



The imperative of constant connectivity

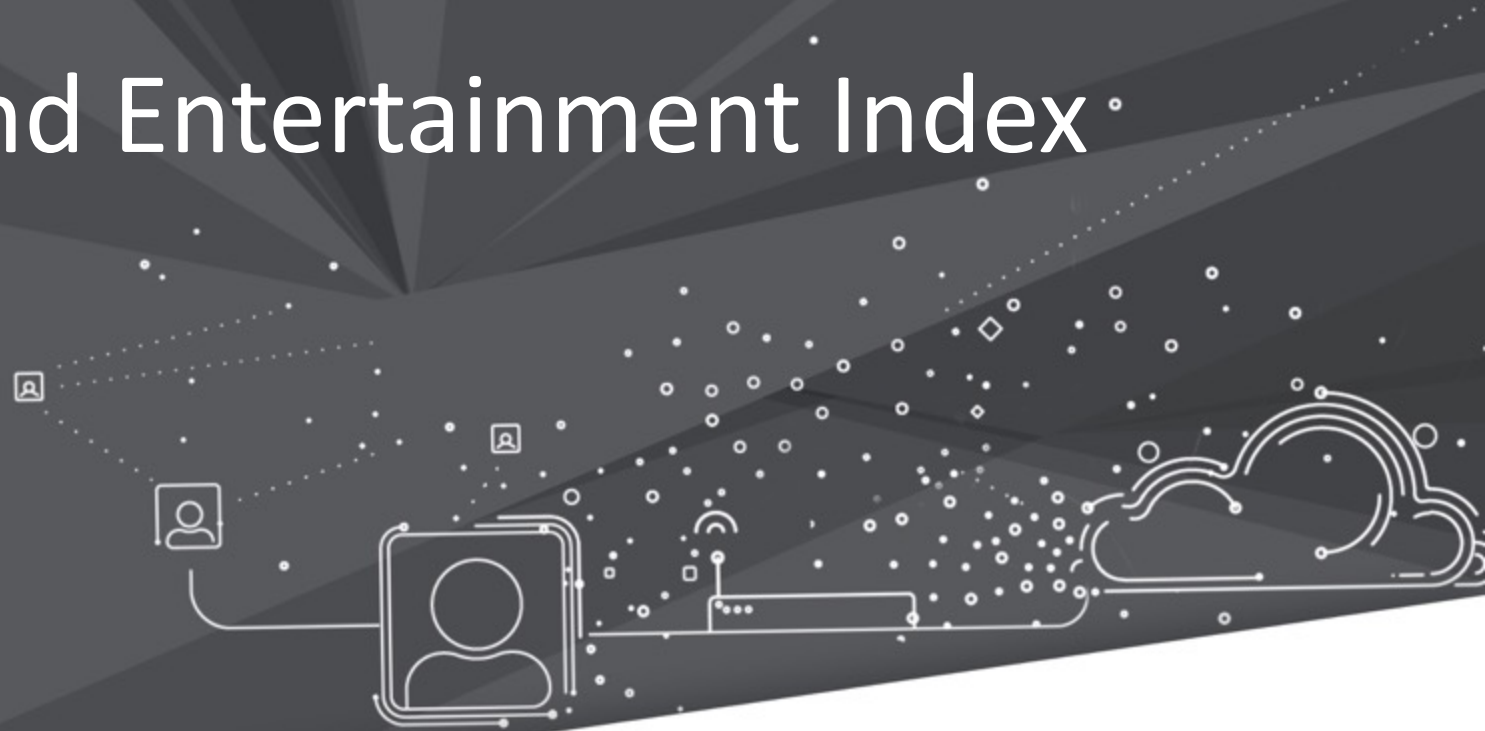
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CEI: Connectivity and Entertainment Index



ARRIS CEI and European connected consumers



1

Consumers are redefining their expectations around connectivity

84% believe constant connectivity is important

63% Believe it is changing our lives for the better... but not without security, privacy or dependence concern

2

We are connecting ever more devices (EU average: 7 Wi-Fi connected devices)

Home Wi-Fi is essential: More video, more streaming and connected TVs are in the majority of homes

33% Subscribers blame their service provider for Wi-Fi issues

The modem/router is the gateway not just to services but customer satisfaction

3

Whether home or away - we want fast, reliable, secure experiences

Subscribers are looking to service providers to deliver it

	France	Germany	Spain	Sweden	UK
Consumers that want constant connectivity and say it is important	79%	86%	85%	82%	84%
2-4 people in household	73%	72%	83%	67%	74%
1 person in household	8%	24%	9%	27%	20%
Children in household	53%	40%	55%	48%	41%
Suburbanites/City dwellers	22/48%	21/49%	13/75%	23/55%	49/30%
Rural	30%	21%	11%	22%	21%
Live in home with 3 bedrooms	33%	17%	52%	24%	43%
Employed full-time	48%	46%	49%	45%	42%
Early adopters	13%	11%	14%	9%	9%

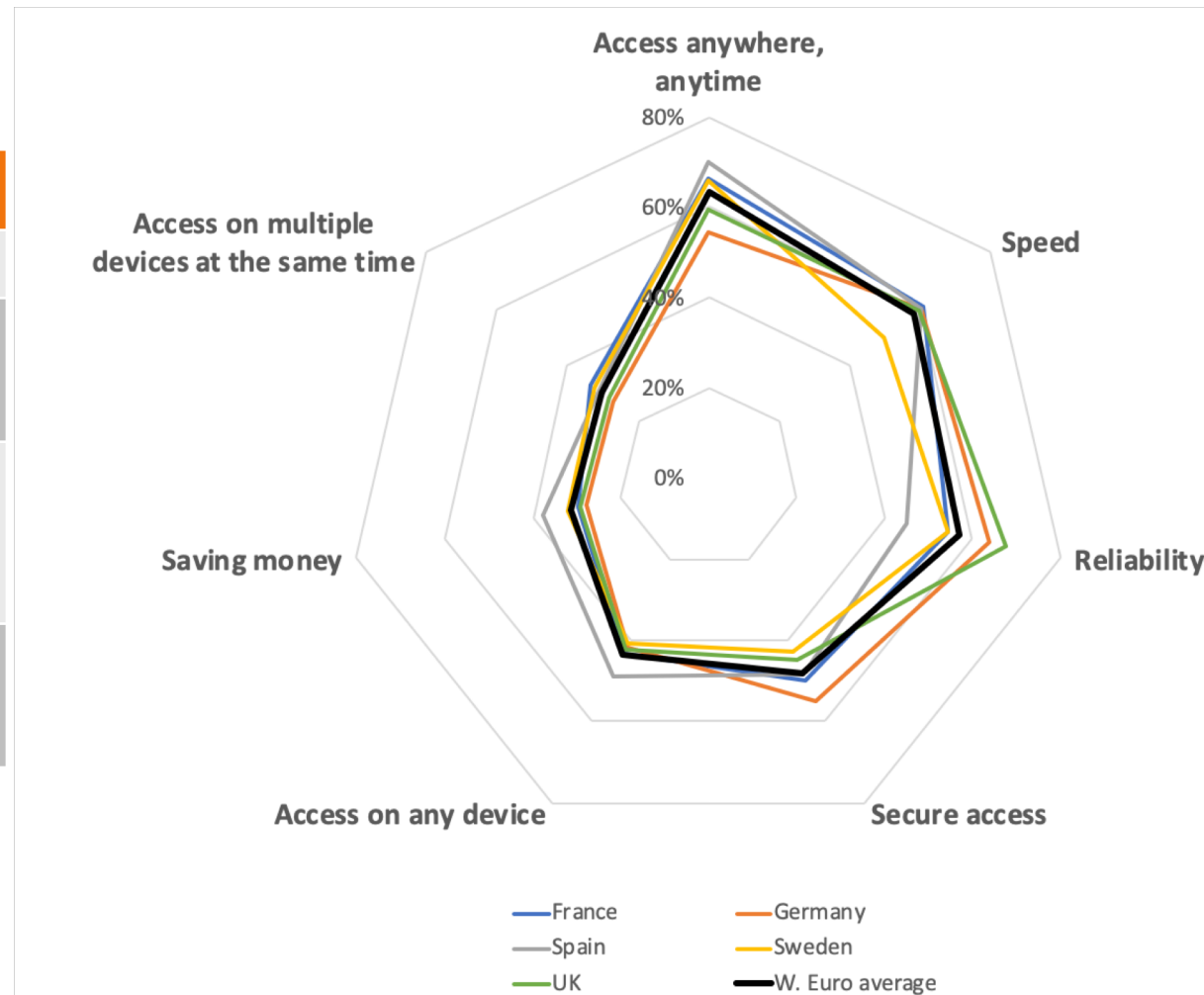
1000 respondents per country

What constant connectivity means to consumers

What does the term 'constant connectivity' mean to you?

	France	Germany	Spain	Sweden	UK
Contactable 24/7	41%	38%	28%	47%	48%
Ability to access information anywhere any time	54%	50%	59%	62%	48%
Seamless access to online content on any device, at any time anywhere	50%	46%	43%	26%	43%
Technologies that are compatible with each other	14%	14%	8%	14%	12%

What would be the features?

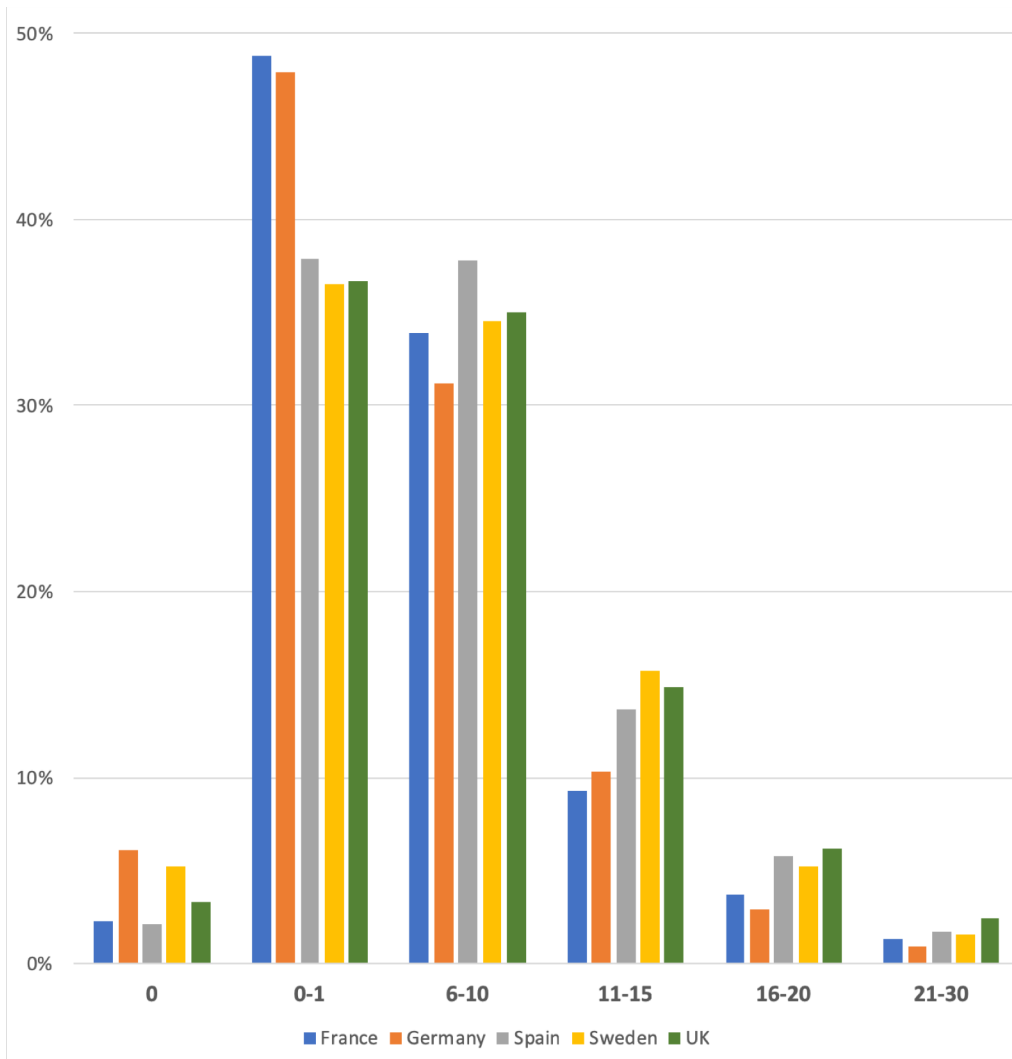




Constant connectivity
in the Wi-Fi home

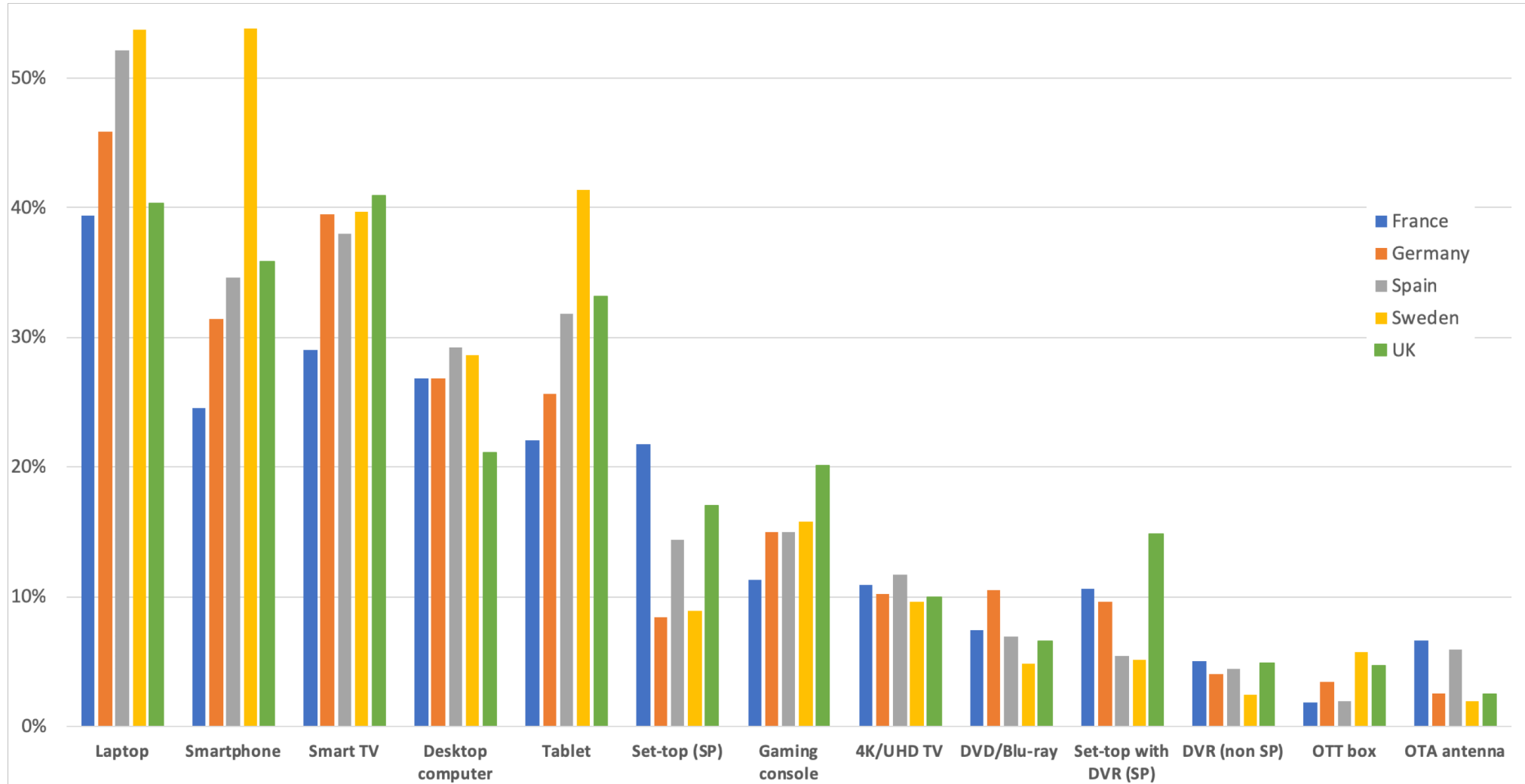
The Wi-Fi network is busy: 7 connected devices

How many devices are connected to WI-Fi?

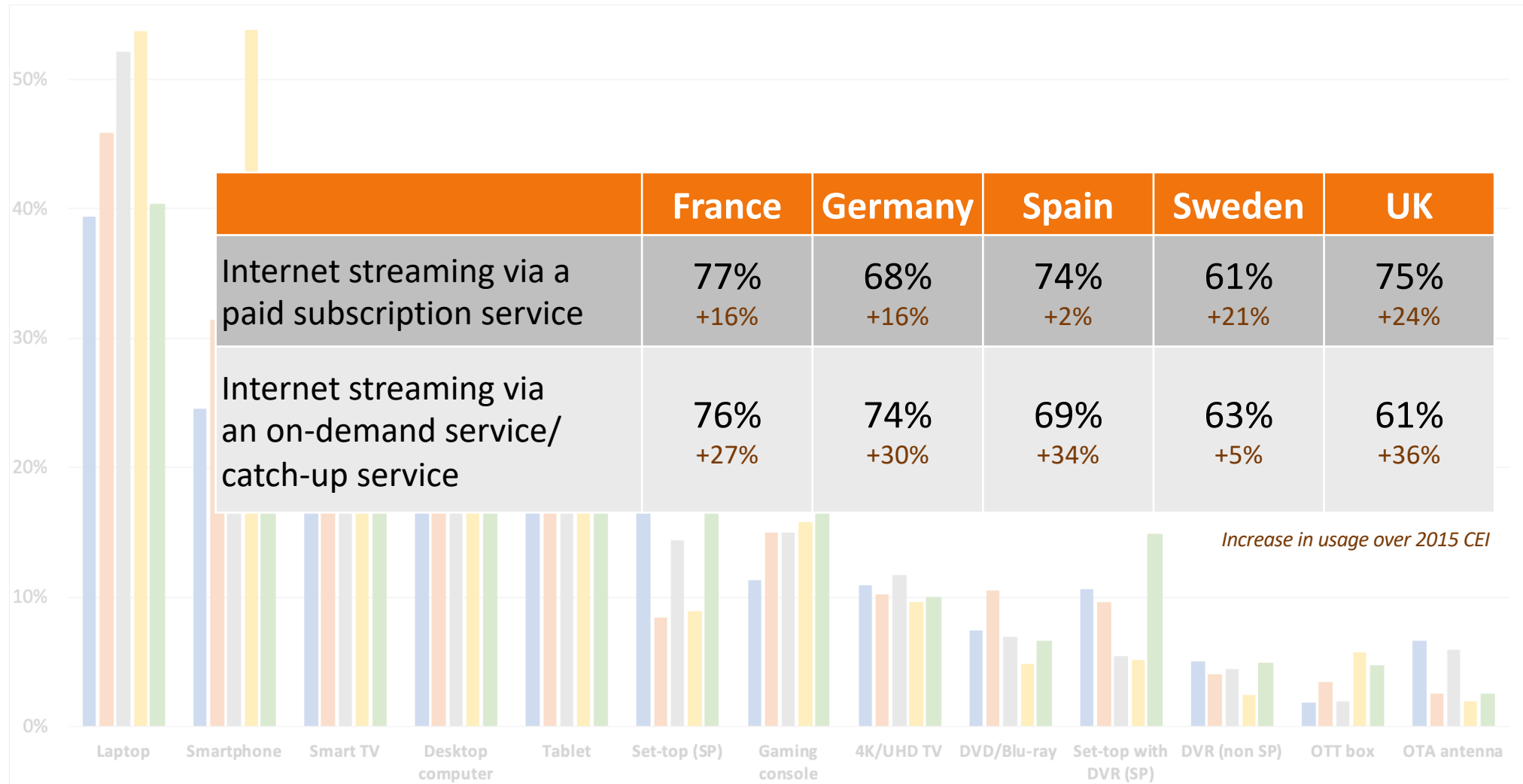


	France	Germany	Spain	Sweden	UK
Tablet	93%	94%	91%	93%	92%
Laptop/notebook	92%	93%	90%	94%	91%
Smartphone	92%	92%	90%	93%	92%
Desktop	85%	87%	80%	87%	82%
Smart TV/Connected TV	82%	81%	81%	82%	79%
4K/UHD TV	75%	75%	74%	74%	72%
Gaming console	72%	74%	68%	71%	69%
Connected security cameras	72%	74%	70%	75%	71%
Set-top + DVR	71%	69%	73%	69%	67%
Set-top	71%	77%	72%	66%	63%
Smart assistant	70%	69%	76%	64%	64%
Wi-Fi dongle	66%	72%	59%	60%	70%
Media streamer	61%	65%	58%	60%	59%
Other connected devices	58%	57%	57%	52%	64%
Connected appliances	57%	64%	58%	47%	51%
DVR	45%	54%	45%	35%	40%
DVD/Blu-Ray	39%	45%	38%	35%	34%

Streamers reshaping the TV experience

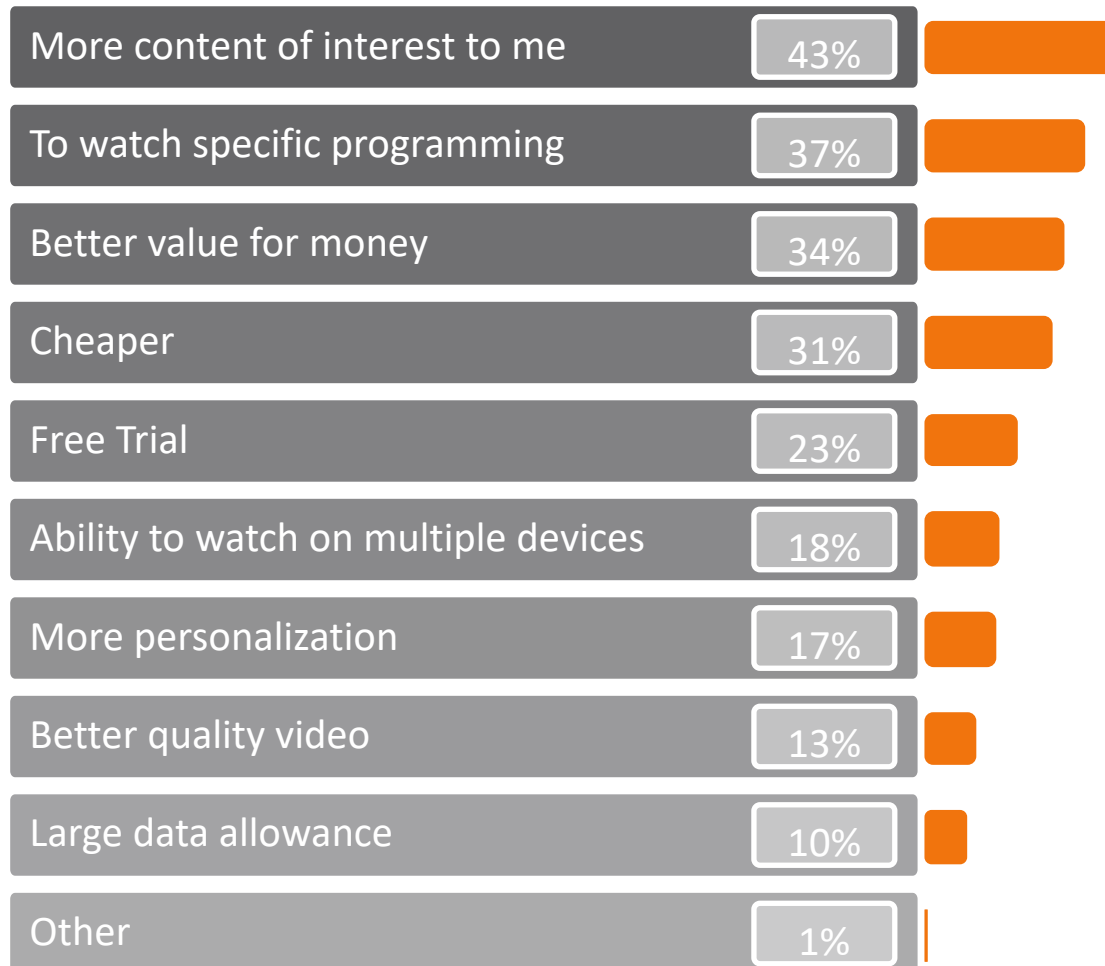


Streamers reshaping the TV experience

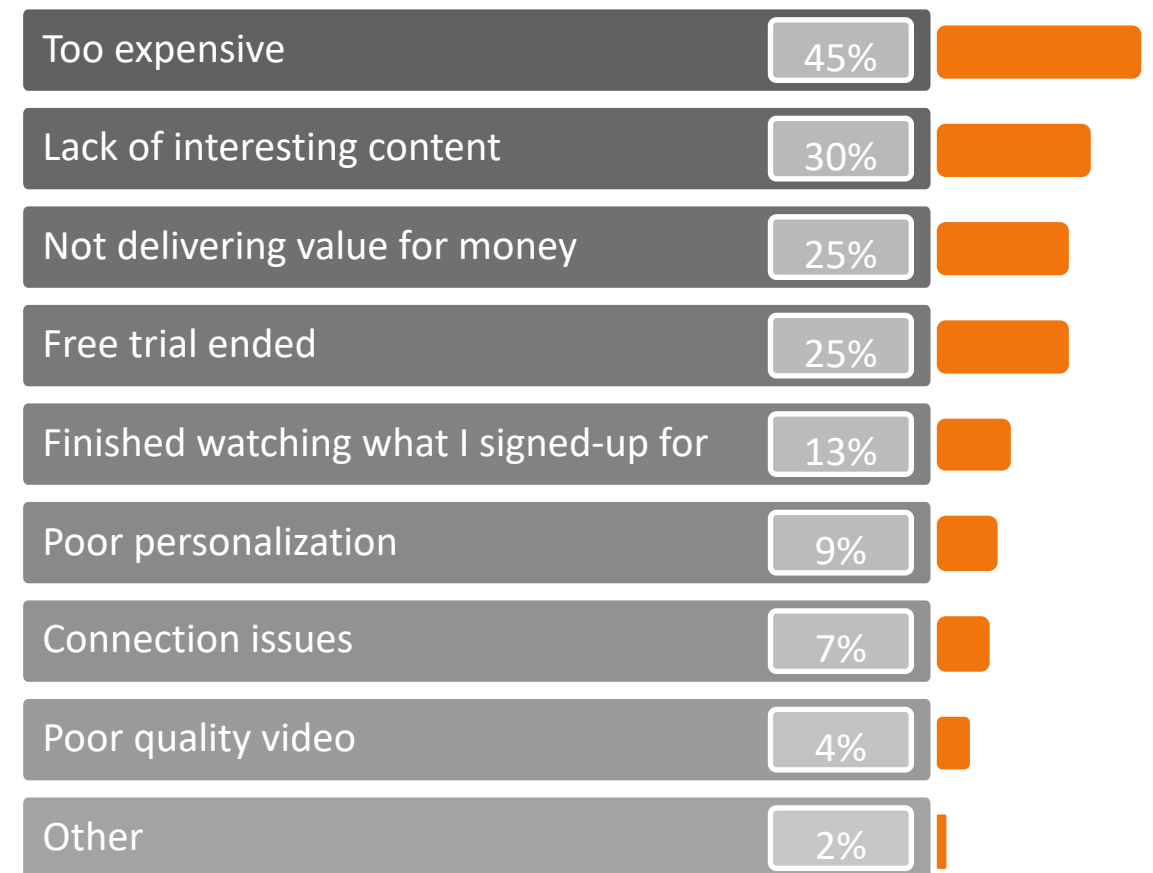


Falling in and out of love with streaming services

why people sign up...



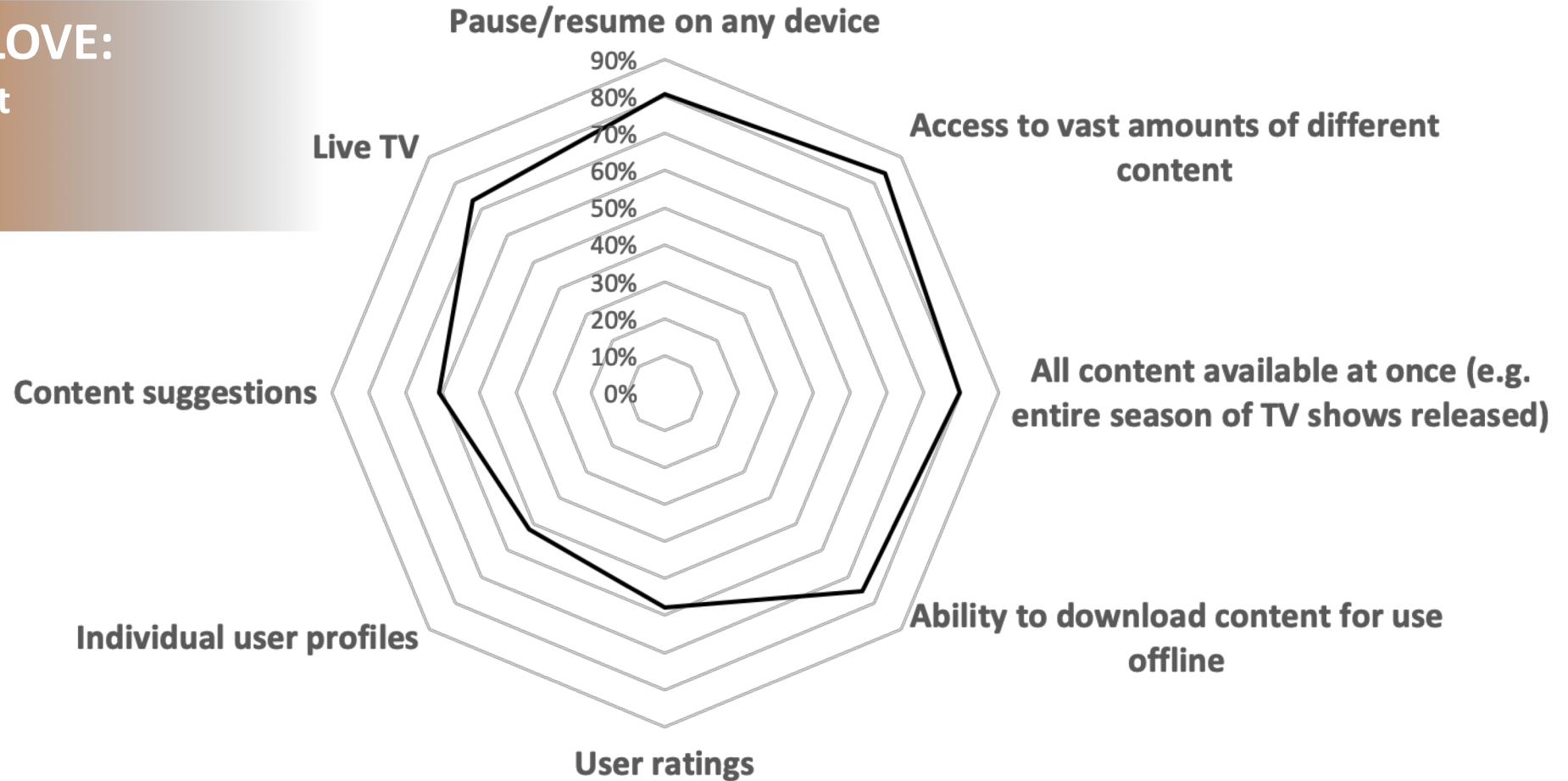
...and why they walk-away



People love access to the vast amounts of content available on streaming services

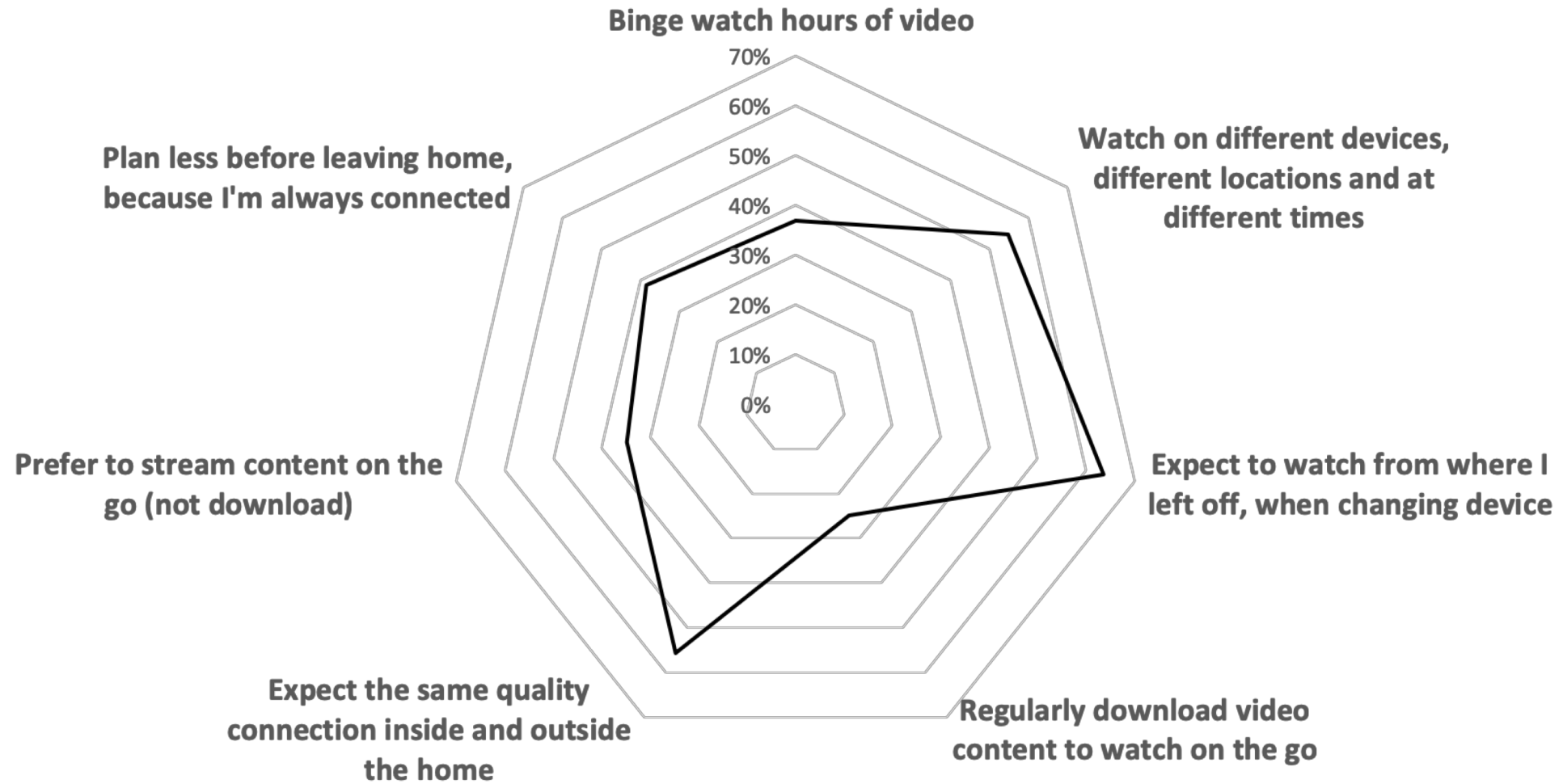
PEOPLE MOST LOVE:

1. Breadth of content
2. Availability of
3. Content mobility



BUT DON'T IGNORE LIVE TV

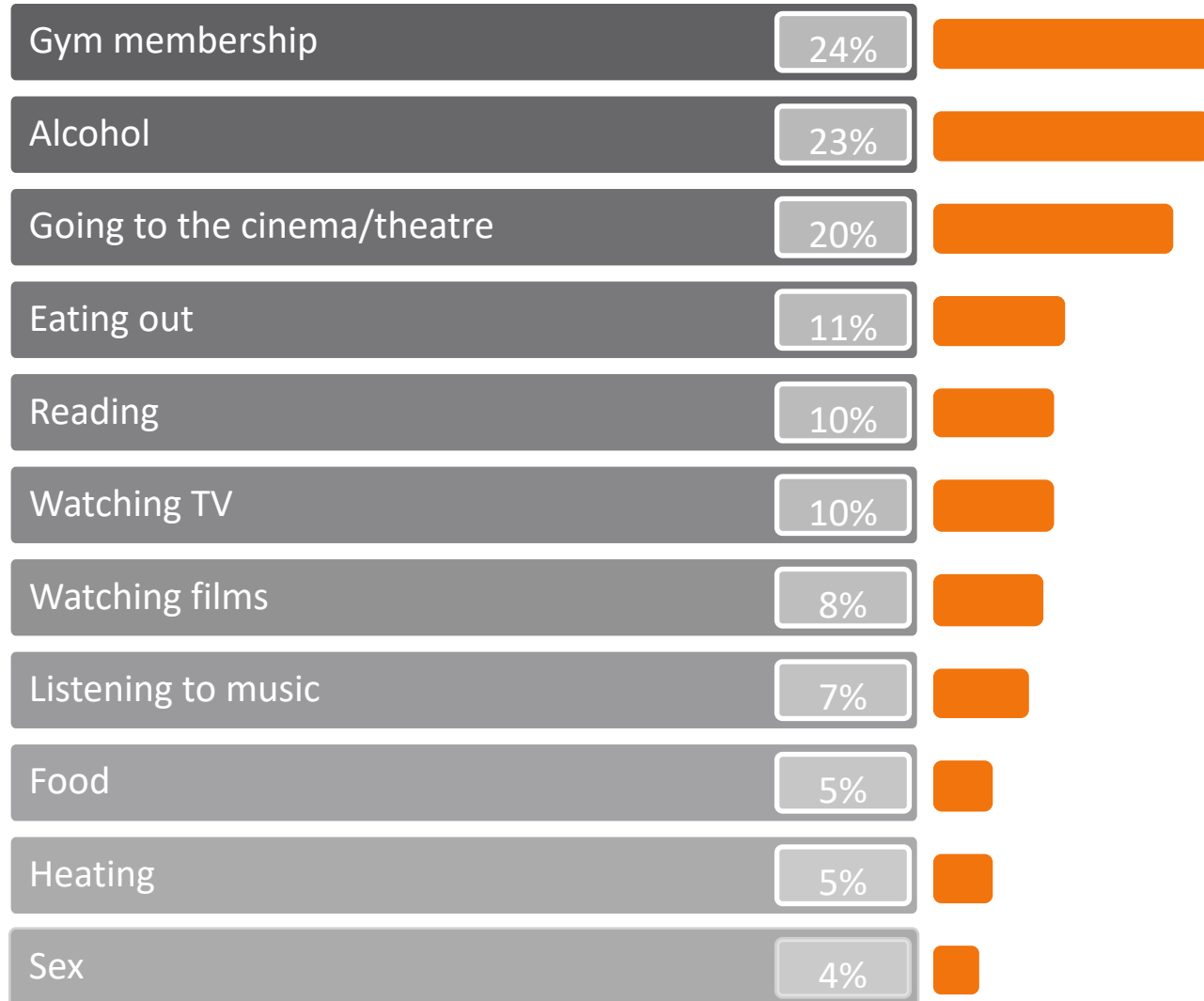
And convenience is key: device and content mobility combined with robust connection



Wi-Fi really matters to people...



But those who would, look to give up...

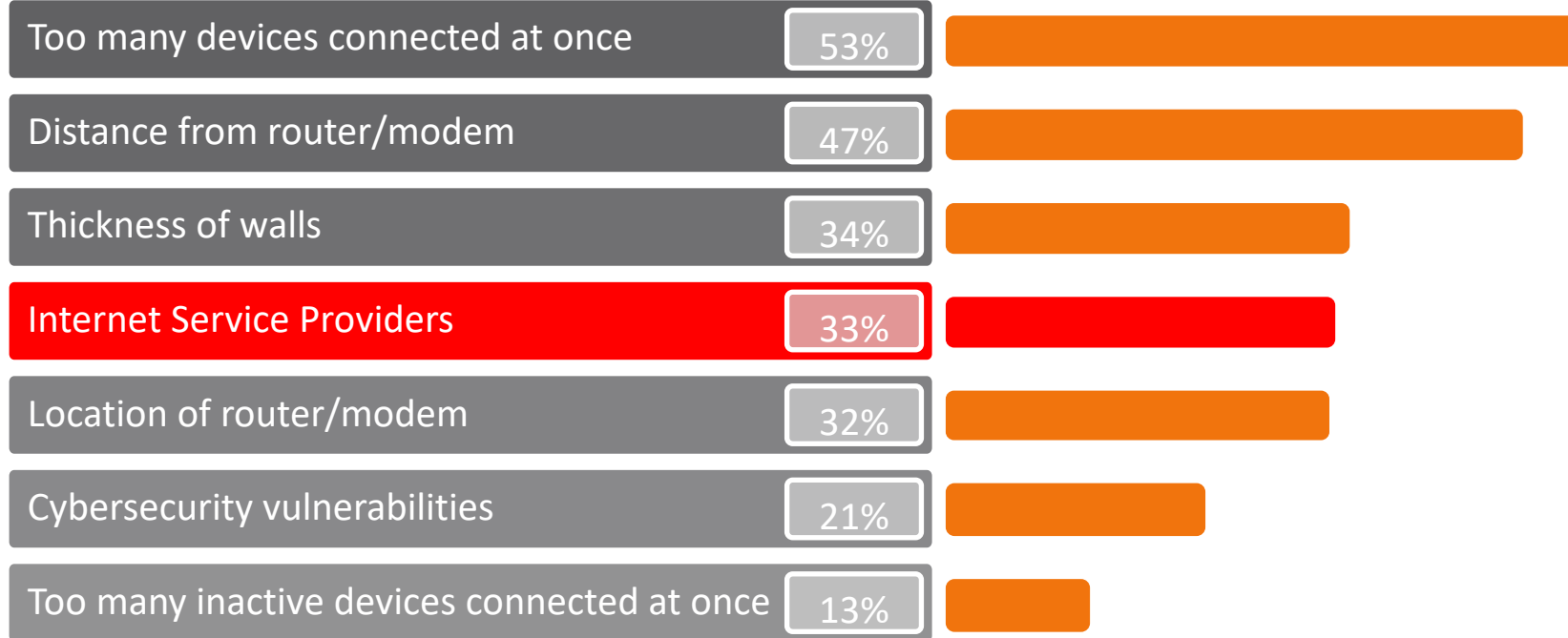


44%
would not
sacrifice
anything for
perfect Wi-Fi

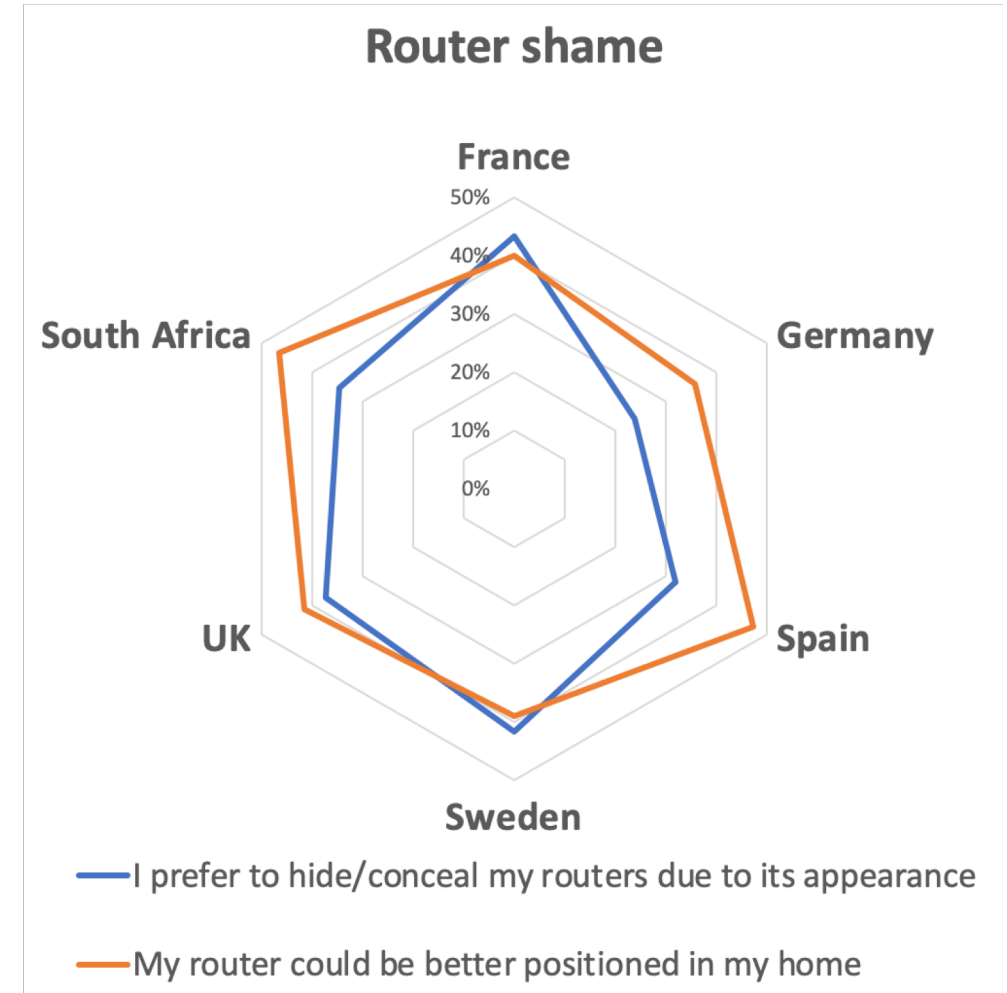
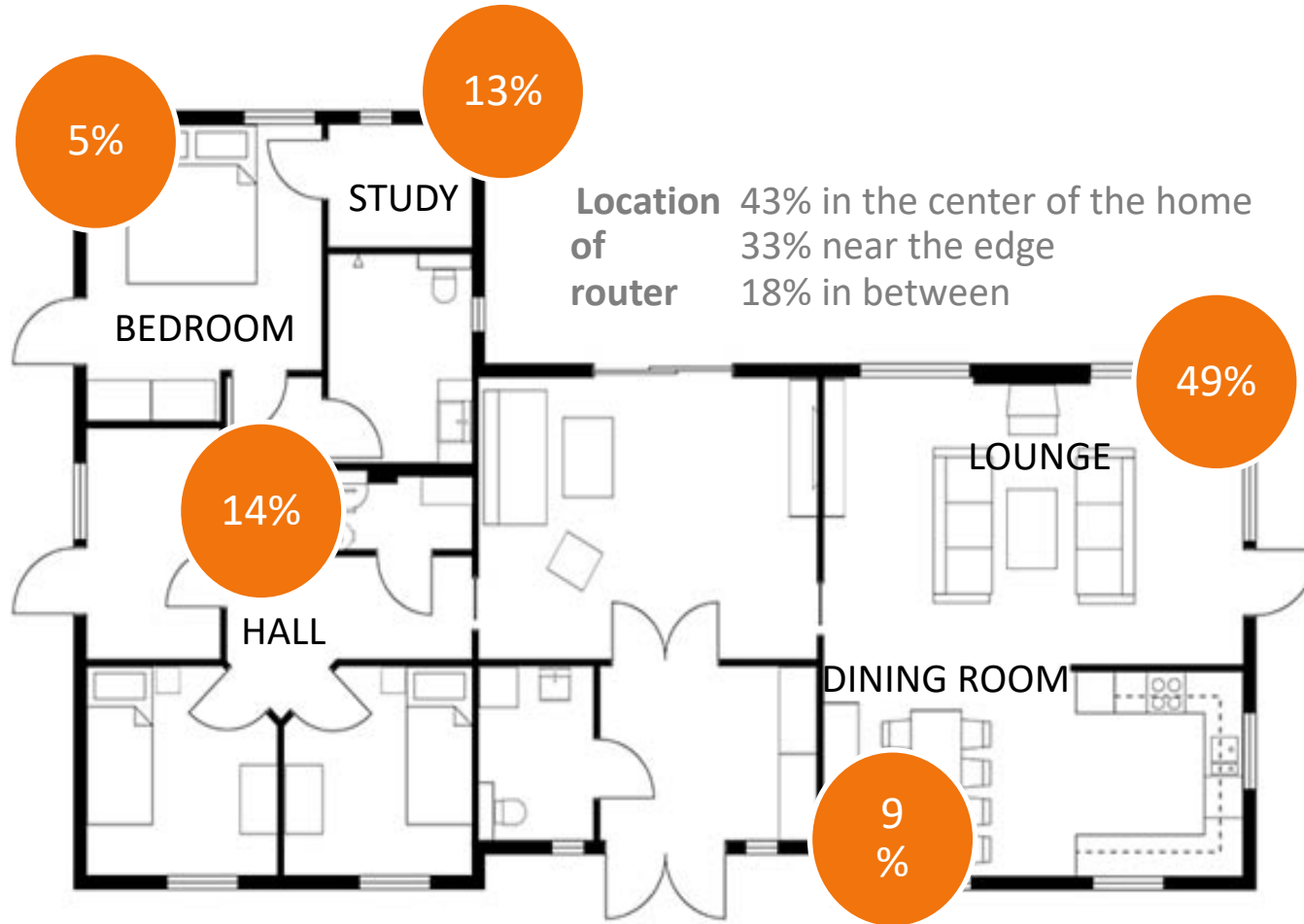
Consumers think Wi-Fi issues are caused by:



Consumers have many theories with **one third** blaming you directly...



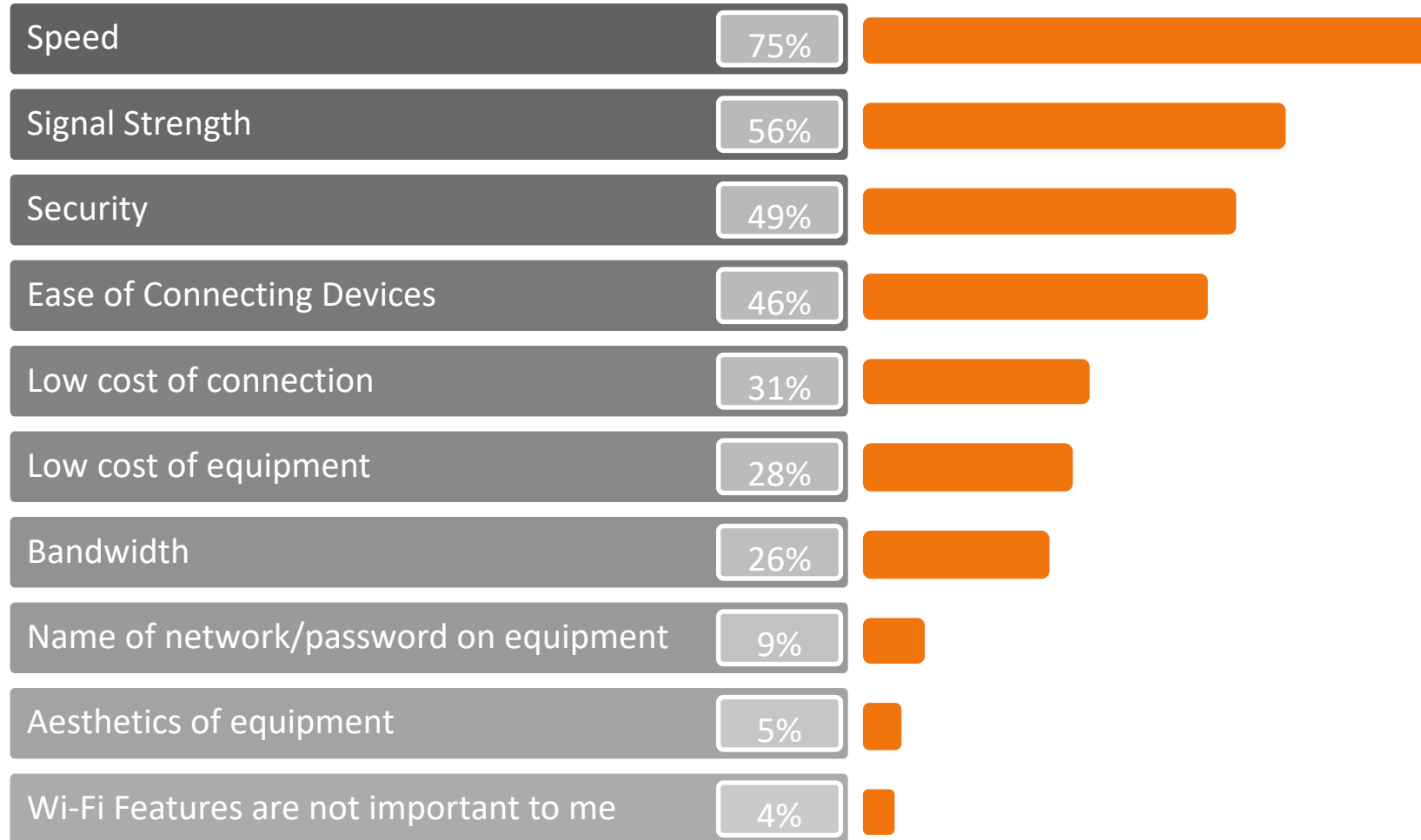
Connected homes start at the gateway



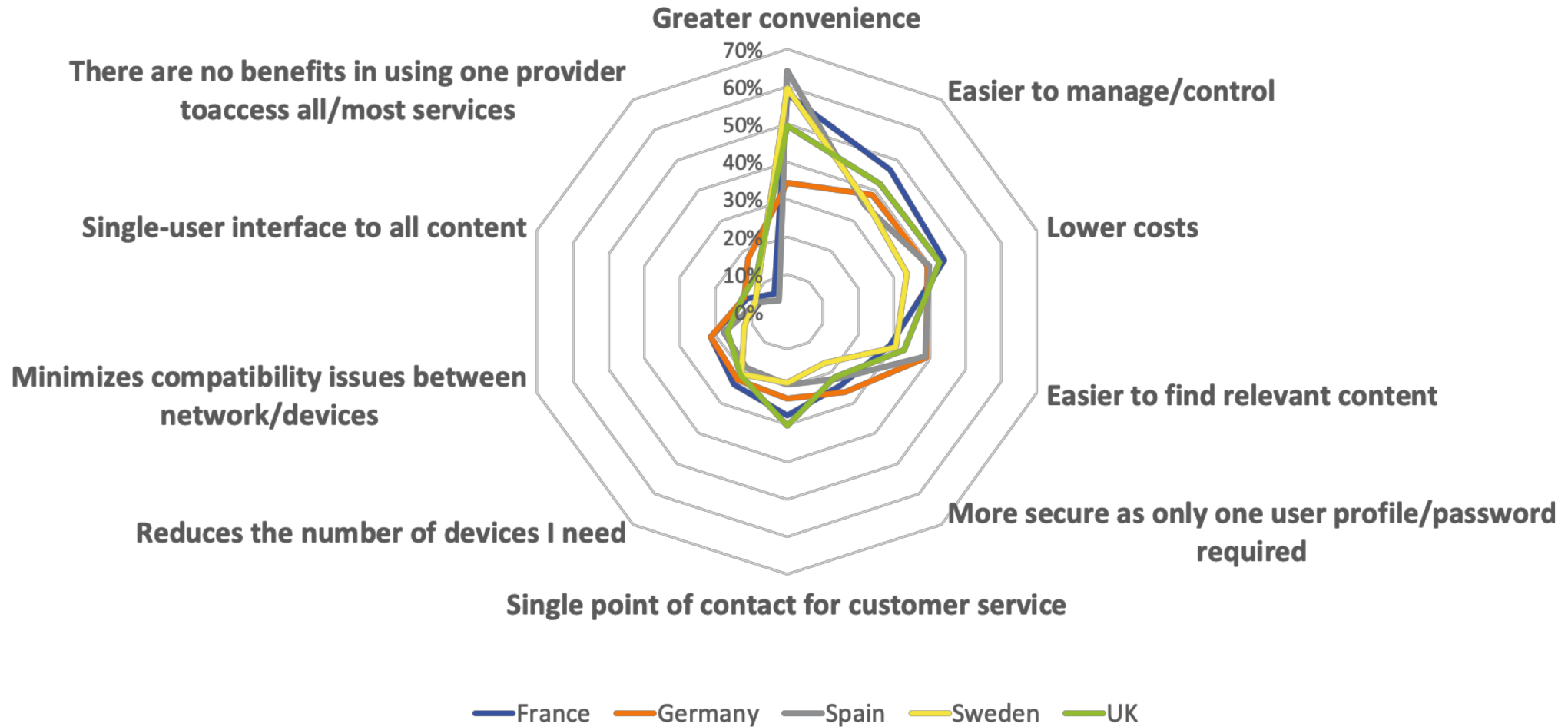
When it comes to the gateway, people want more than just speed...



Coverage, security and simplicity are extremely important



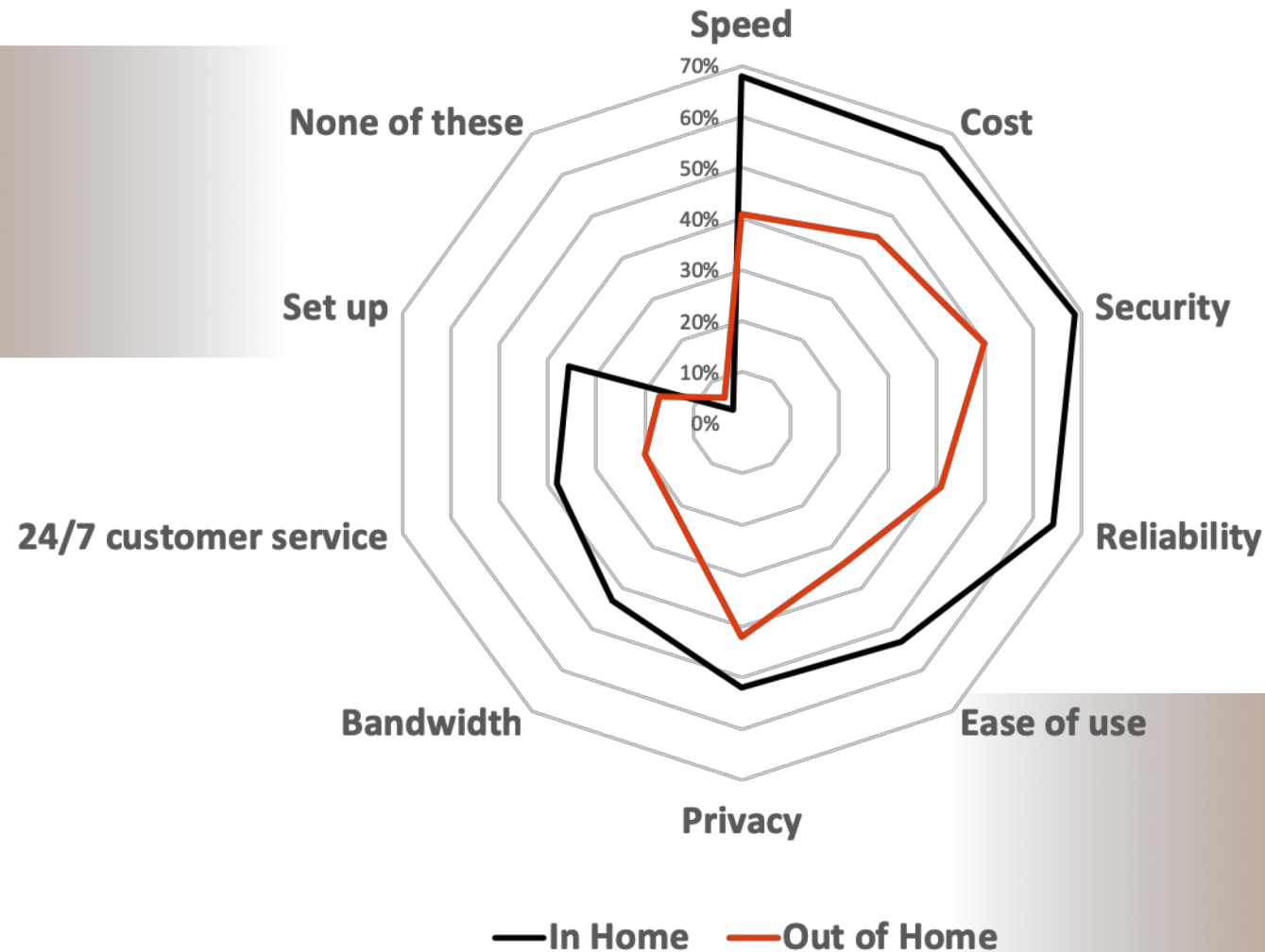
People expect a frictionless experience of constant connectivity



Service expectations in and out of home

IN-HOME:

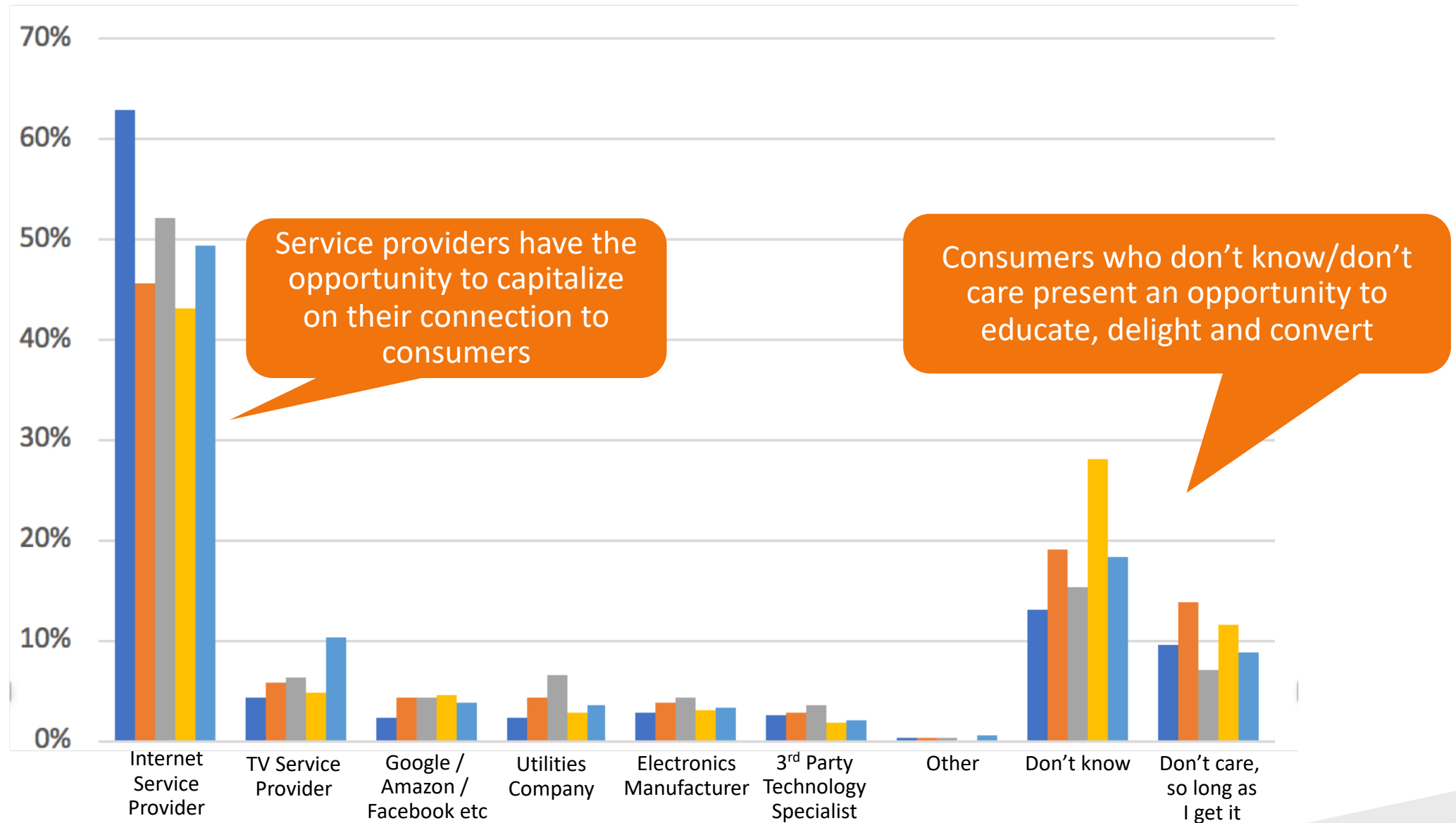
1. SPEED
2. COST
3. SECURITY
4. RELIABILITY



OUT-OF HOME:

1. SECURITY
2. COST
3. SPEED
4. PRIVACY

Who will drive constant connectivity?



Key take-aways

1

Consumers want speed but also security and reliability when it comes to connectivity

2

Wi-Fi matters and needs to step up to meet the needs of the multi-device, video household

3

Consumers are looking to their service providers as enablers of constant connectivity

THANK YOU

Would you like to talk more?

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