

E-Learning Market - Global Outlook & Forecast 2024-2029

Market Report | 2024-10-03 | 844 pages | Arizton Advisory & Intelligence

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Report description:

The global e-learning market is expected to grow at a CAGR of 11.88% from 2023 to 2029.

The e-learning market also called the online learning market or digital education market, encompasses providing educational content and services through digital technology and the internet. This sector has seen significant growth and transformation in recent years, driven by technological advancements, evolving educational needs, and increasing internet accessibility. The rise of mobile devices, cloud computing, and sophisticated learning management systems (LMS) has facilitated a more flexible and personalized learning experience. Furthermore, expanding internet infrastructure has broadened access to educational resources, making learning more accessible to a diverse audience. These factors collectively contribute to the dynamic nature of the e-learning market, positioning it as a key component of modern education and training. Some of the key factors driving the market include:

- **Technological Advancements:** Innovations in artificial intelligence (AI), virtual reality (VR), augmented reality (AR), and machine learning are revolutionizing the e-learning landscape. These technologies enhance the learning experience by providing personalized, immersive, and interactive content. AI-powered adaptive learning systems can tailor educational material to individual learners' needs, while VR and AR offer realistic simulations and practical training experiences.
- **Mobile Learning:** The proliferation of smartphones and mobile devices has made learning more accessible and convenient. Mobile learning, or m-learning, allows individuals to access educational content on the go, fitting learning into their busy schedules. This trend is particularly significant in regions with high mobile penetration, such as Asia-Pacific and Africa.
- **Gamification:** Incorporating game elements into e-learning is gaining traction to increase learner engagement and motivation. Gamification uses point scoring, leaderboards, and badges to make learning more interactive and enjoyable. This approach is effective in both academic and corporate settings.
- **Microlearning:** Delivering content in small, easily digestible chunks is becoming increasingly popular. Microlearning is particularly effective for busy professionals who need to acquire specific skills quickly. This trend aligns with the growing demand for on-demand learning solutions that cater to individual needs.
- **Massive Open Online Courses (MOOCs):** MOOCs have democratized access to high-quality education from prestigious institutions. They offer free or low-cost courses to a global audience, making education more inclusive.

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E-LEARNING MARKET TRENDS & DRIVERS

Evolution of Learning and Training in the Digital Era

Digital transformation revolutionizes educational institutions by reshaping business models to meet evolving consumer demands. Key technological trends such as the Internet of Things (IoT), augmented reality (AR), cybersecurity, personalized learning, artificial intelligence (AI), and big data are driving this change. The adoption of IoT has significantly transformed the learning environment by connecting devices and enabling more interactive and adaptive learning experiences. Mobile technology, including tablets and smartphones, enhances educational outcomes by increasing accessibility, improving campus safety, and reducing the need for on-site equipment. Cloud-connected devices allow educators to offer personalized attention to students, making learning more effective and efficient, while digital textbooks alleviate storage and cost concerns associated with physical books.

Augmented reality is a powerful tool for immersive learning experiences, particularly in complex subjects. AR enhances collaboration, deepens content understanding, and boosts information retention, making it a valuable asset in STEM education. It also reduces the need for physical lab supplies and equipment, offering a more accessible and engaging learning experience. Further, these technological advancements align with the growing demand for e-learning platforms, which capitalize on these innovations to offer flexible, interactive, and personalized educational experiences. As institutions continue integrating these technologies, e-learning platforms become increasingly integral to modern education, providing scalable solutions catering to diverse learning needs and environments.

Growth in Gamification

Technology is increasingly integral to various sectors, including education, which fosters significant advancements and innovation. One of the key trends shaping the e-learning market is the integration of gamification, which leverages game-design elements and principles to enhance learning experiences. Gamification revolutionizes e-learning by making educational processes more engaging, motivating, and effective. Also, the rise of gamification in e-learning transforms traditional learning methods by incorporating elements such as points, badges, leaderboards, and interactive challenges. These features boost learner engagement and retention by turning educational content into interactive and enjoyable experiences. For example, platforms like Duolingo use gamification to teach languages, making the process fun and rewarding for users and enhancing their learning outcomes.

Similar to advancements in cloud gaming, cloud-based gamification tools are also playing a significant role in the e-learning market. These tools allow educators to integrate gamified elements into their courses without requiring extensive technical infrastructure. Platforms such as Kahoot! and Quizizz offer interactive quizzes and games that can be accessed from any device, making learning more accessible and dynamic. Also, the incorporation of gamification into e-learning platforms is driven by its ability to create immersive and personalized learning environments. This approach motivates learners and provides valuable insights into their progress and performance. As a result, gamification contributes to the e-learning market's positive growth by enhancing learner engagement, improving educational outcomes, and offering new opportunities for educational innovation.

SEGMENTATION INSIGHTS

INSIGHTS BY LEARNING MODE

The global e-learning market by learning mode is segmented into self-paced and instructor-led. Self-paced courses command a dominant global e-learning market share, a trend attributed to several key factors from a research perspective. Firstly, the flexibility inherent in self-paced learning models aligns with the growing demand for personalized and on-demand educational experiences. Modern learners, mainly working professionals and students with diverse schedules, benefit significantly from the

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ability to access and complete coursework at their convenience rather than adhering to the rigid timelines often associated with instructor-led courses. This adaptability accommodates varied learning paces and fosters a more inclusive educational environment that caters to different learning styles and life commitments.

Moreover, the scalability and cost-efficiency of self-paced courses contribute to their widespread adoption. These courses typically require fewer resources to produce and deliver than instructor-led formats, often requiring live sessions and direct instructor involvement. The reduced overhead costs make self-paced courses more affordable for learners and profitable for educational institutions and e-learning providers. This economic advantage is particularly pertinent in global education markets where cost and access remain significant barriers. Also, technological advancements further amplify the appeal of self-paced learning. Integrating interactive multimedia content, such as videos, simulations, and quizzes, enhances engagement and retention, making self-paced courses more effective and appealing. Additionally, the proliferation of mobile and internet technologies ensures that self-paced learning is accessible to a broader audience, including those in remote or underserved areas.

Segmentation by Learning Mode

- Self Faced
- Instructor Led

INSIGHTS BY END USERS

The global e-learning market by end-users is segmented into corporates, academic institutions, individual learners, government organizations, the healthcare sector, non-profit organizations, and others. The corporates represent a substantial share of the global e-learning market compared to other sectors, driven by several critical factors. Corporations invest heavily in e-learning to ensure their workforce remains skilled and adaptable to technological advancements and industry changes. E-learning allows corporations to deliver training to employees across different geographies and time zones, making it an ideal solution for multinational companies. This scalability allows for uniform training standards and consistent quality across the organization.

Segmentation by End-users

- Corporates
- Academic Institutions
- Individual Learners
- Government Organizations
- Healthcare Sector
- Non-Profit Organizations
- Others

INSIGHTS BY FUNCTION TYPE

The training function type segment significantly outpaces the testing segment in the global e-learning market share, driven by several compelling factors. E-learning has become an essential component of modern education and professional development. The training segment of e-learning focuses on delivering educational content through various digital platforms. This includes live lectures, recorded sessions, interactive modules, and supplementary materials designed to provide learners with the necessary knowledge and skills for specific subjects. Further, the need for skill development, cost efficiency, technological innovations, corporate investment, and employee retention fuels the rising demand for e-learning training. These factors collectively drive the training function's substantial growth and market dominance in the e-learning sector.

Segmentation by Function Type

- Training
- Testing

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INSIGHTS BY DELIVERY TYPE

The global e-learning market by delivery mode is segmented into blended learning, packaged content, web-based learning, and mobile learning. The blended learning segment is witnessing substantial growth compared to other delivery methods, driven by its integration of traditional and digital learning approaches. The segment growth is fueled by the segment's ability to offer flexible, personalized learning experiences that combine the benefits of face-to-face instruction with the convenience of online modules. Blended learning enhances learner engagement and academic performance and provides cost-efficient solutions, reducing training expenses by up to 40%. Additionally, the rising adoption by corporates and educational institutions underscores the segment's effectiveness in meeting diverse educational needs and driving significant improvements in learning outcomes.

Segmentation by Delivery Mode

- Blended Learning
- Packaged Content
- Web-based Learning
- Mobile Learning
- Others

INSIGHTS BY CONTENT TYPE

The text-based content type segment holds the most prominent share of the global e-learning market in 2023. The segment is experiencing notable growth compared to other content types, driven by its foundational role in delivering structured and accessible learning materials. Also, the segment growth is attributed to the segment's simplicity, cost-effectiveness, and ease of integration into various e-learning platforms. Text-based content remains essential for providing clear, concise information and is widely used in instructional materials, online courses, and assessments. The reliability and accessibility of text-based content make it a preferred choice for educational institutions and corporate training programs despite the growing interest in multimedia and interactive formats. This sustained preference highlights the enduring importance of text-based content in meeting diverse learning needs and supporting effective knowledge transfer.

Segmentation by Content Type

- Text-Based Content
- Multimedia Content
- Interactive Content

INSIGHTS BY TECHNOLOGY TYPE

The global e-learning market by technology type is segmented into learning management systems, mobile e-learning, virtual classrooms, and simulation-based learning. The learning management system (LMS) segment is experiencing substantial growth, outpacing other technology types, and emerged as a dominant segment in 2023. The increasing adoption of LMS solutions across various sectors, including corporates, educational institutions, and government organizations, drives segmental growth. LMS platforms offer centralized, scalable solutions for managing, delivering, and tracking educational content, making them crucial for streamlining training and development programs. Integrating advanced features such as artificial intelligence, analytics, and mobile accessibility has fueled the demand for LMS, providing enhanced user experiences and actionable insights into learner progress. This trend underscores the LMS segment's pivotal role in supporting effective and efficient e-learning strategies.

Segmentation by Technology Types

- Learning Management System

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- Mobile E-Learning
- Virtual Classroom
- Simulation-Based Learning
- Others

GEOGRAPHICAL INSIGHTS

North America leads the global e-learning market, accounting for a global share of over 36% in 2023. The region's growth is bolstered by its advanced infrastructure, cutting-edge technology, and high internet penetration, which have facilitated the widespread adoption of e-learning solutions. The region is home to numerous prominent e-learning companies and prestigious educational institutions, fueling market growth. Additionally, the emphasis on upskilling and reskilling to meet the evolving needs of the job market fuels the adoption of e-learning. Educational institutions and businesses invest in e-learning solutions to enhance learning experiences, improve engagement, and deliver customized content. In contrast, the Asia-Pacific (APAC) is the fastest-growing region in the global e-learning market, driven by significant technological advancements, expanding internet access, and an increasing demand for skill development. These factors have accelerated the adoption of e-learning solutions across diverse sectors such as education, healthcare, and information technology.

Segmentation by Geography

- North America
 - o□ The U.S.
 - o□ Canada
- Europe
 - o□ The U.K.
 - o□ Germany
 - o□ France
 - o□ Italy
 - o□ Spain
 - o□ Netherlands
 - o□ Sweden
 - o□ Poland
 - o□ Belgium
 - o□ Nordic
 - o□ Benelux
 - o□ Rest of Europe
- APAC
 - o□ China
 - o□ India
 - o□ Japan
 - o□ South Korea
 - o□ Australia
 - o□ Indonesia
 - o□ Malaysia
 - o□ Vietnam
 - o□ Thailand
 - o□ Philippines
 - o□ Rest of APAC
- Latin America

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- o South Africa
- o Turkey
- o Egypt
- o Israel
- o Nigeria
- o Rest of the Middle East & Africa

COMPETITIVE LANDSCAPE

The global e-learning market is highly competitive and characterized by numerous players. These players constantly strive to gain a larger market share by introducing new and innovative products and services. Key players in the global e-learning market include Coursera, Udemy, LinkedIn Learning, Pluralsight, and edX. These players offer various courses and certifications across various domains, catering to different learning needs. Furthermore, vendors also have to track new entrants' pricing continuously. At the same time, price-based competition is not recommended; attractive prices can detract buyers, and innovation and product development must be effectively mitigated. Achieving scale is another challenge that can be addressed only by gaining a reasonable degree of popularity.

Key Company Profiles

- Adobe
- Aptara
- Apollo Education Group
- Articulate Global, LLC
- Blackboard
- British Council
- CERTPOINT
- Citrix Systems Inc
- Learning Pool
- NIIT
- Oracle
- Pearson
- SAP SE
- Skillsoft
- Tata Interactive Systems

Other Prominent Vendors

- Cisco
- Instructure

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- []Estacio
- []Coursera
- []Litmos
- []Open Education
- []Veduca
- []LinkedIn (Microsoft)
- []Simplilearn
- []Think & Learn (BYJU?S)
- []upGrad
- []LeQuest
- []FutureLearn
- []Learn To Play
- []Chegg
- []Bright Little Labs
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- []WhiteHat Security
- []Blinkist
- []Age of Learning
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- []DataCamp
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- []Thinkific
- []Duolingo
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- []TalentLMS
- []iSpring Solutions
- []Ruzuku
- []Kajabi
- []WizIQ
- []Xyleme
- []Cognitia
- []Socratic
- []Go1
- []Elliot
- []Noodle
- []eFront
- []Pathwright
- []ProProfs
- []EduMe
- []Mindflash
- []Gnowbe
- []Vubiz
- []Saba Cloud
- []Kaltura
- []Loom
- []Mosaic

KEY QUESTIONS ANSWERED:

- 1.[]How big is the e-learning market?
- 2.[]What is the growth rate of the global e-learning market?
- 3.[]Who are the key players in the global e-learning market?

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- 4.□What are the significant trends in the e-learning market?
- 5.□Which region dominates the global e-learning market share?

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