

# United States Consumer Electronics Report Q4 2015

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## Abstracts

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**BMI View:** Our core outlook for the US consumer electronics market remains in place in Q415, but we did make a minor upgrade to the smartphone growth forecast this quarter, with slightly higher volumes now envisaged for 2017-2019. This revision has only strengthened our view that the US consumer electronics market will remain the global leader in terms of market size and adoption of the latest technology 2015-2019. High device penetration rates, strong demand for the latest devices and short replacement cycles makes the US the most market lucrative for vendors - but high penetration also results in diminished growth opportunities in some of the key markets such as tablets and smartphones - particularly when compared to emerging markets. Furthermore, over the medium term we believe questions still remain about the sustainability of consumption in the absence of strong wage growth and the fact most sales will be upgrades rather than new consumers.

### Headline Expenditure Projections

Computer Hardware Sales: USD195.3bn in 2014 to USD200.4bn in 2015, +2.6% in US dollar terms.

Tablet volumes continue to be squeezed by a diminished pool of first-time buyers and lengthening replacement cycles.

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