monetizing connected consumers

telemedia MAGAZINE

ISSUE 62

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MESSAGING & ENGAGEMENT

As digital retail explodes, conversational commerce goes from strength to strength

With the European digital commerce market seeing some 500 million users – that is pretty much everyone in Europe – it is no surprise that conversational commerce is riding so high.

In fact, Juniper Research predicts that total spend over conversational commerce channels will reach $290bn by 2025, rising 590% from $41bn in 2021. Communications platforms that provide the connection between brands and end users will be crucial in increasing the adoption of conversational commerce channels, it says.

This highlights that the ability to offer conversational commerce as a component of an omnichannel retail strategy will increase confidence in the channels amongst retailers. This enables these retailers to

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MESSAGING & ENGAGEMENT

How video is poised to become the next piece of the conversational commerce puzzle

Zoom Video Communications acquired Five9, a leading provider of the intelligent cloud contact centre, in an all-stock transaction valued at approximately $14.7bn – are we about to see Zoom use video to muscle in on the conversational commerce market?

Combining Five9's Contact Centre as a Service (CCaaS) solution with Zoom's broad communications platform will transform how businesses connect with their customers, building the customer engagement

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30 COMPANIES YOU SHOULD BE DOING BUSINESS WITH!

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international premiums
Central African Republic
+236
PREMIUM SPONSOR
Somalia
+252
Guinea Bissau
+245
Poland
+48
Tonga
+676
Comoros Islands
+269
Sierra Leone
+232
Guyana
+592
Congo
+242
Guinea
+224
East Timor
+670
Albania
+355
Burundi
+257
Morocco
+212
Liberia
+231
Vanuatu
+678

Conversational

<< 1

expand their reach, whilst allowing a fall back on more established commerce channels.

Conversational commerce leverages AI to automate retail transactions and payments through channels including chatbots, messaging and digital voice assistants.

The move to online for everything from shopping to entertainment to work to communications has made this inevitable, but digital commerce data from TradingPlatforms.com suggests that penetration of 60% in the European market is now the norm.

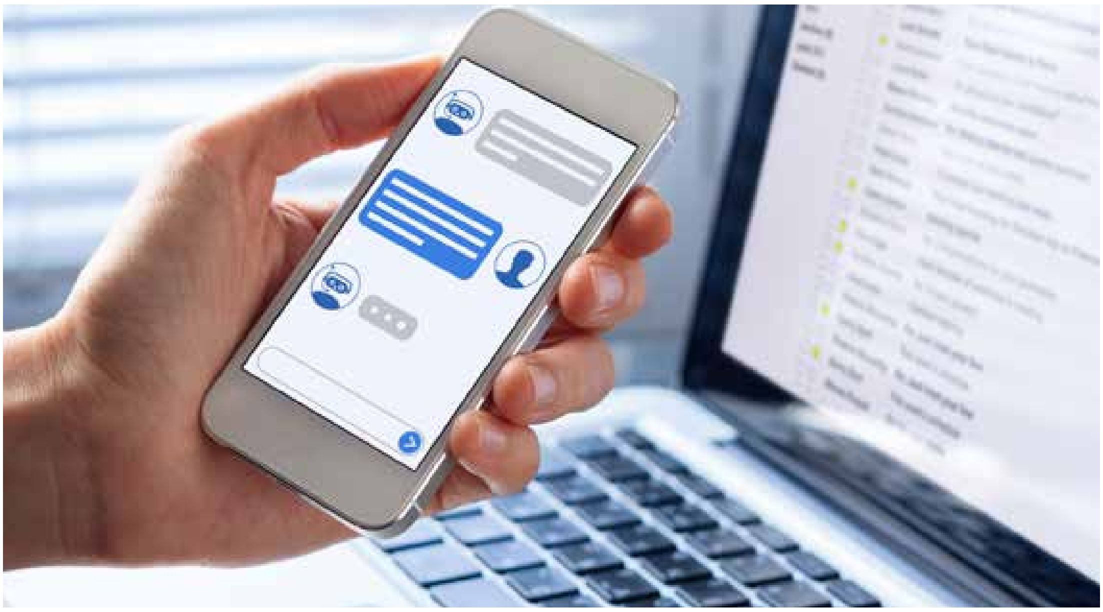
The TradingPlatforms report very specifically talks about digital commerce, with no distinction made between fixed and mobile. Given all the others stats that we have seen about mcommerce over the past 18 months, it is naturally to assume that TradingPlatforms has taken the inevitable step of lumping mobile in with all other digital commerce.

This in itself is interesting as it shows that today online commerce is pretty independent of device: consumers are doing it on the device that best suits them at the time, and so demarcation between platforms is slipping.

This boom in digital commerce is also proving a boon for conversational commerce. As more consumers are digital – through whatever device – the more brands need to interact with them through the channels of their choosing.

We have seen to date a lot of traction for moving to WhatsApp and even RCS, along with social DMs and even iMessage, but it seems that while these are all an essential part of the mix, you can't overlook SMS.

According to a study by UK conversational commerce SaaS platform Blueprint, Brands that use text messages to speak to



their audience see an average live time value (LTV) of their customers increase by an average of 26%.

The research – which surveyed over 100 leading brands across the UK and US – demonstrated that text message conversations move buyers from first to second orders more effectively, reduce subscriber churn, and improve a store's understanding of what makes customers make multiple purchases.

A separate study, again by Juniper Research, suggests that this could be a boon for RCS, predicting that the global conversational commerce spend over RCS messaging will reach $27bn by 2025; rising from less than $10 million in 2021.

This phenomenal growth will be driven by increasing RCS support from operators and growing interest from enterprises wishing to capitalise on this emerging channel. RCS is a communications protocol that enables rich media messaging services, including chatbots and in-app payments, over cellular networks.

The report identified 3 markets that will present immediate opportunities via RCS-based conversational commerce to communications platforms: namely retail, media and fast moving consumer goods (FMCG).

It predicts that low levels of regulatory restrictions and high levels of user readiness will drive enterprises in these markets to explore RCS as a commerce channel first. As a result, communications platforms must target players in these markets as a matter of priority.

Research author Sam Barker comments: "Enterprises are focused on offering services through as many channels as possible. RCS is well positioned to handle the migration of commerce activities from established channels, such as online or in app."

In addition to onboarding new service users, the research identified the need for communications platforms to partner with multiple payments providers; owing to the regional differences in payment preferences. It suggests that communications platforms focus on forming partnerships in countries in which there is already a high base of RCS-capable subscribers, such as the US, Brazil and Germany.

The report estimates that only 18% of mobile subscribers will access RCS services in 2021, however, this is anticipated to grow to over 40% by 2025; identifying the Americas as a key growth region over the next 5 years.

No surprise then that mobile carriers are keen to get in on the action. A recent study by DOCOMO finds that mobile carriers are pivoting to digital services to fight commoditisation of connectivity business and the pressure on profits amidst heavy capital expenditure on the rollout of 5G services.

In this instance, they are looking at how to bundle in OTT services – not just to tap into conversational commerce, but it must be playing a role – but could it be that the SMS services that they already run could start to generate increased revenues?

Another facet of the conversational commerce/interaction play comes from news that Zoom is branching out into corporate customer contact, with the $14.7bn acquisition of Contact Centre as a service (CCPaaS) provider Five9 (see page 1). Could we soon see conversational commerce taking a video twist?

Video

<< 1

platform of the future.

The acquisition is expected to help enhance Zoom's presence with enterprise customers and allow it to accelerate its long-term growth opportunity by adding the $24 billion contact centre market. Five9 is a pioneer of cloud-based contact centre software. Its highly-scalable and secure cloud contact centre delivers a comprehensive suite of easy-to-use applications that allows management and optimisation of customer interactions across many different channels.

It also positions the video platform ready to make a leap into connecting consumers with businesses via video. Consumers have already shown their hunger for video interaction with each other and with brands, spurred on by lockdown.

Research from Puzzel, the leading innovator of cloud-based contact centre solutions, reveals video as the future of customer service, with 45% of UK consumers interested in using video as a customer service channel, particularly for more complicated issues.

Thomas Rødseth, Chief Technology Officer at Puzzel, explains, "For businesses – especially retailers – the transition from in-person interactions to video communications has been an earth-shaking shift. We've seen video facilitate an almost seamless transition to remote working, but it has real longevity across all industries. Today, customers expect fast, seamless service across all customer service channels, from voice to email, web chat, and more. But most importantly, they expect the same level of attention, empathy and care from contact centres as they would receive in-store."

Rødseth adds: "Video enables businesses to deliver fast and empathetic customer service, and saves customers the frustration of having to describe their issues over the phone. It improves efficiencies by speeding up the resolution process, which is a win-win for everyone. It provides a friendlier support experience and boosts customer retention by helping them get more out of a business' product or service. Video is the future for contact centres as customer service teams equip themselves to deliver the level of empathy and personalisation that customers now crave."

This taps into Zoom's thinking on its Five9 purchase. "We are continuously looking for ways to enhance our platform, and the addition of Five9 is a natural fit that will deliver even more happiness and value to our customers," says Eric S Yuan, Chief Executive Officer and Founder of Zoom. "Zoom is built on a core belief that robust and reliable communications technology enables interactions that build greater empathy and trust, and we believe that holds particularly true for customer engagement. Enterprises communicate with their customers primarily through the contact centre, and we believe this acquisition creates a leading customer engagement platform that will help redefine how companies of all sizes connect with their customers. We are thrilled to join forces with the Five9 team, and I look forward to welcoming them to the Zoom family."

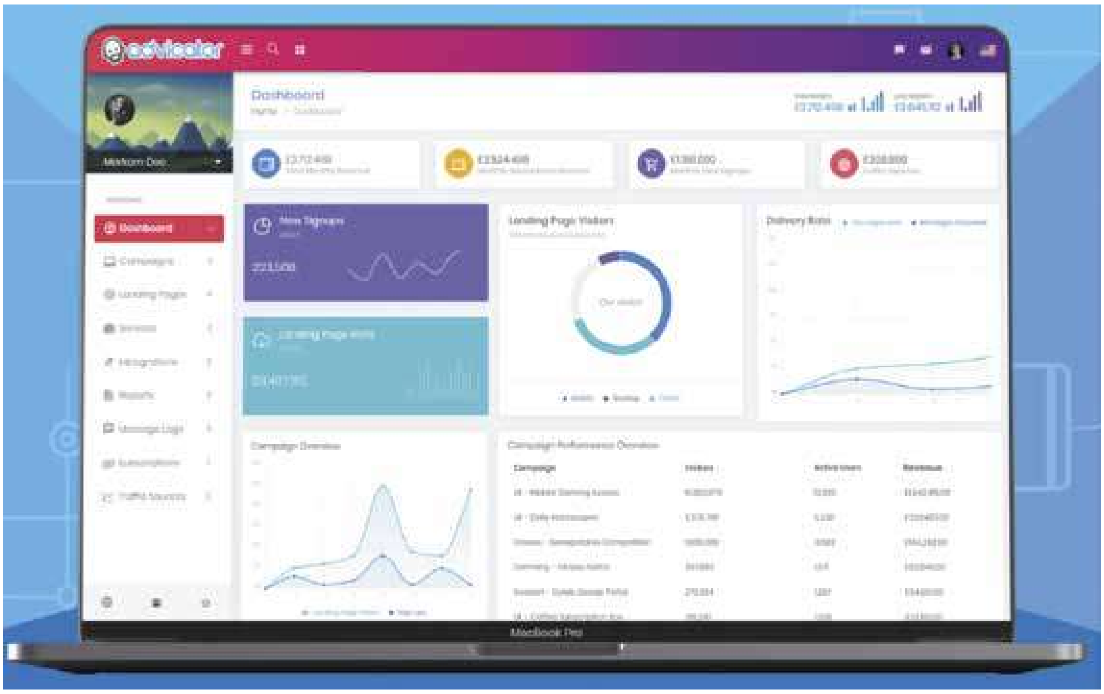
Rowan Trollope, Chief Executive Officer of Five9 adds: "Businesses spend significant resources annually on their contact centres, but still struggle to deliver a seamless experience for their customers," said "It has always been Five9's mission to make it easy for businesses to fix that problem and engage with their customers in a more meaningful and efficient way. Joining forces with Zoom will provide Five9's business customers access to best-of-breed solutions, particularly Zoom Phone, that will enable them to realize more value and deliver real results for their business. This, combined with Zoom's 'ease-of use' philosophy and broad communication portfolio, will truly enable customers to engage via their preferred channel of choice."

We have all become more than used to Zoom for business meetings – and for talking to friends and family – but could we soon see that shift to how we interact with brands? And what next: will we see the trends for shoppable messaging start to appear in Zoom customer service calls? Imagine a world where you can chat to a real person – or an AI avatar – about something and buy it, all within a video call.

This surely is the next stage in the evolution of conversational commerce; adding video and making that shoppable. It could be so rich and real-world-like that it could be a real game changer for how people shop and how they entertain themselves. Interesting times lie ahead.

All in one box

Making ecommerce simple



For businesses looking to get up and running with an all-encompassing solution to foster better consumer interaction, what could be better than getting it all in one box? Here we find out how that works

The boom in ecommerce has not only created the need for conversational commerce platforms and the integration of video into the customer engagement stack, but has also seen 'ecommerce as a service' offer growing opportunities in telemedia.

Where conversational commerce seeks to bring together the engagement channels, content and payment, ecomm as a service looks to bring together ecommerce, payments and engagement into a simple to use platform-based service that anyone can create an ecommerce business on with ease.

The idea of creating ecommerce platforms that are plug-and-play and run solely online as a service aren't new. Neither, of course, is affiliate marketing – but putting them together into a single package as a service certainly is.

Conversational commerce platforms have already shown us during the online boom that has grown across the pandemic that looking at creating the presence needed to engage consumers in new ways is now paramount. There the content and engagement has been melded with billing. Now we are seeing a shift towards also including the creation of ecommerce services to sell not only content but also real world goods – all purchased on an ad hoc basis and as needed by each client.

This move creates an end-to-end service that brings in consumer traffic, marketing and engagement strategies, billing and payment, CRM, fraud management and more in one package.

ADVOCATING ADVICATOR

One of the leading advocates of this process is Advicator, which does just that. An end-to-end revenue maximisation platform for service providers and product retailers, it offers ready-to-go payment connections, easy-to-build fast landing pages with custom billing and subscription service creation via both Credit Card and Mobile Payments. All of this is mixed is with advanced reporting, intelligent conversion rate optimisation, fraud prevention and much more.

For merchants it takes the idea of buying in engagement as a service and adds all the tools needed to create an ecommerce process on a simple to use platform.

Beyond that, it can also provide benefits right across the value chain.

The obvious area where such platforms can deliver is to content and product owners looking to create an ecommerce service that largely takes care of itself. Systems such as Advicator are designed to allow businesses to create world-class ecommerce services without having to make hefty investments in developers and coders, nor it server space and fraud prevention. Instead, the service does it all for them.

But it goes deeper than that. For mobile integration, these services also monitor the flow from advertising to point of sale and conversion. They can also then help deliver clients to merchant markets quickly and with seamless integrations to their clients. In effect, providing you with the platform's users wanting to enter the merchant's markets.

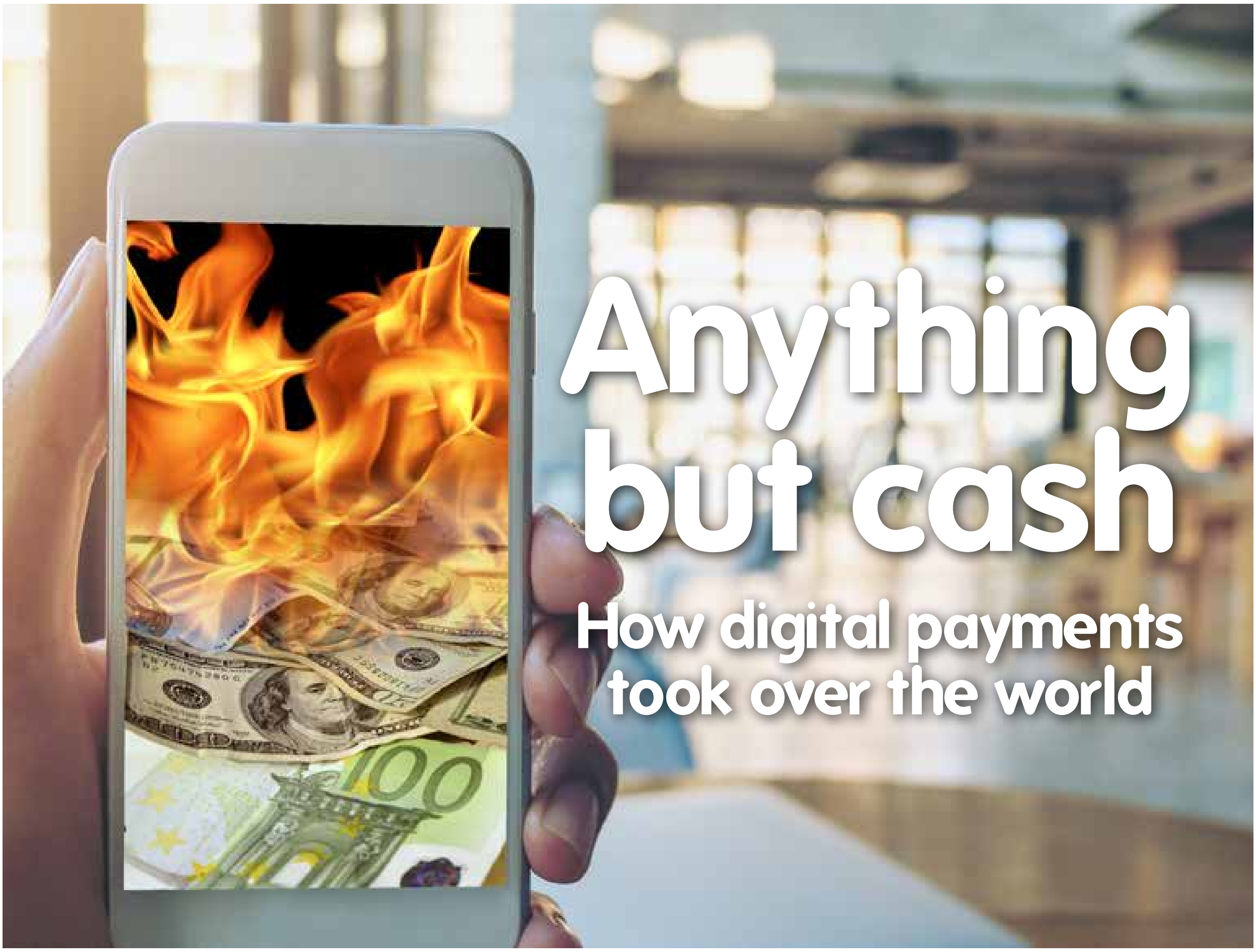
Where these sorts of services excel is in connecting the right payment methods and advertising collateral with the right merchants and, in turn, delivering the right clients to those merchants – all at an affordable cost.

Platforms such as this bring together all these tools and charge only a service fee for doing so – based on hit rates the sites created on the platform and payment attempts.

This makes it cost effective for any one from start-up to large company.

What remains to be seen is how platforms such as these join forces with other more conversational commerce orientated players to create a full spectrum of services from marketing to site creation to content to sales to engagement and marketing and on to transactions.

Together these could be some very powerful tools that could reshape the entire way ecommerce works.



Anything but cash

How digital payments took over the world

How we pay for things has changed dramatically over the past two years. While the death of cash has long been mooted, now it has come to pass. So, what is taking its place? **Paul Skeldon** reports

The key driver in how the payments landscape has changed has been consumers themselves. The pandemic forced everyone online and this has hastened the move by many to use digital payments.

While this has merely brought about the inevitable increase in use of digital payments online it has also totally changed how both consumers and merchants view money.

“We have all seen a rapid transition from a blended purchasing mix of cash, cards and digital wallets to what has now become an almost entirely ‘alternative, online and digital payments landscape’, the fast evaporation of cash purchases is clear,” says Kevin Dawson, CEO, Dynamic Mobile Billing. “In just 18 months, we have seen quite an evolution from merchants around payments. In 2019 the vast majority were happy and willing to accept cash, now a large proportion of merchants default a preference to ‘anything but cash’. Cards, wallet-based payment solutions (including mobile payments) and other digital alternative payment forms are winning.”

DIGITAL PAYMENTS AND WALLETS

Dawson’s view that mobile wallets are winning has been quantified by research by payments company Butter. It finds that digital and mobile wallets account for 44.5% of all ecommerce transactions globally and are set for continued growth across the years – rising some 7% between now and 2024.

This builds on research done by Juniper Research at the tail end of 2020, which found that the two single largest e-commerce markets, China and the US, will see volume growth in smartphone payments for remote goods of 55% and 74% respectively, between 2020 and 2025.

In China, eWallet payments are well established, with e-commerce continuing to grow, as availability and prosperity rise. In the US, OEM Pay wallets and PayPal will be the major beneficiaries of a permanent pandemic-driven shift to online shopping.

The research recommends that payment processors prioritise wallet acceptance for the most popular wallets in target countries at both the online and offline point of sale, or risk missing out on this huge opportunity.

Tim Duncalf, sales director at Telecom2, agrees. “If we look at current trends, almost all shopping that was able to be transferred from in-person to online has made that shift. While we’re likely to see many reverting back to more traditional shopping behaviours, it’s highly likely that there will be a permanent

preference for e-commerce. In this respect, all online industries could make use of the convenient payment method – consumers are shopping using their mobiles, so why not enable them to pay with the same device?"

He continues: "That being said, content is definitely king. Content driven services have seen an overwhelming growth, with a 60% increase in the amount of video content watched globally. Any online business that uses small and micro payments for either subscription or single purchases that can be utilised for wallet-based top-ups, are ideal candidates for direct carrier billing."

OPEN BANKING AND OTHER CHANGES

This shift to digital payments has also been ushered in on the back of more open banking, which in turn is going to lead to other ways to pay. This has created a raft of new ways to pay.

"Open banking offers very positive, regulated and consumer permission-based indications on the future of innovation and growth in payments," says Dawson. "It also acts as yet another very clear sign that mobile – as a payment form – must adapt now, to stay relevant in tomorrow's payment landscape."

Juniper Research anticipates that this shift to open banking will translate into rapid growth of new payment models, such as BNPL (Buy Now, Pay Later). Deploying BNPL via APIs in checkout processes will mean a significant shift away from traditional fee- and APR-based credit card models of consumer financing for online purchases, particularly amongst millennials less convinced of the benefits of credit card ownership.

BNPL also offers significant advantages to merchants as a way to increase average basket size, whilst boosting the user experience for shoppers.

Research author Susannah Hampton says: "It is critical for payment processors to prioritise

> Overall, I am actually quite encouraged by new payment developments and how new alternatives generally disrupt things

building technological ecosystems to allow the acceptance of BNPL across all payment methods, or they will be left behind by more digitally-adept providers."

THE CONTINUING RISE OF CARRIER BILLING

All this has been a boon for carrier billing. A study at the end of 2020 by DOCOMO Digital found that 40% of merchants experienced a positive outcome on their billing business due to the Covid-19 crisis, with 58% of merchants consider working with a Direct Carrier Billing Specialist in 2021. Half of them have launched DCB or plan to in 2021.

Of these, 62% indicated they are willing to invest in co-marketing efforts and bundles with an operator partner, depending on the campaign, while 37.5% expect merchants to invest in co-marketing efforts and bundles for all or most campaigns.

Dawson from Dynamic Mobile Billing believes there are a number of factors behind this: "DCB has absolutely grown and this is due to a number of factors such as regulation and mandates, the wider adoption of new handsets amongst consumers and the ever-increasing movement to 'online' purchasing behaviour."

"However," he adds, "it is still facing a number of challenges to really scale to its real potential. This is a big industry challenge to overcome, or alternatively we can simply accept we 'best serve' only some part of the wider payments system but are not necessarily suited to all."

Telecom2's Duncalf agrees: "Carrier billing definitely has its pitfalls, which impacts its effectiveness. PSD2 has introduced strict limits on how much a consumer can spend over a given period and the mobile networks – as the contracted party – manage this. Due to the nature of the beast, MNOs also take a high cut and, until the networks can treat the content owners as merchants and come more inline with other payment mechanisms, the risk of being surpassed by other billing methods remains."

However, believes Duncalf, the upsides are still enormous. "While these are definite cons, it has benefits over other payment methods, predominantly in the form of reach," he says. "It's a global phenomenon and, while regulations vary from country to country, it offers a payment solution that's accessible to the vast majority of the general public."

WHAT NEXT?

DCB certainly has a role to play and has already carved out a huge niche for itself – a niche that continues to grow. There will be other payment developments that come to play their part in how consumers make payments from their mobiles. But what will they be?

Dawson believes that the winners will undoubtedly be the solutions that can best keep the consumer relevance at the centre of its evolution and growth. "I believe that mobile payments are still only at the tip of the iceberg in regards to scope, but we need to evolve to a position for renewed creativity and innovation, as otherwise mobile payments (and specifically DCB) will rapidly become a 'burnt out' mechanic through over-regulation and restraint," he says.

Dawson adds: "Overall, I am actually quite encouraged by new payment developments and how new alternatives generally disrupt things, as this keeps marketplaces fresh and evolving. The innovations around Crypto-currency (now a regulated and formally recognised currency in El Salvador, alongside the US dollar, so will more Countries follow a similar approach?) demonstrates how markets can quickly change. The rapid decline of cash was long spoken of, but without an impetus for change. Now it has happened in less than 2 years, primarily driven by the COVID19 pandemic impact."

Bringing it all together: payments as a service, anyone?

The mega-trend in payments is payments as a service (PaaS). **Paul Skeldon** takes a look at how Boku is looking to making it simple to add whatever payments are needed

With this vast array of payment tools available and a consumer hunger for digital payments, it comes as no surprise that many merchants and content providers are wary of which to choose, in which geographies and for which services.

Payment provider Boku certainly thinks so. It has launched M1ST (aka Mobile First), the world's largest mobile payments network. The M1ST Payments Network features an unrivalled 330-plus mobile payment methods, including mobile wallets, direct carrier billing, and real-time payments schemes, reaching 5.7 billion mobile payment accounts in 90 countries – all through a single integration.

According to the World Bank, 45% of consumers globally use mobile wallets vs. just 18% that use credit cards for payments.

However, mobile payment acceptance for global merchants is highly complex, especially due to the extreme fragmentation of mobile payment methods.

M1ST solves a number of these challenges so that merchants can easily accept mobile payments, globally, and at scale, including removing the complexity of disparate technical, legal and contractual considerations, simplifying 330+ payment methods into a single, scheme-like network.

M1ST also supports the 0-tap subscriptions and 1-tap checkout transactions that enable new, online business models.

M1ST delivers merchants a single, global settlement and is capable of accepting regulated payments in nearly 50 countries.

M1ST is designed to eliminate the difficulty of mobile payment acceptance so that merchants can accept mobile payments more quickly and at lower cost.

"We've seen a fundamental shift of consumer purchasing power from west to east, from established to emerging markets, and from credit cards to mobile payments. Today, we're launching the M1ST Network to enable global merchants to acquire, monetize, and retain mobile-first consumers," says Jon Prideaux, CEO of Boku. "For merchants to capitalize on the massive potential of mobile-first consumers, they need to accept the payment methods they have and prefer, which are increasingly behind glass screens, not rectangular pieces of plastic. We've spent the past decade delivering new customers to our merchants through mobile payments. Now that mobile payments have overtaken credit cards globally, merchant acceptance has moved from a competitive advantage to a strategic imperative."

Marketing fluidity

How media and marketing are getting a much-needed make-over

Consumer habits have changed dramatically over the past 18 months, driving up digital consumption to unprecedented new levels. And with that has come the need to change how media and marketing work. **Paul Skeldon** explains

The pandemic has reshaped how consumers consume media content, which has reshaped how media companies seek to market those services – shifting from just putting it out there, to making content more interactive and easier to engage with.

The media sector has always been an area of interest to the telemedia industry and, as media has sought to become more interactive, so it has turned to telemedia companies to create the services – and initiate the messaging and payments – to make it happen.

Good news then that the media and entertainment (M&E) sector is set to grow after a difficult year in lockdown. According to PwC's latest Global Entertainment & Media (E&M) Outlook, by 2025, the UK is set to overtake Germany as the biggest E&M market in Western Europe by revenue.

After the Covid pandemic caused total UK E&M revenue to fall 5% in 2020, PwC forecasts growth will rebound 9% this year and over the forecast period at a compound annual growth rate (CAGR) of 5% outpacing the expected growth in E&M revenues at a global level.

By 2025, the UK's E&M sector is expected to be worth £88bn with only the US, China and Japan worth more globally.

Of course, how consumers consume media content has dramatically changed, with many more now streaming subscription services.

While these services are growing and generating more revenues, they are starting to impact commercial media companies that tend to rely on advertising.

For this reason, UK broadcaster ITV has become the first broadcaster to look into directly selling from its broadcast content. The service, being rolled out with the new series of Love Island on ITV2 this summer, will allow viewers using LG TVs to buy directly from the screen using their remote from programmes that contain shoppable content.

The first example will be run for UK pharmacy and cosmetics retailer Boots UK, which will be

Garnering users in Ghana

Telco MTN Ghana has adopted Out There Media's (OTM) award-winning mobile engagement technology platform, Mobucks to leverage its network of brands and brand agencies, driving advertiser interaction and engagement with its 25 million subscribers in Ghana, three times the reach of Facebook in Ghana.

OTM's proprietary mobile technology Mobucks will enable MTN Ghana to bring its customers targeted and interactive messaging campaigns from their chosen brands and agency partners. MTN's telco insights and wide reach combined with Mobucks's precise targeting and personalization capabilities will enable "micro-targeting at scale" for its future brand clients. This will yield outstanding results, including 70x better performance in terms of engagement, response, conversion and ROI compared with industry benchmarks.

Several brand partners have signed up to be among the launch partners and innovation leaders on the Mobucks platform including Cadbury Richoco, Glitz Natural Care, Mandela Mile, Marie Stopes, Mycare Mobile, Odibets and PharmaAccess. One project came from Cadbury Richoco which ran a mobile messaging campaign to raise awareness for its national educational support program "My Ghana, My Pride", by inviting school children to enter an essay competition to win scholarship funding. The campaign achieved an average Click Through Rate (CTR) of 5.5% beating current industry benchmarks for campaign engagement levels.

"Ghana has the highest mobile penetration rate in West Africa, and mobile technology plays an increasingly important role here," says Dario Bianchi, Digital Transformation Lead at MTN Ghana. "As MTN works towards becoming a digital operator by 2023, it is extremely important that we partner with the best brands to bring our customers the right content, to enhance their digital experience and enable them to enjoy modern connected life."

selling make-up featured in the Love Island show

The interactive system uses AI technology from The Take, a contextual product discovery company, which is built directly into LG TV sets in the. The service identifies and tags featured products during programmes and notifies viewers that products on-screen are available. If a viewer is interested, they can select to view more info with their remote and make a purchase via the vendor's site or a link sent to their phone.

This first-of-its-kind offering in the UK helps ITV rethink its ad strategy, making it more interactive and more targeted. It makes ITV programming suddenly look much more like shoppable online content and brings the TV broadcaster up to speed with the growing number of live stream shopping services that popping up across the web from Amazon, Alibaba and more.

And this move is now more vital than ever. Consumers have long wanted to interact and increasingly social media and online services have delivered that. TV companies risk being left behind as their ad revenues dwindle as brands look to spend elsewhere – where consumers actually are.

SUSTAINABLE ADVERTISING

This trial by ITV is something all broadcasters should watch with interest. It is also something that telemedia companies should look closely at too. Where there is interaction there is likely to be an opportunity – how can the industry monetise this, both on TV and other media?

One place to look is at the work being done by EE and WeAre8 to launch the sustainable advertising distribution platform in the UK. Through the partnership, EE mobile customers can sign up to WeAre8 via EE Up, a new platform within the My EE app that offers exclusive experiences, rewards, competitions and benefits.

By watching a brand video and answering one to three short questions, customers receive up to 20p in their EE Up wallet, and a donation of 5% is also automatically given to charity. Customers can choose to donate to a charity of their choice, helping to end food poverty and reverse climate change, or they can contribute to their monthly phone bill using the earned money in the EE Up wallet.

The billing side of thing – carrier billing in reverse – is being powered by PM Connect and the whole project shows just how radically the advertising, mobile and billing model is poised to change.

Not only does it rethink advertising – making it both figuratively and literally more rewarding for consumers, it also makes it more interactive. It also creates a much more powerful new paradigm for mobile advertising, taking it from annoying pop-ups to something that is interesting and that gives something back.

It also sees money moving back to the bill via carrier billing, further demonstrating the power of DCB in the mainstream market and in the minds of consumers.

These are interesting and significant first steps towards a new way to monetise media. But more needs to happen. Where I think its going to get interesting is where conversational commerce initiated by brands starts to interact with marketing through those channels as well as TV and other media channels. This is where the real shake up will come and it will be truly fascinating to see what new services the telemedia industry comes up with to make this fly.

COVID-19 continues to ravage the world, driven in part by misinformation and anti-vax conspiracy theories – but RCS is playing a key role in taming this 'infodemic' and making the world a safer place. **Daphne Loukas** explains

Taming the 'infodemic'

How RCS can stop the spread of COVID-19 misinformation

It's clear COVID-19 has had a devasting impact and continues to spread at an alarming rate, despite the vaccine rollout. Misinformation and confusion have continued to play a role in preventing the slowing down of infection rates worldwide. As new variants spread and infections continue to rise, a clear, direct, and accurate method of sharing information with global citizens is needed.

To address this, Out There Impact (OTI), the tech for good arm of Out There Media (OTM), and the World Health Organization (WHO), recently joined forces launch a global mobile education campaign to contain the ongoing spread of COVID-19.

More and more organisations have been looking at the best ways to engage with their audiences in more effective ways. With lockdowns worldwide, people spent an increasing amount of time on their mobile phones to stay connected to their loved ones and as a source of entertainment and information.

For the WHO, mobile messaging, in the midst of a global pandemic, became an obvious solution to reach people across the globe. So how is mobile messaging being used to reach audiences on a large scale. How is this channel helping to battle the rise of misinformation? And what have been the results so far from this campaign?

> For the WHO, mobile messaging in the midst of a global pandemic, becomes an obvious solution to reach people across the globe

THE JOURNEY TO PROVIDE LIFE-SAVING MESSAGES

The WHO has served as the leading international health agency spearheading the global response to the coronavirus outbreak. Since the beginning of the pandemic, the WHO has worked to rapidly establish international coordination, scale up country readiness and response, and accelerate research and innovation to slow down the spread of the virus.

With global lockdowns and cases spiking worldwide throughout 2020, the WHO needed an effective and precise way to reach the masses, especially during a time when COVID-19 fatigue was setting in – people were tired of hearing the same information repeated, they needed something that would catch their attention. At the same time, misinformation was proving to be one of the leading problems contributing to the spread of COVID-19. The WHO knew that to battle the rise of the 'infodemic', lifesaving information had to reach everyone in an innovative way through an innovative solution.

ENTER THE OTI

Enter OTI, who demonstrated mobile messaging as the most direct and universal medium to reach everyone, regardless of age, gender, location or device type, with a clear, reliable message.

To make this a reality, OTI brought in 15 of its mobile operator partners in Europe, Africa and Asia, all of which joined the campaign on a pro bono basis via OTI's mobile engagement technology platform, Mobucks™. By working with mobile operators, the WHO was able to benefit from their unrivalled scale and reach.

The campaign leveraged different mobile messaging formats, including Rich Communication Services (RCS), a telco-owned mobile messaging standard offering an interactive, actionable and feature-packed experience including rich media, videos, chatbots and more. Global citizens are able to interact with a chatbot providing life-saving information about preventing the spread of COVID-19, with tips, advice, and a video to stay safe during the pandemic. For those without RCS-enabled smartphones, SMS messages are used in lieu, delivering the same succinct and powerful information, particularly to the most vulnerable and harder-to-reach populations.

This is the largest mobile messaging campaign in the fight against COVID-19 in the world to date, reaching 300 million citizens with outstanding results. So far, global engagement has been stellar, with read rates via RCS messaging at 96%, engagement rates reaching 42%, and an impressive 40% of users opting in to receive more information from the WHO, demonstrating a clear willingness to keep engaging with the WHO and health-related content. For those who received the campaign via SMS messaging and system notifications, results were equally impressive, with an average Click Through Rate of 6% - that's 60 times better than the industry benchmark.

When people have access to reliable information in the palm of their hands, they are empowered to make better health decisions that not only protect themselves but also keep the global community safe. Partnering with telcos to leverage messaging formats such as RCS has proven to deliver better performance, read rates and engagements versus traditional methods of communication.

The successful results have already encouraged other global organisations to use these messaging channels for other health or emergency crises, as a way to ensure that correct, verified information is shared with global citizens.

With so many different sources of information now available online, it's critical that international organisations can connect with people directly to combat misinformation and reduce the impact of global crises like the COVID-19 pandemic on the world. Leveraging telco-owned mobile messaging is a key way to achieve this.

Daphne Loukas is CEO, Out There Impact

mVAS: success in the age of 'self media'

What does the 'self-media' age mean for the mVAS industry? We hear from the experts, who take a look at the emerging trends and regional hotspots

The age of 'self-media' is upon us: rather than organisations independent of governments creating and disseminating media content, now individuals are producing their own content, publishing it and, in some cases, starting to make money from it.

Just look at the furore around Only Fans planning to turn off adult content, despite it making a significant contribution to the self-media social site's estimated $2bn in turnover in 2020.

And naturally therein lies an opportunity for telemedia – not least direct carrier billing (DCB). According to Juniper Research in 2019, the proportion of international digital content material paid for through carrier billing, for example, will double over the five years between 2019 and 2024.

The phenomenon is global. While the Middle East and Africa are booming, there is also extensive growth in monetizable, self-media content coming out of South East Asia and Europe.

Since the appearance of self-media, more content suppliers are using this wave to introduce new optimisation factors beneath the customisable, interactive, and localised content material.

"Typically, esports, cloud gaming and e-learning are the route through which the duty can have a quicker path to success, and we're already doing it," says Derek Chow, VP of Growth at Nova Media. "As increasingly more reasonably priced cell phones enter the Middle East, North Africa and different areas, the penetration price of sensible telephones is steadily rising, and DCB will steadily exchange the standard PSMS. Furthermore, customers' demand for cell video games and OTT content material may also enhance. This area even has the chance to surpass the Asia-Pacific area, which has at all times been dominated by inhabitants."

According to Chow, infrastructure expenditure by telecoms firms and the safety and reliability of media site visitors will also be important drivers, as will affiliate marketing.

"Facebook, Google and Tiktok will proceed to develop [their] due share, however at the same time, online affiliate marketing will proceed to play a necessary function, as a result of every market is completely different, we have to settle for localised promotion companies," he says.

But it is carrier billing and how that develops that will be crucial. "As more reasonably-priced cell phones enter the Middle East, North Africa and different areas, the penetration price of sensible telephones is steadily rising, and DCB will steadily [replace] the standard PSMS," he says. "Furthermore, customer demand for mobile video games and OTT content material may also be greatly enhanced. This area even has the chance to surpass Asia-Pacific, which has at all times been dominated by its mobile users."

Likewise it will be interesting to see what happens with carrier and mobile billing and cryptocurrencies. The growth of cryptocurrency challenges the standard bank card system somewhat more than the DCB system, Chow believes. On the opposite side of the argument, the growth of cryptocurrency penetration will speed up the use of micropayments generally. Together, these forces look likely to make self-media a large revenue generator across the content space and, in turn, will look to drive the use of cryptocurrency in mobile billing and beyond.

telemedia

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FROM THE EDITOR

What the world is waiting for: World Telemedia Marbella is back

In the two years since World Telemedia Marbella last had a live outing much has changed across the industry. And with the show set to bring people together again in October, much of what they are all going to want to be talking about is in this issue of the industry's leading magazine.

Those of you who tune in to our regular podcast – and if not, why not? – will know that we have charted the changes we have seen in the past two years in great detail. Here in these pages we dive in deeper still, looking at how conversational commerce is now a key business driver for telemedia, spurred on by the relentless digitisation of commerce (see page 1).

It has also seen more engagement channels being added, with consumers now looking to not only interact through messaging and social media, but increasingly through video. With Zoom getting in on the customer service act, things here are set for big changes (see page 1).

Engagement has also played its own humanitarian role in how the pandemic has played out, with the World Health Organisation (WHO) turning to RCS to help fight misinformation around the pandemic worldwide (see page 14).

Together, all these changes have also seen payments shift to be wholly digital too, with carrier billing leading the way, but with a host of other services complimenting and augmenting this (see page 8). And one player – Boku – has brought it all together under one roof (see page 11).

All of these changes have been helped along by changes that are happening in the media and content space, which has been shaken up dramatically by the pandemic (see page 12), which in turn has seen telcos have to rethink where they sit (see page 26).

So, if you haven't bought your ticket to Marbella yet, get on and do it. Not only will be it be great to get out and about again, but there is so much to discuss you can't afford to miss it.

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Paul Skeldon. editor

MaaS transit

Mobility as a service has exploded over the past two years and is set to continue to grow. Here we look at the economics of it, what it means for the industry and some of the key services that are rolling out.

The pandemic has changed everything, from how people pay for things to what they buy. It has also changed how they travel. While many people have not being travelling to work, they have started to move around cities more and looking at new ways to do this.

Combine this with how people want quick, easy and digital ways to pay for transport and the idea of Mobility as a Service (MaaS) suddenly becomes clear. And it is something that is starting to become a key business for telemedia companies.

In fact, a recent study by Juniper Research found that MaaS will displace more than 2.2 billion private car journeys by 2025; rising from 471 million in 2021.

The concept of MaaS involves the provision of multimodal end-to-end travel services through a single platform by which users can determine the best route and price according to real-time traffic conditions and demand.

The research identified government investment in public transport and public-led partnerships between MaaS vendors and transport operators as key to incentivising adoption by consumers over the next four years.

However, it cautions that the need for mobile devices and Internet connectivity will limit adoption to developed regions. As a result, it predicts that over 70% of these displaced journeys will occur in Europe and the Far East by 2025.

THE TWO FACES OF MAAS

According to Juniper, there are two flavours of MaaS currently in play: ride sharing and shared micromobility.

It is perhaps not suprising that ridesharing is one of, if not the most popular segment of the modern mobility ecosystem, and while these systems cannot yet be considered MaaS, they have a sizable role in its future. There are countless ridesharing services around the world and their popularity among consumers is such, especially in developed countries, that traditional taxi services are struggling to compete.

The precise reasoning behind this popularity was explored in a recent study, which found that despite the convenience offered by rideshare platforms, travellers continue to prioritise three key facets of transportation services: Affordability, reliability, and accountability. Companies such as Uber and Lyft have 'successfully implemented technologies to deliver on these priorities, while taxis have largely failed to capitalize on new technologies,' explained the study's authors. 'While [ridesharing] virtually guaranteed a ride, one in five taxi riders was never picked up. Taxis were also 40% more expensive and had greater price variation. Additionally, taxi riders waited four times longer on average compared to [rideshare] services.'

This success, however, has

not achieved without setbacks. In response to complaints from taxi industry groups, numerous municipalities have attempted to restrict the growth of ridesharing companies by, for instance, imposing an upper limit on rideshare driver numbers or even outright declaring for-profit ridesharing to be illegal.

The term ‘shared micromobility’ refers to shared travel using ultra-light, single-rider vehicles, primarily bikes and scooters. Bikesharing schemes are now present in most, if not all developed countries and an increasing number of developing countries, while scootersharing schemes are gradually expanding across North America, Europe, Latin America, and Asia.

The advent of COVID-19 further boosted adoption of these schemes, as consumers without private cars eschewed public transport in favour of individual, isolated vehicles. This trend was observed across North America and Europe. In New York City, for instance, the city’s primary bikesharing scheme, Citi Bank, saw a 67% increase in rider volume, while nextbike (see panel) reported a 35% year-on-year increase in April and May 2020 in Europe.

It was China, however, where COVID-19 had the most profound effect. In Beijing, for instance, bikesharing schemes experienced a 150% increase in demand, compared to pre-pandemic levels, while data from bikesharing companies showed that the number of shared bike journeys longer than three kilometres doubled year-on-year in February and March 2020; suggesting that riders were using bikeshares to cover the whole journey, not just the first and last mile.

Due to their popularity, utility, and environmental credentials, we believe that shared micromobility is the central to the concept of MaaS, especially for bridging the first mile and last mile of journeys, where users traditionally struggle to find public transport connections.

nextbike introduces Germany-wide bike sharing with DCB-powered one-click payments

Cyclists can now be mobile and pay with mobile at the same time, as nextbike teams up with DIMOCO to offer DCB one-click payments for public bike hire.

German mobile postpaid phone customers of Telekom, o2 and Vodafone will also receive a one-time 5-euro nextbike credit at the launch.

The cooperation between nextbike, the largest provider of spontaneous rental bikes in Germany, and DIMOCO, a leading provider of the mobile payment method Carrier Billing in Europe, optimizes the user’s rental process. Spontaneous rentals are particularly encouraged as the mobile phone is always the in the user’s pocket and the spontaneous payment is completed within seconds.

The mobile payment method enables quick and easy payment, as the user is automatically verified and authorised via the mobile phone number in the background. No data requires to be manually entered. The customer is unmistakably identified by the mobile network operator and payment is billed directly to the mobile carrier bill. There is no need to register or enter sensitive data such as credit card or bank account details.

Marking the nationwide launch in Germany and in support of the joint German carrier billing payment brand “Zahl einfach per Handyrechnung”, customers of the mobile network operators Telekom, Telefónica o2 and Vodafone will receive a nextbike credit. The first ride for cyclists when paying via mobile payment option is free up to a maximum amount of 5 euro. The promotion is valid throughout Germany from July to September 2021.

“Carrier Billing is the most user-friendly payment option with the widest reach in the world,” says Clemens Leitner, Executive Vice President, Carrier & Business Development at DIMOCO Carrier Billing. “There are currently only 29 million PayPal accounts and 37 million credit cards in Germany, but in comparison there were more than 147 million mobile phone connections registered in the country in 2020. This means that almost everybody with a mobile phone contract has a potential payment method in his or her pocket without any prior registration required. Since the mobile phone penetration rate is far higher than the penetration rate of any other payment method, by integrating this additional payment method, our customers can usually for the first time really enable everyone to pay for their products and services.”

“Almost all customers rent nextbike bikes via the app. And until now, these could pay by bank transfer, credit cards and PayPal. We are delighted to now offer Carrier Billing as an additional method, promising to reach even more users than before, “says Leonhard von Harrach, CEO of nextbike GmbH. “The campaign supported by the mobile network operators is of course a great added value and we are sure that it will be well received within our community. “

> As travel returns to normal, solutions providers must look to maximise the benefits of their services, by offering as many transport modalities as possible through their platforms

MAAS TO DISRUPT TRAVEL ECOSYSTEMS

The new report, Mobility-as-a-Service: Business Models, Vendor Strategies & Market Forecasts 2021-2027, anticipated that, as the pandemic wanes, MaaS solution providers should view the increasing demand for travel as an opportunity to disrupt established transport provision ecosystems by demonstrating the cost-effectiveness and efficiencies of their platforms.

Research author Adam Wears explains: “As travel returns to normal, solution providers must look to maximise the benefits of their services, by offering as many transport modalities as possible through their platforms. Therefore, signing partnerships to maximise the value of their MaaS offering must be considered the highest priority.”

SIGNIFICANT ENVIRONMENTAL BENEFITS

By displacing a high volume of car journeys, MaaS will also generate a saving of CO2 emissions worth 14 million metric tons in 2025; rising from 3 million metric tons in 2021.

However, the report predicts that increasing electrification of private taxis and buses is essential to realise this growth in carbon emission reductions over the next 4 years.

To achieve this, it urges increasing investment into electrification technologies from governmental bodies, to accelerate adoption amongst public transport operators to benefit from lower-emission vehicles sooner.

Everything's gone green

Sustainability and green issues are impacting every facet of life – and the telecoms sector is no exception. Here **Paul Skeldon** takes a look at some of the ways the industry is going green and why

Everything's gone green sang New Order in the 1987 single of the same name and now the telecoms industry is singing much the same thing. According to analysts at GlobalData, telco marketing will be dominated by espousing the green credentials of the of the industry.

And already Vodafone has stolen a march on its competitors, announcing that its network is set to be powered by 100% renewable sources from 1 July 2021.

Meanwhile, Nonvoice, the world's first 5G app agency, announced last month the signing of PowerMarket, which has developed a turn-key solar asset management platform that allows 5G network operators to fully control the process of solar power management that will save them up to 90% of their time and resources.

About time too. While consumers have embraced sustainability and have 'gone green', most industries have been slow to catch on. The telecoms – and the wider world of the internet for that matter – is a massive user of energy and these initiatives are to be applauded.

The internet – of which telecoms networks are a vital part – is a hungry beast. According to the International Energy Agency (IEA), data networks consumed around 250TWh in 2019, or about 1% of global electricity use, with mobile networks accounting for two-thirds.

Based on current efficiency improvement trends, electricity consumption is projected to rise to around 270TWh in 2022. That's a lot of computers doing their thing.

To put that into some sort of perspective, Bitcoin alone uses more electricity than Argentina, according to analysis from Cambridge University.

The trouble is the internet is invisible to users. Unlike gas, electricity, water or any other utilities you can't see it and don't really experience its mechanics as that all happens miles – often thousands of miles – away on distant shores.

Part of the massive use of energy associated with digital tech lies in growing app usage. And this seems far from abating. According to App Annie it's been another record-breaking quarter for global spend on mobile — increasing by $2bn since Q1 2021

Esports too is also on the rise, driven by a surge in use in China, with investments in China in Q1 2021 amounted to ¥1.42bn, passing the total amount of investments made in 2019 – ¥910m.

But consumers are starting to become aware of the way energy is being used. I guess they had a lot of time on their hands during lockdown and, bored, started to wonder how the internet works. And it works by drinking power.

It also guzzles materials – and has weight. Data is stored in trapped electrons in transistors and, while storing data doesn't change the number of electrons present, those that are trapped – so those taking part in data storage – are at a higher energy level.

Using Einstein's famous equation, E=mc2, to covert energy to mass, the internet weighs about the same as a large plum. However, it is doubling in size every few years and so soon it will be a bunch of grapes, a hand of bananas... where will it end?

More worrying is that the material needed to store all this data is also finite. It is stored on materials and, at current growth rates, half of all atoms on Earth could be involved in data storage by the year 2245.

So, well done to Vodafone – and the wider telecoms industry – for addressing the power challenge. It is a great start, but only the start of a very long journey into a much larger problem of where do we put all that data and how do we keep the little green server lights on.

Do not blame your office cleaner... but she might be involved. PBX hacking is back on the agenda with some estimates putting it at a $3.64bn global problem. So, for those of you too young to remember, here's how it works and what can be done about it

Who is talking on your office phone system and racking up costs of, say, $30,000 in a weekend? The sum could be different, but if you have asked this question at least once, then PBX Hacking fraudsters have been using your system.

PBX hacking is a huge fraud risk for enterprises & telecoms and leads to enormous revenue losses. According to the Communications Fraud Control Association (CFCA), in 2019 PBX hacking was the #1 telecom fraud method, causing

The enemy within?

External and internal threats can jeopardise company security. One internal threat you might not have thought about, however, is the staff themselves. That's not to say there's a hacker in your mix, but clicking on a sketchy email, not updating passwords, or connecting to too many public networks are all ways your workforce could be opening up your network to cyber villains.

According to Nick Galov and Hosting Tribunal, the stats around corporate hacking are sobering:

- There is a hacker attack every 39 seconds
- Russian hackers are the fastest
- 300,000 new malware is created every day
- Multi-factor authentication and encryption are the biggest hacker obstacles
- You can become an American citizen for $6,000
- The average cost of data breaches will be about 150 million in 2020
- The cybersecurity budget in the US is $14.98 billion.

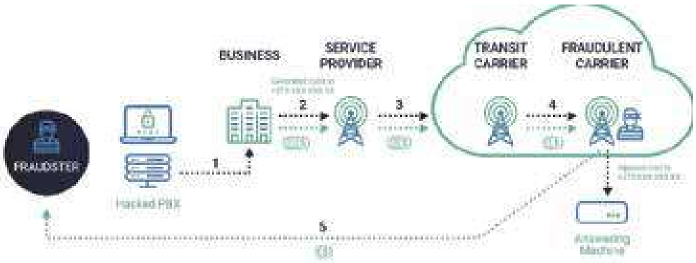
a global fraud loss of $3.64 billion USD. This dwarfs subscription fraud, service abuse and many other fraud tropes that are hitting the headlines.

WHAT IS IT AND WHY DOES IT HAPPEN?

A PBX (private branch exchange) is a private telephone network within a company that connects the business to an external network of an operator.

PBXs have been popular for decades but like most technologies, they have evolved over time. Although traditional PBXs on TDM lines are still common, many PBX systems today are IP-based. Whether they are IP or circuit based, PBXs are a prime target for voice fraud.

Hackers will trawl the internet using specially designed scripts, looking for vulnerabilities in a VoIP users firewall - like an open port. Once a weakness is detected, the hackers will try and authenticate their access and gain control of a PBX system.



Nowadays, PBXs (both IP or circuit-based) are considered an easy target for fraudsters because users are often unaware of the threat that PBX hacking poses and fail to implement even basic fraud protection.

For example, the PBX users don't change the default passwords provided by switch vendors that are easily available online and in user manuals (here is the office maid might have play in).

HOW IT WORKS

There exist two main fraud scenarios for PBX hacking:

- Pumping generated traffic through the victim PBX
- Pumping natural traffic through the victim PBX

It's important to notice that although the second scenario is less popular with fraudsters, PBX hacking with natural traffic isn't so easy to detect.

Here, we consider the fraud scheme from the first (most popular) scenario.

1. A fraudster hacks a PBX (or IP PBX) of a business
2. Using that PBX, the fraudster generates telephone calls to +373 XXX XXX XX and passes them through a service provider
3. The service provider sends this traffic through its transit carrier
4. In the chain of transit carriers, the traffic passes to a fraudulent carrier that hijacks these calls connecting them to an answering machine (without passing the calls to the real subscribers) and, thus, bills them
5. After the fraud attack finishes, the business originates a payment flow, for example, by the time the fraud is discovered the evidence of PBX hacking has been destroyed by natural log cycles to save storage space; or the fraud is never discovered at all. That reaches the fraudulent carrier, who shares the profits with the initial fraudster.

HOW FRAUDSTERS MAKE ATTACKS MORE DIFFICULT TO DETECT

- Disguises of statistical patterns of traffic (to look like natural traffic)
- Sustained simultaneous calls: if an antifraud system is not signaling-based (for example, cannot monitor active calls and break them), then the presence of an attack can be detected only after the fraudulent calls have finished
- Dynamic hijacking of calls (for example, calls are hijacked for a very short time period, making it impossible to find the presence of a hijack via test calls).

OUTCOMES OF FRAUD ATTACKS

As most antifraud systems are CDR-based, cannot break active calls, and have poor performance with traffic disguised with statistical patterns, attacks can last for hours and may not be detected at all. T

his can lead to enormous financial losses for a business (up to hundreds of thousands of USD per attack).

Even if a company successfully stops a payment flow, it faces reputational losses, as well as losses related to dispute process arrangement (it also negatively affects every carrier in the chain).

What requirements the PBX antifraud solution should meet:

- Handles every scenario of PBX hacking fraud (including pumping of natural traffic through the victim PBX).
- Detects and stops PBX hacking attacks quickly in real-time (as FMS is a signaling-based system).
- Effectively identifies PBX hacking attacks even if fraudsters try to disguise statistical patterns of traffic and make the attacks difficult to detect (the points mentioned above).

Building better DCB traffic for STC Kuwait

STC Kuwait had seen a rise in mobile content and advertising use, but with it came a rise in DCB Advertising and payment fraud. Here's how it tackled the problem

In 2018, a rise in DCB complaints prompted STC Kuwait to consider its strategy to safeguard its consumers from potential DCB advertising and payment fraud.

According to its data, 90% of consumer complaints were categorised as 'transaction unknown'. When diving deeper into this, STC Kuwait found that half of these were payment fraud and half were ad fraud or misleading ads.

STC and its Aggregator partner IDEX, selected MCP Insight to implement the advertising monitoring system 'MCP Scanner', to target misleading advertising and bad experience consumer journeys. This was followed in 2019 by the introduction of MCP's anti-fraud system 'MCP Shield'.

Within 12 months of working with STC, advertising compliance increased from 40% to 98% and has remained 95% or above ever since, while other network operators in the region averaged between 59 and 72%.

MCP Shield implementation blocked payment fraud and within 12 months fraud traffic attempts have reduced from 65 to 30%. At the same time, the number of active brands on STC has grown.

"Working with STC and IDEX, to implement an anti-fraud and compliance monitoring system, gives assurance that the transaction is legitimate and provides sustainable business growth," says Toby Padgham, MCP Insight.

Subscriptions: what do consumers really want?

What do consumers really want from their mobile phone paid services – and how can the industry shift to meet those demands? Here we take a look at what a survey of 1000 UK consumers think and what it means for the industry

Phone-paid services continue to evolve. They are now used by consumers that want to access blue-chip brands, charity donations, app stores and many other service providers.

While it is such a well-used payment mechanic, we wanted to know if consumers are happy with the services and the regulation supporting it. Do they want more regulation? Or less? UK industry trade body aimm set out to find out.

CURRENT REGULATION

The current regulations, from November 2019, insist that services gain robust consent from a consumer and always use a two-stage authentication process.

New regulation has been proposed that would go further than this and would result in consumers having to:

Sign up through a robust 2-stage authentication process, such as entering a pin code

Get a monthly reminder message with information about how to unsubscribe

Automatically have the subscription cancelled after 12-months and need to sign up again, using a similar 2-stage process

Is this what consumers want, do they feel the current regulations are not strong enough? Or will the proposed changes disproportionately affect people with a passive happiness of a service?

To find out, aimm commissioned Mobile Squared to undertake the largest ever survey on digital subscriptions. In June 2021 a panel of 1,000 unbiased consumers – evenly split by age group, gender and location – was asked its views.

WE WANT LONG-TERM RELATIONSHIPS

The research found that consumers are happy and comfortable with digital subscriptions – 75% had subscribed to Netflix, for example. They are also confident that they are not hanging onto subscriptions they no longer want or need – only 1.5% thought that might be the case.

Not only is it normal for people to have digital subscriptions, but it is normal for them to happily hold them over the long-term. If we go back to Netflix again, 70% of people have subscribed for over 12 months. While for charity donations that figure is even higher – 75% of people have subscribed to a regular charity donation for longer than 12 months.

"For charities, the value of a donor giving a regular donation by a subscription is huge. Not only do they receive the money, but they don't have to spend marketing money to obtain a new donation," says Chris Newell from Donr. "The charity world is concerned that having to end these subscribed donations after a 12-month period will dramatically reduce revenues, especially at a time when the sector feels as if they have already been hit hard."

WE WANT CONTROL

The research found, quite categorically, that consumers want to be in charge of their own subscriptions – and to have the power to cancel them when they choose. From our survey, a resounding 90% of people felt that ending a subscription should be their own decision only.

With fixed-term subscriptions that automatically cancel, consumers can often lose any entitlements they have built up, or have to renew on worse terms, or sometimes both. On top of that, most of them are designed to tie the consumer in to the fixed period (usually 12-months), even if they want or need to leave earlier.

Consumers don't want either of those practices brought across to mobile or digital subscriptions, especially when they are happy with the current systems and level of regulation.

"Considering the robust regulation, which is reflected in the current PSA and MNO complaints data, consumers sign up to services when they want to – with a firm opt in to a service and, very importantly, are regularly reminded of their opt in so they can make the decision as to when they end those services," says Rob Weisz, from Fonix. "The Phone-paid services industry has got a great opportunity here to demonstrate that it is at the forefront of consumer choice and transparency for the digital subscription market."

WE WANT REMINDERS… LESS OFTEN

While regular reminders are good and supported by consumers, reminders that are too frequent can create a negative effect – the opposite of what is intended.

Regular, but unnecessary, reminders, that require no action from the user are effectively training consumers to ignore the messages they receive from the service providers they have subscribed to.

This means that when one is actually sent, they are more likely to miss an important message that does require action.

> This research demonstrates that consumers are happy with the current levels of regulation and don't want or need any more

Over half of all consumers – 57% – no longer want monthly reminders, but instead for the reminder to be sent out between quarterly and annually.

The concept of an annual reminder for subscription services – an 'information only' message that highlighted that you were still subscribed, but didn't need any actions from the consumer if they wanted to keep the status quo – was considered to be a good idea. Overall 97% thought that it would be beneficial.

"We want to make sure that any regulations protect consumers, but also don't put onerous requirements on them," says Joanna Cox, aimm. "This research demonstrates that consumers are happy with the current levels of regulation and don't want or need any more."

WE WANT… TO MAKE A RECOMMENDATION

Based on the result of our research of 1,000 consumers, aimm would like to make the following recommendations regarding digital subscription services:

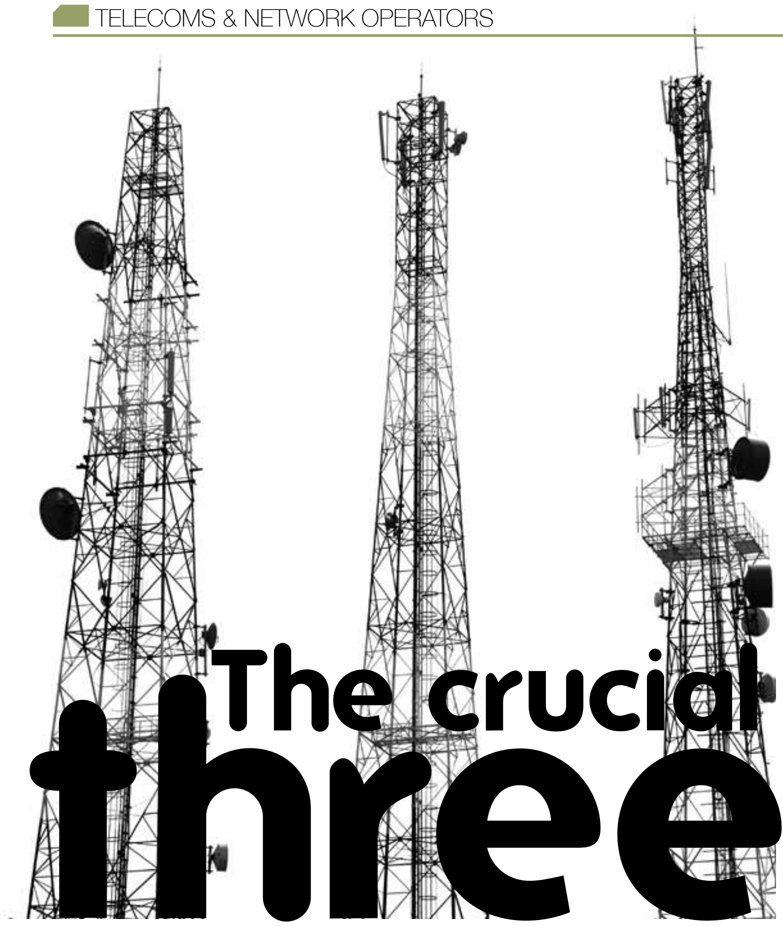
Consumers want to be in control – so allow them to start and cancel subscriptions as they choose and not insist on fixed-terms

Consumers want reminders – they just don't want or need them as frequently as they are currently being sent them

Consumers accept multi-year subscriptions – consumers are very comfortable with digital subscriptions and the multi-year aspect of them, so we need to recognise these timeframes in our approach to managing these relationships

These recommendations will allow regulation to guide and protect consumers and avoids imposing unwanted actions and processes on them.

Download the report at https://aimm.co/reports/



The crucial three

Kevin Westcott, Vice chairman, US Tech, Media & Telecom leader Deloitte, takes a look at the three key trends in telecoms for the post-pandemic world

In media and entertainment, the pandemic has accelerated many trends that were already underway.

Theatres are and consumption of streaming content continues to rise. We've seen growth not just in the number of subscription services, but also in ad-supported models designed to satisfy increasingly cost-conscious consumers.

Whatismore, customer retention (versus acquisition) has become top of mind—making it important that providers offer a broad range of content: video, music, games, and even podcasts.

This new reality places a premium on understanding consumer behaviour patterns and developing a more nuanced approach to engaging with customers. As consumers experiment with their entertainment options, we strongly encourage providers to adopt new strategies and agile approaches for content development, aggregation, and delivery.

We expect that telecoms companies will continue to provide the bedrock for other industries to recover and thrive in 2021. Telecom providers have an opportunity to shape a new future for businesses and consumers on the strength of advanced wireless technologies such as 5G. We believe that the move to next-generation networking has the potential to transform how industries operate—creating competitive advantage and unlocking new opportunities for innovation. telecoms providers should help their customers envision what is possible through new 5G-enabled use cases that can truly disrupt their industries.

So what trends is the industry facing?

RENEWING THE FOCUS ON CUSTOMERS' NEEDS

Streaming providers should move past simply focusing on cost and content by becoming more nuanced in their customer engagement. To improve retention, they should address customers' challenges and preferences though content windowing, tiered pricing, tailored services, and social experiences.

The implications for M&E companies are clear: customers want tailored options in terms of content and pricing. Therefore, while the availability of original content is typically critical for attracting customers, a broad content library and tiered pricing (including free, ad-supported offerings) are increasingly essential for retaining them.

To achieve success in 2021 and beyond, streaming providers should meet their customers where they are, both financially and with highly desirable content. This may mean that having great original content won't be enough in the long term and they should offer a broader array of other entertainment services as well.

To address consumers' concerns about the cost of streaming services, providers are increasingly offering ad-supported video streaming services (AVOD) as an alternative to paid subscriptions.

According to Deloitte's Digital media trends survey, 47% of American consumers are watching at least one free ad-supported streaming video service, such as Pluto TV, Tubi, and the Roku Channel (18% growth since the pandemic began).

Sixty-five per cent of respondents to Deloitte's Digital media trends survey say they're comfortable watching ads to eliminate or reduce subscription costs and that, given a choice, they prefer ad-supported options for watching streaming video services.

In addition, 37% say they appreciate the broad range of shows and movies available on free services.

CONVERGING AND REMIXING ENTERTAINMENT

The COVID-19 pandemic has accelerated consumers' willingness to experiment with their entertainment options. The hard lines that used to exist between content and distribution channels are increasingly blurring. The coevolution of entertainment and technology is helping fuel new service offerings and entertainment bundles for consumers—necessitating new strategies and agile approaches for companies and creators.

Of course, no one knows how the coming months will further shift viewers' actions and preferences. And newly established digital movie-viewing trends (and success stories) have raised new questions around movie releases, particularly with studios experimenting with releasing films exclusively to certain direct-to-consumer streaming services.

Will premium video on demand (PVOD) become a viable alternative release method for all or just some cinematic productions? Is there a balance to be struck that supports theatre owners and studios? Will PVOD have long-term consequences for the economics of film production?

The COVID-19 pandemic and its impact on the movie industry has challenged the typical notions around theatrical launches. In the future, studios will probably take a portfolio approach to movie distribution rather than a one-size-fits-all strategy.

The pandemic also helped boost the popularity of esports on social media. In addition, early in the pandemic, esports helped fill the void created by the disappearance of traditional sports on television. One event, the eNASCAR iRacing Pro Invitational Series on Fox Sports 1, attracted 1.6 million unique viewers — certainly respectable for Sunday afternoon cable TV programming.

Esports delivers several key benefits to television networks, including the ability to attract younger audiences (19% of millennials watch virtual sports), establish a foothold in the online world versus alternatives like Twitch and YouTube, and evolve as providers of interactive live content.

Another trending remix opportunity is the online "watch party"— groups of people viewing movies and other video content together on their favourite social media platforms. By late June 2020, almost one- fifth of US adults aged 18 and older had participated in a watch party, according to market research firm Maru/Matchbox. Nearly two-thirds of those who had hosted watch parties said they'd had one within the past month.

MONETISING ADVANCED WIRELESS NETWORKS

Although consumer and enterprise adoption of advanced wireless technologies like 5G is still nascent, the shift to next- generation networking is undeniably underway. The key for telecom providers is determining how they can leverage these new technologies to create new products, services, and business models that drive revenue growth.

5G capabilities have the potential to revolutionize every industry, from manufacturing to health care to government. To enable the full promise of advanced wireless technologies like 5G, telecom providers should do more than simply deliver the communications network—it's essential that they bring together all of the required capabilities as well. This often involves integrating edge computing capabilities with a variety of Internet of Things (IoT) devices, such as sensors.

5G connectivity and edge computing go hand in hand: 5G networks migrate computer processing (typically hosted in the cloud) closer to the edge where data is generated, analyzed, and acted upon. The edge can be located anywhere, including on-premises at an enterprise location. Together, 5G connectivity, compact computing power, and AI combine to create the intelligent edge, a versatile foundation for unlocking the full potential of IoT and Industry 4.0.

In the retail industry, the intelligent edge can enable powerful use cases such as smart shelves, cashier-less shopping, digital signage, dynamic pricing, and contactless shopping. In addition to enhanced retail experiences, the intelligent edge is expected to fuel use cases such as smart warehouses and virtual medicine.

According to ABI Research, syncing of edge servers with telecommunications infrastructure represents a $54 billion opportunity by 2024.

Kevin Westcott is Vice chairman, US Tech, Media & Telecom leader Deloitte
Download the full report at https://www2.deloitte.com/content/dam/Deloitte/us/Documents/technology-media-telecommunications

Six trends reshaping the wholesale voice carrier market

The global wholesale voice carrier market is poised to expand substantially, thanks to smartphones and VoIP. **Pankaj Singh** assess the latest data and points to the key trends

According to a recent study from market research firm Graphical Research, the global wholesale voice market is expected to make a significant headway between 2020 and 2026 on account of the trending commercialisation of 5G technology worldwide.

Due to the augmenting adoption of smartphones, VoIP traffic is growing. The use of mobile internet and data-intensive voice calling applications are responsible for the rising VoIP needs. As investments pour in across the global telecom industry, expansion of telecom infrastructure and networks is likely to foster opportunities for the global wholesale voice carrier market forecast.

The following six trends are accelerating the industry forecast.

LEASED NETWORK DEMAND IN NORTH AMERICA

The deployment of leased network infrastructure is growing across North America. In the highly competitive telecom industry, tier-2 and 3 providers have been leasing network capacities to a considerable extent from tier-1 operators. They have been doing so to benefit from the minimal cost of ownership to maximise profitability.

North America wholesale voice carrier market share from leased network segment is anticipated to grow at a 10% CAGR up to 2026. The growth can be accredited to the growing need for leased network in VoIP call termination in the region. Prominent telecom operators are leasing a part of their network for setting up voice termination facilities across emerging markets.

TRANSMISSION SWITCHING TECHNOLOGY IN NORTH AMERICA

The wholesale voice carrier industry share from transmission switching segment accounted for more than 50% of the total North America market during 2020 and is slated to expand further. The considerable dependence on traditional voice calls in the lesser developed North American regions is driving demand for the technology.

Rural areas face the challenge of limited wireless network availability. Since a large percentage of the rural population relies on traditional voice calls, the use of transmission switching is likely to expand through 2026. Several wholesale voice providers are offering minimal cost and time of installation, optimal life of switch, and unitized configurations.

ADOPTION OF INTERCONNECT BILLING SOLUTIONS IN ASIA PACIFIC

Interconnect billing solutions are gaining traction throughout Asia Pacific. The key reason these solutions are becoming mainstream is that telecom operators find convergent billing systems useful in accelerating digital transformation. The APAC industry share from the interconnect billing segment is slated to grow at a 10% CAGR through the assessment timeline. By 2026, total APAC wholesale voice carrier market size is expected to surpass $7 billion.

INCREASING TELECOM FRAUDS IN ASIA

The alarming rise in fraud frequency across the regional telecom sector is influencing Asia Pacific wholesale voice carrier market. The requirement for fraud management solutions is growing due to this trend. As per the 2019 data published by Trend Micro, a Japan-based cybersecurity firm, the annual cost from telecommunications subscription frauds was estimated at $12 billion, equaling between 3% and 10% of the gross revenues of regional operators.

Asia Pacific wholesale voice carrier industry share from the fraud management segment is expected to rise at a 12% CAGR through 2026, promoted by the surging focus toward fraud prevention. In order to ensure reduction in losses, the significance of these solutions is gaining popularity.

GROWING SUBSCRIPTIONS FOR VOIP SERVICES IN EUROPE

The number of VoIP subscriptions are augmenting across European countries. The preference for VoIP-based calling is growing amongst regional subscribers due to the tendency to avoid the higher costs associated with traditional voice calls.

The industry share from the VoIP segment in the region will register around 13% CAGR through the next five years. VoIP-enabled wholesale voice carrier services provide enhanced technologies to telecom companies, simultaneously eliminating the unnecessary charges associated with roaming.

GRADUAL SHIFT TO VOICE TERMINATION IN EUROPE

Europe wholesale voice carrier market size is slated to reach $11 billion by 2026, thanks to the presence of a robust commercial network infrastructure in the region.

Since voice termination involves substantial routing costs and international call termination across multiple networks, wholesale voice providers can benefit from significant opportunities provided by this solution.

The region is seeing a shift from conventional voice and data services to more profitable and efficient solutions provided by regional wholesale voice termination service providers. Europe wholesale voice carrier market share from voice termination segment is expected to represent more than 70% of the total industry by 2026.

Pankaj Singh is Assistant Manager – Content, at Graphical Research

Games within frontiers

Gaming has exploded across 2020 and 2021 – and Europe leads the way. We take a look at how that has happened and what it means for telemedia

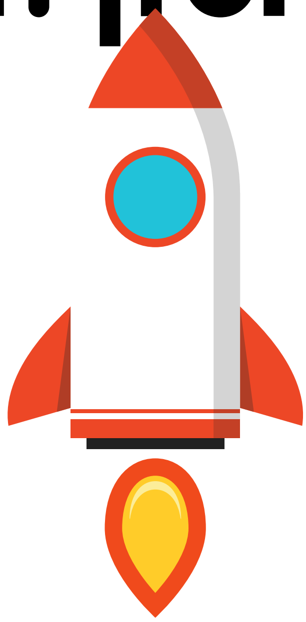
Over the last couple of years, mobile games broke records and made billions in revenue. In 2020 alone, the entire market surged by 25% YoY and hit a $95.1bn. However, as more and more players choose mobile devices to play games, the entire sector will continue growing strongly. Why is gaming so strong?

According to data from MejoresApuestas.com, more than 2 billion people are expected to play mobile games by 2023, a significant increase compared to pre-pandemic figures.

There are several reasons why mobile games are the fastest-growing segment of the entire gaming industry. They are convenient, simple, fun and allow gamers to play them wherever they are, which can't be said for desktop or consoles.

In 2017, more than 1.1 billion people were playing mobile games, revealed the Statista survey. By the end of 2019, this figure rose to nearly 1.4 billion.

Statistics show more than half a billion people have started playing mobile games since then, with the total number reaching 1.8 billion in 2021. By 2023, this figure is expected to grow by



another 200 million.

The Statista data revealed that mobile gamer demographics are also changing and evolving.

What was true about gamers just a couple of years ago is much different now. Around 55% of mobile gamers in China and the United States, as the two leading markets, are aged between 18 and 34 years old. Millennials or people aged between 25 and 44 make approximately 24% of all users in these two mobile games markets.

However, statistics show the two largest mobile gaming markets globally have around 20% of users aged between 45 and 64 years, more than much younger Gen Z members, or those aged between 18 and 24 years.

Besides impressive user base growth, the mobile gaming industry also witnessed a huge revenue increase, especially after the COVID-19 struck.

Between 2017 and 2019, revenues jumped by 31% to $75.9bn. Last year, when millions of people turned to mobile games amid the COVID-19 lockdown, this figure surged to $95.1bn and continued growing.

Statistics show the global mobile games industry is forecast to hit a $109.6bn value this year and then jump by another 25% to nearly $138bn by 2023. By, 2025 the entire market is forecast to hit over $160bn value.

As the two leading markets, China and the United States, are expected to generate around 56% of total revenues that year.

WHY IS EUROPE THE FRONTRUNNER IN IGAMING DEVELOPMENT?

The iGaming industry has been one of the most dramatic growth areas in the global economy this century and it continues to expand rapidly, providing opportunities for technological producers, business investment and iGaming customers. And one continent: Europe, is unquestionably at the forefront of iGaming development. So why does Europe lead the way?

MARKET SIZE

No other area of the world can compare to Europe when it comes to the size of the iGaming market. According to figures from 2018, online gaming revenue generated by European Union operators totalled £22.2bn. By 2022, this figure is expected to reach £30bn. To put that into a global perspective, the European iGaming sector accounts for nearly half of the world's gambling market, and that market size is a reflection of legal, cultural and technological factors.

These days, Europeans access their online gaming through a variety of methods, whether that is using mobile gambling apps on their smartphones or through desktops, tablets or iPads. However, many nations within Europe have gambling traditions that go back centuries.

The United Kingdom and Ireland have both been home to a thriving gambling tradition. Rizk is a UK licensed casino, but is just one of many such online operations in the UK, which exist alongside land-based casinos, sports betting shops, bingo halls and amusement arcades. France has a similarly long history of gambling, though it is historically based around casinos, rather than sports betting.

It is true that historically, gambling has been restricted in many European countries, but the social and economic liberalization that has taken place over the last few decades, accelerating since the end of the Cold War, means that there are legal iGaming sectors in all of the major European nations. Five of the top 10 gambling nations, based on individual gambling activity, are located in Europe. The continent is also the wealthiest in the world, making it the perfect place for iGaming companies to operate and develop their technology.

IGAMING EXPERTISE

This long-established, legal gambling market, along with the wealth of European consumers, has made Europe the ideal place for iGaming companies to base themselves. This has, in turn, led to increasing investment in iGaming technology. Many of the world's foremost iGaming developers are located in Europe, particularly in the Scandinavian countries, where the combination of a historical gambling culture and a culture of technological innovation has proven profitable.

The result is that European iGaming brands can offer their customers extensive game rosters, which are backed by the technology of some of the world's best software providers, while their approach to attracting and retaining customers has long been tried and tested.

While other parts of the world, such as Singapore, Macau and Las Vegas, operate as casino gaming hubs, Europe has a number of iGaming centres, with the Mediterranean island of Malta being a particularly good example of the specialization that has enabled Europe to lead the way.

Malta is sometimes referred to as the iGaming capital of the world. This is due both to the high number of iGaming operators that are based in the country, and the extent to which the iGaming industry dominates Malta's economy. The Malta Gaming Authority (MGA) is one of the world's most respected gambling authorities, authorising betting licenses to operators across Europe. Along with the UK Gambling Commission and the Gibraltar Regulatory Authority, the MGA is widely respected for the high level of requirements it imposes on license holders.

This regulatory expertise is another aspect of Europe's iGaming dominance. Operators that apply for a license with one of the main European gambling authorities are required to adhere to strict rules in a number of areas, including data protection, customer security and fairness, which makes the European iGaming market the most secure and reliable in the world.

CHALLENGE FROM US

While Europe may currently lead the way on iGaming, that lead is not guaranteed to last as other jurisdictions aim to boost their own iGaming sectors. The most significant of these challenges could come from the United States, which has recently seen a dramatic upheaval in its gambling sector.

The striking down of the 1992 PASPA Act in May 2018 paved the way for US states to legalize sports betting and many have done so. iGaming is not yet legal in most states in the US, but many experts regard this as only a temporary restriction, and once iGaming is available to all US citizens, the wealth and size of the US market could see the US become a new iGaming leader.

Meet the PEOPLE

İgor Kholin, Golden Goose

Golden Goose has been specialising in mobile content offers for more than 16 years. Since 2016 it has become a global mobile CPA network and official authorised agents for promoting the entertainment services of mobile telecom operators in more than 40 countries around the world. Here, its co-founder, **İgor Kholin**, discusses how the digitisation of the world during the pandemic is a boon for the VAS market and how it propels DCB into every facet of online life

Which countries or regions do you feel represent the greatest opportunity for telemedia?

Recently have become members of the WASPA association in South Africa, and now are actively developing and connecting countries from this region. The potential of this region is huge. The total population has long exceeded 1 billion people. There is no wired Internet at all in most African countries and this entire billion uses wireless channels from telecom operators to access the Internet.

Over the past 10 years, Africa has become second only to Asia in terms of economic growth, which averaged 4.9%. So, the potential for the development of telemedia services in this region is huge.

Asia-Pacific, however, has slowed. 5G will be implemented faster there than in other regions, then users with fast Internet will have more opportunities, and therefore there will be more needs for telematics services in general and mVAS services in particular.

Which content and/or applications do you see being the most likely to benefit from telemedia billing and marketing tech?

The almost total global expansion of mobile communications allows us to consider telemedia billing as the most accessible and mass financial technology, and this is a very significant factor for using DCB as the main financial technology for OTT services in regions where bank acquiring is still insufficiently developed. This also applies to music streaming platforms and the leaders of this segment, such as Spotify and Apple Music.

In addition, the gaming industry continues to be one of the key beneficiaries of DCB technology. This can be explained by the fact that the smartphone has become a key gaming terminal, and DCB is most deeply integrated with it, which makes it the preferred method for carrying out gaming microtransactions.

It is also important to mention that the growing popularity of wearable electronic devices, and, as a result, health and fitness services, and the simplicity and accessibility of DCB give it almost unlimited opportunities for growth.

Do you think that Direct Carrier Billing can become mainstream and in which markets?

It is obvious that DCB can become mainstream in entertainment services, from OTT to music streaming for micropayments.

However, there are serious obstacles to this. First, the uncompetitive financial policy of the operators themselves. These payment commissions significantly exceed the similar rates of Visa, Mastercard and other payment systems.

Secondly, the spread of alternative payment methods like Google Pay or Apple Pay, which are deeply integrated into mobile devices and allow users to make both contactless payments offline and payments in one click on websites and in applications. Such systems are serious competitors for DCB technology, and the growth of their use online is a significant challenge for telemedia billing.

In addition, DCB can take an important place in the ecosystem of digital services which can be used by the state or city services in order to interact with the population. Such examples already exist in Sweden, where DCB is used as a mainstream technology for paying for parking.

What are the key drivers and inhibitors for growth?

In a global sense, the main driver is the digitalisation of all services, and DCB is used as one of the available technologies for monetisation. Undoubtedly, it is unlikely that DCB will become mainstream, but the technology will inevitably receive its benefits from the global growth of digital services.

Nevertheless, if we look a little into the future, we can assume that the Pay-as-you-Go subscription model, which is already popular today, will go beyond digital services and become mainstream.

There are already many examples of pay-as-you-go offline, such as Michelin, Volvo, Gillette, and many other brands are beginning to experiment with this format. Therefore, DCB, as one of the most popular technologies, will be very much in demand within the framework of such a business model.

The B2B sector is also going to be increasingly important as a DCB market.

As I said earlier, one of the key constraining factors is the policy of regulating the DCB market by telecom operators. This also applies to the financial separation of market participants, as well as high barriers to the use of such technology by new services.

Moreover, the low activity in the promotion of DCB technology by operators, in addition to the problems mentioned above, is greatly reducing the potential for the distribution and popularisation of Direct Carrier Billing.

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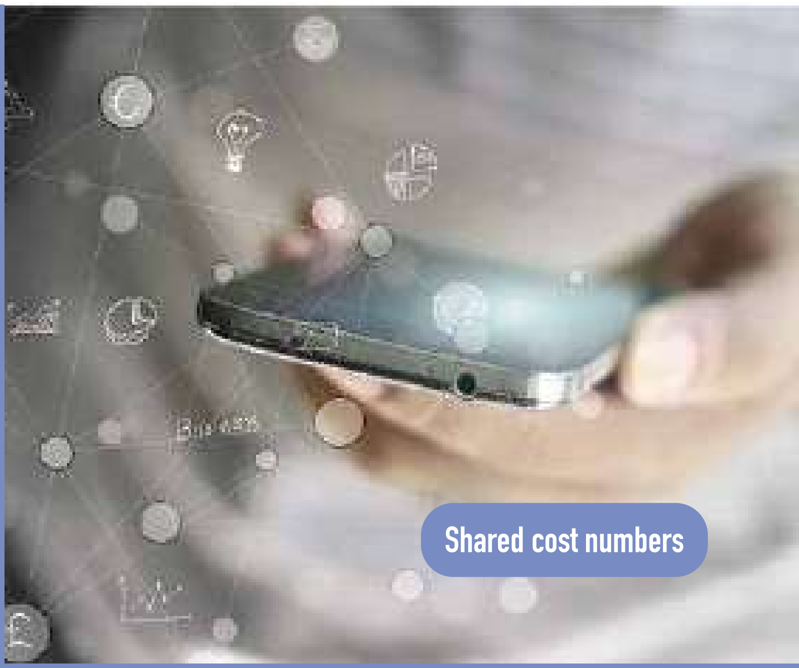

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