

China Online Education Industry Report, 2014-2017

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Abstracts

The Chinese online education market attracted the inrush of huge capital in 2013-2014, as Internet firms, offline education training institutions, investment companies and startups continued their expansion in online education. In 2014, China online education industry is characterized as follows:

1. Online education is still an investment hot spot. In 2013, 51 investment events took place in China online education industry, 44 of which were venture investments. And the figure rose to 54 during Jan.-Aug, 2014, 10 of which (including acquisitions) occurred in Aug. 2014 alone, equaling total investment of over RMB 1 billion.
2. Education and teaching models are further improved. Koolearn's live classroom channel went online in Feb. 2014; Hujiang.com introduced mobile live classroom "CCTalk" in Aug. 2014; Super Class introduces teaching elements like film & TV, recreation and sports and game & animation, and adopts teaching model of "Flipped Classroom".
3. Technologies like multimedia-based information processing, big data, visualization, gamification, business intelligence, AR, 3D and situational interaction further integrates with education products and services. As far as content of courses is concerned, students' enthusiasm is stimulated by course gamification and situational interaction. Meanwhile, learning management system, through big data analytics with mass data gathered during teaching process, provides learners with interactional education and anytime, anywhere tailored learning experience, and keeps track of their progress.

At present, online education companies employing technologies like big data, visualization and business intelligence include Super Class, Hujiang.com, 17zuoye.com, etc. In Jul. 2014, kaikeba.com, an IT online education platform under Uniquedu, cooperated with IBM, applying IBM's big data and analytic techniques to develop series

courses on the platform.

4. Education institutions and IT companies endeavor to make layout in open education platform. Open platforms can not only charge tenant fees from course providers, share revenue after the courses are sold, and make profit from value-added services, presenting a bright lucrative prospects. Various education institutions, IT companies and startups have introduced open online education platforms.

By virtue of their web traffic advantage, IT firms have launched open online education platforms in succession. For example, in Jul. 2013, Alibaba introduced its education channel --Taobao Tongxue; In Apr. 2014, Tencent and Netease's Youdao released Tencent Classroom and Youdao Open Education Platform respectively; In Aug. 2014, Baidu purchased Chuanke.com for USD 30 million. To attract the settlement of education institutions (teachers), these platforms now don't charge tenant fees, nor share the gains from transactions.

5. Mobile devices capture attention of online education companies.

Compared with page learning, mobile products, integrating interest and gameplay, are easier to become popular among learners, be promoted and grab users.

In Jan. 2014, Baidu Knows introduced the APP named Zuoyebang (a platform for students to discuss schoolwork and exchange views on different topics), which was upgraded to 3.0 version in Sep. 2014; In May, 2014, Alibaba rolled out the APP Shisheng (a product for communication and interaction between parents and kindergartens, primary schools and junior/senior high school); In Jul. 2014, Tencent made layout in mobile product by establishing joint venture with New Oriental; Xingshuai Teach is developing a new APP, which is expected to be launched by the end of 2014.

6. New business models (O2O, MOOC, online interaction among teachers, students and parents) are mushrooming, but some profit models are unclear.

Currently, many education institutions are making layout in O2O, like New Oriental, which launched "New Oriental TV Classroom" through BesTV's IPTV in May, 2014, and Huijiang, which opened online education experience store "HJ Class Experience Center" in Jun. 2014. With regard to MOOC model, Tsinghua University launched xuetangX.com in Oct. 2013, and CnMooc under Shanghai Jiaotong University went live in Apr. 2014.

Among online education companies, Hujiang has a relatively mature business model and profit model. For the former, Hujiang has a fairly complete business model covering C2C+B2C+B2B2C, and for the latter, it earns profits from advertisement, E-commerce, online class and platform. By contrast, 17zuoye, an online platform for interaction and communications among teachers, students and parents, now provides all services for free, with working capital coming from financing and profit model being explored.

China Online Education Industry Report, 2014-2017 by ResearchInChina focuses on the following:

Overview of online education industry (covering definition, classification, industrial chain, educational media and tools, teaching/business/profit models);

Overview of education market (embracing relevant policies, education funds investment, education expenditure, number of schools and students, non-governmental education and market size of education training industry);

Online education market (including market status quo, global and China's investment and financing, size of overall and market segments, development trends)

Status quo, business model, enterprise financing, size and development prospects of market segments like online higher education, K-12 online education, online language training, online vocational & skill training, enterprise E-learning;

Profile, revenue, business structure, online education business, business & profit models and business strategies of 20 online education companies (including China Distance Education, New Oriental, Tomorrow Advancing Life, Super Class, Hujiang, TBC, etc.)

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