



Foraying into the Canadian Market

The heralding of the digital era



Dhipromethi Consulting





Executive Summary



Canada is an evolving market in terms of EdTech....

- About 17,200 schools total with almost 90% being Public schools
- Total K-12 students: 5 million+
- Targetable segment: 300k
- Elementary grades contribute to over 2/3rd of the total K-12 students

Need to Focus on Primary Education with a holistic approach on learning apart from competitive exams

With many existing players, in different areas, it's important to find a niche....

- B2C and B2B2C revenue models most prominent in K12 Edtech companies in Canada
- Toppr's newly-launched "Codr" will have a significant uptake, thanks to a sizeable interest of stand-alone Coding and Robotics learning applications

Bundling products to reach the sweet spot and ensuring market equilibrium in the moderate price segment- like Thinkster, Rayku.

What should Toppr keep in its mind to ensure successful market entry?

- Enter Alberta and British Columbia as pilot entry and use the learnings to win in Ontario
- Podcasts- an exciting avenue to be tapped
- Ar/VR based, gamified offerings best suited for elementary market
- Financial Literacy oriented course modules to have a significant uptake in higher grades
- The need for strong partnerships towards ensuring smooth entry- in terms of advertising, content and R&D

Canada- EdTech Market Snapshot





Global Ed-Tech Overview

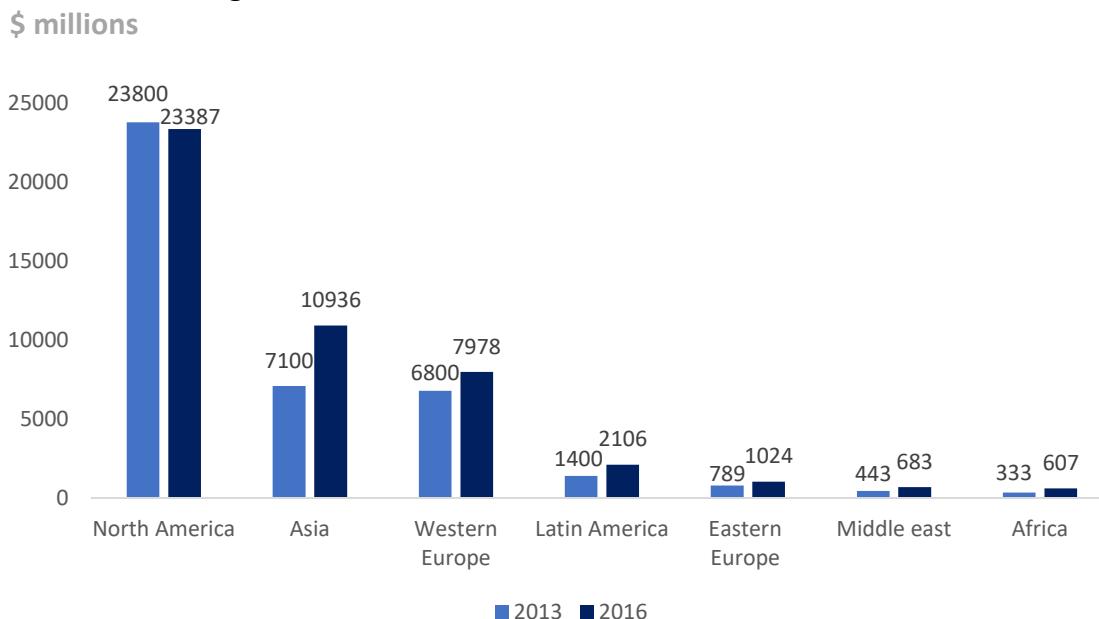


North America and Asia are major E-Learning players...

USA, Canada, China and India will play a pivotal role in the future of the global E-learning market. At present China and USA hold majority of global EdTech stocks.

Canada is 0.06% of global Ed-Tech Stocks.

Global E-Learning Market

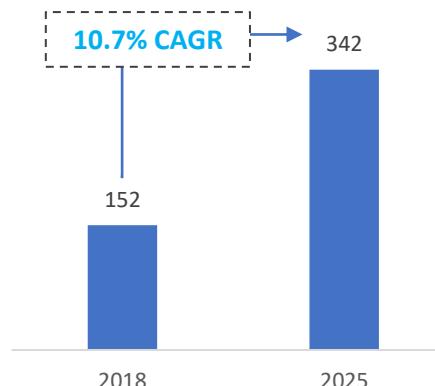


Mapping the EdTech Market by segment...

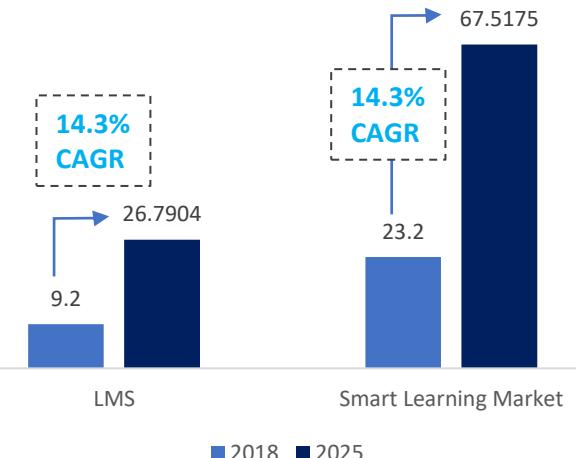
The Global EdTech Expenditure is forecasted to be in a \$350 billion ballpark by 2025 with an estimated CAGR of 12.2%

The LMS Market shows more than 2x growth by 2025 with a CAGR of 14.12%, whereas the Smart Learning market displays a CAGR of 13.4%.

Global EdTech Expenditure
\$ Billions

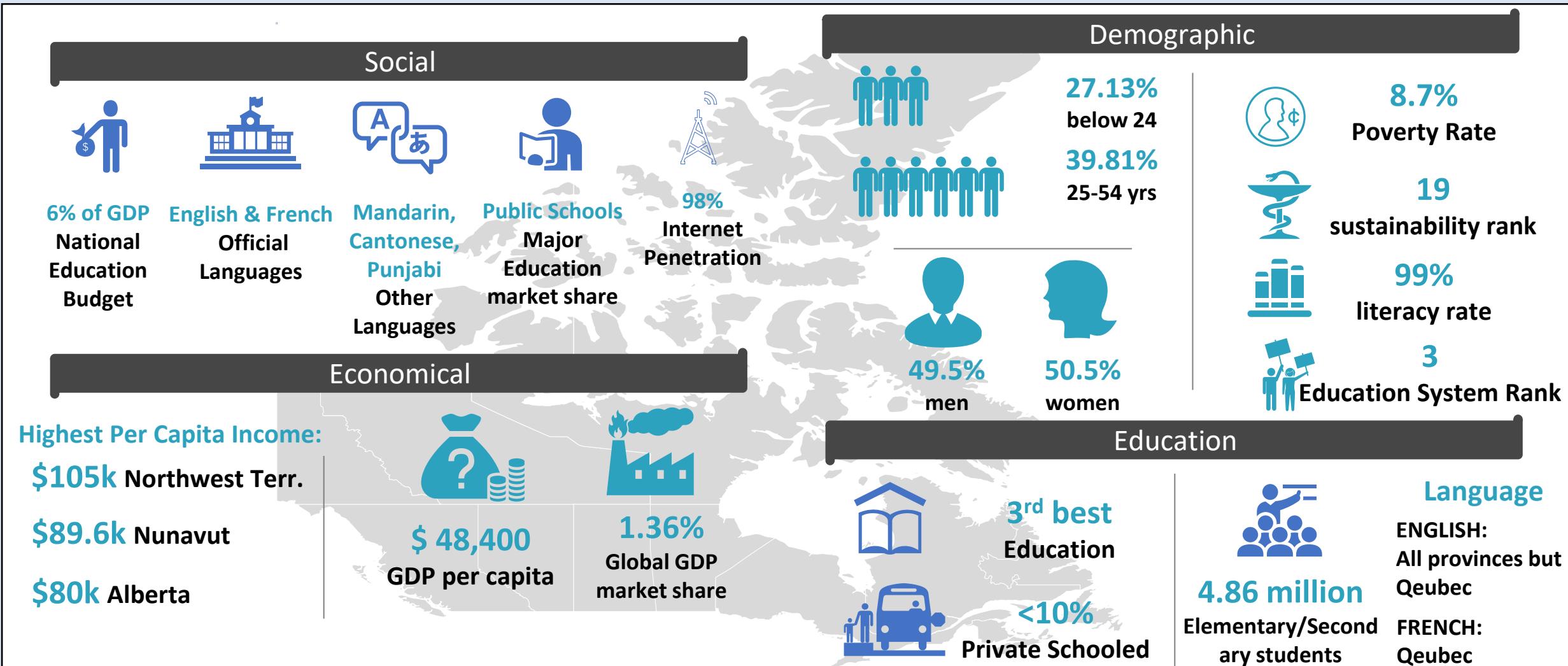


Global LMS and Smart Learning Market
\$ Billions



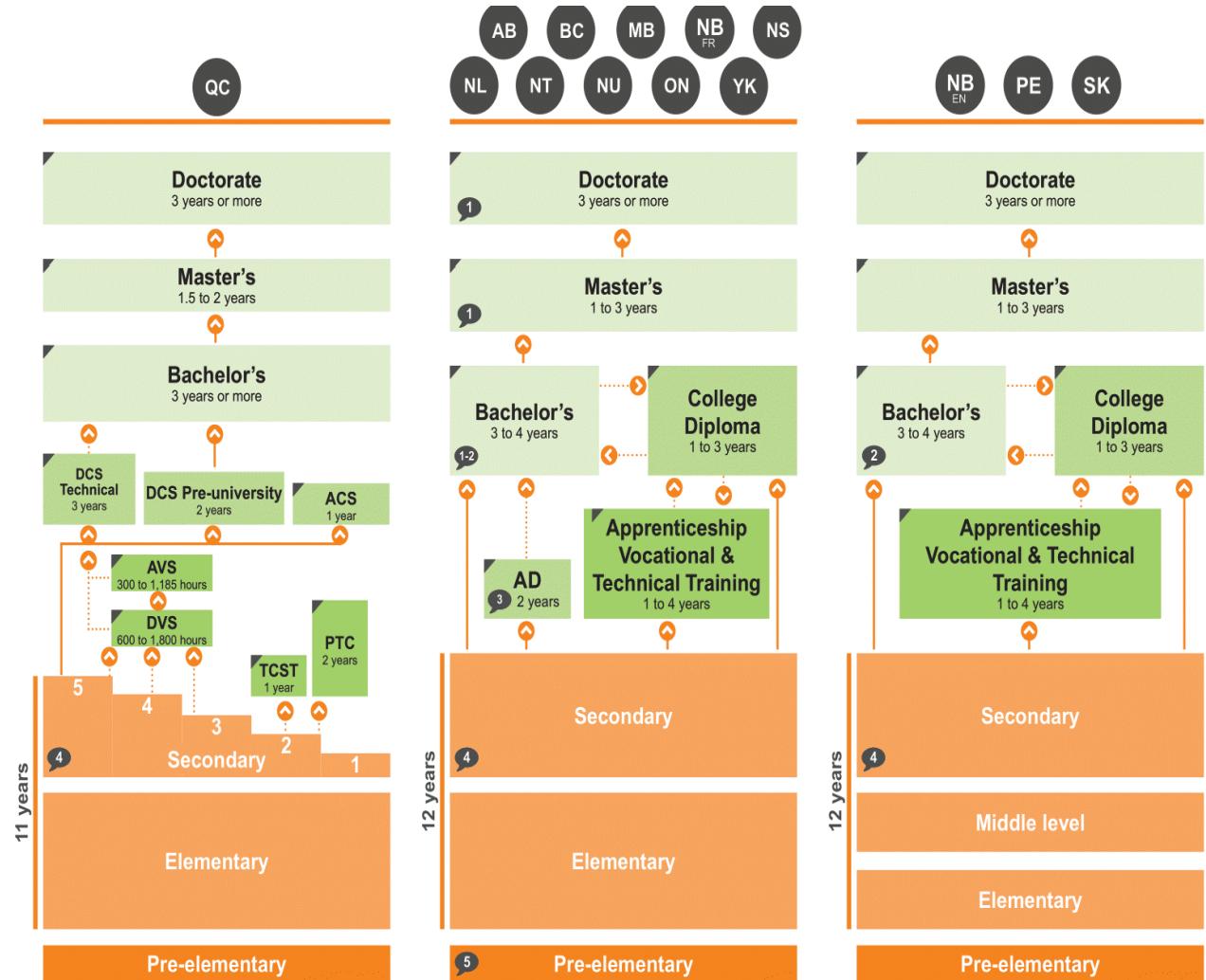


CANADA – an overview





Compulsory education from ages 5-16* with English and French as the official languages ...



Key points regarding education in Canada:

- Education primarily starts at age 5.
- Compulsory Education till ages 16-18 according to the respective province.
- Canada has a decentralized education system.
- School teaching system is female dominated.

Public Schools

- Public schools preferred.
- Assigned by area
- High school -> Credit system
- Language: English or French
- Core Subjects: Math, Science, Hist, Geo, Bible, Languages



Canada has a decentralized education, lacking any federal education department...

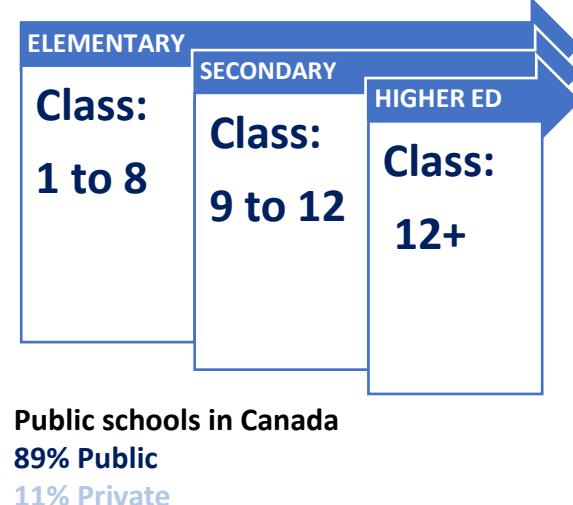
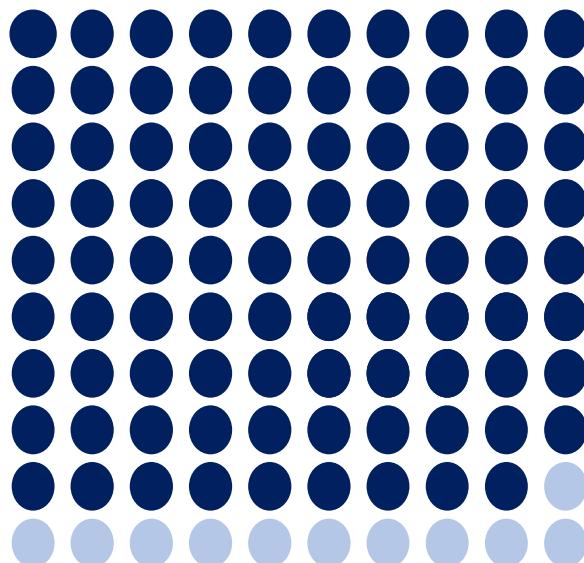


About 15,500 public schools

Canada has a decentralised education system and lacks a federal department of education. Hence, schools are a responsibility of the respective provinces and territories. Less than 1% Canadians are home schooled, with Yukon having highest percentage pf home schooled students (2.8%)

Public School and Private School split

% split



Types of schools varies with predominantly public schools....

There are public, private, catholic, charter schools that prevail in Canada. Schools are normally bi-semester, with a few uni-semester and tri-semester exceptions.

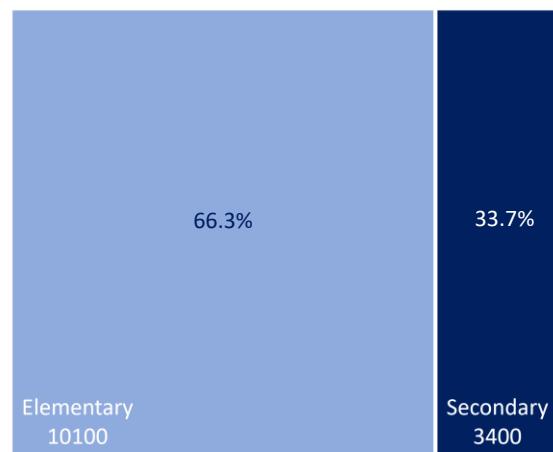
Boarding schools normally cost 40-50k CAD per year, while Catholic schools cost 10k CAD per year



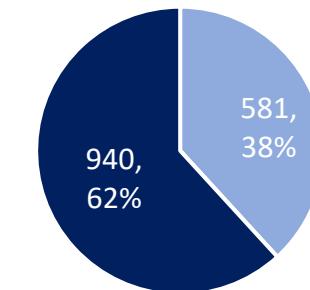
Elementary and secondary PUBLIC schools:

Breakdown

■ Elementary ■ Secondary



Public schools: Type



■ Special Emphasis ■ Religiously Oriented



English Elementary Education from grades 1 to 8 with Math and Science being the core subjects ...



Some important facets of Education system in Canada



Grade 1 to Grade 8 (in some cases till Grade 6) makes elementary education in Canada.

It's required for children to begin attending school in the first September after they turn five.



There are 3400 (almost 25%) of public elementary schools are there in Canada

A quick peek at the education system in Canada

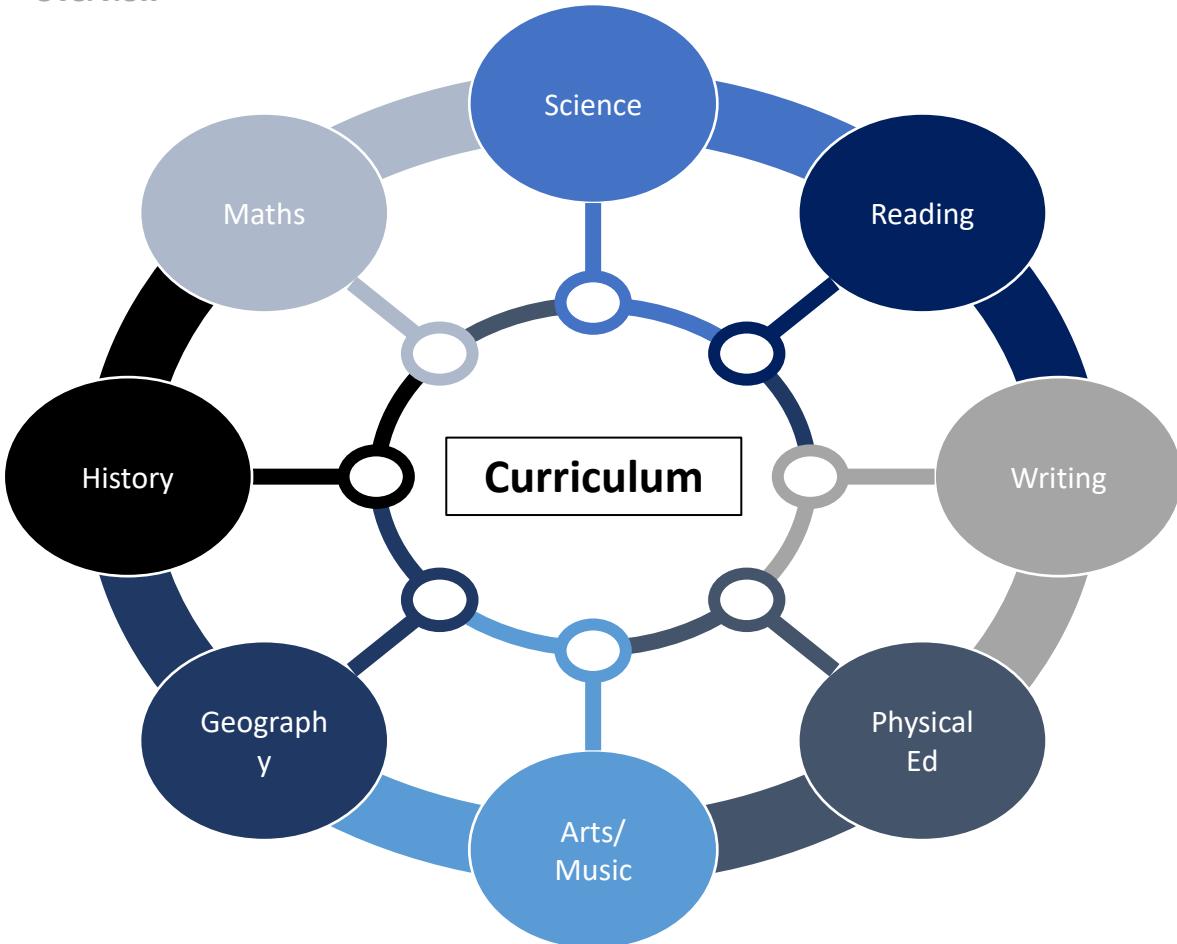
French

- French is a compulsory first or second language in most schools of Canada
- All but Quebec follow English as first language and French as second.

Passing system

- Promotion from grade to grade within elementary schools is usually performance based, meaning students must pass yearly exams to advance.

Public school Curriculum: Overview





Secondary Education has vocational, university and normal education with the option of electives ...

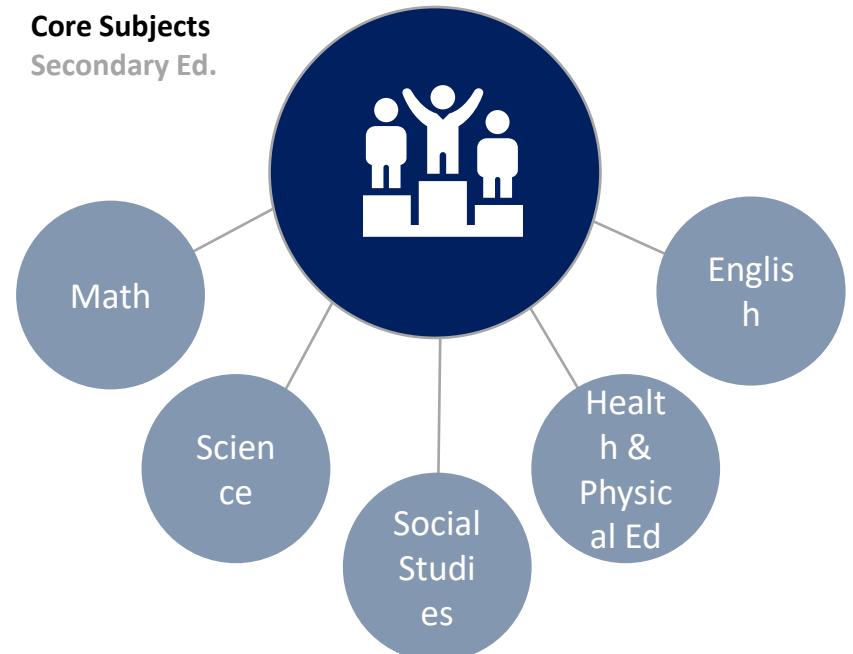


Grade 9 (in some cases it is from Grade 7) to Grade 12 make secondary education in Canada..

There are 10100 (almost 75%) of public elementary schools are there in Canada



Core Subjects
Secondary Ed.



Vocational

- It focuses more on career-oriented subjects like agriculture, farm management, business operations, home economics, child care, industrial education.

Secondary

Streams

Vocational

University

Normal

QUEBEC

- In Quebec, students attend high school from grade 7 to 11
- They then move to a general/vocational college for 2 years

ELECTIVES

- Starting in secondary school, students are allowed take **electives**.
- This helps understanding their interests and aspirations



Post-Secondary Education is broadly divided into Universities, Dual degree, Colleges and other systems ...



Universities

-Acceptance to a Canadian university often requires completion of a high school diploma (or equivalent, GED test, age and life experience, admissions testing, or other criteria). Academic Career choices where an undergraduate degree is required

Dual degree

-York University, University of Alberta, Brock University and Cape Breton University, offer dual to students upon completion of their graduation requirements.

Colleges

-Not recognized in customs regime.
-No regulatory framework for Licensing, etc.

Other systems

-To enter traditional trades (called "skilled trades" in Canada), and some provinces have unique preparatory systems or schools, such as Quebec's pre-university college level.



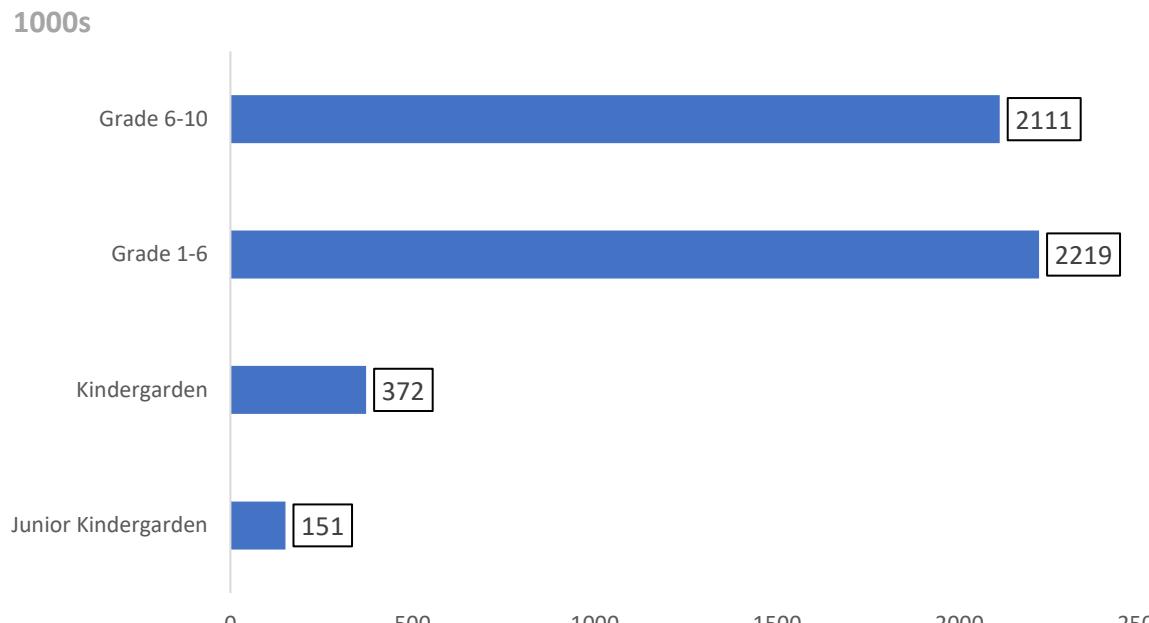
English dominated education system with an equal gender-ratio (except Quebec -> French)



Compulsory education till the age of 16-18....

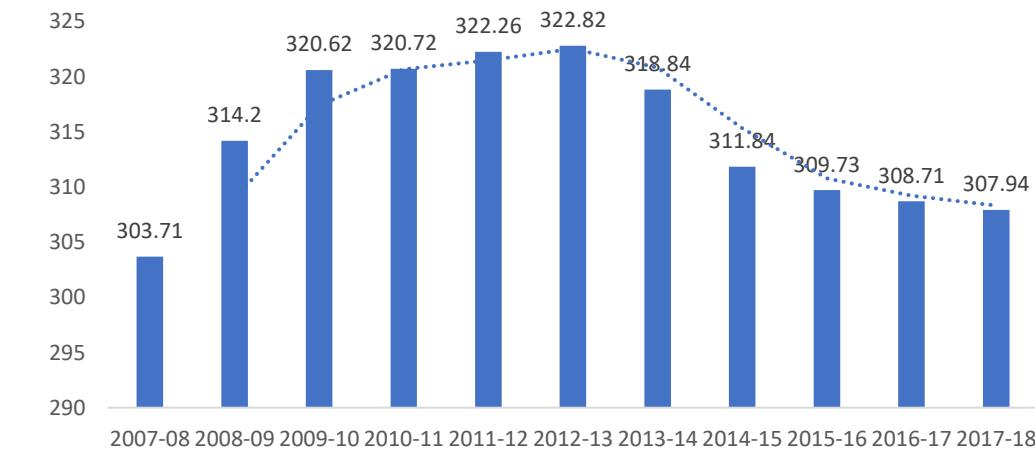
Junior Kindergarten shows lower numbers as age for compulsory education starts from 5 yrs. Grades 1-6 have the major number of students because of the compulsory education rule.

Public school students in Canada



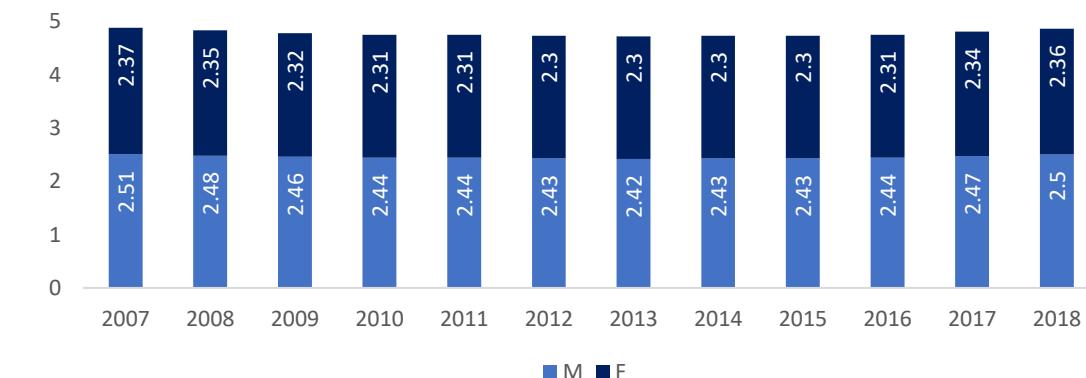
Public school graduations:

Thousands



Public school gender wise:

Millions





Management, Business are the major preferences of students with majority of them being 18-25 years old ...

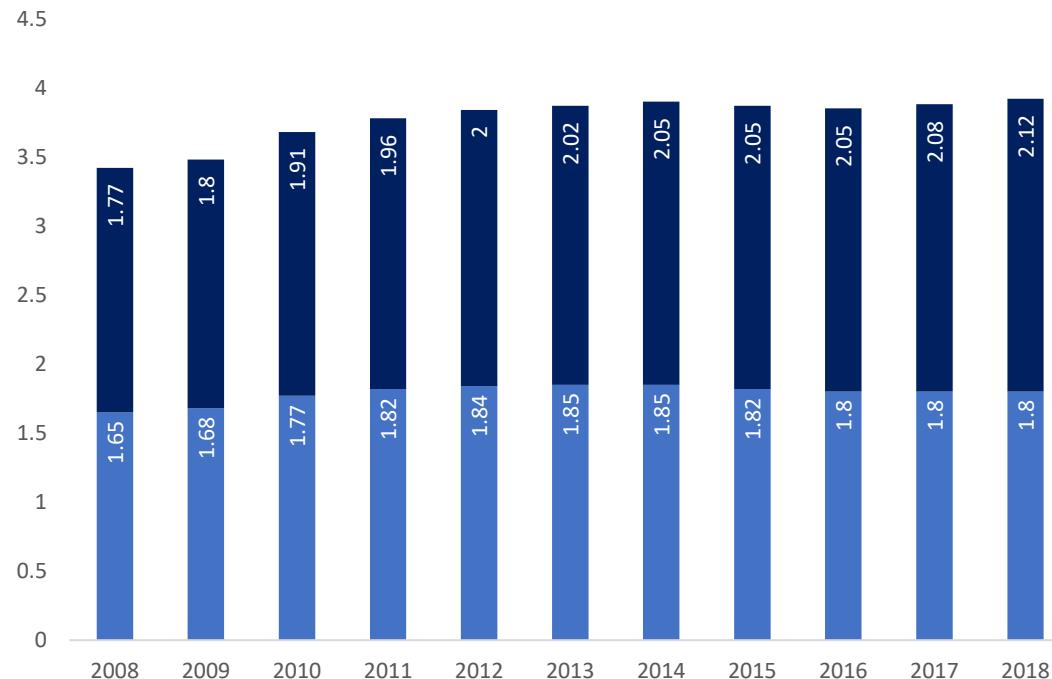


Post-Secondary Education....

Management, Business, Engineering, Architecture are most sought after degrees, with majority Canadian students within the ages of 18-25

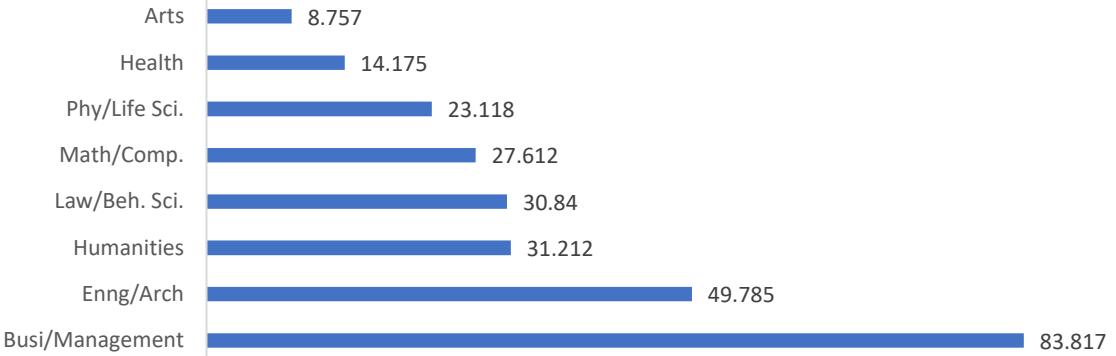
Post secondary enrollments:

Total students v/s Canadian students



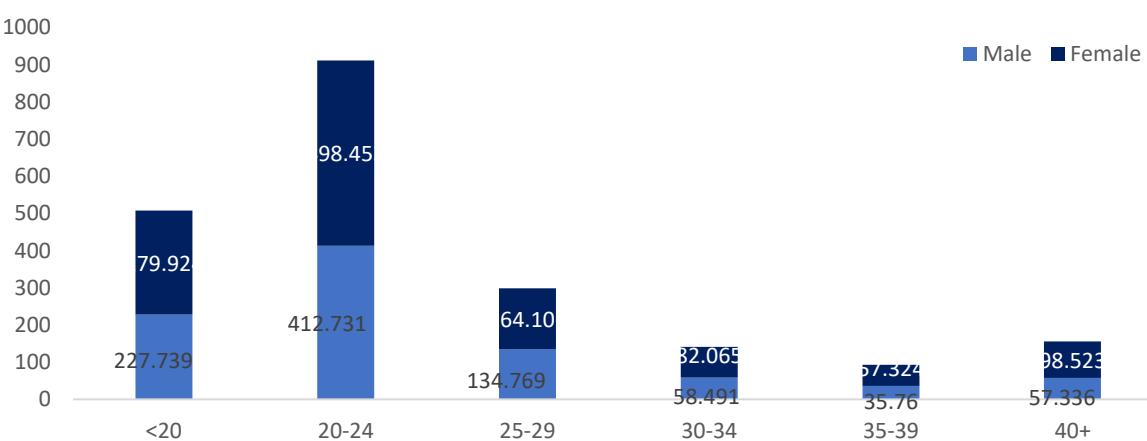
Canadian Post-Secondary enrolments by degree:

1000s



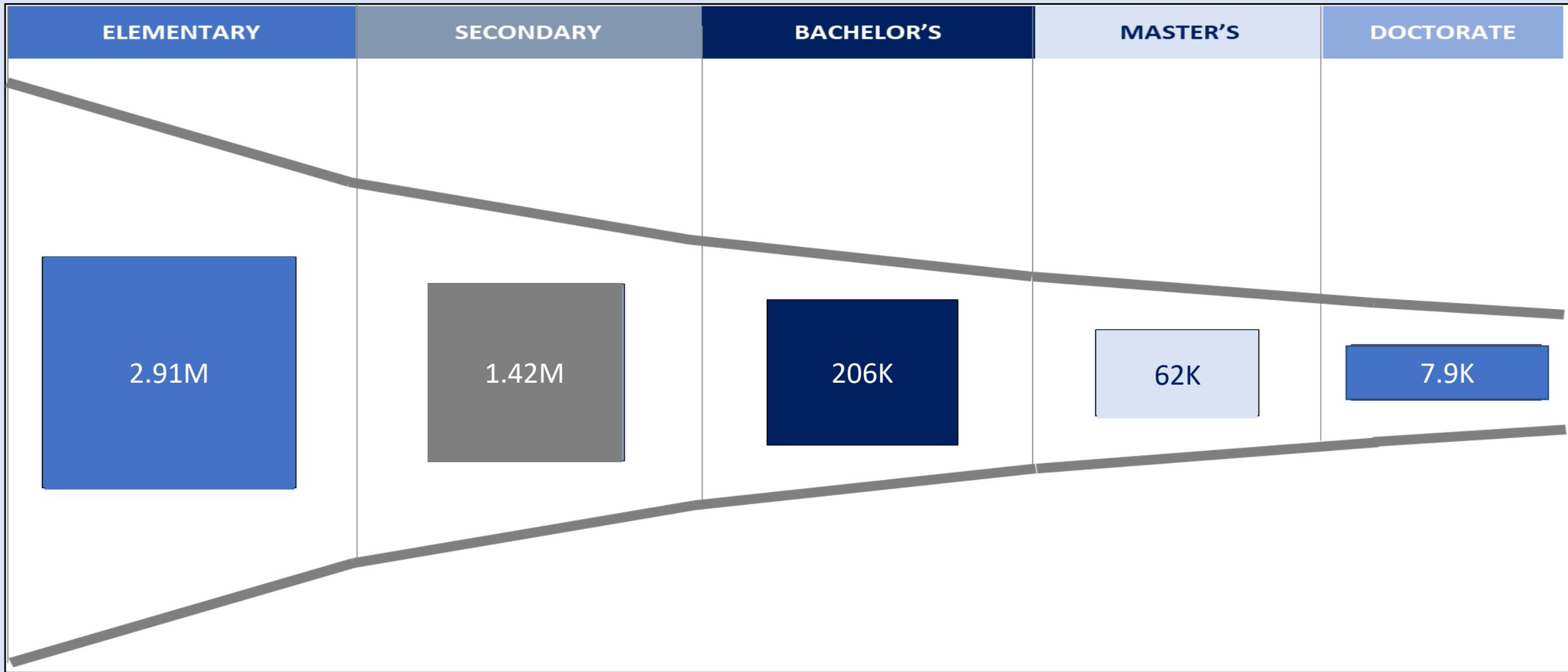
Post secondary by age and gender:

1000s





Down the life of a Canadian student ...





Provincially, Ontario is far ahead of its peers when it comes to sheer numbers...

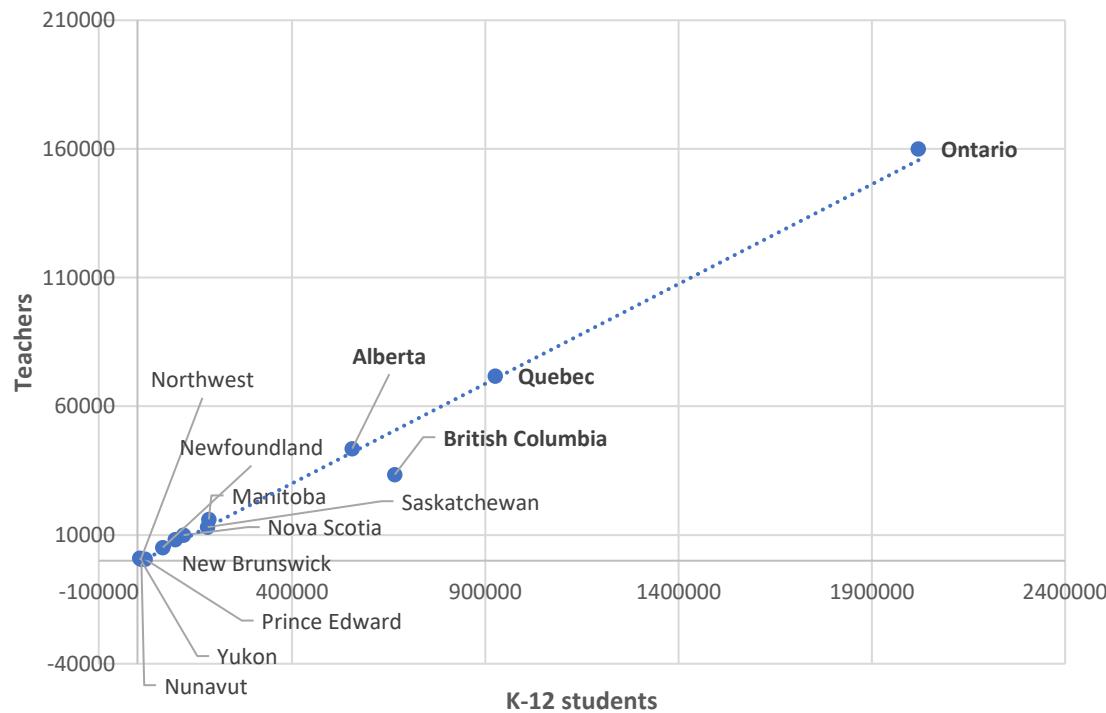


With over 2 million students Ontario leads the charge....

With almost 2x the market size compared to Quebec, which is the second biggest market, Ontario is definitely the place to be in, in Canada

K-12 Students vs. Teachers

Nos.



Provincial Understanding of Marketsize and E-learning adoption Nos.

State	K-12 students	e-Learning	%
NL	64,336	1,140	1.77%
NS	120,604	2,381	1.97%
PE	20,131	100	0.50%
NB	98,906	3270	3.31%
QC	1,003,322	40000	3.99%
ON	2,020,245	89000	4.41%
MB	208,796	11875	5.69%
SK	184,004	8,378	4.55%
AB	718,310	75,806	10.55%
BC	633,805	65000	10.26%
YT	5,456	170	3.12%
NT	8,700	130	1.49%
NU	10,107	70	0.69%
Federal	107000	2000	1.87%
Total	5,056,819	299,320	5.92%



Laying focus on what's important leads to better utilization of resources ...

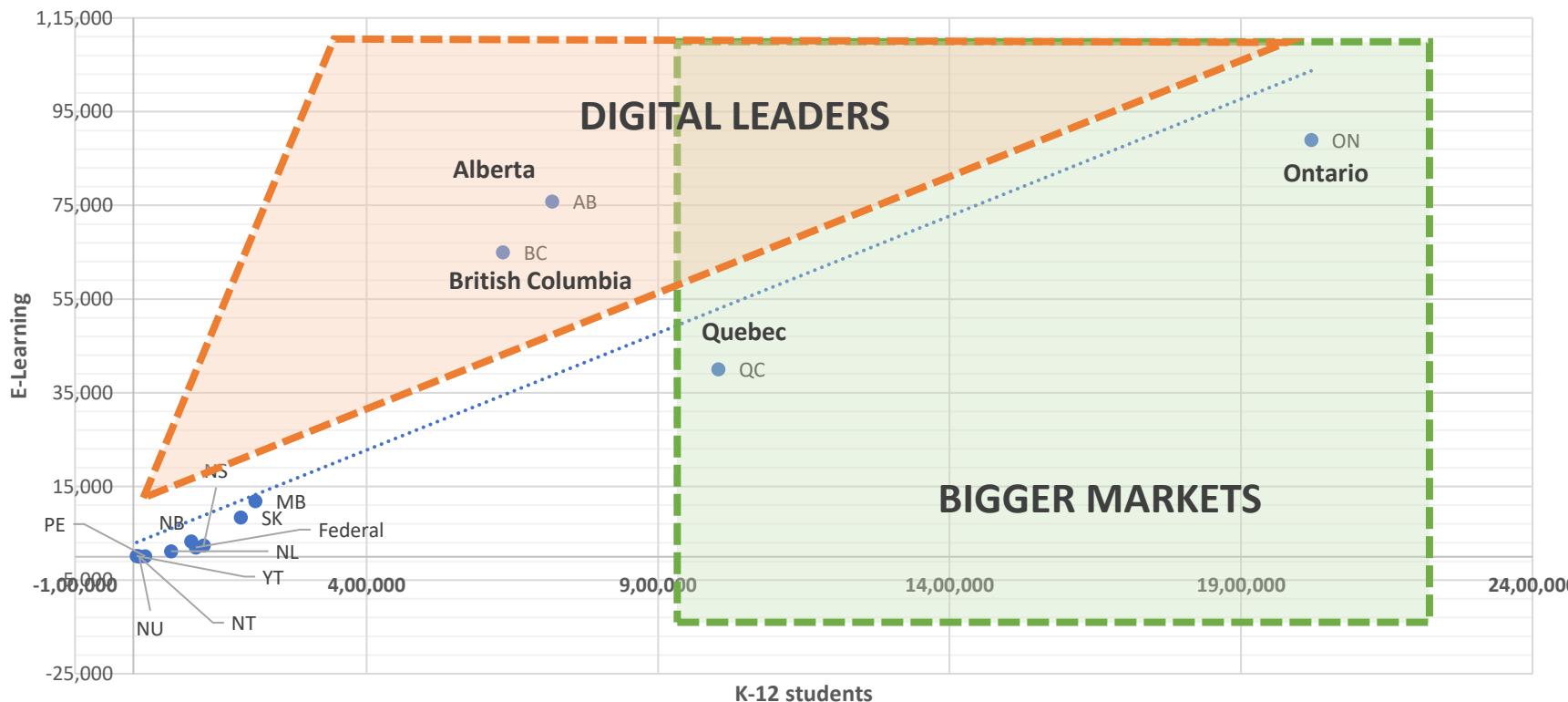


Focus to be laid on Alberta, British Columbia, Ontario and Quebec....

Alberta and British Columbia are digital leaders with a better online learning penetration rates, whereas Ontario has the biggest market by sheer numbers

Students enlisted in K-12 and those who take up E-learning facilities

Nos.



Focusing on four provinces should roughly cover 90% of the Canadian market....

With Ontario corresponding to 40% of the total K-12 students in Canada, it's going to be a make it or break it situation for Toppr

Enter Alberta and British Columbia first, use the learnings for Ontario- the Final Frontier



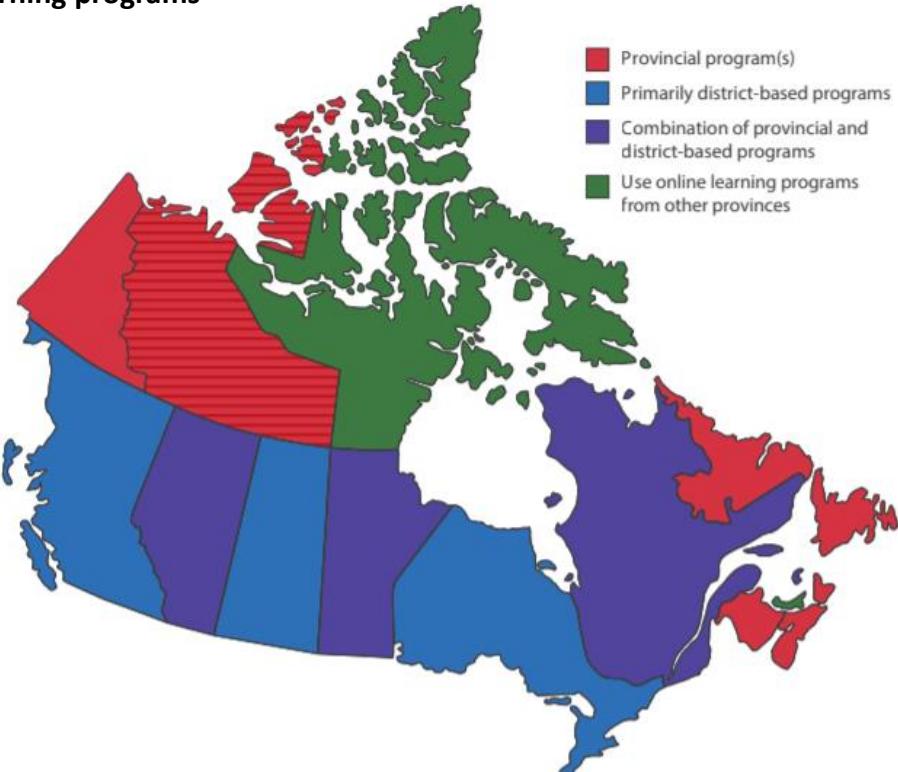
Understanding the regulatory aspects in different provinces towards full-time online/distance education ...



Districts seem to have the bigger say....

In most of the populated provinces, there seems to be a set of guidelines from both districts and provinces for the programs

Provincial Distribution of program classification of full-time online/distance learning programs



Legislative trends in provinces....

Students from all thirteen provinces and territories continue to participate in K-12 distance and online learning opportunities. Most jurisdictions continue to have either **primarily district-based programs or district-based programs and provincial programs**. The exception to this trend is in Atlantic Canada and Northern Canada.

In Atlantic Canada, the dominant model is the use of a single province-wide program. The greatest change has actually occurred in the Canadian territories where the **Yukon** has developed its own online learning program and the Northwest Territories is in the second of a three year expansion of a district-based online pilot.

However, all three territories still utilized distance and/or online learning programs from southern provinces. In terms of level of distance and online learning activity across Canada, the total K-12 population in Canada for 2018-19 was approximately five million students.

Based on actual and estimated enrolment data, the number of students engaged in K-12 distance and online learning was 299,320 or 5.9% of the overall K-12 student population. It is important to note that the ~ symbol below means that approximations were provided by one or more sources during the data collection.



Four States: A quick overview



QUEBEC



Population	8,263,600
K-12 Schools	3102
K-12 Students	1,003,322
K-12 E-Learning Programs	5+
K-12 E-Learning Students	~50,000+

- ✓ There have been no regulatory changes in the province of Quebec.
- ✓ However, a 2017 amendment to the Loi sur l'instruction publique that allowed the Minister of Education to authorize pilot projects did see a number of projects approved to operate under the regulations outline in this amendment during the 2018-19 school year.
- ✓ During the same school year there were approximately 32,000 students enrolled in distance and/or online learning courses. It is believed that there were at least approximately 20,000 students enrolled in formal blended learning opportunities.

ONTARIO



Population	13,538,000
K-12 Schools	4850
K-12 Students	2,020,245
K-12 E-Learning Programs	80+
K-12 E-Learning Students	7,95,000

- ✓ There have been no regulatory changes in the province of Ontario. Although, in March 2019 the Govt. did announce plans to centralize the delivery of all e-learning courses, to expand broadband Internet access for all schools by the 2021-22 school year.
- ✓ Based on figures provided by the Ministry of Education, there were approximately 57,000 students engaged in online courses offered by one of the public district school board eLearning programs during the 2017-18 school year.
- ✓ There were approximately 765,000 unique student logins in the provincial learning management system from classroom-based or online students.



Four States: A quick overview



BRITISH COLUMBIA



Population	5,020,302
K-12 Schools	1933
K-12 Students	633,805
K-12 E-Learning Programs	74
K-12 E-Learning Students	65,000

✓ In February 2018 an Independent Review Panel examined how K-12 education was funded. It focused on online learning and was tasked with assisting the Ministry of Education in determining the best approach to implementing the recommendation that reads: “with the shift to a per-student-based funding model, the Ministry should develop a new policy”

✓ In 2018-19 there were 57 district-level public distributed learning schools and 16 independent distributed learning schools that enrolled approximately 65,000 unique students in one or more courses.

ALBERTA



Population	4,371,316
K-12 Schools	2,266
K-12 Students	718,310
K-12 E-Learning Programs	33
K-12 E-Learning Students	75,806

✓ There have been minor regulatory changes in the province of Alberta with respect to distance/online learning. However, Alberta Education changed the terminology for a program that consists of two parts

✓ (i.e., where the school-authority is responsible for the student’s education program, and where the parent is responsible for their child’s education program) from blended program to “shared responsibility” program to become more aligned with the current e-learning vernacular.

✓ During the 2018-19 school year there were a total of 75,806 students coded as being enrolled in online learning/distance education programs.



Inflow of Intl' students and high percent of immigrants are key drivers of Language Learning & EdTech ...

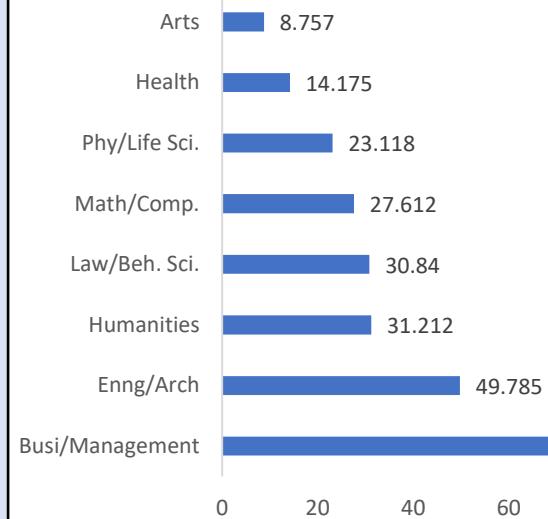


An inflow of International Students....

Canada (behind US & Aus) is third in terms of number of Intl' students with about 642000 Intl' students, 56% of which come from India and China. 17000 jobs generating to about \$22 billion belong to these students. Strong quality of education and a multicultural but tolerant society are key drivers. 60% students considered permanent residency. Ontario(48%) and BC (23%) enjoy a major share in Intl' Enrolment.

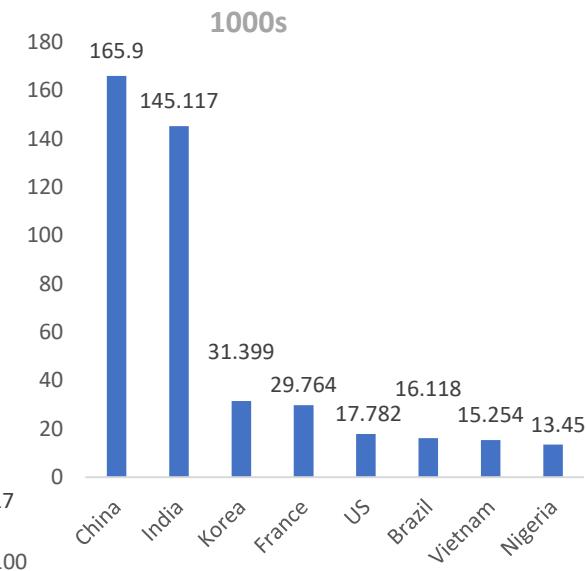
Post-Secondary program enrollment (17-18):

1000s



International students:

1000s



Huge level of immigration....

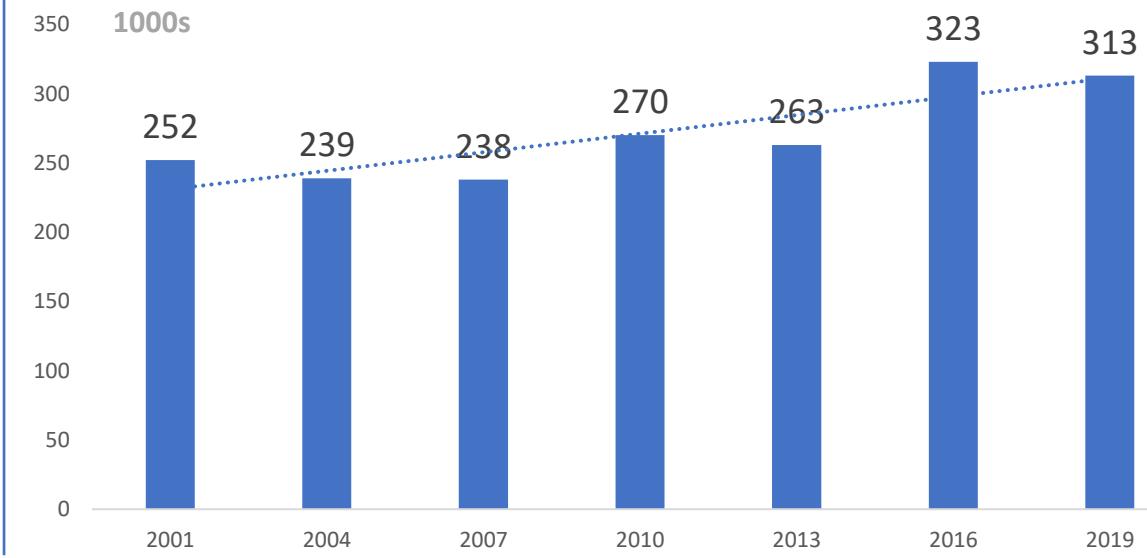
22.9% of Canadian population is immigrants. In 2020, India, China, Philippines, France constitutes majority of the immigrants. About 80% of Canada's (slow) population growth is due to immigration.



Immigrants tend to struggle with Language learning, a key segment of the Ed-Tech industry

Number of new immigrants in Canada

1000s





The importance of Financial Literacy and the 5G revolution are key drivers for EdTech in Canada ...



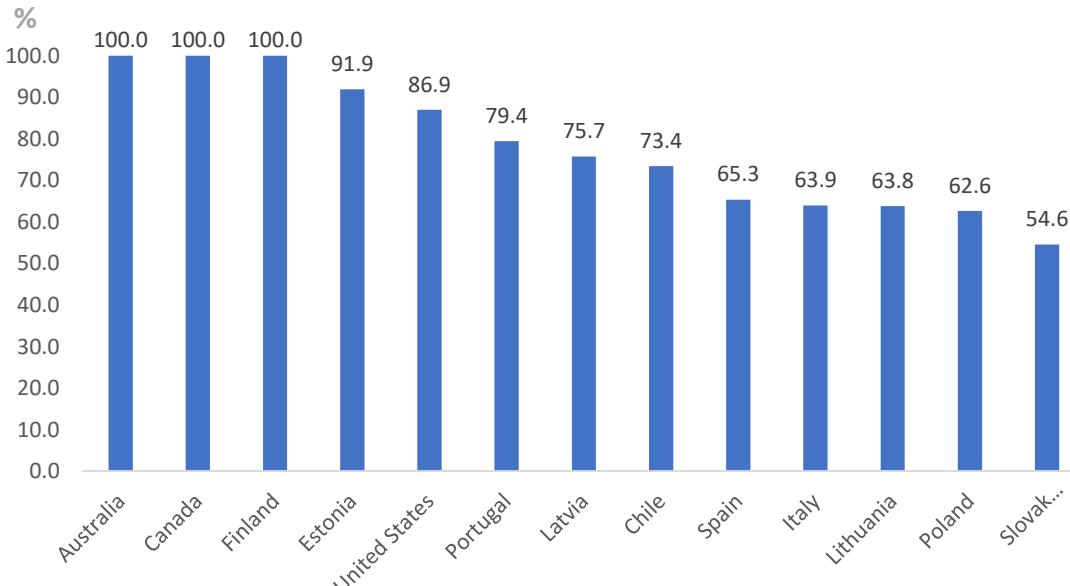
Financial Literacy is important in Canada....

Majority of the people between ages 15-24 have a bank account, with a relatively small variation in urban and rural areas. 67% students have a bank account and/or a debit card.



95.9% students obtain financial information from their parents, leaving a great gap for us to enter.

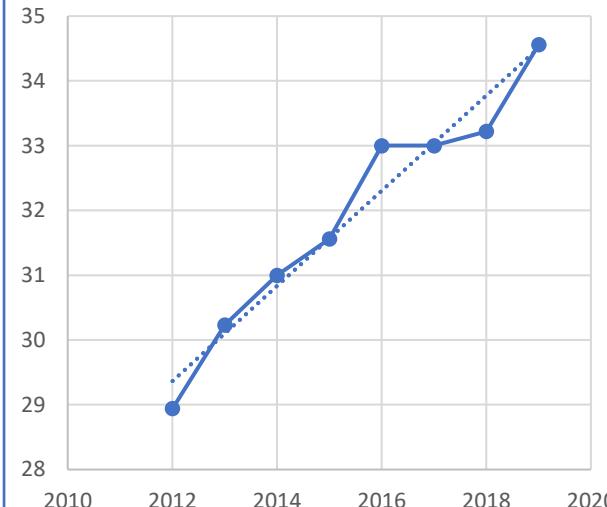
People of age 15-24 having bank accounts



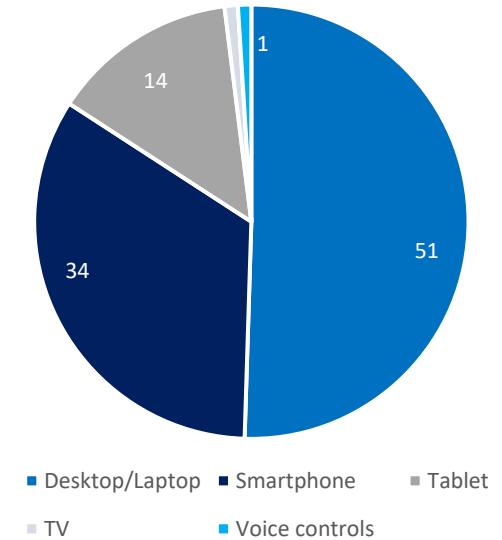
The Internet and 5G Revolution....

71% students feel positive about the integration of Technology in Education, though the presence of a teacher still is pivotal according to them. 79% teachers agree that use of Technology helps students learn. Familiarity with E-wallets and E-payments has increased from 23% in 2016 to 32% in 2019.

Internet Users: millions



Mode of internet usage: Percent of people





64% couples with children between ages 6-17 are working and would turn to private & online tutoring ...



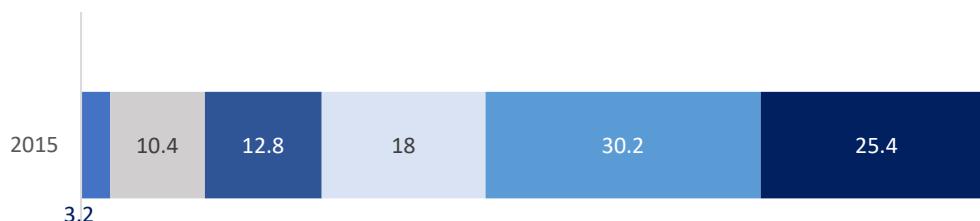
Working parents can't give time for child's study....

74% of couples who had a child under 6 were both working couples.

82% couples with children 6-17 yrs are working.

Working couples with children under 6 yrs

Percentage



0 earner

1 earner , part time

1 earner, Full time

2 earner, Part time

1 Part time, 1 Full time

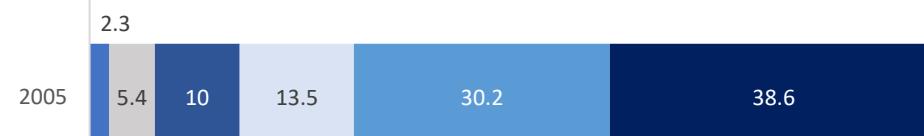
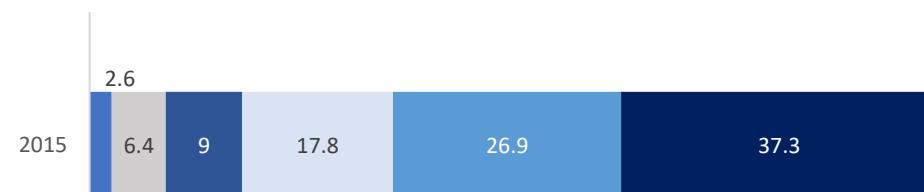
2 Full time earners

Most parents working....

More and more 2 income earner homes are prevalent in Canada. This coupled with increase in disposable income acts as an incentive for growth of Online and Private Tutoring.

Working couples with children between 6-17 years

Percentage



0 earner

1 earner , part time

1 earner, Full time

2 earner, Part time

1 Part time, 1 Full time

2 Full time earners



Single parents and Immigrant parents would be most susceptible to hire private tutors or online education ...



About 80% single mothers with a child between 6-17 yrs reported work activity, the same goes for 88% of single fathers.

Work activity of Canadian Couples with children under the age of 18:

Percentage

40

35

30

25

20

15

10

5

0

11.5

21.1

11.8

5.6

13.2

12.7

9.3

25.9

21.5

16.1

17.1

22.5

31.6

11.7

27.2

35.7

Recent immigrant couples

Other immigrant couples

Canadian-born couples

Work activity and immigrations....

12% recent immigrant couples have no bread-winner.

Median Income:

- The median income of Both working parents is 122.7 CAD, which is high enough to afford external help for child's education

Dual earner couples with a child under 16 yrs of age:

Percentage

2,500

2,000

1,500

1,000

500

0

1976 1978 1980 1982 1984 1986 1988 1990 1992 1994 1996 1998 2000 2002 2004 2006 2008 2010 2012 2014



1 in 5 children of the major urban cities in Canada live in low-income households ...



Children living in low income households....

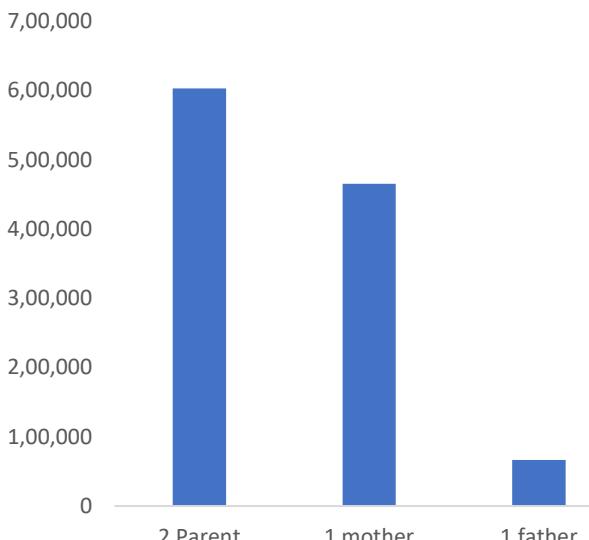
1 in 5 children of major urban centres live in low income households, many of them situated in Ontario and New Brunswick. Alberta has the lowest number.



24% of children in Windsor, Ontario live in low-income households.

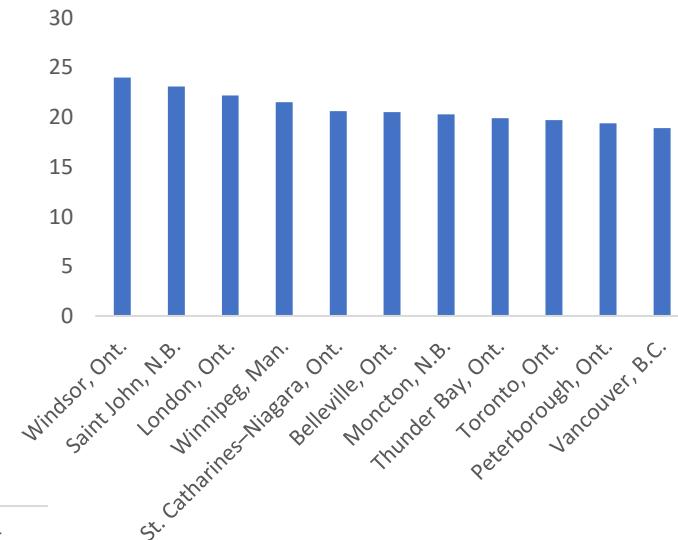
Children under 18 living in low-income households

Number



Low income households: major cities

Percentage



Surge of private tutors in Canada....

60% of students in Toronto have private tutors supplementing their school. Even though Canada lacks high-stakes exams, tuition centres like Kumon have been flourishing.



Growth of private tutoring has been seen mainly in Ontario and British Columbia

Given no financial obstacle:

Responses

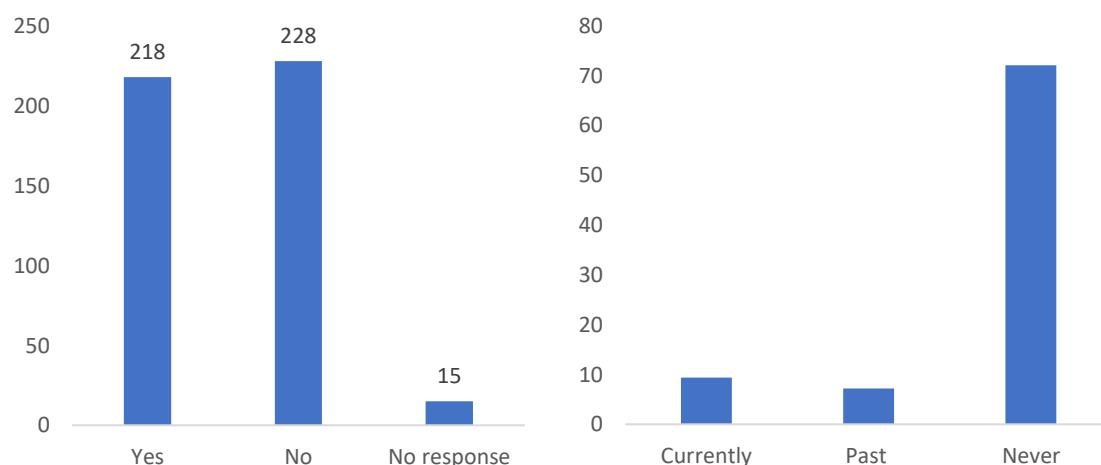
218

228

15

Private tuitions :

Percentage



Canada- EdTech Players Snapshot



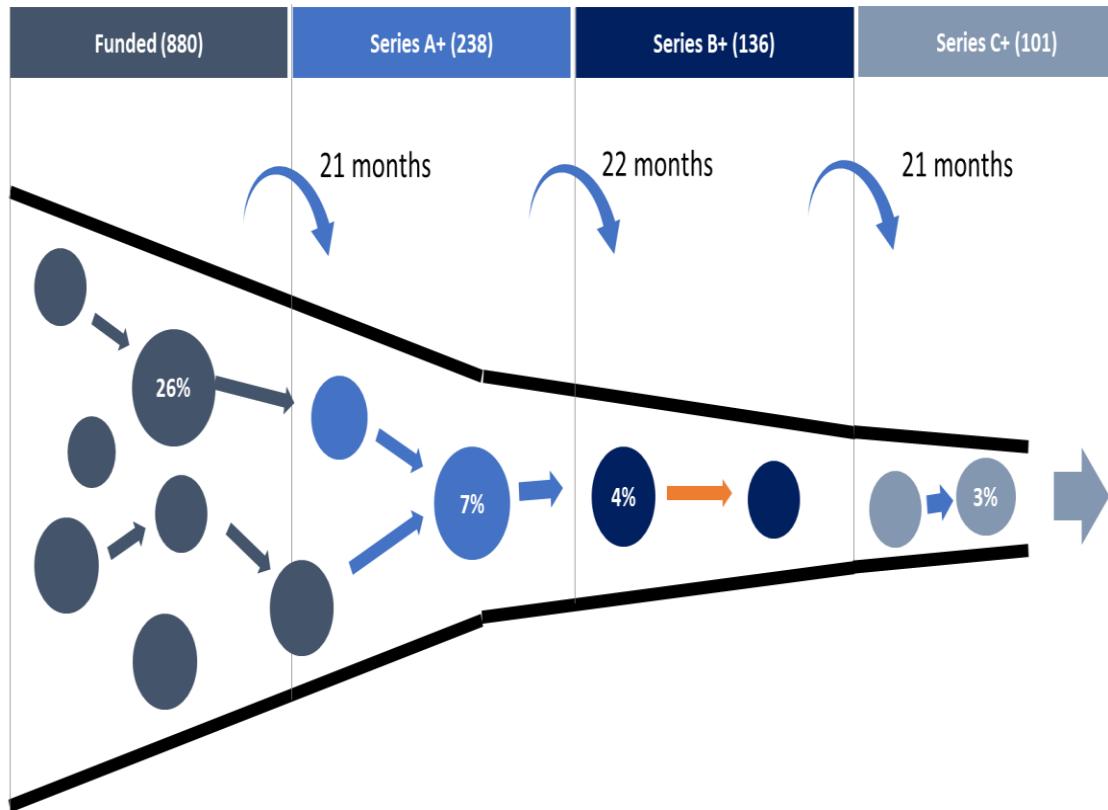


The SaaS industry in Canada has been ever-growing with major funding in Toronto, Montreal and Vancouver ...



Funding Funnel: SaaS Canada....

Out of 3345 founded companies in SaaS area, about 3% reach Series C+ Funding. 105 companies have a 100 million or greater valuation. 2 unicorns exist.



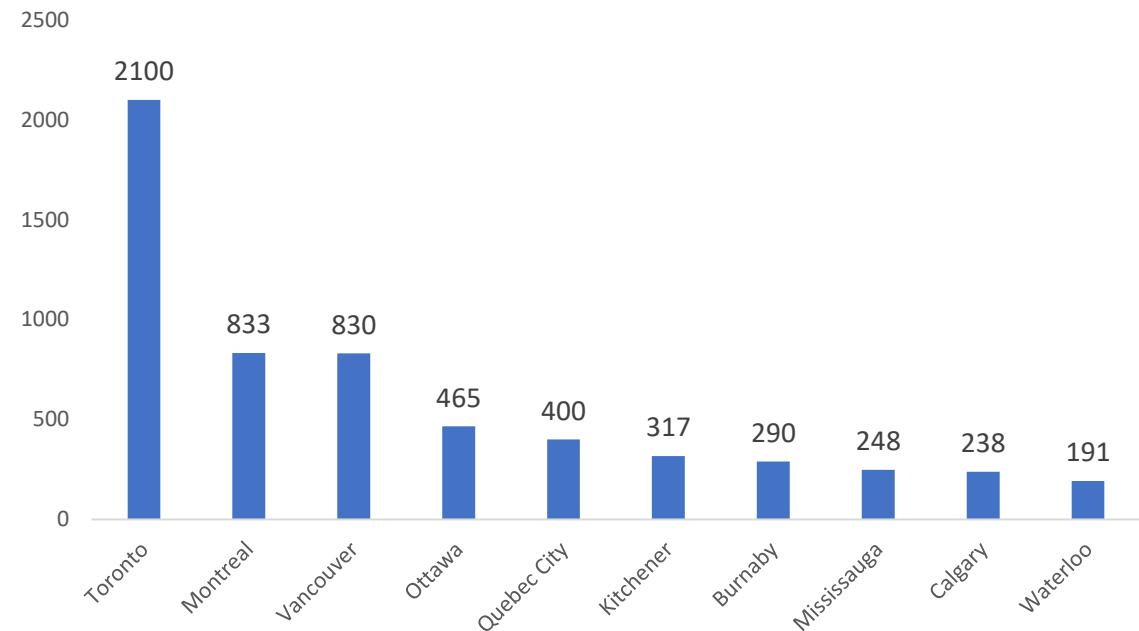
Funding by regions....

Funding has been maximum in the mega-cities of Canada, namely Toronto, Montreal, Vancouver and Ottawa.

Notable investments were for Element AI (Montreal, \$257M), Intelex (Toronto, Unicorn), Prontoforms (Ottawa, Unicorn), etc.

Funding by Geography:

\$ millions





Top Hat, Coveo are some notable SaaS companies in Ed-Tech in Canada ...



	Amount	City	Type	Date
Coveo	\$175M	Quebec City	Series F	Nov 2019
Top Hat	\$20M	Toronto	Series D	Feb 2020
Axonify	\$771k	Waterloo	Series C	Oct 2018
ProcedureFlow	\$2.9M	Saint John	Series A	Sep 2019



Operational Segments of the Ed-Tech Industry



Pre & Post K-12:

- Pre-school and grades 1-12 respectively

Higher Ed:

- Post K-12

Test-Prep:

- Focus towards excelling in Olympiads, tests, etc.

Continued and Language:

- MOOCs and courses for one and all

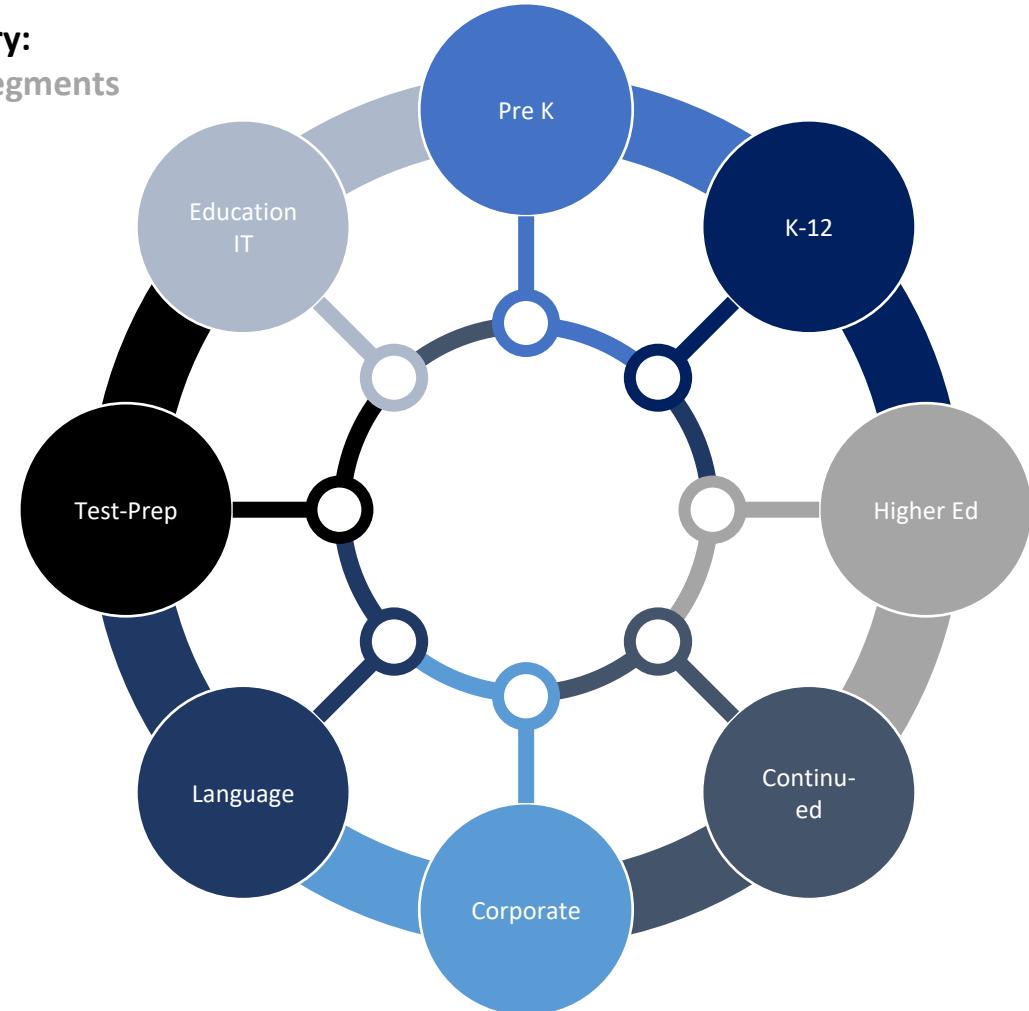
Corporate:

- Courses provided by companies

Education IT:

- Platforms for interactive learning, LMS, etc.

**EdTech Industry:
Operational Segments**





Taxonomy of K-12 Ed-Tech Companies ...



Type	Cos. Tracked	Cos. Funded	Notable Companies
New Age schools: <ul style="list-style-type: none">Schools using tech to improve learning outcome	53	14	Cyber School, RVS
B2C Learning Solutions <ul style="list-style-type: none">Providing online courses, tutoring, educational resources, etc.	2976	764	PrepToon, Powerful Tuition
B2B2C Learning Solutions <ul style="list-style-type: none">Learning solutions like activity based learning and online courses focusing teachers, schools, companies	1014	435	Gluten Education, Troxell
Tech for teachers <ul style="list-style-type: none">ERP Solutions, management systems, teaching tools, etc.	1073	377	LMA, LiveBoard
After School Activities <ul style="list-style-type: none">Non-curriculum based learning.	9	4	Enrolmy, AZA School
K-12 E-Commerce <ul style="list-style-type: none">Tutor discovery, school discovery, school supplies, educational toys and courses, etc.	81	19	BookShip, brptrade.top



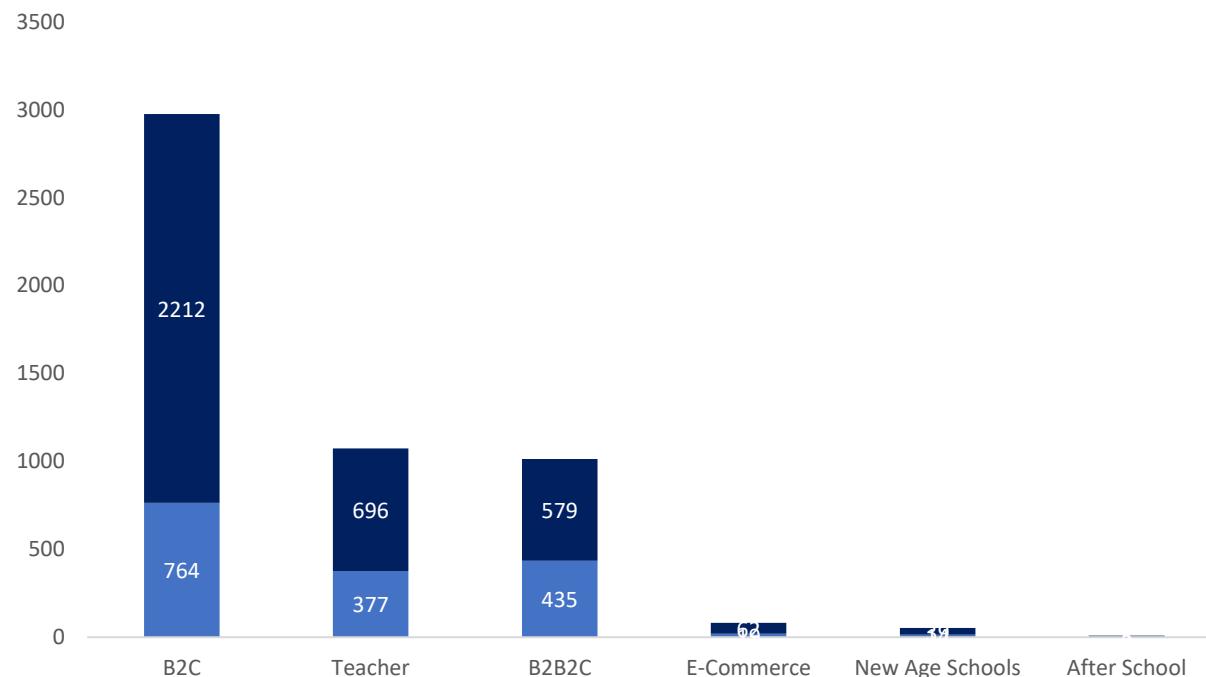
B2C, Teacher Tech and B2B2C EdTech companies prevail ...



B2C and B2B2C occupy the highest share....

2976 companies in the K-12 EdTech scene are B2C companies, half of that are Teacher Tech and B2B2C companies.

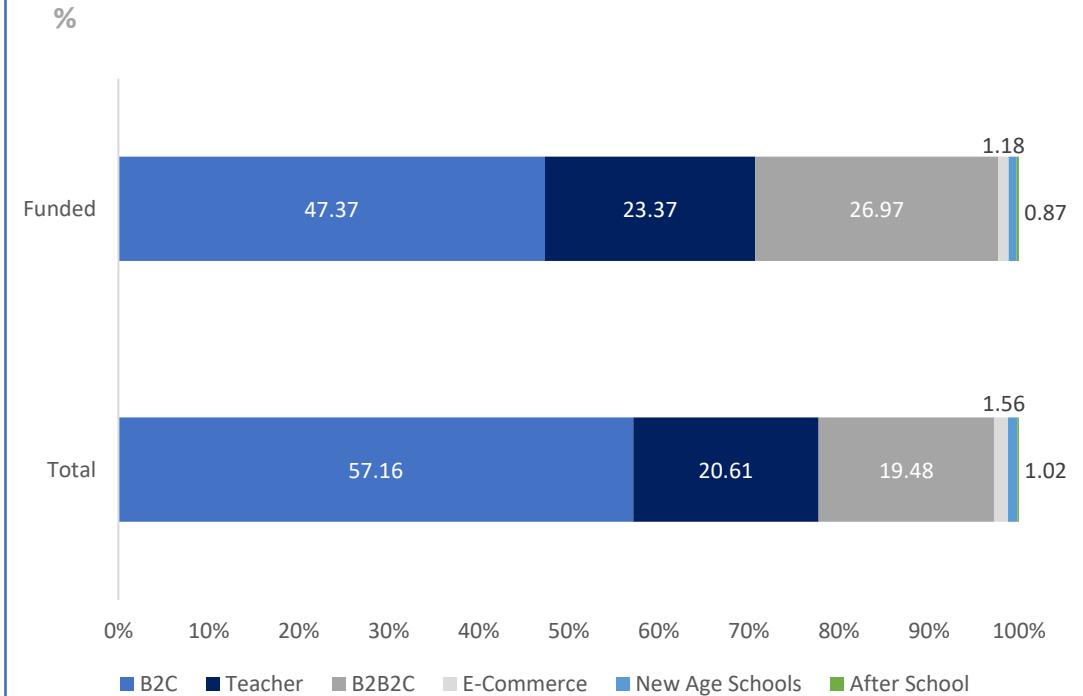
Taxonomy Split by number of companies tracked and funded :



B2B2C companies have highest percentage of funded companies....

42.9% of B2B2C companies are well funded, some of them receiving funding in the past 24 months.

Taxonomy Split by Percentage





B2C v/s B2B2C K-12 Ed-Tech in Canada

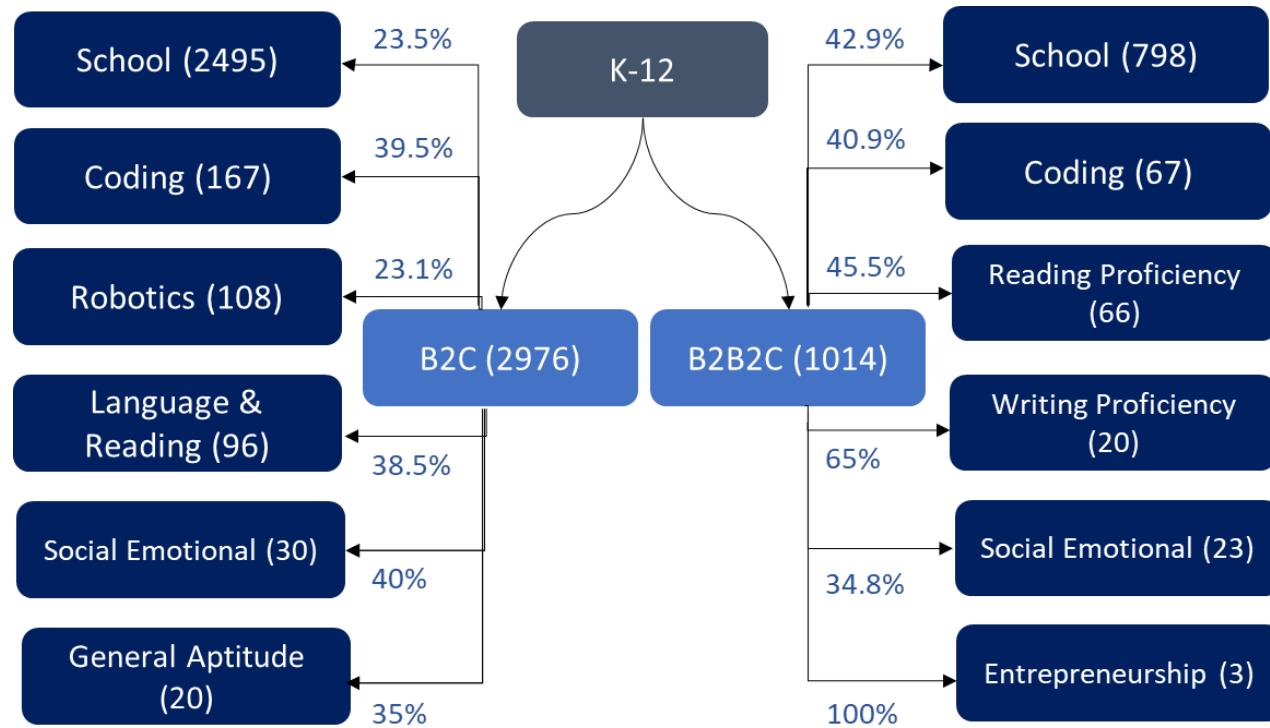


Major B2C & B2B2C companies in Canada and percentage funded....

School Curriculum dominates the K-12 B2C & B2B2C companies while coding and robotics follow. Reading, writing and language have a considerable number of companies. Indicating that this is surely an avenue to explore.

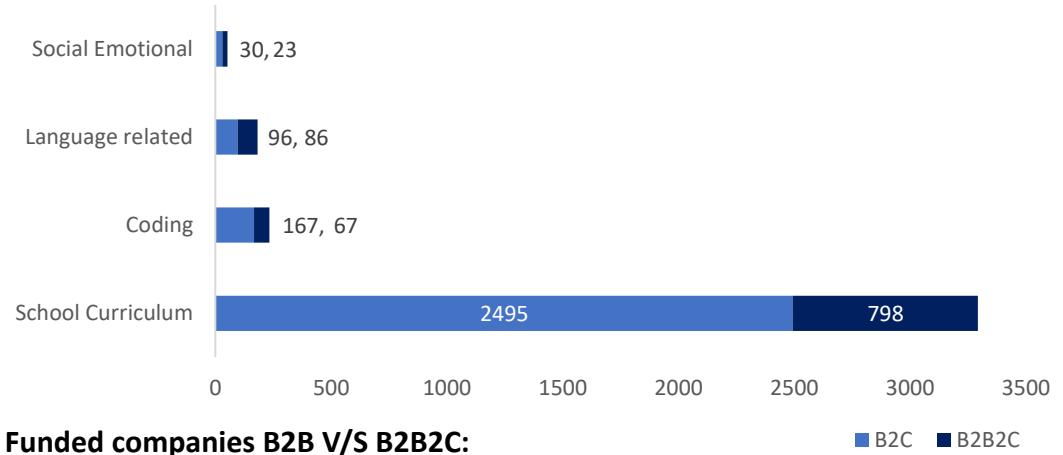
Split of K-12 EdTech companies with percentage funded:

Vertical (Number of companies)



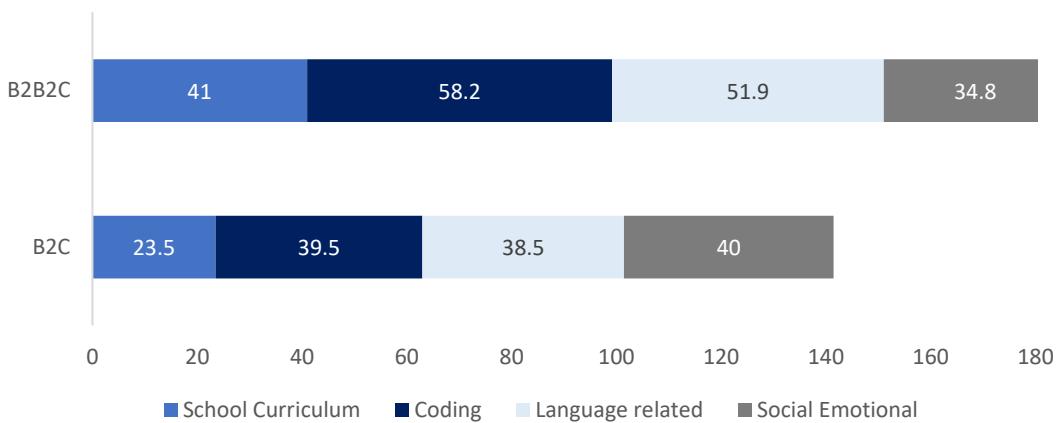
Split of K-12 EdTech companies with percentage funded:

B2C v/s B2B2C



Funded companies B2B V/S B2B2C:

Percentage





B2C K-12 Ed-Tech in Canada

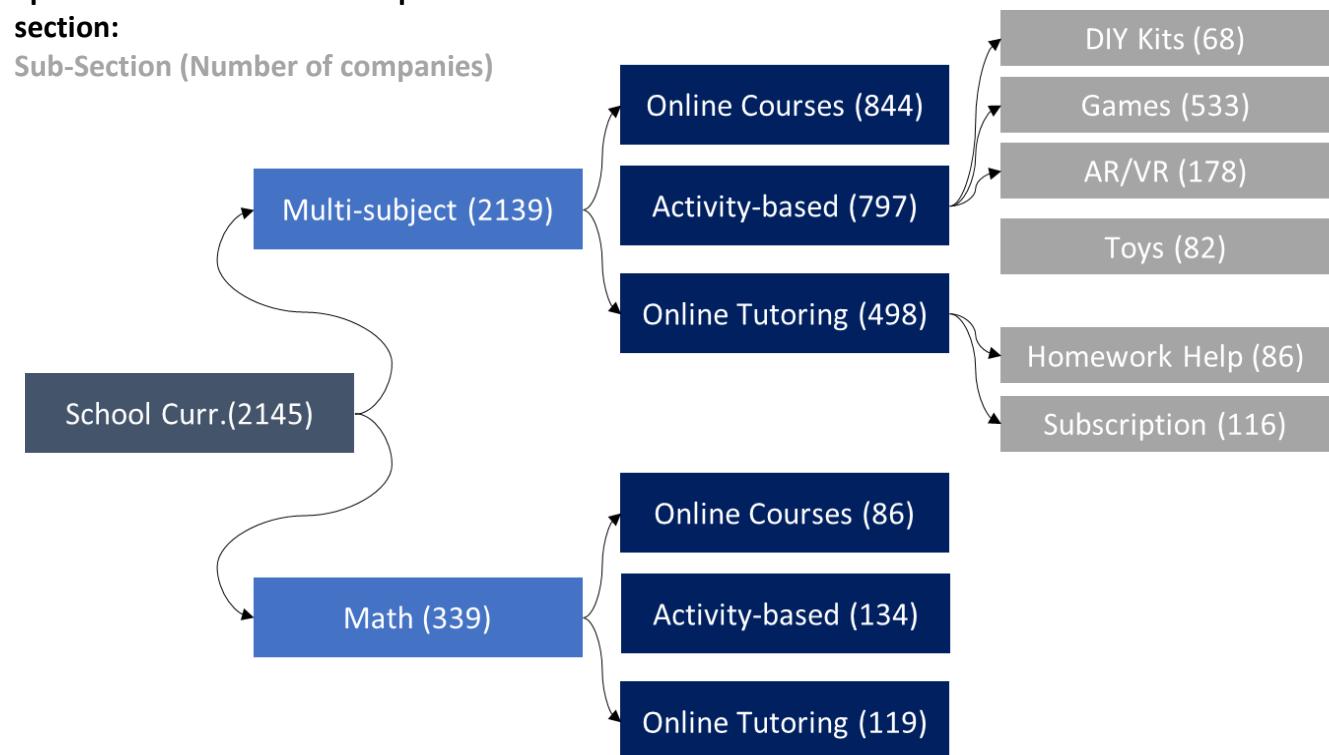


B2B2C: focus on multi-subject online school level courses....

The split of B2C Companies in K-12 EdTech sector is given. School Curriculum occupies a major chunk of the companies under study. The breakdown of School Curriculum section is given below

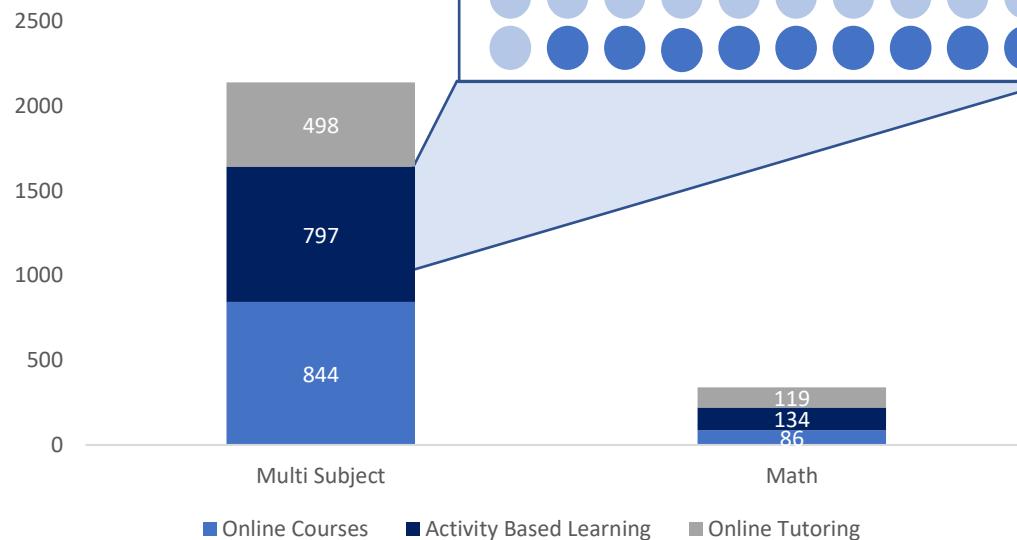
Split of K-12 B2C EdTech companies School curriculum section:

Sub-Section (Number of companies)



Activity Based Learning B2C: Percentage

68% Games
23% AR/VR
9% DIY Kits





B2C K-12 Ed-Tech in Canada

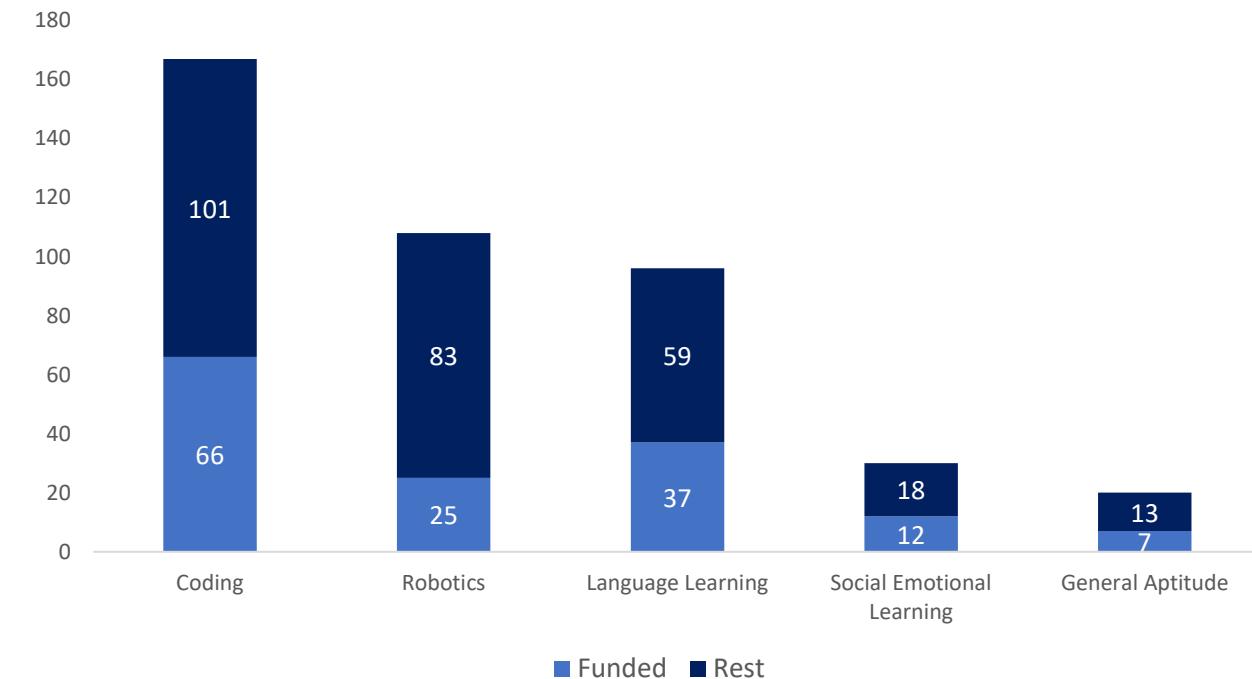


Coding and Robotics being key areas for companies....

Coding and Robotics follow School Curriculum in number of companies. Coding has Online and Activity Based background, while Robotics mainly focuses on DIY Kits and Games.

Other sections:

Number of Companies



Coding:

- Online Tutoring: 43
- Activity Based: 28 → Mainly Games (53) and Toys (70)
- Notable Companies: MIGO, PathFold, CodeCreate, Hello World, codeSpark.

Robotics:

- Mainly DIY Kits
- Notable Companies: Shape Robotics.

Language Learning:

- Diversified: 24
- English: 43
- Reading Proficiency: 25
- Notable companies: SeerEnglish, YUMI Learn, MyLingoKids, Engliser, Ruckus

Social Emotional Learning:

- 12 out of 30 companies funded
- Notable Companies: Mightier, THE SAFE STEPS, Neuromotion

General Aptitude:

- 7 out of 20 companies funded
- Notable Companies: Abound, LogicBooster.



B2B2C K-12Ed-Tech in Canada

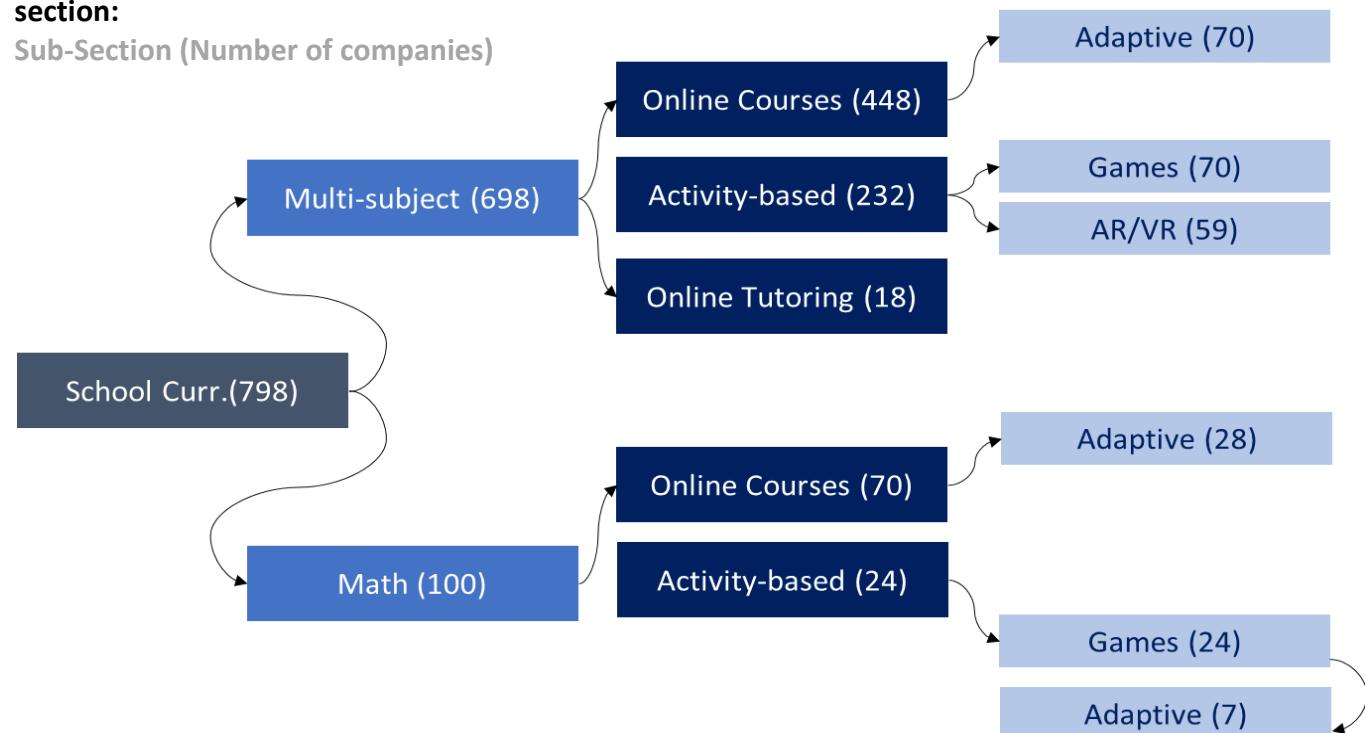


B2B2C: focus on multi-subject online school level courses....

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Split of K-12 B2B2C EdTech companies School curriculum section:

Sub-Section (Number of companies)

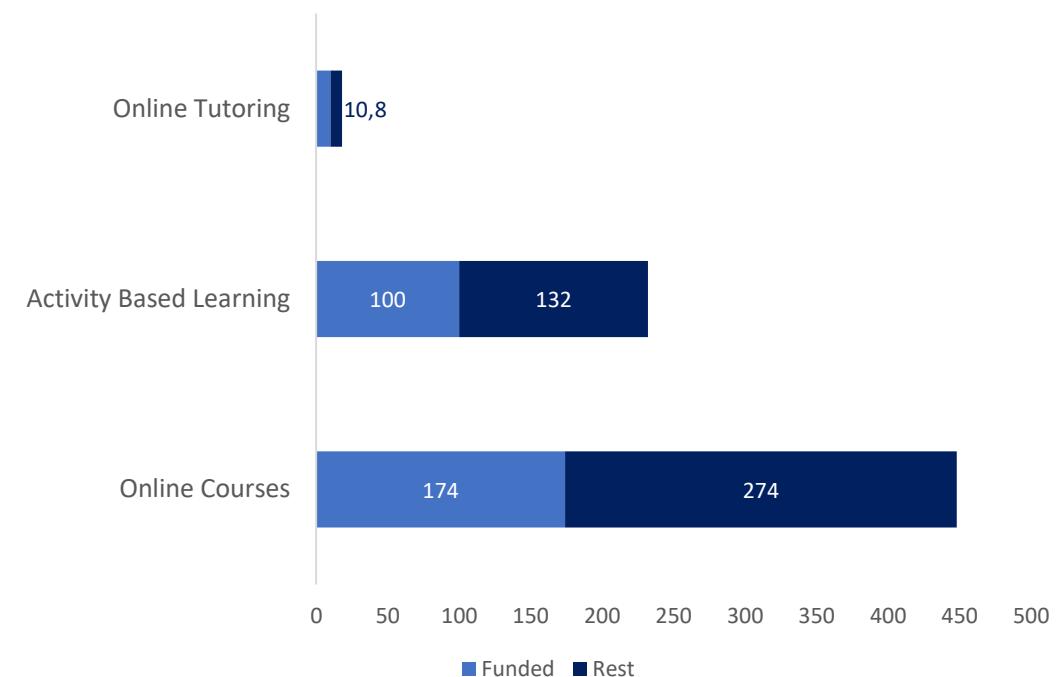


Online courses dominate the B2B2C market also....

With B2B2C Domination, few notable companies are Troxell, Math Remedy, Tutor3D, bSmart, QuBowl. Subject-wise, Math continues to be a dominating subject.

Multi-subject split:

Number of companies funded and not funded





B2B2C K-12Ed-Tech in Canada

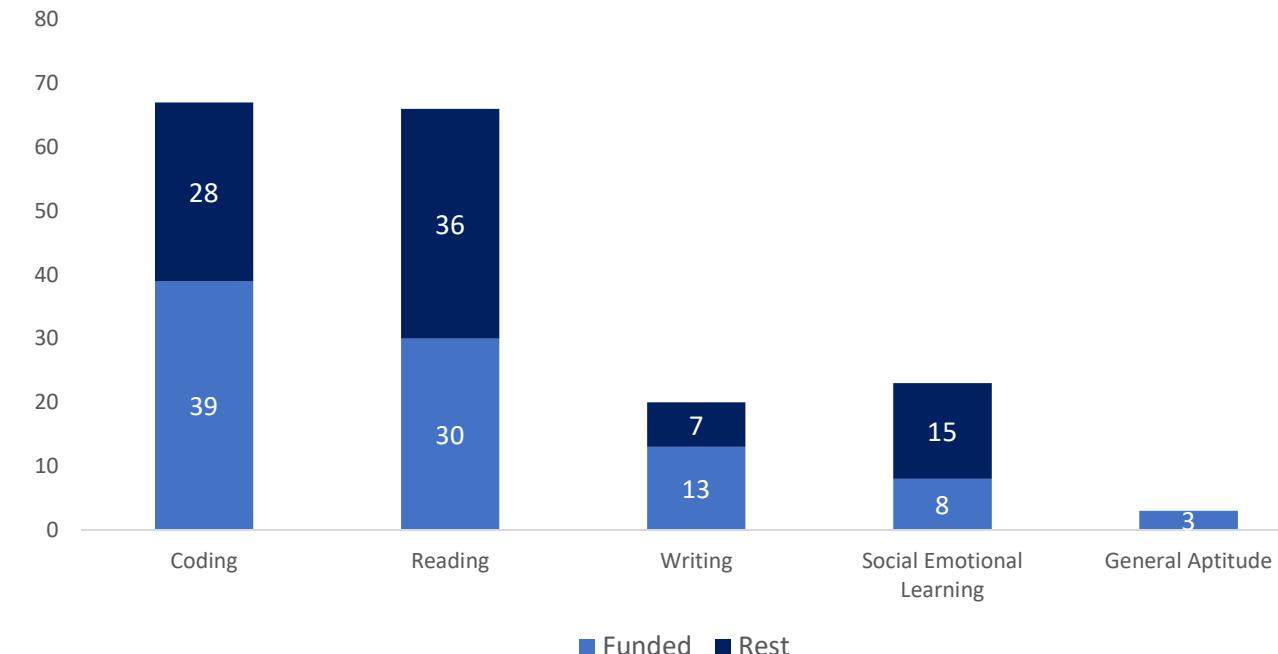


Coding and Language are essential areas

Coding companies come next after School Curriculum. These are mainly online or activity based courses.

Other Sections:

Number of companies



Coding:

- Online Courses: 39
- Activity Based: 28 → Mainly Games (12) and Toys (10)
- 39 out of 67 companies funded
- Notable Companies: RealCoding, Codio, kiwi[create], etc.

Reading Proficiency:

- 30 out of 66 companies funded
- Notable Companies: Gluten Education, Rdeef, etc.

Writing Proficiency:

- 13 out of 20 companies funded
- Notable companies: StoriumEdu, Quill

Social Emotional Learning:

- 8 out of 23 companies funded
- Notable Companies: Programa Semente.

Entrepreneurship:

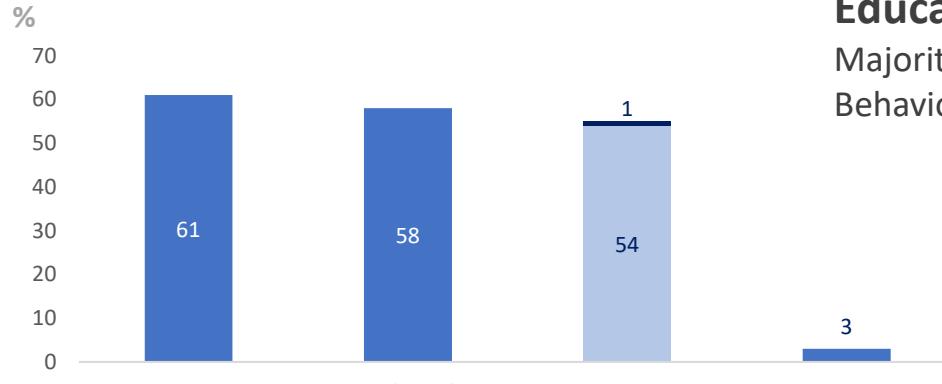
- All 3 companies funded
- Notable Companies: Askultra, Lemonade Stand.



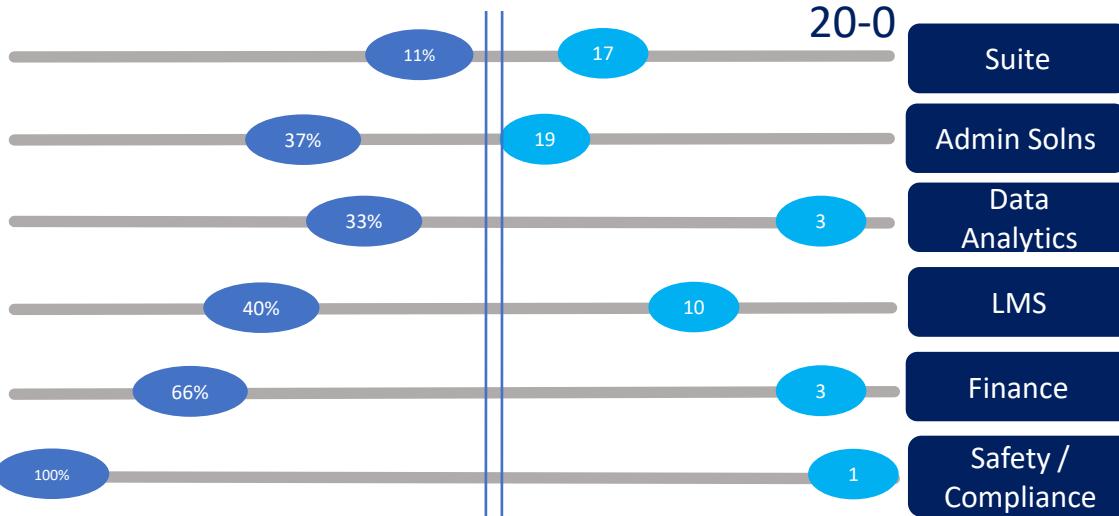
Education IT



Education IT in different verticals

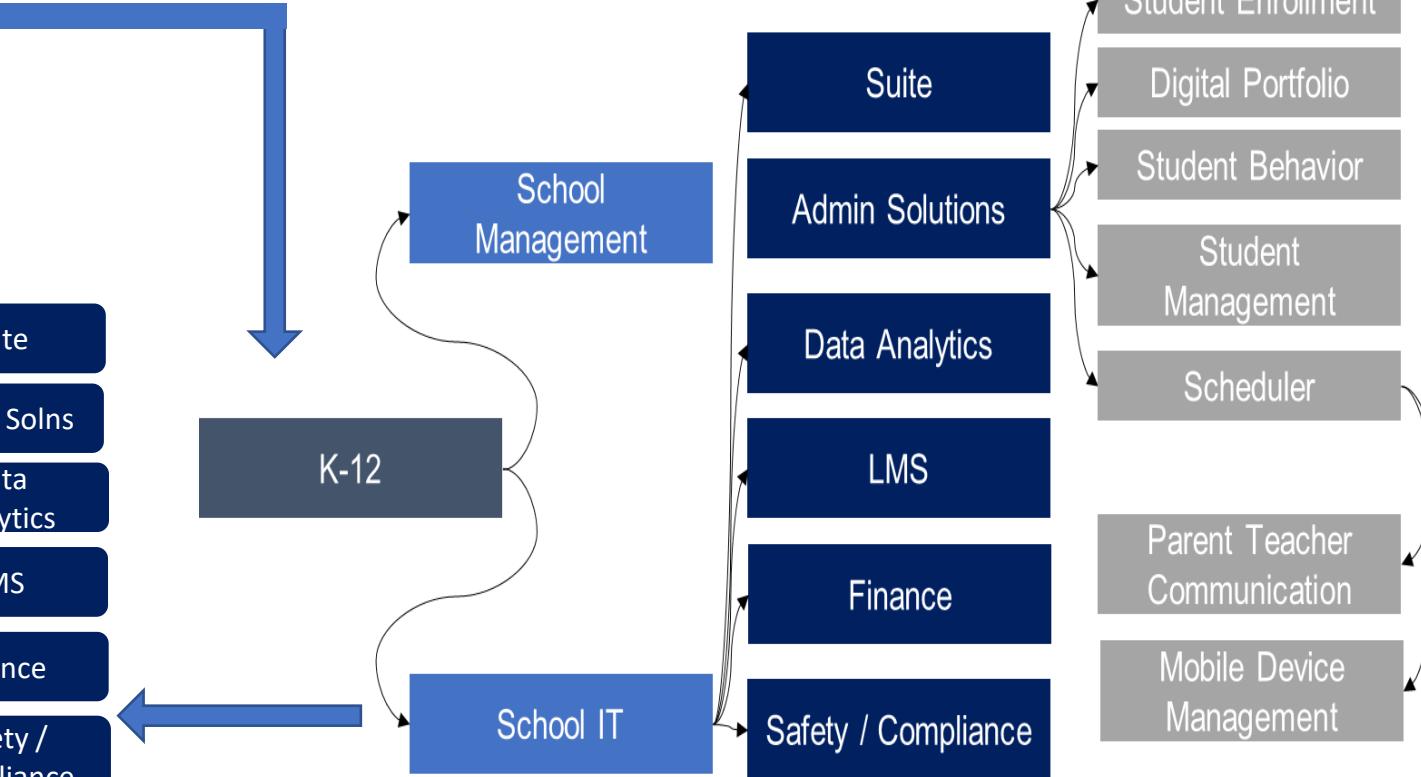


Education IT in different verticals % Funded & Number of companies



Education IT: K-12 EdTech in Canada....

Majority of the companies provide admin solutions with respect to Student Behaviour, Enrolment & Management, Digital Portfolios and Schedulers.





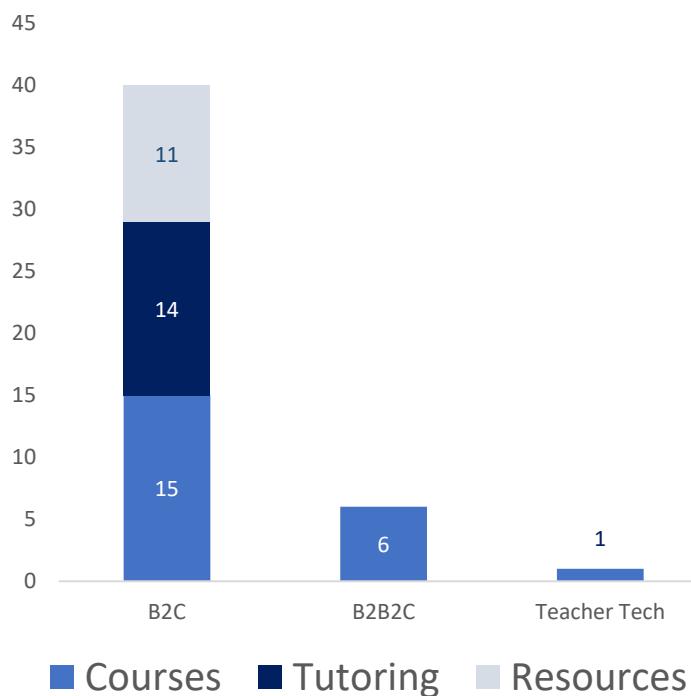
Language Learning: B2C



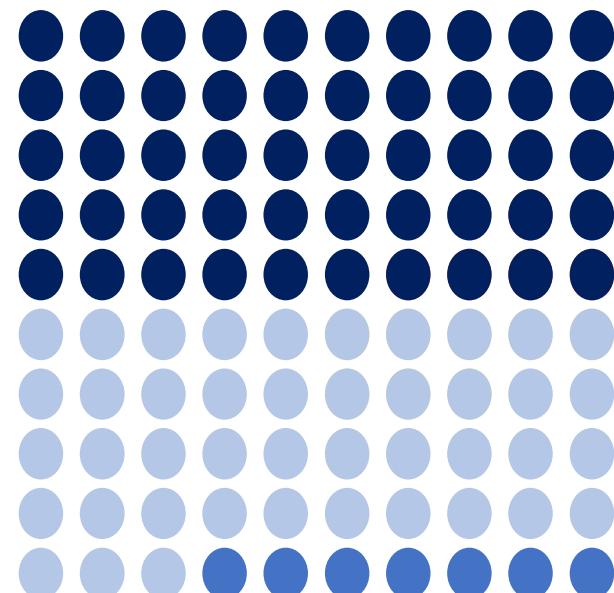
Language Learning is mainly B2C....

Online Courses and Educational Resources include languages such as English, Spanish, Japanese, French.

Language Learning:
Number of companies



Tutoring:
Percentage



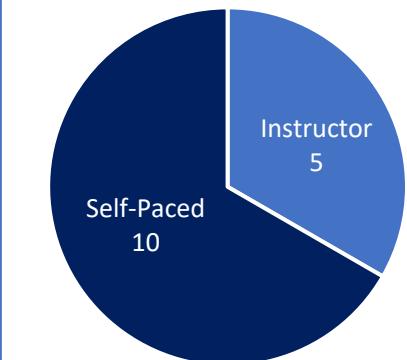
NOTABLE COMPANIES:

Courses: Loving English, 360Learning

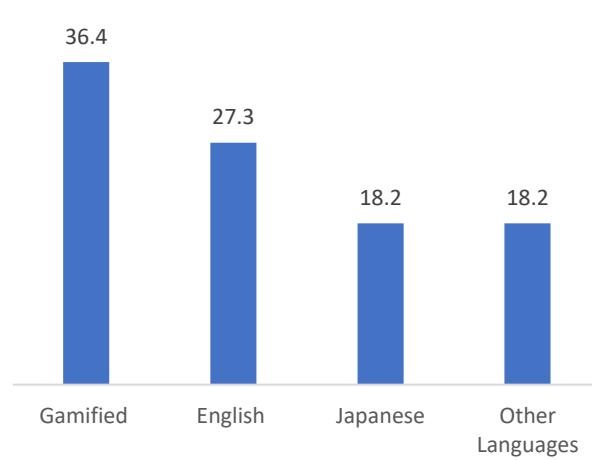
Tutoring: Nanahona Trainig, GOJI, Learnably, Rype

Edu. Resources: LangaLab, PocketGlow, Speax, ESL Library

Online Courses:
Number of Companies



Educational Resources:
Percentage





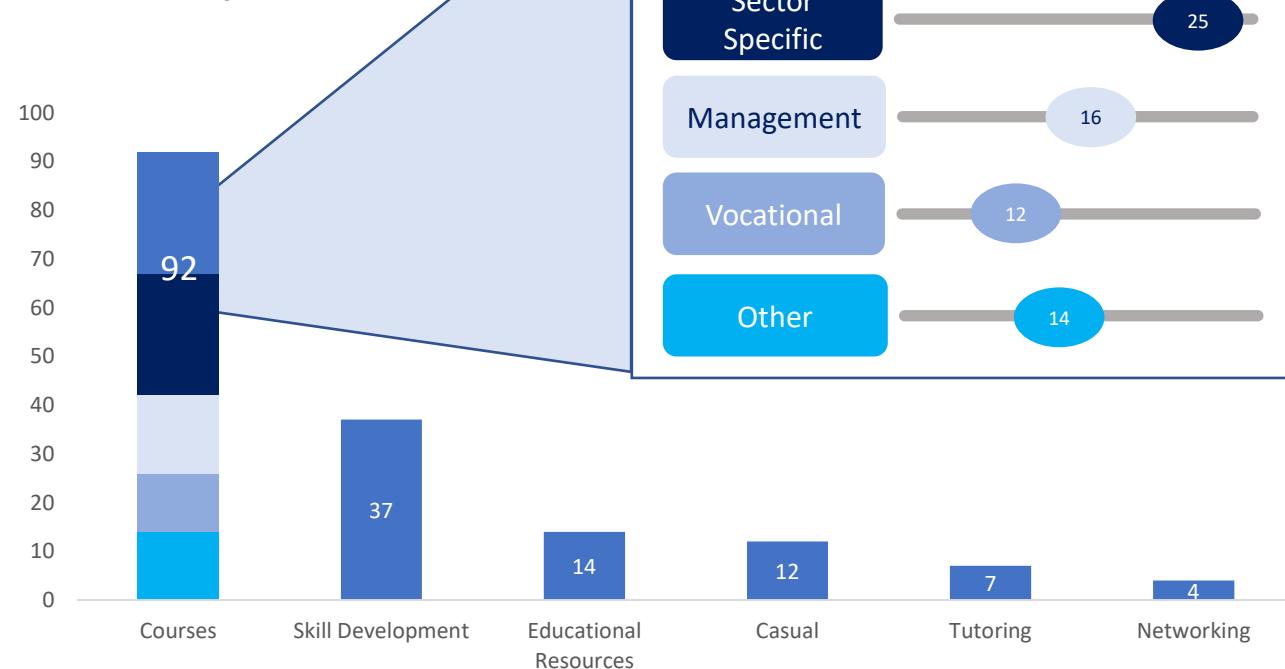
Continued and Corporate Learning



Continued Learning...

Online Courses and Educational Resources include languages such as English, Spanish, Japanese, French. MOOClist, Educor, SafeBoater, ChatterHigh, MeshForm Technologies, etc. are a few notable companies

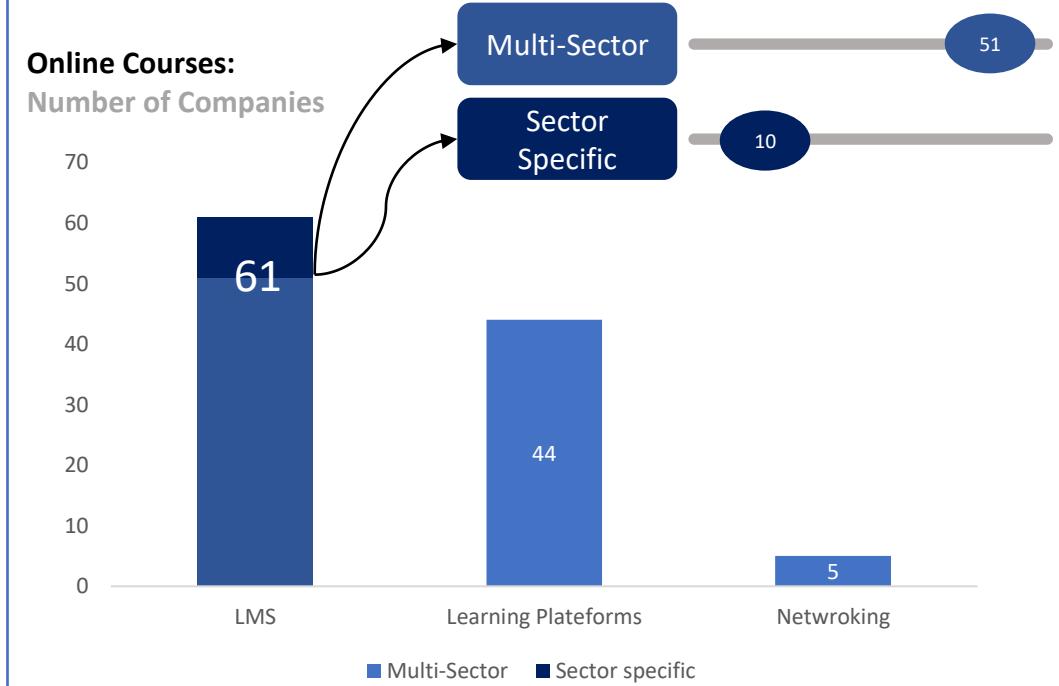
Continued Learning:
Number of companies



Corporate Learning...

Learning Management Systems with a multi-sector overview occupy major share by numbers in the Corporate Learning space. A few notable companies include JumpSeat, Traingpop, Practicit, Cognibox, Instawize, eProf.

Online Courses:
Number of Companies





Pre K-12 and Higher Ed

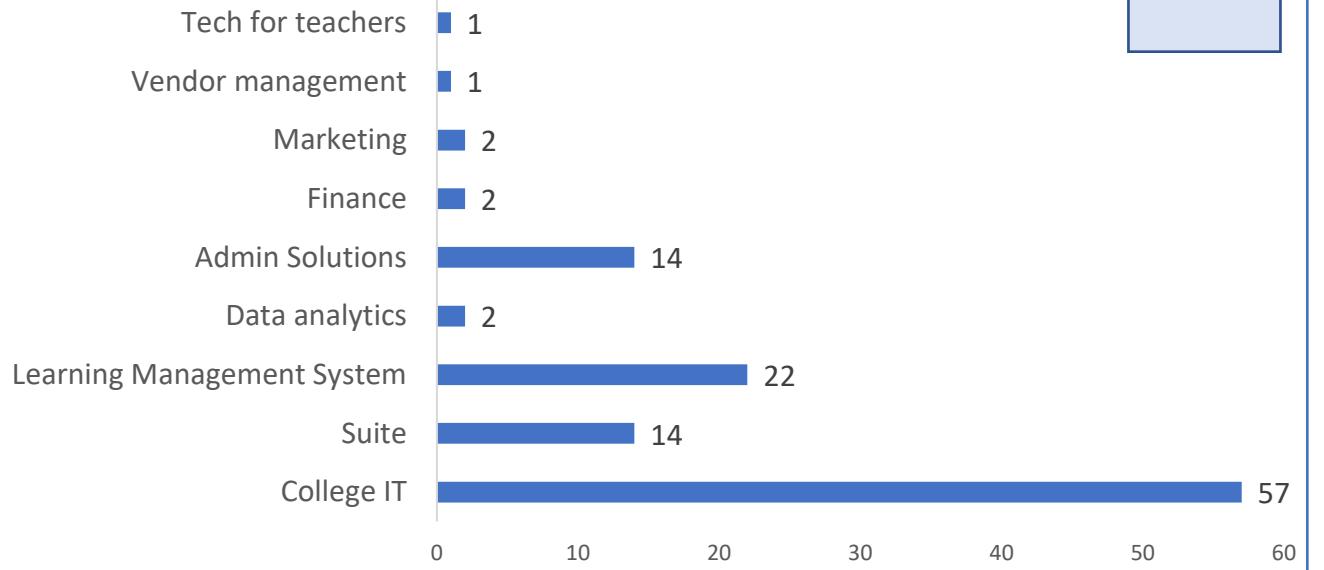


Higher Ed...

College IT, Suite and Learning Management Systems companies are the most widespread companies in the Higher Ed section. Mentrio, Halp, ApplyBoard, MyXd3d, Wize are a few notable companies operating in this space.

Higher EdTech breakdown:

Number of companies



Pre K EdTech...

Daycare App, Zooper Dooper, KinderPass, DaycareIQ, Kidoodle.TV are a few notable companies.

B2C Learning Solutions:

- Digital Storybooks
- Color Books
- Games
- DIY Kits

Pre K School IT:

- School Management Software
- Parent Teacher Communication

Tech For Teachers:

- Content

Play school Discovery:

- Platforms for play-school and online classes discovery

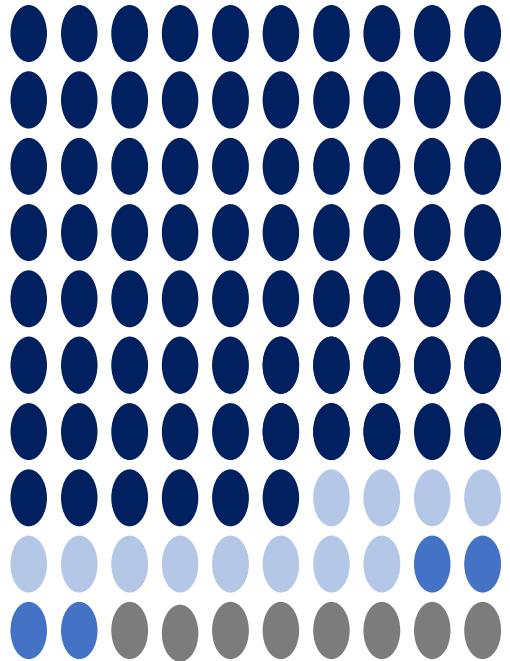
Pre K EdTech split by companies:

76% B2C

12% Pre K IT

4% Tech for Teachers

8% PlaySchool Discovery



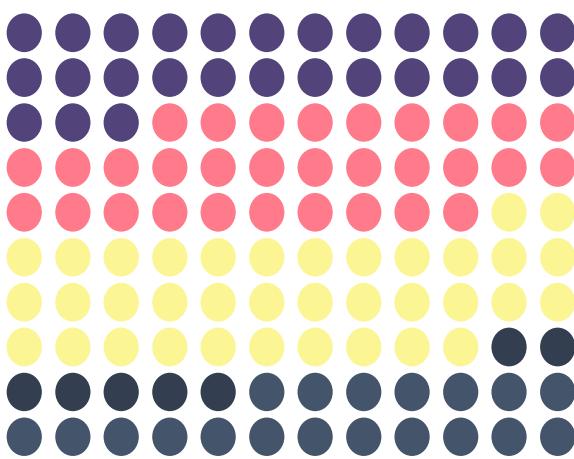
Case Studies



Pre K-12 and Higher Ed



Major 'LEARNING CENTERS' presence in Canada for Math



CENTRES IN CANADA

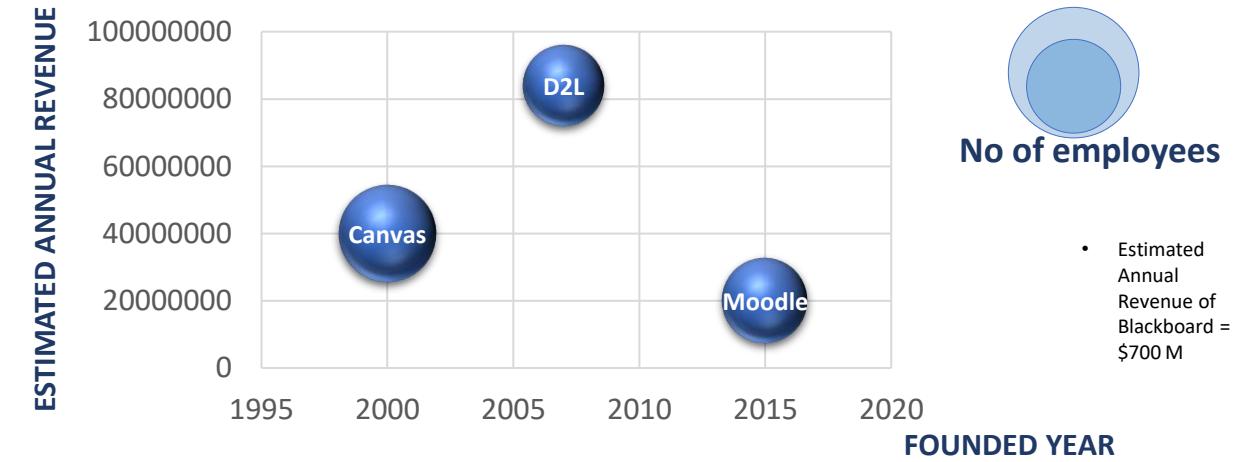
Kumon Math – 331 centres

Oxford learning – Over 100 centres

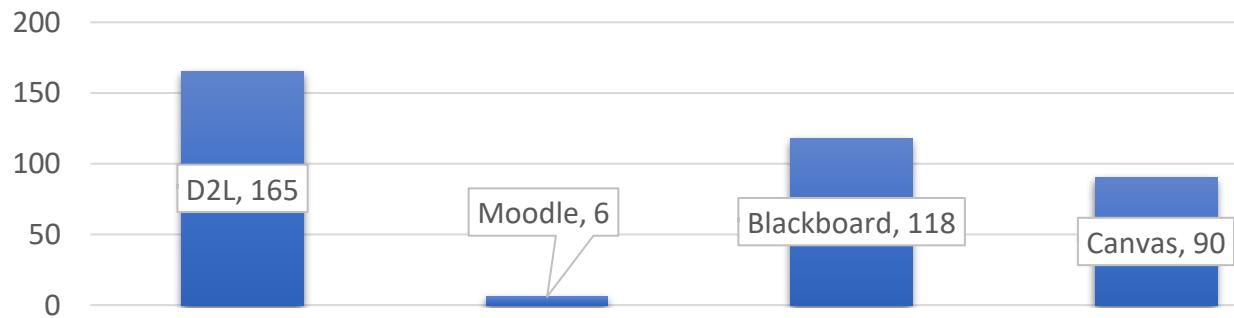
Mathnasium – 85 centres



Major LMS platforms – Annual sales, Employee size and Experience



TOTAL FUNDING OF MAJOR LMS IN CANADA (USD Millions)

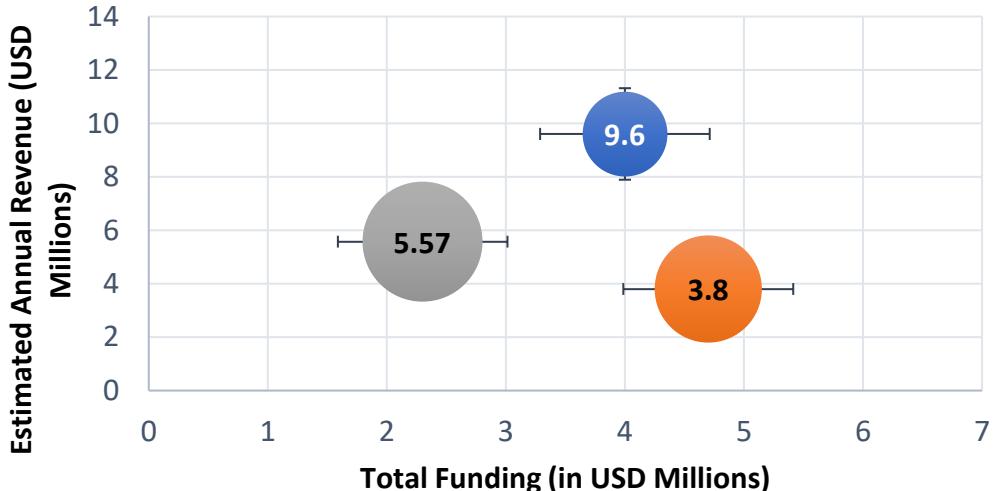




Brief Competitors' Overview



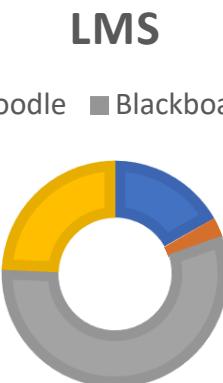
Direct Competitors -Toppr



Users of major online competitors in Canada



Company Size
(in terms of employees)

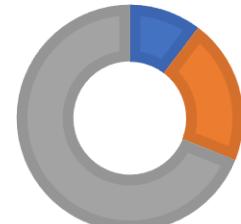


LMS

D2L Moodle Blackboard Canvas

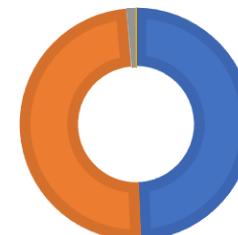
DIRECT COMPETITORS

Rayku Thinkster OneClass



INDIRECT COMPETITORS

Kumon Mathnasium
Superprof Stem Village



Market Snapshot

Players Snapshot

Case Studies

Entry Strategies



Brief Competitors' Overview



D2L | Brightspace

Location

Kitchener,
ON, Canada

Founded

1999

CATEGORY:

Indirect Competitor - Learning Management System (LMS)

USER MARKET:

- Large Enterprises
- Medium Business
- Freelancers

KUMON®

MATH. READING. SUCCESS.

Location

Takanawa,
Tokyo,
Japan

Founded

1954

CATEGORY:

Indirect Competitor - Offline centres for math and reading programs.

USER MARKET:

- From age 2 to grade 12 students

OXFORD® LEARNING

Location

London,
ON

Founded

1984

CATEGORY:

Direct Competitor (Online programs) and Indirect Competitor (Offline Centres)

USER MARKET:

- Age 3-6
- K-12 Segment
- University level students
- Entrance exam prep of U.S.



Brief Competitors' Overview



OneClass

Location
Toronto

Founded
2010

CATEGORY:
Direct Competitor – Class Notes and Study guides

USER MARKET:

- K-12 Segment
- University students



Location
Kendall Park, NJ

Founded
2010

CATEGORY:
Direct Competitor – Online Math Training and SAT coaching

USER MARKET:

- Kindergarten to grade 8 students
- SAT Prep

rayku

Location
Toronto, Canada

Founded
2011

CATEGORY:
Direct Competitor - Online Math program

USER MARKET:

- Majorly K-12 Segment



Key Features – D2L



More than 15 million users



800+ Employees



Quote based Pricing



Language Supported - English



MAJOR COMPETITORS IN CANADA

- Blackboard

- Canvas

- Moodle



Course Design and Delivery

- Accessibility-compliant HTML course templates
- Easily transferable content and Open APIs and LTI Integration to connect to virtually any third party tool



Assessment and Analytics

- Built-in analytics and reporting functionality to analyze information
- Poll students with a self-assessment tool
- Inline assignment grading including feedback or scoring



Content and Collaboration

- Audio and video support for Flickr®, YouTube™, Vimeo™, and virtually any media heightens student engagement
- Microsoft Office 365™ and Google Chrome™ extensions allowing students to directly submit from their applications



D2L Cloud

- D2L provides all infrastructure to deliver applications
- D2L maintains the solution from the infrastructure all the way to the application



Mobile Services

- D2L Binder, a tablet/mobile application, enables students to work with course content and other digital learning resources on-the-go
- Custom mobile notifications and Mobile web and HTML 5 design



End to End Implementation

- Duplicate a production site for integration and ongoing testing
- Tailor the login portal, navigation theme, page background, and widget colors with custom branding
- SIS Integration



Product – D2L



D2L
DESIRE2LEARN

Schools Higher Education Corporate Learning

Login Help

Create inspired learning experiences

Learn how Brightspace can help you



Engage young minds



Drive learner success



Future skill your workforce

[Explore Brightspace for Schools >](#)

[Explore Brightspace for Higher Education >](#)

[Explore Brightspace for Corporate Learning >](#)

VLE Tools:	Portfolio	Lessons	Activity Feed	Rubrics	Assignments	Video Assignments
Document student learning and/or provide feedback	✓			✓	✓	✓
Communicate with students and parents	✓		✓			
Engage students	✓	✓	✓	✓	✓	✓
Align with Ministry expectations	✓	✓		✓	✓	
Integrate with Google Drive	✓	✓	✓	✓	✓	✓
Organize digital resources and activities	✓	✓	✓		✓	

PIEs (Product Idea Exchange) are conducted by D2L, where users can share their pain points and ideas for product improvements directly with D2L's product team.

Market Differentiation:

Brightspace is **one platform for all K12, University and Corporate level learning** with diff content, whereas usually other LMS have different platforms for different segments. For example, Accenture uses Brightspace for a leadership development program whereas all schools in Ontario uses the same platform for K-12 education.

D2L believes its less segmented approach and reliance on a common platform can in some cases lead to an easier sales pitch.

With D2L, there is one platform with combined data sets. Whereas with others, it is potentially two platforms, two sets of data, and multiple integrations.



Strategies – D2L



- D2L FUSION (FLAGSHIP EVENT):

To discover the latest trends, product innovations, and best practices with a community of peers, partners, and industry experts

- **2020 Sponsors** - Blackboard, Bongo, Course Merchant, Intelliboard, Turnitin, UniCheck, Coregrade, Examity, Kaltura, Qwickly, Respondus, Shuffle Exchange, Techsmith, Vital source, Watermark, Xitracs

- D2L Executive Summit

An invitation-only event that brings together a unique cross-section of leaders – in education, policy, and the private sector

- D2L Connections (Regional Events)

- D2L's affiliate Partner : E&I Cooperative Services

- Channel Partners: EnSYNC Corporation, Unit 4, Soft Choice, Genius

- COLLABORATIONS FOR SYNERGY

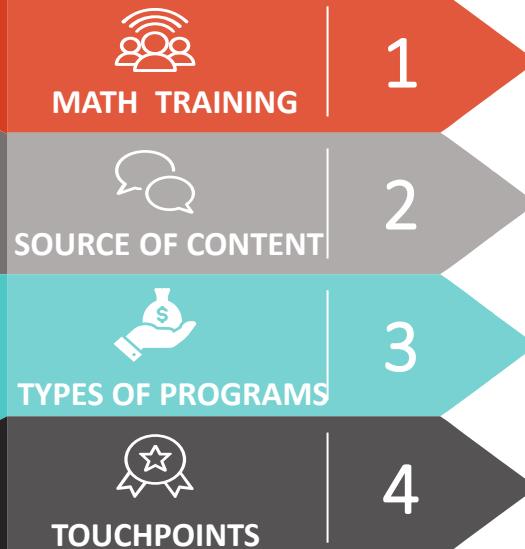
- In 2016, D2L moved its cloud-based learning services to Amazon Web Services (AWS) and adopted NetApp Cloud Volumes ONTAP data management software.

- **Move This World (MTW)** providing a social emotional learning curriculum for Pre-K through high school students has chosen

D2L's Brightspace as their learning platform. Private and Tier 1 colleges prime targets



Thinkster - Curriculum



- Thinkster math's world-class math curriculum is aligned with the U.S. National Curriculum and is designed to build analytical and critical reasoning skills. Have different Math Syllabus for K-8
- **Exam Prep:** SAT (already launched) PSAT, ACT (coming soon)
- Added Common Core strategies and Singapore-based word problems, looked at questions on state tests and competitive exams like **Math Olympiad/Math Kangaroo/Cogat Testing, etc.** and mapped the curriculum to various countries where they are being widely used for e.g. in U.S., Canada, the U.K., South Africa, Australia and India.
- **Have 3 tutor-led programs:** Silver, Gold, and Platinum. All 3 have a certified-teacher creating a learning plan and monitoring/grading the child's work on a daily basis.
- Subscription levels **cost** anywhere from \$80-\$2088, all plans come with daily grading and student feedback features, but the more expensive packages include extra tutoring sessions for longer durations along with homework help.
- Aggressively markets its **Free Trial program**. **Have various touchpoints** for that over their site.
- Provides reward points, medals and e-gift cards to the students for keeping the student motivated.
- Two conferences per month with parents of the coaches and has an app for parents too.



Expansion and Reach



In April 2020, Thinkster acquired SelectQ and with this acquisition, Thinkster will transform from a tutoring company to a hyper-personalized knowledge acceleration platform company that caters to any educational content. The hyper-personalization serves three different user groups – students, tutors and parents.

MAJOR SYNERGIES CREATED:

1

Curriculum Growth

In addition to Math, Thinkster will be adding content across grade levels, including Honors and AP Level STEM subjects, and competitive test preparations such as SAT (already launched) and ACT courses.

2

Global Presence

It will also expand its services to additional English-speaking regions such as the UK, India, Australia and growth countries like Brazil with increased employees to about 60 in total.

3

Qualitative variables

The core hyper-personalized platform provides the following offerings to its users: tailored training, tutor empowerment and additional parent insight.

- SelectQ was founded in 2017 and presents students with practice SAT math and English questions.
- It charges \$79 a month for access & one practice test, or \$249 for 6 months of access & 5 practice tests.

- Ideal for **bloggers and other content-rich sites** that cater to homework help, parenthood and homeschooling communities.

- **What Influencers and bloggers get:**

- For every free trial sign-up they bring in, they get \$1 commission
- For every new subscription, they get a 10% commission.



THINKSTER
VILLAGE

- A **free Facebook Group**, open to anyone, anywhere for global community of people dedicated to finding a way to improve the state of education for generations to come.



Future Plans - Thinkster



CURRENT WORKING OF THE THINKSTER PLATFORM:

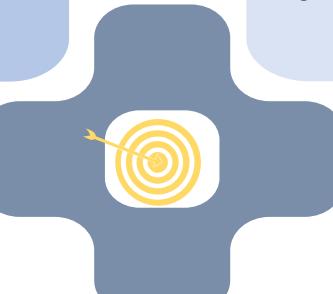
Thinkster's math lessons are aligned to state and Common Core standards. Students can access explainer videos for problems they don't understand, even when not connected to the internet. Parents can review reports to show students' strengths, weaknesses and progress toward goals and can message tutors as needed. The app is accessible on all devices.

FUTURE PLANS

- The company is interested in adding more subjects, like physics and GMAT test prep, in the future. They'd like to sell their services to schools and educators, but they believe selling directly to consumers is much faster.

- Thinkster is still pursuing other acquisitions, says the CEO. The company will also focus on growth in the U.K., India, Australia & Brazil
- Also, Thinkster claims that their platform has seen a net increase in traffic and sales since the outbreak as parents research additional learning tools for children.

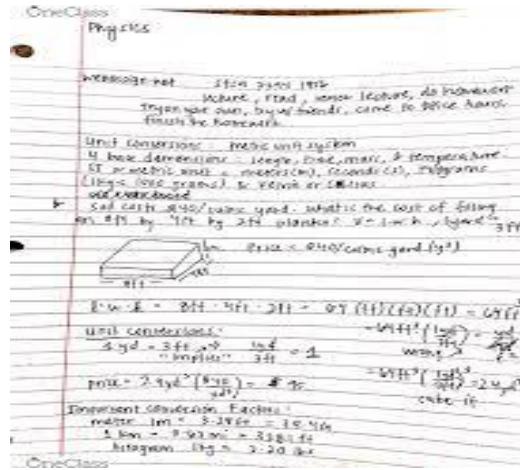
- Main competition brick-and-mortar tutoring centers like Kumon and Mathnasium.
- The company claims it serves thousands of students across more than 30 countries. The vast majority of Thinkster students are in the U.S.



* These future plans have been claimed by the CEO of the company.



Competitors push you to achieve more!



MATERIAL

- Class Notes
- Textbook Notes
- Study Guides
- Exam solutions
- Exam Prep

Both B2B and B2C network.



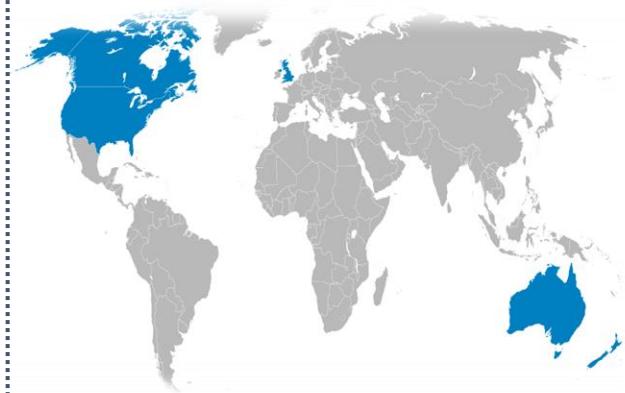
PRICING

Premium study content & homework help answers for any course

- Monthly - \$39.98 per month (Billed monthly)
- Quarterly - \$19.98 per month (Billed 59.94 every 3 months)
- Yearly - \$9.98 per month (Billed 119.76 annually)

Without homework help
Single Document -\$39.98

Only Homework Plan
Full access for \$2/month



REACH

Countries covered: Canada, Australia, New Zealand, UK, US

Users:
More than 2.2 million worldwide including Canada as one of the main markets



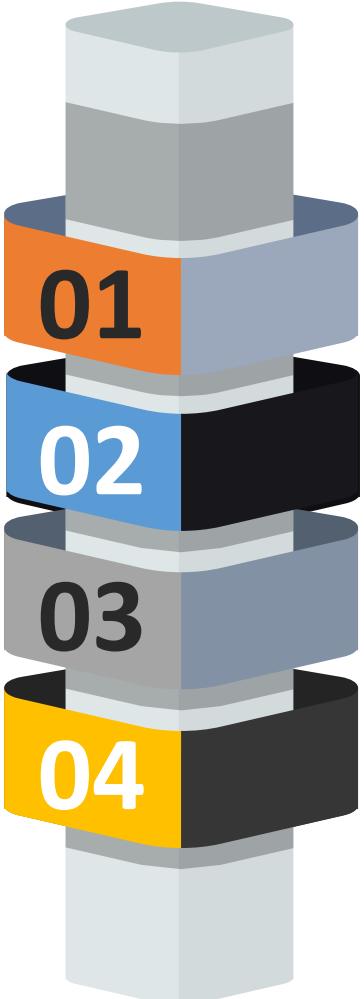
- Online math tutoring platform, works with Canada and US users.
- It also source great videos from proven libraries, such as **Khan Academy** and **Virtual Nerd**.

Pricing

- The Lite plan includes 1 one-hour tutoring session each week (4 per month) at \$100/month.
- The Regular plan includes 2 sessions each week (8 per month) at \$160/month.
- The Accelerated plan includes 4 sessions each week (16 per month) at \$300/month.



General Insights - Kumon



The Kumon Method is an individualized, ability-based math and reading program for **children of all ages and abilities**.

As Kumon originated from Japan, Canada's tutoring industry doesn't match the heavyweights of Korea or Japan but it's quickly growing. Kumon, for example, has some **330 centers across Canada**.

The Kumon math program has produced **Olympiad English and Science Medalists** and top rankers

Kumon's English program focuses on reading and comprehension, apart from factoring in phonics, sound parts and advancing to grammar, punctuation, reading and writing skills. CD books are given for children to listen to before they start their work in order to learn specific pronunciations.

Why different from private tuitions?

Kumon is not based on a school curriculum and exists independently of it, although the material consists of Math and English and is derived from international syllabi. Also, age is not a determining factor. Older children can be at lower levels and vice versa.

- Mostly **conducts 2 classes per week in their centers** and during the other five days, children need to finish 5 worksheets at home, with each worksheet amounting to 30 minutes.
- Worksheets and Curriculum prepared by Kumon faculty



Pricing and Franchising in Canada - Kumon



Pricing in Canada:

- New Student Enrollment Fee:** \$50
- Book Fee:** \$30
- Monthly Tuition:** \$120 to \$150 per subject (with a maximum of 2 classes per week, the fee varies from different provinces)

Franchising:

- Cost of opening a Kumon Centre in Canada:** \$64,400-\$1,60,975
- Business Incentives provided by Kumon:**
 - Up to \$19k provided by Kumon to get you up and running
 - Area development and research conducted by Kumon to identify location for the business



Available provinces in Canada: Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland, Northwest territories, Nova Scotia, Nunavut, Ontario, Prince Edward Island, Quebec, Yukon and Saskatchewan, all with different expansion areas. Total approx. – 331 centres in Canada



Kumon Vs Competitors



Based on School Curriculum



Digital worksheets



Worked Examples



Offline Centres



Worked Examples



More affordable



Curriculum

Pricing

Method of Teaching

Learning



Math-only learning program for pre-K students through high school.

Math program average between \$200 and \$300 per month

Mathnasium method focuses on a student's ability to understand math concepts and its logic.

4-5 Students are taught similar topics at one time

Math and Reading programs for pre-K to high school.

Kumon's rates vary by location, and monthly costs can average \$150 per subject.

Focuses on timed repetition, and students will repeatedly practice until mastering a single concept.

Self learning and individualized platform



Oxford learning Centre



Age Group	Program name
Elementary and Secondary school students	ONLINE TUTORING PROGRAM – VIRTUAL TABLE
Ages 3 – 6	Little Readers and R.E.A.D. Elite
Grades 1-8	Beyond Tutoring
Class 9-12	Advance High School Success Program
Grades 1-12	French Program (En Francais)
College entrance exams of U.S	GPA 5.0 SAT & ACT TEST PREP
Grades 5-7, applying for grades 6-8	SSAT MIDDLE LEVEL
Grades 8-11, applying for grades 9-12	SSAT UPPER LEVEL
Grades 1 – 12	ESL PROGRAM
Grades 7 – 10	MATH PROGRAM
For High school/ College / University students	STUDY SKILLS PROGRAM
Grades 7-10	4 hour Program

Different Programs conducted both online and offline by Oxford Learning Centre.

- They also provide their franchises. **They have over 100 centers in Canada in different provinces.**
- **Prices at Oxford Learning** vary from one franchise to another but locations surveyed around Toronto charge between \$385 and \$420 per month for two hours each week.
- Recently DIC Corp. entered into an acquisition agreement dated February 5, 2020 (the “**Acquisition Agreement**”) with Oxford to acquire the trademarks and certain other intellectual property rights utilized by Oxford in its pre-school, elementary and secondary school and post-secondary supplemental education business (the “**Oxford Rights**”) for a purchase price of \$44.0 million

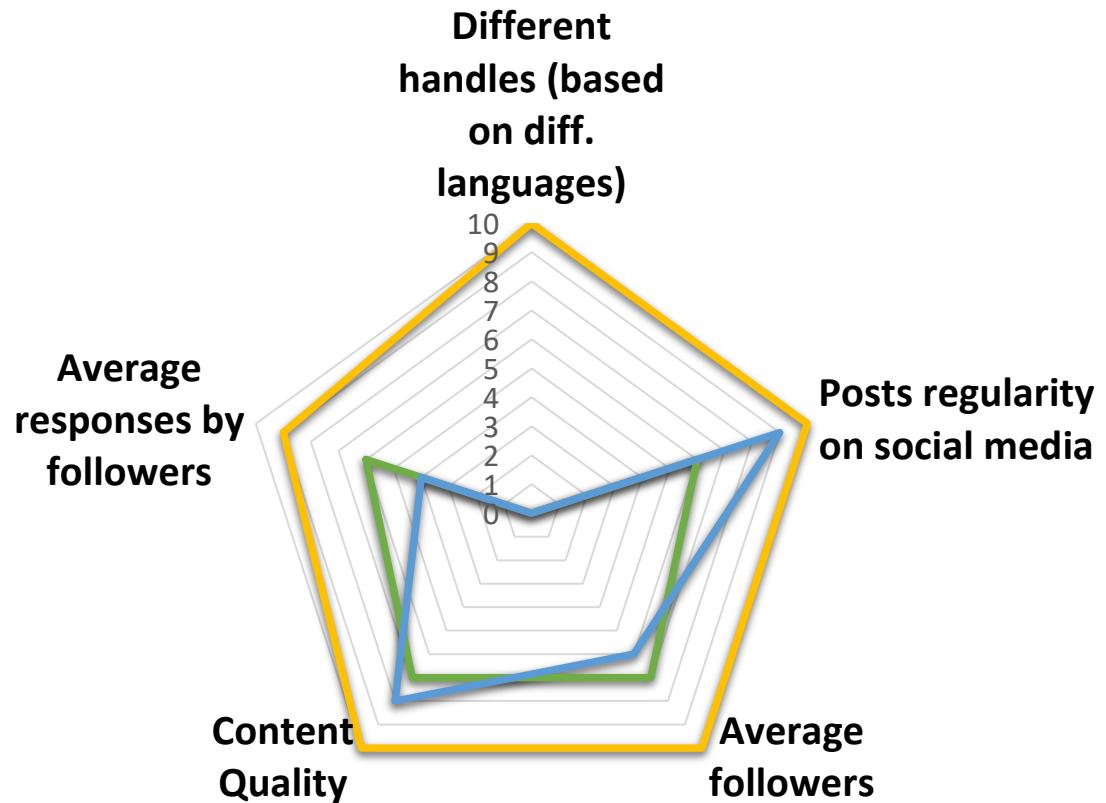
* During COVID-19. the Centre is providing all the courses in Online format.



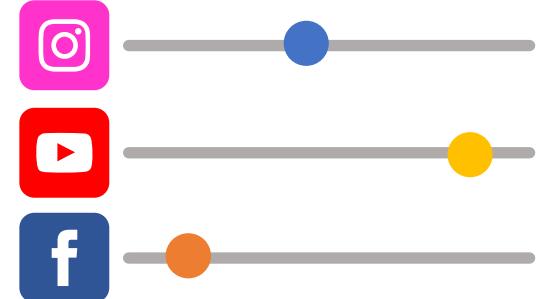
Social Media Presence - Comparison



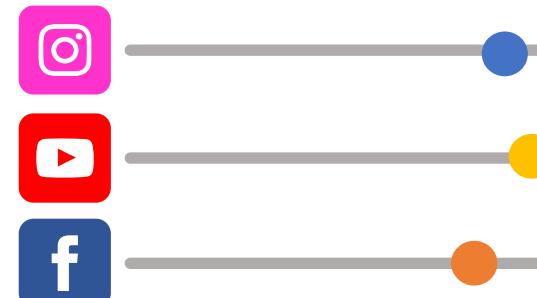
— D2L — Thinkster — Kumon



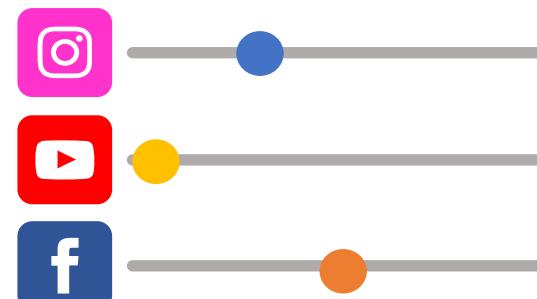
D2L™



KUMON® MATH. READING. SUCCESS.



THINKSTER MATH





Players in the Market – Brief Comparison



	D2L Brightspace	THINKSTER MATH	OneClass	rayku	KUMON MATH. READING. SUCCESS.	OXFORD LEARNING
SEGMENTS COVERED	<ul style="list-style-type: none"> • K-12 • University • Corporate (an LMS platform) 	<ul style="list-style-type: none"> • K-8 segment for maths • Competitive exams 	<ul style="list-style-type: none"> • Notes and homework for K-12 segment • Notes for University students • Exam Prep notes 	<ul style="list-style-type: none"> • K-12 segment 	<ul style="list-style-type: none"> • Programs for children of age 2 to age 14 	<ul style="list-style-type: none"> • School students • Competitive exams • University/College Students
PRICING	<ul style="list-style-type: none"> • Quote based pricing 	<ul style="list-style-type: none"> • Subscriptions - \$80-\$2088 • Free trial available 	<ul style="list-style-type: none"> • Monthly, quarterly and yearly plans • Yearly plan - \$9.98 per month (Billed 119.76 annually) 	<ul style="list-style-type: none"> • Lite plan - \$100 per month • Regular plan - \$140 per month • Accelerated plan - \$300 per month 	<ul style="list-style-type: none"> • Enrolment and Book fee - \$80 • Monthly Tuition - \$120 to \$150 	<ul style="list-style-type: none"> • Monthly fee - \$385 to \$420
SUBJECTS COVERED	<ul style="list-style-type: none"> • Depends on the institute 	<ul style="list-style-type: none"> • Math (predominantly) • SAT (launched this year) • ACT and STEM subjects coming soon 	<ul style="list-style-type: none"> • All, depending on the demand of the major subjects in the country 	<ul style="list-style-type: none"> • Math 	<ul style="list-style-type: none"> • Math • Reading program (English and Verbal) 	<ul style="list-style-type: none"> • Math and English Program • Skill development Program • SAT, SSAT, ACT programs • French program • Other subjects' online tutoring
COUNTRIES	<ul style="list-style-type: none"> • United States, Canada, Singapore, Australia, Europe, and Brazil 	<ul style="list-style-type: none"> • U.S., UK, Canada, India, Australia, and South Africa. 	<ul style="list-style-type: none"> • Canada, Australia, New Zealand, UK, US 	<ul style="list-style-type: none"> • Canada and USA 	<ul style="list-style-type: none"> • 50 countries and regions including U.S., Canada, Africa, India etc. 	<ul style="list-style-type: none"> • Canada, USA, China, Bahamas, Bermuda, Kuwait, Qatar, India and others

Market Snapshot

Players Snapshot

Case Studies

Entry Strategies



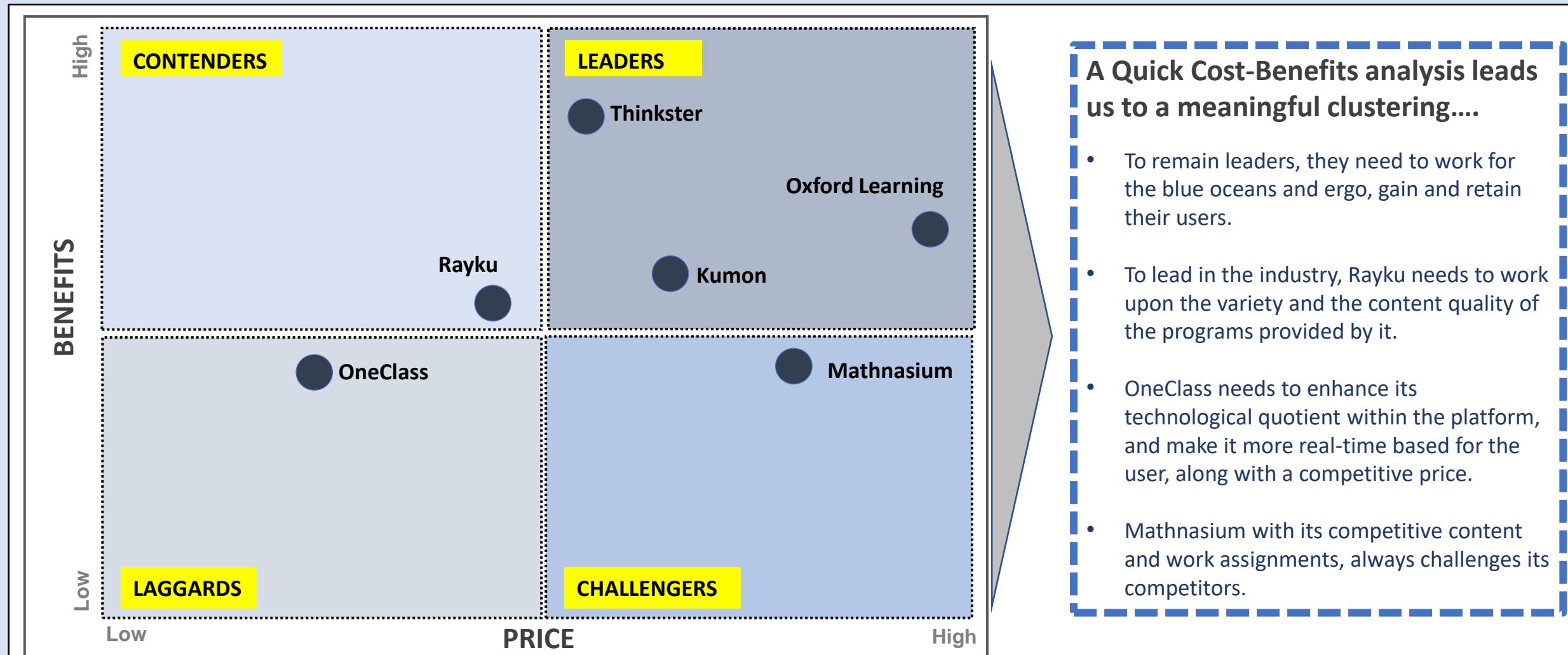
Compared Features of Competitors



	D2L	KUMON	THINKSTER	ONECLASS	OXFORD LEARNING
Based on School Curriculum	●	○	●	●	○
Cost Effective for students	●	○	○	●	○
Adaptive	●	●	○	○	○
Parents' Involvement	○	○	○	○	○
Competitive Exams' Coaching	○	○	○	○	○
One-to-one Teacher Support	○	●	○	○	●
School homework help	○	○	○	●	○
More AI driven for child's growth	○	○	●	○	○
English and Reading Program	○	●	○	○	●
Feedback facility	●	●	○	○	○



Competitive Landscape



Partnerships





Augmented Reality/ Virtual Reality



Virtual reality

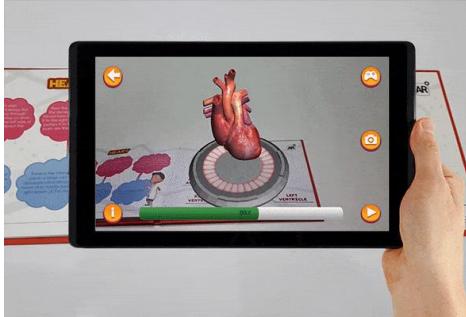
implies a complete immersion experience that shuts out the physical world. Users can be transported into a number of real-world and imagined environments

Benefits of VR in Education

A 360 view of any content gives a more realistic feel, being part of the same environment, students can view it with profound detail

Improves concentration power by not being distracted by the real world

Provides a complete sensory experience where they can virtually touch, see and hear the content at the same time

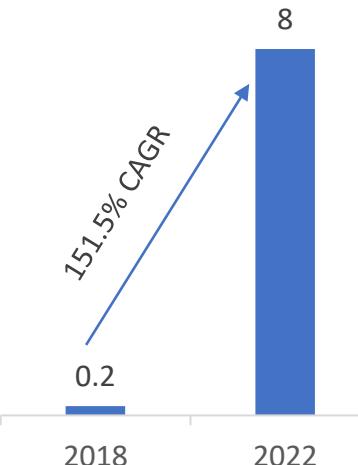


3.3 Million users in Canada which account for 2.5% of global users

97% of students would like to study course through VR

Education is expected to be **4th Biggest Sector for VR investment**

Canadian Market Size For AR/VR in Billion CAD



Augmented reality adds digital elements to a live view often by using the camera on a smartphone.

Benefits of AR in Education

Helps to visualize the topics better giving a clearer concept clarity	More interactive experiences means the tech-savvy students would remain engaged and interested in learning process	No investment in hardware and can be experienced using existing devices through an application
---	--	--



Using emerging technologies like AR/VR, artificial intelligence, machine learning, robotics, block chain, and IoT systems help companies to create value within their businesses, and ensures that they remain relevant in a rapidly evolving market.

Founded
2009
Owned by
Unity
Head Office
British Columbia

Partnership

Engage Toppr's RnD team to develop a AR based app for greater user experience and engagement in visualizing the content

Will be a long term project of 8-9 months

Can cost up to \$200,000 to \$300,000 which could be paid initial or through a % share of future earnings

Should be executed after 1-2 years of established presence in the country to gain more traction

Some projects undertaken from clients:-



EmbodyRelax, a VR experience that uses biometrics to monitor a person's stress levels within a dynamic virtual environment



MEC showcases highly realistic, life-size 'virtual' tent models that communicates key product information such as size, capacity, and aesthetics through AR



Sphero Edu an app-enabled educational program and delivered the first visual programming language for a mobile device

Past Clients



Other possible partners

- Blueprint Reality
- Janus XR
- Suometry

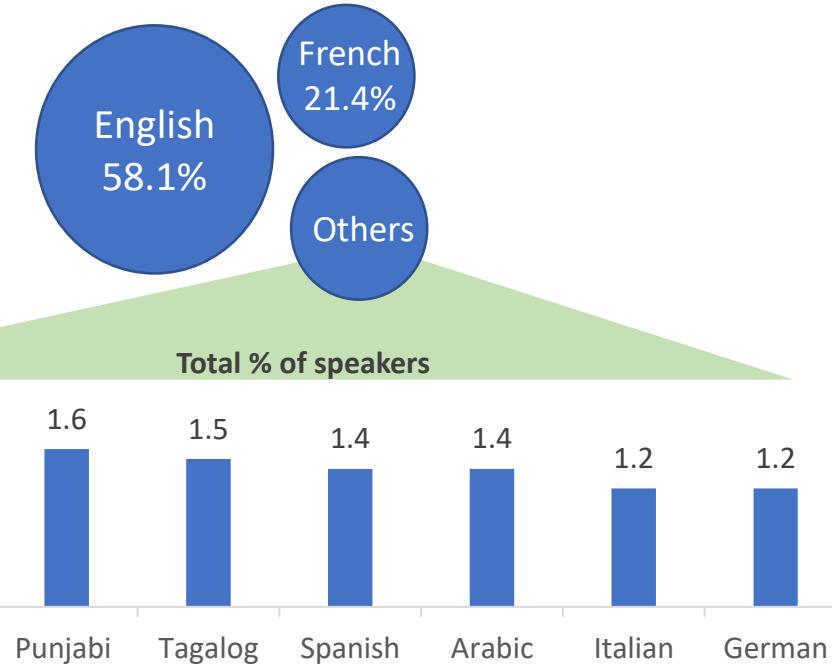


Language Diversity



Immigrant Language growth 2011 → 2016

Tagalog (Pilipino)	35.0
Arabic	30.0
Persian (Farsi)	26.7
Hindi	26.1
Urdu	25.0
Gujarati	18.8
Punjabi	18.4
Russian	14.1
Spanish	12.3
Korean	11.0
Tamil	10.6
Vietnamese	6.4
Portuguese	3.7
Greek	-2.3
German	-3.3
Polish	-5.5
Italian	-10.9



>200

languages as a mother tongue

80%

of the population reported speaking an immigrant language at home lived in one of Canada's 6 largest metropolitan areas

11.5%

of the population reported speaking both English and a language other than French at home an increase of 960,000 persons in 5 years

20.6%

of Canadians (6.8 million people) reported a mother tongue other than English or French

What is it in for TOPPR?

1

Content should be developed in 3-4 popular languages apart from English and French to cater to a larger audience

2

Migrants coming from specific countries like China and India can be targeted to get accustomed to language and culture of Canada through short courses



Fluent.ai is a speech recognition provider offering accurate, fully embeddable speech recognition solutions in any language.

It's models learns from context, behavior, and speech expressing the flexibility to understand natural phrases reliably across languages, accents and noise environments.

Any Language, Any Accent



Has unique speech-to-intent technology providing high accuracy speech recognition in every language

Small Footprint and Embeddable

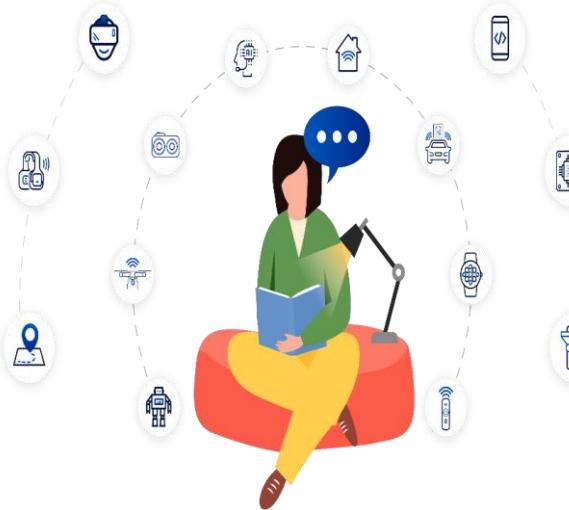


Requires minimal power and storage requirements, and embeds speech understanding capabilities on even the smallest of devices



Works both online, offline

Add voice user interfaces to disconnected and low-bandwidth devices with our offline speech recognition.



Year founded

2015

Funding Info

\$4M in 3 Funding Rounds

Yearly Revenue

\$5M-\$10M (2018)

Headquarter's Location

Montréal, Quebec



A potential partnership to make the content available in various languages spoken across Canada by migrants And making the app respond to voice instructions rather than touch commands



A revenue sharing based model can be proposed in the negotiation

Fluent.ai is backed by leading [investors](#) including BDC Venture Capital, DHVC, 500 Startups, Generation Ventures and others

Recent Partnerships by Fluent.ai

- COMMAX INC.
- Ambiq Micro



Gamification is a trend that is subtly changing the way we learn, work, and possibly... live



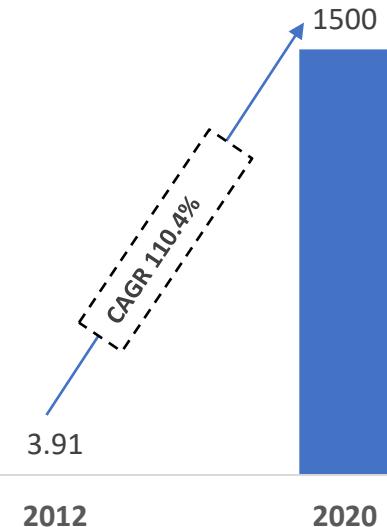
Benefits of gamification in education

Gamification of activities is one of the best ways to achieve the ultimate goals of every teacher-.

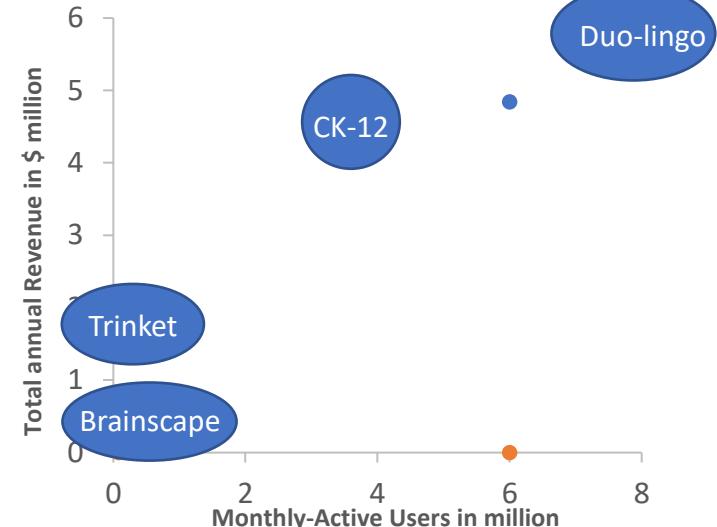


- Works for **all ages** to boost motivation and release their creativity
- Companies using gamification enjoy up to **7X** higher **conversion rate** and increase of **customer interactions** by up to **40%**
- Gamification participants score **14%** higher in **skill-based assessments**
- **62%** of people claim they would feel more motivated if given the chance to **compete** with their peers
- The **dedication** and **vigor** with which kids play video games can be channeled in for a creative and academic environment
- Gives a **sense of recognition** for the student when they accumulate points and move on to the next level

Education Gamification market value in \$ million



Edtechs already using gamification



Key drivers for gamification

97% of kids play video games

63% of people feel that playing games is important for children

89% claim that if a task is gamified, they feel eager to complete it and are in a competitive mood

42% of Canadian households own a console gaming device



Potential Partnerships



Behaviour Interactive Inc. is a Canadian video game development studio specializing in the production of 2D and 3D action/adventure games for home video game consoles, handheld game consoles and personal computers.

Founded
1992

Revenue per year
\$113.1M per year
Head Office
Montreal, Canada

Has relevant experience to employ gamification for businesses

Customers served
200 million



Notable clients



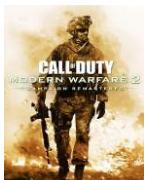
Beenox Inc. is a game development studio specializing in creating innovative technology and original games for PC platforms and game consoles. The company has delivered over a dozen AAA title ports

Founded
2000

Revenue per year
\$196M per year
Head Office
Quebec, Canada

Acquired by Activision (US gaming publisher) which has a massive reach

Customers served
250 million



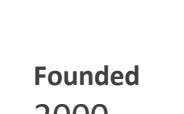
Bunchball provides cloud-based software as a service gamification product intended to help companies improve customer loyalty and online engagement

Enormous client base in different industry verticals

Founded
2005

Revenue per year
\$1-10M per year
Head Office
California

Customers served
70 million



BigDoor Media Inc. develops and publishes an online gamification and loyalty platform that helps companies increase their traffic and revenue through social rewards and increased user engagement. BigDoor markets its services through the world wide web.

Founded
2009

Revenue per year
\$5.6M per year
Head Office
Seattle, Washington

Big customers include





BeEd LMS - ALL IN ONE SCHOOL MANAGEMENT SOFTWARE SYSTEM



Launched in May 2017, it's the first Asian company to be accepted into Helsinki-based xEdu, Europe's leading business accelerator for EdTech. It recently joined forces with Estonia's SchoolOS. It currently operates in south-east Asia, Africa and Europe

- A secure AI-powered solution that helps parents to track their children's progress, and the admin in management tasks.
- It improves traditional learning processes to make parent-school communication efficient, effective and engaging as well as encouraging an efficient use of human resources



Features for Parents:

- Monitor children's progress and receive big insights live
- View the pupil's educational journal
- Review peer performance and child's weak areas



Features for Teachers:

- Managing daily tasks
- Reduced paperwork
- Online directory to upload resources(questions/lessons) to be accessed on the go
- Better & effective communication with parents



Features for Headmasters:

- Make notes for pupils
- Review educational journals
- Review studies statistics
- Improve school management at national scale

What benefits it reaps for Toppr

Will act as an added feature on the platform

Gain a huge customer base round the globe

Gather info about various education systems around the world, beneficial since Canada has a huge migrant population

Derive data insights from child's school performance pertaining to their weak concepts and develop/curate content accordingly



ApplyBoard



Founded
2015

Total Valuation
\$1.4 Billion

Head Office
Ontario, Canada



Bene

ApplyBoard simplifies the study abroad search, application, and acceptance process by connecting students around the globe, recruitment partners, and academic institutions on one platform.

200% month-over-month surge of new schools signing up for its service



Has partnerships with 1,200+ primary, secondary, and post-secondary educational institutions, and with 4,000+ recruitment partners across North America



Has become the world's largest online platform for international student recruitment, assisting 100,000+ students with their educational journey



One of the fastest-growing technology company in Canada

Synergy and Implementation

Insights from Higher education preferences will help in developing relevant content

Applyboard gains access to the large Indian market catered by Toppr

Toppr in turn gets the vast customer base through offering courses for university entrance exam preparation which can be redirected from Applyboard to Toppr

Collaborative advertising for mass reach



Financial Literacy



Deployment of Personal Finance Courses through collaboration with private MBA tuition centres for middle school and high school kids will act as a magnet for many customers

93% agree it is important to learn about finances at an early age

67% know where to learn about investing and personal finance

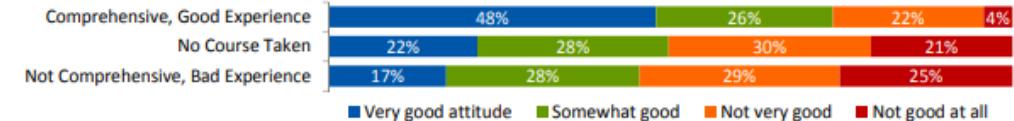
60% agree it's important to have a written financial plan

Problem
Students leaving high school and many adults have been reported to have weak financial skills and little knowledge of the financial realities they will face

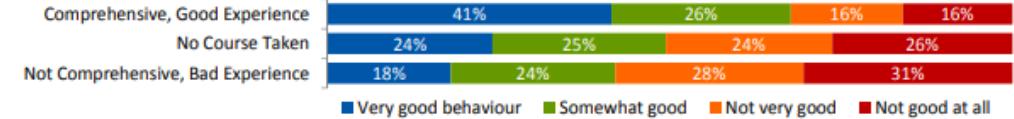
Result
No financial planning poses a higher risk of bankruptcy and financial stress
More vulnerable to scams and frauds

Solution
Teaching students financial skills and giving them the practical abilities and knowledge right from school education will help in effective management of finances

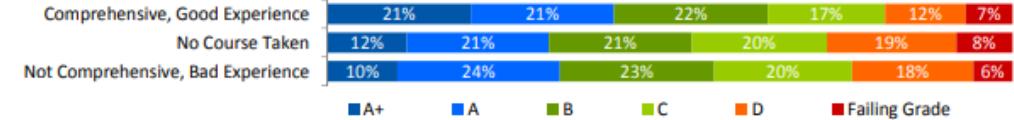
Impact on Financial Attitudes



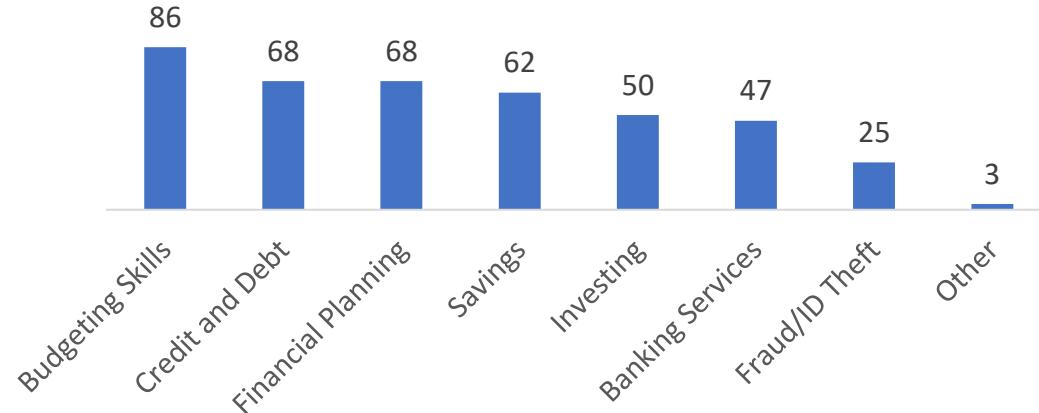
Impact on Financial Behaviour



Impact on Financial Knowledge



Financial Topics Covered in Financial Literacy Courses





Go To Market Strategy



Feature

Designing a chat bot to for communication skills and language proficiency



Target Audience

Students of elementary school and those willing to learn a new language

Benefits

With time the bot will have enough data to train students faster and more effectively
Initial investment will be compensated with fewer employees needed to develop content and resolve doubts in future

Introducing short courses for academic revision for Canadian culture



Migrant students joining middle school or high school
College students and working professionals migrating to Canada

Help in coping with the change in education system
Get them acquainted with Canadian culture and history geo-politics for better ease of living

Incorporating effective use of flashcards



Last moment exam preparation for students and those preferring crash courses

Last moment exam preparation for students and those preferring crash courses
Enabling students to build their own cards for personalized experience



Go To Market Strategy



Feature

Animation content and teaching by means of cartoons/Comic strips



Target Audience

K-5 segment of students

Introduction of weekly contests on platform and announcing topper of the week



All platform users

Adopting a study planner and making learners set daily and weekly goals



All enrolled program learners weather paid/free

Benefits

Cartoons are quite popular in Canada among kids (with 98% watching atleast once a week) This will keep the kids engaged and help in learning the difficult content with ease and better retention of taught content

Induce a healthy competitive environment among the participants and build an active community

Ensure greater retention of clients and give them a nudge to come back and complete the tasks
Notifications can be sent for due dates creating a sense of virtual parenting



Advertising



Targeting bloggers and content influencers

- 5,760,000 blog posts published per day and Canada holds a whooping 5.5% share
- What Influencers and bloggers get:-
For every 10 redirects from their blog, they get \$1 commission
For every new subscription from the redirects, they get a 10% commission



#dailyquestionchallenge

- Can be launched in which a challenging puzzle can be shared between friends through social media
- The solution will be unlocked after the challenge is forwarded to peers, thus forming a chain creating mass awareness of the platform



Targeting bloggers and content influencers

- Maintaining an active presence on online doubt resolution/question answer platforms including Quora StackExchange Yahoo Answers etc
- An incomplete reference and a redirecting link to Toppr website can increase site activity and greater conversion chances

New products and services win in the marketplace if they help customers get a job done better and/or more cheaply

Free Trial



Freemium



Acquiring customer by providing a partial or complete product to prospects free of charge for a limited time

Providing access to part of a software product to prospects free of charge, without a time limit.

Reasons

User adoption is bottom-up and viral.

The product experience would be materially diminished for buyers by kicking out free users.

Free users have low willingness to pay so trying to tax them would be unsuccessful anyway

The likelihood of a sale increases over time with the growth in free users

The functionality demanded by buyers is different than that by free users, thus easy for a functionality-based paywall to distinguish between the two

Disruptive strategy.

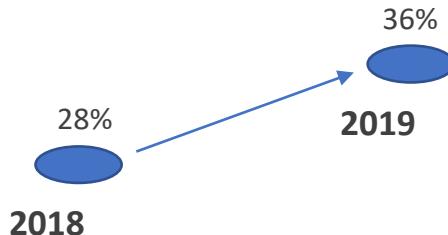
Target is a population of overserved customers or non consumers with a new product or service offering that enables them to get a job done more cheaply than being offered by competing solutions.



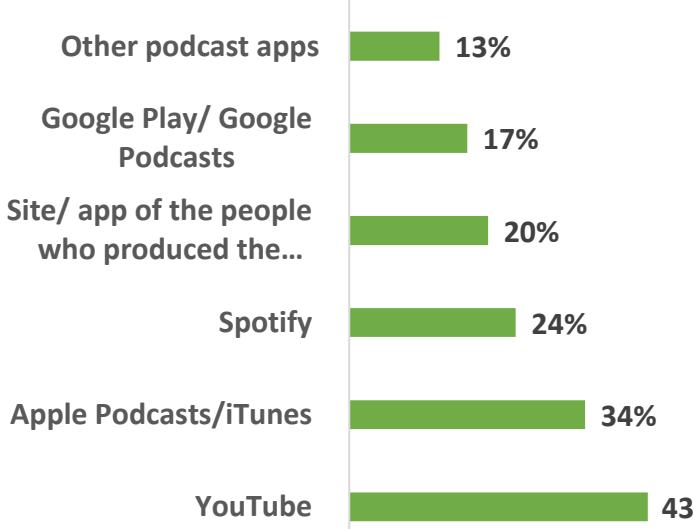
Podcasts



% Podcast Listeners in Canada



Platforms Used to Access Podcasts in Past Year



69% of the listeners agreed that podcast ads made them buy or try out the service/product

Competitive Cost

More scope of innovation

a proven compelling platform

Higher acquisition & Conversion rate

4.4X
effective
than
display ads

10%
upliftment
in average
purchase
intent

Average Advertising rates for Podcasts

- \$15 for a 10 – second ad CPM
- \$18 for a 30 – second ad CPM
- \$25 for a 60 – second ad CPM

*CPM – Cost per mile / 1000 users

Estimation of Cost:

Choosing a podcast with an average of 10,000 listeners after filtering out the needed specific genres.

The cost of advertising will be per CPM:

- \$150 for a 10 second ad
- \$180 for a 30 second ad
- \$250 for a 60 second ad

The cost of 60 second ad with 1,00,000 listeners is \$1500

10 Seconds add may be appropriate for advertising

THE END

Meet the Engagement Team:



Sabhareesh
Muralidaran, IITG



Himanshi Jindal,
SGGSAC



Hritvik Patel, IITG



Utkarsh Gupta, IITG



Shreekumar
Sunderray, IITG



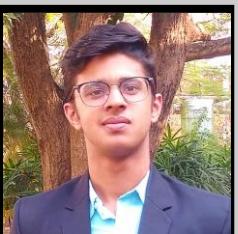
MEET TEAM DHIPROMETHI!

**Sabhareesh Muralidaran****Managing Partner**

- RedSeer, EY, Futures First, Ather Energy, Cover Genius
- Consulting Head at IITG

**Mohit Doddi****Senior Partner**

- Futures First, Unicorn India Ventures, ISB Hyderabad
- Zenith Fund Manager, IITG

**Ritvik Pandey****Utkarsh Gupta****Utsav Kadam****Sudhanshu Bhatia****Kunal Agarwal****Aashrith Vathsal Rao****Hritvik Patel****Akshita Jain****Maneshwar Singh****Shreekumar Sunderay****Nikita Sadhnani**