

# Digital Consumer Operator Strategy Intelligence Service

## Part of the Digital Consumer Services Service Area Package

A service focused on helping our service provider clients and their partners develop successful future strategies for digital retail services beyond communications - through detailed data tools and market trackers, unique forecasts, best practice case studies, and in-depth strategic reports.

“ Consumer smart home and IoT, OTT video, online gaming and digital commerce represent growth opportunities for telcos. The key questions are: What value can telcos bring in these areas? What strategy should they adopt to bring success? ”

**Michael Philpott**  
Research Director

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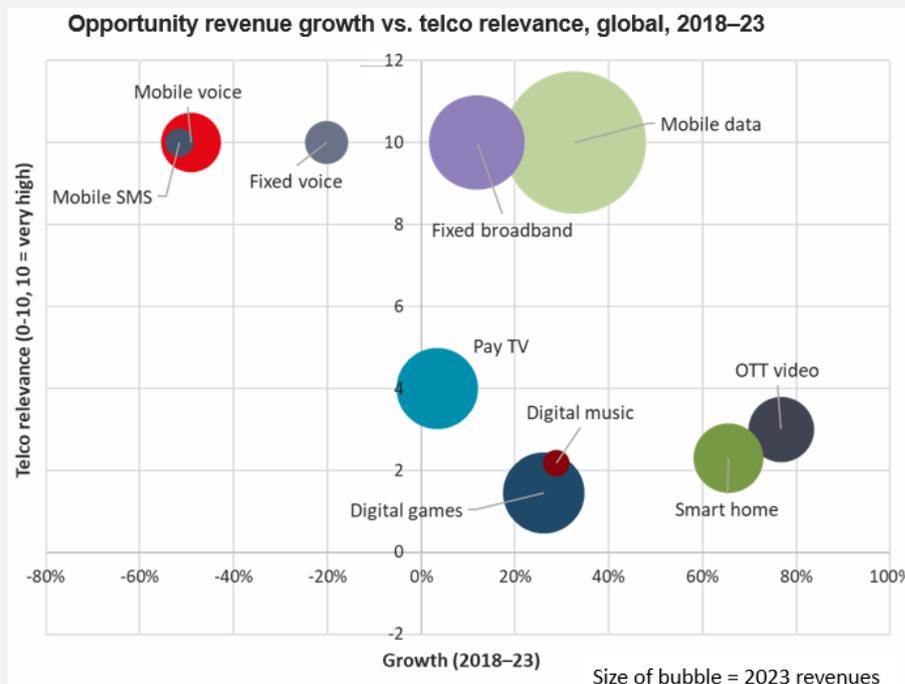
## HOW OMDIA HELPS YOU

- Digital consumer services TAM 5-year forecast and tool – quantify the largest telco media, smart home and consumer IoT, and commerce opportunities.
- Telco media and digital consumer market, partnership and investment trackers –monitor the strategies of leading players.
- Case studies, competitive analysis and benchmarks to highlight best practice

## KEY QUESTIONS ADDRESSED

- Beyond broadband and mobile data, where are the new revenue opportunities for consumer telecoms service providers?
- What is the best strategy for broadband service providers in the connected home, given the strength of Amazon and Google?
- What is the future of telco TV and video services?
- What strategy should service providers adopt around online and cloud gaming, to drive revenue growth and retention?
- What is the opportunity for service providers in consumer IoT, mobile media, commerce?
- What key players, partnerships and investments should CSPs consider?
- How should service providers leverage new technologies such as smart WiFi and 5G for digital consumer services?
- What will the impact of COVID-19 be on digital consumer services demand?

### Opportunity revenue growth vs. telco relevance, global, 2018–23



# Digital Consumer Operator Strategy: Our Expert Analysts

## Lead Analysts



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Service Provider Consumer



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# Digital Consumer Operator Strategy: Deliverables



## MARKET DATA

—Biannual / Annual—

- Digital Consumer Services TAM Forecast
- Operator services and partnership trackers



## SURVEYS

—Annual—

Digital consumer media and services insights – consumer survey on demand, usage, spend



## REPORTS

—Ongoing—

Role of telco in digital consumer  
Best practice case studies, competitive analysis



## ANALYST INSIGHTS

—Ongoing—

Analyst commentary on service provider digital consumer strategy, major market developments



## Presentations

—On going—

Presentations and webinars on key topics, major survey and forecast updates



## ANALYST ACCESS

—Ongoing—

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

# Digital Consumer Operator Strategy: Market Data

## Digital Consumer TAM Model

Provides a complete view of the digital consumer services market identifying the biggest future opportunities for service providers. 5-year forecasts.

### DETAILS

**Frequency:** Annual

**Measures**

- Mobile data revenue
- Fixed broadband revenue
- Communication services revenue
- Digital media revenue (TV/video, gaming, music)
- Smart home revenue
- New consumer digital services and commerce
- Total vs telco revenue opportunity
- Segmentation of telco revenue

**Regions**

- Omdia 67 countries and global

### COVERAGE

**Consumer revenues**

- Total market revenue (services)
- Telco service provider revenue segmentation
  - own brand services (direct revenue)
  - OTT/other partnership revenue (indirect)

Extension planned to cover new consumer digital services areas – exact segmentation TBD. New forecasts will reflect COVID-19 impact

## Telco TV Benchmark and Forecasts

Mobile and fixed bundling plan type and inclusions for Omdia’s Top 20 Tier 1 countries. 5-year forecasts for subscriptions, ARPU, revenue.

### DETAILS

**Frequency:** Annual

**Measures**

- Subscriptions
- ARPU
- Revenue
- Pay-TV market share

**Regions**

- Omdia 67 countries, seven regions and global

### COVERAGE

- Country-level telco TV forecasts include OTT video and pay-TV connections

# Digital Consumer Operator Strategy: Market Data

## Service Provider Smart Wi-Fi Tracker and Benchmark

This service provider offerings tracker captures and benchmarks the top-end routers being offered by leading broadband service providers in the top-20 countries that Ovum has identified as "smart Wi-Fi target countries."

### DETAILS

**Frequency:** Semi-annual

#### Measures

- Wi-Fi features
- Wi-Fi service positioning

#### Regions

- Top 20 broadband countries

### COVERAGE

#### Dataset

- Wi-Fi technical features
- Wi-Fi business model

## Operator–OTT Partnerships Tracker

This partnerships tracker provides analysis of the partnership deals signed between OTT media companies and mobile and fixed service providers.

### DETAILS

**Frequency:** Semi-annual

#### Measures

- Overall deals by type and date
- OTT deals by bundling strategy
- Service provider package details and the cost of each option provided

#### Regions

- Omdia 67 tier 1 countries

### COVERAGE

#### Dataset

- OTT partnership analysis

# Digital Consumer Operator Strategy: 2020-2021 Research Themes

## Service Provider Digital Home Strategies

Reports, trackers, case studies and forecasts outline the **digital home opportunity for service providers**

Numerous players from different backgrounds are competing side-by-side for a share of the digital home market. Competition is fierce, and many contenders are still struggling to find the optimum strategy and position in the home to maximize the opportunity.

Smart Wi-Fi has already become an essential component of the modern home, and the consumer appetite for smart home devices and applications is also growing quickly.

Omdia's research examines key market participants in the digital home space, helping clients to understand new business models and how to successfully market new technologies and services such as IoT security, parental controls and smart home WiFi.

Key digital home-related content in this service will include:

- Market outlook for smart home services
- Smart home service provider partnership and investment trackers
- Smart WiFi benchmarks and forecasts
- Case studies for best-practice smart home and smart WiFi service provider strategies
- Smart home broadband service provider tracker
- Consumer survey data on smart home services demand, spend, provider preference

## Telco TV and Video Strategies

Reports, trackers, case studies and forecasts outline the **TV and video opportunity for service providers**

Broadband providers, telecom companies, and cable companies will occupy an increasingly crucial role in digital consumers' lives, especially after 5G arrives.

This service will analyze leading service provider TV and video strategies, provide best practice case studies, deliver relevant and regularly-updated deal and partnership trackers, and provide dedicated market forecasts.

Deliverables will be geared to the question of where and how service providers can best play in the consumer TV and video value chain.

Key telco TV and video-related content in this service will include:

- Market outlook for telco TV services
- Telco TV service provider partnership and investment trackers
- Telco TV and video forecasts
- Case studies for best-practice telco TV strategies
- Consumer survey data on consumer telco TV and video usage, spend, future intention

# Digital Consumer Operator Strategy: 2020-2021 Research Themes

## Service Provider Digital Media (Gaming and Music) Strategies

Reports, trackers, case studies and forecasts outlining the service provider opportunities in digital media, including gaming and music

As the online and mobile gaming and music markets evolve, and as 5G becomes a reality, new opportunities will arise for service providers to develop, partner and deliver enhanced customer value and experience for digital media consumers.

This service offers insight on service provider partnership paths, business models and revenue opportunities in the digital media space, drawing on expertise from Omdia's digital gaming and music analysts and datasets.

Key content in this service will include:

- Market outlook for service provider digital media
- Reports and forecasts on service provider digital gaming and music opportunities
- Case studies for best-practice service provider digital media business models and partnerships
- Consumer survey data on interest in telco-provided/enabled digital media services

## Service Provider Consumer IoT Strategies

Reports, trackers, case studies and forecasts outlining the service provider opportunities in consumer IoT and related services

Consumer connected devices stretch well beyond the smartphone and broadband router. From connected wearables and trackers to consumer-facing services in the connected car and in healthcare, consumers are rapidly adopting new digital services to enhance their lives.

Service providers have a key role to play in developing and delivering these, and need to work with partners across the ecosystem to ensure delivery is consistent, secure and engaging for their customers.

Key content in this service will include:

- Market outlook for service provider-addressable consumer IoT services
- Consumer IoT partnership and investment tracking
- eSIM for consumer IoT devices
- Case studies for innovation in consumer IoT business models
- Consumer survey data on consumer IoT take-up, spend, provider preferences

# Digital Consumer Operator Strategy: 2020-2021 Research Themes

## Service Provider Commerce and Payments Strategies

Reports, trackers, case studies and forecasts outlining the service provider opportunities in digital commerce and payments

Digital commerce accounts for a growing proportion of consumer spending, and service providers have an important role as enablers. Mobile money offerings, e-commerce wallets, carrier billing and conversational commerce partnerships are all elements of service provider strategy.

Key content in this service will include:

- Market outlook for service provider commerce and payments
- Service provider commerce and payments forecasts
- Report on carrier billing opportunities and strategies

# 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.

## 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:



**Tom Coate**  
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Manager



**Kâren Dyer**  
Customer Success  
Manager



## CONNECT WITH US

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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.