E-learning Market - Global Outlook & Forecast 2023-2028

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Report description:

The global e-learning market is expected to grow at a CAGR of 13.28% from 2022 to 2028.

MARKET TRENDS & DRIVERS

Increasing Use of Mobile Applications in the E-learning Market

Development in mobile applications is becoming the core strategy of most businesses where older education models are being replaced with revolutionary E-learning applications that have changed the learning process. Mobile applications have introduced several features to offer ease and convenience to overcome various problems faced by students from different demographics and geographical backgrounds. With the help of mobile phones, learning has now become more interactive. The emergence of smartphones in the late 20th century changed the learning scenario.

Increasing Demand for Internet-Enabled Services

Growing internet, mobile, and smartphone penetration is one of the fundamental growth drivers of the e-learning market. This has revolutionized content delivery mode and evolved the method by continuously improving bandwidths and reducing data prices. Governments across the globe hold the key to developing internet infrastructure across countries and formulating the framework for E-learning as the primary and secondary mode for mass education. Primary and secondary education is predominantly funded and regulated by the state and constitutes a key end-user segment in the e-learning market.

Introduction of 5G Technology

The emergence of 5G technology is expected to witness heights by 2023, covering nearly 20% of the global population. The application of 5G will be similar to 4G but more reliable and faster. The bandwidth of connecting to more devices and executing tasks at greater speed without delay will have a huge influence on the e-learning market. The ability to connect more than a million devices per square km will bring out hassle-free advancements in smart classes, cloud technology, and gamification, thereby improving the adoption of a tech-based learning ecosystem. Adopting 5G technology in education has brought huge transformations in a high-quality learning experience with high video and audio quality and a seamless VR experience. The concept of adopting 5G technology is at a nascent stage. It is expected to grow as many companies as possible in the e-learning market are expected to start developing applications compatible with 5G technology.

INDUSTRY RESTRAINTS

Inadequate Internet Bandwidth in Developing Countries

For economic and human development, broadband internet access is necessary in developing and developed countries. For delivering essential services such as education and healthcare, the internet is a powerful tool that provides increased opportunities for environmental sustainability and adds to improved government transparency and accountability.
While developed markets such as the U.S., the U.K., and the EU account for the majority demand for online learning solutions, developing countries are the major growth markets because of their rapidly evolving internet and mobile infrastructure. Despite the rise in mobile and internet penetration in these countries, bandwidth and streaming quality are major concerns, often limiting access to sophisticated and advanced learning and training applications. With blended learning gaining foreground and video becoming an integral part of the training-learning curriculum, the role of internet bandwidth becomes even more prominent. The adoption of E-learning products in most emerging economies is largely affected by insufficient bandwidth, hindering the delivery of audio and video content and hampering the e-learning market growth.

SEGMENTATION INSIGHTS

INSIGHTS BY DELIVERY MODE

E-learning encompasses various courseware and content delivery services for various end-user applications. Packaged content, LMS, and other emerging learning avenues, including serious games and gamified mobile applications, are the most prominent. Other important learning models increasingly gaining prominence include video-based learning, virtual classrooms, social learning, gamification, and simulations. Of all these, gamification and virtual classrooms stand out in the global e-learning market due to their high engagement level and perceived effectiveness.

Segmentation by Delivery Mode
- Packaged Content
- LMS
- Others

INSIGHTS BY LEARNING MODE

The global e-learning market by learning mode is categorized under self-paced and instructor-led. The self-paced learning mode is a preferred choice of learners as it allows them to learn at their schedule and time. Also, the method enables learners to control the amount of study material and time required. In 2022, the self-paced learning mode segment dominated the global industry. The segment is expected to grow at a comparatively higher CAGR than the instructor-led learning mode segment during the forecast period. Under the instructor-led learning mode, the course already has a pre-planned pace, which cannot be altered as per convenience.

Segmentation by Learning Mode
- Self-paced

- Instructor-led

INSIGHTS BY FUNCTION MODE

The training function facilitates the learners with lectures (live or recorded) along with necessary notes or other relevant content. In 2022, the global e-learning market was dominated by training functions. Training module packages include notes in PDF, video tutorials, word documents, and assessments to help students learn easier and quicker. Further, testing plays a vital role in measuring the grasping capacity of a learner. It also certifies how well a student has learned a particular subject or course.

Segmentation by Function Type
- Training
- Testing

INSIGHTS BY END USERS

The global e-learning market by end users is divided into five categories K-12, higher education, corporate, government, and vocational. E-learning is used by corporates to train, communicate, and enhance the value of employees across organizations. They are constantly looking to increase the effectiveness and efficiency of their workforce, and there is a constant requirement to upskill the existing personnel. Due to such factors, the corporate segment is projected to have the highest industry share in 2028. Furthermore, the rising internet penetration and awareness have enabled people to explore and pursue various interests or areas to make a career switch or gain knowledge. Hence vocational courses are in demand in the e-learning market and are expected to rise further in the forecasted period.

Segmentation by End-user
- Corporate
- Higher Education
- K-12
- Government
- Vocational

GEOGRAPHICAL ANALYSIS

North America emerged as the largest e-learning market, accounting for the highest revenue share of over 41% in 2022, owing to efficient learning infrastructure and the development of innovative learning methodologies. High-speed internet, strong connectivity, and easy access allow attendees to provide useful real-time feedback, allowing improvements in interactive E-learning sessions. The surge in the adoption of 5G technology to improve the learning experience is expected to drive market growth. The U.S. and Canada are North America's two most prominent countries, as it hosts the world's highly advanced and largest economies.

Segmentation by Geography
- North America
  - The U.S.
  - Canada
- APAC
  - China
  - South Korea
  - Japan

o Australia
o India
o Singapore
o Indonesia
o Malaysia
o Thailand
o Philippines
- Europe
o The U.K.
o Germany
o France
o Nordic
o Spain
o Italy
o Russia
o Benelux
- Latin America
o Brazil
o Mexico
o Argentina
o Chile
o Colombia
o Peru
- Middle East & Africa
o GCC
o South Africa
o Turkey
o Egypt
o Israel
o Kenya

COMPETITIVE LANDSCAPE

Academic and business end users have distinct expectations, learning requirements, and marginal utilities for services supplied. While academic courseware should include highly configurable platforms that allow instructors to change content dynamically, corporate courseware often includes a set of courseware and content structure distributed online to a bigger audience regularly. Distinct forms of learning need different marketing and operational resources; thus, medium-sized providers should concentrate on only a few. Over the previous seven years, the Latin American e-learning market has seen significant mergers and acquisitions. Several companies that began focusing on one or two segments, such as K12 or secondary education, have expanded their offerings and portfolios by acquiring smaller start-ups in distance learning, on-campus post-secondary education, and corporate or government workforce skill training.

Key Company Profiles

- Apollo Education Group
- Blackboard
- British Council

-Oracle
-Pearson
-Aptara
-Adobe
-Skillsoft
-NIIT

Other Prominent Vendors

-Cisco
-Instructure
-GP Strategies
-Thomson Reuters
-Docebo
-McGraw Hill
-Desire2Learn
-Edmodo
-Cengage
-Macmillan Education
-Cornerstone
-Educomp
-Cogna Educacao
-Telefonica
-edX
-Estacio
-Coursera
-SAP Litmos
-Open Education
-Veduca
-LinkedIn (Microsoft)
-Simplilearn
-Think & Learn (BYJU?S)
-upGrad
-LeQuest
-FutureLearn
-L2P (Learn 2 Play)
-Chegg
-Bright Little Labs
-Aula Education
-WhiteHat Security
-Blinkist
-Age of Learning
-Learnetic
-Elearn Australia
-360Learning
-Udemy
-Skillshare

- Udacity
- Pluralsight
- Alison
- Babbel
- Treehouse
- Unacademy
- Duolingo
- Tracxn Technologies
- IGNOU
- BenchPrep
- Coassemble
- Codecademy
- CrossKnowledge
- FutureLearn
- GoSkills
- iHASCO
- ITPro
- Khan Academy
- MasterClass
- OpenSesame
- Rosetta Stone
- Teachlr
- DataCamp
- BrainStation
- Cengage Learning India
- Estacio
- Telefonica Learning Services
- Learnetic

KEY QUESTIONS ANSWERED:

1. How big is the e-learning market?
2. What is the growth rate of the global e-learning market?
3. What are the growing trends in the e-learning market?
4. Which region holds the most significant global e-learning market share?
5. Who are the key players in the global e-learning market?

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