



**China Online Education Industry Report,  
2015-2018**

**Jan. 2016**

## 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

Since 2015, China online education industry has been characterized as follows:

The industry continues to grow rapidly. At present, China online education industry is still in its infancy, with the market size continuously expanding. Chinese online education market size grew at a CAGR of 18.96% in 2008-2014, and jumped by about 19.41% year on year to RMB119.17 billion in 2015.

Among online education market segments, the share of online higher education has gradually declined, while the share of K12 online education ascended from 6.47% in 2010 to 11.82% in 2015. Since 2014, the Internet giants (Baidu, Alibaba, Tencent), traditional education companies (New Oriental, TAL, Xueda Education, etc.), traditional enterprises (Central China Land Media) and education information firms (Talkweb) have deployed the K12 online education sector whose market size keeps growing in China. In 2015, Chinese elementary and secondary online education market size reached RMB13.8 billion, up 34.90% year on year; the online pre-school education market size hit RMB290 million or so, an increase of 31.82% over last year.

Compared with the spree in 2013-2014, the capital market has tended to be rational about online education investment and diversified the investment since 2015. In H1 2015, 25.8% of online education investment concentrated in K12, 16.7% in early childhood education, 15.7% in vocational education, 14.1% in language training and 9.4% in overseas studying. Besides, interest education, educational media, education informationization and tutoring O2O companies have attracted the capital market's attention as well.

Since 2015, some mature online education companies (such as Hujiang, New Oriental, Baidu Education, Taobao Education and TAL) have made progress by adjusting their business layout. After the business restructuring, Hujiang has formed four business systems: Hujiang.com, Hujiang community, learning tools and recording & broadcasting platform; Baidu has founded Baidu Education Division centering on Baidu Chuanke; TAL has formed the pattern -- "a platform, two divisions"

## Business Layout Adjustment of Leading Companies in China Online Education Industry, 2015

<b>Companies</b>	<b>Adjustment</b>
Hujiang	<i>In April 2015, Hujiang upgrades its brand strategy, renamed "Hujiang Network" as "Hujiang", and launched a new logo. Its four business systems comprise: Hujiang.com, Hujiang community, learning tools and recording &amp; broadcasting platform. After the upgrading, "Hujiang" becomes the company's parent brand; platform and mobile development turns to be the main direction for the company.</i>
New Oriental	<i>In April 2015, New Oriental officially released a B2B business brand "New Oriental Education Cloud" to fully integrate its B2B business and head for road of brand development.  In June, New Oriental readjusted its business layout, and combined the Group's Domestic Project Management Center, New Oriental Online's Domestic Examination Project Division and domestic divisions of all New Oriental schools into a new Domestic University Project Division.</i>
Baidu Education	<i>In September 2015, Baidu separated its online education platform "Zuoyebang" which was co-invested by Sequoia Capital and Legend Capital jointly in round A.  In December 2015, Baidu announced the establishment of Baidu Education Division centering on Baidu Chuanke in its Emerging Business Group. At the same time, Baidu also unveiled the "photosynthetic plan", and said it would build an educational platform with educational institutions to explore new business models concerning personalized solutions covering academy, employment, overseas study and entrepreneurship.</i>
Taobao Education	<i>In May 2015, Taobao Tongxue was officially renamed "Taobao Education", aiming at strengthening the value of "Taobao Education Platform". It will integrate online and offline into O2O comprehensive education services.</i>
TAL	<i>On July 31, 2015, TAL announced its organizational restructuring internally: Product Division and Further Education Division would be established. Product Division consists of: Xueersi Peiyou, izhikang, Xueersi Online School, Mobby, Lewaijiao and First Leap. Further Education Division comprises: Jiazhangbang (jzb.com), Kaoyanbang (kaoyan.com), Gaokaobang (gaokao.com) and Class Notice. Thus, TAL formed the pattern -- "a platform, two divisions".</i>

Source: ResearchInChina

China Online Education Industry Report, 2015-2018 by ResearchInChina focuses on the followings:

- Overview of online education industry (covering definition, classification, industrial chain, educational media and tools, teaching/business/profit models);
- Overview of education market (embracing investment, number of schools and students, non-governmental education, etc.);
- Development of online education market (including development process, development environments, status quo, market size, user base, structure of segments, investment and financing, etc.);
- Development (including business models, user base and market size) of market segments: online higher education, online vocational education, K12 online education (pre-school, primary and secondary online education), enterprise E-learning and language online education;
- Profile, revenue, business structure, online education business, business & profit models and business strategies of 15 online education companies (including Huijiang, New Oriental, TAL, Xueda Education, etc.)

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