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Status And Development Of Online Education Platforms In The Post-epidemic Era

Yixuan Dong[a], Bo Shao[a,*], Bingjie Lou[a],Chenchen Ni[a], Xuting Wu[a]

[a]Zhejiang International Studies University , 299 Liuhe Road, Xihu District, Hangzhou City, Zhejiang Province, China, Hang Zhou 310000, China

Abstract

At the beginning of 2020, COVID-19 began to sweep through China, major schools adhering to the concept of "no classrooms instead of classes" and launching online education. The major online education platforms received the "epidemic advantage" and grew. However, on the night of 24 July 2021, when Chinese authorities have introduced a guideline to ease the burdens of excessive homework and off-campus tutoring for students undergoing compulsory education, so that including online education platforms, received a severe blow. As part of the digital economy, the current transformation of the education sector to education informatization, quality education and vocational education may become the vane of the new era.

1. Background, significance and purpose of the study on the explosive development of online education

1.1. Background of the study

As of 8 August 2021, the cumulative number of infections worldwide has reached over 200 million. During the epidemic, schools across China have been actively teaching online[1].

According to central video statistics, Xueersi Online School reaching an average of 2 million students per class in real time, and not only that, many Internet giants have also joined the "battlefield".
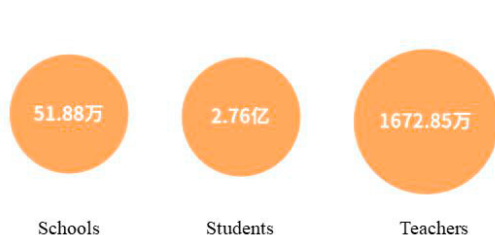
Fig 1 During the epidemic, online classes reached nearly 300 million users[1]
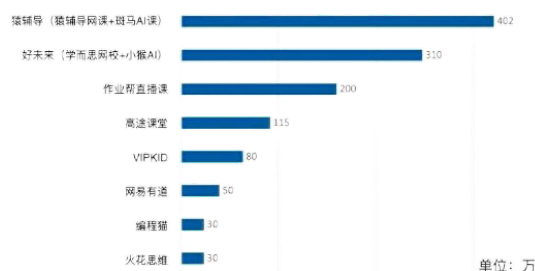

Fig 2 Online course platform regular price course users ranking (Unit: Ten Thousand)

However, the 19th meeting of the Central Committee for Comprehensively Deepening Refor, on 21 May 2021, adopted a guideline to ease the burdens of off-campus tutoring for students undergoing compulsory education[2].

Table 1 Related content about the guideline[2]

Number	Related content about the guideline
1	Existing subject training institutions will be unified and registered as non-profit institutions.
2	The training institutions outside of school should not take up national holidays, rest days and summer and winter vacations to organize discipline-based training.
3	Coordinate the governance of off-campus training for preschoolers aged 3 to 6 and general high school students, and no online training for preschoolers is allowed.
4	Offline subject-based training (including foreign languages) for preschoolers is strictly prohibited in the name of preschools, kindergarten and elementary classes, and thinking training classes.

Nevertheless, on 28 July 2021, as the Ministry of Education issued the "General Office of the Ministry of Education on further clarification of the scope of compulsory education out-of-school training subject class and non-subject class notice", a number of subject class listed companies pointed out the direction of transformation.

Table 2 Adjustment plan for education platforms

Name	Measures
Good Futuer	entered the field of after-school care, providing a variety of services
QingNetwork School	Launched quality products "Aesthetic Education Master Class"
DouSheng Education	Launched a new brand "DouSheng aesthetic education", the layout of quality education track
Xueda Education	indicated that it will make relative adjustments to the company's business operations in light of the actual situation, and will also explore other businesses

Here introduces the paper, and put a nomenclature if necessary, in a box with the same font size as the rest of the paper. The paragraphs continue from here and are only separated by headings, subheadings, images and formulae. The section headings are arranged by numbers, bold and 10 pt. Here follow further instructions for authors.

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1 Source: Ministry of Education of China
2 Hereinafter referred to as "the guideline" or "tutoring sector guideline"

1.2. Significance of the study

It is undeniable that the transformation of traditional education into digital and intelligent is already underway.

With the realisation and promotion of the country's "Two Centenary Goals" and its efforts to achieve the "Vision 2035", how to build a good basic education system and make it play a key role in the process of transforming China's demographic dividend into a talent advantage has become a top priority. Online education platforms can only find a healthy and sustainable development path in the post-epidemic education industry by facing up to the problems, making continuous improvements and seeking new ideas and changes.

Table 3 The content of education in the 2035 long-term goal outline

Number	The content of education in the 2035 long-term goal outline	
Part 13	Improve the quality of the people and promote the all-round development of people	
Part 43	Build a high-quality education system	Section 1: Promoting the equalization of basic public education
		Section 2: Enhancing the adaptability of vocational and technical education
		Section 3: Improving the quality of higher education
		Section 4: Building a team of high-quality professional teachers
		Section 5: Deepen Education Reform

At the same time, emerging technologies represented by cloud computing, big data and AI[3] are being used more extensively in the education, pushing the education and training industry to transform in the direction of digitalisation, intelligence and in-depth experience.

1.3. Purpose of the study

We hope to investigate and research the online education industry to find out how it can adapt to the new normalised environment after the epidemic, using its own strengths.

Especially for the future as an emergency education platform, how the online education APP and school education can be systematically combined is an important prerequisite to ensure that the emergency can be activated at the first time in the future when similar emergency situations arise again.

2. Research content

2.1. Online education development under the epidemic dividend

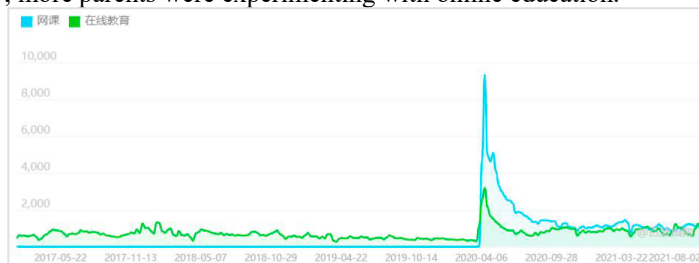Due to the COVID-19, more parents were experimenting with online education.

Fig 3 Baidu index search trend on "online class" "online education" keywords[4]

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3 Artificial Intelligence
4 Source: Baidu Index

As can be seen from the table above, the frequency of searches for "online classes" and "online education" exploded in the first half of 2020 and then dropped significantly, but the overall frequency of searches has increased significantly compared to the previous period.
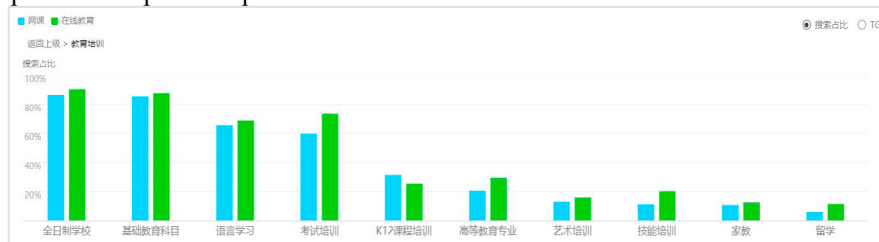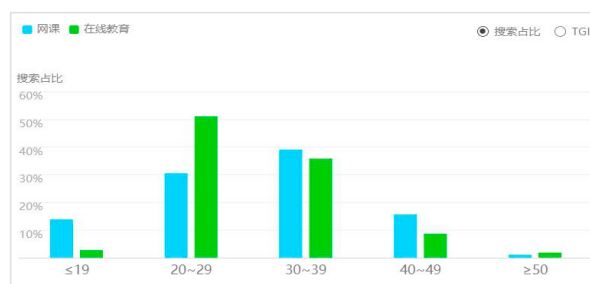

Fig 4 Distribution of keyword-related fields[4]

Fig 5 Age profile of Baidu keyword searchers[4]

Over the past year, searches for online courses in related areas have been extremely high for basic education subjects and exam training,. However, the search rate for language learning and arts training is not low. Besides, the age group for these keywords is mainly 20-29 years old and 30-39 years old.

There is no doubt that online education is still not as good as offline education now, but the fervour of online education will not unabated.

2.2. The current state of development of post-epidemic online education

The "tutoring sector" guideline is undoubtedly a major blow to out-of-school education institutions, including online education platforms.
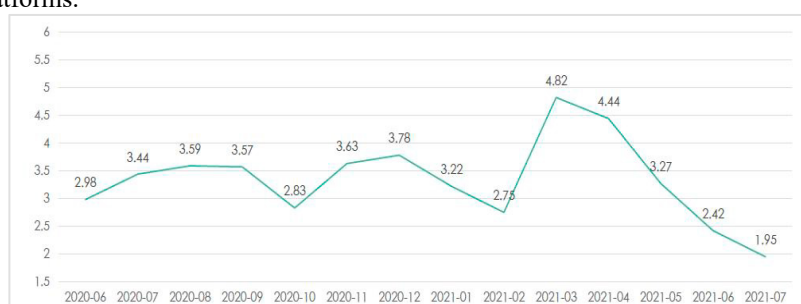

Fig 7 Online Education Job Postings Index[5]

It is reported that the Shanghai Byte Jumping Company officially confirmed on August 5 that its Dali Education started layoffs and some of its businesses were directly shut down. [4] Not only is Byte Jump, but other platforms such as New Oriental, Good Future and Gao Tu have all reported layoffs.

As can be seen from the data, the demand for online education jobs fell rapidly from a very high value of 4.82 in February 2021 to a very low value of 1.95, which can be said to have experienced great ups and downs.

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5 Source: First Financial Network

3. Suggestions for the development of online education platform companies based on the post-epidemic situation

3.1. Transformation of information technology in education

Compared to the 13th Five-Year Plan Period, the budget has basically met the needs of campus hardware infrastructure, but the 14th Five-Year Plan has increased rather than decreased the financial resources for education.
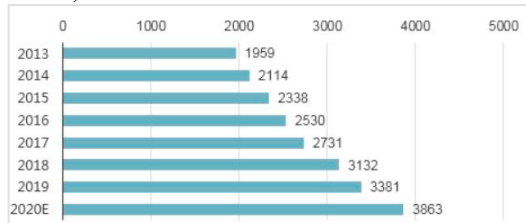

Fig 8 Cost of Chinese education informatization from 2013-2020 （100 million yuan）[6]

Fig 9 Forecast of the overall market scale of education informatization in China from 2013-2021 （100 million yuan）

As shown from the figure above, it is easy to predict that the demand for software facilities in schools will increase in the future.

In the optimization of teaching methods limited to the knowledge base of school teachers, the use of big data and the Internet to integrate excellent educational resources, as well as intelligent campus management, intelligent whiteboard-assisted teaching, will be focused on construction. Then have "Internet + education" based online education platform companies, in data Integration, data governance, data integration, data application of such data centre development is now the best starting point.

3.2. Transformation to quality education and vocational education

Under the "tutoring sector" guideline, non-subject sports, arts and practical activities education will usher in an education dividend. At present, several unicorn companies and even many listed companies in China have started to invest in quality education products.
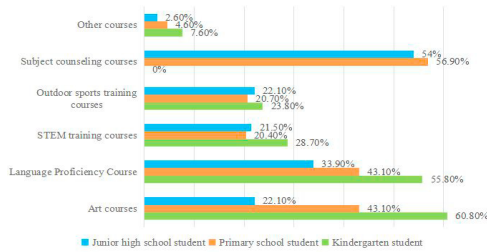

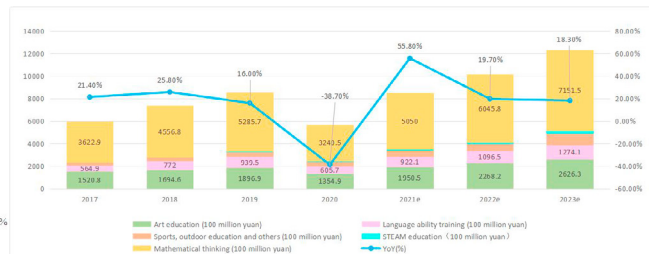Fig 10: Children's curriculum participation in different stages in 2021[7]

Fig 11: 2017-2023 China's quality education industry market size and growth rate[7]

As can be seen from the above picture, the current non-disciplinary education market has developed considerably.

In order to meet the various needs of the future society for talents and solve the social employment problem, the national policy actively promotes the restructuring of the industry; on the other hand, by combining vocational education with undergraduate education, the state expects to solve the phenomenon of "having degree but no skills" in the society, so as to promote the development of the real economy, which will also further open up the market for the vocational education industry.

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6 Source: Public information collation

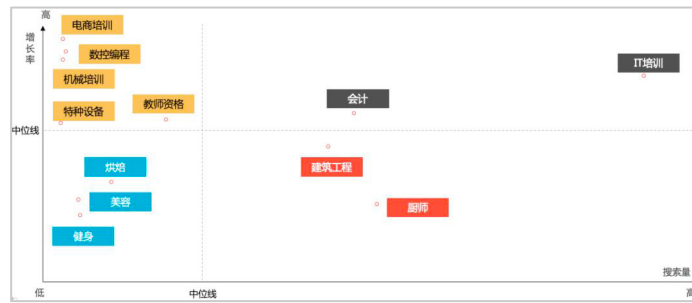7 Source: iResearch Consulting series of research reports

Figure 12：Search volume and growth rate for online vocational education in 2019-2020[8]

It can be seen from Figure 8 that IT training is the most concerned, while e-commerce training and CNC programming are growing at a very fast rate.

4. Innovations of this study

4.1. Stretching across the two major phases of the epidemic dividend and the "tutoring sector" guideline low ebb

This study spans two very current phases of the online education platform, the peak of the epidemic-based dividend and the trough of the "tutoring sector" guideline. It is necessary and timely to explore the future trend of "Internet + Education" and the direction of its future development in the light of the new policy and the changes of the new era.

4.2. Thinking about the development of the online education industry based on the digital economy

This study breaks through the limitations of the education industry by looking at the development of online education platforms from the perspective of economic thinking. It also offers new ideas and perspectives, providing multi-dimensional thinking on the development of "Internet+Education".

Acknowledgements

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8 Source: Baidu Index