**Market Research Report**

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**Target User Group**

Struggling College Students in Lecture-style Courses — students in large lectures who can’t easily ask questions in real time; often lose the thread when the instructor assumes prior knowledge.

**User Group Profile**

Demographics & access

* The U.S. had ~16 million undergraduates in Fall 2024 (up ~4.7% YoY), a strong proxy for our overall TAM.
* Mobile access is essentially universal for our core demographic: 98% of 18–29-year-olds own a smartphone, and ~21% in this age range are “smartphone-dependent” (no home broadband), underscoring a mobile-first product need.
* 62% of adults 18–29 say they’re online “almost constantly,” supporting in-lecture, real-time interactions on mobile.

Habits & pain points

* Large lectures correlate with worse academic outcomes (lower grades, higher dropout; reduced on-time completion). Multiple large studies in higher ed document performance declines as class size increases.
* Active-learning interventions (polling, peer instruction) raise exam scores ~6% and reduce failure/DFW rates by ~55% relative to traditional lecture, showing clear demand for tools that make lectures interactive.
* “Clicker”/audience response research finds neutral to positive effects on performance and strong gains in engagement when paired with peer or cooperative learning—i.e., the tech helps most when it changes the lecture dynamic.

**Market Size & Opportunity**

U.S.

* Undergraduates ≈ 16.0M (Fall 2024). If even 30–60% take at least one large lecture per term (conservative scenarioing given GE/intro course formats), our serviceable audience is ~4.8–9.6M students each term. *(Assumption range for planning; refine per-campus)*.

Demand signals

* Documented outcome lift from active learning (6% higher exam scores; 55% fewer failures) means administrators/instructors have measurable incentives to adopt tools that increase interaction.
* Clicker literature and best-practice guides emphasize peer instruction, accountability, and real-time feedback—exactly the behaviors our product can catalyze at lower friction on phones students already use.

Go-to-market implication

* A student-first engagement layer that works even when instructors haven’t pre-built activities can seed usage; over time, instructor dashboards and LMS tie-ins unlock departmental and campus licenses.

**Competitor Analysis**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Product | Core Fit | Pricing Model (student) | Notable Features | Gaps vs. Our Vision |
| iClicker | Higher-ed polling & attendance | $15.99/6mo, $24.99/yr, $32.99/2yr | Polls, LMS integrations, anonymous confidence | Instructor-led; no student-driven Q&A |
| Top Hat | Full engagement platform & content | $33/4mo, $53/yr, $96/4yr | Attendance, polls, content, homework | Heavier LMS focus; student Q&A not central |
| Poll Everywhere | Live polls & Q&A | Typically free for students (institution pays) | Q&A with anonymity, slideware integration | Event/instructor-initiated; limited scaffolding |

**Unique Value Proposition (UVP)**

“Give every student a safe mic—then make the noise useful.”

* Student-first, anonymous “Ask Now” queue that auto-clusters similar questions, surfaces a live confusion heatmap, and feeds concise AI summaries to the instructor’s display in seconds.
* Works even without instructor pre-work. If the prof hasn’t built polls, students can still ask/flag confusion; instructors get real-time signals and suggested prompts.
* After-class continuity. Questions and instructor responses become a searchable study thread, closing the loop for those who got lost mid-lecture.
* Equity & ethics. Anonymity and inclusive design align with ACM Code 1.4 (“Be fair and take action not to discriminate”), giving quieter or marginalized students a fair voice.

**Visualization**

A graph of a number of people

AI-generated content may be incorrect.

Data source: Pew Research Center (18–29: 98%; 30–49: 97%; 50–64: 91%; 65+: 79%).

**Evidence & Pedagogy Notes**

* Active learning > lecture alone. Meta-analysis across 225 STEM studies: +6% exam scores; 1.5× higher failure odds in pure lectures. Our product operationalizes active-learning signals (questions, confusion) without requiring full course redesign.
* Large classes harm outcomes (grades, persistence), so interventions that surface confusion early are particularly valuable in lecture halls.
* Clicker research: Effects are neutral to positive on learning, strongly positive when combined with peer/cooperative learning—supporting features like question clustering and peer-endorsed best answers.

**Risks & How We Differentiate**

* Instructor adoption risk: Many tools stall without faculty buy-in. Mitigation: student-initiated mode (no prep), plus auto-generated summaries that save instructor time during/after lecture.
* Budget sensitivity: Some competitors bill students directly. Mitigation: offer freemium student mode + department/campus tiers (institution pays), to avoid equity issues. (Poll Everywhere’s model shows institutions will fund when value is clear.)
* Privacy: Maintain anonymous by default; optional identity reveal only if a student opts in; clear FERPA-aware data policies.

**AI Usage**

GenAI tools used

* ChatGPT (this report): for synthesis, outlining, and to pull/verify facts with browsing turned on.

Representative prompts

* “Find current U.S. undergraduate enrollment totals from an authoritative source.”
* “Summarize key findings from Freeman et al. 2014 PNAS on active learning.”
* “List current student pricing and feature highlights for iClicker, Top Hat, Poll Everywhere from official pages.”
* “Pew 2024 smartphone ownership by age—give exact 18–29 % and smartphone-dependency rates.”

Fact-checking & verification

* Enrollment figures cross-checked against National Student Clearinghouse Research Center and corroborated by AAU/WaPo coverage.
* Pedagogy claims verified using the PNAS meta-analysis and reputable summaries; figures (6% / 55%) trace to Freeman et al. 2014.
* Clicker evidence sourced from the CBE—Life Sciences Education review (Caldwell 2007).
* Mobile access stats from Pew Research Center fact sheet and 2024 report.
* Competitor pricing/features taken from official product pages.

**Works Source**

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