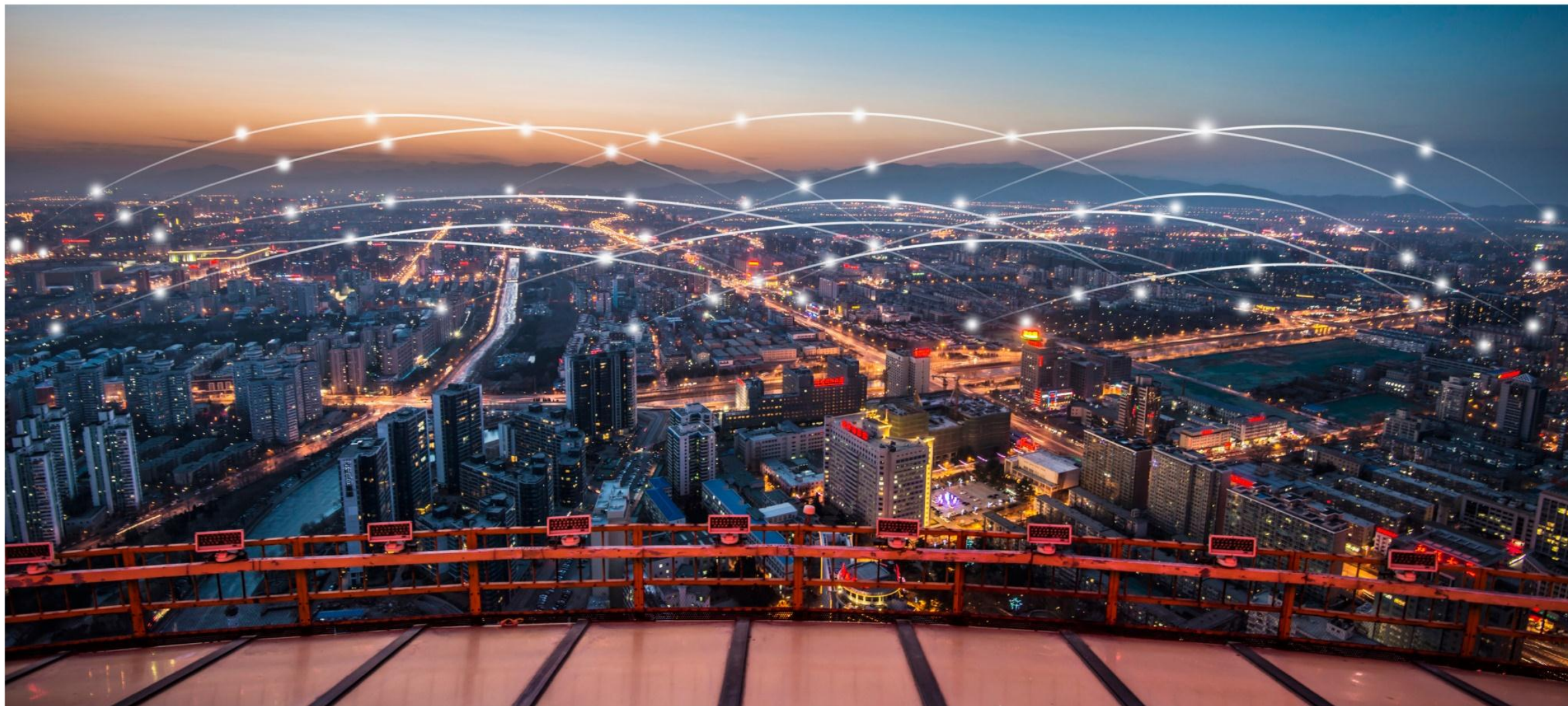


中国媒体概览 China Media Overview



Social Media

Summary :

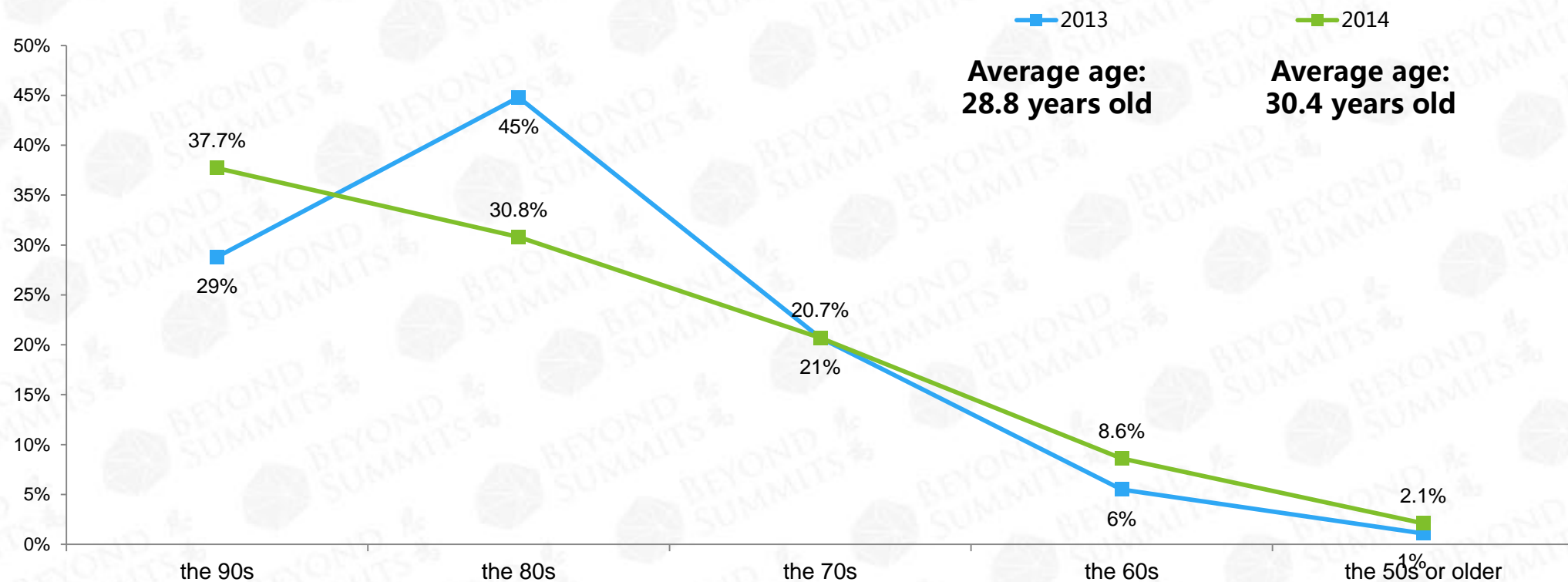
- 90s generation has become the main users of Chinese social media. 90s generation prefer to watch internet videos, while 80s and 70s prefer to shop online and read news respectively.
- Chinese netizens open and use 6-10 media APPs on average every day. The most frequently used social media platforms are WeChat, QQ and Weibo. When they use social media platforms, they outweigh 'media' nature of the platforms to obtain news and information as well as share their lives instead of being 'social'.
- WeChat users are younger and more frequently browse the platform. The users not only acquire common socialization by WeChat, but obtain information and life convenience as well.
- Most of the Weibo users are male whose ages are relatively older than that of WeChat. Geographically, the Weibo users concentrate in such areas as Shanghai, Zhejiang Province, Jiangsu Province and the Zhujiang Delta.

Summary :

- Currently, various APPs developed by such Internet tycoons as Baidu, Alibaba and Tencent are taking leading positions in China's mobile Internet market.
- Mobile Social Platforms: Tencent's two APPs outperformed their competitive APPs.
- Mobile Entertainment Platforms: The top3 mobile video APPs are Tencent, Youku and IQIYI. And the top3 mobile music APPS are KUGOU music, QQ music and KUWO music.
- Mobile News Platforms: The top5 APPs are Tencent, TOUTIAO, 163 news, SOHU news and IFENG news.
- Mobile Tourism: In this October, a merger between QUNAR and CTRIP produced the greatest mobile tourism APP in China.
- Mobile E-commerce: TAOBAO outperformed other APPs.

Up to year 2014, 90s generation has become the main users of social media in China.

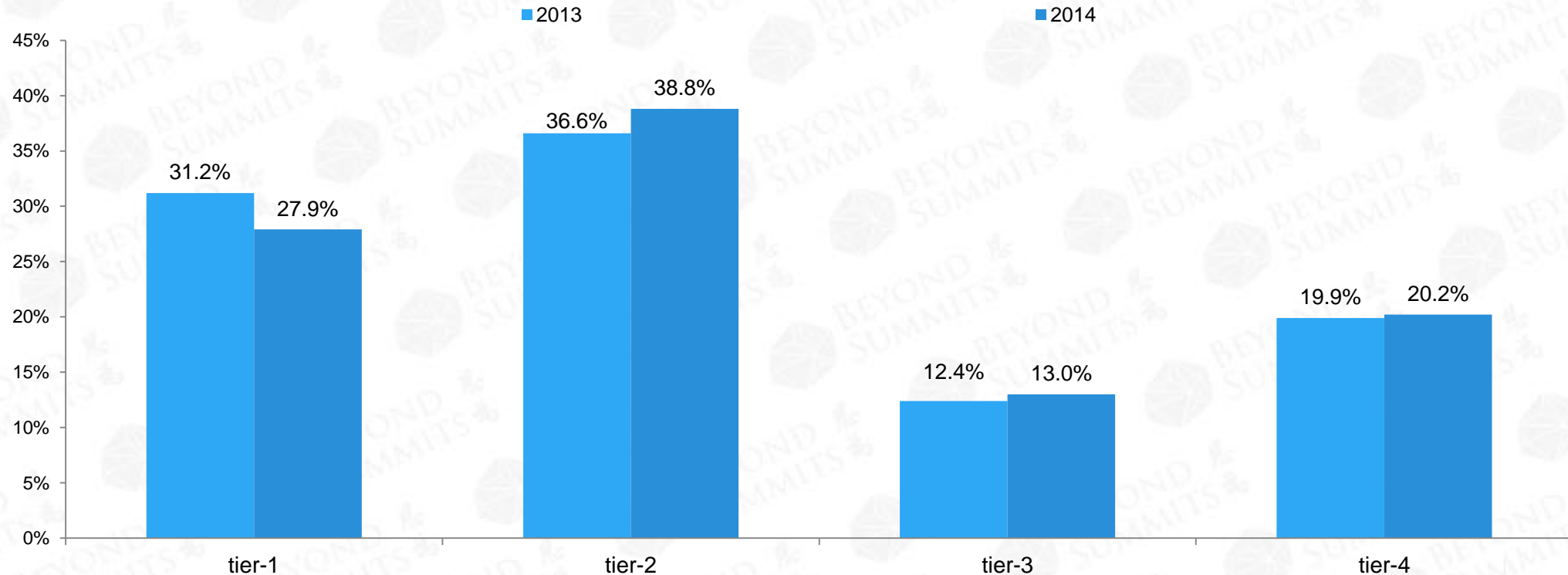
Changing trends on China social media users' age distribution(%)



Source: KANTAR Social media development report

In 2014, social media users of Tier 2 cities have outnumbered that of Tier 1 cities.

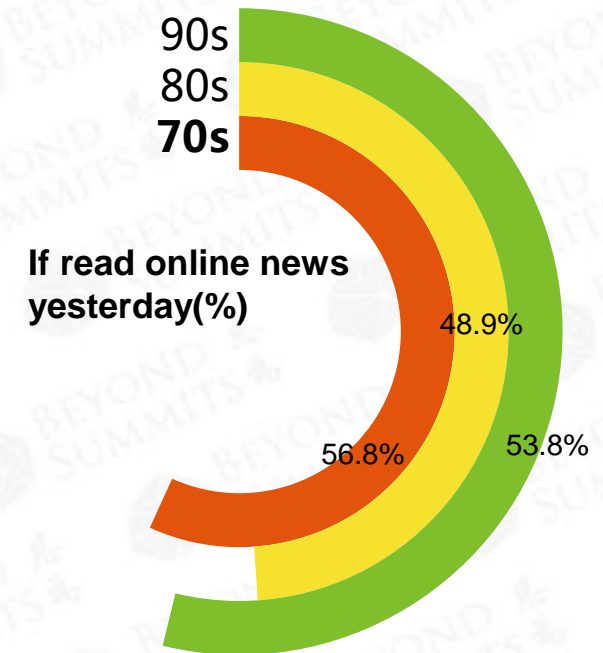
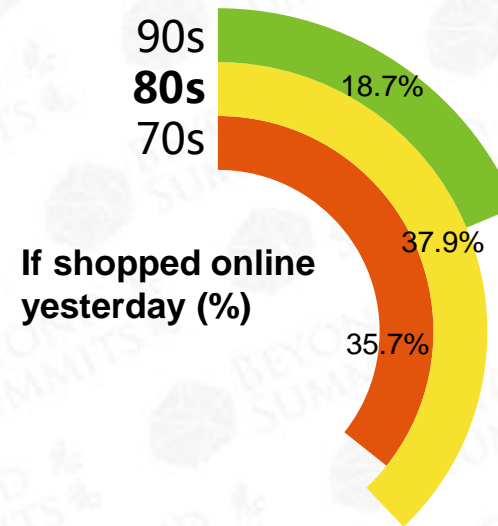
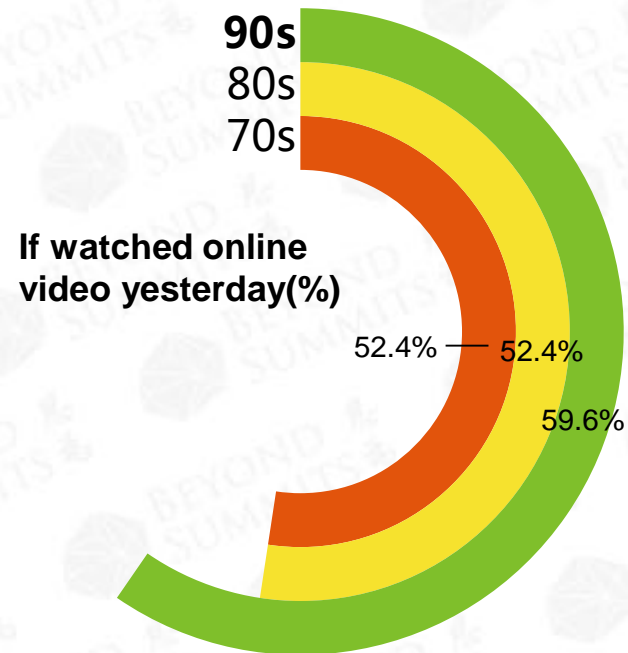
Changing trends on China social media users' geography distribution



Source: KANTAR Social media development report

90s, 80s and 70s generations like online videos, online shopping and online news readings, respectively.

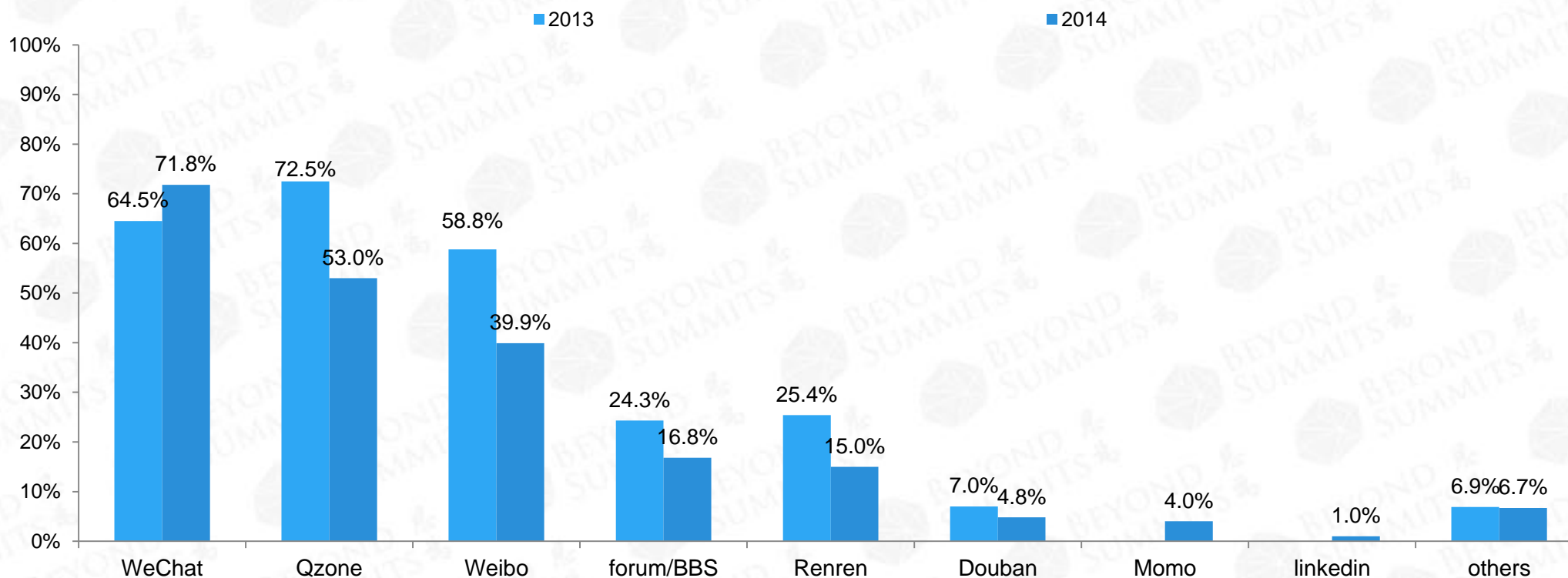
Different generation social media users' behavior distribution



Source: KANTAR Social media development report

The most frequently used social media platforms are WeChat, QQ and Weibo in 2014

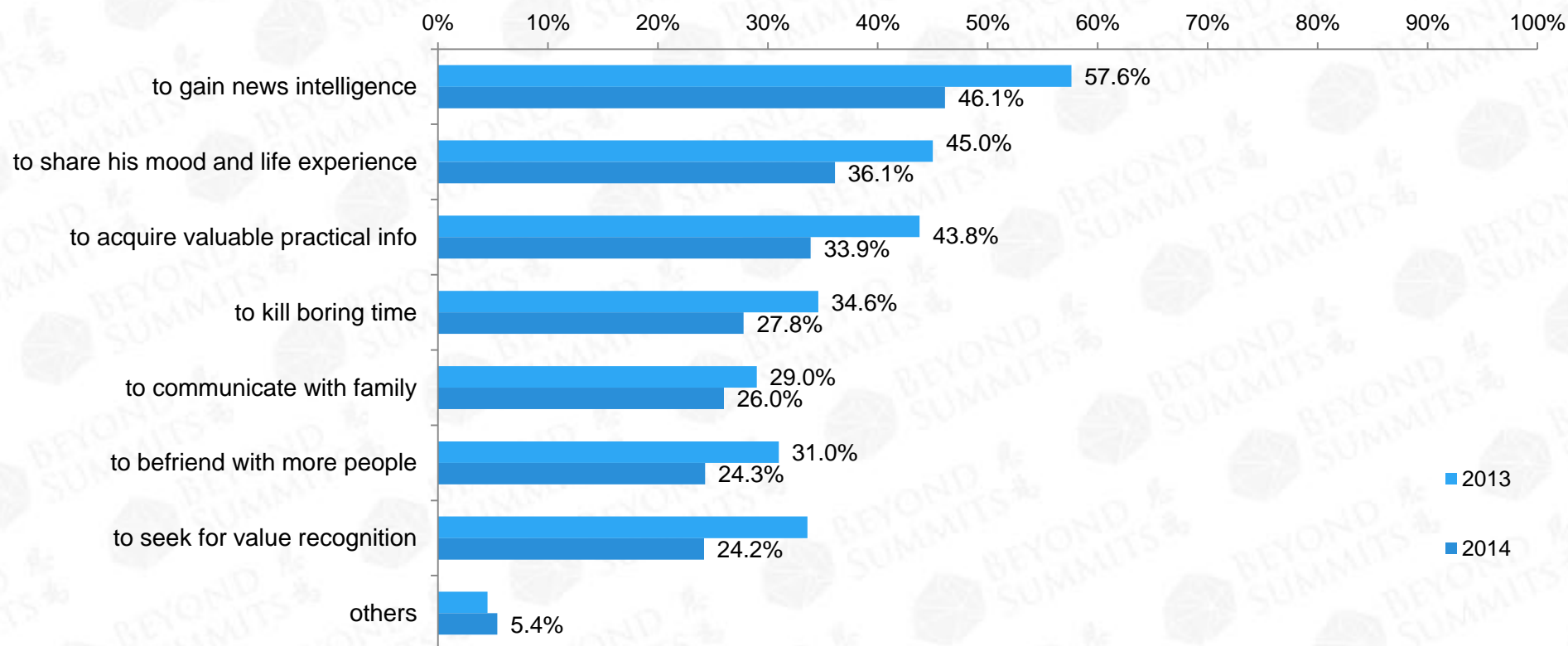
China netizens' frequently used social media



Source: KANTAR Social media development report, China social media users' attitude survey

When the netizens use social media platforms, they outweigh 'media' nature of the platforms to obtain news and information as well as share their lives instead of being 'social'.

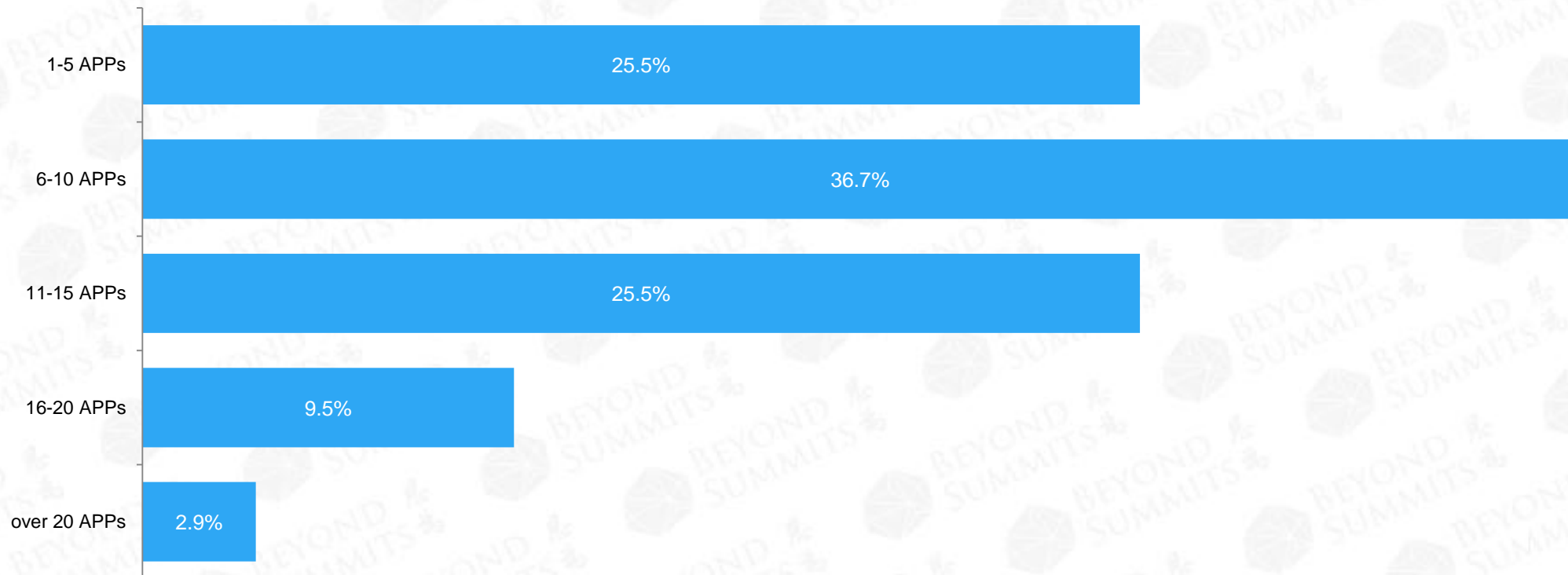
Main purpose for China netizens to use social media



Source: KANTAR Social media development report, China social media users' attitude survey

A mobile netizen will averagely start and use nearly 10 different APPs per day.

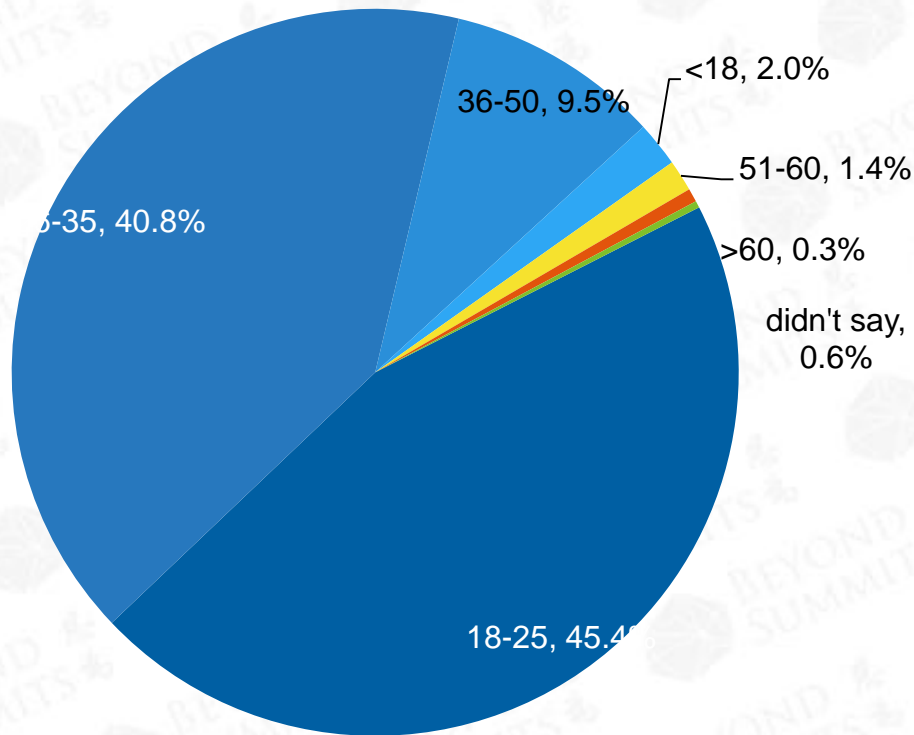
The number of APPs averagely started by mobile netizens



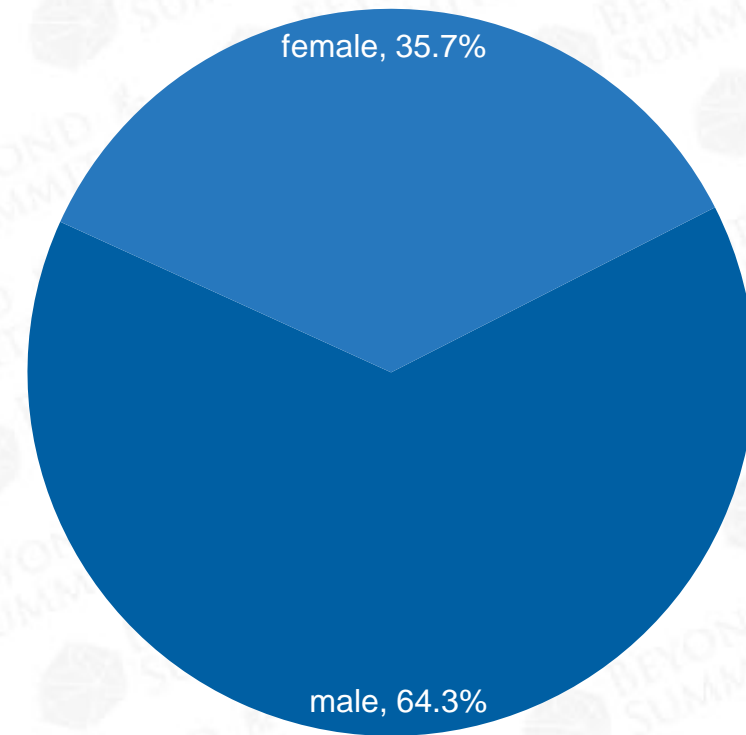
Source: KANTAR Social media development report, China social media users' attitude survey

WeChat: users aged from 18 to 35 account for 90% of total user group. WeChat has more male users.

WeChat users' age distribution



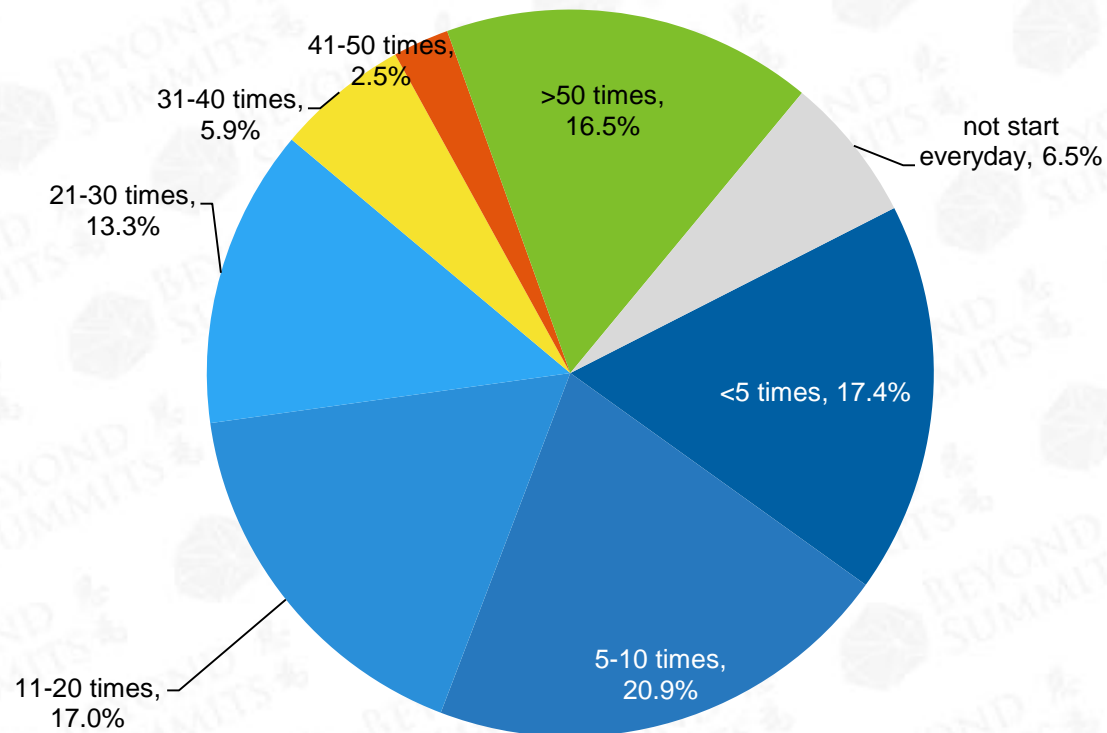
WeChat users' age distribution



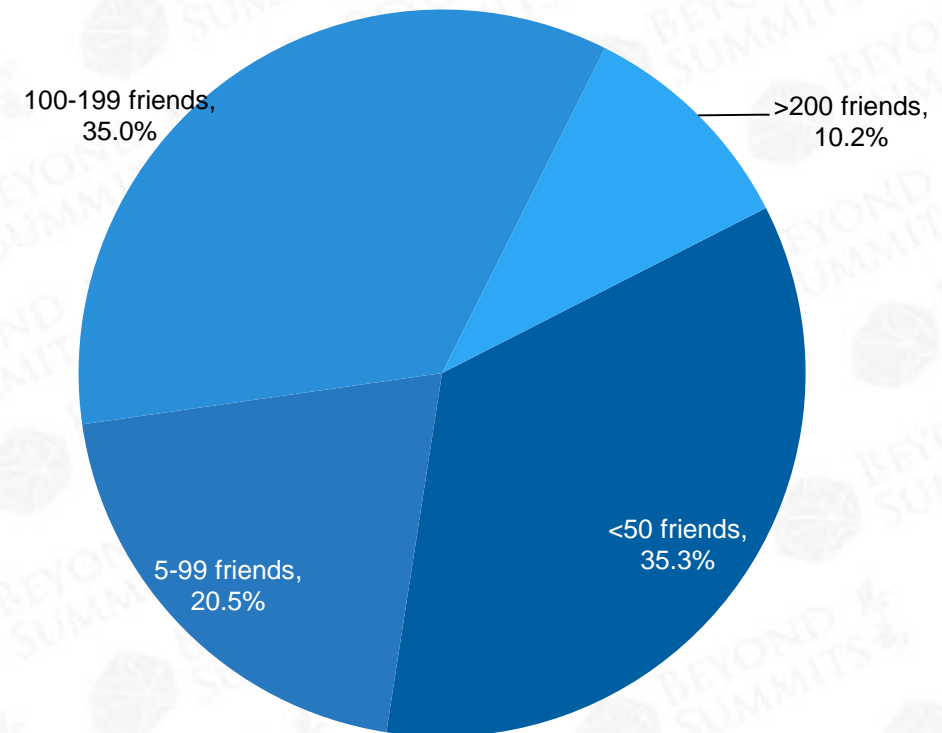
Source: Tencent WeChat data research report 2015

A WeChat user will start and use WeChat for 5-30 times per day, each user have nearly 200 friends.

Average daily starts on WeChat



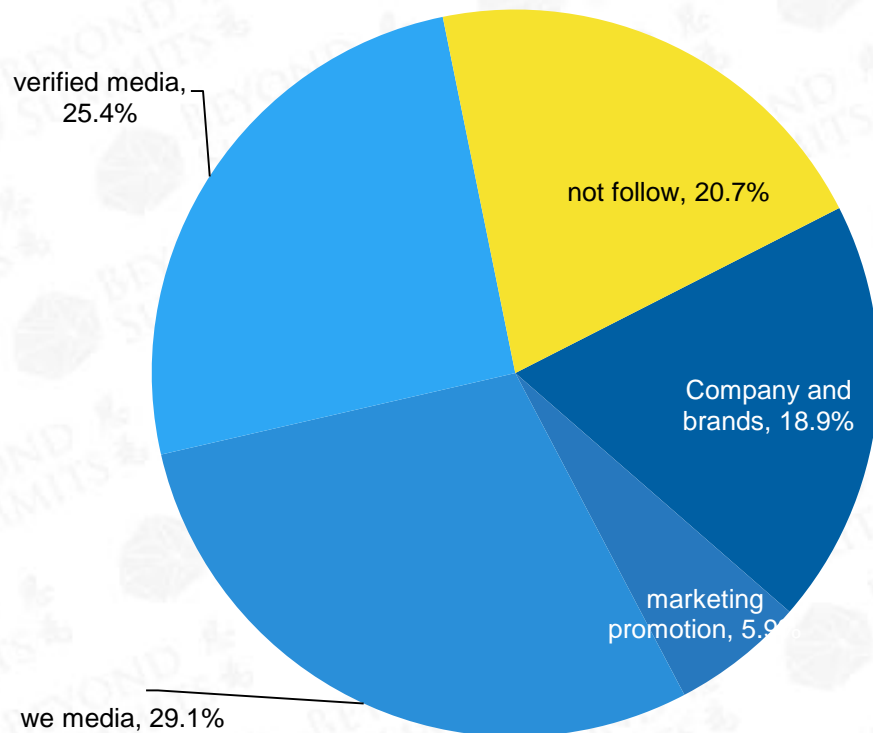
WeChat user's friends scale distribution



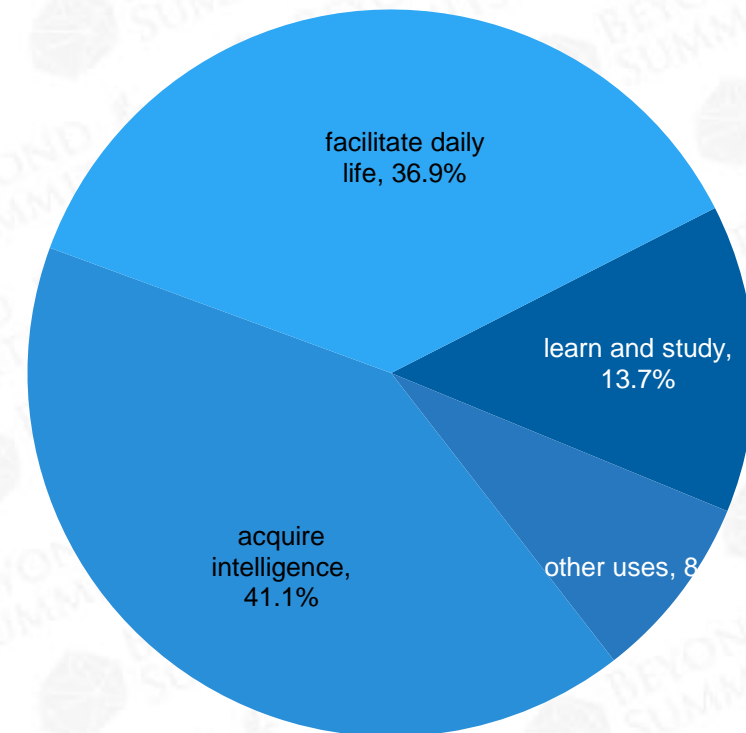
Source: Tencent WeChat data research report 2015

Most of WeChat official accounts are we-media accounts and verified accounts, in order to deliver intelligence and life services to their users.

WeChat official accounts' distribution according to users' following



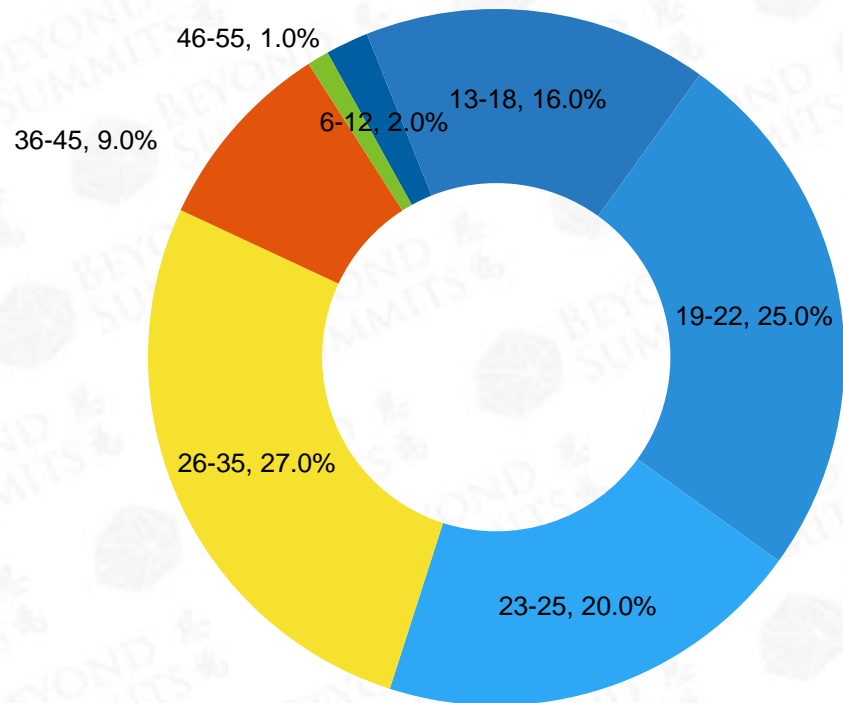
Main purposes for users to follow WeChat official accounts



Source: Tencent WeChat data research report 2015

Weibo: similar to WeChat, Weibo has more male users, aged from 19 to 35 years old. Most of Weibo's users come from Yangtze River Delta and Pearl River Delta regions.

**Weibo active users' age distribution
(years old)**

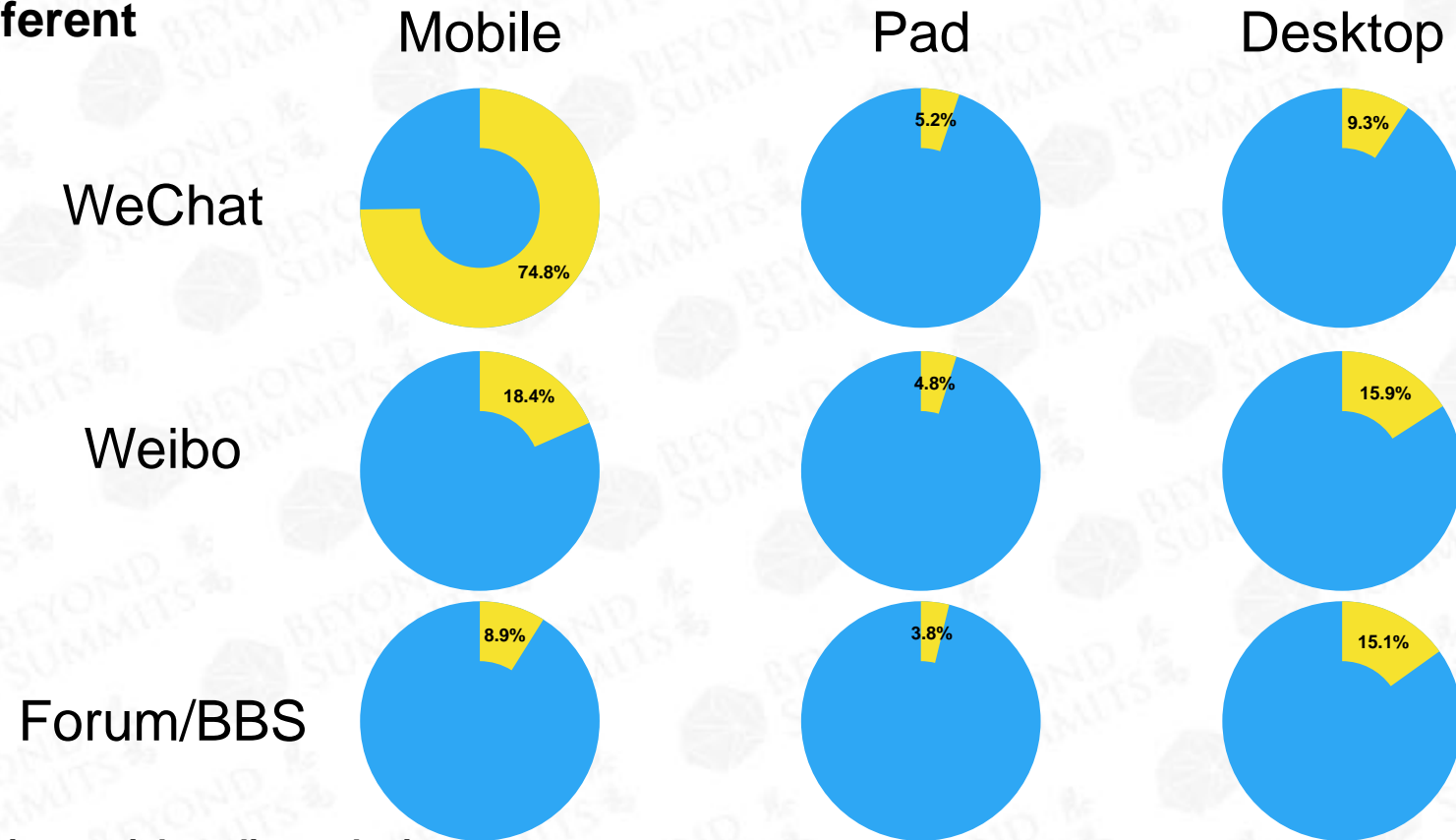


Source: Sina Weibo user report

Male	Female
60.9%	39.1%
Province	Geographic share
Guangdong	10.0%
Beijing	8.7%
Zhejiang	4.4%
Jiangsu	4.2%
Shanghai	3.2%
Sichuan	3.4%
Shandong	3.2%
Henan	3.1%
Hubei	2.8%
Fujian	2.6%

Users tend to play WeChat via cellphone while explore forum/BBS via desktop. The share of play-Weibo-via-mobile is close to the share of play-Weibo-via-desktop.

Different social media's penetration on different ends (%)



Source: KANTAR 2015 China social media marketing report

2015 TOP30 APP in China (till Aug.)

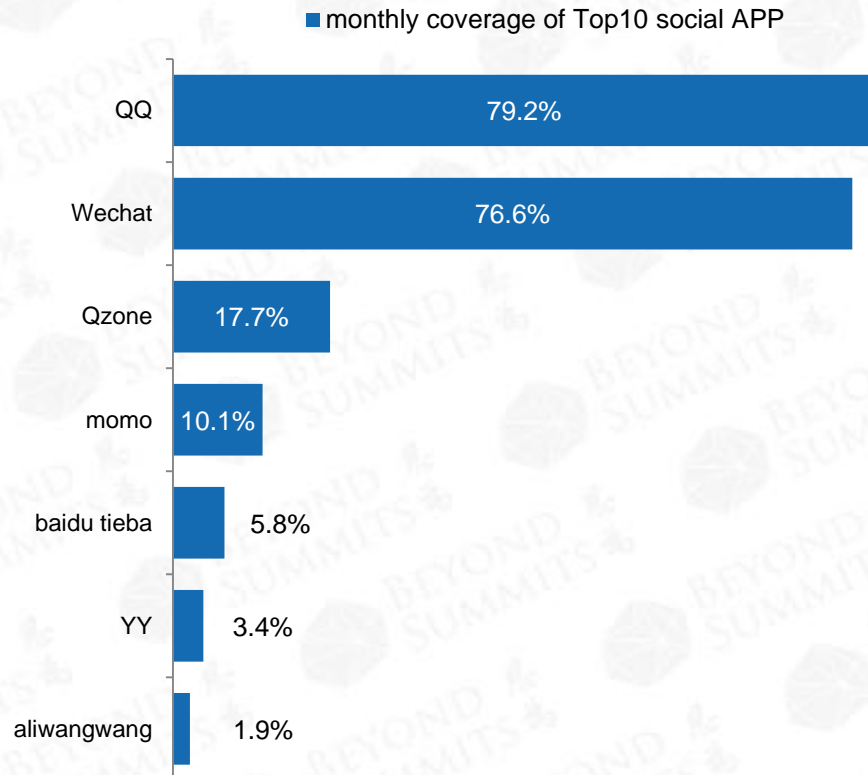
Rank	App name	Monthly Active User # (Aug.)
1	WeChat	560.18 m
2	QQ	417.36 m
3	Mobile Baidu	214.11 m
4	Taobao	164.35 m
5	Sogou pinyin	143.36 m
6	QQ browser	134.31 m
7	QQ video	129.64 m
8	Baidu mobile assistant	129.29 m
9	Baidu mobile browser	127.93 m
10	UC browser	127.80 m
11	iQiyi video	125.69 m
12	Youku	118.63 m
13	Baidu map	105.95 m
14	360 shouji	104.51 m
15	alipay	102.14 m

Rank	App name	Monthly Active User # (Aug.)
16	QQ music	97.80 m
17	Tencent news	94.87 m
18	Sina Weibo	93.05 m
19	Sohu video	77.64 m
20	Kugou music	77.39 m
21	QQ mobile assistant	74.26 m
22	Toutiao	74.19 m
23	QQ pim	73.55 m
24	Sohu news	70.33 m
25	Lianwifi	65.71 m
26	Kuwo music	60.86 m
27	Myapp	60.42 m
28	Baofeng	59.97 m
29	163.News	58.59 m
30	Momo	57.88 m

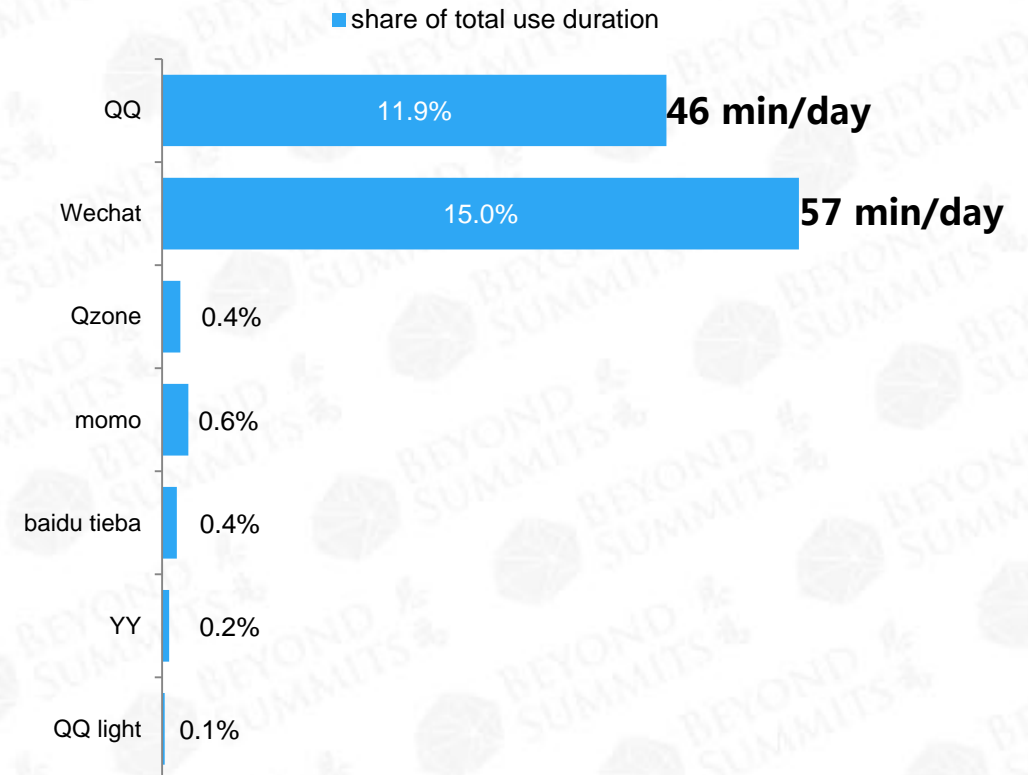
Source: enfodesk mobile APP rank 2015 Aug.

In mobile social APP area, QQ has the largest user scale while WeChat has the longest using duration. The performance of those two are far ahead of other competitors.

China mobile social APP rank



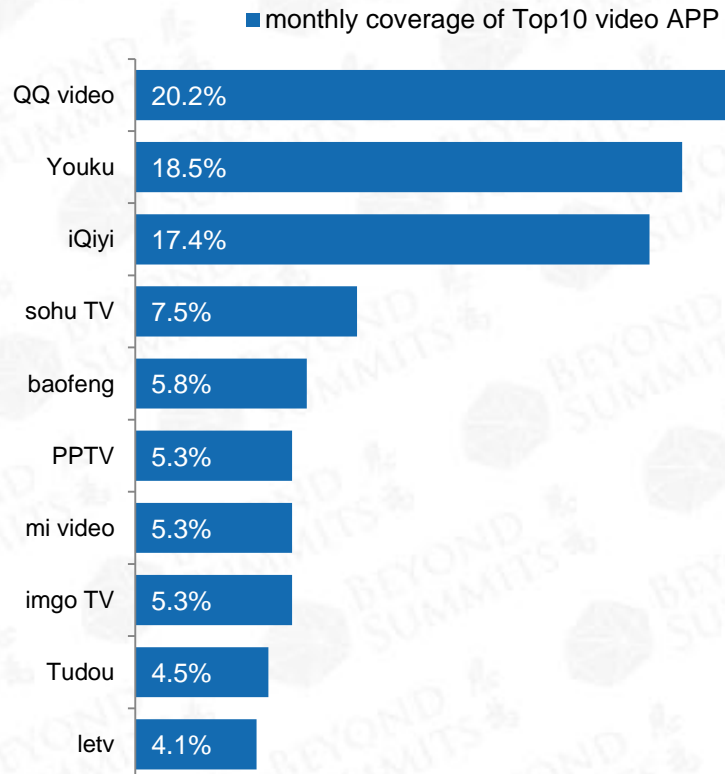
China mobile social APP rank



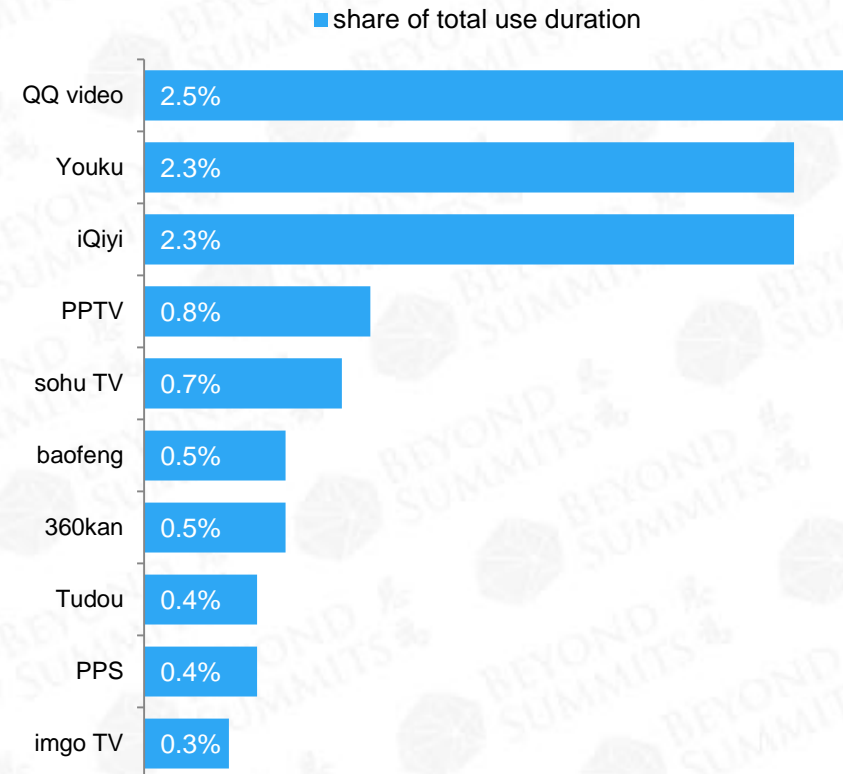
Source: Trustdata 2015H1 China mobile Internet development report

Tencent, Youku and iQiyi are the Top3 mobile video APPs in China market.

China mobile video APP rank



China mobile video APP rank

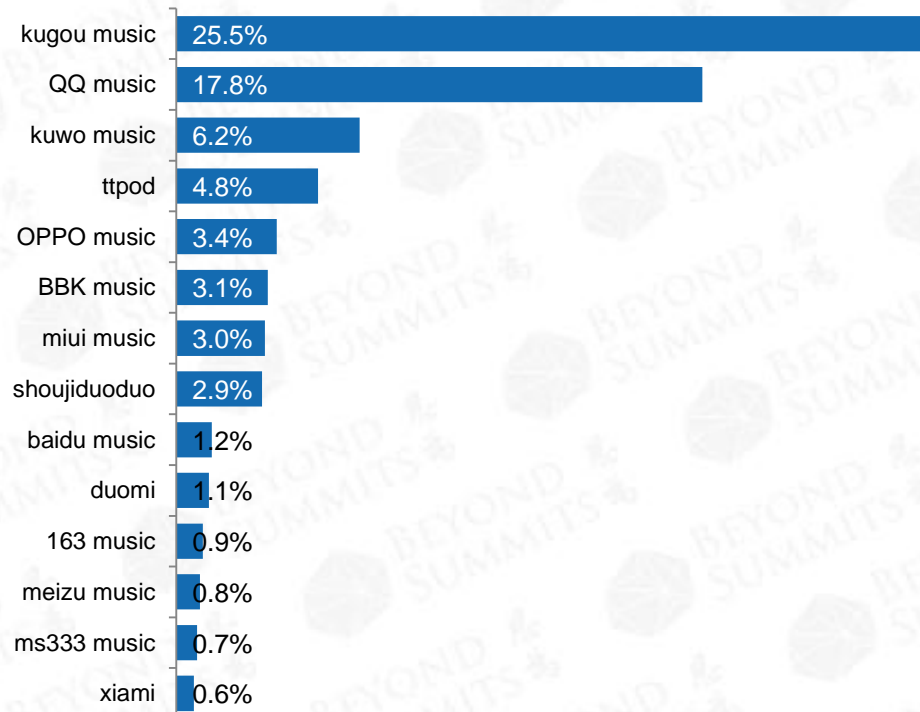


Source: Trustdata 2015H1 China mobile Internet development report

Kugou music, QQ music and kuwo music are the Top3 music APPs.

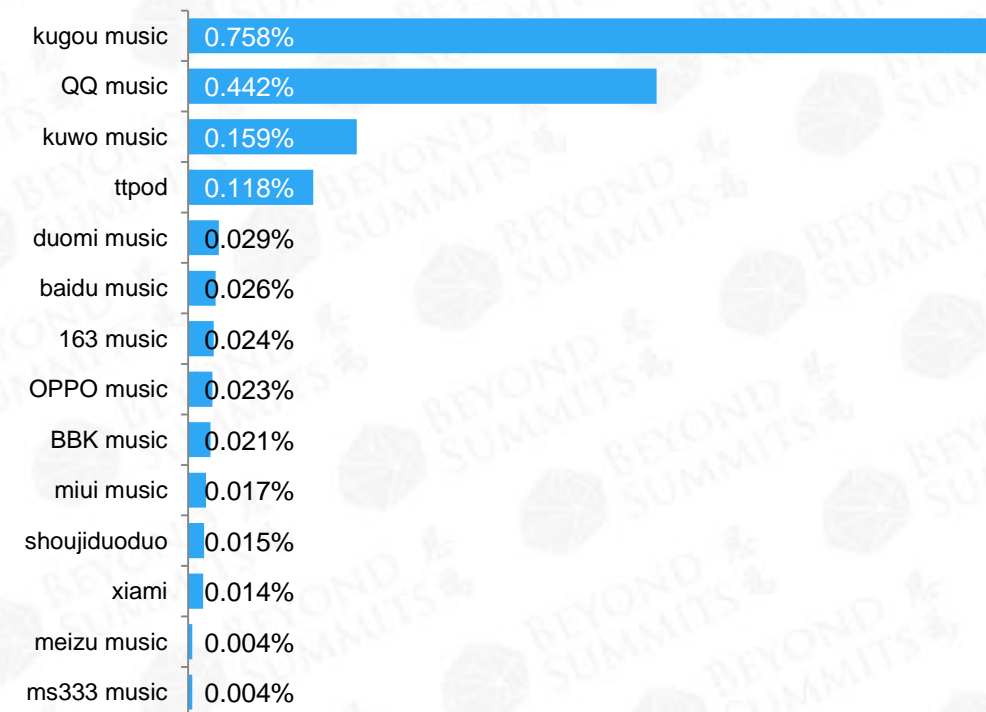
China mobile music APP rank

■ monthly coverage of Top10 music APP



China mobile music APP rank

■ share of total use duration

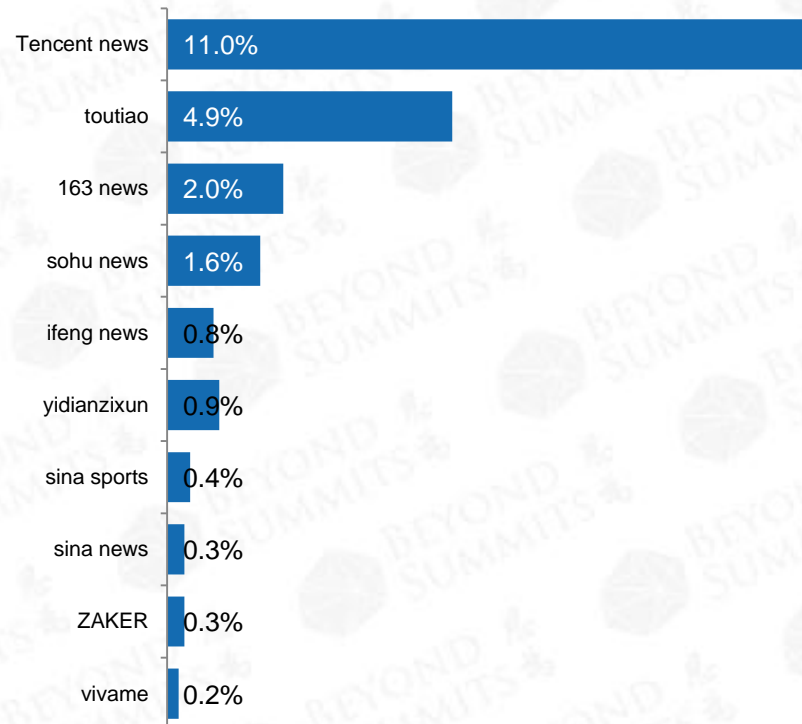


Source: Trustdata 2015H1 China mobile Internet development report

The Top5 mobile news APP are Tencent news, Toutiao, 163 news, Sohu news and Ifeng news.

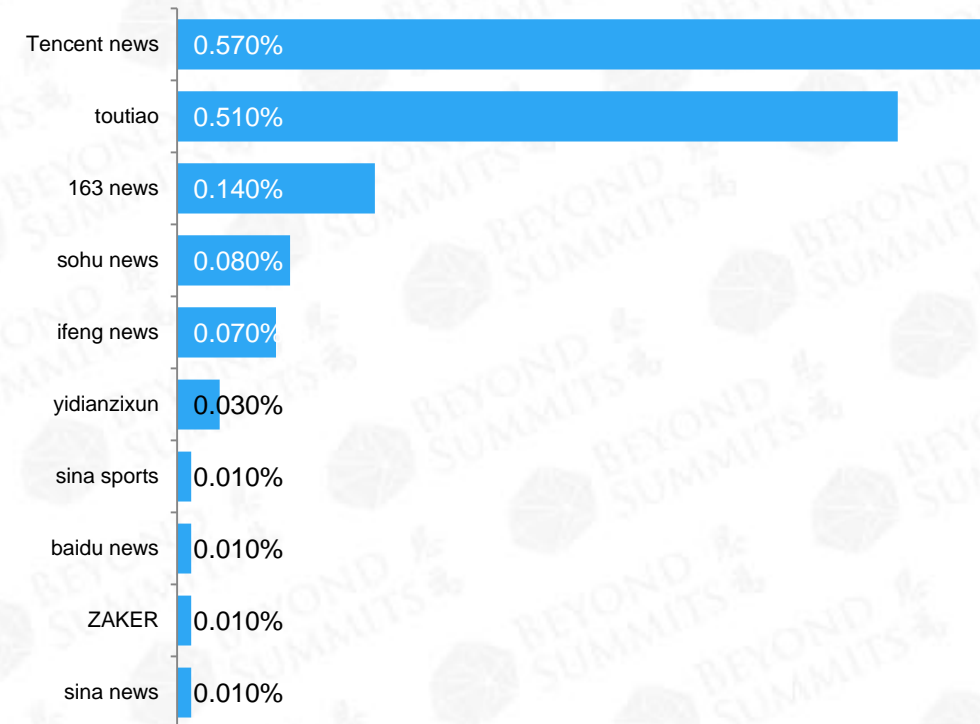
China mobile news APP rank

■ monthly coverage of Top10 news APP



China mobile news APP rank

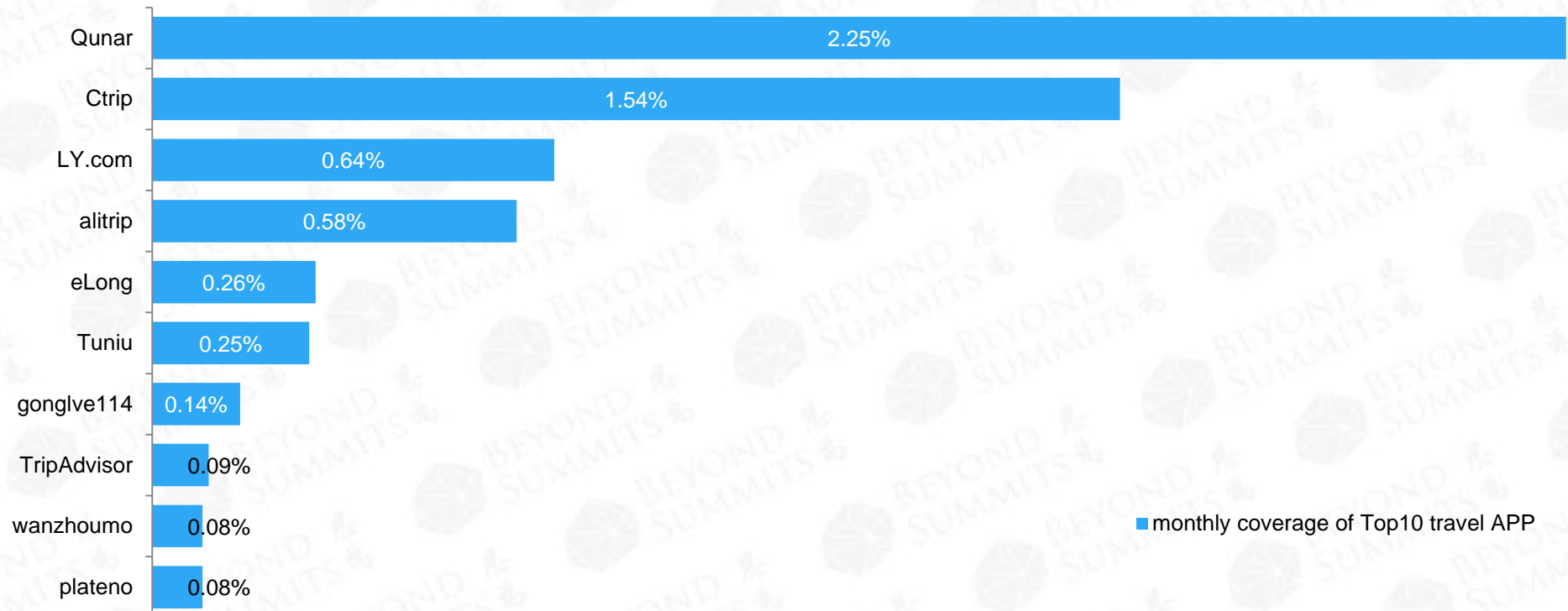
■ share of total use duration



Source: Trustdata 2015H1 China mobile Internet development report

Qunar and Ctrip has merged in October 2015, which makes it become China's largest mobile travel APP.

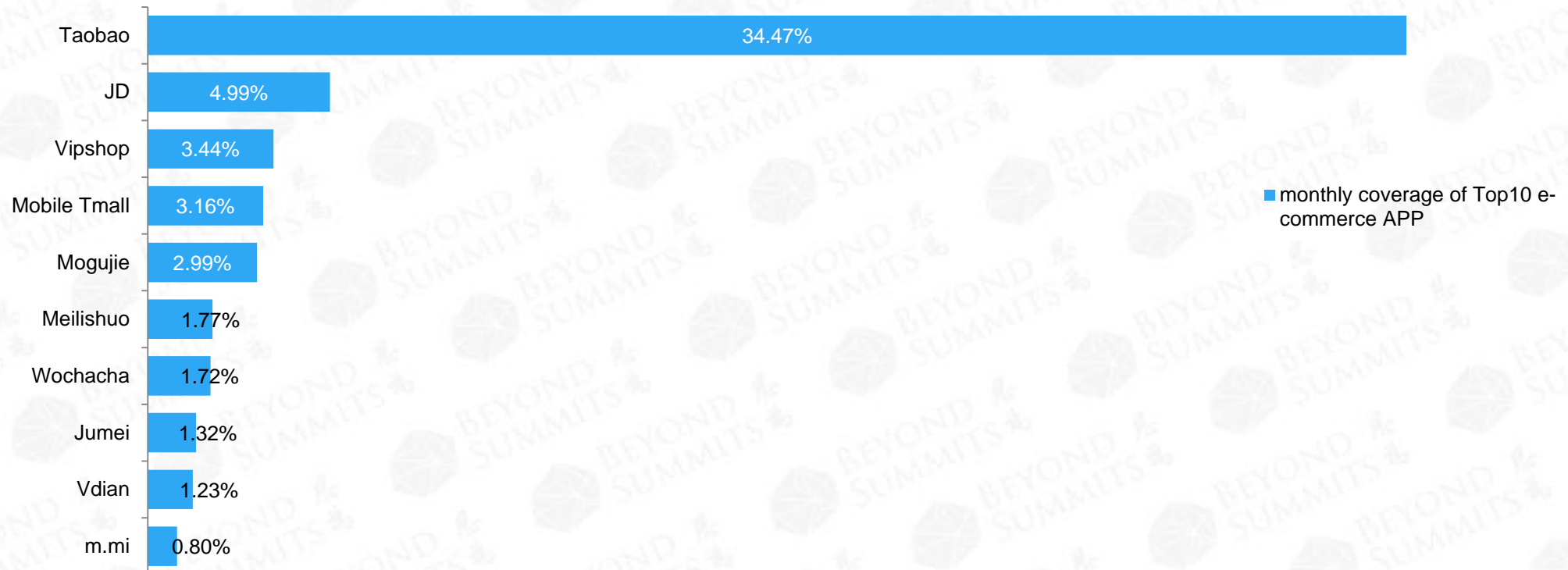
China mobile travel APP rank



Source: Trustdata 2015H1 China mobile Internet development report

In mobile e-commerce area, Taobao APP ranks far ahead of any other APPs.

China mobile e-commerce APP rank



Source: Trustdata 2015H1 China mobile Internet development report

2015 China Overview, covering Chinese economy, media and markets, is a set of yearly research report conducted and published by Beyond Summits Ltd, a leading all-media total solution provider focused on cross-border brand building & destination marketing in China. This report aims to summarize domestic industries' status in 2015, introduce Chinese market knowledge to overseas stakeholders, and propose Chinese market insights. The whole set of China Overview includes 20 sub-topics including economy, city, people, the rich, luxury, investment, auto, tourism, immigration and cross-border business, as well as Chinese all media, internet, mobile internet, social media, TV, radio, print, OOH, movie and airport.

This report is the full version of 2014-2015 China Overview Social Media Research. More reports can be downloaded from Beyond Summits' official website link: http://www.beyondsummits.com/reports_downloading

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