Consumer Platforms & AI Intelligence Service

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

As global tech’s ‘metaverse’ platforms are developed, Consumer Platform & AI evaluates the latest strategies and services that matter from the likes of Google, Amazon, Apple, Meta, Tencent and more. Acquire leading insight into these platforms’ business models, innovation, and monetization, as well as understanding the regulation affecting their future.

Consumer Platform & AI also tracks leading developments and disruption in AI (e.g., generative AI, AI ethics and governance) and identifies the where, what and how AI is impacting consumer services. Omdia shares the key trends and critical data that enable you to differentiate, explore partnerships, and stay competitive. Access forecasts, market and service trackers, and consumer surveys.
Consumer Platforms & AI Intelligence Service

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

HOW OMDIA HELPS YOU

- End-to-end coverage of the top consumer platforms and emerging players in this space
- Analysis of key developments in AI (e.g., generative AI) and how this impacts consumer services and players
- A balanced assessment of the metaverse, helping identify the real opportunities and challenges ahead
- Market forecasts for the service sectors in which the major consumer platforms operate, including the app ecosystem
- Leverage surveys, trackers, benchmarks, forecasts and reports to better understand consumer AI and consumer platforms

KEY QUESTIONS ADDRESSED

- Who are the consumer platform rising stars – the ones to watch?
- What are the major trends for consumer platforms, the metaverse and AI over the next year?
- How are consumer platform service revenues growing, what is driving growth, and what is their share of the overall services pie?
- What regulatory challenges do consumer platforms, and also AI developments face?
- What are the key trends for the metaverse, who are the major players and what are they doing?
- What are the major opportunities and challenges for the metaverse?
- How is AI driving innovation and disruption in key consumer service domains?
- What do consumers think about AI, what AI services do they use most?
- What are the biggest issues facing AI governance and trust, what should the industry do about it?
Digital Consumer Platforms: Our Expert Analysts

Eden Zoller
Chief Analyst
Digital Consumer Platforms & AI

Guillermo Escofet
Principal Analyst
Digital Consumer Platforms

Seth Wallis-Jones
Senior Analyst
Digital Consumer Platforms
Consumer Platforms & AI: Deliverables

MARKET FORECASTS
— Annual —
App Ecosystem
Mobile AR Apps
Global carrier billing
Consumer Platform share of services

TRACKERS & BENCHMARKS
— Bi-annual or Annual —
Consumer Platform Funding and M&A Tracker
Consumer platform KPIs Tracker
Consumer Platform Regulatory Tracker
Consumer AI & Metaverse Tracker
Consumer Platform Player benchmark
Consumer survey

REPORTS
— Annual —
Trends to Watch
Forecast reports
Benchmark reports
Tracker reports
Survey 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.

<table>
<thead>
<tr>
<th>DETAILS</th>
<th>COVERAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Frequency:</strong> Yearly</td>
<td><strong>App ecosystems</strong></td>
</tr>
<tr>
<td><strong>Measures</strong></td>
<td>• Apple App Store</td>
</tr>
<tr>
<td>Downloads</td>
<td>• Google Play</td>
</tr>
<tr>
<td>Consumer-spend revenue</td>
<td>• Other app stores</td>
</tr>
<tr>
<td>In-app advertising revenue</td>
<td><strong>App types</strong></td>
</tr>
<tr>
<td>Worldwide</td>
<td>• Gaming apps</td>
</tr>
<tr>
<td>67 country breakouts</td>
<td>• Non-gaming apps</td>
</tr>
<tr>
<td>Rest-of-region breakouts</td>
<td><strong>Geography</strong></td>
</tr>
<tr>
<td>Four regions</td>
<td>• Worldwide</td>
</tr>
<tr>
<td>Eight subregions</td>
<td>67 country breakouts</td>
</tr>
<tr>
<td></td>
<td>Rest-of-region breakouts</td>
</tr>
<tr>
<td></td>
<td>Four regions</td>
</tr>
<tr>
<td></td>
<td>Eight subregions</td>
</tr>
</tbody>
</table>

#### 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.

<table>
<thead>
<tr>
<th>DETAILS</th>
<th>COVERAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Frequency:</strong> Yearly</td>
<td><strong>App ecosystems</strong></td>
</tr>
<tr>
<td><strong>Measures</strong></td>
<td>• Apple App Store</td>
</tr>
<tr>
<td>Downloads</td>
<td>• Google Play</td>
</tr>
<tr>
<td>Consumer-spend revenue</td>
<td>• Other app stores</td>
</tr>
<tr>
<td>Antitrust impact scenarios: low, medium, high</td>
<td><strong>App types</strong></td>
</tr>
<tr>
<td>In-app advertising revenue</td>
<td>• Gaming apps</td>
</tr>
<tr>
<td><strong>Geography</strong></td>
<td>• Non-gaming apps</td>
</tr>
<tr>
<td>Worldwide</td>
<td>• Worldwide</td>
</tr>
<tr>
<td>67 country breakouts</td>
<td>67 country breakouts</td>
</tr>
<tr>
<td>Rest-of-region breakouts</td>
<td>Rest-of-region breakouts</td>
</tr>
<tr>
<td>Four regions</td>
<td>Four regions</td>
</tr>
<tr>
<td>Eight subregions</td>
<td>Eight subregions</td>
</tr>
</tbody>
</table>

### 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**

**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 Digital Media Forecast

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

**DETAILS**
- **Frequency:** Yearly

**Measures**
- **Consumer-spend revenue**
- **Advertising revenue**

**Market segments**
- **Verticals:**
  - Games
  - Music
  - Social media & communications
  - Video
- **Horizontals:**
  - Advertising
  - App stores

**Platform Companies**
- Alibaba
- Amazon
- Apple
- Google
- Meta
- Tencent

**Geographies**
- Segmented into eight subregions
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 activities description
- Target category
- Sub-categorizations identifying AR/VR, and AI components

**Geographies**
Worldwide

**Consumer Platforms & Regulatory Tracker**

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

**DETAILS**

**Frequency:** Annual

**Scope**
Track how regulators are attempting to level the playing field between traditional telcos and OTT providers. This 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 Key Performance Indicators**

Financial performance data for key consumer platform companies.

**DETAILS**

**Frequency:** Bi-annual

**Measures**
- Revenue
- Operating profit
- Net Income
- R&D spend
- Balance sheets
- Segmented revenue, operating profit
- User data (e.g. subscribers, MAU)
- Cross platform performance indexing by category

**Companies covered**
- Alibaba
- Alphabet
- Amazon
- Apple
- Baidu
- Kakao
- LINE
- Meta
- Naver
- PayPal
- Rakuten
- Tencent
- Yandex
- Twitter
- Snap

**Geographies**
- Worldwide

**Consumer AI & Metaverse Tracker**

This tracker is an interactive database tool that captures and classifies selected developments relating to consumer AI and the Metaverse.

**DETAILS**

**Frequency:** Bi-annual

**Scope**
- Consumer AI and metaverse developments can be tracked separately – or together
- 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 technology relevant to consumer AI and the metaverse (e.g. voice AI, visual AI, biometrics, Machine Learning, Deep Learning, avatars, NFT, cryptocurrencies, AI analytics, VR, AR)

**Companies covered**
- Alibaba
- Alphabet
- Amazon
- Apple
- Baidu
- Kakao
- LINE
- Meta
- Naver
- PayPal
- Rakuten
- Tencent
- Yandex
- Twitter
- Snap

**Geographies**
- Worldwide
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**

The benchmark assess and rates the performance and capabilities of 7 leading consumer platforms across 11 core consumer service and device categories.

- The service categories comprise: TV and video, games, music and audio, productivity and information services, communications and social, smart home services and devices, commerce, financial services.
- The devices category is focused primarily on the CP’s own-brand devices and is broken out into three segments: mobile devices, laptops/desktop, home entertainment devices.
- Each benchmark category is scored against a set of assessment criteria and corresponding attributes, using a mix of quantitative and qualitative inputs.

**Companies covered**

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

---

**Metaverse Games Benchmark**

This benchmark provides a capability assessment of selected games that aspire to offer a metaverse-like virtual world.

**DETAILS**

**Frequency:** Annual

**Scope**

The benchmark assesses and rates the performance and capabilities of 7 metaverse games across five core parameters:

- **Scale**, further split into audience size; availability and scalability; and interoperability
- **Monetization**, further split into in-world economy and commerce; advertising/other monetization; and financial performance
- **Entertainment**, further split into games; live events; and other entertainment
- **Interaction**, further split into social; utility; and identity
- **Technology**, further split into VR/AR/XR; other technology; and vision

**Games covered**

Roblox, Fortnite, Minecraft, Core, Horizon Worlds, Zepeto, Dreams
Trackers & Benchmarks, Contd.

Consumer Surveys

Omdia’s ongoing, annual digital consumer insights survey program that includes a standalone Consumer AI survey that from 2022 will be extended to explore consumer attitudes to the metaverse.

DETAILS

Frequency: Annual

Scope
Specific insights relating to Consumer AI, including:
• The degree to which consumers understand AI – and how they obtain this knowledge
• What and where consumer see benefits in AI – and what they are worried about
• Ownership and perceived value of consumer AI devices
• Deep dive on consumer usage of AI in a range of specific scenarios: voice assistants, the smart home, shopping, TV and video, games.
• Consumer views on AI governance.
**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 respond to developments aligned with key consumer platform topic themes. Indicative example include:

- Key players in the metaverse: movers and shakers
- The Metaverse and crypto: A primer
- Consumer Platform player case study assessments
- Consumer Platforms regulatory developments
- 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**

- Trends to Watch reports. Omdia’s predictions for the key developments in consumer platform domain, the metaverse and AI for the coming year.
- Consumer survey reports. In-depth analysis of Insight survey results as it relates to core coverage areas.
- Tracker reports – that accompany each of the major Trackers.
- 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.
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 receive 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, digital consumer services and media delivery.
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:

Shelley Hunter  
Customer Success Manager

Kären Dyer  
Customer Success Manager

96% of our customers rate our service as Excellent or Very Good
Thank you

Disclaimer

The Omdia research, data and information referenced herein (the “Omdia Materials”) are the copyrighted property of Informa Tech and its subsidiaries or affiliates (together “Informa Tech”) or its third party data providers and represent data, research, opinions, or viewpoints published by Informa Tech, and are not representations of fact.

The Omdia Materials reflect information and opinions from the original publication date and not from the date of this document. The information and opinions expressed in the Omdia Materials are subject to change without notice and Informa Tech does not have any duty or responsibility to update the Omdia Materials or this publication as a result.

Omdia Materials are delivered on an “as-is” and “as-available” basis. No representation or warranty, express or implied, is made as to the fairness, accuracy, completeness, or correctness of the information, opinions, and conclusions contained in Omdia Materials.

To the maximum extent permitted by law, Informa Tech and its affiliates, officers, directors, employees, agents, and third party data providers disclaim any liability (including, without limitation, any liability arising from fault or negligence) as to the accuracy or completeness or use of the Omdia Materials. Informa Tech will not, under any circumstance whatsoever, be liable for any trading, investment, commercial, or other decisions based on or made in reliance of the Omdia Materials.

Get in touch!

customersuccess@omdia.com  @Omdia  @OmdiaHQ