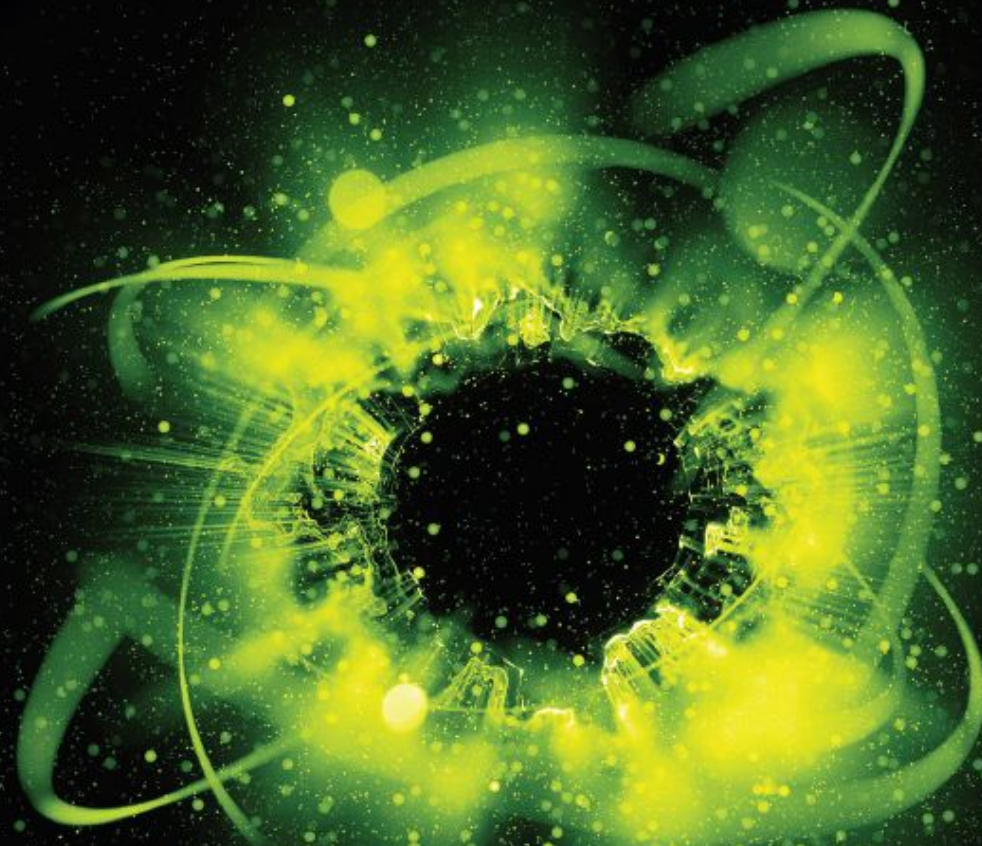


Fostering Innovation in Education

The Australian EdTech
Market Census Unpacked

JUNE 2020



Deloitte.   EduGrowth

Before we start.



We ask all participants to turn off their video



We invite you to raise questions via the chat box at any time



All mics will be muted during the webinar presentation



Keep your phones close by for an interactive live survey

EduGrowth and Deloitte have partnered to understand the current Australian EdTech Market.



We first partnered in 2017 to produce the Australian EdTech Census . The Australian EdTech Census 2019 aims to refresh the findings regarding the Australian ecosystem and reflect on the impact that updates to policy, emerging technology trends, and the changing nature of work is impacting the Education sector.

Here's who we spoke to.

We surveyed start-ups who currently run an EdTech company or have an idea they plan to launch in the next 6-12 months, as well as individuals and teams who are involved in the broader EdTech sector.

168
Responses

69% of the respondents are running an EdTech company



13% of the respondents have an idea for EdTech company



18% of the respondents are not an employee or founder of an EdTech company





Pulse Check.

We'd like to take a moment to check-in with you through a survey.

A photograph showing two people from behind, sitting at a desk and looking at a laptop. The person on the left is a man with dark hair, wearing a dark shirt. The person on the right is a woman with her hair in a braid, wearing a white top with orange patterns. The desk has a laptop, a pen holder with pens, and a grey folder. The background shows a window with curtains.

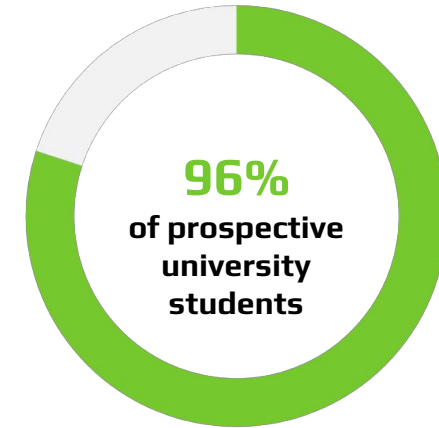
The world has changed drastically since we released our findings in February.

Overview

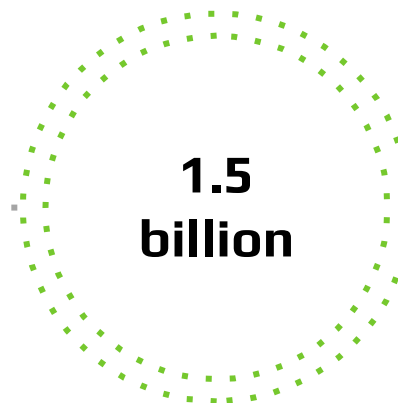
COVID-19 has brought huge social and economic impacts across all sectors and all geographies.



Were forced to close down all schools nation-wide.



Said that missing out on the physical campus experience (face-to-face classes, in person co-curricular activities, and working) was a major concern.



Affected learners across pre-primary, primary, lower-secondary, upper-secondary and tertiary education levels.

Education institutions have been forced to think quickly about the impact.



Remote learning

Digital divide

Virtual support

Spotlight | VYGO



800% increase in users compared to the same month last year.



Active users from 22 countries.

Spotlight | EDUCATION HORIZONS GROUP



24% increase in uptake of the 'myEdOnline' platform with an additional uptake of 120 schools in March alone.




Increased need for virtual support services to promote engagement and well-being

**This has
accelerated the
need to reimagine
the Education
landscape.**



How might we harness the learnings from recent disruptions?

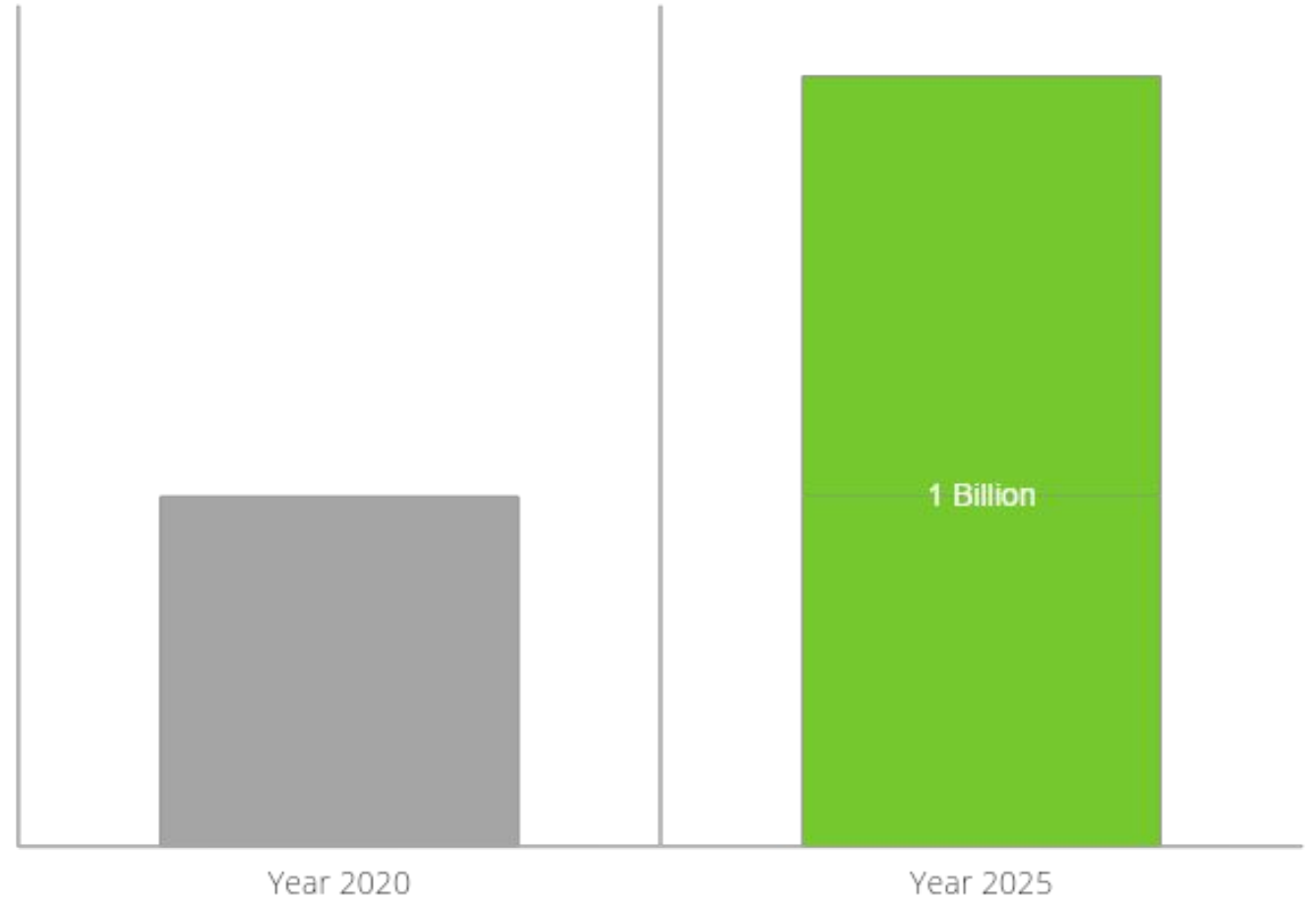
A woman with her hair in a bun is sitting at a wooden desk in a modern office. She is looking at a laptop screen. On the desk, there are several other devices: a tablet, a laptop, and a large monitor. The monitor displays a website with a grid of text and arrows. There is also a small potted plant and a blue folder on the desk. In the foreground, the back of a person's head and shoulders is visible, looking towards the woman at the desk.

Now with this
lens, let's dive
into our findings.

Australian EdTech Census 2019

**Deloitte Access
Economics
predicts there
will be 1 billion
students across
29 international
markets by
2025.**

Over **1 billion students** worldwide will be actively seeking education and skills by 2025



* Note: this statistic refers to the international education market opportunity.

Source: [Deloitte \(2015\) Growth and opportunity in Australian International Education](#)

EdTech plays a significant role in Australia's economy.



A critical **enabler** and differentiator of our **third biggest export**



A globally relevant **investment opportunity**



A **creator of jobs** and boost for employment

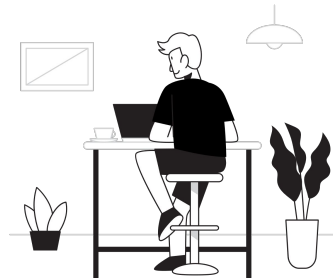
2019 findings.

TREND #1



From 'start ups' to 'scale ups'

TREND #2



Future of work is gaining traction

TREND #3



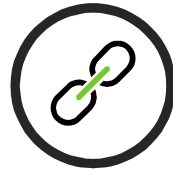
Global expansion is top of mind

TREND #4



Challenges shift to new markets and finding talent

Some thoughts about the implications around emerging technologies.



BLOCKCHAIN



ARTIFICIAL INTELLIGENCE



API ECONOMY



LEARNING ANALYTICS



DIGITAL REALITY

The future of the Australian Ed Tech Market.



Role of EdTech market



Harness innovations

Thank you.



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