Amazon, Apple, Google, & Microsoft: How 4 Tech Titans Are Reshaping The Ed-Tech Landscape
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Education Week Research Center
An on-demand archive of this webinar will be available at www.edweek.org/go/webinar in less than 24 hrs.
Four Companies Battling for Territory in the K-12 Market

Amazon
Apple
Google
Microsoft
A Shifting Ed-Tech Landscape

Digital K-12 adoption increasing, internet connectivity improving:

More school districts are meeting federal connectivity goals.

<table>
<thead>
<tr>
<th>Year</th>
<th>% of school districts with 100 kbps/student internet access</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>30%</td>
</tr>
<tr>
<td>2015</td>
<td>76%</td>
</tr>
<tr>
<td>2016</td>
<td>88%</td>
</tr>
</tbody>
</table>

SOURCE: EducationSuperHighway
A Shifting Ed-Tech Landscape (Continued)

• Gradual, but steady shift from print to digital
• Increasing demand for “personalization,” customization of lessons for students. Two common strategies:
  - A) Broad redesign of courses, school schedules
  - B) Tech platforms that attempt to use algorithms to tailor instruction to student strengths, weaknesses
• Districts face huge pressure to control costs, produce results
The Four Companies: Different Products, Roles in K-12 Market

**Google**: Operating systems (Chromebooks) and classroom productivity suite (G Suite for Education).

**Apple**: Creator of iPads – widely used in schools; Macs; and apps for teachers and students.

**Microsoft**: Operating system, latest is Windows 10S; Office 365, a classroom productivity suite; Learning Tools, a reading and writing app for students; Intune for Education, cloud-based device management.

**Amazon**: Cloud-based storage option gaining K-12 customers – estimated 7,000 users worldwide. Online marketplace for district purchasing; “open” resource platform under development.
Biggest Challenges Facing K-12 Administrators, Teachers

- **Vast array** of technology choices for administrators to make
- **Few empirical ways** to judge tech quality; after years of tech adoption and growth, scant evidence of what works
- **Major challenges** helping train teachers to make effective use of classroom technology
- **Research shows** a lot of tech is not enriching teaching and learning, but reinforcing current tasks, rote skills
A Demand for Simplicity, Functionality

- Schools want the **integration** of new ed-tech products done for them
- Rising demand for “**interoperability**” of tech tools
- Teachers want tools that **lighten their workload**, rather than adding to it
- **Big tech players** often hook teachers by offering products at no cost (G Suite, for example)
Districts Weigh Merits of Low-Cost, Functionality

• Chromebooks’ advantage over Apple, Microsoft: “It’s the price point,” one official said.

• Questions from districts about their memory/capacity

• Broader questions about Google’s data-privacy practices

• Apple touts potential to promote richer, deeper learning

• Microsoft also touts richer student experience, preparation for the workforce
Amazon: The New K-12 Player Everyone’s Watching

- Schools buying through online marketplace, **Amazon Business for Education** – “millions of products” offered
- Many districts now follow lengthy, **strict RFP process** for big purchases; more discretion on smaller buys
- Recent partnership with **U.S. Communities**, national purchasing coop, to allow districts to piggyback, buy through Amazon
- **N.Y.C. schools** strike deal to have company build online marketplace to give educators e-books
Does Dominance of Big Players Stifle Innovation?

• Districts already cautious about trying smaller, untested ed-tech providers

• Incumbent vendors today have huge advantages in K-12 systems

• Big presence of Google, Microsoft may discourage challenges from smaller competitors, some say

• Are the products of Amazon, Apple, Google, and Microsoft truly transformative?
Amazon, Apple, Google, and Microsoft:

How 4 Tech Titans Are Reshaping the Ed-Tech Landscape
Survey Overview

• Nationally-representative online survey

• Survey fielded in March & April of 2017

• 1,000 respondents, evenly-split between:
  
  • Teachers

  • District leaders e.g. superintendents, Chief Academic Officers, Chief Technology Officers, etc. ]
The Role of 8 Companies in K-12 Education
Imagine that you have been asked to hire one of the following companies to help improve student achievement in your school district. Which one would you hire?
Imagine that you have been asked to hire one of the following companies to help improve student achievement in your school district. Which one would you hire?

- Google for Education, 52%
- Apple Education, 13%
- Scholastic Education, 9%
- McGraw-Hill Education, 7%
- Pearson Education, 6%
- Microsoft Education, 6%
- Houghton Mifflin Harcourt, 5%
- Amazon Education, 1%
### Why Would You Hire This Company to Improve Student Achievement in Your School District?*

<table>
<thead>
<tr>
<th></th>
<th>I would hire Google</th>
<th>I would hire a company other than Google</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ease of use of products</strong></td>
<td>25%</td>
<td>16%</td>
</tr>
<tr>
<td><strong>Established provider and known products</strong></td>
<td>24%</td>
<td>30%</td>
</tr>
<tr>
<td><strong>Effectiveness and quality of products</strong></td>
<td>23%</td>
<td>27%</td>
</tr>
<tr>
<td><strong>Innovativeness</strong></td>
<td>18%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Prior use and/or products already in use</strong></td>
<td>15%</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Affordability</strong></td>
<td>12%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Good resources to use with the products</strong></td>
<td>8%</td>
<td>16%</td>
</tr>
<tr>
<td><strong>Customer service</strong></td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Google Dominates Devices, Productivity Tools

**Hardware used most frequently for instructional purposes in US classrooms**

- Chromebook: 42%
- PC laptop: 15%
- PC desktop: 13%
- iPad: 13%
- Apple/Mac laptop: 9%
- Other: 6%
- Apple/Mac desktop: 2%
- Microsoft Surface: 1%
- Amazon Kindle: 0.50%

**Productivity Tools Most Frequently Used in U.S. Classrooms**

- Google G Suite and/or Google Classroom: 68%
- Microsoft Office 365 and/or Microsoft Classroom: 17%
- Apple iWork and/or Apple Classroom: 14%
- We do not use any of these products: 1%
Is Affordability Chromebook’s Only Advantage?

Perceptions of Digital Devices Used Most Frequently in U.S. Schools

- Supports higher student achievement
- Helps boost student engagement
- Affordable
- Easy to use

iPads  PC desktops  PC laptops  Chromebooks
# Google Classroom vs. Microsoft Classroom

## Perceptions of Productivity Tools Used Most Frequently in U.S. Schools*

<table>
<thead>
<tr>
<th>Feature</th>
<th>Google G-Suite and/or Google Classroom</th>
<th>Microsoft Office 365 and/or Microsoft Classroom</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keeps things organized</td>
<td>70%</td>
<td>50%</td>
</tr>
<tr>
<td>Easy to use</td>
<td>68%</td>
<td>57%</td>
</tr>
<tr>
<td>Does what I need it to do</td>
<td>65%</td>
<td>53%</td>
</tr>
<tr>
<td>Helps boost student engagement</td>
<td>59%</td>
<td>59%</td>
</tr>
<tr>
<td>Affordable</td>
<td>57%</td>
<td>57%</td>
</tr>
<tr>
<td>Saves time</td>
<td>56%</td>
<td>53%</td>
</tr>
<tr>
<td>Enables personalized learning</td>
<td>53%</td>
<td>53%</td>
</tr>
<tr>
<td>Integrates with other tools</td>
<td>51%</td>
<td>37%</td>
</tr>
<tr>
<td>Leads to better instruction</td>
<td>51%</td>
<td>31%</td>
</tr>
<tr>
<td>Supports higher student</td>
<td>41%</td>
<td>26%</td>
</tr>
<tr>
<td>achievement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reduces effort</td>
<td>33%</td>
<td>25%</td>
</tr>
<tr>
<td>Private and secure</td>
<td>26%</td>
<td>14%</td>
</tr>
<tr>
<td>Durable</td>
<td>15%</td>
<td>22%</td>
</tr>
<tr>
<td>Glitch-free</td>
<td>13%</td>
<td>7%</td>
</tr>
<tr>
<td>Helpful customer service</td>
<td>10%</td>
<td>6%</td>
</tr>
</tbody>
</table>

*Perceptions of productivity tools used most frequently in U.S. schools, based on survey data.
Results Suggest Continued Chromebook Growth

In the next two years, how do you expect your district’s investment in the following products will change, if at all?*

<table>
<thead>
<tr>
<th>Product</th>
<th>Decrease</th>
<th>Stay the Same</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google Chromebooks</td>
<td>8%</td>
<td>90%</td>
<td>2%</td>
</tr>
<tr>
<td>Apple iPads</td>
<td>22%</td>
<td>45%</td>
<td>33%</td>
</tr>
<tr>
<td>PC lap tops</td>
<td>22%</td>
<td>49%</td>
<td>29%</td>
</tr>
<tr>
<td>Microsoft Surface</td>
<td>19%</td>
<td>55%</td>
<td>26%</td>
</tr>
<tr>
<td>Mac/Apple laptops</td>
<td>21%</td>
<td>55%</td>
<td>24%</td>
</tr>
<tr>
<td>Mac/Apple desktops</td>
<td>37%</td>
<td>51%</td>
<td>13%</td>
</tr>
<tr>
<td>Amazon Kindles</td>
<td>41%</td>
<td>50%</td>
<td>9%</td>
</tr>
<tr>
<td>PC desktops</td>
<td>46%</td>
<td>46%</td>
<td>9%</td>
</tr>
</tbody>
</table>

*Percentage distribution among district leaders
Will Google Use Continue to Expand?

<table>
<thead>
<tr>
<th>Product Category</th>
<th>A lot less</th>
<th>Less</th>
<th>Same</th>
<th>More</th>
<th>A lot more</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chromebooks</td>
<td>3%</td>
<td>18%</td>
<td>30%</td>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>Google tools</td>
<td>15%</td>
<td>41%</td>
<td></td>
<td>43%</td>
<td></td>
</tr>
<tr>
<td>iPads</td>
<td>5%</td>
<td>11%</td>
<td>36%</td>
<td>31%</td>
<td>16%</td>
</tr>
<tr>
<td>Apple apps</td>
<td>4%</td>
<td>11%</td>
<td>41%</td>
<td>30%</td>
<td>15%</td>
</tr>
<tr>
<td>Microsoft Office and other tools</td>
<td>5%</td>
<td>16%</td>
<td></td>
<td>47%</td>
<td>22%</td>
</tr>
<tr>
<td>Houghton Mifflin Harcourt products/services</td>
<td>4%</td>
<td>5%</td>
<td>55%</td>
<td>32%</td>
<td>5%</td>
</tr>
<tr>
<td>McGraw-Hill Education products/services</td>
<td>5%</td>
<td>12%</td>
<td>66%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Pearson Education products/services</td>
<td>5%</td>
<td>15%</td>
<td>61%</td>
<td>14%</td>
<td>5%</td>
</tr>
<tr>
<td>Amazon products/services</td>
<td>4%</td>
<td>5%</td>
<td>55%</td>
<td>32%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Coming Soon in *EdWeek Market Brief*

- Administrators’ experiences purchasing from the 8 companies

- Segmentation by demographics, district characteristics

- Additional analyses, including Net Promoter Scores and branding

- More information: [https://marketbrief.edweek.org/](https://marketbrief.edweek.org/)
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Required Reading from Education Week:

Amazon, Apple, Google, and Microsoft Battle for K-12 Market, and Loyalties of Educators
Amazon, Apple, Google, and Microsoft sell different products in the K-12 market, but they collectively play a huge role in shaping the ed-tech landscape.

Download the Exclusive Data Report
This free research report includes results of a national survey on educational technology companies, their products, and their positions in the K-12 market.