2018 | 2019 **MARKET ANALYSIS**

November 2018

About this Deck

WHAT IT IS

- Compilation of data and insights from a wide variety of sources roughly organized by broad topic

INTENDED USES

- **For marketing:** inform buyer persona, marketing tactics, marketing messages, content marketing, market segmentation & targeting for advertising
- **For sales:**
- **For product:**
- **For others:**

AREAS THAT NEED MORE DEVELOPMENT (11/4)

- B2B market summary and buyer personas
- Global markets
- Competitive landscape

ADDITIONAL RESOURCES

- Research library spreadsheet w/ links to sources (will continue to be updated with new sources)
- Document with big takeaways from market research (in progress as of 11/4)

Outline

Market Summary

Financial Data

- Education Market: Big Picture
- Supplemental Materials
- Teacher Spending

Market Trends

- Adoption of Digital
- Adoption of Video
- Teaching Methodologies
- Special Markets
- Policy
- Other Trending Topics

Competitive Landscape

Buyer Insights

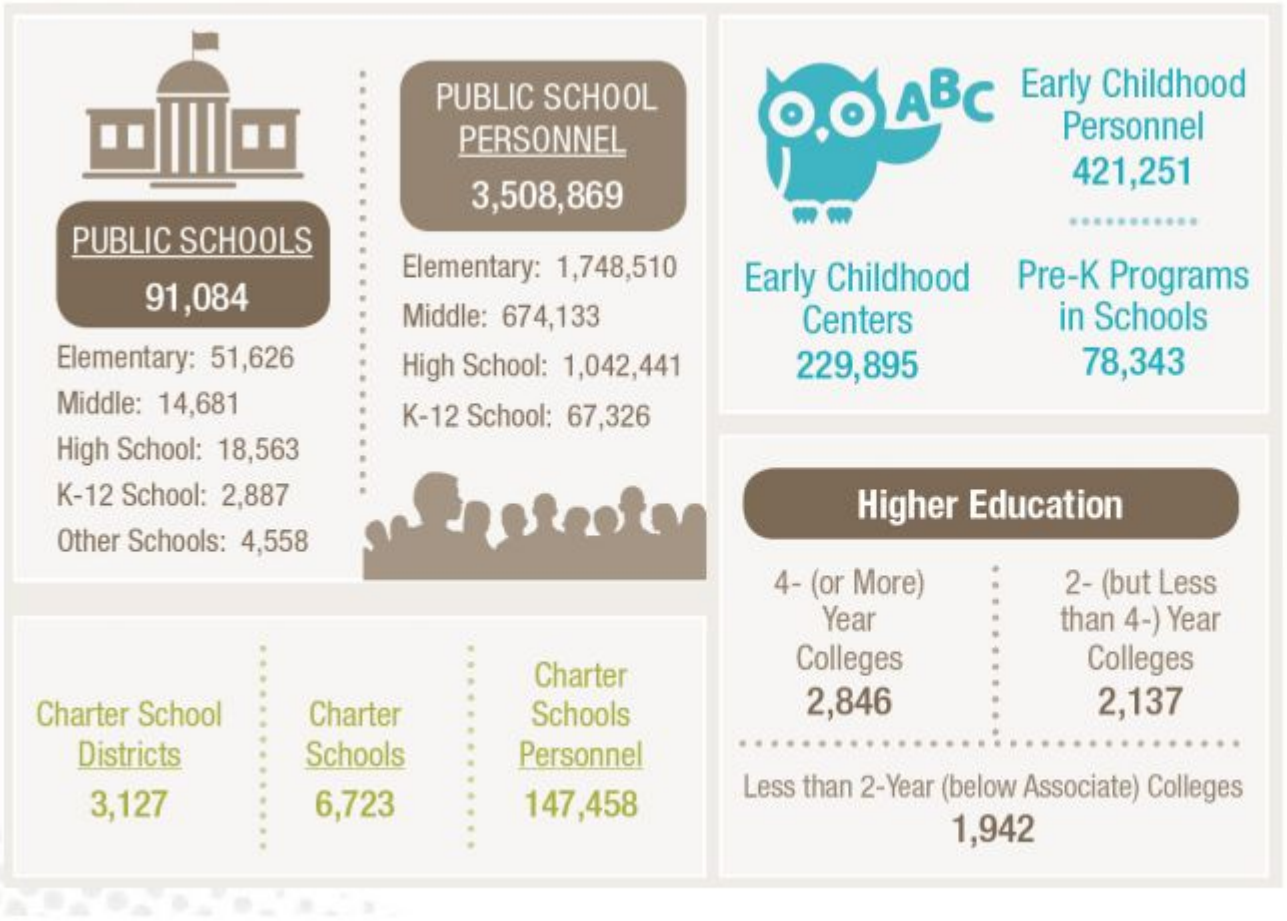
- Purchasing (general)
- Teachers
- District Leaders
- Tech Leaders
- Principals
- Superintendents
- Other Roles

Marketing & Sales Trends in Education

- Content Marketing
- Trends by Channel

MARKET SUMMARY

ENROLLMENT - ALL



U.S. Education Market

16,000 K-12 districts

150,000 K-12 schools

6+ million educators

7,000 higher-ed institutions

$1.3 trillion spent on K-12

20% Annual Change Rate!

Agile EDUCATION MARKETING

Market Summary

ENROLLMENT - BY DISTRICT SIZE

	Small	Med-Small	Medium	Large	Mega
How many in US	10,500	3,327	1,670	924	30
Size (students)	<1.5k	>1.5k	>4k	>10k	>100k
Avg. Students	588	2,480	6,100	23,260	197,700
Avg. # Staff	78	322	746	2,604	21,900
Avg. # Teachers	56	199	448	1,557	12,000
Avg. # Schools	2	5	10	35	300
Avg. Budget	$9m	$31m	$75m	$245m	$2.1b

ENROLLMENT - P-K-12

SIMBA: The Complete K-12 Report: Market Facts & Segment Analysis 2015

Preschool and Kindergarten Enrollment	2015	2016	
Percentage of children enrolled in preprimary education			
3-year-olds	38%	42%	
4-year-olds	67%	66%	
5-year-olds	87%	86%	
Elementary and Secondary Enrollment	**Fall 2014**	**Fall 2015**	
Number of students enrolled in public schools	50.31 million	50.44 million	▲
Prekindergarten through 8th grade	35.37 million	35.39 million	▲
9th through 12th grade	14.94 million	15.05 million	▲
Public Charter School Enrollment	**Fall 2014**	**Fall 2015**	
Number of students enrolled in public charter schools	2.7 million	2.8 million	▲
Percentage of public school students enrolled in charter schools	5.4%	5.7%	▲
Number of public charter schools	6,750	6,860	▲
Percentage of public schools that are charter schools	6.9%	7.0%	▲
Private School Enrollment	**Fall 2013**	**Fall 2015**	
Total number of students enrolled in private schools (prekindergarten through 12th grade)	5.4 million	5.8 million	▲
Prekindergarten through 8th grade	4.1 million	4.3 million	▲
9th through 12th grade	1.3 million	1.4 million	▲
Percentage of all students enrolled in private schools (prekindergarten through 12th grade)	9.7%	10.2%	▲

- P-K-5 represents nearly half of total public school enrollment and half the total revenue in K-12 market
- It would require 3.5 times as many calls (sales calls, catalogs, etc.) to cover the entire grades P-K-5 market segment compared to the middle school/junior high market.

IES: The Condition of Education: May 2018

Table 2.9
Public School Enrollment By Grade, 2014-15 School Year

Grade	Enrollment	% of Total	% of Total
Pre-K	1,320,000	2.6%	
K	3,801,000	7.5%	- -
1	3,865,000	7.7%	- -
2	3,802,000	7.5%	Grades Pre-K - 2: 25.3%
3	3,790,000	7.5%	- -
4	3,770,000	7.5%	- -
5	3,758,000	7.5%	Grades Pre-K - 5: 47.8%
6	3,761,000	7.5%	- -
7	3,761,000	7.5%	- -
8	3,794,000	7.5%	Grades 6-8: 22.5%
9	4,155,000	8.2%	- -
10	3,805,000	7.5%	- -
11	3,499,000	6.9%	- -
12	3,404,000	6.8%	Grades 6-12: 51.9%
Ungraded	121,000	0.2%	- -
Total	**50,407,000**	**100%**	- -

Source: National Center for Education Statistics (NCES), Fall 2014 projection.

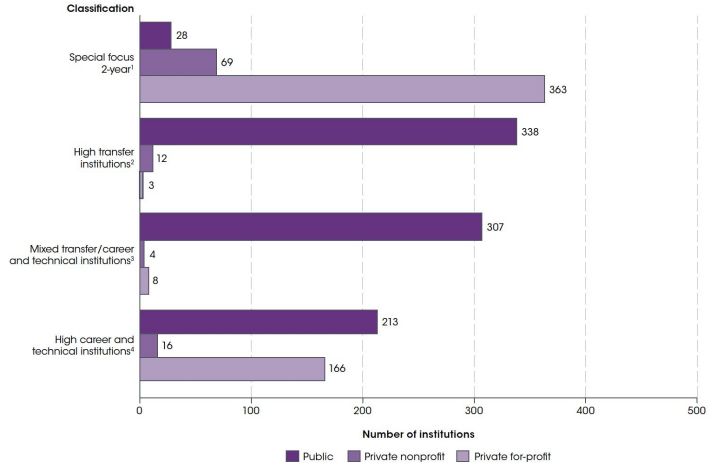
Market Summary

ENROLLMENT - HIGHER ED

Undergraduate Enrollment	Fall 2015	Fall 2016	
Total enrollment	17.0 million	16.9 million	▼
Full-time enrollment	10.6 million	10.4 million	▼
Part-time enrollment	6.4 million	6.4 million	▼ [5]
Percentage enrolled in any distance education course	29%	31%	▲
Percentage enrolled exclusively in distance education	12%	13%	▲

Postbaccalaureate Enrollment	Fall 2015	Fall 2016	
Total enrollment	2.9 million	3.0 million	▲
Full-time enrollment	1.7 million	1.7 million	▲ [5]
Part-time enrollment	1.3 million	1.3 million	▲ [5]
Percentage enrolled in any distance education course	34%	37%	▲
Percentage enrolled exclusively in distance education	26%	28%	▲

Figure 4. Number of 2-year degree-granting institutions, by classification and control of institution: Fall 2016



IES: The Condition of Education: May 2018

Market Summary

ENROLLMENT - CHARTER & OTHER SCHOOLS -

Table 16.11 **Student Membership In Operating El-Hi Schools By School Type, 2011-12**	
School Type	Number Of Students
Regular	48,273,539
Special Education	195,161
Vocational Education	159,905
Alternative Education	627,515
Charter*	2,057,599
Magnet*	2,248,177
Total Number Of Students	**49,177,617**
*Charter and magnet schools are also included under regular, special education, vocational, or alternative schools as appropriate.	
Source: U.S. Department of Education	

- Consider targeting charter schools in addition to public schools, but note that price per student is lower

CER said charters are funded at 61% of their district counterparts. On average, charters are funded at $6,585 per pupil compared to $10,771 per pupil conventional district public schools.

Market Summary

ONLINE PROGRAMS

- 48 states and District of Columbia support online learning opportunities

FULL-TIME SCHOOLS	
State Operated	- The Florida Virtual School - Utah Electronic High School - NC Virtual Public School
District Operated	- Karval Online Education - Campbell County Virtual School - Salem-Keizer Online
Charter Operated	- Guided Online Academic Learning Academy

BLENDED LEARNING	
State Operated	- Michigan Virtual School
District Operated	- Walled Lake Consolidated School District - Riverside Virtual School
Charter Operated	- San Francisco Flex Academy - Rocketship - Carpe Diem Collegiate High School - iPrep Academy

OPEN EDUCATIONAL RESOURCES
- Open High School of Utah - CK-12 - Leadership Public Schools - Khan Academy - Mooresville Graded School District - Vail Unified School District

USE DIGITAL RESOURCES WELL
- High Tech High - New Technology High School - Quest to Learn

Ed.gov - Use of Technology in Teaching & Learning

Market Summary

FINANCIAL DATA

Education Market - Big Picture

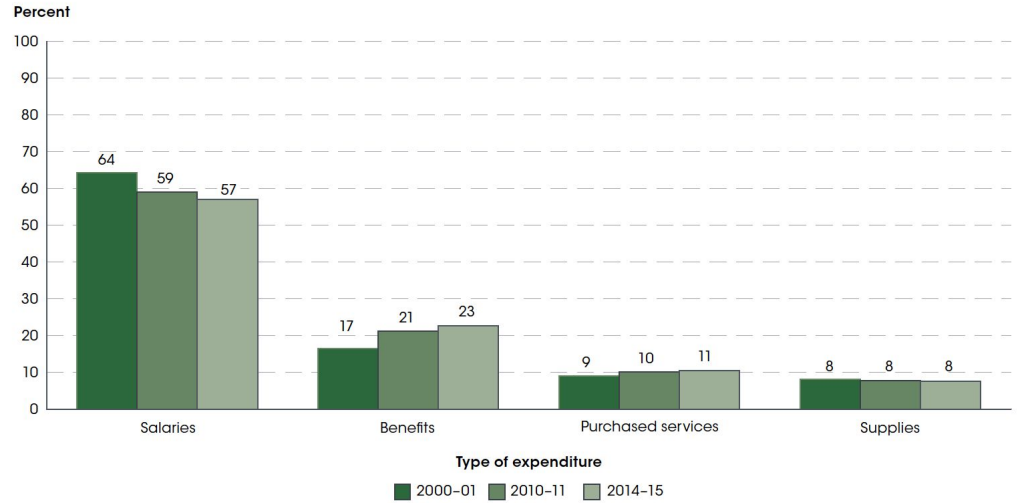
SPEND - PER STUDENT

Total spending: $634 billion; $11,222 per student for the 2013-2014 year via Condition of Education 2017 report

- Salaries and benefits make up 80% of school spending
- 11% for services - PD, food, transformation
- 8% - supplies (textbooks to heating oil)

- Total expenditures in 2014-2015 = $668 billion
- Total expenditure per student: $11,734
- Less than 20% of total education spend is allocated for purchased services and supplies. (Which one would boclips fall under?)

Figure 2. Percentage of current expenditures per student in fall enrollment in public elementary and secondary schools, by type of expenditure: 2000–01, 2010–11, and 2014–15



Public School Expenditures[2]	2013–14	2014–15	
Total expenditures	$645 billion	$668 billion	▲
Current expenditures per student	$11,429	$11,734	▲

- See state funding by state here

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IES: The Condition of Education: May 2018

SPEND - PER CLASSROOM

Table 9.34
Average Classroom Expenditure By Type Of Material

TYPE OF SCIENCE MATERIAL	AVERAGE EXPENDITURE
Lab supplies/manipulatives	$2,499
Lab equipment	$1,411
Online services	$1,049
Software	$601
Reference materials	$422
Assessment/test preparation	$234
Teacher resource materials	$220
Workbooks/other print	$208
Videos	$52
Interactive Whiteboard tools/content	$24
All Other	$492

SIMBA: The Complete K-12 Report: Market Facts & Segment Analysis 2015

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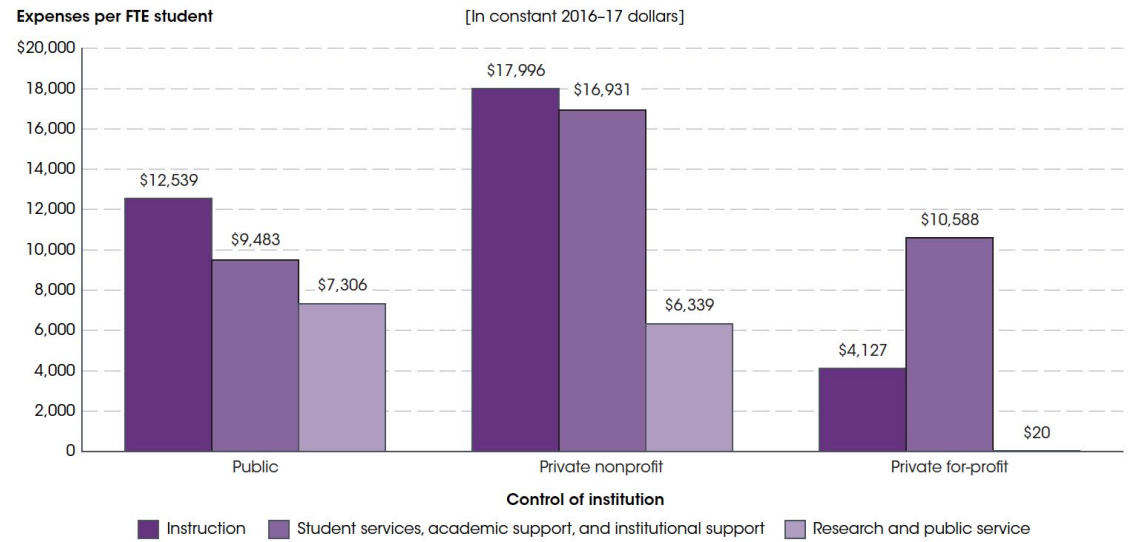
SPEND - HIGHER ED

In 2015–16, instruction expenses per full-time-equivalent (FTE) student (in constant 2016–17 dollars) was the largest expense category at public institutions ($10,422) and private nonprofit institutions ($17,860). At private for-profit institutions, the combined category of student services, academic support, and institutional support expenses per FTE student was the largest expense category ($10,398).

Figure 2. Expenses per full-time-equivalent (FTE) student at 4-year degree-granting postsecondary institutions, by purpose of selected expenses and control of institution: 2015–16



IES: The Condition of Education: May 2018

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SPEND - US vs. GLOBAL (K-12)

In 2014, the United States spent $12,300 per full-time-equivalent (FTE) student on elementary and secondary education, which was 29 percent higher than the OECD average of $9,600. At the postsecondary level, the United States spent $29,700 per FTE student, which was 81 percent higher than the OECD average of $16,400.

- US spends more per K-12 student than OECD average
- Other places where spend is high and trending up:
  - Norway, Switzerland, Austria, Belgium, UK, Denmark, Sweden
- Spend is low in Mexico, Chile, Hungary, Poland, Israel …

Figure 1. Expenditures and percentage change in expenditures per full-time-equivalent (FTE) student for elementary and secondary education from 2005 to 2014, by Organization for Economic Cooperation and Development (OECD) country

[In constant 2016 U.S. dollars]

OECD country	2005	2014	Percent change, 2005 to 2014
Norway	$12,600	$15,000	19
Switzerland[1,2]	10,900	14,900	36
Austria	11,500	13,700	19
United States[3]	12,000	12,300	3
Belgium	9,000	12,200	36
United Kingdom	8,900	12,100	36
Denmark	10,700	11,400	6
Sweden	8,900	11,100	25
Iceland	15,800	11,000	-30
Germany	8,200	10,900	33
Netherlands	8,300	10,800	30
Canada[3,4]	9,300	10,700	15
Republic of Korea	7,300	10,200	41
Japan	7,600	10,000	32
France	8,500	10,000	17
Finland	7,900	9,800	24
Australia	9,400	9,700	3
OECD average[5]	**8,300**	**9,600**	**15**
Ireland	7,200	9,200	27
New Zealand	7,100	9,100	29
Slovenia	8,600	9,000	4
Italy[1,3]	8,700	8,800	#
Portugal[1,3]	6,600	7,800	18
Spain	7,700	7,700	1
Czech Republic	5,100	7,000	37
Estonia	5,300	7,000	32
Israel	6,100	6,700	9
Poland[1]	3,900	6,600	68
Slovak Republic[2]	3,400	6,300	86
Hungary[1]	5,900	5,600	-4
Chile	3,100	4,500	47
Mexico	3,100	3,200	4

-50 -40 -30 -20 -10 0 10

Percentage chan

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IES: The Condition of Education: May 2018

SPEND - US vs. GLOBAL (Higher Ed)

- US spends more per post-secondary student than all other OECD countries
- Other places where spend is high and trending up:
  - Switzerland, UK, Sweden, Norway, Netherlands, Japan

Figure 2. Expenditures and percentage change in expenditures per full-time-equivalent (FTE) student for postsecondary education from 2005 to 2014, by Organization for Economic Cooperation and Development (OECD) country

[In constant 2016 U.S. dollars]

OECD country	2005	2014	Percent change, 2005 to 2014
United States	$29,900	$29,700	-1
Switzerland[1,2]	22,200	27,400	23
United Kingdom	17,400	24,700	42
Sweden	18,000	24,300	35
Norway	19,600	22,200	13
Canada[1,3]	27,400	21,900	-20
Netherlands	16,400	19,300	18
Australia	19,200	18,500	-3
Japan[4]	12,700	18,100	43
Finland	14,700	17,900	22
Germany	14,500	17,300	20
Austria	18,100	17,200	-5
Belgium	14,700	17,000	16
Denmark[1,4]	17,800	16,700	-7
France	12,500	16,500	31
OECD average[5]	**13,900**	**16,400**	**18**
New Zealand	12,800	15,200	19
Ireland	11,800	14,100	20
Israel	13,200	12,800	-3
Spain	12,100	12,400	3
Estonia	5,500	12,300	126
Slovenia	10,500	12,000	15
Portugal[1,4]	10,300	11,900	16
Iceland[4]	16,900	11,800	-30
Italy[1]	9,500	11,500	21
Slovak Republic[1,2]	7,200	11,200	55
Czech Republic	8,300	10,600	28
Republic of Korea	9,800	9,700	-1
Poland[1]	6,900	9,600	38
Mexico	9,800	9,500	-3
Hungary[1]	9,100	8,700	-4
Chile	10,100	8,500	-16

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Percentage change

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IES: The Condition of Education: May 2018

Supplemental Materials

SUPPLEMENTAL MATERIALS - SPEND (K-12)

Table 2.5
K-12 Market Estimates By Grade Level, 2014-15 SY
(Excluding technology sales)
($ in millions)

Grade Level	Est. % of Total	Text Mkt. Size	Supp. Mkt. Size	Total
Pre-K - 5	48%	$1,806	$3,207	$5,013
6-8	23%	$865	$1,537	$2,402
9-12	29%	$1,092	$1,938	$3,030
Total	**100%**	**$3,763**	**$6,682**	**$10,445**

Source: Education Market Research

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SIMBA: The Complete K-12 Report: Market Facts & Segment Analysis 2015

SUPPLEMENTAL MATERIALS - MARKET SIZE

Table 2.2
Total K-12 Market Size Estimates, 2007-08 Through 2014-15
(In millions of dollars)

Market Segment	07-08	08-09	09-10	10-11	11-12	12-13	13-14	14-15	Avg. Inc.
Technology Products: Hardware, Software, Internet	7,089	7,230	7,592	8,025	8,813	9,650	10,712	11,355	7.0%
Instructional Materials: Textbooks	3,312	3,358	3,404	3,506	3,594	3,666	3,739	3,763	1.6%
Supplemental Materials: Excluding Only Textbooks	5,161	5,284	5,406	5,677	5,929	6,114	6,528	6,682	3.8%
Total	**15,562**	**15,872**	**16,402**	**17,208**	**18,336**	**19,430**	**20,979**	**21,800**	**4.9%**

Source: Education Market Research

SIMBA: The Complete K-12 Report: Market Facts & Segment Analysis 2015

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SUPPLEMENTAL MATERIALS - SALES BY SUBJECT

Table 2.10
K-12 Market Estimates By Grade Level, Subject And Product Type, 2014-15 SY
(Excluding technology sales)
($ in millions)

GRADE LEVEL	READ/LA	MATH	SCIENCE	SOCIAL STUDIES
Pre-K - 2	$300 textbooks	$175 textbooks	$79 textbooks	$71 textbooks
	$421 supplements	$278 supplements	$120 supplements	$103 supplements
3-5	$438 textbooks	$227 textbooks	$99 textbooks	$89 textbooks
	$697 supplements	$451 supplements	$199 supplements	$176 supplements
6-8	$352 textbooks	$297 textbooks	$126 textbooks	$111 textbooks
	$616 supplements	$418 supplements	$175 supplements	$161 supplements
9-12	$498 textbooks	$365 textbooks	$155 textbooks	$137 textbooks
	$729 supplements	$488 supplements	$212 supplements	$192 supplements
TOTAL	**$4,051 textbooks + supplements**	**$2,699 textbooks + supplements**	**$1,165 textbooks + supplements**	**$1,040 textbooks + supplements**

Source: Education Market Research

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SIMBA: The Complete K-12 Report: Market Facts & Segment Analysis 2015

SUPPLEMENTAL MATERIALS - SALES

Table 3.4
Estimated Number Of Companies In The Supplemental Products Market

COMPANY TYPE	MEAN ESTIMATE	MEDIAN ESTIMATE
Publisher/supplier of supplemental materials	934	468

# of Companies in Supplemental Products

Table 3.33
Estimated Total Industry Supplemental Products Sales, 2010-2013

	2010 MARKET ESTIMATE	2011 MARKET ESTIMATE	2012 MARKET ESTIMATE	2013 MARKET ESTIMATE	% CHANGE 2013 vs. 2012
Supplemental materials	$3.174 billion	$3.149 billion	$3.136 billion	$3.205 billion	+2.2%

Supplemental Products Sales - YOY Growth

	2012	2013	Increase
Cross-curricular	79,582	107,613	+35.2%
Other	126,461	118,616	-6.2%

Supplemental Sales by Subject Area

Software/apps	47,468	54,540	+14.9%
Learning Management or Student Information Systems	138,450	140,490	+1.5%
Online/Digital content/subscriptions	158,636	308,487	+94.5%

Supplemental Sales by Product Application

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SIMBA: The Complete K-12 Report: Market Facts & Segment Analysis 2015

Teacher Spending

TEACHER SPENDING - BY CATEGORY

Table 10.40
Teacher Spending On Classroom Learning Materials By Category

TYPE OF LEARNING MATERIAL	AVERAGE EXPENDITURE	2009-2010 ESTIMATED MARKET SIZE
Books/Literature	$315	$196 million
Technology	$193	$120 million
Manipulatives	$173	$107 million
Teacher Resource	$171	$106 million
Audiovisual	$75	$47 million
Display	$74	$46 million
Reference	$44	$27 million

Average spending, compared to 2002 results, is actually down in the books/literature (-2.2%), manipulatives (-2.8%), and reference (-6.4%) categories. Those drops are more than compensated for by a 402.1% increase in the technology, 21.3% increase in the teacher resource, 21.0% increase in the audiovisual, and 12.1% increase in the display categories.

So the 47.1% gain for this market segment compared to eight years ago is easily explained by higher average spending in four categories, particularly technology, applied across an additional 1.2 million students in grades Pre-K - 2, and 67,000 additional classrooms.

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SIMBA: The Complete K-12 Report: Market Facts & Segment Analysis 2015

TEACHER SPENDING - DIGITAL PRODUCTS

What do we know about how teachers and districts select and purchase digital instructional tools?

- Teachers don't use their own money to purchase the majority of the instructional technology they use with their students. Teachers in this survey said that only 4 percent of the digital products they use are purchased with their own money.
- Teachers are just as likely to find effective the free products they use as they are those purchased for them by their school or district.
- Teachers don't get to choose many of the products their students use, but when they are given the opportunity to select them, they are more likely to report that products were effective.
- Teachers said they find out about products primarily by word of mouth from other teachers and administrators, at professional meetings, and online via search engines and social media.
- Districts spend much more on ELA-only products than is suggested by the extent to which teachers direct their students to use these products frequently or rate them as effective.

Teachers in this survey said that only 4 percent of the digital products they use are purchased with their own money.

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Teachers Know Best - Bill & Melinda Gates

MARKET TRENDS

Adoption of Digital

ADOPTION OF DIGITAL - KEY STATS

- Teachers said they're searching for guidance around approved and curated content for instruction, with 25 percent of those surveyed saying they are looking for resources organized by grade level and content area to support their digital content integration, 57 percent said they are looking for planning time to work with colleagues, 36 percent are seeking in-school coaching to help them find and use high-quality digital resources, and 28 percent are looking for online tools that help organize and keep track of digital resources.
- Surveyed school principals (84 percent) said they believe effectively using technology as part of instruction is a key part of student success, but said there are barriers to meeting those expectations.
- The top-cited barrier was lack of teacher training on how to properly integrate digital content within instruction, which 57 percent of surveyed principals identified as their biggest obstacle.
- Five out of 10 administrators in the survey said implementing digital content resources such as videos, simulations, and animations was already producing positive student outcomes.
- Nearly 60 percent of participating technology leaders said one-quarter of instructional materials in their schools are digital and not paper, and 26 percent said their paper-less resources hover at 50 percent.

Trends that Will Dominate EdTech (source)

1. Virtual Reality
2. Making
3. Computational thinking
4. Sorting out rules for student data use
5. Schools will continue to flub cybersecurity
6. Dominance of Chromebooks (more than half of mobile devices)
7. Videoconferencing will connect more students
8. Trust continue taking a beating

From Print to Pixel 2017

ADOPTION OF DIGITAL - DRIVERS

Since the 2010 NETP, the U.S. has made significant progress in leveraging technology to transform learning in a variety of ways:

- The conversation has shifted from whether technology should be used in learning to how it can improve learning to ensure that all students have access to high-quality educational experiences.3
- Technology increasingly is being used to personalize learning and give students more choice over what and how they learn and at what pace, preparing them to organize and direct their own learning for the rest of their lives.
- Advances in the learning sciences have improved our understanding of how people learn and have illuminated which personal and contextual factors most impact their success.
- Research and experience have improved our understanding of what people need to know and the skills and competencies they need to acquire for success in life and work in the 21st century. Through pre-service teacher preparation programs and professional learning, educators are gaining experience and confidence in using technology to achieve learning outcomes.
- Sophisticated software has begun to allow us to adapt assessments and instruction to the needs and abilities of individual learners and provide near real-time results.
- Nationally, significant progress has been made toward ensuring that every school has high-speed classroom connectivity as a foundation for other learning innovations.
- The cost of digital devices has decreased dramatically, while computing power has increased, along with the availability of high-quality interactive educational tools and apps
- Technology has allowed us to rethink the design of physical learning spaces to accommodate new and expanded relationships among learners, teachers, peers, and mentors. Although we can be proud of the progress of the last six years, there is still much work to do.

Drivers

ADOPTION OF DIGITAL - OBSTACLES

Now, a look at the work ahead:

- A digital use divide continues to exist between learners who are using technology in active, creative ways to support their learning and those who predominantly use technology for passive content consumption.
- While school and district leaders often leverage data for decision-making, many still need support and better tools so they can get real-time information on how strategies are working through rigorous, quick-turnaround evaluations of technology.
- Many schools do not yet have access to or are not yet using technology in ways that can improve learning on a daily basis, which underscores the need—guided by new research—to accelerate and scale up adoption of effective approaches and technologies.
- Schools and districts that are deciding how to incorporate educational technology in student learning should actively involve and engage families during ear early development and implementation of their digital transformation.
- Few schools have adopted approaches for using technology to support informal learning experiences aligned with formal learning goals.
- Supporting learners in using technology for out-of-school learning experiences is often a missed opportunity.
- Many pre-service teacher education graduates feel unprepared to use technology to support student learning as they transition to teaching and using technology effectively in the classrooms.4
- Assessment approaches have evolved but still do not use technology to its full potential to measure a broader range of desired educational outcomes, especially non-cognitive competencies.
- The focus on providing Internet access and devices for learners should not overshadow the importance of preparing teachers to teach effectively with technology and to select engaging and relevant digital learning content.
- As students use technology to support their learning, schools are faced with a growing need to protect student privacy continuously while allowing the appropriate use of data to personalize learning, advance research, and visualize student progress for families and teachers.
- Network security is a growing concern as internet accessible school data, management, and learning systems become more ubiquitous and as the sophistication of attacks on school networks grows, including the use of ransomware.

Obstacles

ADOPTION OF DIGITAL - STUDENT & TEACHER ATTITUDES

How students and teachers feel about digital technology:

- 52 percent of high school students are taking tests online
- 53 percent of 6-12th graders want to use their own mobile devices for school work
- 57 percent of middle-schoolers say online classes provide them more control over their learning
- 3 out of 5 flipped classroom teachers believe online learning increases student confidence and motivation
- 77 percent of parents consider the effective use of technology as vital to their child's future
- 60 percent of district leaders report positive outcomes from digital content implementation.

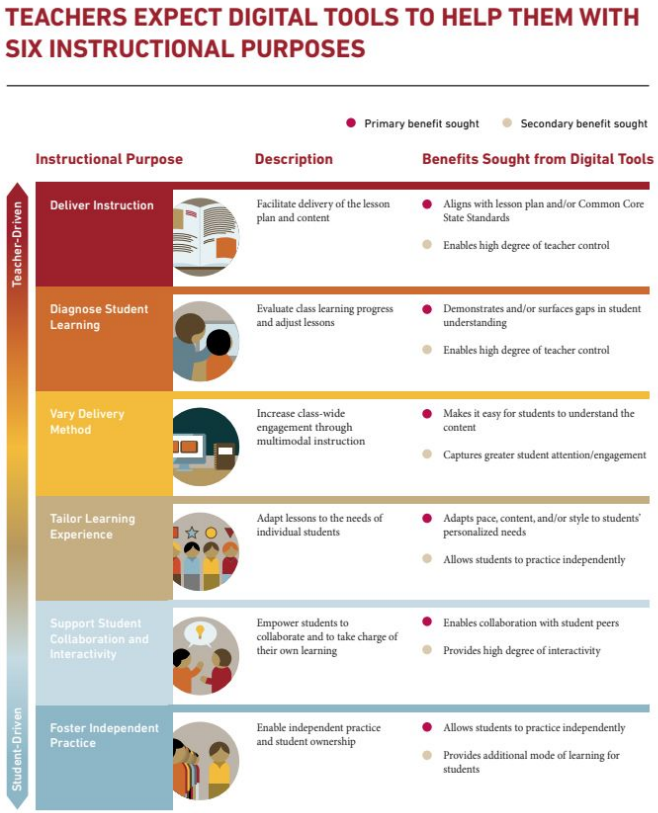
Why Digital Learning Is So Important - Tech.Co

What teachers want from digital tools:

Teachers identified six instructional purposes for which digital tools are useful:

- Delivering instruction directly to students
- Diagnosing student learning needs
- Varying the delivery method of instruction
- Tailoring the learning experience to meet individual student needs
- Supporting student collaboration and providing interactive experiences
- Fostering independent practice of specific skills

Teachers Know Best - Bill & Melinda Gates



ADOPTION OF DIGITAL - TEACHER ATTITUDES

Challenges in implementing mobile technology. Respondents frequently identified several challenges to implementing mobile technology, including:

- professional development and implementation support for teachers
- teacher lack of knowledge or experience
- mobile device management
- Bandwidth
- Wifi connectivity; and/or technology infrastructure
- and breakage, damage to devices, repair.

Apps most often identified as beneficial to student instruction were:

- digital textbooks (68.9%)
- creation tools (e.g., documents, multimedia presentations, images, video, audio) (54.5%),
- collaboration tools (e.g., Google Drive) (52.1%),
- student productivity tools (e.g., storage for student files, note taking, scheduling) (43.1%).

- Trend toward favorable attitudes toward technology & digital product (see notes below)
- Use insight re: lack of teacher knowledge or experience to fuel content marketing

Table 12.14
Evidence That Using Mobile Devices With Students Improves Learning

HAVE YOU FOUND THAT USING MOBILE DEVICES WITH STUDENTS:	MAKES LEARNING MORE ENGAGING & PERSONALIZED	IMPROVES STUDENT ACADEMIC PERFORMANCE
Yes	60.5%	34.2%
No	19.4%	31.1%
Don't know	20.2%	34.7%

ADOPTION OF DIGITAL - PRODUCT DEVELOPMENT

The following table shows how product development focus for many companies has continued to shift in the direction of digital over the past three years.

Table 3.7

AREA OF FOCUS (Average)	% OF PRODUCT DEVELOPMENT 2014	% OF PRODUCT DEVELOPMENT 2013	% OF PRODUCT DEVELOPMENT 2012
Digital tools or digital content	47.1%	44.1%	43.1%

Growth of digital products in education

- More education companies shifting to digital
- Driving force behind market growth
  - Rapid adoption of digital products
  - Implementation of new Common Core standards

ADOPTION OF DIGITAL - BY DELIVERY TYPE

Table 12.2
School/District Inventory Of Computing Devices

DESCRIPTION	% OF RESPONSES
We have desktops and laptops and a growing number of tablets and other mobile devices (medium tech)	58.9%
We have mostly desktops and laptops and few if any tablets and other mobile devices (low tech)	31.4%
We have few if any desktops and mostly laptops and other mobile devices (high tech)	8.7%
Don't know	1.0%

Optimize for mobile, particularly in SW

The Southwest region reported the highest average numbers of desktops, laptops, tablets, and other smart devices. At the other end of the spectrum, the West region was the laggard in terms of numbers of desktops, laptops, E-readers, and other smart devices.

Table 12.3
Average Number Of Devices By Category: District Reports

TYPE OF DEVICE	AVERAGE REPORTED UNITS
Desktop computer	972.3
Laptop computer	821.0
Tablet	474.4
Chromebook	240.8
Smartphone, iPod, other smart devices	170.9
E-book reader	62.4

Table 12.4
Computing Devices By Type

TYPE OF DEVICE	K-12 ESTIMATED TOTAL UNITS
Desktop computer	4.7 million
Laptop computer	3.9 million
Tablet	2.3 million
Chromebook	1.2 million
Smartphone, iPod, other smart devices	0.8 million
E-book reader	0.3 million
TOTAL COMPUTING DEVICES	**13.2 MILLION**

ADOPTION OF DIGITAL - INTERNET ACCESS

Children's Access to and Use of the Internet	2013	2015	
Percentage of children ages 3 to 18 who use the Internet from home			
3- and 4-year-olds	31%	39%	▲
5- to 10-year-olds	50%	54%	▲
11- to 14-year-olds	65%	65%	
15- to 18-year-olds	77%	76%	

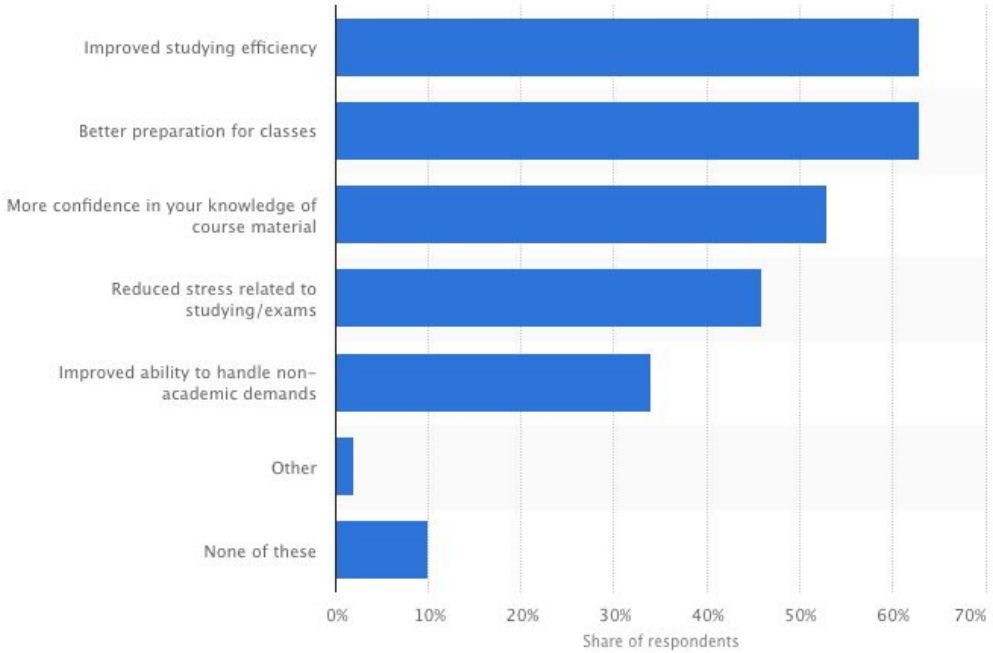
- Increase in preschool children's use of internet most notable growth (31% to 39%)
- 86% of children using Internet at home; 65% using at school

Children's Access to and Use of the Internet

In 2015, about 71 percent of children ages 3 to 18 used the Internet. Among these children, 86 percent used the Internet at home; 65 percent used it at school; 31 percent used it at someone else's home; 27 percent used it at a library, community center, or other public place; and 14 percent used it at a coffee shop or other business offering internet access. In addition, 27 percent of these children used the Internet while traveling between places.

IES: The Condition of Education: May 2018

Results of digital learning technologies usage of college students in the United States as of August 2016



DOWNLOAD SETTINGS SHARE

PNG PDF XLS PPT

DESCRIPTION SOURCE MORE INFORMATION

This statistic presents results of digital learning technologies usage of college students in the United States as of August 2016. During the survey period, 63 percent of respondents agreed that their usage of digital learning technology resulted in them being better prepared for classes.

ADOPTION OF DIGITAL - ONLINE SUPPLEMENTAL PRODUCTS

Charts below from EMR industry survey 2003-2014 to providers of supplemental products and services

- Big increase in sales of online/digital supplemental products from 41% in 2009 to 83% in 2014 (102% increase)

Table 3.1
Media Used For Delivering Supplemental Products

MEDIA	% 2014 SURVEY	% 2013 SURVEY	% 2012 SURVEY	% 2011 SURVEY	% 2010 SURVEY	% 2009 SURVEY
Print	65.2%	70.5%	67.6%	71.3%	60.3%	61.4%
Online/ digital delivery	82.6%	70.5%	68.5%	69.0%	54.5%	41.2%

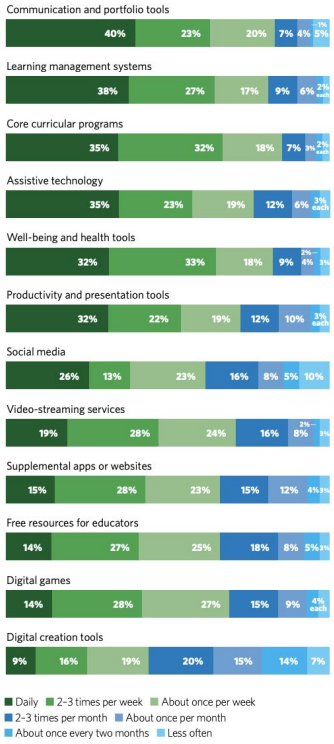
- In terms of sales derived from print vs. digital products, print still accounted for the largest amount (46.4%) in 2013, and is expected to be about the same (43.8%) in 2014. The following table shows, according to the respondents, the distribution of sales by print vs. other media in 2013 and 2014.

Table 3.2
Percentage Of Sales By Medium

PRODUCT MEDIUM	% OF SALES 2013	% OF SALES 2014
Print/traditional media	46.4%	43.8%
Digital	34.6%	37.2%
Hardware/furniture/equipment	15.2%	15.2%
Other	3.8%	3.8%

ADOPTION OF DIGITAL

FIGURE 9. Frequency of teachers' usage of classroom technology, by type

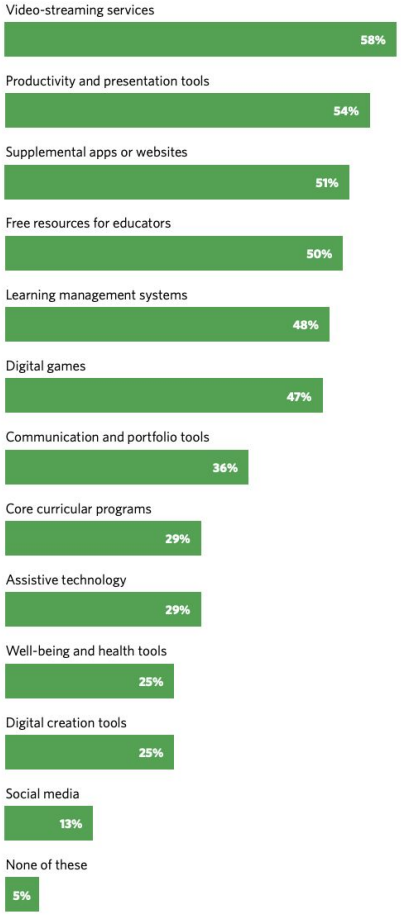


Note: Segments may not total 100% due to rounding.

Types of digital tools most commonly used also varied by grade level. Teachers of grades K–2 used several types of digital products less commonly than teachers of the other grade bands:

- Video-streaming services
  (49 percent of K–2 teachers vs. 59 percent of grade 3–5 teachers, 63 percent of grade 6–8 teachers, and 59 percent of grade 9–12 teachers)
- Productivity and presentation tools
  (33 percent of K–2 teachers vs. 51 percent of grade 3–5 teachers, 60 percent of grade 6–8 teachers, and 66 percent of grade 9–12 teachers)
- Supplemental apps or websites
  (41 percent of K–2 teachers vs. 53 percent of grade 3–5 teachers, 58 percent of grade 6–8 teachers, and 51 percent of grade 9–12 teachers)
- Learning management systems
  (28 percent of K–2 teachers vs. 51 percent of grade 3–5 teachers, 53 percent of grade 6–8 teachers, and 55 percent of grade 9–12 teachers)

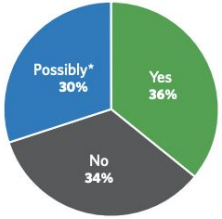
FIGURE 8. Types of digital tools teachers use in their classrooms



Common Sense Media, 2019

FIGURE 40. Teachers' usage of school- or district-provided educational technology

Has your school or district provided you with any digital products or devices that you practically never use, or have decided not to use in your classroom?

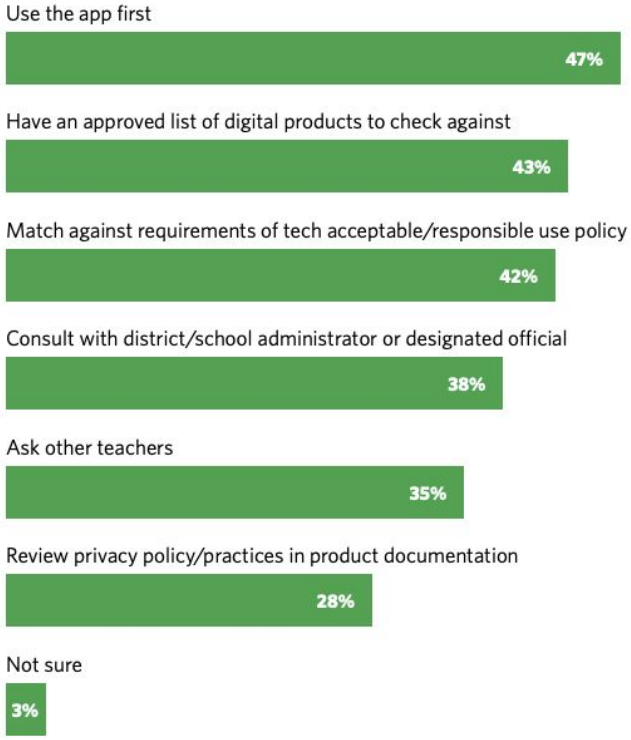


*"It's possible that my district provides digital products or devices that I never use because I might not know such products or devices exist."

TABLE 4. Teachers' reasons for not using digital product(s) or device(s) provided by their schools or districts

Percentage of teachers who thought the product was ...	
Not relevant to students' learning needs	39%
Not effective for engaging students	29%
Not effective for supporting students' skills/knowledge	23%
Too hard to use	19%
Too slow and/or unreliable	18%
Out of date	16%
Other (net)	17%

FIGURE 37. Strategies teachers use to determine whether digital products are safe to use with students



Common Sense Media, 2019

Adoption of Video

ADOPTION OF VIDEO - THE USE OF INSTRUCTIONAL VIDEO

KEY FINDINGS FROM STUDY OF 73 TEACHERS

- 85% of K-12 educators who responded used instructional video for educational purposes
  - 48% of teachers reported never creating their own videos; 23% - rarely; 12% - often
- Teacher usage:
  - Frequency: 5% - daily; 29% - once a week; 20% - once a month; 16% - once a quarter; 11% once a semester
  - Number of different video titles: 31% - 5 video titles; 27% 6-10 video titles; 24% - 30 titles
- Types of videos used:
  - 12 - screen capture; 15 - lecture; 42 - demonstration; 19 - other
- Training to use instructional video:
  - 21% - yes; 49% - no
- Flipped classrooms (see notes below)
  - 92% - not using videos for flipped classrooms; 8% - using for flipped
- Online learning (see notes below)
  - 77% not using videos for online learning; 13% - using for online learning

IUP: THe Use of Instructional Video in K-12 Classrooms (2015)

ADOPTION OF VIDEO - APPLICATIONS IN EDUCATION

Basic Instruction (pg. 15)	In foreign language classes, history and geography lessons where students can bring a subject to life, stimulate their ability to recall facts and events, and experience places they wouldn't otherwise experience.
Advanced Instruction (pg. 15)	In science subjects like physics, mathematics, astronomy and biology allowing students to expand their understanding of complex concepts by strengthening the links between abstract ideas and practical applications.
Classroom Enrichment (pg. 15)	Video gives students the opportunity to travel to remote places outside the classroom walls without leaving school.
Accelerated Learning (pg. 16)	One-way streaming blended with other online methods of communicating is one of several ways of ensuring that learners can take the college-level courses they need.
Distance Education (pg. 16)	To make courses, lectures, and faculty accessible to populations in remote areas and also to students with disabilities or with physical impairments.
Global Student Collaboration (pg. 16)	Video technologies can help students connect with peers located in different campuses and in different countries so that they can interact with different cultures, exchanging information and learning from each other.
Communications (pg. 17)	Video can also be used to stream instructional/informational or entertainment related content at campus public areas such as cafeterias, auditoriums, and stadiums.
Professional Development (pg. 17)	Using video technologies has proven helpful for primary and secondary in training teachers **when sharing resources, exchanging ideas,** recording and evaluating themselves, and taking full advantage of professional development opportunities they might otherwise miss.

Cisco: The Impact of Broadcast and Streaming Video in Education (2012)

ADOPTION OF VIDEO - THE IMPACT OF VIDEO

Grades & performance	On-demand video has been shown to impact grades and test performance through a large number of studies conducted by colleges and universities. Some studies have led to the conclusion that students who engage in [viewing streaming video] outperform peers who are in a traditional face-to-face classroom.
School Readiness	Educational television has been shown to have a positive impact on school readiness, including letter and number recognition. Positive relationships have been found between childhood viewing of educational television and cognitive performance at both preschooler and college levels.
Overall academic development	Educational TV can have positive effects on the intellectual and academic development of children. Similarly, many studies are beginning to confirm that blended learning—the combination of face-to-face and online instruction—can be equal to or superior to either face-to-face or online-only programs. Many blended learning programs include on-demand or real-time video as program components
Workforce preparation	Video content and video literacy—both the understanding of how to take full advantage of video as a communications tool and knowing how to use technology itself—are considered a core competency when students leave university. Video can better prepare students for the workforce because it develops skills such as creativity, sociability, exposure to the spotlight, and civic responsibility, as well as qualities like self-esteem and cultural understanding.
Student motivation	When students are given the opportunity to create digital material for classroom use, the feeling of empowerment, ownership, and sense of purpose is much higher. This in turns enhances the students' motivation toward a particular subject and also contributes to the development of additional skills such as innovation, creativity, leadership, social interaction, and project management.
Learner engagement	An essential finding across multiple studies reviewed in this paper shows that on-demand streaming content increases student engagement. Individual control over the pace of learning enables students to review segments repeatedly of a lesson and feel that they are learning more effectively.
Learner conceptuality	Cross-cultural understanding can also be enhanced through video because of the "reality" or "conceptuality" provided by it. This can often decrease isolation, increase cultural awareness, and even help minimize xenophobia.
Digital and multimedia literacy	Multimedia helps foster other 21st century skills such as critical thinking, problem solving, communication, and collaboration. In parallel, increasing use of video by students is bringing them closer to media and IT technologies, demystifying and placing them in the hands of learners as tools for content creation.

Cisco: The Impact of Broadcast and Streaming Video in Education (2012)

ADOPTION OF VIDEO - PEDAGOGICAL IMPACTS

Although the impact of video and multimedia technologies in educational outcomes is a field of ongoing research, the pedagogical impact of video can be summarized by three key concepts:

1) **Interactivity with content** (the learner relates to visual content, whether verbally, by note taking or thinking, or by applying concepts)
2) **Engagement** (the learner connects to the visual content, becoming drawn in by video, whether on-demand or real-time)
3) **Knowledge transfer and memory** (the learner may remember and retain concepts better than with other instructional media)

Because video combines many kinds of data (images, motion, sounds, text) in a complementary fashion, learning can be adjusted more easily than with other tools to the diverse learning styles and individual learning pace of students. With video, the learner has more control over the information he receives and an additional opportunity for deeper learning by being able to stop, rewind, fast-forward, and replay content as many times as needed.

Cisco: The Impact of Broadcast and Streaming Video in Education (2012)

ADOPTION OF VIDEO - FINDINGS OF STUDIES

Table 4. Some Quantitative Studies Related to Performance Improvements

Source: Wainhouse Research

Year Published	Institution	Key Findings
2006	Clemson University School of Education,[29] South Carolina, United States	87 percent of students using lecture capture felt that it was a valuable part of course materials.
2009	Charlotte-Mecklenburg School District, North Carolina, United States	Composite retest scores on North Carolina's science end-of-year exam for grades 5 and 8 increased by 44 percent when students used streaming video.
2010	University of Massachusetts, Lowell, Massachusetts, United States	91 percent of students using lecture capture felt it helped them learn course material.
2010	University of Colorado at Boulder,[29] Colorado, United States – Undergraduates	91 percent were confident or somewhat confident that watching lecture capture improved their learning in class.
2011	Bergen Community College, Paramus, New Jersey, United States	10 percent jump in average grades in both biology and CAD/CAM courses using lecture capture.

Cisco: The Impact of Broadcast and Streaming Video in Education (2012)

ADOPTION OF VIDEO - EFFICACY OF INSTRUCTIONAL VIDEOS

KEY INSIGHTS

- Research shows that [instructional videos are] not only preferred by students but also leads to deeper learning (Mayer, 2009; Ibrahim, 2012; Smith & Smith 2012)
- Theory of multimedia learning
  - Three assumptions that correspond to the way people learn:
    i. Dual channels exist in the brain which allow individuals to process ino through both auditory and visual
    ii. Working memory has limited capacity which can be overloaded and prevent learning from occurring
    iii. Active processing integrates visual and verbal information with prior knowledge and commits learning to long-term memory
- Study of 856 pre-calculus students in their first year of college showed:
  - 81% who used videos agreed or strongly agreed that the videos led them to a better understanding of content
  - 91% agreed or strongly agreed that the videos were easy to understand
  - 73% agreed or strongly agreed that videos were preferred over textbook

IUP: THe Use of Instructional Video in K-12 Classrooms (2015)

ADOPTION OF VIDEO -DRIVERS & OBSTACLES

DRIVERS	
Pedagogical (see pg. 9)	- Greater understanding that students learn differently - Need for greater emphasis on globalization/competitive workers skills - Need for critical problem-solving skills
Technological (see pg. 9)	- Changes in access, devices, and behaviors - Increased access to the internet - Greater consumption of online videos - Greater numbers of mobile devices
Social	- New generations of technology-savvy teachers - Learners' proficiency with technology and affinity for video

OBSTACLES	
Technological	- Technology access (bandwidth in rural areas) - Fidelity of implementation - Equipment failures and reliability
Legislative	- Requirements for special-need learners - Weak science and technology policies - Deficits in government funding
Behavioral	- Attitudes, expertise, and pre-conceived ideas - Teachers' poor proficiency with technology - Extra time needed for class preparation - Faculty resistance (IP and digital rights issues)
Resource-Based	- Low quality of high-educational TV programs - Poor PD/technical support

Cisco: The Impact of Broadcast and Streaming Video in Education (2012)

ADOPTION OF VIDEO - EDUCATOR ATTITUDES

Digital Literacy

- 95% of respondents view video as an important part of digital literacy, especially given concerns about “fake news”
- 97% feel it’s important to raise the level of digital and video literacy among teachers and students
- The gap in perceived digital literacy between teachers and students appears to be closing

Teachers using video

- 26% of respondents reported that more than half of their teachers regularly use video (up from 20%)
  - In K-12, 56% report majority of teachers using video
  - In continuing education, 20% have more than ¾ of faculty using video
  - Community colleges show lowest rate of video

ROI for video

- 92% believe video increases student satisfaction with their learning experience
- Other areas of positive impact
  - Increasing student achievement (84%)
  - Increasing teacher satisfaction (83%)
  - Increasing educator collaboration and PD (83%)
  - Making onboarding go more smoothly (80%)

Purposes for Video

- Flipped classrooms has shown slow and steady gains since 2014 (from 51% to 60%)

ADOPTION OF VIDEO - USAGE

Table 8.35
New Technologies Of Greatest Interest, Adoption vs. Open Territory States

CHOOSE SAME PROGRAM AGAIN?	TOTAL	OPEN	ADOPTION
Online learning games	48.5%	44.8%	51.3%
Internet enabled mobile and handheld devices (Ipads, tablets, Iphones, etc.)	27.6%	27.4%	27.6%
Collaborative software enabling students to learn together	27.0%	28.9%	25.5%
Social media (videos, blogs, wikis, and social networks)	11.9%	13.0%	10.7%

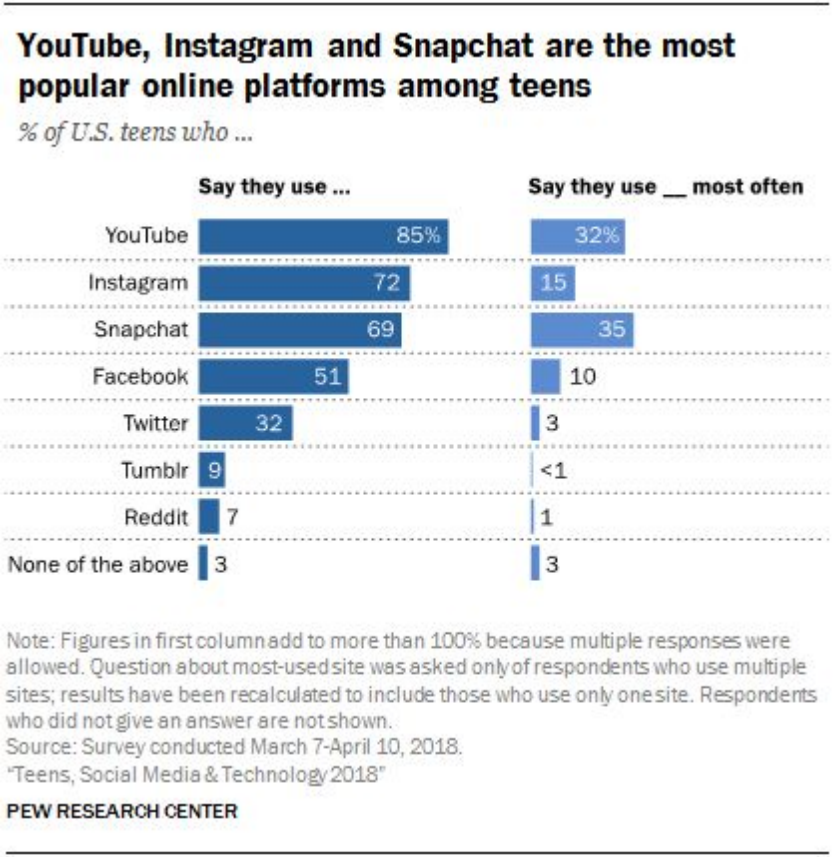
Table 9.18
Types Of Materials Used On A Frequent Basis - Digital Resources

TYPE OF MATERIAL	% OF SAMPLE 2012	% OF SAMPLE 2009
Web sites/online services	79.7%	79.0%
Interactive whiteboard	58.4%	- -
Video-via online delivery	41.6%	35.8%
Software	38.1%	39.4%
Cable TV/Satellite dish	7.4%	8.7%

ADOPTION OF VIDEO

- 78% of people watch online videos every week, and 55% view online videos every day. (HubSpot)
- By 2020, online videos will make up more than 80% of all consumer internet traffic (85% in the US). (Cisco)
- YouTube is the second most trafficked site, after Google. (Alexa)
- One minute of video is worth 1.8 million words. (Forrester Research)
- Users view more than 500 million hours of video each day on YouTube. (Business Insider)
- 59% of executives say they would rather watch a video than read text. (Wordstream)
- 55% of people pay close attention when consuming videos — more than all other types of content. (HubSpot)
- In the past 30 days, more online video content has been uploaded to the web than the past 30 years of TV content. (Blue Corona)
- 51% of all video plays are on mobile devices. (Adelie Studios)
- Viewers retain 95% of a message when they watch it in a video, compared to 10% when reading it in text. (Wirebuzz)

ADOPTION OF VIDEO



Students aged 8-18 consume 6-9 hours of media a day.

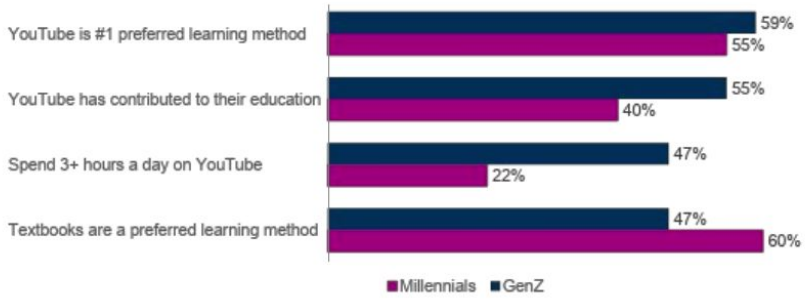
- Common Sense Census (see this article)

[Pew Research: Teens, Social Media, and Technology]

ADOPTION OF VIDEO - Students

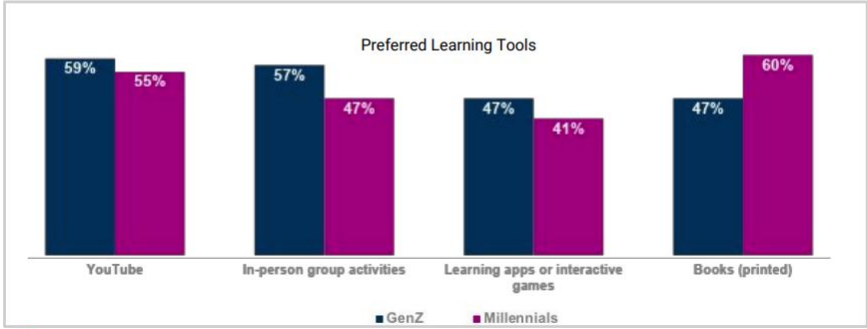
YouTube takes a significant role in GenZ learning

While Millennials see value in YouTube as well, they are more likely than GenZ to prefer traditional textbooks to supplement their learning.



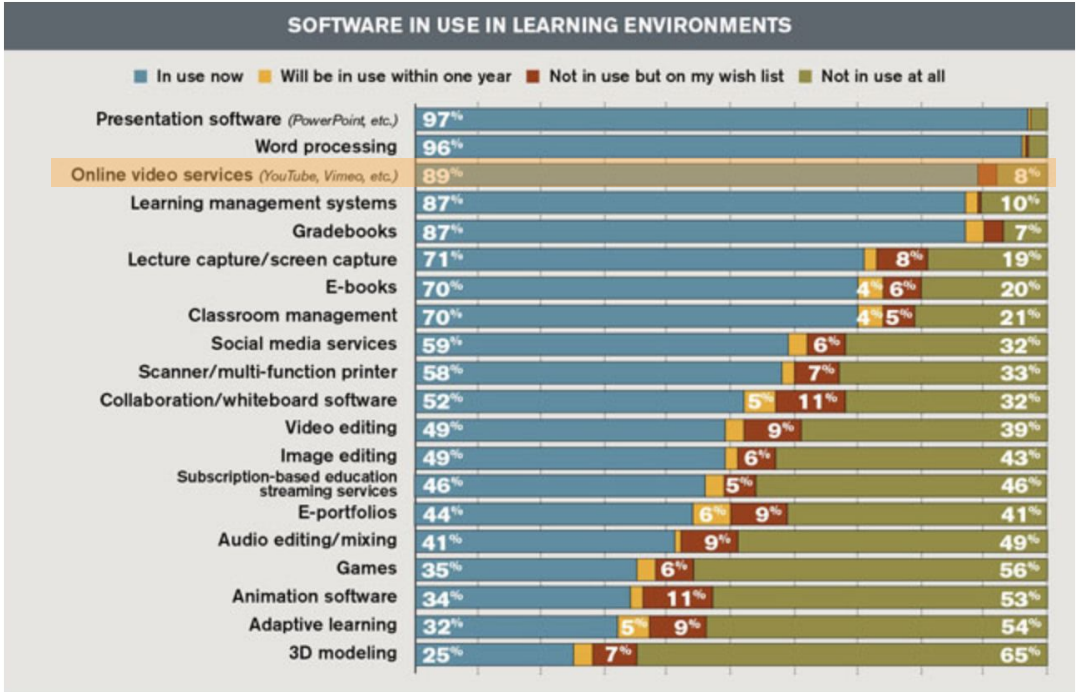
Preferences for YouTube, apps & videos translates to preferred ways of learning

GenZ is more likely to prefer YouTube or Apps to Millennials, who prefer printed books for learning.



Pearson 2018: The Next Generation of Learners

ADOPTION OF VIDEO - Higher Ed



- 89% of US higher ed faculty us online video services (YouTube, Vimeo)
- Only 8% of faculty do NOT use these services
- Video is the 3rd most popular software type in use in learning environments after word processing tools and presentation software

Faculty Wish List for the Classroom

Market Trends

Teaching Methodologies

TEACHING METHODOLOGIES: BLENDED LEARNING

From MDR EdNet Survey (2010)

FUNDING FOR ONLINE & BLENDED

- 92% of districts fund through their own budgets
- 25% of districts get state funding
- 21% get Federal “formula” funding
- Other sources: federal competitive grants, local funding, and tuition

PRIMARY CHALLENGES ADDRESSED BY ONLINE & BLENDED LEARNING

- 79% - providing an alternative to students struggling in traditional classes
- 66% providing access to courses otherwise not available
- 66% - providing time and place flexibility to students
- 66% - delivering personalized learning experiences

MEASURING QUALITY OF ONLINE PROGRAM

- 91% - engagement in the system
- 89% - demonstrating significant academic progress
- 88% - high attendance and participation
- 67% - scoring at or above other similar students in end-of-year tests
- 65% - passing the course

TOP ATTRIBUTES OF SUCCESS IN IMPLEMENTING ONLINE:

- 91% - Offering a rigorous and engaging curriculum
- 89% - adequate reporting tools and tracking student progress
- 87% - setting clear expectations for student responsibilities in taking online courses
- 86% - timely teacher intervention when students are struggling

FLIPPED CLASSROOM

GENERAL

- Instructional videos are used extensively when teachers employ the flipped classroom

BENEFITS

- Allows accelerated students to continue learning and growing; allows motivated, high-achieving students to progress without being held back by the constraints of the traditional classroom
- Also benefits students who are struggling

IUP: THe Use of Instructional Video in K-12 Classrooms (2015)

Interactive Whiteboards & LMSs

INTERACTIVE WHITEBOARDS

According to EMR's latest educator survey data on IWB sales, 2013-14 sales of interactive whiteboards increased 71.5% (23.8% per year) compared to EMR's 2011-12 survey results. That makes the IWB market niche, along with the online/digital content niche, a very robust hot spot within the overall K-12 school market.

Table 13.4
IWB Installed Brands/Market Shares

IWB BRAND	% OF RESPONSES 2011	% OF RESPONSES 2014	SHARE 2014*
SMART Board/SMART Technologies	70.5%	68.0%	58.6%
ACTIVBoard/Promethean	28.7%	29.5%	25.4%
Mimio/Mimio Interactive Teaching Technologies	6.7%	5.4%	4.7%
Interwrite/Interwrite Learning/eInstruction	5.2%	2.5%	2.2%
PolyVision/Eno/PolyVision	3.5%	3.3%	2.8%
StarBoard/StarBoard Group	2.3%	2.5%	2.2%
Ebeam/Luidia	0.4%	1.3%	1.1%
Epson/Epson Brightlink	NA	0.9%	0.8%
Numonics/Numonics Corporation	NA	0.4%	0.3%
Vivitek/Vivitek Qumi Projector	NA	0.2%	0.16%
Hitachi	NA	0.2%	0.16%
Mobi/Mobi View/Mobi Learner	NA	0.2%	0.16%
All Other (unspecified)	1.7%	1.3%	1.1%

* After adjusting for multiple responses.

INTERACTIVE WHITEBOARDS

Table 13.20--Frequent IWB Use By Subject: Grades 3-5

SUBJECT AREA	% FREQUENT USE
Mathematics	86.8%
English/Language Arts/Literature	81.6%
Science/Health/Nutrition	69.0%
Social Studies/History	66.7%
Computers	24.1%
ELL	11.5%
Art	11.5%
Religion	9.8%
Music/Dance/Theater	6.3%
Guidance/Prevention	7.5%
Foreign Language	5.7%
Career/Technical Education	2.3%

Table 13.21--Frequent IWB Use By Subject: Grades 6-8

SUBJECT AREA	% FREQUENT USE
Mathematics	47.5%
English/Language Arts/Literature	37.3%
Social Studies/History	33.5%
Science/Health/Nutrition	32.3%
Computers	7.0%
Religion	6.3%
Art	5.7%
ELL	5.1%
Foreign Language	5.1%
Guidance/Prevention	3.8%
Music/Dance/Theater	2.5%
Career/Technical Education	1.9%

Table 13.22
Frequent IWB Use By Subject: Grades 9-12

SUBJECT AREA	% FREQUENT USE
Mathematics	40.4%
Science/Health/Nutrition	30.9%
English/Language Arts/Literature	28.7%
Social Studies/History	27.9%
Foreign Language	6.6%
Computers	4.4%
Art	4.4%
Career/Technical Education	4.4%
ELL	2.2%
Guidance/Prevention	1.5%
Religion	1.5%

Table 8.21
Interactive Whiteboard Usage, Comparison Of Four Large States

PERCENTAGE OF SCIENCE CLASS TIME USING IWB?	CA	TX	FL	NY
Class time	6.0%	25.2%	22.4%	40.8%

Table 8.34
Percentage Of Class Time Spent Using IWB, Comparison Of Four Large States

AVERAGE % OF TIME USING IWB?	CA	TX	FL	NY
Mathematics class time	17.5%	26.1%	43.5%	33.4%

Table 9.23
Interactive Whiteboard Use By Region

REGION	AMOUNT OF CLASS TIME FOR IWB
Southeast	30.6%
Northeast	29.5%
Midwest	25.5%
Southwest	24.8%
West	11.5%
AVERAGE=25.1%	- -

Web Sites for Student and Teacher Use

The respondents were asked both for the names of web sites they use or recommend for student use, and for teacher use. About 72% of the sample wrote in at least one site. The result was an eclectic mix of free and commercial sites. The following two tables show the sites identified by at least 1% of the Science educators who responded.

LMSs

The respondents were asked if they were using any type of “learning management system” (LMS) to help with the teaching, testing, record-keeping, etc. in their school or district. Five years ago, EMR’s survey results indicated the clear majority (67.2%) were not currently using a LMS. The 2013 survey results are now more evenly split, with 51.0% saying no LMS in use, and 49.0% saying yes, we do have a LMS. **So that is a positive movement of 16 points in the direction of LMS use compared to EMR’s 2008 survey findings.**

Sub-groups most likely to say “yes” to LMS usage included district superintendents and curriculum supervisors (56.7%), **medium [2,500-10,000] districts (53.4%), suburban areas(52.5%), and those in the Southeast (57.3%) and West (55.3%) regions.**

Table 15.14
Learning Management System Products In Use

SOURCE	% OF THOSE USING LMS
PowerSchool (Pearson)	6.3%
Our own, or teacher made, or locally developed	5.7%
Measures of Academic Progress/MAP (NWEA)	5.7%
Classworks (Curriculum Advantage)	5.0%
Performance Series/Achievement Series (Scantron)	4.4%
Eduphoria/Eduphoria Aware/Aware (eduphoria! Inc.)	3.8%
Renaissance Learning/STAR	3.8%
AIMSweb (Pearson)	3.1%
Data Director/HMH or Riverside Data Director	3.1%
Discovery Education	
GlobalScholar (Scantron)	
Compass Learning/Odyssey	
Skyward	
Thinkgate	
The Learning Institute/TLI	
ELS/EZ Assessment/EZ Test Tracker/EZ Lesson Leadership Solutions)	
Illuminate (Illuminate Educati	
Infinite Campus (Infinite Campus	
Performance Matters	
SchoolCity/Synced Solutions (Action Lea	
Training & Education in the 21st Century/Case 21/Case Assessment (TE21, Inc.)	1.9%
Alpine Achievement System	1.3%
Galileo/ATI Galileo (Assessment Technology Inc.)	1.3%
MyLearningPlan/Oasys (My Learning Plan Inc.)	1.3%
Read 180 (Scholastic)	1.3%
Waterford/Waterford Early Learning	1.3%

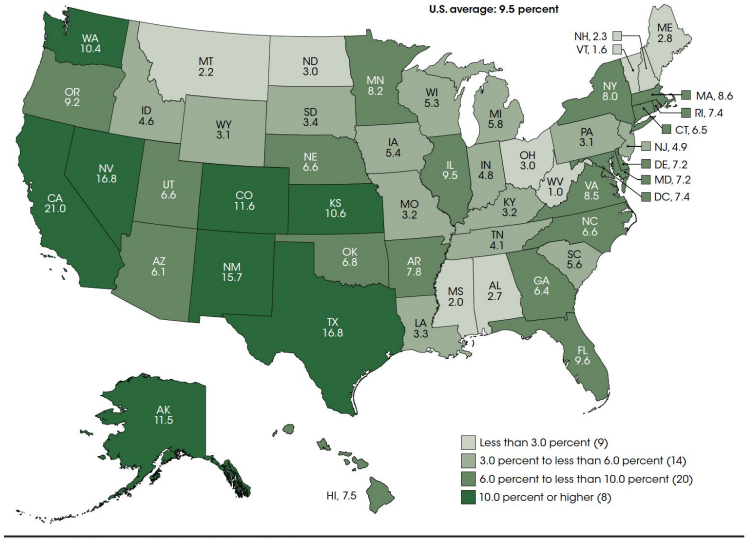
- Growth of LMS
- Note demographic of most likely to use LMS:
  - Medium districts
  - Suburban areas
  - SE and West regions

Special Markets

SPECIAL MARKETS - ELL

- Focus on these states for ELL targeting:
  - CA, TX, AL, CO, KS, NE, NM, WA

Figure 1. Percentage of public school students who were English language learners, by state: Fall 2015



NOTE: Categorizations are based on unrounded percentages.
SOURCE: U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD), "Local Education Agency Universe Survey," 2015–16. See *Digest of Education Statistics 2017*, table 204.20.

IES: The Condition of Education: May 2018

SIMBA: The Complete K-12 Report: Market Facts & Segment Analysis 2015

When asked to describe the bulk of the instructional materials they use for ELLs, the educators' responses were split between "same core materials provided by the district for regular classrooms and make adaptations for ELLs" (33.3%), "separate ESL/ELL instructional program which we buy from a vendor" (30.5%), and **"same core materials plus kits or other supplements designed for ELLs" (26.4%).** Another 18.3% said they have a "separate ESL/ELL instructional program which we developed ourselves". Only 8.1% said they use "same core materials provided by the district for regular classrooms without alteration".

When asked what could be done to make the most difficult subject area textbooks more usable for ELLs. "provide audio/video supplements" was #1 response

Market Trends

SPECIAL MARKETS - ECE

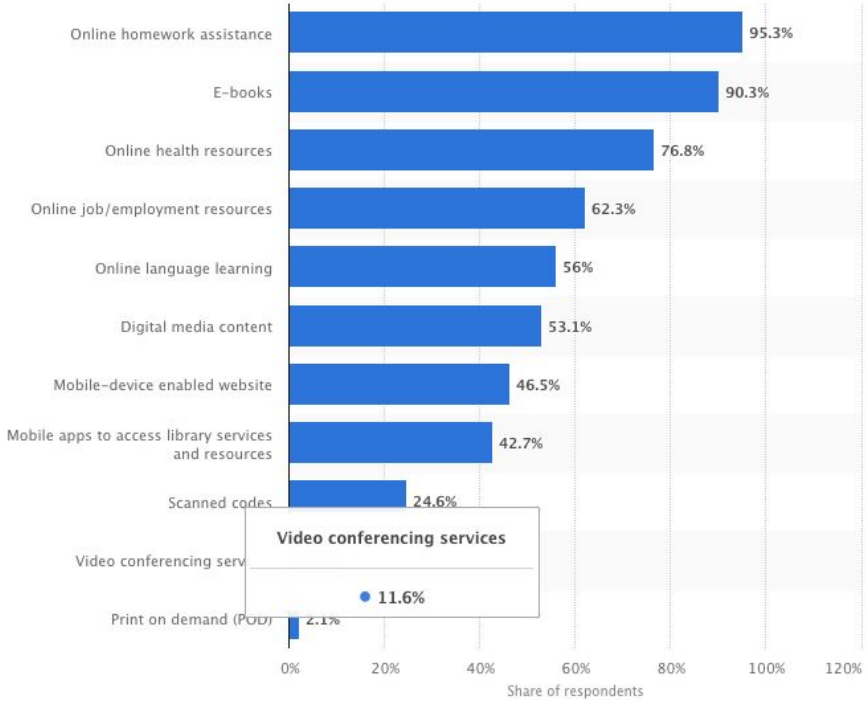
(78.0%), in sixth place. One noticeable shift in educators' preferences is "Internet/Web Sites" in the eighth position. This resource was barely mentioned eight years ago, and now it is used frequently by 74.1% of the respondents.

When the respondents were asked how frequently they use educational software with their children, the largest number (44.5%) said they do so on a daily basis (down slightly from 47.9% in 2002). Another 35.2% of the overall sample indicated that they use software at least weekly, 9.1% said they use monthly, and 11.2% said they do not use at all. Thus 88.8% of the overall sample of early childhood educators are using software with their children (up from 84.8% eight years ago), and the vast majority (79.7%) of those do so at least on a weekly basis.

Generally speaking, software usage decreases with increasing grade level. However, at the Early Childhood level, usage is above 80% across all of the grades Pre-K - 2. Another positive factor for the Early Childhood software market is 82.1% of the overall sample are using software materials in the classroom (up from 69.0% back in 1997). This finding implies that the majority of Early Childhood classrooms are equipped with computers. W

- ECE *might* be worth targeting if we have the content to support

Public library technology services and resources available for patrons in the United States as of November 2014



DOWNLOAD SETTINGS SHARE

PNG + PDF + XLS + PPT +

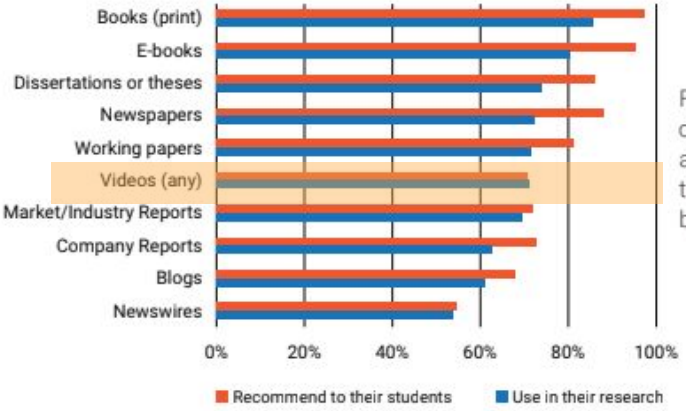
DESCRIPTION SOURCE MORE INFORMATION

This statistic presents the most popular public library technology services and resources available for patrons in the United States as of November 2014. During the survey period it was found that 95.3 percent of U.S. public libraries offered online homework assistance. Only 2.1 percent of libraries were able to offer patrons print-on-demand services.

SPECIAL MARKETS - HIGHER ED

Nearly half of all ProQuest platform usage in 2016 was content other than scholarly journals. ProQuest's 2017 survey provides additional insight across a spectrum of content, including print and ebooks. Every content type included in the survey was used by more than half of the respondents. An additional insight: **faculty recommend an even broader set of content types to their students than they use themselves, introducing students to the value content diversity brings to their work.**

Which of the following types of information do you use in your research? Which do you recommend to your students?

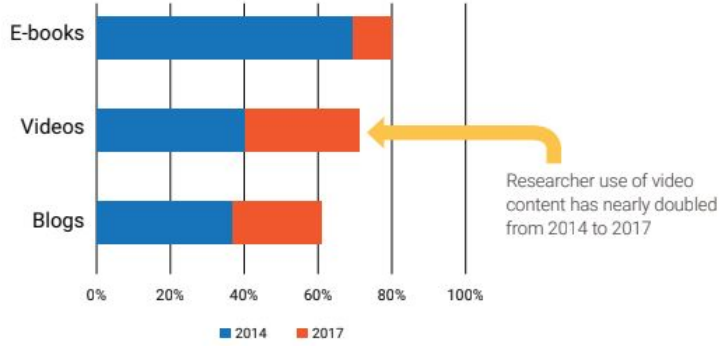


Faculty use a rich mix of content in their work and they encourage their students to stretch beyond journals.

Video has become essential

In the two years between ProQuest's surveys, videos have made the most dramatic climb in popularity among researchers. In 2015, only 39% of respondents were using video in their research. In 2017, use has climbed to 71%, confirming the anecdotal evidence we've all seen.

Not surprisingly, the other major changes were also related to the impact of relatively new technology: ebooks climbed from 69% to 80% of respondents using them. And blogs increased from 37% to 61% of respondents citing use of them. Further, the most significant decline was in the use of print books, which has dropped from 95% to 83% of researchers citing their use.



Research and Teaching Rely on Content Diversity - Proquest

Market Trends

Policy

POLICY

EU Directive on Copyright (Articles 11 &13) - source

- Articles 11 & 13 puts more responsibility on websites such as YouTube, Facebook, and Twitter to make sure that copyrighted material isn't being illegally shared on their platforms (shifts responsibility from copyright holders to major platforms)

508 Compliance (need info)

What Is Article 13 - Wired

CA NGSS

- Twig, Amplify, Discovery and National Geo all recommended (at different levels) by the State Board of Education in California as part of their new NGSS standards.

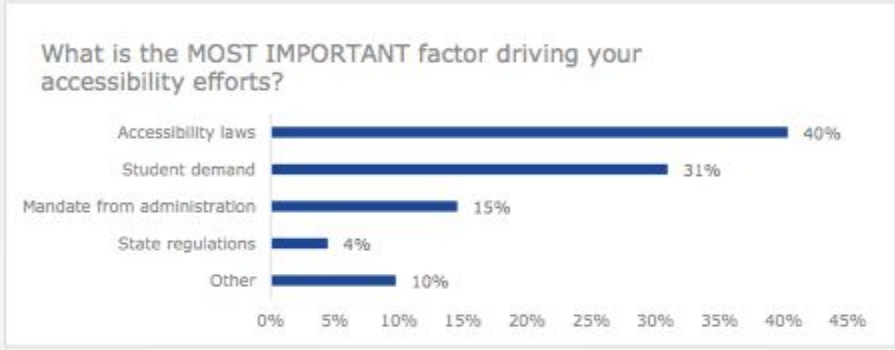
Other Trending Topics/Interests

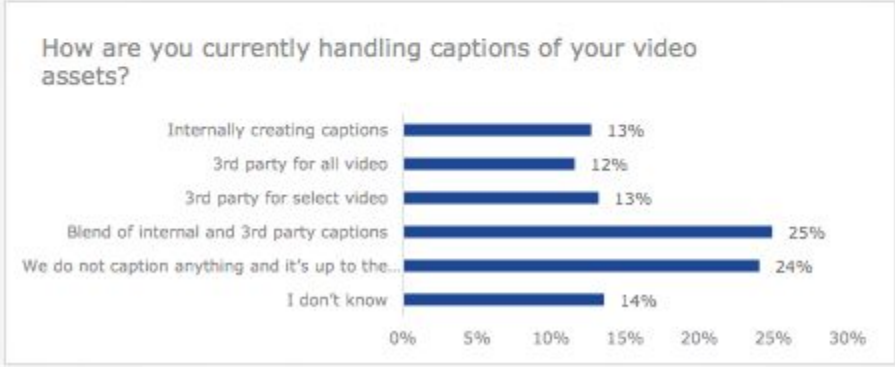
ACCESSIBILITY

Accessibility has become an increasingly important topic for educational institutions in recent years. The tightening and defining of accessibility laws is the largest factor for the most respondents in their accessibility efforts, at 40%. However, student demand is also a major factor, with 31% of respondents naming it as the chief driver of accessibility efforts on their campus.

Once a school starts to try to make video more accessible, there is even less of a consensus on how to do so. A quarter of respondents are using a blend of third party captioning services and internally created captions. Nearly another quarter put the full responsibility for providing any captions on the video's creator, if captions prove to be necessary.

Accessibility laws are driving captioning, but no consensus has emerged on how to do so





State of Video in Education 2018

Kaltura: State of Video 2018

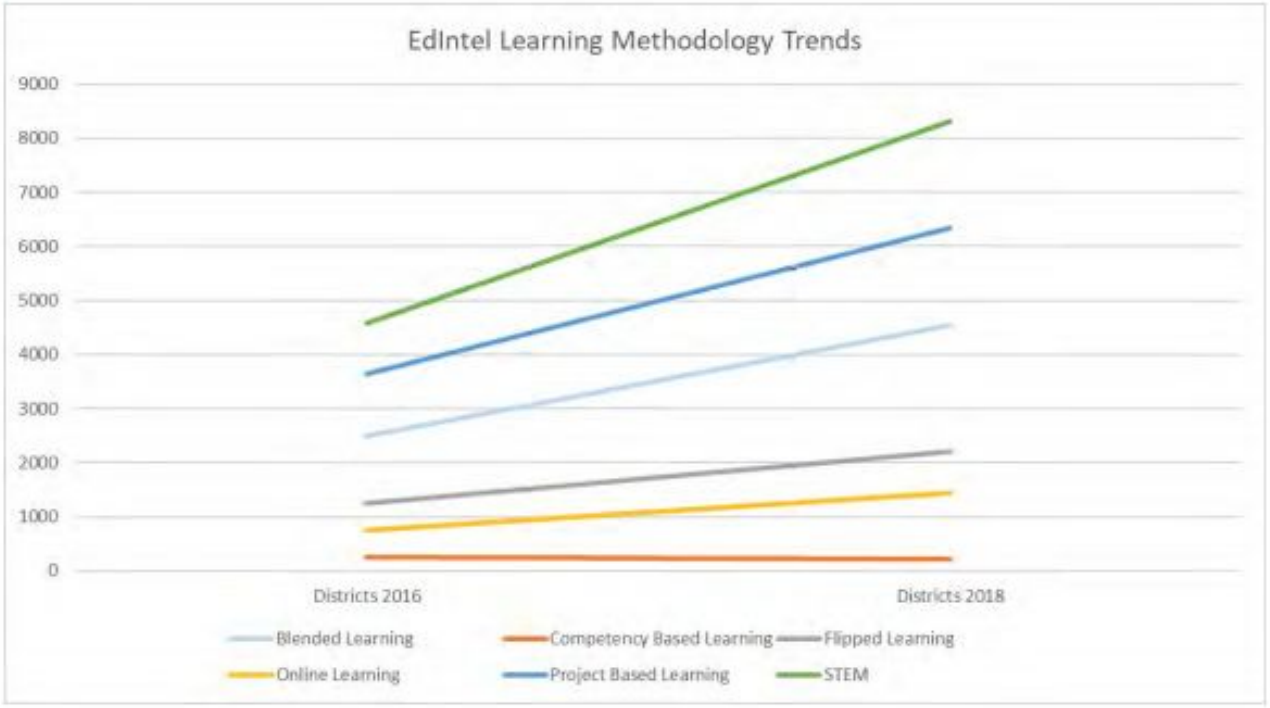
TRENDS - STEM, PBL, and BLENDED

INCREASE

Lots of STEM, Blended & PBL talk, and it's growing.

KNOW YOUR BUSINESS

Moderate, consistent growth in Online and Flipped. How do you fit in with these approaches to learning?



COMPETITIVE LANDSCAPE

VIDEO PLATFORMS

Table 9.24
Web Sites Used/Recommended For Student Use

SITE NAME	% OF RESPONSES
Discovery Education/United Streaming	16.9%
BrainPop	13.1%
NASA	8.1%
PHET.Colorado.edu	6.5%
PBS or NOVA	6.0%
CellsAlive.com	4.0%
Explore Learning/Gizmos	4.0%
National Geographic	4.0%
KhanAcademy.org	3.8%
ScienceSpot.net	3.3%
YouTube	3.3%
BiologyCorner.com	2.8%
Google	2.8%
U.S. Geological Survey (USGS.gov)	2.5%
Quia.com	2.3%
Science Daily (ScienceDaily.com)	2.3%
BiologyJunction.com	2.0%
Edheads	2.0%
Nature.com	1.0%
Prentice Hall	1.0%
Weather.com	1.0%

Table 9.25
Web Sites Used/Recommended For Teacher Resources

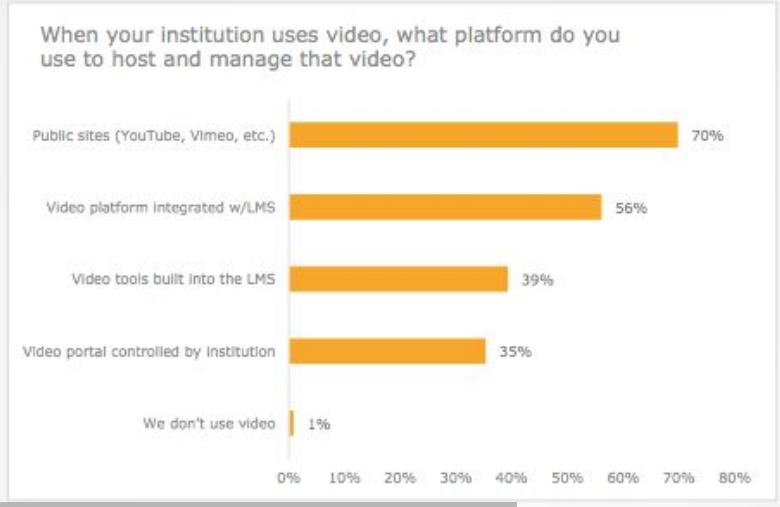
SITE NAME	% OF RESPONSES
Discovery Education or United Streaming	22.3%
ScienceSpot.net	9.0%
BrainPop	7.1%
PBS or NOVA	7.1%
BiologyCorner.com	6.0%
NASA	5.7%
YouTube	5.2%
PHET.Colorado.edu	4.9%
TeacherTube.com	3.8%
BiologyJunction.com	3.5%
KhanAcademy.org	3.5%
Google	3.3%
National Geographic	3.0%
National Science Teachers Association (NSTA.org)	3.0%
CellsAlive.com	2.7%
Explore Learning/Gizmos	2.4%
SMART Exchange (SmartTech.com)	2.4%
U.S. Geological Survey (USGS.gov)	1.6%
Nature.com	1.4%
Glencoe	1.1%
HHMI or Howard Hughes Medical Institute (BioInteractive.org)	1.1%
Quia.com	1.1%
SteveSpanglerScience.com	

VIDEO PLATFORMS

Video platforms

- "The majority of institutions are using publicly available sites such as YouTube of Vimeo to host at least part of their video. Such sites are easy, familiar, convenient, and free. On the other hand, they pose a number of concerns regarding security, privacy, accessibility, control, and branding. So it's unsurprising that many of them use additional methods-only 17% rely on these sites alone."
  - **66% of respondents are using more than one way to host and manage video**

More than half of surveyed institutions using more than one way to host/manage video



Why Not Just Use YouTube? (see this post)

- Send students out of the system
- Fair use issues
- No control over other content
- Limited enrichment
- Limited security
- Accessibility
- Limited player customization

"Which is not to say that distributing to YouTube and Facebook is a bad plan—just that it shouldn't be your only strategy."

Kaltura: State of Video 2018

COMPETITOR UPDATES

YouTube

- 10/22/18 - YouTube investing $20 million in educational video (source)

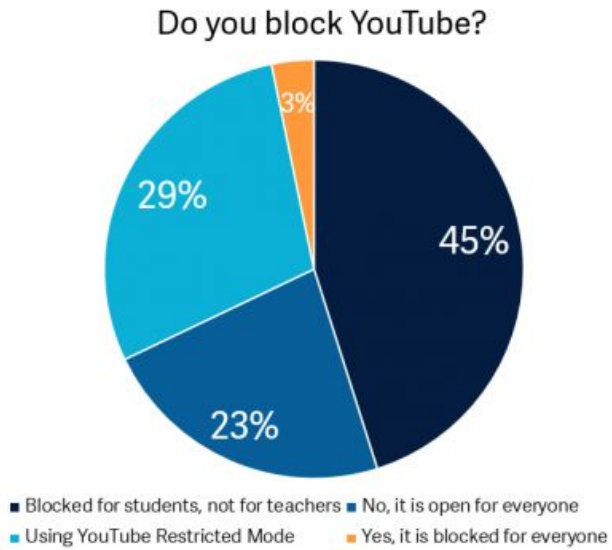
YOUTUBE

Recently, we asked our community of customers this big question: What new feature would you like to see from Lightspeed? Here's a sample of the responses we got:

> "A way to filter YouTube content to allow appropriate videos/channels without allowing everything." —Valerie Wilson, Network Software Analyst, Klein Independent School District

> "A better solution for YouTube. We need to block students, but there are times we would like them to be able to get to specific things." —Terri Periner, Tech Coordinator, Transfiguration Catholic School

We also asked our community about their policies for allowing YouTube in their districts. Here's what you told us:




With over 50% of U.S. schools using our services, we have deep-rooted partnerships and a record of success impacting teaching and learning.
DiscoveryEducation.com/Streaming
1-800-323-9084

PRICING - ALL

Organization	*Average student cost per year*	*Average teacher cost per year if available*	*Average school cost per year if available*	*Average district cost per year if available*	*Age range catered to*	*Market penetration*
Brightstorm	$6.99 *discounted for larger number of students*	$179.88 *discount for longer subscription*			Grade 6-12	12,000,000 users 120 countries
ClickView	$1.50 *plus school fee*		$540 *plus student price*		K12, Higher Ed	300,000 educators UK and Australia
Cosmeo	$3.98	$119.40			K12	
Discovery Education	$1.17		$875	$875 per school *discounts with greater number of schools*	K12	50% of US schools
InfoBase Learning Classroom Video on Demand	From $1.73				K12, Higher Ed	
Kids Know It Network	$3	Free with ads *$120.00 for up to 40 students*	Free with ads $200.00 for first 100 students *additional $50.00 for each 100 students after that*		K-6	
Learn 360	$0.37 *discount for continuing subscription*			$682.50 per building *discounts for continuing subscription*	K12	22M students 27,000 schools in the USA and Canada
Neo K12	$1 per student *discount for larger number of students*	From $30 *depending on number of students*			K12	500,000 educators USA
Safari Montage	From $2.27 *depending on package chosen*		From $1250 *depending on package chosen + Cost of Hardware between $20 - $40K per building*		K12	
		Free with ads $119.64				

PRICING - DISCOVERY EDUCATION

2. Select Products and Services (required)

Check	Products and Services	Grades K-8 (per building per year)	Grades 9-12 (per building per year)
	Digital Subscription Services		
☐	Discovery Education streaming* 4,000 videos	**$1,570**	**$2,095**
☐	Discovery Education streaming Plus* 7,700 videos	**$2,615**	**$3,095**
☐	Discovery Education Science for Middle School*	**$1,995**	**N/A**
☐	Discovery Education Science for Elementary*	**$1,695**	**N/A**
☐	Discovery Education Science K-8 (both Middle School and Elementary)	**$1,995**	**N/A**
☐	Discovery Education Health*	**$1,695**	**$1,695**
☐	Discovery Education MediaShare	**$495**	**$495**

*special pricing available for buildings with low student enrollment (less than 200 students)

	Hardware Solutions	
☐	Discovery Media Server 2TB	**$6,495**
☐	Discovery Media Server 4TB	**$9,995**
☐	Discovery Media Server 9TB	**$12,995**

BUYER INSIGHTS

B2T

Purchasing

Choosing a Video Platform

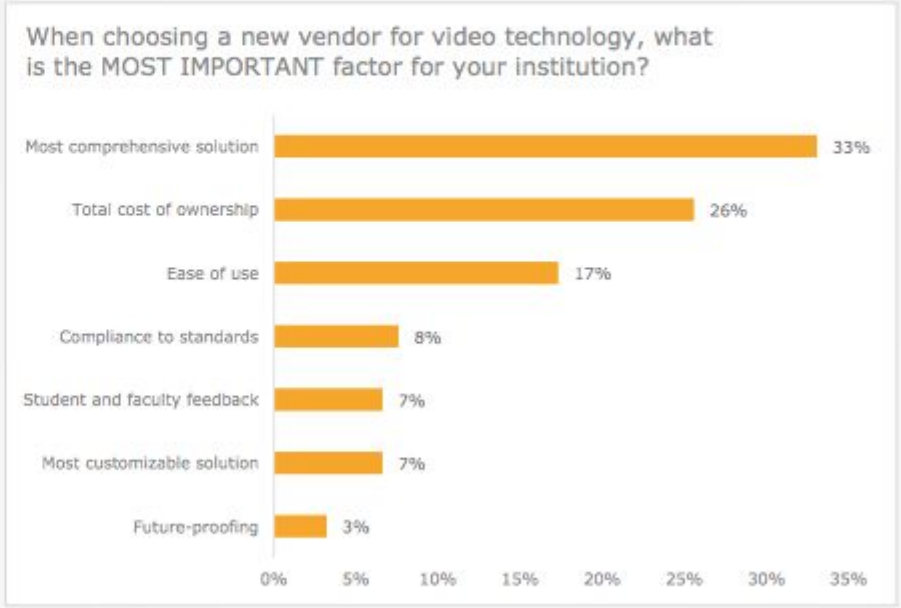
B2T

When organizations do choose to deploy a video platform of their own, they need to decide which platform will work best for their needs. Many factors go into this decision. However, when asked which is the most important factor, a third of respondents seek a platform that offers the "most comprehensive solution (combines the most uses and integrates with the most existing systems, so you need fewer different vendors overall)". While most schools are, as noted previously, using more than one solution, they would prefer to keep that number as low as possible.

Another quarter consider cost the most important factor. Since cost savings are one reason to keep the total number of vendors low, these two top priorities are somewhat intertwined.

Several other factors received noticeable but less significant number of institutions considering them the top priority—compliance to standards, feedback from students and faculty, flexibility, and an eye toward future-proofing.

Many seek a platform that combines the most uses and integrates with the most existing systems, to need fewer different vendors overall

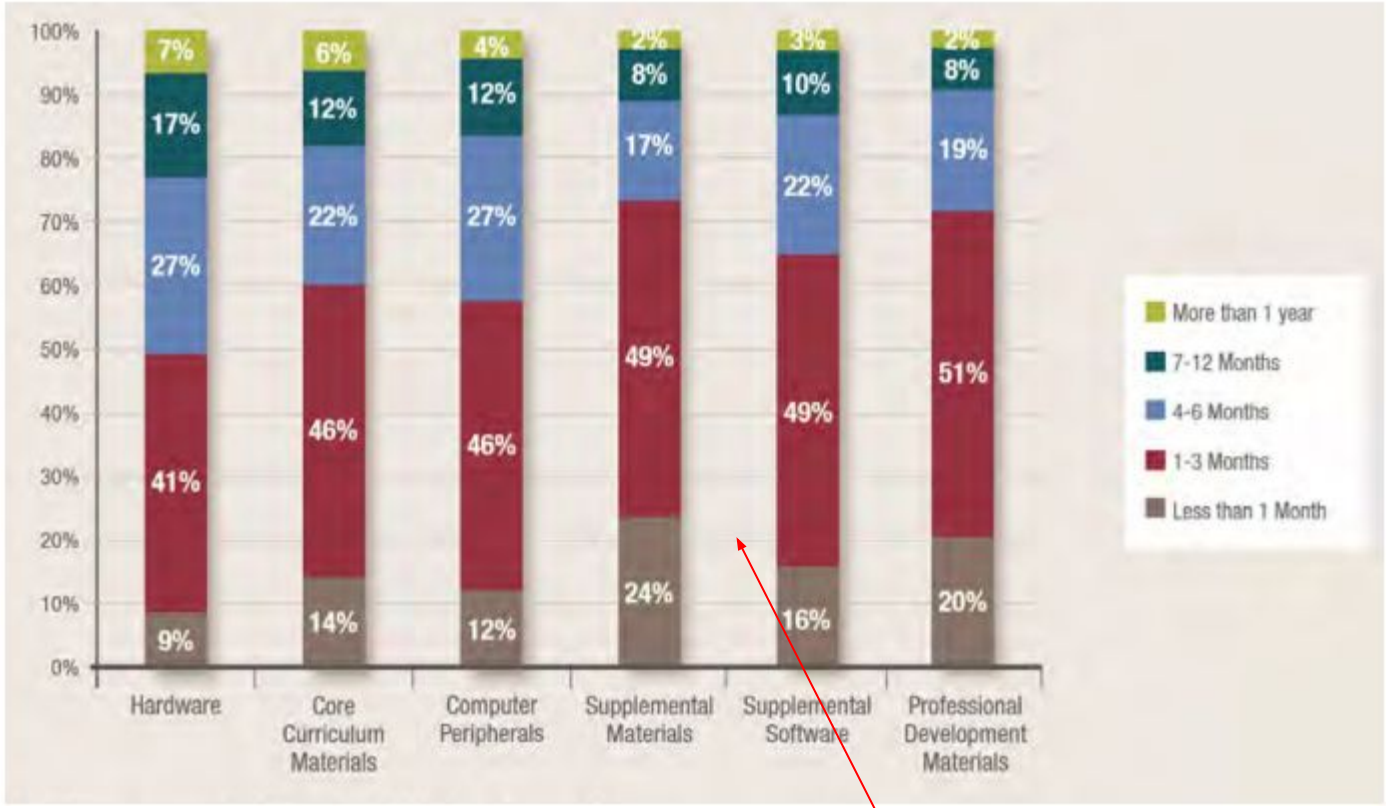


Kaltura: State of Video 2018

Buyer Insights

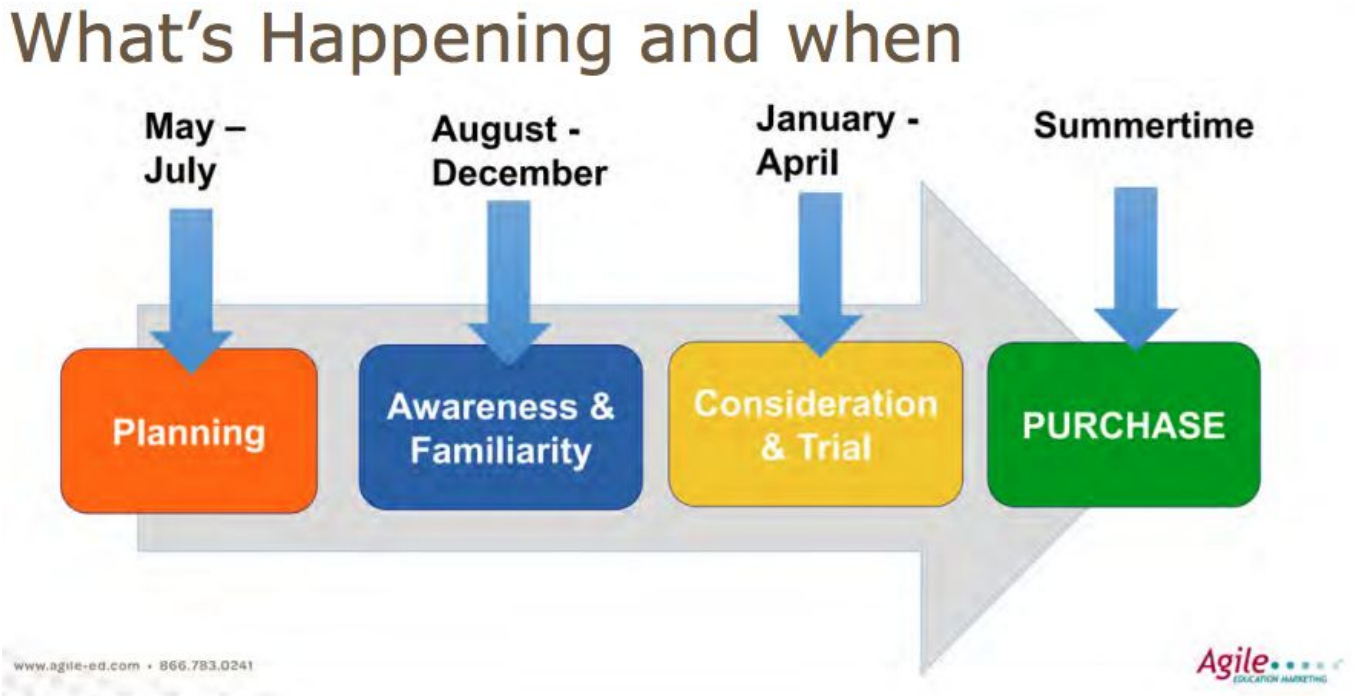
Sales Cycle for Supplemental Materials

B2T



Buyer Insights

B2T


What's Happening and when
May – July
August - December
January - April
Summertime
Planning
Awareness & Familiarity
Consideration & Trial
PURCHASE
www.agile-ed.com • 866.783.0241
Agile
EDUCATION MARKETING

Sales Cycle

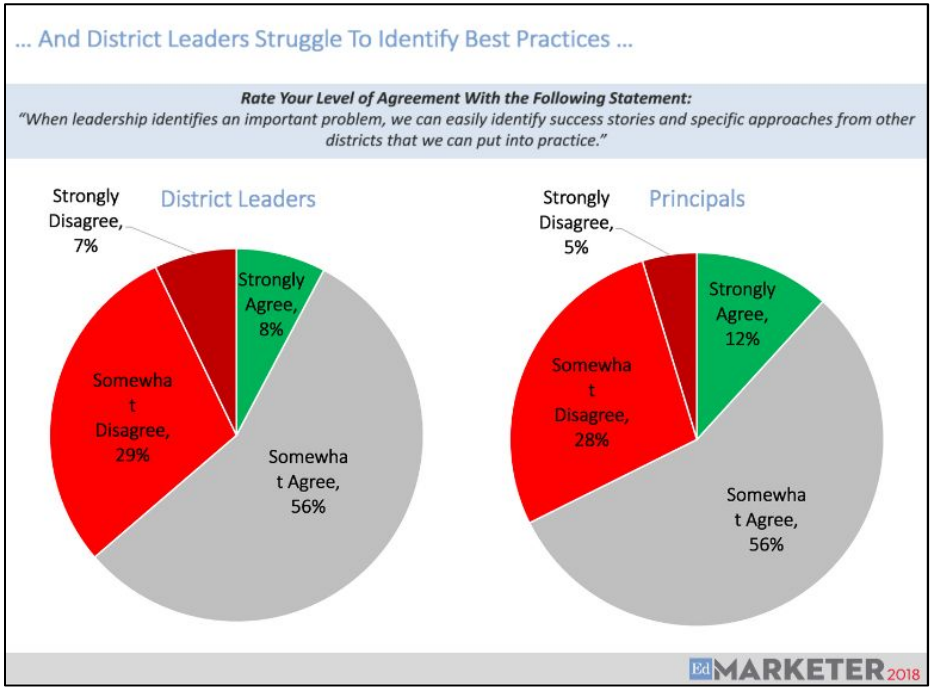
B2T

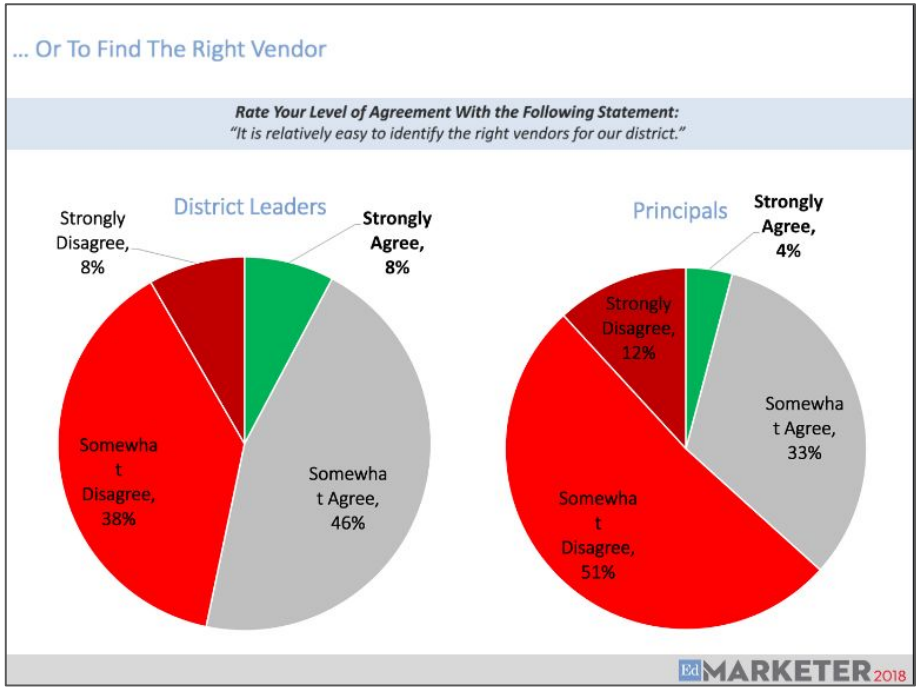
- May-July: Planning
  - When educators assess needs and do their research
  - Connect with decision makers whose time is at premium
  - Scale back marketing but stay in communication
  - Optimize website for target keywords
- **August - December:** Awareness and Familiarity
  - Focus on top of the lead funnel
  - Things to do:
    - Newsletters, print materials, webinars, workshops, conferences. PR
    - Social media - share content and help educators get to know your brand
    - Sell directly to teachers
- **January - April**: Consideration and Trial
  - Now give them information they need to make decisions
  - How to market:
    - Emails - about efficacy and results
      - CTA: Product demos
    - Content marketing:
      - More product-focused information and less general
    - Direct mail:
    - Workshops, conferences
    - Testimonials
    - Blogs, articles - showcase how you're product works
- Summertime: Purchase
  - 60-70% of purchases made

Buyer Challenges

- Few district leaders and principals feel they can easily ID the right vendor for their district

B2T



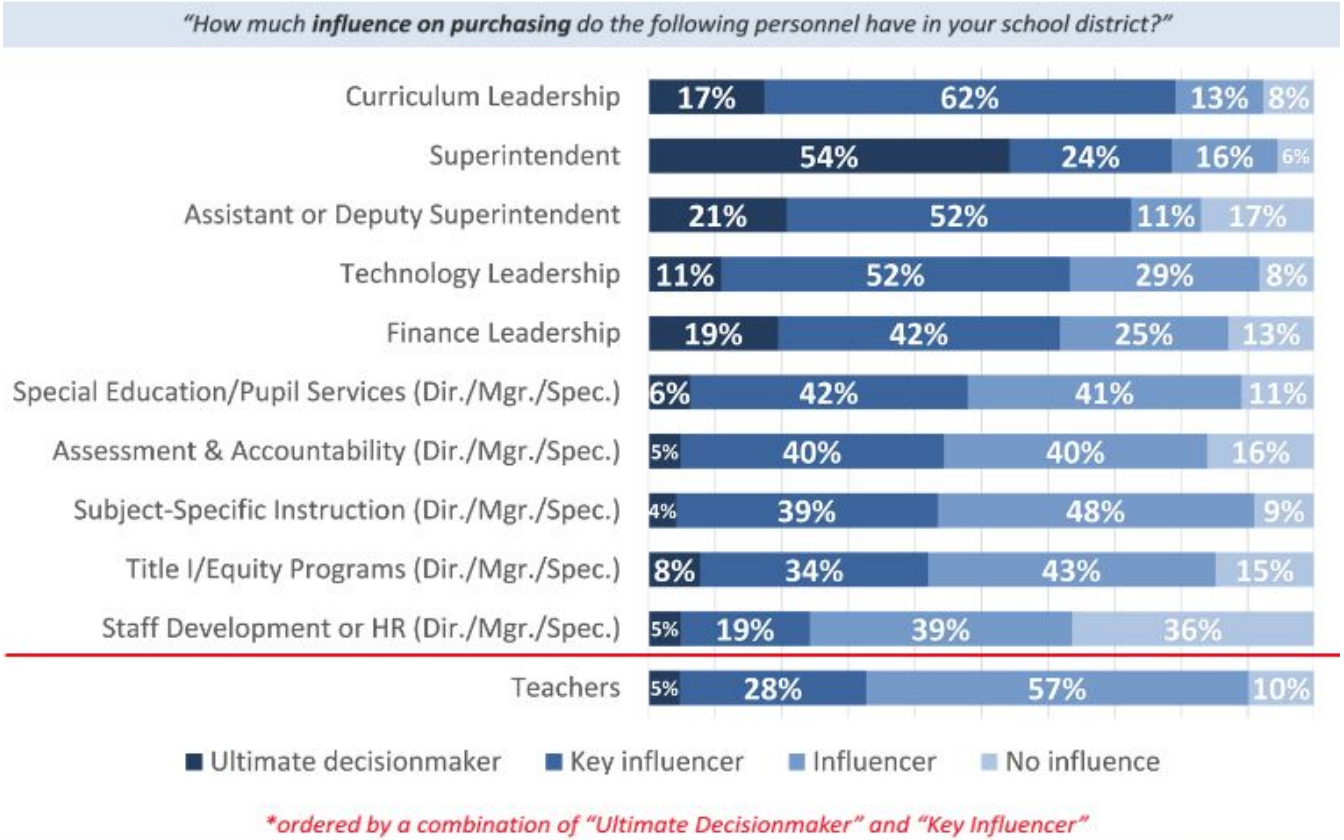


Buyer Insights

EdWeek: State of Education 2018

Purchasing Roles

B2T



Note the following roles involved in purchasing decisions.

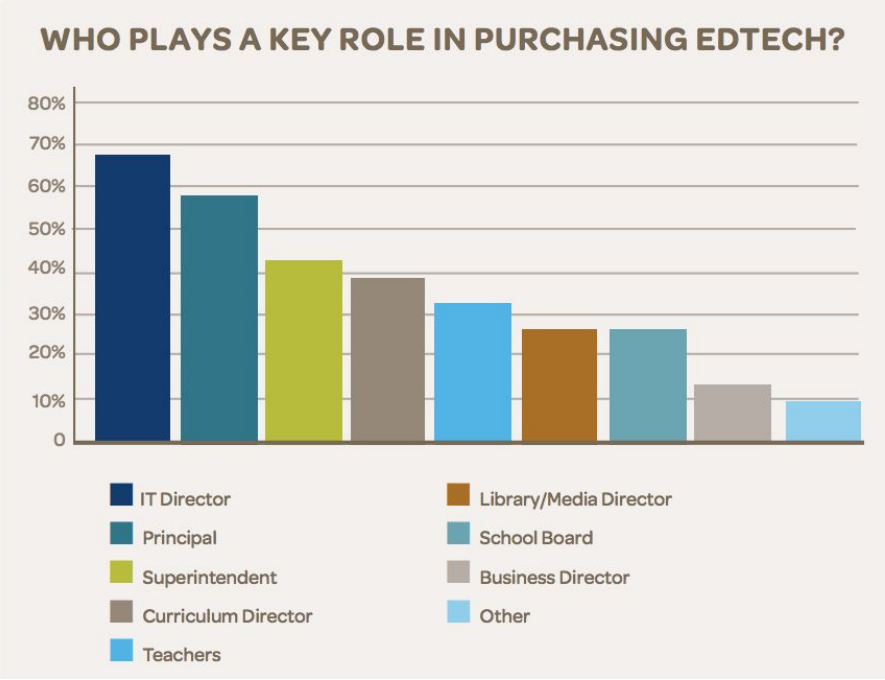
- **Decision makers:** superintendent, curriculum leadership, assistant superintendent, tech leadership
- **Influencers:** curriculum leadership, assistant superintendent, tech leadership, teachers

Buyer Insights

EdWeek: State of Education 2018

Purchasing

B2T



Who Makes Decisions

Product Type	District Decision	School Decision	Both
Core curriculum including digital	28.2%	34.6%	26.3%
Hardware	30.9%	35.0%	26.3%
Professional development	21.2%	37.4%	33.2%
Computer peripherals	24.8%	37.6%	24.4%
Digital whiteboards	26.3%	40.2%	23.5%
Digital projectors	24.2%	42.8%	23.7%
Supplemental software	18.6%	43.8%	28.2%
Supplemental materials, no digital	11.8%	55.8%	24.8%

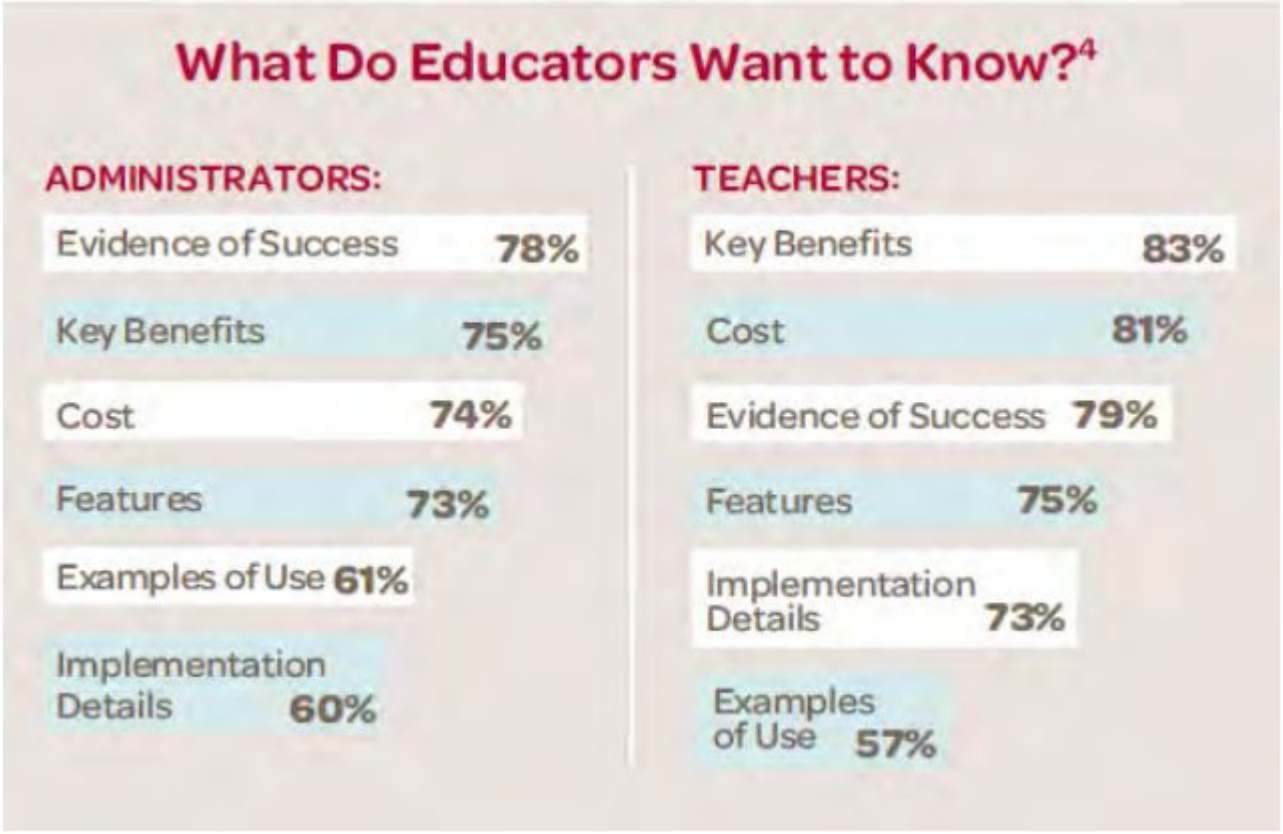
How decisions are made:

- Teachers have bottom-up influence over what's purchased; many purchases start when teachers recognize a need for a product or

Agile Marketing: Classroom Purchasing Power (2013)

Buyer Insights

B2T


What Do Educators Want to Know?[4]
ADMINISTRATORS:
Evidence of Success 78%
Key Benefits 75%
Cost 74%
Features 73%
Examples of Use 61%
Implementation Details 60%
TEACHERS:
Key Benefits 83%
Cost 81%
Evidence of Success 79%
Features 75%
Implementation Details 73%
Examples of Use 57%

B2T

Teachers

Teachers

B2T

- What they buy (see graphic below)
  - Apps for personal use: 77.4%
  - Computer software for classroom: 11.8%
  - Apps for student use: 17.6^
  - Reference materials: 33.2%

Item	Personal Funds	School Funds
Art supplies	45.1%	41.1%
Paper, pens, tissue	49.4%	47.0%
Classroom decorations	68.7%	18.6%
Workbooks	8.9%	72.3%
Lesson materials	52.2%	46.1%
Apps for personal use	77.4%	7.1%
Computer software for classroom	11.8%	67.3%
Professional materials	45.3%	47.6%
Reference materials	33.2%	53.1%
Classroom library books	47.6%	35.0%
Student rewards	80.4%	12.1%
Apps for student use	17.6%	59.5%
Classroom magazines	25.7%	43.3%

Median Teacher Salaries (need to update)
- Elementary School: $55,490
- High School: $58,000

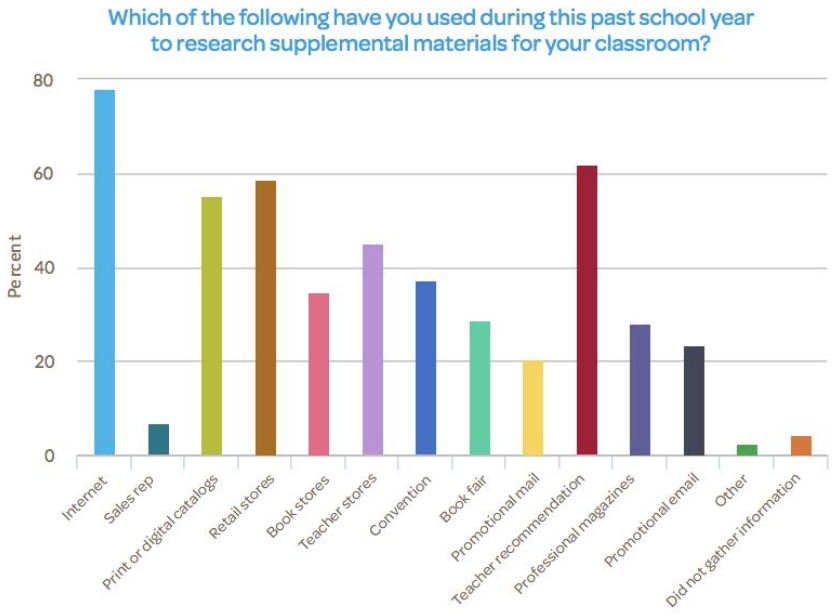
Teachers' role in purchasing decisions
- 89% of teachers reports they are somewhat to completely involved in purchasing classroom supplies
- 75% are somewhat to completely involved in purchasing supplemental materials
- 58% somewhat or completely involved in purchasing core curriculum materials
- 38% choose technology for their classroom
- 28% offer input to their principal who makes the purchase decision

Teachers value discounts
- 68% will show at different stores to find the best price on expensive purchases
- 55% will buy more of a product they don't immediately need if it's on sale
- 55% head straight for the clearance section in a store
- 53% delay a purchase until it goes on sale

Teachers buy online
- 73% have credit cards
- 83% use debit cards
- 47% say they do more shopping online than ever before

Teachers use their own money
- 2016-2017 - teachers spent an average of $468 on their classrooms (11% of annual salary)
- 64% spend every couple months

Teachers



Teachers most valued resources:

- Websites
- Word of mouth
- Conferences
- Emails
- Webinars

Messages that resonate most with teachers:

- Messages about saving time and improving student outcomes
- Capturing student attention and interest
- Providing more individualized instruction to high-achieving and at-risk students
- Improving literacy skills

What teachers want to learn from emails:

- Key benefits - 83%
- Cost - 81%
- Evidence of success - 79%
- Features - 75%
- Implementation details - 73%
- Examples of Use - 57%

Spending Power and Buying Habits In and Out of the Classroom (whitepaper). Agile Education Marketing (2017).

B2T

How Teachers Find Out about New Products

- 71% word of mouth
- 54% email
- 43% link from someone they know

Educators	General Population
Facebook – 71%	55%
Pinterest – 35%	15%
Twitter – 15%	8%
LInkedIn – 12%	9%
Instagram – 19%	14%

Teachers

B2T

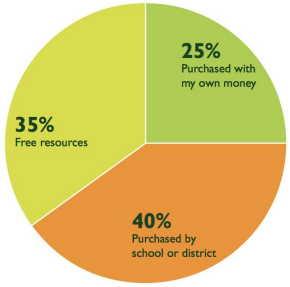
Teachers Know Best - Bill & Melinda Gates

Teachers who can choose more of their products are 30 percent more likely to report they are effective compared to those who have relatively little choice about which products they use. Only one-fifth of teachers select more than half of the products they use; perhaps not surprisingly, this group reports the highest perceived effectiveness. Conversely, one-third of teachers get to choose less than 10 percent of their own products, and this group is most likely to rate them as ineffective.

We learned that teachers' product choices are driven primarily by word of mouth, confirming anecdotal reports. Teachers are actively looking online, searching social networks, and looking to peers and colleagues for recommendations about what digital instructional tools can be most helpful in the classroom.

- 59 percent of teachers said they rely on recommendations from administrators.
- 53 percent search online, with the top sources cited being Google or other search engines, Pinterest, Amazon, Edutopia, and educational conferences or conventions.
- 47 percent of teachers said they rely on recommendations from other teachers.

Figure 5.
Teachers Opening Their Own Wallets — and Finding Free Resources As Well
Average percent of time teachers spent using products and resources



Source: PBS and Grunwald Associates LLC, 2010

Teachers spent $652 of their own money on classroom supplies - a 39% increase since 2013

Discounts

- 88% actively search for companies that offer a teacher discount
- 80% find out about deals from other educators; 58% via social media

Agile Marketing: 2018 Teacher Shopping Preferences and Statistics Survey

TEACHER DEMOGRAPHICS

B2T

Figure 1. Percentage distribution of teachers in public elementary and secondary schools, by instructional level and sex: School years 1999–2000 and 2015–16

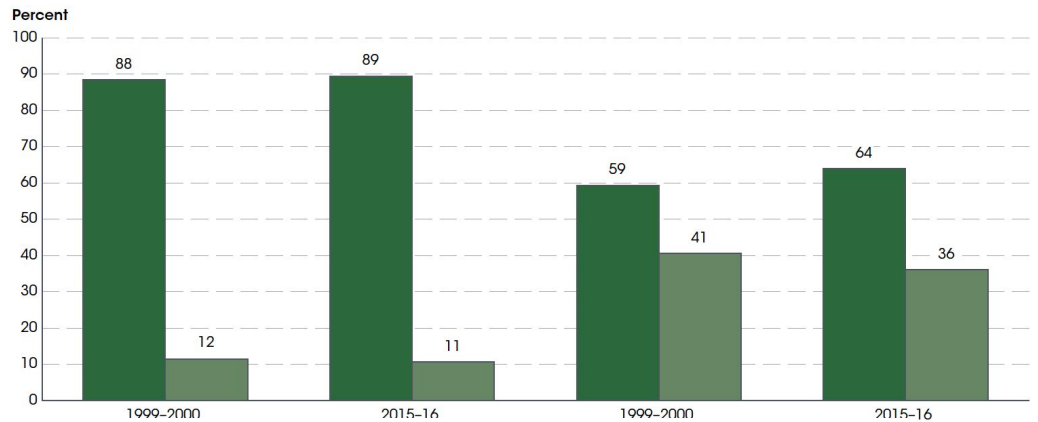
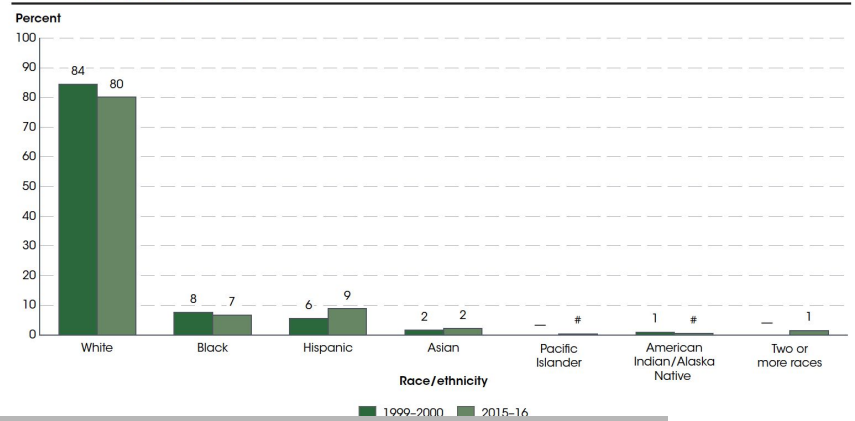


Figure 2. Percentage distribution of teachers in public elementary and secondary schools, by race/ethnicity: School years 1999–2000 and 2015–16



- Marketing demographics:
  - Mostly female teachers (77%) in K-6
  - More male teachers in secondary

About 77 percent of public school teachers were female and 23 percent were male in 2015–16, with a lower percentage of male teachers at the elementary school level (11 percent) than at the secondary school level (36 percent). Overall, the percentage of public school teachers who were male was 2 percentage points lower in 2015–16 than in 1999–2000. At the elementary school level, the percentage of male teachers was 1 percentage point lower in 2015–16 than in 1999–2000. By comparison, at the secondary school level, the percentage of male teachers was 5 percentage points lower in 2015–16 than in 1999–2000.

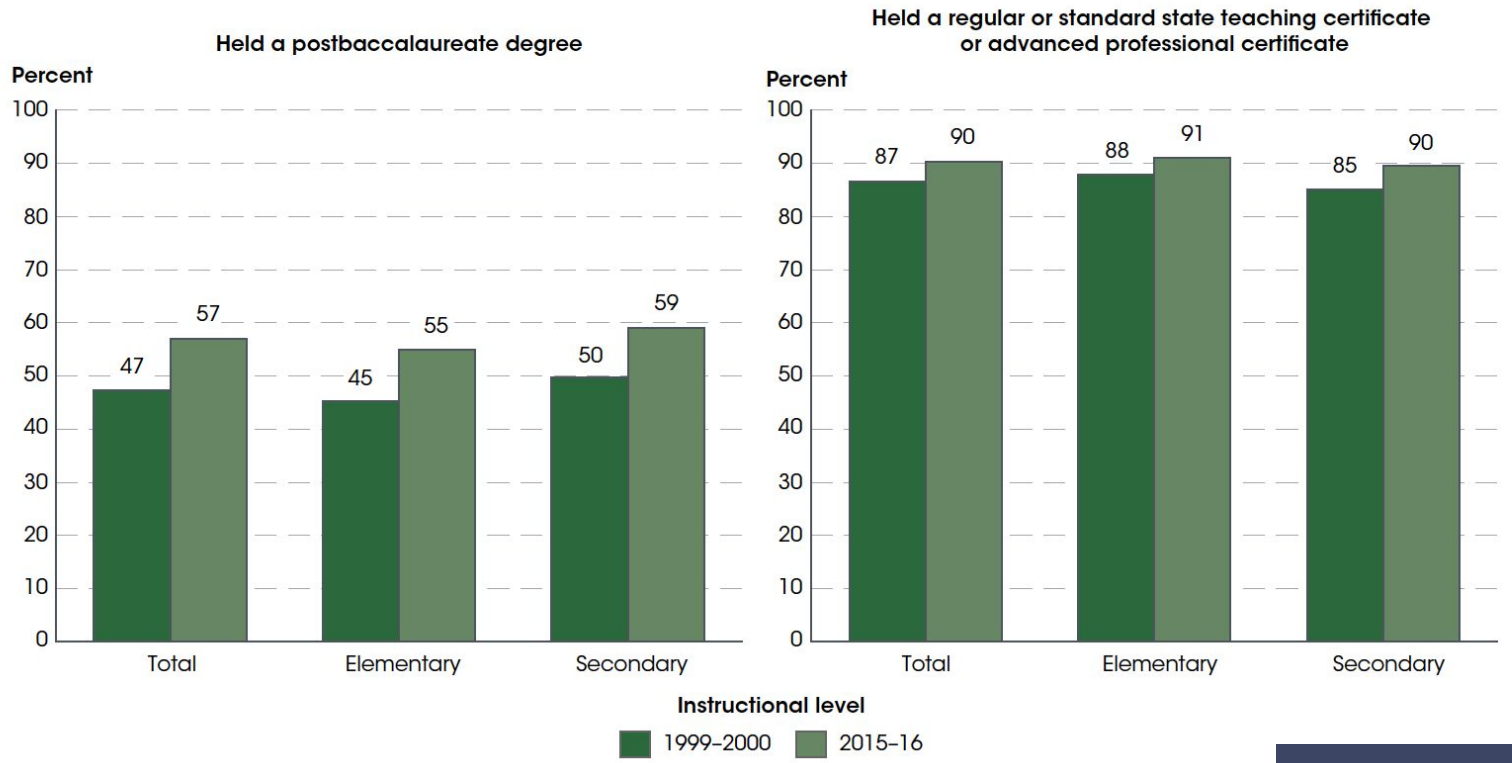
Buyer Insights

IES: The Condition of Education: May 2018

TEACHER DEMOGRAPHICS

B2T

Figure 3. Percentage of public school teachers who held a postbaccalaureate degree and percentage who held a regular or standard state teaching certificate or advanced professional certificate, by instructional level: School years 1999–2000 and 2015–16



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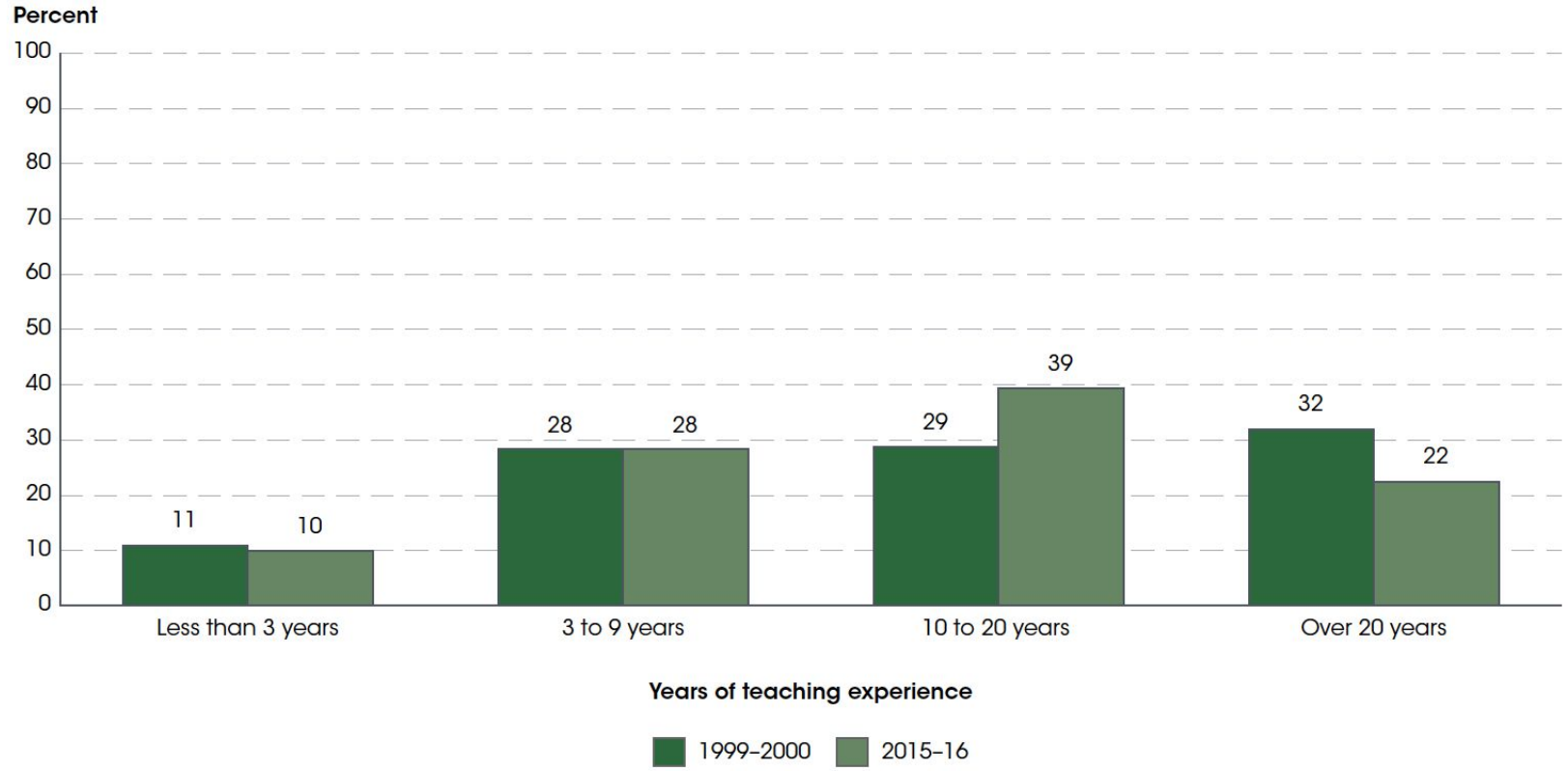
IES: The Condition of Education: May 2018

TEACHER DEMOGRAPHICS

B2T

Figure 4. Percentage distribution of teachers in public elementary and secondary schools, by years of teaching experience: School years 1999–2000 and 2015–16



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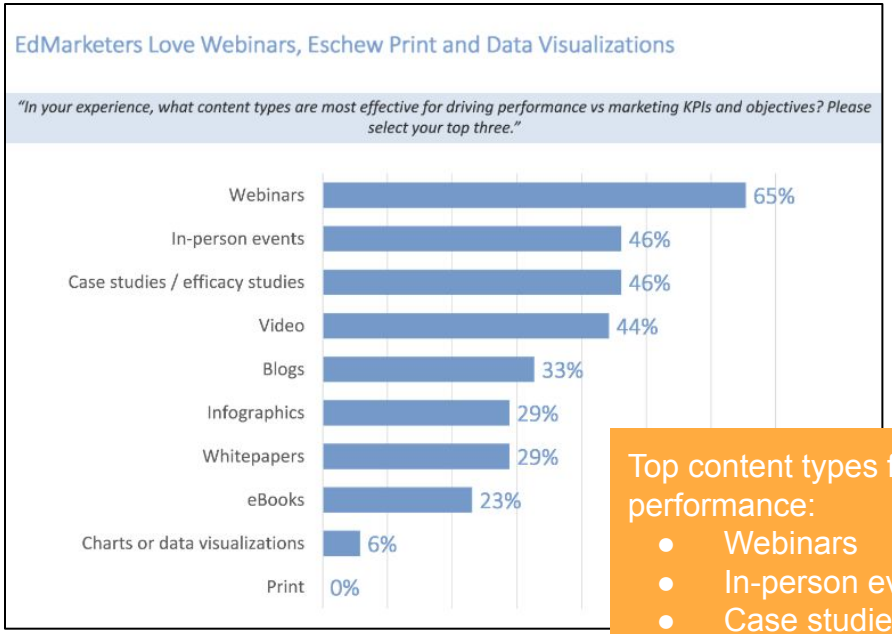
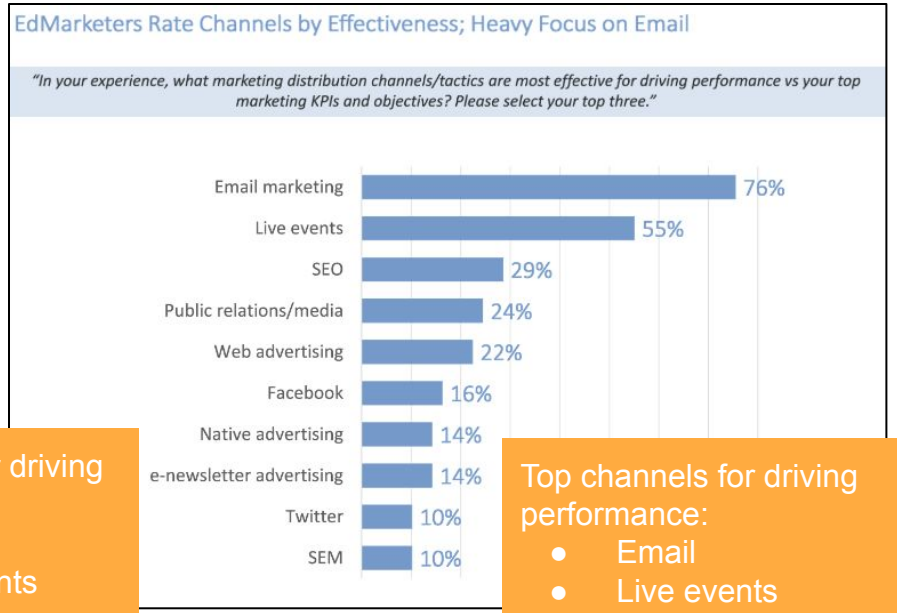
IES: The Condition of Education: May 2018

Marketing Content Types & Channels (per EdMarketers)





Top content types for driving performance:

- Webinars
- In-person events
- Case studies
- Video
- Blogs
- Infographics
- Whitepapers
- e-Books

Top channels for driving performance:

- Email
- Live events
- SEO
- PR
- Web ads
- Facebook

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Marketing Trends

Email Marketing

- More opens on mobile and tablet; more clicks on laptop and desktop
- Timing for K-12:
  - T, W, **Th** (Th highest opens)
  - 9am best opens
  - 10 am best click rate
- Timing higher ed:
  - T, **W**, Th (W highest opens)
  - 11 am best opens
  - 10 am best click rate
- Personalization
  - Personalizing to *and* from fields is emerging best practice

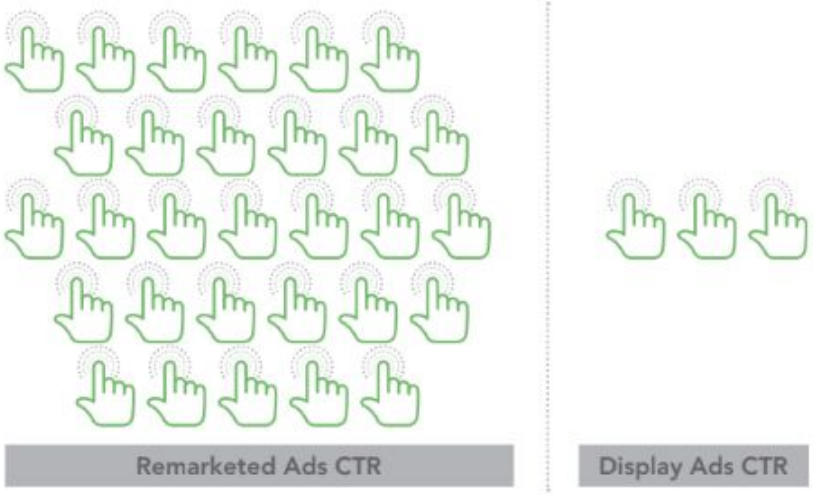
Average Performance

	Delivery Rate	Total Open Rate	Total Click-Through Rate
Higher Education Leadership			
2015	91.79%	**26.36%**	**3.10%**
2016	95.37%	25.62%	2.86%
2017*	**97.28%**	21.80%	2.61%
Higher Education Faculty			
2015	90.48%	15.79%	2.74%
2016	93.53%	15.95%	2.47%
2017*	**97.00%**	**16.48%**	**3.58%**
K-12 Leadership			
2015	92.28%	**7.39%**	**0.62%**
2016	93.57%	6.08%	0.61%
2017*	**94.13%**	6.46%	0.46%
K-12 Teachers			
2015	88.98%	5.81%	0.93%
2016	92.49%	5.52%	0.95%
2017*	**92.59%**	**6.82%**	**0.97%**

*Date range 1/1/17-6/30/17.

Remarketing Ads

With ad remarketing, you can target prospects who have viewed a particular product or certain web pages—providing a highly relevant and personalized user experience. Since as many as 96% of people who visit your website aren't ready to buy, the method has become a powerful way to draw those prospects back into your conversion funnel. According to a study cited by CMO.com, the average click-through rate for remarketed ads is 10 times greater than the average click-through rate for display ads.

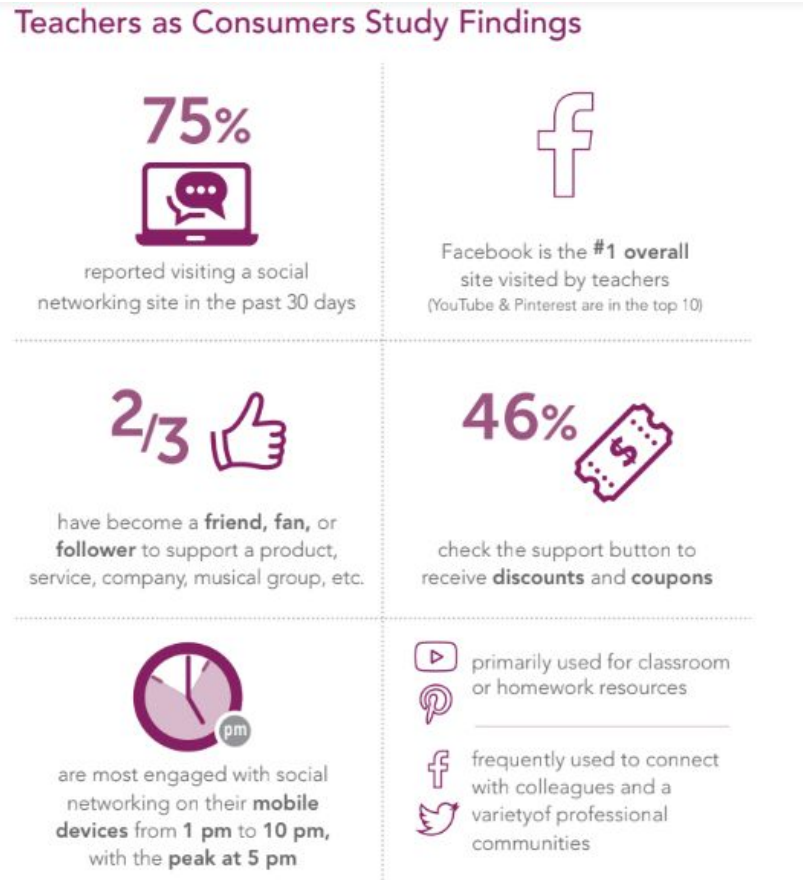


- 76% of teachers say when they need information the first place they look is the internet
- 69% say they are doing more shopping on the Internet than ever before

Social Media

- Facebook: best to make readers laugh, smile, or think to create social bonds with educators
- Pinterest: teachers use as a visual search engine to find, save, and share lessons, crafts, products, activities, and PD materials
- Twitter: teachers use to get news and connect with educators and leaders
- Instagram: teachers use to share what's happening in their classrooms vs. future ideas - keep posts reality based vs aspirational

	Organic Social Marketing	Paid Social Ads
Strategy	Relationship Nurturing	Brand Awareness, Short-term Offers, Audience Building
Target Audience	Current followers	Prospective audiences targeted by demographics or interests
Cost	Free; social marketing team time	$ investment
Website Traffic	Sustained traffic over time	A surge of visitors when ad



July = most engagement; Oct = most impressions

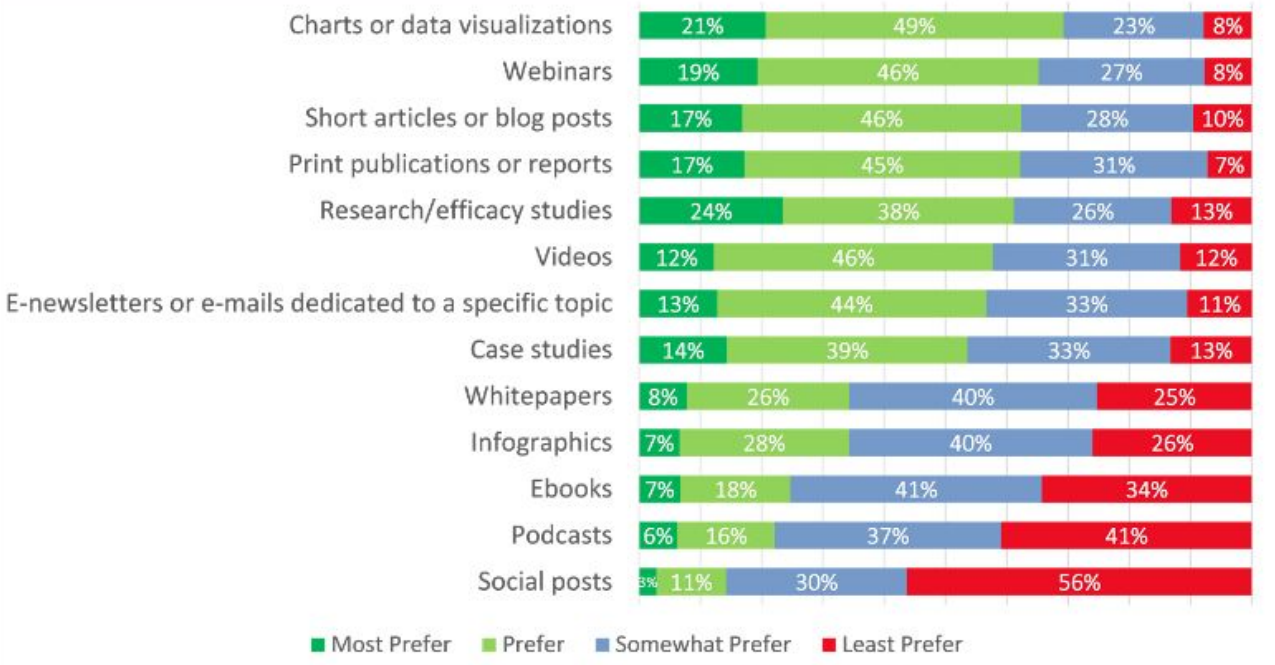
B2T

District Leaders

Marketing Content Types for District Leaders

B2T

"When consuming professional news, research, or other information that helps you do your job, please indicate your preference for the following formats:"



**ordered by a combination of "Most Prefer" and "Prefer"*

Best content types for district leaders:

- Charts
- Webinars
- Blog posts
- Reports/studies
- Videos
- Newsletters
- Case studies

Worst content types for district leaders:

- Social media
- E-books
- Infographics
- Whitepapers

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Buyer Insights

B2T

Tech Leaders

Technology Leader

TOP 3 CHALLENGES
1. Budget constraints
2. Silos in the district
3. Lack of vision/support

Top 3 Goals:
1. Broadband & network capacity
2. Wireless access
3. **Mobile learning**

Role in purchasing:
- **Tech in the classroom (47% decisionmaker; 47% key influencer)**
- **LMS (40% decisionmaker; 60% key influencer)**

PROFILE
- White male with tech background
- 70k-130k

Top 3 Areas of Need: External

1. C&I for special populations
2. TIED ON MANY ITEMS!
3. Implementing virtual/blended learning

Top 3 Impacts on Vendor Selection:

1. Word of mouth/referrals
2. References from another district
3. Negotiations with selected vendors

Most likely to meet with you:

9 am – 11 am

Your Marketing Lexicon Should Be:

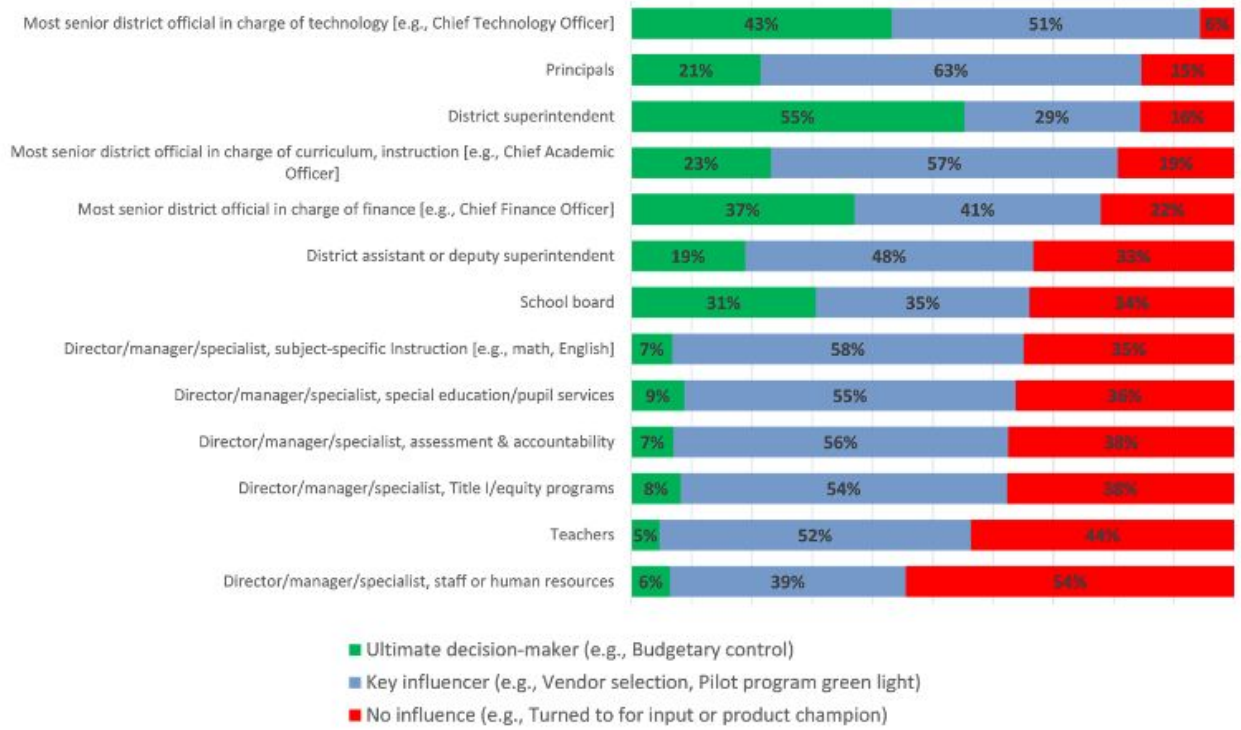
1. Teacher-friendly
2. Proven results
3. Easy-to-use

MESSAGING
- Emphasize the bic picture! Tech leaders more likely to make decisions based on evaluations of attributes like reliability and not on feedback of colleagues and peers

B2T

Tech Leader Insight: We Agree

"How much influence on purchasing do the following personnel have in your district?"



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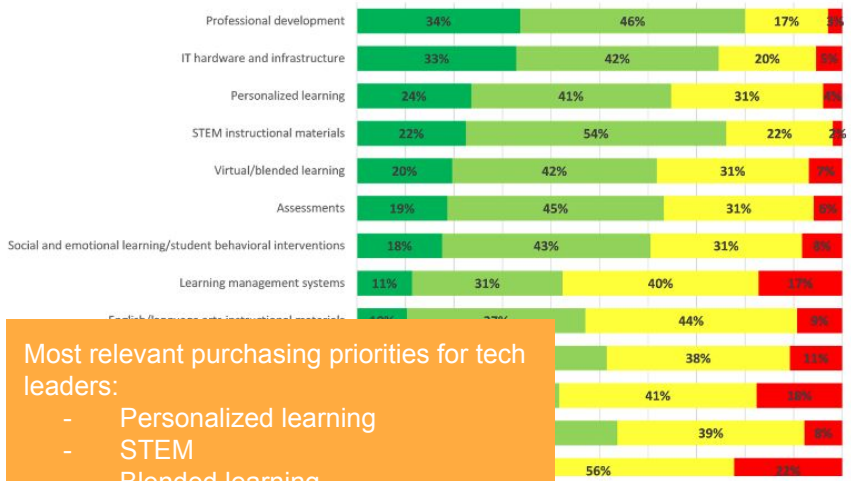
Buyer Insights

Marketing Topics for Tech Leaders

B2T

Tech Leader Insight: PD, Infrastructure, PL and STEM top purchasing priorities

"Over the next two years, how big of a purchasing priority are the following areas?"

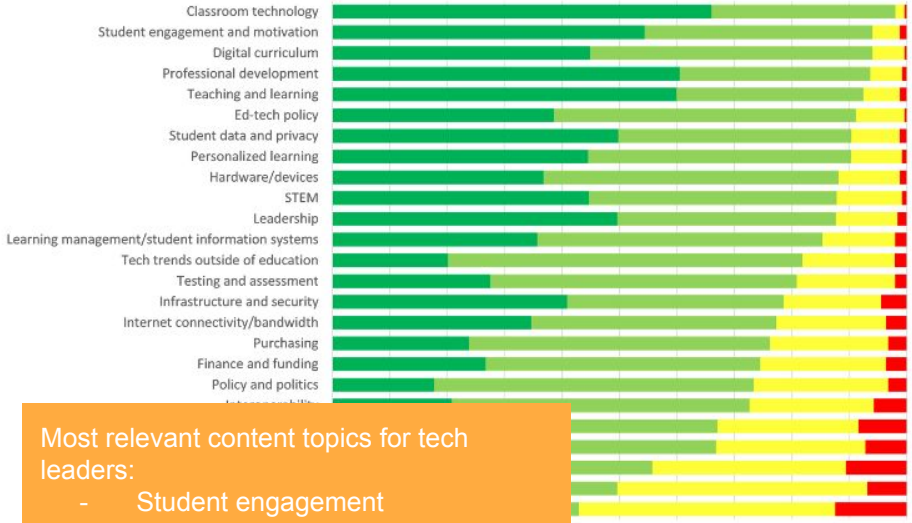


Most relevant purchasing priorities for tech leaders:

- Personalized learning
- STEM
- Blended learning
- LMS
- Language arts
- ELL
- Special ed
- Foreign language

Tech Leader Insight: Interests Aligned with Core District Priorities

"How important is it for you to obtain information on the following topics in order to do your job?"



Most relevant content topics for tech leaders:

- Student engagement
- Digital curriculum
- Personalized learning
- STEM
- LMS

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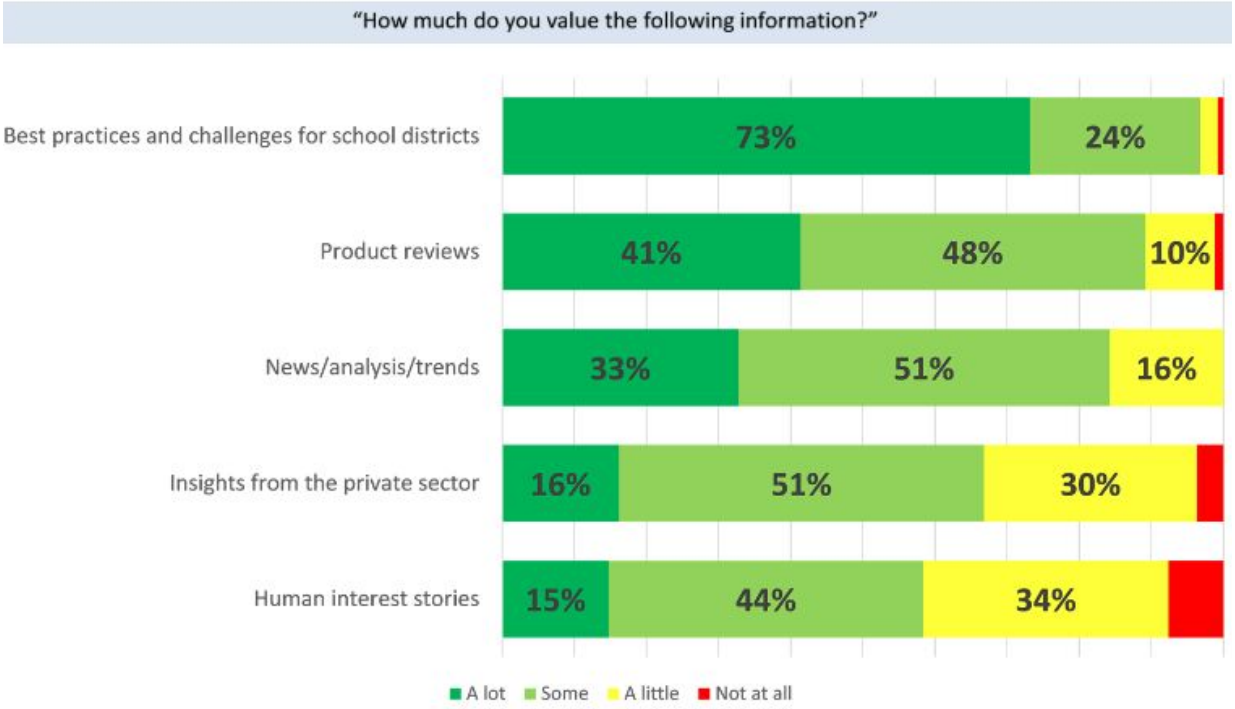
Buyer Insights

B2T

Tech Leader Insight: Gimme Some Best Practice, Please!



Tech leaders want to hear about best practices!

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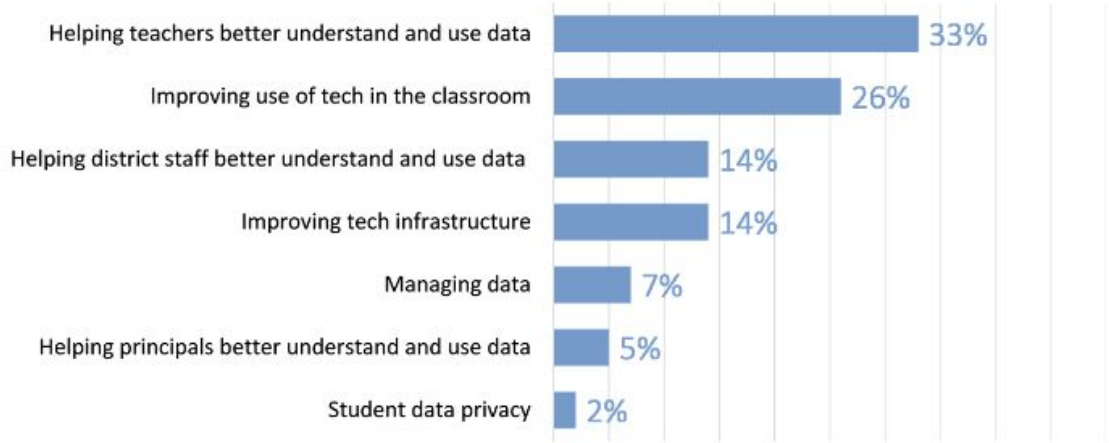
Use of Data and Tech *in the Classroom* Remains a Challenge

*"What is your district's most urgent challenge when it comes to **technology & data**?"*



EdMARKETER 2017 *Flashback*

42% of district leaders said "Very few of our teachers use technology in ways that will result in improved student achievement."

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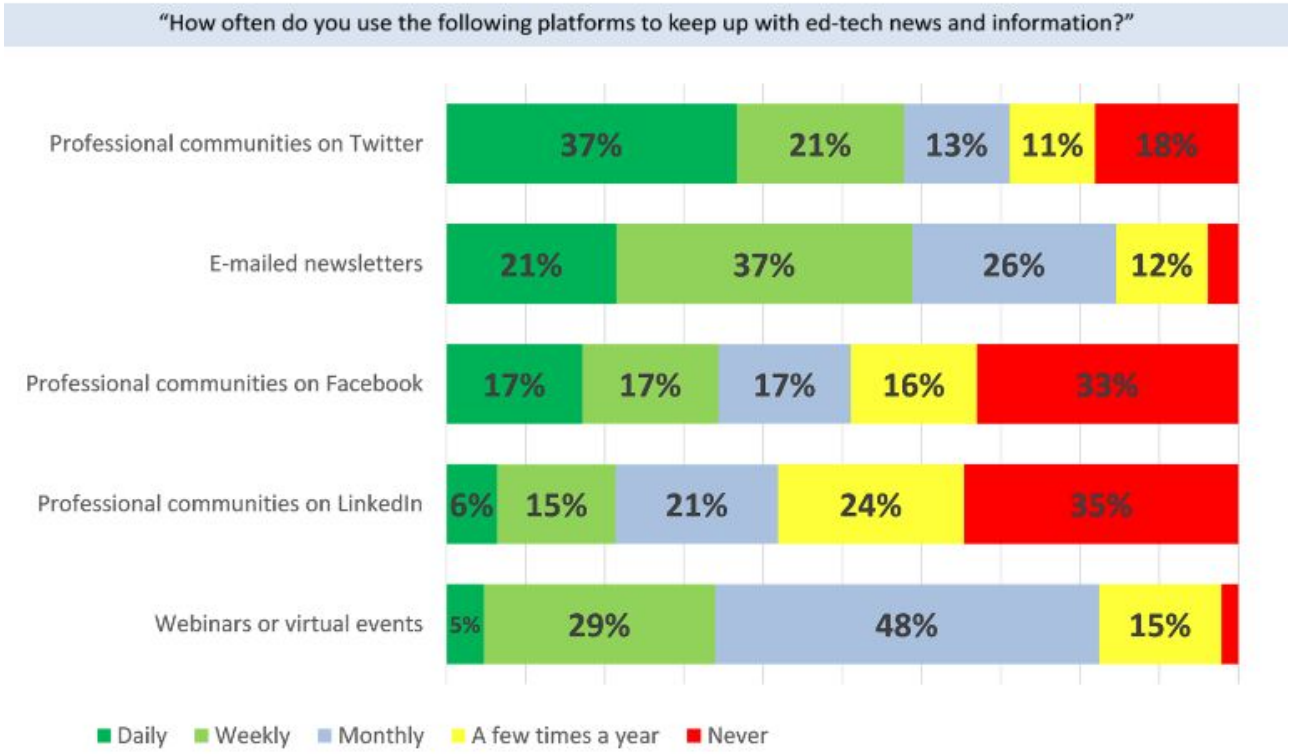
Marketing Content Types for Tech Leaders

B2T



Best content types for tech leaders:

- Twitter communities
- Newsletters
- Webinars

Worst content types for tech leaders:

- Communities on Facebook & LinkedIn

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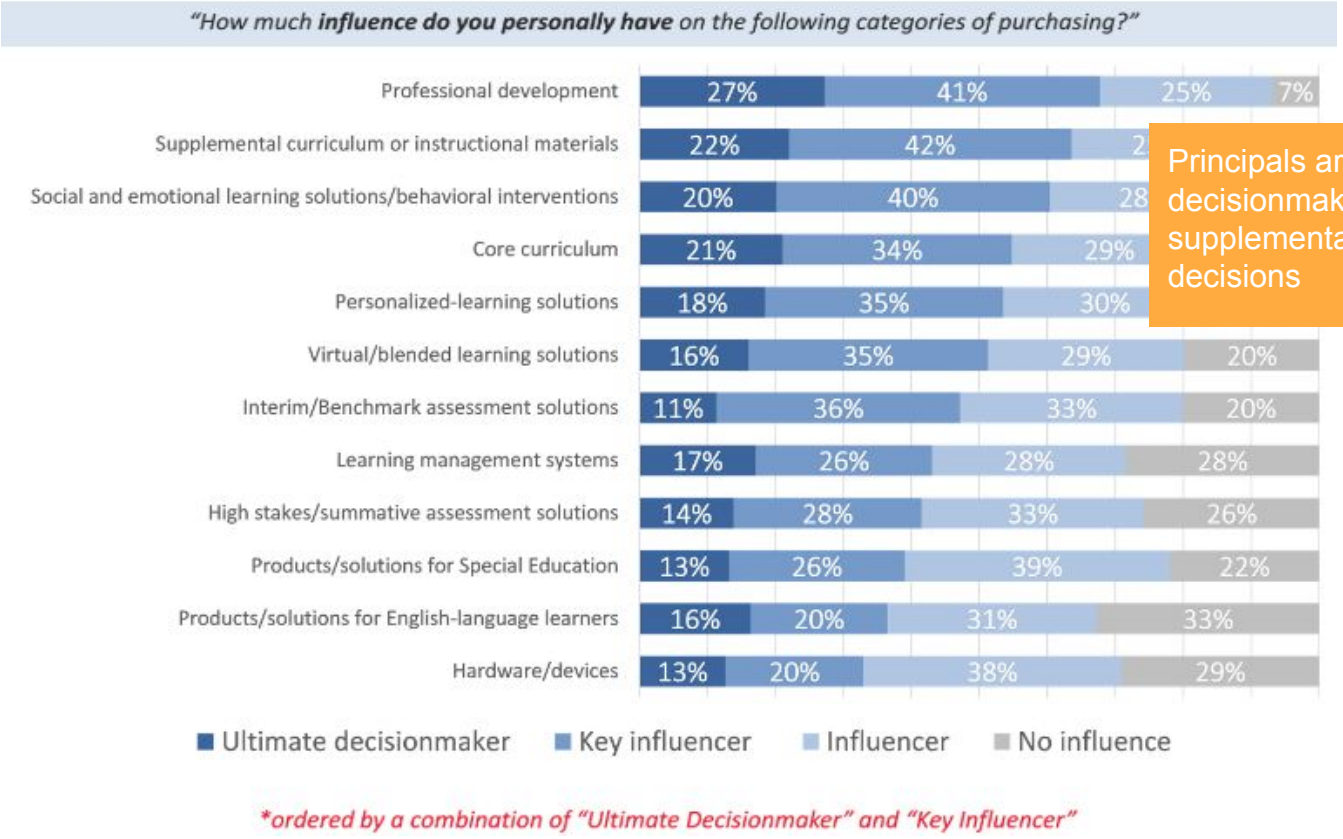
Buyer Insights

B2T

Principals

Purchasing Roles: Principals

B2T



Principals are mostly either ultimate decisionmaker or key influencer in supplemental instructional materials decisions

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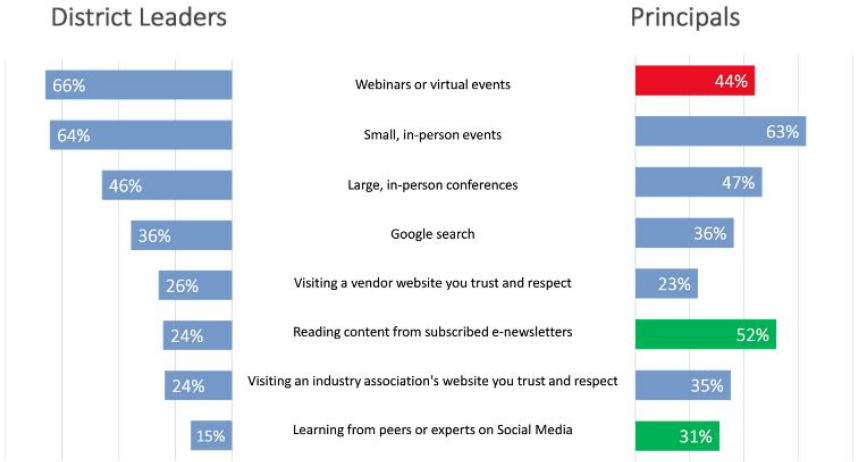
Best Content Types for Principals

B2T

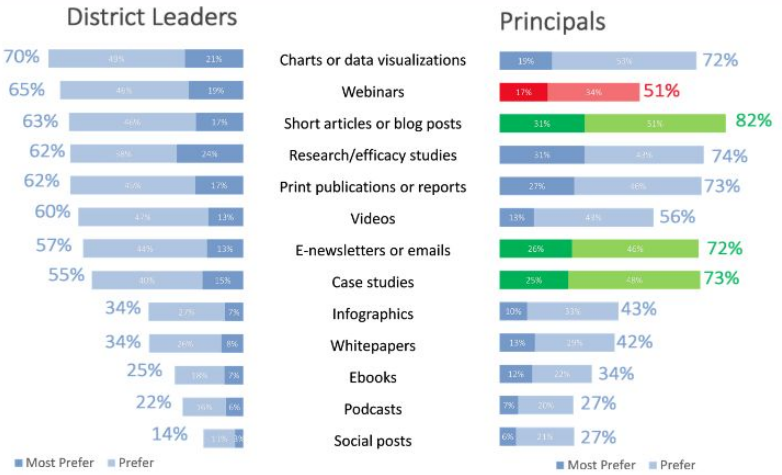
Principals Learn More Frequently Via Newsletters and Social Channels

*"Consider the external research you did (aside from internal conversations) to address high priority issues in your district. **How did you find the information** that helped you develop strategies/courses of action? Please select your top three."*



Preferences for Content Formats Differ As Well

"When consuming professional news, research, or other information that helps you do your job, please indicate your preference for the following formats?"



Best ways to reach principals:

- In-person events
- Newsletters
- Social media

Best content types for principals

- Charts
- Blog posts
- Newsletters
- Case studies

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Buyer Insights

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Superintendents

Superintendent

B2T

Superintendents find digital content use less challenging than their district leader peers, principals, or teachers.

As you go up the seniority ladder, perceptions get progressively rosier - teachers most skeptical, followed by principals, followed by leaders, followed by superintendents.

53-year-old white mail
5 years or less
2-3 year contract
Evaluated annually

Top 3 Areas of Need: External

1. Professional Development
2. C&I for Special Populations
3. Data

Top 3 Impacts on Vendor Selection:

1. References from another district
2. Word of mouth/referrals
3. Their own team's forecasted ROI on vendor solutions

Most likely to meet with you:

9 am – 11 am

Your Marketing Lexicon Should Be:

1. Proven results
2. Achievement
3. Teacher-friendly

B2T

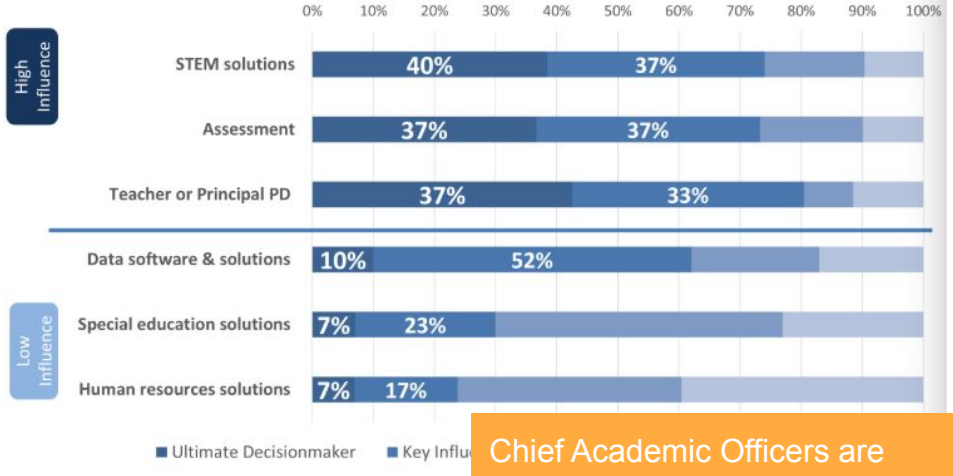
Other Roles

Chief Academic Officer

B2T

Level of Influence: Chief Academic Officer

"To what extent would you be considered an influencer of any decision to move ahead with the following products/services in your district?"



Chief Academic Officers are decisionmakers or influencers in STEM solutions (market STEM content to this group)

Top 3 Areas of Need: External

1. Improving PD and C&I for Special Populations
2. STEM engagement & teacher tech usage
3. Data

Top 3 Impacts on Vendor Selection:

1. References from another district
2. Word of mouth/referrals
3. Their own team's forecasted ROI on vendor solutions

Most likely to meet with you:

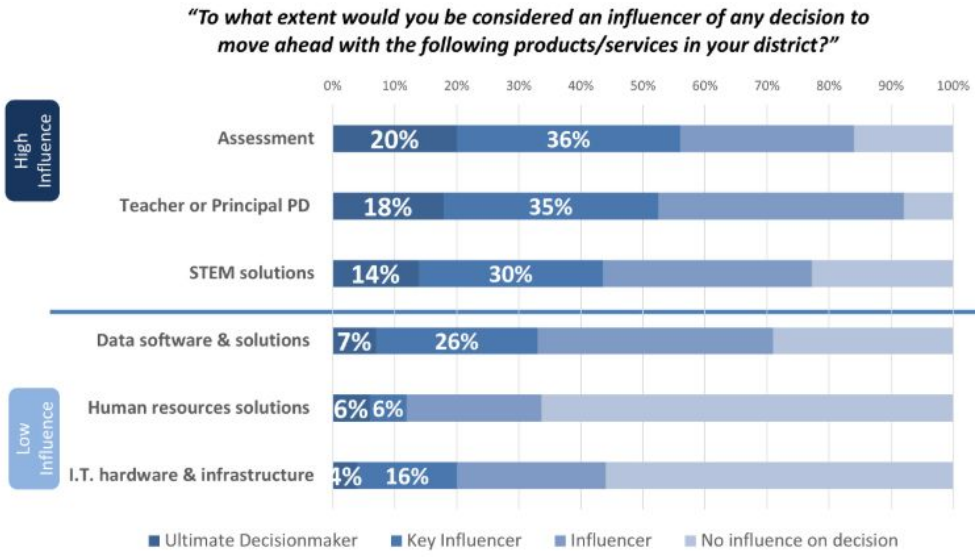
11 am – 3 pm

Your Marketing Lexicon Should Be:

1. Proven results
2. Teacher-friendly & common core-aligned
3. Achievement

Curriculum Manager

Level of Influence: C&I Director/Manager



- 78% female
- Loves to research
- 42% viewed EdWeek webinar in past 6 months

Top 3 Areas of Need: External

1. Personalizing/differentiating instruction
2. PD and C&I for special populations
3. Teachers & Tech

Top 3 Impacts on Vendor Selection:

1. Word of mouth/referrals
2. References from another district
3. Webinars

Most likely to meet with you:

1 pm – 3 pm

Your Marketing Lexicon Should Be:

1. Proven results
2. Teacher-friendly & common core-aligned
3. Rigorous

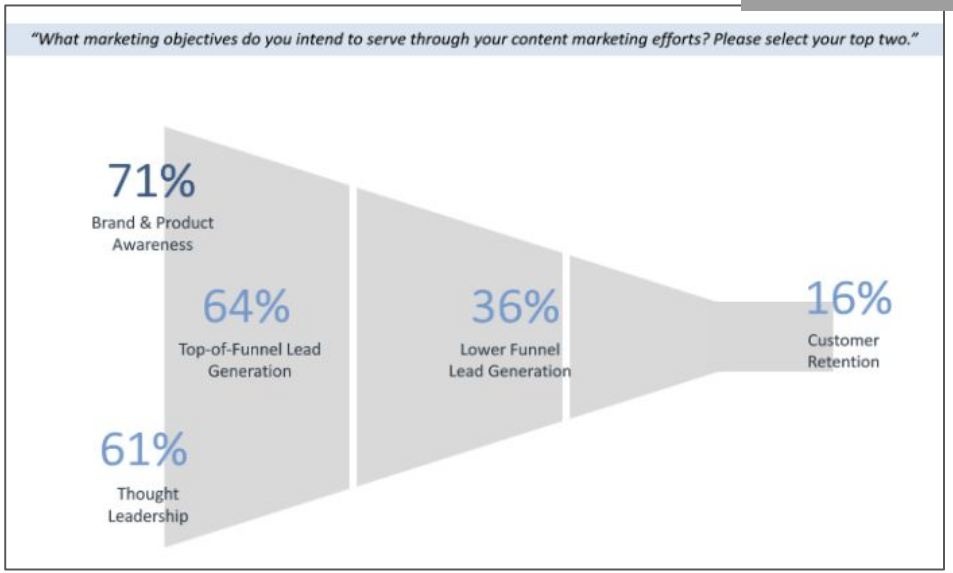
B2T

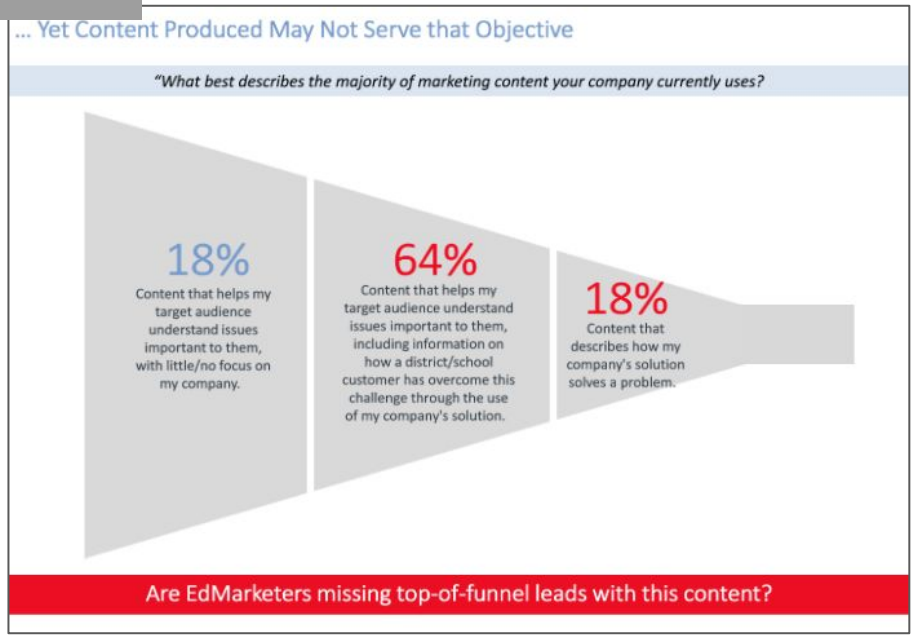
MARKETING/SALES TRENDS IN EDUCATION

Content Marketing

Content Marketing Opportunities

Expectation vs Reality





- While most education marketers identified top-of-the-funnel marketing objectives they hope to achieve through content marketing, MOST content created is actually middle-of-the-funnel
- There's an opportunity to generate more leads by focusing on TOFU content, which addresses market problems *without* mentioning product

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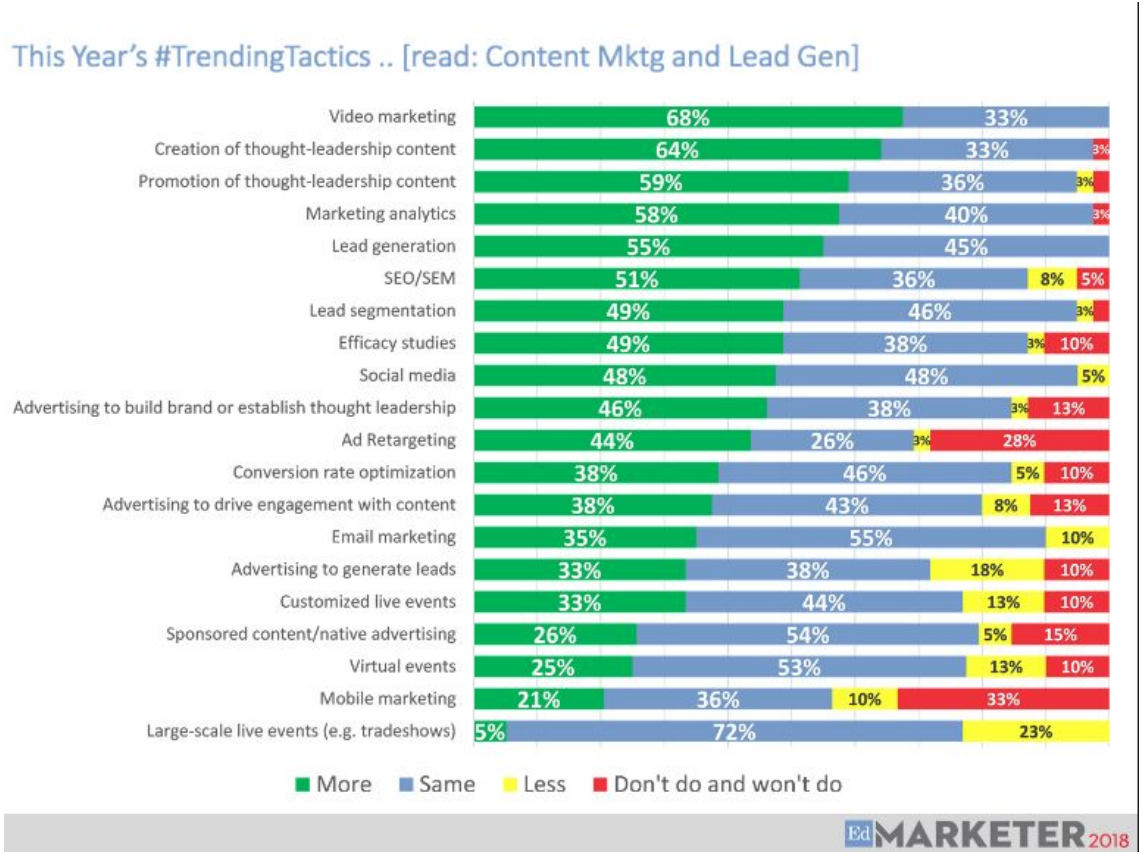
Marketing Trends

Trending Marketing Tactics



- More education marketers focusing on:
  - Video
  - Thought leadership content
  - Lead gen
  - SEO
  - Social media
- Less focus on:
  - Tradeshows
  - Mobile marketing
  - Virtual events
  - Sponsored content

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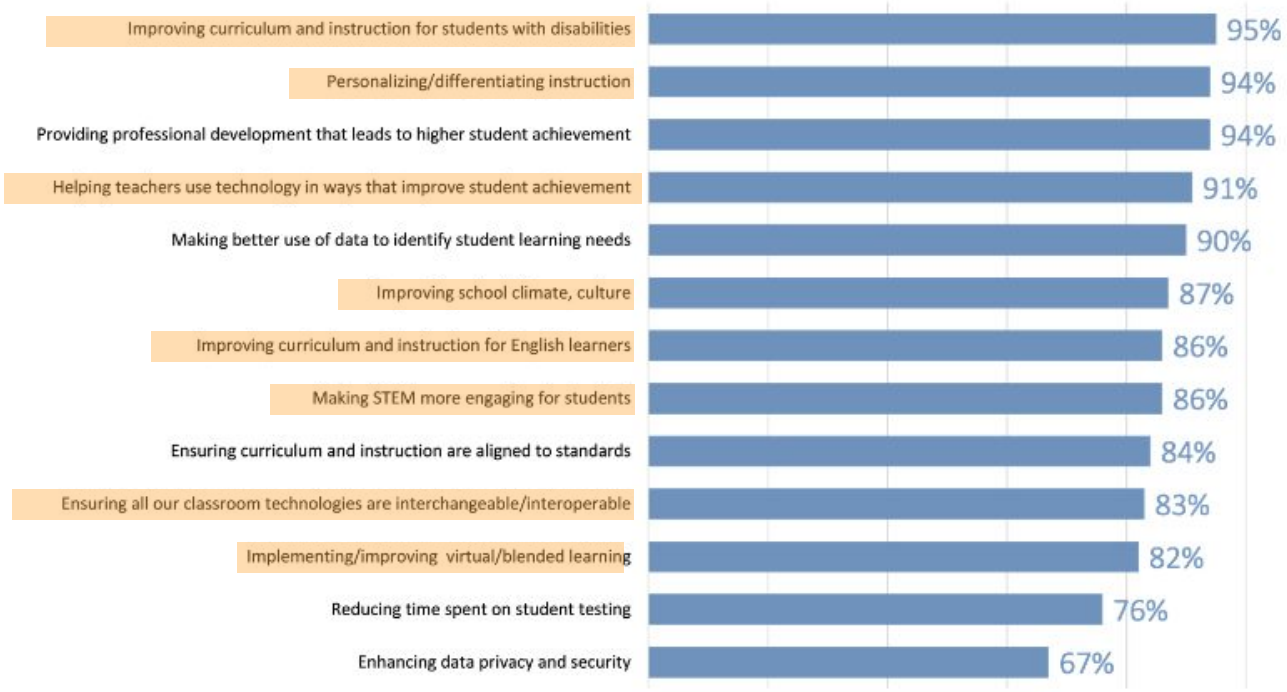
Content Marketing Opportunities

"The list below presents a range of goals that may be relevant for school districts. To what extent do you agree or disagree that your district would benefit from some guidance or expertise to help meet these goals?"



Content marketing opportunities re: video/boclips:

- Improving instruction for students with disabilities
- Personalized/differentiated instruction
- Helping teachers use tech to improve student achievement
- Improving instruction for English learners
- Making STEM more engaging
- Aligning instruction to state standards
- Ensuring classroom technologies interchangeable
- Improving virtual/blended learning

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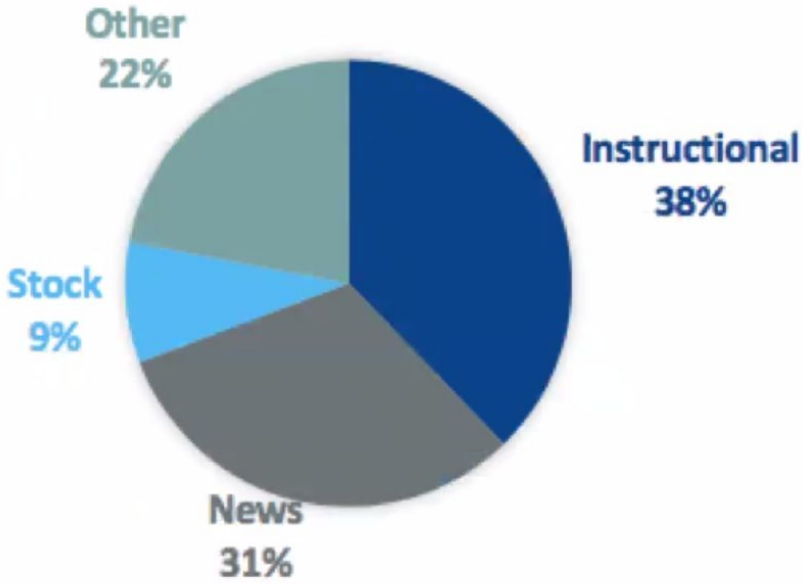
Trends by Channel

APPENDIX

% OF CONTENT TYPES LICENSED FROM 2015



% OF CLIPS SOLD INTO EDUCATIONAL SECTORS FROM 2015 (ROUGHLY!)