

5G AWARENESS & NEEDS

EUROPEAN STUDY

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GAME CHANGERS



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INTRODUCTION

1

METHODOLOGY

SAMPLE DESCRIPTION



Adults (18-65 y.o.) in Europe

SAMPLE SIZE



n = 7350

QUOTA



For each country:

- Gender
- Age
- Region

DATA COLLECTION METHOD



Online on Ipsos panel

AVG. INTERVIEW DURATION



10 minutes

FIELDWORK PERIOD

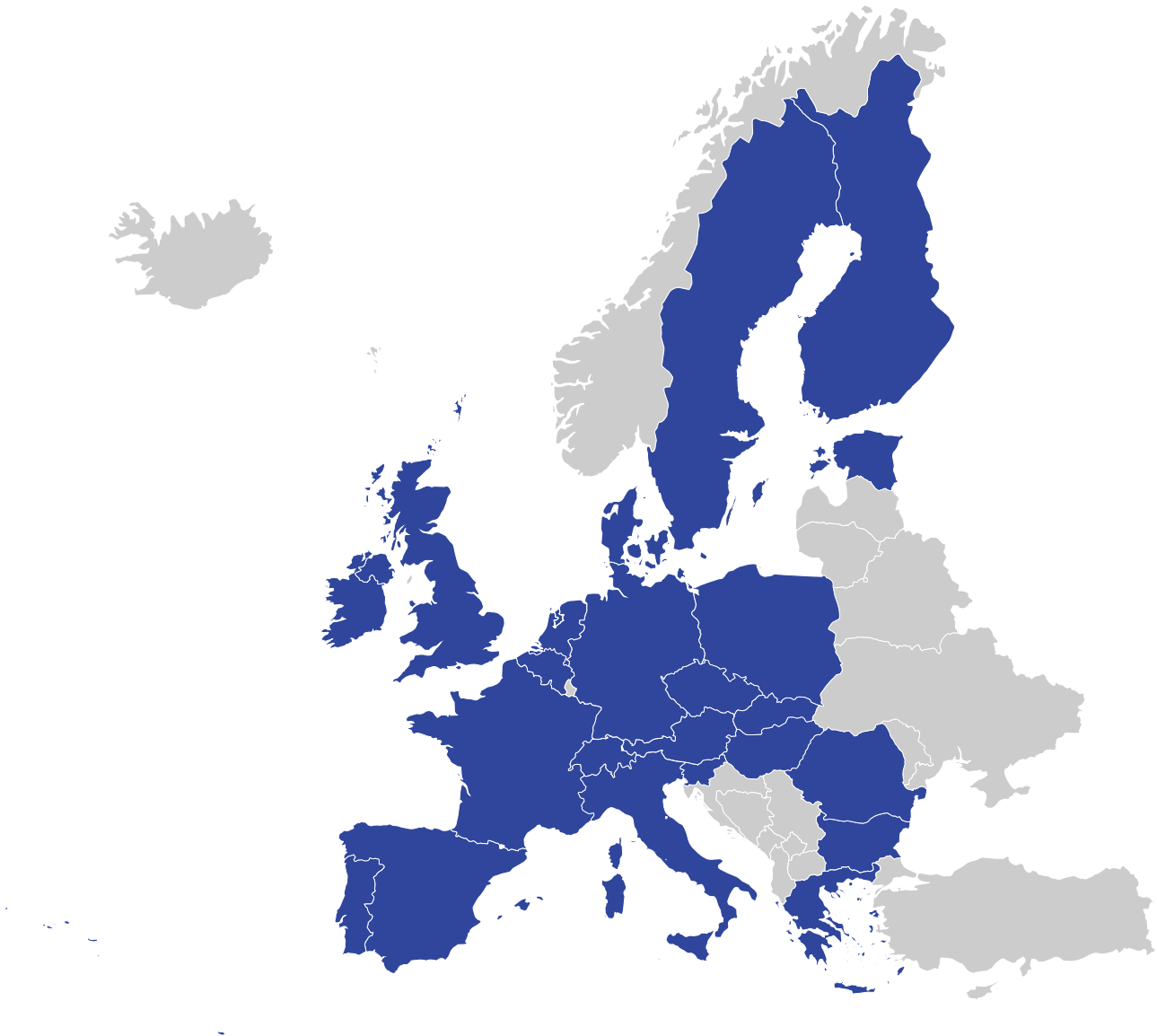


August 2020

GEOGRAPHICAL SCOPE

The study is conducted in 23 countries

- | | | | |
|----|----------------|----|-------------|
| 1 | Austria | 13 | Italy |
| 2 | Belgium | 14 | Netherlands |
| 3 | Bulgaria | 15 | Poland |
| 4 | Czech Republic | 16 | Portugal |
| 5 | Denmark | 17 | Romania |
| 6 | Estonia | 18 | Slovakia |
| 7 | Finland | 19 | Slovenia |
| 8 | France | 20 | Spain |
| 9 | Germany | 21 | Sweden |
| 10 | Greece | 22 | Switzerland |
| 11 | Hungary | 23 | UK |
| 12 | Ireland | | |



i Note: The data is weighted to the national representative figures of each country and to the population size of each country.

i EU27 countries that are not included in this survey are: Croatia, Cyprus, Latvia, Lithuania, Luxemburg, Malta and Norway.

i When looking at 'European' results, data is weighted according to the population size of the country.

RESULTS

2

AWARENESS & ATTITUDES TOWARDS 5G

2.1

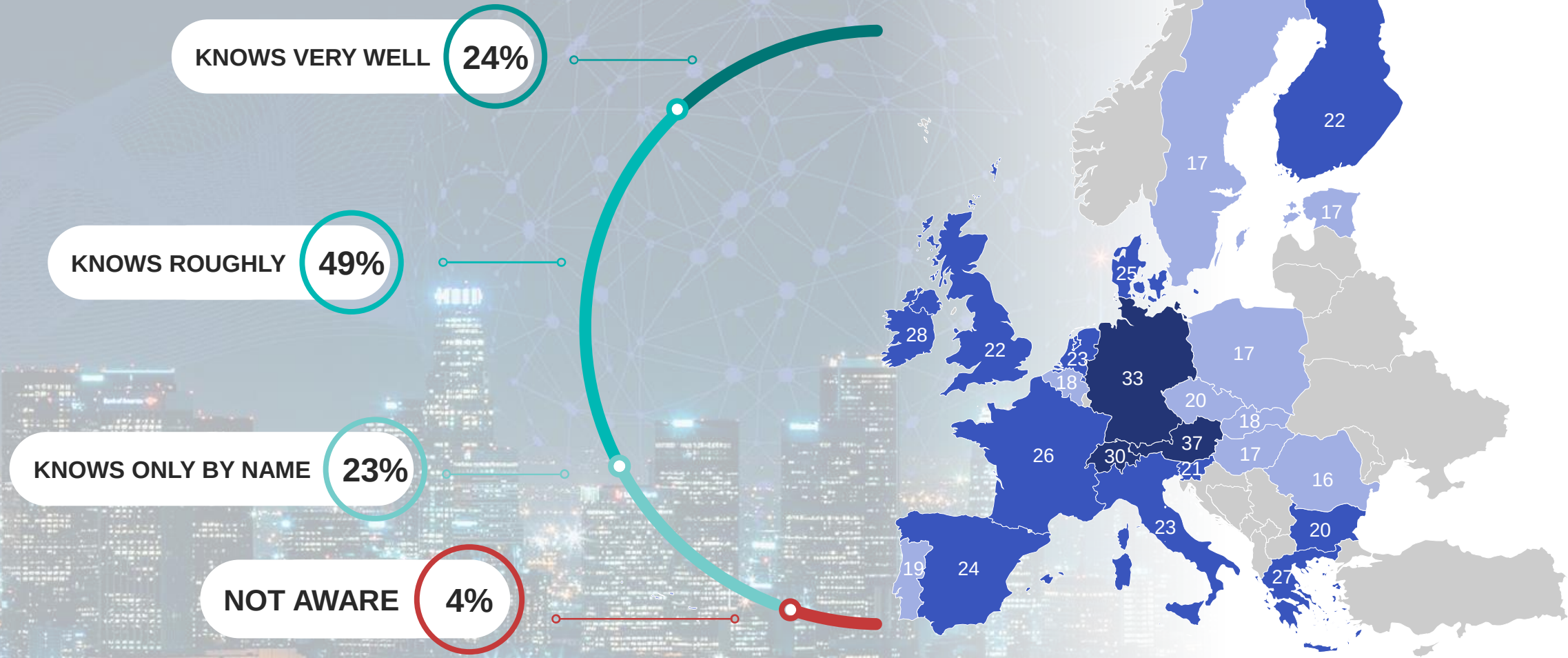
2. Results

AWARENESS

Almost all Europeans have heard about 5G, however only 1 out of 4 Europeans claim to have a good understanding about 5G.

AWARENESS OF 5G IN EUROPE

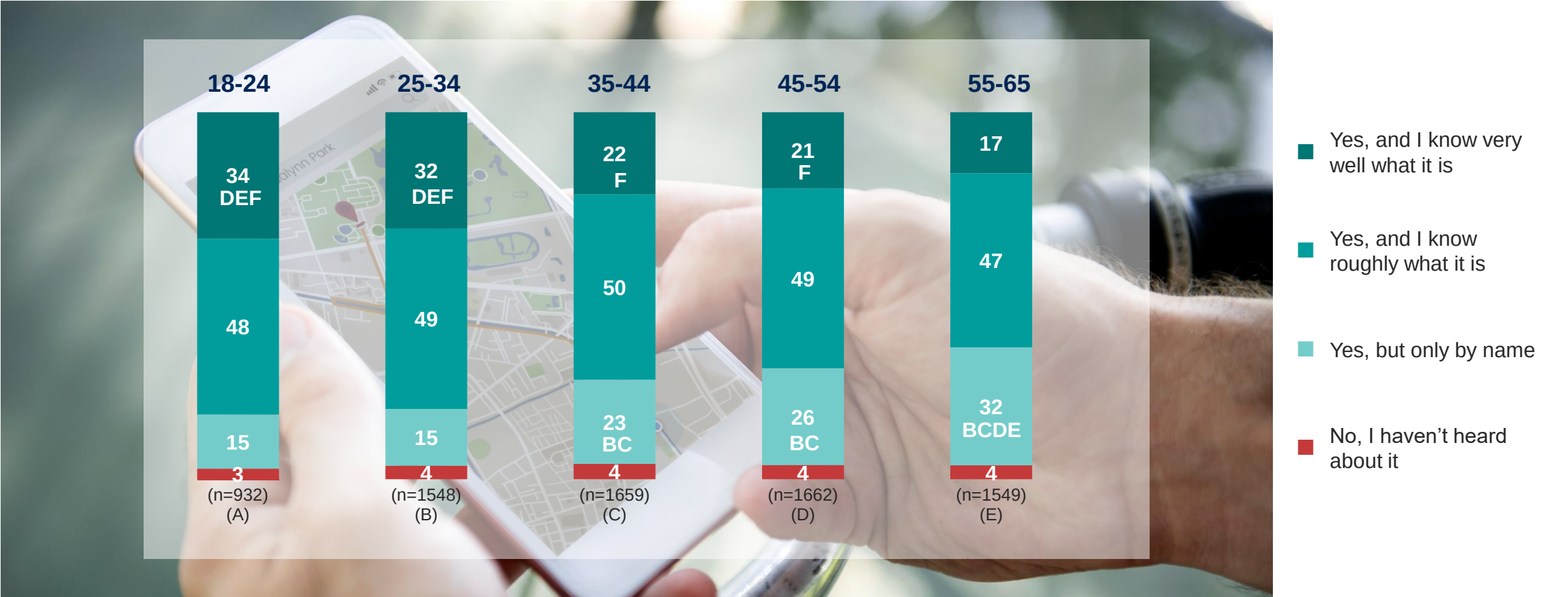
Almost all Europeans have heard about 5G, however only 1 out of 4 Europeans claim to have a good understanding about 5G.



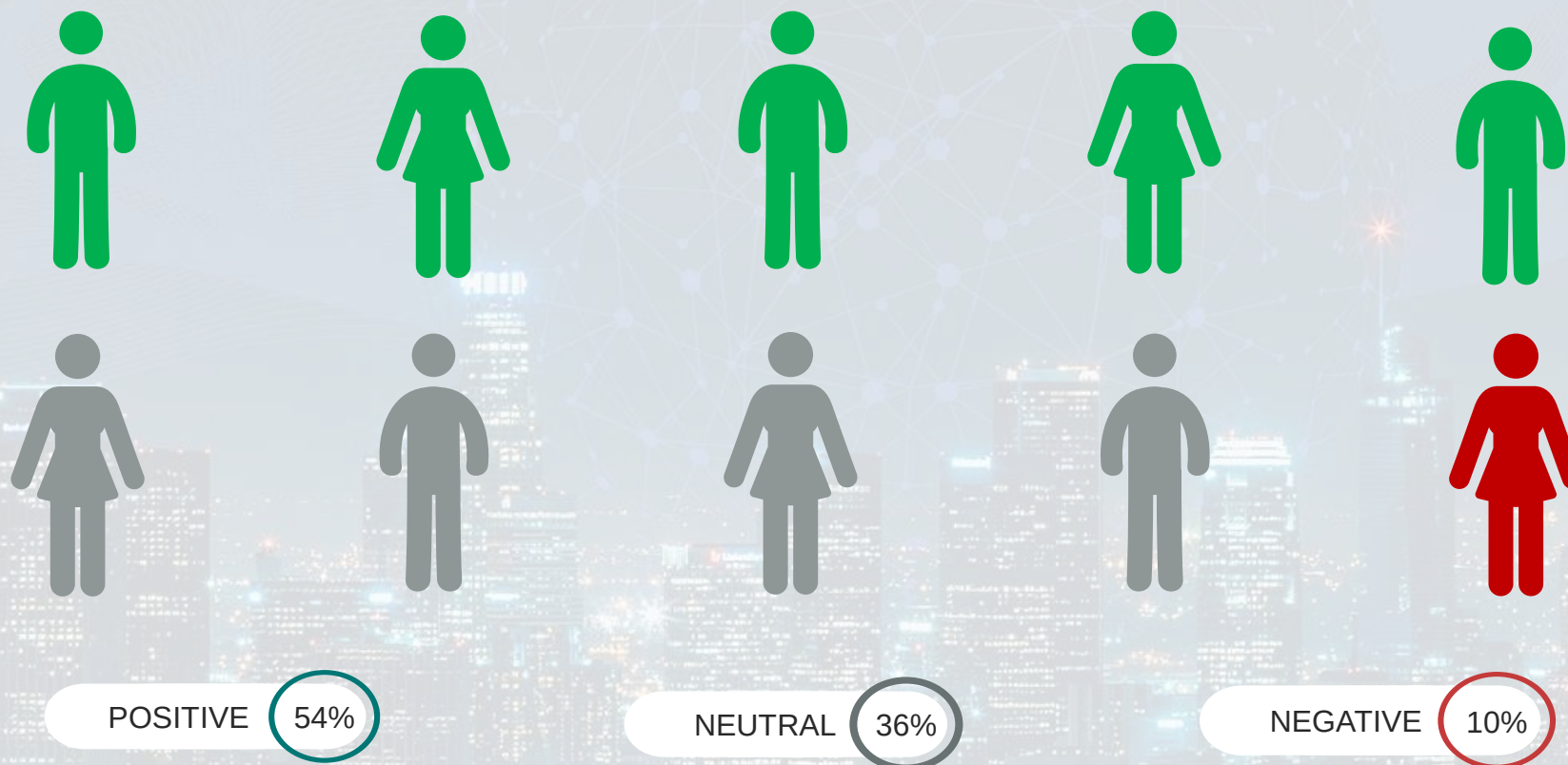
A1. Have you heard about the mobile technology 5G?
Yes, and I know very well what it is
Yes, and I know roughly what it is
Yes, but only by name
No, I haven't heard about it

AWARENESS OF 5G BY AGE

Younger Europeans have a higher real understanding of 5G than older (45+) citizens



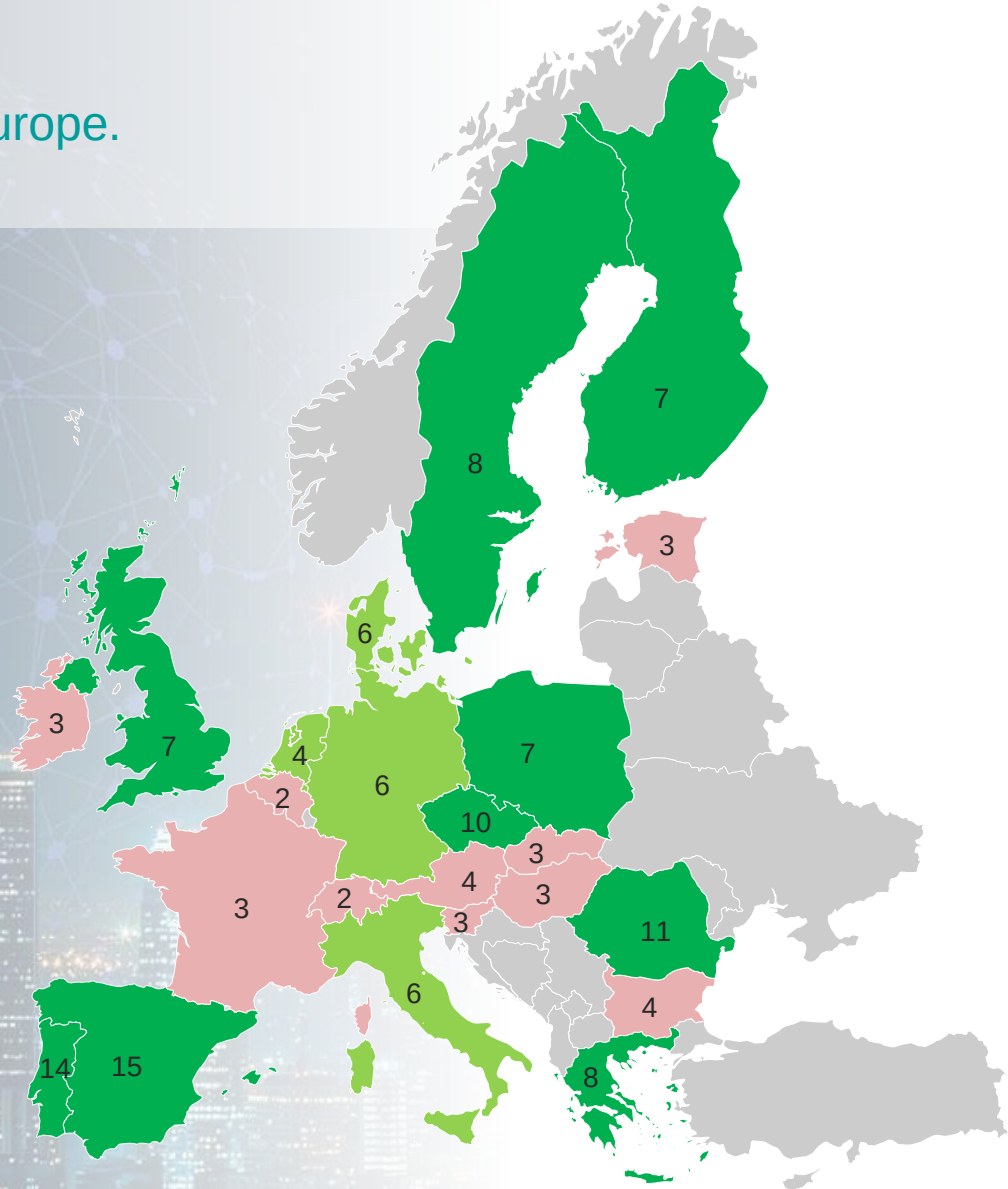
FOR EVERY EUROPEAN NEGATIVE ABOUT 5G... THERE ARE 5,5 POSITIVE ABOUT 5G



POSITIVES / NEGATIVES RATIO 5G

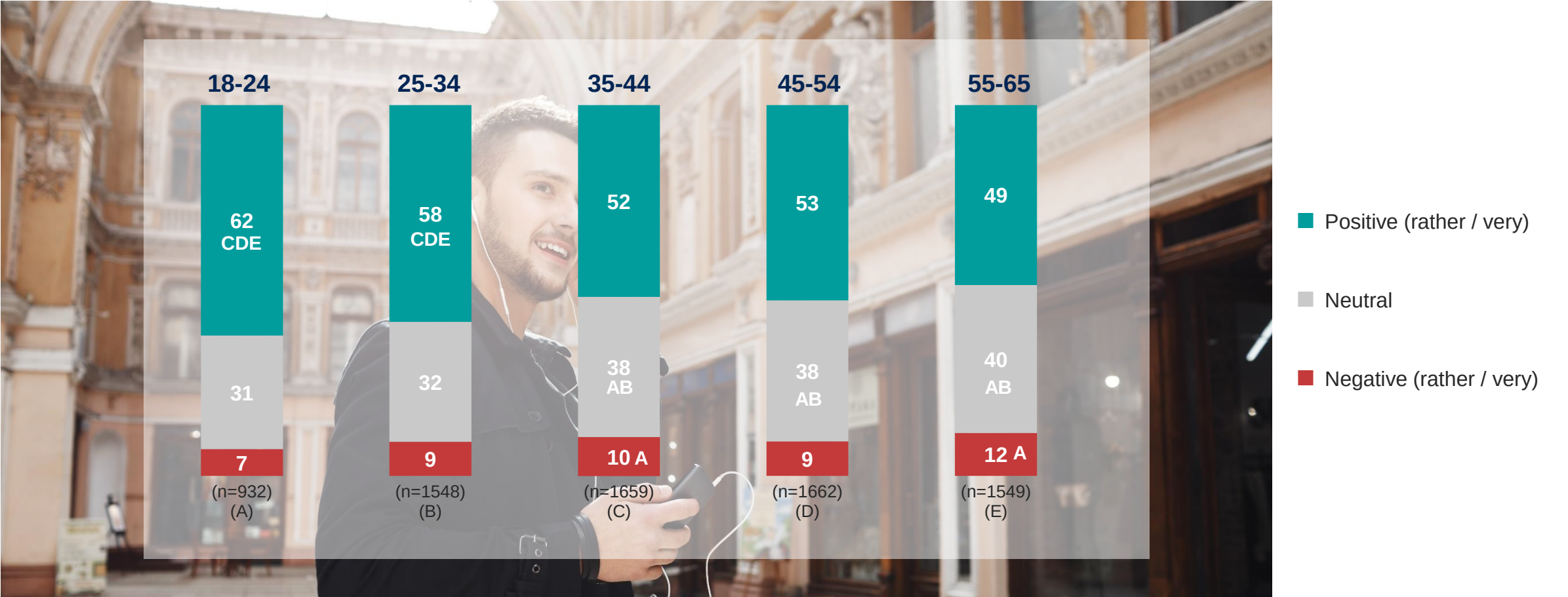
The positives / negatives ratio varies a lot between countries in Europe.

Positive / negative ratio: 5,5



ATTITUDE TOWARDS 5G BY AGE

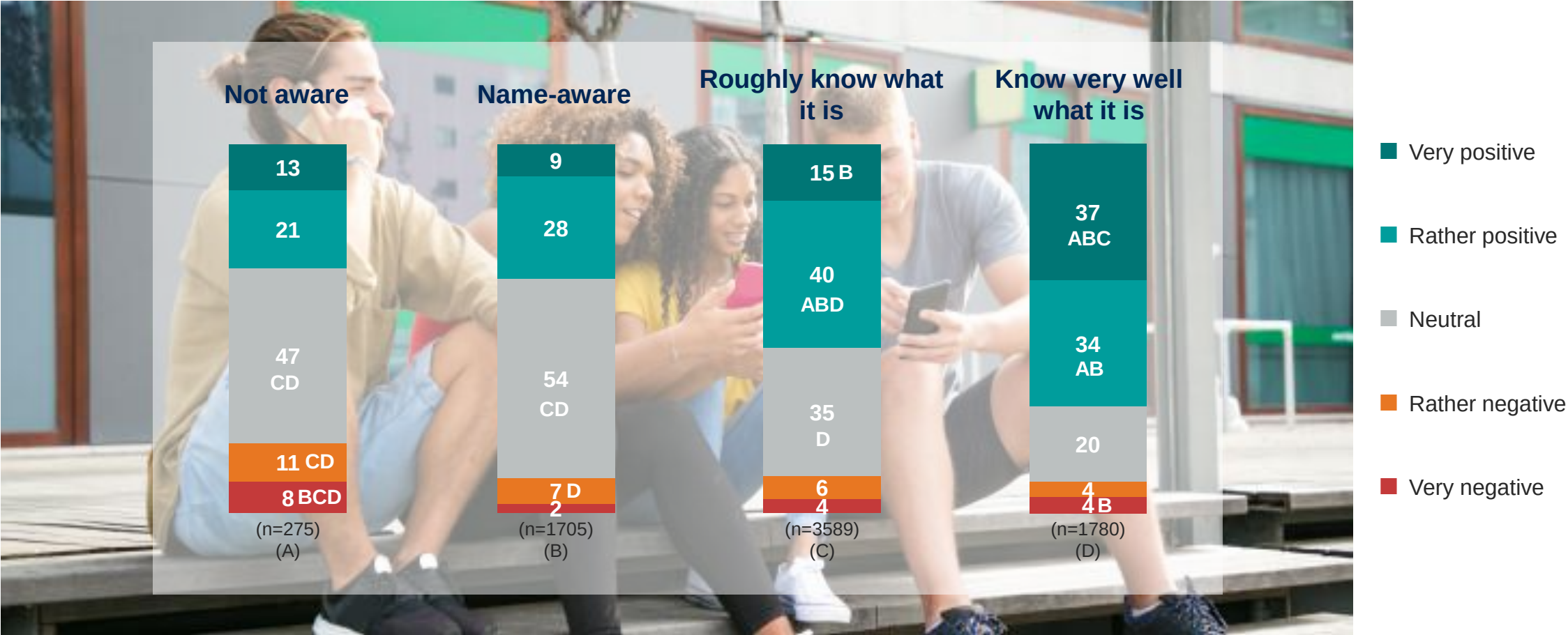
Younger Europeans have a more positive attitude towards 5G. On the other hand, older Europeans are more often neutral towards 5G.



i A letter next to the value means that this value is significantly higher compared to the column the letter is referring to (95% confidence)

ATTITUDE TOWARDS 5G BY AWARENESS

Attitude towards 5G correlates strongly with having a good understanding about 5G.



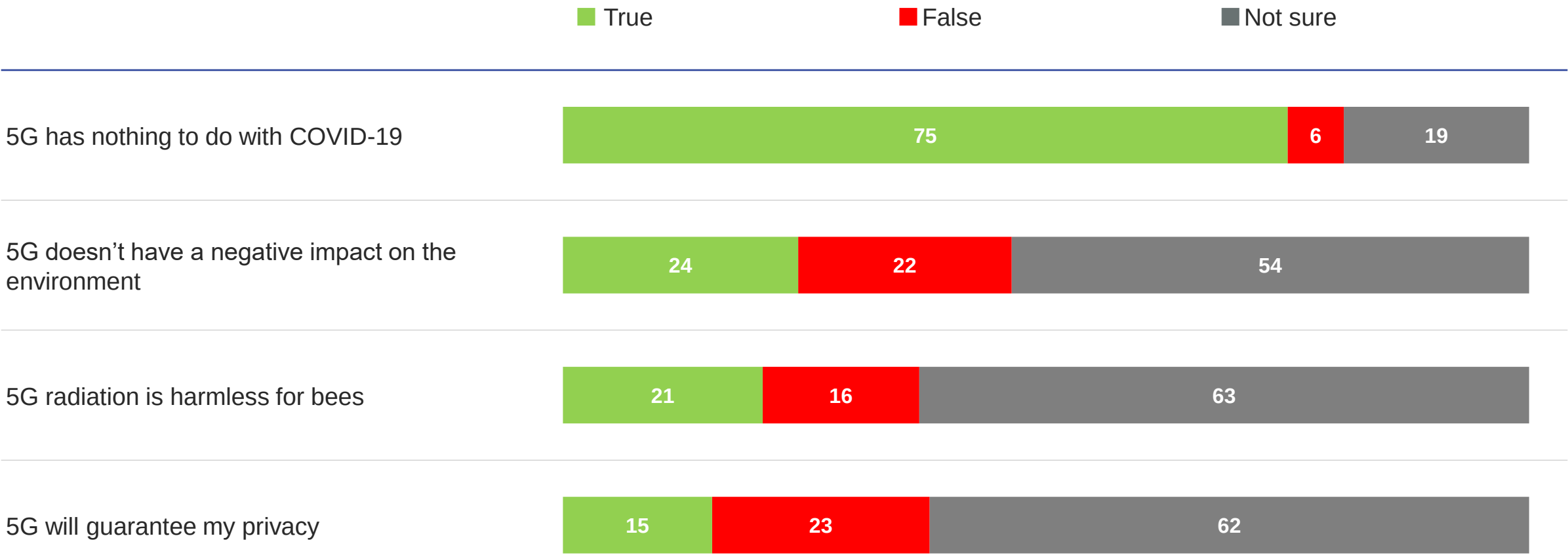
5G MYTHS

**A minority of Europeans believe the 5G
“myths”.**

**However a substantial amount of
Europeans is not sure that the myth is not
true.**

ATTITUDE TOWARDS 5G MYTHS

50-60% of the Europeans are unsure about some of the 5G myths, and about one out of five, seems to believe the myths.



COMMUNICATION

2.2

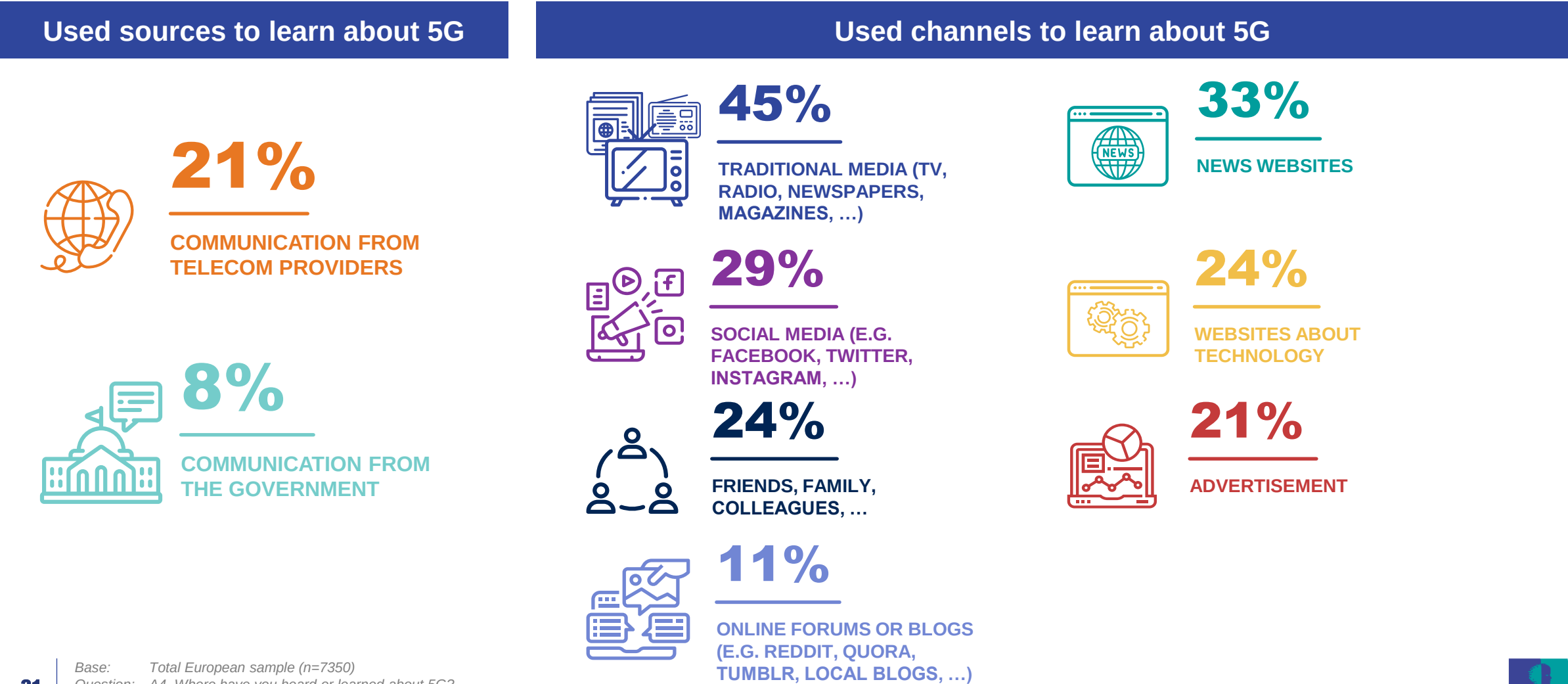
2. Results

COMMUNICATION

Social media and advertisements are the least trusted information channels about 5G. The number of information sources, and the degree of being informed, has a high impact on the attitude of 5G.

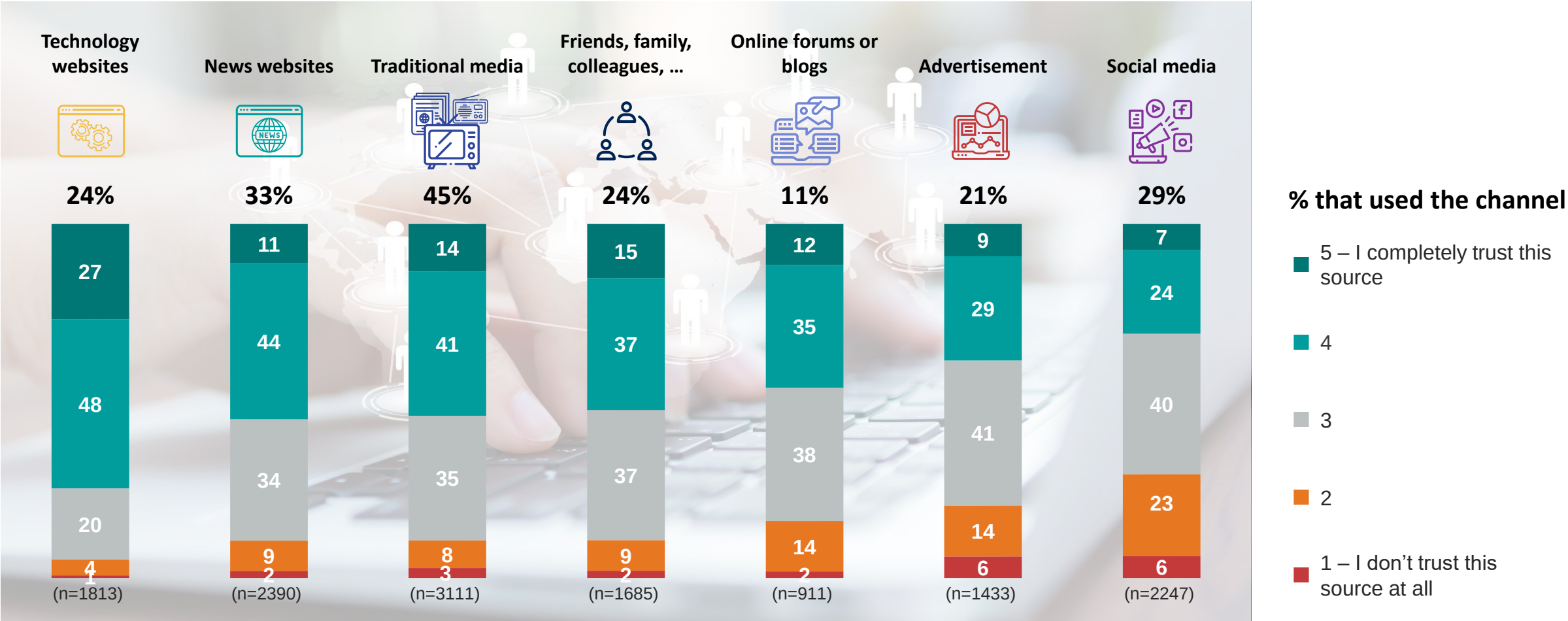
SOURCES USED FOR INFORMATION ABOUT 5G

Europeans mostly heard or learned about 5G from traditional media, news websites and social media. Only 8% of the Europeans learned about 5G from their government.



TRUST IN SOURCES

Technology websites have the highest level of trust for information about 5G. Advertisements and social media are the least trusted sources.



22 Base: Total European sample (n=7350)
Question: A5. To what extent do you trust the information about 5G from this source?

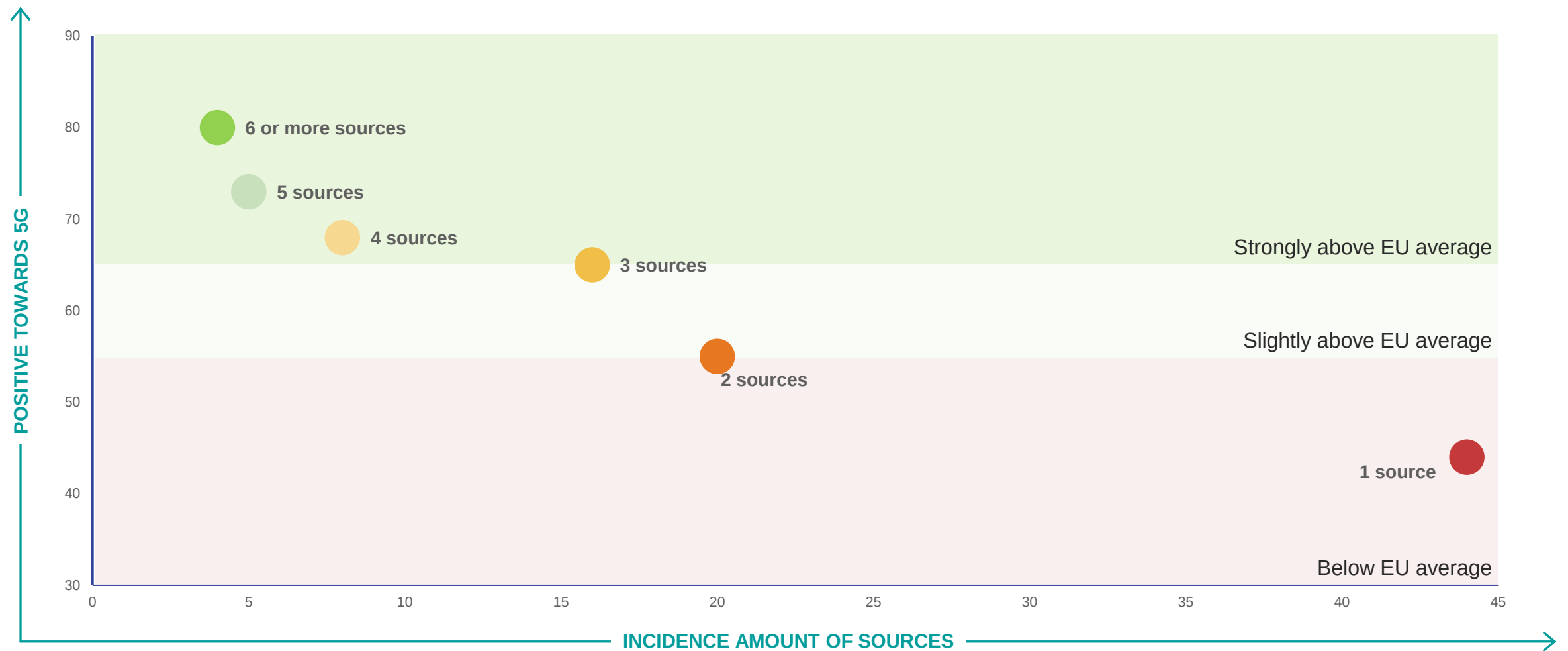
TRUST IN SOURCES

The government and telecom providers are seen as quite trusted sources regarding information about 5G



IMPACT OF NUMBER OF SOURCES ON ATTITUDE TOWARDS 5G

The more you educate people, the more they hear (positive) information about 5G, the better the attitude towards 5G.



ADVANTAGES OF 5G

2.3

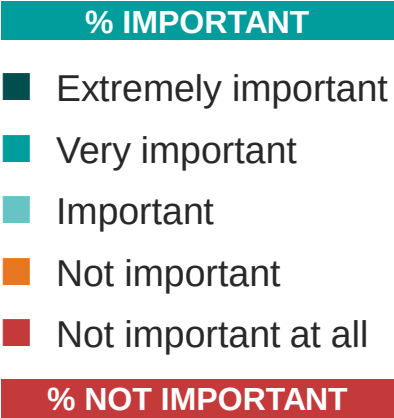
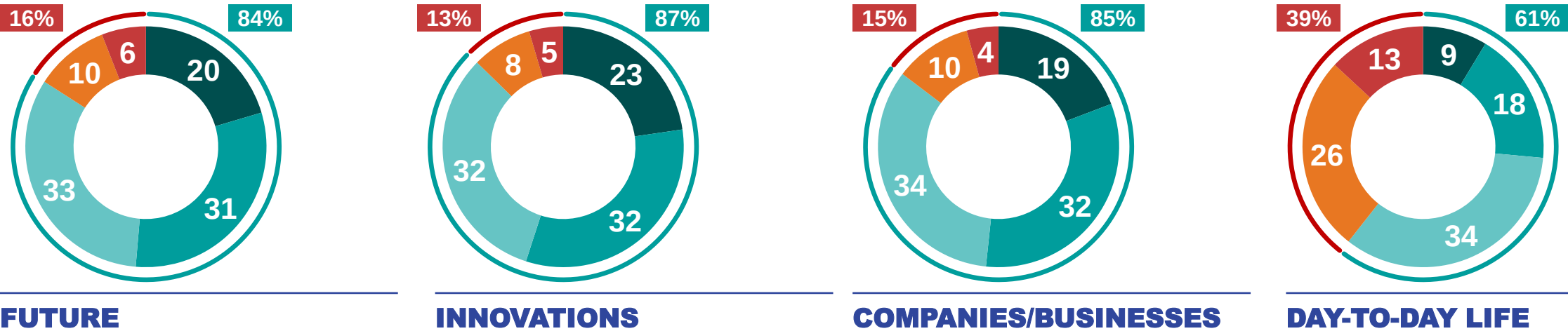
2. Results

ADVANTAGES

Higher speed and higher capacity are the most known 5G advantages over 4G. Europeans with a better understanding of 5G are better aware that 5G enables new technologies, possibilities.

IMPORTANCE

While Europeans think ‘5G’ will be important for business, development of innovations, they are much less convinced about it becoming important for their personal day to day lives.



28 Base: Total European sample (n=7350)
Question: I1. To what extent do you think the roll-out of 5G is important for companies and businesses? / I2. To what extent do you think the roll-out of 5G is important for you, your personal day-to-day life? / I4. To what extent do you think the roll-out of 5G is important for the development of new innovations? / I5. To what extent do you think the roll-out of 5G is important for being ready for the future?

PERCEIVED ADVANTAGES OF 5G BY AWARENESS

Higher speed and capacity are the most known advantages. The new technologies that 5G can enable are better known by Europeans who have a good understanding of 5G.

	TOTAL	AWARENESS		
	(n=7061)	KNOWS VERY WELL 24% of Europeans (n=1669) – (A)	KNOWS ROUGHLY 49% of Europeans (n=3598) – (B)	NAME AWARE 23% of Europeans (n=1793) – (C)
5G is faster than 4G	69	75 C	75 C	50
5G has a higher capacity compared to 4G	49	57 BC	53 C	32
5G has a lower latency compared to 4G (faster reaction time)	36	48 BC	39 C	17
5G is more stable than 4G	32	41 BC	34 C	20
5G will enable connected vehicles and autonomous driving and other industrial applications	30	45 BC	30 C	13
5G will be able to support virtual reality and augmented reality	29	41 BC	31 C	14
More devices will be able to use the mobile network (e.g. sensors)	27	36 BC	29 C	13
5G will enable remote healthcare	18	30 BC	18 C	7
Don't think it has advantages over 4G	4	4	4	4
Don't know	11	2	6 A	32 AB

SUMMARY & RECOMMENDATIONS

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THANK YOU!

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GAME CHANGERS



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