

Home ISPs and Bundled Services - US - 2023

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This report looks at the following areas:

- Current and forecast sales of home communications services
- What's driving the market
- Key players and competitive strategies
- Home internet service type, connected devices and data demands, and bundled services trends
- Home internet satisfaction, attitudes toward home internet, loyalty and switching triggers

Growth in consumer spending on home communication services has been slow but steady and is forecast to continue in this manner over the next few years. The vast majority of US households subscribe to broadband internet access at home and internet service is firmly considered a utility, so many consumers expect commodity-based pricing for this essential service. This attitude keeps prices low for the consumer but also narrows profits for ISPs, which have invested upwards of \$100 billion on infrastructure upgrades in just the last three years. However, these upgrades have not gone unnoticed – 82% of subscribers are satisfied with their home ISP in 2023 and 45% are “very satisfied,” an eight percentage-point increase from 2021.

Consumer demand for ever faster high-capacity internet shows no signs of slowing down, with 67% of subscribers agreeing that speed is the most important quality they look for when shopping for home internet. ISPs need not only provide what consumers need now in terms of speed and cost but must stand five years ahead to ensure they remain competitive.



“Speed and reliability are the key factors consumers look for in home internet service. Price is important and more engaged consumers will work the system to create value themselves.”

– Jenni Nelson, Tech, Media and Entertainment Analyst

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