



RESEARCH SURVEY

Audio Visual and Unified Communication Technologies in Higher Education

PREPARED FOR AVI-SPL
DECEMBER 2017

Project Background

Purpose

The Center for Digital Education (CDE) was commissioned by AVI-SPL to field a quantitative survey to higher education officials.

Key questions focused on technology procurement trends as well as audio visual (AV) and unified communications (UC) technologies in use or needed within higher education.

The purpose of this project was to obtain a five year outlook of audio visual and unified communication technologies needs in higher education.

Methodology

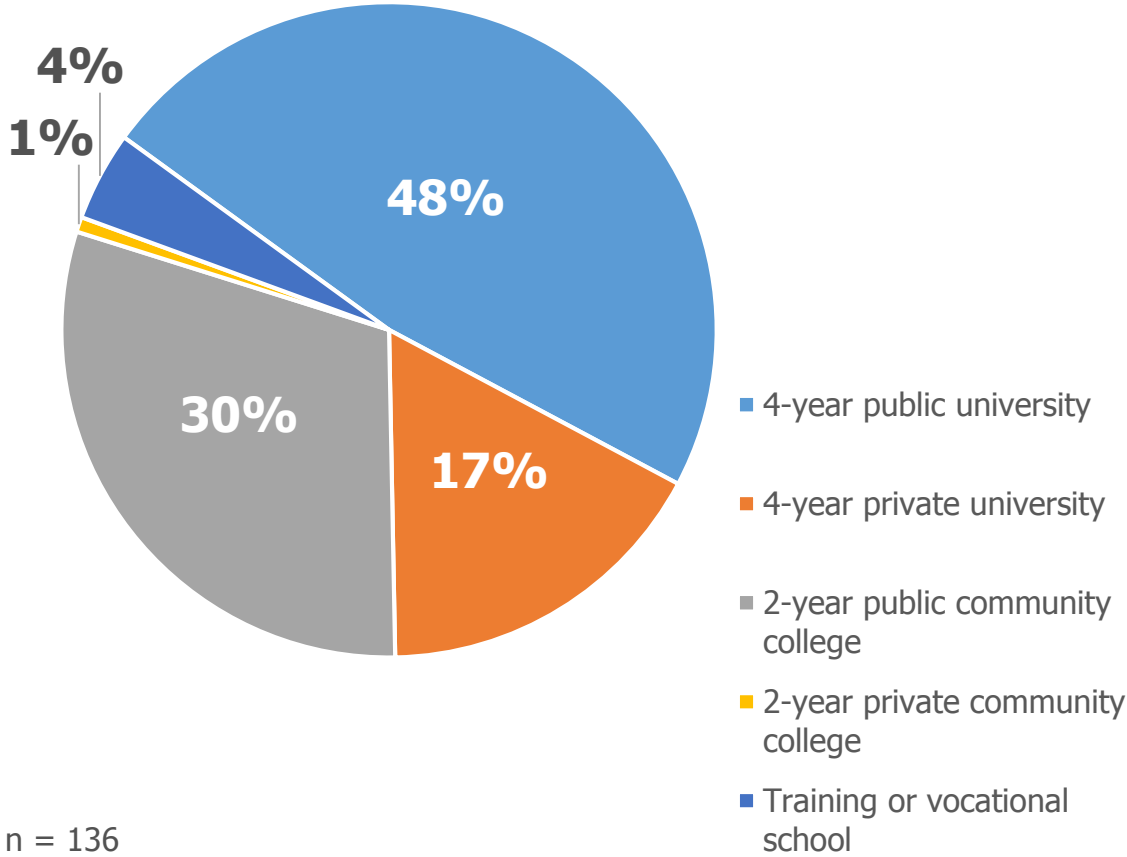
The Center for Digital Education conducted a quantitative survey to higher education officials.

Our survey audience was given filter questions to ensure that AVI-SPL received responses from participants who are decision makers or influencers within information technology and facility procurement.

The survey, developed from the input of the AVI-SPL team, was fielded in November 2017. 19 questions were presented to the higher education audience, with the goal of 125 responses. At the close of the survey, CDE had received 136 responses.

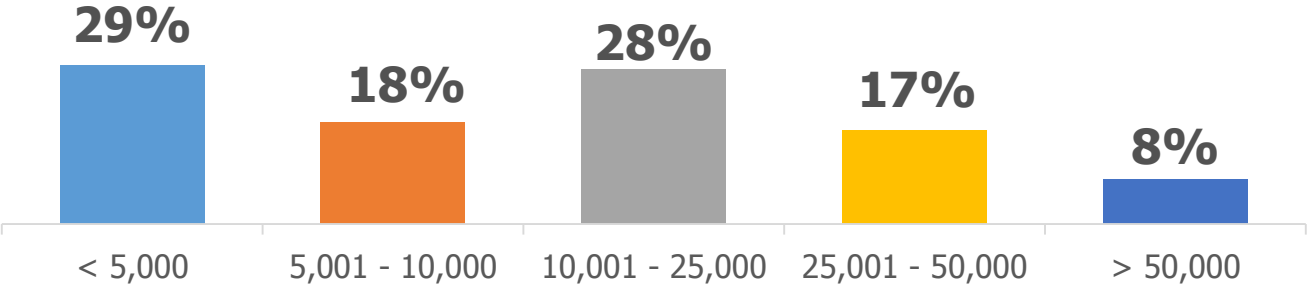
Respondent Demographics

Institutions of Higher Education

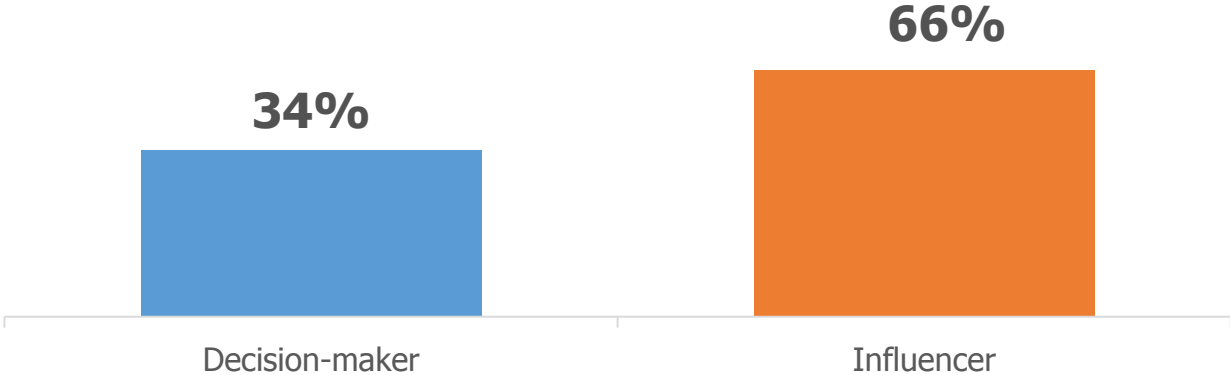


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Fall Enrollment



Role In Facilities/IT Procurements



How are AV and UC purchased?

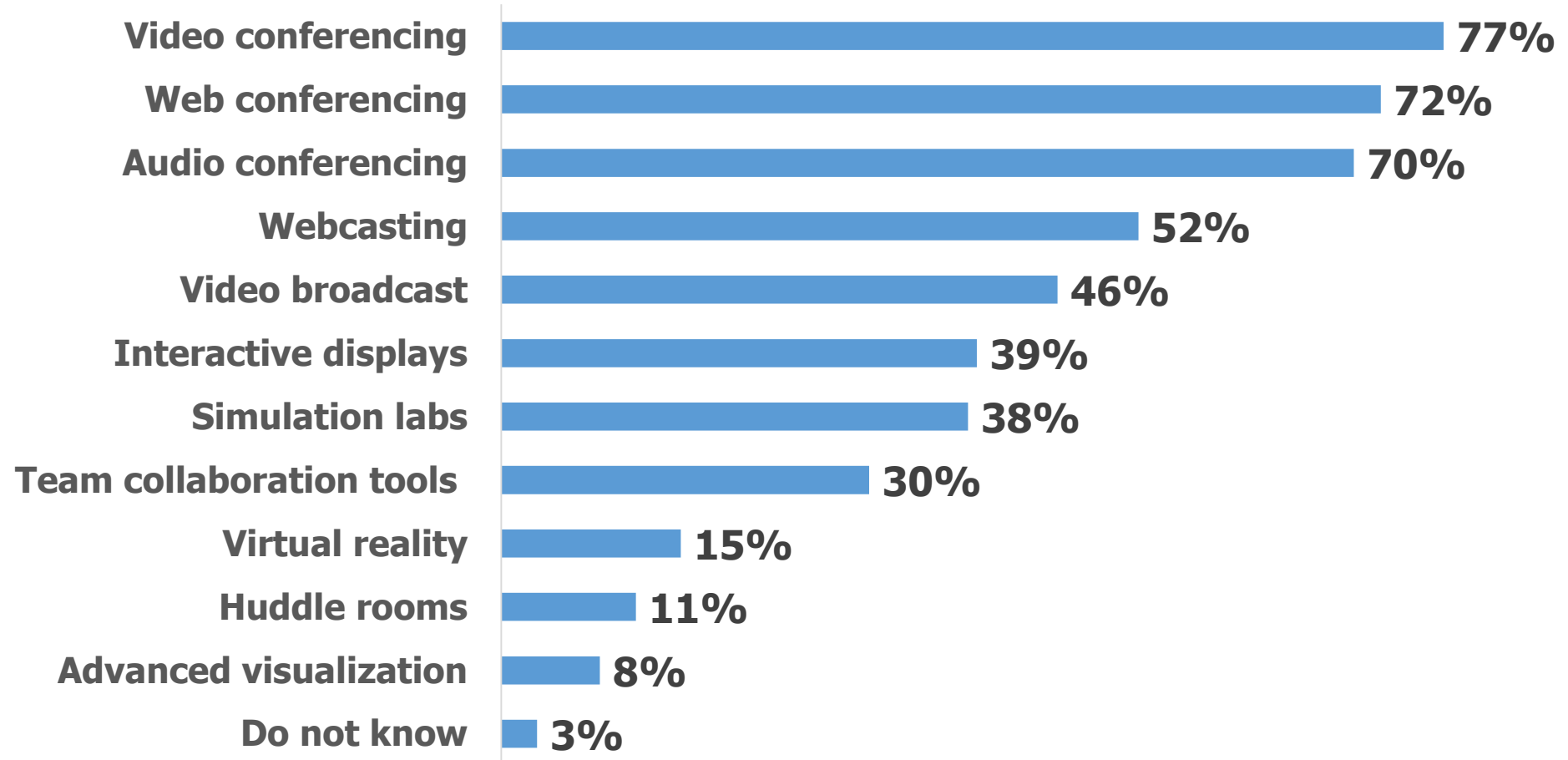
Current v. Five Year Forecast

Key Findings

- ✓ There appears to be a **movement toward** operating budgets for IT
- ✓ **AV technologies**, rather than UC technologies, are the most likely to be procured over the next five years
- ✓ Research communities are mostly likely to be demanding **collaboration technologies** over the next five years

Technologies Currently In Use

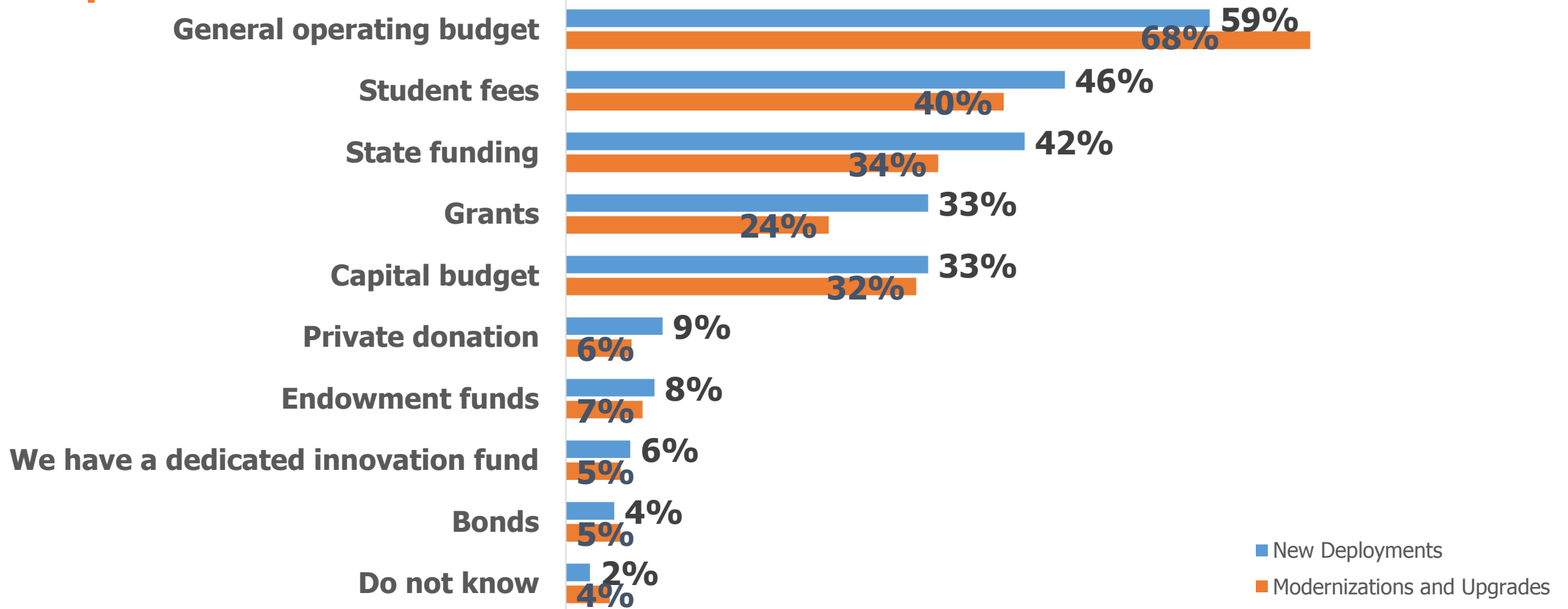
Video and web conferencing are the AV/UC technologies most in use in higher education.



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Funding Sources For Technology

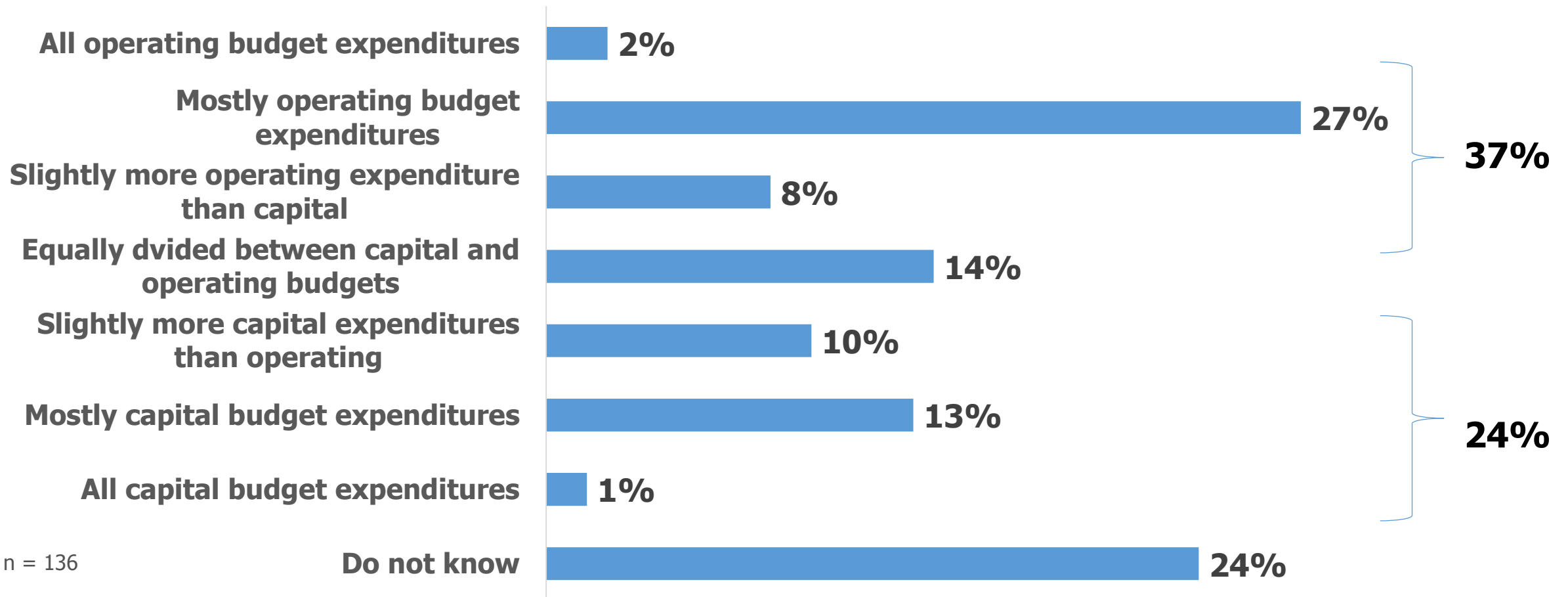
Institutions utilize their general operating budget for both new purchases and modernization



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Future Technology Funding

Respondents indicated that in five years technology procurement is slightly more likely to come from an operating budget



Five-Year Procurement Forecast

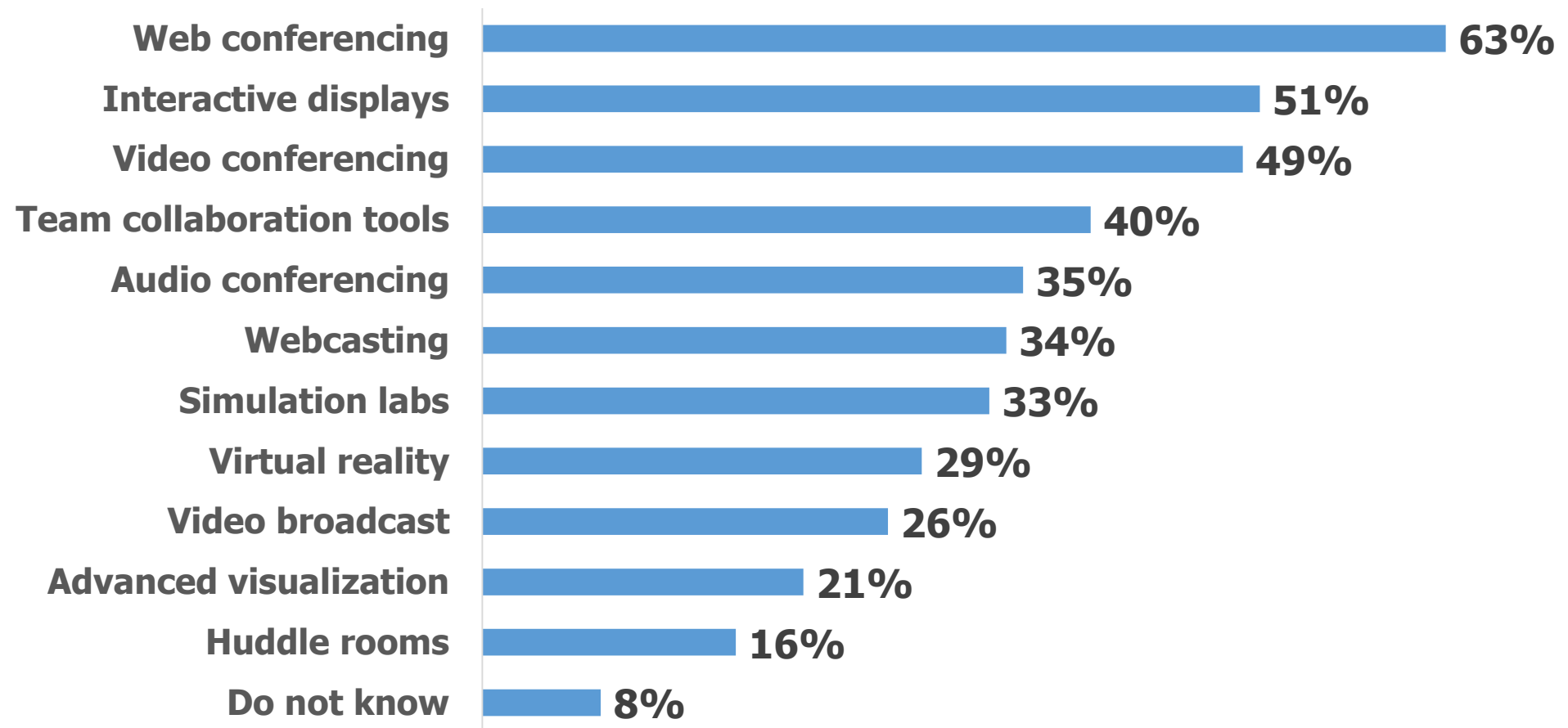
	1 – 2 years	3 – 5 years	No Plans	Do Not Know
Installing new AV equipment	42%	23%	20%	15%
Upgrading existing AV equipment	44%	33%	8%	15%
Installing new UC equipment	36%	24%	18%	22%
Upgrading existing UC equipment	38%	25%	15%	22%
Investing in other types of collaborative and visual technologies	36%	15%	17%	32%

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Q6: At your institution, what is the procurement forecast for AV/UC technologies? Select all that apply.

Short-Term Procurement: AV/UC Tech

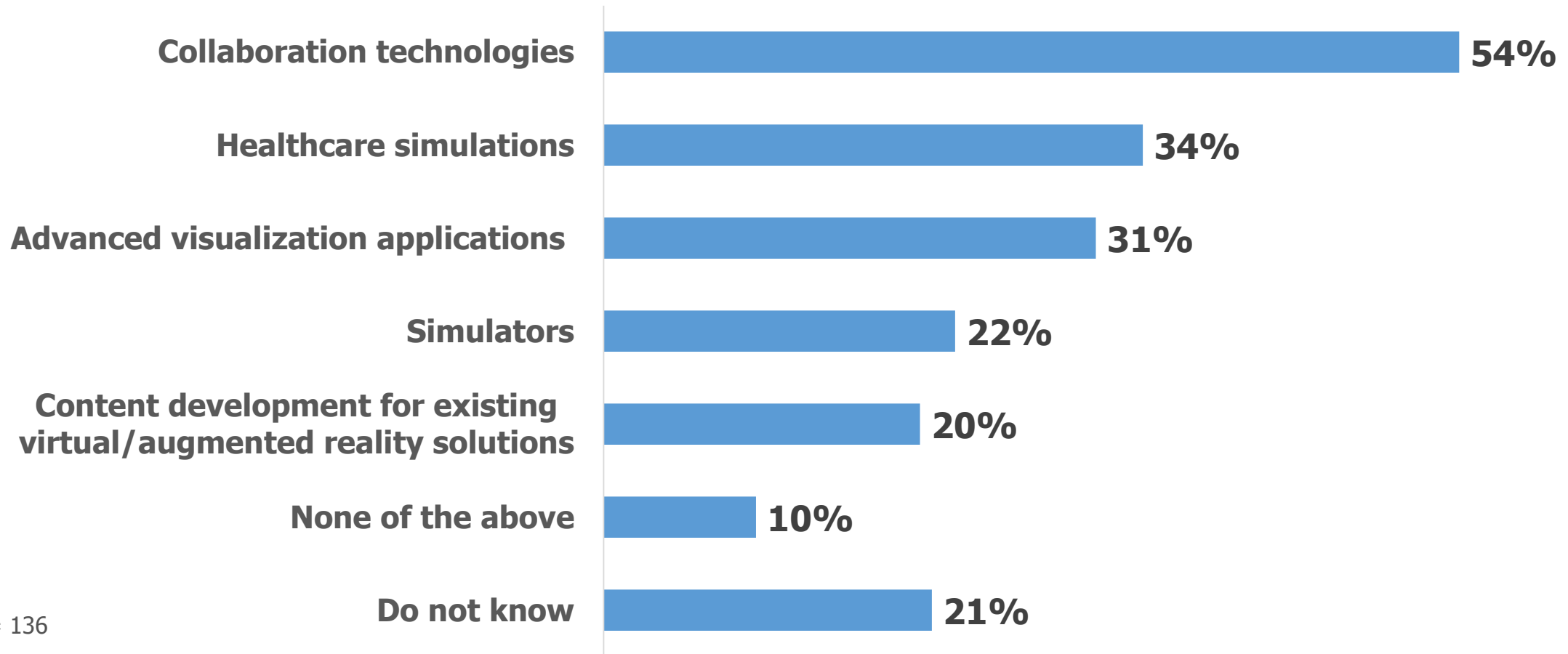
Web conferencing and interactive displays are a focus for procurement within the next 1 – 2 years.



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Five Year Forecast: Research Community

Collaboration technologies are a focus for procurement within the institution's research community.



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Technology Preferences

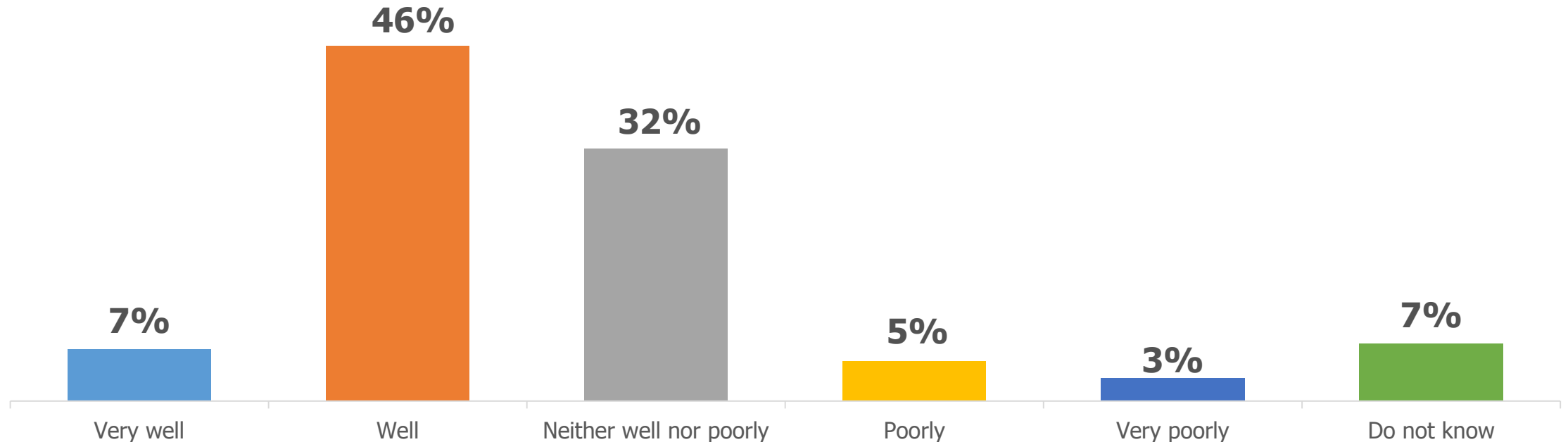
How needs are identified

Key Findings

- ✓ AV and UC technologies are needed the most in **classrooms**.
- ✓ Approximately **half** of respondents **do not agree** that their AV and UC technologies meet student and instructor needs.
- ✓ Multiple events affect the decision to procure AV and UC technologies, with **cost** being a major factor in deciding what to buy

Existing AV/UC Technology

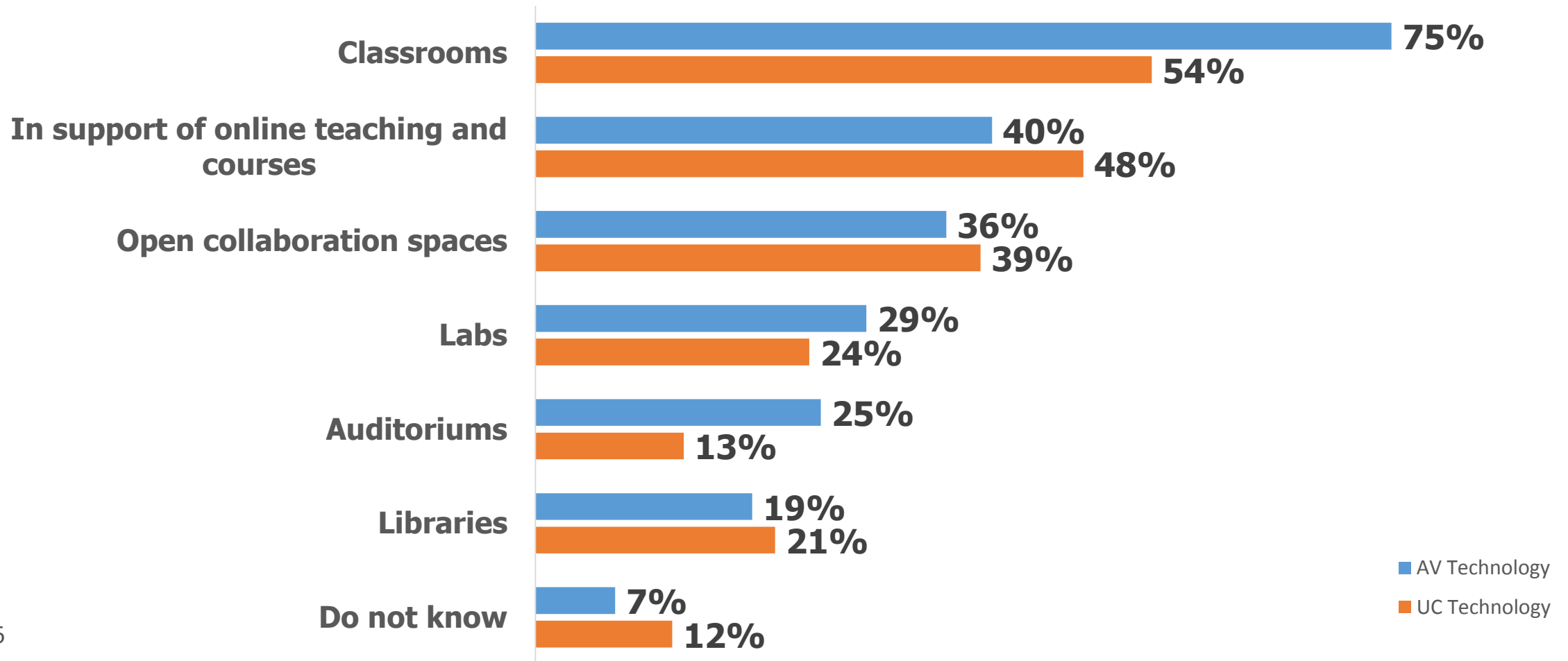
Approximately half of respondents believe that their institution's existing AV and UC technologies are not meeting student and instructor needs.



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Demand for AV/UC Technology

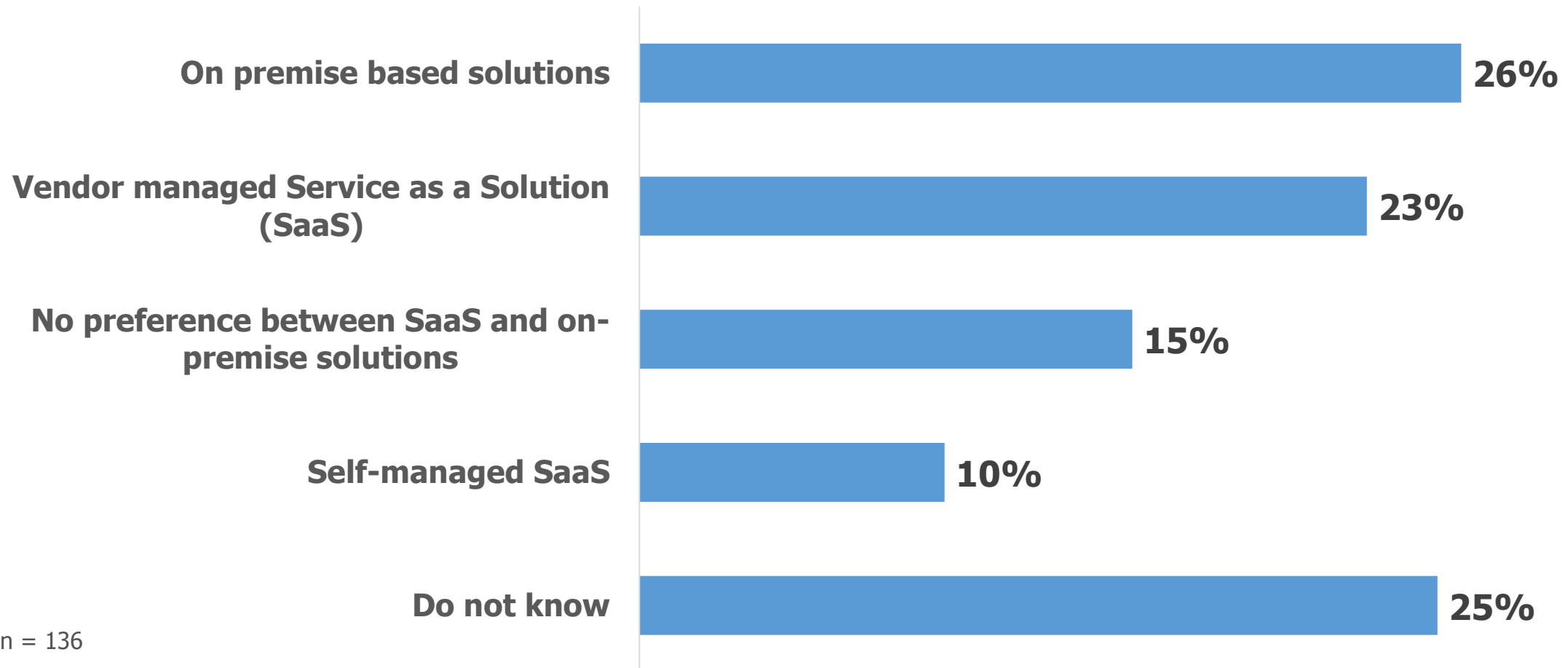
Our respondents need AV and UC technologies in classrooms.



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AV/UC Technology Preferences

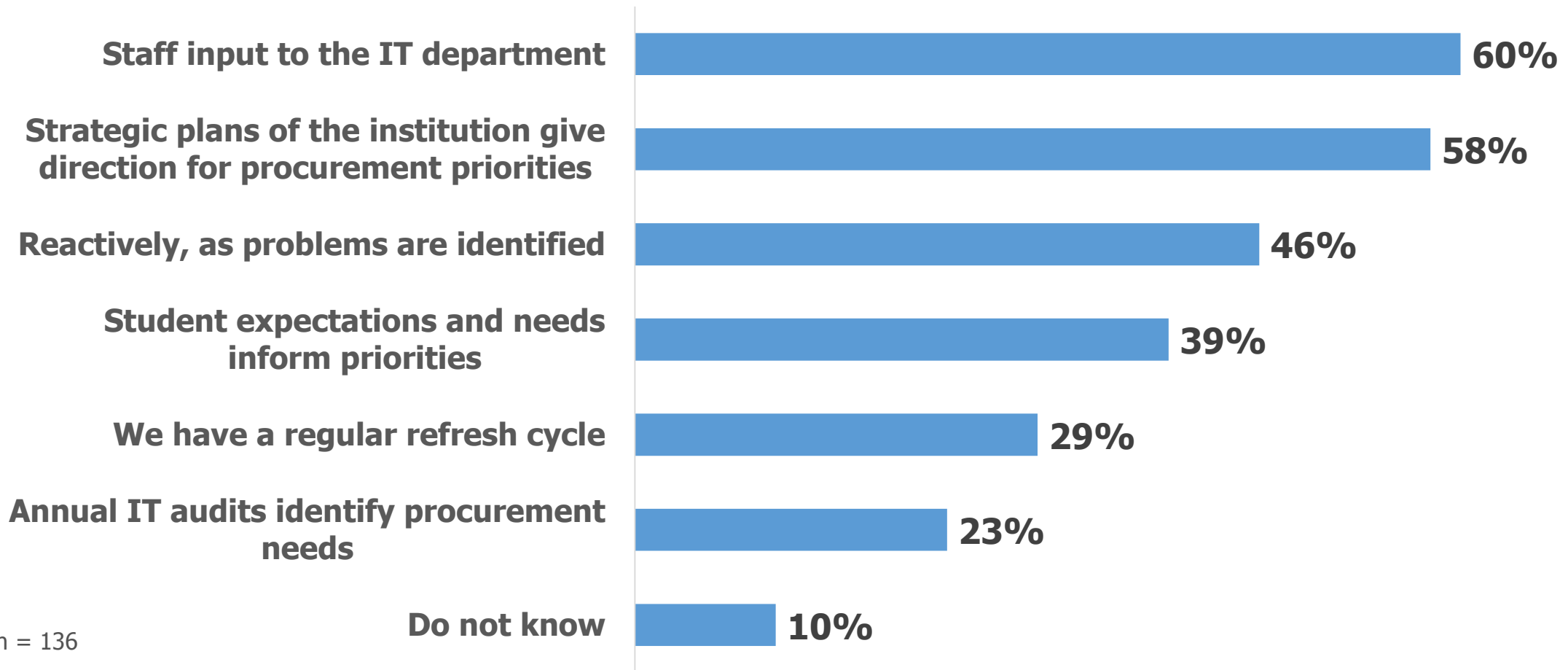
Respondents did not indicate a strong preference between on-premise or as-a-solution



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Identification of Procurement Needs

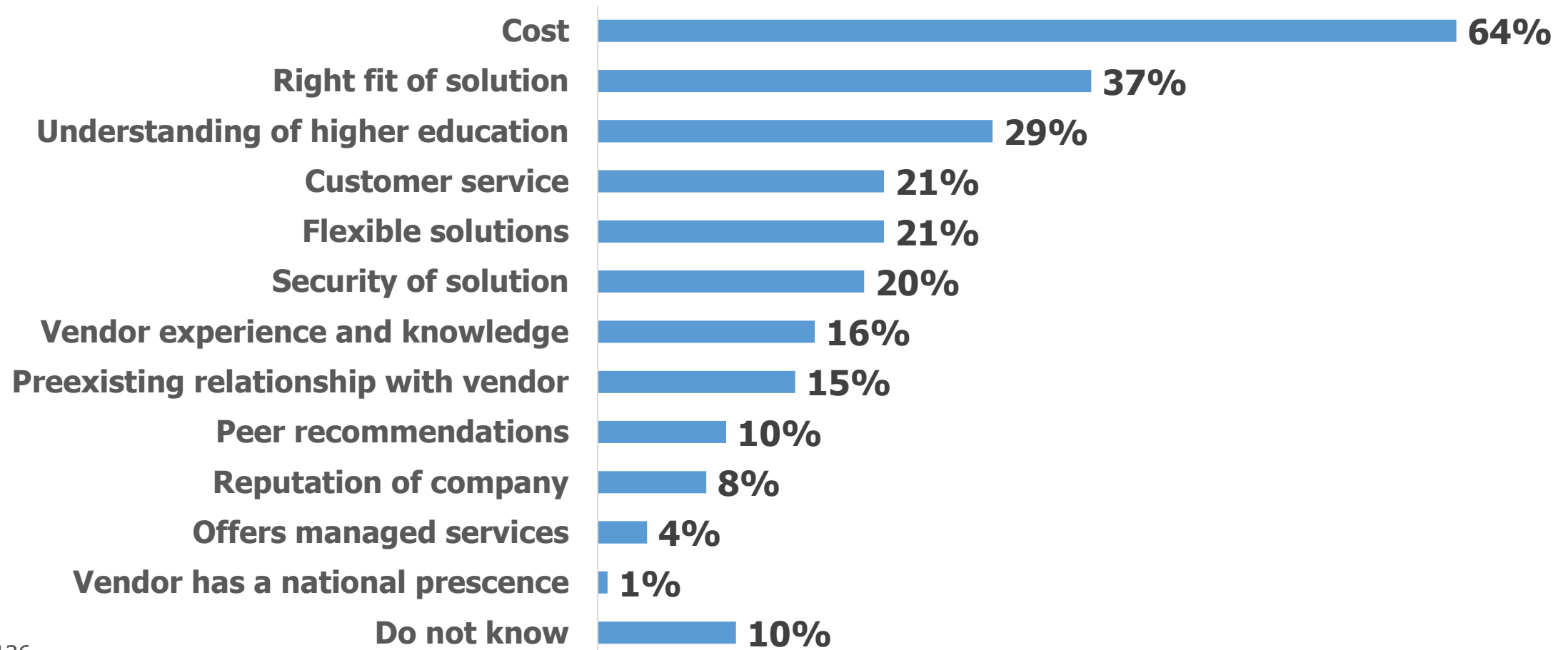
Respondents use multiple methods to identify AV/UC procurement needs



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Procurement Motivators

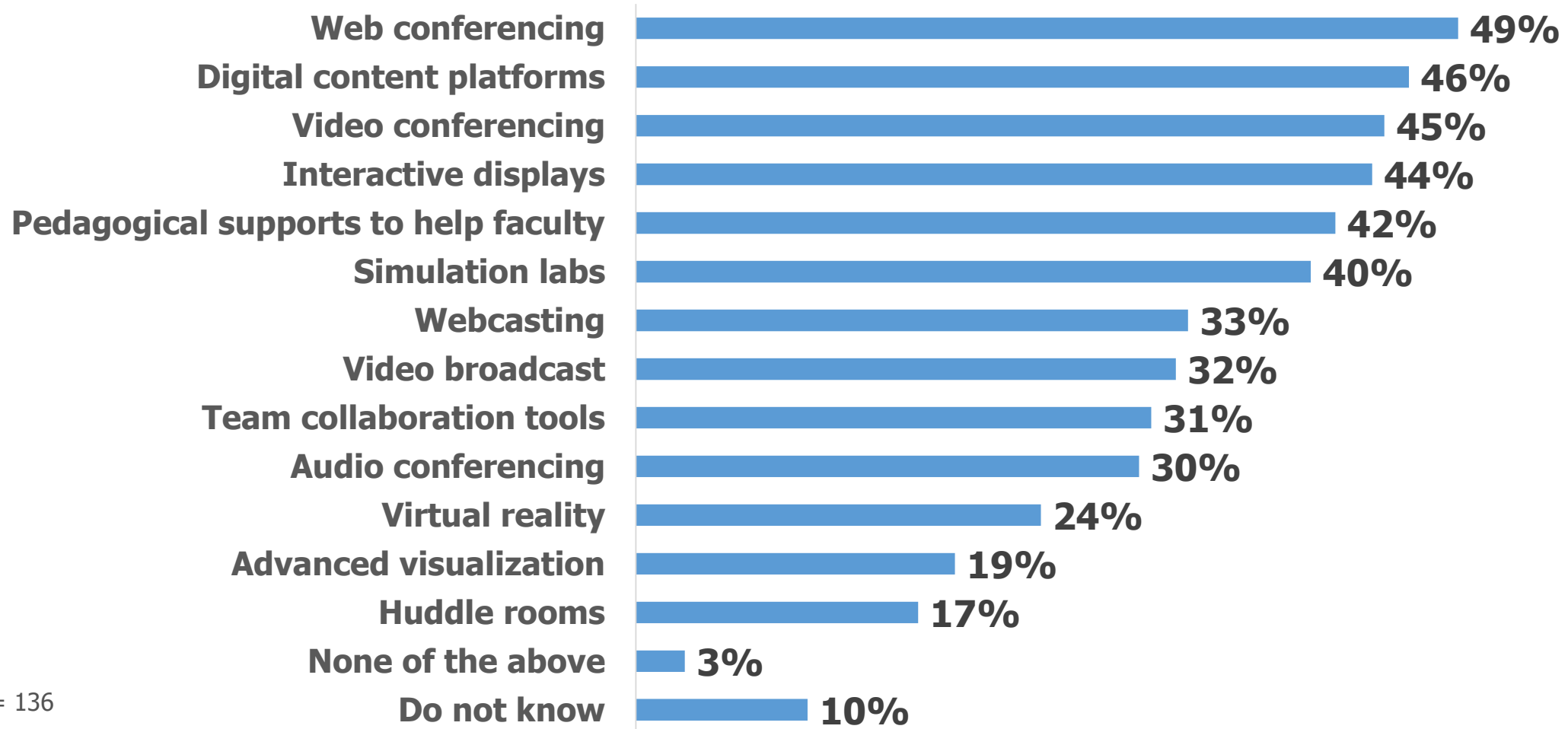
Cost is the major factor for respondents when procuring AV and UC.



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Tech That Defines a Digital Education Space

68% of respondents have a digital education space.



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Overall Survey Key Findings

- ✓ Immediate procurement forecast:
 - ✓ AV technologies are more likely to be procured over UC
 - ✓ Nearly half of respondents were not positive about their current AV/UC technologies meeting needs and demands
- ✓ Five year procurement forecast:
 - ✓ Upgrading existing AV technologies
 - ✓ There is a strong demand for collaborative technologies in research institutions
- ✓ Five year budget forecast:
 - ✓ There will be some shift to operating budgets
 - ✓ Cost will continue to be a paramount consideration for AV and UC procurement

Recommendations

- ✓ Research and content on digital education spaces
 - ✓ What are they (different spaces for different programs)
 - ✓ What technology is needed
 - ✓ Best practices
- ✓ Consultation with CDE experts to design price points for AV and UC technology bundle packages
- ✓ Sponsored webinar on advising institutions on AV and UC technology procurement
- ✓ A follow-up survey resulting in an infographic/report on higher education AV and UC technology refresh cycles and best practices

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