

# United States Information Technology Report Q1 2016

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## Abstracts

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**BMI View:** We have left our forecasts for the US IT market unchanged for the Q116 report update and are forecasting another strong year for the IT market in the US. We forecast the overall market to reach a total value of USD707.3bn in 2016 and believe that the US IT market will be a strong performer versus other developed markets over the medium term, as a result of stronger macroeconomic performance and a greater interest from enterprises in the latest products and solutions. We have a particularly bullish outlook for the domestic cloud computing, real-time enterprise software, security and big data markets. We expect to see strong growth in these emerging technologies, particularly in the latter years of our forecast, and for the US to be at the forefront of global adoption and innovation. Meanwhile, the retail hardware outlook is more mixed, as we expect continued demand growth for tablets in the retail market once it stabilises after the rapid initial diffusion of ownership; however, desktop and notebook sales continue to be squeezed.

### Latest Updates & Industry Developments

**Computer Hardware Sales:** USD221.8bn in 2015 to USD226.8bn in 2016. Tablet volumes set to decline, but at a slower rate than in 2014, while traditional form factors are expected to continue gaining ground after steep declines in 2012 and 2013.

**Software Sales:** USD189.7bn in 2015 to USD199.4bn in 2016. Enterprise software-as-a-service adoption has strong momentum, deepening the market but also exerting price pressures on vendors, while demand for cybersecurity solutions is an area of faster growth.

IT Services Sales: USD266bn in 2015 to USD281bn in 2016. The Internet of Things ecosystem is developing rapidly, but as a proportion of the overall market remains small, while cloud computing adoption is already high in the US and we expect strong growth to continue over the medium term, helping to maintain the US position of global leadership.

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