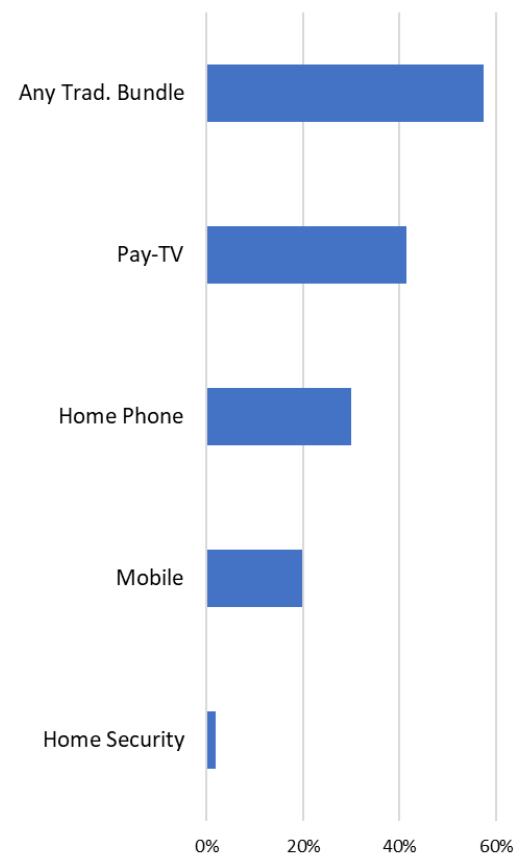
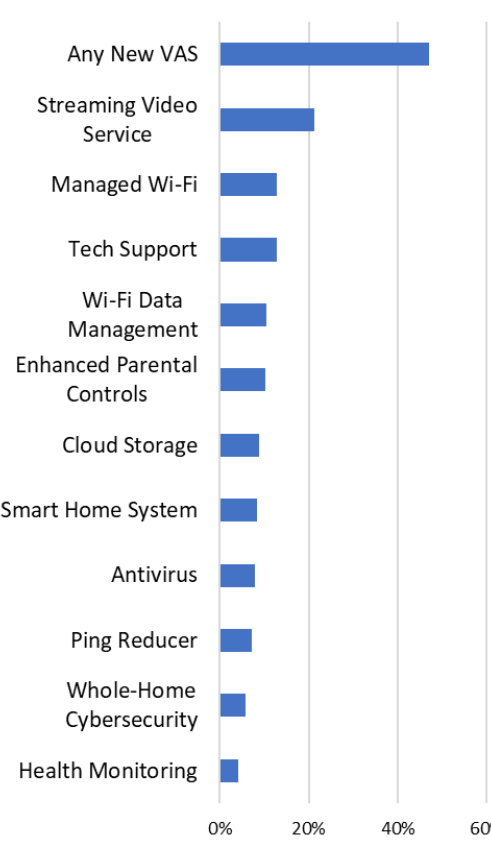


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By Kristen Hanich, Director, Research, Parks Associates

Synopsis	Adoption of Traditional and New Bundles																																							
<p>The broadband market is ripe for change as traditional services fully mature and participants seek to maximize profitability and new revenue streams. Consumers now value technology more than ever and are increasingly seeking out new applications including Wi-Fi services and various value-added bundled services. This report evaluates the most significant events and trends that impact the broadband industry including disruptive technologies, changing consumer trends, and the competitive landscape.</p>	<h3>Traditional Bundle Adoption</h3>  <table border="1"> <caption>Traditional Bundle Adoption Data</caption> <thead> <tr> <th>Bundle Type</th> <th>Adoption Rate (%)</th> </tr> </thead> <tbody> <tr> <td>Any Trad. Bundle</td> <td>~55%</td> </tr> <tr> <td>Pay-TV</td> <td>~40%</td> </tr> <tr> <td>Home Phone</td> <td>~30%</td> </tr> <tr> <td>Mobile</td> <td>~20%</td> </tr> <tr> <td>Home Security</td> <td>~5%</td> </tr> </tbody> </table>	Bundle Type	Adoption Rate (%)	Any Trad. Bundle	~55%	Pay-TV	~40%	Home Phone	~30%	Mobile	~20%	Home Security	~5%	<h3>New Bundle Adoption</h3>  <table border="1"> <caption>New Bundle Adoption Data</caption> <thead> <tr> <th>Service</th> <th>Adoption Rate (%)</th> </tr> </thead> <tbody> <tr> <td>Any New VAS</td> <td>~45%</td> </tr> <tr> <td>Streaming Video Service</td> <td>~20%</td> </tr> <tr> <td>Managed Wi-Fi</td> <td>~15%</td> </tr> <tr> <td>Tech Support</td> <td>~15%</td> </tr> <tr> <td>Wi-Fi Data Management</td> <td>~10%</td> </tr> <tr> <td>Enhanced Parental Controls</td> <td>~10%</td> </tr> <tr> <td>Cloud Storage</td> <td>~10%</td> </tr> <tr> <td>Smart Home System</td> <td>~10%</td> </tr> <tr> <td>Antivirus</td> <td>~10%</td> </tr> <tr> <td>Ping Reducer</td> <td>~10%</td> </tr> <tr> <td>Whole-Home Cybersecurity</td> <td>~10%</td> </tr> <tr> <td>Health Monitoring</td> <td>~10%</td> </tr> </tbody> </table> <p style="text-align: right;">© Parks Associates</p>	Service	Adoption Rate (%)	Any New VAS	~45%	Streaming Video Service	~20%	Managed Wi-Fi	~15%	Tech Support	~15%	Wi-Fi Data Management	~10%	Enhanced Parental Controls	~10%	Cloud Storage	~10%	Smart Home System	~10%	Antivirus	~10%	Ping Reducer	~10%	Whole-Home Cybersecurity	~10%	Health Monitoring	~10%
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<p><b>Publish Date:</b> 3Q 22</p>	<p>“Consumers are increasingly seeking out new bundles and services, including managed Wi-Fi services and bundles of home and mobile internet. Declining adoption of pay TV and home phone has driven declines of traditional bundling offers, but the rise of these new bundles, including of broadband value-added services, has more than offset these declines,” said Kristen Hanich, Director, Research, Parks Associates.</p>																																							

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	<p><b>Bottom Line</b></p> <p><b>Consumer Broadband Perspectives</b> Impact of Remote Work on Consumer Attitudes</p> <p><b>Service Bundling Opportunities</b> The Evolution of Pay TV Home and Mobile Internet Bundling Next-Generation Networking</p>

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<p><b>Figures</b></p>	<p>Market Share of Top Ten Residential Home Internet Providers            Penetration of Home Services (2017 to 2022)            Adoption of Standalone vs. Bundled Home Internet Service            Home Internet Download Speeds            Consumer Attitude Toward Home Internet Services            Attitudes Towards Home Internet by Demographic Segment            Consumer-Reported Spending on Home Internet            Remote Work Among US Internet Households            Consumer Willingness to Pay for Quality            Adoption of Traditional and New Bundles Among US Home Internet Households            Net Promotor Score of Internet Service Provider by Number of Value-Added Service Subscriptions            Adoption of Traditional and vMVPD Pay TV by Distribution Type            ISP Strategies for Pay-TV            Home &amp; Mobile Broadband Bundling Among Home Internet HHs            Certainty to Purchase Home Networking Products            Internet-Connected Device Ownership in US Home Internet HHs            Adoption of 5G/LTE Home Internet from MNOs            Internet Adoption in US Households</p>														
<p><b>List of Companies</b></p>	<table border="0"> <tr> <td data-bbox="451 1591 971 1623">AirTies</td> <td data-bbox="987 1591 1507 1623">Lumen</td> </tr> <tr> <td data-bbox="451 1629 971 1661">Altice USA</td> <td data-bbox="987 1629 1507 1661">Mediacom</td> </tr> <tr> <td data-bbox="451 1667 971 1698">Arise Broadband</td> <td data-bbox="987 1667 1507 1698">Netgear</td> </tr> <tr> <td data-bbox="451 1705 971 1736">AT&amp;T</td> <td data-bbox="987 1705 1507 1736">Shenandoah Telecommunications</td> </tr> <tr> <td data-bbox="451 1743 971 1774">Breezline</td> <td data-bbox="987 1743 1507 1774">Single Digits</td> </tr> <tr> <td data-bbox="451 1780 971 1812">Cable ONE</td> <td data-bbox="987 1780 1507 1812">TDS Telecom</td> </tr> <tr> <td data-bbox="451 1818 971 1850">Charter Spectrum</td> <td data-bbox="987 1818 1507 1850">Technicolor</td> </tr> </table>	AirTies	Lumen	Altice USA	Mediacom	Arise Broadband	Netgear	AT&T	Shenandoah Telecommunications	Breezline	Single Digits	Cable ONE	TDS Telecom	Charter Spectrum	Technicolor
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	Cincinnati Bell	US Cellular
	Comcast	Verizon
	Consolidated Communications	WideOpenWest
	DISH	Windstream
	Frontier	Wireless Broadband Alliance

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