Publishing for the PreK-12 Market 2016-2017

Description: After more than a decade of No Child Left Behind and Common Core State Standards, educational publishers again face change with the passage of the Every Student Succeeds Act of 2015. Schools and the instructional materials industry are still trying to figure out the needs of students and educators, how best to meet those needs and what roles the instructional materials industry will play as schools turn increasingly to digital devices as their chief learning tools.

Publishing for the PreK-12 Market 2016-2017 provides the most up-to-date business information not only on the impact of recent changes in education policy but on the emergence of new technologies and the new applications for traditional technology (print) in the school market.

As the report navigates the current and likely future trends through 2019, a few watchwords are emerging to describe the changing state of what is estimated to be an $8.56 billion market for instructional materials: personalization, adaptive; and augmented reality.

Publishing for the PreK-12 Market 2016-2017 is the latest edition of the annual comprehensive overview of the PreK-12 market and the instructional materials providers that serve it.

Topics in Publishing for the PreK-12 Market 2016-2017 include:

- Market size by media segment: basal core curriculum, courseware, digital supplements, print supplements, manipulatives, trade books, video, classroom magazines and state summative tests;
- Drivers of and challenges to growth by segment;
- Initiatives by traditional publishers to adapt their once-print businesses to a digital future;
- Focus of ed-tech start-up activity in the first part of 2016
- Changing demographics of U.S. students;
- Trends in state funding for education;
- What subjects schools are spending on;
- The changing instructional materials adoption landscape;
- The pace of the uptake of courseware and digital supplements in schools;
- Is GoOpen a friend or foe?
- The rise of digital marketplaces;
- Exclusive 2015 instructional materials adoption data;
- Competitive analyses of 11 leading publishers;

Contents:

Methodology

Executive Summary

Chapter 1: Industry Size and Structure
Introduction
Instructional Materials Sales Flatten in 2015
Basal Curriculum Moves the Needle in 2015
Courseware Generates Growth of 4.7%
State-Level Test Market Continues to Flatten
Digital Supplements Grow 2.2%
Print Supplements Decline
Manipulatives Are Made for Hands-on Learning
Literacy Push Favors Trade Books
Video Use Grows even as Formats Change
Classroom Magazines: Strongest Growth Projection
Electronic Media Projected to Capture 70% Share in 2016
Devices Proliferate
Google Keeps Improving
Samsung Partners in Chromebook Initiatives
Publishing for the PreK-12 Market 2016-2017
Competitive Landscape
Pearson Weathers Prolonged Restructuring/Reorganization
McGraw-Hill IPO Remains Pending
Rosetta Stone Turns its Attention to Education
Ed Tech Startup Activity Was in High in 2015
M&A Activity Aims to Strengthen Core Missions
Table 1.1: Instructional Materials Segment Definitions
Table 1.2: Sales of Print & Digital Instructional Media to the U.S. PreK-12 School Market, 2014-2016P
Table 1.3: Market Share of Media Sold to U.S. Classrooms, 2016P
Table 1.4: U.S. Shipments of K-12 Personal Computers by Operating System
Table 1.5: PreK-12 Performance Index
Table 1.6: Q1 2016 K-12 Startup Company Activity
Table 1.7: Mergers & Acquisition Index, 2015 and H1 2016

Chapter 2: Enrollment and Demographics
Introduction
Public School Enrollment on the Rise
Enrollment Patterns Vary across the States
Private Enrollment Sees Declining Trend
Charter School Enrollment Booms
Online Enrollment Growing as Virtual Schools Increase
Homeschooling Hard to Measure
High-Poverty Schools Are a Target
Schools Growing More Diverse
Special Needs Students Require Services
State-Funded PreK Enrollment Grows
Table 2.1: Institutional Types and Numbers, 2016
Table 2.2: Total Public PreK-12 Enrollment, 2015-2024P
Publishing for the PreK-12 Market 2016-2017
Table 2.3: Projected Public PreK-12 Enrollment by Grade, Selected Years, 2014-2024P
Table 2.4: Public School PreK-12 Enrollment by State, Projected % Change, 2015-2024
Table 2.5: Private School Enrollment over Time
Table 2.6: Charter School Enrollment over Time
Table 2.7: Charter Schools and Enrollment by State 2014-2015
Table 2.8: Number of Students Enrolled in Full-Time Virtual Schools by State, 2014-2015
Table 2.9: Homeschooled Students by State
Table 2.10: Top 10 Home Languages of ELLs
Table 2.11: 20 School Districts with Largest ELL Student Populations, 2013-2014
Table 2.12: 20 School Districts with Largest Special Education Student Populations, 2013-2014
Table 2.13: Preschool Enrollment, 2014-2015 & % Change from 2013-2014

Chapter 3: Policy & Funding
Introduction
Federal Education Policy Guided by ESSA
What ESSA Requires
ESSA Implementation Begins
Where ESSA Offers Opportunities
Federal Funding up in Fiscal 2016
Federal Budget for Fiscal 2017 TBD
Title I Targets Low-Achieving Students in High-Poverty Areas
Tapping Special Education Funding
E-Rate Provides Record Levels of Funding
State-Level Funding Outlook Improves Slowly
Funding Rises in California
Florida's Funding Rise Includes Money for Technology Infrastructure
Opportunities Narrow in Some Smaller States
Publishing for the PreK-12 Market 2016-2017
State Funding Trends over Time
Local Funding Varies Widely
State PreK Funding Climbs
Funding Opportunities Lead to Procurement
Table 3.1: Accountability: Then and Now
Table 3.2: U.S. Department of Education Discretionary Spending, FY 2015-FY 2017
Table 3.3: Top 8 Disciplines for Textbooks in Adoption States, 2015
Table 3.4: Adoption Publisher Scorecard, 2015
Table 3.5: Approved Programs in English Language Arts/English Language Development for 2016 California Adoption

Chapter 4: Basal Curriculum and Adoptions
Introduction
Segment Size and Investing in the Future
Getting Personal
G-W : Expanding Markets
Preparing for Platforms
Adoption States and Open Territories Markets
Top Disciplines in Open Territories
Going Digital Opens Adoptions States
Second-Year Math, Social Studies Topped Adoption Opportunity
McGraw-Hill Education Tops 2015 Adoption Publisher Scorecard
Pearson Secures 2nd; HMH in 3rd
Adoptions Outlook in 2016 and Beyond
California: a Sweet Spot, Eventually
States Opting for Science
Publishing for the PreK-12 Market 2016-2017
Table 4.1: Segment Definition
Table 4.2: Basal Curriculum Share of Instructional Media Used in U.S. Classrooms, 2014 vs. 2015
Table 4.3: Top 8 Disciplines for Textbooks in Adoption States, 2015
Table 4.4: Adoption Publisher Scorecard, 2015
Table 4.5: 2016 Leading Sales Opportunity in Adoption States
Table 4.6: Approved Programs in English Language Arts/English Language Development for 2016 California Adoption

Chapter 5: Digital Instructional Materials
Introduction
Courseware Sales Are Increasing
CTE is a Driver of Courseware Sales
Courseware is More than Online Courses
Digital Supplemental Material Complements Core Curriculum
Teacher Survey Reveals Digital Supplemental Use
Video Is Used More; Formats Are Changing
Future of Video
Table 5.1: Segment Definitions
Table 5.2: Courseware Share of Instructional Media Used in U.S. Classrooms, 2014-2015
Table 5.3: Digital Supplements Share of Instructional Media Used in U.S. Classrooms, 2014 vs. 2015
Table 5.4: Use of Specific Instructional Software Programs
Table 5.5: Use of Specific Games
Table 5.6: Video Share of Instructional Media Used in U.S. Classrooms, 2014 vs. 2015
Table 5.7: Teachers’ Sources for Video Used in Classroom

Chapter 6: Trends
Publishing for the PreK-12 Market 2016-2017
Introduction
Fresh Science Programs from McGraw-Hill and School Specialty
Confronting and Incorporating OER
Working with GoOpen
A View from the Schools on OER
Views from Publishers on OER
Strength in Depth and Breadth
Adapting to OER Proliferations through Aggregation
New Ways of Going to Market
New Ventures for Vetting Products
Online Marketplaces
And Then There Is Amazon
Professional Services
Table 6.1: Next Generation Science Standard States
Table 6.2: Most Common Source for Digital Materials in the Classroom
Table 6.3: The Business of Vetting Instructional Materials

Chapter 7: Conclusions & Outlook
Overall Market Conditions Going Forward
Flat Outlook for Basal Curriculum
Upward Trajectory for Courseware
State Tests Face Significant Change
Digital Supplements & Video Expect Growth
Print Supplements Decline Projected
Manipulatives, Trade Books and Magazines Are Primed for Growth
Table 7.1: Sales Forecast of Key Instructional Materials Used in U.S. Classrooms, 2015-2019

Company Profiles
Cambium Learning Group
Discovery Education
Publishing for the PreK-12 Market 2016-2017
Goodheart-Willcox
Houghton Mifflin Harcourt
K12 Inc.
McGraw-Hill Education
Pearson
Rosetta Stone, Inc.
Scholastic Corp.
School Specialty
Scientific Learning Corp.

Ordering:
Order Online - http://www.researchandmarkets.com/reports/3816878/
Order by Fax - using the form below
Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit
http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: Publishing for the PreK-12 Market 2016-2017
Web Address: http://www.researchandmarkets.com/reports/3816878/
Office Code: SCWP7RWS

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Format Type</th>
<th>Quantity</th>
<th>Price (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User:</td>
<td></td>
<td>3250</td>
</tr>
<tr>
<td>Electronic (PDF) - 1 - 10 Users:</td>
<td></td>
<td>9750</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprise-wide:</td>
<td></td>
<td>19500</td>
</tr>
</tbody>
</table>

* The price quoted above is only valid for 30 days. Please submit your order within that time frame to avail of this price as all prices are subject to change.

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: [ ] Mr [ ] Mrs [ ] Dr [ ] Miss [ ] Ms [ ] Prof
First Name: ____________________________ Last Name: ____________________________
Email Address: * ____________________________
Job Title: ____________________________
Organisation: ____________________________
Address: ____________________________
City: ____________________________
Postal / Zip Code: ____________________________
Country: ____________________________
Phone Number: ____________________________
Fax Number: ____________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World