

# China Adult Learning Market: Analysis By Type (Individual Adult Learning and Enterprise Professional Training), By Format (Offline and Online), By Size and Trends with Impact of COVID-19 and Forecast up to 2029

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## Abstracts

Adult learning refers to educational programs tailored for adults seeking continuous personal or professional development. Adult learning offers a range of programs, including vocational training, continuing education, professional development courses, and higher education tailored to adult learners' needs. It addresses the evolving demands of a workforce seeking to upgrade skills, change careers, or stay current in rapidly evolving industries. The China adult learning market encompasses provision of a wide range of activities, programs, and courses designed to meet the learning needs of adults, including professional development, skills enhancement, career advancement, & personal enrichment. The China adult learning market value stood at US\$97.92 billion in 2023, and is expected to reach US\$195.67 billion by 2029.

Adult learning goes beyond the standard courses offered to prepare for degrees or diplomas granted by any education regulatory body; rather, it encompasses the acquisition of knowledge or skills, professional training specific to any job profile, & personal development courses aimed at enhancing individual capabilities and well-being. China adult learning market demonstrated a consistent growth, primarily driven by rising demand for upgrading skills, increasing employer emphasis on continuous learning, rising demand for vocational training, large consumer base, increasing internet penetration, positive cultural shift towards valuing continuous learning and personal development, and increased demand for professional certifications & executive education programs for career advancement, etc. Furthermore, rapid globalization, rise of female entrepreneurs & professionals, increased emphasis on personal development,

rising number of online learning platforms, increasing government efforts to combat digital illiteracy, and ongoing improvements in internet connectivity, digital infrastructure, and the availability of affordable devices, etc., will continue to boost the growth of China adult learning market in the upcoming years. China adult learning market is expected to grow at a CAGR of 12.23% over the projected period of 2024-2029.

#### Market Segmentation Analysis:

**By Type:** The report provides the bifurcation of the China adult learning market into two segments based on type, namely, individual adult learning, and enterprise professional training. Individual adult learning is the largest and fastest growing segment of China adult learning market owing to rising awareness of the concept of lifelong learning, increasing demand for personalized learning courses and programs, growing cultural emphasis on continuous self-improvement, provision of wide course offering with diversified topics, increasing external forces encouraging adults to remain competence through continual learning, and increasing efforts of Chinese government in promoting adult learning. Enterprise professional training market is expected to positively grow in the forecasted period driven by increasing awareness on providing enterprise professional training to meet ever changing business environment, rising focus of companies on increasing work efficiency, rise in enterprise budget on professional trainings, positive shift towards remote work, and rising competition among organizations.

**By Format:** The report provides the bifurcation of the China adult learning market into two segments on the basis of format: online and offline. The offline is the largest segment of China adult learning market owing to increasing cultural preference for traditional face-to-face interactions, growing preference for strong reputations and trust associated with established offline institutions, increasing government policies and support for traditional education systems, and added benefits of offline learning in terms of practical skills training, hands-on practice, personalized feedback, networking and relationship-building opportunities, etc. Online is the fastest growing segment of China adult learning market as a result of rapidly growing internet user base, thriving entrepreneurial spirit among youngsters, widespread adoption of smartphones, cultural shift towards valuing lifelong learning and continuous skill development, increasing number of online learning platforms in the region, and added benefits of cost-effectiveness, diverse and accessible course offerings, flexibility, and convenience associated with online learning.

In addition, China enterprise adult professional training market is also divided into two formats, namely, offline and online. Online is the fastest growing segment of enterprise adult professional training market as a result of increasing digitalization, rising prevalence of remote work culture, growing popularity of mobile learning, and added advantages associated with online training in terms of flexible learning environments, diverse learning formats, cost-effectiveness, scalability, etc. Furthermore, the report also provides bifurcation of China individual adult learning market and China individual adult personal interest learning market by format, namely, online and offline.

**By Course Offerings:** The report provides bifurcation of the China individual adult learning market by course offerings into four types, namely, professional training, personal interest, language learning, and college test preparation. Professional training is the largest segment of China individual adult learning market as a result of globalization, increasing job competition among Chinese workforce, growing focus of individuals on career advancement and personal development, constantly evolving job market, easy availability of a wide range of high-quality professional training programs on both online and offline platforms, and China's rapid economic growth over the past few decades.

The report further provides bifurcation of the China individual adult personal interest learning market into five segments, namely, music learning, art and design learning, video editing learning, financial learning, and others. Music learning is the largest segment of China individual adult personal interest learning market as a result of increasing popularity of online music education platforms.

#### Market Dynamics:

**Growth Drivers:** The China adult learning market has been rapidly growing over the past few years, due to factors such as, rapid urbanization, rise in disposable income, rising internet penetration, industrial transformation, rising awareness for lifelong learning culture, increasing demand for upskilling and reskilling, etc. The cultural emphasis on continuous learning in China stems from deeply rooted societal values that prioritize self-improvement, career advancement, and personal development. Individuals perceive education as an ongoing journey rather than a finite phase, creating a perpetual demand for continuous learning opportunities irrespective of age or educational background. Also, as industries witness substantial transformations, individuals understand the necessity of adapting their skill sets to match the demands of these evolving sectors. Consequently, this demand for upskilling and reskilling initiatives is expected to serve as a significant growth driver, fostering a continuous and expanding

market for adult learning in China.

**Challenges:** However, the China adult learning market growth would be negatively impacted by various challenges such as stringent regulations, intense competition and quality standards, cyber security risks, etc. The stringent regulatory environment is characterized by demanding prerequisites set by authorities, requiring meticulous adherence to precise criteria. Obtaining and maintaining necessary licenses demands unwavering attention & strict compliance with intricate, evolving regulations. Companies must remain vigilant and agile to meet changing standards. Failing to do so risks standing and punitive measures like fines or disruptions. This dynamic regulatory landscape constantly challenges companies, demanding perpetual vigilance and adaptability to maintain operational stability in China's adult learning market.

**Trends:** The China adult learning market is projected to grow at a fast pace during the forecasted period, due to surge in online learning, customized and personalized learning, industry-integrated training, integration with emerging technologies, gamification and interactive learning, rise in senior adult learning market, rise of micro-credentials, emphasis on soft skills, expansion of diversified courses, etc. The increasing diversity of participants in the senior adult learning market indicates a growing awareness and interest among older adults in engaging in lifelong learning activities. As the government elevates the importance of senior adult learning, enterprises are anticipated to contribute to a multi-layered service offering system. Furthermore, the content of senior adult learning courses is expected to diversify, covering art, design, music, video editing, digital skills, and financial literacy. Therefore, the anticipated expansion of senior adult learning will continue to boost the growth of China adult learning market in the forecasted years of 2024-2029.

**Impact Analysis of COVID-19 and Way Forward:**

COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. Lockdown policies imposed by the government to prevent the spread of virus forced closure of educational institutions and training centers, causing immediate disruption of in-person adult learning programs and traditional classroom-based courses, workshops, and seminars.

Notwithstanding the challenges, the post-pandemic era unveiled ample of opportunities for China's adult learning landscape. By embracing technological innovations, nurturing a culture of lifelong learning, and aligning educational offerings with contemporary skill

demands, the sector stands poised to equip individuals and fortify the workforce's adaptability in an era of dynamic change and evolution.

#### Competitive Landscape:

China adult learning market is fragmented. This rapidly growing segment includes major players like Youdao, and New Oriental, as well as smaller niche platforms focusing on specific skillsets or subjects. The key players of the market are:

China Education Group Holdings Limited  
Youdao Inc.  
Strategic Education Inc.  
Hope Education Group Co., Ltd.  
Coursera, Inc.  
China East Education Holdings Ltd.  
New Oriental Education & Technology Group Inc.  
China Kepei Education Group Limited  
QuantaSing Group Limited  
LAIX Inc.  
Huijiang  
Xiaozhan Education  
iTutorGroup  
italki

QuantaSing has secured a dominant role in China's fragmented but rapidly expanding adult personal interest learning market. While QuantaSing primarily focuses on the individual segments, there's also burgeoning potential in the enterprise services segment, where businesses are increasingly investing in professional development programs for employees. As of June 2023, QuantaSing had approximately 94.3 million registered users. For individual adult learners, QuantaSing offers a plethora of online courses under multiple brands, including QiNiu, JiangZhen, and QianChi. The three brands collectively form a powerful triad that serves a wide range of educational needs while also driving significant business value.

## Contents

### 1. EXECUTIVE SUMMARY

### 2. INTRODUCTION

- 2.1 Adult Learning: An Overview
  - 2.1.1 Introduction to Adult Learning
  - 2.1.2 Benefits of Adult Learning
- 2.2 Adult Learning Segmentation: An Overview
  - 2.2.1 Adult Learning Segmentation
  - 2.2.2 Individual Adult Learning Segmentation

### 3. CHINA MARKET ANALYSIS

- 3.1 China Adult Learning Market: An Analysis
  - 3.1.1 China Adult Learning Market: An Overview
  - 3.1.2 China Adult Learning Market by Value
  - 3.1.3 China Adult Learning Market by Type (Individual Adult Learning and Enterprise Professional Training)
  - 3.1.4 China Adult Learning Market by Format (Online and Offline)
- 3.2 China Adult Learning Market: Type Analysis
  - 3.2.1 China Adult Learning Market: Type Overview
  - 3.2.2 China Individual Adult Learning Market by Value
  - 3.2.3 China Individual Adult Learning Market by Course Offerings (Professional Training, Personal Interest, Language Learning, and College Test Preparation)
  - 3.2.4 China Individual Adult Learning Market by Format (Online and Offline)
  - 3.2.5 China Enterprise Adult Professional Training Market by Value
  - 3.2.6 China Enterprise Adult Professional Training Market by Format (Online and Offline)
- 3.3 China Adult Learning Market: Format Analysis
  - 3.3.1 China Adult Learning Market: Format Overview
  - 3.3.2 China Offline Adult Learning Market by Value
  - 3.3.3 China Online Adult Learning Market by Value
- 3.4 China Enterprise Adult Professional Training Market: Format Analysis
  - 3.4.1 China Enterprise Adult Professional Training Market: Format Overview
  - 3.4.2 China Offline Enterprise Adult Professional Training Market by Value
  - 3.4.3 China Online Enterprise Adult Professional Training Market by Value
- 3.5 China Individual Adult Learning Market: Course Offerings Analysis

- 3.5.1 China Individual Adult Learning Market: Course Offerings Overview
- 3.5.2 China Individual Adult Professional Training Market by Value
- 3.5.3 China Individual Adult Personal Interest Learning Market by Value
- 3.5.4 China Individual Adult Personal Interest Learning Market by Segment (Music Learning, Art And Design Learning, Video Editing Learning, Financial Learning, and Others)
- 3.5.5 China Individual Adult Personal Interest Learning Market by Format (Online and Offline)
- 3.5.6 China Individual Adult Language Learning Market by Value
- 3.5.7 China Individual Adult College Test Preparation Learning Market by Value
- 3.6 China Individual Adult Learning Market: Format Analysis
  - 3.6.1 China Individual Adult Learning Market: Format Overview
  - 3.6.2 China Offline Individual Adult Learning by Value
  - 3.6.3 China Online Individual Adult Learning Market by Value
- 3.7 China Individual Adult Personal Interest Learning Market: Segment Analysis
  - 3.7.1 China Individual Adult Personal Interest Learning Market: Segment Overview
  - 3.7.2 China Individual Adult Music Learning Market by Value
  - 3.7.3 China Individual Adult Art and Design Learning Market by Value
  - 3.7.4 China Individual Adult Video Editing Learning Market by Value
  - 3.7.5 China Individual Adult Financial Learning Market by Value
  - 3.7.6 China Others Individual Adult Learning Market by Value
- 3.8 China Individual Adult Personal Interest Learning Market: Format Analysis
  - 3.8.1 China Individual Adult Personal Interest Learning Market: Format Overview
  - 3.8.2 China Offline Individual Adult Personal Interest Market by Value Learning
  - 3.8.3 China Online Individual Adult Personal Interest Learning Market by Value

## **4. IMPACT OF COVID-19**

- 4.1 Impact of COVID-19 on Adult Learning Market
- 4.2 Post COVID-19 Impact on Adult Learning Market

## **5. MARKET DYNAMICS**

- 5.1 Growth Drivers
  - 5.1.1 Rapid Urbanization
  - 5.1.2 Rise In Disposable Income
  - 5.1.3 Rising Internet Penetration
  - 5.1.4 Industrial Transformation
  - 5.1.5 Rising Awareness for Lifelong Learning Culture

- 5.1.6 Increasing Demand For Upskilling And Reskilling
- 5.2 Challenges
  - 5.2.1 Intense Competition and Quality Standards
  - 5.2.2 Cyber Security Risks
  - 5.2.3 Stringent Regulations
- 5.3 Market Trends
  - 5.3.1 Surge In Online Learning
  - 5.3.2 Customized and Personalized Learning
  - 5.3.3 Industry-Integrated Training
  - 5.3.4 Integration With Emerging Technologies
  - 5.3.5 Gamification and Interactive Learning
  - 5.3.6 Rise of Micro-credentials
  - 5.3.7 Emphasis on Soft Skills
  - 5.3.8 Expansion Of Diversified Courses
  - 5.3.9 Rise In Senior Adult Learning Market

## **6. COMPETITIVE LANDSCAPE**

- 6.1 China Adult Learning Market: Competitive Landscape

## **7. COMPANY PROFILES**

- 7.1 China Education Group Holdings Limited
  - 7.1.1 Business Overview
  - 7.1.2 Operating Segments
  - 7.1.3 Business Strategy
- 7.2 Youdao Inc.
  - 7.2.1 Business Overview
  - 7.2.2 Operating Segments
  - 7.2.3 Business Strategy
- 7.3 Strategic Education Inc.
  - 7.3.1 Business Overview
  - 7.3.2 Operating Segments
  - 7.3.3 Business Strategy
- 7.4 Hope Education Group Co., Ltd.
  - 7.4.1 Business Overview
  - 7.4.2 Operating Segments
- 7.5 Coursera, Inc.
  - 7.5.1 Business Overview



- 7.5.2 Operating Segments
- 7.5.3 Business Strategy
- 7.6 China East Education Holdings Ltd.
  - 7.6.1 Business Overview
  - 7.6.2 Operating Segments
- 7.7 New Oriental Education & Technology Group Inc.
  - 7.7.1 Business Overview
  - 7.7.2 Operating Segments
- 7.8 China Kepei Education Group Limited
  - 7.8.1 Business Overview
  - 7.8.2 Revenue From Contracts
  - 7.8.3 Business Strategy
- 7.9 QuantaSing Group Limited
  - 7.9.1 Business Overview
  - 7.9.2 Revenue By Business Line
  - 7.9.3 Business Strategy
- 7.10 LAIX Inc.
  - 7.10.1 Business Overview
  - 7.10.2 Business Strategy
- 7.11 Huijiang
  - 7.11.1 Business Overview
- 7.12 Xiaozhan Education
  - 7.12.1 Business Overview
- 7.13 iTutorGroup
  - 7.13.1 Business Overview
- 7.14 italki
  - 7.14.1 Business Overview

## 12. LIST OF FIGURES

- Figure 1: Benefits of Adult Learning
- Figure 2: Adult Learning Segmentation
- Figure 3: Individual Adult Learning Segmentation
- Figure 4: China Adult Learning Market by Value; 2019-2023 (US\$ Billion)
- Figure 5: China Adult Learning Market by Value; 2024-2029 (US\$ Billion)
- Figure 6: China Adult Learning Market by Type; 2023 (Percentage, %)
- Figure 7: China Adult Learning Market by Format; 2023 (Percentage, %)
- Figure 8: China Individual Adult Learning Market by Value; 2019-2023 (US\$ Billion)
- Figure 9: China Individual Adult Learning Market by Value; 2024-2029 (US\$ Billion)

Figure 10: China Individual Adult Learning Market by Course Offerings; 2023  
(Percentage, %)

Figure 11: China Individual Adult Learning Market by Format; 2023 (Percentage, %)

Figure 12: China Enterprise Adult Professional Training Market by Value; 2019-2023  
(US\$ Billion)

Figure 13: China Enterprise Adult Professional Training Market by Value; 2024-2029  
(US\$ Billion)

Figure 14: China Enterprise Adult Professional Training Market by Format; 2023  
(Percentage, %)

Figure 15: China Offline Adult Learning Market by Value; 2019-2023 (US\$ Billion)

Figure 16: China Offline Adult Learning Market by Value; 2024-2029 (US\$ Billion)

Figure 17: China Online Adult Learning Market by Value; 2019-2023 (US\$ Billion)

Figure 18: China Online Adult Learning Market by Value; 2024-2029 (US\$ Billion)

Figure 19: China Offline Enterprise Adult Professional Training Market by Value;  
2019-2023 (US\$ Billion)

Figure 20: China Offline Enterprise Adult Professional Training Market by Value;  
2024-2029 (US\$ Billion)

Figure 21: China Online Enterprise Adult Professional Training Market by Value;  
2019-2023 (US\$ Billion)

Figure 22: China Online Enterprise Adult Professional Training Market by Value;  
2024-2029 (US\$ Billion)

Figure 23: China Individual Adult Professional Training Market by Value; 2019-2023  
(US\$ Billion)

Figure 24: China Individual Adult Professional Training Market by Value; 2024-2029  
(US\$ Billion)

Figure 25: China Individual Adult Personal Interest Learning Market by Value;  
2019-2023 (US\$ Billion)

Figure 26: China Individual Adult Personal Interest Learning Market by Value;  
2024-2029 (US\$ Billion)

Figure 27: China Individual Adult Personal Interest Learning Market by Segment; 2023  
(Percentage, %)

Figure 28: China Individual Adult Personal Interest Learning Market by Format; 2023  
(Percentage, %)

Figure 29: China Individual Adult Language Learning Market by Value; 2019-2023 (US\$  
Billion)

Figure 30: China Individual Adult Language Learning Market by Value; 2024-2029 (US\$  
Billion)

Figure 31: China Individual Adult College Test Preparation Learning Market by Value;  
2019-2023 (US\$ Billion)

Figure 32: China Individual Adult College Test Preparation Learning Market by Value; 2024-2029 (US\$ Billion)

Figure 33: China Offline Individual Adult Learning Market by Value; 2019-2023 (US\$ Billion)

Figure 34: China Offline Individual Adult Learning Market by Value; 2024-2029 (US\$ Billion)

Figure 35: China Online Individual Adult Learning Market by Value; 2019-2023 (US\$ Billion)

Figure 36: China Online Individual Adult Learning Market by Value; 2024-2029 (US\$ Billion)

Figure 37: China Individual Adult Music Learning Market by Value; 2022-2029 (US\$ Billion)

Figure 38: China Individual Adult Art and Design Learning Market by Value; 2022-2029 (US\$ Billion)

Figure 39: China Individual Adult Video Editing Learning Market by Value; 2022-2029 (US\$ Billion)

Figure 40: China Individual Adult Financial Learning Market by Value; 2022-2029 (US\$ Billion)

Figure 41: China Others Individual Adult Learning Market by Value; 2022-2029 (US\$ Billion)

Figure 42: China Offline Individual Adult Personal Interest Learning Market by Value; 2022-2029 (US\$ Billion)

Figure 43: China Online Individual Adult Personal Interest Learning Market by Value; 2022-2029 (US\$ Billion)

Figure 44: China Urban Population As A Percentage Of Total Population; 2016-2022 (Percentage, %)

Figure 45: China's Disposable Income per Capita; 2016-2022 (US\$ Thousand)

Figure 46: China Internet Users; 2018-2023 (Million)

Figure 47: China Education Group Holdings Limited Revenue by Segments, 2023 (Percentage, %)

Figure 48: Youdao Inc. Net Revenues by Segments, 2022 (Percentage, %)

Figure 49: Strategic Education Inc. Revenues by Segments, 2022 (Percentage, %)

Figure 50: Hope Education Group Co., Ltd. Revenue by Segments, 2023 (Percentage, %)

Figure 51: Coursera, Inc. Revenue by Segment; 2022 (Percentage,%)

Figure 52: China East Education Holdings Ltd. Revenue by Segment; 2022 (Percentage,%)

Figure 53: New Oriental Education & Technology Group Inc. Net Revenues by Segment; 2023 (Percentage,%)

Figure 54: China Kepei Education Group Limited Revenue From Contracts; 2022  
(Percentage,%)

Figure 55: QuantaSing Group Limited Net Revenue by Business Line; 2023  
(Percentage,%)

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