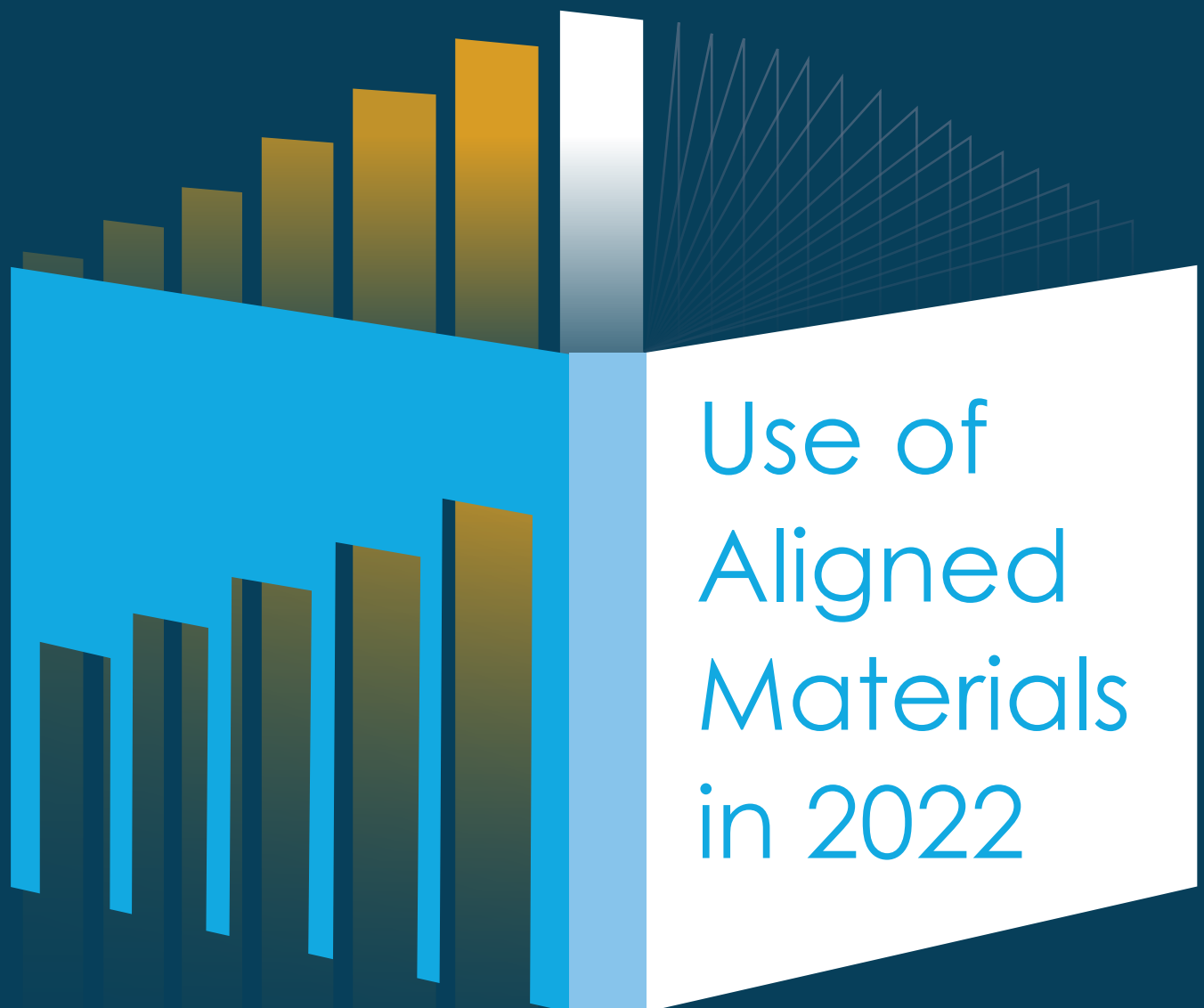


State of the Instructional Materials Market



INTRODUCTION

In the 2021–22 school year, school districts leveraged federal Elementary and Secondary School Relief (ESSER) funds to invest an estimated [\\$18.9 billion](#) on instructional materials to support accelerating student learning. Recently ESSER funds set to expire in September 2024 were extended to March 2026, marking an ongoing opportunity for school districts to make investments in curriculum as a long term strategy for sustainable change.

Through our work at EdReports, we know that instructional materials make a difference for students and have a direct impact on learning outcomes. Research tells us that students learn primarily through their interactions with teachers and content. The materials used in classrooms matter for ensuring all kids are college and career-ready, equipped with the knowledge and skills they need to succeed in school and life.

Because of the [critical role materials play](#) in accelerating student learning, it is important for a variety of stakeholders—from those working in the classroom to those setting district policy—to have a better understanding of the instructional materials market and how it is growing and changing. This knowledge, as well as the components that can contribute to the use of quality materials in the classroom, can help decision-makers adopt and implement the strongest curriculum for their local context.

This analysis explores the use of high-quality instructional materials in 2022 and some of the potential factors that contribute to their use. The report draws upon data from EdReports reviews, copyright dates, ESSER spending reports, and data from the RAND Corporation American Instructional Resources Survey (AIRS) on curriculum use, teacher perception, and school context.

THE USE OF ALIGNED MATERIALS IS ON THE RISE

Through the COVID-19 pandemic, the use of aligned instructional materials was consistent between 2020 and 2021. But in 2022, 36% of teachers were using at least one aligned ELA curriculum once a week or more, on average, an increase of 10 percentage points over 2020 and 2021, and 48% of teachers were using at least one aligned mathematics curriculum regularly, which was an 8 percentage point increase from 2021.

The use of aligned ELA materials has more than doubled since 2019. Figure 1 showcases the changes in use of aligned materials from 2019 to 2022. While there may be additional factors at play that contributed to this increase, it is clear that districts prioritized high-quality instructional materials as [part of their post-pandemic acceleration efforts](#). By exploring changes that could have contributed to this growth, hopefully more can be done to advocate for the conditions that increase the use of aligned materials as we strive for access for all students.

What are “aligned” materials?

For the purpose of this report, “aligned” refers to core comprehensive ELA, math, and science instructional materials that meet expectations for EdReports’ review criteria which aligns to college and career-ready standards and other dimensions of quality, such as supports for diverse learners. [Learn more >](#)

Figure 1. Use of standards-aligned materials, 2019–2022

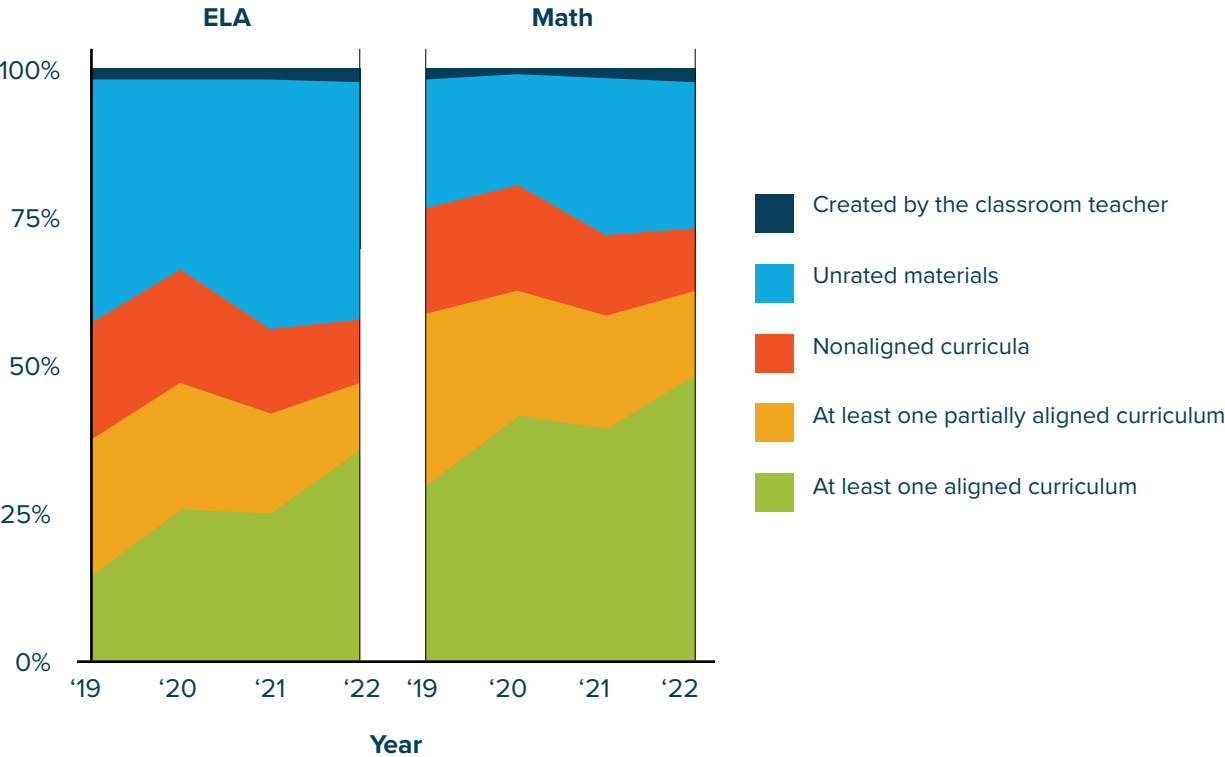


Table 1: Use of standards-aligned materials, 2019–2022

	ELA				Math			
	2019	2020	2021	2022	2019	2020	2021	2022
At least one aligned curriculum	15%	26%	26%	36%	30%	42%	40%	48%
At least one partially aligned curriculum	23%	22%	17%	11%	29%	21%	20%	16%
Nonaligned curricula	20%	19%	14%	10%	18%	17%	13%	9%
Unrated materials	41%	33%	43%	41%	22%	19%	27%	26%
Created by the classroom teacher	1%	1%	1%	2%	1%	0%	0%	1%

Note: See [Figure A1](#) and [Figure A2](#) for breakdown of types of materials comprising the category of unrated materials.

Potential Factors Contributing to the Increase in Use of Aligned Materials

The increase in the use of aligned materials may be attributed to a combination of different factors. These include the growing availability of aligned programs, the demand from teachers for resources to support their instruction, and the influx of federal funding to target challenges stemming from the COVID-19 pandemic.

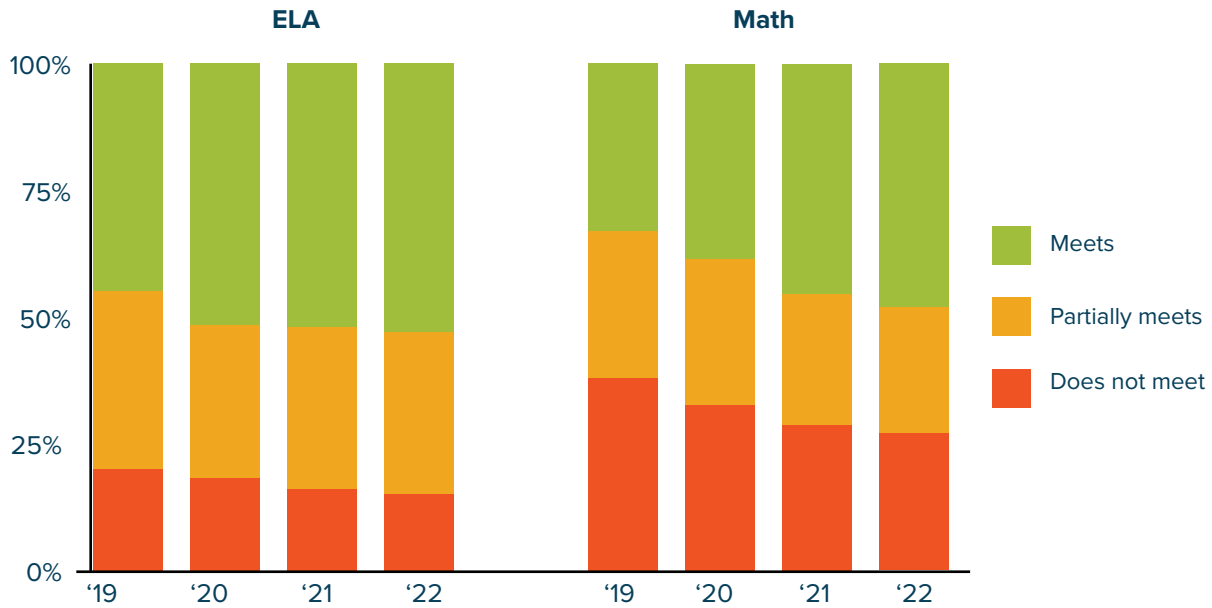
1. The availability of instructional materials aligned to standards continues to increase. EdReports has reviewed approximately **97%** of the known comprehensive K–12 mathematics and English language arts materials market.¹ EdReports continues to gain a better picture of the science materials market, having reviewed 41% of known comprehensive K-12 science materials. Science is a nascent marketplace for high-quality materials and EdReports is eager to catch up to ELA and mathematics in terms of percent reviewed.

- Of the mathematics materials EdReports has reviewed, **48%** meet expectations for alignment, **25%** partially meet expectations for alignment, and **27%** do not meet expectations for alignment.
- Of the English language arts materials EdReports has reviewed, **53%** meet expectations for alignment, **32%** partially meet expectations for alignment, and **15%** do not meet expectations for alignment.
- Of the K–12 science materials EdReports has reviewed, **17%** meet expectations for alignment, **14%** partially meet expectations for alignment, and **69%** do not meet expectations for alignment.

Figure 2 below showcases the incremental growth in availability of aligned materials since 2019. Each bar represents the reviewed curriculum for that edition-year or earlier, whereby we see the cumulative increase in percentage of aligned materials as newer editions of materials are added. In just three years, the availability of standards-aligned ELA materials has grown by 8% and mathematics materials has increased by 15%. The [demand for high-quality materials](#) has grown significantly in the last few years requiring publishers to align newer materials to standards.

¹ EdReports defines the “known market” as ELA foundational skills programs and comprehensive, yearlong ELA and math programs in circulation for which we have data. This excludes materials that are created directly by teachers or the school or district in which they work, supplemental materials that do not comprise a comprehensive yearlong scope and sequence, and pre-2012 edition or curricula no longer being actively sold by publishers.

Figure 2. Availability of standards-aligned materials, 2019–2022

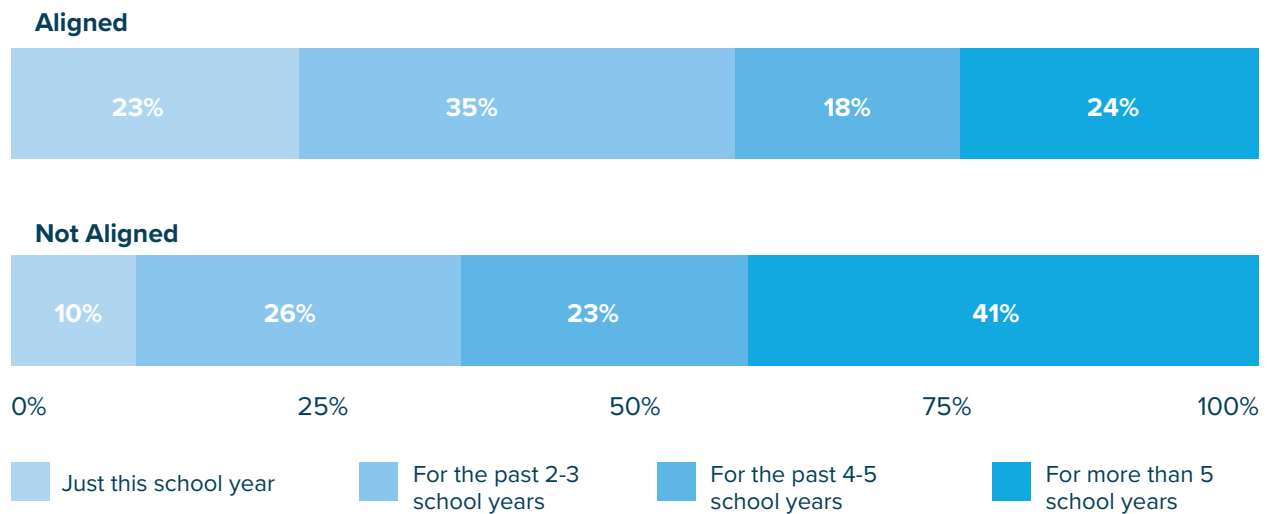


Note. Based on EdReports published reports on core programs, 2022 edition or earlier. See Table 2 for summary statistics on all published reports by grade band

Table 2: Summary statistics for EdReports grade-level reports by alignment rating, 2022 edition and earlier

	Meets		Partially meets		Does not meet		Total	
	n	%	n	%	n	%	n	%
ELA & Math K–12	463	49%	269	28%	216	23%	948	100%
ELA Core K–12	181	53%	107	32%	52	15%	340	100%
ELA Core K–5	72	42%	63	37%	36	21%	171	100%
ELA Core 6–8	61	62%	29	29%	9	9%	99	100%
ELA Core 9–12	48	69%	15	21%	7	10%	70	100%
ELA Foundational Skills	6	17%	21	58%	9	25%	36	100%
Math K–12	276	48%	141	25%	155	27%	572	100%
Math K–5	117	45%	70	27%	71	28%	258	100%
Math 6–8	81	51%	37	23%	42	26%	160	100%
Math 9–12	78	51%	34	22%	42	27%	154	100%
Science K–12	12	17%	10	14%	50	69%	72	100%
Science K–5	5	28%	1	6%	12	67%	18	100%
Science 6–8	6	12%	9	18%	36	71%	51	100%
Science 9–12	1	33%	0	0%	2	67%	3	100%

Figure 3. Number of years teachers have been using their curriculum when their curriculum is aligned vs. not aligned to EdReports criteria



2. Educators are turning to aligned curriculum because the materials better meet their instructional needs. Teachers recognize and data supports that access to high-quality aligned instructional materials makes a difference in the instruction students receive. Teachers using aligned materials [engaged students in mathematical practices at a significantly higher rate](#) than teachers who were not using an aligned curriculum.

Recent data show teachers spend more of their time using a single curriculum when it is aligned to high-quality criteria. Of teachers using aligned ELA and math materials, 51% report using it for at least half of their instructional time, compared to teachers not using aligned materials, 44% report using it for at least half of their instructional time. Teachers also report they are less likely to modify their curriculum when using aligned core curriculum than teachers who are not using aligned materials.

Figure 4. Instructional time using a single curriculum when aligned vs. not aligned, for ELA and math combined

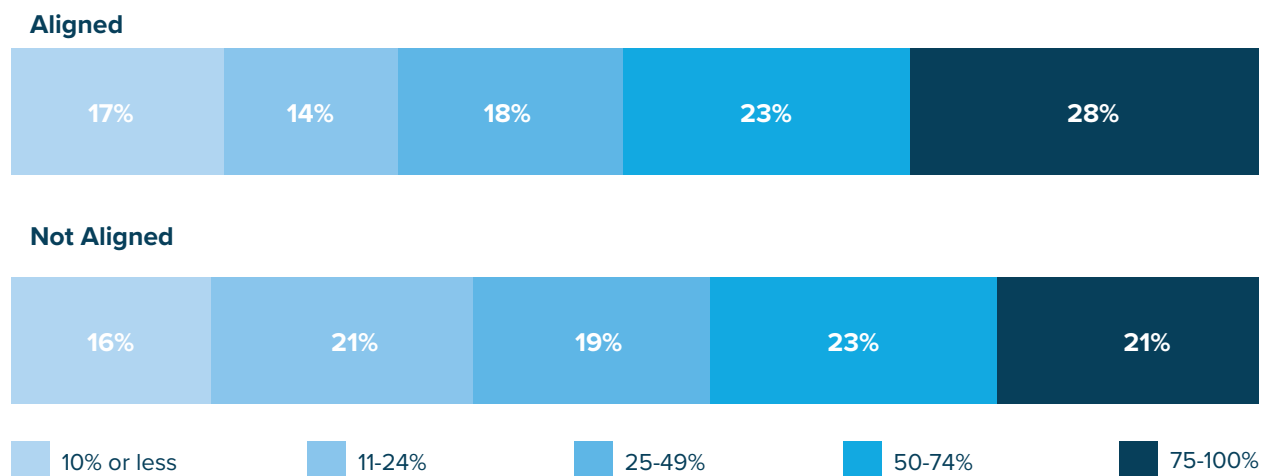
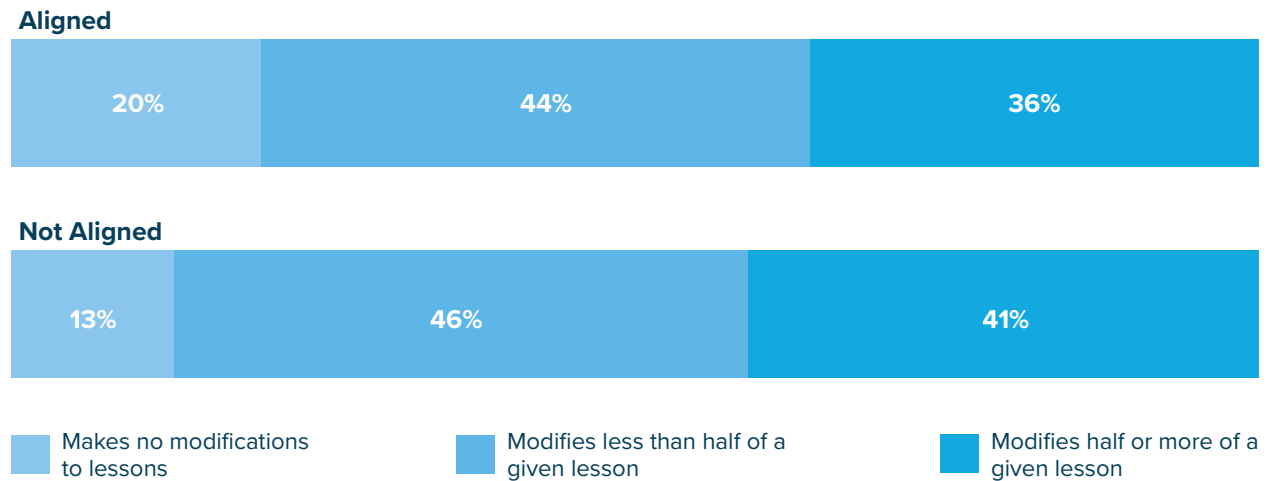


Figure 5. Typical modification when the curriculum is aligned vs. not aligned, in ELA and math combined



When students are given access to grade-level content and more grade-appropriate assignments, in addition to stronger instruction, deeper engagement, and higher expectations, the gap between students performing below grade level and their higher achieving peers begins to narrow.

3. The COVID-19 pandemic also brought education an influx of funding with relief dollars leading some states and districts to use their funding for the purchase of high quality materials. Through the Elementary and Secondary School Emergency Relief Fund (ESSER), the U.S. Department of Education awarded grants to state education agencies (SEAs) for the purpose of providing local education agencies (LEAs) with emergency relief funds to address the impact of COVID-19. Through three different installments, ESSER I, ESSER II, and ESSER III, a total of almost \$190 billion in funds were provided for states and districts. Table 4 showcases the current spending for each of the ESSER relief packages. Given that 58% of teachers using aligned materials indicated they began using them within the last three years, it's likely that with access to these unprecedented funds, states and districts made purchasing decisions that supported the increase in use of aligned programs.

Table 4. ESSER Spending as of August 31, 2023

Date Enacted	Legislation – Relief Package	K–12 (ESSER)	% of ESSER Funds Spent*
03-27-2020	ESSER I – Coronavirus Aid, Relief & Economic Security Act (CARES Act)	\$13.2 billion	99% spent
12-27-2020	ESSER II – Consolidated Appropriations Act of 2020	\$54.3 billion	87% spent
03-10-2021	ESSER III – American Rescue Plan (ARP)	\$121.9 billion	47.2% spent
Totals		\$189.4 billion	62.2% total spent

Over the span of two years, the use of aligned ELA curriculum increased by 10 points (from 26% to 36%), while use of aligned mathematics curriculum rose from 40% to 48%. This rise is encouraging, and while it is hard to know which of these factors that contributed to this positive growth, more choices, more support and more resources all play some role.

CALLS TO ACTION

Instructional materials matter for students, teachers, and communities. Teachers depend on materials to meet the needs of their students and accelerate learning opportunities, and it is crucial that we listen to them to ensure they have the resources and training necessary to succeed in the classroom. While 2022 witnessed an increase in the use of aligned materials, the data indicate there is still room for improvement. While 36% of teachers are using at least one aligned ELA curriculum and 48% of teachers are using at least one aligned mathematics curriculum, that is not good enough to ensure all students become college and career ready.

1. Invest in high-quality, aligned instructional materials that support diverse learners.

The [Education Stabilization Funds Transparency Portal](#) shows just under \$72 billion remains in unspent ESSER funds. With only 62.2% of funds spent, states and districts have access to unprecedented resources that could be used to invest in aligned materials and the supports needed for strong implementation. Investing in high-quality curriculum is the starting point for ensuring all students have access to engaging, grade-level content.

During the selection process, states and districts should [assess their local needs](#) and [select materials](#) that are standards-aligned and support their local priorities. School systems can [signal quality](#) by selecting materials that ensure strong support for all students, including [multilingual learners](#), and materials engage students through [culturally responsive content](#).

2. Have a plan and resources for implementation.

The work doesn't end once a curriculum is selected and purchased. A [strong implementation plan](#) is crucial in providing educators with the resources and support they need to be successful.

Essential to strong implementation is [curriculum-aligned professional learning](#), which is a critical lever to ensure that materials are used well in classrooms. Professional learning supports educators in understanding how to implement the materials with integrity and can potentially prevent the need to hunt down materials online or make modifications to their lessons. [Investing in ongoing professional learning is as valuable](#) for teachers who are learning a new curriculum as it is for teachers who have been using a set of materials for many years. [Ensuring instructional leaders](#), such as principals and coaches, are also engaged in professional learning supports the development of systems that lead to strong implementation.

Planning ahead, empowering educators, engaging stakeholders, and connecting strong professional learning throughout the implementation process can be the difference between materials sitting on a shelf or becoming a high-leverage resource educators have to improve student learning.

3. Meaningfully include teacher voice in the adoption and planning process.

Teachers' role in the selection of instructional materials matters, particularly when it comes to future use of the adopted programs. Teachers are intimately familiar with students' needs and use curriculum every day in their daily instructional practices. Teachers have a clear vision of how materials should support student learning. This includes the understanding that materials should [include support for diverse learners](#) with rich content that [is culturally and linguistically responsive](#).

A key to increasing engagement with materials is to ensure teachers have a clear and meaningful role in the selection and adoption process. Bringing educators to the table to support the selection of new curricula and planning for implementation builds buy-in and can result in increased use of high-quality materials.

Listening to the diverse perspectives and expertise of educators, providing ways for them to give input, prioritizing their needs, and developing a process where they get to be decision makers is key to ensuring materials are used effectively.

Our next story in the State of the Materials Market 2022 series will share data around what teachers are saying about their use of materials and the support they need for implementation. The analysis will detail the collaboration needed between schools and districts to support teachers with using aligned materials.

METHODOLOGY

Analyses of materials available drew upon information on the [EdReports website](#). Data for curricula series reviewed by EdReports were based on all reports published between February 11, 2015 and June 2, 2023, for 2022 copyright edition or older materials. Each high school math and middle grades science report is counted as three reports, corresponding with a traditional or integrated three-course sequence. All other reports are counted as one report each, corresponding with the specific grade-level of the report.

Analyses of materials used drew upon microlevel data from the RAND Corporation American Instructional Resources Survey (AIRS) for years 2019, 2020, 2021, and 2022, completed by the American Teacher Panel in the spring of each year.² Technical documentation is available for the [AIRS 2019](#), [AIRS 2020](#), [AIRS 2021](#), and [AIRS 2022](#). All analyses on AIRS microlevel data used the RAND sampling weights to produce estimates that reflect the national population of public school teachers in the United States.

For Table 1 and Figures 1, A1, and A2, estimates are based on responses to two survey questions, then filtered through EdReports rating data. The survey questions are: “Among the [subject] curriculum materials in this list, select any materials you use regularly (once a week or more, on average) for your [subject] instruction this school year”; and “Indicate which additional instructional materials—beyond curriculum materials—you use regularly (once a week or more, on average) for your [subject] instruction this school year”

The method for calculating the percentage of teachers that use standards-aligned materials based estimates on the highest-rated curriculum teachers reported to use regularly. The categories of materials reported (at least one aligned curriculum, at least one partially aligned curriculum, nonaligned curricula, unrated materials, created by the classroom teacher) are rank ordered, whereby teachers were designated into a lower category only if they did not report using materials at a higher-order category. Similarly, the sub-categories of unrated materials reported in Figures 2 and 3 are rank ordered by Comprehensive curriculum not reviewed, Pre-2012 ed. or no longer actively sold by publisher, Supplemental program, other curriculum not listed or unknown, created by school or district, and no particular curriculum. Thus, teachers designated as using a supplemental program do not report using any comprehensive curriculum, but may also use other curriculum not listed or unknown, school or district created, or created by the classroom teacher.

ESSER spending data retrieved from the U.S. Department of Education, [Education Stabilization Fund portal](#).

² RAND American Educator Panels, American Teacher Panel, “American Instructional Resources Survey.” RAND2019_05may_AIR0519T, RAND Corporation, Santa Monica, CA, May 5, 2019.

RAND American Educator Panels, American Teacher Panel, “American Instructional Resources Survey.” RAND2020_05MAY_AIR0520T, RAND Corporation, Santa Monica, CA, May 5, 2020.

RAND American Educator Panels, American Teacher Panel, “American Instructional Resources Survey.” RAND2021_05MAY_AIR0521T, RAND Corporation, Santa Monica, CA, May 5, 2021.

RAND American Educator Panels, American Teacher Panel, “American Instructional Resources Survey.” RAND2022_04APR_AIR0422T, RAND Corporation, Santa Monica, CA, April 4, 2022

APPENDIX

Figure A1. Types of materials comprising the category of unrated ELA materials

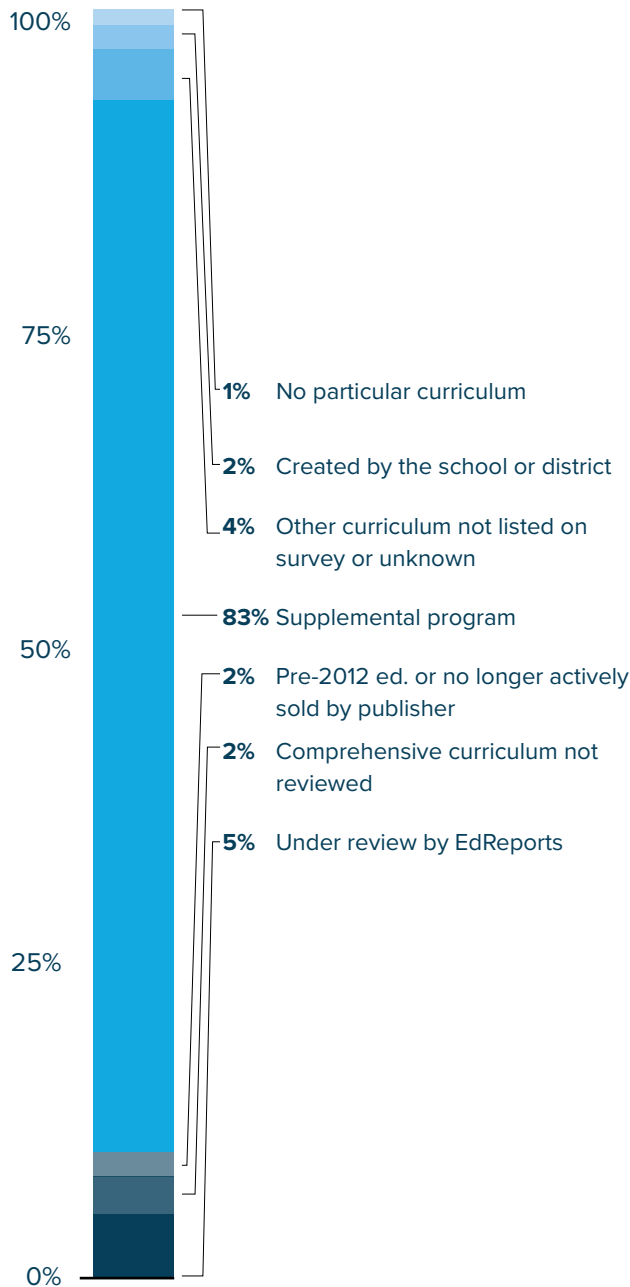
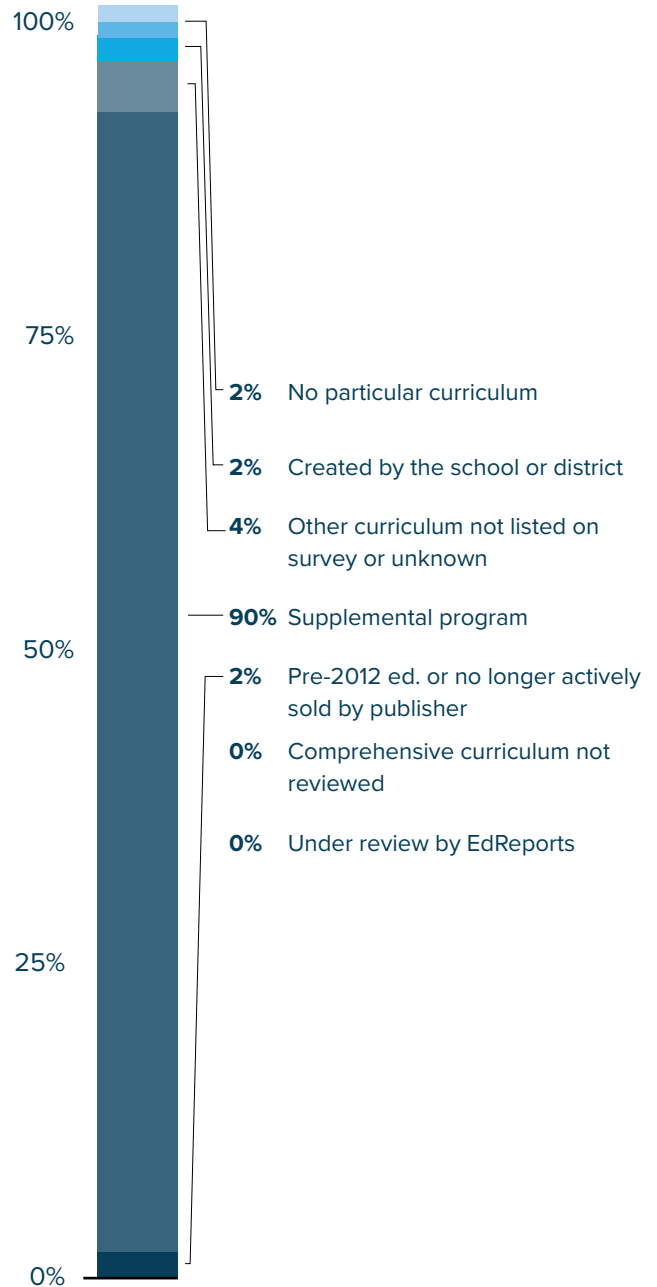


Figure A2. Types of materials comprising the category of unrated Math materials



ABOUT EDREPORTS.ORG

EdReports.org is an independent nonprofit designed to improve K–12 education. EdReports.org increases the capacity of teachers, administrators, and leaders to seek, identify, and demand the highest-quality instructional materials. Drawing upon expert educators, our reviews of instructional materials and support of smart adoption processes equip teachers with excellent materials nationwide. EdReports and associated marks and logos are the trademark property of EdReports.org, Inc.

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