

A man with a beard is sitting at a dark wooden desk in a modern, bright home office. He is looking at a laptop screen. A large bulldog is sitting on the desk in front of him, leaning its head against his hand. On the desk, there is also a smartphone, a notebook, and a pen. The background shows a white shelf with plants and a window with natural light. A yellow graphic element, a thick line forming a partial frame, is in the upper left corner.

# Are consumers comfortable in the digital home?

Decoding the digital home study 2022

■ ■ ■  
The better the question.  
The better the answer.  
The better the world works.

The EY logo, consisting of the letters 'EY' in a bold, white, sans-serif font, with a yellow triangle pointing upwards to the right of the 'Y'.

**EY**

Building a better working world

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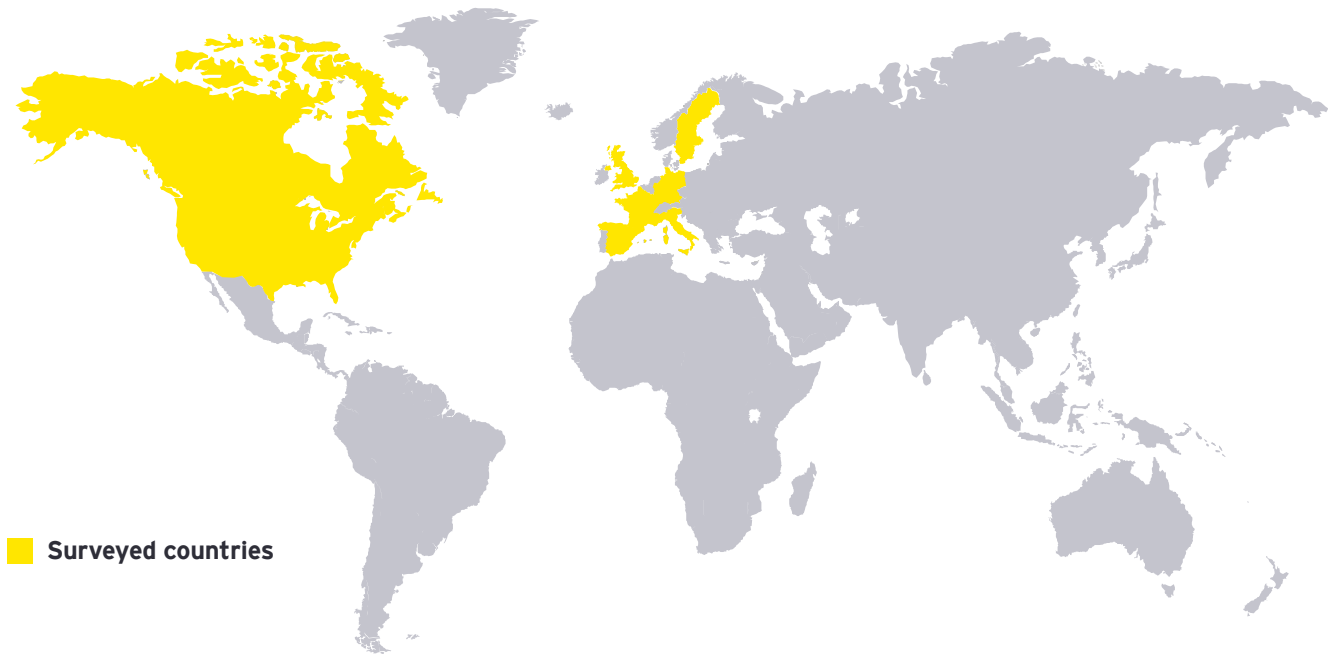
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# About this study



*Decoding the digital home* is based on an online survey conducted for the EY Global Technology, Media & Entertainment, and Telecommunications (TMT) team of more than 20,000 households in Canada, France, Germany, Italy, Spain, Sweden, the UK and the US. The study is produced annually, and this year's research was conducted in February 2022.

The survey is designed to help organizations understand changing consumer attitudes toward technology, media and telecommunications experienced in the home – and the companies that provide these products and services.

Our latest findings focus on topics such as the impact of the COVID-19 pandemic, cost-of-living crisis, online safety, evolving connectivity and content needs, and the customer journey. Additional insights and analysis are provided by the EY Global TMT team.

# What are the key insights?

As we analyzed and evaluated our survey results – across all countries and all digital products and services that we asked households about – several interrelated themes stood out.

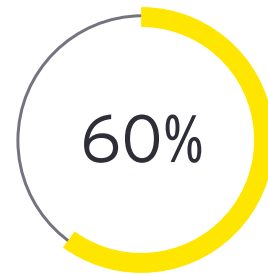
## 1. The digital household in 2022 is demanding and value conscious

Demand for robust connectivity and winning content remain pronounced. More than four in 10 households say their internet connectivity and TV/streaming needs have increased because of the pandemic and interestingly 43% expect these needs to continue. However, the cost-of-living crisis is creating anxiety, with more than half of households concerned that their broadband and TV providers will increase monthly subscription rates, and more than four in 10 concerned that they already pay too much or aren't offered the best deals.

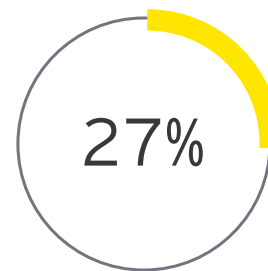
Despite the concern around value, households still want new and better experiences. A total of 37% say that the public health crisis has made them more interested in discovering new digital experiences, with one in four open to the new possibilities of immersive internet experiences such as the metaverse. In addition, as households become increasingly conscious of global sustainability challenges, service providers must consider their green credentials. The survey revealed that 39% of respondents don't think connectivity and content providers are doing enough to address climate change and sustainability.

## 2. Many consumers are looking to downsize their exposure to the online world

While the pandemic has driven up digital connectivity and content needs, many consumers are looking to downsize their exposure to the online world. Our findings show that 34% say they plan to reduce the amount of time they spend online as society returns to normal in the wake of the COVID-19 pandemic, while 33% are planning to transfer spend away from connectivity and content and toward other categories. In addition, more than 20% are interested in reducing the number of music and video streaming platforms they use, as well as the number of connected devices they have in their homes. Interestingly, countries that have seen the greatest uptick in demand since the pandemic – Canada, Italy, the UK and the US – also carry the greatest downsizing risks.



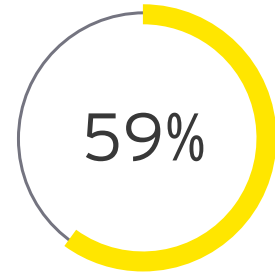
are concerned about their broadband provider increasing the monthly price they pay.



are interested in reducing the number of music and video streaming platforms they use.

### 3. Online wellbeing and harmful content are critical concerns, particularly among younger users

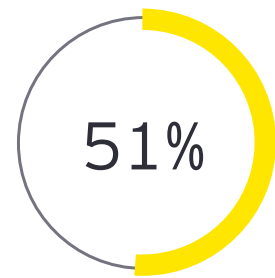
The public health crisis has compounded, rather than alleviated, pre-existing fears around data disclosure, with 40% of consumers saying they are more worried than before about the privacy of their personal data, compared with the 20% who are more comfortable sharing their personal data than before the pandemic. Service providers should also take heed of the wellbeing challenges that are top of mind among younger users as 47% of respondents under 25 often think about the negative impact that using the internet has on their wellbeing. And if they don't, other entities may well intervene to ensure that online experiences are more positive. Our report shows that 59% feel governments and regulators should be doing more to combat harmful content, with 47% agreeing that the internet should be very tightly regulated to restrict what people can access online.



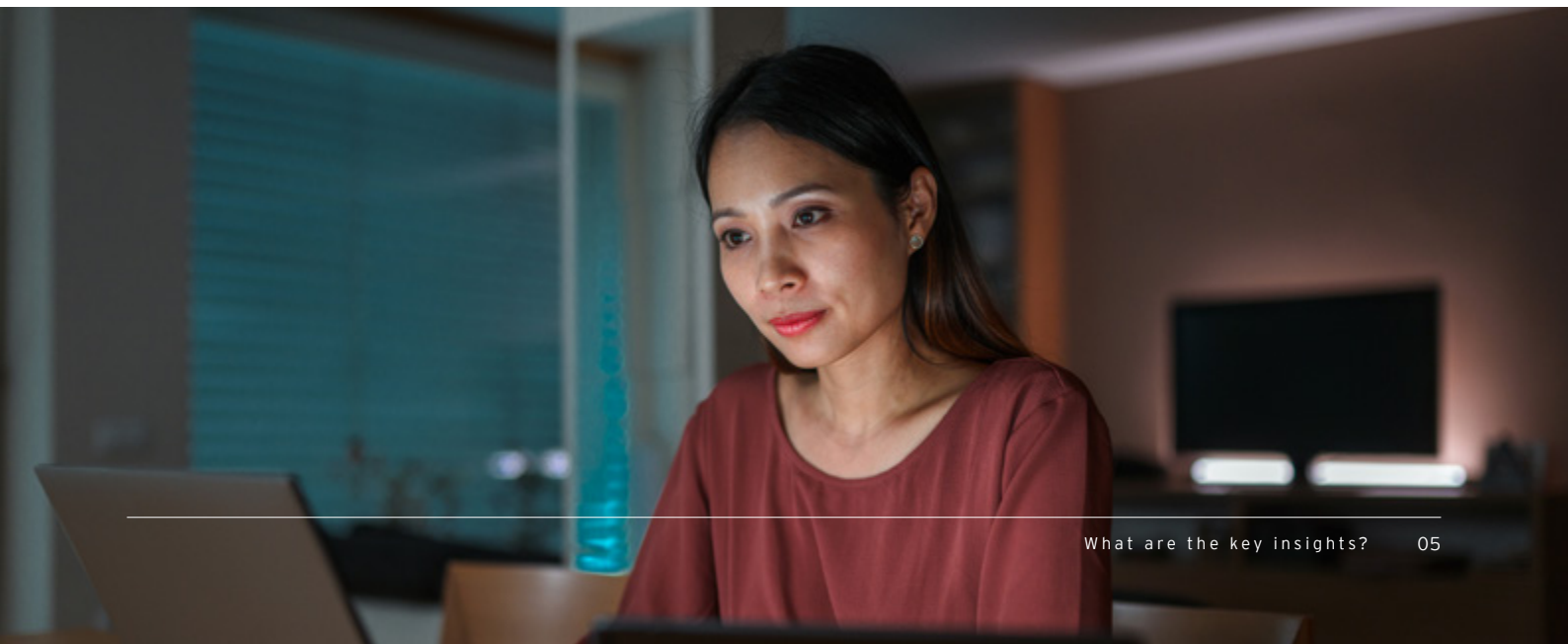
feel governments and regulators should be doing more to combat harmful content.

### 4. Households are looking beyond traditional broadband bundles

Bundles of connectivity and content are a mainstay of how consumers purchase digital experiences for their home. However, their needs here are changing. Half of households would be likely to take additional privacy or security features as part of their broadband package, while one-third would be likely to add services such as smart home, utility services and home working features if available. These enhancements suggest an evolution beyond the more traditional "bolt on" of TV and mobile services. Indeed, a rising proportion of households (29%) say the advantages of buying broadband and TV from the same provider aren't clear to them. Add to this households' willingness to swap a fixed broadband for a mobile broadband connection and it's clear that consumers' vision of the ideal package is evolving in new directions.



would be likely to take a broadband package that includes additional privacy or security features in the future.





## 5. Competition is intensifying as users consider service providers' trust and value credentials

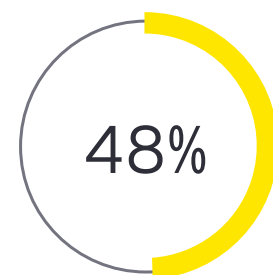
A wide array of product and service providers are competing for share of household wallet at a time when consumer spending is under pressure. Our survey shows that attitudes toward different types of service providers vary by age and country. Overall, broadband and utility providers score well as perceived data custodians, yet their lead evaporates in younger groups – with mobile operators and streaming TV platform providers the most trusted among users under 25. Households' value-for-money perceptions also vary significantly at the country level. Streaming platforms generally enjoy an advantage over pay TV providers, yet this advantage is narrowest in France and Spain. Meanwhile, broadband and mobile providers tend to outscore content providers on value for money – but this is not the case in Canada or the US. These differences underline just how important local market perceptions are, now and going forward.

## 6. Complexity, confusion and limited confidence create painful customer journeys

As service providers consider how best to meet changing needs, positive customer interactions are critical. Yet relationships with customers are not all they could be. Consumers struggle to make effective choices, with complex and undifferentiated value propositions a pain point for one-third of households. Even introductory offers produce mixed results: Over half (53%) say these offers play a role in their supplier choices, but nearly as many say they make it difficult to work out who offers the best value. Installing and configuring services – whether broadband, TV apps or smart home – are also a headache, with younger customers more exposed. And when consumers buy services or seek support, many shy away from digital channels. It's shown that 42% go to a physical store to purchase a mobile plan, and that more than half prefer to use call centers for broadband support. A lack of confidence and understanding informs the need to speak to call center agents and store assistants, which stands in the way of greater use of self-service.

Most trusted service providers to safeguard personal data:

1. Utility company
2. Broadband provider
3. Mobile operator
4. Smartphone manufacturer
5. Streaming TV provider



believe introductory offers make it difficult to work out which broadband package represents the best value.

# 1

Detailed survey findings

## The search for value in a volatile world

# The digital home during uncertain times

The findings to this year's digital home report are contextualized within the landscape of a receding pandemic. They're also set in a time when the cost of living is rising rapidly, creating significant pressure on household spending. This makes for some interesting outcomes. For instance, digital needs have risen. But on the other hand, there's an increased willingness shown by consumers to downsize their digital world. Additionally, many households worry that they overpay for content and connectivity, and fear further price hikes going forward. Providers must therefore reassure customers in a time of heightened uncertainty.

## Digital demand has risen because of the pandemic, with many households receptive to new experiences

The survey reveals that 37% of household respondents have become more interested in discovering new digital experiences as a result of the pandemic, with 26% signaling interest in immersive internet experiences such as the metaverse. This receptivity is most pronounced in younger households and in countries such as Italy (47%), Spain (44%) and the US (44%).

Figure 1: Pandemic impact on demand for connectivity and content

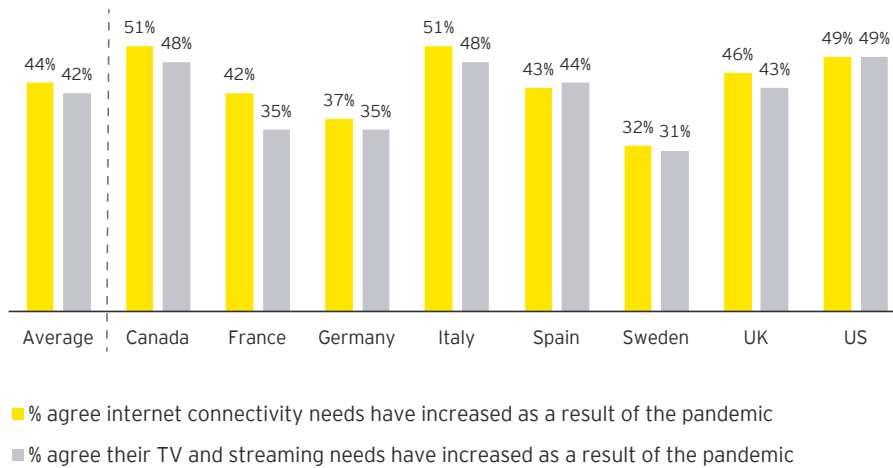
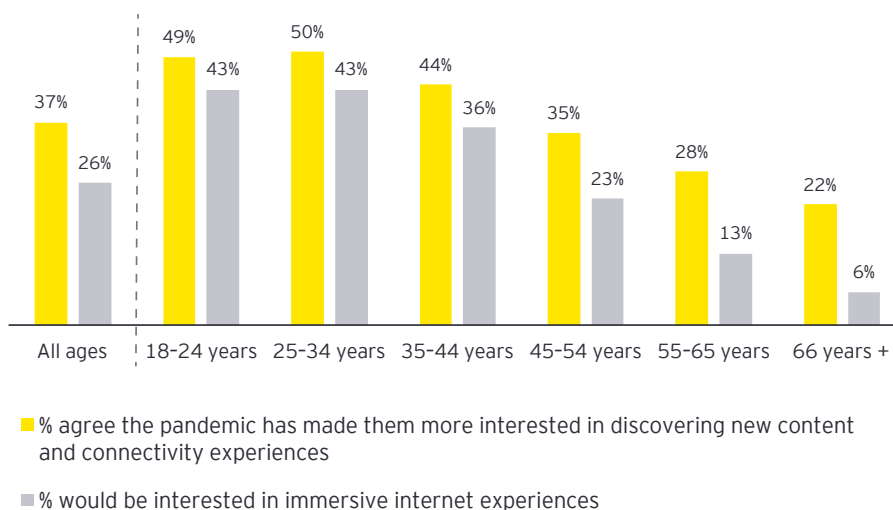


Figure 2: Consumer receptivity to new digital experiences

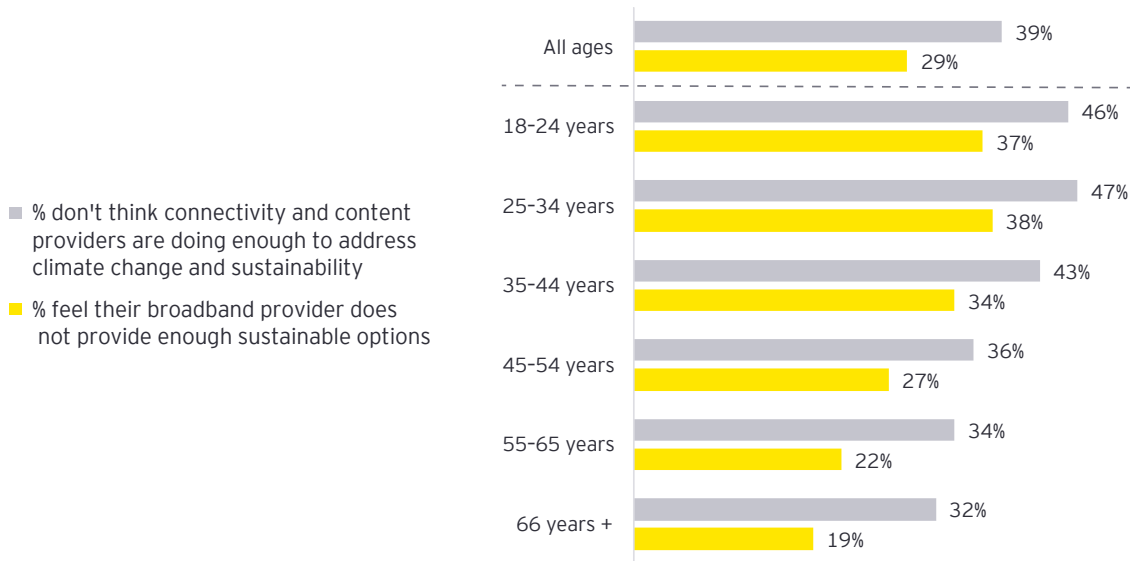




## Sustainable principles are shaping the digital home, and consumers want more action from service providers

Sustainable principles now shape consumers' relationships with technology, connectivity and content. For instance, 29% don't think connectivity and content providers offer enough sustainable options within their packaging, and 39% don't think service providers are doing enough to address climate change and sustainability at large. Service providers with effective sustainability programs stand to benefit: Over one-third of households are prepared to pay more for sustainable products.

Figure 3: Consumer attitudes toward service providers' sustainable practices



Over one-third of households are prepared to pay more for sustainable products.



## The cost-of-living crisis is putting households under pressure

Many households already show concern that their service provider doesn't do enough to put them on the best value deal, with broadband customers more sensitive than mobile users on average. A rising proportion of households (45%) also fear that they pay too much for content they don't watch. Additionally, over half of households are concerned that their broadband, streaming or pay TV providers will increase monthly subscription prices at a time of high pressure on household spending. These concerns are common across both North America and Europe – although German and Swedish households are less likely to signal anxiety compared with households in other countries.

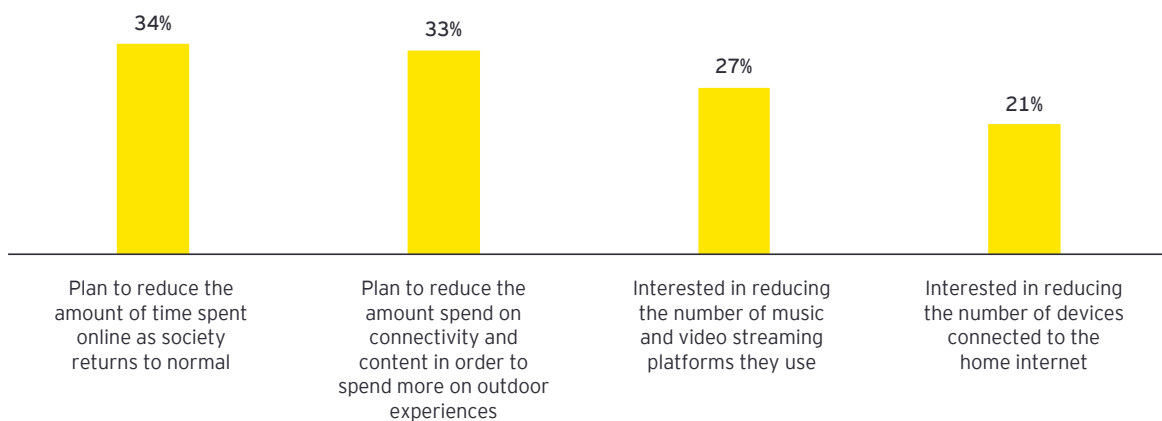
Figure 4: Household concern over price increases



## Although pandemic habits will persist, one in three homes are open to downsizing their digital world

As society readjusts after years of lockdown periods and restricted mobility, consumers are weighing their needs going forward. Encouragingly for service providers, 43% agree that the connectivity and content needs they formed during the pandemic are continuing – with fewer than one in five disagreeing this is the case. However, a substantial portion of households are open to downsizing their exposure to the digital world – whether in terms of spending less time online or shifting spend away from connectivity and content toward outdoor leisure experiences. More than one in four are interested in reducing the number of streaming platforms they use, while one in five would be open to reducing the number of connected devices they have in their home.

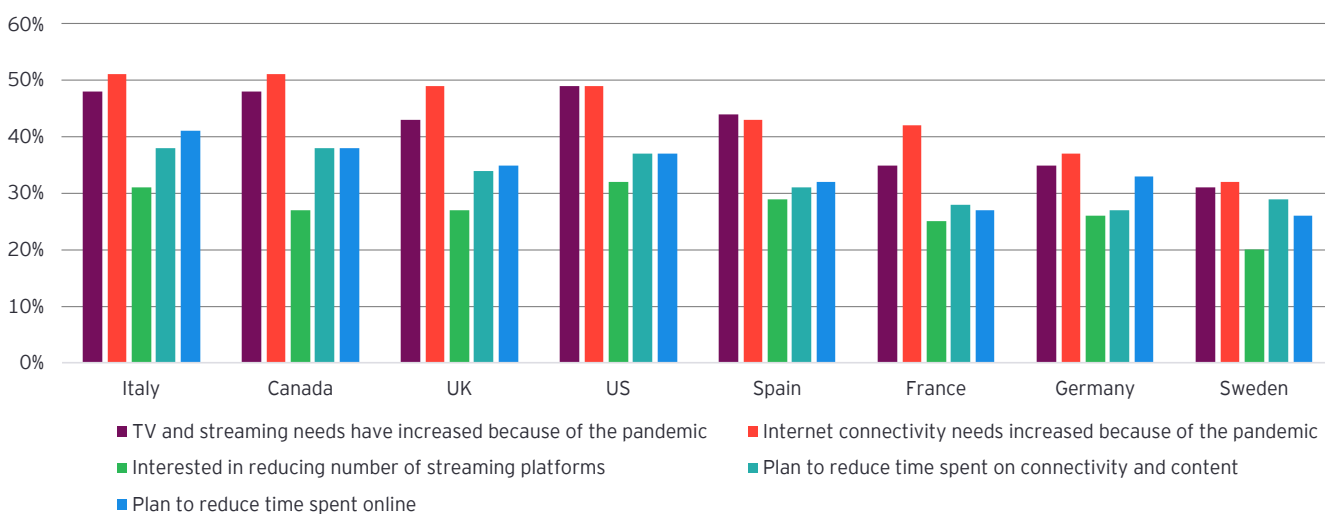
Figure 5: Household willingness to reduce exposure to digital and online



## The volatility challenge: Countries with higher levels of demand tend to carry higher downsizing risks

When considering how consumer needs have evolved since the pandemic began, some interesting trends emerge at the country level. Households in countries reporting the greatest increase in demand during the public health crisis evidence the greatest interest in reducing time spent online and reducing or concentrating digital spending. This positive correlation between increased demand and greater interest in downsizing underlines that consumer attitudes are inherently volatile. Service providers should take note of these complex demand-side forces, understanding that increased appetite for digital is not necessarily permanent – and that converting demanding consumers into satisfied and loyal customers remains challenging.

Figure 6: Pandemic and post-pandemic perspectives on digital needs



# 2

Detailed survey findings

## Online security and safety in focus

# Drivers and inhibitors of digital trust

Our findings show that many fears around how data is stored, treated and protected are common across all age groups. Meanwhile, concerns around digital wellbeing are elevated among younger groups, and more than half of households want government and regulators to do more to tackle harmful content online.

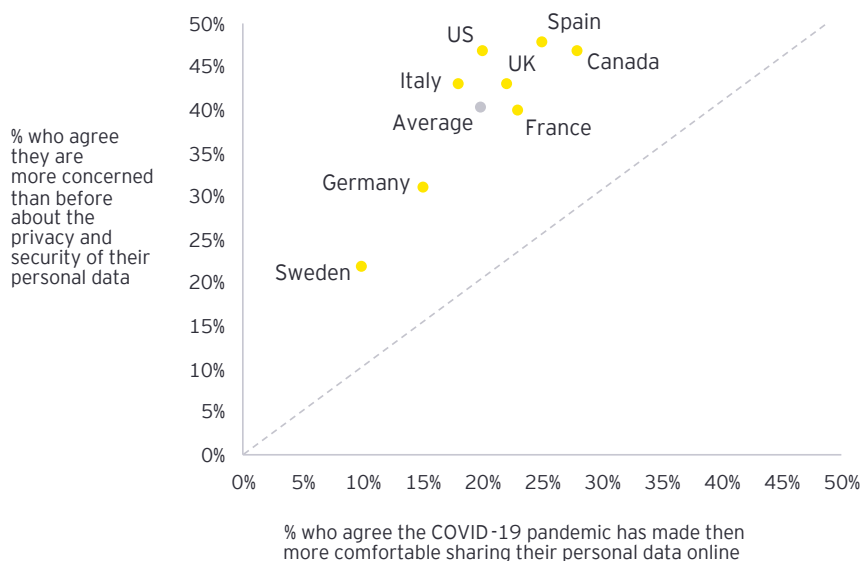
Taken together, these responses suggest online safety and data integrity are a critical challenge facing all consumers. Broadband and utility providers tend to score higher than other service providers as trusted data custodians but lack this advantage among younger groups.

## The pandemic has created more anxiety rather than greater comfort around data sharing

More than two-thirds of households on average, across all markets, report being very cautious about disclosing personal or financial data online – even if it is to a website or brand that they know or trust. The pandemic has exacerbated these fears for many: 40% of households on average say they are more concerned than before about the privacy and security of their personal data, and only with 20% say they are more comfortable sharing their personal data because of the pandemic.

In some markets, such as Sweden and Germany, lower levels of anxiety about data privacy are reported. But interestingly – and perhaps counterintuitively – this is not translating into greater levels of comfort around data sharing.

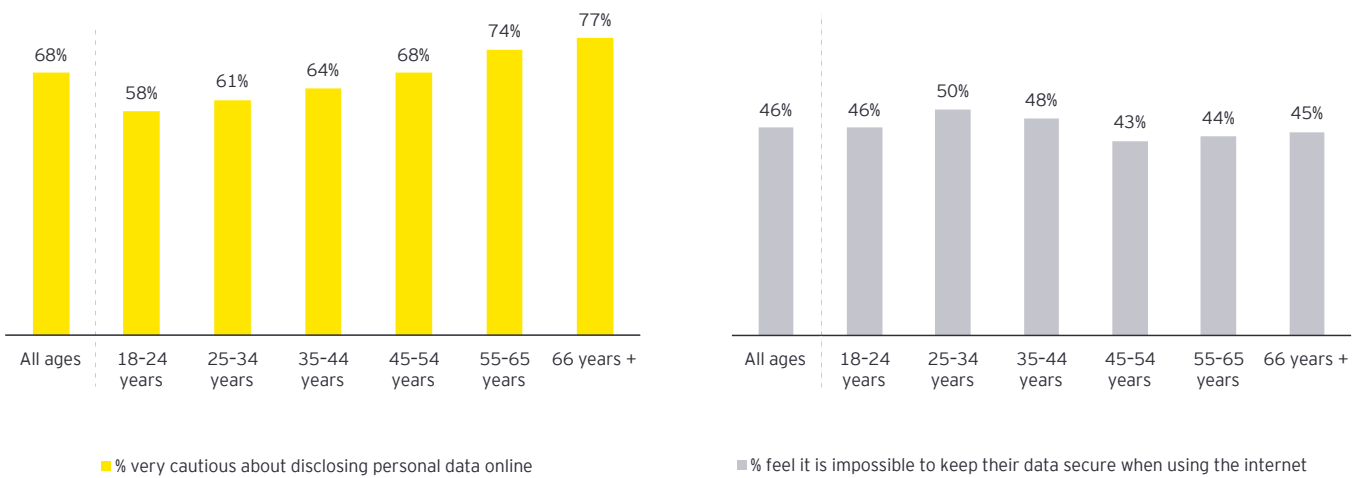
Figure 7: Data privacy and disclosure attitudes: the pandemic effect



## Older groups are more cautious about data disclosure, but other signs of anxiety are consistent across age groups

Considering attitudes toward personal data, it is clear that older groups are significantly more cautious about disclosing personal data online compared with younger groups. However, other attitudes relating to personal data anxiety are more evenly shared across age groups, such as lack of understanding of how companies use and reuse their personal data. Moreover, nearly the same percentage of 18- to 24-year-olds (46%) as users ages 66 and above (45%) feel that it is impossible to keep personal data secure while using the internet. The consistency of such attitudes underlines that data privacy and security are a source of uncertainty for all users, regardless of age.

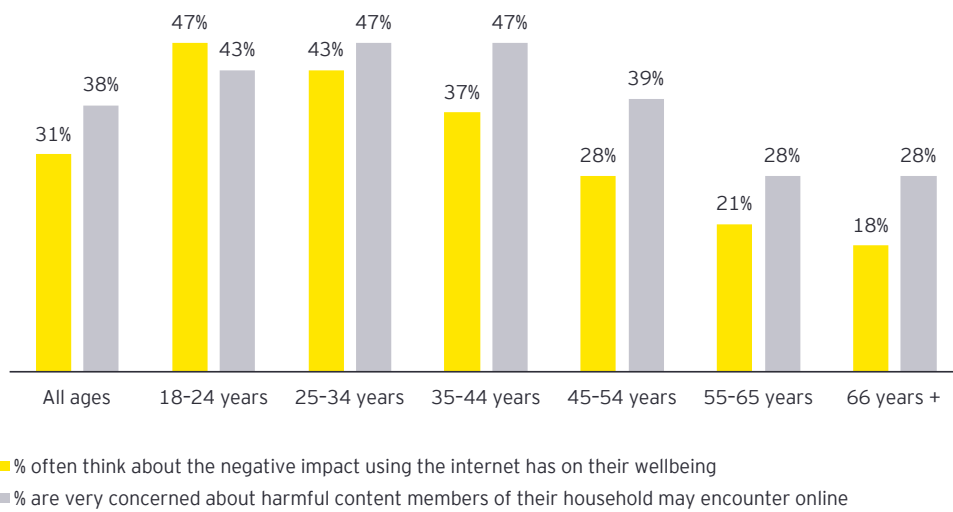
Figure 8: Household attitudes toward personal data disclosure and control



## Digital wellbeing and harmful content are top of mind for younger users

Beyond issues of data privacy and security, consumers are sensitive to how the online world affects their overall sense of wellbeing. Around one-third report often thinking about the negative impact of the internet on their wellbeing, and this rises to almost half of 18- to 24-year-olds. Concern about harmful content is also pronounced, with 38% worried about the content members of their household may encounter online. Consumers want positive action to be taken: Our findings show that 59% of households feel governments and regulators should be doing more to combat harmful content online and 47% favor a tightening of regulation to enable restrictions on content. However, sentiments diverge at the country level: For example, 69% of French households favor a highly regulated online environment, compared with 31% of Swedish households.

Figure 9: Household attitudes to online wellbeing and safety



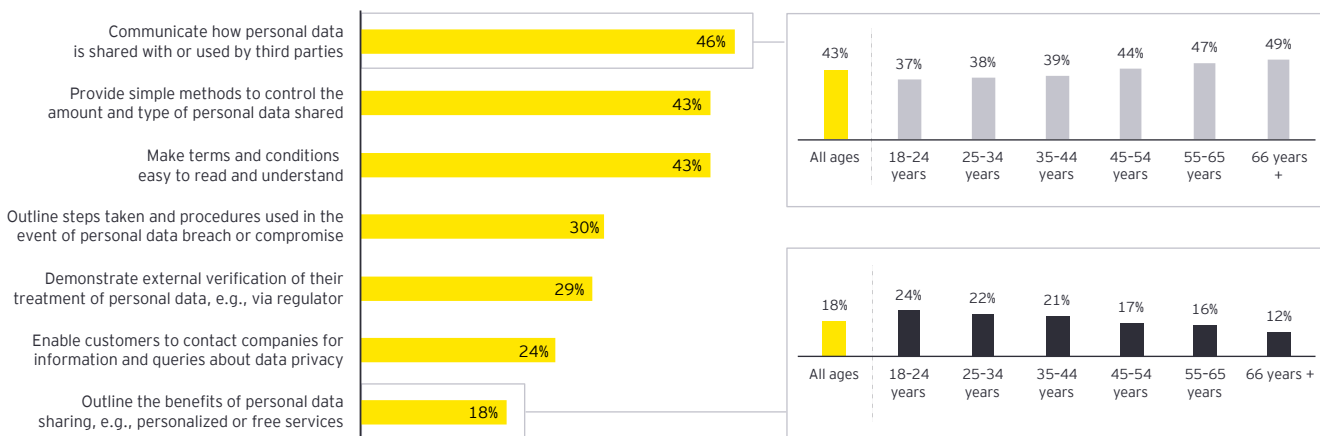


## Greater control, clearer understanding and better communication are drivers of comfort around data sharing

When asked what service providers should do to create more comfortable conditions for sharing of personal data, consumers cite a range of actions. Better communication on how data is used with other parties leads the way (46%), and more than four in 10 users would also like simple methods to control the amount of data shared alongside easy-to-understand terms and conditions. Older groups tend to over-index for these leading answers. Other actions tend to resonate more with younger users: 18- to 24-year-olds are twice as likely as users ages 66 and above want to hear more about the benefits of data sharing in terms of access to personalized or free services.

Figure 10: Drivers of more comfortable data sharing

**Which of the following actions should companies take to make you feel more comfortable sharing your personal data?**



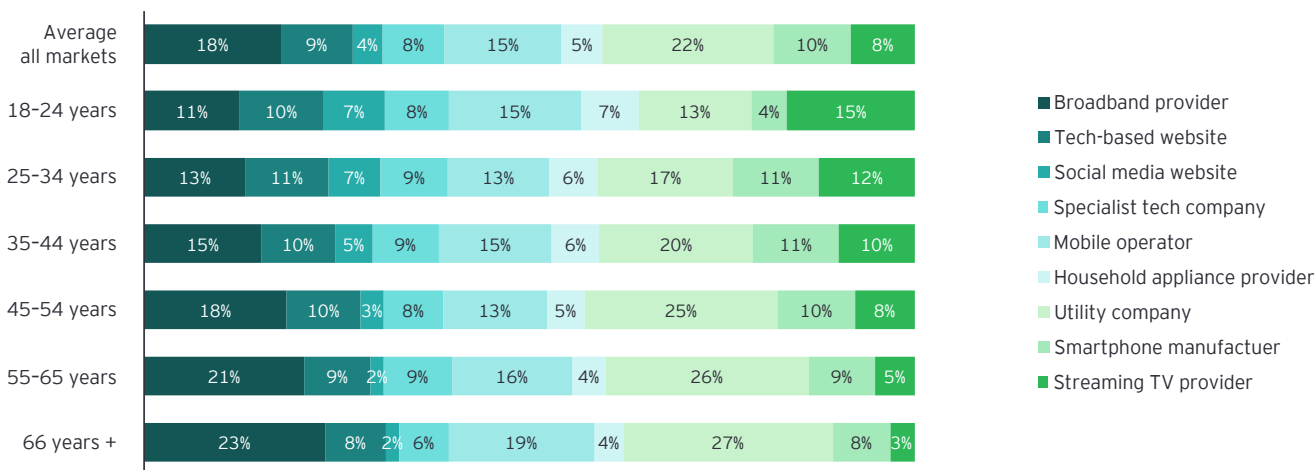


## Broadband and utility providers score most favorably as preferred data custodians

Utility providers, broadband providers and mobile operators score best as preferred custodians of personal data – 55% of respondents on average across markets select one of these types of provider. However, when considering responses by age group, we can see that favorability toward utility and broadband providers drops among younger users: 24% of 18- to 24-year-olds cite them, compared with 50% of users ages 66 years and up. Among this younger group, mobile operators and streaming TV providers are the most trusted data custodians.

Figure 11: Household trust in service providers' ability to safeguard their data: by country and age

**Which of the following types of company do you think would best keep your personal data secure and use it appropriately?**



# 3

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Detailed survey findings

## Evolving connectivity and content needs

# Changing attitudes toward the digital home

The next part of our report considers all the major components of a digital home, and a number of interesting findings emerge. Reliable connectivity is a clear consumer priority and Wi-Fi performance guarantees are not as reassuring as they should be. Nevertheless, households are receptive to new types of broadband bundles that offer, for example, security and smart home features.

The need for value is pronounced across the digital home. Attractive pricing is the top consideration when consumers select streaming platforms, while smart home products are still too expensive for many.

## Households are focused on reliable connectivity and want better Wi-Fi performance guarantees

On average, 55% of households agree that the reliability of their connection is more important than speed – with only 9% disagreeing – up three percentage points year on year. And when they evaluate their connection quality, they are less interested in using speed tests to check against maximum and minimum advertised speeds; consistent Wi-Fi signal performance throughout the home is top of mind instead. While service providers are responding to these needs with “whole house” signal guarantees, households are not prepared to accept these at face value: We can see that 43% believe such messages are either misleading or inaccurate.

Figure 12: Household attitudes toward broadband reliability

**Reliability of the broadband connection is more important than broadband speed**

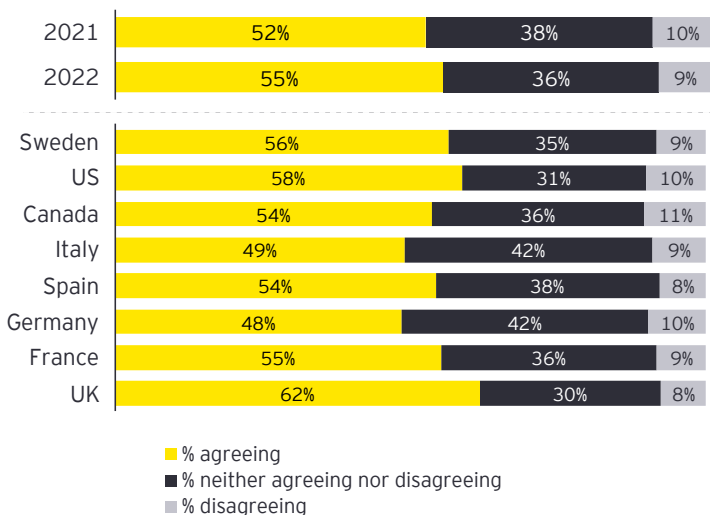
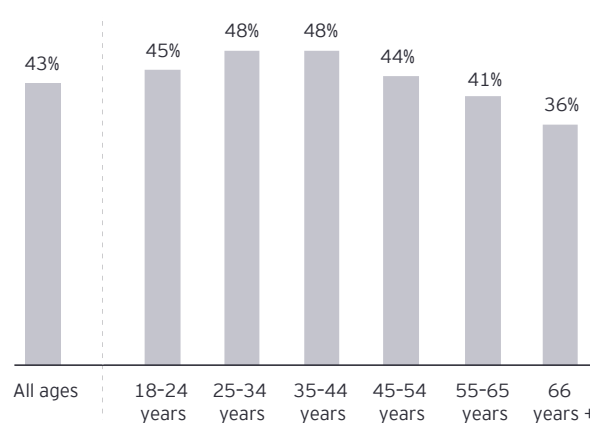


Figure 13: Household attitudes toward broadband reliability

**% think that service provider Wi-Fi performance guarantees are misleading or inaccurate**



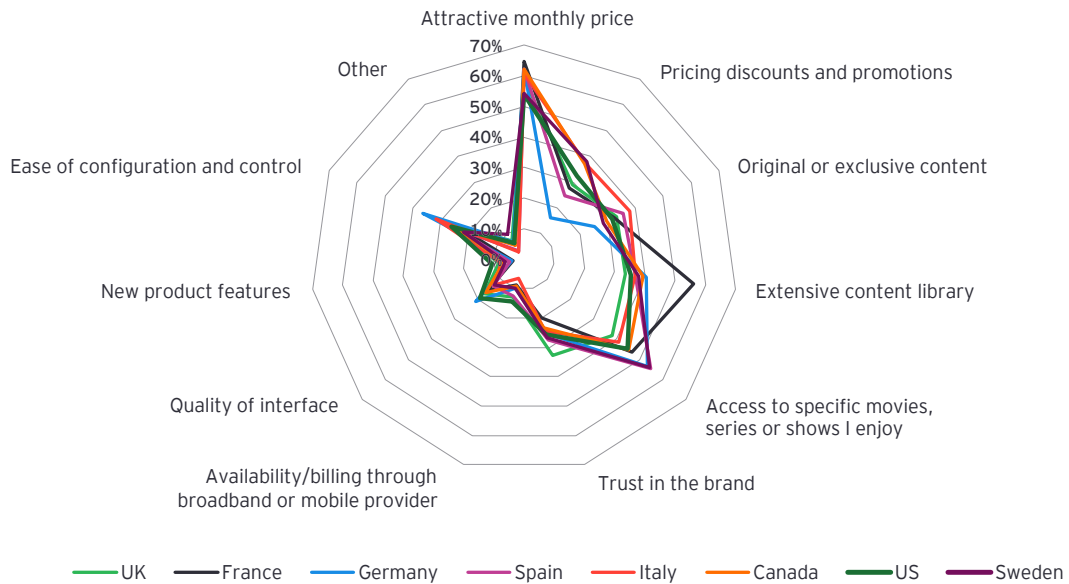
Fifty-five percent of households agree that the reliability of their connection is more important than speed.

## Attractive pricing is critical to the continued adoption of streaming platforms

Attractive monthly prices remain the number one factor considered by households when they evaluate streaming services, selected by 60% of respondents on average. However, the appeal of pricing discounts and promotions varies significantly: 38% of Swedish respondents cite it, compared with 16% of German households. Meanwhile, content specificity (47%) and breadth (39%) rank second and third, although 54% of French streamers value extensive content libraries, which is well above the average. Looking ahead, attractive pricing gives streaming platforms a significant competitive advantage: Over half (56%) of respondents believe they get value for money from streaming, ahead of the 42% who say the same of pay TV services. Retaining these positive perceptions will be vital for streaming platform providers – but challenging given a recent backdrop of price hikes and pressure on household spending.

Figure 14: Streaming platforms: key selection considerations

### What are the three main criteria for choosing a streaming service?





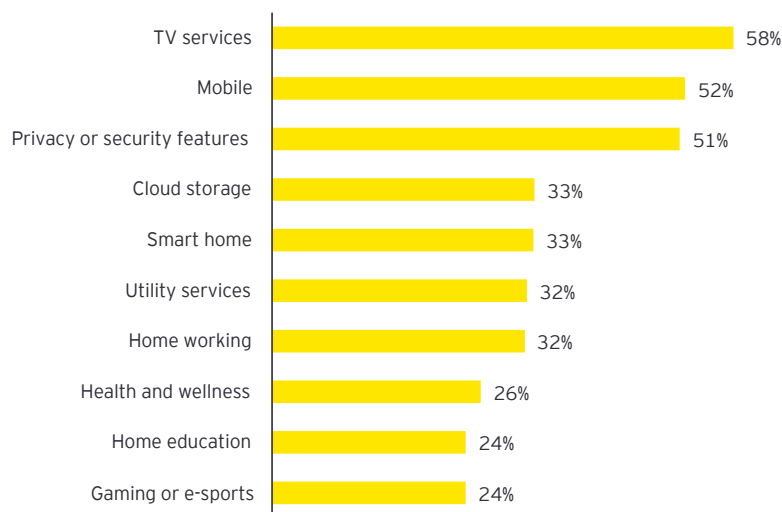
### Households are looking beyond traditional broadband bundles

As households weigh their preferred types of broadband bundle, they are receptive to a range of options. TV and mobile services lead the way as add-ons, reflecting their established positions as bundle elements, while more than half of households cite privacy and security features. Yet several other service elements also feature in the results: Some, such as home working (32%) and health and wellness (26%), underline changing needs resulting from the pandemic. Smart home services are also growing in appeal, cited by 33% of households, compared with 26% in 2021.

Taken together, interest in these different add-ons presents opportunities for connectivity providers to reconfigure their service packages. This is important because some consumers question the merit of traditional packages. While TV is a mainstay of many broadband bundles, a rising proportion of consumers (29%) don't see the advantages of buying broadband and TV from the same provider. This attitude is most marked among 18- to 24-year-olds (36%).

Figure 15: Household attitudes toward future bundle combinations

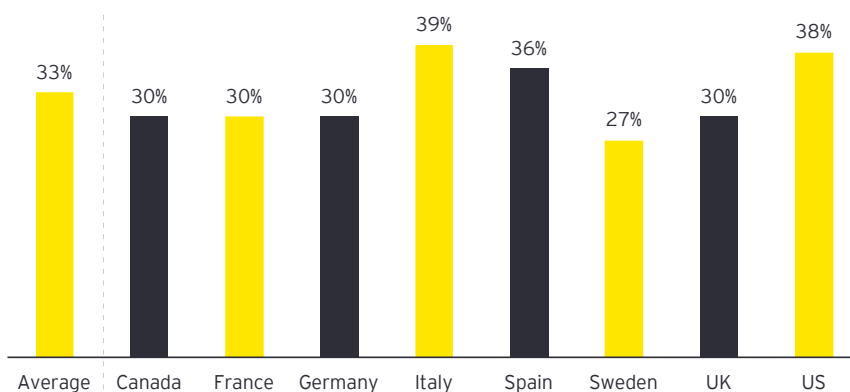
**How likely are you to take a broadband bundle that includes the following additional products and services in the future?**



## Consumers recognize mobile connectivity’s potential as a substitute for fixed broadband

As households consider their connectivity needs, they are receptive to potentially replacing their fixed internet with a mobile connection. One-third (33%) of households signal interest, with appetite highest in Italy (39%) and the US (38%). More than half of households (53%) are interested in mobile plans that offer guaranteed speeds – a charging model well established for home internet. Yet whether they are looking to swap fixed for mobile broadband entirely or add mobile connectivity to an existing broadband package, price savings are the top driver, cited by more than half of respondents. As household spending comes under greater pressure, service providers should consider how mobile can add value to home connectivity propositions. One opportunity could lie in mobile’s role as a backup option, with 29% of households willing to pay more for broadband if backup connectivity options are included.

Figure 16: Household willingness to swap fixed broadband for mobile



As household spending comes under greater pressure, service providers should consider how mobile can add value to home connectivity propositions.

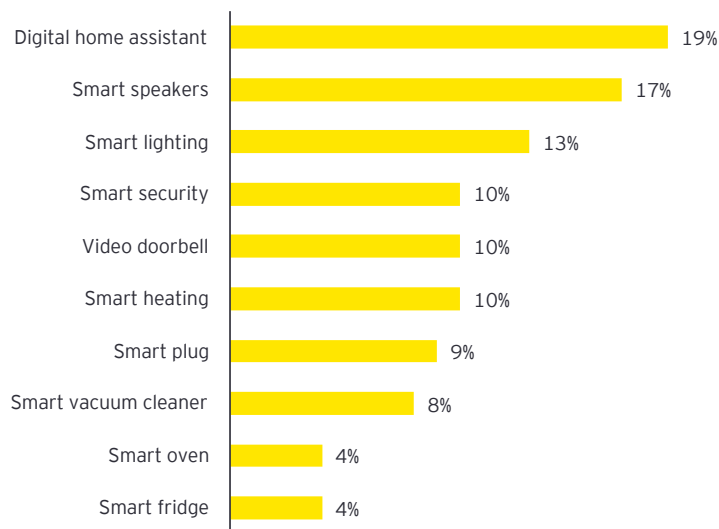


## Smart home products have a foothold – but price, privacy and compatibility concerns constrain further adoption

Smart home products represent a new wave of innovation in the home. From home security to household appliances, new devices and applications are transforming experiences for consumers. Voice-controlled digital assistants are well established, owned by one in five households surveyed, with smart speakers present in 17% of homes. Meanwhile, smart security and utilities feature in one in 10 homes. While this represents a promising foothold, connected home offerings have further to travel in terms of adoption. There are various uncertainties that could inhibit penetration. Sixty-three percent are concerned about hackers’ ability to access the connected home, while 43% are wary about a lack of compatibility between smart home products from different providers. Many of these products remain out of reach for households simply because of cost: Only 26% feel smart home products are reasonably priced.

Figure 17: Household ownership of smart devices

**Which of the following “connected home” or “smart” products is currently owned by your household?**



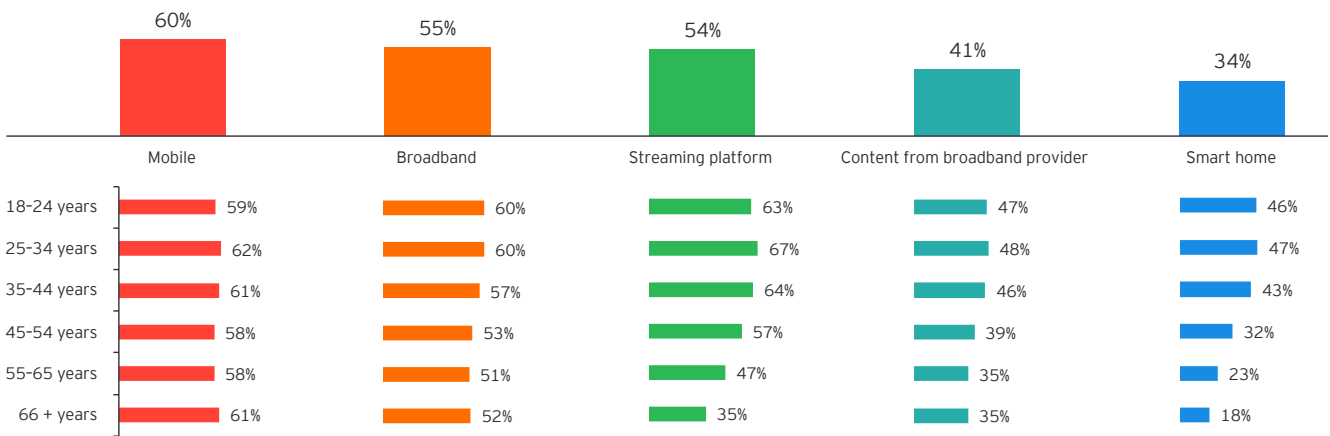
Only 26% of households feel smart home products are reasonably priced.

## Value-for-money perceptions vary according to the type of service taken, with age a significant factor

Consumers believe that broadband and mobile packages offer consumers the best value for money among connectivity and content services. Content from streaming platform providers also scores well, but content from broadband providers and smart home services lag by comparison. However, these value perceptions vary markedly according to age group. Streaming platform content scores highest for users ages 18 to 45, and positive value perceptions toward different types of service are more evenly distributed among younger users in general. This, in turn, puts connectivity providers under pressure: Their overall lead relies heavily on favorability in older households.

Figure 18: Value for money perceptions according to service category: split by age

**% households agree they get value for money from their service or provider**

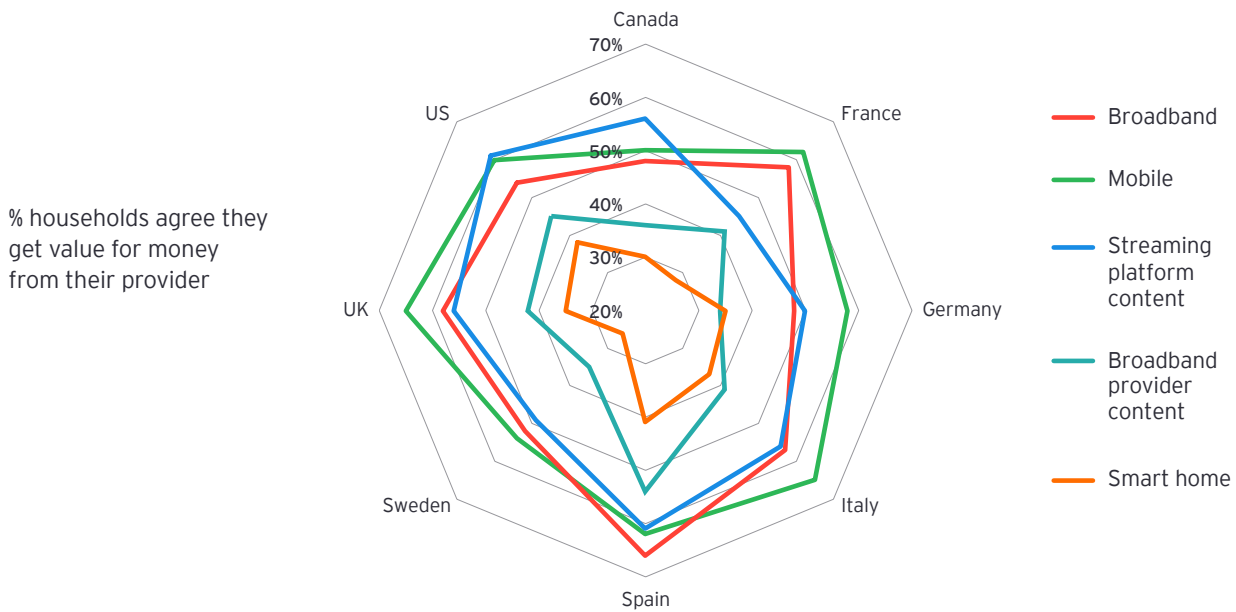




## Opportunities for service providers vary from country to country

As different types of service provider compete for a share of the household wallet, competitive dynamics and opportunities vary by market. Considering consumer value perceptions at the country level, an interesting picture emerges. Mobile connectivity providers score highest in five of eight markets, but streaming platforms lead in North America and broadband providers lead in Spain. Streaming platforms enjoy a substantial advantage compared with broadband provider content in most markets, with this advantage smallest in France. Households in Sweden rank below average for positive value perceptions across all service categories, with Canadian and German households below average in four of the five categories. Service providers with multicountry footprints should pay special attention to these country-level variations.

Figure 19: Value-for-money perceptions according to service category: split by country



**Canada**  
Value perceptions are lowest of the eight markets for mobile and equal lowest for broadband – both score below streamed content.

**France**  
Connectivity value perceptions are much higher than for streaming platform content.

**Germany**  
Value perceptions for broadband provider content are lowest of the eight markets – and equal lowest for broadband.

**Italy**  
Mobile value perceptions equal highest but are in line with average for other service categories.

**Spain**  
Over-indexes on value-for-money perceptions across all services; top scoring for broadband and broadband provider content.

**Sweden**  
Under-indexes on value for money across all services – second-lowest score for both types of content.

**UK**  
Over-indexes on value for money in mobile, broadband and streaming platform content.

**US**  
Value perceptions for streaming platform content are highest of all markets, and ahead of connectivity.

# 4

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Detailed survey findings

## Revisiting customer relationships

# Exposing pain points in the customer journey

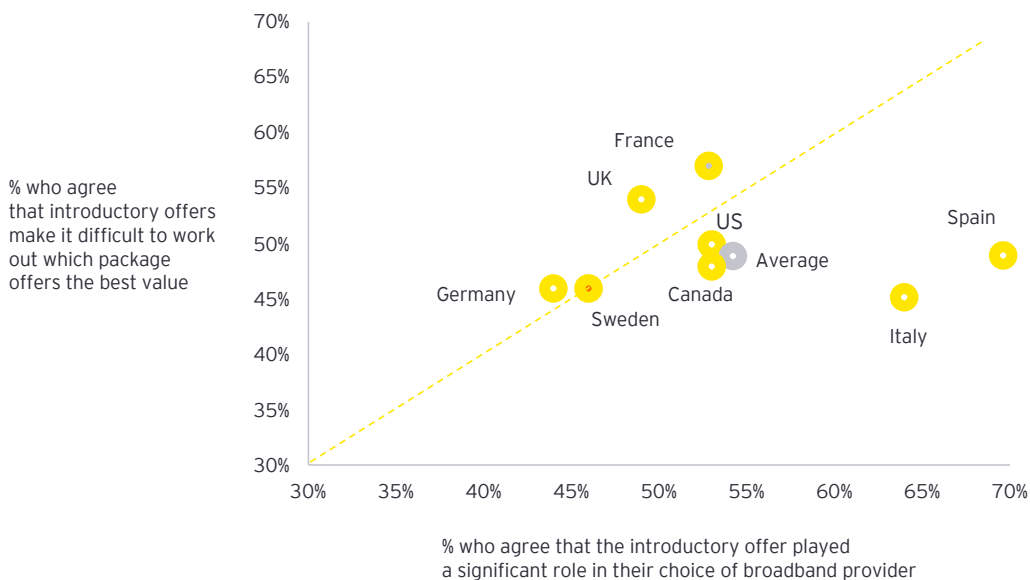
Our survey also explores household attitudes toward their service providers, from the point of service discovery through to purchase and usage. It's clear that many people find today's value propositions complex, which they feel prevents them from making effective decisions. Service installation and configuration also pose challenges, driven by a fear of complexity. Consuming content is also a frustrating experience since many users find it difficult to access their favorite shows and find advertising off-putting.

And when it comes to customer support, there's a craving for familiarity in the form of a human voice. We can see that there's an ongoing reliance on human sales and support despite the shift toward digital channels during the pandemic.

## Value propositions are complex, and introductory offers often confuse

Clear value propositions are critical drivers of effective choices. Yet many households struggle to understand what's on offer and to discriminate between services from different providers. Interestingly, younger users fare no better than their older peers. A considerable 39% of 18- to 24-year-olds feel that communications services are difficult to understand, compared with 33% of all households. In fact, it's 45- to 65-year-olds who fare better than average. While broadband providers often use introductory offers to attract new users, this can be as much a hindrance as a help. Just under half (49%) feel these offers make it difficult to work out which package offers the best value, and just over half (54%) agree they play a significant role in their choice of provider. Households in France, Germany and the UK are more likely to see these offers as a source of confusion than a catalyst for effective decisions.

Figure 20: Household attitudes toward introductory offers



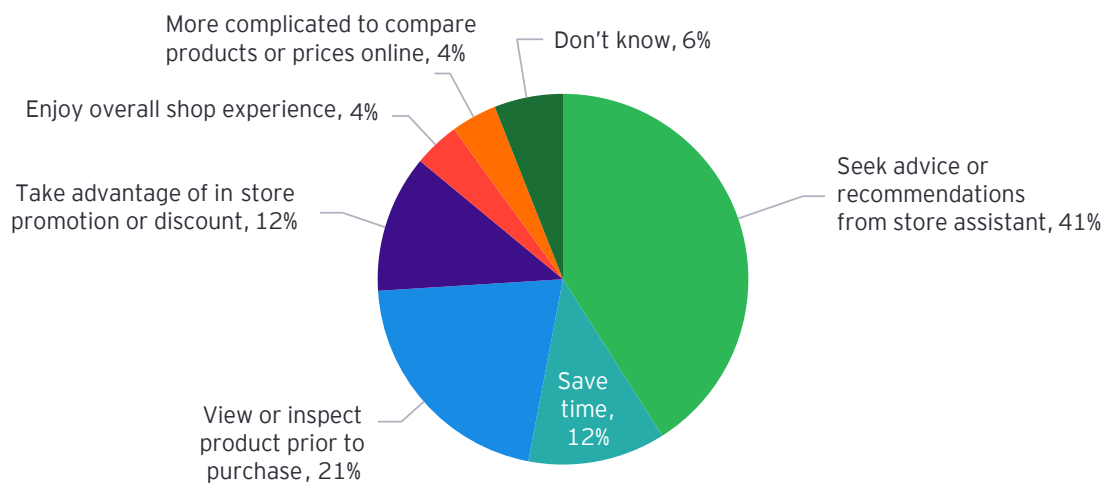
While broadband providers often use introductory offers to attract new users, these can be as much a hindrance as a help.

## The retail store remains important on the path to purchase, with in-store advice the key attraction

The path to purchase has never been more varied for households, with price comparison sites and online communities complementing the digital purchase channels offered by service providers themselves. Yet, 42% of consumers would still visit a physical store first when purchasing a mobile device plan – a proportion that has risen by three percentage points year on year. Even in the UK and Germany, where retail store appetite ranks below average, more than one in four consumers would visit a shop. This year, we asked these customers why they preferred visiting stores, and 41% highlighted the need to speak to a store assistant – despite the availability of guidance online.

Figure 21: Consumer rationales for retail store preference

### Why would you go in store to a retailer to buy a mobile package?



## Setting up services is too complex for some, with younger users more exposed

Service configuration is a critical stage of the customer journey and positive experiences here will do much to help drive overall satisfaction. Yet consumers often find installing services troublesome. Almost one-third (29%) of households find the process of arranging broadband installation challenging, with younger households notably more sensitive. Setting up and configuring smart home devices is also complicated: 34% feel they are too complicated to configure and 37% lack confidence installing these devices. TV apps also pose problems, with younger groups again more exposed than older groups. Looking at the survey findings split by age, it's clear that service providers should focus their efforts on both their youngest and oldest customers to alleviate this fear of complexity.

Figure 22: Household attitudes toward broadband installation via service provider engineers

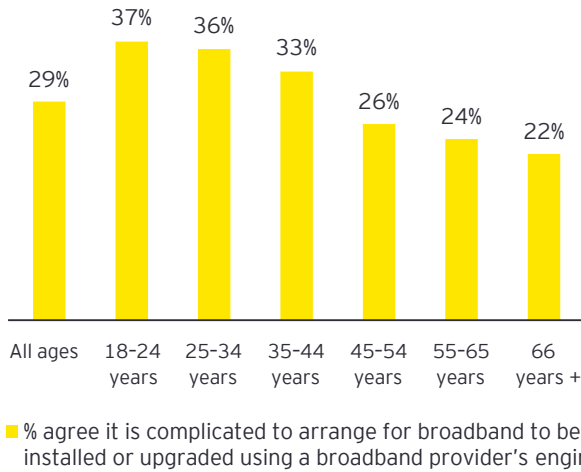


Figure 23: Household attitudes toward configuration of smart home devices

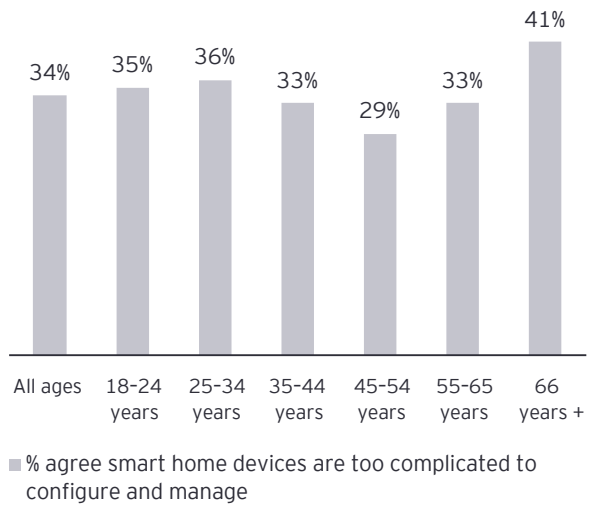
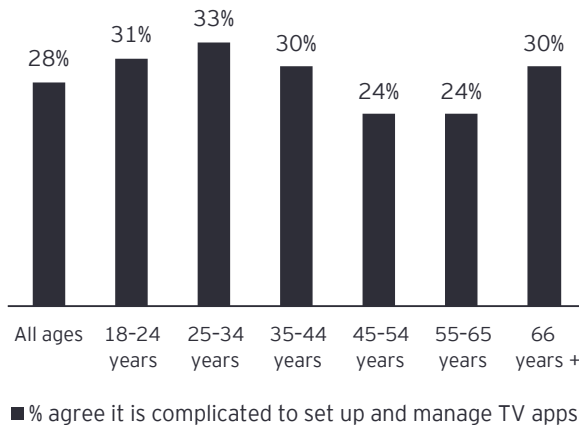


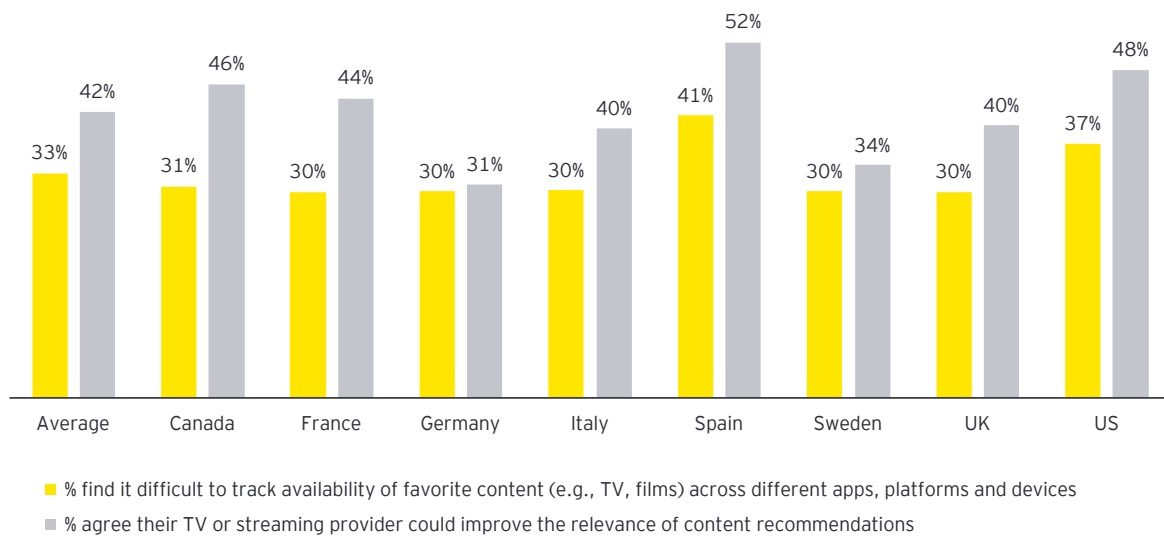
Figure 24: Household attitudes toward configuration of TV apps



## Content tracking and discovery pose challenges, with online advertising another source of frustration

Consumers seek out familiar experiences when they go online: 40% say they only ever use a small number of websites they are familiar with. However, as the online world becomes more crowded, tracking their favorite content has become a challenge: One-third (33%) struggle to work out where their preferred films and TV shows sit across a range of different apps and platforms. And when they do seek out new types of content, households want their TV or streaming providers to deliver better recommendations. This desire for better content tracking and recommendations is most pronounced in Spain and the US, with German and Swedish households comparatively less troubled. Meanwhile, ad-free services also hold appeal: We can see that 29% of households would pay a premium to stream TV without ads, with appetite highest in the US (40%).

Figure 25: Household attitudes toward accessing favored and relevant content



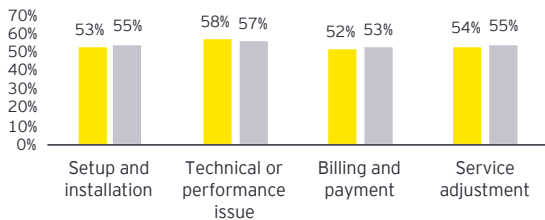


## Reliance on the call center is growing, and households lack confidence in digital support tools

While many households were satisfied with self-service options for customer support during the pandemic – 34% agree this was the case compared with 16% that disagree – this has not translated into rising preferences for website or chatbot interactions with their connectivity providers. Surprisingly, the proportion of households that prefer phoning the call center to resolve queries and issues is on the rise. A lack of confidence in digital tools is contributing to this marked reliance on the call center. Over half (52%) of households don't think instant messaging suits complex queries, while 45% of consumers find it difficult to articulate a broadband issue without speaking to someone.

Figure 26: Customer support channel preferences

### Call center for broadband



### Call center for mobile

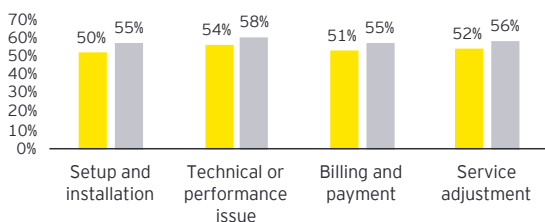


Figure 27: Attitudes toward chatbot support for broadband



# 5

What's next for service providers?





## Next steps for service providers

This year's survey findings reveal a digital home that is the scene of diverse attitudes and behaviors. While the pandemic unlocked a new prominence for connectivity and content providers – alongside greater receptivity to new digital experiences – it also compounded existing fears around data disclosure and online wellbeing. As the public health crisis recedes, households face new priorities, from navigating the cost-of-living crisis to pursuing more sustainable lifestyles. Demand scenarios remain inherently volatile as a result, and while service providers must adapt to near-term uncertainties, they should also reframe their strategies to build long-term value as the competitive environment becomes more congested. Opportunities to increase levels of customer satisfaction and loyalty exist, and service providers should recognize and act upon them.

# 1.

### Bring more clarity to your value proposition

Households' focus on value and trust has never been greater. Service providers should double down on the key benefits of their offerings, communicating these with clarity and empathy. Likewise, customer promises should be tangible and easy to understand – whether these relate to service performance and availability or data protection. Ultimately, consumers who are empowered to make better decisions are more likely to become satisfied and loyal customers.

# 2.

### Drive greater trust in your data protection credentials

Consumers of all ages remain anxious when it comes to disclosing their personal data online, and data security is an important consideration when evaluating home connectivity needs. In a world that has become more digitized since the pandemic started, it is vital that all service providers act now. Outlining data protection principles is essential, as is allowing users to have control over the data they share. Security features are a vital element of any connectivity service, whether a broadband package or smart home product.

# 3.

## Improve levels of collaborative innovation

As competition intensifies, service providers must make the most of their core competencies. With this in mind, adding value through partners and industry ecosystems is now a critical part of the innovation process. Whether refining content portfolios, combating online harms or extending the reach of digital infrastructure, new forms of collaboration are essential. Service providers should take care to refresh their partner and supplier frameworks, ensuring that they are fit for purpose.

# 4.

## Build a social contract that delivers digital upside for all

As connectivity and content providers look to build on their newfound importance as the pandemic recedes, it is vital that they reinvigorate their social and environmental purpose. This will not only help them meet consumers' changing expectations but will help them build better levels of alignment with governments and regulators on digital trust and inclusion principles. A successful social contract will also help them attract and retain the best talent going forward.



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# How EY can help

## **Commercial excellence**

EY teams can help organizations optimize their sustainable growth strategies through improved sales, marketing and service approaches, and drive better financial outcomes such as revenue, profitability and market share growth.

## **Customer experience**

Our experienced EY teams can enable organizations to deliver differentiated experiences for people, customers and employees to drive long-term value and revenue growth. We help organizations understand their customers, design engaging and automated omnichannel experiences, use customer experience as an innovation platform and reimagine the enterprise with reinforced human capital via the right data, technology and capabilities.

## **Product and service innovation**

EY teams can support organizations to discover, define, deliver, launch and scale products and services for purposeful growth and long-term sustainable value.

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