F-Secure

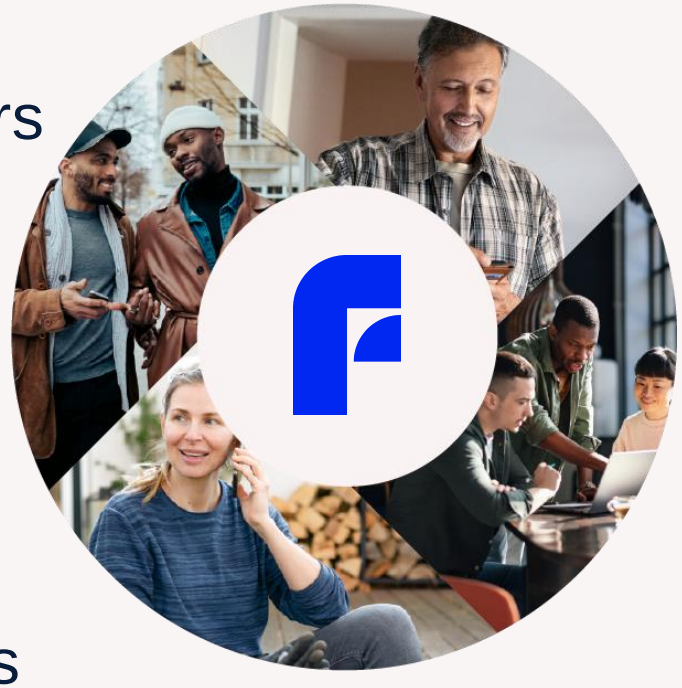
Driving Value with Embedded Security for Broadband Customers

Bill Lott

Head of Embedded Security Marketing

Introductions to F-Secure and Bill Lott

1988
35+ years



~200
Service Provider Partners [1]

>100
countries

56
NPS

20+ years of experience bringing cutting edge technology products to market

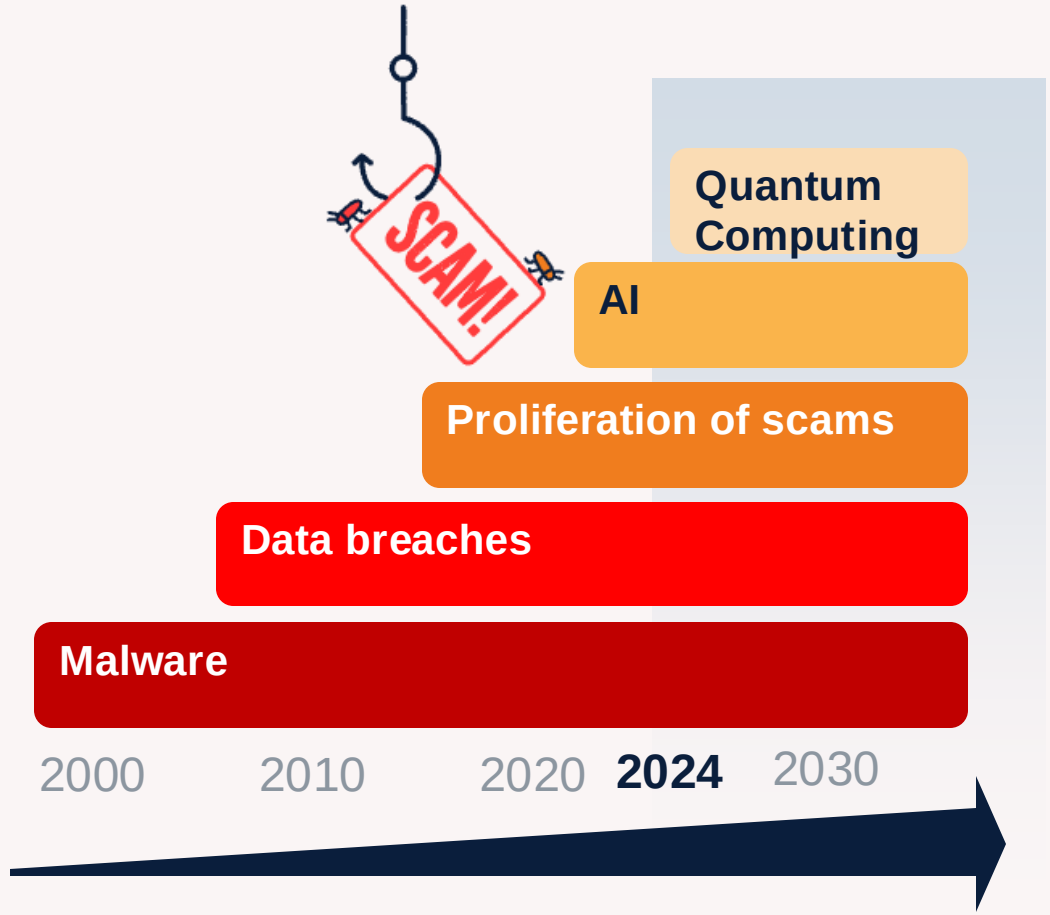
[1] Combined F-Secure and Lookout Life entity starting from June 1, 2023

78% of respondents experienced some form of scam last year

Source: Global Anti-Scam Alliance report 2023 N=49,459 people from 43 countries participated in the Global State of Scams survey

Scams are on the rise

AI fueling scam growth



Large financial losses

$1 Trn
reported lost globally in ’23
(GASA ’23)

7%
of scam victims report the crime to law enforcement
(GASA ’23)

61%
of consumers encounter scams on monthly basis
(F-Secure ’24)

36%
receive scam attempts more now that year ago
(F-Secure ’24)

*Source: GASA Global Anti-Scam Alliance - Global State of Scams survey 2023, n=49,459 people from 43 countries; Global consumer market survey by F-Secure, Jan 2024, N=7000

Consumers seek a trusted companion online

Complexity overload

71% don’t know who to trust online

54% have no idea if their devices are secure

Need for a trusted companion

57% willing for simpler experiences to pay

56% paying for all/some part of their security solutions

Source: Worries: Global consumer market survey by F-Secure, Jan 2024, N=7000,
Global consumer market survey by F-Secure “Connected Home”, Jun 2023, N=4400

Consumer complexity

At home

On the go

Telcos are uniquely positioned

Trusted Provider

64%

of consumers prefer their **internet service provider** to provide cybersecurity

Services via WiFi router

Services via Operator App

Source: Worries: Global consumer market survey by F-Secure, Jan 2024, N=7000,

Embedding security in gateways

12.5 Avg. number of devices per home network

7.8 Avg. number of IoT devices

Cyber Security News

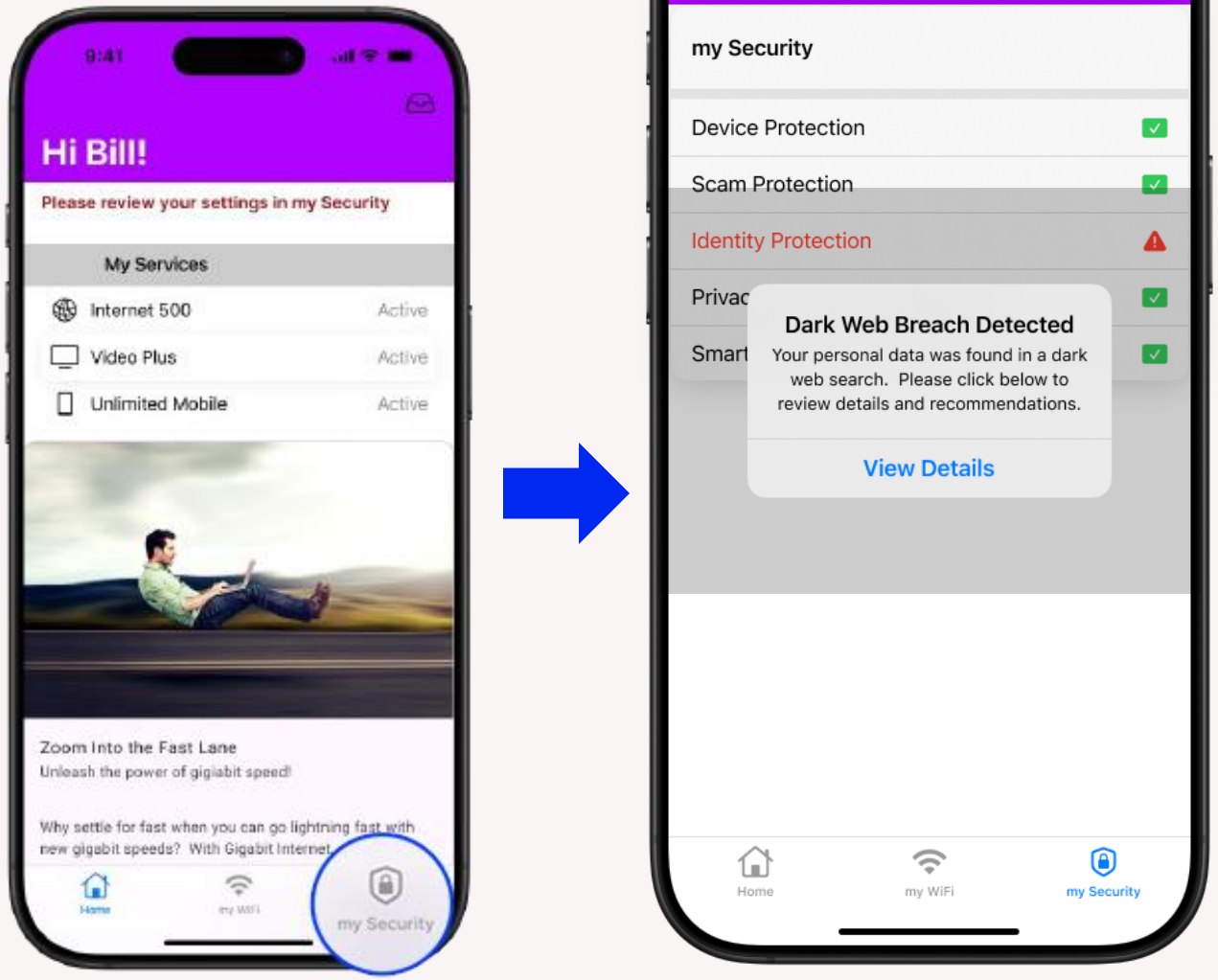
Flax Typhoon's Botnet Actively Exploiting 66 Vulnerabilities In Various Devices

By Varshini Senapathi - September 23, 2024

Embedding security SDK in apps

Why embed security in your mobile app?

- Seamless experience
- App consolidation
- User engagement



Key consumer benefits

Easier protection

+

Comprehensive security

=

Less worry, more peace of mind

Operator benefits

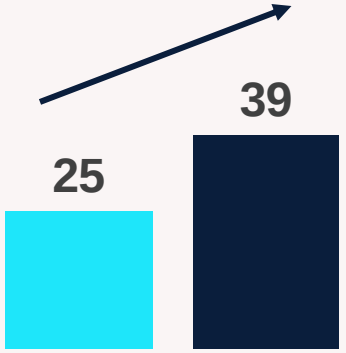
Strengthens brand	**81%** of consumers expect protection
Acquisition lift	**20%** of consumers would consider switching
Revenue lift	**67%** of consumers would pay for device protection **47%** would pay for scam protection
Increased customer engagement	Security features and alerts can drive engagement
Customer Loyalty & Retention	Increases trust, more likely to stay with provider protecting them

Actual operator results

Boost Retention Rates and Gain Trust

Grow and Protect Core Business with Higher Margins

56% higher NPS
(Net Promoter Score)



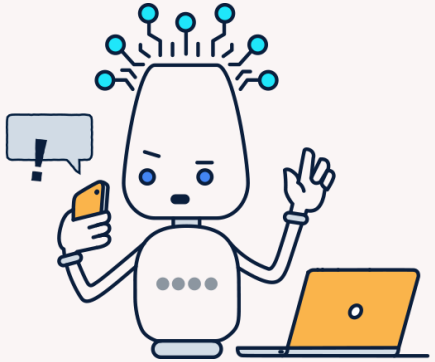
European Service Provider

21% - 60%
Client Churn Decrease

60% - 80%
Typical Margin

Why is security an opportunity for you?

Scams on the rise



- It can worsen with AI tools
- Consumers need protection

Seize the opportunity

- Operators are uniquely positioned
- Majority of consumers see the value

Make it easy

- In the face of complexity, consumers can shut down
- Embedded solutions make protection easier

For more information, visit us at booth A8a

F-Secure®