

Consumer Platforms & AI Intelligence Service

Part of the Digital Consumer Services and Media & Entertainment Service Area Package

Former Omdia Service Name: Digital Consumer Platforms Intelligence Service

Consumer platforms are driving innovation and disruption across consumer services, devices and business models. This service provides an end-to-end analysis of the major consumer platforms, benchmarking their strategies and services. Associated forecasts predict how their target markets are growing, market and service trackers along with surveys analysis provide critical insights into key trends and developments.

With recent service title change, this service also includes Omdia's coverage of Consumer AI, where consumer platforms are playing a key role in driving developments.

“The dominant consumer platforms have benefited from the pandemic, paving the way for even stronger growth in 2021 – and greater regulatory scrutiny.”

Seth Wallis-Jones,
Senior Analyst

“Consumer confidence AI is growing as is their interest in AI services, fuelling innovation and investments in 2021 and beyond.”

Eden Zoller,
Chief Analyst

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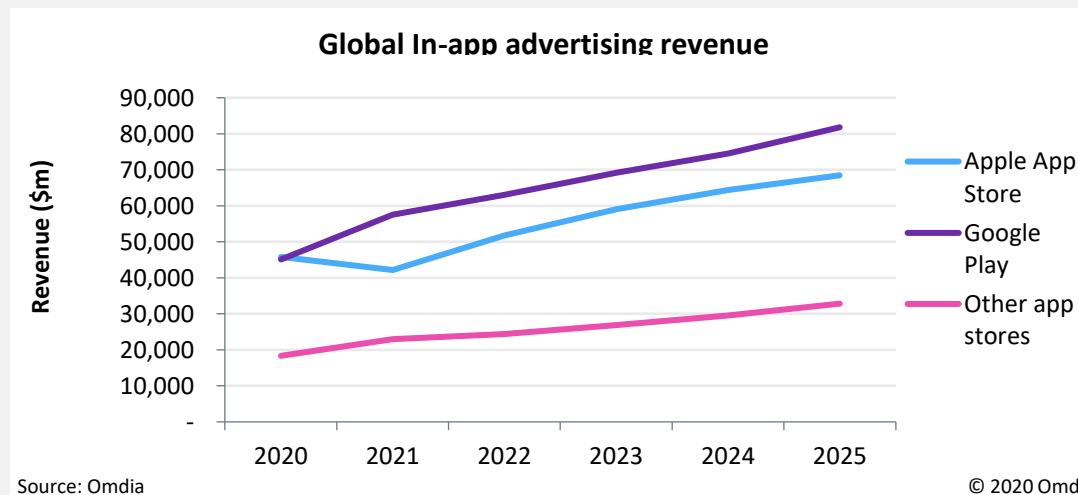
Although Apple has the lions share of paid application downloads, Google still dominates in app advertising revenues

HOW OMDIA HELPS YOU

- End-to-end coverage of the top consumer platforms and emerging players in this space
- New coverage of consumer AI adoption, capabilities and deployment across core digital consumer services and commerce
- Market forecasts for the service sectors in which the major consumer platforms operate
- Get to grips with app ecosystem dynamics – and the role that consumer platforms play
- Leverage surveys, data, forecasts and in-depth analysis to better understand consumer AI and consumer platforms

KEY QUESTIONS ADDRESSED

- Who are the consumer platform rising starts – the ones to watch?
- What are the major trends for consumer platforms and AI over the next year?
- How are consumer platform service revenues growing, what is their share of the overall services pie?
- What regulatory challenges do consumer platforms face?
- What do consumers think of consumer platform players, which ones do they trust most, whose services do they prefer?
- How is AI driving innovation and disruption in key consumer service domains?
- What are the growth projections for different types of consumer devices based on their AI capabilities (e.g. voice, vision)?
- What do consumers think about AI, what AI services do they use most?



Consumer Platforms & AI: Deliverables



MARKET FORECASTS

—Annual—

- App Ecosystem
- Mobile AR Apps
- Global carrier billing
- AI Devices
- AI Assistants
- Consumer Platform share of services



TRACKERS & BENCHMARKS

—Bi-annual or Annual—

- Consumer Platform Funding and M&A Tracker
- Consumer platform KPIs Tracker
- Social Media Tracker
- Consumer Platform Regulatory Tracker
- AI Innovation Tracker
- AI Assistant Benchmark
- Consumer Platform Player benchmark
- Consumer survey



REPORTS

—Annual—

- Trends to Watch
- Forecast reports
- Benchmark reports
- Tracker reports



THEMATIC REPORTS

—Ongoing—

- Series of reports based on core topic themes



ANALYST INSIGHTS

—Ongoing—

- Analyst commentary on market shifts, technology and regional developments, vendors, events, and more.



ANALYST ACCESS

—Ongoing—

- For prompt responses to urgent and unique questions.

Consumer Platforms & AI: Forecasts

App Ecosystems Forecast

Worldwide, regional and country-level estimates of downloads and user-spend/advertising revenue generated by mobile apps, segmented by store and app type.

DETAILS

Frequency: Yearly

Measures

- Downloads
- Consumer-spend revenue
- In-app advertising revenue

Geography

- Worldwide
- 67 country breakouts
- Rest-of-region breakouts
- Four regions
- Eight subregions

COVERAGE

App ecosystems

- Apple App Store
- Google Play
- Other app stores

App types

- Gaming apps
- Non-gaming apps

Mobile AR App Revenue Forecast

Worldwide, regional and country-level estimates of user-spend/advertising revenue generated by AR-enabled mobile apps, segmented by store and app type.

DETAILS

Frequency: Yearly

Measures

- Downloads
- Consumer-spend revenue
- In-app advertising revenue

Geography

- Worldwide
- 67 country breakouts
- Rest-of-region breakouts
- Four regions
- Eight subregions

COVERAGE

App ecosystems

- Apple App Store
- Google Play
- Other app stores

App types

- Gaming apps
- Non-gaming apps

Consumer Platforms & AI: Forecasts, contd.

Global Carrier-Billing Forecast

Worldwide, regional and country-level estimates of digital consumer services revenue derived from carrier billing and bundling, by market segment.

DETAILS

Frequency: Yearly

Measures

- Revenue
- Operator share of revenue
- Non-operator share of revenue

Geographies

- Worldwide
- 67 country breakouts
- Rest-of-region breakouts
- Four regions
- Eight subregions

COVERAGE

Vertical Market Segments

- OS app stores
- Indie stores
- PC/console/cloud games
- Browser-based/off-store
- Messaging-based (PRS)
- Mobile bundling
- Fixed/TV bundling
- Physical goods/services
- Microinsurance/e-health

Horizontal Segments

- By merchant
 - Apple
 - Google
- By media type
 - Video games
 - Digital Music
 - OTT video
- By bundling type
 - Mobile music
 - Mobile video
 - Fixed video
- By billing type
 - DCB
 - PSMS
 - Carrier wallets

Consumer Platforms Share of Service Revenue Forecast

Projecting the major consumer platform player's individual share of key consumer service segments and how this will grow over time.



DETAILS

Frequency: Annual

Measures

- Full segmentation to be confirmed in 2021

Geographies

Full segmentation to be confirmed in 2021

COVERAGE

Platform Companies

Full segmentation to be confirmed in 2021

Consumer Platforms & AI: Forecasts, contd.

AI Assistant Forecast

This forecast projects AI assistant active users and the device installed base with splits by device type and by the top AI assistant vendors.

DETAILS

Frequency: Annual

Measures

- Active users
- Installed base

Regions

- Worldwide
- North America (US, Canada)
- Western Europe (UK, France, Germany, Italy, Spain)
- Eastern Europe (Russia)
- The Middle East (Turkey, Saudi Arabia)
- Africa (South Africa, Nigeria)
- Oceania, Eastern and South-Eastern Asia (Australia, China, Japan, South Korea, Indonesia)
- Central and Southern Asia (India)
- Caribbean and Latin America (Brazil, Mexico)

COVERAGE

AI assistants by device

- Smartphones
- Tablets
- Wearables
- VR devices,
- Smart home devices
- Smart TVs
- Set-top boxes
- Media streamers

AI assistant vendors

- Amazon Alexa
- Apple Siri
- Google Assistant
- Microsoft Cortana
- Samsung Bixby

Consumer AI Devices Forecast

This forecast projects the AI capabilities of various consumer devices, focusing on voice, vision, movement and environmental capabilities graded according to the level of functionality.

DETAILS

Frequency: Annual

Measures

- Unit sales
- Installed base

Regions

- Worldwide
- North America (US, Canada)
- Western Europe (UK, France, Germany, Italy, Spain)
- Eastern Europe (Russia)
- The Middle East (Turkey, Saudi Arabia)
- Africa (South Africa, Nigeria)
- Oceania, Eastern and South-Eastern Asia (Australia, China, Japan, South Korea, Indonesia)
- Central and Southern Asia (India)
- Caribbean and Latin America (Brazil, Mexico)

COVERAGE

Consumer AI devices

- Smartphones
- Tablets
- Wearables
- VR devices,
- Smart home devices
- Smart TVs
- Set-top boxes
- Media streamers

AI device capability domains

- Voice
- Vision
- Movement
- Environmental

AI device capability levels (by domain)

- Level 1 (lowest capability grade) through to Level 3 (highest capability grade)

Consumer Platforms & AI: Trackers & Benchmarks

Consumer Platform Funding and M&A Tracker

Tracking both funding and M&A announcements by the leading platform companies, with details on value and target categorization.

DETAILS

Frequency: Bi-annual

Measures

- Target name and HQ location
- Funding round
- Disclosed round funding (\$ million)
- Investors/acquirer
- Target name and description
- Target category

Geographies

Worldwide

Consumer Platforms & Regulatory Tracker

Tracks relevant OTT regulatory initiatives, including regulations issued, fines, public consultation, investigations, and court decisions that impact OTT players

DETAILS

Frequency: Bi-annual

Scope

Tracks how regulators are attempting to level the playing field between traditional telcos and OTT providers. This tracker provides comprehensive information about the regulatory initiatives aiming for a more level playing field between technology providers and traditional providers and the new debates arising from the digital economy. This includes privacy, data protection, taxation, relevant competition cases, and more.

Consumer Platforms & AI: Trackers & Benchmarks, contd.

Consumer Platforms Key Performance Indicators

Financial performance data for key consumer platform companies.

DETAILS

Frequency: Bi-annual

Companies covered

Measures

- Revenue
- Operating profit
- Net Income
- R&D spend

Alibaba
 Amazon
 Apple
 Baidu
 Facebook
 Google
 Kaako
 LINE
 Naver
 PayPal
 Rakuten
 Tencent
 Yandex
 Twitter
 Snap

Geographies

- Worldwide

Consumer AI Innovation Tracker

This tracker is an interactive database tool that captures and classifies selected developments relating to consumer AI between 1Q 2018 onwards, with a focus on AI innovation.

DETAILS

Frequency: Bi-annual

Scope

- Developments are captured by year and quarter from 2018
- Developments by region and country (as appropriate)
- Developments can be filtered by the type of initiative (e.g. service/product launch, R&D, trials, investments, regulatory, privacy, partnerships)
- By the type of player (e.g. consumer tech player, telco, solutions vendor, device manufacturer, commerce platform, Media/digital content company, ad tech)
- By the type of service (e.g. smart home, TV& video, education, health, commerce, communications, games, music, productivity apps)
- By the type of AI technology (e.g. voice AI, visual AI, biometrics, Machine Learning, Deep Learning, AI analytics, VR, AR)

Consumer Platforms & AI: Trackers & Benchmarks, contd.

Social Media Tracker

Summarizes recent announcements by social media companies and provides detailed KPIs and two-year projections for key players.

DETAILS

Frequency: Bi-annual (**double check**)

Scope

The Social Media Tracker captures and classifies all announcements related to social media companies since January 2013. Records can be sorted by announcement date, announcement type, region, country, company name, and service type.

In addition, the tracker includes the detailed KPIs and projections for eight key social media players (e.g. Facebook, Twitter, TikTok) covering metrics including users, traffic, and revenue. The profile of each service includes several charts to aid the comparison of growth in users and other KPIs where relevant.

AI Assistant Benchmark

A dynamic capability assessment of the most relevant tech vendors in the AI assistant market at a global level. The benchmark rates the AI assistant performance and capabilities as well as the vendor's market strategy.

DETAILS

Frequency: Annual

Scope

- The benchmark assess and ranks AI assistants based on a points system.
- Assessment across strategic criteria: applications, native language support and availability, user experience, device categories, developer support, core AI capabilities, and monetization.
- Vendors covered: Amazon, Google, Apple, Microsoft, Samsung, Baidu, Alibaba.

Trackers & Benchmarks, Contd.

Consumer Platform Benchmark

Comprehensive benchmark designed to assess and rank the capabilities, performance and quality of leading Consumer Platforms.

DETAILS

Frequency: Annual

Scope

Mix of qualitative and quantitative analysis that will rank and score key players across a wide range of attributes covering their strategy, quality/capabilities in key service categories, supporting technology and ecosystem.

Companies covered

Google, Apple, Facebook, Amazon, Tencent, Alibaba.



Digital Consumer surveys

Omdia's ongoing, annual digital consumer insights survey programming that in 2020 included a standalone, extended Consumer AI survey.

DETAILS

Frequency: Annual

Scope

In 2020 the main survey program covered over 12,000 consumers in 12 markets. Specific insights relating to Consumer Platforms in multiple domains. Includes Consumer platforms in the context of TV & video services, smart home, AI assistants.

Specific insights relating to consumer commerce and data privacy. Includes insights into consumers preferred, named payment services, consumer usage of different types of commerce application; deterrents to payments. Plus consumer attitudes towards data privacy.

Specific insights relating to Consumer AI. Including knowledge and awareness of AI, concerns and fears; most used AI applications today and most desired features and functionality going forward.

Digital Consumer Platforms: Data, Reports and Analysis

Thematic reports

A series of reports based on our core Consumer Platform & AI topics that are designed to respond to the latest market trends, key developments and issues.

Frequency: Ad hoc
Scope

Thematic Research reports will respond to developments aligned with key consumer platform topic themes. Indicative example include:

- Emerging Asian super apps (e.g. ByteDance)
- Consumer Platform services and 5G media bundling
- Consumer Platform player case study assessments
- Consumer Platforms and regulatory developments
- The role of consumer AI during COVID-19
- AI impacts on consumer commerce
- AI impacts on games
- AI impacts on TV & video

Annual Reports

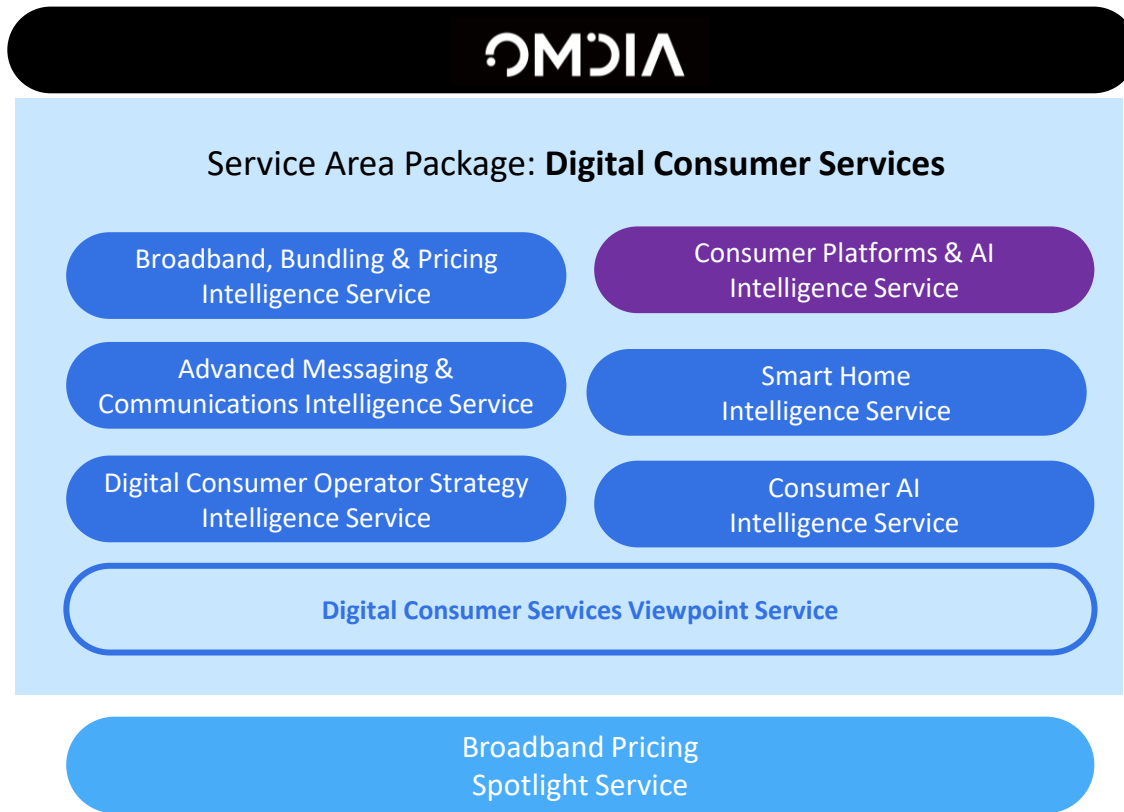
A series of reports on set themes, topics and/or players.

Frequency: Annual

Scope

- Consumer platforms and (separately) Consumer AI Trends to Watch reports. Omdia's predictions for the key developments in consumer platform domain for the year ahead
- Consumer survey reports. In-depth analysis of Digital Consumer Insight survey results as it relates to core coverage areas.
- Tracker reports – that accompany each of the major Tracker.
- Benchmark reports – that accompany each of the major benchmarks.
- Forecast reports. Reports giving the story behind our forecast numbers, giving predictions, recommendations, and drivers and inhibitors for each market segment.

Related Content: Digital Consumer Services Service Area Coverage



About Omdia’s Digital Consumer Services Research

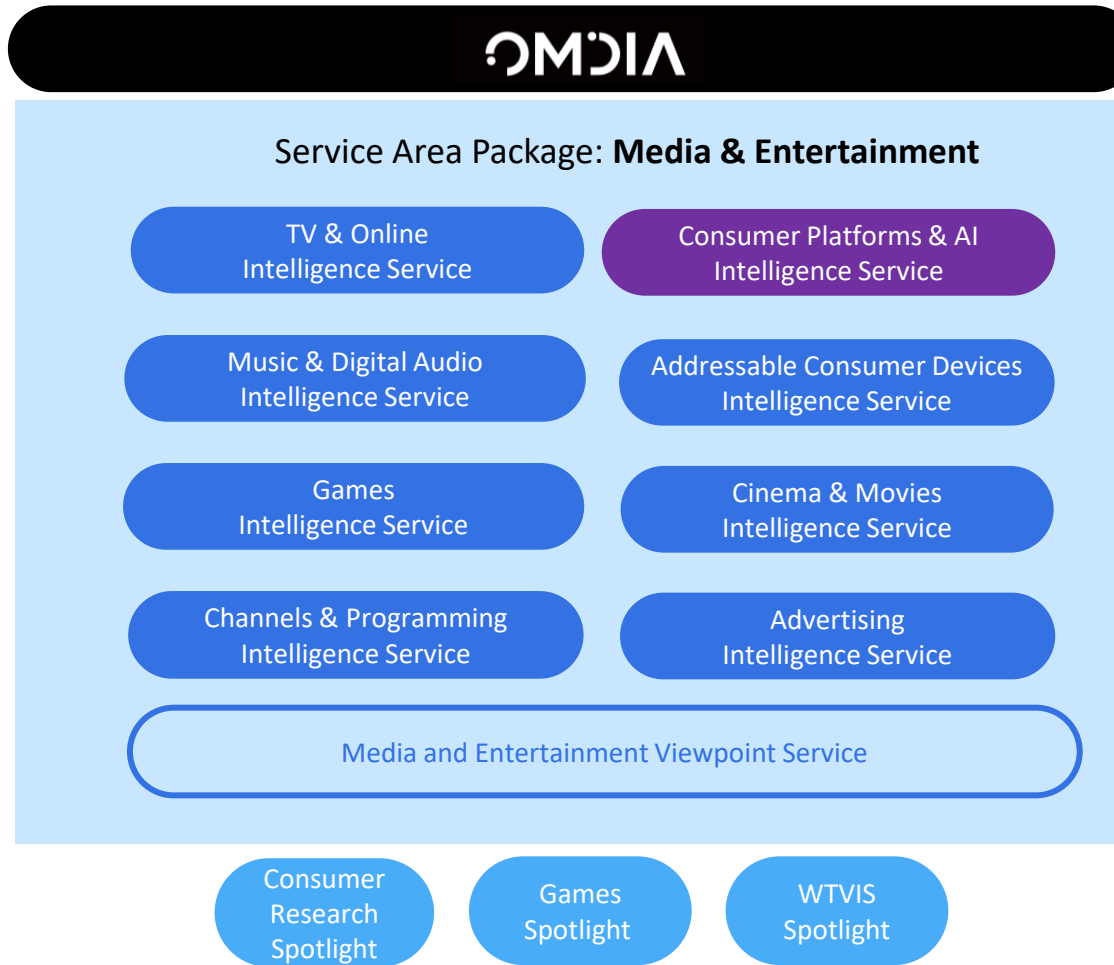
Omdia provides expert analysis and data across Digital Consumer Services with unique coverage of service providers’, over the top players’, and major tech platforms’ activity in this space. We can help identify which markets and offerings are driving growth in Digital Consumer Services, understand the 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.

Related Content: Media & Entertainment Service Area Coverage



About Omdia’s Media & Entertainment Research

Omdia’s Media & Entertainment portfolio provides forecasts, consumer survey data, competitive analysis and qualitative insights about the world’s largest, fastest-growing and dynamic markets. The team’s coverage provides a joined-up view of unrivalled depth and breadth across the sector’s most important geographies, technologies and companies.

Clients get access to a team of over 35 analysts each with specialized expertise and organized to address critical intersections in the rapidly converging media and entertainment market. The team is supported by an array of Omdia colleagues specializing in adjacent domains, such as mobile, broadband, devices, cloud and devices.

Consumer Platforms & AI: Migration to a Combined Product

Relevant to Subscribers of Legacy Products

- ✓ Consumer, Media & Entertainment (Ovum)
- ✓ Consumer Platforms and Ecosystems (IHS Markit Technology)

The new Consumer Platforms & AI Intelligence Service will combine research from legacy Ovum Consumer, Media & Entertainment and IHSM Consumer Platforms & Ecosystems.

This service was briefly sold by Omdia as the 'Digital Consumer Platforms IS' and has undergone a 2021 name change to 'Consumer Platforms & AI IS', with only difference between the two being the addition of AI coverage. See below for differences in this new service from the legacy Ovum and IHS Markit services.

BENEFITS AND FEATURES OF NEW SERVICE

- **Legacy Ovum Consumer, Media & Entertainment Subscribers:**
 - Consumer platform funding and M&A data and reports, Social Media Tracker, consumer platform KPIs Tracker and reports.
 - Access to new consumer AI coverage including AI device forecasts, consumer AI survey, AI assistant benchmark, AI innovation Tracker, AI impacts on consumer services report series.
- **Legacy IHSM Consumer Platforms & Ecosystems Subscribers:**
 - Mobile AR forecasts and reports, Carrier Billing forecasts and reports, enhanced access to consumer survey analysis.
 - Access to new consumer AI coverage including AI device forecasts, consumer AI survey, AI assistant benchmark, AI innovation Tracker, AI impacts on consumer services report series.

OTHER CHANGES

- Core mobile operator data formerly available in IHS Markit product now only available in dedicated services
- Dedicated mobile advertising forecasts now only available in Advertising Intelligence
- Possible change to companies covered in legacy IHSM Social & Messaging data

Digital Consumer Platforms: Our Expert Analysts



Eden Zoller
Chief Analyst,
Consumer AI



Guillermo Escofet
Principal Analyst



Seth Wallis-Jones
Senior Analyst

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.

Draw on our expertise

- Make the right decisions
- Sanity-check your own findings
- Get the most out of your subscription
- Understand more about our methodologies

Our Ask an Analyst service gives you direct contact via telephone, email or face-to-face session with our expert analyst team:



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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.