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Education Market Advisor: News, Insights & Trends Shaping the Education Industry has been the pre-eminent source of business news and analysis for educational publishing and marketing for over 40 years. Each issue is tightly packed with news and alerts to upcoming adoptions, mergers and acquisitions and tested success strategies for PreK-12 and college markets. Our publication is relied upon by top executives and decision makers at leading companies involved in the business of educational publishing.

Our editorial team uses exclusive rankings of PreK-12, college and supplemental publishers by revenue and market share to benchmark publisher operations and help you evaluate and contrast them against each other.

Our editors continually evaluate trends affecting the industry, assessing market opportunities, benchmarking performance among market leaders, and developing realistic, effective strategies for maximum short- and long-term growth among companies that provide instructional technology products and services.

With an emphasis on delivering Simba's unique brand of metrics, analysis and short-and long-term perspective on events shaping the instructional materials industry, Education Market Advisor stands apart from other publications targeted to the educational publishing community.

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Spotlight on Otus: Where Instruction Now Lives

At 9:12 a.m., a principal may be toggling between an assessment dashboard, a curriculum portal, an attendance report, and an email from a teacher asking for updated assessment data to plan small-group instruction. The issue is not a shortage of data. It is where that data lives, how quickly it can be interpreted, and whether it can be translated into instructional action without adding more work to teachers' days. This distinction—between access to information and the ability to use it—is increasingly visible in how districts describe their daily reality.

That tension sits at the center of Simba Information's recent interview with Chris Hull, President and Co-founder of **Otus** (Chicago, IL). What Hull describes from the field aligns closely with what Simba's historical market data has been indicating for years: districts have steadily rebuilt their instructional environment around platforms, digital delivery, and embedded assessment, but the tools inside that ecosystem were never designed to function as a single, coordinated system.

This is not a new development. It is the result of a ten-year spending migration that has quietly reshaped how instruction is delivered and measured.

From 2014 to 2024, Simba's coverage of the PreK-12 instructional materials market shows—most notably in the decline of basal curriculum from 39% to 23% market share and the rise of classroom assessment to 19% of sales—that district dollars moved out of standalone basal curriculum and print supplements and into courseware platforms, digital supplements, and classroom assessment systems.

Basal curriculum's share fell from 39% in 2014 to 23% in 2024.

Over the same period, courseware and digital supplements grew to represent more than one-third of the market, while classroom assessment emerged as one of the largest and fastest-growing segments.

Districts did not reduce curriculum investment. They reorganized it into instructional ecosystems where content, delivery, and measurement coexist inside platforms.

Hull's description of the problem Otus is addressing sits directly inside this structural change. Otus operationalizes this shift by sitting across curriculum, assessment, and digital tools, allowing educators to move from student performance insight to instructional action without navigating multiple systems.

"We are now in a world with more data than ever, but the real question is: how do we make it meaningful without adding more work to educators' plates?"

What Simba Sees in the Market

Simba's historical analysis reveals three consistent purchasing priorities that have emerged across the past decade:

- Instruction is delivered through platforms rather than standalone programs.
- Instruction is measured through embedded, formative assessment rather than periodic testing.
- Content increasingly lives inside digital ecosystems rather than being purchased independently.

For vendors and publishers, these priorities signal a shift in how value is evaluated: products are increasingly judged not only on quality, but on how well they integrate into and support this broader instructional ecosystem.

These shifts accelerated during COVID, but were already visible in district purchasing patterns years earlier. By 2024, courseware, digital supplements, and classroom assessment collectively outweighed basal curriculum in both share and growth.

The practical implication for districts is a layered environment—often spanning an LMS, core curriculum platform, assessment system, intervention tool, attendance/behavior tracker, and multiple content resources—where specialized tools coexist but rarely share information in ways that support rapid instructional decision-making. This specialization has resulted in operational fragmentation for districts, and the challenge now is coordinating those tools into a usable whole.

What Hull Describes from District Practice

Where Simba sees structural market change, Hull sees daily operational friction.

Hull does not describe a lack of technology in schools. He describes the friction created by having too much of it operating in isolation.

"Companies are generating more data, more information, and creating the need for more analysis. But educators are still living in that same fragmented world."

At the same time, districts are facing teacher shortages, turnover, and reduced ESSER funding, while still being asked to demonstrate measurable student growth and accountability.

"Teachers are being asked to be content experts, child development experts, technology experts, and now data experts. That is not sustainable."

The issue, Hull explains, is not that districts lack tools. It is that the data from those tools live across the very ecosystem districts have been constructing for the past decade—courseware platforms, digital instructional programs, assessment products, and content providers that rarely share information fluidly at the point of instruction.

Otus as a Response to Ecosystem Complexity

Otus is one example of a broader category of tools emerging across the market to help districts coordinate the increasingly complex instructional ecosystems they have built over the past decade.

Hull describes Otus not as a new instructional product, but as:

"a secure wrapper around all district data that allows educators to ask meaningful questions and act on those insights immediately".

This framing is important. Otus is not positioned as curriculum, assessment, or content. It is designed to sit across them, reducing the time and effort required to move between systems.

"Teachers are not going to ask a question and then not do anything with the answer. They need to build a lesson. They need to group students. They need to communicate with families. The system has to support that workflow."

This emphasis on workflow explains the continued importance of Otus's partnership with Discovery Education. The value is not simply integration. It is the ability to move from insight to instructional action without leaving the platform or manually transferring information across tools.

"If we identify that a student is struggling with a standard, we should be able to immediately connect them to the right resource. That is where personalization becomes real."

For districts, this represents a shift from data visibility to instructional usability.

AI Within the Constraints of Education Data

This distinction is particularly relevant as districts grow more cautious around AI governance, privacy compliance, and vendor transparency in how student data is accessed and used.

Hull is careful to distinguish Otus' AI approach from consumer AI tools.

"In other industries, AI works because it can see everything. In education, there is no universal student ID across systems. That is the challenge."

Because of privacy, governance, and data-access limitations, AI in education cannot simply be layered on top of existing systems. It must operate within them and respect data boundaries.

"We have to augment teachers. We cannot replace them. A classroom is already at capacity. We cannot scale the learning environment by adding more students, so we have to be more effective with the ones we have."

Otus' AI assistant is therefore designed to help educators synthesize information, generate reports, draft communications, visualize trends, and identify next steps—tasks that remove administrative friction rather than replace instructional practice.

"The biggest gap we found is that educators are not used to having access to real-time data. They are used to looking backwards."

This observation reflects a broader market reality: districts have spent a decade building systems that capture data continuously, but only recently have tools begun to allow educators to interact with that data conversationally and contextually.

Customization Over Standard Dashboards

One of the key lessons Hull noted over the past year is that districts do not want generic dashboards.

"A district performing at the 90th percentile asks very different questions than a district at the 30th percentile. The data may be similar, but how it needs to be visualized is completely different."

This has pushed Otus away from standardized reporting toward customized data assembly based on district context. For market observers, this signals that the next phase of edtech is less about feature parity and more about adaptability to district priorities. It also reflects a shift in buyer expectations: districts are no longer satisfied with tools that simply present data—they expect systems to present data in ways that directly support their specific instructional goals and decision-making processes.

Interoperability as a Growing Tension Point

Hull was candid about a challenge that extends beyond Otus.

"Some companies are building moats and drawbridges instead of allowing interoperability. If a district pays for content, they should be able to launch it from anywhere."

He compares this to streaming platforms, where content can be located and accessed regardless of where it lives. In education, he argues, the same principle should apply.

This perspective reflects the reality Simba's data shows: as instruction, assessment, and content moved into platforms, interoperability became essential to making those ecosystems function.

This dynamic is visible beyond Otus. A recent example is the January 2026 partnership between Great Minds and Renaissance, which connects Eureka Math curriculum directly with Star Math assessment insights inside Renaissance Next to streamline planning and personalize instruction. Rather than existing as separate curriculum and assessment tools, the integration is designed to allow educators to move seamlessly from performance data to instructional resources within the same workflow.

Simba will be speaking with Renaissance in the coming weeks to explore how this and similar partnerships are addressing the same ecosystem challenges Hull describes from the district perspective.

Where Otus Sits in the Current Market Structure

Simba's historical analysis shows that districts have steadily invested in platforms that deliver instruction, measure learning through embedded assessment, and house content digitally. Otus is positioned at the intersection of these investments.

It does not replace curriculum, assessment, or content. It connects them in a way that reflects how districts already operate.

For EMA readers, the implication is practical: evaluate whether your products, partnerships, and integrations help districts reduce the operational complexity created by a decade of specialized tool adoption—or add to it.

Conclusion: An Instructional Intelligence Layer for a Platform-Driven Market

In earlier coverage, Otus was described primarily as a data consolidation platform. What this year's interview suggests is that Otus is increasingly functioning as an instructional intelligence layer across the ecosystem districts have been building for more than a decade.

"We want to reduce the friction outside of the teaching and learning relationship so educators can focus on what actually moves the needle."

For publishers, edtech providers, and districts, Otus provides a view into how the next phase of the market is less about adding tools and more about making existing ones work together in real time, aligned to how instruction is actually delivered. As districts move through 2026 and 2027, the vendors and partners best positioned for growth will be those that help schools simplify, connect, and operationalize the complex instructional ecosystems they have already built.

Federal Education Budget 2026: Fiscal Retrenchment, Enforcement Shifts, and Market Implications

The passage of the 2026 federal education budget reflects a shift away from pandemic-era expansion toward a more constrained and selectively targeted funding model. While core formula programs remain intact, competitive grants, enforcement capacity, and discretionary initiatives are being narrowed or restructured. For districts, the issue is not simply aggregate spending levels, but the predictability, timing, and conditions attached to federal support.

During the pandemic recovery period, districts operated with elevated federal aid through ESSER and related programs. That temporary expansion masked longer-term pressures tied to enrollment softness, staffing costs, and uneven state revenue growth. The current budget cycle removes much of that cushion while simultaneously introducing mid-year adjustments and administrative changes within the US Department of Education.

Recent federal developments fall into three operational categories:

- reductions or eliminations affecting specific competitive grant programs
- organizational restructuring and staffing changes within the Department of Education
- a measurable slowdown and recalibration in federal civil rights enforcement activity

These changes are unfolding as districts recalibrate post-ESSER spending models and as state-level policy divergence continues to widen. The combined effect is a funding environment defined less by expansion and more by constraint, compliance variability, and heightened scrutiny of discretionary expenditures.

Federal Appropriations Structure: Core Formula Protection Amid Discretionary Contraction

Congress has passed a budget that largely protects formula-driven programs while narrowing discretionary and competitive funding streams. Title I and IDEA remain intact as foundational allocations, preserving baseline support for low-income students and special education services. Education Week reporting on the enacted 2026 budget indicates schools can expect roughly similar year-over-year funding levels for key formula programs such as Title I and IDEA, signaling baseline stability without stimulus-level expansion. Outside of those core formulas, discretionary education spending has flattened or declined relative to pandemic-era highs, signaling a return to pre-ESSER fiscal norms.

Several competitive grant programs and targeted initiatives have been reduced, consolidated, or eliminated. Education Week estimates at least $12 billion in K-12-related funding disruptions during the first year of the current administration, spanning grant programs across multiple federal agencies. Reported disruptions include reductions, terminations, or program changes affecting initiatives tied to enrichment programming, nutrition, facilities modernization, violence prevention, and education-related research, among other areas. Many of these grants functioned as enhancement tools rather than baseline funding, allowing districts to pilot programs, expand services, or support staffing beyond formula-funded obligations.

For districts, the operational impact centers on timing, cash flow, and planning reliability rather than aggregate federal totals. Because many affected programs are award-based and time-bound, districts can face abrupt implementation changes mid-cycle—often requiring rapid staffing, contracting, and program-scope adjustments. Mid-year revisions require districts to reopen adopted budgets and reassess staffing commitments, vendor contracts, and multi-year initiatives. These recalculations are occurring alongside:

- the expiration of federal relief funds
- ongoing staffing shortages and wage pressures
- elevated transportation and facilities costs
- enrollment softness in urban and certain suburban markets

As Simba has previously documented in Publishing for the PreK-12 Market, districts entered the post-ESSER period facing what many described as a “funding cliff,” particularly as stimulus-supported instructional and technology purchases wound down.

The 2026 budget therefore accelerates districts’ transition from stimulus-supported expansion to more constrained operating models.

Table 1. Summary of Affected Federal Education Funding Categories (2025–2026)

Funding Category	Status Under 2026 Budget	Operational Impact on Districts
Title I (Formula)	Largely held flat	Baseline stability; no stimulus-level expansion
IDEA (Formula)	Largely held flat	Continued mandated services without major increase
Competitive / Discretionary Grants (Multiple Agencies)	Reduced, terminated, or restructured	Program interruption risk; fewer funded pilots and supplemental services
Teacher Leadership / Differentiated Roles	Under local budget pressure as stimulus funds expire	Potential reductions in coaching, mentoring, and instructional support roles
Community Schools / Enrichment Supports	Documented grant disruptions and cancellations in some cases	Mid-year service reductions (e.g., tutoring, after-school supports)
OCR Title IX (K-12 sexual harassment/assault) Resolution Agreements	No K-12 resolution agreements reported for 2025 in one category	Reduced federal resolution activity in a core enforcement area

Source: Simba Information

Mid-Year Adjustments: Budget Reforecasting and Staffing Realignment

Schools are now bracing for mid-year funding adjustments tied to recently enacted legislative changes. Regardless of political framing, districts must revise spending assumptions after budgets have already been set.

One of the earliest indicators of fiscal tightening appears in personnel structures. Reporting indicates that teacher-leadership roles—often funded through discretionary or supplemental streams—are among the first areas facing reductions as budgets tighten. These roles frequently support instructional coaching, curriculum alignment, and professional development. Their contraction could influence implementation timelines for new instructional materials and digital platforms.

From a market perspective, tightening local budgets may shift purchasing behavior in several ways:

- greater scrutiny of renewal contracts
- slower adoption cycles in open territories
- increased demand for bundled or scalable solutions
- emphasis on demonstrable ROI and alignment to state mandates

This aligns with historical patterns observed during previous funding contractions, including the post-2008 environment and transition periods tracked in Simba's Competitive Analysis coverage.

Enforcement Capacity and Departmental Restructuring

Policy shifts are not limited to appropriations. Structural changes within the US Department of Education have drawn attention, particularly regarding the Office for Civil Rights (OCR).

Recent reporting indicates:

- OCR resolved no K-12 sexual harassment or assault complaints in 2025, according to publicly available federal data cited in K-12 Dive reporting.
- The Department paid approximately $38 million to laid-off OCR staff while dismissing or closing most pending complaints, according to analysis of federal data.
- A GAO-referenced period described indicates OCR received more than 9,000 complaints and recorded 7,072 complaint resolutions during a span when many staff were on leave due to reductions in force, with the majority of those resolutions recorded as dismissals.

New Guidance Signals a Move Toward Team-Based Staffing Models Within the Department

A separate K-12 Dive analysis found OCR entered into no K-12 resolution agreements for sexual harassment and assault cases in 2025, marking a measurable change in outcomes within a specific Title IX enforcement category.

Together, these actions indicate a measurable slowdown in federal complaint resolution activity and a restructuring of enforcement staffing and management. Whether this represents a temporary administrative constraint or a longer-term policy shift remains unclear. However, reduced federal intervention could increase variability in state-level enforcement and compliance interpretation.

For districts—and by extension vendors—this may result in:

- increased reliance on state policy frameworks
- greater divergence in compliance requirements across jurisdictions

- heightened sensitivity around Title IX, DEI-related initiatives, and curricular review processes

Simba's National Instructional Materials Adoption Scorecard noted that state legislatures have already expanded their influence over curriculum and instructional materials, often introducing additional evaluation layers and review criteria.

Legal Rulings and Federal Direction on DEI-Related Policy

In parallel, the administration has secured a legal victory allowing enforcement of certain anti-DEI directives to proceed, as reported in federal court coverage. This decision may affect:

- grant eligibility requirements
- professional development programming
- curriculum frameworks in adoption states

Given that adoption states represent approximately half of the instructional materials market by structure, policy shifts at the state level—particularly in large markets such as Texas and Florida—can materially influence vendor product strategy, customization requirements, and sales cycles.

The combined effect of anti-DEI directives, expanded parental rights statutes, and instructional transparency requirements is increasing compliance complexity, particularly in adoption states where centralized review processes already shape market access.

Postsecondary Budget Signals and Agenda Constraints

At the postsecondary level, reporting suggests that elements of Congress' budget may limit aspects of the administration's broader education agenda. This tension highlights a structural reality: while the executive branch shapes policy direction, appropriations remain subject to congressional negotiation.

Current federal conditions include:

- selective fiscal restraint
- administrative realignment
- ongoing legal contestation
- state-level acceleration of policymaking

Strategic Implications for the Education Market

The 2026 federal education budget does not signal a collapse in funding, but it does mark a transition toward tighter fiscal discipline and greater variability in deployment. Three forward-looking implications are particularly relevant for education vendors and institutional stakeholders.

First, discretionary expansion is slowing. With competitive grants reduced and mid-year adjustments more common, districts are prioritizing required services and deferring new pilots, layered staffing models, and experimental initiatives. Procurement cycles may lengthen, and renewal decisions may face heightened scrutiny tied to measurable outcomes.

Second, state-level authority is gaining operational weight. As federal enforcement activity slows and compliance interpretation shifts, states are increasingly defining curriculum boundaries, transparency expectations, and review procedures. For vendors, this means product alignment must be calibrated not only to standards but to evolving statutory environments across regions.

Third, cost efficiency and implementation clarity are becoming decisive factors. District leaders are examining total cost of ownership, integration timelines, and staffing implications before approving new contracts. Solutions that require minimal additional personnel, offer modular pricing, or integrate with existing systems may face fewer barriers in constrained budgets.

Looking ahead, appropriations stability, rulemaking clarity, and enforcement guidance will shape whether districts regain budget confidence or continue operating conservatively. If discretionary funding remains constrained and enforcement capacity remains reduced, districts are likely to institutionalize leaner staffing models and longer procurement cycles.

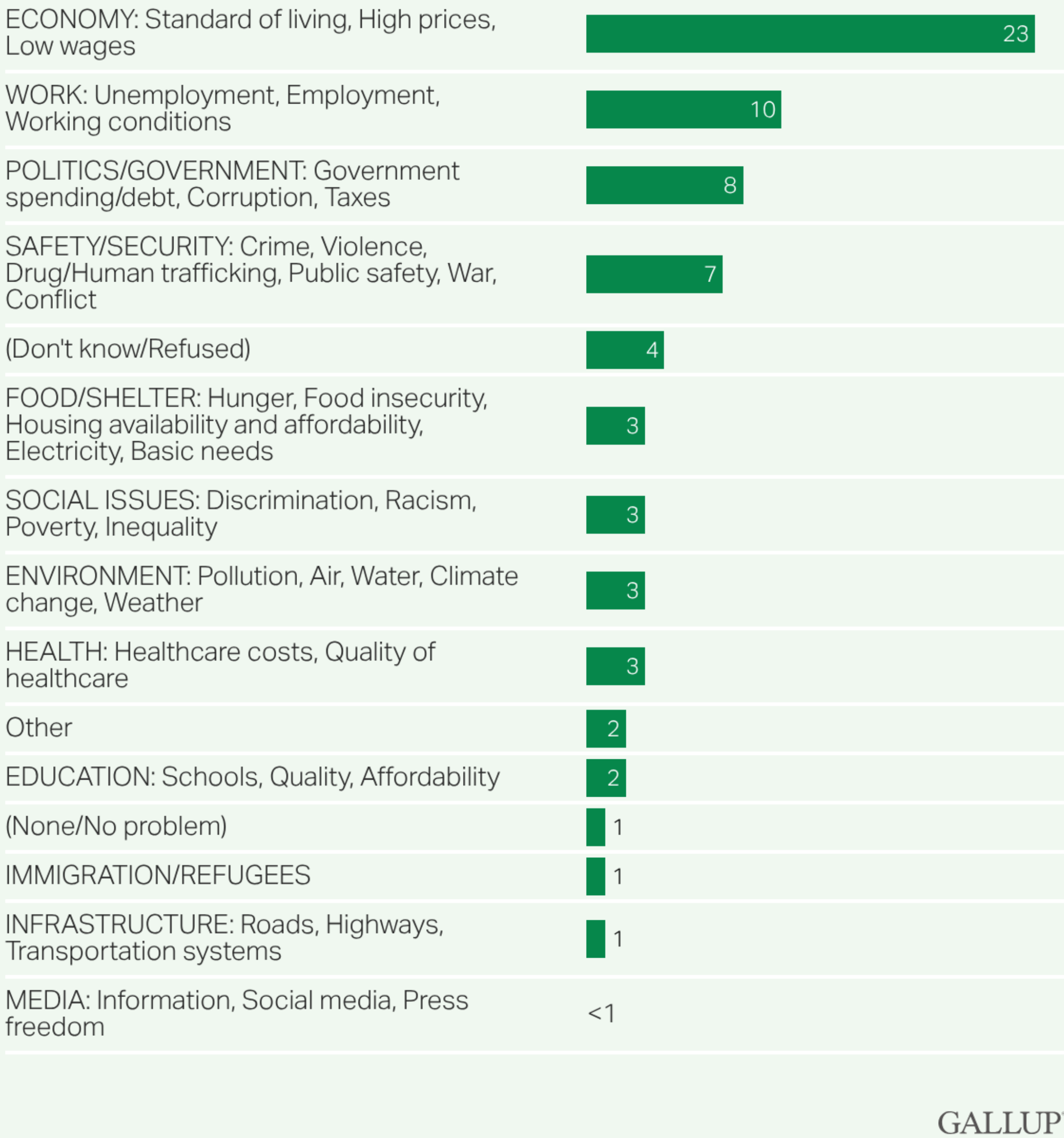
For market participants, the implication is clear: growth in 2026 will depend less on federal expansion and more on capturing share within existing allocations. Vendors positioned around measurable outcomes, statutory alignment, and cost containment will be better situated than those reliant on discretionary grant-funded pilots. In the current federal posture, competitive advantage appears to be shifting from innovation velocity to fiscal durability.

EMA Pulse

EMA Pulse. Top Perceived National Problems Worldwide (Global Median Percentages)

Top Perceived National Problems (% global medians)

According to you, what is the most important problem your country is facing currently?



Notes: Global median percentages of respondents identifying the most important problem facing their country at the time of survey. Economic concerns—including standard of living, high prices, and low wages—rank highest, followed by employment-related issues and concerns about government performance.

Source: Gallup, "Top Perceived National Problems (% Global Medians"

US Trade Publishing in 2025: Revenue Rebound, Format Shifts, and Escalating Policy Pressure

The US publishing market in 2025 closed the year with measurable momentum, though the recovery was uneven across segments and formats. Monthly data from the Association of American Publishers (AAP) StatShot reports show a year that began with contraction in trade categories before regaining strength in the fourth quarter. Overlaying that revenue trajectory are operational constraints, copyright litigation involving major technology platforms, and federal policy shifts affecting library and institutional channels.

Revenue Arc: From Midyear Contraction to Q4 Recovery

The second half of 2025 illustrates the industry's volatility. In July, total publishing revenues declined 4.2% year over year to $1.3 billion, with Trade (Consumer Book) revenues down 11.9% to $680.9 million. Year-to-date trade revenues at that point were down 4.1%, totaling $5.0 billion. Hardback revenues fell 9.6% to $203.9 million, paperbacks declined 14.8% to $245.7 million, and digital audio dropped 18.5% to $89.4 million.

August extended the softness. Overall revenues were down 4.4% to $1.6 billion, and trade revenues declined 9.4% to $791.5 million. Year-to-date trade performance through August was down 5.3%, at $5.8 billion. Paperbacks fell 11.8% during the month to $280.6 million, while hardbacks declined 9.2% to $277.4 million.

September marked a reversal. Total industry revenues rose 14.4% year over year to $1.7 billion. Trade revenues increased 10.9% to $1.0 billion, driven by hardback growth of 14.5% ($466 million) and paperback growth of 15.1% ($321.6 million). Even so, year-to-date trade revenues through September remained down 3.2%, at $6.8 billion, underscoring the depth of the earlier contraction.

Momentum continued into the fourth quarter. In October, total revenues were up 6.7% to $1.5 billion, with trade revenues rising 3.5% to $1.1 billion. November revenues increased 1.9% year over year to $1.2 billion, and trade revenues grew 3.1% to $972 million. December closed the year strongly: total revenues were up 9.4% to $1.0 billion for the month, and trade revenues rose 14.2% to $830.4 million.

By year-end, overall industry revenues reached $14.6 billion, up 1.1% year to date. Trade revenues totaled $9.8 billion, down 0.5% year over year—an improvement from the midyear declines but still reflective of uneven recovery.

The data reveal a clear pattern: midyear softness followed by concentrated Q4 strength. The industry did not experience a broad-based surge but rather a seasonal rebound that stabilized annual results.

Table 2. Trade (Consumer Books) and Professional Books; Year-over-Year Percentage Change by Month (July–December 2025) and Full-Year 2025 Year-to-Date Change

Segment / Format	July 2025	August 2025	September 2025	October 2025	November 2025	December 2025	Year-to-Date (Dec)
Trade (Consumer Books) Total	-11.9%	-9.4%	+10.9%	+3.5%	+3.1%	+14.2%	-0.5%
Hardback	-9.6%	-9.2%	+14.5%	+4.5%	+7.3%	+13.5%	+2.4%
Paperback	-14.8%	-11.8%	+15.1%	+1.5%	-1.9%	+27.5%	-3.4%
Mass Market	-8.5%	-16.6%	-6.5%	-22.7%	-66.5%	-61.6%	-29.2%
Special Bindings	+0.6%	-14.1%	+5.4%	-4.9%	+9.0%	+13.8%	+0.3%
eBooks	-3.7%	-3.4%	-7.9%	+1.9%	+2.1%	-2.8%	-0.3%
Digital Audio	-18.5%	-2.7%	-0.6%	+7.3%	+15.8%	-0.8%	+2.1%
Professional Books	-9.0%	-22.3%	-12.1%	0.0%	0.0%	+13.5%	-6.5%

Notes: All monthly figures represent year-over-year percentage change for that specific month in 2025 compared to the same month in 2024, as reported in AAP StatShot releases. The "Year-to-Date (Dec)" column reflects cumulative year-over-year percentage change for full-year 2025 compared to full-year 2024 (as reported in the December 2025 StatShot). Trade performance shows sharper month-to-month volatility, particularly in mass market and paperback formats, while Professional publishing reflects a more sustained contraction through Q3 before stabilizing in Q4. Despite late-year gains, both categories finished 2025 below prior-year levels on a full-year basis.

Source: Association of American Publishers (AAP)

Format-Level Divergence: Print Resilience, Audio Moderation, Mass Market Decline

Within trade publishing, format performance diverged significantly.

Hardbacks showed relative stability. Year-to-date hardback revenues reached $3.7 billion, up 2.4% compared to 2024. December hardback revenues alone totaled $307.6 million, up 13.5% year over year.

Paperbacks were more volatile. Although December paperbacks rose 27.5% to $296.3 million, year-to-date paperback revenues finished down 3.4% at $3.3 billion.

Mass market paperbacks continued to decline sharply. December revenues fell 61.6% to $3.9 million, and year-to-date revenues dropped 29.2% to $84.9 million—maintaining a pronounced gap versus other print formats in the StatShot series.

Digital formats showed mixed signals. Year-to-date eBook revenues were essentially flat, totaling $1.0 billion (down 0.3%). Digital audio reached $1.0 billion for the year, up 2.1%, though monthly performance varied across the second half of the year. Physical audio remained marginal, with year-to-date revenues of $6.1 million, down 31.2%.

These figures reinforce a structural conclusion: print continues to anchor trade publishing revenues, while digital audio maintains growth but no longer delivers the outsized gains seen in prior expansion cycles. The mass market segment, by contrast, appears in sustained contraction.

Religion Publishing Outperforms the Broader Trade Market

One of the clearest outperformers in 2025 was religion publishing. In December, religious press revenues rose 16.8% to $78.4 million. For the full year, religious revenues increased 2.9% to $926.4 million.

Monthly spikes were particularly pronounced in September (up 21.2% to $92.0 million) and October (up 10.6% to $102.4 million). Even during weaker summer months, religion's declines were less severe than those of the broader trade category.

The segment's relative strength stands in contrast to the broader trade category, which finished the year marginally below 2024 levels. Religion publishing's positive year-to-date growth reflects differentiated demand patterns within the overall consumer market.

Professional Publishing Remains Under Pressure

Professional publishing, including business, medical, legal, technical, and scientific books, underperformed relative to trade. In December, professional revenues were up 13.5% to $42.5 million, but year-to-date revenues finished at $433 million, down 6.5% compared to 2024.

Earlier in the year, year-to-date professional revenues were down 9.8% through August and 10% through September. The December uptick narrowed, but did not eliminate, the annual decline.

Supply Chain Constraints and Holiday Demand

Industry reporting from Publishers Weekly indicates that holiday demand at independent bookstores was strong, while fulfillment reliability remained a binding constraint. Booksellers cited "unexpected shipping delays of two weeks and more" from major suppliers throughout December, which "put a damper on an otherwise strong sales season". Publishers and distributors attributed the problems in part to higher-than-expected volume and a compressed holiday calendar, with Thanksgiving falling on November 27.

Copyright Litigation and Platform Friction

Beyond sales metrics, 2025 saw intensified legal conflict between publishers and technology platforms. Publishers (via the Association of American Publishers) continued efforts to allow two AAP members—Hachette Book Group and Cengage—to intervene in a class action copyright infringement lawsuit involving Google and its generative AI product Gemini. The case was originally brought in 2023 and is before Judge Eumi K. Lee in the US District Court for the Northern District of California.

This legal posture signals a broader recalibration. Publishers are increasingly framing AI not only as a distribution or discovery tool but as a licensing and compensation issue. The outcome of these disputes may shape metadata governance, licensing frameworks, and revenue participation in AI ecosystems.

Federal Policy and Library Market Exposure

Policy developments also introduced uncertainty for library and institutional channels. A February 6, 2026 ProPublica report on the Institute of Museum and Library Services (IMLS) described new grant-cycle cover letters that "particularly welcomes" projects aligned with President Donald Trump's vision for America—criteria the outlet characterized as a departure from prior, merit-focused guidance. Former agency leaders and sector associations voiced concern that the shift could shape funded programming and historical framing.

Library channels remain material for trade, children's, and educational publishers. Adjustments in grant criteria or allocation mechanisms can influence subject mix, procurement cycles, and long-term investment decisions.

Structural Signals for 2026

The 2025 data point to several structural dynamics:

- Revenue concentration in Q4 masked midyear softness.
- Hardback stability supported annual trade results, while mass market continued structural decline.
- Religion publishing outperformed the broader market.
- Professional publishing remained in contraction despite late-year improvement.
- Legal and policy pressures are emerging as strategic variables alongside consumer demand.

The industry closed 2025 with aggregate stability—overall revenues up 1.1% year over year—but beneath that stability lies segmentation. Growth is available, yet it is format-specific, seasonally concentrated, and increasingly shaped by regulatory and platform dynamics rather than consumer demand alone.

Simba Radar

This week's signals point to a sector recalibrating under sustained academic pressure, political scrutiny, and rapid technological integration. Artificial intelligence, curriculum reform, literacy mandates, and digital access are no longer emerging themes but operational realities shaping district and state decision making. The central question is not whether innovation will continue, but how systems will govern its use, measure impact, and restore core academic performance with consistency and accountability.

AI in Schools: Policy Acceleration Meets Classroom Reality

Recent reporting reflects growing state-level activity around AI governance, age restrictions, and classroom oversight. Coverage referencing a Common Sense Media report, as discussed by Education Week, indicates that many adults support age limits and stronger protections for children when it comes to AI companions and social media. At the same time, reporting from Education Week and EdWeek Market Brief highlights state efforts to develop or clarify guidance on generative AI use, procurement standards, and student data protections. District-level recalibration is also visible, including device return policies and tighter in-class controls, as illustrated by EdSource reporting on Fresno Unified's shift away from take-home laptops.

Guidance is consolidating around safety evaluation and procurement. The EdSAFE AI Alliance's S.A.F.E. by Design work frames student-facing AI companions as a distinct risk category and outlines safeguards related to privacy, transparency, human oversight, and escalation pathways for harm. Administrator-facing guidance, including the SAFE AI framework checklist, positions these guardrails as procurement and governance questions rather than classroom-level recommendations alone, grounding the approach in the alliance's S.A.F.E. by Design report and related policy reporting.

Key developments:

- States are increasing legislative scrutiny of AI's role in schools, including procurement and data governance standards.
- Public opinion data shows support for age-based restrictions and clearer usage boundaries.
- Advocacy groups and alliances are advancing policy frameworks focused on student safety and digital well-being.

- Districts are revisiting 1:1 device assumptions, shifting toward structured in-class use and monitored access models.

Reporting on teacher AI usage suggests adoption remains pragmatic and task-oriented. Education Week indicates educators are primarily using AI for lesson planning, differentiation, and administrative efficiency rather than instructional replacement.

Market Signal: The AI market in education is moving from experimentation to compliance and risk management. Vendors positioned around safety validation, documented efficacy, privacy alignment with FERPA and state statutes, and district-aligned governance frameworks, may gain advantage over tools marketed primarily for novelty.

Literacy and Math Reform: From Mandate to Implementation

State leaders and federal policymakers continue to intensify focus on literacy and mathematics outcomes in response to assessment data. Results from the National Assessment of Educational Progress (NAEP) and the NAEP long-term trend assessments continue to show persistent reading and math gaps across student groups. Congressional inquiry into science-of-reading implementation and renewed literacy funding proposals reflect pressure to move beyond standards adoption toward demonstrable improvement.

International benchmarks such as TIMSS have reinforced concerns about math performance and competitiveness, contributing to calls for reform. Education Week reporting on statewide math framework overhauls highlights mixed implementation results, particularly when shifts in instructional sequencing and equity-driven approaches are not accompanied by sustained professional development.

Notable themes include:

- increased scrutiny around what makes literacy reform effective in practice, including fidelity to structured literacy models
- state-level funding initiatives aimed at accelerating reading achievement through tutoring, curriculum refresh, and teacher training
- mixed outcomes from statewide math overhauls when implementation capacity varies by district
- expanded calls for math reform amid stagnant or declining performance data

Legislative moves such as cursive mandates signal renewed emphasis on foundational skills, while math reform debates reveal tension between equity-focused frameworks and outcome-driven accountability. Instructional shifts are increasingly expected to demonstrate measurable gains.

Market Signal: Mandates alone are not translating into uniform classroom execution. Publishers and service providers able to demonstrate implementation support, sustained professional development, fidelity tracking, and outcome measurement aligned with NAEP and state benchmarks will be better positioned than those offering standards alignment alone.

Political and Legal Crosscurrents

Litigation tied to federal funding threats over state-level student privacy policies underscores ongoing friction between federal and state authority. Reporting on this issue highlights disputes over parental notification, privacy, and federal enforcement posture, illustrating how education governance remains intertwined with broader political debates. California Attorney General Rob Bonta filed suit challenging the US Department of Education's FERPA-related findings and its threat to terminate approximately $4.9 billion in federal education funding unless California adopted corrective actions that state officials argue are not required by FERPA, including changes related to parental notification policies (see the California Department of Justice press release).

At the same time, court decisions affecting academic publishers, including coverage from Higher Ed Dive and Reuters, reflect sustained legal scrutiny around antitrust claims, peer review compensation, and content practices. These cases contribute to a climate in which procurement, pricing, and compliance are subject to heightened review.

Policy volatility continues to influence procurement timelines, vendor messaging, and district risk tolerance, particularly where legislative sessions introduce rapid changes to mandates or technology oversight.

Market Signal: Education governance remains politically charged and legally complex. Vendors operating across multiple states must account for regulatory variability, evolving civil rights interpretations, and shifting compliance expectations that can materially affect market access.

Workforce Alignment and Experiential Learning

Districts are increasingly awarding academic credit for internships and career-based learning, signaling a shift toward relevance and workforce alignment. Education Week reporting on credit-bearing internship models reflects a growing emphasis on competency-based pathways and career-connected learning.

STEM engagement efforts continue to expand, including district esports programming and classroom connections to astronaut Q&A resources and other real-world experiences highlighted in Education Week coverage.

Gaming-based leadership models and vocational alignment efforts show districts using engagement as an instructional strategy tied to measurable competencies.

Market Signal: Career-connected learning is shifting from peripheral programming to credit-bearing infrastructure. Vendors able to align instructional materials and digital platforms with workforce competencies, industry certifications, and accountability requirements may find new growth corridors as districts seek to demonstrate postsecondary relevance.

Infrastructure, Access, and Cybersecurity

Following federal connectivity adjustments tied to E-rate changes reported by K-12 Dive, schools are making difficult decisions about hotspot distribution and digital access models. K-12 Dive reports that ransomware incidents against the education sector have slowed compared with prior peaks, though cybersecurity remains a persistent operational risk.

At the same time, the National Governors Association has released guidance on improving student data dashboards, emphasizing interoperability, transparency, and actionable analytics. Accessibility compliance deadlines, as reported by EdWeek Market Brief, are prompting districts to reassess vendor partnerships and digital platform readiness ahead of upcoming federal requirements.

Market Signal: Connectivity expansion is no longer assumed. District purchasing may prioritize durable infrastructure, cybersecurity resilience, accessibility compliance, and analytics clarity over rapid device scaling, particularly as federal relief funding sunsets.

Strategic Throughline

Across AI governance, literacy mandates, math reform, workforce alignment, and infrastructure recalibration, a clear pattern emerges: systems are tightening in response to performance data, fiscal constraints, and political oversight.

The pandemic era accelerated experimentation and rapid deployment. The current moment emphasizes guardrails, accountability, documented efficacy, and measurable outcomes tied to national and state benchmarks. For market participants, differentiation rests less on technological capability alone and more on policy alignment, implementation support, compliance readiness, and long-term stability.

Innovation remains active but is being absorbed into institutional structure rather than operating at its edge.

Financial Highlights: AI Repositioning and Portfolio Discipline

Generative AI is increasingly embedded within the operating models of education and professional publishing companies. Its impact is visible in shifting learner behavior, changes in perceived content value, pressure on certain revenue categories, and the emergence of new licensing and workflow opportunities. Companies that historically monetized access, aggregation, and study assistance are facing substitution risk, while organizations anchored in proprietary research, contractual licensing, and institutional subscriptions are assessing AI as an incremental revenue and efficiency lever.

The most recent quarterly results from Chegg and Wiley illustrate this divergence. Both companies are pursuing cost discipline, moderating capital expenditures, and reallocating investment toward AI-enabled initiatives. However, their exposure to demand shifts differs. Chegg continues to manage contraction in consumer academic subscriptions while repositioning toward workforce skilling and language learning. Wiley is reporting relative resilience in Research and AI-related licensing, even as its Learning segment reflects print and channel softness. The comparison highlights differing exposure to consumer substitution versus institutional renewal cycles.

Chegg (Santa Clara, CA)

Chegg, a publicly traded digital learning platform serving students and workforce learners, reported Q2 2025 results for the period ended June 30, 2025. The company continues repositioning its portfolio toward skills-based and language learning offerings while managing contraction in its legacy academic subscription services.

Chegg operates primarily through Subscription Services (including Chegg Study and Busuu language learning) and Chegg Skilling, with management emphasizing workforce development and language learning as long-term growth priorities. Management has formally separated operations into a growth-focused Chegg Skilling business and a cash-generative Legacy Academic Services segment, signaling a structural pivot rather than a cyclical adjustment.

Financial Highlights Q2 2025

- Revenue: $105.1 million vs. $163.1 million (Q2 2024) (–36% YoY)

- Adjusted EBITDA: $23.1 million vs. $44.1 million (Q2 2024) (–47% YoY; margin 22% vs. 27%)
- Capital expenditures: $7.0 million vs. $17.8 million (Q2 2024) (–60% YoY)
- Free cash flow: $(12.0) million vs. $(3.6) million (Q2 2024)
- Subscription Services subscribers: 2.6 million (down ~40% YoY)

Chegg's primary strategic adjustment is its increased emphasis on skilling and language learning. Management indicated year-over-year growth in Chegg Skilling and reiterated expectations for continued expansion in 2026, positioning the segment as a longer-term focus area. The company is expanding AI-enabled upskilling programs across data, AI fundamentals, technical fluency, and professional development while growing B2B distribution partnerships to diversify beyond direct-to-student subscriptions.

Management has emphasized cost discipline, selective product investment, and marketing efficiency to align spending with seasonal demand and return on investment. Capital expenditures have been meaningfully reduced through AI-driven infrastructure efficiencies, and restructuring efforts are intended to stabilize margins during the transition.

Outlook

Chegg's near-term outlook reflects continued pressure in its core academic subscription business. Management has guided the following expectations for Q3 2025:

Table 3. Chegg Q3 FY 2025 Guidance

Metric	Q3 2025 Guidance
Total Revenue	$75–$77 million
Subscription Services Revenue	$67–$69 million
Adjusted EBITDA	$7–$8 million

Source: Chegg

The guidance indicates continued near-term revenue pressure. Management's stated strategy is to offset contraction in academic subscriptions with growth in workforce-aligned credentials and enterprise partnerships. The timing and magnitude of that offset remain uncertain, and consolidated stabilization will depend on the relative pace of skilling expansion versus academic declines.

Wiley (Hoboken, NJ)

Wiley, a global scholarly publishing and research intelligence company, reported Fiscal Q2 2026 results for the period ended October 31, 2025. While narrowing revenue guidance due to Learning softness, management reaffirmed full-year margin, earnings, and cash flow expectations.

Wiley operates across Research, Learning, and Corporate functions. Research remains the company's primary growth and margin driver, supported by institutional subscriptions, journal licensing, and expanding AI-related partnerships.

Financial Highlights Q2 FY 2026:

- GAAP revenue: $422 million vs. $427 million (including ~$3 million of foregone revenue from divested businesses)
- Adjusted revenue (constant currency): $422 million (–1%)
- Adjusted EBITDA (constant currency): $115 million (+8%); 27.3% margin (+240 bps)
- GAAP diluted EPS: $0.84 (+14%)
- Adjusted EPS (constant currency): $1.10 (+12%)

Research revenue was $279 million, up 6% as reported (5% constant currency), driven by growth in Research Publishing and AI-related revenue. Research adjusted EBITDA margin expanded to 33.5% from 31.3%.

Learning revenue was $143 million, down 11% as reported (and at constant currency), reflecting market-related softness and channel inventory dynamics. Print declines more than offset digital growth. Learning adjusted EBITDA margin was 40.1%, down from 41.3%.

Management continued emphasizing portfolio discipline and capital return. During the first half, the board approved a $250 million share repurchase authorization and deployed a 10b5-1 plan for repurchases outside open windows, while continuing its regular dividend program.

Outlook

Management reaffirmed margin and cash flow guidance while narrowing revenue expectations due to continued Learning softness. Growth is expected to be weighted toward Research momentum and operational efficiencies.

Table 4. Wiley FY 2026 Outlook

Metric	Fiscal 2026 Outlook
Adjusted Revenue	Low-single digit growth (narrowed to low end of prior range)
Adjusted EBITDA Margin	25.5%–26.5%
Adjusted EPS	$3.90–$4.35
Free Cash Flow	Approximately $200 million

Source: Wiley

Wiley's results reflect segment-level divergence. The Learning segment remains exposed to print and retail channel dynamics, while Research continues to benefit from institutional demand and AI-related licensing activity. Margin expansion is attributed to restructuring initiatives, technology investments, and operating efficiencies. In this case, AI-related activity is described as complementary to existing research workflows rather than substitutive.

Market Analysis and Strategic Implications

The contrast between Chegg and Wiley underscores how AI is redistributing economic value across the education and publishing ecosystem.

First, AI substitution risk is concentrated in consumer-facing homework and study assistance categories, where generalized AI platforms can replicate core functionality. In these segments, differentiation requires either credential alignment, enterprise distribution, or proprietary content layers that extend beyond answer generation.

Second, institutional subscription models anchored in peer-reviewed research and licensing agreements demonstrate greater structural resilience. AI training partnerships and corporate knowledge feeds represent incremental monetization channels rather than displacement risk.

Third, capital discipline is emerging as a universal lever. Both companies are reducing CapEx, restructuring cost bases, and reallocating investment toward AI-enabled infrastructure. Margin preservation is increasingly dependent on operational execution rather than top-line acceleration.

The reporting period underscores differences in exposure to AI-driven behavioral change. Consumer-facing study assistance models face greater substitution risk, while institutional research publishers benefit from contractual renewals and proprietary content control. Capital discipline and portfolio focus are common responses across both companies. Longer-term outcomes will depend on the durability of institutional demand, the scalability of skilling initiatives, and the extent to which AI integration alters purchasing and subscription behavior.

EMA Stock Watch

EMA Stock Watch 2026: Daily Share Price Performance, February 16, 2026

Symbol	Last Price	Change (%)	Change	Currency	Market Time	Volume	Shares	Avg Vol (3M)	Day Range	52-Wk Range	Day Chart	Market Cap
^DJI	49,500.93	+0.10%	+48.93	USD	4:55PM EST	602.086M	Add	552.637M	49,084.35 – 49,743.98	36,611.78 – 50,512.79		--
BNED	7.70	+4.76%	+0.35	USD	4:00PM EST	370,116	Add	420,000	7.26 – 7.86	5.90 – 12.21		264.068M
BOXL	1.3300	-5.00%	-0.0700	USD	4:00PM EST	529,521	Add	5.993M	1.27 – 1.45	1.19 – 60.90		1.266M
CNGO	23.50	+13.25%	+2.75	USD	10:46AM EDT	6,300	Add	0	23.50 – 23.50	20.75 – 23.50		1.446B
CHGG	0.5637	+1.71%	+0.0095	USD	4:00PM EST	1.49M	Add	1.484M	0.55 – 0.59	0.44 – 1.90		62.563M
COUR	5.92	+2.25%	+0.13	USD	4:00PM EST	8.113M	Add	4.373M	5.66 – 5.96	5.47 – 13.56		994.019M
DTOL.TO	10.39	-2.44%	-0.26	CAD	4:00PM EST	29,473	Add	31,879	10.15 – 10.68	10.15 – 21.11		567.989M
DUOL	112.57	+0.46%	+0.52	USD	4:00PM EST	1.914M	Add	2.018M	110.19 – 115.99	107.16 – 544.93		5.204B
GWOX	415.00	-1.19%	-5.00	USD	4:00PM EST	132	Add	62	415.00 – 415.01	390.01 – 460.00		193.435M
KLTR	1.4600	+2.82%	+0.0400	USD	4:00PM EST	167,458	Add	335,306	1.42 – 1.50	1.35 – 2.73		225.558M
NRDY	1.0000	-0.99%	-0.0100	USD	4:00PM EST	114,560	Add	1.197M	0.99 – 1.01	0.77 – 1.97		187.334M
PSO	12.56	+1.62%	+0.20	USD	4:00PM EST	1.198M	Add	953,177	12.36 – 12.56	12.02 – 17.90		7.95B
SCHL	34.09	+1.22%	+0.41	USD	4:00PM EST	313,439	Add	385,501	33.71 – 34.48	15.77 – 35.98		867.307M
SOFO	0.0001	0.00%	0.0000	USD	4:00PM EST	300	Add	1,355	0.00 – 0.00	0.00 – 0.01		1,213
LRN	84.89	+0.52%	+0.44	USD	4:00PM EST	543,944	Add	1.42M	83.00 – 85.31	60.61 – 171.17		3.723B
UDMY	4.7000	+1.73%	+0.0800	USD	4:00PM EST	2.263M	Add	2.81M	4.52 – 4.75	4.35 – 10.26		687.971M
WLY	29.44	+2.26%	+0.65	USD	4:00PM EST	443,066	Add	622,609	28.57 – 29.75	28.38 – 47.26		1.547B

Notes: Daily closing results for February 16, 2026 are indicated by the colored text next to the stock symbol in the chart. Key metrics include the latest price, percentage change, and volume, providing insights into the performance of education sector companies. This enhanced chart includes additional details such as daily and 52-week trading ranges for a comprehensive market overview. Companies listed: Dow Jones Industrial Average (DJI), Barnes and Nobel Education (BNED), Boxlight (BOXL), Cengage (CNGO), Chegg (CHGG), Coursera (COUR), D2L (DTOL.TO), Duolingo (DUOL), Goodheart-Willcox (GWOX), Kaltura (KLTR), Nerdy (NRDY), Pearson (PSO), Scholastic (SCHL), Sonic Foundry (SOFO), Stride (LRN), Udemy (UDMY), and Wiley (WLY)

Source: Yahoo Finance

EMA Briefs

News

February 11, 2026 — **Silverchair** (Charlottesville, VA), a technology platform provider for scholarly publishers, launched *Discovery Bridge MCP*. The product connects hosted scholarly content with AI-powered research workflows and discovery tools. Silverchair stated that the initiative supports structured access to publisher content within AI-enabled research environments and enhances interoperability with emerging research systems.

February 11, 2026 — **Book Industry Study Group** (New York, NY) hosted a webinar examining tariffs and Title II implications for publishing. The session addressed regulatory developments, cost considerations, and supply chain factors discussed by industry participants, including potential effects on printing, distribution, and telecommunications-related services.

February 10, 2026 — **Lexia** (Boston, MA), a literacy curriculum and professional learning provider and brand of Cambium Learning Group, reported a nearly 19% increase in state departments acquiring or renewing Lexia Aspire and Lexia LETRS professional learning programs in 2025. Lexia Aspire provides IDA-accredited coursework for upper elementary through high school educators. LETRS is a multi-year professional learning program focused on structured literacy instruction for PreK–5 educators and administrators. The reported increase reflects state-level adoption and renewal activity during the 2025 calendar year.

February 10, 2026 — **LexisNexis** (New York, NY), a legal and regulatory information services provider, launched *Tolley+* with *Protégé* in the United States. The platform combines tax and regulatory intelligence with AI-assisted research functionality intended to support compliance, advisory, and analytical workflows for legal and tax professionals.

People

February 13, 2026 — **HarperCollins Publishers** (New York, NY) promoted **Liate Stehlik** to CEO of HarperCollins US Trade. Stehlik previously led the William Morrow Group and now oversees US trade operations.

February 12, 2026 — **SAE International** (Warrendale, PA) appointed **Dan Sweeney** as Chief Technology Officer. The company stated that Sweeney will oversee technology strategy and digital initiatives supporting standards development and member services.

February 10, 2026 — **Cashmere** (London, UK) appointed **Sue Hodgson** as Vice President of Strategic Partnerships. The company indicated that the appointment supports expansion of publishing relationships and AI licensing negotiations within its platform operations.

Partnerships & Acquisitions

February 12, 2026 — **Babson College** (Wellesley, MA), a private business school focused on entrepreneurship education, announced the launch of an AI & Innovation Certificate within its Professional & Executive Education portfolio in collaboration with **Founderz** (Barcelona, Spain), an applied AI training provider. The credential includes four digital badges and one certificate combining entrepreneurial leadership frameworks with applied artificial intelligence instruction. Courses are self-paced and designed for working professionals seeking practical AI fluency in business contexts. Instruction is delivered with Founderz, with academic oversight from Babson faculty. The addition formally incorporates applied AI coursework into Babson's executive education offerings.

February 12, 2026 — **Thomson Reuters** (Toronto, Canada) acquired **Noetica**, an AI-native corporate transaction intelligence platform. The acquisition expands transaction intelligence capabilities within Thomson Reuters' legal technology portfolio and adds AI-enabled analysis tools for corporate transaction workflows.

February 11, 2026 — **ClassDojo** (San Francisco, CA), a K-12 communication platform, partnered with **Canva Education** (Sydney, Australia) to integrate design tools into school communication workflows. Educators can access Canva within ClassDojo and publish visual content directly to classroom and school Stories. The initial rollout focuses on educator workflows, with district-level functionality planned. The collaboration streamlines content creation within established communication channels.

February 11, 2026 — **Udemy** (San Francisco, CA), an online learning marketplace, partnered with **OpenAI** to integrate personalized learning experiences into ChatGPT. Users can access curated Udemy course pathways through a conversational interface, connecting structured course catalogs with AI-driven discovery and recommendation tools.

February 11, 2026 — **Clear Skies** (London, UK) and **IEEE** (New York, NY) announced a 1,000,000-article screening partnership. The agreement applies AI-based screening tools to scholarly review processes across a large corpus of research articles. The companies describe the initiative as supporting research integrity and publication workflow quality control.

February 10, 2026 — **ResearchGate** (Berlin, Germany), a scholarly networking platform, expanded its Journal Home partnership with **Pensoft Publishers** (Sofia, Bulgaria). The partnership broadens journal distribution within ResearchGate's platform and extends content visibility through the Journal Home framework.

Further Information

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