

Higher Education Technology after COVID-19: What Now, What Next?

Thursday, November 3 at 2pm ET/1pm CT



James Wiley

Eduventures Principal Analyst

Today's Topic

WHY GETTING IT RIGHT MATTERS

- We all want to understand past trends to predict the future
- One type of prediction, called “defensive future prediction” looks to avoid surprises that could have a potentially negative impact on the person or organization making the prediction.
- Another type of prediction, called “offensive future prediction,” looks to detect future trends or events that could open the possibility for surprises and disruptive innovations.
- Getting it right, therefore, matters to avoid surprises to prevent negative impact and get ahead of surprises

Today's Topic

CHALLENGING HOW WE UNDERSTAND TRENDS

- Most analysis of trends in technology fall into one of three types:
 - Analysis of trend data (sales, implementations, etc.)
 - Analysis by experts (Delphi Method)
 - Analysis of investment activity
- But does this go far enough

Edtech Market

Market insights on Edtech covering sales outlook, demand forecast & up-to-date key trends.
Edtech Market by Component, End User & Region - Forecast 2021 - 2031

[Report Preview](#) [View ToC](#) [Request Methodology](#)

Edtech Market Outlook (2021-2031)

[446 pages Report] The global **edtech market** size was estimated to be worth **US\$ 74.2 Bn** in 2021 and is forecast to grow at a prolific CAGR of **14.5%** during the forecast period between 2021 and 2031, totaling over **US\$ 268.4 Bn** by the end of 2031. Growth in the market is driven by rising adoption of **education technologies** across various end use verticals such as **manufacturers, book**

Market Outlook:

Data Points:

- Edtech Market Value
- Edtech Market Prob
- Edtech Market Fore
- Top 5 Vendor Mar

2022 EDUCAUSE Horizon Report® Teaching and Learning Edition

[crunchbase news](#) [UNICORN BOARD](#) [EMERGING UNICORN BOARD](#) [FUNDING REPORTS](#)

BUSINESS • COMMUNICATIONS TECH • EDUCATION TECH • IPO • M&A • PUBLIC MARKETS • SPAC • STARTUPS • VENTURE

Edtech Startups Flocked To The Public Markets During The Pandemic. Here's What That Could Mean For 2022

Methodology

TODAY'S ANALYSIS

- Concentrate on technology for teaching and learning within public, four-year institutions
- Leverage the following data inputs:
 - 2022 Higher Education Technology Landscape Definitions
 - LISTedTech Implementation Data
 - Crunchbase Investment and Funding Data
 - Historical Implementation Data
 - Functional Analysis of Product Segments

2022 HIGHER EDUCATION TECHNOLOGY LANDSCAPE

A CATEGORIZATION OF TECHNOLOGY PROVIDERS

encoura Eduventures Research



Updated May 2022

Questions, additions, or feedback? Please let us know prior posted in the landscape? Contact us at info@encoura.com

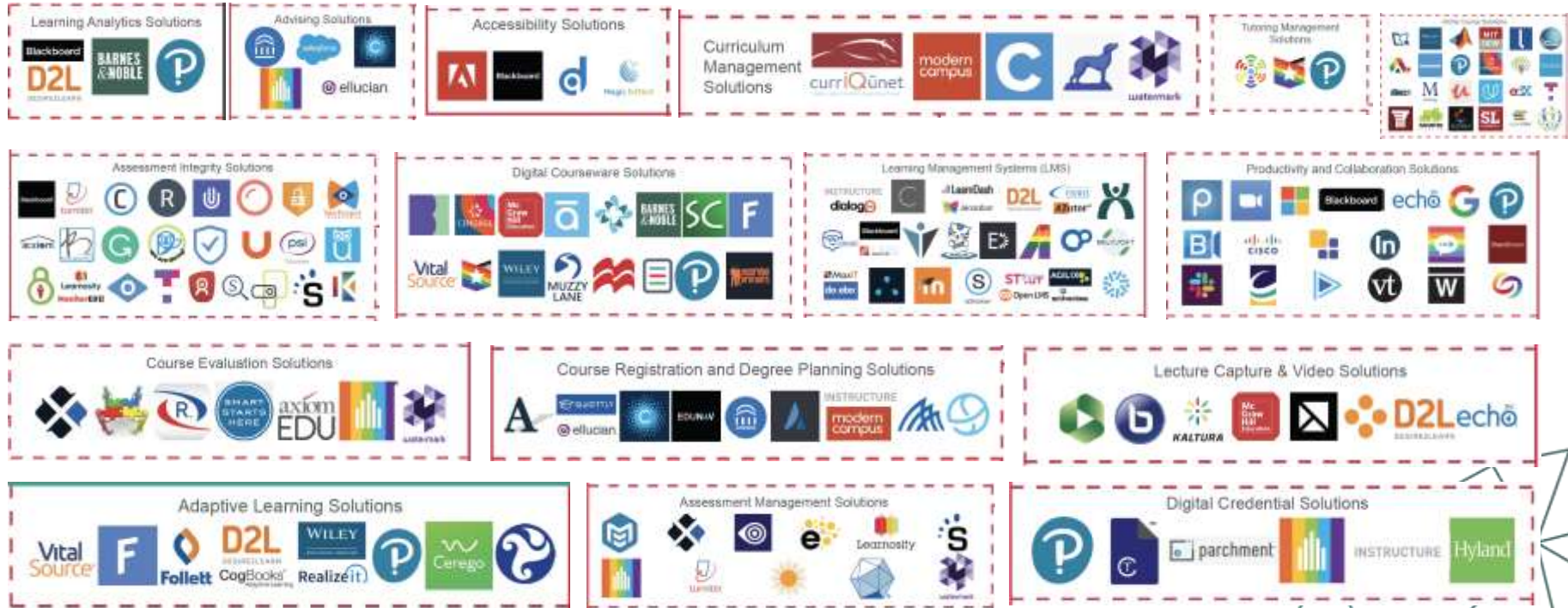
encoura.org

What can we see in
implementation trends?



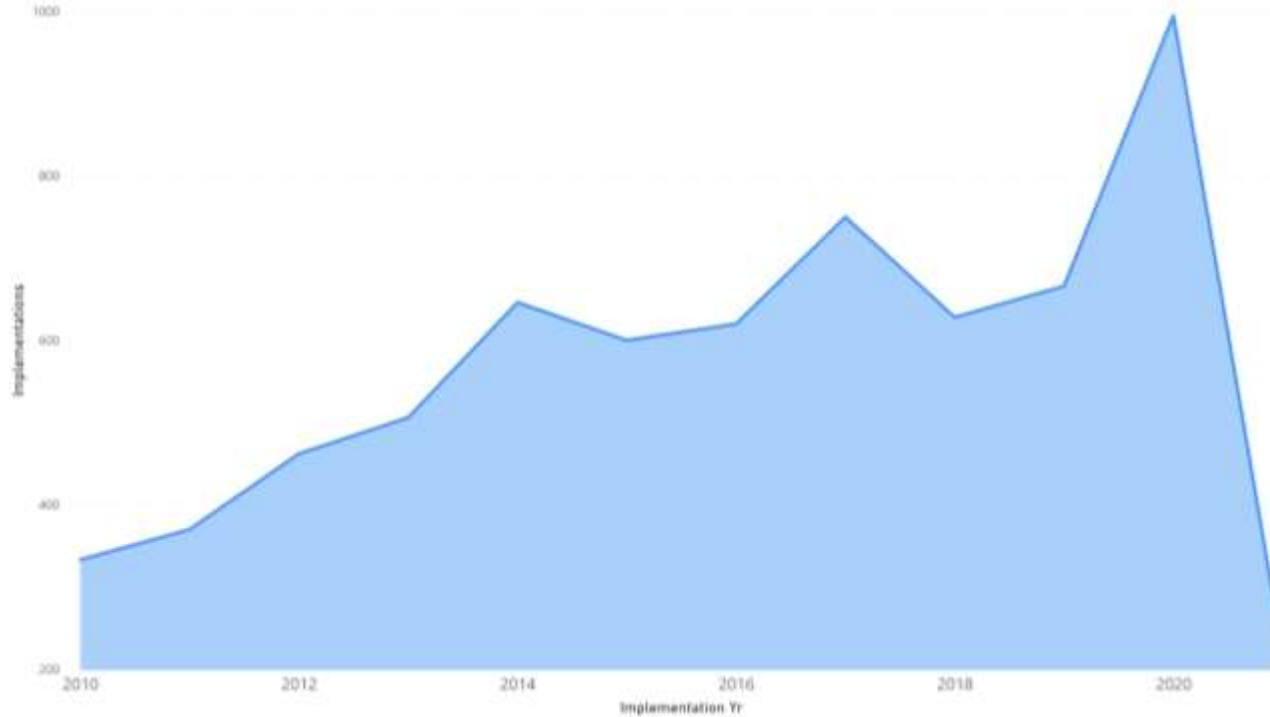
Implementation Trend Analysis

INCLUDED SEGMENTS



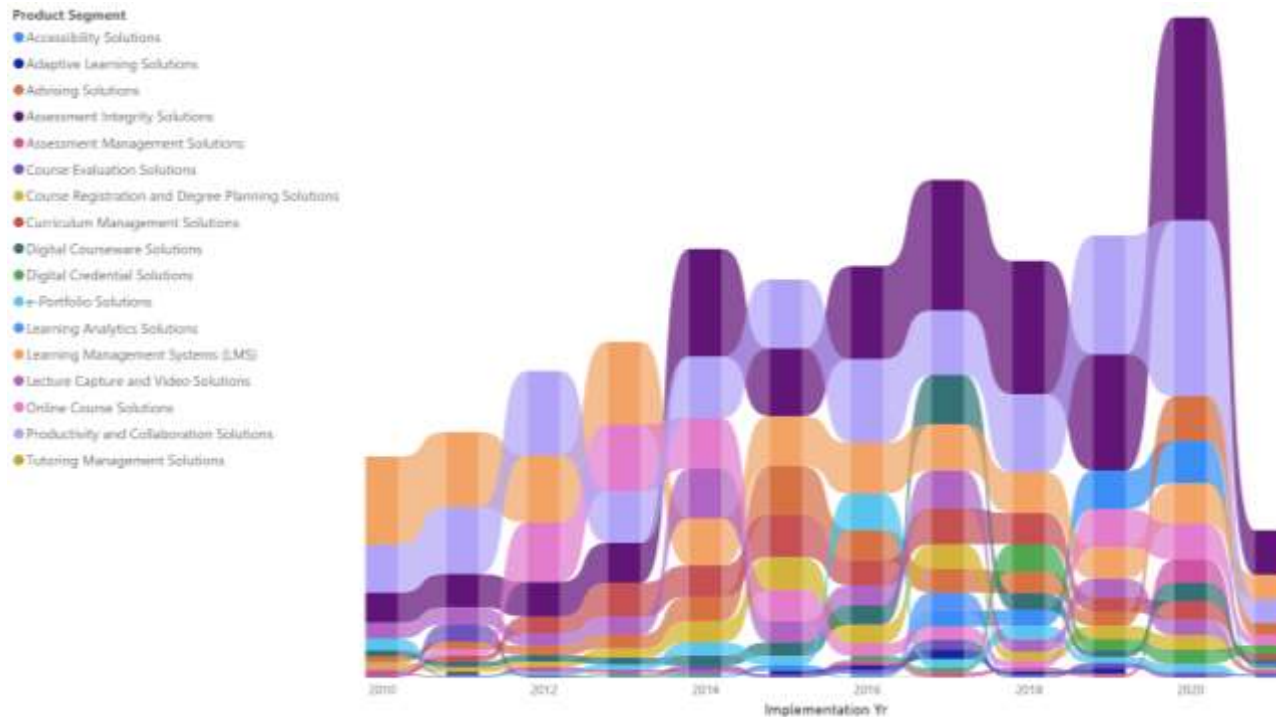
Implementation Trend Analysis

IMPLEMENTATIONS SINCE 2016: OVERALL



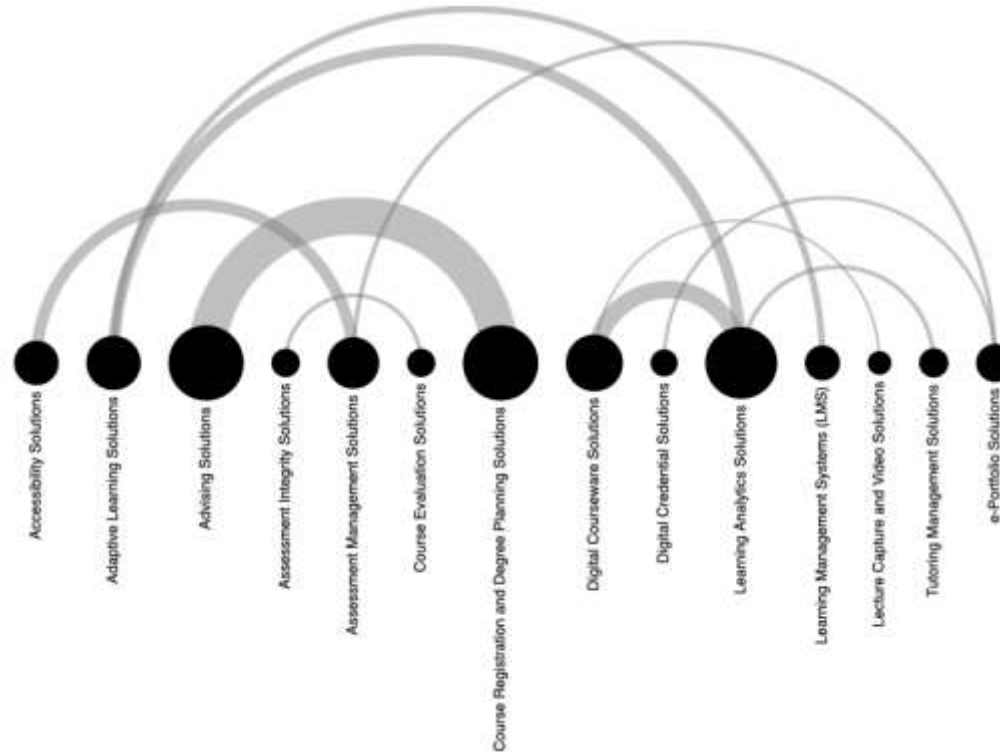
Implementation Trend Analysis

IMPLEMENTATIONS SINCE 2016: BY SEGMENT



Implementation Trend Analysis

IMPLEMENTATIONS SINCE 2016: CORRELATIVE SEGMENTS

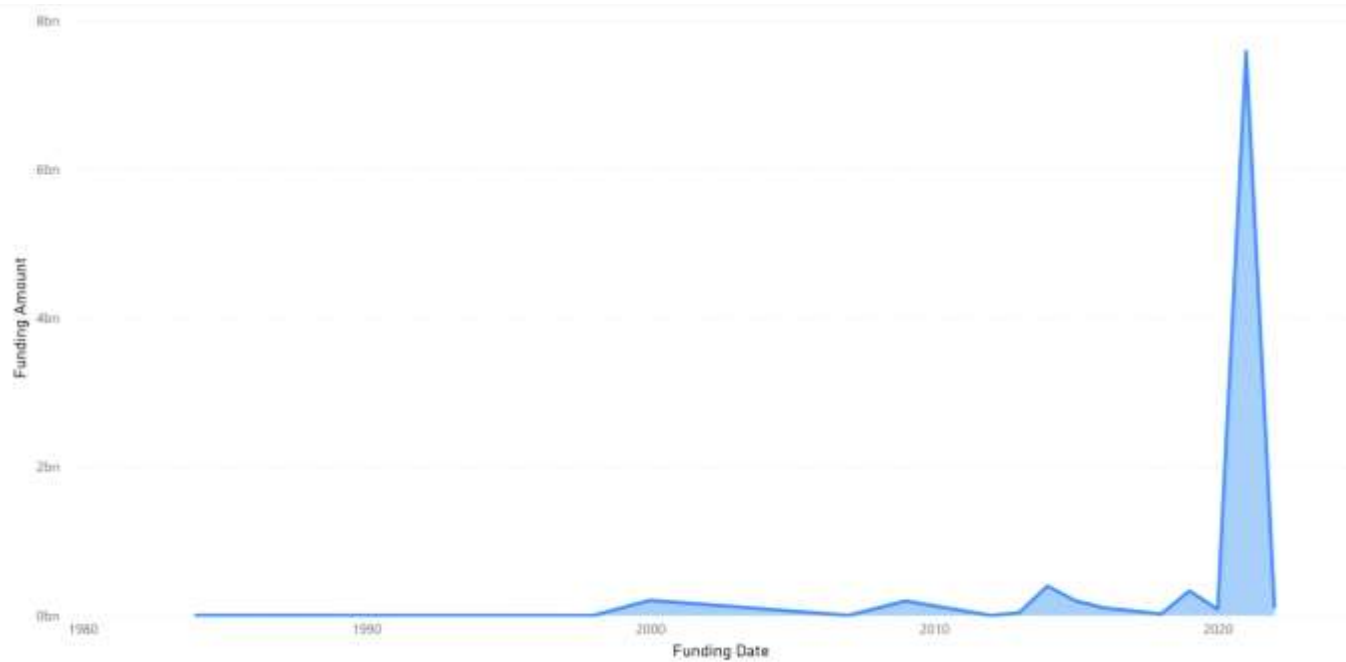


What can we see in
investment trends?



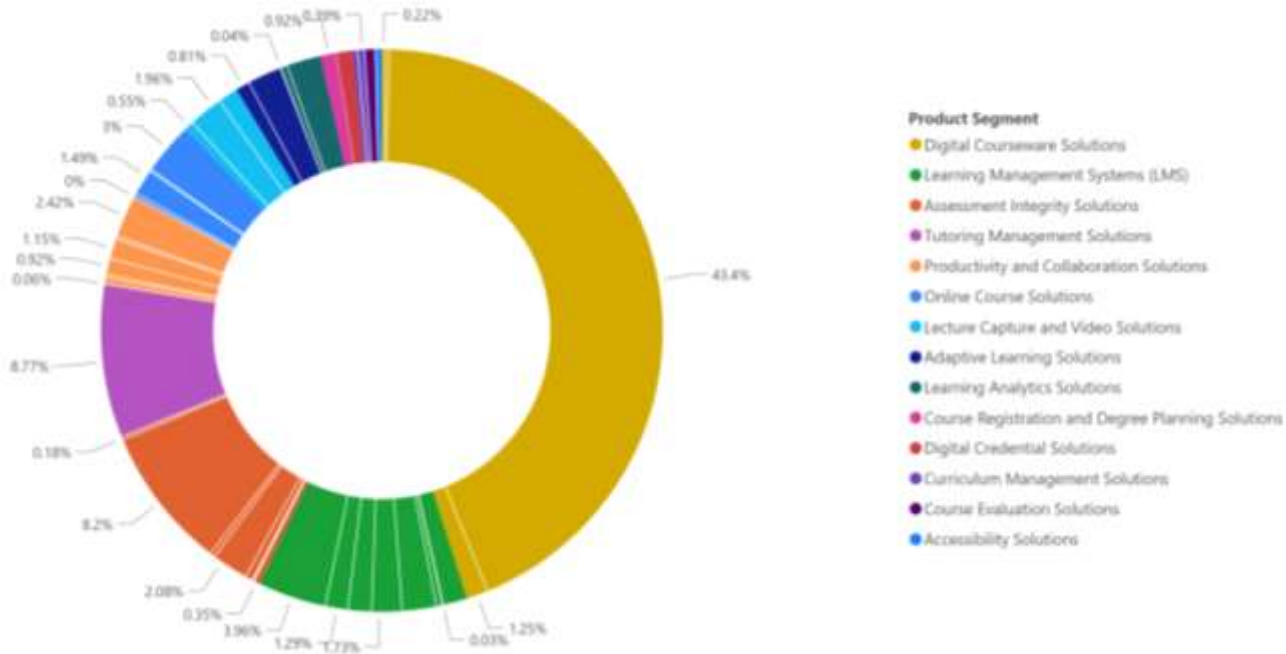
Investment Data Analysis

VENDOR FUNDING SINCE 2016: OVERALL



Investment Data Analysis

VENDOR FUNDING SINCE 2016: BY SEGMENT



What can we see in
expert analysis?



Expert Insight Analysis

MOST COMMON PREDICTIONS

AI for Learning
Analytics

AI for Learning
Tools

Hybrid
Learning
Spaces

Hybrid/Remote
Learning
Modes

Micro-
credentials

VR/AR

Online
Courses

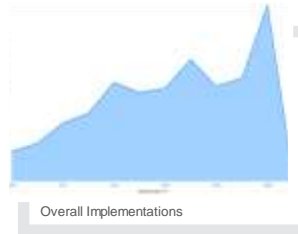
So, what can we say
about past trends?



What Can We Say?

READING TRENDS, INVESTMENTS, AND EXPERT ANALYSIS

- Implementations of segments in teaching and learning have increased steadily from 2010 and dramatically during the pandemic
- Assessment Integrity Solutions and Productivity and Collaboration Solutions have grown the most during the pandemic
- Investments in these all segments have increased, with the greatest increase occurring in Digital Courseware Solutions
- The most common predictions involve AI and Hybrid Learning



Can we make
predictions now?



Predictions: A Cautionary Tale

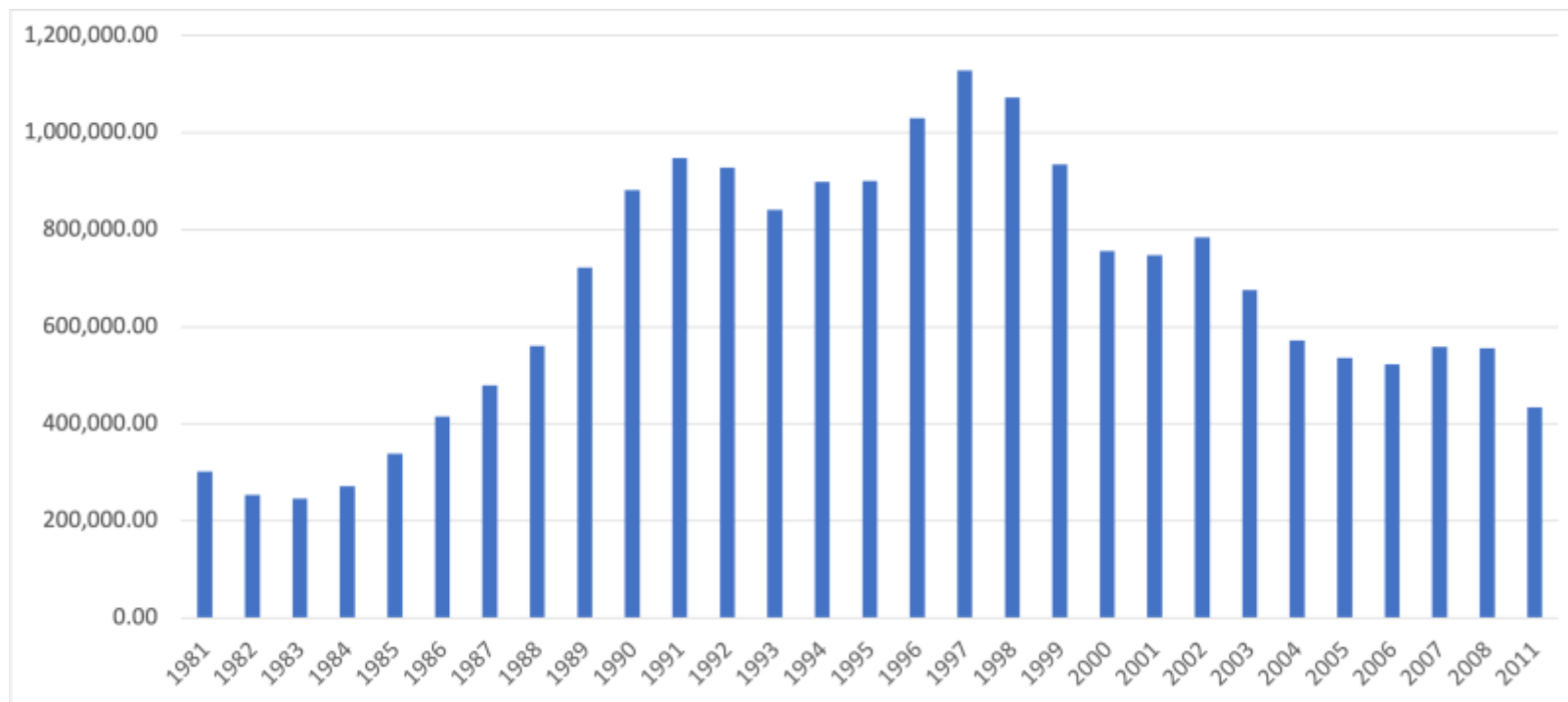
THE SONY WALKMAN/DISCMAN

- Launched in 1979
- Held a 50% market share in the U.S. for most of its existence
- Over 50 million units were manufactured in the first ten years after launch
- Discontinued in 2010



Predictions: A Cautionary Tale

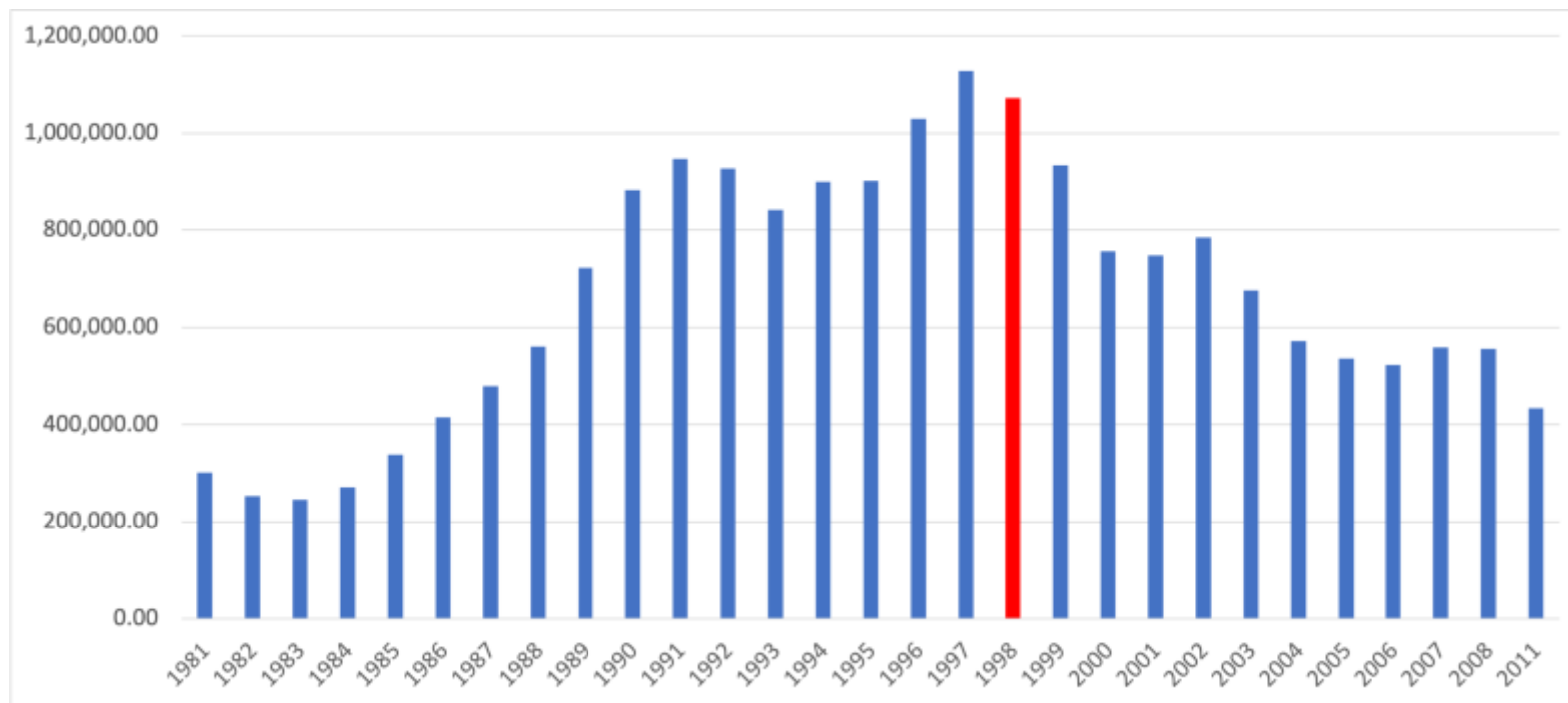
SONY'S SALES: OVERALL



Source: Sony Historical Audio Sales

Predictions: A Cautionary Tale

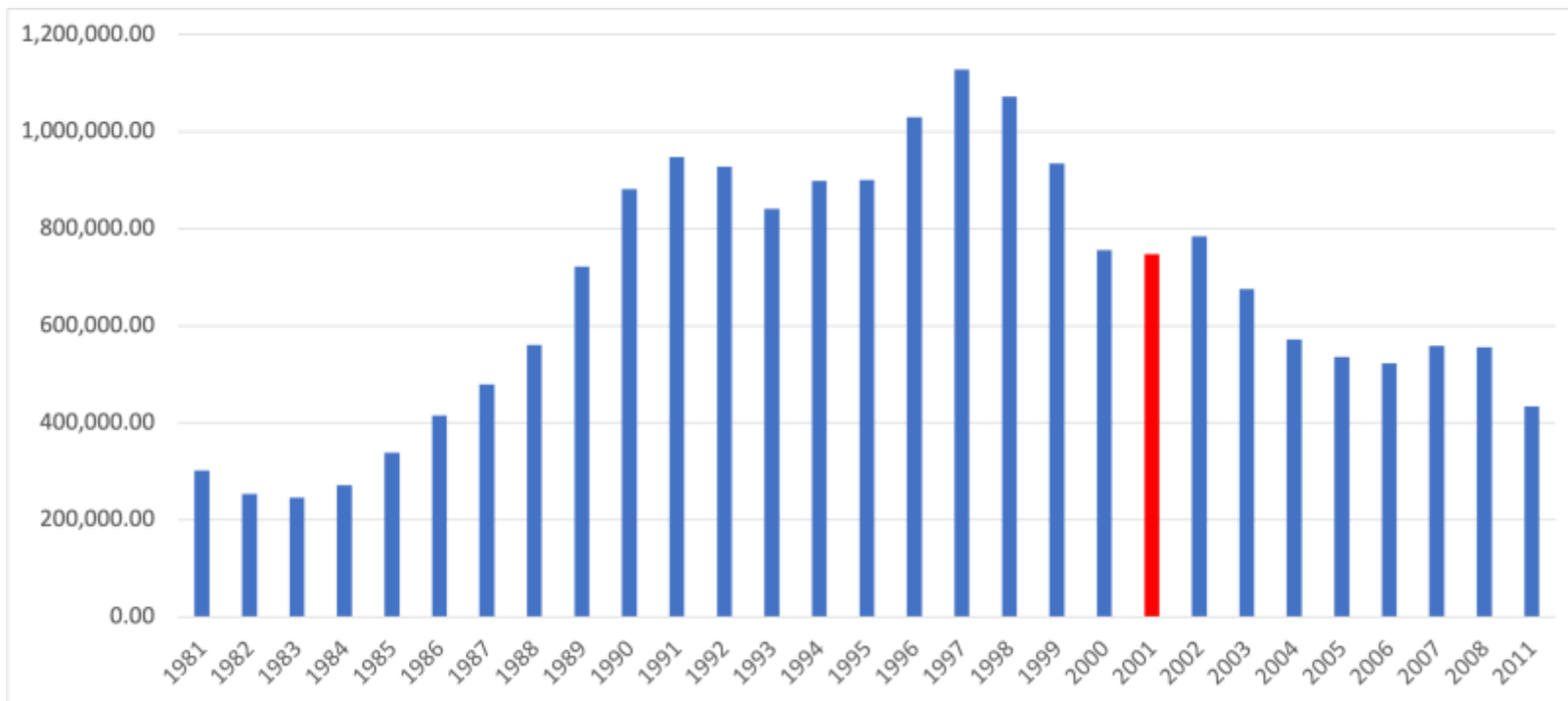
SONY'S SALES: MP3 IMPACT



Source: Sony Historical Audio Sales

Predictions: A Cautionary Tale

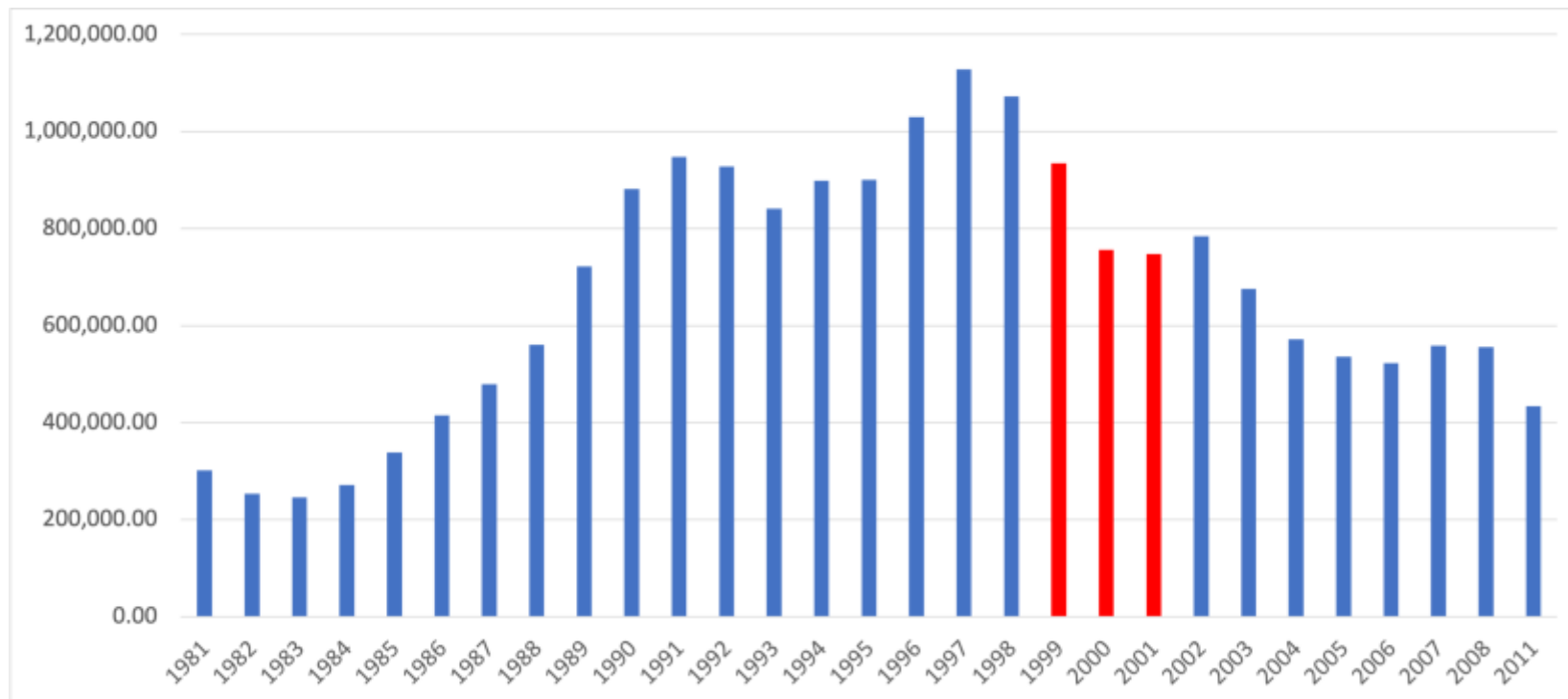
SONY'S SALES: IPOD IMPACT



Source: Sony Historical Audio Sales

Predictions: A Cautionary Tale

SONY'S SALES: NAPSTER (P2P)/ITUNES IMPACT

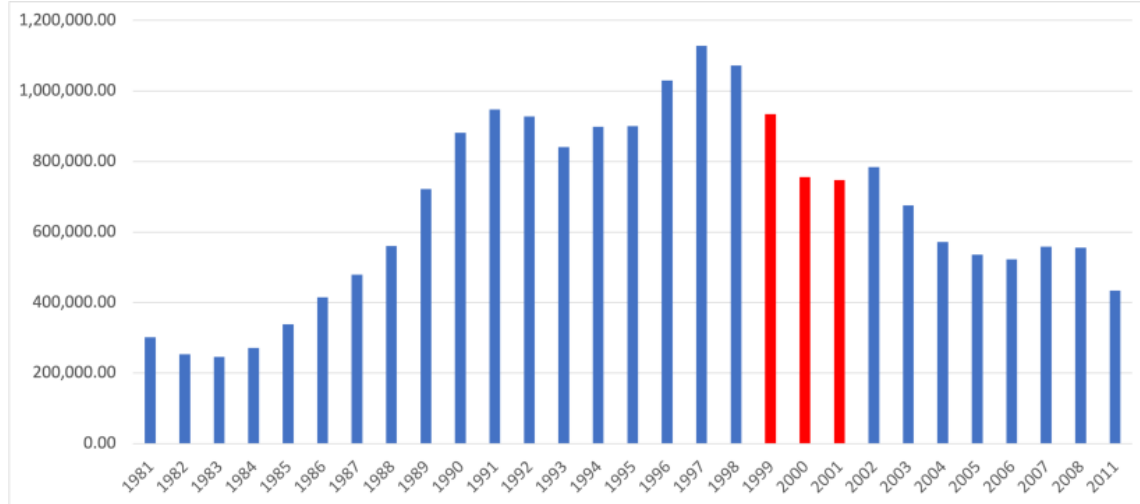


Source: Sony Historical Audio Sales

Predictions: A Cautionary Tale

LESSONS LEARNED

- There were some new technologies impacting Sony's product
- But the real impact came not from these technologies, but from technologies that responded to unmet user needs
- Users no longer wanted to be tied to bundles of content, but instead wanted to share, edit, and organize digital content
- How can we avoid the Walkman problem in higher education technology?



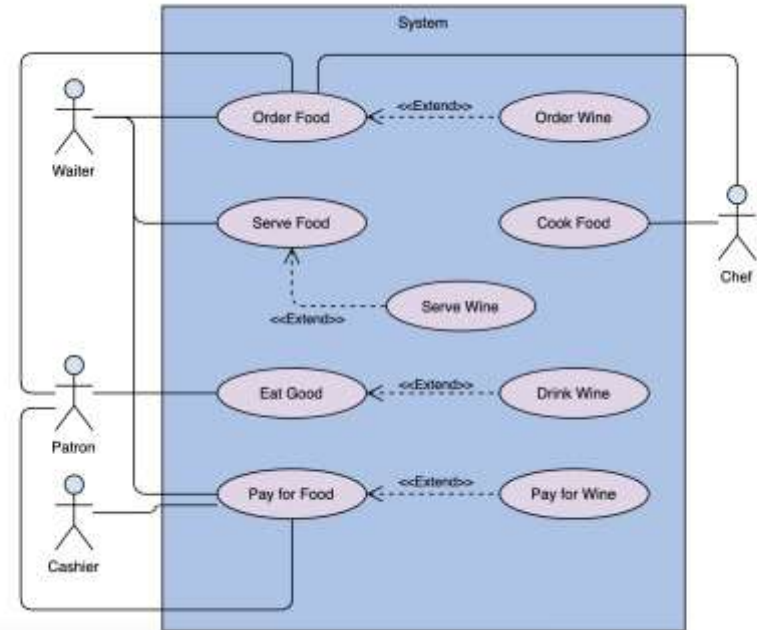
So, now what?



Rethinking Our Analysis

FUNCTIONAL VS PRODUCT VIEW

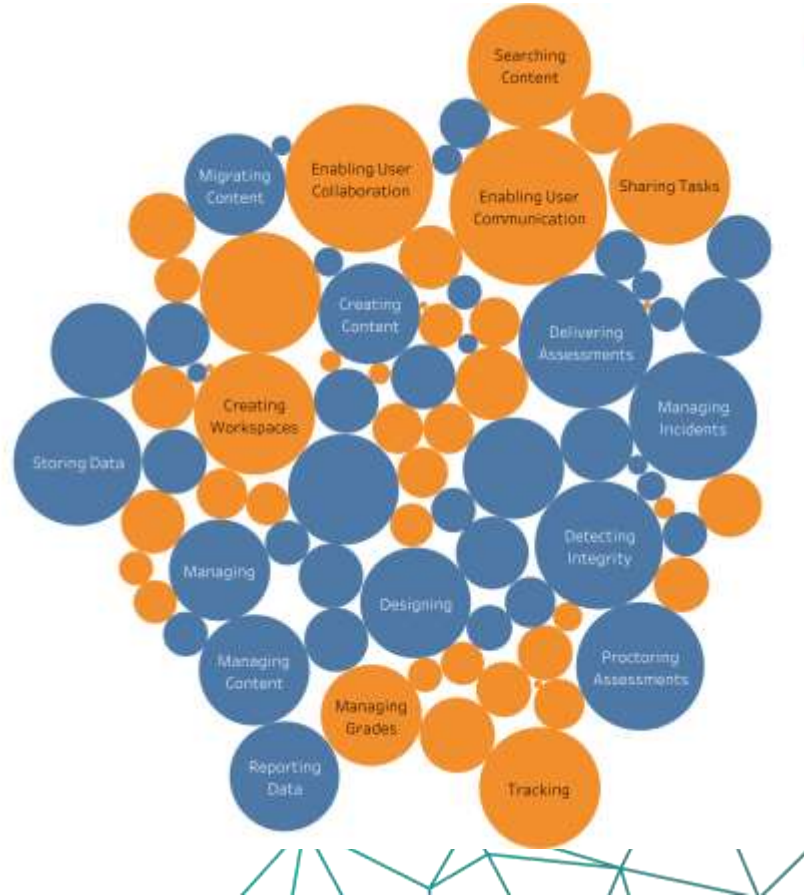
- Looking at technology at the product level provides some insight into why users select technology
- A more accurate way, however, is to look at which functions technology segments
- This way we can better see how users select technology based on their needs



Rethinking Our Analysis

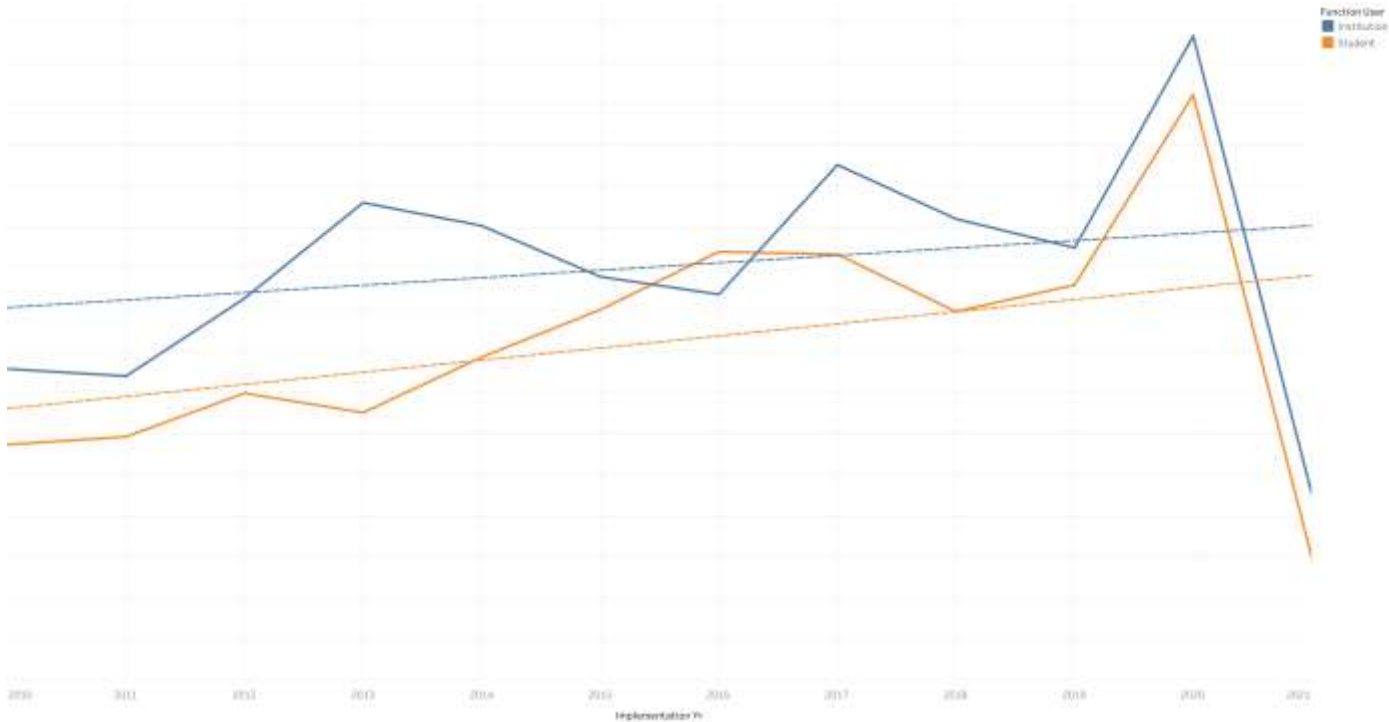
CLASSIFYING FUNCTIONS BY USER TYPE

- Based on our Landscape work, we have identified functions for all segments and classified them by user type
- Classification depends on the primary user of the technology



Rethinking Our Analysis

EXPLORING IMPLEMENTATION BY FUNCTION AND USER GROUP

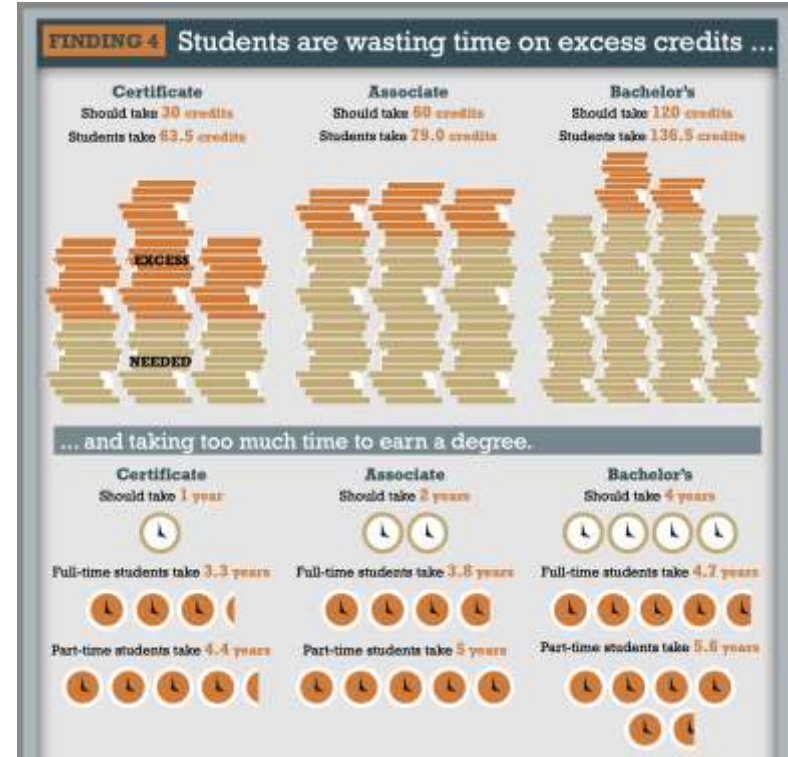


Source: LISTed Tech

Rethinking Our Analysis

IDENTIFYING STUDENT NEEDS

- Student are finding challenges as the progress along their teaching and learning journeys
- Evidence of these challenges appear in the percent of students who graduate with excess credits and in too much time
- Solving this challenge requires support for student pathways



Source: Complete College America

Rethinking Our Analysis

UNDERSTANDING UNMET STUDENT NEEDS

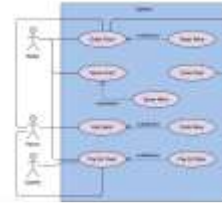
- Supporting student pathways requires solutions that provide functionality in two main areas, i.e., personalization and decision-support
- Implementation of solutions that provide these functions have been relatively flat since 2010
- Therefore, solutions that offer these functions are primed for growth



Rethinking Our Analysis

ADOPTING A NEW APPROACH

- We moved beyond product-level implementations and vendor investments
- By doing so, we can see there is one user type (student) and two sets of user needs (personalization and decision-support) overlooked in implementations since 2016
- We predict that products supporting these two sets of user needs will increase in implementations over time, *if institutions increase their focus on addressing these student needs*



Leveraging Software Functions



Classifying Software Functions



Analyzing Implementation Trends



Identifying User Needs

Examples of Personalization/Decision-Support



Examples

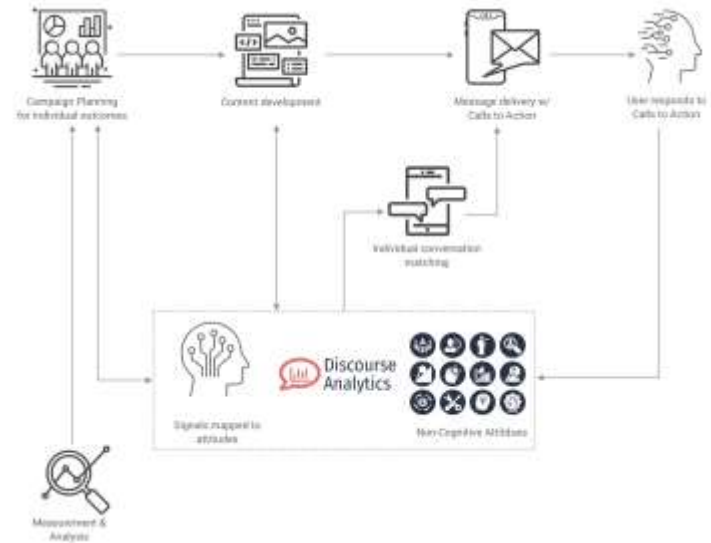
PERSONALIZATION: LEARNING EXPERIENCE PLATFORM



Source: <https://joshbersin.com/2019/06/learning-technology-evolves-integrated-platforms-are-arriving/>

Examples

DECISION SUPPORT: STUDENT JOURNEY MANAGEMENT SOLUTIONS



Source: Discourse Analytics

In Closing

KEY TAKEAWAYS

- Reviewing trends by products and implementations is useful but may not help us avoid the “Walkman problem”
- A better way is to ascertain users their unmet user needs and leverage these to gain insight into trends and form predictions
- We see products offering personalization and decision support as poised for the most upcoming market growth



Additional Resources and Q&A

encoura® Eduventures® Research

2022

Tech Landscape

Released in July, the Eduventures 2022 Higher Education Technology Landscape (Landscape) visualizes **367 vendors and their products**, organized into over **44 separate market segments** rolled up into four major categories aligned to the student lifecycle.

Our forthcoming 2022 Landscape Report will dive more deeply into the new segments, standout vendors, and how other trends impact the Landscape.

The 2022 Landscape Report will be available later this month.

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Understand Why Students Chose – or Did Not Choose – to Enroll at Your School

Eduventures designs, hosts, and analyzes an online survey of admitted students on behalf of our members.

Deliverables include:

- Initial frequency report of your institution's responses
- Tailored analysis to inform your institution's yield and marketing communications strategy
- Facilitated discussion for you and your enrollment management team to understand the marketing, recruiting, and student experience implications of your results

STARTING IN JANUARY Rolling Deadlines

Session 1	January 9, 2022
Session 2	February 6, 2022
Session 3	March 6, 2022
Session 4	April 10, 2022
Session 5	May 8, 2022

UPCOMING WEBINARS

Is the Allure of High Price/High Discount Tuition Models Fading?

Thursday, November 10 at 1pm CT/2pm ET | encoura.org/webinars



Kim Reid
Eduventures Principal Analyst



June Claughton
Quantitative Research Analyst

