

China Pre-school Education (Kindergarten) Industry Research Report, 2016

Feb. 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 2010, China has introduced a number of policies such as the Outline of Medium and Long-term Programs for National Education Reform and Development (2010-2020), Preschool Education Three-Year Action Plan, etc. to strongly prompt the development of preschool education. As of 2014, China had invested RMB204.876 billion in preschool education, 8.37 times that in 2009, which basically eased the "kindergarten crunch" and other issues.

Under the radical impetus of policies, China kindergarten industry advances rapidly and shows the following characteristics:

1, A substantial increase in the number of kindergartens, especially private kindergartens.

In China, the number of kindergartens jumped from 116,000 in 2003 to approximately 219,000 at the end of 2015 with a CAGR of 5.4%; wherein, the number of private kindergartens swelled from 55,500 to 143,500 at a CAGR of 8.2%.

2, Significant regional differences due to varying economic levels.

In 2015, Beijing, Shanghai, Guangzhou and other economically developed regions saw the gross enrollment rate of 3-year preschool education hit more than 95% while the central and western regions (such as Tibet, Yunnan, Guangxi and Ningxia) only about 60%.

3, Few dominant enterprises, low market concentration.

A kindergarten has limited range of influence, so the Chinese kindergarten market is scattered. Plus, nationwide brand kindergartens are rare, and the market CR5 is less than 2.0%.

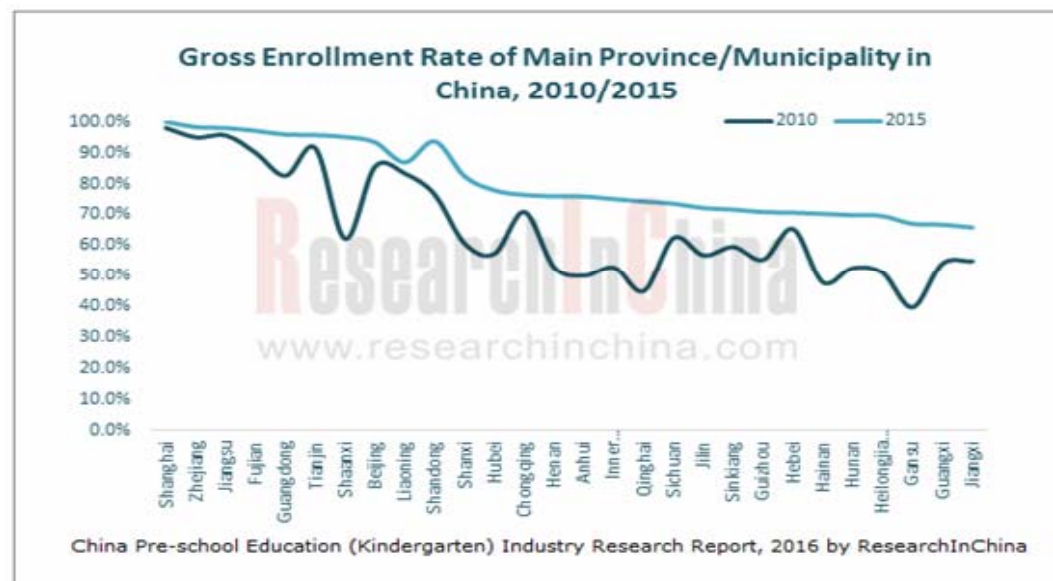
4, The promising preschool education market attracts numerous listed companies.

In 2015, numerous listed companies got involved in kindergartens, for instance, Jiangsu Xiuqiang Glasswork Co., Ltd. acquired Whole Person Education, Vtron Technologies Ltd. took over Hoing Education and Golden Cradle, Time Publishing and Media Co., Ltd. built its own kindergartens.

5, Preschool education + Internet becomes increasingly popular.

Amid the development of Internet, brand kindergartens have enhanced competitiveness via the Internet. They mainly build websites to facilitate the interaction with parents, present online orientation courses, enroll students, etc.

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China Preschool Education (Kindergarten) Industry Research Report, 2016 by ResearchInChina focuses on the following:

- Development of China education industry (including number of various schools, enrollments, education funding and spending, private education, etc.);
- Development environment (including policies and society) and teaching models of kindergartens in China;
- Development of China kindergarten industry (containing number of kindergartens and enrollments by institution/province (municipality)/region, faculty and structure, competitive landscape, development trend, etc.);
- Development of private kindergartens (including relevant policies, number of kindergartens, enrollments, faculty and structure, operating modes, charges, competitive pattern, etc.);
- Development of kindergartens in Beijing, Shanghai, Tianjin, Chongqing, etc. (embracing overall conditions and development of private kindergartens);
- 14 preschool education institutions (covering profile, educational philosophy, curriculum, regional distribution of kindergartens, charges, main kindergartens).

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