

A REPORT ON THE **ED-TECH INDUSTRY IN INDIA**

By Market Research & Consumer Insights Division

Social Beat





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Introduction

The traditional education system in India has governed the way students went about learning in the country for decades, however, the last few years have witnessed the onset of educational technology in the form of online learning and players like

 **BYJU'S**

 **unacademy**

 **upGrad**

 **Udemy**

dominating the e-learning space with their innovative offerings and ease of remote learning. The pandemic helped accelerate the boom of Ed-Tech in India and brought about a paradigm shift to the unconventional mode of online learning for students across categories and age groups. This trend brought about a huge influx of investments, acquisitions and the emergence of new players in the ed-tech sector leading to its meteoric growth.

Over ₹ 30,000 crores

have already been invested in this promising industry of educational technology and there is more to come. The Indian Ed-Tech sector is dominated by domestic startups with no public companies as of now. Most of them have benefitted from the pandemic and have looked into strategic expansions and some of them have also gone on a consolidation spree. A few of them have also achieved the coveted unicorn status and have been valued at over a billion dollars like BYJUs, upGrad and Unacademy. While all the three brands have taken dominance over the ed-tech sector in the country, there are a few noteworthy startups on the rise like Scaler, Teachmint, CueMath amongst others.





Owing to the exponential growth in the sector and associated changes in the industry, the Edtech sector holds several lessons and opportunities for brands. This report has been compiled to understand the ecosystem of online education from the lens of a student. The survey was conducted pan-India with a focus on the following sections of EdTech

K-12

Online Certification,

Skill development

Entrance exams.

This report will take you through the journey of a typical student before and after taking up an online course, and the various touch-points between the student and the brand. With the aid of primary and secondary research, the report concludes with key takeaways for a new as well as an established brand in the space of online education.





Introduction to

Sector-wise Classification





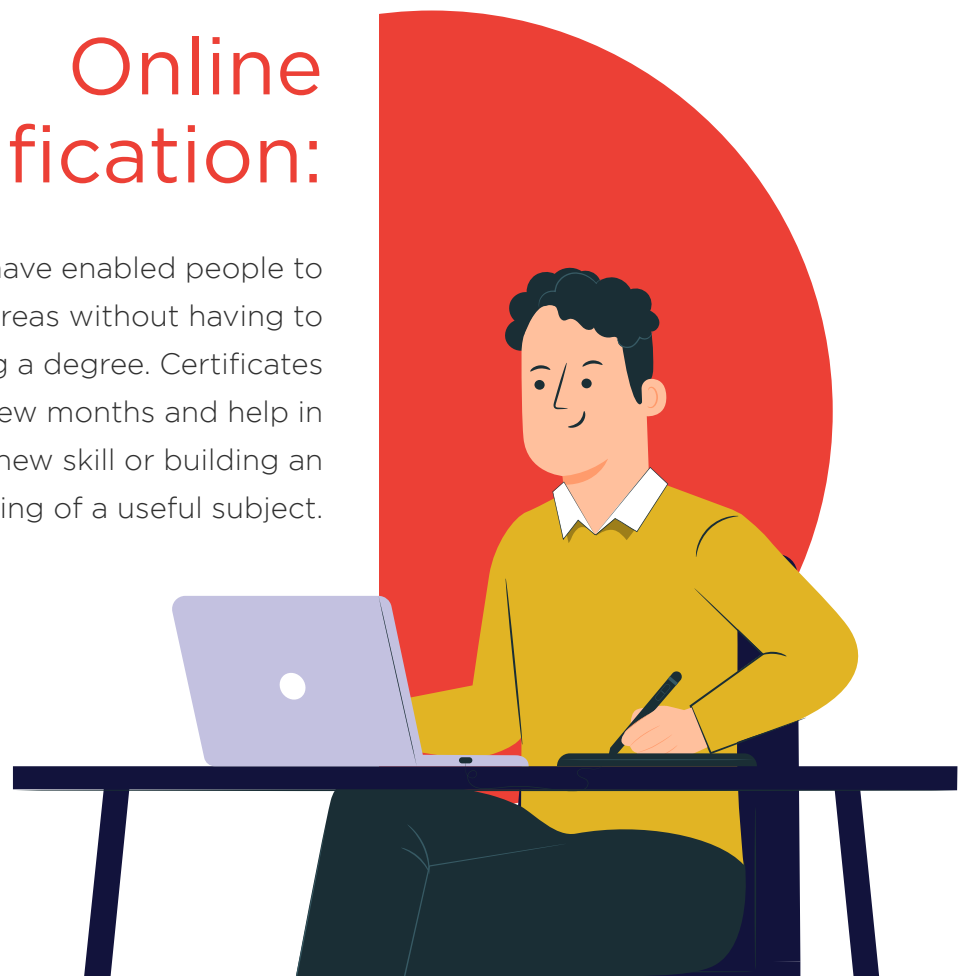
K-12 Learning:

The K-12 system is about providing basic elementary to children from Kindergarten to 12th Grade. Online courses offer study materials that supplement the school curriculum. The introduction of apps & websites has widened the scope of learning.



Online Certification:

Online certifications have enabled people to specialize in certain areas without having to spend time in getting a degree. Certificates can be obtained in a few months and help in learning a new skill or building an understanding of a useful subject.





Skill Development:

Ever since the pandemic hit, upskilling has become a trend. Everyone wants to learn something new, something different. Edtech startups have managed to enable faster upskilling as well as reskilling which has helped workers and the economy as a whole.



Entrance Exams:

Entrance exams are equivalent to qualification exams for admission to higher education in various reputed institutions of the world. The exams don't just test the student's knowledge but also their persistence, hard work, efforts and time management.

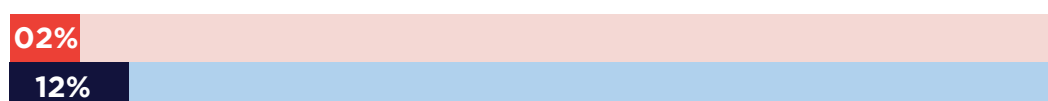
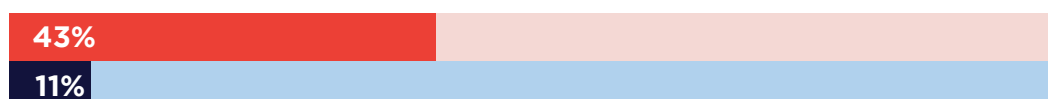
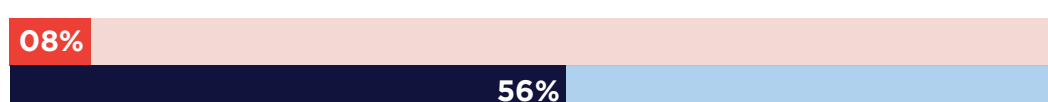
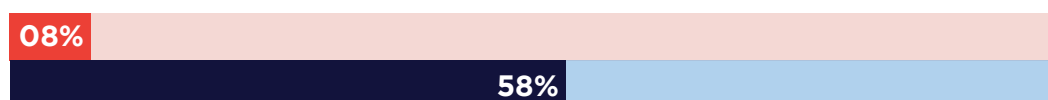
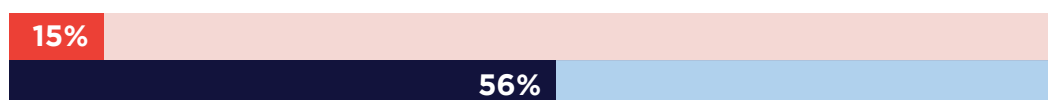




K12

■ Brand taken a course with ■ Brand heard about

- Byju, Unacademy, Vedantu, and Whitehat jr. are the most popular brands
- 62% of our respondents have had their kid take up our course with BYJU



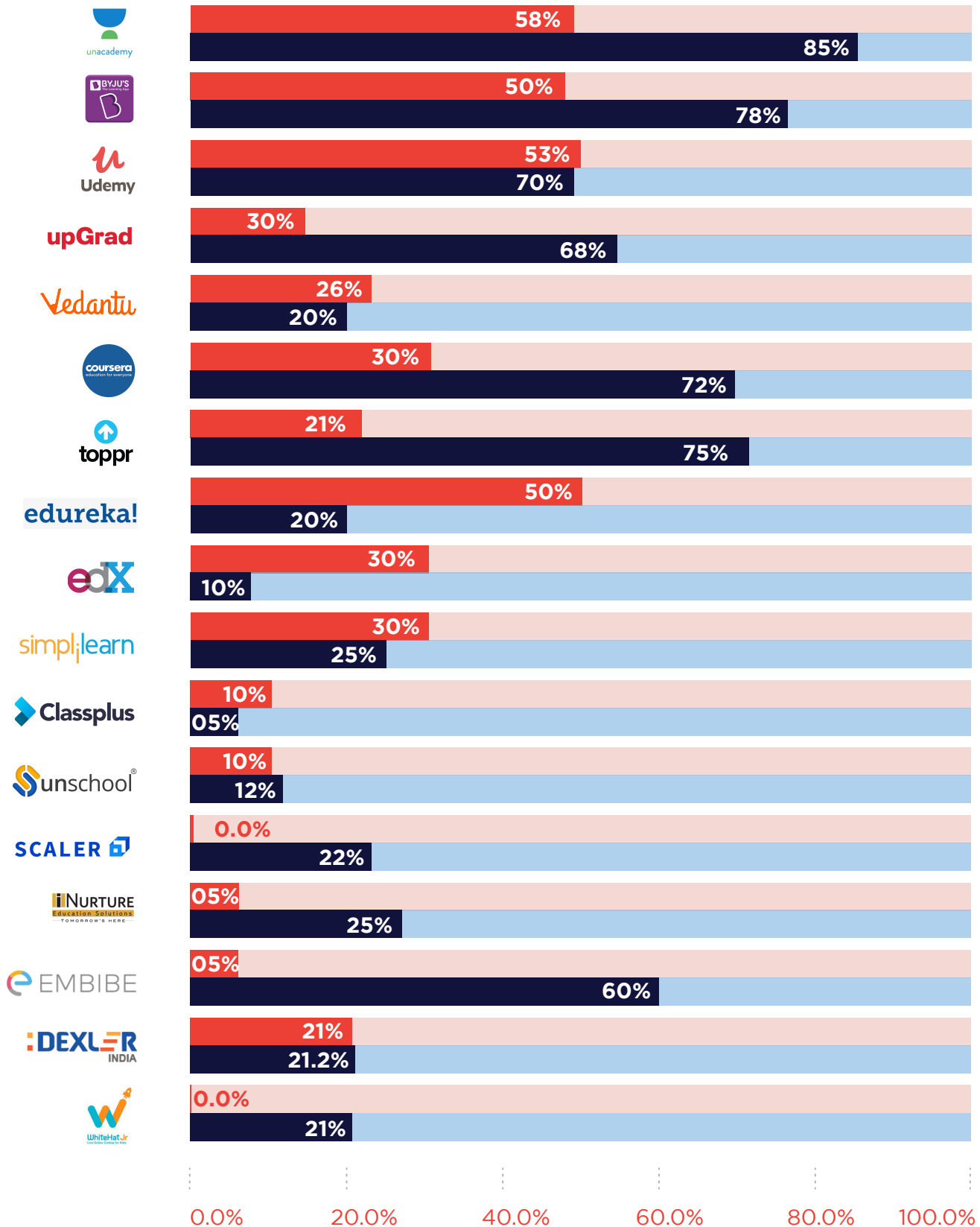
0.0% 20.0% 40.0% 60.0% 80.0% 100.0%

Skill Development, Online Certification & Entrance Exams



■ Brand taken a course with ■ Brand heard about

- Unacademy, Udemy, and Coursera have a high conversion rate.
- The most popular brands are Unacademy, Byju, Udemy, upGrad and Vedantu



Strategies adopted by top players:



Founded in 2011 by Byju Raveendran
100 mn registered students



Service offering

- Disney's Byju is an early learning app for LKG to 3rd-grade students.
- Byjus's App is for grade 4 - 12 students preparing for CBSE/ICSE/State board exams, competitive exams and coding for Kids.

Byju's marketing strategies are a wholesome mix of brand ambassadors, sponsorships, collaborations, regional campaigns and most importantly addressing and bridging the gap between millennials and GenZ. They have partnered with India's most influential personalities and communicated directly with the young generation as well as their parents. Whitehat Jr., an acquired startup by Byju's, has invested over 50% of its ad spends on TV Advertising to reach a big mass of audience and by portraying kids as creators instead of just consumers of technology. They also run massive lead generation and conversion campaigns. They run vernacular advertising campaigns to target parents and students to widen their reach.



Founded in 2015 by Gaurav Munjal, Roman Saini,
Hemesh Singh | Total No of Users: +30M (350K Paid Users)

Service offering:

- Daily online live coaching classes for 60+ exam categories,
- Recorded video lesson of over 1 mn
- 1000+ top Educator building quality content

Unacademy, acquired various e-learning companies like WifiStudy, Kreatryx, CodeChef, Prepladder and Coursavy to increase brand awareness and the credibility of their programs.





Founded by Eren Bali in 2010
30 million students, 50,000 instructors,
65 languages covering over 245 million
course enrollments over a period.



Service offering:

Skill-building courses for all age groups and instructors from various geographical regions in various languages access to a database of new courses and gets wide exposure.

Strategy:

- Initiating with giving out free content to customers to build brand awareness
- Vernacular Marketing adopted by Udemy to connect with the Indian audience
- Importance to the instructor by developing a different revenue model for them
- Selecting effective keywords and courses as the requirement of the audience
- Working on feedbacks and emphasis on ratings and reviews after every course.



Founded by Ronnie Screwvala in the year 2015
currently offering more than 7,000 hours of learning

Service offering:

- Online certifications, Higher Educations (BA, MBA),
- Skill-building courses, after course placement opportunities.
- Focussing on the 3C's - Coach, Content and Career - Link

Strategy:

- To build awareness about new offerings amongst working professionals and aspiring students, upGrad used LinkedIn for strategic outreach.
- In the period when the impact of COVID-19 was at its peak, upGrad onboarded over 100 colleges and universities onto its platform to pave the way for blended online learning as the future of education.
- upGrad's program pricing reflects its commitment towards getting students placed. 50% of the program fees are collected from the learner only if they get placed after the program's completion. This pricing strategy is the first of its kind in India.
- upGrad launches new campaign to make online degrees mainstream, TV to account for 60% of the ad spends on the campaign.





Journey of a customer

01

Discovery of a course

The process of finding out courses in the choice of field

02

Post-discovery Research

The process of collecting information about a course one is interested in

03

Measuring learning effectiveness

The process of assessing effectiveness during the course

04

Challenges during a course

The process of deciding to stay or drop out



Discovery of a course

Skill Development,
Online Certification
& Entrance Exams

K12

53%

of the respondents discover via
Digital advertisements while

50%

of the respondents discover via
Digital advertisements while

26%

discover via **Google search**

30%

discover via **Google search**

Areas of focus in Digital Advertisements

1. Brand Name

How well known is the brand?
BYJU, Unacademy, Udemy, upGrad, Vedantu
and Coursera have very well established a
brand name in the minds of customers.

2. Faculty Credentials

How does faculty rate in the following criteria?
Years of experience, the field of expertise,
testimonials and name of the organizations
associated with.

3. Testimonials

How are the stories and reviews shared
by students, parents and mentors?

4. Course Value

How has the course fared with the students
in the past? For example, what are the
placement statistics?

What **digital initiatives** have proven to be most lucrative for your brand?
What are the strategies that you do/don't recommend?

“As an infrastructure provider, we focused on talking about the problems we solve for
our users aka teachers. More specific the messaging was, the better the results were”

-Bilal Abidi, Co-founder- Wise App

Key Takeaways



The dissection of digital ads

Celebrity endorsement(especially k12)

Shah Rukh Khan, Aamir Khan, Hrithik Roshan, and Virat Kohli are a few of the popular names in the Edtech sector as endorsers. During the pandemic, the surplus funding and the need to differentiate themselves led the brands to jump into rope celebrities. This worked well for them but now there is again a need to find a new way to stand apart.

Endorse coupon codes

Coupon codes, offers and discounts are effective means to capture attention, generate interest and convert to students as the Edtech courses are considered expensive.

Endorse free trial classes

The market has become a bit cluttered hence, it is effective for brands to offer free trial classes so that it can drive students down the marketing funnel.

Faculty credentials

Highlight professional experience of faculty give an edge over others.

Emotional angle to advertisements(K12)

The angle of the relationship between parents and children and how parents want to provide the best to their children needs to be highlighted.

Endorsed one-to-one and online mentorship

K-12 as well as other sectors have seen an uptick in one-to-one sessions. There are startups like Cluey which are offering on-to-one tutoring to young students. Similarly, the existing brands are introducing new horizontals like Scaler has introduced Scaler forever as a mentorship service to tech professionals, which is being aggressively endorsed.

Variety of courses(especially for kids)

The availability of subjects and other courses as an add-on to the academic tuitions is increasingly looked at nowadays.

Tidbits

upGrad introduced a donkey as its face in campaigns who advises prospects that it is important to have outcome-oriented specialization. It brought in a new and unique angle to its campaigns when all other brands were harping on celebrity endorsements.



Best practices to improve rankings in Google search

Enhancing your google search presence,



Make sure your website has a user experience and interface tailored to the needs and expectations of the audience.



Content optimized for SEO plays a major role in helping your page rank higher on Google.



There is a strong correlation between search engine rankings and CTR. Look at increasing your click-through rate to increase the relativity of your website.



Get as many backlinks as you can.



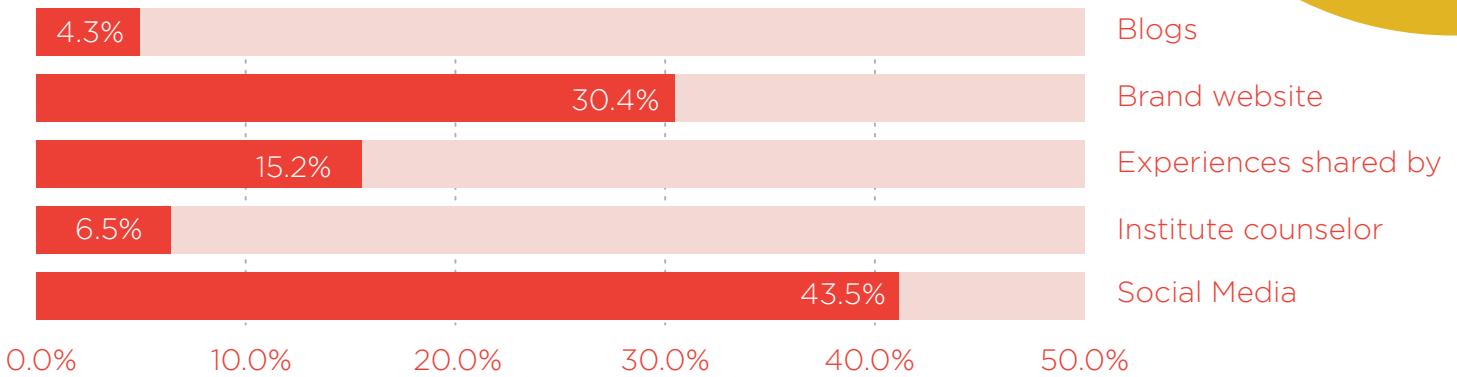
2X growth
Search interest for “online education”
in India since January 2020
-Google report



Post-discovery research



K12



44%

of the respondents head on to social media.

53%

of the respondents check out brand websites.

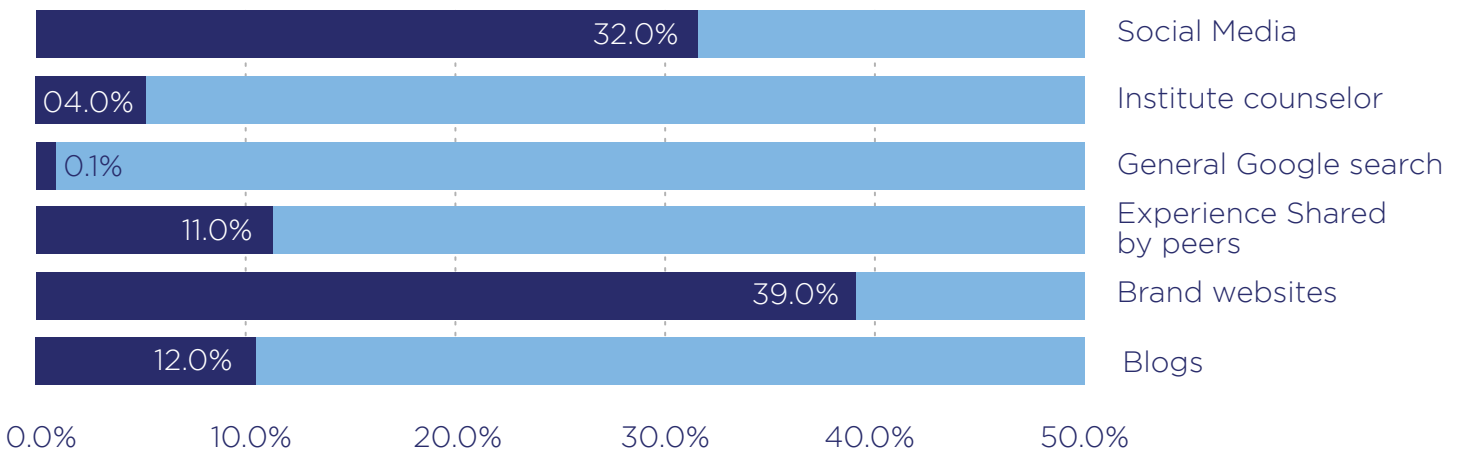
53%

of the respondents talk with peers to research more on the courses selected.

Top 3 pre-evaluation criteria before signing up for a course

Performance Assessment | **Quality Of Course Material** | **Quality Of Teaching**

Skill Development, Online Certification & Entrance Exams



39%

of the respondents head on to social media.

32%

of the respondents check out brand websites.

12%

of the respondents talk with peers to research more on the courses selected.

Top 3 pre-evaluation criteria before signing up for a course

Course structure | **Qualification of the tutor** | **Affiliated universities**

Key Takeaways



Steps that can be taken to improvise content of an Ed Tech Brand Website:

- Feature endorsements with celebrities who are 45+ and have family members who could have taken up these courses, for example, Shahrukh Khan endorses BYJU.
- Highlight key USPs via infographics, vectors and images like provision of free consultation/ trial.
- Highlight achievements via use cases, examples and statistics like student success stats, achievements, media mentions and testimonials on the website with an intention to build brand affinity.
- Have different course sections catering to specific audience buckets.

Content that can be done for the homepage:

1. Showcase your brand ambassador on your homepage to gain more awareness.
2. List down your best and most taken courses to showcase what your platform is the best for.
3. Display your success rates to gain trust.
4. Offer a free trial/demo session to push your audience to take up different courses.
5. Homepages with LeadGen forms can help you communicate directly with your audience and also play a major role in your digital marketing advertisements on Facebook, Instagram, Google and other platforms.

Content Buckets on Social Media advisable for brands:

1. Influencer Marketing has been a recent trend in the Education industry as it directly caters to their Target Audience and keeps them engaged. Vedantu has collaborated with various influencers like Prajakta Kohli, Akash Gupta, etc to meet their TG.
2. Student Success stories as well as brand success statistics are another way to show your TG that your brand is the best. Growth statistics of students, as well as brand, is an important factor considered by the TG before enrolling in a course.
3. Engaging content like quizzes, riddles and tips keep the education space interesting and your audience engaged.



Measuring learning effectiveness

Skill Development, Online Certification & Entrance Exams

K12

Top 3 criteria for measuring learning effectiveness while taking a course.

64 % of the respondents voted for quality of course materials & teaching quality.

56 % of the respondents voted for the structure of the course.

52 % of the respondents voted for performance in assessments.

Top 3 criteria for measuring learning effectiveness while taking a course.

78 % of the respondents voted for quality of course materials & Performance in assessments.

70 % of the respondents voted for teaching quality.



Brand Tidbits

BasicFirst Learning, a Jharkhand Innovation Lab-selected Edtech startup, today announced its exclusive partnership with Riiid Labs, a global leader in AI for education solutions to deliver AI-powered personalized test prep solutions for JEE and NEET exams. The partnership will enable BasicFirst to deploy personalized tools, applications, and content recommendations enabled with artificial intelligence (AI) that will help students identify their unique strengths and work on their weaknesses.

Most helpful service as a part of the online learning experience.

1. Live Sessions
2. One-to-one interaction with the tutor
3. Regular Assessments/Quizzes

The three above mentioned aspects help in creating an interactive classroom environment.



Measuring learning effectiveness

Skill Development, Online Certification & Entrance Exams

K12

39% of the respondents prefer hybrid model (online + offline) while.

46 % of the respondents prefer online only.

For adults, the hybrid model works because it is more effective and easy to use. While the online part helps in saving time and increases flexibility and gives a possibility of learning with a busy life, the offline part provides more interaction and a personal touch.

52% of the respondents prefer hybrid model (online + offline) while.

37 % of the respondents prefer online only.

School-going students prefer hybrid because it provides the best of two worlds. While Online classes will create a scope of self-paced learning and instill flexibility, offline classes will give a chance to interact with others and tutors and be able to give assessments properly.

Online learning also provides time and comfort to the parents of young children as it can be within the bounds of your home.

What students had to say

“Upskilling was only possible while changing career paths, now it is possible any time.” “Allows space to stay healthy and spend time with family” Love the play & pause aspect, “learn at any age, & pace” “Can learn something anytime anywhere”

Brand Tidbits

BYJU recently introduced a two-teacher model to simulate offline learning experiences. One teacher will offer conceptual clarity while the other will solve doubts making sessions engaging. This will also give a personalized experience to the students.

“With a maximum of 25 students per class, the interface provides student-to-teacher and student-to-student interaction, white-board mode, focus mode, raise-hand functionality — much like a physical classroom—and creates a unique learning atmosphere,” said Jiny Thattil, senior vice president of engineering at Byju’s





Drop out or not

Skill Development, Online Certification & Entrance Exams

K12

39% of the respondents have dropped out of a course in the past.

52% of the respondents have dropped out of a course in the past.

Challenges faced

Skill Development, Online Certification & Entrance Exams

Lack of focus

Several E-learning platforms have long lectures, lengthy texts and unending MCQ assessments that fail to interact with students.

Lesser interaction with peers

Though some platforms have excellent course material and teaching quality, they lack easy access to solving doubts which is a major drawback for online teaching platforms. Apps like Brainly and Doubtnut have specially curated solutions to tackle the same.

Technical difficulties

Low bandwidth and unavailability of internet and screens are some of the major challenges in the industry. Brands are making efforts to create an interface which do not require a lot of bandwidth.

K12

Missing classroom environment

86% of children were missing their classroom for more than one reason and they preferred their classroom environment more than the online classes.

Too much time spent on a laptop

Screen time has increased leading to strain on the eyes, mental exhaustion.



Key Takeaways

Classroom features

1. Offer Live and One-to-one interactive sessions on your platform and use this as an important USP in advertisements.
 2. Record all live sessions so students can view them even if there are connectivity issues.
 3. The system of evaluation needs to be more authentic and helpful like Game/AR-based learning and assessment. Gamification makes the learning app more interactive, helps users be more proactive and makes it more fun. Especially for kids, online learning is less engaging hence it needs to be integrated with gamification.
 4. Features like doubt clearing with an intuitive user interface and easy guidance from the tutors are what validates the learning experience.
 5. The quality of teaching can directly impact performance in assessments. Teachers/instructors need to put a significant effort into the preparation of engaging presentations and in-class activities.
- Need to use online pedagogies such as termbase learning, discussion forums and use of open education resources.
 - More effort is required when it comes to skill-based learning and it might require simulations and software to explain the concepts.
 - Designing structured evaluation and leveraging collaborative platforms such as Google Docs, Google Drive, Google Hangouts, MS Teams, SlideShare, Minecraft, Kahoot, Mural, Voice Thread, Edmodo, Skype, etc. for learners to discuss, listen to others, reflect, assess peers/colleagues and make it an immersive learning experience.
 - Make sure to have a feedback survey or a poll at the end of every Live session to constantly troubleshoot.
 - Engage students with breakout sessions for peer-to-peer interactions.

How can you see the EdTech sector changing in the next 5 years

“Greater variety of courses will be taught and learned by an even larger set of learners. As the barriers of location disappear, educational institutions will work towards becoming specialised in niche offerings while their audience will quickly turn global”

Bilal Abidi,
Co-founder- Wise App



Conclusion

There are 4000+ Edtech brands in India, and every second, there is a new idea brewing in someone's mind to take online learning to the next level. Brands in this space need to ensure that they are present and proactive at all the touchpoints of a potential student's journey. They not only need to account for proactive communication but also need to constantly innovate to bridge the gap between education and online learning.

The pandemic came as a blessing for the Ed-Tech industry paving way for thousands of brands to innovate, each trying to solve a problem, or fulfilling a gap, differentiating themselves from the herd. As per our research, it is highly evident that to break the clutter and become a brand of choice, brands require a combination of a unique product and the right communication strategy.



A student discovers a course via various means but primarily through digital advertisements or by simply typing it out on Google search. Hence, SEO and digital communication strategy play a key role in assisting brands in discovery and consideration by the target group. Once a student is aware of the course, he/she will go primarily to Social media, websites, or talk to friends/family. Hence, a healthy presence on Social media and the TG-tailored content on the website is what will aid in forming the desired identity in the minds of customers and therefore, the right word of mouth.

When a student starts taking a course, there are multiple factors on which this student would rate the learning effectiveness of the course. A few of the important ones are quality of course materials, performance in assessments, and teaching quality. A focus on introducing newer methods to enhance these experiences and deliver expected quality is what will make students stick. Additionally, finding ways to provide a classroom environment online and creating possibilities for interaction with peers and tutors could also give an edge to the brands.

When the rate at which new brands are being added to this bandwagon is so high, and when the brands that were introduced in 2020 have already been able to raise millions in funding, Edtech organizations are required to be smart, innovative and always on their toes!



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