



# Teaching in a time of change:

How do teachers spend their  
classroom time?







## Context

Judging from the education news headlines over the past several years, it would be hard to escape the conclusion that traditional core curriculum is probably doomed. Major publications continually predict “the death of textbooks,” while the traditional “Big Three” publishers have encountered a wide variety of new competitors. Perhaps the most notable occurrence, which was described as “a potential re-ordering of an important corner of the education market,” was the sale of Pearson’s US K-12 courseware business for \$250 million in early 2019.<sup>1</sup> While the signs for core curriculum have been concerning, the education world is abuzz about the potential of new digital tools, which largely fall into the supplemental space. The acquisition of Renaissance Learning by Francisco Partners in 2018 (for a \$1.7b valuation), the explosive growth of Curriculum Associates, and the success of other players like Newsela, all point to a changing landscape in education.<sup>2,3</sup>

In the eyes of many investors, this is where the market is rapidly heading – but it is worth taking a step back to ask the question: what are teachers actually using in their classrooms? In particular, as many companies introduce subscription-oriented products, and as the tools to track teacher usage of the products districts are purchasing become more widely available, usage will likely become increasingly important.

EY-Parthenon sought to answer this question through extensive primary research with teachers across the country. Our work began by asking 40 teachers from around the country to log an “average week” in terms of classroom and planning materials utilized. Our team then utilized the log data to generate a series of hypotheses, which were then tested in a nationwide, online survey of teachers. The survey was launched in June 2019 and received 836 responses from teachers of all ages, experience levels, grade levels, content areas and school/district types. We asked teachers about the following:

- ▶ Usage of different types of classroom materials (and how this has changed over time)
- ▶ Perception of the effectiveness of different types of materials
- ▶ Habits for sourcing lesson materials and planning
- ▶ Why and how different types of materials are used

From this research, and from our analysis of the data, several key “headlines” emerged, which are shared in this report.

1 “Pearson Sells Its K-12 Instructional Materials Business to Investment Firm,” *Edweek Market Brief website*, <https://marketbrief.edweek.org/marketplace-k-12/pearson-sells-k-12-instructional-materials-business-investment-firm/>, accessed 20 December 2019.

2 “Francisco Partners to Acquire Renaissance,” *Cision PR Newswire*, <https://www.prnewswire.com/news-releases/francisco-partners-to-acquire-renaissance-300641536.html>, October 2019.

3 “Newsela raises \$50M to expand a content repository for K-12 learning that replaces traditional textbooks,” *TechCrunch*, <https://techcrunch.com/2019/03/13/newsela-tcv/>, October 2019.

## Contrary to popular belief, core curriculum materials are still the primary resource that teachers utilize in their classrooms.

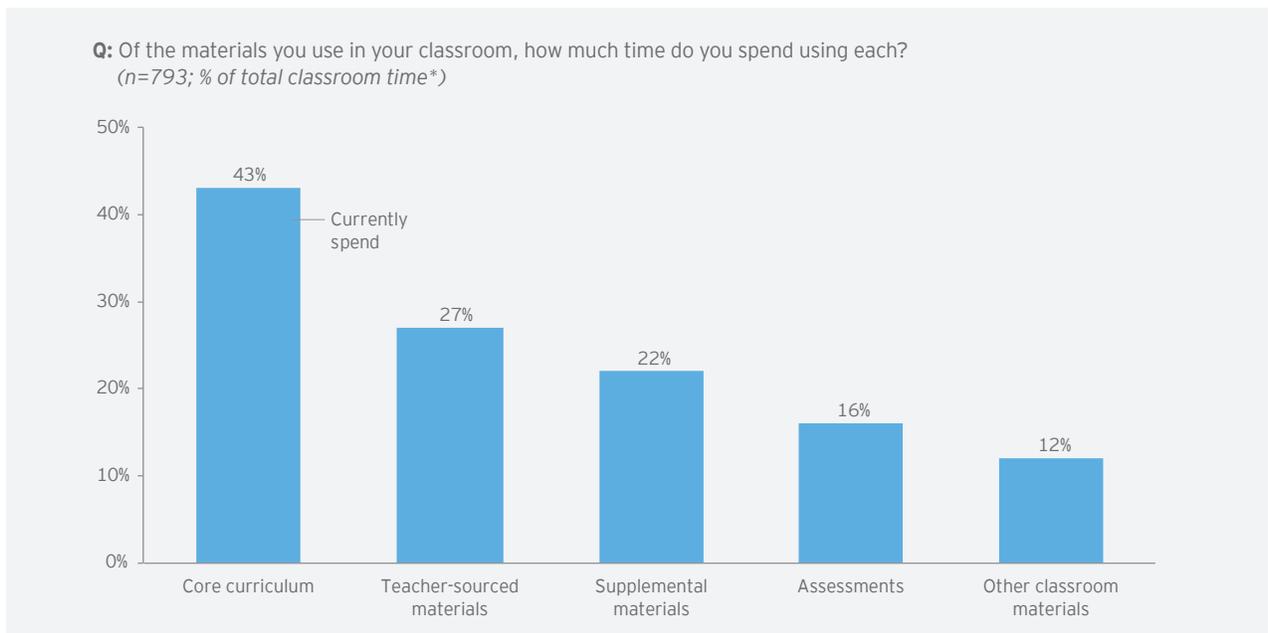
In the data, the most surprising headline was also the simplest: teachers reported that they spend 43% of their classroom time on core curriculum, relative to 27% on materials they had created or sourced themselves (teacher-sourced materials), and 22% on supplemental materials. While the exact allocation of time accorded to core curriculum materials changed slightly when the data was cut by demographics, or by the type of school/

district in which a teacher taught, the headline remained the same: the most time is spent on core.

Furthermore, teachers reported that they turn to core curriculum first in order to source content – ahead of resources from colleagues, free online resources and Google – and that core curriculum is “most important” relative to other materials.

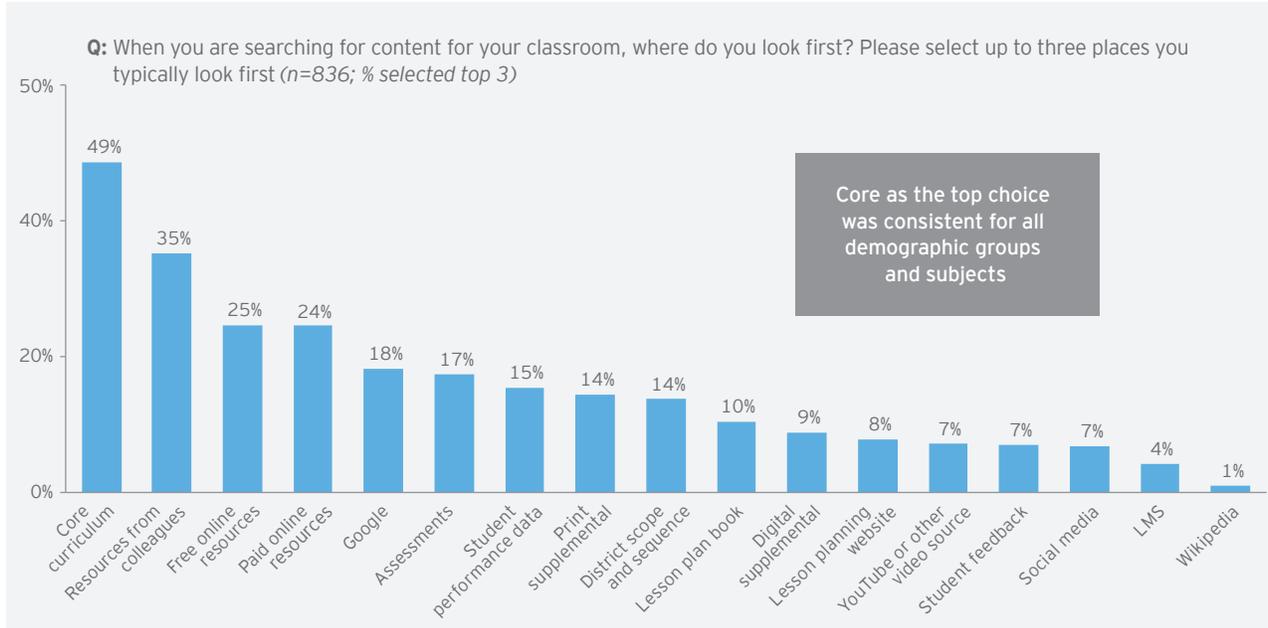
Ultimately, the data made one thing clear: core curriculum is still being used in classrooms, and is still highly valued by teachers, both to use in their classrooms and to plan. Even when asked specifically about textbooks (rather than the general term core curriculum), 69% of teachers – across demographic groups – reported using a textbook at least once a week.

Figure 1: Time spent using classroom materials



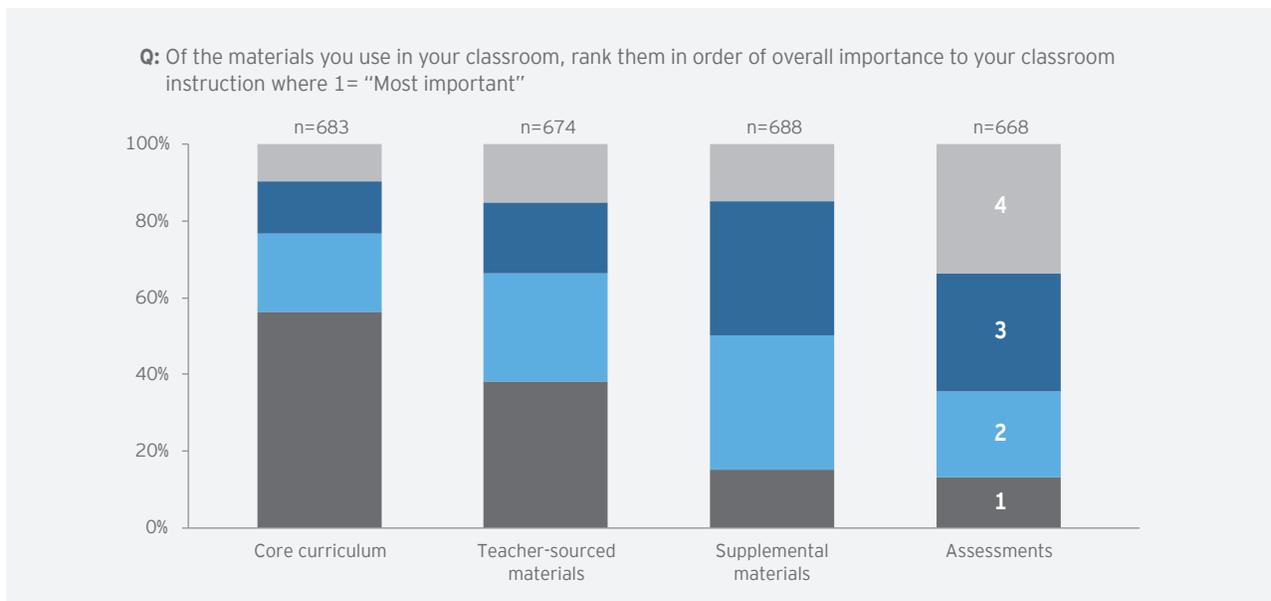
Note: \*All teachers do not use all categories of classroom materials, thus averages across the four categories will sum to larger than 100%.  
Source: EY-Parthenon teacher survey (June 2019).

Figure 2: Sources of content



Source: EY-Parthenon teacher survey (June 2019).

Figure 3: Importance of classroom materials\*



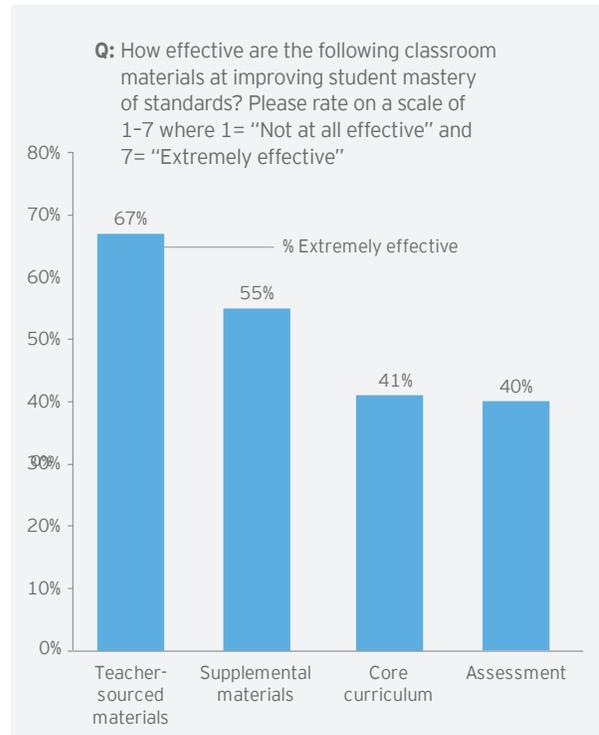
Note: \*Population only includes respondents who indicated they use each of the classroom materials, which explains difference in bar totals.  
 Source: EY-Parthenon teacher survey (June 2019).

## However, core curriculum's position is not necessarily safe in the long term

The survey data left little doubt of current usage of core curriculum – but teachers across demographic groups have a different view on the effectiveness of classroom materials. Here, teachers resoundingly rated core curriculum behind teacher-sourced materials and supplemental materials in terms of effectiveness – 67% of teachers believe that teacher-sourced materials are “extremely effective,” while 55% said the same for supplemental. However, only 41% of teachers reported that core curriculum is “extremely effective.” This was supported by other survey responses – for example, teachers currently spend 43% of their time on core curriculum, but say they would “prefer to spend” less (38%). While this gap is small, it is telling that teachers report that they would prefer to spend more time on teacher-sourced materials and supplemental materials.

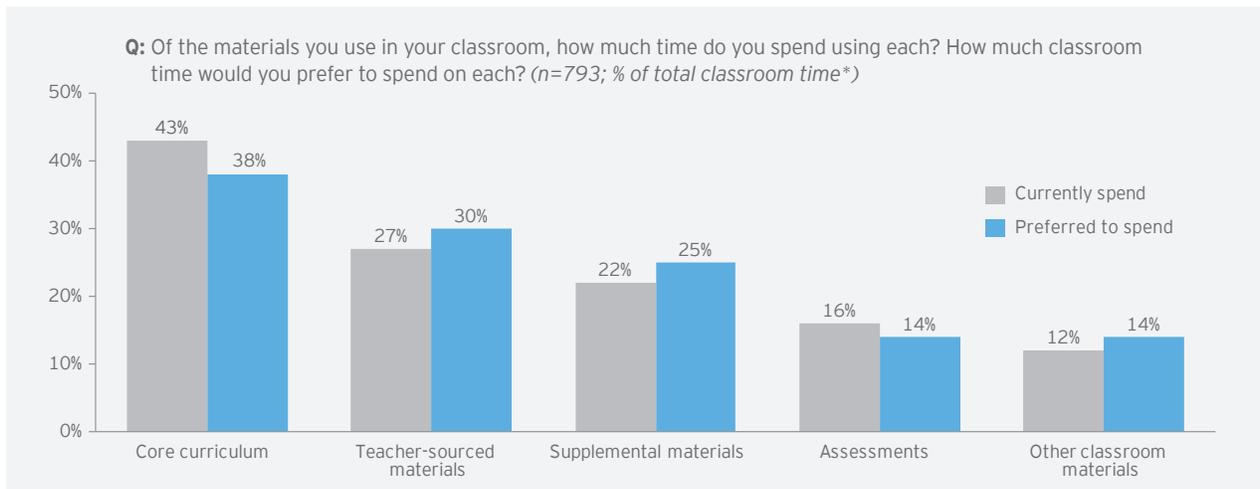
All of this raises an important question: how can we tie out these two headlines? Why are teachers still using core materials in their classroom if they do not find these materials to be as effective as the materials they source themselves, or as effective as the supplemental materials to which they often have just as much access?

Figure 4: Effectiveness of classroom materials\*



Source: EY-Parthenon teacher survey (June 2019).

Figure 5: Time spent using classroom materials



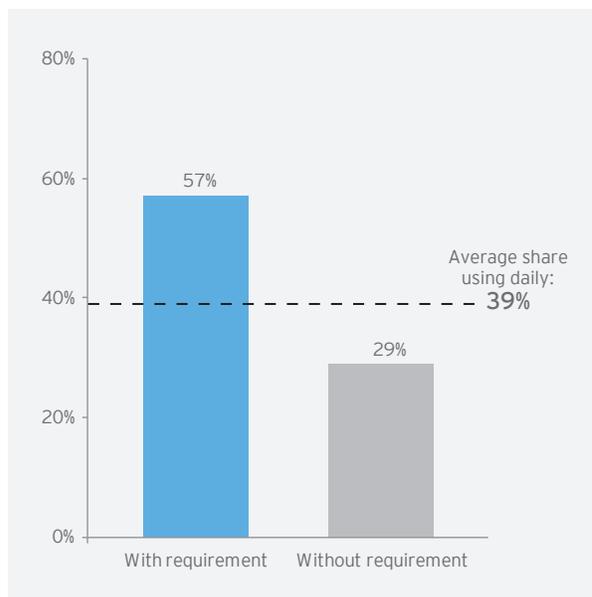
Note: \*All teachers do not use all categories of classroom materials, thus averages across the four categories will sum to larger than 100%. Source: EY-Parthenon teacher survey (June 2019).

## A substantial amount of core curriculum usage appears to be driven by district requirements

The survey data clearly indicates that something beyond effectiveness and teacher preference is driving the high amount of core curriculum usage still reported across classrooms. One factor in this discrepancy is the presence of district usage requirements. Specifically, among teachers with a district requirement, 57% reported utilizing core curriculum daily – compared with 29% of those without a requirement.

Our team utilized cluster analysis – the task of grouping a set of survey respondents in such a way that those in the same group (a cluster) are more similar to each other than those in other groups – to further parse the effect of the requirement. This technique, which can surface similarities that are sometimes hidden by averages, surfaced four distinct clusters:

Figure 6: Share of teachers using **core curriculum daily** by school/district frequency requirement



Source: EY-Parthenon teacher survey (June 2019).



### Kitchen Sink Planners (31% of respondents)

These teachers use all types of instructional materials to plan for their classes, demonstrating equal usage of everything from core curriculum to free online resources.



### Nonstandard Planners (22% of respondents)

These teachers primarily utilize online resources (both paid and free), as well as resources from peers, considerably more often than they utilize core and supplemental materials.



### Independent Planners (17% of respondents)

These teachers have relatively low usage of all types of materials to prepare in their classrooms. However, they tend to lean slightly more on core curriculum, resources from colleagues and results from assessments.



### Traditional Planners (30% of respondents)

These teachers prioritize core curriculum when planning lessons, as well as print supplemental materials and results from assessments. They place less of a premium on digital supplemental and online tools.

A full breakdown of the characteristics of each cluster can be found at the end of this report. As it pertains to the usage of core, three of the clusters are the most revealing:

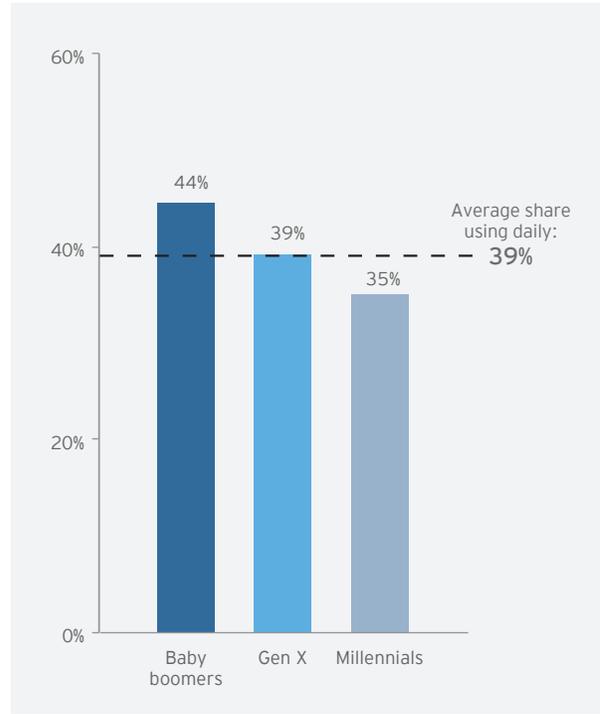
 **The Kitchen Sink** planners do utilize core frequently – and report spending 36% of their classroom time on core. However, 65% of the teachers in this category report having a district core requirement usage, suggesting that the inclusion of core in the “kitchen sink” may be heavily motivated by the requirement.

 **Independent Planners** generally do not have a district requirement, but this group is considerably more tenured than other teachers. This confirms a theme found throughout our survey data that members of the Baby Boomer generation tend to use core more than millennials and Gen Xers. As these teachers begin to retire, this could cause difficulties for the usage of core.

 **The Traditional Planners** perhaps offer the most hope – these teachers spent 44% of their classroom time on core, although 46% of this group reports having a core usage requirement.

Overall, evidence suggests that much of today’s current usage of core curriculum is motivated by district requirements. But this finding does not portend the immediate collapse of core curriculum. To begin with, the requirement appears to be very effective at driving usage. And it is unlikely that districts will abandon this requirement en masse, given that the “baseline level of knowledge” offered by core offers an attractive value proposition to notoriously risk averse district buyers.

Figure 7: Share of teachers using *core curriculum daily* by age



Note: Excludes nine respondents who selected “prefer not to say” when asked for age.  
Source : EY-Parthenon teacher survey (June 2019).

However, over the long run, teachers’ apparent lack of investment in core curriculum materials could be troubling. This is particularly true given that younger teachers (Millennials) are the least likely to use core curriculum frequently today (Figure 7); as this new generation of teachers begins to teach in more and more classrooms, these trends could accelerate. However, there is a window of opportunity now for core providers to prepare themselves for the trends to come.

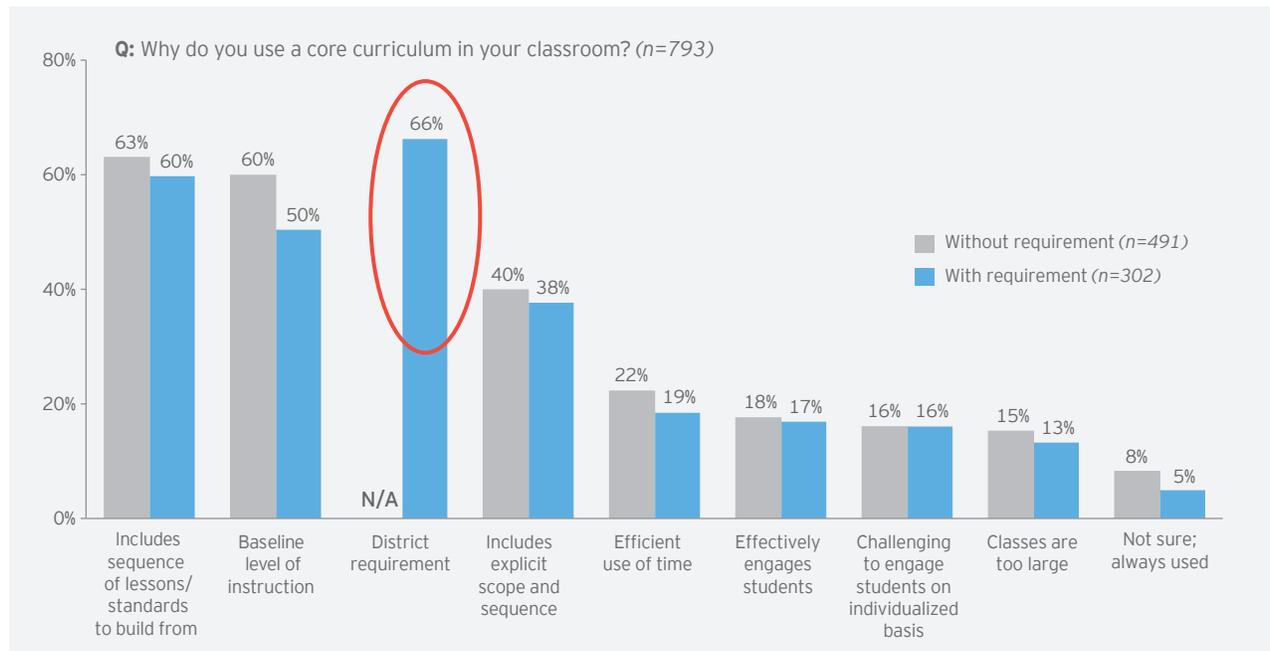
## Implications: What can market participants do to respond to these trends?

These findings raise an important question: what can market participants do to get ahead of these trends? There are implications for providers of all types, but core providers likely require the biggest pivot. A specific finding from our survey provides support for a path forward: specifically, teachers report that the biggest reasons why they use core curriculum are the sequence of lessons/standards to build from and the baseline level of instruction provided. This finding suggests that there could be an option for core curriculum providers to rightsize their offerings. While most core options are

rather “heavy duty” today in terms of what is provided (and therefore what districts pay for), what teachers (and likely districts) really want and need is the sequence and baseline level of instruction. Focusing on rightsizing could help core providers focus on the most essential elements, rather than expensive, full-blown packages, and avoid some of the loss of classroom share to teacher-sourced and supplemental materials providers.

This idea is further supported by recent data from Simba, which found that one of the ways that districts increase spending on supplemental resources is by leveraging open source core programs and spending the remaining dollars on supplemental. Districts using the “Big Three” core math providers spent an average of \$11.6k per classroom on supplemental, while

Figure 8: Reasons for core curriculum usage



Source: EY-Parthenon Teacher Survey (June 2019).

Eureka math customers spent \$24.4k. This suggests that districts are thinking strategically about how to purchase fewer heavy duty core materials and instead spend funds on the materials that teachers prefer to use. To avoid share loss to open source players, core curriculum providers may need to figure out how to take advantage of this trend.

Supplemental providers, on the other hand, have a clear opportunity to take advantage of more flexible spending, and a positive perception of the effectiveness of these materials. At the same time, there are opportunities to become even more central to teacher workflows – for example, by providing information on how materials can fit into a larger scope and sequence. Doing so will likely be important to helping supplemental providers to avoid share loss to free, teacher-sourced materials, which are increasing in popularity and will likely only continue to become better and more popular as a younger generation of teachers moves into America’s classrooms.

Ultimately, our research revealed some surprising realities as well as findings that confirm the popular narratives in the education world. While teachers are not the end buyers of instructional materials, we do believe that their usage will, at least in the long run, ultimately drive the success (or lack thereof) of instructional materials players. We hope that these results are both interesting and helpful as instructional materials players consider their futures in this ever-evolving marketplace.

Figure 9.1: Average spend per classroom on supplemental math resources by core program provider, 2018

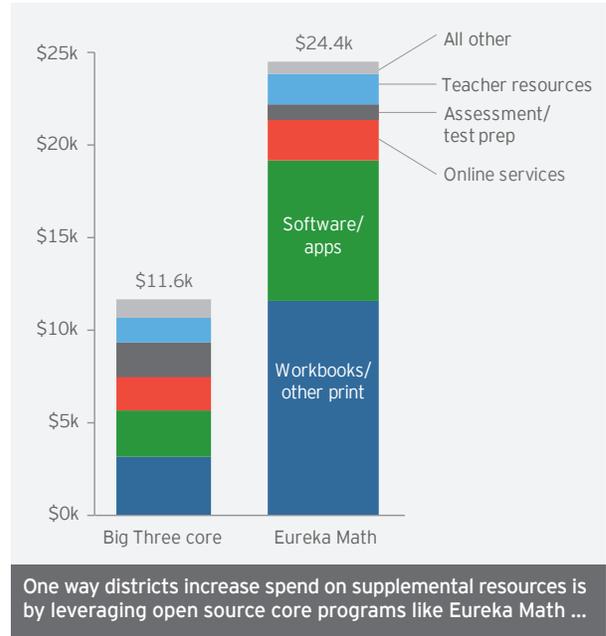
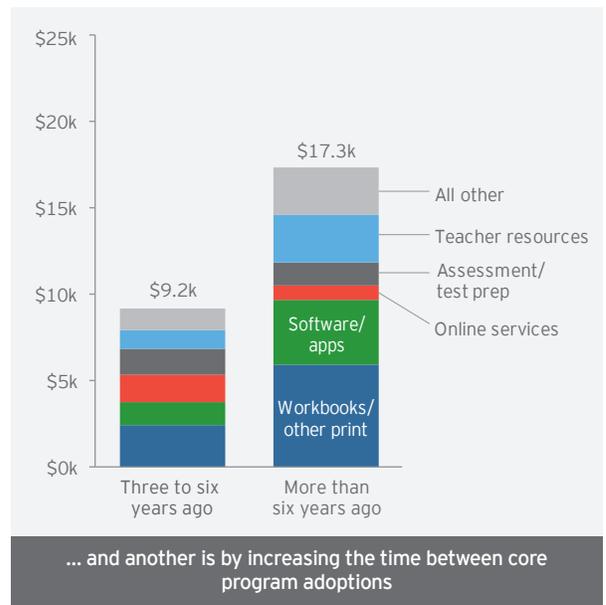


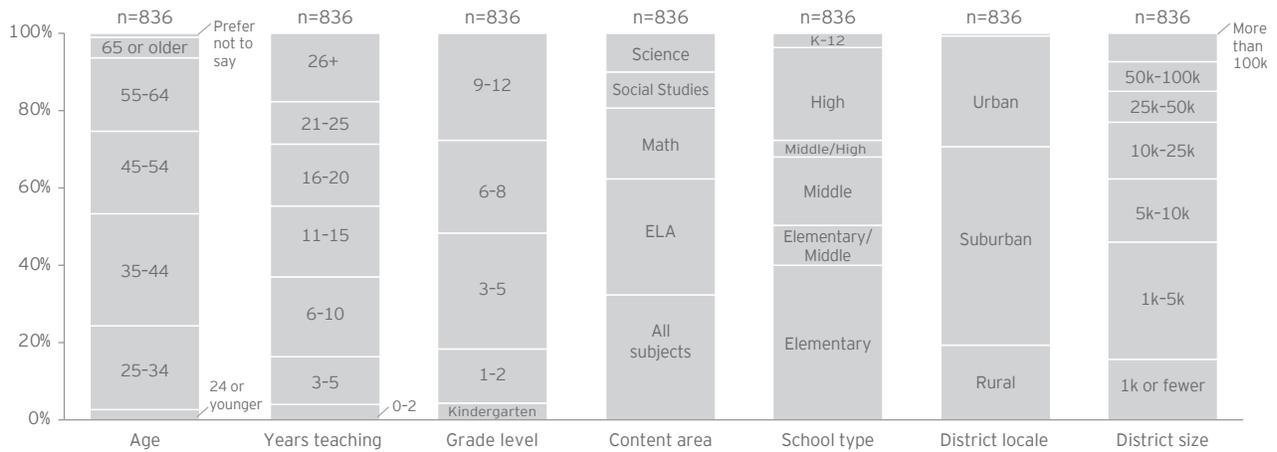
Figure 9.2: Average spend per classroom on supplemental math resources by year since core math adoption, 2018



Source for Figures 9.1 and 9.2: Simba

## Appendix

### Survey demographics, June 2019



### Average teacher/school characteristics by cluster

Teacher/school characteristics	1: Kitchen Sink (n=223; 31%)	2: Nonstandard (n=159; 22%)	3: Independent (n=119; 17%)	4: Traditional (n=214; 30%)	Perspectives
% of classroom time using core	36% <sup>2,4</sup>	26% <sup>1,4</sup>	29% <sup>4</sup>	44% <sup>1,2,3</sup>	Traditional cluster spends more % of time using core
Teacher tenure (years)	13.8 <sup>3,4</sup>	13.9 <sup>3,4</sup>	19.2 <sup>1,2</sup>	16.8 <sup>1,2</sup>	Independent and traditional clusters have greater teacher tenure
Grade level mean (lower # = lower grades)	4.3 <sup>3</sup>	4.6 <sup>3</sup>	5.2 <sup>1,2,3</sup>	4.4 <sup>3</sup>	Independent cluster overindexes on upper grade teachers
% of students below grade level	32% <sup>2</sup>	41% <sup>1,4</sup>	36%	31% <sup>2</sup>	Nonstandard cluster teaches more students performing below grade level
Students with IEPs (lower # = lower %)	3.0	3.4 <sup>3,4</sup>	2.6 <sup>2</sup>	2.7 <sup>2</sup>	Nonstandard cluster teaches more students with IEPs
Students with free lunch (lower # = lower %)	4.2	4.5 <sup>3,4</sup>	3.9 <sup>2</sup>	4.1 <sup>2</sup>	Nonstandard cluster teaches more students with free and reduced lunch
Lesson plan submission (lower # = smaller size)	32% <sup>2,3,4</sup>	3.7 <sup>1,3</sup>	4.8 <sup>1,2,4</sup>	4.0 <sup>1,3</sup>	Independent cluster has greater lesson plan submission requirements
Average weekly hours spent planning	10.0 <sup>3,4</sup>	9.2	6.9 <sup>1</sup>	7.6 <sup>1</sup>	Kitchen Sink planners spend more time planning in a given week
School size mean (lower # = smaller size)	3.9	4.1	4.3	3.9	Independent cluster tends to teach in larger schools
Technology mean (lower # = more tech)	1.9 <sup>2</sup>	2.2 <sup>1</sup>	2.1	2.1	Nonstandard planners have slightly greater access to technology
Age mean (lower # = younger teacher)	3.2 <sup>3,4</sup>	3.3 <sup>3,4</sup>	3.8 <sup>1,2</sup>	3.7 <sup>1,2</sup>	Independent clusters tend to be older teachers on average
% where district has core usage requirements*	65%*	26%*	23%*	46%*	Clusters that use core more frequently tend to have district requirements for usage

Note: Superscripts indicate clusters that are significantly different from each other at the 95% confidence level.

\*Statistical significance test not performed on this metric.

Source: EY-Parthenon teacher survey (n=714); SPSS

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