

Addressable Consumer Devices Intelligence Service

Part of the Media & Entertainment Service Area Package

In-depth country level data, forecasts and analysis of the different devices owned and used by consumers to help provide clients with a holistic view of device ecosystems and trends.

“ The device ecosystem moves quickly, with new features and completely new device types emerging regularly. This service takes a birds-eye view of the entire devices landscape to help our partners stay ahead of disruptive trends in the industry. ”

David Tett
Lead Analyst

Addressable Consumer Devices Intelligence Service

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Connected devices installed base by device segment, 2015-2024, Global

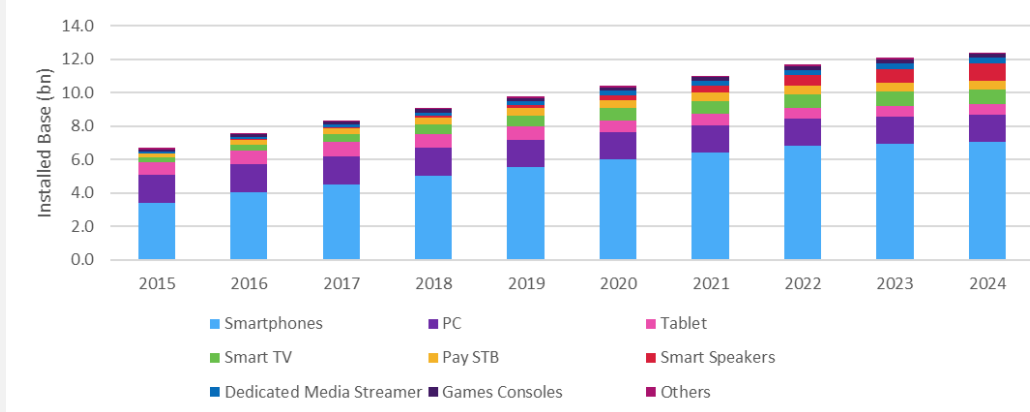
HOW OMDIA HELPS YOU

- Size the entire consumer device market, leveraging expertise from Omdia’s deep device research
- Examine the growth of different ecosystems and technologies across multiple device segments
- Understand the strengths and weaknesses of the important players across these various device segments
- Identify underserved consumers to assist with product launch and strategy decisions

KEY QUESTIONS ADDRESSED

- How many addressable devices are there for video OTT services in a country? How are these split by device type or by platform?
- What are the ownership trends for devices? How many actual users exist for the various devices and what is the profile of customers with many devices or few devices? What are the emerging technologies that will shape device ownerships and consumption trends? How quickly are these trends gaining popularity? Who is driving these trends?
- Who are the key players across the landscape of consumer devices? How do their strategies, platforms, technologies differ?

Connected Devices Installed Base, 2015-2024



Addressable Consumer Devices: Meet the Analysts



Maria Rua Aguite
Senior Research Director
TV, Video, Advertising



Max Signorelli
Senior Analyst
TV, Video & Advertising

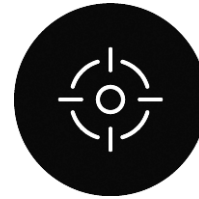


David Tett
Principal Analyst
Addressable Consumer
Devices



Daniel Sutton
Principal Analyst
TV, Video & Advertising

Addressable Consumer Devices: Deliverables



MARKET TRACKER

—Quarterly—

Connected Devices Tracker: installed base and supported platforms for smartphones, tablets, smart TVs, STBs, media streamers, game consoles, smart speakers, PCs and AI Assistants



ANALYST INSIGHTS

—Ongoing—

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



REPORTS

—Annual—

Reports on each forecast update with analysis of major trends



ANALYST ACCESS

—Ongoing—

For prompt responses to urgent and unique questions

Addressable Consumer Devices: Market Data

Connected Devices Tracker

Worldwide, regional and country level installed base forecasts for the key consumer devices, examining the devices based on the supported platforms and technologies

DETAILS

Frequency: Quarterly (annual data updated quarterly)

Measures:

- Installed base

Country level data:

- Worldwide
- North America - US, Canada
- Latin America – Mexico, Brazil, Argentina...
- Europe – UK, Germany, Spain...
- Middle East
- Africa – Nigeria, South Africa...
- Asia and the Pacific – China, Japan...

COVERAGE

Device segments:

- Smartphones, tablets, smart TVs, STBs, media streamers, game consoles, smart speakers, PCs, AI Assistants

Platform level splits:

- Platform split for each device segment e.g. Android and iOS for smartphone; Windows, Mac and Chromebook for PC; Fire OS, Roku OS, Android TV, tvOS for media streamers etc.

4K Devices:

- Total 4K devices by device segment for each country

eSIM Devices Forecast

This forecast projects eSIM unit sales and installed base with splits by device type.

DETAILS

Frequency: Annual

Measures

- Unit sales
- Installed base

Regions

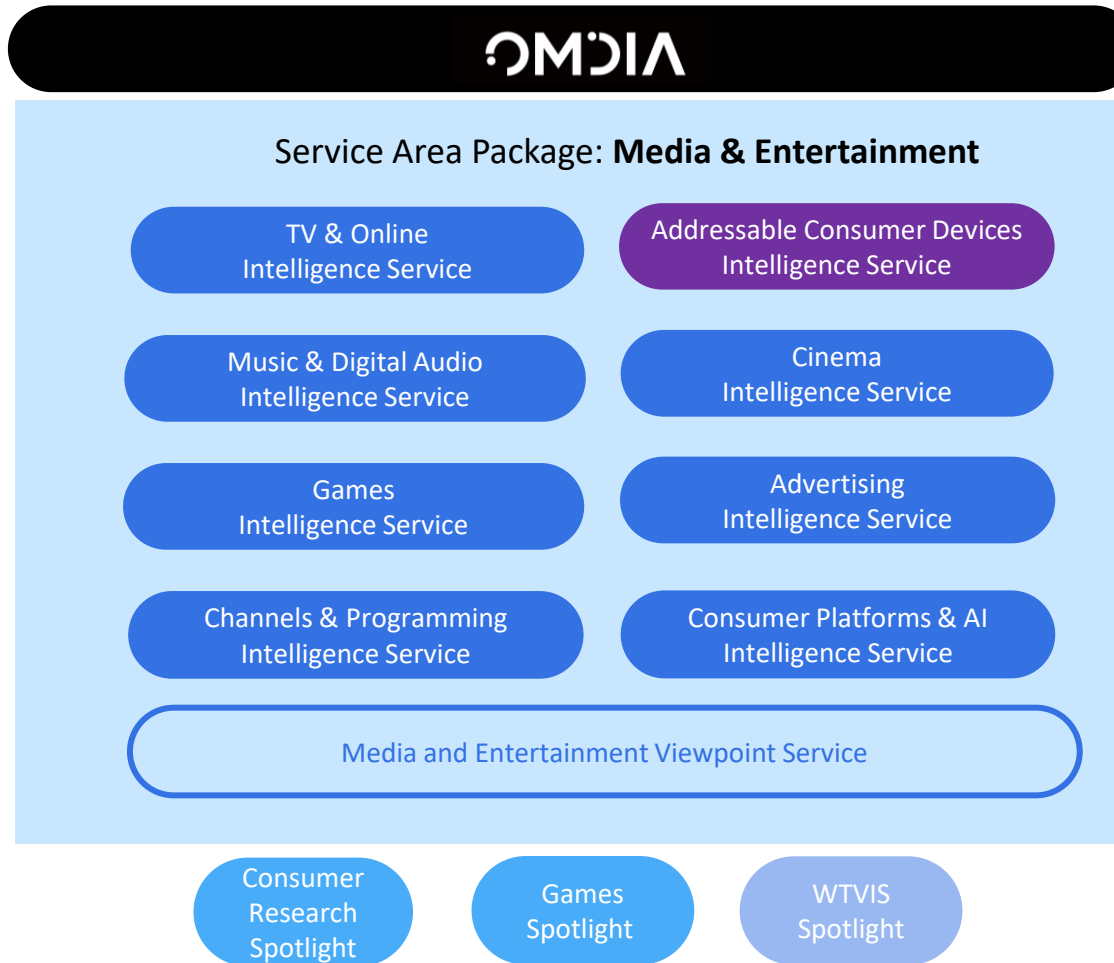
- Worldwide
- North America - US, Canada
- Latin America – Mexico, Brazil, Argentina...
- Europe – UK, Germany, Spain...
- Middle East
- Africa – Nigeria, South Africa...
- Asia and the Pacific – China, Japan...

COVERAGE

eSIM devices by device type

- Smartphones
 - Android
 - iOS
 - Other OS
- Tablets
 - Android
 - iPad OS
 - Windows
- Wearables
- Other devices

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 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.

Related Content: Consumer Electronics & Display Applications Service Area Coverage



Service Area Package: Consumer Electronics & Display Applications

Desktop Monitor Market Tracker	Digital Signage & Prof Display Intelligence Service
Home Appliance Intelligence Service	LED Video Displays Intelligence Service
Mobile PC Intelligence Service	Smartphone Intelligence Service
Smart Home Intelligence Service	TV Sets Intelligence Service
Medical Imaging Specialty Displays Tracker	
Consumer Electronics Viewpoint Service	

Digital Signage & Prof Display Spotlight Service	Smartphone Spotlight Service
TV Sets Spotlight Service	World Cellular Handset Spotlight Service

About Omdia's Consumer Electronics & Display Application Research

World-class coverage of the consumer electronics industry, this research is led by analysts who come from the industry and have extensive experience from supply chain to market verticals.

This research services allows accessibility to Omdia expertise covering TVs, smartphones, mobile PC, smart home, home appliance and professional AV products.

With in-depth coverage of shipments, prices, install base, market opportunities, regional trends, companies and new technologies, our research coverage covers all important analysis incorporating context and industry implications.

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

Consumer Platforms & AI
Intelligence Service

Digital Consumer Operator Strategy
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.

Addressable Consumer Devices: Migration to a Combined Product

Relevant to Subscribers of Legacy Products

- ✓ Consumer Tech (Ovum)
- ✓ Connected Devices Intelligence Service (IHS Markit Technology)

The new Addressable Consumer Devices IS will be a joining of the legacy IHSM Connected Devices Intelligence Service Intelligence Service and the legacy Ovum Consumer Tech service

BENEFITS AND FEATURES OF NEW SERVICE

- **All Subscribers:**
 - Greater focus on the macro trends across all device segments; analysis of the strategic positioning of key players across multiple device segments.
 - Additional forthcoming forecasts examining the addressable market for Media & Entertainment services.
 - Standardized country level coverage across devices enabling a complete view of the devices ecosystems in those markets.

OTHER CHANGES

- Ovum Consumer Tech customers looking for more detailed device coverage should look at intelligence services aimed specifically at those devices such as Smartphone IS, Television IS, Mobile PC IS.
- This service does contain less device level data than what was included in Ovum Consumer Tech. The device level data contained in this service will be of higher quality because it is informed by the extensive IHSM primary device research practices, with additional benefits detailed on next slide.

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BENEFITS AND FEATURES OF NEW SERVICE

- **Legacy Ovum Consumer Tech Subscribers:**
 - Side-by-side comparisons of device adoption trends
 - More in-depth coverage of the platforms that run across device segments
 - Details on platforms now included on more devices
 - More country coverage for non-smartphone devices
- **Legacy IHSM Connected Devices Intelligence Service Subscribers:**
 - More in-depth analysis and reports on the technologies and features of the various devices such as AI capability or eSIM
 - Big picture strategic views qualitative reports informing current and future market landscape
 - Wearables and smart watch coverage added

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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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.