



# The Children's book market in China

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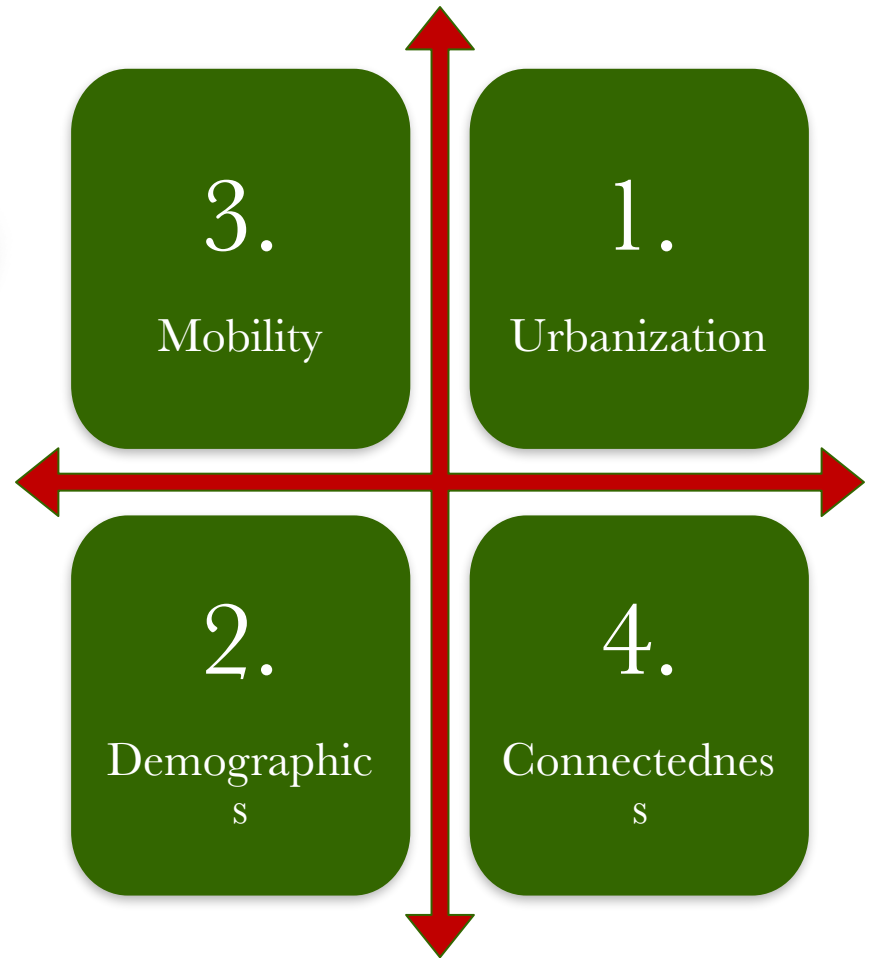
Editor

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# Agenda

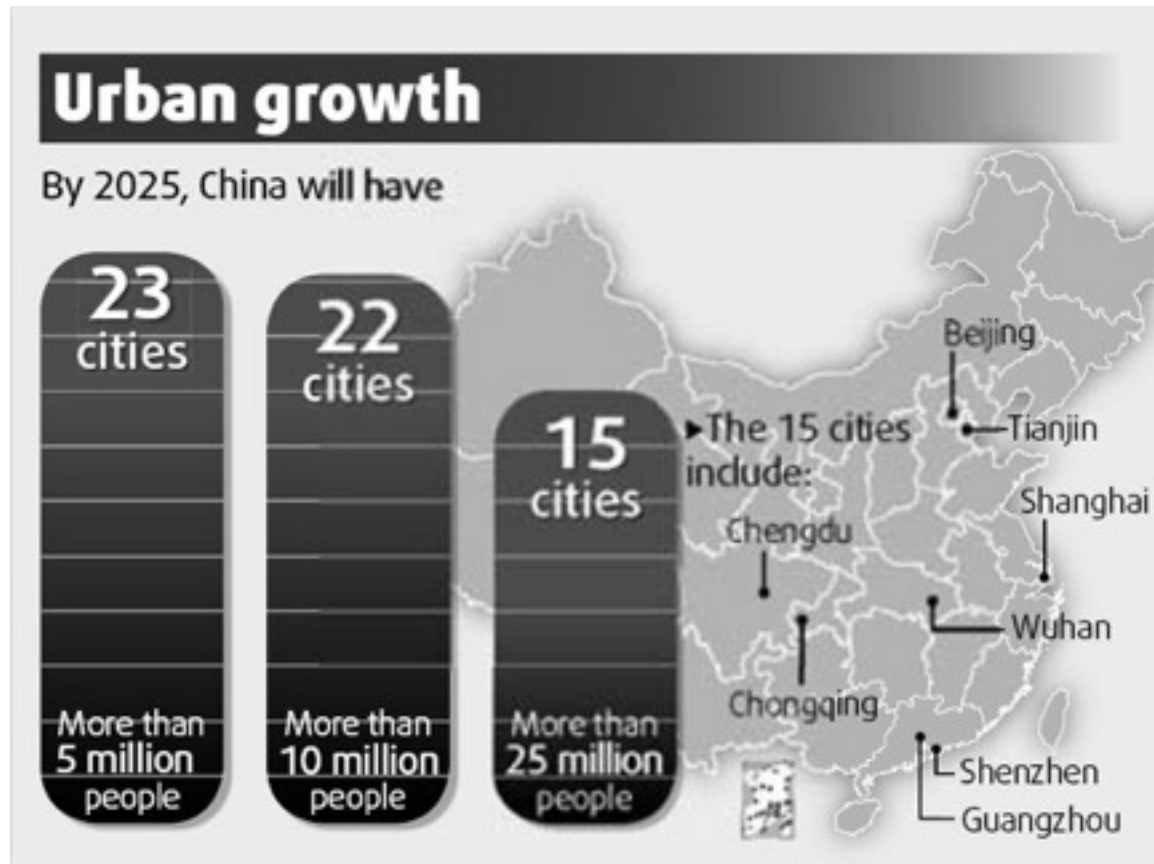
- China in transition
  - Urbanization
  - Demographics
  - Mobility
  - Digital and Mobile markets
- China's population
- Book Publishing and Book Selling in China
- Preschool education program
- Primary Education in China
- Primary and Secondary Schools
- School and Public Libraries
- Literacy

# Four drivers of media convergence --Especially in China!



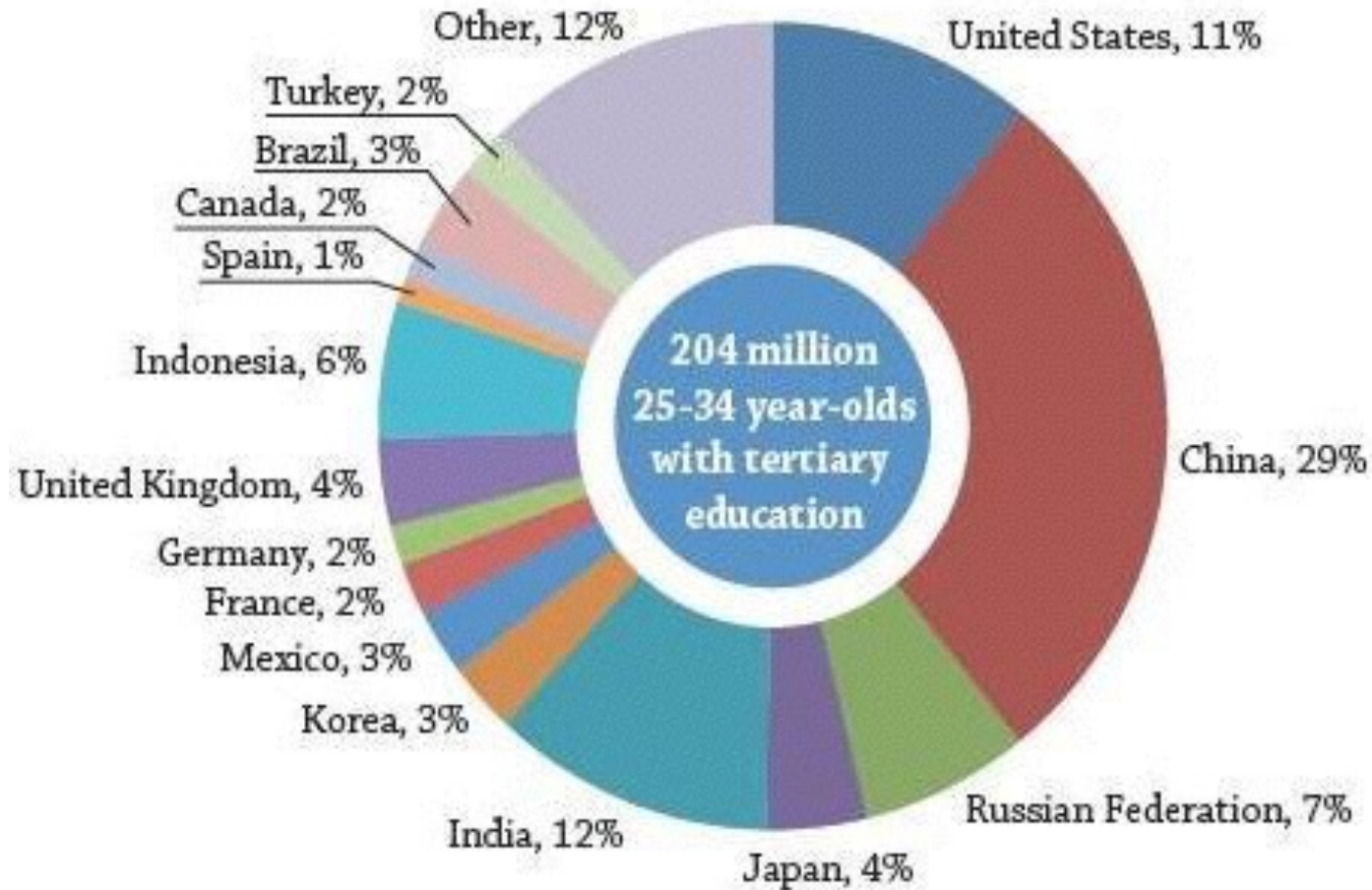
Source: Mckinsey, No Ordinary Disruption, 2015

# 1. Urbanization



## 2. Demographics

2020

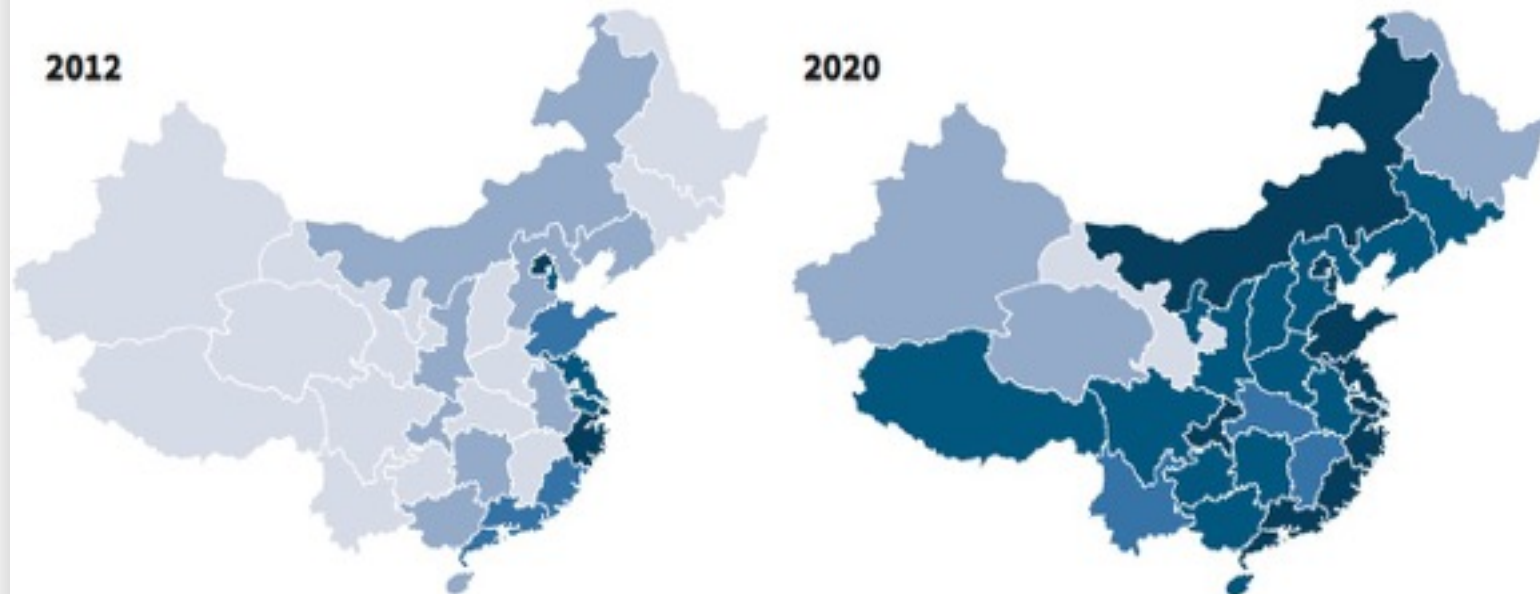


# 3. Mobility -Urban and Educated

## Heading West

Today, China's middle class urban households are mostly concentrated along the eastern seaboard. By 2020, following the rapid growth of cities in the interior, they will be spread through much of China's interior

Middle and affluent urban households as a percentage of total urban households



Source: Center for Consumer and Customer Insight, Boston Consulting Group

M. Weber, 18/04/2013

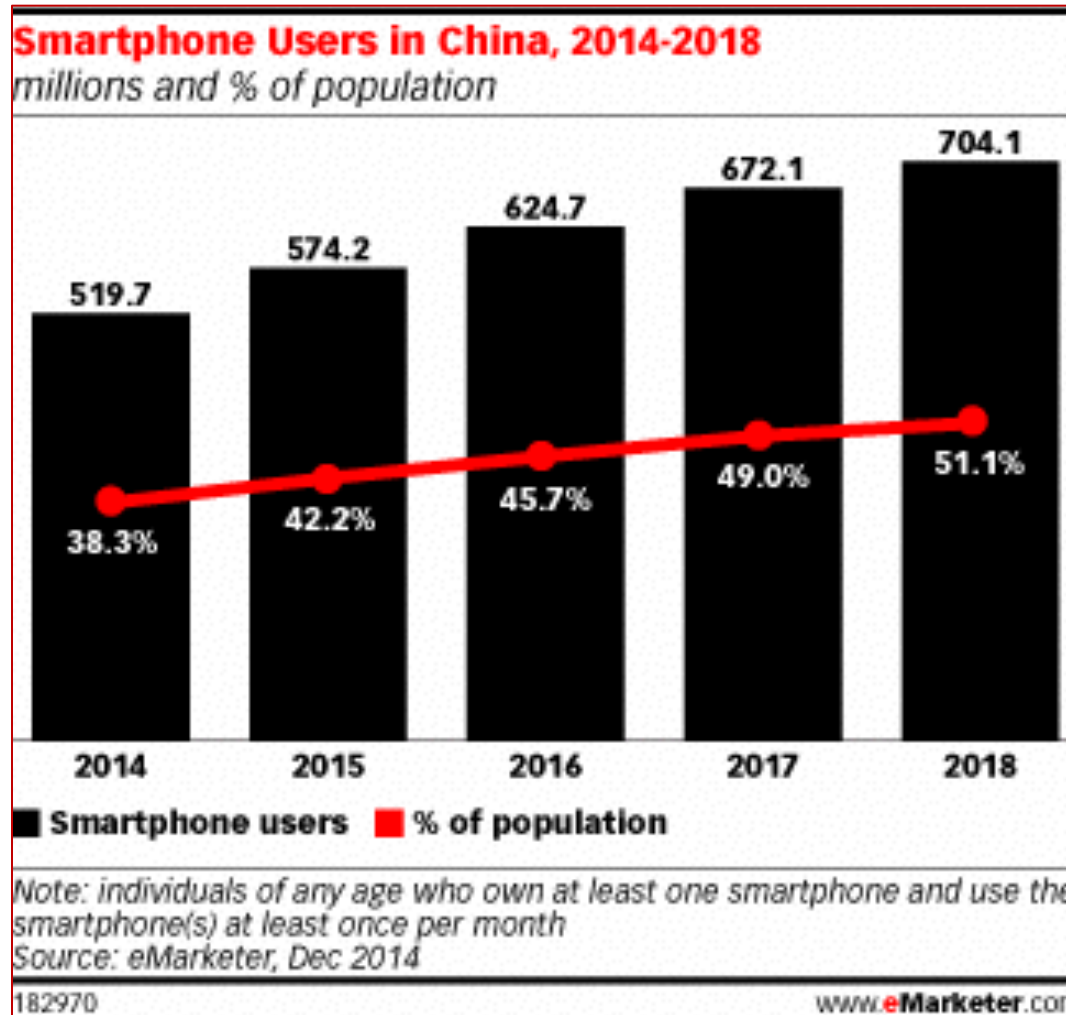
REUTERS

## 4. Digital and Online Markets in China



- Mobile phone users  
2013 - 1.04 billion  
2014 - 1.08 billion
- Smartphone users  
2013 - 446.8 million  
2014 - 574.2 million
- Mobile phone Internet users  
2013 - 556.1 million  
2014 - 607.4 million

# Connected -Smartphone Majority





# Mobile devices proliferate in China



**95%**

Own a Cellphone

**37%**

Own a SmartPhone

**10.5%**

Age 6 - 14 years old

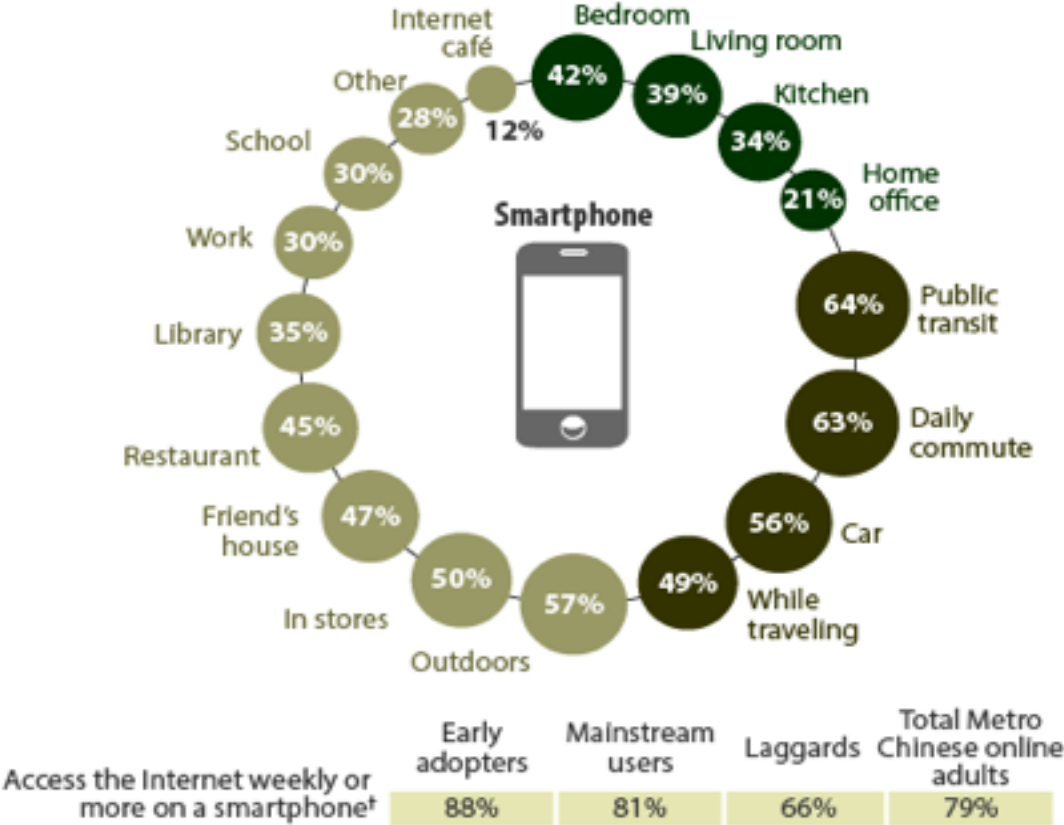
**69%**

Age 18-29  
Own a SmartPhone

Source: Pew Research Center, February 2014

# Mobile used everywhere and anytime

Where do you access the Internet on your smartphone?

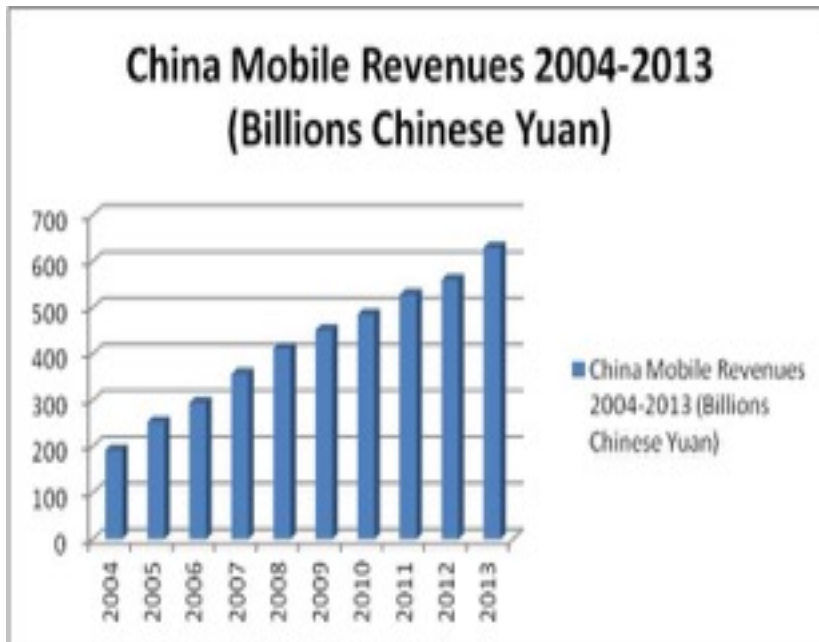


Base: 3,266 metropolitan Chinese online adults (18+) who own a smartphone and go online weekly or more  
 †Base: 4,108 metropolitan Chinese online adults (18+)  
 Source: Forrester's Asia Pacific Technographics China Survey, Q4 2012

# Many ways to connect and share



# Digital and Online Markets in China



## Top ten ecommerce platforms

Alibaba	333m monthly UV's
JD.com	203m
Wanggou	94m
VIPshop	78m
Paipai	69m
Yihaodian	63m
Amazon	51m
Gome	50m
Dangdang	49m
Jumie	46m

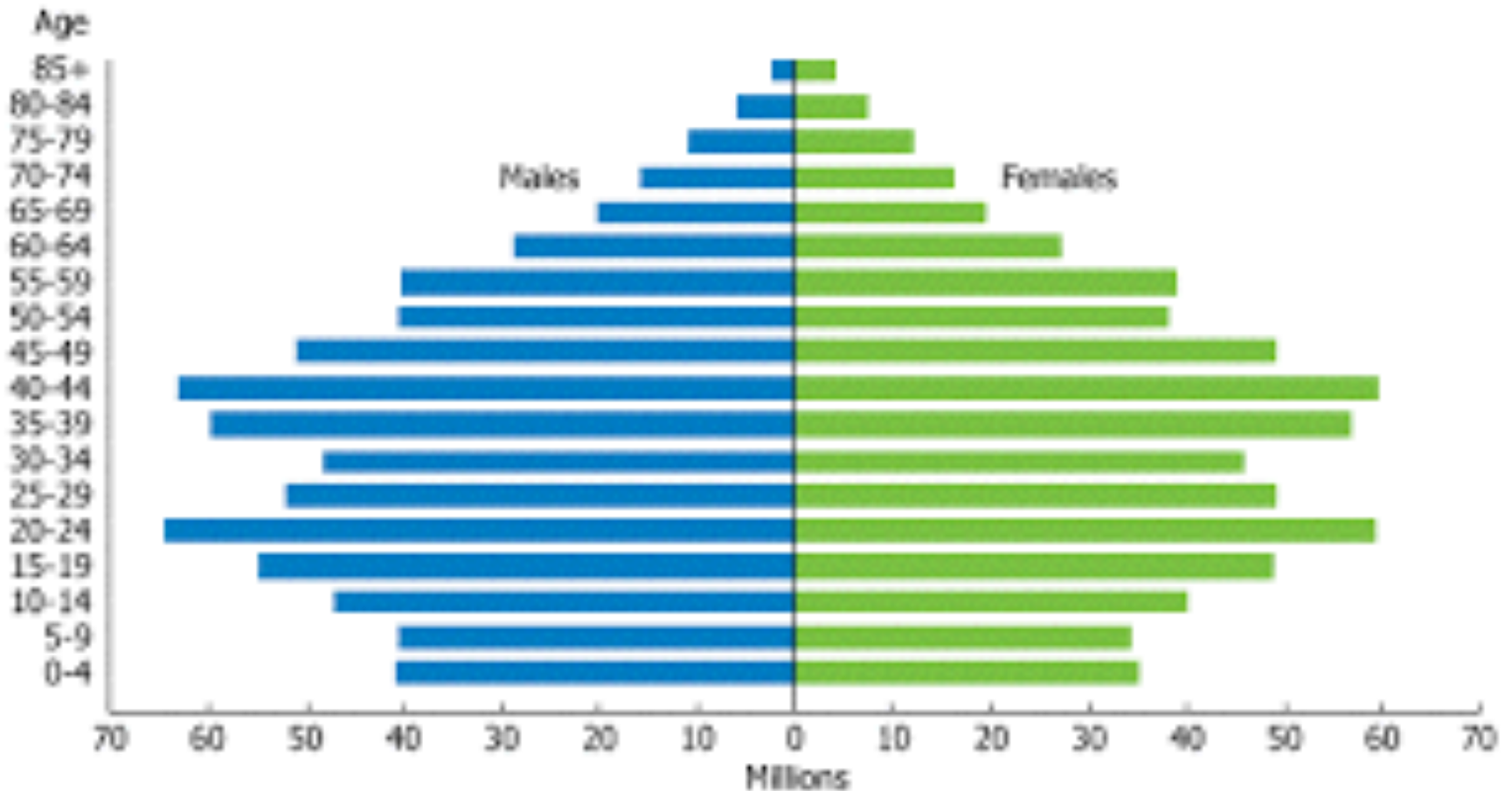
# China Population

- Population 1,355,692,576 (July 2014 est.)  
Age structure
  - 0-14 years: 17.1%**  
(male 124,340,516/female 107,287,324 **Total - 231.5 million**)
  - 15-24 years: 14.7%**  
(male 105,763,058/female 93,903,845 **Total - 199.9 million**)
  - 25-54 years: 47.2%**  
(male 327,130,324/female 313,029,536)
  - 55-64 years: 11.3%**  
(male 77,751,100/female 75,737,968)
  - 65 years and over: 9.6%**  
(male 62,646,075/female 68,102,830) (2014 est.)

# China - demographics

155 million children ages 0 to 9

370 million children below the age of 18



# Book publishing and bookselling in China

## *Publishing industry*

In 2014 about 255,890 new titles were published - about same number as previous year, there has been no growth in number of new titles

There are 582 official publishing houses of which the five largest groups represent more than 52% of sales. The total sales 50 billion yuan in 2014

## *Bookselling industry*

Retail sales in physical bookstores amounted to 30 billion yuan and online booksellers amounted to about 20 billion yuan

Children's books sales increased 10% in 2014 over previous year

Xinhua Bookstore is the only bookstore chain in China. Owned by the China Publishing Group, in 2008 there were 14,200 Xinhua Bookstores prime retail locations across China.

*Source: Publishers*

*Weekly, May 22, 2015*

# Pre-school education Programs

## Three types of early Childhood Programs

- **Nurseries** - for children under the age of 3
- **Kindergarten** - full day programs for children ages 3 to 6 to provide childcare and educational preparation
- **Pre-primary programs** are part of the elementary school with a half day program serving children the year prior to 1<sup>st</sup> grade
- In 2010 there were 138,209 kindergartens with an enrollment of 15,468,596 young children





# Primary Education in China

Education in China is a state-run system of [public education](#) run by the Ministry of Education.

All citizens must attend school for at least nine years, known as the nine-year compulsory education which the government funds

Estimated number of primary schools 280,184 schools  
and 87,665 secondary schools



# Primary and Secondary Education

Statistics of 2010 report that net rate of enrollment in primary school age children to be 99%

Enrollments in primary schools was 17,388,465 students in 2010

To boost literacy rates, the Communist party switched from “traditional” Chinese characters to a “simplified” form (using fewer strokes), however, traditional characters are still used in Hong Kong and Taiwan.

China did not have any private schools until the early 1980's. Today, there are over 70,000 private schools in China of all levels and type.



# School and Public Libraries

There are only 2,925 **Public Libraries** in China

Over the past six years, **The Library Project** has empowered children with the gift of education by:<sup>1</sup>

Providing access to books to over 200,000 children

Donating over 350,000 English and local language children's books, encyclopedias and reference books

Creating colorful, child-safe libraries with new tables and chairs, fresh paint, educational posters, and a world globe.

The goal is establishing over 600 libraries in rural elementary schools and orphanages in 21 provinces throughout China .



# China facts: Literacy Rates

Literacy rate is defined as knowledge of 1,500 Chinese characters in rural locations and 2,000 characters in urban areas.

[“China: Asia in Focus”, R. LaFleur 2010]

Before the Communist party took power in 1949, about 80% of China’s population was illiterate. Enrollment rate was below 20% for elementary school and about 6% of junior secondary school.

[China.org.cn “60 Years of Educational Reform and Development” Sept. 14, 2009 ]

By 2008, adult illiteracy rate in China dropped to only 3.58%. Elementary school and junior secondary school enrollment jumped to 99.5% and 98.5% respectively.

[China.org.cn “60 Years of Educational Reform and Development” Sept. 14, 2009 ]

Today, Chinese youth (15-24 years) have a 99% literacy rate.



*Thank you*      谢  
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