AMI

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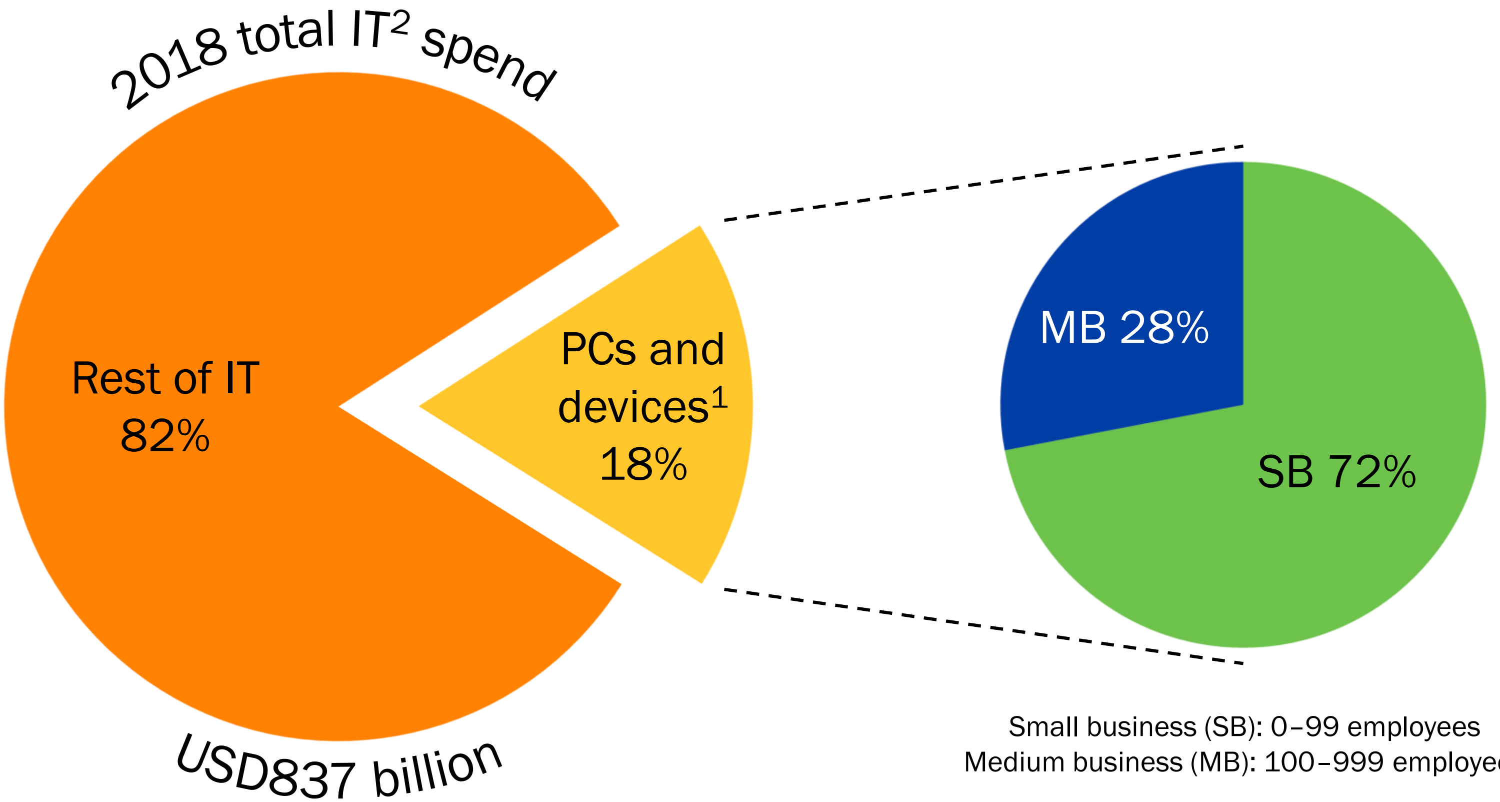
PCs and devices: SMB market overview and opportunities reports

Understanding how SMBs purchase and maintain their IT solutions will provide vendors with a greater potential revenue share

IT spending on PCs and devices[1] is USD148 billion (18% of the total IT spending); this is projected to rise to USD171 billion by 2021.



Small business (SB): 0–99 employees
Medium business (MB): 100–999 employees

Source: AMI-Partners

[1] PCs and devices includes desktops, notebooks, 2-in-1s, smartphones and tablets, servers and devices-as-a-service (DaaS).
[2] IT spending excludes spending on communications, IoT and digital marketing.

The reports will provide global insights into SMB device usage, buying behaviors and brand preferences, including shifts in spending to subscription-based models

PCs and devices study overview

- These reports have been conducted in leading countries across the Americas, Europe and Asia–Pacific; these are regions that drive a significant amount of the spending on PCs and mobile devices.
- In particular, 12 key countries (Australia, Brazil, Canada, China, France, Germany, India, Japan, New Zealand, Sweden, the UK and the USA) are responsible for the majority of the worldwide spending on PCs and mobile devices. These countries account for 66% of the total spending.
- These reports provide an in-depth market perspective into SMBs' adoption of the following computing devices: desktops, all-in-ones, notebooks, 2-in-1s, tablets, smartphones and servers, as well as devices-as-a-service.
- These reports also include an examination of:

Key purchase drivers	Purchase channels
Brand preference	Budgets/spending
Applications deployed	Feature preferences
Add-on services/bundles	Form factors by user type
Device lifecycle	Purchase journeys
Buying behavior	Influencers/decision makers

Key questions answered

- What is the total SMB market opportunity for computing devices?
- How does device preference and usage vary by business role?
- What types of software applications are SMBs running on their PCs/devices?
- What is triggering SMB PC and mobile device acquisitions?
- What is the importance of feature sets and form factors in PC and device purchase decisions?
- Who are the SMB decision makers and how are they reached?
- Which purchase channels do SMBs use to buy PCs and mobile devices?
- How is the device-as-a-service (DaaS) market growing?

The reports are based on the primary research of 2750 SMBs worldwide, and covers decision making, brand criteria, perception and purchasing behavior and channels

Questionnaire overview

PC usage and plans: brand, employee usage, bundled apps and selection criteria.

Tablet usage: current and planned usage, brands, satisfaction, policies, selection criteria and purchase channels.

Smartphone usage: current versus planned use; includes brand, satisfaction, policies, key features and channels.

Server usage: current versus planned usage, form factors, brands and spending.

Device-as-a-service usage: usage, drivers, brands, spending and providers.

App usage: current and planned app type and access device used.

Mobile policies: bring your own device and reimbursement policies, service and support plans and an overview of data plans.

Business challenges: strategic IT issues, the likelihood of cloud migration, process decision makers and influencers.

Firmographics: overview of business characteristics.

Areas covered

Geographical
- Americas (BR, CA, US)
- Europe (FR, GE, SWD, UK)
- APAC (AU, CH, IN, JP, NZ)

SMB segments
- <9 employees
- 10–49 employees
- 50–249 employees
- 250–999 employees

PC/device type
- Desktops
- Notebooks
- All-in-ones
- Workstations
- Two-in-ones
- Tablets
- Smartphones
- Servers

Key benefits of the reports: monetizing the opportunity

Market opportunity and growth

Market sizing and growth by country, form factors, and business sizes.

Customer engagement

Enabling vendors to provide decision makers with the right message at the right time.

Optimizing the offer

Align product feature sets and value-added software/services with customer preferences.

Device-as-a-service (DaaS) model

Understanding buyer motivations and preferences for the emerging device-as-a-service model.

Reports available

Reports	2017 reports	2019 small businesses (SB)	2019 small and medium businesses (SMB)
Worldwide PC and devices	✓	✓	✓
Brazil		✓	CR
Canada		✓	CR
USA	✓	✓	CR
France		✓	CR
Germany	✓	✓	CR
Sweden		✓	CR
UK	✓	✓	CR
Australia/New Zealand		✓	CR
China	✓	✓	CR
India	✓	✓	CR
Japan	✓	✓	CR

KEY

✓: report available

CR: available as a customised report

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About AMI-Partners

An Analysys Mason company

AMI-Partners is a global ICT research and consulting firm that focuses on the small and medium business (SMB) market.

- AMI-Partners was founded in 1996 and has over 20 years of expertise in the SMB ICT market. It was acquired by Analysys Mason in July 2018.
- Specialisms include:
  - go-to-market opportunity assessment
  - tracking buying behaviour
  - customer segmentation
  - channel partner ecosystem dynamics
  - sales enablement.
- AMI-Partners has invested over USD50million in primary SMB research to date, thereby setting a global benchmark.

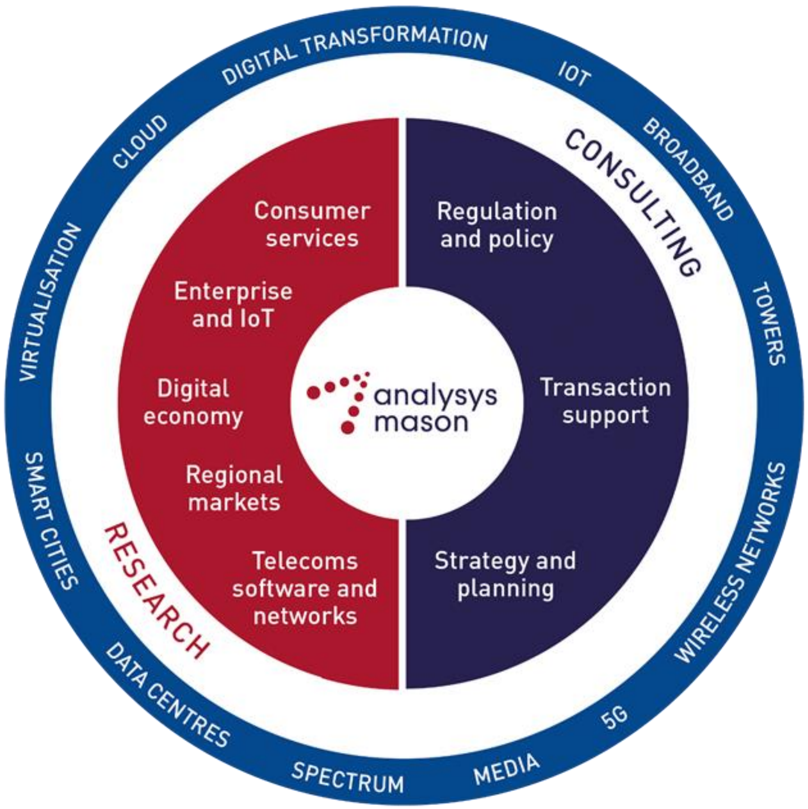
The Analysys Mason ICT Global Model

75 million+ data points

- **130+** ICT business categories
- **52** Countries and **5** 'rest-of-region' areas
- **19** Industry verticals
- **13** Business sizes
- **8** Routes to market

Analysys Mason's consulting and research are uniquely positioned

Analysys Mason's consulting services and research portfolio



CONSULTING

We deliver tangible benefits to clients across the telecoms industry:

communications and digital service providers, vendors, financial and strategic investors, private equity and infrastructure funds, governments, regulators, broadcasters, and service and content providers.

Our sector specialists understand the distinct local challenges facing clients, in addition to the wider effects of global forces.

We are future-focused and help clients understand the challenges and opportunities that new technology brings.

RESEARCH

Our dedicated team of analysts track and forecast the different services accessed by consumers and enterprises.

We offer detailed insight into the software, infrastructure and technology delivering those services.

Clients benefit from regular and timely intelligence, and direct access to analysts.

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