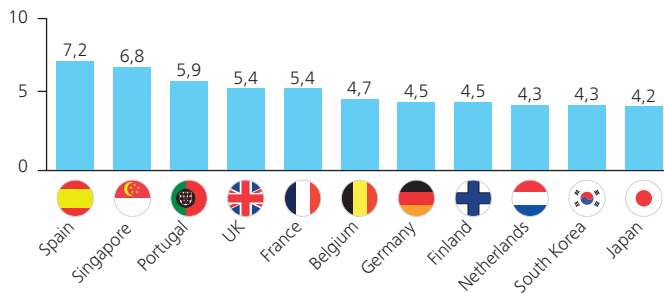
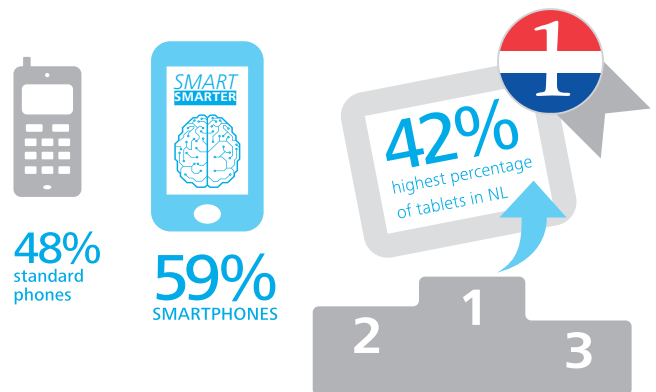


Executive summary

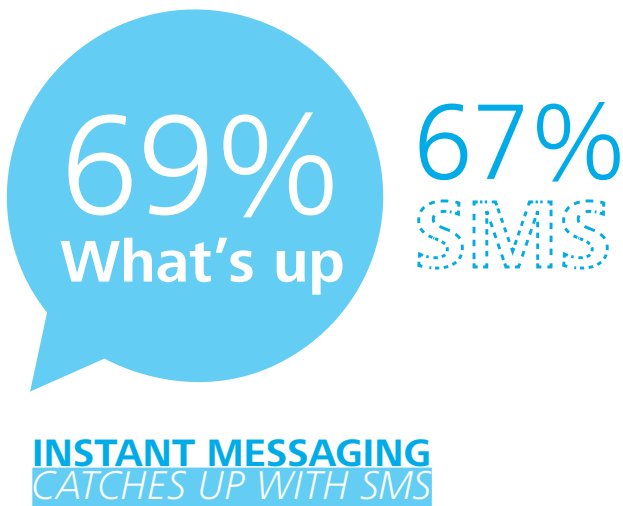
On the go is on the grow - The Dutch own 4.3 mobile devices per head



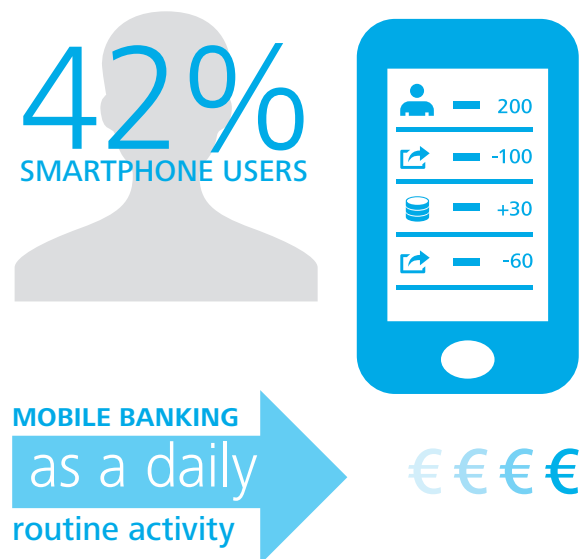
.. even as devices continue to get smarter



Instant messaging catches up with SMS



Mobile banking as a daily routine



75% of smartphone users in the Netherlands use Wi-Fi to connect



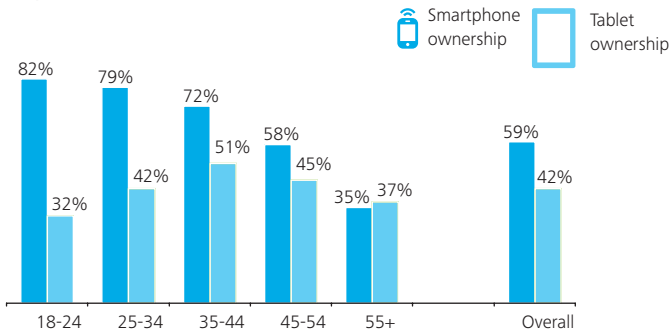
75% use Wi-Fi to connect

Wi-Fi is popular because consumers see it as cheaper, faster & more efficient



ESCAPING **bill shock** through **WiFi** which is **CHEAPER** and **FASTER** & **MORE EFFICIENT**

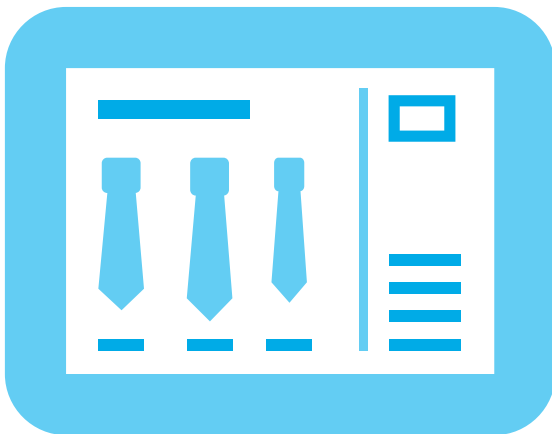
In the Netherlands, the older generation steals a march on tablets
 Respondents that own / have access to device



Smartphone tops the shopping list, early interest in "wearable computing"



Retail browsing on tablets drives eCommerce

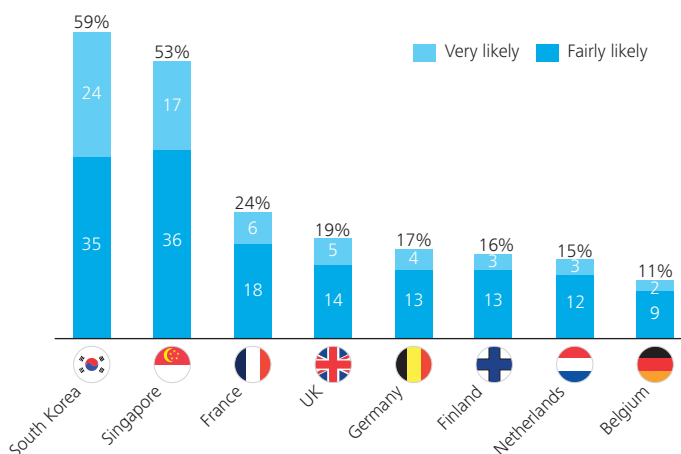


14% of Tablet users have used their tablets to stream video in the past week...



4G adoption is expected to grow...

Respondents likely to subscribe to LTE in the next 12 months (developed countries where LTE is commercially available)



...while key barriers need to be overcome

Main reasons not to subscribe to 4G

