Language Learning in Digital Era

Research insights about current changes & trends

AHK G #PartnerForGreaterChina #PartnerForInnovation

OVERVIEW

ONLINE EDUCATIN MARKET IN CHINA

Total market size

¥

322 bn RMB (2019)

Increase of **28%** within 1 year (2018 to 2019) future growth expected

Total internet users

904 mio. people (2020)

Online Education users

309 mio. people (2020)

LANGUAGE LEARNING MARKET IN CHINA

English studies
mandatory

↓

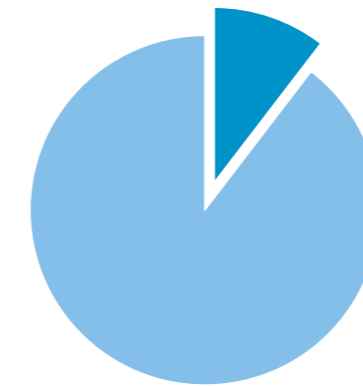**250+ mio.** people learn at least one foreign language

Trend
in promoting
**other
language-studies**

(Japanese, French,
German, Korean)

ONLINE LANGUAGE LEARINING MARKET IN CHINA

Online Market
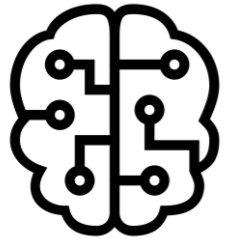
10,41% made up of

Online Education

Online Education

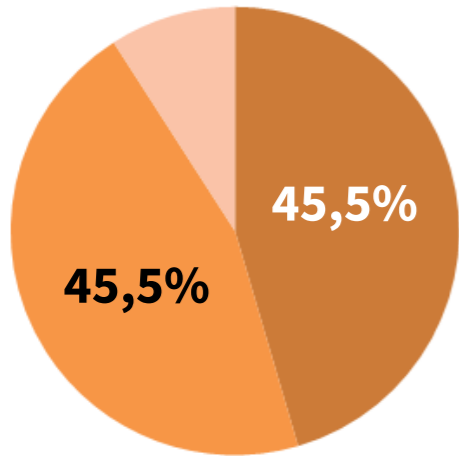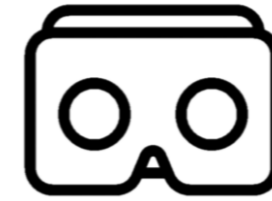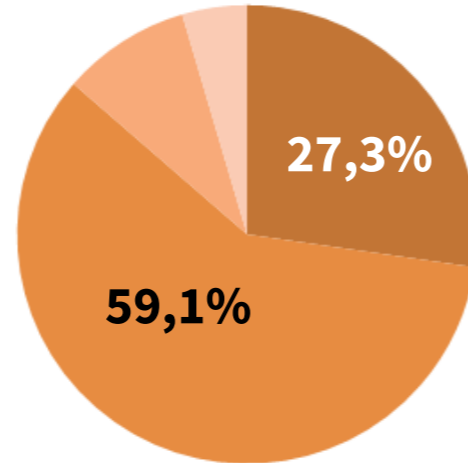**13,30%** made up of

Language Learning

RELATED TECHNOLOGIES

Importance for Online-teaching – evaluated by surveyed Start-ups

AI

Big Data

VR

AI pie chart: 45,5% / 45,5%

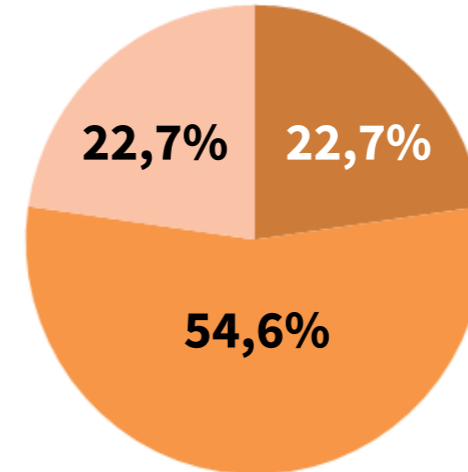Big Data pie chart: 27,3% / 59,1%

VR pie chart: 22,7% / 22,7% / 54,6%

Legend:
- very important
- rather important
- normal
- rather unimportant

EDUCATION START-UPS

Global Unicorn Index 2020 ranking

- 20 education start-ups, 10 from China

- 7 related to language learning

- AI & Big Data as basic technology
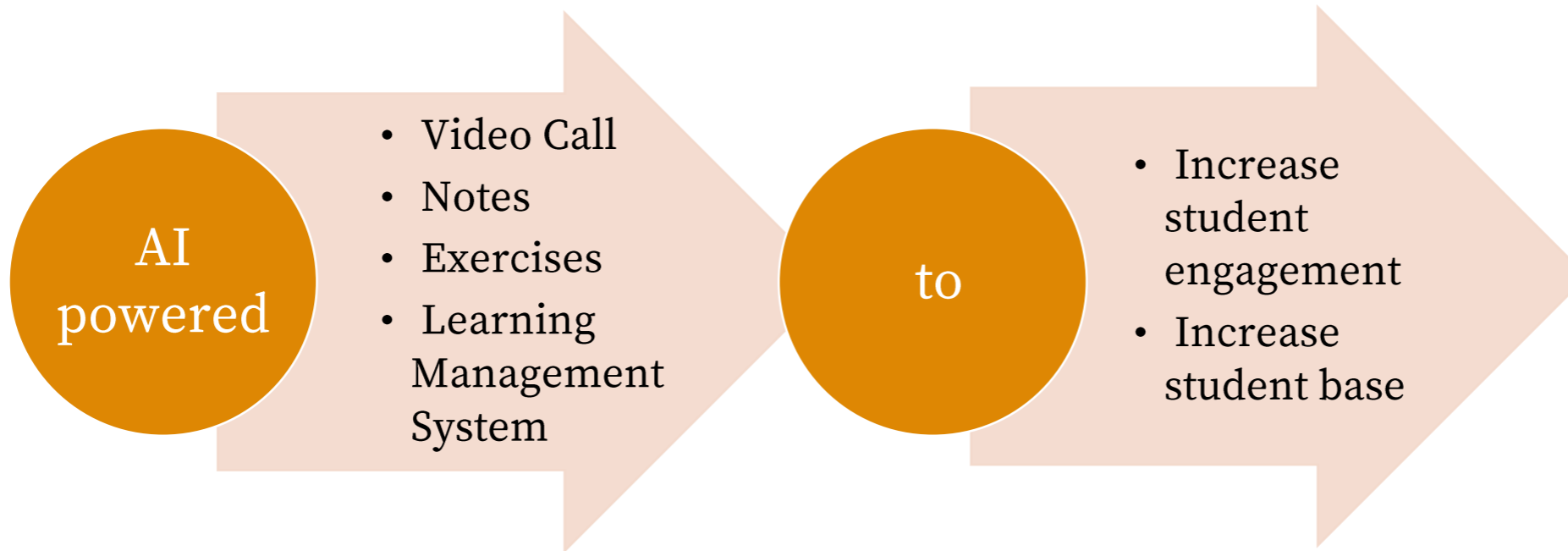
LANGUAGE LEARNING START-UP:

edugo.ai

Use AI to reshape and enhance the human interaction which is at the core of language learning

AI powered

- Video Call
- Notes
- Exercises
- Learning Management System

to

- Increase student engagement
- Increase student base

AHK

LANGUAGE LEARNING START-UP:

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LANGUAGE LEARNING START-UP:

LANGUAGE LEARNING START-UP:

Learn a language by chatting with native speakers around the world for free

Worldwide Community
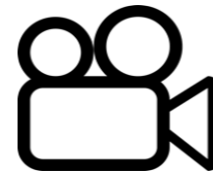
Text, Voice & Video

Intuitive Language Tools

Moments

LANGUAGE LEARNING START-UP: HelloTalk
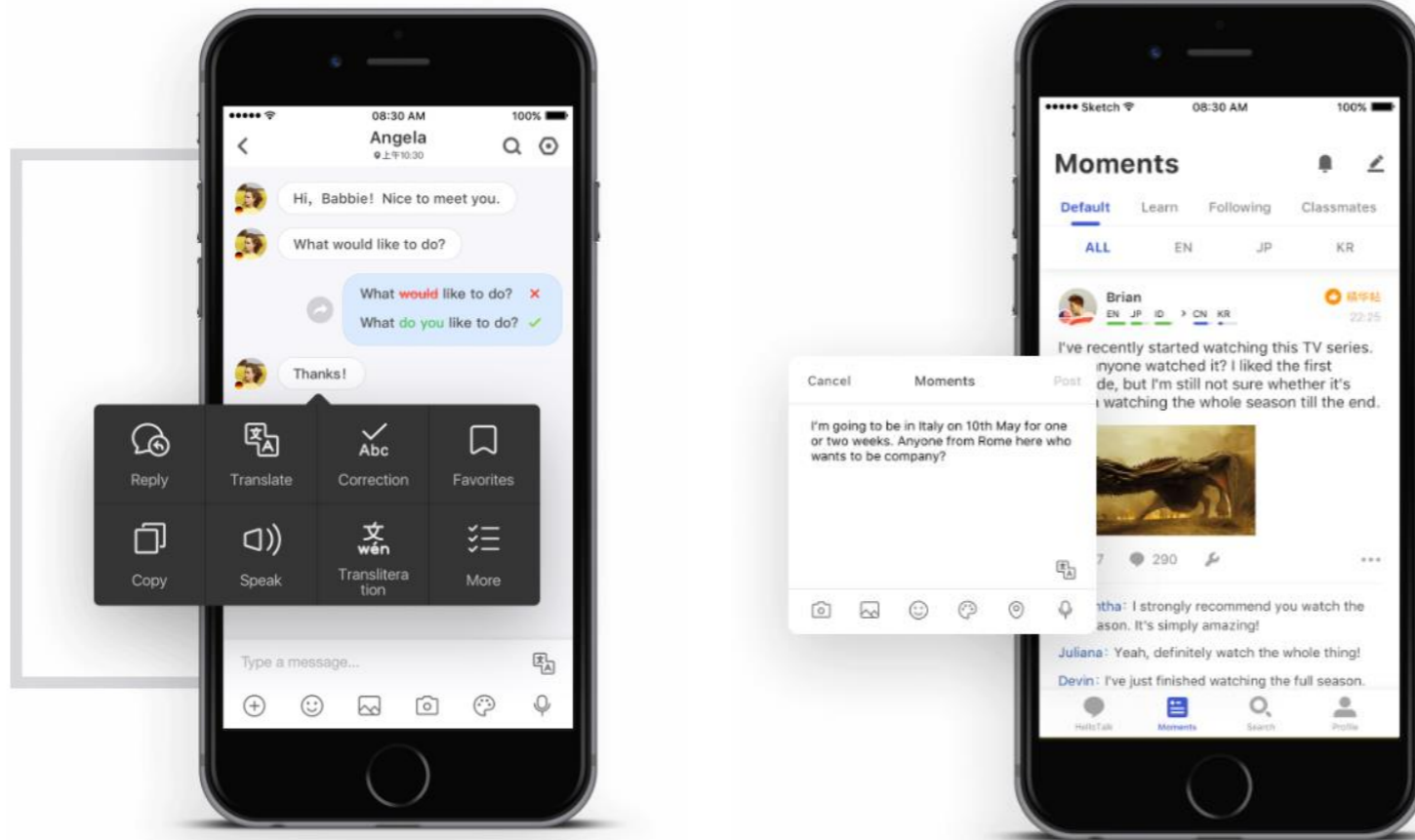
THE INFLUENCE OF COVID-19

Offline-education institutions' assessment of their businesses during pandemic

Chart axis labels (y-axis): 600, 500, 400, 300, 200, 100, 0

Categories (x-axis):
- very strong negative influence, almost went bankrupt
- very strong negative influence, business temporary closed
- strong negative influence, business continued
- moderate negative influence, rather stable situation
- almost no negative influence on business
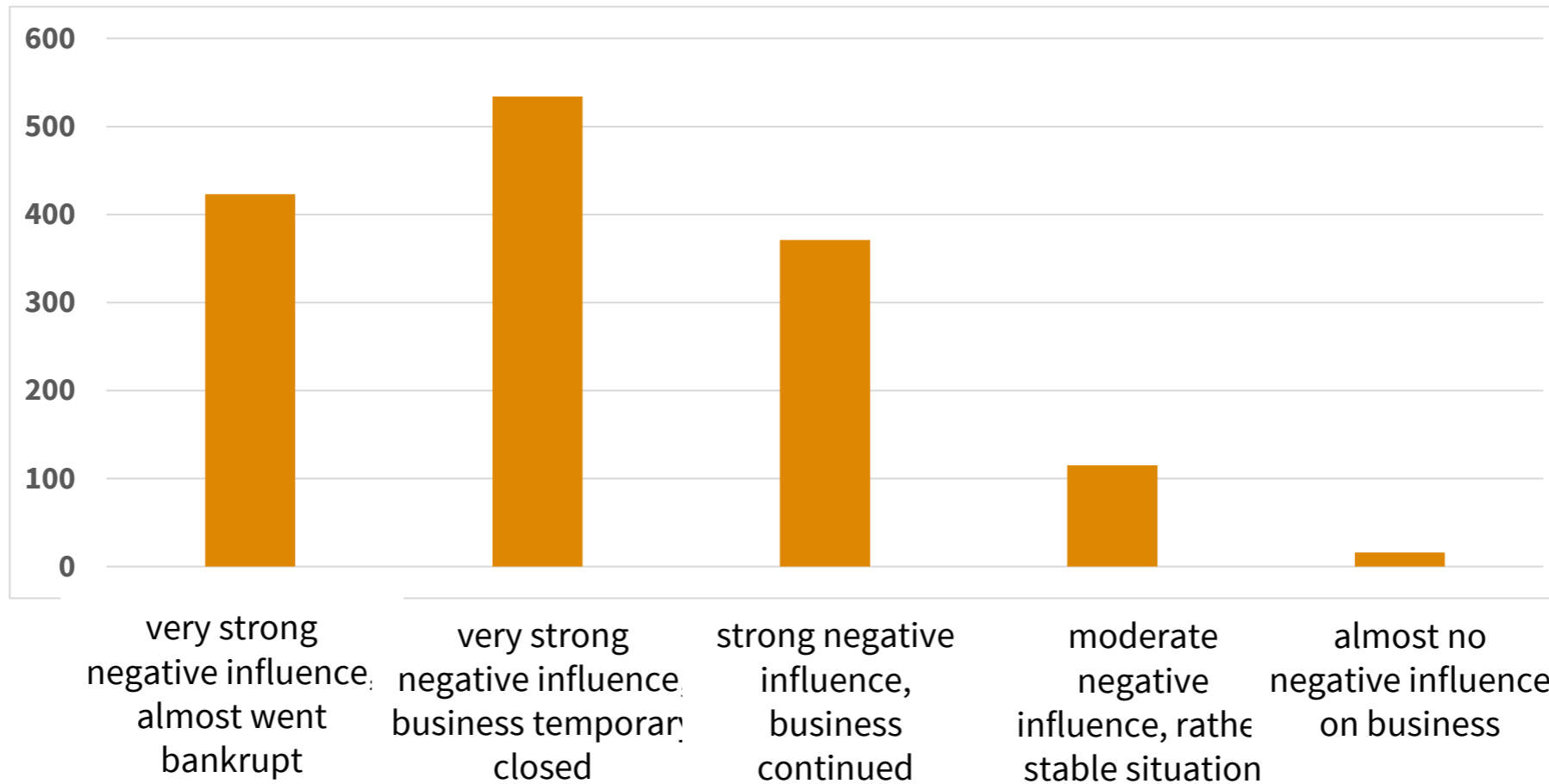
THE INFLUENCE OF COVID-19

- Strong negative impact on traditional education

- Customer boom for online-education providers

- New business models, like O2O appeared

- Digitalization process in education accelerated

- Massively reduced interest in studying abroad

SUMMARY

- Optimistic view on development

- Crisis showed value & necessity of online-offers, but also need to improve

- High potential for new business models

- Traditional education realized need for improvement to sustain business

OUTLOOK

- Increased use of technology in language learning

- Combination of offline & online education

- Stable user increase expected also after crisis

CONTACT INFORMATION

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FOR FURTHER QUESTIONS REGARDING:

- Chinese start-up scene
- Innovation job fair
- Innovation nights
- Connecting corporates & start-ups

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Or visit our website: www.ahk.de

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Resources (ordered by slides)

1. https://static.voices.com/wp-content/uploads/2019/06/MR-3025-online-learning-vs-traditional.jpg

2. https://education.jhu.edu/wp-content/uploads/2020/05/JimDiamond_profile.jpg

3. (1) https://static.thenounproject.com/png/485649-200.png (2) https://www.tuktukdesign.com/wp-content/uploads/2020/01/people-icon-vector.jpg (3) iResearch (2020): 中国在线教育市场数据发布报告(China Online Education Market Data Release Report). S.4. (4) http://www.cac.gov.cn/2020-04/27/c_1589535470378587.htm (5) iiMedia Research (2018): China'sOnline Education Industry Development Research Report (2019-2020)

4. (1) https://mbcmc27n7s3en3e22s6bb816-wpengine.netdna-ssl.com/wp-content/uploads/2016/01/tips-for-learning-a-foreign-language2.jpg (2) Ministry of Education of the People's Republic of China (2020): 教育部关于印发普通高中课程方案和语文等学科课程标准（2017年版2020年修订）的通知

5. (1) https://images.theconversation.com/files/195198/original/file-20171117-7588-1rai1rs.jpg?ixlib=rb-1.1.0&q=45&auto=format&w=926&fit=clip (2) Deloitte (2018): China Education Development Report 2018. S.3.

6. (1) https://icon-library.com/images/icon-artificial-intelligence/icon-artificial-intelligence-29.jpg (2) https://www.pngitem.com/pimgs/m/117-1171266_mind-map-icon-big-data-icon-png-transparent.png (3) https://banner2.cleanpng.com/20180401/xxw/kisspng-virtual-reality-headset-oculus-rift-samsung-gear-v-vr-headset-5ac1148814e539.6813968515226031440856.jpg

7. see slide 6

Resources (ordered by slides)

8. (1) https://static.wixstatic.com/media/e8ca26_7a8da6add8b84e4793ec7610bf180df4~mv2.png (2) http://feng.ifeng.com/c/7yeh7hReeXh (3) https://1635225677.rsc.cdn77.org/images/Yuanfudao.jpg (4) https://upload.wikimedia.org/wikipedia/en/8/8a/VIPKID_Logo.png (5) https://transform-img.iyiou.com/d6d031678c31fe9e344fd3037a1abebd.jpg (6) https://res-4.cloudinary.com/crunchbase-production/image/upload/c_lpad,f_auto,q_auto:eco/v1466180186/h98b7vdt7sib7mv2yj2h.jpg (7) https://s3-eu-west-1.amazonaws.com/dealroom-images/28/MTAwOjEwMDpjb21wYW55QHMzLWV1LXdlc3QtMS5hbWF6b25hd3MuY29tL2RlYWxyb29tLWltYWdlcy8yMDE5LzAyLzA1LzhlZjQzODQ3MmQyZTY3OTExZTA5ZGFhZGU0ZjkyOTM3.png (8) https://res-5.cloudinary.com/crunchbase-production/image/upload/c_lpad,h_256,w_256,f_auto,q_auto:eco/qsynvs5vo4d490bee4g7 (9) https://www.bertelsmann-investments.com/fileadmin/_processed_/b/f/csm_KNOWBOX_0891d4797f.png
 9. (1) https://cdn-images-1.medium.com/max/1200/1*aJCcxskwo0N7gCtsHbsOmA.png (2) https://www.edugo.ai/
10. see slide 9
11. see slide 9
12. see slide 9
13. (1)https://blog.inspiremekorea.com/wpcontent/uploads/2016/07/hellotalk.png (2) https://static.thenounproject.com/png/2174914-200.png (3) https://static.thenounproject.com/png/24074-200.png (4) https://icon-library.com/images/video-camera-icon-png/video-camera-icon-png-0.jpg (5) https://static.thenounproject.com/png/2174914-200.png
14. (1) https://blog.inspiremekorea.com/wp-content/uploads/2016/07/hellotalk.png (2)https://www.hellotalk.com/?lang=en

Resources   (ordered by slides)

15. The China Association for Non-Government Education (2020): 疫情期间培训教育行业状况调研报告(Research report on the state of the training and education sector during the pandemic)

16. https://headsetplus.com/blog/wp-content/uploads/2020/07/distance-learning.jpg

17. https://static.voices.com/wp-content/uploads/2019/03/MR-3017-industry-elearning-1.jpg

18. https://media.geeksforgeeks.org/wp-content/cdn-uploads/20200703110559/10-Tips-For-Students-Who-Are-New-To-Online-Learning.png

For other resources please refer to our market study.