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Adaptive Learning Market by Component (Platform and Services), Application, Deployment (Cloud and On-premises), End User (Academic (K-12 and Higher Education) and Enterprise (SME and Large Enterprise)), and Region - Global Forecast to 2025

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Abstracts

Rising demand for eLearning solutionsto drivethe market growth

The global adaptive learning market size is projected to grow from USD 1.9 billion in 2020 to USD 5.3 billion by 2025, at a Compound Annual Growth Rate (CAGR) of 22.7% during the forecast period. eLearning helps individuals to gain access to content at any time of the day across the globe. When new innovative tools or practices are launched in the digital technology market space, eLearning helps learners adopt these new changes rapidly and efficiently.

The online education industry is transforming rapidly, and it is evident with the growing adoption of digital learning. In this digital era, most educational institutes and enterprises are widely concentrated on the amplification of the eEducation component with the use of effective adaptive learning solutions. Educational institutes and enterprises further understand the importance of eLearning, as it saves cost, time, and efforts. Adaptive learning solutions allow learners to learn at their own pace throughout a course. This leads to increased levels of satisfaction and course-completion rates and encourages interactions between tutors and learners. It further enables tutors to provide one-to-one instructions and assess the capabilities of the learner seamlessly.

According to the Online Learning Consortium (OLC), more than 90% of learners stated that online learning was better than traditional classroom learning. According to Digital Learning Compass, more than six million students opted for at least one online course

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in 2015. This trend is growing due to continuous improvements in the network infrastructure and the increasing adoption of the Learning Management System (LMS). Massive Open Online Courses (MOOCs) are also gaining popularity among young learners, and more than 1,000 MOOCs have been announced to date. This illustrates an increasing demand for online education. The growing demand for online education is compelling educational institutes and enterprises to invest in adaptive learning platform and services. In the coming years, this ongoing trend of online education and eLearning is expected to drive the growth of the adaptive learning market.

Enterprise segment to grow at higher growth rateduring the forecast period

Organizations and institutions in business domains, apart from the education sector, have been classified as enterprises in the report. Enterprise users include organizations catering to various verticals, such as retail, government, healthcare, and Banking, Financial Services, and Insurance (BFSI). Corporate users implement these solutions as a tool to train and assess employees for providing various instructions and suggestions. Real-time mass notification solutions helpenterprise management to deploy faster communication among its employees about new policies and other instructions. This segment is further classified into Small and Medium-sized Enterprise (SME) and large enterprise on the basis of the number of employees in the organization.

Professional servicessegmentto record a higher market share during the forecast period

Professional services are categorized into three types:consulting, implementation, and support and maintenance. Professional services are mostly post-sales services that are delivered to customers after the purchase of a product. These customized, knowledge-based services being offered to clients fall under the professional services category. Sometimes, new technology solutions must be merged with the existing legacy Information Technology (IT) infrastructures, so that critical applications can be upgraded, and better ways can be implemented to manage and store data. These services constitute an integral part in deploying the solution on-board, imparting training, and handling and maintaining the software. Professional services include solution designing, planning,deploying, and upgrading, and consulting services.

Support and maintenance segment to hold the highest market shareduring the forecast period

Among professional services, support and maintenance services to hold the highest

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market share during the forecast period. Support and maintenance services include the support related to the use of an adaptive learning platform. Customer-focused support systems and teams help organizations reap maximum benefits from their adaptive learning investments. Vendors provide various levels of support and maintenance programs, such as standard and extended support, designed to meet customer needs. These services also include the support provided during pre- and post-installation and maintenance exercises, fundamentally accommodated for data and solution support. Support and maintenance services can be offered from remote locations by means of web conferencing, phones, and ticketing frameworks, or by onsite help.

Asia Pacific to record the highest growth rateduring the forecast period

The APAC region consists of many emerging economies, such as Australia, India, China, Japan, and Singapore. The high adoption rate of new technologies has made this region a lucrative market for the education industry, and due to this, the adaptive learning market in APAC is expected to grow at the highest rate. In addition, countries in the region are taking aggressive initiatives to upsurge their IT infrastructure, enabling commercial users to adopt cutting-edge technologies.

The APAC region emerges as the fastest-growing market for adaptive learning solutions as well. Academic institutions and corporates in the region have started adopting adaptive learning solutions and other eLearning solutions. Vendors are offering a wide range of flexible solutions to provide a continuous learning environment. APAC countries are also considerably contributing to the growth of the adaptive leaning market. The rapid adoption of adaptive learning tools by early adopters in this region has made APAC an attractive market, but the growth is fragmented, and various regional players have specialized offerings making the adaptive learning ecosystem competitive.

The demand for custom eLearning content and technologies is one of the factors driving the APAC adaptive learning market. The region continues to be the largest exporter and consumer of education services. APAC countries differ greatly, some being among the most technologically developed, while others still showing signs of major weaknesses in terms of adopting latest technologies. The lack of technological access in developing nations and lack of knowledge among end users pose barriers that limit the global educational technology providers from entering Asian countries.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, innovation and technology directors, and executives from various key

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organizations operating in the adaptive learningmarket.

By Company Type: Tier 1 – 35%, Tier 2 – 40%, and Tier 3 – 25%

By Designation: C-level – 45%, Directors – 30%, and Managers – 25%

By Region: North America – 40%,Europe– 30%, APAC– 20%,and RoW– 10%

Key players profiled in the adaptive learning market report include McGraw-Hill (US), Pearson (UK), Curriculum Associates (UK), Wiley (US), Istation (US), Area9 Lyceum(US), ScootPad (US), CogBooks (UK), VitalSource (US), DreamBox (US), Impelsys (US), Mathspace (Australia), Fulcrum Labs (US), Knowre (US), Follett (US), Imagine Learning (US), Cerego(US), Realizeit (US), K12 (US), and Houghton Mifflin Harcourt (US). These players have adopted various growth strategies, such as partnerships and new service launches to expand their presence further in the adaptive learning market and broaden their customer base.

Research coverage

The market studycoversthe adaptive learningmarket across different segments. It aims at estimating the market size and the growth potential of this market across by component (platform and services), application, deployment (cloud and on-premises), end user (academic and enterprise), and region. The study also includes an in-depth competitive analysis of the key market players, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key benefits of buying the report

The report is expected to help the market leaders/new entrants in this market by providing them information on the closest approximations of the revenue numbers for the overall adaptive learningmarket and its segments. This report is also expected to help stakeholders understand the competitive landscape and gain insights to improve the position of their businesses and to plan suitable go-to-market strategies. The report also aims at helping stakeholders understand the pulse of the market and provide them with information on key market drivers, restraints, challenges, and opportunities.

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