10 Things You Should Know About e-Learning

1. $4.4tn
2012 global education expenditure
Supported by 1.4bn students and 62.3m educators

2. 23% CAGR
forecasted out to 2017

3. 700m
individuals
of the world’s population will lack basic literacy skills by 2015

4. $1tn loan debt

5. The cost of education has risen 84% since 2000, 37% higher than CPI, which has led to situations like the US student loan debt accumulation to over $1tn. e-Learning is a cost effective alternative.

6. 2.4bn internet users

7. 257%
US student tablet ownership grew 257% last year and in 2011 technology adapted training has penetrated over 40% of the Global 500 Fortune companies.

8. Current industry hype about new ideas and consumer learning requirements are driving the whole education eco-system

9. The US(1) to push forward with Project Tin Can which will set re-purposable learning, Massive Open Online Courses (MOOCs) and Open Education Records (OER) management

10. IBIS Capital’s hot picks for e-Learning for 2013:
- next generation content and its creation tools, adaptive learning, collaborative learning, Learning Record Stores (LRS), re-usable learning, Massive Open Online Courses (MOOCs) and Open Education Resource (OER) management

Industry Overview

Industry Structure
- Content
- Management Systems
- Distribution
- Customer

Key Affecting Factors
- Regulatory/Curriculum
- Corporate Requirements
- Consumer Requirements
- Scale
- Complexity
- Efficiency
- Online
- Free/Paid
- One-to-One/One-to-Many
- Cost
- Level of Qualification
- Flexibility

Type of Business
- Publishers
- Software Platform
- Content
- Tools
- Open Source
- Smart Technology

IBIS Capital’s 5 Disruptive Businesses

- Udacity: Free online university courses
- Arentsen Honwitz, Charles River Ventures: Social learning management systems
- Open Language: Quiz-based e-learning apps
- Apollo Group: Immersive learning

Education Giants

IBIS Capital’s hot picks for e-Learning for 2013:
- next generation content and its creation tools, adaptive learning, collaborative learning, Learning Record Stores (LRS), re-usable learning, Massive Open Online Courses (MOOCs) and Open Education Resource (OER) management

Current trends in the e-Learning industry:
- The US(to) push forward with Project Tin Can which will set re-purposable learning, Massive Open Online Courses (MOOCs) and Open Education Records (OER) management

Recent M&A Transactions

Recent Fundraisings

Global Education vs. e-Learning Expenditure Forecasts 2012-2017

Global Education vs. e-Learning M&A Activity

Global Education vs. e-Learning Fundraising Activity

Notes:
1. The Advanced Distributed Learning company is sponsored by the U.S. Secretary of Defense and is contributing significantly to Project Tin Can
2. Includes transactions above $20m since 2007 and excludes transactions with undisclosed values. Includes the McGraw-Hill / Apollo transaction, which is still pending
3. Includes fundraisings above $1m since 2007 and excludes fundraisings with undisclosed values