Daniel Research Group
Understanding the Future

United States Personal Device Market Size History and Forecast, 1975-2030 May 2026 Update

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Our Approach

The Daniel Research Group's EquilibriumSolver (EQS) is a forecasting methodology and application that utilizes a combination of long-term market trends, current unit shipments and revenue data, and analyst assessments of influencing economic, demographic, and market factors. The purpose of the **EQS** is to generate forecasts that are highly predictive by incorporating both mathematical calculations and insights from external sources.

The **EQS** algorithm considers variables such as Total Available Market (TAM), Penetration, Density, and Replacement Rate trends, as well as actual reported year-to-date data on unit shipments and revenue. Additionally, it incorporates the insights and expertise of our analysts regarding the magnitude and direction of major causal factors influencing the market.

By leveraging this comprehensive set of inputs, the **EQS** algorithm calculates forecasts for key variables and metrics. The algorithm aims to converge on the most likely forecast for each variable based on the provided input data and parameters. The resulting forecasts are expected to be both mathematically consistent and aligned with the narrative developed from external data, information, and analysts' knowledge and insights.

In summary, the core algorithm of the **Daniel Research Group's EquilibriumSolver** is designed to generate highly predictive forecasts by considering a wide range of factors and data, resulting in forecasts that are mathematically sound and consistent with the overall market narrative.

The core **EQS** algorithm forecasts **Unit Shipments** and the **Installed Base** as a function of four input variables.

1. **Total Available Market**– Number of Households or Businesses in the US economy.

2. **Penetration Rate** – What Percent of those Households or Businesses that own and use one or more of the devices.

3. **Density** – For Households or Businesses that own one or more of the devices, how many.

4. **Replacement Rate** – How long will a Households or Businesses use the device before ending use and replacing it.

The Forecasting Challenge

A plethora of causal factors will influence the demand for consumer electronic products this year and over the next five years:

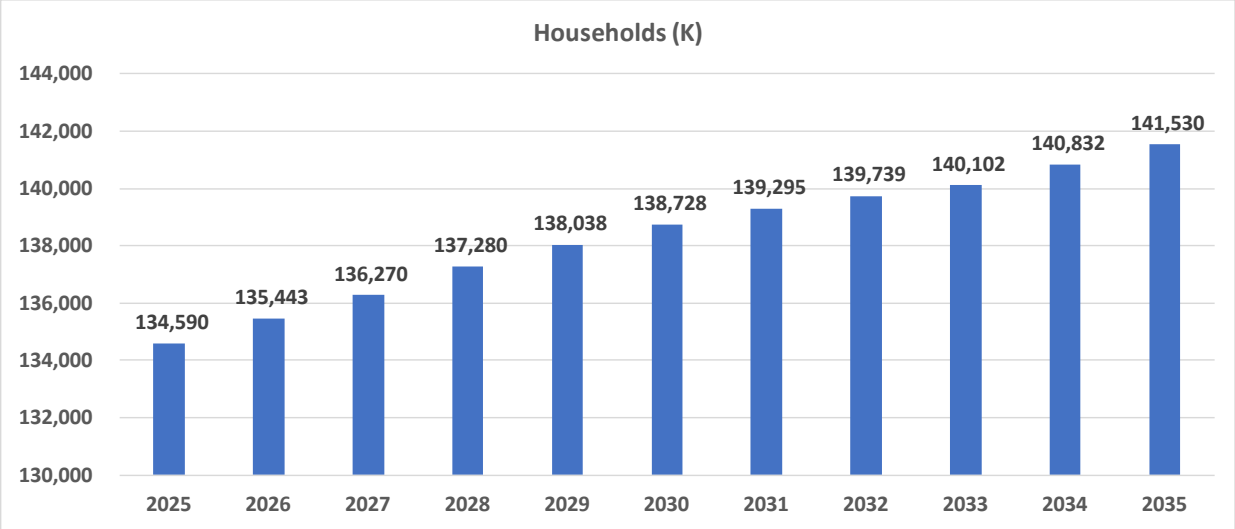
The Aging Work Force
Deportations
Immigration
Chip Shortages
Tariffs
Inflation
The US-Iran War
AI Job Losses and Creations
AI New Use Cases
The End of Win10 to 11 Migration
Post Pandemic Trends – Inertia in the Market

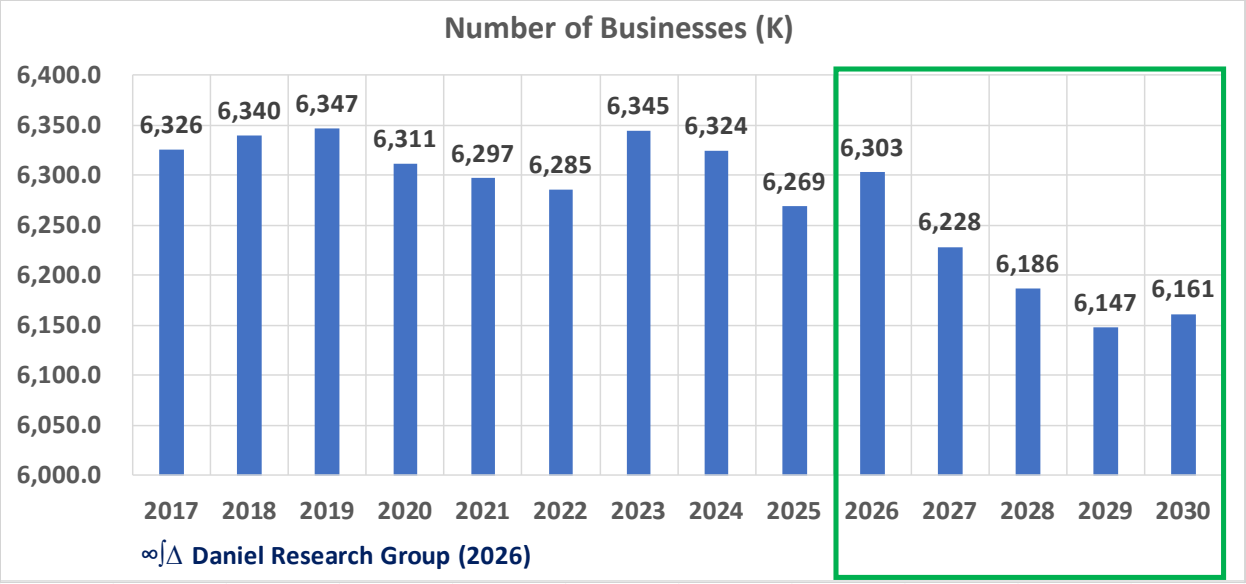
Sorting out how each of these causal factor influences each of the market demand variables is the challenge at the moment.

The EQS Market Forecast Model Variables

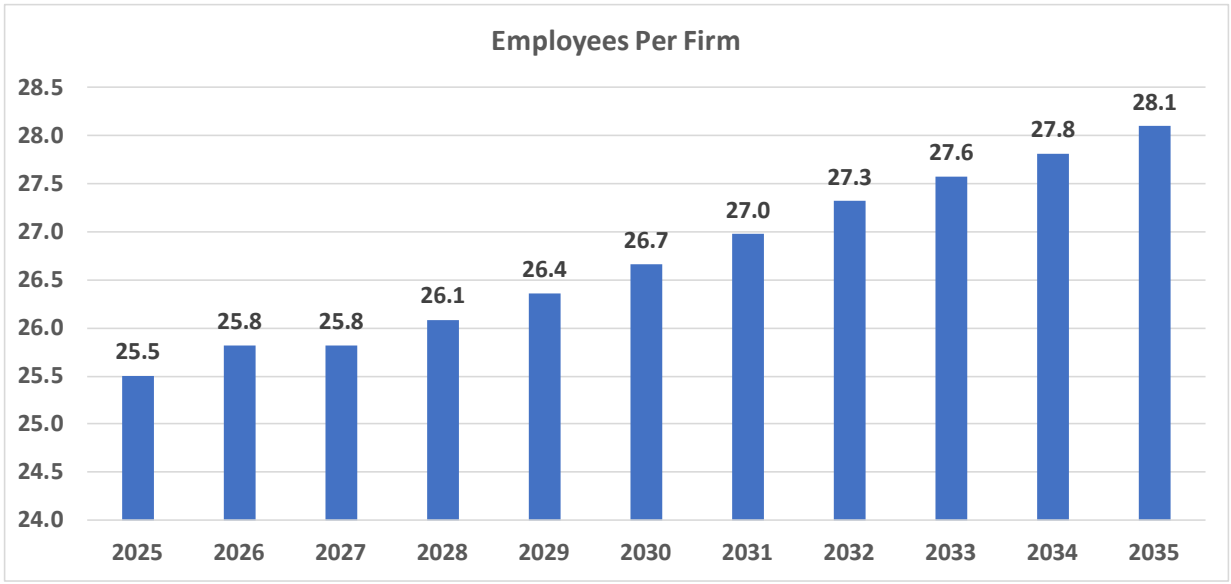
Total Available Market (TAM)

TAM provides a certain degree of inertia in the market in that it exhibits the least variance over time. While the number of occupied households will grow at an annual rate of 0.5% over the next 10 years increasing the Consumer TAM and Demand, the number of businesses will significantly decrease negatively impacting Enterprise TAM and Demand.





The number of businesses is a function of the number of employees and the employee-per business ratio. While the number of employees in projected to show slight overall growth, business consolidation will increase the average size of business and reduce the number of business.



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US Economy Structural Changes		
Sector	(All)	
Sub-Sector	(All)	
Size Code	Total	
Size Class	(All)	
Metric	Primary Firms	
Industry	2025 to 2030	CAGR
Forestry, Fishing, Hunting, Agriculture	-11,558	-0.8%
Mining	1,266	1.2%
Utilities	541	1.8%
Construction	-19,997	-0.5%
Manufacturing	-11,447	-1.0%
Wholesale	-11,991	-1.0%
Retail	-11,837	-0.4%
Transportation, Warehousing	-18,641	-2.2%
Information	4,986	1.6%
Finance, Insurance	-10,443	-1.0%
Real Estate, Rental, Leasing	2,328	0.1%
Professional, Scientific, Technical Services	-44,508	-1.1%
Management of Companies, Enterprises	258	0.9%
Administrative Support, Waste Management, Remediation Services	-16,934	-1.7%
Education	3,292	0.5%
Health Care, Social Assistance	-25,401	-0.7%
Arts, Entertainment, Recreation	13,310	1.6%
Accommodation, Food Services	31,019	1.1%
Other Services	17,897	0.5%
Public Administration	163	1.5%
National Defense	-9	-2.2%
Total	-107,706	-0.3%
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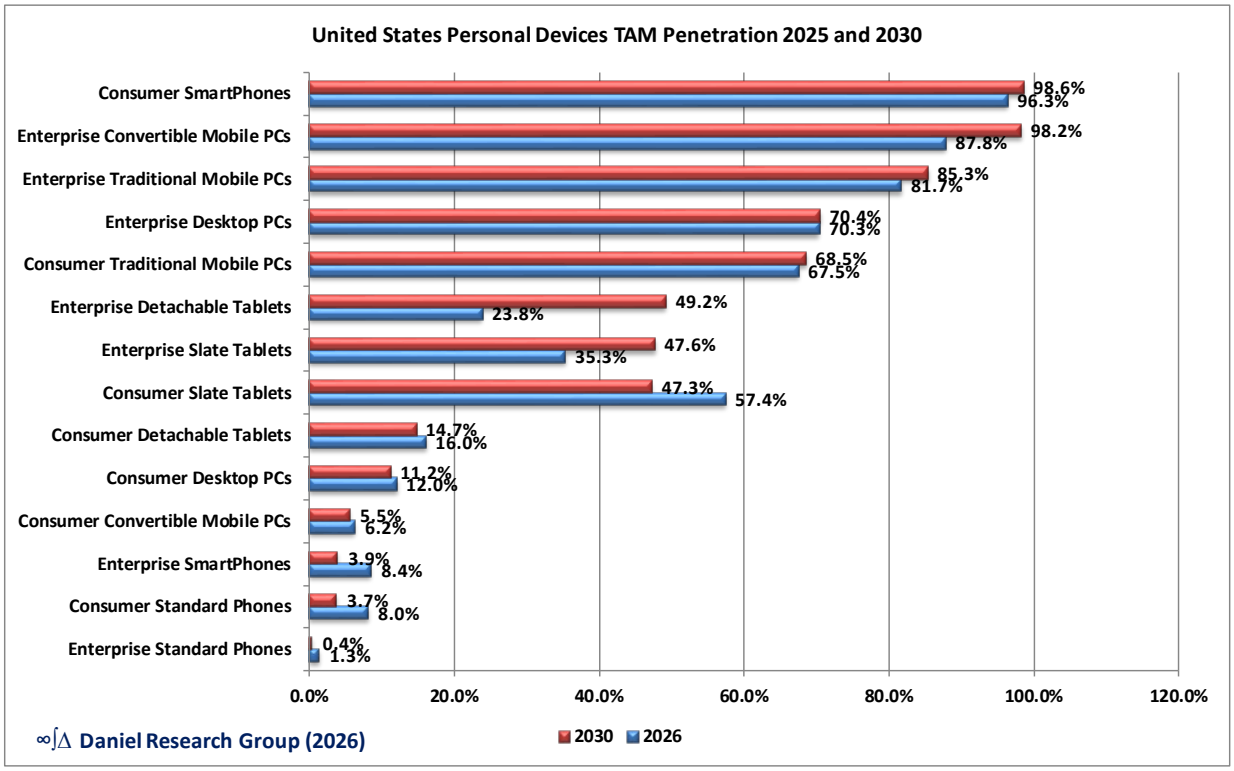
∞∫Δ Daniel Research Group © (2026)		

A decrease in the projected number of employees will further decrease the number of business. Factors that will influence employment growth are; (1) deportations and immigration, (2) the rate of the work force retirement rate, and (3) AI job destruction and creation.

The net structural pressure on TAM is modestly negative across all products and sectors over the forecast period. Immigration and AI-driven use case expansion provide partial offsets but do not fully counter the headcount reductions from deportation and AI displacement. For most causal factors, TAM is not the primary mechanism — it is the background condition against which penetration, density, and replacement cycle dynamics play out.

Penetration

Penetration operates on the TAM and represents new households or business purchasing for the first time, or ending use and/or ownership of the device. Depending on the Product, Form-Factor, and Segment, Penetration may be increasing, decreasing, or even changing direction. Theoretically, penetration rates should follow the Diffusion of Innovation S-Shaped curve. However, in most cases there are deviations where the actual curve accelerates, flattens, or even declines from its expected path, sometimes even returning to the expected path later.

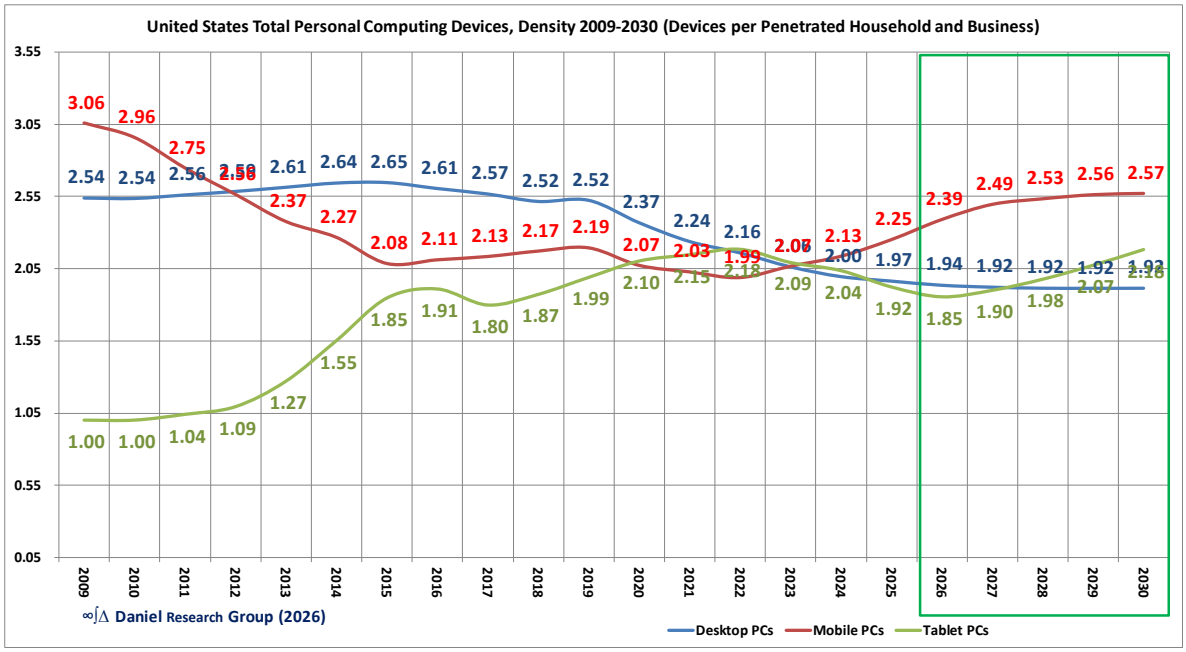


Chip Shortages, Tariffs, and Inflation acting on prices negatively influence the rate of penetration growth while the emergence of new AI enabled use cases increases the penetration rate,

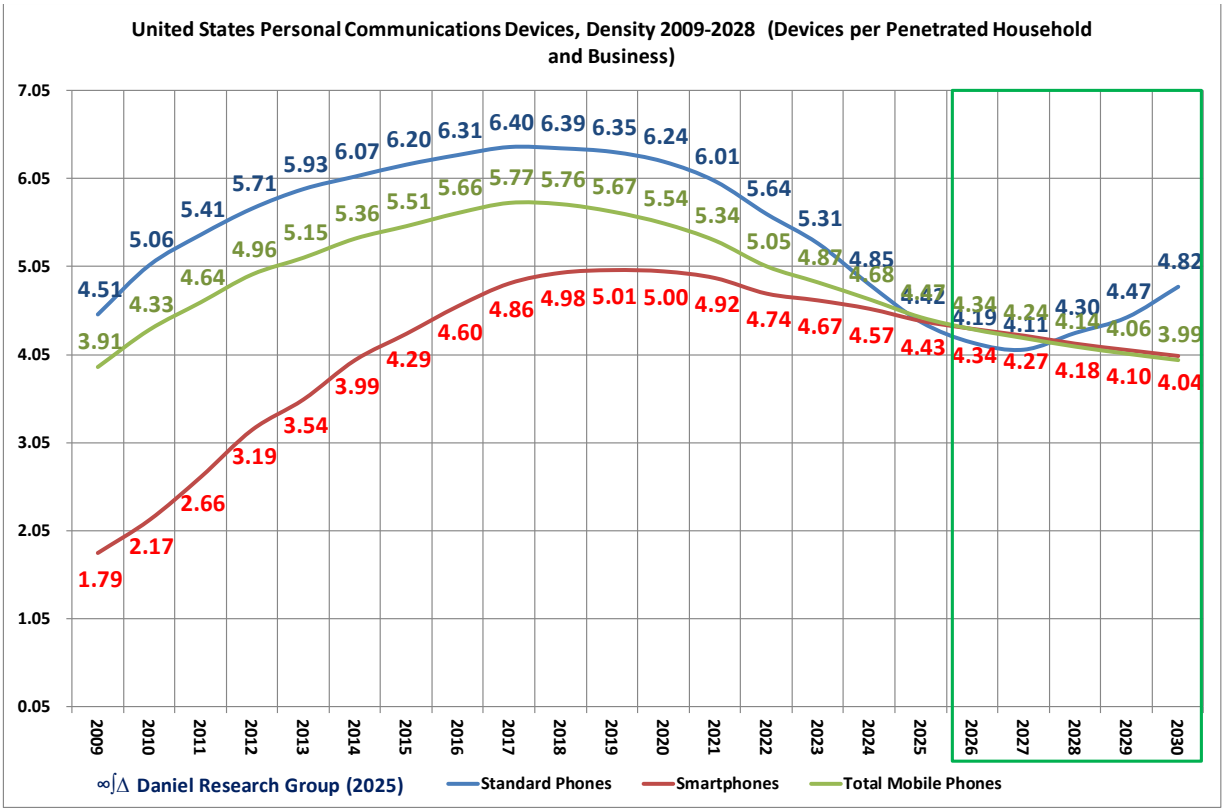
Density

Density is the average number of Installed Base units in penetrated households and/or businesses. Densities are independent of penetration and reflect the distribution of single or multiple product users over the life of the product and the timing of the purchase of additional units. For most products, early adopters are more likely to be multiple-unit buyers than later adopters. As the product enters the middle phase of its market life, the density will begin to decrease as later buyer are less likely to be multiple-unit buyer/users. For some products the density will start to increase again at the very end of the product life as the few remaining users are more likely to be multiple unit users than those who have stopped using the product.

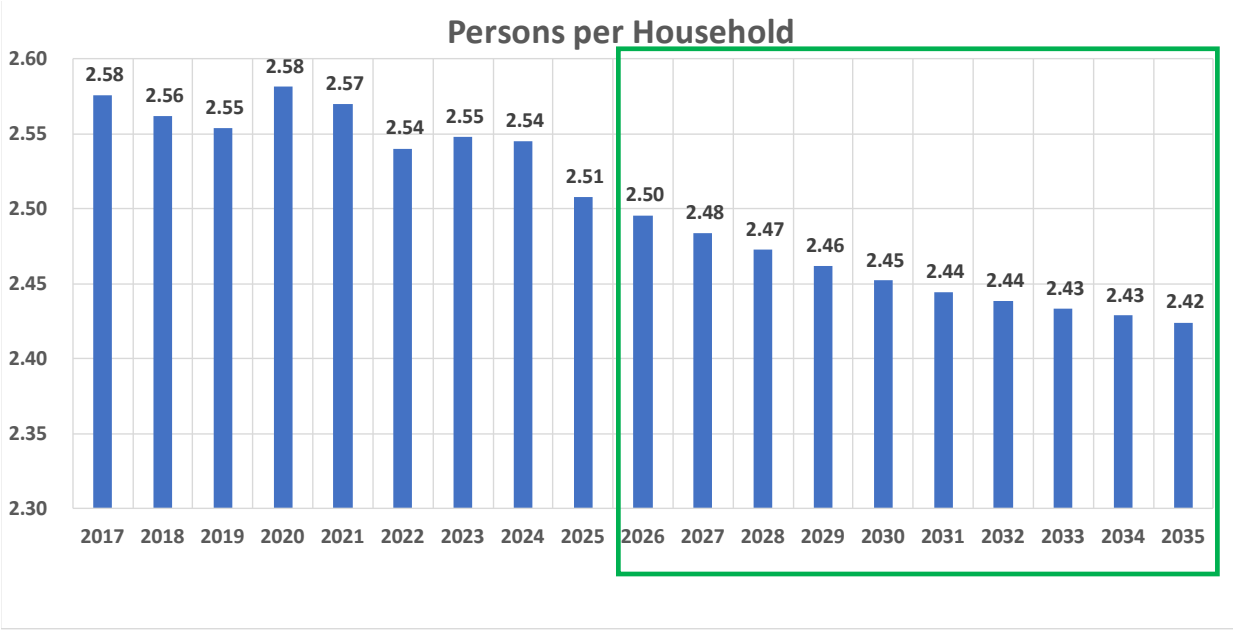
Computing Devices



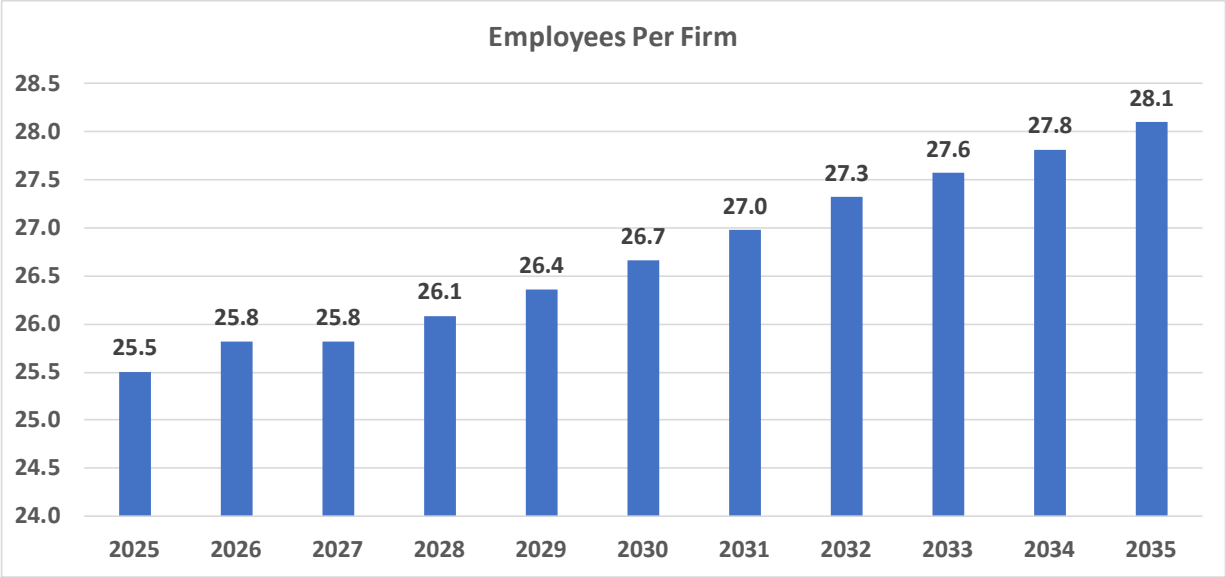
Mobile Phones



Densities at the Product/Form Factor/Segment level are related to the average number of employees in a business or the size of the household,



Smaller household size due to demographic, deportation and immigration trends will act to reduce household densities for some Product/Form Factor cases. Additionally, post Pandemic/Recovery normalization will shift work from home device demand from the household to the business. As will reduced demand for Education at Home.



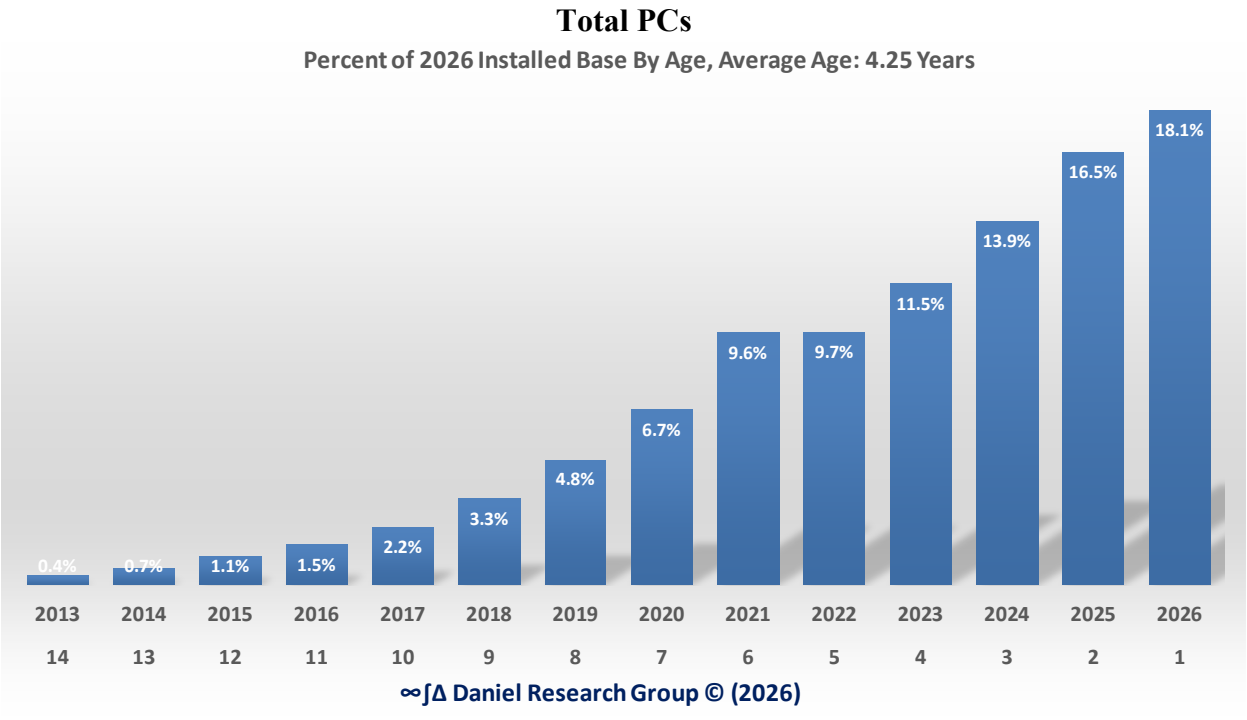
AI will be a net positive influence on Enterprise Densities as the demand to support new use cases will exceed loss due to employment reductions.

Replacement Rates

How long are current users expected to continue to use their current device until they replace them? That is one of the most important questions that device vendors and sellers need to ask, and is very difficult to answer. Asking current users when they expect to replace requires them to have knowledge of future product, economic and market conditions that they may not know. The **EQS** methodology and models utilize four different metrics to measure historical and forecasted length of time a device is in use before being removed from the Installed Base.

Retention Rate Distribution Mean (**RRD-μ**), Standard Deviation and Maximum Life. Given the number of Units Shipped in any year, the RRD-μ is the number of years from the current year when 50% of those Units will still be in the Installed Base. The distribution is assumed to be a left (1) and right (Maximum Life) truncated normal distribution with a specified standard deviation.

Average Installed Base Age (AIBA). The **EQS** models compute the age distribution of the Installed Base in every year. However, AIBA is often highly dependent on the relative magnitude of current Unit Shipments in relationship to the Installed Base, and is therefore not always an accurate estimate f how long users will continue to use the device when either Unit Shipments or Removals exhibit high year to year variance.



Replacement Cycle Length (RCL)

$$RCL = \frac{Starting\ Installed\ Base\ + Unit\ Shipments}{Units\ Exiting\ the\ Insalled\ Base}$$

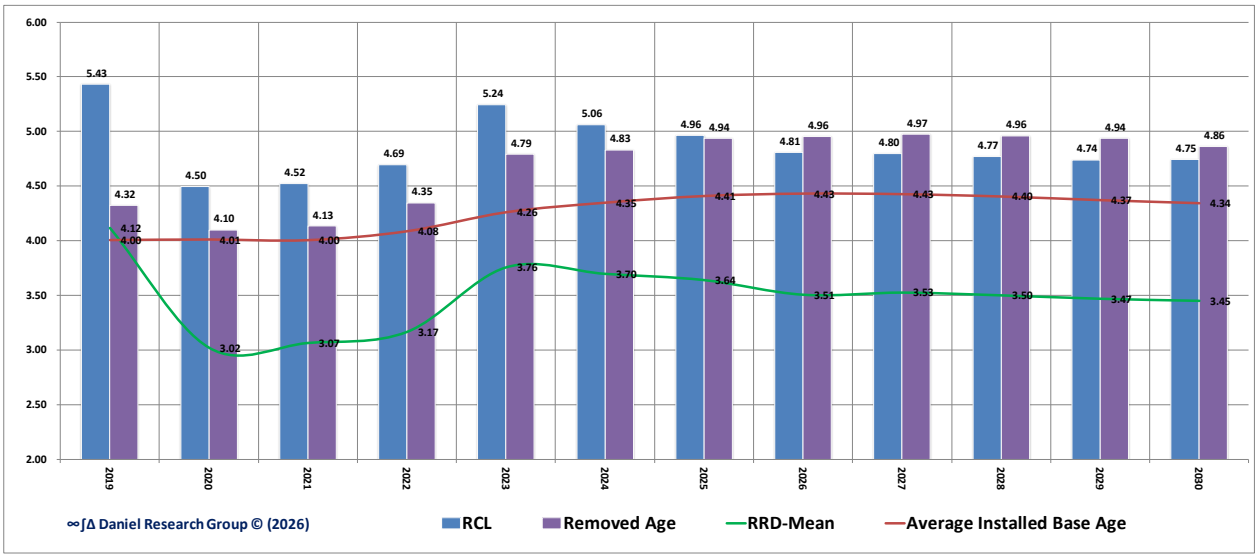
RCL is the length of time it will take for all the existing units in the Installed Base to be replaced given the current Installed Base size, Unit Shipments, and number of Units Removed from the Installed Base in that year. Under normal conditions, RCL is the favored metric for predicting the length of use/ownership trends of Personal Devices. However, like the AIBA metric, its predictive properties diminish when the variance of the Unit Shipments or Removed Units exiting the Installed Base increases

Average Removal Age (ARA) – is the average age of the units exiting the Installed Base for any reason. It is an estimate of the average age that would be computed if you could ask every user who stopped using the device how long they had used it before replacing or other reasons for use termination. The **EQS** Model computes number of units exiting the installe base as a function of its installed base age. This age metric is least affected by Unit Shipments year to year variance,

The value of each of these metrics lies more in the trend than in the point values. A comparison of the four Installed Base age metrics for Total Computing Devices is presented in this chart. The RCL and RRD-Mean will exhibit the most variance due to anomalous events

such as the introduction of new products, operating system migration and economic shocks. Therefore, currently the Average Installed Base Age and the Average Removal Age are the preferred estimates of future replacement rates.

Total PCs and Tablets

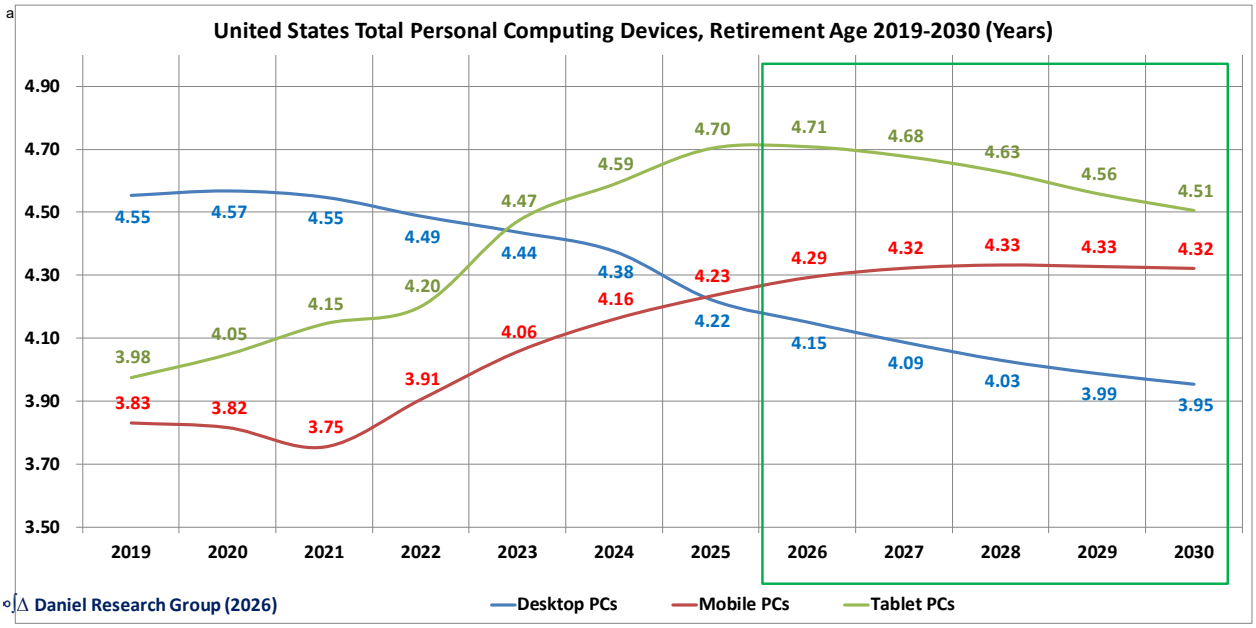


Each of the Age metrics answers a different question.

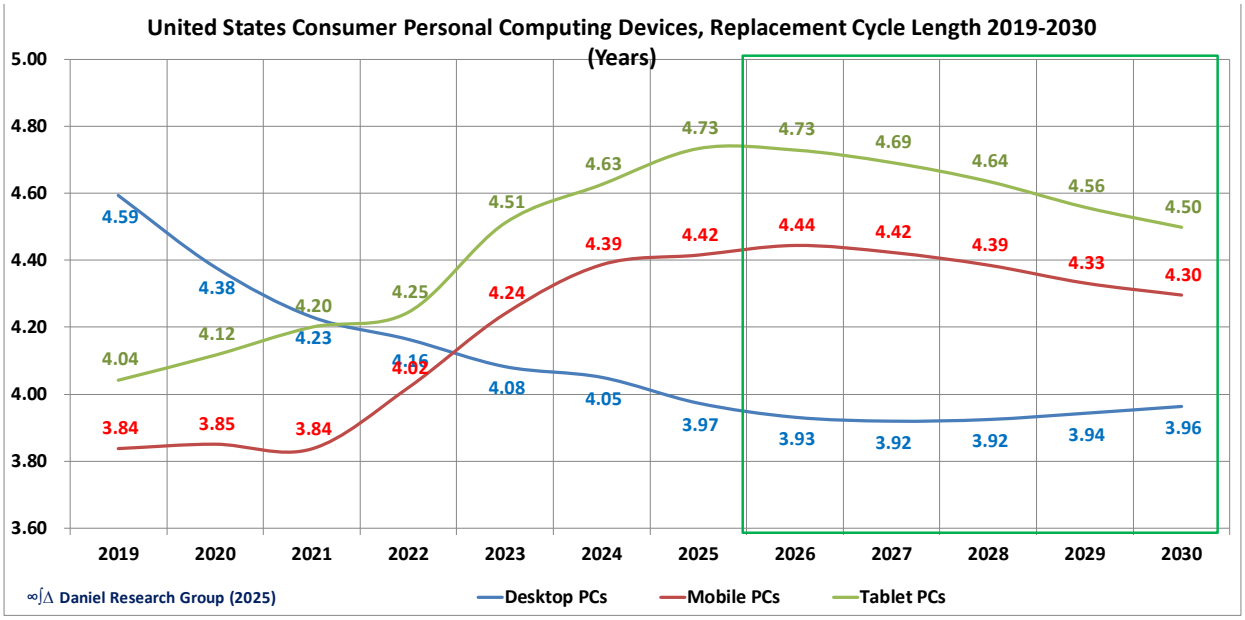
Metric	Question
AIBA	How old are the units in the Installed Base?
ARA	How old are the unit's people are just now no longer using.
RRD-μ	How much time from now will 50% of this year's Unit Shipments still be in use?
RCL	How long will it take to replace all the units in the Installed Base?

Average Retirement Age

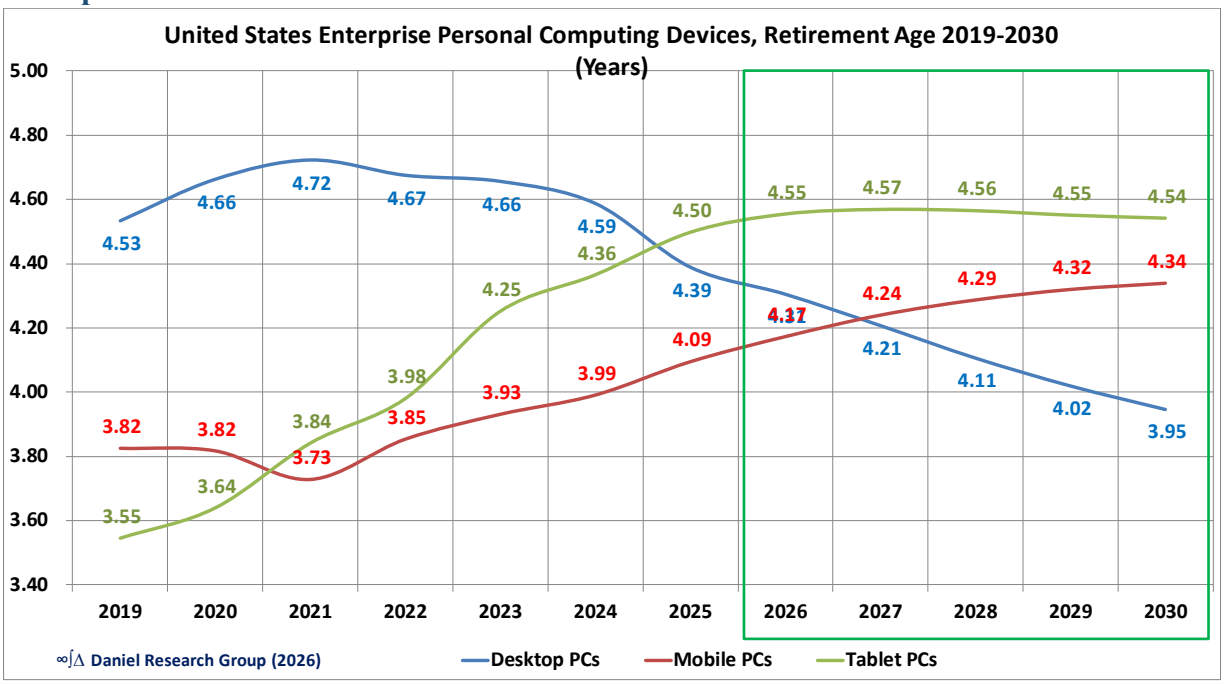
Total



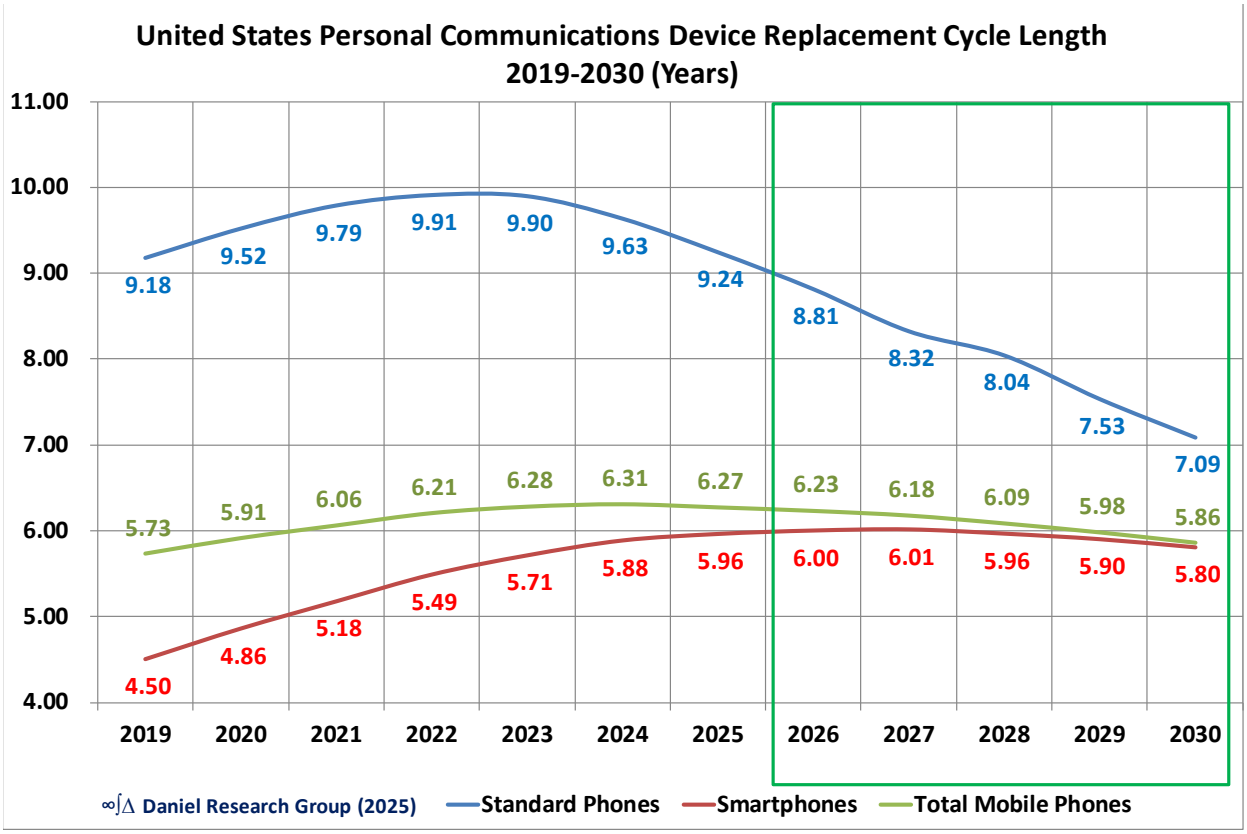
Consumer



Enterprise



Mobile Phones



Consumer Electronics Replacement Rate Drivers

Users replace devices for four different reasons:

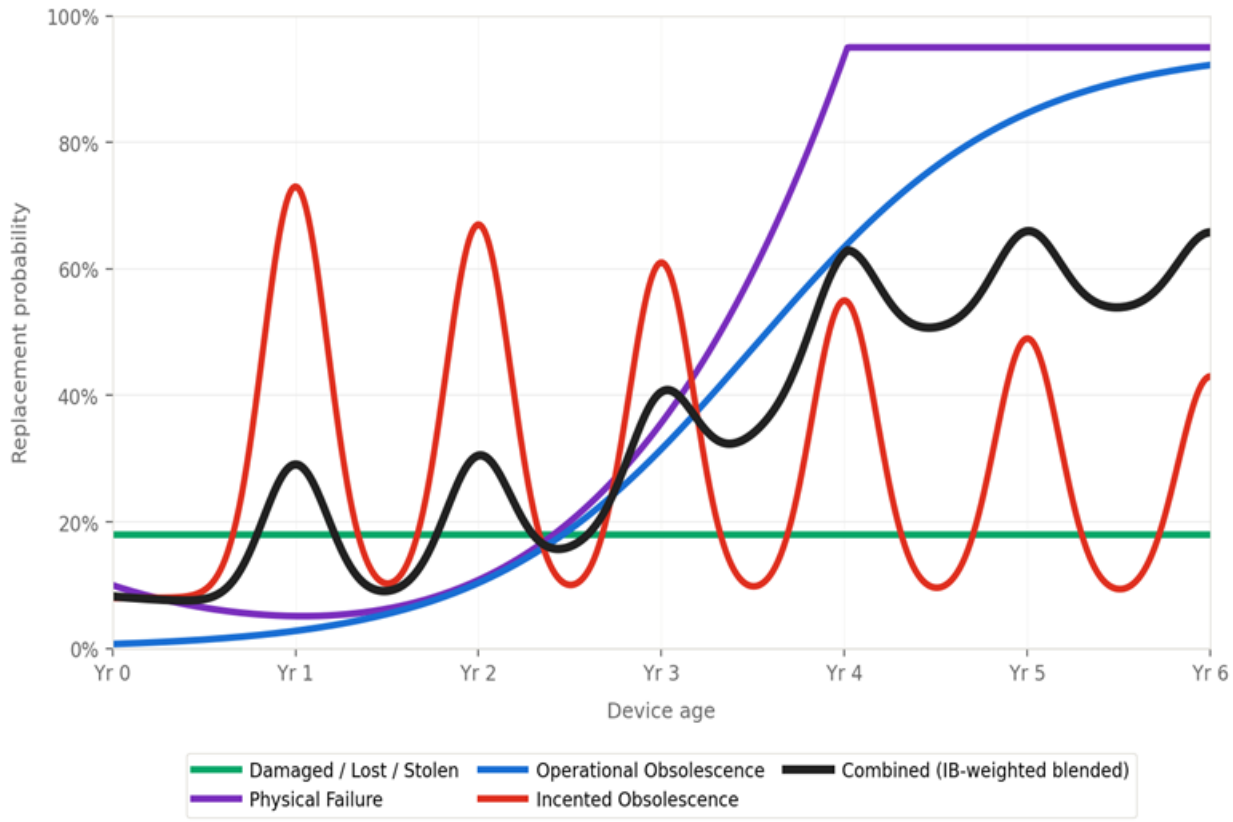
- **Damaged beyond repair, lost, or stolen,** The probability is constant over time,
- **Physical Failure,** bath tub like probability. Initial DOA with low incidents for most for the life, then rapid acceleration at end of life,
- **Operational Obsolescence**, cannot support current or future use case. Increasing Logistics curve.
- **Incentivized Obsolescence**, a compelling reason to buy new product even if it meets current needs. Driven by new product introductions, end of support, and marketing.

The reasons vary depending on the product.

Consumer Electronics Replacement Rate Drivers

Driver	Desktop PC	Mobile PC	Tablet	Smartphone	IB-Wtd Blend
Damaged / lost / stolen Irreparable damage, theft, loss	5%	12%	8%	18%	**14.4%**
Physical failure Hardware fails; includes battery degradation and repair economics	25%	31%	32%	26%	**28.1%**
Operational obsolescence Can't support current or future use case; includes ecosystem lock-out	52%	34%	28%	17%	**24.0%**
Incented obsolescence Reason to buy new even if existing meets needs; includes desired and life events	18%	23%	32%	39%	**33.4%**
Total	**100%**	**100%**	**100%**	**100%**	**100%**
IB-Weighted Blended 2026 installed base weights	**4.0%**	**21.9%**	**17.3%**	**56.8%**	**100%**

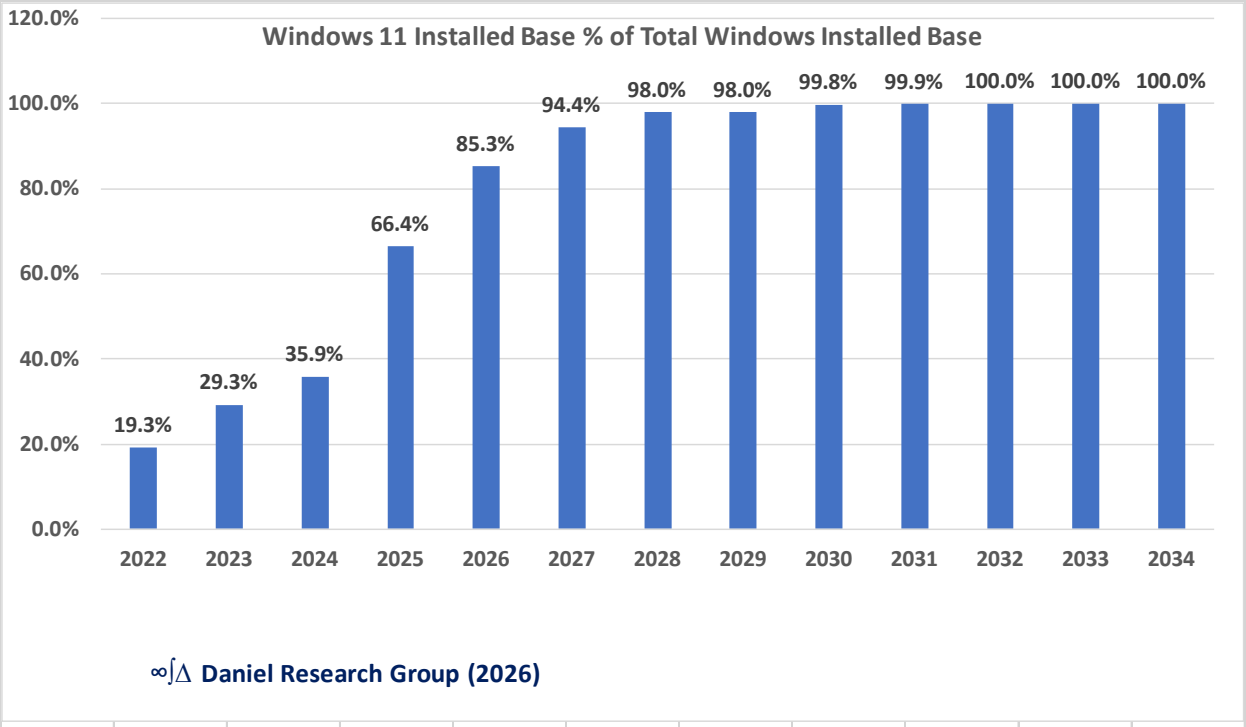
IB-Wtd Blend = installed base weighted average using 2026 US ending installed base. IB shares: Desktop PC 4.0% · Mobile PC 21.9% · Tablet 17.3% · Smartphone 56.8%.



Windows 10 to 11 Migration

The end of support for Windows 10 is both an operational and incentivized obsolecence driver in the near-term. The final surge of users migration to Windows 11 that started in 2025 will end in 2027.

The most precisely timed factor in the model. Its effect is heavily concentrated in 2025–2026, acts almost exclusively through the replacement cycle for PCs, and has zero effect on tablets or smartphones. It is the only factor in the model that forces a purchase decision on a fixed schedule — the October 2026 ESU deadline is a genuine hard backstop for commercial organizations that have not completed migration. This makes Win10→11 the most predictable and plannable factor in the forecast, and the primary reason why mobile PC commercial demand in 2026 is not as negative as the chip shortage and tariff headwinds alone would imply. From 2027 onward its signal approaches zero.


Windows 11 Installed Base % of Total Windows Installed Base
120.0%
100.0%
80.0%
60.0%
40.0%
20.0%
0.0%
19.3%
29.3%
35.9%
66.4%
85.3%
94.4%
98.0%
98.0%
99.8%
99.9%
100.0%
100.0%
100.0%
2022
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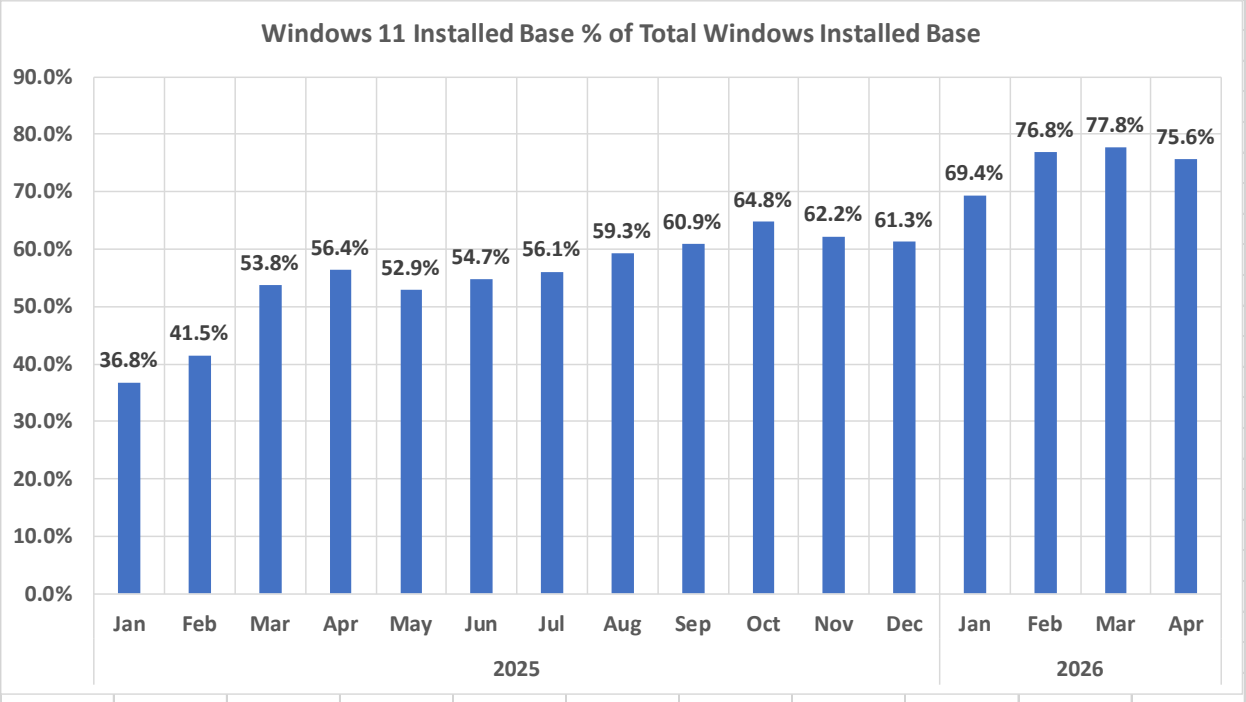
Windows 11 Installed Base % of Total Windows Installed Base
90.0%
80.0%
70.0%
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%
36.8%
41.5%
53.8%
56.4%
52.9%
54.7%
56.1%
59.3%
60.9%
64.8%
62.2%
61.3%
69.4%
76.8%
77.8%
75.6%
Jan
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Consumer & Enterprise WIN11 Total PCs								
	2025	2026	2027	2028	2029	2030	CAGR	Trend
Unit Shipments (K)	45,975	74,776	74,101	73,390	72,686	71,940	*9.4%*	
AGR	*93.6%*	*62.6%*	*-0.9%*	*-1.0%*	*-1.0%*	*-1.0%*		
Revenue ($M)	46,190	90,252	92,127	93,989	94,960	95,875	*15.7%*	
AGR	*109.4%*	*95.4%*	*2.1%*	*2.0%*	*1.0%*	*1.0%*		
Average Price ($)	1,004.67	1,206.96	1,243.27	1,280.68	1,306.43	1,332.71	*5.8%*	
AGR	*8.2%*	*20.1%*	*3.0%*	*3.0%*	*2.0%*	*2.0%*		
Installed Base (K)	62,846	94,998	127,891	157,935	183,320	205,228	*26.7%*	
AGR	*78.8%*	*51.2%*	*34.6%*	*23.5%*	*16.1%*	*12.0%*		
Installed Base Age (Y)	1.84	2.01	2.25	2.53	2.82	3.09	*10.9%*	
AGR	*6.8%*	*9.1%*	*12.2%*	*12.5%*	*11.4%*	*9.6%*		
Replacement Cycle Length (Y)	4.44	3.23	4.10	4.64	4.88	5.10	*2.8%*	
AGR	*-5.3%*	*-27.3%*	*27.1%*	*13.2%*	*5.0%*	*4.6%*		
Removed Units Average Age (Y)	1.42	1.47	1.74	2.06	2.40	2.75		
AGR	*5.4%*	*3.2%*	*18.6%*	*18.3%*	*16.4%*	*14.8%*	*14.1%*	
Units per Households & Businesses (#)	1.00	1.00	1.00	1.12	1.30	1.42	*7.3%*	
AGR				*12.3%*	*15.5%*	*9.5%*		
	2025	2026	2027	2028	2029	2030	Change	Trend
Market Penetration (%)	*44.6%*	*67.0%*	*89.7%*	*98.0%*	*98.0%*	*99.8%*	*55.1%*	
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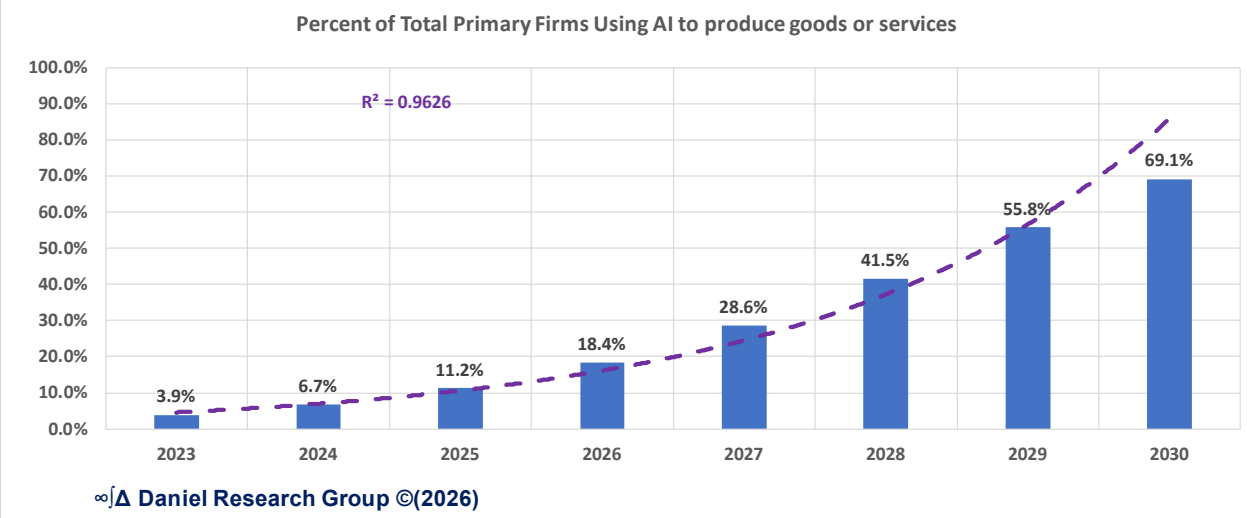
Artificial Intelligence

Drivers and Inhibitors

The single factor with the most positive net signal across the full market. It lifts penetration in both sectors across all four products, increases density particularly in commercial, and is the strongest replacement cycle shortener in the model. The mechanism changes in character across the forecast period: in 2026 it is primarily an upgrade-pull story (AI-PCs, AI phones); by 2028–2030 it becomes a structural density expansion story as enterprises deploy local AI inference, multi-device AI workflows, and rugged AI field devices. No other factor in the model exerts positive pressure on all four demand variables simultaneously.

However, there are headwinds that may slow the adoption rate across segments and industries. Notably the increasing cost of developing, distributing, and implementing agents and applications that produce positive return on investments. Additional concerns about the environment, energy costs, privacy, security, trust, and job losses may prompt government-imposed constraints.



Percent of Primary Firm Planning on Using AI to Produce Goods or Services								
Industry	2023	2024	2025	2026	2027	2028	2029	2030
Forestry, Fishing, Hunting, Agriculture	2.2%	3.4%	5.2%	7.9%	11.7%	17.1%	24.2%	33.1%
Mining	2.0%	3.4%	5.6%	9.1%	14.5%	22.3%	32.7%	45.1%
Utilities	4.1%	6.4%	9.8%	14.7%	21.6%	30.4%	41.0%	52.6%
Construction	1.1%	2.4%	5.1%	10.5%	20.4%	35.8%	54.8%	72.5%
Manufacturing	2.1%	3.9%	7.4%	13.5%	23.2%	37.1%	53.5%	69.1%
Wholesale	2.0%	4.1%	8.2%	15.6%	27.7%	44.3%	62.2%	77.3%
Retail	2.5%	4.4%	7.7%	13.1%	21.3%	32.7%	46.7%	61.2%
Transportation, Warehousing	1.3%	2.4%	4.4%	8.0%	14.1%	23.7%	37.1%	52.7%
Information	15.9%	22.3%	30.4%	40.0%	50.4%	60.7%	70.2%	78.2%
Finance, Insurance	5.6%	10.6%	19.1%	32.0%	48.5%	65.3%	79.0%	88.3%
Real Estate, Rental, Leasing	6.3%	10.1%	15.8%	23.9%	34.5%	46.9%	59.6%	71.2%
Professional, Scientific, Technical Services	10.5%	16.5%	25.1%	36.2%	49.0%	62.0%	73.4%	82.4%
Management of Companies, Enterprises	9.2%	14.5%	22.2%	32.3%	44.4%	57.3%	69.2%	79.0%
Administrative Support, Waste Management, Remediation Services	3.7%	6.4%	10.7%	17.4%	27.0%	39.4%	53.3%	66.7%
Education	7.0%	12.1%	20.1%	31.3%	45.4%	60.2%	73.4%	83.4%
Health Care, Social Assistance	4.0%	7.3%	12.9%	21.9%	34.7%	50.1%	65.6%	78.3%
Arts, Entertainment, Recreation	3.7%	6.5%	11.0%	18.2%	28.6%	41.9%	56.4%	70.0%
Accommodation, Food Services	1.2%	2.3%	4.3%	7.9%	14.0%	23.5%	36.8%	52.4%
Other Services	1.8%	3.3%	5.8%	10.0%	16.7%	26.6%	39.6%	54.2%
Total	3.9%	6.7%	11.2%	18.4%	28.6%	41.5%	55.8%	69.1%

Size Class	% using AI for Production 2026
250 or more employees	32.8%
Between 100 and 249 employees	26.5%
Between 50 and 99 employees	22.5%
Between 20 and 49 employees	19.5%
1 to 4 employees	18.8%
Between 5 and 9 employees	17.9%
Between 10 and 19 employees	17.8%

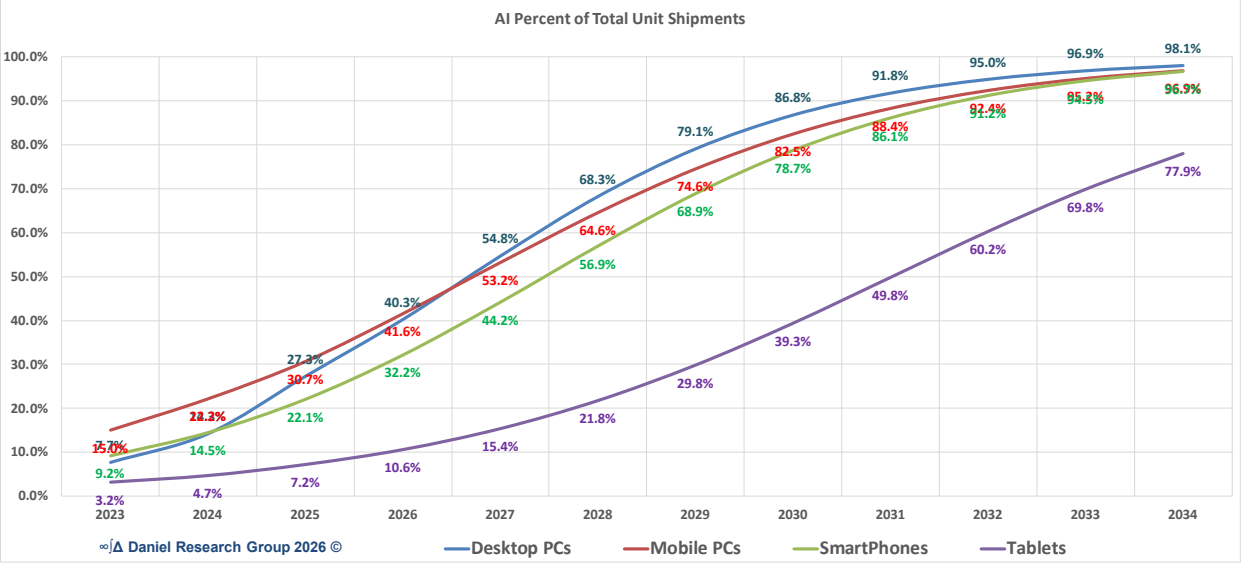
Size Class	% using AI for Production 2030
250 or more employees	89.3%
Between 100 and 249 employees	87.5%
Between 50 and 99 employees	84.0%
Between 20 and 49 employees	79.9%
Between 10 and 19 employees	72.2%
Between 5 and 9 employees	72.2%
1 to 4 employees	65.2%

Telos to Terminator - There may be a more subtle and ancient fear that may influence adoption. Few anxieties run deeper in our imagination than this one: that the thing we make will destroy us. It predates electricity, predates computing, and may predate writing. What's remarkable isn't that the story keeps being told — it's how consistently it keeps revealing the same terror underneath, no matter the era or the technology. Across 2,500 years of versions, a few things never change. And the thing we fear most is never really the machine. It's the mirror. The technology uprising is always, at bottom, a story about what we do with the things we make — and what that says about what we are.

AI Enabled Adoption

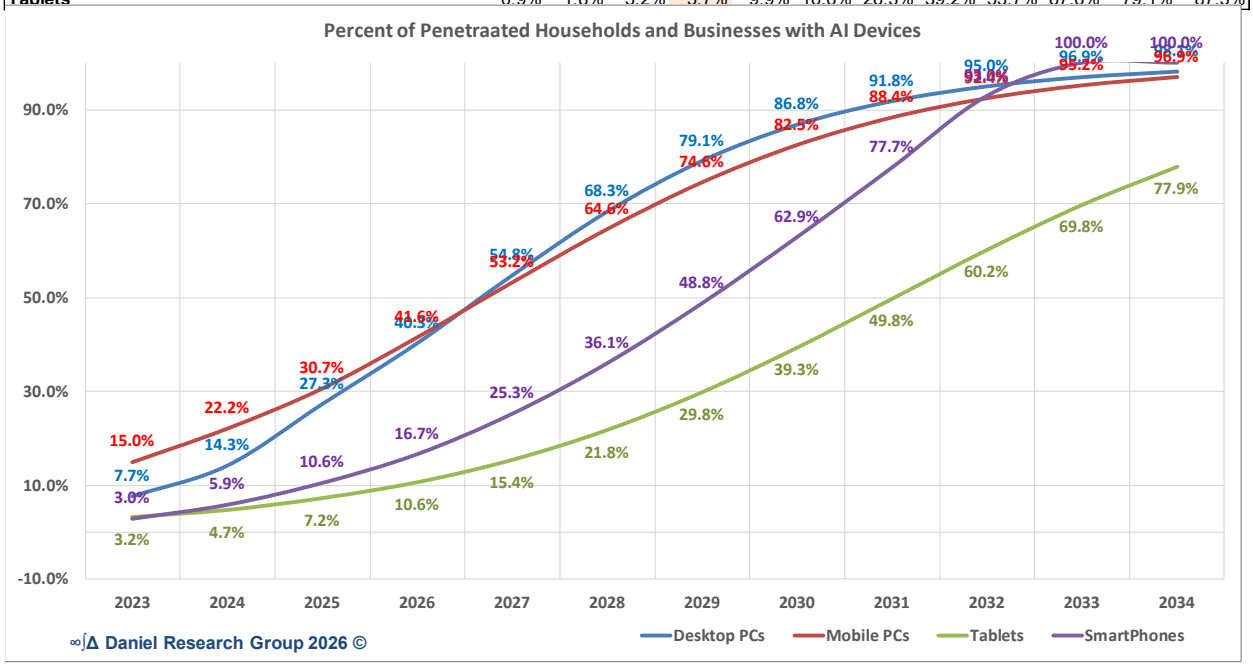
Percent of Unit Shipments

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Desktop PCs	7.7%	14.3%	27.3%	40.3%	54.8%	68.3%	79.1%	86.8%	91.8%	95.0%	96.9%	98.1%
Mobile PCs	15.0%	22.2%	30.7%	41.6%	53.2%	64.6%	74.6%	82.5%	88.4%	92.4%	95.2%	96.9%
SmartPhones	9.2%	14.5%	22.1%	32.2%	44.2%	56.9%	68.9%	78.7%	86.1%	91.2%	94.5%	96.7%
Tablets	3.2%	4.7%	7.2%	10.6%	15.4%	21.8%	29.8%	39.3%	49.8%	60.2%	69.8%	77.9%



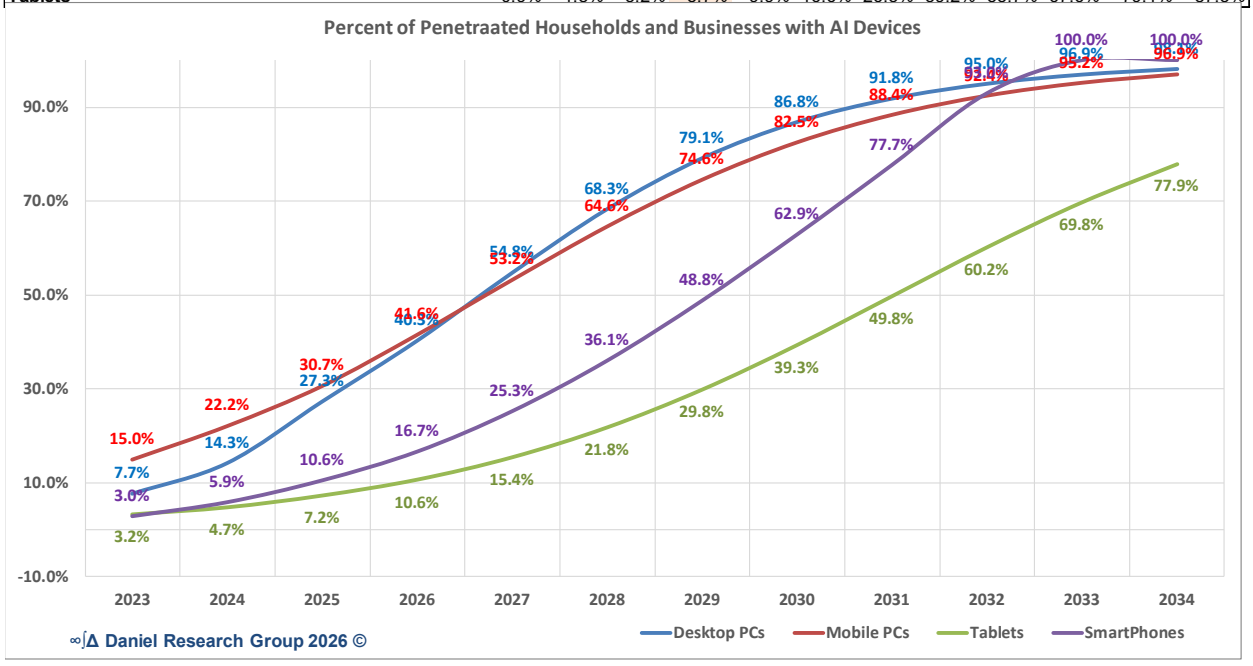
Percent of Penetrated Installed Base

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Desktop PCs	2.1%	4.7%	10.7%	18.4%	28.0%	39.0%	50.4%	61.7%	74.1%	89.0%	100.0%	100.0%
Mobile PCs	0.9%	5.3%	10.2%	14.0%	18.6%	23.7%	29.3%	34.7%	39.8%	44.3%	51.1%	51.8%
SmartPhones	3.0%	5.9%	10.6%	16.7%	25.3%	36.1%	48.8%	62.9%	77.7%	93.0%	100.0%	100.0%
Tablets	0.9%	1.8%	3.2%	5.7%	9.9%	16.6%	26.3%	39.2%	53.7%	67.6%	79.1%	87.3%



Percent of Installed Base

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Desktop PCs	2.1%	4.7%	10.7%	18.4%	28.0%	39.0%	50.4%	61.7%	74.1%	89.0%	100.0%	100.0%
Mobile PCs	0.9%	5.3%	10.2%	14.0%	18.6%	23.7%	29.3%	34.7%	39.8%	44.3%	51.1%	51.8%
SmartPhones	3.0%	5.9%	10.6%	16.7%	25.3%	36.1%	48.8%	62.9%	77.7%	93.0%	100.0%	100.0%
Tablets	0.9%	1.8%	3.2%	5.7%	9.9%	16.6%	26.3%	39.2%	53.7%	67.6%	79.1%	87.3%



How will AI change the Buying Process for Consumer Electronics

Individual Buying Decisions

Individuals are influenced by four source when making buying decision for most products and services.

- External Advocacy – Vendor advertisements
- External Observation – Vendor claims of market share or number of users
- Internal Advocacy – opinions of trusted people you know
- Internal Observation – what trusted people you know have purchased.

Internal Observation carries the most influencing weight (40%), followed by Internal Advocacy (30%), External Observation (20%), then External Advocacy (10%). AI will not change the weight of Internal Observation since it is fact-based. However, both External influence sources will gain importance as they become more targeted and personalized, decreasing the weight of Internal Advocacy.

Household Buying Decisions

While Economic, Demographic and Cultural factors certainly influence technology adoption and buying decisions for the individual or the household, Daniel Research Group has determined that the most important causal influence for the Household buying decisions is the Child-Rearing Stage. AI is compressing decision timelines and reducing friction at every stage. Historically, Child Rearing Stage transitions triggered research-heavy, high-deliberation purchasing and behavioral decisions. AI is converting many of those deliberate decisions into automated or AI-assisted ones — which fundamentally changes what researchers need to measure.

Pre-Child Rearing

Historically characterized by: identity formation, financial independence, mobility, discretionary spending

How AI is changing this stage:

- Household formation decisions (where to live, whether to rent or buy) are increasingly mediated by AI tools that aggregate cost-of-living, career opportunity, and lifestyle data
- Financial behavior is shifting from advice-seeking to AI-delegated advisors and AI budgeting tools are replacing both human advisors and personal deliberation
- Relationship formation itself is AI-influenced through algorithmic matching, changing household formation timelines
- Career management via AI tools is extending financial stability earlier, potentially shortening this life stage for some and lengthening it for others

Early-Child Rearing

Historically characterized by: high financial pressure, brand loyalty formation, time scarcity, safety prioritization

How AI is changing this stage:

- Healthcare navigation is shifting to AI-first — pediatric symptom checking, specialist selection, and medication management are moving out of physician offices into ambient AI tools
- Education decisions begin here and AI tutoring platforms are already influencing school selection logic and supplemental learning investment
- Smart home adoption peaks at this stage — AI-driven security, scheduling, and household management tools directly address the time scarcity that defines this stage
- Purchasing delegation is emerging — AI agents that autonomously reorder household consumables remove entire categories from the active decision set

Late-Child Rearing

Historically characterized by: peak earning, college planning, identity renegotiation, lifestyle expansion

How AI is changing this stage:

- College and education planning is being transformed by AI counseling tools, disrupting a historically high-anxiety, advisor-dependent process
- Career reinvention is accelerating — AI-driven upskilling platforms are enabling mid-career pivots that previous generations deferred to post-child rearing
- Health monitoring becomes proactive — wearables and AI health platforms shift behavior from reactive to predictive
- Financial complexity increases but AI wealth management tools are absorbing decisions previously requiring professional advisors

Post-Child Rearing

Historically characterized by: wealth consolidation, health focus, legacy planning, lifestyle reinvention

How AI is changing this stage:

- Healthcare AI has its deepest impact here — diagnostic tools, medication management, care coordination, and aging-in-place technologies are fundamentally restructuring how this stage is lived
- Social connectivity tools powered by AI are countering the isolation historically associated with this stage, changing consumption patterns around travel, entertainment, and community
- Financial decumulation (spending down assets) is becoming AI-managed, disrupting traditional financial services relationships
- Legacy and estate planning is being democratized by AI legal tools, removing professional gatekeepers

Device demand by child-rearing life stage

Daniel Research Group — consumer device demand index (1=Very low to 5=Very high)

Life stage	Desktop PC	Mobile PC	Tablet	Smartphone
Pre-child rearing Singles & couples, no children	**2 — Low** Home office or gaming anchor; present but not priority	**3 — Moderate** Work & social; rising with remote work norms	**2 — Low** Low — smartphone covers most casual tasks	**5 — Very high** Primary device; social, navigation, entertainment
Early-child rearing Young children at home (0–10)	**3 — Moderate** Household productivity hub; homework starts	**4 — High** Work-from-home parent; school admin & productivity	**5 — Very high** Highest demand — child education, video, shared use	**5 — Very high** Indispensable; scheduling, healthcare, family comms
Late-child rearing Older children / teens at home	**4 — High** Peak demand — teens + parents both need dedicated units	**4 — High** Multiple units common; student & parent work use	**3 — Moderate** Displaced by teen laptops; drops to media/casual use	**5 — Very high** Highest intensity — teens drive multi-unit households
Post-child rearing Empty nesters & retirees	**3 — Moderate** Retained for taxes, finance, hobbies; upgrade cycle slows	**2 — Low** Declines — less commuting, less need for portability	**4 — High** Resurges — health apps, video calls, reading, travel	**4 — High** Firmly established; health monitoring, family contact
Demand index: 5 = Very high 4 = High 3 = Moderate 2 = Low 1 = Very low				

Key insight: Early-child rearing is the only stage where all four device categories are simultaneously at High or Very High demand — the most device-intensive consumer

Business Buying Process

The buying process for technology products in the enterprise typically follows the following steps model:

Trigger Event - A business or business process event that brings awareness to someone in authority that a compelling reason exists to address a need. AI systems will increasingly *generate* their own trigger events. Predictive analytics embedded in ERP, ITSM, and financial systems will surface compelling reasons to act before a human recognizes the need — flagging capacity thresholds, security vulnerabilities, or competitive gaps autonomously. The "someone in authority" may be responding to an AI recommendation rather than lived experience.

Needs Assessment - The task of understanding and defining what that need is, from a business or business process point of view, AI dramatically accelerates and deepens this stage. Natural language interfaces allow stakeholders to describe problems conversationally, while AI synthesizes input across departments to surface latent needs that siloed human assessment would miss. However, it also risks *narrowing* the frame — optimizing for what's measurable over what's strategically important.

Solution Specification - The task of understanding technical, resource and organizational requirements and constraints. This is where AI has the most immediate and dramatic impact. AI agents can generate RFP documents, technical requirement matrices, and constraint analyses in

minutes. The risk is specification by pattern-matching against training data rather than genuine organizational understanding — producing technically complete but contextually hollow specs.

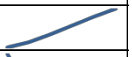
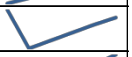
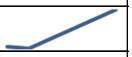
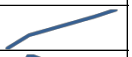
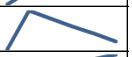
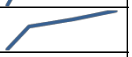
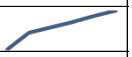
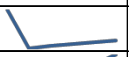
Vendor Selection - The task of selecting brands, vendor or channel from qualified alternatives. AI-powered procurement platforms already score vendors against weighted criteria automatically. As this matures, the human role shifts from *evaluating* alternatives to *setting the criteria and weights* by which AI evaluates them — a significant upstream shift in where judgment actually lives.

AI makes the *mechanical* parts of the buying process faster and cheaper, while making the *interpretive and strategic* parts more valuable and more complex.

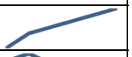
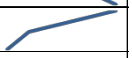
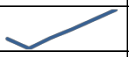
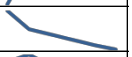
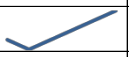
United States Personal Device Market
Market Segment Forecast Overview
Total Market

United States Total Personal Devices Unit Shipments (K)									
Desktop PCs		2025	2026	2027	2028	2029	2030	CAGR ('25-'30)	Trend
Desktop PC	Desktop PC	15,104	13,925	13,992	14,058	14,130	14,199	-1.2%	
AGR	*AGR*	*12.9%*	*-7.8%*	*0.5%*	*0.5%*	*0.5%*	*0.5%*		
Mobile PCs									
Traditional Mobile PCs		47,101	48,052.1	48,853.9	49,642.3	50,444.8	51,226.0	1.7%	
AGR		*3.6%*	*2.0%*	*1.7%*	*1.6%*	*1.6%*	*1.5%*		
Convertible Mobile PCs		6,986	6,752	6,734	6,716	6,701	6,684	-0.9%	
AGR		*-5.2%*	*-3.4%*	*-0.3%*	*-0.3%*	*-0.2%*	*-0.3%*		
	Total Mobile PCs	54,087	54,804	55,588	56,359	57,146	57,910	1.4%	
	AGR	*2.4%*	*1.3%*	*1.4%*	*1.4%*	*1.4%*	*1.3%*		
Total PCs									
	Total PCs	69,190	68,728	69,580	70,416	71,276	72,109	0.8%	
	AGR	*4.5%*	*-0.7%*	*1.2%*	*1.2%*	*1.2%*	*1.2%*		
Tablets									
Detachable		21,029	22,856	23,608	24,377	25,176	25,989	4.3%	
AGR		*6.6%*	*8.7%*	*3.3%*	*3.3%*	*3.3%*	*3.2%*		
Slate		14,872	15,979	15,639	15,302	14,976	14,650	-0.3%	
AGR		*-26.1%*	*7.4%*	*-2.1%*	*-2.2%*	*-2.1%*	*-2.2%*		
	Total Tablets	35,901	38,835	39,248	39,680	40,153	40,639	2.5%	
	AGR	*-9.9%*	*8.2%*	*1.1%*	*1.1%*	*1.2%*	*1.2%*		
Total Computers									
Total Computers		105,092	107,563	108,828	110,096	111,428	112,748	1.4%	
AGR		*4.5%*	*-0.7%*	*1.2%*	*1.2%*	*1.2%*	*1.2%*		
Mobile Phones									
	Standard Phone	4,309	3,554	3,594	3,633	3,673	3,711	-2.9%	
	AGR	*-5.6%*	*-17.5%*	*1.1%*	*1.1%*	*1.1%*	*1.0%*		
	SmartPhones	133,930	126,915	129,785	132,651	135,587	138,497	0.7%	
	AGR	*4.6%*	*-5.2%*	*2.3%*	*2.2%*	*2.2%*	*2.1%*		
Total Mobile Phones		138,239	130,468	133,379	136,284	139,259	142,207	0.6%	
AGR		*4.2%*	*-5.6%*	*2.2%*	*2.2%*	*2.2%*	*2.1%*		
Total Devices									
Total Devices		243,331	238,031	242,207	246,380	250,688	254,955	0.9%	
AGR		*1.9%*	*-2.2%*	*1.8%*	*1.7%*	*1.7%*	*1.7%*		
∞∫Δ Daniel Research Group © (2026)									

Consumer Segment

United States Consumer Personal Devices Unit Shipments (K)									
Desktop PCs		**2025**	**2026**	**2027**	**2028**	**2029**	**2030**	**CAGR ('25-'30)**	**Trend**
Desktop PC	**Desktop PC**	6,235	6,163	6,049	5,933	5,820	5,705	-1.8%	
AGR	***AGR***	*9.0%*	*-1.1%*	*-1.9%*	*-1.9%*	*-1.9%*	*-2.0%*		
Mobile PCs									
Traditional Mobile PCs		22,441	22,730.7	23,220.5	23,707.5	24,205.0	24,695.8	1.9%	
AGR		*14.8%*	*1.3%*	*2.2%*	*2.1%*	*2.1%*	*2.0%*		
Convertible Mobile PCs		2,518	2,228	2,286	2,343	2,402	2,461	-0.5%	
AGR		*4.8%*	*-11.5%*	*2.6%*	*2.5%*	*2.5%*	*2.4%*		
	Total Mobile PCs	24,959	24,959	25,506	26,051	26,607	27,157	1.7%	
	AGR	*13.7%*	*0.0%*	*2.2%*	*2.1%*	*2.1%*	*2.1%*		
Total PCs									
	Total PCs	31,194	31,122	31,555	31,984	32,427	32,862	1.0%	
	AGR	*12.7%*	*-0.2%*	*1.4%*	*1.4%*	*1.4%*	*1.3%*		
Tablets									
Detachable		17,525	19,068	19,824	20,598	21,403	22,223	4.9%	
AGR		*9.8%*	*8.8%*	*4.0%*	*3.9%*	*3.9%*	*3.8%*		
Slate		13,845	15,183	14,914	14,642	14,375	14,103	0.4%	
AGR		*-26.3%*	*9.7%*	*-1.8%*	*-1.8%*	*-1.8%*	*-1.9%*		
	Total Tablets	31,370	34,252	34,738	35,240	35,778	36,326	3.0%	
	AGR	*-9.7%*	*9.2%*	*1.4%*	*1.4%*	*1.5%*	*1.5%*		
Total Computers									
Total Computers		62,564	65,374	66,294	67,224	68,205	69,188	2.0%	
AGR		*12.7%*	*-0.2%*	*1.4%*	*1.4%*	*1.4%*	*1.3%*		
Mobile Phones									
	Standard Phone	4,189	3,470	3,506	3,540	3,575	3,607	-2.9%	
	AGR	*-5.6%*	*-17.2%*	*1.0%*	*1.0%*	*1.0%*	*0.9%*		
	SmartPhones	121,531	114,524	117,357	120,193	123,097	125,985	0.7%	
	AGR	*4.4%*	*-5.8%*	*2.5%*	*2.4%*	*2.4%*	*2.3%*		
Total Mobile Phones		125,719	117,994	120,863	123,733	126,672	129,593	0.6%	
AGR		*4.0%*	*-6.1%*	*2.4%*	*2.4%*	*2.4%*	*2.3%*		
Total Devices									
Total Devices		188,284	183,368	187,156	190,957	194,877	198,780	1.1%	
AGR		*2.7%*	*-2.6%*	*2.1%*	*2.0%*	*2.1%*	*2.0%*		

Enterprise Segment

United States Enterprise Personal Devices Unit Shipments (K)									
Desktop PCs		2025	2026	2027	2028	2029	2030	CAGR ('25-'30)	Trend
Desktop PC	Desktop PC	8,869	7,761	7,943	8,124	8,310	8,494	-0.9%	
AGR	*AGR*	*15.8%*	*-12.5%*	*2.3%*	*2.3%*	*2.3%*	*2.2%*		
Mobile PCs									
Traditional Mobile PCs		24,660	25,321.4	25,633.4	25,934.8	26,239.9	26,530.2	1.5%	
AGR		*-4.8%*	*2.7%*	*1.2%*	*1.2%*	*1.2%*	*1.1%*		
Convertible Mobile PCs		4,468	4,523	4,449	4,373	4,299	4,223	-1.1%	
AGR		*-10.1%*	*1.2%*	*-1.6%*	*-1.7%*	*-1.7%*	*-1.8%*		
	Total Mobile PCs	29,128	29,845	30,082	30,308	30,539	30,753	1.1%	
	AGR	*-5.6%*	*2.5%*	*0.8%*	*0.8%*	*0.8%*	*0.7%*		
Total PCs									
	Total PCs	37,996	37,606	38,025	38,432	38,849	39,247	0.6%	
	AGR	*-1.4%*	*-1.0%*	*1.1%*	*1.1%*	*1.1%*	*1.0%*		
Tablets									
Detachable		3,504	3,788	3,784	3,779	3,773	3,765	1.4%	
AGR		*-7.2%*	*8.1%*	*-0.1%*	*-0.1%*	*-0.1%*	*-0.2%*		
Slate		1,027	795	725	660	601	547	-11.8%	
AGR		*-23.3%*	*-22.6%*	*-8.9%*	*-8.9%*	*-8.9%*	*-9.0%*		
	Total Tablets	4,531	4,583	4,509	4,439	4,375	4,313	-1.0%	
	AGR	*-11.4%*	*1.1%*	*-1.6%*	*-1.6%*	*-1.4%*	*-1.4%*		
Total Computers									
Total Computers		42,528	42,189	42,534	42,872	43,224	43,560	0.5%	
AGR		*-1.4%*	*-1.0%*	*1.1%*	*1.1%*	*1.1%*	*1.0%*		
Mobile Phones									
	Standard Phone	120	84	88	93	98	103	-2.9%	
	AGR	*-5.6%*	*-30.2%*	*5.5%*	*5.4%*	*5.4%*	*5.3%*		
	SmartPhones	12,399	12,390	12,428	12,458	12,489	12,511	0.2%	
	AGR	*6.8%*	*-0.1%*	*0.3%*	*0.2%*	*0.2%*	*0.2%*		
Total Mobile Phones		12,520	12,474	12,516	12,552	12,587	12,615	0.2%	
AGR		*6.7%*	*-0.4%*	*0.3%*	*0.3%*	*0.3%*	*0.2%*		
Total Devices									
Total Devices		55,047	54,663	55,051	55,423	55,811	56,175	0.4%	
AGR		*-0.6%*	*-0.7%*	*0.7%*	*0.7%*	*0.7%*	*0.7%*		
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Product Forecast Tables and Charts

Desktop PCs

Consumer

United States Consumer Desktop PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	6,235	6,163	6,049	5,933	5,820	5,705	-1.9%	
AGR	*9.0%*	*-1.1%*	*-1.9%*	*-1.9%*	*-1.9%*	*-2.0%*		
Revenue ($M)	7,903	9,171	9,271	9,367	9,372	9,370	0.5%	
AGR	*14.2%*	*16.1%*	*1.1%*	*1.0%*	*0.1%*	*0.0%*		
Average Price ($)	1,268	1,488	1,533	1,579	1,610	1,642	2.5%	
AGR	*4.8%*	*17.4%*	*3.0%*	*3.0%*	*2.0%*	*2.0%*		
Installed Base (K)	16,538	16,509	16,426	16,284	16,096	15,861	-1.0%	
AGR	*0.0%*	*-0.2%*	*-0.5%*	*-0.9%*	*-1.2%*	*-1.5%*		
Removal Age (Y)	3.86	3.80	3.76	3.76	3.75	3.77	-0.2%	
AGR	*-4.8%*	*-1.5%*	*-0.9%*	*-0.1%*	*-0.2%*	*0.5%*		
Average Installed Base Age (Y)	3.97	3.93	3.92	3.92	3.94	3.96	0.2%	
AGR	*-1.9%*	*-1.1%*	*-0.3%*	*0.1%*	*0.5%*	*0.5%*		
Replacement Cycle Length (Y)	3.65	3.67	3.68	3.68	3.68	3.67	0.0%	
AGR	*-1.7%*	*0.4%*	*0.3%*	*0.0%*	*0.0%*	*-0.3%*		
Units per Households (#)	1.00	1.02	1.03	1.03	1.03	1.02	0.2%	
AGR		*1.7%*	*0.9%*	*0.4%*	*-0.1%*	*-0.5%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*12.3%*	*12.0%*	*11.7%*	*11.5%*	*11.3%*	*11.2%*	-1.1%	
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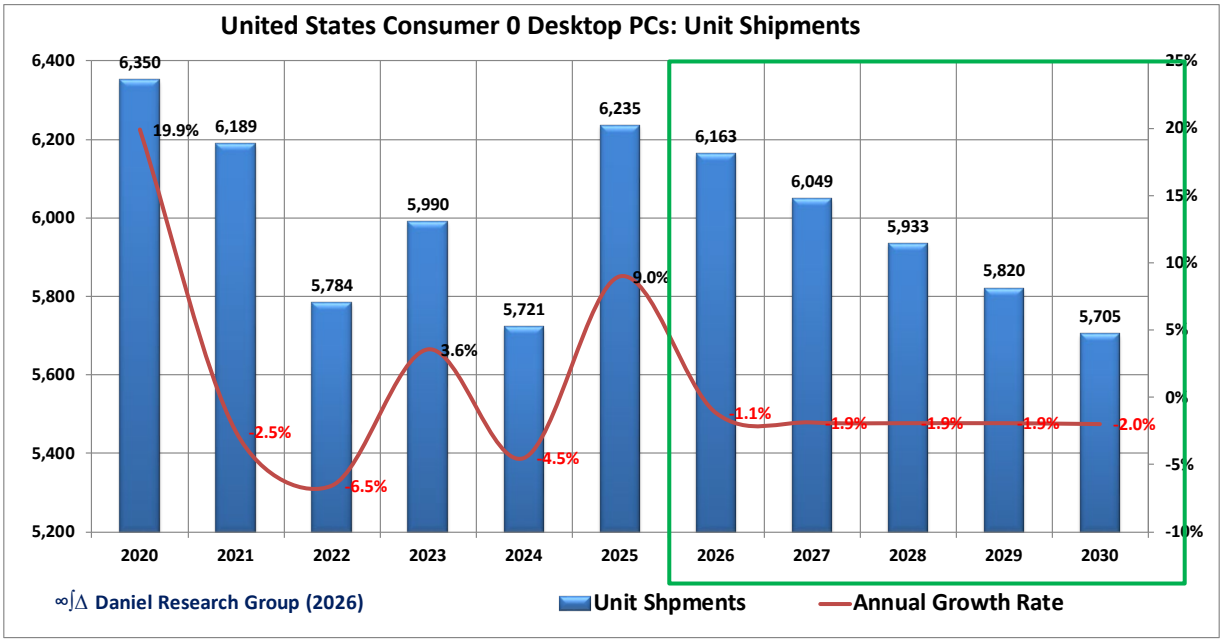

Enterprise

United States Enterprise Desktop PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	8,869	7,761	7,943	8,124	8,310	8,494	2.3%	
AGR	*15.8%*	*-12.5%*	*2.3%*	*2.3%*	*2.3%*	*2.2%*		
Revenue ($M)	7,779	7,924	8,353	8,800	9,181	9,572	4.8%	
AGR	*28.8%*	*1.9%*	*5.4%*	*5.4%*	*4.3%*	*4.3%*		
Average Price ($)	877	1,021	1,052	1,083	1,105	1,127	2.5%	
AGR	*11.2%*	*16.4%*	*3.0%*	*3.0%*	*2.0%*	*2.0%*		
Installed Base (K)	24,623	23,520	22,789	22,348	22,151	22,129	-1.5%	
AGR	*-2.9%*	*-4.5%*	*-3.1%*	*-1.9%*	*-0.9%*	*-0.1%*		
Removal Age (Y)	4.42	4.42	4.25	4.09	3.92	3.80	-3.7%	
AGR	*-7.0%*	*0.0%*	*-4.0%*	*-3.7%*	*-4.0%*	*-3.2%*		
Average Installed Base Age (Y)	4.39	4.31	4.21	4.11	4.02	3.95	-2.1%	
AGR	*-4.3%*	*-1.9%*	*-2.3%*	*-2.4%*	*-2.1%*	*-1.8%*		
Replacement Cycle Length (Y)	3.57	3.65	3.63	3.61	3.60	3.60	-0.4%	
AGR	*-2.8%*	*2.4%*	*-0.7%*	*-0.5%*	*-0.1%*	*-0.1%*		
Units per Businesses (#)	5.59	5.31	5.20	5.13	5.12	5.10	-1.0%	
AGR	*-2.0%*	*-5.0%*	*-2.0%*	*-1.3%*	*-0.3%*	*-0.4%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*70.3%*	*70.3%*	*70.4%*	*70.4%*	*70.4%*	*70.4%*	*0.1%*	
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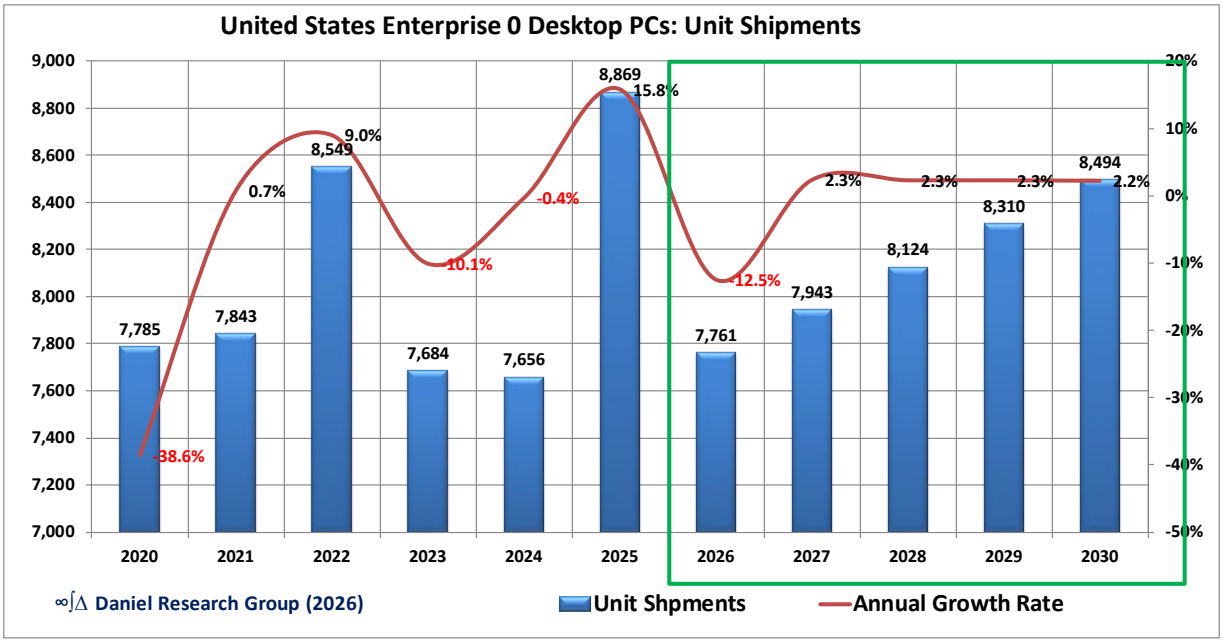

Total Desktop PCs

United States Consumer & Enterprise Desktop PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	15,104	13,925	13,992	14,058	14,130	14,199	*0.5%*	
AGR	*12.9%*	*-7.8%*	*0.5%*	*0.5%*	*0.5%*	*0.5%*		
Revenue ($M)	15,682	17,096	17,624	18,167	18,553	18,942	*2.6%*	
AGR	*21.0%*	*9.0%*	*3.1%*	*3.1%*	*2.1%*	*2.1%*		
Average Price ($)	1,038	1,228	1,260	1,292	1,313	1,334	*2.1%*	
AGR	*7.2%*	*18.2%*	*2.6%*	*2.6%*	*1.6%*	*1.6%*		
Installed Base (K)	41,160	40,029	39,216	38,632	38,247	37,990	*-1.3%*	
AGR	*-1.7%*	*-2.7%*	*-2.0%*	*-1.5%*	*-1.0%*	*-0.7%*		
Removal Age (Y)	4.20	4.17	4.05	3.95	3.85	3.79	*-2.3%*	
AGR	*-6.2%*	*-0.8%*	*-2.9%*	*-2.3%*	*-2.5%*	*-1.7%*		
Average Installed Base Age (Y)	4.22	4.15	4.09	4.03	3.99	3.95	*-1.2%*	
AGR	*-3.5%*	*-1.7%*	*-1.5%*	*-1.4%*	*-1.0%*	*-0.8%*		
Replacement Cycle Length (Y)	3.60	3.66	3.65	3.64	3.64	3.63	*-0.2%*	
AGR	*-2.4%*	*1.6%*	*-0.3%*	*-0.3%*	*-0.1%*	*-0.2%*		
Units per Households & Businesses (#)	1.97	1.94	1.92	1.92	1.92	1.92	*-0.3%*	
AGR	*-1.6%*	*-1.5%*	*-0.7%*	*-0.4%*	*0.0%*	*0.0%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*14.9%*	*14.6%*	*14.3%*	*14.1%*	*13.8%*	*13.7%*	*-1.2%*	
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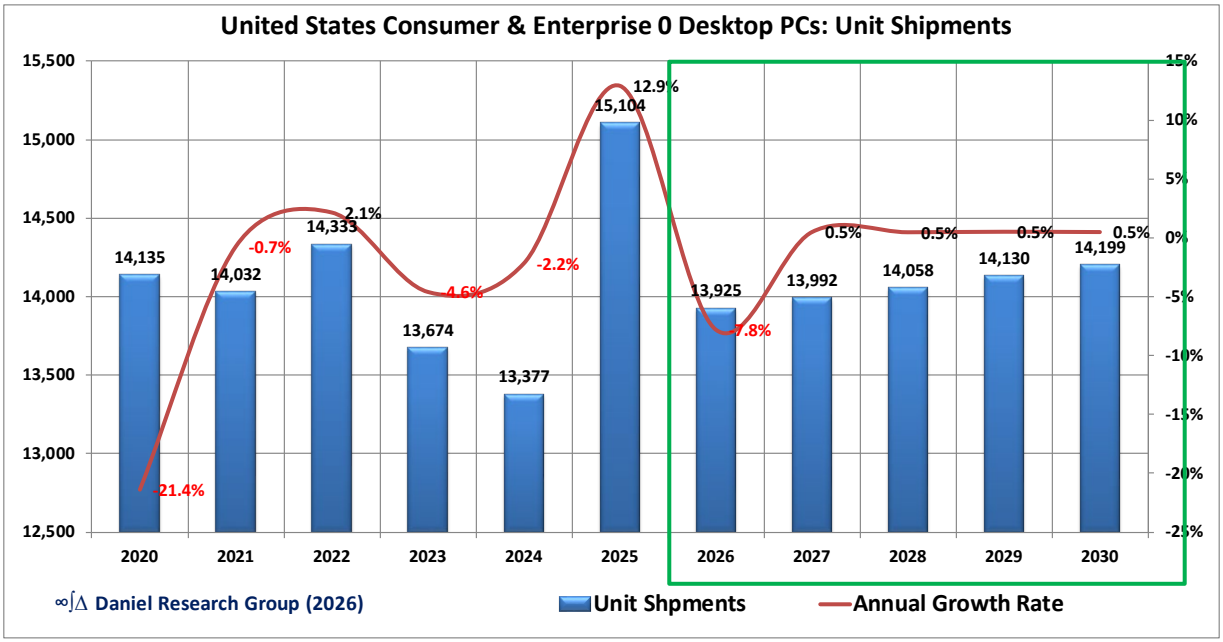

Mobile PC

Consumer Convertible

United States Consumer Convertible Mobile PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	2,518	2,228	2,286	2,343	2,402	2,461	2.5%	
AGR	*4.8%*	*-11.5%*	*2.6%*	*2.5%*	*2.5%*	*2.4%*		
Revenue ($M)	2,266	2,486	2,627	2,774	2,901	3,031	5.1%	
AGR	*4.1%*	*9.7%*	*5.7%*	*5.6%*	*4.6%*	*4.5%*		
Average Price ($)	900	1,116	1,149	1,184	1,207	1,232	2.5%	
AGR	*-0.7%*	*24.0%*	*3.0%*	*3.0%*	*2.0%*	*2.0%*		
Installed Base (K)	8,872	8,524	8,243	8,033	7,881	7,801	-2.2%	
AGR	*-1.8%*	*-3.9%*	*-3.3%*	*-2.5%*	*-1.9%*	*-1.0%*		
Removal Age (Y)	4.26	4.50	4.56	4.57	4.57	4.46	-0.3%	
AGR	*3.0%*	*5.8%*	*1.3%*	*0.1%*	*0.0%*	*-2.4%*		
Average Installed Base Age (Y)	4.27	4.38	4.42	4.41	4.33	4.25	-0.8%	
AGR	*2.2%*	*2.7%*	*0.9%*	*-0.4%*	*-1.6%*	*-1.9%*		
Replacement Cycle Length (Y)	4.31	4.31	4.21	4.15	4.09	4.07	-1.4%	
AGR	*-2.9%*	*-0.1%*	*-2.2%*	*-1.6%*	*-1.5%*	*-0.4%*		
Units per Households (#)	1.00	1.02	1.02	1.02	1.02	1.02	0.1%	
AGR		*1.5%*	*0.4%*	*0.4%*	*0.0%*	*-0.4%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*6.6%*	*6.2%*	*5.9%*	*5.7%*	*5.6%*	*5.5%*	*-1.1%*	
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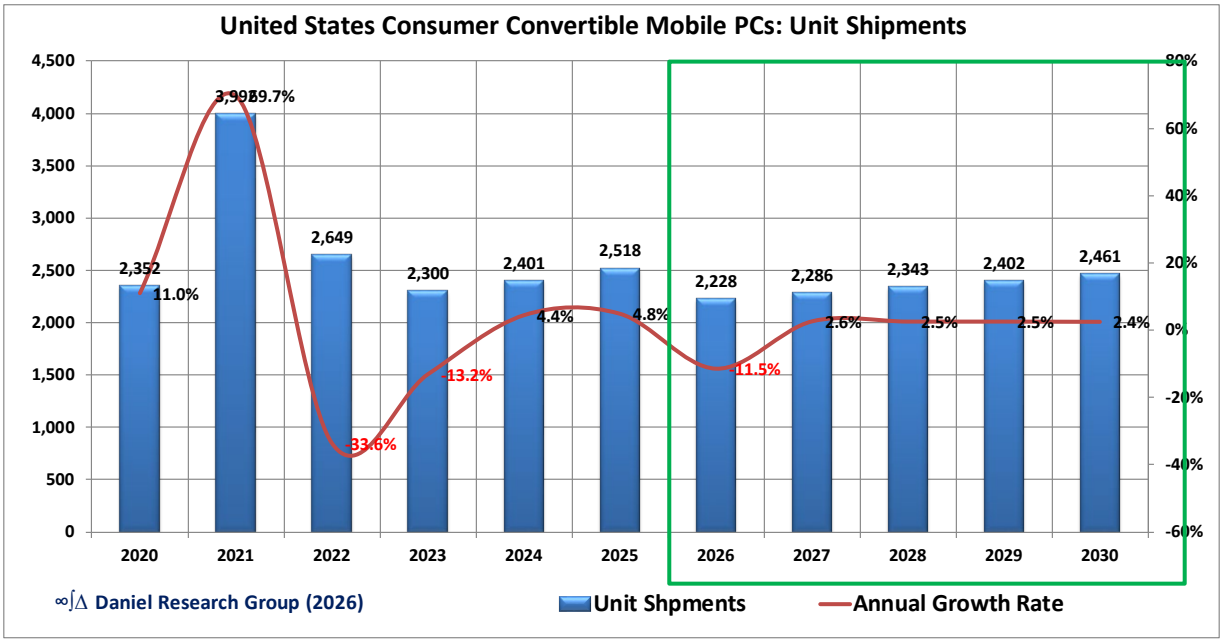

Consumer Traditional

United States Consumer Traditional Mobile PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	22,441	22,731	23,220	23,708	24,205	24,696	*2.1%*	
AGR	*14.8%*	*1.3%*	*2.2%*	*2.1%*	*2.1%*	*2.0%*		
Revenue ($M)	27,696	32,822	34,535	36,317	37,821	39,360	*4.6%*	
AGR	*16.6%*	*18.5%*	*5.2%*	*5.2%*	*4.1%*	*4.1%*		
Average Price ($)	1,234	1,444	1,487	1,532	1,563	1,594	*2.5%*	
AGR	*1.5%*	*17.0%*	*3.0%*	*3.0%*	*2.0%*	*2.0%*		
Installed Base (K)	92,345	91,380	91,952	92,729	93,672	94,988	*1.0%*	
AGR	*1.1%*	*-1.0%*	*0.6%*	*0.8%*	*1.0%*	*1.4%*		
Removal Age (Y)	5.01	4.97	5.06	5.06	5.05	4.95	*-0.1%*	
AGR	*-0.3%*	*-0.9%*	*1.9%*	*0.0%*	*-0.1%*	*-2.1%*		
Average Installed Base Age (Y)	4.43	4.45	4.42	4.38	4.33	4.30	*-0.9%*	
AGR	*0.5%*	*0.4%*	*-0.6%*	*-0.9%*	*-1.2%*	*-0.7%*		
Replacement Cycle Length (Y)	5.30	4.86	5.06	5.04	5.03	5.06	*1.0%*	
AGR	*-3.4%*	*-8.4%*	*4.2%*	*-0.3%*	*-0.3%*	*0.7%*		
Units per Households (#)	1.00	1.00	1.00	1.00	1.00	1.00		
AGR								
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*68.6%*	*67.5%*	*67.5%*	*67.5%*	*67.9%*	*68.5%*	*-0.1%*	
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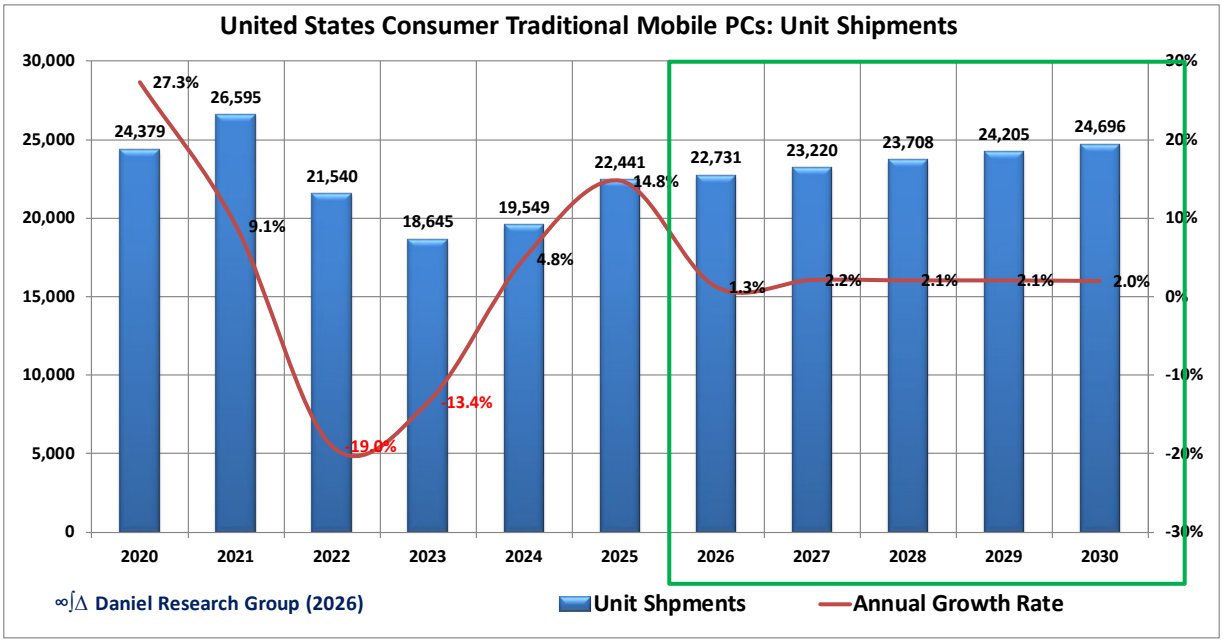

Consumer Total

United States Consumer Mobile PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	24,959	24,959	25,506	26,051	26,607	27,157	*2.1%*	
AGR	*13.7%*	*0.0%*	*2.2%*	*2.1%*	*2.1%*	*2.1%*		
Revenue ($M)	29,962	35,308	37,162	39,091	40,722	42,391	*4.7%*	
AGR	*15.5%*	*17.8%*	*5.2%*	*5.2%*	*4.2%*	*4.1%*		
Average Price ($)	1,200	1,415	1,457	1,501	1,530	1,561	*2.5%*	
AGR	*1.6%*	*17.8%*	*3.0%*	*3.0%*	*2.0%*	*2.0%*		
Installed Base (K)	101,218	99,903	100,195	100,762	101,553	102,789	*0.7%*	
AGR	*0.8%*	*-1.3%*	*0.3%*	*0.6%*	*0.8%*	*1.2%*		
Removal Age (Y)	4.92	4.91	5.00	5.01	5.01	4.90	*-0.1%*	
AGR	*0.1%*	*-0.2%*	*1.8%*	*0.0%*	*0.1%*	*-2.2%*		
Average Installed Base Age (Y)	4.42	4.44	4.42	4.39	4.33	4.30	*-0.8%*	
AGR	*0.7%*	*0.7%*	*-0.5%*	*-0.9%*	*-1.2%*	*-0.8%*		
Replacement Cycle Length (Y)	5.19	4.80	4.97	4.95	4.93	4.97	*0.8%*	
AGR	*-3.3%*	*-7.5%*	*3.6%*	*-0.4%*	*-0.4%*	*0.6%*		
Units per Households (#)	1.12	1.17	1.22	1.23	1.25	1.26	*1.9%*	
AGR	*4.8%*	*4.7%*	*4.0%*	*1.4%*	*1.3%*	*0.8%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*67.4%*	*63.1%*	*60.5%*	*59.5%*	*58.9%*	*58.9%*	*-8.5%*	
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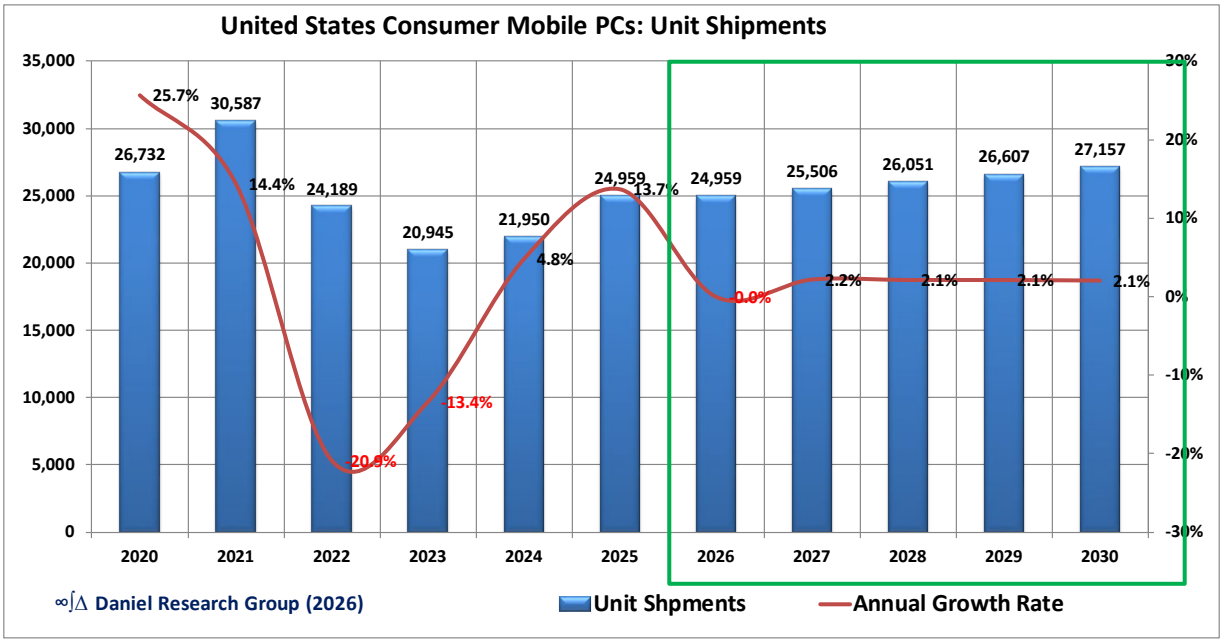

Enterprise Convertible

United States Enterprise Convertible Mobile PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	4,468	4,523	4,449	4,373	4,299	4,223	-1.7%	
AGR	*-10.1%*	*1.2%*	*-1.6%*	*-1.7%*	*-1.7%*	*-1.8%*		
Revenue ($M)	3,371	4,447	4,505	4,561	4,573	4,582	0.8%	
AGR	*-4.1%*	*31.9%*	*1.3%*	*1.2%*	*0.3%*	*0.2%*		
Average Price ($)	754	983	1,013	1,043	1,064	1,085	2.5%	
AGR	*6.7%*	*30.3%*	*3.0%*	*3.0%*	*2.0%*	*2.0%*		
Installed Base (K)	15,949	16,202	15,940	15,584	15,180	14,758	-2.3%	
AGR	*0.1%*	*1.6%*	*-1.6%*	*-2.2%*	*-2.6%*	*-2.8%*		
Removal Age (Y)	3.53	3.84	4.02	4.21	4.34	4.44	3.7%	
AGR	*12.1%*	*8.7%*	*4.7%*	*4.6%*	*3.3%*	*2.3%*		
Average Installed Base Age (Y)	3.74	3.94	4.11	4.23	4.31	4.35	2.5%	
AGR	*8.4%*	*5.2%*	*4.4%*	*2.9%*	*1.8%*	*0.9%*		
Replacement Cycle Length (Y)	4.58	4.79	4.38	4.30	4.23	4.18	-3.4%	
AGR	*-0.7%*	*4.7%*	*-8.5%*	*-2.0%*	*-1.6%*	*-1.2%*		
Units per Businesses (#)	3.13	2.93	2.77	2.65	2.55	2.44	-4.5%	
AGR	*-10.0%*	*-6.4%*	*-5.2%*	*-4.6%*	*-3.9%*	*-4.2%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*81.3%*	*87.8%*	*92.2%*	*95.2%*	*97.0%*	*98.2%*	*16.8%*	
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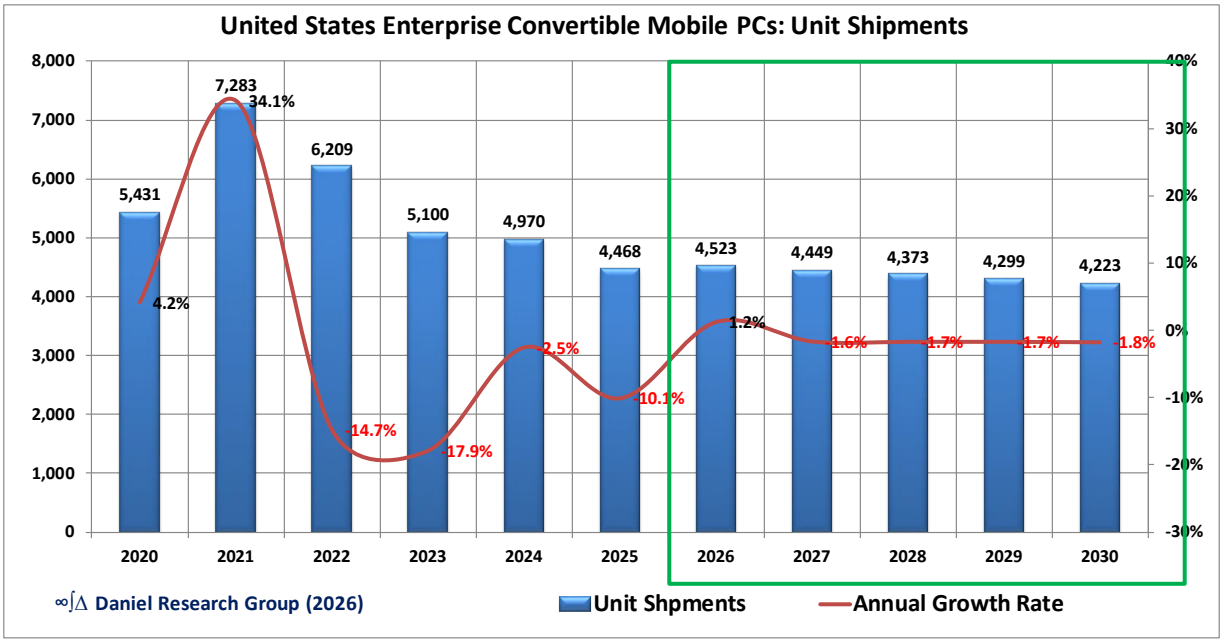

Enterprise Traditional

United States Enterprise Traditional Mobile PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	24,660	25,321	25,633	25,935	26,240	26,530	1.2%	
AGR	*-4.8%*	*2.7%*	*1.2%*	*1.2%*	*1.2%*	*1.1%*		
Revenue ($M)	20,499	26,101	27,216	28,362	29,269	30,185	3.7%	
AGR	*7.5%*	*27.3%*	*4.3%*	*4.2%*	*3.2%*	*3.1%*		
Average Price ($)	831	1,031	1,062	1,094	1,115	1,138	2.5%	
AGR	*12.9%*	*24.0%*	*3.0%*	*3.0%*	*2.0%*	*2.0%*		
Installed Base (K)	100,632	102,916	104,717	106,086	107,160	108,000	1.2%	
AGR	*2.6%*	*2.3%*	*1.8%*	*1.3%*	*1.0%*	*0.8%*		
Removal Age (Y)	4.74	4.79	4.86	4.93	4.97	5.00	1.0%	
AGR	*2.8%*	*1.1%*	*1.4%*	*1.5%*	*0.7%*	*0.6%*		
Average Installed Base Age (Y)	4.16	4.22	4.27	4.30	4.33	4.34	0.7%	
AGR	*1.8%*	*1.4%*	*1.2%*	*0.8%*	*0.6%*	*0.4%*		
Replacement Cycle Length (Y)	5.56	5.47	5.39	5.32	5.26	5.20	-1.2%	
AGR	*-0.2%*	*-1.7%*	*-1.3%*	*-1.4%*	*-1.1%*	*-1.0%*		
Units per Businesses (#)	19.90	19.99	20.35	20.52	20.64	20.54	0.7%	
AGR	*2.2%*	*0.5%*	*1.8%*	*0.9%*	*0.6%*	*-0.5%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*80.7%*	*81.7%*	*82.6%*	*83.6%*	*84.4%*	*85.3%*	*4.6%*	
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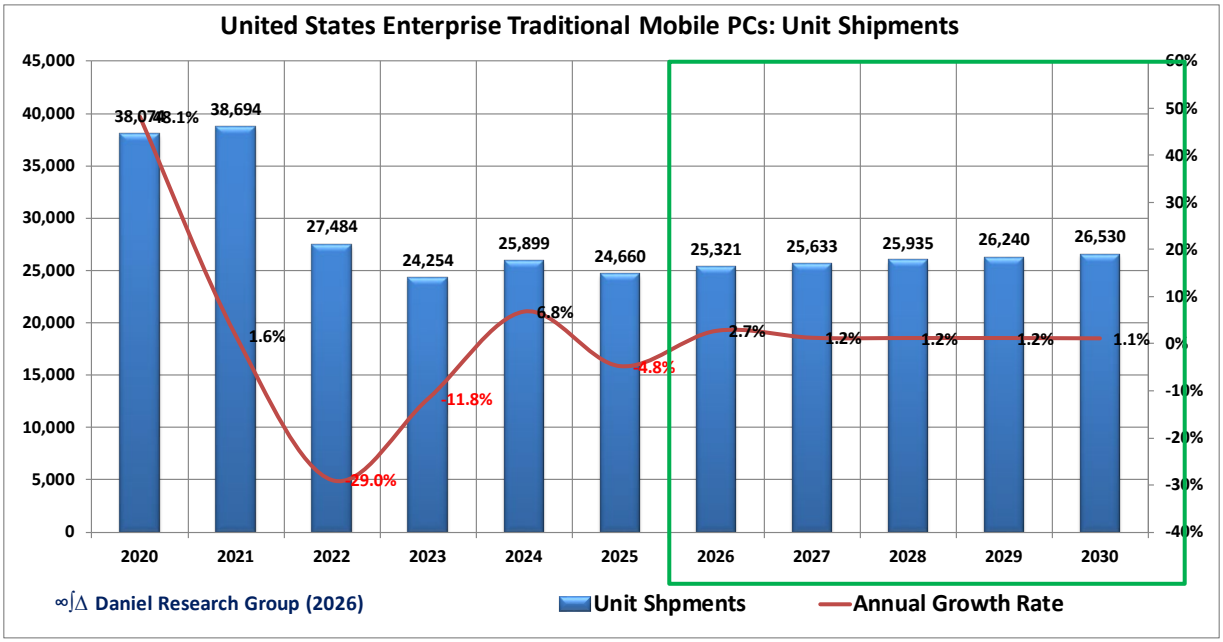

Enterprise Total

United States Enterprise Mobile PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	29,128	29,845	30,082	30,308	30,539	30,753	*0.8%*	
AGR	*-5.6%*	*2.5%*	*0.8%*	*0.8%*	*0.8%*	*0.7%*		
Revenue ($M)	23,870	30,548	31,721	32,923	33,843	34,767	*3.3%*	
AGR	*5.7%*	*28.0%*	*3.8%*	*3.8%*	*2.8%*	*2.7%*		
Average Price ($)	820	1,024	1,054	1,086	1,108	1,131	*2.5%*	
AGR	*12.0%*	*24.9%*	*3.0%*	*3.0%*	*2.0%*	*2.0%*		
Installed Base (K)	116,581	119,117	120,657	121,670	122,339	122,758	*0.8%*	
AGR	*2.3%*	*2.2%*	*1.3%*	*0.8%*	*0.6%*	*0.3%*		
Removal Age (Y)	4.55	4.64	4.72	4.81	4.87	4.91	*1.4%*	
AGR	*3.8%*	*2.0%*	*1.7%*	*1.9%*	*1.1%*	*0.9%*		
Average Installed Base Age (Y)	4.09	4.17	4.24	4.29	4.32	4.34	*1.0%*	
AGR	*2.6%*	*1.9%*	*1.6%*	*1.1%*	*0.8%*	*0.5%*		
Replacement Cycle Length (Y)	5.39	5.36	5.23	5.15	5.10	5.05	*-1.5%*	
AGR	*-0.2%*	*-0.6%*	*-2.5%*	*-1.4%*	*-1.1%*	*-1.0%*		
Units per Businesses (#)	19.02	19.24	19.65	19.89	20.08	20.06	*1.0%*	
AGR	*2.6%*	*1.2%*	*2.1%*	*1.2%*	*1.0%*	*-0.1%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*97.8%*	*98.2%*	*98.6%*	*98.9%*	*99.1%*	*99.3%*	*1.5%*	
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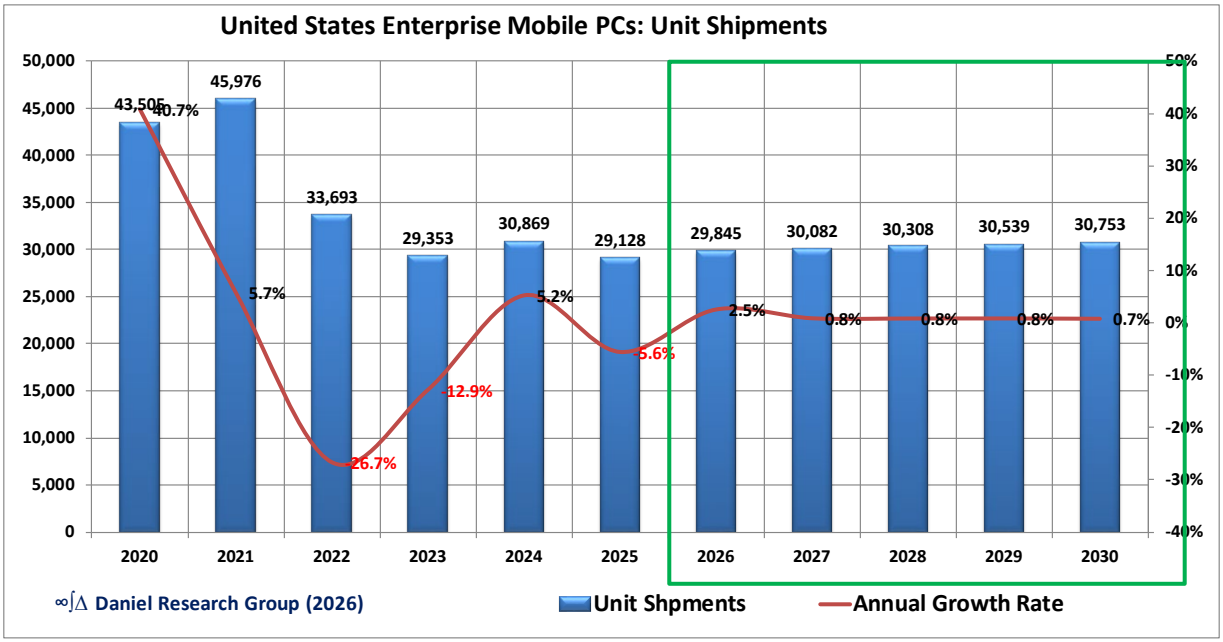

Total Convertible Mobile PCs

United States Consumer & Enterprise Convertible Mobile PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	6,986	6,752	6,734	6,716	6,701	6,684	-0.3%	
AGR	-5.2%	-3.4%	-0.3%	-0.3%	-0.2%	-0.3%		
Revenue ($M)	5,637	6,933	7,132	7,335	7,474	7,614	2.4%	
AGR	-0.9%	23.0%	2.9%	2.8%	1.9%	1.9%		
Average Price ($)	807	1,027	1,059	1,092	1,115	1,139	2.6%	
AGR	4.5%	27.3%	3.1%	3.1%	2.1%	2.1%		
Installed Base (K)	24,821	24,725	24,183	23,617	23,061	22,558	-2.3%	
AGR	-0.6%	-0.4%	-2.2%	-2.3%	-2.4%	-2.2%		
Removal Age (Y)	3.80	4.08	4.21	4.33	4.42	4.45	2.2%	
AGR	8.3%	7.4%	3.2%	2.9%	2.1%	0.6%		
Average Installed Base Age (Y)	3.93	4.09	4.22	4.29	4.32	4.31	1.3%	
AGR	5.9%	4.1%	3.1%	1.7%	0.6%	-0.1%		
Replacement Cycle Length (Y)	4.48	4.61	4.32	4.24	4.18	4.14	-2.7%	
AGR	-1.5%	3.0%	-6.2%	-1.9%	-1.5%	-0.9%		
Units per Households & Businesses (#)	1.78	1.77	1.75	1.72	1.69	1.65	-1.9%	
AGR	-3.1%	-0.1%	-1.5%	-1.6%	-1.8%	-2.4%		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	9.9%	9.8%	9.7%	9.6%	9.5%	9.5%	-0.5%	
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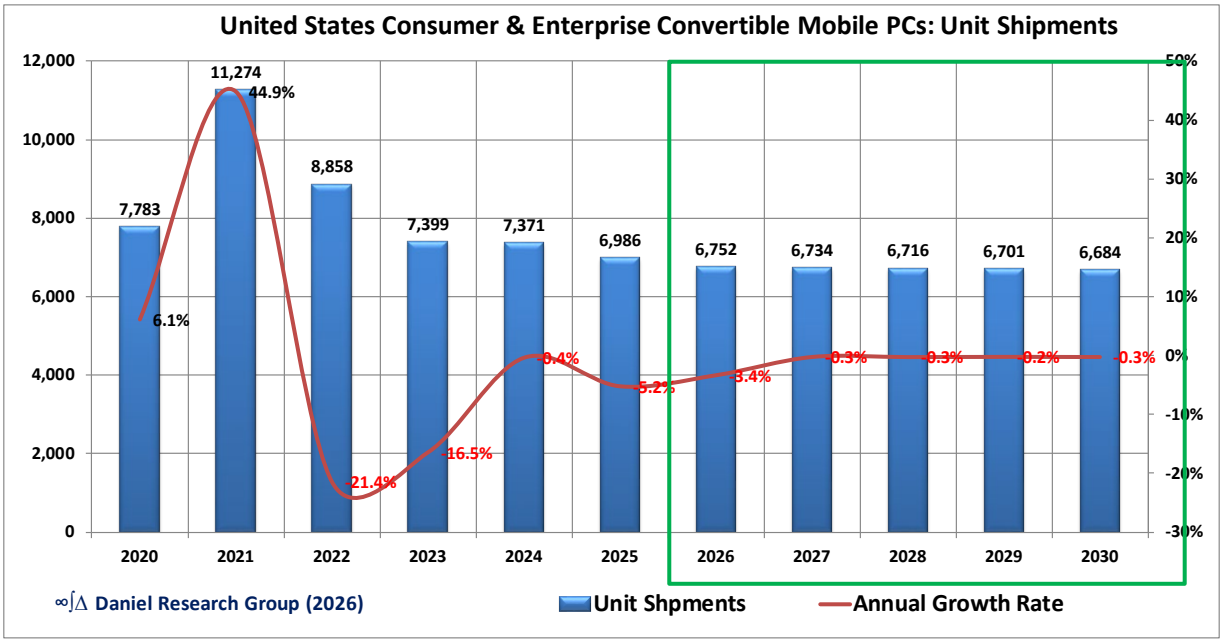

Total Traditional Mobile PCs

United States Consumer & Enterprise Traditional Mobile PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	47,101	48,052	48,854	49,642	50,445	51,226	*1.6%*	
AGR	*3.6%*	*2.0%*	*1.7%*	*1.6%*	*1.6%*	*1.5%*		
Revenue ($M)	48,195	58,923	61,751	64,679	67,090	69,544	*4.2%*	
AGR	*12.5%*	*22.3%*	*4.8%*	*4.7%*	*3.7%*	*3.7%*		
Average Price ($)	1,023	1,226	1,264	1,303	1,330	1,358	*2.6%*	
AGR	*8.6%*	*19.8%*	*3.1%*	*3.1%*	*2.1%*	*2.1%*		
Installed Base (K)	192,977	194,295	196,670	198,815	200,832	202,989	*1.1%*	
AGR	*1.9%*	*0.7%*	*1.2%*	*1.1%*	*1.0%*	*1.1%*		
Removal Age (Y)	4.85	4.86	4.94	4.99	5.00	4.97	*0.6%*	
AGR	*1.4%*	*0.2%*	*1.7%*	*0.8%*	*0.4%*	*-0.6%*		
Average Installed Base Age (Y)	4.28	4.32	4.34	4.34	4.33	4.32	*0.0%*	
AGR	*1.2%*	*1.0%*	*0.4%*	*0.0%*	*-0.2%*	*-0.2%*		
Replacement Cycle Length (Y)	5.43	5.16	5.23	5.19	5.15	5.14	*-0.1%*	
AGR	*-1.8%*	*-5.1%*	*1.4%*	*-0.9%*	*-0.7%*	*-0.2%*		
Units per Households & Businesses (#)	1.98	2.01	2.03	2.03	2.03	2.02	*0.1%*	
AGR	*0.8%*	*1.6%*	*0.6%*	*0.3%*	*0.0%*	*-0.3%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*69.1%*	*68.1%*	*68.1%*	*68.2%*	*68.6%*	*69.2%*	*0.0%*	
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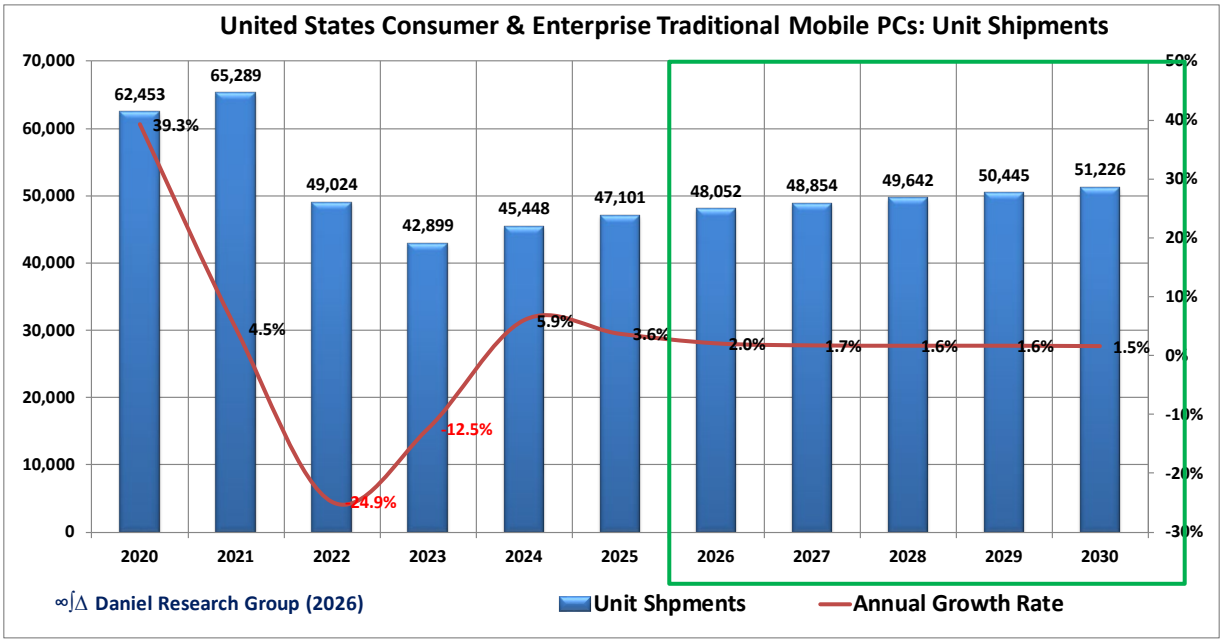

Total Mobile PC

United States Consumer & Enterprise Mobile PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	54,087	54,804	55,588	56,359	57,146	57,910	*1.4%*	
AGR	*2.4%*	*1.3%*	*1.4%*	*1.4%*	*1.4%*	*1.3%*		
Revenue ($M)	53,832	65,857	68,883	72,014	74,564	77,158	*4.0%*	
AGR	*10.9%*	*22.3%*	*4.6%*	*4.5%*	*3.5%*	*3.5%*		
Average Price ($)	995	1,202	1,239	1,278	1,305	1,332	*2.6%*	
AGR	*8.3%*	*20.7%*	*3.1%*	*3.1%*	*2.1%*	*2.1%*		
Installed Base (K)	217,798	219,020	220,852	222,431	223,893	225,547	*0.7%*	
AGR	*1.6%*	*0.6%*	*0.8%*	*0.7%*	*0.7%*	*0.7%*		
Removal Age (Y)	4.70	4.75	4.84	4.89	4.93	4.91	*0.8%*	
AGR	*2.1%*	*1.0%*	*1.8%*	*1.1%*	*0.7%*	*-0.4%*		
Average Installed Base Age (Y)	4.23	4.29	4.32	4.33	4.33	4.32	*0.2%*	
AGR	*1.8%*	*1.4%*	*0.7%*	*0.2%*	*-0.1%*	*-0.1%*		
Replacement Cycle Length (Y)	5.30	5.09	5.11	5.06	5.02	5.01	*-0.4%*	
AGR	*-1.7%*	*-4.0%*	*0.4%*	*-0.9%*	*-0.8%*	*-0.2%*		
Units per Households & Businesses (#)	2.25	2.39	2.49	2.53	2.56	2.57	*1.8%*	
AGR	*5.4%*	*6.2%*	*4.4%*	*1.5%*	*1.1%*	*0.3%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*68.7%*	*64.7%*	*62.2%*	*61.2%*	*60.6%*	*60.6%*	*-8.2%*	
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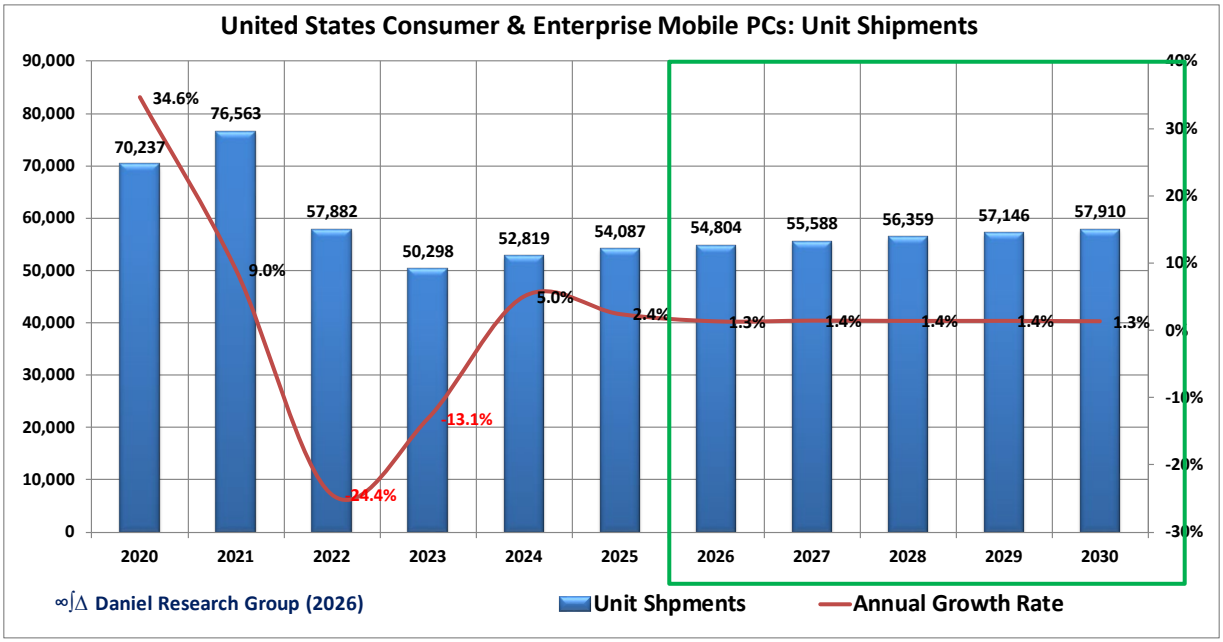

Tablets

Consumer Slate

United States Consumer Slate Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	13,845	15,183	14,914	14,642	14,375	14,103	-1.8%	
AGR	-26.3%	9.7%	-1.8%	-1.8%	-1.8%	-1.9%		
Revenue ($M)	2,734	3,513	3,554	3,594	3,599	3,602	0.6%	
AGR	-22.3%	28.5%	1.2%	1.1%	0.1%	0.1%		
Average Price ($)	197	231	238	245	250	255	2.5%	
AGR	5.5%	17.2%	3.0%	3.0%	2.0%	2.0%		
Installed Base (K)	91,143	84,112	78,349	73,422	69,100	65,569	-6.0%	
AGR	-9.4%	-7.7%	-6.9%	-6.3%	-5.9%	-5.1%		
Removal Age (Y)	6.54	6.57	6.53	6.39	6.28	5.99	-2.3%	
AGR	7.7%	0.3%	-0.5%	-2.2%	-1.8%	-4.5%		
Average Installed Base Age (Y)	5.30	5.28	5.21	5.12	5.01	4.94	-1.6%	
AGR	2.3%	-0.5%	-1.4%	-1.7%	-2.1%	-1.4%		
Replacement Cycle Length (Y)	4.91	4.79	4.79	4.75	4.70	4.72	-0.4%	
AGR	-0.5%	-2.5%	0.1%	-0.8%	-1.2%	0.5%		
Units per Households (#)	1.17	1.08	1.01	1.00	1.00	1.00	-2.0%	
AGR	-10.6%	-7.8%	-6.9%	-0.7%				
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	57.7%	57.4%	57.1%	53.5%	50.1%	47.3%	-10.4%	
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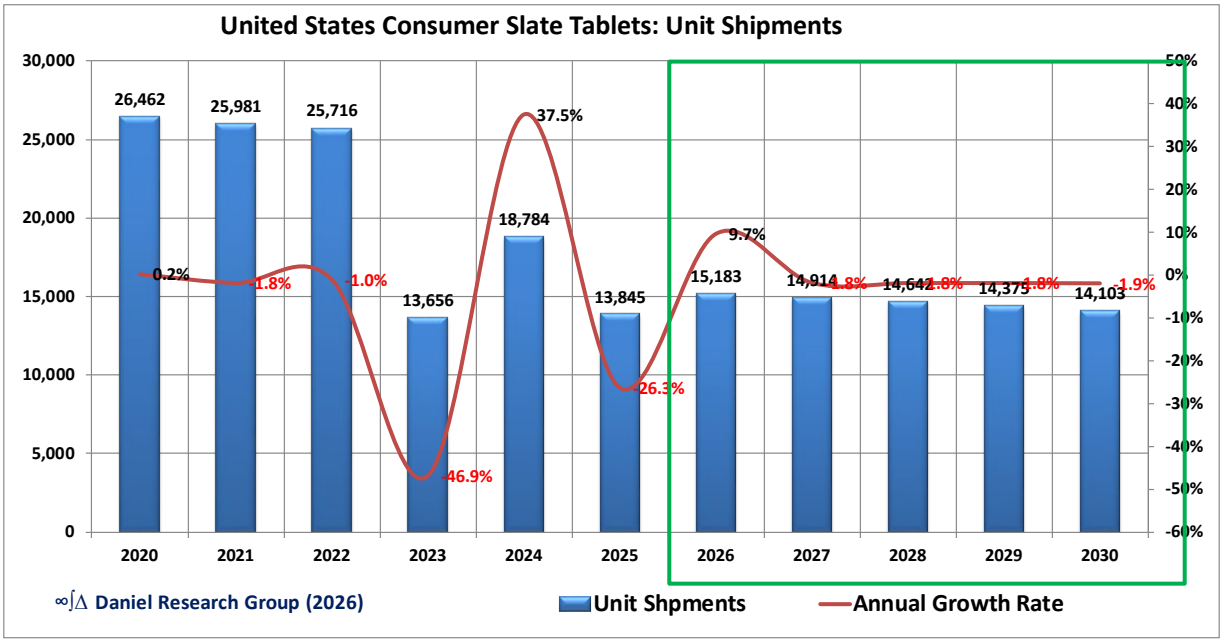

Consumer Detachable

United States Consumer Detachable Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	17,525	19,068	19,824	20,598	21,403	22,223	3.9%	
AGR	*9.8%*	*8.8%*	*4.0%*	*3.9%*	*3.9%*	*3.8%*		
Revenue ($M)	11,173	14,499	15,526	16,616	17,610	18,651	6.5%	
AGR	*5.0%*	*29.8%*	*7.1%*	*7.0%*	*6.0%*	*5.9%*		
Average Price ($)	638	760	783	807	823	839	2.5%	
AGR	*-4.4%*	*19.3%*	*3.0%*	*3.0%*	*2.0%*	*2.0%*		
Installed Base (K)	68,417	70,109	71,676	73,490	75,532	77,909	2.7%	
AGR	*3.1%*	*2.5%*	*2.2%*	*2.5%*	*2.8%*	*3.1%*		
Removal Age (Y)	4.02	4.18	4.29	4.41	4.50	4.51	1.9%	
AGR	*5.8%*	*3.9%*	*2.6%*	*2.7%*	*2.2%*	*0.1%*		
Average Installed Base Age (Y)	3.96	4.07	4.15	4.17	4.16	4.14	0.4%	
AGR	*5.4%*	*2.9%*	*1.8%*	*0.7%*	*-0.3%*	*-0.5%*		
Replacement Cycle Length (Y)	5.42	5.03	4.93	4.91	4.90	4.93	-0.5%	
AGR	*-6.4%*	*-7.1%*	*-2.2%*	*-0.3%*	*-0.2%*	*0.5%*		
Units per Households (#)	3.10	3.23	3.35	3.49	3.65	3.83	4.4%	
AGR	*3.5%*	*4.1%*	*3.9%*	*4.1%*	*4.5%*	*5.0%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*16.4%*	*16.0%*	*15.7%*	*15.3%*	*15.0%*	*14.7%*	*-1.7%*	
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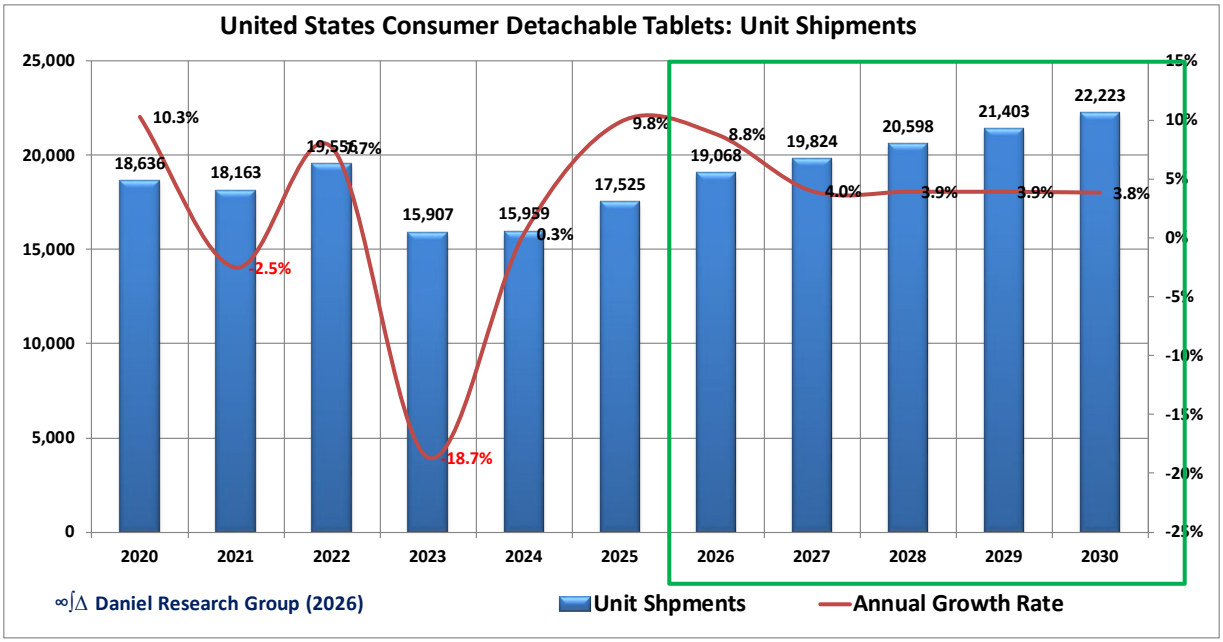

Consumer Total

United States Consumer Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	31,370	34,252	34,738	35,240	35,778	36,326	*1.5%*	
AGR	*-9.7%*	*9.2%*	*1.4%*	*1.4%*	*1.5%*	*1.5%*		
Revenue ($M)	13,907	18,012	19,080	20,210	21,210	22,253	*5.4%*	
AGR	*-1.8%*	*29.5%*	*5.9%*	*5.9%*	*4.9%*	*4.9%*		
Average Price ($)	443	526	549	573	593	613	*3.9%*	
AGR	*8.8%*	*18.6%*	*4.4%*	*4.4%*	*3.4%*	*3.3%*		
Installed Base (K)	159,560	154,220	150,025	146,912	144,633	143,478	*-1.8%*	
AGR	*-4.4%*	*-3.3%*	*-2.7%*	*-2.1%*	*-1.6%*	*-0.8%*		
Removal Age (Y)	5.56	5.55	5.51	5.43	5.37	5.20	*-1.6%*	
AGR	*5.2%*	*-0.1%*	*-0.8%*	*-1.5%*	*-1.0%*	*-3.2%*		
Average Installed Base Age (Y)	4.73	4.73	4.69	4.64	4.56	4.50	*-1.2%*	
AGR	*2.3%*	*-0.1%*	*-0.8%*	*-1.2%*	*-1.7%*	*-1.3%*		
Replacement Cycle Length (Y)	5.11	4.90	4.85	4.83	4.80	4.83	*-0.3%*	
AGR	*-2.3%*	*-4.3%*	*-0.9%*	*-0.5%*	*-0.6%*	*0.6%*		
Units per Households (#)	1.76	1.71	1.76	1.84	1.94	2.06	*4.8%*	
AGR	*-5.5%*	*-3.3%*	*3.0%*	*4.7%*	*5.7%*	*6.1%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*67.2%*	*66.8%*	*62.7%*	*58.2%*	*53.9%*	*50.2%*	*-17.0%*	
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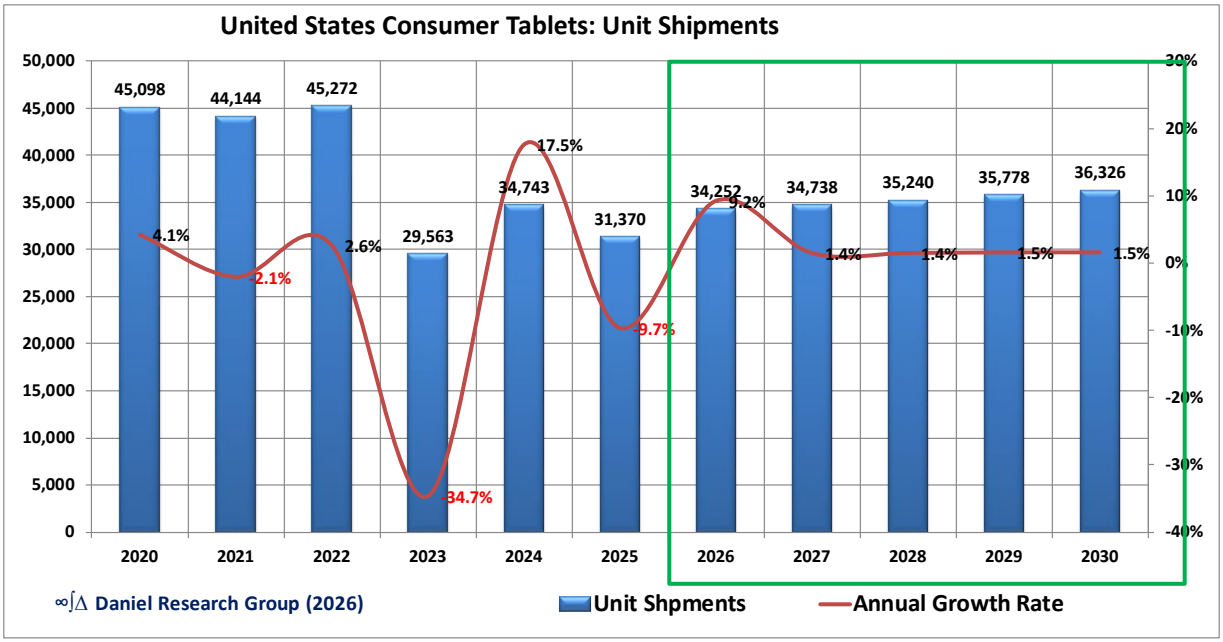

Enterprise Slate

United States Enterprise Slate Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	1,027	795	725	660	601	547	-8.9%	
AGR	-23.3%	-22.6%	-8.9%	-8.9%	-8.9%	-9.0%		
Revenue ($M)	377	324	304	285	265	246	-6.6%	
AGR	-29.6%	-14.1%	-6.1%	-6.2%	-7.1%	-7.2%		
Average Price ($)	367	407	420	432	441	450	2.5%	
AGR	-8.2%	11.0%	3.0%	3.0%	2.0%	2.0%		
Installed Base (K)	8,538	7,584	6,508	5,598	4,843	4,248	-13.5%	
AGR	-11.9%	-11.2%	-14.2%	-14.0%	-13.5%	-12.3%		
Removal Age (Y)	7.49	8.21	8.34	8.25	8.06	7.64	-1.8%	
AGR	6.8%	9.5%	1.6%	-1.1%	-2.3%	-5.3%		
Average Installed Base Age (Y)	6.06	6.16	6.15	6.12	6.10	6.17	0.0%	
AGR	2.4%	1.7%	-0.2%	-0.5%	-0.4%	1.1%		
Replacement Cycle Length (Y)	4.91	5.33	4.61	4.57	4.57	4.72	-3.0%	
AGR	-1.2%	8.5%	-13.5%	-1.0%	0.1%	3.2%		
Units per Businesses (#)	4.20	3.41	2.73	2.19	1.77	1.45	-19.3%	
AGR	-18.6%	-18.8%	-19.9%	-19.8%	-19.1%	-18.4%		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*32.4%*	*35.3%*	*38.3%*	*41.3%*	*44.4%*	*47.6%*	*15.2%*	
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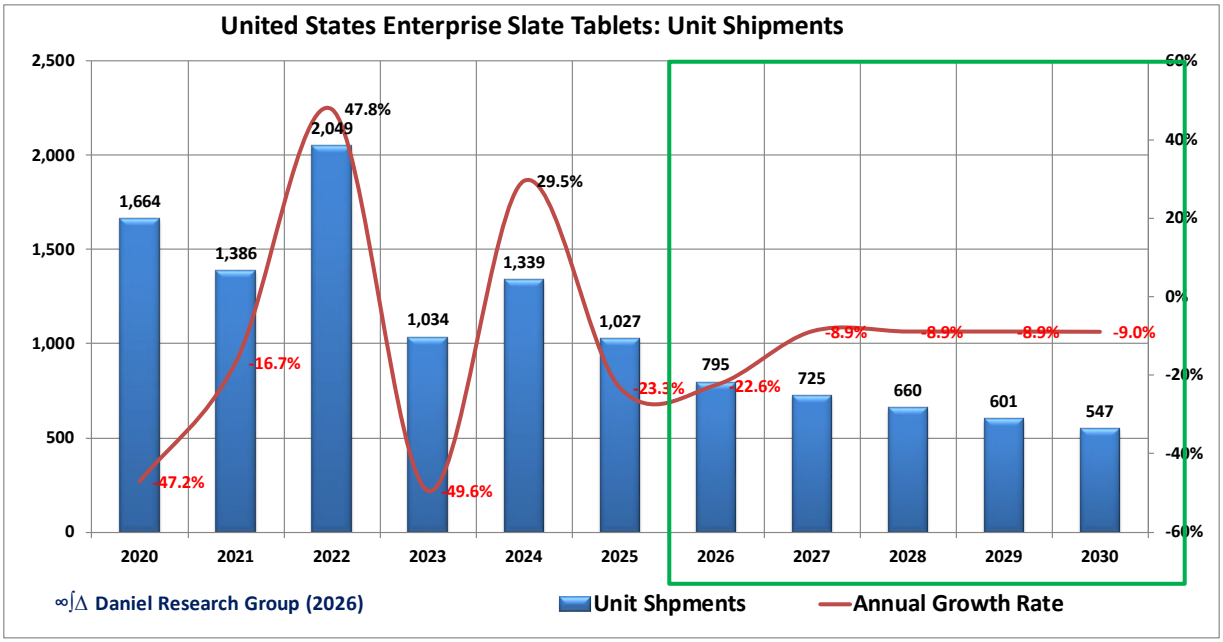

Enterprise Detachable

United States Enterprise Detachable Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	3,504	3,788	3,784	3,779	3,773	3,765	*-0.1%*	
AGR	*-7.2%*	*8.1%*	*-0.1%*	*-0.1%*	*-0.1%*	*-0.2%*		
Revenue ($M)	2,911	3,776	3,886	3,997	4,071	4,143	*2.3%*	
AGR	*0.8%*	*29.7%*	*2.9%*	*2.9%*	*1.9%*	*1.8%*		
Average Price ($)	831	997	1,027	1,058	1,079	1,100	*2.5%*	
AGR	*8.6%*	*20.0%*	*3.0%*	*3.0%*	*2.0%*	*2.0%*		
Installed Base (K)	11,244	11,493	11,759	11,944	12,062	12,127	*1.4%*	
AGR	*3.4%*	*2.2%*	*2.3%*	*1.6%*	*1.0%*	*0.5%*		
Removal Age (Y)	3.38	3.51	3.72	3.87	3.99	4.07	*3.8%*	
AGR	*11.0%*	*3.9%*	*6.0%*	*4.1%*	*3.0%*	*2.1%*		
Average Installed Base Age (Y)	3.64	3.79	3.89	3.97	4.02	4.06	*1.7%*	
AGR	*6.6%*	*4.1%*	*2.6%*	*1.9%*	*1.4%*	*1.0%*		
Replacement Cycle Length (Y)	4.59	4.25	4.34	4.32	4.30	4.28	*0.2%*	
AGR	*-0.8%*	*-7.5%*	*2.2%*	*-0.5%*	*-0.5%*	*-0.5%*		
Units per Businesses (#)	9.39	7.65	6.44	5.44	4.65	4.00	*-15.0%*	
AGR	*-17.4%*	*-18.6%*	*-15.8%*	*-15.5%*	*-14.5%*	*-14.0%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*19.1%*	*23.8%*	*29.3%*	*35.5%*	*42.2%*	*49.2%*	*30.1%*	
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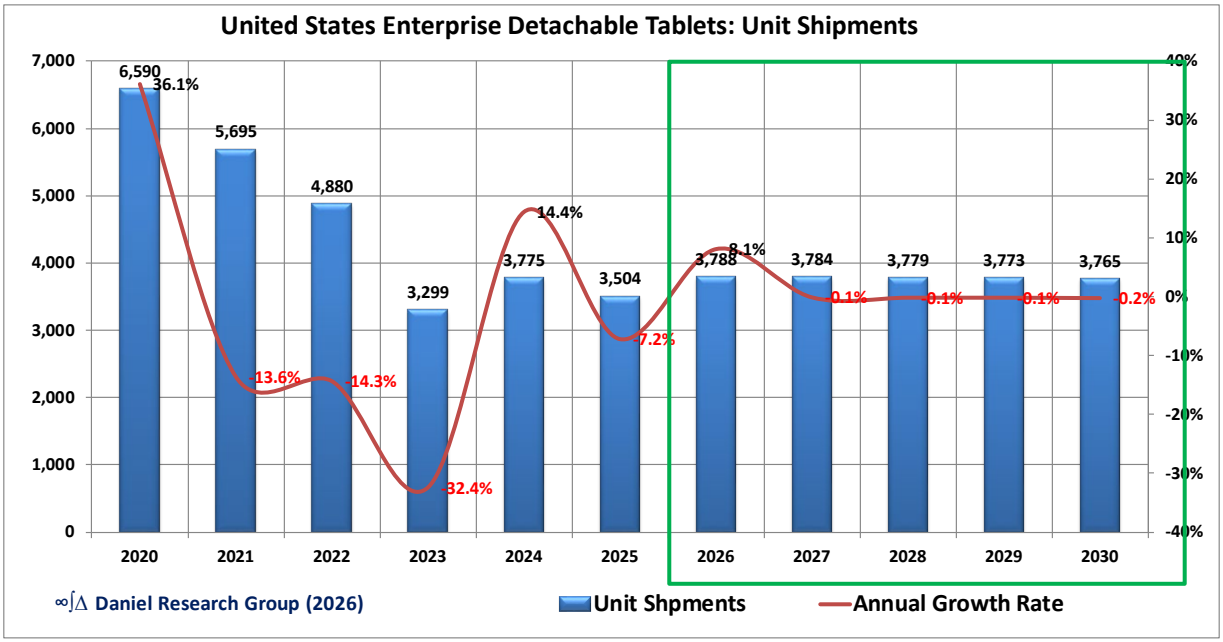

Enterprise Total

United States Enterprise Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	4,531	4,583	4,509	4,439	4,375	4,313	-1.5%	
AGR	-11.4%	1.1%	-1.6%	-1.6%	-1.4%	-1.4%		
Revenue ($M)	3,288	4,100	4,190	4,282	4,336	4,390	1.7%	
AGR	-3.9%	24.7%	2.2%	2.2%	1.3%	1.2%		
Average Price ($)	726	895	929	965	991	1,018	3.3%	
AGR	8.4%	23.3%	3.9%	3.8%	2.7%	2.7%		
Installed Base (K)	19,782	19,076	18,267	17,542	16,906	16,375	-3.7%	
AGR	-3.8%	-3.6%	-4.2%	-4.0%	-3.6%	-3.1%		
Removal Age (Y)	4.87	5.00	5.08	5.05	5.00	4.91	-0.5%	
AGR	5.8%	2.6%	1.5%	-0.5%	-1.0%	-1.8%		
Average Installed Base Age (Y)	4.50	4.55	4.57	4.56	4.55	4.54	-0.1%	
AGR	3.0%	1.3%	0.3%	-0.1%	-0.3%	-0.2%		
Replacement Cycle Length (Y)	4.72	4.61	4.43	4.40	4.37	4.38	-1.3%	
AGR	-1.2%	-2.5%	-3.7%	-0.8%	-0.5%	0.2%		
Units per Businesses (#)	7.10	6.41	5.86	5.36	4.94	4.55	-8.2%	
AGR	-9.0%	-9.8%	-8.6%	-8.5%	-7.9%	-8.0%		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	44.4%	47.2%	50.0%	52.9%	55.7%	58.4%	14.0%	
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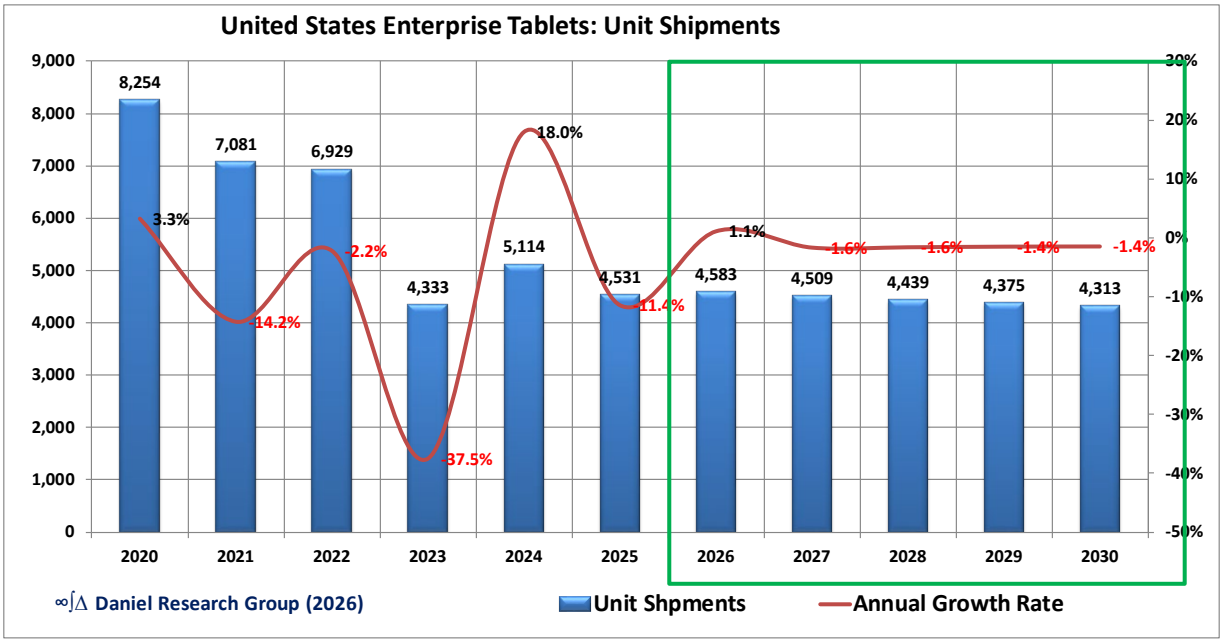

Total Slate

United States Consumer & Enterprise Slate Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	14,872	15,979	15,639	15,302	14,976	14,650	-2.1%	
AGR	-26.1%	7.4%	-2.1%	-2.2%	-2.1%	-2.2%		
Revenue ($M)	3,111	3,837	3,858	3,879	3,864	3,848	0.1%	
AGR	-23.2%	23.4%	0.6%	0.5%	-0.4%	-0.4%		
Average Price ($)	209	240	247	254	258	263	2.3%	
AGR	3.9%	14.8%	2.7%	2.8%	1.8%	1.8%		
Installed Base (K)	99,682	91,696	84,857	79,021	73,943	69,817	-6.6%	
AGR	-9.6%	-8.0%	-7.5%	-6.9%	-6.4%	-5.6%		
Removal Age (Y)	6.63	6.70	6.67	6.52	6.39	6.09	-2.4%	
AGR	7.6%	1.1%	-0.4%	-2.2%	-2.0%	-4.7%		
Average Installed Base Age (Y)	5.37	5.34	5.27	5.18	5.08	5.01	-1.6%	
AGR	2.3%	-0.4%	-1.4%	-1.7%	-2.1%	-1.4%		
Replacement Cycle Length (Y)	4.91	4.83	4.78	4.74	4.69	4.72	-0.6%	
AGR	-0.6%	-1.7%	-1.1%	-0.8%	-1.1%	0.7%		
Units per Households & Businesses (#)	1.25	1.15	1.06	1.04	1.03	1.02	-2.9%	
AGR	-10.9%	-8.3%	-7.7%	-1.7%	-1.0%	-1.0%		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	56.6%	56.4%	56.3%	53.0%	49.8%	47.3%	-9.3%	
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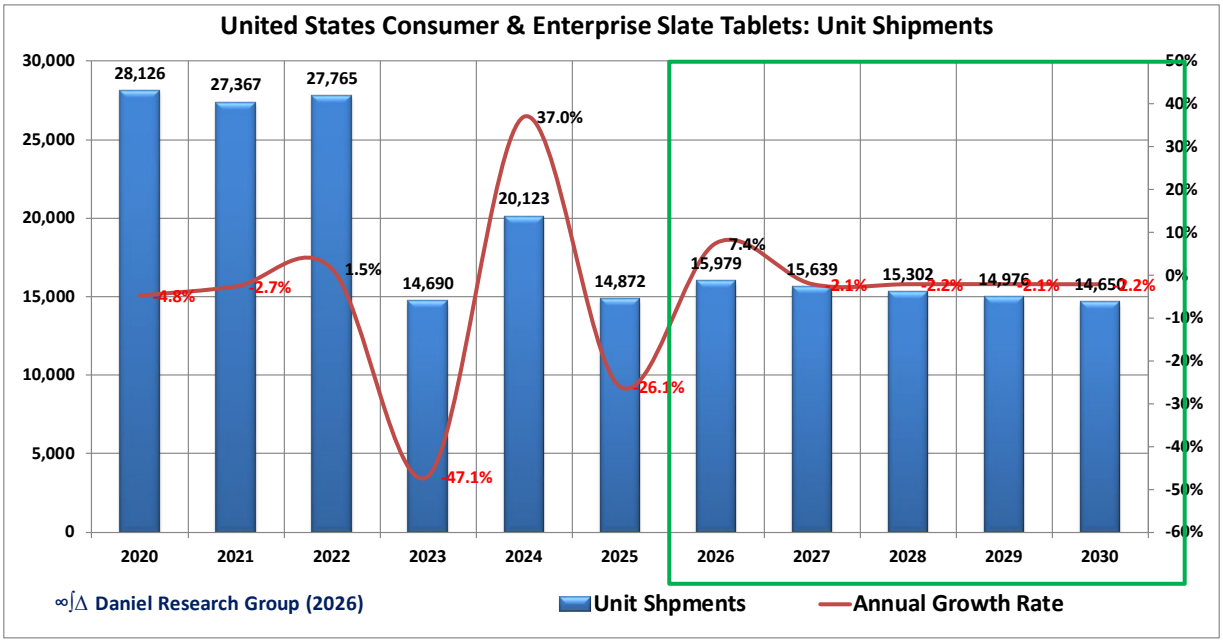

Total Detachable

United States Consumer & Enterprise Detachable Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	21,029	22,856	23,608	24,377	25,176	25,989	3.3%	
AGR	*6.6%*	*8.7%*	*3.3%*	*3.3%*	*3.3%*	*3.2%*		
Revenue ($M)	14,084	18,275	19,412	20,613	21,681	22,795	5.7%	
AGR	*4.1%*	*29.8%*	*6.2%*	*6.2%*	*5.2%*	*5.1%*		
Average Price ($)	670	800	822	846	861	877	2.3%	
AGR	*-2.3%*	*19.4%*	*2.8%*	*2.8%*	*1.8%*	*1.8%*		
Installed Base (K)	79,660	81,601	83,435	85,434	87,595	90,036	2.5%	
AGR	*3.1%*	*2.4%*	*2.2%*	*2.4%*	*2.5%*	*2.8%*		
Removal Age (Y)	3.89	4.05	4.19	4.31	4.41	4.43	2.3%	
AGR	*6.8%*	*4.0%*	*3.4%*	*3.0%*	*2.3%*	*0.5%*		
Average Installed Base Age (Y)	3.90	4.02	4.10	4.14	4.14	4.13	0.7%	
AGR	*5.8%*	*3.2%*	*2.0%*	*0.9%*	*0.0%*	*-0.2%*		
Replacement Cycle Length (Y)	5.28	4.90	4.83	4.82	4.81	4.82	-0.4%	
AGR	*-5.4%*	*-7.2%*	*-1.4%*	*-0.3%*	*-0.2%*	*0.4%*		
Units per Households & Businesses (#)	3.43	3.51	3.60	3.67	3.76	3.85	2.3%	
AGR	*2.5%*	*2.6%*	*2.3%*	*2.2%*	*2.3%*	*2.4%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*16.5%*	*16.4%*	*16.3%*	*16.2%*	*16.2%*	*16.1%*	*-0.4%*	
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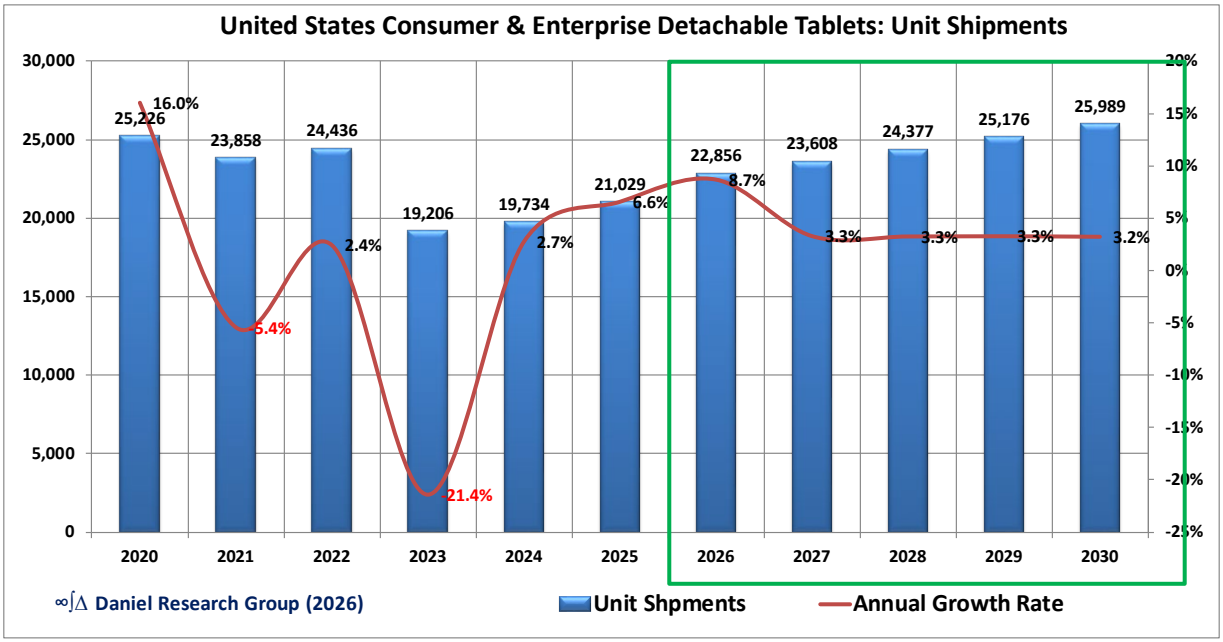

Total Tablets

United States Consumer & Enterprise Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	35,901	38,835	39,248	39,680	40,153	40,639	*1.1%*	
AGR	*-9.9%*	*8.2%*	*1.1%*	*1.1%*	*1.2%*	*1.2%*		
Revenue ($M)	17,195	22,112	23,270	24,492	25,546	26,642	*4.8%*	
AGR	*-2.2%*	*28.6%*	*5.2%*	*5.3%*	*4.3%*	*4.3%*		
Average Price ($)	479	569	593	617	636	656	*3.6%*	
AGR	*8.6%*	*18.9%*	*4.1%*	*4.1%*	*3.1%*	*3.0%*		
Installed Base (K)	179,342	173,297	168,292	164,454	161,538	159,853	*-2.0%*	
AGR	*-4.4%*	*-3.4%*	*-2.9%*	*-2.3%*	*-1.8%*	*-1.0%*		
Removal Age (Y)	5.46	5.47	5.45	5.38	5.32	5.16	*-1.5%*	
AGR	*5.2%*	*0.2%*	*-0.4%*	*-1.3%*	*-1.0%*	*-3.0%*		
Average Installed Base Age (Y)	4.70	4.71	4.68	4.63	4.56	4.51	*-1.1%*	
AGR	*2.5%*	*0.1%*	*-0.6%*	*-1.1%*	*-1.5%*	*-1.2%*		
Replacement Cycle Length (Y)	5.07	4.86	4.80	4.78	4.75	4.78	*-0.4%*	
AGR	*-2.2%*	*-4.1%*	*-1.2%*	*-0.5%*	*-0.6%*	*0.6%*		
Units per Households & Businesses (#)	1.92	1.85	1.90	1.98	2.07	2.18	*4.2%*	
AGR	*-5.6%*	*-3.6%*	*2.4%*	*4.0%*	*4.9%*	*5.2%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*66.2%*	*65.9%*	*62.2%*	*58.0%*	*54.0%*	*50.5%*	*-15.6%*	
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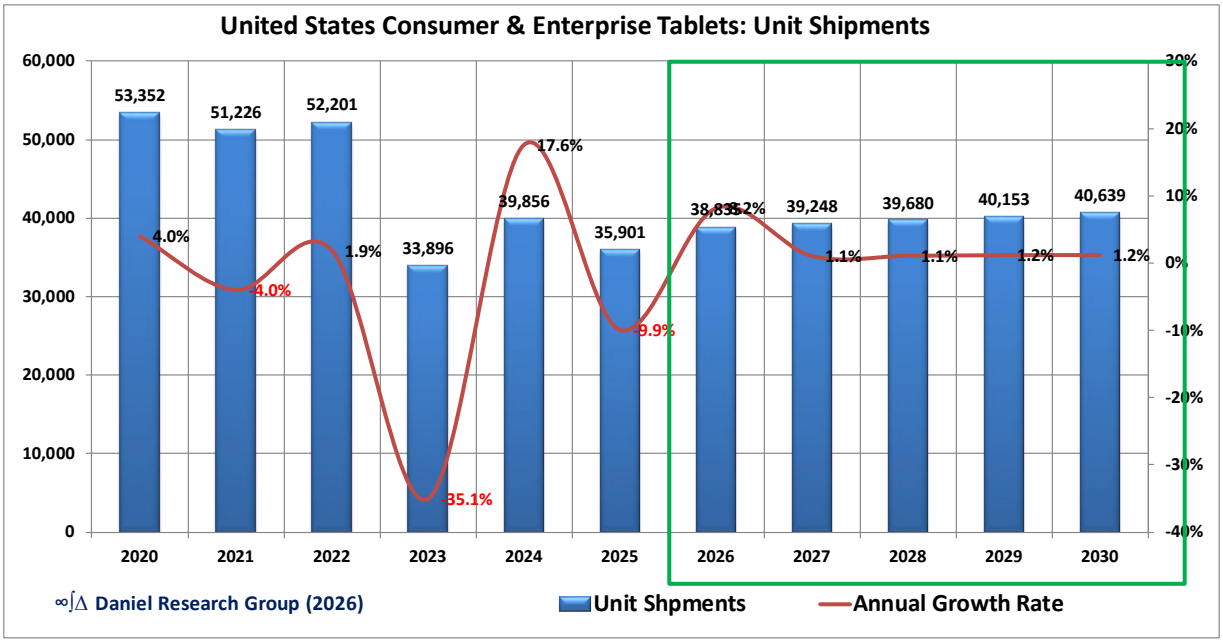

Mobile Phones

Consumer Standard

United States Consumer Standard Phones								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	4,189	3,470	3,506	3,540	3,575	3,607	*1.0%*	
AGR	*-5.6%*	*-17.2%*	*1.0%*	*1.0%*	*1.0%*	*0.9%*		
Revenue ($M)	279	245	239	234	228	223	*-2.3%*	
AGR	*1.1%*	*-12.2%*	*-2.3%*	*-2.3%*	*-2.3%*	*-2.4%*		
Average Price ($)	67	71	68	66	64	62	*-3.3%*	
AGR	*7.0%*	*6.0%*	*-3.3%*	*-3.3%*	*-3.3%*	*-3.3%*		
Installed Base (K)	54,317	43,321	36,103	31,648	27,350	24,335	*-13.4%*	
AGR	*-22.5%*	*-20.2%*	*-16.7%*	*-12.3%*	*-13.6%*	*-11.0%*		
Removal Age (Y)	12.42	12.20	11.50	10.51	10.59	9.80	*-5.3%*	
AGR	*-1.3%*	*-1.7%*	*-5.8%*	*-8.6%*	*0.7%*	*-7.4%*		
Average Installed Base Age (Y)	9.10	8.67	8.28	8.04	7.55	7.09	*-4.9%*	
AGR	*-4.5%*	*-4.7%*	*-4.5%*	*-2.9%*	*-6.2%*	*-6.1%*		
Replacement Cycle Length (Y)	3.72	3.99	4.37	4.96	4.47	4.67	*4.0%*	
AGR	*-3.0%*	*7.3%*	*9.3%*	*13.6%*	*-9.8%*	*4.5%*		
Units per Households (#)	4.19	4.00	4.00	4.21	4.38	4.72	*4.2%*	
AGR	*-8.7%*	*-4.6%*	*0.0%*	*5.3%*	*4.2%*	*7.5%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*9.6%*	*8.0%*	*6.6%*	*5.5%*	*4.5%*	*3.7%*	*-5.9%*	
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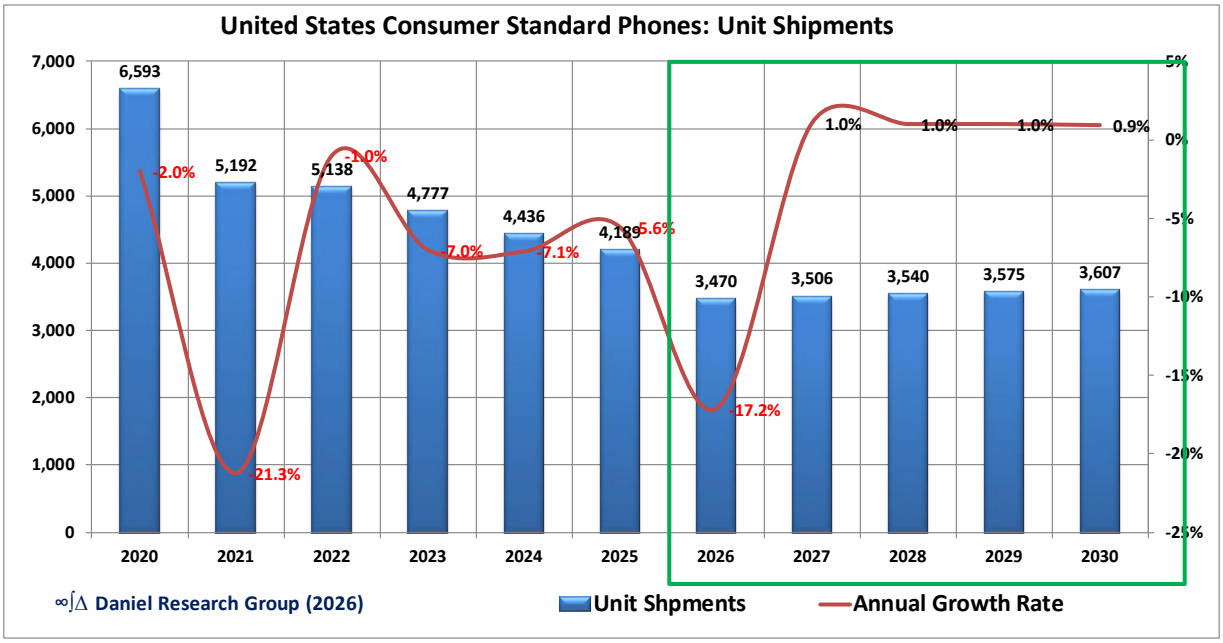

Enterprise Standard

United States Enterprise Standard Phones								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	120	84	88	93	98	103	5.4%	
AGR	*-5.6%*	*-30.2%*	*5.5%*	*5.4%*	*5.4%*	*5.3%*		
Revenue ($M)	12	9	9	9	9	9	0.6%	
AGR	*-9.8%*	*-24.6%*	*0.7%*	*0.6%*	*0.6%*	*0.5%*		
Average Price ($)	96	104	99	95	90	86	-4.6%	
AGR	*-4.5%*	*8.0%*	*-4.6%*	*-4.6%*	*-4.6%*	*-4.6%*		
Installed Base (K)	3,465	2,400	1,255	862	690	647	-27.9%	
AGR	*-24.8%*	*-30.7%*	*-47.7%*	*-31.3%*	*-19.9%*	*-6.2%*		
Removal Age (Y)	13.32	13.83	14.19	13.13	11.56	8.08	-12.6%	
AGR	*-3.9%*	*3.8%*	*2.6%*	*-7.5%*	*-12.0%*	*-30.1%*		
Average Installed Base Age (Y)	11.41	11.33	9.70	8.28	7.21	7.09	-11.1%	
AGR	*1.8%*	*-0.7%*	*-14.4%*	*-14.6%*	*-12.9%*	*-1.7%*		
Replacement Cycle Length (Y)	3.74	3.09	2.02	2.77	3.56	5.41	15.1%	
AGR	*30.7%*	*-17.5%*	*-34.7%*	*37.5%*	*28.2%*	*52.3%*		
Units per Businesses (#)	30.77	29.29	21.45	20.55	22.96	29.78	0.4%	
AGR	*4.7%*	*-4.8%*	*-26.8%*	*-4.2%*	*11.7%*	*29.7%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*1.8%*	*1.3%*	*0.9%*	*0.7%*	*0.5%*	*0.4%*	-1.4%	
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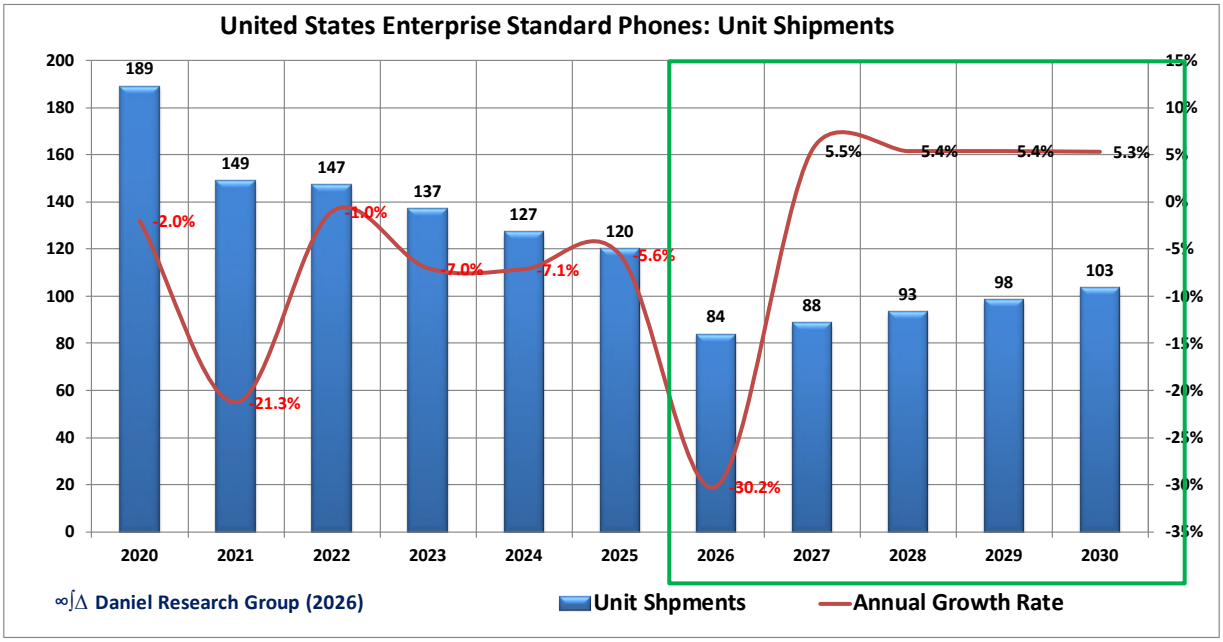

Total Standard

United States Consumer & Enterprise Standard Phones								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	4,309	3,554	3,594	3,633	3,673	3,711	*1.1%*	
AGR	*-5.6%*	*-17.5%*	*1.1%*	*1.1%*	*1.1%*	*1.0%*		
Revenue ($M)	290	253	248	242	237	232	*-2.2%*	
AGR	*0.6%*	*-12.7%*	*-2.2%*	*-2.2%*	*-2.2%*	*-2.3%*		
Average Price ($)	67	71	69	67	65	62	*-3.3%*	
AGR	*6.5%*	*5.9%*	*-3.3%*	*-3.3%*	*-3.3%*	*-3.3%*		
Installed Base (K)	57,782	45,721	37,358	32,510	28,040	24,982	*-14.0%*	
AGR	*-22.6%*	*-20.9%*	*-18.3%*	*-13.0%*	*-13.7%*	*-10.9%*		
Removal Age (Y)	12.47	12.33	11.82	10.67	10.61	9.74	*-5.7%*	
AGR	*-1.9%*	*-1.1%*	*-4.1%*	*-9.7%*	*-0.6%*	*-8.2%*		
Average Installed Base Age (Y)	9.24	8.81	8.32	8.04	7.53	7.09	*-5.3%*	
AGR	*-4.1%*	*-4.6%*	*-5.6%*	*-3.4%*	*-6.3%*	*-5.9%*		
Replacement Cycle Length (Y)	3.72	3.93	4.12	4.83	4.44	4.69	*4.5%*	
AGR	*-0.7%*	*5.5%*	*5.0%*	*17.2%*	*-8.1%*	*5.6%*		
Units per Households & Businesses (#)	4.42	4.19	4.11	4.30	4.47	4.82	*3.6%*	
AGR	*-8.7%*	*-5.3%*	*-1.9%*	*4.6%*	*4.1%*	*7.7%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*9.3%*	*7.7%*	*6.4%*	*5.3%*	*4.3%*	*3.6%*	*-5.7%*	
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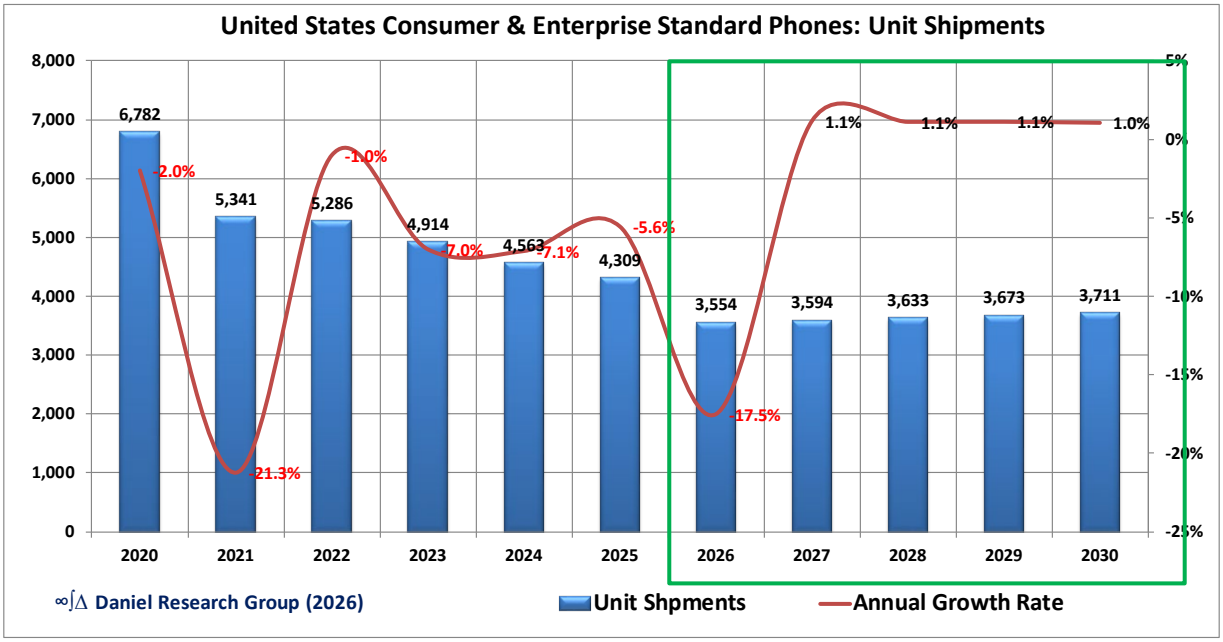

Consumer Smartphone

United States Consumer SmartPhones								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	121,531	114,524	117,357	120,193	123,097	125,985	*2.4%*	
AGR	*4.4%*	*-5.8%*	*2.5%*	*2.4%*	*2.4%*	*2.3%*		
Revenue ($M)	99,694	104,281	105,576	106,828	108,095	109,302	*1.2%*	
AGR	*7.6%*	*4.6%*	*1.2%*	*1.2%*	*1.2%*	*1.1%*		
Average Price ($)	820	911	900	889	878	868	*-1.2%*	
AGR	*3.1%*	*11.0%*	*-1.2%*	*-1.2%*	*-1.2%*	*-1.2%*		
Installed Base (K)	526,163	523,668	521,164	516,040	511,671	506,956	*-0.8%*	
AGR	*0.0%*	*-0.5%*	*-0.5%*	*-1.0%*	*-0.8%*	*-0.9%*		
Removal Age (Y)	4.90	5.35	5.37	5.58	5.50	5.49	*0.6%*	
AGR	*8.2%*	*9.1%*	*0.4%*	*3.9%*	*-1.4%*	*-0.3%*		
Average Installed Base Age (Y)	5.97	6.03	6.05	6.00	5.93	5.83	*-0.8%*	
AGR	*1.7%*	*0.9%*	*0.4%*	*-0.9%*	*-1.2%*	*-1.7%*		
Replacement Cycle Length (Y)	5.32	5.48	5.35	5.12	5.01	4.88	*-2.8%*	
AGR	*-4.7%*	*2.9%*	*-2.3%*	*-4.3%*	*-2.0%*	*-2.7%*		
Units per Households (#)	4.10	4.01	3.94	3.85	3.78	3.71	*-2.0%*	
AGR	*-3.0%*	*-2.1%*	*-1.9%*	*-2.3%*	*-1.9%*	*-1.8%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*95.4%*	*96.3%*	*97.1%*	*97.7%*	*98.2%*	*98.6%*	*3.2%*	
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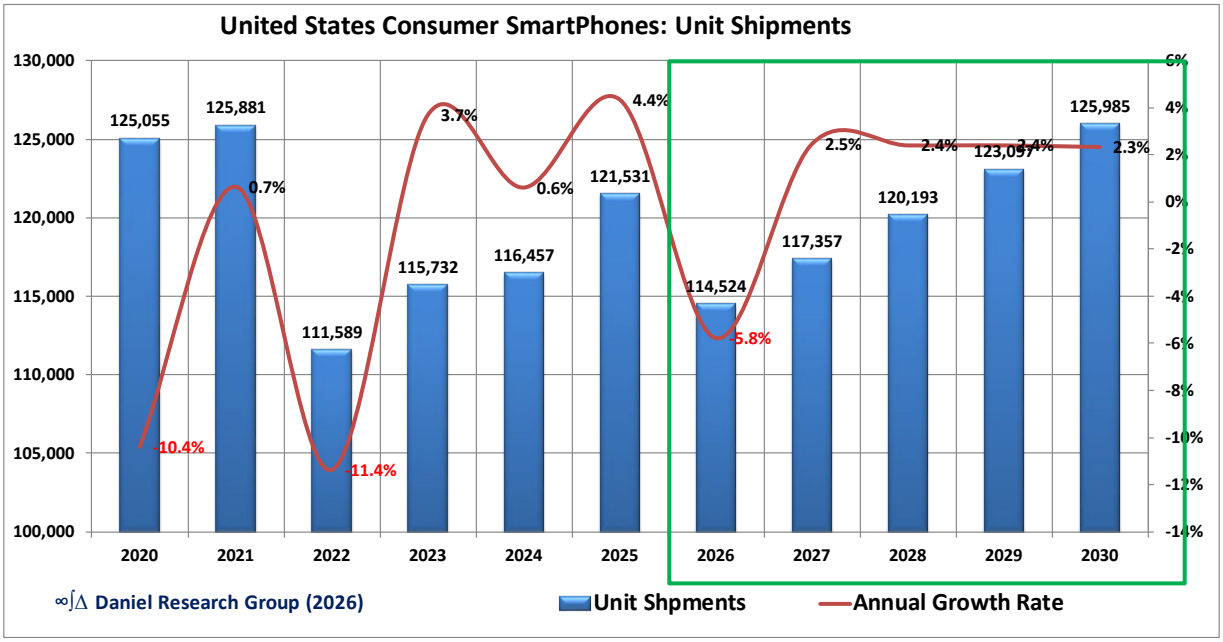

Enterprise Smartphone

United States Enterprise SmartPhones								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	12,399	12,390	12,428	12,458	12,489	12,511	0.2%	
AGR	*6.8%*	*-0.1%*	*0.3%*	*0.2%*	*0.2%*	*0.2%*		
Revenue ($M)	10,909	11,991	12,161	12,326	12,493	12,654	1.4%	
AGR	*5.5%*	*9.9%*	*1.4%*	*1.4%*	*1.4%*	*1.3%*		
Average Price ($)	880	968	979	989	1,000	1,011	1.1%	
AGR	*-1.2%*	*10.0%*	*1.1%*	*1.1%*	*1.1%*	*1.1%*		
Installed Base (K)	45,874	45,363	45,152	45,365	45,599	45,741	0.2%	
AGR	*-1.6%*	*-1.1%*	*-0.5%*	*0.5%*	*0.5%*	*0.3%*		
Removal Age (Y)	5.47	5.23	5.00	4.66	4.63	4.71	-2.6%	
AGR	*-10.3%*	*-4.4%*	*-4.3%*	*-7.0%*	*-0.5%*	*1.6%*		
Average Installed Base Age (Y)	5.84	5.70	5.60	5.59	5.59	5.57	-0.6%	
AGR	*-3.0%*	*-2.4%*	*-1.7%*	*-0.2%*	*-0.1%*	*-0.4%*		
Replacement Cycle Length (Y)	4.49	4.52	4.57	4.70	4.72	4.70	1.0%	
AGR	*0.8%*	*0.6%*	*1.2%*	*2.9%*	*0.3%*	*-0.5%*		
Units per Businesses (#)	72.02	85.37	103.99	127.56	156.82	191.03	22.3%	
AGR	*19.2%*	*18.5%*	*21.8%*	*22.7%*	*22.9%*	*21.8%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*10.2%*	*8.4%*	*7.0%*	*5.7%*	*4.7%*	*3.9%*	-6.3%	
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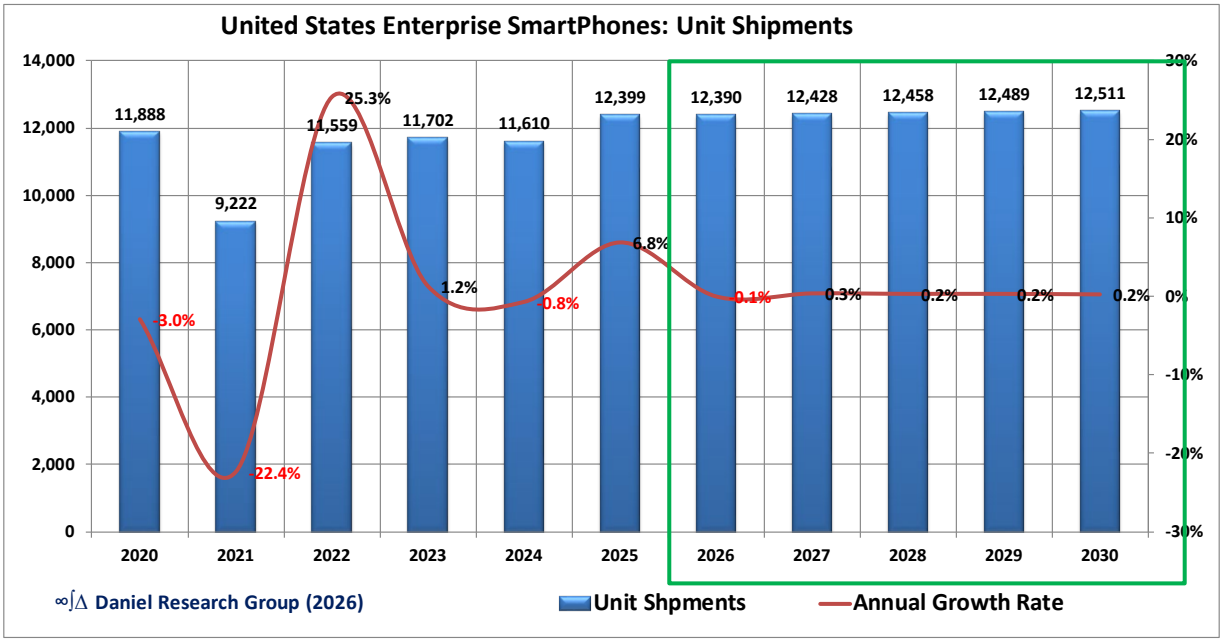

Total Smartphone

United States Consumer & Enterprise SmartPhones								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	133,930	126,915	129,785	132,651	135,587	138,497	2.2%	
AGR	*4.6%*	*-5.2%*	*2.3%*	*2.2%*	*2.2%*	*2.1%*		
Revenue ($M)	110,604	116,272	117,737	119,154	120,588	121,955	1.2%	
AGR	*7.4%*	*5.1%*	*1.3%*	*1.2%*	*1.2%*	*1.1%*		
Average Price ($)	826	916	907	898	889	881	-1.0%	
AGR	*2.7%*	*10.9%*	*-1.0%*	*-1.0%*	*-1.0%*	*-1.0%*		
Installed Base (K)	572,037	569,030	566,316	561,406	557,270	552,697	-0.7%	
AGR	*-0.2%*	*-0.5%*	*-0.5%*	*-0.9%*	*-0.7%*	*-0.8%*		
Removal Age (Y)	4.96	5.34	5.34	5.50	5.42	5.42	0.3%	
AGR	*5.5%*	*7.7%*	*0.0%*	*2.9%*	*-1.3%*	*-0.1%*		
Average Installed Base Age (Y)	5.96	6.00	6.01	5.96	5.90	5.80	-0.8%	
AGR	*1.3%*	*0.7%*	*0.2%*	*-0.8%*	*-1.1%*	*-1.6%*		
Replacement Cycle Length (Y)	5.24	5.38	5.27	5.08	4.99	4.86	-2.5%	
AGR	*-4.1%*	*2.7%*	*-2.0%*	*-3.7%*	*-1.8%*	*-2.5%*		
Units per Households & Businesses (#)	4.43	4.34	4.27	4.18	4.10	4.04	-1.8%	
AGR	*-3.0%*	*-2.0%*	*-1.8%*	*-2.1%*	*-1.7%*	*-1.7%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*91.6%*	*92.4%*	*93.1%*	*93.7%*	*94.2%*	*94.5%*	*2.9%*	
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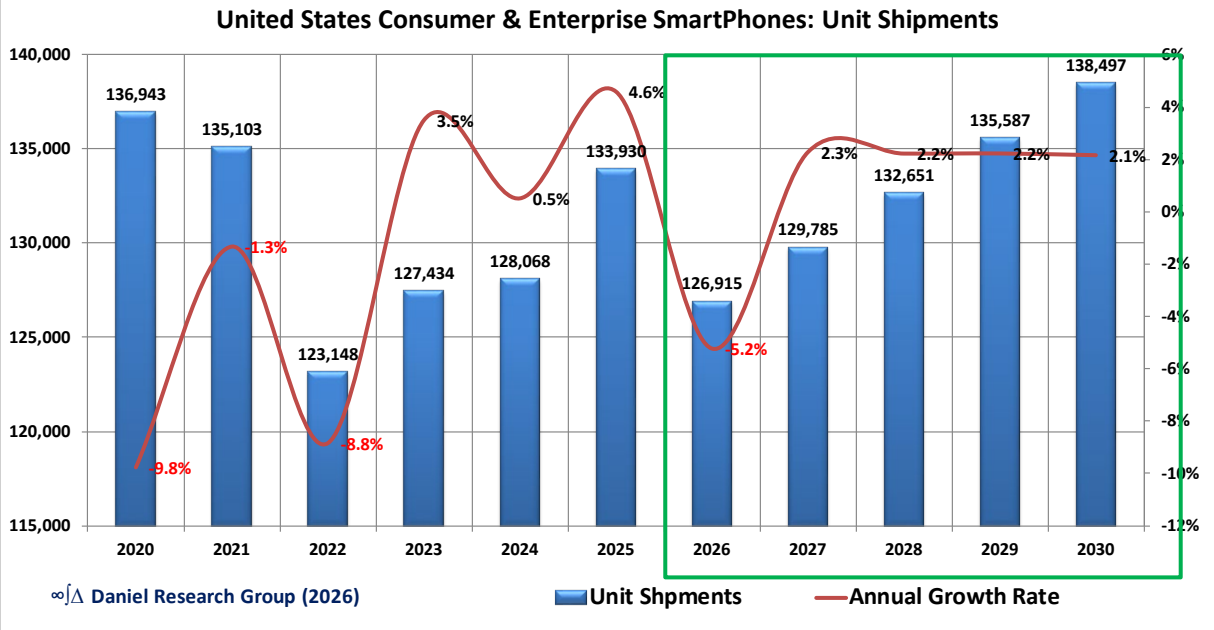

Consumer Total

United States Consumer Mobile Phones								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	125,719	117,994	120,863	123,733	126,672	129,593	*2.4%*	
AGR	*4.0%*	*-6.1%*	*2.4%*	*2.4%*	*2.4%*	*2.3%*		
Revenue ($M)	99,973	104,526	105,815	107,061	108,323	109,524	*1.2%*	
AGR	*7.5%*	*4.6%*	*1.2%*	*1.2%*	*1.2%*	*1.1%*		
Average Price ($)	795	886	876	865	855	845	*-1.2%*	
AGR	*3.4%*	*11.4%*	*-1.2%*	*-1.2%*	*-1.2%*	*-1.2%*		
Installed Base (K)	580,479	566,989	557,267	547,688	539,021	531,290	*-1.6%*	
AGR	*-2.7%*	*-2.3%*	*-1.7%*	*-1.7%*	*-1.6%*	*-1.4%*		
Removal Age (Y)	5.88	6.06	5.90	5.94	5.82	5.71	*-1.5%*	
AGR	*1.0%*	*3.2%*	*-2.7%*	*0.8%*	*-2.0%*	*-1.9%*		
Average Installed Base Age (Y)	6.28	6.26	6.22	6.12	6.01	5.88	*-1.5%*	
AGR	*-0.3%*	*-0.4%*	*-0.6%*	*-1.5%*	*-1.8%*	*-2.2%*		
Replacement Cycle Length (Y)	5.10	5.31	5.27	5.11	4.98	4.87	*-2.2%*	
AGR	*-3.4%*	*4.2%*	*-0.8%*	*-3.0%*	*-2.5%*	*-2.3%*		
Units per Households (#)	4.33	4.20	4.10	4.00	3.91	3.83	*-2.3%*	
AGR	*-4.6%*	*-3.1%*	*-2.4%*	*-2.5%*	*-2.2%*	*-2.0%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*99.6%*	*99.7%*	*99.8%*	*99.9%*	*99.9%*	*99.9%*	*0.3%*	
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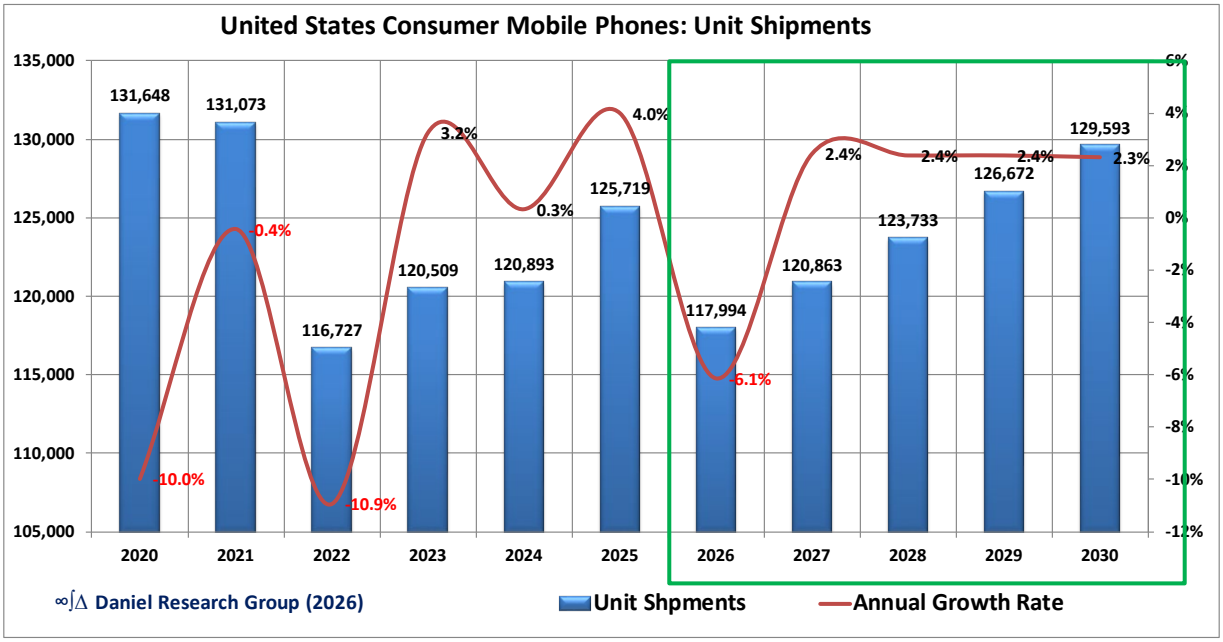

Enterprise Total

United States Enterprise Mobile Phones								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	12,520	12,474	12,516	12,552	12,587	12,615	*0.3%*	
AGR	*6.7%*	*-0.4%*	*0.3%*	*0.3%*	*0.3%*	*0.2%*		
Revenue ($M)	10,921	12,000	12,169	12,334	12,502	12,663	*1.4%*	
AGR	*5.4%*	*9.9%*	*1.4%*	*1.4%*	*1.4%*	*1.3%*		
Average Price ($)	872	962	972	983	993	1,004	*1.1%*	
AGR	*-1.1%*	*10.3%*	*1.1%*	*1.1%*	*1.1%*	*1.1%*		
Installed Base (K)	49,339	47,762	46,407	46,227	46,290	46,388	*-0.7%*	
AGR	*-3.7%*	*-3.2%*	*-2.8%*	*-0.4%*	*0.1%*	*0.2%*		
Removal Age (Y)	6.18	5.90	5.73	4.98	4.81	4.78	*-5.1%*	
AGR	*-14.4%*	*-4.5%*	*-2.9%*	*-13.1%*	*-3.4%*	*-0.6%*		
Average Installed Base Age (Y)	6.21	5.98	5.74	5.66	5.62	5.59	*-1.7%*	
AGR	*-4.1%*	*-3.8%*	*-4.0%*	*-1.3%*	*-0.7%*	*-0.6%*		
Replacement Cycle Length (Y)	4.42	4.40	4.35	4.63	4.70	4.71	*1.7%*	
AGR	*5.2%*	*-0.6%*	*-1.2%*	*6.6%*	*1.4%*	*0.2%*		
Units per Businesses (#)	72.85	83.46	97.85	117.01	140.46	166.90	*18.9%*	
AGR	*17.9%*	*14.6%*	*17.2%*	*19.6%*	*20.0%*	*18.8%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*10.8%*	*9.1%*	*7.6%*	*6.4%*	*5.4%*	*4.5%*	*-6.3%*	
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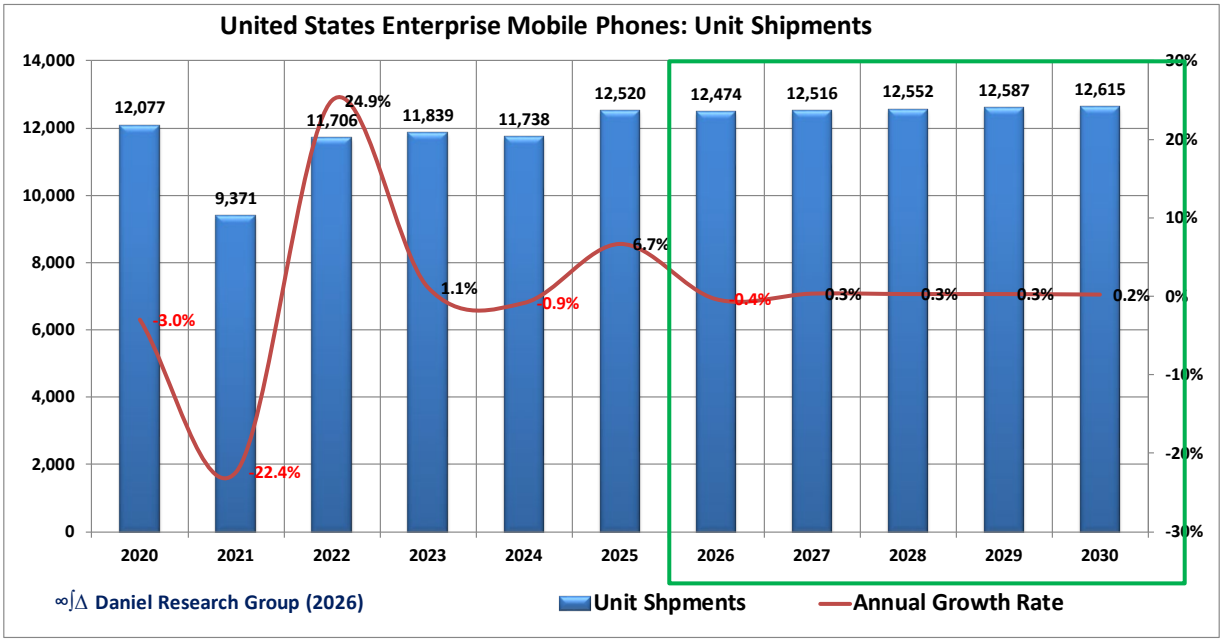

Total Mobile Phones

United States Consumer & Enterprise Mobile Phones								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	138,239	130,468	133,379	136,284	139,259	142,207	2.2%	
AGR	*4.2%*	*-5.6%*	*2.2%*	*2.2%*	*2.2%*	*2.1%*		
Revenue ($M)	110,894	116,526	117,985	119,396	120,825	122,187	1.2%	
AGR	*7.3%*	*5.1%*	*1.3%*	*1.2%*	*1.2%*	*1.1%*		
Average Price ($)	802	893	885	876	868	859	-1.0%	
AGR	*3.0%*	*11.3%*	*-1.0%*	*-1.0%*	*-1.0%*	*-1.0%*		
Installed Base (K)	629,818	614,751	603,674	593,916	585,310	577,679	-1.5%	
AGR	*-2.8%*	*-2.4%*	*-1.8%*	*-1.6%*	*-1.4%*	*-1.3%*		
Removal Age (Y)	5.91	6.05	5.89	5.86	5.73	5.63	-1.8%	
AGR	*-1.1%*	*2.4%*	*-2.7%*	*-0.5%*	*-2.1%*	*-1.8%*		
Average Installed Base Age (Y)	6.27	6.23	6.18	6.09	5.98	5.86	-1.5%	
AGR	*-0.6%*	*-0.7%*	*-0.9%*	*-1.5%*	*-1.7%*	*-2.0%*		
Replacement Cycle Length (Y)	5.03	5.22	5.18	5.07	4.96	4.86	-1.8%	
AGR	*-2.5%*	*3.8%*	*-0.9%*	*-2.2%*	*-2.1%*	*-2.1%*		
Units per Households & Businesses (#)	4.47	4.34	4.24	4.14	4.06	3.99	-2.1%	
AGR	*-4.4%*	*-3.0%*	*-2.3%*	*-2.3%*	*-1.9%*	*-1.8%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*0.0%*	
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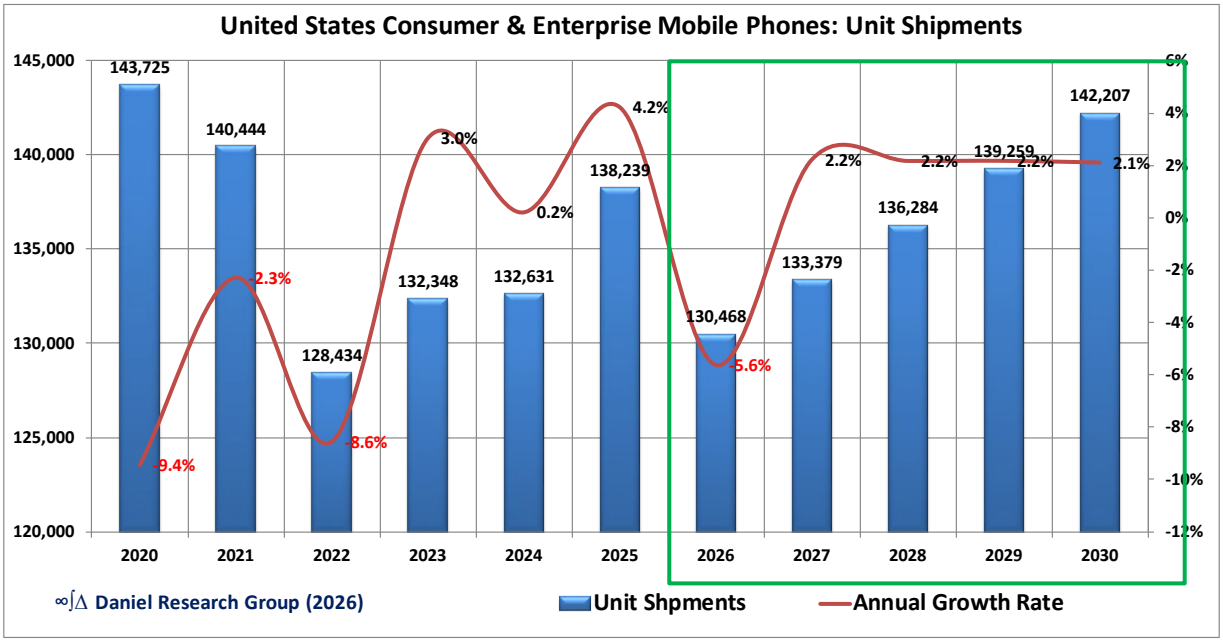

Market Aggregations
Total PCs (Desktop and Mobile)
Consumer PCs

United States Consumer Total PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	31,194	31,122	31,555	31,984	32,427	32,862	*1.4%*	
AGR	*12.7%*	*-0.2%*	*1.4%*	*1.4%*	*1.4%*	*1.3%*		
Revenue ($M)	37,865	44,480	46,433	48,458	50,093	51,761	*3.9%*	
AGR	*15.2%*	*17.5%*	*4.4%*	*4.4%*	*3.4%*	*3.3%*		
Average Price ($)	1,214	1,429	1,471	1,515	1,545	1,575	*2.5%*	
AGR	*2.2%*	*17.7%*	*3.0%*	*3.0%*	*2.0%*	*2.0%*		
Installed Base (K)	117,755	116,413	116,622	117,045	117,649	118,650	*0.5%*	
AGR	*0.7%*	*-1.1%*	*0.2%*	*0.4%*	*0.5%*	*0.9%*		
Removal Age (Y)	4.72	4.70	4.76	4.76	4.75	4.68	*-0.1%*	
AGR	*-0.9%*	*-0.5%*	*1.2%*	*0.0%*	*-0.1%*	*-1.5%*		
Average Installed Base Age (Y)	4.32	4.34	4.32	4.30	4.26	4.23	*-0.6%*	
AGR	*0.2%*	*0.4%*	*-0.4%*	*-0.7%*	*-0.9%*	*-0.6%*		
Replacement Cycle Length (Y)	4.88	4.59	4.72	4.71	4.70	4.72	*0.7%*	
AGR	*-2.9%*	*-6.0%*	*2.9%*	*-0.3%*	*-0.2%*	*0.6%*		
Units per Households (#)	1.11	1.07	1.04	1.02	1.01	1.00	*-1.6%*	
AGR	*-3.1%*	*-3.7%*	*-2.2%*	*-2.0%*	*-1.6%*	*-0.5%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*79.0%*	*80.6%*	*82.1%*	*83.5%*	*84.8%*	*85.5%*	*6.5%*	
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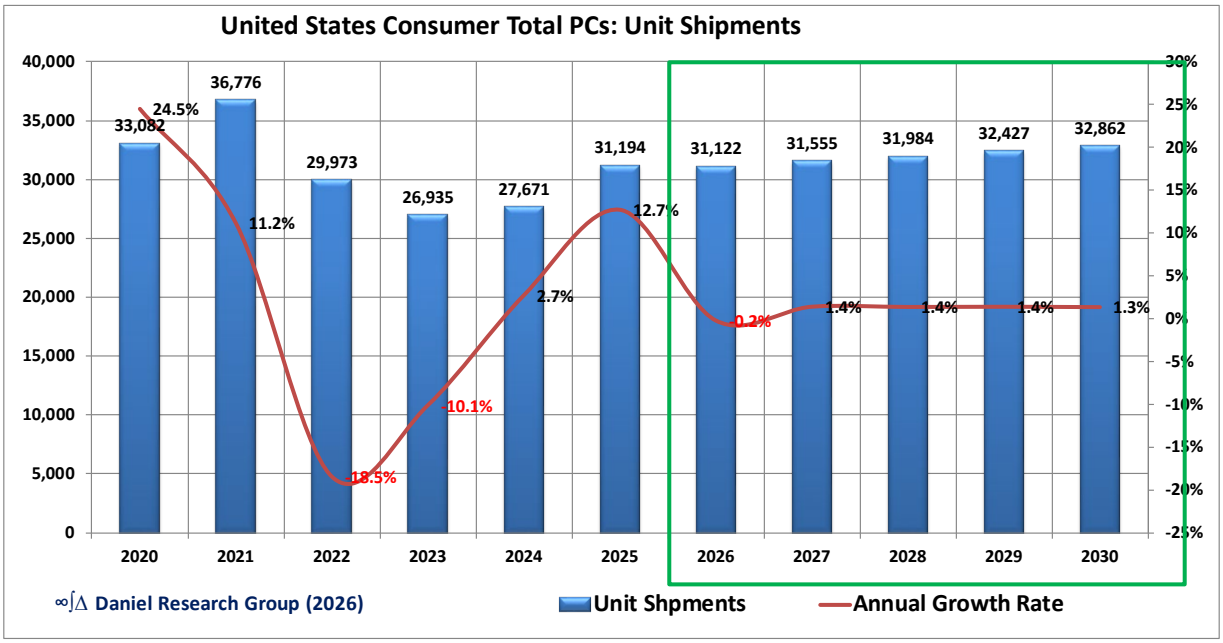

Enterprise PCs

United States Enterprise Total PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	37,996	37,606	38,025	38,432	38,849	39,247	*1.1%*	
AGR	*-1.4%*	*-1.0%*	*1.1%*	*1.1%*	*1.1%*	*1.0%*		
Revenue ($M)	31,649	38,472	40,074	41,723	43,024	44,339	*3.6%*	
AGR	*10.6%*	*21.6%*	*4.2%*	*4.1%*	*3.1%*	*3.1%*		
Average Price ($)	833	1,023	1,054	1,086	1,107	1,130	*2.5%*	
AGR	*12.1%*	*22.8%*	*3.0%*	*3.0%*	*2.0%*	*2.0%*		
Installed Base (K)	141,203	142,637	143,446	144,018	144,491	144,887	*0.4%*	
AGR	*1.3%*	*1.0%*	*0.6%*	*0.4%*	*0.3%*	*0.3%*		
Removal Age (Y)	4.53	4.61	4.63	4.67	4.67	4.68	*0.4%*	
AGR	*1.4%*	*1.6%*	*0.5%*	*0.8%*	*0.1%*	*0.1%*		
Average Installed Base Age (Y)	4.14	4.19	4.22	4.24	4.25	4.25	*0.4%*	
AGR	*1.0%*	*1.0%*	*0.8%*	*0.5%*	*0.3%*	*0.1%*		
Replacement Cycle Length (Y)	4.91	4.94	4.85	4.80	4.77	4.73	*-1.1%*	
AGR	*-0.7%*	*0.7%*	*-1.8%*	*-1.0%*	*-0.8%*	*-0.7%*		
Units per Businesses (#)	22.53	22.63	23.03	23.28	23.51	23.51	*0.9%*	
AGR	*2.2%*	*0.5%*	*1.8%*	*1.1%*	*1.0%*	*0.0%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*0.0%*	
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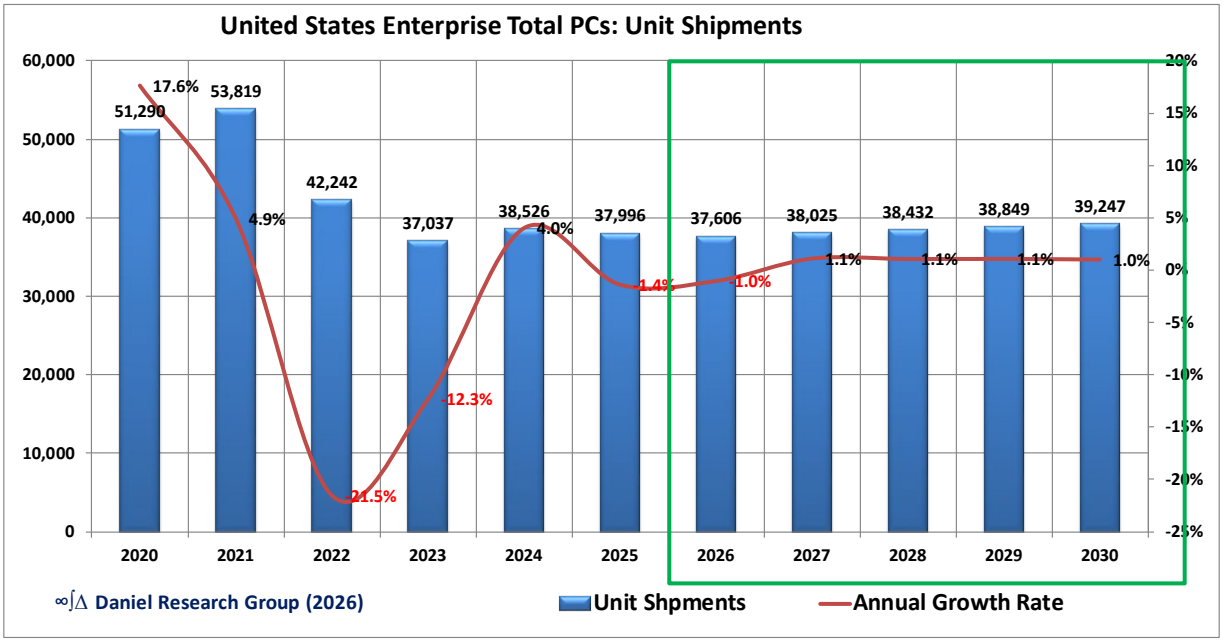

Total PCs

United States Consumer & Enterprise Total PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	69,190	68,728	69,580	70,416	71,276	72,109	*1.2%*	
AGR	*4.5%*	*-0.7%*	*1.2%*	*1.2%*	*1.2%*	*1.2%*		
Revenue ($M)	69,514	82,952	86,507	90,181	93,117	96,100	*3.7%*	
AGR	*13.1%*	*19.3%*	*4.3%*	*4.2%*	*3.3%*	*3.2%*		
Average Price ($)	1,005	1,207	1,243	1,281	1,306	1,333	*2.5%*	
AGR	*8.2%*	*20.1%*	*3.0%*	*3.0%*	*2.0%*	*2.0%*		
Installed Base (K)	258,959	259,050	260,068	261,063	262,140	263,537	*0.4%*	
AGR	*1.1%*	*0.0%*	*0.4%*	*0.4%*	*0.4%*	*0.5%*		
Removal Age (Y)	4.61	4.64	4.68	4.71	4.71	4.68	*0.2%*	
AGR	*0.3%*	*0.7%*	*0.9%*	*0.5%*	*0.0%*	*-0.5%*		
Average Installed Base Age (Y)	4.22	4.25	4.27	4.27	4.26	4.25	*-0.1%*	
AGR	*0.7%*	*0.8%*	*0.3%*	*0.0%*	*-0.2%*	*-0.2%*		
Replacement Cycle Length (Y)	4.89	4.77	4.79	4.76	4.73	4.73	*-0.2%*	
AGR	*-1.7%*	*-2.5%*	*0.4%*	*-0.7%*	*-0.6%*	*-0.2%*		
Units per Households & Businesses (#)	2.30	2.24	2.20	2.16	2.13	2.11	*-1.5%*	
AGR	*-2.5%*	*-2.4%*	*-1.8%*	*-1.9%*	*-1.5%*	*-0.8%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*80.0%*	*81.5%*	*82.9%*	*84.2%*	*85.4%*	*86.1%*	*6.2%*	
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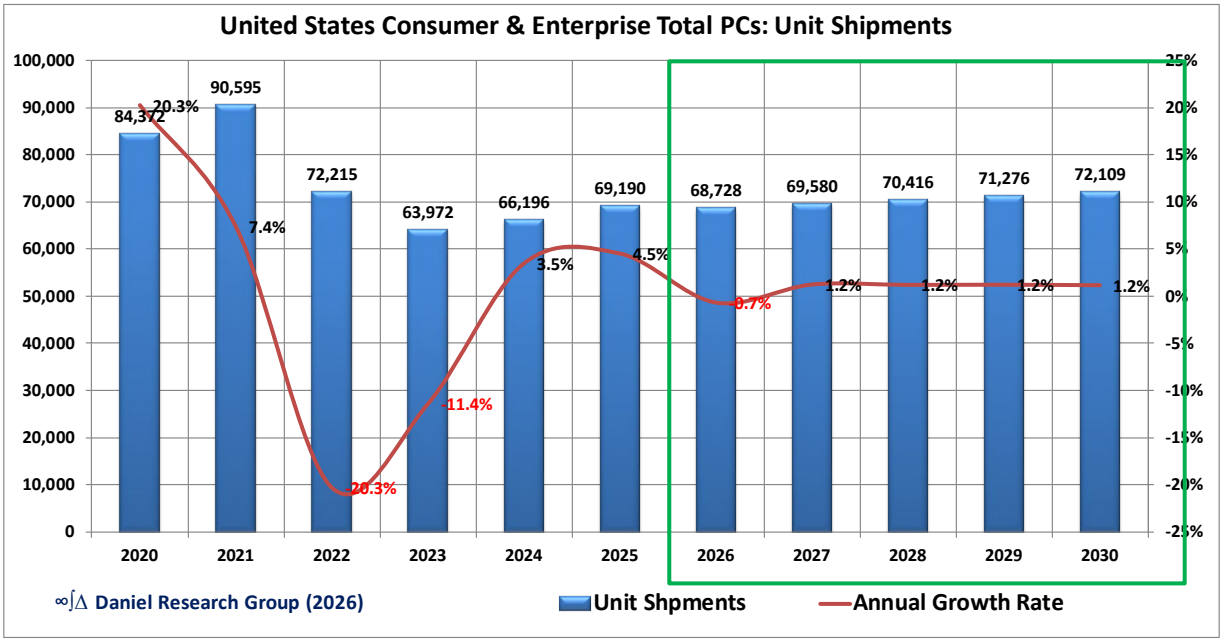
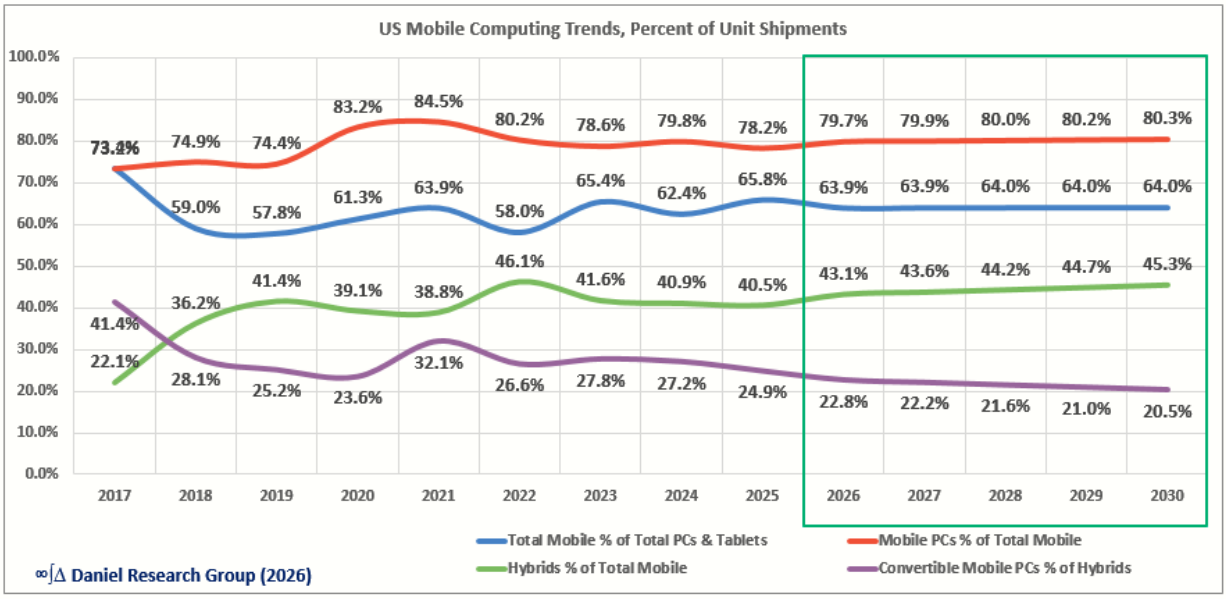


Mobile PCs and Tablets
Mobile Trends



Consumer

United States Consumer Mobile PCs & Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	56,329	59,211	60,245	61,291	62,385	63,483	1.8%	
AGR	*-0.6%*	*5.1%*	*1.7%*	*1.7%*	*1.8%*	*1.8%*		
Revenue ($M)	43,868	53,320	56,242	59,302	61,931	64,644	4.9%	
AGR	*9.4%*	*21.5%*	*5.5%*	*5.4%*	*4.4%*	*4.4%*		
Average Price ($)	779	901	934	968	993	1,018	3.1%	
AGR	*10.1%*	*15.6%*	*3.7%*	*3.6%*	*2.6%*	*2.6%*		
Installed Base (K)	260,777	254,124	250,220	247,674	246,186	246,267	-0.8%	
AGR	*-2.5%*	*-2.6%*	*-1.5%*	*-1.0%*	*-0.6%*	*0.0%*		
Removal Age (Y)	5.31	5.30	5.31	5.26	5.22	5.08	-1.1%	
AGR	*3.2%*	*-0.3%*	*0.2%*	*-0.9%*	*-0.6%*	*-2.8%*		
Average Installed Base Age (Y)	4.61	4.62	4.58	4.53	4.47	4.41	-1.1%	
AGR	*1.6%*	*0.1%*	*-0.7%*	*-1.1%*	*-1.5%*	*-1.1%*		
Replacement Cycle Length (Y)	5.14	4.86	4.90	4.88	4.85	4.88	0.1%	
AGR	*-2.7%*	*-5.6%*	*0.9%*	*-0.4%*	*-0.5%*	*0.6%*		
Units per Households (#)	1.94	1.88	1.84	1.80	1.78	1.78	-1.4%	
AGR	*-4.2%*	*-3.2%*	*-2.1%*	*-1.8%*	*-1.2%*	*-0.5%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*99.9%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*0.1%*	
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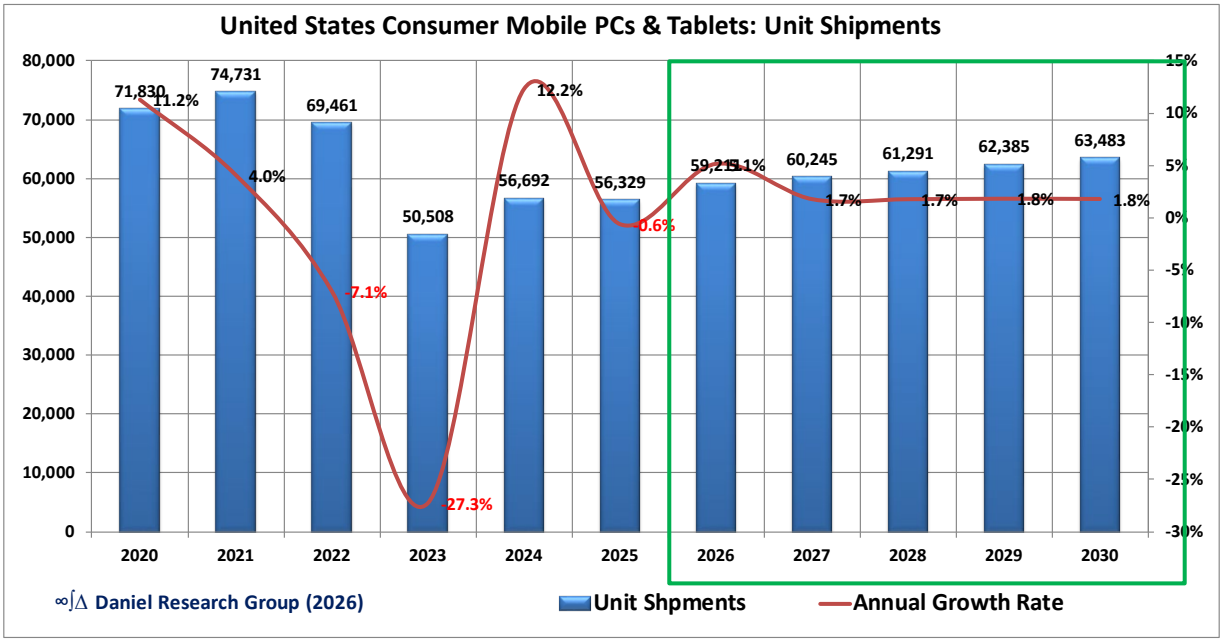

Enterprise

United States Enterprise Mobile PCs & Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	33,659	34,428	34,592	34,747	34,914	35,066	*0.5%*	
AGR	*-6.5%*	*2.3%*	*0.5%*	*0.4%*	*0.5%*	*0.4%*		
Revenue ($M)	27,158	34,648	35,911	37,205	38,179	39,157	*3.1%*	
AGR	*4.4%*	*27.6%*	*3.6%*	*3.6%*	*2.6%*	*2.6%*		
Average Price ($)	807	1,006	1,038	1,071	1,094	1,117	*2.6%*	
AGR	*11.6%*	*24.7%*	*3.2%*	*3.1%*	*2.1%*	*2.1%*		
Installed Base (K)	136,363	138,193	138,924	139,212	139,245	139,133	*0.2%*	
AGR	*1.4%*	*1.3%*	*0.5%*	*0.2%*	*0.0%*	*-0.1%*		
Removal Age (Y)	4.60	4.70	4.78	4.85	4.89	4.91	*1.1%*	
AGR	*4.1%*	*2.2%*	*1.7%*	*1.5%*	*0.8%*	*0.5%*		
Average Installed Base Age (Y)	4.16	4.23	4.29	4.32	4.35	4.36	*0.8%*	
AGR	*2.6%*	*1.7%*	*1.3%*	*0.9%*	*0.6%*	*0.3%*		
Replacement Cycle Length (Y)	5.28	5.24	5.10	5.04	4.99	4.96	*-1.4%*	
AGR	*-0.3%*	*-0.8%*	*-2.6%*	*-1.2%*	*-0.9%*	*-0.7%*		
Units per Businesses (#)	21.75	21.93	22.31	22.50	22.65	22.57	*0.7%*	
AGR	*2.2%*	*0.8%*	*1.7%*	*0.9%*	*0.7%*	*-0.4%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*0.0%*	
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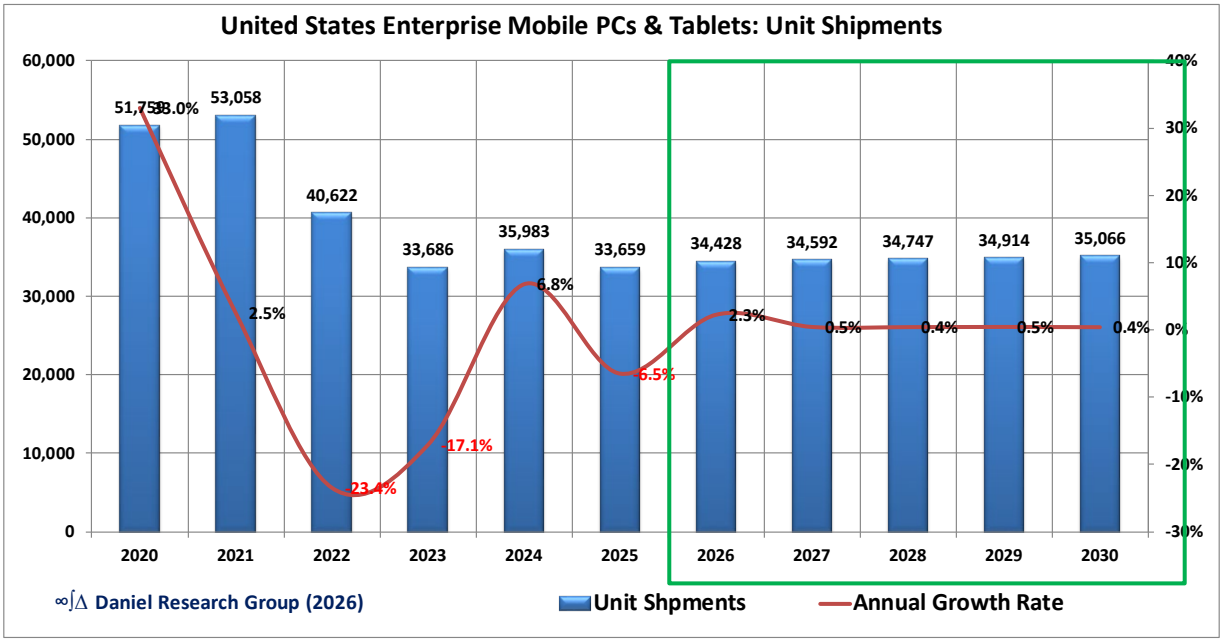

Total Mobile PCs and Tablets

United States Consumer & Enterprise Mobile PCs & Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	89,988	93,638	94,836	96,038	97,298	98,549	1.3%	
AGR	*-2.9%*	*4.1%*	*1.3%*	*1.3%*	*1.3%*	*1.3%*		
Revenue ($M)	71,026	87,969	92,153	96,507	100,110	103,801	4.2%	
AGR	*7.5%*	*23.9%*	*4.8%*	*4.7%*	*3.7%*	*3.7%*		
Average Price ($)	789	939	972	1,005	1,029	1,053	2.9%	
AGR	*10.7%*	*19.0%*	*3.4%*	*3.4%*	*2.4%*	*2.4%*		
Installed Base (K)	397,140	392,317	389,144	386,886	385,431	385,400	-0.4%	
AGR	*-1.2%*	*-1.2%*	*-0.8%*	*-0.6%*	*-0.4%*	*0.0%*		
Removal Age (Y)	5.04	5.07	5.11	5.11	5.10	5.02	-0.3%	
AGR	*3.5%*	*0.6%*	*0.7%*	*0.0%*	*-0.2%*	*-1.6%*		
Average Installed Base Age (Y)	4.44	4.48	4.48	4.46	4.43	4.40	-0.4%	
AGR	*2.0%*	*0.7%*	*0.0%*	*-0.4%*	*-0.7%*	*-0.6%*		
Replacement Cycle Length (Y)	5.19	4.98	4.97	4.94	4.90	4.91	-0.4%	
AGR	*-1.9%*	*-4.0%*	*-0.3%*	*-0.7%*	*-0.7%*	*0.1%*		
Units per Households & Businesses (#)	2.82	2.77	2.73	2.70	2.67	2.66	-1.0%	
AGR	*-2.9%*	*-1.9%*	*-1.3%*	*-1.3%*	*-0.9%*	*-0.5%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*99.9%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*0.1%*	
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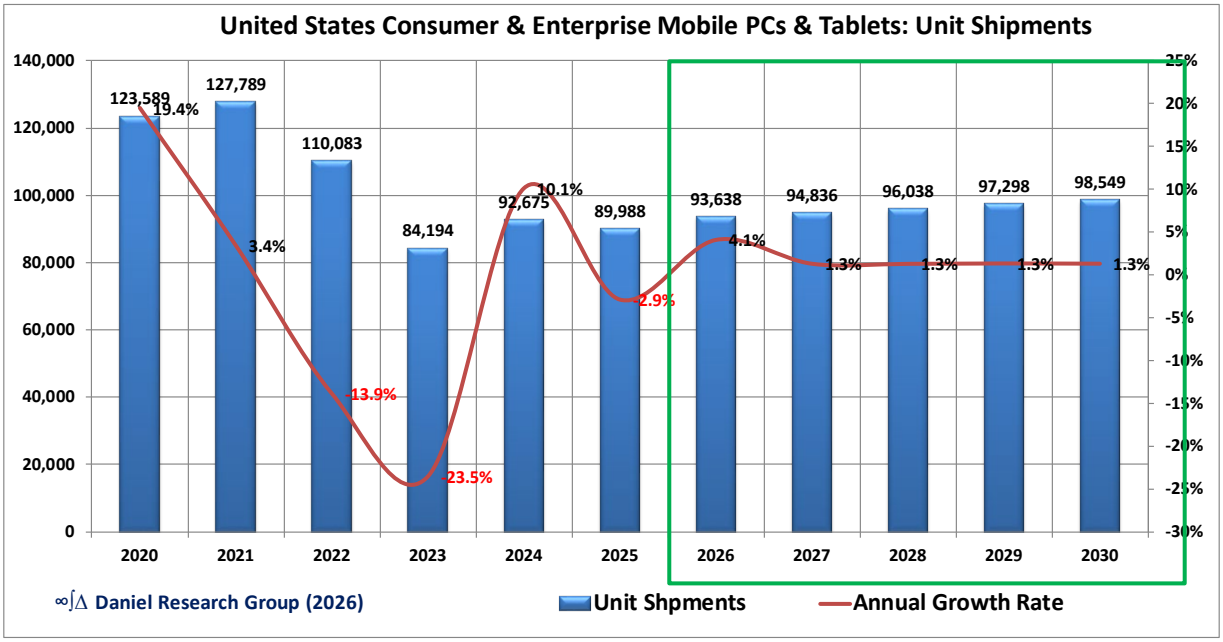

Hybrids, 2-in-1, Convertible Model PCs, and Detachable Tablets
Consumer

United States Consumer 2-in-1 Hybrid PC & Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	20,043	21,297	22,110	22,941	23,805	24,684	3.8%	
AGR	*9.2%*	*6.3%*	*3.8%*	*3.8%*	*3.8%*	*3.7%*		
Revenue ($M)	13,439	16,985	18,153	19,390	20,511	21,682	6.3%	
AGR	*4.9%*	*26.4%*	*6.9%*	*6.8%*	*5.8%*	*5.7%*		
Average Price ($)	671	798	821	845	862	878	2.4%	
AGR	*-3.9%*	*18.9%*	*2.9%*	*2.9%*	*1.9%*	*1.9%*		
Installed Base (K)	77,289	78,632	79,919	81,523	83,413	85,710	2.2%	
AGR	*2.5%*	*1.7%*	*1.6%*	*2.0%*	*2.3%*	*2.8%*		
Removal Age (Y)	4.07	4.23	4.33	4.43	4.52	4.51	1.6%	
AGR	*5.3%*	*3.9%*	*2.5%*	*2.3%*	*1.9%*	*-0.2%*		
Average Installed Base Age (Y)	4.00	4.11	4.18	4.20	4.18	4.15	0.2%	
AGR	*4.9%*	*2.8%*	*1.6%*	*0.5%*	*-0.4%*	*-0.7%*		
Replacement Cycle Length (Y)	5.26	4.94	4.84	4.82	4.81	4.83	-0.6%	
AGR	*-5.7%*	*-6.0%*	*-2.1%*	*-0.4%*	*-0.3%*	*0.5%*		
Units per Households (#)	2.92	3.03	3.15	3.28	3.42	3.59	4.3%	
AGR	*3.2%*	*4.0%*	*3.8%*	*4.0%*	*4.5%*	*4.8%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*19.7%*	*19.1%*	*18.6%*	*18.1%*	*17.7%*	*17.2%*	*-2.5%*	
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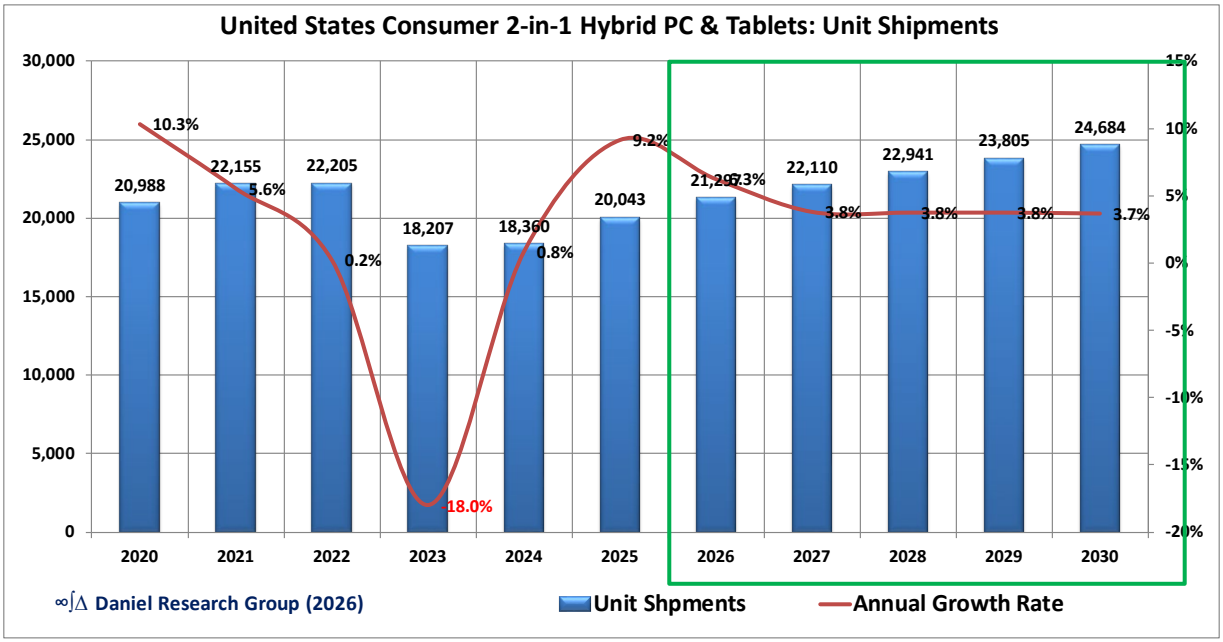

Enterprise

United States Enterprise 2-in-1 Hybrid PC & Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	7,972	8,311	8,233	8,152	8,072	7,988	-1.0%	
AGR	-8.8%	4.3%	-0.9%	-1.0%	-1.0%	-1.0%		
Revenue ($M)	6,282	8,223	8,391	8,558	8,644	8,726	1.5%	
AGR	-1.9%	30.9%	2.0%	2.0%	1.0%	0.9%		
Average Price ($)	788	989	1,019	1,050	1,071	1,092	2.5%	
AGR	7.6%	25.6%	3.0%	3.0%	2.0%	2.0%		
Installed Base (K)	27,193	27,694	27,699	27,527	27,242	26,885	-0.7%	
AGR	1.4%	1.8%	0.0%	-0.6%	-1.0%	-1.3%		
Removal Age (Y)	3.46	3.69	3.89	4.06	4.19	4.28	3.7%	
AGR	11.7%	6.6%	5.3%	4.4%	3.1%	2.2%		
Average Installed Base Age (Y)	3.70	3.87	4.02	4.12	4.18	4.22	2.2%	
AGR	7.7%	4.7%	3.6%	2.5%	1.6%	0.9%		
Replacement Cycle Length (Y)	4.58	4.55	4.37	4.31	4.26	4.22	-1.8%	
AGR	-0.7%	-0.8%	-4.0%	-1.4%	-1.1%	-0.9%		
Units per Businesses (#)	4.37	4.41	4.45	4.45	4.43	4.36	-0.3%	
AGR	1.1%	0.8%	1.0%	0.0%	-0.4%	-1.6%		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*99.3%*	*99.7%*	*99.9%*	*100.0%*	*100.0%*	*100.0%*	*0.7%*	
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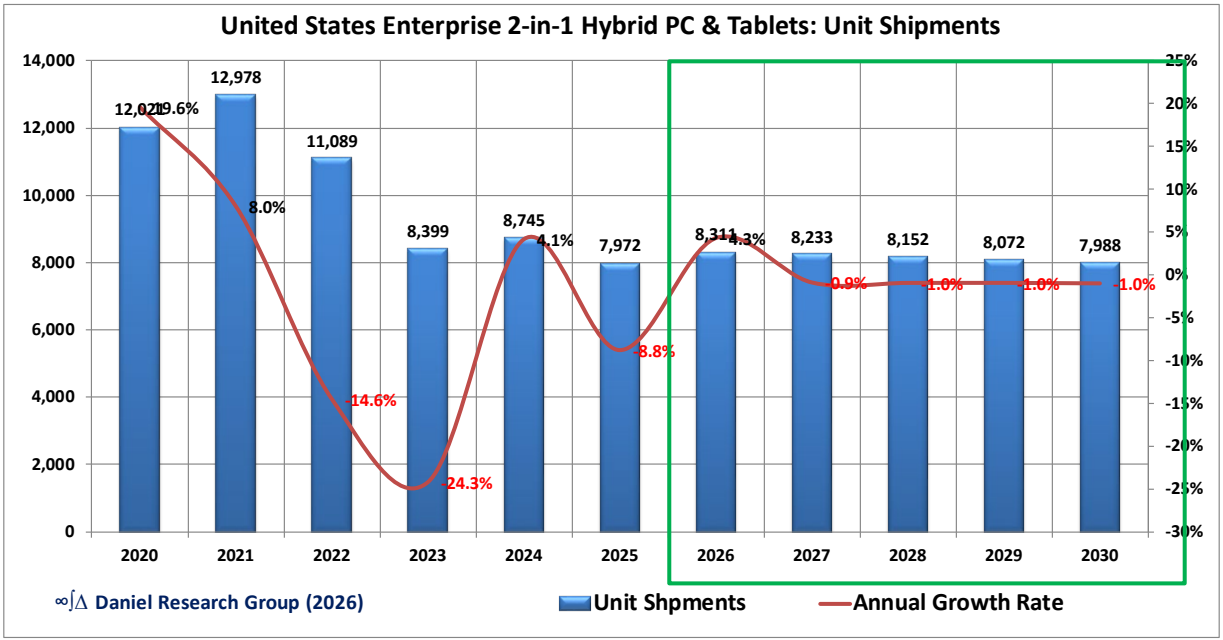

Total Hybrids

United States Consumer & Enterprise 2-in-1 Hybrid PC & Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	28,015	29,608	30,343	31,094	31,877	32,673	*2.5%*	
AGR	*3.4%*	*5.7%*	*2.5%*	*2.5%*	*2.5%*	*2.5%*		
Revenue ($M)	19,721	25,209	26,544	27,948	29,155	30,408	*4.8%*	
AGR	*2.6%*	*27.8%*	*5.3%*	*5.3%*	*4.3%*	*4.3%*		
Average Price ($)	704	851	875	899	915	931	*2.3%*	
AGR	*-0.7%*	*21.0%*	*2.7%*	*2.7%*	*1.8%*	*1.8%*		
Installed Base (K)	104,482	106,326	107,618	109,050	110,655	112,595	*1.4%*	
AGR	*2.2%*	*1.8%*	*1.2%*	*1.3%*	*1.5%*	*1.8%*		
Removal Age (Y)	3.87	4.05	4.19	4.31	4.41	4.44	*2.3%*	
AGR	*7.2%*	*4.7%*	*3.4%*	*3.0%*	*2.2%*	*0.6%*		
Average Installed Base Age (Y)	3.90	4.04	4.13	4.17	4.18	4.17	*0.8%*	
AGR	*5.8%*	*3.5%*	*2.2%*	*1.1%*	*0.1%*	*-0.2%*		
Replacement Cycle Length (Y)	5.06	4.83	4.70	4.68	4.66	4.66	*-0.9%*	
AGR	*-4.2%*	*-4.5%*	*-2.6%*	*-0.6%*	*-0.5%*	*0.2%*		
Units per Households & Businesses (#)	3.19	3.30	3.41	3.51	3.62	3.75	*3.2%*	
AGR	*2.7%*	*3.4%*	*3.1%*	*3.1%*	*3.3%*	*3.3%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*23.2%*	*22.7%*	*22.2%*	*21.7%*	*21.2%*	*20.7%*	*-2.5%*	
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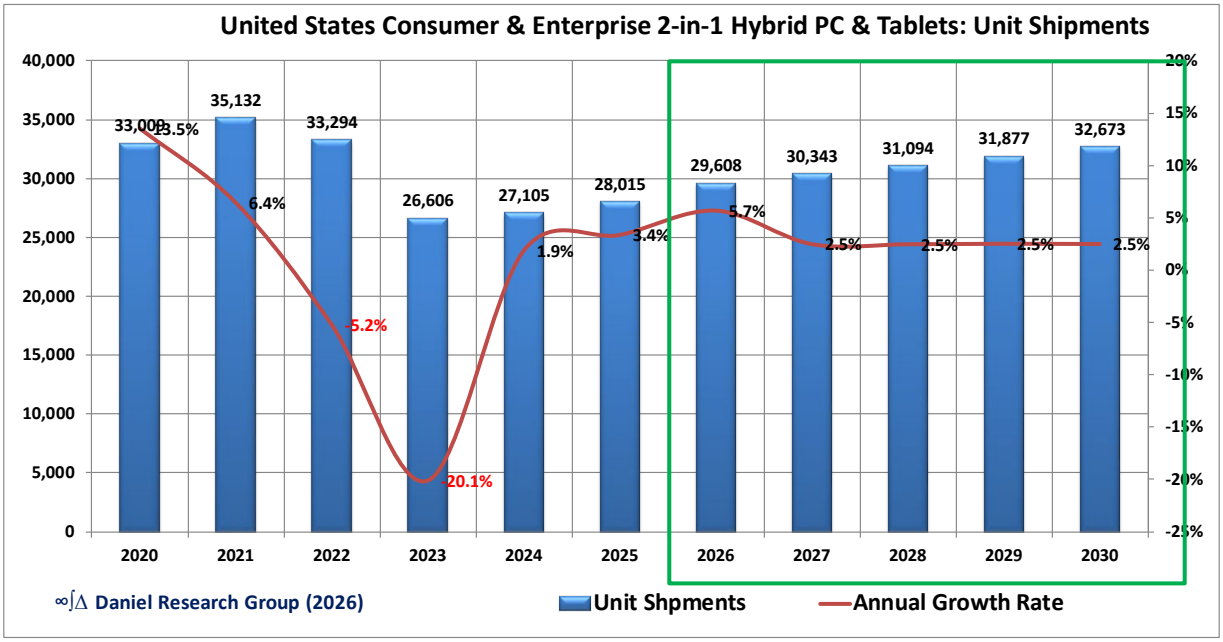

Total PCs and Tablets
Consumer

United States Consumer PCs & Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	62,564	65,374	66,294	67,224	68,205	69,188	*1.4%*	
AGR	*0.2%*	*4.5%*	*1.4%*	*1.4%*	*1.5%*	*1.4%*		
Revenue ($M)	51,771	62,492	65,513	68,668	71,303	74,013	*4.3%*	
AGR	*10.1%*	*20.7%*	*4.8%*	*4.8%*	*3.8%*	*3.8%*		
Average Price ($)	827	956	988	1,021	1,045	1,070	*2.9%*	
AGR	*9.9%*	*15.5%*	*3.4%*	*3.4%*	*2.3%*	*2.3%*		
Installed Base (K)	277,315	270,633	266,646	263,958	262,282	262,128	*-0.8%*	
AGR	*-2.3%*	*-2.4%*	*-1.5%*	*-1.0%*	*-0.6%*	*-0.1%*		
Removal Age (Y)	5.19	5.17	5.17	5.12	5.09	4.96	*-1.0%*	
AGR	*2.4%*	*-0.4%*	*0.1%*	*-0.9%*	*-0.7%*	*-2.5%*		
Average Installed Base Age (Y)	4.55	4.56	4.53	4.48	4.42	4.38	*-1.0%*	
AGR	*1.4%*	*0.1%*	*-0.7%*	*-1.0%*	*-1.3%*	*-1.0%*		
Replacement Cycle Length (Y)	5.01	4.76	4.79	4.78	4.75	4.78	*0.1%*	
AGR	*-2.6%*	*-5.1%*	*0.8%*	*-0.4%*	*-0.5%*	*0.6%*		
Units per Households (#)	2.06	2.00	1.96	1.92	1.90	1.89	*-1.4%*	
AGR	*-4.0%*	*-3.0%*	*-2.1%*	*-1.7%*	*-1.2%*	*-0.6%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*		
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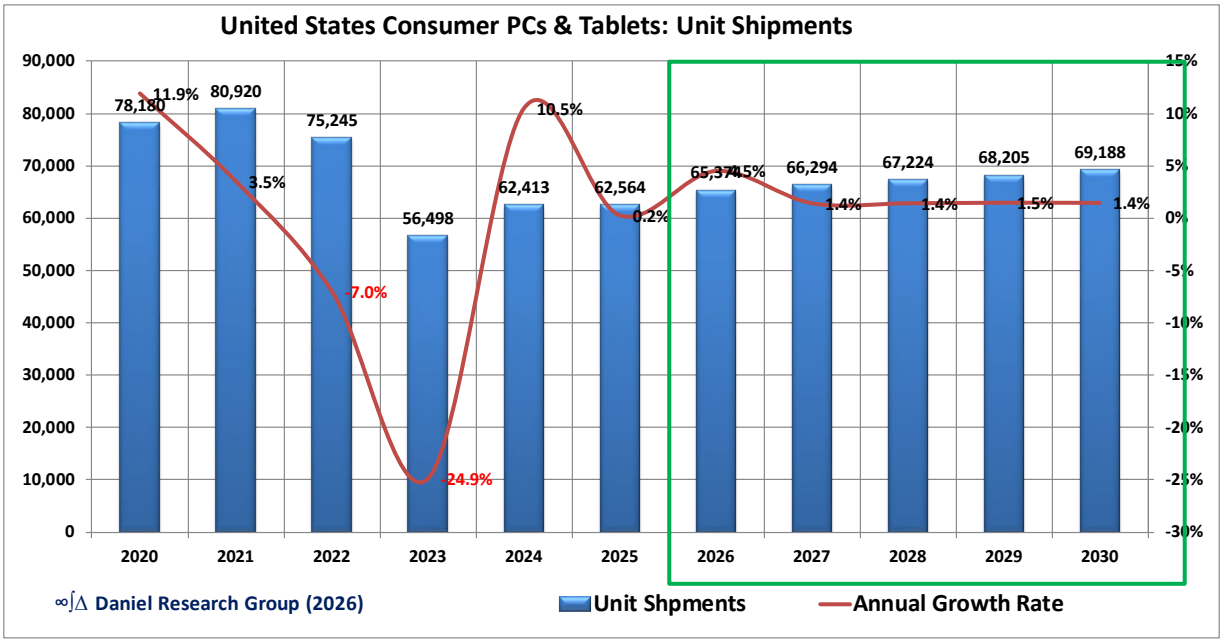

Enterprise

United States Enterprise PCs & Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	42,528	42,189	42,534	42,872	43,224	43,560	*0.8%*	
AGR	*-2.5%*	*-0.8%*	*0.8%*	*0.8%*	*0.8%*	*0.8%*		
Revenue ($M)	34,937	42,573	44,264	46,005	47,360	48,729	*3.4%*	
AGR	*9.0%*	*21.9%*	*4.0%*	*3.9%*	*2.9%*	*2.9%*		
Average Price ($)	822	1,009	1,041	1,073	1,096	1,119	*2.6%*	
AGR	*11.9%*	*22.8%*	*3.1%*	*3.1%*	*2.1%*	*2.1%*		
Installed Base (K)	160,985	161,713	161,713	161,560	161,396	161,262	*-0.1%*	
AGR	*0.7%*	*0.5%*	*0.0%*	*-0.1%*	*-0.1%*	*-0.1%*		
Removal Age (Y)	4.58	4.65	4.68	4.71	4.71	4.70	*0.3%*	
AGR	*1.9%*	*1.7%*	*0.6%*	*0.6%*	*-0.1%*	*-0.1%*		
Average Installed Base Age (Y)	4.19	4.23	4.26	4.28	4.29	4.29	*0.3%*	
AGR	*1.2%*	*1.1%*	*0.7%*	*0.4%*	*0.2%*	*0.0%*		
Replacement Cycle Length (Y)	4.89	4.90	4.80	4.76	4.72	4.69	*-1.1%*	
AGR	*-0.7%*	*0.3%*	*-2.0%*	*-1.0%*	*-0.7%*	*-0.6%*		
Units per Businesses (#)	25.68	25.66	25.97	26.12	26.26	26.16	*0.5%*	
AGR	*1.6%*	*-0.1%*	*1.2%*	*0.6%*	*0.5%*	*-0.4%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*0.0%*	
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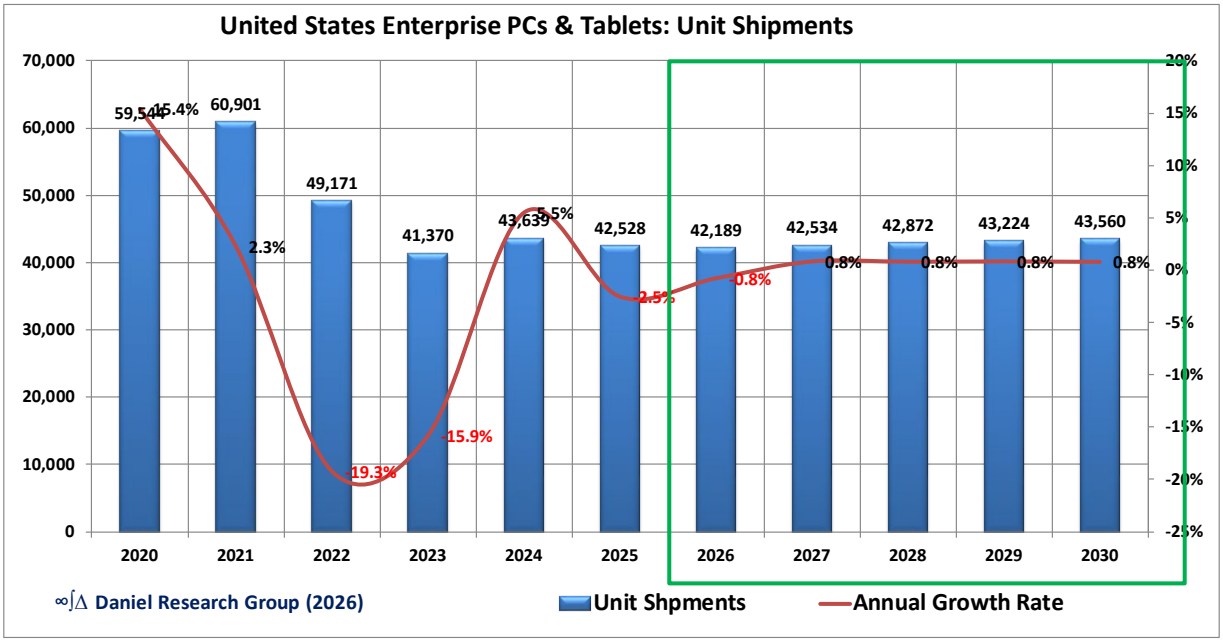

Total PCs and Tablets

United States Consumer & Enterprise PCs & Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	105,092	107,563	108,828	110,096	111,428	112,748	1.2%	
AGR	*-0.9%*	*2.4%*	*1.2%*	*1.2%*	*1.2%*	*1.2%*		
Revenue ($M)	86,708	105,065	109,777	114,673	118,662	122,742	4.0%	
AGR	*9.7%*	*21.2%*	*4.5%*	*4.5%*	*3.5%*	*3.4%*		
Average Price ($)	825	977	1,009	1,042	1,065	1,089	2.7%	
AGR	*10.7%*	*18.4%*	*3.3%*	*3.3%*	*2.2%*	*2.2%*		
Installed Base (K)	438,300	432,346	428,360	425,518	423,678	423,390	-0.5%	
AGR	*-1.2%*	*-1.4%*	*-0.9%*	*-0.7%*	*-0.4%*	*-0.1%*		
Removal Age (Y)	4.94	4.96	4.97	4.96	4.94	4.86	-0.5%	
AGR	*2.2%*	*0.4%*	*0.4%*	*-0.2%*	*-0.5%*	*-1.5%*		
Average Installed Base Age (Y)	4.41	4.43	4.43	4.40	4.37	4.34	-0.5%	
AGR	*1.4%*	*0.5%*	*-0.1%*	*-0.5%*	*-0.8%*	*-0.7%*		
Replacement Cycle Length (Y)	4.96	4.81	4.80	4.77	4.74	4.75	-0.3%	
AGR	*-1.9%*	*-3.1%*	*-0.2%*	*-0.6%*	*-0.6%*	*0.1%*		
Units per Households & Businesses (#)	3.11	3.05	3.01	2.97	2.94	2.92	-1.1%	
AGR	*-2.9%*	*-2.0%*	*-1.4%*	*-1.3%*	*-0.9%*	*-0.6%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*0.0%*	
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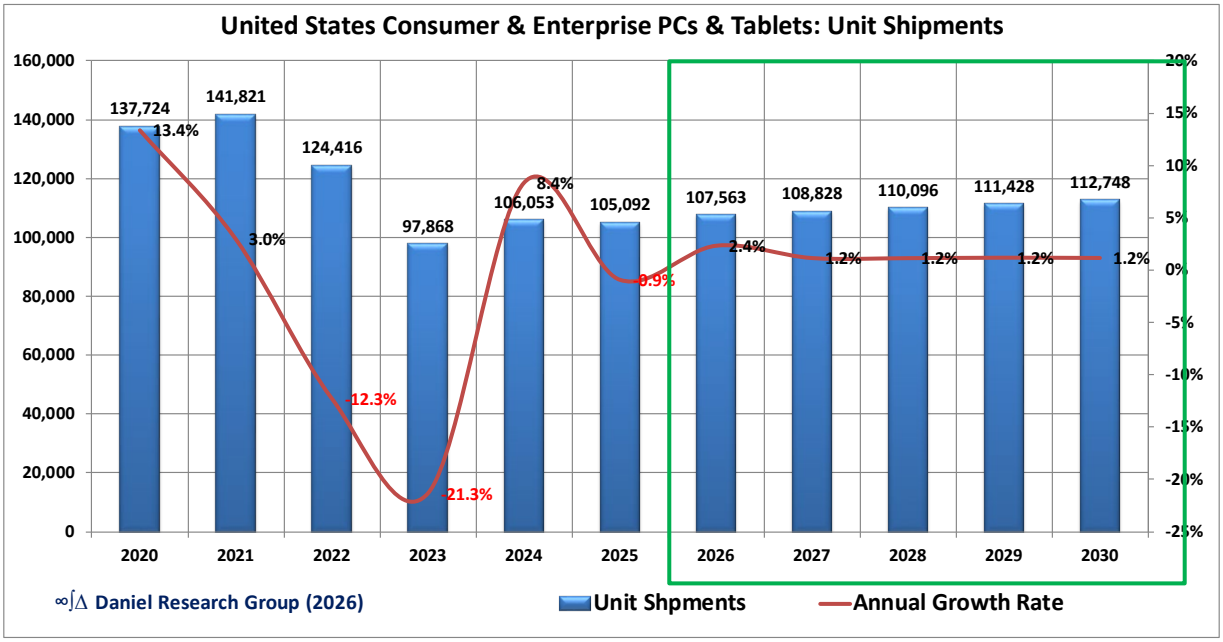

Total Personal Devices – PCs, Tablets, and Phones
Consumer

United States Consumer Personal Devices								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	188,284	183,368	187,156	190,957	194,877	198,780	2.0%	
AGR	*2.7%*	*-2.6%*	*2.1%*	*2.0%*	*2.1%*	*2.0%*		
Revenue ($M)	151,745	167,018	171,329	175,730	179,626	183,538	2.4%	
AGR	*8.4%*	*10.1%*	*2.6%*	*2.6%*	*2.2%*	*2.2%*		
Average Price ($)	806	911	915	920	922	923	0.3%	
AGR	*5.5%*	*13.0%*	*0.5%*	*0.5%*	*0.2%*	*0.2%*		
Installed Base (K)	857,794	837,622	823,914	811,646	801,302	793,418	-1.3%	
AGR	*-2.6%*	*-2.4%*	*-1.6%*	*-1.5%*	*-1.3%*	*-1.0%*		
Removal Age (Y)	5.66	5.80	5.71	5.67	5.62	5.38	-1.9%	
AGR	*2.6%*	*2.6%*	*-1.6%*	*-0.7%*	*-0.8%*	*-4.3%*		
Average Installed Base Age (Y)	5.87	5.84	5.79	5.71	5.60	5.52	-1.4%	
AGR	*0.2%*	*-0.4%*	*-0.9%*	*-1.4%*	*-1.9%*	*-1.5%*		
Replacement Cycle Length (Y)	5.07	5.12	5.10	4.99	4.90	4.84	-1.4%	
AGR	*-3.1%*	*0.9%*	*-0.3%*	*-2.1%*	*-1.8%*	*-1.3%*		
Units per Households (#)	6.42	6.22	6.07	5.93	5.82	5.73	-2.0%	
AGR	*-4.4%*	*-3.1%*	*-2.3%*	*-2.3%*	*-1.9%*	*-1.5%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*99.3%*	*99.5%*	*99.6%*	*99.6%*	*99.7%*	*99.8%*	*0.4%*	
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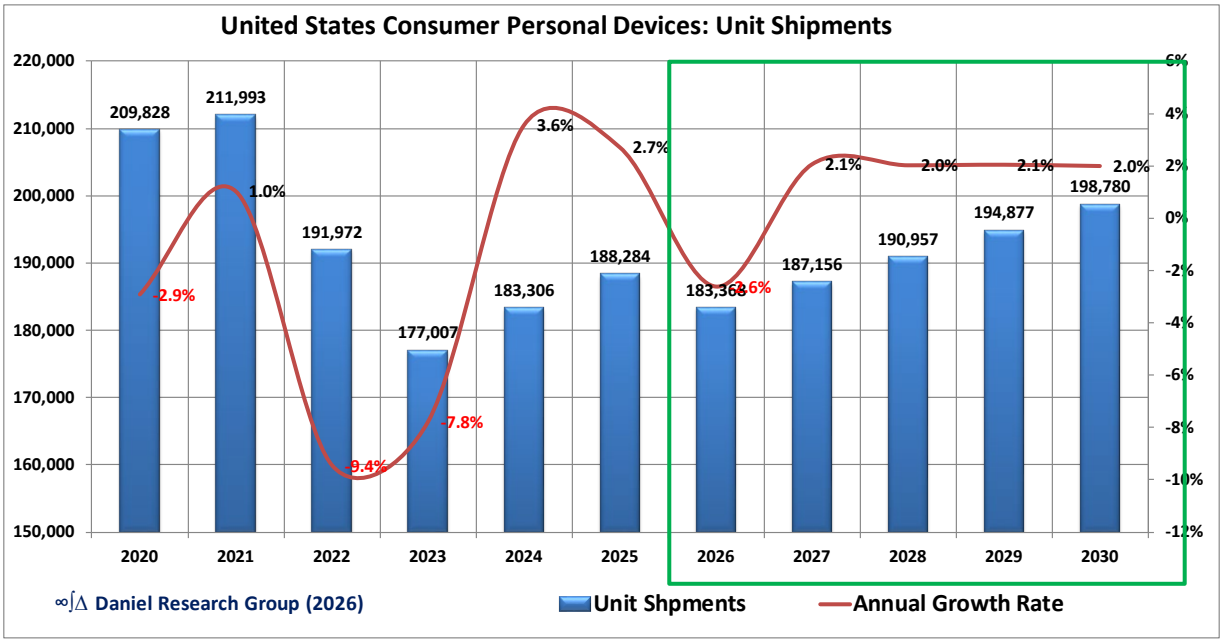

Enterprise

United States Enterprise Personal Devices								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	55,047	54,663	55,051	55,423	55,811	56,175	*0.7%*	
AGR	*-0.6%*	*-0.7%*	*0.7%*	*0.7%*	*0.7%*	*0.7%*		
Revenue ($M)	45,858	54,573	56,433	58,340	59,862	61,392	*3.0%*	
AGR	*8.1%*	*19.0%*	*3.4%*	*3.4%*	*2.6%*	*2.6%*		
Average Price ($)	833	998	1,025	1,053	1,073	1,093	*2.3%*	
AGR	*8.8%*	*19.8%*	*2.7%*	*2.7%*	*1.9%*	*1.9%*		
Installed Base (K)	210,325	209,476	208,120	207,788	207,686	207,650	*-0.2%*	
AGR	*-0.4%*	*-0.4%*	*-0.6%*	*-0.2%*	*0.0%*	*0.0%*		
Removal Age (Y)	4.94	4.93	4.89	4.84	4.77	4.73	*-1.0%*	
AGR	*-1.6%*	*-0.3%*	*-0.8%*	*-1.2%*	*-1.3%*	*-0.9%*		
Average Installed Base Age (Y)	4.79	4.77	4.74	4.72	4.71	4.70	*-0.3%*	
AGR	*-0.6%*	*-0.5%*	*-0.5%*	*-0.5%*	*-0.3%*	*-0.2%*		
Replacement Cycle Length (Y)	4.77	4.77	4.69	4.73	4.71	4.69	*-0.4%*	
AGR	*1.0%*	*0.1%*	*-1.8%*	*0.8%*	*-0.3%*	*-0.4%*		
Units per Businesses (#)	33.77	33.41	33.56	33.71	33.88	33.76	*0.3%*	
AGR	*0.4%*	*-1.1%*	*0.4%*	*0.4%*	*0.5%*	*-0.3%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*99.3%*	*99.5%*	*99.6%*	*99.6%*	*99.7%*	*99.8%*	*0.4%*	
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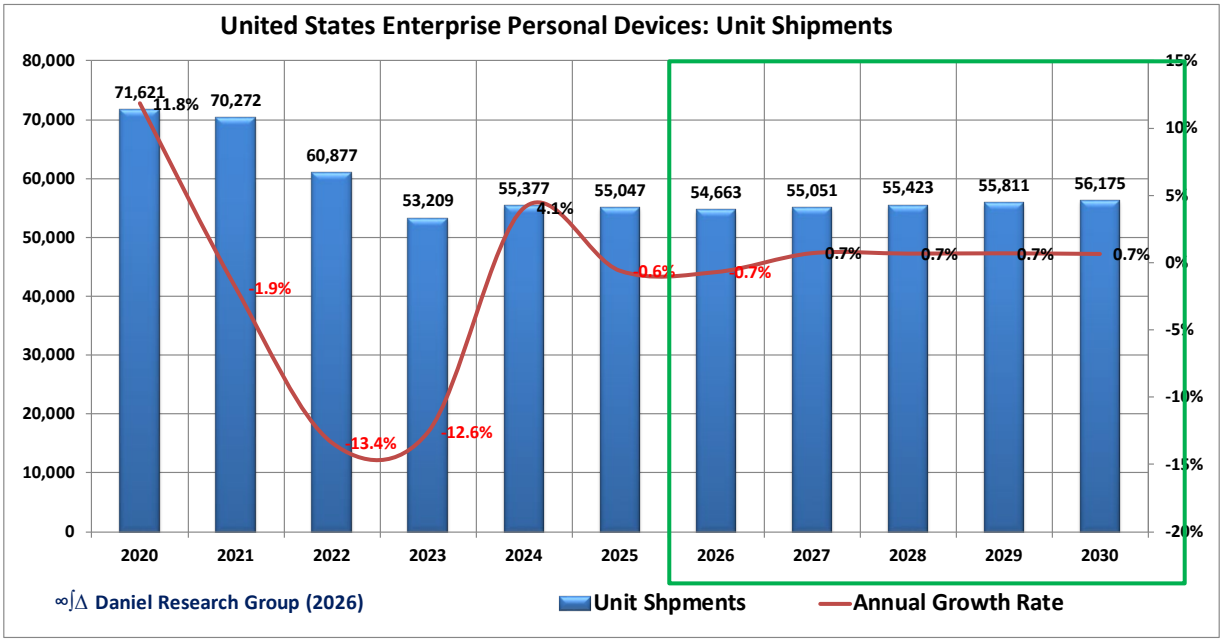

Total Personal Devices

United States Consumer & Enterprise Personal Devices								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	243,331	238,031	242,207	246,380	250,688	254,955	*1.7%*	
AGR	*1.9%*	*-2.2%*	*1.8%*	*1.7%*	*1.7%*	*1.7%*		
Revenue ($M)	197,604	221,590	227,762	234,069	239,487	244,930	*2.5%*	
AGR	*8.3%*	*12.1%*	*2.8%*	*2.8%*	*2.3%*	*2.3%*		
Average Price ($)	812	931	940	950	955	961	*0.8%*	
AGR	*6.3%*	*14.6%*	*1.0%*	*1.0%*	*0.6%*	*0.6%*		
Installed Base (K)	1,068,119	1,047,098	1,032,034	1,019,434	1,008,988	1,001,069	*-1.1%*	
AGR	*-2.1%*	*-2.0%*	*-1.4%*	*-1.2%*	*-1.0%*	*-0.8%*		
Removal Age (Y)	5.50	5.60	5.53	5.48	5.41	5.22	*-1.8%*	
AGR	*1.2%*	*1.8%*	*-1.3%*	*-1.0%*	*-1.2%*	*-3.5%*		
Average Installed Base Age (Y)	5.66	5.63	5.59	5.52	5.44	5.37	*-1.2%*	
AGR	*0.0%*	*-0.4%*	*-0.8%*	*-1.2%*	*-1.5%*	*-1.2%*		
Replacement Cycle Length (Y)	5.00	5.04	5.01	4.94	4.86	4.81	*-1.2%*	
AGR	*-2.3%*	*0.7%*	*-0.6%*	*-1.5%*	*-1.5%*	*-1.1%*		
Units per Households & Businesses (#)	7.63	7.43	7.27	7.13	7.02	6.93	*-1.7%*	
AGR	*-3.9%*	*-2.7%*	*-2.1%*	*-2.0%*	*-1.6%*	*-1.3%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*99.3%*	*99.5%*	*99.6%*	*99.6%*	*99.7%*	*99.8%*	*0.4%*	
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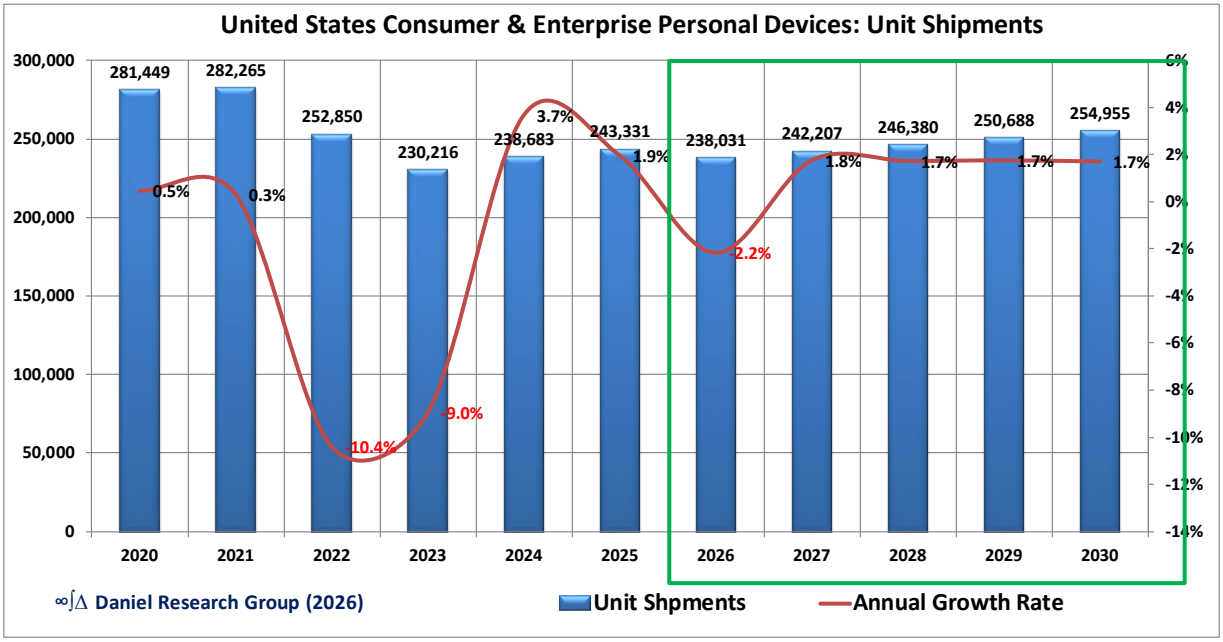

AI Enabled Devices
Desktop PCs

United States Consumer & Enterprise AI Desktop PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	4,131	5,612	7,661	9,603	11,183	12,330	*21.7%*	
AGR	*116.6%*	*35.9%*	*36.5%*	*25.3%*	*16.5%*	*10.3%*		
Revenue ($M)	4,962	7,869	10,938	14,036	16,631	18,686	*24.1%*	
AGR	*139.0%*	*58.6%*	*39.0%*	*28.3%*	*18.5%*	*12.4%*		
Average Price ($)	1,201	1,402	1,428	1,462	1,487	1,515	*2.0%*	
AGR	*10.3%*	*16.7%*	*1.8%*	*2.4%*	*1.7%*	*1.9%*		
Installed Base (K)	3,696	6,294	9,599	13,406	17,389	21,236	*35.5%*	
AGR	*131.3%*	*70.3%*	*52.5%*	*39.7%*	*29.7%*	*22.1%*		
Removal Age (Y)	0.49	0.54	0.57	0.60	0.64	0.69	*6.4%*	
AGR	*3.1%*	*9.1%*	*5.9%*	*6.2%*	*6.7%*	*6.9%*		
Average Installed Base Age (Y)	1.49	1.73	1.95	2.15	2.35	2.55	*10.2%*	
AGR	*12.2%*	*16.7%*	*12.2%*	*10.4%*	*9.4%*	*8.7%*		
Replacement Cycle Length (Y)	2.82	3.09	3.20	3.31	3.42	3.50	*3.2%*	
AGR	*2.3%*	*9.6%*	*3.8%*	*3.4%*	*3.1%*	*2.6%*		
Units per Households & Businesses (#)	1.65	1.66	1.68	1.71	1.73	1.73	*1.2%*	
AGR	*1.5%*	*0.6%*	*1.4%*	*1.6%*	*1.3%*	*0.5%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*10.7%*	*18.4%*	*28.0%*	*39.0%*	*50.4%*	*61.7%*	*51.0%*	
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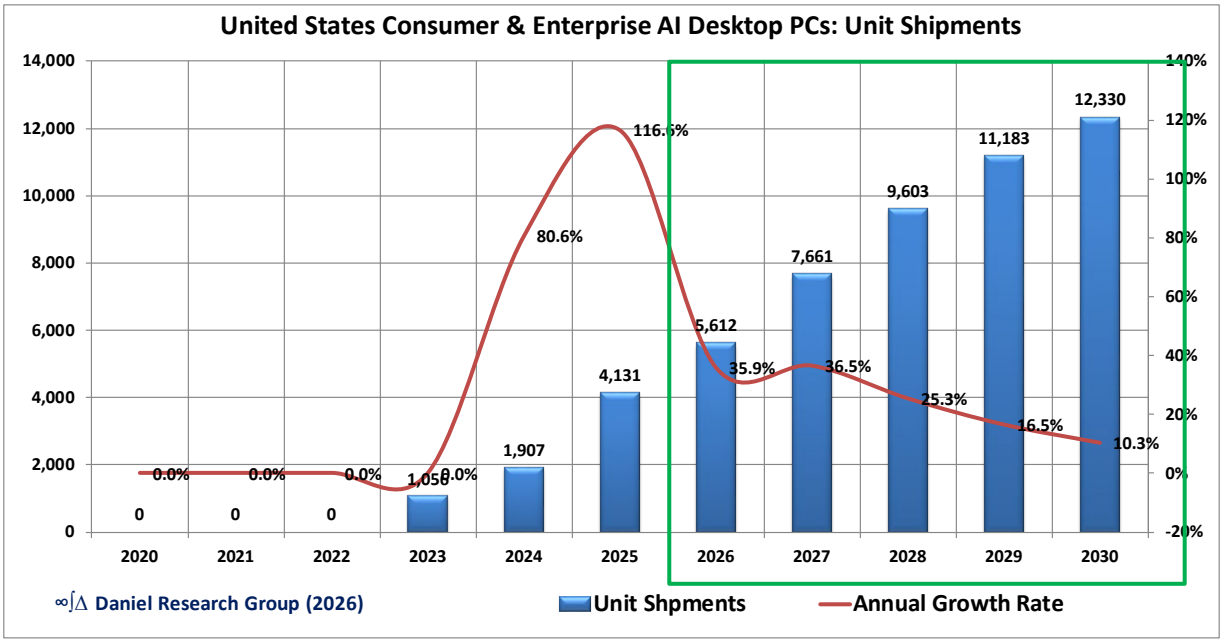

Mobile PCs

United States Consumer & Enterprise AI Mobile PCs								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	16,598	22,790	29,600	36,410	42,608	47,779	*20.3%*	
AGR	*41.8%*	*37.3%*	*29.9%*	*23.0%*	*17.0%*	*12.1%*		
Revenue ($M)	15,637	26,376	37,650	50,580	63,397	75,333	*30.0%*	
AGR	*72.8%*	*68.7%*	*42.7%*	*34.3%*	*25.3%*	*18.8%*		
Average Price ($)	942	1,157	1,272	1,389	1,488	1,577	*8.0%*	
AGR	*21.9%*	*22.8%*	*9.9%*	*9.2%*	*7.1%*	*6.0%*		
Installed Base (K)	24,207	29,029	35,474	43,252	51,847	60,648	*20.2%*	
AGR	*78.4%*	*19.9%*	*22.2%*	*21.9%*	*19.9%*	*17.0%*		
Removal Age (Y)	0.36	0.79	0.78	0.79	0.80	0.82	*0.9%*	
AGR	*13.6%*	*119.7%*	*-0.8%*	*0.5%*	*1.5%*	*2.2%*		
Average Installed Base Age (Y)	1.69	2.12	2.36	2.49	2.58	2.67	*6.0%*	
AGR	*23.0%*	*25.6%*	*11.2%*	*5.7%*	*3.8%*	*3.4%*		
Replacement Cycle Length (Y)	5.06	2.62	2.53	2.51	2.52	2.56	*-0.6%*	
AGR	*8.5%*	*-48.3%*	*-3.2%*	*-0.8%*	*0.5%*	*1.3%*		
Units per Households & Businesses (#)	2.45	2.27	2.15	2.08	2.03	1.99	*-3.2%*	
AGR	*-3.2%*	*-7.4%*	*-5.1%*	*-3.5%*	*-2.4%*	*-1.9%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*10.2%*	*14.0%*	*18.6%*	*23.7%*	*29.3%*	*34.7%*	*24.5%*	
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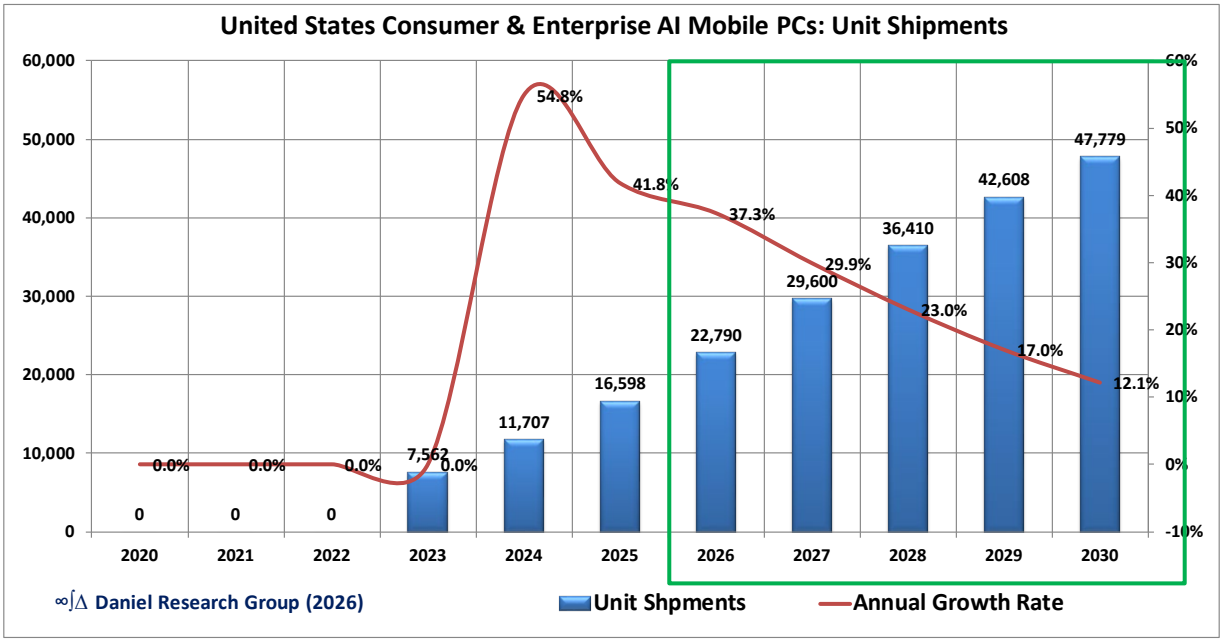

Tablets

United States Consumer & Enterprise AI Tablets								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	2,587	4,115	6,034	8,632	11,973	15,990	*40.4%*	
AGR	*38.5%*	*59.1%*	*46.6%*	*43.1%*	*38.7%*	*33.5%*		
Revenue ($M)	1,582	2,980	4,503	6,628	9,356	12,709	*43.7%*	
AGR	*47.4%*	*88.4%*	*51.1%*	*47.2%*	*41.2%*	*35.8%*		
Average Price ($)	611	724	746	768	781	795	*2.4%*	
AGR	*6.4%*	*18.5%*	*3.0%*	*2.9%*	*1.8%*	*1.7%*		
Installed Base (K)	3,635	6,068	9,517	14,311	20,767	29,099	*48.0%*	
AGR	*79.4%*	*66.9%*	*56.8%*	*50.4%*	*45.1%*	*40.1%*		
Removal Age (Y)	0.38	0.41	0.43	0.44	0.46	0.48	*4.0%*	
AGR	*15.0%*	*8.1%*	*4.8%*	*3.8%*	*3.6%*	*3.9%*		
Average Installed Base Age (Y)	1.66	1.87	2.03	2.16	2.27	2.37	*6.1%*	
AGR	*23.9%*	*12.5%*	*8.6%*	*6.3%*	*5.0%*	*4.5%*		
Replacement Cycle Length (Y)	4.72	4.61	4.68	4.73	4.76	4.80	*1.0%*	
AGR	*9.7%*	*-2.3%*	*1.7%*	*1.0%*	*0.7%*	*0.7%*		
Units per Households & Businesses (#)	4.51	4.28	3.92	3.55	3.27	3.10	*-7.7%*	
AGR	*0.1%*	*-5.1%*	*-8.5%*	*-9.4%*	*-7.9%*	*-5.0%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*3.2%*	*5.7%*	*9.9%*	*16.6%*	*26.3%*	*39.2%*	*35.9%*	
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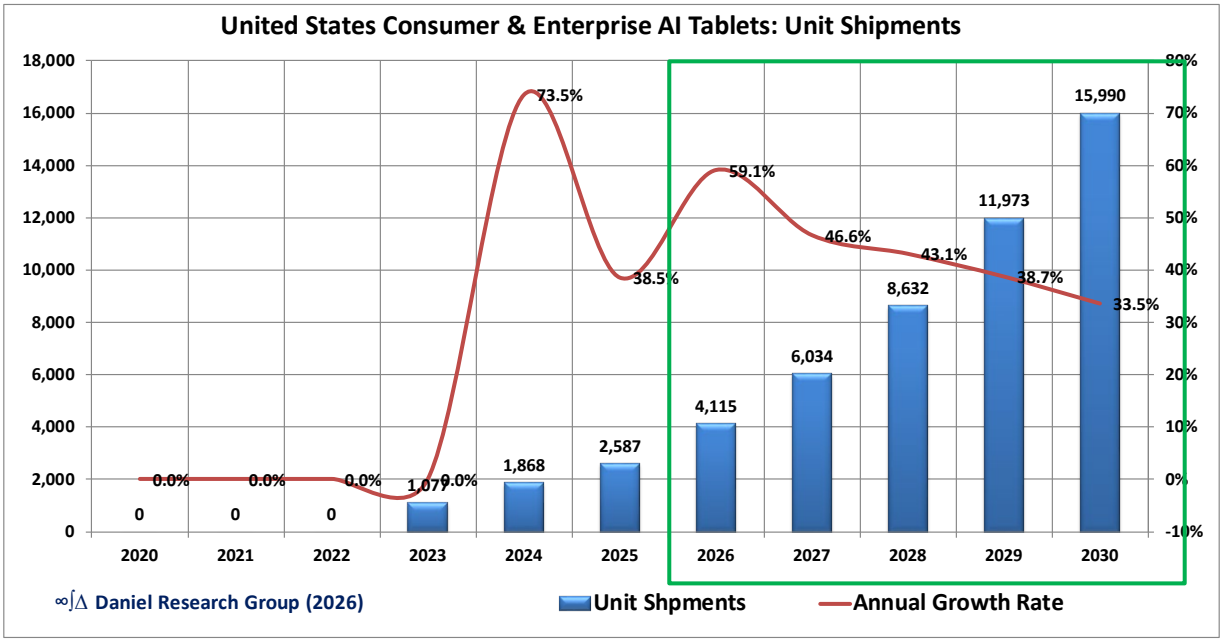

Smartphones

United States Consumer & Enterprise AI SmartPhones								
	2025	2026	2027	2028	2029	2030	CAGR '25-'30	Trend
Unit Shipments (K)	29,574	40,821	57,350	75,541	93,358	109,007	*27.8%*	
AGR	*59.3%*	*38.0%*	*40.5%*	*31.7%*	*23.6%*	*16.8%*		
Revenue ($M)	28,131	43,055	59,896	78,105	95,552	110,438	*26.6%*	
AGR	*63.3%*	*53.1%*	*39.1%*	*30.4%*	*22.3%*	*15.6%*		
Average Price ($)	951	1,055	1,044	1,034	1,023	1,013	*-1.0%*	
AGR	*2.5%*	*10.9%*	*-1.0%*	*-1.0%*	*-1.0%*	*-1.0%*		
Installed Base (K)	29,417	49,025	75,616	109,249	148,789	192,241	*40.7%*	
AGR	*92.4%*	*66.7%*	*54.2%*	*44.5%*	*36.2%*	*29.2%*		
Removal Age (Y)	0.52	0.52	0.54	0.55	0.58	0.60	*3.7%*	
AGR	*3.2%*	*-0.5%*	*3.2%*	*3.4%*	*3.9%*	*4.3%*		
Average Installed Base Age (Y)	1.65	1.91	2.14	2.35	2.57	2.81	*10.0%*	
AGR	*20.8%*	*15.6%*	*11.7%*	*10.0%*	*9.4%*	*9.1%*		
Replacement Cycle Length (Y)	2.90	3.31	3.46	3.61	3.76	3.93	*4.4%*	
AGR	*10.6%*	*14.0%*	*4.4%*	*4.3%*	*4.4%*	*4.5%*		
Units per Households & Businesses (#)	2.15	2.24	2.25	2.25	2.24	2.23	*-0.1%*	
AGR	*4.9%*	*4.0%*	*0.5%*	*0.1%*	*-0.4%*	*-0.6%*		
	2025	2026	2027	2028	2029	2030	Change '20-'25	Trend
Market Penetration (%)	*10.6%*	*16.7%*	*25.3%*	*36.1%*	*48.8%*	*62.9%*	*52.3%*	
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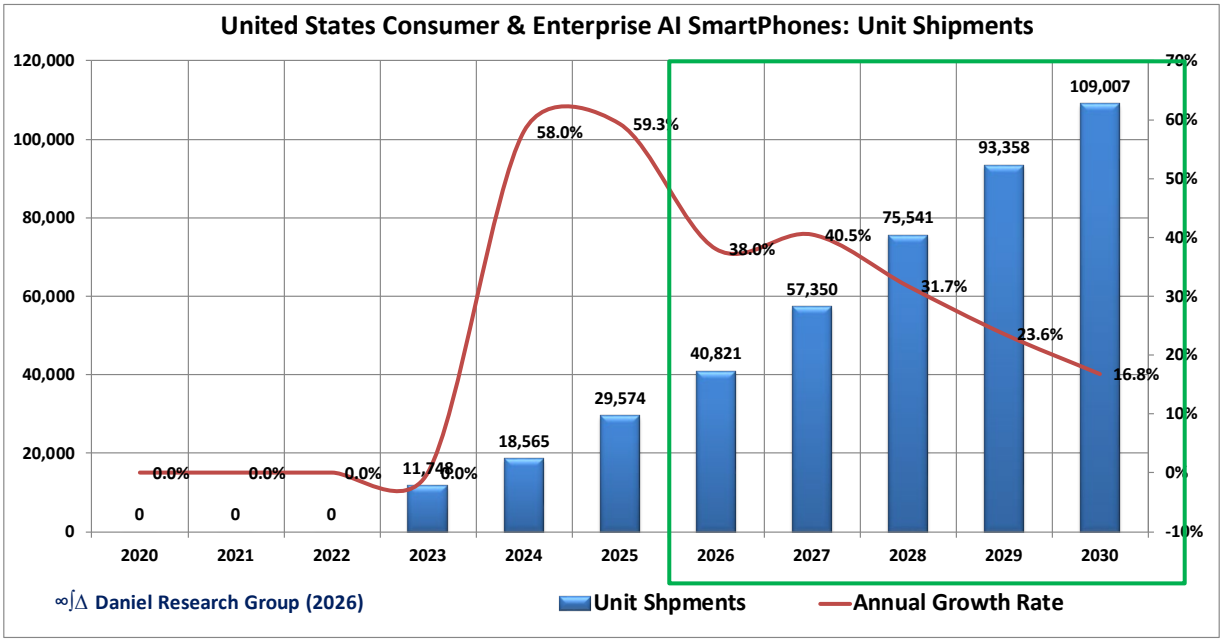


Methodology

Forecasting Approach and Process

To understand our forecast conclusions, a review of our forecast approach is necessary. Although forecasts of Unit Shipments and Revenues are of most interest to our clients, we consider these to be output results with very little predictive properties in and of themselves. Rather we base our forecasts on understanding the trends and the influences on those trends of the following primary causal variables.

- **Total Available Market (TAM)** – The number of potential buyers in the Consumer and/or Enterprise Segments.

- **Penetration** – The percent of buyers, households, and/or businesses, that have, or will, purchase the product or service.

- **Density** – the number of product or service units in use per penetrated household and/or business.

- **Replacement Rate** – rate at which users are replacing older units with new ones. This is primarily measured in terms of the Replacement Cycle Length. The length of time it would take to replace all the current units in the Installed Base given the initial size of the Installed Base, the current year Unit Shipments, and the current year number of units removed from the Installed Base.

Our forecast approach proceeds in four modeling levels.

1. **Penetration** – Top-Down Long-Term models that forecast future market penetration of the primary major products categories based on long-terms historical trends.

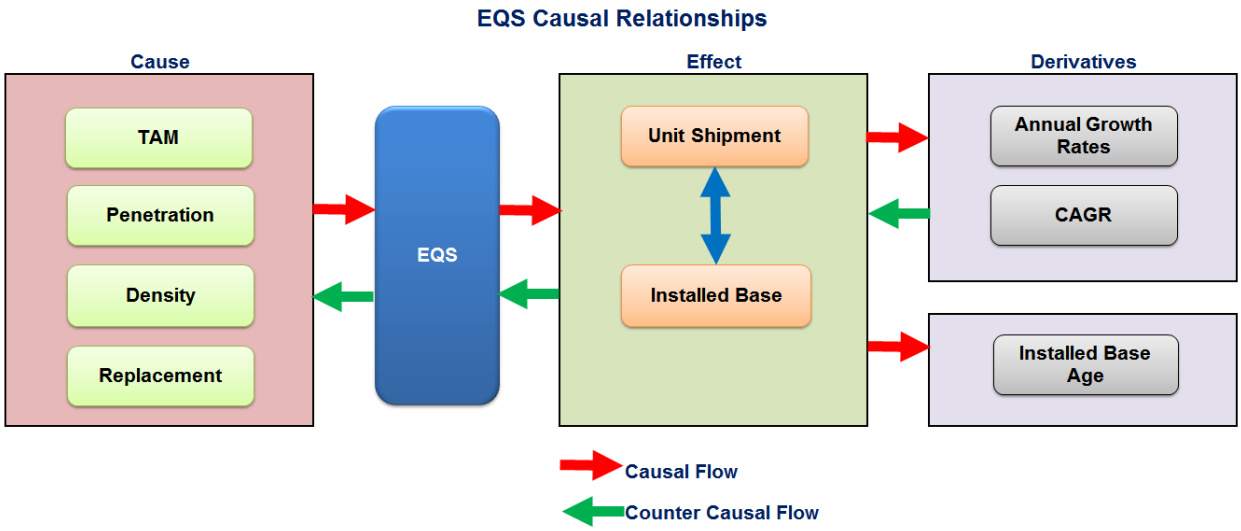
2. **Top-Down** – The primary major products are split by segment (consumer and enterprise) and form factor, as needed.

3. **Base** – Each individual product/segment/form factor forecasts are adjusted to reflect our analysis of the economic, demographic, technological, market and user behavior influencing factors.

4. **Aggregation** – The base forecasts are rolled-up to higher levels. While some of the output metrics such as Unit Shipments, Revenues and Installed Bases are additive, other such as Density, Penetration, Replacement Cycle Length, and Installed Base Age can only be computed using **DRG's** proprietary **EQS** methodology. In most models, the Base models are adjusted through a calibration step such that the roll-up matches the Top-Down for a specified metric.

Models are neat, but markets are messy. Any market model is at best an idealized simplistic version of a complex real world process. How useful any model can be is a function of how well it encapsulates the basic influencing relationships that drive cause and effect. When **EQS** models a **Causal Flow**, the four inputs compute the primary outputs: Unit Shipments and Installed Base, as well as the derivative metrics Annual Growth Rates, CAGRs, and the Installed Base Average Age. For example, an increase in the penetration rate will result in an increase in Unit Shipments and/or an increase in the Installed Base, as well as changing the derivative metrics.

When **EQS** models a **Counter Causal Flow,** the logic flows in the other direction. An increase in the Unit Shipments will require an increase in one or more of the Causal variables, as well as changes to the derivative metrics.



The strength of **EQS** as a market modeling and forecasting tool derives from two attributes:

1. The ability to run both Causal and Counter Causal logic.

2. A closed system of relationships that can only produce outputs that meet real world constraints and criteria set by the user.

Supporting Models

The **DRG Business Demographic Baseline and Forecast (BEDD)** is a database of United States Firms, Primary Firms, Establishments, and Payrolls by Private and Public Sectors, by 2-Digit NAICS industries, from 1998 to 2027. It is derived from data obtained from the US Census Bureau, the Bureau of Economic Analysis, the Bureau of Labor Statistics, the Department of Defense, and the Congressional Budget Office.

The **DRG United States AI Enabled Device Forecast 2024-2034** forecasts Unit Shipments, Revenues, Installed Base, Business and Household Penetration & Density, and Installed Base Age, Device End-of-Life-Age, and Replacement Rates for Desktop and Mobile Personal Computer, Tablets. and Smartphones. The models use currently available actual data within the **DRG** adoption model derived from similar historical device adoption statistics.

Forecast Updates

DRG will update its forecasts periodically as actual year-to-date results become available. Utilizing the **DRG ProjectionSolver and GrowthSolver** algorithms, new current year projections based on historic trended quarterly or monthly patterns are computed. Based on these projections, adjustments may be made to the primary **EQS** models.

Sources of Historical Data

Historical data was obtained from the following available sources including press releases, published reports and presentations, and publicly available databases.

Device or Metric	Unit Shipments	Installed Base/Penetration
Desktop PCs	Environmental Protection Agency IDC	Computer Almanac eTForecaster International Telecommunications Union Worldbank
Mobile PCs	Environmental Protection Agency IDC	Computer Almanac eTForecaster International Telecommunications Union Worldbank
Tablets	IDC	Pew Research Center
Mobile Phones	Consumer Technology Association Telecommunications Industry Association IDC	Cellular Telephone Industries Association Centers for Disease Control and Prevention GSMA International Telecommunications Union Organization for Economic Co-operation and Development Telecommunications Industry Association Worldbank
Households	US Census Bureau Congressional Budget Office	
Businesses	Bureau of Economic Analysis Bureau of Labor Statistics Congressional Budget Office Department of Defense US Census Bureau US Office of Personal Management	

Data obtained from a variety of sources, often using different definitions and methodologies are frequently inconsistent with each other. **DRG** employs **EQS** to identify and correct these differences and produce historic time-series of Unit Shipments, Installed Bases, Replacement Rates, Average Ages, Densities and Penetration Rates that are internally consistent with each other, and correlate highly with external quantitative data and qualitative data criteria. **DRG** believes the resulting historical baseline is the most accurate complete accounting of the US Personal Device Market from its inception in 1975.

About Daniel Research Group

Daniel Research Group is a market research and consulting firm primarily serving technology clients. Our primary focus is developing custom market models and forecasts. We support clients in three ways.

1. We work independently or collaboratively with the client's own analysts to **produce custom** technology product/service **market models and forecasts.**
2. We work collaboratively with the client's own analysts to **design and develop the modeling applications** that they will use to develop their own market models and forecasts.
3. We **train client's analysts** in the theory and practice of technology market modeling and forecasting.

Most of our work draws on the inventory of proprietary methodologies and algorithms that we have developed over more than 35 years. We have built technology market forecasting market models for many major technology vendors, market research firms, and industry organizations. While our core competency is forecasting, our subject experience covers the entire technology and technology-enabled product/service landscape. We also support our engagements with traditional qualitative and quantitative research, as well as tactical and strategic consulting services.

Stephen J. Daniel - President

With over four decades in the Information Technology Industry, Mr. Daniel has developed a unique blend of Market and Technology experience coupled with a deep understanding of Market Research Methodology. His primary strength is in understanding the decision-making context within which the results of his research will be applied. This is manifested by his ability to design and execute studies that precisely meet client objectives in a timely fashion and at reasonable costs.

Mr. Daniel received his BS in Finance from Northeastern University and earned an MBA in Quantitative Analysis from New York University. He is a member of the American Statistical Association, American Economic Association, The Market Research Association of America, the American Marketing Association, National Association for Business Economics, and the Qualitative Research Association of America.

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