



REPORT

The State of 5G

Keysight Survey Reveals Growing 5G Industry Readiness and Customer Excitement

Keysight commissioned Dimensional Research to conduct a survey measuring preparation and attitudes toward 5G deployment across the globe. The results showed very clearly that nearly half of global businesses are already deploying 5G networks, or plan to deploy them within the next 12 months. These findings underscore the pent-up consumer demand for 5G: the technology is here, it is real, and customers want it.

Executive Summary

This research finds that the 5G market is well underway, with about half of all companies evaluating or deploying 5G technologies today. Over half of the companies surveyed will roll out 5G solutions and networks over the next 12 months. This report reveals that customer demand is the top driver for 5G technology. Those surveyed indicated that 5G network coverage and capability will expand and create new business opportunities.

This finding underscores that 5G is not technology for technology's sake – true business needs are pushing the market. For example, financial services, one of the largest industries, ranks third only behind telecommunications and technology industries, in driving the need for 5G.

The 5G market landgrab has begun. First movers offering quality products will have significant advantages, because customers are waiting. Nearly 70% of respondents recognize that product quality requires comprehensive testing.

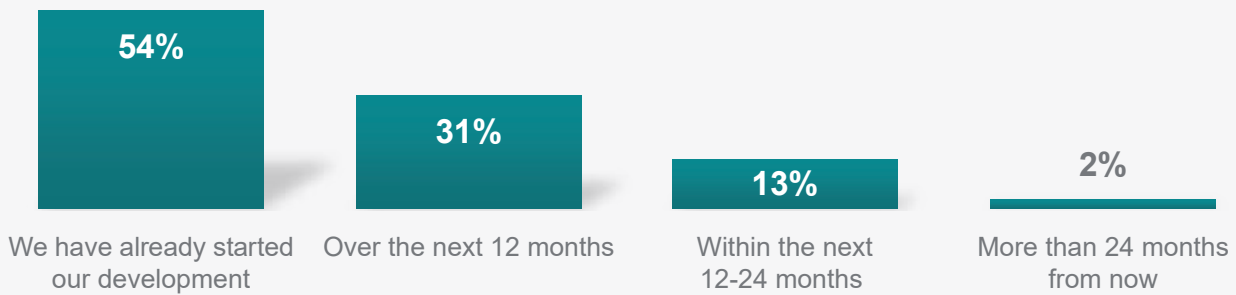


The Results

Overall, Keysight 2018 State of 5G survey results reflect increasing excitement surrounding 5G capabilities as well as rapid momentum around deployment. More than half (54%) of companies have started developing 5G technologies with 16% already partially deployed. And, 46% of respondents said that they are investing in 5G to secure market leadership.

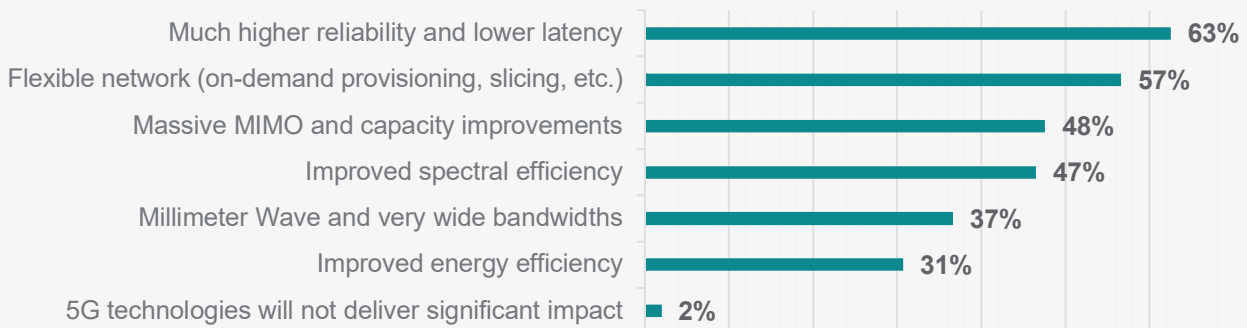
It's important to note that 5G is more than a fantasy. The process of developing standards and infrastructure has made 5G seem like a distant, intangible future.

Approximately when will your company start developing 5G technologies?



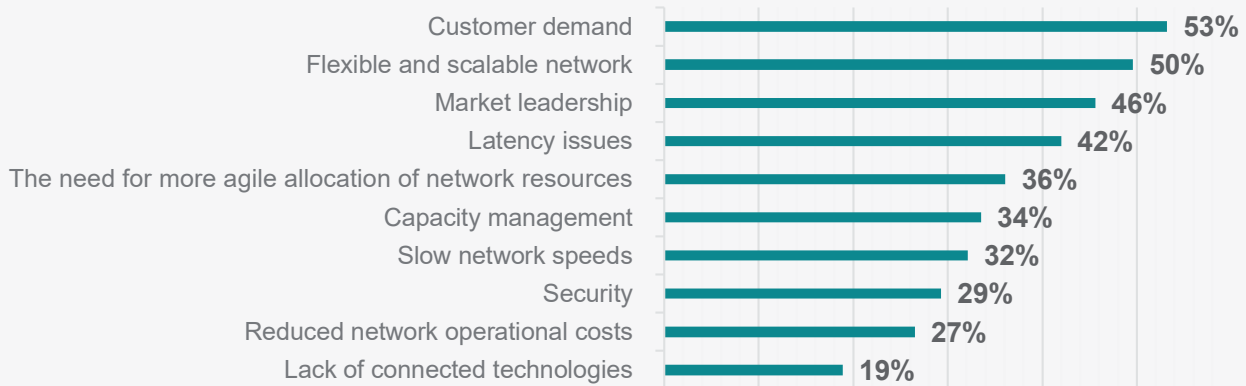
There are Real-world Forces Driving the Adoption of 5G Technology and Networks.

In your experience, which 5G technologies will deliver the most significant impact?



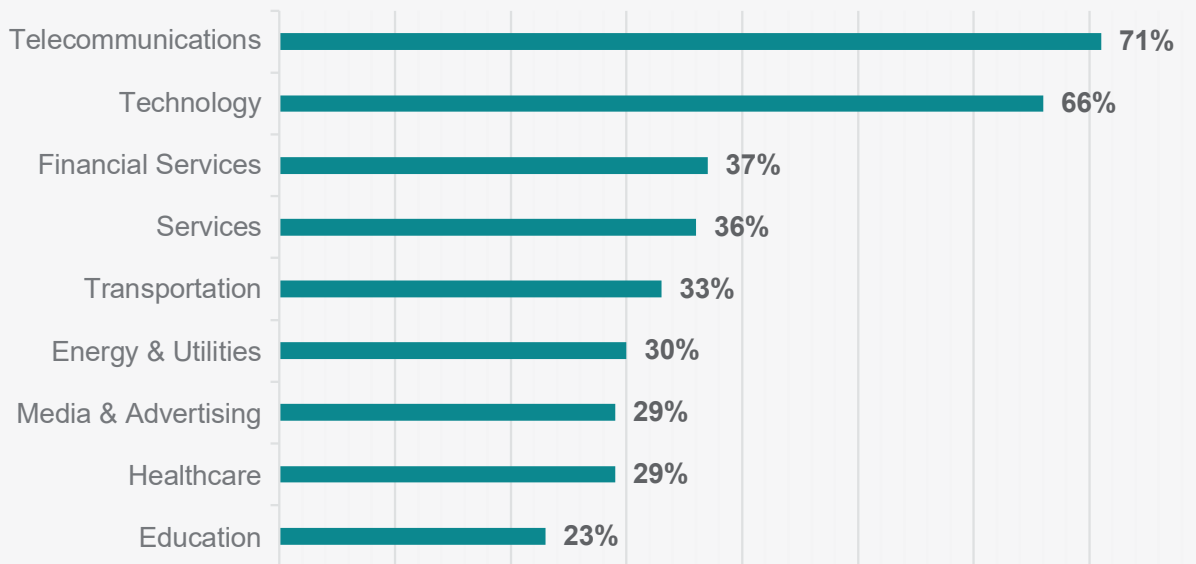
Nearly all (98%) of the survey respondents reported that 5G is going to have significant impact, with the most respondents (63%) pointing to improved Network Reliability and Latency.

What is driving your company's investment in 5G technologies?



The top reason that companies are investing in 5G technologies is Customer Demand (53%), followed by the need for a Flexible and Scalable Network (50%).

The benefits of 5G extend beyond the telecommunications and technology industries—that is, beyond technology for technology's sake—into a wide array of industries.



Most notably Financial Services was one of the industries respondents pointed to as a driver for the need of 5G technology (37%).

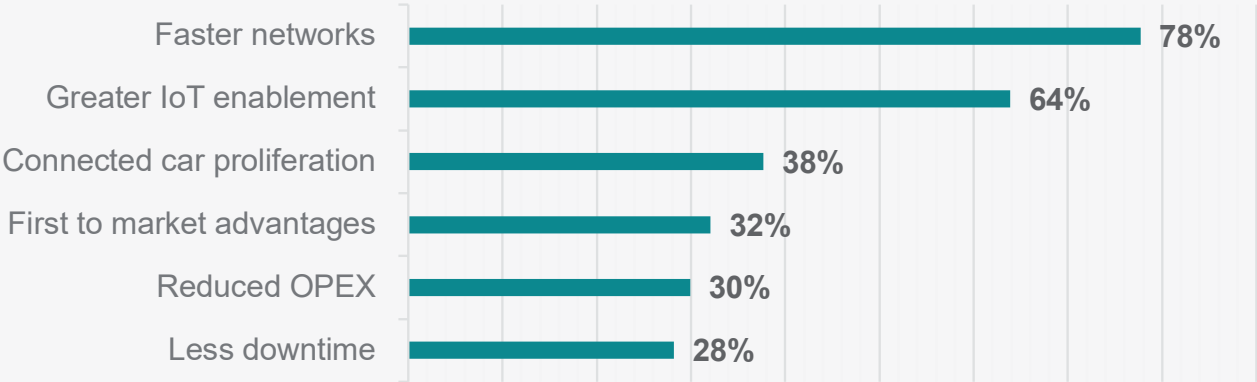
These findings illustrate the many new applications that are only possible in a 5G environment. New opportunities emerging from high speed, low-latency communications have potential to disrupt and transform nearly every industry and create new ones.

But 5G is about more than just the networks that make it up; it is also an enabler for making the most out of technology. When asked what the biggest benefits of 5G would be, most respondents said faster networks (78%).

But the next two highest responses point to enabling new technologies—Greater IoT Enablement (64%) and Connected Car Proliferation (38%).

Because of this growing market need and industry momentum, **more than two thirds (69%) of respondents said they are actively seeking 5G-capable testing solutions to support and accelerate the development or rollout out of 5G technologies.**

What is driving your company’s investment in 5G technologies?



5G raises the stakes to get it right from the beginning. Testing technology in deployment, when businesses and customers are counting on technologies for reliable service that exceeds the limits of 4G, is not the answer. This survey demonstrates that those working across the 5G industry understand what is at stake, and want specific 5G testing equipment, so the industry can fulfill the promise of 5G.

Methodology

Keysight Technologies commissioned Dimensional Research to conduct this survey in the field. A total of 355 senior technology leaders and strategists from service providers and technology companies completed this survey, which aimed to capture hard data on the adoption, deployment, drivers, challenges and benefits of 5G. Senior technology professionals worldwide were invited to participate in a survey on 5G technologies and their companies’ plans for adoption and utilization. The survey was administered electronically, and participants were offered token compensation for their

participation.

About Keysight Technologies

Keysight Technologies, Inc. (NYSE: KEYS) is a leading technology company that helps enterprises, service providers, and governments accelerate innovation to connect and secure the world. Keysight's solutions optimize networks and bring electronic products to market faster and at a lower cost with offerings from design simulation, to prototype validation, to manufacturing test, to optimization in networks and cloud environments. Customers span the worldwide communications ecosystem, aerospace and defense, automotive, energy, semiconductor and general electronics end markets. Keysight generated revenues of \$3.2B in fiscal year 2017. In April 2017, Keysight acquired Ixia, a leader in network test, visibility, and security. More information is available at www.keysight.com.

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