



The State of Chinese Language Learning in the US

As the COVID-19 pandemic has increased the adoption of remote learning, the opportunity for children to learn a second language online is now more popular than ever thanks to the advancement of technology and the emphasis of personalized learning. HolonIQ, an industry analyst, estimates that the global market for digital, direct to consumer language learning is \$17 billion, of which \$2 billion (or 12%) is non-English language learning.

Mandarin Chinese is the second most spoken language in the world, but currently less than 1% of US children under the age of

17 are learning it. LingoAce, a leading Mandarin Chinese language learning platform, is taking an innovative approach to create a fun, engaging education experience for students with gamified lessons taught 1-on-1 by certified teachers.

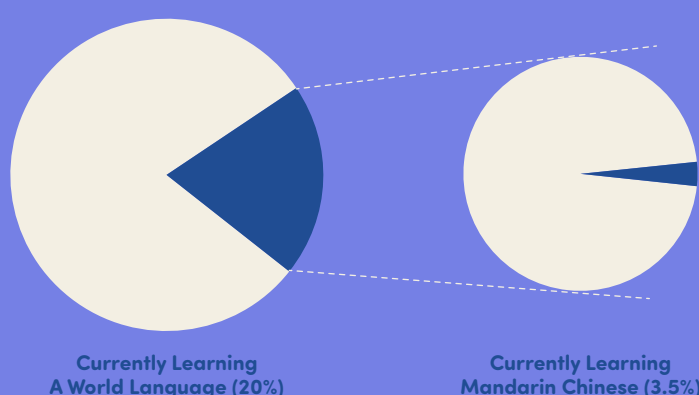
In November, 2021, LingoAce reached out to 5,000 American parents of children under 18 to understand the state of foreign language learning and specifically, how children are learning and the key drivers for learning Mandarin Chinese. LingoAce also conducted literacy review.

The Market

In the US today, there are 73 million children under the age of 18¹, but only 20% of them are learning a world language.² Furthermore, LingoAce estimates that only 3.5% of these children are learning Chinese (approximately 420K total). Based on results from the survey, their parents spend just under \$1 billion on after-school Chinese language learning per year.

¹ Source: US Census (2019 ACS 1-Year Estimates)
² Source: American Councils for International Education

US Children Aged 3-17 by Chinese Language Learning Status



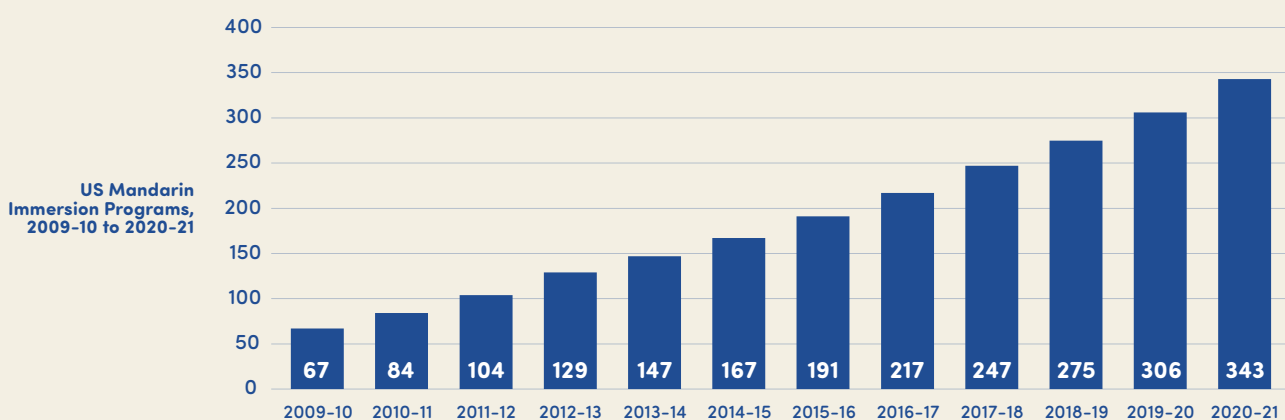
Rising Popularity

Over the past ten years, interest in learning Mandarin Chinese has been on the rise. This is evident from the growing number of US-based Mandarin immersion programs and the increasing prevalence of non-heritage learners. Non-heritage learners are those who do not have Chinese ancestry.

The survey found that many non-heritage parents are interested in fostering cross-cultural education and acknowledge that Chinese is a global language that will open up career prospects for children.



The number of US-based Mandarin Chinese immersion programs has grown 16% annually since the 2009-2010 school year³



³Mandarin Immersion Parents Council

Of those aged 3-17 learning Mandarin, 55% identify as heritage and 45% identify as non-heritage.

The leading reasons for wanting a child to learn Mandarin Chinese are:

- 1) prevalence of Chinese as a global language
- 2) better career prospects
- 3) staying close to heritage/culture

Online vs. Offline

The COVID-19 pandemic has driven increased adoption of online learning solutions. Learning a language online is a more affordable, convenient and flexible solution for learners and parents.

Nearly 2/3 of children learning Chinese are leveraging an online solution, with online adoption significantly higher among non-heritage learners.

Q: Where are your child(ren) currently studying Mandarin Chinese? Please select all that apply.

