

South Africa E-Learning Market Outlook to 2023

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New Delhi , The report titled “South Africa E-Learning Market Outlook to 2023 - By Content (Open Courseware, Customized Multimedia, Simulation Content and Online Test), By Technology (Learning Management System, Smart Classes, Smart Authoring Tools) By  Sector (Corporate, Higher Education, K-12 and Vocational training) and By End Users (Corporate Enterprise, Home Users, Non-profit Organizations and Government)” provides a comprehensive analysis on the E-Learning market of South Africa. The report covers various aspects including introduction on South Africa E-Learning market, pricing analysis, Market Overview and Genesis, Heat map, trends and developments, issues and challenges, SWOT analysis, competitive landscape and government regulations. The report concludes with future market projection and analyst recommendations highlighting the major opportunities and cautions. Market Overview South Africa E-learning market is at the nascent stage. South Africa E-Learning industry revenue has increased at a positive double digit CAGR during the period 2013-2018. The market is gradually increasing with more number of schools opting for e-learning courses and students adapting newer techniques for learning such as videos, animations and open courseware. The customers in the market are highly price sensitive as there are many players present in the market. The South Africa E-Learning market has low penetration rate due to lack of trained teachers and low internet penetration in the country. E-Learning services are used by both higher education institutions and MNCs operating in the country. The students opting for e-learning services largely use the open courseware and educational videos, whereas the MNCs majorly prefer LMS services for providing training to their employees. South Africa E-Learning Market Segmentation By Content and Technology: The e-learning market is dominated by the content segment in the year 2018. The increase in number of enrollments in High schools and growing working population has driven the demand of e-content services in South Africa. Technology services accounted the remaining revenue share in the E-Learning market. By Type of Content: Open Courseware contributed a major share in terms of generating revenues for the content services in 2018. Open Courseware are largely demanded by High schools and other home users. Customized Multimedia contributed second highest revenue share; whereas online tests accounted a mere share in the overall E-Learning market revenues in 2018. By Type of Technology: The major share in the technology market is held by learning management system (LMS) due to its increased use in corporate firms. Smart Authoring Tools have the second highest share by revenue followed by smart classes which has a minute share by revenue in 2018. By Type of Sector: The E-Learning market in South Africa in 2018 was dominated by the corporate education and Government Training Sector services which accounted for more than half of the revenue amongst all the sectors. Higher education has the second highest share. On the other hand, K-12 and vocational training sectors accounted a mere share in the South Africa E-learning market. By Type of End Users: Corporate Enterprise was the largest contributor to the E-Learning industry in 2018 followed by Home Users, Non-profit Organizations and the Government. Increasing enrollments in the higher education and growing working population has contributed to the increasing demand of E-learning services in the country. Competitive Landscape The South Africa E-Learning market is highly fragmented. The market has numerous players operating in the market. The major players in the market by content are Ceed Learning, Cyber Fox, GetSmarter, SAIDE and Via Afrika and by technology are LRMG, Net Learn, TTRO, Signify Software and Eduboard. These players compete on the basis of target audience, technological capability, distribution network, client acquisition/retention, fees and courses offered. South Africa E-Learning market Future Outlook In future, it is anticipated that South Africa E-Learning industry revenue will grow at a positive double digit CAGR of over 12% during the period 2018 - 2023. Increasing demand from corporate

clients is likely to drive future demand for LMS services in South Africa with companies adopting smarter techniques to train their employees rather than training them in a physical classroom with trainers. The growth in number of Schools, students and working population in the country will further increase the demand of E-Learning services. South Africa's High Schools are the most important pillar of its fast-growing E-Learning industry, and it has benefitted the market to grow significantly due to the rising expenditure made by the government of South Africa for the education Sector. Key Segments Covered:- By Content and Technology Services Content Open Courseware Customized Multimedia Online Tests Simulation Content Technology Learning Management System Smart Classes Smart Authoring Tools By Sector Corporate Education and Government Training Higher Education K-12 Vocational Training By End Users Corporate Enterprises Home Users Non-profit Organizations Government Key Target Audience:- Content Providers Technology Providers Hardware Providers Corporate Enterprises Higher education institutes K-12 School Chain Investors P.E. Firms Time Period Captured in the Report:- Historical Period: 2013-2018 Forecast Period: 2019-2023 Companies Covered:- LRMG Ceed Learning Edu Board The Training Room Online (TTRO) Signify Software GetSmarter The Training Room Online (TTRO) SAIDE Khulu Business Solutions SAIL ViaAfrika Key Topics Covered in the Report:- Executive Summary Research Methodology South Africa E-Learning Market Overview and genesis South Africa E-Learning Market Size by Revenue (2013-2018) South Africa E-Learning Market Segmentation (2013 and 2018) South Africa E-Learning Market Segmentation by Content and Technology Services South Africa E-Learning Market by type of Content (Open Courseware, Customized Multimedia, Online Test, Simulation Content) South Africa E-Learning by Technology (Learning Management System, Smart Classes, Smart Authoring Tools) South Africa E-Learning Market by Sector South Africa E-Learning Market by End User South Africa E-Learning Market Pricing Analysis Trends and development in South Africa E-Learning Market Issues and Challenges in South Africa E-Learning Market Government Regulations in South Africa E-Learning Market South Africa E-Learning Market Ecosystem SWOT analysis of South Africa E-Learning Market Competitive Scenario of South Africa E-Learning Market Heat map and Company Profile of Major Players in South Africa E-Learning Market Analyst Recommendations in South Africa E-learning Market

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