The Shift to Digital: 2013

Description: Over the past seventeen years, Education Market Research has conducted dozens of large-scale national surveys of educators, resulting in a longitudinal database of information on teacher habits and preferences with respect to all aspects of K-12 curriculum and instruction. Typically, EMR's findings have included many instances where the market appeared to be resisting change.

Most recently, however, EMR has been detecting a significant market shift in the direction of digital. So much so that we now believe the calendar year 2009 may go into the history books as the year the balance finally shifted from primarily print to primarily digital in the K-12 school market!

The evidence backing up this bold statement comes from multiple surveys: EMR's Supplemental Products Market: 2012 survey, conducted in the Summer 2012, and EMR's most recent Reading Market survey, conducted in the Fall 2011. Supporting evidence also comes from EMR's recent surveys of the Science/STEM, Mathematics and Social Studies market segments. According to all of this recent empirical evidence, digital resources, and the companies producing them, are growing much faster than the K-12 school market as a whole.

For example, among the 110 companies analyzed in EMR's 2012 supplemental market industrysurvey, the most frequently cited product medium for delivering supplemental products was online/digital delivery (68.5%), followed by print (67.6%), software on CD or DVD (46.3%), interactive whiteboards (29.6%), manipulatives (26.9%), face-to-face (25.9%), video-hard copy (25.0%), e-Reader/mobile devices (20.4%), hardware/equipment/ furniture (20.4%), mixed media (14.8%), and supplies (14.8%). As the following table illustrates, the frequency of product delivery via online/digital showed big growth spurts on the 2009, 2010 and 2011 surveys, while print also showed a significant gain compared to 2010 and earlier.

Clearly the publishers have been rapidly shifting their product development activities in the direction of digital. This report provides specifics on that shift in the context of the four core curriculum areas: Science, Reading, Mathematics, and Social Studies.

Contents:

TITLE PAGE

TABLE OF CONTENTS

INTRODUCTION: THE COMING OF AGE OF DIGITAL RESOURCES

COMPARING “HIGH DIGITAL” AND “LOW DIGITAL” COMPANIES

PRODUCT DEVELOPMENT PLANS AND SALES OF DIGITAL PRODUCTS

SIZING THE MARKET FOR PRE-K - 12 DIGITAL EDUCATIONAL RESOURCES
THE SHIFT TO DIGITAL RESOURCES IN THE SCIENCE MARKET SEGMENT
Mobile Devices
Interactive Whiteboards
Web Sites For Student And Teacher Use
New Internet Technologies

THE SHIFT TO DIGITAL RESOURCES IN THE READING MARKET SEGMENT
Mobile Devices
Interactive Whiteboards
Web Sites For Student And Teacher Use
New Internet Technologies

THE SHIFT TO DIGITAL RESOURCES IN THE MATHEMATICS MARKET SEGMENT
Mobile Devices
Interactive Whiteboards
Web Sites For Student And Teacher Use
New Internet Technologies

THE SHIFT TO DIGITAL RESOURCES IN THE SOCIAL STUDIES MARKET SEGMENT
Mobile Devices
Interactive Whiteboards

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<td></td>
<td>USD 595</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide</td>
<td></td>
<td>USD 1190</td>
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