



D³ Consultants
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Education Plus

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D³ Monthly Newsletter

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6

**charts
that explain
the Global
Education
Technology
Market**

Everything you need to
know about the Global
Education Technology
Market in 6 charts

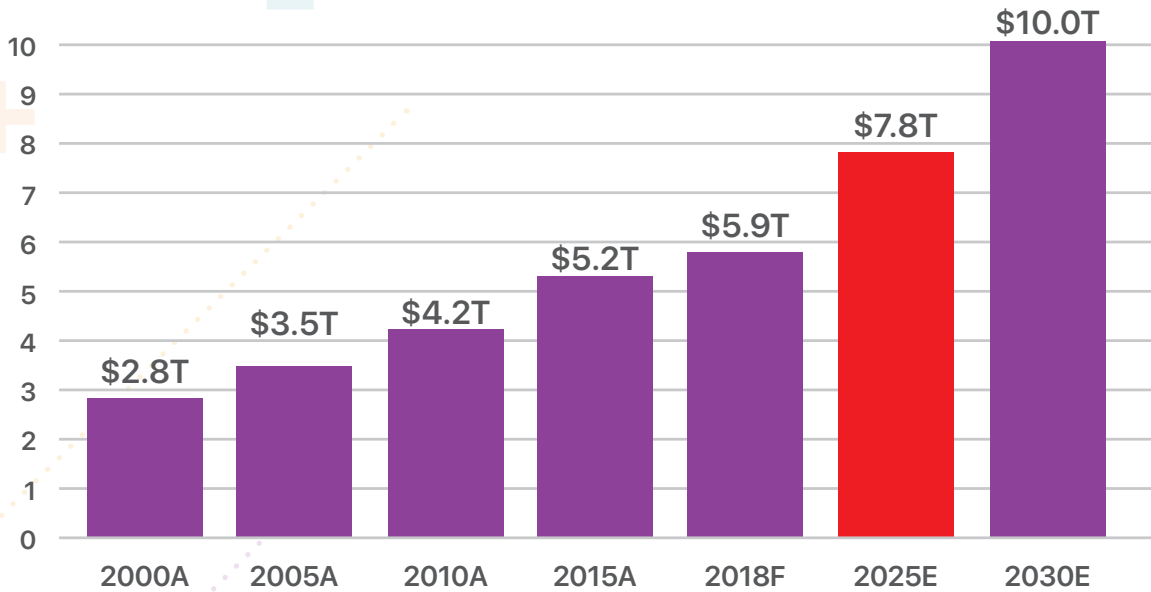


1.

Education is a \$6T industry growing to \$8T by 2025.

Global Education Market Expenditure

Total Global Education Expenditure in USD trillions



Source: HolonIQ, Smart Estimates

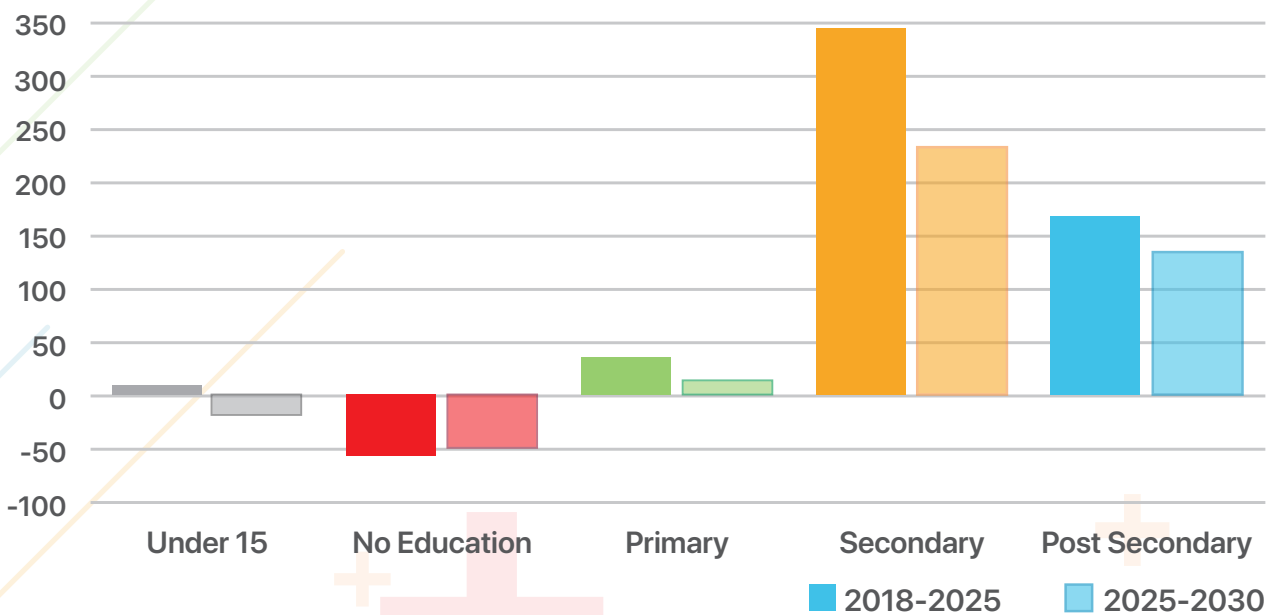
Expenditure on education and training from governments, parents, individuals and corporates continues to grow to historic levels and is expected to reach USD\$10T by 2030.

2.

Driven by 350m more secondary and 150m more post-secondary students by 2025.

Global Population Growth

Total change in global population by highest level of education attainment (millions of people)



Source: Wittgenstein Centre

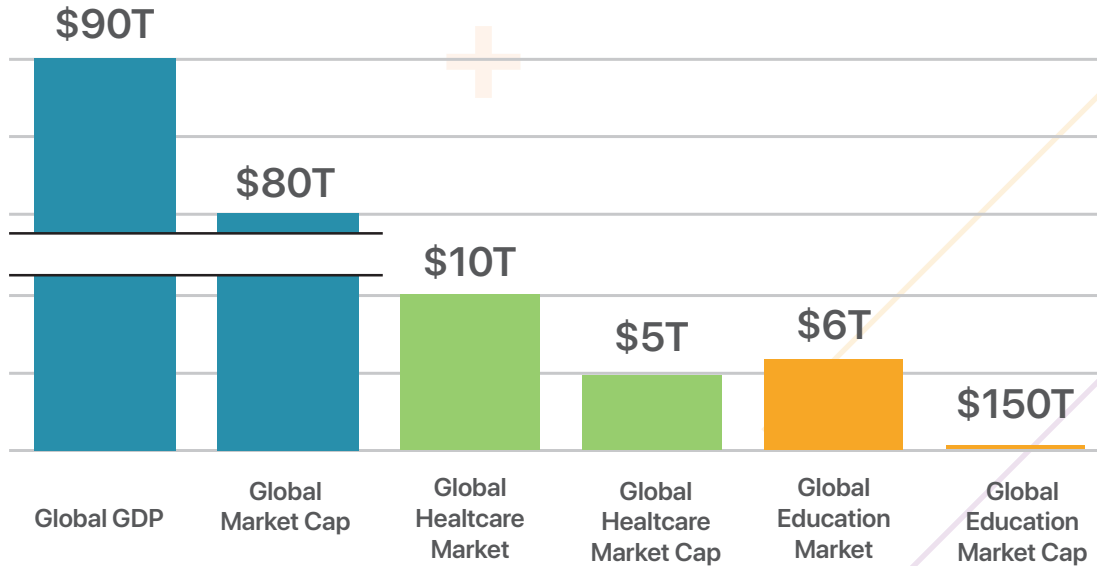
By 2025 there will be half a billion more school and university graduates in the world than today, driven primarily by population growth in developing countries. How will current models of education deliver to the scale, quality and speed required?

3.

However, education is starved of capital compared with other sectors.

Global vs Education Capital Flows

Global Markets in USD



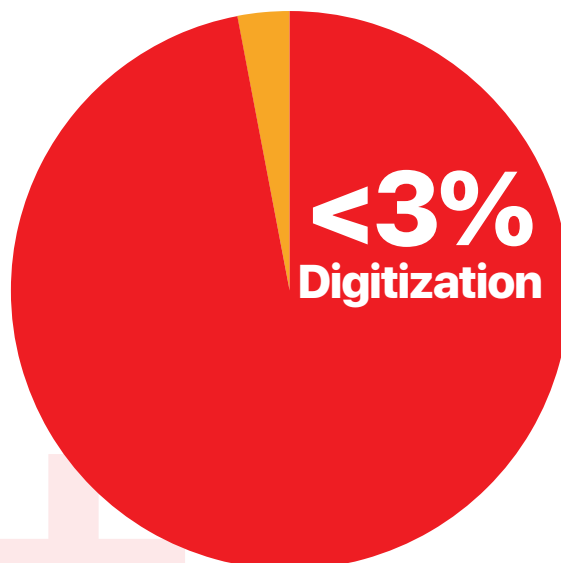
Source: HolonIQ, World Health Organization, Goldman Sachs, Standard & Poors

Innovation requires capital. Governments are struggling to fund education to previous levels and education is not drawing on enough private capital to fund the innovation that's needed. Public-Private Partnerships will be critical to supporting future growth, innovation and access to education.

4.

It is also grossly under digitized, with less than 3% of global education expenditure on technology.

Education Technology vs Total Global Education Expenditure



Source: HolonIQ

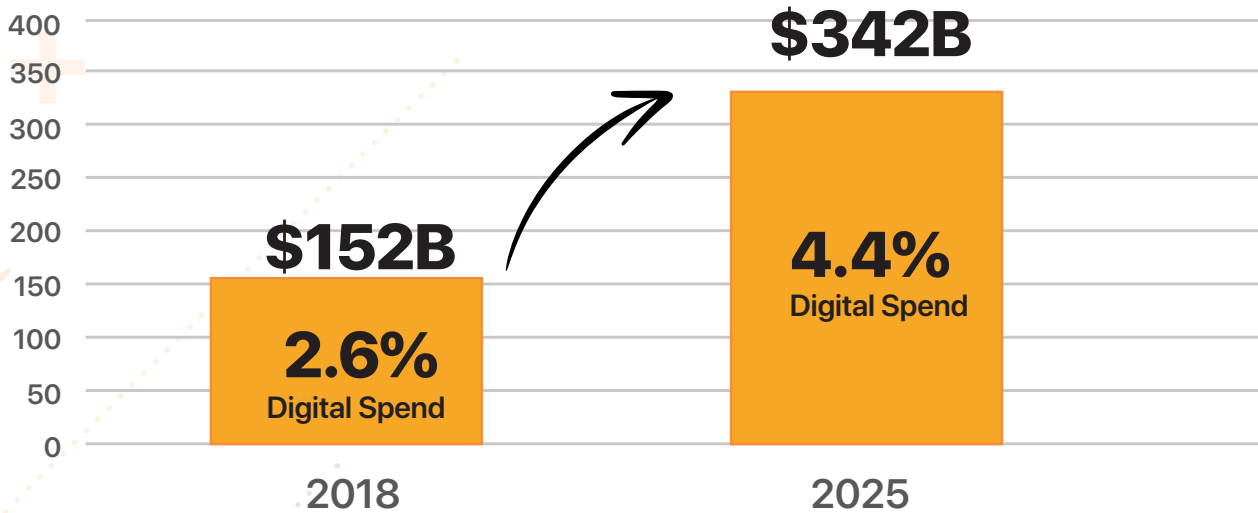
As a sector, education is a digital laggard with less than 3% of overall expenditure allocated to digital, presenting a serious challenge given the scale of what's to come.

5.

Digital spend is changing fast, though — forecast to grow to \$342b by 2025.

Global Education Technology

Growth in Global Education Technology Expenditure



Source: HolonIQ, Smart Estimates

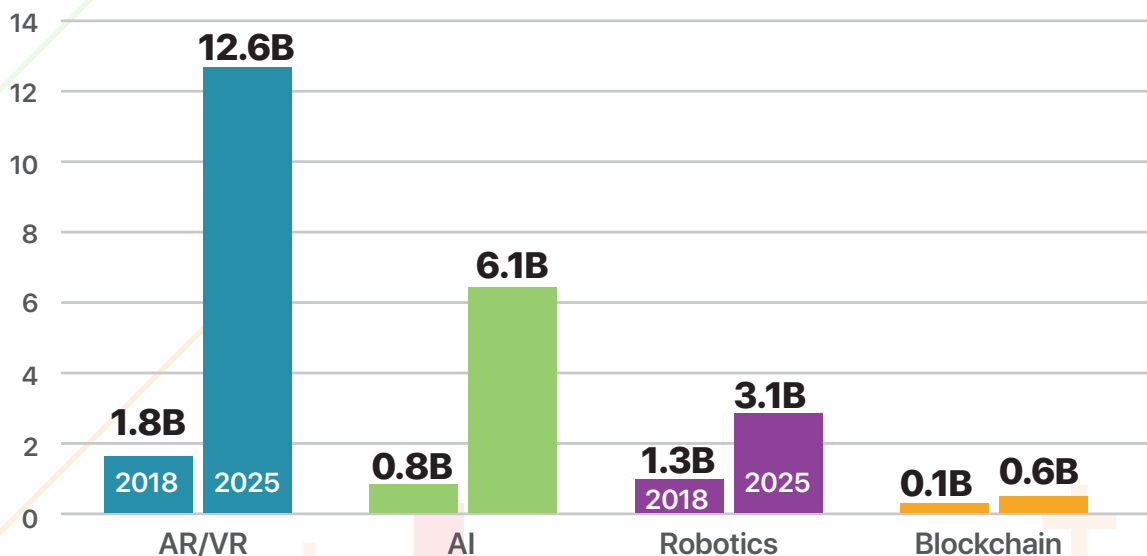
In 2018, education spent \$142b on digital. While this is forecast to grow to \$342b by 2025, it is still less than 5% of overall expenditure.

6.

Advanced technologies will embed into education delivery and learning processes.

Global Advanced Technology

Advanced Education Technology Expenditure 2018-2025, USD Billions



Source: HolonIQ, Smart Estimates

Applications of advanced technology in education and learning will begin to hit their strides by 2025 with AR/VR and Artificial Intelligence becoming increasingly integrated into core education delivery and learning processes. Most likely starting in the corporate and non-accredited sectors.