

# DIGITAL MARKET OUTLOOK

## Service

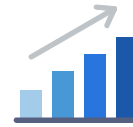
### What is the Digital Market Outlook?

Statista's Digital Market Outlook provides **forecasts, detailed market insights and key indicators for the** most relevant topics of the **digital economy**. This includes a broad range of products and services based on a digital distribution model.

All data is derived from **reliable bottom-up market modeling**, which makes it possible to take **comprehensive statistical data** from the Statista platform as well as **market-related and regional trends** and developments into account.

### Our Claim

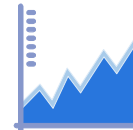
The Digital Market Outlook is a solution which gives you **instant access** to **reliable, comparable and easy-to-use information** about the most recent developments of digitalization on an international scale.



*Predicted revenue development*



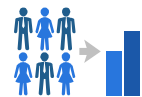
*Distinct market segmentation & scope*



*Realistic growth rates*



*Predicted user development*



*Segment-specific penetration rates*



*Demographic profiles*

# DIGITAL MARKET OUTLOOK

*Your questions, our solution – convenient, fast and comprehensive*

«What's the size of the [...] market?»

«Which country has the highest number of [...] users?»

«What's the projected development of the [...] market?»

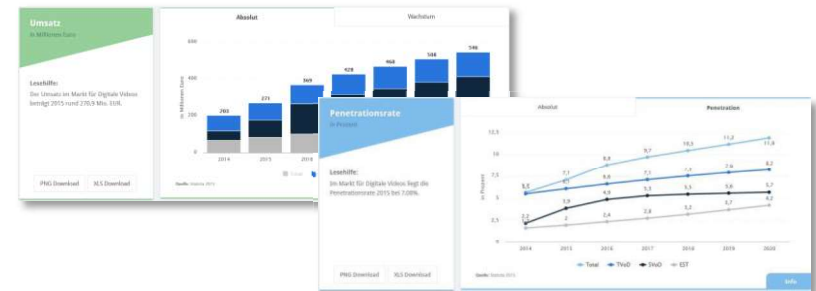
«Which are the top 5 fastest growing [...] markets?»

«How long [...] will remain double digit growth?»

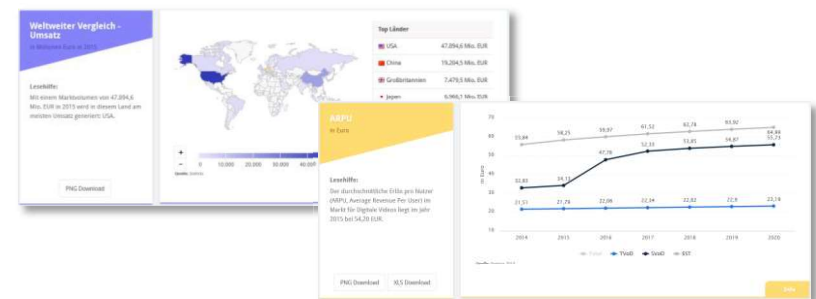
«What's the potential of [...] by 2020?»

«When will [...] reach mass market adoption?»

«What's the average customer value in [...]?»

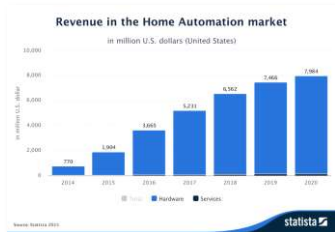


**statista**  
Digital Market Outlook



# DIGITAL MARKET OUTLOOK

Full access to the Digital Market Outlook webtool



**+30,000 interactive statistics**

- Direct downloads
- Fully integrated into the Statista database

**SMART HOME: ENERGY MANAGEMENT**

**32 Outlook Reports included**

- Qualitative and quantitative analysis
- Trends & top companies
- Deep Dive: Europe, USA, China

**Revenue Split - Desktop / Mobile**  
in million U.S. dollars

Reading Support  
In the "Digital Advertising" market, mUSD 62,129.9 of total revenue will be generated through mobile in 2020.

Year	Desktop	Mobile
2014	37,089	12,132
2015	36,362	25,213
2016	39,559	34,007
2017	40,418	42,345
2018	40,552	50,208
2019	40,247	56,605
2020	40,194	62,130

**Display Advertising Revenue by Industry**  
in percent in 2016

Reading Support  
In the "Digital Advertising" market, 21.00% of revenue is accounted for by the retail industry in 2016.

**Key Market Indicators**

The following key Market Indicators give an overview of the digitization level and the demographic and economic development of the selected region on the basis of general KPIs. The calculation of Statista's Digital Market Outlook is based on a complex market-driver logic including over 400 region-specific data sets.

	2014	2015	2016	2017	2018	2019	2020	CAGR (2014-2020)
Population	378.0m	371.4m	374.3m	377.0m	379.5m	381.7m	383.8m	+0.8%
Households	124.3m	125.4m	126.6m	127.8m	128.9m	130.1m	131.3m	+0.9%
GDP / Capita	USD 54,597	USD 56,421	USD 58,625	USD 61,013	USD 63,366	USD 65,506	USD 67,692	+3.6%
Internet Penetration	86.7%	88.5%	90.5%	92.2%	93.5%	94.3%	94.8%	+1.6%
Smartphone Penetration	52.0%	55.5%	59.3%	63.3%	67.5%	72.1%	76.9%	+6.7%

Source: Statista 2015



**MAIN PURCHASING MOTIVES IN ENERGY MANAGEMENT: COST CUTTING AND COMFORT**

Customer insights: 85%

Key Assumptions: 10%

Market sizing subjects for Energy Management forecast

**BEST PRACTICE: LOXONE**

Company profile Loxone GmbH from Austria

Footprint

Background

Key performance indicators

Installed base, Mioerver

Regional source of revenue in 2015

**ENERGY MANAGEMENT: PRODUCTS & SERVICES**

Market Scope - Smart Home Energy Management

Global Smart Home revenue

**ENERGY MANAGEMENT IN MAJOR REGIONS**

Market KPI comparison by region

Revenue

Paying households



# DIGITAL MARKET OUTLOOK

## Topics – Nine digital verticals with 36 segments



### **Digital Media**

Video-on-Demand, Digital Music, Video Games, ePublishing



### **FinTech**

Digital Payments, Business Finance, Personal Finance



### **eTravel**

Online Travel Booking, Mobility Services



### **eServices**

Event Tickets, Fitness, Dating Services, Food Delivery



### **eHealth**

Diabetes, Hypertension, Heart Failure



### **Connected Car**

Content & Services, Safety & Driving Assistance, Navigation Services, Diagnostics & Maintenance, Connectivity



### **Smart Home**

Home Automation, Security, Home Entertainment, Ambient Assisted Living, Energy Management



### **e-Commerce**

Fashion, Electronics & Media, Food & Personal Care, Furniture & Appliances, Toys, Hobby & DIY



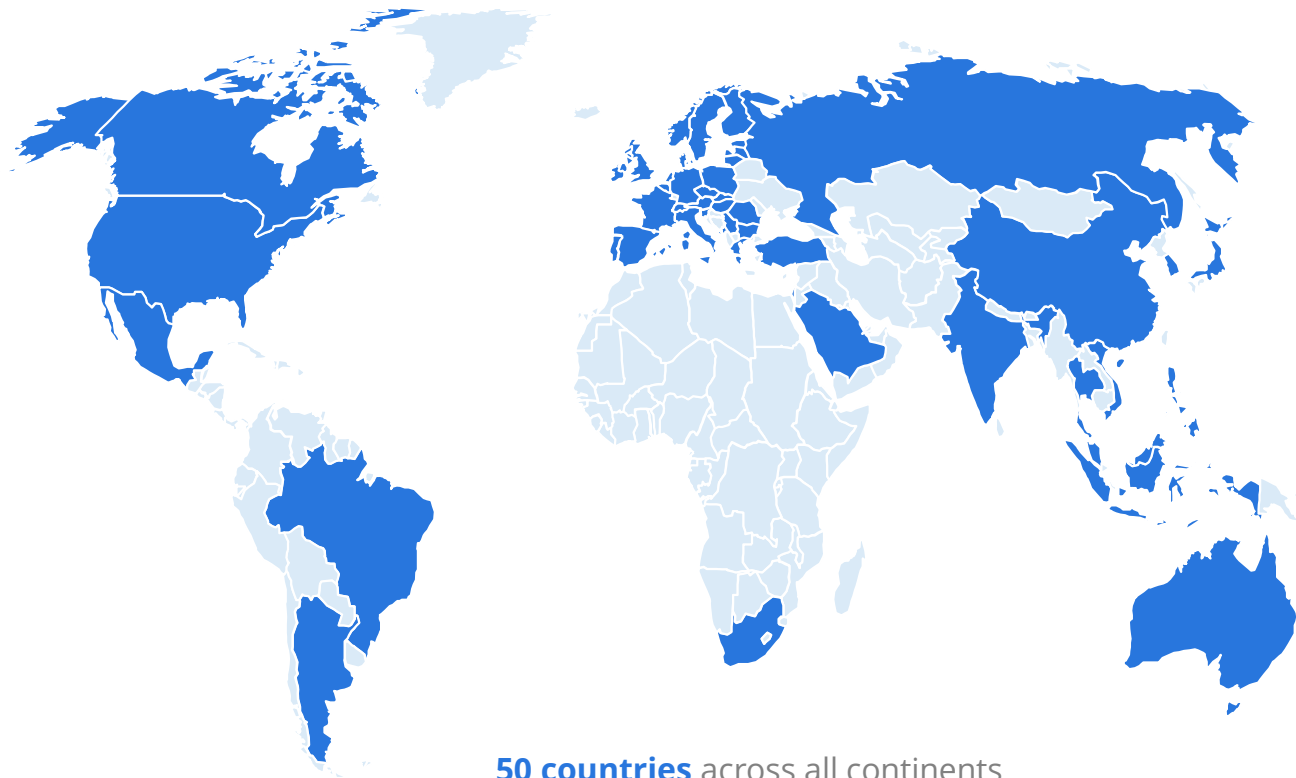
### **Digital Advertising**

Banner Ads, Video Ads, Search Ads, Social Media Ads, Classifieds

Revenue forecasts and user development, ad-hoc market research, segment-specific trend-reports as well as an additional breakdown into 92 different categories

# DIGITAL MARKET OUTLOOK

Coverage – 50+ international countries & regions



**50 countries** across all continents  
~ **90 %** of worldwide **economic power**<sup>1</sup>  
~ **78 %** of global **internet population**

<sup>1</sup> based on the global gross domestic product

## Asia:

- China
- Hong Kong
- India
- Indonesia
- Japan
- Malaysia
- Philippines
- Singapore
- South Korea
- Thailand
- Vietnam

## Africa & Middle East:

- Israel
- Saudi Arabia
- South Africa
- Turkey

## Australia:

- Australia

## North America:

- Canada
- United States

## Latin America:

- Argentina
- Brazil
- Mexico

## Europe:

- Belgium
- Bulgaria
- Denmark
- Germany
- Estonia
- Finland
- France
- United Kingdom
- Ireland
- Italy
- Croatia
- Latvia
- Lithuania
- Netherlands
- Norway
- Austria
- Poland
- Portugal
- Romania
- Russia
- Sweden
- Switzerland
- Serbia
- Slovakia
- Slovenia
- Spain
- Czech Republic
- Hungary

# DIGITAL MARKET OUTLOOK

*Statista – Your single source supplier for digital market data*

## *What makes us unique*

Statista combines the **powerful insights of market research and trend scouting** and puts results in the context of regional and structural characteristics of different markets. The resulting outcome is an **independent and unique forecast of market development** in various areas of digitalization.

The foundation for the Digital Market Outlook is the **vast number of sources and research knowledge** which is part of our renowned statistics platform. By using complex techniques of data modeling and statistical forecasting, we are able to derive reliable predictions for dynamic evolving markets which have a high level of uncertainty.

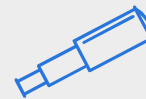
Digital market data is often available in many different forms, scopes and segmentations, which makes it almost impossible to get reliable comparisons between two or more data sets. **Consistent data on an international scale with unified definitions** of what exactly is in-scope and what is out-of-scope is the **key for realistic and successful business analysis and planning**.

Therefore Statista's Digital Market Outlook provides **unique value** in the area of digital market data. Our goal is to bring as much information as possible together, **normalize data sets**, separate the relevant parts and derive a consistent view on the market dynamics and rising trends of the global digital economy.



## *Current state analysis*

- › How is economic value currently generated in the market?
- › How many current users/customers are there ?
- › How does an appropriate segmentation of users look like?
- › Which players are market and innovation leaders?
- › How does the price of various products and services evolve?



## *Trend scouting*

- › How will economic value be generated in the future?
- › Are there analogies to the old economy or similar markets?
- › Which kinds of products or business model innovations stand out as the most successful?
- › Which areas of business will see rising venture capital investments?
- › How is technological progress expected to develop in terms of performance, availability and pricing?
- › When and where is market growth expected to reach it's limit?