



Introductory Statistics

5-Year Dynamic Market Report and Adoption Volatility Analysis

2017

TABLE OF CONTENTS

EXECUTIVE SUMMARY		1	
METHODOLOGY		3	
PART A: PUBLISHER MARKET SHARE			
1.		Current Year Market Share	5
2.	CHART 1	Estimated Market Size & Tech Segment by Academic Year	6
3.	TABLE 1	Annual Publisher Market Share	7
4.	CHART 2	Annual Publisher Market Share (Line Chart)	8
5.	TABLE 2	Annual Technology Market Share	9
6.	CHART 3	Technology Estimated Enrollment (Line Chart)	10
7.	CHART 4	Annual Technology Market Share (Line Chart)	11
8.	CHART 5	# of Schools using Technology by Year (Line Chart)	12
9.	CHART 6	Technology Conversion Rate by Publisher (Line Chart)	13
10.	TABLE 3	Annual Title Market Share	14
11.	CHART 7	Annual Title Market Share (Line Chart)	16
12.	CHART 8	Annual Author Family Market Share (Line Chart)	17
PART B: UNIVERSITY ADOPTION VOLATILITY ANALYSIS			
Adoption Volatility Metrics for Fall 2012 through Spring 2017			
1.		Schools that Changed Technology	19
	TABLE B1	Summary of Technology Adoption Changes	23
2.		Schools that did not change textbooks	24
3.		Schools that Changed Textbook in at least one course	
		a. Changed Adoptions Once	31
		b. Changed Adoptions Multiple Times	37
4.		Schools with individual instructor choice	44
5.	TABLE B2	Summary of Adoption Changes by Title	45
6.	TABLE B3	Summary of Adoption Changes by Publisher	46
7.	TABLE B4	Brand Loyalty Analysis for Leading Texts/Author Families	47
APPENDIX A:			
		Intro Stats Top 50 Schools by Enrollment	48
APPENDIX B:			
		All NAVSTEM Schools – Alphabetical Listing	54

CHART 2
Introductory Statistics
Annual Publisher Market Share
Fall 2012 to Spring 2017

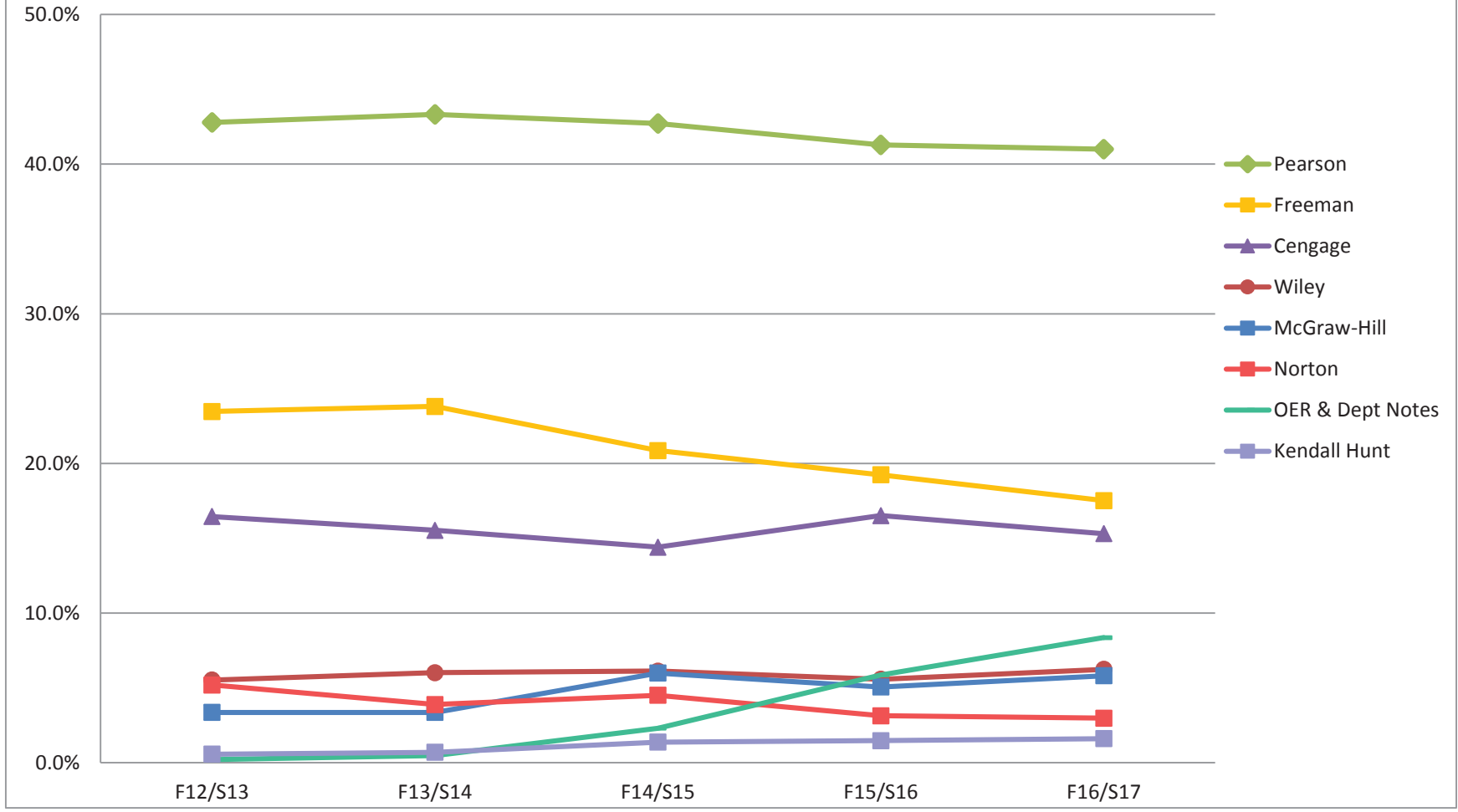


CHART 5
Introductory Statistics
of Schools using Technology
Fall 2012 to Spring 2017

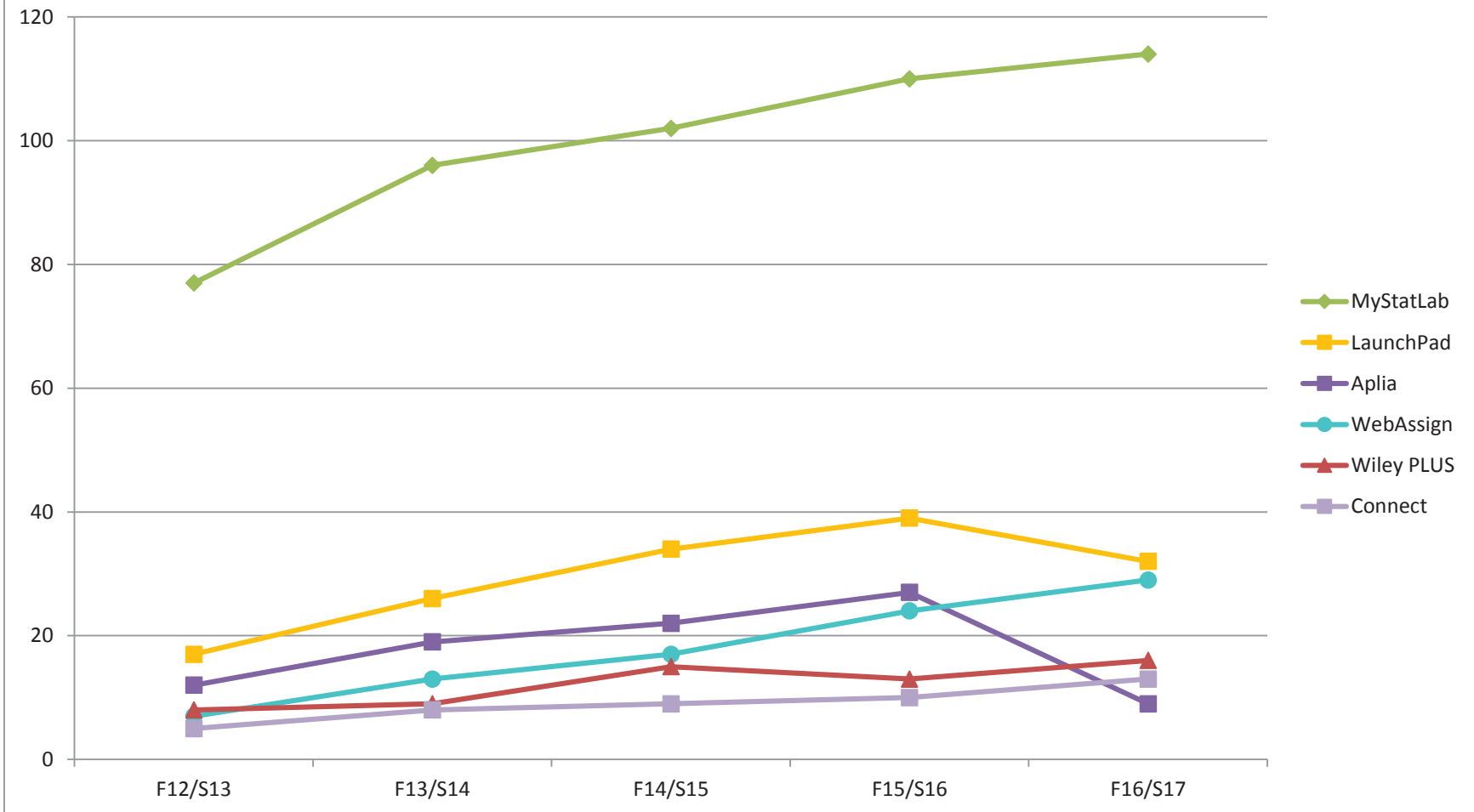
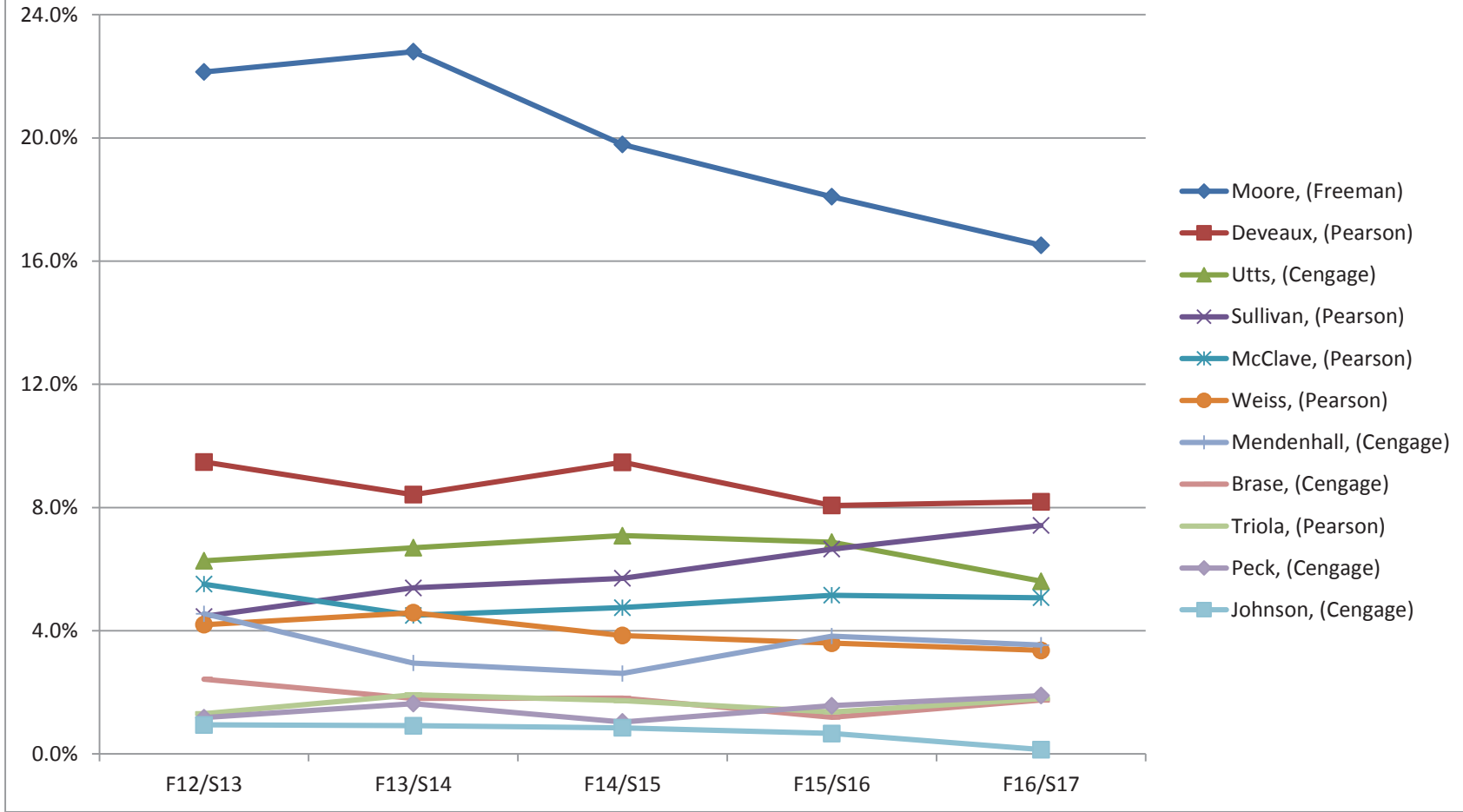


TABLE 3
Introductory Statistics
Annual Market Share for Leading Titles
Fall 2012 to Spring 2017
Page 1

Publisher	5-YEAR TOTALS		F12/S13		F13/S14		F14/S15		F15/S16		F16/S17	
	Enroll	%	Enroll	%	Enroll	%	Enroll	%	Enroll	%	Enroll	%
Moore-Basic 7e, '15 (Freeman)	130,008	8.1%	25,284	8.2%	28,310	9.0%	23,172	7.3%	26,489	8.1%	26,753	8.0%
Moore-Intro 9e, '17 (Freeman)	110,148	6.9%	21,094	6.9%	25,194	8.0%	26,184	8.3%	20,086	6.2%	17,590	5.2%
Agresti 4e, '17 (Pearson)	102,343	6.4%	21,505	7.0%	21,403	6.8%	21,615	6.8%	21,359	6.5%	16,461	4.9%
Deveaux-Intro 4e, '14 (Pearson)	76,095	4.8%	14,659	4.8%	13,279	4.2%	18,150	5.7%	14,524	4.4%	15,483	4.6%
Utts-Mind 5e, '15 (Cengage)	71,637	4.5%	12,353	4.0%	14,152	4.5%	15,430	4.9%	16,200	5.0%	13,502	4.0%
Mcclave 12e, '13 (Pearson)	68,059	4.3%	14,973	4.9%	12,546	4.0%	12,968	4.1%	13,630	4.2%	13,942	4.2%
Deveaux-Data 4e, '16 (Pearson)	63,343	4.0%	14,498	4.7%	13,142	4.2%	11,885	3.7%	11,818	3.6%	12,000	3.6%
Freedman 4e, '08 (Norton)	61,667	3.9%	15,581	5.1%	12,078	3.8%	13,953	4.4%	10,217	3.1%	9,838	2.9%
Moore-Con 9e, '17 (Freeman)	57,093	3.6%	12,331	4.0%	12,169	3.9%	10,229	3.2%	12,085	3.7%	10,279	3.1%
Mendenhall-Intro 14e, '13 (Cengage)	54,164	3.4%	13,260	4.3%	8,509	2.7%	8,292	2.6%	12,501	3.8%	11,602	3.5%
Sullivan 4e, '13 (Pearson)	53,703	3.4%	6,967	2.3%	9,869	3.1%	10,399	3.3%	11,947	3.7%	14,521	4.3%
Sullivan-Fund 5e, '18 (Pearson)	41,654	2.6%	6,756	2.2%	7,054	2.2%	7,689	2.4%	9,780	3.0%	10,375	3.1%
Mann 9e, '17 (Wiley)	39,526	2.5%	10,854	3.5%	8,404	2.7%	6,896	2.2%	6,432	2.0%	6,940	2.1%
Weiss-Intro 10e, '16 (Pearson)	35,189	2.2%	7,485	2.4%	7,593	2.4%	6,774	2.1%	6,605	2.0%	6,732	2.0%
Utts-See 4e, '15 (Cengage)	32,433	2.0%	6,940	2.3%	6,858	2.2%	7,051	2.2%	6,252	1.9%	5,332	1.6%
Larson 6e, '16 (Pearson)	31,146	1.9%	6,314	2.1%	7,670	2.4%	6,883	2.2%	5,274	1.6%	5,005	1.5%
Bluman 7e, '14 (MH)	28,069	1.8%	7,018	2.3%	3,082	1.0%	5,531	1.7%	4,541	1.4%	7,897	2.4%
Weiss-Elem 9e, '16 (Pearson)	27,351	1.7%	5,426	1.8%	6,800	2.2%	5,426	1.7%	5,147	1.6%	4,552	1.4%
Navidi-Essen, '14 (MH)	25,306	1.6%	0	0.0%	4,262	1.4%	7,843	2.5%	4,790	1.5%	8,411	2.5%
Peck 5e, '16 (Cengage)	24,414	1.5%	3,048	1.0%	4,268	1.4%	2,904	0.9%	7,264	2.2%	6,930	2.1%
Triola-Essen 4e, '11 (Pearson)	23,659	1.5%	3,525	1.1%	5,255	1.7%	4,387	1.4%	4,455	1.4%	6,037	1.8%
Lock 2e, '17 (Wiley)	22,975	1.4%	590	0.2%	3,469	1.1%	5,927	1.9%	5,062	1.5%	7,927	2.4%

CHART 8
Introductory Statistics
Author Families Annual Market Share
Fall 2012 to Spring 2017



3. Schools that Changed Adoptions during the Period
b. Changed more than once – 53 schools (17%)

PLEASE NOTE: The following convention was used in the table below: the number that appears before an author's name indicates the track for which the text is used. In many cases there are entries in both the Used One Throughout and Changed Once columns. In these cases some course had no adoption changes while others had one change during the period. 'INDIVIDUAL CHOICE' after a course track number indicates individual instructor choice rather than a department-wide adoption.

Note: Technology components are noted in parentheses where APL is Aplia, MHC is McGraw-Hill Connect, MSL is MyStatLab, MXL is MathXL, STP is StatsPortal, WA is WebAssign and WP is WileyPlus.

School Name	Enroll	Tech Detail	Tracks	Used One Throughout	Changed Once	Multiple Changes
Alfred State College	459	1- WileyPlus dropped F15; 2-MyStatLab dropped F16	2			1- Johnson-S to Mann F14; Mann to Hawkes F16; 2 - Weiss-I (MSL) to Hawkes F16
Auburn University	540		1			Moore-IPS to Weiss-I F16; Weiss-I to NTR S17
Brown University	89		1			Moore-IPS to Mann S14; Mann to Freedman S15
California Polytechnic State Univ-San Luis Obispo	1,630	MyStatLab with DeVaux-I	3	2 - Utts-S (enr=180); 3- Peck-S (enr=30)		1- Individual Choice - Sanders, DeVaux-I (MSL), Moore-B, Peck to Diez W16 (enr=800)
California State University-Northridge	3,239	1-MyStatLab to LaunchPad F15; LaunchPad to WebAssign F16; 2- WileyPlus dropped S16	2			1- Triola-El(MSL) to Moore-B (LP) F15; Moore-B (LP) to Moore-B (WA) F16 (enr=3000); 2- Watkins(WP) to Mendenhall S16 (enr=200)
California State University-Sacramento	637	MyStatLab	1			Weiss-I (MSL) to Peck-S S13, Peck-S to Weiss-I (MSL) F13
Clarkson University	173		1			Sullivan-F to Peck-Stats F15; Peck-Stats to Sullivan-F (MSL) S17
Colorado State University	1,832	Webassign	2			1- Peck-S (WA) to Diez (WA) F14 (enr=1150); 2-Utts-M (WA) to Diez (WA) F16 (enr=700)