

# Digital Native Business, Start-Ups and Scale-Ups

AN IDC CONTINUOUS INTELLIGENCE SERVICE

IDC's *Digital Native Business, Start-Ups and Scale-Ups* advises technology suppliers on the dynamics, tech-buying patterns, and go-to-market approaches needed to effectively reach and engage digital-native organizations.

## Markets and Subjects Analyzed

The digital-native market segment represents an emerging and fast-growing group of organizations that were born in the digital-native era (i.e., post-2000). These organizations are obviously very tech centric and spend a significant amount of money on technology as it is the basis of their business model. However, the industry clusters and relative maturity of digital-native organizations vary dramatically. And the difference between an early-stage digital-native start-up and a scale up that has reached Series D funding and is potentially valued in the billions of dollars is significant. Hence tech vendors that are targeting this segment need to understand these dynamics. This research program provides the following:

- A taxonomy to help organizations understand in which areas the digital-native businesses play (by industry segment)
- Spending opportunities (how much they spend on technology and which areas are priorities) (This will look at the key opportunities in the various segments [edtech, martech, medtech, and fintech].)
- Survey feedback to understand which technologies are driving spend and how the digital-native organizations procure and deploy these technologies
- Feedback from these organizations in terms of where they need help from enterprise tech vendors to drive growth
- Examples of how the C-suite operates in the digital-native segment

## Core Research

- The Digital-Native Spending Taxonomy
- The Digital-Native Opportunity Forecast
- The Digital-Native Spending Patterns Survey
- B2C Digital Natives Versus B2B Digital Natives Perspective
- Case Studies and Profiles of Digital-Native Businesses, Covering B2B and B2C
- Vendor Profiles and Best Practices for Engaging with Digital Natives, Start-Ups and Scale-Ups

In addition to the insight provided in this service, IDC may conduct research on specific topics or emerging market segments via research offerings that require additional IDC funding and client investment. To learn more about the analysts and published research, please visit: [Digital Native Business, Start-Ups and Scale-Ups](#).

## Key Questions Answered

1. How do we size and segment the digital-native opportunity based on a new IDC taxonomy, addressing fast-growth companies in B2C areas such as health, fashion, marketing, retail, and gaming.
2. What does the current B2B digital-native landscape look like? And what is the associated digital-native opportunity?
3. Where is growth in tech spend primarily coming from in the digital-native segment?
4. Which technology areas are driving spend among digital-native organizations, and how are these being deployed (i.e., build versus buy)?
5. How do digital natives budget for, procure, and deploy technology compared with traditional organizations?
6. How do digital natives move from start-up to scale up, and how can tech vendors engage with them through venture capital and accelerators to help them deliver growth?
7. Who are the preferred partners and vendors digital natives work with, and how do they influence their buying decision?

## Companies Analyzed

This service reviews the strategies, market positioning, and future direction of several providers in the digital-native business market, across the following areas:

- **Fintech:** Klarna, Monzo, Revolut, Stasch, Tink, and Venmo
- **Healthtech:** 98point6, Babylon, EverlyWell, and GlamScout
- **Proptech:** Avail, Headback, Houseology, Open Listings, and Rentberry
- **Edtech:** Creative Live, Masterclass, Udacity, and Udemy
- **Govtech:** Citymapper, CivicInsight, Plume, and Rubicon
- **Autotech:** CarlQ, Nauto, Scutum, Smartdrive, and Zendrive
- **Mediatech:** Buzzsprout, Discord, and Esports Arena
- **Martech:** Bespoke Post, Bright Cellars, and Stitch Fix
- **Digital-Native Ecosystem:** Accenture PLC, Adobe Systems Inc., Alibaba Group Holding Ltd., Amazon.com Inc., Cisco Systems Inc., Dell EMC, Google LLC, HP Inc., Hewlett Packard Enterprise, IBM, Microsoft Corp., Oracle Corp., Oracle NetSuite, PricewaterhouseCoopers LLP, SAP SE, SAS Institute Inc., Sage Group PLC, Salesforce.com Inc., ServiceNow Inc., Snowflake Inc., and Workday Inc