



Quora

# Edtech trends

Based on conversations on Quora



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# List of abbreviations

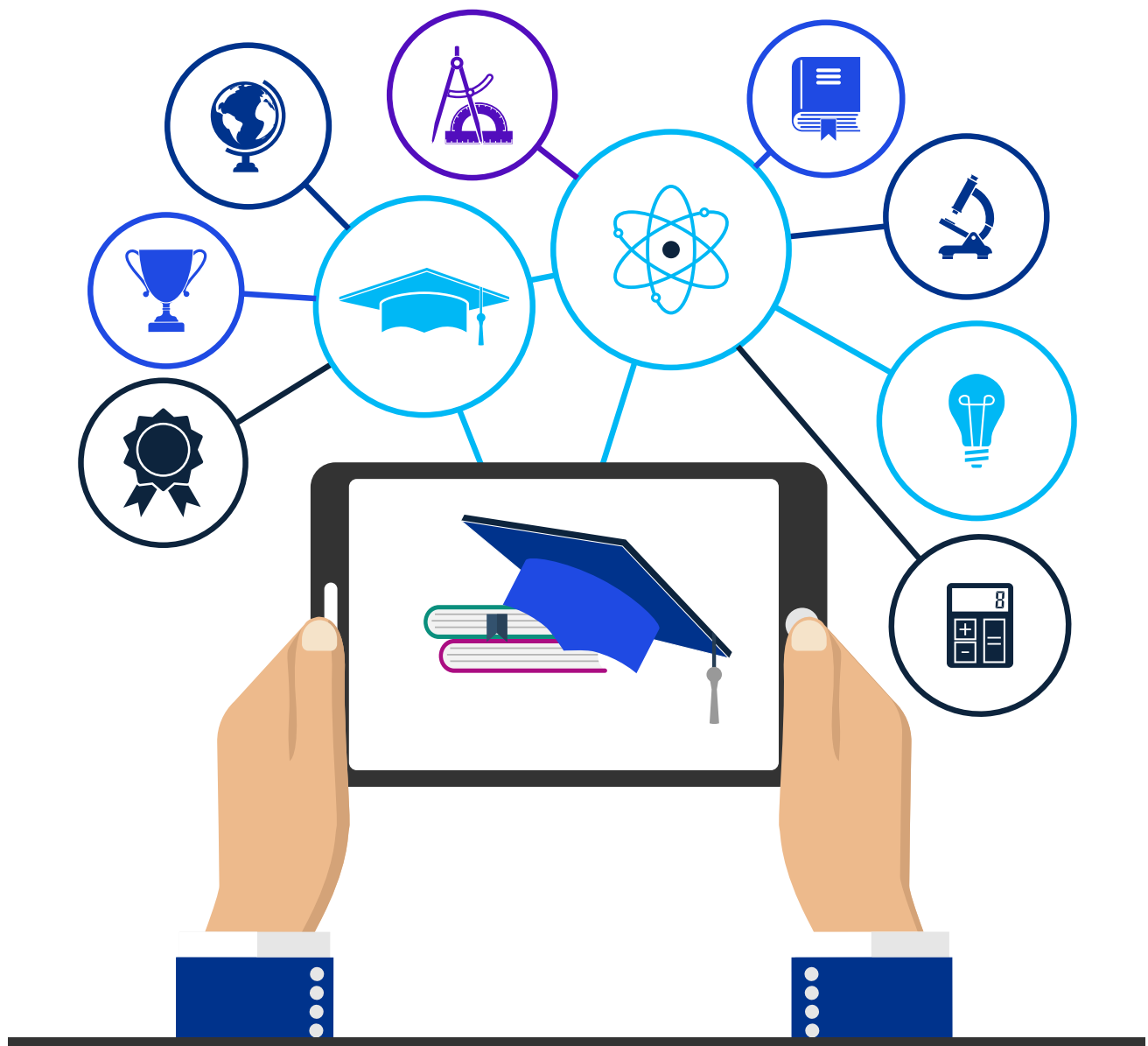
<b>CAT</b>	Common Admission Test
<b>DIKSHA</b>	Digital Infrastructure for Knowledge Sharing
<b>JEE</b>	Joint Entrance Examination
<b>NEET</b>	National Entrance cum Eligibility Test
<b>NEP</b>	National Education Policy
<b>NPTEL</b>	National Programme on Technology Enhanced Learning
<b>SWAYAM</b>	Study Webs of Active-Learning for Young Aspiring Minds



# 01 Introduction

The formal education system of India, which traditionally comprised of offline schools and colleges, has seen a significant shift towards online models across the value chain from admissions to assessments. Educational Technology or Edtech has played a vital role in the digital shift of delivery of education. The edtech industry grew phenomenally during the COVID-19 pandemic and is expected to grow even more rapidly in the coming years. The Indian edtech market was estimated to be USD 2,763 million in 2020 and is expected to rise to USD 10,269 million in 2025<sup>1</sup>. Though the online education sector in India saw immense growth during the pandemic, it is currently at a critical juncture as it needs to maintain its momentum post reopening of offline educational institutions. The growth of the

edtech industry in India is fueled by a combination of government initiatives, internet penetration, and a significant number of upcoming start-ups providing online education alternatives. The Government of India, through its National Education Policy (NEP) 2020, is taking transformative steps to digitise education and promote digital learning along with providing equitable access to education, given the digital divide in India. It has also introduced several initiatives such as National Programme on Technology Enhanced Learning (NPTEL), Digital Infrastructure for Knowledge Sharing (DIKSHA), and Study Webs of Active-Learning for Young Aspiring Minds (SWAYAM) to promote digital education in India.



1. Future of Edtech in India : Decoding the \$10 Bn Market Opportunity, Inc42, 2020

The edtech industry can be broadly classified into three categories with potential for significant online adoption, namely, K12, test prep and upskilling/reskilling.



**K12:** The K12 learning segment acts as a supplement to school curriculum for students enrolled in primary and secondary classes in school. With the widest adoption rate, this segment is estimated to surge 3.7 times between 2020 and 2025.<sup>2</sup>

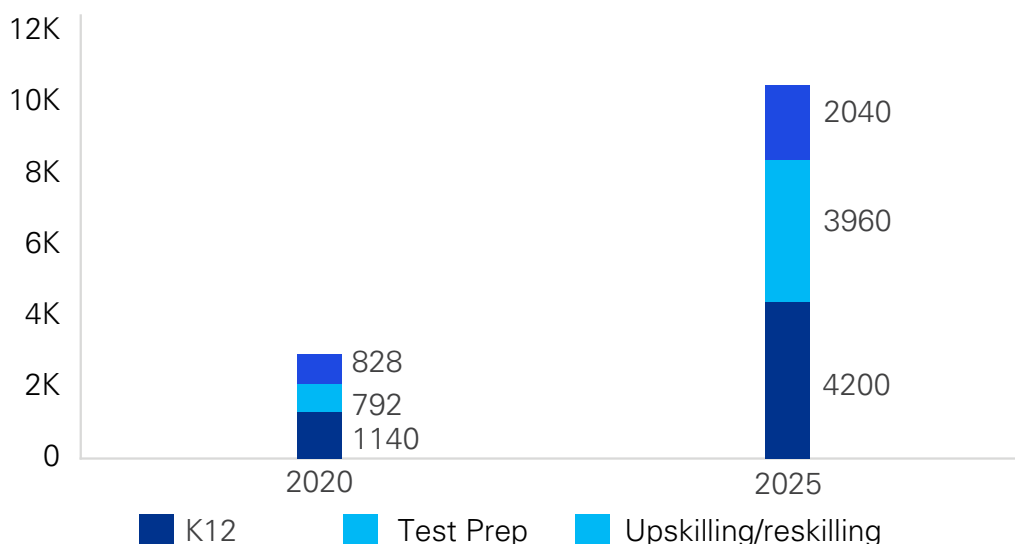


**Test preparation:** The test prep segment refers to online programmes aimed at coaching students preparing for competitive examinations. It is also expected to grow significantly due to the increase in the number of aspirants attempting competitive exams like Common Admission Test (CAT), Joint Entrance Examination (JEE), National Entrance cum Eligibility Test (NEET), etc.



**Upskilling/reskilling:** These are courses designed to assist users in skill enhancement and higher education. It is one of the most lucrative market opportunities in the edtech space due to the increase in upskilling/reskilling needs of the working population in India.

### Segment wise market size (in USD million)



Source: Future of Edtech in India: Decoding the \$10 Bn Market Opportunity, Inc42, 2020

Across all three segments, edtech players have leveraged the shift in delivery of education to the online mode and have deployed innovative strategies to acquire new users. In the K12 segment, interactive learning, computer-adaptive learning and gamification have increased learner engagement and facilitated individualised instruction to students. Use of artificial intelligence models and advanced analytics for tests have revolutionised online test prep. The pandemic has also proved that high-quality academic programmes can successfully extend beyond the traditional in-person classroom experience, which has led to higher education institutes offering more online degrees and hybrid classroom models.

This report seeks to lay out insights on consumer needs to assist edtech players to engage with

customers. Specifically, the report focuses on the increase in conversations around edtech brands and their services.

The paper lays down the following:

- How edtech related topics performed on Quora over the past two years
- Segment-wise analysis of conversation themes and brand mentions based on data from Quora
- Key takeaways for edtech players around consumer behaviour and preferences.

The data used in the report is obtained from Quora and corroborated with secondary research.

2. Future of Edtech in India : Decoding the \$10 Bn Market Opportunity, Inc42, 2020







# 02

## The digital wave in education

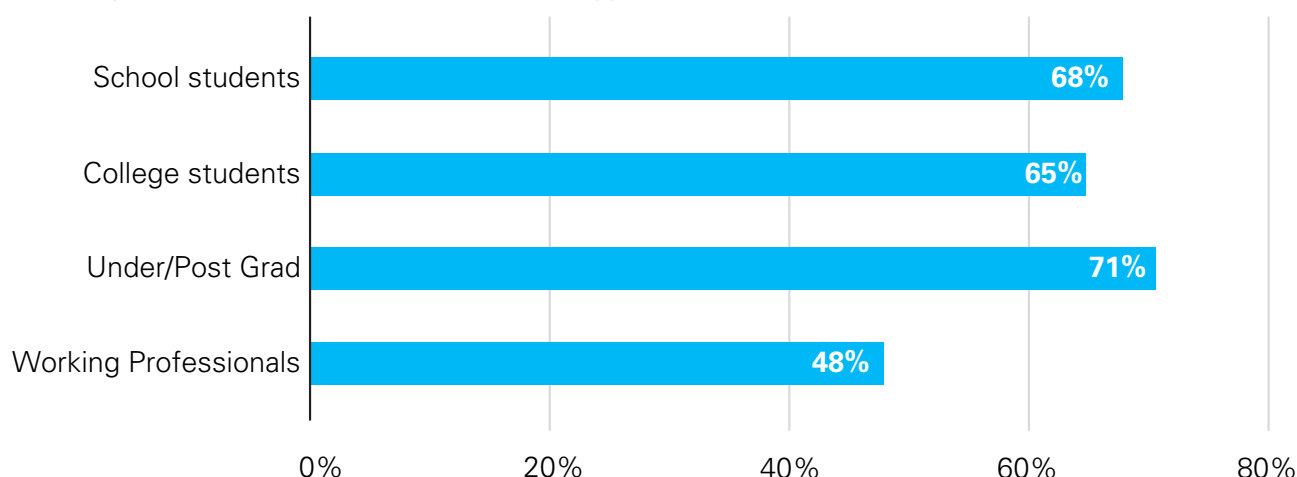
There has been a significant increase in the adoption of online learning during and post lockdown.<sup>3</sup> As per a joint report by BARC India and Nielsen, there was a 30 per cent increase in the screen time on education applications on smartphones during the first lockdown. Total learning sessions on DIKSHA have increased from USD 3,370 million in 2021 to over USD 5,080 million till October 2022.<sup>4</sup> SWAYAM has had an increase in total website visits by almost 225 per cent from 768,000 in August 2021 to 2.5 million

in August 2022. NPTEL website has observed an increase of 165 per cent from 2 million total website visits in August 2021 to 5.3 million total website visits in August 2022.<sup>5</sup>

Quora users across different levels of education show high usage of online educational apps and websites. While 57 per cent of Quora users frequent e-learning apps and websites, graduates and school students show higher acceptance for online learning.

### Majority of Quora users have adopted online learning

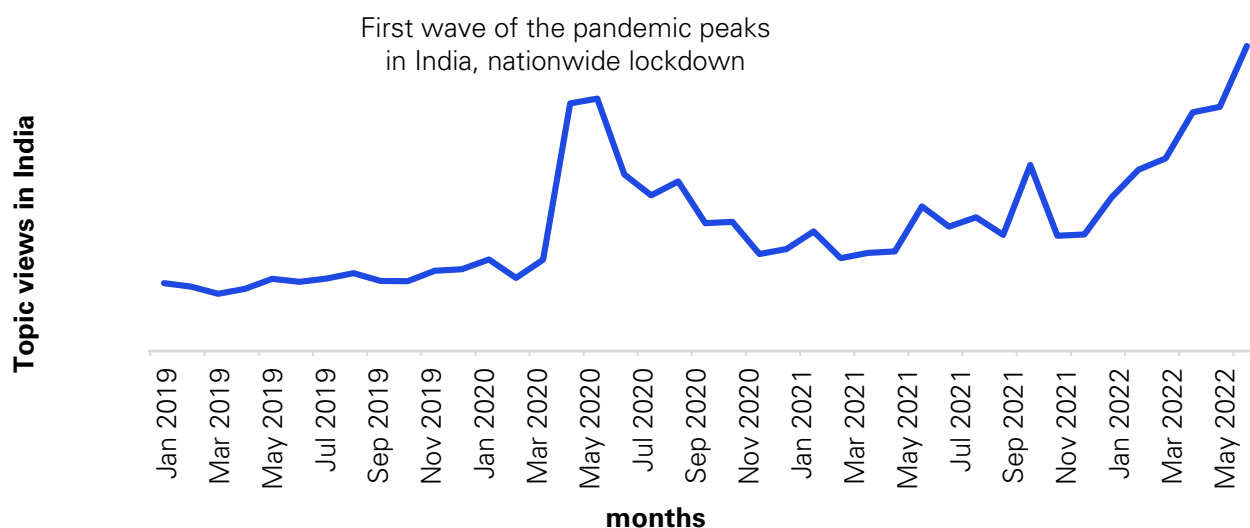
Percentage of Quora users who use educational apps and websites



Source: GWI Core July 2021 to June 2022 survey of 18000 participating Quora users in India

Analysis of internal Quora data on edtech topics from 2019–2022 shows a prominent spike in conversation views about education technology and related topics during the first wave of the COVID-19 pandemic in India. It is observed that conversations around these topics have significantly increased during the pandemic compared to the pre-pandemic period, and are on an upward trend since.

### Conversation views related to edtech on Quora



Source: Internal Quora data, January 2019 to May 2022

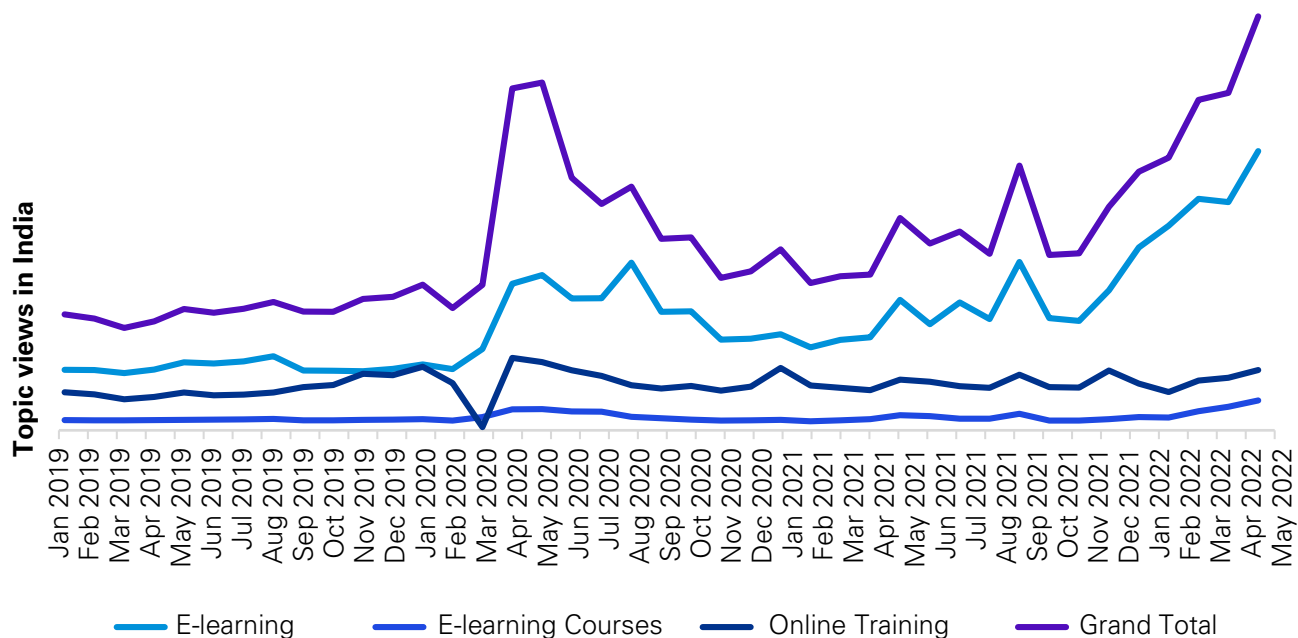
3. COVID-19 IMPACT WHAT'S HAPPENING IN THE TV & SMARTPHONE LANDSCAPE , BARC India and Nielson, March 2020

4. Data obtained from DIKSHA website, accessed 6 October 2022

5. Similarweb, KPMG in India analysis

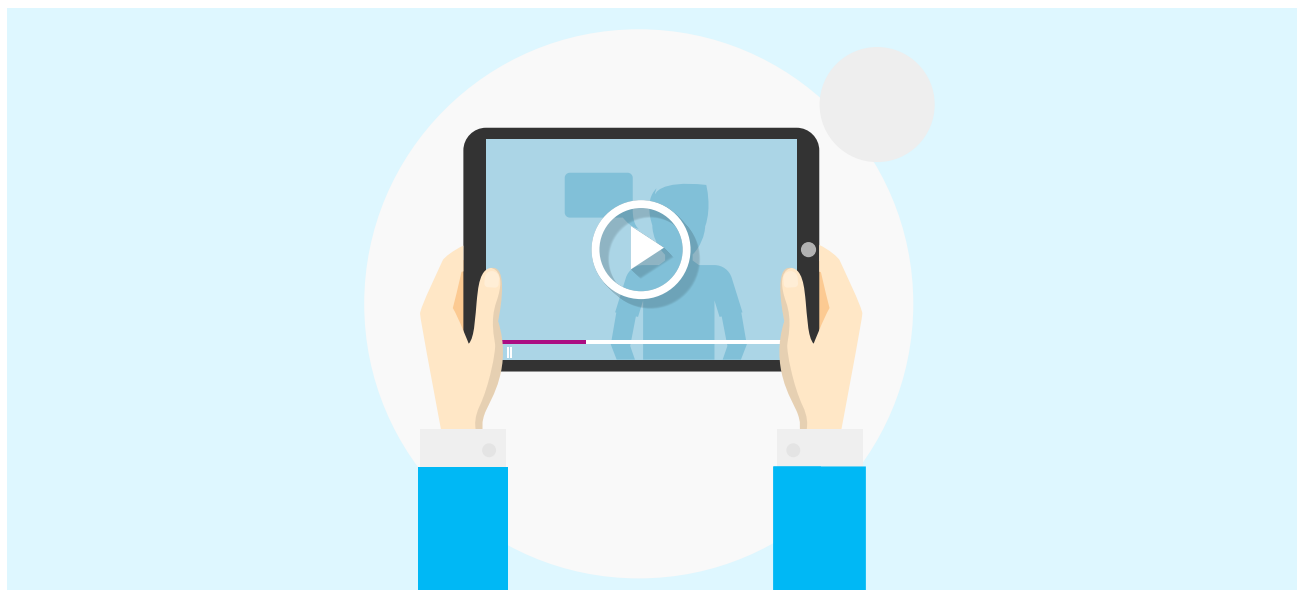
Further analysis was done to understand the topic-wise split of conversations related to edtech on Quora as indicated below:

### Top conversation themes and views on Edtech on Quora



Source: Internal Quora data, January 2019 to May 2022

e-learning contributes to an average of 58 per cent of total views for edtech related topics on Quora while online training contributes an average of 24.8 per cent of total views. View trend on e-learning related questions follows a similar trend as the total view trend while views on other topics remain almost constant.







# Segment-wise analysis: K12 and test prep

The online K12 market is expected to grow to USD 4,200 million by 2025<sup>6</sup> and will be primarily driven by the growth in user base. This can be attributed to rising internet penetration, increase in disposable incomes and the introduction of affordable products. The target users for this segment are predominantly students in K12 grades looking for supplemental education. Most players operate in an online only mode with the majority of them providing recorded content. Post the lockdown, players have started to offer more live courses. They have also started focusing on tier 2, 3 and 4 cities, and are now establishing partnerships with government schools.

The online test prep market is expected to grow to USD 3,960 million by 2025<sup>7</sup> with non-governmental exams contributing nearly 95 per cent of the revenues in 2024. Offline test prep centres are exploring offering online services as either supplementary service to mainstay target segment (grades 9 to 12) or as an offering to fringe markets (grades 6-8, tier 2 cities). Online test prep will see growth from entering into tier 2 markets and supplementing the offline market in tier 1 markets. Hybrid models combine the strengths of both the online and offline model and is likely to see growth in the future.

COVID-19 acted as a significant boost to this segment. The K12 segment saw a massive increase of 83 per cent in paid user base during the lockdown period.<sup>8</sup> Byju's added 7.5 million new users during the lockdown period.<sup>9</sup> The revenue of Vedantu increased from USD 3 million in 2020 to USD 11 million in 2021.<sup>10</sup>

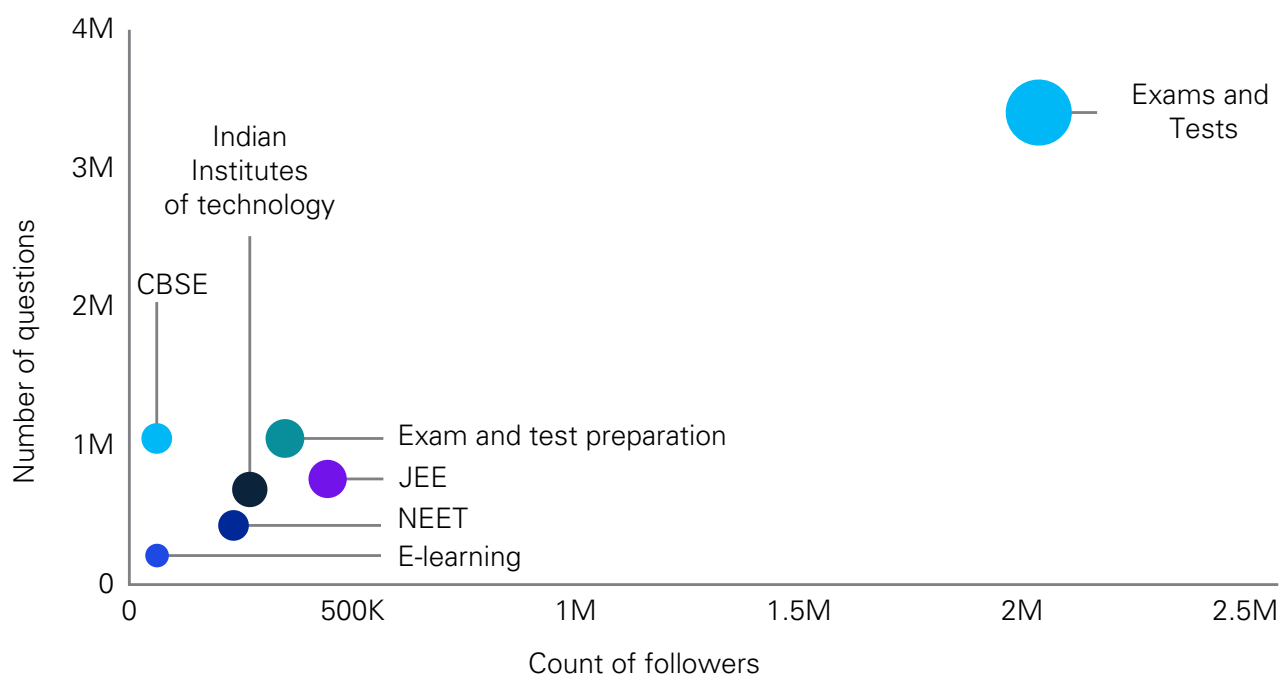
### 3.1 Conversation themes

#### Popular K12 and test prep topics on Quora

Exams and tests are popular topics in the education category on Quora with over a million users in India following discussions ranging from tips and tricks for cracking competitive exams like JEE, NEET, CAT and government exams to discussing how to inculcate discipline in study routines.

Central Board of Secondary Education (CBSE), India and e-learning are the two topics with large volume of conversations in the K12 category. Students seeking career advice at major turning points in their academic life engage in conversations about board exams, e-learning apps and platforms and choosing the right majors for their dream career.

#### K12 and test prep topic engagement on Quora



Source: All-time internal Quora data

6. Future of Edtech in India : Decoding the \$10 Bn Market Opportunity, Inc42, 2020

7. Future of Edtech in India : Decoding the \$10 Bn Market Opportunity, Inc42, 2020

8. Reimagining Edtech- The COVID Effect, NASSCOM, October 2020

9. Reimagining Edtech- The COVID Effect, NASSCOM, October 2020

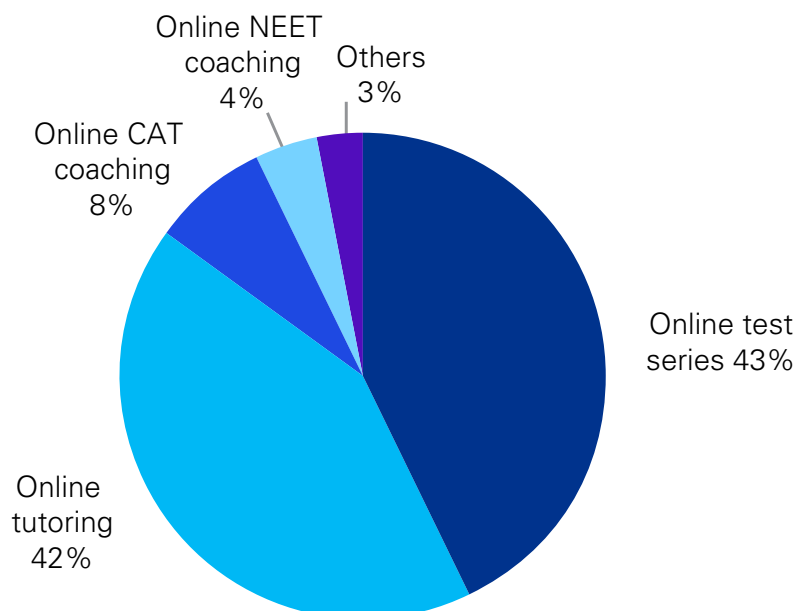
10. Data obtained from VCCEdge, Accessed 13th October 2022



## Popular K12 and test prep questions on Quora

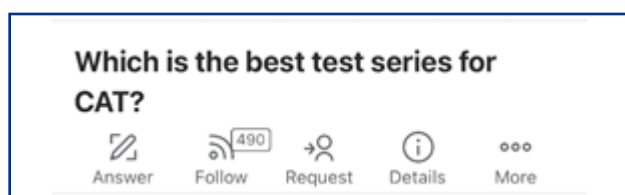
An analysis of K12 and test prep top questions on Quora by number of ad impressions show the following themes.

### Question themes in K12 and test prep



Source: Internal Quora data, January 2021 to September 2022

**Online test prep:** The online test prep market is huge, with over 1.9 lakh students appearing for CAT<sup>11</sup>, 18 lakh students appearing for NEET<sup>12</sup> and almost 9 lakh students attempting JEE<sup>13</sup> every year. Online test prep is the most popular conversation theme for this segment on Quora with almost 7.34 lakh cumulative ad impressions on top questions in the segment. Conversations regarding online test series revolve around asking for feedback for different test series, assistance in choosing the right test series, etc. Some of the top questions on Quora by number of ad impressions are:



**57,000**

ad impressions



**41,000**

ad impressions

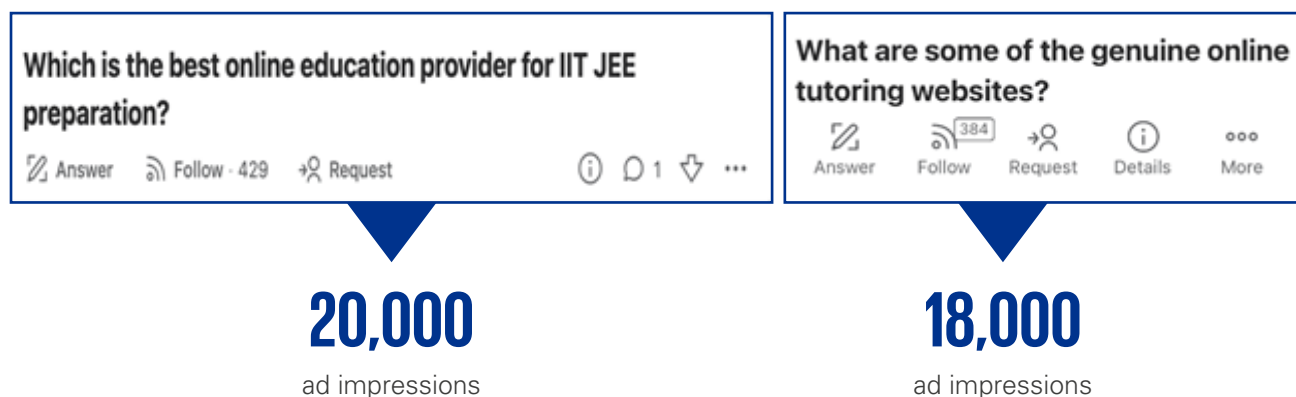
11. Media Release CAT 2021, 3 January 2022

12. NTA Declares the Result/NTA Scores/Rank of National Eligibility cum Entrance Test (UG)- 2022- Reg., National Testing Agency, September 2022

13. NTA Declares Joint Entrance Examination (Main) – 2022 Session 1 NTA Scores for Paper 1 (B.E./B.Tech.) – Reg., National Testing Agency, July 2022



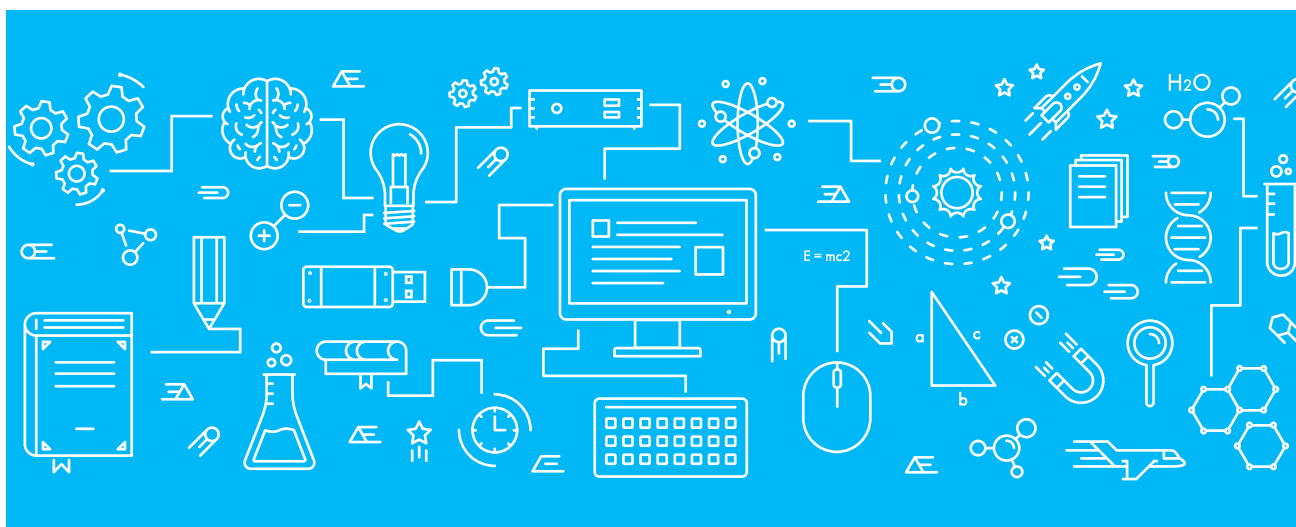
**Online tutoring:** Online tutoring is the second most popular conversation theme on Quora in this segment with cumulative ad impressions of over 7.14 lakh on the top questions. Under this category, most questions pertain to either feedback for an online tutor/tutoring platform or working as an online tutor. Some of the top questions on Quora by number of ads impressions are:



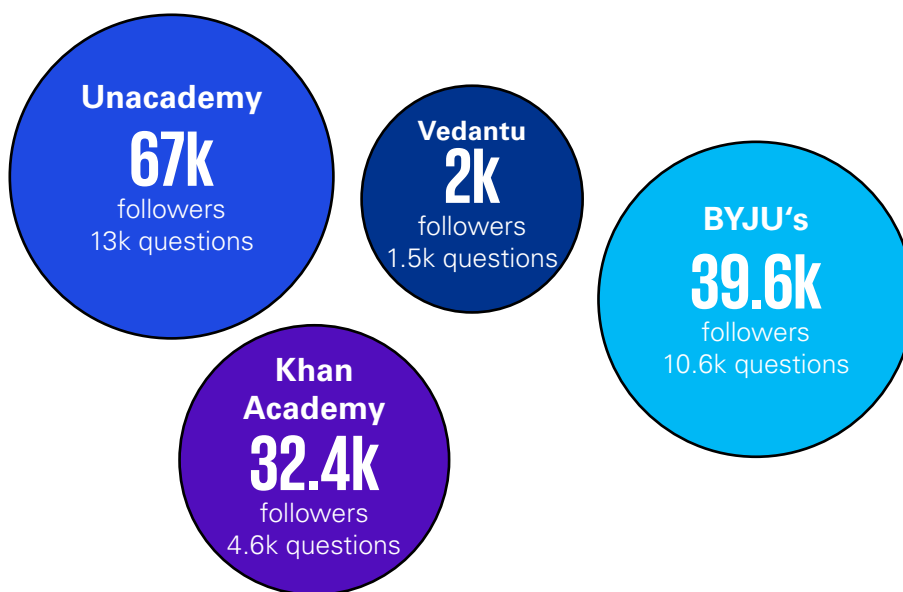
### 3.2 Brand mentions

The following are the top brands in the K12 and test prep segment with maximum website traffic during the period of July–September 2022.

Sr.no.	Brand	Website traffic (July–September 2022)
1.	BYJU's	330 million
2.	Toppr.com	250 million
3.	Vedantu	106 million
4.	Khan Academy	136 million
5.	Unacademy	55 million



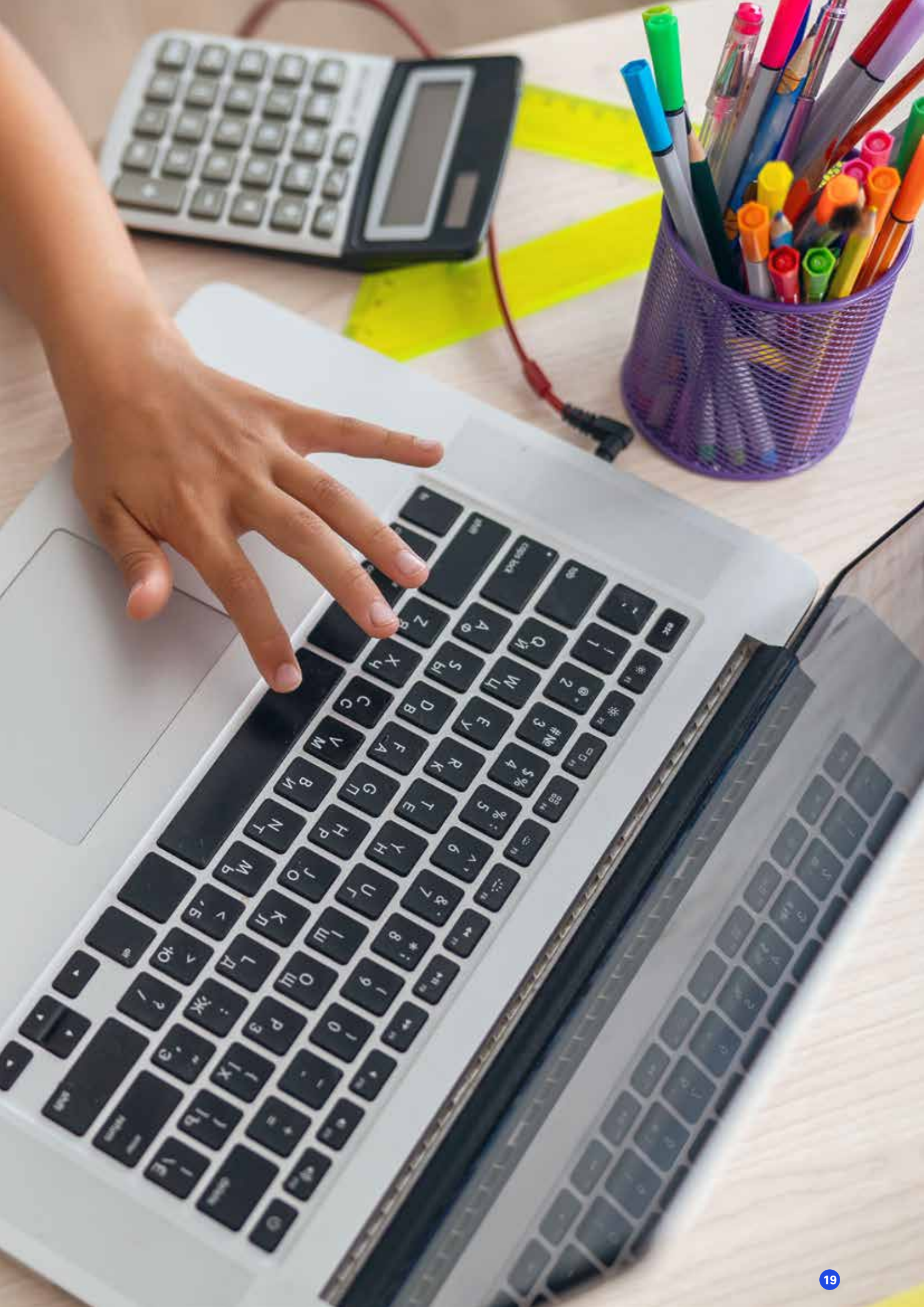
An analysis of Quora data shows maximum mentions for the following four players:



Source: All-time internal Quora data

Brand	Popular questions
BYJU's	How are BYJU'S classes coaching (tablet & regular classes) for the UPSC/IAS exam?
	How good is BYJU'S's The Learning App?
	How was your BYJU'S National Scholarship Test 2020 for IAS?
Unacademy	Who are the best Unacademy educators?
	What is Relevel? How is Relevel so successful?
	What is your review of Unacademy?
Vedantu	What is your review of Vedantu?
	Which is better for the JEE, Vedantu or Unacademy?
	What are your experiences with online tutoring on Vedantu?

Top questions for these brands are centered around reviews of their product offerings.



A close-up photograph of a person's hand holding a black tablet. The tablet screen displays three white icons on a dark background: a graduation cap, a book, and a video camera. The person's thumb is visible at the bottom left, and an orange object is partially visible at the bottom center.

**04**

# **Segment-wise analysis: Upskilling**



The online upskilling market is estimated to grow to USD 2,040 million by 2025<sup>15</sup>, with working professionals continuing to remain the largest category of end users. The domestic user base for these courses has a higher concentration in metros and tier 1 cities. Technology and finance are preferred domains for upskilling. The higher proportion of technology course offerings is due to the ever-changing landscape in technology requiring frequent upskilling in order to continue to be relevant in the industry. According to the Coursera Campus Skills Report, 2022, the top jobs by student demand are data scientist, data analyst, software engineer,

machine learning engineer, and marketing specialist.<sup>16</sup> The World Economic Forum (WEF) report on the future of jobs also mentions both data science and digital marketing as 'jobs of tomorrow'.<sup>17</sup>

The demand for online higher education has also been increasing recently. The government is promoting the same with initiatives such as digital universities announced in the Union Budget 2022–23. Many of the top ranked universities, both Indian and international, have also ventured into this space either through their own platforms or in partnership with other edtech players.

The top questions by ad impressions in the upskilling segment include:

Question	Ad impressions
<b>What is the best online course to learn AI?</b>	1,12,000
<b>Which are the best online courses for machine learning?</b>	1,57,000
<b>How can I become a data scientist?</b>	95,000
<b>What is the best paid Spoken English Online Course?</b>	94,000
<b>Is Upgrad data science course worth it?</b>	85,000

Source - Internal Quora data, January 2021 to September 2022



15. Future of Edtech in India : Decoding the \$10 Bn Market Opportunity, Inc42, 2020

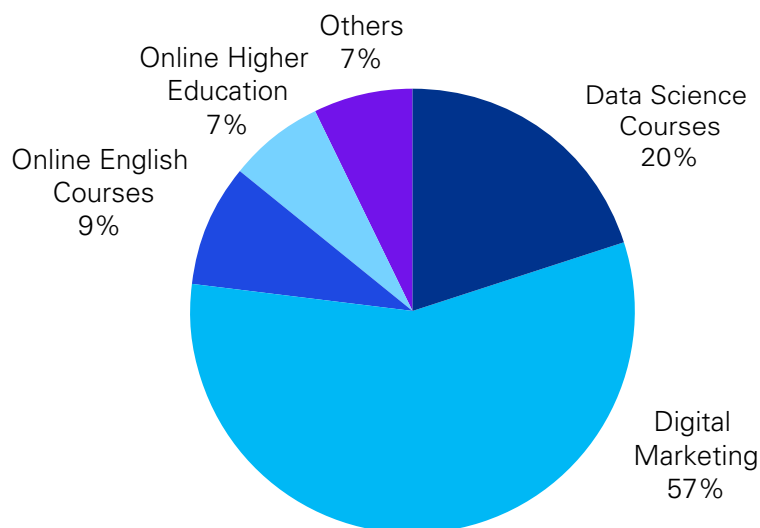
16. Campus Skills Report, Coursera, 2022

17. Future of Jobs 2020, WEF, October 2020

## 4.1 Conversation themes

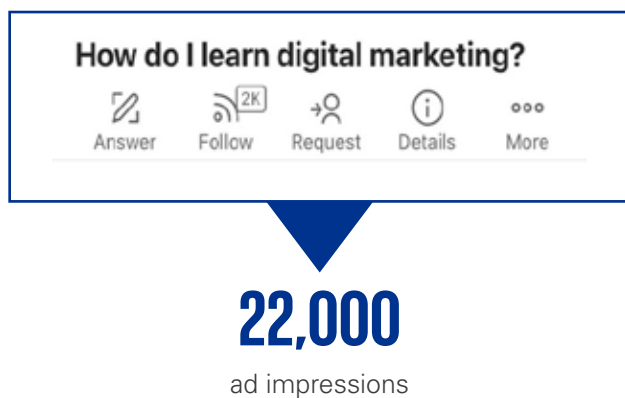
An analysis of upskilling top questions on Quora by number of ad impressions show the following themes:

### Question themes in upskilling

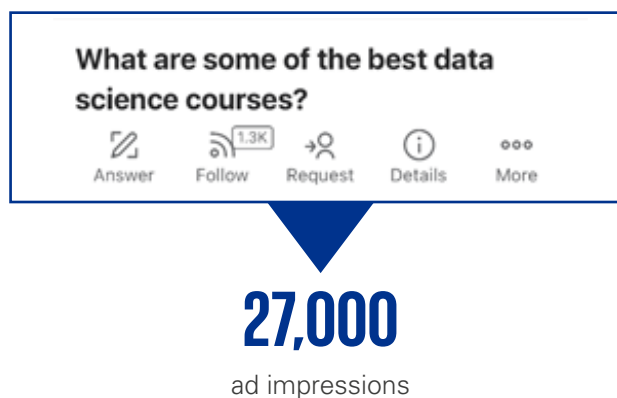


Source - Internal Quora data, January 2021 to September 2022

**Digital Marketing courses:** Digital Marketing courses is the top conversation theme on Quora for the upskilling segment with cumulative ad impressions of over 6 lakhs on the top questions. Some of the top questions on Quora by number of ads impressions are:



**Data Science courses:** The second most popular conversation theme on Quora in the upskilling segment is Data Science courses. Some of the most viewed questions on Quora for this topic are:

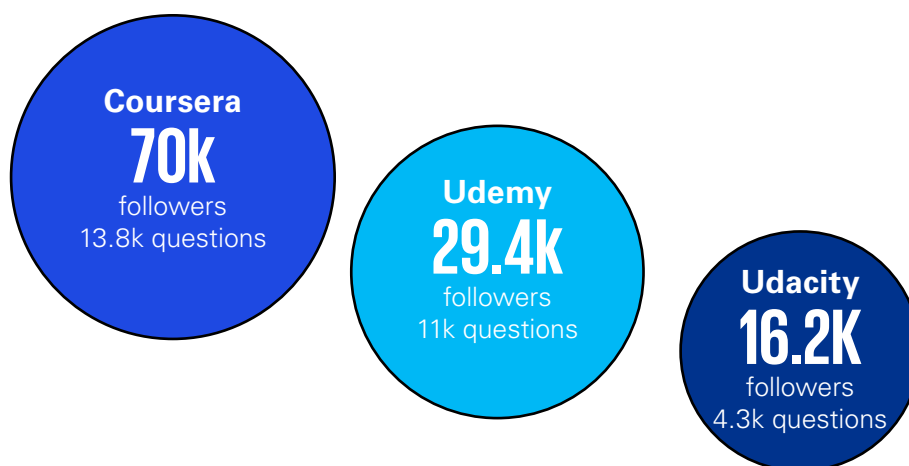


## 4.2 Brand mentions

The following are the top brands in the upskilling segment with maximum website traffic during the period of July–September 2022.

S.no.	Brand	Website traffic (July–September 2022)
1.	Udemy	326 million
2.	Coursera	175 million
3.	Simplilearn	26 million
4.	Upgrad	15 million
5.	Udacity	15 million

An analysis of Quora data shows maximum mentions for the following three players:



Source: All-time internal Quora data

The top three brands have high-volume topics on Quora where thousands of people ask questions and follow conversations about upskilling. This is in alignment with the increasing number of users opting for upskilling in the post-pandemic period. For example, the number of Coursera learners in India rose by a significant 42 per cent from 9.6 million in 2020 to 13.6 million in 2021.<sup>18</sup>

18. Coursera Impact Report 2020 and 2021, Coursera

Brand	Popular questions
<b>Coursera</b>	What is the price of Coursera subscription in India?
	What are some of the best Coursera courses? Why?
	How do I submit a peer graded assignment in Coursera?
<b>Udemy</b>	How do I get free Udemy courses?
	Are Udemy certificates worth mentioning in a resume?
	Are Udemy courses really worth the money?
<b>upGrad</b>	Is upGrad data science course worth it?
	Is an MBA from upGrad worth it?
	Is upGrad review good or bad?
<b>Scaler Academy</b>	What is your review of Scaler Academy?
	Is it worth joining Scaler Academy if you have a 15 LPA salary in a service IT firm?
	What is your review for the Scaler Academy and Tutor Academy Data Structure & Algorithms Course?
<b>Simplilearn</b>	What is your review of Simplilearn?
	How good is Simplilearn's data science course?
	Is it worth buying a course from Simplilearn? How are their placement services after the completion of the course?

Top questions for these brands revolve around themes like financial aid, career outcomes post completion of course, and reviews for specific courses.





### 4.3 Purchase intent for upskilling

According to a Global Web Index (GWI) survey of 18,000 participating Quora users in India the following characteristics of Quora users emerge:

- 69 per cent of Quora users in India use the internet for education and study-related purposes
- Quora users are 49 per cent more likely to have a university degree compared to the average internet user in India
- Quora users are 21 per cent more likely to purchase digital content like study programmes and learning materials compared to the average internet user in India

This high intent of Quora users to purchase digital study content may be because people come to the knowledge-sharing platform when they are in their consideration phase, and are likely to be researching information and reviews of the products and services they wish to buy. With 69 per cent of Quora users using the internet for education, Quora's digitally-savvy user base is leaning towards online for their studying purposes and they are more likely to purchase digital educational content compared to the average internet user.





# 05

## Conclusion

The edtech industry in India is on a growth trajectory. The online education market across all subsegments - K12, test prep and upskilling are expected to grow in the coming years. The government is also giving an impetus to digital education through various policies as well as initiatives. COVID-19 accelerated the adoption of online learning, which resulted in massive growth for edtech startups. However, it is important for these startups to sustain their growth even in the post COVID-19 period.

There has been a steady increase in conversations related to edtech and e-learning during the lockdown period. Conversations mainly centered around the following:

- Both in the upskilling as well as K12 and test prep segments, consumers found it difficult to identify relevant, good quality content due to its fragmented nature. Massive amounts of content were created by governments, edtech players, civil

society organisations as well as individual contributors during the COVID-19 period. This content is spread across multiple platforms, and is not tagged to the right taxonomies.<sup>19</sup> Hence, consumers used platforms such as Quora to discover right content based on user reviews

- In the upskilling segment, users were concerned about the course outcomes in terms of placements and career progression.
- Information related to courses in future skills such as data science dominated the conversations in the upskilling segment. This is in alignment with the previous point on career outcomes since these are the skills which are in demand in the industry.
- Edtech players need to focus on the above-mentioned consumer needs and pain points while designing products and marketing messages for their consumers.

All numbers mentioned in the report have been converted to USD million for easy understanding. Exchange rate used: 1 INR=0.012 USD



19. Digital integration: catalyzing public school transformation, KPMG, August 2022





# About KPMG in India

KPMG entities in India are professional services firm(s). These Indian member firms are affiliated with KPMG International Limited. KPMG was established in India in August 1993. Our professionals leverage the global network of firms, and are conversant with local laws, regulations, markets and competition. KPMG has offices across India in Ahmedabad, Bengaluru, Chandigarh, Chennai, Gurugram, Hyderabad, Jaipur, Kochi, Kolkata, Mumbai, Noida, Pune, Vadodara and Vijayawada.

KPMG entities in India offer services to national and international clients in India across sectors. We strive to provide rapid, performance-based, industry-focused and technology-enabled services, which reflect a shared knowledge of global and local industries and our experience of the Indian business environment.



# About Quora

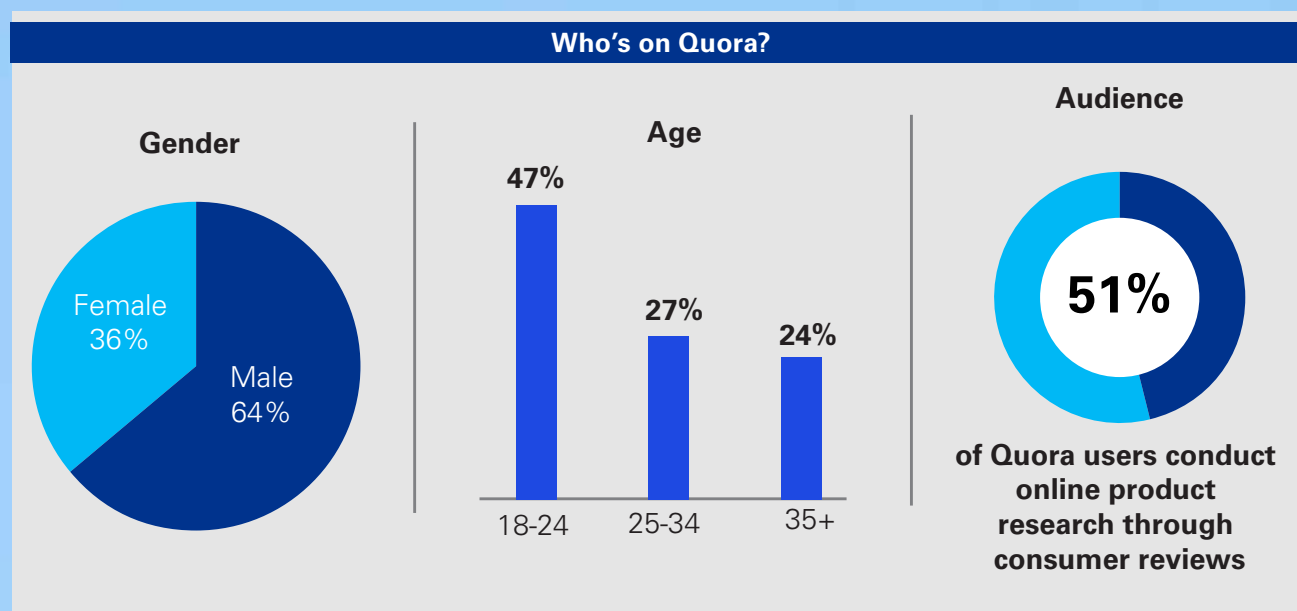
We connect the people who have knowledge to the people who need it, bring together people with different perspectives so they can understand each other better, and empower everyone to share their knowledge for the benefit of the rest of the world.

Quora for Business connects thousands of brands to over 100 million insightful Quora users in India across a wide range of topics, transforming the way brands share their industry expertise and form relationships with customers. With products such as Quora Ads and Promoted Answers, businesses can influence a high-intent audience during the consideration phase of their purchase process. Businesses come to

Quora to highlight their position as an industry thought leader, drive traffic back to their website, and build valuable relationships with customers.

## About our users

Quora users are naturally curious about the world around them, making them eager to connect with individuals with diverse perspectives and a shared zeal for knowledge. This means they are actively seeking solutions that improve their lives and the businesses they work for. Today, thousands of businesses use Quora to reach high-value customers in the consideration stage of their brand journeys.



Source - Based on Internal Quora Data, GWI Core 2021 survey of participating Quora users in India

# Acknowledgements

## KPMG in India

We acknowledge the efforts put in by the core team, right from initiation to publication of this report

## Authors

- G Manigandan
- Subadra Kalyanaraman
- Aswathy A

## Quora in India

We would also like to thank the below core team members from Quora for their inputs and suggestions

- Neha Chimbalkar
- Anuj Bhatia
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