

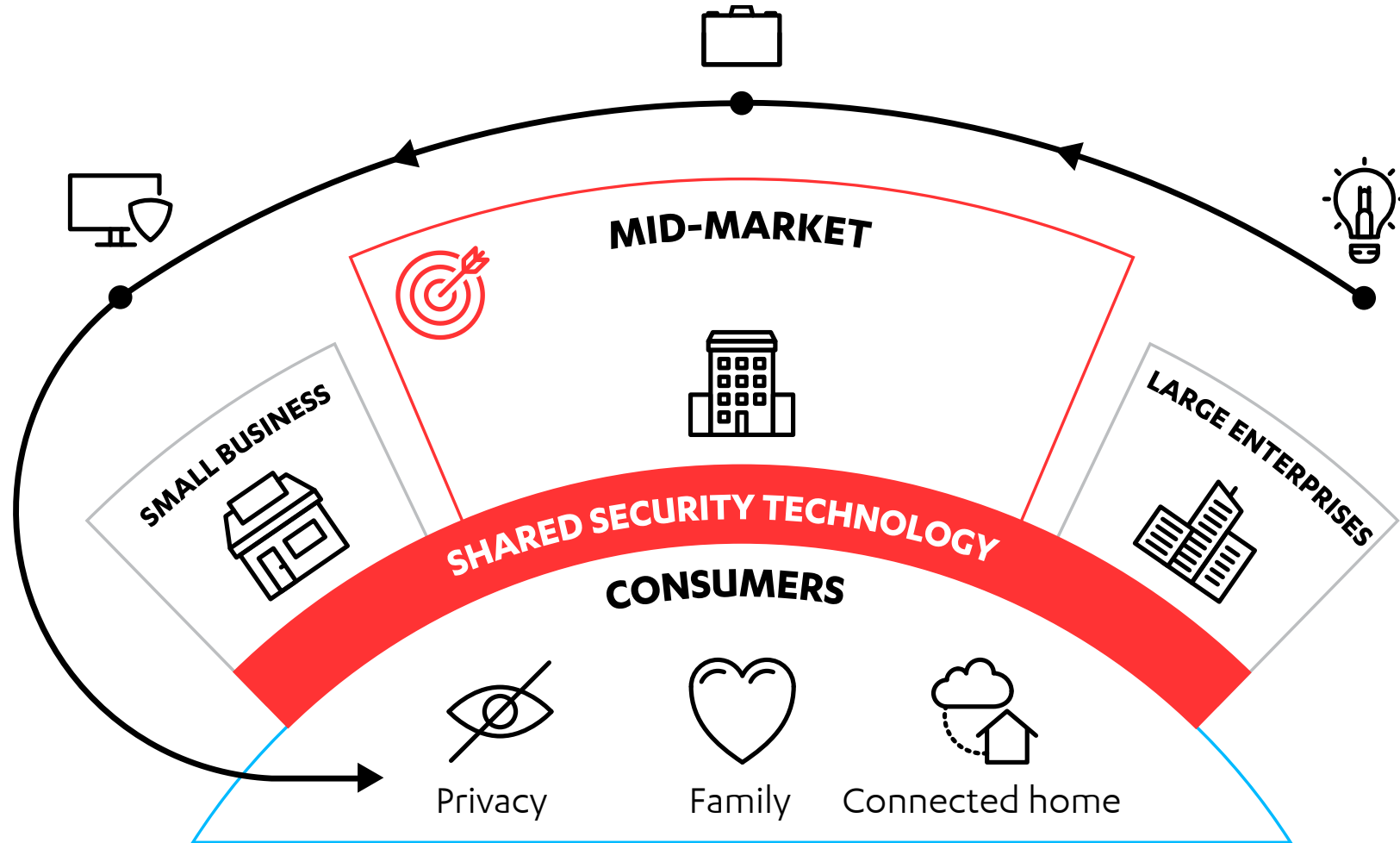
Kristian Järnefelt, EVP, Consumer Cyber Security

CONSUMER SECURITY

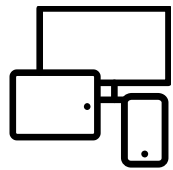
PROFITABLE GROWTH



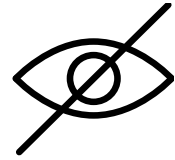
SYNERGIES ACROSS SEGMENTS



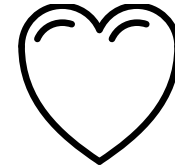
CONSUMERS' SECURITY NEEDS ARE GETTING BROADER



DEVICES



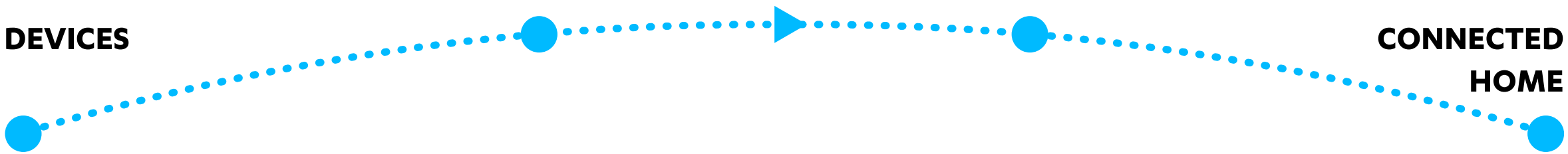
PRIVACY



FAMILY



CONNECTED HOME



Worry about viruses and ransomware

88%

Concerned about online and WiFi privacy

73%

Protecting kids from inappropriate content is important

91%

IoT Gadgets in Use by 2020

> 20B

TRENDS WITH DISTRIBUTION MODELS

Preinstalled devices

Challenged

Retail / eTail

In transition

Operator

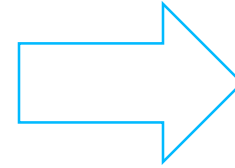
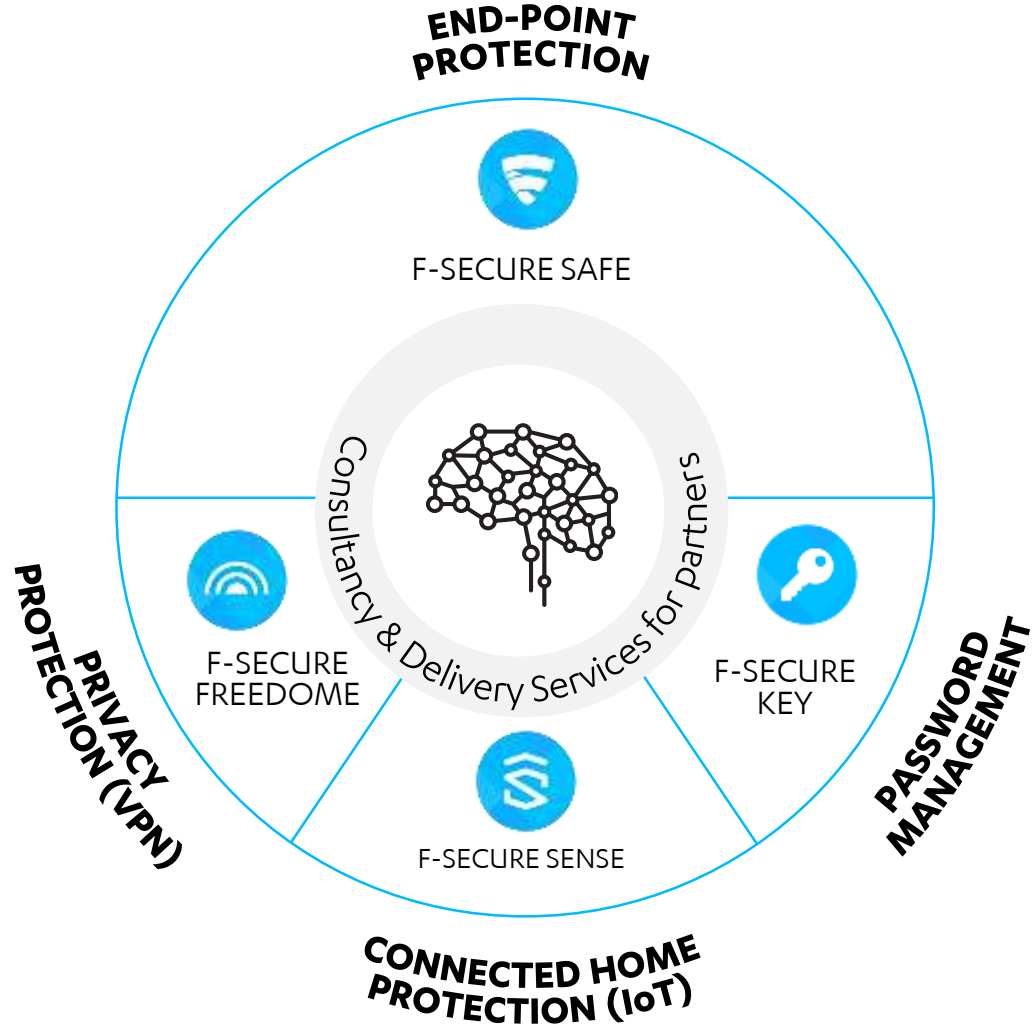
Resilient



Appstores

Growing

PRODUCT PORTFOLIO

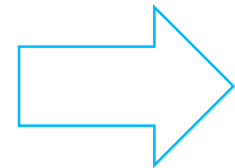


OUR CHANNELS



Telecom Operators

Mobile
ISP
Cable

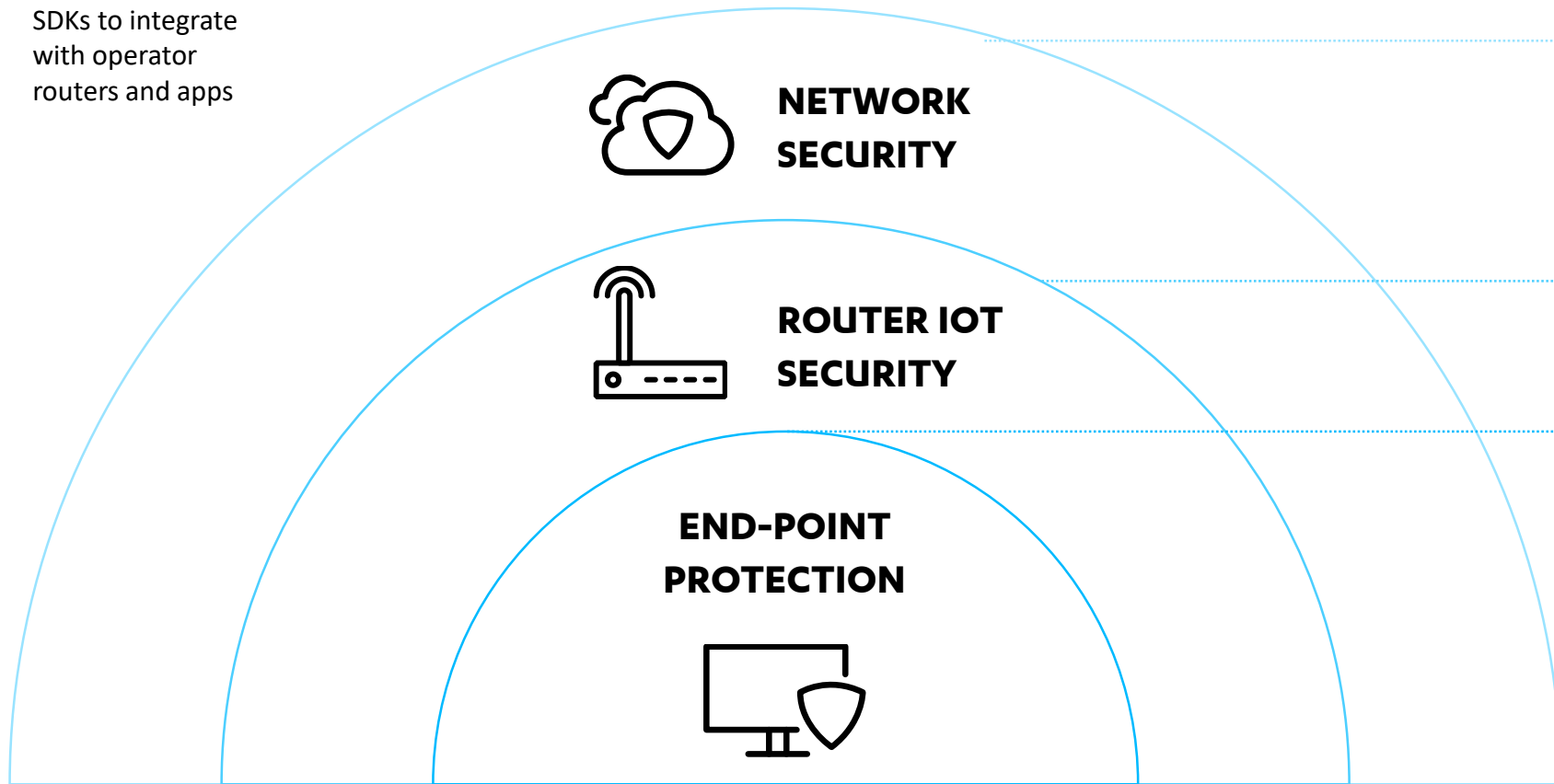


Direct business

eCommerce
Retail & eTail

3-LAYER CYBER SECURITY STRATEGY FOR OPERATORS

* also available as SDKs to integrate with operator routers and apps



Enhance network security by integrating EPP and router security solutions



F-Secure SENSE*



F-Secure FREEDOME*

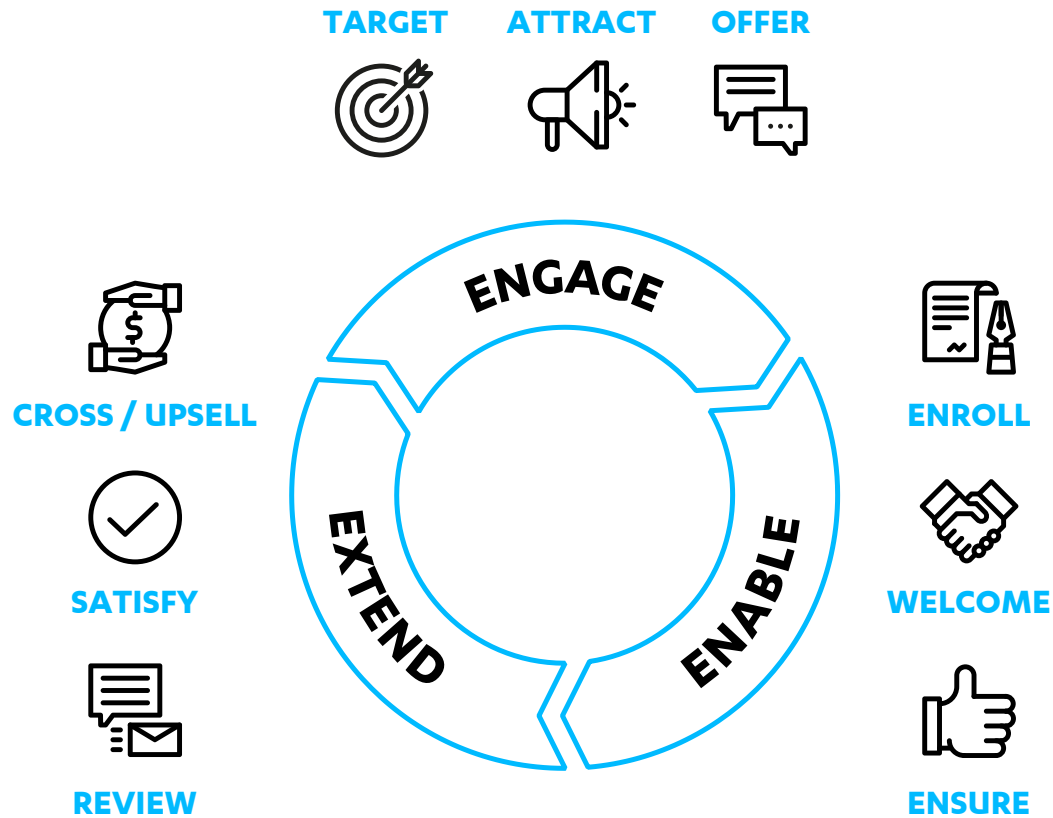


F-Secure SAFE



F-Secure KEY

UNIQUE DIFFERENTIATORS FOR THE OPERATOR MARKET



DRIVING OPERATOR SUCCESS

- Best practices from +200 operators and Direct Business
- Focus in Operators' business outcomes and full customer lifecycle
- Analytics and data driven customer journey optimization

OPTIMIZED FOR OPERATORS

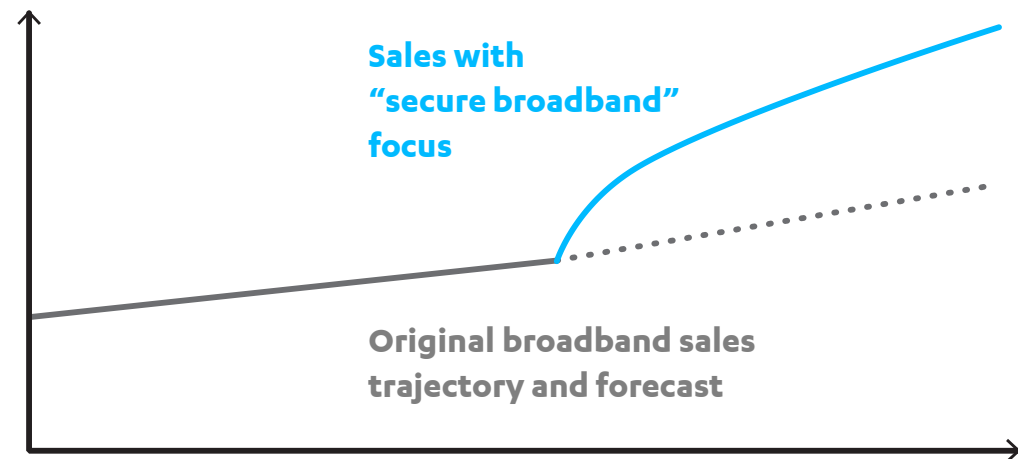
- Support for operator brand strategy through co-branding
- Simplified integration, billing and cloud based business support systems
- 450+ launches provide best budget control and minimized schedule risk

OPERATOR CHANNEL CASE EXAMPLES

GETTING THE PROPOSITION RIGHT

Increasing sales by changing the value proposition

RESULTS



IMPROVING THE CUSTOMER JOURNEY

Using analytics and lifecycle messaging improves activations

RESULTS

40-60%

increase in activations even to large operator

10-15

point increase in their NPS scores

2-3%

Decrease in broadband churn

DIRECT BUSINESS GROWTH ACCELERATED BY FOCUSING ON KEY MARKETS AND CHANNELS

eCommerce

Retail and eTail

Increasing demand
for privacy and
multi-device protection

Cost-efficient
customer acquisition

Improving conversion
and renewal rates

Increasing ARPU with
bundled offerings

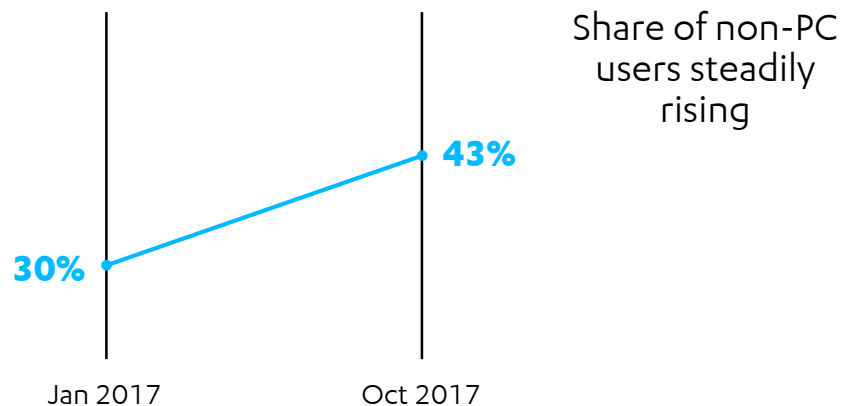
10 quarters of accelerated growth

REAL-LIFE EXAMPLES

GROWTH BY BUNDLING



INCREASING NON-PC USER BASE



F-SECURE SENSE MARKET FEEDBACK

"F-Secure's \$200 SENSE router is like a Swiss Army knife for your home that protects against malware attack. Totally worth it"

Tom's Guide, US

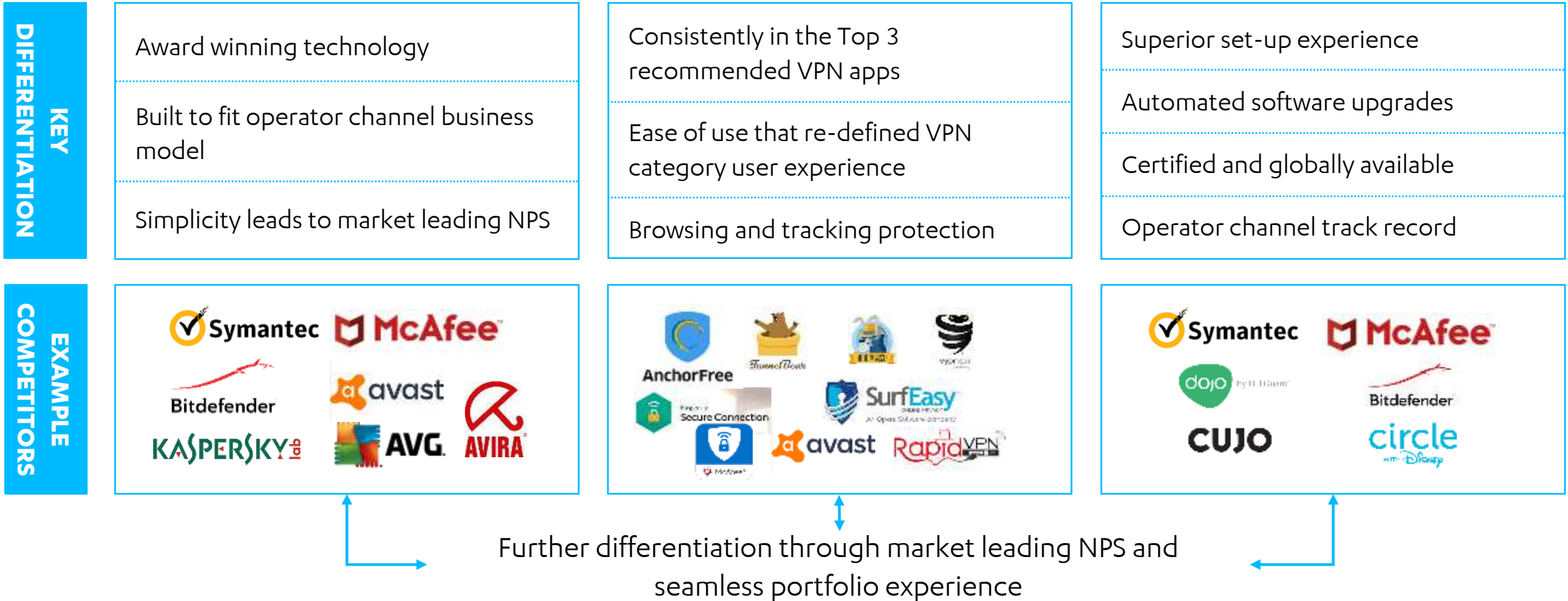
"Overall, SENSE provides peace of mind by offering more security features than most routers"

Cnet.com US

"It's stupidly simple to set up, looks great and most importantly, F-Secure SENSE will make the process of protecting your data and privacy easier"

letstalk-tech.com , UK

WE HAVE A COMPETITIVE PORTFOLIO



FOCUS AREAS IN CONSUMER SECURITY



- Solid performance with healthy profitability
- Increase revenue per user by bundling and upselling
- Offer a seamless portfolio experience
- Capitalize on IoT market opportunity with F-Secure SENSE, including SENSE-as-a-software