

THE DIGITAL TRANSFORMATION OF EDUCATION

2017 Trends in U.S. K-12 Schools
Research by Kahoot!

Insights from our fast-growing platform:

50M monthly active users

2M U.S. teachers

25M U.S. students

20M public kahoots

HIGHLIGHTS FROM Q1 2017

1

GOOGLE GAINING GROUND IN THE CLASSROOM

Google's Chrome OS continues to gain overall market share in U.S. classrooms at the expense of iOS. Chrome OS is the clear market leader on computers, while Apple's iOS platform continues to dominate on mobile devices in U.S. schools. Google Classroom is the most popular productivity suite in U.S. classrooms.

2

TECH ADOPTION IS ALL ABOUT PRODUCTIVITY

Without doubt, the No. 1 reason teachers and administrators adopt technology is to increase student efficiency and productivity. Connecting students' everyday lives with classroom lessons and providing useful data for assessment are also important drivers of digital platform adoption in U.S. classrooms.

3

RAPID EXPANSION OF DIGITAL PLATFORMS

Digital platforms are getting more popular in U.S. classrooms. Educators use them for teaching, assessment and personalized learning. Other top trends include computational thinking, coding, and increased understanding of data.

INTRODUCTION

Education technology is a rapidly growing industry expected to hit \$252 billion globally* by 2020, with the U.S. currently leading all other nations in EdTech spending.

What's up with EdTech?

EdTech is poised to be among the biggest and most profitable digitized sector yet. More and more educational institutions are getting on board with this transformation. Working with today's digitally native students, they're willing to upgrade the classroom technology to cater to the learners' habits and needs.

Kahoot!'s Reach

Kahoot!, one of the world's fastest-growing learning platforms, is a popular technology used by teachers and students inside and outside the classroom — especially in K-12 environments. The company recently announced it has grown to 50 million monthly active users and has had more than 1 billion cumulative players since it launched in 2013. More than two-thirds of Kahoot! users, 32 million to be precise, are in the U.S.

Resource for the Learning Community

The Kahoot! platform has a wealth of data on classroom technology trends and the needs and challenges of educators and students. Using information from Kahoot!'s platform and Kahoot!-led surveys with educators, EdTech influencers and publications, Kahoot! is launching its first Kahoot! EdTrends Report. This quarterly report will highlight trends in education tech, top technologies and tools used in a classroom, challenges and needs of educators in the form of data and an interview with an educator. The report's goal is to serve as a useful resource for the learning community worldwide.



TREND #1: GOOGLE IS GAINING GROUND IN U.S. CLASSROOMS

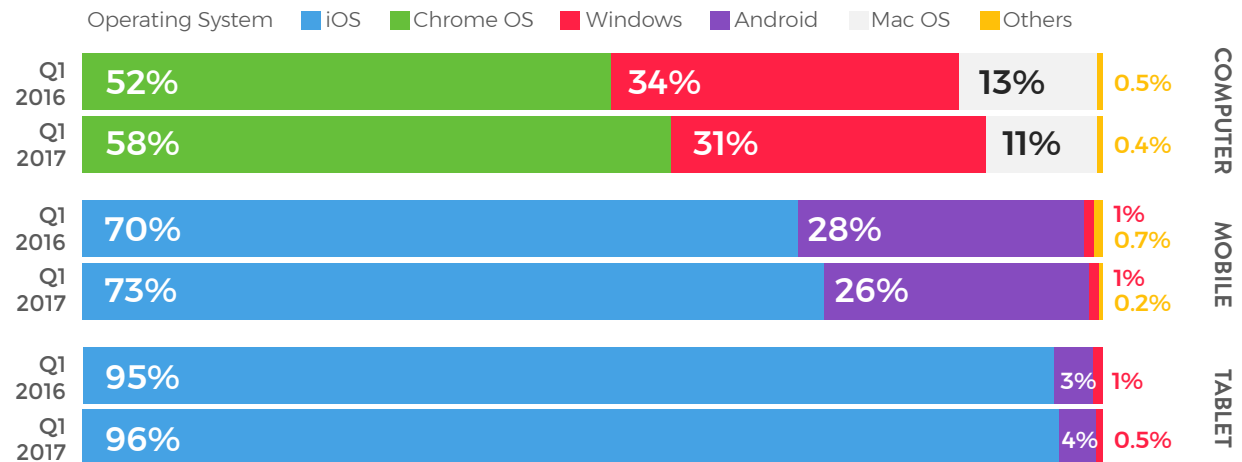
Chrome OS expands on computers; iOS still dominates on mobile and tablets

Chrome OS share is increasing on computers in the U.S., comprising 58% share in Q1 2017.

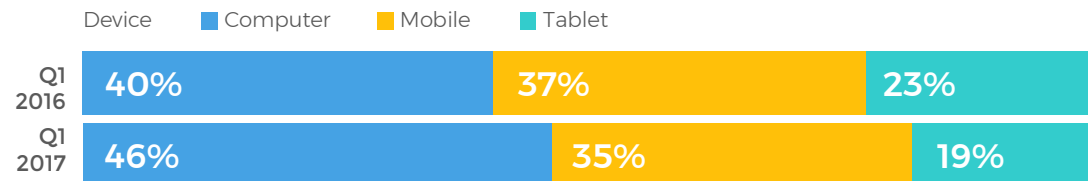
On mobile, iOS continues its dominance, with 73% share in Q1 2017 versus 70% in Q1 2016. On tablets, iOS also remains very strong, as the iPad makes up 96% share of tablet share, slightly more than in Q1 2016.

Overall computer usage in U.S. classrooms increased by 6 percentage points to 46% year-over-year in Q1 2017, while mobile and tablet usage dropped 2 and 5 percentage points, respectively. This indicates that U.S. schools are investing more in computers for students and teachers, at the expense of tablets.

BREAKDOWN OF KAHOOT! SESSIONS BY OS (U.S. & CANADA Q1 2017)



BREAKDOWN OF KAHOOT! SESSIONS BY DEVICE USAGE (U.S. & CANADA Q1 2017)

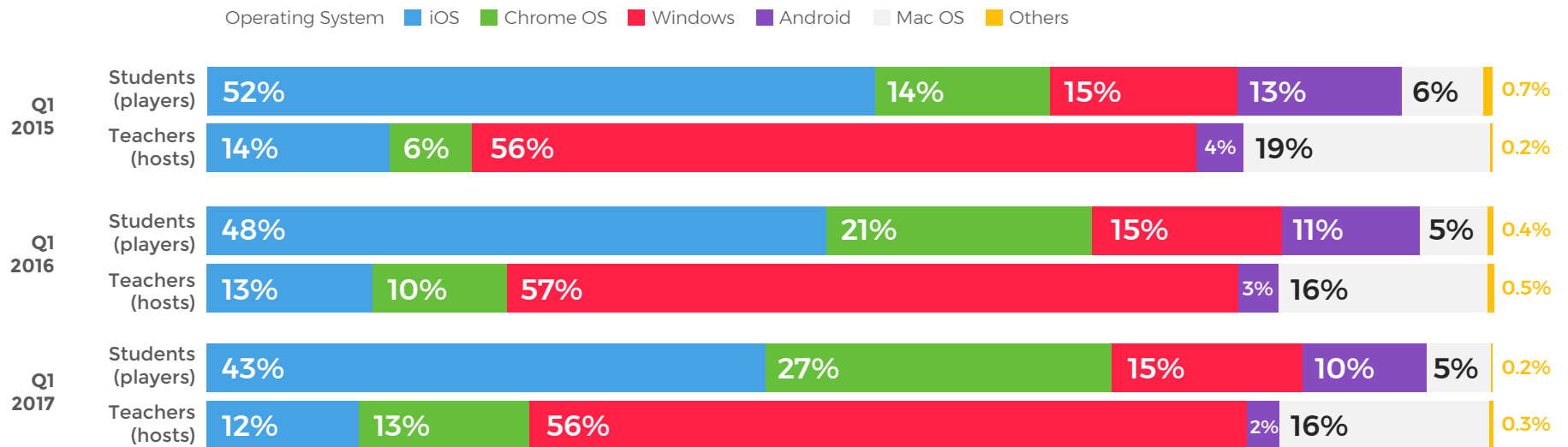


CHROME OS PICKS UP SPEED AMONG STUDENTS AND TEACHERS iOS losing share, Microsoft holds steady

When looking at usage between teachers and students in U.S. classrooms, a key finding was that Google's Chrome OS is increasingly becoming the OS choice of U.S. schools, particularly for students, with its share almost doubling in two years (from Q1 2015 to Q1 2017) at iOS' expense.

As Google gains share at Apple's expense, Microsoft continues to be the preferred choice of U.S. schools for teachers with 56% share in Q1 2017, but a lower share with U.S. students.

BREAKDOWN OF U.S. KAHOOT! SESSIONS BY OS (TEACHERS VS. STUDENTS)



GOOGLE CHROMEBOOK AND GOOGLE CLASSROOM RANK NO. 1: SURVEY DATA
Microsoft Windows remains a popular OS with teachers

In a survey conducted in May 2017, we asked nearly 600 U.S. educators about the devices they and their students use in the classroom. The No. 1 device for both, as the survey discovered, was the Google Chromebook.

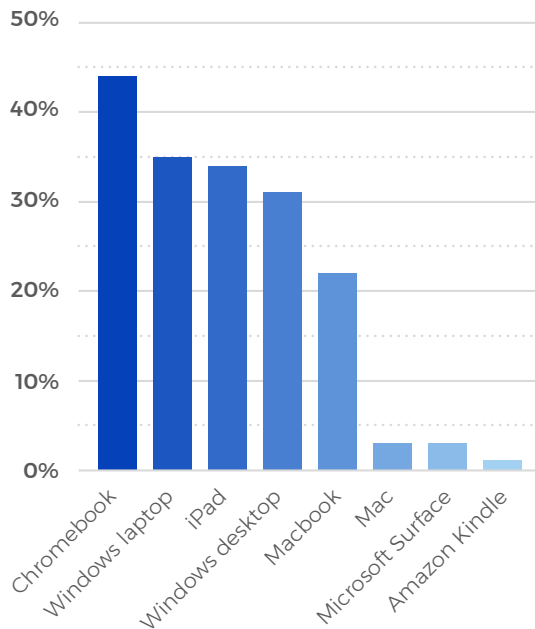
Chromebook had the highest number of users among teachers (44%) and students (46%). Windows laptop was the second most popular choice among teachers and iPad was second among students.

Google's productivity suite (G Suite or Classroom) was the most widely used productivity suite in U.S. Classrooms: 57% of

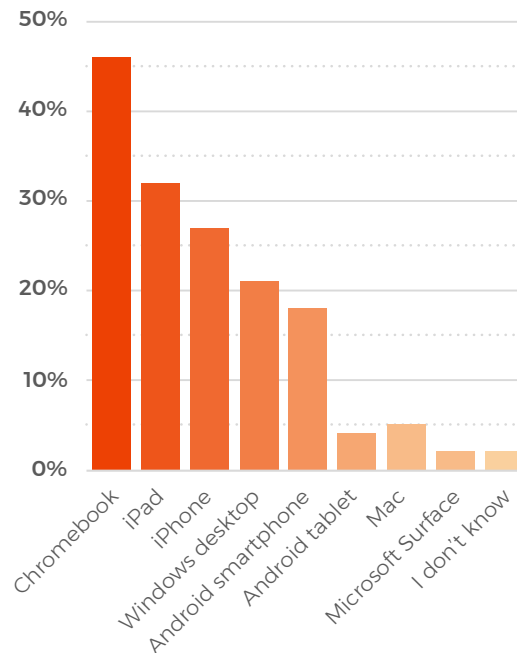
respondents said they use it and 23% use Microsoft Office 365.

Based on the survey results, Microsoft is still the dominant operating system on computers in U.S. schools among teachers (consistent with Kahoot! data on page 4), with Chrome OS catching up quickly. According to the survey, 42% of teachers said they use Microsoft Windows for their own computers, while 41% of survey respondents said they use Chrome OS and 15% MacOS. (This data is not shown in graphical format).

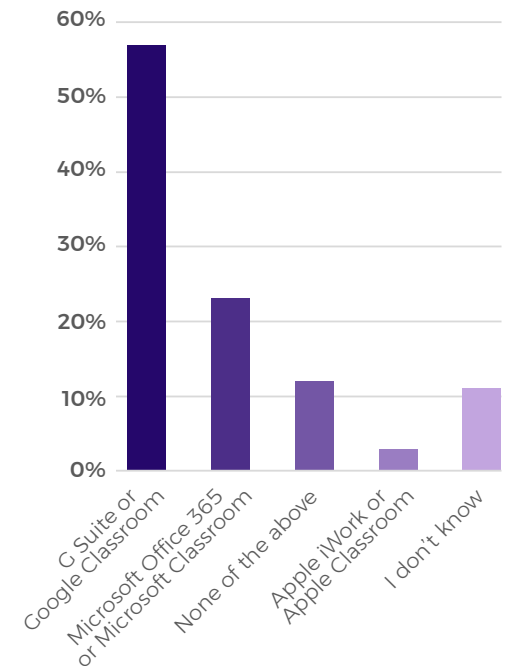
TOP DEVICES USED BY TEACHERS (SURVEY DATA)



TOP DEVICES USED BY STUDENTS (SURVEY DATA)



TOP PRODUCTIVITY SUITES USED IN EDUCATION (SURVEY DATA)



TREND #2: FOCUS ON PRODUCTIVITY FUELS EDTECH ADOPTION

Digital platforms and personalized learning are key to this effort

In the EdTrends survey, most respondents mentioned student productivity as the top reason to use education technology.

It's all about the efficiency

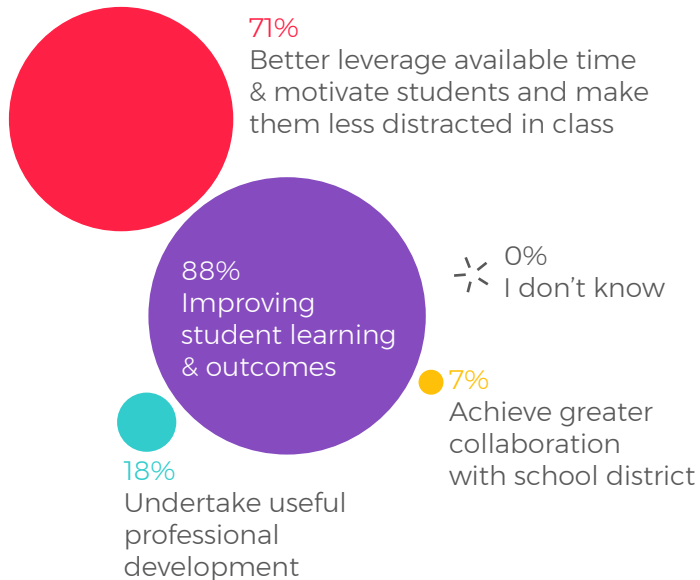
Today's educators are implementing technology not just for the sake of it, but because these tools improve student performance, maximize time, motivate students and lead to fewer distractions in the classroom. The latter was one of the top priorities for educators.

"Kids are at the center of who we are and what we do," says

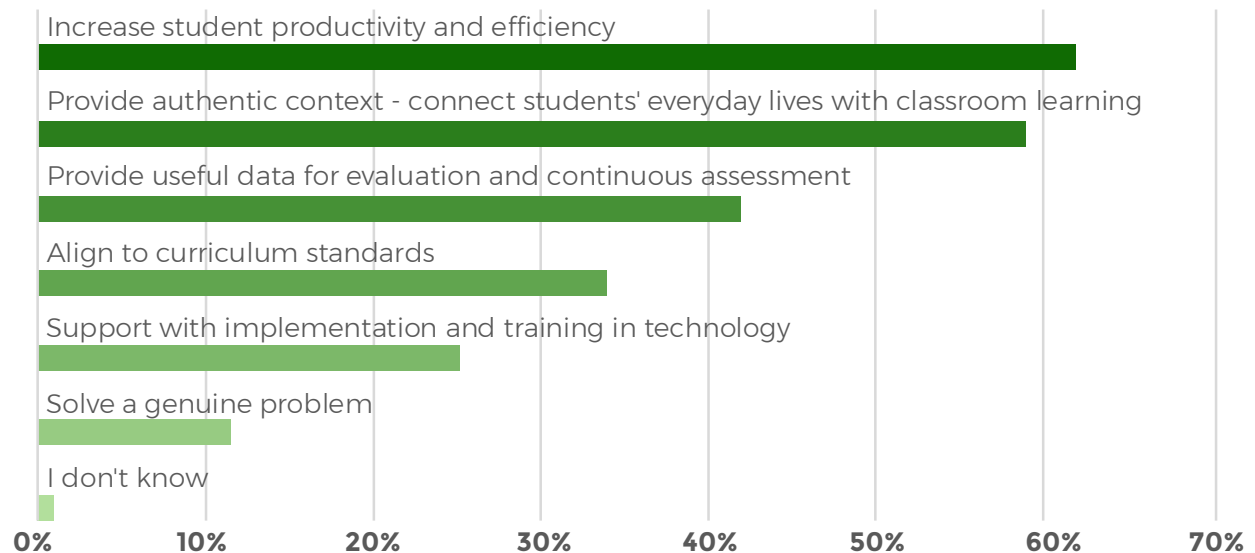
Sean Gaillard, principal at Lexington Middle School in North Carolina. "How is this best serving kids? Is this going to be inspirational to students? It's not about the tool; it's about the approach and how to harness it in an innovative, positive school environment."

Connecting students' everyday lives with classroom learning and providing useful data for evaluation and continuous assessment were also highlighted by teachers as top EdTech priorities for 2017-2018.

WHAT ARE YOUR KEY EDUCATIONAL PRIORITIES FOR THE YEAR 2017-2018?



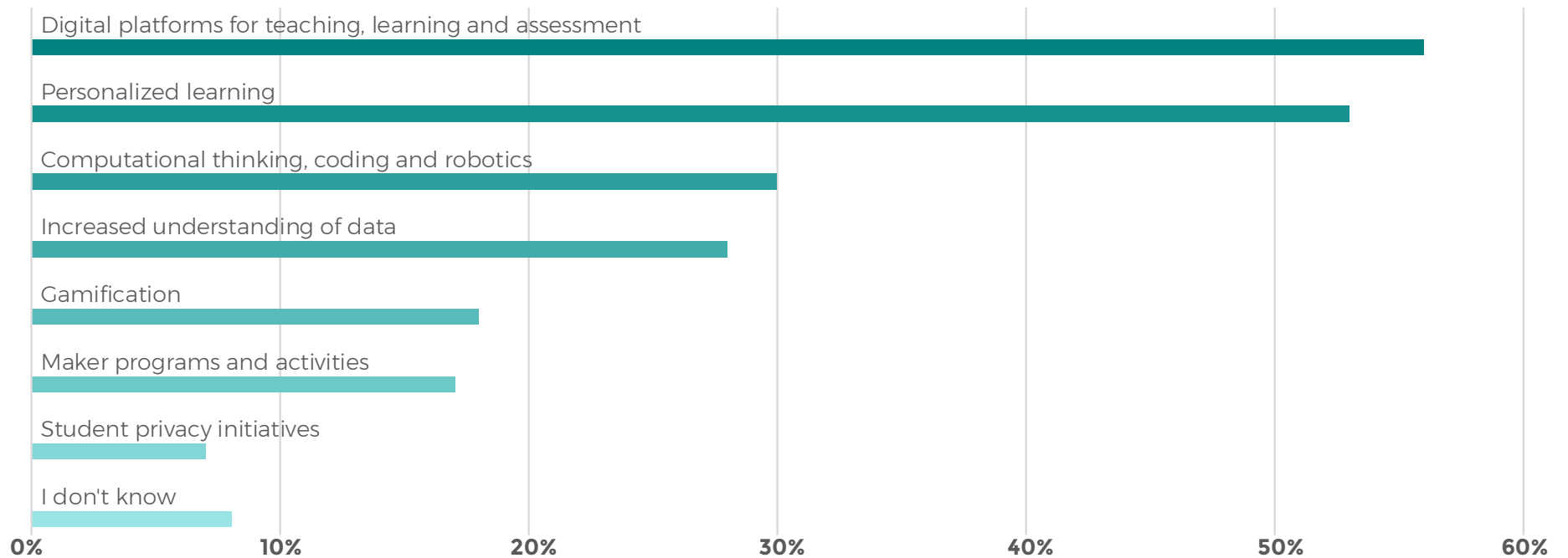
WHAT ARE YOUR TOP EDUCATION TECHNOLOGY PRIORITIES/NEEDS FOR THE 2017-2018 SCHOOL YEAR?



TREND #3: DIGITAL PRESENCE EXPANDS RAPIDLY IN U.S. SCHOOLS
Educators predict use of digital platforms for teaching, learning and assessment

When asked what trends they see in EdTech for the coming school year, 56% of respondents say digital platforms for teaching, learning and assessment; more than half say personalized learning. About a third say computational thinking, coding and robotics will be big in the coming school year and 28% believe increased understanding of data will be an EdTech trend this year.

WHAT TRENDS ARE YOU SEEING IN EDUCATION TECH IN THE UPCOMING SCHOOL YEAR ACROSS YOUR DISTRICT?

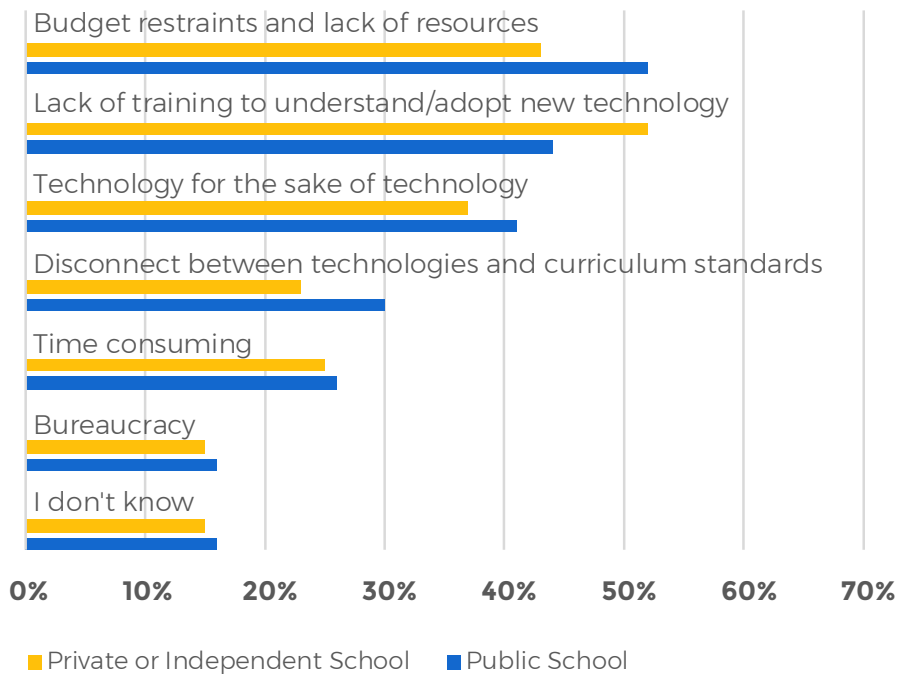


TREND #4: PUBLIC SCHOOLS' WOES ARE BUDGET; PRIVATE SCHOOLS NEED TRAINING

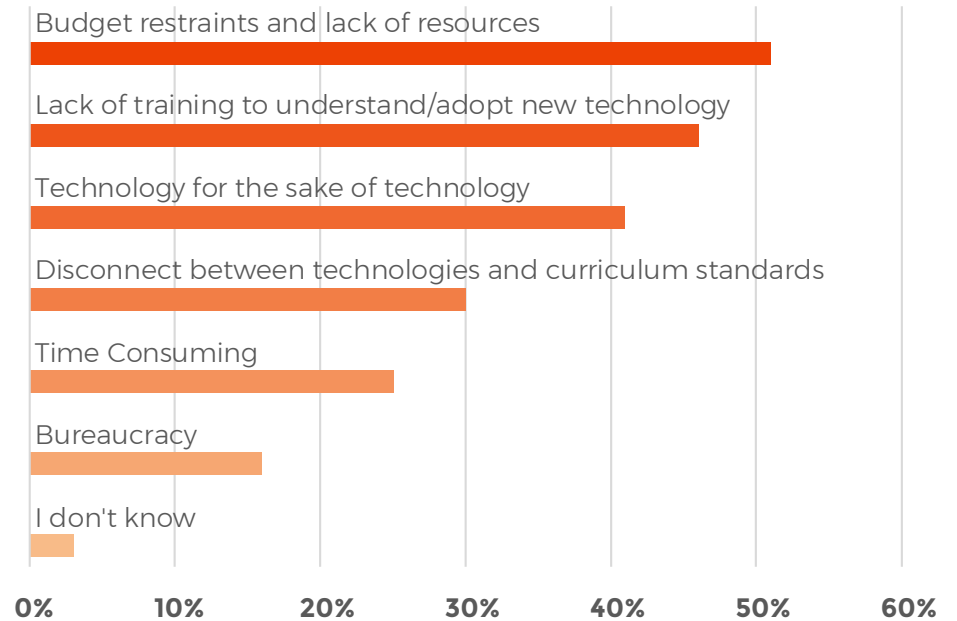
Based on responses of U.S. educators in the survey, the biggest hurdle in implementing education technology for public school teachers is the lack of budget and resources. While that remains a significant problem for private school teachers as well, for them the larger problem is lack of training for them to understand and adopt new technology.

WHAT ARE THE CHALLENGES YOU ARE SEEING IN EDUCATIONAL TECHNOLOGY AND IMPLEMENTING IT SUCCESSFULLY IN YOUR JOB?

RESPONSES BY TYPE OF SCHOOL



COMBINED RESPONSES

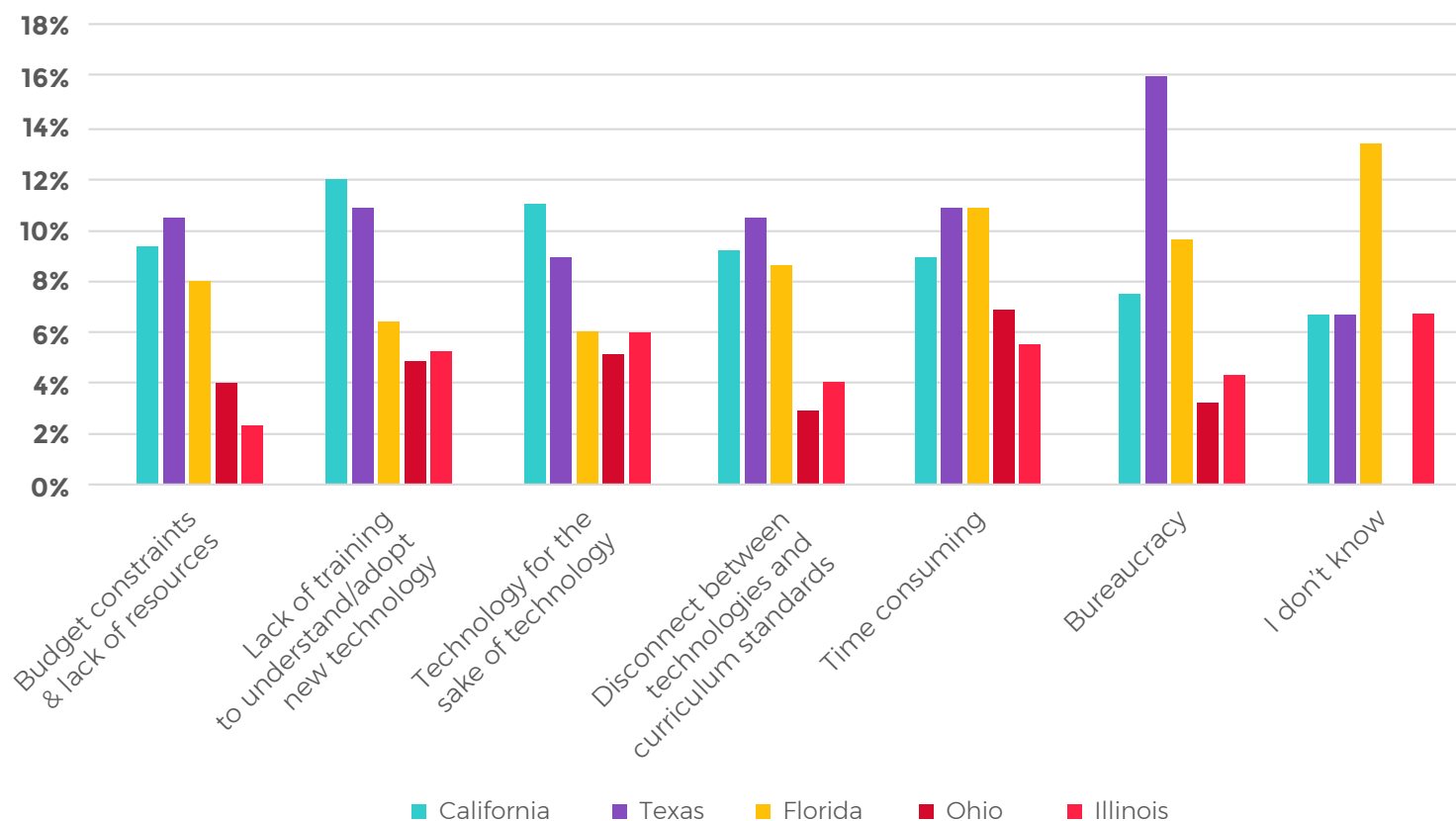


CALIFORNIA STRUGGLES WITH LACK OF TRAINING; TEXAS GRAPPLES WITH BUDGET CONSTRAINTS AND BUREAUCRACY

In the EdTrends survey, California teachers said lack of training and “technology for the sake of technology” are the biggest challenges in education technology and implementing it successfully in their jobs. "There are so many options and EdTech tools," says Cynthia Roque, a 4th grade teacher in Northern California. "A lot of work and time goes into learning about the technology itself and then teaching it to students, so I try to stick to the ones that are most effective for student learning."

Educators in Texas have a different problem to solve. A significantly large number of teachers said their challenge was bureaucracy and lack of budget and resources.

WHAT ARE THE CHALLENGES IN EDTECH AND IMPLEMENTING IT SUCCESSFULLY IN YOUR JOB?

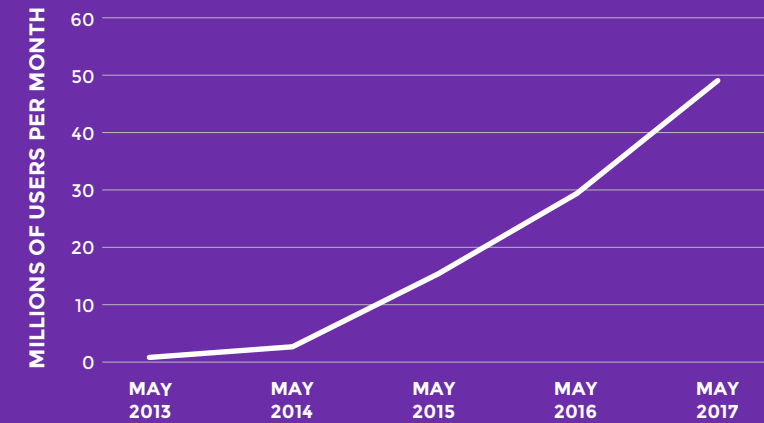


KAHOOT! UNLEASHES GLOBAL LEARNING AND GROWS FAST!

Top educational searches on Kahoot! in Q1 2017 in the U.S.:

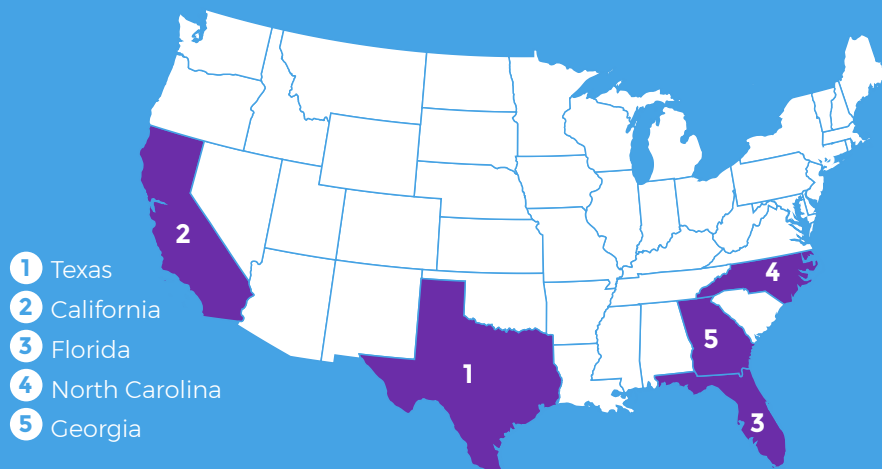


Kahoot! monthly active users



TOP 5 U.S. STATES

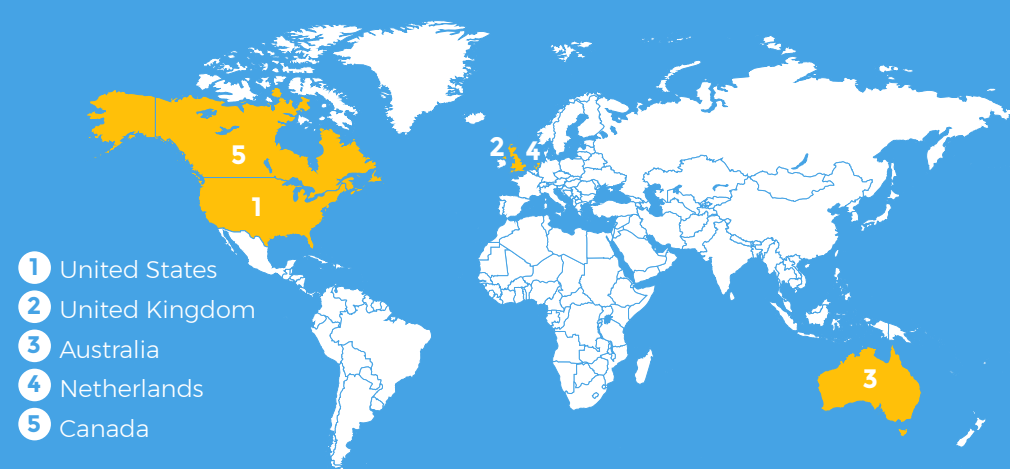
where Kahoot! is played



*by participating players

TOP 5 COUNTRIES

where Kahoot! is played



*by participating players



EDTALKS: BEHIND THE NUMBERS AN EDUCATOR'S PERSPECTIVE

Q&A with Sean Gaillard, principal at Lexington Middle School
in Lexington, North Carolina

Data can say a lot, but many of the nuances, joys and challenges of educators only can come from anecdotal experiences. Every quarter, Kahoot! will interview an educator in our “EdTalks” section and talk to them about their experiences, needs, goals and challenges.

In this installment, Kahoot! interviews Sean Gaillard, principal at Lexington Middle School in North Carolina. Sean has spent most of his 25-year career in education teaching English in middle and high school and has served as principal in two other schools.

Q: What are your educational priorities for the coming school year?

A: Building a positive school culture is a big priority for me. It's all about having a clear vision, bringing in innovative ideas, building teacher voice, leadership and capacity and increasing parental and community involvement.

It's also about changing the approach to learning and teaching, and trying something out of the box — not just lecturing. For example, playing Kahoot! or having our students do Google Hangouts with kids in a different country. All this has to be tied to a very clear vision that everyone understands.

My second priority is making sure we have the right teachers in the right spots. Research shows the single most important factor in student achievement is the teacher. My responsibility is to make sure teachers have what they need and gently push, inspire and encourage students to achieve and be part of what I feel is the

noblest of all professions.

Q: When it comes to technology, what is important for you and your school in the coming year?

A: It all comes down to this: putting kids at the center of who, what and why we do. My question is how is this best serving kids? How does this keep our kids at the center. To make that happen, you have to have a culture in the school community and classroom that exudes that.

For EdTech, it's not just about the tool. It's about the approach and how you use it to create an innovative, positive school environment. Some questions we ask while evaluating EdTech are: Does this align with teaching? Does it align with standards? Is it going to be inspirational for students? Does it align with the already existing tech framework; is it device agnostic?

It has to be affordable and sustainable with a capital S. It can't be outdated. It should be something we can't live

“ For EdTech, it’s not just about the tool. It’s about the approach and how you use it to create an innovative, positive school environment. ”
- Sean

without and it has to grow with our needs. Finally, it shouldn’t exploit the school – it shouldn’t be just a profit on the ledger or a commission for somebody. It has to be sincere.

Q: What trends are you seeing in EdTech in the upcoming school year across your district?

A: Augmented and virtual reality is big – the ability to take virtual field trips and take students to a different place virtually. Maker spaces also are trending. They give students the opportunity to create, tinker and extend their thinking beyond the confines of the classroom. Coding is huge, too.

A big need for us is capturing data with certain formative assessment tools and using that data to drive and differentiate instruction. For example, ClassFlow and Kahoot! are great assessment tools. Also, any tools that promote collaborative thinking and collaboration among teachers and students, like Google Docs, will be important in the coming year.

Q: What are the challenges you are seeing in educational technology and implementing it successfully in your job?

A: I would say a big challenge with technology is the implementation gap. Typically, we do the pilot and have the

feel-good activity, but then it sits, lies dormant and becomes outdated, unfriendly and not useful. It comes down to providing training and implementation and the professional development and the vision that supports these tools.

Budget constraints are another obvious hurdle. There are some great things out there that I know I can never touch. The Kahoot! model, in terms of cost, is nirvana. Ideally, I can get something for free for a school, but I’m also prepared for an affordable cost that is going to dignify the school budget process.

Q: What is your advice to today’s educators and teachers?

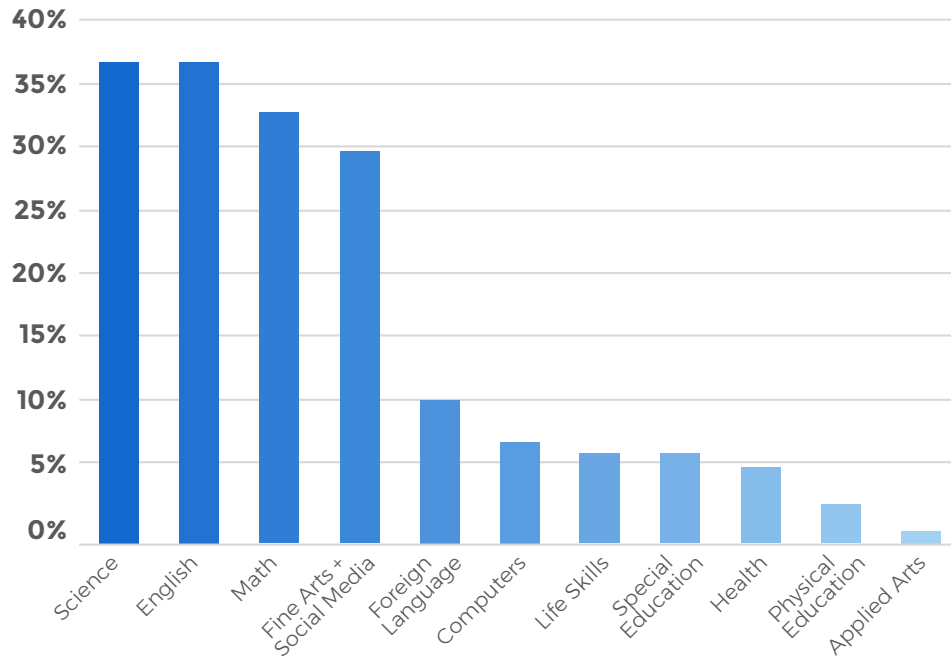
A: I would say that we do life-changing work, and it’s important we believe we aren’t alone in this profession. It’s a collaborative process and we need to lean on each other, take back our own learning and participate in things like Twitter chats. There is a whole professional learning network that’s free and easy so they can sharpen their learning. My biggest advice to any new teacher is that it’s OK to collaborate and work with other educators.

METHODOLOGY

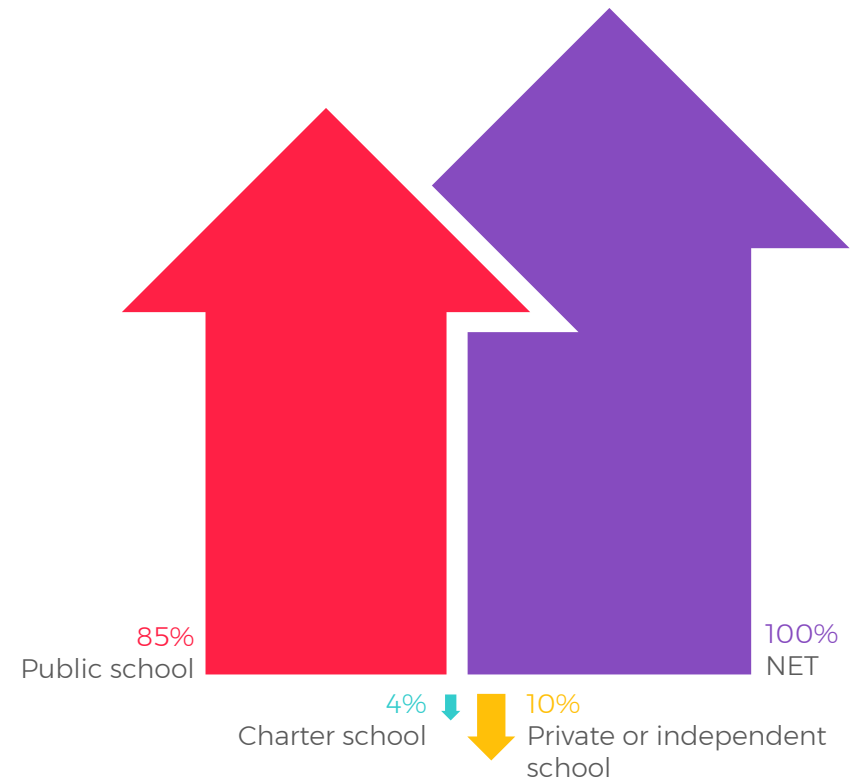
This report is based on data from Kahoot! platform and a survey with 580 U.S. teachers, conducted in May 2017. Additionally, we used third-party data from EdTechXGlobal.

KAHOOT! SURVEY: WHO WERE THE RESPONDENTS?

WHICH OF THESE BEST DESCRIBES THE SUBJECT(S) THAT YOU TEACH?



WHAT BEST DESCRIBES THE SCHOOL WHERE YOU TEACH?



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