

United States Information Technology Report Q2 2015

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Abstracts

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BMI View: The outlook for US IT spending remains strong when compared to the majority of developed markets over the medium term, as a result of stronger economic performance and a greater interest from enterprises in the latest products and solutions. Cloud computing, real-time enterprise software, security and big data are all areas of spending in which we expect to see strong growth, particularly in the latter years of our forecast. The retail hardware outlook is more mixed, as we expect continued demand growth for tablets in the retail market; however, desktop and notebook sales continue to be squeezed. Total spending is expected to reach USD681bn in 2015, up 4.8% from 2014, and grow at a CAGR of 3.4% 2015-2019.

Headline Expenditure Projections

Computer Hardware Sales: USD216bn in 2014 to USD223bn in 2015, an increase of 3.0%. Tablet volumes set to decline, but at a slower rate than 2014, while traditional form factors are expected to continue gaining ground after steep declines in 2012 and 2013.

Software Sales: USD181bn in 2014 to USD191bn in 2015, an increase of 5.2%. Enterprise software-as-a-service adoption has strong momentum, while demand for cyber security solutions is also an area of growth.

IT Services Sales: USD252bn in 2014 to USD267bn in 2015, an increase of 6.1%. Cloud computing adoption is already high in the US but we expect strong growth to continue over the medium term despite security concerns following on from the NAS Prism debacle.

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