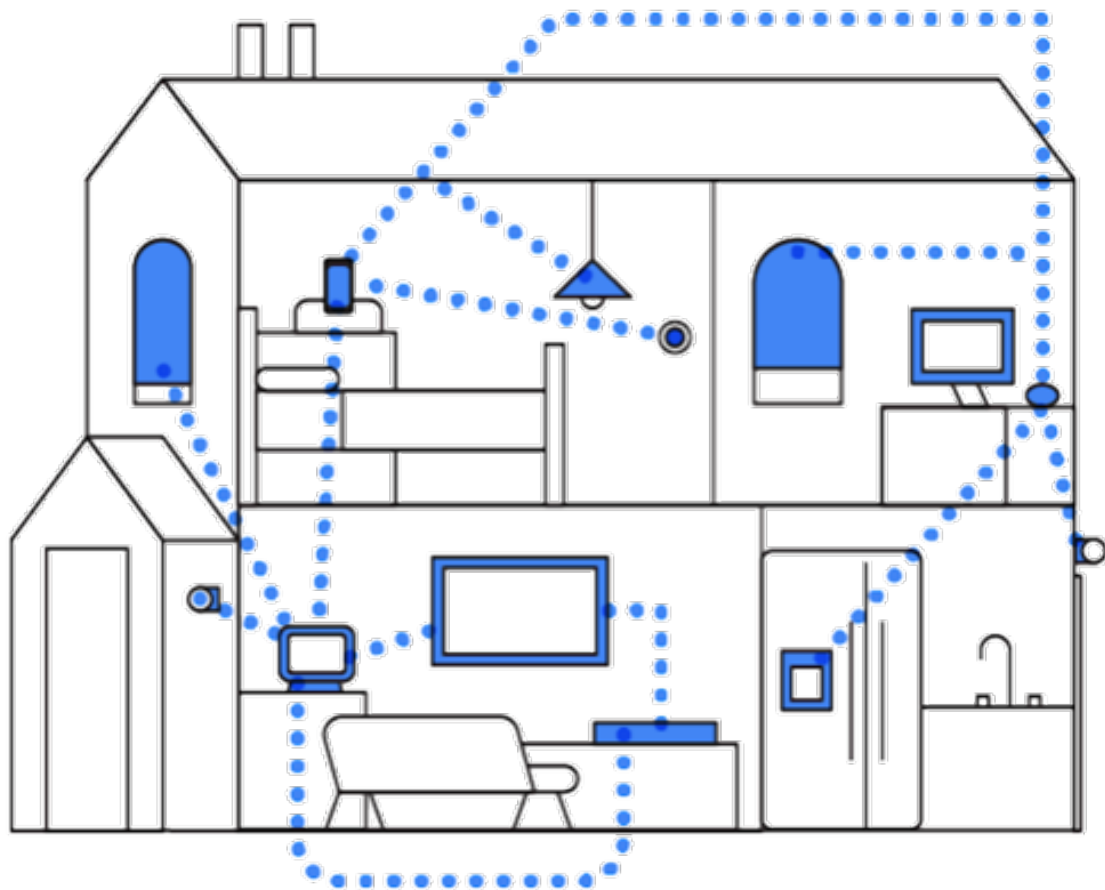


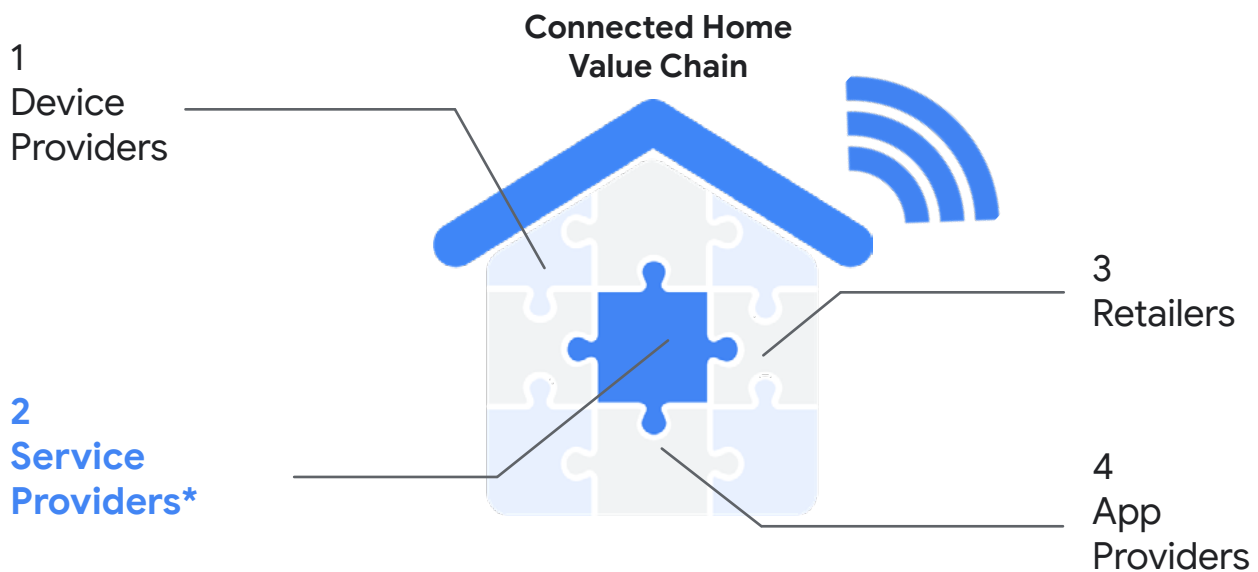
The Role of Service Providers in Bringing Connected Homes to Life in APAC



Connected Home Opportunities



Service providers are uniquely positioned in the Connected Home value chain



Competitive advantages for service providers



Strong network infrastructure and service distribution



Strong retail physical presence



After-sales service capabilities and proximity to consumers



Service providers also enjoy strong familiarity and are well positioned to solve consumer pain points

80%

of APAC consumers want a single provider for all digital needs

71%

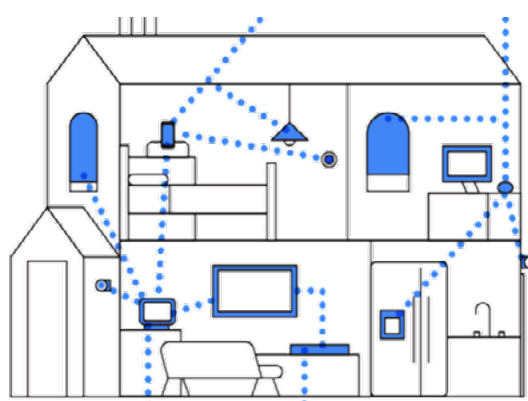
would choose Telecom companies as the service provider

Service providers include telecom companies, direct to home companies etc

Source: :Accenture Analysis based on Service Providers Annual Reports, Service Providers Landscape Reports via Statista and "The Future Home in the 5G Era" Book launched by Accenture in April 2020

Several players in a fragmented value chain is a challenge, but service providers can leverage existing synergies to become end-to-end solutioners

Connected Home Value Chain



	Device Providers	Service providers	Retailers	App providers
% rev	30%	25%	25%	20%
	Includes hardware manufacturers, API Platform manufacturers and cloud storage solutions	Product and service providers that offer fixed or wireless connectivity	Players that brings third-party Connected Home products to the market	Made up of software providers that offer paid or ad-supported solutions for Connected Home or content

Why end-to-end providers?

Strong overlaps with consumer journey and existing business

Strong record of understanding consumer needs and preferences

Service providers could address consumer pain points with key targeted actions

		Consumer Experience Today	Future Role of Service providers
Standalone Devices	Initial Awareness & Consideration	Seek different players who sell and connect devices	Consolidate products and actively educate consumers
Siloed Systems	Active Evaluation & Purchase	Define value proposition and begin high-effort planning	Use experiential retail to address issues of planning and awareness
	Post-purchase Experience & Setup	Set devices up - mainly plug and play since integration is tricky	Handle device set-up and interoperability while educating users
Integrated Homes	Ongoing Usage & Troubleshooting	Learn how to further optimise and manage multiple devices	Provide maintenance, data management and ancillary services

Source: Accenture Research & Analysis based on interviews with CMT experts, Landscape analysis & Primary Research.

Service providers could address consumer pain points with key targeted actions

Awareness & Consideration	Active Evaluation & Purchase	Post-purchase Experience & Setup
Consumer experience today Seek different players who sell and connect devices		Set devices up - mainly plug and play since integration is tricky
Future role of service providers Educate consumers and build holistic solutions addressing their needs instead of offering standalone devices Keep usability by the whole family in mind while creating awareness and promotions		Use experiential retail and consultancy (in-store/online) to provide a better understanding of the value proposition Provide an option of Do-it-for-me to manage initial setup and interoperability of devices Create community forums to encourage actual users to discuss use cases. This will help create 'Connected Home champions' Provide an option of post-purchase maintenance for complex home solutions



Service providers could work in partnerships to increase speed to market and limit capital investments

Awareness & Consideration

Active Evaluation & Purchase

Post-purchase Experience & Setup

Service providers could partner with...

Experiential Retailers

to create an in-store Connected Home experience

Design Studios

to create campaigns that address consumer concerns

Tech Companies

for complementary infrastructure like open-source platforms

Property Developers

to create Connected Home mock showrooms

OEM Manufacturers

to create pre-bundled solutions

Cloud Storage Providers

to create secure Data Management Services



