

# Enabling technologies

## Longer Term Investments (LTI)

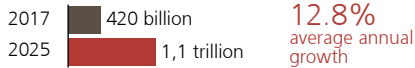
Tech devices and advances have disrupted every aspect of our lives. And over the next decade, spending on the underlying enabling technologies that allow their development and production should remain high as both disrupting and incumbent companies continue to invest in order to increase or defend market share.



### Projections and opportunities

#### Annual growth

We expect the market for the five enabling technologies – AI, AR/VR, 5G, cloud and Big Data – to grow by an average 12.8% annually from USD 420bn in 2017 to USD 1.1trn in 2025.



Source: UBS

#### Big Data

Every week 2 billion messages are exchanged between businesses and customers on FB Messenger.



Source: Facebook, Bloomberg Intelligence, UBS

#### Artificial Intelligence

800,000 smart speakers are shipped in the US every week.



Source: eMarketer, Bloomberg Intelligence, UBS

#### 5G

Every week 14 billion minutes of video and voice calling happens on WhatsApp, according to Facebook.



Source: Facebook, Bloomberg Intelligence, UBS

#### Cloud

500 million users visit Apple's App store every week.



Source: Apple, Bloomberg Intelligence

#### AR/VR

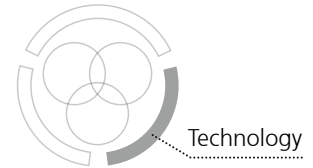
Every week 200,000 virtual reality devices are sold.



Source: IDC, Bloomberg Intelligence, UBS



Enabling technologies investment properties



○ Influencer    ⊗ Key drivers



Near-term drivers

- Technologies disruptors
- Urbanization

