Six key trends shaping the digital home — and how to stay ahead of them
Key trends 1

Home internet is the oxygen breathing new life into value propositions

Key trends 2

A nation of streamers. Uncovering the aggregation opportunity
Key trends 3

Blurred lines. 5G and the convergence of home internet and wireless

Key trends 4

The smart home is on the move – can you keep pace?
Key trends 5

Making a secure connection in the digital home

Key trends 6

Keeping it simple – improving consumer interaction and experience
Infographics
80% of respondents are satisfied with their home internet speed.

61% of respondents try to spend as little as possible on communication services (up 6 points year over year).

Households with internet-only packages

<table>
<thead>
<tr>
<th>Age Range</th>
<th>18-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
<th>66 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>51%</td>
<td>46%</td>
<td>42%</td>
<td>42%</td>
<td>34%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Which advanced internet features would be appealing to you?

- Data protection/private browsing: 52%
- Outage protection (4G failover): 43%
- WiFi signal management/assessments: 39%
59% of respondents say their households get more value from streaming services than Pay TV (up 6 points year over year).

23% of households have interest in competitive video gaming esports.

24% of households watch videos of online gaming/esports competitions.

Streaming is gaining speed

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attractive price</td>
<td>59%</td>
</tr>
<tr>
<td>Extensive content library</td>
<td>48%</td>
</tr>
<tr>
<td>Original content</td>
<td>47%</td>
</tr>
<tr>
<td>Pricing promotions</td>
<td>42%</td>
</tr>
<tr>
<td>Customer experience</td>
<td>32%</td>
</tr>
</tbody>
</table>
Consumers are willing to switch carriers or pay a premium for access to 5G

- Would be interested in switching providers to get 5G in their area: 48%
- Would be willing to pay a premium for 5G devices and plans: 45%
- Would be willing to pay a premium for 5G plans: 28%

Overall, 50% of respondents identified level of discount on monthly price as a main criteria.

- Respondents purchased a converged bundle due to existing internet service: 43%
- Respondents purchased a converged bundle due to existing home wireless service: 26%
- Respondents purchased a converged bundle at the same time out of convenience: 24%

Why are you likely to take a bundle that provides an integrated experience?

- Respondents identified level of discount on monthly price as a main criteria: 49%
- Respondents identified ability to manage one account as a main criteria: 39%
- Respondents identified ability to have one bill a main criteria: 34%
- Respondents identified ability to contact one provider a main criteria: 27%

Of respondents stated that they are likely to be likely or very likely to continue to have a bundle that provides an integrated experience combining home internet and wireless service.

- 32% of respondents stated that they currently have home internet and wireless service from the same provider.
- 60% of respondents stated that they would be likely or very likely to continue to have a bundle that provides an integrated experience combining home internet and wireless service.
41% of respondents are not confident in their ability to self install smart home devices.

28% of respondents find smart home devices difficult to set up and control using mobile apps.

Devices with strong uses cases are positioned for the highest adoption in the next 5 years.

- **Smart locks**: 13% currently own, 2.4x increase in ownership by 2025.
- **Smart video doorbells**: 18% currently own, 2.2x increase in ownership by 2025.
- **Smart security systems**: 20% currently own, 1.9x increase in ownership by 2025.

With more consumers staying at home due to COVID-19, **will adoption be re-stimulated?** A study in the UK showed that 53% of consumers are using voice-controlled assistants more since the lockdown began.1

Lack of integration across devices from multiples brands and few strong use cases may be limiting engagement and therefore further adoption.

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1. Source: [Study on consumer behavior during COVID-19](https://www.example.com/researchudy)...
52% of respondents found security and data protection/private browsing features to be appealing.

25% of respondents said that the offering of data security and privacy products is one of the most important factors they consider when choosing a home internet provider. This is up 6 points year over year.

What types of companies would best keep your personal data secure and use it appropriately?

- Utility provider (e.g. ConEdison, Pacific Gas & Electric)
- Home internet provider (e.g. Xfinity, Spectrum)
- Wireless service provider (e.g. Verizon, AT&T)
- Technology-based website (e.g. Amazon, Google)
- Smartphone provider (e.g. Apple, Samsung)
- Video streaming provider (e.g. Netflix, Disney+)
- Social media provider (e.g. Facebook, Twitter)
- Household appliance provider (e.g. Whirlpool, GE)

All respondents Age 18-24
34% of respondents will pay more for their internet bundle in return for customer service. This number increases to 45% for the 18-35 year old segment.

Digital tool adoption rates 2020

8%  9%  13%  17%
Email  Instant messaging function  Online contact form

- All survey respondents
- Age 18-34 customers