



## CONSUMPTRIX: LEARNING CONTENT CONSUMERS—FACULTY AND STUDENTS

**Consumption of course materials is a complicated mix of faculty control of content choice and student management of purchase, obtaining otherwise, or foregoing the content.**

**Students (and faculty) still prefer print, but potential cost savings and a better learning experience can and is fueling the transition to digital content—especially adaptive learning courseware and platform-based products. OERs, low-cost and tradition-bucking entrants, and federal/state intervention are motivating an evolution of historic consumption and business models. The primary concern may be what happens to learning and academic success if more and more students choose not to obtain learning materials at all.**



### Key Points

1. Advocates of instructor autonomy argue that it encourages intellectual diversity, leverages instructor expertise, places decisions with those best able to judge student needs, and reduces the risk of political intrusion on curricular decisions. Yet it limits the ability to achieve economies of scale (volume purchases) and discourages large-scale assessment of course material effectiveness. Some also suggest it lies at the heart of rising prices by separating textbook choice and payment.
2. The risk of breaking the link between faculty learning content adoption and assignment and student study/reading behavior has far-reaching implications for the learning content ecosystem.
3. Digital course materials that provide a better learning experience and a significant cost advantage could overcome today's students' apparent preference for print.
4. Publishers have begun marketing and white labeling entire online courses.
5. As affordability and success pressures build and new learning products and business models emerge, colleges and universities are likely to experiment with strategies that shift adoption away from autonomous faculty and toward academic leadership and high-volume sales.
6. Students, for their part, have also enjoyed an expanding range of acquisition options. However, students increasingly are avoiding acquisition altogether.
7. Select key trends include: Widespread reliance on adjunct/part-time faculty and the related centralizing of course materials decision making; growing resentment about the rising cost of textbooks; declining student time spent reading and low utilization of required learning content; rising availability and sophistication of digital content, including adaptive learning platforms; and growing student use of contemporary retail shopping techniques, use of free web sources, pirating of content, or avoiding acquisition altogether.

# Mapping the Learning Content Ecosystem

## SCORECARD

### CONSUMPTRIX: Learning Content Consumers— Faculty and Students



#### Supplier Power

- Power of publishers may be waning
- Publishers' steady, core business of print textbooks is in trouble
- Traditional, print textbooks are becoming easier to replace with other materials
- OER competition and low-cost publishing start-ups are driving an evolution of the traditional consumption process

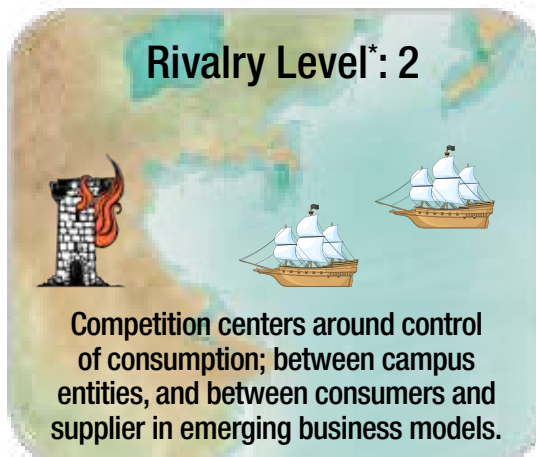


#### Buyer Power

- Buyer bargaining power is on the rise
- Better cost information and more purchase options improve buyer position
- More no-cost content and online educational resources (formal and informal) provide alternatives to the traditional textbook



#### Rivalry Level\*: 2



#### New Entrants

- New breed of low-cost publishers and other sources keen to offer something “radically different”
- “Edupreneurs” strive to make content available that bypasses long-established higher education practices
- Federal and state governments may play increasingly invasive roles through regulation and cost subsidy



#### Substitutes

- Software platforms and next-generation digital products may eliminate some alternative consumer options
- Changes that affect control over assignment and use:
  - Institutional licensing agreements
  - Self-sourcing and other student cost avoidance strategies
  - Student marketplaces and social commerce/sharing sites

\*Rivalry is an indication of competition in the segment from 1-lowest to 5-highest; both among current players and between them and new entrants.



## **Critical Questions: Learning Content Consumers—Faculty and Students**

- 1. What is the faculty make-up on your campus: tenure-track versus adjunct/part-time?*
- 2. Where are the course material adoption decisions being made on your campus? Are there any trends that can be identified to suggest a shift in faculty authority in these decisions?*
- 3. To what extent are digital, adaptive courseware products and platforms being used on your campus? Is there a trend of increased use?*
- 4. To what extent are OERs being used on your campus? Is there evidence of a trend?*
- 5. Are there discussions occurring on campus about content licensing/course fee models, course licensing, and/or use of MOOCs? Is the college store involved in (or leading) these discussions?*
- 6. What is the level of course materials price sensitivity on your campus? Who are the vocal/active stakeholders? How are their concerns manifesting, and how is the campus store addressing their concerns?*
- 7. What market share of adoptions does the store have? What percent of students are purchasing and using the required course materials and supplements (indicated by your sell-through, feedback from students, comments during Buyback, and other measures)?*
- 8. What strategies and initiatives does the store have underway or planned to maximize course materials access and affordability for students?*
- 9. In what ways is the campus store partnering with/serving faculty and students to maximize the ROI of learning content and course materials?*