



THE NOODLE MARKETS REPORT

Powered by SmartProcure
November 2016 – K-3 Math Curriculum

A recurring dive into K-12 purchasing data, exploring curriculum impacts and trends.

THIS EDITION'S RUN-DOWN:

For this edition, Noodle Markets and SmartProcure set out to study the landscape of **K-3 math curriculum products** and their **impacts on student achievement**. We know that, historically, socioeconomic status correlates with student achievement, but how does curriculum fit into this picture? To dive in, we analyzed thousands of lines of **purchase orders, assessment data**, and district **demographic info**.

Our findings suggest that K-3 math curriculum purchasers should **consider product impacts on achievement, across the socioeconomic spectrum**.

MOST-USED PRODUCTS:

Purchase data tells us there is ebb and flow in product market share. Relative cost is not always a factor. **Three companies account for 85% of market share in our data: Houghton Mifflin Harcourt, Pearson, and McGraw-Hill.**

20 Frequently-used K-3 Math Products - Relative Cost, Market Share over Time

Table 1: Relative Cost and Market Share of K-3 Math Textbook Products, 2008-2015 Combined

Publisher	Product	Relative Cost	Market Share	Trend	Top Spending Districts
Math Learning Center	Bridges	\$\$	👤	↑	Valparaiso Community Schools (IN), Snohomish School District (WA), Littleton Public Schools (CO)
Houghton Mifflin Harcourt	Do the Math	\$	👤	↓	Osceola County School District (FL), Rapid City Area School District (SD), Chicago Public Schools (IL)
Marshall Cavendish	Earlybird, Singapore	\$	👤	↓	South River Public Schools (NJ), Orchard Farm School District (MO), Poughkeepsie City School District (NY)
Pearson	Envision Math	\$\$	👤👤👤	↑	Vancouver School District (WA), Hernando County Schools (FL), Shoreline School District (WA)
Great Minds	Eureka Math	\$\$	👤	↓	Upper Dublin School District (PA), Cucamonga School District (CA), Elmira City School District (NY)
McGraw-Hill	Everyday Math	\$	👤👤	↑	Hamilton County Department of Education (TN), Lakeside Union School District (CA), Chicago Public Schools (IL)
Houghton Mifflin Harcourt	GO Math	\$\$	👤👤👤	↑	Hillsborough County Public School Board (FL), Metropolitan Nashville Public Schools (TN), Osceola County School District (FL)
McGraw-Hill	Growing with Mathematics	\$\$\$	👤	↓	Evergreen School District No. 114 (WA), Puyallup School District (WA), Washougal School District (WA)
Houghton Mifflin Harcourt	Harcourt Math	\$\$	👤👤👤	↓	Long Beach Unified School District (CA), Downey Unified School District (CA), Broward County Public Schools (FL)
Houghton Mifflin Harcourt	Houghton Mifflin Math	\$	👤	—	Edmonds School District (WA), Ontario-Montclair School District (CA), Ballard Community School District (IA)
McGraw-Hill	Math Concepts	\$	👤👤	↓	Elk Grove Unified School District (CA), San Bernardino City Unified School District (CA), Bellevue School District (WA)
McGraw-Hill	Math Connects	\$\$	👤👤	↑	Clover Park School District (WA), Yelm School District (WA), Central Kitsap School District (WA)
Houghton Mifflin Harcourt	Math Expressions Common Core	\$\$\$	👤👤👤	↑	Downey Unified School District (CA), Alhambra Unified School District (CA), Enumclaw School District (WA)
Marshall Cavendish	Math in Focus, Singapore	\$\$	👤👤	↑	Highline Public Schools (WA), Newark Public Schools (NJ), Longview Public Schools (WA)
Kendall Hunt	Math Trailblazers	\$\$	👤	↓	Chicago Public Schools (IL), Teaneck Public Schools (NJ), Battle Ground School District (WA)
McGraw-Hill	Math Triumphs	\$	👤	—	Baker County School Board (FL), Quakertown Community School District (PA), Bridgeport School District (WA)
McGraw-Hill	My Math	\$\$\$	👤👤	↑	Dallastown Area School District (PA), Greater Clark County Schools (IN), Monroe Township School District (NJ)
Curriculum Associates	Ready Mathematics	\$	👤👤	↑	Hernando County Schools (FL), Anne Arundel County Public Schools (MD), Forsyth County Schools (GA)
Houghton Mifflin Harcourt	Saxon Math	\$\$\$	👤	—	Union-North United School Corporation (IN), Ringgold School District (PA), North Franklin School District (WA)
Evan-Moor	Take it to Your Seat	\$	👤	—	Osceola County School District (FL), Erlanger-Elsmere Schools (KY), Vineland Public Schools (NJ)

PRODUCTS USED BY HIGH-ACHIEVING DISTRICTS:

Looking at the top-scoring districts within each socioeconomic group, the following products hold the highest market share. Only one appears across all income levels. Some products may additionally be represented in low-achieving and middle-achieving districts with frequency.

High-Achieving Districts - Variation in Product Usage Across Median Household Incomes

	Low-Income \$18,000 to \$50,000	Middle Income \$50,001 to \$70,000	High Income \$70,001 to \$222,000
Most Purchased Products	Math Expressions Common Core; GO Math; Harcourt Math; Math in Focus, Singapore; Bridges	Envision Math; Math Expressions Common Core; GO Math; Growing with Mathematics; Math Triumphs	My Math; Ready Mathematics; Envision Math; Math Expressions Common Core; Harcourt Math

MOST PROMISING WITHIN INCOME LEVELS:

After controlling for the effect income may have on achievement, the following products are top performers. Within each income band, the top products vary considerably. **Note that these correlations do not necessarily imply causation.** The reason to look at this data is not to guarantee higher test scores based solely on product adoption; it should be useful, however, to see what high performing districts are doing.

Products with Highest Impacts - By District Income Level

	Low	Middle	High
1	Growing with Mathematics	Growing with Mathematics	Do the Math
2	Bridges	Bridges	Take it to Your Seat
3	Everyday Math	Math Expressions Common Core	Math Expressions Common Core
4	Math Connects	Everyday Math	Growing with Mathematics
5	Math Triumphs	Math Connects	Bridges

CLOSING:



While this research cannot conclude direct causal relationships between products and student achievement for purchasing leaders, **it's worth looking at what products might best serve a particular student population, especially considering socioeconomic status.** Stay tuned for more K-12 market insights.