

Deloitte Global Mobile Consumer Survey 2014 The Pulse of the Mobile Nation (The Dutch Perspective)

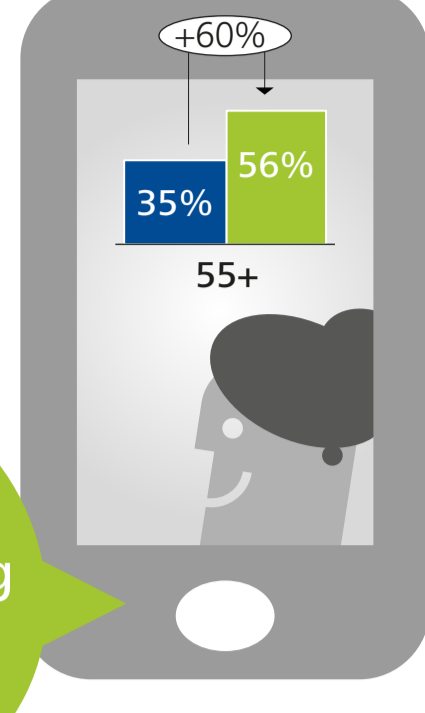
DEVICES



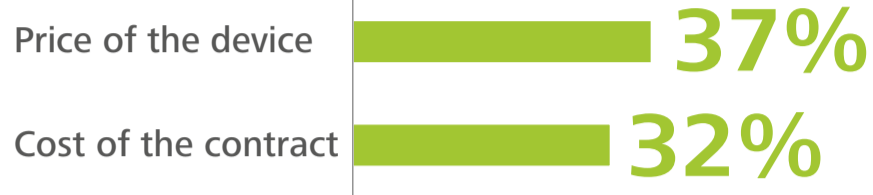
Smartphone remains popular

71%
of all respondents have a smartphone

Older consumers are rapidly catching up with smartphone ownership

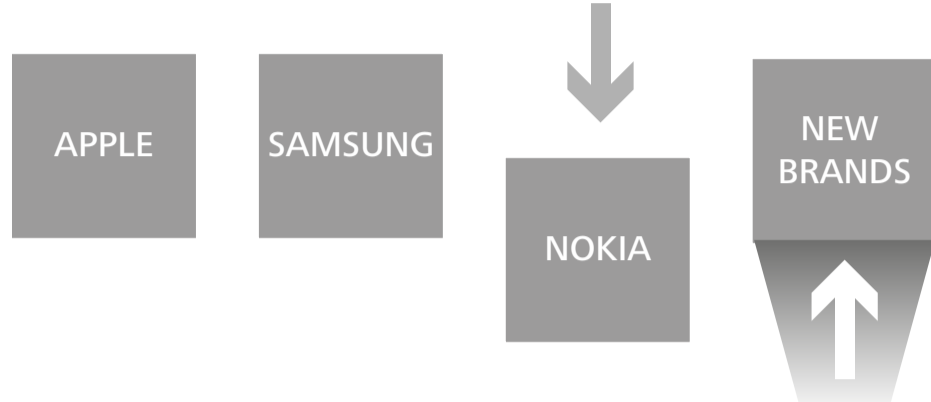


CONSUMERS HAVE BECOME MORE PRICE SENSITIVE, RANKING THESE ATTRIBUTES HIGHEST WHEN CHOOSING A NEW PHONE



"Weighted Base: All adults 18-75 who have a phone or smartphone (n=1846)"

NEW "CHALLENGER" BRANDS ARE GAINING SLICES OF MARKET SHARE



CONSUMERS STILL SEE THEIR OPERATOR AS THE PLACE TO BUY A NEW PHONE, BOTH ONLINE AND IN-STORE



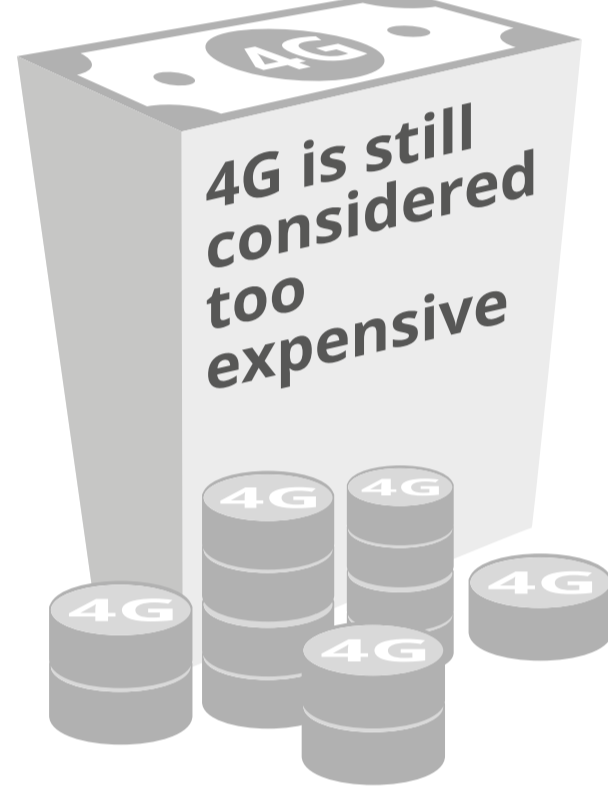
Weighted Base: All adults 18-75 who have a phone or smartphone (n=1846)

CONNECTIVITY



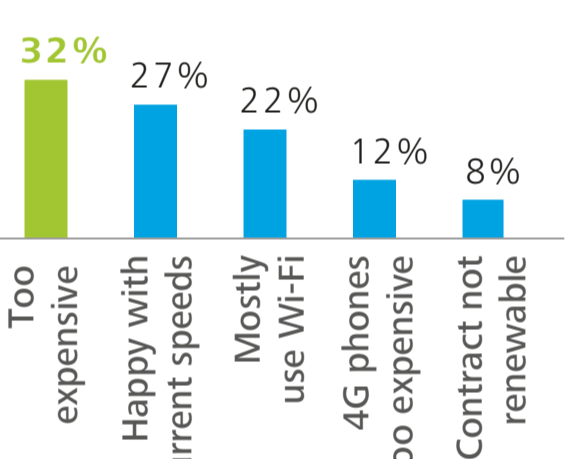
88%
... connect their phone to the Internet via Wi-Fi at home, work, or their place of study

12% of phone owners have a 4G subscription

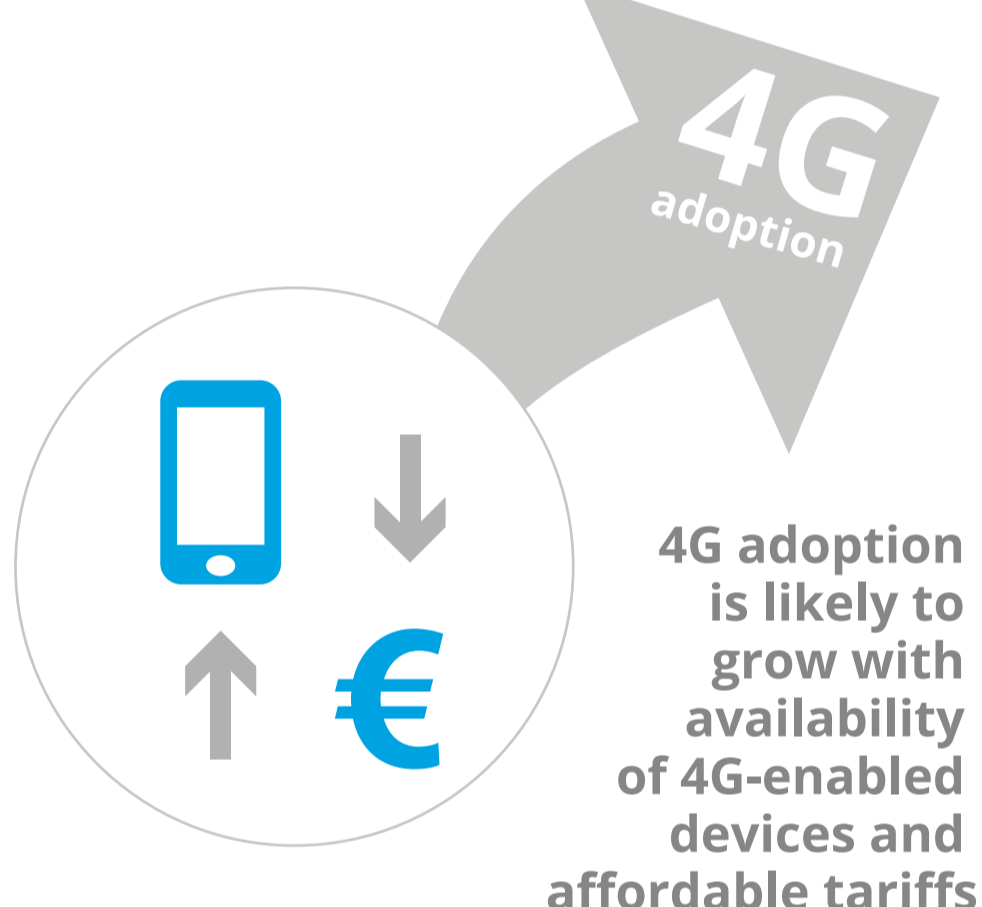


4G is considered faster than Wi-Fi at home, at work, when out and about, and when commuting

REASON FOR NOT TAKING OUT A 4G SUBSCRIPTION



Weighted base: All adults 18-75 who do not have a 4G/LTE subscription (n:1618)



SIM only has doubled

SIM-only as a contract type has doubled in market share compared to 2013

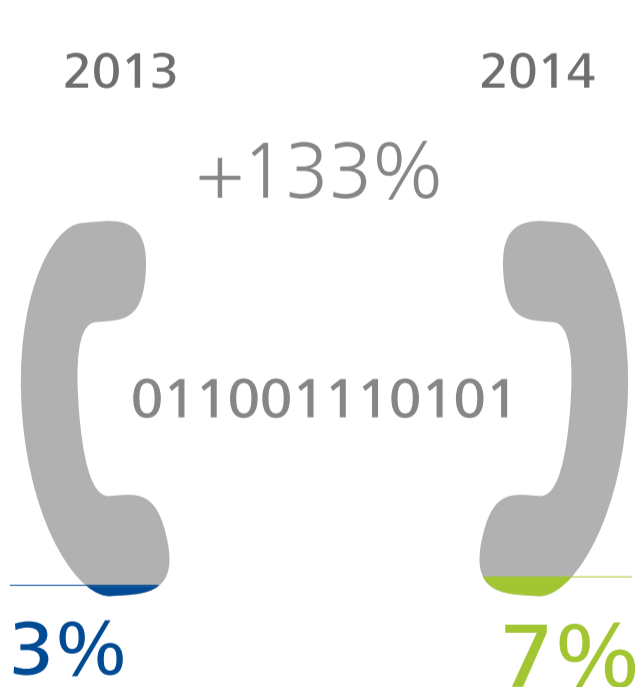


Cost concerns are valid: the **#1** reason for 'bill shock' in 2014 is consumers exceeding their data allowance

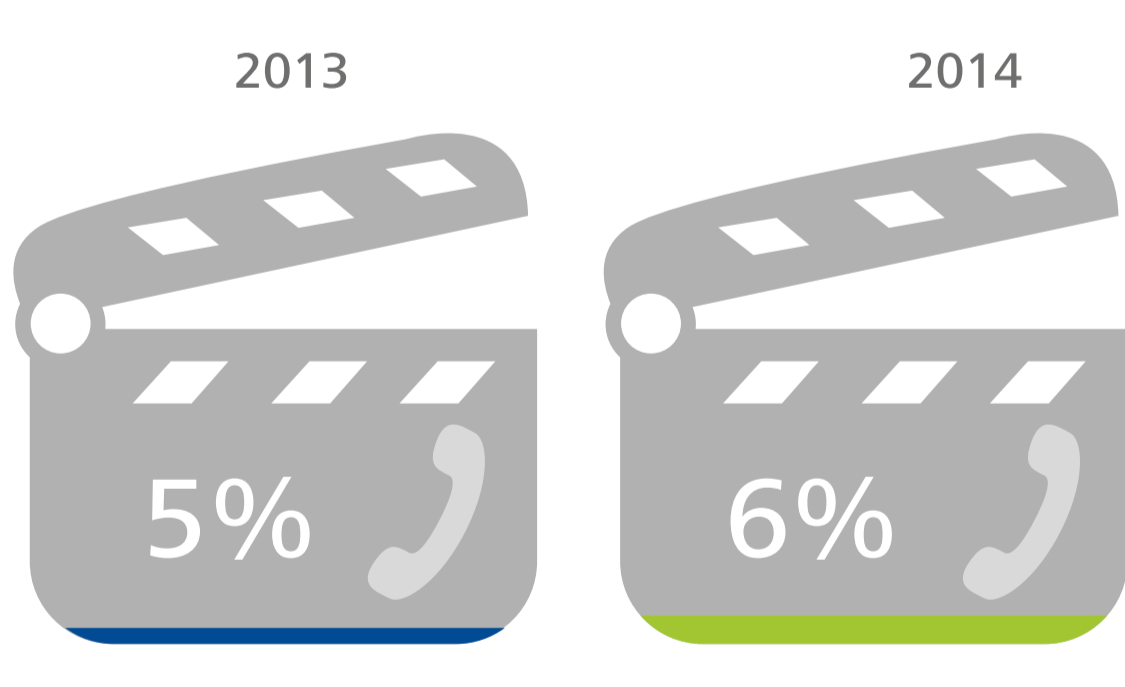


USAGE

Slow start in adopting advanced Over-The-Top services such as TV, video calling or Mobile VoIP



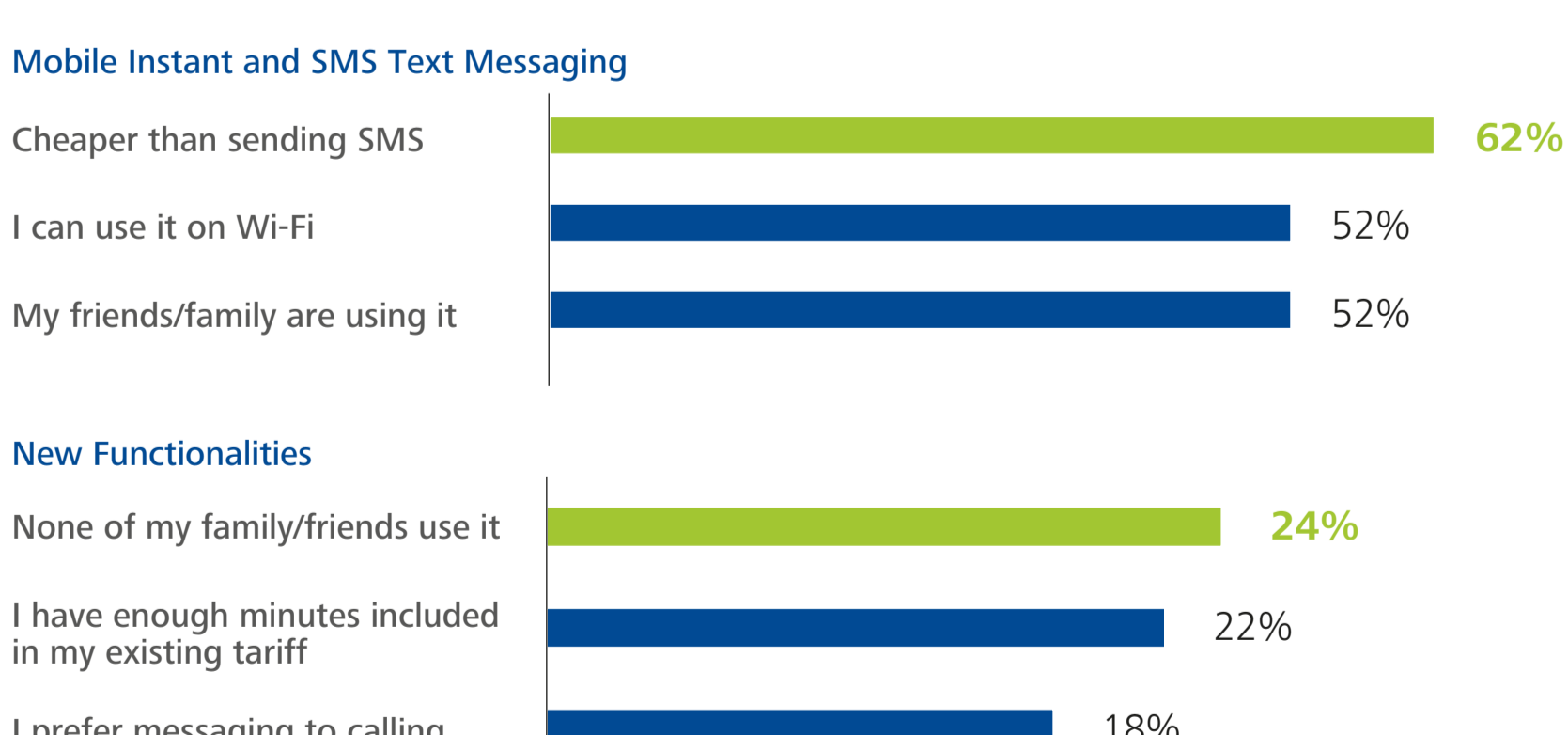
VOIP



Video Call

source: Deloitte Global Mobile Consumer Survey, NL Edition, July 2014

Consumers only start using new functionalities such as VoIP if friends or family use them and if it allows them to save money



Banks remain the most trusted institutions for any type of mobile transaction

