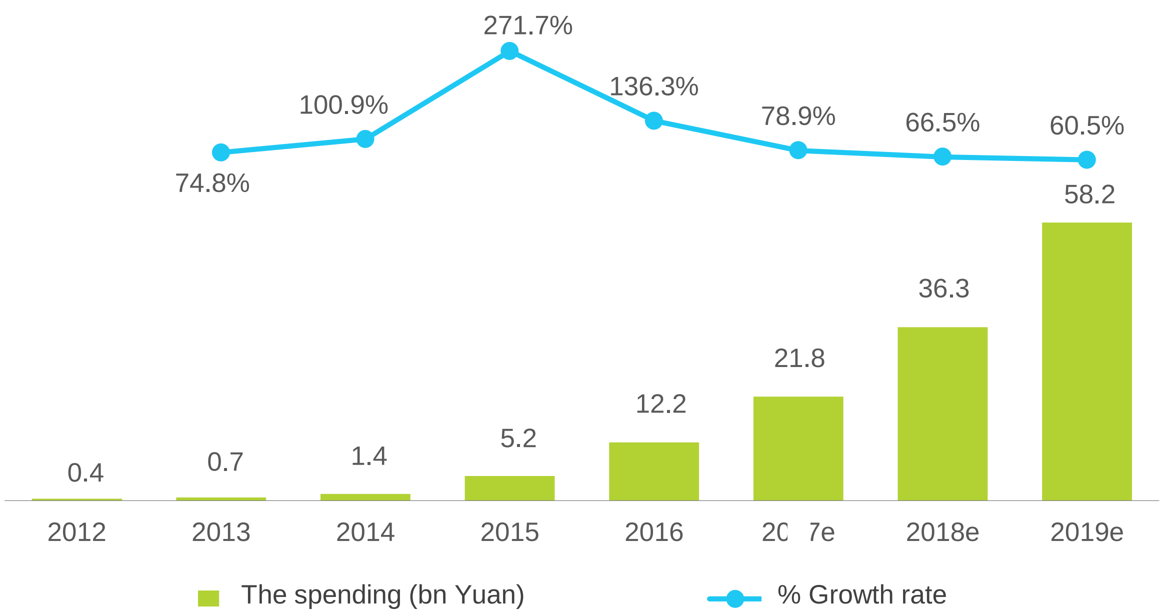
2018 China's Online Paid Knowledge Market Report

Development Status of Content Payment in China

iResearch 艾瑞咨询

For many years, free and rich online content has provided users with easy access to information. Meanwhile, it also increases the difficulty for users to find the exact content they need. With the launch of video site membership systems and digital music albums, the education level of the market has improved significantly, and the internet users have gradually developed the habit of paying for high quality internet content. By the end of 2016, except for the casual games, the payment rates of online videos, music, games, etc. have all exceeded 4%. Taking the online video industry as an example, it has a relatively mature paid business and its payment rate approximated 11.4% in 2016 . The audience spent 21.79 billion Yuan on online video in 2017 and it will keep growing at a rate of over 60% in the next two years. In general, the penetration rate of paid contents will keep increasing. The paid contents market has huge potential.

The Viewers' Spending on Online Video Users in China 2011-2019



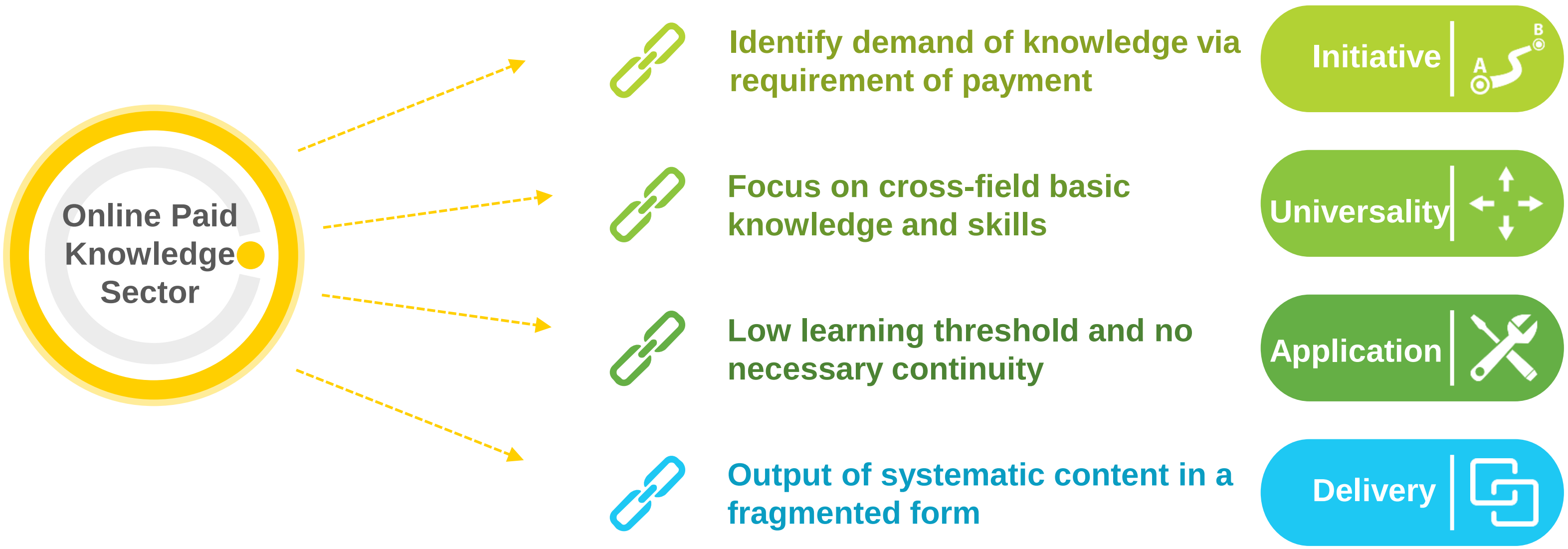
- Video
- Game
- Internet literature
- Music
- Audio
- …

Source: iResearch Consulting Group.

From Education&Training to Online Paid Knowledge

The online paid knowledge sector is based on the users‘ needs for learning. It provides users with online knowledge services centered on cross-field basic knowledge and skills to improve their efficiency in gaining knowledge. Compared with the traditional education and training industry, the online paid knowledge sector has 1) Different motivations. Most of the online paid knowledge users are interested in related fields, have clear demand for knowledge, and are willing to spend time and money in obtaining relevant content efficiently. 2) Different content. The online paid knowledge sector mainly provides users with cross-field basic knowledge and skills. It combines theory with practice, covers a wide range of fields, has a low threshold of learning and no necessary continuity as well as high applicability. 3) Different forms. Online paid knowledge products provide users with systematic content in a fragmented form. It’s highly interactive and it places more emphasis on the service experience brought by delivery forms. Based on its characteristics of strong initiative, wide demand, low threshold, and emphasis on delivery, the online paid knowledge sector will become the “upstream” and “entrance” of in-depth learning, and it will further improve the existing online and offline education and training industry chain.

Characteristics of China's Online Paid Knowledge and Education & Training Industry in 2018

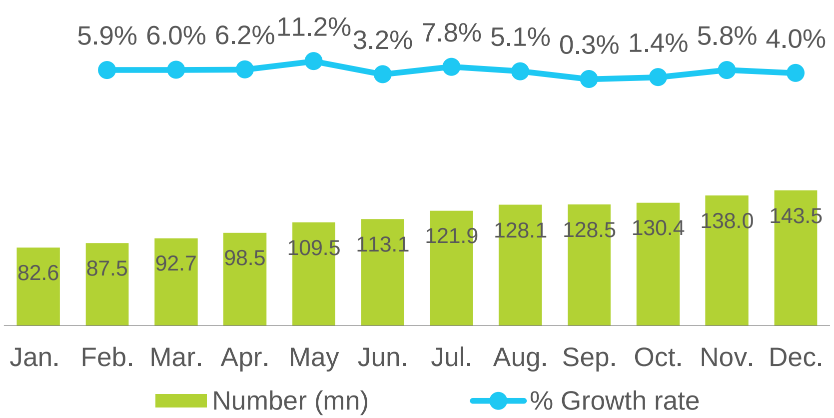


Source: iResearch Consulting Group.

Analysis of Monthly Usage of Online Paid Knowledge Platforms

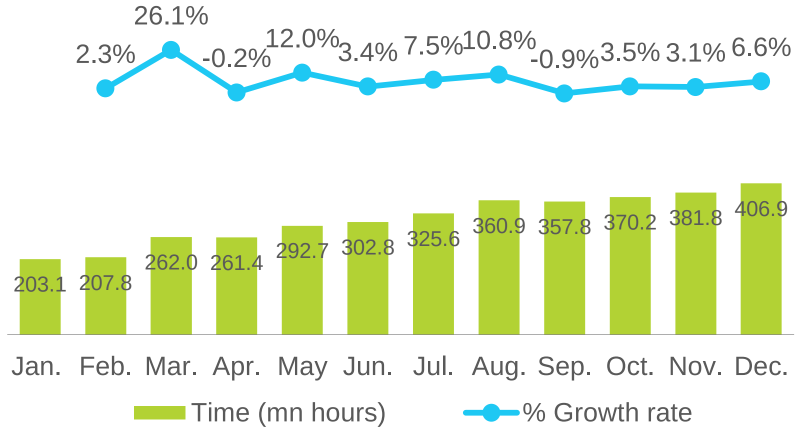
According to the measuring data of iUserTracker, a database measuring mobile Internet user behavior, which was launched by iResearch, in December 2017, the monthly number of unique devices and monthly usage time of the paid knowledge platforms have reached 143 million units and 410 million hours, respectively, increasing by 73.7% and 100.3% respectively compared with the beginning of 2017. The highest monthly growth rates of the both indicators exceeded 11% and 26%, respectively. With the increasing of education level of the market, the payment modes have also become increasingly diversified. In addition to building a knowledge service ecosystem through combination of mainstream payment modes such as Q&A, subscription, and community, the paid knowledge platforms also keep developing interactive activities as a supplement to enhance user stickiness. In the future, as the users attach increasing attention to the paid knowledge platforms, paying for learning knowledge efficiently will become common.

The Unique Devices of Paid Knowledge Platforms in China in 2017



Note: The "Paid Knowledge Platforms" include independent knowledge payment platforms as well as comprehensive knowledge service platforms that set up separate sections and primary entrance for knowledge payment businesses.
Source: mUserTracker. December 2017. The data is based on daily software monitoring of 4 million mobile devices and communication monitoring of over 100 million mobile devices.

Monthly Usage Time of Paid Knowledge Platforms in China in 2017



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Online Knowledge Payment Sector Map

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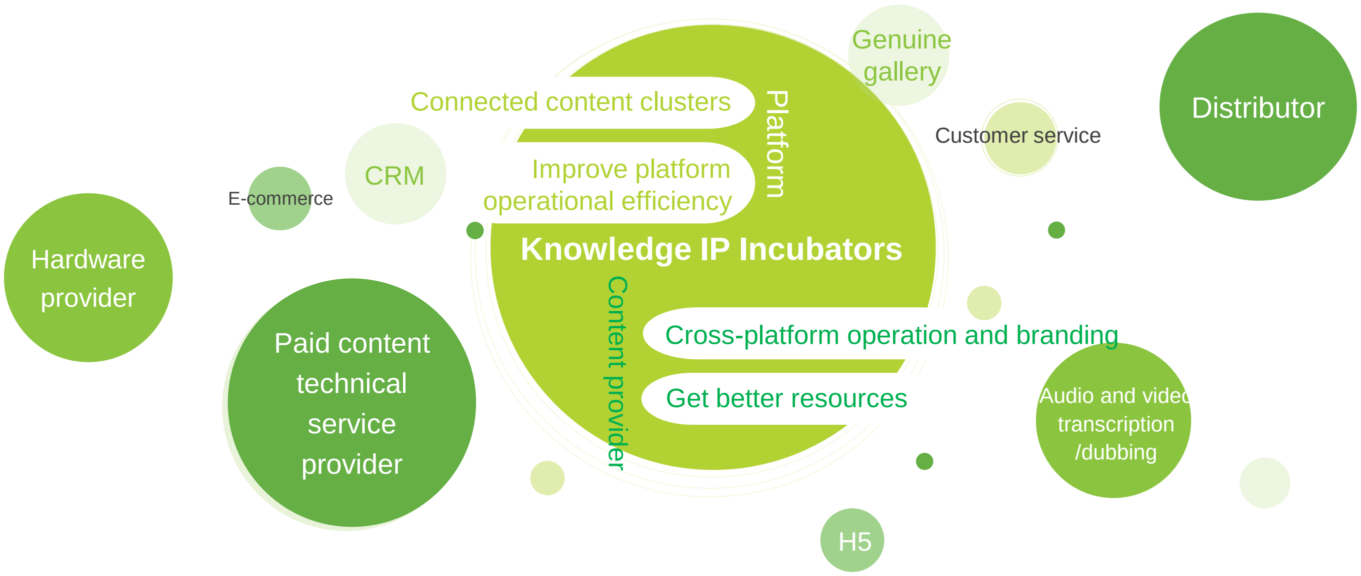
Map of 2018 China's Online Paid Knowledge Sector

Notes: 1) Due to limited space, all companies in the industry chain are not represented; 2) The logos of companies in the core industry chain links are listed in the alphabetical order of the company's Chinese full name.
Source: iResearch Consulting Group.

Analysis of the Links in Online Paid Knowledge Industry Chain - Intermediate

With the progress of the industry, the division of roles will be more professional and subdivided in the future. There will be mature service providers in each link of the industry chain, which will promote the continuous improvement of industrial efficiency. Taking MCN knowledge IP incubators as an example. 1) For the platforms, cooperating with such in accessing to such intermediate can connect diversified, large-scale content clusters. At the same time, these organizations' ability to keep providing high-quality knowledge IP will also help the platform to improve its operational efficiency; 2) The industry resources and experience of such institutions can help content providers in cross-platform operation and brand building, and getting better resources and opportunities in cooperation with the platforms. Except for independent knowledge IP incubators, in order to improve its content layout and extend business monetization, after reaching a certain stage, the leading content providers will also absorb part of the mid- and long-tail content providers to form a self-centered knowledge IP incubation model (not necessarily in institutional form). Some players will also build an online paid knowledge platform to complete the transformation from the content providers to platforms.

Types of Third-party Support Agencies in China's Online Paid Knowledge Industry in 2018

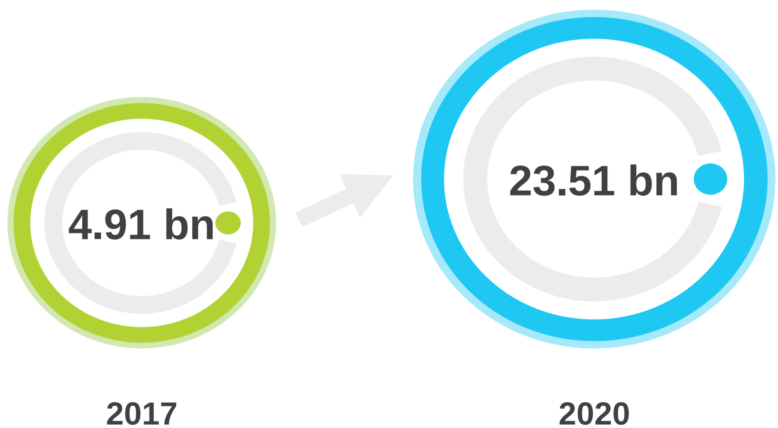


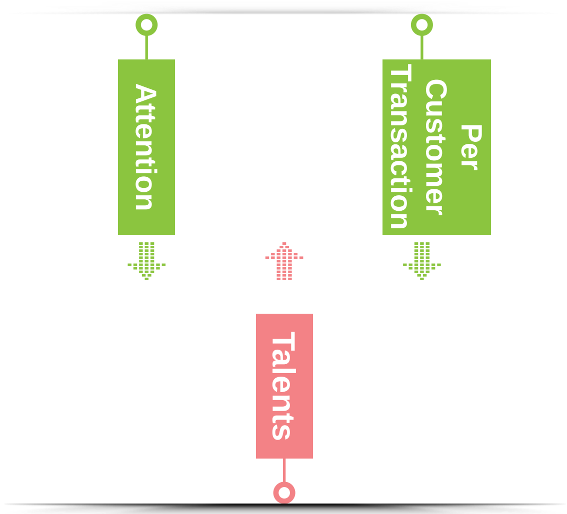
Source: iResearch Consulting Group.

Forecast of Online Paid Knowledge Market Size

In recent years, the residents' intellectual and cultural demands have kept growing, the degree of decentralization of content production has further increased, and the areas related to the cultural content industry has developed rapidly. According to iResearch, in 2017, China's online paid knowledge market size was about 4.91 billion Yuan, which was almost three times larger than that of the previous year. In the future, on the one hand, the growth of traditional publishing, education, media, and other industries is relatively slow. At the same time, the pattern of the leading we-media has also basically formed, and related talents will flood into knowledge service industry that have a shorter process of monetization and a huge space for growth, which will further expand the online paid knowledge market size; On the other hand, limited by the attention of individual users and the range of acceptable per customer transaction of targeted users, the growth rate of the paid knowledge sector will decline and it will become stable eventually. With the gradual increase of market education level and the increasing number of people who are willing to pay for high-quality knowledge services, online paid knowledge market size will maintain a relatively high growth in the next three years, and it is expected to reach RMB 23.5 billion by 2020.

China's Online Paid Knowledge Market Size 2017-2020





Note: China's online paid knowledge market size refers to the revenue knowledge platforms obtained from online paid knowledge business. It does not include other business revenue of the subsidiaries (such as advertising, physical goods e-commerce and other content payment income, etc.). The division between platforms and content providers is not taken into consideration.
Source: The data are calculated based on the publicly available materials and interview with companies in iResearch statistical model.

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Company Introduction / Legal Notice

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About iResearch
iResearch is a provider of insights into China's internet space and global fastest-growing sectors as well as value-added corporate services. It offers a wide range of services including big data insights and forecasts, industry research and corporate consulting, investment and post-investment services.
Founded in 2002, iResearch is the first third-party firm focusing on research in China's internet sector. Since its inception, it has published thousands of industry reports and provided custom research and consulting services to thousands of clients. It is now the preferred third-party research brand for the IPO of Chinese internet companies. iResearch set up its global research center in 2015, expanding the scope of research to fast-growing sectors world-wide.

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Industry data and market forecasts are mainly obtained through desk research, industry interviews, market survey, and other research methods in accordance with iResearch statistical forecast model. Corporate data are mainly obtained through interviews and are for reference only. Some data published in this report is based on sampling method and is therefore influenced by sample structure. Due to the limitation of research method, sample size and scope of data collection, the report only serves as a reference for customers who purchase the report. iResearch is not held liable for the data and views in the report.

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