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Education Technology Suite of Services

2023

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DIGITAL TRANSFORMATION SHAPING 21ST CENTURY LEARNING

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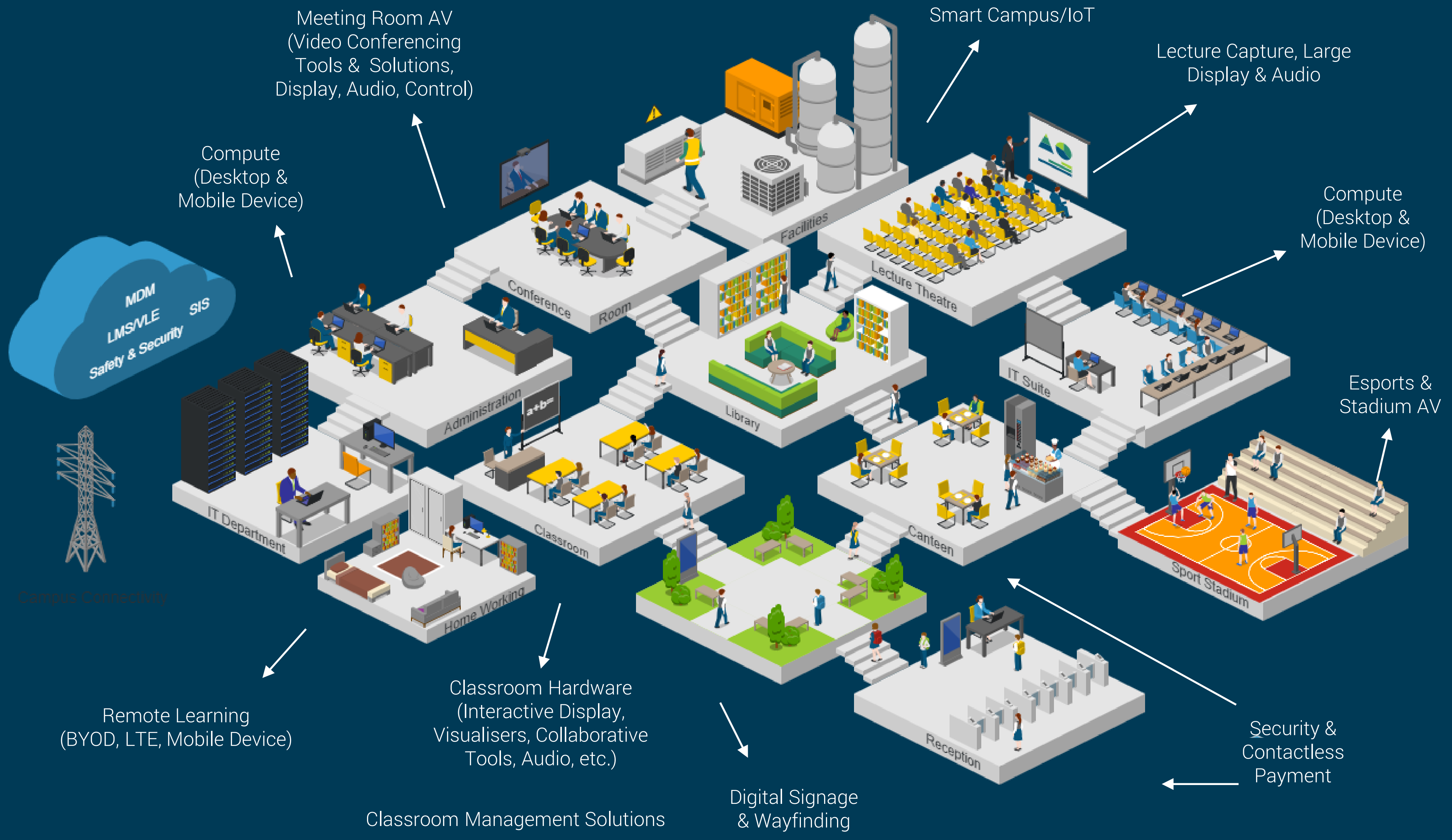
Now more than ever, the deployment of technology to support learning and collaboration is vital – especially in creating a future for students that delivers personalised experiences that build on students' strengths, skills, and interests.

Futuresource recognises that not all institutions are the same, digital transformation programs augment and build upon existing capabilities and skillsets, there is no one-size-fits-all approach.

Futuresource's education research is built around this reality, enabling clients to explore the full extent of the EdTech opportunity as hardware, software, content and infrastructure converge and technical progression continues to influence the behaviour of teachers and students like.



ESPORTS IN EDUCATION [NEW]

Adoption of esports in education is expanding rapidly across the world. Despite the rise in student participation, investment levels vary. However, the vast amount of marketing material produced on esports in education is making it increasingly difficult for leading players to determine the actual level of opportunity that esports presents.

This report quantifies the demand for esports IT hardware across K12 and Higher Ed now and over the next five years. It explores the regional purchasing behaviours of schools and universities, describing the drivers of esports adoption and the barriers that remain – particularly in K12.

Key features of the report:

- Inclusivity and safeguarding in esports
- Methodology: Futuresource conducted interviews across the esports supply chain to build a solid understanding of the current and future trends, market sizing and opportunities presented by the esports segment.
- In order to ensure a complete view of the market and understanding of the sector, 650 end-user interviews with schools and universities were also undertaken.

Data Segmentation

- Market Sizing: the global installed base of PCs used primarily for esports in K-12 and Higher Ed institutions.
- Market Forecasting: a five-year PC installed base forecast, reviewing key drivers and barriers to adoption across key markets
- Investment & Project Status: identifying the key purchasing behaviours in K-12 and Higher Ed, including the role of parent fundraising.
- Product, Technology & Competitive Review: discussing key market developments and trends, including the adoption of PC gaming accessories.
- Country-level Dynamics: detailed discussion of key factors impacting the adoption of esports in K-12 and Higher Ed within: China, India, South Korea, Oceania; Japan; Singapore, LATAM, MEA, Western Europe and North America

Key Questions

- Which country holds the largest installed base of esports PCs in K-12 and Higher Education, respectively?
  - How will this develop over the next 5 years?
- What is driving the adoption of esports in K-12? What barriers remain?
- Which countries have/are planning to incorporate esports into the K-12 curriculum, and why?
- How is the evolution of esports' perception within HiEd impacting purchasing dynamics?
- What are the purchasing priorities for esports equipment in K-12 and Higher Ed, respectively, over the next 3 years?

SUSTAINABILITY IN EDUCATION [NEW]

Futuresource's Sustainability in Education report provides an assessment of the opportunity and market potential for sustainability to impact business development of most IT companies.

The report defines "sustainable device" and what sustainability for educational technology means, as well as reviews the main sustainability features of the "green" devices in Education.

A key deliverable of this report is to quantify the global installed base of mobile PCs and desktops in K-12 and Higher Ed institutions to quantify the size of sustainable device market in Educational Technology mobile PC and desktop segments.

Key features of the report:

- Product, Technology & Competitive Review: to identify and interpret key trends that shape the adoption of sustainable devices. Investigating to what extent this is being achieved across global markets, highlighting leading barriers. Review how different Educational Technology players are prioritising sustainability
- Labels and certifications: Energy Star, EPEAT, TCO and how they evolve and transform sustainability features of PC devices.
- Sustainable procurement. Identify key purchasing behaviours of sustainable devices in K-12 and Higher Ed. Case studies: New UK sustainability policies, Nordics, US. Purchasing consortiums.
- Methodology: Primary research with PC OEMs, distributors/resellers, IT sustainability certification bodies, end user feedback research.

Data Segmentation

- Geographical Coverage: Global with focus on North America and Western Europe
- Five-year forecasts: Across all data points
- K-12 and Higher Ed PC Installed Base Forecast by Region
- Percentage of Sustainable Devices in each device type (Notebook, Chromebook, Tablet, Desktop)
- Higher Ed Sustainable PC Installed Base Forecast by Region
- Drivers and Barriers to Sustainability Agenda in K-12 and Higher Ed by Key Region

Key Questions

- Which country holds the highest, K-12 installed base of sustainable devices?
- Which country holds the highest, Higher Ed installed base of sustainable devices?
- What are the key certifications/metrics to track the penetration of sustainable devices?
- Which brand initiatives are impacting adoption of sustainable devices by K-12 Higher Education institutions?

DESKTOP IN K-12 EDUCATION MARKET REPORT

The Covid-19 pandemic saw K-12 PC investment focus switch to mobile devices to facilitate remote working and limit lost learning. However, the return to in-person schooling has produced an upturn in investment in classroom technologies that were neglected during the lockdown periods, such as displays and desktop PCs. Although mobile solutions remain dominant, there remains a need to refresh desktop PC fleets as some schools remain focused on a shared device model. In addition, the use cases for desktops, such as CAD Design, Robotics, E-sports and VR/AR, require increasingly more powerful devices.

This standalone report complements Futuresource's existing K-12 Mobile PC tracking service, providing market sizing for institutional desktop purchases and forecasts for 20 key countries and four regions globally.

Futuresource's analyst team will engage in a dedicated primary research program speaking to hardware providers and channel partners to assess the scale of institutional desktop demand and to understand the key issues shaping the market

Key features of the report:

- Quarterly analysis and five-year forecasts - volume and value
- Brand Splits by form factor
- Brand Share –key market developments and trends at an OEM level
- Market splits by country
- Price point
- Workstations and traditional desktops
- Application (computer lab/libraries/office use/esports)
- Vendor market share

Data Segmentation

- **Geographical Coverage: Americas** – USA, Canada, Mexico, Brazil, and Rest of South America. **Europe** – France, Germany, Italy, UK, Spain, Benelux, Scandinavia, Russia, Rest of Europe. **META**- Turkey, South Africa, rest of Africa, Rest of Middle East. **APAC**- Australia, China, Japan, Korea, India, Indonesia, Rest of APAC.

Key Questions

- How large is the desktop PC market (in the 20 countries covered) and how will this change over the coming five years?
- Who are the key players within this market?
- How will adoption change over the forecast period?
- What will be the key catalysts to investment in desktop PCs or the roadblocks to investment?

K-12 BYOD MARKET SIZING

Futuresource has been tracking, analysing and consulting on developments in the global EdTech market for over 20 years. A growing trend in certain regional markets is the drive to bring your own device to school (BYOD) - a parent funded purchasing model for 1:1 mobile device deployment.

BYOD is starting to impact how vendors approach the education market as the channels in which these devices are purchased can differ from institutional sales. Equally, the purchase decision making criteria or added value sales opportunity when driven by a parent purchase can provide new opportunities for vendors.

To forecast future demand for computing devices in schools and manage the supply chain, understanding the total addressable market and penetration in schools is vital and tracking the rate of change of the BYOD trend is key.

Key features of the report:

This report provides a complete view of the demand for PCs in K-12 schools across six country markets. It also explores how attitudes to BYOD are evolving following the Covid-19 lockdowns, particularly with regards to the deployment process.

Industry interviews with large retailer HQs, education channel partners and leading vendors in education across the 6 countries listed. Interviews with government education departments and central purchasing bodies will also be conducted to understand the future support for BYOD in schools. This report is designed to accompany the parent and school survey data from the BYOD Market Report

FIND OUT MORE

Data Segmentation

- 5-year forecasts
- Geographical Coverage: Japan, India, Australia, USA, UK, Germany
- Total K-12 penetration of devices to students
- Annual K-12 mobile PC shipments to schools vs BYOD split by: Elementary, Middle and High School and by device-type
- BYOD market sizing in the K-12 mobile PC market

Key Questions

- What % of PCs entering the K-12 classroom are through BYOD initiatives? How does this change by school-level?
- What deployment strategies are schools employing for BYOD, and how is this evolving?
- How has Covid-19 impacted attitudes towards BYOD?
- What brands and device types are favoured for BYOD initiatives?

IFPD LESSON DELIVERY SOFTWARE ECOSYSTEM MARKET

Interactive displays have been the preferred technology to support remote and hybrid learning by educators. This is mainly due to the interactive displays' enabling software, or LDS, as teachers have had to grapple with creating engaging content, often without being able to fully utilise the classroom.

This report will provide those working in the industry with an understanding of IFPD market trends and positioning, LDS and LMS ecosystem and dynamics, and competitive landscape.

Key features of the report:

- LDS Market Overview
- IFPD Market Trends and Product Positioning
- LDS Competitive Landscape
- Government Initiatives
- LMS Market Overview
- LMS Competitive Landscape

FIND OUT MORE

Data Segmentation

- LDS Market Overview
- IFPD Market Trends and Product Positioning
- LDS Competitive Landscape
- LMS Market Overview
- LMS Competitive Landscape
- Geographical Coverage: AMERICAS, APAC, EMEA

Key Questions

- Competitive landscape – how does LDS offering vary?
- Who are the leading players within the LDS ecosystem in Europe and North America?
- What are the government initiatives to support further IFPD adoption?
- What are the mega IFPD market trends?
- What are the mega trends within LDS ecosystem?
- What is driving demand for LDS in education market?

LTE IN EDUCATION MARKET

While the connectivity divide has been present in education long before the Covid-19 pandemic struck, virtual learning and hybrid classrooms have brought internet connectivity to the forefront of the EdTech industry. As a result, the interest in mobile network connectivity, such as 4G, Long-Term Evolution (LTE) and 5G within K-12 has gained further momentum, triggered by the move towards distance learning and the long-term plans for a hybrid teaching model.

This report provides an assessment of the opportunity for mobile connected devices in the K-12 market over the coming five years.

Assessment of the opportunity for mobile network connected devices in the K-12 market over the coming five years. Quantification of the opportunity for connectivity, including a review of the key barriers and drivers to adoption, and the opportunity for additional related services.

Key features of the report:

This report will focus on the growing interest in mobile connectivity, such as 4G, Long Term Evolution (LTE), and 5G triggered by the move towards long distance learning and long-term plans for hybrid learning.

FIND OUT MORE

Data Segmentation

- **Areas of Focus:** K-12 Mobile, Wi-Fi Hotspots, Dongles
- **Country Analysis:** USA, Japan, Germany, Peru, Italy and South Korea.
- **Verticals:** LTE Deployment Vs Activation, LTE Deployment Analysis & Key Factors, Telco Funding Model

Key Questions

- What is the opportunity for mobile connected devices in the K-12 market?
- What are the key barriers and drivers to the adoption of LTE?
- What are the government plans in relation to LTE enabled devices?
- What is the sales volume and installed base of LTE enabled devices in the K-12 education by country?

CLASSROOM ORCHESTRATION SOFTWARE

Futuresource's Classroom Orchestration Software report provides an assessment of the opportunity for device management and student safeguarding software solutions in the K-12 market over a five-year forecast period. The report quantifies the opportunity for software sales, including a review of the key barriers and drivers to adoption, and how these areas will develop over the forecast period.

This report covers the current situation and market outlook for orchestrator software that facilitates web filtering, classroom management, student safeguarding, single sign-on, and mobile device management.

The shift to online learning has exposed schools to threats that they weren't equipped to deal with. However, the landscape is changing, and schools are now investing in security awareness and staff training, as well as prevention and detection systems to ensure security is a core part of their future strategies.

Key features of the report:

- Market size and forecasts for all five classroom orchestration software segments
- Key market developments and trends
- Breakouts for North America, Europe, Asia Pacific and China, Latin America, and Middle East and Africa

FIND OUT MORE

Data Segmentation

- Regional Coverage: North America, Europe, APAC, LATAM, MEA
- Areas of Focus: Web Filtering, Classroom Management, Student Safeguarding, Single Sign-On, Mobile Device Management
- Report Coverage & Key Areas of Focus: Market Size ($ Value) By Region, Five-Year Market Forecasts, Review Of The Adoption Of Devices By Region, Device Management And Security Drivers And Barriers To Adoption, End User Feedback On Device Management And Security

Key Questions

- What is the level of investment for classroom orchestration software in the K-12 market?
- How is demand for devices driving demand for mobile device management, single sign-on and safeguarding software?
- What factors are driving demand for deployment of classroom orchestration software, and what are the core barriers to adoption?
- What challenges are the different software segments trying to address?

Market Trackers

K-12 Coverage

MOBILE PC IN K-12 MARKET TRACKER

Futuresource has been tracking, researching and consulting on the global education technology market for nearly 20 years. This publication is one in a series of research reports produced to provide businesses with a holistic view of the market.

As educational device demand begins to soften, after achieving global record high shipments in 2021, access to accurate market data becomes even more critical for businesses operating within the education technology sector.

This report reviews market performance in each quarter and the factors shaping the development of the K-12 Mobile PC Market.

Key features of the report:

Market Sizing - to quantify and track quarterly, global sales volumes and installed base of notebooks, Chromebooks, netbooks and tablets in K-12 education, reviewing key feature set developments.

Market Forecasting - to develop five-year sales forecasts.

Investment & Project Status - to identify shifts in education spending, government plans and specific tenders.

Product, Technology, & Competitive Review - to identify and interpret key market developments and trends.

FIND OUT MORE

Data Segmentation

- **TAM Analysis:** Number of Students & Teachers, Private /Public Enrolment, Pre-Primary/Primary/Secondary, Number of Classrooms
- **Market Data:** Volume, Installed Base, Penetration, with five-year forecasts for all these categories
- **Country Coverage:** 48 Countries Reviewed, Large Scale Tender Tracking by Country
- **Product Coverage:** Notebook, Netbook, Tablet, Chromebook
- **Brand Details:** 12 Brands Reviewed (and 'Others' Group)
- **Specification Analysis:** Operating System, Screen Size, Price Brand, Form Factor

Key Questions

- What is the size of the K-12 mobile computing market now and in five years, by country?
- What notable projects have been delivered/are expected?
- Which device types and operating systems are in most demand?
- Which countries are investing in 1:1 learning programs?

INTERACTIVE DISPLAYS MARKET TRACKER

Futuresource's well-established Interactive Displays quarterly market tracking service is based on actual sell-in volume data from vendors.

The service covers both Interactive Whiteboards (IWB) and Interactive Flat Panel Displays (IFPD) in the Education and Corporate sectors.

Coverage is global, across 67 markets, and includes:

- Quarterly sell-in volumes, by brand for IWB and IFPD, split by the Education and Corporate verticals.
- Historical and forecast annual IWB and IFPD market value data by key world region (Americas, APAC, EMEA) and vertical (Education and Corporate).
- Annual K-12 classroom penetration data (historical and forecast).

Key features of the report:

- Historical and forecast sell-in volume data is delivered in Futuresource's custom-made Analyzer pivot software platform, supported by Excel pivots and files, if required by clients.
- Forecasting including five-year sales forecasts by country
- Product, technology and competitive review to identify and interpret key market developments and trends

FIND OUT MORE

Data Segmentation

- **Display Technologies:** IWB, Interactive Flat Panel, Interactive Projectors
- **Historical Global Brand Share Data**
- **Territory:** Country Level Data for all Metrics
- **Five-year Forecasts Across all Data Points**
- **Key Metrics:** Volume, Value and Brand Share
- **Sector Updates for Education and Corporate**
- **Product Pricing**

Key Questions

- What is the Interactive Displays brand performance by country and market segment?
- Which product specifications and technical features are performing well in which markets?
- What are the key issues for Interactive Displays in Education?
- How large in volume and value is the Interactive Displays market and how is it performing?
- What is the impact of the major global brands on the Corporate meeting room markets?

End User Reports

K-12 Coverage

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ED TECH VOICE END USER PROGRAMME

OVERVIEW

- Futuresource's Ed Tech Voice suite of services explore the impact and return on investment of education technology in schools monitoring both current adoption levels and planned future investment.
- As well as conducting interviews with 400 IT decision-makers and 400 curriculum leads in the USA, the four individual reports.

REPORT COVERAGE

- End user research into the investment priorities and unmet wants and needs of US K-12 districts.
- Focus on IT infrastructure, courseware and learning tools.
- Provides an understanding of key end user trends and developments for any company seeking to expand its knowledge of the EdTech sector.
- New to 2023 – Europe Coverage

KEY DELIVERABLES

Delivered as a suite of four comprehensive PDF reports with commentary, insights, data sets and charts

Analyst helpline and regular onsite/online debriefs

ED TECH VOICE – CLIENT DEVICE COMPUTING

Whilst the supply side of the market continues to innovate and develop at pace, questions still exist around the impact and return on investment of EdTech on a consistent basis in schools. Understanding the current adoption levels of EdTech remains a key challenge, due to the number of vendors and multitude of options currently available to schools.

The Client Device Computing report is the first of 4 reports, outlining the findings from a large-scale interviewing process with US K-12 School Districts.

Representative end user panel of 400 in-depth interviews with District IT Purchasers.

This report focuses on the current and projected ownership of desktop PCs, laptops, Chromebooks and tablets, as well as the key priorities and obstacles faced.

Key features of the report:

- Feedback on the current usage of EdTech in schools and planned investment of computing devices.
- Insights into which factors are most important to schools when investing in computing devices and their planned future purchases.
- Barriers to investment are also explored, as well as key methods of procurement.
- EdTech market analysis
- EdTech market size

FIND OUT MORE

Data Segmentation

- **USA coverage:** Geographic Region (East/Central/West), District Size (Small, Medium & Large Districts)
- **Information Provided:** Awareness of market price points, brand of hardware owned, OS choice by school level, factors impacting device choice, computer use cases (i.e. shared/1:1), current and future role of BYOD, e-ink / digital pen usage, % of devices taken home, unmet feature wants and needs, & existing spend

Key Questions

- How is IT budget split by product category and school size?
- What does future investment look like for esport devices?
- How are operating systems split across mobile and desktop?
- What remains the most popular choice of device in use cases around students - both in and outside the classroom?
- What pricing changes can we expect for devices over the next two years?

ED TECH VOICE – AUDIO VISUAL DEVICES

Understanding the current adoption levels of EdTech in K-12 schools along with planned investment across a range of topics from client devices to digital courseware is often challenging due to the number of vendors and multitude of options offered to schools.

With so many factors influencing the final purchase of EdTech devices, this report provides feedback on the current usage of EdTech in schools and planned investment, specifically Audio-Visual Devices. This report provides an insight into which factors are most important to schools when investing in Audio-Visual Devices and their planned future purchases.

This report will focus on current/projected ownership of the following technologies as well as key issues faced:

Key features of the report:

- This classroom audio visual devices report is based on 400 interviews with district IT decision makers in the USA. The respondents represent all 50 states, grouped by East Coast, West Coast and Central states.
- Feedback on the current usage of EdTech in schools and planned investment in classroom AV and classroom audio systems
- Insights into which factors are most important to schools when investing in classroom audio visual systems and their planned future purchases
- Barriers to investment are also explored, as well as key methods of procurement

FIND OUT MORE

Data Segmentation

- **Geographical coverage:** US only (East/Central/West), District Size (Small, Medium & Large Districts)
- **Information Provided:** Number of classrooms / large meeting spaces, brand of hardware owned, factors impacting device choice, classroom penetration by device, common features used, display use cases (i.e. teacher led/student led), key unmet feature wants and needs, existing spend & future planned usage model.

Key Questions

- What is the current and projected ownership of AV devices?
- What is the classroom penetration by devices?
- What features are commonly used?

ED TECH VOICE – CLASSROOM TOOLS

This report provides an insight into which factors are most important to schools when investing in these technologies and their planned future purchases. Barriers to investment will also be explored and key methods of procurement.

The main areas within this report include feedback on the current usage of EdTech in schools and planned investment of classroom tools.

This classroom tools report is based on interviews with school curriculum leads in the USA. The respondents represent all 50 states, grouped by East Coast, West Coast and Central states. It focuses on the current and projected ownership of interactive classroom technology tools, Learning Management Systems (LMS), productivity software, STEM technologies and adaptive learning software, as well as the key priorities and obstacles faced.

Key features of the report:

- Feedback on the current usage of EdTech in schools and planned investment in classroom tools
- Insights into which factors are most important to schools when investing in classroom tools and their planned future purchases
- Barriers to investment are also explored, as well as key methods of procurement
- EdTech market analysis
- EdTech market size

FIND OUT MORE

Data Segmentation

- **Representative end user panel** of approx. 400 in-depth interviews with Curriculum Leads.
- **Geographical Coverage:** US only (East/Central/West), District Size (Small/Medium/Large Districts)

Key Questions

- Which LMS solutions have been most widely adopted by brand and what are schools' satisfaction with the tools they have?
- What % of schools have invested in Learning Management Systems?
- How important is STEM learning and which disciplines are adopting technology to help learning?
- Which personas have the greatest impact on purchasing decisions when it comes to classroom tools?

ED TECH VOICE – ADMINISTRATIVE TOOLS

This report will focus on the current and projected ownership of key technologies: SIS (Student Information Systems) and ERP (Enterprise Resource Software) as well as crucial issues faced by schools in their use.

The pandemic highlighted not just the need for technology for students and teachers to interact, but the role EdTech can play in collaborative learning and connectivity. Even with the pandemic behind us, those changes still remain.

This report explores the position of education administration tools within the K-12 universe and is based on interviews with school curriculum leads in the USA. Respondents represent all 50 states, grouped by East Coast, West Coast and Central states. It focuses on the current and projected ownership of administration tools, including school information systems (SIS) and communication tools, as well as the key priorities and obstacles faced.

Key features of the report:

- Feedback on the current usage of EdTech in schools and planned investment in administration tools
- Insights into which factors are most important to schools when investing in administration tools and their planned future purchases
- Barriers to investment are also explored, as well as key methods of procurement

FIND OUT MORE

Data Segmentation

- **Geographical Coverage:** US only (East/Central/West), District Size (Small/Medium/Large Districts)
- **Representative end user panel** of approx. 400 in-depth interviews with Curriculum Leads.

Key Questions

- What factors are most important to schools when investing in administration software and their planned future purchases?
- What are the barriers to investment?
- What are the opportunities for vendors?
- Which factors are most important to schools when investing in administration software?

K-12 BYOD END USER MARKET REPORT

Understanding the total addressable market and penetration of the BYOD trend in schools is a vital component to forecasting future demand for computing devices and managing the supply chain. Which channels these devices are purchased through and what factors most influence decision-making for parents all present a host of new and exciting opportunities for vendors.

This report focuses on major ed tech countries or territories where BYOD (Bring Your Own Device) is understood to be significant or about to become significant.

The findings are drawn from two separate research programs:

- School Survey: to forecast future demand for computing devices in schools, understand the total addressable market and track the rate of change of the BYOD trend
- Parent Survey: to understand attitudes towards BYOD deployment, purchasing behaviour and specification/brand preferences.

Key features of the report:

- Market size and overview
- Products purchased
- Purchasing behaviour
- Device specification

FIND OUT MORE

Data Segmentation

- **Geographical coverage:** UK, USA, Germany, India, Australia, Japan
- **Five-year market outlook:** OEM market share by laptop and tablet devices, typical specs recommended by school grade, key channel partners servicing BYOD, and business /payment models
- **Key information:** Preferable brands, desirable features, sought after changes, recommendations.

Key Questions

- **Parent Survey:** Was the device purchased through the school or direct from a retailer/reseller?
- Was there freedom of choice of device (s) purchased?
- Did the school specify a selection of brands to choose from or only one - did this differ according to notebook and tablet?
- **School Survey:** What is the % split of the BYOD market between public & private schools?
- What are the key deployment strategies for BYOD and which of these is the most successful?
- What % of parents purchase direct from a retailer/manufacturer?

Market Trackers

Higher Ed Coverage

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HIGHER EDUCATION PC MARKET TRACKER

This higher education PC market report reviews sector performance and explores the issues that will influence the development of the higher education market over the next five years. The report is based on Futuresource Consulting's education technology market research and forecasting, along with direct institutional feedback collected from interviews with IT decision makers at 604 universities across 20 territories.

Territories covered by this report are China, USA, India, Brazil, Japan, Mexico, Germany, UK, Australia, Russia, Canada, France, Spain, South Korea, Italy, Netherlands, Sweden, Norway, Denmark, and South Africa.

Key features of the report:

- Notebooks, Chromebooks, desktops and tablets sold into higher education
- Higher education PC market sizing, to quantify and track quarterly global sales volumes and installed base
- Market forecasting, with five-year sales forecasts, reviewing key feature set developments
- The status of investments and projects, to identify shifts in education spending, government plans and specific tenders
- The product, technology, and competitive landscape, providing a review that identifies and interprets key market developments and trends

Data Segmentation

- **Devices:** Desktops, Notebooks, Chromebooks, Tablets
- **Report Coverage:** Market Sizing, Market Forecasting, Investment & Project Status, Product, Technology, & Competitive Review
- **Research sources:** Channel interviews, Institutional interviews
- **Market Indicators Researched:** Desktop and Mobile PC shipments – five-year forecasts, Major OEM brand shares, Shares by OS, screen size and price bands

Key Questions

- How large is the Higher Education mobile PC market (in the 20 countries covered) and how will this change over the coming five years?
- How has the shift to online learning impacted investment in PCs?
- What are the key government funding initiatives?
- Which brands are impacting the Higher Education PC market and development by form factor?
- What are the purchasing intentions of the Higher Ed Institutions in the next five years?

End User Reports

Higher Ed Coverage

HIGHER EDUCATION END USER MARKET

This multi-client annual research study provides invaluable insights about existing technology ownership levels and future investment plans for higher education institutions in North America and Europe.

This report will also provide detailed information regarding the Total Addressable Market (TAM), including the number of students/admin/staff, number of lecture rooms and admin rooms. Typical technology utilisation by room type will also be profiled.

Representative end user panel of 300 in-depth interviews with IT Purchasers at Higher Education institutions in the USA and Western Europe.

Key features of the report:

- This report provides universe sizing data and analysis of computing devices and other technologies within the Higher Education sector.
- IT Technologies: PC Devices, Student Information Systems/Learning Management Systems, and Cloud Services
- AV Technologies: Classroom Displays, Collaborative Devices (conferencing/content sharing), and Lecture Capture Equipment.

Data Segmentation

- **IT Technologies:** PC Devices, Immersive Technologies (VR/AR), Cloud Services & Smart Campus Solutions
- **AV Technologies:** Classroom Displays, Collaborative Devices, Lecture Capture Equipment & Classroom Audio
- Total Addressable Market
- Purchase and Channel
- Budget and Spend

Key Questions

- What is the TAM in North America and Western Europe?
- What are the key investment priorities for HEd institutions?
- Who influences HEd purchases?
- What is the spend breakdown between IT and AV?

Product & Services

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ED TECH | PUBLICATION SNAPSHOT

K-12 | *Higher Education*

Q1
- Esports in Education
- K -12 Mobile PC
- Interactive Displays
- Hi-Ed PC

Q2
- Sustainability in Education
- BYOD Market Sizing
- Ed Tech Voice - AV Devices
- Ed Tech Voice - Computing Devices
- K -12 Mobile PC
- Interactive Displays

Q3
- Ed Tech Voice - Administrative Software
- K -12 Mobile PC
- Interactive Displays
- Hi-Ed PC

Q4
- BYOD End User
- Ed Tech Voice - Classroom Tools
- K -12 Mobile PC
- Interactive Displays
- Higher Ed End User

Market Reports   End-User Reports   Market Trackers

SERVICE OVERVIEW

OVERVIEW

- Explore the full extent of the EdTech opportunity as hardware, software, content and infrastructure converge, and technological progression continues to influence the behaviour of teachers and students alike.
- For more than 15 years, companies operating in the education vertical have relied on our detailed analysis, forecasting and insights to make meaningful and measurable strategic decisions that keep them ahead. Spanning the entire education supply chain, including IT decision maker and end user analysis, our EdTech research and reporting services offer you the fast track to new opportunities on a global scale.
- Learn how our suite of EdTech services can support your business.

AT A GLANCE

- Technology adoption levels, drivers and barriers by country
- Decision making and budgeting structures by country
- Ongoing, planned and historical investment programs
- How technology projects are funded and implemented
- The impact of political issues on technology adoption
- The structure of the EdTech supply chain
- End user and decision-maker attitudes and behaviours to EdTech

KEY DELIVERABLES

Comprehensive PDF report with commentary, insights, data sets and charts

Granular Excel data sheets with market metrics

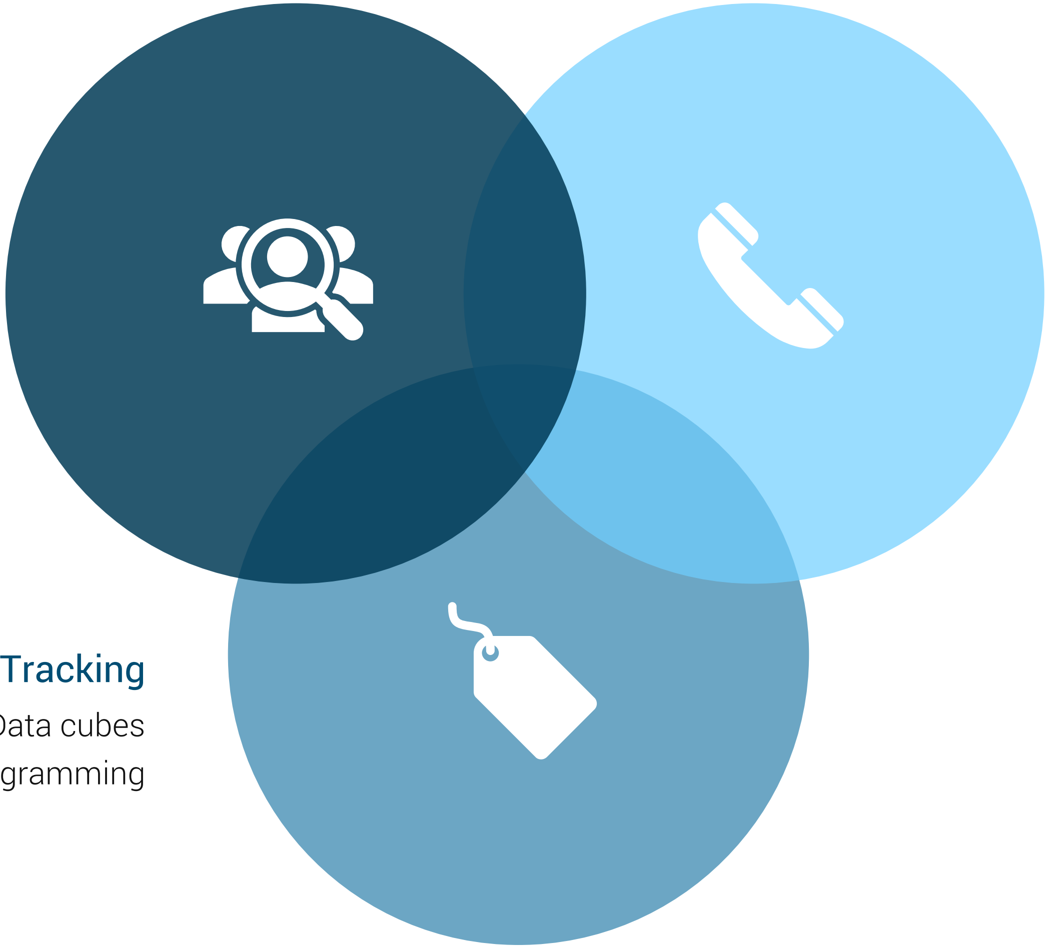
Analyst helpline and regular onsite/online debriefs

OUR METHODOLOGIES

Futuresource carry out a number of mixed methodology programmes with a heavy focus on quantitative data, in order to provide a trusted, 360-degree view of each industry. From bespoke custom projects through to multi-client subscription services, our expert market analysts work side-by-side with the quantitative research team to deliver actionable insights, underpinned by a range of stringent methodologies.

Consumer Research

Quant / qual data:
Online surveys
Telephone surveys
Focus groups
Diary Studies



Industry Research

Primary & secondary research:
Expert interviews
Direct data feeds from vendors
Trade associations
Government statistics

Price / Stock Tracking

Data cubes
Data programming

END USER REPORTS

Living with Digital

Kids Tech

Audio Tech Lifestyles

Smart Home

Shopper Journey

Enterprise AV Decision Maker

NEW Hybrid Work End-User

Content Creator

Higher Education Survey

Bring-Your-Own-Device

Esports

Ed Tech Voice Programs

AV Devices, Computing Devices, Administrative Software, Classroom & Assessment Tools

OUR USPS IN CONSUMER RESEARCH

With over 30 years in the market research space, Futuresource Consulting's diverse team of expert analysts offer a deep understanding of international & local nuances.

We combine rich industry perspectives with consumer research to deliver a holistic view of the sectors we cover - aligning our market expertise with quant & qual methodology

We have extensive experience of custom research on behalf of leading global players across all key sectors, including consumer electronics, entertainment, education technology & the professional AV industry.

Our reputable international panel providers across online & mobile have been extensively verified and profiled to ensure the highest level of provision and reliability.

CUSTOM RESEARCH

Outside of our syndicated end user reports, we offer a flexible approach to delivering the level of insights best suited to your business needs.

Can't find the market insights you're after? Work with us to build a bespoke research project tailored to your specific needs.

Our custom projects provide meaningful and actionable insights, through a blend of the methodological expertise of our quantitative research team, the industry expertise of our analysts, and our existing industry data.

CONTACT US

futuresource CONSULTING

| IN SUMMARY

Futuresource Consulting is a market research consulting company that provides a range of specialist intelligence reports and ongoing personal debriefs to support with business decision-making. We pride ourselves on delivering fact-based insights and market forecasts on a global scale – advising on strategic positioning, identifying key trends, analysing competitors, and underpinning major technological developments.

ENQUIRE HERE

OUR EXPERTISE

| Full service end-to-end research capabilities

| Global market coverage based on informed local expertise

| Delivering excellence for over 30 years

| Leading-edge data delivery and analysis

| Unrivalled client list, maintained through client-centred service approach

Company Registration No: 2293034

futuresource CONSULTING

About Futuresource

Futuresource Consulting is a specialist research and knowledge-based consulting company with a heritage stretching back to the 1980s.

Its insight and global market coverage are based on informed regional expertise, ensuring its portfolio of world-class clients is fully supported in research, analysis, strategic planning and decision making.

- Consumer Electronics
- Content & Entertainment
- Enterprise & Professional AV
- Education Technology
- Professional Broadcast
- Automotive

Talk to us…

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