

# Digital English Language Learning Market Report by Deployment Mode (On-premises, Cloud-based), Business Type (Business-to-Business (B2B), Business-to-Consumer (B2C)), End User (Non-academic Learners, Academic Learners), and Region 2024-2032

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## Abstracts

The global digital English language learning market size reached US\$ 6.8 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 22.2 Billion by 2032, exhibiting a growth rate (CAGR) of 13.67% during 2024-2032. The market is growing rapidly driven by globalization and increasing demand for English language proficiency, significant technological advancements, unparalleled accessibility and flexibility of digital platforms, increasing awareness about the cost-effectiveness of digital platforms, and rising adoption of e-learning in the education sector.

Digital English Language Learning Market Analysis:

**Market Growth and Size:** The market is witnessing stable growth, driven by rising demand for English proficiency in personal and professional contexts. Additionally, the increasing adoption of technology in the education industry is boosting the market growth.

**Major Market Drivers:** Key drivers influencing the market growth include globalization and the need for English in international communication, particularly in business and education sectors. Furthermore, the rapid technological advancement and heightened awareness regarding the accessibility, flexibility, and cost-effectiveness of digital platforms is driving the market growth.

**Technological Advancements:** Recent innovations in artificial intelligence (AI) and speech recognition that offer personalized and interactive experience are supporting the

market growth. Additionally, the proliferation of mobile technology and app-based learning platforms is acting as another growth-inducing factor.

**Industry Applications:** The market serves a wide range of users, from individual learners to educational institutions and businesses seeking to enhance employees' language skills. Additionally, digital platforms are being integrated into school and university curricula, and corporate training programs.

**Key Market Trends:** The key market trends involve the ongoing shift towards cloud-based solutions due to their scalability, cost-effectiveness, and ease of access.

Additionally, the personalization and gamification of learning content is supporting the market growth.

**Geographical Trends:** Asia Pacific leads the market due to economic development and educational reforms emphasizing English proficiency. Other regions are also showing significant growth, fueled by immigration and professional development needs.

**Competitive Landscape:** The market is highly competitive with key players focusing on technological innovation, expanding product offerings, and strategic partnerships.

Additionally, they are emphasizing on global expansion and localization to cater to diverse linguistic and cultural needs.

**Challenges and Opportunities:** The market faces various challenges, such as addressing diverse learner needs, data privacy concerns, and keeping pace with rapid technological changes. However, rapid expansion into emerging markets and the development of adaptive learning technologies are creating new opportunities for the market growth.

#### Digital English Language Learning Market Trends:

Rapid globalization and increasing demand for English language proficiency

Globalization is playing a pivotal role in amplifying the demand for English language proficiency across the globe. In line with this, digital English language learning platforms cater to a diverse audience, ranging from professionals seeking career advancement to students aiming for educational opportunities abroad. Furthermore, the widespread demand for English proficiency in multinational corporations, international collaborations, and global trade negotiations is contributing to the market growth.

Additionally, the growing number of international conferences, symposiums, and seminars conducted in English, requiring participants to be proficient in the language, is supporting the market growth. Moreover, the emerging trend of learning English in non-native English-speaking countries to unlock global opportunities is favoring the market growth.

Significant technological advancements

Cutting-edge technologies like artificial intelligence (AI), machine learning (ML), and advanced speech recognition are revolutionizing the way language is taught and learned. AI and ML algorithms offer personalized learning experiences by adapting to individual skill levels and learning styles, which ensures that learners are neither overwhelmed nor under-challenged, fostering a more effective and engaging learning environment. Furthermore, speech recognition technology allows for real-time pronunciation correction, a critical feature for mastering a new language. Additionally, the integration of virtual and augmented reality (VR/AR) in language learning, which immerses learners in realistic, interactive environments, making learning more engaging and effective, is boosting the market growth. Moreover, the availability of big data analytics, enabling educators and developers to understand learning patterns and outcomes, is driving the market growth.

#### Unparalleled accessibility and flexibility of digital platforms

The surge in demand for digital English language learning, owing to its unparalleled accessibility and flexibility, is bolstering the market growth. Digital platforms enable learners to access a wide range of resources, including interactive lessons, video tutorials, and live tutoring sessions, all from the convenience of their devices. This flexibility is highly beneficial for individuals with busy schedules, such as working professionals and students, who might find it challenging to attend traditional language classes. Moreover, digital learning platforms cater to a diverse range of learning styles and proficiency levels, making English language learning more inclusive. Besides this, their flexibility not only makes them more adaptable to individual lifestyles but also allows for a more consistent and uninterrupted learning journey.

#### Increasing awareness about the cost-effectiveness of digital platforms

The cost-effectiveness of digital platforms is a significant factor driving the market growth. Digital learning platforms offer more affordable solutions without compromising on quality. They eliminate the need for physical materials like textbooks and workbooks, reducing production and distribution costs. Additionally, digital platforms often employ scalable technology, allowing them to serve a large number of users without a corresponding increase in expenses. This scalability translates into lower costs for learners, making English language education more accessible to a broader audience. Besides this, many digital English language learning platforms offer a range of pricing options, such as free basic versions and premium subscriptions, catering to different budgets and learning needs. Furthermore, the lifetime access and continuous updates

provided by many digital platforms ensure that learners receive long-term value from their investments.

### Rising adoption of e-learning in the education sector

The integration of digital English language learning tools into educational curricula is a significant factor driving the market growth. This trend is largely fueled by the recognition of English proficiency as a critical skill in the job markets across the globe. Educational institutions, such as schools and universities, are increasingly acknowledging the importance of English in preparing students for a competitive international environment. In line with this, digital learning tools offer an innovative approach to language education. They incorporate interactive elements, such as quizzes, games, and continuous feedback, making learning more engaging and effective compared to traditional methods. Furthermore, they often include adaptive learning technologies, which personalize the learning experience to each student's proficiency level and learning pace, ensuring more efficient progress.

### Digital English Language Learning Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on deployment mode, business type, and end user.

### Breakup by Deployment Mode:

- On-premises
- Cloud-based

Cloud-based accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the deployment mode. This includes on-premises and cloud-based. According to the report, cloud-based represented the largest segment.

Cloud-based deployment represents the largest market share, as it offers unparalleled accessibility, allowing learners to access content from any device with internet connectivity, such as a smartphone, tablet, or computer. Additionally, cloud-based platforms are highly scalable, making it easier for providers to accommodate a large number of users without significant increases in cost or drops in performance. This scalability is essential in catering to the diverse and growing global audience seeking

English language skills. Furthermore, cloud-based platforms often come with lower upfront costs compared to on-premises solutions, as they typically operate on a subscription model.

On-premises deployment caters to users who prefer or require their learning resources to be hosted on local servers. Its primary advantage is enhanced control over data and security. Furthermore, on-premises solutions offer a higher degree of protection since the data is stored within the user's own IT infrastructure. It is particularly critical for organizations with stringent data security policies or those operating in regions with specific data residency requirements.

#### Breakup by Business Type:

Business-to-Business (B2B)

Business-to-Consumer (B2C)

A detailed breakup and analysis of the market based on the business type have also been provided in the report. This includes business-to-business (B2B) and business-to-consumer (B2C).

The business-to-business (B2B) segment caters to the needs of organizations, such as corporations, educational institutions, and government agencies. It offers customized language learning solutions tailored to meet specific organizational objectives. Furthermore, the B2B segment emphasizes the development of specialized content that aligns with the professional or academic requirements of the clients.

The business-to-consumer (B2C) segment is characterized by its focus on personal language learning goals, such as travel, personal enrichment, immigration, or self-improvement. Its offerings are generally standardized and designed to cater to a broad audience with diverse learning needs and backgrounds. Furthermore, the content in B2C platforms often includes a wide range of topics, like basic vocabulary, grammar, and advanced conversation skills, catering to various proficiency levels.

#### Breakup by End User:

Non-academic Learners

Academic Learners

Non-academic learners represent the leading market segment

The report has provided a detailed breakup and analysis of the market based on the end user. This includes non-academic learners and academic learners. According to the report, non-academic learners represented the largest segment.

The non-academic learners segment holds the largest market share, encompassing a diverse group of individuals seeking English proficiency for various personal and professional reasons outside of a formal academic setting. It includes professionals aiming to enhance their career prospects or communicate more effectively in the global business environment, immigrants needing language skills for better integration into English-speaking societies, and individuals pursuing English learning for travel, cultural exploration, or personal interest. Furthermore, the content and structure of digital English language learning platforms catering to this segment are typically flexible and practical, focusing on conversational skills, business English, day-to-day communication, and real-world scenarios.

The academic learners segment comprises students and individuals engaged in formal education, ranging from school-aged children to university students. It focuses on English language learning to meet academic requirements, prepare for standardized English proficiency tests, or pursue higher education in English-speaking countries. Moreover, digital English learning tools for this segment are typically structured to align with academic curricula and test preparation needs.

#### Breakup by Region:

- North America
  - United States
  - Canada
- Asia Pacific
  - China
  - Japan
  - India
  - South Korea
- Australia
- Indonesia
- Others
- Europe
  - Germany
  - France



United Kingdom  
Italy  
Spain  
Russia  
Others  
Latin America  
Brazil  
Mexico  
Others  
Middle East and Africa

Asia Pacific leads the market, accounting for the largest digital English language learning market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

The Asia Pacific region represents the largest market share due to its large population base and rapid economic growth. Additionally, the increasing emphasis on English proficiency for business, education, and global communication in the region is contributing to the market growth. Besides this, the growing middle class with a strong desire for English language skills to enhance career opportunities and access international markets is catalyzing the market growth. Furthermore, the ongoing educational reforms and government initiatives in many Asia Pacific countries, which emphasize English proficiency, are further fueling the market growth.

In North America, the digital English language learning market is driven by factors like immigration, the need for professional development, and the integration of language learning in educational systems. Additionally, the presence of multinational corporations and the emphasis on global business communication is contributing to the market growth. Besides this, the growing trend of incorporating digital English language learning tools in schools and universities to enhance students' language skills is driving the market growth.

The digital English language learning market in Europe is marked by the region's

multilingual nature and the importance of English as a second language. Besides this, the European Union's emphasis on multilingual education and the mobility of students and professionals within the region, creating a strong demand for English language proficiency, is bolstering the market growth.

The digital English language learning market in Latin America is growing, driven by the region's increasing integration with the global economy and the recognition of English as a key skill for economic advancement. Furthermore, the growing demand for English language proficiency among both the young population and working professionals is contributing to the market growth.

The digital English language learning market in the Middle East and Africa is emerging, owing to several factors, such as increasing urbanization, rising youth population, and the expansion of internet and mobile connectivity. Furthermore, regional countries are focusing on diversifying their economies and increasing their global presence, which has heightened the importance of English language proficiency.

**Leading Key Players in the Digital English Language Learning Industry:**

Major players are investing in research and innovation to integrate advanced technologies like AI, ML, and natural language processing (NLP) into their platforms to enhance the learning experience by providing personalized learning, real-time feedback, and interactive content. Additionally, leading companies are expanding their product range to cater to different market segments. It includes developing specialized courses for different age groups, professional sectors, and proficiency levels, as well as expanding into new areas like business English or test preparation courses. Moreover, they are forming partnerships with educational institutions, corporations, and governments to help in content development, expanding reach, and creating customized solutions for specific markets or sectors.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

51Talk English International Inc.  
Berlitz Corporation  
Busuu (Chegg Inc.)  
EF Education First Ltd.  
Inlingua International Ltd.  
Lingoda GmbH



Pearson plc  
Preply Inc.  
Rosetta Stone Inc. (IXL Learning Inc.)  
Sanako  
VIPKid  
Voxy Inc.  
Yabla Inc.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

#### Latest News:

In July 2023, Berlitz Corporation was recognized by Microsoft for its use of AI to improve language learning.

In November 2023, Busuu launched AI-powered web and mobile applications to assist in learning languages faster and more effectively.

In July 2020, EF Education First announced major investment from Permira to expand EF kids & teens online learning and school network in China.

#### Key Questions Answered in This Report:

How has the global digital English language learning market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global digital English language learning market?

What is the impact of each driver, restraint, and opportunity on the global digital English language learning market?

What are the key regional markets?

Which countries represent the most attractive digital English language learning market?

What is the breakup of the market based on the deployment mode?

Which is the most attractive deployment mode in the digital English language learning market?

What is the breakup of the market based on the business type?

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