

TD SYNEX Report Finds AI, Services and Specialization Are Driving the Next Wave of IT Growth

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Fourth-Annual Direction of Technology Report highlights key trends shaping the IT landscape, including insights specific to geographic regions, partner types and technology sectors

FREMONT, Calif., & CLEARWATER, Fla.--(BUSINESS WIRE)-- TD SYNEX (NYSE: SNX), a leading global distributor and solutions aggregator for the IT ecosystem, today released its Fourth Annual Direction of Technology (DoT) Report, which highlights how blending AI-driven transformation with resilient cybersecurity frameworks, deep specialization and automation-enabled talent drives growth despite persisting macroeconomic challenges. This year's edition offers a more thorough look at the market than ever before, with a new structure that provides in-depth data for geographic regions, partner types and technology sectors.

Based on feedback from more than 1,400 IT solution providers and resellers across 40 countries, the report emphasizes how service-led business models are fueling success in the age of AI, with ISVs and professional services firms expressing the most optimism about the future. Nearly 75% of partners say AI is essential to their future, making it both a competitive necessity and a catalyst for new offerings that blend innovation with core capabilities. Combined with the growing demand for skilled talent, these shifts create an opportunity for partners to redesign workflows and operating models to drive efficiency and growth in an AI-enabled future.

"As the technology industry navigates extraordinary change, our partners are facing evolving challenges, and TD SYNEX is here to help turn those into opportunities," said Patrick Zammit, CEO of TD SYNEX. "This year's DoT report shows that leadership comes from building resilience in core technologies, while leaning into next-generation technologies, services and specialization. By structuring the report around regional perspectives and partner business models, we've created a sharper lens on how to deliver value across the global technology ecosystem."

The report identifies six critical global trends shaping the IT market in 2025:

- **AI is the Foundation for Market Leadership** – As AI adoption accelerates, partners must differentiate by offering more advanced, impactful use cases like AI-powered cybersecurity (58.4%) or AI-driven automation (54.3%), which were identified by partners as solutions likely to have significant impacts on their business.

- **Cybersecurity is Fundamental, but Still a Battleground** – Security remains the price of entry to the IT ecosystem with 80% of partners offering at least one cybersecurity solution. It has also emerged as the leading growth driver for endpoint solutions over the past two years, and partners are doubling down, ranking advanced endpoint security as their second-highest priority for new offerings in the year ahead. However, challenges remain top-of-mind as partners identify emerging threats like AI-driven attacks (49.2%) and data breaches (41.9%) as top concerns.
- **Specialization Beats Scale** – Industry expertise and consultation is the #1 factor that end customers look for in a partner, with exceptional customer service following closely in second. Partners are already adapting to this market expectation, with 90% planning to offer support and maintenance services, 88% planning to deliver custom IT integration and 82% planning to expand managed services in the next year.
- **Redesigned Operating Models for the AI Era** – Nearly 70% of leaders are experiencing talent shortages, which they say directly affects AI (43%), data & analytics (41%) and cybersecurity (39%) implementations. This signals an industry-wide shift in how work gets done and serves as an opportunity for partners to redesign operating models and workflows to drive efficiency for an AI-enabled future.
- **Macroeconomic Challenges Persist, but Growth is Still Possible** – Despite global headwinds, the growth outlooks remain positive in most regions with 66% of partners reporting revenue increases. Companies that combine strategic foresight with operational agility are best positioned to achieve growth.
- **The New Winners: Service-Led and Future-Ready** – ISVs (120) and Professional Service firms (110) are pulling ahead as industry growth leaders, as demonstrated by the Net Growth Index. This is due to their efforts to build balanced portfolios, with more than half blending fast-growing capabilities like artificial intelligence and data & analytics with core offerings.

TD SYNEX has also introduced two new indices – the Net Growth Index and the Net Optimism Index – to better understand partner performance and sentiment across geographies and partner types, with the ability to track this evolution year-over-year in future report iterations. Both indices use a baseline score of 100, with scores above 100 indicating increased growth or optimism and scores below 100 reflecting stagnant growth or pessimism.

“Now in its fourth year, the Direction of Technology report continues to evolve alongside the market it reflects,” said **Jill Kermes, Corporate Vice President, Global Corporate Communications and Citizenship at TD SYNEX**. “Each edition provides new perspectives and practical insights to help our customers navigate complexity and seize opportunity. This year’s findings underscore that the next wave of growth will come from those who are reimagining business models and harnessing AI, services, and specialization to shape what comes next.”

The full report is available at <https://content.tdsynex.com/dot/>.

About TD SYNEX

TD SYNEX (NYSE: SNX) is a leading global distributor and solutions aggregator for the IT ecosystem. We’re an innovative partner helping more than 150,000 customers in 100+ countries to maximize the value of technology investments, demonstrate business outcomes and unlock growth opportunities. Headquartered in Clearwater, Florida, and Fremont, California, TD SYNEX’s 23,000 co-workers are dedicated to uniting compelling IT products, services and solutions from 2,500+ best-in-class technology vendors. Our edge-to-cloud portfolio is anchored in some of the highest-growth technology segments including AI, cloud, cybersecurity, big data/analytics, IoT, mobility and everything as a service. TD SYNEX is committed to serving customers and communities, and we believe we can have a positive impact on our people and our planet, intentionally acting as a respected corporate citizen. We aspire to be a diverse and inclusive employer of choice for talent across the IT ecosystem. For more

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