

Social Media



Summary :

- In recent years, China's media landscape has changed rapidly, and digital media's revenue and market share have further expanded. Among them, social media is still the most active and most promising one.
- With the rapid growth of social media users in China, the penetration of social media has also increased significantly, especially for the mobile clients.
- While enjoying the convenience, social media also brings profound problems to users, especially in reducing the reading time of paper books and the impact on vision and sleep.
- As of December 2017, the usage of WeChat's friends and QQ Qzone was the highest among all social media applications. In 2017, Sina Weibo's overall coverage rate among netizens increased significantly. Meanwhile, Toutiao users also grew rapidly, especially in terms of coverage and daily activity.

From 2015 to 2017, the average age of social media users has increased. On the whole, the older of the age, the greater the increase in the number of users.

Average Age of Social Media Users

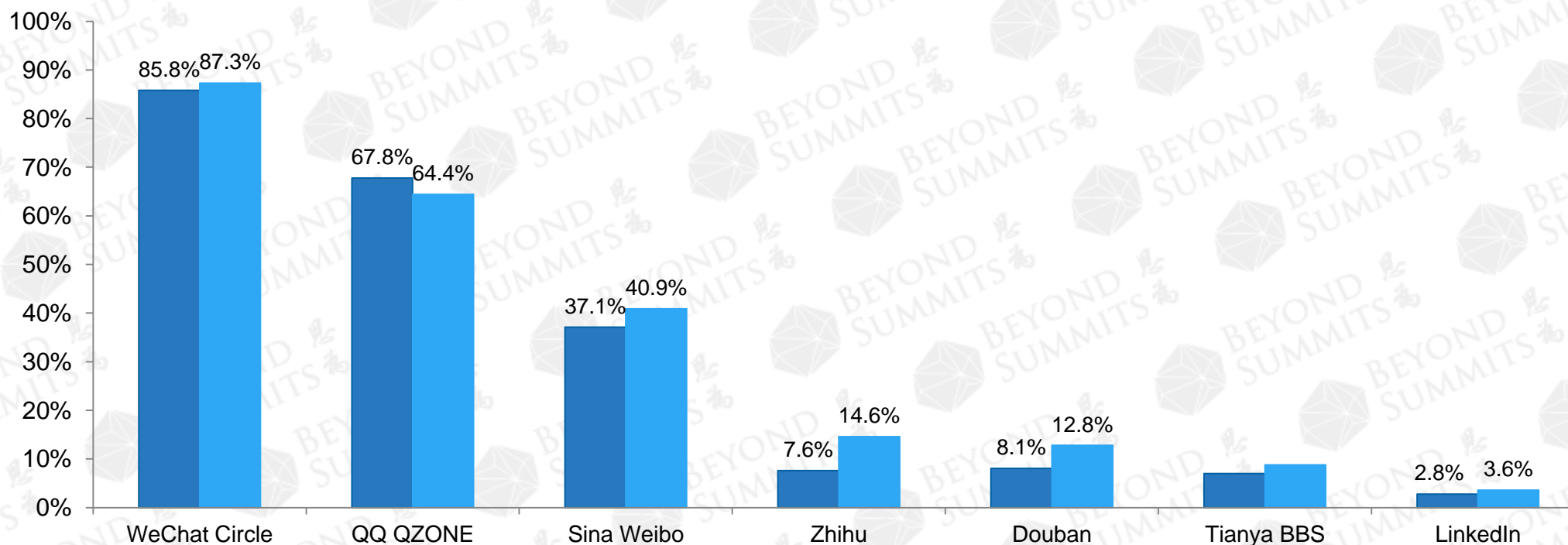
		2016 (%)	2017 (%)	Growth Rate	Growth Rate of Social Media Users
2017 33.1 years old	15-19 Y/O.	66.9	69.4	2.5	3.7%
	20-29 Y/O.	75.8	77.3	1.5	1.9%
	30-39 Y/O.	57.7	61.4	3.7	6.3%
2016 32.4 years old	40-49 Y/O.	56.9	63.8	6.9	12.1%
	50-59 Y/O.	26.7	34.2	7.5	28.3%
	60+ Y/O.	9.7	13.4	3.7	38.2%
2015 31.2 years old					

Source: Kantar, Report on China's Social Media Influence, 2017

As of December 2017, in all social applications, the usage rate of the WeChat and QQ Qzone were the highest, accounting for 87.3% and 64.4% respectively.

Usage of Social Media APP

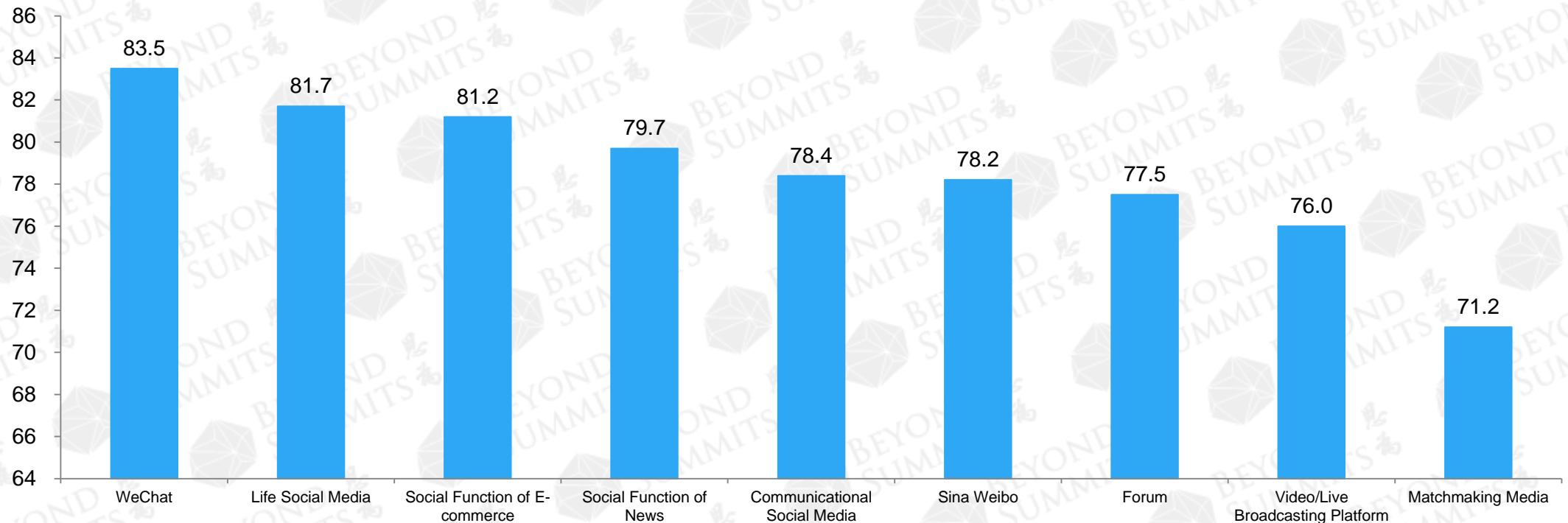
■ 2016 ■ 2017



Source: CNNIC

In terms of different types of social media's positive impact on life, WeChat got the best evaluation, while matchmaking media and video/live broadcasting platform had much lower rating.

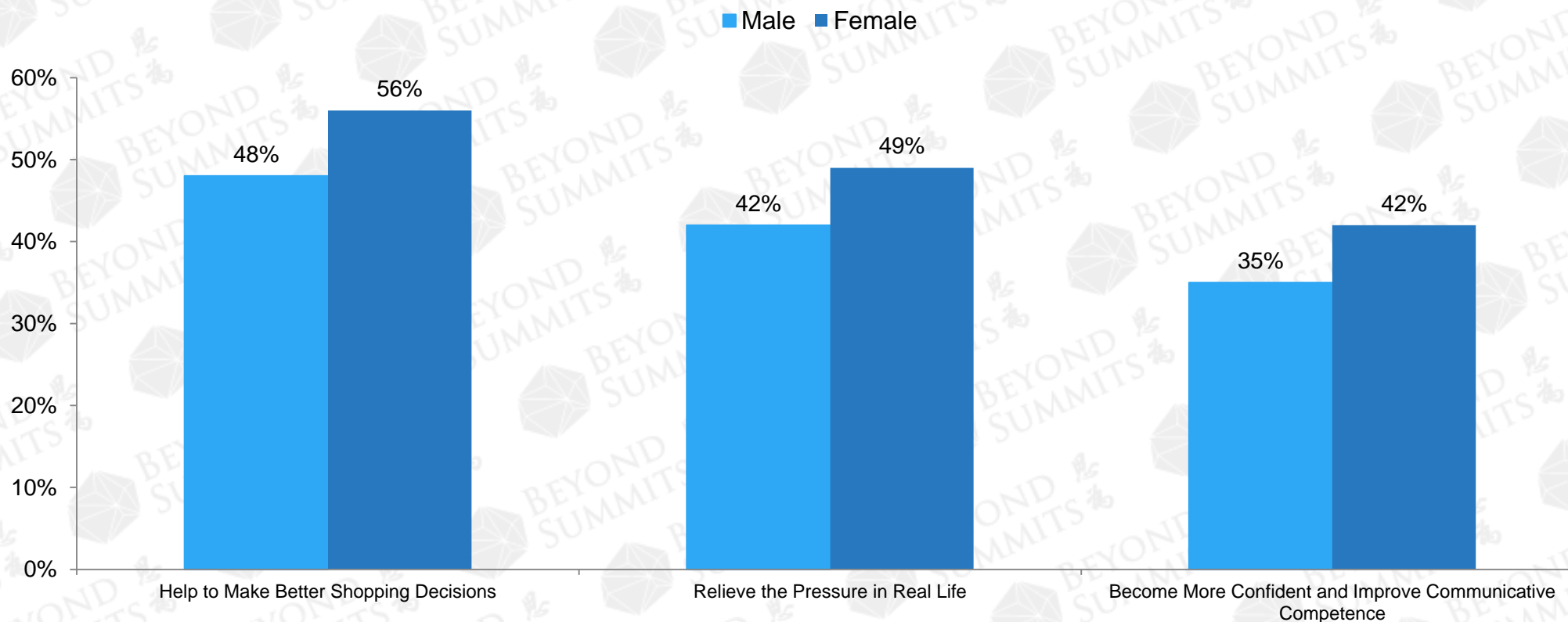
Users' Rating for Social Media's Positive Impact



Source: Kantar, Report on China's Social Media Influence, 2017

Social media plays a stronger role for women in relieving stress, enhancing social self-confidence, and helping to make shopping decisions.

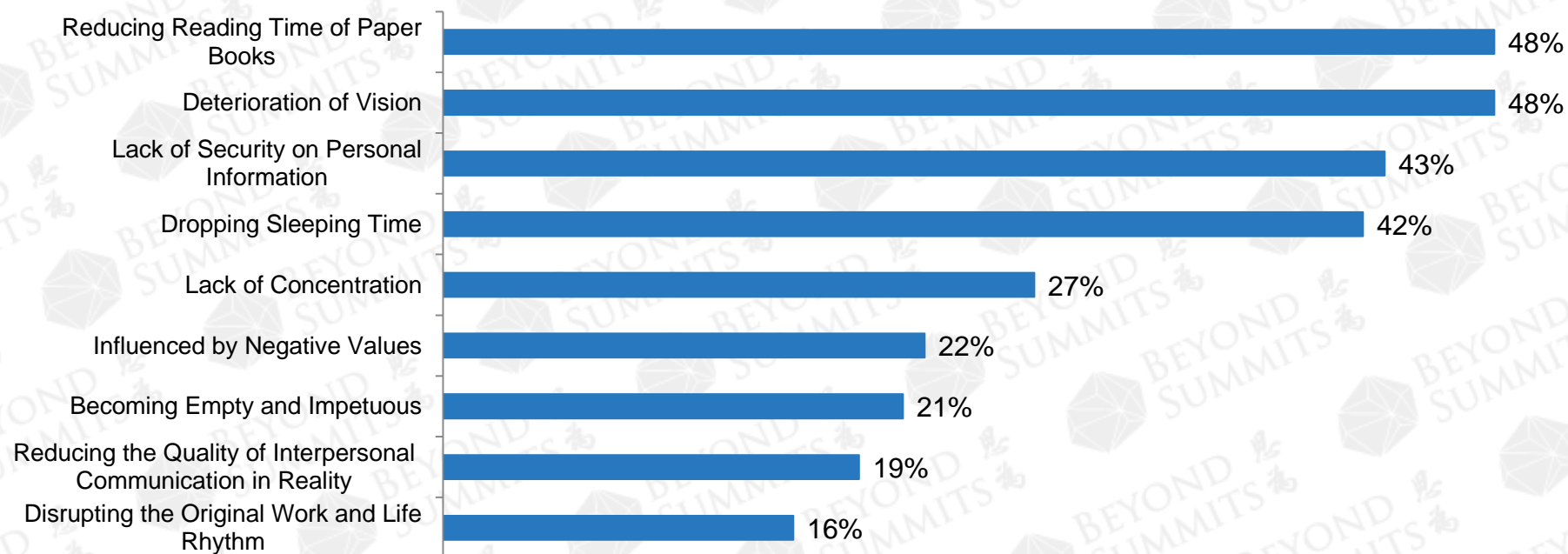
Positive Impact of Social Media on Users with Different Gender



Source: Kantar, Report on China's Social Media Influence, 2017

While enjoying the convenience, social media also brings profound problems to users, especially in reducing the reading time of paper books and the impact on vision and sleep.

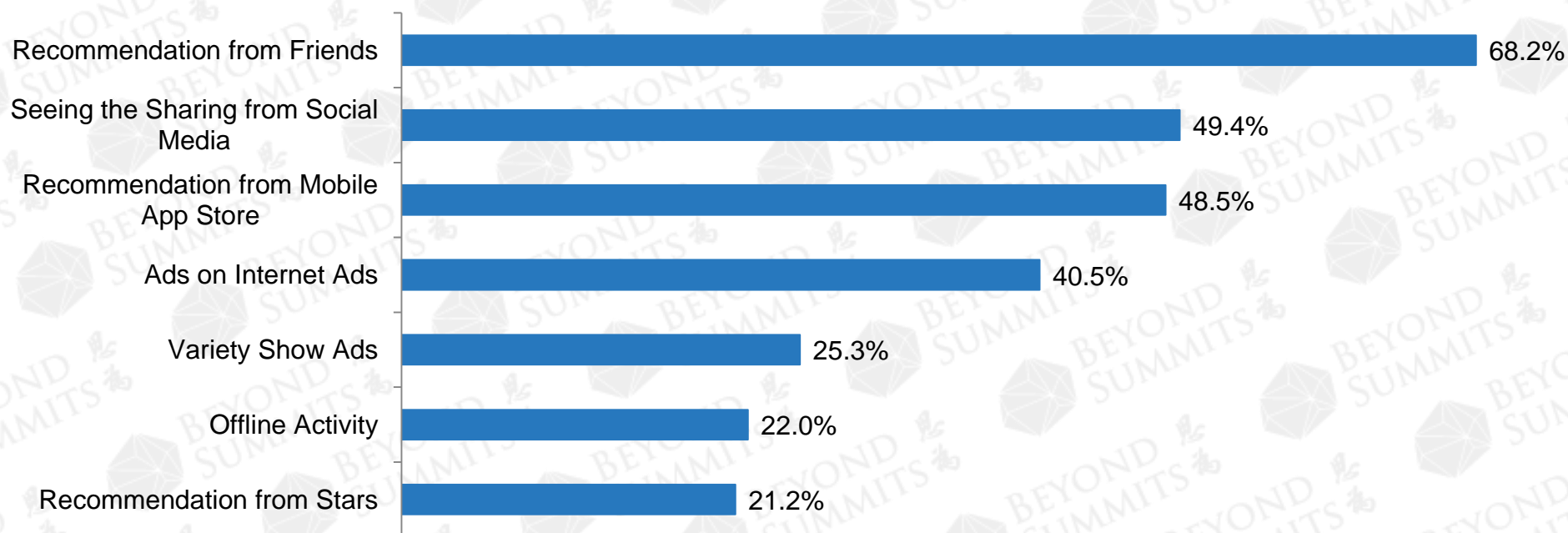
Negative Impact of Social Media



Source: Kantar, Report on China's Social Media Influence, 2017

Recommendation from friends was the primary way for mobile social users to learn and use mobile social networks, reflecting the importance of social elements in mobile social networking.

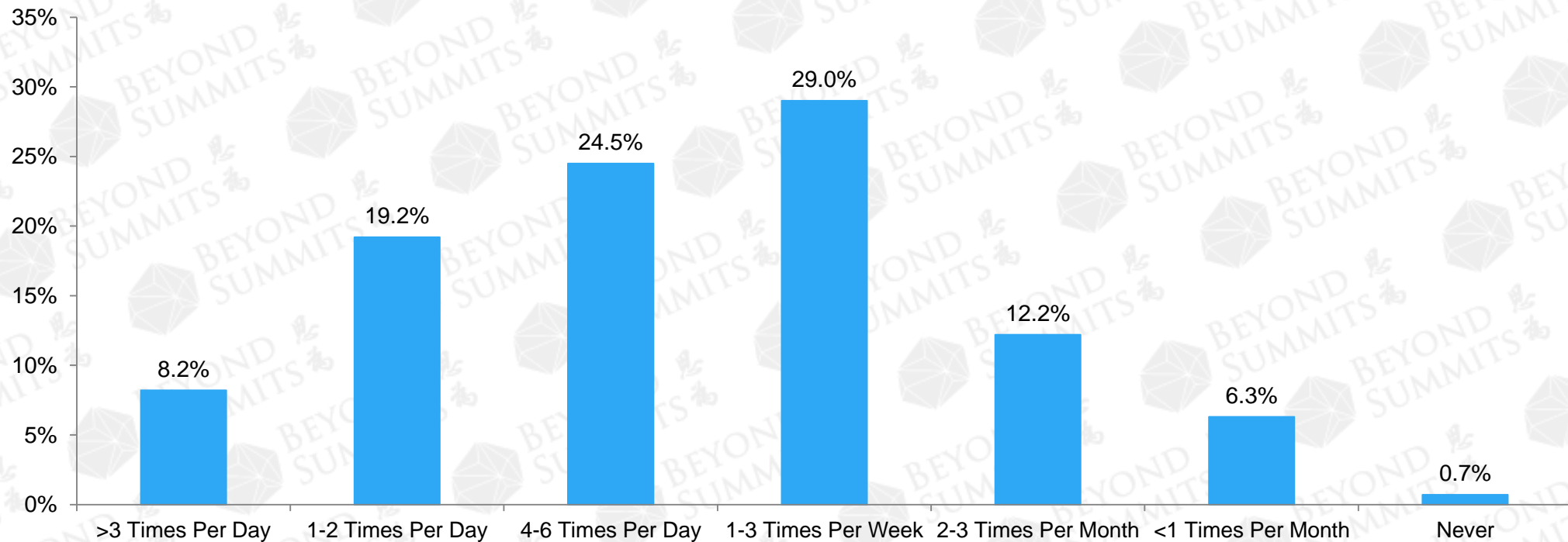
Channels for Mobile Social Users to Learn Mobile Social Networking



Source: iResearch Insight Report on China's Mobile Social User

According to the data, over 80% of mobile social users choose to post personal moments at least once a week.

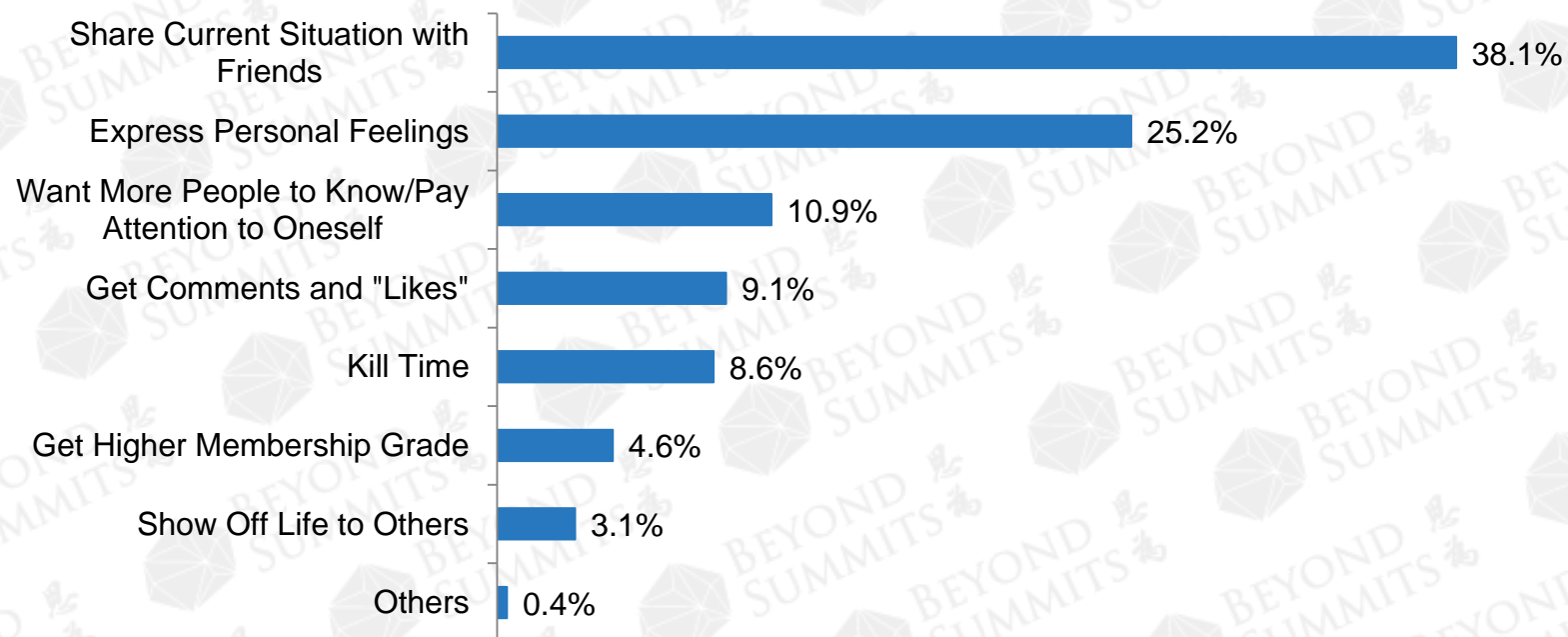
Frequency that China's Mobile Social Users Posted Personal Updates



Source: iResearch Insight Report on China's Mobile Social User

The main reason for mobile social users to post their personal moments is to share their current situation with their friends, which accounts for a proportion of 38.1%, indicating that users were very much concerned with the interaction between friends and social media.

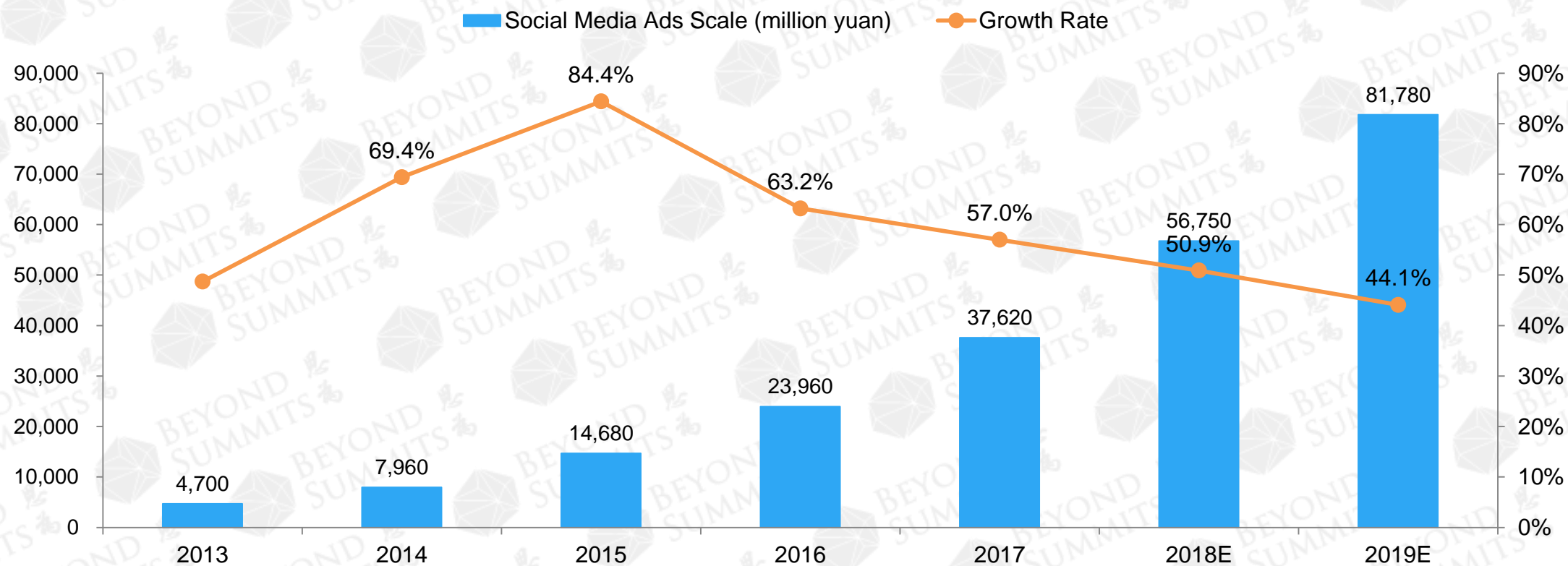
Main Reason to Post Personal Moments for Mobile Social Users



Source: iResearch Insight Report on China's Mobile Social User

China's and global social network marketing all show rapid growth. It is expected that by 2019, the scale of China's social media advertising will rise to 81.78 billion yuan.

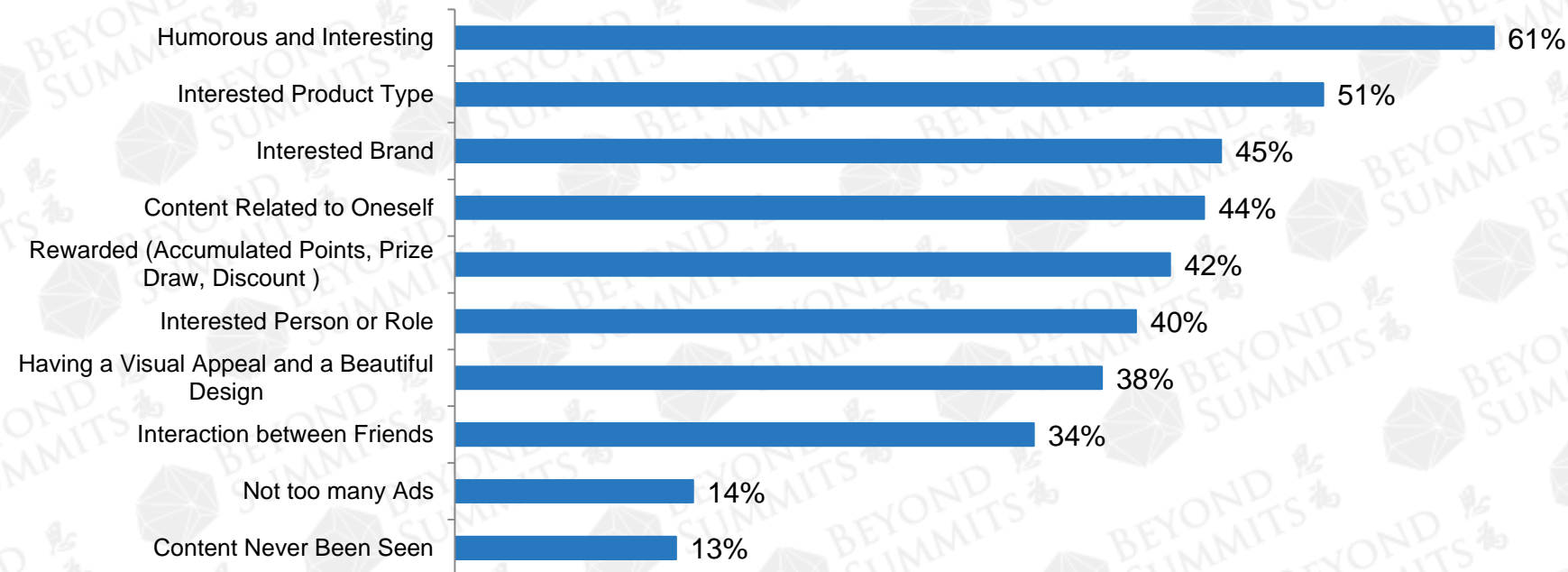
2013-2019 China's Social Media Ads Scale and Prediction



Source: iResearch Insight Report on China's Mobile Social User

Most social media users watch the ads selectively. The primary factor affecting the choice is whether the ads is humorous and interesting or not, which indicates that the creativity of ads is one of the most important factors in the communication of social media ads.

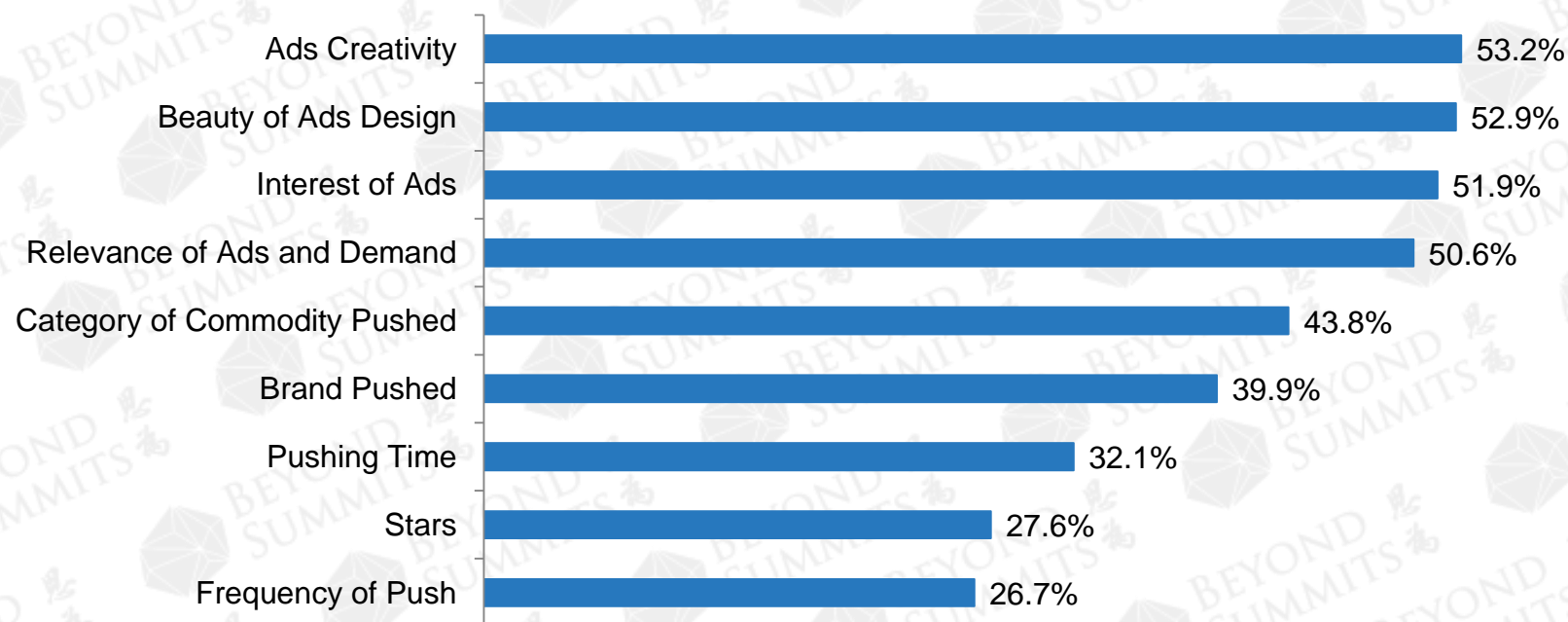
Types of Ads that Users were Interested in



Source: Kantar, Report on China's Social Media Influence, 2017

Among all the factors influencing mobile social users' focusing on feed ads, ads creativity, beauty of ads design, and interest of ads were more concerned by the users, and their satisfaction was also relatively high.

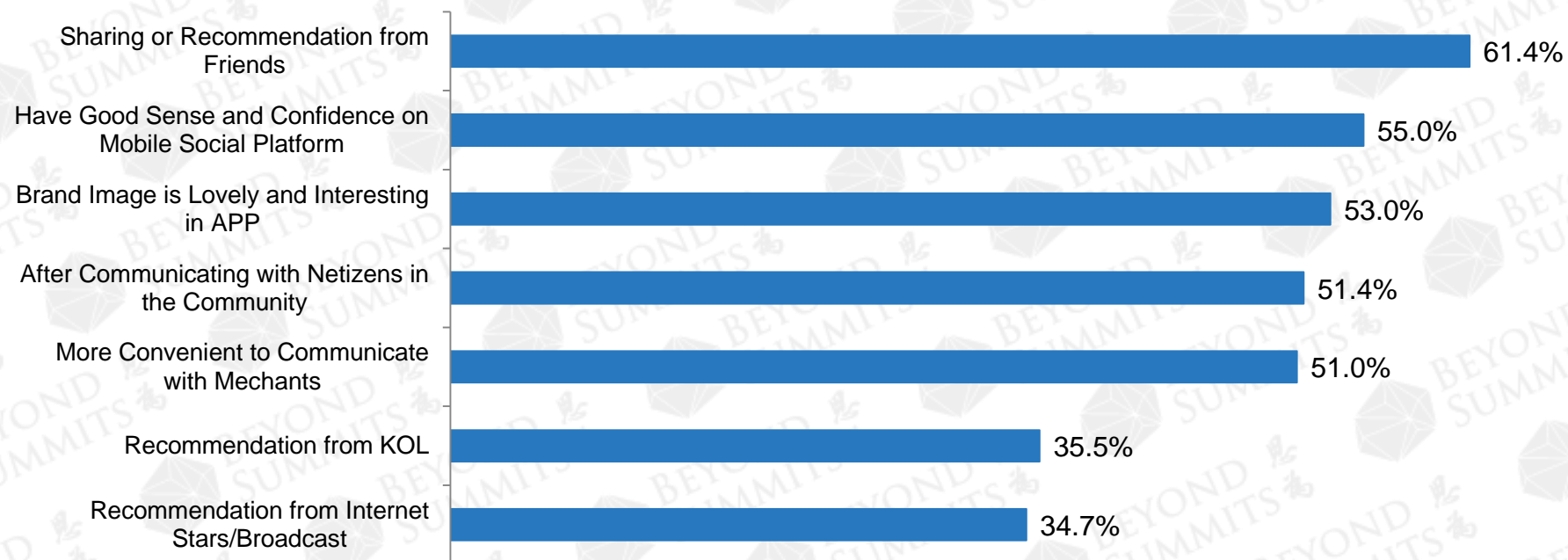
Factors Impacting China's Mobile Social Users' Focusing on Feeds Ads



Source: iResearch Insight Report on China's Mobile Social User

According to the survey, it was found that the main driving factors to promote the purchase in mobile social app were the sharing and recommendation from friends or netizens, accounting for more than 60% of the total.

Factors Promoting China's Mobile Social Users to Buy in Mobile Social APP

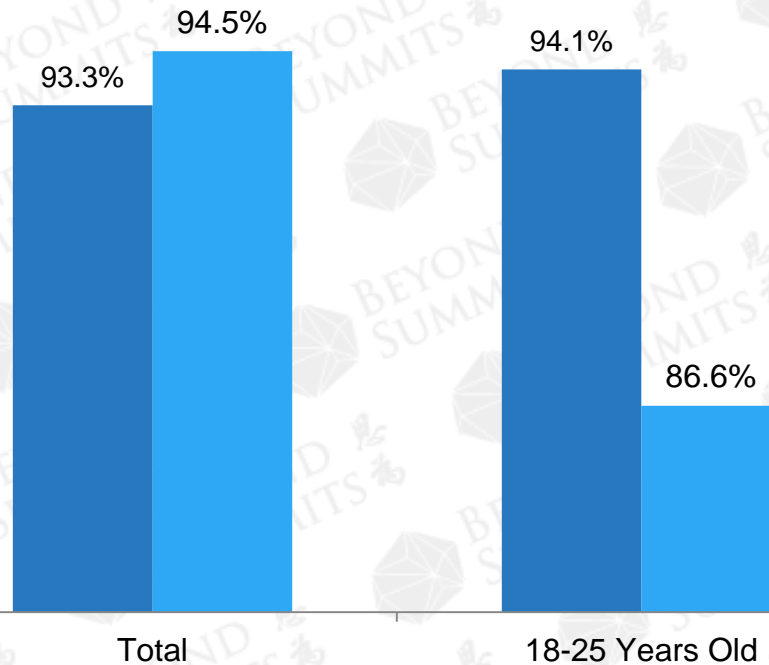


Source: iResearch Insight Report on China's Mobile Social User

In 2017, the overall coverage and daily activity of WeChat continued to increase. However, among young citizens at the age of 18-25 years old, the coverage of WeChat declined.

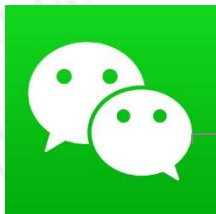
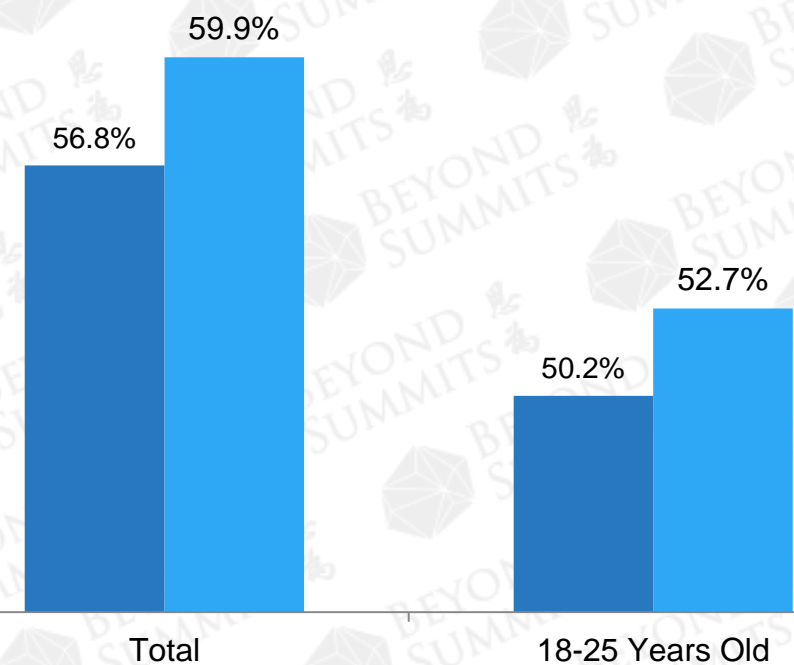
Coverage of WeChat

■ 2016 ■ 2017



Daily Activity of WeChat

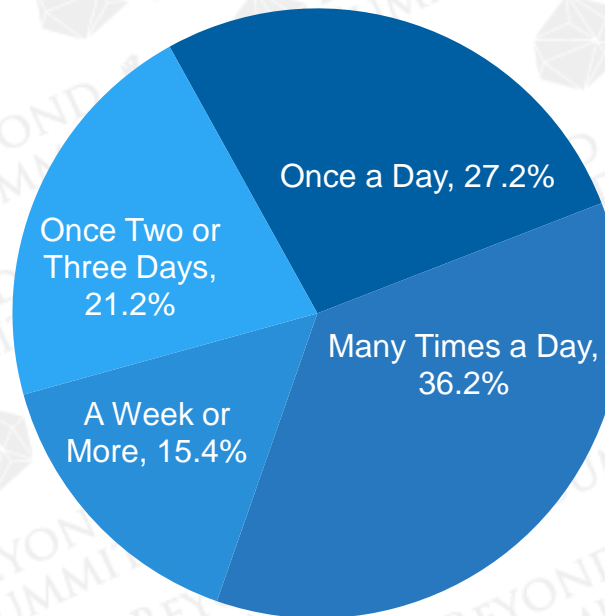
■ 2016 ■ 2017



Source: Kantar, Report on China's Social Media Influence, 2017

WeChat has become part of our lives with a high frequency of use, and 63.4% of users used it at least once a day.

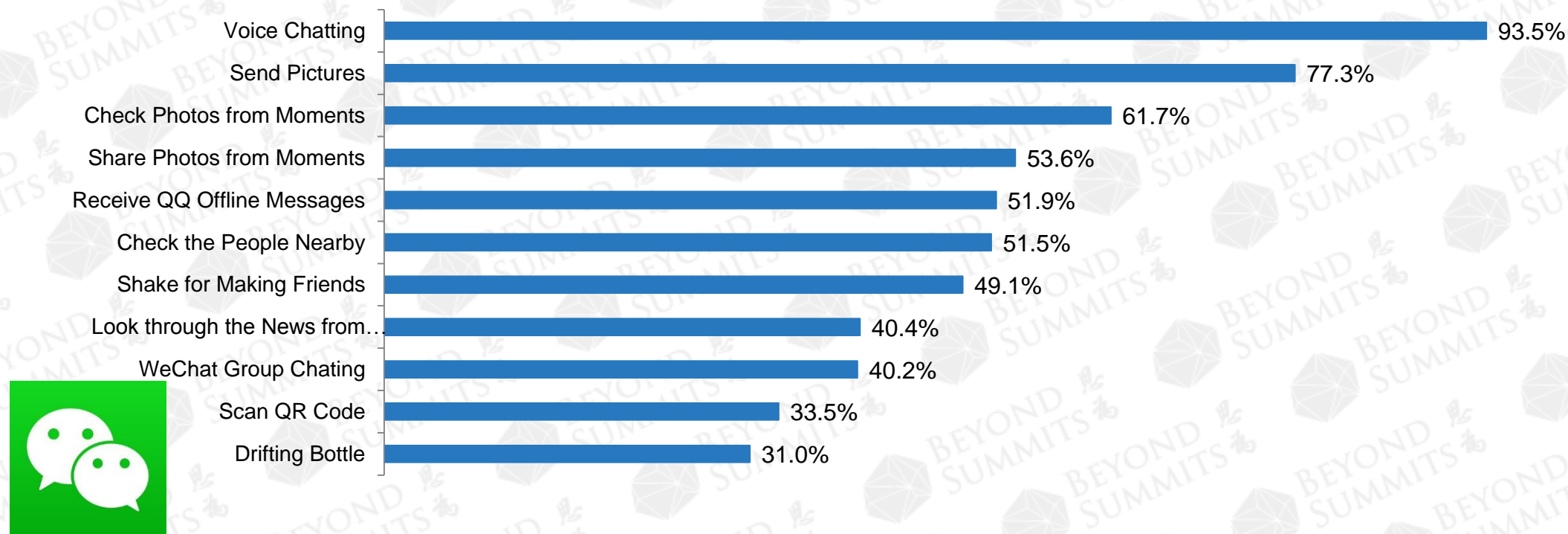
Frequency of Users Using WeChat



Source: 2017 Analysis Report of WeChat Users' Behavior

Voice chatting was the main function of WeChat for users, accounting for more than 90% of the total, followed by sending pictures. WeChat made it possible to make voice calls and sending pictures for free, and its convenient and free features accurately captured the users' needs.

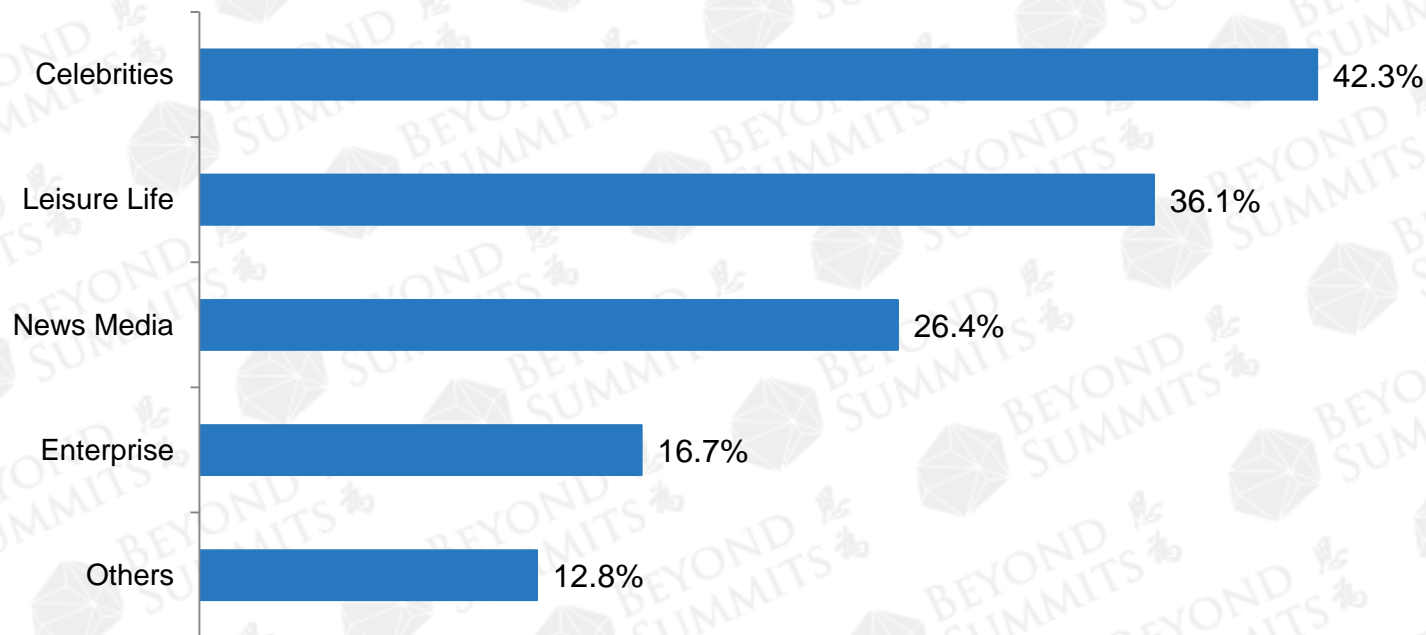
Main Function Used by WeChat Users



Source: 2017 Analysis Report of WeChat Users' Behavior

Celebrity and star was the most popular WeChat subscription users followed, accounting for 42.3% of the total. Next came leisure life and news media, which indicates that WeChat subscription was an important channel for users to focus on fresh, interesting, and hot news.

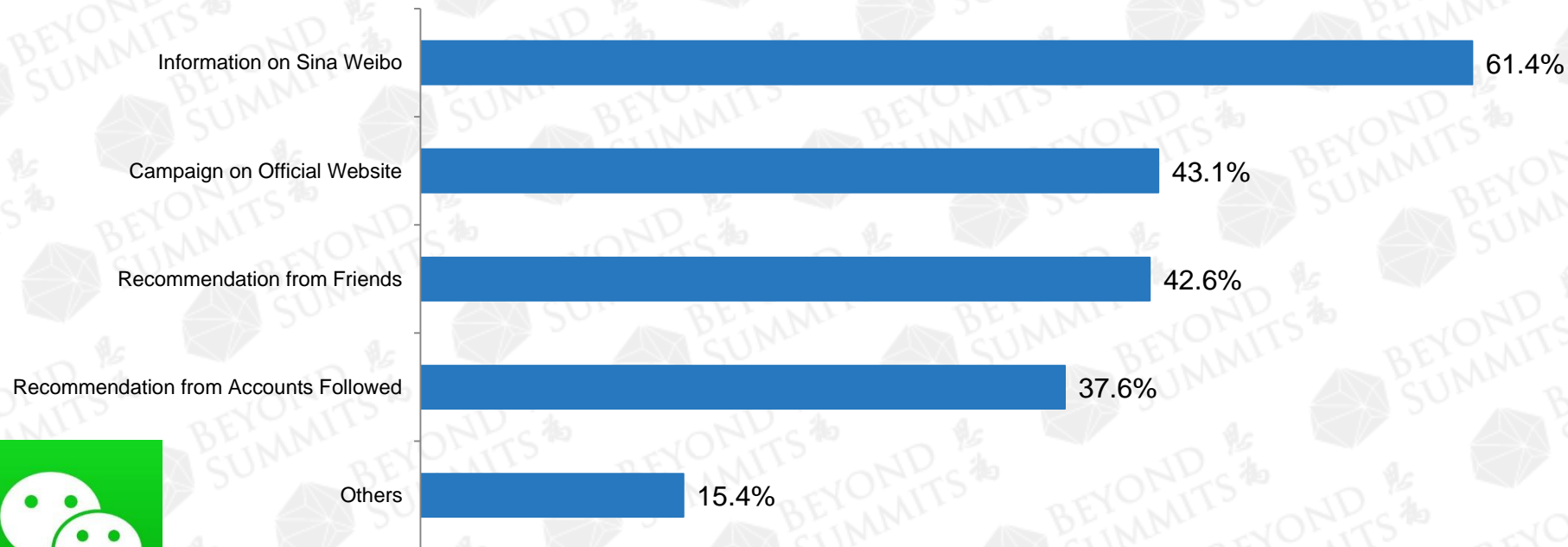
Types of Subscription WeChat Users Followed



Source: 2017 Analysis Report of WeChat Users' Behavior

WeChat users got the subscription information mainly through Sina Weibo, which accounted for more than 60% of the total. Moreover, the campaign on official websites and recommendation from friends were also main ways.

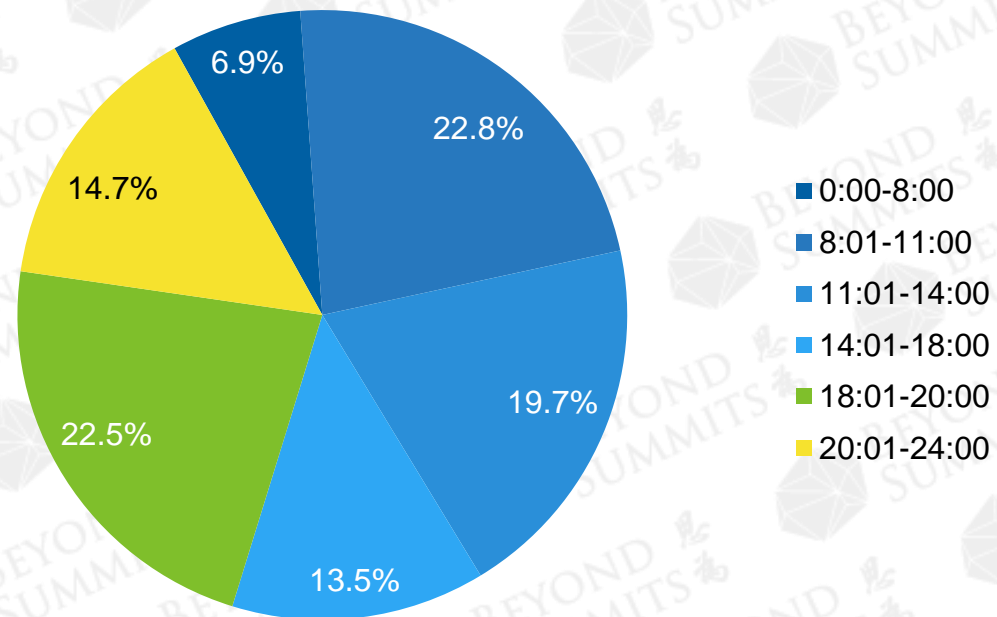
The Way to Obtain Subscription Information for WeChat Users



Source: 2017 Analysis Report of WeChat Users' Behavior

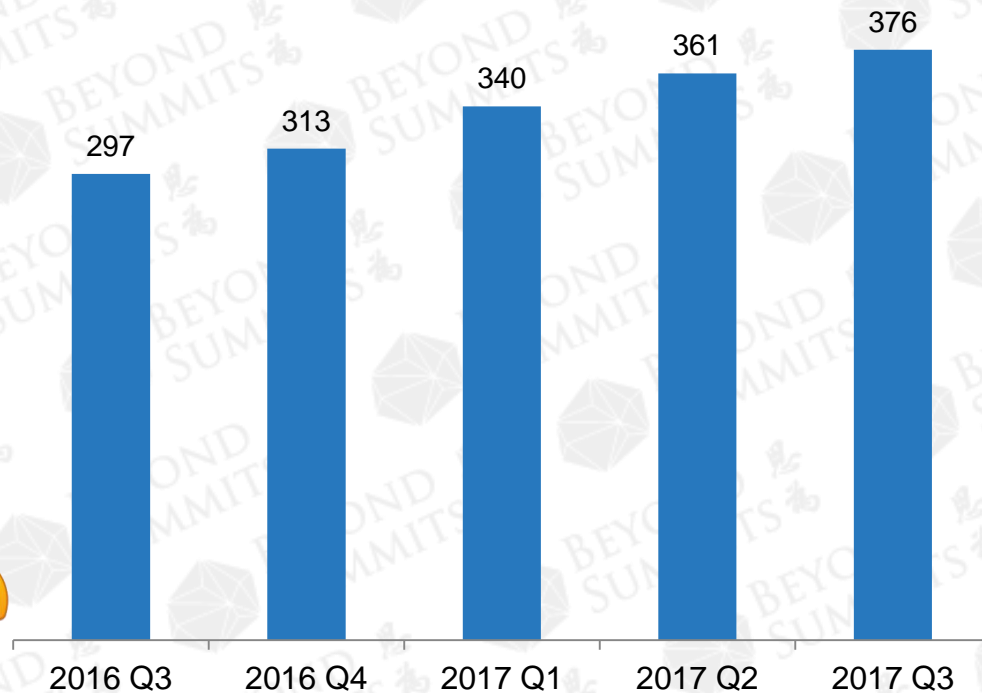
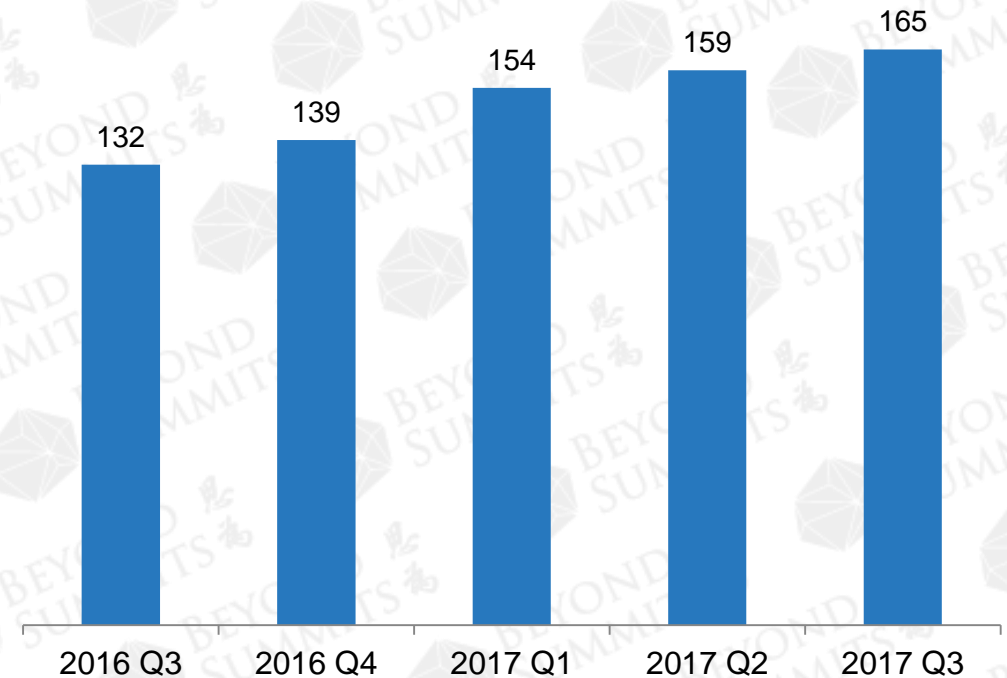
The data shows that 22.76% of the WeChat users wanted to receive subscription messages during the time period from 8:01 to 11:00, and the users are most reluctant to be disturbed at 0:00-8:00.

Time that WeChat Users Wanted to Receive the Subscription Information



Source: 2017 Analysis Report of WeChat Users' Behavior

By the September of 2017, the number of monthly active users (MAU) of Weibo increased to 376 million, up by 27% than the same period of 2016. The number of daily active users (DAU) grew up to 165 million in September 2017, up by 25% comparing to the same period in 2016.

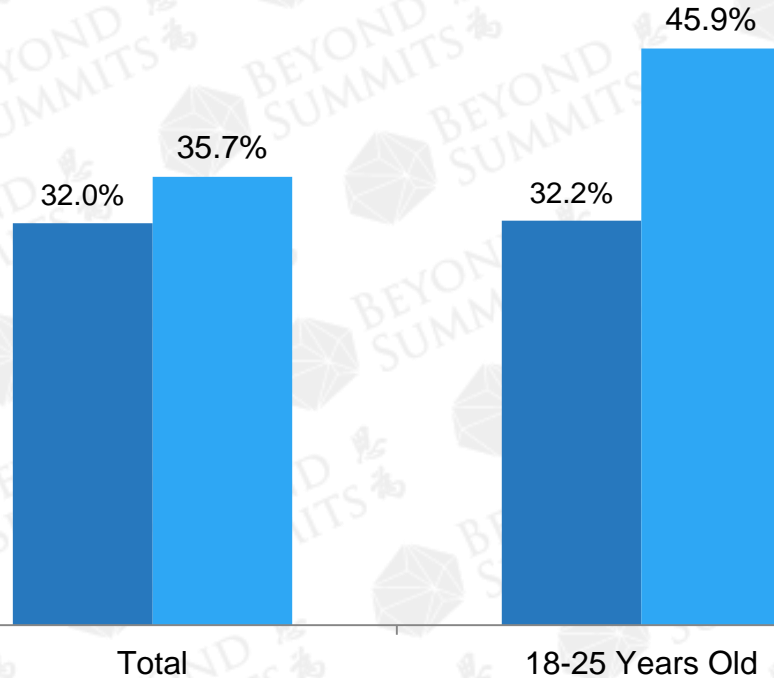
Sina Weibo's MAU (million)**Sino Weibo's DAU (million)**

Source: Report on Sina Weibo User 2017

In 2017, the overall coverage of Sina Weibo increased significantly. Compared to the overall coverage, Sina Weibo's influence in the younger Internet users has risen even faster.

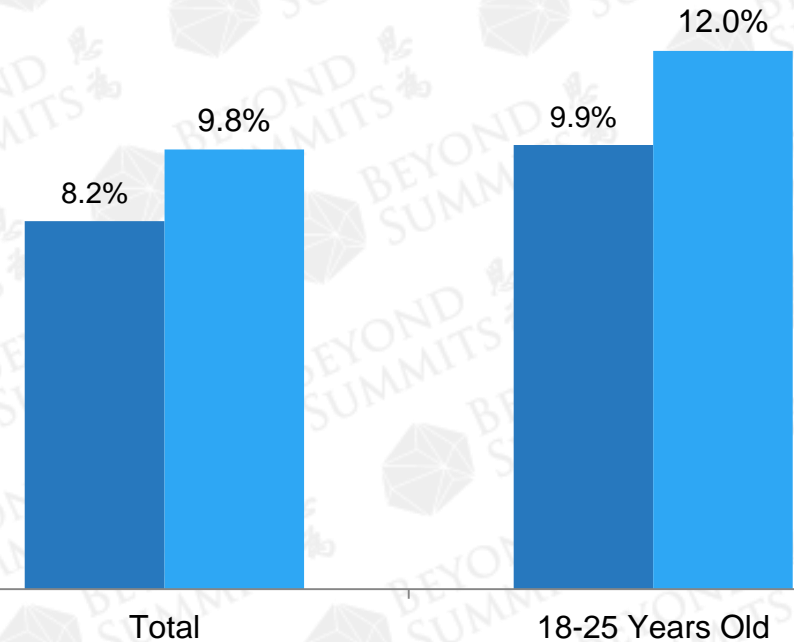
Coverage of Sina Weibo

■ 2016 ■ 2017



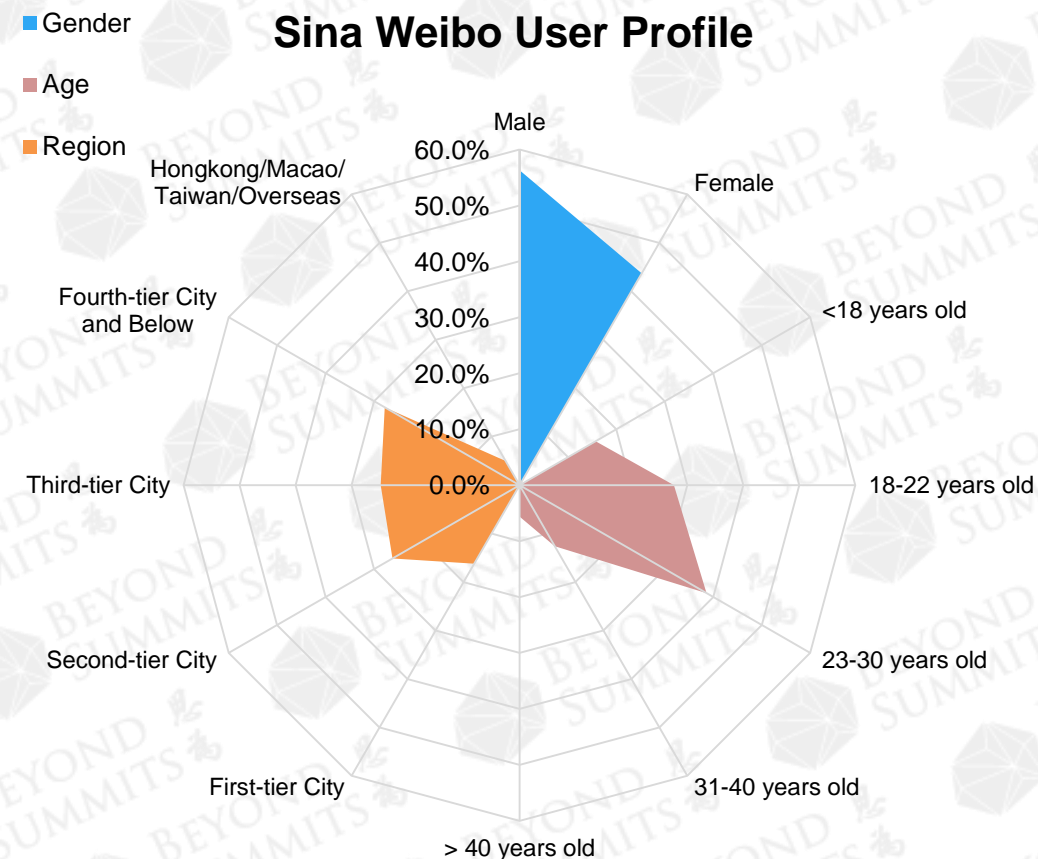
Daily Activity of Sina Weibo

■ 2016 ■ 2017



Source: Kantar, Report on China's Social Media Influence, 2017

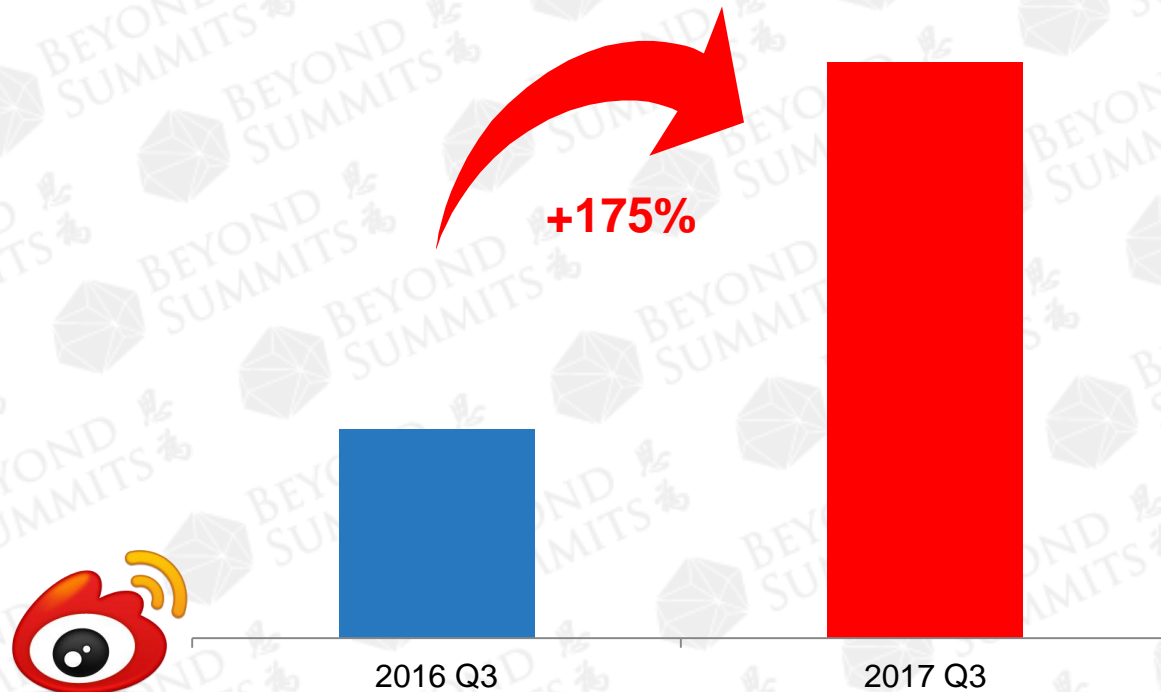
- Sina Weibo users' gender was well-proportioned, and the proportion of male users was a little higher than females.
- In terms of age, the proportion of people aged 23-30 is the largest, accounting for 38.6%, followed by 18-22 years old, 27.6%, showing that Sina Weibo's users are younger.
- Near 50% of Weibo users are located in third-tier and fourth-tier cities or below. Sina Weibo is now becoming the national social media platform.



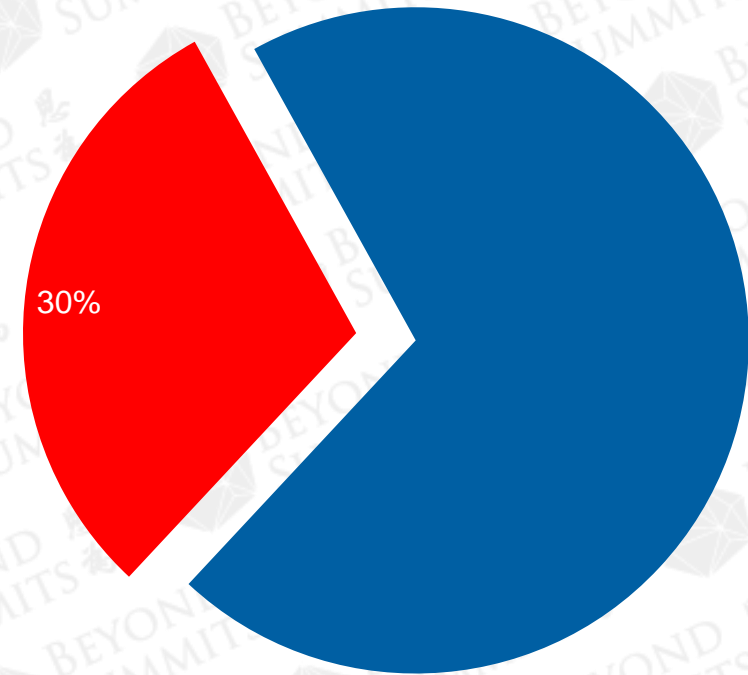
Source: Report on Sina Weibo User 2017

In 2017, Sina Weibo strengthened its layout in the short video, contributing to a significant increase in the amount of video playback and the release of high-definition video.

2017 Q3 YOY Growth Rate of Video's Views on Sina Weibo Platform



2017 Q3 Proportion of High-Definition Video's Release on Sina Weibo Platform



Source: Report on Sina Weibo User 2017

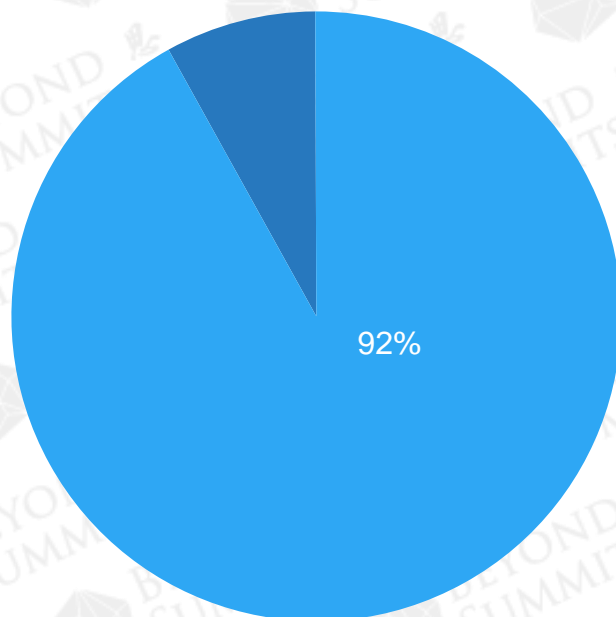
- In September 2017, Sina Weibo launched the Weibo Story to encourage ordinary user to create and share more short video content.
- By the end of September 2017, Weibo Story had near 40 million monthly active users(MAU), and the average daily users releasing Weibo Story increased by 200% over the last quarter.
- Among all Weibo Story monthly active users, women accounted for 69% of the total, and the users aged from 18-30 years old accounted for more than 75% of the total.



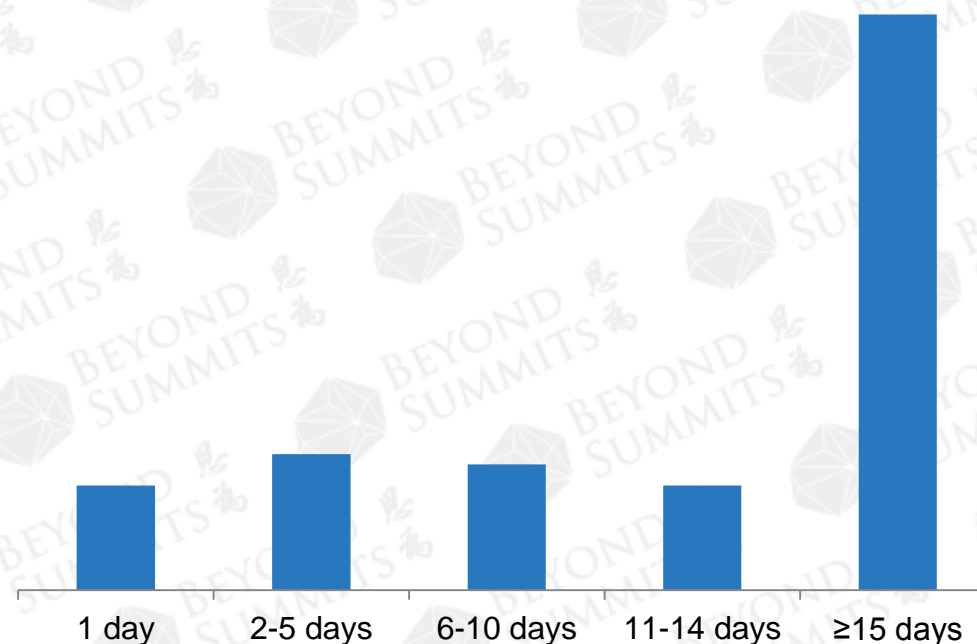
Source: Report on Sina Weibo User 2017

In terms of the user's usage habits, 92% of Weibo's monthly active users come from the mobile terminal, and the proportion of high-viscosity users with the average monthly login frequency of 15 days or more is the highest.

2017.9 Proportion of Sina Weibo MAU with Mobile Terminal



2017.9 Sina Weibo MAU's Login Frequency

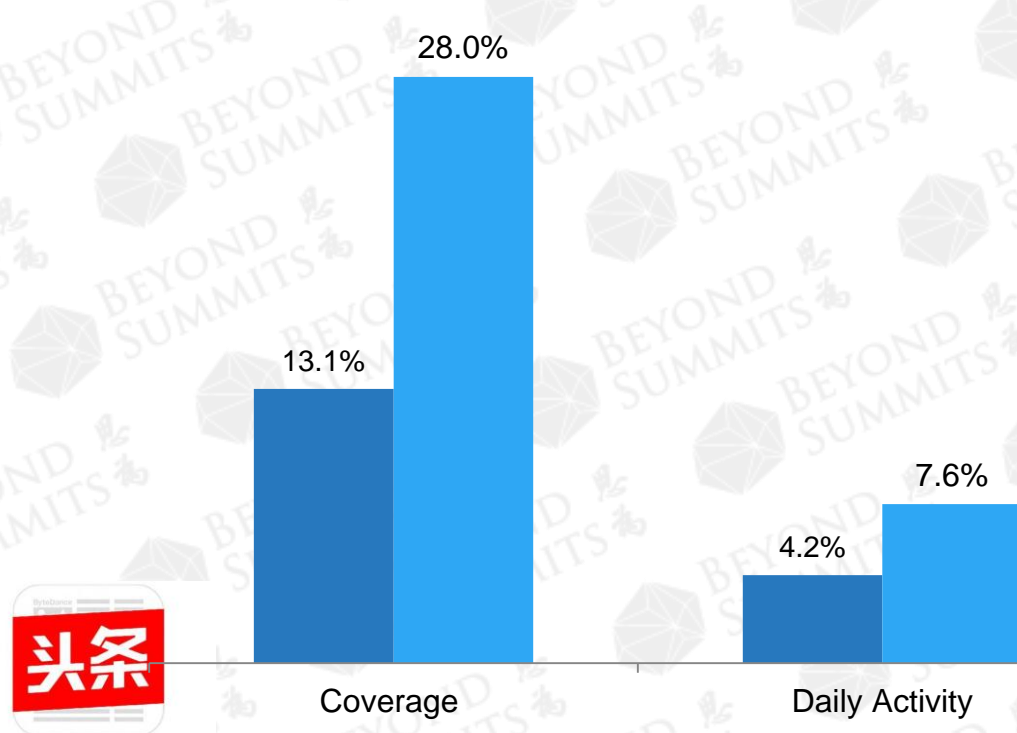


Source: Report on Sina Weibo User 2017

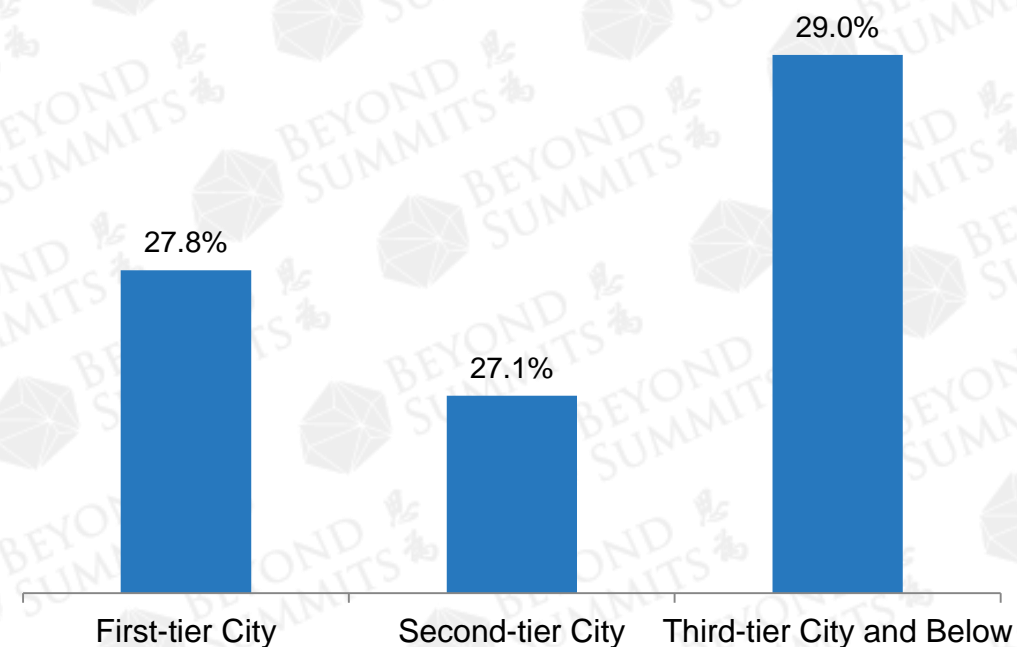
In 2017, the number of Toutiao users grew up rapidly with significantly increasing coverage and daily activity. Among all cities, the coverage of Toutiao in the third-tier cities and below was the highest, reaching 29%.

Usage of Toutiao

■ 2016 ■ 2017

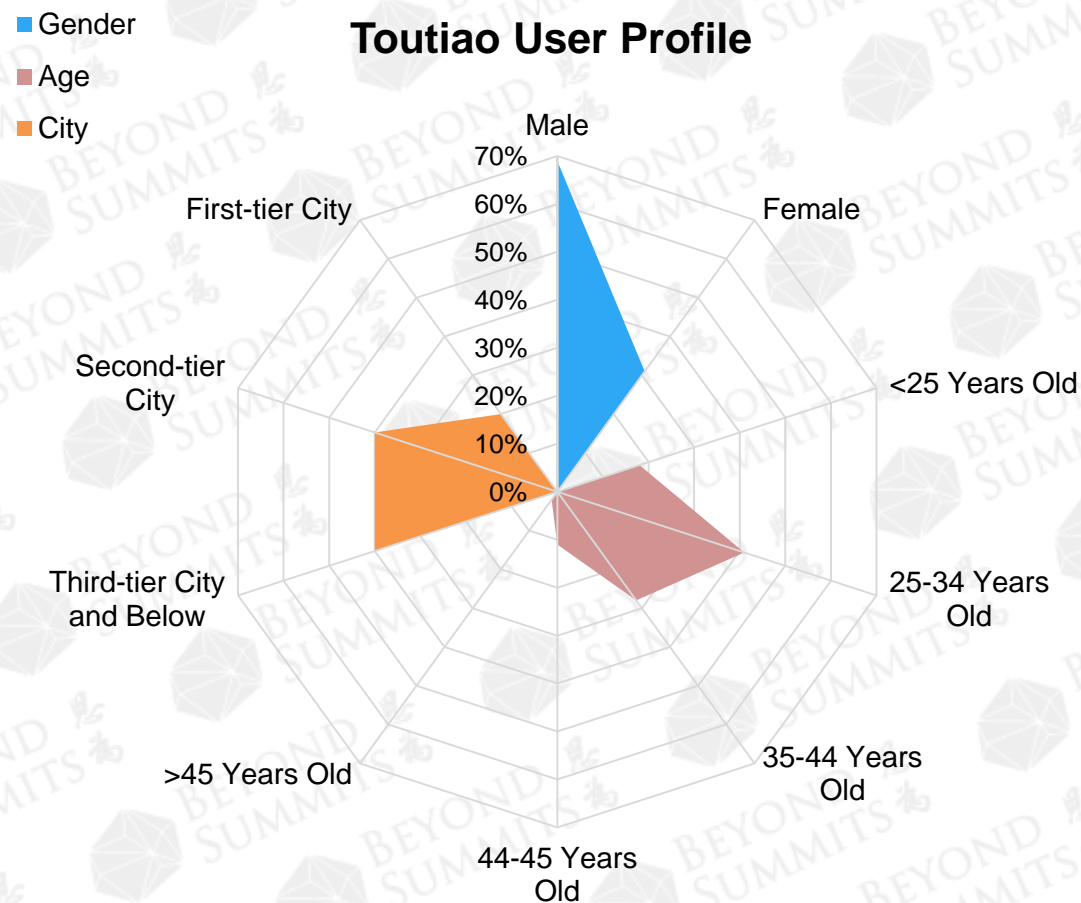


Toutiao's Coverage in Various Cities



Source: Kantar, Report on China's Social Media Influence, 2017

Among all Toutiao users, the proportion of male was much higher than female. Youth groups aged from 25-34 years old accounted for the largest proportion, reaching 41%. Geographically, users from second-tier cities accounted for 40% of the total.



Source: Kantar, Report on China's Social Media Influence, 2017



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