

#wifintelligence

2021

**Consumer
Expectations
for Home Wi-Fi -
The Year
Everything
Changed**

Multi-country survey

airties 





What you'll find in this report

This survey was commissioned by Airties to better understand if and how the pandemic has changed consumers' expectations for their connected home life.

It is based on a survey carried out by Qualtrics of 1,575 respondents across three markets; the U.S., U.K. and Germany. The target population was households that included at least 1 person over the age of 18 who worked or studied from home over the prior year.

The findings demonstrate how the COVID-19 pandemic has permanently shifted consumers' needs and expectations for home Wi-Fi.

Table of contents

A note from Philippe Alcaras, CEO of Airties	03
Highlights	04
The increased importance of home Wi-Fi	05
Working from home: a permanent change?	10
Consumer experience and expectations for ISPs	15
What options are available to broadband operators?	20



A note from Philippe Alcaras, CEO, Airties



Philippe Alcaras,
CEO, Airties

During this unprecedented time, people have come to rely on and value their home Wi-Fi more than ever.

We have crossed an inflection point where Wi-Fi is as vital as electricity for sustaining our way of life – keeping us productive, informed, entertained, and connected.

Even as some countries begin opening more, reliance on home Wi-Fi has forever changed. The increasing ‘enterprisation’ of the home, as well as remote learning and telemedicine are trends that are here to stay, and that bring significant opportunities and challenges for broadband operators around the globe.

Here are my 3 takeaways from the report:

- Employer support for *Enterprisation* of the home, with 39% of respondents reimbursed by their employer for new Wi-Fi gear they purchased during the pandemic
- A majority of consumers (58%) would consider upgrading to a faster tier of Internet if bundled with whole-home Wi-Fi
- Most consumers are using Wi-Fi in new places within the home (attics to garages), with 71% expecting to continue working from home post pandemic

I hope you will find it a helpful guide.

On behalf of Airties,

Philippe Alcaras



Highlights

Significant Opportunities for Broadband Operators

01 Expectations for the Connected Home are forever changed

The behaviors and expectations of consumers have evolved at unprecedented speed and to an unparalleled extent.

With usage up for 90% of respondents, the standard offering for homes now needs to support bandwidth-hungry applications, more intensive usage with anywhere up to 20 active devices at once and a “peak usage” period that has gone from evenings and weekends to 12-15+ hours every day.

02 Enterprisation of the home

The lines have permanently blurred and 71% of those surveyed expect to continue working from home, post-pandemic. This is not without challenges as the users’ connected experience becomes critical in a work from home environment, but it represents a massive opportunity for operators who double down on service delivery.

Recognizing this trend, employers have started subsidizing home Wi-Fi solutions and even the broadband subscriptions for their staff.

03 Consumers want their service provider to take charge

The trust that has been hard-earned is paying off; the ISP is emerging as a key lifeline provider through the pandemic.

Despite a plethora of retail or alternative provider solutions, consumers still strongly prefer their ISP to manage the end-to-end delivery of their connected home (80% of those surveyed), right down to each device and across all applications. This is also matched in an increased willingness to pay, for example for top tier offers, Wi-Fi guarantees, advanced self-support features via a companion app and additional services such as cybersecurity.



The increased importance of people's home Wi-Fi





Wi-Fi usage is up & valued more

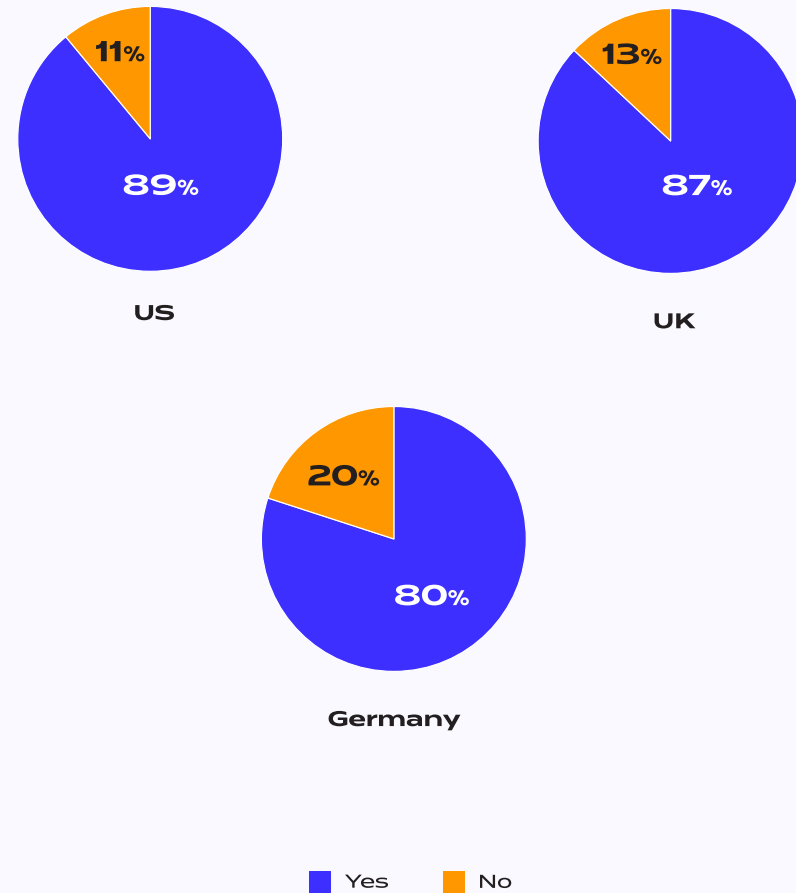
85%

value or rely on their home Wi-Fi more than before

It will surprise no-one to learn that Wi-Fi usage within the home increased dramatically over the past year.

With stay-at-home orders throughout the world, people suddenly depended on their Wi-Fi to work, study or simply stay connected with the world beyond their home.

Do consumers value home Wi-Fi more than before





Wi-Fi usage is up & valued more

90%

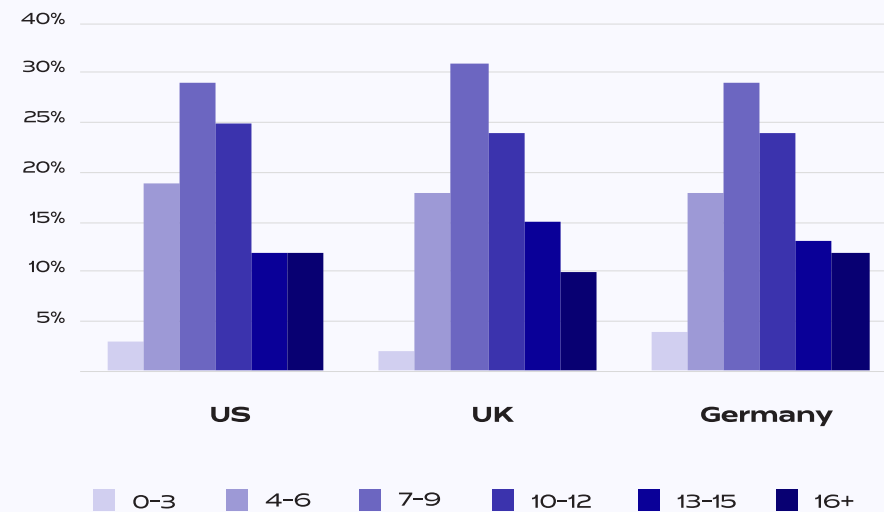
are using their Wi-Fi more than before the pandemic

This is a common pattern across all geographies, proving most significant in the US and UK, where **93%** claim to use their Wi-Fi more compared to **86%** of Germans.

A closer look at the breakdown, however, shows the difference may simply be due to perception, as the hours of Wi-Fi activity are on a par across all three territories.

This is especially true for the more intensive usage (at least 10 hours per day) which represent half of all respondents for all three countries.

Total hours active on Wi-Fi per day





Daily Wi-Fi usage has intensified

Let's take a closer look at the share of respondents (90%) whose daily Wi-Fi usage has increased compared to pre-pandemic.

35%

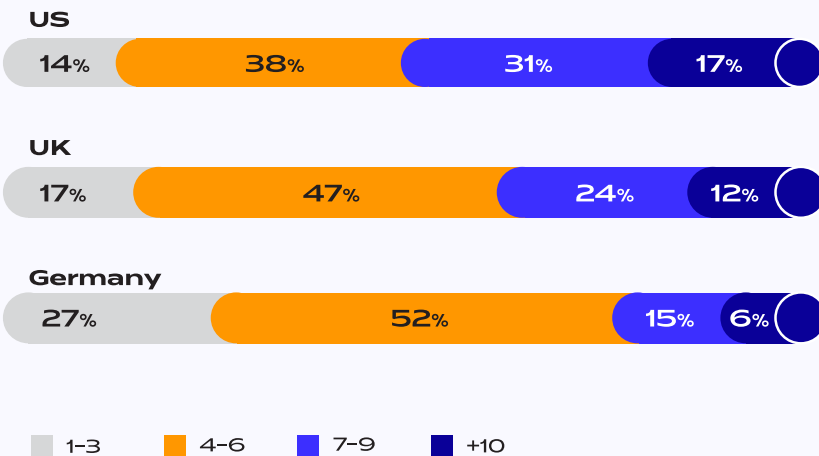
on average across all countries are using Wi-Fi for an additional 7-10+ hours per day

Daily use has increased most in the US, with time spent on Wi-Fi up at least 4 hours per day for **83%** of Americans.

Almost half of Americans (**48%**) are using their Wi-Fi for an additional 7-10+ hours per day, compared to **21%** of Germans and **36%** of Brits.

At the most extreme end of the scale, where people have been spending at least 10 extra hours per day connected via Wi-Fi, the US was again highest, with **17%** of respondents.

Additional hours on Wi-Fi per day





Wi-Fi coverage needs

Just over half of all homes experience areas of bad Wi-Fi coverage, which are essentially due to factors such as home size and number of floors, as well as building materials used.

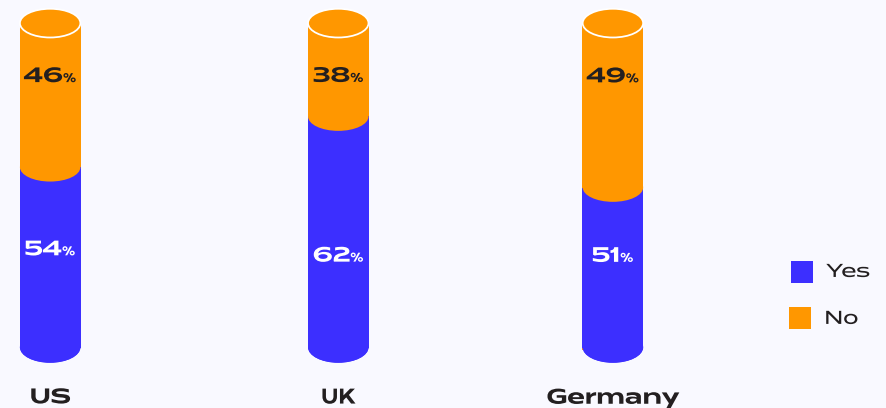
This reality may be made worse - at least partly - by the new pattern of connecting from areas of the home not previously used for work or study, as people try to find a quiet place away from other family members.

56%

have areas in the home with no Wi-Fi coverage and may need extenders

This issue is particularly prevalent in the UK - as many as **62%** of Brits have experienced Wi-Fi dead zones in their households.

Areas of the home with no Wi-Fi coverage

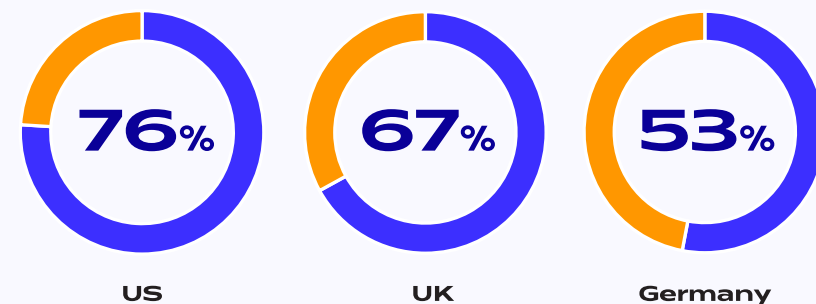


65%

are using Wi-Fi in new areas of their home

This trend is particularly strong in the US, with **76%** Americans who declare to use their Wi-Fi in areas where it was not used before, such as garage, attic, basement, etc.

Wi-Fi usage in new areas of the home



**Working from home:
a permanent change?**





Increased Wi-Fi usage is here to stay

71%

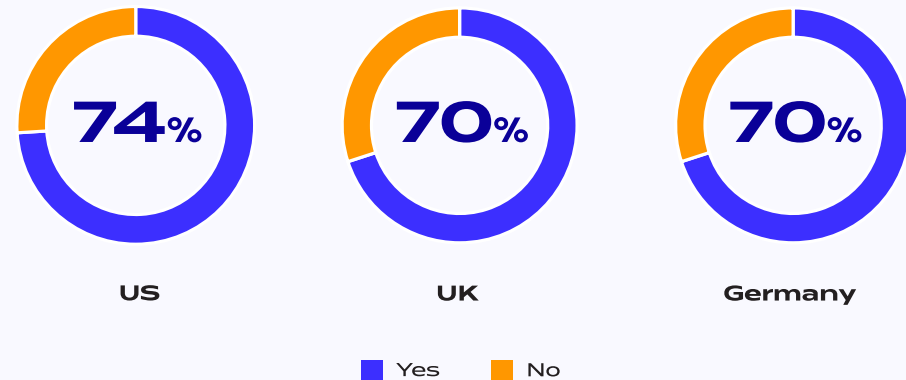
expect to continue working from home post-pandemic

This is a general pattern across all markets, slightly above the average in the US - almost **3/4** of respondents say their employer is already committed to a hybrid or fully remote work model post-pandemic.

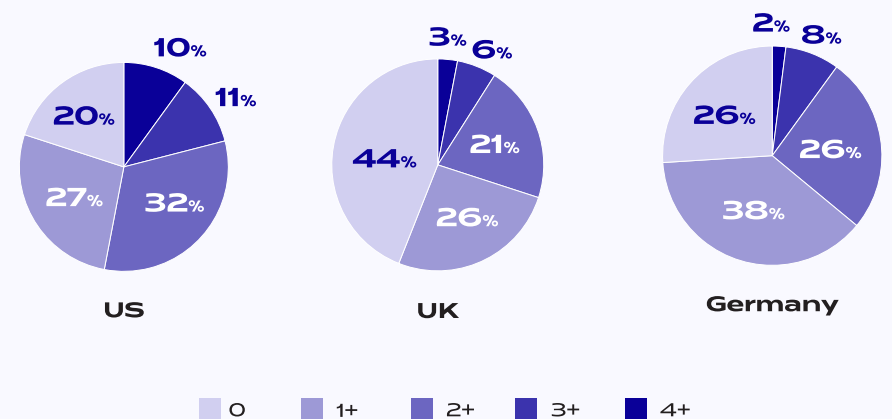
Study from home was also a major factor in the uptake in Wi-Fi usage, with a majority across all markets showing at least 1 home-student.¹

40% have 2 or more people studying from home.

Expect to continue working from home post-pandemic



People studying from home per household



¹ This poll was carried out in homes with at least 2 people.



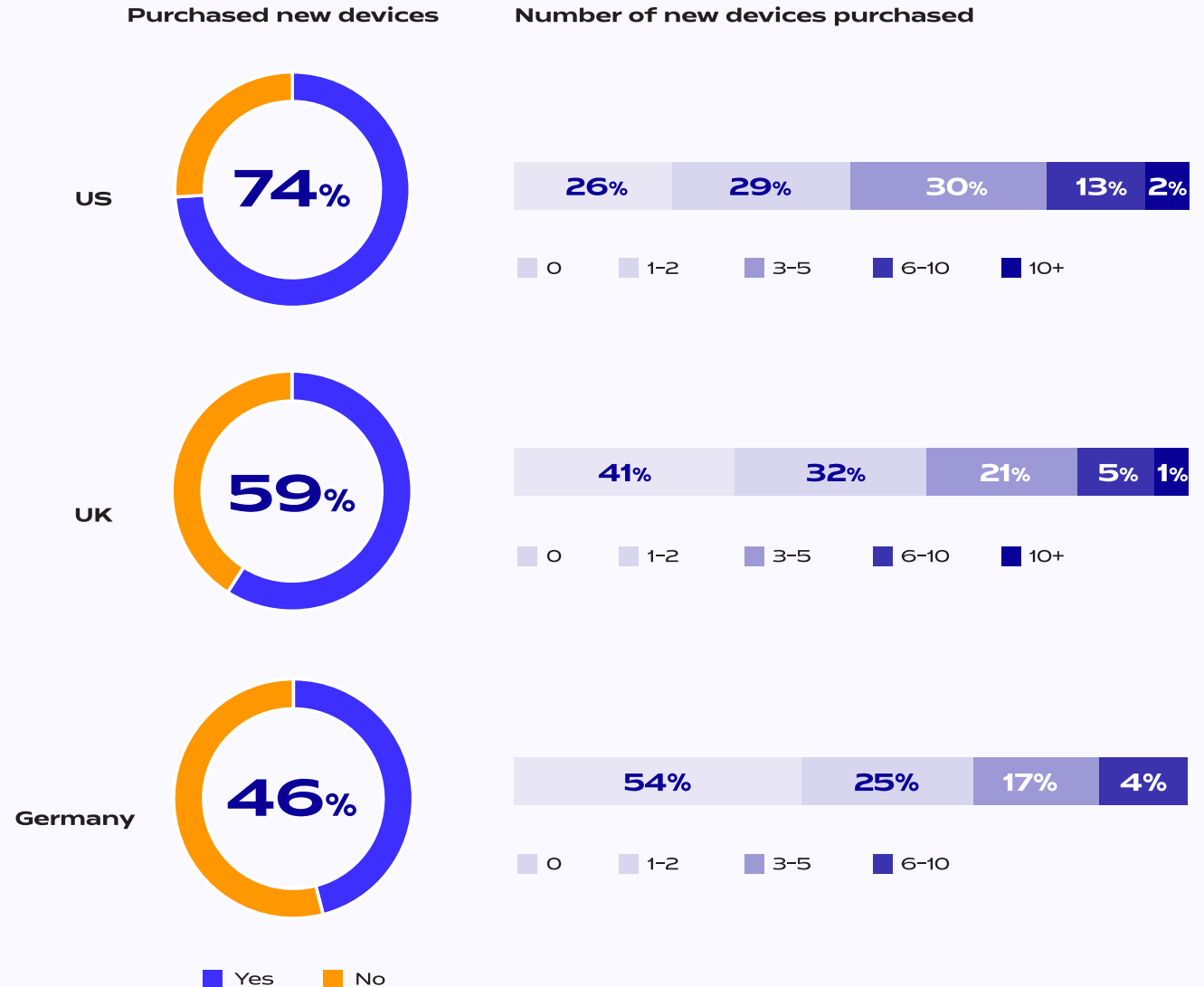
Purchasing new Wi-Fi enabled devices to stay connected

60%

of all respondents have had to purchase at least 1 new Wi-Fi enabled device to stay connected

This trend was once again most prevalent in the US, with 74% of Americans having bought new devices, such as laptops or tablets etc. needed to work or learn from home.

An average of three (3) new devices was purchased by British and German households, rising to just under 4 on average for their American counterparts.





Wi-Fi devices in simultaneous use

It is not only the number of new Wi-Fi devices that has increased, but also the number of devices being used at the same time, putting additional pressure on home networks.

71%

said they have more devices in simultaneous usage than pre-pandemic

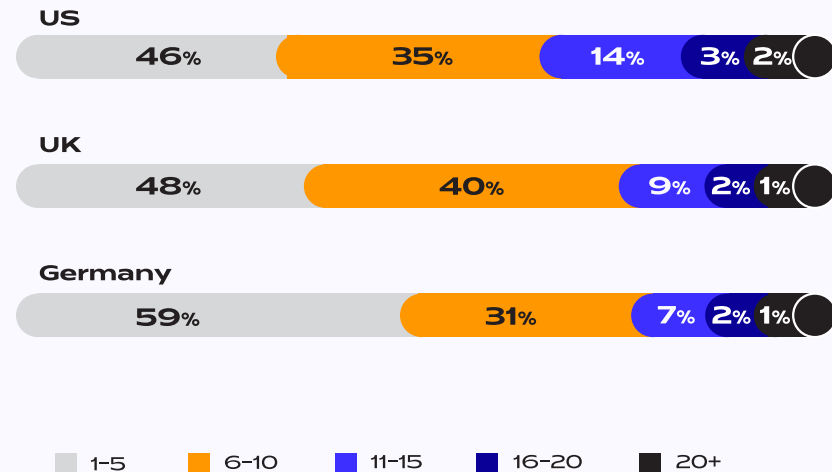
49%

have at least 6 devices in use simultaneously

This breaks down into 35% of respondents who claim to use between 6 and 10 Wi-Fi connected devices at once.

And at the top end of the scale, the remaining 14% indicated that they have anywhere between 11 to 20 devices in simultaneous use.

Number of Wi-Fi devices in simultaneous use





Enterprisation of the home; employer support for home connectivity

The survey results indicate that a significant number of employers across all countries are considering or have already committed to a hybrid or fully remote work model post-pandemic.

This "enterprisation" of the home has also triggered employer support with reimbursement of Wi-Fi equipment or subsidies for employee's broadband subscription.

This phenomenon has been visible across all markets, but strongest in the US. **For broadband operators, this means opportunity of new Smart Wi-Fi business models aimed at employers.**

39%

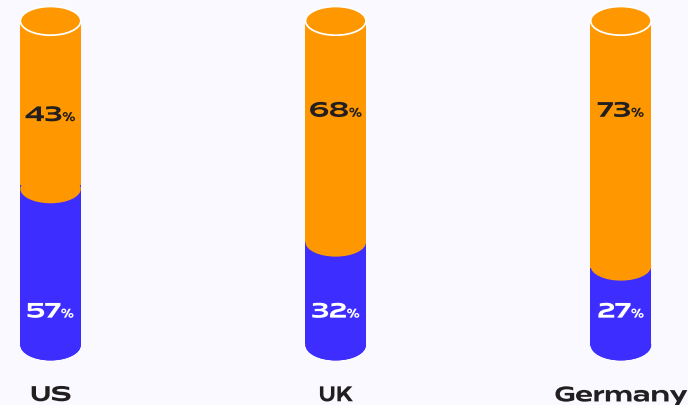
have been reimbursed for new Wi-Fi gear to stay connected

32%

received a subsidy for their broadband subscription

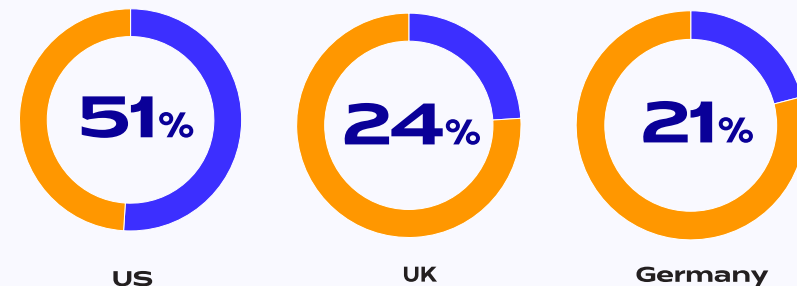
However, this area shows huge disparities between markets - with just over half of Americans who received a broadband subsidy, more than twice that of the European average.

Reimbursement of new Wi-Fi equipment



■ Yes
■ No

Broadband subscription subsidy





Consumer experience and expectations for ISPs





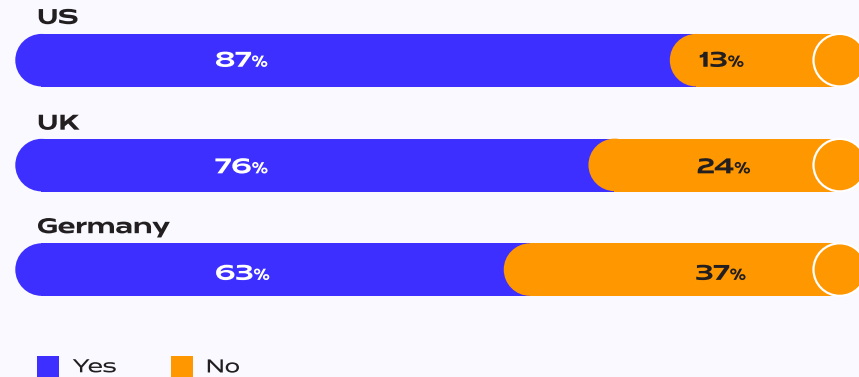
The good news: ISP response during lockdown was appreciated

75%

think their broadband operator responded well to their needs during the pandemic

This perception was particularly positive in US (87%).

Positive perception of ISP support during pandemic.



The caution... Consumer experience is still far from perfect

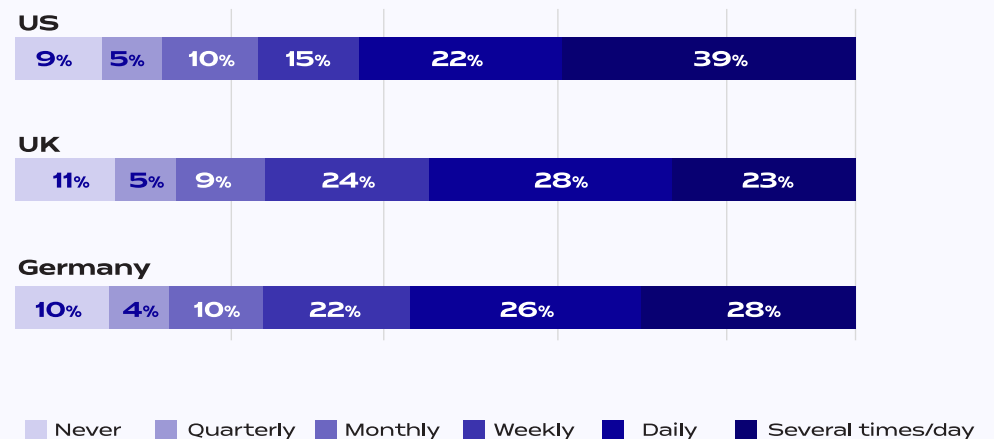
55%

experienced daily issues with their Wi-Fi

An astonishing 39% of Americans experienced issues several times per day!

33% of all respondents said the most common issue was slow Internet, while 45% could not connect to the Internet, a streaming service or a Wi-Fi enabled device.

Frequency of Wi-Fi Issues





Contacting ISP to fix Wi-Fi issues

63%

rang their ISP to fix the Wi-Fi

27%

calls required a technician visit to fix the issue

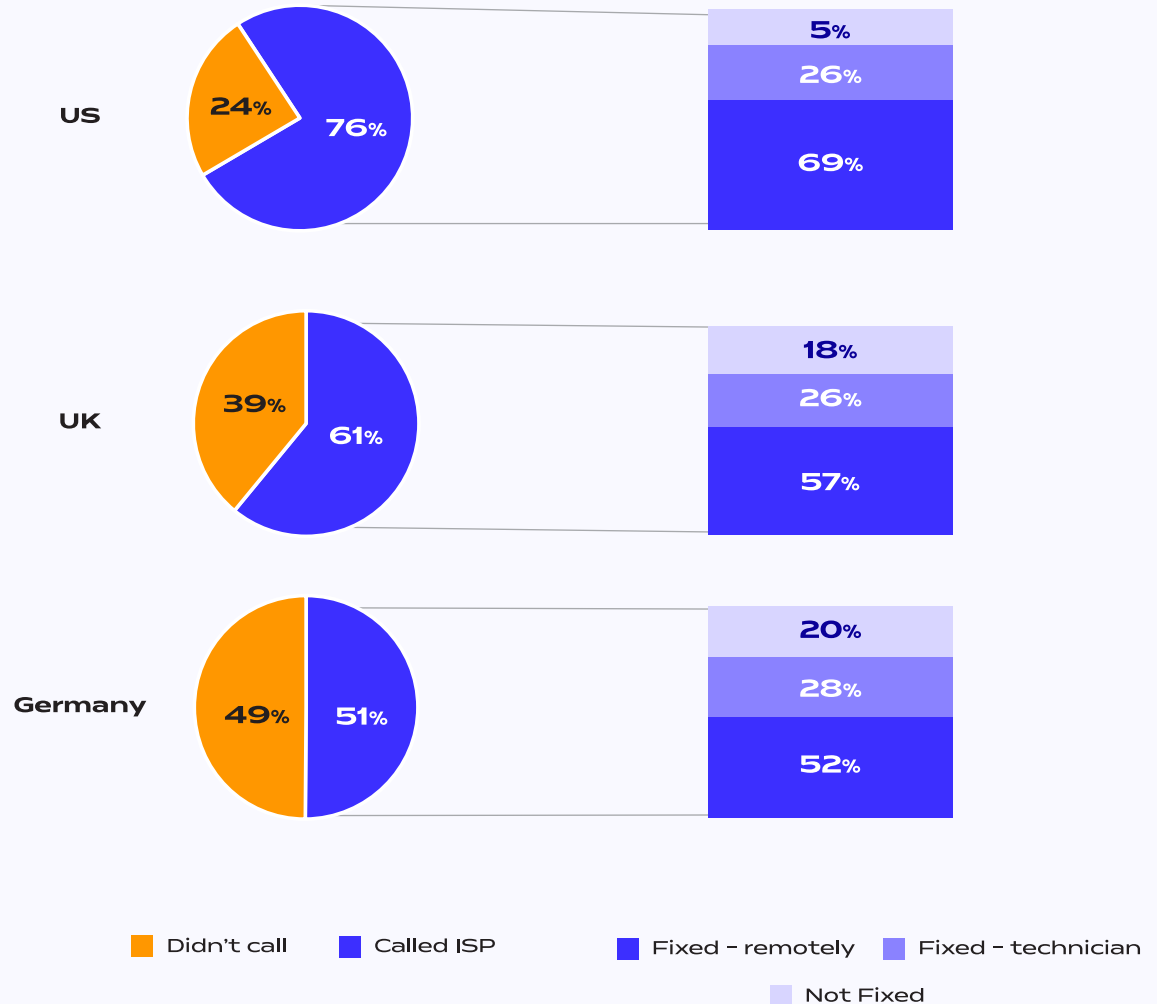
Of those that called their ISP,

40% of cases required a technician call-out or were not resolved.

27% fixed by a technician

13% not fixed

Contacted ISP to fix issues and breakdown of how they were resolved





Contacting ISP to fix Wi-Fi issues - silent sufferers

Of those who did not call their broadband operator, many were discouraged by the time and effort involved.

37%

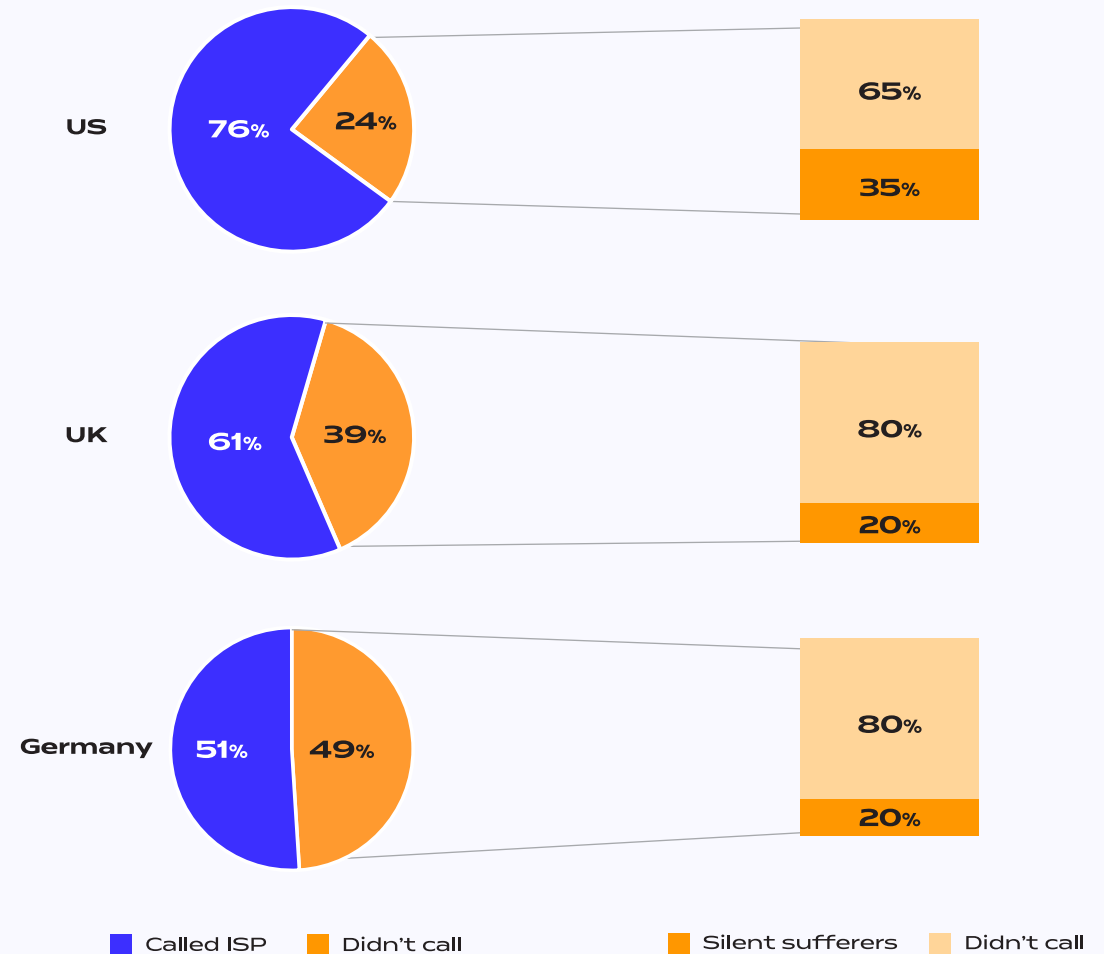
of respondents did not contact their ISP during the pandemic

This doesn't mean, however, that they haven't suffered from any Wi-Fi issues.

27%

of them wanted to call but decided not to, due to time/effort required.

Contacting ISP to fix issues and silent sufferers





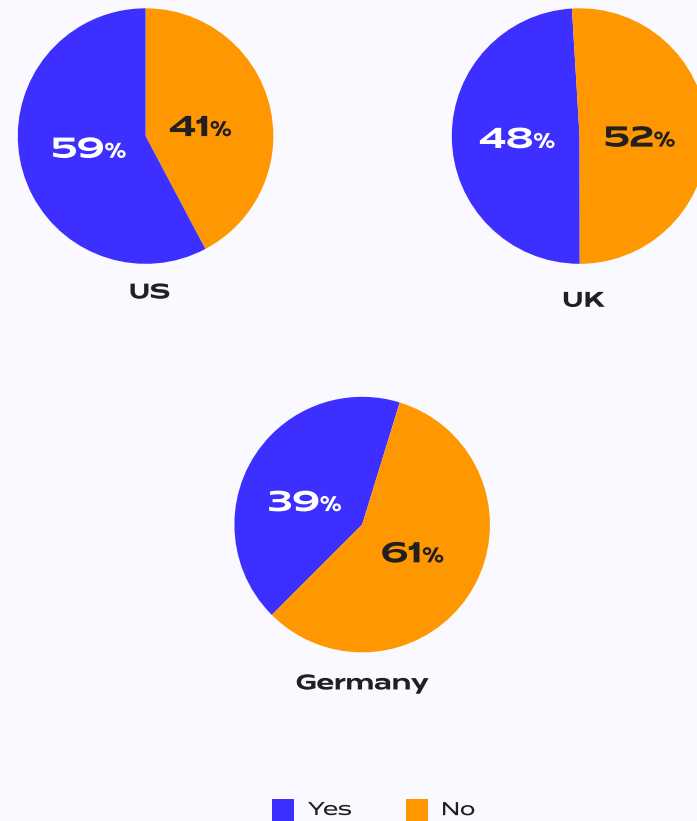
Changing broadband operator due to the issues encountered

49%

on average have considered changing their broadband operator

We can clearly see that Americans are most likely to switch their provider as a result of poor Wi-Fi experience (59%). This tendency is lower for Germans (39%).

Considered changing broadband operator





What options are available to broadband operators?





Include Smart Wi-Fi in broadband offer

80%

would prefer ISP to provide Wi-Fi gear over purchasing through retail.

This preference is the strongest in the UK, where **87%** would like their Wi-Fi gear be included in their internet package.

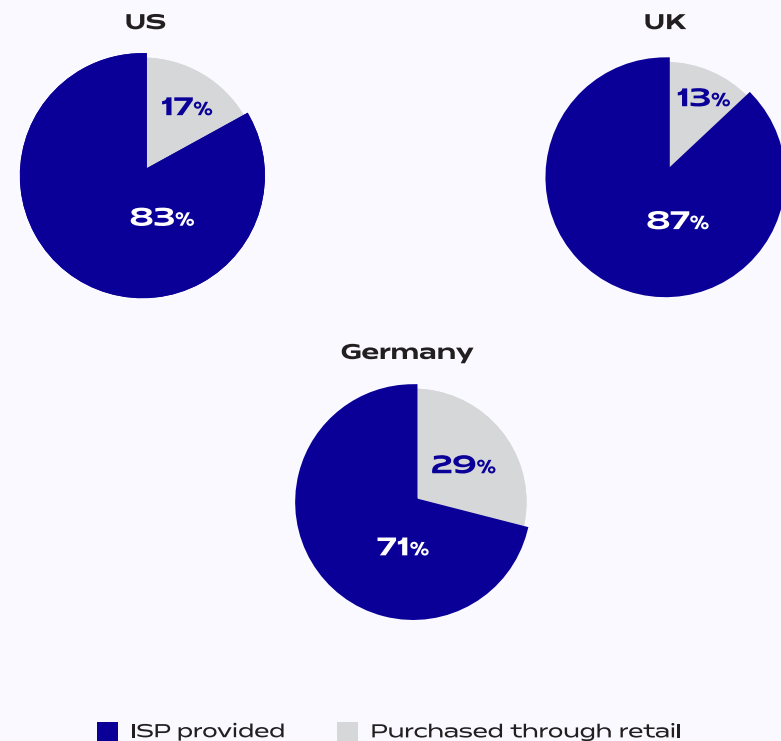
Despite a strong retail tradition in Germany, the vast majority of consumers prefer to receive Wi-Fi equipment from their ISP than through retail

54%

respondents declare to have bought Wi-Fi gear through retail at some point. Americans ranked above average with **68%**.

Of those that purchased retail products, **64%** indicated that they have already called their ISP to complain about their Wi-Fi performance.

Preference for ISP provided Wi-Fi gear





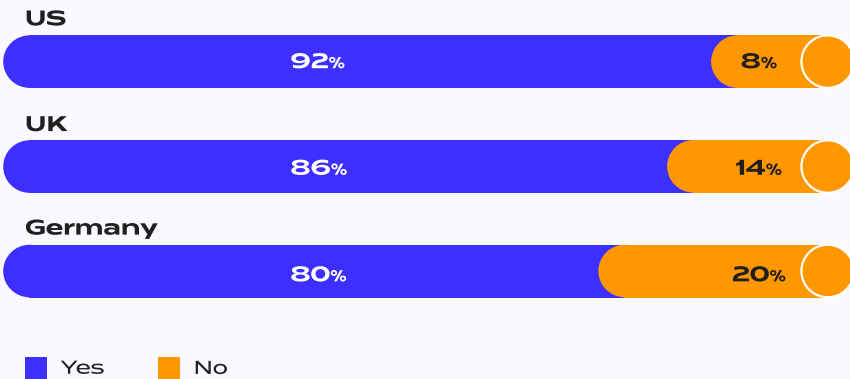
Bundling whole-home Wi-Fi with top-tier broadband

86%

on average consider that top-tier broadband should come with a whole-home Wi-Fi guarantee.

Once again, the UK was in line with the overall average of **86%**, whereas a massive **92%** Americans agreed with the statement.

Expect top tier broadband to include whole-home Wi-Fi





Willingness to upgrade for better Wi-Fi

We asked if people had already or would consider upgrading their broadband subscription for “faster or more consistent Wi-Fi in every room”.

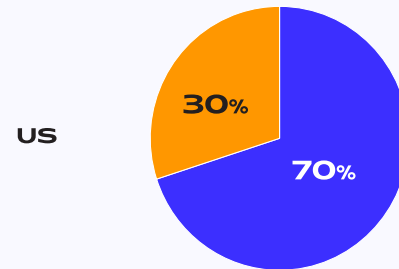
51%

On average, over half of all respondents upgraded their broadband subscription during the pandemic, but there are significant differences between markets.

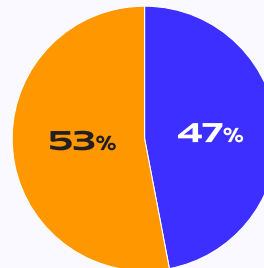
The number of Americans who upgraded their broadband tier (70%) is double that of Germans (35%)

Of those who have upgraded, 70% are paying between \$/€/£ 5-10 extra per month.

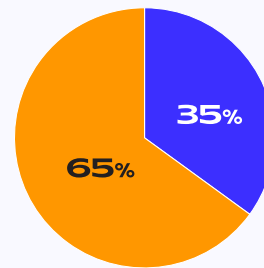
Upgraded BB tier during pandemic



US



UK



Germany

■ Yes ■ No

How much extra per month for upgraded homes

■ \$/€/£ 1-4 ■ \$/€/£ 5-7 ■ \$/€/£ 8-10 ■ \$/€/£ 10+





Willingness to upgrade for better Wi-Fi

Let's take a closer look at consumers who haven't upgraded during pandemic.

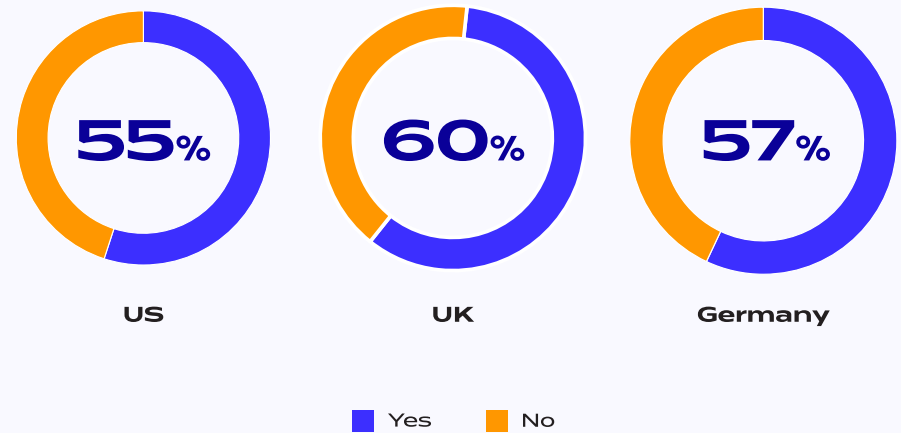
58%

indicated they would upgrade to a higher tier of broadband if it included a premium Wi-Fi system that guaranteed faster and more consistent Wi-Fi in every room.

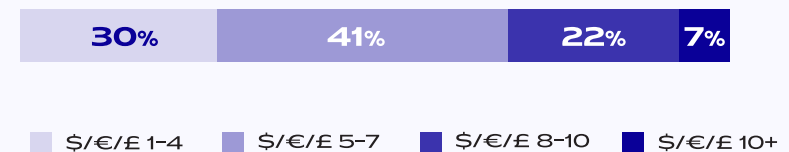
This number is consistent across all markets.

Similarly to those who already upgraded, **70%** are willing to spend at least \$5/€5/£5 per month for better Wi-Fi

Willingness to upgrade for premium Wi-Fi



Willingness to pay extra for premium Wi-Fi





Offering a companion app – motivation

Interest is high across all regions in the functionalities that a companion app can bring; a strong majority of those questioned indicated that they would be interested in having one or more of the features listed if they didn't have it already.

63%

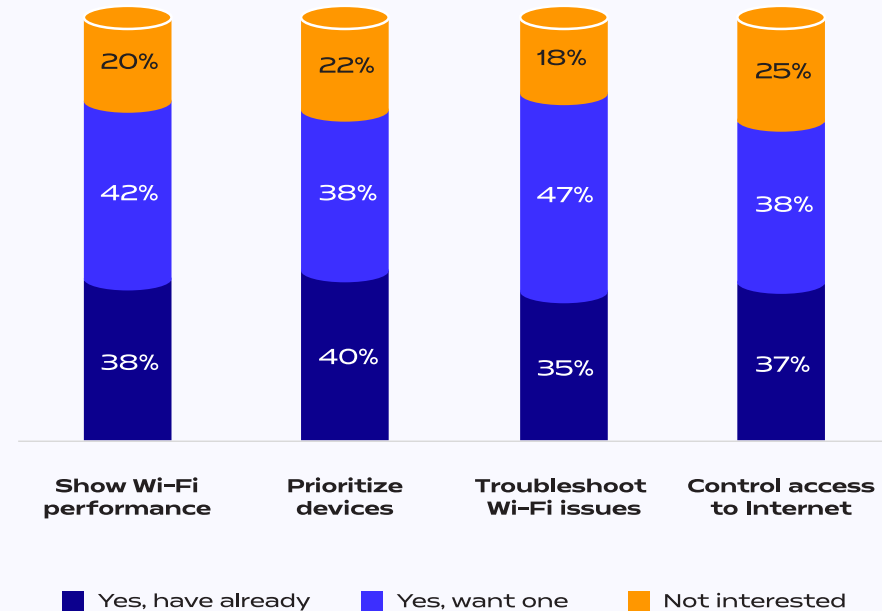
of respondents declare an interest in at least one of the features of a companion app.

Highest interest was for an app that would help identify and fix Wi-Fi issues without needing to contact their operator.

Only 35% of respondents already have this functionality, making it the largest untapped opportunity.

The ability to determine which devices get the best Wi-Fi connection at a given time seems to be the most deployed feature, with 40% of respondents already equipped.

Motivation for a companion app by functionality



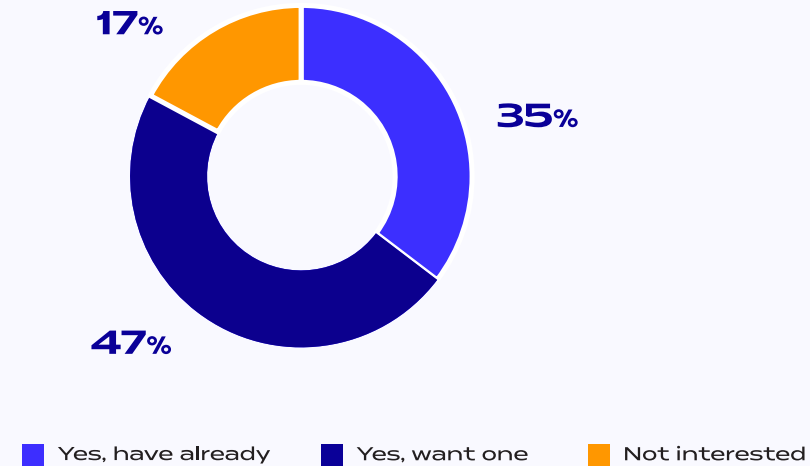


Offering a companion app to troubleshoot Wi-Fi issues

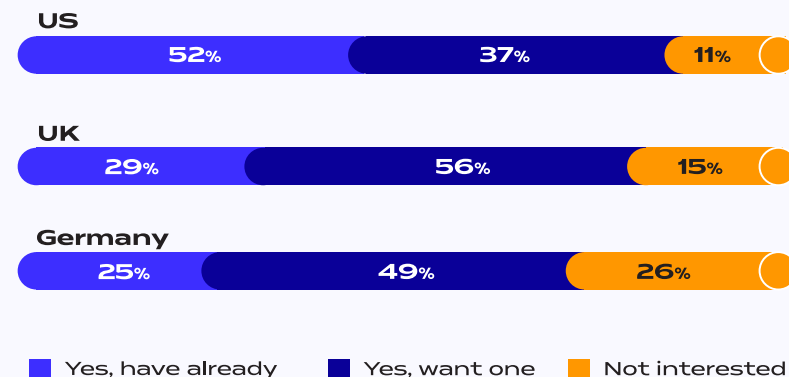
The survey clearly shows the troubleshooting functionality to be the most desired one, as consumers want to be able to identify and fix issues with their home Wi-Fi without having to contact their operator.

This is also a major untapped opportunity for operators, with as many as **56%** of Brits interested in such a feature, followed by **49%** of Germans.

Interest for a companion app to troubleshoot Wi-Fi issues



Interest for a companion app to troubleshoot Wi-Fi issues by market:





Offering a companion app to show Wi-Fi performance

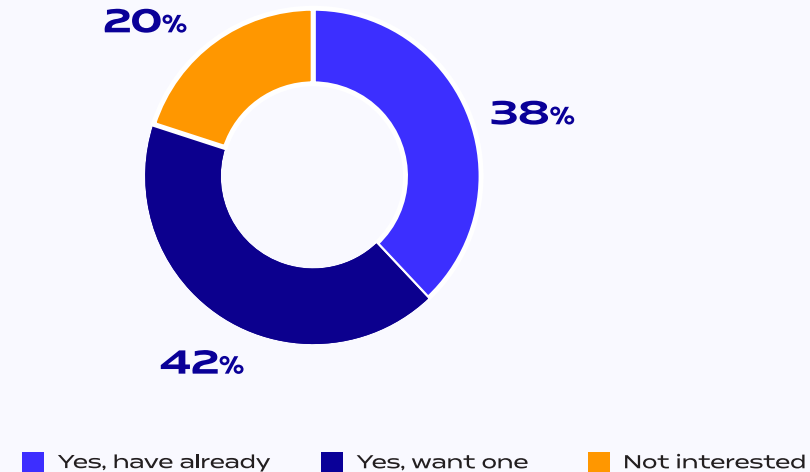
When asked if they would like an app that shows the Wi-Fi performance of devices in the home, **80%** responded yes - just under half of whom already have such a feature.

But when the data is broken out by market, it is interesting to see the clear advance in the US, where **57%** are already equipped, and the untapped opportunity for broadband operators in Germany and the UK

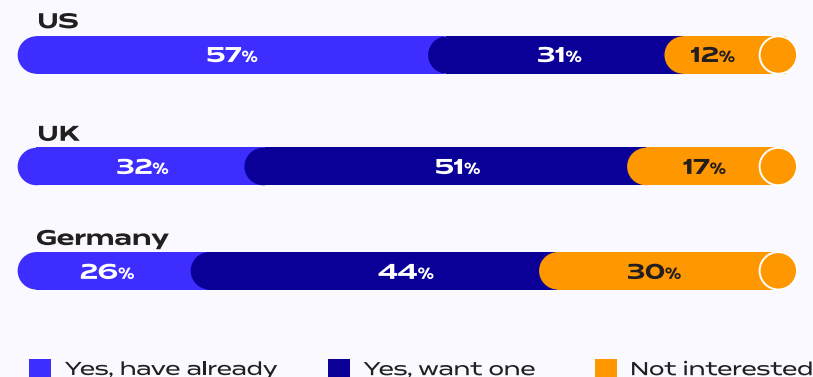
Tapping into interest for a companion app to show Wi-Fi performance:

51% of consumers in UK are interested in such a feature and do not have one already, followed by **44%** of Germans.

Interest for a companion app to show Wi-Fi performance



Interest for a companion app to show Wi-Fi performance by market:

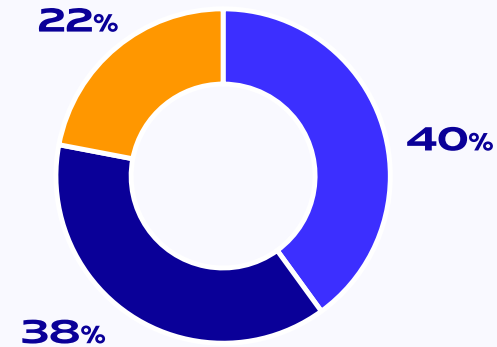




Offering a companion app to prioritize devices

78% of respondents are interested in an app that allows them define which devices get the best connections.

Interest for a companion app to prioritize devices

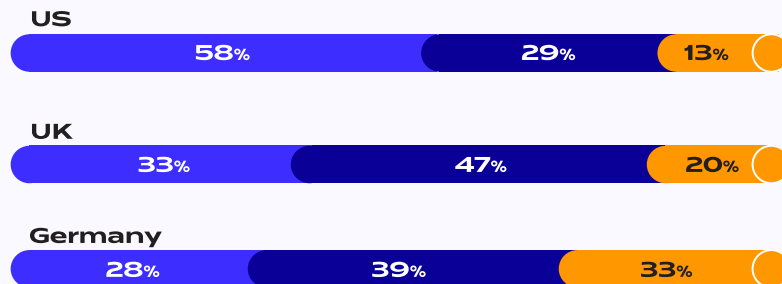


■ Yes, have already ■ Yes, want one ■ Not interested

Tapping into interest for a companion app to prioritize devices:

The largest opportunity seems to be in the UK, where **47%** of consumers are interested in such a feature, followed by **39%** of Germans.

Interest for a companion app to prioritize devices by market:



■ Yes, have already ■ Yes, want one ■ Not interested

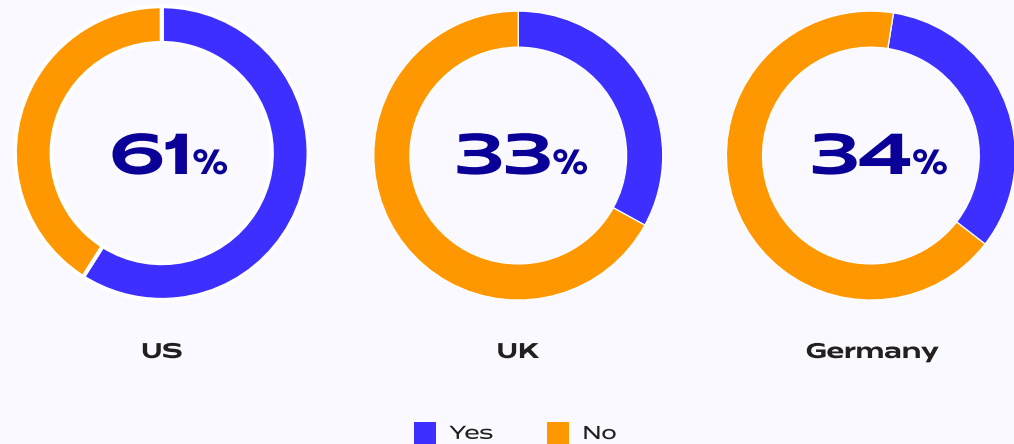


Offering advanced security features

43%

on average currently pay extra for broadband access that includes advanced security, but differences between the US and European markets are significant, with over **60%** of Americans already paying for this kind of service, compared to **1/3** of consumers in the UK and Germany.

Paying extra for advanced security features



Among the consumers who do not already pay extra for advanced security,

64%

on average prefer the operator to include advanced security features as part of the broadband package rather than pay extra.

This tendency is the strongest in Germany, with **74%** of respondents.

Consumer expectations for advanced security as part of the package.



About Airties

Airties is the most widely deployed provider of managed Wi-Fi solutions to operators around the globe. Airties Smart Wi-Fi portfolio includes Airties Edge, smart Wi-Fi software for gateways; Airties Cloud, a cloud-based management platform and its companion app, Airties Vision; and Wi-Fi mesh extenders. Operators turn to Airties for the design, implementation, and ongoing optimization of their customers' broadband experience. Some of Airties' customers include Altice USA, AT&T, Singtel, Sky, Telia, Telstra, Vodafone, and many others. More information is available at:

www.airties.com

