



# 5G Consumer Survey

Key motivations and use cases in 2019 and beyond

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September 2017





# Methodology & Approach

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## Survey sample

Participants in each country:



1,002



1,010



1,000



1,006



1,002



824



**5,844**  
WW total



Smartphone owners



Census representing mix of gender,  
age, region, carrier, and OS



Data weighted by tier to represent the  
next smartphone market

Online: Approximately 35 min

Fielding dates: July 30 to August 5, 2017







# Consumer 5G survey key findings

>86%

Need or would like faster connectivity on next smartphone

~50%

Likely to purchase a phone that supports 5G next



Top use case—use cellular connectivity everywhere

~50%

Desire/prefer unlimited data plan when they have 5G

## Top 3 reasons for 5G:

**10x**  
faster  
speeds

**10x**  
quicker  
response time

More  
**cost-effective**  
data plans

Source: "Making 5G a reality: Addressing the strong mobile broadband demand in 2019 and beyond," September 2017, jointly published by Qualcomm Technologies, Inc. and Nokia.



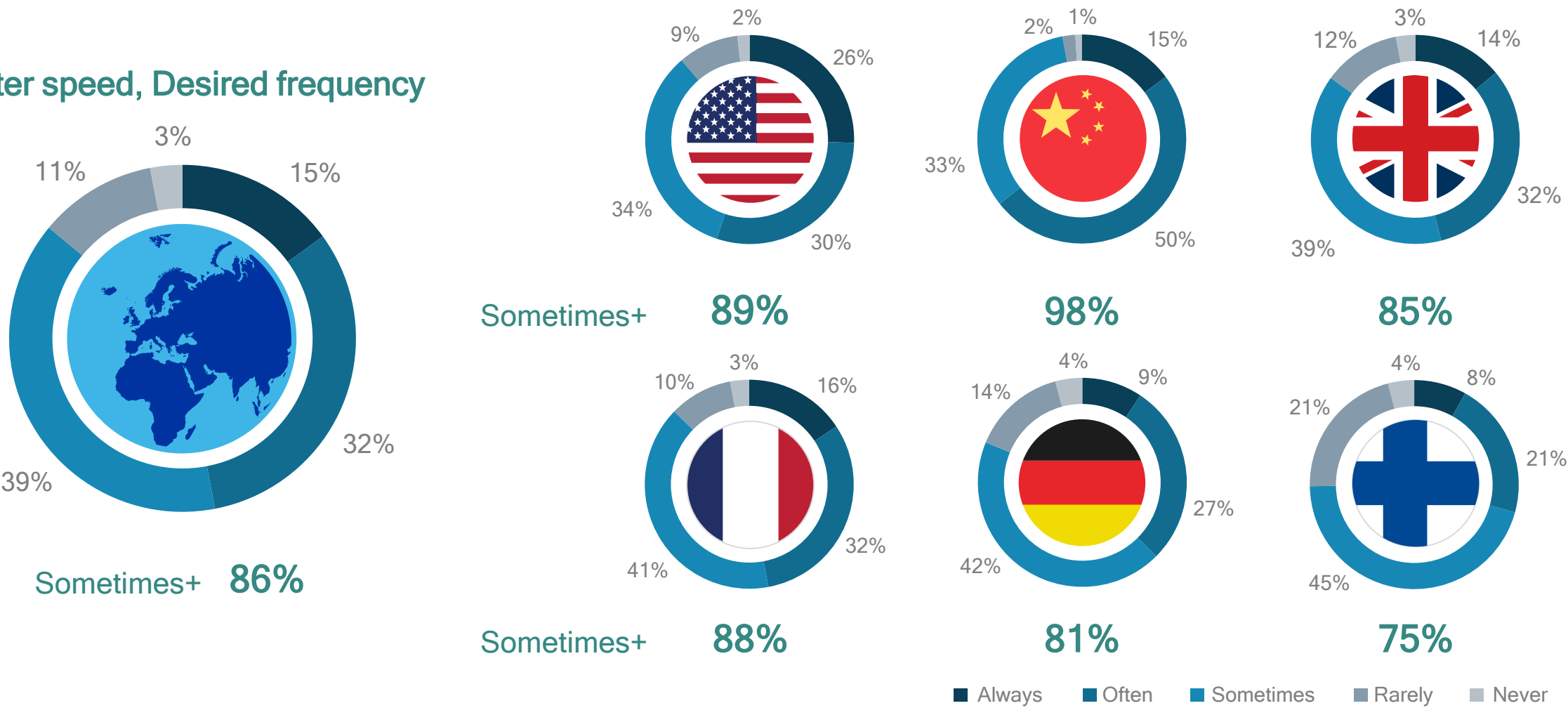


86%

of respondents want  
faster connectivity for  
their smartphones

# 86% of respondents want faster smartphone connectivity

## Faster speed, Desired frequency



CA2.Thinking about all the activities that require connectivity (i.e. internet browsing, video streaming, social media, messaging, etc.), how often do you need or would like those connected activities to run faster than typical on your current primary smartphone? (Total N=5484 for Global; N=1002 for US; N=1010 for China; N=1000 for UK, N=1006 for France; N=1002 for Germany; N=824 for Finland)



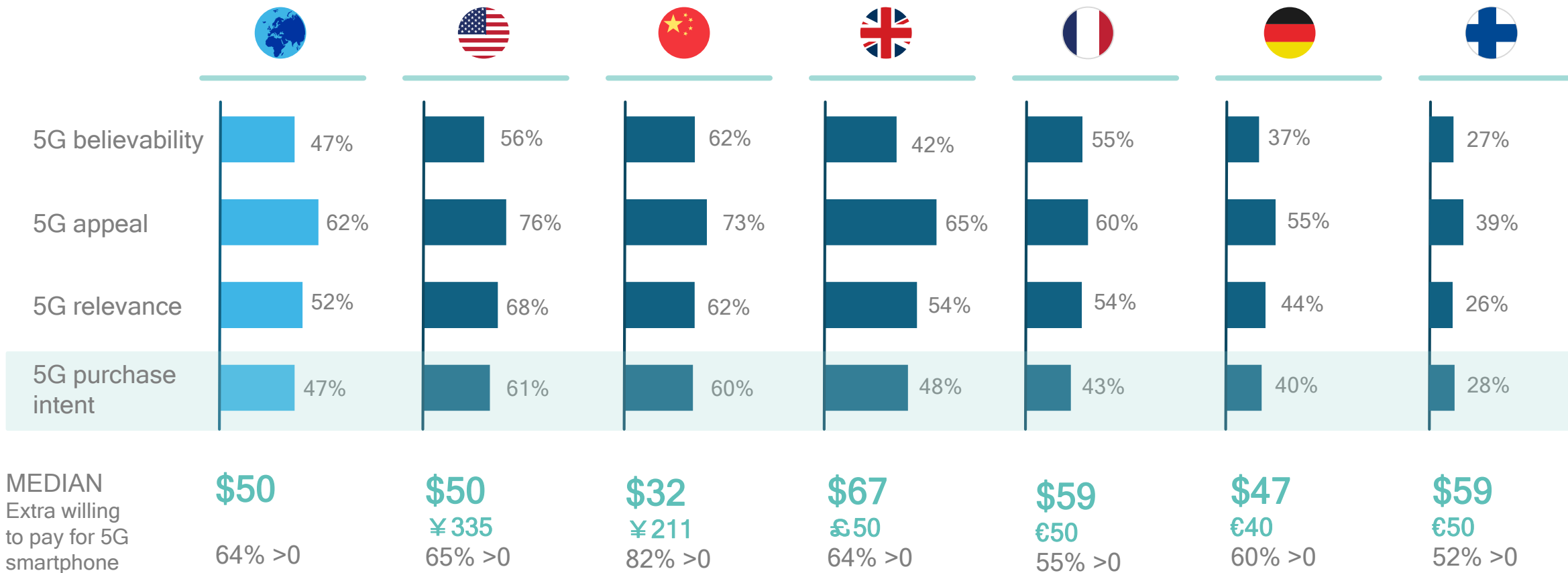


50%

of respondents  
are likely to be  
early 5G adopters

# Close to 50% of respondents likely to be early 5G adopters

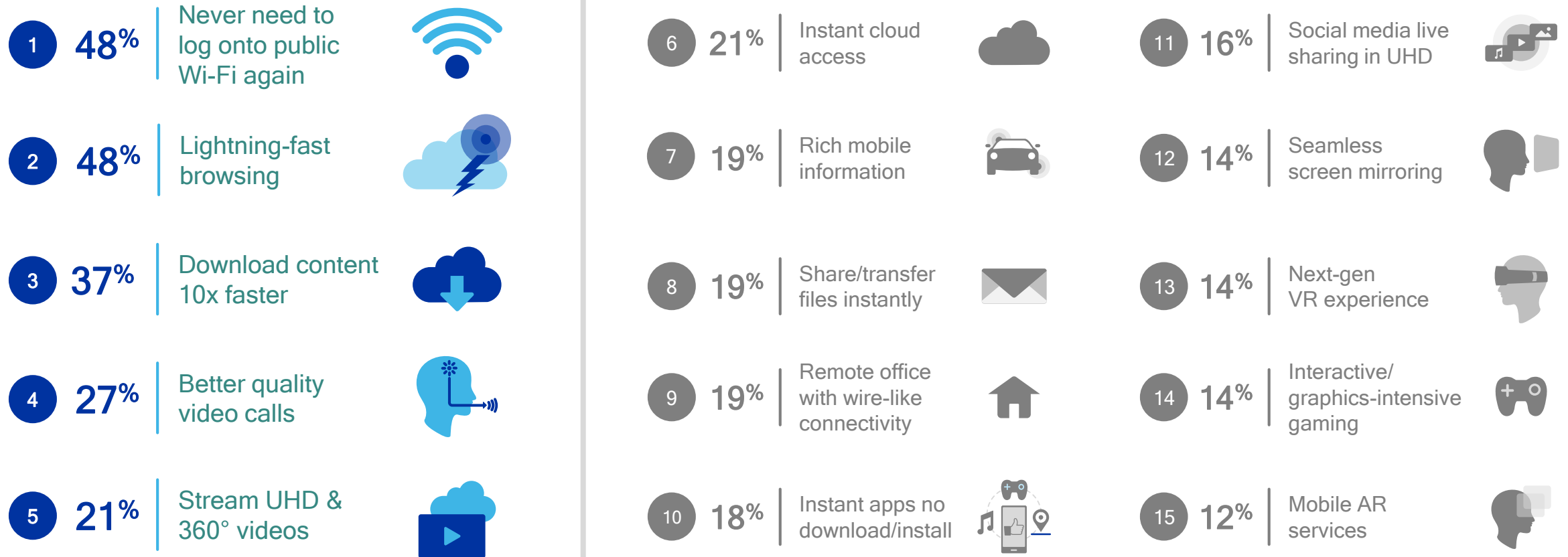
With over 60% of them willing to pay on average \$50 extra for 5G



CT1. Based on this description, how believable are the benefits of 5G? CT2. Based on this description, how appealing is 5G to you?  
CT3. Based on this description, how unique is 5G to you? CT4. Based on this description, how relevant is 5G to you personally and how you use technology?  
CT5. For your next smartphone, how likely are you to purchase a phone that has 5G? CT7. You mentioned earlier that you plan to spend [INSERT THE ANSWER FROM S11] [INSERT CURRENCY SIGN] on your next smartphone. How much extra would you be willing to pay out of pocket for 5G on top of the price of your next smartphone? (Total N=5844 for Global; N=1002 for US; N=1010 for China; N=1000 for UK, N=1006 for France; N=1002 for Germany; N=824 for Finland)

# 5G will address the pain points of today's mobile networks

## Top 5G eMBB use cases in 2019 and beyond





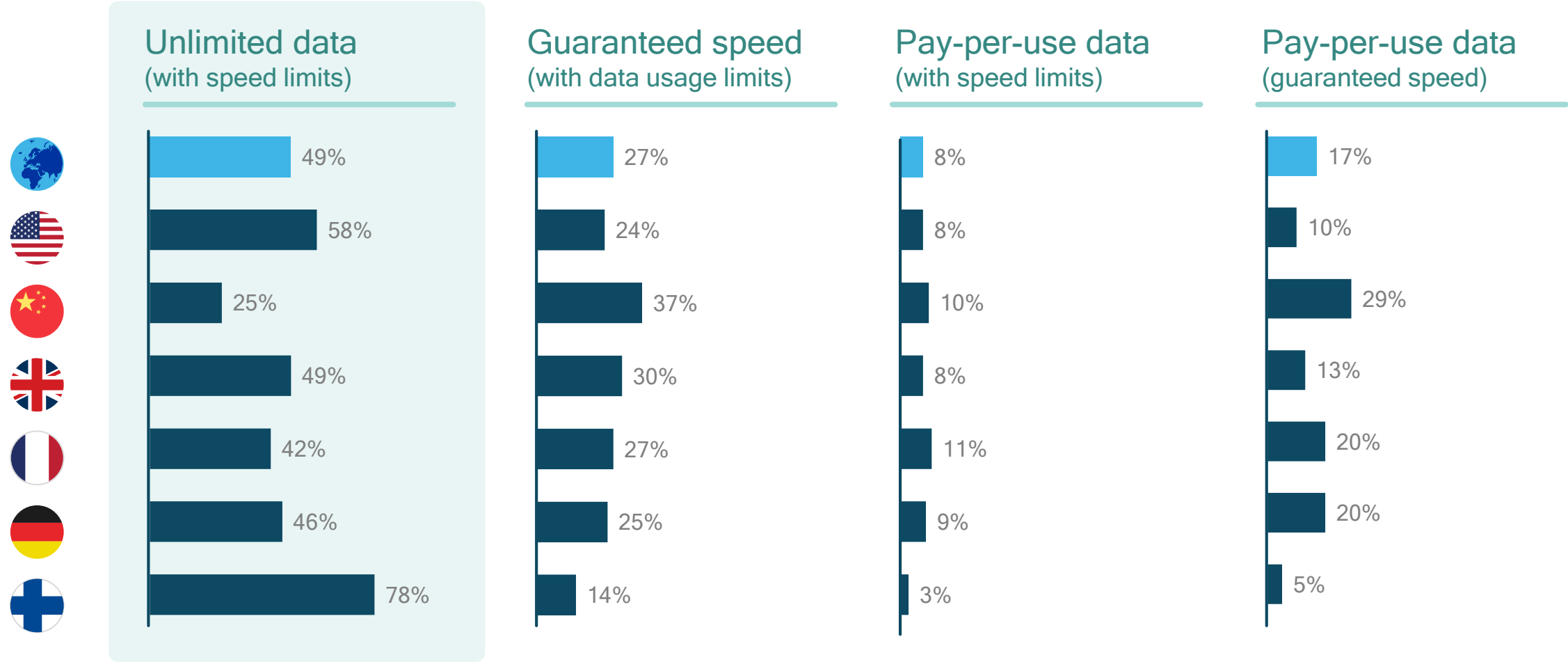
A woman with long dark hair in a braid, wearing glasses and a dark blue sleeveless top with white stars, is smiling and looking at a tablet computer. She is standing in a library with tall bookshelves filled with books in the background. A large blue circular graphic with the text '50%' is overlaid on the image.

50%

of respondents  
prefer unlimited  
data plan with  
their 5G device

# The desire for unlimited data plan

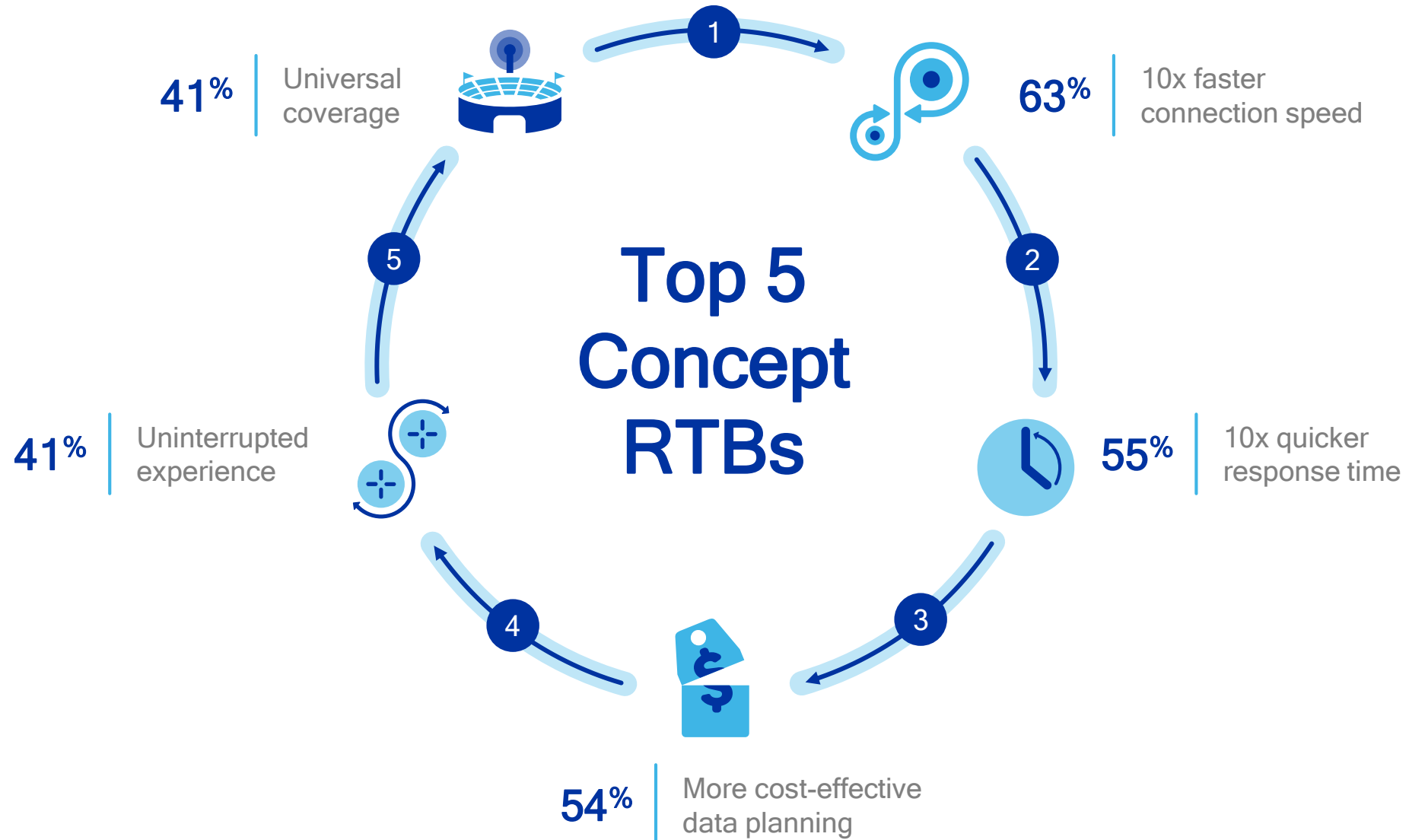
Close to 50% of respondents prefer unlimited data plan with their 5G device



F7. Assuming your next smartphone would be 5G enabled, please indicate which type of 5G cellular data service you would prefer for your next smartphone? (Total N=5844 for Global; N=1002 for US; N=1010 for China; N=1000 for UK; N=1006 for France; N=1002 for Germany; N=824 for Finland)



# Top 5G motivators are speed, latency, low cost-per-bit



# Thank you

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