

2025 in Education

Where the Market Moved

A visual recap of 2025's biggest K-12 shifts—enrollment, spending, funding, and workforce.



2025 EDU Market Insights Recap

This recap lays out a visual "year in review." It shows where the K-12 market is headed—and how vendors could respond.

This year's data reflects what schools have been living through: an education landscape jolted off its stable course, lurching forward in sudden, uneven bursts as policy upheavals and funding shocks collide. Agile's **2025 Education Market Insights Recap** distills millions of data points into a simple set of maps and charts your team can actually use.

Use this recap to answer questions such as:

- Where is enrollment shrinking—and where are charter and private segments still expanding?
- Which states have the strongest spending per student to support premium or innovative solutions?
- Where are newly released federal funds likely to fuel new initiatives in professional learning, programs for multilingual learners, student support, and enrichment?
- Which districts and schools are navigating leadership changes—and may be more open to new partners and solutions?

What's Inside the Recap



1. Enrollment Dynamics

National enrollment has crept down, but charter and private school enrollment has climbed, revealing new pockets of opportunity across states and school types.



2. Spending Signals + Staffing Trends

Per-student K-12 spending maps show where budgets can support comprehensive offerings and where ROI-focused solutions will resonate most. Leadership turnover trends impact spend decision making.



3. Funding Momentum

Federal Title II-A, III-A, IV-A, and IV-B funding releases set the stage for investments in professional learning, student support, enrichment, and library programs.



Share this recap with your product, marketing, and sales leaders to align your 2025–26 strategy.

1. Enrollment Dynamics: Where Students Are Moving

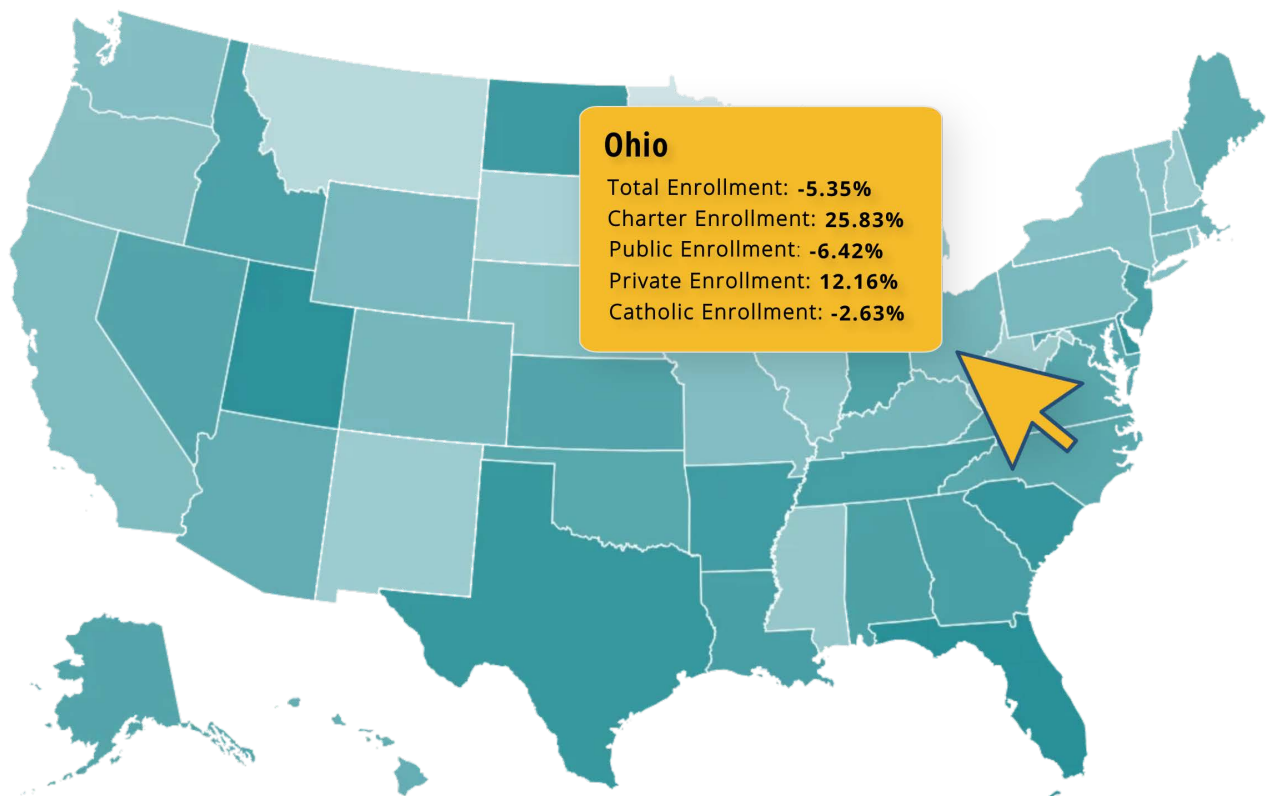
The Big Picture

National enrollment has edged down, but charter and private school enrollment has climbed, revealing new pockets of opportunity across states and school types.

What This Means

Understanding where enrollment is shrinking and where alternative school segments are expanding helps you target the right markets with the right solutions.

- ❏ **Data Source:** 5-Year Enrollment Shifts Map tracks enrollment changes across traditional public, charter, and private schools nationwide.



[See 5-Year Enrollment Shifts Map](#)

2. Spending Signals: Budget Capacity by State

K-12 per-student spending maps show where budgets can support comprehensive offerings and where ROI-focused solutions will resonate most.

\$12K+

High-capacity states

Districts with strong per-student spending can support premium or innovative solutions

\$6K-\$9K

Mid-range markets

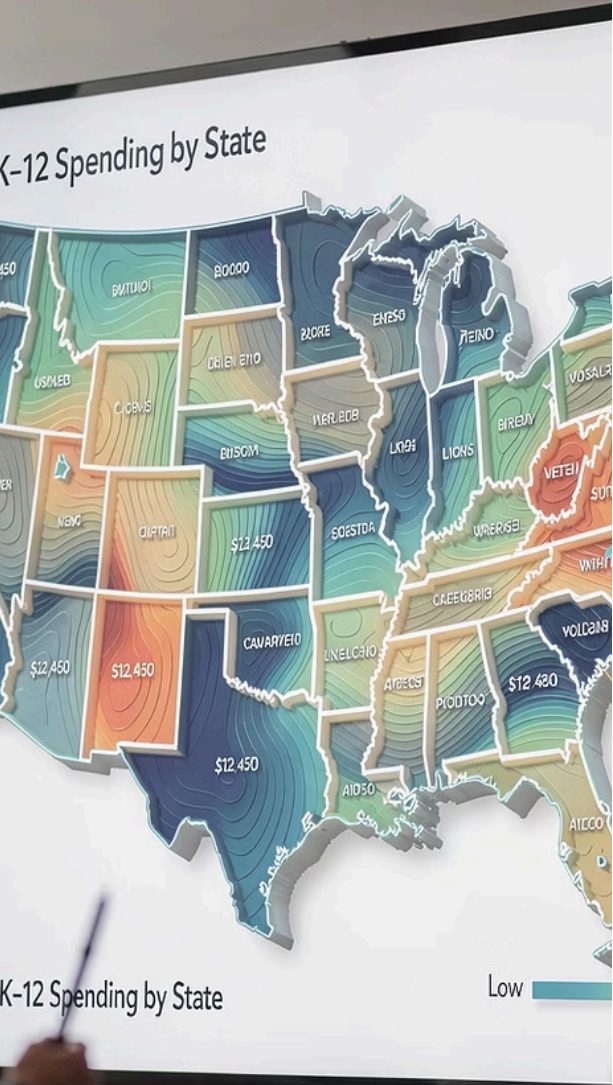
Balanced approach needed between features and affordability

<\$6K

ROI-focused regions

Clear value proposition and cost-effectiveness are critical

[View Spending Map](#)



K-12 Spending by State

Low





3. Funding Momentum, Disrupted

Federal dollars still set the stage for investments in professional learning, student support, enrichment, and extended learning—but the 2025 withholding turned what was once a reliable stream into a source of anxiety. District and school leaders had to ask not just “how much?”, but also “when, and can we count on it?”

How the Delay Reshaped District Behavior

When funds did not arrive on the expected timeline, districts responded with caution that rippled across the market. As a result:

Hiring slowed or paused

Many systems froze or delayed hiring for instructional, support, and enrichment roles until they had written confirmation that funds would be released, stretching existing staff and postponing planned program expansions

Programs were downsized or temporarily shut down

After-school, enrichment, and professional learning initiatives were scaled back, postponed, or mothballed altogether rather than risk building commitments on uncertain dollars.

- **Purchasing shifted to “must-have only”**

Districts prioritized renewals and core services, pushing back new pilots, add-ons, and “nice-to-have” tools—even those tied to long-term strategic goals.

- **Planning horizons got shorter**

Multi-year roadmaps gave way to short and reactive planning windows, as budget leaders waited for each new funding signal before committing to larger initiatives.

📌 This new pattern carries into 2026 planning, with more cautious forecasting and a stronger bias toward flexibility.

[View Federal Funding Released Map](#)

What This Means for Vendors

The 2025 disruption did not just affect districts; it fundamentally changed how vendors need to approach the market. In this environment:

Timing + Proof of Funding Matter More

Outreach that acknowledges recent uncertainty and aligns to verified funding releases will be more credible than generic “new funds are available” messaging.

Flexible Offers Become a Differentiator

Phased implementations, pilot-to-scale models, and contract structures that allow districts to start small and expand as funds solidify are far more attractive than rigid, all-at-once commitments.

Support for Continuity is a Selling Point

Solutions that help districts sustain or restart paused programs—especially in professional learning, student support, and enrichment—can position vendors as partners in stability, not just new spending.

Market Intelligence is a Key Advantage

Knowing which states and districts have confirmed releases, where hiring is resuming, and where program restarts are planned helps vendors invest limited sales and marketing resources where they are most likely to convert.



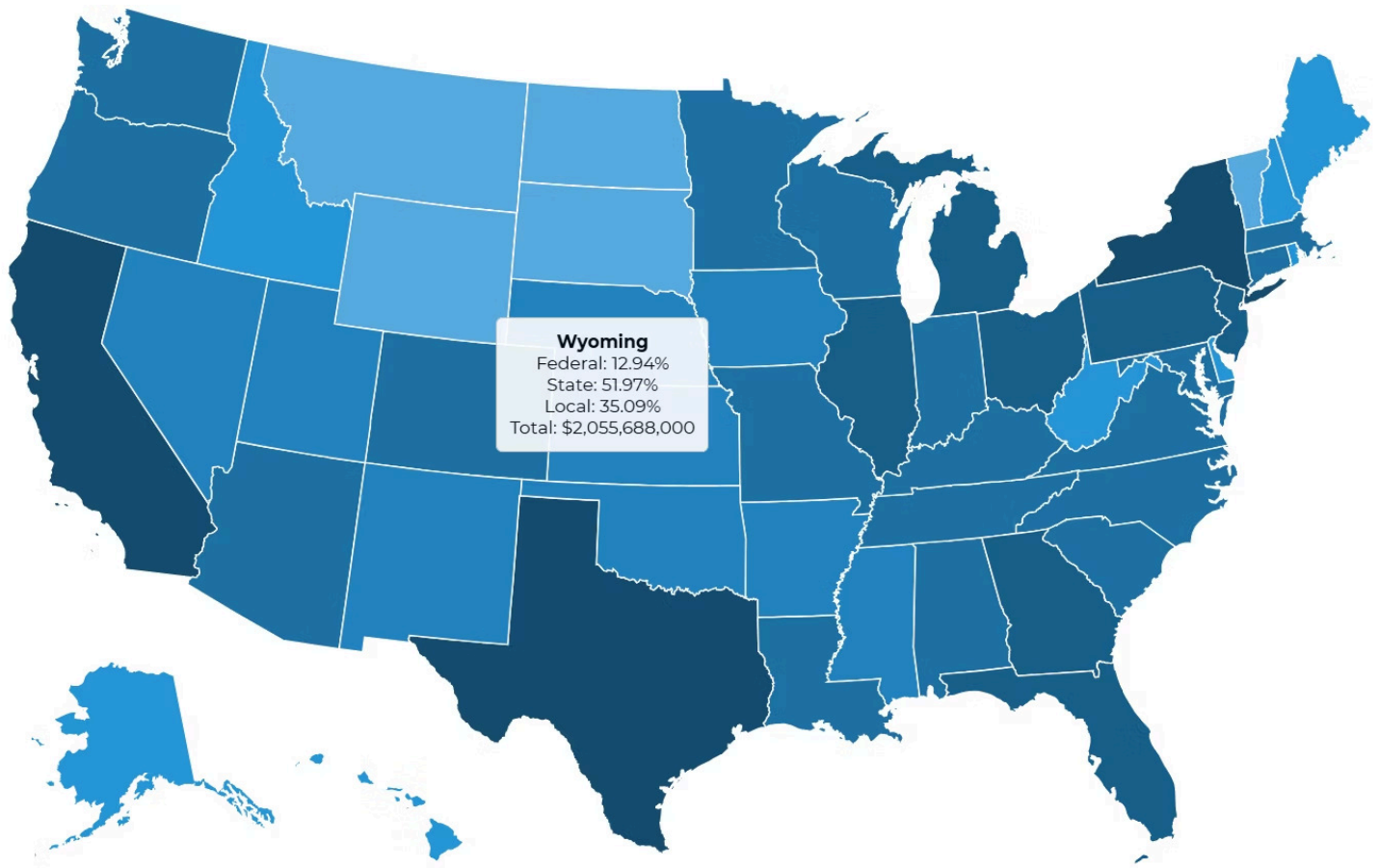
Moving Forward in an Era of Uncertainty

The temporary withholding may be behind us, but its effects linger in more cautious district behavior, shorter planning cycles, and an expectation that funding can shift quickly. For vendors, success now depends on pairing compelling solutions with agility—meeting districts where they are, when they have both the dollars and the confidence to move.

The Broader Funding Context

Though it dominated much focus in 2025, federal education funding is still only part of how U.S. public education is subsidized. The impact of continuing uncertainty at the federal level looks very different for each individual state.

Agile's Federal, State + Local Funding Map shows how K-12 funding flows into each state, combining federal, state, and local sources to reveal the overall size of the education pie.



[View Federal, State + Local Funding Map](#)

Leadership and Workforce Intelligence

Superintendent Turnover

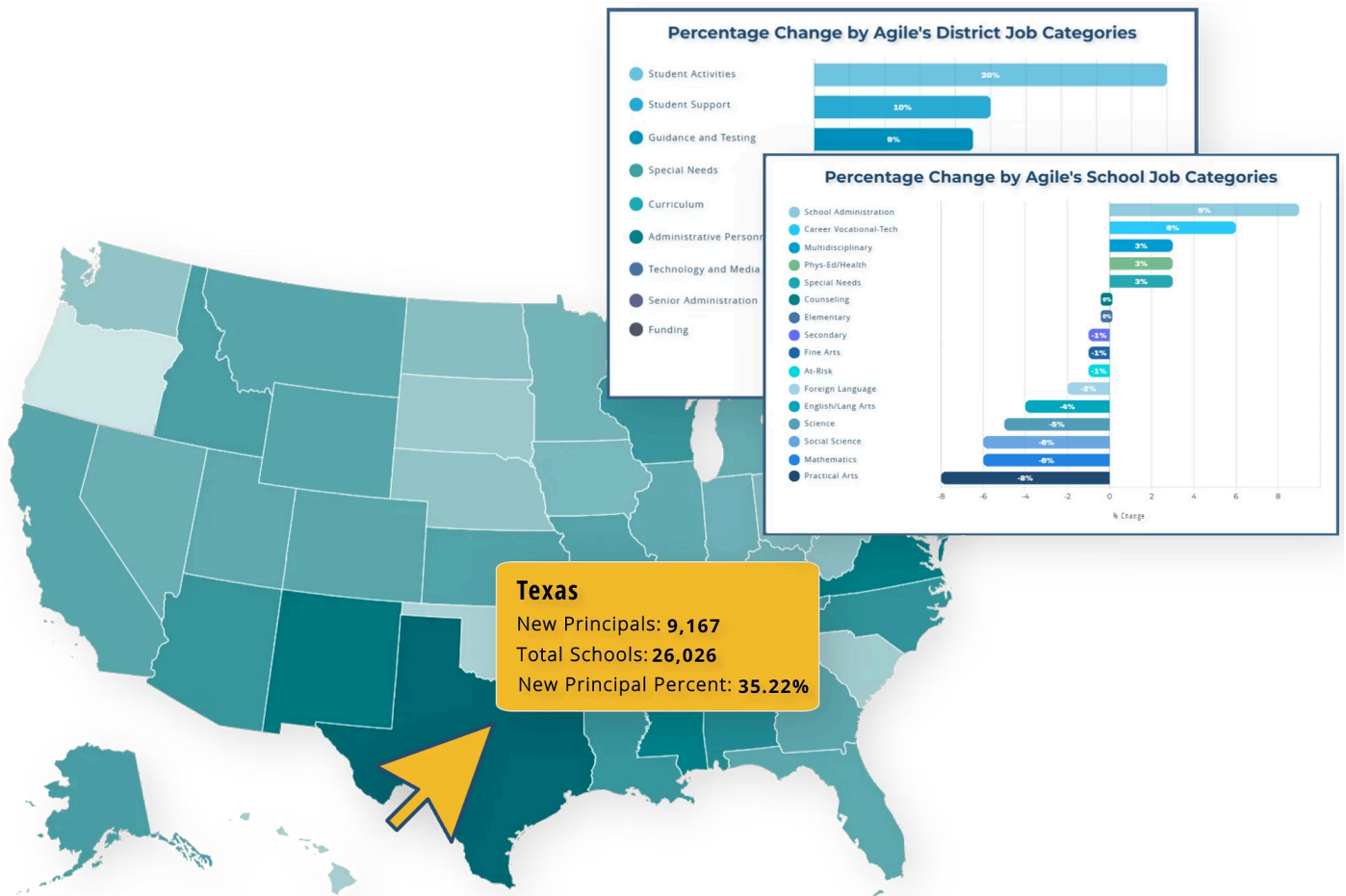
With thousands of new superintendents appointed over a single year and turnover across nearly one in four districts, decision-making tables are changing.

Principal Transitions

More than one in five public schools welcomed a new principal between late 2024 and late 2025, with some states experiencing much higher rates.

Workforce Evolution

Growth in student support, career and technical education (CTE), student activities, and specialized services—alongside shifts in classroom teaching roles—highlights where districts are investing staff capacity.

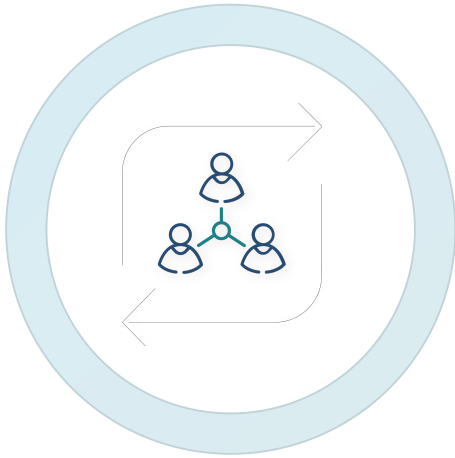


[See Workforce Trends](#)

[See New Leadership Map](#)

New Superintendents: Decision-Makers in Transition

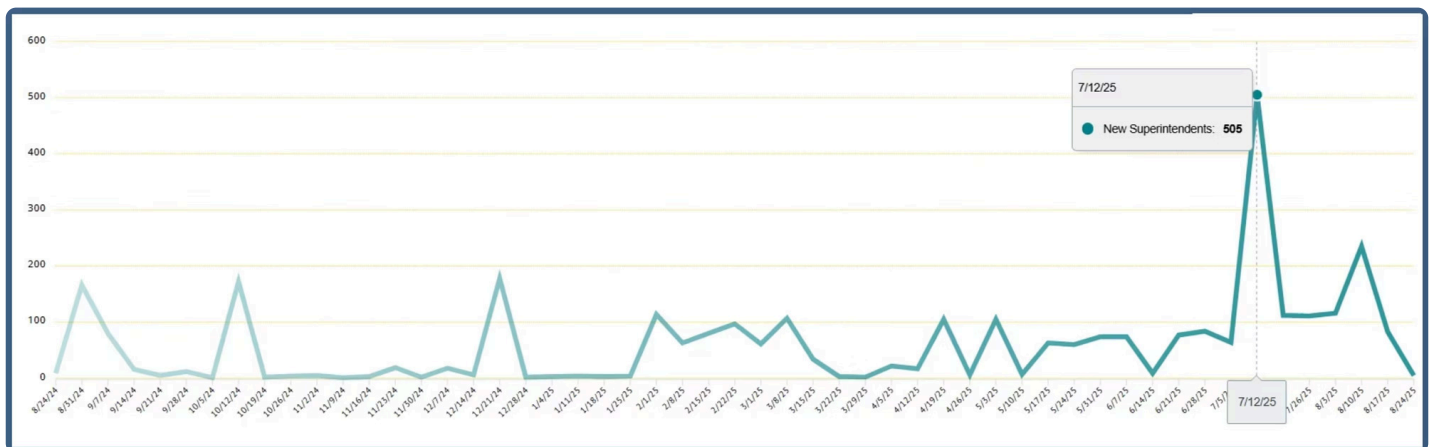
With thousands of new superintendents appointed over a single year and turnover across nearly one in four districts, decision-making tables are changing.



One in four districts experienced superintendent turnover in a single year.

New leaders bring fresh priorities and openness to new partnerships.

Opportunity Window: New superintendents are establishing priorities and building vendor relationships—making this an ideal time to introduce your solutions.



[See New Superintendents Chart](#)

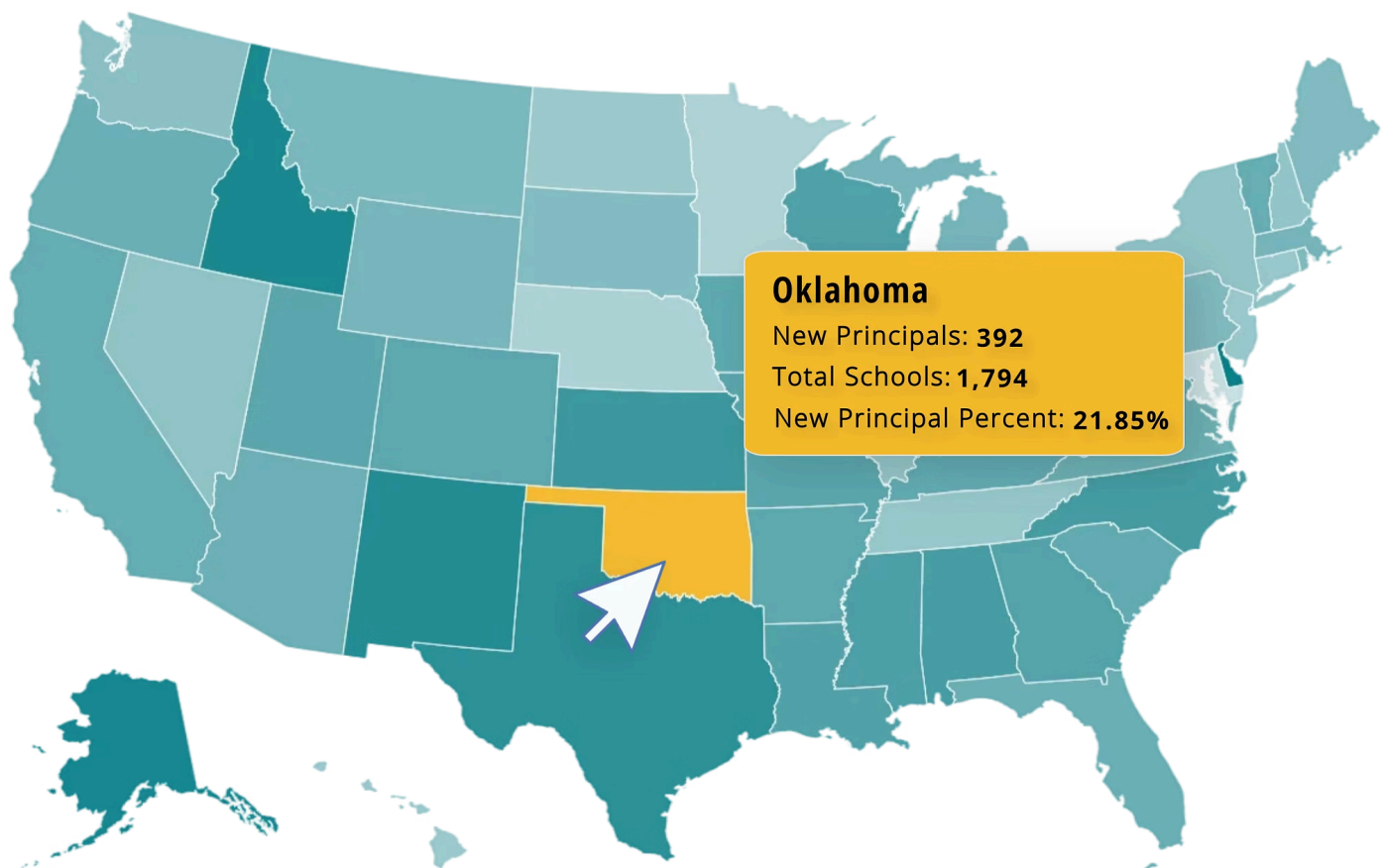
[See New Superintendents Map](#)

Principal Transitions: Building-Level Change

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- ❑ **Field Intelligence:** Equip your sales teams with principal transition data to identify schools where new leadership may be evaluating current programs and seeking fresh solutions.



[See New Principals Map](#)



Why Agile Data Matters

With Agile, you move beyond static reports to data you can act on:



Ready to build your data-informed strategy?

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