

**Research on the Textbook Publishing Industry in the United
States of America**

Michael G. Watt

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Biographical note

Michael G. Watt taught in several secondary schools in Tasmania, and worked as an education officer in the Tasmania Department of Education. He holds masters' degrees in educational studies and education from the University of Tasmania, and a doctorate in education from the University of Canberra. He currently works as an education consultant.

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Abstract

The purpose of this article was to review published research literature about the publishing process and the roles of participants in this process in the textbook publishing industry in the USA. The contents of books, collected works, reports and journal articles were analysed, and summaries of the contents were then organised chronologically to present a commentary on this topic. The results showed that the main facets of the textbook publishing industry arose in the early nineteenth century. Several surveys conducted in association with a report on textbooks issued in 1931 indicated that procedures for selecting authors, their role, and the methods they applied were well defined at this time. Commentators reporting on textbook publishing in the 1950s and 1960s depicted an industry in which the publishing process and the roles of authors, editors and sales people had been institutionalised for many years. However, the textbook publishing industry of that time was faced by the challenges of integrating new technologies in printing and new media for presenting materials. Commentators writing in the 1990s were more concerned to analyse changes in the textbook publishing industry occurring in response to globalisation. Mergers and takeovers, resulting from reductions in profit margins faced by many textbook publishing companies, led to the incorporation of textbook publishing activities within multinational media, communications and entertainment conglomerates, whilst small emerging textbook publishing companies filled a vacuum in the marketplace as niche publishers.

Key-words

publishing industry, textbook preparation, textbook publication, textbooks

Research on the Textbook Publishing Industry in the United States of America

The development of modern practices in textbook publishing in the USA was concomitant with the rise of mass education, characterised by graded organisation of formal schooling into classes. It is associated with the publication and marketing by the Cincinnati publishing firm, Truman and Smith, of *McGuffey's Eclectic Readers*. In 1834, Truman and Smith approached William H. McGuffey, a preacher and teacher at Miami University in Oxford, Ohio, to write a series of four graded readers suitable for the common schools being established in the mid-western states. The first and second readers were published in 1836, and followed by the third and fourth readers and a primer in 1837. After the initial compilation, McGuffey's brother, Alexander compiled a fifth reader in 1843 and sixth reader in 1857. Editors revised the series in 1844, 1859, 1879 and finally in the early 1900s. McGuffey signed a contract guaranteeing a royalty, and provided the manuscripts to the publisher, who engaged sales people to visit the expanding number of schools in the mid-western and southern states. Within a decade, *McGuffey's Eclectic Readers* had penetrated this market, selling at a rate of two million copies each year, and eventually exceeded sales of over 122 million copies before their use declined in the 1920s. In 1841, Smith brought out the partnership, and the company's name changed several times before it merged with other publishers in 1890 to form the American Book Company, which established a monopoly controlling most of the textbook market across the USA in the first decades of the twentieth century. This monopoly prevailed until rivalry from smaller companies opened up the publishing industry to greater competition after World War I and sales of *McGuffey's Eclectic Readers* declined because of changing values and new curricular demands. Bohning (1986) concluded that *McGuffey's Eclectic Readers* offered improved educational features over other texts of their time, whilst mechanical innovations in printing and the skilful marketing practices of the publisher made them available to millions of children. Since *McGuffey's Eclectic Readers* established a graded format, controlled word repetition and sentence length, incorporated moral lessons, provided teaching suggestions, and added exercise aids, they met the needs of the common school movement, the free public schools spreading across the country as the American frontier expanded westwards.

In the commentary to a bibliography of research literature on textbooks, Woodward et al. (1988) concluded that the textbook publishing industry in the USA remains both cryptic and inaccessible. Little research has been published about the role of authors, the production of textbooks, the influence of the marketplace, and the economics of the textbook publishing industry. Within the coverage of research literature on the textbook publishing industry, Woodward et al. identified two types of research, one laudatory and the other factual and anecdotal. The former encompassed articles authored by publishing company executives praising the quality of their publications. The latter included reports on the process used by publishing companies to develop textbooks, often treated in an historical context. Such issues as copyright dating, the employment of authors for their professional authority, the role of in-house development departments, content coverage, design features, learner verification and revision, and corporate mergers were covered in these reports.

The purpose of this article is to review published research literature about the publishing process and the roles of participants in this process in the textbook publishing industry in the USA. Although acknowledging the conclusion reached by Woodward et al. about the paucity of research literature on this topic, the body of literature on the textbook publishing industry in the USA covered in this review presents a comprehensive set of research findings on this topic. Since this critical commentary presents a coherent picture concerning the interaction of these factors in the materials' marketplace, the review of an extensive body of research literature on this topic is likely to increase the reader's understanding about the complex interactions occurring between the development, selection and use of textbooks.

Methodology

The first step in identifying research literature on the textbook publishing industry in the USA was to consult the bibliography published by Woodward et al., which provided an annotated list of references. Woodward et al. noted that the history of research on aspects relating to the textbook publishing industry in the USA has been sporadic. Major contributions were made to research in studies reported by the National Society for the Study of Education in 1931, Cronbach in 1955, and the National Society for the Study of Education in 1990. Searches of the Educational Resources Information Center (ERIC) database and other sources, made to update the references provided in the bibliography, identified citations to four more recent publications. Information obtained from citations identified from these searches, covered books, collected works, reports, and journal articles.

Content analysis method was applied to analyse these documents. Once copies of available documents were obtained from library collections, they were read and summaries prepared. These summaries were then organised chronologically, and incorporated into the following commentary. This commentary, which analyses the most significant literature published on this topic since the early 1930s, treats the nature of the publishing process and the roles of participants in the publishing process.

Results

Several surveys conducted in association with the report issued by the National Society for the Study of Education in 1931 elicited data about the role of authors, their backgrounds and selection, and the methods they applied. From surveying 35 publishers, Jensen (1931) found that the respondents usually selected authors through personal contacts with their field representatives, and preferred professional educators to lay people as textbook authors. The respondents selected manuscripts for textbooks by applying three main criteria: judging whether there was a need for a new material; judging whether the material was innovative; and judging whether the author was competent. However, the respondents reported that only 5 percent of unsolicited manuscripts were accepted. The respondents indicated that they actively sought the reactions of teachers and subject specialists about manuscripts before acceptance. They reported that their

staffs studied various reports on materials, as a means of anticipating needs for new materials. They indicated that editorial staffs had wide responsibility for judging manuscripts, and controlling revision and reorganisation of accepted manuscripts. Some respondents reported piloting manuscripts in classrooms before publication.

Richey (1931) reported conducting content analyses of 1,562 textbooks, published over a 50-year period from 1876 to 1926, to determine the professional status of the authors. The findings indicated that the occupations of the 1,055 authors of 1,174 textbooks, 75.2 percent of the sample, could be classified according to professional connections. Of these authors, 39.3 percent were affiliated with higher education, 22.1 percent were associated with elementary and secondary schools, 14.1 percent were superintendents, 3.4 percent held other school positions, 4.3 percent were members of publishers' staffs, 6 percent belonged to occupations outside education, whilst 10.8 percent were unemployed. Over this period, it was found that the proportion of authors associated with higher education increased markedly, the numbers of authors associated with schools showed little change, and authors from other occupations decreased. Within the former category, the numbers of authors affiliated with faculties of education in institutions of higher education increased rapidly from zero at the beginning of the period to constitute two-thirds of authors associated with higher education at the end of the period.

Schorling and Edmonson (1931) reported surveying members of the National Society for the Study of Education and the American Educational Research Association in 1929 to identify whether authors of elementary textbooks in spelling, arithmetic and social studies applied research findings and used scientific methods to develop their materials. They concluded that authors of spelling texts used standard word lists extensively, but that there was less research evidence that scientific principles were applied for grade placement, items of organisation, and decisions relating to method. Although authors of arithmetic textbooks generally applied research evidence to select content, there was less evidence that research findings were applied to determine grade placement and appropriate methodologies. Although authors of some social studies textbooks applied research evidence to select content, establish an appropriate readability level, and provide for individual student differences, there was no evidence that most authors applied scientific principles.

Two articles published in a collected work edited by Cronbach on the purpose of textbooks, their publication and use examined the role of authors and the publishing process. Bierstedt (1955) discussed the role of textbook authors in transmitting knowledge and culture. Financial benefits, rather than associational involvement or increased status, offered by publishers to prestigious members of the education community should be recognised as the main reason why authors write textbooks. The variable quality of authors and the wide range of manuscripts modified into textbooks may result from fluctuations in the business cycle at different times. Authors cannot be identified readily by demographic characteristics, such as age, sex or marital status. Affiliations between authors, however, may be determined by political allegiance evident in the transmission of a culture in the form of manifest aspects or knowledge, as well as latent aspects or customs and myths. Ethnic heritages, regional variations in backgrounds, and the predominantly

middle-class backgrounds of authors were likely to be reflected in the cultural values presented in authors' textbooks. Bierstedt classified the ideologies transmitted in textbooks by authors into four categories. First, the stimulus of financial gain motivating most authors was likely to be reflected in the presentation of an ideological preference for free enterprise. Second, the reflection of liberal political persuasions of most authors was likely to be tempered by the more conservative political ideology of the wider community. Third, the division of the education system into public and Catholic sectors meant that authors presented either secular or religious values appropriate to the particular sector. Fourth, the academic status of authors may lead to a predilection to exaggerate the importance of intellectual curiosity, scepticism, or scientific method. The subject specialisation of an author may also lead to the depiction of professional bias towards the particular discipline conveyed in a textbook. Bierstedt concluded that whilst authors were subject to social and ideological pressures, they also contributed to changing values and attitudes through their textbooks.

Schramm (1955) examined implications of economic, technological and human factors on the textbook publishing industry in the late 1940s and early 1950s. The textbook publishing industry was characterised by being almost entirely controlled by private enterprise, small-scale in its operations, modest in its growth, limited to approximately 75 companies, general rather than specialised, and subject to constant changes resulting from interactions between authors, publishers and teachers. An analysis of data published by the American Textbook Publishers Institute for the years 1939, and 1946 to 1952 indicated that approximately half of the income from sales was expended on production costs, and the prevailing low margins were decreasing. The economics during this period shifted with a decline in the market for college textbooks and an increase in the market for elementary school books. This shift increased the costs involved in marketing, because a greater number of sales people needed to be employed, and depositories had to be maintained in some states. The greatest cost in marketing, however, was that lost in capital tied up in unsold books, although this may have been lessened by the seasonal nature of sales over a period of several years. Schramm viewed the textbook publishing industry as innovative to the extent that its products needed to be ahead of market demands, although there were few means available at that time to check the effectiveness of such innovations. Innovations were unlikely to increase, unless brought about by new technological advances in printing or diversification in the media of products. The main technological factor affecting production in the 1950s was the widespread use of machine typesetting, which was cost-effective for large runs suitable for national editions, but inefficient for producing small editions, or presenting illustrations and colour. Editorial decisions, such as text readability and comprehensibility, also affected production. An important problem that confronted the publisher of the time related to determining the best ways of integrating different media within the publishing enterprise to produce multimedia materials. Human factors were categorised according to different roles performed in the textbook publishing industry. The role of the editor was identified as the most important within the publishing process. It involved assembling and coordinating a team of authors, and overseeing the manuscript through the steps of editing, design and manufacture. The role of sales people became more important, since they were responsible for finding authors, reporting sales trends, as well as

selling materials. Schramm believed that the rewards for these groups were predominantly economic, and their motivations largely determined by the influences their materials had in schools. Their influence on the publishing process was felt in the physical design, the scope and sequence of the content, and the presentation of textbooks. Schramm recommended that research on textbook publication should be directed to four areas: improving understanding about the processes of making text; identifying cost barriers; determining the nature of learning from text; and evaluating their use through field studies.

In a collected work surveying book publishing, the steps in trade book publishing and other areas of publishing, Brammer (1957), managing editor of the American Book Company, reported on the textbook publishing industry in the USA in the 1950s. It was competitive, and required large expenditures on editorial departments and promotional staffs for servicing schools. Editorial departments consisted of executive, subject matter and grade-level editors, supported by editorial assistants, many of whom were drawn from the teaching profession. In addition, typographers, art editors and production editors were required, playing a minor but important role in the publishing process. Brammer argued that publishers and editorial staff played predominant roles in developing, revising and editing new materials. Authors were usually chosen by publishers, and offered contracts stipulating royalties in exchange for all other rights. Writing involved a cooperative process between publishers, authors and editors. Greater attention to production techniques at that time had increased the costs of producing materials, and led publishers to employ designers, art editors and production experts. Publishers also maintained large forces of promotional staff for selling, distributing and demonstrating new materials, although their activities were controlled by regulations governing adoption at the state and local levels. Brammer concluded that textbook publishing in the USA, in contrast to many other countries, was controlled almost entirely by private publishing enterprise with little involvement by federal and state governments.

Black (1967) argued that the textbook publishing industry needed to adjust to the increasing rate of change in education, because of the important role of materials in schools. By describing the publication and marketing of Harper & Row's textbook, *Today's Basic Science*, during the early 1960s, Black covered nine sequential steps in the publishing process. Preliminary steps consisted of planning, researching the market, and appointing an editor. Then a working relationship was established between the editor and authors leading to the development of drafts. Readability formulas were applied, and the text was edited to an appropriate reading level. Controversial topics were treated. The text was illustrated using a team of free-lance artists overseen by an art director. The published textbook was marketed, initially in Florida to teachers, district selection committees and the state selection committee prior to adoption. A competitor's attacks were countered by challenging the competitor's product. The textbook was revised to produce a new edition incorporating depictions of minority groups in illustrations. The activities of the main personnel involved in developing, publishing and marketing textbooks were characterised by particular features. The authors of textbooks, generally experienced teachers identified through their prominence in education, offered the endorsement of authorship to the product rather than their contribution to the writing process.

The careers of editors, who were often frustrated teachers, were usually limited to editing only a few texts. Large companies employed from 100 to 150 sales people, who covered defined territories, often working with consultants to visit teachers in schools, appearing before selection committees, and gaining expertise about their employers' and competitors' products. The characteristics of conformity in the nature of textbooks were associated with testing the strength of their bindings in the laboratory, the treatment of controversial topics often by omission, the conventional organisation of the content, and the high financial stakes involved in developing and marketing them. By referring to an innovative mathematics textbook, *Seeing Through Arithmetic*, developed by Scott, Foresman and Company between 1941 and 1964, breaking the mould of conformity involved increasing expenditure on development over this period in anticipation that changing trends in mathematics education would lead to increasing sales. Publishers dealt with controversial topics in textbooks in response to pressures exerted by interest groups and selection committees seeking the elimination of bias, rather than taking their own initiatives.

Presenting one of the few accounts written by a publishing executive, Jovanovich (1969) contended that the textbook publishing industry in the USA arose about 1880 in response to greater uniformity in local education systems resulting from immigration and industrialisation. These social and educational changes led to the development of a profitable textbook publishing industry that went unchallenged in its processes and products until the advent of the curriculum reform movement in the 1960s. The federal government funded curriculum development projects to produce materials in a range of media, which influenced publishers to match this change by producing products using various media. Technological improvements in printing, such as the introduction of rotary presses, offset printing, new techniques in binding paperback books, setting type photographically or electronically, and electrostatic printing, stimulated publishers into producing high quality products in terms of design.

Edgerton (1969), an editor for a major textbook publishing company, examined the application of the publishing process to develop social studies textbooks. Authors rarely presented completed manuscripts to publishers, but were generally discovered by editors at conventions, or by sales representatives reporting back on promising teachers. The preference for authors to be practising rather than retired teachers, and motivated by the desire to improve education were important characteristics sought by publishers. Contracts between an author and a publisher were negotiated over a period of time on a flexible basis. The role of the editor involved coordinating a team of authors, illustrators, critical readers, and other participants by evaluating plans, identifying strengths, eliminating faulty practices, and reinforcing the work of the developmental process. Edgerton identified four stages through which a textbook proceeded during the publishing process. The pre-writing stage involved matching an identifiable educational need with an author capable of meeting it by specifying a proposal for consideration by a new publications committee. If approved, a writing plan was drawn up naming authors, subject-matter consultants, a graphics team, other specialists, and managers. The second stage, which involved writing and editing the textbook, consisted of four steps. First, the editor evaluated the readability, style and accuracy of the draft chapters prepared by the author. Second, detailed editing followed, when sufficient

chapters of the textbook were available. Third, artwork and maps were integrated through consultation between the editor and the art editor. Fourth, the manuscript was field-tested by employing teachers as critical readers or trying it out with students before final editing. The third stage consisted of transferring the manuscript to print through a series of six steps. First, graphics work was completed. Second, the manuscript was sent to a composition house to be set in type. Third, the author edited the galley proof. Fourth, the graphics editor included the illustrations. Fifth, corrections were made, type was adjusted to page length, and the index and acknowledgments were included in preparing the page proof. Sixth, the reproduction proof and illustrations were positioned on pattern pages, a procedure known as 'dumming'. The fourth stage involved manufacturing by a printer and binder through plate-making, lithographic printing, and binding followed by distribution. In addition, a textbook was usually supplemented with a teacher's guide, which was often available before the student textbook, so that free copies could be made available to selection committee members and subject coordinators.

Bragdon (1969), a retired history teacher reporting from personal experience as a textbook author, described the writing and editing of an American history textbook series, *History of a Free People*, over a twenty-year period. Approached by a Macmillan vice president, Bragdon reported the publisher accepted his suggestions about organising the text, appointed a co-author and an editor, who worked as a team without directions from the publisher except for technical matters. The publisher, however, imposed three restrictions. Initially the team was required to write according to readability formulas under the supervision of a curriculum consultant. The American Civil War had to be called the War Between the States as a concession to the southern market. The design of the textbook reflected concessions to market needs with new editions being published every two years. Although the subject matter was criticised by conservative pressure groups, the publisher advised ignoring them rather than challenging or accepting their demands in the interest of furthering commercial success. Bragdon became concerned by two issues as development of the textbook proceeded. First, the organisation of the content in the textbook to facilitate its use for memorising and regurgitating facts was not overcome, in spite of including a sketch of an historical figure of the time, a short essay, and questions to prompt further study or discussion. Furthermore, this limitation was not acknowledged in the teacher's guide. The publication of a supplementary material, presenting history as dealing with people and a series of supplementary materials on source documents for talented students, intended to surmount this shortcoming was likely to be ignored by many teachers. Second, concerns to reduce the length of the text led to simplifications, the lack of comprehensive knowledge of the subject matter led to plagiarism, and the requirement not to offend different pressure groups led to the omission of controversial issues. Bragdon concluded that writing a textbook involved a requirement to make compromises in the interest of commercial success.

Presenting an editor's perspective, Broudy (1975) argued that the process of developing and publishing textbooks involved interaction between the author, publisher, editorial staff, sales staff, teachers and parents in reaching compromises on various demands. The author was usually selected by the publisher, and often worked as a member of a committee in developing a

material. Sometimes publishers paid a higher royalty to a lead author with a reputation in the field for providing credibility, but who contributed little in actual work to the total enterprise. Editors, however, were major contributors to the developmental process, although not often credited as such by the publishing industry. The relationship between editorial and sales departments in many publishing companies was often antagonistic, which inhibited feedback from schools about products being made available to editors. Sales staff usually dealt with administrators and selection committee members rather than teachers, and their judgments about the suitability of products for classroom use were often inaccurate. Publishers generally coordinated the development of textbooks to the cycles of state-level adoption states, especially Texas and California, as success in these states was likely to pay for the developmental costs. This situation created a vicious circle in which market resistance to innovation led publishers to produce conservative and uncontroversial textbooks. The high cost of publishing textbooks and the low profit margin also militated against publishers promoting innovation. Broudy concluded that publishers should show greater accountability for their products by testing them during the developmental phase, and promoting change that recognised students as the essential group within the marketplace.

Talmage (1986) asserted that publishers played a less important role during the curriculum reform movement in the 1960s and early 1970s. At this time, teachers failed to accomplish the role of developing their own materials, because of lack of time, expertise and funds. Whilst scholars developed materials, they failed to engage students, because the concepts and language usage were too sophisticated. However, these groups play different roles in the publishing process. Scholars engage in research and extend knowledge, whilst teachers reshape materials to fit students' needs. A third group, the interpreters or textbook authors, synthesise the contradictory theories of scholars, select the content most suited to a particular audience, arrange the findings in an appropriate form, and present the content clearly and in an interesting form. The activity of publishing materials involves bringing together the roles of scholars, interpreters, and teachers. Two-way relationships exist between publishers identifying teachers' needs and teachers identifying the available materials, and between publishers seeking out interpreters to develop materials and interpreters informing publishers about their ideas. The relationship between interpreters and teachers is generally one-way, although both groups may collaborate in developing materials. Whilst both interpreters and teachers look to scholars for current findings in a particular discipline, the former group draws more heavily on scholars' work. The publisher's role is especially important in finding out teachers' needs for materials, and weighing up conflicting demands of interest groups in providing the best materials.

The report issued by the National Society for the Study of Education in 1990 included five studies on developmental changes or growth occurring in the textbook publishing industry in the 1980s. Presenting an analysis of the key factors transforming the materials' marketplace in the 1980s, Westbury (1990) argued that the textbook publishing industry acquired a de facto role as a national curriculum authority, because of the failure of the states to define a common curriculum. Whilst an attempt was made by governmental agencies to define a new curriculum through projects initiated during the

curriculum reform movement in the 1960s and early 1970s, their products failed to be taken up by school systems. Since that time, the textbook publishing industry became dominated by a small number of major companies, because of the high investment involved in developing, manufacturing and distributing textbooks. Although the textbook publishing industry may not have performed well in the task of leadership and control over the curriculum and production of high quality materials, Westbury concluded that a better result could not have been expected. Constraints upon its operations, the interdependence of its relationship with a diffusely organised school system, and the failure of critics of poor quality in textbooks to institutionalise their values compromised its performance.

By analysing current financial characteristics of large publishing companies, Squire and Morgan (1990) found that increasing operating costs and declining profits have meant they are now dominating the textbook publishing industry, and aiming their products at a national market. They identified that the process used by large publishing companies to develop textbook programs was dependent on preparing a rationale in advance or a detailed specification of the philosophy for the design and key features of a textbook. Often, market research was undertaken, and portions of the text were piloted. Authors worked with experienced editors in evaluating this research, and marketing personnel studied textbook programs, as they were developed to interpret likely acceptance by teachers. Following publication, publishers were responsible for training sales and consultant personnel, developing promotional materials, providing professional development for teachers, and planning new editions. Publishers needed to take into account the prevailing patterns of decision-making involved in selection, when marketing their products. Squire and Morgan suggested that the process for developing textbooks might be improved by requiring authors to accept greater responsibility for quality, involving publishers earlier in school improvement projects, and recommending that publishers reconsider the soundness of sales strategies involving free materials. Teachers should be trained to evaluate and select materials, and school funding should be increased to allow greater flexibility for purchasing materials.

Reporting on the publishing process used by large textbook publishing companies through a case study, Young (1990) described the three-phase process employed by Holt, Rinehart and Winston to develop a new edition of a best selling biology textbook, *Modern Biology*. The pre-production phase involved surveying market needs and competitive products. The developmental phase involved a production team of authors, subject specialists, consultants, content and copy editors, a photo researcher, an art director, a production manager and sales personnel, overseen by a senior editor, developing the textbook and ancillaries in response to feedback from the education community and special interest groups. The post-production phase involved monitoring the response to the marketing of the textbook and ancillaries for sales' results and feedback about potential changes, and sales personnel developing promotional materials and providing training in the use of the product.

Two commentators examined the role of small companies as niche publishers. By considering the constraints faced by small publishing companies involved in publishing basal textbooks for the elementary level in reading, language arts, mathematics, science, and social studies, Carus

(1990) identified that they took advantage of opportunities not met by large textbook publishing companies. The most important opportunities were taking advantage of the effects of the education reform movement, and the ineffective bureaucracy or management changes in large publishing companies resulting from takeovers. On the other hand, small publishing companies faced difficulties in affording sufficient sales staff to cover the market, applying computer technology, responding to changing attitudes resulting from the impact of various minority groups, and applying resources to current educational research in order to improve their products.

Hawke and Davis (1990) defined the role of small publishers as catering for five main niche markets: materials focused on current topics or new content; materials based on innovative pedagogy; materials aimed at specific populations; materials with innovative formats; and materials aimed at local or regional markets. Hawke and Davis described a hypothetical case history of a typical niche publishing company. Having usually been employed previously in education or publishing, niche publishers were motivated by both profit making and a commitment to improving education, but rarely had experience in all aspects of the textbook publishing industry. Often small publishing companies were profitable initially, whilst the entrepreneur did most of the work, but expansion needed to compete in the marketplace led to niche publishers taking financial risks. Sometimes, a larger competitor adapted a niche publisher's product, which led to a takeover, but bankruptcy was a more common outcome. Hawke and Davis recommended that publishers in small companies should recognise that they only have a three- to five-year opportunity for profit making, their costs require rigorous control, and slick packaging, free samples, piloting products in schools, and discounting products should be avoided.

Chall and Squire (1991) examined the application of the publishing process to develop reading materials. A review of the historical development of reading materials showed that they played a central role in the evolution of the textbook publishing industry through the production of the first readers in the eighteenth and nineteenth centuries followed by the publication of the first basal reading programs in the 1920s. As well as the roles played by publishers, authors and consultants in developing reading materials, academics, research and development laboratories, test developers, commercial developers and teachers contribute to the publishing process. A basal reading program, which could consist of as many as 200 components, is likely to be developed over several years at a cost ranging from \$15 million to \$35 million, but yield a profit only in the order of 10 percent. Research focused on basal reading programs has identified the need to include children's literature in the content, match the level of difficulty to readers, include appropriate illustrations, enhance instructional design and improve the quality of teachers' guides. Research showing a decline in the difficulty of textbooks, inconsistencies between selection procedures and the impact of pressure groups has important implications affecting the process for publishing reading materials.

Three commentators examined the transformation of the textbook publishing industry through mergers and takeovers. Rudman (1990) argued that corporate mergers within the textbook publishing industry affected the international dimensions of publishing, the costs and gains of restructuring in terms of financial and human resources, and the relationship between

textbook and test products. Although the effects of takeovers by foreign and domestic competitors were similar, the advantages and disadvantages of takeovers were difficult to assess. Whilst mergers led to restructuring into more efficient and competitive companies, the greater concentration of financial resources may lead to a less competitive business environment. The restructures caused by mergers also had profound effects on the lives of employees. Dismissed as a consequence of mergers, many former employees became involved with small publishing companies, whilst employees, who were retained, often lost their commitment to company loyalty. Corporate mergers also contributed to a move away from contracted authorship to in-house production of textbooks and tests by editorial teams, which may have compromised accountability and thereby affected the quality of the products. Rudman argued that the public should challenge the motivations put forward for corporate mergers, which have produced greater centralisation in the textbook publishing industry, tighter control through in-house production, and disrupted the lives of long-term employees.

Sewall and Cannon (1991) reported that macro-economic globalisation during the 1980s affected the textbook publishing industry as independent publishers were acquired by large, multinational media, communications and entertainment conglomerates. The number was reduced to five large publishing houses: Macmillan; Harcourt Brace Jovanovich; Silver Burdett and Ginn; Houghton Mifflin; and Scott, Foresman. Whilst these publishing companies dominated the national market, a few, middle-sized, regional publishing companies established pre-eminence in particular subject areas, but small publishing companies were usually restricted to publishing supplementary materials. The restriction of the marketplace to fewer competitors was also matched by the increasing cost of producing a national textbook program across the elementary grades, estimated to be as high as \$40 million. Whilst this outlay may realise margins of 10 to 20 percent, it was likely to take many years to recover. Sewall and Cannon concluded that as conglomerates gained control of the textbook publishing industry, barriers to market entry and survival posed by increasing production and marketing costs, did not portend well for improving the quality of products. This effect, however, was likely to be reversed by political leaders, educators and parents calling for education reforms, including raising curricular quality through textbook improvement.

Sewall (2005) argued that the increasing concentration over the last 15 years, since Squire and Morgan wrote their article, of the textbook publishing industry in the hands of four large companies has reduced the quality of textbooks. Many independent publishing companies have been absorbed as brand names within the four large companies: Pearson; McGraw Hill; Reed Elsevier; and Houghton Mifflin. Pearson, McGraw Hill and Reed Elsevier have strong global ambitions with interests in other areas, such as the publication of journals and the book trade. A consortium of private equity groups bought Houghton Mifflin in December 2002. Formidable barriers to entry into educational publishing, provided at every stage of production and marketing, favour large publishing companies. Large publishing companies apply several strategies to control the relatively small number of volume buyers. They use the School Division of the Association of American Publishers to lobby state selection committees in large adoption states to obtain lucrative markets. They acknowledge the requirements of state standards of large adoption states in the content of textbooks. They attempt

to satisfy the preferences of pressure groups, thereby homogenising the content of textbooks. They have replaced the use of authors by a writing-for-hire production system to reduce costs. Since large publishing companies are responding to these pressures, they are no longer involved in deciding the content of textbooks. Sewall concluded that trends have moved in opposite directions, except for increased state funding, from the recommendations presented by Squire and Morgan. Sewall believed this situation could be remedied by teachers turning to college-level textbooks, or by publishers bringing older textbooks back into print with suitable revisions.

Conclusion

The examination of research literature has identified that the main facets of the textbook publishing industry in the USA arose in the early nineteenth century. Since that time, specific roles for authors, editors and sales people have emerged in the publishing process, and new technologies in printing and new media in products have modified the publishing process. More recently, corporate takeovers and mergers in the textbook publishing industry have created particular places for large companies and newly emerging small companies in the market; the former have appropriated the function of national publishers, whilst the latter operate as niche publishers.

The results of several surveys conducted in association with the report issued by the National Society for the Study of Education in 1931 suggested that procedures for selecting authors, their role, and the methods they applied were well defined by the early 1930s. Commentators reporting on textbook publishing in the 1950s and 1960s depicted an industry in which the publishing process and the roles of authors, editors and sales people had been institutionalised for many years. On the other hand, the textbook publishing industry of that time was faced by the challenges of integrating new technologies in printing and new media for presenting materials. Commentators writing in the 1960s and 1970s provided detailed accounts of the publishing process, and how large adoption states and interest groups influenced publishers in the selection of content in textbooks. Commentators writing in the 1990s, however, were more concerned to analyse changes in the textbook publishing industry occurring in response to globalisation. Mergers and takeovers, resulting from reductions in profit margins faced by many textbook publishing companies, led to the incorporation of publishing activities within multinational media, communications and entertainment conglomerates, whilst new emerging publishers filled a vacuum in the marketplace as niche publishers. The more competitive financial environment of the 1990s concentrated the publishing of most textbooks in the hands of a few large publishing houses, whilst small niche publishers struggled to survive precariously at the margins of the marketplace. As yet, contemporary commentators have paid little, if any, attention to how the growing use of the Internet as a provider of learning resources has affected the textbook publishing industry. Within the bounds of this research, the marketplace portrayed by commentators today presents a substantially different environment in the world of textbook publishing than depicted by writers in the 1950s.

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