

2025 EdTech Taiwan Expo

Market Research & Audience Analysis

Presented by Diana Shih



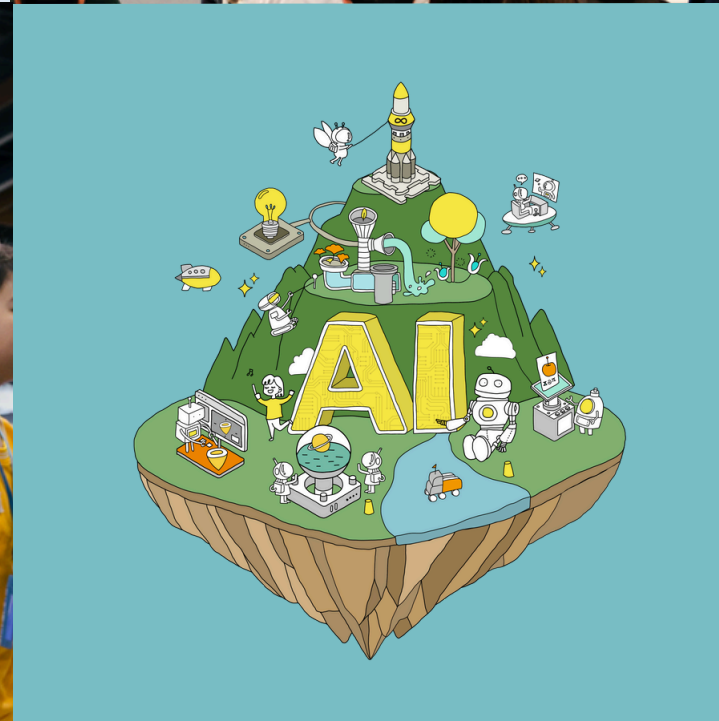
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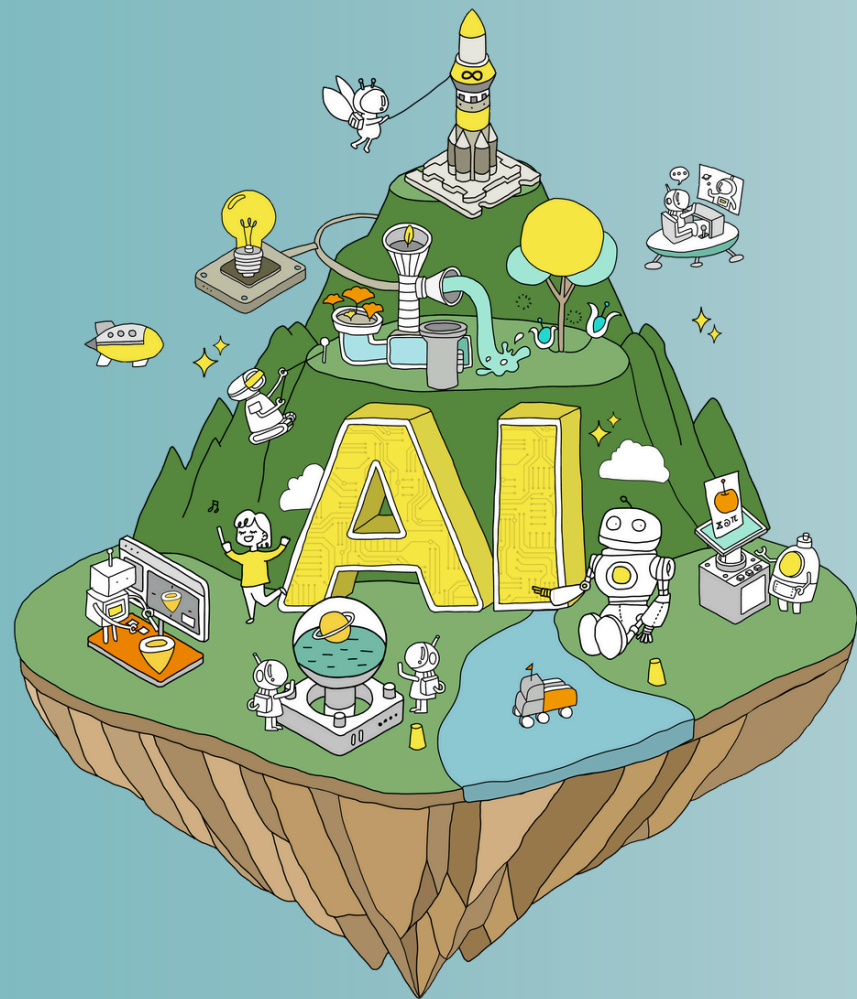
臺灣教育科技展
EdTech Taiwan



台北市電腦公會
TAIPEI COMPUTER ASSOCIATION



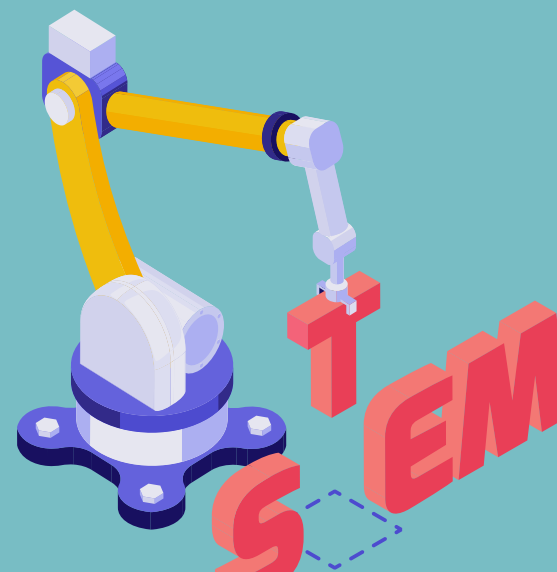
Agenda



01. Taiwan's EdTechMarket Overview and Trends
02. Challenges & Opportunities
03. Market research & Audience Insights
04. Educator Personas & Expo Strategies



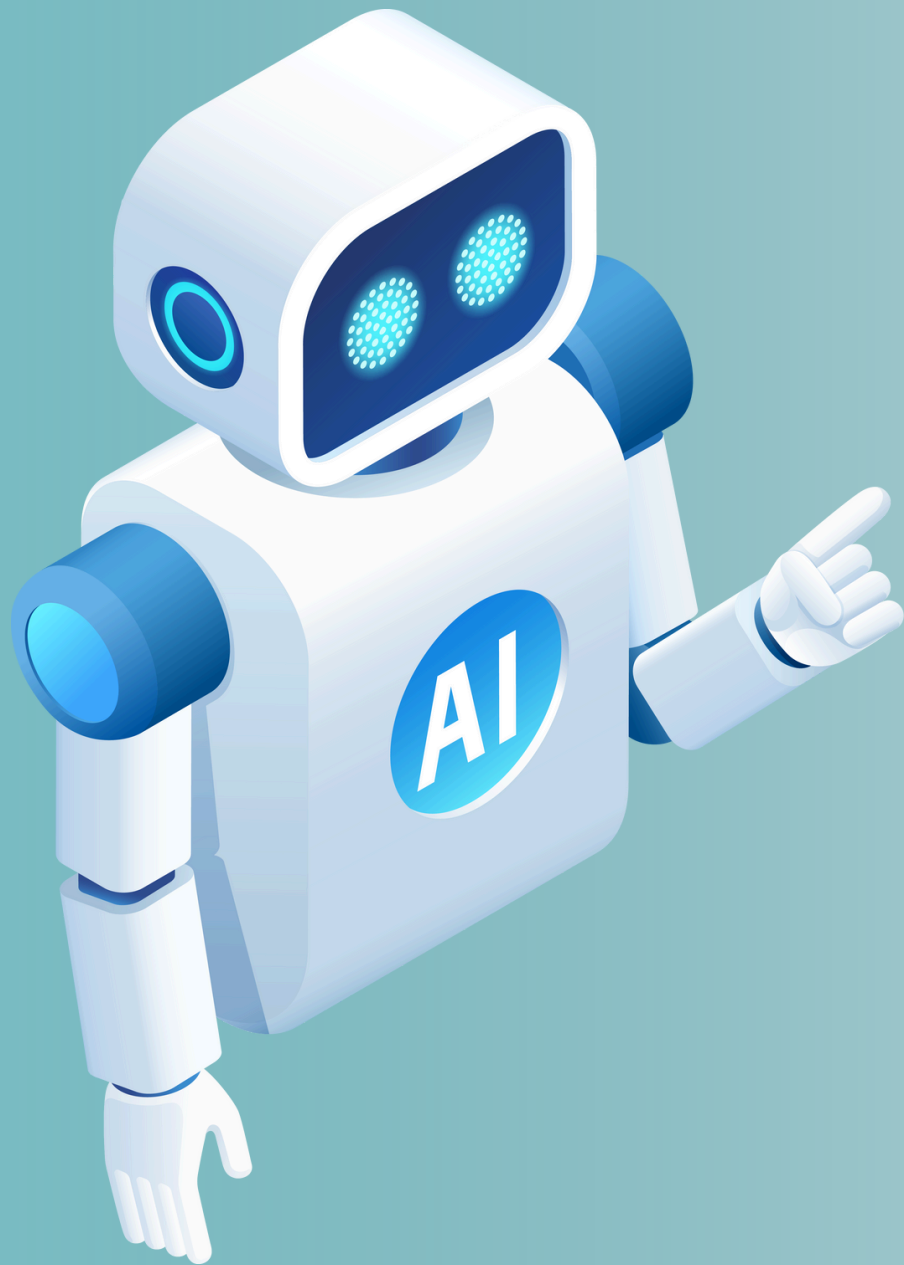
01. Taiwan's EdTech Market Overview and Trends



Understanding the current education market industry trends and potential is essential in order to create better EdTech solutions and investment decisions that align with market demand



AI ACCELERATES EDTECH'S APPLICATIONS



- FindIT platform analysis (2024): As distance learning enthusiasm cools, investor focus shifts to generative AI. EdTech investment expected to rebound in 2024.
- 2025 Taiwan EdTech Expo survey (n=905): Over 50% recognize AI optimizes teaching and learning effectiveness and are willing to invest.

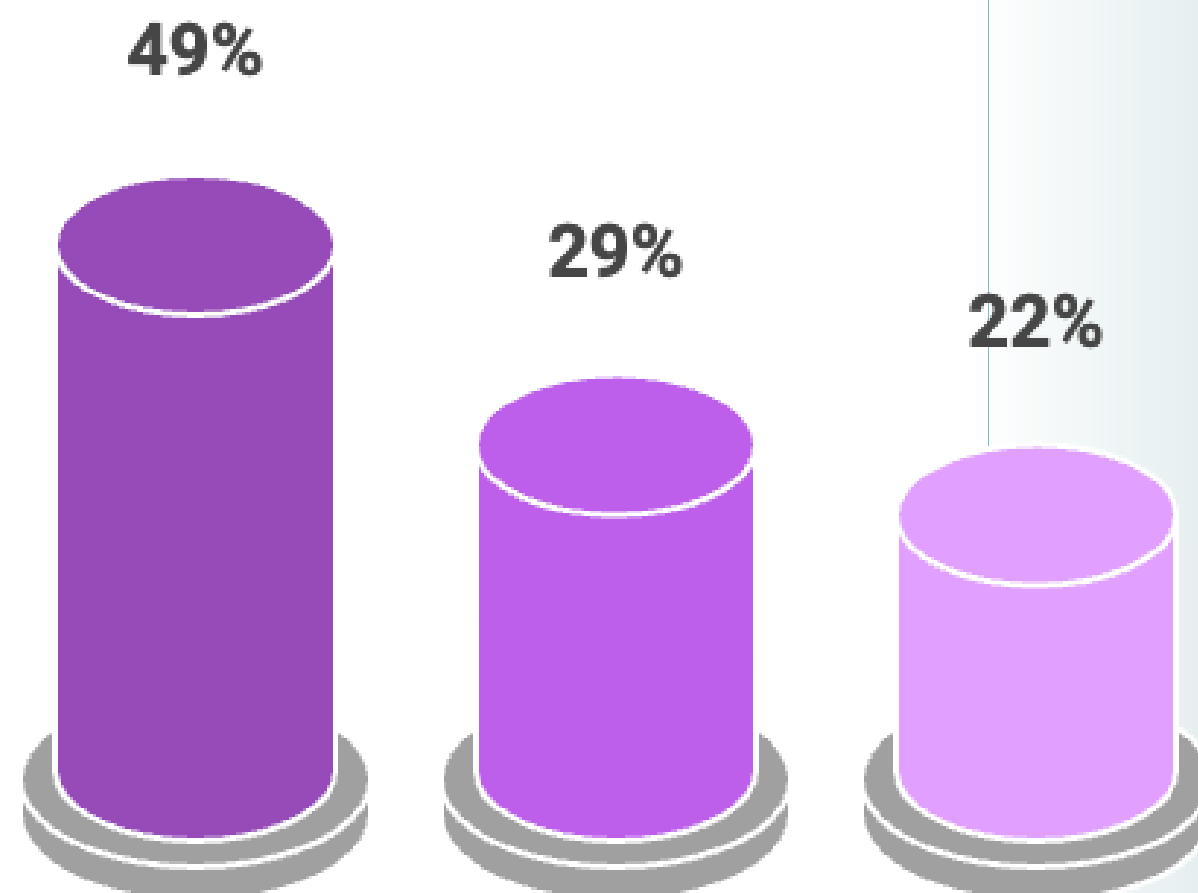
Highest acceptance among 36-55 year old decision-makers with higher education, who anticipate greater learning benefits from AI.

The EdTech Market is at the Intersection of Recovery and Acceleration Led by the Rise of AI



2024 SMART LEARNING MARKET STRUCTURE AND LANDSCAPE

Taiwan's smart learning industry leans toward a **mature market**. While entry barriers may be high for startups, there's an established industry structure and stable customer base to connect with.



longest established

20+ years

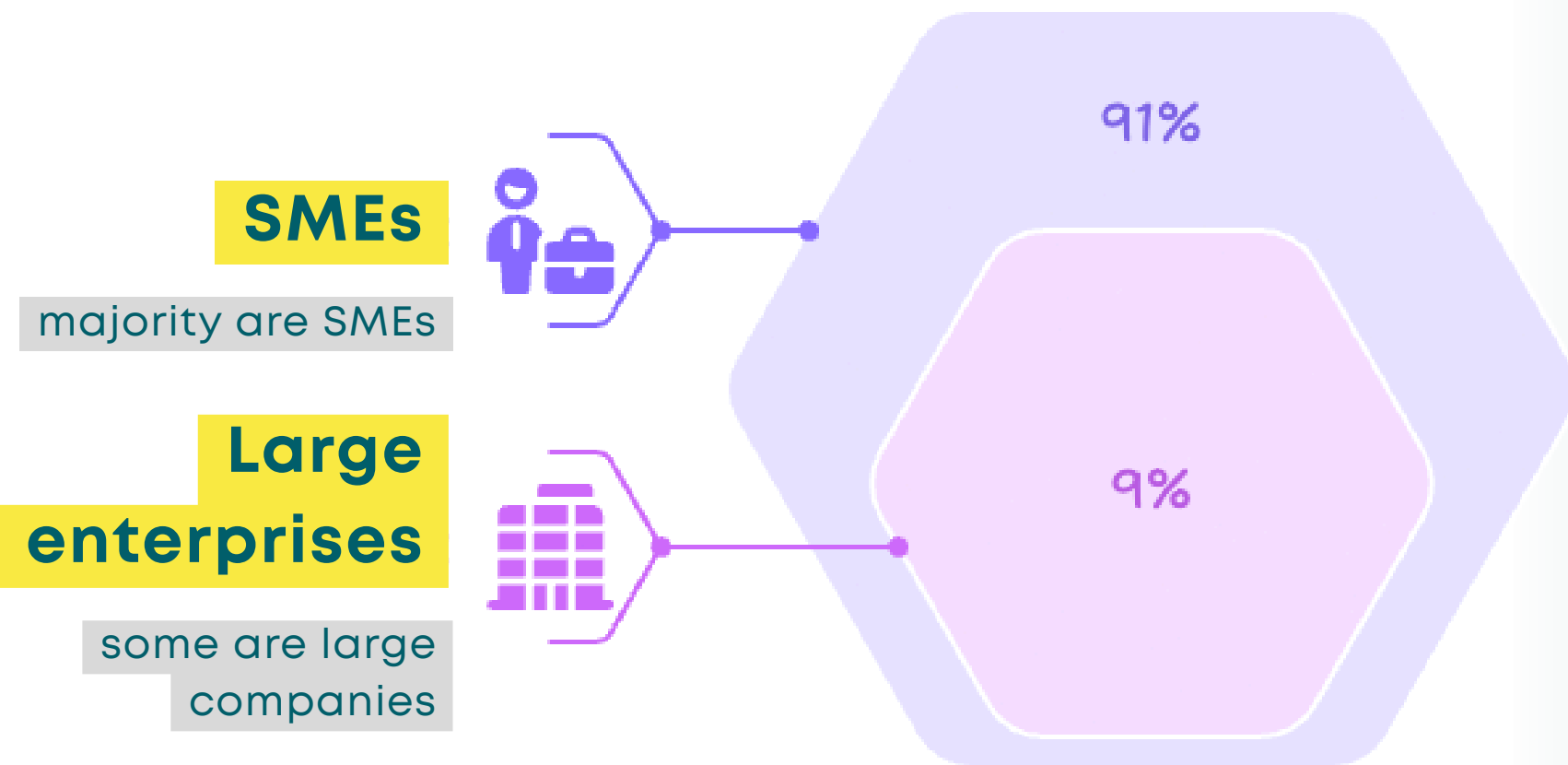
10-20 year

mid-tier

Within 10 years

newest

Older companies initially engaged in publishing and education software, then expanded to smart learning.



Small Capital Enterprises Rising, Market More Diversified

Most players are SMEs with limited resources, highly sensitive to implementation effectiveness and practical products.

However, rising small capital enterprises show the EdTech market is gradually opening to **micro-entrepreneurs and personal brands** (influencer teachers, self-media instructors, new content creators).

SMART LEARNING BUSINESS SCALE CLASSIFICATION IN 2024

Source: Ministry of Digital Affairs (MODA), Taiwan



Taiwan's intelligent learning industry is **dominated by SMEs** and established companies at a critical stage of digital transformation. Meanwhile, startups and personal education brands are rapidly rising, addressing market pain points.

EdTech Expo Taiwan should not only be a product showcase but also a convergence point **for 'established companies seeking transformation' and 'startups bringing innovation' to dialogue and collaborate.**

**Connect Veteran Experience with New Solutions to
Create the New Future of EdTech**

選出哪個選項沒有錯字?

【小組派代表，計時三十秒】

1故步自封

2追根空抵

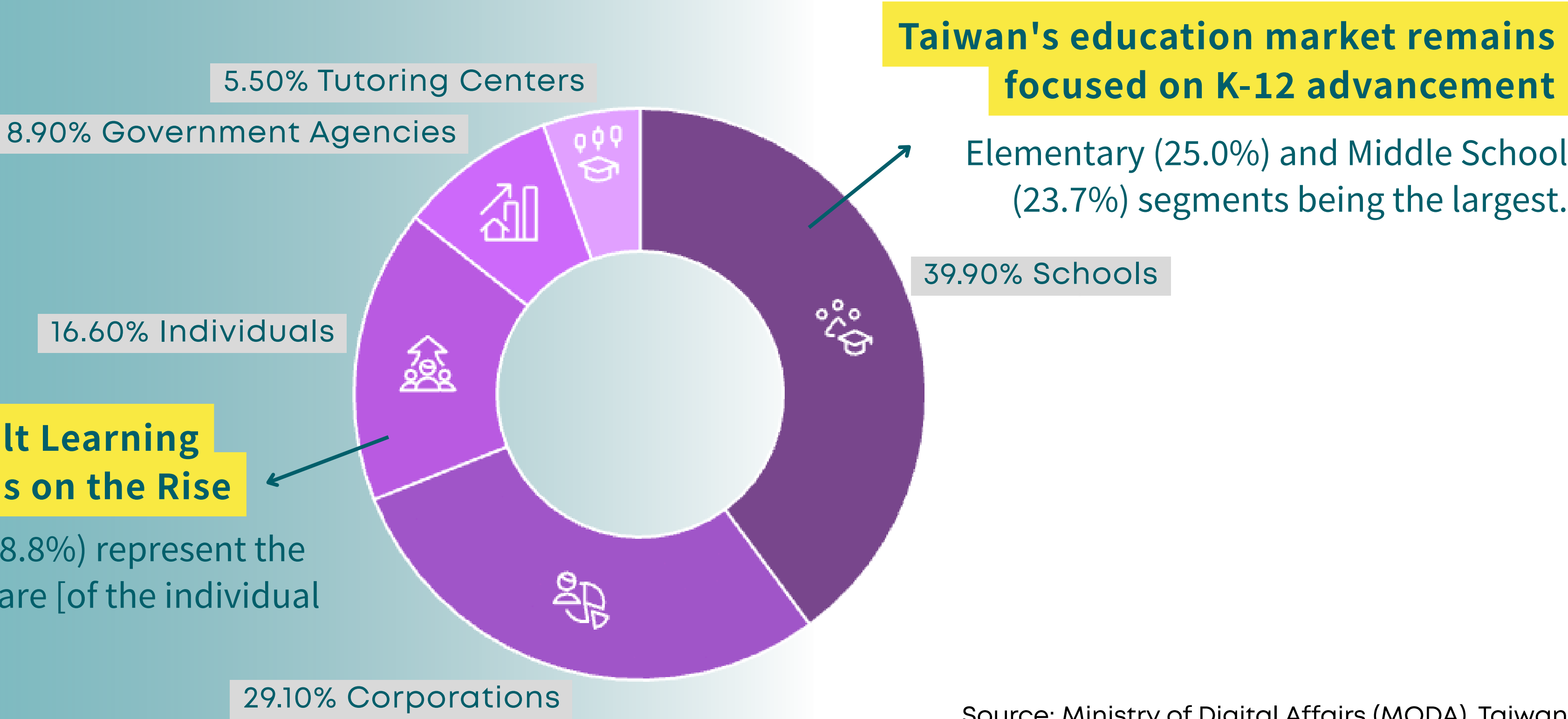
單選 14/50 28% 00:19

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15	16	17	18	19	20	21	22	23	24	25	26	27	28

02.Taiwan's EdTech Market Challenges & Opportunities

Through analyzing market structure, user needs, and application barriers, revealing key industry challenges while identifying future growth drivers and potential breakthroughs.

2024 CUSTOMER SEGMENT ANALYSIS



POTENTIAL PAIN POINTS

- While schools (especially K-12) remain the largest revenue source, **a significant gap in digital literacy and teacher support** prevents new tools from being effectively integrated into daily instruction
- Government procurement demand is growing (+3.7% annually), but complex processes and opaque bidding mechanisms deter many vendors. . The industry **lacks an effective channel to align with government policy**
- **The individual learning market is saturated** with content but suffers from a "trust deficit." It's highly competitive, yet companies struggle with brand differentiation and clear learning strategies, resulting in low conversion rates.



Addressing Market Pain Points: The EdTech Exhibition Creates On-Site Solutions by Connecting Decision-Makers, Educators, and Government



EdTech Expo Main Forum

Struggling to enter the education market or navigate complex government contracts? The expo creates a dedicated space for dialogue with school and government decision-makers (e.g., Ministry of Education, local education bureaus), fostering trust and facilitating pilot programs.



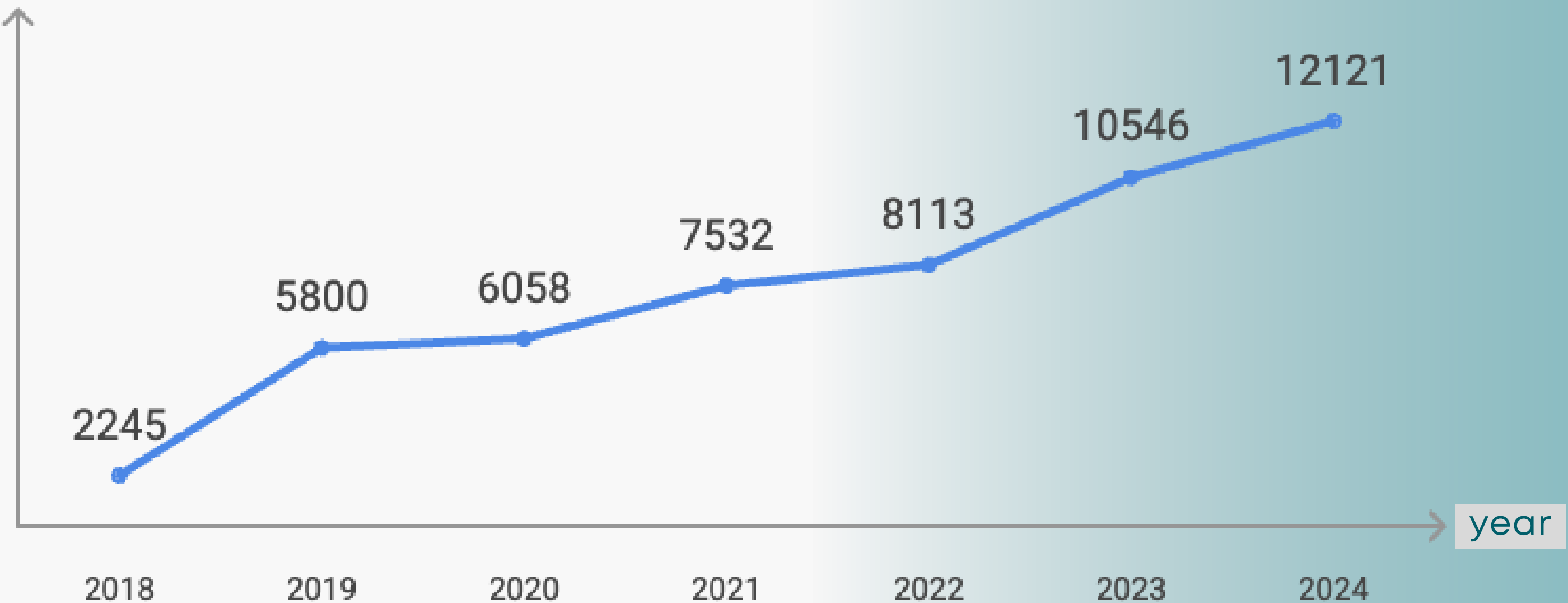
Teaching Case Study

Want to break into the K-12 market and drive digitalization in schools? The expo features participation from over 200 schools and attracted 12,121 educators for certification, demonstrating high teacher engagement and strong demand for professional solutions.

Why EdTech Taiwan EXPO?

Educator Attendance: A 5-Fold Growth in 6 Years

number of attendees



Educator Attendance at the EdTech Exhibition (2018-2024)

Attending Educators = EdTech Advocates

The educator certification program is exclusive to current teachers and education professionals. This means the 12,121 participants in 2024 primarily came from:

- current school teachers
- School administrators or decision-makers (e.g., team leaders, directors, principals)
- Education bureaus, Ministry of Education-related units, or instructional coaches

Understanding the pain points and goals of education professionals is the key to rapidly building trust and is the core strategy for successful product adoption and scaling

New Opportunities in the EdTech Market



The Trend of Lifelong Learning is Here

Taiwan EdTech Expo enables exhibitors to expand beyond traditional campuses, charting a new territory in EdTech that spans from family and adult learning to senior education.

WHO IS THE CUSTOMER? A GREAT PRODUCT IS HARD TO IMPLEMENT IF IT DOESN'T MEET THE RIGHT NEEDS

Even with clear market trends and a well-curated exhibition, true adoption of EdTech (getting it "in use") still depends on:

- Whether teachers understand the tool's value and can integrate it into daily instruction.
- Whether administrators can align the procurement and implementation process with policy and school development goals.

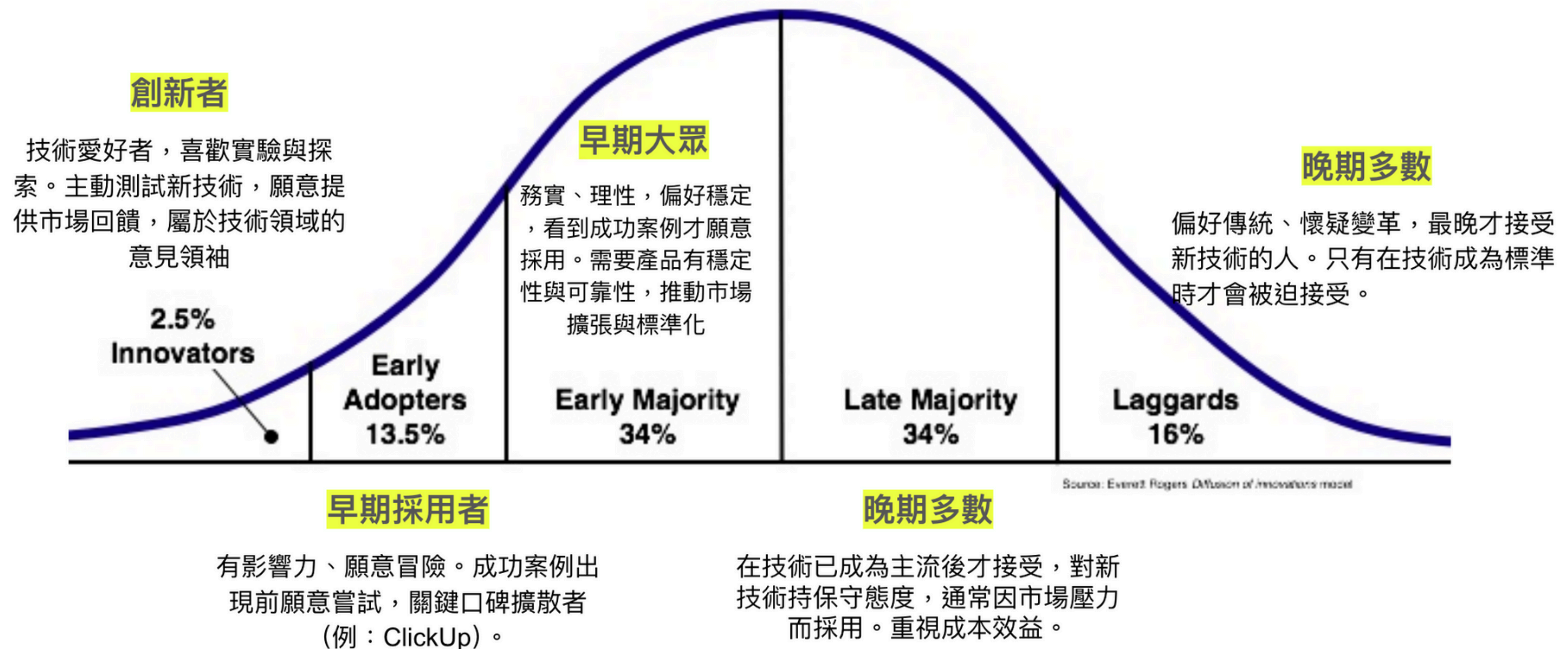
Behind every user lies a different mindset, user behavior, and decision-making process



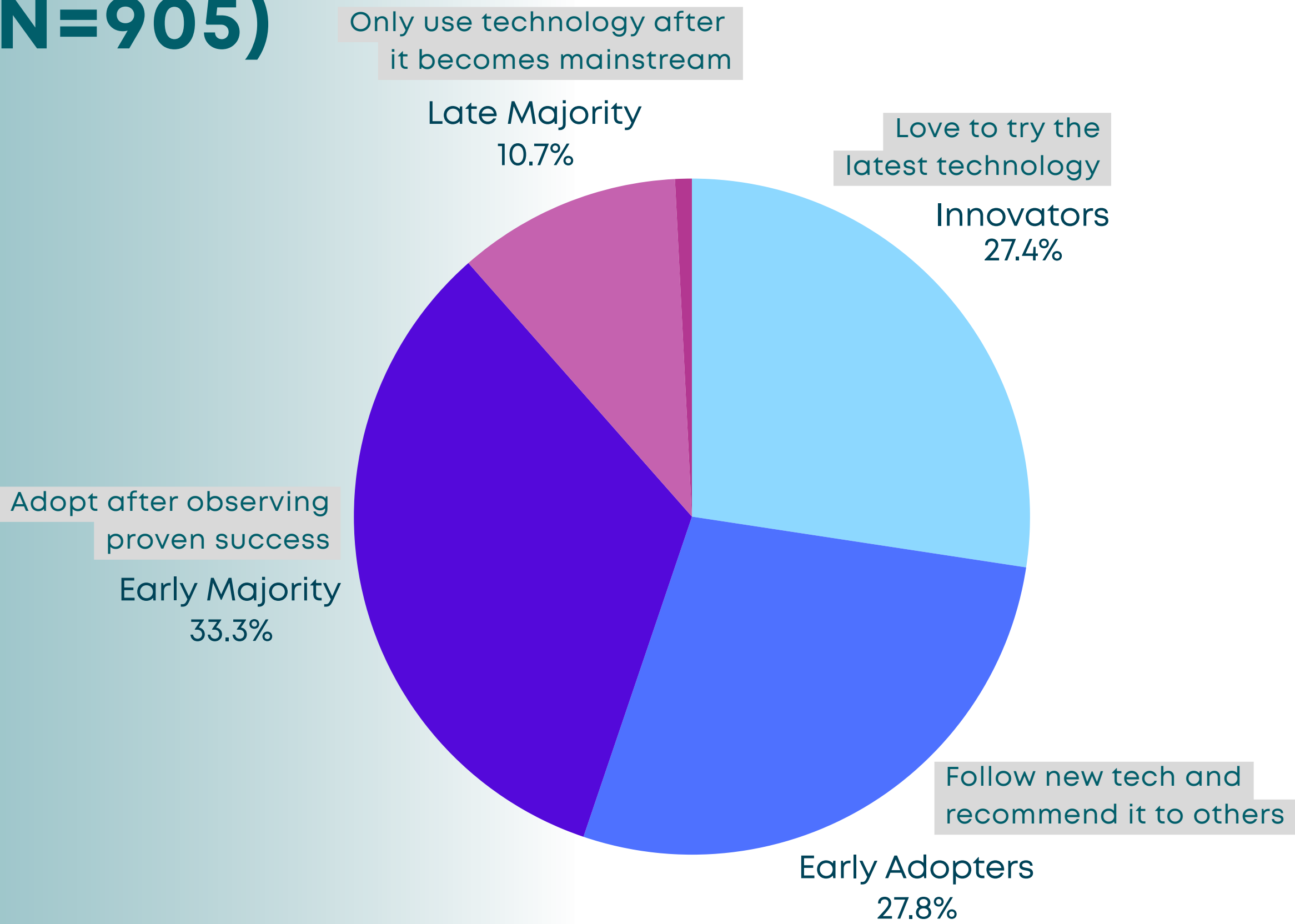
03. 2025 Market Research Report: EdTech TW Audience Profile

We aim to comprehensively understand market structure, trends, and potential opportunities through in-depth data collection and analysis, all while validating customer needs

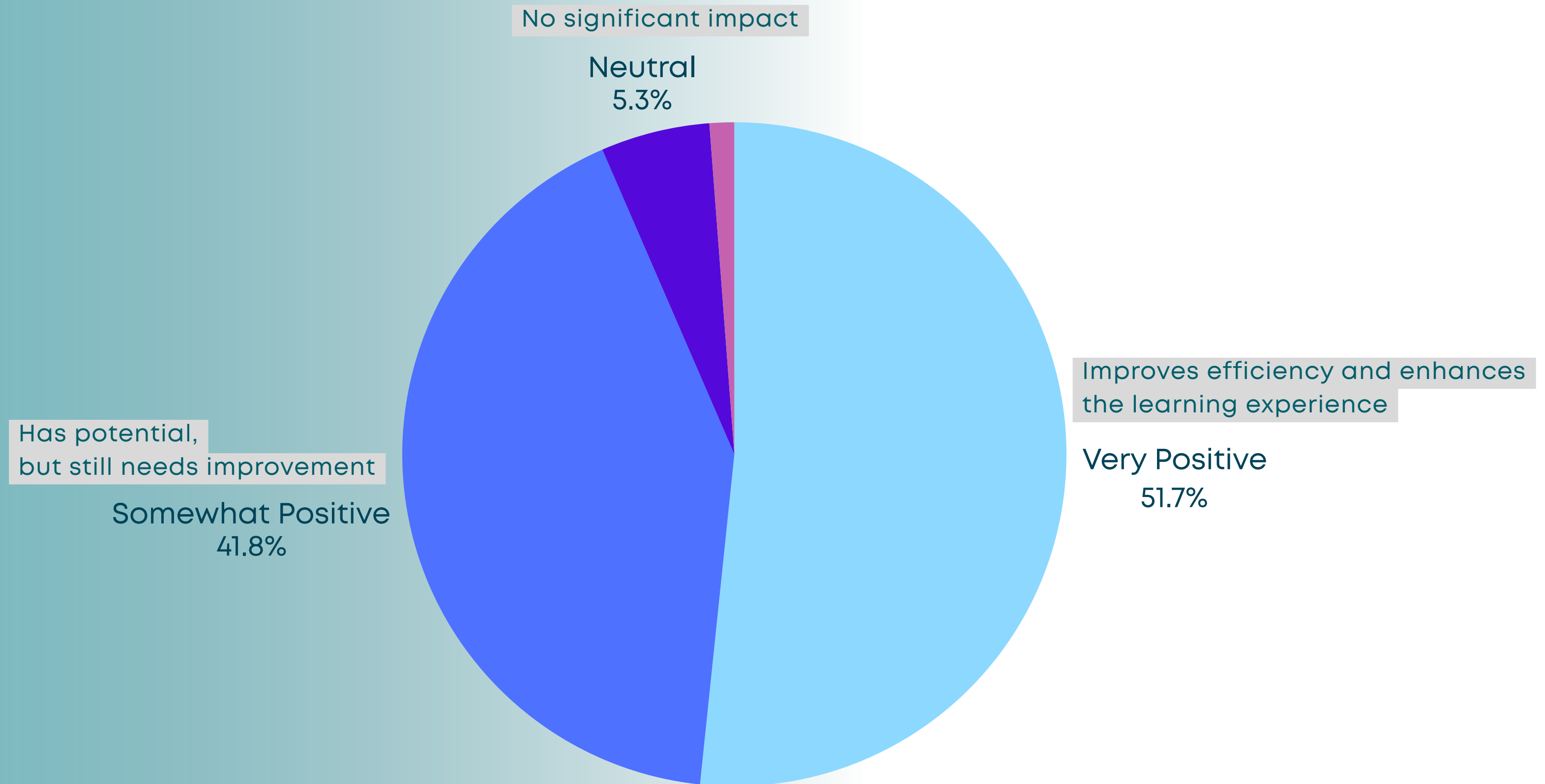
HOW TO DEFINE TECH USERS? (TECHNOLOGY ADOPTION CURVE)



AUDIENCE ATTITUDE TOWARD EDTECH ADOPTION (N=905)



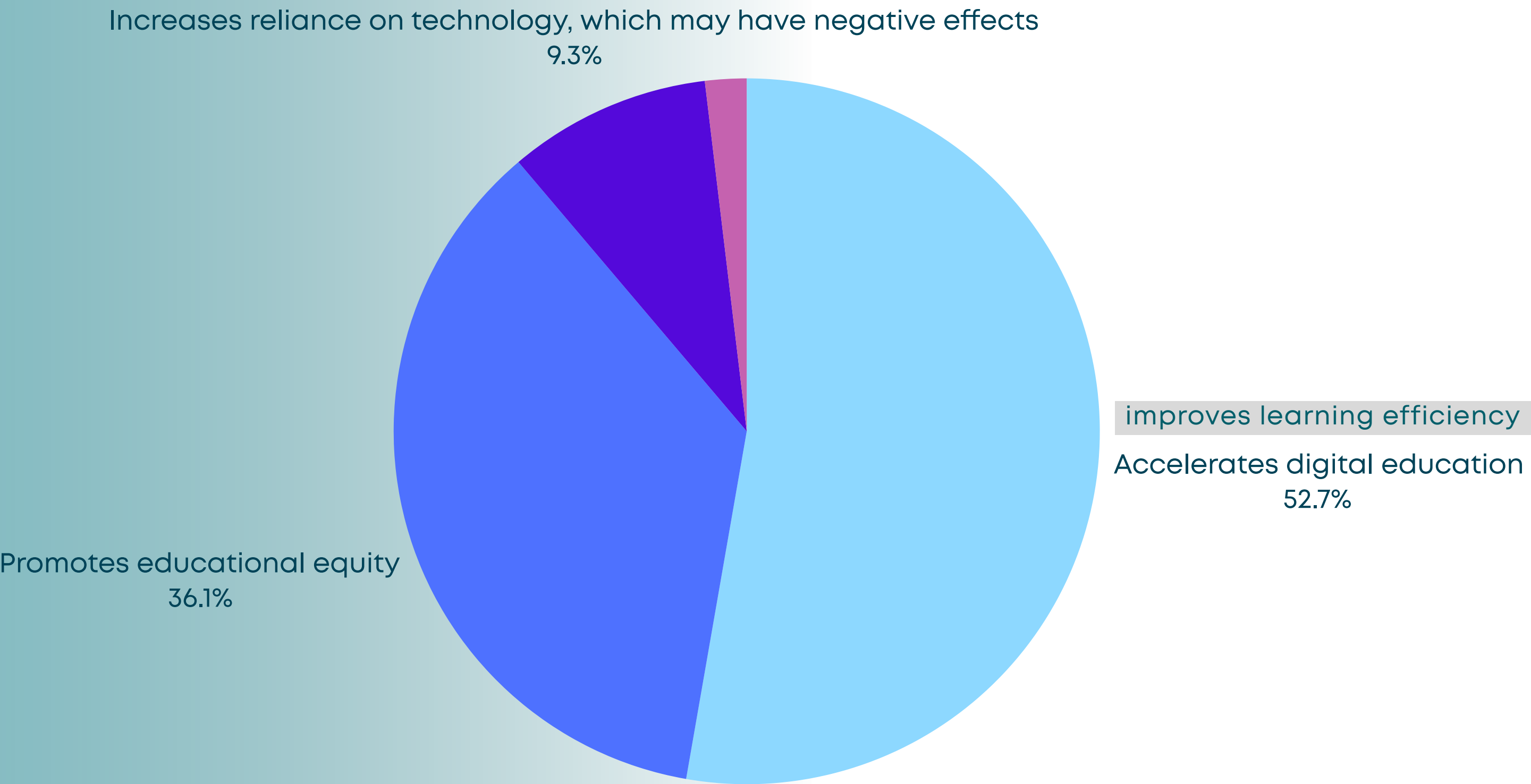
HOW DOES EDTECH IMPACT YOUR WORK?



EXHIBITION METHODS THAT BEST MEET THE TARGET AUDIENCE'S NEEDS



WHAT IS THE AUDIENCE'S PERCEPTION OF EDTECH'S IMPACT ON SOCIETY?



EDTECH IS THE ENTRY POINT FOR IMPROVING EDUCATION QUALITY

- **~55% Early Adopters + Innovators** → Willing to try new things and drive word-of-mouth. Ideal for product testing and co-creation
- **~33% Early Majority** → Need success stories and proof of stability. Vendors must build community by showcasing real-world use cases, KPI data, and user testimonials.
- **Over 50% of the audience believes EdTech can enhance and improve the learning experience** → EdTech is no longer an option, it's a necessity.
- **Over 50% of the audience believes EdTech accelerates digitalization and improves efficiency** → EdTech is the core engine of digital transformation.

Over 50% view EdTech as "Very Positive": improving efficiency and enhancing the learning experience. Vendors who provide AI-driven, smart, and personalized features will see high adoption rates.



04. Audience Personas & Strategies



Uncover trends and latent needs to inform EdTech strategy, empowering vendors to seize opportunities with precision

From Product-Centric to Human-Centric: Personas

To more accurately connect exhibition design, vendor strategies, and practical EdTech applications, we have established the following two core market personas based on survey data (N=905), organizational structure, and exhibition observations:

- **Teacher Group (2 Personas):** Core users with diverse roles, reflecting the practical gaps in real-world implementation
- **Education Administrators (1 Persona):** School decision-makers and resource allocators, influencing policy adoption and internal promotion



Education Administrator

Director Lee

Proactive & Cautious Leader

Age/Sex: 46-55, female

Title: Academic Director/Leader

School Type: Public middle/high school, ~600-1000 students

Education: Master's degree or higher

Tech Adoption: "Early Majority" - willing to try, but cautious about practical implementation

GOALS & MOTIVATIONS

- Improve administrative efficiency and reduce workload
- Promote school-wide digital transformation, aligning with Ministry of Education policies and grant programs.
- Increase teacher acceptance and participation in EdTech.

CHALLENGES

- **Internal Limits:** Restricted use of LMS/SIS, inconsistent tool usage across departments, and insufficient IT support
- **Policy Barriers:** Difficulty finding ideal, policy-compliant solutions with proven case studies (e.g., LMS can't auto-sync with SIS, requiring redundant data entry).
- **Time Cost:** Complex administrative procedures (e.g., bidding, council meetings, teacher training).

BUDGET & PROCUREMENT HABITS

- Relies on government grants and school budget planning. Procurement is concentrated from June to September to align with the new school year's budget
- Will apply for policy-based grants to secure funding. Annual budget is approx. TWD 800k - 3M
- After internal review and grant approval, the official implementation decision is made. The entire process takes 4-8 months

HOW DOES DIRECTOR LEE EVALUATE EDTECH PRODUCTS?

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How can you help Director Lee?

Provide practical, "Policy-Aligned" solutions: Offer products that meet policy requirements (e.g., Smart Learning Advancement Project) or teaching bundles (e.g., integrated MDM, Smart Learning Platforms)

Emphasize "On-the-Ground Implementation Support": Provide teacher training, technical assistance, and educational resource integration

Focus on "Efficiency Gains & Integration Cases": Use "workload reduction" and "process simplification" as the main marketing levers

Set up interactive booth activities at the EdTech Expo: Allow Director Lee to "see it, "use it," and "leave with a story."

Traditional vendors all talk about "how powerful their features are," but Director Lee's real pain point is "workload."

Ms. Yang

Proactive & Integrative Teacher

- **Age/Sex:** 36-45, female
- **Title:** Subject teacher
- **Education:** Master's degree or higher, 8-12 years of experience
- **Tech Adoption:** "Early Adopter."
Follows new tech trends and enjoys sharing and recommending them

GOALS & MOTIVATIONS

- Transform teaching with effective tools to improve student engagement and outcomes
- Find practical, verifiable, and shareable teaching platforms or tools
- Hopes the tool can integrate with existing workflows (e.g., homework, grading) to avoid redundant entry and improve teaching efficiency
- Cultivate students' digital literacy and self-directed learning

CHALLENGES

- Difficult to connect teaching materials and tools; requires significant time to switch formats.
- Inconsistent account management across different platforms, impacting teaching flow.
- Varying student digital abilities, affecting the consistency of tech-based instruction.
- Old school hardware and unstable networks, creating obstacles to ideal implementation.

BUDGET & PROCUREMENT HABITS

- Actively seeks progressive tools that can optimize existing workflows
- **Will use free trials first.** Prefers to apply for payment through administrative process only after confirming effectiveness
- **Values long-term utility**



How can you help Ms. Yang?

Provide tool demos that are "structured, case-based, and ready-to-use": Show how curriculum design can be freed from fixed modules (e.g., video, interaction, tracking) and how it seamlessly integrates with existing LMS or teaching habits (e.g., module demo zones, school usage case studies)

Emphasize differentiated instruction strategies: Show how to implement personalized learning, including student grouping, task-based modules, learning path tracking, and personalized feedback

Clearly demonstrate how the product solves problems: Start from the pain point, move to the solution, and pair it with practical classroom cases so teachers can immediately visualize the use case (e.g., teacher resource packs, open-house demo templates)

Ms. Yang wants to find practical, ready-to-use, flexible, and low-burden tools in her case studies to create her own unique teaching plan



Teacher Persona (2)

Mrs. Lin

Practical & Stable teacher

- **Age/Sex:** 36-55, high school female teacher
- **Title:** Homeroom/Subject Teacher
- **Education:** Bachelor's degree, 15-25 years of experience. Experienced, but doesn't actively pursue new digital tools.
- **Tech Adoption:** "Early Majority." Adopts only after observing that a tool is mature and has been vetted by peers.

BUDGET & PROCUREMENT HABITS

- **Prefers all-in-one solutions with a proven track record of success**
- Willing to propose a budget, provided it reduces the barriers to entry and her administrative burden

GOALS & MOTIVATIONS

- Find teaching tools that are **immediately usable and reduce prep burden**
- **Prefers not to drastically change existing teaching methods**; seeks assistance and optimization
- Hopes tech can **enhance student engagement and classroom interaction**
- **Expects tools to be adopted for collaborative use**, reducing the uncertainty of using them alone

CHALLENGES

- Worries that learning new tools will **take too much prep time**
- Teaching environments and tools are often unreliable (e.g., poor network, system incompatibility, lack of training and support)
- Has tried new tech before but **lacks confidence and motivation after experiencing setbacks**

How can you help Mrs. Lin?

Provide "seamless teaching logic" use cases: How was the lesson originally taught? → What's different after implementation? → What changes for the student? Show that the tool can be directly overlaid on existing curriculum frameworks without extra switching or redesign

Emphasize an "integrated, ready-to-use" platform: Present the structural framework using "integration flowcharts" and stress deep integration with school systems (e.g., SIS / LMS)

Attach workbooks or templates to lower the barrier to entry: Showcase actual lesson plan examples, teaching scenario videos, or provide teacher-facing "getting started" kits to build trust

Mrs. Lin wants to find practical, ready-to-use, flexible, and low-burden tools in her case studies to create her own unique teaching plan

[3 DIRECTIONS] × [3 ROLES] × [EDTECH EXHIBITION]



Market Perspective: The education market is currently at the intersection of AI technology and digital transformation, seeing a resurgence in both investment and demand

User Perspective: Educator attendance at EdTech Expo Taiwan has reached a record high, marking a critical window for product adoption

Design Perspective: EdTech Expo is not merely a product showcase, but an actionable hub that connects decision-making, instruction, and promotion

EdTech Expo is more than just a trade show—it is a unique opportunity to engage in dialogue, build trust, and co-create value with education decision-makers, teachers, and enterprises