

# 5G & Broadband Pricing and Strategy Intelligence Service

## Part of the Digital Consumer Services Service Area Package

Global, in-depth coverage of tariff innovation, bundling, and broadband monetization. Key trends tracked include 5G consumer pricing models and pricing, next-generation access go-to-market strategy, and new generation fixed bundles.

“ How to price and bundle 5G and super-fast broadband alongside new enriched services, such as AR, VR and cloud-gaming, is crucial to unlocking the up-sale of consumers to more expensive plans with higher speeds. ”

**Nicole McCormick**  
Practice Leader

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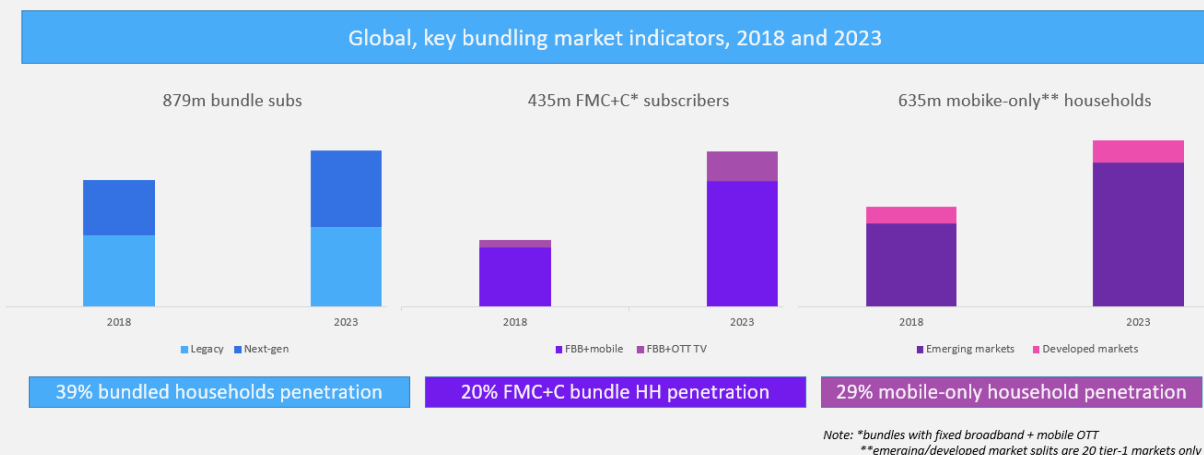
The global bundling potential will be a 900 million customer opportunity

## HOW OMDIA HELPS YOU

- Size the markets for next-gen access, fixed bundles, mobile-only and convergent consumers
- Identify new pricing models, including for 4G and 5G, and bundles
- Understand the latest strategies for upselling
- Leverage surveys and forecasts to better understand what the new consumer values and is willing to pay for

## KEY QUESTIONS ADDRESSED

- How are mobile pricing models evolving with 5G?
- Why do not all operators bundle 5G rich services, as part of a `Differentiate` strategy?
- How can service providers monetize their next-generation access investments?
- How has the fixed bundle moved beyond legacy services?
- What is the size of the fixed bundling market, and which bundles will emerge on top?
- Has mobile and fixed bundle tariff innovation slowed the decline in plan pricing?
- Does 5G fixed-wireless offer a wireline upgrade opportunity?
- How big will the `mobile-only` consumer segment get?



# 5G & Broadband Pricing and Strategy: Our Expert Analysts



**Michael Philpott**  
Research Director  
Service Provider Consumer

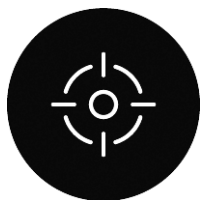


**Nicole McCormick**  
Practice Leader  
Broadband and Bundling



**Alzbeta Fellenbaum**  
Principal Analyst  
Broadband & Bundling

# 5G & Broadband Pricing and Strategy: Deliverables



## MARKET DATA

—Quarterly / biannually—

- Innovative pricing trackers
- Consumer demand forecasts



## SURVEYS

—Annual—

5G, Fixed and Mobile Bundling, and the Mobile-only Consumer



## REPORTS

—Ongoing—

5G Consumer Broadband Pricing  
Next-generation access go-to-market strategy



## ANALYST INSIGHTS

—Ongoing—

Analyst commentary on 4G, 5G and bundling monetization, in the form of opinions, client presentations, and in-depth reports



## MARKET FORECASTS

—Annual—

Bi-annual consumer mobile subscribers and revenue. Yearly 5-year forecasts on fixed bundling, and the mobile-only consumer



## ANALYST ACCESS

—Ongoing—

For prompt email and phone responses to urgent questions on related research and breaking trends.

# 5G & Broadband Pricing and Strategy: Market Data

## 5G Consumer Broadband Pricing Tracker

Tracks worldwide 5G plan details in the quarter they launch, including qualitative and quantitative data.

### DETAILS

**Frequency:** Quarterly

#### Measures

- Plan type
- Price
- Voice/SMS/data
- OTT and VAS
- 5G rich services
- Data overage & roaming

#### Regions

- Worldwide

### COVERAGE

#### 5G dataset

- Type (prepaid/postpaid, smartphone-plans only)

## Broadband Pricing Interactive Tracker

Mobile and fixed bundling plan type and inclusions for Omdia's Top 20 Tier 1 countries

### DETAILS

**Frequency:** Annual

#### Measures

- Plan/bundle type
- Price
- Voice/SMS/data/pay TV
- OTT and VAS
- Data overage & roaming

#### Regions

- North America (US, Canada)
- Europe (France, Germany, Italy, Russia, Spain, UK)
- Middle East (Saudi Arabia, Turkey)
- Africa (South Africa, Nigeria)
- Asia and the Pacific (Australia, China, India, Indonesia, Japan, Korea)
- Latin America (Mexico, Brazil)

### COVERAGE

#### Mobile dataset

- Type (4G/5G, prepaid/postpaid, plan or add-on, handset/non-handset)

#### Fixed dataset

- Type (dual-, triple-, or quad play)

# 5G & Broadband Pricing and Strategy: Market Data

## Broadband Bundle Subscription Forecast

This is a forecast of fixed broadband-centric bundled subscriptions.

### DETAILS

**Frequency:** Annual

#### Measures

- Bundled subscriptions
- Main bundle combinations
- Bundles with fixed voice
- Bundles with OTT video
- Bundles with mobile
- Bundles with pay TV

#### Regions

- Omdia's 67 tier 1 countries

### COVERAGE

#### Dataset

- Type (dual-, triple-, or quad play; next-generation bundles, including fixed broadband with mobile)

## Mobile-Only and Converged Broadband Forecast

To come in late 2020/ early 2021: forecasting the total internet access view, including the 'mobile-only' consumer, those with fixed mobile bundles, and those that take fixed and mobile but not in a bundle.

### DETAILS

**Frequency:** Annual

#### Measures

- Mobile-only
- Fixed-mobile bundlers
- Fixed-mobile non-bundlers

#### Regions

- North America (US, Canada)
- Europe (France, Germany, Italy, Russia, Spain, UK)
- Middle East (Saudi Arabia, Turkey)
- Africa (South Africa, Nigeria)
- Asia and the Pacific (Australia, China, India, Indonesia, Japan, Korea)
- Latin America (Mexico, Brazil)

### COVERAGE

#### Dataset

- Type (households by mobile-only, fixed-mobile bundles, non-bundlers with fixed and mobile)

# 5G & Broadband Pricing and Strategy: Market Data

## Consumer Broadband Forecasts

Forecasts consumer demand for broadband access services by technology and speed

### DETAILS

**Frequency:** Biannual

#### Measures

- Consumer broadband subscriptions
  - By technology (xDSL, FTTP, cable, FWA, other)
  - By speed tier
  - By average download speed
- Household penetration
  - By technology
  - By speed tier
- Consumer broadband revenues

#### Regions

- Omdia's 67 tier 1 countries

## Fibre Development Index

Tracks and benchmarks fiber development across 81 countries. Metrics include fiber household coverage, household penetration, business penetration, mobile cell site fiber penetration, backbone investment, and average download/upload speeds.

### DETAILS

**Frequency:** Annual

#### Measures

- Global Index Ranking
- FTTH Penetration and Coverage
- Fibre backbone length
- Download and Upload Speed

#### Coverage

- 81 countries

# 5G & Broadband Pricing and Strategy: 2020-21 Research Themes

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## Innovating with 5G Pricing

Reports, trackers and case studies outline service provider pricing strategy for 5G

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The move to 4G saw little tariff innovation. The launch of 5G will require CSPs to undertake a more fundamental review of how they charge for data. Evolving tariffs for consumers around network speeds, greater data allowances, lower latency, and new super-charged video services will become more important with 5G. Ovum will assess how early adopters are meeting this challenge, and what the 5G pricing outlook will be for the next five years.

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## Monetizing Ultra-Fast Broadband

Case studies and go to market strategy reports for monetizing ultra=highspeed broadband services

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While 10Gbps services are available in a growing number of markets, many more operators are grappling with how to migrate customers from 100Mbps to 1Gbps. Ovum will identify the key lessons learned by operators who took the lead in offering 1Gbps services. What happened to premiums over time? What's the best way to market and monetize 1Gbps? Is it better to be an early adopter or a fast-follower? Ovum will answer all these questions and more in 2019.

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# Related Content: Digital Consumer Services Service Area Coverage



## Service Area Package: **Digital Consumer Services**

Broadband, Bundling & Pricing  
Intelligence Service

Smart Home  
Intelligence Service

Advanced Messaging &  
Communications Intelligence Service

Digital Consumer Platforms  
Intelligence Service

Digital Consumer Operator Strategy  
Intelligence Service

Consumer AI  
Intelligence Service

Digital Consumer Services Viewpoint Service

Broadband Pricing  
Spotlight Service

## About Omdia's Digital Consumer Services Research

Omdia provides expert analysis and data across Digital Consumer Services with unique coverage of service providers', over the top players', and major tech platforms' activity in this space. We can help identify which markets and offerings are driving growth in Digital Consumer Services, understand the strategies of key competitors and customers, and assess the impact of this rapidly evolving market across different businesses.

Our global team of analysts provides expertise on service provider and tech company strategy across Digital Consumer services including: broadband and bundling, messaging and communications, consumer platform strategies, digital operator services, app ecosystems, payments and commerce, smart home, and consumer AI.

### Custom Solutions

Omdia's consulting services offer a true end-to-end service capability across all aspects of your product lifecycle, from concept and product development, to go-to-market and sales effectiveness. **Contact us** if you have a project that you would like to discuss with a member of the team.

# Our “Ask an Analyst” Service Provides Best in Class Customer Support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia’s support team is here to help.

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Customer Success  
Manager



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### ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio\*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

\* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.