



# Opportunities for fixed broadband operators in the connected home



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## About this report

This report assesses how fixed broadband providers can add value to their connectivity services by incorporating services related to consumers' in-home connectivity. We refer to these services collectively as 'connected home services' and have identified three categories: improved home Wi-Fi, smart home services and additional Wi-Fi functions.

The report provides recommendations for how providers can include these services in their fixed broadband retail offerings to limit churn and to maintain ARPU in competitive markets.

It is based on several sources:

- Analysys Mason's internal research
- Data from Analysys Mason's 2022 *Consumer survey*
- Interviews conducted with fixed broadband providers in April and May 2023.



### KEY QUESTIONS ANSWERED IN THIS REPORT

- How should operators market their improved home Wi-Fi services to customers?
- How should operators price their home Wi-Fi services and the associated customer premise equipment?
- Should services related to the connected home be seen as a means of generating revenue outside of core telecoms services or as a way for operators to reinforce their existing connectivity services?



### WHO SHOULD READ THIS REPORT

- Strategy and product teams in fixed broadband operators worldwide that want help with formulating retail propositions to monetise their network investments.
- Investors that want to understand how fixed broadband operators can drive subscriber take-up and ARPU.
- Vendors that are trying to understand how fixed broadband operators are approaching consumer Wi-Fi and smart home services.



**Executive summary**

Research overview

Improved home Wi-Fi





Smart home services

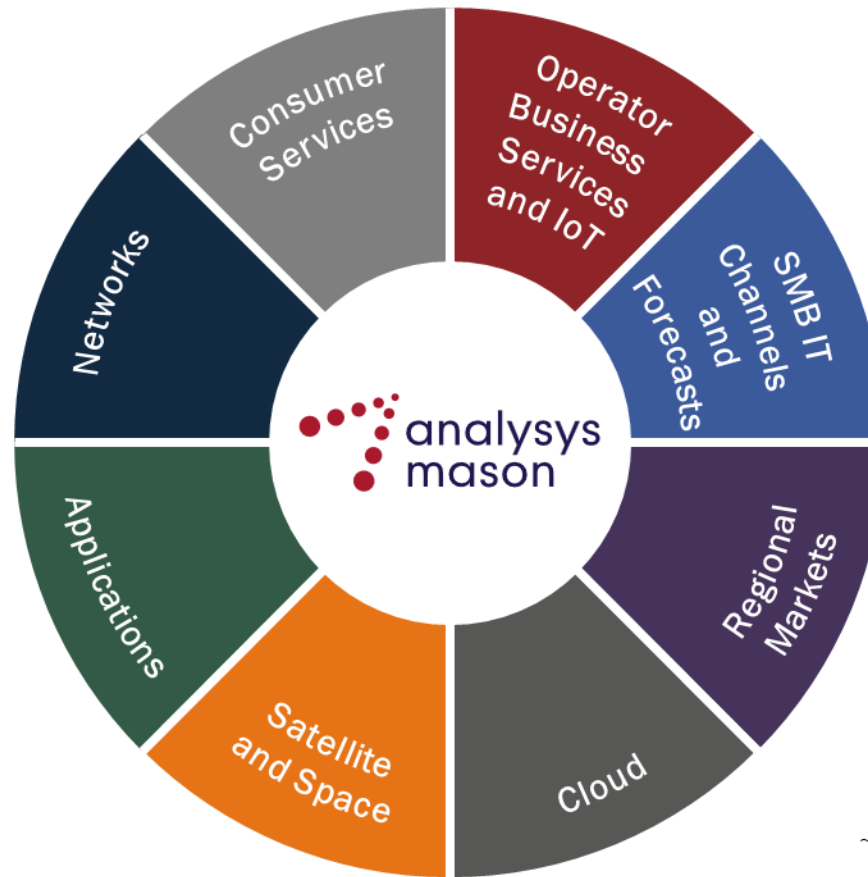
Additional Wi-Fi functions

Appendix

About the author and Analysys Mason

# Our research services

- 
**Consumer Services**  
 Fixed Broadband Services  
 Mobile Services  
 Fixed-Mobile Convergence  
 Smart Devices  
 Future Comms  
 Video, Gaming and Entertainment
- 
**Networks**  
 Next-Generation Wireless Networks  
 Wireless Infrastructure Strategies  
 Fibre Infrastructure Strategies  
 Operator Investment Strategies  
 Telecoms Strategy and Forecast  
 Transport Network Strategies
- 
**Applications**  
 Network Automation and Orchestration  
 Customer Engagement  
 Monetisation Platforms  
 Digital Experience  
 Automated Assurance  
 Service Design and Orchestration  
 Telecoms Software Market Shares
- 
**Satellite and Space**  
 Satellite Communications  
 Space Applications and Infrastructure



## Operator Business Services and IoT

- Enterprise Services
- SME Services
- IoT Services
- Private Networks



## SMB IT Channels and Forecasts

- Cyber Security
- SMB Technology Forecaster



## Regional Markets

- Global Telecoms Data and Financial KPIs
- Americas
- Asia-Pacific
- Middle East and Africa
- European Core Forecasts
- European Telecoms Market Matrix
- European Country Reports



## Cloud

- Cloud Infrastructure Strategies
- Data, AI and Development Platforms
- Edge and Media Platforms
- Multi-Cloud Networking



## DataHub

- ~2800 forecast and 280+ historical metrics
- Regional results and worldwide totals
- Operator historical data



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