Communication needs in times of crisis
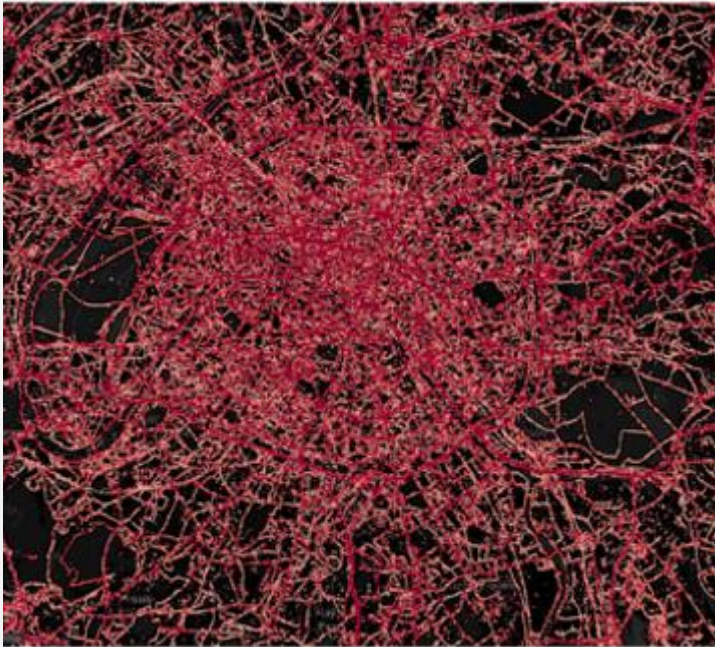
COVID-19 impact on consumer behaviors

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COVID-19 impact —worldwide lockdown restriction effects on mobility and mobile traffic levels

Paris (France) — March 2020
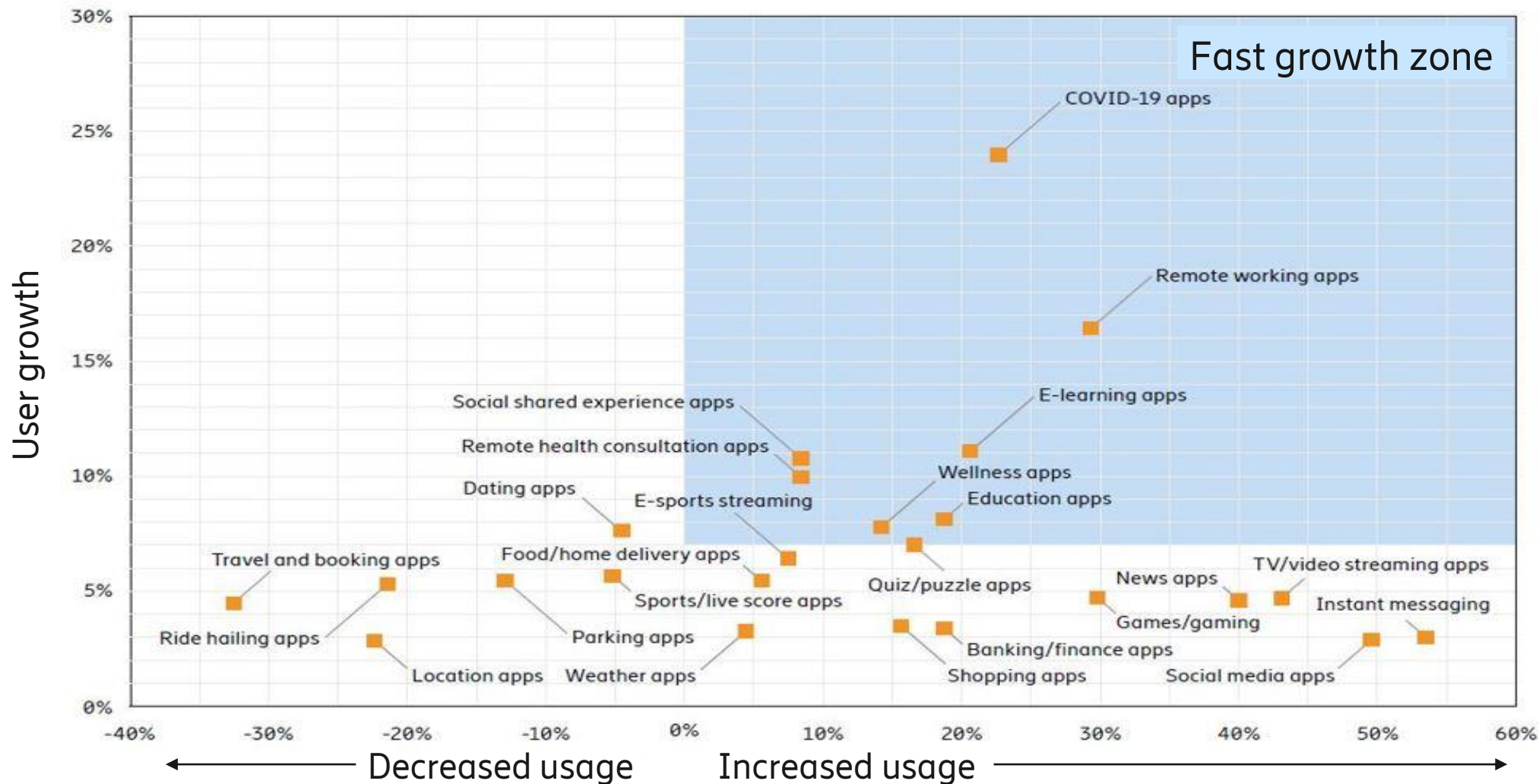

Two weeks before lockdown

Two weeks after lockdown

Source:Ericsson crowdsource data analysis performed with Ericsson Operations Engine

Network traffic impact in effected markets
- Fixed networks: 20-100% traffic increase
  - **Voice over WiFi:** Up to 90% more
- Mobile networks:
  - **Voice**: + 20-70 percent
  - **Data:** - 10 to + 20 percent
- Traffic demand shifted from downtown and public areas to suburban residential areas.
- More consumption of bidirectional apps, such as audio, web and video conferencing, entertainment apps (streaming video,audio), social media and messaging
- Service providers managed to provide sufficient network performance despite changing traffic patterns and increased traffic demand

Consumers digital behaviors - smartphone app usage during COVID-19 lockdown restrictions
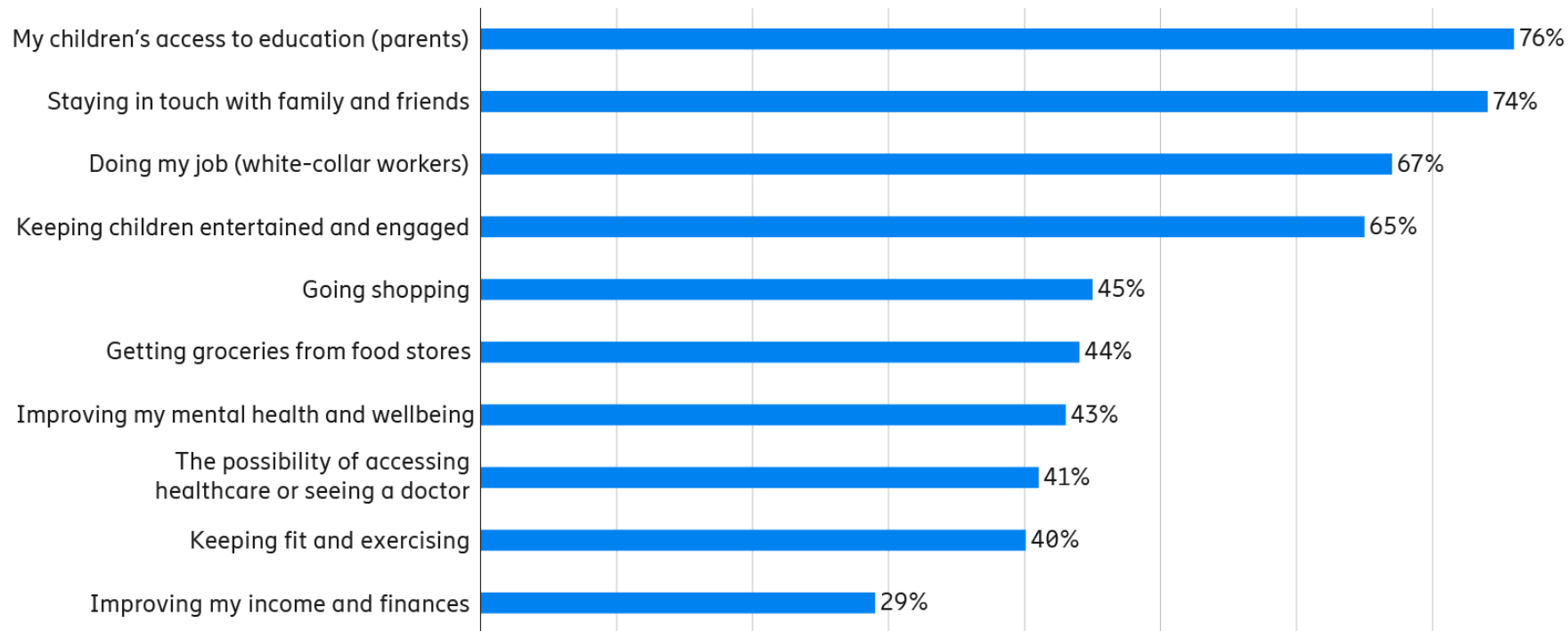
Connected consumers, getting through the crisis
– ICT supportive to everyday life

Share of smartphone users who consider ICT has helped them a lot with different tasks in their daily lives during the COVID-19 pandemic

Task	Percentage
My children's access to education (parents)	76%
Staying in touch with family and friends	74%
Doing my job (white-collar workers)	67%
Keeping children entertained and engaged	65%
Going shopping	45%
Getting groceries from food stores	44%
Improving my mental health and wellbeing	43%
The possibility of accessing healthcare or seeing a doctor	41%
Keeping fit and exercising	40%
Improving my income and finances	29%

Base: Smartphone users aged 15—69 who claim their daily life is highly impacted by the lockdown restrictions, in Brazil, China, France, Germany, India, Italy, South Korea, Spain, Sweden, the UK and the US

83%
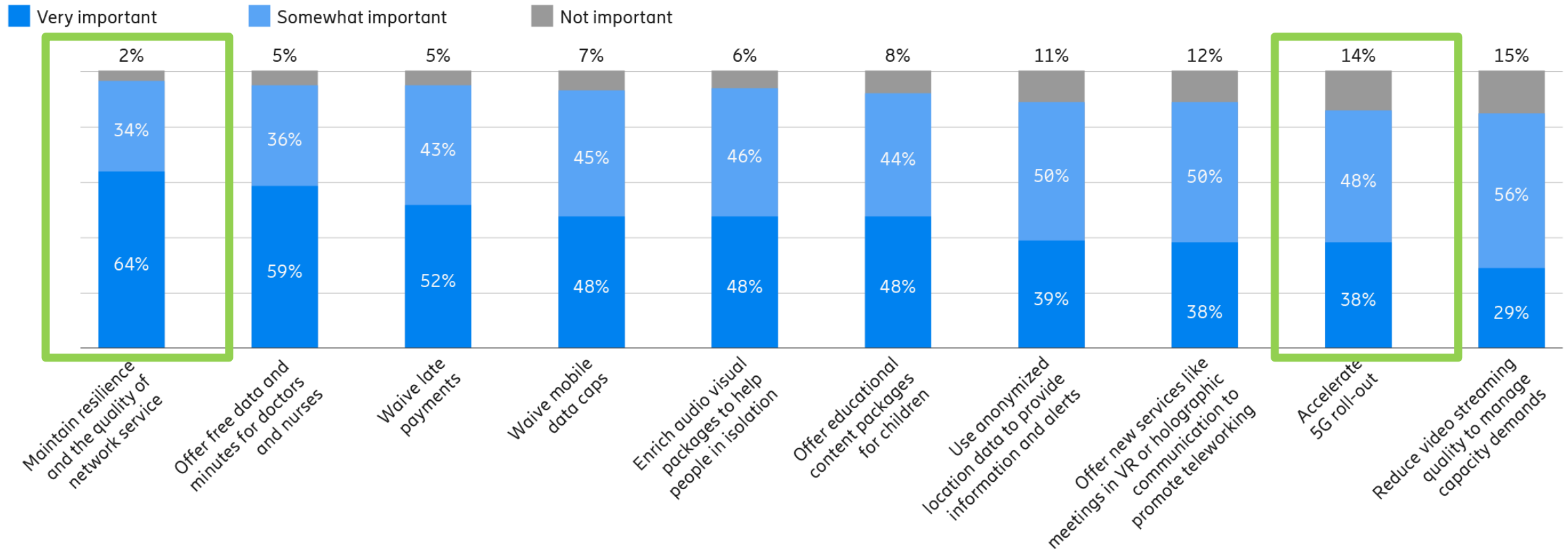
Of the survey respondents, 83 percent claim that ICT helped them a lot, in one way or another, to cope with the lockdown.

Consumer expectations of service providers

Level of importance respondents give to the following service provider actions during the COVID-19 crisis

■ Very important   ■ Somewhat important   ■ Not important

2%	5%	5%	7%	6%	8%	11%	12%	14%	15%
34%	36%	43%	45%	46%	44%	50%	50%	48%	56%
64%	59%	52%	48%	48%	48%	39%	38%	38%	29%

Maintain resilience and the quality of network service — Offer free data and minutes for doctors and nurses — Waive late payments — Waive mobile data caps — Enrich audio visual packages to help people in isolation — Offer educational content packages for children — Use anonymized location data to provide information and alerts — Offer new services like meetings in VR or holographic communication to promote teleworking — Accelerate 5G roll-out — Reduce video streaming quality to manage capacity demands
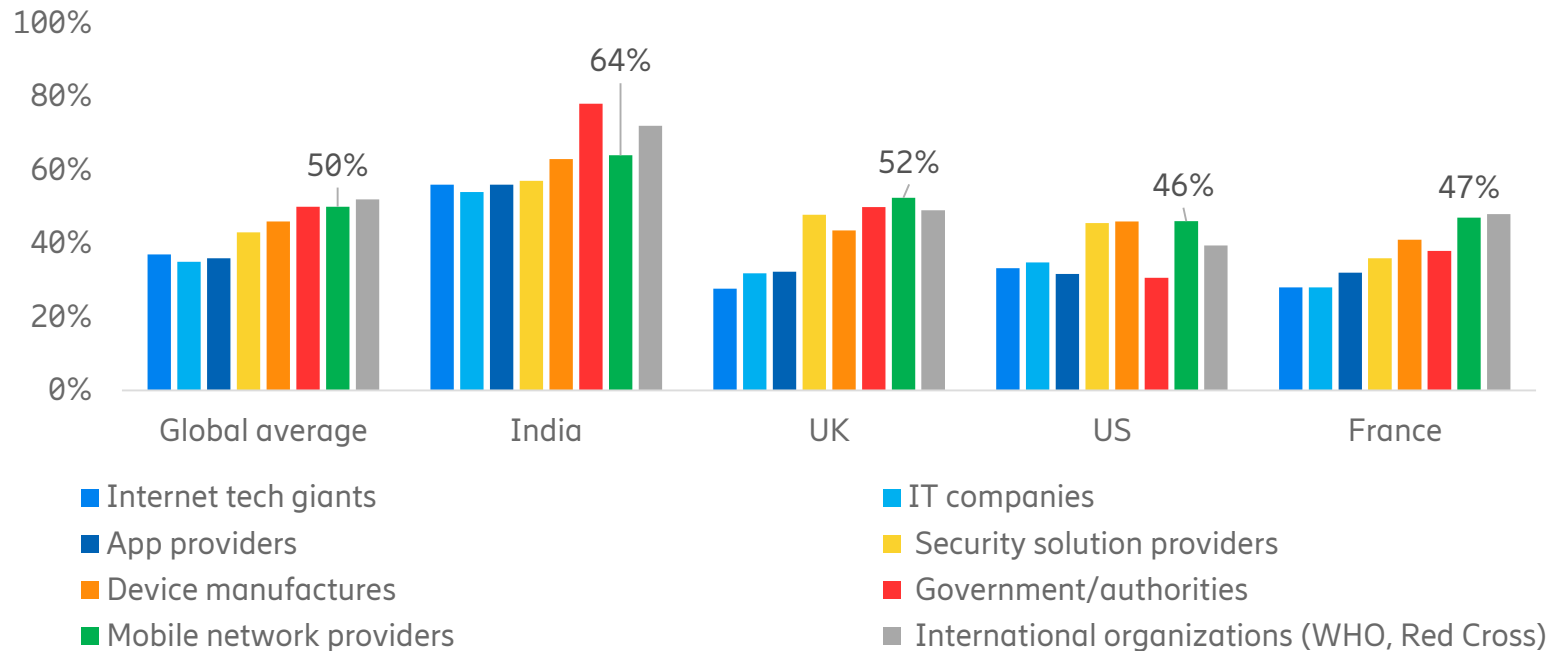
Who do you trust?
Trustworthiness for storing personal data is put to the test

Share who trust the following entities to have access to their personal data (e.g. location) to fight the Coronavirus crisis

Legend:
- ■ Internet tech giants
- ■ App providers
- ■ Device manufactures
- ■ Mobile network providers
- ■ IT companies
- ■ Security solution providers
- ■ Government/authorities
- ■ International organizations (WHO, Red Cross)

Telco's trusted more than internet tech giants for usage of mobility data for "common good"

3 in 10
concerned that governments could continue to use, retain and harvest their personal data even after crisis, while 1 in 4 don't believe that will happen.
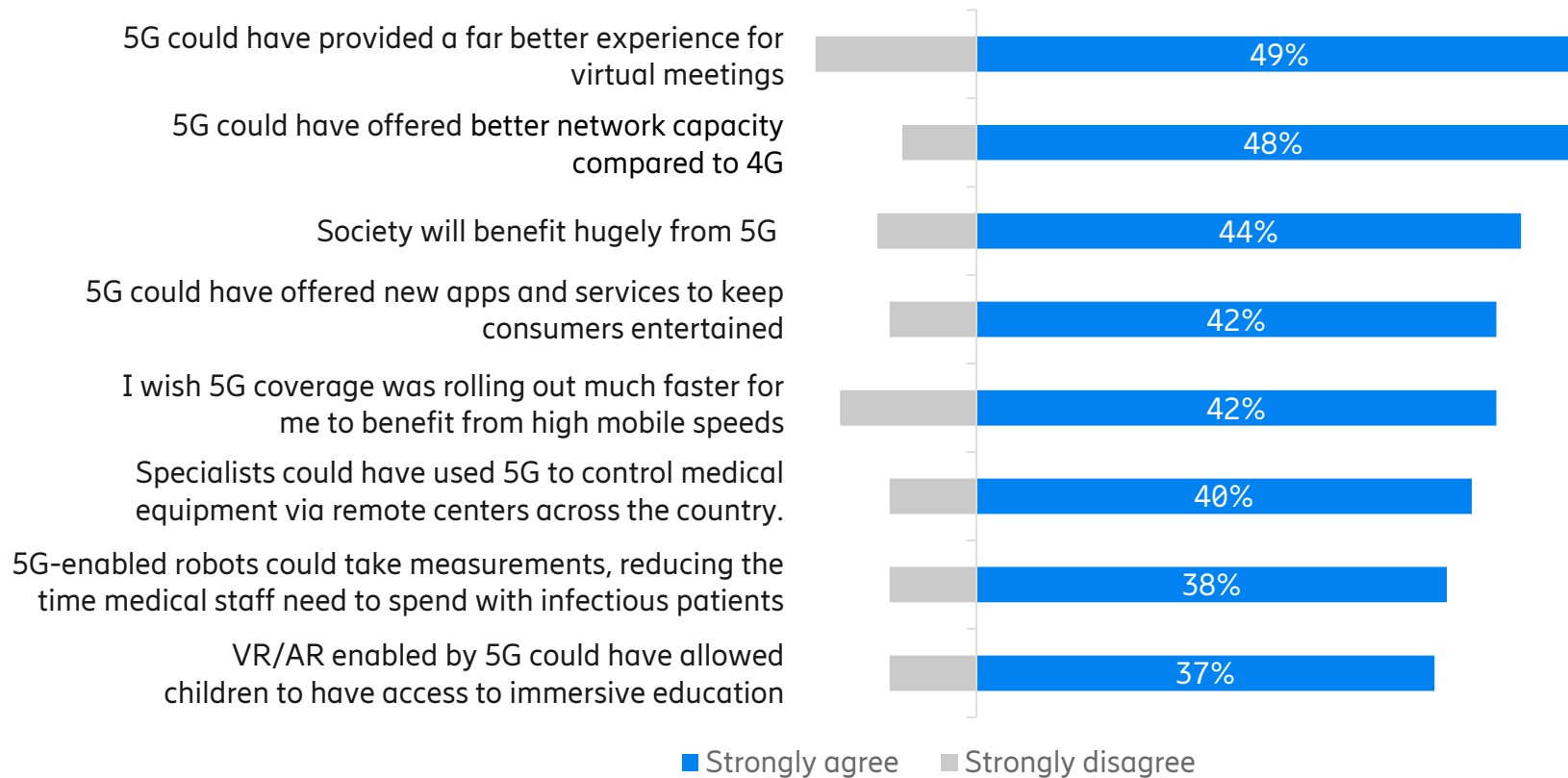
Base: Smartphone users aged 15–69 within Brazil, China, France, Germany, India, Italy, South Korea, Spain, Sweden, UK and US
Source: Ericsson Consumer & IndustryLab, Keeping consumer connected in a COVID-19 context (Mid-April 2020)

What could have been
The positive impact 5G could have had during the crisis

Attitudes towards 5G during Covid-19 crisis

5G could have provided a far better experience for virtual meetings — **49%**

5G could have offered better network capacity compared to 4G — **48%**

Society will benefit hugely from 5G — **44%**

5G could have offered new apps and services to keep consumers entertained — **42%**

I wish 5G coverage was rolling out much faster for me to benefit from high mobile speeds — **42%**

Specialists could have used 5G to control medical equipment via remote centers across the country. — **40%**

5G-enabled robots could take measurements, reducing the time medical staff need to spend with infectious patients — **38%**

VR/AR enabled by 5G could have allowed children to have access to immersive education — **37%**

■ Strongly agree   ■ Strongly disagree

63%
Despite all conspiracy theories are positive towards the role 5G could have played during the crisis.

4 in 10
wish 5G coverage was rolled out faster,
6 in 10 5G early adopter say so.

Changes in behavior likely to transcend into the future
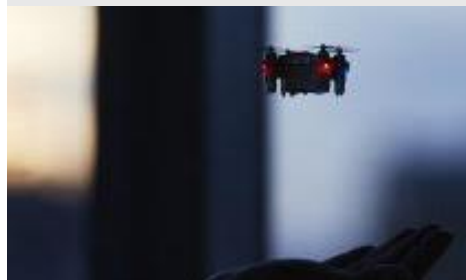# 5 consumer predictions for a post COVID-19 world

Networks Redefined	Autonomous Commerce	Borderless Workplace	Synchronous Care	Virtual Experience Economy
64 % believe it is very important that service providers maintain the resilience and quality of the networks. Not only important now, but also in the future	55% believe automated delivery drones or fleets of driverless cars might replace delivery people.	6 in 10 white collar workerse believe working remotely will be the new normal.	6 in 10 respondents in the US and UK predict that online health-care consultations will become more popular than physical visits to the doctor.	AR and VR applications could evolve into attractive new travel, social or educational service offerings. To give the experiences we want, even in isolation.