

Australia Information Technology Report Q2 2016

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Abstracts

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BMI View: Australia's IT market is forecast to increase at a CAGR of 4.4% over 2016-2020 to AUD46.6bn in 2020, with software and services segments set to outperform. We expect cloud computing availability will see spending tick higher, while there are major opportunities for Internet of Things solutions, and we believe Australia could prove an early adopter of cognitive computing solutions due to its high labour costs in a low-cost region. Demand growth will be weaker in the hardware segment, where saturation across device categories means there is little low-hanging fruit for vendors - but the PC market is still attractive as it is highly lucrative in per capita terms with a strong bias towards premium devices.

Latest Updates & Industry Developments

Computer Hardware Sales: AUD7.8bn in 2016 to AUD8.4bn in 2020. Tablet volume volatility derived from the steep diffusion curve will stabilise over the medium term and put the overall market back onto a more stable trajectory based on replacement demand, but overall growth rates will be modest due to maturity.

Software Sales: AUD9.4bn in 2016 to AUD11.0bn in 2020. Data analytics software seeing strong demand, while application demand from small- and medium-sized enterprises should be driven higher by availability of software-as-a-service solutions.

IT Services Sales: AUD22.0bn in 2016 to AUD27.2bn in 2020. IT services will be the fastest growth area of the IT market over the medium term, with cloud services the key growth driver, and potential for Internet of Things and cognitive

computing solutions to gain traction due to Australia's high labour costs.

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