

Gathering velocity

Technology will continue to transform how we work and live—in 2021 and beyond



Intelligent edge

Racing to the edge

As technologies mature and combine, tomorrow's internet will dwarf today's.

\$12B By 2021
5G, hyperscale cloud, and other edge techs will drive a \$12B market (growing at 35% CAGR).

70% By 2023
70% of enterprises will be using the intelligent edge.

\$16B By 2025
The edge data center market will reach \$16B.

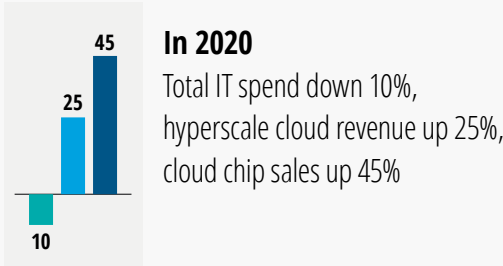
Vehicles, VR, and the Internet of Things—faster, cheaper, more secure, and paving the way for the Fourth Industrial Revolution.



Cloud migration

For cloud computing, a sunny forecast

Amid lockdowns, COVID-19 made cloud a rare focus of growth. Soon it will be standard.



2x Cloud internet traffic doubled 2019 volume during the pandemic.

30% In 2021
Cloud revenue will grow >30% annually through 2025.

\$150B In 2022
Hyperscale capital spending will top \$150 billion.

The more the cloud grows, the more space there is to mine it for value creation.

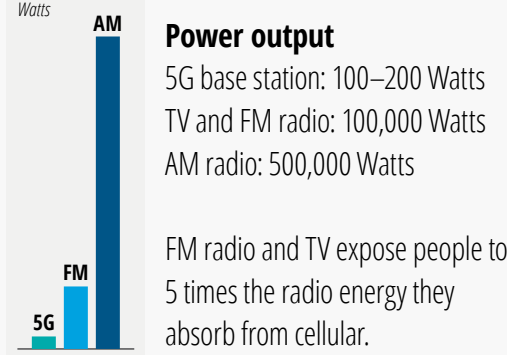


5G and health

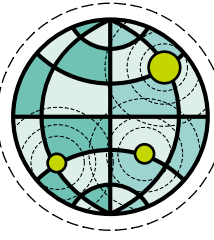
Facts versus fears

New 5G cellular networks use far less energy than radio or TV and present no proven health risks. But some people still fear it causes cancer and spreads COVID-19.

13% to 36% Public perception
13% to 36% of people in 14 countries believe 5G presents health risks.



5G actually uses less transmitting power than 4G. Clear, consistent messaging will be necessary to overcome myths about its danger.



Open RAN

Proprietary no more

Advanced mobile services will rely on the flexibility of open, virtualized Radio Access Networks (RAN).

70+ By 2021
More than 70 open RAN trials active, doubling current activity.

80% By 2023
80% of core wireless network deployments will be virtualized.

10x By 2025
Open RAN share of the RAN market may grow 10 times or more.

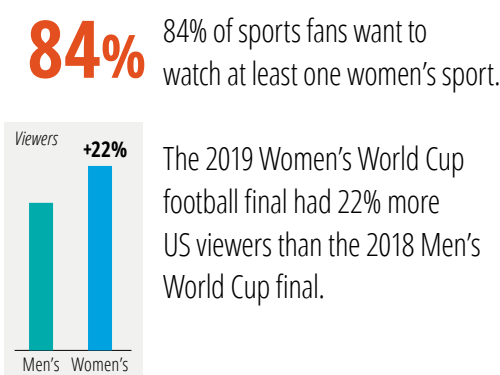
History repeats itself as closed gives way to open and hard gives way to virtual.



Women in sports

Ready for the spotlight

Women's sports still trail men's sports in market value—but they're growing faster and targeting the \$1 billion mark.



Keys to growth: more investment, more content, more stories, bigger venues.



The digital athlete

A new peak for performance

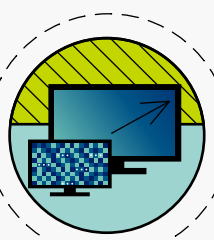
Athletes everywhere are finding a new edge in data and analytics. How can sports benefit effectively—and ethically?

\$500M In 2019
\$500 million lost to injuries in the NFL alone.

3k Since 2014
3,000 sports tech deals.

\$150B By 2024
Global sports betting will reach \$150 billion.

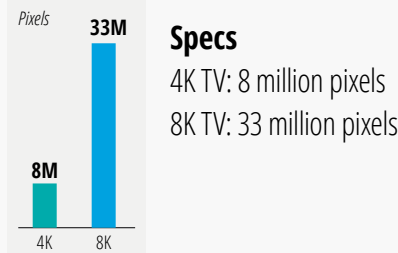
Leagues will need new policies built on a foundation of openness and trust.



8K TV

Bigger, sharper TVs

The standard for image quality—and bragging rights—is rising yet again.



\$2.5B In 2020
8K TV sales total \$2.5 billion.

1M In 2021
8K TV sales will reach 1 million units (out of a total 220M-unit market)/\$3.3 billion and rising.

\$1.5k 8K sets will average \$3,300 but entry level will fall to \$1,500.

As 8K TVs grow in the market, the cameras and equipment to generate 8K content will grow in parallel.



Digital reality

Virtual gets real

Headsets improve learning, conquer distance, and keep danger away. They're a small market on a fast track.

2x In 2021
Enterprise and educational revenue for XR headsets will be twice 2019 levels.

32% Enterprise VR increases productivity 32%.

75% AR training boasts a 75% retention rate.

As pilot projects mature into full deployments, headset hardware will claim a greater percentage of project value



Virtual medical visits

Medicine at a distance

Video doctor consultations were "coming soon" for years—until COVID-19. Now it seems they're here to stay.

43% In spring 2020
April Medicare primary visits were 43% telehealth (April 2019: 1%).

12x Veterans' Affairs video visits hit 120K/week (12 times previous year).

40% to 100% Video consultations in France rose 40% to 100%.

5x In 2021
5% of doctor visits will be virtual—5 times the 2019 level.

\$25B 400 million virtual visits will represent \$25 billion.

Technology and acceptance have both advanced quickly—now, service and payment systems need to catch up.

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The insights represented here are only part of the picture. Explore our full report on 2021 predictions to get more details on the emerging landscape.

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