



China Education and Training Industry Report,
2013-2016

July 2013

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

The education and training industry mainly involves in after-class tutoring, IT training, foreign language training, online education, pre-school education and skill cultivating. In China, the market size of the education and training industry soared from RMB610 billion in 2008 to RMB955.4 billion in 2012, with the CAGR of 11.87%.

During 2012-2013, the development of China education and training industry presented the following characteristics:

1. More and More Education Groups and Internet Enterprises Are Tapping Online Education Field

On the one hand, education institutions are launching online courses covering a wide range of domains, such as foreign language, qualification test, skill education, and tutoring for students at elementary and secondary schools; on the other hand, internet enterprises are making positive efforts in building platform to share education content. For example, Tencent initiated <http://v.qq.com/v/>; Netease launched <http://study.163.com>.

2. Private Kindergartens in China Are Witnessing Rapid Growth

The number of private kindergartens increased from 48,368 in 2002 to 115,404 in 2011, with the CAGR of 10.14% or the proportion surging from 43.28% to 69.21%. Thanks to the preferential policies, provinces and cities all across China have introduced “Three-Year-Long Pre-school Education Action Plan”, a move which triggered the number hike of kindergartens.

Founded in 1993, New Oriental Education & Technology Group, Inc. is mainly engaged in English training and consulting on studying abroad. Since 2008, it started to stretch the whole industrial chain, such as establishing Youwin individualized learning center and launching extracurricular counseling business. As of 2012, New Oriental Education & Technology Group, Inc. mainly involved in language training, test counseling, tutoring for elementary and secondary school students and students in kindergartens, online education, education software businesses and reselling of other education technologies. By revenue structure, language training and test counseling are major contributors to its revenue and profit.

Established in 2003, TAL EDUCATION GROUP specializes in extracurricular counseling, with tutoring services including small classes, personalized premium services and online courses as of 2012. In FY2013 (Feb.29, 2012-Feb.28, 2013), the revenue of the company increased by 27.27% year-on-year to USD225.93 million, with the net income surging by 37.54% year-on-year to USD33.44 million.

Xueda was set up in 2001, specializing in extracurricular counseling business, with the number of outlets soaring to 383 in 2012 from 32 in 2007, a CAGR of 64.29%. It has realized widespread outlet distribution. The annual enrollment of Xueda rose from 5,500 in 2007 to 138,700 in 2012, with the CAGR of 90.69%. In 2012, the revenue of the company surged by 32.21% year-on-year to USD293.16 million, with the gross margin of 29.5%.

The report highlights:

Overview of China Education Cause (including the number of pre-school education/compulsory education/high school and secondary education/ higher education schools, enrollment, number of internal students and number of graduates);

Development Environment of China Education and Training Industry (including GDP, population, residents' income and expenditure, national education fund input, macro-policy, etc.)

Development of Non-Government Funded Education and Vocational Education (survey, related polices, market breakdown, etc.)

Education and Training Industry Market (including overall market scale and tendency, IT training market, foreign language training market, young children's training market, after-class tutoring market, online education training market, etc.)

Profile, Revenue, Revenue Structure, Outlets & Students, Business Model and Latest Dynamics of Enterprises in the Education and Training Industry (including New Oriental Education & Technology Group, Inc., TAL EDUCATION GROUP, ChinaEdu Corp and China Distance Education Holdings Ltd., CDEL)

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