China Online Education Industry Report, 2016-2021

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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

Online education industry in China was characterized by and showed the trends as follows in 2016:

1. Steady growth in market size and user scale

China's online education industry has expanded at a rate of around 20% in recent years, with the market worth of RMB150.7 billion in 2016, a year-on-year growth of 23%. Meanwhile, user scale also increased rapidly, reaching 89.27 million in the same period, a 21.9% rise from a year ago.

Propelled by favorable policies and capital inflows, the Chinese online education market and user scale will maintain a rapid growth rate, hitting an estimated RMB421.6 billion and 241.6 million in 2021, respectively.

2. Industry development driven by capital injection

More governmental spending on education, accelerated revision of the laws on private education and supporting policies, and introduction of relevant policies create broad space for the development of online education in China and attract the attention of capital market. In 2016, there were a total of 140 domestic online education investment programs with aggregate amount of more than RMB14.886 billion, including 32 ones each worth of over RMB100 million.

3. Shift from PC to Mobile Client

Despite a high concentration of online education in PC, mobile-client has the advantage of enabling users to maximize fragmented time to learn, while PC cannot allow users to study in any place and at any time. Meanwhile, 95.1% of Chinese internet users are mobile netizens, meaning that people's living habits are growingly based on mobile client, which provides a foundation for mobile online education. Hence, driven by changes in user demand and living habits, domestic online education is shifting from PC to mobile client.

4. Huge development potential of K12 online education market

As the younger generation (post-80s and 90s) become parents, they have higher requirements on education for children and spend more on education; as the two-child policy is implemented, the number of children in K12-education age group will increase steadily and market demand will further expand. It is expected the Chinese K12 online education market will grow at a pace of over 30% over the next five years, reaching RMB82.31 billion in 2021.

In addition, among 32 programs each with a total amount of more than RMB100 million in online education industry in China in 2016, 15 ones involved K12 online education, making up 46.7%. The flow of capital clearly shows the development potential of K12 online education market.

RMB100 mln-and-more K12 Online Education Programs in China in 2016

No.	Company/Program	Round	Amount (RMB in million)	Category	Product/Service
1	babytree	Investment	3,000	Preschool education	Parenting APP/intelligent toys
2	Zuoyebang	B	400	Primary and secondary education	Do exercises / live streaming
3	Koolearn	Investment	325	Primary and secondary education	Online learning
4	Jerry Education	A	260	Primary and secondary education	All-discipline training
5	Yuanfudao	Investment	260	Primary and secondary education	Question bank / live streaming
6	kuaxue.com	Acquisition	250	Primary and secondary education	Online learning
7	Zhang Tong Jia Yuan	C	200	Preschool education	Live streaming
8	Qinbaobao	B	200	Preschool education	Growth recording APP
9	zhangmen.com	C	200	Primary and secondary education	One-to-one tutoring
10	Huivo	B	150	Preschool education	Family-school interaction
11	Mofangge	B/B+	147.9	Primary and secondary education	Learning community
12	Fengkuang Laoshi	C	120	Primary and secondary education	O2O/ live streaming
13	changingedu.com	C+	120	Primary and secondary education	Tutoring / live streaming
14	ibeiliao	B	100	Preschool education	Growth assessment
15	Knowbox	B	100	Primary and secondary education	K12 education

Source: ResearchInChina

China Online Education Industry Report, 2016-2021 highlights the following:

- Education industry in China (spending on education, various kinds of schools and students, private education);
- Online education in China (development course, environment, status quo, market size, user scale, financing, and development trends);
- Online education market segments in China (enterprise E-learning, online higher curricula education, online vocational education, K12 online education, and online language education);
- 17 Chinese online education enterprises.

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