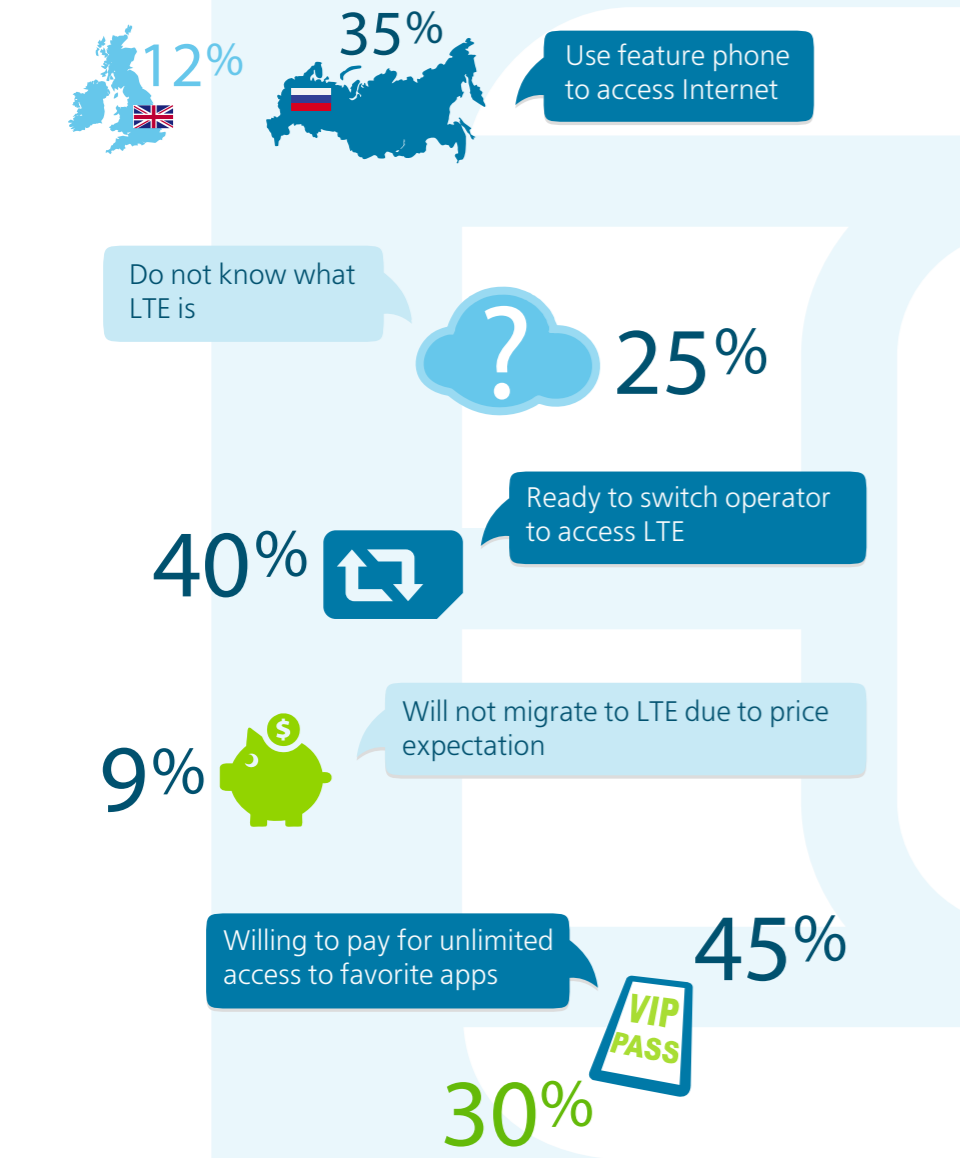
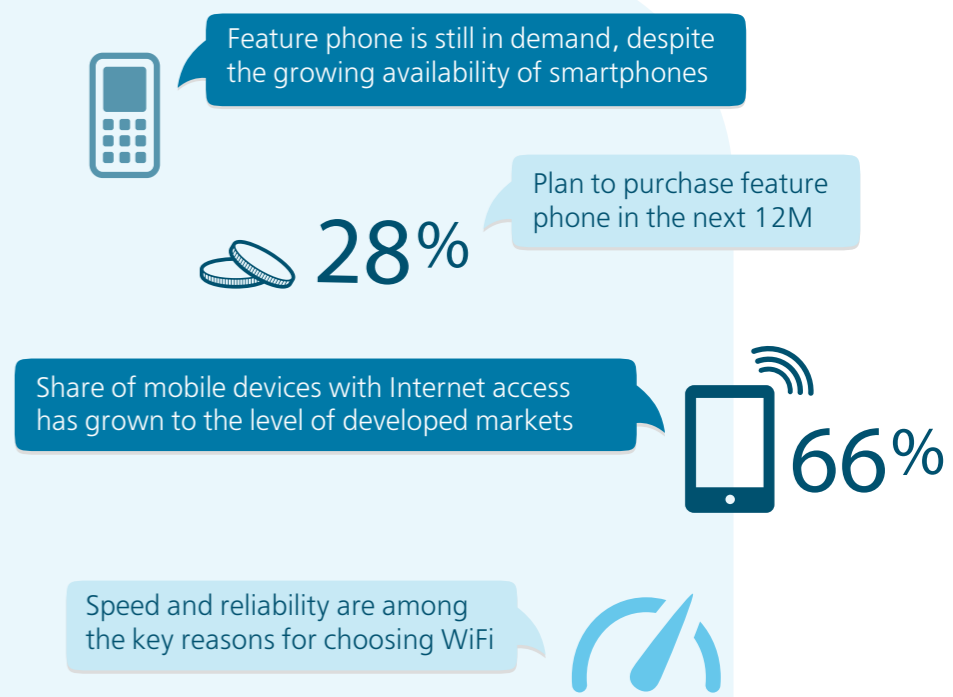
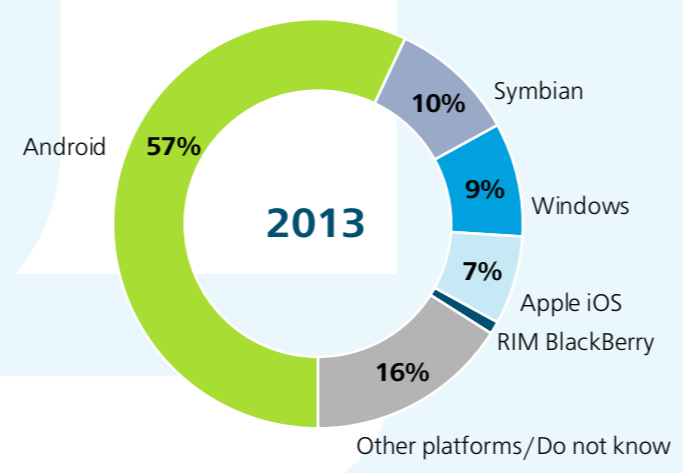


Penetration	76% 74%	29% 47%	14% 25%
Go online	34% 35%	67% 81%	71% 78%
Use mobile Internet	62% 62%	71% 59%	36% 33%
Use WiFi	27% 41%	61% 75%	71% 84%
Will buy device in next 12M	19% 28%	24% 42%	28% 34%
Average relative revenue per user	x1,0	x1,4	x1,5
Market share of challenger brands	8% 13% (Average)		32% 39%

■ 2012 ■ 2013

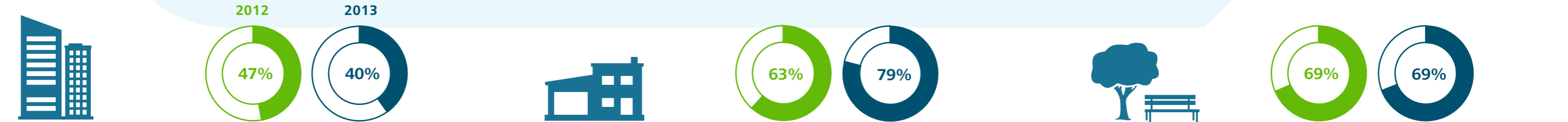


Android leads among smartphone users



WiFi Usage: WiFi usage in Russia has caught up with developed markets

Work Home Out and about



Source: 20-country online survey of mobile phone users around the world. Fieldwork took place between May to July 2013, with 38,650 responses included in the final study. The samples Belgium, Finland, France, Germany, Japan, Netherlands, Portugal, Singapore, South Korea, Spain, United Kingdom, United States are nationally representative. All samples in these countries were 2,000 except Finland (1,000), Portugal (600), UK (4,020). In Argentina, Brazil, China, India, Indonesia, Mexico, Russia, Turkey, the online research approach used results in a high concentration of urban professionals. These are likely to be relatively high earners within their country. All samples in these countries were 2,000 except Turkey (1,000). The questions for this survey were written by Deloitte member firms. The multinational online research program was managed by Ipsos MORI.