The background is dark with abstract, wavy patterns of small purple dots. In the center, there is a large, white, stylized logo. The logo consists of a circular element on the left, followed by the letters 'M', 'C', 'I', and 'A' in a bold, sans-serif font. The 'C' and 'I' are slightly larger than the 'M' and 'A'.

CMCIA

Brought to you by Informa Tech

World Broadband Information Series (WBIS) Spotlight Service

A Spotlight Service complementing the Service Providers & Markets Service Area Package

The definitive source for constantly updated and accurate subscriber data and service revenues for the fixed broadband industry worldwide. This service tracks key operator KPIs and provides 5-year forecasts for fixed broadband and fixed voice.

PRODUCT OVERVIEW | World Broadband Information Series (WBIS) Spotlight Service

“The number of fixed broadband subscriptions globally will reach 1.8 billion by end-2028.

Ronan de Renesse
Senior Research Director, Service Provider Markets

OMDIA

World Broadband Information Series (WBIS) Spotlight Service

A Service Complementing the Service Providers and Markets Service Area Package

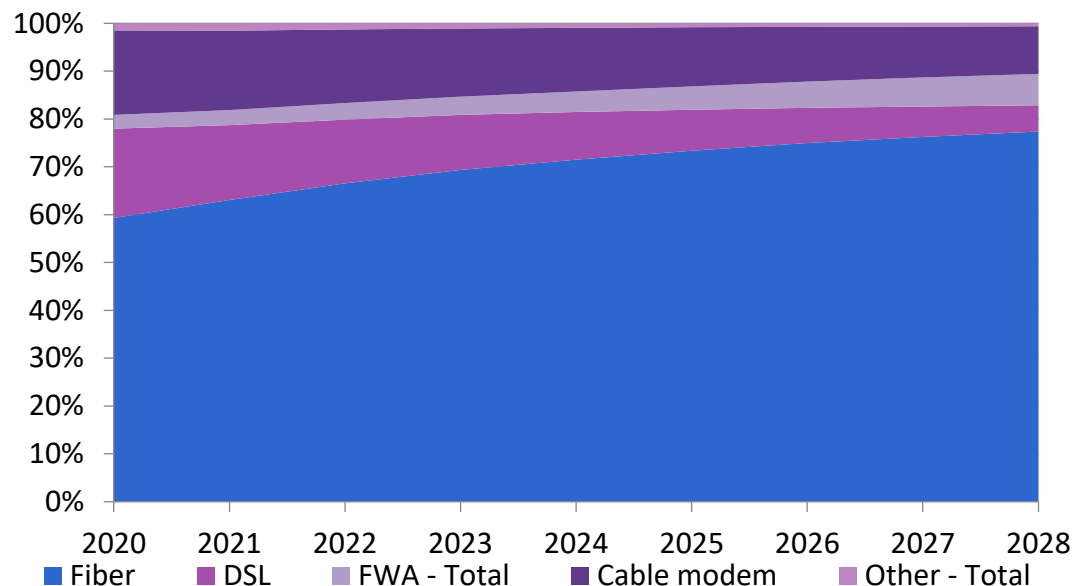
HOW OMDIA HELPS YOU

- Understand the size and rate of growth for fixed voice and broadband markets
- Identify the market trends and dynamics for broadband globally
- Track the performance of service providers across their regional and country markets
- Understand the subscription and revenue growth trajectories for fixed services and broadband technologies by country market

KEY QUESTIONS ADDRESSED

- Which service providers and networks are experiencing the highest level of growth and churn?
- What are the comparative growth prospects for fixed service providers in specific country markets?
- What are the historical and forecast trends for service provider KPIs?
- How will fixed 5G change the composition of fixed wireless access over time?
- What are the prospects for consumer vs enterprise connections, revenues & ARPU by country?

Technology market share forecast



Fiber drives growth:
passing 1 billion
subscriptions in 2023

Source: Omdia

© 2024 Omdia

OMDIA

Deliverables: The most current and complete source of data available on service provider fixed markets



MARKET DATA

MARKET SEGMENTS	Fixed, Fixed Broadband, Fixed Voice
TIME SERIES	Quarterly historical, Annual historical, 5-year annual forecast
METRICS	Subscriptions, Revenues, Capex, ARPU, EBITDA, Household data... see full metrics list on pages 11-12
SERVICE PROVIDERS	~ 700
GEOGRAPHIES	Africa, Central & Southern Asia, Eastern Europe, Latin America & the Caribbean, Middle East, North America, Oceania Eastern & South-Eastern Asia, Western Europe. Up to 210 countries/ territories.
UPDATE FREQUENCY	Daily updates. Quarterly historical – added each subsequent quarter; Annual forecasts – quarterly refresh, annual update



ANALYST ACCESS

Prompt responses from Omdia’s analyst team to urgent and unique questions.

WBIS Data Views

Data Dashboard	Filter the dataset and export
Visualizations	Interactive charts and maps
Benchmarks	Company KPI league tables

WBIS Data Views: Data dashboard

Identify opportunities and trends across fixed markets

Simple to use tabular dashboards allow you to present market share, growth rates, forecasts and historical KPIs. Select, filter and extract the data you require for easy analysis in MS Excel.

Simple search to select and group the data you require

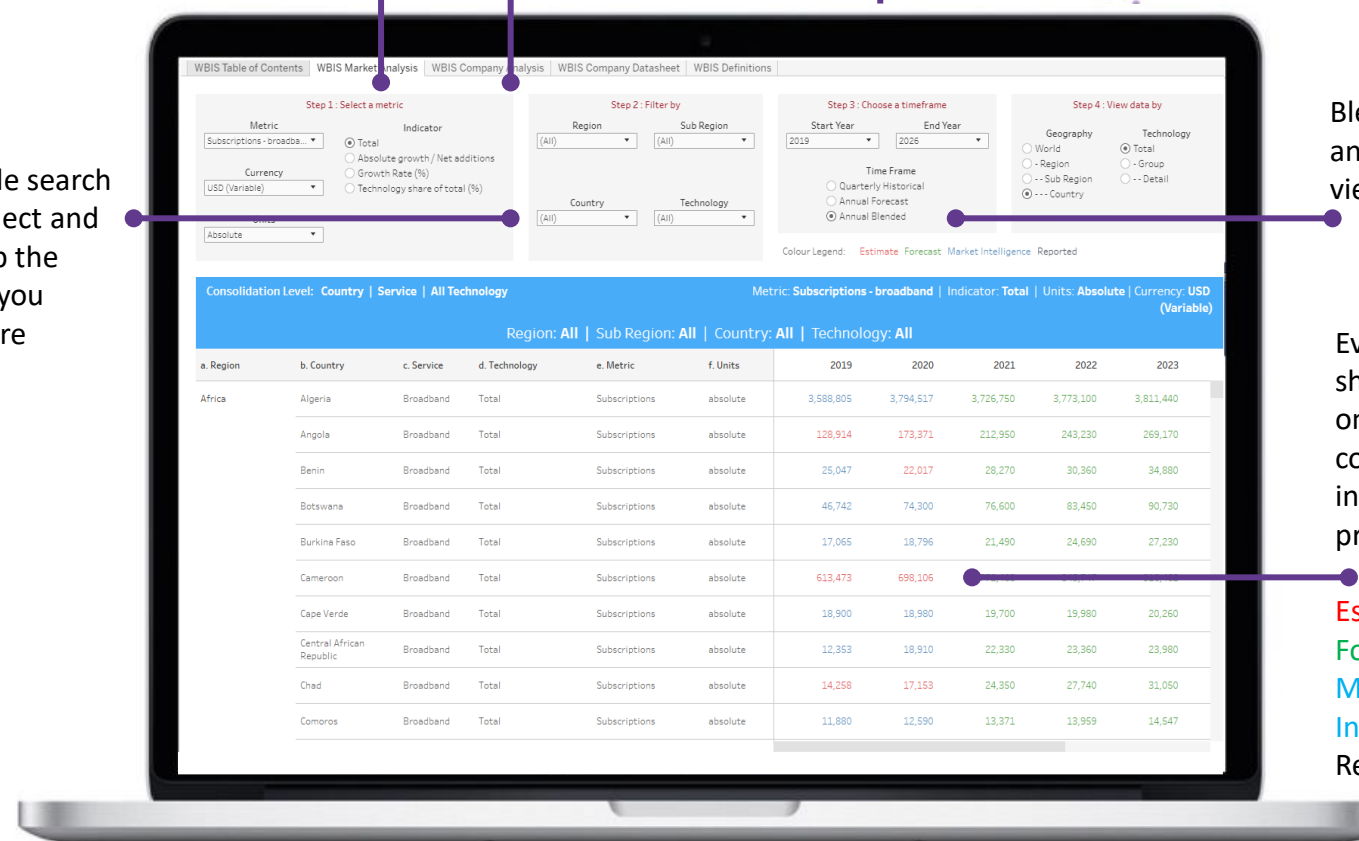
Switch between market and company views

Export data grid straight to Excel.

Blend historical and forecast views.

Every data point shows definition on hover and is colour coded to indicate its provenance:

Estimate
Forecast
Market Intelligence
Reported



WBIS Data Views: Visualizations

Interactive charts and maps for fixed markets

Configurable charts and maps showing market size, penetration, growth rates, and trends segmented by country/territory, company, service, and technology.

Export chart data to excel, or charts as images or PDF



WBIS Data Views: Benchmarks

Company KPI league tables for fixed markets

Service provider performance comparisons to help you identify and monitor outperformers globally, by region, and by country/territory

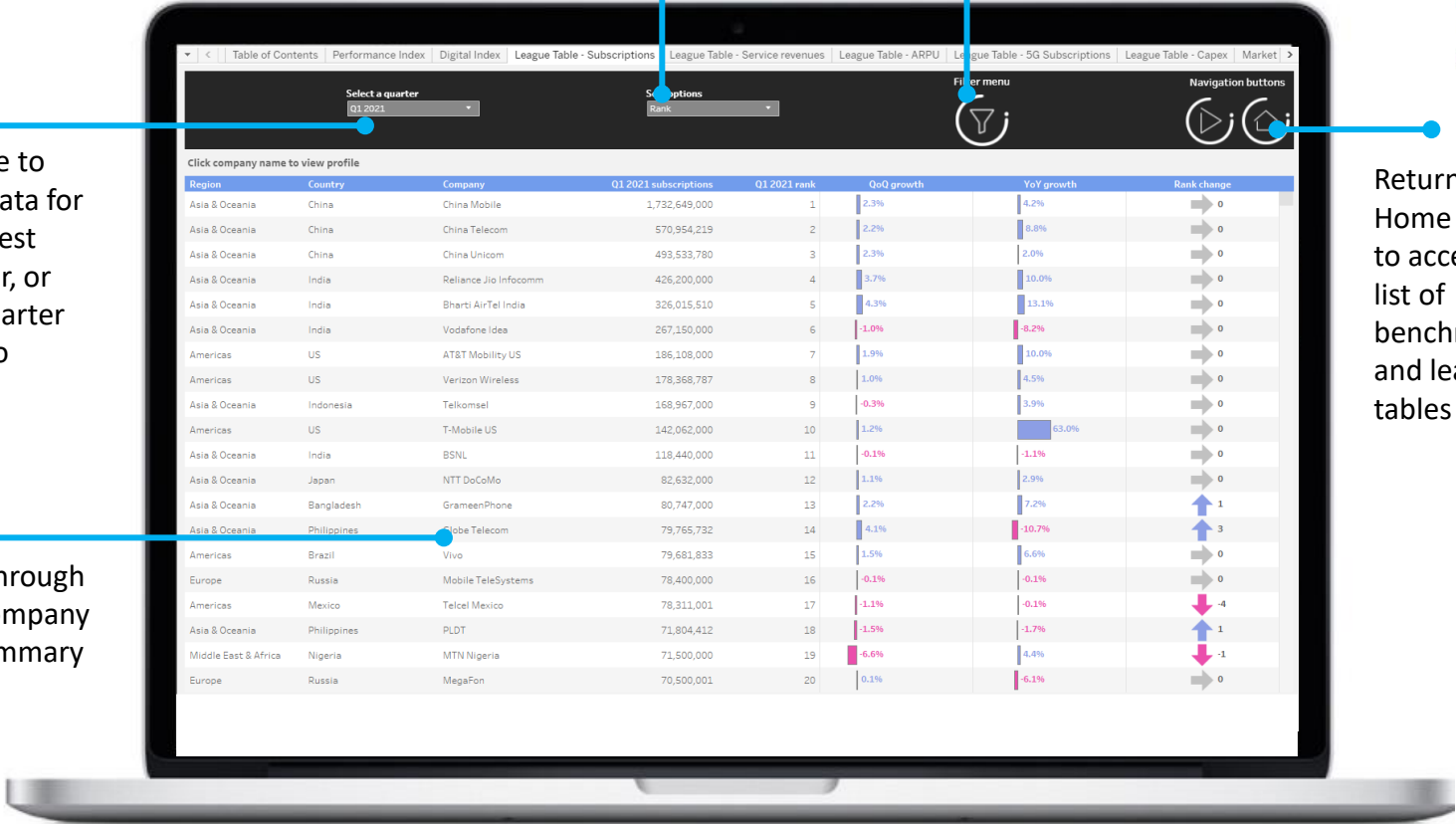
Choose to view data for the latest quarter, or any quarter back to

Click through to a company KPI summary

Choose to rank by absolute total, or QoQ or YoY growth rates

Filter by country or region

Return to Home page to access full list of benchmarks and league tables



Region	Country	Company	Q1 2021 subscriptions	Q1 2021 rank	QoQ growth	YoY growth	Rank change
Asia & Oceania	China	China Mobile	1,732,649,000	1	2.3%	4.2%	0
Asia & Oceania	China	China Telecom	570,954,219	2	2.2%	8.8%	0
Asia & Oceania	China	China Unicom	493,533,780	3	2.3%	2.0%	0
Asia & Oceania	India	Reliance Jio Infocomm	426,200,000	4	3.7%	10.0%	0
Asia & Oceania	India	Bharti AirTel India	326,015,510	5	4.3%	13.1%	0
Asia & Oceania	India	Vodafone Idea	267,150,000	6	-1.0%	-8.2%	0
Americas	US	AT&T Mobility US	186,108,000	7	1.9%	10.0%	0
Americas	US	Verizon Wireless	178,368,787	8	1.0%	4.5%	0
Asia & Oceania	Indonesia	Telkomsel	168,967,000	9	-0.3%	3.9%	0
Americas	US	T-Mobile US	142,062,000	10	1.2%	63.0%	0
Asia & Oceania	India	BSNL	118,440,000	11	-0.1%	-1.1%	0
Asia & Oceania	Japan	NTT DoCoMo	82,632,000	12	1.1%	2.9%	0
Asia & Oceania	Bangladesh	GrameenPhone	80,747,000	13	2.2%	7.2%	1
Asia & Oceania	Philippines	Globe Telecom	79,765,732	14	4.1%	-10.7%	3
Americas	Brazil	Vivo	79,681,833	15	1.5%	6.6%	0
Europe	Russia	Mobile TeleSystems	78,400,000	16	-0.1%	-0.1%	0
Americas	Mexico	Telcel Mexico	78,311,001	17	-1.1%	-0.1%	-4
Asia & Oceania	Philippines	PLDT	71,804,412	18	-1.5%	-1.7%	1
Middle East & Africa	Nigeria	MTN Nigeria	71,500,000	19	-6.0%	4.4%	-1
Europe	Russia	MegaFon	70,500,001	20	0.1%	-6.1%	0

WBIS Tabular Dashboards: Key features

Update Frequency



KPIs available in the subsequent quarter; 5-year forecasts refreshed quarterly

Consumer & B2B Splits



Fixed subscription forecast splits for 67 countries and territories

Geo Coverage



Up to 210 fixed broadband markets and 195 fixed voice markets

Currency Options



USD, EUR, local or reported currency variable and USD, EUR fixed to the last quarter

Data Transparency



Colour coding to show provenance of each data point

Metric Definitions



Shown on hover for each data point and inline in the Excel export

WBIS: Unrivalled capability and data rigor

OUR DATA CAPABILITY

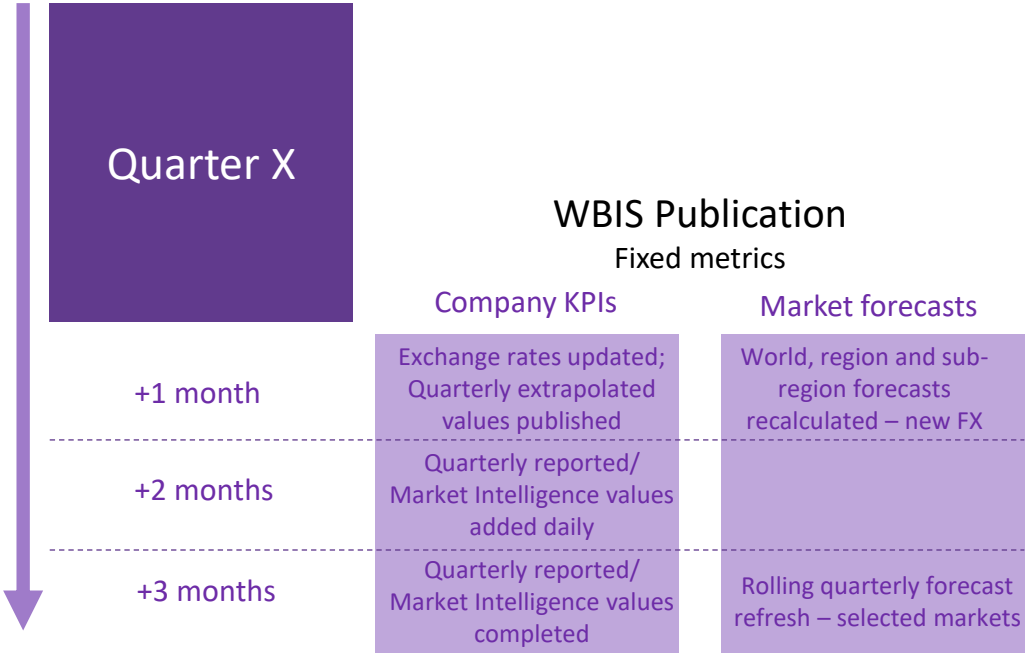
We manage one of the richest sets of telecoms data – with millions of data points spanning all key markets, some dating back to 2000.

Our dataset is built from the bottom up; updated daily by our team of “in-market” regional analysts, utilizing publicly available sources and our extensive and long-standing network of market contacts.

We standardize reported data to match consistent market definitions allowing our clients to confidently compare data and trends country by country and company by company.

Our enterprise-scale data management system enables us to robustly model unavailable core metrics (clearly indicated with color coding by source) **to deliver a complete view of a market that you can trust.**

Omdia’s unrivalled data capability allows us to be first with quarterly company KPIs and quarterly market forecasts.



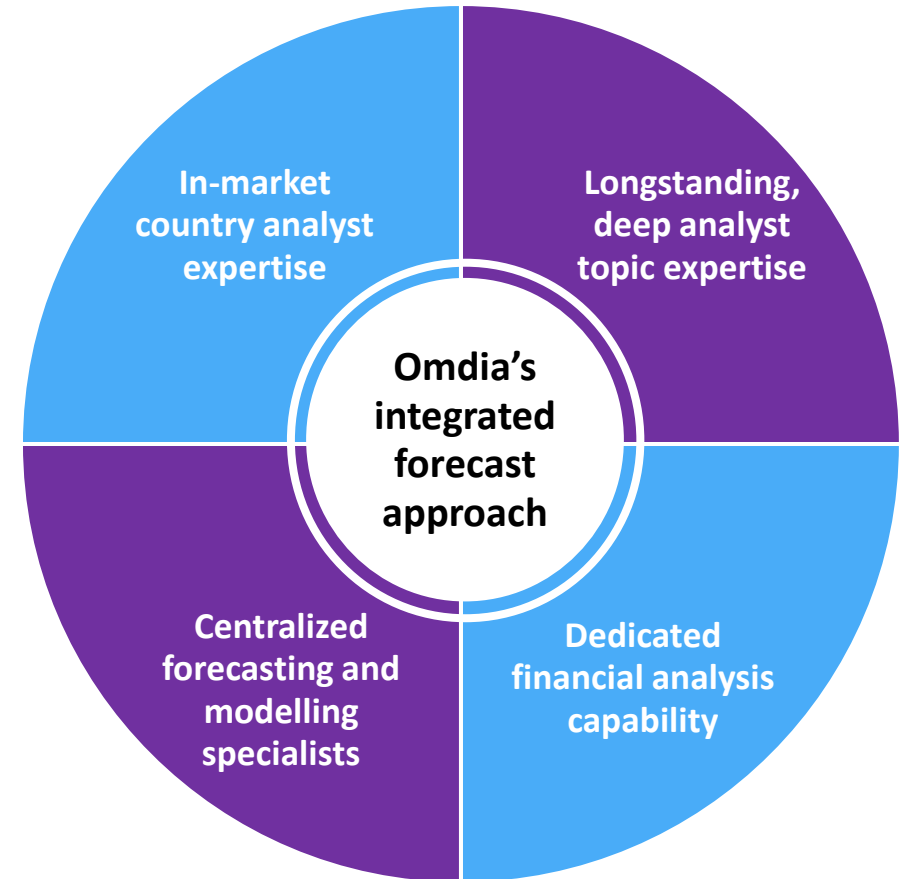
WBIS clients get the latest data to support their critical decisions.

WBIS: Unmatched forecasting expertise

OUR FORECASTING APPROACH

Omdia's forecasts are prepared as part of a collaborative, integrated process involving both quantitative and qualitative analysis.

Our forecasting approach brings together the expertise of Omdia's **in-market regional analyst team**, service provider **topic experts**, and **forecasting and modelling specialists** to develop robust forecasts across global service provider markets.



WBIS Metrics 1/2: Fixed Dashboard – Core Metrics

Fixed Data Dashboard – World Broadband Information Series (WBIS) [Up to 210 markets]

METRIC	MARKET ANALYSIS		COMPANY ANALYSIS	
	Quarterly Historical	Annual 5-Year Forecast	Quarterly Historical	Annual 5-Year Forecast
Subscriptions - Broadband	✓	✓	✓	✓
Subscriptions - Broadband - by technology	✓	✓	✓	✓
Subscriptions - Broadband - Consumer		✓ ¹		
Subscriptions - Broadband - Enterprise		✓ ¹		
Subscriptions - Voice	✓	✓ ¹	✓	
Subscriptions - Voice - by technology	✓	✓ ¹	✓	
Service Revenues - Broadband	✓ ²	✓ ¹	✓ ²	
Service Revenues - Broadband - by technology		✓ ¹		
Service Revenues - Broadband - Consumer		✓ ¹		
Service Revenues - Broadband - Enterprise		✓ ¹		
Service Revenues - Voice	✓ ³	✓ ¹	✓ ³	
ARPU - Broadband	✓	✓ ¹	✓ ²	
ARPU - Broadband - by technology		✓ ¹		
ARPU - Broadband - Consumer		✓ ¹		
ARPU - Broadband - Enterprise		✓ ¹		
ARPU - Voice	✓ ³	✓ ¹	✓ ³	
Capex - Fixed	✓ ⁴		✓ ⁴	
Total Revenues - Fixed	✓ ⁵		✓ ⁵	

Voice - Available for 195 country/ territory markets (unless stated)

Broadband - Available for ~210 country/ territory markets (unless stated)

¹ Available for 67 country/ territory markets

² Available for 137 country/ territory markets

³ Available for 126 country/ territory markets

⁴ Available for 79 country/ territory markets

⁵ Available for 133 country/ territory markets

WBIS Metrics 2/2: Fixed Dashboard – Core/Non-Core Metrics

Fixed Data Dashboard – World Broadband Information Series (WBIS) [Up to 210 markets]

METRIC	MARKET ANALYSIS		COMPANY ANALYSIS	
	Quarterly Historical	Annual 5-Year Forecast	Quarterly Historical	Annual 5-Year Forecast
Herfindahl-Hirschman Index (HHI) - Broadband	✓			
Penetration (HH) - Broadband	✓	✓		
Penetration (HH) - Broadband - by technology	✓	✓		
Penetration (HH) - Voice	✓	✓ ¹		
Penetration (HH) - Voice - by technology	✓	✓ ¹		
Household Demographic	✓	✓		
Population Demographic	✓	✓		
ARPU - Broadband - Reported (Non-core metric*)	✓			
ARPU - Voice - Reported (Non-core metric*)	✓			
EBITDA - Fixed (Non-core metric*)	✓			

Voice - Available for 195 country/ territory markets (¹ Forecasts available for 67 country/ territory markets)

Broadband - Available for ~210 country/ territory markets (¹ Forecasts available for 67 country/ territory markets)

*Country/ territory coverage varies by metric – data is only presented where publicly reported. We do not extrapolate non-core metrics to gap fill.



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Consumer 5G &
Broadband



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Service Provider
Enterprise & Wholesale

Our Expert Team – Data and Forecasting Specialists



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*Senior Director, Market
Data Analytics &
Modelling*



Nidhir Maudgalya
*Head of Market
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Shivakumari Avaradi
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Kyle McKenna
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Rafal Cynowski
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Gaurav Shukla
Principal Financial Analyst



Rolando Campos
*Head of Data Management
& Operations*



Hannah Wiggins
*Senior Data
Management Analyst*



Richard Jackson
Lead Data Architect



Hamzah Bakhat
Data Engineer



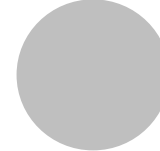
Min Lai
Lead Data Engineer



Lloyd Buss
*Lead Data Engineer
(Visualization)*



Douard Le Roux
Lead Data Engineer



Matthew Bigg
Senior Data Engineer

Related Content: Service Providers & Markets Service Area Coverage



Service Area Package: **Service Providers & Markets**

Service Provider Strategies Intelligence Service	Service Provider Markets Regulation Intelligence Service
Service Provider Americas Markets Intelligence Service	Service Provider Asia Markets Intelligence Service
Service Provider Europe Markets Intelligence Service	Service Provider MEA Markets Intelligence Service
World Information Series – Service Provider (WIS-SP)	5G to 6G Spotlight Service
World Cellular Information (WCIS) Series Spotlight Service	World Broadband Information (WBIS) Series Spotlight Service

About Omdia’s Service Providers & Markets Services

Omdia provides expert analysis and data on service providers, their markets, and the strategies for success. We can help you assess which markets and services will drive future growth, understand the changing digital landscape, navigate market regulation, benchmark competitors, and select the appropriate partnerships and business models to exploit new technologies, services and segments.

Our global team of domain and local market experts, leveraging the most comprehensive industry dataset available, will help you unlock value in entirely new and profound ways.

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

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Customer Success Manager



Kâren Dyer
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customersuccess@omdia.com



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The Omdia logo, featuring a stylized 'O' with a dot inside, followed by the word 'MDIA' in a bold, sans-serif font.

Thank you

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