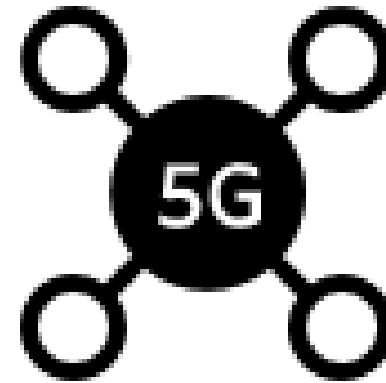


# 5G consumer potential amidst COVID-19

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



# The first year of 5G in numbers



2.6x

higher data usage 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 million

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

Close to 30% of South Korea's total mobile data traffic on 5G in July generated by 11.3% subs.

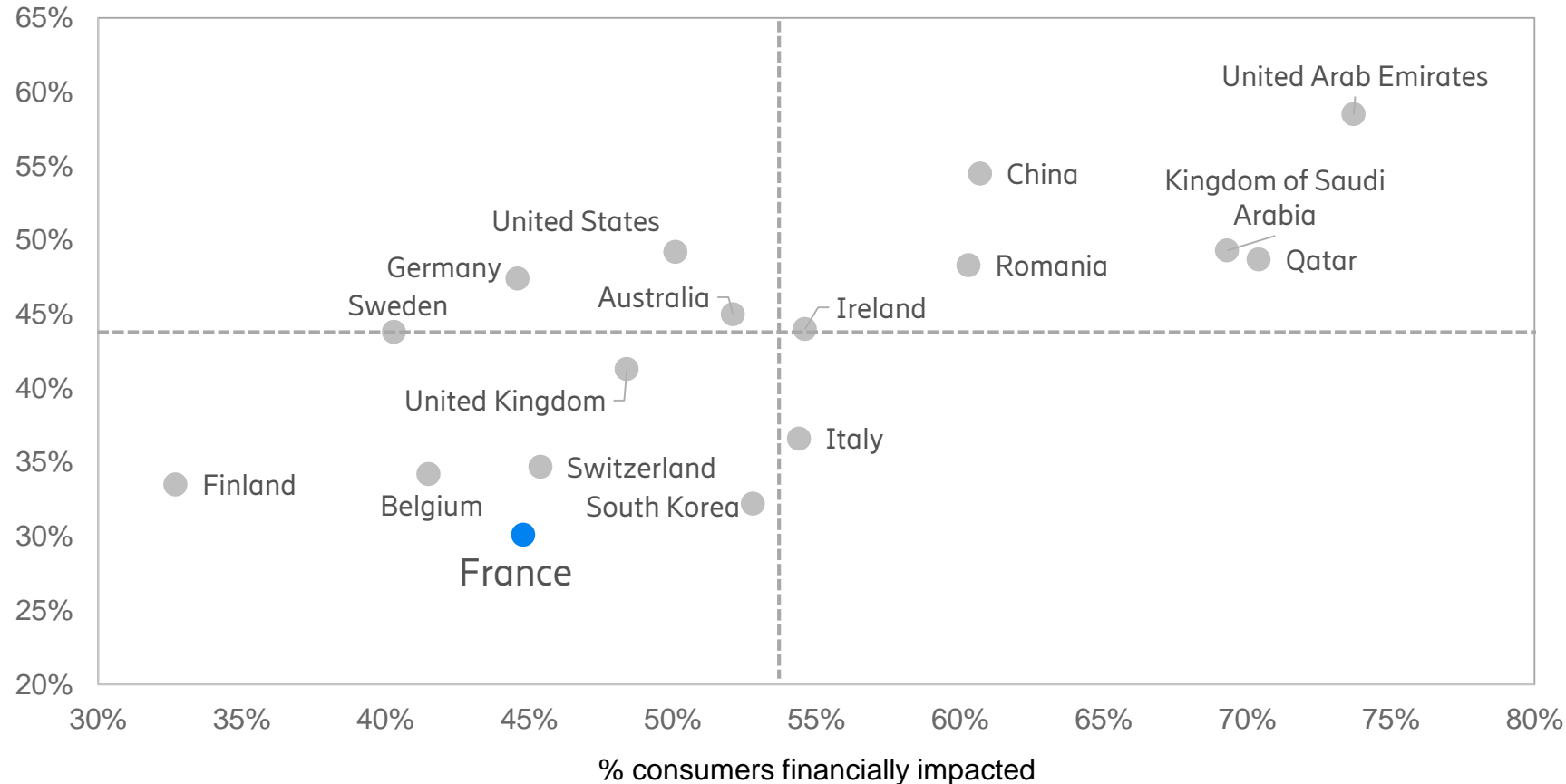
3.9% - 1.9%

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

# Pandemic has had an economic impact but consumer's are optimistic of a recovery



% Expect household income to improve over the year



**45%**  
French consumers in our survey say their household income has been impacted by crisis but

**30%**  
expect this situation to improve in next 12 months.

# 5G consumer readiness in France



70% expect resilient connectivity



25%

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

Awareness of 5G



20%

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

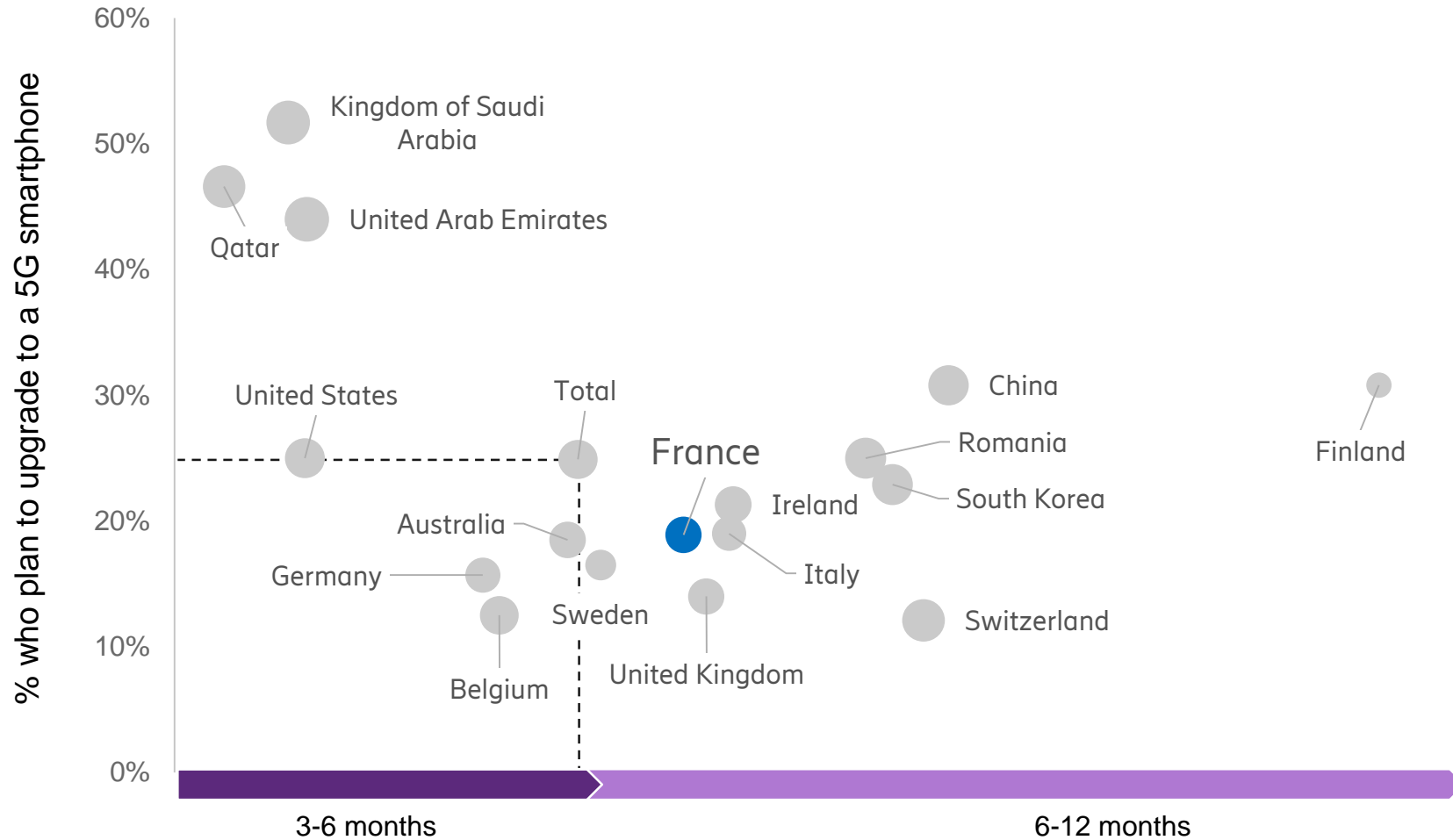
Impact of pandemic on 5G premium



1 in 3

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

# 3.5 million French consumers could take up 5G



**20%**  
French consumers expect to upgrade to a 5G smartphone within a year, 40% of these are existing iPhone owners

# Truth behind 5G misinformation



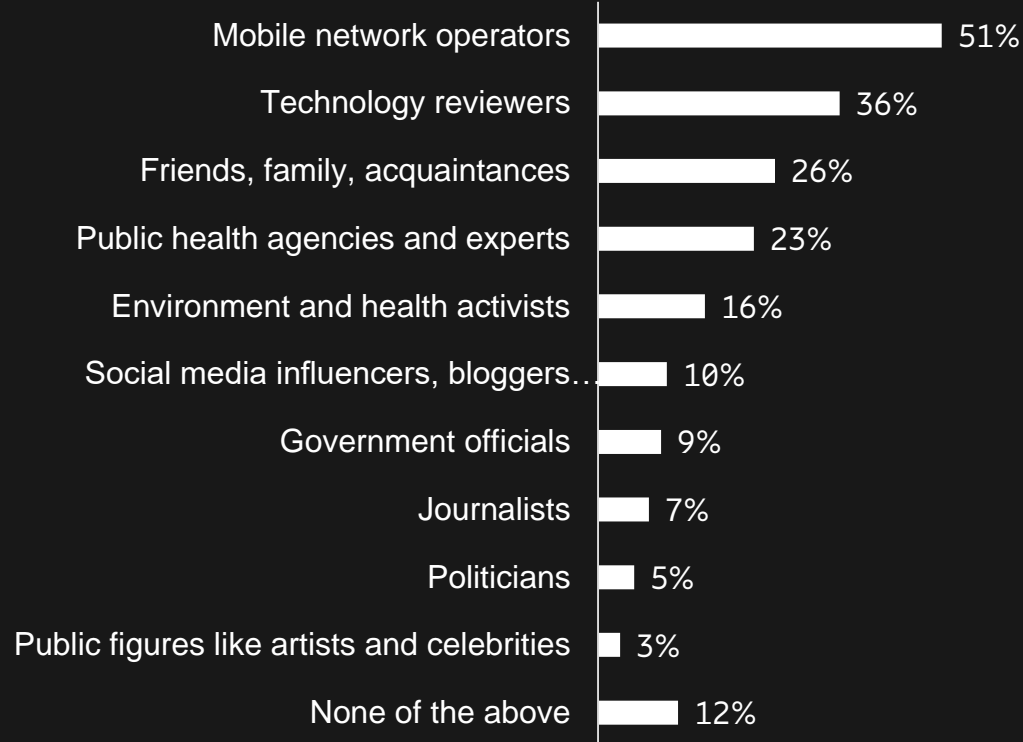
51%

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

62%

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?



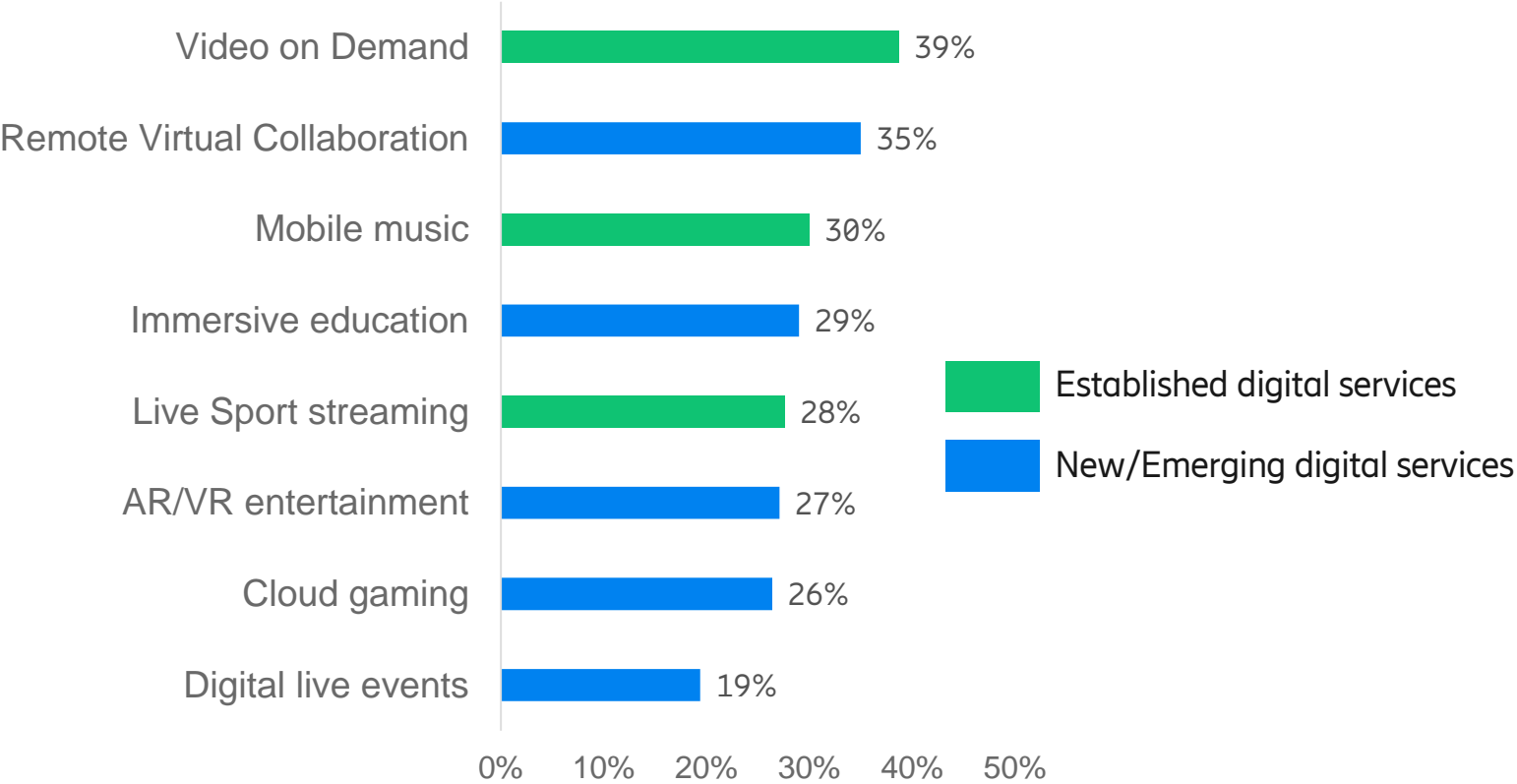
7 in 10

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

# A third of french consumers plan to spend on digital services despite the pandemic



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



**Half**  
of those not looking to upgrade feel new exclusive apps and services could 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



