

Smart Learning Market by Offering (Hardware, Solutions (Integrated Solutions and Standalone Solutions), and Services), Learning Type (Synchronous Learning and Asynchronous Learning), End User and Region - Global Forecast to 2029

Market Report | 2024-05-20 | 308 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The smart learning market is estimated to be USD 67.1 billion to USD 155.2 billion at a CAGR of 18.3% from 2024 to 2029. The availability of high-quality digital content, including e-books, video lectures, and interactive modules, significantly enhances the learning experience. Cloud-based Learning Management Systems (LMS) and Learning Content Management Systems (LCMS) streamline the creation, delivery, and management of educational content, making it more accessible to students and educators. These systems ensure that educational institutions can provide top-notch resources and support to their learners driving the adoption of smart learning market.

"The interactive whiteboards segment is projected to register the highest CAGR during the forecast period."

Interactive whiteboards help users interact with the image being projected on the screen with the help of interactive projectors. Users can actively interact with the projected image by drawing on the interactive whiteboard with a pen or marker or even from their device. Any changes to the image are saved as the projector can sense where the pen moves. These features help keep the audience engaged, especially in an academic end-user segment, as it offers multi-touch facilities where children can be given group projects to work on. In the enterprise segment, it is used for presentation and does not restrict the presenter to a specific meeting room. It is easy for the presenter to write on the content displayed on the screen to make the presentation more informative. Some prominent vendors of interactive projectors are Hitachi, BenQ, Seiko, Optoma Technology, and Touchjet. The integrated solution segment contributed the largest market share in the smart learning market during the forecast period. An integrated solution refers to a combination of two or more standalone solutions. Typically, large vendors provide platforms with the flexibility to add or eliminate solutions. These solutions are expensive but more convenient to scale up with the growth of an organization. Integrated solutions offer the convenience of scaling up and smooth communication over standalone solutions. They are preferred over standalone solutions because they provide scalability, smoother integration with other solutions, and better

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

connectivity. Integrating solutions enables seamless interaction between teachers, students, and administrators by providing a holistic approach to education technology. Integrated solutions are gaining traction due to their ability to streamline workflows, improve collaboration, and enhance learning outcomes in educational institutions and corporate training environments. Some prominent integrated solutions players are Microsoft, IBM, Samsung, Oracle, Huawei, Google, Blackboard, Adobe, Cornerstone OnDemand, and D2L.

"Asia Pacific will register the highest growth rate during the forecast period."

The Asia Pacific region is set to undergo significant growth opportunities in the coming years, with countries like India, China, Australia, and New Zealand expected to experience high growth rates. The region's vibrant education sector witnesses a rising preference for distance education and eLearning, fueled by the introduction of smart classrooms. As the largest student population hub, Asia Pacific experiences a surging demand for eLearning and distance education, stimulating the smart learning market's expansion. Educational institutions across the region prioritize the implementation of digital solutions and the adoption of smart devices to create more engaging learning experiences for students, fostering long-term information retention. Overall, Asia Pacific presents a promising landscape for smart learning solution providers to thrive and innovate.

Breakdown of primaries

The study contains insights from various industry experts, from solution vendors to Tier 1 companies. The break-up of the primaries is as follows:

-□By Company Type: Tier 1 - 30%, Tier 2 - 45%, and Tier 3 - 25%

-□By Designation: C-level -35%, D-level - 30%, and Managers - 35%

-□By Region: North America - 40%, Europe - 20%, Asia Pacific - 30%, Middle East & Africa- 5%, and Latin America- 5%.

The major players in the smart learning market are IBM (US), Samsung (South Korea), Adobe (US), Anthology (US), SMART Technologies (Canada), Oracle (US), SAP (Germany), Microsoft (US), Cornerstone OnDemand (US), Pearson (UK), BenQ (Taiwan), Google (US), McGraw Hill (US), Cisco (US), Huawei (China), D2L (Canada), Ellucian (US), Alphabet (Alphabet Inc), Upside LMS, Edsys (India), echo360 (US), Knowledge Anywhere (US), Instructure (US), SkyPrep (Canada), Paradiso Solutions (US), and Latitude CG (US). These players have adopted various growth strategies, such as partnerships, agreements and collaborations, new product launches, product enhancements, and acquisitions to expand their smart learning footprint.

Research Coverage

The market study covers the smart learning market size across different segments. It aims to estimate the market size and the growth potential across various segments, including offering, hardware, solutions, and services, learning type, end user, and regions. The study includes an in-depth competitive analysis of the leading market players, their company profiles, key observations related to product and business offerings, recent developments, and market strategies.

Key Benefits of Buying the Report

The report will help the market leaders/new entrants with information on the closest approximations of the global smart learning market's revenue numbers and subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. Moreover, the report will provide insights for stakeholders to understand the market's pulse and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (growing demand for LMS software to effectively manage learning content, gamification in EdTech, AI emerging as a critical tool to enhance learner engagement, enterprises focusing more on human capital development, and rising enrolments in higher education sector.), restraints (High cost of infrastructure, and Infrastructure limitations), opportunities (Transnational education, and advancements in smart learning technologies) and challenges (Need of technical training for teachers and instructors, data security and privacy issues) influencing the growth of the smart learning market. Product

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Development/Innovation: Detailed insights on upcoming technologies, research and development activities, and new product and service launches in the smart learning market. Market Development: Comprehensive information about lucrative markets - the report analyses various regions' smart learning markets. Market Diversification: Exhaustive information about new products and services, untapped geographies, recent developments, and investments in the smart learning market. Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like IBM (US), Samsung (South Korea), Adobe (US), Anthology (US), SMART Technologies (Canada), Oracle (US), SAP (Germany), Microsoft (US), Cornerstone OnDemand (US), Pearson (UK), BenQ (Taiwan), Google (US), McGraw Hill (US), Cisco (US), Huawei (China), D2L (Canada), Ellucian (US).

Table of Contents:

1 INTRODUCTION 50

1.1 STUDY OBJECTIVES 50

1.2 MARKET DEFINITION 50

1.3 MARKET SCOPE 50

1.3.1 MARKET SEGMENTATION 51

FIGURE 1 SMART LEARNING MARKET SEGMENTATION 51

1.3.2 GEOGRAPHIC SCOPE 52

FIGURE 2 SMART LEARNING MARKET: GEOGRAPHIC SCOPE 52

1.3.3 INCLUSIONS AND EXCLUSIONS 52

1.3.4 YEARS CONSIDERED 53

1.4 CURRENCY CONSIDERED 53

TABLE 1 USD EXCHANGE RATES, 2021-2023 53

1.5 STAKEHOLDERS 54

1.6 SUMMARY OF CHANGES 54

1.6.1 IMPACT OF RECESSION 54

2 RESEARCH METHODOLOGY 55

2.1 RESEARCH DATA 55

FIGURE 3 SMART LEARNING MARKET: RESEARCH DESIGN 55

2.1.1 SECONDARY DATA 56

2.1.1.1 Secondary sources 56

2.1.2 PRIMARY DATA 56

2.1.2.1 Breakup of primary profiles 57

FIGURE 4 BREAKUP OF PROFILES OF PRIMARY PARTICIPANTS BY COMPANY TYPE, DESIGNATION, AND REGION 57

2.1.2.2 Key industry insights 57

2.2 MARKET SIZE ESTIMATION 58

2.2.1 TOP-DOWN APPROACH 58

2.2.2 BOTTOM-UP APPROACH 58

FIGURE 5 RESEARCH METHODOLOGY: APPROACH 1 (SUPPLY-SIDE ANALYSIS) - REVENUE OF HARDWARE, SOLUTIONS, AND SERVICES OF SMART LEARNING MARKET 59

FIGURE 6 MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 2 (SUPPLY SIDE) - SMART LEARNING MARKET 60

2.3 DATA TRIANGULATION 60

FIGURE 7 DATA TRIANGULATION 61

2.4 RISK ASSESSMENT 62

TABLE 2 RISK ASSESSMENT 62

2.5 ASSUMPTIONS 62

TABLE 3 RESEARCH ASSUMPTIONS 62

2.6 LIMITATIONS 63

| | | |
|-----------|--|----|
| 2.7 | IMPLICATION OF RECESSION ON SMART LEARNING MARKET | 63 |
| 3 | EXECUTIVE SUMMARY | 64 |
| FIGURE 8 | SMART LEARNING MARKET, 2022-2029 (USD MILLION) | 64 |
| FIGURE 9 | LEADING MARKET SEGMENTS IN SMART LEARNING MARKET | 65 |
| FIGURE 10 | SMART LEARNING MARKET: REGIONAL SNAPSHOT | 66 |
| 4 | PREMIUM INSIGHTS | 67 |
| 4.1 | ATTRACTIVE OPPORTUNITIES IN SMART LEARNING MARKET | 67 |
| FIGURE 11 | GROWING DEMAND FOR PERSONALIZED AND INTERACTIVE LEARNING TO DRIVE MARKET | 67 |
| 4.2 | SMART LEARNING MARKET SHARE, BY OFFERING, 2024 | 67 |
| FIGURE 12 | HARDWARE SEGMENT TO DOMINATE MARKET IN 2024 | 67 |
| 4.3 | SMART LEARNING MARKET SHARE, BY STANDALONE SOLUTION, 2024 | 68 |
| FIGURE 13 | LMS/LCMS SOLUTION TO DOMINATE MARKET IN 2024 | 68 |
| 4.4 | SMART LEARNING MARKET SHARE, BY LEARNING TYPE, 2024 | 68 |
| FIGURE 14 | ASYNCHRONOUS LEARNING SEGMENT TO HOLD LARGER MARKET SHARE IN 2024 | 68 |
| 4.5 | SMART LEARNING MARKET SHARE, BY END USER, 2024 | 68 |
| FIGURE 15 | ACADEMIC SEGMENT TO HOLD LARGEST MARKET SHARE IN 2024 | 68 |
| 4.6 | NORTH AMERICA: SMART LEARNING MARKET, BY OFFERING AND COUNTRY (2024) | 69 |
| FIGURE 16 | HARDWARE SEGMENT TO ACCOUNT FOR LARGEST SHARE OF NORTH AMERICAN MARKET IN 2024 | 69 |
| 5 | MARKET OVERVIEW | 70 |
| 5.1 | INTRODUCTION | 70 |
| 5.2 | MARKET DYNAMICS | 70 |
| FIGURE 17 | SMART LEARNING MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES | 71 |
| 5.2.1 | DRIVERS | 71 |
| 5.2.1.1 | Gamification in EdTech | 71 |
| 5.2.1.2 | AI emerging as critical tool to enhance learner engagement | 72 |
| 5.2.1.3 | Growing demand for LMS software to effectively manage learning content | 72 |
| 5.2.1.4 | Enterprises focusing more on human capital development | 72 |
| 5.2.1.5 | Rising enrollments in higher education sector | 72 |
| 5.2.2 | RESTRAINTS | 73 |
| 5.2.2.1 | High cost of infrastructure | 73 |
| 5.2.2.2 | Infrastructure limitations | 73 |
| 5.2.3 | OPPORTUNITIES | 73 |
| 5.2.3.1 | Transnational education | 73 |
| 5.2.3.2 | Advancements in smart learning technologies | 73 |
| 5.2.4 | CHALLENGES | 74 |
| 5.2.4.1 | Need for technical training for teachers and instructors | 74 |
| 5.2.4.2 | Data security and privacy issues | 74 |
| 5.3 | INDUSTRY TRENDS | 74 |
| 5.3.1 | BRIEF HISTORY OF SMART LEARNING MARKET | 74 |
| FIGURE 18 | BRIEF HISTORY OF SMART LEARNING | 74 |
| 5.3.2 | ECOSYSTEM | 75 |
| FIGURE 19 | KEY PLAYERS IN SMART LEARNING MARKET ECOSYSTEM | 75 |
| TABLE 4 | SMART LEARNING MARKET: ECOSYSTEM | 76 |
| 5.3.3 | VALUE CHAIN ANALYSIS | 77 |
| FIGURE 20 | SMART LEARNING MARKET: VALUE CHAIN ANALYSIS | 77 |
| 5.4 | TECHNOLOGY ANALYSIS | 77 |
| 5.4.1 | KEY TECHNOLOGIES | 77 |

| | | |
|-----------|--|----|
| 5.4.1.1 | Artificial Intelligence | 77 |
| 5.4.1.2 | Learning Management System (LMS) | 77 |
| 5.4.1.3 | Cloud Computing | 78 |
| 5.4.2 | COMPLEMENTARY TECHNOLOGIES | 78 |
| 5.4.2.1 | Virtual Reality (VR) & Augmented Reality (AR) | 78 |
| 5.4.2.2 | Big Data & Learning Analytics | 78 |
| 5.4.2.3 | Blockchain | 78 |
| 5.4.3 | ADJACENT TECHNOLOGIES | 79 |
| 5.4.3.1 | Extended Reality (XR) | 79 |
| 5.4.3.2 | Internet of Things | 79 |
| 5.5 | CASE STUDY ANALYSIS | 79 |
| 5.5.1 | CASE STUDY 1: BLACKBOARD HELPED MNPS WITH TRANSITION TO SMART LEARNING | 79 |
| 5.5.2 | CASE STUDY 2: SMART TECHNOLOGIES HELPED BRENTWOOD SCHOOL WITH VIRTUAL CLASSES DURING PANDEMIC | 80 |
| 5.5.3 | CASE STUDY 3: ADOBE HELPED TO TRANSFORM ACCC INSURANCE COMPANY'S LEGACY CONTENT INTO INTERACTIVE COURSES | 80 |
| 5.5.4 | CASE STUDY 4: UPSIDE LMS HELPED DOHA BANK TO STRENGTHEN ITS HUMAN CAPITAL DEVELOPMENT | 81 |
| 5.5.5 | PARADISO SOLUTIONS HELPED CROMA AUTOMATE EMPLOYEE TRAINING FOR EXCEPTIONAL CUSTOMER SERVICE | 81 |
| 5.6 | REGULATORY LANDSCAPE | 81 |
| 5.6.1 | REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS | 81 |
| TABLE 5 | NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS | 82 |
| TABLE 6 | EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS | 82 |
| TABLE 7 | ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS | 83 |
| TABLE 8 | ROW: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS | 83 |
| 5.6.2 | REGULATIONS, BY REGION | 84 |
| 5.6.2.1 | North America | 84 |
| 5.6.2.2 | Europe | 85 |
| 5.6.2.3 | Asia Pacific | 85 |
| 5.6.2.4 | Middle East & Africa | 86 |
| 5.6.2.5 | Latin America | 86 |
| 5.7 | PATENT ANALYSIS | 86 |
| 5.7.1 | METHODOLOGY | 86 |
| FIGURE 21 | LIST OF MAJOR PATENTS FOR SMART LEARNING | 87 |
| 5.8 | AVERAGE SELLING PRICE TREND | 87 |
| 5.8.1 | AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY HARDWARE | 87 |
| FIGURE 22 | AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY HARDWARE (USD) | 88 |
| TABLE 9 | AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY HARDWARE (USD) | 88 |
| 5.8.2 | AVERAGE SELLING PRICE | 89 |
| TABLE 10 | PRICING ANALYSIS | 89 |
| 5.9 | PORTER'S FIVE FORCES ANALYSIS | 89 |
| FIGURE 23 | SMART LEARNING MARKET: PORTER'S FIVE FORCES ANALYSIS | 90 |
| TABLE 11 | SMART LEARNING MARKET: PORTER'S FIVE FORCES MODEL | 90 |
| 5.9.1 | THREAT OF NEW ENTRANTS | 91 |
| 5.9.2 | THREAT OF SUBSTITUTES | 91 |
| 5.9.3 | BARGAINING POWER OF BUYERS | 91 |
| 5.9.4 | BARGAINING POWER OF SUPPLIERS | 91 |
| 5.9.5 | INTENSITY OF COMPETITIVE RIVALRY | 92 |
| 5.10 | TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES | 92 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

| | | |
|-----------|--|-----|
| FIGURE 24 | TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES | 92 |
| 5.11 | KEY STAKEHOLDERS AND BUYING CRITERIA | 93 |
| 5.11.1 | KEY STAKEHOLDERS IN BUYING PROCESS | 93 |
| FIGURE 25 | INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE END USERS | 93 |
| TABLE 12 | INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE END USERS (%) | 93 |
| 5.11.2 | BUYING CRITERIA | 94 |
| FIGURE 26 | KEY BUYING CRITERIA FOR TOP THREE END USERS | 94 |
| TABLE 13 | KEY BUYING CRITERIA FOR TOP THREE END USERS | 94 |
| 5.12 | KEY CONFERENCES AND EVENTS | 95 |
| TABLE 14 | SMART LEARNING MARKET: LIST OF KEY CONFERENCES AND EVENTS, 2024 | 95 |
| 5.13 | HS CODES: MONITORS & PROJECTORS (8528) | 96 |
| 5.13.1 | EXPORT SCENARIO FOR HS CODE: 8528 | 96 |
| FIGURE 27 | EXPORT VALUE OF MONITORS & PROJECTORS, BY KEY COUNTRY, 2019-2023 (USD MILLION) | 96 |
| 5.13.2 | IMPORT SCENARIO FOR HS CODE: 8528 | 96 |
| FIGURE 28 | IMPORT VALUE OF MONITORS & PROJECTORS, BY KEY COUNTRY, 2019-2023 (USD MILLION) | 97 |
| 5.14 | TECHNOLOGY ROADMAP FOR SMART LEARNING MARKET | 97 |
| 5.14.1 | SHORT-TERM ROADMAP (2023-2025) | 97 |
| 5.14.2 | MID-TERM ROADMAP (2026-2028) | 98 |
| 5.14.3 | LONG-TERM ROADMAP (2029-2030) | 98 |
| 5.15 | BEST PRACTICES TO IMPLEMENT SMART LEARNING SOLUTIONS | 98 |
| 5.16 | CURRENT AND EMERGING BUSINESS MODELS | 99 |
| 5.17 | TOOLS, FRAMEWORKS, AND TECHNIQUES | 100 |
| 5.18 | INVESTMENT AND FUNDING SCENARIO | 100 |
| FIGURE 29 | INVESTMENT AND FUNDING SCENARIO OF MAJOR SMART LEARNING COMPANIES | 100 |
| 6 | SMART LEARNING MARKET, BY OFFERING | 101 |
| 6.1 | INTRODUCTION | 102 |
| 6.1.1 | OFFERING: SMART LEARNING MARKET DRIVERS | 102 |
| FIGURE 30 | SOLUTIONS SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD | 102 |
| TABLE 15 | SMART LEARNING MARKET, BY OFFERING, 2018-2023 (USD MILLION) | 103 |
| TABLE 16 | SMART LEARNING MARKET, BY OFFERING, 2024-2029 (USD MILLION) | 103 |
| 6.2 | HARDWARE | 103 |
| 6.2.1 | HARDWARE SOLUTIONS EMPOWER EDUCATORS AND LEARNERS TO EXPLORE, CREATE, AND INTERACT | 103 |
| TABLE 17 | HARDWARE: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 104 |
| TABLE 18 | HARDWARE: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 104 |
| 6.3 | SOLUTIONS | 104 |
| 6.3.1 | SOLUTIONS ENHANCED COURSES AND MANAGE CLASSROOMS AND SCHOOLS PROFICIENTLY | 104 |
| TABLE 19 | SOLUTIONS: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 105 |
| TABLE 20 | SOLUTIONS: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 105 |
| 6.4 | SERVICES | 105 |
| 6.4.1 | SERVICES EMPOWER INSTITUTIONS TO LEVERAGE CUTTING-EDGE TECHNOLOGIES EFFECTIVELY AND DRIVE INNOVATIONS IN EDUCATION | 105 |
| TABLE 21 | SERVICES: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 106 |
| TABLE 22 | SERVICES: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 106 |
| 7 | SMART LEARNING MARKET, BY HARDWARE | 107 |
| 7.1 | INTRODUCTION | 108 |
| FIGURE 31 | INTERACTIVE DISPLAYS SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD | 108 |
| 7.1.1 | HARDWARE: SMART LEARNING MARKET DRIVERS | 108 |

| | | |
|-----------|---|-----|
| TABLE 23 | SMART LEARNING MARKET, BY HARDWARE, 2018-2023 (USD MILLION) | 108 |
| TABLE 24 | SMART LEARNING MARKET, BY HARDWARE, 2024-2029 (USD MILLION) | 109 |
| 7.2 | INTERACTIVE DISPLAYS | 109 |
| 7.2.1 | INTERACTIVE DISPLAYS INSPIRE STUDENTS AND ENCOURAGE ENTHUSIASM FOR LEARNING | 109 |
| TABLE 25 | INTERACTIVE DISPLAYS: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 109 |
| TABLE 26 | INTERACTIVE DISPLAYS: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 110 |
| 7.3 | INTERACTIVE WHITEBOARDS | 110 |
| 7.3.1 | HELPS USERS INTERACT WITH PROJECTED IMAGE BY DRAWING ON INTERACTIVE WHITEBOARD | 110 |
| TABLE 27 | INTERACTIVE WHITEBOARDS: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 110 |
| TABLE 28 | INTERACTIVE WHITEBOARDS: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 111 |
| 7.4 | SMART BOARDS | 111 |
| 7.4.1 | SMART BOARDS ENABLE MULTIPLE USERS TO INTERACT WITH THEM SIMULTANEOUSLY | 111 |
| TABLE 29 | SMART BOARDS: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 111 |
| TABLE 30 | SMART BOARDS: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 112 |
| 7.5 | SMART TABLES | 112 |
| 7.5.1 | INNOVATIVE FURNITURE WITH INTERACTIVE TECHNOLOGY TO ENHANCE COLLABORATIVE LEARNING EXPERIENCE | 112 |
| TABLE 31 | SMART TABLES: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 112 |
| TABLE 32 | SMART TABLES: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 113 |
| 7.6 | OTHER HARDWARE | 113 |
| TABLE 33 | OTHER HARDWARE: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 113 |
| TABLE 34 | OTHER HARDWARE: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 113 |
| 8 | SMART LEARNING MARKET, BY SOLUTION | 114 |
| 8.1 | INTRODUCTION | 115 |
| 8.1.1 | SOLUTION: SMART LEARNING MARKET DRIVERS | 115 |
| FIGURE 32 | INTEGRATED SOLUTIONS SEGMENT TO GROW AT HIGHER CAGR DURING FORECAST PERIOD | 115 |
| TABLE 35 | SMART LEARNING MARKET, BY SOLUTION, 2018-2023 (USD MILLION) | 115 |
| TABLE 36 | SMART LEARNING MARKET, BY SOLUTION, 2024-2029 (USD MILLION) | 116 |
| 8.2 | INTEGRATED SOLUTIONS | 116 |
| 8.2.1 | INTEGRATED SOLUTIONS PROVIDE HOLISTIC APPROACH TO EDUCATION TECHNOLOGY | 116 |
| TABLE 37 | INTEGRATED SOLUTIONS: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 116 |
| TABLE 38 | INTEGRATED SOLUTIONS: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 117 |
| 8.3 | STANDALONE SOLUTIONS | 117 |
| 8.3.1 | STANDALONE SOLUTIONS CATER TO SPECIFIC EDUCATIONAL NEEDS | 117 |
| FIGURE 33 | LMS/LCMS SEGMENT TO ACCOUNT FOR LARGEST MARKET DURING FORECAST PERIOD | 118 |
| TABLE 39 | SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2018-2023 (USD MILLION) | 118 |
| TABLE 40 | SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2024-2029 (USD MILLION) | 119 |
| TABLE 41 | STANDALONE SOLUTIONS: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 119 |
| TABLE 42 | STANDALONE SOLUTIONS: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 119 |
| 8.3.2 | LEARNING MANAGEMENT SYSTEM/LEARNING CONTENT MANAGEMENT SYSTEM | 120 |
| TABLE 43 | LMS/LCMS: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 120 |
| TABLE 44 | LMS/LCMS: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 120 |
| 8.3.3 | STUDENT INFORMATION SYSTEM | 121 |
| TABLE 45 | STUDENT INFORMATION SYSTEM: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 121 |
| TABLE 46 | STUDENT INFORMATION SYSTEM: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 121 |
| 8.3.4 | CLASSROOM MANAGEMENT SOFTWARE | 122 |
| TABLE 47 | CLASSROOM MANAGEMENT SOFTWARE: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 122 |
| TABLE 48 | CLASSROOM MANAGEMENT SOFTWARE: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 122 |

8.3.5 LANGUAGE LEARNING SOFTWARE 123

TABLE 49 LANGUAGE LEARNING SOFTWARE: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) 123

TABLE 50 LANGUAGE LEARNING SOFTWARE: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) 123

8.3.6 ADAPTIVE LEARNING PLATFORM 124

TABLE 51 ADAPTIVE LEARNING PLATFORM: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) 124

TABLE 52 ADAPTIVE LEARNING PLATFORM: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) 124

8.3.7 OTHERS 125

TABLE 53 OTHERS: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) 125

TABLE 54 OTHERS: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) 126

9 SMART LEARNING MARKET, BY SERVICE 127

9.1 INTRODUCTION 128

FIGURE 34 SUPPORT AND MAINTENANCE TO WITNESS HIGHEST CAGR DURING FORECAST PERIOD IN SERVICES SEGMENT 128

9.1.1 SERVICE: SMART LEARNING MARKET DRIVERS 128

TABLE 55 SMART LEARNING MARKET, BY SERVICE, 2018-2023 (USD MILLION) 128

TABLE 56 SMART LEARNING MARKET, BY SERVICE, 2024-2029 (USD MILLION) 129

9.2 CONSULTING 129

9.2.1 CONSULTING SERVICES FOCUS MORE ON OFFERING SUPERIOR CUSTOMER SERVICE 129

TABLE 57 CONSULTING: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) 129

TABLE 58 CONSULTING: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) 129

9.3 IMPLEMENTATION 130

9.3.1 IMPLEMENTATION SERVICES ENABLE ORGANIZATIONS TO CUSTOMIZE SMART LEARNING SOLUTIONS TO MATCH THEIR ORGANIZATIONAL NEEDS 130

TABLE 59 IMPLEMENTATION: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) 130

TABLE 60 IMPLEMENTATION: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) 130

9.4 SUPPORT AND MAINTENANCE 131

9.4.1 PROVIDES ONLINE AND ONSITE SUPPORT AND MAINTENANCE TO USERS 131

TABLE 61 SUPPORT AND MAINTENANCE: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) 131

TABLE 62 SUPPORT AND MAINTENANCE: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) 131

10 SMART LEARNING MARKET, BY LEARNING TYPE 132

10.1 INTRODUCTION 133

10.1.1 LEARNING TYPE: SMART LEARNING MARKET DRIVERS 133

FIGURE 35 SYNCHRONOUS LEARNING SEGMENT TO RECORD HIGHER CAGR DURING FORECAST PERIOD IN SMART LEARNING MARKET 133

TABLE 63 SMART LEARNING MARKET, BY LEARNING TYPE, 2018-2023 (USD MILLION) 134

TABLE 64 SMART LEARNING MARKET, BY LEARNING TYPE, 2024-2029 (USD MILLION) 134

10.2 SYNCHRONOUS LEARNING 134

10.2.1 TECHNOLOGICAL ENHANCEMENTS ENABLING USERS TO COMMUNICATE IN REAL-TIME TO DRIVE MARKET 134

TABLE 65 SYNCHRONOUS LEARNING: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) 134

TABLE 66 SYNCHRONOUS LEARNING: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) 135

10.3 ASYNCHRONOUS LEARNING 135

10.3.1 LEARNERS CAN BE SELF-PACED WITH ASYNCHRONOUS LEARNING 135

TABLE 67 ASYNCHRONOUS LEARNING: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) 135

TABLE 68 ASYNCHRONOUS LEARNING: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) 136

11 SMART LEARNING MARKET, BY END USER 137

11.1 INTRODUCTION 138

11.1.1 END USER: SMART LEARNING MARKET DRIVERS 138

FIGURE 36 ENTERPRISES SEGMENT TO WITNESS HIGHEST GROWTH RATE DURING FORECAST PERIOD 139

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

| | | |
|-----------|--|-----|
| TABLE 69 | SMART LEARNING MARKET, BY END USER, 2018-2023 (USD MILLION) | 139 |
| TABLE 70 | SMART LEARNING MARKET, BY END USER, 2024-2029 (USD MILLION) | 139 |
| 11.2 | ACADEMIC | 140 |
| 11.2.1 | INCREASING ADOPTION OF MOBILE PHONES AND SMART DEVICES BOOSTING SMART LEARNING MARKET FOR ACADEMIC | 140 |
| FIGURE 37 | K-12 SEGMENT TO GROW AT HIGHER CAGR DURING FORECAST PERIOD | 140 |
| TABLE 71 | SMART LEARNING MARKET, BY ACADEMIC END USER, 2018-2023 (USD MILLION) | 140 |
| TABLE 72 | SMART LEARNING MARKET, BY ACADEMIC END USER, 2024-2029 (USD MILLION) | 141 |
| TABLE 73 | ACADEMIC: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 141 |
| TABLE 74 | ACADEMIC: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 141 |
| 11.2.2 | ACADEMIC: SMART LEARNING USE CASES | 141 |
| 11.2.3 | K-12 | 142 |
| TABLE 75 | K-12: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 142 |
| TABLE 76 | K-12: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 142 |
| 11.2.4 | HIGHER EDUCATION | 143 |
| TABLE 77 | HIGHER EDUCATION: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 143 |
| TABLE 78 | HIGHER EDUCATION: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 143 |
| 11.3 | ENTERPRISES | 144 |
| 11.3.1 | ENTERPRISES USE SMART LEARNING SOLUTIONS TO TRAIN AND ASSESS EMPLOYEES BY PROVIDING INSTRUCTIONS AND SUGGESTIONS | 144 |
| 11.3.2 | ENTERPRISES: SMART LEARNING USE CASES | 144 |
| FIGURE 38 | SME TO WITNESS HIGHER GROWTH RATE DURING FORECAST PERIOD | 144 |
| TABLE 79 | SMART LEARNING MARKET, BY ENTERPRISE END USER, 2018-2023 (USD MILLION) | 145 |
| TABLE 80 | SMART LEARNING MARKET, BY ENTERPRISE END USER, 2024-2029 (USD MILLION) | 145 |
| TABLE 81 | ENTERPRISES: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 145 |
| TABLE 82 | ENTERPRISES: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 145 |
| 11.3.3 | SMES | 146 |
| TABLE 83 | SMES: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 146 |
| TABLE 84 | SMES: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 146 |
| 11.3.4 | LARGE ENTERPRISES | 147 |
| TABLE 85 | LARGE ENTERPRISES: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 147 |
| TABLE 86 | LARGE ENTERPRISES: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 147 |
| 11.4 | GOVERNMENT | 148 |
| 11.4.1 | SMART LEARNING SOLUTIONS HELP UPSKILL GOVERNMENT EMPLOYEES | 148 |
| 11.4.2 | GOVERNMENT: SMART LEARNING USE CASES | 148 |
| TABLE 87 | GOVERNMENT: SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 148 |
| TABLE 88 | GOVERNMENT: SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 149 |
| 12 | SMART LEARNING MARKET, BY REGION | 150 |
| 12.1 | INTRODUCTION | 151 |
| FIGURE 39 | ASIA PACIFIC TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD | 151 |
| TABLE 89 | SMART LEARNING MARKET, BY REGION, 2018-2023 (USD MILLION) | 151 |
| TABLE 90 | SMART LEARNING MARKET, BY REGION, 2024-2029 (USD MILLION) | 152 |
| 12.2 | NORTH AMERICA | 152 |
| 12.2.1 | NORTH AMERICA: SMART LEARNING MARKET DRIVERS | 152 |
| 12.2.2 | NORTH AMERICA: RECESSION IMPACT | 153 |
| FIGURE 40 | NORTH AMERICA: MARKET SNAPSHOT | 153 |
| TABLE 91 | NORTH AMERICA: SMART LEARNING MARKET, BY OFFERING, 2018-2023 (USD MILLION) | 154 |
| TABLE 92 | NORTH AMERICA: SMART LEARNING MARKET, BY OFFERING, 2024-2029 (USD MILLION) | 154 |

| | | |
|-----------|---|-----|
| TABLE 93 | NORTH AMERICA: SMART LEARNING MARKET, BY HARDWARE, 2018-2023 (USD MILLION) | 154 |
| TABLE 94 | NORTH AMERICA: SMART LEARNING MARKET, BY HARDWARE, 2024-2029 (USD MILLION) | 155 |
| TABLE 95 | NORTH AMERICA: SMART LEARNING MARKET, BY SOLUTION, 2018-2023 (USD MILLION) | 155 |
| TABLE 96 | NORTH AMERICA: SMART LEARNING MARKET, BY SOLUTION, 2024-2029 (USD MILLION) | 155 |
| TABLE 97 | NORTH AMERICA: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2018-2023 (USD MILLION) | 155 |
| TABLE 98 | NORTH AMERICA: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2024-2029 (USD MILLION) | 156 |
| TABLE 99 | NORTH AMERICA: SMART LEARNING MARKET SIZE, BY SERVICE, 2018-2023 (USD MILLION) | 156 |
| TABLE 100 | NORTH AMERICA: SMART LEARNING MARKET, BY SERVICE, 2024-2029 (USD MILLION) | 156 |
| TABLE 101 | NORTH AMERICA: SMART LEARNING MARKET, BY LEARNING TYPE, 2018-2023 (USD MILLION) | 157 |
| TABLE 102 | NORTH AMERICA: SMART LEARNING MARKET, BY LEARNING TYPE, 2024-2029 (USD MILLION) | 157 |
| TABLE 103 | NORTH AMERICA: SMART LEARNING MARKET, BY END USER, 2018-2023 (USD MILLION) | 157 |
| TABLE 104 | NORTH AMERICA: SMART LEARNING MARKET, BY END USER, 2024-2029 (USD MILLION) | 157 |
| TABLE 105 | NORTH AMERICA: SMART LEARNING MARKET, BY ACADEMIC, 2018-2023 (USD MILLION) | 158 |
| TABLE 106 | NORTH AMERICA: SMART LEARNING MARKET, BY ACADEMIC, 2024-2029 (USD MILLION) | 158 |
| TABLE 107 | NORTH AMERICA: SMART LEARNING MARKET, BY ENTERPRISE, 2018-2023 (USD MILLION) | 158 |
| TABLE 108 | NORTH AMERICA: SMART LEARNING MARKET, BY ENTERPRISE, 2024-2029 (USD MILLION) | 158 |
| TABLE 109 | NORTH AMERICA: SMART LEARNING MARKET, BY COUNTRY, 2018-2023 (USD MILLION) | 159 |
| TABLE 110 | NORTH AMERICA: SMART LEARNING MARKET, BY COUNTRY, 2024-2029 (USD MILLION) | 159 |
| 12.2.3 | US | 159 |

12.2.3.1 Regulatory initiatives, robust investments, and innovative corporate initiatives to drive market growth 159

| | | |
|-----------|--|-----|
| TABLE 111 | US: SMART LEARNING MARKET, BY OFFERING, 2018-2023 (USD MILLION) | 160 |
| TABLE 112 | US: SMART LEARNING MARKET, BY OFFERING, 2024-2029 (USD MILLION) | 160 |
| TABLE 113 | US: SMART LEARNING MARKET, BY HARDWARE, 2018-2023 (USD MILLION) | 160 |
| TABLE 114 | US: SMART LEARNING MARKET, BY HARDWARE, 2024-2029 (USD MILLION) | 161 |
| TABLE 115 | US: SMART LEARNING MARKET, BY SOLUTION, 2018-2023 (USD MILLION) | 161 |
| TABLE 116 | US: SMART LEARNING MARKET, BY SOLUTION, 2024-2029 (USD MILLION) | 161 |
| TABLE 117 | US: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2018-2023 (USD MILLION) | 161 |
| TABLE 118 | US: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2024-2029 (USD MILLION) | 162 |
| TABLE 119 | US: SMART LEARNING MARKET, BY SERVICE, 2018-2023 (USD MILLION) | 162 |
| TABLE 120 | US: SMART LEARNING MARKET, BY SERVICE, 2024-2029 (USD MILLION) | 162 |
| TABLE 121 | US: SMART LEARNING MARKET, BY LEARNING TYPE, 2018-2023 (USD MILLION) | 162 |
| TABLE 122 | US: SMART LEARNING MARKET, BY LEARNING TYPE, 2024-2029 (USD MILLION) | 163 |
| TABLE 123 | US: SMART LEARNING MARKET, BY END USER, 2018-2023 (USD MILLION) | 163 |
| TABLE 124 | US: SMART LEARNING MARKET, BY END USER, 2024-2029 (USD MILLION) | 163 |
| TABLE 125 | US: SMART LEARNING MARKET, BY ACADEMIC, 2018-2023 (USD MILLION) | 163 |
| TABLE 126 | US: SMART LEARNING MARKET, BY ACADEMIC, 2024-2029 (USD MILLION) | 164 |
| TABLE 127 | US: SMART LEARNING MARKET, BY ENTERPRISE, 2018-2023 (USD MILLION) | 164 |
| TABLE 128 | US: SMART LEARNING MARKET, BY ENTERPRISE, 2024-2029 (USD MILLION) | 164 |

12.2.4 CANADA 164

12.2.4.1 Smart learning to enable Canada to navigate growth amidst challenges 164

| | | |
|-----------|--|-----|
| TABLE 129 | CANADA: SMART LEARNING MARKET, BY OFFERING, 2018-2023 (USD MILLION) | 165 |
| TABLE 130 | CANADA: SMART LEARNING MARKET, BY OFFERING, 2024-2029 (USD MILLION) | 165 |
| TABLE 131 | CANADA: SMART LEARNING MARKET, BY HARDWARE, 2018-2023 (USD MILLION) | 165 |
| TABLE 132 | CANADA: SMART LEARNING MARKET, BY HARDWARE, 2024-2029 (USD MILLION) | 166 |
| TABLE 133 | CANADA: SMART LEARNING MARKET, BY SOLUTION, 2018-2023 (USD MILLION) | 166 |
| TABLE 134 | CANADA: SMART LEARNING MARKET, BY SOLUTION, 2024-2029 (USD MILLION) | 166 |
| TABLE 135 | CANADA: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2018-2023 (USD MILLION) | 166 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

| | | |
|-----------|--|-----|
| TABLE 136 | CANADA: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2024-2029 (USD MILLION) | 167 |
| TABLE 137 | CANADA: SMART LEARNING MARKET, BY SERVICE, 2018-2023 (USD MILLION) | 167 |
| TABLE 138 | CANADA: SMART LEARNING MARKET, BY SERVICE, 2024-2029 (USD MILLION) | 167 |
| TABLE 139 | CANADA: SMART LEARNING MARKET, BY LEARNING TYPE, 2018-2023 (USD MILLION) | 168 |
| TABLE 140 | CANADA: SMART LEARNING MARKET, BY LEARNING TYPE, 2024-2029 (USD MILLION) | 168 |
| TABLE 141 | CANADA: SMART LEARNING MARKET, BY END USER, 2018-2023 (USD MILLION) | 168 |
| TABLE 142 | CANADA: SMART LEARNING MARKET, BY END USER, 2024-2029 (USD MILLION) | 168 |
| TABLE 143 | CANADA: SMART LEARNING MARKET, BY ACADEMIC, 2018-2023 (USD MILLION) | 169 |
| TABLE 144 | CANADA: SMART LEARNING MARKET, BY ACADEMIC, 2024-2029 (USD MILLION) | 169 |
| TABLE 145 | CANADA: SMART LEARNING MARKET, BY ENTERPRISE, 2018-2023 (USD MILLION) | 169 |
| TABLE 146 | CANADA: SMART LEARNING MARKET, BY ENTERPRISE, 2024-2029 (USD MILLION) | 169 |
| 12.3 | EUROPE | 170 |
| 12.3.1 | EUROPE: SMART LEARNING MARKET DRIVERS | 170 |
| 12.3.2 | EUROPE: RECESSION IMPACT | 171 |
| TABLE 147 | EUROPE: SMART LEARNING MARKET, BY OFFERING, 2018-2023 (USD MILLION) | 171 |
| TABLE 148 | EUROPE: SMART LEARNING MARKET, BY OFFERING, 2024-2029 (USD MILLION) | 171 |
| TABLE 149 | EUROPE: SMART LEARNING MARKET, BY HARDWARE, 2018-2023 (USD MILLION) | 172 |
| TABLE 150 | EUROPE: SMART LEARNING MARKET, BY HARDWARE, 2024-2029 (USD MILLION) | 172 |
| TABLE 151 | EUROPE: SMART LEARNING MARKET, BY SOLUTION, 2018-2023 (USD MILLION) | 172 |
| TABLE 152 | EUROPE: SMART LEARNING MARKET, BY SOLUTION, 2024-2029 (USD MILLION) | 172 |
| TABLE 153 | EUROPE: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2018-2023 (USD MILLION) | 173 |
| TABLE 154 | EUROPE: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2024-2029 (USD MILLION) | 173 |
| TABLE 155 | EUROPE: SMART LEARNING MARKET, BY SERVICE, 2018-2023 (USD MILLION) | 173 |
| TABLE 156 | EUROPE: SMART LEARNING MARKET, BY SERVICE, 2024-2029 (USD MILLION) | 174 |
| TABLE 157 | EUROPE: SMART LEARNING MARKET, BY LEARNING TYPE, 2018-2023 (USD MILLION) | 174 |
| TABLE 158 | EUROPE: SMART LEARNING MARKET, BY LEARNING TYPE, 2024-2029 (USD MILLION) | 174 |
| TABLE 159 | EUROPE: SMART LEARNING MARKET, BY END USER, 2018-2023 (USD MILLION) | 174 |
| TABLE 160 | EUROPE: SMART LEARNING MARKET, BY END USER, 2024-2029 (USD MILLION) | 175 |
| TABLE 161 | EUROPE: SMART LEARNING MARKET, BY ACADEMIC, 2018-2023 (USD MILLION) | 175 |
| TABLE 162 | EUROPE: SMART LEARNING MARKET, BY ACADEMIC, 2024-2029 (USD MILLION) | 175 |
| TABLE 163 | EUROPE: SMART LEARNING MARKET, BY ENTERPRISE, 2018-2023 (USD MILLION) | 175 |
| TABLE 164 | EUROPE: SMART LEARNING MARKET, BY ENTERPRISE, 2024-2029 (USD MILLION) | 176 |
| TABLE 165 | EUROPE: SMART LEARNING MARKET, BY COUNTRY, 2018-2023 (USD MILLION) | 176 |
| TABLE 166 | EUROPE: SMART LEARNING MARKET, BY COUNTRY, 2024-2029 (USD MILLION) | 176 |
| 12.3.3 | UK | 177 |
| 12.3.3.1 | Government's substantial investment proposals to drive market growth | 177 |
| TABLE 167 | UK: SMART LEARNING MARKET, BY OFFERING, 2018-2023 (USD MILLION) | 177 |
| TABLE 168 | UK: SMART LEARNING MARKET, BY OFFERING, 2024-2029 (USD MILLION) | 177 |
| TABLE 169 | UK: SMART LEARNING MARKET, BY HARDWARE, 2018-2023 (USD MILLION) | 178 |
| TABLE 170 | UK: SMART LEARNING MARKET, BY HARDWARE, 2024-2029 (USD MILLION) | 178 |
| TABLE 171 | UK: SMART LEARNING MARKET, BY SOLUTION, 2018-2023 (USD MILLION) | 178 |
| TABLE 172 | UK: SMART LEARNING MARKET, BY SOLUTION, 2024-2029 (USD MILLION) | 178 |
| TABLE 173 | UK: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2018-2023 (USD MILLION) | 179 |
| TABLE 174 | UK: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2024-2029 (USD MILLION) | 179 |
| TABLE 175 | UK: SMART LEARNING MARKET, BY SERVICE, 2018-2023 (USD MILLION) | 179 |
| TABLE 176 | UK: SMART LEARNING MARKET, BY SERVICE, 2024-2029 (USD MILLION) | 180 |
| TABLE 177 | UK: SMART LEARNING MARKET, BY LEARNING TYPE, 2018-2023 (USD MILLION) | 180 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

| | | |
|-----------|---|-----|
| TABLE 178 | UK: SMART LEARNING MARKET, BY LEARNING TYPE, 2024-2029 (USD MILLION) | 180 |
| TABLE 179 | UK: SMART LEARNING MARKET, BY END USER, 2018-2023 (USD MILLION) | 180 |
| TABLE 180 | UK: SMART LEARNING MARKET, BY END USER, 2024-2029 (USD MILLION) | 181 |
| TABLE 181 | UK: SMART LEARNING MARKET, BY ACADEMIC, 2018-2023 (USD MILLION) | 181 |
| TABLE 182 | UK: SMART LEARNING MARKET, BY ACADEMIC, 2024-2029 (USD MILLION) | 181 |
| TABLE 183 | UK: SMART LEARNING MARKET, BY ENTERPRISE, 2018-2023 (USD MILLION) | 181 |
| TABLE 184 | UK: SMART LEARNING MARKET, BY ENTERPRISE, 2024-2029 (USD MILLION) | 181 |
| 12.3.4 | GERMANY | 182 |
| 12.3.4.1 | Tech-savvy students and adoption of modern technologies to propel market | 182 |
| TABLE 185 | GERMANY: SMART LEARNING MARKET, BY OFFERING, 2018-2023 (USD MILLION) | 182 |
| TABLE 186 | GERMANY: SMART LEARNING MARKET, BY OFFERING, 2024-2029 (USD MILLION) | 182 |
| TABLE 187 | GERMANY: SMART LEARNING MARKET, BY HARDWARE, 2018-2023 (USD MILLION) | 183 |
| TABLE 188 | GERMANY: SMART LEARNING MARKET, BY HARDWARE, 2024-2029 (USD MILLION) | 183 |
| TABLE 189 | GERMANY: SMART LEARNING MARKET, BY SOLUTION, 2018-2023 (USD MILLION) | 183 |
| TABLE 190 | GERMANY: SMART LEARNING MARKET, BY SOLUTION, 2024-2029 (USD MILLION) | 183 |
| TABLE 191 | GERMANY: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2018-2023 (USD MILLION) | 184 |
| TABLE 192 | GERMANY: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2024-2029 (USD MILLION) | 184 |
| TABLE 193 | GERMANY: SMART LEARNING MARKET, BY SERVICE, 2018-2023 (USD MILLION) | 184 |
| TABLE 194 | GERMANY: SMART LEARNING MARKET, BY SERVICE, 2024-2029 (USD MILLION) | 185 |
| TABLE 195 | GERMANY: SMART LEARNING MARKET, BY LEARNING TYPE, 2018-2023 (USD MILLION) | 185 |
| TABLE 196 | GERMANY: SMART LEARNING MARKET, BY LEARNING TYPE, 2024-2029 (USD MILLION) | 185 |
| TABLE 197 | GERMANY: SMART LEARNING MARKET, BY END USER, 2018-2023 (USD MILLION) | 185 |
| TABLE 198 | GERMANY: SMART LEARNING MARKET, BY END USER, 2024-2029 (USD MILLION) | 186 |
| TABLE 199 | GERMANY: SMART LEARNING MARKET, BY ACADEMIC, 2018-2023 (USD MILLION) | 186 |
| TABLE 200 | GERMANY: SMART LEARNING MARKET, BY ACADEMIC, 2024-2029 (USD MILLION) | 186 |
| TABLE 201 | GERMANY: SMART LEARNING MARKET, BY ENTERPRISE, 2018-2023 (USD MILLION) | 186 |
| TABLE 202 | GERMANY: SMART LEARNING MARKET, BY ENTERPRISE, 2024-2029 (USD MILLION) | 187 |
| 12.3.5 | FRANCE | 187 |
| 12.3.5.1 | Strong economic infrastructure and high internet penetration to be key driver for market growth | 187 |
| 12.3.6 | ITALY | 187 |
| 12.3.6.1 | Government initiatives to transform traditional classrooms into cutting-edge learning environments | 187 |
| 12.3.7 | SPAIN | 188 |
| 12.3.7.1 | Spain's flourishing startup ecosystem and innovative educational technology companies to bolster growth | 188 |
| 12.3.8 | NORDIC | 188 |
| 12.3.8.1 | High level of internet penetration and tech-savvy population to boost smart learning market growth | 188 |
| 12.3.9 | REST OF EUROPE | 188 |
| 12.4 | ASIA PACIFIC | 189 |
| 12.4.1 | ASIA PACIFIC: SMART LEARNING MARKET DRIVERS | 189 |
| 12.4.2 | ASIA PACIFIC: RECESSION IMPACT | 189 |
| FIGURE 41 | ASIA PACIFIC: MARKET SNAPSHOT | 190 |
| TABLE 203 | ASIA PACIFIC: SMART LEARNING MARKET, BY OFFERING, 2018-2023 (USD MILLION) | 191 |
| TABLE 204 | ASIA PACIFIC: SMART LEARNING MARKET, BY OFFERING, 2024-2029 (USD MILLION) | 191 |
| TABLE 205 | ASIA PACIFIC: SMART LEARNING MARKET, BY HARDWARE, 2018-2023 (USD MILLION) | 191 |
| TABLE 206 | ASIA PACIFIC: SMART LEARNING MARKET, BY HARDWARE, 2024-2029 (USD MILLION) | 191 |
| TABLE 207 | ASIA PACIFIC: SMART LEARNING MARKET, BY SOLUTION, 2018-2023 (USD MILLION) | 192 |
| TABLE 208 | ASIA PACIFIC: SMART LEARNING MARKET SIZE, BY SOLUTION, 2024-2029 (USD MILLION) | 192 |
| TABLE 209 | ASIA PACIFIC: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2018-2023 (USD MILLION) | 192 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

| | | |
|-----------|--|-----|
| TABLE 210 | ASIA PACIFIC: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2024-2029 (USD MILLION) | 193 |
| TABLE 211 | ASIA PACIFIC: SMART LEARNING MARKET, BY SERVICE, 2018-2023 (USD MILLION) | 193 |
| TABLE 212 | ASIA PACIFIC: SMART LEARNING MARKET, BY SERVICE, 2024-2029 (USD MILLION) | 193 |
| TABLE 213 | ASIA PACIFIC: SMART LEARNING MARKET, BY LEARNING TYPE, 2018-2023 (USD MILLION) | 194 |
| TABLE 214 | ASIA PACIFIC: SMART LEARNING MARKET, BY LEARNING TYPE, 2024-2029 (USD MILLION) | 194 |
| TABLE 215 | ASIA PACIFIC: SMART LEARNING MARKET, BY END USER, 2018-2023 (USD MILLION) | 194 |
| TABLE 216 | ASIA PACIFIC: SMART LEARNING MARKET, BY END USER, 2024-2029 (USD MILLION) | 194 |
| TABLE 217 | ASIA PACIFIC: SMART LEARNING MARKET, BY ACADEMIC, 2018-2023 (USD MILLION) | 195 |
| TABLE 218 | ASIA PACIFIC: SMART LEARNING MARKET, BY ACADEMIC, 2024-2029 (USD MILLION) | 195 |
| TABLE 219 | ASIA PACIFIC: SMART LEARNING MARKET, BY ENTERPRISE, 2018-2023 (USD MILLION) | 195 |
| TABLE 220 | ASIA PACIFIC: SMART LEARNING MARKET, BY ENTERPRISE, 2024-2029 (USD MILLION) | 195 |
| TABLE 221 | ASIA PACIFIC: SMART LEARNING MARKET, BY COUNTRY, 2018-2023 (USD MILLION) | 196 |
| TABLE 222 | ASIA PACIFIC: SMART LEARNING MARKET, BY COUNTRY, 2024-2029 (USD MILLION) | 196 |
| 12.4.3 | CHINA | 196 |
| 12.4.3.1 | Surging educational awareness to have positive impact on industry growth | 196 |
| TABLE 223 | CHINA: SMART LEARNING MARKET, BY OFFERING, 2018-2023 (USD MILLION) | 197 |
| TABLE 224 | CHINA: SMART LEARNING MARKET, BY OFFERING, 2024-2029 (USD MILLION) | 197 |
| TABLE 225 | CHINA: SMART LEARNING MARKET, BY HARDWARE, 2018-2023 (USD MILLION) | 197 |
| TABLE 226 | CHINA: SMART LEARNING MARKET, BY HARDWARE, 2024-2029 (USD MILLION) | 198 |
| TABLE 227 | CHINA: SMART LEARNING MARKET, BY SOLUTION, 2018-2023 (USD MILLION) | 198 |
| TABLE 228 | CHINA: SMART LEARNING MARKET, BY SOLUTION, 2024-2029 (USD MILLION) | 198 |
| TABLE 229 | CHINA: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2018-2023 (USD MILLION) | 198 |
| TABLE 230 | CHINA: SMART LEARNING MARKET, BY STANDALONE SOLUTION, 2024-2029 (USD MILLION) | 199 |
| TABLE 231 | CHINA: SMART LEARNING MARKET, BY SERVICE, 2018-2023 (USD MILLION) | 199 |
| TABLE 232 | CHINA: SMART LEARNING MARKET, BY SERVICE, 2024-2029 (USD MILLION) | 199 |
| TABLE 233 | CHINA: SMART LEARNING MARKET, BY LEARNING TYPE, 2018-2023 (USD MILLION) | 199 |
| TABLE 234 | CHINA: SMART LEARNING MARKET, BY LEARNING TYPE, 2024-2029 (USD MILLION) | 200 |
| TABLE 235 | CHINA: SMART LEARNING MARKET, BY END USER, 2018-2023 (USD MILLION) | 200 |
| TABLE 236 | CHINA: SMART LEARNING MARKET, BY END USER, 2024-2029 (USD MILLION) | 200 |
| TABLE 237 | CHINA: SMART LEARNING MARKET, BY ACADEMIC, 2018-2023 (USD MILLION) | 200 |
| TABLE 238 | CHINA: SMART LEARNING MARKET, BY ACADEMIC, 2024-2029 (USD MILLION) | 201 |
| TABLE 239 | CHINA: SMART LEARNING MARKET, BY ENTERPRISE, 2018-2023 (USD MILLION) | 201 |
| TABLE 240 | CHINA: SMART LEARNING MARKET, BY ENTERPRISE, 2024-2029 (USD MILLION) | 201 |

Smart Learning Market by Offering (Hardware, Solutions (Integrated Solutions and Standalone Solutions), and Services), Learning Type (Synchronous Learning and Asynchronous Learning), End User and Region - Global Forecast to 2029

Market Report | 2024-05-20 | 308 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

| Select license | License | Price |
|----------------|-------------------------|------------|
| | Single User | \$4950.00 |
| | Multi User | \$6650.00 |
| | Corporate License | \$8150.00 |
| | Enterprise Site License | \$10000.00 |
| | | VAT |
| | | Total |

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

| | | | |
|---------------|----------------------|-------------------------------|----------------------|
| Email* | <input type="text"/> | Phone* | <input type="text"/> |
| First Name* | <input type="text"/> | Last Name* | <input type="text"/> |
| Job title* | <input type="text"/> | | |
| Company Name* | <input type="text"/> | EU Vat / Tax ID / NIP number* | <input type="text"/> |
| Address* | <input type="text"/> | City* | <input type="text"/> |
| Zip Code* | <input type="text"/> | Country* | <input type="text"/> |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Date

2025-05-19

Signature



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com