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Digitisation of Education - market review, trends and investment potential

For a Singapore-based Family Office

Business need

- A Singapore-based family office was focused on identifying transformational trends and using alternative data in conjunction with predictive analytics and AI-based tools, to predict future returns and risks.
- With impact and sustainable capital among the key focus themes, the client was looking for trends in the digitisation of education.

> To assess emerging trends in the digitisation of education and assess investment potential in the sector

The client outlined two key reasons for selecting RocSearch:

- Our ability to rapidly deploy customised strategy & investment teams with the necessary skills
- Our flexible client-centric engagement models

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Approach & Methodology

- Our strategic research team provided an overview of the industry, global expenditure statistics, key trends and drivers for the digitisation of education.

- We gathered insights on digital disruption post covid-19, covering emerging trends towards digital learning, proliferation of ed tech players, exams and evaluations, online learning solutions and public-private partnerships.

> We explored emerging trends for various micro-themes within the digitisation of education such as virtual reality (VR)/ augmented reality (AR), robotics, artificial intelligence (AI), big data and blockchain.

- For each of the micro-themes, we assessed the market size, key applications, key drivers, challenges for growth of the key market players.

- Our financial research analysts also carried out a financial benchmarking of the top listed players by market cap and top unlisted players by valuation.

Digital disruption post covid-19 (1/2)

1	Digital Learning

- A growing percentage of academic institutions are fostering a culture of digital learning where online classes have become the most viable solution to ensure an uninterrupted flow of education
- Many schools and colleges have built intranet systems and enabled a shift towards video broadcasting tools such as Zoom, Google Hangout, and WebEx to provide learning at home
- Educational institutions are using asynchronous learning programs like Discussion Board and Digital Library, with an aim to help students interact with online content in the absence of a facilitator

2	Boom of EdTech players

- Several EdTech companies like Dreambox Learning, Schoology, Sparx, BYJU's, and upGrad are aggressively seizing the opportunity and bagging new customers by offering free access to their content platforms
- Increased use of interactive apps to ensure massive engagement in live-streaming classes, providing online tutorials, and innovating around different virtual measures

3	Intelligizing exams and evaluations

- In Automated Online Proctoring solutions help teachers create online tests in a variety of formats, including skills, multiple-choice, typing, and aptitude-based
- Using audio-visual analytics and suspicious browsing activity that get recorded during the exam, these platforms avoid fraudulent activities to ensure a cheat-proof process
- The in-built facial recognition technology authenticates the candidate and provides a confidence score to indicate the right match. On the assessment front, these solutions come with an intuitive and configurable multi-section window to toggle across multiple settings to deliver simple and clear assessments
- The AI-enabled video interview capabilities further help the user screen and vet candidates based on insights

4	Online Learning Solutions

- A range of online learning solutions are being used to upskill teachers/professors and empower their roles in sustaining the education system
- Digital training sessions, workshops, and webinars are being organized to keep the faculties up to speed with emerging needs
- Teachers and school administrators are encouraged to use real-time communication tools for information sharing and enabling relationship continuity with the parents
- Counseling sessions have been prioritized to instill confidence in teachers, empower them to make a seamless transition

Sources: Forbes, Deloitte, Kellon Tech

Business outcomes

- Research-backed views and key drivers to track development in digitisation

- Findings used to create data signals to assess investment potential along with the associated risks and returns

> Our analysis enabled the client to formulate a successful investment strategy in the fast-growing global digital education arena.

About RocSearch

Founded in 1999, RocSearch has been a pioneer in empowering our clients to overcome challenges and realize their goals. Our strength is delivering research and advisory solutions through managed and dedicated teams that produce the expert intelligence our clients require to gain a true competitive advantage.

We draw on proven expertise to deliver consistent value across all types of business requirements: ranging from digitization and analysis of business, financial, or customer data to the provision of 'act-on' insights for the most challenging business problems.

Our longstanding client relationships bear testament to the enduring value we create, alongside our consistent reliability and absolute discretion. We take great pride that many of the brightest global companies rely on us to help them achieve top-line growth, operational efficiency and increased profitability.

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