

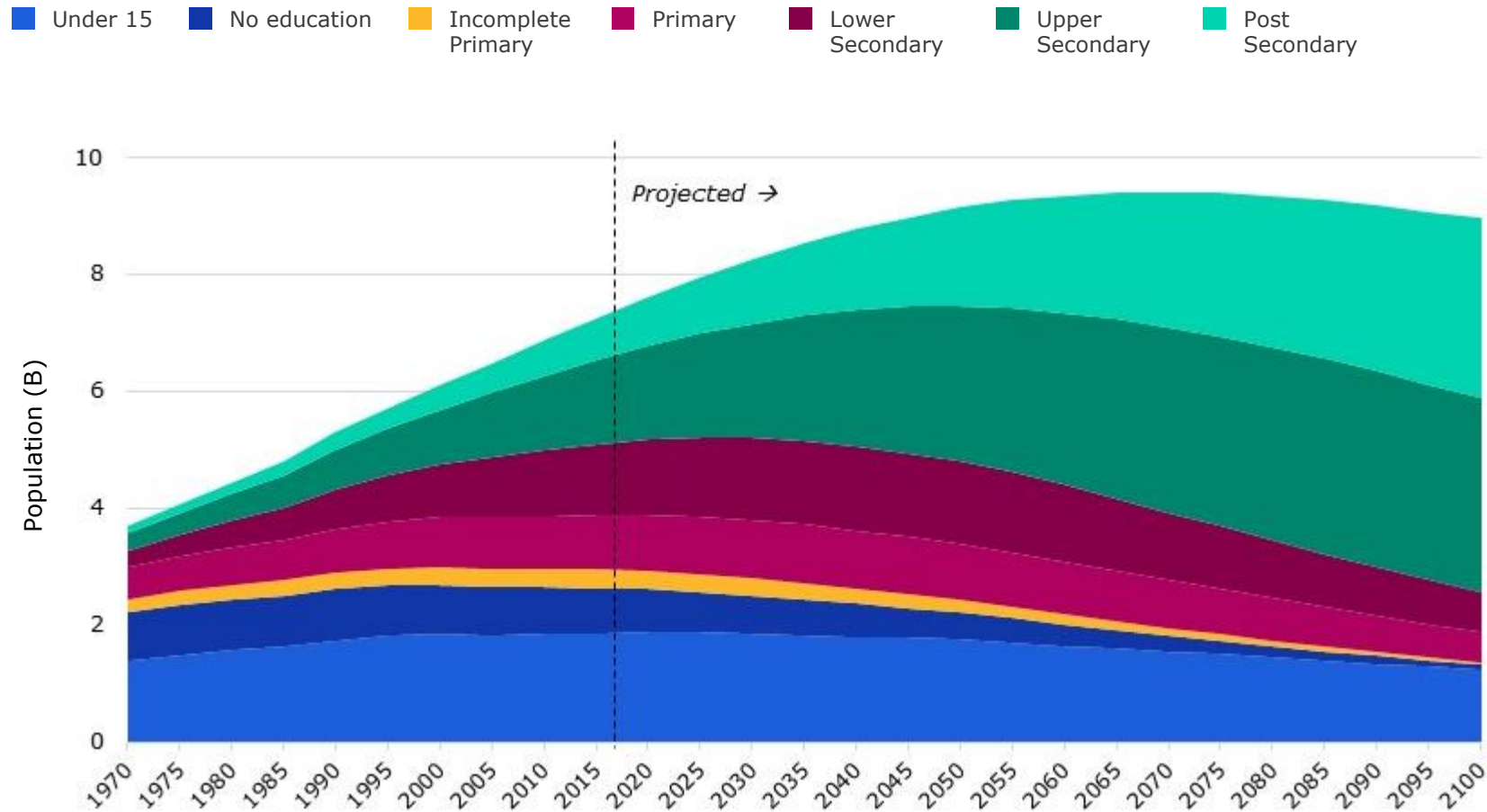
prosUS

Edtech Deep Dive

May 2022

Physical institutions of the west will not satisfy unprecedented demand for education globally, we need technology solutions

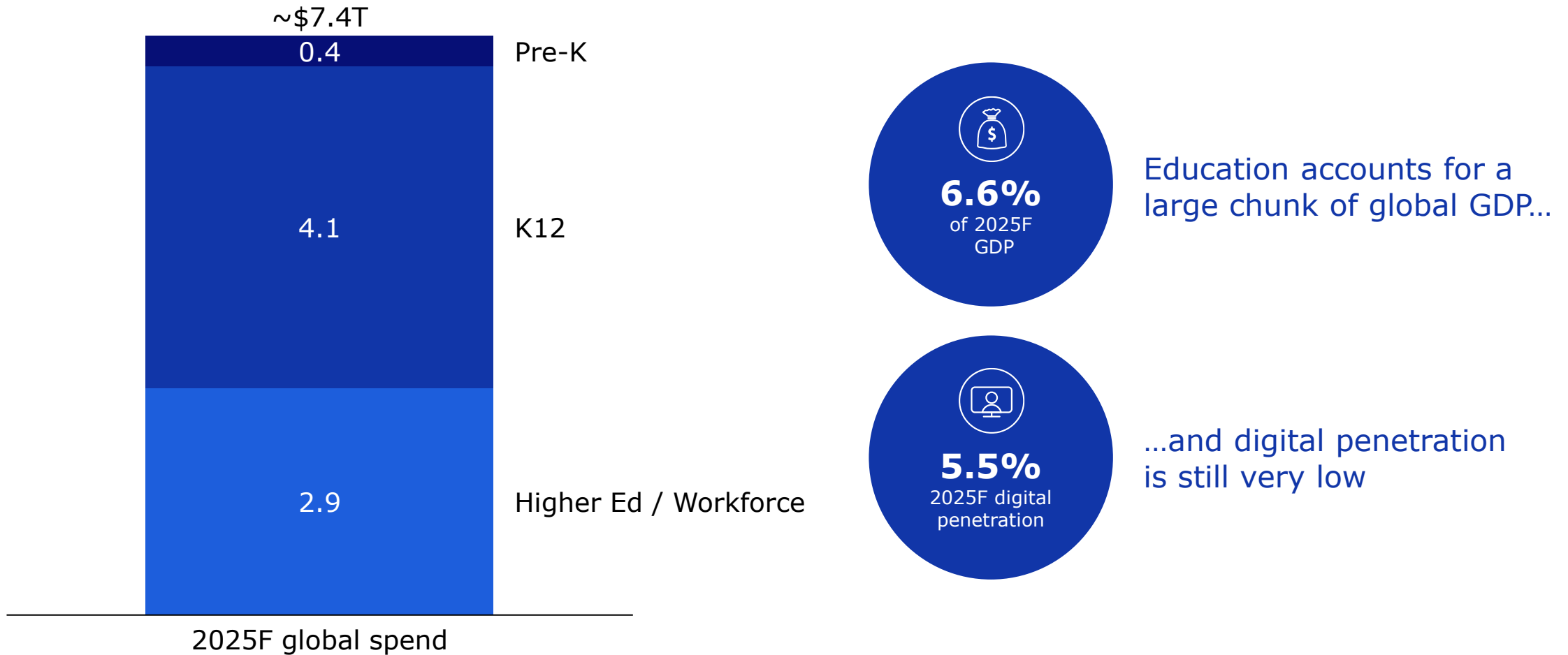
World Population by Education Level



- 1 Global population is growing, leading to higher number of K12 students
- 2 Students are achieving higher levels of education
- 3 Digital transformation requires up-skilling and re-skilling among already educated people













Global education spend is massive, and we are only in the early days of edtech adoption

Global Education Expenditure



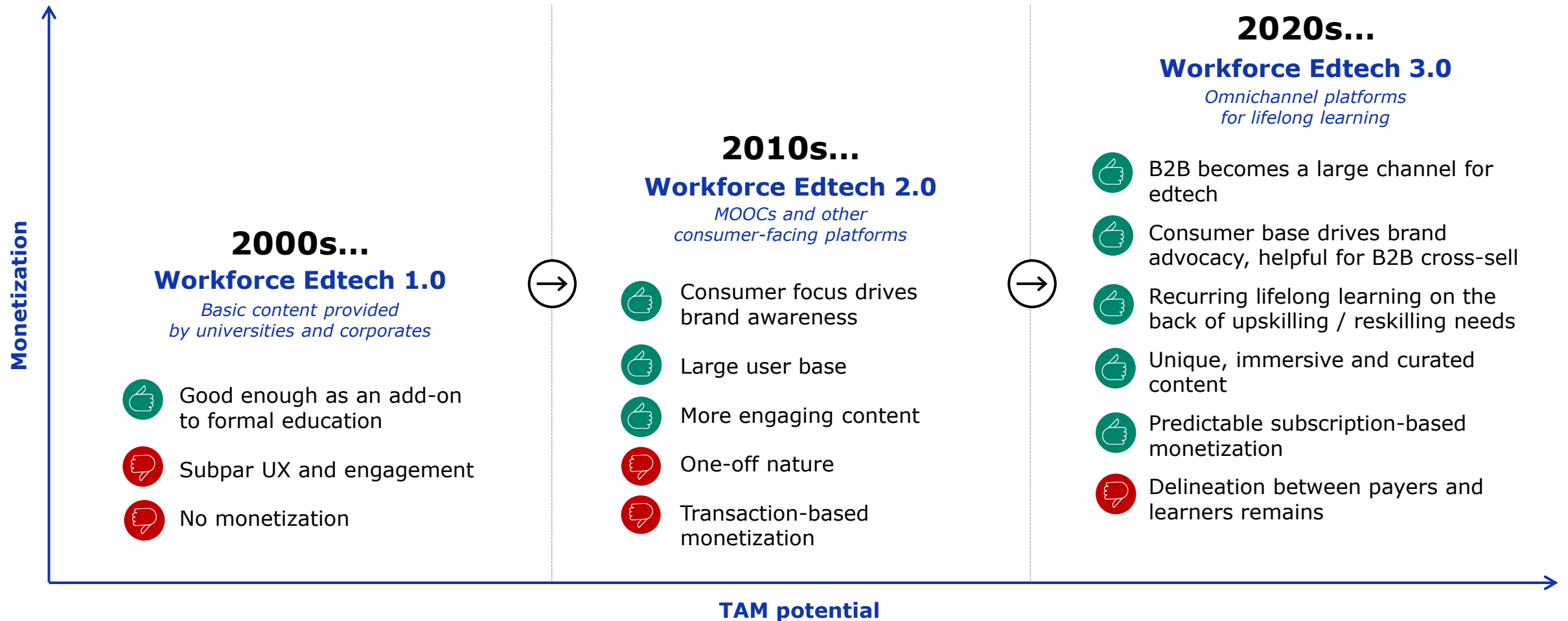
We are creating broad ecosystems in workforce/higher education & K12

US\$3.8bn+ invested in a portfolio of **12 companies*** across the globe

K12 education	Workforce/Higher education		
  	  	  	  

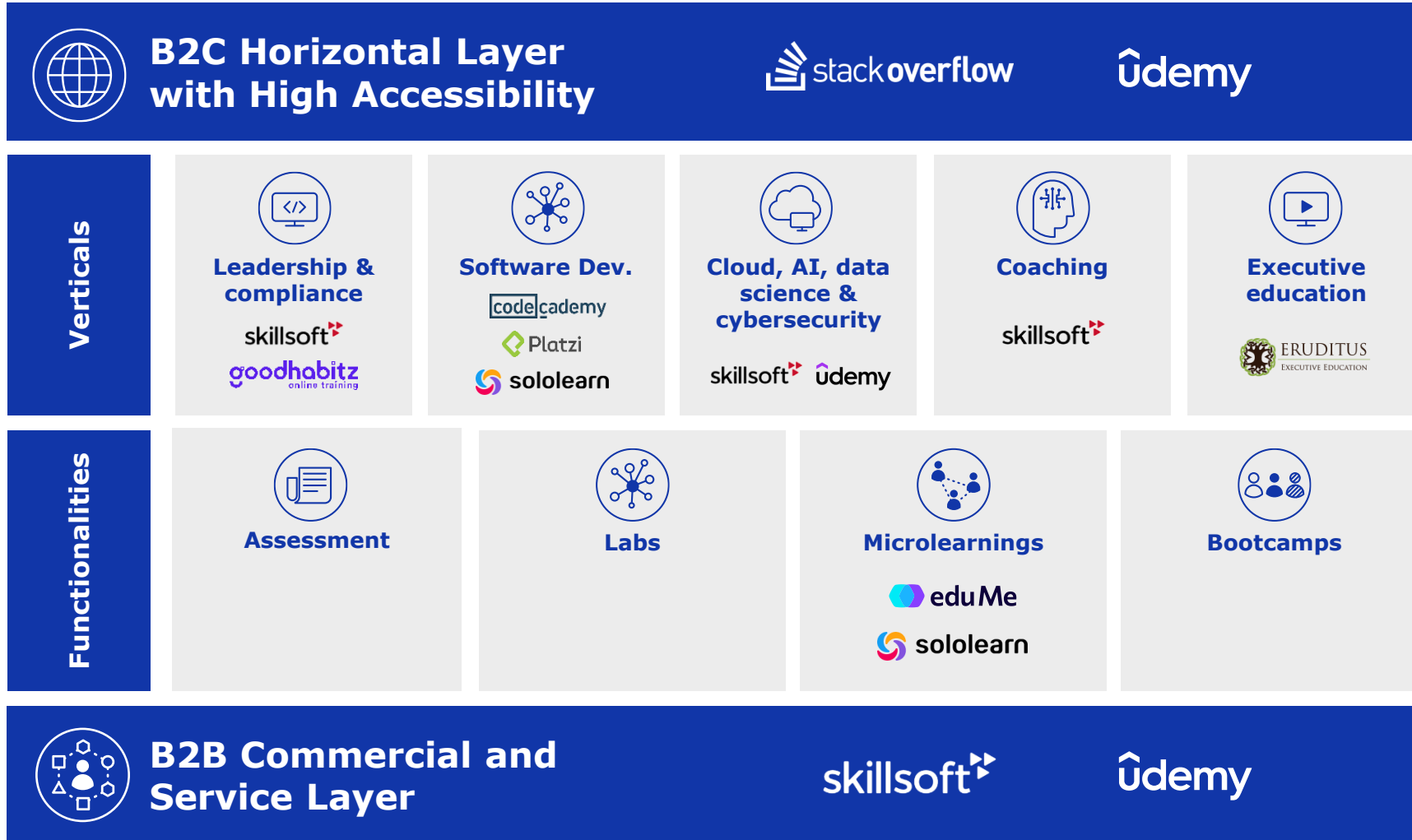
* Skillsoft completed its acquisition of Codecademy in April 2022

Workforce Edtech evolution



Workforce companies address corporate demand for training

Workforce Edtech Ecosystem



- **Organic B2C/P2P traffic**
- Global reach
- B2C promoters drive B2B sales

- **Monetization engines**

- Specialized content or enabling functionalities
- Known vertical brands
- Often struggling to enter B2B corporate sales or develop B2C organic traffic

- **Robust B2B client base**

- Strong sales & marketing capabilities
- Traffic sharing



Stack Overflow Overview



Stack Overflow is the largest global, technology-focused platform in the world.

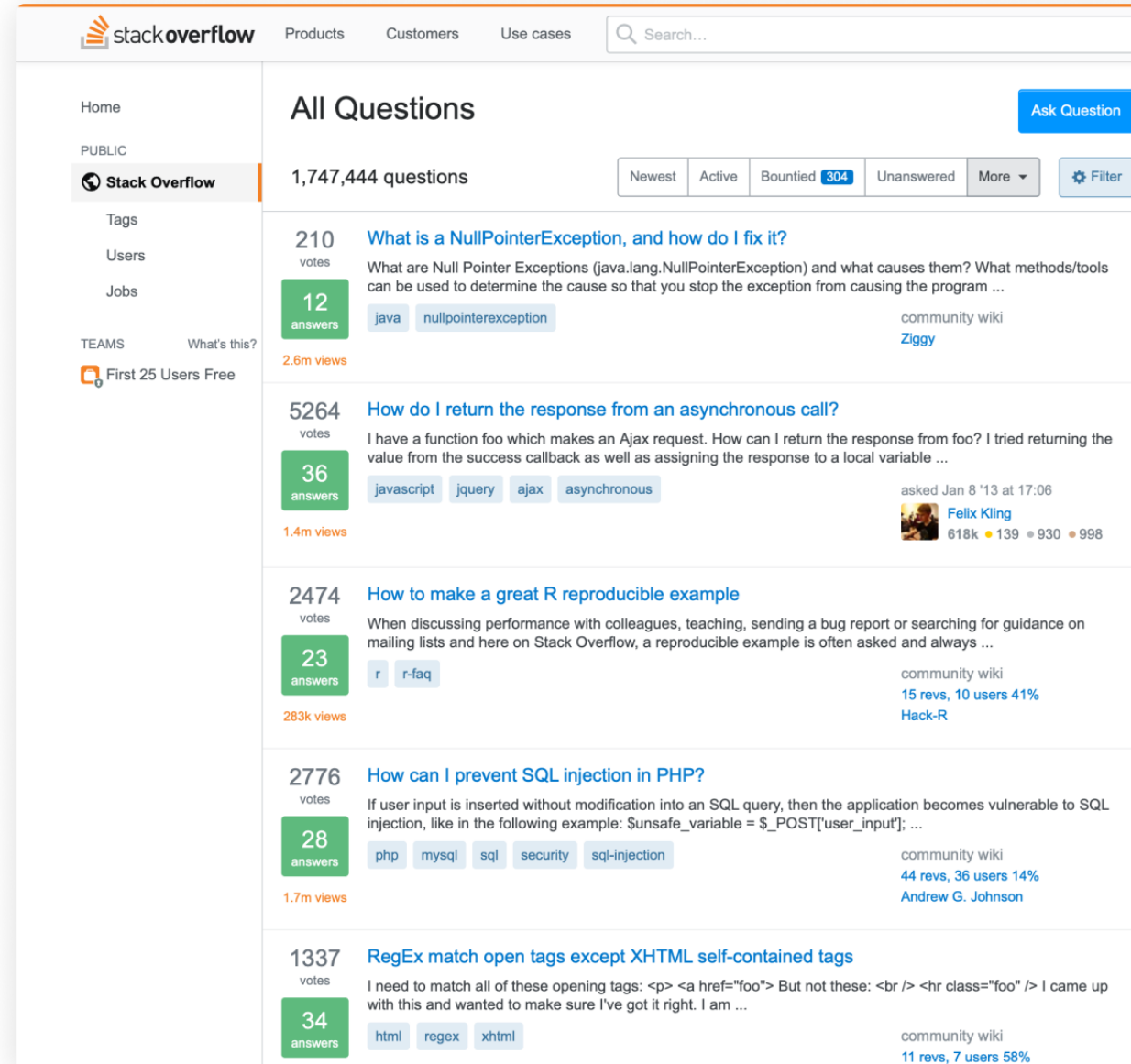
Our mission is to empower the world to develop technology through collective knowledge.



When developers have a coding problem, they head to **Stack Overflow**.

Because they know they'll find a solution.

- ✓ It's a **free** and **open** forum
- ✓ It hosts a **community-built** library of coding knowledge
- ✓ It's for beginner, expert and **professional developers**



The screenshot displays the Stack Overflow homepage. The top navigation bar includes the Stack Overflow logo, links for Products, Customers, and Use cases, and a search bar. The left sidebar shows navigation options: Home, PUBLIC (with Stack Overflow selected), Tags, Users, Jobs, TEAMS, and What's this? (with First 25 Users Free). The main content area is titled "All Questions" and shows 1,747,444 questions. A filter bar at the top right includes buttons for Newest, Active, Bountied (304), Unanswered, More, and Filter. The list of questions includes:

- 210 votes**, **12 answers**, **2.6m views**: "What is a NullPointerException, and how do I fix it?" (tags: java, nullpointerexception) by Ziggy.
- 5264 votes**, **36 answers**, **1.4m views**: "How do I return the response from an asynchronous call?" (tags: javascript, jquery, ajax, asynchronous) by Felix Kling.
- 2474 votes**, **23 answers**, **283k views**: "How to make a great R reproducible example" (tags: r, r-faq) by Hack-R.
- 2776 votes**, **28 answers**, **1.7m views**: "How can I prevent SQL injection in PHP?" (tags: php, mysql, sql, security, sql-injection) by Andrew G. Johnson.
- 1337 votes**, **34 answers**: "RegEx match open tags except XHTML self-contained tags" (tags: html, regex, xhtml) by community wiki.

Stack Overflow: Significant Scale & Competitive Moat

Massive global reach and impact on every technologist

100M+ Monthly Visitors

Incl. Stack Exchange (more than the NYT and Washington Post)

300K+ New Monthly Sign-ups

80% of the World's Developers

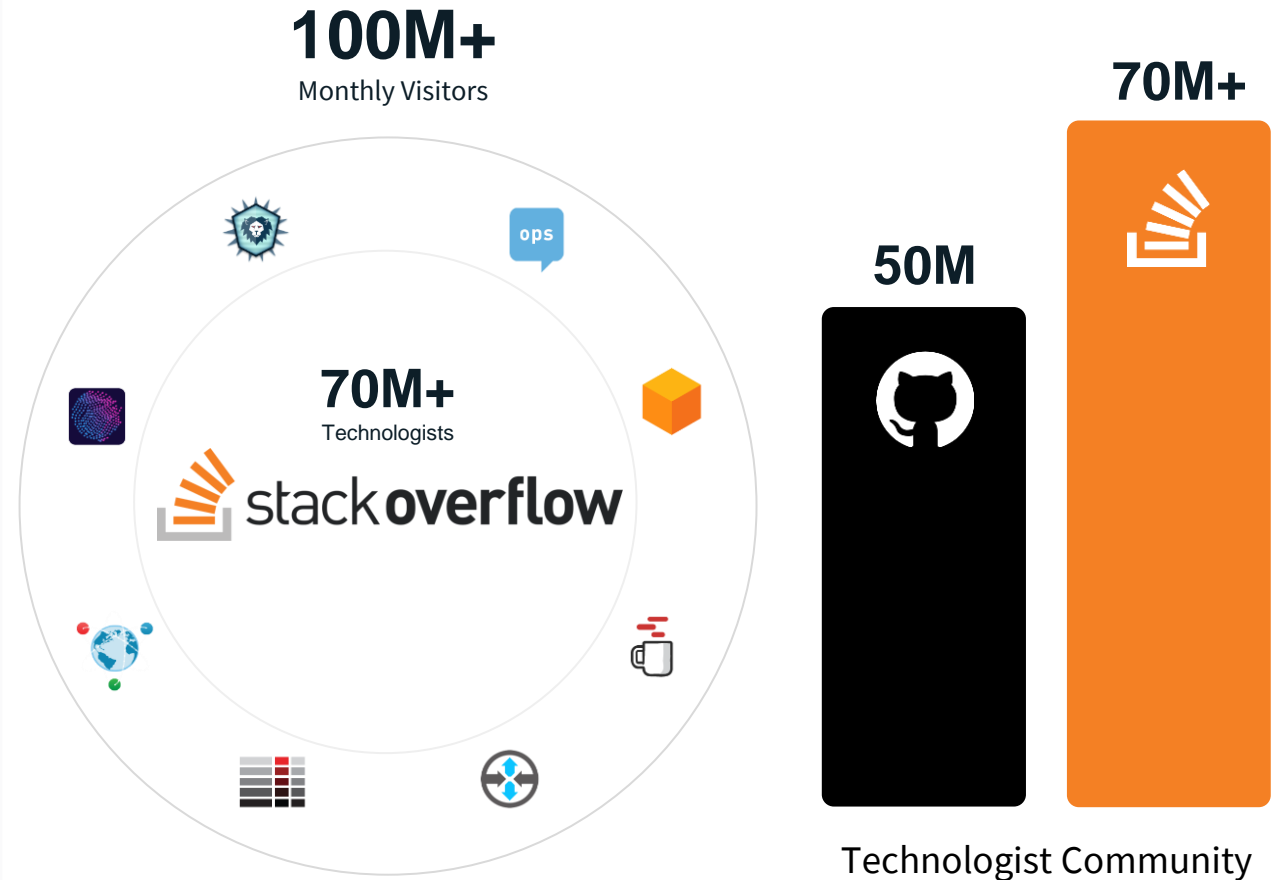
visit StackOverflow.com every **week**

~50M Questions & Answers

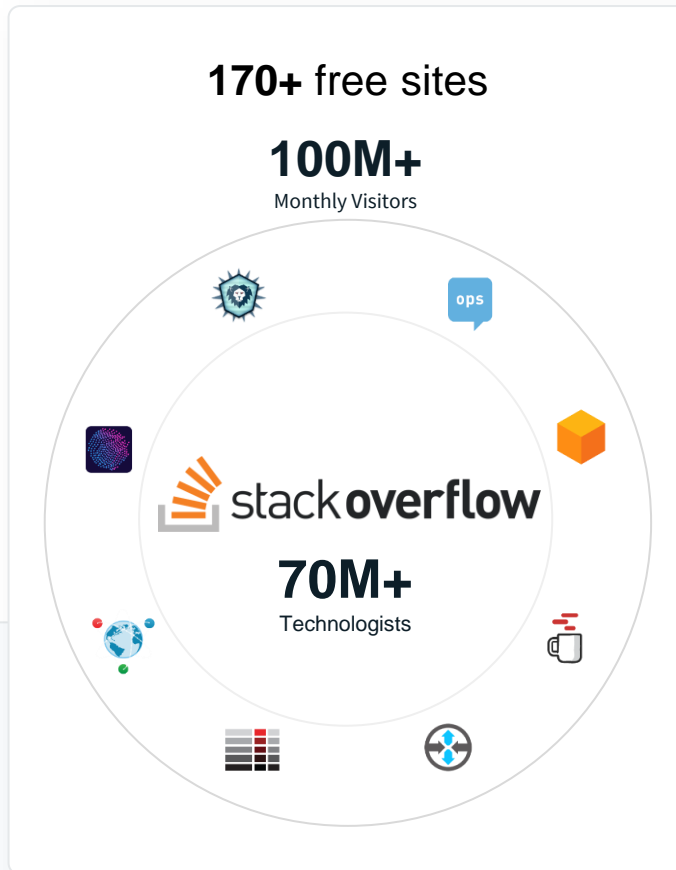
on Stack Overflow and Stack Exchange

Top 200 Website in the world

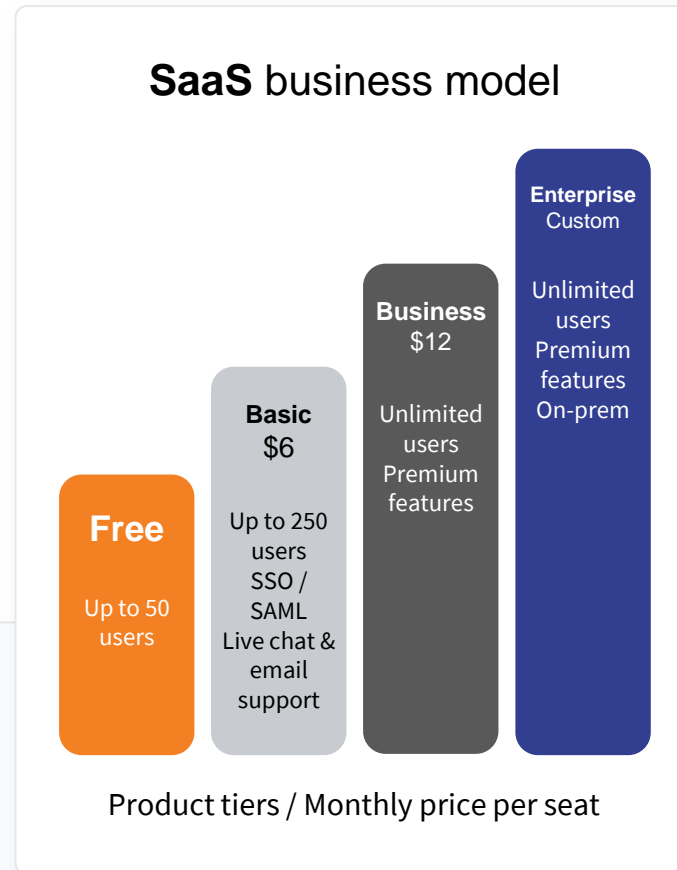
similarweb.com



Stack Overflow: Today's Products



 **COMMUNITY**



 **TEAMS**



 **REACH & RELEVANCE**

Stack Overflow: The Technologist's Learning Flow

All technical learning starts with a question on Stack Overflow.



Community



Collectives™



Teams

Learning about relevant technologies from leading companies.



Advertising

Learning about future employers.



Employer Branding

Learning through technology-specific sub-communities.

Learning through collaboration at work.

Stack Overflow for Teams (SaaS product)

Stack Overflow for Teams:



Addresses 3 Core Problems for CTOs/CIOs/Tech leaders



**Attract, onboard,
& retain top talent**



**Boost team
productivity &
collaboration**



**Accelerate
innovation**

Stack Overflow for Teams:

Key value drivers for developers and engineers



- ✓ Improved developer velocity and experience
- ✓ Provides instant access to expert, relevant knowledge
- ✓ Fast adoption with familiar UI & UX
- ✓ Reduce distractions from synchronous collaboration tools
- ✓ Break down silos between departments and geographies
- ✓ Accelerates ramp up time and upskilling of existing employees

The screenshot shows a Stack Overflow team page. On the left, there's a sidebar with navigation options: Questions, Articles, Collections, Tags, Users, and Dashboard. The main content area displays a question titled "How do I setup my local dev environment?". The question is marked as "Private Team" and has 20 answers. The top answer is by Phoebe Newnham, asking for an overview of building blocks and tools for non-Windows environments. The second answer is by Heike Ackermann, providing instructions for setting up a local development environment on MacOS and Linux, mentioning the use of a shell script called `setup.sh` and the need for PowerShell Core.

Stack Overflow for Teams: Massive Market Opportunity

Stack Overflow is driving the growth of technologists around the world

\$10BN Collaboration Market

According to Grandview Research

\$9.4BN DevOps Market

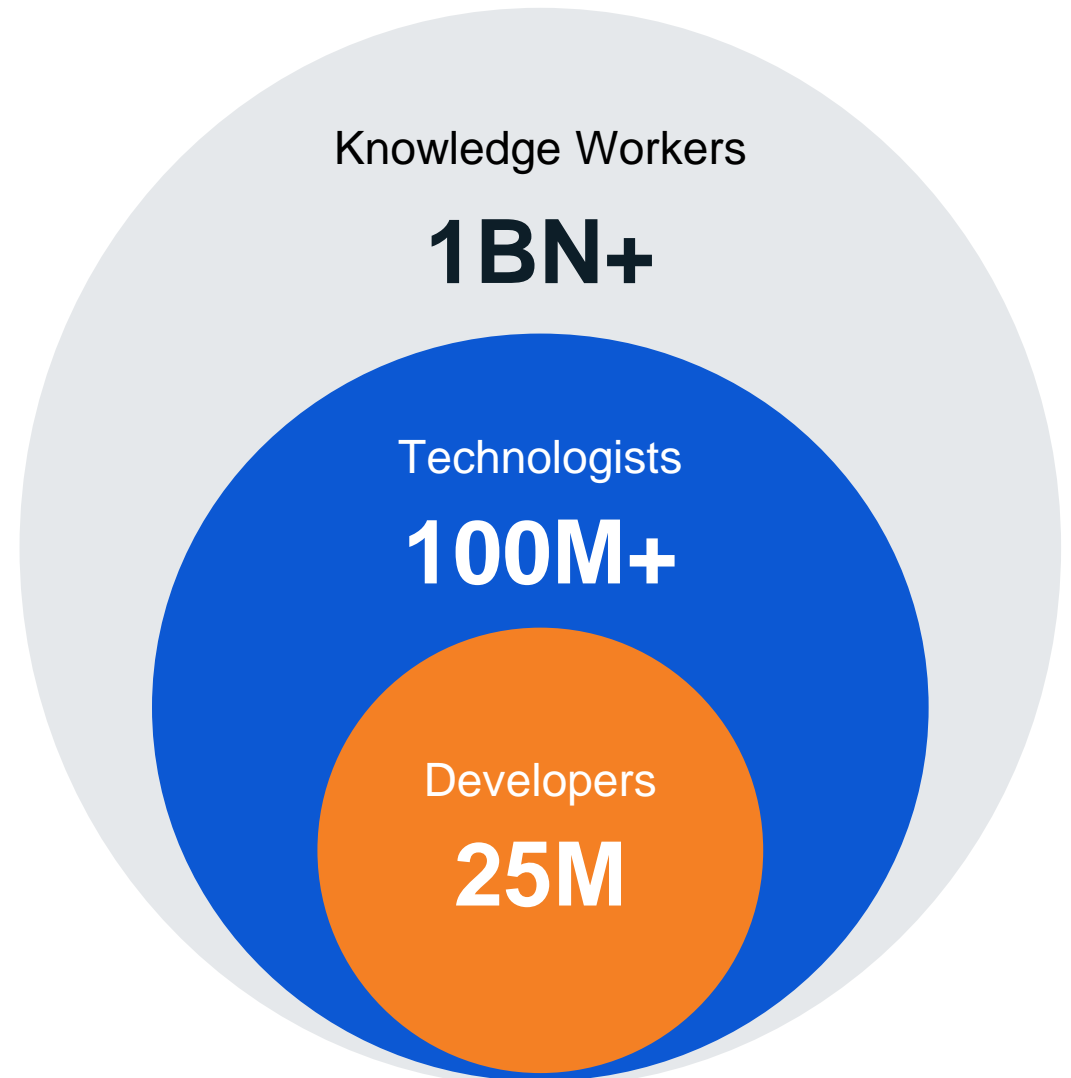
According to Allied Market Research by 2023

2x growth in workstream collaboration market

Over next 4 years, according to Gartner

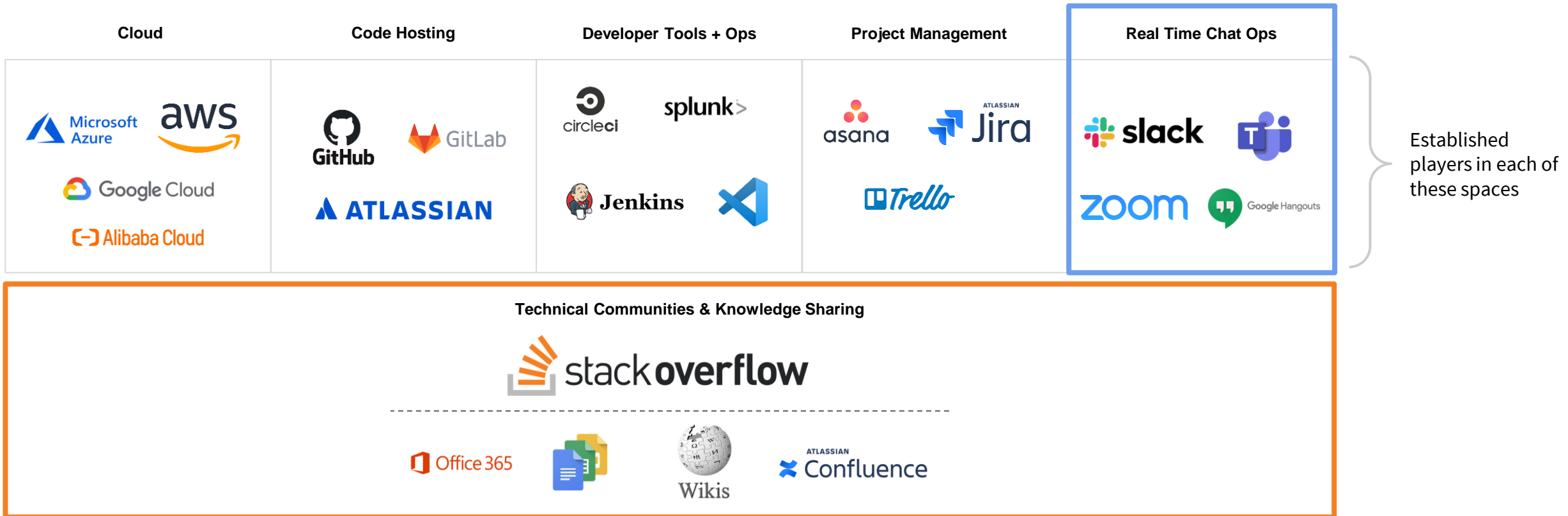
2x growth in number of worldwide developers

Over next 10 years, according to Slashdata



Stack Overflow for Teams: Essential in the “New” Stack

Technologists use a range of tools to make software, but still don't have a place to find accurate and reliable answers within companies...



Stack Overflow for Teams: Significant Momentum

Teams is used by **Fortune 500** companies like *Bloomberg* and *Microsoft* (Enterprise tier) and by small and mid-sized companies that are experiencing rapid growth.

68%

FY 22 Bookings growth

115%

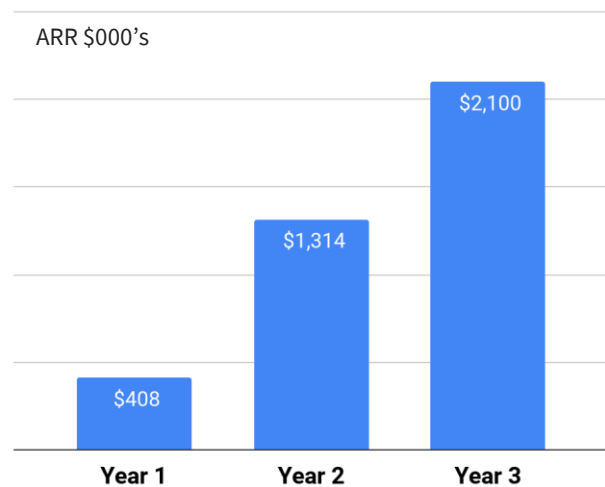
FY 22 Enterprise NRR

\$289K

FY Q4 22 Enterprise ASP

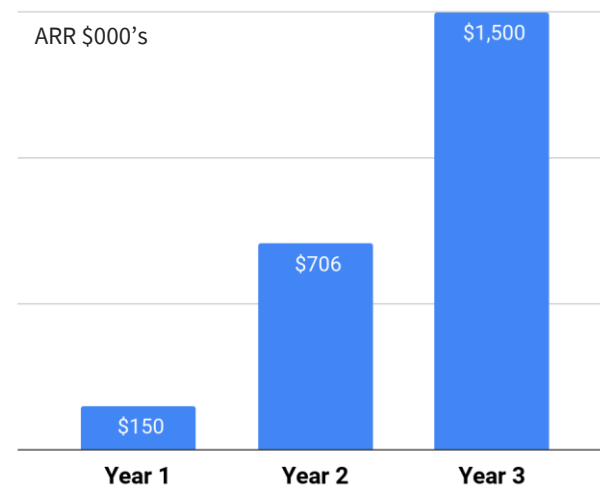


Stack Overflow for Teams: Land & Expand GTM Motion



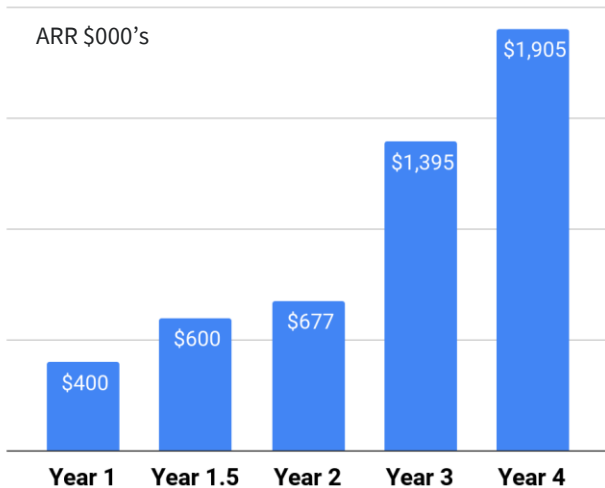
Global Financial Institution

- Over 65,000 technologists
- Latest contract is 3-Year ELA, paid upfront (\$6.8M)
- NRR: 160%



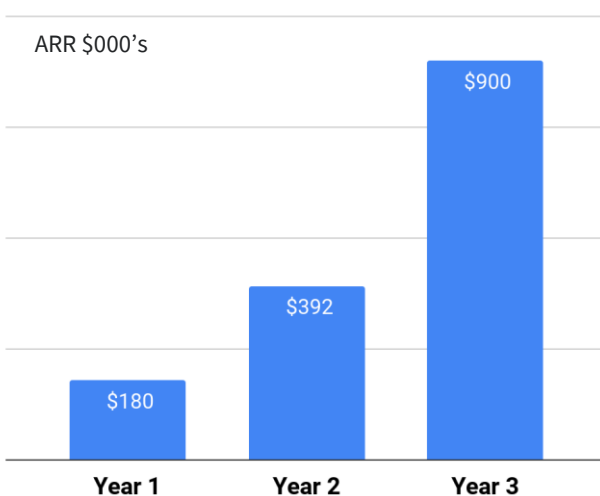
Global Software Provider

- Over 100,000+ technologists
- NRR: 212%



Global Telecom Provider

- Lighthouse customer (pre-2018)
- Technologists + non-Technologists
- NRR: 137%



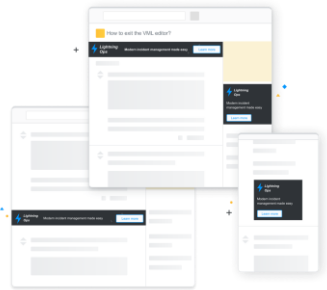
Global Insurance Provider

- NRR: 230%

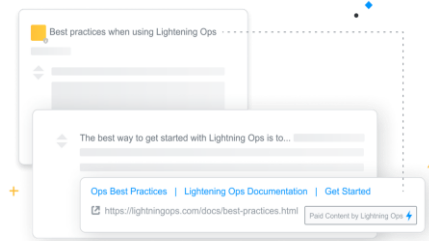
Stack Overflow Reach & Relevance

(Ads products)

Stack Overflow Advertising: Overview



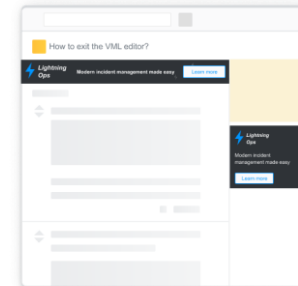
Banner Advertising



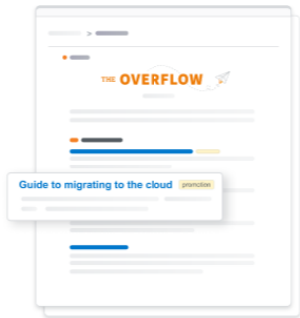
Direct-to-developers



Topic Tag Sponsorships



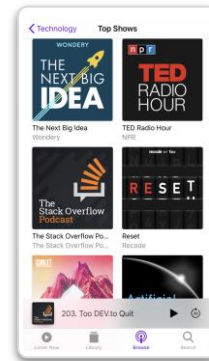
Site Sponsorships



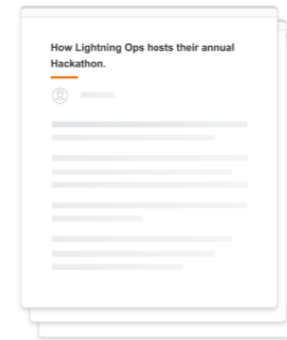
Newsletter Advertising



Podcast Advertising



Sponsored Podcasts



Sponsored Blog Posts






i View-through conversions are **14x higher** than click-through conversions

Collectives™ on Stack Overflow: Overview

Collectives™ are sub-communities within the public platform that centralize content around technologies and connect developers directly with the maintainers.

Initiatives supported:

- ✓ Community Development & Engagement
- ✓ Brand Awareness
- ✓ Developer Support & Experience
- ✓ User & Market Insights

	GitLab 17 tags associated	Join
GitLab is the open DevOps platform, delivered as a single application. Our open source collaboration is a great place to sha...		
	Google Cloud 184 tags associated	Join
Google Cloud provides organizations with leading infrastructure, platform capabilities and industry solutions to help them solve...		
	Go Language 65 tags associated	Join
The official Q&A channel for Google's Go Programming Language.		
	Intel 64 tags associated	Join
A space for developers to collaborate on Intel software tools, libraries, and resources. Share knowledge and connect with Intel...		
	Twilio 29 tags associated	Join
Twilio has democratized channels like voice, text, chat, video, and email by virtualizing the world's communications infrastructure...		

Stack Overflow Employer Branding: Overview

Company Updates offer an efficient way for companies to **stay top of mind** with relevant developers and technologists.

With features to **tell the company story**, it's an essential tool to keep candidate pipelines filled



Build a community through company stories



Post links to new content on Company Pages



Enable users to discover companies to work for

Follow your favorite companies ✕
By selecting follow, you are opting in to receive an email digest from the companies you follow. Don't worry, your information isn't shared.

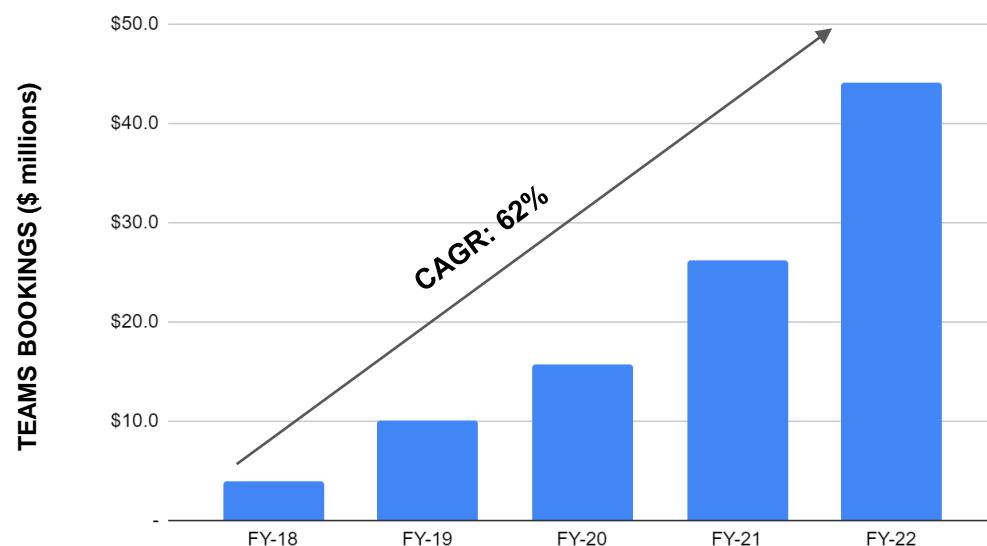
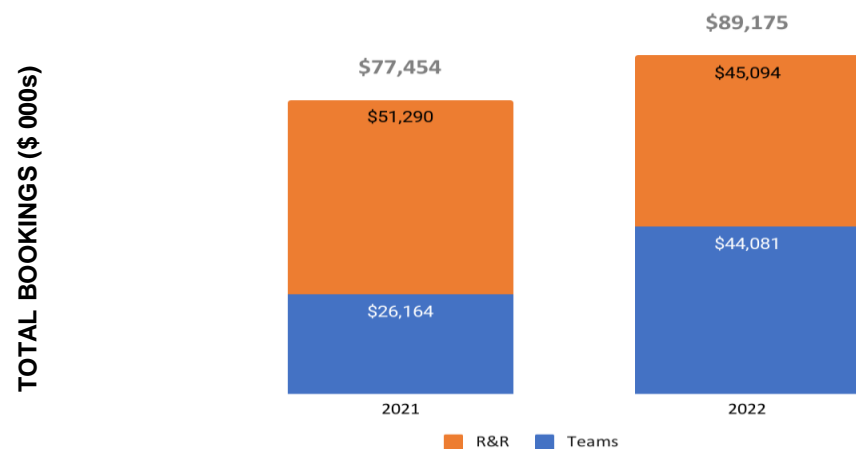
Follow ⋮

The screenshot displays the Ford Motor Company profile on Stack Overflow. The main content area features the company logo, a 'Follow' button, and a 'Best Teams' award for Engineering. Below this, there is a section for 'Best Engineering Teams 2022' with a link to corporate.ford.com. The right sidebar includes 'About' information, 'Office' location, and a 'Women Of Ford' link. A 'Follow' button is also visible in the top right corner of the profile area.



Stack Overflow Financials

Stack Overflow: Financial Summary



- **Teams:**

- **Hyper-Growth characteristics:**

- Rapidly scaling SaaS business (62% CAGR)
- Compounding recurring revenue model with NRR of 115% in the Enterprise segment
- High Enterprise ASP of ~\$289K; multiple \$1M+ deals in 2022
- Strong secular tailwinds with underlying macro trends impacting companies (distributed/remote collaboration, cloud transformation initiatives, innovation, etc.)

- **Current & Future focus:**

- Scaling sales, marketing and customer success efforts
- International sales and marketing expansion
- Product-led growth and bottoms up adoption in SMB and MidMarket segments
- Establishing SaaS alliances with large tech providers

- **Reach & Relevance (R&R):**

- Investing in technology infrastructure and public Community platform to drive high scale and engagement
- **Advertising:**
 - Ads business growing at a healthy rate and with high gross margins and new Ads product offerings (e.g., Collectives, EdTech)
- **Employer Branding**
 - Exited transactional Talent (job listings) business in FY 2022 and redefined Employer Branding business growing rapidly

Thank you.

stackoverflow.com

