Online Education Market in India 2021

Abstracts

In the wake of the pandemic, more than 500 million students have been impacted because of intermittent closure of schools and universities. Technological innovations have disrupted traditional education system. Online learning platforms have grown rapidly across educational segments – primary, secondary, higher education, test preparation, and casual learning. The online education market is highly fragmented. There are a few niche players that operate in the various segments, and start-ups with innovative offerings are gradually gaining ground.

Market insights:

Over the last decade, technological advancements have enhanced online education. These include the application of information and communications technology (ICT) in classrooms and the use of cloud-based platforms, virtual reality (VR), and augmented reality (AR). In 2020, the online education market was valued at INR 91.41 Bn. It is expected to reach INR 325.48 Bn by 2026, expanding at a compound annual growth rate (CAGR) of ~17.19% during the 2021 – 2026 period.

Impact of COVID-19:

Physical classes were suspended for more than a year following the onslaught of COVID-19. Schools, colleges, and educational institutions adopted online classes due to the implementation of nationwide lockdown and fear of COVID-19. Universities and colleges are transitioning to a blended learning model, providing both, face-to-face and online education. Modern methods of delivering and assessing learning objectives are being incorporated into the educational system, creating the scope for significant educational research and epistemology change.

Government initiatives:

The government played a key role to ensure the successful operation of online classes . Some of the major initiatives undertaken by the government are National Digital Educational Architecture (NDEAR), PM eVIDYA Program, National Initiative for School Heads and Teachers' Holistic Advancement (NISHTHA), and 'ShaGun' Portal.

Market Influencers:

Market drivers:

Over the years, the availability of low-cost smartphones has led to an increase in the demand for internet services. This has spurred the demand for online content, including education material, in both rural and urban areas. There has been an increasing demand for industry-relevant training courses. People are considering online learning as a low cost substitute for traditional learning.

Key deterrents to the growth of the market:

Indians are familiar and comfortable with the conventional face-to-face mode of learning, which impedes the adoption of online learning. Online channels fall short when it comes to replicating certain aspects of offline channels, such as interaction with peers, group learning, feedback, and soft skill development. There is lack of formal recognition along with inadequate digital infrastructure throughout the country.

Companies covered:

NIIT Limited

Edukart Education Private Limited

Individual Learning Private Limited

Sorting Hat Technologies Private Limited

Think and Learn Private Limited

UpGrad Education Private Limited

Vedantu Innovations Private Limited

Coursera Inc.

Simplilearn Solutions Private Limited

Udemy India LLP

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