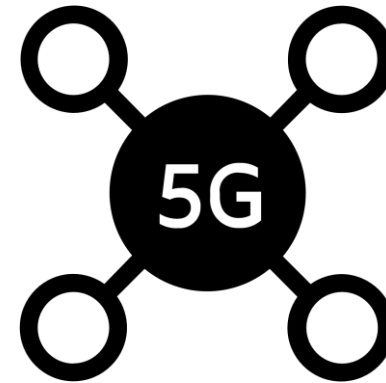


# 5G consumer potential amidst COVID-19

The crisis impact on Belgian consumers' readiness to spend on digital services and migrate to 5G



# The first year of 5G in numbers



**2.6x**

higher data usage on average compared to 4G users in South Korea

**150 million**

5G subscribers in China at the end of July 2020

**290 million**

5G subscribers forecasted in Western Europe by the end of 2025

**8.65 million**

5G subscribers in South Korea by the end of Aug 2020

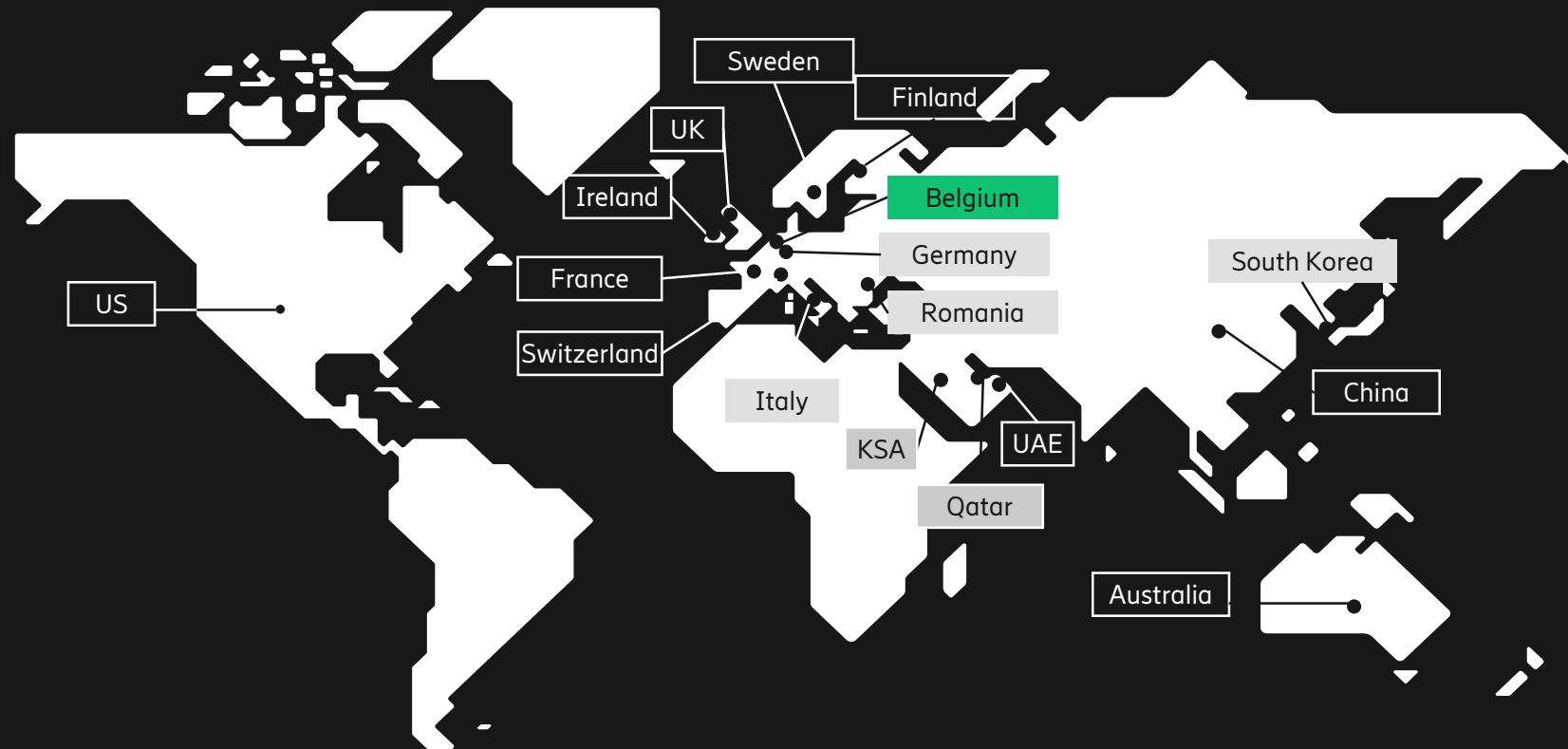
Close to 32% of South Korea's total mobile data traffic on 5G in July generated by 11.3% subs.

**3.9%- 1.9%**

YoY wireless revenue increase for SKT and KT due to 5G despite Coronavirus

# Representing opinions of 5.6 million Belgian consumers

Smartphone users aged 15–69 years old using the internet were the target group.



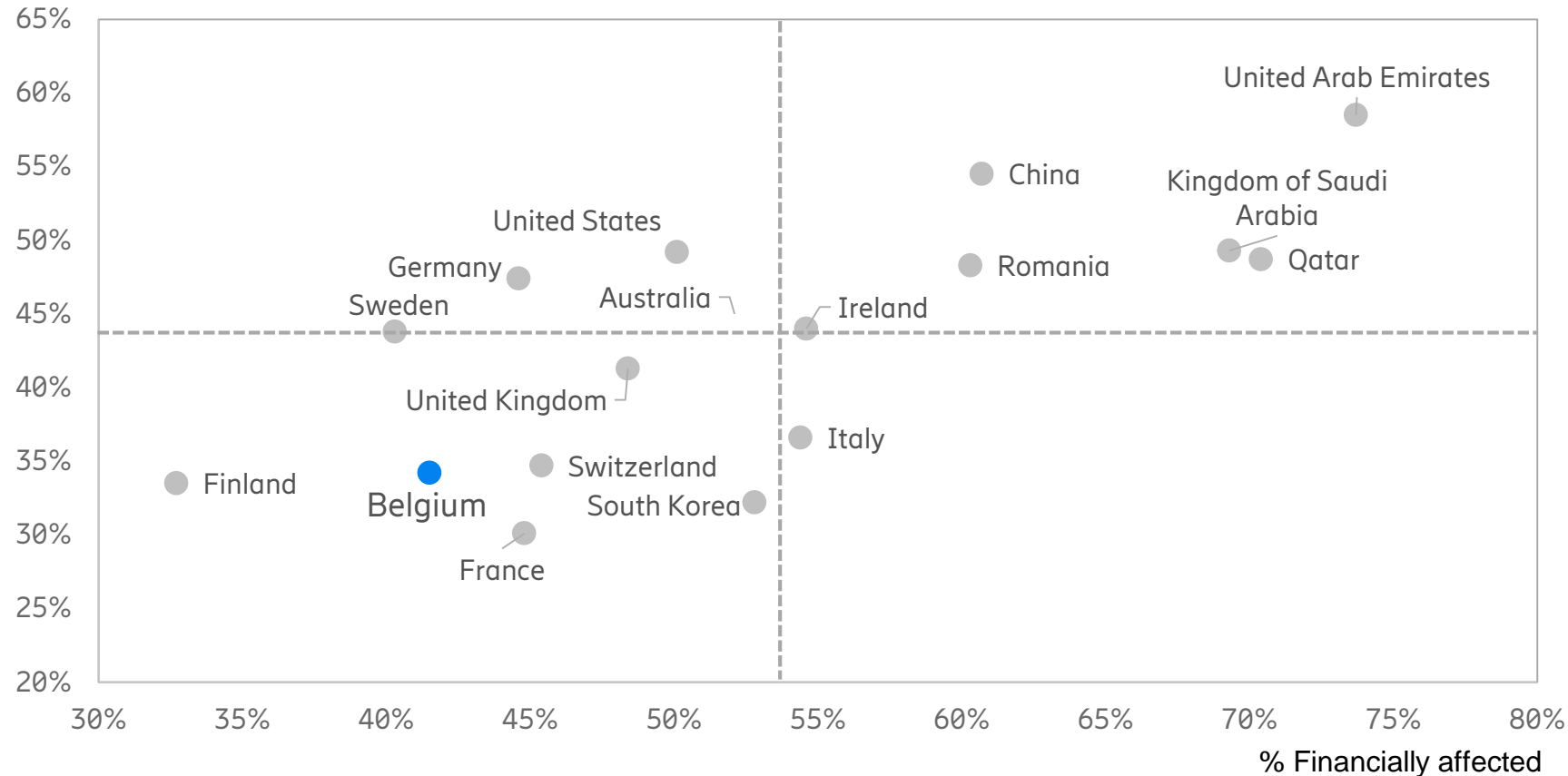
1000  
smartphone  
users

were interviewed in  
Belgium in July 2020

# Pandemic has had an economic impact, but consumers are optimistic of a recovery



% Expect on HH income improve



**42%**  
Belgium consumers in our survey say their household income has been impacted by crisis but

**34%**  
expect this situation to improve in next 12 months.

# 5G consumer readiness in Belgium



Consumers expect resilient connectivity



25%

Plan to increase expenditure on mobile broadband connectivity over the next 12 months

Awareness of 5G



18%

Increase in users who are now familiar with 5G over the past year

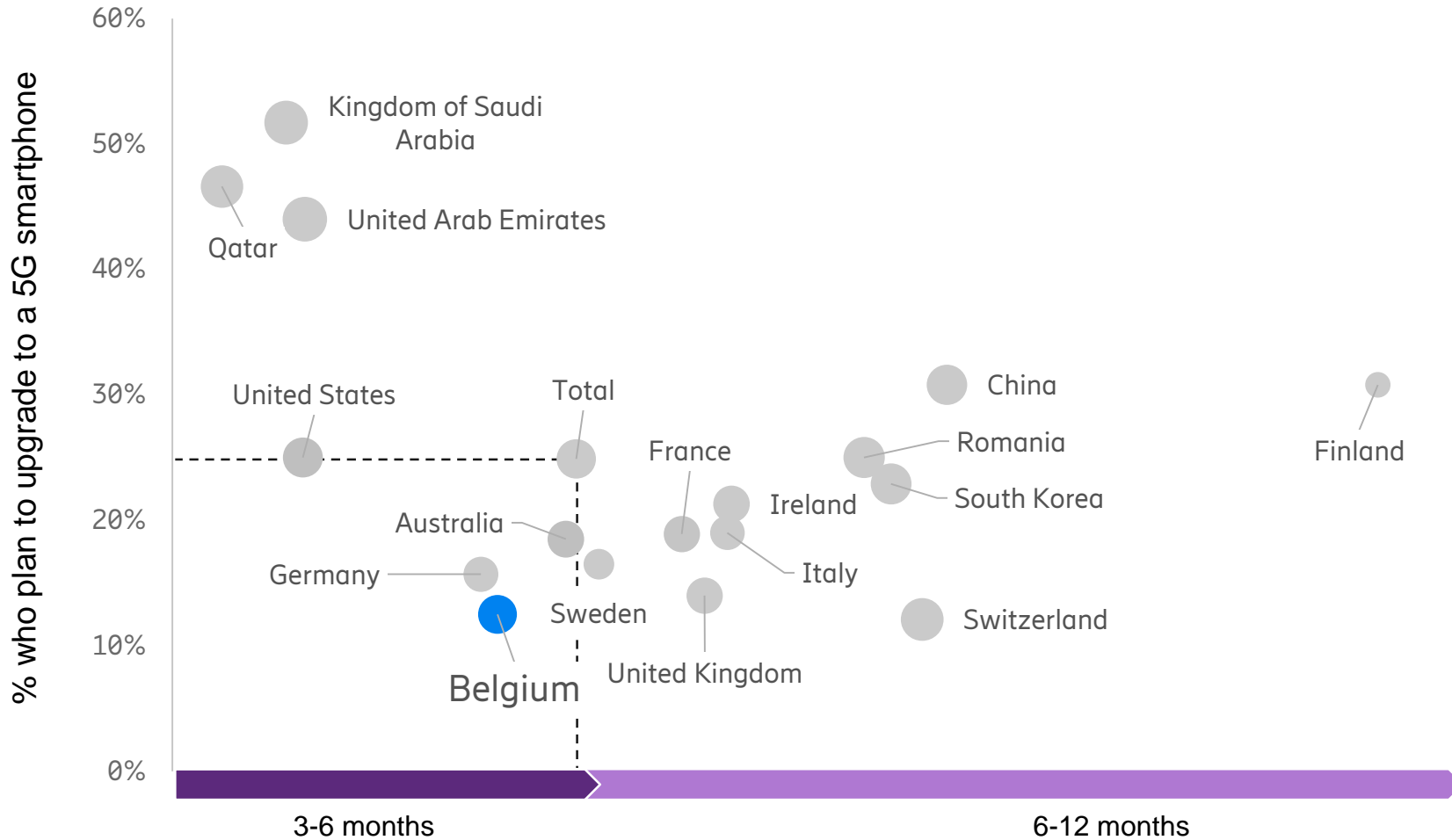
Impact of pandemic on 5G premium



1 in 4

Still willing to pay a 15% premium for 5G despite some of the premium being eroded due to Covid19

# Half a million consumers could take up 5G in Belgium post 5G commercial launch



**13%**  
Belgian smartphone users expect to upgrade to 5G smartphone post a commercial 5G launch

**30%**  
of those looking to upgrade are already existing iPhone users

Base: Smartphone users aged 15-69, Belgium  
Source: Ericsson Consumer & IndustryLab, 5G consumer readiness post COVID19, October 2020

# Truth behind 5G misinformation



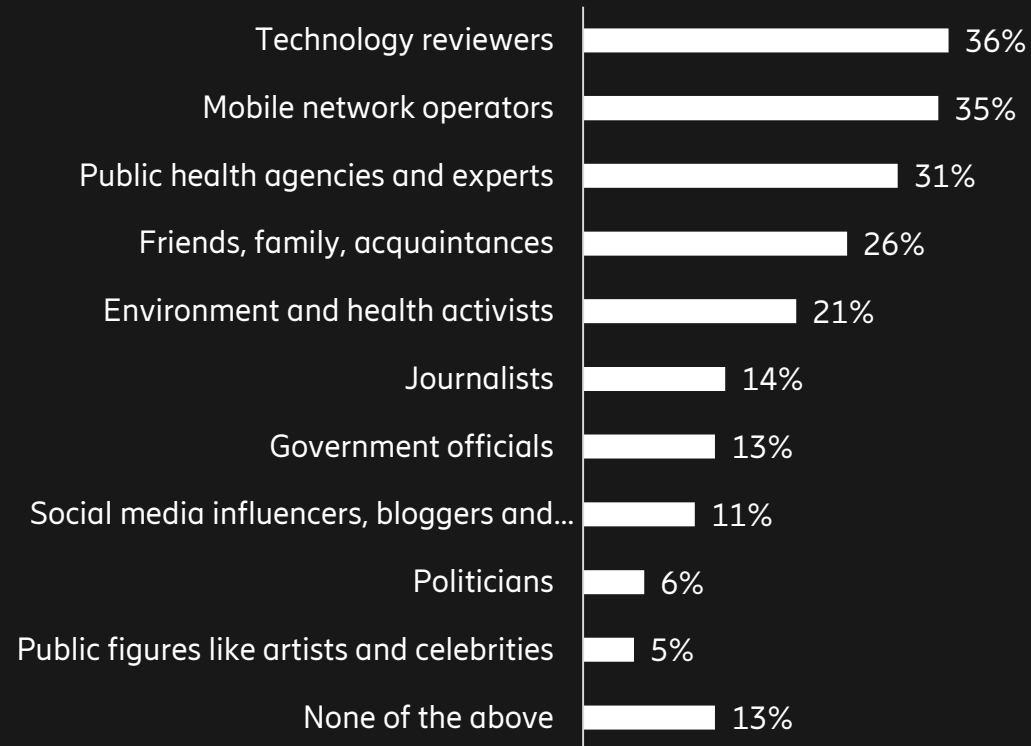
50%

Say social media and Youtube have shaped their current understanding of 5G

58%

Are uncertain and wonder what is true and what is false around 5G

Who do you trust most when it comes to information about 5G?



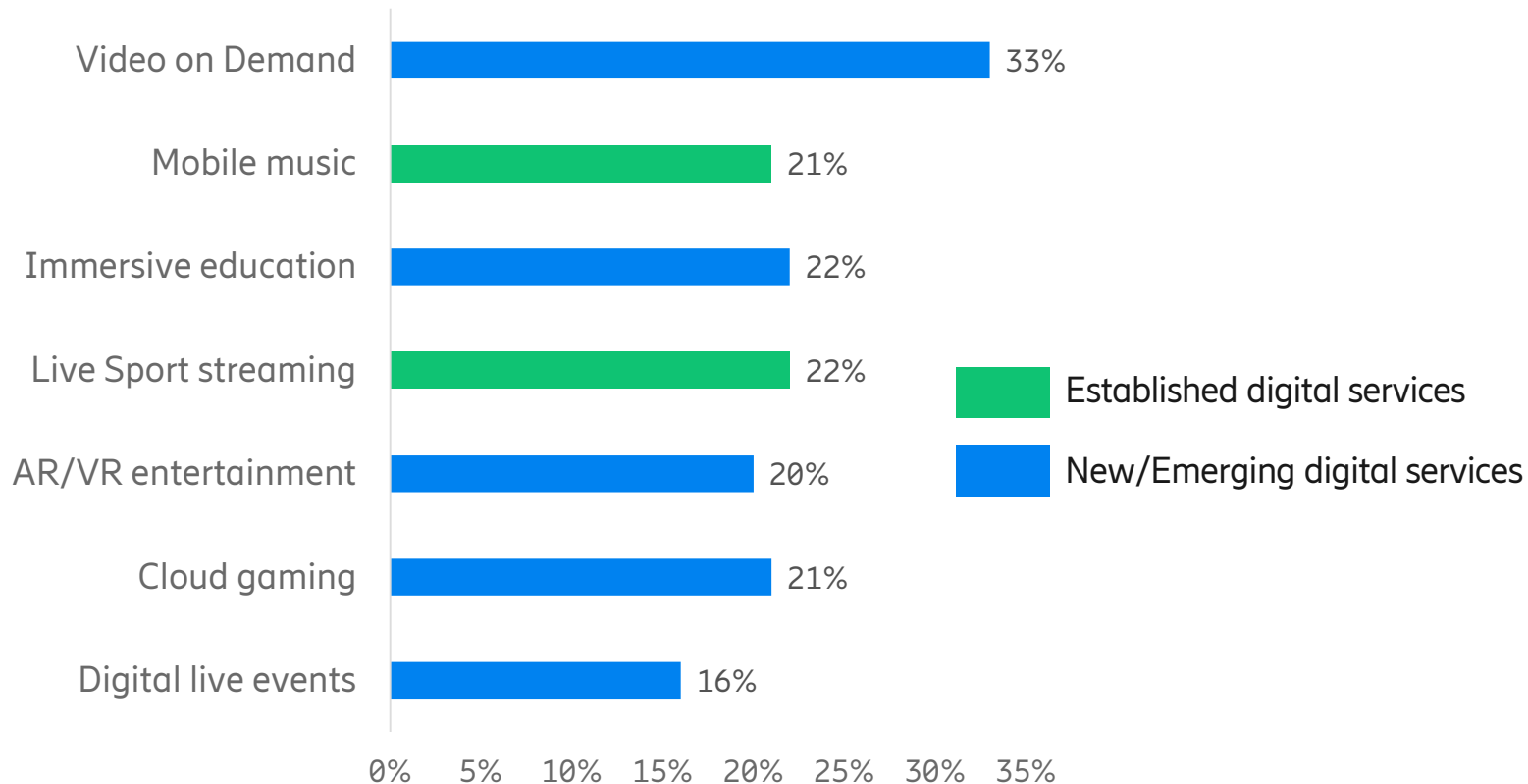
7 in 10

expect that benefits of 5G are explained in a better way

# 55% consumers plan to spend on at least one digital services despite the pandemic



% planning to spend on services over the next 12 months (among those looking to take up 5G)



3 in 10

non 5G considerers feel new exclusive apps and services might convince them to take up 5G



# StartUP5G Program

Connecting our customers with 5G startup ecosystem across the globe



# Diverse set of startups driving tech innovation over 5G



## Hardware manufacturers



AR multiplayer gaming kit



World's first 5G VR headset



4K live streaming wearable camera



## Software/App developers



The AR lens for media content



3D AR edutainment over 5G



Premium eSports streaming



AI driven 5G live sports event streaming



Multiplayer AR outdoor gaming



Global edge reflector network for collaborative apps

