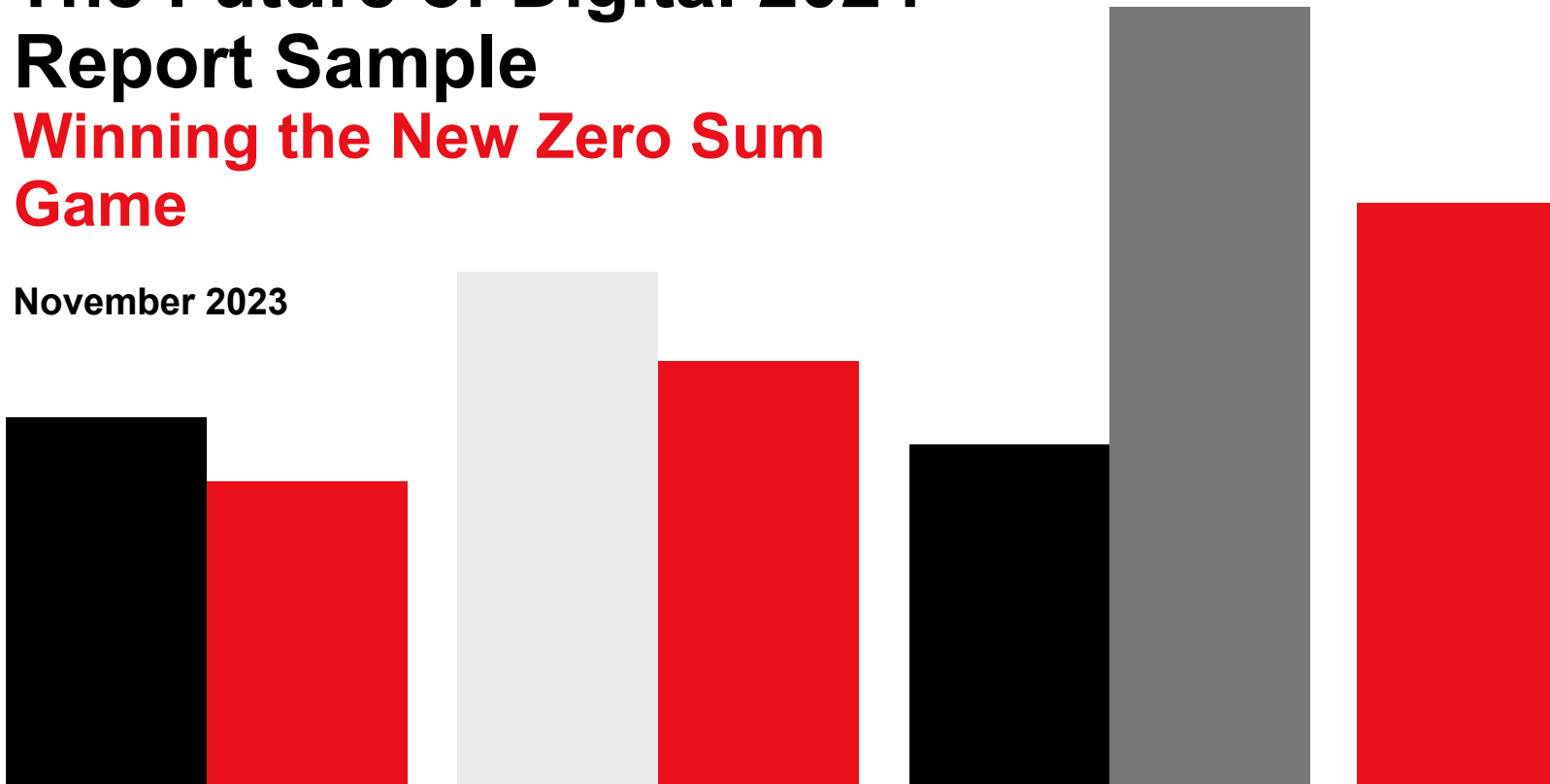


The Future of Digital 2024 Report Sample

Winning the New Zero Sum Game

November 2023



This is a small sample of the report.
The full report is available to our clients.

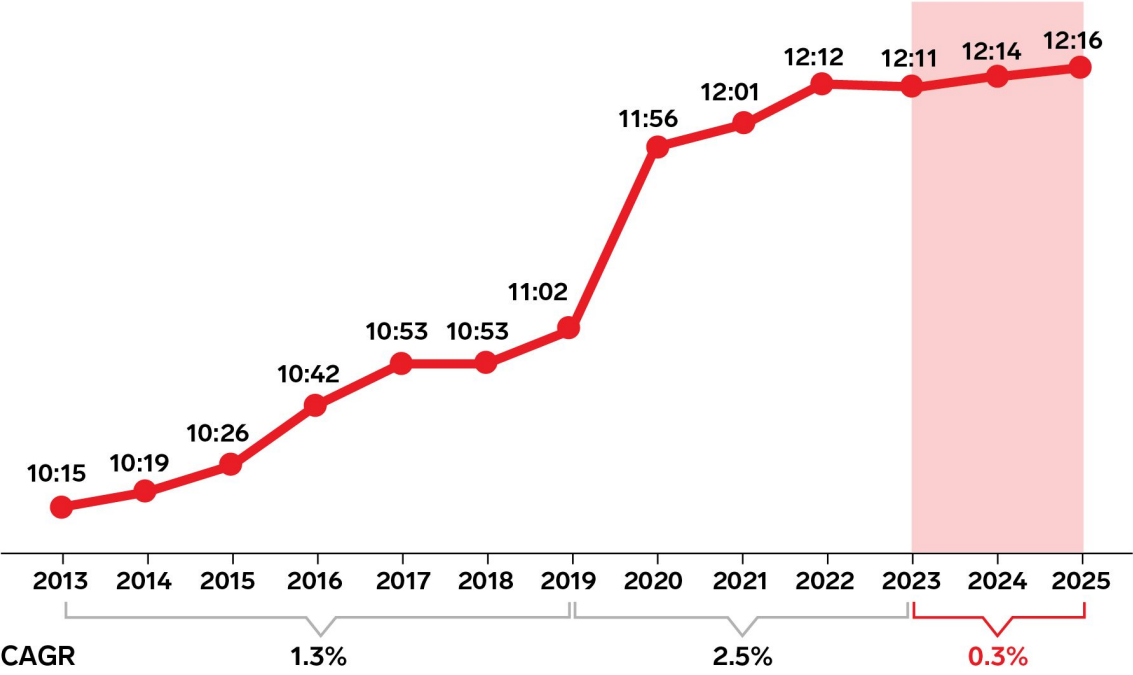
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AGENDA

- 1 | Beyond the boom**
- 2 | How consumers spend time**
- 3 | How consumers spend money**
- 4 | Converging business models**
- 5 | Opportunities for advertisers**
- 6 | Opportunities for retailers & brands**

Time spent on media has reached a plateau

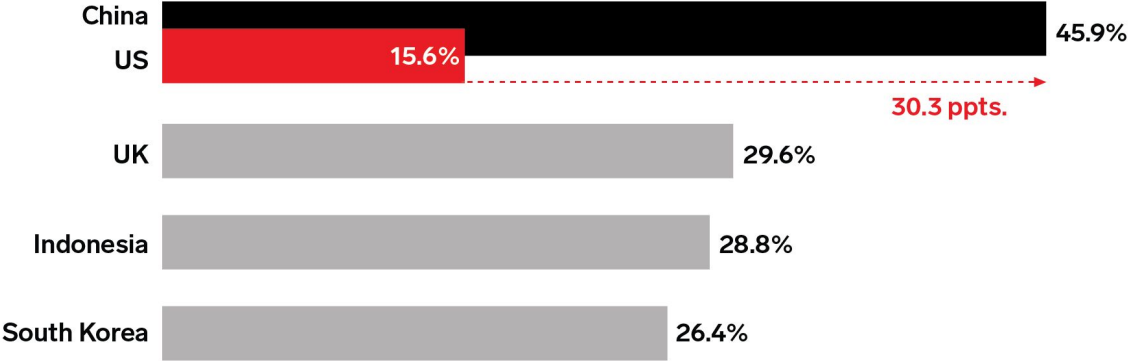
hrs:mins spent on media per day per US adult



Note: ages 18+; includes time spent with digital internet activities (desktop/laptop, nonvoice mobile, connected TV, and other connected devices), print, radio, TV, and other traditional media including printed catalogs, direct mail, cinema, and out-of-home
Source: Insider Intelligence | eMarketer Forecast, June 2023

A few leading countries show that US ecommerce penetration has a lot of room to grow

ecommerce % of retail sales in each country, 2023



Note: includes products or services ordered using the internet, regardless of the method of payment or fulfillment; excludes travel and event tickets, payments such as bill pay, taxes, or money transfers, restaurant sales, food services and drinking place sales, gambling and other vice goods sales; China excludes Hong Kong; China, Indonesia, and South Korea forecasts from June 2023
Source: Insider Intelligence | eMarketer Forecast, Nov 2023

Business models are converging as big players replicate one another's playbooks



Retail media is the latest big digital ad trend, with Amazon leading the way



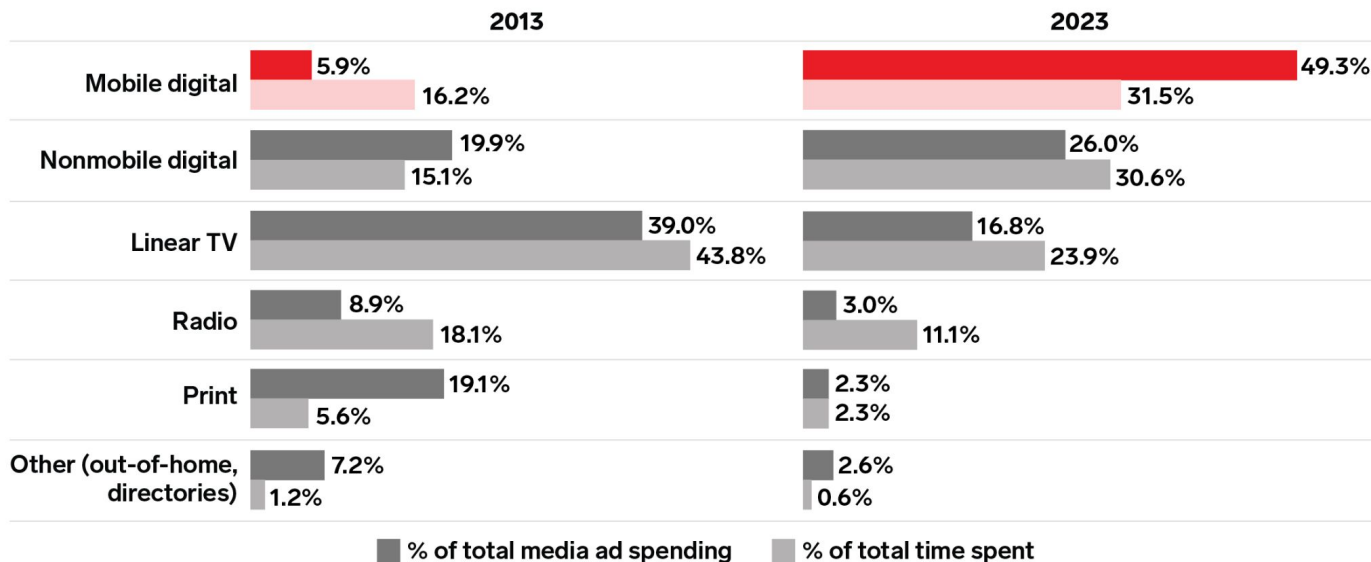
TikTok is building an Amazon-like flywheel across media, advertising, and commerce



Everyone's racing to leverage AI

Marketers have shown they can evolve their budgets over time — but sometimes they overshoot

% of US total media ad spending vs. adult time spent

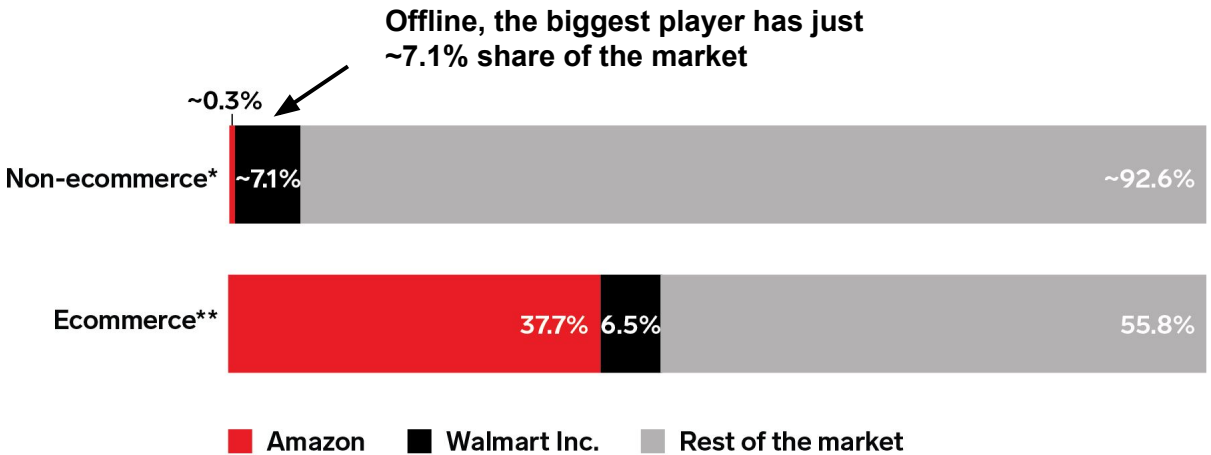


Note: ages 18+; includes time spent with digital internet activities (desktop/laptop, nonvoice mobile, connected TV, and other connected devices), print, radio, TV, and other traditional media including printed catalogs, direct mail, cinema, and out-of-home; total media ad spending includes digital (desktop/laptop, mobile, and other internet-connected devices), directories, magazines, newspapers, out-of-home, radio, and TV

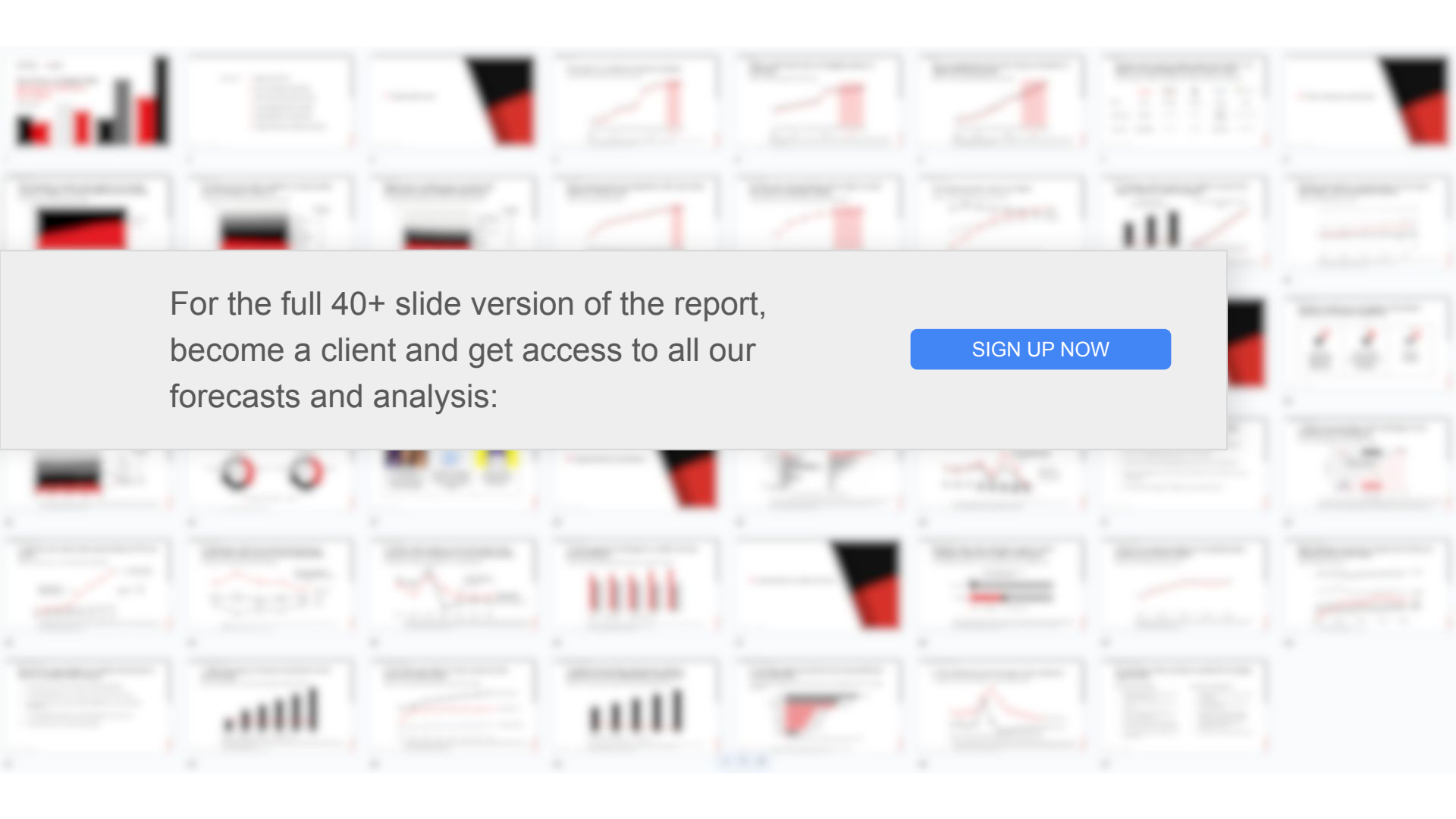
Source: Insider Intelligence | eMarketer Forecast, Oct 2023

Retailers' shift online pits them against a giant competitor that has no offline counterpart

% of US retail ecommerce vs. non-ecommerce sales, by company, 2022



*Note: retail excludes travel and event tickets, payments such as bill pay, taxes, or money transfers, restaurant sales, food services and drinking place sales, gambling and other vice goods sales; *non-ecommerce figures based on company earnings and are not official Insider Intelligence | eMarketer estimates; **ecommerce includes products or services ordered using the internet, regardless of the method of payment or fulfillment*



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