

Press release

Contact: Isabel Box
Press & Communications
Tel: + 32 2 302 25 51
Mobile: + 32 485 31 79 63
E-mail: ibox@deloitte.com

COVID-19 pandemic drives growth in virtual doctor visits, women and tech in sports, cloud and virtual reality

Deloitte TMT Predictions 2021

Brussels – 23 February 2021 Deloitte Belgium today released the 20th edition of its Technology, Media & Telecommunications Predictions, which highlights how worldwide trends in TMT may affect businesses and consumers worldwide. In addition, the report highlights how many of these trends are being driven by the global pandemic's economic and societal impacts, resulting in intensifying growth in video, virtual, and cloud technologies, as well as in media segments such as sports.

Vincent Fosty, Deloitte Belgium TMT Industry Leader: *“Unsurprisingly, the dominant theme in the 2021 Predictions is the way in which COVID-19 has acted like a chemical catalyst, making what was already happening happen much faster. Many years of progress have been achieved in as many months.”*

Doctor visits move to video

The global COVID-19 pandemic not only necessitated the elimination of regulatory barriers to doctor visits but also helped consumers better understand and leverage video calling apps, especially consumers over the age of 65. Despite some initial trepidation, the TMT Predictions report illustrates how many consumers (and doctors) have been willing to shift to virtual appointments, including video visits. Deloitte Global predicts that the percentage of virtual video visits to doctors will rise to 5% globally in 2021, up from an estimated 1% in 2019. 8.5 billion doctor's visits took place in the 36 OECD countries in 2019 alone. In Belgium, there were 3.8 million online visits between March and May 2020 according to Inami.

Women and tech transform sports

While the number of sporting events slowed during 2020, the potential for growth ultimately did not. Deloitte Global predicts that two major trends in sports—the increased monetization of women's sports, and the use of digital to create a hyper-quantified athlete—will continue their upward trajectory.

Women's sports is also gaining momentum in Belgium, as seen with the return of Tessa Wullaert, the captain of the Belgian Red Flames, to professional football team RSC Anderlecht Women after a career at top clubs such as Wolfsburg and Manchester City. Moreover, the national lottery stepped up as the main sponsor of the Belgian Women's Super League with a four-year deal linking their online sports betting brand to the league's name, Scoore Super League¹.

¹ https://www.nieuwsblad.be/cnt/dmf20200824_96310631

This professionalisation and the mediatisation of women's football is reflected in the number of Belgian female footballers which has risen by 75% since 2013 to a total of 40,000 in 2019². However, the share of women footballers amounts to less than 10% of the total number of footballers in Belgium.

Another ongoing shift in sports involves the use of athlete data collection and analysis. With this data becoming increasingly real-time, it is now possible to measure indicators inside as well as outside the body, creating hundreds of new metrics to feed into decision-making—creating, essentially, the digital athlete. *"With the hyper-quantified athlete offering such strong potential, it remains to be seen if a standard agreement will emerge between players and leagues across sports around the collection, use, and monetisation of private and sensitive information. The question is also how performance data will be used to enhance the in-stadium and remote fan experience,"* said **Tim Baart, Sports Business Group Leader in Deloitte Belgium.**

Education and the enterprise opt for virtual reality

Augmented reality, virtual reality and mixed reality headsets, collectively known as XR or digital reality, are increasingly being used at work and school. Deloitte predicts that sales of XR headsets for the enterprise and education markets in 2021 will be around 200,000 units worldwide, 100% more than in 2019.

Tim Houben, Media Sector Leader for Deloitte Belgium: *"All age groups that own VR glasses are increasingly using them for VR gaming, virtual tours and VR video entertainment. There is also a notable increase in out of home use of VR glasses in cultural centres (museum, city tours, churches) with the percentage of people having used VR but not owning a device themselves increasing by 7% to 35% in comparison to 2018."*

The pandemic drives cloud growth

Deloitte Predicts that cloud revenue growth globally will remain greater than 30% for 2021 through 2025 as companies move to cloud to save money, become more agile, and drive innovation.

With the pandemic driving more enterprises toward cloud, the market will likely emerge from the pandemic stronger than ever. Cloud providers and others in the ecosystem will also have the opportunity to capitalise on increased usage, while cloud users can seek to explore new ways for the cloud to create value. *"In the near future, cloud technologies may become the dominant solution across all types of businesses,"* concluded **Jan Corstens, Technology Sector Leader.**

More insight from Deloitte's 2021 TMT predictions:

- **Gaining an intelligent edge:** Edge computing and intelligence could propel tech and telecom growth. In 2021, the market for the intelligent edge will reach US\$12 billion, up over 80% from 2019, driven by growth from telecoms and hyperscale cloud providers.
- **The 8K wave begins:** Sales of 8K TVs are likely to reach US\$5 billion in 2021, with equipment and services for producing 8K content generating hundreds of millions of dollars more.

About the 2021 TMT Predictions

To ensure sustained business growth, it is critical that organizations address the increasing disruption posed by emerging technologies. Deloitte's Technology, Media & Telecommunications (TMT) industry practice brings together thought leaders and trusted specialists to shape many of the world's most recognized brands in these fields. Through its work, the TMT team aids clients in creating competitive advantage and helps them succeed in an increasingly digital world. Deloitte Global's annual TMT predictions serve as guideposts for future business strategy by providing a 1-3 year outlook on key trends in the global technology, media, and telecommunication industry sectors. The trends are based on a global analysis of figures and developments for each topic and help identify key challenges and areas of focus for the world's TMT brands as they navigate the impact of new technologies shaping the future of industry.

² <https://www.rbfa.be/nl/theworldatourfeet>

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