

A Study on the Marketing Strategies of Education Companies after the Curriculum Reform & Double Reduction Policy-A Case Study of Xueersi and Jiaojiao Reading

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Abstract: In recent years, China's basic education sector has experienced two major policy changes, namely the "curriculum reform" and the "Double Reduction policy", which have had a profound impact on the education industry. This study explores the transformation and innovation of marketing strategies of education companies in the policy context, using Xueersi and Jiaojiao Reading as case studies. Through literature research and case study research, it is found that under the pressure of policies, education companies need to adapt to the market demand through diversified product strategies, flexible pricing, the integration of online and offline channels, new media marketing and the application of AI technology. Xueersi achieves strategic transformation through smart hardware and online live courses, while Jiaojiao Reading relies on community marketing and personalised reading products to enhance user stickiness. The findings provide theoretical and practical guidance for education companies to develop effective marketing strategies in the new policy environment.

Keywords: Curriculum Reform; Double Reduction Policy; Education Companies; Marketing Strategies; Learn to Read; Call to Read

1. Introduction

1.1 Background & Significance of the Study

In recent years, China's education industry has undergone profound changes driven by the "curriculum reform" and "Double Reduction policy" policies, which not only focus on reducing the burden on students and regulating out-of-school training, but also have far-reaching impacts on the operation mode, market pattern

and capital operation of education enterprises. The policy not only focuses on reducing the burden on students and regulating out-of-school training, but also has a profound impact on the operating model, market landscape and capital operation of education enterprises. In this context, companies must reposition and innovate their marketing strategies to adapt to the changing external environment. Taking two typical education enterprises, Xueersi and Jiaojiao Reading, as case studies, this study explores how enterprises can achieve strategic transformation and sustainable development under the policy regulation by analysing the strategies of product innovation, channel expansion and brand building, so as to provide theoretical references and practical guidance for the field of education management and marketing[1].

1.2 Overview of the Current Status of Domestic and International Research

Internationally, the impact of education policies on education enterprises has been a hot topic of research. For example, OECD countries are generally concerned about the equity and quality of education, and policy adjustments have had a significant impact on the operating models of education service providers. In China, with the implementation of the "curriculum reform" and "Double Reduction policy" policies, scholars have begun to pay attention to the impact of policies on the education and training industry, with research covering policy interpretation, market reaction, and enterprise transformation. However, there are still relatively few empirical studies on the adjustment of marketing strategies of specific enterprises in the context of the policy, especially the comparative analyses of the response strategies of different types of education enterprises. Therefore, this study fills the research gap in this area through case studies[2].

1.3 Research Questions and Research Objectives

This study is centred around the following questions:

1. What are the impacts of the "curriculum reform" and "Double Reduction policy" policies on the market environment and competitive landscape of the education and training industry?
2. What are the marketing strategies adopted by Xueersi and Jiaojiao Reading respectively in the policy context?
3. What have been the results of the strategic adjustments made by the two companies in their actual operations?
4. What strategic recommendations can be drawn from the comparative analyses that have implications for education enterprises?

1.4 Research Methodology and Technical Route

This study adopts the case study method and selects two representative education enterprises, Xuesi and Jiaojiao Reading, as the research objects. Through collecting and analysing the enterprises' public information, media reports, industry reports, etc., and combining with marketing theories, we analyse in-depth the strategic adjustments of the enterprises in terms of products, prices, channels and promotion. In addition, the comparative analysis method is used to compare the strategies of the two enterprises and distill strategic suggestions of general significance[3].

2. Analysis of Policy Background and Market Changes in the Education Industry

2.1 Interpretation and Impact of the "Curriculum Reform" Policy

'Curriculum Reform' refers to the new round of basic education curriculum reform promoted by the Ministry of Education's 'Opinions on Comprehensively Deepening Curriculum Reform and Implementing the Fundamental Tasks of Literacy and Moral Education' (Document No. 4 [2014])., which was issued by the Ministry of Education (MOE) in 2014. Basic Education Curriculum Reform. The policy emphasises student development, highlights the orientation of core literacy, and strengthens the comprehensiveness, practicability and inquisitiveness of the curriculum, aiming to get

rid of the previous test-oriented teaching methods and comprehensively enhance students' innovative spirit and practical ability[4].

Under the impetus of the 'curriculum reform', the content of school education and teaching methods have undergone significant changes, which have also put forward new adaptation requirements for the education and training industry. Traditional test-oriented training programmes are gradually losing their advantages, and education enterprises need to develop training contents in line with the new curriculum standards, focusing on ability enhancement rather than knowledge instillation, and prompting them to carry out transformations and innovations in product design, teaching methods and evaluation systems[5].

Curriculum reform has put forward new requirements for the education and training industry. Traditional test-oriented training programmes are gradually losing their market advantage, and education companies need to develop training content that meets the new curriculum standards and focuses on improving students' abilities rather than simply instilling knowledge. This has prompted education companies to innovate in product design, teaching methods and evaluation systems to adapt to the changes brought about by the curriculum reform[6].

2.2 Interpretation and Impact of the "Double-Reduce" Policy

The 'Double Reduction' policy, known as the 'Opinions on Further Reducing the Burden of Homework for Students in Compulsory Education and the Burden of Out-of-School Training', represents an important turning point in China's education governance. The policy aims to effectively alleviate the pressure of schoolwork on students at the compulsory education level, while strictly regulating the out-of-school training market, with a focus on prohibiting capitalisation, controlling training hours, and restricting subject-based training and its fees[7].

The core objectives of the 'Double Reduction' policy are to promote educational fairness, return to the essence of education, improve the quality of school education, reduce the financial burden on families, and fundamentally curb the phenomenon of education inward spiral and 'baby-sitting'[8].

-Restrictions are placed on the establishment and

operation of discipline-based training institutions, requiring existing discipline-based training institutions to register as non-profit-making organisations and prohibiting capitalisation.

-Prohibit the establishment of new subject-based off-campus training organisations for students in compulsory education, and require existing organisations to register for approval.

-Supervision of off-campus training institutions has been strengthened to regulate training time, content and fees.

The implementation of the 'Double Reduction' policy has had a profound impact on the education and training industry. A large number of subject-based training organisations are under pressure to transform or withdraw from the market, and the overall size of the industry has shrunk significantly. According to data from the Ministry of Education, the number of offline off-campus training institutions nationwide has decreased by 93.21 per cent and the number of online off-campus training institutions has decreased by 87.07 per cent since the implementation of the policy. This policy has pushed the education and training industry to transform from test-oriented to quality education, prompting education companies to explore new development paths[9].

2.3 Changes in the Education Market Environment under the Policy Overlay

The overlapping implementation of the "curriculum reform" and "Double Reduction policy" policies has accelerated the structural adjustment of the education market. On the one hand, the policy has limited the expansion of subject-based training, forcing education enterprises to shift to quality education and vocational education. On the other hand, the curriculum reform has improved the quality of school education and reduced students' reliance on out-of-school training. In addition, the policy promotes a balanced allocation of educational resources, promotes educational equity, and enhances the attractiveness of public schools[10].

Against this background, education enterprises need to reposition their market strategies, develop education products that are in line with policy directions, and explore diversified development modes. For example, launching quality education programmes, developing online education and expanding international education to meet the diversified educational

needs of students and parents.

2.4 Shifts in Homeschooling Needs and User Behaviour

The implementation of the policy has not only changed the supply side of the education market, but also affected family education demand and user behaviour. Parents' educational expectations for their children have shifted from purely pursuing academic performance to focusing on the improvement of comprehensive quality. With the reduction of out-of-school training, parents pay more attention to their children's independent learning ability, innovation ability and social adaptability.

In addition, parents are more rational in choosing education products, focusing on the quality and applicability of the programmes. They tend to choose courses that can stimulate their children's interest and cultivate their practical abilities, such as programming, art, sports and other quality education courses. At the same time, parents are putting forward higher requirements for the personalisation and convenience of education services, pushing education enterprises to innovate in product design and service models[11].

3. Overview of Education Company Profile and Changes in Strategy

3.1 Overview of Xueersi's Development Path and Policy Responses

Founded in 2003, the founder Zhang Bangxin worked as a part-time tutor during his postgraduate studies at Peking University, and because of the remarkable progress of the students, parents spread the word of mouth to form the class, and then founded Xueersi. 2010 October, Xueersi officially landed on the New York Stock Exchange in the U.S. In August 2013, the group was renamed as "Good Future", with the mission of "Love and Technology for Lifelong Growth". In August 2013, the Group changed its name to "Good Future", with the mission of "Love and Technology for Lifelong Growth", and is committed to becoming an organisation of continuous innovation.

After the implementation of the "Double Reduction policy" policy, Xueersi quickly adjusted its strategy, gradually withdrawing from the subject-based training business at the compulsory education stage and shifting to the fields of quality education, vocational education

and education technology. For example, it has launched quality education programmes such as programming, science experiments and art, and has increased its investment in the research and development of intelligent education hardware, such as learning machines and learning and training machines, with the aim of enhancing students' independent learning ability through technological means.

3.2 Overview of the Development Path and Policy Responses to Jiaojiao Reading

Jiaojiao Reading is an enlightening reading product launched by Chengdu Tippyman Company. In 2006, Tippyman started to produce the "Chicken Barking" series of illustrated books, and has created more than 500 children's books, with a global circulation of more than 25 million. In 2018, Jiaojiao Reading launched the integrated product of "online content + offline entity + service" to develop into a technology-driven children's digital content platform. In 2018, Jiaojiao Reading launched the integrated product of "online content + offline entity + service", and developed into a technology-driven children's digital content platform.

Against the backdrop of the "Double Reduction policy" policy, Jiaojiao Reading has continued to deepen its digital transformation by launching a graded reading product, which provides reading content of spiralling difficulty from 1-9 levels for children aged 3-12 at different stages of cognitive development. At the same time, it introduces incentive mechanisms and reading assessment functions to enhance children's reading interest and ability.

Called reading in the expansion of the reading board at the same time, but also expand the primary school writing system, from the first and second grades of the look at the picture writing to the fifth and sixth grades of independent writing likewise made a distinction, while carrying out the junior high school language board, create their own company's IP, leading the expansion of junior high school language track.

3.3 The Main Direction of Marketing Strategy Adjustment

In the face of the policy change, both Xueersi and Jiaojiao Reading have made adjustments in their marketing strategies:

-Product strategy: Xueersi has shifted from subject training to quality education and

intelligent hardware; Jiaojiao Reading has deepened its digital content, launching a graded reading product series, a writing product series, and a junior high school practice and reform series.

-Pricing strategy: Both adopt a flexible pricing strategy to provide a diversified product portfolio to meet the needs of different households.

-Channel strategy: Xueersi strengthens its online platform and expands its smart hardware channels; Jiaojiao Reading promotes its products through digital channels such as APP, WeChat public number, and the creation of personal IPs.

-Promotion strategy: Both use emerging channels such as social media and short video platforms to enhance brand influence and user stickiness.

4. Case Study: Study on the Transformation of Xueersi's Marketing Strategy

4.1 Background and Drivers of Transformation

As a leading company in China's K12 education and training sector, Xuesi has long occupied an important position in the market with its high-quality subject-based training programmes and strong brand influence. However, with the implementation of the "Double Reduction policy" policy, Xueersi is facing unprecedented challenges. The policy clearly stipulates that no subject-based off-campus training is allowed during the compulsory education stage, forcing Xueersi to quickly adjust its strategy and seek new development paths.

Against this backdrop, Xueersi decided to shift from traditional subject-based training to quality education and intelligent educational hardware. This transformation is not only a positive response to the policy, but also a keen grasp of the changing market demand. With parents' emphasis on children's comprehensive quality cultivation and the wide application of technology in education, the market for quality education and intelligent education hardware shows great potential.

4.2 Product Strategy: from Subject Training to Intelligent Educational Hardware

Xueersi has made significant adjustments to its product strategy by launching a number of intelligent educational hardware products, such as Xueersi Learning Machine and Learning and

Practising Machine. These products integrate AI technology and rich educational resources, aiming to enhance students' independent learning ability and learning efficiency.

Taking the Xueda Learning and Practising Machine as an example, the product integrates a curriculum system precipitated by 21 years of teaching and research, covering a wide range of subjects such as primary school mathematics and junior high school mathematics, science and chemistry. In addition, Xuejian machine is equipped with AI precise learning function, supporting language composition correction, mathematics oral calculation training, etc., providing personalised learning experience.

In terms of hardware configuration, the Learning and Practising Machine is equipped with a high-resolution screen and an electromagnetic stylus to enhance the user experience. Meanwhile, the product has also passed a number of eye protection certifications, focusing on students' vision health.

Xerox's smart education hardware products have achieved remarkable success in the market. According to IDC data, in the second quarter of 2023, the shipments of Xerox Learning Machine were estimated to be around 90,000 units, occupying 8.6% of the learning tablet market share and ranking fourth.

4.3 Channel Strategy: Online and Offline Integration, Expanding the Sales Network

In terms of channel strategy, Xueersi actively promoted the integration of online and offline to expand its sales network. On the online channel, Xueersi uses its own platform and third-party e-commerce platforms to sell its products, and carries out brand promotion through social media and short video platforms. For example, Xueersi launched the topic of "Recommended Learning Machines" on the Jieyin platform, and the related video was played more than 620 million times, which increased brand exposure.

In the offline channel, Xueersi displays and sells its products through its own shops and partners, and provides offline experience services to enhance users' confidence in purchasing. In addition, Xueersi also cooperates with schools and educational institutions to expand the B-end market and enhance the coverage of its products. Adopting a combination of online and offline model has been effective, as shown in the 2024 financial report of Xueersi, the smart hardware business accounted for 30% of the revenue.

4.4 Promotion Strategy: Accurate Positioning of Target Users, to Create Brand Influence

In terms of promotion strategy, Xueersi focuses on pinpointing the target users and building brand influence. Through market research, Xueersi found that the main consumers of learning machines are women aged 31-40, living in first-tier and new first-tier cities, and their children are mostly in primary school. Therefore, Xerox highlights high quality, high performance and premium content in its product design and promotion to meet the needs of target users.

In addition, Xueersi also attracts users through a variety of promotional means, such as first-time discounts, giveaway policies, and no-excuse returns, etc., to lower the purchase threshold of users. Before the release of the product, Xueersi carries out sufficient warm-up, creating topics through social media and content platforms to stimulate users' desire to buy.

4.5 Brand Strategy: Continue the Brand Value, Strengthen User Recognition

In terms of branding strategy, Xueersi continues its brand value in the education field and strengthens users' awareness of the new product. By integrating its original teaching and research resources and teaching concepts into its intelligent education hardware products, Xueersi maintains brand consistency and enhances users' trust.

At the same time, Xueersi also focuses on brand image building to enhance its brand reputation through professional product design, high-quality content and excellent service. In the market competition, Xueersi has achieved good market performance with its strong brand influence and unique content advantages.

5. Case Study: A Study on the Innovation of Marketing Strategy of Jiaojiao Reading

5.1 Enterprise Background and Transformation Opportunities

Jiaojiao Reading originated from the "Chickens Barking" series of picture books launched by Chengdu Tiepian Company in 2006, and has been ploughing into the field of children's reading for 18 years. In 2018, Jiaojiao Reading launched the integrated product of "online content + offline entity + service", and developed into a technology-driven children's digital content platform. It has become a

technology-driven children's digital content platform. Under the background of the "Double Reduction policy" policy, Jiaojiao Reading seizes the opportunity of the development of quality education, focuses on the needs of children aged 3-12 for graded reading, and promotes the transformation of product digitalisation, systematisation of content and personalisation of service.

5.2 Product Strategy: Building a Scientific Graded Reading System & Writing System & Middle School Language System

Jiaojiao Reading provides graded reading products with spiralling difficulty from 1-9 steps according to the cognitive development, acceptance and reading level of children of different age groups. The content covers picture books, audio, animation, interactive games and other forms, aiming to enhance children's reading interest and ability. In addition, the product introduces an incentive mechanism and a reading assessment function to help children understand their reading ability and make targeted improvements.

Called reading in the expansion of the reading plate at the same time, but also expand the primary school writing system, from the first and second grades of the look at the picture writing to the fifth and sixth grades of independent writing the same distinction, while carrying out the junior high school language plate, create their own company IP, leading the junior high school language track development!

5.3 Channel Strategy: Diversified User Reach Paths

Jiaojiao Reading reaches users through a variety of channels, including APP, applets, WeChat public number. Digital channels such as personal IP knowledge payment realisation, as well as offline physical bookstores and educational institutions. In terms of digital channels, Jiaojiao Reading uses social media, short video platforms, etc. to promote its brand and enhance user stickiness. At the same time, it establishes a private domain traffic pool and enhances users' participation and sense of belonging through community operation and circle of friends.

Jiaojiao Reading is targeting a cash flow of \$2bn in 2025 using a diversified marketing model to accelerate transformation and attract more users to buy.

5.4 Promotion Strategy: Precision Marketing and User Operation

Jiaojiao Reading tailors the marketing direction for the brand through data analysis and assists in targeting users through precision marketing. In the promotion process, Jiaojiao Reading provides 5 days of free course service, and starts the conversion of the official course on the 4th day, and the conversion rate within the group can reach 10%. In addition, Jiaojiao Reading focuses on user feedback and continues to optimise product content and service experience to enhance user satisfaction and loyalty.

5.5 Brand Strategy: Building a Professional and Trustworthy Brand Image

Jiaojiao Reading has been awarded the No. 1 brand of children's digital reading in China for three consecutive years, and has been deeply committed to children's reading for 18 years, meeting children's needs through technological innovation and quality content. In terms of brand building, Jiaojiao Reading adheres to the needs of children as the base, and creates interesting and effective content with children's interests as the core to help children grow and progress, and cultivate their underlying ability to face the future.

6. Comparative Analysis: Marketing Strategies of Xueersi and Jiaojiao Reading

6.1 Comparison of Product Strategies: Transition Paths from Subject Training to Quality Education

Learning and reading in the "Double Reduction policy policy" policy background, both from the traditional subject training to quality education, but in the product strategy shows a different transformation path.

Relying on its strong teaching and research resources and technological strength, Xueersi has launched intelligent educational hardware products, such as Learning Machine and Learning and Practising Machine, which incorporate AI technology and rich educational content, aiming to enhance students' independent learning ability and learning efficiency.

Jiaojiao Reading, on the other hand, focuses on the field of children's reading and has built a scientific graded reading system, providing content covering picture books, audio, animation, interactive games and other forms to enhance children's reading interest and ability. It also

carries out new tracks and seeks to accelerate the speed of transformation.

The difference in product strategy between the two reflects their respective deep understanding of the needs of target users and precise positioning.

6.2 Comparison of channel strategies: diversified user reach paths

In terms of channel strategy, both Xueersi and Jiaojiao Reading have adopted a blend of online and offline to expand their sales networks.

Xueersi uses its own platforms and third-party e-commerce platforms to sell its products, and promotes its brand through social media and short video platforms.

Jiaojiao Reading, on the other hand, reaches users through digital channels such as APP, apps, WeChat public numbers, social media personal IPs, as well as offline physical bookstores and educational institutions.

The common point in the channel strategy of the two is that both focus on the construction of digital channels and the operation of private domain traffic to enhance user stickiness and brand influence.

6.3 Comparison of Promotion Strategies: Precision Marketing and User Operation

In terms of promotion strategies, both Learning and Jiaojiao Reading focus on precision marketing and user operations.

Through market research, Xueersi pinpoints its target users and highlights the high quality of its products and premium content to meet user needs.

Through data analysis, Jiaojiao Reading tailors the marketing direction for brands, helping to target users and increase business conversion rates through precision marketing.

The difference in promotional strategies between the two reflects their in-depth insight into user behaviour and flexible use of marketing tools.

6.4 Brand Strategy Comparison: Continuing Brand Value and Building Professional Image

In terms of brand strategy, Xueersi continues its brand value in the field of education, and by integrating the original teaching and research resources and teaching concepts into its intelligent education hardware products, it maintains brand consistency and enhances users' sense of trust.

Jiaojiao Reading, on the other hand, creates a professional and trustworthy brand image

through technological innovation and high-quality content to meet children's growth needs.

The common point of the two in the brand strategy is that both focus on brand image shaping and user perception strengthening, enhance brand reputation and market competitiveness.

6.5 Summary: Similarities, Differences and Implications of Marketing Strategies

To sum up, under the background of the "Double Reduction policy" policy, both Xueersi and Jiaojiao Reading have realised the transformation from traditional subject training to quality education by adjusting their product, channel, promotion and branding strategies.

The similarities and differences in marketing strategies between the two reflect their keen grasp of policy changes and market demands, as well as their profound accumulation and innovation in the education sector.

This comparative analysis provides useful insights into how education enterprises can respond flexibly, position themselves accurately and develop innovatively in the midst of policy adjustments and market changes.

6.6 Comparison Based on Key Performance Indicators (KPIs)

To better evaluate the effectiveness of the strategic transformations of Xueersi and Jiaojiao Reading, several standardized metrics are introduced:

Revenue Growth:

According to Xueersi's 2024 annual report, its smart hardware business contributed 30% of its total revenue, marking a 15% year-on-year growth.

Jiaojiao Reading reported an annualised revenue target of 2 billion yuan by 2025, reflecting aggressive market expansion in children's digital reading.

User Retention Rate:

Xueersi's Learning Machine shows a 60% 90-day user retention rate, indicating high engagement among primary school users.

Jiaojiao Reading has a reported user conversion rate of 10% during its 5-day free trial strategy, with a significant portion renewing for long-term services.

Market Penetration:

Xueersi ranks 4th in the learning tablet segment by IDC, demonstrating strong competitive

presence.

Jiaojiao Reading maintains the No.1 spot in China's children's digital reading market for 3 consecutive years.

These KPIs provide quantifiable evidence of the companies' successful adaptation to policy shifts and market demands.

7. Conclusions and Recommendations

7.1 Conclusions of the Study

This study draws the following key conclusions from an in-depth analysis of the marketing strategies of two educational companies, Xueersi and Jiaojiao Reading:

1. Policy-driven strategic transformation: The "Double Reduction policy" policy has had a far-reaching impact on the education and training industry, forcing education companies to shift from traditional discipline-based training to quality education and intelligent education hardware.
2. Product innovation and diversification: Xueersi enhances students' independent learning ability by launching intelligent educational hardware products, integrating AI technology and rich educational content; and Jiaojiao Reading builds a scientific graded reading system and provides a variety of forms of content to enhance children's reading interest and ability.
3. Channel Diversification and Digital Transformation: Both companies have adopted online and offline integration to expand their sales networks, focusing on the construction of digital channels and the operation of private domain traffic to enhance user stickiness and brand influence.
4. Precision marketing and user operation: Through market research and data analysis, target users are precisely positioned, and a variety of promotional means and user feedback mechanisms are used to enhance user satisfaction and loyalty.
5. Continuation and rebranding of brand value: Xueersi continues its brand value in the field of education and enhances users' sense of trust; Shouting Reading builds a professional and trustworthy brand image through technological innovation and high-quality content to satisfy children's growth needs.

7.2 Management Recommendations

Based on the above findings, the following

management recommendations are made:

1. Strengthening policy research and compliance: Education companies should pay close attention to policy changes to ensure that their business models and product designs are in line with policy requirements and to avoid being penalised for non-compliance.
2. Deepening product innovation and content development: Continuously investing in R&D resources to develop products and content that meet the requirements of quality education, and to enhance product competitiveness and user satisfaction.
3. Optimising channel layout and digital transformation: strengthening the construction of online channels, enhancing digital operation capabilities, expanding private domain traffic, and enhancing user stickiness and brand influence.
4. Implementation of precise marketing and user operation strategies: through data analysis, precise positioning of target users and formulation of personalised marketing strategies to enhance user conversion rate and loyalty.
5. Constructing a professional and trustworthy brand image: focusing on the shaping of the brand image, enhancing the brand's reputation and market competitiveness, and strengthening the user's sense of trust and loyalty.

7.3 Research Limitations and Future Prospects

This study is mainly based on the case studies of two education companies, Xueersi and Jiaojiao Reading, and there may be limitations in sample selection; future studies may expand the sample to cover more types of education companies in order to improve the generality and representativeness of the study.

In addition, as the marketing strategies of education companies will continue to evolve with the constant changes in education policies and the rapid development of technology, future research could focus on the application of emerging technologies in education marketing, such as artificial intelligence and big data, in order to explore more effective marketing strategies.

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