

Cloud-Based Learning Management System Market – Global Drivers, Opportunities, Trends, and Forecasts to 2022

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Abstracts

Overview

The advancements in technology, rising use of mobile devices, and internet penetration have transformed the world of learning and development. Although traditional classrooms and face to face interaction are still prevalent, there is a rising number of schools, universities, and enterprises opting to train and inform the learners via the web. The acquisition of Lynda.com by LinkedIn and \$135 million of funds raised by Pluralsight can perfectly explain the booming online learning industry.

Product Analysis

LMS is one of the most impactful types of business tool and is revolutionizing the way people learn as an employee or as a student. With its availability on the cloud, the products and solutions are now cost effective and relevant to wider sections of society, institutions, and organizations. Modern cloud-based LMS are rich in functionalities and have relatively better integration capabilities. At present, with the availability of new vendors and better capabilities, the enterprises and institutions are reviewing their traditional LMS and are likely to switch to the cloud-based LMS.

Market Analysis

LMS has a significant number of users in academics & education industry, followed by IT organizations. In addition, the system has found applications in several sectors and sub-sectors such as manufacturing, healthcare, event management, NGOs, real estate, public agencies, software development, digital marketing agencies, and various others.

For instance, healthcare and manufacturing sectors utilize LMS to get rid of regulatory burdens, while consulting firms use it for onboarding, training, and certification. The cloud-based LMS has already gained popularity, with the majority of the end-users already moved to a hosted learning platform.

Technology Analysis

A right e-learning standard is necessary to make the learning content, available from various vendors, agile with the LMS. Course authors develop content in a certain modality and are required to pack the file as per the standard. Several standards have been developed so far for the packaged learning content. Major standards are SCORM, AICC, xAPI/Tin Can, LTI, and Cmi5. The demand is for high integrational capabilities and high customization & personalization. The present modern LMS boasts all the necessary features and is still evolving. The users are now required to be aware of the entire product and its true value.

Key Players

There are several major players in the online learning industry such as Adobe, Blackboard, Educomp, Desire2Learn, Cisco, Smart Technologies, Three River Systems, Scholastic, and Intel. The key players in the cloud-based LMS market are Instructure, Cornerstone OnDemand, SAP, Blackboard, D2L, Docebo, and Litmos. Few of the players are established LMS vendors and are moving their business towards SaaS based model of LMS.

Competitive Analysis

The LMS market constitutes several major vendors and hundreds of SMEs. In higher education, the majority of the LMS market is held by Blackboard, Canvas, and Moodle. While in the corporate market, four largest vendors holding the market are SAP SuccessFactors, Voniz, Saba Software, and SumTotal Systems. With the advent of hosted solutions, vendors are now focusing more on the development and sales of cost-effective cloud-based learning platforms. The market has also attracted several new entrants, and the number of players in the market has crossed more than 500. However, most of the share would still go to major players as existing customers are likely to stick to their vendors. Cost and features are certainly going to play a major role in the success in the market.

Regional Analysis

North America holds the largest share in the cloud-based LMS market. The wide presence of major cloud vendors is driving the cloud-based solutions in North America. The market has a slow growth rate. Asia Pacific is next in line to the share and registers the highest growth rate. The developing economies such as China and India are the major users. The cost benefits are one of the major drivers for the growth of the market. In addition, the rise in the number of mobile device users has led to the trend of mobile learning. Europe is a mature market for LMS; cost benefits of cloud-based LMS are likely to attract the SMEs in Europe. There are still huge opportunities across Southern and Eastern Europe. MEA and Latin America are equally investing in the development of IT infrastructure and e-learning.

Benefits

Cloud-based LMS is more cost effective than an on-premise installed LMS. It does not require any capital expenditure for the purchase of the software. Cloud-based LMS, provided by SaaS vendors, are available for free for a period of 14–30 days. In this period, the users can review the product and make sure it meets the requirements of their organization or institution. Cloud-based LMS is not time-consuming and does not have complex installation process. Maintenance of the software is taken care of by the SaaS vendor. Cloud-based applications on LMS are accessible from any device at any location. A good LMS ensures that the user interface responds perfectly to the size of the screen of the device, which provides flexibility to the learners. Cloud-based LMS possess high configurable features.

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