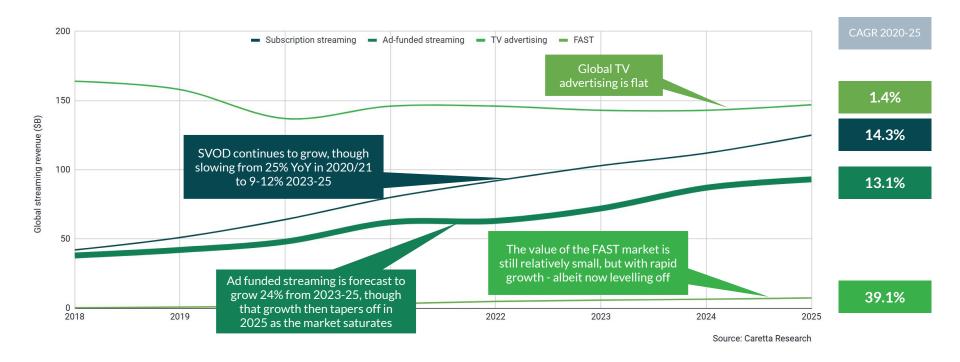


The collision of gaming and TV

Shaping the future of content consumption

Online video is driving consumer spend

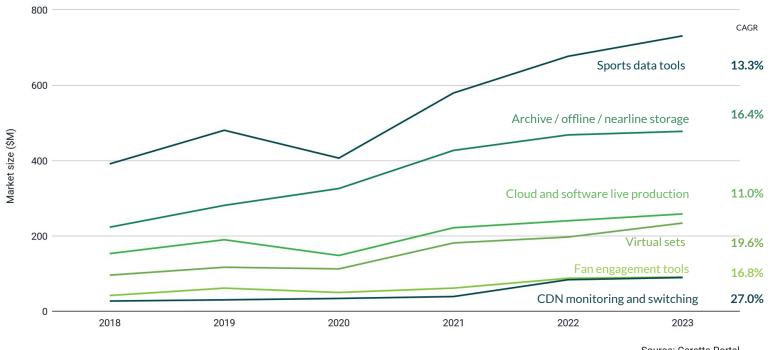
Online video revenue is growing FAST, but much of it is being captured by the global giants





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Technology enabling the gaming market steadily on the rise



Source: Caretta Portal



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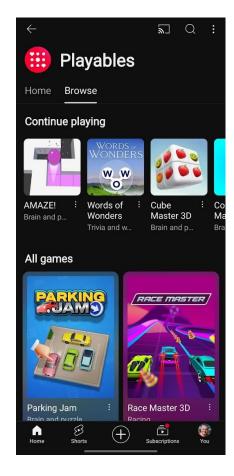
Opportunities in the market are diverse

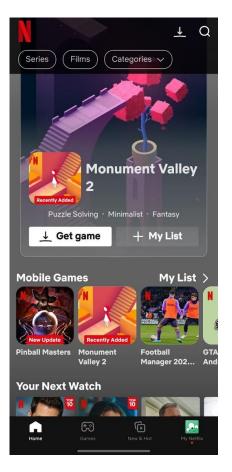
Gamification	Aggregation	Cloud gaming	Traditional services	Esports	In-house
Adding game-like elements to a stream to encourage participation. E.g. real time polls and quizzes	Subscription aggregation and device payment plans.	Console free gaming available on any compatible device. Typically delivered through a partner	Extend traditional bundled services to include device (console) payment plans, and specialist connectivity for gamers	Acquisition of rights to esports leagues and tournaments for distribution through a traditional sports workflow	Develop and/or deliver games titles in-house via proprietary solutions
Familiarity Monetisation opportunity					
Technical complexity Resource intensity					



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The streaming giants are seeing limited results







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Lessons from early adopters

Many operators are successfully running gaming products. A clear strategy is key.



Managing your tech stack

Lean on partners

Be obsessed with UX

Figure out your network strategy



Define the audience strategy

Understand gamer behaviour

Learn the subcultures

Interactivity



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Thank you

For more information, feel free to contact us:

keran.boyd@carettaresearch.com carettaresearch.com

TDT

Gaming is a significant opportunity for the market driven by the consumption of online video and the rise of connectivity enabling more interactivity, but the transition into broadcast is not simple.

- Gaming is a significant opportunity driven by the consumption of online video and the rise of connectivity enabling more interactivity
 - However due to the complexity of the market and inascent vendor community, it is still early days for what success might look like for operators
- There are many ways to skin a cat ranging in complexity and interactivity
 - The successful vendors we are seeing are offering operators solutions where they do most of the heavy lifting
 - o The needs of gamers are quite different to traditional audiences, there have been a lot of horror stories, managing risk is absolutely essential
 - No one opportunity is going to be a slam dunk
- At the end of the day, it comes back to the audience and what you can manage internally
 - Having a good UX
 - A proposition that appeals to an audience thought about in the same way as traditional content

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