

STRATEGIC ANALYSIS OF EMERGING ONLINE TUTORING PLATFORMS IN INDIA**A. Challa and N. Anute**

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ABSTRACT

The main objective of writing this research paper is to identify the scenario of the online tutorial platform and opportunities, challenges ahead. Innovation in education plays a crucial role. In today's technological era, chalk- and-Talk method do not work to make the student creative. In order to move with technology and children, teachers need to upgrade themselves and shift away from traditional teaching methods to modern methods. The world is on fingertips students can access the information from anywhere in just one click. Due to various features- oriented educations applications students can learn at their pace and take their time to understanding things. E-learning encourages the students to explore more and makes the learning interesting. In India, many schools are moving towards the virtual reality by offering online correspondence courses to the students. Children love using laptops, and mobiles, schools and parents need to create awareness about the best educational applications which can build their future. And in this research paper has shown about the Top 5 educational applications in India which are helping the learners and setting a new standard in this growing market.

Keywords: Education, E- learning, Innovation, Educational apps

Introduction

Education enlightens the person and shows the right path. It increases knowledge and enriches the thinking ability. With the increasing technology students as well as teachers need to be creative to implement an innovative method in education by using the technology called online tutoring.

Today, everything became online, from ordering food to pay bills, then why not the education couldn't be online. With the increasing technology online tutorials are taking raise day by day. In early 21st century students used to attend the classes as the question mark, but now with the help of technology students can find their teacher who matches their needs. Online tutoring (or) e-tutoring is a platform where tutor teaches to tutee through internet. It's a cost-effective and flexible enough, so that anyone can access 24/7, the platform adopts different methods to reach out the students which consists (Live classes, Webinars and many more).

Online tutorials are self-paced, so student can learn anything from anywhere at any time. Though there will be no face-to-face interaction with each other, it allows the students to take their required time to understand the things, helps the students to develop positive attitude towards the education and feel fun-loving to attend the classes.

Many educational institutes in India choosing online tutorial as an alternative platform to engage the students in and outside of the classroom. Many researches have shown that online tutorials help in increasing the students in mental-ability, flexibility, and problem solving skills which can help them in future career.

Many researches showed that over the past one year usage of educational application is used by the students is grown by over 217%, Students considering the online tutorials as a mainstream for the education. The rise of cloud computing is being witnessed in online education platforms. With the increasing penetration of smart phones and internet In India led a speculative customer base to E-learning applications. Though the traditional education system is still in the form in India, many institutions and colleges are stepping towards online education for skill development and for other services which is not available in their premises. More than 77% of higher education students opt for the online tutorials for understanding the lessons, test preparations and for skill development.

Students found some important educational applications like (BYJU'S, Unacademy, Vedantu, Khan Academy and White Hat Jr.) very promising to improve their academic as well as practical knowledge. These online tutorials are making progress in this

competitive market by adopting the incredible technology like Artificial Intelligence, Block Chain and Data Analytics to improve the learner's experience, and they were grabbing the attraction of the learners by giving value added services like internships, live projects and career counseling sessions by the special mentors. Trends like, "Gamification" brought a high growths rate in student's engagement and focus.

Apart from the academic syllabus learners also gain knowledge on their interesting topics, and willingness to acquire some learning technologies and practices, students are relying on the meaningful content where they can find the more information. Nevertheless, Indian education institutes also recommending the Ed-apps for their students to increase productivity and flexibility in learning. These apps market are segmented based on solutions as Pre-primary, primary, and secondary education, and based on platform such as iOS, android and windows.

The facilities like storing videos, audios and notes are encouraging the learners to adopt the educational apps. Users believe that these apps also offers various benefits such as flexible schedule, lower cost, less time consuming, and eco-friendly.

According to 2022 education apps market report, one drive growing demand for STEM apps, as many of the students are opting for the STEM subjects.

Based on some researches, online education in India expected to reach INR 360.3 billion by 2024, expanding at a Compound Annual Growth Rate (CAGR) of 43.85% during the 2019-2024 periods. And the online primary & Secondary supplemental education in India expected to reach INR 123.65 BN by 2024 expanding at a CAGR of 46.48% during the 2019-2024 period, most of the demand from tier II-tier III cities are driving the growth of this market.

Enhanced in increasing technology and infrastructure gives raise to penetration of digital payment methods, by this online test preparation market is expected to reach INR 94.75 Bn by 2024, expanding at CAGR of 50.84% during the 2019-2024 period. The exponential increase in these stats shows that online tutorials are growing at unprecedented

rate. Students from 1st to 5th class spent 32% and students from 6th to 8th class spent 15% more time studying online.

Accordingly, we can say that how the online tutorials bringing a change in Indian traditional teaching methods and setting a strategy in the market. In future, online tutorials are set a very important place in every educational institute all over India.

Literature Review

1. Wessam Al Chibani, (2014), in his research paper entitled "The Effectiveness of online and one-to-one tutoring in the writing centre on the students achievement: a multiple case-study", mentioned students who worked one-to-one or online can noticeably see the improvements than the students who relied on the traditional classrooms and he also mentioned that students who worked online scored a highest marks.
2. Adnan Majeed, (2015), in his research paper entitled "Mobile Learning and Education" in this he mentioned that online education and apps helping the students to enhance their skills by asking questions to the teachers without hesitation. Sources like E-books, Magazines, E-materials and video lectures helps the students to read and listen at any time.
3. Kristen Diliberto-Macaluso & Alan Hughes (2016), in their research paper entitled "The use of mobile apps to enhance student learning in Introduction to psychology" showed that after the excess use of mobile phones and internet online educational apps set a standard in every student's life. They also mentioned that students who are using the online apps are highly responsive and actively giving answers than compare to other students.
4. Dr. Yatendra Pal & Ms. Riddhi Agarwal, (2017), in their research paper entitled "Use of Educational App in Classroom Teaching", stated that influence of technology upon children and education has been immense. And they also mentioned that educational apps are making things easier for children to understand. Apps are the wonderful tools to engage the kids in studies and in other

brain activities, it extend learning and allows the children to move at their own pace.

5. Ramya Gangaiamaran & Madhumathi pasupathi, (2017), in their research paper entitled “Review on use of mobile apps for language learning” mentioned that Students are acquiring the Listening skills than any other skills and also mentioned that how the mobile apps can be studied with the perspective of self-access learning. Through self-access learning students can determine when and where to learn with the online resources.
6. Mohd Shoaib Ansari, (2017), in his research paper entitled “An investigation of mobile learning apps in higher education in India” mentioned that mobile learning apps can engage student with their learning environment at anytime and anywhere and he also mentioned, In terms of effectiveness, almost 42.64% respondents find mobile apps very effective whereas 34.64% students finds it effective.
7. Shahjad & K. Mustafa, (2019), in their research paper entitled “ A trendy analysis on learning apps research” mentioned that Learning apps support 4C’s (Communication, Collaboration, Corporation and Creativity) & 4S’s (Speed, Simplicity, Security & Sharing).
8. Ms. Vaishnavi Khandelwal, Dr Robi Augustine- (2019), in their research paper “Effectiveness of Educational Applications and websites on students”, stated that, widespread of internet access by people e-learning is witnessing a massive growth, and there are many educational applications have been introduced for the purpose of learning. With the growth in technology both students and teachers prefer to online applications, to implement the new concepts.
9. Sruthi Palliyalil & Dr. Sandeepa Mukharjee - (2020), in her research paper entitled “BYJU’S – The learning app: An investigative Study On the transformation from traditional learning to technology based personalized learning”, in that she mentioned Byju’s is India’s largest educational app with over 3, 00,000 annual subscriptions, and one of the most valued

Ed-tech companies in the world, has played a major role in transforming Indian education scenario.

Importance of online applications in India

Self-Learning

It’s really difficult to the teachers to focus on only one child in the class. Online tutorials are helping the students to cover the topics which weren’t taught in the classroom. Without feeling tense student can finish the topics by taking the required time. These online applications are bringing confidence in the children and making them more focused.

24*7 Accessible

With the help of 24*7 access students can clear their queries and get their study materials from anywhere at any time. These apps are always available for the students without having any time schedule.

Online learning resources

Although there are physical libraries everywhere, smart phones became a main resource for accessing any kind of information from with just one click. These applications became a platform for the students who cannot allow the access of full-time education by providing pdf’s and e-books.

Learning is a fun

With the help of “Gamification” applications are making learning fun and entertaining. It also increases the student’s engagement. By giving the badges and rewards to the students these Ed-apps are motivating the learners and creating a positive attitude towards education.

Improving technical skills

Educational applications are helping the students to develop the technical skills at early stage. With the help of some apps even school kids are learning the coding language, and building a foundation for future IT work.

Cost Effective

Compare to campus-based education online tutorials are cost effective and students can save the money.

Enhancement of parent teacher communication

Advent of mobile applications the relationship and communication between the teacher and parents became strong. With the help of

mobile apps parents can directly interact with teachers and can ask any kind of queries regarding the courses. This brings transparency in the education and parents feel more trustworthy.

Research Objectives

- To study the present scenario, of selected educational apps in India.
- To study the transformation of the traditional education to the modern education through mobile applications in India.
- To study the growth of educational apps in India.
- In order to study the different opportunities and challenges having by educational apps in India.

Research Methodology

This research paper is based on secondary research. The data is collected from news articles, blogs, educational websites and some research papers. This research paper is mainly focused on strategic analysis of online tutorial applications.

1. BYJU'S

BYJU'S is the top education tutorial app in India launched in August 2015 by Byju Raveendran. It offers an engaging, and highly effective learning content for the children in LKG, UKG, K-12 and for the students who are preparing for competitive exams like NEET, IAS, and JEE. At present the app has 70 million registered students, and around 4.5 million paid subscriptions. This app has become the most preferable educational app across the globe by assigning a whole new way of learning through visuals. It is an India's most loved educational app with delivering world-class education to their students. BYJU's app is designed as per unique learning style of every learner based on pace, style, and size of learning and paving the way for new-age learning tools. BYJU's having a Bollywood celebrity Shahrukh Khan as its Brand Ambassador.

BYJU's is one of the top recognized Indian Ed-tech brands making its presence not just within the country but across the globe. To extend its trace BYJU's acquired US-based

learning platform Osmo in 2019. In June 2019 BYJU's tied-up with US-based media tycoon Disney and launched the Disney-BYJU's early learning app for the kids aged six to eight, in the domestic market to entertain them with popular characters and stories from Disney classics. This platform have been a funding binge and rose \$969.million from various investors so far. During this pandemic, BYJU's took a positive step and made its learning app free for the students till the end of APRIL 2020 to provide an uninterrupted learning to their students and gained new 13.5 billion subscribers in the platform.

Over last few years trend of online education has increased in India, taking this as an opportunity BYJU's targeting major segments i.e. Semi-urban and Rural areas. The new education policy has set a prominence on online education even the Indian Government also completely supporting it this became the major advantage for BYJU's. During this pandemic along with other sectors educational sector also affected massively. It has given great opportunity to this platform to increase its market. Further this Ed-tech platform is planning to provide the classes in technical, professional, coding and extra-circular activities.

The main challenge of this platform is BYJU's business model can easily intimidated by new start-up. As most of the students unwilling to pay the amount of money offered by the BYJU's after the completion of "freemium" model because of this app might lose active learners. Another important challenge for the BYJU's is competition. This being an era of online education there is always a threat from competitors such as (Vedantu, Khan Academy, Toppr, Meritnation, Simplilearn).

2. Unacademy

Unacademy is another important Bangalore based Ed-tech educational platform in India. In 2010 started as a Youtube channel and officially launched in 2015 by Gaurav Munjal. This platform provides content for vital competitive exams in the form of short videos on different topics which can be available for free as well as also provides a study material for the aspirants to better prepare for competitive exams and promote self-learning.

The Unacademy app is available for 10+2, CAT, GATE and UPSC students, consisting of over 10,000 registered educators and 13 million learners. Unacademy group's comprises Unacademy subscription, let's crack it brands, Chamomile Tea with Toppers and wifistudy.

Unacademy is a newborn 'Unicorn', steadily surging its subscribers on the app as well as on the youtube. It offers over 2,400 lessons covering topics from variety of subjects for competitive exams. Unacademy youtube channel witness over 250 million views for their videos as well as this platform consists thousands of online educators. Unacademy also holds some prominent educators such as Kiran Bedi under its concept, this Ed-tech platform making progress gradually by reaching all the four corners of India to empower the youth.

Owing the current scenario Unacademy announced 20,000 live free classes for the all its existing learners and new users. Further this platform attempts to extend more focus on coaching centers which is popular among Indian society. In July 2020 Unacademy acquired Chandigarh-based Ed-tech Startup PrepLadder specializes in courses aimed at medical aspirants in India. With the support of corporate giants like Facebook, General Atlantic, and Sequoia Capital this platform was finding well itself, this is a supreme opportunity to take its business to greater heights.

The main challenge faced by this Ed-tech platform is 'Data leakage' – According to some important reports, the data base of 22 million learners including professionals of Wipro, Infosys, Cognizant and Google was hacked and went up for sale on Dark Web on January 2020. Unacademy's top competitors are Toppr, Khan Academy, Firefly, Tutorvista and iTutor Group.

3. Vedantu

"Vedantu" this word is originated from Sanskrit, "Veda" means Knowledge, "Tantu" means Network. It is one of the top leading online tutoring platforms in India. At the beginning, the company stated as a joint-venture with Bangalore-based Vedantu Innovations Pvt. Ltd in 2011. Later in October

2014, this company officially launched an online learning platform by three IITian friends namely Vamsi Krishna, Anand Prakash and Pulkit Jain. This platform offers Live lessons to their learners with qualified teachers it has 500+ instructors who have taught more than millions of hours for 40000+ students across 1000+ cities from 30+ countries. Mainly, it provides a service for ICSE and CBSE ranging from 4th to 12th grade across India and in the Middle-East. This platform also claims to provide test preparation courses for IIT-JEE, NTSE, PSE and also for International Mathematics Olympiad and National Science Olympiad. Best features one can find in this platform is, students and teachers can interact with each other in live.

In 2019, vedantu launched its "WAVE" platform which adopts AI and Machine Learning to overcome the main challenges faced by Ed-tech platforms which generally witnesses low completion rate of courses because of low engagement. This is tackled by Vedantu which improves its focus on live interactive classes for making its classes more interactive. During lockdown, this platform have recorded a growth of 220% with more than 2 million students participated in the live classes as well as it has took up the initiative to provide Free Live interactive classes including content for Grade 1-12 and for competitive examinations such as JEE/NEET. As per the report by Economic Times vedantu is the second most valued firm in India's Ed-tech sector.

As per Livemint report, Vedantu invested \$2 million in Ed-tech company named Instasolv, which resolves the doubts for high school, IIT-JEE and NEET students, as augmentation towards doubt solving. Backed by marquee investors Omidyar Network, Accel, Tiger global management and GGV capital on board, each month vedantu profess 1,50,000 students on live in its platform.

The main challenge faced by this top Ed-tech platform is the threat for data and other main challenge is competition in the market. The main competitors of vedantu are BYJU'S, Meritnation, Toppr, Worldscool and simplilearn.

4. Khan academy

Khan academy is a non-profit educational organization started in 2008 by American educator Salman Khan, with the goal of creating set of online tools that helps to educate students. This platform has more than 10,000 video lectures on different academic subjects majorly focused on Mathematics, science, History, Art, economics and including K-14 and test preparation such as (SAT, Praxis, LSAT) content. This platform is free for both the students and teachers include 1000's of interactive exercises, materials and videos which covers a range of k-12 subjects. There is more than 18 million learners use khan academy across 190 countries and more than 40 languages. More than 2 lakh educators use their free teacher tools.

In the past 13 years, this platform has grown rapidly. Khan academy partnered with NASA, MIT, and the modern museum of art for specialized content to empower the learners outside the classroom as well. During this pandemic khan along with his team designed daily home schooling schedules mixed of online learning, personal writing, and offline reading and taught the children about social distancing via Google meet, Zoom or Skype.

The main challenge faced by khan academy is, as everyone can access for the site, there might a loss of data. And challenging competitors such as BYJU's , Meritnation, Unacademy, Toppr.

5. White hat junior

White hat jr. is a Live 1:1 online educational platform incorporated in 2018 by Karan Bajaj. This platform teaches the fundamental of coding structure and algorithm thinking for generating a creative outcome from kids. This platform targets the kid's age group of 5-12 to teach coding skills and shaping them as consumers to creators. White Hat Jr. has a prominent Bollywood celebrity Hrithik Roshan as a brand ambassador.

In the pre-lock down period, White Hat Jr observed a massive growth in their platform; revenue went from Rs. 1 crore to Rs.10 crores. Since the lock down the value started increasing. Before the acquisition of BYJU'S in the month of June, the revenue rate was \$75

million dollars but after 1 month it rose to \$220 million.

The company is rising with only-women teacher base in India. As this platform planned to add 22,000 teachers, and now giving opportunities to around 220 teachers a day. The main challenge facing by White Hat Jr. is students disconnection, due to heavy fees most of the students unaffordable to pay the fees. And the top competitors of company are coding blocks, coding with kids and camp 12.

Findings

1. BYJU's mission is to make the students fall in love with learning; this app mainly focuses on mathematics and science where the content is visually explained by using modern digital animations and illustrations.
2. Unacademy's main vision is to create the numerous courses in multiple languages for students all over the world.
3. Vedantu offers the students friendly and enthusiastic teachers which can match their level so that every student can understand.
4. Khan Academy mission is to provide a free worlds education for everyone across the world. This platform believes that Videos, material, and practice in combination helps the students.
5. White Hat Jr. Aims to teach code to kids with core programming skills, it is designed to stimulate creativity, problem solving skills.

Based on the observation, there is a huge competition among these apps. And all these platforms are working for the growth and development of the students across the world.

Conclusion

In this research paper we have shown that the growth, opportunities and competitors of these educational apps. The main challenge is observed in the whole research is learners are stepping back because of the price offered by these platforms, for that all the apps are working on the same goal that to provide an education to their learners. Apart from this, also faced many controversies on social media, but with their win-win mentality they overcome all these challenges, and focusing on the future opportunities which can bring a revolutionary change in the Indian education.

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