



Online Education Market in China

Even given the high importance placed on education in China, the speed of growth in online education has surprised many. China's online education market share has tripled from CNY 38 billion (EUR 4.59 billion)¹ in 2008 to CNY 99 billion (EUR 11 billion) in 2012. Many offline education institutions have shifted online and the market has attracted big Chinese technology companies hungry for a share. In addition, numerous foreign educational providers have moved towards this prospective market. All in all, the online education platform provides for all ages but targets mainly adults and professionals. The trend of more and more businesses adopting online education to further upgrade their employees' skills is also clear in the report.

¹ The exchange rate used in this report: 1 CNY = 0.121 EUR
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1 Background

1.1 Big family investment in education

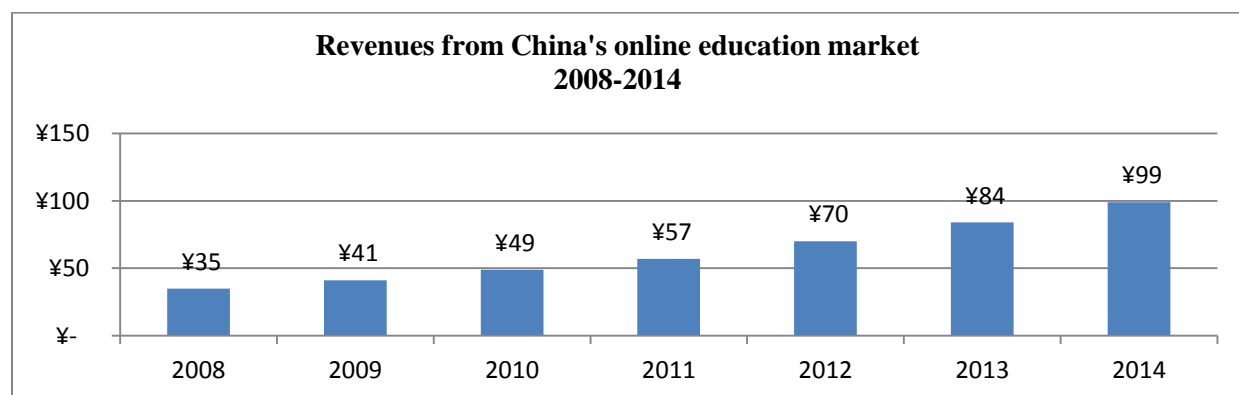
The importance of education has been highly valued by the Chinese families since ancient time, and it is still true in today's China where success is measured by one's achievements. According to Technode Asia, average 30% of household income in China is spent on education, compared to 22% in Korea and 10% in Japan. China is the country that spends the most on education in Asia. Education has long been seen as the way to lift a person's social standing. This is extremely relevant in the Chinese context where there is increasing urbanisation with the migration of rural citizens to urban areas.

1.2 Growing affluence

In pushing forward the growth of the online education market, the growing affluence of the Chinese people has played a big role. As China has become increasingly prosperous, more families have had the financial ability to send their children abroad to study. According to the 2012 Open Doors Report on International Educational Exchange, the majority of international students in the United States are Chinese. In preparation for studying abroad, students are willing to study other languages and take overseas school entrance exam preparations to get themselves prepared; many of them will turn to online platforms.

Similarly, according to Technode, more people are willing to pay for professional exam preparation and testing because China's population is growing and there is increasing competition for good jobs. The online education market is growing at a fast rate to meet the increasing demand. This can be seen in the increasing revenues being produced within the industry. From 2008 to 2012 revenues have tripled to CNY 99 billion (EUR 11 billion).

Figure 1



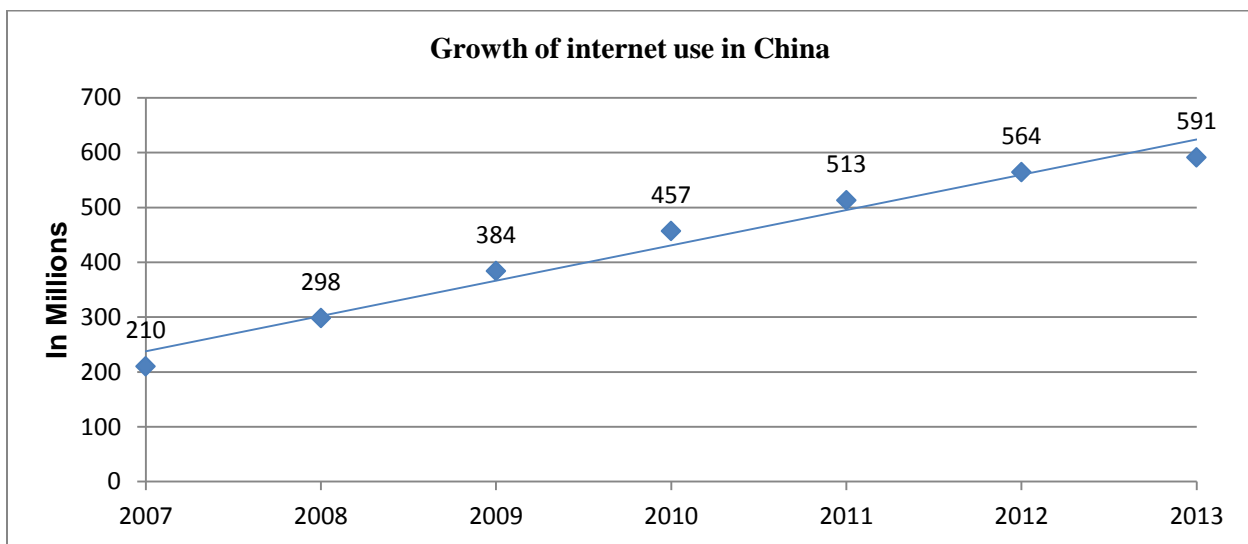
Source: The boom of China's online education market, Marketing China.

Note: Numbers are in billions of CNY

1.3 Internet growth in China

The Chinese are now spending more time using technology, going online for a myriad of reasons such as work, education and recreation. According to Digital Stats, around 75% of the Chinese consumers spend more time online than using any other medium. The article also states that this is the biggest digital evolution in China in the past five years. The evidence is the growth of internet users in China, shown in Figure 2. Techcrunch China reports that there are approximately 600 million internet users in China. Such trends reflect the potential market share of online business in China. With close to half of the Chinese population actively using the internet – 600 million people – the attraction to online businesses is clear.

Figure 2

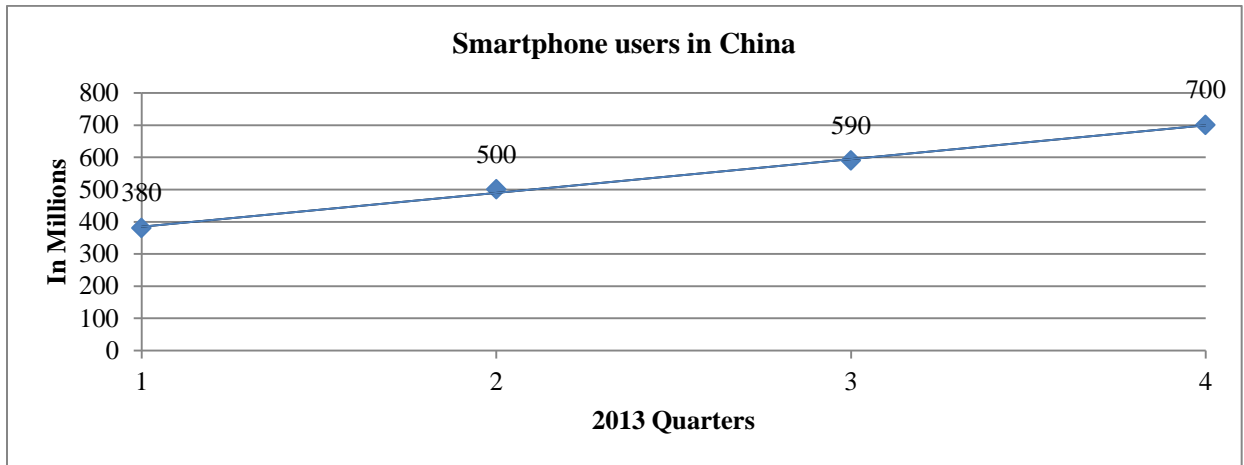


Source: China Internet Network Information Center, Get the data

1.4 Online is going mobile

Another driver for online education is the increasing processing power of mobile phones. Mobile learning is now viable. In the Chinese market, most online companies have apps to promote their product. Educational providers such as Education First and Huijiang have mobile apps to teach too. Mobile is more compact and flexible and overall is becoming the top preference for consumers. According to China Internet Watch, the number of China Mobile internet users reached 857 million in the first quarter of 2014. Since November 2011, China has been the world's largest smartphone market. Lower smartphone prices are driving up mobile phone ownership.

Figure 3

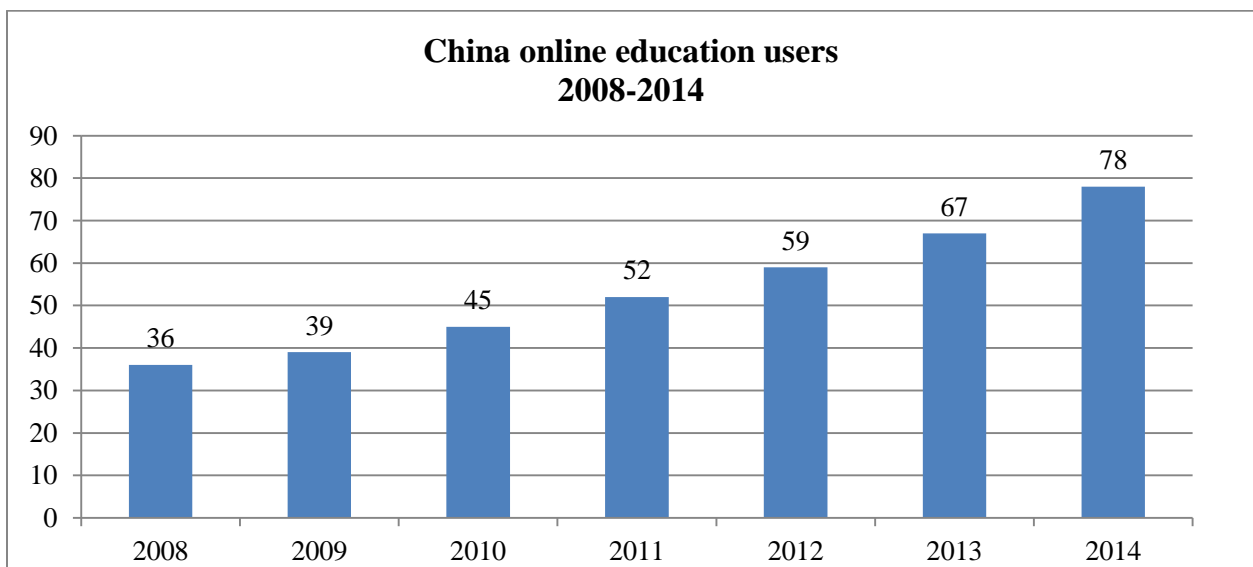


Source: Umeng Analytics Platform, www.umeng.com

Umeng, an established and reputed analytics firm in China, has revealed that in the last quarter of 2013, the number of active smartphones in China exceeded 700 million. This increase in mobile users signals a new direction for online businesses, which are beginning to make their products and services known and available through mobile devices.

In this context, the number of online education users in China has grown significantly, from 36 million in 2008 to 78 million in 2014 and this trend looks set continue.

Figure 4



Source: The boom in China's online education market, Marketing China.

Note: Numbers are in millions.

2 Market overview

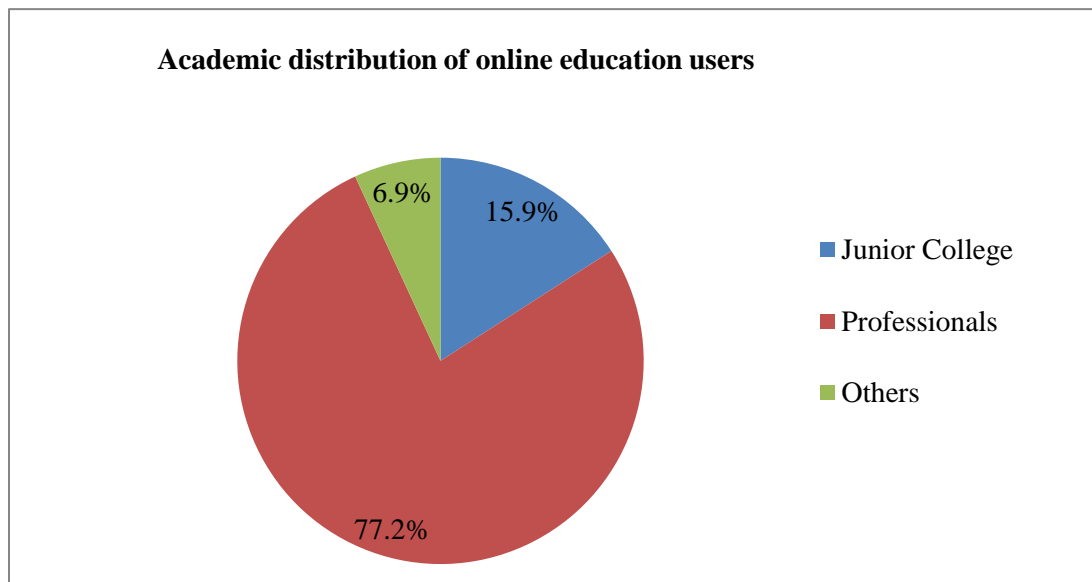
Offline education providers still dominate the education market, but the attractiveness of the online education market is capturing the attention of offline schools and making them shift part of their offering online. This chapter provides information of the Chinese consumers, the most popular online education products, the major players in the market, and the key trends in this sector.

2.1 Consumer behaviour

2.1.1 Who's using online education?

As shown in the figure below, the majority of online education users in China are professionals (77.2%), followed by junior college students (15.9%) and other users (6.9%).

Figure 7

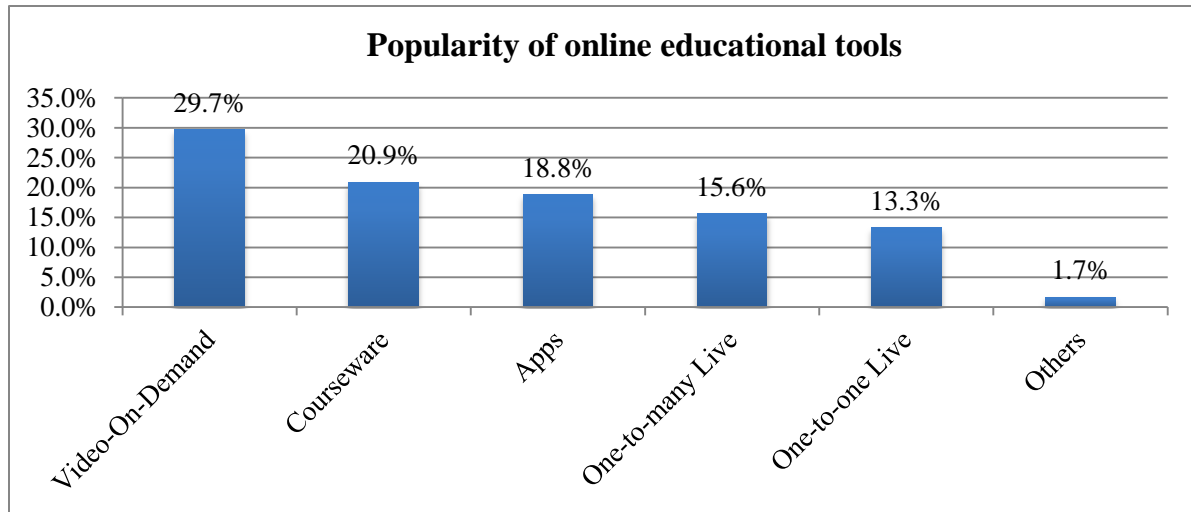


Source: 2013-2014 Online Education User Behaviour Analysis Report in China, PR Newswire

2.1.2 What are they using?

In terms of online educational tools video streaming ranks top with 29.7%, followed by courseware with 20.9%. Video streaming is very popular and there is a big range of different types of videos. Video clips come in the form of teachers teaching students or cartoons with an educational storyline. With video streaming, students can have access to lectures, notes, assignments and communication tools in a more interactive way than the traditional manner experienced in offline schools.

Figure 8

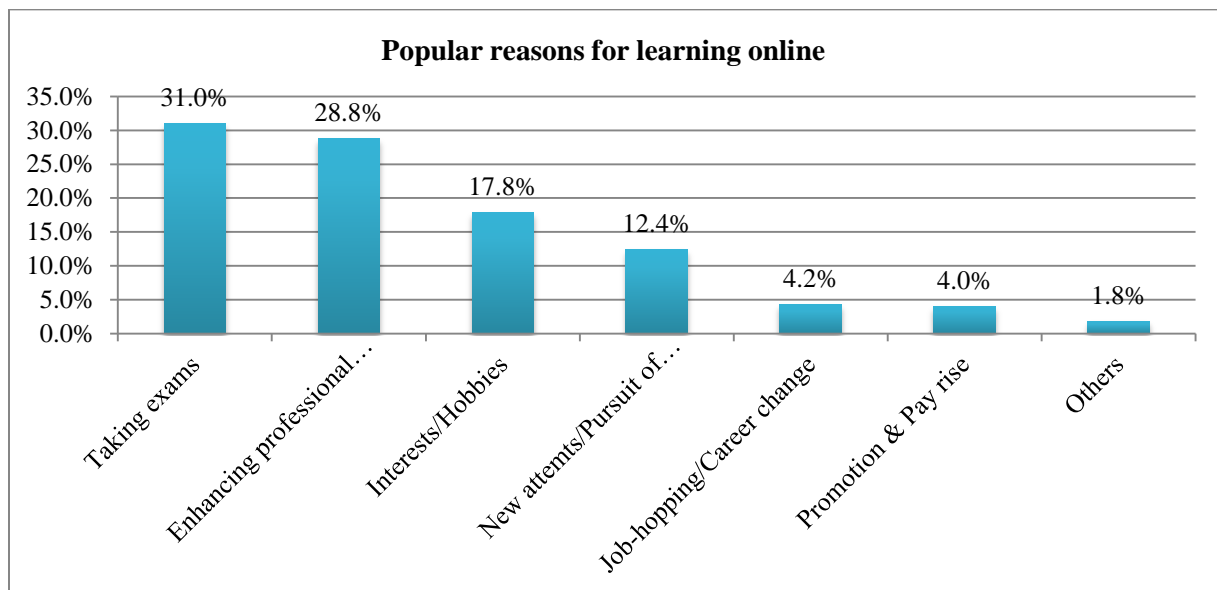


Source: 2013-2014 Online Education User Behavior Analysis Report In China, PR Newswire

2.1.3 Key reasons for using

According to Hujiang - a prominent local online education provider, the main motivation for the Chinese users to study online are to prepare for exams (31%) and improving professional skills (28.8%), followed by interests and hobbies (17.8%), new attempts (12.4%), job-hopping (4.2%), promotion and pay raise (4%).

Figure 9



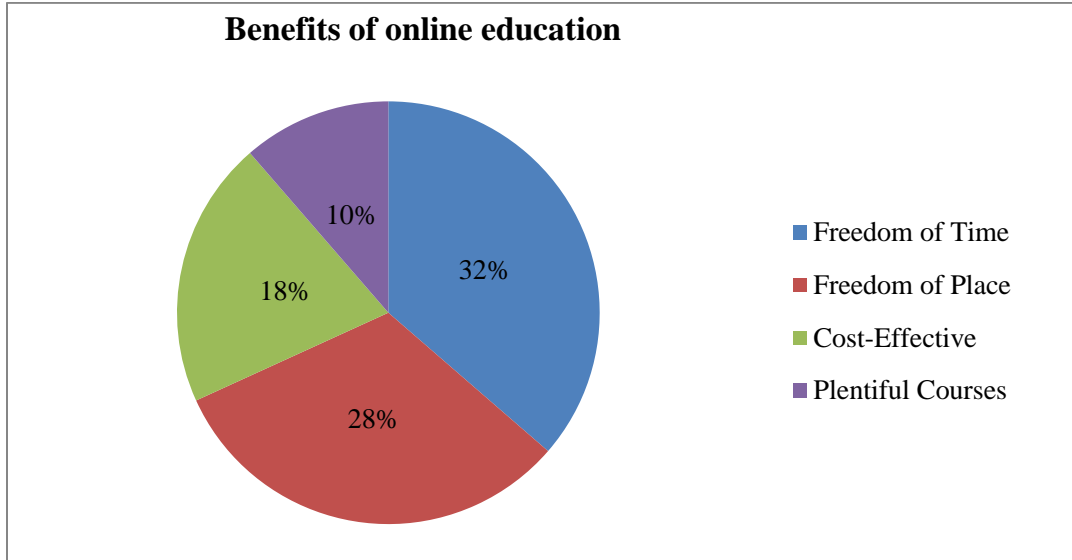
Source: 2013-2014 Online Education User Behavior Analysis Report in China, PR Newswire

2.1.4 Key benefits

Benefits for online learners

The main benefits for online learners include flexibilities in time and location, as well as low cost and easy access to a variety of subjects.

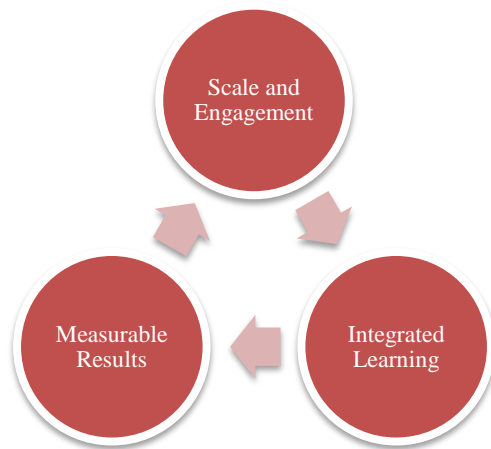
Figure 10



Source: 2013-2014 Online Education User Behavior Analysis Report In China, PR Newswire

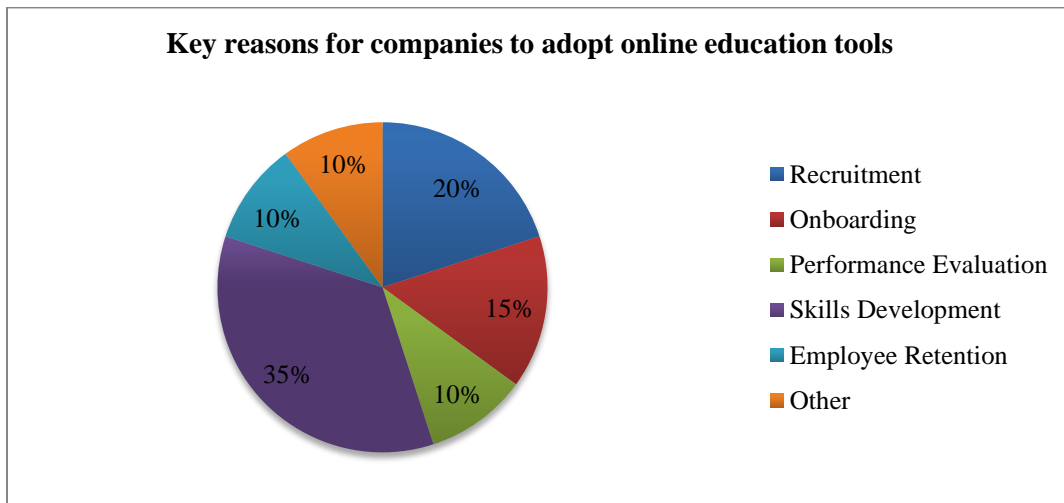
Benefits for business

The overarching advantages of online education for businesses are scale and engagement, integrated learning and measurable results. Scale and engagement refers to online education being time efficient. One teacher will be able to teach a far larger number of students than would fit into a traditional offline classroom. Also, any student can learn anytime and anywhere; learning is on the go. Online education also provides integrated learning which means students are able to use what they learn to aid them in their daily working lives. Learning from online education has a purpose and students are able to use the skills they learn. Results from online learning can be measured through improvements in employee performance at work.



According to the EU SME Centre’s survey, companies that already adopt online tools in China are using them primarily for employees’ skill development (35%) and recruitment (20%), as shown in the figure below.

Figure 11



Source: EU SME Centre online survey

2.2 Types of online education tools

Currently, the two most popular tools in China are MOOC (Massive Open Online Course) and video streaming. MOOCs are a recent development in distance education³ that only began to emerge in 2012. A MOOC is an online teaching forum where classes may number 100,000+ students. Everything is done online and anyone around the world with a computer can attend. MOOC emphasises open access features, such as connectivism⁴ and sharing licensing of content, structure, and learning goals. It allows educational content and resources to be reused. The courses are similar to college courses but they do not offer credits, however it is indicated that this may change.

Other educational tools include one-to-one tutoring, chatting platforms, educational games, mobile, online tests and the O2O model. One-to-one tutoring is the traditional student-to-teacher teaching model where teachers tutor students and monitor their progress. The chatting platform is helpful because without practice a new language can easily be forgotten and as the saying goes, practice makes perfect. Educational games can further facilitate the learning progress, and this method works well for all ages. Games range from cartoon games for preschool kids to learn new words to flashcard games that help students to learn a new language, learning via apps on mobile devices is another tool. With mobile, the main benefit is that you can learn anywhere. Online tests are another helpful tool as students can test themselves in preparation for the actual test. Doing online tests helps students figure out what they don't know or may have missed.

Lastly, the O2O (online-to-offline) model has become widespread. O2O is a blended learning solution that connects online and offline educational materials. In this term, offline refers to the traditional institutional centres that provide textbooks and hard copy educational materials. Meanwhile the online channel refers to educational materials placed on websites/portal and also on mobile apps. With the O2O model, institutional centres offer students the chance to learn through online tools while supplementing the learning process from offline materials.

The table below lists the tools educational institutions provide and the age categories that companies are targeting. It can be seen that the majority of online education tools are targeting high school users in preparation for their critical gaokao examination, which supports the data in the market share chart referred to above.

All of the tools can be used in businesses. They help businesses upgrade and reskill their employees. The online educational platform works for adults and professionals who have to balance both work and school. With the online education system, employees can learn at their own pace and in their own space. Overall, more and more tools exist that cater to the needs of employees and there is a wide range of alternatives for businesses to adopt.

³ http://en.wikipedia.org/wiki/Distance_education

⁴ <http://en.wikipedia.org/wiki/Connectivism>

Table 1

Types	Age Group					
	Kids				University Level 18 and above	Professionals
	Pre-school	Elementary School 6-12	Middle School 12-14	High School 15-17		
1-1 Tutoring	Education First, Hujiang	Education First, Hujiang, Tutor Group, XDF, Xueda, Xueersi	Education First, Hujiang, Global Education, Longman Schools, Tutor Group, XDF, Xueda, Xueersi	Education First, Global Education, Hujiang, Longman Schools, Tutor Group, XDF, Xueda, Xueersi	Edu24OL, Hujiang, Global Education, Tutor Group, XDF	Edu24OL, Hujiang, Global Education, Tutor Group
Chatting Platform		Hujiang, Longman Schools	Education First, Hujiang, Longman Schools, Tutor Group	Education First, Hujiang, Longman Schools, Tutor Group	Edu24OL, Education First, Hujiang, Tutor Group, Wall Street English	Edu24OL, Education First, Hujiang, Tutor Group, Wall Street English
Educational Games	ALO7, SmarTots	ALO7, Longman Schools, SmarTots,	Education First, Longman Schools	Longman Schools		
Video Clips	ALO7, SmarTots, Hujiang, Education First	ALO7, Education First, Global Education, Hujiang, Longman Schools, SmarTots, YY	Education First, English First, Global Education, Hujiang, Longman Schools, YY	Education First, English First, Global Education, Hujiang, Longman Schools, YY	Education First, Global Education, Hujiang, Wall Street English, YY	Education First, Global Education, Hujiang, Wall Street English, YY
Mobile	ALO7, SmarTots	ALO7, Hujiang, SmarTots, Longman Schools, Quizlet, Xueersi	Hujiang, Tutor Group, Quizlet, Xueersi	Education First, Hujiang, Global English, Tutor Group, Quizlet, Xueersi	Edu24OL, Education First, Global English, Hujiang, Tutor Group, Quizlet	Edu24OL, Education First, Global English, Hujiang, Tutor Group, Quizlet
Online Tests		AI07, Hujiang, XDF, Quizlet	AI07, Hujiang, XDF, Quizlet	Global Education, Global English, Hujiang, Quizlet, XDF	Edu24OL, Global Education, Global English, Hujiang, Quizlet, Wall Street English	Edu24OL, Global Education, Global English, Hujiang, Quizlet, Wall Street English
MOOC		YY	Global Education, YY	Global Education, YY	Global Education, YY	Education First, Global Education, Global English, YY
Blended Learning (O2O Model)		ChinaEdu, XDF, Xueda, Xueersi	ChinaEdu, XDF, Xueda, Xueersi	ChinaEdu, Global Education, XDF, Xueda, Xueersi	ChinaEdu, Edu24OL, Global Education	ChinaEdu, Edu24OL, Global Education

2.3 Major companies

There is immense competition in China's online education market. There are both local and foreign companies actively competing with one another to gain a larger market share. The competitiveness of the market boosts the development and attractiveness of the online education offering.

2.3.1 Local companies

Some of the active local players in the online education market are New Oriental, Xueda, Xueersi and Hujiang. Traditional institutional centres such as New Oriental, which have been in the educational sector for decades, have also shifted their business online. The group now functions as both an offline and online institutional centre. Mr Yu, chairman of New Oriental Education & Technology Group, mentioned in a recent forum that online education would account for 40% of the private education market in three to five years.

New Oriental is a booming educational centre with an online network of over 8.8 million registered users. In 2013, New Oriental made USD 1 billion (EUR 747 million)⁵ in revenue and had USD 3.7 billion (EUR 2.7 billion) in market capital. The main pillar for their education model lies in teaching professional English to children and adults and also in helping to prepare students for tests. Their online portal is tailored more for students in high school and above. They also have classes designed for professionals. The centre provides tests to gauge the student's language level before working out a course structure that is directed at the student's need. Most of these courses are English language learning courses, which is one of the most popular courses for adults in China. With enrolment in their offline classes, one is also entitled to a few free online tutorials.

Xueersi, an online educational centre under the TAL Educ Group, has a sophisticated O2O model that focuses on university students and test preparation. The target audience online is children above first grade, above six years old. With Xueersi, you can take classes online whenever you want and ask questions through their easily navigable online platform. There is also a choice in choosing your preferred teacher and microblogs providing more details about teachers are easily accessible online too. Also for the online courses, you get a free trial before having to pay for either an annual, half-year or per course top-up card model. This gives students the opportunity to try out before purchasing, a bonus experience for them. When students buy one semester of offline classes, Xueersi will give them an online one-to-one tutoring lesson as a trial. Such a business model connects Xueersi's offline and online classes and allows the company to maximise its business opportunities. Xueersi has 860,000 users and has generated USD 300 million (EUR 224 million) in revenues, USD 60 million (EUR 45 million) in net profit and USD 1.7 billion (EUR 1.3 billion) in market capital, amounting to a large share of China's online education sector.

2.3.2 Foreign companies

International firms such as **Pearson**, a European firm, and also **McGraw-Hill Education**, a North American firm, are eyeing the Chinese online education scene as well. Mark Dorman, the president of McGraw-Hill Education's international division recently indicated, "We've got a lot of really great initiatives going on in China," and that the company's work in China was 'at the core of their

⁵ The exchange rate used in this report: 1 USD = 0.7467 EUR

international strategy'. The potential of the Chinese online education sector and the sheer size of its market have attracted many foreign education providers.

Pearson, an educational provider that has been dominant in the United States, has four small companies registered in China that are receiving an overwhelming response from the Chinese general public. The companies have both online and offline methods for distributing their educational resources. The companies listed under Pearson are namely Wall Street English, Longman Schools, Global Education and Global English.

Longman Schools is an online self-learning centre and its main audience is children, primarily aged 6-16. They have learning software that includes functions such as video streaming, game-based activities and online quizzes that can be monitored by parents. There are teachers assigned to each student and the teachers are able to view the student's progress online, answer any questions and comment on the work. This model provides a connection for parents to their child's learning progress.

Global Education is a company specialising in IELTS test preparation. They offer a blended learning approach. It comes as a bundle that provides students with both online and offline courses. According to research on Global Education, such a blended learning approach increases the overall efficiency of learners. They have YY-like services, video streaming with a class size of around 100 and a massive open course with more than 1,000 participants in each lesson. The fourth company owned by Pearson that has gained significant market share in China is Global English, which is used solely by corporate firms. Global English worked with www.chinaed.com and later with Fesco after entering the Chinese market. They have cloud-computing technology and a blended software that is used for global enterprises. Global English also offers solutions for increasing the average standard of business English in a company as a whole.

2.4 Key trends

2.4.1 Main features of online education products and services



The diagram above shows the eight main features in the development of online education products and services. They are: shorter time, media-driven, being social, on-demand, blended learning, mobile, gamification and big data. Firstly, with online education students can learn more quickly. It only takes two to 15 minutes for a student to learn something compared to 30 to 120 minutes in an offline environment. Secondly, online education leads to increased use of audio and videos. Students will also be able to be social by collaborating and sharing ideas with others and online education is personalised to each student's needs. All these key points help build a student's skills in a quick and efficient way. Some online education has begun to blend offline and online learning. Students can study using their mobile devices, making learning available whenever and wherever. Mobile devices, especially Android phones, are hugely popular in China. People can be found using their mobile devices everywhere they go.

Online education makes what is a chore into something students would want to do. Students can use simulations and games for more realistic business-driven situations. Finally, online education makes it possible to observe how individuals are learning by using a learning management system. The results of the online education are measurable and allow students to see what is working and what is not.

2.4.2 Increasing investment in online education market

As reported in Technode China, before 2010 only a handful of Chinese online education companies received investment. The same report found that since 2011, with the explosion of the US online education market, about 10 Chinese online education companies have received angel investment, even though the amount is insignificant compared with the investment in their US peers, which easily exceeded USD 1 billion (EUR 747 million) over the same period, according to Deloitte. The online education market in China is continuing to boom. It was worth CNY 60 billion (EUR 7.25 billion) in 2011 and it is estimated to have hit CNY 72.3 billion (EUR 8.74 billion) in 2012.

Since 2011, 11 Chinese education enterprises have listed in America, including China Education, New Oriental, Xueersi and Xueda. Most of these education enterprises have opened their platforms to online education. As of December 2013, eight of the US-listed Chinese education companies, including New Oriental, had a total market capitalisation of USD 7.698 billion (EUR 5.75 billion). This is a 29.53% increase from USD 5.493 billion (EUR 4.1 billion) in December 2012.

New Oriental Education's online platform Koolearn was founded 10 years ago and has seen its revenue increase 50% over the last six years. According to the company's CEO, profit margins are higher than those of offline classes. Huijiang, a language-learning site founded in 2001, claimed to have generated CNY 100 million (EUR 12 million) in revenue this year from its 15 million registered users.

2.4.3 Big online players moving into education

Because online education is a new frontier for education and a lucrative market, it has also attracted big Chinese technology companies such as Tencent and Alibaba. These companies are trying to grab a share of the online education business. For example, Alibaba's Taobao developed an online platform known as 'Taobao Xuetang' to promote and sell online education tools and packages.

3 Online education for business

Employers in China are increasingly seeing the need to upgrade their employees' skills and also tailor courses to the standard of their employees, not only to increase productivity but also to increase retention. At the same time, employee schedules are getting busier, so finding the time to get them to a training centre to take a course is getting more difficult. Employers are therefore looking more to online platforms to replace the role of offline schools.

3.1 E-learning programs for employees

Chinese businesses are beginning to use online tools to train their employees. Some of the advantages for the employer are reduced impact on productivity, reduced costs and uniformity. Using online tools reduces productivity costs because employees do not have to leave and are available if needed. The employer does not have to pay for travel, lodging or a daily allowance. Also, all employees are given the same education, even in geographically scattered companies.

With technology expanding and becoming necessary in the workplace, an online degree is becoming more acceptable. Employers are noticing that people may not have time to attend school but are motivated and determined to learn and enhance their skills. An online degree shows that the professional is able to work, get an education and apply the new knowledge at work.

3.2 Continuing education platforms for professionals

Online education is a good fit for professionals who mostly do not have the free time to go to school due to work responsibilities. The importance of staying afloat in our competitive society requires professionals to keep learning and honing or upgrading the skills required for their jobs.

One popular use of online education among professionals is learning a language such as English. According to the survey of English First, a foreign online education company, 75% of the respondents believe that English can help them get a better job, 87% believe it is a requirement for achieving a higher salary, 82% believe it can open up new career opportunities, whereas 95% believe English will help them understand other cultures better and 92% believe it will make them a more charming person.

4. Conclusion

China's online education market is growing fast driven by the Internet boom and the Chinese families' increasing investment in education. Majority of the users in China are professionals. Preparing for exams and improving professional skills are the two primary reasons for using online education tools. Among many different tools available in the market, MOOC (Massive Open Online Course) and video streaming appear to be the most popular among the Chinese users.

Online education is also increasingly recognised by businesses as a means to train and retain their staff in China. Online portals facilitate scaling and engagement, integrated learning and provide measurable results for employers to weigh and monitor their employees' learning progress. The EU SME Centre's survey shows that the top two reasons for companies to use online tools in China are developing training programs for employees and recruitment.

In this context, China's online education market has attracted both local and international companies, and big companies like Tencent and Alibaba have also showed interest and made investment. With the development of new technologies and growing number of users, more niche markets are foreseen to emerge, which present opportunities for European SMEs with relevant know-how.

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The EU SME Centre assists European SMEs to export to China by providing a comprehensive range of free, hands-on support services including the provision of information, confidential advice, networking events and training. The Centre also acts as a platform facilitating coordination amongst Member State and European public and private sector service providers to SMEs.

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The Centre's range of free services cover:

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- Standards – standards and conformity requirements when exporting to China
- HR and Training – industry and horizontal training programmes
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- Hot-desking – free, temporary office space in the EU SME Centre to explore local business opportunities
- Any other practical support services to European SMEs wishing to export to or invest in China.

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