

Australia Information Technology Report Q1 2016

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Abstracts

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BMI View: We believe our previous forecast understated the size of Australia's software and IT services segments, and as such historical data was revised upwards in Q116. We also adopted a more bearish analysis of IT hardware spending trends in 2015 this quarter, and now believe the market contracted as a result of a decline in tablet volumes after the rapid proliferation of ownership 2011-2014, a trend that was exacerbated by economic uncertainty and currency depreciation. In 2016 depreciation will continue to present challenges, particularly for retail hardware vendors, but the outlook brightens as the forecast period progresses, and we highlight opportunities including premium retail hardware spending, cloud computing and Internet of Things solutions and services. We forecast a CAGR of 4.2% for IT market spending over 2015-2019, but caution there is downside to our outlook due to the potential for a hard landing in China, though this is not our core scenario.

Latest Updates & Industry Developments

Computer Hardware Sales: AUD7.8bn in 2016 to AUD8.2bn in 2019. The market will recover from a sharp downturn in the tablet market in 2015, with significant opportunities identified in the premium device market over the medium term, but the growth rate will be relatively subdued due to market maturity.

Software Sales: AUD9.4bn in 2016 to AUD10.5bn in 2019. Enterprise application demand growth from small- and medium-sized enterprises as the software-as-a-service supply increases will be the main growth driver, while large enterprise spending growth will be more concentrated in complex solutions in a few verticals.

IT Services Sales: AUD22.0bn in 2016 to AUD25.7bn in 2019. IT services will be the fastest growth area of the IT market over the medium term, with cloud services the key growth driver.

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