



Freedonia Focus Reports
US Collection

College Course Materials: United States

December 2019



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About This Report

Scope

This report forecasts to 2022 the US college course material market in nominal US dollars. Total sales are segmented by product in terms of:

- new course materials – digital media (including e-textbooks) and new textbooks (print)
- used textbooks

To illustrate historical trends, total sales and the various segments are provided for 2018.

Other data provided in this report include:

- US numbers of Title IV institutions for 2018-2019 and 2017-2018
- revenue of leading college publishers/distributors for Q3 2019 and Q3 2018

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

A full outline of report items by page is available in the Table of Contents.

Sources

College Course Materials: United States (FF25021) is based on [College Course Materials Trends and Outlook 2020-2022](#), a comprehensive industry study published by Simba Information. While Simba used sales figures from the Association of American Publishers for new course materials sales in 2018, estimates and projections in other categories in 2018 and in all categories going forward are Simba's own. Simba's estimates and projections are based on several factors including revenue patterns from major course material providers, bookstore data, use trends among students, and Simba's ongoing research.

In sizing the market segments for this report, Simba follows the procedure it established in 2015. Simba uses the market size for new course materials as provided by sales figures

About This Report

from the Association of American Publishers. Simba further breaks down that segment into new print textbooks and digital materials. Those breakdowns are Simba's own estimates based on its ongoing research in the area of instructional materials in higher education.

Simba's segment projections are its own and are reached based on several factors, including enrollment patterns, trends in student preferences for study materials and buying habits, and new-edition (or front list) publishing cycles. Additionally, Simba tapped other third-party resources.

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 5 | NAICS & SIC Codes Related to College Course Materials

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
323117	Books Printing	2731	Books: Publishing, or Publishing and Printing
424920	Book, Periodical, and Newspaper Merchant Wholesalers	2732	Book Printing
451211	Book Stores	5192	Books, Periodicals, and Newspapers
453310	Used Merchandise Stores	5932	Used Merchandise Stores
511130	Book Publishers	5942	Book Stores
512110	Motion Picture and Video Production	7812	Motion Picture and Video Tape Production
611710	Educational Support Services	8299	Schools and Educational Services, NEC

Source: US Census Bureau

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Resources

Simba Information

College Course Materials Trends and Outlook 2020-2022

The Freedonia Group

Freedonia Industry Studies

Global E-Commerce

Global E-Commerce Packaging

Retail E-Commerce Packaging Market in the US

Retail-Ready Packaging

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Advertising Services: United States

Books: United States

Commercial Printing: United States

Demographics: United States

E-Commerce: United States

Education: United States

Internet Content & Search: United States

IT Services: United States

PreK-12 Instructional Materials: United States

Printing Machinery & Equipment: United States

Software: United States

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Trade Publications

Book Business

Digital Book World

Education Week

Education World

PaperAge

University Business

Agencies & Associations

American Association of State Colleges and Universities

American Council on Education

Association of American Publishers

Campus Computing Project

Education Commission of the States

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National Association of College Stores
National Association of State Budget Officers
National Student Clearinghouse Research Center
State Higher Education Executive Officers Association
United States Department of Education