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Latin America E-Learning Market - Industry Outlook and Forecast 2018-2023

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Abstracts

This market research report on Latin America e-learning market offer analysis on market size & forecast, market share, industry trends, growth drivers, and vendor analysis. The market study also includes insights on segmentation by delivery mode (packaged content, LMS, and others), by learning mode (self-paced and instructor-led), by type (training and testing), by end-user (K-12, higher education, corporates, government, and vocational), and by countries (Brazil, Mexico, Argentina, Chile, Colombia, Peru, Bolivia, Uruguay, and Ecuador).

Latin America E-Learning Market - Overview

The recent trend of globalization, talent migration, and consistent improvements in corporate competencies and individual talent grooming are some of the key factors attributing to the growth of the Latin America e-learning market. Government initiatives to set-up sophisticated learning systems is encouraging the migration of many global players to the Latin American market. The accommodation of learning needs for all types of students, easy repetition of any lecture, access to updated and real-time content, and hassle free tuition delivery are some of many advantages of adopting e-learning methodology in the Latin American market. The increasing mobility of human capital in industries, including tourism, trade, media, international relations, and science and technology is creating the demand for these services in the Latin American market. The vendors are leveraging internet as an effective tool, enabling successful learning across various end-user segments in an engaging and cost-effective manner. The widened scope of content delivery that includes interactive learning platforms, language training, functional skill development, proficiency testing, and higher education pedagogy, video streaming of classes to corporate training, talent management, and e-governance is transforming the market. The emergence of software applications such

as LMS will boost revenues in the Latin America e-learning market.

The incorporation of cloud-based learning, AR, VR, and mobile-based learning applications is modernizing the content delivery models available in the Latin American market. The introduction of blended learning, which incorporates both off-line and online pedagogy will enhance the efficiency of instruction at minimal costs and drive demand in the market. The Latin America e-learning market is expected to generate revenues of over $3 billion by 2023, growing at a CAGR of more than 4% during 2018-2023.

Latin America E-Learning Market - Dynamics
The increasing adoption of mobile and portable devices is augmenting the growth of the Latin America e-learning market. The increasing use of mobile platforms offers end-users the ease of connectivity and continuous news feeds, peer-to-peer challenges, flashcards and content collaboration. The rising number of smartphones and success of social media channels across Latin America is enabling the success of audio and text-based applications in the market. The content creators are now able to add bite-sized lessons and deploy learning modules to mobile applications to ensure regular participation among students and teachers in the Latin American market. The emergence of new education paradigms to promote hybrid and online learning through social media platforms will help companies reach a wider group of consumers and gain a larger market share. Furthermore, the adoption of cloud-based applications and services will enable accessibility to information on a real-time basis from remote locations. The use of these technologies will facilitate networking and create collaborative environments and platforms in the Latin America e-learning market.

Latin America E-Learning Market - Segmentation
This market research report includes a detailed segmentation of the market by delivery mode, learning mode, type, end-users, and countries.

Latin America E-Learning Market – By Delivery Mode
LMS and gamified modules promote demand for new modules in the Latin America e-learning market during the forecast period

The Latin America e-learning market by delivery mode is segmented into packaged content, LMS, and others. Packaged content segment dominated over half of the market share in 2017, growing at a CAGR of more than 3% during the forecast period. Factors such as content sourcing, aggregation, and mode of interaction is propelling the growth of this segment in the Latin American market. The process of packaging content includes raw content, assembly, and delivery and presentation information. The ease of

delivering packaged content with no time and space constraint is boosting the popularity of this model in the Latin American market. This module is designed to save time by not traveling and reaching students even in the remote locations. Packaged content is much cheaper, students and professionals can learn from anywhere at 30-70% less cost than on campus. Such effectiveness is fueling the demand for this module in the Latin America market.

Latin America E-Learning Market – By Learning Mode
Vendors are leveraging technology to innovate self-paced modules in the Latin America e-learning market

The learning mode segment in the Latin America e-learning market is classified into self-paced and instructor-led. Self-paced segment occupied more than 3/4th of the market share in 2017, growing at a CAGR of approximately 4% during the forecast period. The growing preference for continuous learning and scaling new career opportunities for employees in the corporate sector is contributing to the adoption of this module in the Latin American market. The use of innovative technology will enable corporates to access the content at any time and from anywhere across the region. Countries such as the Dominican Republic, Honduras, El Salvador, Peru, Bolivia, Ecuador, Guatemala, Colombia, Brazil, and Chile are the largest users of self-paced learning in the Latin American market. The use of innovative technology to deliver learning modules will augment the growth of this segment in the Latin America e-learning market. Aura Interactiva, Competir, and AXG Tecnonexo are some of the pan-regional level distributors in the Latin American market.

Latin America E-Learning Market – By Type
Digitalization of content to boost the requirement for training in the Latin America e-learning market

The Latin America e-learning market by type is divided into training and testing. The training segment dominated the majority of the market share in 2017, growing at a CAGR of around 4% during the forecast period. The introduction of digitalized courses and content along with LMS systems and MOOCs that enable access to a large pool of learning content is propelling the need for e-training classes in the Latin American market. The Latin American training segment is witnessing an influx of professional, governmental-related, and academic modules which is driving the need for these services. The training modules include providing information regarding certain processes and day-to-day operations in an online environment. The different methods for e-training include speeches, videos, text documents, demonstrations, and other

materials. Focus on skill development will lead to the demand for effective training in the Latin America market.

Latin America E-Learning Market – By End-Users
Gamification of modules for K-12 end-users will transform the Latin America e-learning market during the forecast period

The end-user segment in the Latin America e-learning market is categorized into K-12, higher education, corporates, government, and vocational. K-12 was the largest end-users, occupying the majority market share in 2017 and growing at a CAGR of around 3% during the forecast period. The modernization and use of varied applications of new technologies in the K-12 sector is propelling the growth of the Latin American market. The increasing use of products and solutions for digital publishing incorporated by digital technologies is fueling the need for sophisticated learning modules in this segment in the market. The increasing implementation of mobile devices and gamification tools will revolutionize the K-12 segment in the Latin America e-learning market during the forecast period. All online players in this market are rethinking their offerings to be a major player an education technology plays an important and strategic role in changing from textbooks to e-books in the Latin American market.

Latin America E-Learning Market – By Countries
Smartphones to drive the demand in Brazil and boost revenues the Latin America e-learning market during the forecast period

The Latin America e-learning market by geography is segmented into Brazil, Mexico, Argentina, Chile, Colombia, Peru, Bolivia, Uruguay, and Ecuador. Brazil dominated the largest market share in 2017, growing at a CAGR of around 1% during the forecast period. Brazil is the fifth largest higher education market in the world and the largest in Latin America. The growing need for corporate and vocational courses is driving the growth of this region in the Latin American market. The rising number of smartphones and growing internet penetration is driving the growth of the market in Brazil. The launch of the PROINFO program in 2007 promotes installations of computer and related technology labs in public elementary and high schools, laptops for teachers and students, digital boards, projectors, and tablets. Such initiative by the government will augment the development of Brazil in the Latin America e-learning market.

Key Vendor Analysis

The Latin America e-learning market is witnessing the development of new technologies and platforms by several vendors to sustain the competition in the market. The top players are offering highly customizable platforms that can enable instructors to customize content dynamically as per the student's requirements to gain a larger market share. The increasing number of strategic mergers and acquisitions will intensify the competition levels in the Latin America e-learning market over the next few years. The vendors are focusing on providing freemium offerings with attractive short-term subscription pricing to boost these revenues in the market. The increasing investment in the development of gamified and contextualized interfaces will transform the Latin American market during the forecast period.

The major vendors in the Latin America market are:

Kroton

Telefonica

Pearson

BlackBoard

Other prominent vendors include Instructure, D2L, edX, English Attack, Estacio, Coursera, Latitude, Litmos, Open English, Veduca, Skillsoft, Docebo, McGraw-Hill, Aptara, Edmodo, Cengage Learning, Macmillan Education, and Cornerstone OnDemand.

Key market insights include

1. The analysis of Latin America e-learning market provides market size and growth rate for the forecast period 2018-2023.
2. It offers comprehensive insights into current industry trends, trend forecast, and growth drivers about the Latin America e-learning market.
3. The report provides the latest analysis of market share, growth drivers, challenges, and investment opportunities.
4. It offers a complete overview of market segments and the regional outlook of Latin America e-learning market.
5. The report offers a detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

Report Snapshot

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The Latin America e-learning market size is expected to generate revenues of over $3 billion by 2023, growing at a CAGR of more than 4% 2018–2023.

The Latin America e-learning market is driven by the thriving domestic consumption and rising associated new opportunities. The countries such as Argentina, Brazil, Chile, Colombia, and Mexico are the largest revenue generators in the Latin American market. The market research report provides in-depth market analysis and segmental analysis of the Latin America market by delivery mode, learning mode, type, end-users, and countries.

Base Year: 2017
Forecast Year: 2018–2023

The study considers the present scenario of the Latin America E-learning market and its market dynamics for the period 2018?2023. It covers a detailed overview of various market growth enablers, restraints, and trends. The market study covers both the demand and supply sides of the market. It profiles and analyzes the leading companies and other prominent companies operating in the market.

Major Vendors in the Latin America E-Learning Market

Kroton

Business Overview

Kroton in the Latin America Market

Major Product Offerings

Key Strategies

Key Strengths

Key Opportunities

Telefonica

Pearson

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BlackBoard

Prominent Players in the Latin America E-Learning Market

Instructure

Business Overview

D2L

edX

English Attack

Estacio

Coursera

Latitude

Litmos

Open English

Veduca

Skillsoft

Docebo

McGraw-Hill

Aptara

Edmodo

Cengage Learning

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Macmillan Education

Cornerstone OnDemand

Market Segmentation by Delivery Mode

Packaged Content

LMS

Others

Market Segmentation by Learning Mode

Self-Paced

Instructor-Led

Market Segmentation by Type

Training

Testing

Market Segmentation by End-users

K-12

Higher Education

Corporates

Government

Vocational

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Market Segmentation by Countries

Brazil

Mexico

Argentina

Chile

Colombia

Peru

Bolivia

Uruguay

Ecuador

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