

# Used smartphones: the \$17 billion market you may never have heard of

Deloitte Global predicts that in 2016 consumers will sell outright or trade-in approximately

# 120 million

used smartphones generating *more than*

# \$17 billion



This is a marked increase from the **80 million smartphones** traded in 2015 with a value of **\$11 billion**.



We predict that used smartphones will represent about **seven percent of the total smartphone sales by units in 2016**. Up from five percent in 2015.

## Why would you sell a smartphone?



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# Virtual reality (VR): a billion dollar niche

Deloitte Global predicts that VR will have its

# first billion dollar year

in 2016, with about

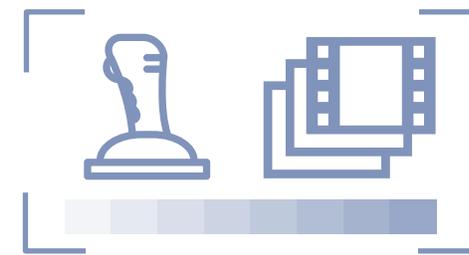
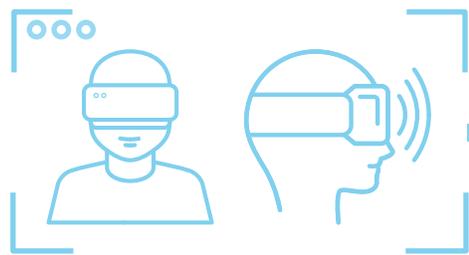
## \$700 million

in hardware sales

and

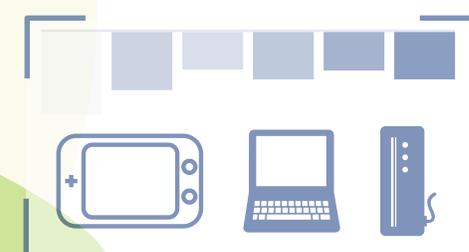
## \$300 million

from content



We estimate sales of about  
**2.5 million VR headsets**  
and **10 million games**

The main usage of VR in 2016  
will be for **video games**,  
on smartphones, tablets, games  
consoles or PCs.



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# Touch Commerce: the mobile online checkout gets an express lane

Deloitte Global predicts that in 2016, the number of individuals who use a third party touch-based payment service to make a purchase on their mobile devices (smartphones and tablets) should **increase 150%**, to reach

## 50 million regular users



Majority of touch commerce to be made possible by **payment and address information stored in the device's operating system**



**Reduces browsing to payment time to seconds**

A statistic from the Deloitte Mobile Consumer Survey – **A third of respondents in developed markets browse shopping websites on a weekly basis**



or through a payment service provider. **Payments authorised by fingerprint or one/two clicks**

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# Graphene: research now, reap next decade

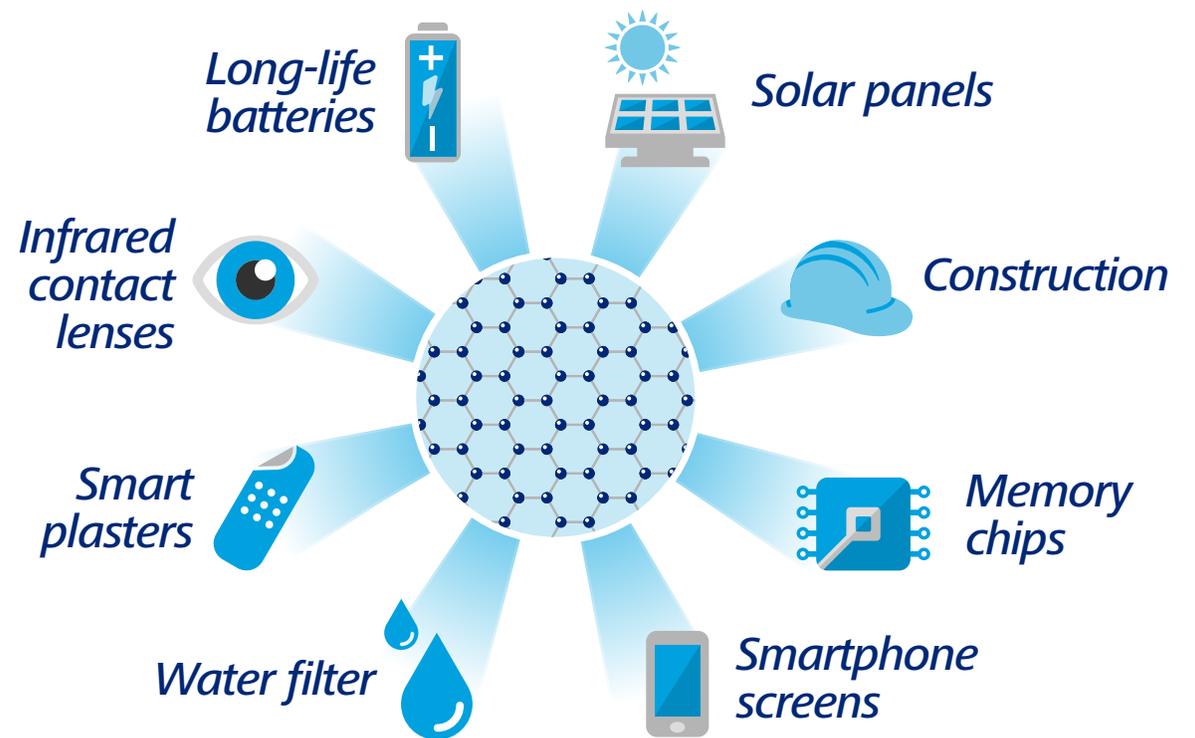
Deloitte Global predicts the total value of the graphene materials market in 2016 is likely to be in the

low tens of millions of dollars

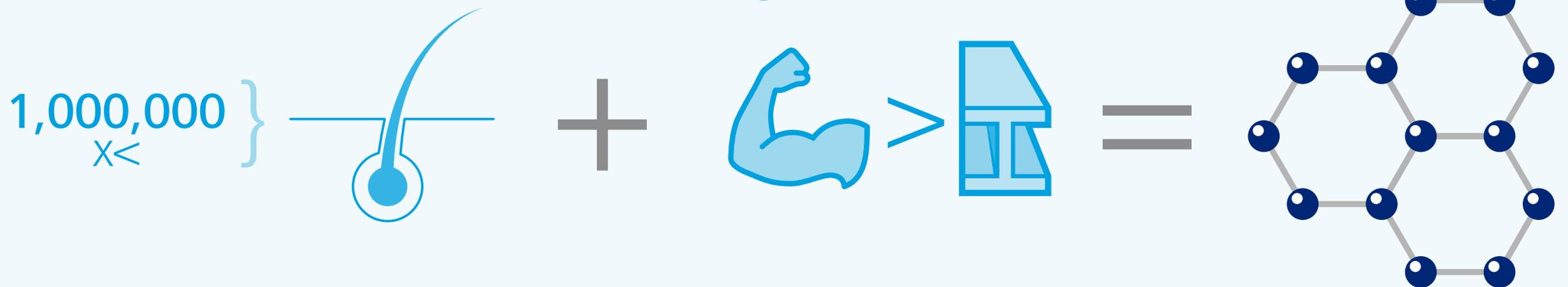


yet research and development spending is likely to be in the hundreds of millions of dollars

Graphene could be used for



Graphene is a *two-dimensional structure single atom thick*, which is *a million times thinner than a human hair* and *stronger than steel*.



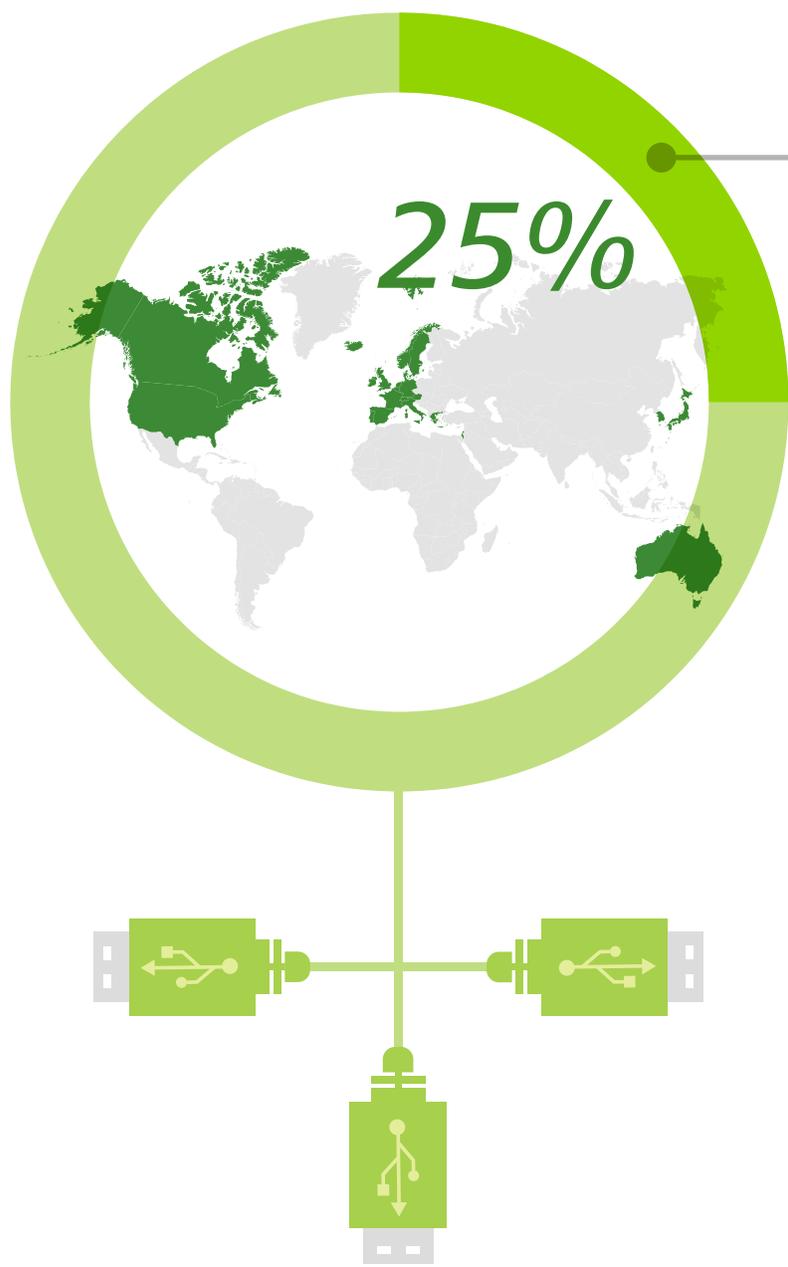
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# Women in IT jobs: it is about education, but also about more than just education



Deloitte Global predicts that by end-2016 fewer than 25% of information technology (IT) jobs in developed countries will be held by women. *This is about the same level as 2015*



The barriers to overcome are:



**Gender gaps in the education pipeline**  
(low numbers of women are graduating with IT qualifications)



**Bias in advertising of positions**



**Bias in recruiting**



**Retention of female staff**



**A deemed "glass ceiling" in terms of promotion and pay**



Hope of things to come:

**More women in IT jobs than graduating with IT qualifications**

**Number of women across different types of IT roles is growing**

**More senior positions held by women than ever before**

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# Trailing millennials are the pro-PC, not the post-PC, generation



Deloitte Global predicts that *trailing millennials (18-24 years old) will likely have higher ownership, intent to purchase and use of PCs than any other age group in 2016.*

## 18-24 year-olds consider smartphones and PCs as complements, not substitutes.

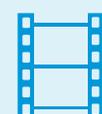
They are more than willing to have a laptop open in front of them and hold a smartphone in their other hand.



PCs still preferred for



Computer games



Watching long videos



Creating/editing content



Streaming/downloading content



Banking



Purchases



Work/study

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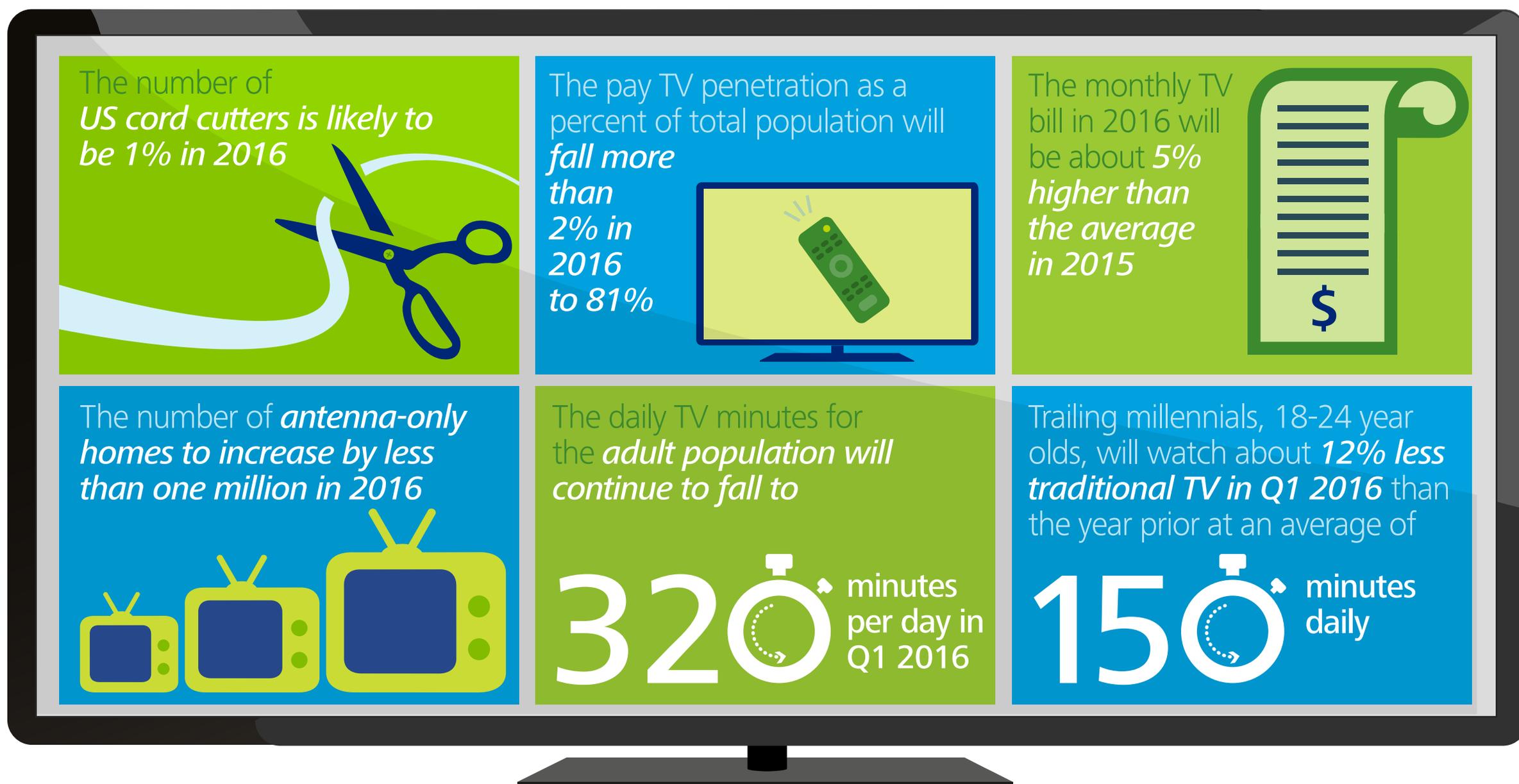
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# US TV: erosion, not implosion

Deloitte Global predicts that

*the US traditional television market, the world's largest at about \$170 billion in 2016,* will see a slow and steady erosion in at least six areas



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# Mobile ad blockers: saved by the app?

Deloitte Global predicts a

**minority (0.3%)** of all mobile device owners (comprising smartphones and tablets) will use an ad-blocker by end-2016

## Effects of using an ad blocker

*Visible advertisements gets barred*

*Trackers get barred*  
(which log the user's online activity)

*Faster page load times on mobile devices*

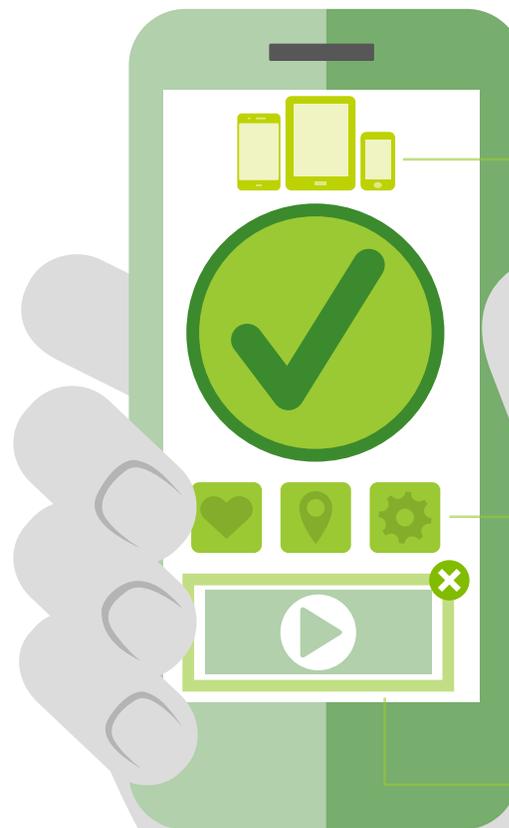


## Why so few ad blockers

*Only a few devices have native ad-blockers installed*

*Ad blockers don't work within apps and there may be a fee to pay*

*They do not remove 100% of ads*



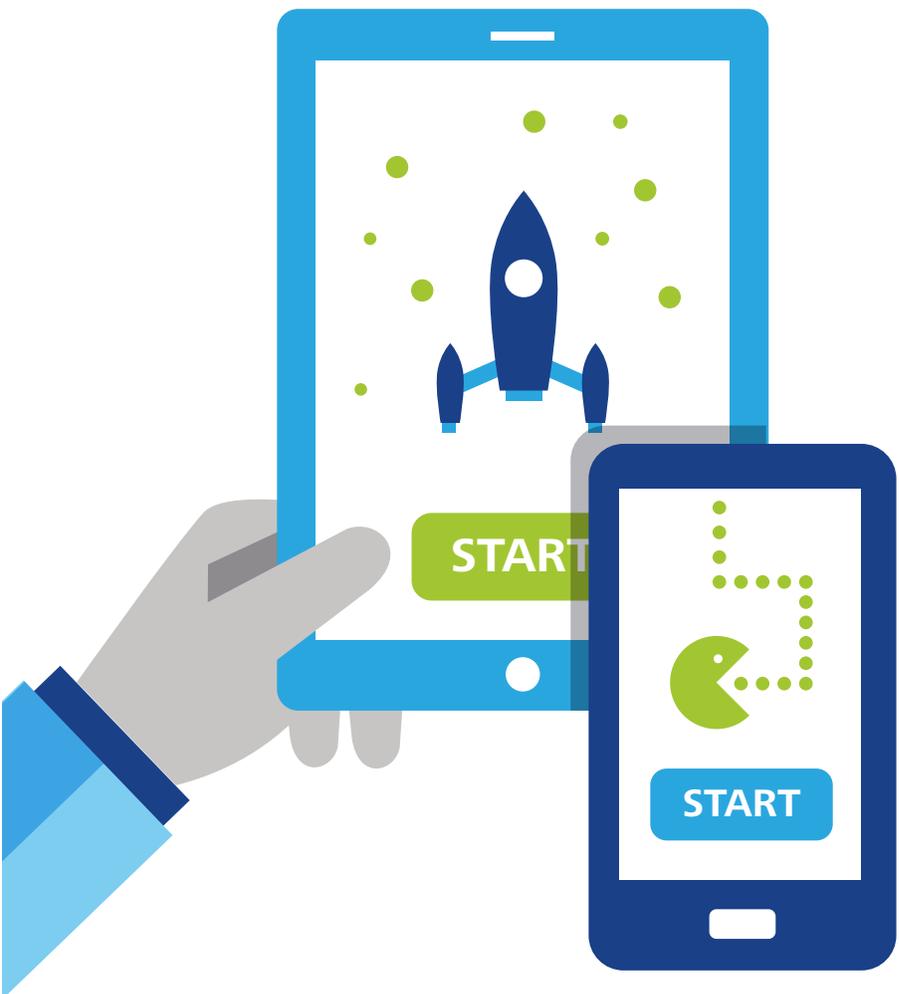
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# Mobile games: leading, but less lucrative



Deloitte Global predicts that in 2016 mobile (smartphone and tablet) will become the leading games platform by software revenue, generating

# \$35 billion

in revenue *up 20% from 2015*

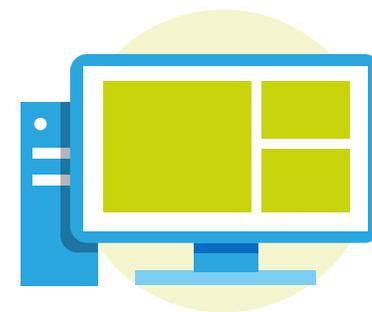
We estimate average  
*annual spend on content per mobile games player* **\$20**  
to be about

This compares to **\$50 per PC games player,**  
and **\$145 per console player**

We estimate about

# 1.75 billion

mobile devices (smartphone and tablet) will be used to play games frequently as of end-2016.



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# eSports – bigger and smaller than you think

Deloitte Global predicts that eSports will generate global revenues of

# \$500 million

in 2016, up 25 percent from \$400 million in 2015



Deloitte Global predicts that eSports may have an audience of regular and occasional viewers nearing

# 150 million people



Large growth in popularity in the near future could make the numbers of viewers comparable to established major sports events.

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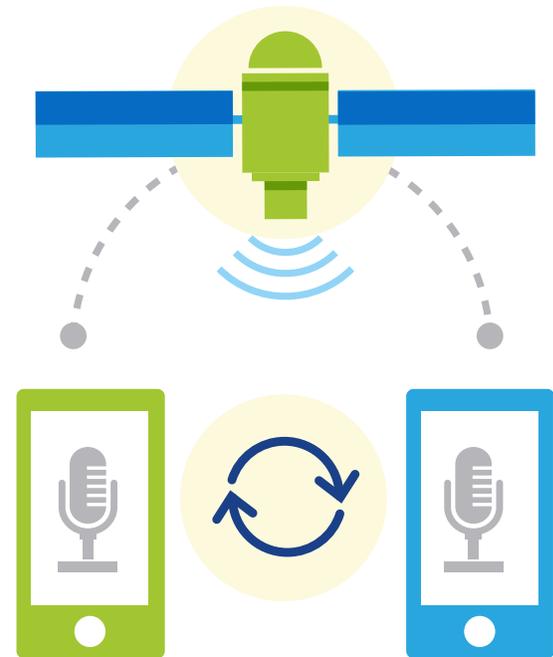
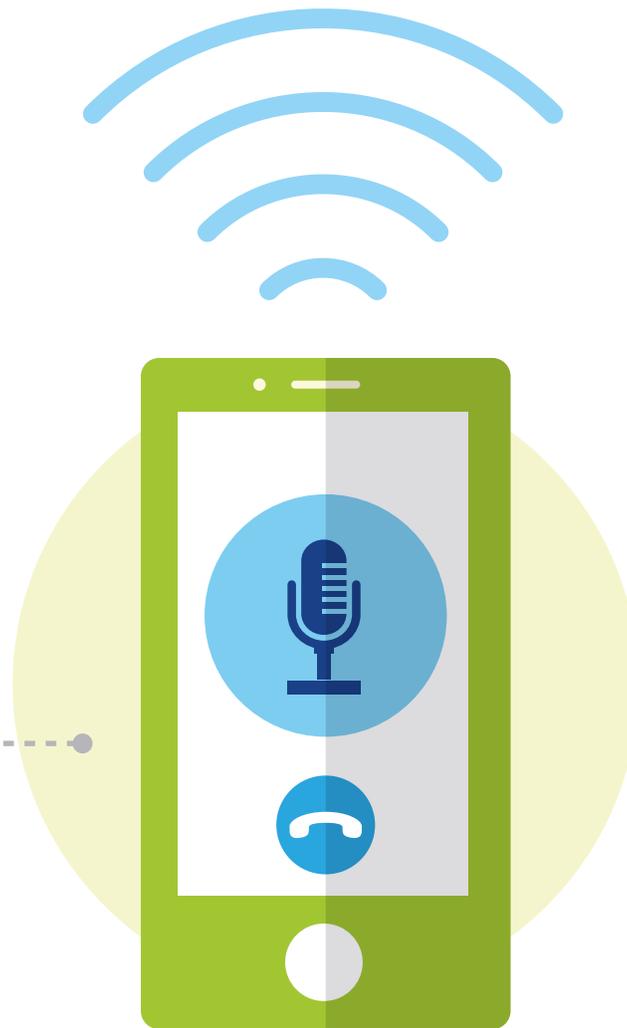
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# VoLTE and VoWiFi – capacity, reach and capability

Deloitte Global predicts that about

**100** mobile operators

worldwide **will be offering at least one packet-based voice service** at the end of 2016, double the amount year-on-year, and six times higher than at the beginning of 2015.



## *What is VoLTE /VoWiFi?*

Network operator managed call using a data connection (i.e. not an app).

We estimate that approximately

**300 million**

customers **will be using VoLTE and/or VoWiFi at the end of 2016**, double the number at the start of the year and five times higher than at the beginning of 2015.

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# European football scores \$30 billion



Deloitte Global predicts that the **European football market** will generate

# \$30 billion

in revenues in 2016/2017, an \$8 billion increase relative to 2011/2012.

Most of **this growth is being driven by the five largest leagues** (England, France, Germany, Italy and Spain). These top five are expected to generate approximately

# \$17 billion

(58%) of total revenues in 2016/17.

**A virtuous cycle:** The more revenues a club can generate, the more it has to...



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# The dawn of the Gigabit Internet age: every bit counts

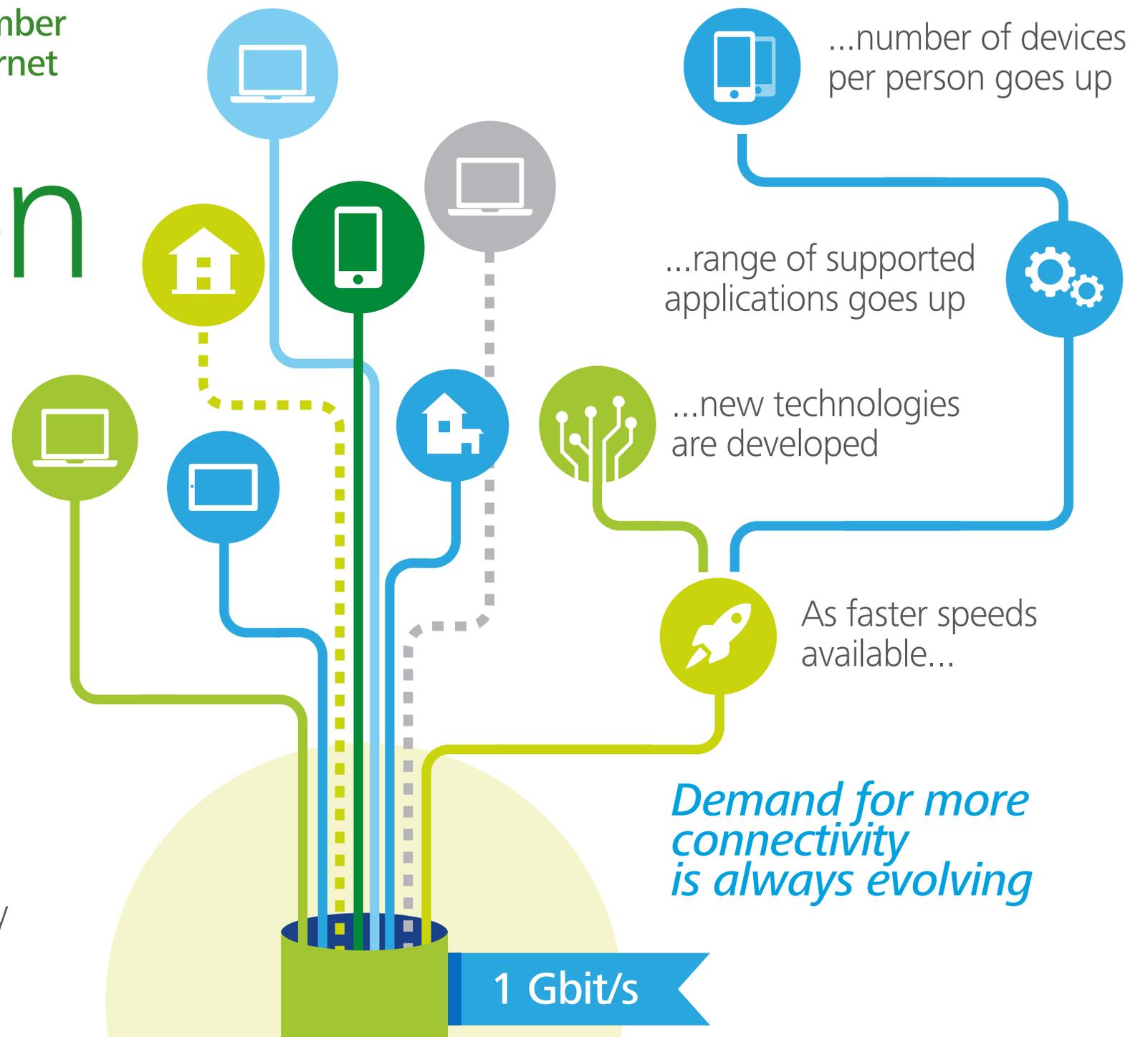
Deloitte Global predicts that **the number of Gigabit per second (Gbit/s) Internet connections** will increase to

# 10 million

by end-2016, a tenfold increase, of which about **70% will be residential connections**

## Factors for demand:

- ✓ Increase in devices requiring bandwidth
- ✓ Affordability
- ✓ Development of fiber technology (able to deliver Gbit/s speeds)



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# The award for stable box office revenues in the face of digital media goes to...

Deloitte Global predicts that the **value of movie theater admissions in the U.S. and Canada will fall by about three percent in 2016, to about**

# \$10.6 billion



with about

# 1.3 billion

tickets sold



The top five blockbusters released in the year generate the bulk of box office revenue



*Revenues are determined by:*

- ✓ Ticket sales
- ✓ Ticket prices
- ✓ Concessions
- ✓ Premium experiences (e.g. 3D and IMAX)
- ✓ Other uses of cinema venues (e.g. eSports)

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# Cognitive technologies enhance enterprise software



Deloitte Global predicts that by end-2016

*more than 80 of the world's 100 largest enterprise software companies*

by revenues will have one or more integrated cognitive technologies to their products.

By:

2015

64 of the top 100

end-2016

80 of the top 100

2020

about 95% of the top 100

*...will launch products with cognitive technologies*

## *Types of cognitive technologies expected to bring benefits in 2016:*

- ✓ Machine learning
- ✓ Natural language processing
- ✓ Speech recognition
- ✓ Improving core existing functionalities
- ✓ Generate insights from data
- ✓ Automation of previously manual tasks

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**#TMT** *predictions*

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# Photo sharing: trillions and rising

Deloitte Global predicts that in 2016,

# 2.5 trillion photos

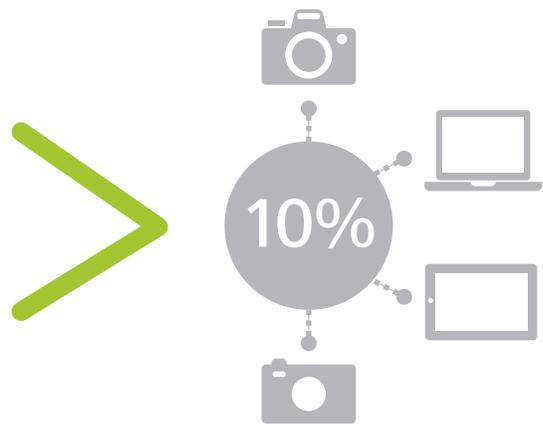
will be shared or stored online,

**a 15% increase on the prior year.**

About three-quarters of this total will be shared, and the remainder backed up online.

Deloitte's estimate is that over

**90% of these photos will have been taken over smartphones**



Digital SLRs, compact cameras, tablets and laptops will collectively contribute the remainder.



## Why is it rising?

- ✓ Ease of uploading / sharing
- ✓ Ubiquity of smartphones
- ✓ Increase in quality of smartphone cameras
- ✓ Increased network speeds
- ✓ Online photo back-up services
- ✓ Large number of photosharing apps

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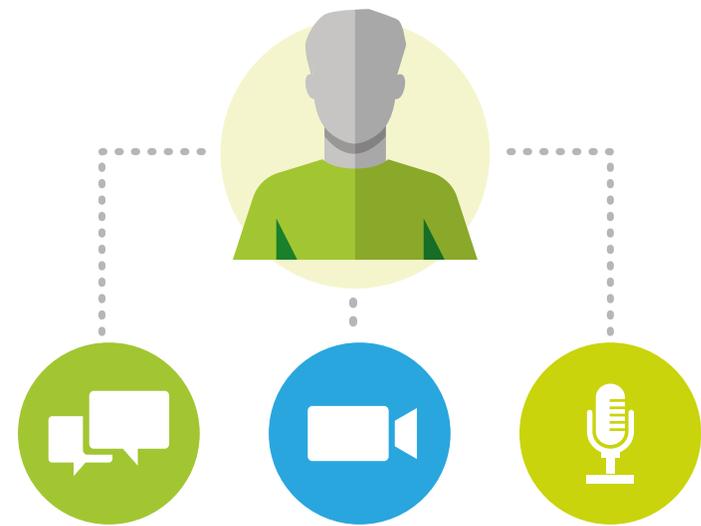
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# The rise of the data exclusive

Deloitte Global predicts that in 2016,

**26%** of smartphone users in developed markets *will not make any traditional phone calls in a given week*



A “*data exclusive*” – someone that substitutes voice calls for a combination of messaging (including SMS), voice and video services delivered ‘over the top’.

## *Drivers for this trend:*

- ✓ Apps developed to eliminate need to make calls
- ✓ No real-time response required
- ✓ Affordability of messaging over WiFi

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