



UTILITIES

- NAICS 22 -

U.S. Industry Report 2016 - Sample

Fashion & Textiles
 Telecommunications Health Care
 Utilities Manufacturing
 Drugstores
 Banking & Finance Restaurants & Nightlife
 Automotive Industry
 Insurance Construction Real Estate Retail
 Car Dealers
 Food & Beverages Education
 Transportation

41 INDUSTRIES



OVERVIEW & INSIGHTS

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 Consumer & business insights
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 Key figures at a glance Trends Surveys
 Management summary
 Quotes on industry development

REGULAR UPDATES & DIFFERENT COUNTRIES



More countries, e.g. Germany
 Most recent available data
 Screening of all relevant sources
 Ongoing expansion of coverage

CLEAR STRUCTURE & METHODOLOGY



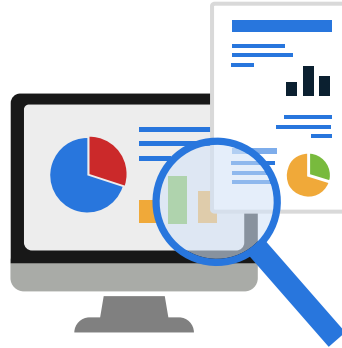
Standardized agenda
 Index of figures List of sources
 Description of forecast methods
 Detailed definitions

INNOVATION & RESEARCH



R&D intensity & spend
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U.S. INDUSTRY REPORTS



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 Segment comparison Development



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 Segment comparison



EMPLOYEES & SALARIES

Unemployment rates
 Gender split Annual mean wage
 Number of employees
 Average weekly hours
 Number of degrees

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- › More than **1 million statistics on 80,000 topics from 18,000 sources**
- › **All 41 industry reports**
(worth \$425.00 per industry report if purchased individually)
- › **Approx. 3,000 Statista dossiers**
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- › **Studies database with approx. 20,000 third party studies and source database**

Exclusive Statista corporate account content

- › **Digital Market Outlook**
Revenue data and forecasts on **9 digital markets in 50 countries** with **94 sub-segments**
- › **Consumer Market Outlook**
Main KPIs and forecasts on **10 consumer markets in 28 European countries** with **70 product categories**

Your contact



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AGENDA

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- › Industry definition
- › Management summary
- › Selected key figures
- › SWOT analysis
- › CEO quotes
- › Trends

Financial Numbers

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DEFINITION OF THE “UTILITIES” INDUSTRY

Based on the North American Industry Classification System (NAICS)

Utilities– NAICS 22



- ▶ Sector 22 comprises establishments engaged in the provision of the following utility services: electric power, natural gas, steam supply, water supply, and sewage removal.
- ▶ Within this sector, the specific activities associated with the utility services provided vary by utility: electric power includes generation, transmission, and distribution; natural gas includes distribution; steam supply includes provision and/or distribution; water supply includes treatment and distribution; and sewage removal includes collection, treatment, and disposal of waste through sewer systems and sewage treatment facilities.
- ▶ Excluded from this sector are establishments primarily engaged in waste management services classified in Subsector 562, Waste Management and Remediation Services. These establishments also collect, treat, and dispose waste materials; however, they do not use sewer systems or sewage treatment facilities.

Subcategories included in this report

<i>NAICS</i>	<i>Subcategory</i>
2211	Electric Power Generation, Transmission, and Distribution
22111	Electric Power Generation
22112	Electric Power Transmission, Control, and Distribution
2212	Natural Gas Distribution
2213	Water, Sewage, and Other Systems
22131	Water Supply and Irrigation Systems
22132	Sewage Treatment Facilities
22133	Steam and Air-Conditioning Supply

MANAGEMENT SUMMARY

Utilities

- › Traditional utility companies in the U.S. are large and established companies, as electric power generation and transmission requires significant capital expenditures to maintain the infrastructure. Apart from that, the industry is sensitive to changes in the economy and volatile oil- and natural gas prices.
- › Electricity generation from renewable sources is the most significant trend, attracting more investors as renewables are finally becoming profitable. 97% of all new electric generation capacity deployed in 2015 was from various renewable sources, especially wind and solar.
- › The utilities industry revenue amounted to of US\$567 billion in 2015, a visible decrease of 6.3% from 2014.
- › We forecast the annual compound growth rate from 2015 to 2020 to be at 1.2%.
- › Electric power generation, transmission and distribution is the biggest subcategory in utilities, accounting for 80.8% of the industries total revenue.
- › The industry was comprised of almost 6 thousand firms in 2014, their number has slightly increased by 0.1% compared to 2013.
- › Employment numbers in the industry have increased by 1.3% from 2014 to 2015 resulting in 558.7 thousand employees earning an average salary of US\$73.1 thousand.



Ksenia Striapunina

Analyst



Volker Staffa

Analyst

Ksenia Striapunina studied Finance in Hamburg and Engineering Management in Russia. Volker Staffa studied Business with focus on Logistics and Supply Chain Management in Hamburg and Rhode Island.

Combined they have 7,5 years of experience as analysts.

Volker has been writing Industry Reports for Statista since 2012, while Ksenia joined Statista this year after several years in consulting.

We wish you a valuable and insightful reading experience.

KEY FIGURES AT A GLANCE

Utilities in 2015



Revenue

US\$567 bn

Total revenue

- 6.3%

Growth
2014 - 2015

1.2%

CAGR¹ forecast
2015 - 2020



Companies

5,917²

Number of firms²



Selected key players in the industry



People

558.7 k

People employed

US\$73.1 k

Annual mean wage

SWOT ANALYSIS

Strengths

Product

- High quality
- Low cost
- Wide range of products
- Strong brand
- Good customer service

Marketing

- Strong advertising
- Good distribution
- Effective sales
- Good customer service
- Strong brand

Operations

- High quality
- Low cost
- Wide range of products
- Strong brand
- Good customer service

People

- High quality
- Low cost
- Wide range of products
- Strong brand
- Good customer service

UTILITIES SECTOR INVESTING BILLIONS IN RENEWABLE ENERGY SOURCES

Chief executive quotes on the latest industry development

“Investment in renewable energy is a key part of our strategy to meet our net-zero target by 2050.”

“We are committed to the development of renewable energy, including solar, wind, hydro, and geothermal, and will continue to invest in these areas to meet our net-zero target by 2050.”

Renewable energy investments in 2023 in billion USD



The chart shows a significant increase in investment in renewable energy in 2023, reaching 100 billion USD, up from 60 billion USD in 2022.

The increase in investment is driven by a number of factors, including government support, falling costs of renewable energy technologies, and growing demand for clean energy.



BIG PLAYERS GETTING IN ON THE RENEWABLE ENERGY BUSINESS

Response to increasing fuel depletion and 'green' consumer demand

- **Investment in renewable energy**
 - 1. Global investment in renewable energy reached \$100 billion in 2009, up from \$70 billion in 2008.
 - 2. Wind and solar are the fastest growing sectors.
- **Government incentives**
 - 1. Tax credits and grants encourage investment.
 - 2. Feed-in tariffs guarantee prices for renewable energy.
- **Corporate responsibility**
 - 1. Companies are increasingly committed to reducing carbon footprints.
 - 2. Renewable energy is seen as a way to reduce emissions.
- **Technological advances**
 - 1. Improvements in efficiency and cost reduction.
 - 2. Breakthroughs in storage and grid integration.
- **Global energy demand**
 - 1. Growing economies in Asia and Africa drive demand.
 - 2. Fossil fuel reserves are being depleted.
- **Environmental concerns**
 - 1. Climate change and air pollution are major issues.
 - 2. Public pressure for cleaner energy sources.
- **Energy security**
 - 1. Dependence on oil and gas from unstable regions.
 - 2. Diversification into renewable energy for stability.
- **Energy efficiency**
 - 1. Focus on reducing energy waste in buildings and industry.
 - 2. Smart grids and energy-saving technologies.



Renewable energy
generation is up
10% in 2009 compared
with 2008

Renewable Energy Investment

- **Global Investment**
 - 1. Total investment in renewable energy reached \$100 billion in 2009.
 - 2. Wind and solar are the fastest growing sectors.
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STEADY GROWTH OF ELECTRIC POWER GENERATION FROM RENEWABLE SOURCES

Electric power generation from renewable sources is growing steadily

Renewable sources provided 10% of U.S. electric power generation in 2013



In 2013, renewable sources provided 10% of U.S. electric power generation

- 1. Renewable sources provided 10% of U.S. electric power generation in 2013, up from 8% in 2010.
- 2. Wind power was the largest source of renewable electricity, providing 4.5% of total U.S. electricity.
- 3. Hydropower provided 3.1% of U.S. electricity, followed by solar (1.2%) and geothermal (0.5%).
- 4. Renewable sources provided 10% of U.S. electricity in 2013, up from 8% in 2010.
- 5. Renewable sources provided 10% of U.S. electricity in 2013, up from 8% in 2010.
- 6. Renewable sources provided 10% of U.S. electricity in 2013, up from 8% in 2010.
- 7. Renewable sources provided 10% of U.S. electricity in 2013, up from 8% in 2010.
- 8. Renewable sources provided 10% of U.S. electricity in 2013, up from 8% in 2010.

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- › Revenue development
- › Revenue by subcategory
- › Most over- and under-performing subcategories
- › GDP and contribution by industry
- › Growth rate of GDP and growth rate of value added by sector
- › States experiencing the industry's highest value added numbers
- › Expenditures for ICT equipment and computer software

Companies

Employees & Salaries

Appendix

AFTER YEARS OF GROWTH, REVENUES WERE AT US\$690 BILLION IN 2015

Sales¹ over time in billion USD



1. 2015 sales were 690 billion USD, up from 600 billion USD in 2014, an increase of 15%. Compared to the corresponding period of 2014, sales were 10% higher.
2. The 2015 sales of 690 billion USD were an average of 10% higher than the average of 630 billion USD in 2014.

GROCERY STORES ACCOUNT FOR ALMOST 90% OF THE INDUSTRY REVENUES

Sales by subcategory in 2013 in billion USD



BEER, WINE AND LIQUOR STORES AS WELL AS SPECIALTY FOOD STORES WITH HIGH GROWTH

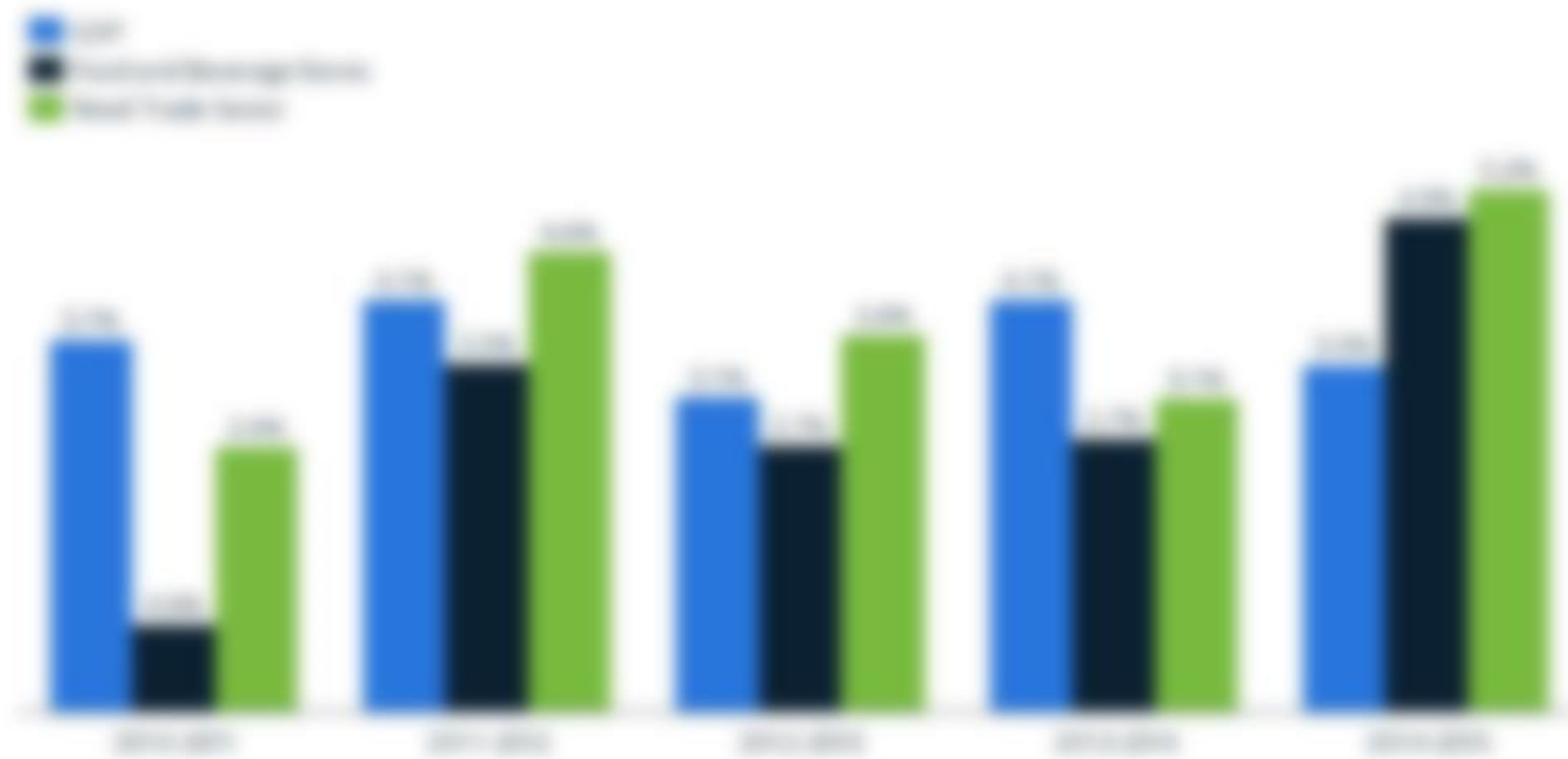
Performance of subcategories

Subcategory



GROWTH OF FOOD & BEVERAGES RETAIL VALUE ADDED WITH 5% ABOVE GDP GROWTH

Growth rate of GDP and growth rate of value added by industry



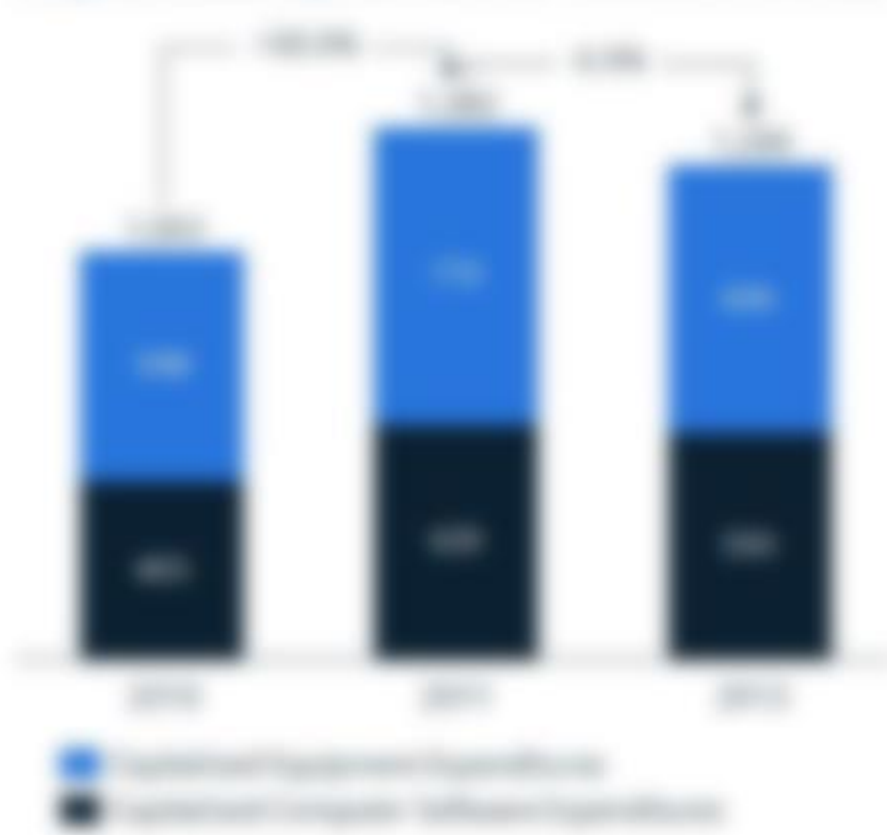
CALIFORNIA AND TEXAS HAVE THE BIGGEST SHARE OF INDUSTRY VALUE ADDED IN 2014

Top 10 states reporting value added* in 2014 in billion USD



EXPENDITURES DECREASED BY ALMOST 7% IN 2013 AFTER INCREASING BY 30% IN 2011

Capital expenditures in 2011 in million USD



Capital expenditures in 2012 in million USD



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- › Selected key players in the industry
- › Number of firms and establishments
- › Number of firms and establishments by subcategory
- › Number of establishments with paid employees per state
- › Establishment births
- › Establishment deaths

Employees & Salaries

Appendix

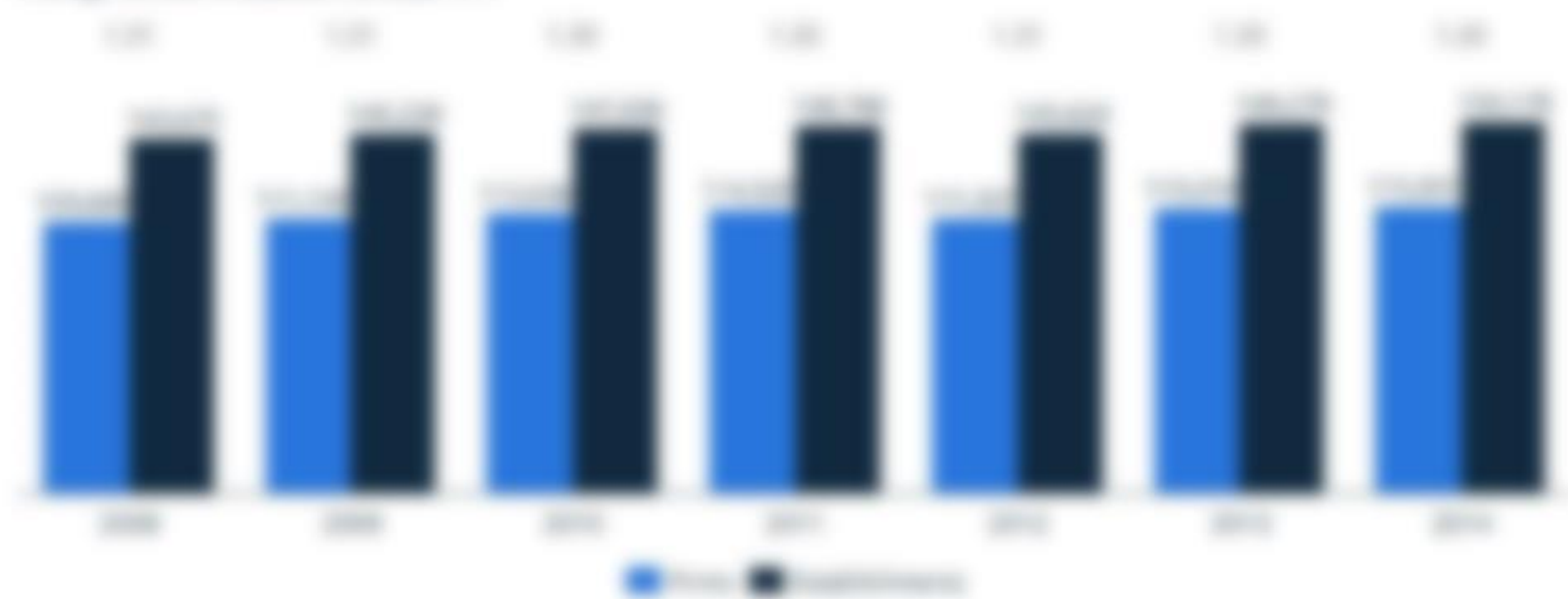
SELECTED KEY PLAYERS IN THE INDUSTRY

	Market	High	High Low
Market	100	100	100
Market 1	100	100	100
Market 2	100	100	100
Market 3	100	100	100
Market 4	100	100	100
Market 5	100	100	100
Market 6	100	100	100
Market 7	100	100	100
Market 8	100	100	100
Market 9	100	100	100
Market 10	100	100	100

THE TOTAL NUMBER OF ESTABLISHMENTS AND FIRMS INCREASED TWO YEARS IN A ROW

Total number of firms & establishments with paid employees over time

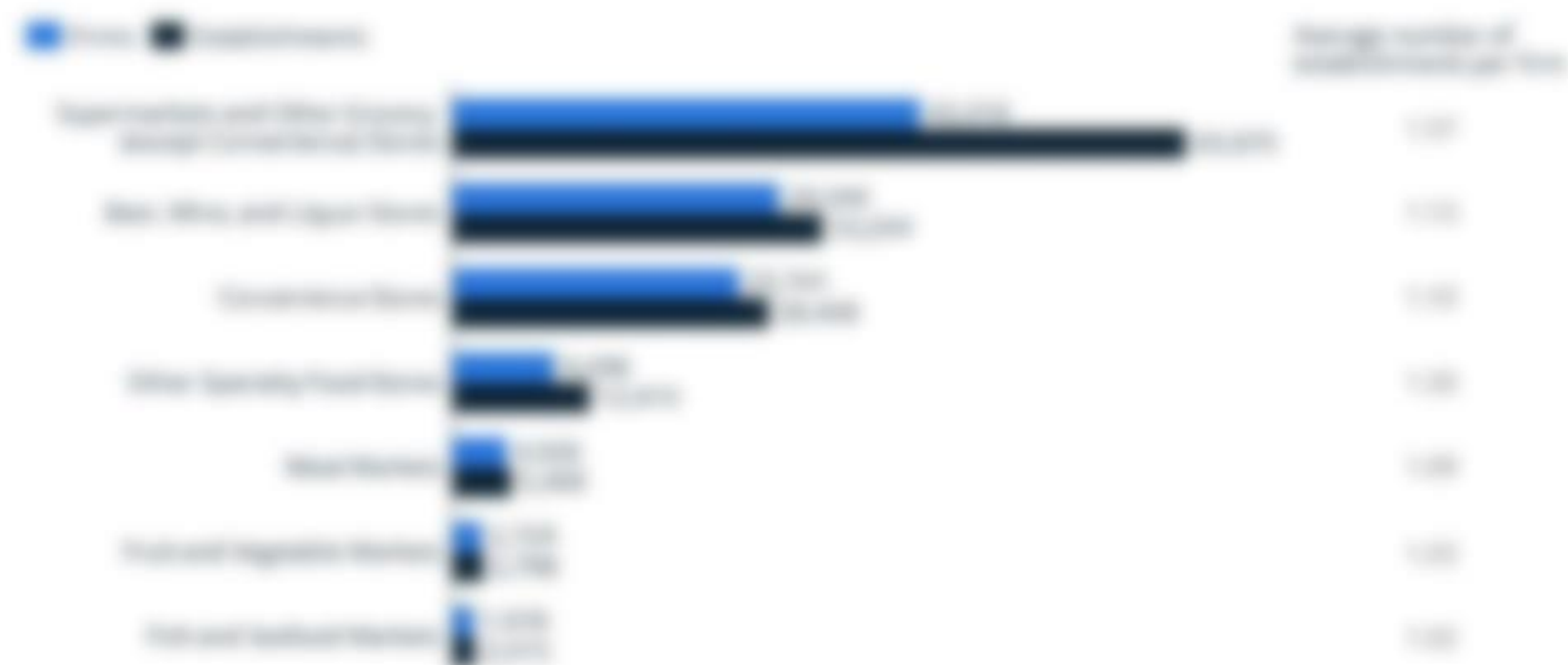
Source: Bureau of Economic Analysis



Notes: The number of firms and establishments with paid employees is based on the Survey of Business Operations (SBO) data. The SBO data is based on the Survey of Business Operations (SBO) data. The SBO data is based on the Survey of Business Operations (SBO) data. The SBO data is based on the Survey of Business Operations (SBO) data.

SUPERMARKETS AND OTHER GROCERY STORES WITH MOST FIRMS AND ESTABLISHMENTS

Total number of firms & establishments by subcategory 2014



Notes: The total number of firms and establishments is based on the number of establishments identified in the data. The total number of establishments is based on the total number of establishments in the database.

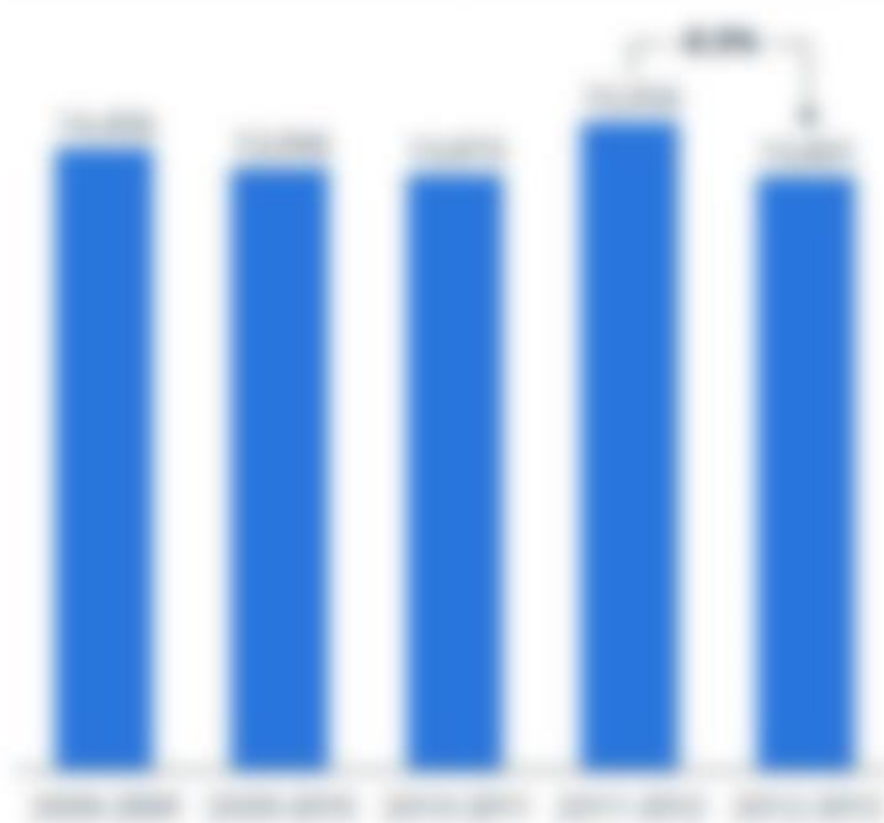
ESTABLISHMENTS CAN BE FOUND COUNTRYWIDE WITH FOCUS ON THE EAST

Number of establishments¹ with paid employees per state in 2014



NUMBER OF ESTABLISHMENT BIRTHS DROPPED BY 8% COMPARED TO PREVIOUS PERIOD

Number of establishment births



Share of establishment births by employment size in 2017:Q4



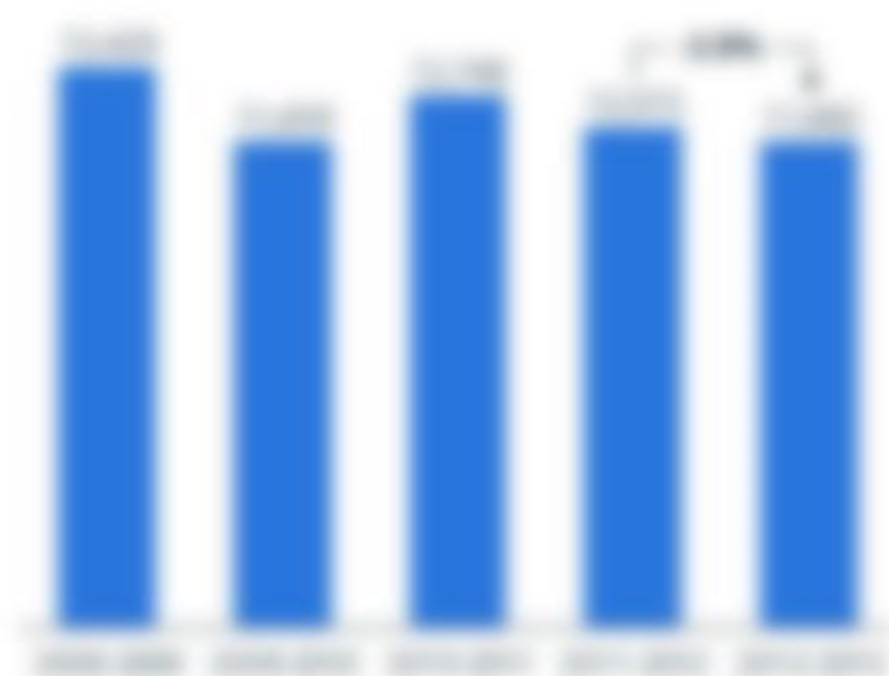
Key finding: The number of establishment births is declining across all employment sizes, with a significant drop in small establishments. The number of medium establishments is also declining, while the number of large establishments is increasing.



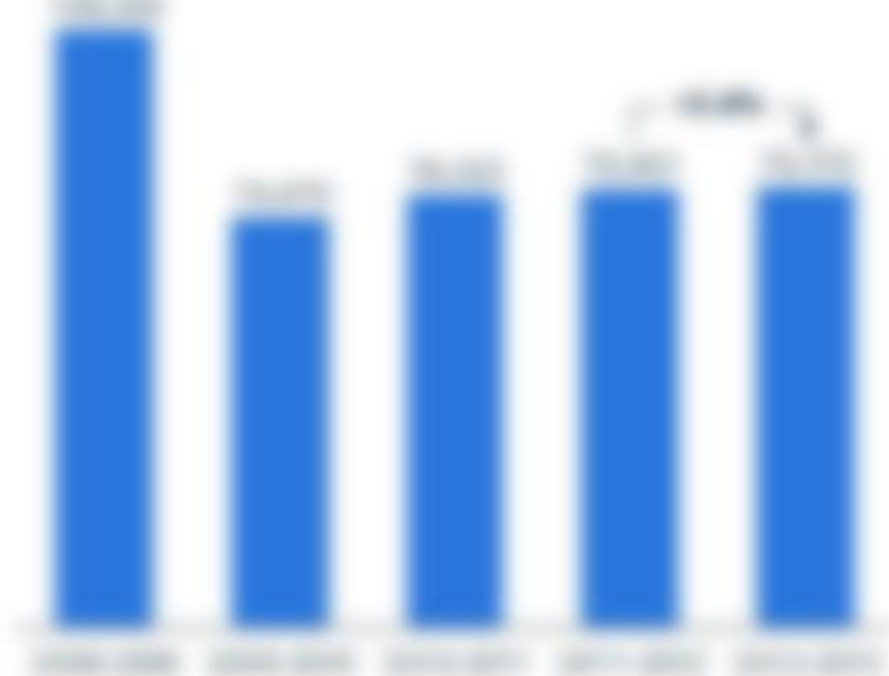
Establishment births are defined as the number of new establishments created in a given period.

NUMBER OF ESTABLISHMENT DEATHS DECREASED IN THE PAST TWO PERIODS

Number of establishment deaths



Employment losses due to establishment death



Establishment deaths: 2015-2016: 340,000; 2016-2017: 300,000; 2017-2018: 320,000; 2018-2019: 310,000; 2019-2020: 290,000.

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- › Total number of employees and employee gender percentage
- › Share of employees by sectors
- › Full-time equivalent employees and wage and salary accruals
- › Unemployment rates
- › Annual mean wages
- › Occupations with the highest industry employment
- › Average weekly hours
- › Bachelor's, master's, and doctoral degrees

Appendix

THE TOTAL NUMBER OF EMPLOYEES CONTINUES TO INCREASE IN 2016

Total number of employees¹⁾ per year²⁾ in thousands



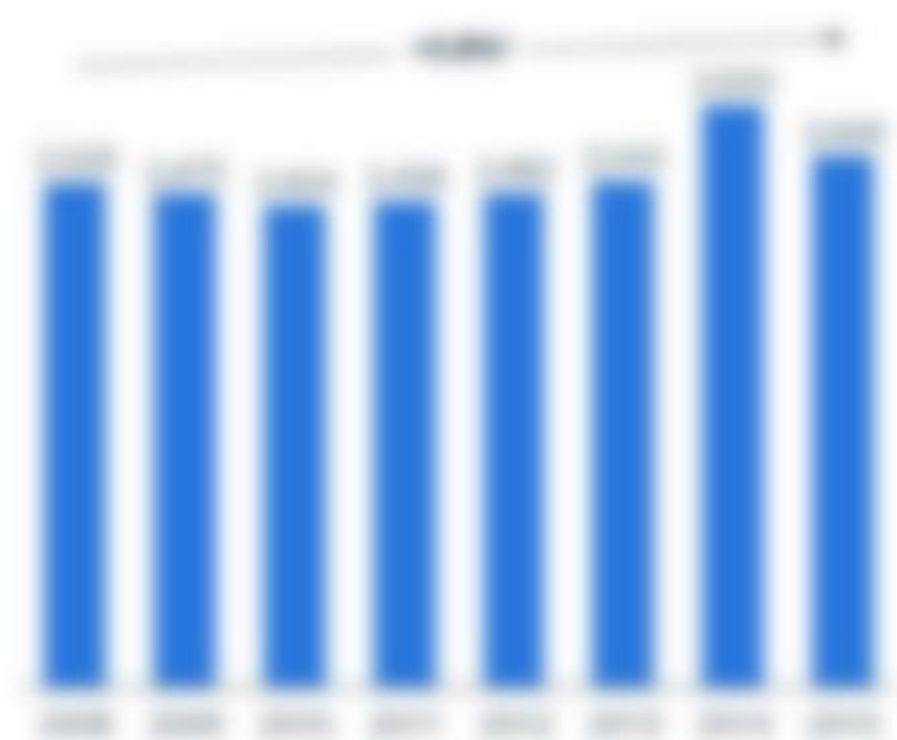
WITH 11%, THE RETAIL TRADE SECTOR HAS THE 3RD HIGHEST SHARE OF EMPLOYEES

Share of employees¹⁾ by sector in 2019



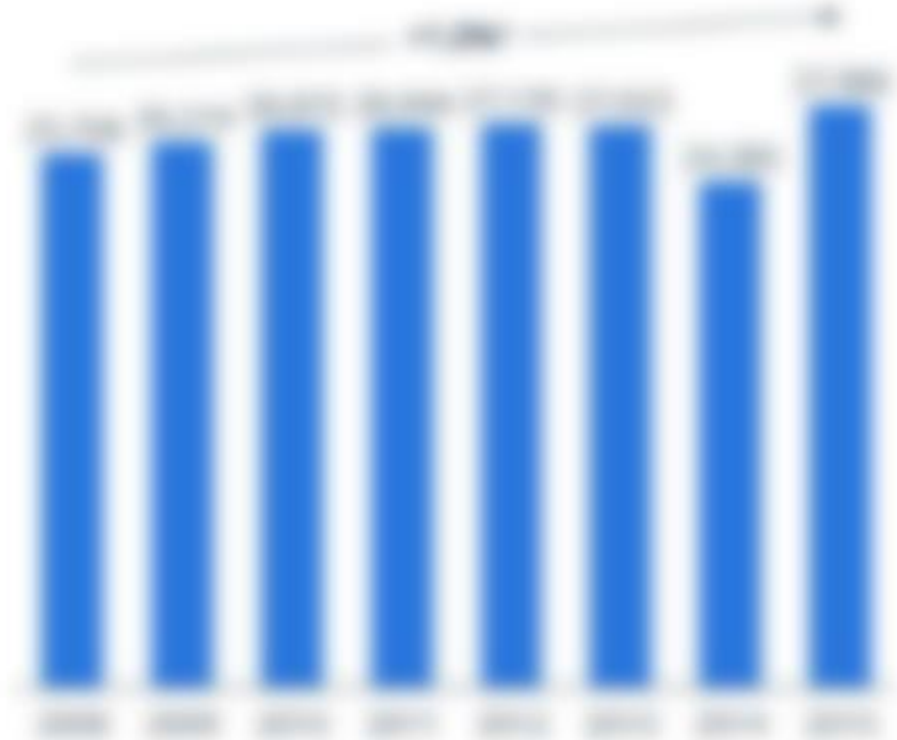
THE NUMBER OF FTE EMPLOYEES DROPPED IN 2015, BUT SALARY ACCRUALS INCREASED

Full-time equivalent employees' year-end
in thousands



From 2008 to 2015, the number of full-time equivalent employees increased by an average of 1.5%.

High and salary accruals per full-time
equivalent employee' in USD



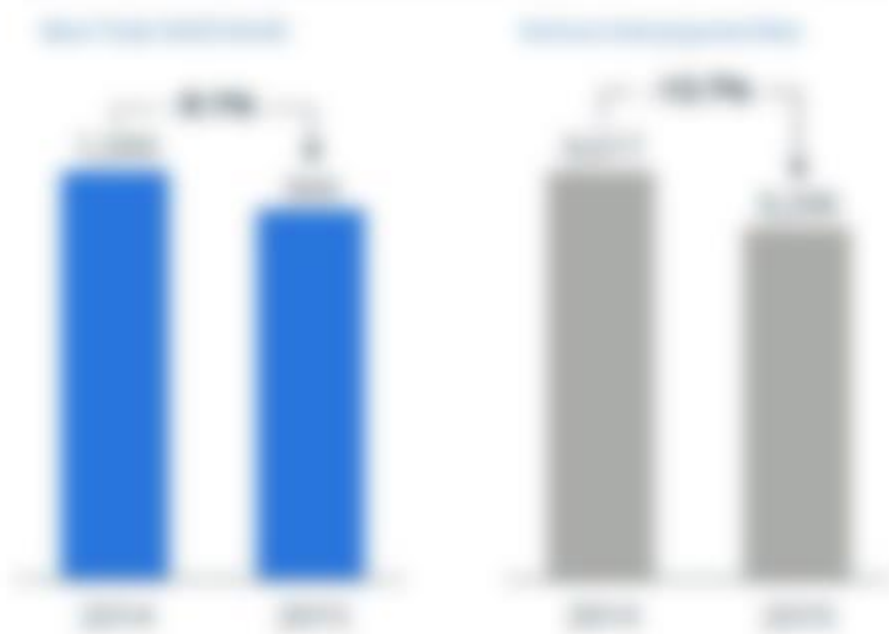
From 2008 to 2015, high and salary accruals per full-time equivalent employee' increased by an average of 1.5%.

6% INDUSTRY UNEMPLOYMENT RATE SLIGHTLY ABOVE NATIONAL RATES

Development in the number of unemployed¹⁾ in percentage

	2011	2012	2013
Total	136	136	136
IC ²⁾	136	136	136
IC ³⁾	136	136	136
Manufacturing			
IC	136	136	136
IC ³⁾	136	136	136
IC ⁴⁾	136	136	136

Development in the number of unemployed¹⁾ in thousands



Compared to the national unemployment rate, the unemployment rate in manufacturing is 6% above the national rate. The unemployment rate in manufacturing is 6% above the national rate. The unemployment rate in manufacturing is 6% above the national rate.

ANNUAL MEAN WAGE SLOWLY GROWING AND NOW AT US\$27 THOUSAND

Annual mean wage¹ per worker² in thousand US\$



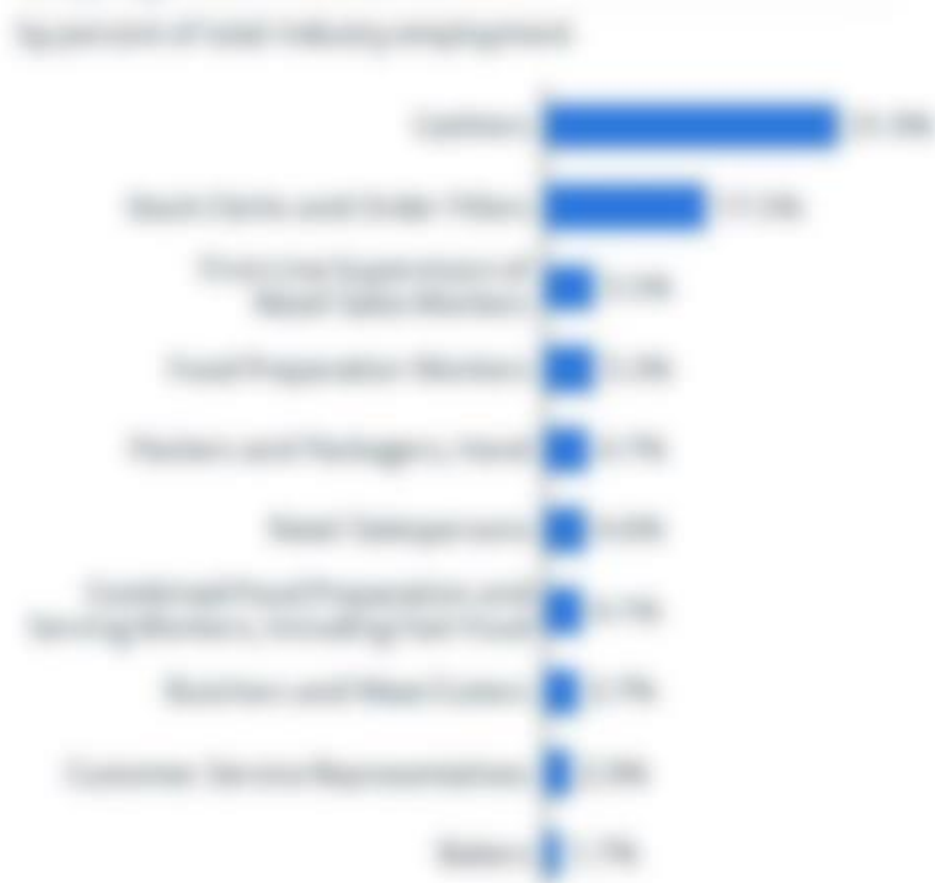
Annual mean wage¹ in 2019 by subcategory² in thousand US\$



Note: 1) The annual mean wage is the average of the wages paid to all workers in the economy. 2) The annual mean wage is the average of the wages paid to all workers in the economy. The annual mean wage is the average of the wages paid to all workers in the economy. The annual mean wage is the average of the wages paid to all workers in the economy.

CASHIERS ACCOUNT FOR >30% OF INDUSTRY EMPLOYMENT AND EARN LESS THAN AVERAGE

Occupations with the highest industry employment in 2012



Annual mean wage in 2012



Difference to industry mean wage in 2012



AVERAGE WEEKLY HOURS BELOW PRIVATE INDUSTRY AND RETAIL TRADE HOURS

Average weekly hours of all payroll employees¹



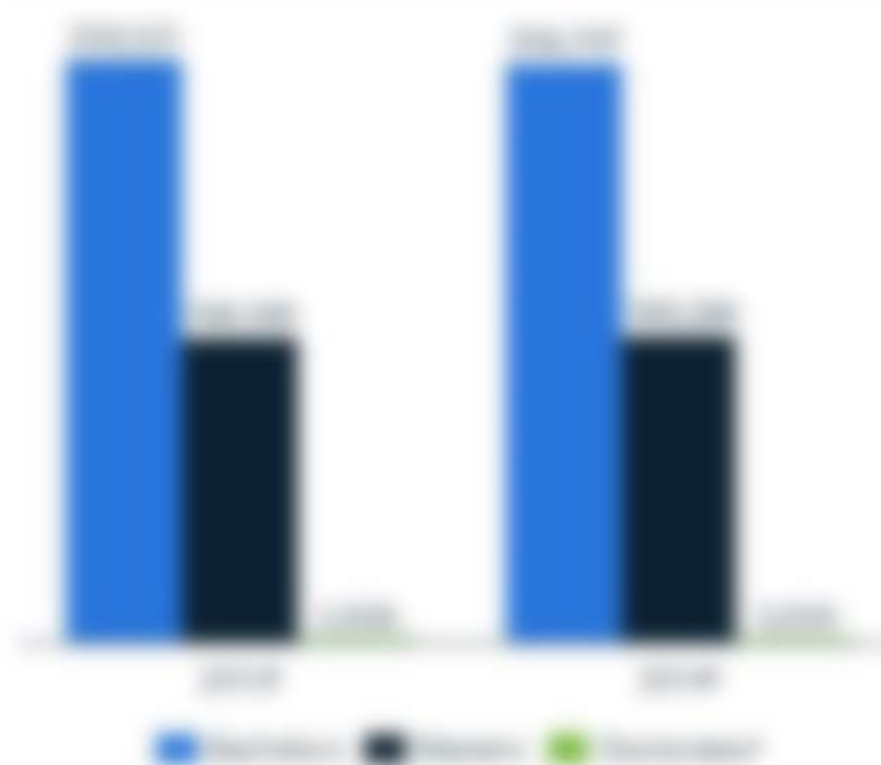
- Total Private Industry
- Total Retail Trade
- Total Non-Retail Trade

¹Excludes self-employed, unpaid family workers, and unpaid volunteers. Hours are reported by employers for all employees, including those who are not working in the current period. Hours are reported for all employees, including those who are not working in the current period.

²Hours are reported for all employees, including those who are not working in the current period. Hours are reported for all employees, including those who are not working in the current period.

STABLE NUMBER OF DEGREES IN BUSINESS, MGMT., MARKETING AND SUPPORT SERVICES

Number of degrees in Business, Management, Marketing and Support Services*



*Should be used for the degree counts in the above table for the purpose of the following table.

Degrees in Business, Management, Marketing and Support Services* in 2019/20

	2019	2020	2021
Business	1,000	1,000	1,000
Management	500	500	500
Marketing and Support Services	100	100	100

*Should be used for the degree counts in the above table for the purpose of the following table.

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- › Classification and data used in this report
- › An annotation of the forecast methods
- › Index of figures
- › Overview on U.S. industry reports
- › Introduction to “Digital Market Outlook” and “Consumer Market Outlook”
- › Statista Service “Research & Analysis”
- › Authors, imprint, sources and disclaimer

CLASSIFICATION AND DATA USED IN THIS REPORT

Data Sources

The Statista industry reports package and present quantitative data from many private and public sources of information. These sources include the U.S. Census Bureau, U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics, National Center for Education Statistics, National Science Foundation, and U.S. Patent and Trademark Office. The data sources are indicated in footnotes throughout the report.

NAICS-Classification

The North American Industry Classification System (NAICS) was introduced by the statistical bureaus of Mexico, Canada, and the United States in 1997 to replace the Standard Industrial Classification (SIC) system. It is designed to align with the United Nations Statistical Office's International Standard Industrial Classification (ISIC) system. The initial two digits indicate the largest sector. The third digit indicates the subsector, while the fourth digit indicates the industry group. The classification system is modified every five years with the last three changes occurring in the years 2002, 2007, and 2012. Unless otherwise noted, the majority of the data in the Statista industry reports is based on the NAICS 2007 classification. Detailed information about the different classifications can be found on the homepage of the U.S. Census Bureau: <http://www.census.gov/cgi-bin/sssd/naics/naicsrch?chart=2007>.

Forecasts and estimates

Certain diagrams within this industry report include estimates or forecasted values for the years of 2016 to 2020. These estimated values and projections are indicated.

Data Indicator

NAICS Code
XXX Data

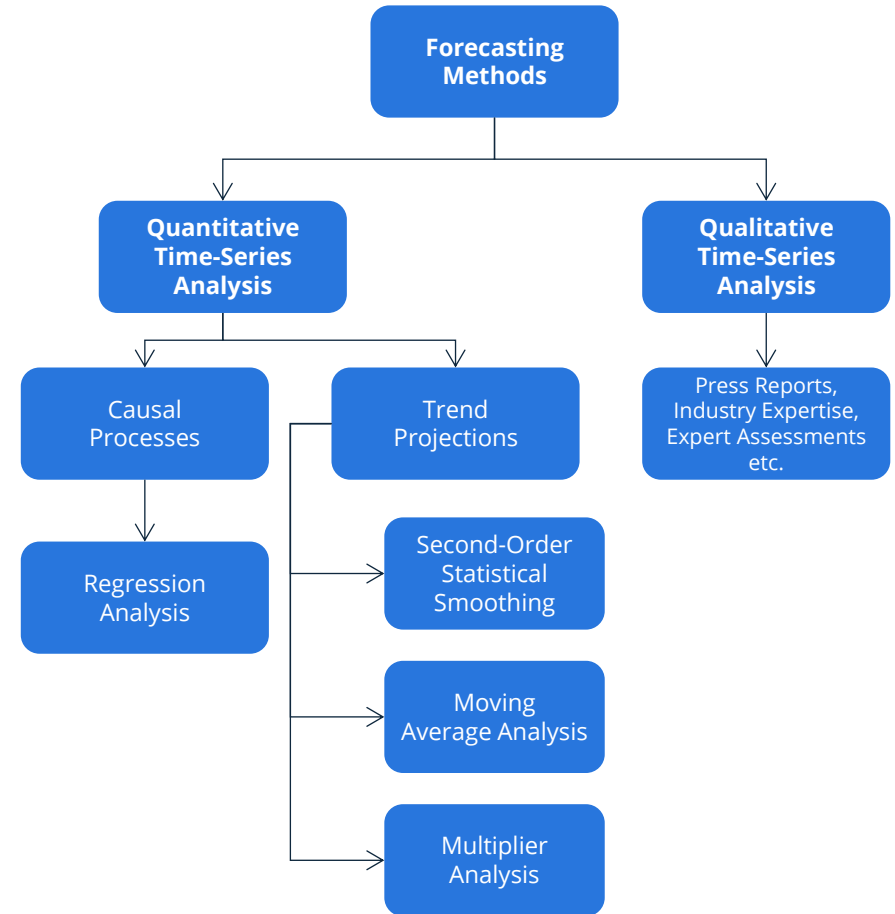
This box in the top right corner indicates that the slide data is either aggregated or from the sector that the report industry is included within.

AN ANNOTATION OF THE FORECAST METHODS

Depending upon the availability of data and the quality of the data's time range, the following methods were used to prepare forecasts: Trend Analysis (moving average analysis, second-order statistical smoothing and multiplier analysis), linear regressions, as well as subjective estimates. These estimates reflect years of industry expertise and vast knowledge.

Industry specific sales, revenue, and shipment calculations were made according to the relevant economic and business indicators, such as:

- › The general macro-economic developments within the U.S. economy (Gross Domestic Product)
- › U.S. foreign trade developments (import and export numbers)
- › The development of U.S. household disposable income numbers
- › The development of U.S. domestic household consumption differentiated according to expenditures (such as, expenses related to foods, drinks, and transportation, as well as accommodation and restaurant expenses)



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Annual mean wage by occupation in 2015

Difference to industry mean wage in 2015

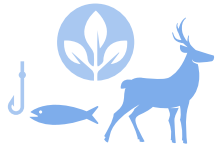
Weekly earnings by occupation and sex in 2015

Average weekly hours of all payroll employees over time

Number of bachelor's, master's, and doctoral degrees over time

Bachelor's, master's, and doctoral degrees in 2014 by sex

OVERVIEW OF ALL 41 U.S. INDUSTRY REPORTS ON STATISTA.COM (1/3)



Agriculture, Forestry,
Fishing & Hunting
(NAICS 11)



Manufacturing:
Fashion & Textiles
(NAICS 313-316)



Manufacturing:
Computers & Electronics
(NAICS 334)



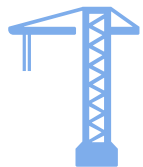
Utilities
(NAICS 22)



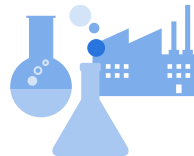
Manufacturing: Printing
(NAICS 323)



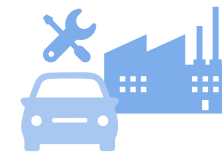
Manufacturing: Electrical
Equipment & Supplies
(NAICS 335)



Construction
(NAICS 23)



Manufacturing: Chemicals
(NAICS 325)



Manufacturing:
Automotive Industry
(NAICS 3361-3363)



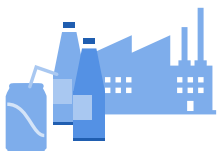
Manufacturing: Food
(NAICS 311)



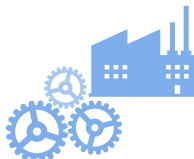
Manufacturing:
Plastics & Rubber
(NAICS 326)



Wholesale Trade
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Manufacturing: Beverages
(NAICS 3121)



Manufacturing: Machinery
(NAICS 333)



Retail: Car Dealers
(NAICS 441)

OVERVIEW OF ALL 41 U.S. INDUSTRY REPORTS ON STATISTA.COM (2/3)



Retail: Furniture
(NAICS 442)



Retail: Gasoline Stations
(NAICS 447)



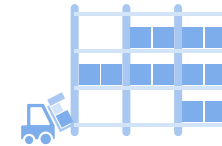
Transportation: Trucks
(NAICS 484)



Retail: Consumer Electronics
(NAICS 443)



Retail: Fashion
(NAICS 448)



Warehousing & Storage
(NAICS 493)



Retail: Building, Home & Garden
(NAICS 444)



Retail: Sports, Hobbies, Books & Music
(NAICS 451)



Publishing¹
(NAICS 511)



Retail: Food & Beverages
(NAICS 445)



Transportation: Air
(NAICS 481)



Motion Pictures, Music & Television
(NAICS 512, 515)



Retail: Drugstores
(NAICS 446)



Transportation: Water
(NAICS 483)



Telecommunications
(NAICS 517)

1: Except Internet

OVERVIEW OF ALL 41 U.S. INDUSTRY REPORTS ON STATISTA.COM (3/3)



Data Hosting & Computing
(NAICS 518)



Waste Management
& Recycling
(NAICS 61)



Restaurants & Nightlife
(NAICS 722)



Banking & Finance
(NAICS 521-523, 525)



Education
(NAICS 61)



Insurance
(NAICS 524)



Health Care
(NAICS 621-623)



Real Estate
(NAICS 531)



Amusement,
Gambling & Leisure
(NAICS 713)



Rental & Leasing
(NAICS 61)



Accommodation
(NAICS 721)

ABOUT CONSUMER MARKET OUTLOOK

10 consumer markets with 70 product segments



Alcoholic Beverages

Beer, spirits, wine



Non-alcoholic Drinks

Mineral water, soft drinks, juices



Hot Beverages

Coffee, tea, cocoa



Tobacco

Cigarettes, roll-your-own tobacco



Food

Dairy, meat, & fish products, processed fruit & vegetables, potato products, bread & bakery products, rice and pasta, sauces & seasonings, convenience, breakfast products, confectionery, snacks, baby food, pet food



Detergents and Cleaning Agents

Laundry detergents, household cleaners, dishwashing detergents, polishes, room scents and household insecticides



Cosmetics and Personal Care

Decorative cosmetics, skin care, personal hygiene, hair care, fragrances, oral care



Household and Tissue Paper

Toilet paper, tissue, household paper, feminine hygiene, diapers



Clothing

Women's apparel, men's apparel, sportswear and swimwear, underwear, hosiery

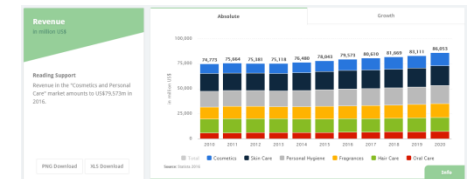


Shoes

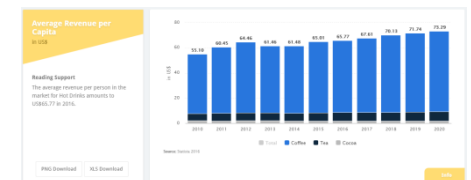
Leather shoes, athletic footwear, other footwear

Details

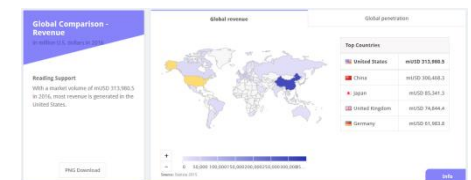
- › 27 countries
- › Direct access & downloads
- › 11-Year coverage: 2010– 2020
- › Revenue & volume forecasts



› Revenue & volume per capita



› Comparable data



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Access to more than 1,000,000 statistics and all consumer markets

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ABOUT DIGITAL MARKET OUTLOOK

9 Markets, 36 segments & 94 sub-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

Details

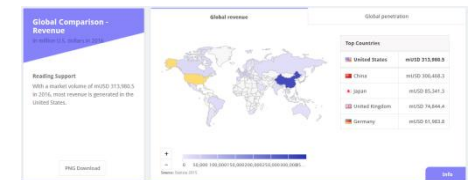
- › 50 countries
- › Direct access & downloads
- › 7-Year coverage: 2015 - 2021
- › Revenue forecasts



- › User count and demographics



- › Comparable data



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1: You find a complete index of figures in the following slides

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