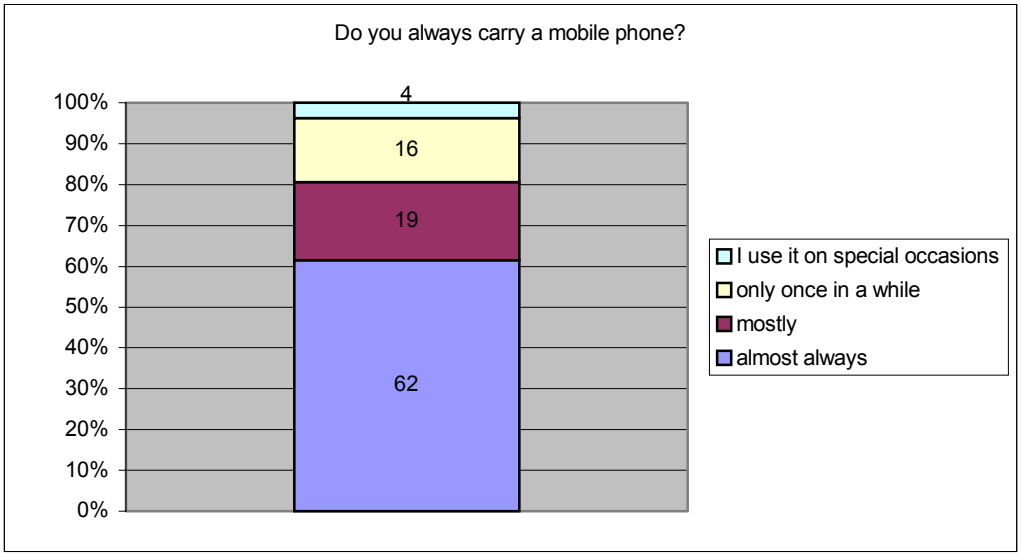
Graph 97: The averages of answers to specific statements about mobile telephones (June 2001).

More than 40% of respondents are very annoyed by the ringing of mobile phones in public places and also by the interruption of the conversation by answering the mobile phone. But almost a half did not agree with the statement, that a person who does not use a mobile phone these days is somewhat strange.



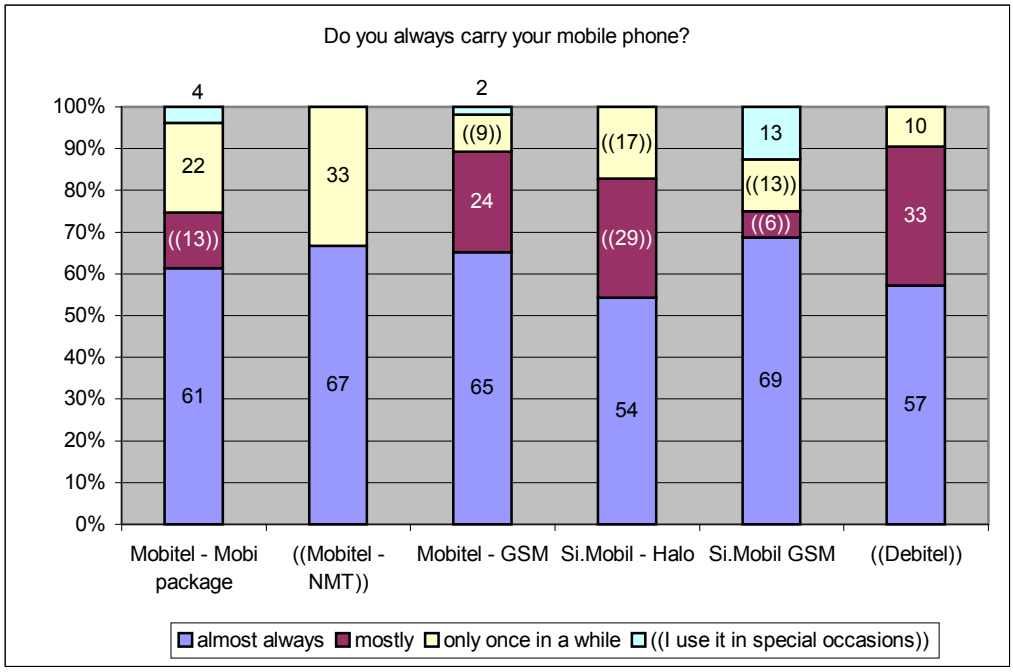
Graph 98: The averages of respondents' attitude towards mobile telephones (June 2001).

Almost two-thirds of mobile telephone users always have their mobile phone with them. Only 20% of users carry it only once in a while or on special occasions.



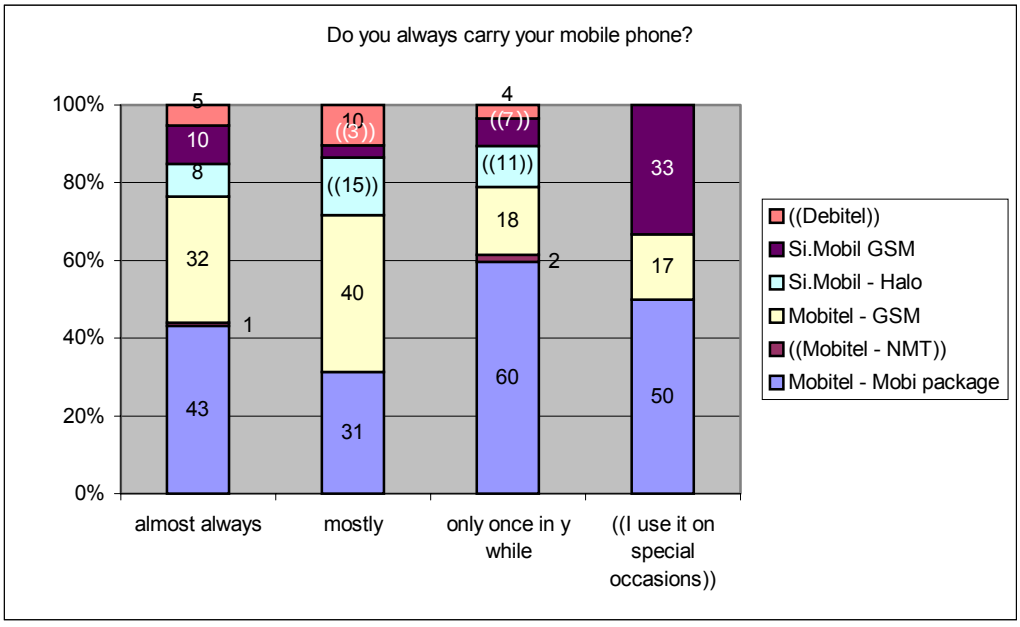
Graph 99: Mobile phones' use (June 2001, n=366).

The Mobi package subscribers have their mobile phones with them less often than subscribers of Mobitel – GSM package (the difference is statistically significant). There are no statistically significant differences among users of other packages, although the subscribers at Mobitel or at Si.Mobil have bigger shares of users that have almost always their phone with them.



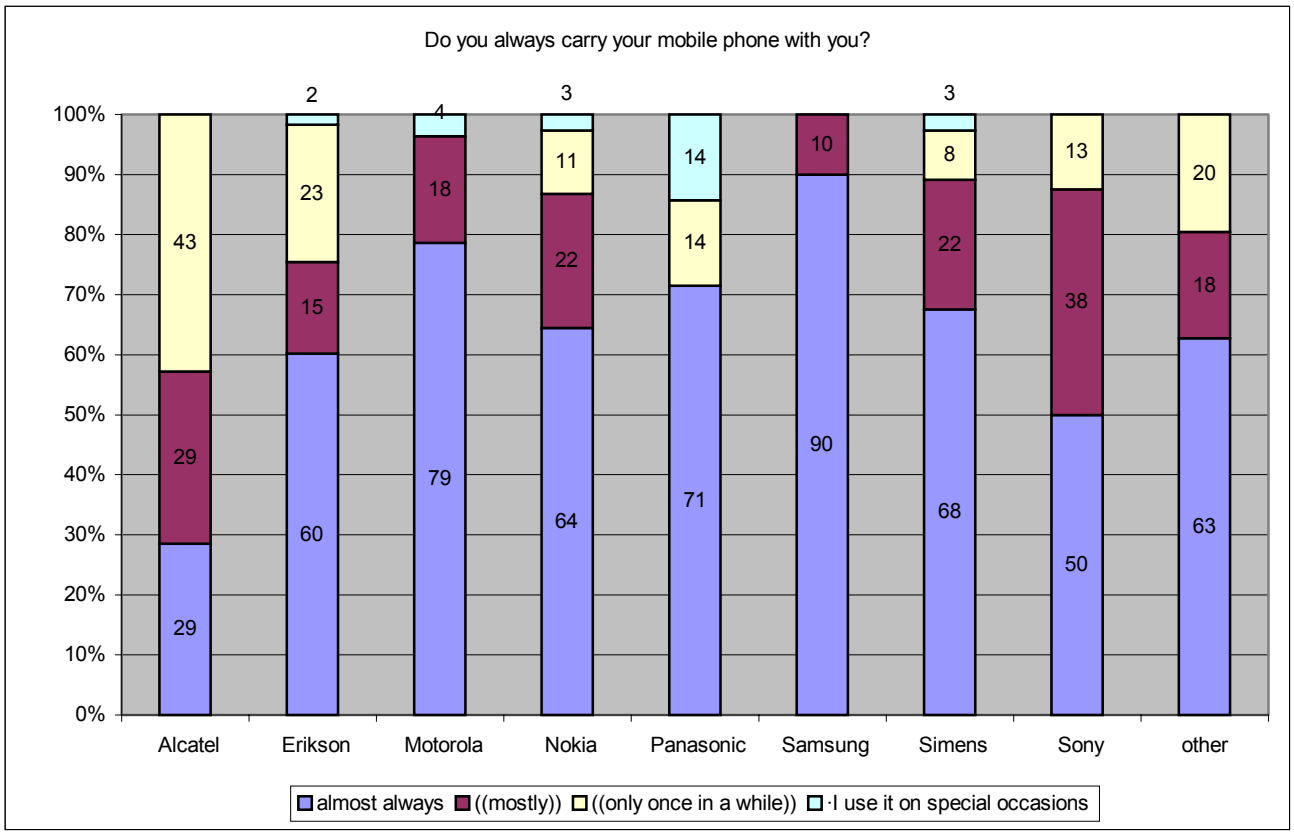
Graph 100: Use of mobile phones by the mobile operators' packages (June 2001).

There is a bigger share of Mobi package subscribers (than the one in the population) among users who carry their mobile phone only occasionally and a significantly smaller share of Mobi package subscribers among users who almost always have their mobile phone with them (the differences are statistically significant). Inversely proportioned to Mobi shares are the shares of Mobitel - GSM subscribers. With other categories the shares are the same as in population.



Graph 101: The mobile operators' packages by the frequency of mobile phone carrying (June 2001).

The following graph indicates the frequency of carrying of mobile phone by the mobile device brand. Samsung users have their mobile phone with them the most often; they are followed by the users of Ericsson. The differences between other shares are not statistically significant.



Graph 102: The frequency of carrying of mobile phone by the mobile device brand (June 2001)

9 SOCIO-DEMOGRAPHIC CHARACTERISTICS

9.1 Ownership

The groups that use mobile phones the most are higher status employees and students, while the groups that use mobile phones the least are housewives and those older than 56 years. Distribution by gender shows that men use mobile phone more often than women do as in the households with a mobile phone 79% of men and 61% of women use it.

Ownership of mobile phones	*Does your household own a mobile phone?*	*Do you use this mobile phone?*	*Uses its own mobile phone*	*Therefore you own at least one mobile phone and are its predominant user?*			
	yes (%)	*yes (%)*	**yes (%)*	*Owns one phone (%)*	*Owns two phones (%)*	*Owns three or more phones (%)*	*Uses the phones of others (%)*
GENDER:							
Male	88	90	79	89	3	3	4
Female	80	76	61	86	3		11
AGE:							
10-25 years	96	94	90	91	6		2
26-35 years	96	95	91	87	2	6	6
35-56 years	86	80	69	85	2	1	12
56 years and more	55	54	30	91	1		7
EMPLOYMENT:							
((Higher status employee))*	100	100	100	68	20	12	
Professional**	97	98	95	82	4	5	8
Clerk, public servant	97	85	83	86	3		11
Worker	90	89	79	90	2	1	7
((Farmer))	100	42	42	43			57
((Housewife))	65	45	29	71			29
Unemployed	83	61	50	100			
Pensioner	53	61	32	89	1		9
Primary school pupil	91	80	73	88	7		6
High school student	93	98	91	98			2
(Student)	100	98	98	95	3		2
EDUCATION:							
Unfinished primary school	74	60	44	91	4		5
Primary school	73	70	51	86			14
Professional school	83	88	73	92		2	5
High school	90	90	82	87	5	2	5
High professional school	96	91	87	80	6	6	8
University education, PhD.	95	97	92	84	7		10
Did not yet finish schooling.	90	92	83	93	5		2
ENGLISH KNOWLEDGE:							
I don't speak English.	66	55	36	88	1		11
I speak only little.	76	83	63	87	1		11
I speak it fairly well.	94	93	88	91	2	3	4
I speak it fluently.	97	96	93	85	6	2	6
COMPUTER MAGAZINES:							
Never	77	74	58	88	3	1	8
Rarely	93	90	84	89	1	3	7
Often	88	95	84	87	6	2	6

Table 20: The mobile phone ownership by socio-demographic characteristics of mobile telephones users (June 2001). The dark cells represent inaccurate estimates (()).

* Category »higher status employee« includes: manager, owner of a company, middle manager, leading worker.
** enterpreur, selfemployed professional

9.2 Mobile operators

The comments to the table 2 on the next page

In general women are more satisfied with their mobile operator (4,38) than men (4,09). They are also more satisfied with the mobile operators' services and users help. The majority of women (50%) and of men (40%) use Mobi package. The system of prepaid mobile connection is prevalent among primary school pupils, high school students and unemployed, but is less used by higher status employees. The latter are the most satisfied with their mobile operator, which in majority of cases is Mobitel. The majority of frequent readers of computer magazines are subscribers at Mobitel and are also less satisfied with services and users help of their operator (Table 21).

Ownership of mobile phones	*Who is your main mobile operator?*						*Satisfaction with mobile operator*			
							Average evaluation			
	Mobitel – Mobi	*Mobitel - NMT*	*Mobitel - GSM*	*Si.Mobil-Halo*	*Si.Mobil -GSM*	*Debitel*	*In total*	*Signal coverage*	*Signal quality*	*Service and users help*
GENDER:										
Male	40	1	34	8	11	6	4.09**	3.8	4.0	4.1**
Female	50		27	12	6	5	4.38**	4.0	4.1	4.3**
AGE:										
10-25 years	50		26	12	9	3	4.19	3.83	3.95	4.19
26-35 years	33	1	38	9	9	11	4.17	3.83	4.02	4.05
35-56 years	44	2	32	9	7	6	4.20	4.01	4.03	4.26
56 years and more	47		30	7	17		4.45	3.78	3.99	4.37
EMPLOYMENT:										
((higher status employee))[1*]	25		58			17	3.95	4.08	4.18	3.52*
Prfessional [2]	24	4	49	2	14	8	4.12	3.75	3.88	4.14
Clerk, public servant	35		29	8	17	10	4.19	3.91	4.00	4.39
Worker	45	1	24	13	8	9	4.25	3.91	4.01	4.07
((Farmer))			100				4.00	4.00	4.00	4.00
((Housewife))	17		83				4.51	4.02	3.99	4.67
Unemployed	90			10			4.52	4.52	3.86	4.79*
Pensioner	57		23	7	13		4.52*	3.86	4.15	4.55
Primary school pupil	58		12	27	4		4.33	3.80	4.11	4.17
High school student	62		21	12	3	3	4.19	4.03	4.01	4.36
(Student)	37		52	7	4		3.82*	3.63	3.82	4.01
EDUCATION:										
Unfinished primary school	54		13	25	8		4.43	3.55	4.02	4.39
Primary school	64		22	8	2	4	4.28	4.05	3.96	4.36
Professional school	46	1	23	14	12	4	4.24	3.92	4.01	4.10
High school	37	1	39	6	10	8	4.19	3.91	4.06	4.28
High professional school	25	4	42	8	8	13	3.88	3.51	3.91	3.75
University education, PhD	24		55	3	10	7	4.18	3.95	3.85	4.15
Did not yet finish schooling.	59		29	6	6		4.25	4.05	4.01	4.14
ENGLISH KNOWLEDGE:										
I don't speak English.	(55)		16	4	16	10	4.24	3.93	4.02	4.09
I speak only little.	49		27	13	9	2	4.37	3.88	3.90	4.26
I speak it fairly well.	44	2	27	12	7	8	4.19	3.91	4.02	4.19
I speak it fluently.	36		43	9	8	4	4.17	3.85	4.02	4.18
COMPUTER MAGAZINES:										
Never	52	1	23	9	9	7	4.33	4.01*	4.16	4.13*
Rarely	40	2	29	10	11	8	4.18	3.83*	3.87	4.33*
Often	35		47	10	6	1	4.09	3.78	3.91	4.09*

Table 21: Socio-demographic characteristics of mobile telephones users according to mobile devices ownership – shares (June 2001); ** difference is statistically significant at level p<.01, * difference is statistically significant at p<.05.

[1] Category »high status employee« includes: manager, owner of a company, middle manager, leading worker

[2] enterpreur, selfemployed professional

9.3 Mobile phones

In all the categories Ericsson holds the largest share of users, except among the higher status employees, where Nokia is prevailing. Nokia is following Ericsson also in other categories, while the third largest share has Siemens. Men use more Nokia devices, while women use more Ericsson and "other" brands.

Ownership of mobile phones	*Which company has produced your mobile phone? (%)*								
	Alcatel	Ericsson	Motorola	Nokia	Panasonic	Samsung	Siemens	Sony	Other
GENDER:									
Male	1	33	9	25	2	3	11	2	13
Female	3	37	7	19	1	1	10	2	19
AGE:									
10-25 years	3	33	6	26	3	3	12	2	12
26-35 years		33	10	20	3	5	10	3	16
35-56 years	1	35	9	21		1	12	3	19
56 years and more	9	52	9	17			4	4	4
EMPLOYMENT:									
((Higher status employee))*		33	17	50					
((Professional (entrepreneur, self-employed professional)))		22	12	31	2	6	6	2	18
((Clerk, public servant))	4	31	4	27		4	9	7	13
((Worker))		44	8	16	4	3	12		13
((Farmer))		100							
((Housewife))		33							67
((Unemployed))	25	25	25	25					
((Pensioner))	5	52	10	19			5		10
((Primary school pupil))	8	24		24			8		36
((High school student))		32	9	26		3	18	3	9
((Student))		29	11	18	7		18	7	11
EDUCATION:									
Unfinished primary school	11	32		16			5		37
Primary school		40	9	13		2	9	2	26
Professional school	2	35	10	(26)	3	3	10		11
High school	2	36	7	(23)	2	2	12	5	12
High professional school	4	32	4	32		8	8		12
University education, PhD	3	24	17	21	3	3	7	7	14
Did not yet finish schooling.		29	6	29			29		6
ENGLISH KNOWLEDGE:									
I don't speak English.	2	(48)	12	21			2		14
I speak only little.	2	(39)	11	20			9		20
I speak it fairly well.	2	36	6	(20)	2	5	9	2	(16)
I speak it fluently.	2	27	8	26	3	3	15	4	12
COMPUTER MAGAZINES:									
Never	4	45	8	(17)	1	2	6	2	(17)
Rarely	1	28	9	28	2	4	14	2	13
Often	1	(29)	8	(25)	3	3	13	3	15

Table 22: Sociodemographic characteristics of mobile telephones users by the mobile phones ownership (June 2001).

* Category »high status employee« includes: manager, owner of a company, middle manager, leading worker.

9.4 Mobile telephones and Internet

Almost all students and high school students (that is the age group from 10 to 25 years) use SMS messages. The persons that use SMS messages the least are those older than 56 years. Distribution by gender shows that women plan the WAP Internet access more often. In general the group that use WAP internet access via mobile phone or consider using it in the future the most are the students or high school students. The majority of mobile phone users who speak English fluently and those who often read computer magazines use or consider using WAP.

Mobile telephones and Internet (%)	*Do you use SMS messages?*		*Do you use WAP Internet access via mobile phone?➔*		*Have you consider that?➔*		*Do you plan to use WAP in the next six months? ➔*		*Would you change your current mobile operator for operator with better WAP service?*
	yes	no	yes	no	yes	no	yes	no	Average evaluation
GENDER:									
Male	78	22	8	92	24	76	22	78	2.41
Female	79	21	2	98	14	86	58	42	2.37
AGE:									
10-25 years	98	2	9	91	22	78	51	49	2.22
26-35 years	89	11	8	92	28	72	24	76	2.44
35-56 years	64	36	1	99	14	86	18	82	3.44
56 years and more	25	75		100	10	90	27	73	
EMPLOYMENT:									
((Higher status employee))*	77	23	8	92	39	61		100	•2.00
((Professional (entrepreneur, self-employed professional)))	85	15	5	95	33	67	26	74	•1.91
((Clerk, public servant))	80	20	2	98	14	86	21	79	•5.00
((Worker))	79	21	4	96	14	86	30	70	•1.0
((Farmer))		100		100		100			
((Housewife))	67	33		100		100			
((Unemployed))	82	18		100	12	88		100	
((Pensioner))	19	81	3	97	7	93		100	•5.00
((Primary school pupil))	91	9	4	96	40	60	49	51	•4.00
((High school student))	100		15	85	23	77	62	38	•2.56
((Student))	100		13	87	19	81	51	49	•2.00
EDUCATION:									
Unfinished primary school	(70)	30	4	96	27	73	49	51	•4.00
Primary school	71	29	6	94	9	91	44	56	•3.47
Professional school	73	27	5	95	17	83	36	64	•1.94
High school	84	16	6	94	15	85	28	72	•2.58
High professional school	83	17	4	96	36	64	9	91	•3.00
University education, PhD	(84)	16	7	93	38	62	24	76	•1.43
Did not yet finish schooling.	(94)	6	7	93	34	66	56	44	•1.00
ENGLISH KNOWLEDGE:									
I don't speak English.	39	61		100	5	95	58	42	
I speak only little.	66	34	2	98	9	91	29	71	•5.00*
I speak it fairly well.	82	18	4	96	18	82	29	71	•3.15*
I speak it fluently.	97	3	10	90	33	67	34	66	((1.80))*
COMPUTER MAGAZINES:									
Never	66	34	1	99	10	90	34	66	•2.29
Rarely	88	12	5	95	18	82	34	66	•2.35
Often	88	12	13	87	39	61	32	68	((2.45))

Table 23: Socio-demographic characteristics of mobile telephones users by Internet access via mobile phone (June2001). The dark cells represent inaccurate estimates (()). * means statistically significant difference at $p<0.05$.

* Category »high status employee« includes: manager, owner of a company, middle manager, leading worker.

9.5 Interest in SMS information service

In population, aged to 25 years there is little interest in receiving stock market information. Primary school pupils, more than high status employees, are interested in information on mobile operators' services. Pensioners are relatively strongly interested in receiving information on "special offer" products. Better-educated people are less interested in SMS information service in general, while more interest exists among younger population (with the exception of some domains).

Interest in receiving SMS information	*Bank information*	*Stock market information*	*Mobile operator's service information*	*Weather*	*Specific areas information*	*Information on "special offer" products*	*Other*
GENDER:							
Male	2,50	1,85	2,81	2,68	3,05*	2,23	1,92
Female	2,57	1,70	3,05	2,75	2,51*	2,40	2,10
AGE:							
10-25 years	2,41	1,65*	3,02	2,86	3,07	2,45	2,29
26-35 years	2,20	1,53	2,70	2,35	2,42	1,71	1,65
35-56 years	3,01	2,27	2,90	2,82	2,91	2,56	1,77
•56 years and more	2,72	2,36*	3,08	2,36	3,00	2,36	3,00
EMPLOYMENT:							
•Higher status employee [1*]	3,24	1,00	**1,66**	1,87	2,30	**1,00**	3,24
(Professional)[3]	2,65	1,90	**2,32**	2,13	2,44	**1,61**	2,65
(Clerk, public servant)	2,67	1,87	**2,82**	2,53	2,80	**2,29**	2,67
Worker	2,71	2,22	**3,12**	2,95	3,08	**2,57**	2,71
•Housewife	1,00	1,00	**5,00**	5,00	1,00	**1,00**	1,00
•Unemployed	3,00	1,00	**2,00**	1,00	1,00	**1,00**	3,00
•Pensioner	4,00	1,71	**5,00**	3,00	3,64	**4,29**	4,00
((Primary school pupil))	1,56	1,26	**3,50**	2,99	3,43	**2,51**	1,56
((High school student))	1,95	1,37	**3,14**	3,03	2,79	**2,96**	1,95
((Student))	2,70	1,78	**2,85**	2,91	3,37	**2,33**	2,70
EDUCATION:							
•Unfinished primary school	1,63	1,15*	3,51	2,92	3,54	2,70	1,55
(Primary school)	2,13	1,31*	3,65	3,48	2,86	2,86	2,68
Professional school	3,00	2,35*	3,43*	3,00	3,26	2,64	2,35
High school	2,44	1,77	2,52*	2,52	2,72	2,12	1,74
((High professional school))	2,70	1,83	2,37	2,06	2,52	1,73	1,72
((University education, PhD))	2,48	1,52	2,16	2,04	2,43	1,64	1,40
•Did not yet finish schooling.	2,22	1,25	2,22	2,57	1,84	1,92	2,04
ENGLISH KNOWLEDGE:							
•I don't speak English.	2,54	2,54	4,43	3,03	3,03	2,57	1,61
I speak only little.	2,68	2,01	2,81	2,51	2,87	3,17	1,74
I speak it fairly well.	2,35	1,73	2,94	2,92	2,79	2,32	2,11
I speak it fluently.	2,67	1,78	2,78	2,50	2,91	2,09	1,92
COMPUTER MAGAZINES:							
Never	2,09	1,84	2,92	2,83	**2,57**	2,21	2,11
Rarely	2,66	1,74	2,88	2,66	**2,72**	2,47	2,02
Often	2,80	1,83	2,91	2,64	**3,31**	2,15	1,81

Table 24: Socio-demographic characteristics according to the interest in receiving SMS information (June 2001, n=121). The dark cells marked with * indicate, that this category responded differently (the difference is statistically significant) than the one marked with *. The averages that are different in statistically significant way are accentuated (A-NOVA).

[1] Category »high status employee« includes: manager, owner of a company, middle manager, leading worker

[3] Enterpreur, selfemployed professional.

9.6 Buying intentions

Men intend more purchases of mobile phones than women do. Almost a third of primary school pupils intend to exchange their device and more than half of high school students intend to buy their first mobile phone.

Readiness to buy (%)	*Have you considered the purchase of a new or an additional phone for personal use (among users)?*				*The purchase of the first phone in household (among nonusers)*			*Do you plan your purchase in the next six months (both)?*	
	exchange	additional	exchange and additional phone	no	respondent personally	other members	no	yes	no
GENDER:									
Male	24	8		67	21	3	75	73	27
Female	18	3		78	14		86	53	47
AGE:									
10-25 years	34	8		58	33		67	66	34
26-35 years	14	9	1	76	38		62	81	19
35-56 years	17	3	1	80	25	4	71	60	40
56 years and more	15	4		81	9		91	48	52
EMPLOYMENT:									
High status employee*[*]	14			86				100	
Professional (entrepreneur, self-employed professional)	20	3	1	75	52		48	44	56
Clerk, public servant	20		2	78	48		52	57	43
Worker	20	10		70	27	7	66	68	32
Farmer				100					
Housewife				100	6		94	69	31
Unemployed	11			89	75		25		100
Pensioner	7			93	8		92	74	26
Primary school pupil	31	13		56			100	43	57
High school student	33	14		52	77		23	79	21
Student	42	3		55				96	4
EDUCATION:									
Unfinished primary school	28	9		(64)	28		72	47	53
Primary school	19	16		65	10		(90)	75	25
Professional school	(23)	4		74	4	4	(92)	51	49
High school	(21)	5	1	73	42		58	78	22
High professional school	14	7		79	46		54	46	54
University education, PhD	29	3		67			100	78	22
Did not yet finish schooling.	21			(79)			100	50	50
ENGLISH KNOWLEDGE:									
I don't speak English.	12	9		78	12		88	53	47
I speak only little.	23	5		73	21	5	(74)	59	41
I speak it fairly well.	(18)	6	1	75	14		86	(64)	(36)
I speak it fluently.	30	5		65	56		44	76	24
COMPUTER MAGAZINES									
Never	(16)	4		80	16	2	82	(54)	(46)
Rarely	(19)	9	1	71	25		75	(75)	(25)
Often	34	6	1	59	13		87	(70)	(30)

Table 25: Sociodemographic characteristics of mobile telephones users according to readiness to buy a mobile phone (June 2001). Grey columns mark inaccurate estimates (()).

[*] Category »high status employee« includes: manager, owner of a company, middle manager, leading worker.

The majority of households that intend to purchase their first mobile phone in the next six months do not yet know which operator would they choose. The least decided are housewives and age group from 26 to 35 years. The respondents aged from 10 to 25 years that intend to buy their first phone have mainly stated Mobitel's package as their choice. Mobitel's packages are the prevalent choice in purchase intentions, with an exception of age group 56 years and more, primary school pupils and pensioners. The table is merely illustrative due to small number of units in individual cells.

Readiness to buy (%)	*Do you know which mobile operator would you choose?*						
	Household with a mobile phone						*The purchase of the first mobile phone in household*
	Mobitel – Mobi	Mobitel - GSM	Si.Mobil-Halo	Si.Mobil-GSM	Debitel	I don't know	I don't know
GENDER:							
Male	16	40	9	4	8	24	100
Female	28	15	9	2	8	39	100
AGE:							
10-25 years	32	32	3	2	7	25	
26-35 years	4	37	10		13	36	100
35-56 years	17	34	6	9	6	29	100
56 years and more		20	48	6		26	
EMPLOYMENT:							
High status employee*[*]		45				55	
Professional (entrepreneur, self-employed professional)	26	13		7	25	28	
Clerk, public servant		39			29	32	
Worker	5	47	12	6	6	24	100
Housewife						100	
Pensioner	22		78				100
Primary school pupil	39					61	
High school student	35	38	8		5	14	
Student	32	33		6		29	
EDUCATION:							
Unfinished primary school	39					61	
Primary school	26	27	26		5	16	100
Professional school	8	56	14	11	10		100
High school	18	33	3	3	6	37	
High professional school	27	41				31	
University education, PhD	10	22		5	26	36	
Did not yet finish schooling.	37	35				28	
ENGLISH KNOWLEDGE:							
I don't speak English.	22	43				34	100
I speak only little.	30	35	31	4			100
I speak it fairly well.	21	24		6	18	32	
I speak it fluently.	16	36	11	2	4	31	
COMPUTER MAGAZINES:							
Never	23	17	21	2	18	19	100
Rarely	26	28	6		8	33	100
Often	12	47	2	7		31	100

Table 26: Sociodemographic characteristics of mobile telephones users according to readiness to buy a mobile phone (June 2001).

[*] Category »high status employee« includes: manager, owner of a company, middle manager, leading worker

A large share of population intends to buy Nokia and Ericsson mobile devices. The part of population that is still in the process of schooling also has a big share of those that would buy Siemens mobile devices. Man (39%) as well as women (21%) would mostly buy a Nokia mobile device.

Readiness to buy (%)	*Which company's mobile device are you most likely to buy?*									
	Alcatel	Ericsson	Motorola	Nokia	Panasonic	Samsung	Siemens	Sony	other	I don't know
GENDER:										
Male		16		39	2	2	8	4	2	27
Female	4	8	4	21			8		4	50
AGE:										
10-25 years	3	18	3	38	3		12		3	21
26-35 years		6		28		6	6	11	6	39
35-56 years		13		25			6			56
56 years and more		20		40						40
EMPLOYMENT:										
High status employee*[*]		50		50						
Professional (entrepreneur, self-employed professional)				20			20			
Clerk, public servant		17		33		17				
Worker		4		35			4	9	4	
Housewife										
Pensioner				75						
Primary school pupil		17								
High school student	7	20	7	20			27		7	7
Student		27		55	9					
EDUCATION:										
Unfinished primary school		17								83
Primary school	6	12	6	29			18		6	24
Professional school				58			8			33
High school		17		31	3	3	7	7	3	28
High professional school		33		33						33
University education, PhD		14		29			14			43
Did not yet finish schooling.				50						50
ENGLISH KNOWLEDGE:										
I don't speak English.		11		22			11			56
I speak only little.		10		40			10			40
I speak it fairly well.		13		30		4	9		9	35
I speak it fluently.	3	18	3	36	3		6	6		24
COMPUTER MAGAZINES:										
Never		13	4	35			4		4	39
Rarely	4	8		32			12	4		40
Often		18		32	4	4	11	4	4	25

Table 27: Sociodemographic characteristics of mobile telephones users by readiness to buy a mobile phone (June 2001).

[*] Category »high status employee« includes: manager, owner of a company, middle manager, leading worker

9.7 Attitudes

Younger (10 to 25 years old) agree less with the statement that a person who does not use a mobile phone these days may be somewhat strange.The differences are evident also in the case of other statements. Better-educated people are more annoyed by the interruptions of conversation by answering the mobile phone, but feel there is less danger in radiation of mobile phones than other categories do.

Opinions (averages)	*Do you agree with the following statements about mobile telephones?*			
	The ringing of mobile phones in public places disturbs me a lot.	The interruption of conversation by answering the mobile phone.	A person who does not use a mobile phone these days is somewhat strange.	The radiation of mobile phones is dangerous.
GENDER:				
Male	3.44	3.64	2.20	3.28
Female	3.62	3.59	2.14	3.48
AGE:				
10-25 years	3.39	3.73	1.86*	3.25
26-35 years	3.74	3.75	2.06	3.26
35-56 years	3.66	3.67	2.33*	3.39
56 years and more	3.29	3.26	2.46*	3.72
EMPLOYMENT:				
High status employee	4.07	4.11	**1.54**	**2.32**
Professional	4.19*	4.15*	**1.92**	**3.25**
Clerk, public servant	3.60	4.02*	**2.02**	**3.25**
Worker	3.78	3.68	**2.34**	**3.43**
Farmer	2.67	3.12	**1.88**	**3.39**
Housewife	2.95	3.12	**2.31**	**4.07**
Unemployed	2.77	2.89	**2.04**	**2.95**
Pensioner	3.27*	3.21*	**2.52**	**3.72**
Primary school pupil	2.98*	3.25	**2.08**	**3.40**
High school student	3.36	3.62	**1.88**	**3.21**
Student	3.71	4.12*	**1.75**	**3.16**
EDUCATION:				
Unfinished primary school	3.18	**2.85**	**1.90**	**3.66**
Primary school	3.20	**3.35**	**2.73**	**3.49**
Professional school	3.64	**3.79**	**2.24**	**3.41**
High school	3.71	**3.71**	**1.98**	**3.30**
High professional school	3.95	**4.21**	**1.87**	**3.41**
University education, PhD	4.01	**4.21**	**1.80**	**2.90**
Did not yet finish schooling.	2.96	**3.51**	**2.08**	**3.17**
ENGLISH KNOWLEDGE:				
I don't speak English.	3.28	3.18*	2.50*	3.61
I speak only little.	3.44	3.65	2.39	3.44
I speak it fairly well.	3.67	3.72*	1.93*	3.26
I speak it fluently.	3.71	3.94*	1.96*	3.26
COMPUTER MAGAZINES:				
Never	3.38*	3.41*	2.24	3.50*
Rarely	3.78*	3.78	2.17	3.41
Often	3.58	3.88*	2.02	3.08*

Table 28: Sociodemographic characteristics of mobile telephones users by opinions about mobile telephones (June 2001). The dark cells marked with * indicate that this category responded differently (the difference is statistically significant) than the one marked with *. The averages that are different in statistically significant way are accentuated (A-NOVA).

9.8 The frequency of calling

The table bellow indicates the frequency of calling by sociodemographic characteristics. Thus, it is seen that men make more calls than women do. Younger people (up to 35 years of age) also make significantly more calls than those aged 35 and more. The high status employees, high school students and university students also make more calls per day than for example housewives. More calls are made by better educated, by those who are fluent in English and by those who often read computer magazines.

	How many calls using a mobile phone do you make on a typical workday?							
	((I only call once in a while.))	1-4	7-9	10-19	((20-49))	•50-100	•more than 100	**averages**
GENDER:								
Male	6	38	23	21	11	1		10.30
Female	11	51	22	14	1			5.32
AGE:								
10-25 years	2	37	25	32	4	1		9.12
26-35 years	8	44	22	15	8	1	1	9.25
35-56 years	11	43	25	12	9			7.67
56 years and more	20	66	8	4	2			3.63
EMPLOYMENT:								
High status employee		21	21	19	30	8		21.38
Professional	6	36	21	19	16		1	12.17
Clerk, public servant	11	39	27	16	8			7.82
Worker	6	53	22	15	3			6.25
Farmer	57			43				6.59
Housewife	29	60	11					2.41
Unemployed		36	32	32				7.77
Pensioner	30	61	2	5	2			3.23
Primary school pupil	5	54	26	11	5			6.34
High school student		23	33	40	4			10.13
Student	2	29	34	32		3		10.06
EDUCATION:								
Unfinished primary school	16	53	22	8				4.19
Primary school	14	56	12	16	2			5.50
Professional school	8	42	22	21	7			7.99
High school	5	40	28	19	7	1		8.80
High professional school	5	48	25	7	15			9.11
University education, PhD	7	36	19	23	9	3	2	13.43
Did not yet finish schooling.	7	27	30	29	7			9.32
ENGLISH KNOWLEDGE:								
I don't speak English.	27	54	10	5	4			4.25
I speak only little.	8	59	20	13				4.77
I speak it fairly well.	3	41	26	21	8			8.84
I speak it fluently.	5	34	26	24	9	1	1	10.80
COMPUTER MAGAZINES:								
Never	14	52	17	14	3			5.65
Rarely	6	40	24	24	6		1	8.77
Often	3	33	31	18	13	2		11.54

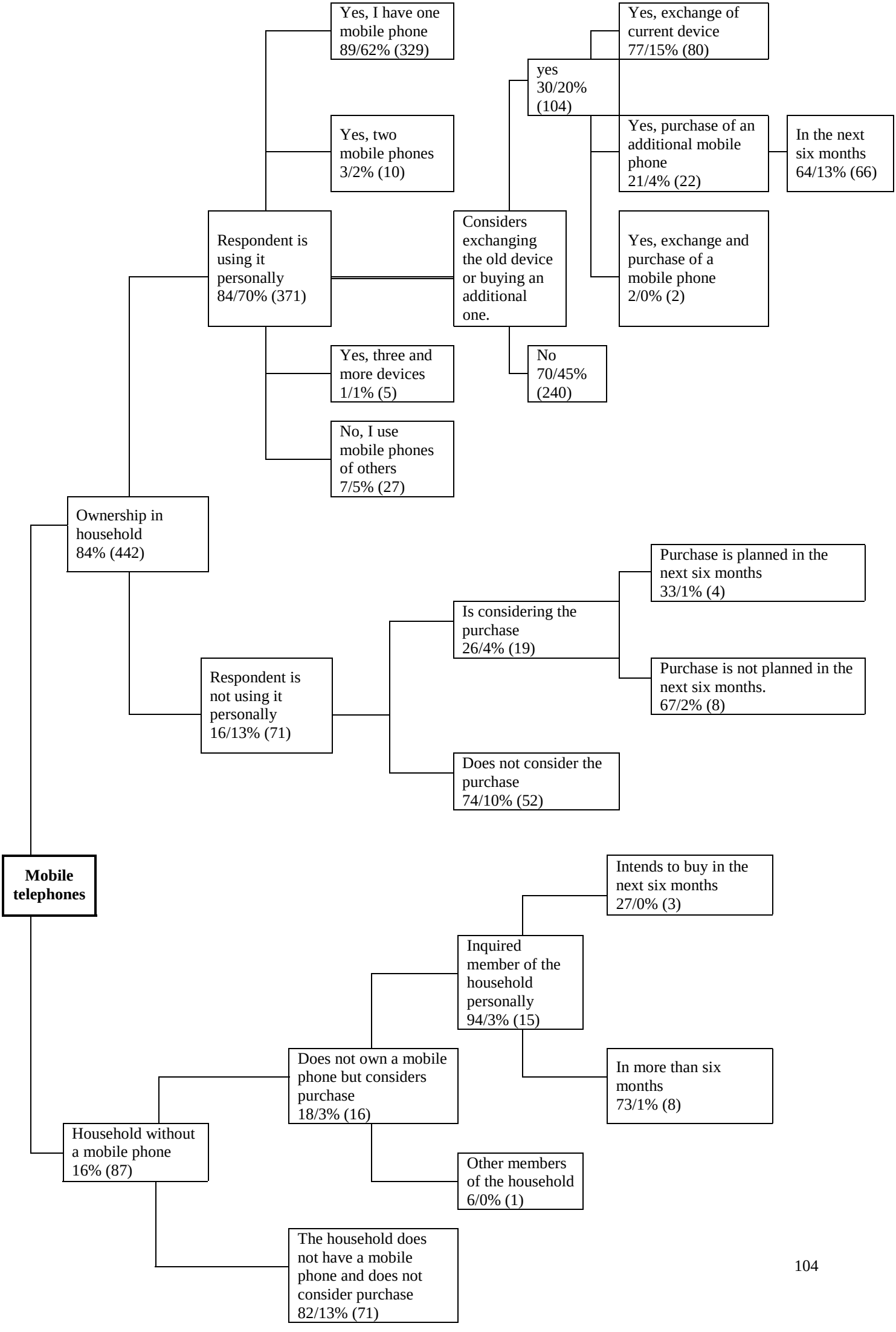
Table 29: Sociodemographic characteristics of mobile telephones users by frequency of calling (June 2001).

The users of mobile telephones almost always carry their mobile phone with them. An exception are only older than 56 years, housewives and farmers. Only a small share of mobile phone users uses a mobile phone only on special occasions.

	Do you always carry your mobile phone with you?			
	almost always	*mostly*	*only once in a while*	*((I use it on special occasions.))*
GENDER:				
Male	59	21	15	4
Female	65	16	16	3
AGE:				
10-25 years	68	16	13	3
26-35 years	70	16	13	
35-56 years	56	24	15	5
((56 years and more))	31	20	38	11
EMPLOYMENT:				
((High status employee))	59	28	12	
Professional	59	22	17	3
Clerk, public servant	63	18	17	2
Worker	68	15	13	3
•Farmer		100		
•Housewife	34	66		
•Unemployed	50	21	29	
((Pensioner))	35	18	31	17
((Primary school pupil))	50	24	23	3
High school student	82	•8	•10	
((Student))	69	18	7	6
EDUCATION:				
((Unfinished primary school))	40	30	14	17
Primary school	68	11	22	
Professional school	61	22	14	3
High school	63	18	16	3
((High professional school))	51	17	25	6
University education, PhD	69	((19))	((10))	2
((Did not yet finish schooling.))	67	20	8	5
ENGLISH KNOWLEDGE:				
(I don't speak English.)	55	10	25	10
(I speak only little.)	51	31	16	2
I speak it fairly well.	58	20	19	3
I speak it fluently.	72	16	((8))	3
COMPUTER MAGAZINES:				
Never	55	18	21	6
Rarely	68	((20))	((11))	1
Often	64	((19))	((13))	4

Table 30: Sociodemographic characteristics of mobile telephones users by carrying of mobile devices (June 2001).

Next page: **Scheme 2:** Categories of mobile telephones users in Slovenia (June 2001); the exact number.


Mobile telephones
Ownership in household 84% (442)
Household without a mobile phone 16% (87)
Respondent is using it personally 84/70% (371)
Respondent is not using it personally 16/13% (71)
Yes, I have one mobile phone 89/62% (329)
Yes, two mobile phones 3/2% (10)
Yes, three and more devices 1/1% (5)
No, I use mobile phones of others 7/5% (27)
Considers exchanging the old device or buying an additional one.
yes 30/20% (104)
No 70/45% (240)
Yes, exchange of current device 77/15% (80)
Yes, purchase of an additional mobile phone 21/4% (22)
In the next six months 64/13% (66)
Yes, exchange and purchase of a mobile phone 2/0% (2)
Is considering the purchase 26/4% (19)
Does not consider the purchase 74/10% (52)
Purchase is planned in the next six months 33/1% (4)
Purchase is not planned in the next six months. 67/2% (8)
Does not own a mobile phone but considers purchase 18/3% (16)
The household does not have a mobile phone and does not consider purchase 82/13% (71)
Inquired member of the household personally 94/3% (15)
Other members of the household 6/0% (1)
Intends to buy in the next six months 27/0% (3)
In more than six months 73/1% (8)

Graph index

Table index