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Learning Management System Market by Offering (Solutions, Services), Delivery Mode (Distance Learning, Instructor-led Learning, Blended Learning), Deployment Type, Organization Size, Application Area, User Type and Region - Global Forecast to 2028

https://marketpublishers.com/r/L562035F469EN.html
Date: February 2024
Pages: 370
Price: US$ 7,150.00 (Single User License)
ID: L562035F469EN

Abstracts

The LMS market is expected to grow from USD 22.1 billion in 2023 to USD 51.9 billion by 2028 at a Compound Annual Growth Rate (CAGR) of 18.6% during the forecast period. Growing demand for virtual online training and incorporating advanced technologies for a better training environment offers opportunities for the LMS market. The need for technical training for teachers and instructors and the lack of learning management systems with multi-language support are significant challenges in the growth of the LMS market.

“As per application area, the corporate training & development segment is expected to grow at a higher CAGR during the forecast period. “

Corporate training and development represent a critical application area within the LMS market, catering to the evolving needs of organizations to enhance employee skills, productivity, and overall performance. LMS platforms are central hubs for delivering comprehensive training programs, from onboarding and compliance training to leadership development and continuous skills enhancement initiatives. These platforms allow organizations to create, manage, and provide diverse training content, including interactive courses, videos, simulations, and assessments tailored to meet specific learning objectives and employee skill requirements. Moreover, corporate training and development in LMS solutions extend beyond traditional classroom-style learning to encompass blended learning approaches, integrating various learning modalities such as eLearning modules, Virtual Instructor-Led Training (VILT), and on-the-job training

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experiences. This flexibility allows organizations to cater to their workforce's diverse learning preferences and schedules, fostering engagement and maximizing knowledge retention.

"As per organization size, large enterprises to hold largest market share in 2023."

Large enterprises are pivotal in shaping the LMS market due to their significant influence, substantial resources, and complex training needs. These organizations often operate globally with diverse workforce demographics spanning multiple departments, locations, and business units. As such, large enterprises require robust LMS solutions capable of accommodating their vast training requirements, including employee onboarding, compliance training, professional development, and ongoing skills enhancement initiatives. Moreover, large enterprises prioritize scalability, seeking LMS platforms that can seamlessly scale to support thousands or tens of thousands of users across various organizational hierarchies and job roles. Customization is another critical aspect for large enterprises, as they often require tailored features, branding options, and integrations with existing enterprise systems to align the LMS with their unique corporate culture, training objectives, and business processes.

"As per region, Europe will witness the second-largest market share during the forecast period."

Despite a dynamic regulatory environment, Europe has experienced significant economic growth in recent years. This growth is due to the rising expectations of regional companies to improve their business efficiency by saving time and money. As a result, several major US-based learning management system companies have expanded in the region to build a strong clientele and establish a base of operations overseas. Similarly, regional technology providers collaborate with global learning management system providers to maintain a competitive edge, retain existing customers, and attract new ones. This region's IT and telecommunications sector is expected to grab the largest market share, with the region leading in 5G deployment. Telecom operators in Europe and the US are expected to spend USD 185 billion by 2026. The LMS market in Europe included economies like the UK, Germany, France, Italy, Spain, Russia, the Nordic Countries, and the Rest of Europe. Countries such as the UK and France are progressing swiftly with intelligent and connected devices, which will facilitate the implementation of learning management applications. The region is experiencing significant adoption of learning management solutions across enterprises and academic institutions to improve productivity and engagement among students within organizations.

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The breakup of the profiles of the primary participants is below:

By Company: Tier I: 35%, Tier II: 25%, and Tier III: 40%

By Designation: C-Level Executives: 22%, Director Level: 33%, and Others: 45%

By Region: North America: 42%, Europe: 25%, Asia Pacific: 18%, Rest of World: 15%

Note: Others include sales managers, marketing managers, and product managers

Note: The rest of the World consists of the Middle East & Africa, and Latin America

Note: Tier 1 companies have revenues of more than USD 100 million; tier 2 companies' revenue ranges from USD 10 million to USD 100 million; and tier 3 companies' revenue is less than 10 million

Source: Secondary Literature, Expert Interviews, and MarketsandMarkets Analysis

Some of the significant vendors offering LMS solutions and services across the globe include Anthology (US), Moodle (Australia), Cornerstone OnDemand (US), D2L Corporation (Canada), Instructure Inc. (US), PowerSchool (US), IBM (US), Infor (US), Adobe (US), LTG (UK), Google (US), Oracle (US), SAP (Germany), Docebo (Canada), Learning Pool (UK), Absorb LMS (Canada), CrossKnowledge (France), BizLibrary(US), iSpring (US), Blue Sky eLearn (US), Trakstar (US), DigitalChalk (US), Touvti LMS (US), SkyPrep (Canada), Talent LMS (US), Acorn LMS (Australia), and LearnWorlds (Cyprus).

Research coverage:

The market study covers the LMS market across segments. It aims to estimate the market size and the growth potential of this market across different market segments, such as offering, delivery mode, organization size, deployment type, application areas, user type, and region. It includes an in-depth competitive analysis of the key players in the market, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

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Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall LMS market and the 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. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (increasing adoption and proliferation of the eLearning industry, need for efficient and accessible learning, effective management of learners and education content, increased focus of enterprises on human capital development, growing adoption of cloud-based learning management system platforms, increased need for skill-based and objective-driven learning), restraints (lack of performance tracking and measuring RoI, and reluctance of enterprises to convert existing training content into microcontent) opportunities (growing demand for virtual online training, and incorporation of advanced technologies for better training environment), and challenges (need for technical training for teachers and instructors, lack of control of educational institutes over learning processes, lack of learning management system with multi-language support, and absence of momentum and communication among employees) influencing the growth of the LMS market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the LMS market.

Market Development: Comprehensive information about lucrative markets – the report analyses the LMS market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the LMS market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players Anthology (US), Cornerstone

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OnDemand (US), D2L Corporation (Canada), Instructure Inc. (US), PowerSchool (US), Adobe (US), LTG (UK), Google (US), Oracle (US), SAP (Germany), Docebo (Canada), among others in the LMS market.

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About

The LMS market for academic users is segmented into K-12 and higher education. Universities and educational institutions are leveraging on the cutting-edge developments in the education technology to engage students, expand their global footprints, and avoid campus overcrowding. Selection and implementation of LMS is becoming more strategic and a considerable part of the education IT spending is being utilized for it.

The market share for K-12 users is estimated to grow from XX% in 2013 to XX% in 2018.

NA has been leading the adoption of LMS. Most of the competition in the LMS market comes from this region as more than XX% of LMS providers target the NA market. With saturation in the LMS market for enterprises in the NA region, rapid adoption by SMBs is likely. The LMS market is expected to proliferate with SaaS deployment model becoming the de-facto approach for LMS.

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