

United States Information Technology Report Q4 2015

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Abstracts

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BMI View: We made a minor adjustment to our IT market forecast for the US in the Q415, raising the growth rate forecast for the latter years of our medium term outlook. This has strengthened our view for the US IT market to outperform versus other 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. 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. Total spending is expected to reach USD677.6bn in 2015, and grow at a CAGR of 4.3% 2015-2019.

Headline Expenditure Projections:

Computer Hardware Sales: USD216.3bn in 2014 to USD221.8bn in 2015, an increase of 2.6%. 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.

Contents

BMI Industry View

SWOT

IT SWOT

Political

Economic

Operational Risk

Industry Forecast

Table: IT Industry - Historical Data And Forecasts (United States 2012-2019)

Macroeconomic Forecasts

Economic Analysis

Table: US - Key Economic Indicators

Table: US - Private Consumption Forecasts

Table: US - Private Investment Forecasts

Table: US - Government Consumption And Investment Forecasts

Table: US - Net Exports Forecasts

Industry Risk Reward Index

Table: Americas IT Risk/Reward Index, Q415

Market Overview

Hardware

Software

Cloud Computing

Table: Cloud Vendor Developments, 2015

Services

Industry Trends And Developments

Regulatory Development

Table: IT Regulatory Authorities

Competitive Landscape

Local Companies

Table: CA Technologies

Table: EMC Corporation

Table: Splunk

Table: Symantec

Regional Overview

Americas

Demographic Forecast

Table: Population Headline Indicators (United States 1990-2025)

Table: Key Population Ratios (United States 1990-2025)

Table: Urban/Rural Population & Life Expectancy (United States 1990-2025)

Table: Population By Age Group (United States 1990-2025)

Table: Population By Age Group % (United States 1990-2025)

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: IT Risk/Reward Index Indicators

Table: Weighting Of Components

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