

Simba Information's 2008 Textbook Adoptions Scorecard and 2009 Outlook

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Abstract



Simba Information's 2008 National Textbook Adoptions Scorecard and 2009 Outlook presents the crucial business intelligence on textbook adoptions necessary for developers and marketers of instructional materials in a convenient single-source reference edition.

This report offers the most comprehensive analysis available of the results of 2008 state textbook adoptions that is expected to generate nearly \$900 million in first-year revenue for publishers, as well as creating traction for publishers in non-adoption states, or open territories, and creating opportunities for publishers of supplementary materials in ensuing years.

Prepared by the analysts at Simba Information, the **2008 National Textbook Adoptions Scorecard and 2009 Outlook** covers sales results in specific states, including California, Florida and Texas, and provides guidance for opportunities to come.

Topics include:

- Results from individual states
- Results in major disciplines
- Results by grade segments
- Scorecard of results and market share by publisher
- Index of top-selling K-8 textbooks
- Performance trends of electronic products
- Outlook for key adoption opportunities in 2009 and beyond

This report is an essential market intelligence tool for publishers, editors, marketing, business development and investment professionals who need to understand the business strategies currently driving this important segment of the educational publishing industry.

Sample Pages



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a second-place showing in Texas K-5 math, drove results. McGraw-Hill also commanded sales at the high school level, particularly in social studies in North Carolina and Tennessee.

In Florida alone, McGraw-Hill claimed to have captured more than 70% of the K-5 reading market, and it expects to capture more than 40% of the K-12 reading/literature state adoption market in Alabama, Indiana, Louisiana and Oklahoma. By its own calculations, McGraw-Hill said it expected to capture 31% of the total available dollars in the new adoption market in 2008.

McGraw-Hill's closest competitor was Pearson's multimedia elementary offering *enVision* elementary reading program, *Reading Street* based on estimated sales of \$1.1 billion.

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(\$ in thousand)

Publisher	Total Sales	Share	Rank
McGraw-Hill	2,100,000	32%	1
Pearson	1,100,000	17%	2
Harcourt	600,000	9%	3
Houghton Mifflin	500,000	8%	4
Voyager	400,000	6%	5
Gibbs Smith	300,000	5%	6
Nat'l. Geo./H-Brown	200,000	3%	7
Sopris West	150,000	2%	8
Scholastic	100,000	2%	9
Others	150,000	2%	10
Total Sales	6,500,000	100%	

*Estimates based on selected textbook adoptions in Georgia, Idaho, Indiana, Louisiana, North Carolina, state were included. Estimated sales are based on publisher and book depositories.

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Hill's strength was in a 32% capture rate for its basal *Treasures* program, boosted by a 7% share from sales of *Imagine It!*, a program from McGraw-Hill's SRA unit.

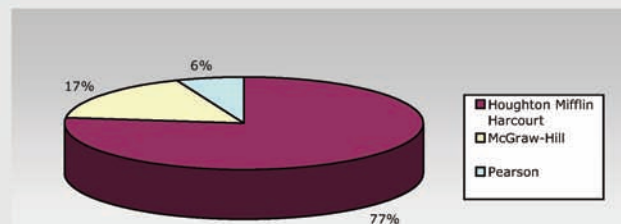
Clearly in this segment, Harcourt's *Storytown* was the single most dominant program, capturing a 36% share of sales, according to data from the Louisiana textbook depository. Sales of Houghton Mifflin's *Anthology* and Rigby's *Literacy by Design* each added less than 1% to the publisher's overall market share in this segment.

Pearson's strongest showing in the Louisiana adoption was in elementary reading, where it produced a solid third-place finish on a 24% share of sales from *Reading Street*, the new program from Scott Foresman.

Houghton Mifflin Harcourt dominated the secondary segment, capturing a 77% share in each of the grades 6-8 and 9-12 segments.

Secondary purchasing was heaviest in the grades 6-8 segment, where *Elements of Literature* from Harcourt's Holt, Rinehart & Winston imprint captured a 39% share, just ahead of a 38% share from *McDougal Littell Literature* from Houghton Mifflin, as shown in Table 9. All market shares in the 6-8 segment primarily are from the secondary titles, buttressed with sixth-grade sales of elementary programs.

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