China Online Education Industry Report, 2015-2018

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

<table>
<thead>
<tr>
<th>Companies</th>
<th>Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Huijiang</td>
<td>In April 2015, Huijiang upgrades its brand strategy, renamed &quot;Huijiang Network&quot; as &quot;Huijiang&quot;, and launched a new logo. Its four business systems comprise: Huijiang.com, Huijiang community, learning tools and recording &amp; broadcasting platform. After the upgrading, &quot;Huijiang&quot; becomes the company's parent brand; platform and mobile development turns to be the main direction for the company.</td>
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<td>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.</td>
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<td>Baidu Education</td>
<td>In September 2015, Baidu separated its online education platform &quot;Zuoyebang&quot; which was co-invested by Sequoia Capital and Legend Capital jointly in round A.</td>
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<td>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 &quot;photosynthetic plan&quot;, 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.</td>
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<td>Taobao Education</td>
<td>In May 2015, Taobao Tongxue was officially renamed &quot;Taobao Education&quot;, aiming at strengthening the value of &quot;Taobao Education Platform&quot;. It will integrate online and offline into O2O comprehensive education services.</td>
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<td>TAL</td>
<td>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, izhihong, 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 -- &quot;a platform, two divisions&quot;.</td>
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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 Hujiang, New Oriental, TAL, Xueda Education, etc.)
Preface

1. Overview of Online Education Industry
   1.1 Definition and Classification
   1.2 Industry Chain
   1.3 Educational Media and Tools
   1.3.1 Educational Media
   1.3.2 Educational Tools
   1.4 Teaching Models
   1.4.1 Recorded
   1.4.2 Live
   1.4.3 Flipped Classroom
   1.5 Platform Mode
   1.5.1 Overview of Teaching Platform
   1.5.2 B2C
   1.5.3 C2C
   1.5.4 O2O
   1.5.5 MOOC
   1.5.6 Open Platform
   1.5.7 Teacher-Student-Parent Online Interaction and Communications Platform
   1.6 Profit Model

2. Overview of China Education Industry
   2.1 Education Fund Investment
   2.2 Development of Schools and Students
   2.3 Private Education

3. Development of China Online Education Industry
   3.1 Development Course
   3.2 Development Environment
   3.2.1 Policy Environment

4. Market Segments in China Online Education Industry
   4.1 Enterprise E-Learning
   4.1.1 Development
   4.1.2 Business Model
   4.1.3 Market Size
   4.1.4 Number of Users
   4.2 Online Higher Education
   4.2.1 American Online Higher Education
   4.2.2 Chinese Higher Networking Academy
   4.2.3 Market Size
   4.2.4 Number of Users
   4.3 Online Vocational Education
   4.3.1 Development
   4.3.2 Market Size
   4.3.3 Number of Users
   4.4 K12 Online Education
   4.4.1 Product Classification
   4.4.2 Analysis of Competitors
   4.5 Online Elementary and Secondary Education
   4.5.1 Development
   4.5.2 Business Model
   4.5.3 Market Size
   4.5.4 Number of Users
   4.6 Online Pre-school Education
   4.6.1 Development
   4.6.2 Parenting Websites
   4.6.3 Online Children English Training
   4.6.4 Market Size
   4.6.5 Number of Users
   4.7 Online Language Education
   4.7.1 Development
   4.7.2 Market Size
   4.7.3 Number of Users

5. Key Enterprises in China Online Education Industry
   5.1 Hujiang
   5.1.1 Profile
   5.1.2 Development Course
   5.1.3 Business Model
   5.1.4 Profit Model
   5.1.5 Layout in Mobile Business
   5.2 New Oriental Education and Technology Group
   5.2.1 Profile
   5.2.2 Development Course
   5.2.3 Operation
   5.2.4 Online Education Business
   5.3 ChinaEdu Corporation
   5.3.1 Profile
5.3.2 Online Education Business
5.4 China Distance Education Holdings Ltd.
  5.4.1 Profile
  5.4.2 Operation
  5.4.3 Business Model
  5.4.4 Development Plan
5.5 TAL Education Group
  5.5.1 Profile
  5.5.2 Development Course
  5.5.3 Operation
  5.5.4 Student Enrollments
  5.5.5 Online Education Business
  5.5.6 Development Strategy
5.6 Xueda Education Group
  5.6.1 Profile
  5.6.2 Development Course
  5.6.3 Operation
  5.6.4 Online Education Business
  5.6.5 Development Plan
5.7 Tarena Technology Group Ltd.
  5.7.1 Profile
  5.7.2 Development Course
  5.7.3 Operation
  5.7.4 Student Enrollments
  5.7.5 Profit Model
  5.7.6 Online Education Business
  5.7.7 Development Strategy
5.8 ATA Inc.
  5.8.1 Profile
  5.8.2 Development Course
  5.8.3 Operating Data
5.8.4 Operation
  5.8.5 Online Education Business
  5.8.6 Development Strategy
5.9 Taobao Jiaoyu
  5.9.1 Profile
  5.9.2 Business Model
  5.9.3 Strategy Adjustment
5.10 Tencent Classroom
  5.10.1 Profile
  5.10.2 Development Advantages
  5.10.3 Development Plan
  5.10.4 Dynamics
5.11 Baidu Jiaoyu
  5.11.1 Profile
  5.11.2 Dynamics in 2015
  5.11.3 Operating Data
5.12 NetEase Cloud Classroom
  5.12.1 Profile
  5.12.2 Dynamics in 2015
5.13 Genshuixue
  5.13.1 Profile
  5.13.2 Business Model
  5.13.3 Profit Model
5.14 17zuoye
  5.14.1 Profile
  5.14.2 Financing
  5.15 Youdao School
6. Development Trends and Forecast
  6.1 Development Trends
  6.2 Market Size Forecast
• Chinese Online Education Market Size Structure (by User Age), 2010-2015
• Chinese Online Education Market Size Structure (by Content), 2013-2015
• Number of Global Online Education Venture Investment and M&A Cases, 2013-2014
• Amount of Global Online Education Venture Investment and M&A Transactions, 2013-2014
• Distribution of Global Online Education Venture Investment by Field, 2014
• Distribution of Global Online Education Venture Investment by Region, 2014
• Venture Investment in Global Educational IT/Supporting Service Field, 2014
• Venture Investment in Global Skill Education Field, 2014
• Venture Investment in Global Basic Education Field, 2014
• China’s Online Education Venture Investment Deals and Amount, 2013-2014
• China’s Online Education Investment Structure, H1 2015
• Distribution of Chinese and US Online Education Venture Investment by Field, 2014
• Main Financing Cases in China Online Education Industry, 2015
• Comparison between Traditional Corporate Training and E-learning
• Service Model of Corporate E-learning
• Major Enterprises’ E-learning Management System Suppliers in China and Worldwide
• Corporate E-learning Platform and Courseware Prices
• China’s Corporate E-learning Market Size and YoY Growth, 2010-2015
• China’s Corporate E-Learning User Scale, 2013-2015
• Business Model of MOOC
• Profit Model of Typical American MOOC Platform Providers
• Online Education Colleges Approved by the Ministry of Education, 2015
• Online Higher Education Market Size and YoY Growth Rate in China, 2010-2015
• Online Higher Education Users in China, 2013-2015
• Online Vocational Training Market Size and YoY Growth in China, 2010-2015
Selected Charts

- Online Vocational Training Users in China, 2013-2015
- Classification of K12 Online Education Products in China
- Competitive Bodies of K12 Online Education in China
- Internet Giants’ Layout in China’s K12 Online Education
- Traditional Education Enterprises’ Layout in China’s K12 Online Education
- Traditional Enterprises’ Layout in China’s K12 Online Education
- Advantages and Disadvantages of Three Types of Competitive Bodies
- Number of Primary and Secondary School Students in China, 2008-2014
- Online Primary and Secondary Education Business Model and Typical Websites
- Online Elementary and Secondary Education Market Size and YoY Growth in China, 2010-2015
- Online Elementary and Secondary Education Users in China, 2013-2015
- Number of Children in Kindergarten and YoY Growth, 2008-2014
- China’s Major Parenting Websites
- China’s Major Online Children English Training Institutions
- China’s Online Pre-school Education Market Size and YoY Growth, 2010-2015
- Online Pre-school Education Users in China, 2013-2015
- Types, Characteristics, and Key Enterprises of Online Language Education in China
- Online English Education Characteristics in China
- Online Minority Language Education Characteristics in China
- Key Enterprises Comparison in China Online Language Education
- China’s Online Language Education Market Size and YoY Growth, 2008-2015
- China’s Online Language Education Market Size (by Market Segments), 2008-2015
- China’s Online Language Education Users, 2008-2015
- China’s Online Language Education Users (by Market Segments), 2008-2015
- Main Operating Data of Hujiang (by end-2015)
• Development Course of Hujiang
• Business System of Hujiang
• Development Course of New Oriental
• Revenue and YoY Growth of New Oriental, FY2009-FY2016E
• Net Income and YoY Growth of New Oriental, FY2009-FY2016E
• Revenue Breakdown of New Oriental (by Business Units), FY2009-FY2016E
• Development Course of Koolearn
• Main Platforms of Koolearn
• Online Education Business of ChinaEdu
• Revenue and YoY Growth of China Distance Education, 2008-2015
• Net Income and YoY Growth of China Distance Education, 2008-2015
• Revenue Breakdown of China Distance Education (by Business Units), FY2010-FY2015
• Course Enrollments of China Distance Education, FY2009-FY2015
• Business Structure of China Distance Education
• Course Forms of China Distance Education
• Business Introduction of TAL
• Development Course of TAL
• Revenue and Net Income of TAL, FY2011-FY2016E
• Revenue Structure of TAL (by Business Units), FY2015-FY2016E
• Gross Profit and Operating Income of TAL, FY2012-FY2016E
• Revenue Structure of TAL (by Regions), FY2010-FY2016E
• Student Enrollments and Number of Learning Centers of TAL
• Business Distribution of TAL in China (by end-2015)
• Development Course of Online Education Business of TAL
• Online Education Business Coverage of TAL
Selected Charts

- Revenue of Online Education Business of TAL, FY2011 vs FY2016E
- Development Plan of TAL
- Business Model of Xueda Education
- Business Network of Xueda Education
- Development Course of Xueda Education
- Revenue and Net Income of Xueda Education, 2010-2015
- Introduction of Online Education Platform of Xueda Education
- Development Plan of Xueda Education
- Business Introduction of Tarena
- Development Course of Tarena
- Main Financials of Tarena, 2011-2015
- Quarterly Revenue of Tarena, 2013-2015
- Quarterly Student Enrollments of Tarena, 2013-2015
- Student Enrollments of Tarena, 2012-2015
- Learning Centers Distribution of Tarena in China
- Learning Centers Distribution of Tarena in China (by Cities)
- Average Advertising Spending Per Student Enrollment of Tarena, 2013-2015
- Student Enrollments Structure of Tarena in 2015
- Tarena’s Development Plan
- Introduction of ATA Inc.
- Business Fields of ATA Inc.
- Development Course of ATA Inc.
- Test Centers Distribution of ATA Inc. in China
- Main Financials of ATA Inc., FY2015-FY2016E
- Revenue Structure of ATA Inc., FY2015-FY2016E
• Introduction of Online Education Business of ATA Inc.
• Business Introduction of Tencent Classroom
• Baidu Jiaoyu’s Layout in Online Education
• Introduction of Genshuixue
• Financing Cases of 17zuoye
• Operation Model of Youdao School
• Online Education Users Distribution in China (by Cities), 2013 vs 2015
• Education Expenditures as % of Household Income in Major Countries
• Online Education Market Size in China, 2015-2018E
• Online Education Users in China, 2015-2018E
• Online Education Market Size Structure (by Market Segments) in China, 2015-2018E
• Market Size of Online Pre-school Education in China, 2015-2018E
• Market Size of Online Elementary and Secondary Education in China, 2015-2018E
• Market Size of Online Higher Education in China, 2015-2018E
• Market Size of Online Vocational Training in China, 2015-2018E
• Market Size of Enterprise E-Learning in China, 2015-2018E
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