

IDC: Fast-Growing Online Education Market Boosts Education Tablets

Beijing, April 28, 2020 – With the deepening implementation of measures against the COVID-19 epidemic and of the Ministry of Education’s policy of “postponed school opening” and “no stoppage of learning despite school closure”, students of all grades across China have moved their classrooms online and studied at home. With the rapid development of the online education market, demand for tablets, projectors, printers and other related terminal devices has increased dramatically. According to IDC's monthly retail data tracker, online sales of tablets were up by nearly 100% year-on-year in February 2020 and continued to grow at almost 50% in March. In addition to the rising sales of ordinary tablets, those of education tablets are also booming.

Definition of Education Tablet:

Education tablets are tablets for K-12 education users, which are equipped with manufacturers’ self-developed or third-party educational resources, have control on the installation of entertainment apps, and mainly serve the purpose of education.

Figure 1



IDC’s Definition of Education Tablet

Target Users	Built-In Resources	Application Control	Purpose of Use
<ul style="list-style-type: none"> • K-12 education users 	<ul style="list-style-type: none"> • Manufacturers' self-developed or third-party education resources 	<ul style="list-style-type: none"> • Control over installation of entertainment apps 	<ul style="list-style-type: none"> • Mainly serve educational purposes

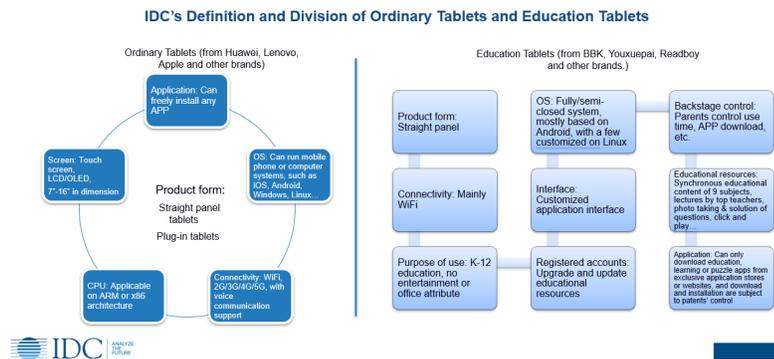
Source: IDC China, 2020

Differences Between Education Tablets and Ordinary Tablets:

Education tablets are a type of ordinary tablets. Their hardware configuration is basically the same as that of

ordinary tablets, but they are different in software application and built-in resources. Compared with ordinary tablets, educational tablets have no entertainment and office attributes and do not allow the installment of entertainment apps. Users can only download relevant education and learning apps or puzzle apps from exclusive app stores or websites. Leveraging rich educational resources and related education applications embedded in advance by manufacturers, education tablets have become a special tool for education and learning.

Figure 2

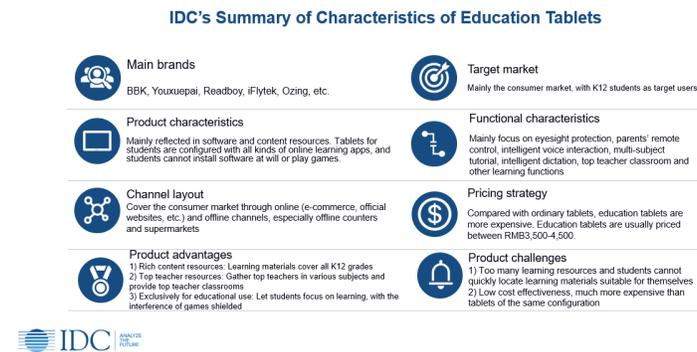


Characteristics of Education Tablets:

Education tablets mainly target K-12 student users in the consumer market. They attract parents and student groups through their rich learning resources and learning functions, meaning that they are more suitable for family learning scenarios. Rich educational content and resources also

highlight the specific attribute of education of these tablets. Compared with ordinary tablets, education tablets do not allow students to install software at will or play games, and parents' backstage control is stricter. In addition to the hardware per se, educational tablets also provide integrated educational contents and applications, thus more expensive. Online sales channel for education tablets mainly include the official flagship stores opened on leading e-commerce platforms. Offline channels are chiefly supermarkets, bookstores, franchise stores and value-added service experience stores. Compared with the case of ordinary tablets, parents are more inclined to experience and purchase education tablets offline.

Figure 3



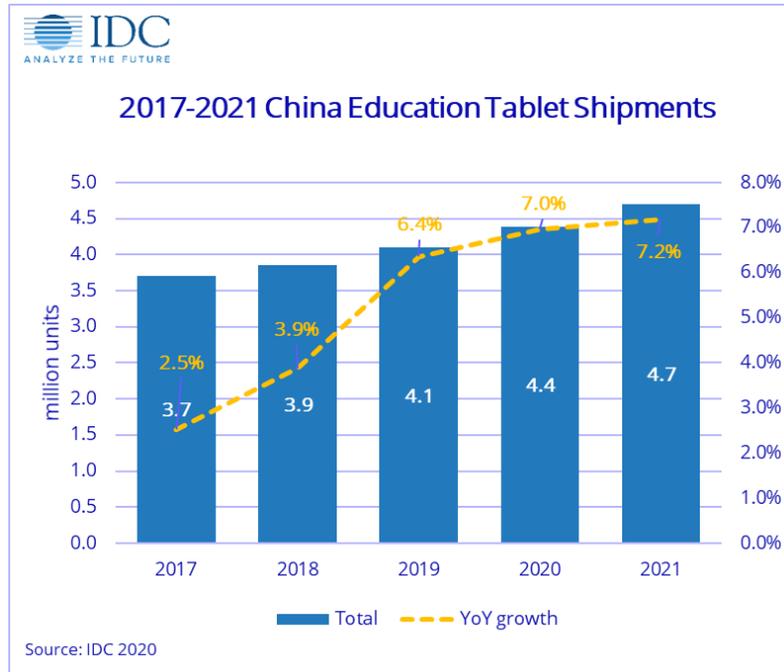
Given the above differences between education tablets and ordinary tablets and their own characteristics, IDC has not included education tablets in its quarterly tablet shipment tracker.

Current Situation of the Education Tablet Market:

According to IDC's tracking and monitoring data, China's education tablet market has shown a continuous growth trend: shipment reached approximately 4 million units in 2019. The figure is expected to approach 4.4 million units in 2020 and reach 4.7 million units in 2021. Compared with the declining shipment of ordinary tablets, education tablets enjoy more stable growth in demand. In particular, despite the relatively big impact on offline channels during the COVID-19 epidemic, education tablet sales have still maintained growth. Unlike ordinary tablets, educational tablets are a kind of product with strong seasonal demand, with clear rises in shipment during winter and summer vacations, while stable in other times.

Mainstream education tablet brands include BBK, Readboy, Youxuepai, Subor, Ozing and iFLYTEK. Among them, BBK has the biggest market share, thanks to its core advantages in education resources and long-term brand influence. Following years of market accumulation, unique and rich educational resources, long-term channel layout and numerous marketing promotion activities, BBK has established its leadership in brand influence and market share and firmly won the mind and soul of many parents.

Figure 4



IDC will launch a quarterly shipment tracker on the education tablet market:

The COVID-19 epidemic which broke out at the beginning of 2020 is still spreading around the world, which has pushed online education onto the fast lane of development, thus driving personal consumers' purchase demand for tablets and other terminal devices. Compared with ordinary tablets, the massive built-in educational resources in the education tablets can be a good assistant in terms of homework guidance, online Q&A, knowledge search and so on, so that students can effectively complete their learning tasks at home. The strict background control system can also help parents to effectively

and reasonably supervise their children's use of education tablets.

The COVID-19 epidemic will be gradually brought under control. However, the application of the online learning model during the epidemic period, the promotion of state policies and the development of "Internet plus education" and "intelligence + education" mean that online education will become an important opportunity for the future education market. It will boost the release of demand for tablets, especially education tablets in the long term. Recently, Lenovo, Huawei and other vendors have successively launched new ordinary tablet products for education users, focusing on online courses and embedding rich educational resources in them.

Therefore, as online education gains growing popularity and all sectors pay more attention to the education market, user demand for education tablets is also rising. There will be intensifying competition between ordinary tablets targeting education users and education tablets. IDC will officially launch a quarterly shipment tracker on China's education tablet market in the third quarter of 2020. Users with demand may contact us. In the meantime, please stay tuned.

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About IDC Tracker

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Figure 5



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