

# Mobile Internet

## Summary :

- As of December 2017, the number of China's mobile Internet users reached 753 million, an increase of 57.34 million over the end of 2016. The proportion of netizens using mobile phones continues to climb to 97.5%.
- In 2017, the total number of monthly active devices of China's Mobile Internet was stable at more than 1 billion, but the year-on-year growth rate showed a declining trend month by month, which indicated that the demographic dividend was almost exhausted.
- From 2015 to 2017, China's mobile intelligent terminal has been continuously penetrating in third-tier cities and below. Mobile Internet has been widely used.
- In Dec 2017, the proportion of female mobile intelligent terminal users increased slightly to 46.8%. Moreover, China's mobile intelligent terminal users were still dominated by young people. The proportion of users under 35 years old accounted for 69.9%. However, the proportion of users aged over 36 years old continued to rise. Mobile intelligent terminal users from Top 10 provinces of China accounted for nearly 60% of the total. Among them, Guangdong, Jiangsu, Henan have the highest proportion of users.

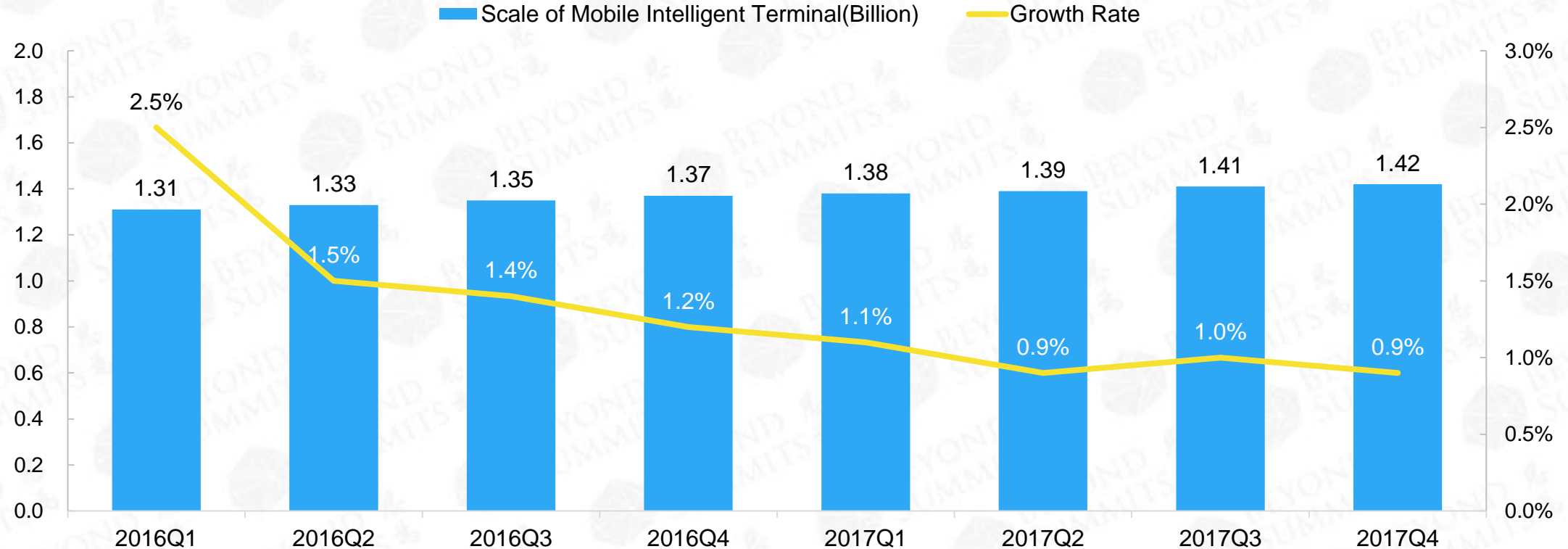
## Summary :

- In 2017, the monthly using time of China's mobile Internet users grew slowly. The per capita daily using time has only increased by 8.7 minutes, showing that the dividend period of Internet has passed.
- In popular industries such as social networking, shopping, music, news and video, the concentration ratio of users' using time of the TOP3 Apps of these industries are over 50%, especially in mobile social networking.
- In December 2017, China's mobile Internet users spent the longest time in social network Apps among all types of Apps, with the average daily using time reaching more than 2 hours. Next came online video, news and information.
- Of the total time spent by mobile Internet users in using apps, WeChat accounted for a quarter, much longer than other apps. Followed by Tencent video and QQ, accounted for 4.3% and 4.1% respectively.



The quarterly growth rate of China's mobile intelligent terminals slowed down. In the fourth quarter of 2017, the number of China's mobile intelligent terminal increased to 1.42 billion, a year-on-year growth rate of 0.9%.

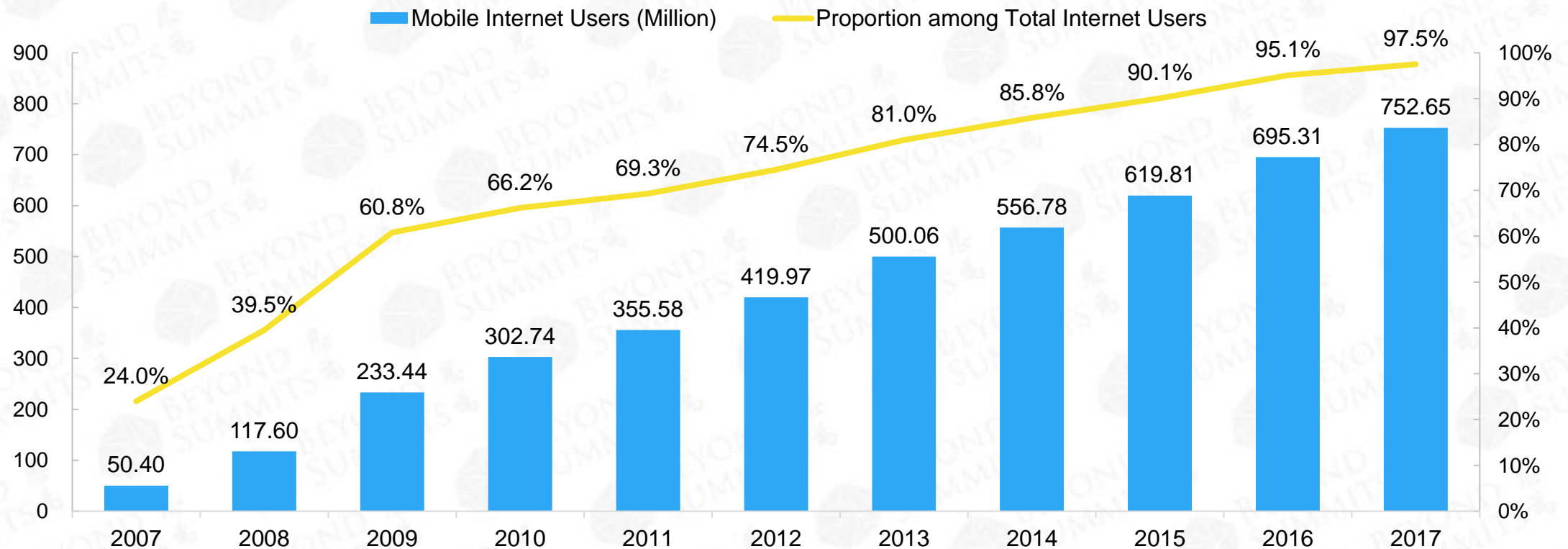
### 2016Q1-2017Q4 Scale of China's Mobile Intelligent Terminal



Source: CNNIC

As of December 2017, the number of China's mobile Internet users reached 753 million, an increase of 57.34 million over the end of 2016. The proportion of netizens using mobile phones continues to climb to 97.5%.

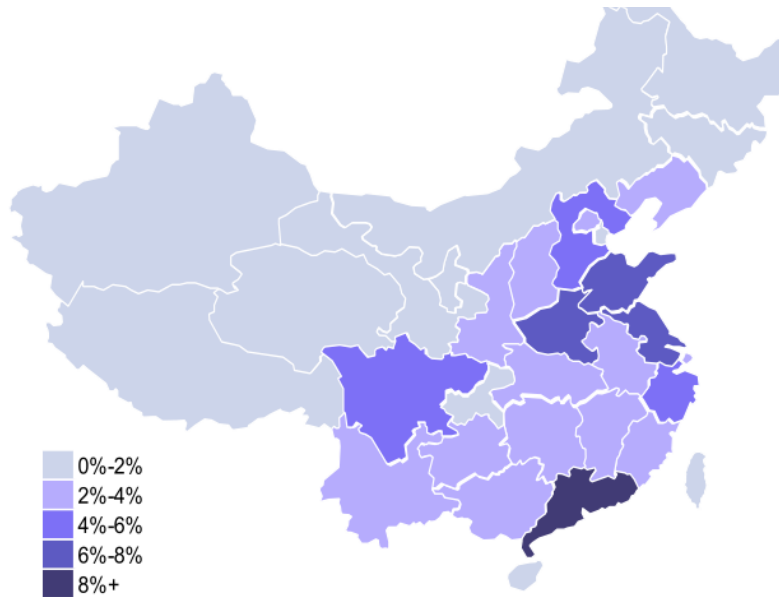
### 2007-2017 China Mobile Internet Users



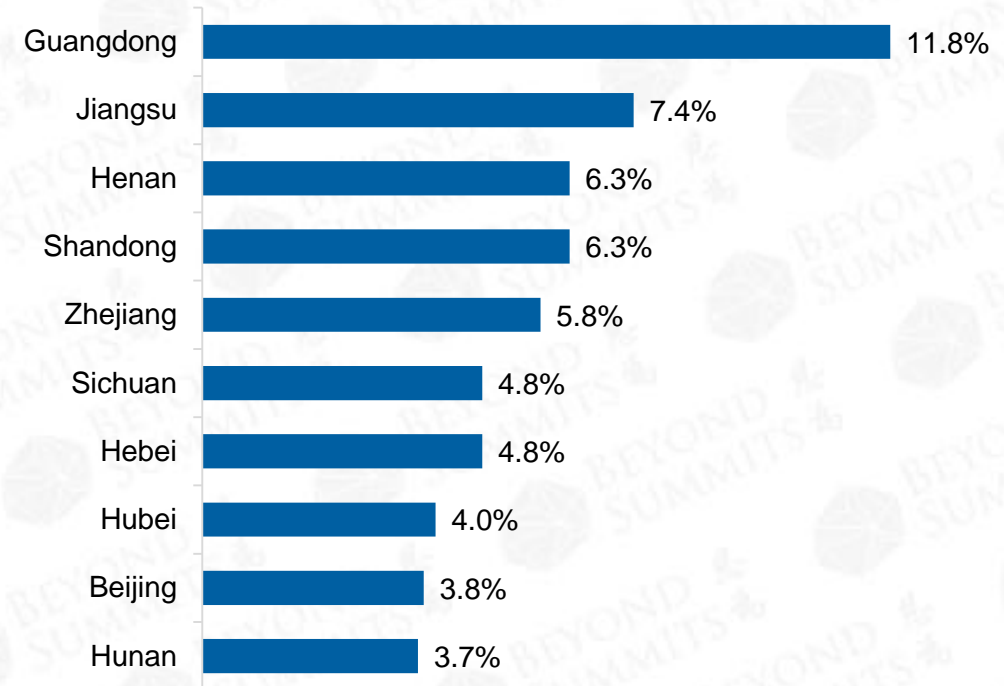
Source: CNNIC

By the end of 2017, Mobile intelligent terminal users from Top 10 provinces of China accounted for nearly 60% of the total. Among them, Guangdong, Jiangsu, Henan have the highest proportion of users.

### 2017 Proportion of Provinces of China's Mobile Intelligent Terminal Users



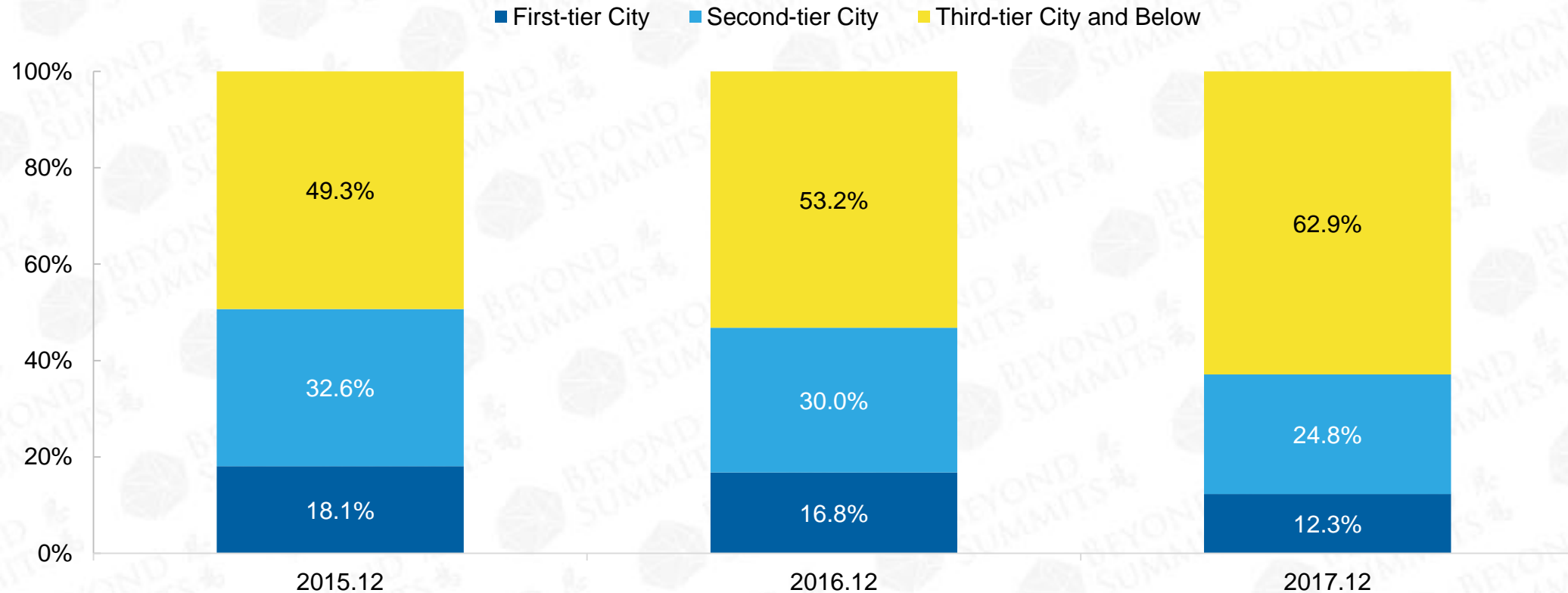
### 2017 TOP 10 Provinces of China's Mobile Intelligent Terminal Users



Source: TalkingData

From 2015 to 2017, China's mobile intelligent terminal has been continuously penetrating in third-tier cities and below. Mobile Internet has been widely used.

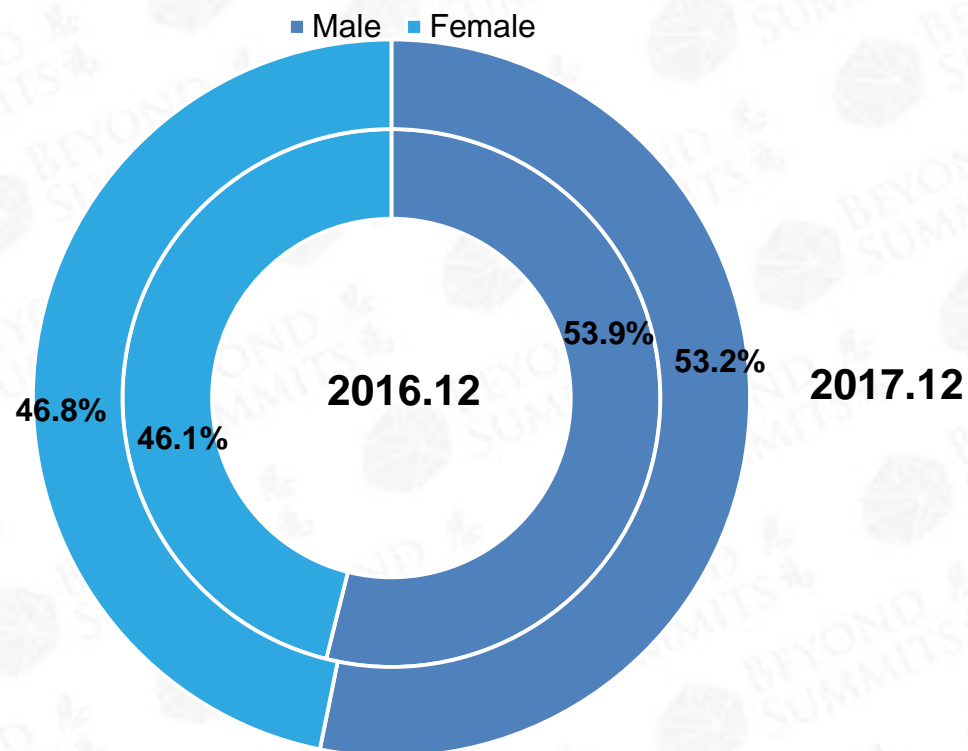
### City Distribution and Change of China's Mobile Intelligent Terminal Users



Source: TalkingData

In Dec 2017, the proportion of female mobile intelligent terminal users increased slightly to 46.8%.

### Gender Ratio of China's Mobile Intelligent Terminal Users ( 2016.12 VS 2017.12 )



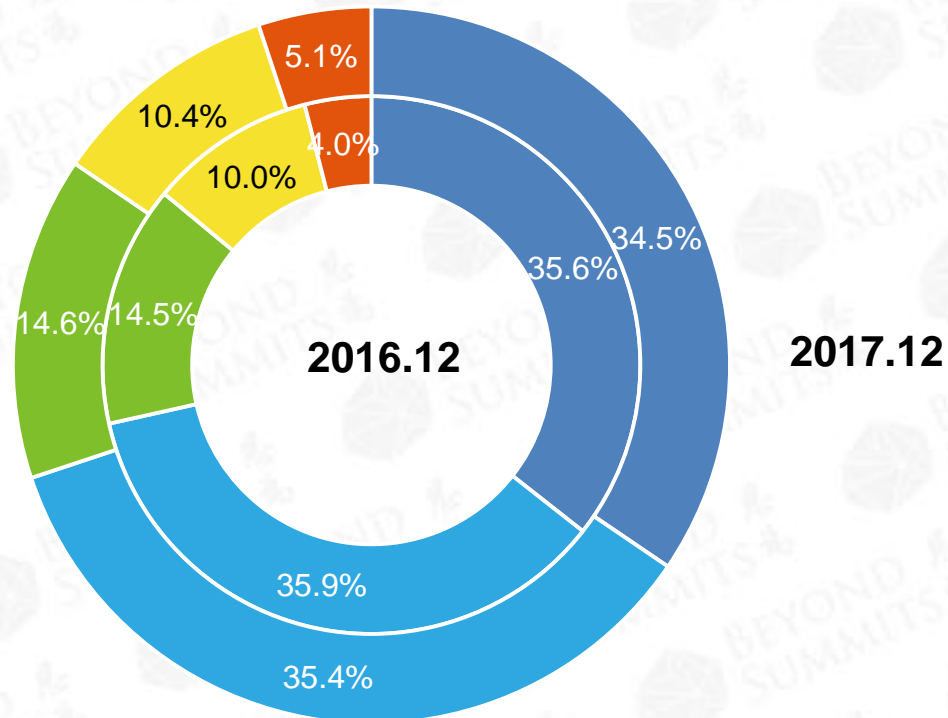
Source: TalkingData



In 2017, China's mobile intelligent terminal users were still dominated by younger people. The proportion of users under 35 years old accounted for 69.9%. However, the proportion of users aged over 36 years old continued to rise.

### Age Structure of China's Mobile Intelligent Terminal Users ( 2016.12 VS 2017.12 )

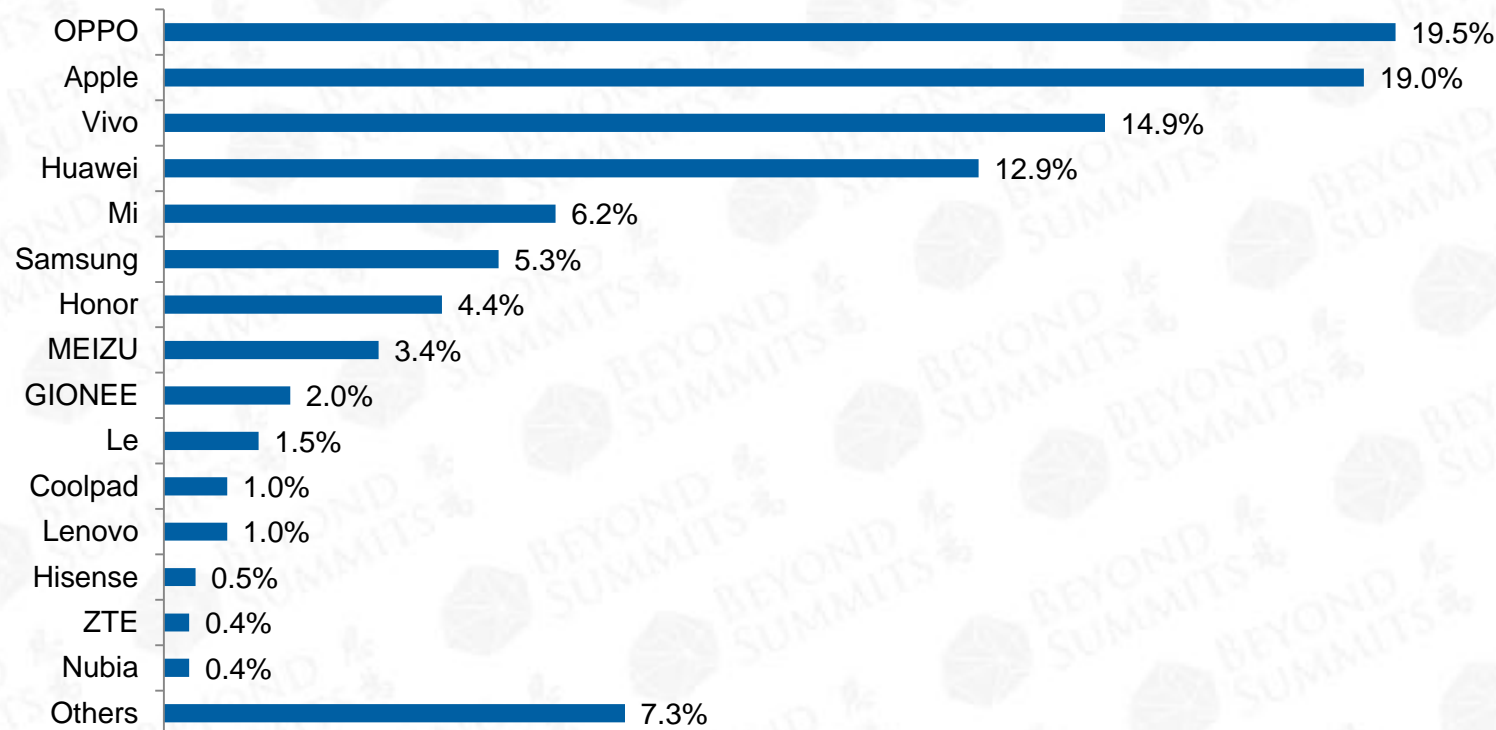
■ Below 26 ■ 26-35 ■ 36-45 ■ 46-55 ■ Above 55



Source: TalkingData

In the first half of 2017, domestic mobile phone brand OPPO has surpassed Apple, becoming the No.1 brand in terms of the number of smartphone ownership.

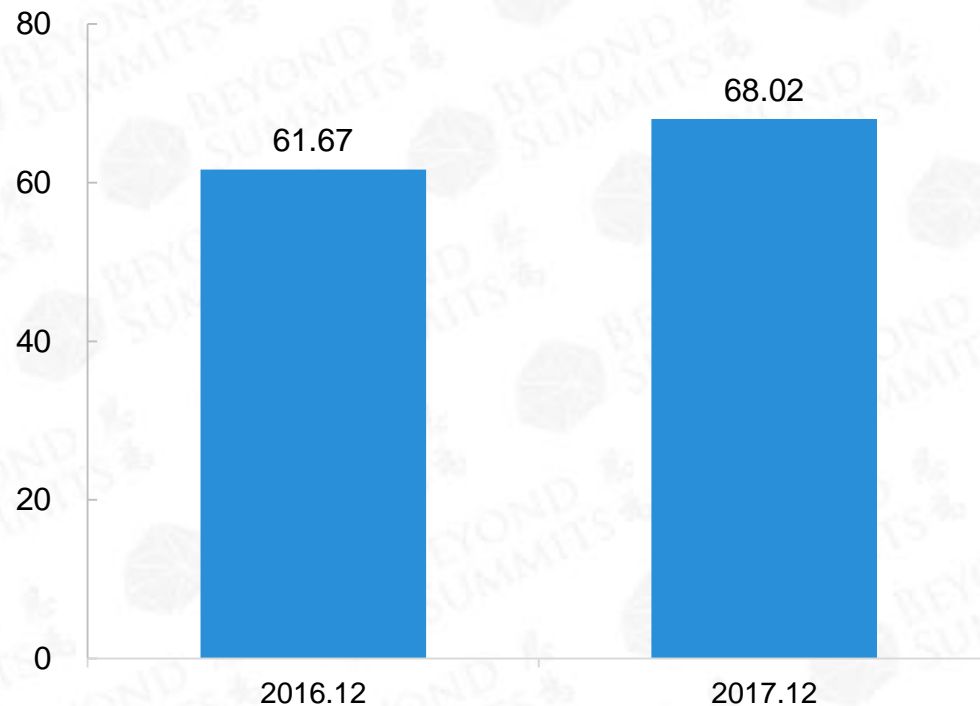
### 2017 H1 Smartphone Ownership TOP 15



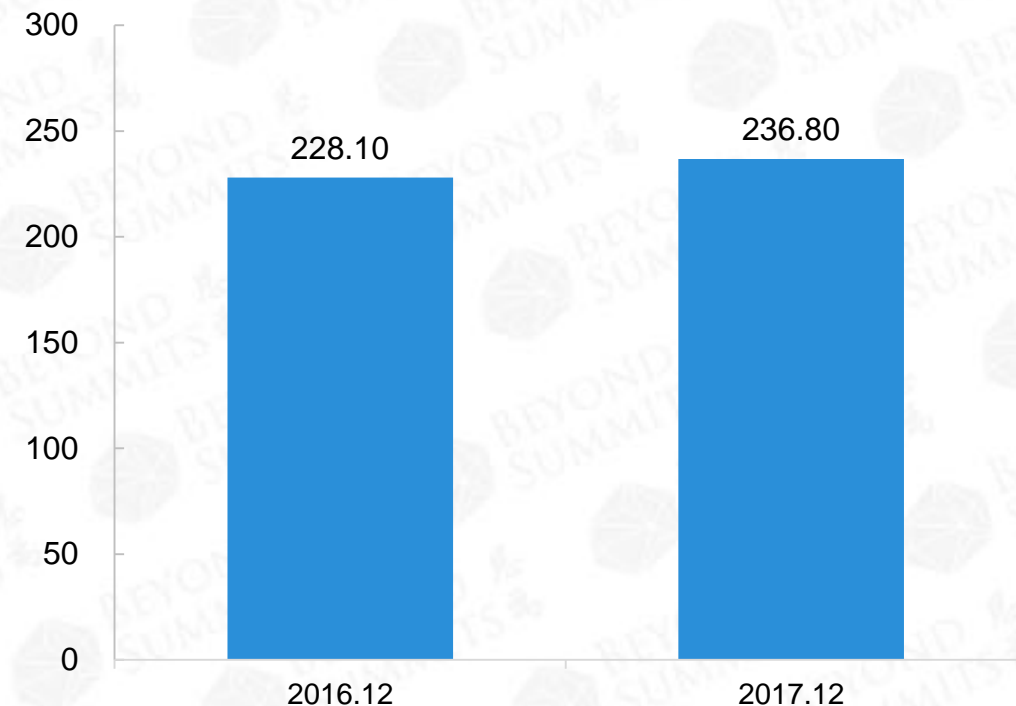
Source: Trustdata

In 2017, the monthly using time of China's mobile Internet users grew slowly. The per capita daily using time has only increased by 8.7 minutes, showing that the dividend period of Internet has passed.

**China's Mobile Internet Users' Monthly Using Time (Hundred Billion Minute)**



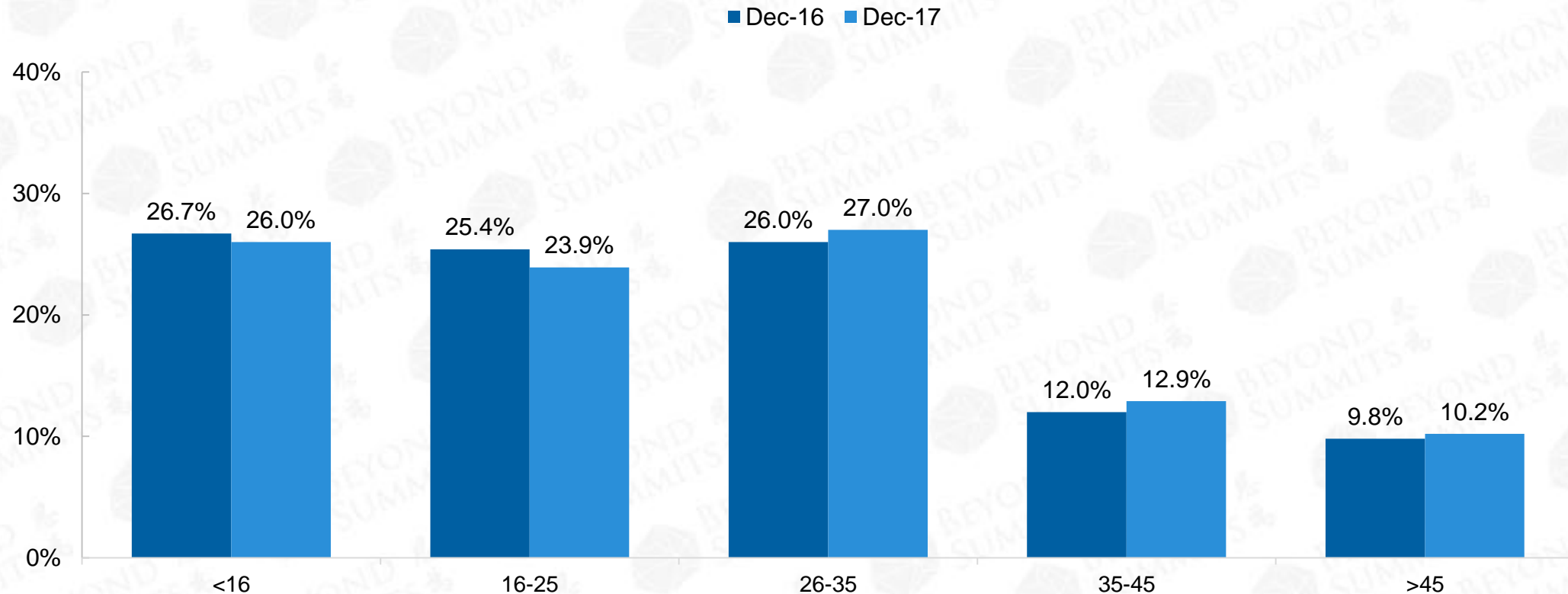
**China's Mobile Internet Users' Per Capita Daily Using Time (Minute)**



Source: QuestMobile

The total number of China's Apps exceeds 4.06 million. Seen from users' usage demands, 35 Apps are enough to meet the diversified demands of 80% of users.

### Number of APPs Installed by China's Mobile Internet Users

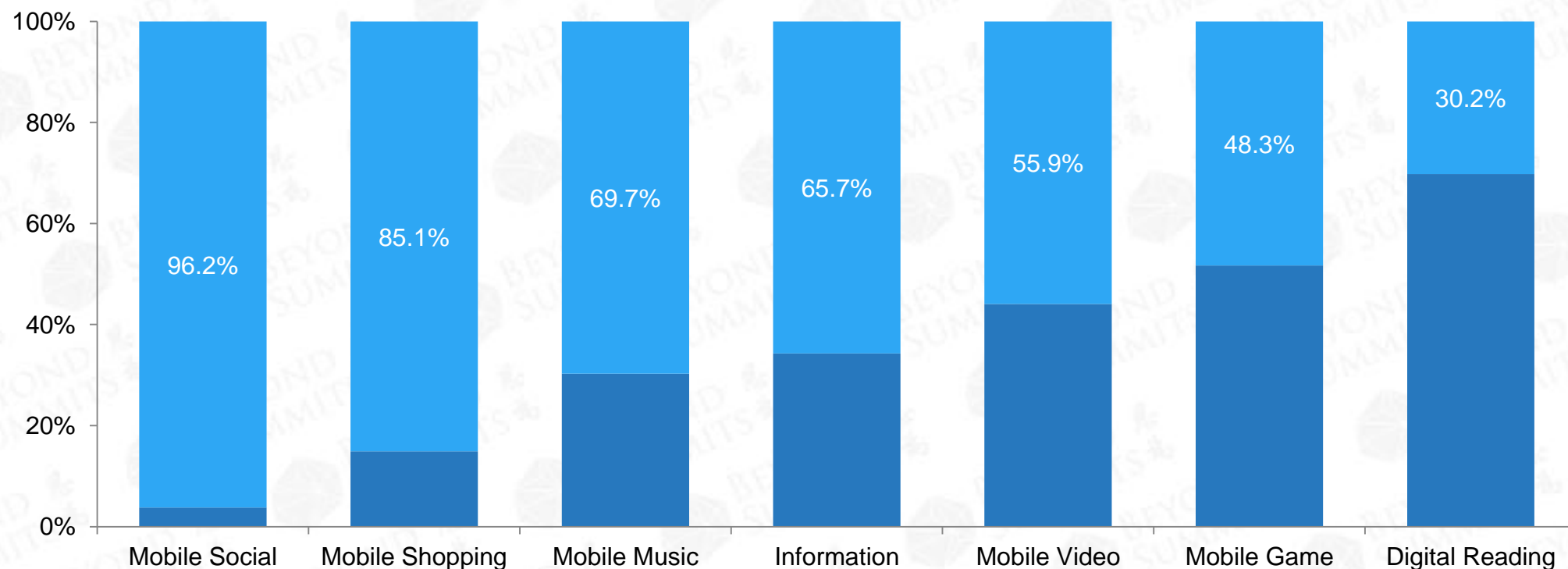


Source: QuestMobile



The concentration ratio of users' using time of the TOP3 Apps in popular industries, such as social networking, shopping, music, news and video, are over 50%, especially in mobile social networking.

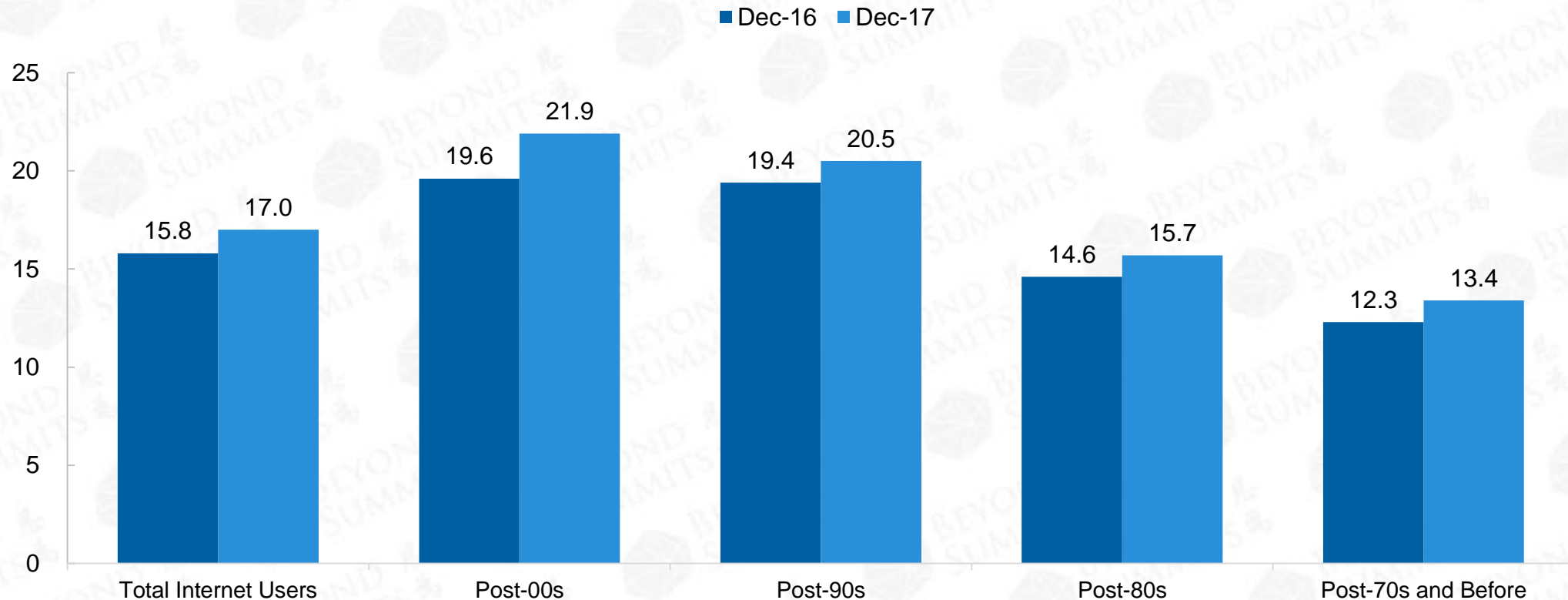
### 2017 APP Users' Concentration Ratio of Using Time in Main Industries



Source: QuestMobile

Compared with the total Internet users, the number of Apps used by post-00s and post-90s were larger.

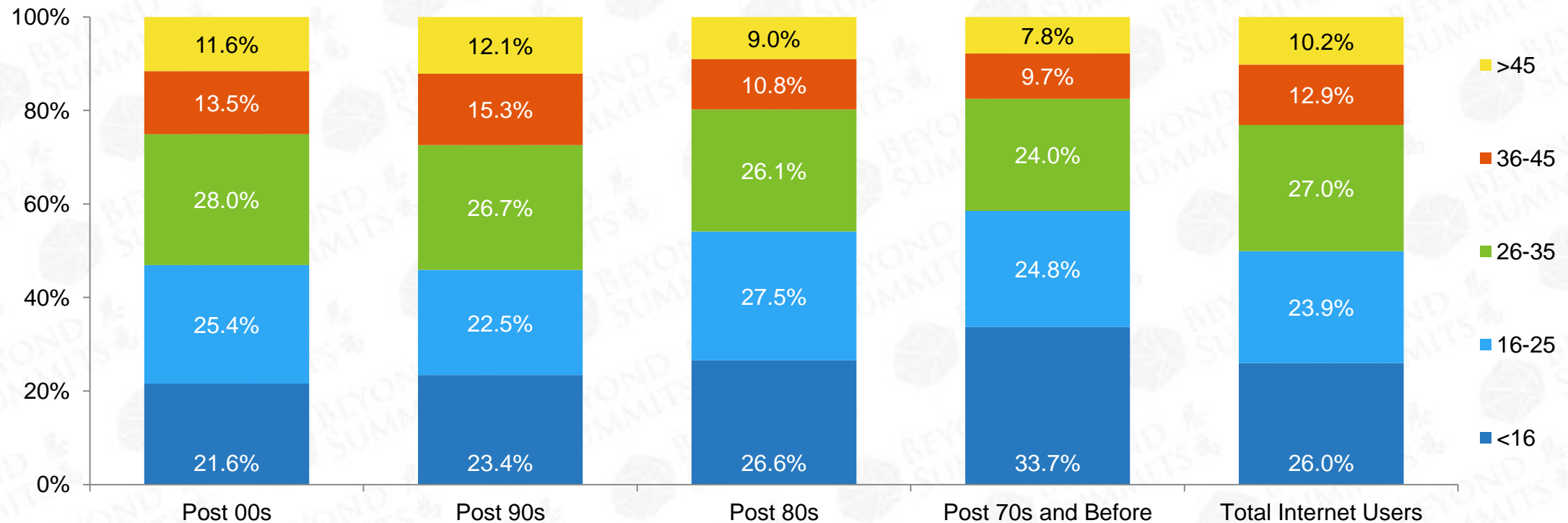
### Average Number of Apps Used by China's Mobile Internet Users



Source: QuestMobile

Younger people are more willing to try new things. The proportion of post-90s installing more than 45 apps was much higher than that of other age groups.

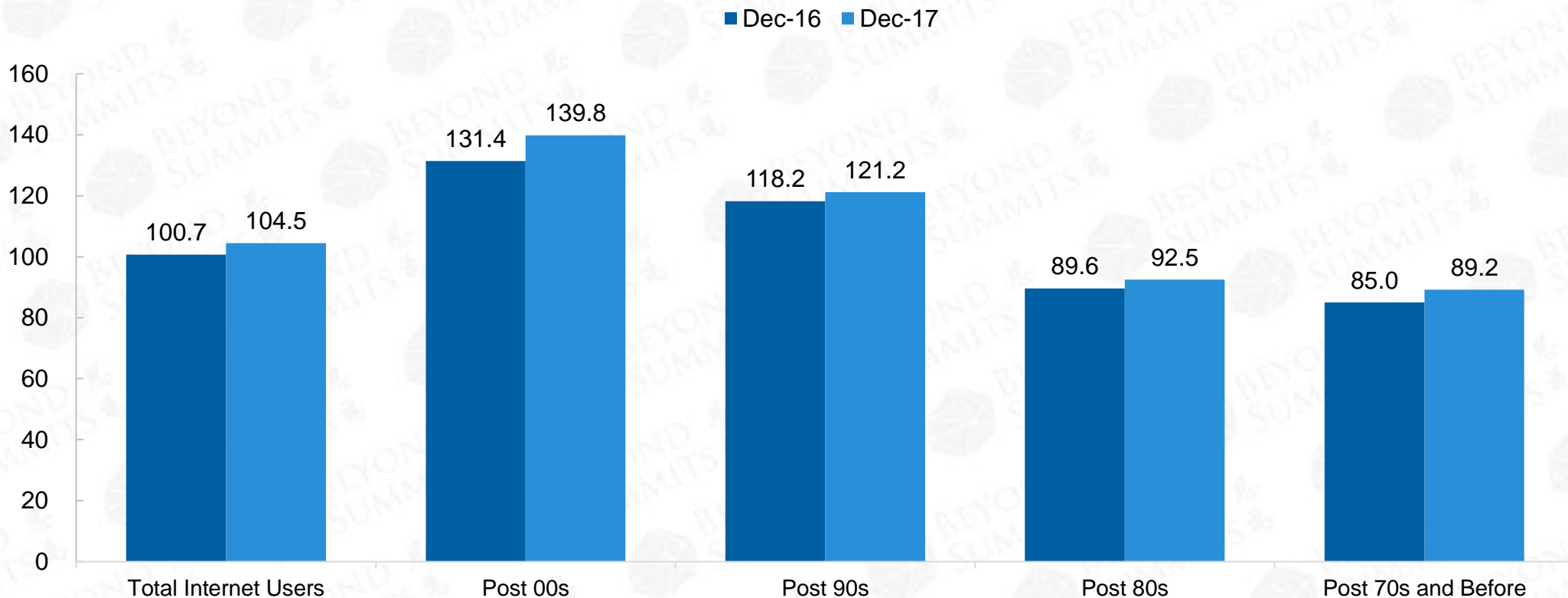
**2017 Number of APPs Installed by Internet Users of Different Ages**



Source: QuestMobile

With the continuous penetration of the mobile Internet, the monthly per capita using time of China's mobile Internet users reached 104.5 hours in December 2017. Among them, post-00s and post-90s' using time were much longer, with post-00s' using time increasing most.

**China's Mobile Internet Users' Per Capita Monthly Using Time (Hour)**

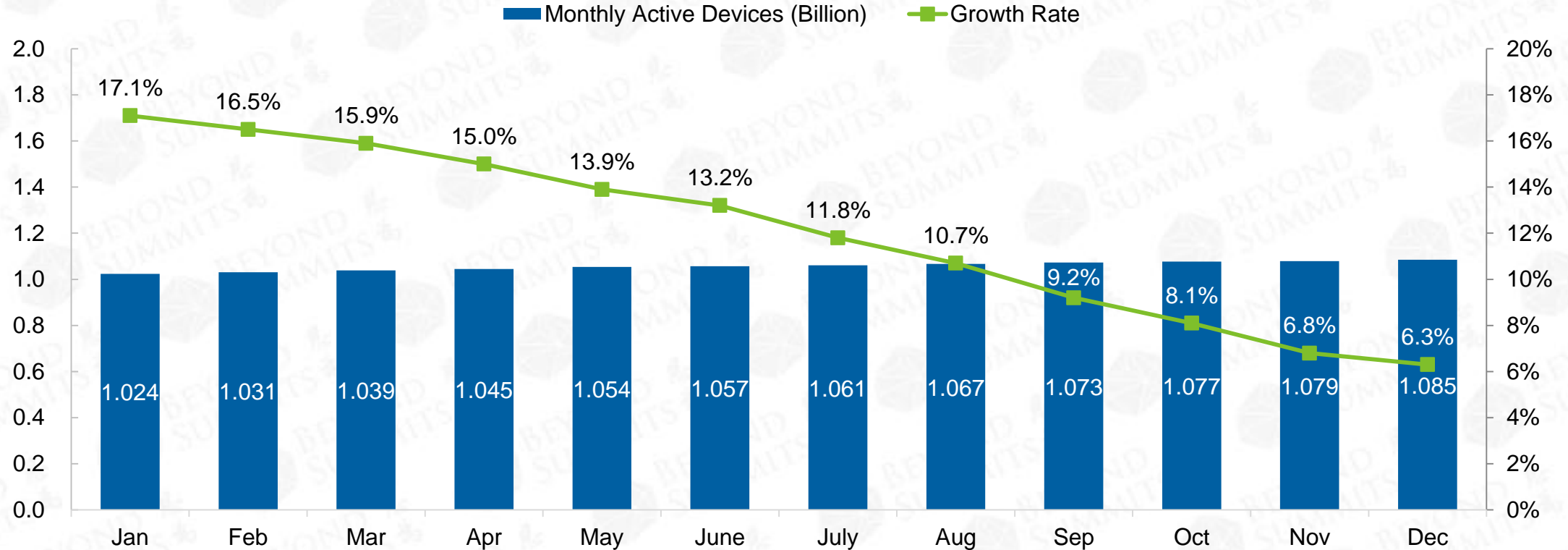


Source: QuestMobile



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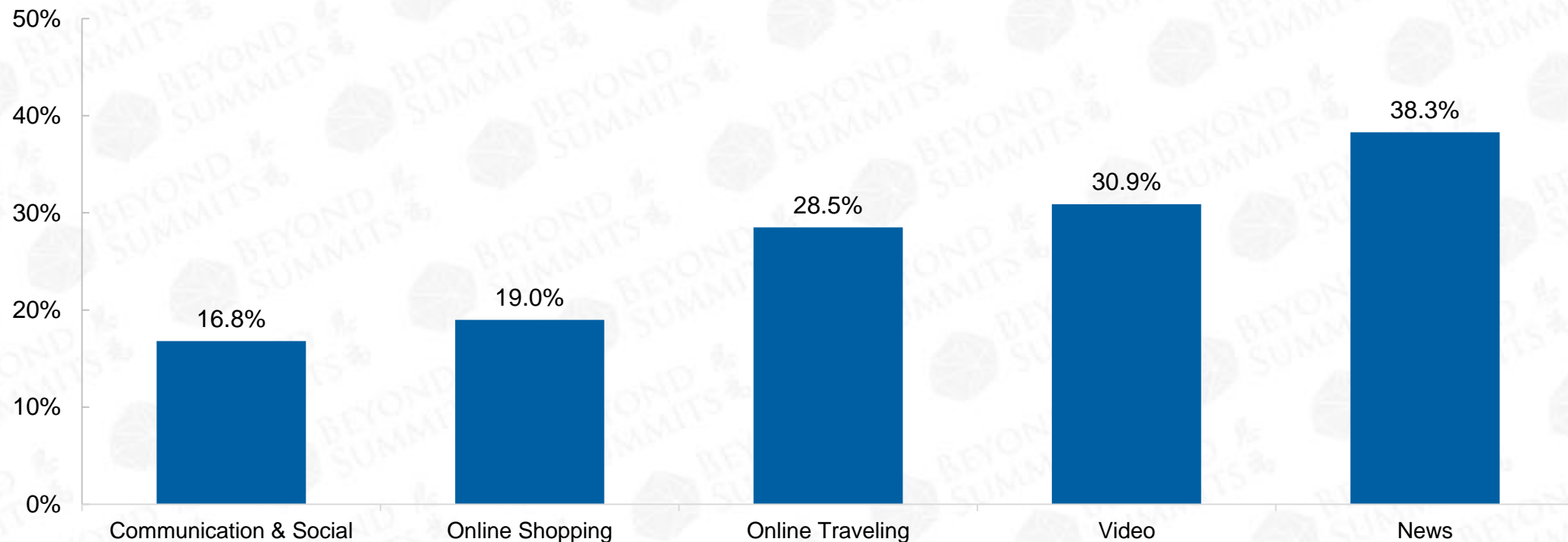
**2017 Jan-Dec The Number of Monthly Active Devices of Mobile Internet**



Source: QuestMobile

In 2017, the coverage rate of leading apps of the mobile Internet was relatively high. The Top 5 apps in the sub-industries have covered the mainstream users of the industry.

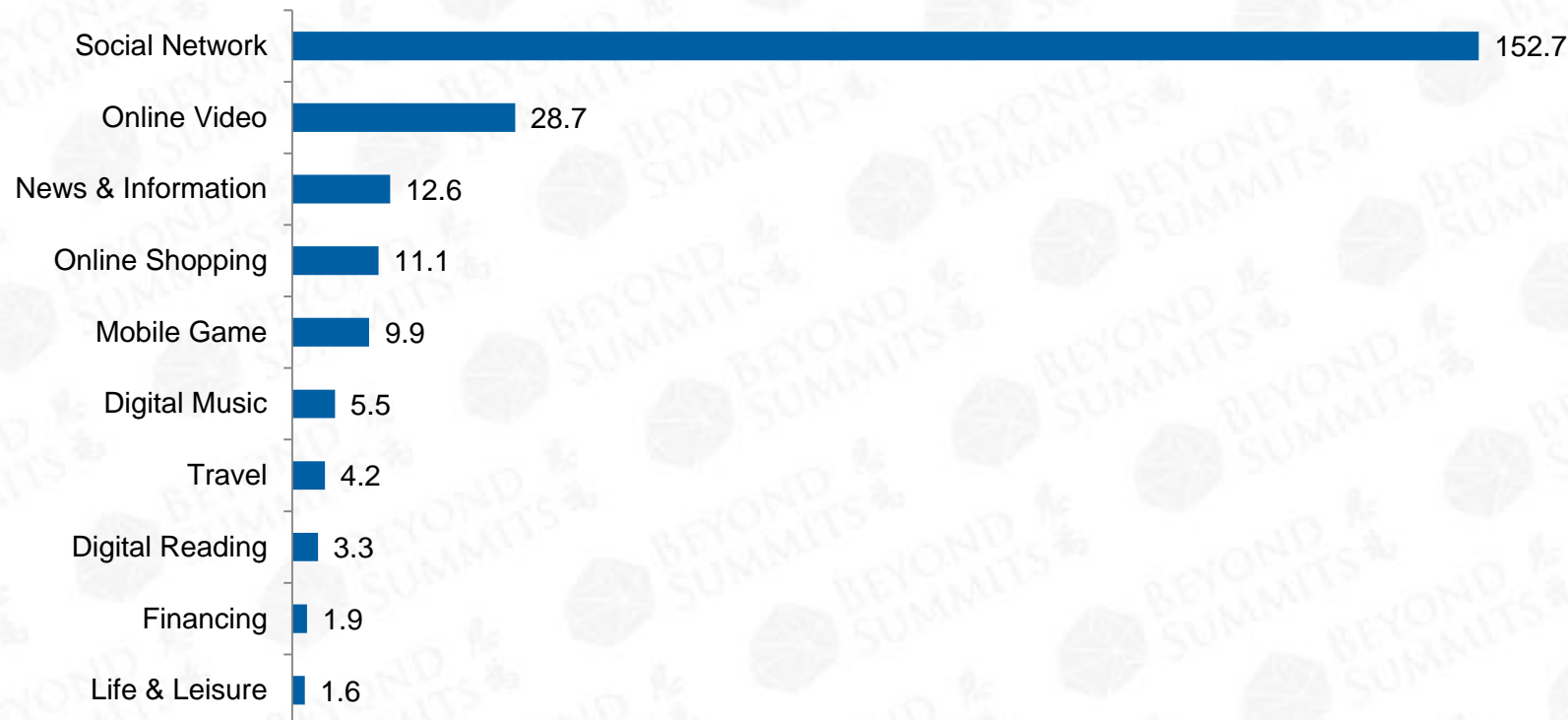
**Coverage Rate of Mobile APPs in TOP 5 Sub-Industries in 2017**



Source: TalkingData

In December 2017, China's mobile Internet users spent the longest time in social network Apps among all types of Apps, with the average daily using time reaching more than 2 hours. Next came online video, news and information.

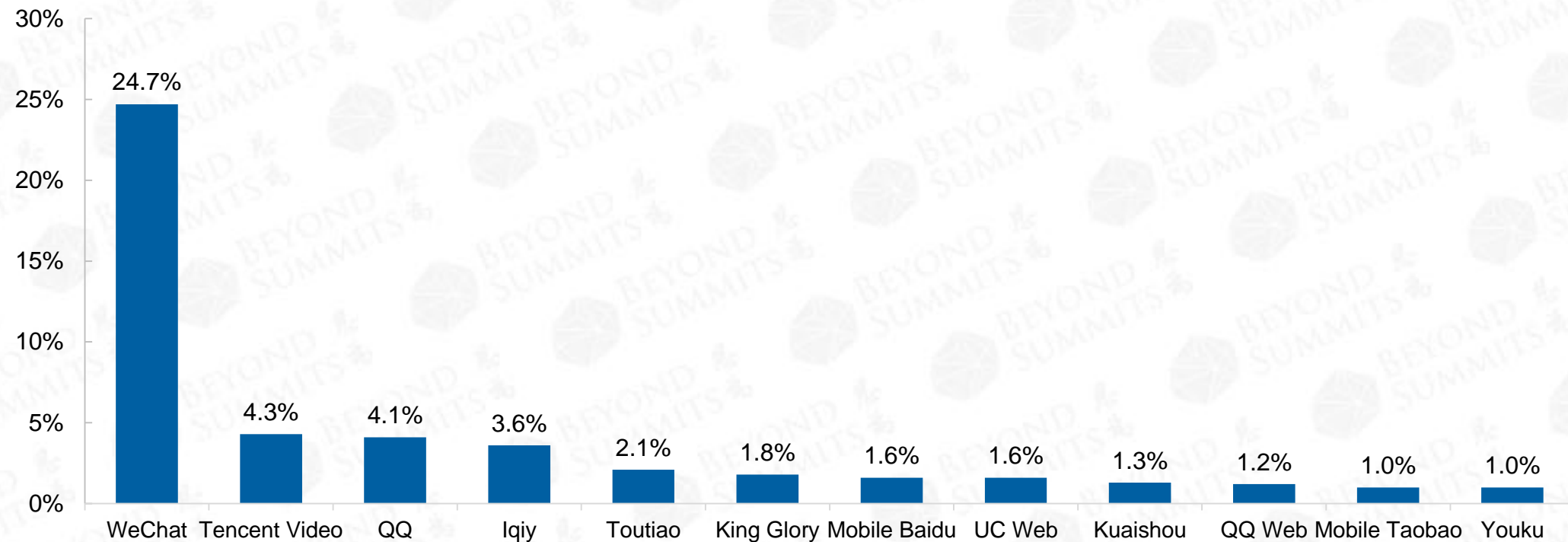
### 2017.12 China's Mobile Internet Users' Average Daily Spending Time in TOP 10 APPs



Source: JiGuang

Of the total time spent by mobile Internet users in using apps, WeChat accounted for a quarter, much longer than other apps. Followed by Tencent video and QQ, accounted for 4.3% and 4.1% respectively.

### 2017.6 Proportion of Mobile Internet Users' Time Spent in TOP 10 APPs



Source: Trustdata



Differences of men and women were also reflected in the choice of apps. The most popular application among male users was Momo, while female users were more fond of apps which can take photos or PS, such as Meitu and Faceu.

**2017.12 Male Users' APP Preference TOP 10**

APP Name	APP Preference Index
Momo	65.1
UC Web	64.5
Xunlei	64.2
Auto Home	64.1
JD.com	63.6
ICBC	63.5
JD Finance	63.4
CCB	63.2
QQ Pim	63.2
Didi Chuxing	63.1

**2017.12 Female Users' APP Preference TOP 10**

应用名称	APP Preference Index
Meitu	74.1
Faceu	74.0
B612 Snowcam	72.3
Hunan TV	71.8
Meiyan	70.8
Zuoyebang	70.8
QQ Tu	68.8
QQ Xxl	66.7
Meipai	66.6
Meiyou	65.3

Source: JiGuang

The apps preferred by mobile Internet users of all ages have more prominent features. Primary and middle school students under the age of 15 preferred Zuoyebang, and 36-45 years old mobile Internet users who have become parents preferred to use Zuoyebang and 17 Zuoye, while users aged from 16-25 years old preferred Arena of Valor.

#### 2017.12 Users' APP Preference TOP 5 (0-15 Years Old)

APP Name	APP Preference Index
Zuoyebang	92.2
QQ Music	88.0
QQ KG	86.0
UC Web	83.8
Kuaishou	83.4

#### 2017.12 Users' APP Preference TOP 5 (16-25 Years Old)

APP Name	APP Preference Index
Arena of Valor	84.5
QQ Music	81.6
Kuaishou	81.5
Sina Weibo	81.5
163 Music	80.1

#### 2017.12 Users' APP Preference TOP 5 (26-35 Years Old)

APP Name	APP Preference Index
Pay for it	62.4
CMB China	60.3
Didi Ower	59.6
Rong 360	58.8
Weshare	58.8

#### 2017.12 Users' APP Preference TOP 5 (36-45 Years Old)

APP Name	APP Preference Index
Zuoyebang	85.0
17 Zuoye	76.1
QQ Open	73.9
Baidu APP	73.3
Zhushou 360	72.6

Source: JiGuang

The mobile Internet users in the first-tier and new first-tier cities preferred sharing traveling apps, such as Didi, ofo, and Mobike. However, users in the third-tier cities preferred P2P apps.

**2017.12 Users' APP Preference in First-tier Cities TOP 5**

APP Name	APP Preference Index
JD.com	80.0
Dianping	78.6
Ofo	78.4
Mobike	78.3
Eleme	77.9

**2017.12 Users' APP Preference in New First-tier Cities TOP 5**

APP Name	APP Preference Index
Didi	75.4
Ofo	71.8
JD.com	71.2
Mobike	70.8
Eleme	70.5

**2017.12 Users' APP Preference in Second-tier Cities TOP 5**

APP Name	APP Preference Index
ZJ 10086	68.8
10086	65.9
QQ Mail	65.9
Eleme	65.7
CMB China	64.8

**2017.12 Users' APP Preference in Third-tier Cities TOP 5**

APP Name	APP Preference Index
Paipaidai	57.7
Rong 360	57.4
Weshare	56.9
Cash Loan	56.5
Cashbus	56.1

Source: JiGuang

In December 2017, ofo, Pinduoduo, and Mini1 were the Top 3 apps that have the highest year-on-year growth rate of market penetration, with the year-on-year growth rates all reaching more than 1000%.

### 2017.12 Growth Rate of Market Penetration of TOP 10 Domestic APPs

APP Name	YOY Growth Rate ( 2017.12 VS 2016.12 )	Market Penetration
Ofo	1811.7%	5.3%
Pinduoduo	1507.6%	19.0%
Mini1	1079.2%	3.1%
Mobike	482.5%	5.1%
Paipai	419.4%	1.5%
TapTap	325.9%	2.3%
Xiaohongshu	302.2%	1.7%
B612	279.0%	7.8%
Qutoutiao	277.4%	2.9%
Xigua110	243.3%	7.3%



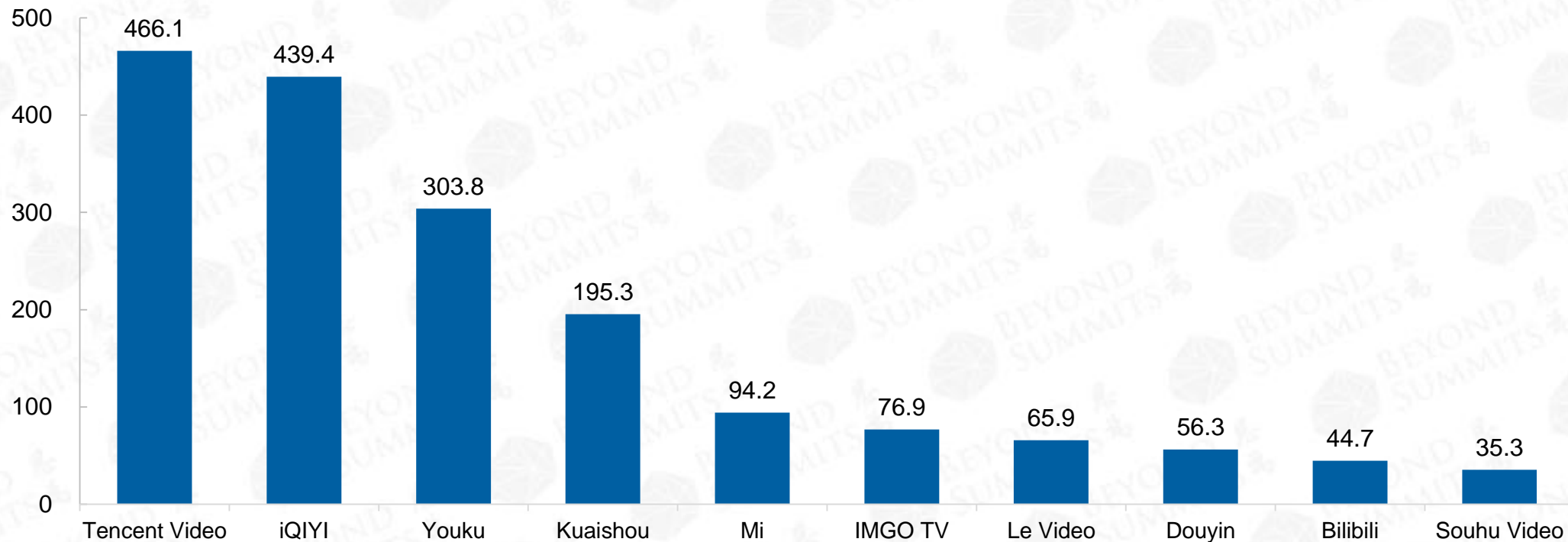
Average DAU (daily active user) of short video apps Douyin and Huoshan showed an excellent performance. Tencent's office business apps TIM and WeChat also ranked the Top 10.

### 2017.12 Domestic APP in Growth Rate of DAU

APP Name	YOY Growth Rate (2017.12 VS 2016.12)	DAU (Million)
Douyin	116271.2%	17.45
TIM	14270.0%	3.41
Huoshan	3434.7%	22.83
Mini1	1201.3%	3.67
Ofo	1086.4%	5.18
Weixin Work	660.9%	2.46
B612	512.7%	6.82
Pinduoduo	483.5%	16.21
Paipai	374.9%	3.12
Qutoutiao	373.2%	8.17

In 2017, Tencent Video, iQIYI, and Youku still ranked Top 3 among all video apps. Live streaming and short video apps grew rapidly, including Kuaishou and Douyin.

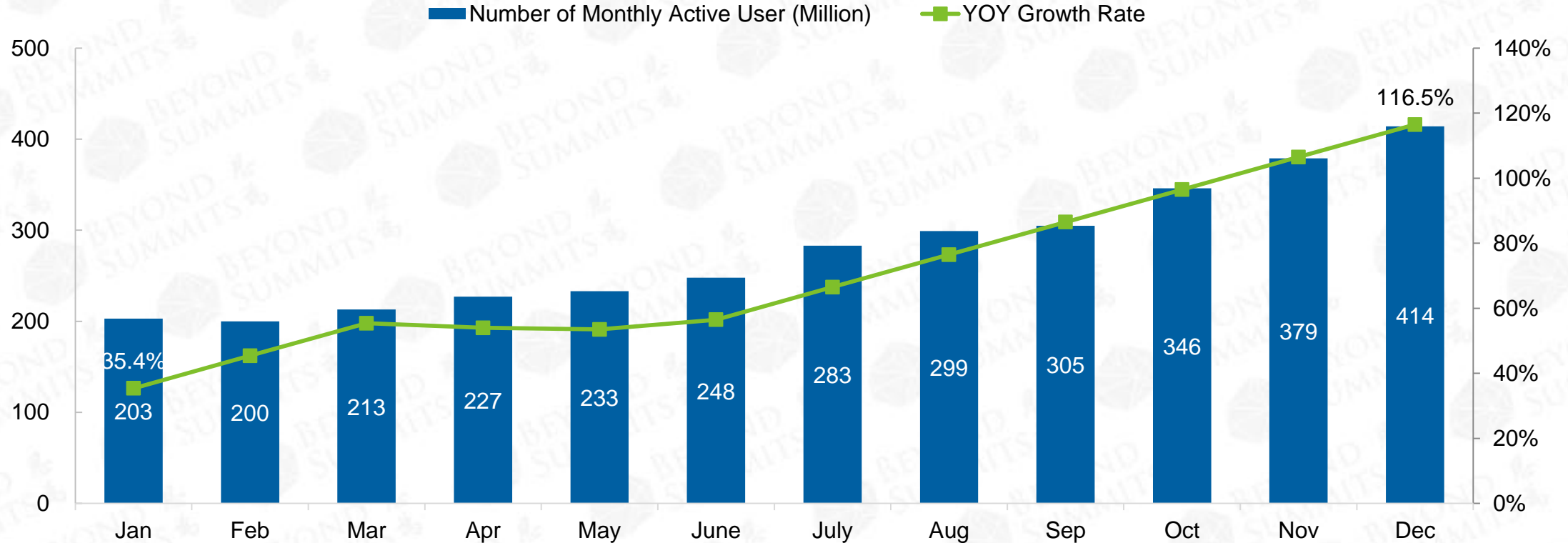
### 2017 Mobile Video APP's Active Users TOP 10 (Million)



Source: TalkingData

In 2017, the number of monthly active users in short video industry has exceeded 410 million, an increase of 116.5% over the same period of last year. The development of short video has become the biggest dividend at present.

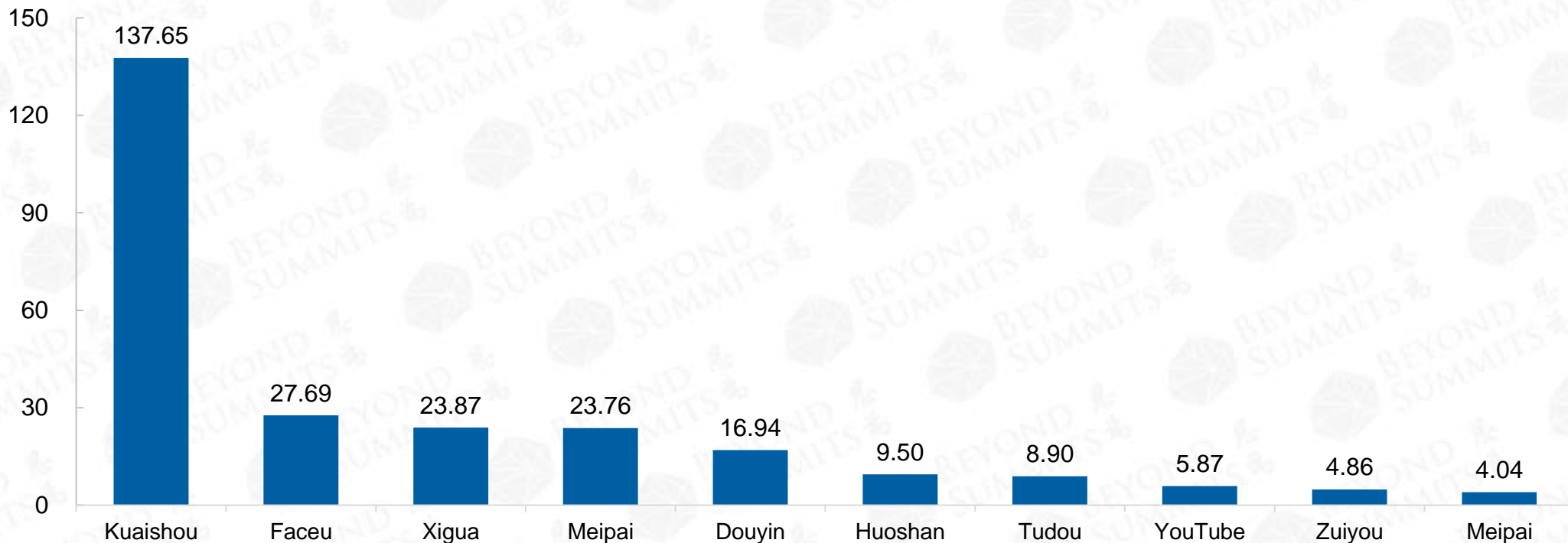
### 2017.1-12 Number of Monthly Active Users in Short Video Industry



Source: QuestMobile

In June 2017, Kuaishou became the leading app among all the mobile short video apps, with monthly active users (MAU) reaching 137.65 million. However, the growth rate of the monthly active users of Douyin was the highest, reaching 57.7% compared with the last month.

### 2017.6 Mobile Short Video APP's Monthly Active Users TOP 10 (Million)

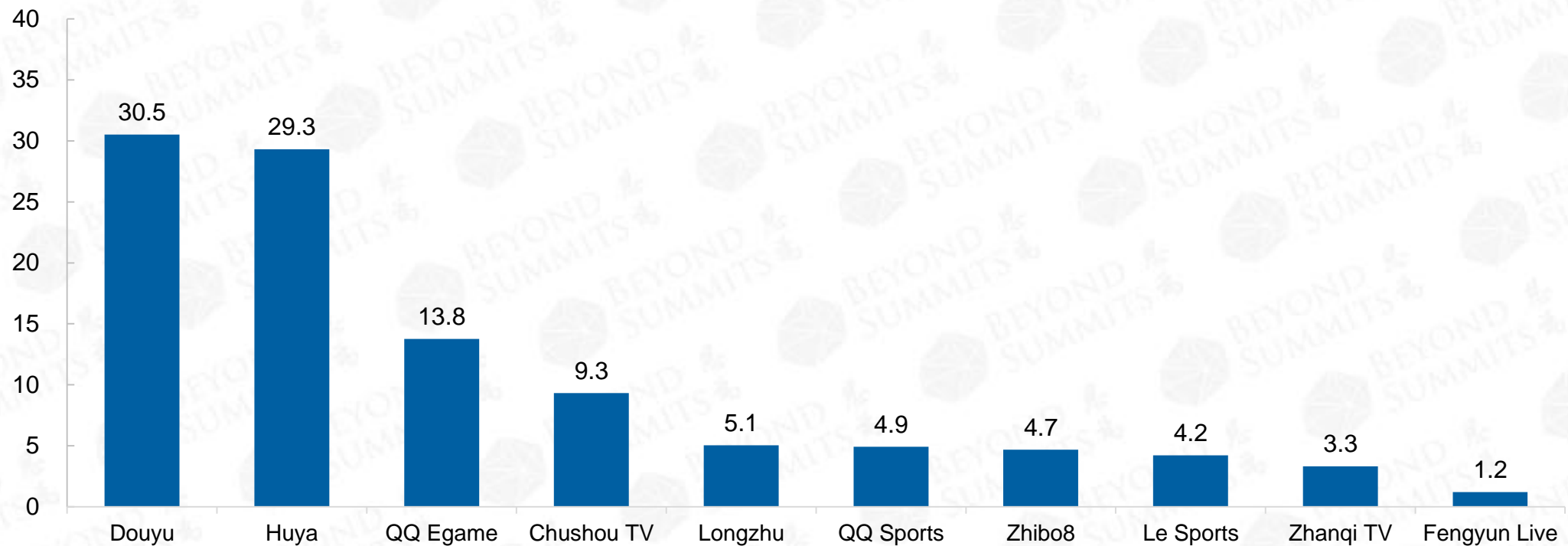


Source: Trustdata



In 2017, among all live streaming video apps, Douyu, Huya, and QQ Egame ranked the Top 3, and electronic sports has become a new live hotspot.

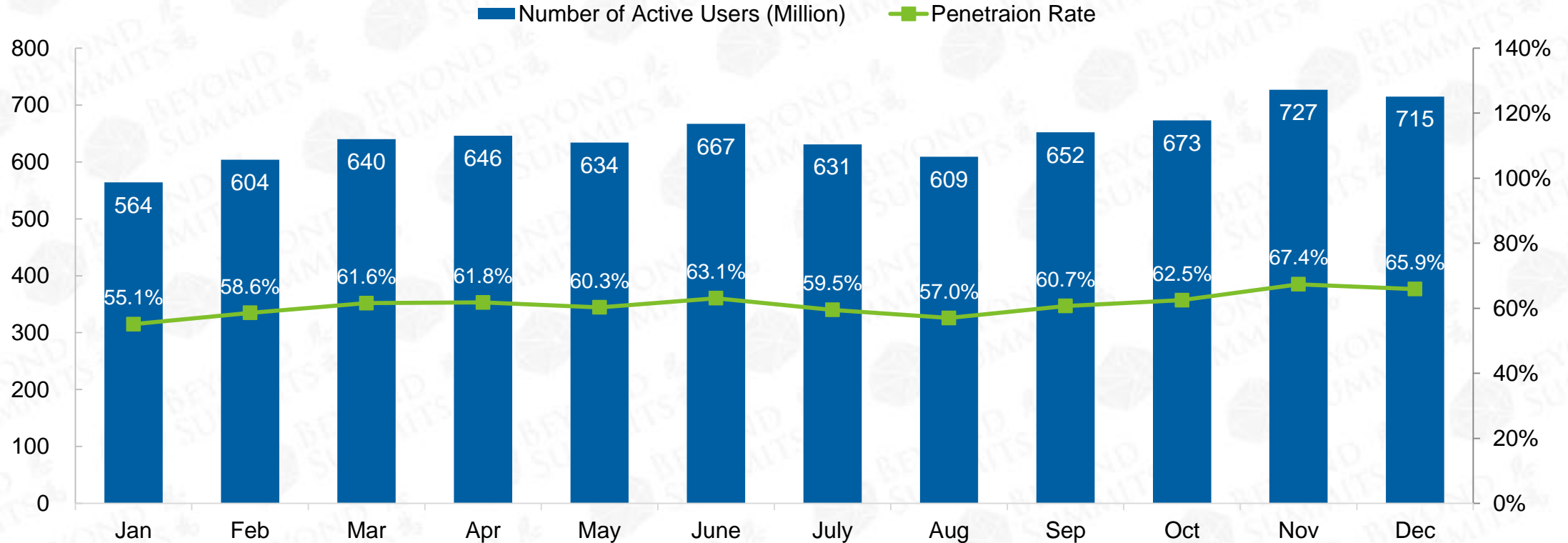
### 2017 Live Streaming Video APP's Active Users TOP 10 (Million)



Source: TalkingData

In 2017, the popularity of mobile payment and the integration of new retail online and offline promoted the further growth of the scale of mobile e-commerce users. Especially on the “Double Eleven Day” in 2017, the user[s] scale reached 727 million.

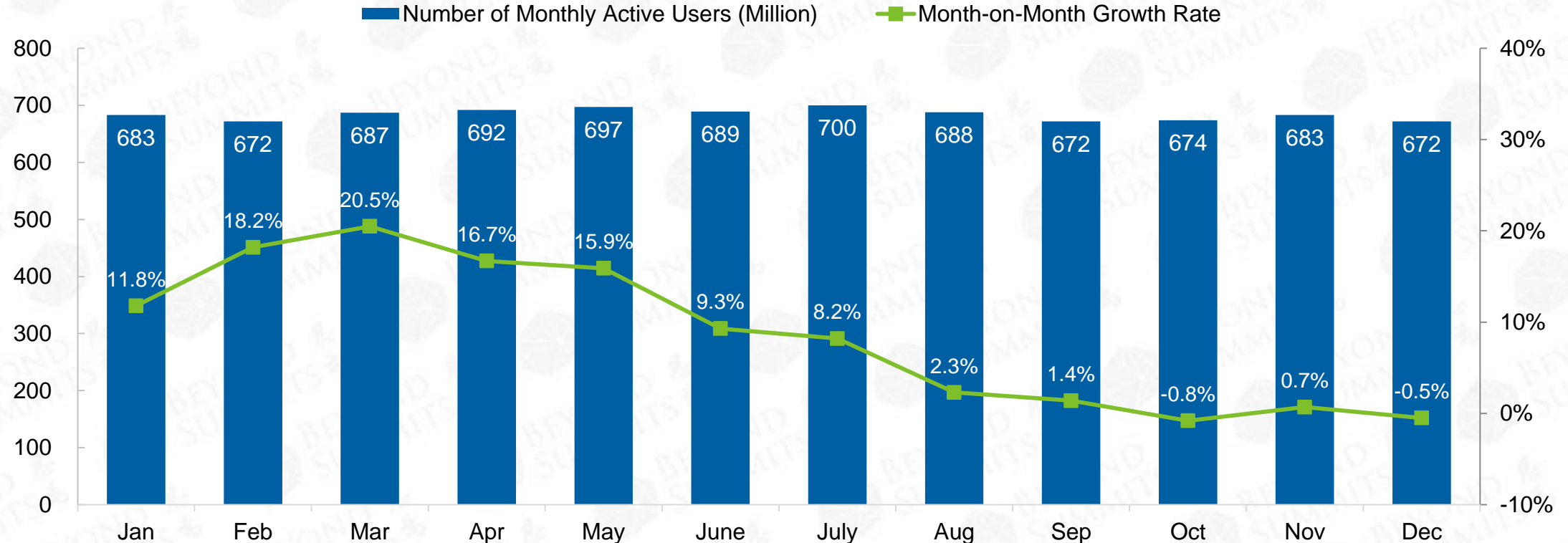
### 2017.1-12 User's Scale and Penetration of Mobile E-commerce Users



Source: QuestMobile

In December 2017, the number of mobile music users reached 672 million, a decrease of 11.09 million compared to the beginning of the year, showing that the growth of the industry was weak. The impact of copyright wars and short videos have shifted the users' attention.

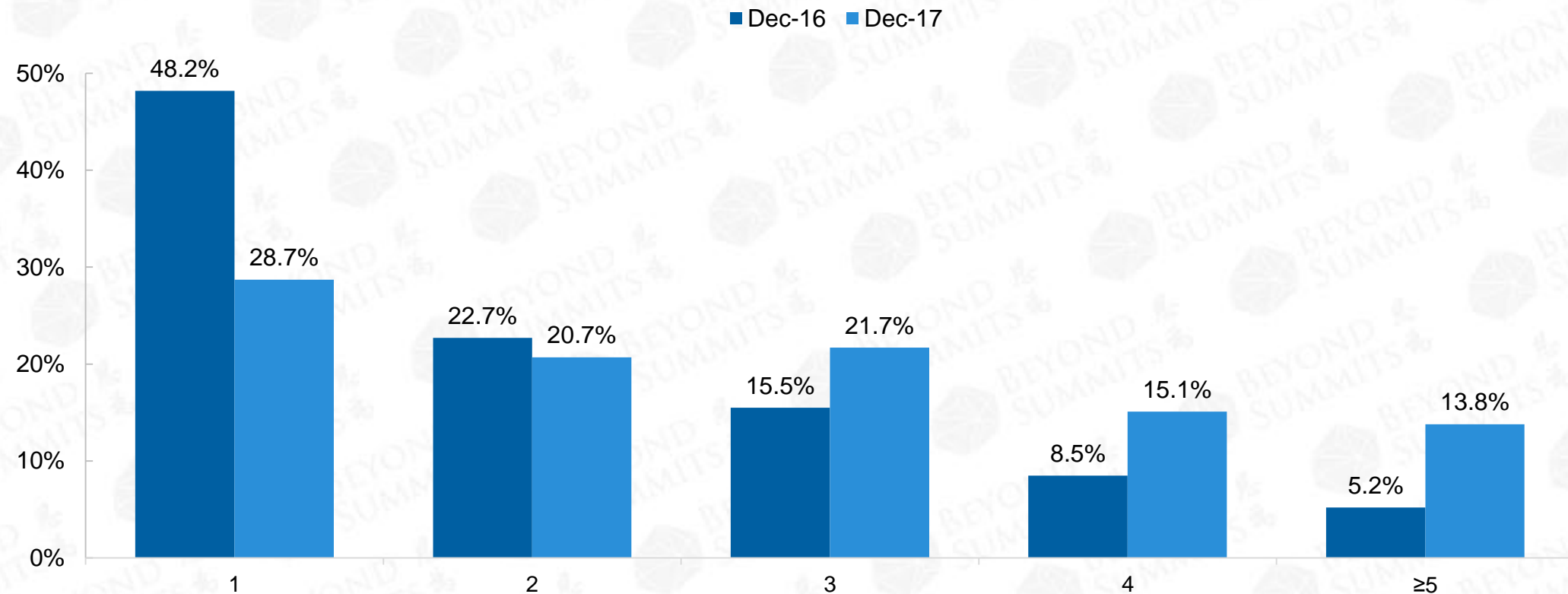
### 2017.1-12 Market Scale of Mobile Music



Source: QuestMobile

Users are never loyal to one platform, and the same is true in the e-commerce industry. In December 2017, the proportion of users who installed more than three shopping apps increased significantly compared with the same period of last year.

**2017.12 Average Number of APPs Installed by Mobile Shopping Users**

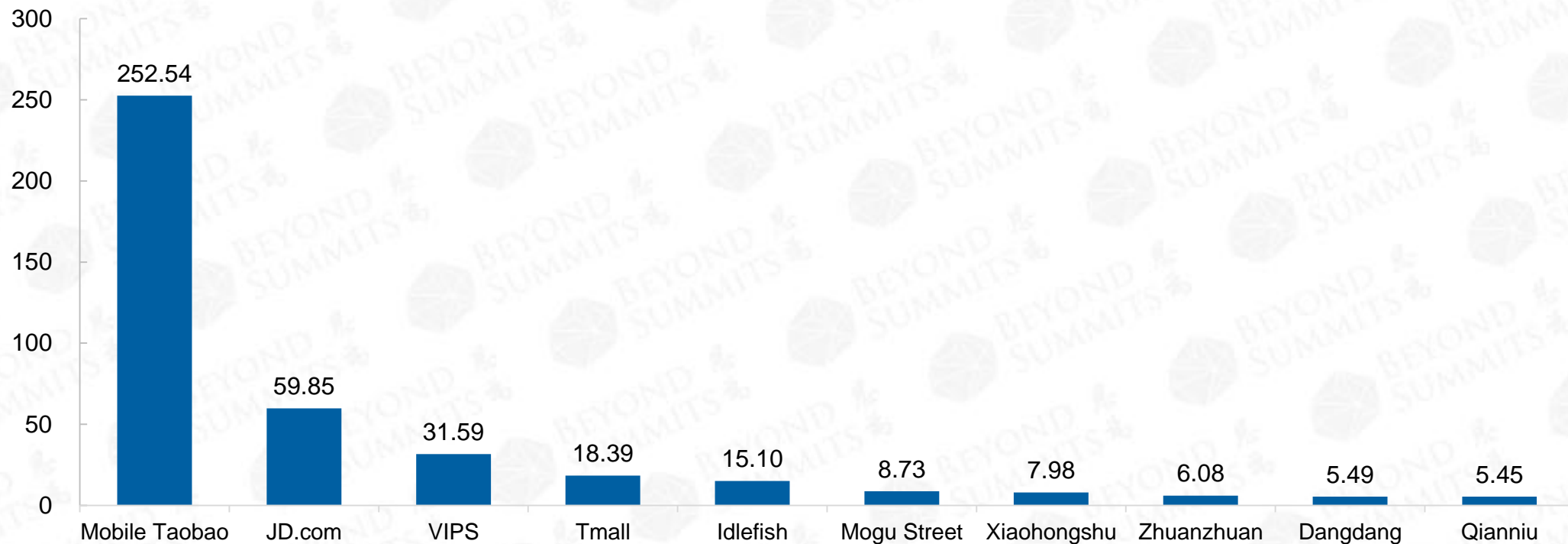


Source: QuestMobile



In June 2017, Taobao, JD.com, and VIPS remained the Top 3 of all mobile shopping apps in monthly active users (MAU). Moreover, MAU of Zhuanzhuan, Xiaohongshu and Idlefish (Xianyu) grew rapidly.

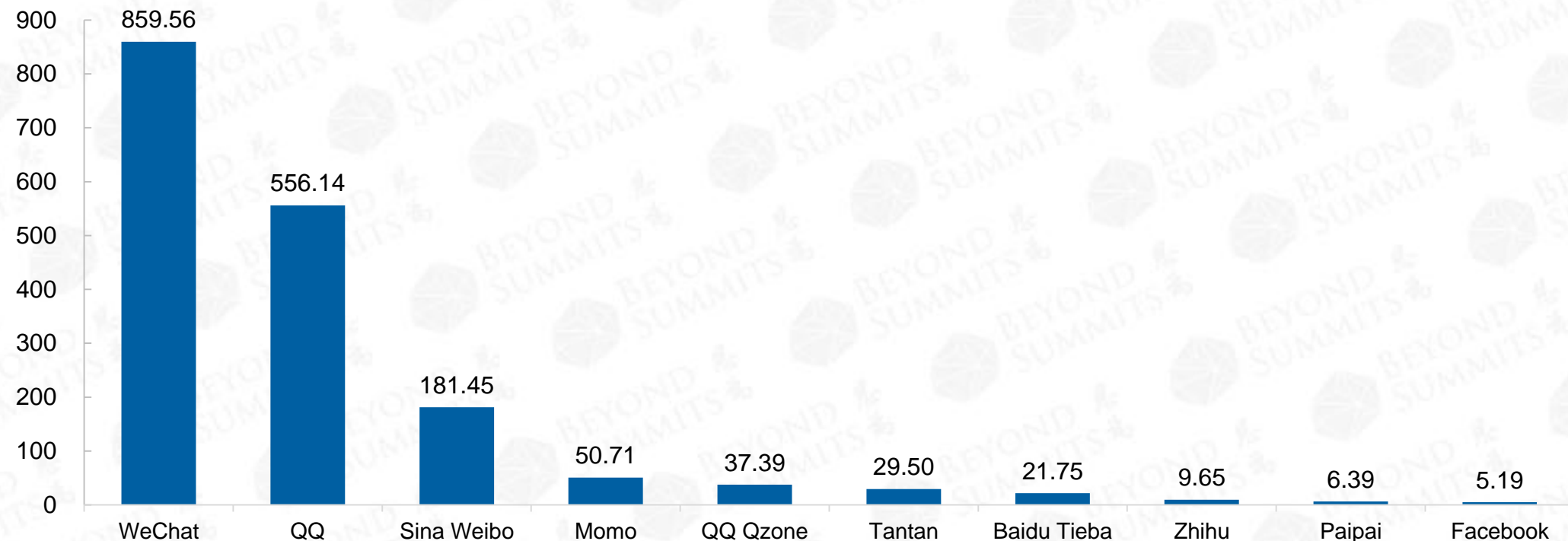
### 2017.6 Mobile Shopping APP's Monthly Active Users TOP 10 (Million)



Source: Trustdata

In June 2017, among all mobile social apps, WeChat had the highest monthly active users (MAU) with the number being 860 million, followed by QQ and Sina Weibo. It was noted that the knowledge-sharing platform Zhihu also ranked in the Top 10, which was 8.5% higher than that of the last month.

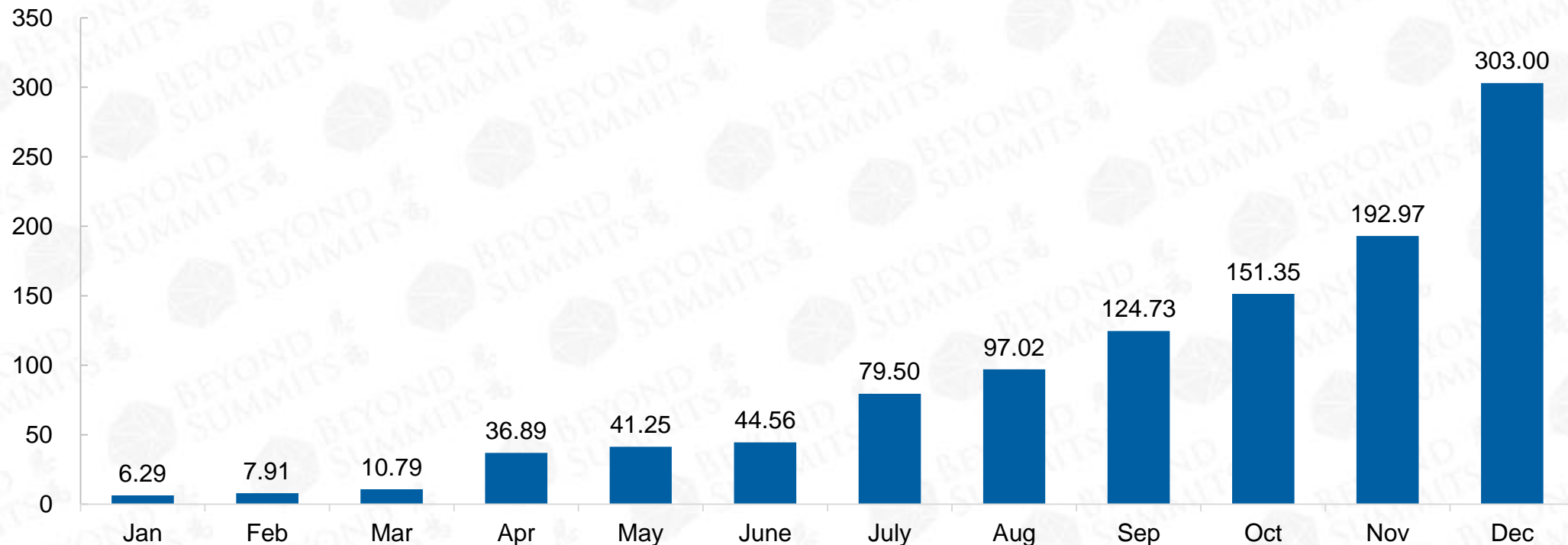
### 2017.6 Mobile Social APP's Monthly Active Users TOP 10 (Million)



Source: Trustdata

The continuous opening of WeChat Mini Programs has promoted the users to form the habit of using these Mini Programs. As of December 2017, the monthly active users (MAU) reached 303 million.

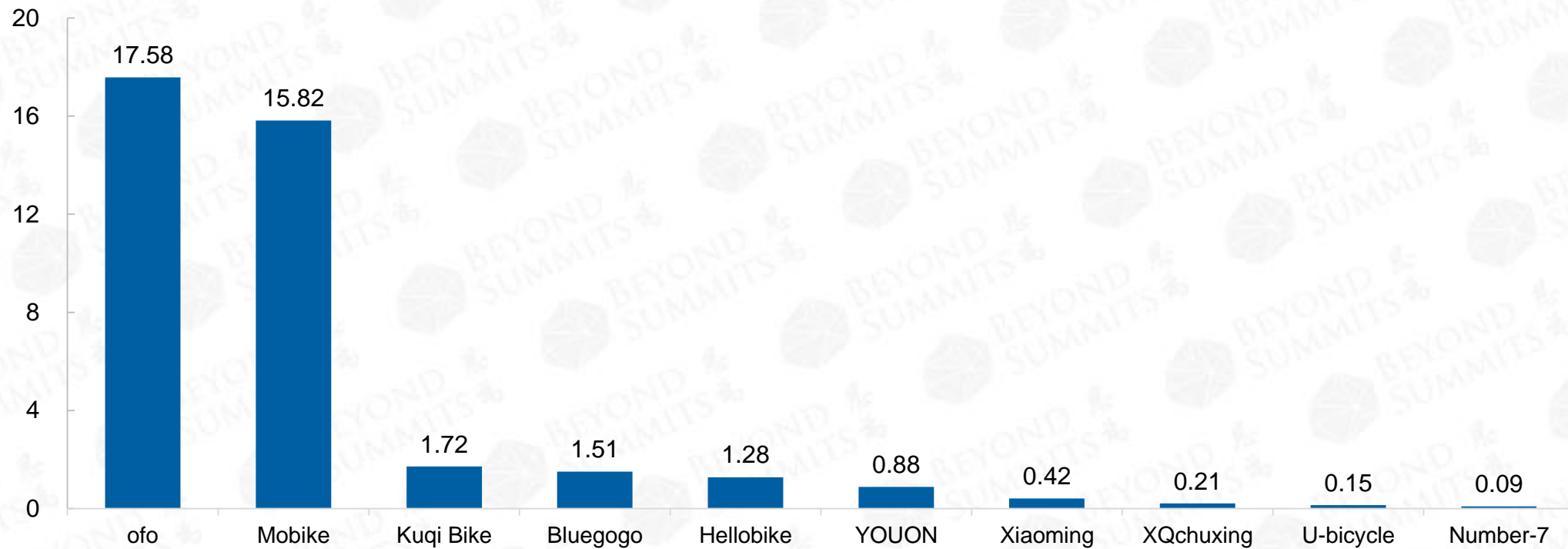
**2017.1-12 Number of WeChat Mini Program's Monthly Active Users (Million)**



Source: QuestMobile

In June 2017, the number of monthly active users of ofo and Mobike were much higher than other bike-sharing apps, reaching 17.58 million and 15.82 million respectively.

### 2017.6 Bike-Sharing APP's Monthly Active Users TOP 10 (Million)

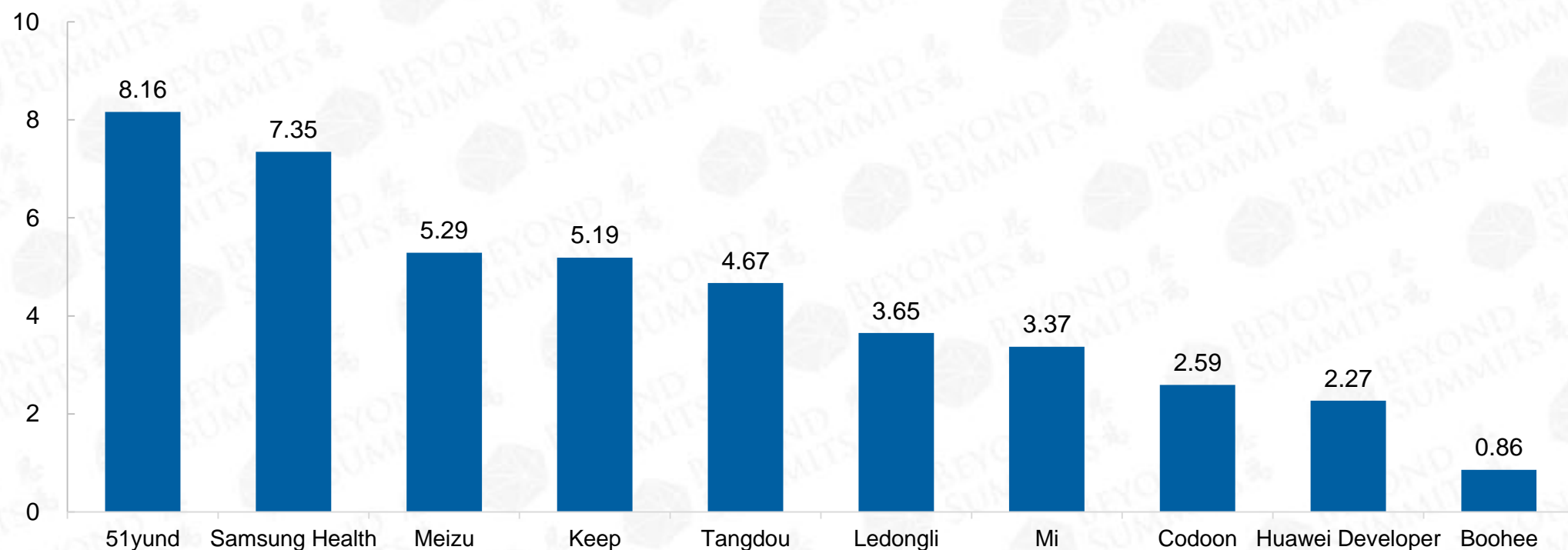


Source: Trustdata



In June 2017, the number of 51yund's monthly active users was the largest among all sports and healthy apps, reaching 8.16 million. Moreover, the growth rate of Keep and Tangdou's user scale increased most rapidly.

### 2017.6 Sports and Healthy APP's Monthly Active Users TOP 10 (Million)



Source: Trustdata

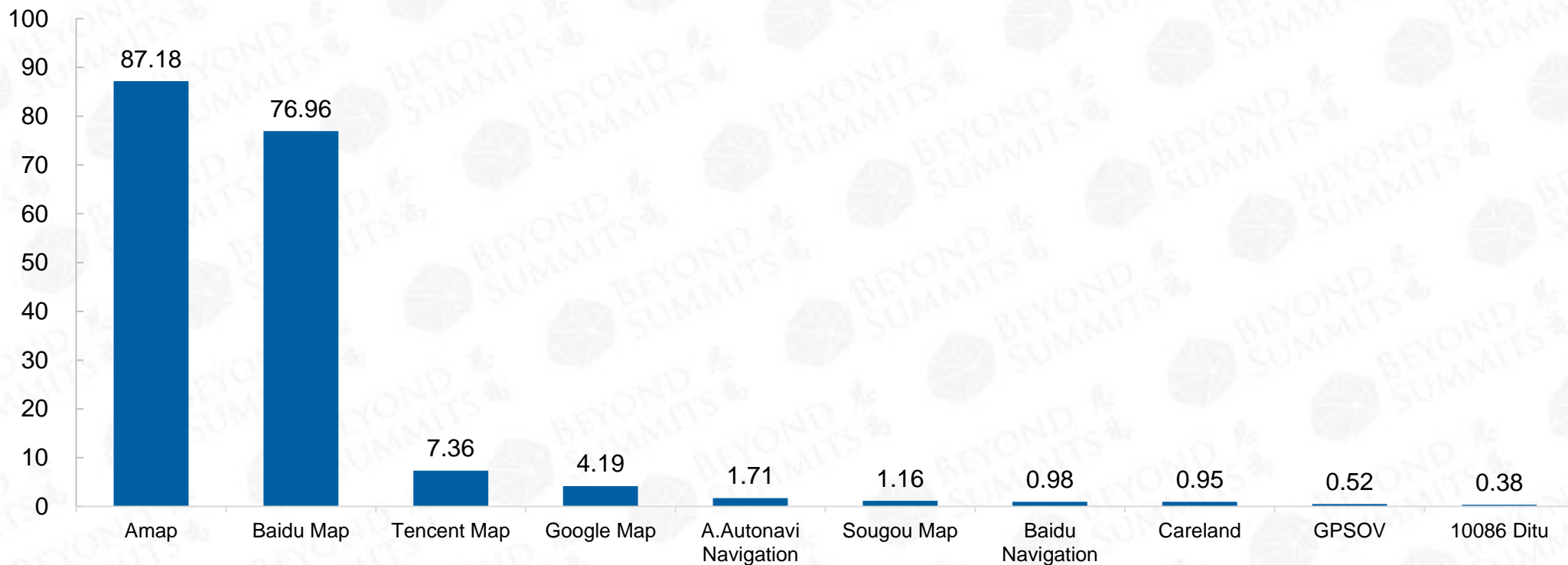
In the field of mobile tourism, the number of monthly active users of 12306 reached 13.32 million in the second quarter of 2017, ranking first, a decrease of 19% from the previous quarter. In addition, Ctrip, Qunar and other travel apps also have large quantity of users.

APP Name	2017Q2 Average MAU (Million)	2017Q1 Average MAU (Million)	Growth Rate (2017 Q2 VS 2017Q1)
12306	13.32	16.54	-19%
Ctrip	13.19	11.80	19%
Qunar	11.14	11.07	-6%
Suanya	4.04	5.53	-27%
Fliggy	2.82	3.27	-14%
Gaotie 133	1.77	1.95	9%
LY.com	1.57	1.72	-9%
Tieyou	1.19	1.59	-25%
Tuniu	1.07	1.22	-12%
Mafengwo	0.88	0.99	32%
Chebada	0.71	0.80	19%
Variflight	0.69	0.76	-13%
eLong	0.65	0.67	-35%
LLTSKB	0.65	0.59	-15%
China Lodging Group	0.54	0.48	11%

Source: Trustdata

In June 2017, the user scale of Amap and Baidu Map ranked the first and second among all map navigation apps, reaching 87.18 million and 76.96 million respectively.

### 2017.6 Map Navigation APP's Monthly Active Users TOP 10 (Million)



Source: Trustdata

Honor of Kings tops the mobile games market, with the average number of monthly active users in the second quarter of 2017 reaching 103 million, an increase of 15.3% from the previous quarter.

Mobile Game Name	2017Q2 Average MAU (Million)	2017Q1 Average MAU (Million)	Growth Rate (2017 Q2 VS 2017Q1)
Honor of Kings	103.04	89.38	15.3%
QQ XXL	59.19	68.79	-14.0%
HLDDZ	28.40	32.52	-12.7%
JJ	16.59	21.02	-21.0%
Snake Fight	15.53	30.31	-48.8%
Battle of Balls	14.16	20.35	-30.4%
LOL	14.09	16.13	-12.6%
Bingo	11.89	11.68	1.7%
QQ Peng	10.33	10.73	-3.7%
QQ Majiang	10.26	10.80	-5.0%
CrossFire	9.31	11.57	-19.5%
tencent.gamehelper.smoba	7.73	3.35	130.6%
Langren8	7.30	4.91	48.8%
Minecraft	6.94	9.09	-23.7%
Clash of Clans	5.93	6.98	-14.9%

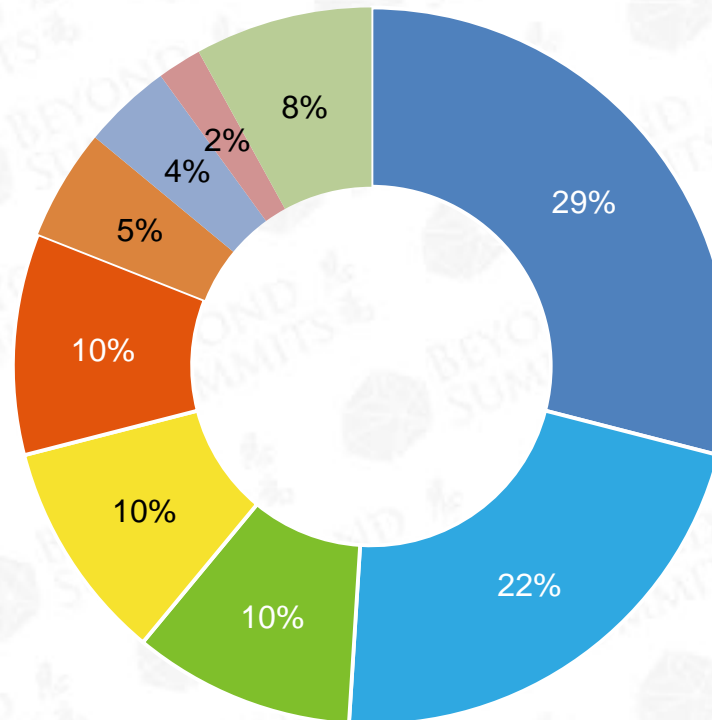
Source: Trustdata



In 2016, among all mobile Internet games, role-playing games accounted for the largest, with the proportion being 29%, followed by card games, which accounted for 22%.

### Distribution of China's Mobile Games in 2016

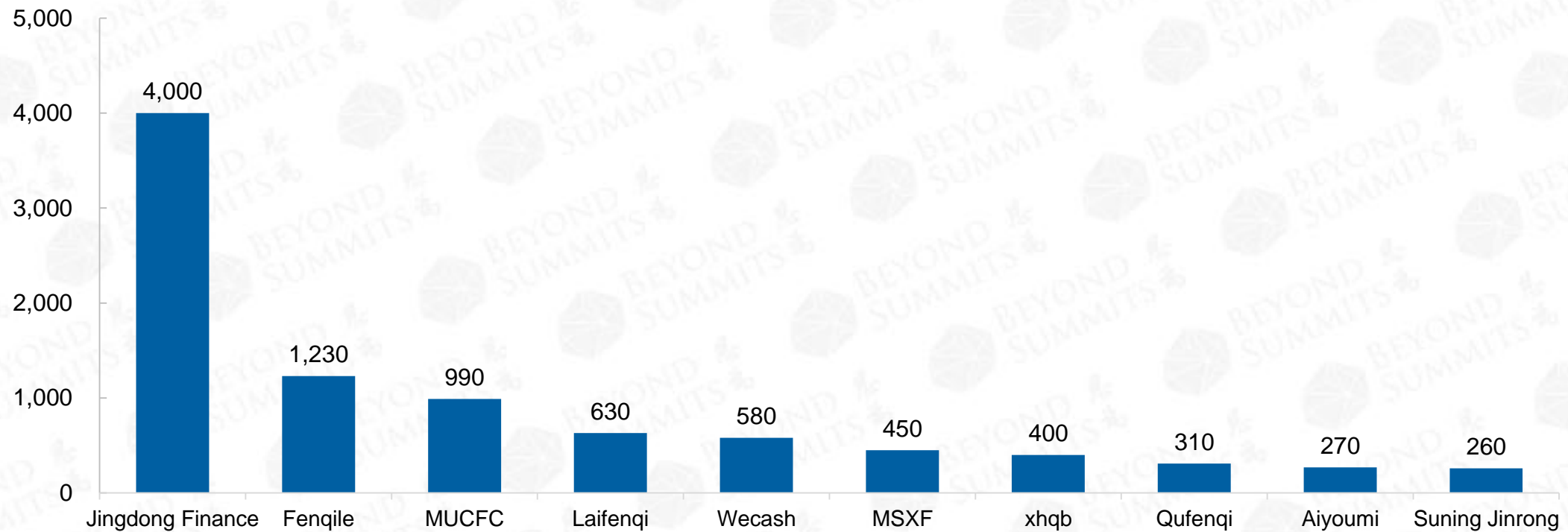
■ Role-playing ■ Card ■ Chess ■ Strategy ■ Action ■ Leisure and Wisdom ■ Shooting ■ Simulation ■ Others



Source: iResearch

In June 2017, Jingdong Finance ranked the first among all consumer finance apps, with the number of monthly active users reaching 4 million. The growth rate of MUCFC's monthly active users was the highest at 1,454.6%.

### 2017.6 Consumer Finance APP's Monthly Active Users TOP 10 (Thousand)



Source: Trustdata



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