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QoE Analytics Market Forecasts to 2034 – Global Analysis By Component (Software and Services), Deployment Mode, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global QoE Analytics Market is accounted for $5.2 billion in 2026 and is expected to reach $14.8 billion by 2034 growing at a CAGR of 13.9% during the forecast period. QoE analytics refers to software platforms and services that measure, monitor, and optimize the quality of experience for end-users across digital networks. These systems integrate network analytics, performance monitoring tools, customer experience management solutions, and predictive analytics to assess service delivery. By analyzing traffic flows, content performance, and user behavior, QoE analytics enables telecom operators, OTT platforms, and enterprises to ensure reliable connectivity, optimize bandwidth allocation, and enhance customer satisfaction across diverse applications, including streaming, gaming, and enterprise communications.

Market Dynamics:

Driver:

Rising OTT streaming demand

Explosive growth in over-the-top video streaming consumption, combined with subscriber expectations for consistently high-definition playback quality, is compelling telecom operators and content delivery networks to invest systematically in QoE monitoring platforms that can pinpoint network bottlenecks responsible for buffering events and resolution degradation. The proliferation of 4K and 8K streaming content,

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live sports broadcasting, and cloud gaming platforms has elevated quality sensitivity among consumers willing to churn to competing providers following repeated poor experience episodes. Enterprise SaaS application providers are similarly adopting QoE analytics to meet service level agreements requiring real-time application performance visibility across geographically distributed user bases.

Restraint:

Data privacy compliance burden

Stringent data privacy regulations under the European General Data Protection Regulation, California Consumer Privacy Act, and emerging national digital privacy frameworks restrict the collection, storage, and processing of granular end-user behavioral and network activity data that QoE analytics platforms require for accurate experience scoring and root cause analysis. Telecom operators face compliance costs associated with implementing data minimization, consent management, and pseudonymization requirements that can limit the analytical depth achievable from user-level QoE monitoring programs. Cross-border data transfer restrictions create additional complexity for multinational operators deploying centralized QoE analytics platforms that aggregate subscriber experience data across multiple regulatory jurisdictions simultaneously.

Opportunity:

5G monetization analytics requirement

Commercial 5G network deployment is creating new QoE analytics requirements as operators seek to differentiate network slice performance for enterprise customers paying premium prices for guaranteed latency, reliability, and throughput commitments under customized service level agreements. The ability to measure and report per-slice QoE metrics in real time is becoming a contractual requirement for enterprise private 5G deployments in manufacturing, logistics, and healthcare verticals where mission-critical application performance directly affects operational outcomes. QoE analytics platforms capable of providing slice-level visibility are emerging as essential monetization infrastructure enabling operators to demonstrate premium service differentiation and justify higher enterprise contract pricing across their 5G commercial portfolios.

Threat:

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Open-source platform competition

The growing maturity of open-source network monitoring frameworks, including Prometheus, Grafana, and OpenTelemetry, is enabling large telecom operators and cloud-native content providers to build customized QoE analytics capabilities internally, reducing dependence on proprietary commercial platforms and compressing average selling prices across the market. Technology-capable operators with dedicated engineering teams can assemble capable QoE measurement stacks from freely available components at marginal infrastructure costs, creating competitive pressure on commercial QoE analytics vendors to continuously differentiate through AI-driven predictive analytics, pre-built telecom vendor integrations, and regulatory reporting automation features that pure open-source approaches cannot match without substantial in-house development investment.

Covid-19 Impact:

Pandemic-driven surge in remote work, home learning, and entertainment streaming created unprecedented network traffic volumes that exposed QoE monitoring gaps across operator infrastructure, accelerating emergency procurement of analytics platforms. Post-pandemic hybrid work persistence has sustained elevated enterprise application QoE monitoring demand. Operators that invested in advanced analytics during the pandemic period now leverage those platforms for proactive 5G quality differentiation and subscriber retention programs.

The services segment is expected to be the largest during the forecast period

The services segment is expected to account for the largest market share during the forecast period, due to the growing preference among telecom operators and content providers for managed QoE analytics services that transfer operational complexity and platform maintenance responsibilities to specialized providers. Professional services engagements, including QoE methodology design, probe deployment, KPI framework customization, and analytics dashboard configuration, generate high per-engagement revenues from network transformation programs. Managed services contracts providing continuous QoE monitoring operations, incident response, and quarterly performance benchmarking are creating predictable recurring revenue streams for QoE analytics vendors serving mid-sized and regional operators lacking internal analytics expertise.

The cloud segment is expected to have the highest CAGR during the forecast period

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Over the forecast period, the cloud segment is predicted to witness the highest growth rate, driven by the scalability advantages of cloud-native QoE analytics architectures that can process petabyte-scale network telemetry data streams from 5G distributed radio access networks without requiring on-premises hardware infrastructure. Cloud deployment models enable elastic scaling of analytics compute resources to handle peak traffic analysis workloads during major live events, product launches, and seasonal demand surges. Software-as-a-Service delivery models are lowering adoption barriers for regional operators and content providers seeking QoE monitoring capabilities without capital-intensive on-premises platform investment, accelerating global cloud QoE deployment.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to the concentration of leading QoE analytics platform vendors, including Cisco Systems Inc, IBM Corporation, and NetScout Systems Inc., combined with high telecom operator technology investment levels driven by competitive 5G network differentiation pressure. United States major carriers AT&T, Verizon, and T-Mobile are investing heavily in subscriber experience management platforms to reduce churn in saturated mobile markets. Large OTT content platform operators headquartered in North America are deploying enterprise-grade QoE analytics across their global content delivery networks to protect subscription retention rates.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, due to massive 5G subscriber base expansion across China, India, South Korea, and Japan, creating high-volume QoE monitoring requirements as operators compete for enterprise and consumer subscribers in markets with rapidly growing digital service consumption. Indian telecom operator consolidation around Reliance Jio and Airtel is driving large-scale network quality analytics investment to support aggressive 5G rollout differentiation. Southeast Asian operators across Indonesia, Thailand, Malaysia, and Vietnam are adopting cloud-based QoE platforms to support rapid network modernization programs with limited legacy infrastructure integration constraints.

Key players in the market

Some of the key players in QoE Analytics Market include Cisco Systems Inc, IBM

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Corporation, Hewlett Packard Enterprise, Ericsson, Nokia Corporation, Huawei Technologies Co Ltd, Amdocs Limited, NetScout Systems Inc, TEOCO Corporation, Accedian Networks Inc, RADCOM Ltd, EXFO Inc, Keysight Technologies Inc, ViaSat Inc, Sandvine Corporation, Broadcom Inc, and Juniper Networks Inc.

Key Developments:

In April 2026, Amdocs Limited announced a strategic partnership with a major Asia Pacific telecom operator to implement its amAIz AI analytics suite for real-time customer experience management across multi-cloud 5G deployments.

In March 2026, NetScout Systems Inc expanded its Adaptive Service Intelligence platform with new machine learning models for predictive QoE degradation detection in virtualized RAN and open RAN environments.

In February 2026, RADCOM Ltd secured a contract with a Tier-1 European operator to deploy its cloud-native 5G assurance platform, providing per-subscriber QoE monitoring across standalone 5G core networks.

Components Covered:

- Software
- Services

Deployment Modes Covered:

- Cloud
- On-Premises
- Hybrid

Applications Covered:

- Network Monitoring

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- Customer Experience Management
- Content Optimization
- Traffic Management
- Service Assurance
- Predictive Analytics

End Users Covered:

- Telecom Operators
- Content Providers
- Enterprises
- OTT Platforms
- Media & Entertainment

Regions Covered:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - United Kingdom
  - Germany

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- France
- Italy
- Spain
- Netherlands
- Belgium
- Sweden
- Switzerland
- Poland
- Rest of Europe

Asia Pacific

- China
- Japan
- India
- South Korea
- Australia
- Indonesia
- Thailand
- Malaysia
- Singapore

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- Vietnam
- Rest of Asia Pacific

South America

- Brazil
- Argentina
- Colombia
- Chile
- Peru
- Rest of South America

Rest of the World (RoW)

- Middle East
  - Saudi Arabia
  - United Arab Emirates
  - Qatar
  - Israel
  - Rest of Middle East
- Africa
  - South Africa
  - Egypt
  - Morocco

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Rest of Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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