

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

Digital Consumer Operator Strategy Intelligence Service

Part of the Digital Consumer Services Service Area Package

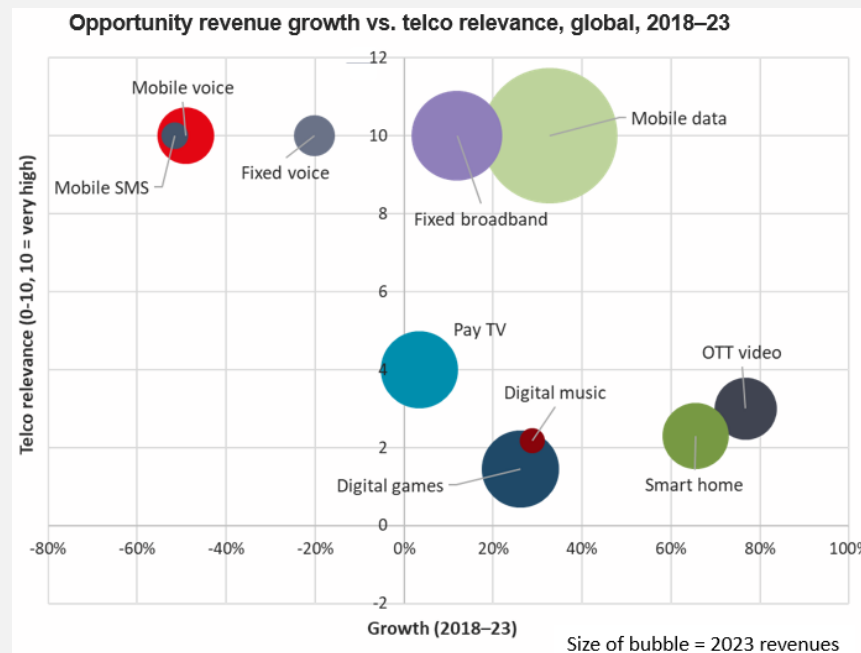
HOW OMDIA HELPS YOU

- 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



Michael Philpott
Research Director
Service Provider Consumer



Jonathan Doran
Principal Analyst
Digital Consumer Operator Strategies



Pal Karlsen
Research Analyst
Emerging Consumer Services

Contributors



Eden Zoller
Chief Analyst,
Consumer AI



Mariana Zamoszczyk
Senior Analyst
Smart Home Services



Guillermo Escofet
Principal Analyst,
Digital Consumer
Tech Platforms



George Jijashvili
Senior Analyst
Video Games

Digital Consumer Operator Strategy: Deliverables



MARKET DATA

—Biannual / Annual—

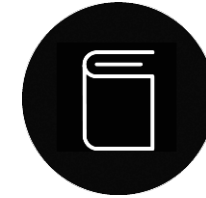
Digital Consumer Services TAM Forecast
Operator services and partnership trackers



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 Opportunities in Games and eSports

Reports, trackers, case studies and forecasts outlining the service provider opportunities in gaming and eSports

DETAILS

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 gaming and eSports and datasets.

Key content in this service will include:

- Market outlook for service providers
- Reports and forecasts on service provider opportunities
- Case studies for service provider best practices across business models and partnerships
- Consumer survey data on interest in telco-provided/enabled services

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
Customer Success
Manager



Kâren Dyer
Customer Success
Manager



CONNECT WITH US

 @OmdiaHQ | [omnia.com](https://www.omnia.com)

Customer Success

E: customersuccess@omnia.com

SALES

US: +1 (212) 652 5335

APAC: +61 (0)396 016 700

EMEA: +44 (0)7771 980 316

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.