



# Projecting Value

## The ROI Benefits of Digital Projectors

*An IDC White Paper  
Sponsored by InFocus Corp.*

Analyst: Bob O'Donnell

As the great American statesman Benjamin Franklin once said, "Time is money." Nowhere is that sentiment more true than when it comes to effective communication. Whether it's in the classroom, in the boardroom, or in the meeting room, efficient delivery of a message helps maintain an audience's attention, improves its retention, and, most important, saves time.

While much of a delivered message's effectiveness is attributable to the presenter's communication skills, much of it is also due to the tools available to the presenter. Today, the most important of these tools is unquestionably the digital projector. Originally perceived as a specialty item, the digital projector has quickly grown to be an important output device in both schools and businesses. Digital projectors and software presentation tools provide an unbeatable combination for speakers, educators, salespeople, and virtually anyone who needs to create and deliver messages with impact.

As part of a study commissioned by projector market share leader InFocus Corp., independent market research firm IDC sought to quantify the benefits of projectors by surveying 250 individuals in the United States who are involved in the purchase and/or use of digital projectors within their respective organizations. These telephone survey participants, from a sampling of small to large business, government, and education (K-12 and higher education) environments, were asked about their projector usage patterns. The results show unequivocally that using digital projectors translates directly into real-world benefits for both businesses and schools.

Projectors enable both presenters and meeting participants to save valuable time, freeing them up for other productive activities. In particular, using digital projectors can translate into significant savings in presentation preparation time. Projectors also provide tangible real-world cost savings when it comes to printed materials and overheads in many situations. When these direct benefits are combined, annual dollar savings are \$9,291 per projector. Moreover, research results showed that many businesses saved a significant amount of time per meeting when a digital projector was used. By calculating the time value for each meeting attendee, we found that businesses can gain an impressive amount of indirect monetary benefits. Finally, digital projectors offer a large number of other benefits that, while they may not translate directly into hard numbers, provide strong evidence of their overall value and their return on investment (ROI).

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## Key Benefits of Digital Projectors

Respondents to IDC's survey identified several significant benefits of using digital projectors. They indicated that the devices:

- Improve presentation quality
- Improve audience attention and retention
- Reduce meeting preparation time
- Save on material costs
- Reduce meeting length

An often-underestimated benefit of projectors is their ability to reduce meeting length. With the number of participants in meetings using projectors ranging from 5 to 50 or more, the average time savings of about 23 minutes per meeting (based on survey data) can translate to over two people-days of time savings in a single, highly attended meeting.

## PROJECTOR USAGE

Bright, lightweight digital projectors are a relatively new phenomenon; yet, for many people, it's hard to imagine attending a formal presentation, a class lecture, or even a weekly staff meeting where one isn't in use. These projectors are quickly becoming a ubiquitous part of the technology landscape for schools and businesses of all sizes. It's easy to see why. The crisp, bright images displayed by modern digital projectors capture and hold the audience's attention.

Projectors have grown into an important product category over the last several years. According to IDC's research, worldwide projector unit shipments reached a little over 1 million units and enjoyed revenue of \$4.5 billion in 2001. This represents significant unit growth even over the last three years, when IDC first began to track the market. As part of that growth, projectors have reached deeper into many large companies and have also become an important tool for small and medium-sized businesses. According to our survey of organizations using digital projectors, small business sites (less than 100 employees) own 2 projectors on average, medium-sized sites (100–499 employees) own 4, and large sites (500 or more employees) own 15.

In addition, the survey results demonstrate that projector usage is not limited to a select few; instead the devices are being taken advantage of by a fairly wide range of people within business organizations of all sizes. As Figure 1 shows, 38% of business managers said that between 80% and 100% of their employees use digital projectors at least once per year.

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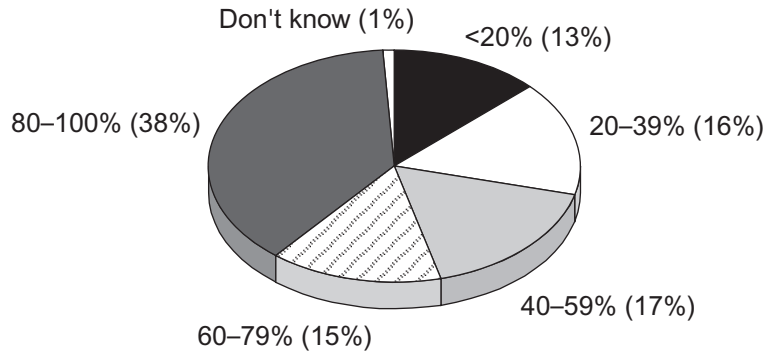
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**Figure 1: Percentage of Employees Who Use Projectors**

Q. Giving your best estimate, what percentage of the employees at your site use a digital projector at least once per year?



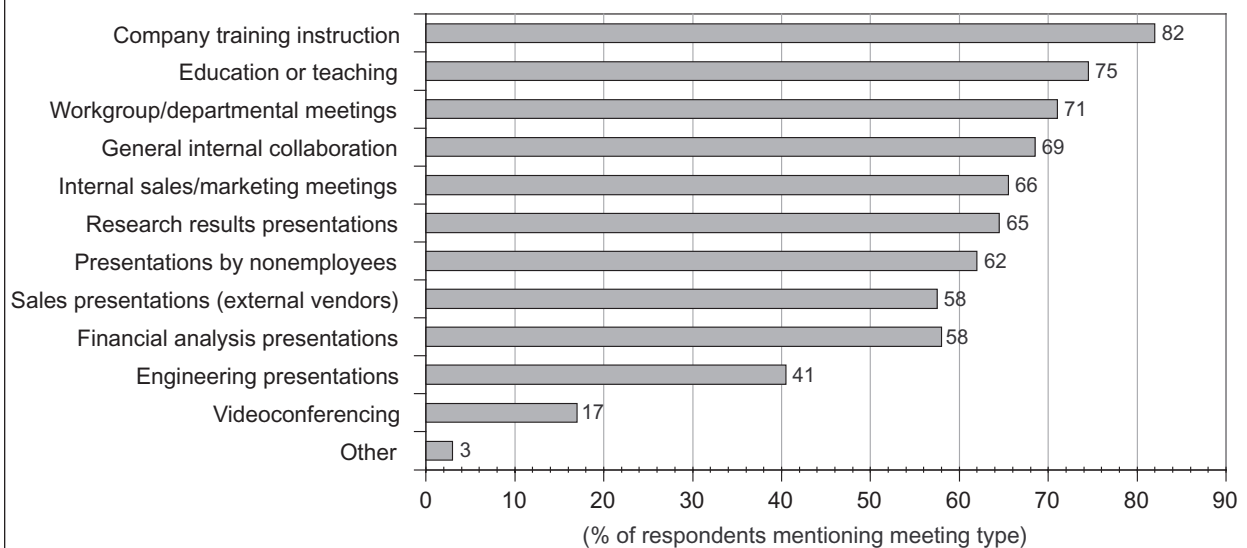
n = 199  
Source: IDC, 2002

Over half of the business managers said that 60% of their employees use projectors at least once a year. Because projectors tend to be used more by those leading meetings, which is typically a smaller minority of total employees, this number is actually quite high and shows the breadth and depth of the influence that projectors have had on businesses that regularly use them.

The list of applications for which business survey respondents said they used projectors was also wide ranging, as Figure 2 shows.

**Figure 2: Projector Uses in Business**

Q. At which of the following types of meetings are digital projectors used at your site?



n = 200  
Source: IDC, 2002

*The projector sits at the very heart of the meeting and plays a critical role in driving it forward.*

The top five uses for digital projectors in business are company training (82%), education or teaching (75%), workgroup or departmental meetings (71%), general internal collaboration (69%), and internal sales/marketing meetings (66%). The figure shows that companies also have many other uses for digital projectors.

The high percentages for each of these applications are particularly interesting because they show that projectors are very flexible devices that can be and are being used for a wide range of meeting types. Though the specific type of information being conveyed via the projector will obviously vary, what remains consistent across these meeting types is that the projector sits at the very heart of the meeting and plays a critical role in driving it forward. The image (and content) displayed by the projector becomes the central point of the attendees' attention and helps keep them directed toward achieving any meeting's ultimate goal, which is to share information and/or facilitate decision making. As this white paper demonstrates, the ability to keep attendees' minds focused translates into dramatic time and dollar savings and compelling ROI justifications for digital projectors.

## **BENEFITS**

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Digital projectors' benefits are not limited to quantitative time and dollar improvements, however. Indeed, some people believe that projectors' primary impact is on the qualitative advantages that they bring to communications, both in business and in educational environments. Improving the quality and effectiveness of the message being delivered, for example, is still of critical importance to projector users.

The survey results show that a large percentage of respondents find digital projectors provide significant or very significant benefits for their business or school in nearly 10 categories. The results for business sites are shown in Figure 3, and the results for educational sites are shown in Figure 4.

At business sites, 96% of respondents said that projectors' ability to enable higher-quality presentations in large meeting rooms is either significant or very significant for them. At educational sites, the number reached 94%, of which 80% said that the benefit is very significant.

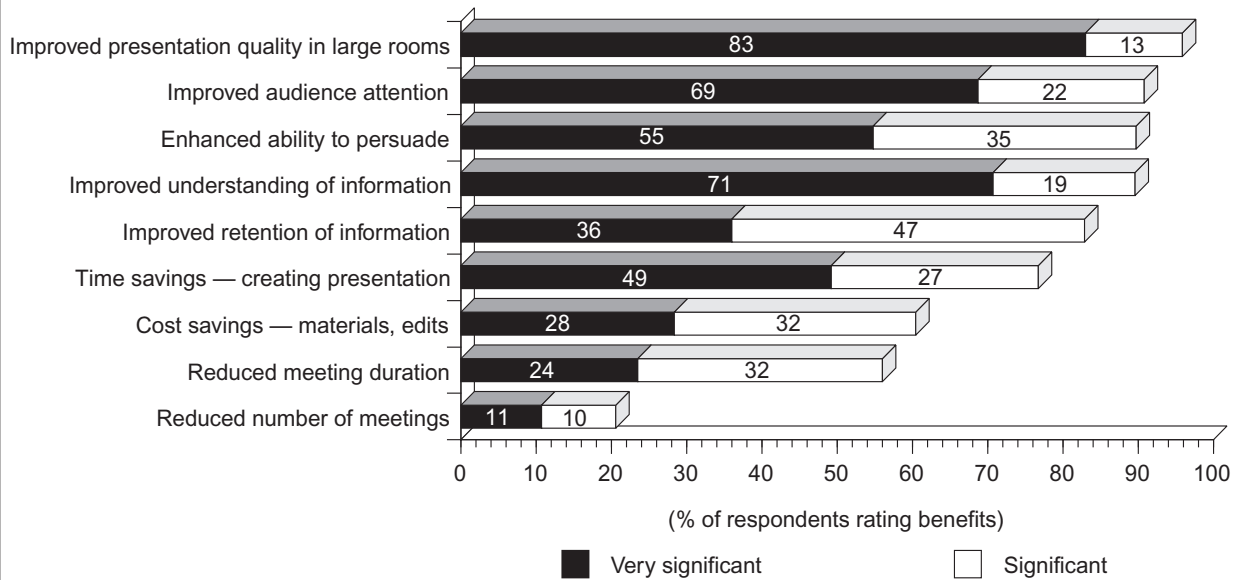
*Research shows that an audience's attention to and understanding and retention of the information being presented are all greatly improved when digital projectors are used.*

Many respondents also feel that the audience's attention to and understanding and retention of the information being presented are all greatly improved when digital projectors are used. In the business survey, 91%, 90%, and 83%, respectively, said that these benefits are important reasons why their companies own and use digital projectors. An enhanced ability to persuade was also noted by 90% of the business projector buyers and users.

The education survey yielded similar results. Improved student attention is cited as significant or very significant by 98% of the respondents, while improved understanding is cited by 90% of the educational group; 80% said that improved retention of information is either significant or very significant to them.

**Figure 3: Projector Benefits in Business**

Q. Please rate the following benefits of using digital projectors at your site.

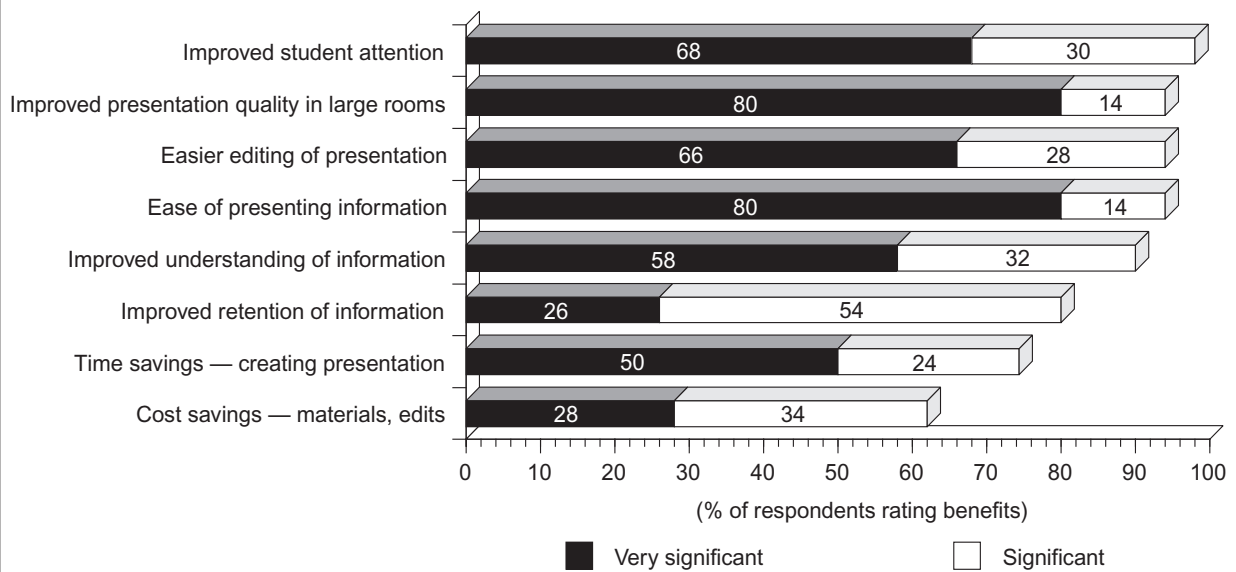


n = 197

Source: IDC, 2002

**Figure 4: Projector Benefits in Education**

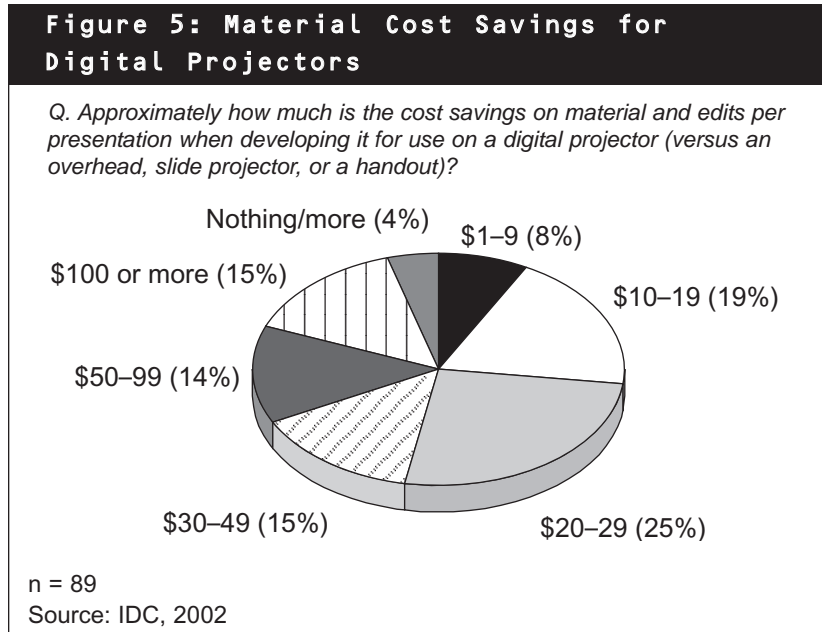
Q. Please rate the following benefits of using digital projectors at your school.



n = 50

Source: IDC, 2002

In addition to noting the qualitative benefits, current projector owners also rated the significance of several quantitative benefits. Twenty-eight percent of the business survey participants rated cost savings in materials versus overhead or slide projectors very significant, while 32% rated it significant. Also, 28% of the education survey participants rated cost savings as very significant, while 34% rated it significant. When prompted for additional information, business respondents noted that the approximate savings per presentation ranged from under \$10 to over \$100, with an overall average of \$42 (see Figure 5).



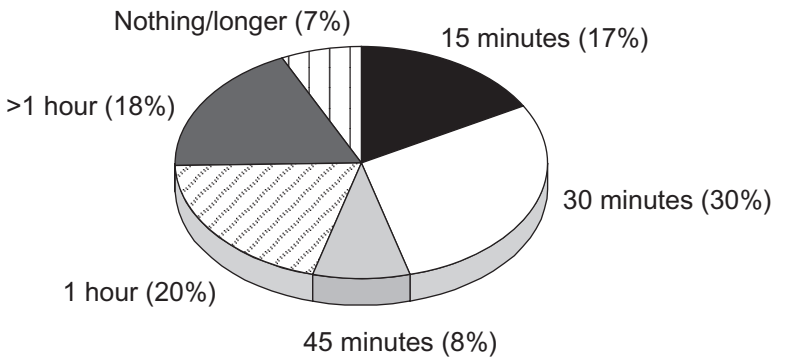
## TIME SAVINGS

As mentioned earlier, using digital projectors also translates directly into time savings, particularly in business environments. The most widely recognized time saver is the reduced amount of preparation time required when using digital projectors and presentation software. Seventy-six percent of respondents at small, medium-sized, and large businesses said that saving presentation preparation time was either significant or very significant. Within that group, the average amount of time saved per presentation was 40 minutes, although the specific amount stretched over a wide range, as shown in Figure 6.

In addition, many respondents reported that meetings in which digital projectors were used were shorter and more efficient than meetings in which they were not used. In fact, 56% of respondents rated this an important benefit of using digital projectors. The amount of time saved per meeting averaged about 23 minutes (see Figure 7). While not all of this time may be translated directly into productivity gains, even a fraction of this amount is significant when considering the number of meetings using projectors and the number of people at each meeting.

**Figure 6: Time Savings for Presentation Preparation**

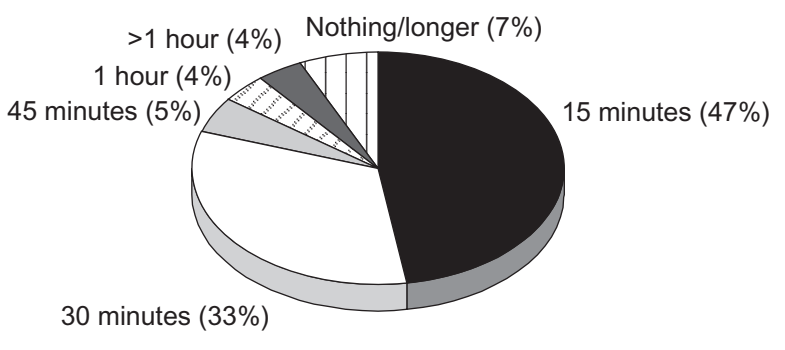
*Q. Approximately how much time per presentation is saved when developing it for use with a digital projector?*



n = 142  
Source: IDC, 2002

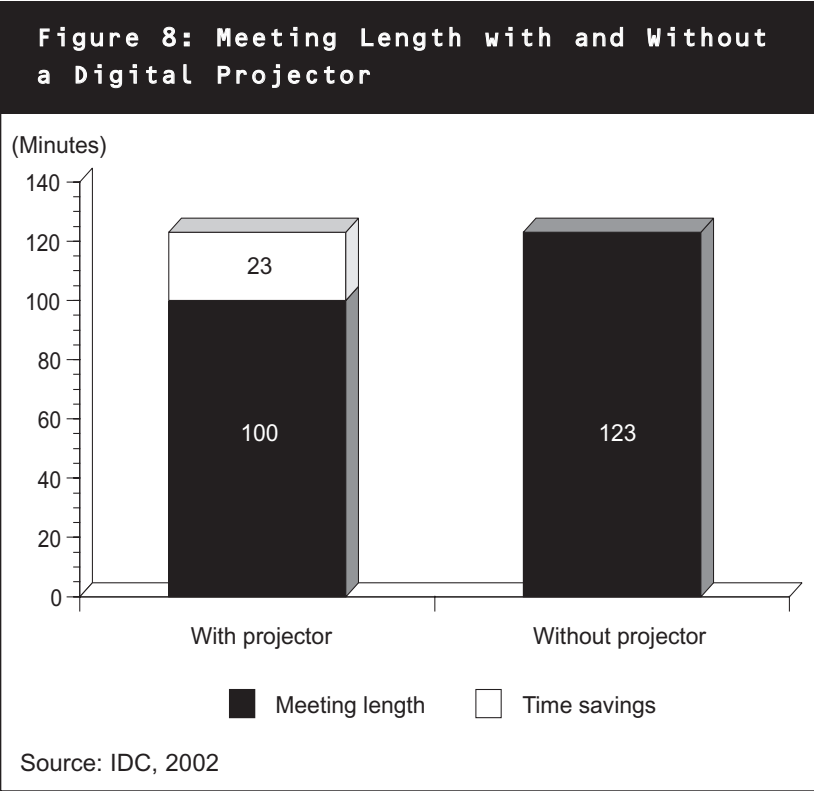
**Figure 7: Time Savings per Meeting with Digital Projector**

*Q. Approximately how much time is saved per meeting when using a digital projector?*



n = 106  
Source: IDC, 2002

The average meeting time when projectors are in use, according to the respondents, is 100 minutes. Without the projector, a meeting would take about two hours. Thus, projectors can slice off about one-sixth of the meeting time (see Figure 8).



In addition to this time savings, a small (22%) but notable group of survey participants felt that using digital projectors could even reduce the number of meetings that were held. Though the numbers were too small to justify a generalization across all projector users, 32% of this group felt that 7–10% of total meetings (or about 1 per month) — and another 24% felt that 20% of all meetings (which is about 2.5 per month) — could be completely eliminated because of the efficiency of other meetings in which digital projectors are used.

**COST SAVINGS MODEL**

To generate a specific dollar savings for digital projectors, IDC created a model to quantify the specific benefits that projectors can provide to corporations. We began with the data collected in the telephone survey and then generated a cost savings model that creates a ROI value for digital projectors.

The model we created is broken into two parts: time and dollar savings for presentation preparation and dollar savings on materials when using a digital projector in place of another presentation device, such as an overhead or slide projector. The final savings tally is an accumulation of these numbers. In addition, although the benefit is more indirect, IDC also calculated a potential savings for meeting times that are shortened through the use of digital projectors.

## Presentation Preparation Time Savings

To build the model, companies must recognize that, as Ben Franklin pointed out, time is money. In fact, according to the U.S. government's Bureau of Labor statistics, the average hourly wage (or wage equivalent) for office workers in 2000 was about \$26. (In many cases, individuals creating presentations are higher-ranking, higher-paid employees, but for purposes of this model, we used this average figure.) Adding 25% for benefits drives the hourly cost to over \$32.

By calculating the total time savings per projector per year and multiplying this by the annualized average salary, IDC was able to determine a dollar value for the time saved creating presentations for a digital projector versus any other type of presentation device. In this case, the variables included an average time savings of 40 minutes per presentation, as mentioned earlier, and the number of presentations created per projector in a typical week, which we computed to be 3.2. In addition, before coming up with a final figure, IDC accounted for those individuals who said time savings per presentation isn't a significant benefit. After doing the math and compensating for different levels of benefits, we came up with a total annual cost savings of \$3,395 per projector.

## Material Savings

IDC also calculated the total amount of material savings from using a digital projector versus an overhead or slide projector. According to survey respondents, the average dollar savings is \$42 per presentation. Multiplying this by the total number of presentations per year, we came up with potential annual savings of \$8,077. Again, subtracting a factor based on the percentage of survey participants who didn't feel this was a benefit of projectors still leaves an annual material savings of \$5,896 per projector.

## Total Savings Using Digital Projectors

Adding the results of these two sections together yields a total annual savings of \$9,291 per projector. Given that IDC estimates the average sales price for a digital projector in 2002 to be \$3,900 and the average amount of annual upkeep costs is \$439 according to survey participants, the results are clear: Digital projectors are an excellent investment. The total three-year savings for a single projector (presuming a 12% discount rate) works out to \$22,317. The net present value of the investment in a projector, based on a three-year analysis, is \$17,101. These numbers translate into a three-year ROI of 328%. As a result, the typical projector can pay for itself in 6.7 months, which is a very positive ROI.

*The typical projector can pay for itself in 6.7 months, which is a very positive ROI.*

Table 1 shows these numbers in more detail and broken out by site size.

<b>Table 1: Business ROI Model for Digital Projectors by Site Size (\$)</b>				
	<b>Small</b>	<b>Medium Sized</b>	<b>Large</b>	<b>Average</b>
Presentation preparation time savings	1,831	3,484	4,869	3,395
Material cost savings	3,181	6,051	8,456	5,896
Total savings per projector per year	5,012	9,536	13,325	9,291
Three-year savings (12% discount rate)	12,039	22,904	32,007	22,317
Three-year projector costs	5,052	5,334	5,262	5,216
Net present value	6,987	17,570	26,745	17,101
Return on investment	138%	329%	508%	328%
Payback period	368 days (12.1 months)	204 days (6.7 months)	144 days (4.7 months)	205 days (6.7 months)

Source: IDC, 2002

### Meeting Time Savings

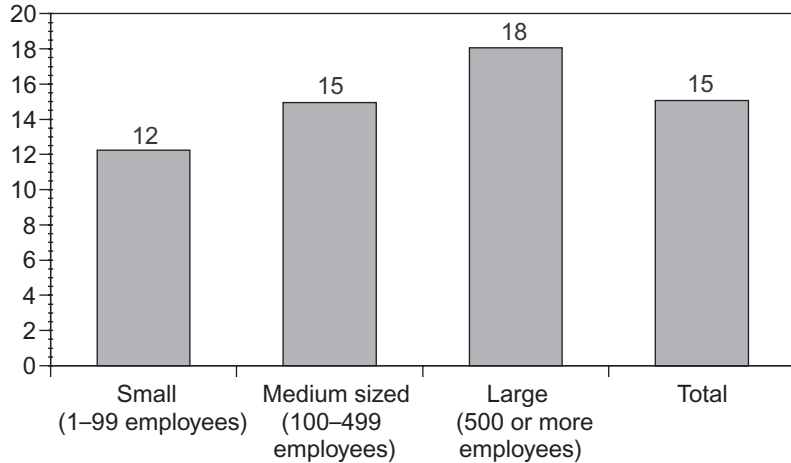
In addition to determining these direct benefits, IDC calculated the more indirect benefit of shortened meetings. As mentioned earlier, the average amount of time saved per meeting with projectors in use is 23 minutes, according to our business respondents. (This figure accounts for the very small percentage of people who responded that projectors add time to their meeting.)

Moreover, the average number of participants in a digital projector–equipped meeting is 15 (see Figure 9). Multiplying the number of minutes saved per meeting by the number of meeting participants generates a total average savings time of 345 person-minutes per meeting.

A key criterion in determining time savings is site size, because of the differing number of participants at an average meeting. Respondents at large sites (500 or more employees) said the average number of participants in a digital projector–equipped meeting is 18; participants at medium-sized sites (100–499 employees) claimed 15; and respondents at small sites (less than 100 employees) cited 12. Therefore, large sites on average have higher total time savings than smaller sites.

**Figure 9: Number of Participants per Meeting by Site Size**

*Q. What is the average number of participants at meetings at which a digital projector is used?*



n = 173

Source: IDC, 2002

IDC also needed to account for the fact that some projector users derive different amounts of benefits; therefore, these time savings cannot be spread equally across the entire universe of projector owners. Incorporating this factor into the calculations leads to an average meeting savings time of 231 minutes (about 3.85 person-hours). Breaking this down into site sizes, we calculated a time savings of 185 minutes (just over 3 hours) for small sites, 231 minutes (about 3.85 person-hours) for medium-sized sites, and 262 minutes (well over 4 person-hours) for the largest sites, all per meeting.

By factoring in the average number of meetings per week in which projectors are used and the average value of the time per employee, you can take this model further. According to IDC's survey results, projectors are used in 6.5 meetings per week. This number was 4 for small companies, 7.8 for medium-sized companies, and 10.9 for large companies.

Translating the total number of minutes saved per meeting into a yearly number of hours saved (by multiplying the number of meetings per week times 52 weeks per year) and then multiplying that number by the average hourly wage mentioned earlier, we arrived at an astounding \$50,457 of potential savings per projector per year for a medium-sized site. The figure is lower for small sites (\$21,728) and higher for large sites (\$84,613) due to the frequency of projector use and average number of meeting attendees. Now, it's important to note that not all businesses will necessarily see all these savings. But even if only 50% of these benefits can actually be translated into real productive time (and, therefore, dollar) savings, the potential for these savings is still quite impressive.

## EDUCATION

Businesses aren't the only organizations to gain tangible benefits from projectors. Schools also save money when it comes to materials and presentation preparation time.

Returning to our survey results, IDC found that educational institutions said that they save about \$15 per presentation on materials. The average number of times per week that a projector is used for a class is 15. By following similar methodology for the cost model used for businesses, we calculated an average annual material cost savings of \$2,157 for each projector used in an educational environment.

In addition, education survey respondents on average said that they saved 39 minutes preparing each presentation destined for use with a projector. Multiplying that by 4 (the calculated number of presentations per projector created by teachers at a given educational institution per week) and then converting that into a yearly dollar figure (using a \$39.99/hour salary figure as the "value" of the time), we arrived at a total dollar savings of \$4,195 per projector per year for presentation preparation time savings. Plus, for teachers who reuse lectures that have been converted to or originally created for use with digital projectors, the time (and, therefore, dollar) savings for presentation preparation can actually grow over subsequent years.

Adding these two subtotals together translates into a total dollar savings of \$6,352 per year for projectors used in education. Applying the ROI model calculations leads to a three-year ROI of 193%. The payback period for a typical projector at education sites, then, works out to 9.8 months, which is a very reasonable timeframe. Plus, the intangible benefits of projectors, particularly improved attention and retention, are extremely important for teachers and professors.

Table 2 shows details of the ROI model for educational sites.

**Table 2: Education ROI Model for Digital Projectors (\$)**

	Total
Presentation preparation time savings per year	4,195
Material cost savings per year	2,157
Total savings per projector per year	6,352
Three-year savings (12% discount rate)	15,257
Three-year projector costs	5,199
Net present value	10,058
Return on investment	193%
Payback period	299 days (9.8 months)

Source: IDC, 2002

## Study Methodology

IDC surveyed 250 companies, schools (K–12 and higher education), and government organizations that use digital projectors to derive the results presented herein. The companies, which range from small to large, are from a representative sampling of industries. The individual respondents include 100 department managers (with at least five direct reports), 100 people involved in purchasing digital projectors for their organizations, and 50 people who purchase digital projectors in education (evenly split between K–12 education and higher education). Respondents answered questions about numbers, usage, benefits, and costs of digital projectors, as well as questions about meeting size and length.

## CHALLENGES

As positive as the benefits of digital projectors may be, some potential challenges still exist for users of the devices. First, the initial purchase price can be a bit of a hurdle for smaller organizations and educational institutions on a tight budget. A payback period of one year or less should help, however. In addition, though projectors have become much easier to use, there can initially be some challenges and time spent in teaching individuals how to set up and use them. The projector industry is still relatively young, and the products are improving at a relatively rapid pace. Finally, the savings and ROI presented in this study reflect the current rates of usage at the organizations studied. Organizations with higher-than-average use of digital projectors (e.g., 50% or more of all meetings use a digital projector) may get reduced ROI for added projectors.

## CONCLUSION

Digital projectors offer businesses and schools a wealth of tangible and intangible benefits. Their ability to increase both the efficiency and efficacy of presentations can lead to improved retention, reduced preparation time, and, in some instances, shorter, yet more effective, meetings. Even better, the ROI story for digital projectors offers strong evidence of their value and their quick payback to the bottom line.

Add to this the reduced prices and increased functionality that today's projector purchasers now enjoy, and the value of digital projectors has never been clearer. Their contribution to organizational timeliness translates into direct bottom-line improvements and, equally important, avoids wasting the valuable commodity of time. As Ben Franklin exhorted, "...do not squander time, for that is the stuff life is made of."

## CASE STUDY

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### Accenture

As an \$11.4 billion, multinational corporation with 75,000 employees in 47 countries, consulting firm Accenture is intimately familiar with the communication demands of today's business environment. The company's army of analysts provides critical financial and strategic advice to companies of all shapes and sizes all around the globe. Much of this advice is delivered via formal presentations and digital projectors.

According to Rolando Bustillos, facilities and services director for the company's 400-person Seattle office, digital projectors are used on a steady, consistent basis for all types of meetings. "The average projector probably gets 12 hours of use per week here for sales/marketing, internal staff, and education-oriented meetings," he says. In the company's 5,000-person Chicago area offices, where Bill Rentz is an audiovisual (AV) specialist, the usage levels jump up to about 20 hours a week.

Rentz explains that some of the company's projectors "...were originally bought to supplement overheads until projectors become more widely accepted. Now, we don't get many calls for overheads or slide projectors."

This predisposition for digital projectors is very easy to understand, according to Bustillos, who sees clear advantages for them over any other type of presentation device. "Projectors give our employees the ability to communicate more quickly and more efficiently — just better," he says. In addition, Rentz thinks the presence of projectors is important to impress clients — or more important, to the converse, the lack of projectors could be distressing to clients. Practically speaking, Rentz also recognizes the value in simply making things big and easy to see. "They let you see the details in a presentation that might otherwise get lost," he says.

"The ability to incorporate video and animations into presentations is also important to Accenture employees," Rentz continues, "and that's something that you can only do with digital projectors."

Bustillos also sees the ability of projectors to make meetings more efficient. "With overheads, people have to take more notes, which makes meetings longer, whereas with projectors, people don't have to because they can get the presentations electronically," he says.

Bustillos is also a fan of the portability of today's projectors. "If you've got a wall, then you can do a presentation anywhere," he says. "Portability is important for any kind of meeting."

In a company as large as Accenture, the only real question about digital projectors is how many it should have in each location. According to Rentz, "If we don't have enough projectors, we have to go out and rent them, which is an additional cost."

Ultimately, the real issue for Bustillos is communication. "Employees working with external clients have the most demand for projectors because they want to make their communications as easy and effective as possible, and projectors make that happen," he says.

## CASE STUDY

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### Portland State University

If you visit the campus of Portland State University (PSU), you'll see students walking around with all sorts of technology tools in tow, from the practically required notebook computer to portable MP3 music players and more. So, it's probably not terribly surprising that if you venture into the classrooms at this 16,000-student university in Portland, Oregon, you'll find more technology as well. Specifically, what you're likely to come across in many classrooms and lecture halls are digital projectors, used increasingly by the university's professors to deliver their teachings.

According to Glen Pullen, an audiovisual (AV) specialist at the school, "Projectors are a pedagogical investment. They add enough to the typical lecture to easily justify their investment." Janet Hamilton, associate professor of finance in PSU's business school concurs. "Projectors allow us to educate our students far more effectively and efficiently than with simple overheads," she says.

Digital projectors enable educators to incorporate more media-rich elements, such as video clips and animations, into their lectures, which is not possible with slide projectors or traditional overheads. Pullen thinks these elements make a big difference to today's students. "Current students expect PowerPoint presentations because they offer a visual process to supplement the standard oral presentation," he says.

Hamilton thinks projectors can also help professors save time, once a lecture has been put into digital form. "On an ongoing basis you can save maybe 50% of your preparation time because of digital technology and the ability to make changes easily." In addition, she explains how PSU recently leveraged its investments in creating digital presentations by reusing many of these lectures for an online MBA program that the university recently started. "Our ability to reuse lectures that were originally created to be used with projectors translated into real time savings," she says.

In addition to saving time, Hamilton believes using digital projectors offers university professors other important, tangible benefits. "You can get your points made more concisely, which allows you to expand and add more material," she says. "You can also have fast access to more background material."

From Pullen's perspective, projectors make an important difference in how effective his AV resources can be. "The ability to edit and combine is much better with a projector than when using overheads," he says. "Also, the flexibility of using a computer to create presentations is much better for professors."

As Pullen concludes, "Projectors reinforce the learning experience for students; they make it easier to remember what's been presented." In fact, the school's projectors are so useful and so widely appreciated that they're in almost constant use. The only complaint that Hamilton has is that there aren't enough to go around. "I wish we had one in every classroom," she says.

## CASE STUDY

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### A Scientific Instrumentation Company

High-resolution scientific instruments bring enormous amounts of visual information to the scientists and researchers who use them. In a similar way, digital projectors can bring tremendous amounts of information to people who use them. As a vice president of a scientific instruments company points out, projectors have quickly become an integral part of his employees' day-to-day working experience. "People are far more comfortable making presentations using this technology," he says.

The company uses digital projectors in all the kinds of applications that you would expect to see modern businesses use them: in-house training and education, external and internal sales meetings, product design and marketing, internal staff collaboration, videoconferencing, and more.

Now that projectors have broken the five-pound weight barrier, the vice president finds that many people at the company treat them as personal accessories for their notebook PCs. "Projector purchases are made via department budgets, not IT, and many of our projectors are assigned to individuals," he says.

He finds that projectors and the digital presentations they inspire can offer several important returns on their original investment. For example, he notes that many of his company's workers now email their presentations or post them on Web sites rather than printing them, which can offer a tangible reduction in printing and consumable costs as well as shipping costs. "When it comes to material savings with projectors, you can save money on both the paper and things like shipping because instead of having to print out and bind and ship these heavy things to something like a conference, you can just send people to Web sites," he says.

Time savings is another important factor for the vice president. "Now what used to take an hour to prepare only takes 30 minutes because you don't have to hover over the printer and feed it overheads," he says.

He sees other benefits as well. "There's a collective technology benefit that projectors are a part of. I'm an executive in this company, but I don't have an admin because the tools available to me, such as scheduling my own appointments and preparing my own presentation materials, are very easy," he says. "So, there's a saving on administrative people costs."

As a product category, projectors have quickly matured into dependable, easy-to-use products that this company's employees use without thinking. The vice president particularly appreciates how little maintenance today's digital projectors require. "The ongoing costs of using a projector are practically zero. I've had one for several years, and it's never needed any service or maintenance at all," he says. "You just turn them on and they work."

The greatest benefit that this vice president sees in today's projectors, however, is convenience. "I can now create a presentation on a plane and then either use my own projector or be confident that I can present a professional presentation because they will have a projector wherever I'm going to make my presentation," he says. "Everyone has projectors these days. They're ubiquitous now."





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02-3318PERSON3318  
May 2002



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