

Closing the Quality Gap: Improving the Pre-K Curriculum Market

Driving Excellence for All in Early Learning: An Executive Summary of the Early Learning Ecosystem



Market Snapshot: A Large and Growing Sector with Limited Competition

- **Scale and growth potential:** The pre-K curriculum market is estimated at a total of ~\$750–\$900M annually, anchored by a \$411M pre-K reading materials market baseline. When adding assessment and PD, the full pre-K instructional materials market is estimated at ~\$1.0–\$1.26B annually, with realistic growth scenarios projecting closer to ~\$1.5B by 2027.
- **Growing enrollment and funding:** Enrollment in state-funded preschool reached new highs in the 2024-25 school year (exceeding pre-pandemic levels) to serve 37% of four-year-olds and 9% of three-year-olds. Though growth is uneven across states and over half of three- and four-year-olds remain unserved by state pre-K programs or Head Start, many states are increasing access and funding for state preschool.²
- **Market structure:** The pre-K curriculum market functions in a state of limited competition with a small number of predominant curriculum developers and suppliers:
 - Teaching Strategies dominates,
 - HighScope is a longstanding secondary leader,
 - Frog Street is rapidly growing, and
 - 20+ additional suppliers have significantly smaller footprints that vary across states.
- **States' role in product selection:** States can play a significant role in supporting the selection of curriculum and assessment products. 29 states provide approved or recommended lists of pre-k curricula, with Creative Curriculum approved by ~86% and HighScope approved by ~76% of these states. 33 states provide required or approved lists of pre-K assessments, with Teaching Strategies GOLD approved in ~58%, HighScope's COR approved in ~21%, and Work Sampling System (WSS) approved in ~21% of these states.
- **Implication for funders:** This is a large and growing market with major access headroom—but without targeted action, purchasing decisions will continue to reflect incumbency and compliance rather than proven child impact.

The Case for Action

Extensive research shows that high-quality preschool curriculum is one of the most powerful levers shaping what and how children learn.¹ Yet the current market for preschool curriculum is fragmented, inequitable, and chronically under-researched. While evidence shows that strong, well-implemented curricula can dramatically improve early learning outcomes, most educators lack access to rigorous, developmentally grounded materials. Instead, educators often navigate the market with limited information on materials' efficacy, quality, and cost.

We now face a rare opportunity: **States are expanding access to publicly funded pre-K seats at a scale not seen before, the market for instructional materials is exceeding \$1B, and demand for better curricular options is rising.** But without targeted action, products will continue to be selected based on history and marketing rather than evidence of quality—limiting programs' ability to identify and adopt the highest-quality tools for their communities.

¹“Chapter 2: Evidence on the Effectiveness of Preschool Curricula.” National Academies of Sciences, Engineering, and Medicine. 2024. A New Vision for High-Quality Preschool Curriculum. Washington, DC: The National Academies Press. <https://doi.org/10.17226/726>.

²“State of Preschool Yearbook 2025.” NIEER. <https://nieer.org/state-preschool-yearbook>

What High-Quality Looks Like

A seminal study from the National Academies of Science, Engineering, and Medicine (NASEM) states that a **high-quality curriculum** should:

- **Incorporate the perspectives**, experiences, cultures, languages, strengths, and needs of a diverse range of children, families, and workforce settings,
- **Include rich and meaningful content** that centers child engagement and agency,
- **Include well-designed learning experiences, intentional responsive teaching strategies, well-defined objectives and outcomes, embedded formative assessments, and differentiation** based on understanding children's ability levels, cultural and linguistic backgrounds, interests, and dispositions,
- **Have a scope and sequence that follows children's ways of thinking and learning**, is grounded in research-validated learning trajectories, and affirms children's cultural and linguistic backgrounds while providing effective supports for children with disabilities, and
- **Demonstrate effectiveness in yielding positive school and life outcomes** for the children and families they are intended to reach.

The NASEM study underscores that high-quality preschool curricula must be well-planned and research-based, providing educators with a clear scaffold that guides what to teach, how to engage children in learning, and how to adapt instruction for individual, cultural, and linguistic diversity. This kind of structured support is especially important in classrooms where teachers have limited preparation, content knowledge, or instructional coaching, and where children bring a wide range of abilities and backgrounds. Together, these elements reflect what both research and the field identify as essential for strong, developmentally grounded teaching and learning.

Evidence Gap: Claims ≠ Proven Impact

The evidence base behind most pre-K curricula has significant gaps. Many products lack rigorous third-party efficacy studies. Reviews of curricula currently available (e.g., Head Start's Curriculum Consumer Report and the What Works Clearinghouse reports) frequently find limited or no evidence of effectiveness for commonly used curricula.

Key findings include:

- **No clear relationship** between curriculum popularity and evidence of effectiveness.
- Major discrepancies across products in the **strength of the efficacy evidence**, with some curricula supported by multiple studies and others with **no studies at all**.
- Suppliers often cite **alignment claims or internal research** rather than externally validated evidence.
- Insufficient attention to **culturally and linguistically diverse children** to ensure that curricula serve all children.
- Programs rarely cite evidence as a driver of purchasing; instead, they rely on state/Head Start requirements and guidance, leaders' experience, teachers' preferences, and **cost/logistics**.
- Bottom line: The marketplace rewards **popularity and compliance, not proven child impact**—exactly where philanthropic and state leaders can change incentives.

The Call to Action: Catalyzing Change

The following high-leverage actions can help create a healthier pre-K market more focused on child outcomes.

1. **Build a stronger evidence base:** Invest in independent, rigorous studies of widely used and emerging products, focusing on child outcomes, implementation fidelity, and impact across learner subgroups. To strengthen the research base supporting high-quality, research-based curricula, an expert advisory group has developed a [research agenda](#) that builds on the NASEM study and advances the design, implementation, and evaluation of contemporary preschool curricula.
2. **Improve market transparency:** Support tools that summarize pricing, PD burden, assessment costs, and evidence of quality in one place for system leaders, reducing information asymmetry. ([EdReports is conducting reviews of pre-K curriculum to start to fill this information gap.](#))
3. **Meet unmet needs in the field:** Support new tools and improved curriculum guidance for dual-language learners, children with disabilities, and trauma-informed practice, which educators consistently cite as areas where current curricula fall short.
4. **Strengthen implementation systems:** Fund coaching models, train-the-trainer pipelines, and usable fidelity tools so educators can implement curricula effectively—whether they stick with their current curriculum or transition to a new one.
5. **Use policy levers effectively:** Help states refine curriculum approval criteria, strengthen review cycles, and develop a coherent instructional system across diverse program settings that supports their use of high-quality curricular options.

Why the Market Stays Stuck

A national survey of pre-K teachers found that many programs and school districts use a comprehensive curriculum and then layer domain-specific curriculum on top of it. The market stays stuck this way because of:

- **High switching costs.** Replacing a core curriculum requires multi-year training and system alignment; programs often retain a comprehensive main curriculum for 5–10+ years, even when better options exist.
- **Lack of transparency.** Pricing for curriculum bundles, digital components, assessment subscriptions, and PD/coaching is rarely clear. The true “total cost of implementation” is difficult for leaders to calculate.
- **Information asymmetry.** Program leaders cannot easily compare products on: implementation demands, PD requirements, evidence strength, time burden on teachers, or fit for multilingual learners or children with disabilities. This results in inefficient decision-making and reinforces advantages for incumbent suppliers.
- **Variance in state lists and the frequency of their review cycles.** While some states review new curricula on a rolling basis, others don't conduct reviews at all or do so infrequently (e.g., every 5–7 years). In addition, states are not always set up to review domain-specific curricula or open educational resources.

⁴ “How Public School-Based Pre-K Teachers Use and Combine Instructional Materials.” RAND. 2025.

https://www.rand.org/pubs/research_reports/RRA4412-1.html

Implementation Considerations

Philanthropic or state investments designed to support sustained instructional improvements should anticipate several costs associated with effective implementation of high-quality preschool curriculum:



Comprehensive curriculum
(~\$2,500–\$4,000+ per classroom, with variability by digital components and language versions)



Assessment
(~\$12–\$15 per student annually)



Consumables
(\$500+ per classroom)



Professional development and coaching
(the largest long-term cost driver, often requiring multi-day initial training plus ongoing professional development and embedded coaching)

Conclusion

*The pre-K curriculum market is at a pivotal moment: expanding access, growing investment, greater accountability for results, and clearer signals of where the ecosystem breaks down. **Philanthropic and state leadership can shift the field** from a system dominated by incumbency, opacity, and uneven evidence to one grounded in transparency, effectiveness, and responsive design—ultimately ensuring that more children experience rich learning across every domain.*

