

Education Technology Suite of Services

2025

TABLE OF CONTENTS

| B2B Service Overview

| K-12 Market Reports

- Esports In Education
- AI In Education
- Desktop In K-12 Education Market Report
- K-12 BYOD Market Sizing
- IFPD Lesson Delivery Software Ecosystem Market

| K-12 Market Trackers

- Mobile PC In K12 Market Tracker
- Interactive Displays Market Tracker

| K-12 End User Reports

- Ed Tech Voice – Client Device Computing
- Ed Tech Voice – Audio Visual Devices
- Ed Tech Voice – AI
- Ed Tech Voice – Learning Outcomes
- Ed Tech Voice – Classroom Tools
- Ed Tech Voice – Administrative Tools
- K12 BYOD End User Market Report

| Higher Ed Market Trackers

- Higher Education PC Market Tracker

| Higher Ed End User Reports

- Higher Education End User Report

| Products & Services

- Publication Snapshot
- Service Overview
- Methodologies
- End User Reports
- Custom Research
- Our Expertise

B2B SERVICE OVERVIEW

We provide a wide range of specialist intelligence reports and ongoing personal debriefs to support B2B technology businesses with their decision-making. All services are tailored to the needs of our clients and designed to deliver the best possible results.

PROFESSIONAL DISPLAYS

- | Large Format Displays:
- Front Projectors
- LCD Displays
- LED Displays
- MicroLED Displays
- Interactive Displays
- Collaboration Displays
- | Digital Signage
- | LED Processors
- | Media Servers
- | Video Wall Displays
- | Video Wall Controllers
- | Virtual Production & XR
- | **Pro Display Surveys:**
- Enterprise AV Decision Maker
- Hybrid Work End-User

PROFESSIONAL VIDEO

- | Professional Camcorders:
- DSLR & Mirrorless Cameras
- Digital Cinema Cameras
- PTZ Cameras
- System & Box Cameras
- | SaaS & Cloud
- | Production Switchers
- | Media Servers
- | Virtual Production & XR
- | **Pro Broadcast Surveys:**
- Content Creator

PROFESSIONAL AUDIO

- | Audio Over IP
- | Digital Signal Processors
- | Immersive Audio
- | Power Amplifiers
- | Pro Headphones
- | Pro Loudspeakers
- | Pro Microphones
- | Pro Mixers & Consoles
- | Verticals
- Installed Commercial
- Installed Leisure
- Touring & Rental
- Portable Sound
- | **Pro Audio Surveys:**
- Content Creator

COLLABORATION TECHNOLOGY

- | Video Conferencing
- 360 Degree Cameras
- Conferencing Cameras
- PTZ Cameras
- UC&C Platforms
- Video Bars
- | Audio Conferencing
- Conferencing Phones
- Meeting Microphones
- Office Headsets
- Speaker Phones
- | Wireless Presentation Solutions
- | Wireless Conferencing
- | **Collaboration Surveys:**
- Enterprise AV Decision Maker
- Hybrid Work End-User

CONNECTIVITY & SERVICES

- | AV Control Rooms
- | AV Managed Services
- | AV Over IP
- | Intelligent AV
- | KVM Switchers
- | Matrix Switchers
- | Smart Offices
- | System Integrators Landscape
- | The Future of Work
- | **Connectivity Surveys:**
- Enterprise AV Decision Maker
- Hybrid Work End-User

EDUCATION TECHNOLOGY

- | Personal Computing
- | Desktop Computing
- | BYOD
- | AI in Education
- | Esports
- | Sustainability
- | **Education Surveys:**
- | K-12 Edtech Voice
- AV Devices
- Computing Devices
- Admin Software
- Classroom Tools
- Learning Outcomes
- AI in Education
- | Higher Education
- | Student Journey

VERTICAL MARKETS

- | Broadcast
- | Control Room
- | Corporate
- | Education
- | Esports
- | Government
- | Hospitality
- | House of Worship
- | Retail



DIRECT DATA FEEDS

Up-to-date, structured product data from vendors and distributors, split by geography, key specification, application and more.



IN-HOUSE EXPERTS

Informed regional expertise from trusted specialists. Additional strategic commentary and value-add information available through regular client debriefing sessions.



DEDICATED RESEARCH

In-depth exploration of product portfolios, industry publications and company reports. Supported by trade association insights, adjacent markets and government statistics.



INDUSTRY INTERVIEWS

Qualitative and quantitative interviews to validate our industry data and build a wider understanding of market dynamics.



Market Reports

K-12 Coverage

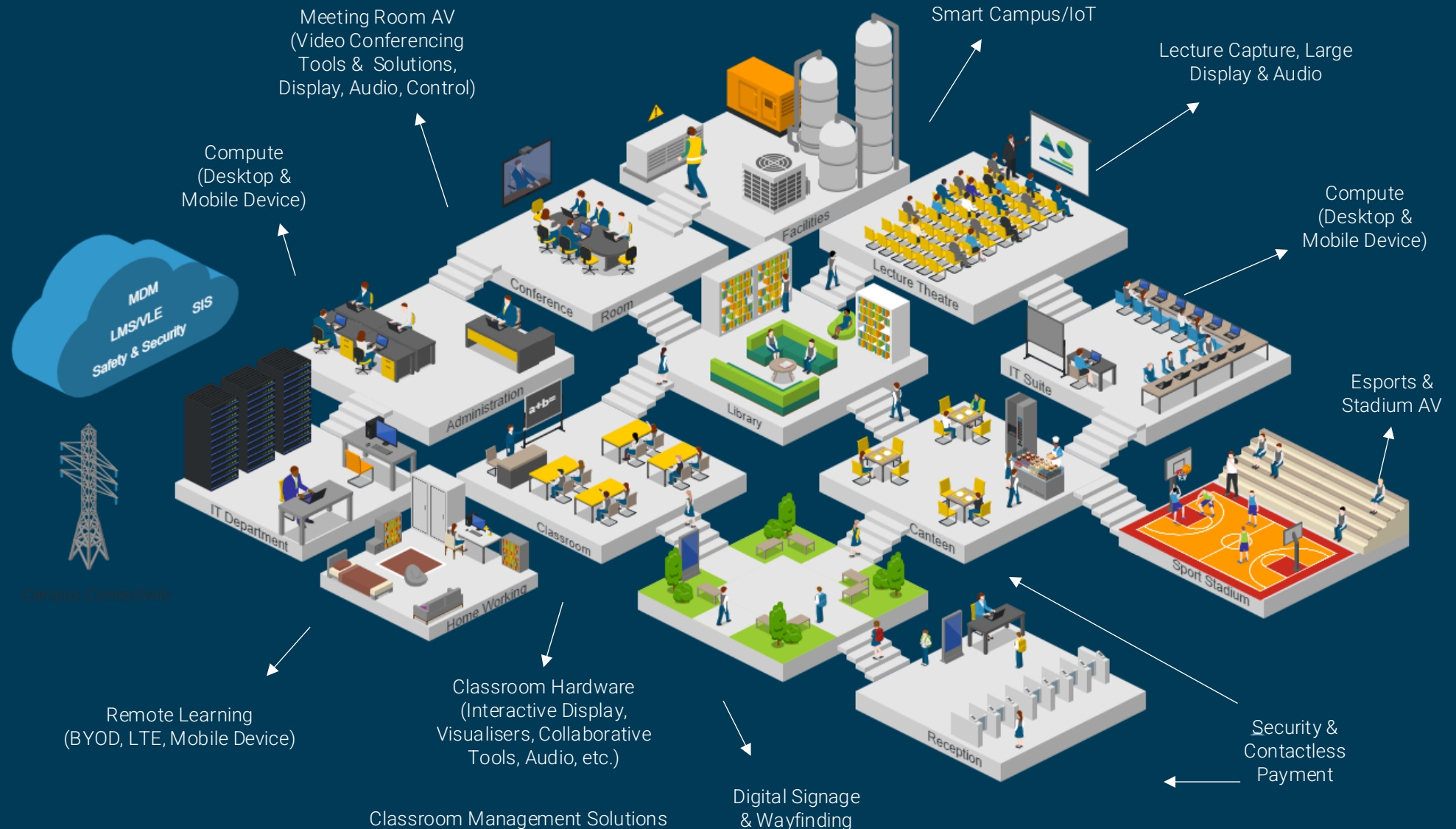


DIGITAL TRANSFORMATION SHAPING 21ST CENTURY LEARNING

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.



Artificial Intelligence technology is clearly one of the most disruptive forces in recent history, but it is also potentially the most transformative one.

Educational institutions are facing the dilemma of using AI-powered tools to reduce repetitive tasks, generate ideas, and provide personalised learning versus potential privacy issues, biases, and other threats.

There are a lot of discussions around teacher and pupil training, but also about incorporating AI literacy into the curriculum.

Futuresource's AI in Education report will review the current state of AI tools adoption and barriers to successful incorporation of these tools on a larger scale.

Key features of the report:

Technology, Tools, and Competitive Review: to identify and interpret key trends that shape the adoption of generative and other AI tools in education. Investigating to what extent this technology is expected to be adopted across the K-12 sector.

Review how AI is being incorporated into existing and new computing devices at schools. Case studies on the main AI platforms.

Analyse Current Rules and Regulations (safety, privacy, etc.) that govern the usage of AI in education.

Methodology: Primary research with PC OEMs, distributors/resellers, AI regulation bodies (DoE etc.), IT decision makers, and curriculum leads in K-12 schools, Futuresource's installed base modeling.

Data Segmentation

- | Geographical Coverage: Global with focus on North America and Western Europe.
- | Areas of Focus: K-12, with case studies on PCs and software platforms that support usage of AI tools in Education
- | K-12 Mobile PC Installed Base Forecast by Key Regions in North America and Western Europe to forecast potential AI usage by 2028.

Key Questions

- | What are the drivers and barriers to the adoption of generative AI tools in K-12 by key regions?
- | Which region is leading in terms of generative AI adoption?
- | How are schools dealing with safety, privacy, and intellectual property issues associated with the use of AI?
- | What are the main rules/regulations for the use of generative AI in schools?
- | What are the key tools and use cases of generative AI in education (case studies on the main PC hardware and software platforms?)

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.

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
- | BYOD market sizing in the K-12 mobile PC market, split by private and public schools

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?

ESPORTS IN EDUCATION

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: global installed base of PCs used for esports in K-12 / Higher Ed
- | Market Forecasting: five-year PC installed base forecast; key drivers and barriers to adoption across key markets
- | Investment & Project Status: key purchasing behaviours in K-12 and Higher Ed; the role of parent fundraising
- | Product, Technology & Competitive Review: key market developments, trends & the adoption of PC gaming accessories
- | Country-level Dynamics: key factors impacting K-12 / Higher-Ed esports adoption across *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?

K-12 DESKTOP 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, esports 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:

- Annual market assessment and five-year forecasts - shipment volumes
- Brand Splits Brand Share –key market developments and trends at an OEM level
- Market splits by country
- 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?

SUSTAINABILITY IN EDUCATION

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.

This report quantifies the global installed base of mobile PCs and desktops in K-12 and Higher Ed institutions to forecast the potential 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.

Reducing E-waste: to identify current challenges and potential solutions to device churns in education like repair, reuse and refurbishment.

Labels and certifications: Energy Star, EPEAT, TCO etc., and how they evolve and transform sustainability features of PC devices.

Sustainable procurement. Identify key purchasing behaviors of sustainable devices in K-12 and Higher Ed. Case studies: New EU, UK and US sustainability policies. 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
- | Global K-12 and Higher Ed PC Installed Base and Shipments (2019-2028) by device type
- | Devices included: K-12 - Notebooks, Chromebooks, Netbooks, Tablets; Higher Ed - Notebooks, Chromebooks, Tablets, Desktops

Key Questions

- | What is the potential for increasing the number of sustainable devices in education?
- | What are demands and expectations from "green" PCs and other IT equipment?
- | What are the current challenges and potential solutions to device churns in education?
- | What are the key certifications/metrics to track the penetration of sustainable devices?
- | What are the drivers and barriers to sustainability agenda in K-12 and Higher Ed by key region

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

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?



Market Trackers

K-12 Coverage



K-12 MOBILE PC 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.

Educational device demand achieved global record high shipments during the COVID pandemic. The market is facing a number of challenges it approaches the middle of the decade. These include the need for a device fleet refresh on a previously unparalleled scale, the end of support for Windows 10, the availability of funding, and the introduction of AI. 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.

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 Band, 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 FlatPanel 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

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?
- | 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



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.
- | The 2024 offering comprises of six US reports based on interviews with 400 IT decision-makers, 400 curriculum leads and 400 teachers in the USA.
- | The Europe 2024 offering comprises of four reports based on interviews with 400 IT decision makers and 400 teachers across the UK, Germany, Italy and the Netherlands.
- | Provides an understanding of key end user trends and developments for any company seeking to expand its knowledge of the EdTech sector.

REPORT COVERAGE

USA

- | 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.
- | **NEW for 2024** – Learning Outcomes and AI-end user research with K-12 teachers to ascertain the efficacy of tech in the classroom.

EUROPE

- | End user research into the investment priorities and unmet wants and needs of K-12 schools in the UK, Germany, Italy and the Netherlands. Focus on IT infrastructure.
- | **NEW for 2024** – Learning Outcomes and AI-end user research with K-12 teachers.

KEY DELIVERABLES

Delivered as a suite of 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 outlines the findings from a large-scale interviewing process with K-12 IT decision makers.

Representative end user panel of 400 in-depth interviews with District IT Purchasers in the USA and 400 across Europe.

This report focuses on the current and projected ownership of notebooks, Chromebooks, tablets and desktop PCs, 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.

Exploration of the funding received by schools from ECF/ESSER (US) and EU funding schemes.

Data Segmentation

- | USA Report coverage: Geographic Region (East/Central/West), District Size (Small, Medium & Large Districts)
- | Europe report: UK, Germany, Italy and the Netherlands.
- | Information Provided: Awareness of market price points, brand of hardware owned, OS choice, factors impacting device and brand choice, computer use cases (i.e. shared/1:1), % of devices taken home, average age of device and replacement plans, existing spend.

Key Questions

- | How is IT budget split by product category and school size?
- | What does future investment look like for computing devices?
- | How are operating systems split across mobile and desktop?
- | What remains the most popular choice of device in use cases among teachers and students?
- | What pricing changes can we expect for devices over the next two years?
- | With uncertainty over funding, are schools looking to extend the life of their devices?

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, Projectors and Displays. 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 and in Europe; representing all 50 states, grouped by East Coast, West Coast and Central states in the USA, and the UK, Germany, Italy, and the Netherlands in Europe.

Feedback on the current usage of EdTech in schools and planned investment in overall classroom AV, Displays and Projectors 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

IT investment priorities are also explored, as well as key methods of procurement

Data Segmentation

- | Geographical coverage:
 - US Report; (East/Central/West), District Size (Small, Medium & Large Districts)
 - Europe Report: UK, Germany, Italy, Netherlands
- | Information Provided: Number of classrooms / large meeting spaces, brand of hardware owned, factors impacting device purchasing choices, classroom penetration by device, wireless casting usage, replacement cycles of AV devices, IT budget structure, existing spend & future planned usage model.

Key Questions

- | What is the current and projected ownership of AV devices?
- | What is the main reason for the shift in type of AV devices owned?
- | Which features are most important when purchasing?
- | How often do you replace your AV equipment?
- | What are your top 3 overall IT investment priorities?

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.

The main areas within this report include feedback on the current usage of classroom tools in schools, adopted vendors and satisfaction of performance of these vendors.

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, Assessment tools, STEM software, AI and Gamification, as well as the key priorities and obstacles faced.

Key features of the report:

Feedback on the current usage of EdTech classroom tools in schools and planned investment in the future, as well as use cases.

Insights into which factors are most important to schools when investing in classroom tools

Satisfaction with current classroom tools and vendor is also explored, as well as key methods of procurement

Current spending and budget allocation

Planned future purchases in student software

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?
- | What type of client device used by students in the classroom do you tend to run your assessment tools on?
- | What is your current and planned usage of AI in the core curriculum?
- | Which criteria is rated most important when making purchasing decisions?
- | What student-facing software applications are you considering purchasing in the next 12-months?

ED TECH VOICE – ADMINISTRATION TOOLS

This report will focus on the current and projected ownership of key technologies: SIS (Student Information Systems), MDM (Device Management Solutions) and SSO/Safeguarding (Single Sign-On Solutions) 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 challenges still remain.

This report explores the position of education administration tools within K-12 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), Device management solutions (MDM) communication tools and SSO/Safeguarding 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, as well as use cases

Insights into which factors are most important to schools when investing in administration tools

Satisfaction with current administrative tools and vendor is also explored, as well as key methods of procurement

Current spending and budget allocation

Planned future purchases in administrative software

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?
- | How satisfied are you with your current administrative tools?
- | Which criteria is rated most important when making purchasing decisions for administrative tools?
- | What student-facing software applications are you considering purchasing in the next 12 months

ED TECH VOICE – LEARNING OUTCOMES

Recent studies have raised doubts on the efficacy of technology on improving learning outcomes in K-12. This report seeks to provide clarity on this issue and will quiz teachers on their experiences of, and attitudes towards the impact of tech in the classroom. It will also explore the barriers to tech being utilized to its potential – from training to effective integration into the pedagogy.

The teachers surveyed for this report will be profiled across numerous metrics, including: teaching experience; depth of training on tech integration; experience of software solution types; rate of student mobile device adoption etc. This data will be used to draw correlations between teacher-types and the impact of tech on learning outcomes.

Key features of the report:

Insights into the amount of training teachers have received on utilizing software solutions and integrating tech into the pedagogy

How learning outcomes are measured

Analysis of the most influential factors on learning outcomes

Attitudes on the impact of technology on learning outcomes

Feedback on the most effective software solutions on improving learning outcomes

How learning outcome performance has developed since Covid-19.

Data Segmentation

- | Geographical Coverage: US Report: (East/Central/West), Europe Report: UK, Germany, Italy and the Netherlands
- | Representative end user panel of approx. 400 in-depth interviews with teachers.

Key Questions

- | Approximately how many hours of training have you received in the last 2 years on how to use Administrative/ Classroom tools?
- | How do you measure learning outcomes?
- | Please rank the following factors on the influence they have on learning outcomes (where 1 is the most influential)
- | To what extent do you believe the integration of technology in the classroom improves students' learning outcomes?
- | In what way does the integration of tech in the classroom improve your students' learning outcomes?

The transformative potential of AI in K-12 education is a key topic of discussion across the industry. This report will survey teachers on if/how they are currently using AI and their expectations for how it will be utilized to not only drive efficiencies but also improve teaching standards.

This report will also explore how teachers are managing and guiding students on how they can utilize AI tools in their studies.

Whilst there is lot of excitement over the potential for AI in education, there are also concerns around the implications of its usage. This report will capture the leading reservations held by teachers on the utilisation of AI in the classroom.

Key features of the report:

Feedback on the current usage of AI tools among teachers and how this is expected to change

How much time AI is currently saving teachers

Leading concerns/reservations teachers have about using AI in the classroom

The confidence levels of teachers on using AI tools/how much training has been provided on AI

How teachers manage students' use of AI tools in their learning

Data Segmentation

- | Geographical Coverage: US Report: (East/Central/West), Europe Report: UK, Germany, Italy and the Netherlands
- | Representative end user panel of approx. 400 in-depth interviews with teachers.

Key Questions

- | Do you currently utilise any software solutions that utilise AI for work purposes?
- | What concerns or reservations do you have about using AI in the classroom?
- | What do you use these AI-enabled tools to achieve?
- | For each of the use cases selected, how many minutes/hours do AI-enabled tools save you each week?
- | Why aren't you currently using AI tools?
- | How do you manage your students' use of generative AI tools in their learning ?
- | Have you received any training on how to incorporate AI into your teaching practices?

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

Data Segmentation

- I Geographical coverage: UK, USA, Germany, India, Australia, Japan
- I 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
- I Key information: Preferable brands, desirable features, sought after changes, recommendations.

Key Questions

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



Market Trackers

Higher Ed Coverage



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 600 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 Education Coverage



HIGHER EDUCATION END USER SURVEY

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 North America 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, Generative AI, Esports, Cloud Services, Smart Campus
- | AV Technologies: Classroom Displays, Collaborative Devices, Lecture Capture Equipment, Audio and Video over IP
- | Total Addressable Market
- | Purchase and Channel
- | Budget and Spend

Key Questions

- | What is the TAM in North America and Western Europe?
- | What is the installed base of devices used?
- | What are your T outsourcing and Managed Devices requirements?
- | What is the replacement cycle for devices used?
- | What are the key investment priorities for HED institutions?
- | Who influences HiEd purchases?
- | What is the spend breakdown between IT and AV?
- | What are your esports investment plans?

STUDENT JOURNEY

This report will focus on the devices adopted by students while studying in University and how this differs from their primary device in high school. Many students from K-12 through to University will experience changes in the devices used as part of their learning experience, with varying motivations behind the adoption of device type and brand choice.

This report will provide insights into overall device ownership of students both in K-12 and Higher Education, purchasing motivations and brand choice, use case of primary devices, influence on overall learning outcomes. Feedback will also focus on ideal budgets when purchasing devices, the participation of additional digital tools such as generative AI, Esports and external software, and overall, how the device journey will influence students, post-graduation and in the workplace.

The feedback gathered provides an in-depth understanding of the tech journey students take throughout their studies into their future work.

Key features of the report:

This Student Journey report is based on interviews with 1000 students in the UK and 2000 students in the USA, including both current University students and prospective University students in their final years of K-12.

Feedback on devices used by students, the motivations and criteria behind these purchases, and how they were funded.

Insights into the primary use cases of these devices both at home and on campus.

Understanding how students feel their tech journey will impact their expectations postgraduation and in the workplace.

Data Segmentation

- I Geographical coverage: USA, UK
- I Information Provided: Demographic of students, course studied, source of funding for studies, number and brand of devices currently owned, motivations when purchasing primary device for university, intended budget for primary budget, use cases of primary devices, generative AI and Esports participation, external software purchases, devices expected to use post-graduation, influence of devices on learning outcomes

Key Questions

- I Which of the following devices you own is your primary computing device used for your university studies?
- I Do you intend to purchase a new computing device specifically to use at university?
- I Thinking about your primary device, please indicate how important the following factors were in influencing your choice of device and brand.
- I What do you use this primary computing device for?
- I To what extent do you agree with the following statement; "The use of technology during my university studies will improve my grades and my academic performance".

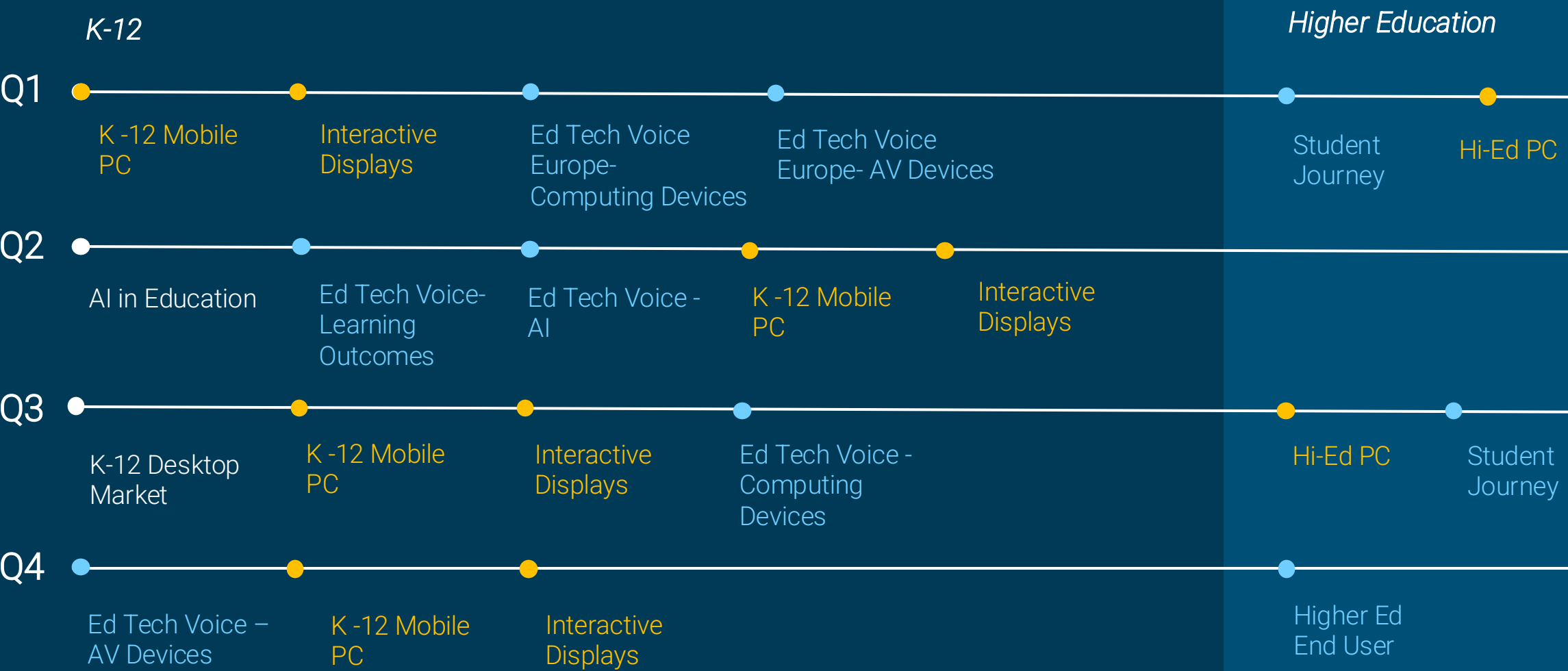


Product & Services

futuresource
CONSULTING



ED TECH | PUBLICATION SNAPSHOT



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.

A close-up shot of a black and silver speaker on a wooden surface.

Audio

A man in a suit presenting to a group in a modern office with large windows.

Collaboration

A close-up of a person's wrist wearing a black smartwatch.

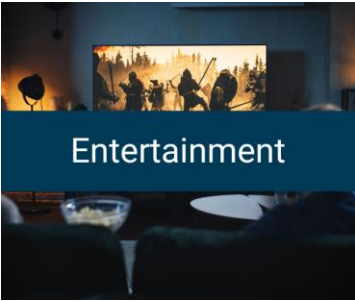
Consumer Electronics

A close-up of a colorful, textured microchip or circuit board.

Displays

A woman on a video call screen with a laptop and books in the foreground.

Education

A movie theater with a large screen showing a scene from a film.

Entertainment

A person operating a professional video camera in a dimly lit room.

Media Technology

A close-up of a circuit board with various electronic components.

Storage Media

[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

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.

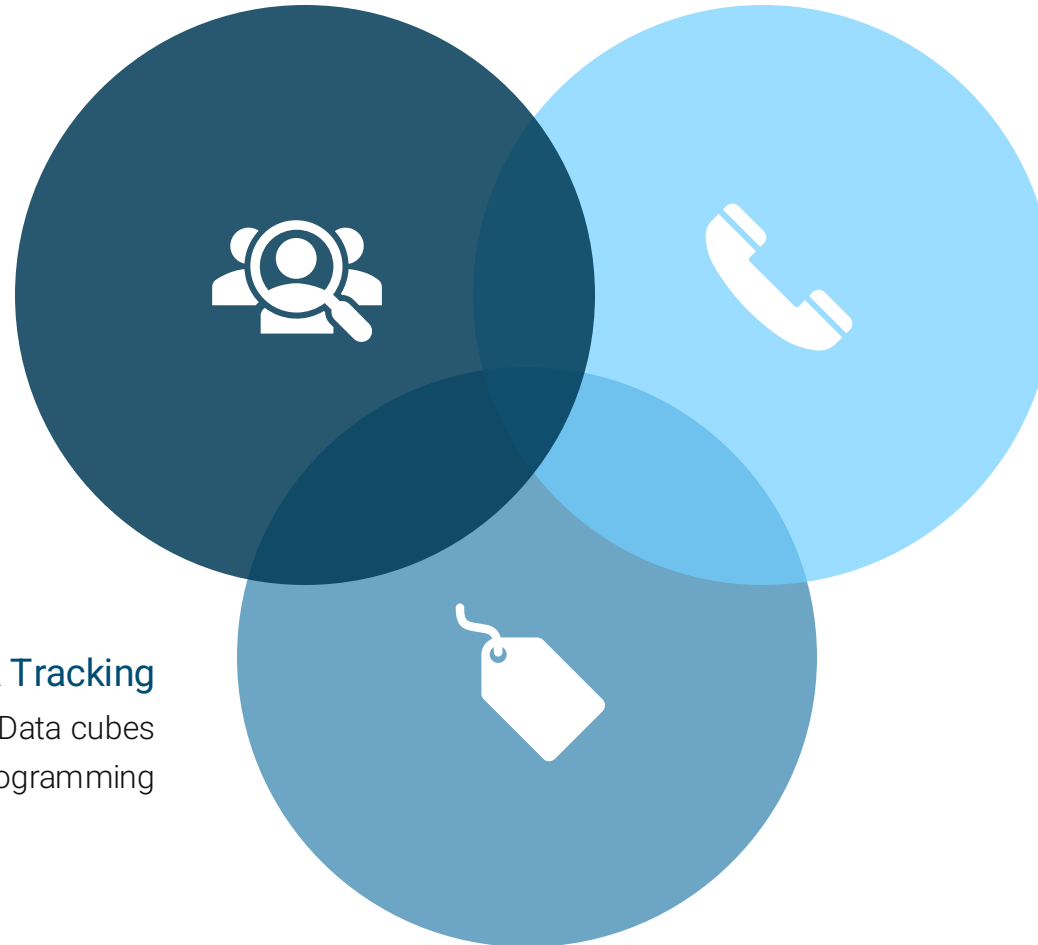
Consumer Research

Quant / qual data:

- Online surveys
- Telephone surveys
- Focus groups
- Diary Studies

Price / Stock Tracking

- Data cubes
- Data programming



Industry Research

Primary & secondary research:

- Expert interviews
- Direct data feeds from vendors
- Trade associations
- Government statistics

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 USP'S 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.



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](#)

An Introduction to our AV Database:

Our consolidated AV database is the go-to resource for extensive metrics across the audio visual space, covering displays, audio, capture & production, collaboration, infrastructure & more.

Key benefits:

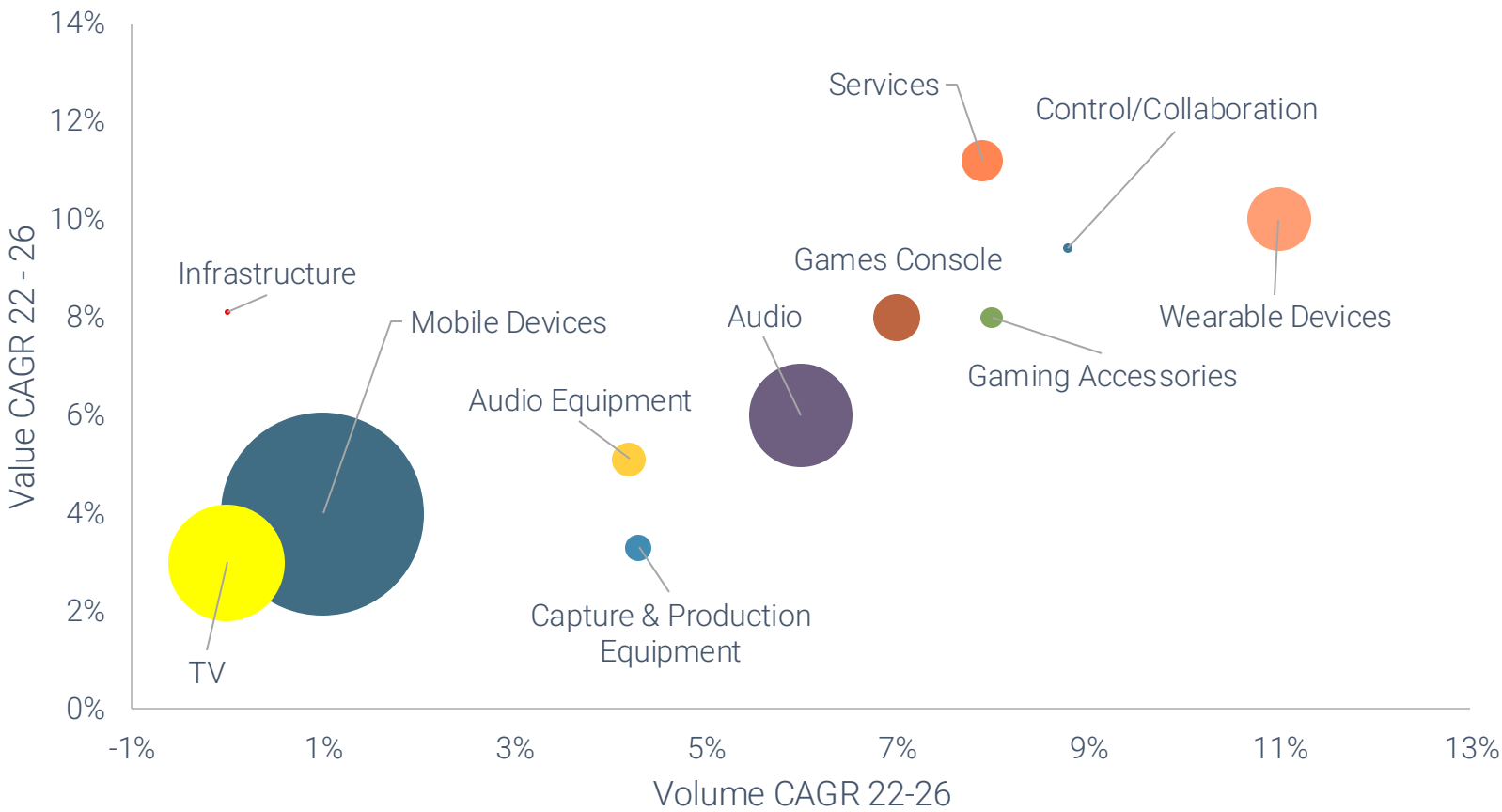
Gain a holistic understanding of the market size, growth rates, and global brand share across multiple product segments to identify opportunities and align strategies effectively.

Conveniently access market data in Futuresource's user-friendly Online Analyzer platform, saving time and reducing costs for efficient analysis.

Leverage your market understanding, growth potential, and competitive advantage to attract investors and stakeholders and drive business expansion.

[Find out more](#)

Global AV Industry – 2022 Category Value (\$) and Growth Expectations



ABOUT FUTURESOURCE EMPOWERING BRANDS FOR OVER 35 YEARS

For over 35 years, global technology and media powerhouses have trusted Futuresource to deliver unrivalled data, consumer insights, and industry expertise, creating perspectives that drive business acceleration.

STRENGTHENING POSITION, PROFIT, PROPOSITION AND REPUTATION

We provide the data, analysis, end-user insights, and narrative that inform actionable insights, enabling our clients to lead the charge on market share, diversification, innovation, and customer experience.

INDUSTRIES

- | | |
|----------------------|------------------|
| Audio | Education |
| Collaboration | Entertainment |
| Consumer Electronics | Media Technology |
| Displays | Storage Media |

TALK TO US

Interested in learning more about how Futuresource can help your business, how you can work for us or collaborate? Get in touch!

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