

## QUARTER 1 2017 WORLD INTERACTIVE DISPLAYS

Quarterly Market Track Service

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# INTRODUCTION

- | The Interactive Whiteboard market has grown at a tremendous pace over the last decade. Initially major uptake was in the UK, Mexico, and USA, now Interactive Whiteboards are common globally. The technology has evolved over the last few years and we now see Interactive Flat Panels gaining traction in the market, at first into a few leading countries, Netherlands, Korea and the UK especially. This has encouraged additional vendors into the market.
- | These products are almost exclusively used in K-12 schools but the corporate meeting room market is also beginning to adopt interactive display solutions, the addressable market of meeting rooms is larger than K-12 classrooms and existing penetration is negligible.
  - As some of the early displays are 10 years old the replacement market in K-12 is also growing.
- | The education sector provides a vast target market for vendors and component suppliers alike, with over 43 million classrooms and 1.5 billion enrolled students and teachers in K-12 across the world.
- | The Interactive Displays Quarterly Market Track is a comprehensive service, based on actual sales-in data from vendors. The service covers both Interactive Whiteboards and Interactive Flat Panels in education and corporate sectors. This report covers:
  - Sales data at sell-in level, by country
  - Forecasting, five year sales forecasts by country
  - Product, Technology, & Competitive Review - To identify and interpret key market developments and trends.
  - Detailed information is available in the Analyzer
- | For further details, or if you have any questions, please email [colin.messenger@futuresource-hq.com](mailto:colin.messenger@futuresource-hq.com)

# RELATED REPORTS

- | Further reports issued by Futuresource Consulting which relate to the Ed Tech market include:
  - Mobile Computing in K-12 Quarter Market Track
  - Digital Platforms and Tools in the K-12 Sector - UK and US market review
  - Immersive Technologies in Education
  - Projector Worldwide Quarter Market Track
  - Flat Panel Worldwide Quarter Market Track
  - Visualiser Half-year Market Track
- | For more information, contact the author of this report or visit <https://reports.futuresource-consulting.com>

	Executive Summary	6
	Brand Analysis	15
	Regional Update	26
	Technology Update	43
	Specification and Pricing	55
	Corporate Sector	63
	Classroom penetrations	75
	Appendices	80
	• Forecast Comparisons	81
	• Historical Adjustments	82
	• BETT and ISE Show Reports	83
	• About Futuresource	84

# REPORT COVERAGE AND DEFINITIONS

## Report Coverage

- | This report covers the use of interactive displays within education (i.e. classroom) and corporate (i.e. meeting room) environments. Market data/analysis does not cover additional applications of interactive displays such as digital signage.

## Terminology

- | **Interactive Display** - For the purpose of this report, interactive display refers to a combination of interactive whiteboard and interactive flat panel. All charts refer to total volumes of interactive whiteboards and interactive flat panels unless specifically stated otherwise
- | **The Three Technologies** - Refers to combined analysis of interactive whiteboards, interactive flat panels and interactive projectors.
- | **Interactive Whiteboard (IWB)** - The interactive whiteboard sensing technology allowing users to interact with the image being projected. Only 'solid' board solutions are included, not 'attachment' devices such as Mimio.
- | **Interactive Flat Panel Display (IFPD)** - A flat panel display (LCD, LED or Plasma) which has interactive technology built into the display. Overlay technology is not included in this report.
- | **Interactive Projector (IP)** - A projector which allows the user to interact with the projected image using a stylus or finger touch.
- | **Average Street Price (ASP)** - End User (school / company) price excluding VAT
- | **Market Value** - Refers to volumes multiplied by Average Street Price
- | **Mobile PC** - Personal Computing devices such as Notebooks, Chromebooks, Netbooks and Tablets, used for educational purposes by students and teachers and purchased by schools (often in 'one to one' learning programs), not including bring your own devices 'BYO'.
- | **Teaching Spaces** - Refers to the addressable number of rooms/locations that interactive displays could be utilised in, i.e. classrooms, libraries, communal areas. Futuresource calculates the number of teaching spaces based upon a calculation of total number of students divided by the average number of students per classroom. An additional % is then added for further communal areas (i.e. libraries).
- | **Classroom Penetration** - The percentage of teaching spaces with an interactive device.



Interactive Whiteboard  
'IWB'

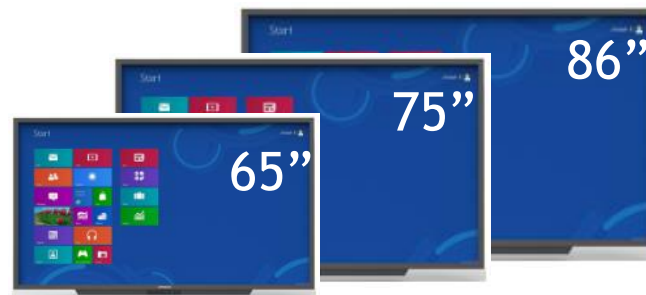


Interactive Flat Panel  
'IFPD'

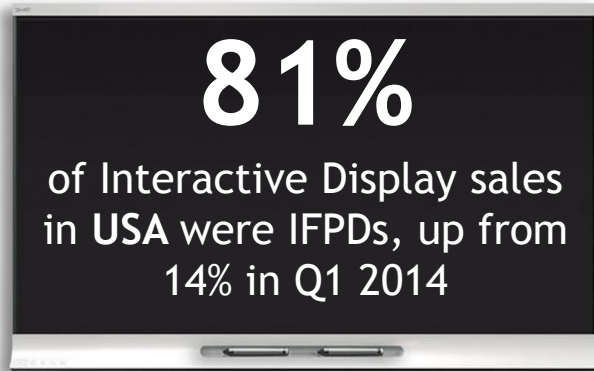
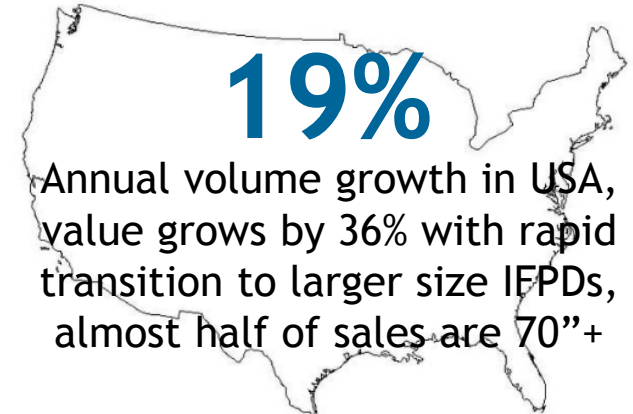


Interactive Projector  
'IP'

## EXECUTIVE SUMMARY



**13%**  
of IFPDs are over 80"  
two years ago it was 3%



Replacement demand is very  
strong in both USA and UK





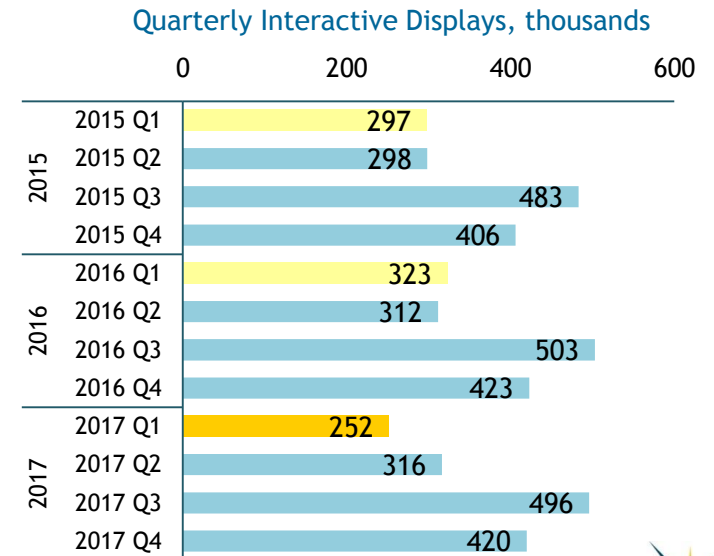
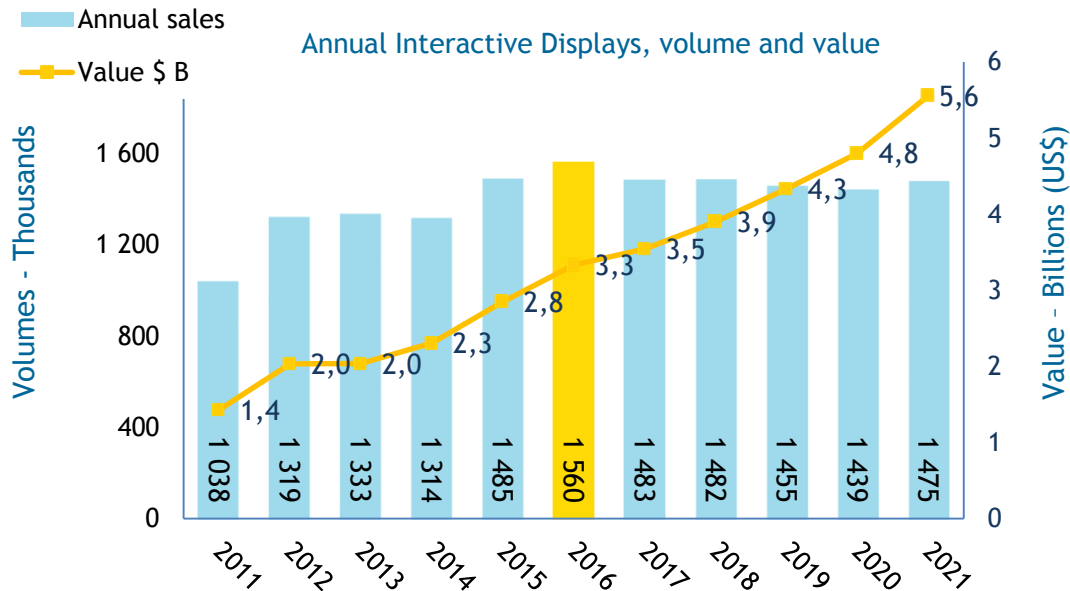
## Slow China Volumes Hold Back Start of Year, Growth Forecast in Other Countries

The Global Interactive Display sales in 2017 Quarter 1 were 251k, -22% growth 'YoY'. This was primarily due to the ending of Fatih, 2016 Q1 was the final quarter, and a slow start to the year in China. Excluding volumes in Fatih and China the market would have been static.

- China, was below forecast in Q1 at 153k, 'YoY' decrease of 16%, due to lack of large tenders, the remainder of the year is forecast to pick up.
- USA had another strong quarter at 20.0k displays a 'YoY' increase of 19%.
- UK was the largest EMEA country at 13.7k, 17% 'YoY' decrease, Italy, was again, the second country with 6.5k, Netherlands: 5.6k; and Germany 4.9k.

2017 is forecast to be 1.5 million displays, a value of \$3.5 bn, volume decrease by 5% and value increase by 6%.

Value will increase strongly with a 11% 'CAGR' (2016 to 2021) driven by the build up of sales into corporate meeting rooms. These sales will comprise of the more expensive Interactive Flat Panel products sold at a premium.



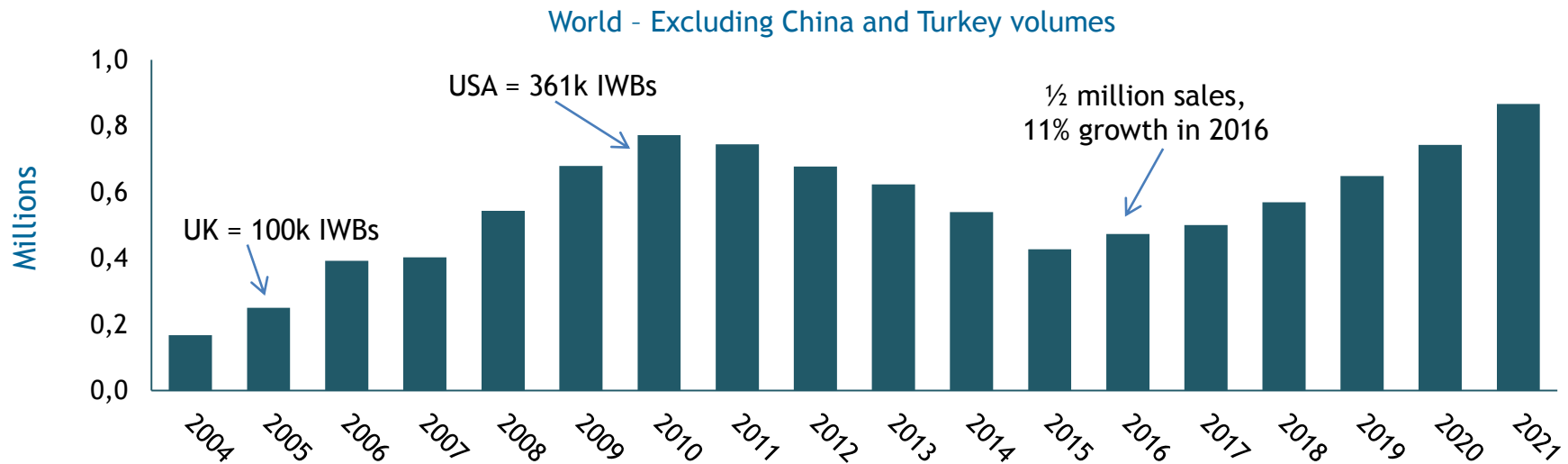


# LONG TERM WORLD WITHOUT CHINA AND TURKEY

## Excluding China and Fatih Volumes Growth was 11% in 2016, with ½ Million Sales

- | The growth of China and the Fatih tenders in Turkey have contributed enormously to the total market in the last 5 years. They significantly sway the overall figures and can mask activities in the many other countries. For this slide we are considering life without those two major influencers, analysing only the 500k sales in 2016 from the other countries.
- | There was an 11% growth in 2016 with resurgence of major countries such as the USA (24%, annual growth), UK (24%), Australia (190%), Italy (53%) and Netherlands (33%).

- | This growth is forecast to continue due to three factors:
  - Replacement markets - many of the early IWBs are over 10 years old.
  - Change of technology - from IWB to IFPD gives schools a reason to change.
  - Corporate market - the emergence of the corporate market buoyed on by Microsoft Surface Hub, Google Jamboard and Cisco Spark Board (launched at ISE). Unlike other providers to the Corporate market, these vendors bring significant back end infrastructure that compliments the interactive display offering.



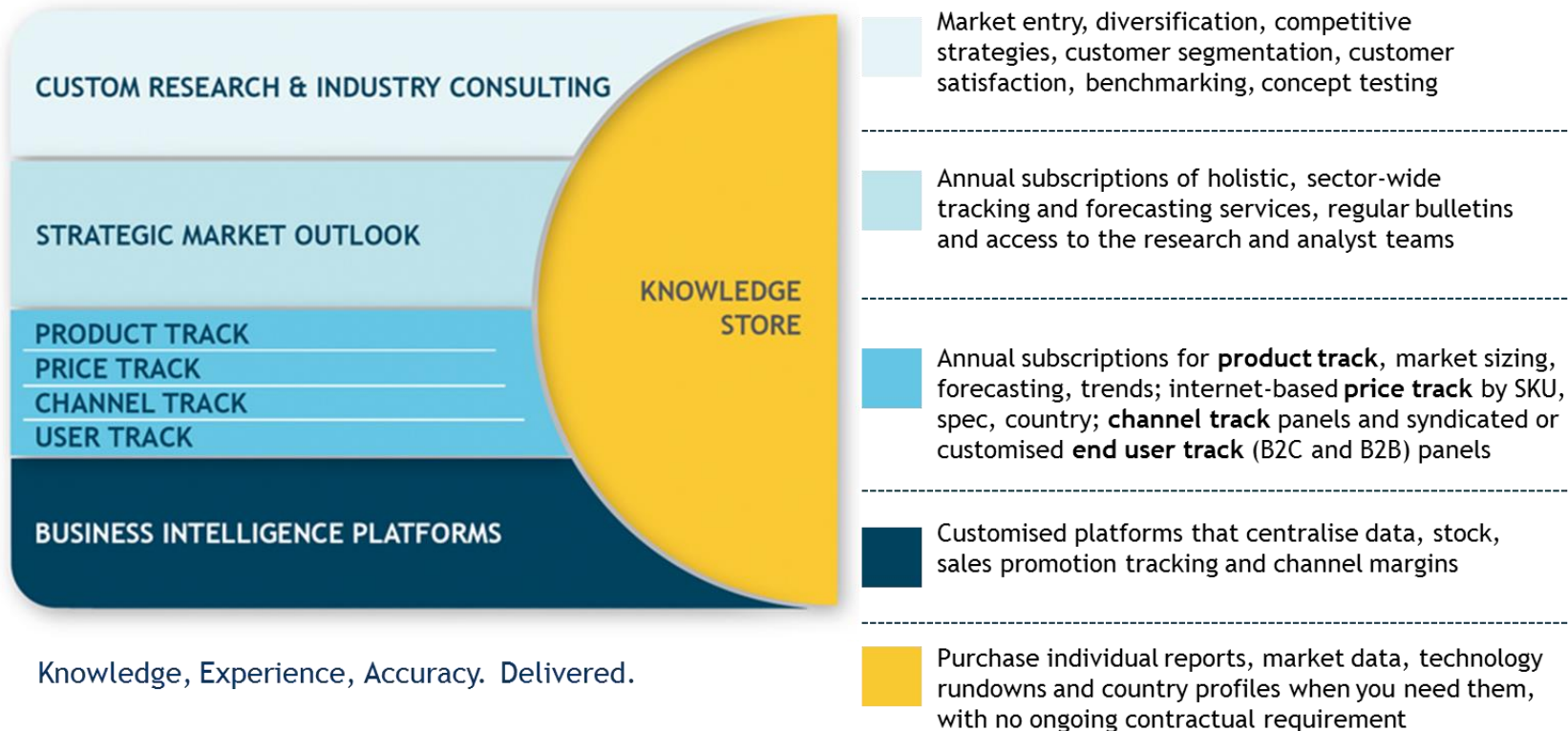
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Futuresource analysts combine their expertise and forecasting skills with data drawn from a wide range of primary research, including interviews with content owners, service providers, retailers, hardware vendors, technology companies, official bodies and industry associations.

Background information and supporting data is obtained from a range of secondary research sources, including trade publications, company financial reports and conference proceedings, in order to allow data to be further cross-checked and placed within the wider industry context.



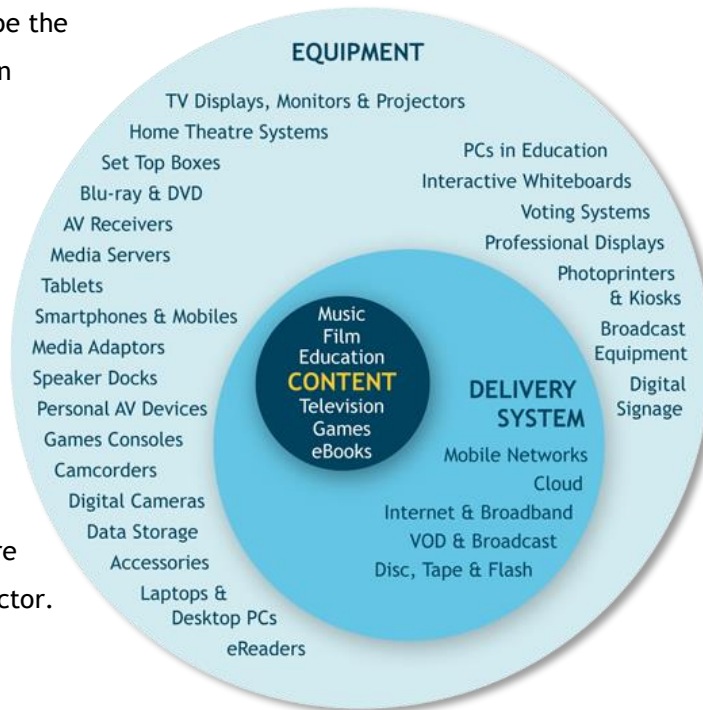
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- | All leading and emerging product categories across displays, home audio-visual, imaging, mobile communications and computing. 30 developed and emerging countries and regions worldwide.

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- | Quantification and independent assessment on the trends and developments across video, music and games content, from packaged media to broadcast to online services.

### Education Technology

- | Analysis of education technology market trends, technologies and products, vendors, applications and government investments on a global basis.

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### Recording Media

- | Storage media tracking for external hard drives, flash memory cards/USB and solid state disk across 32 countries.

### About Futuresource Consulting

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
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- | Entertainment Content & Distribution
- | Education Technology
- | Optical Disc Manufacturing
- | Broadcast Equipment
- | Professional Displays



# talk to us...

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