

# **Social and Emotional Learning (SEL) Market Forecasts to 2030 – Global Analysis By Component (Programs and Solutions, Assessments and Tools, Services, Content and Resources and Other Components), Delivery Mode, Mode of Implementation, Application, End User and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Social and Emotional Learning (SEL) Market is accounted for \$4.4 billion in 2024 and is expected to reach \$16.7 billion by 2030 growing at a CAGR of 24.6% during the forecast period. Social and Emotional Learning (SEL) is the process through which individuals, particularly students, develop essential skills to manage their emotions, build positive relationships, make responsible decisions, and navigate social challenges effectively. SEL fosters self-awareness, self-regulation, empathy, social awareness, and interpersonal skills, empowering individuals to succeed in both personal and academic settings. By promoting emotional intelligence, SEL contributes to improved mental health, reduces behavioral issues, and enhances overall well-being, creating a supportive environment for growth and learning.

Market Dynamics:

Driver:

Increasing awareness of SEL's importance

The increasing awareness of Social and Emotional Learning (SEL) is driving significant growth in the market. As schools, organizations, and communities recognize the

importance of emotional intelligence, mental well-being, and interpersonal skills, there is a growing demand for SEL programs and tools. This shift emphasizes the need for comprehensive strategies that promote emotional growth, resilience, and effective communication, positioning SEL as a vital component of modern education and personal development.

#### Restraint:

##### Lack of standardized curriculum and assessment

The lack of a standardized curriculum and assessment in the market can hinder its effectiveness. Without a unified framework, SEL programs vary in quality, content, and implementation, leading to inconsistent outcomes. This inconsistency makes it difficult to measure progress, assess impact, and ensure that all individuals receive the necessary skills for emotional and social development, potentially limiting SEL's long-term benefits and widespread adoption.

#### Opportunity:

##### Rising mental health concerns

Rising mental health concerns are significantly influencing the growth of the market. As anxiety, depression, and stress levels increase among students and adults, there is a heightened focus on integrating SEL programs to address these challenges. SEL helps individuals develop emotional resilience, coping skills, and healthy relationships, making it an essential tool in supporting mental health and promoting overall well-being in educational and workplace environments.

#### Threat:

##### Data privacy and security concerns

Data privacy and security concerns in the market can have significant negative effects on its growth and effectiveness. As these platforms handle sensitive student information, there is a risk of data breaches or unauthorized access, which can lead to a loss of trust among parents, schools, and students. This fear of compromised privacy may cause reluctance to adopt or fully engage with programs, ultimately limiting their potential to improve emotional well-being and social development in educational settings.

### Covid-19 Impact:

The COVID-19 pandemic significantly impacted the market by highlighting the need for emotional support in education. With remote learning and social isolation, students faced increased stress, anxiety, and mental health challenges, driving a surge in demand for SEL programs. Schools and educators sought digital solutions to address these issues, expanding the market, while also emphasizing the importance of mental well-being in the learning process.

The assessments and tools segment is expected to be the largest during the forecast period

The assessments and tools segment is expected to account for the largest market share during the projection period. These tools help educators evaluate students' emotional skills, identify areas of improvement, and track progress over time. Various digital platforms and resources, including self-report questionnaires, observational tools, and AI-driven assessments, are increasingly used to personalize SEL experiences, ensuring more effective and targeted interventions for student well-being.

The standalone programs segment is expected to have the highest CAGR during the forecast period

The standalone programs segment is expected to have the highest CAGR during the extrapolated period. These programs are often implemented outside of traditional curricula and focus on specific SEL competencies, such as empathy, emotional regulation, and conflict resolution. By offering focused, structured learning experiences, standalone SEL programs provide valuable support for students' personal development, helping them navigate social and emotional challenges effectively.

### Region with largest share:

North America region is projected to account for the largest market share during the forecast period driven by increasing awareness of the importance of mental health. Schools, districts, and educational organizations across the region are adopting SEL programs and tools to address students' social, emotional, and behavioral needs. The demand for digital SEL solutions, coupled with government initiatives and funding, has further accelerated the market's expansion in the region.

## Region with highest CAGR:

Asia Pacific is expected to register the highest growth rate over the forecast period due to the increasing recognition of the importance of emotional intelligence. Rising concerns over mental health and emotional well-being among students have led to increased adoption of SEL programs. Additionally, the rise of digital platforms and ed-tech solutions has facilitated the growth of SEL programs. Online and app-based SEL platforms are gaining traction, allowing educators to integrate these programs into virtual classrooms.

## Key players in the market

Some of the key players in Social and Emotional Learning (SEL) market include Second Step, PATHS Program, RULER , Responsive Classroom, MindUp , The Social-Emotional Learning Alliance for Japan (SELAJ), Calm, Headspace, Playworks, Committee for Children, ThinkEd Corporation, The Social Express Inc., EVERFI, Inc., Emotional ABCs, The Institute for Social and Emotional Learning (iSEL) and Panorama Education.

## Key Developments:

In August 2023, EVERFI from Blackbaud collaborated with Truth Initiative to launch an updated prescription drug safety curriculum for middle and high school students amid the growing youth overdose crisis.

In June 2023, Panorama Education acquired Mesa Cloud, complementing its platform with graduation support technology and enhancing Panorama's suite of offerings to improve learning and well-being.

## Components Covered:

Programs and Solutions

Assessments and Tools

Services

Content and Resources

## Other Components

### Delivery Modes Covered:

In-Person

Online/Virtual

Blended Learning

### Mode of Implementations Covered:

Curricular Integration

Standalone Programs

Embedded

### Applications Covered:

K-12 Education

Higher Education

Corporate and Workplace

Parenting and Family-Based

Community Programs

Other Applications

### End Users Covered:

Schools and Educational Institutions

Corporate Entities

Government and NGOs

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market

estimations

- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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