

NAVSTEM

3 Year Market Analysis: Abnormal Psychology

Table of Contents

Methodology	
Publisher Market Share	2
Executive Summary	3
Chart 1: Estimated Market Size & Tech Segment for Technology	4
Table 1: Publisher Market Share	5
Chart 2: Market Share for Publishers of Leading Textbooks	6
Chart 3: Annual Market Share for Publishers of Leading Textbooks	7
Table 2: Enrollment and Market Share of Technology	8
Chart 4: Estimated Annual Technology Enrollment	9
Chart 5: Technology Market Share	10
Chart 6: Annual Technology Market Share	11
Table 3: Enrollment and Market Share by Title	12
Chart 7: Market Share of Leading Textbooks	13
Chart 8: Annual Market Share of Leading Textbooks	14

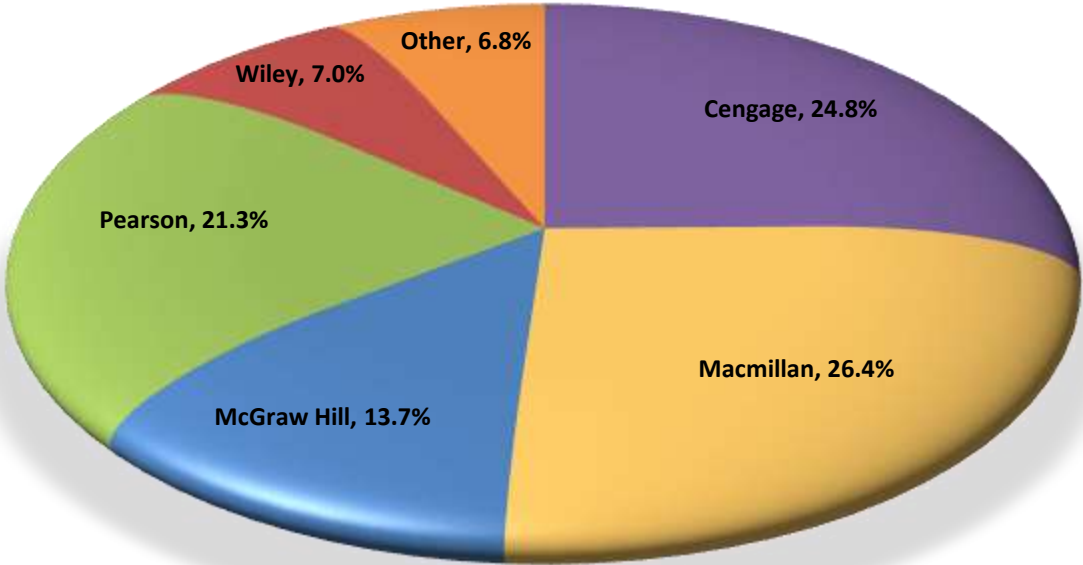
Methodology

The NAVSTEM Market Database covers 70% of the total 4-year engineering school market in the US and Canada. This analysis is based on a data set of 3,196 abnormal psychology textbook adoptions over a 3-year period between Fall 2020 and Spring 2023. Adoptions are tracked on a semester-by-semester basis in order to provide a dynamic representation of market size as well as market share at the publisher and product level. The enrollment numbers on the enclosed charts are just that, enrollments. They do not indicate text sales (new, used, or rental) but rather number of students in a course where a particular course text was assigned.

Cumulative enrollment figures in the market share tables are for courses tracked by NAVSTEM. The Market size (Chart 1, Chart 2) is calculated on the assumption *that for this course area, NAVSTEM data represents 70% of the total market*. Market growth/decline (see Key Data Points) is for the most recent year.

In addition to tracking textbooks, NAVSTEM also tracks technology (MindTap, Revel, Connect, etc.) when it is assigned along with a course text for this market. As with the textbook adoption, technology market share is calculated based on course enrollment and does not indicate activations. Technology penetration (see Key Data Points) is determined at the school level as a percentage of total schools offering the course.

Current Publisher Market Share



Current Key Data Points	
Current Market Size	176,000
Market Growth/Decline	↓ 6%
Average Course Size	150
Technology Penetration	33%

Executive Summary

Market Background

Social psychology adoptions are often individual choice. Along with a range of available OER materials it is also not uncommon **to see some faculty teaching the course with 'no text required'**. There is also overlap between broader abnormal psychology textbooks and more clinical psychopathology textbooks. These dynamics lead to more volatile market enrollment and market share shifts.

Market Trends

Market size (cumulative annual enrollment for adopted texts) decreased 2% in Fall 2021/Spring 2022 followed by another 6% decline for Fall 2022/Spring 2023. The related psychopathology market had a corresponding increase within the past year. The technology segment saw a 5% decrease in F21/S22 followed by a 1% decrease for F22/S23 (see Chart1). Currently 33% of schools teaching use a technology product like MindTap or Revel.

Cengage's share of the market decreased by 6.2% over the last three years and fell to a 3-year low of 31.5% in Fall 2022. Macmillan gained 2.6% of the market and pulled ahead of Cengage in Fall 2022. Pearson gained 5.1% of share, ending the period with a 3-year high of 20.8% in Spring 2023 McGraw-Hill gained 4.21% of market share and Wiley gained a modest 0.4% over the three-year period (see Table 1, Chart 3).

With respect to technology, Mindtap lost 5.9% of share over the last three years. **Taken together, Macmillan's Launchpad and Achieve** have gained a cumulative 1.8% of the market over the period. Revel lost a slight 0.6% of share over the period. Connect gained the most share with a 6.7% increase over the last three years (see Chart 6).

At the title level, Barlow 9e fell to a three-year low of 13.0% in Fall 2022 and lost 4.3% of share over the period. Comer 11e saw a corresponding 4.2% gain and a 3-year high of 16.6% for the same term. Comer 10e lost 1.0% of share over the period. Hooley 18e gained 0.9% of the market over the last three years and Nolen-Hoeksema 9e gained 2.2% of share (see Table 3, Chart 8).

CHART 1
Abnormal Psychology
Estimated Market Size & Tech Segment by Academic Year
Fall 2020 to Spring 2023

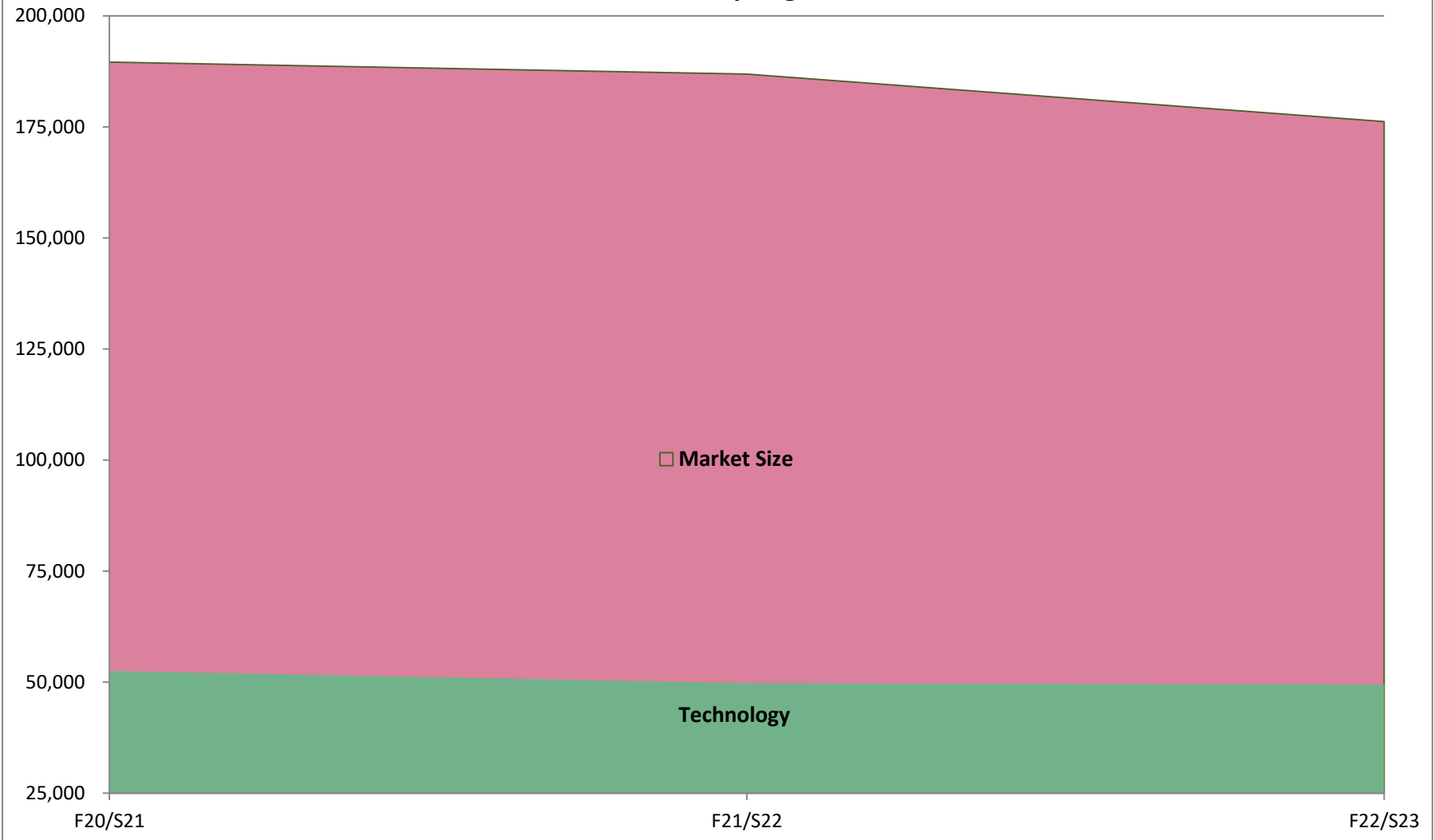


TABLE 1
Abnormal Psychology
Publisher Market Share
Fall 2020 to Spring 2023

Publisher	TOTALS		FALL 2020		SPRING 2021		FALL 2021		SPRING 2022		FALL 2022		SPRING 2023	
	Enroll	%	Enroll	%	Enroll	%	Enroll	%	Enroll	%	Enroll	%	Enroll	%
Cengage	111,638	28.9%	21,759	33.6%	19,387	28.5%	20,102	30.6%	19,819	30.4%	15,026	24.4%	15,545	25.1%
Macmillan	93,782	24.2%	14,927	23.1%	16,630	24.5%	14,830	22.6%	14,829	22.7%	16,423	26.7%	16,143	26.1%
Pearson	84,524	21.8%	13,609	21.0%	14,669	21.6%	15,407	23.5%	14,616	22.4%	13,386	21.8%	12,837	20.8%
McGraw Hill	41,532	10.7%	7,051	10.9%	5,580	8.2%	6,049	9.2%	5,962	9.1%	8,896	14.5%	7,994	12.9%
Wiley	27,390	7.1%	3,884	6.0%	4,887	7.2%	4,597	7.0%	5,358	8.2%	3,353	5.5%	5,311	8.6%
Other	27,985	7.2%	3,527	5.4%	6,790	10.0%	4,655	7.1%	4,604	7.1%	4,428	7.2%	3,981	6.4%
Totals	386,851	100.0%	64,757	100.0%	67,943	100.0%	65,640	100.0%	65,188	100.0%	61,512	100.0%	61,811	100.0%

*The above numbers are actual enrollments tracked by NAVSTEM, which represent 70% of the total 4-year market.

CHART 2
Abnormal Psych Market
Market Share for Publishers of Leading Textbooks
Fall 2020 to Spring 2023

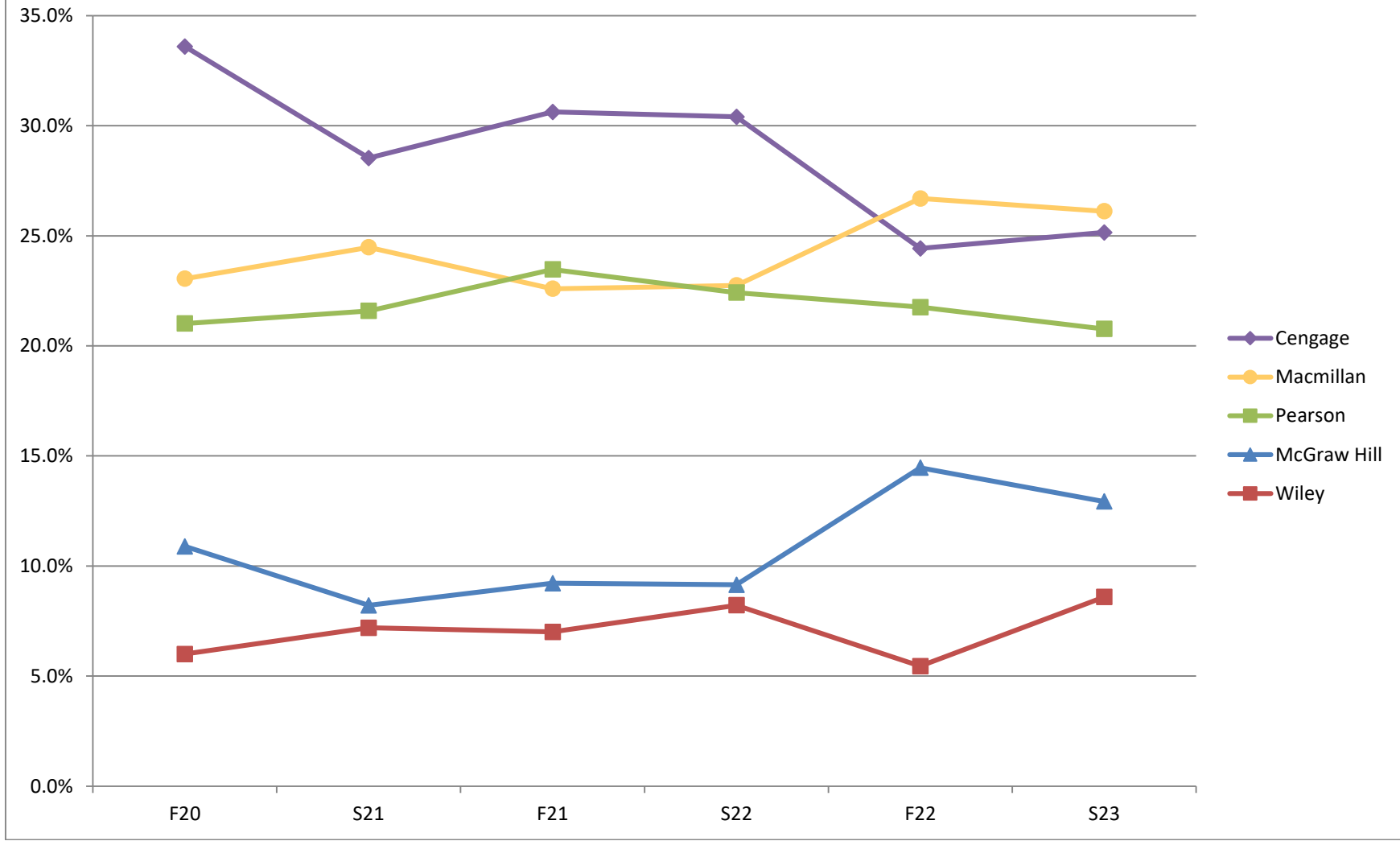


CHART 3
Abnormal Psych Market
Annual Market Share for Publishers of Leading Textbooks
Fall 2020 to Spring 2023

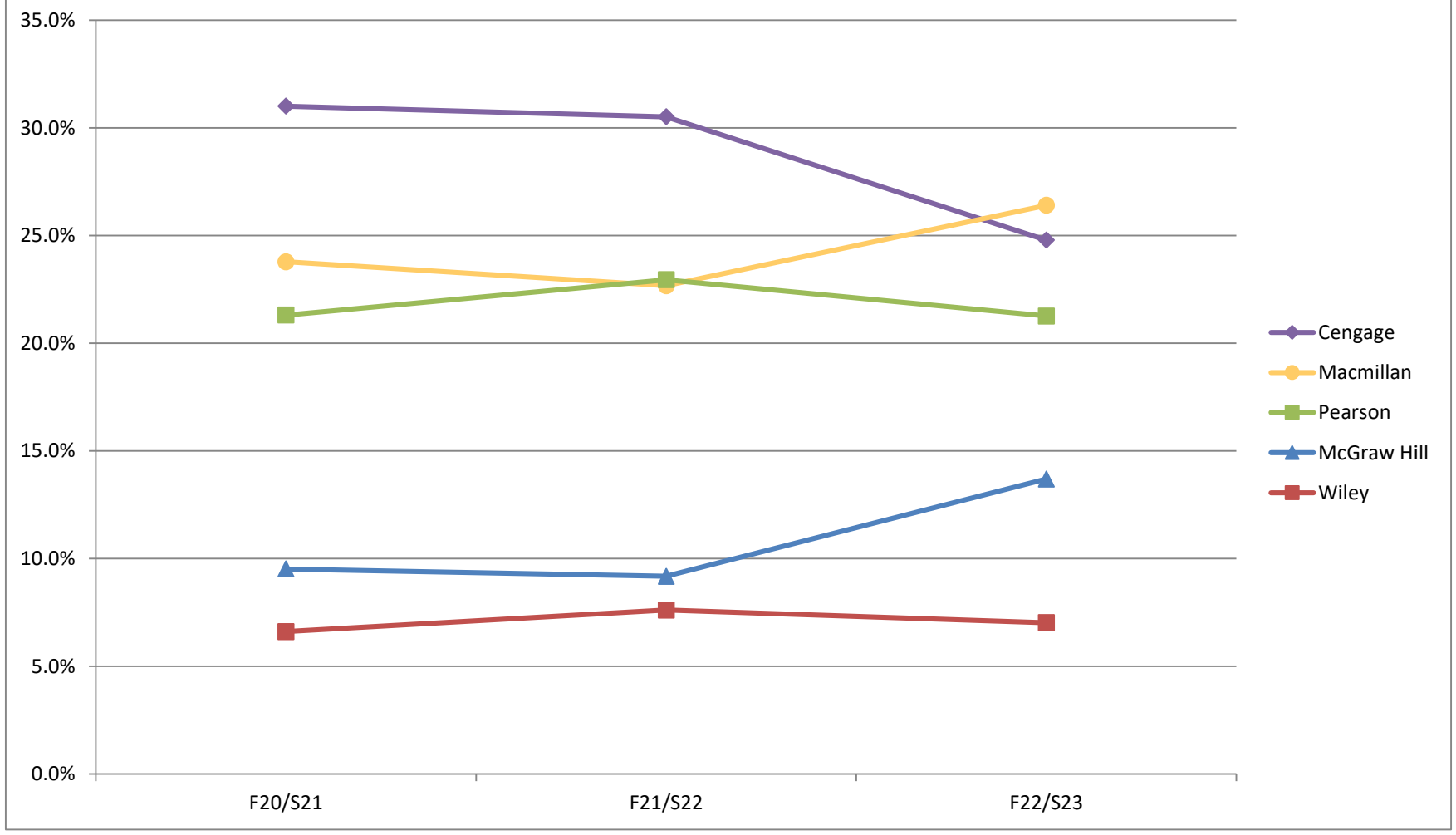


TABLE 2
Abnormal Psychology
Enrollment and Market Share of Technology
Fall 2020 to Spring 2023

Technology	TOTALS		FALL 2020		SPRING 2021		FALL 2021		SPRING 2022		FALL 2022		SPRING 2023	
	Enroll	%	Enroll	%	Enroll	%	Enroll	%	Enroll	%	Enroll	%	Enroll	%
Cengage, Mindtap	31,860	30.0%	6,896	38.9%	6,237	32.8%	4,291	26.9%	5,555	29.5%	4,565	26.8%	4,316	24.5%
Pearson, Revel	26,128	24.6%	4,123	23.2%	4,435	23.3%	4,440	27.8%	4,840	25.7%	4,213	24.7%	4,077	23.2%
Macmillan, Launchpad	21,253	20.0%	3,767	21.2%	5,203	27.3%	4,694	29.4%	4,491	23.8%	1,757	10.3%	1,341	7.6%
McGraw Hill, Connect	12,552	11.8%	1,929	10.9%	1,451	7.6%	1,745	10.9%	1,925	10.2%	2,438	14.3%	3,064	17.4%
Macmillan, Achieve	9,371	8.8%	0	0.0%	1,155	6.1%	339	2.1%	811	4.3%	3,303	19.4%	3,763	21.4%
Other	5,075	4.8%	1,029	5.8%	544	2.9%	469	2.9%	1,225	6.5%	779	4.6%	1,029	5.8%
Totals	106,239	100.0%	17,744	100.0%	19,025	100.0%	15,978	100.0%	18,847	100.0%	17,055	100.0%	17,590	100.0%

*The above numbers are actual enrollments tracked by NAVSTEM, which represent 70% of the total 4-year market.

CHART 4
Abnormal Psych
Estimated Annual Technology Enrollment
Fall 2020 to Spring 2023

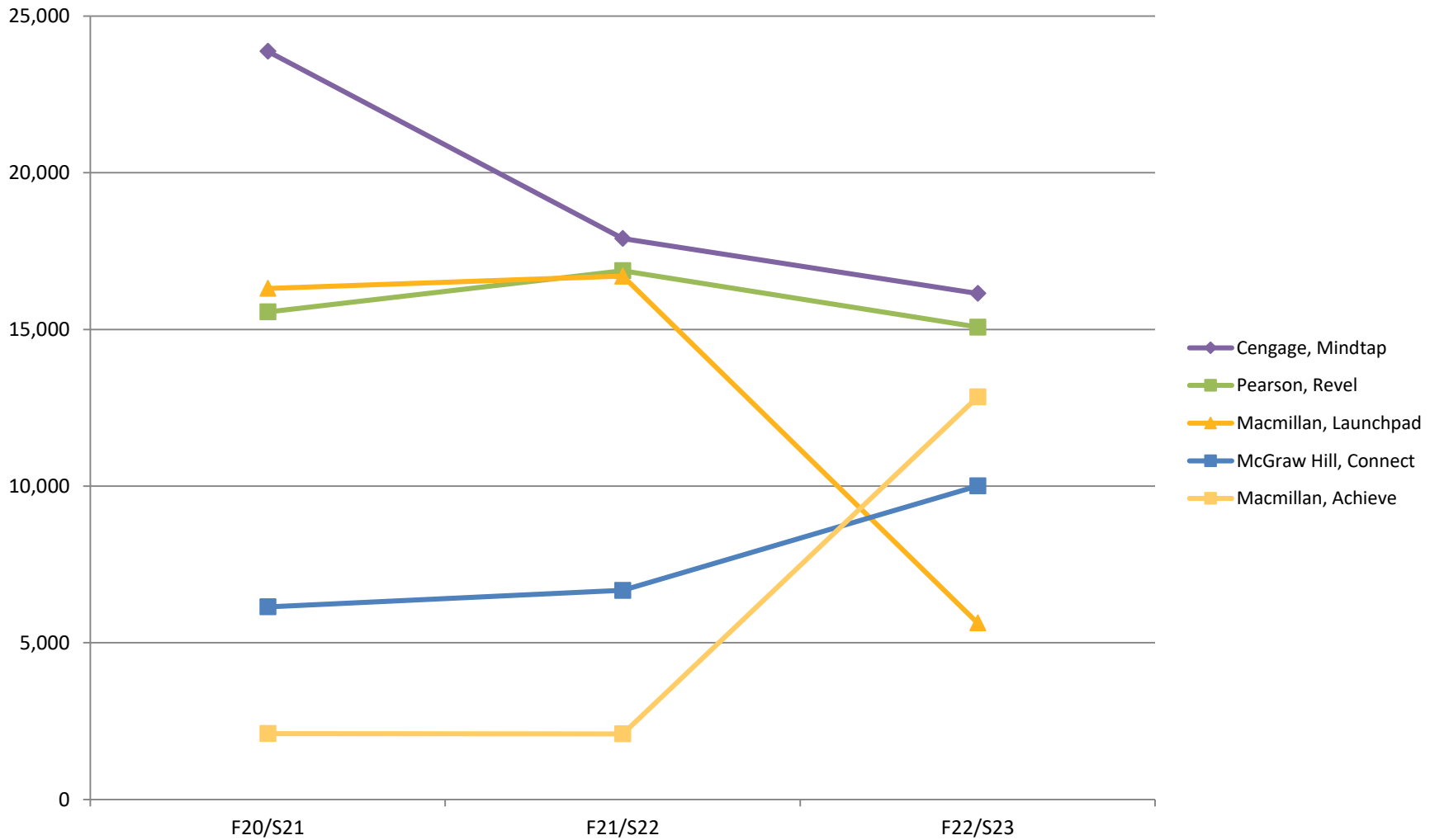


CHART 5
Abnormal Psych
Technology Market Share
Fall 2020 to Spring 2023

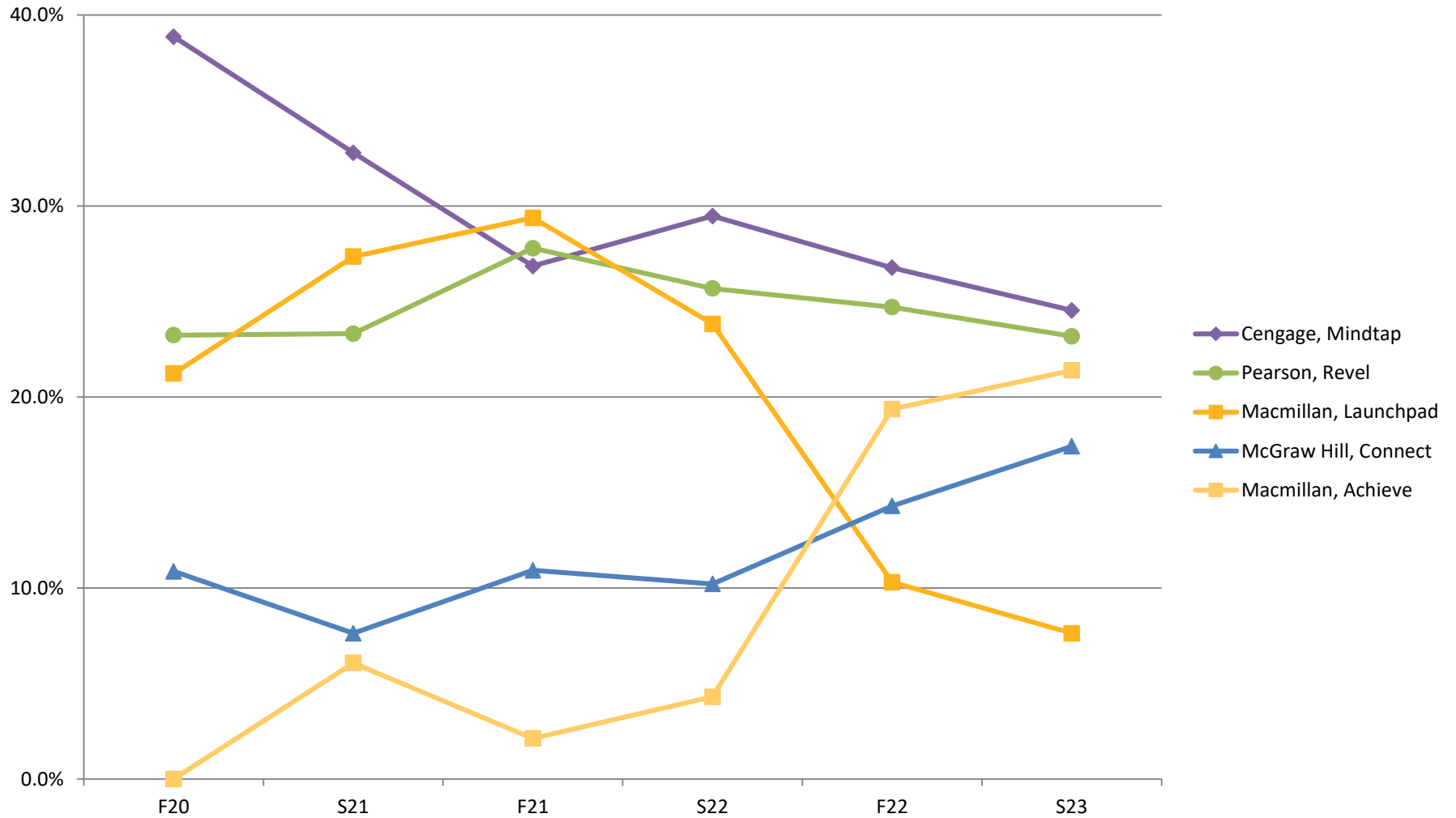


CHART 6
Abnormal Psych
Technology Annual Market Share
Fall 2020 to Spring 2023

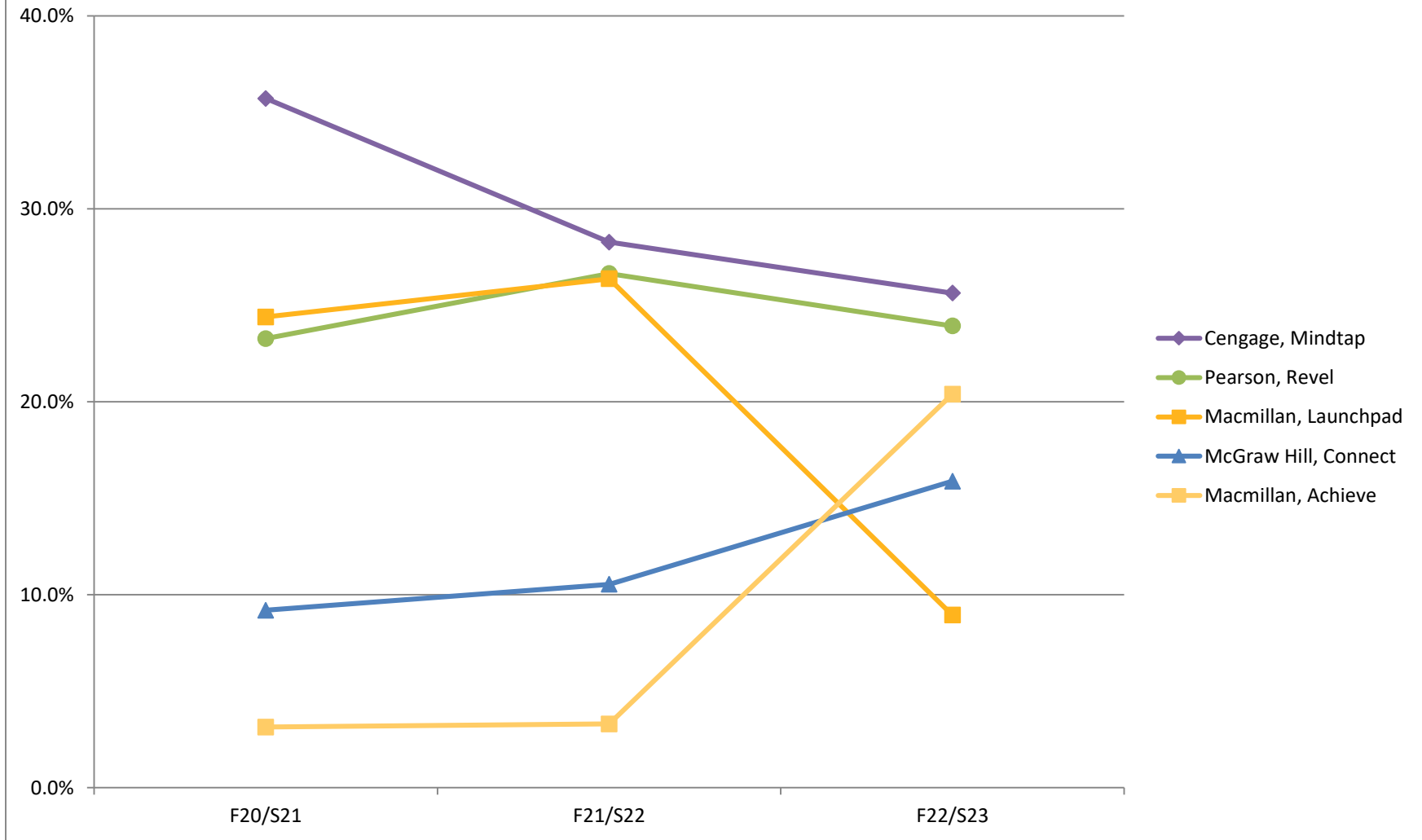


TABLE 3
Abnormal Psychology
Enrollment and Market Share by Title
Fall 2020 to Spring 2023

Title	TOTALS		FALL 2020		SPRING 2021		FALL 2021		SPRING 2022		FALL 2022		SPRING 2023	
	Enroll	%	Enroll	%	Enroll	%	Enroll	%	Enroll	%	Enroll	%	Enroll	%
Barlow 9e, '21 (Cengage)	63,567	16.4%	11,216	17.3%	12,529	18.4%	10,666	16.2%	12,397	19.0%	7,985	13.0%	8,774	14.2%
Comer 11e, '21 (Macmillan)	53,449	13.8%	7,755	12.0%	8,240	12.1%	8,697	13.2%	8,618	13.2%	10,212	16.6%	9,927	16.1%
Comer-Fund 10e, '22 (Macmillan)	36,368	9.4%	6,233	9.6%	7,660	11.3%	5,623	8.6%	5,160	7.9%	5,824	9.5%	5,868	9.5%
Hooley 18e, '20 (Pearson)	36,268	9.4%	5,643	8.7%	6,216	9.1%	6,430	9.8%	5,915	9.1%	6,831	11.1%	5,233	8.5%
Nolen-Hoeksema 9e, '23 (MH)	32,155	8.3%	5,865	9.1%	4,595	6.8%	4,691	7.1%	4,538	7.0%	6,363	10.3%	6,103	9.9%
Durand 8e, '19 (Cengage)	20,382	5.3%	5,438	8.4%	2,789	4.1%	4,581	7.0%	3,028	4.6%	2,416	3.9%	2,130	3.4%
Kring 14e, '18 (Wiley)	20,166	5.2%	2,705	4.2%	3,874	5.7%	3,444	5.2%	4,329	6.6%	1,914	3.1%	3,900	6.3%
Beidel 5e, '23 (Pearson)	17,937	4.6%	2,897	4.5%	2,490	3.7%	3,792	5.8%	3,600	5.5%	2,282	3.7%	2,876	4.7%
Sue 12e, '22 (Cengage)	14,478	3.7%	1,526	2.4%	1,394	2.1%	2,535	3.9%	2,736	4.2%	3,211	5.2%	3,076	5.0%
Nevid 11e, '21 (Pearson)	13,166	3.4%	1,688	2.6%	2,427	3.6%	2,588	3.9%	2,146	3.3%	1,667	2.7%	2,650	4.3%
Other	78,915	20.4%	13,791	21.3%	15,729	23.2%	12,593	19.2%	12,721	19.5%	12,807	20.8%	11,274	18.2%
Totals	386,851	100%	64,757	100%	67,943	100%	65,640	100%	65,188	100%	61,512	100%	61,811	100%

*The above numbers are actual enrollments tracked by NAVSTEM, which represent 70% of the total 4-year market.

CHART 7
Abnormal Psych Market
Market Share of Leading Textbooks
Fall 2020 to Spring 2023

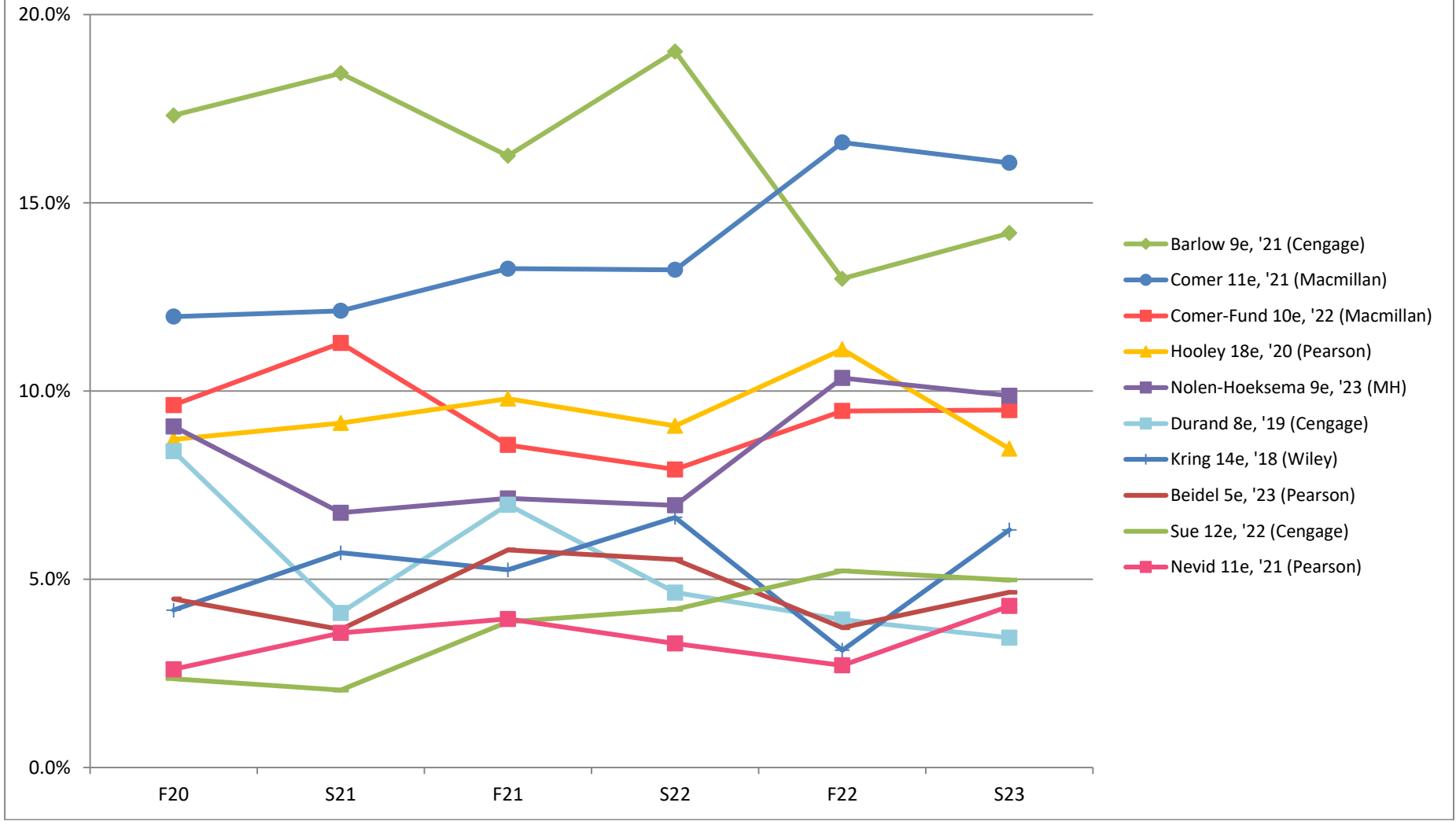


CHART 8
Abnormal Psych Market
Annual Market Share of Leading Textbooks
Fall 2020 to Spring 2023

