China Online Education Industry Report, 2015-2018

Description: 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"

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.).

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