



The Brands That Rule The Classroom

What We Learned From Brand Tracker **2023**

Learn more at:



teachertapp.co.uk



“Teacher Tapp's Brand Tracker has been **invaluable** to us in understanding the impact of our marketing activities within the sector. As a national organisation, it has allowed us to observe the aggregated impact and **make more informed decisions** going forward.”

Alistair Wood, CEO, Edapt



Key findings 2023

Products that supported remote learning during the pandemic are seeing lower recognition and usage. This reflects a more 'natural' state for the market, rather than a rejection of the solutions offered.

The teaching profession is tough right now; teachers don't necessarily have the time to learn about new products, ironically even ones that are designed to save time! Teachers are using media and social media less, so brands need to find new ways to reach their customers.

Teachers don't buy from brands, they buy from other teachers.

That's why the Teacher Tapp Brand Tracker recommendation score is so **powerful**. There is no better advocate for your product or service than another teacher, 49 brands were awarded the gold recommendation award in 2023.

Could your brand feature next year?

Methodology





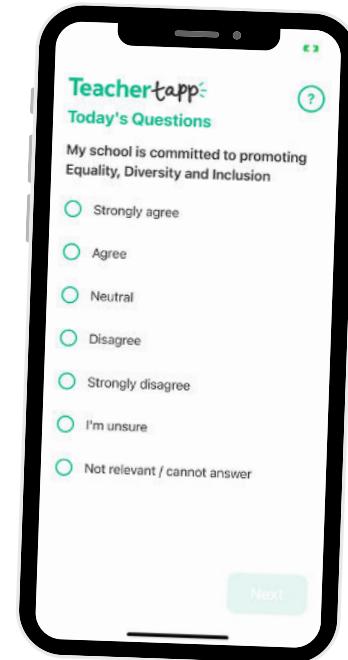
What is Teacher Tapp?

Our mobile app, **Teacher Tapp**, surveys over 10,000 teachers with three multiple choice questions every single day...

(Yes, even Christmas day!)

We have every type of teacher on our app, from primary through to every subject at secondary phase, and at every level of seniority too.

We've collected **more than 40 million data points** already so we know our teachers *really* well!



Founded by experts

Professor Becky Allen and Laura McInerney set up Teacher Tapp in 2017 as an experiment when Becky was running Education Datalab and Laura was editor of Schools Week.

Teacher Tapp surveys have been featured on the BBC, Sky News, Radio 4's More or Less, The Guardian, The Times, TES and Schools Week.



What is Teacher Tapp's Brand Tracker?

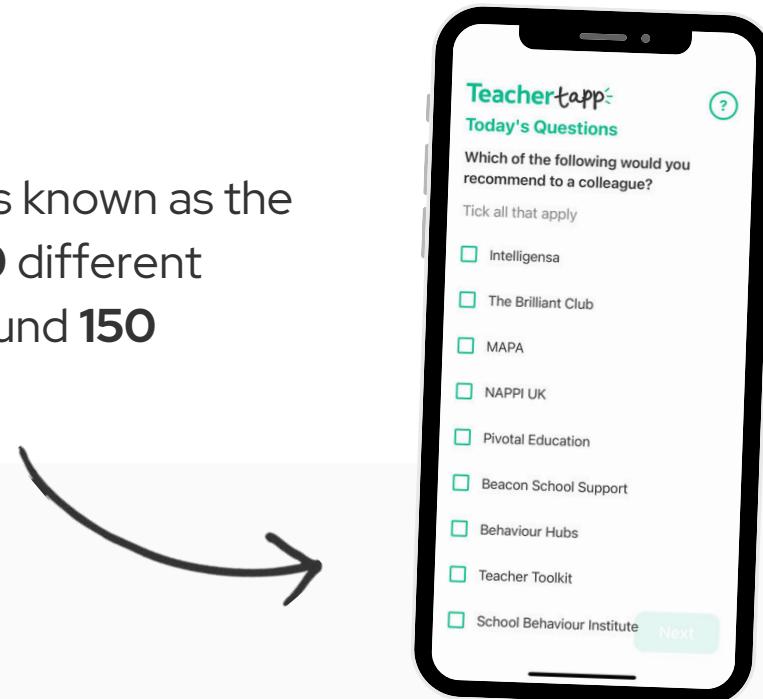
Once a month we ask our panellists a set of questions known as the Brand Tracker Questions. We ask questions about **20** different education organisations each month - and cover around **150 organisations per year.**

Our questions ask if teachers have:

- heard of
- use, or
- recommend

any organisation, product or programme. On average each brand is polled by **~3,000 teachers**, including senior and headteachers. From this data we create a variety of brand tracking tools.

We select brands to include based on a variety of measures, including popularity, increasing interest in a market, and client need. All organisations in the report can purchase a subscription to the Tracker and in-depth analysis for their own company. BUT, this is not a requirement for entry into the tracker!



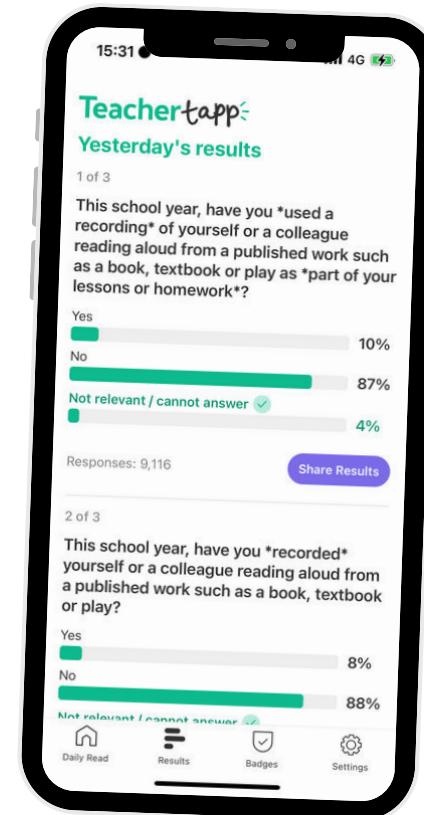


How do we know our data is reliable?

Our daily surveys fairly represent the teaching population overall, so you can have confidence in our results.

- 1. We 're-weight' our sample each day.** This means we statistically re-balance the results, using the Workforce Census, to ensure we have the right proportion of teachers by gender, age, phase, job seniority and region.
- 2. We check results from key questions against other national surveys.** We can show that we get very similar results to other 'random sample' surveys.

With over 10,000 daily participants in over 4,000 schools, we have a wider reach than any other regular teacher survey.



How we wrote this report

In the academic year 2022-3 Teacher Tapp's Brand Tracker looked at 290 separate educational brands.

For 214 of the brands, we held data from earlier academic years. These are the brands that feature in this analysis.

The 214 brands were grouped into 30 product types. For each product type, we looked at how teachers awareness, use, and opinion of these products had changed, drawing out key themes and trends.



If you would like to know if your brand was included and what teachers think of it, contact hello@teachertapp.co.uk

The 30 product groups



These are the 30 product types we looked at.

Their size in the diagram represents the number of brands offering these products. I.e. there are more training, maths, assessment and curriculum brands than, say, safeguarding brands.

The analysis takes account of this by weighting results within each product type.

2023

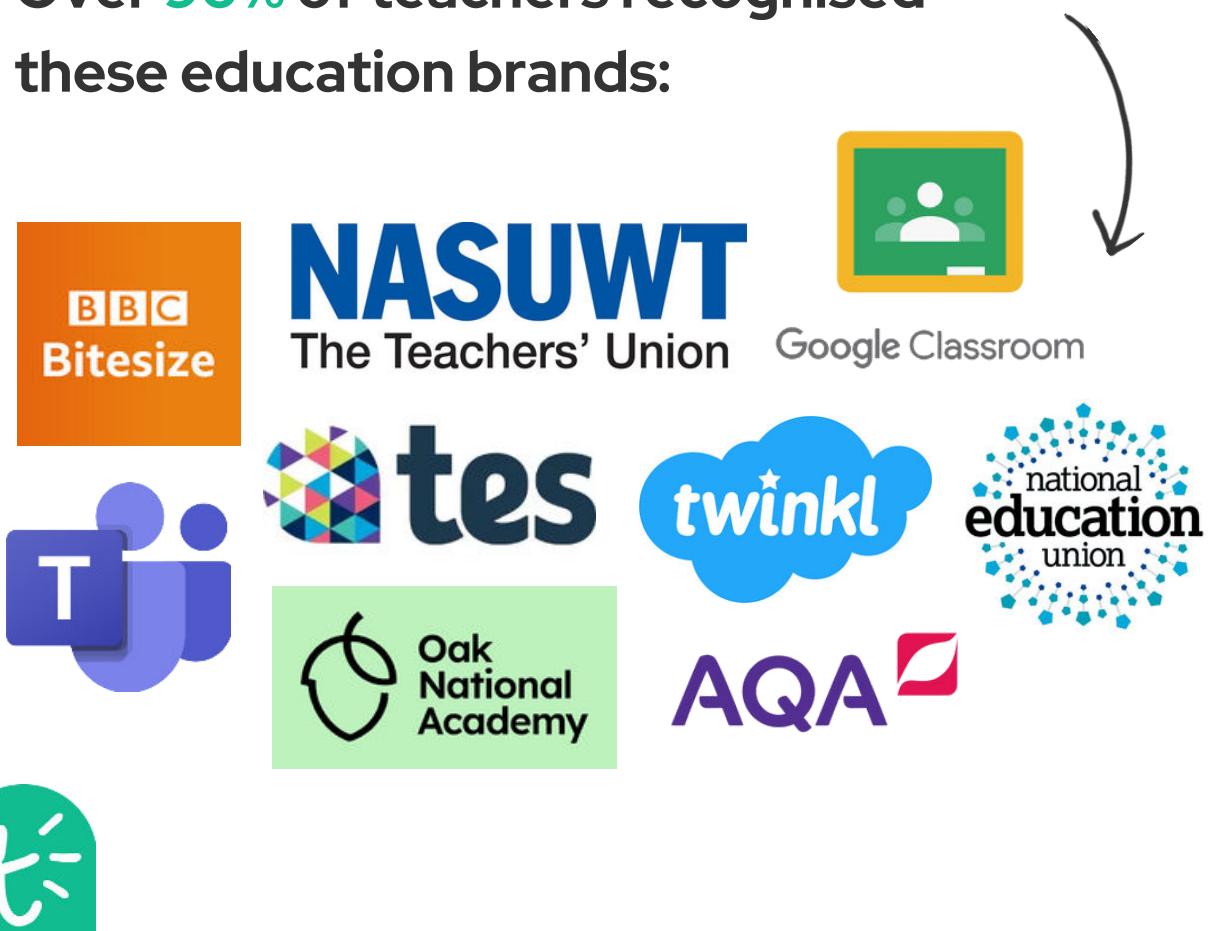
Brand Tracker

winners



Here are the most recognised brands in education

Over 90% of teachers recognised these education brands:



Some brands get a headstart when it comes to awareness

Some of the most recognised brands in education have been around for a **very** long time. Both tes (est 1910) and NASUWT (est 1919) are over 100 years old.

However, the education market in England is constantly evolving, and the likes of Oak National Academy (est 2019) and Microsoft Teams (est 2017) demonstrate that the right products can also quickly establish themselves as well known brands.



Karen Wespieser MBE
COO, Teacher Tapp

The Brand Tracker **High Riser** Recommendation Winners 2023

High Riser awards go to the organisation with the **largest recommendation score increase**. Increases compare current score to the previous time asked.





The Brand Tracker **High Riser** **Awareness** Winners 2023

High Riser awards go to the organisation with the **largest awareness score increase**. Increases compare current score to the previous time asked.



Arbor

UCAS



INTO
FILM



Dr Frost
LEARNING



Education
Endowment
Foundation

Bromcom
No.1 Choice for Cloud MIS & Finance

ImpactEd

Mathletics



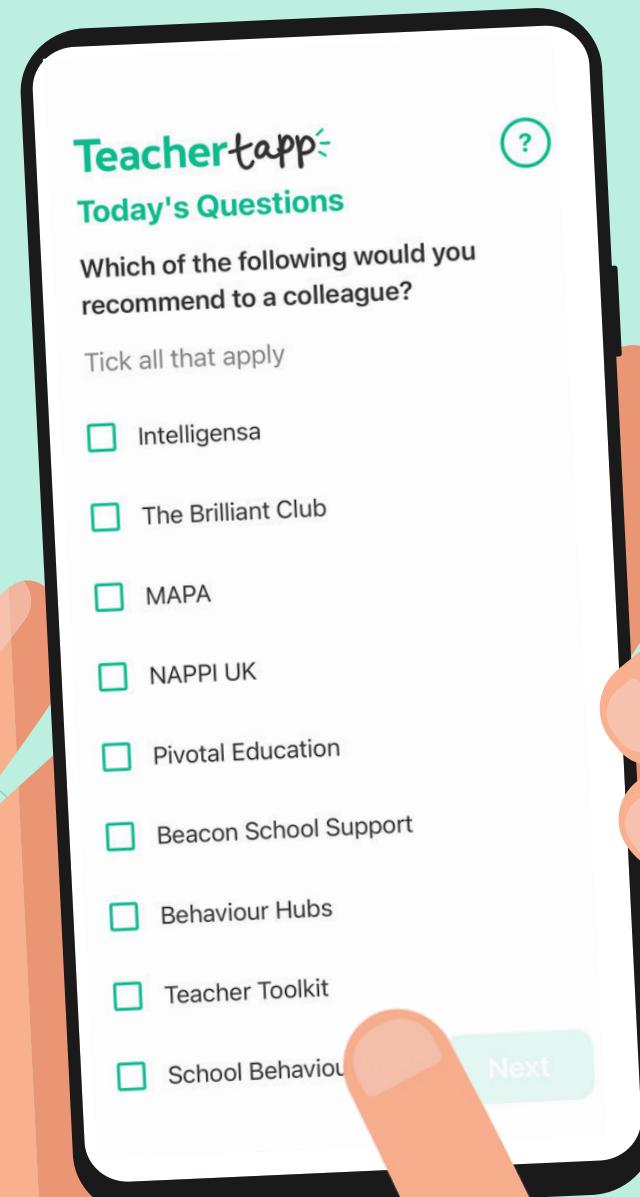
TT Education
The School Improvement Company

The Brand Tracker Gold Award Winners 2023

Gold Recommendation Awards go to any organisations with at least a **10% usage** rate and at least **90% of users also recommend it**.



Heard of Used Recommended



Have you heard of...

Across 2023, we saw an overall reduction in teachers' awareness of educational brands: of the 214 brands we looked at, half had reduced awareness.

There is no strong pattern about the type of product where awareness reduced, but online learning platforms & EdTech seem slightly more affected than other areas. This likely relates to these types of products having artificially high awareness ratings during the pandemic years, rather than an active reduction in 2023.

A **third of brands** saw awareness amongst teachers increase during 2023. The biggest change was the proportion of teachers that had heard of various unions (and union alternatives). The industrial action around teacher pay was a clear driver in this change in awareness.

Other product types that saw an increasing proportion of teachers having heard of them included management information systems, organisations that provide survey and research data, brands that provide safeguarding support and services, and software providers.

One in five brands saw no change in how aware teachers are of them. Assessment organisations, curriculum providers, and parent communication brands were particularly stable.

Expert Analysis

Why was brand awareness lower in 2023?

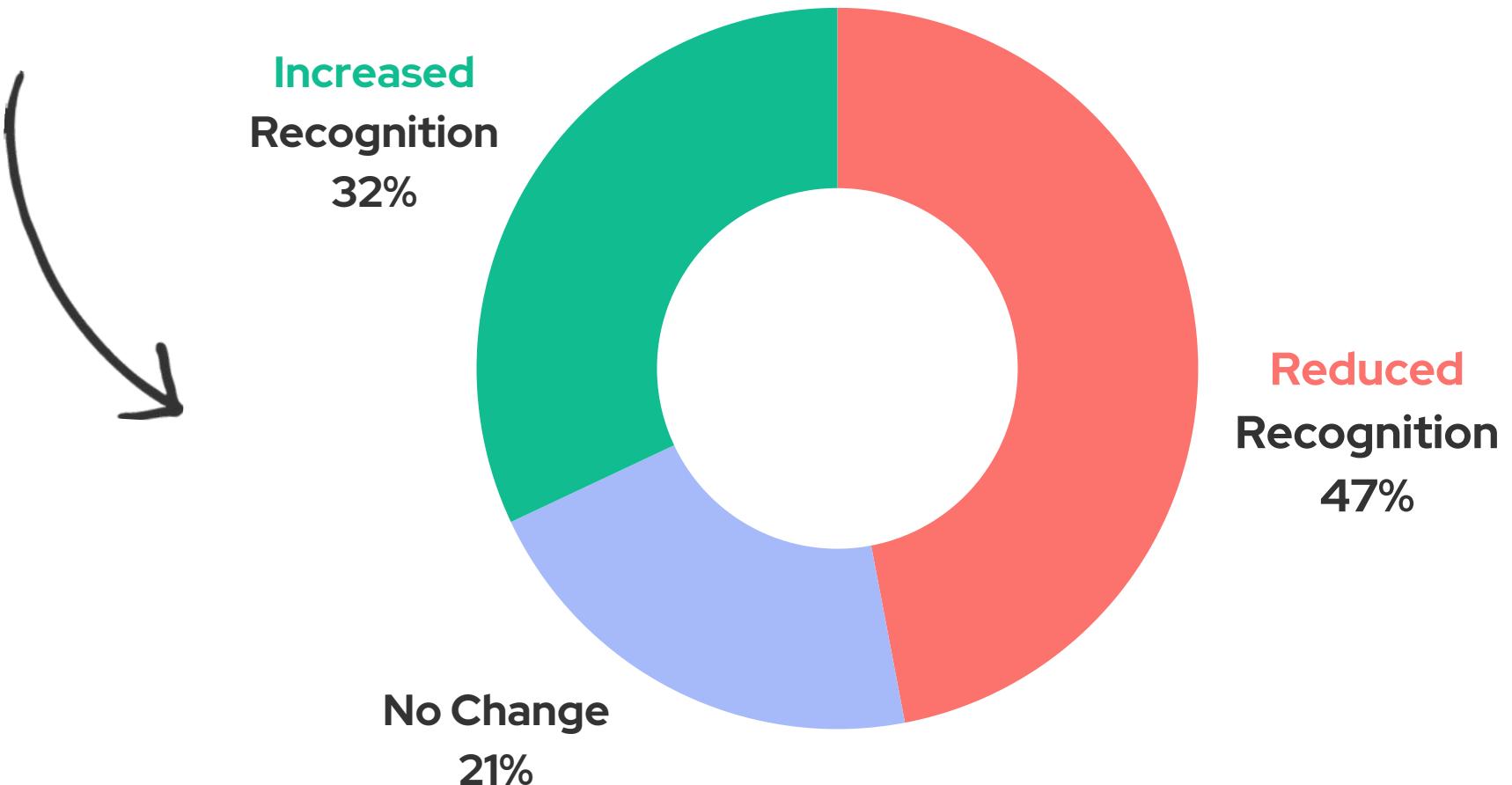
Teachers feel increasingly burdened by high workload and are reporting record levels of burnout, and this may contribute to less capacity to focus away from core responsibilities.

In addition, teachers use of media and social media is reducing, meaning there are fewer opportunities for brands to advertise to their target audiences.



Iain Ford
Senior Data & Reporting Analyst, Teacher Tapp

Awareness of educational brands **reduced** in 2023



Do you use...

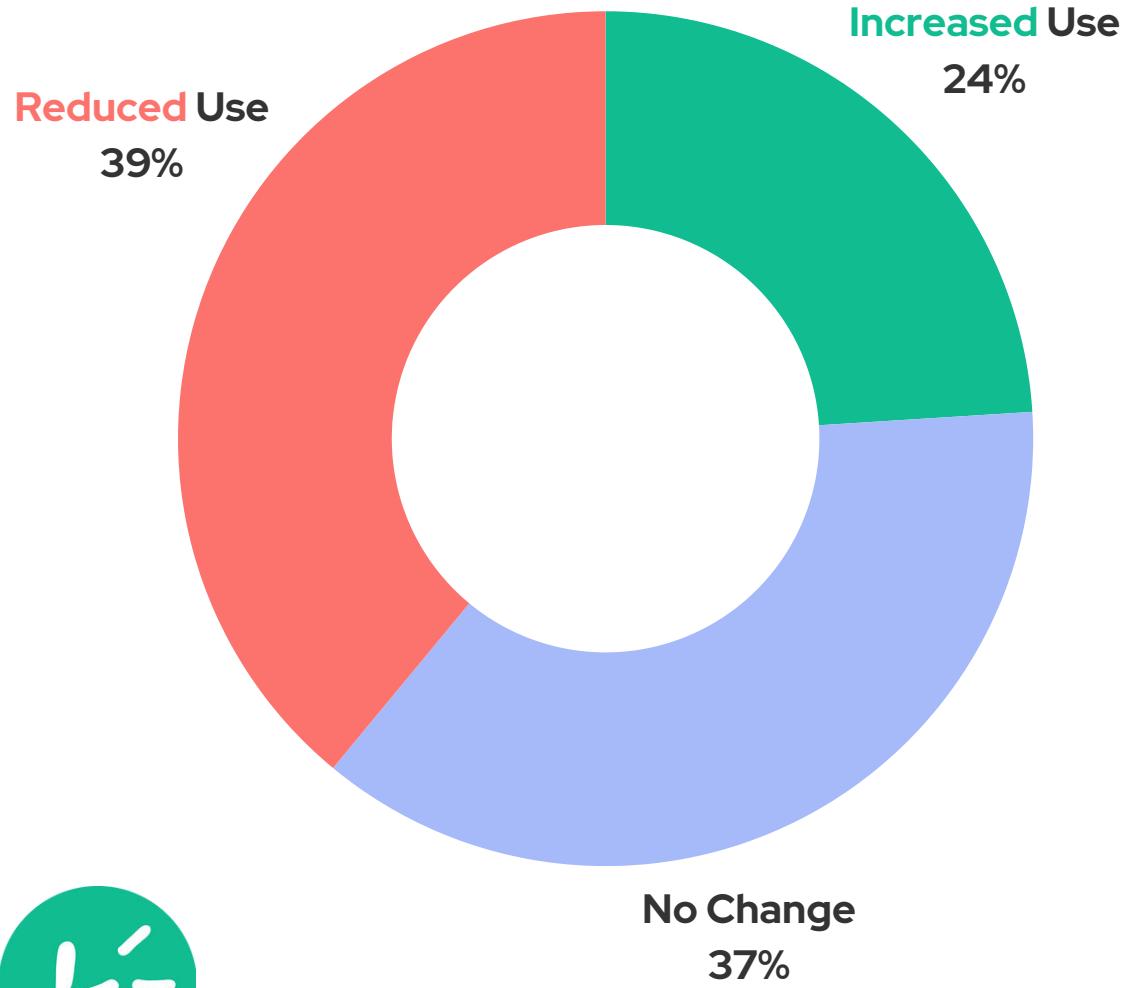
Usage of educational products and services was relatively stable in 2023. Over a third of product groups saw no change in usage.

The product types least likely to see a change in usage were the big investment pieces – increasingly purchased at Trust level – of MIS, HR systems, and software. These products often comprise of multi-year, multi-school deals, and changing systems can require significant procurement and change-management exercises.

Product groups that were used **less** during 2023 included curriculum products, literacy resources / support, and online learning platforms. These student-centred products were heavily relied on during the pandemic, so usage in 2023 may simply be returning to a more ‘natural’ state.

As with awareness, unions (and union alternatives) saw a significant increase in usage in 2023. With all major unions balloting members on strike action, 2023 was an important year for union membership. According to our Brand Tracker data, **nine in ten** teachers were members of a union in 2023.

Brand use was relatively stable in 2023



Expert Analysis

New curriculum opportunities in 2024?

Laura McInerney
Co-founder, Teacher Tapp



With a change at the top of Ofsted, plus a potential change of government, curriculum reform could see a resurgence in 2024 providing new opportunities for brands in this area.

Teacher Tapp polling has consistently shown **primary teachers** are less positive about current curriculum and assessment regimes than their secondary counterparts.

We also know that primary teachers are keen for the government to review these areas in future.



Would you recommend...

Teachers don't buy from brands, they buy from other teachers. That's why our Teacher Tapp Brand Tracker recommendation score is so powerful. There is no better advocate for your product or service than another teacher.

Four in ten of the brands included in our Tracker saw a reduction in the proportion of teachers recommending them in 2023. EdTech products saw some of the biggest reductions in their scores; a broad collection of products, it can be difficult to draw assumptions about the reasons for dropping recommendations.

Recommendations for safeguarding companies increased. Although only a small part of the education market, these companies consistently punched above their weight in all categories during 2023.

Like usage, recommendations remained largely static for big investment products like MIS, HR systems, and software. Also in this list are training providers, a group who comprise significant proportion of the brands in our tracker, and whom often receive favourable recommendation scores overall.

Why don't EdTech products get recommended more?

Writing on LinkedIn, EdTech Forum founder, Jay Ashcroft suggested two barriers to EdTech success:

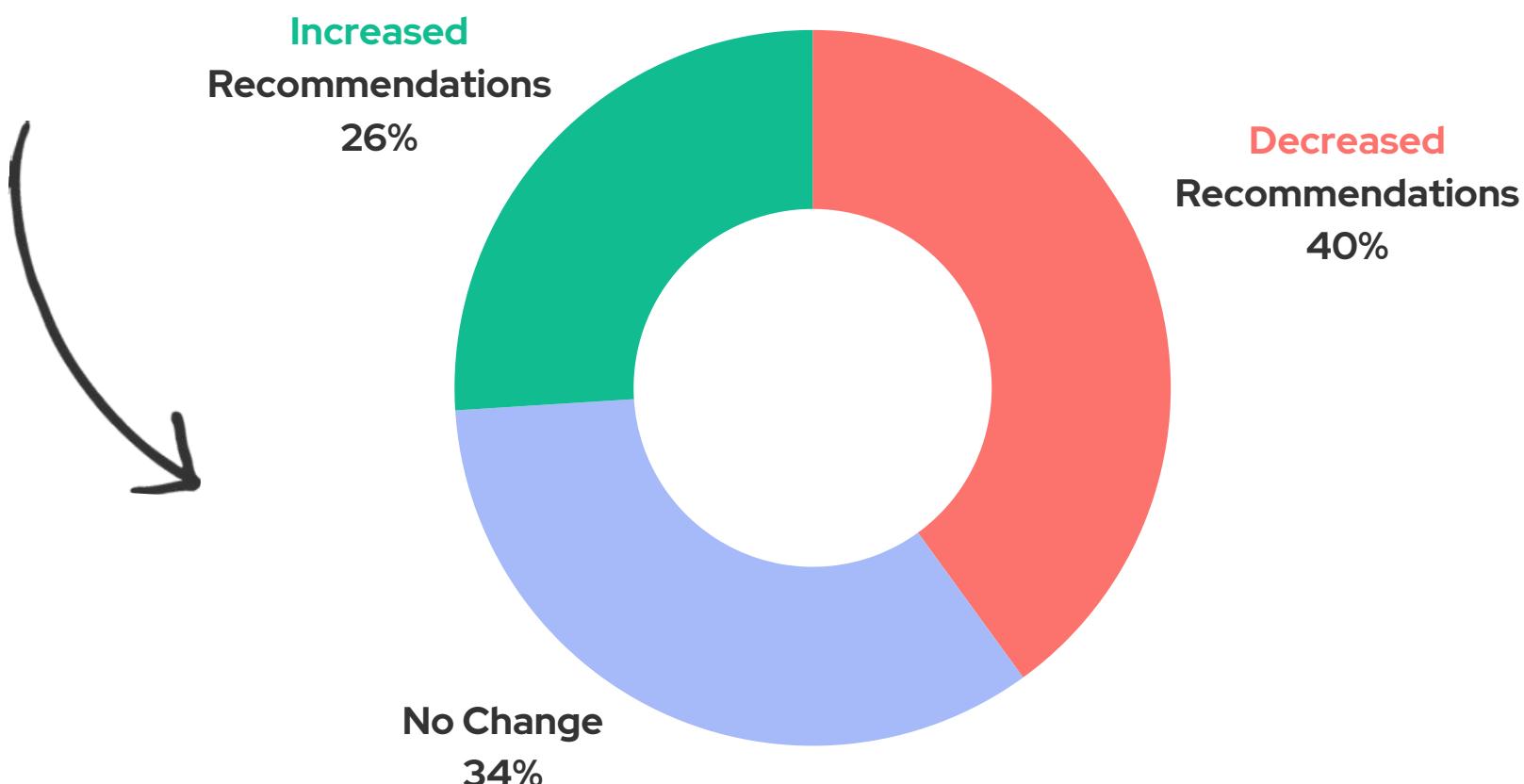


1. Overinflated Marketing Claims: EdTech marketing is full of runaway claims with little or no evidence to support them and this is setting up expectations that you're not going to be able to meet.

2. Underinvesting in Customer Success / Onboarding: A huge number of companies don't have a structured onboarding process. It's pretty standard that a school signs the contract, gains access, and gets 60 minutes of online training. Then they're off on their own. "Call or email us if you have a problem."

Schools are not the most technological able or confident places, so deep down, we all know that this isn't going to be enough... If you don't step in and fill that gap, your EdTech is underutilised and seen as poor value for money.

Many educational brands **lost** teacher recommendations in 2023



Would you like your brand to feature in 2024?

Choose
between

Highlight Reports

Our expert analysts have formulated a set of comparable benchmarks to profile your target audience across 5 groups:

- **perfect**
- **problem**
- **prevented**
- **possible, or**
- **potential customers.**

You can request the highlights reports of **any** company.

Deep Dive Reports

Deep dive reports help you work out who most knows, likes and uses your product so you can make better marketing decisions. It shows findings by job role, school type, region, age, subject, phase, and we can add bespoke options as required.

Deep Dive reports are **only** available for organisations that you manage.

“ Teacher Tapp’s reach and speed make them a good resource for anyone who wants to understand school perspectives. What takes them from good to amazing is the combination of their **strong understanding of issues** and their curiosity to learn more. I value their data and their insights incredibly highly. ”



Ian Koxvold, Head of Education,
Strategy and Corporate Development,
Supporting Education Group



Ready to start learning?

**We love to answer your questions
it's **what we do best!****

If you'd like to know more about Teacher Tapp survey questions or our brand tracking service, get in touch:

Email hello@teachertapp.co.uk