



The Ultimate Introduction to

Social Media in China

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 KAWO



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THE ULTIMATE INTRODUCTION TO SOCIAL MEDIA IN CHINA

TAKEAWAYS

Understand the rich & diverse social media landscape in China & the opportunities for your company to reach its target audience.

Last Updated Sun 14th June 2020.

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INTRODUCTION

As we emerge from the chaos that began 2020 there are 2 things that I'm certain of:

1. **Digital Platforms are more important than ever;**
2. **China is one of the countries most ready to start growing again.**

At KAWO we've spent much of the past 7 years trying to connect teams in the West and China. During this time, these online ecosystems have diverged significantly. Originally playing catch up, China is now in many ways indisputably ahead. 83% of users pay with their phone¹ and, not being beholden to advertisers, WeChat has avoided the privacy controversy that has plagued Western social platforms.

It can be hard to get your head around the complexity, depth and breadth of China's digital landscape. While there are dozens of good guides to specific networks, we couldn't find a good overview.

So we decided to write one.

Our initial target was to create the definitive introduction for a Western marketer trying to get up to speed on China. In the end I think we've created a guide with something for everyone interested in digital in China.

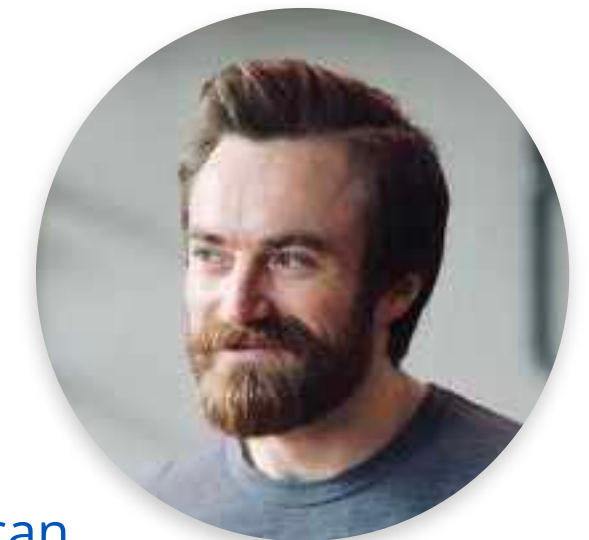
Although China has grown a lot over the past decade, researching this guide left us with a sense of the huge potential that still lies ahead. 64% of the population live outside of the top tier cities², only 31% are middle class³ and there are still 600 million people living on less than 1,090 RMB (US\$154) per month⁴.

The digital ecosystem has evolved at an alarming pace and while it has created opportunities for brands it brings challenges. There is stiff competition on the most popular platforms and a ferocious battle to hire and retain talent.

Creating this guide has been an immense undertaking and we hope you get as much from reading it as we did from researching and writing it.



















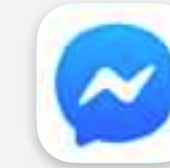


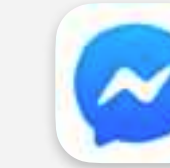







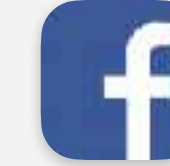




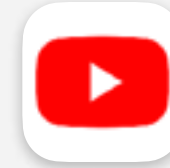



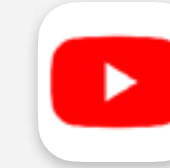









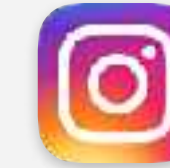





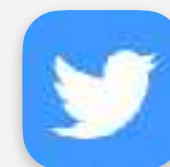

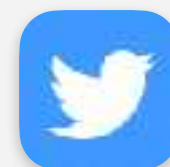
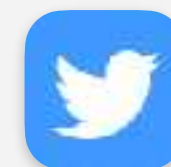
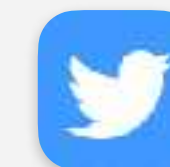
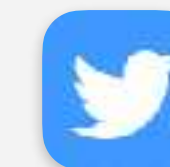
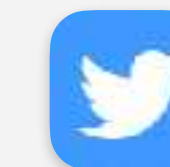
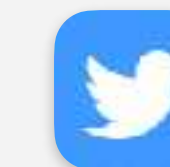



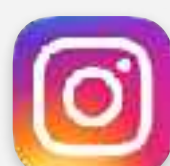


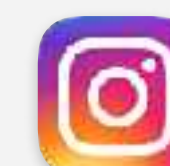
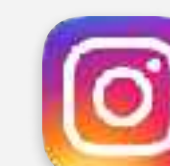
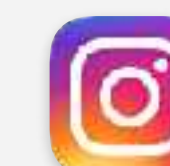
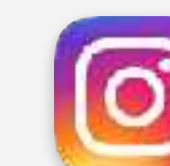
Alex Duncan
KAWO Co-Founder
[LinkedIn.com/in/acjduncan](https://www.linkedin.com/in/acjduncan)





Quick history of the Internet in China

MOST POPULAR SOCIAL APPS ACROSS TOP 10 ECONOMIES

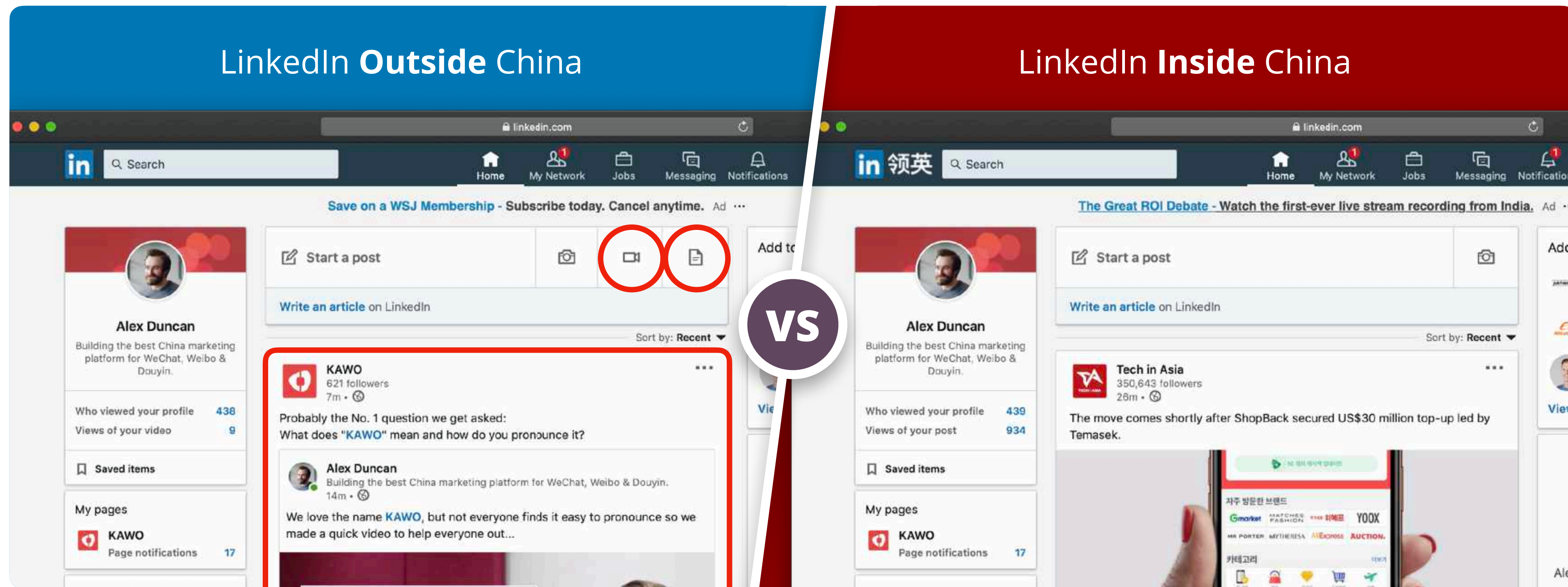
	 U.S.A	 China	 Japan	 Germany	 India	 UK	 France	 Italy	 Brazil	 Canada
Messaging										
Social Network										
Video										
Photo Sharing										
Social News										
Short Video										

CHINA'S UNIQUE INTERNET ECOSYSTEM

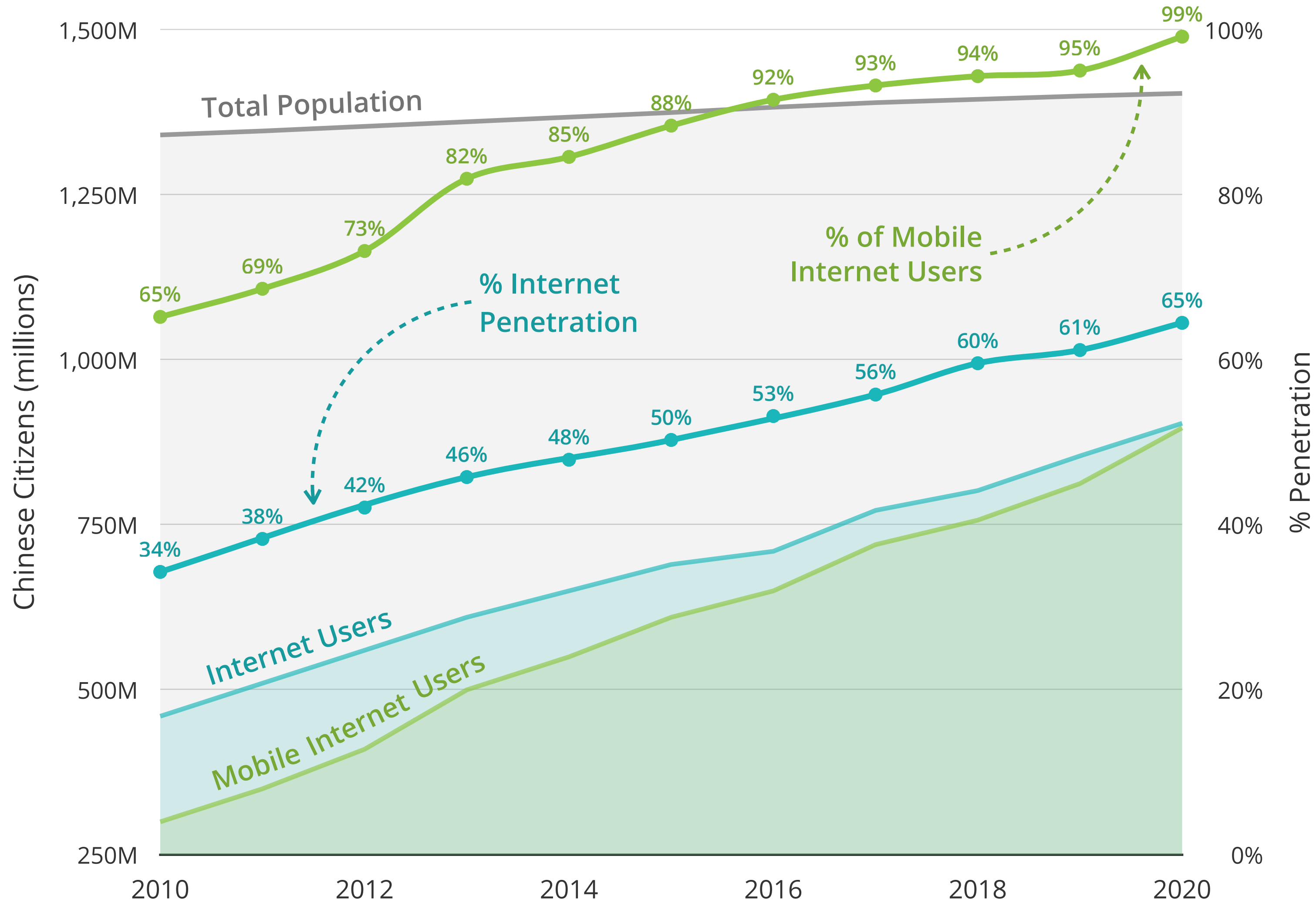


ONE NOTABLE EXCEPTION

LinkedIn is the only major Western social network that has managed to remain available in Mainland China by strictly complying with Chinese internet regulations. LinkedIn maintains servers in China, but **doesn't allow viewing or uploading of video content because it doesn't have the requisite licenses.**



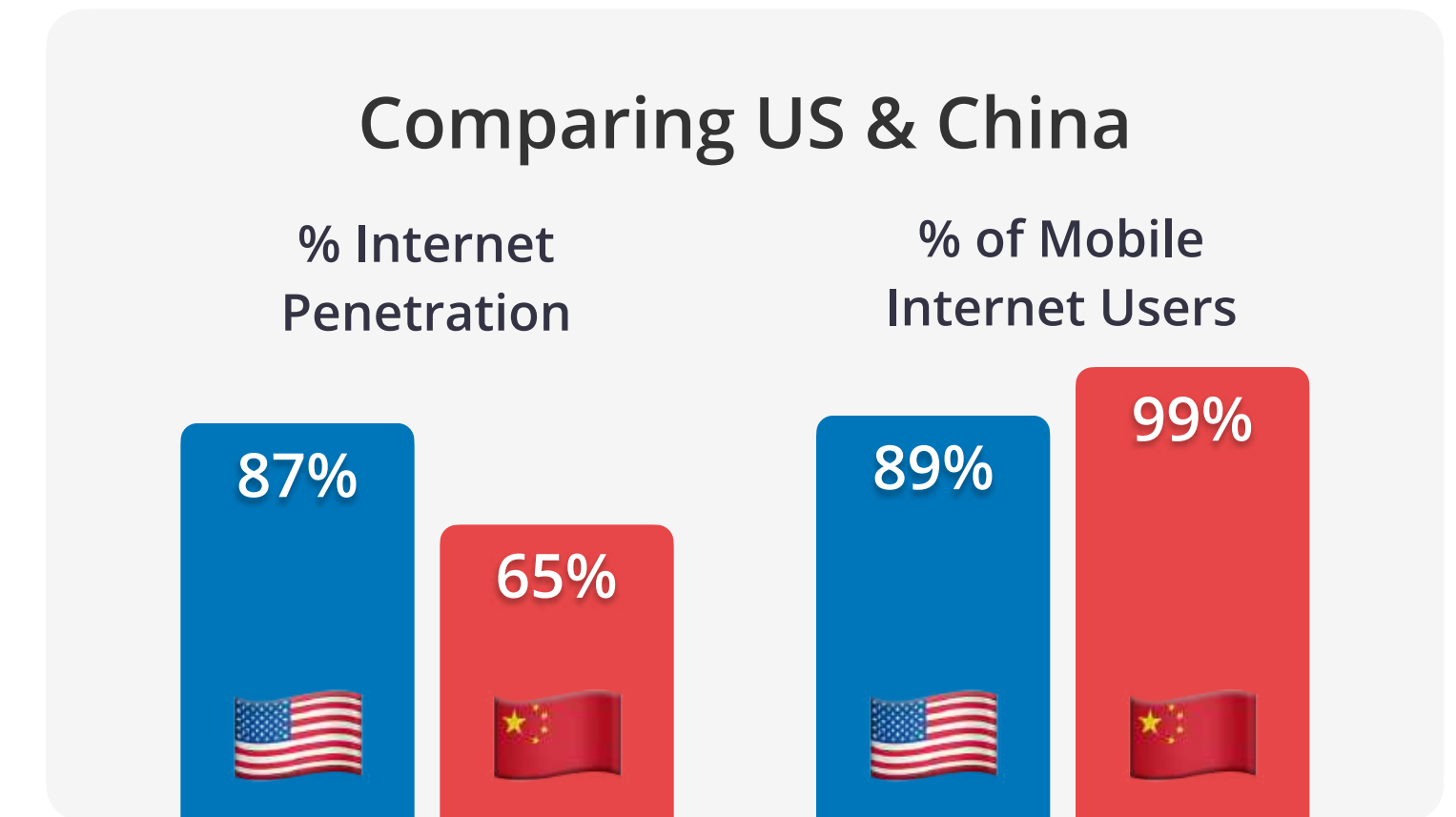
GROWTH OF INTERNET ACCESS IN CHINA



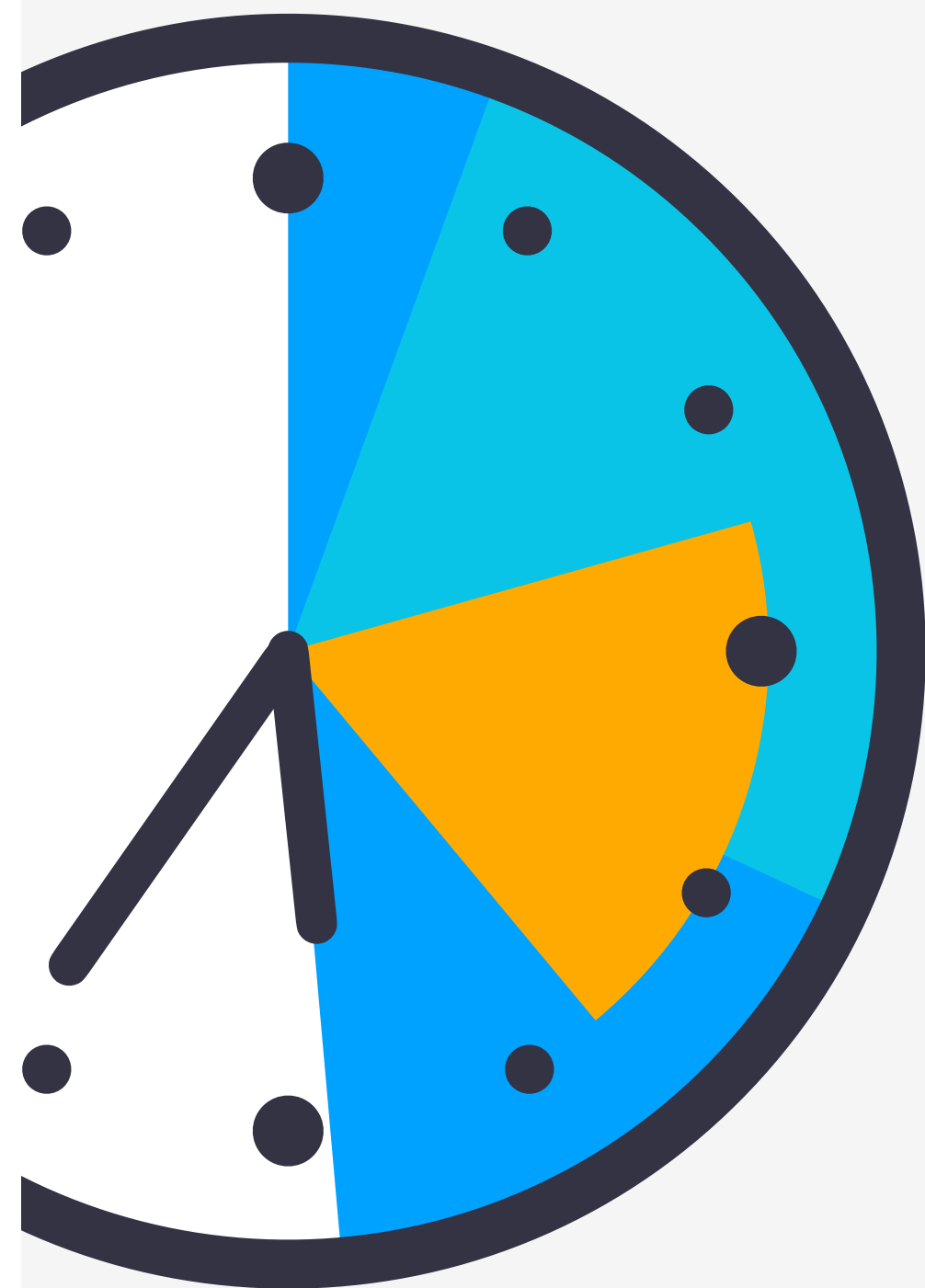
Out of the 904 million Chinese people now using the internet, 897 million people are on a mobile device. A whopping **99.3%** of the country's total internet user base.

The cheap cost of mobile data and the availability of budget smartphones from Chinese brands like Xiaomi & Huawei are the reasons behind this pervasive mobile adoption.

For the millions of Chinese joining the internet it's not just "Mobile First" but "Mobile Only".



HABITS OF CHINESE 'NETIZENS'



Each day the average netizen spends

5hrs 50mins

online, of which about

3hrs 10mins

of that time is **on a mobile device** and

2hrs 12mins

using **social media**.

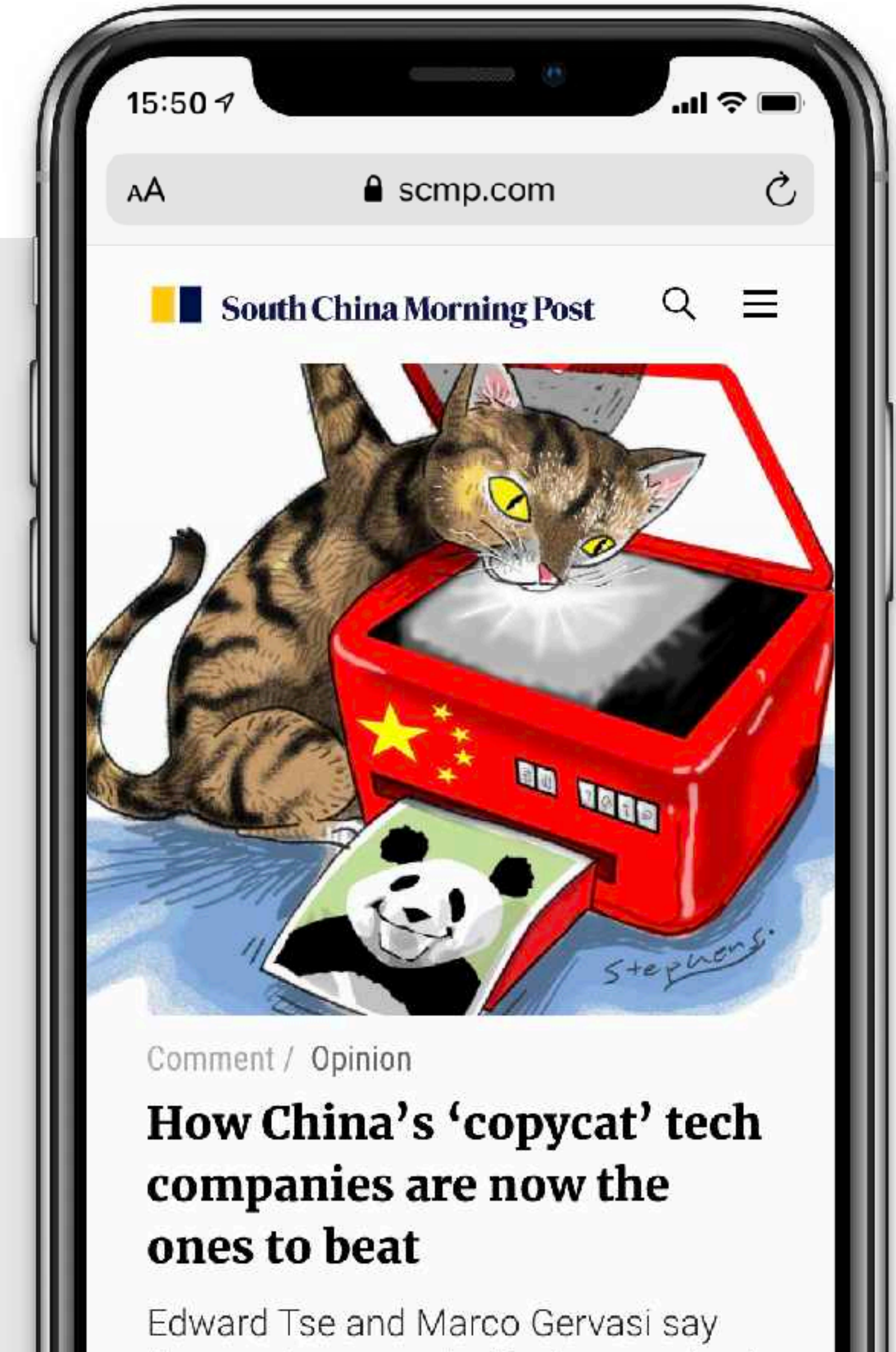
76%

of internet users
post online frequently
(compared to just 41% in the US)

53%

of internet users "share
everything they do" online
(compared to 28% in the US)

FROM COPYCAT TO LEADING THE WORLD



MARK ZUCKERBERG ADMITTED HE COULD LEARN FROM WECHAT

March 2015

theinformation.com

The Information

NEWS ANALYSIS FACEBOOK ASIA

What Facebook Should Learn from WeChat

By Jessica E. Lessin

March 25, 2015 12:12 PM PDT

Messenger Platform

Facebook CEO Mark Zuckerberg speaks to developers Wednesday. Photo by Bloomberg.

Facebook today announced big plans to open up Messenger to developers. This

March 2019

Jessica E. Lessin is feeling amused.

8 March 2019

Four years ago: The Information: What Facebook Should Learn from WeChat

Messenger Platform

THE INFORMATION.COM

What Facebook Should Learn from WeChat

Facebook today announced big plans to open up Me...

Like Comment Share

98

Mark Zuckerberg

If only I'd listened to your advice four years ago...

1y Like Reply

92

Jessica Lessin
Editor of
The Information

Mark Zuckerberg
CEO of
facebook



Diversity of China



DIVERSITY OF CHINA

For a country the size of a continent, on the surface China appears less diverse than Europe or North American. Among the 1.4 billion inhabitants of China, 91.6% are from the same ethnic group, 73% of them speak the same language (Mandarin) and 74% have no specific religious affiliation.

However it is easy to make sweeping generalizations about the uniformity of China and miss the different types of diversity that exist. China is made up of 30 country-sized provinces. Regional differences are huge: the experiences of someone from a modern, costal city like Beijing or Shanghai will be dramatically different to someone growing up in less developed parts of inland China.

KEY TAKEAWAY

For brands there is such thing as a typical “Chinese consumer”. The country is so large that even a niche audience can be massive and it’s important to do research and understand where to find your target consumers.

Chinese Provinces & Nearest GDP Equivalent

2010 \$bn



Credit: The Economist, Feb 2011

BREAKNECK ECONOMIC GROWTH

China's GDP has grown 95x in the past 40 years. This unprecedented economic growth has continued unabated through 5 financial crises. 800 million citizens have been lifted out of poverty and immense wealth has been created. This rapid growth has come with many opportunities, but also challenges, as people (and brands) struggle to keep pace.

1978 Economic reform. "Reform and Opening-up" to foreign investment and established special economic zones.

1987 First KFC opens in Tiananmen Square in Beijing.



1995 Leisure time increases as government reduces working week from 7 days to 5 days.


1999 First Starbucks opens in Beijing.

Middle class reach 29M people (2% of population).



2001 China admitted to the World Trade Organization.

2008 Beijing Olympics



2010 China becomes the World's 2nd largest economy.


2011 Best Buy becomes one of the first Western companies to admit defeat and withdraw from China.



2013 4G Launches.

Middle class reach 420M people (31% of population).

2019 Starbucks reaches 4,300 stores in China.

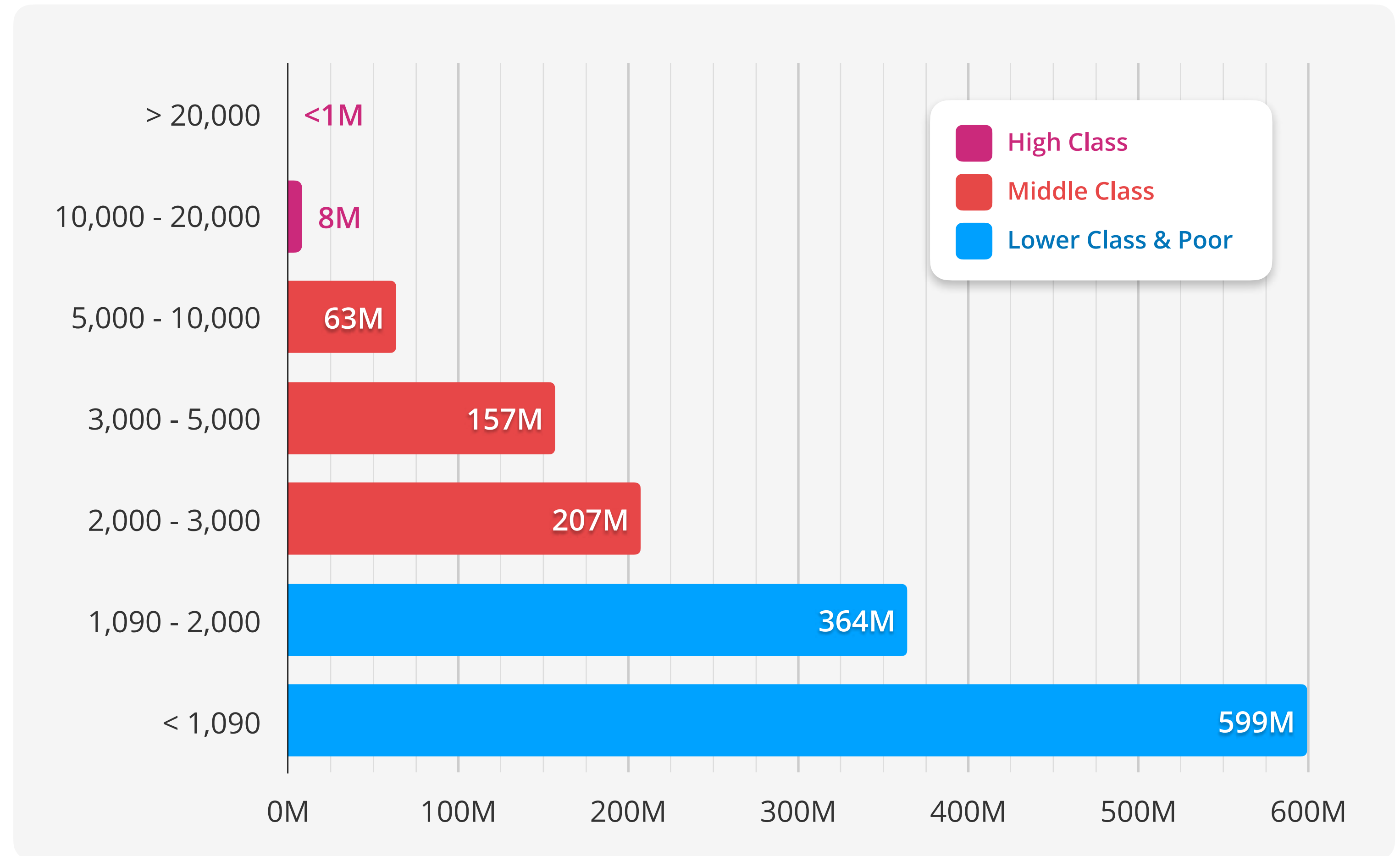


MONTHLY HOUSEHOLD INCOME (RMB)

According to The World Bank China has lifted 850M people out of poverty. More than any other country in world history. China's poverty rate has fallen from 88% in 1981 to just 0.7% by 2015.

During a similar period the middle class has boomed to over 435M people. However as this chart shows 963M or 69% of the Chinese population are still categorized as 'Lower Class' or 'Poor' so there is still almost 1 billion people whose economic fortunes we can expect to improve as China's development continues.

At this point in time the majority of Western brands are targeting people with monthly incomes in the top 10% of China.



DIVERSITY OF CHINA
CITY TIERS

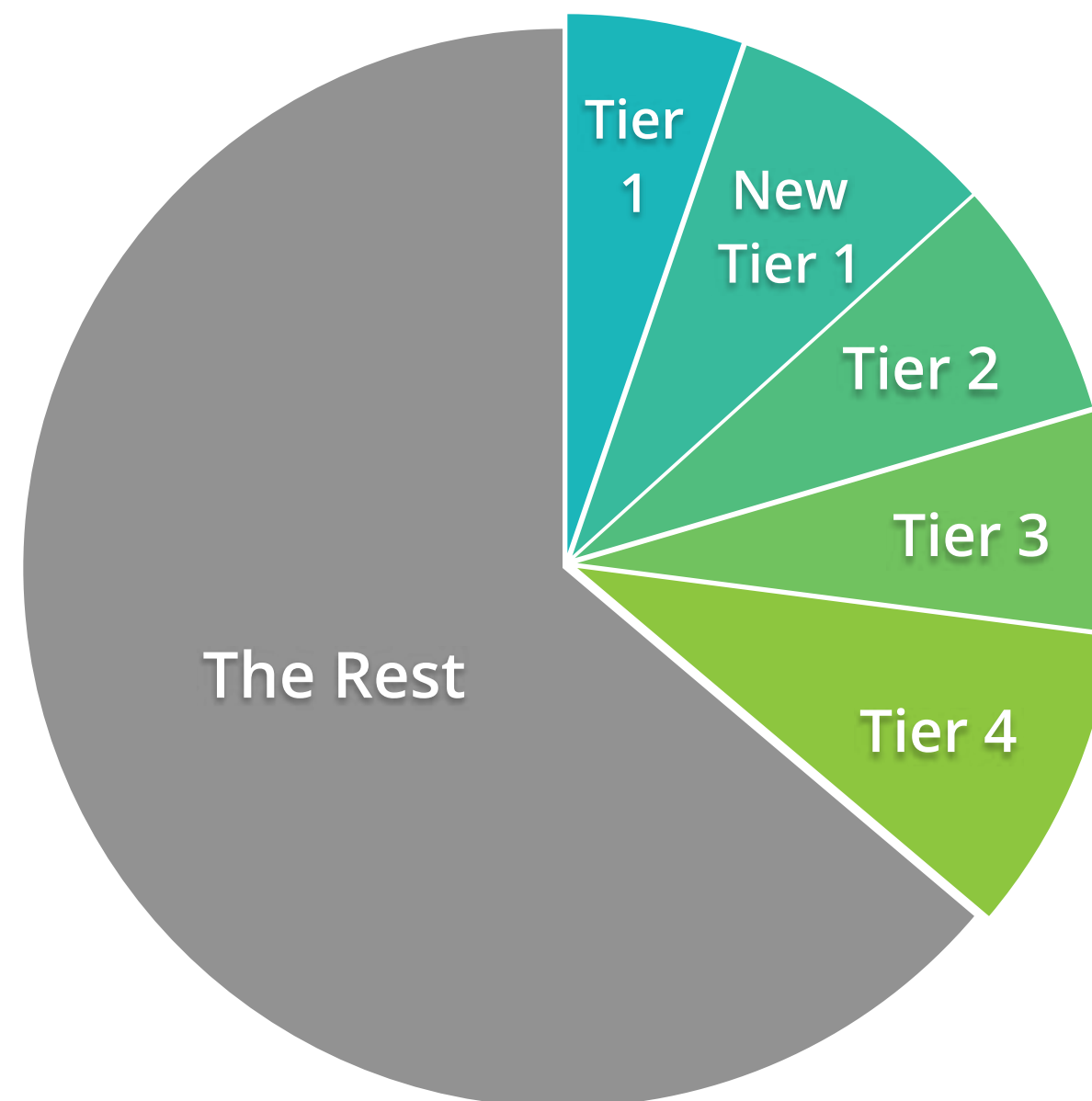
Chinese cities are unofficially divided into tiers based on economic growth and consumer sophistication.

Tier 1 cities, Shanghai, Beijing, Shenzhen and Guangzhou, are the most developed economically. There is a significant difference between the purchasing power and sophistication of consumers from 1st and 2nd tier cities compared to 3rd, 4th and below.

The majority of customers for Western brands live in top tier cities, meaning you are only targeting a subset of Chinese consumers. **64% of the population is still located in rural areas.**

KEY TAKEAWAY

There is huge future growth potential as lower tier cities continue to develop. Brands need to develop different strategies to target consumers from lower tier cities.



	# of Cities	Population	% of Total
Tier 1	4	72,949,733	5.2%
New Tier 1	15	112,141,974	8.1%
Tier 2	30	99,984,658	7.2%
Tier 3	63	91,688,617	6.6%
Tier 4	223	127,111,816	9.1%
The Rest	-	889,123,202	63.8%



INTERACTIVE GUIDE

China's tiered city system explained

Awesome interactive guide to the different tiers of cities in China.

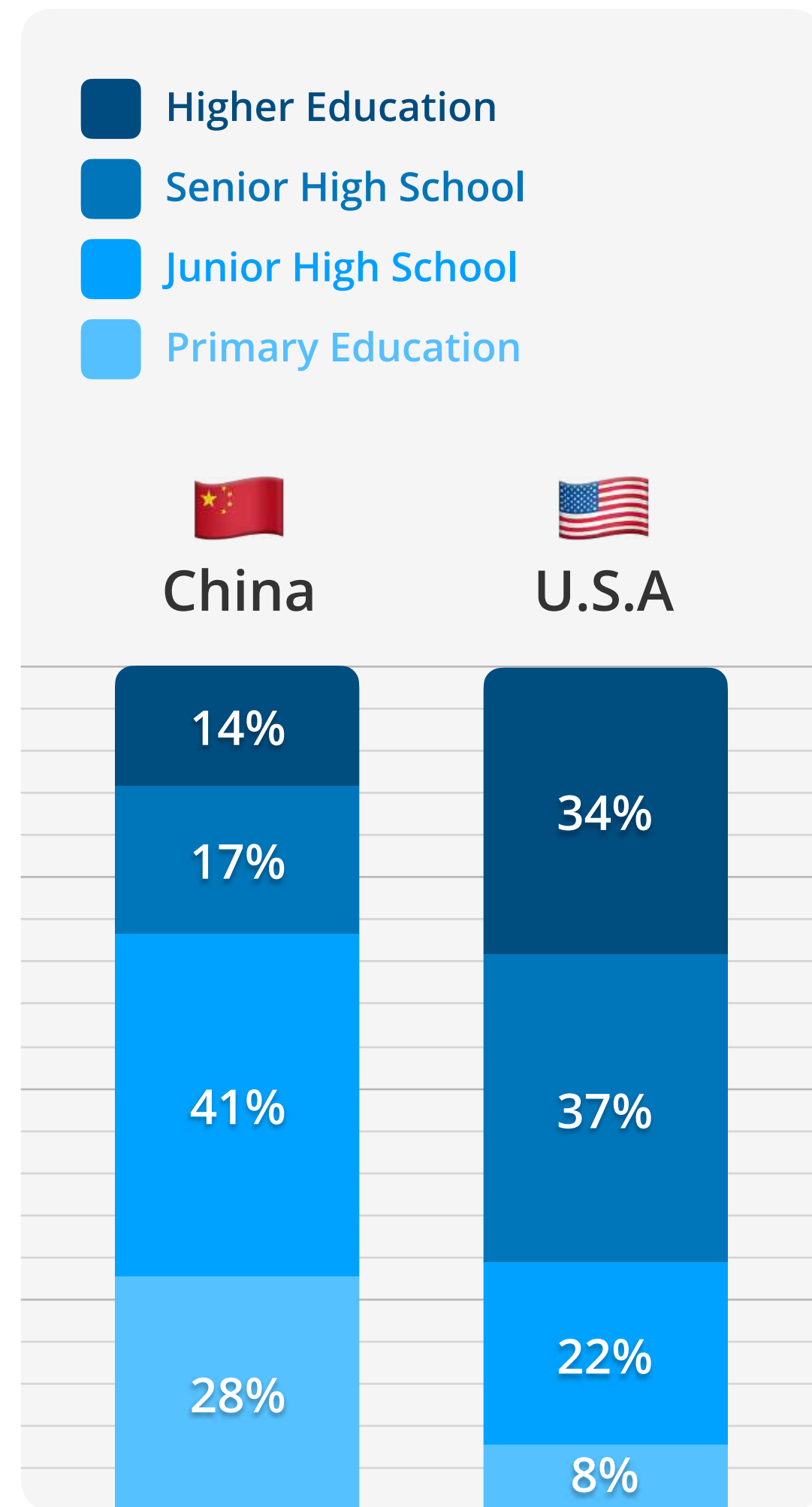
multimedia.scmp.com/2016/cities

Urban legend:
China's tiered city system explained

Tier systems are widely used to classify Chinese cities. The tiers are used by analysts to study consumer behaviour, income level, politics, and local trends to help tune strategies to local conditions.

What's a city tier and how is it assigned?

EDUCATION IN CHINA



LESS EDUCATED POPULATION

Although spending has increased dramatically in recent years, education levels in China still lag behind other major economies. 28% of the Chinese population has only primary education (up to 11 years old) and the length of compulsory education is only 9 years, instead of 12 in most of the rest of the developed world. In 2018 China spent 4.1% of GDP on education compared to an OECD average of 5%

EDUCATION THE PRIORITY

However, China is quickly catching up on education. In 2016, China was opening one university per week and now produces more than 8 million university graduates each year, more than the U.S. and India combined. China is also making strides in academic research. In 2018, more academic papers were published by Chinese researchers than by U.S. scholars.

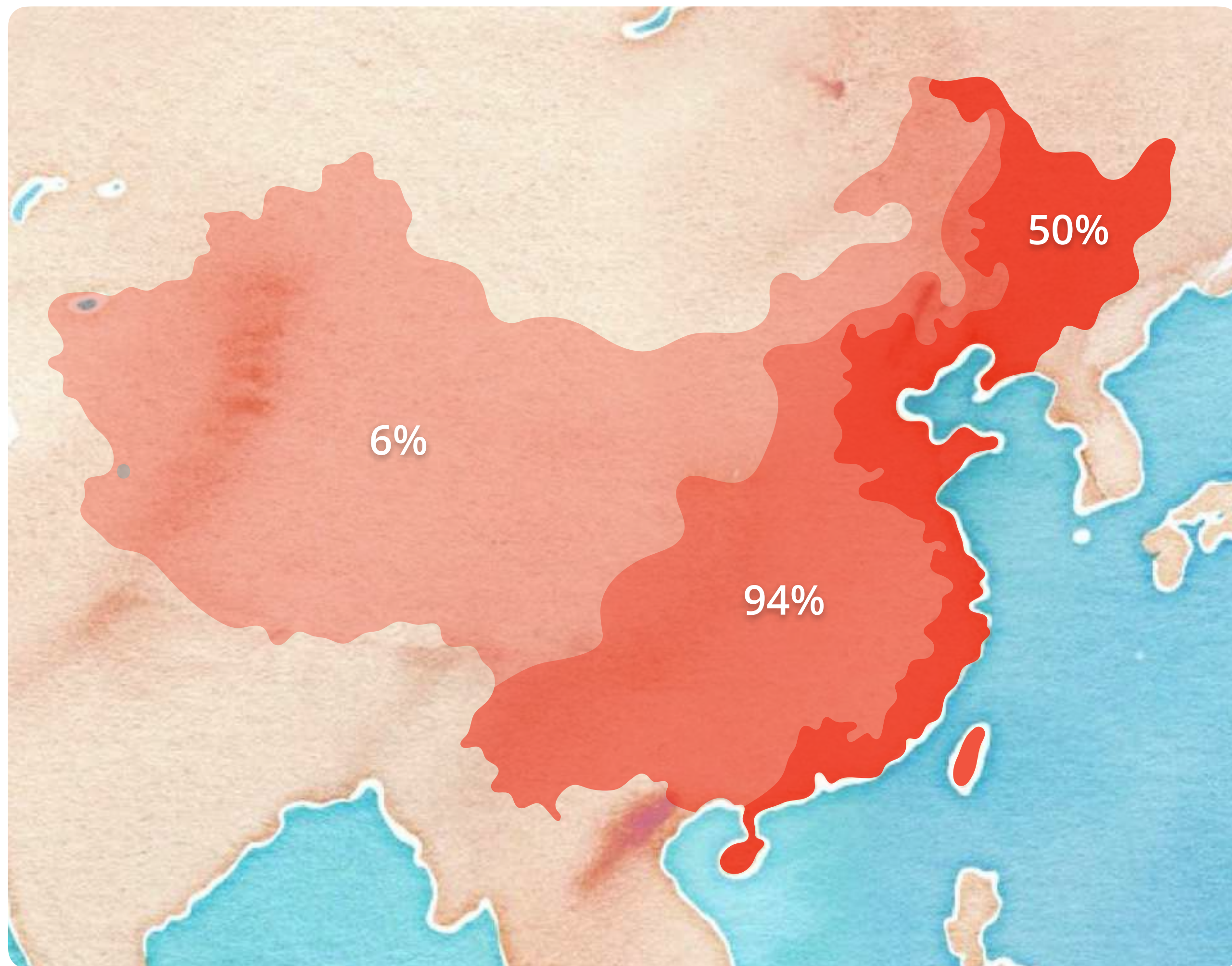
Private investment in education is also booming. Parents invest huge amounts in private tutoring for their children to ensure they succeed at school and get into the best universities. In 2018 662,000 Chinese students travelled abroad to study at foreign universities with only 65,800 supported by public funding. The government has also set a target to recruit 500,000 foreign students a year to study in China at Chinese universities.

KEY TAKEAWAY

A large proportion of Chinese consumers still have a lower level of education. They've also grown up being exposed to a very different culture.

Brand values and messages that might have worked overseas may fall flat in China. Brands need to be nimble and locales and adapt their strategies to reach their customers in different ways.

GEOGRAPHIC DISTRIBUTION



JOURNEY TO THE WEST

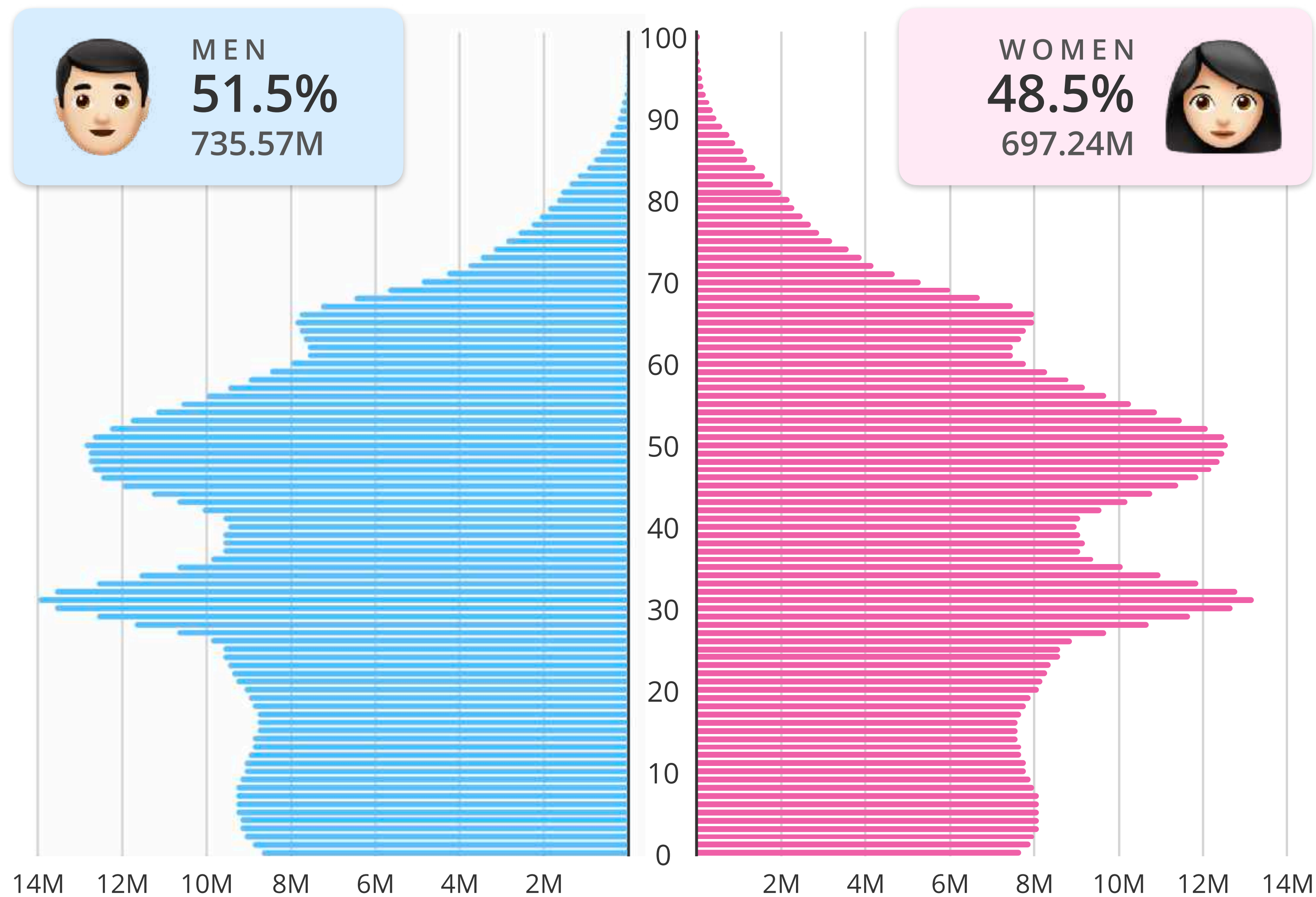
China is the 4th largest country on earth, but the population is heavily concentrated with 50% living in the Eastern coastal region. In recent years the Chinese government has invested heavily in central and western areas of China to redress this imbalance. 40,000km of new high speed rail lines have been built, bringing travel times previously measure in days down to just a few hours.

The One Belt One Road Initiative (OBOR), is another massive infrastructure program bringing investment to Western China. Started in 2013, the “New Silk Road” is a sprawling network of roadways, railways, maritime ports, and oil and gas pipelines connecting Europe and Asia.

KEY TAKEAWAY

As infrastructure improves we can expect prosperity to increase in more remote areas of China bringing new opportunities to brands to access new consumers.

CHINA GENDER & AGE DEMOGRAPHICS



The two huge peaks show there is clearly something strange going on with China's population age distribution.

The first peak, consisting of people who are now around 50 years old, comes before the implementation of the of the "One Child Policy" by the Chinese government in 1979.

The second peak, consisting of people around 30 years old, is a result of the previous peak generation reaching the age at which they had their own children.

In common with many other countries around the world China has an aging population. The graph also shows the long-term historical imbalance favoring male offspring.

CHINA DEMOGRAPHIC CHALLENGES

GENDER BALANCE

China's one-child policy has resulted in a significant gender imbalance. For every 100 women, there are 117 men, meaning **there are currently 30 million more men than women**, the equivalent of almost the entire population of California. Despite reform to China's family planning laws, this imbalance is still increasing.

Entire industries have cropped up to cater for the estimated 24 million single Chinese men of marrying age. For example, young female live-streamers can now build lucrative careers from digital gifts bought by their thousands of male fans.

KEY TAKEAWAY

Many young Chinese living in cities heavily prioritize their careers over personal and family life. Pressure on middle class white collar workers is higher than ever. Due to an inflated housing market, supporting older generations, rising cost of living and raising children. Some brands have seen success from being more empathetic and not painting a too over-idealised picture of modern life.

AN AGING POPULATION

Like many countries, China is facing an aging crisis as birth rates have fallen and longevity has increased. Despite measures taken by the government, such as scrapping its one-child policy in 2016, it is projected that by 2050, **487 million people will be 60 or older**, representing almost a third of the Chinese future population.

A range of measures are being considered to alleviate this crisis including pension reform and further subsidies for larger families.



INTERACTIVE GUIDE

Too Many Men


Great analysis by The Washington Post of China's Demographic challenges.

[WashingtonPost.com/graphics/2018/world/too-many-men](https://www.washingtonpost.com/graphics/2018/world/too-many-men)





Tech Rivalries in China

A photograph of Steve Jobs and Bill Gates sitting in red chairs, laughing. Steve Jobs is on the left, wearing a black turtleneck and blue jeans, holding a water bottle. Bill Gates is on the right, wearing a light blue striped shirt and dark pants. The background is a blue wall with a vertical black line.

Tech is famous for
its great rivalries,
and China is no
exception.

TECH RIVALRIES IN CHINA
THE KEY PLAYERS



FOUNDED BY
马云 (Jack Ma)
1999

COMPANY STATUS
NYSE: BABA
\$589bn
(June 8 2020)



CEO & FOUNDER
马化腾 (Pony Ma)
1998

COMPANY STATUS
OTCMKTS: TCEHY
\$541bn
(June 8, 2020)



CEO & FOUNDER
李彦宏 (Robin Li)
2000

COMPANY STATUS
NASDAQ: BIDU
\$39bn
(June 8, 2020)



CEO & FOUNDER
张一鸣 (Zhāngyī míng)
2012

COMPANY STATUS
Privately Held
\$~100bn
(May 20, 2020)

TECH RIVALRIES IN CHINA
BATTLE GROUNDS

 Category Leader



HOW THEY IMPACT BRANDS

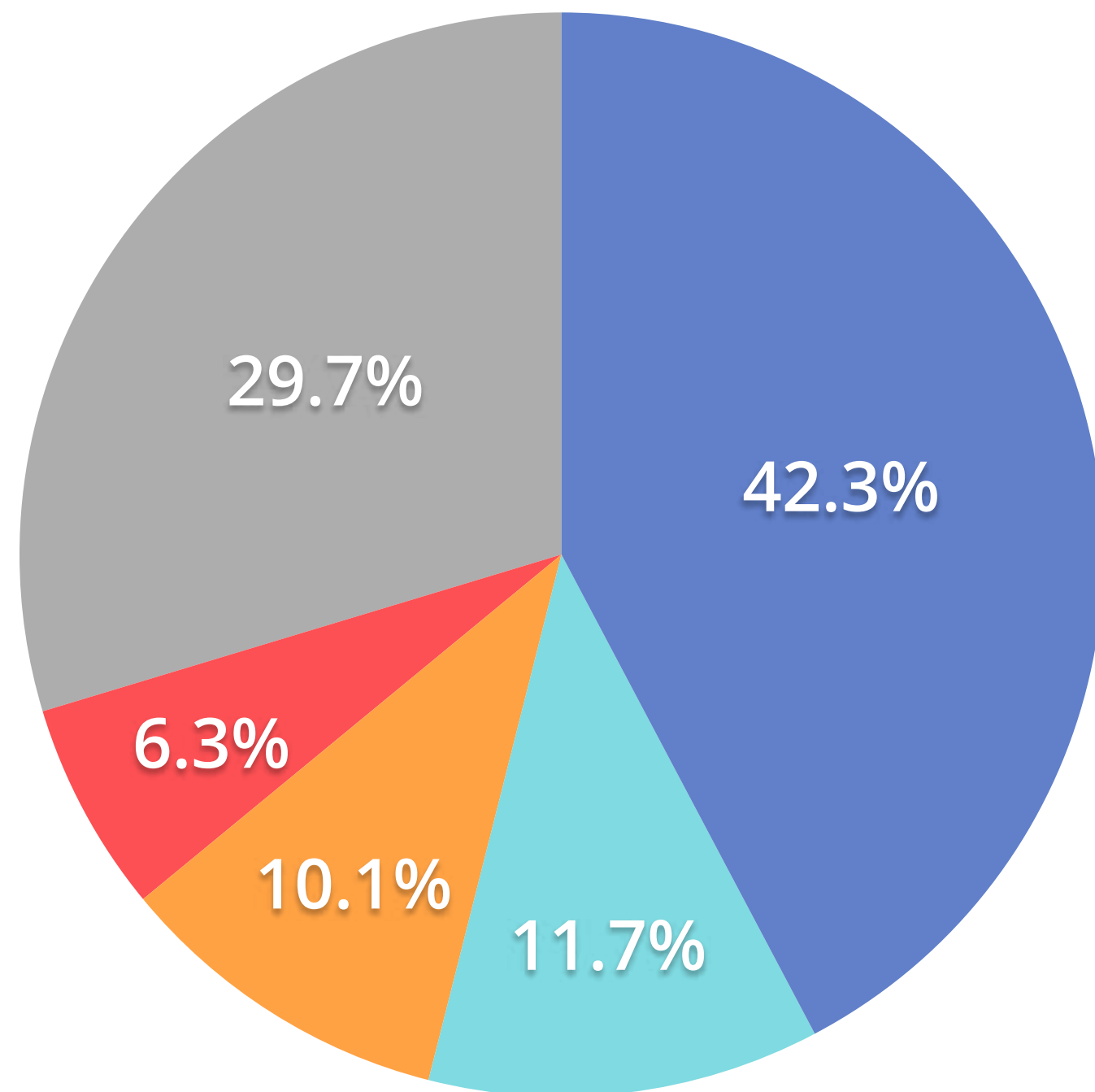
WeChat owned by Tencent does not allow links to Taobao or Tmall, e-commerce platforms owned by Alibaba to be opened directly inside WeChat. The user has to awkwardly copy and paste the link into a different browser on their phone.

Ever resourceful, to get around these limitations Taobao created a unique code name for each product, allowing users to simply copy the code in WeChat and then open the Taobao app to be taken straight to the product.



TECH RIVALRIES IN CHINA
ATTENTION

4 companies occupy 70% of Chinese Netizens' daily time using their phones.



EXPERT OPINION

"With all the injunctions, lawsuits, links-blocking, it will be interesting to watch how Bytedance' new move to grab more market share of China's digital advertising market and Chinese netizen's screen time."

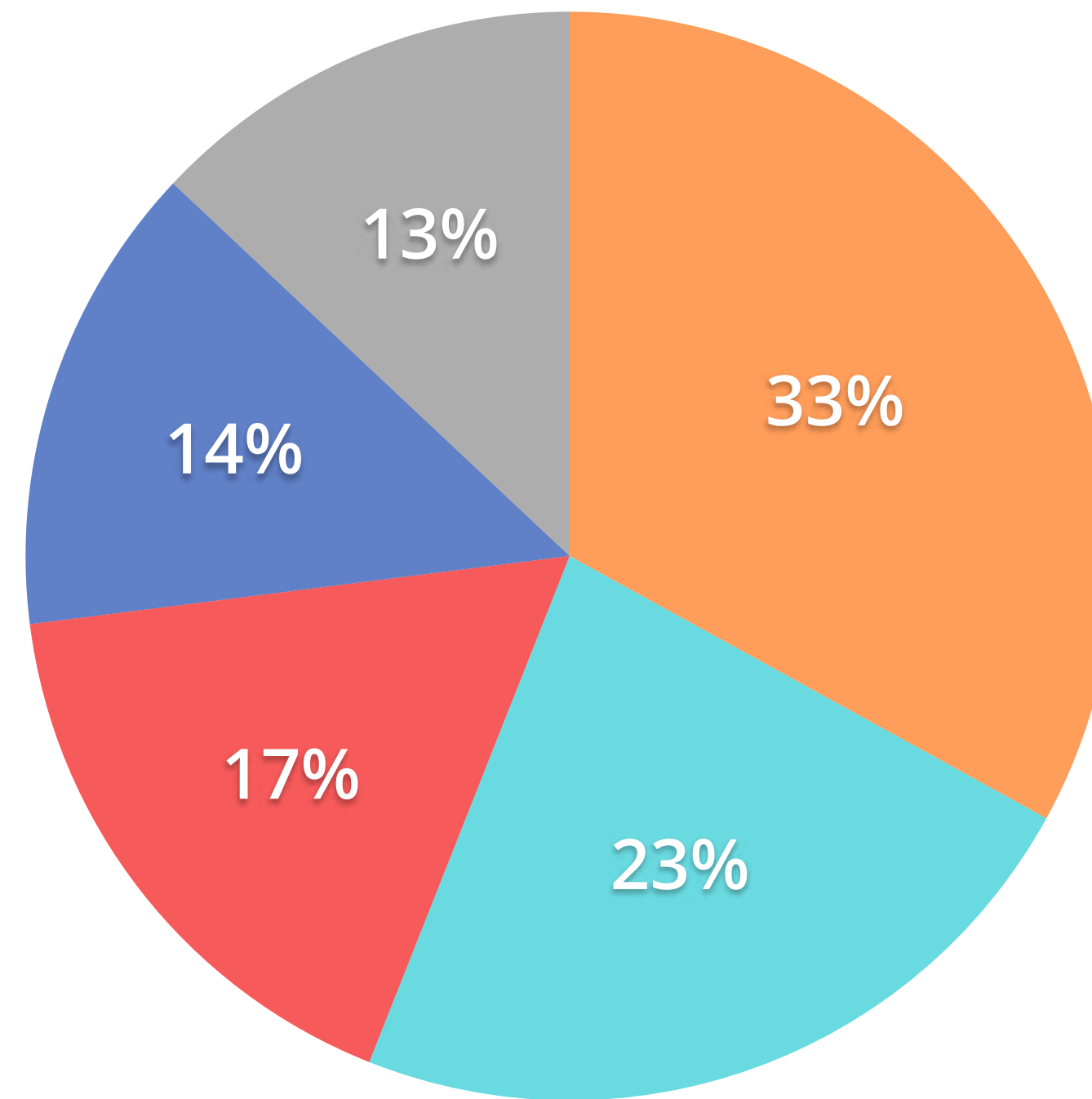


Steven Yan
Integrated Marketing Consultant
Founder of "Marketing China"
WeChat Community

SHARE OF DIGITAL AD REVENUE (RMB)

China's digital ad landscape is almost opposite to the West where Facebook & Google gather 80% of the online advertising revenue. In China the top player in digital advertising is an E-commerce platform more equivalent to Amazon.

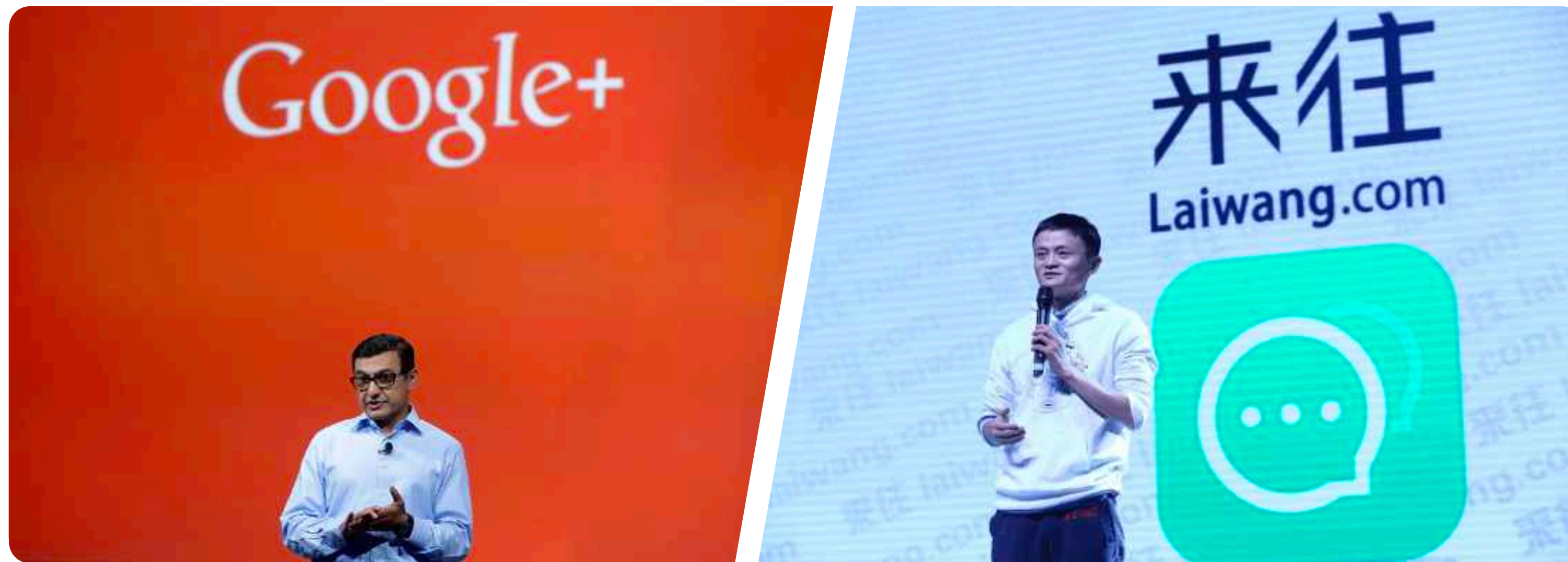
China's largest social media platform WeChat, owned by Tencent which sits in 4th place with a mere 14% of digital ad revenue.



KEY TAKEAWAY

WeChat is less reliant on digital ad revenue and so has forged a different business model and side stepped many of the ad and privacy concerns that have dogged Facebook.

LAIWANG: THE GOOGLE+ OF CHINA



“I consider those who fail to reach the 100 mark as automatically giving up their bonus”

— Jack Ma, CEO Alibaba

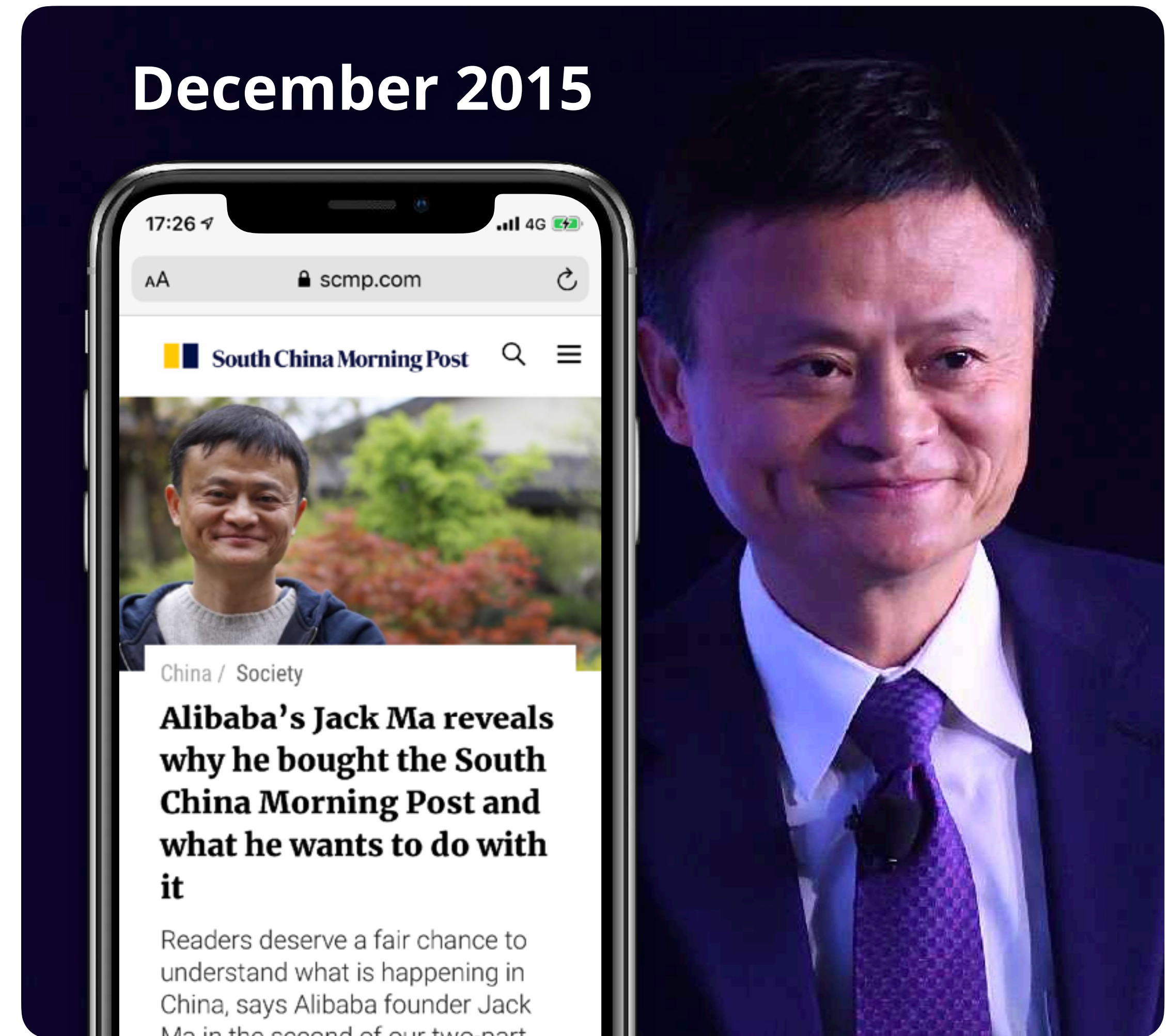
A WECHAT COMPETITOR?

Just like Google+ tried to compete with Facebook & Twitter, Alibaba created its own messaging app to compete with Tencent's WeChat. To promote its new app, Jack Ma shut down his WeChat account and demanded all Alibaba's employees to gather 100 external contacts on Laiwang before the end of the year to receive their annual bonus.

THE END OF LAIWANG

After a failed acquisition of the \$10B app Momo, and an investment in Tango, an American messaging app, Alibaba slowly abandoned its messaging app. They changed Laiwang's strategy and shifted from the messaging app industry.

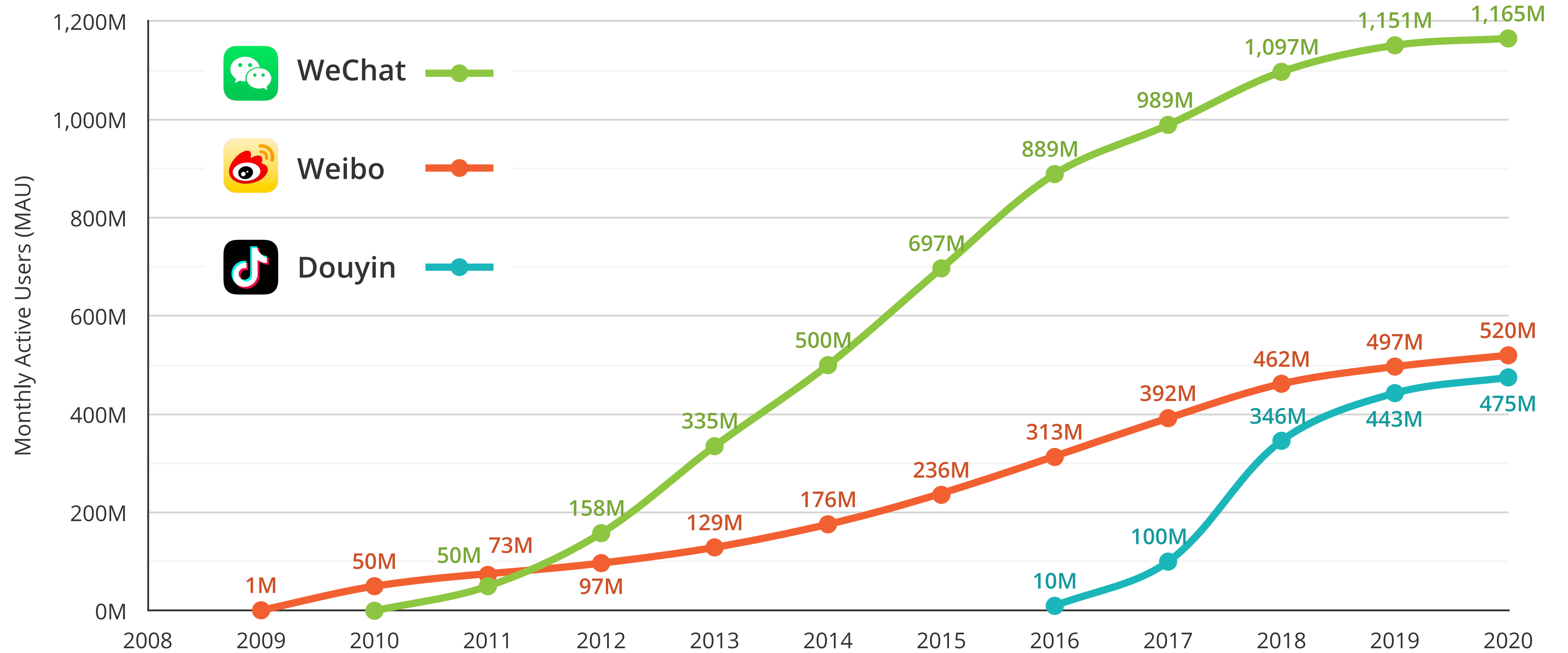
SOMETIMES THE SIMILARITIES ARE EERIE



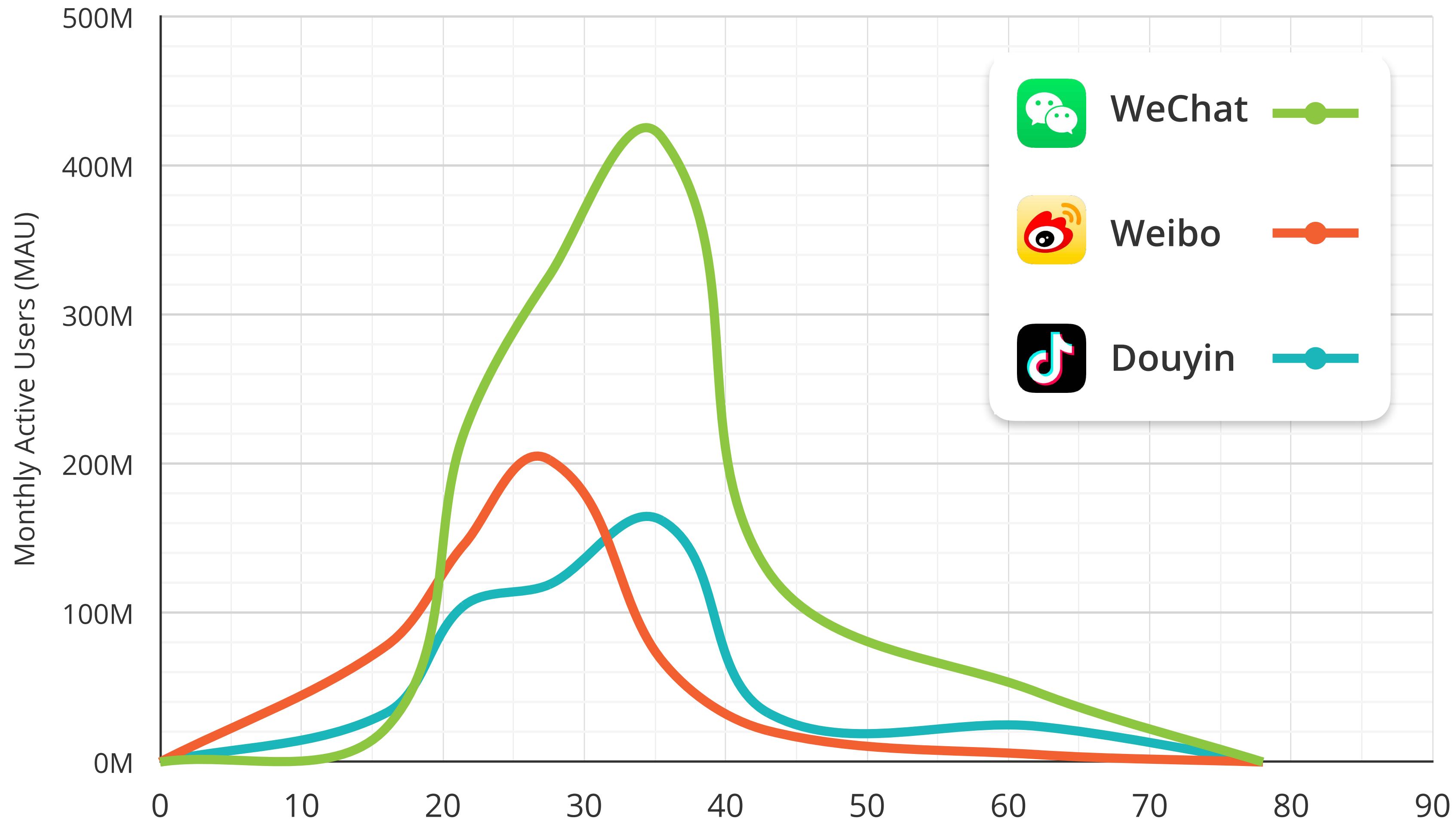
The Top Three Social Apps



MONTHLY ACTIVE USERS OVER TIME



MONTHLY ACTIVE USERS BY AGE GROUP



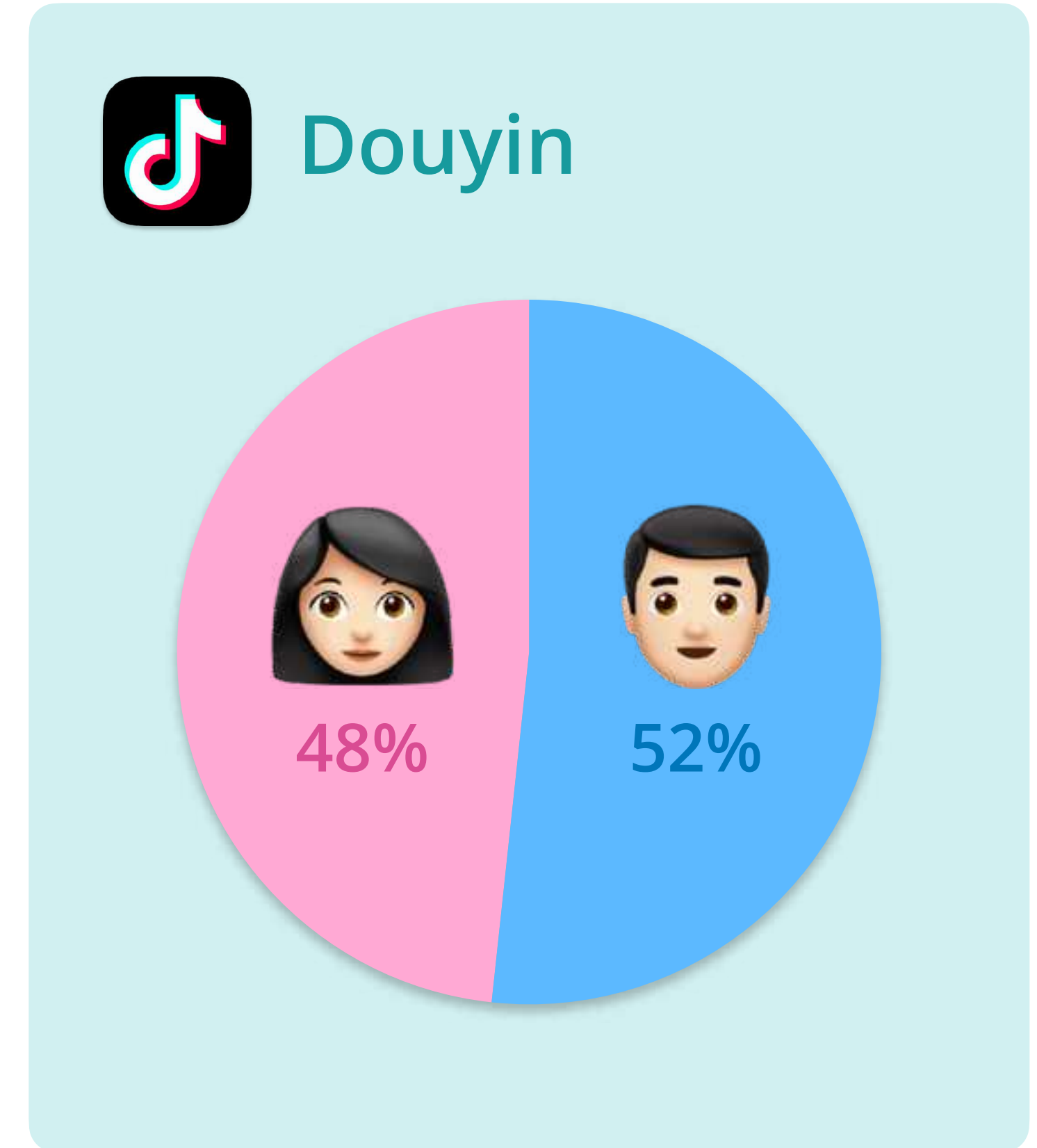
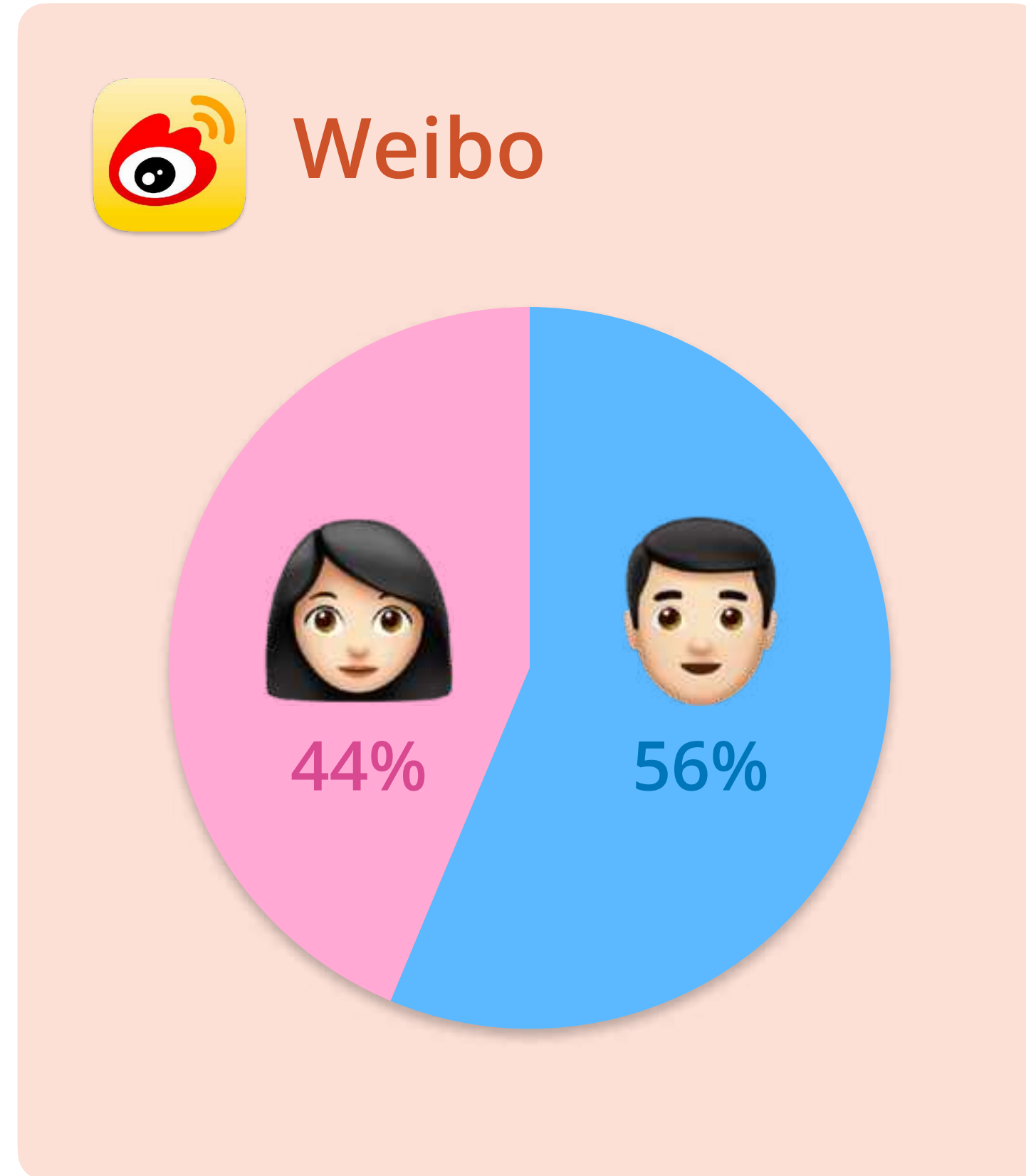
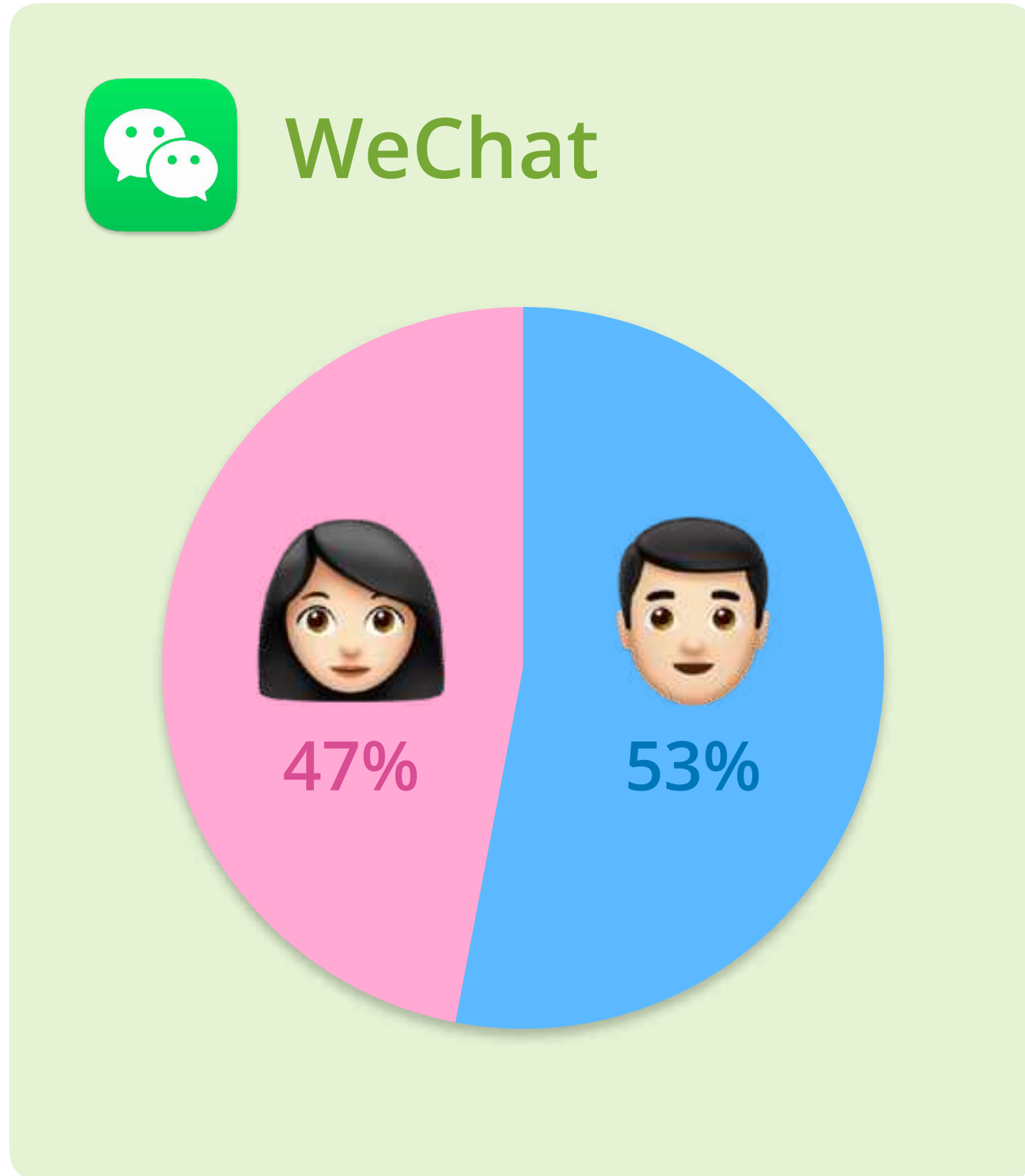
KEY TAKEAWAY

MAU ≠ People

In China, many users have multiple WeChat accounts, giving a number of MAU that is sometimes higher than the number of Chinese people online.

However we can still use this as an approximation to show that Weibo skews towards a younger demographic, meanwhile Douyin is more popular with 30 - 40. With over 1 billion MAU we can assume that WeChat is almost at saturation point.

THE TOP 3 SOCIAL APPS
USAGE BY GENDER



GARTNER'S HYPE CYCLE

We've tried to capture the general sentiment from marketers towards these three platforms:



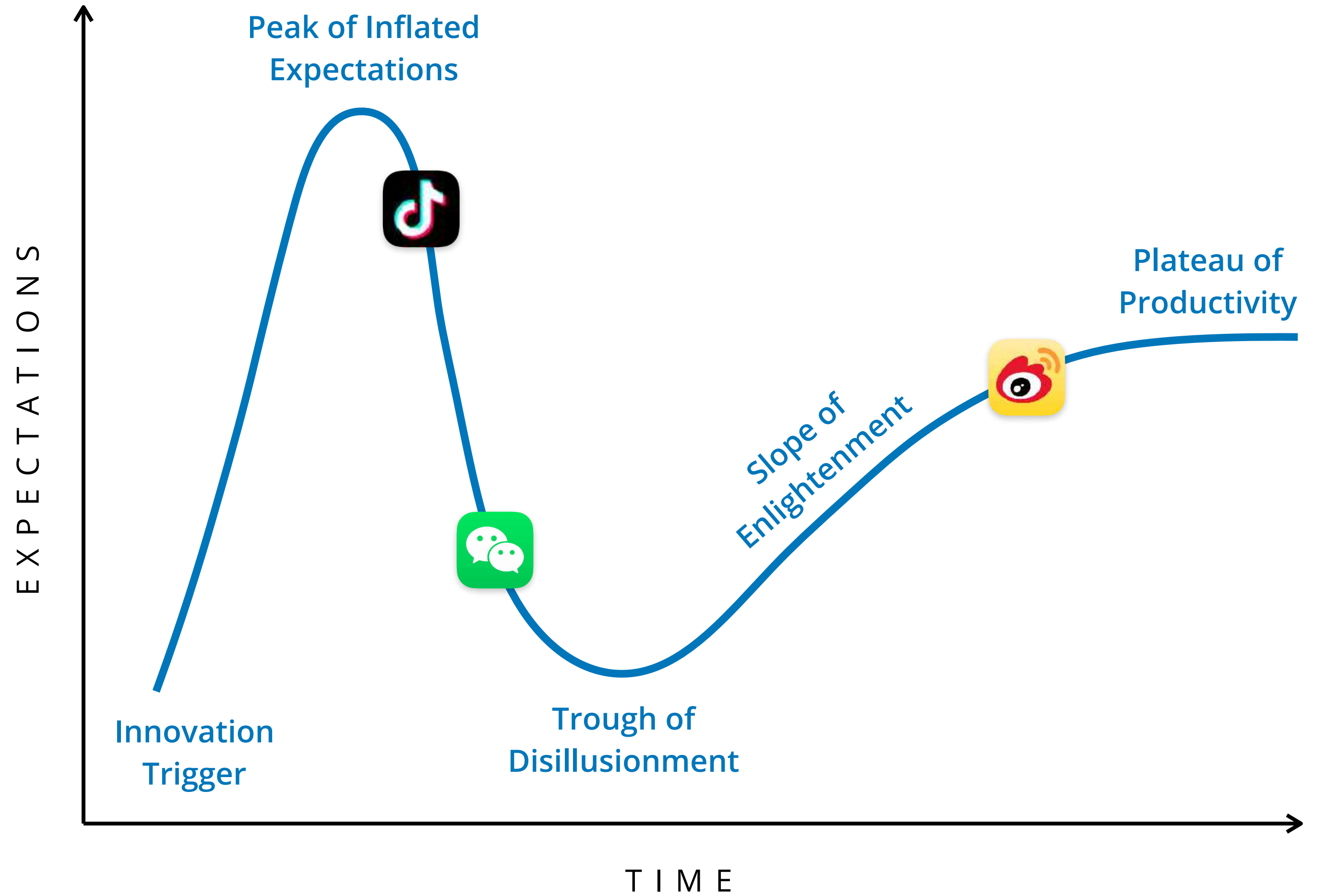
WeChat with over 20M company accounts now active, teams are becoming disillusioned by how hard it is to grow followers and the limited and expensive ad options. In response, WeChat are providing marketers new innovative ways to leverage its dominance in MAU.



Weibo has been through it's difficult period where everyone declared it "dead" and is now seen by marketers as a reliable place to build a brand presence, helped by it's mature self-service ad platform. However depending on the industry, Weibo may still not be the best place to drive direct conversions.



Douyin is the new kid on the block and is the focus of a lot of excitement as teams rush to open Douyin accounts. It's not suitable for all brands and success depends on creating hit content that gets boosted by the algorithm.





WeChat



WeChat

CHINESE NAME

微信

wēi xìn

Phonetic: way-shin

LAUNCHED

2011

OWNERSHIP

Tencent 腾讯

100%

SUMMARY

China's omnipotent all-in-one super app

KEY FEATURES

Messaging, Social Media and Mobile payments.

COMPARABLE TO



WhatsApp



Facebook



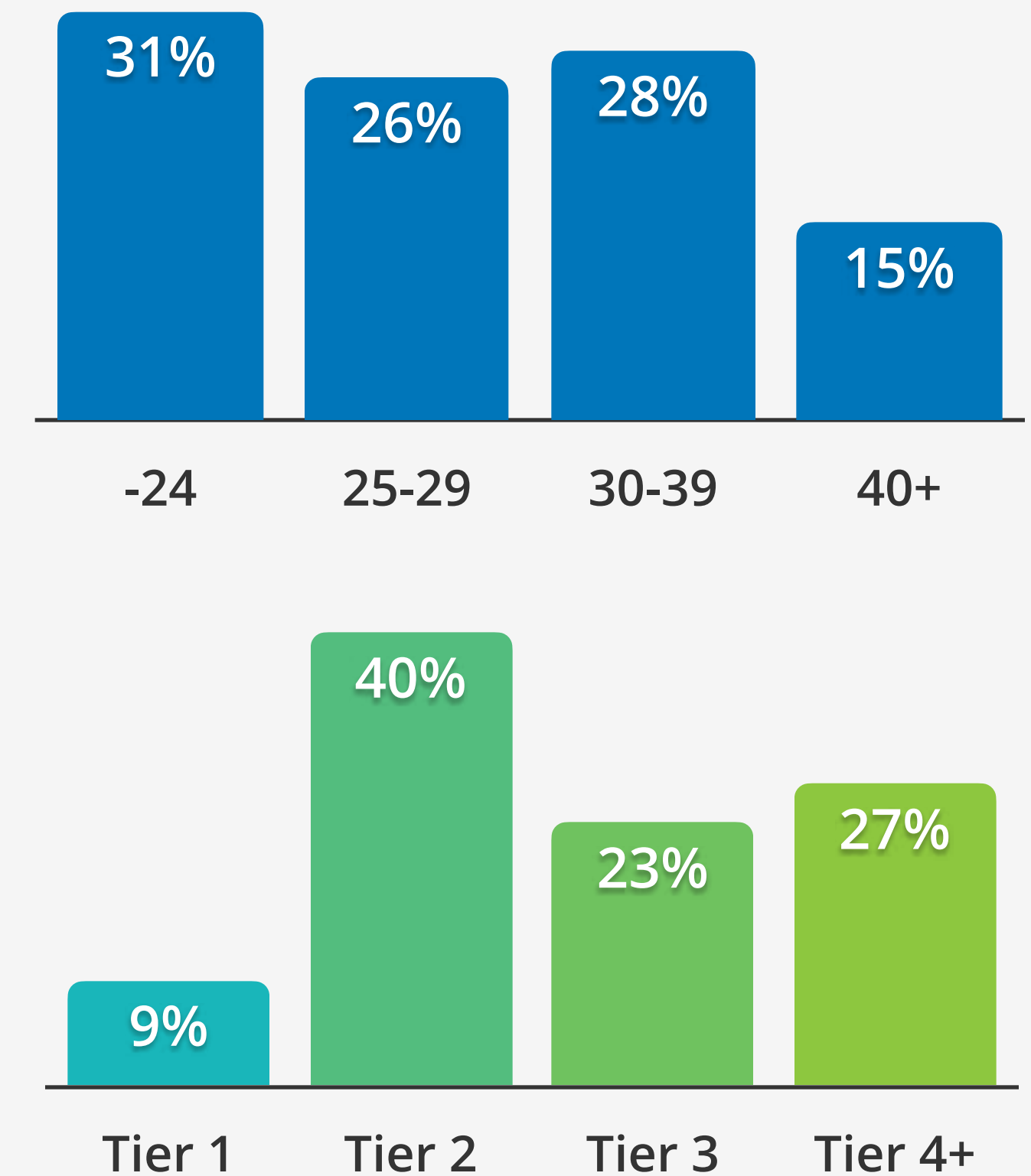
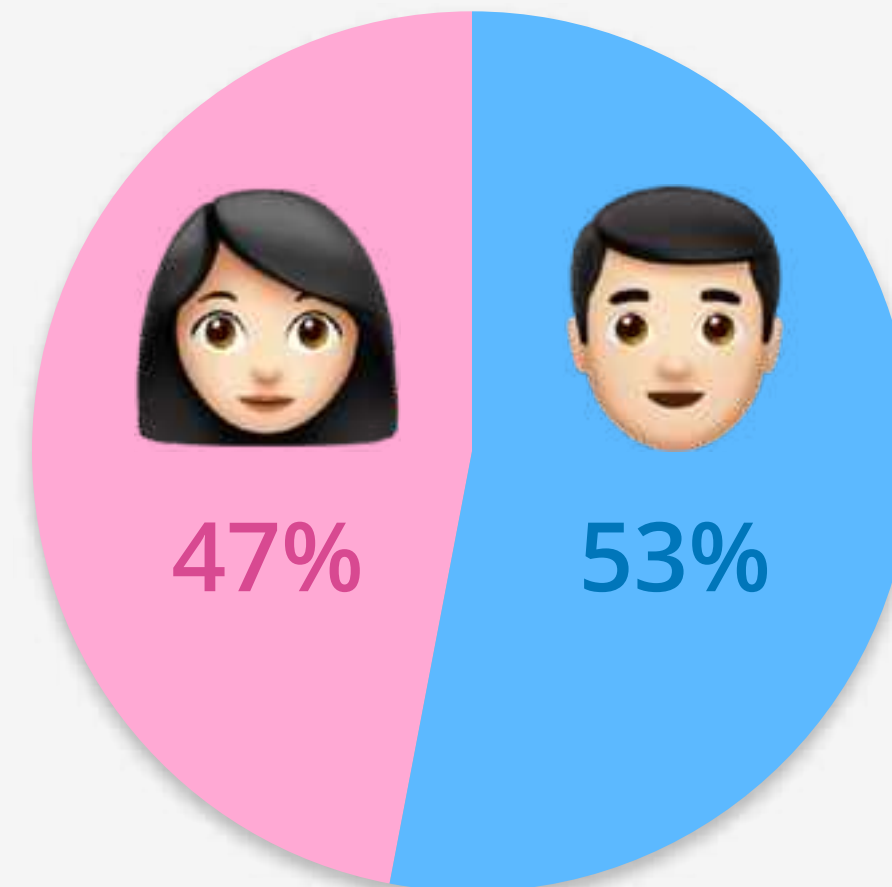
PayPal

MONTHLY ACTIVE USERS

1.165 billion

(Jan 2020)

DEMOGRAPHICS



THE SUPER APP TO RULE THEM ALL



China

Single Super App
to Solve Everything



America

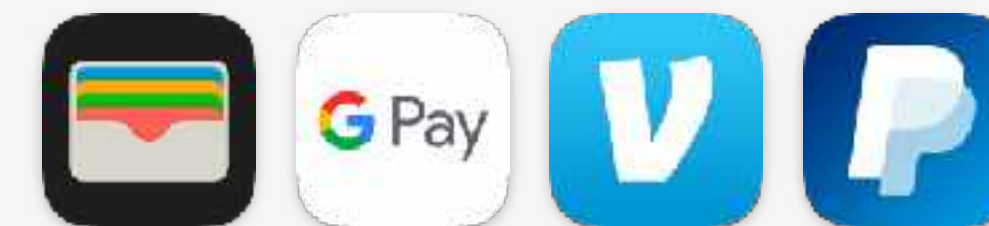
Messaging



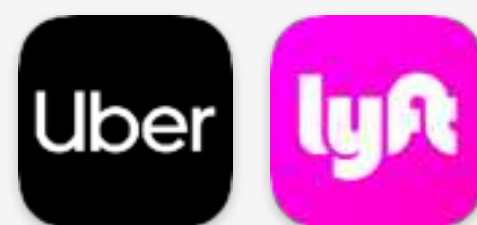
Social Networking



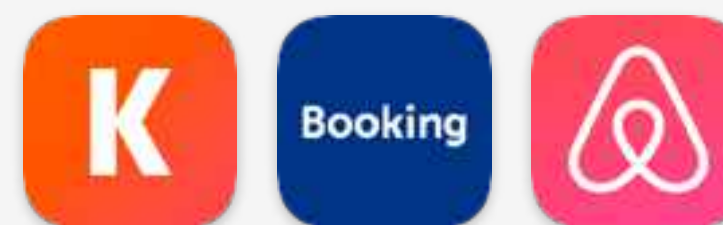
Mobile Payments



Ride Hailing



Travel



and so much more...





QUICK GLIMPSE

1 Chats

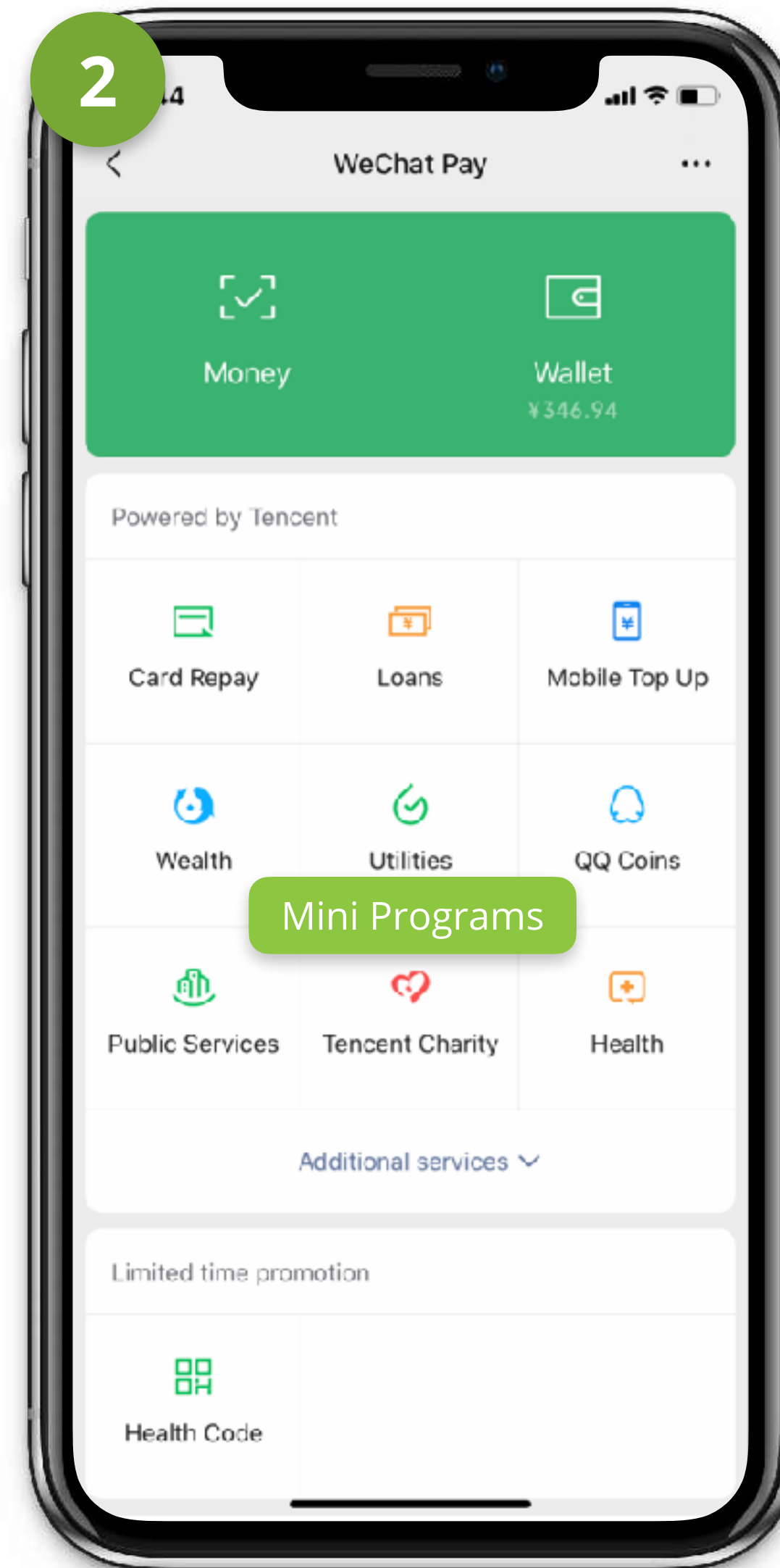
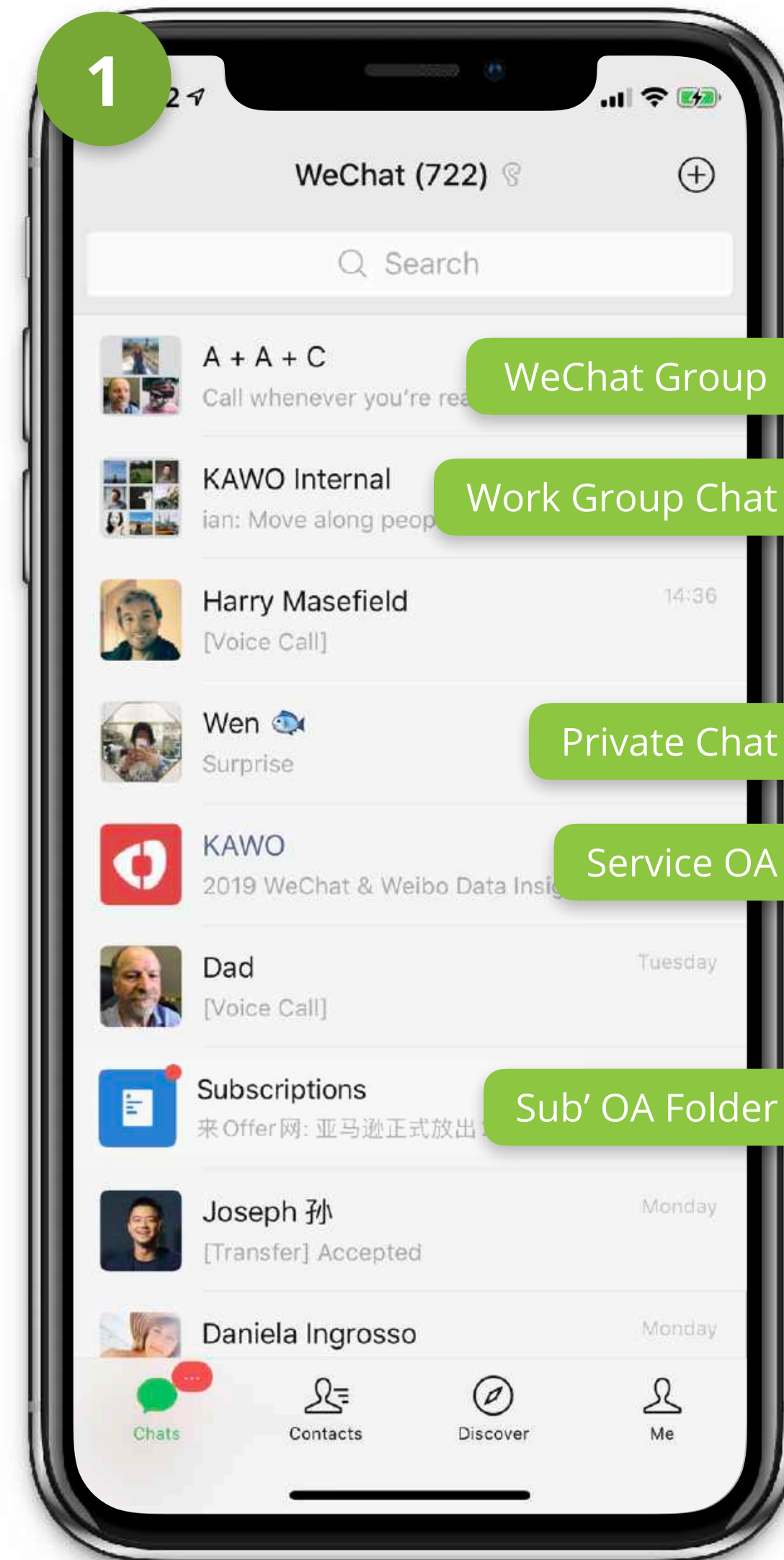
The main conversations screen with friends mixed in with personal and work group chats and official brand accounts.

2 WeChat Pay

Your WeChat Wallet. Users can see their balance, add payment methods and access a wide range of services.

3 Moments

A social feed similar to the Facebook timeline, but much more private only containing content shared by friends except for the occasional paid advert.



MIND BLOWING WECHAT STATS

Every day there are

45 Billion

messages sent on WeChat.

(of which 6.1 billion are audio messages)

Users in China spend

66 mins

on WeChat everyday.

(compared to 41 mins on Facebook)

WeChat is responsible for

34%

of the mobile internet traffic in China.

Every day users make

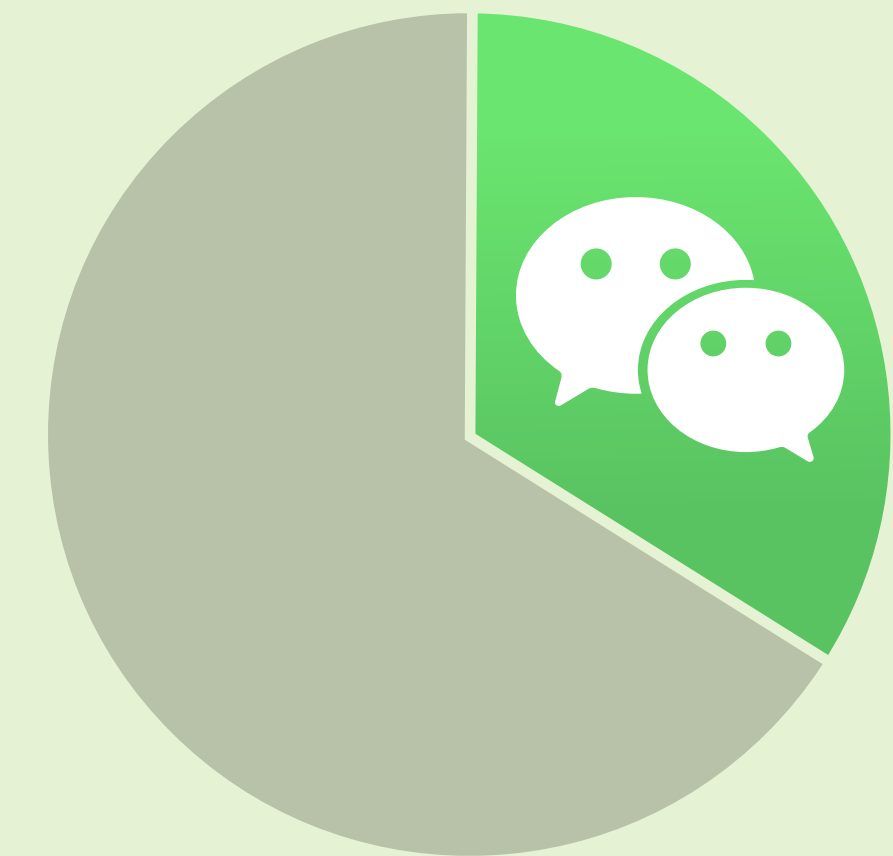
1.1 Billion

payment transactions on WeChat Mini programs.

WeChat is the

5th

most popular social app in the World, ranked by MAU.



THE POWER OF QR CODES

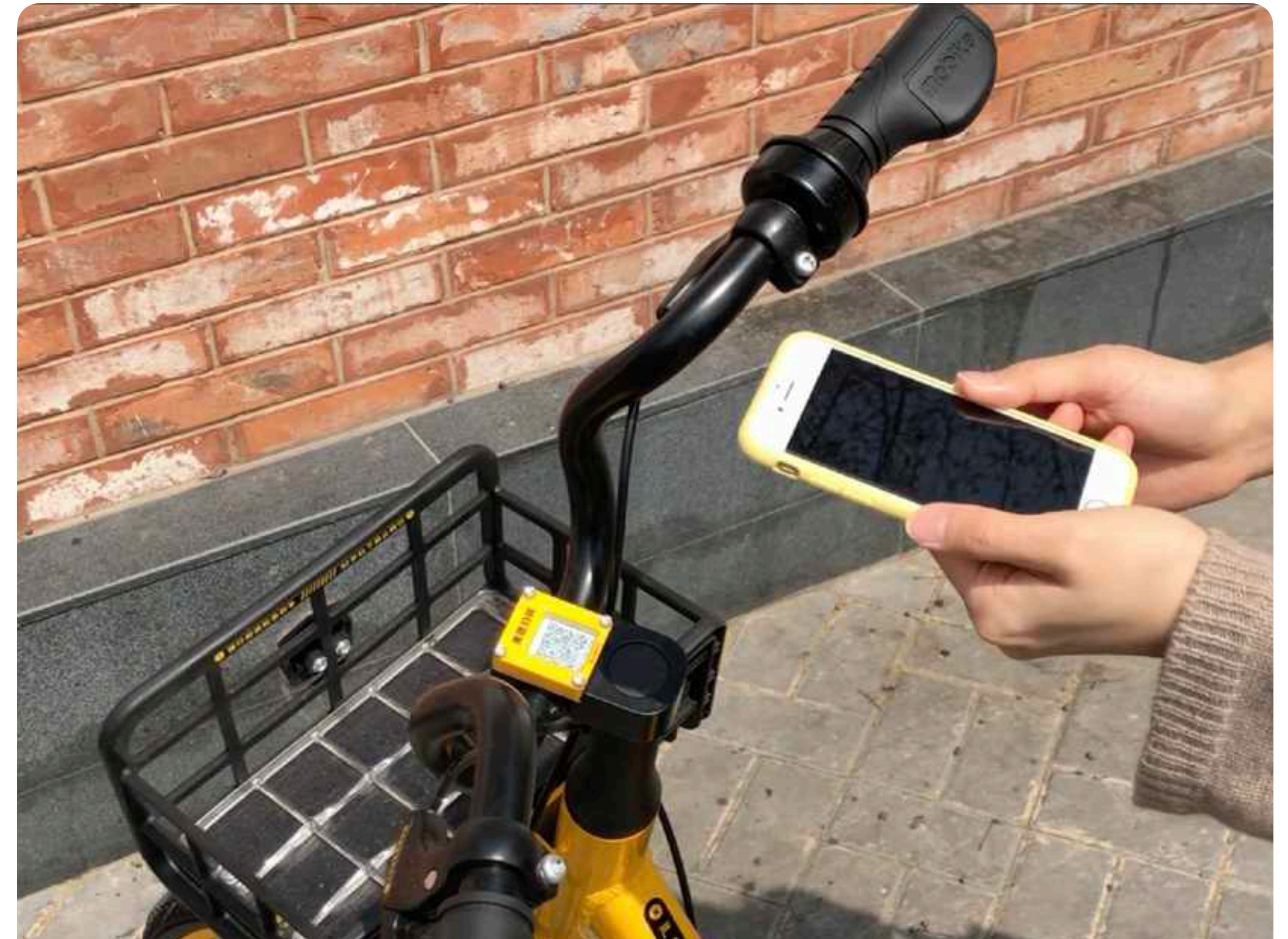
Much of the immense success of WeChat can be attributed to the simplicity & effectiveness of QR codes.

QR codes provide a very low cost, low tech way to connect the digital world inside our phones to things, people and places in the real world around us.



They are undeniably ugly, but this is also part of their power; they stand out and as soon as a user sees one they know instantly what to do.

In China QR codes are used for almost every task imaginable, from paying restaurant bills to registering for loyalty programs.



Example of a user scanning a QR code to unlock a hire bike. QR codes are everywhere in China.

IN CHINA QR CODES ARE EVERYWHERE



Pony Ma, CEO of Tencent scans his WeChat Pay QR code to access the metro in Shenzhen.



Even in a small vegetable shop local residents can pay by simply scanning the printed out QR code on the wall.



Knowing that nobody has cash anymore, local beggars use QR codes as a new way to ask for money.

QR CODES MAKE IT SO EASY TO ADD FRIENDS ON WECHAT



The pain of manually entering a new contact's details to become friends on WhatsApp.

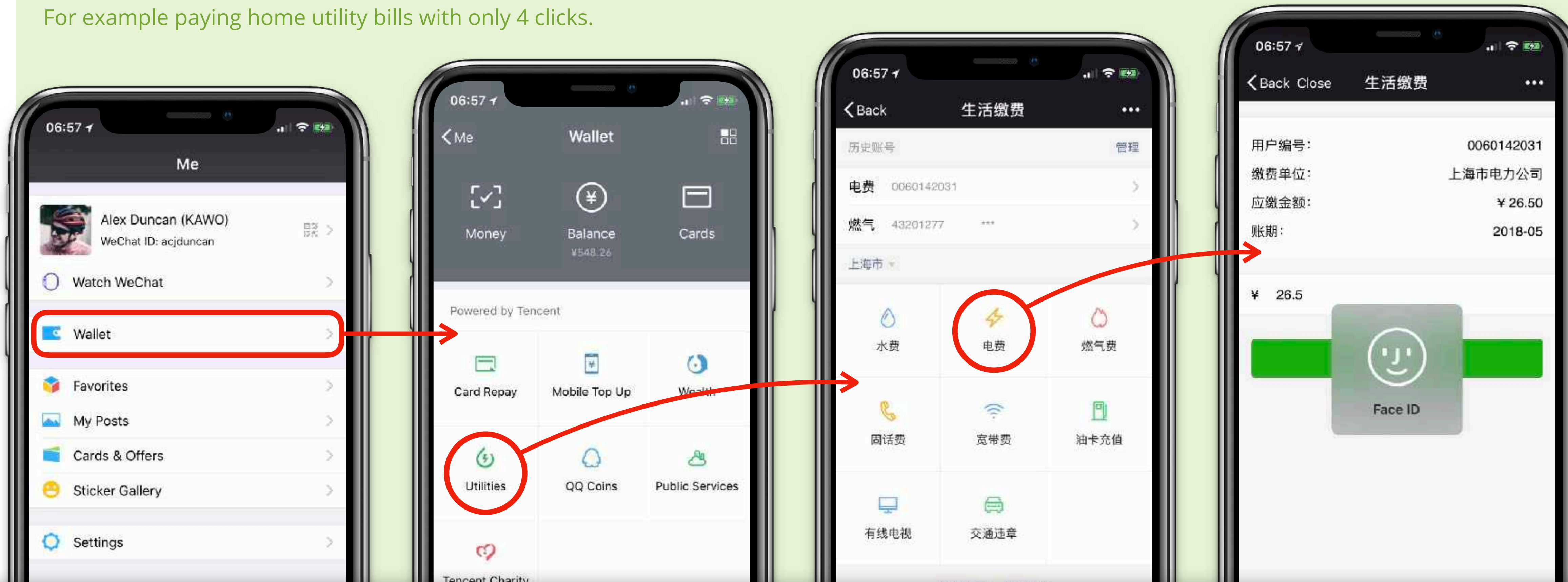
VS



Compared to the ease of adding a new friend on WeChat with a simple QR code scan.

PAYING UTILITY BILLS

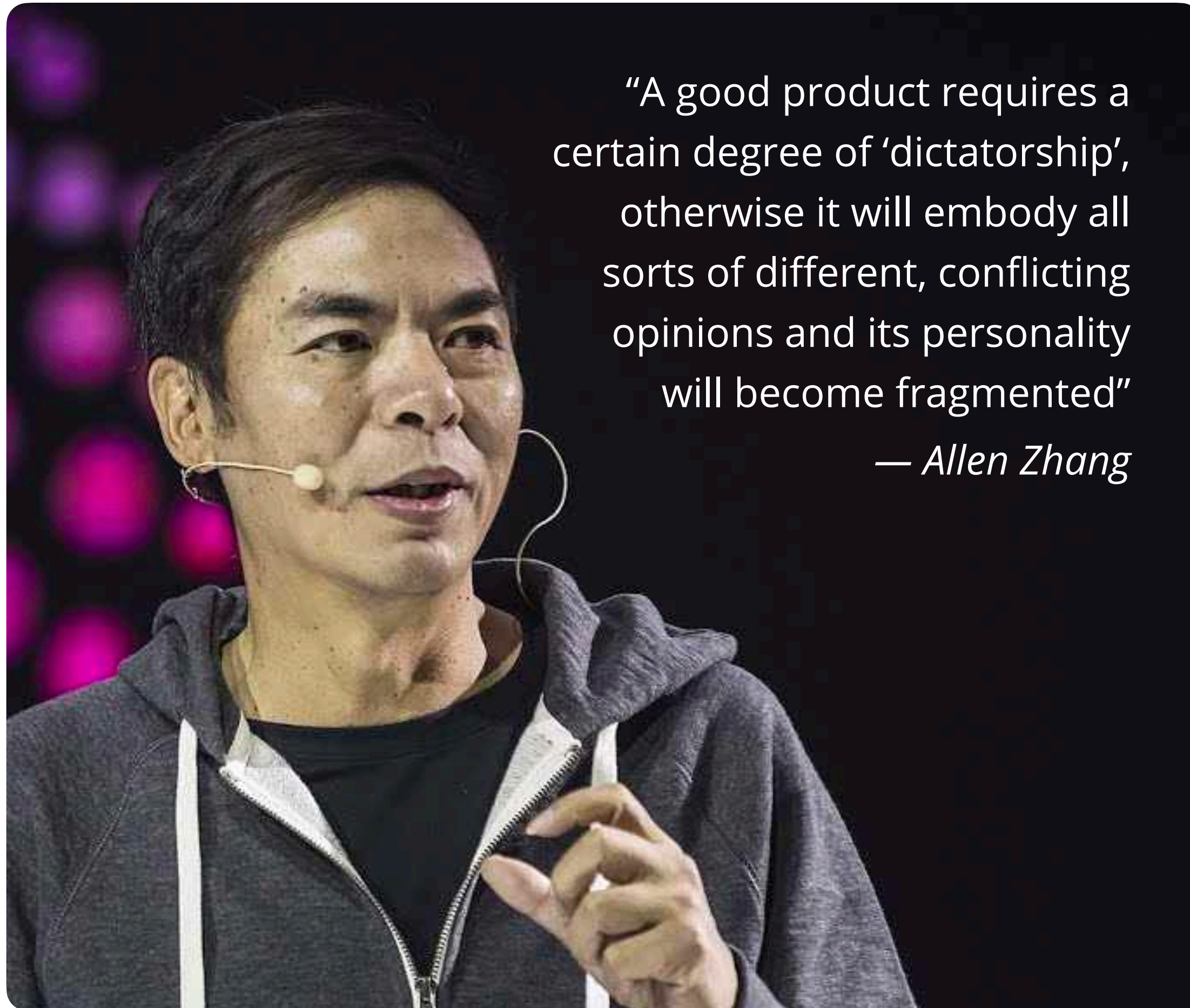
It's hard to overstate the convenience of WeChat in daily life.
For example paying home utility bills with only 4 clicks.





WECHAT

ALLEN ZHANG - THE VISIONARY BEHIND IT



“A good product requires a certain degree of ‘dictatorship’, otherwise it will embody all sorts of different, conflicting opinions and its personality will become fragmented”

— *Allen Zhang*

It's impossible to talk about the incredible success of WeChat and not mention Allen Zhang (张小龙 zhāng xiǎo lóng), the visionary who created it.

“I WANT TO BUILD THE BEST PRODUCT”

When creating WeChat in 2010, Zhang focused on creating the best product for customers needs. Not the one they wanted, but the one they needed. A customer oriented, instead of a traffic oriented app. He wanted it to be simple and user-friendly in its design. From its launch in 2011, WeChat started to grow naturally without any promotion. That's how Zhang knew he was on the right path.

THE SECOND INNOVATION

Zhang kept improving WeChat, carefully adding new features to make it more useful and relevant. In 2017, when WeChat was already embedded in the fabric of daily life in China, Allen and his team launched WeChat Mini Programs, yet again multiplying WeChat's reach.

In January 2019, his 8 years of work were rewarded when WeChat achieved the incredible milestone of 1 billion Daily Active Users.



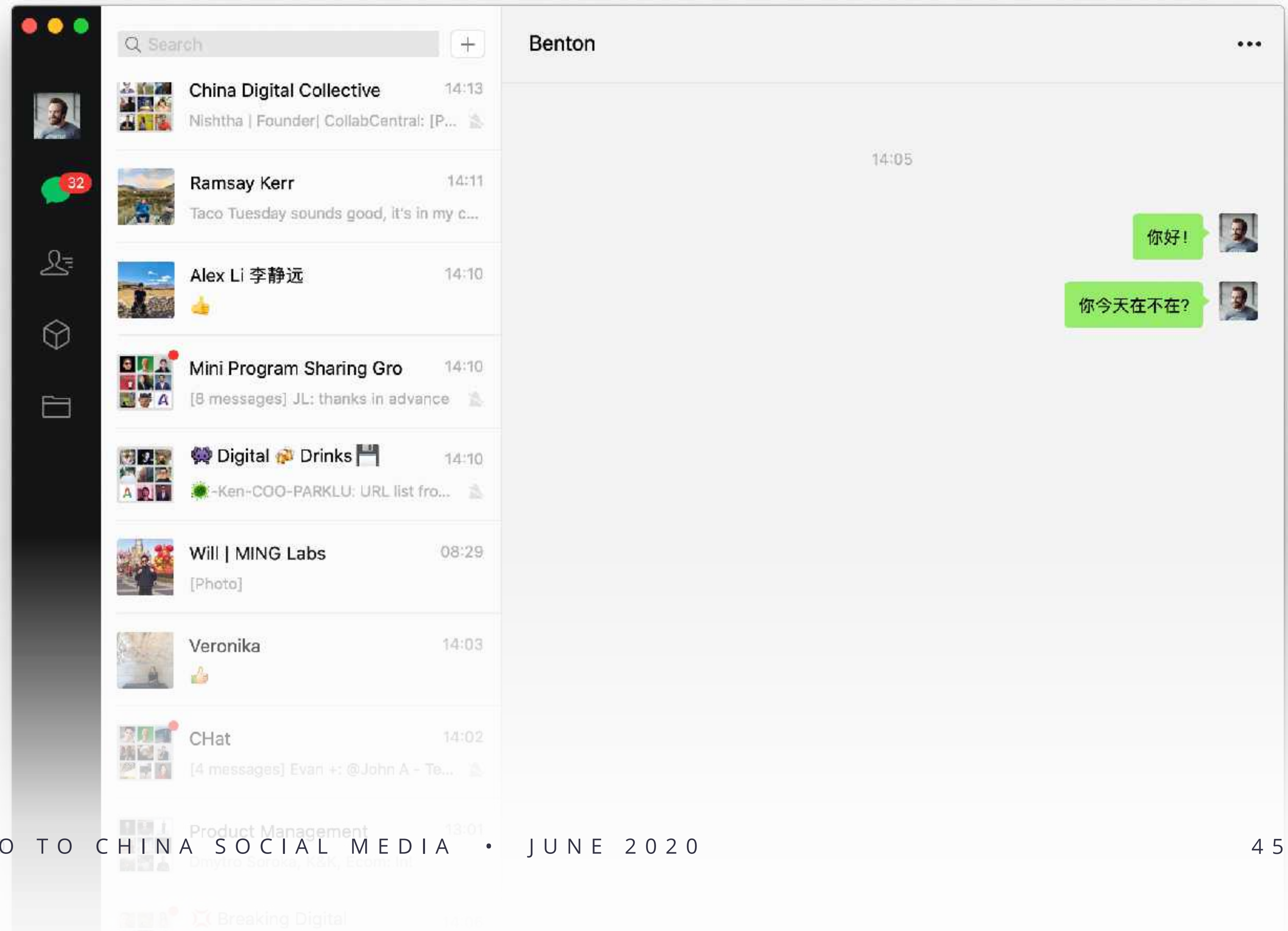
WECHAT DESKTOP APP

WeChat launched the desktop version for Mac and Windows in 2014 and 2015 to better serve more users and transfer files between desktop and mobile phones.

In order to get up and running with WeChat for PC, the user needs to scan a QR code from within the mobile app. Once the phone is linked to the computer, messages will be mirrored across both devices, but alerts will only show on the computer

Download the desktop version:

WeChat.com

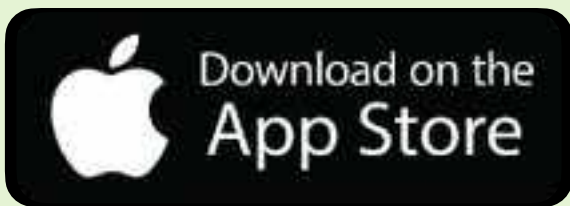




WECHAT

GET MORE FAMILIAR WITH WECHAT

ONE



Download & Install WeChat

Install WeChat on your phone and explore the functions available, such as Messaging, Moments, Top Stories and Discover.

TWO



Scan Friends' QR Codes to Add Them

Add some friends or colleagues to WeChat by scanning their QR codes.

THREE



Follow a WeChat Official Account

Follow KAWO's WeChat Service account to see what a typical company account looks like.

FOUR



Open a WeChat Mini Program

Scan to access this popular game in a WeChat mini program. Notice how effortlessly it loads compared to installing a native app.

Opportunities for Brands on WeChat



SIX OPPORTUNITIES FOR BRANDS ON WECHAT

ONE



WeChat
Official Accounts

TWO



WeChat
Mini Programs

THREE



WeChat
Pay

FOUR



WeChat
Advertising

FIVE



WeChat
Work



SIX
WeChat Social CRM



ONE

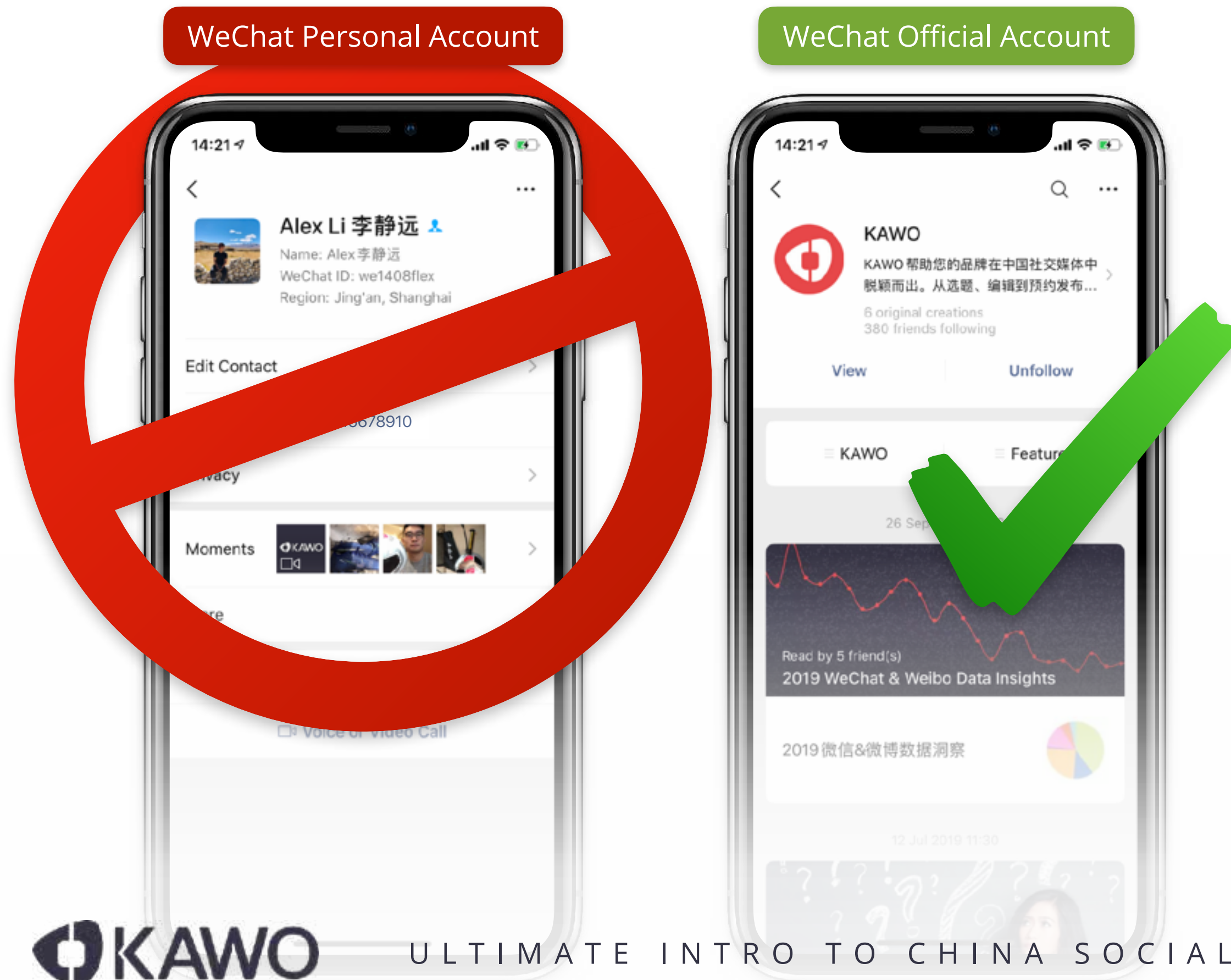
WeChat Official Accounts

微信公众号

wēi xìn gōng zhòng hào

WECHAT PERSONAL ACCOUNTS ARE NOT FOR COMPANIES

You've probably already got the sense that WeChat cares a lot about the experience of their users. Which is likely why in 2013 they introduced WeChat Official Accounts for companies.



Private Traffic

WeChat Official Accounts are quite restrictive in how frequently they are allowed to message their followers, whereas WeChat groups can have up to 500 members and have almost no restrictions on how often you can send messages.

Because of this, many brands are setting up group chats full of key opinion leaders or their most loyal followers. Some of their employees act as moderators or community managers frequently posting content and engaging with their fans.

None of this activity can be officially automated and WeChat doesn't provide any tools to help with this. Furthermore, WeChat has recently made moves to curb this type of practice by companies. This includes blocking the third party tool, "WeTool" which helped brands manage group chats in various ways.

TWO TYPES OF WECHAT OFFICIAL ACCOUNTS (OA)

WeChat Official Accounts (also known as “OA”) provide brands with a way to build a following inside WeChat’s walled garden.

There are 20 million WeChat OAs and 80% of WeChat users follow at least 1 OA. 40% of all WeChat users spend more than 30 minutes per day reading articles from OA. These percentages are higher in Tier 1 cities than the rest of China.

TOUGH COMPETITION

According to research by QuestMobile, out of the 20 million OAs, 73% of WeChat users only follow up to 20 OAs.

41% of users follow OAs based on friend recommendations. Being part of these 20 accounts can therefore be very competitive.



Subscription

订阅号 (dìngyuè hào)

MAIN PURPOSE

Regular sharing of information.
e.g. News, Sports updates etc

KEY FEATURES

- Can push once per day with up to 8 articles in each push.
- Only top 2 articles visible in feed.
- Lower commitment from users.



Service

服务号 (fúwù hào)

MAIN PURPOSE

Customer service, e-commerce
& higher touch services.

KEY FEATURES

- Each user can receive four pushes per month and up to 8 articles in each push.
- Can send personalized content with the help of CRMs.
- More intrusive to user’s WeChat account.

SUBSCRIPTION ACCOUNTS

1 Subscriptions Folder

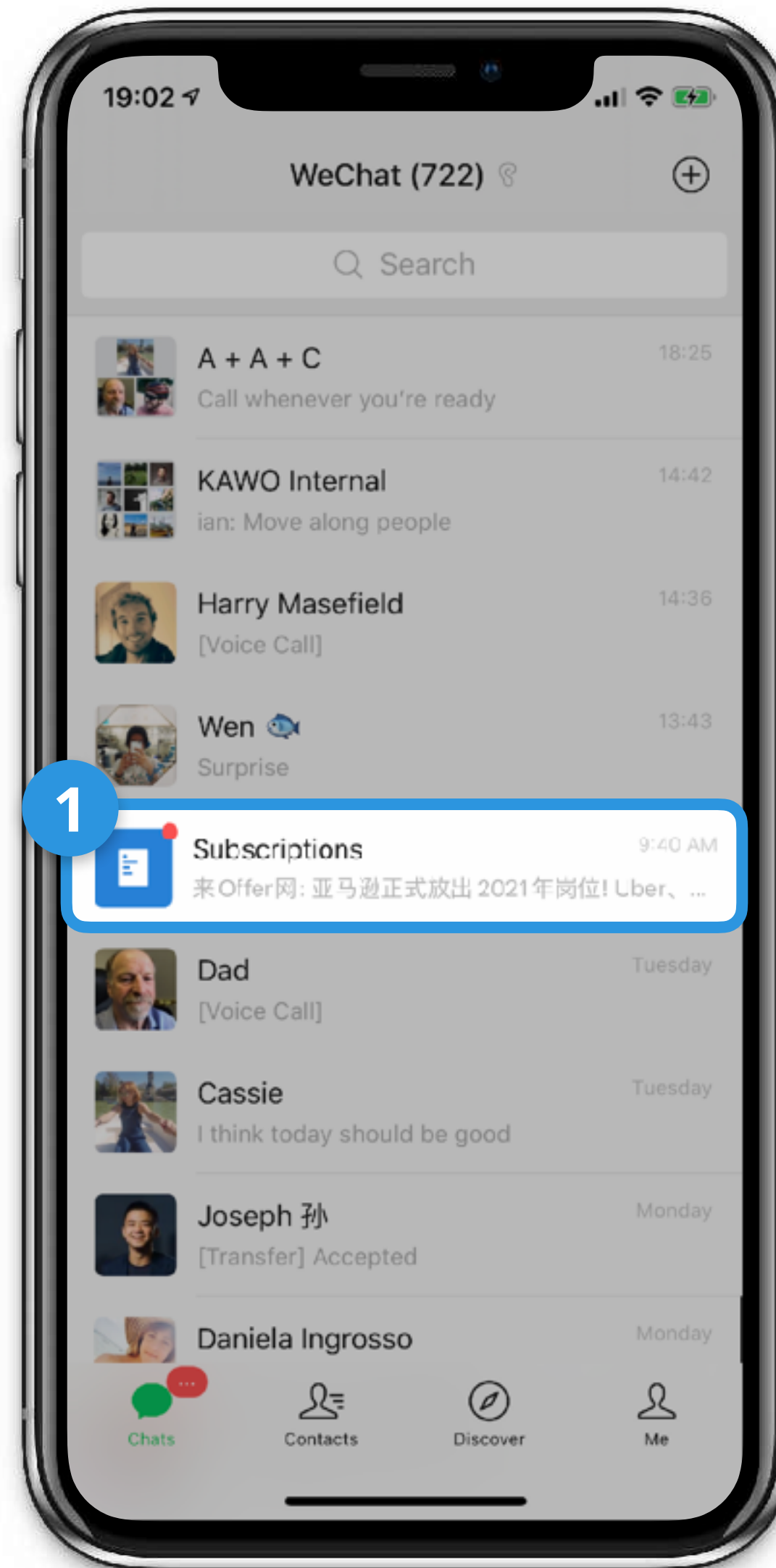
All posts from **Subscription OAs** that a user follows can be found in a blue folder in the “Chats” tab.

2 Subscriptions Feed

Opening this folder the user is presented with a list of accounts they frequently read and underneath a feed of content published by accounts they follow.

Originally in chronological order, as of May 2020 WeChat switched this feed to be ordered algorithmically.

Although Subscription OAs are able to include 8 articles in each push, **only the top 2 articles are visible** and the user must click to reveal the rest.





SERVICE ACCOUNTS

1 Appear Directly in Chats Feed

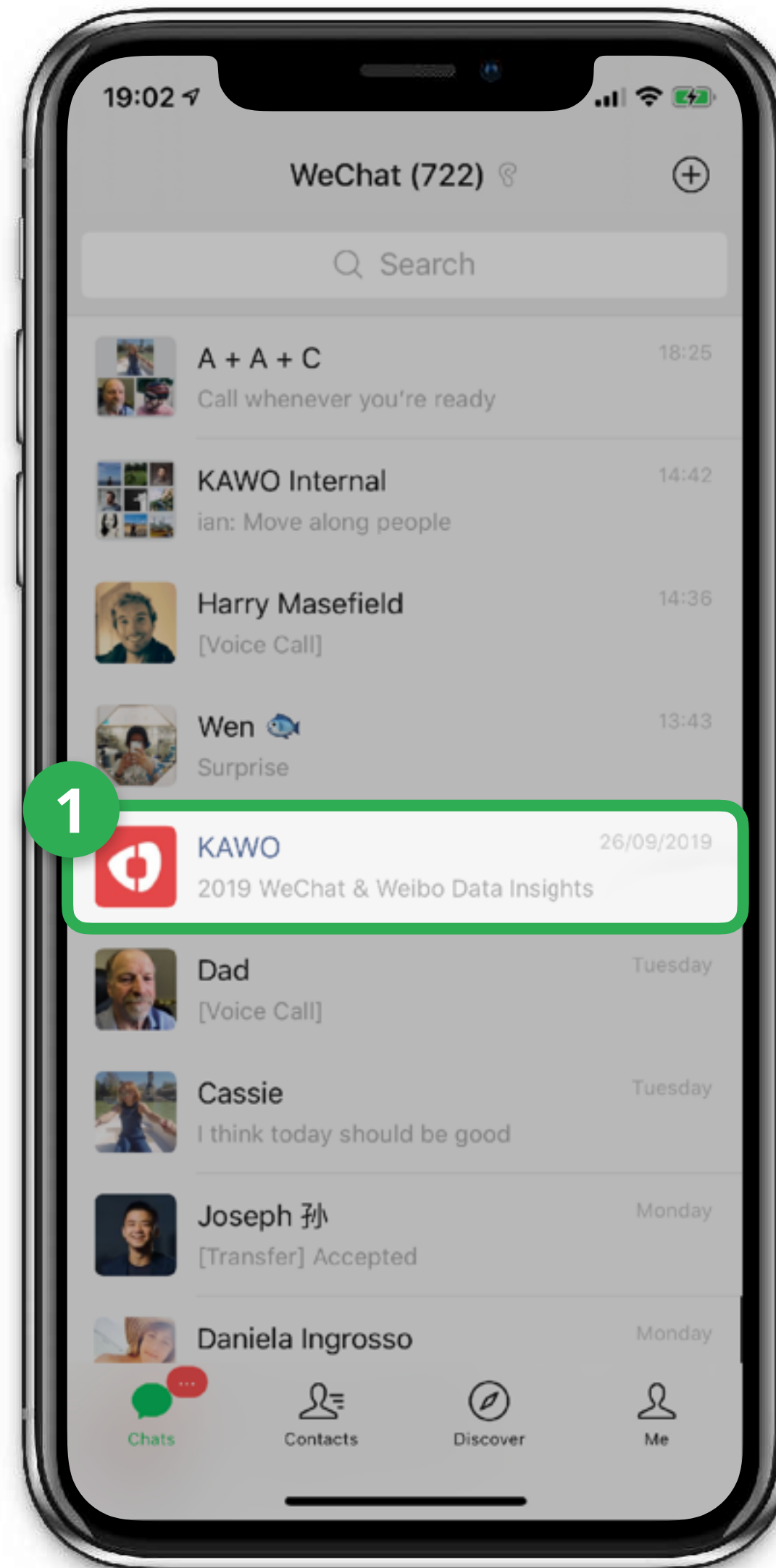
Service Accounts live in a users' main "Chats" feed, among their friends and group chats. This makes them much more prominent than **Subscription Accounts**.

2 One push with 3 articles

When you 'push' to your followers they receive a card inside the chat-like interface of your OA. This is also where messages can be sent.

3 Official Account Menu

A menu bar at the bottom allows your WeChat OA to behave similarly to a website. From here you can link to articles, Mini Programs etc.



WECHAT ARTICLES

1 1 Push with 2 Articles

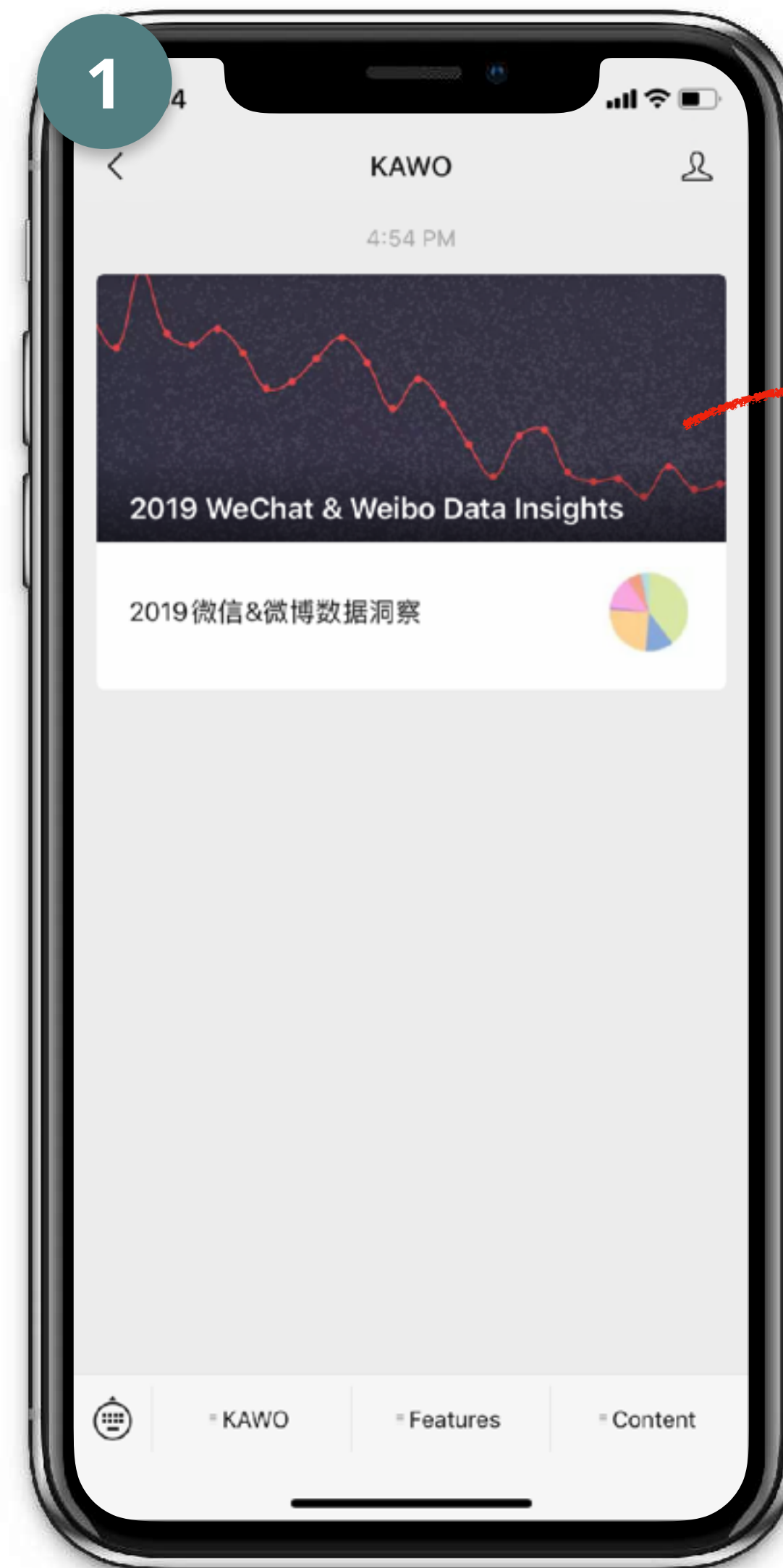
The user receives a push from your OA as a card. Clicking on each item in the card opens an article. Articles contain HTML similar to mini-web pages, but with many restrictions imposed by WeChat.

2 Simple Article

Articles can be very simple, displaying text & images with basic formatting.

3 Fancier Layout

But some brands really take the design of their articles to the next level, like this example from Nike.



MUST READ GUIDE

Ultimate Guide for WeChat Articles

We teamed up with 31Ten to write the most comprehensive guide to content marketing on WeChat.

kawo.com/ultimate-guide



VERIFYING YOUR WECHAT OFFICIAL ACCOUNT

As a brand it is important to get verified on WeChat. The little yellow tick lets users know this is the official brand account and its content is legitimate. However, WeChat's verification process is rather complicated.

BUSINESS LICENSE MATTERS

Brands can get verified on WeChat with either a mainland Chinese business license or with an overseas business license, but the process and results vary.

Unlike Mainland accounts, overseas accounts can only create Service Accounts. Subscription accounts can only be verified with Chinese Business license. It is possible to use a third-party agent to set up the account to circumvent this problem.

Mainland Verified

VERIFICATION

Takes about 1 week and costs 300RMB/year.

KEY FEATURES

Access to the full range of options offered by WeChat (WeChat store, payments, coupons, mini programs, copyright protection, IoT, etc.)

Overseas Verified

VERIFICATION

Takes about 3 months and costs 99USD/year.

KEY FEATURES

Only Service Account available with limited functionality. Some features available include chatbots, customer service and WeChat advertising.

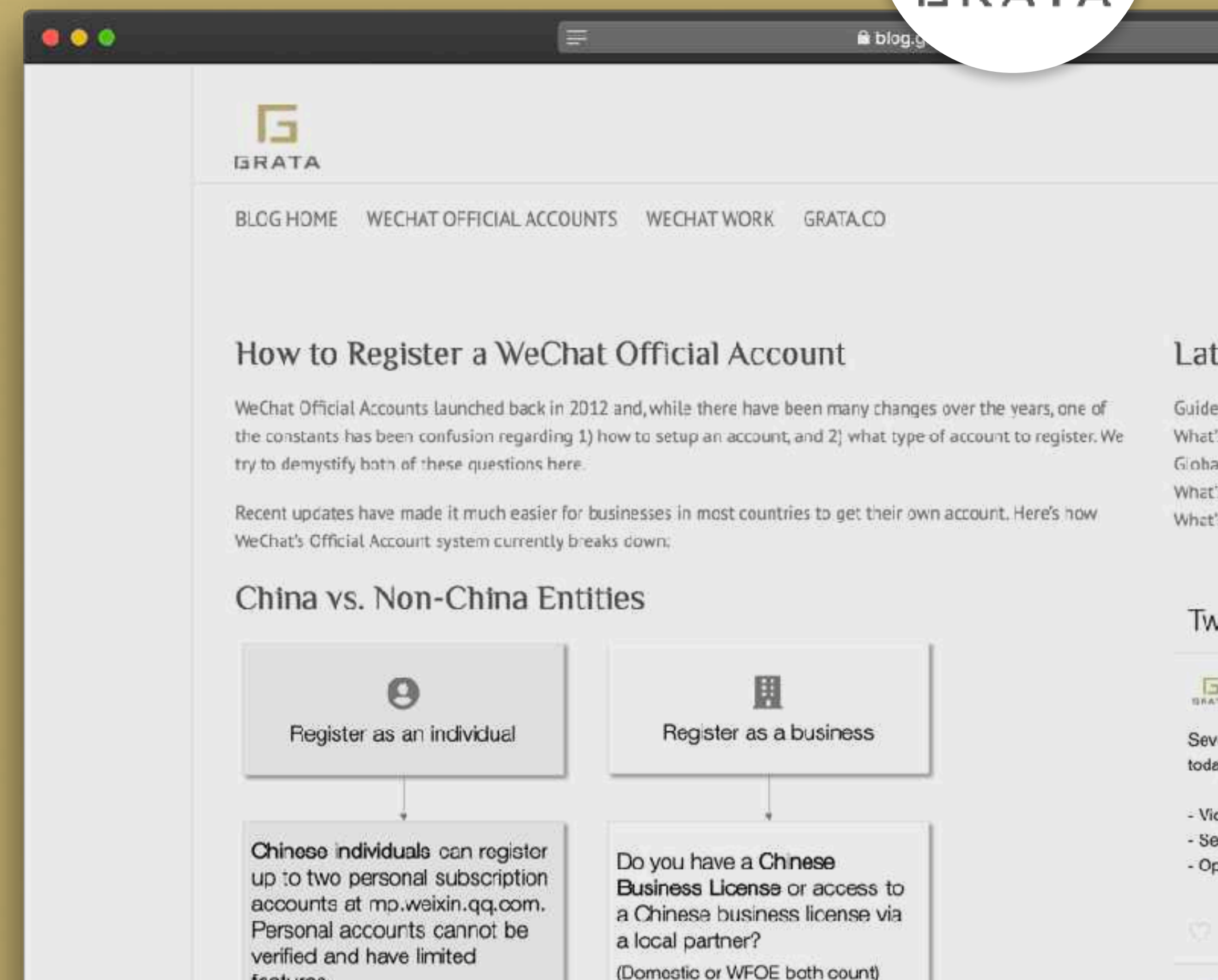


MUST READ GUIDE

How to Register a WeChat Official Account

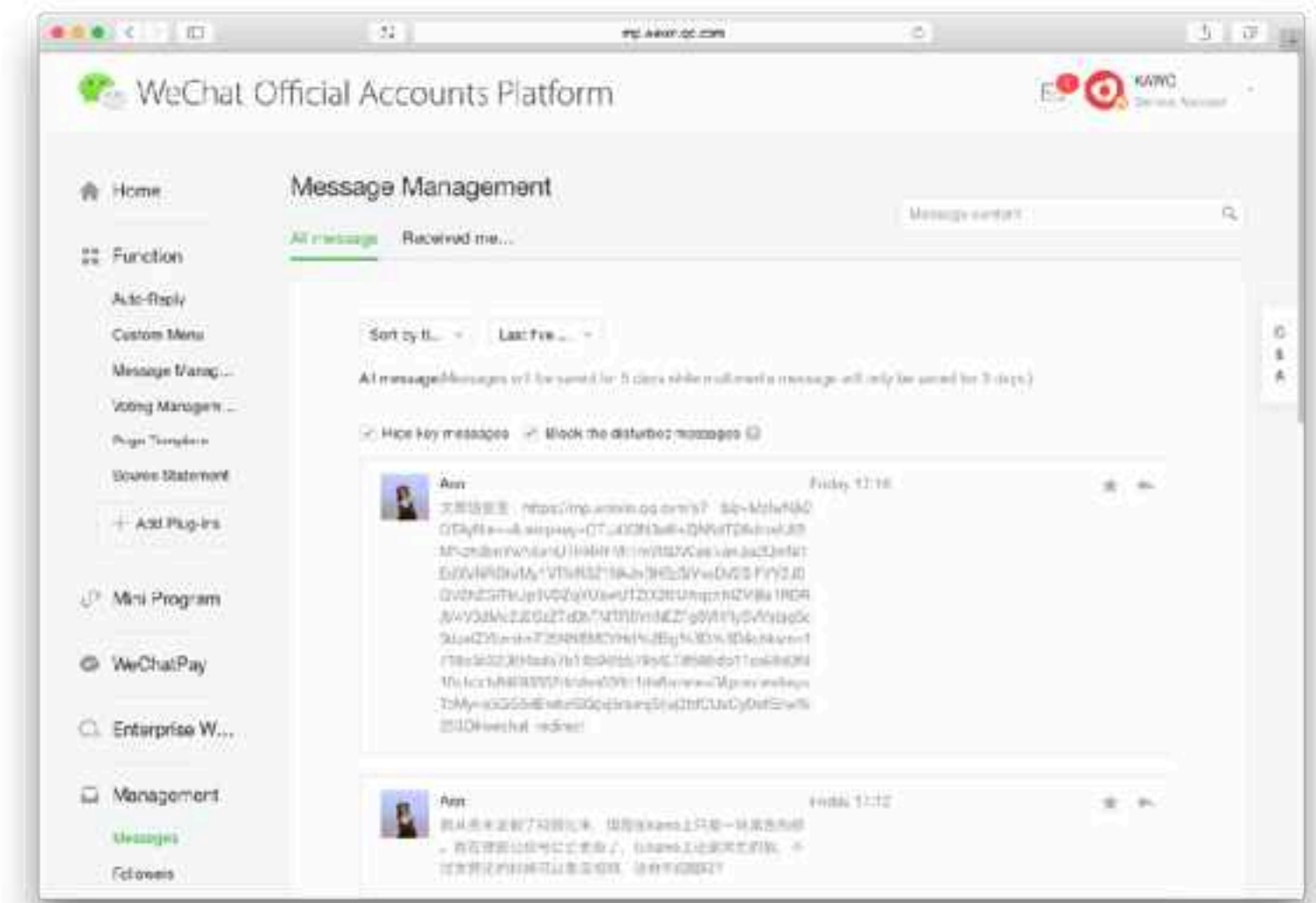
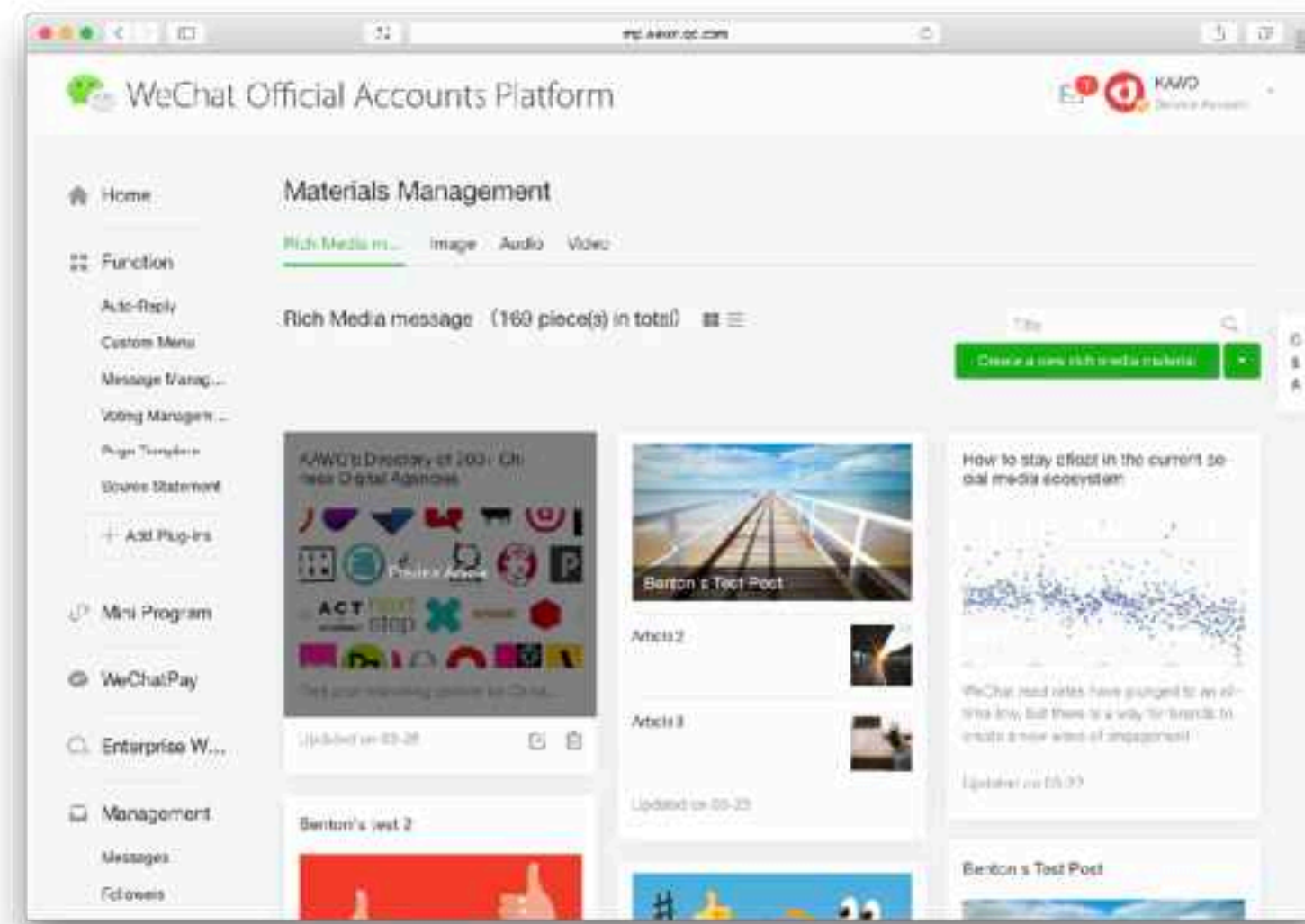
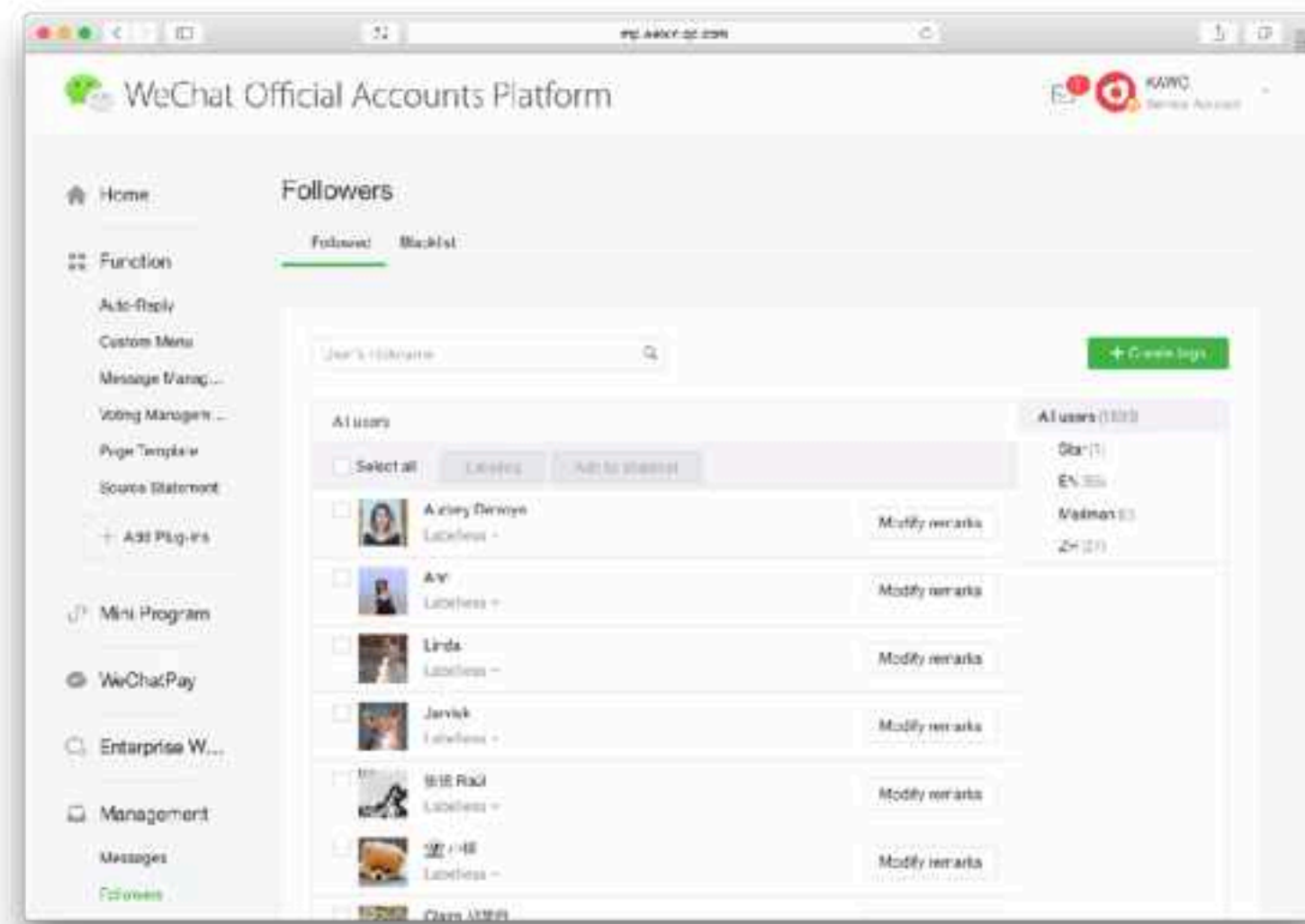
Verifying can be a complex process, made even worse when you don't speak or read Chinese. Luckily our friends at Grata have created this awesome step by step guide.

blog.grata.co/register-wechat-official-account



WECHAT OFFICIAL ACCOUNTS BACK END

The WeChat OA backend is simple to use. It's available in both English and Chinese and allows brands to manage their Official Account and push content to their followers.





T W O

WeChat Mini Programs

微信小程序

wēi xìn xiǎo chéng xù



WECHAT MINI PROGRAMS

WeChat's easier-to-use alternative to stand-alone apps, which allows you to avoid the "tedious process" of downloading and managing apps on a smartphone.

The Three Key Advantages of WeChat Mini Programs

1 LOAD INSTANTLY

Mini programs are restricted in size to ensure they can load instantly even on a slower internet connection. No messy sign up process, in just one click users can login with their WeChat account and get on with whatever they were trying to achieve.

2 EASY TO DEVELOP

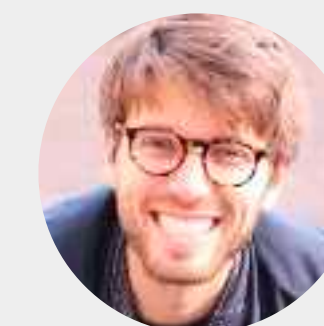
They can be built quickly and easily using web technologies like HTML, Javascript and CSS on top of a framework provided by WeChat with access to powerful APIs e.g. WeChat payments.

3 DEEPLY INTEGRATED

WeChat have gradually added touch points throughout the app for users to discover, share and interact with mini programs.

EXPERT OPINION

"Mini Programs provide 80% of the functionality of a native app, but with only 20% of the development effort"



Thibault Genaitay
General Manager
Le Wagon China



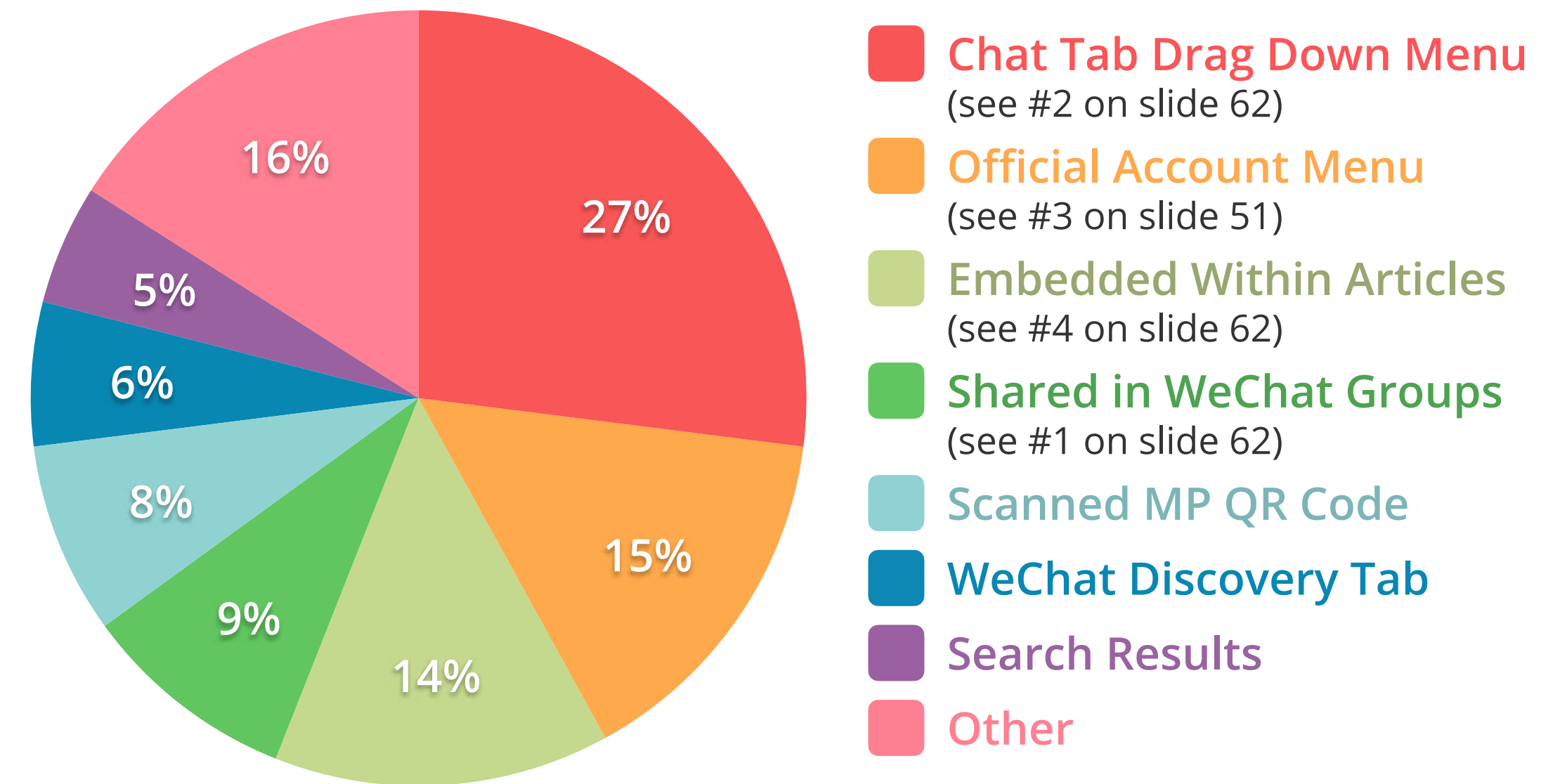
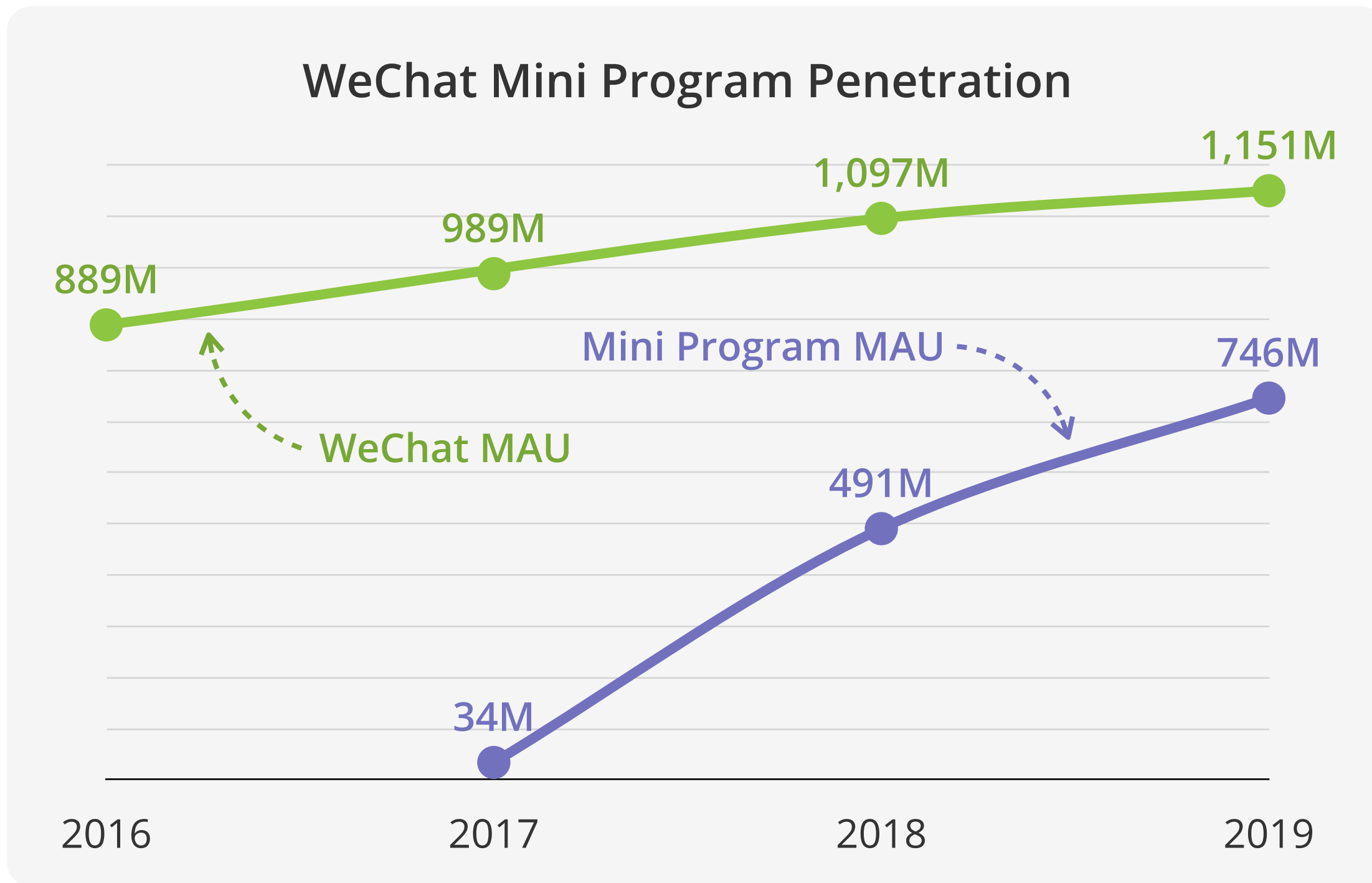
THE SUCCESS OF WECHAT MINI PROGRAMS

RAPID GROWTH

Mini programs were launched in January 2017 and still face a significant growth with +52% active users in a year from 2018 to 2019. For some apps, it has even overcome their native app traffic.

CONTINUOUS IMPROVEMENT

As we've seen from WeChat in the past, Tencent have constantly iterated and found ways to improve Mini Programs. There are now many different places throughout WeChat for users to discover and share Mini Programs, further improving their convenience.



watsons

MEMBERSHIP PROGRAM

1 Membership Card

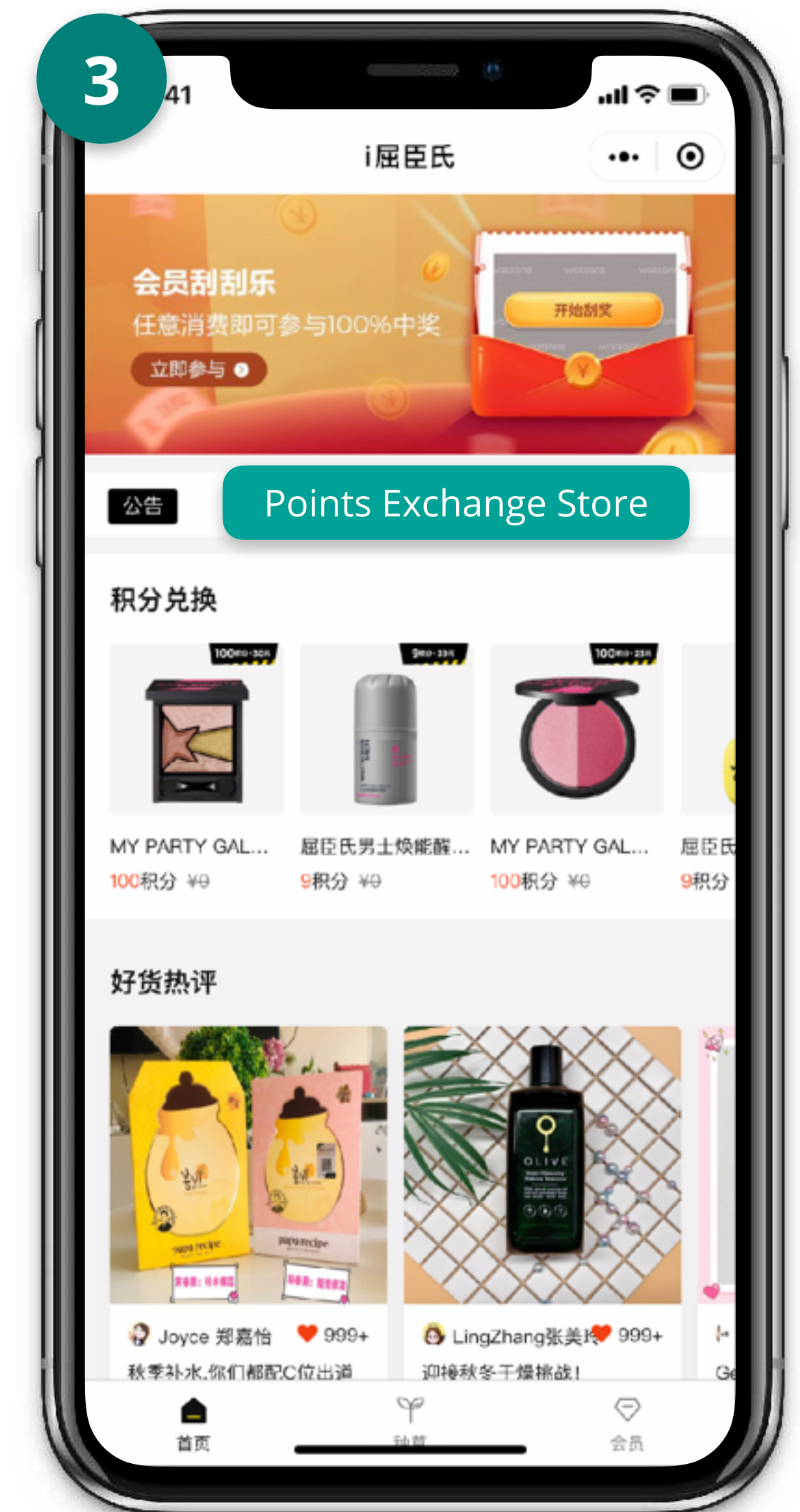
On the member page of a virtual membership card is displayed with info on a users levels and total points.

2 Member QR code

Customers present their QR code when making a purchase to add points to their card.

3 Points Exchange

Member can redeem their points for a variety of products.





FREE FITNESS COMMUNITY

1 Class List

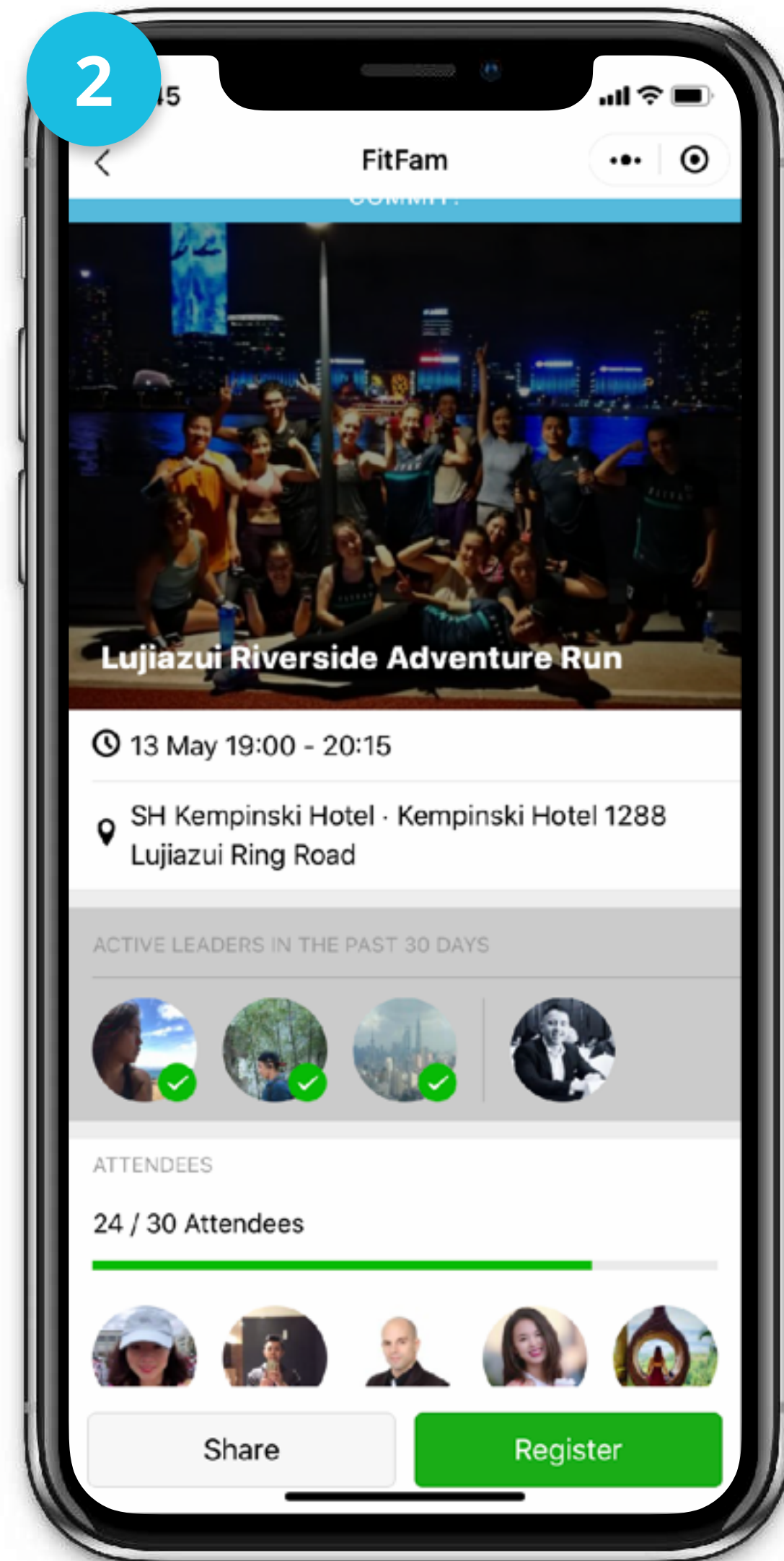
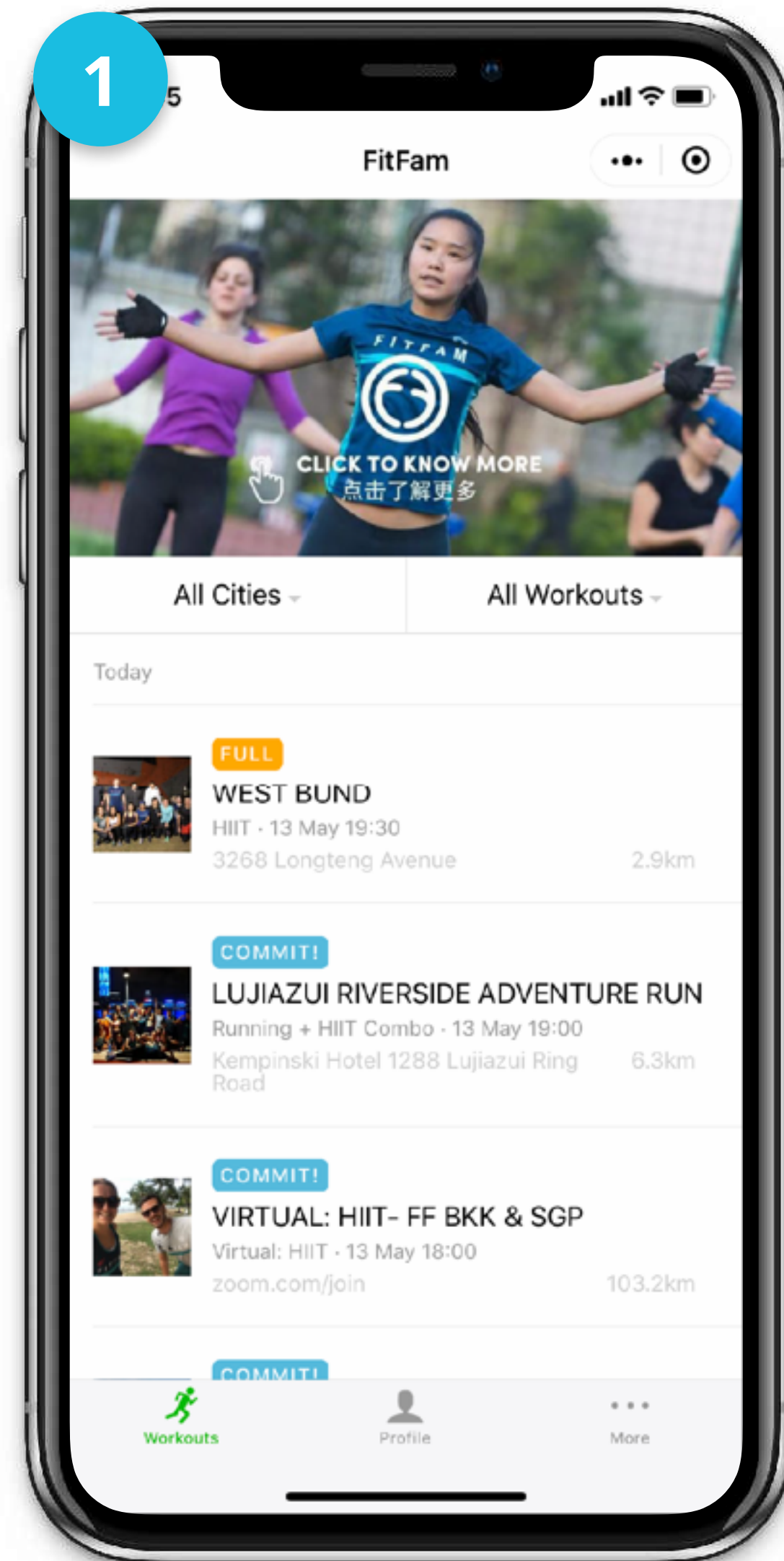
In FitFam's mini program, users can filter and search for community fitness classes nearby.

2 Class Details Page

Users can click a class to see more details or register to that class.

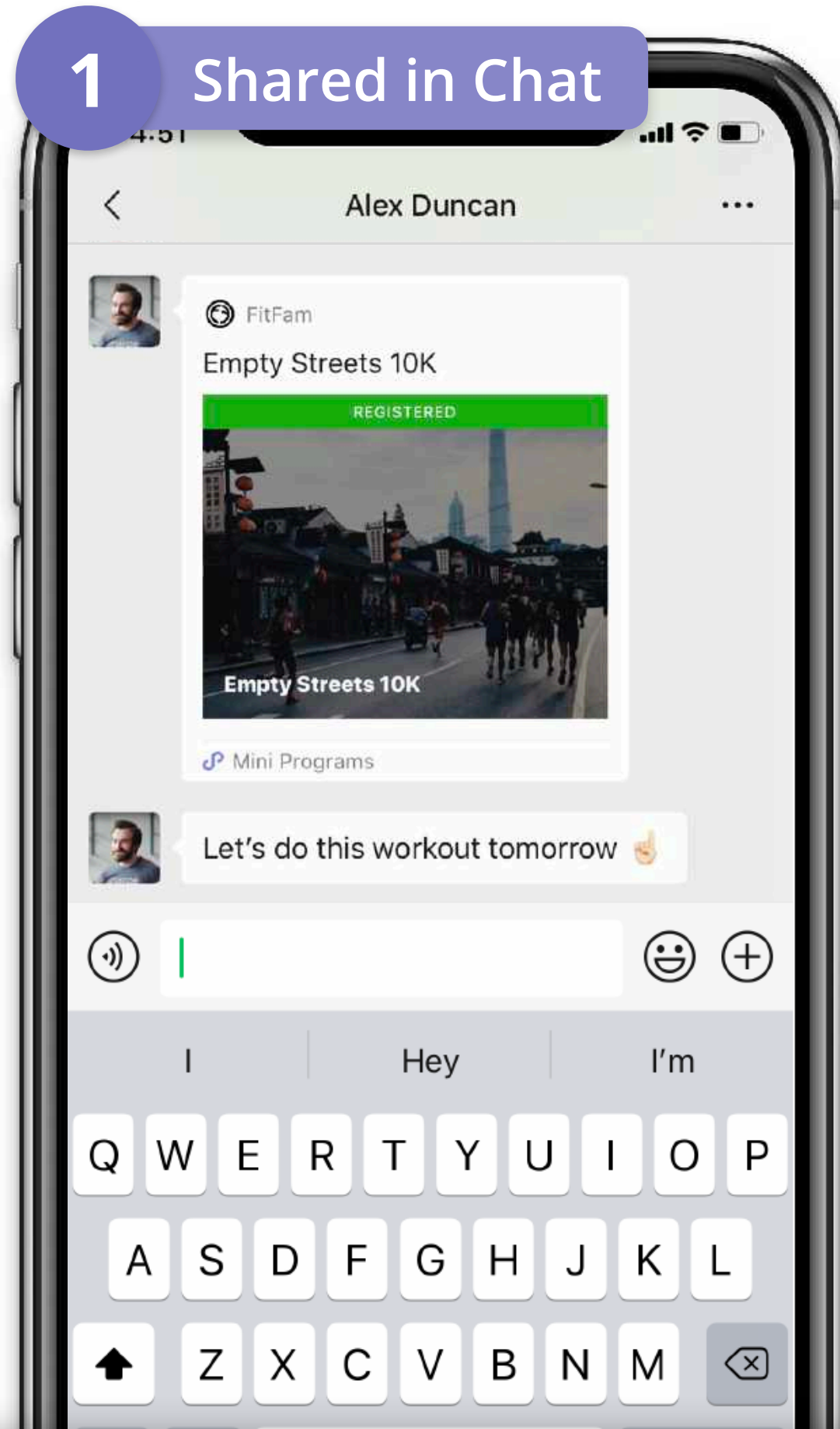
3 Map of Actual Location

A map shows the venue and some requirements for the client to bring along to the session.



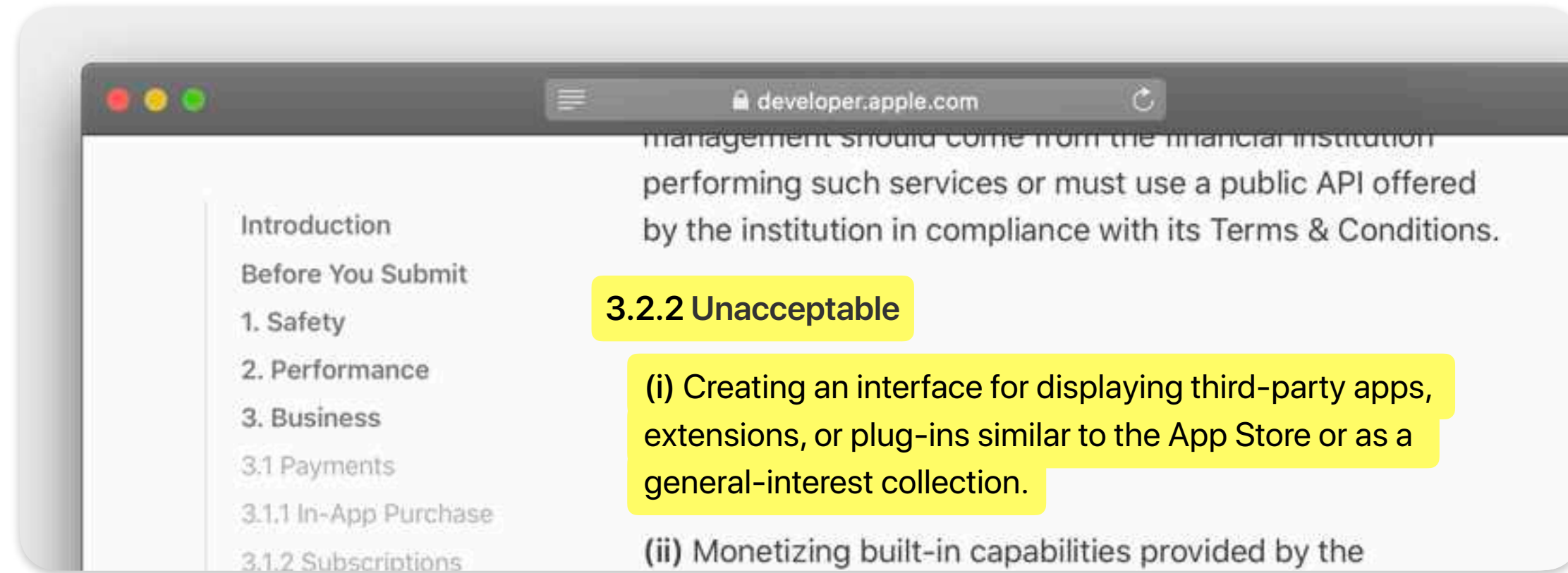


HOW USERS ACCESS MINI PROGRAMS





ARE MINI PROGRAMS THE TROJAN HORSE INSIDE THE IPHONE?



WeChat Mini Programs must be a huge headache for Apple.

Their rules for developers strictly prohibit iOS apps that allow “third-party apps...similar to the App Store”. Apple claims this is for ‘safety reasons’, but the App Store is a major source of revenue generating \$50bn globally in 2019.

WeChat is essential to daily life in China and although Apple only has around 10% market share, there are still estimated to be over 100m iPhones in use in China. Plus, consumers who own iPhones likely spend more than the average through WeChat. WeChat and Apple need each other. Apple can’t ban WeChat and WeChat can’t risk being unavailable on the iPhone.

When Mini Programs first launched they didn't seem like a credible threat to Apple. Allen Zhang (founder of WeChat) and his team have since continually tweaked and improved the experience of Mini Programs. WeChat now offers 2.36M Mini Programs and they are now more capable and available in more places throughout WeChat.





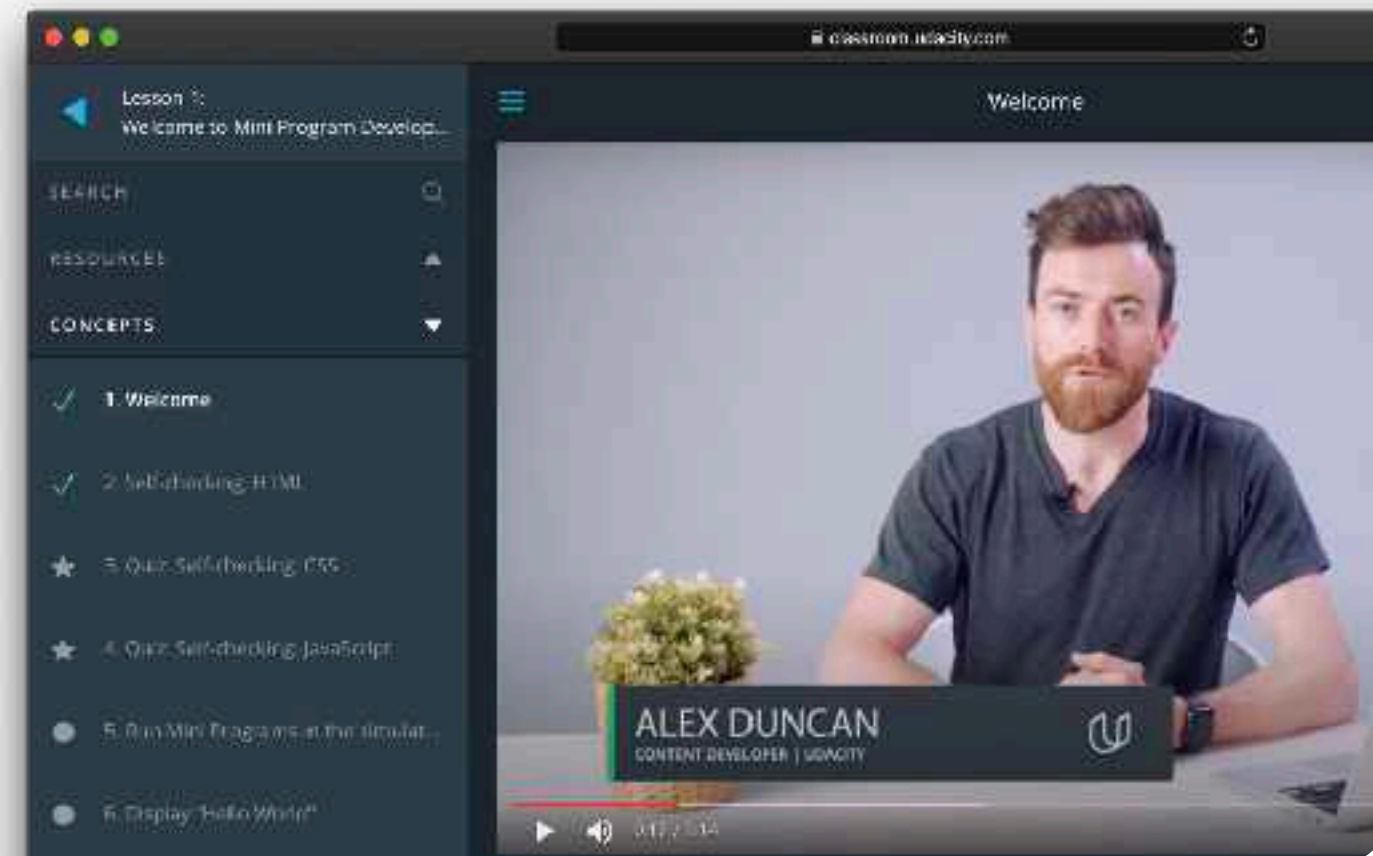
MINI PROGRAMS FURTHER READING



FREE ONLINE COURSE

WeChat Mini Program Development

[Udacity.com/course/wechat-mini-programs--ud667](https://udacity.com/course/wechat-mini-programs--ud667)



INSIGHTFUL WHITEPAPER

Best practices for E-commerce on WeChat Mini Programs

31ten.com.cn/wechat-mini-programs-e-commerce



PRACTICAL GUIDE

WeChat Mini Program Analytics Tutorial

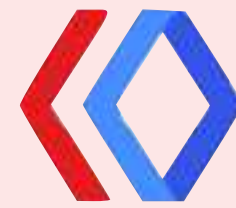
[Wiredcraft.com/blog/wechat-mini-program-analytics-tutorial](https://wiredcraft.com/blog/wechat-mini-program-analytics-tutorial)



NOW EVERY PLATFORM IS DOING MINI PROGRAMS

Seeing the success of WeChat's Mini programs, it didn't take long before all of Tencent's competitors launched their own versions.

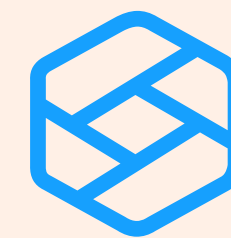
Most of these "Mini Programs" are a direct copy of the WeChat framework. You could almost take the code for a WeChat Mini program and upload it to the other platforms and it would mostly work. This is potentially a good thing for brands as it lowers the cost of developing mini programs for multiple platforms.



JUL 2018

"Smart Program"

Potentially a good option for improving your SEO. Baidu's Smart Programs allow brands to provide more functionality directly from a search result.



SEP 2018

"Tiny App"

Built around Alibaba's Alipay ecosystem, the Ali-flavor of Mini Programs are designed to allow brands to provide richer O2O functionality.

They've recently made improvements to help Weibo accounts to drive traffic to Taobao stores.



OCT 2018

"Micro App"

With the popularity of Douyin it makes total sense for ByteDance to launch mini programs to help accounts display ads and monetize their followers. Currently 35% of ByteDance's mini programs are mobile games.



THREE

WeChat Pay

微信支付

wēi xìn zhī fù



WECHAT PAY

By the end of 2018, WeChat Pay reached 86.4% of Chinese Mobile phone users.

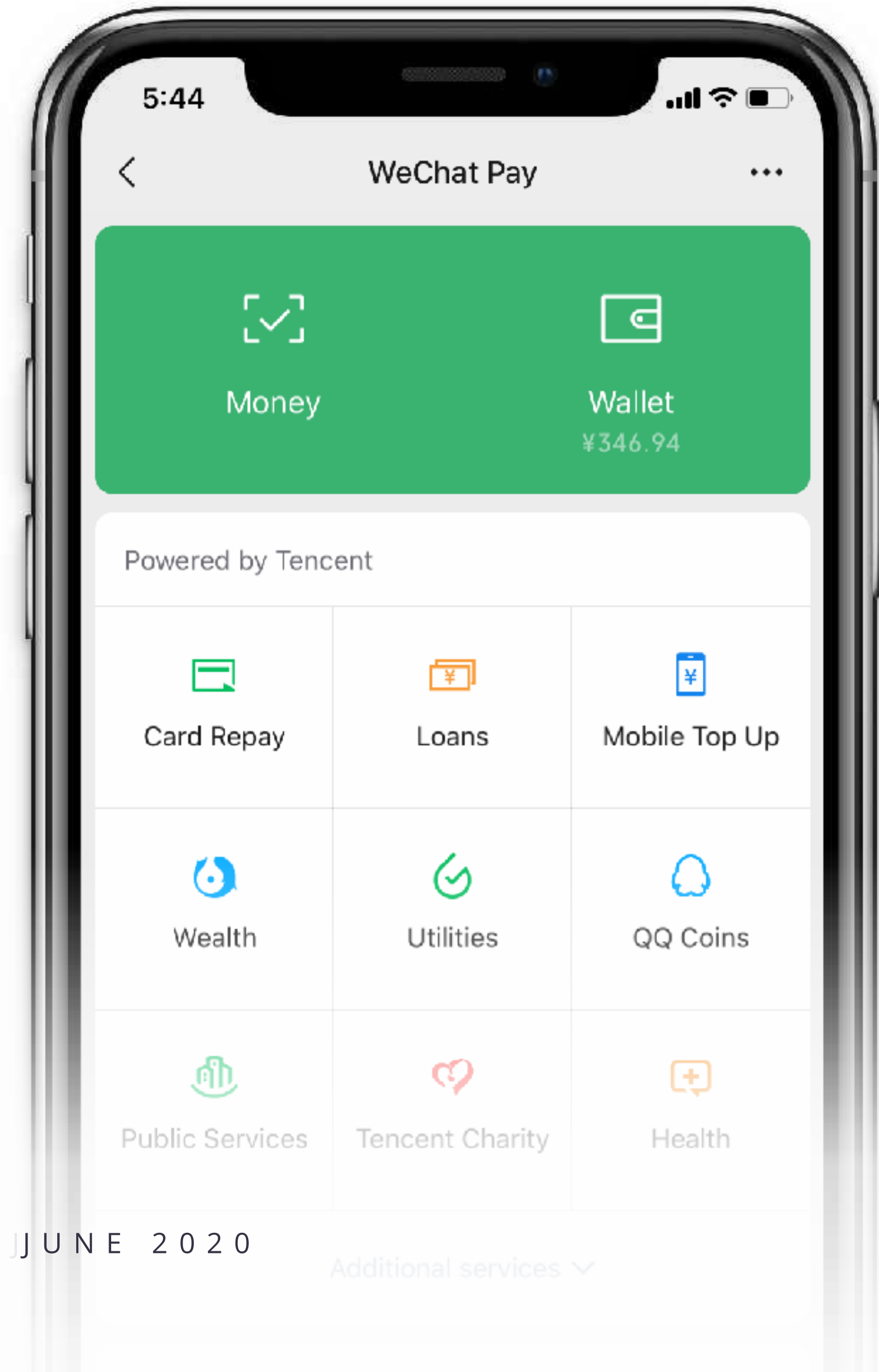
WeChat Pay is a native feature of WeChat and was first made to promote Tencent video games and incentives players to more easily make purchases.

THE PROMOTION

During 2014 Lunar New Year, WeChat created and promoted its "Red Packet" transfer, a digitalization of the Red Envelope for Chinese New Year. By 2017, 46 billion Red Envelopes have been sent.

MOBILE PAYMENT IN CHINA

In 2020, WeChat Pay is used by 900 million monthly active users with 1 billion transactions per day, from O2O connections, mini programs or Tencent platforms.





WECHAT PAY OPTIONS



ONE

Quick Pay

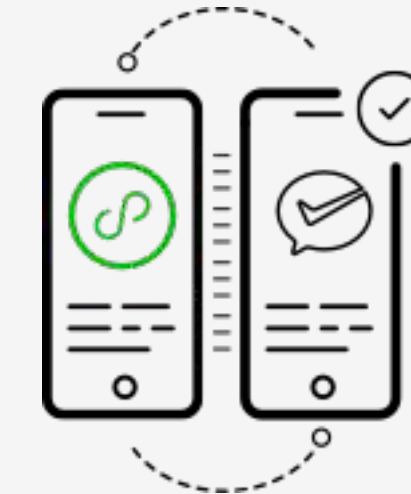
Users present their WeChat Pay payment code to the merchant. Merchants scan the code to take the payment.



TWO

QR Code Payment

Users open WeChat to scan the merchant's code, confirm the amount, and make the payment after passing the security checks.



THREE

Mini Program Payment

Users pay for goods or services within Mini Programs created inside WeChat.



FOUR

Official Account Payment

Users can pay for goods and services inside the merchant's Official Account.



FIVE

In-App Payment

Users make purchases in merchant apps using WeChat Pay.



SIX

Web Payment

Users use WeChat's "Scan" feature to scan a payment code on a web page to make a payment.



FOUR

WeChat Advertising

微信广告

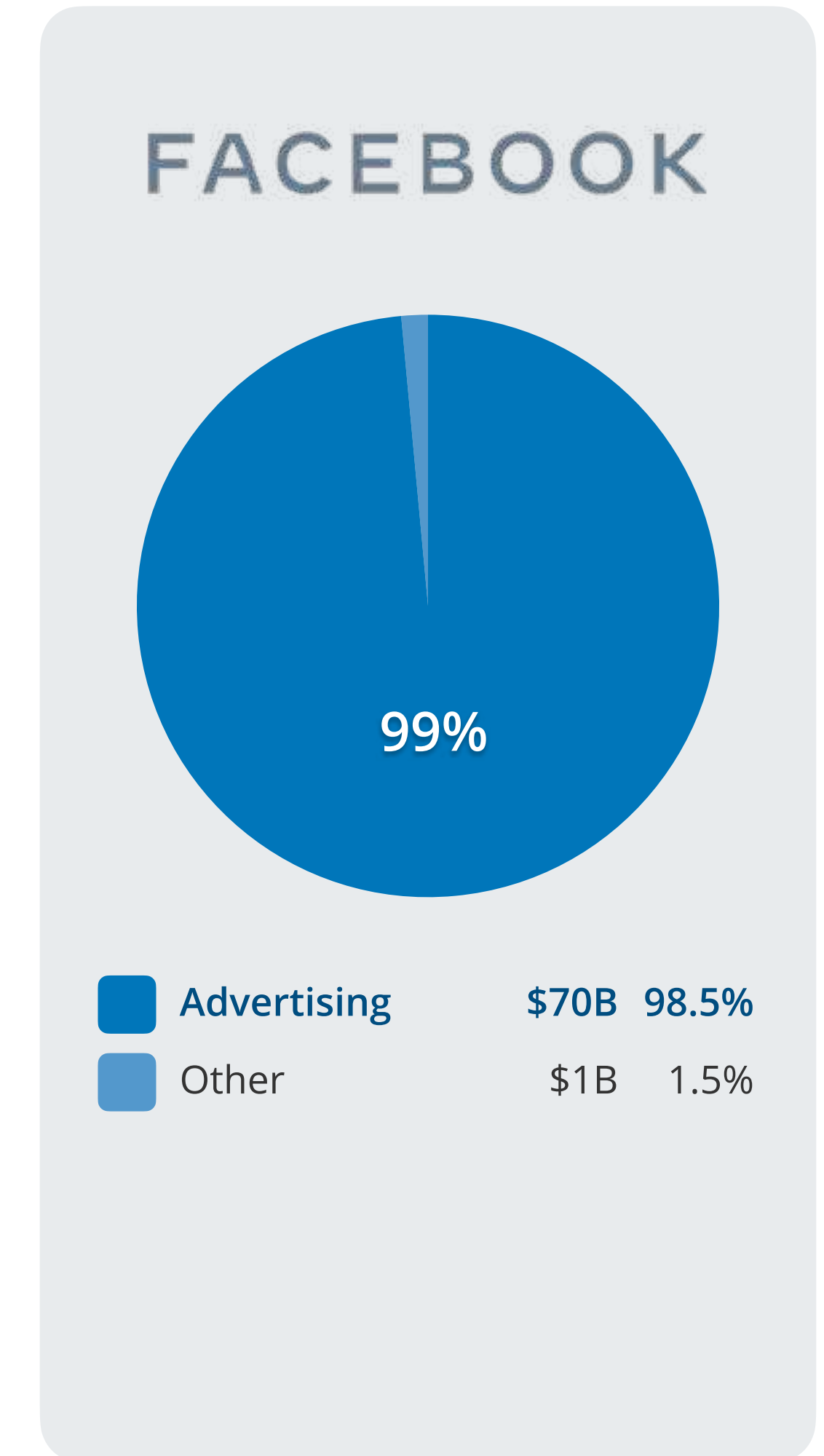
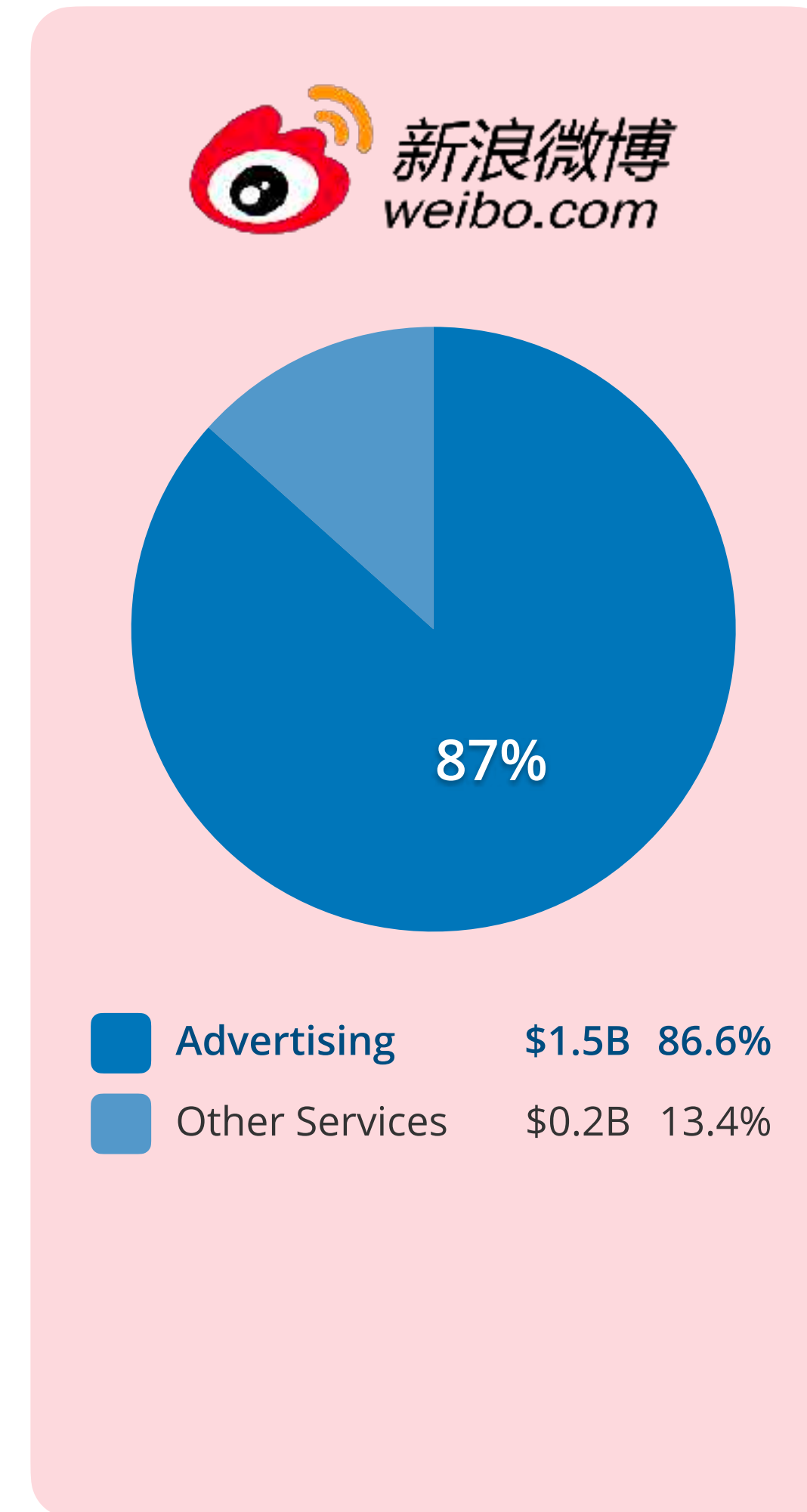
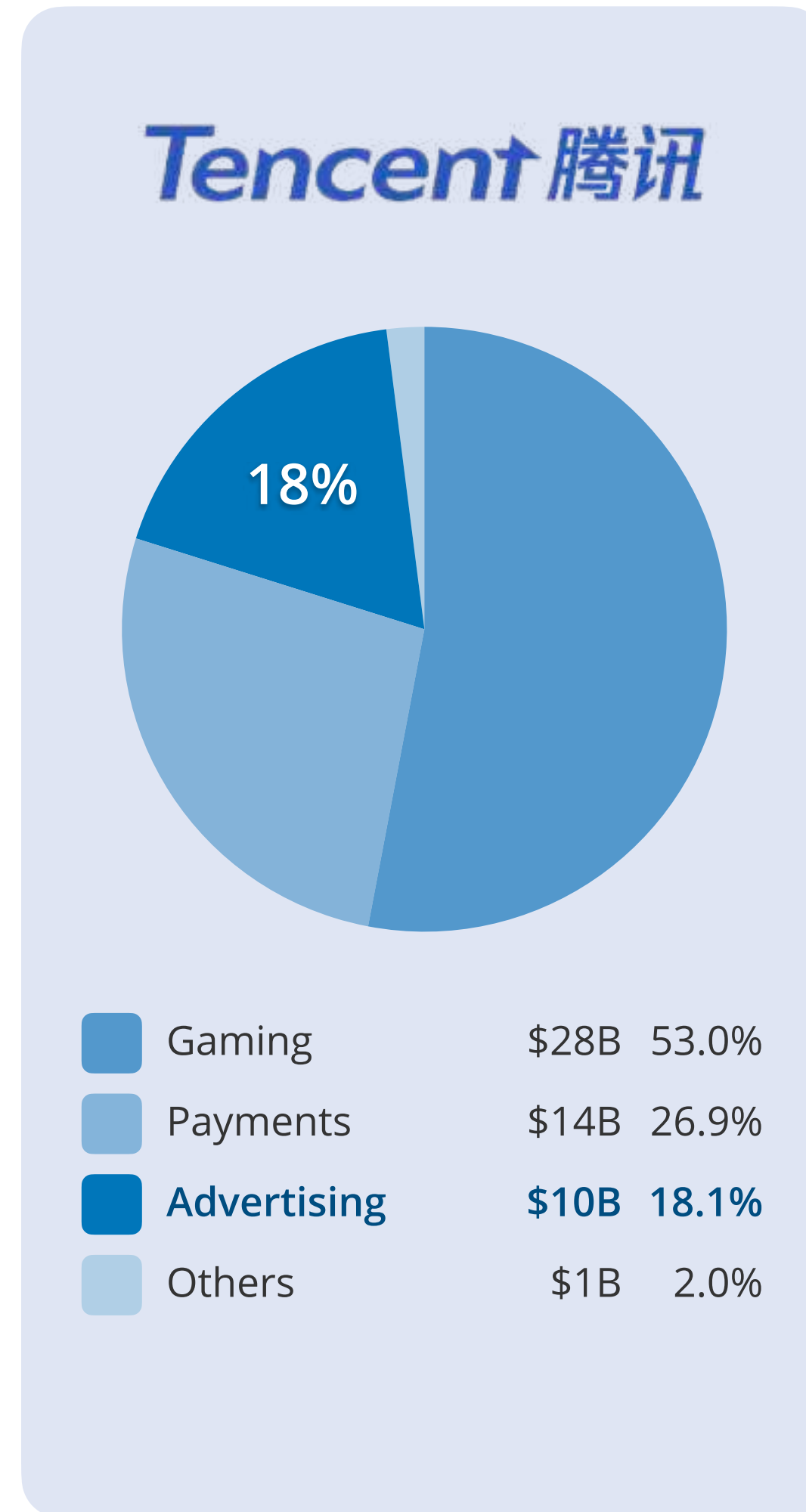
wēi xìn guǎng gào

TECH COMPANY SOURCES OF REVENUE

Unlike the majority of social platforms in the world, WeChat is not dependent on advertising.

Tencent's biggest revenue generator is games, and as we just saw, WeChat Pay processed \$17 Trillion worth of payments in 2019. Even though it charges a very low transaction fee of around 0.1% WeChat Pay still generates billions of dollars in revenue a year.

This has allowed WeChat to prioritize the experience of its users and avoid bombarding them with ads.





ONE



Moments Ads

Similar a "normal" post on users' WeChat moments. The post look like native content, except with an "Ad" icon on the top right corner

TWO



Article Banner Ads

You can add banners, in-text ads or video stickers at the end of articles to promote your official account.

THREE



Mini Program Ads

You can advertise through mini programs, with banner ads, mini-game ads or pop-ups while using the mini program.

FOUR



Account Promotion

In the subscription section, brands can now push their official account and promote one of their articles.



WECHAT MOMENTS ADS

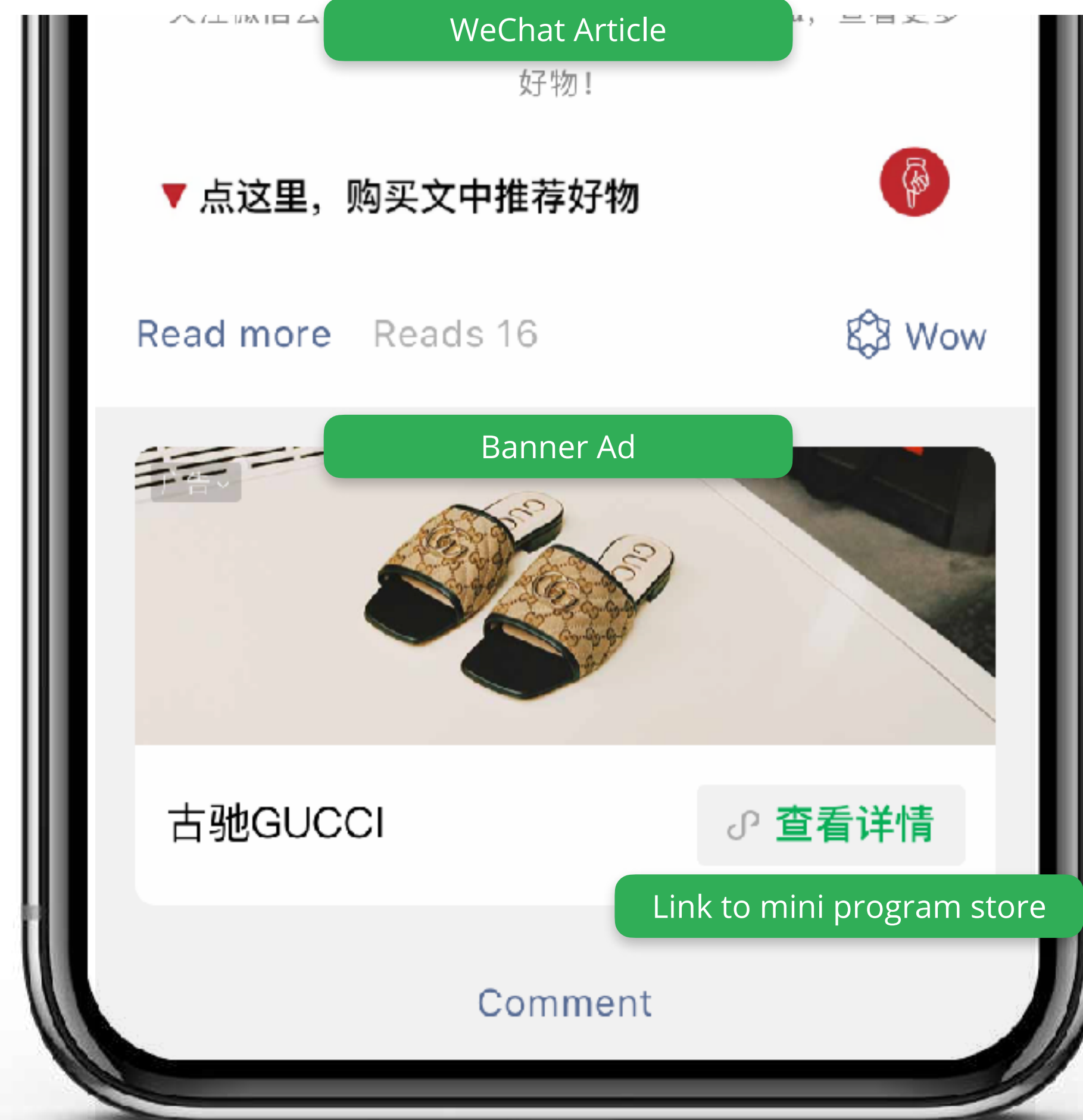
- WeChat users' timeline Ads look like native content among other WeChat moments' posts.
- Multiple formats are available, but the only requisite is a minimum investment of 50K RMB.
- Read: Advertising on WeChat Moments





WECHAT ARTICLE BANNER ADS

- In the middle or at the bottom of Official Account articles
- Link to brand's WeChat Mini Program
- Limited options
- Read: [WeChat Banner ads on WeChat Official Account](#)

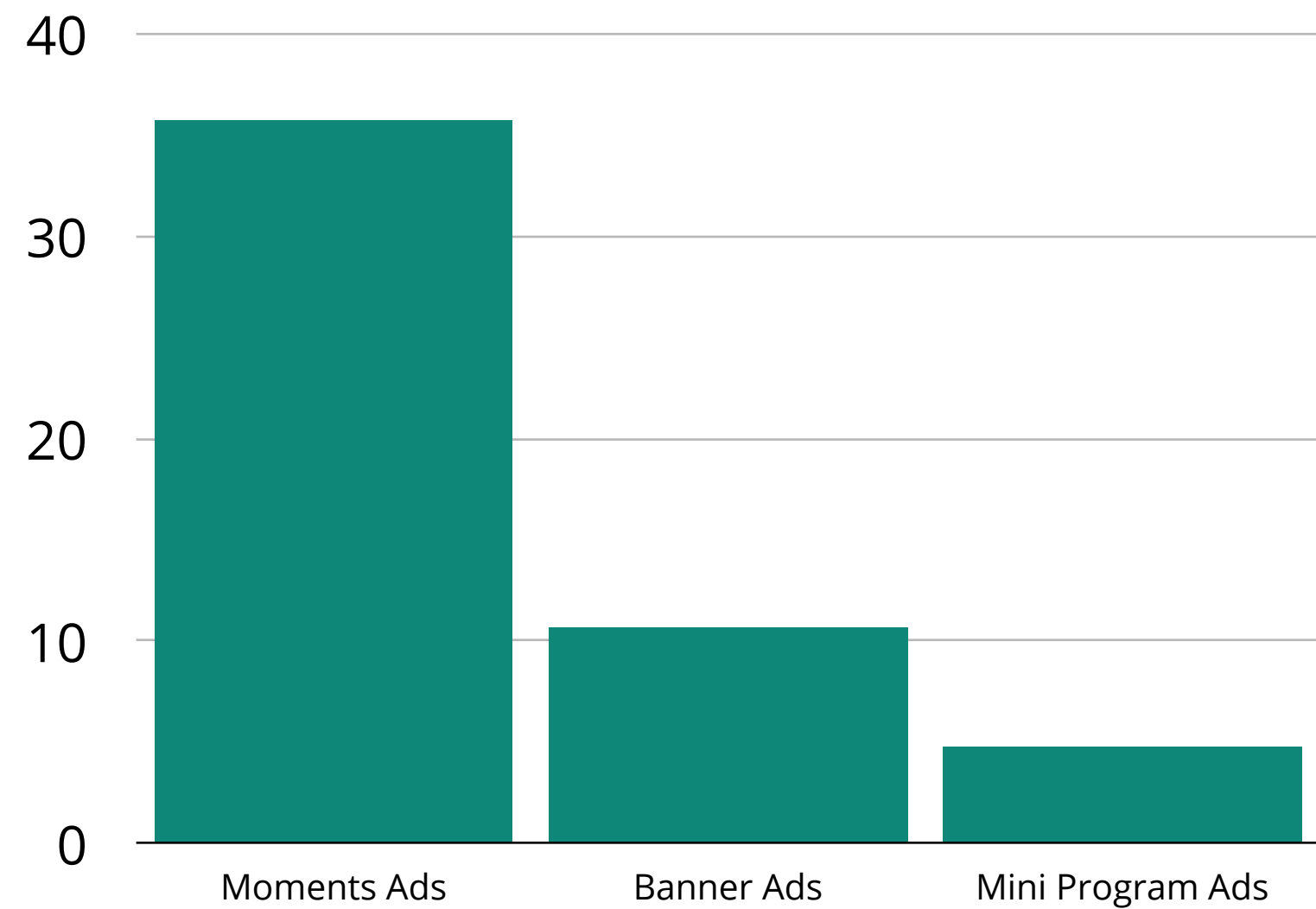




WECHAT MINI PROGRAM ADS

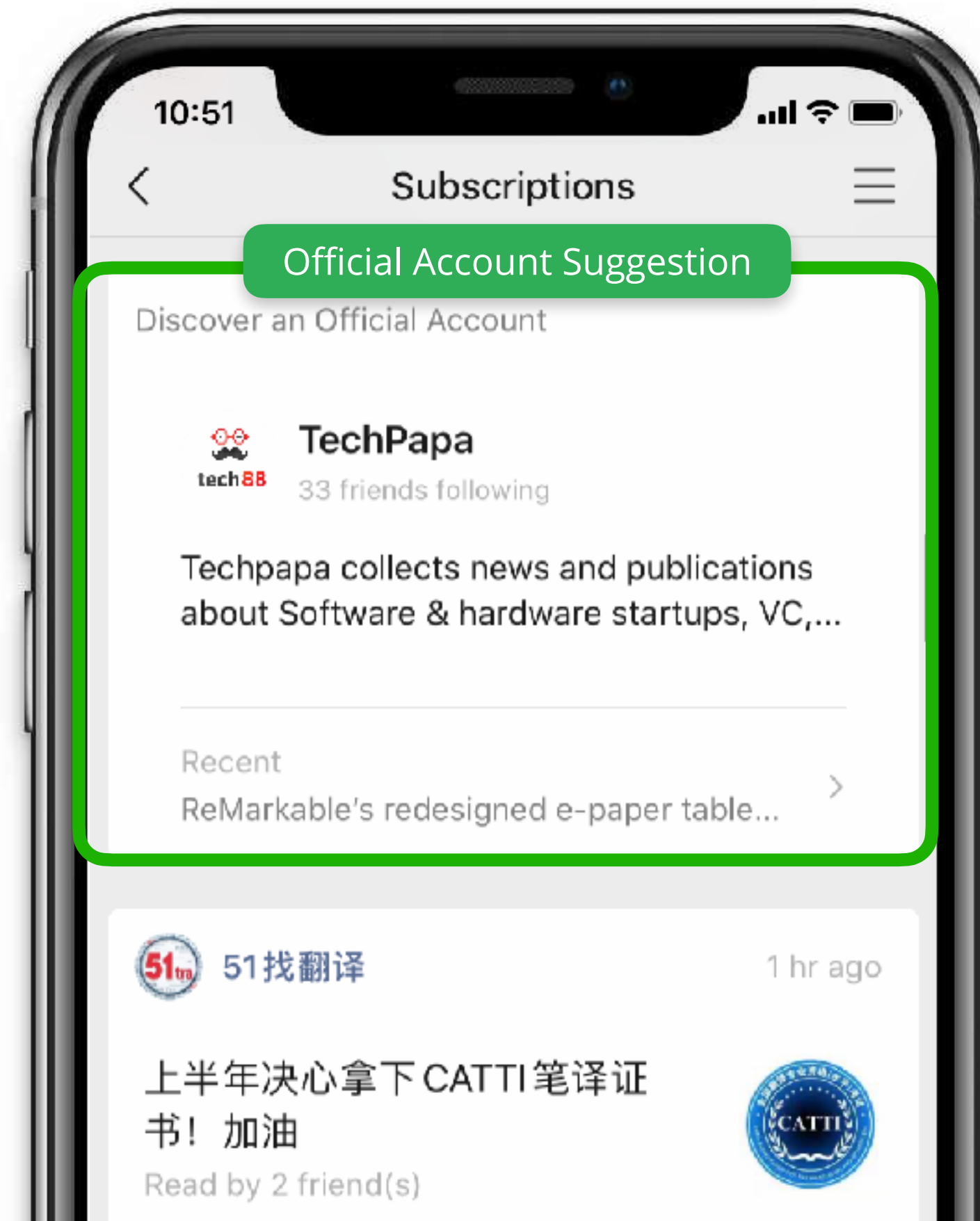
- The biggest advertisers on Mini Programs were e-commerce (21%) and Mini Games (23%) companies in 2018.
- Read: [Advertise on Wechat Mini Program](#)

Cost per follower for different types of WeChat ads formats



WECHAT ACCOUNT PROMOTION (2020)

- This is WeChat's latest ad feature in 2020.
- Brands can advertise in the Subscription list section to promote one of their articles.





MUST READ GUIDE

WeChat Social Ads Playbook

To build successful WeChat strategies, it is crucial for businesses to master these various ad formats, ad touch points, ad features, bidding tactics and audience targeting possibilities.

asia.fabernovel.com/2020/03/16/wechat-social-ads-playbook/





FIVE

WeChat Work

企业微信

qǐ yè wēi xìn



WECHAT FOR WORK

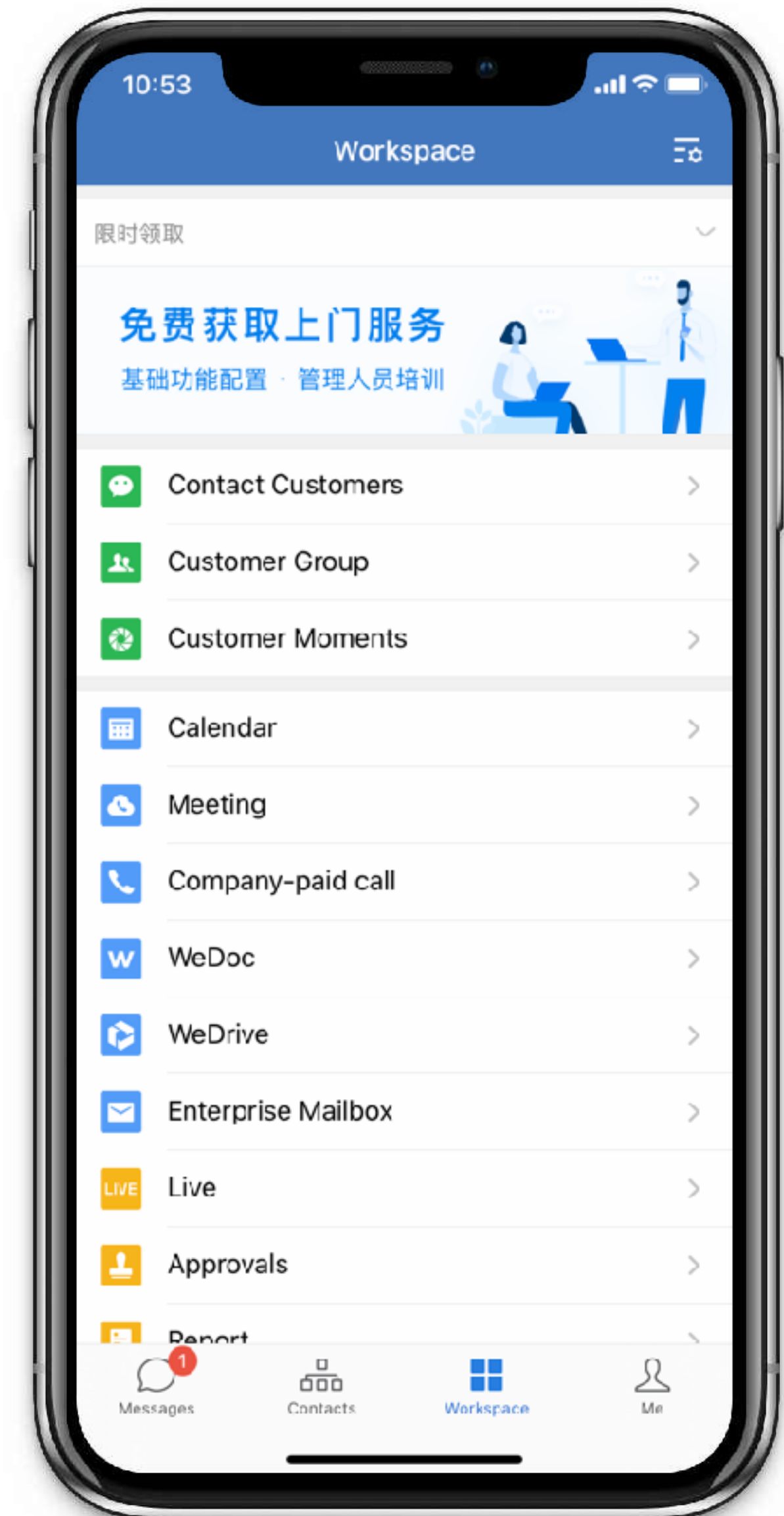
Separate Business and Private Life.

The benefits of WeChat Work to companies include:

- Ownership of customer contacts when employees leave.
- Easy sharing of tasks and files within your team.
- Approval of expenses and holiday leave applications.
- Clear organizational chart.
- More security and privacy, by having full control of who joins which groups.
- Separation between private and professional life.
- Complete interoperability with WeChat.

Example:

Front line staff in stores can add customers to WeChat for work. The company can then access those contacts and bind them to records inside it's CRM. This both reduces the risk for the company and improves the customer service tools available to staff on the shop floor.





ESSENTIAL GUIDE
WeChat Work 3.0

Grata wrote the comprehensive guide to WeChat Work. Everything you need to quickly understand why WeChat Work is important, tips for implementing it at your organization, and deep dives into the essential features.

blog.grata.co/wechat-at-work



PRACTICAL GUIDE
**WeChat Work Strategies
for Retail Digital Transformation**

Great practical guide to how brands can use WeChat Work to activate their frontline staff to better engage customers.

it-consultis.com/



SIX

WeChat Social CRM

微信社媒客户关系管理

wēi xìn shè méi kè hù guān xì guǎn lǐ

SOCIAL CRM THROUGH WECHAT

We've already covered WeChat Official Accounts, Mini Programs, WeChat Pay and WeChat Work. Social CRM is the piece that binds everything together, connecting the offline world and allowing you to provide awesome personalized journeys for your customers.

The WeChat ecosystem has become increasingly noisy with millions of accounts vying for the limited attention spans of users. Social CRM on WeChat provides an opportunity for you to build more meaningful connections and avoid spamming your followers.

There is no official product provided by WeChat, but there are a wide range of SaaS software vendors and consultancy companies that will guide you through the process of connecting all the different pieces together.

EXPERT OPINION

"The Wechat Ecosystem is China's defacto consumer service center, having sCRM automation tools and strategies has gone from being advanced to being required"



Aaron Chang
Founder & CEO
[JINGdigital](#)

MUST READ GUIDE

What to Consider When Implementing a WeChat Social CRM Strategy in China

31ten.com.cn/social-crm-scrm-in-china/





Weibo



Weibo

CHINESE NAME

微博

wēi bó

Phonetic: way-bore

LAUNCHED

2009

OWNERSHIP



31%

SUMMARY

Micro-blogging news site
+ potential for virality.

KEY FEATURES

Micro-blogging, trendy topics,
news

COMPARABLE TO



Twitter



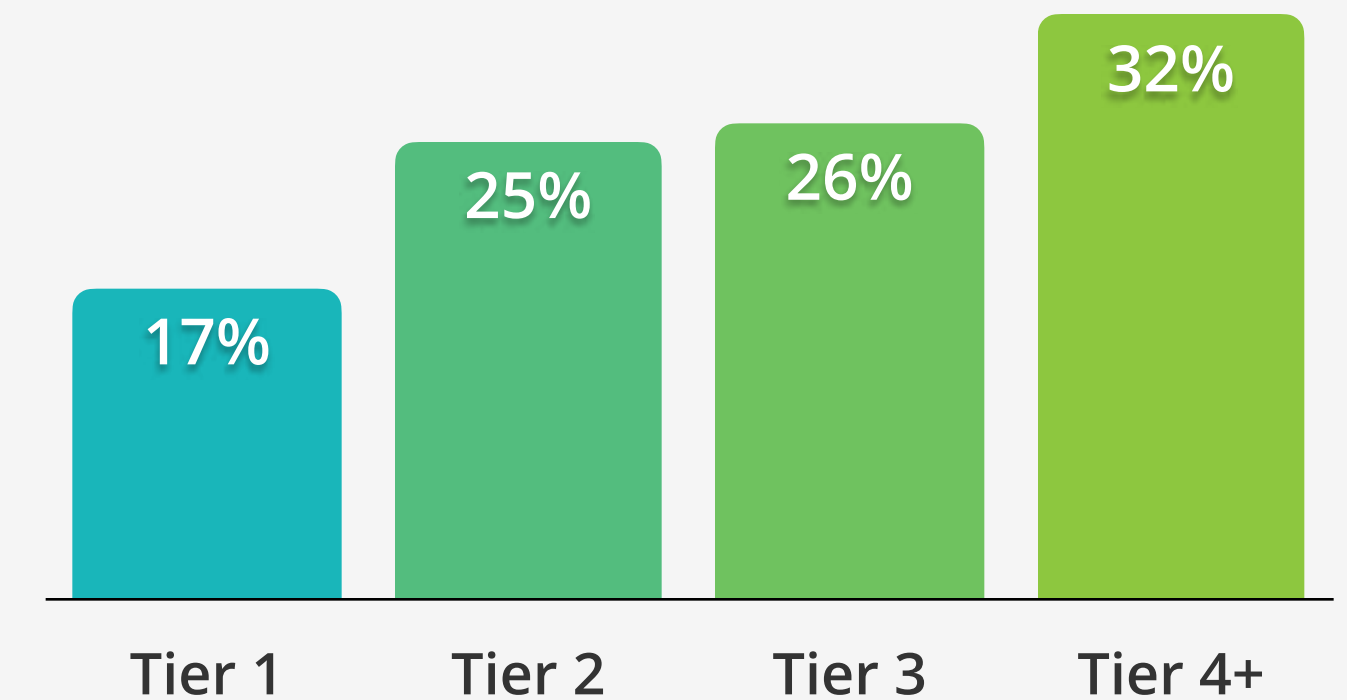
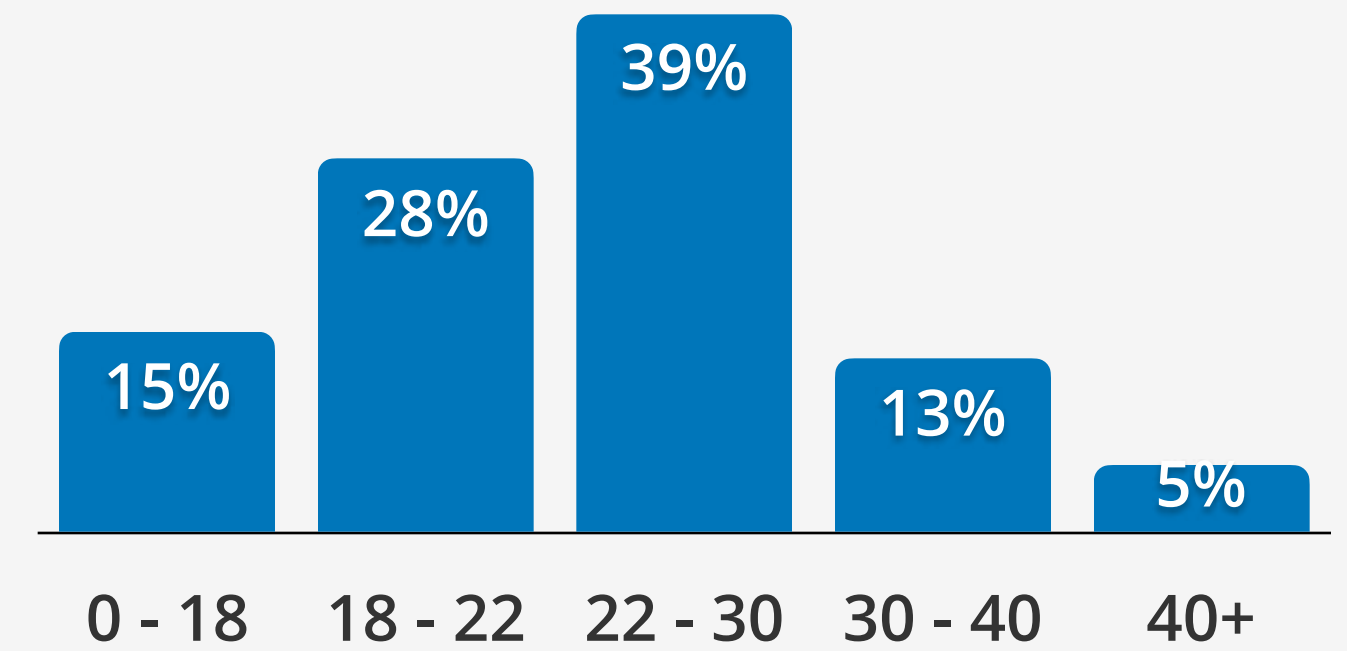
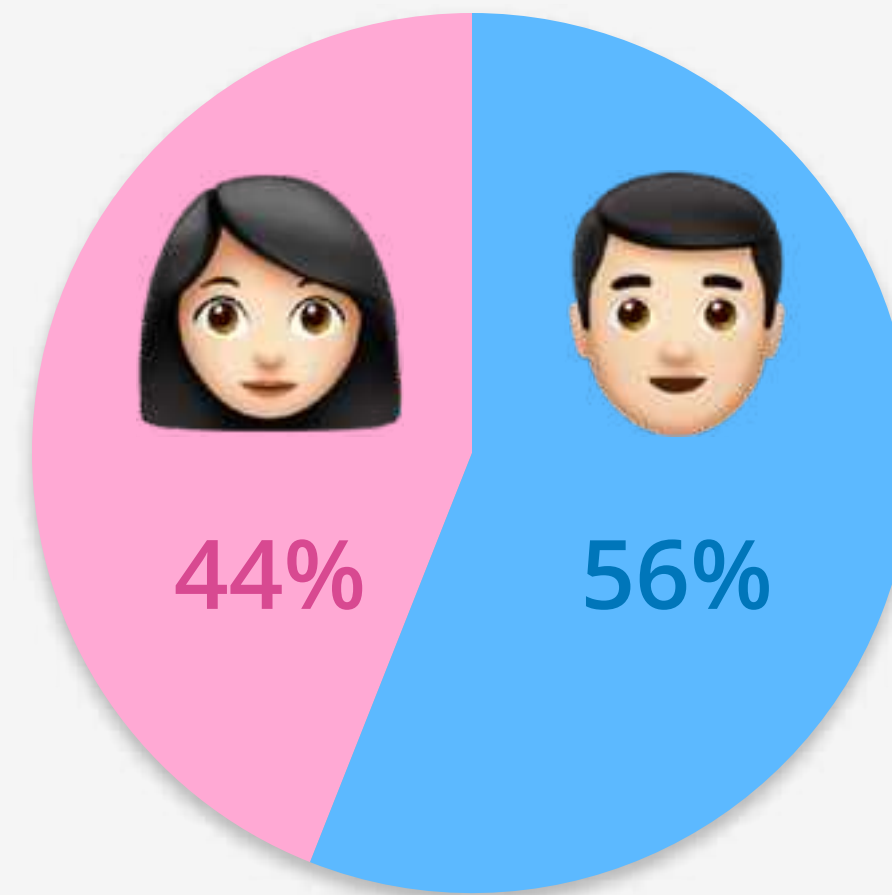
Facebook Newsfeed

MONTHLY ACTIVE USERS

520 million

(Jan 2020)

DEMOGRAPHICS





QUICK GLIMPSE

1 Feed

Algorithmic feed showing users a mix of content from accounts they follow, as well as hot posts and posts engaged with by their followers.

2 Hot Topics

Topics trending on Weibo in real-time are an important place for marketers to pay attention and capture the zeitgeist.

3 Brand Profile

Each account has its own profile page that can be styled to match the brand. Top content can be pinned.





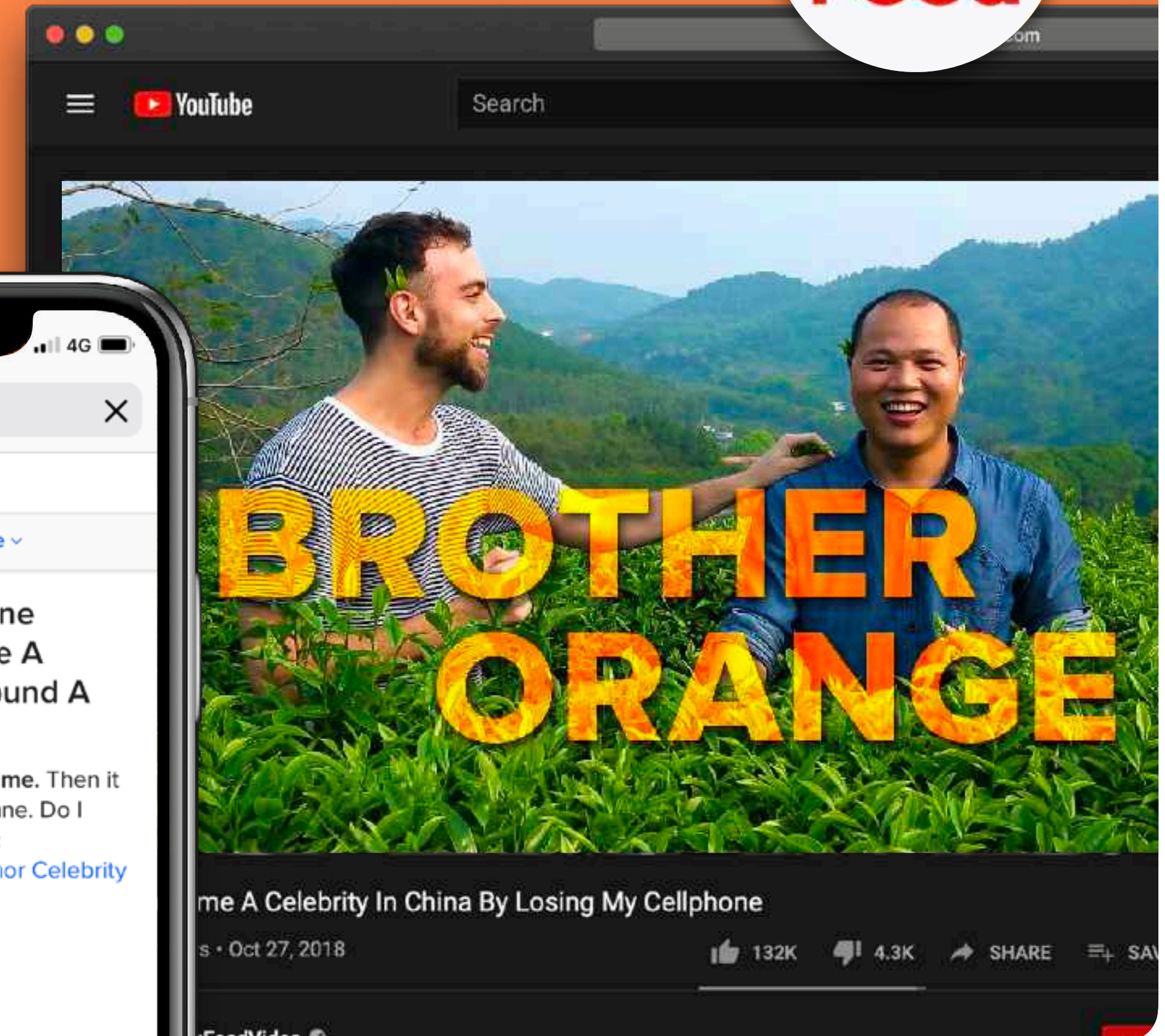
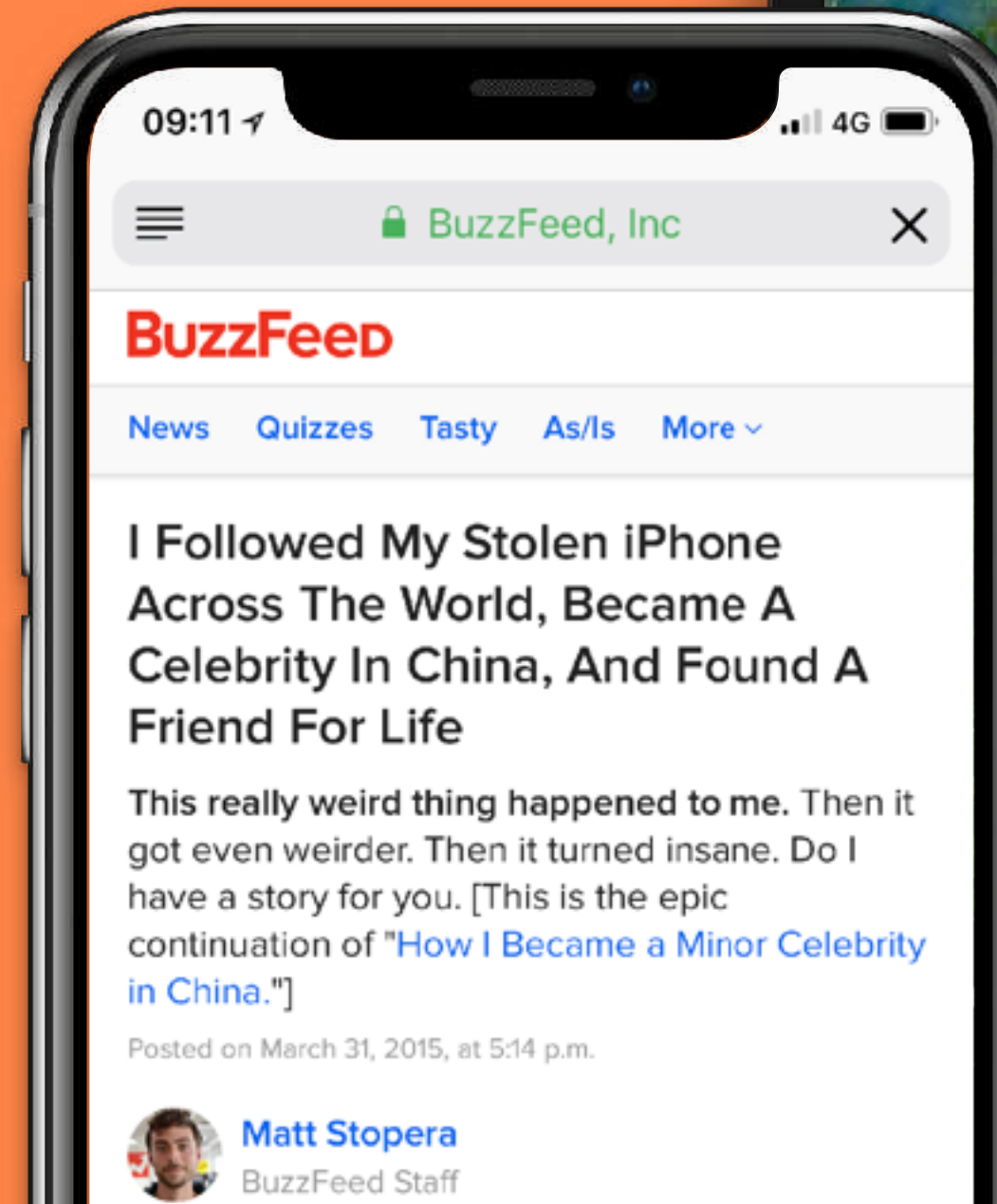
GET A FEELING FOR WEIBO

Brother Orange

Discover the power of Weibo's virality through the incredible story of Matt Stopera, an American who followed his lost phone.

[BuzzFeed.com/mjs538/how-i-became-a-minor-celebrity-in-china-after-my-lost-iphone](https://www.buzzfeed.com/mjs538/how-i-became-a-minor-celebrity-in-china-after-my-lost-iphone)

[Youtu.be/PcgAU5hmzOQ](https://youtu.be/PcgAU5hmzOQ)





READ & FOLLOW

What's On Weibo

Since 2014 Manya Koetse has been covering the society, culture, and history of an ever-changing China through the lens of Chinese social media.

WhatsOnWeibo.com

Twitter.com/WhatsOnWeibo

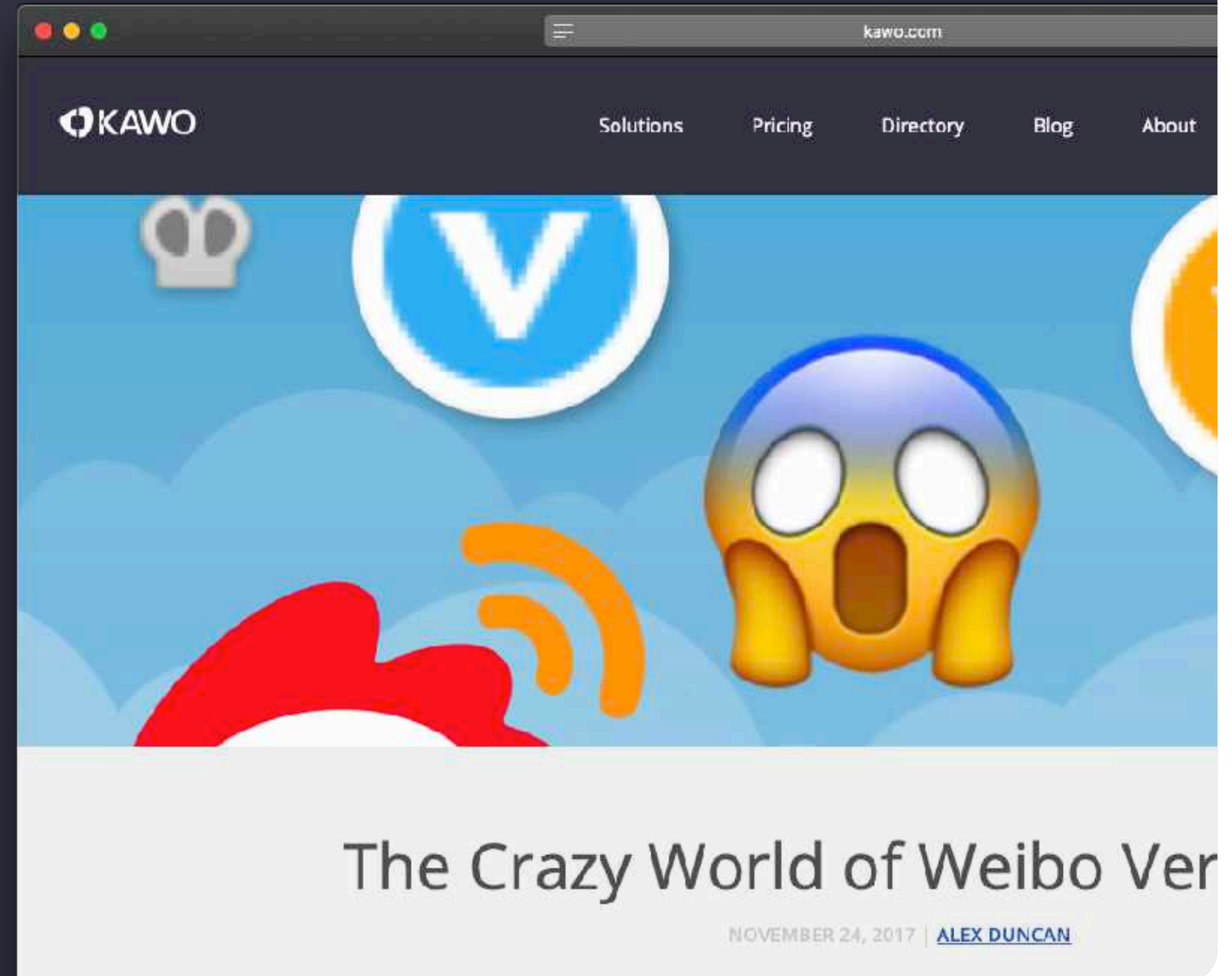


ESSENTIAL GUIDE

The Crazy World of Weibo Verification

Even in Chinese navigating Weibo's help documentation is a challenge. We created this simple guide to demystify Weibo's complex variety of Verification options.

kawo.com/weibo-verification





WEIBO ADVERTISING OPTIONS

Weibo has been around a long time and as you'd expect for a platform where 87% of their revenue depends on ads they have the most mature and sophisticated ad platform.

SIMPLE & USER-FRIENDLY

Weibo's advertising platform is simple to use and offers many features for all sorts of promotions. Brands can find more options, and be granted more visibility on Weibo than any other platform.

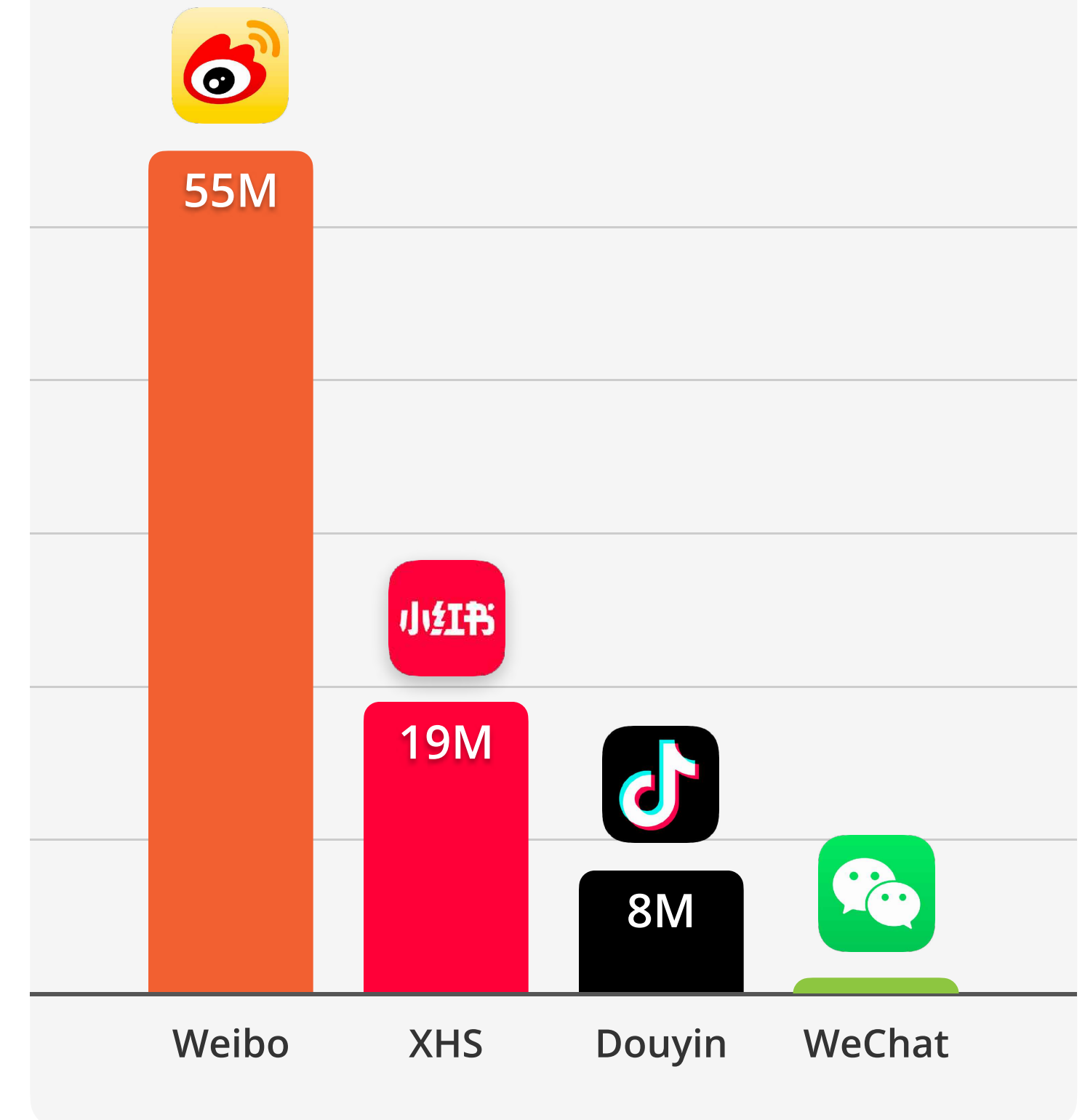
WEIBO ADS VALUE FOR MONEY

Weibo has 222 million daily active users, with 80% of those under the age of 35. As you can see from the chart on the right Weibo can be a lot more cost effective for generating impressions than other social platforms.

FUTURE OPPORTUNITIES

In April 2020, Weibo also expanded into social commerce, launching Weibo Stores. It allows individuals and brands to promote products in their posts for customers to complete the purchase directly within the platform.

Approximate number of impressions for a 1 million RMB investment





WEIBO ADVERTISING OPTIONS

1 Display Ads



2 Search Promotion



3 Fans Headline (粉丝头条)



4 Fans Tunnel (粉丝通)

A Weibo Ad tool which offers sophisticated targeting options to promote information to fans and potential fans.





MUST READ GUIDE

Unleashing the Power of Weibo Ads

Fabernovel distilled their 8 years of helping Western brands to leverage Weibo into this comprehensive guide. In it, they cover all the options and provide tips on how to run a successful campaign.

asia.fabernovel.com/2020/04/23/unleashing-the-power-of-weibo-ads-superfans-edition





Douyin



Douyin
(TikTok)

CHINESE NAME

抖音

dǒu yīn
Phonetic: doe-ying

LAUNCHED

2016

OWNERSHIP



SUMMARY

Video-sharing social network, the Chinese portal of TikTok

KEY FEATURES

Short videos

COMPARABLE TO

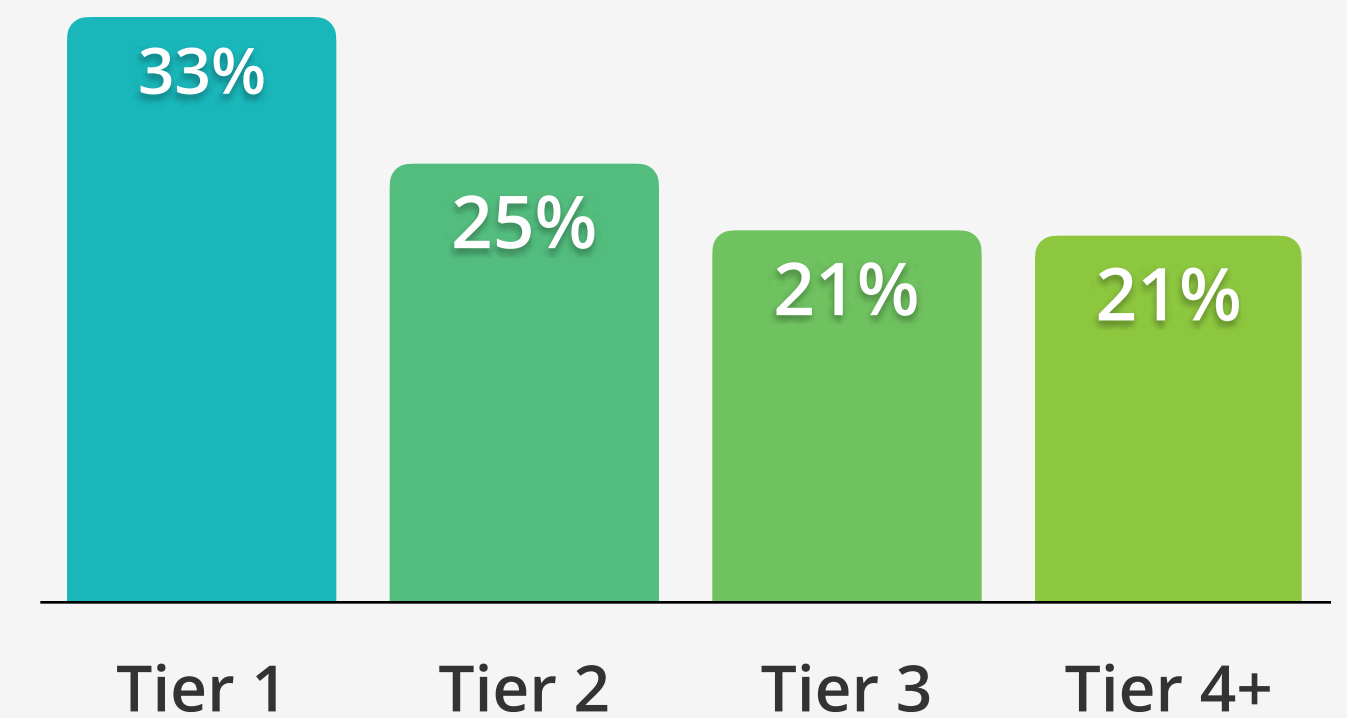
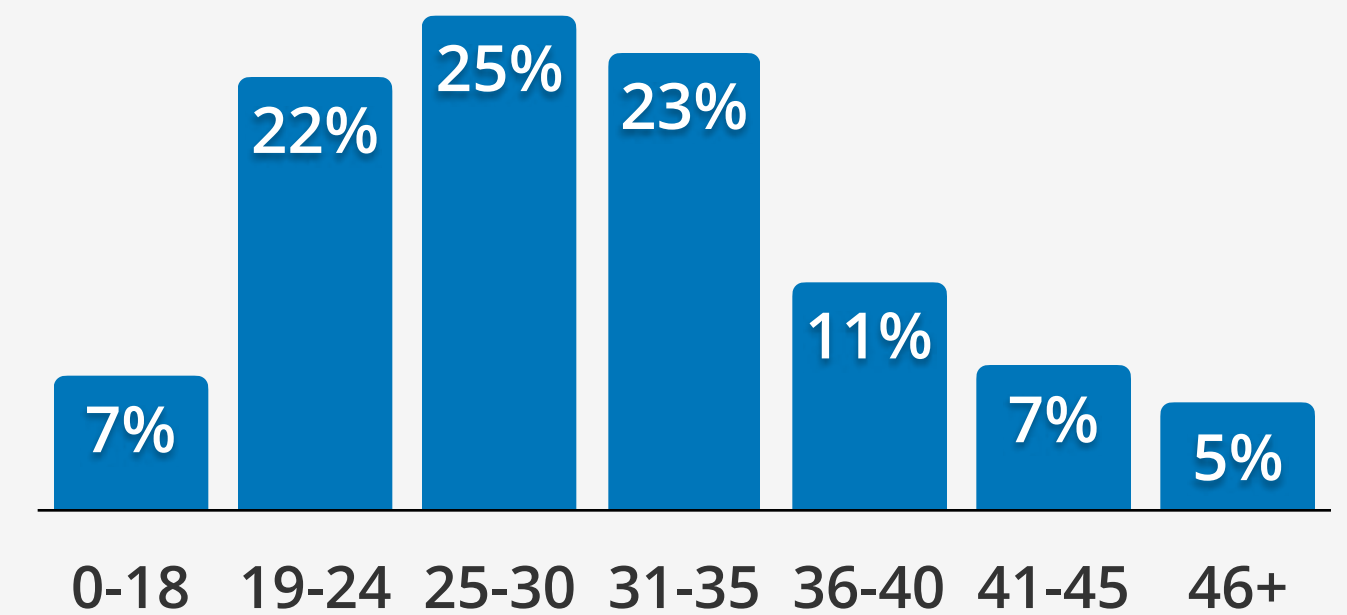
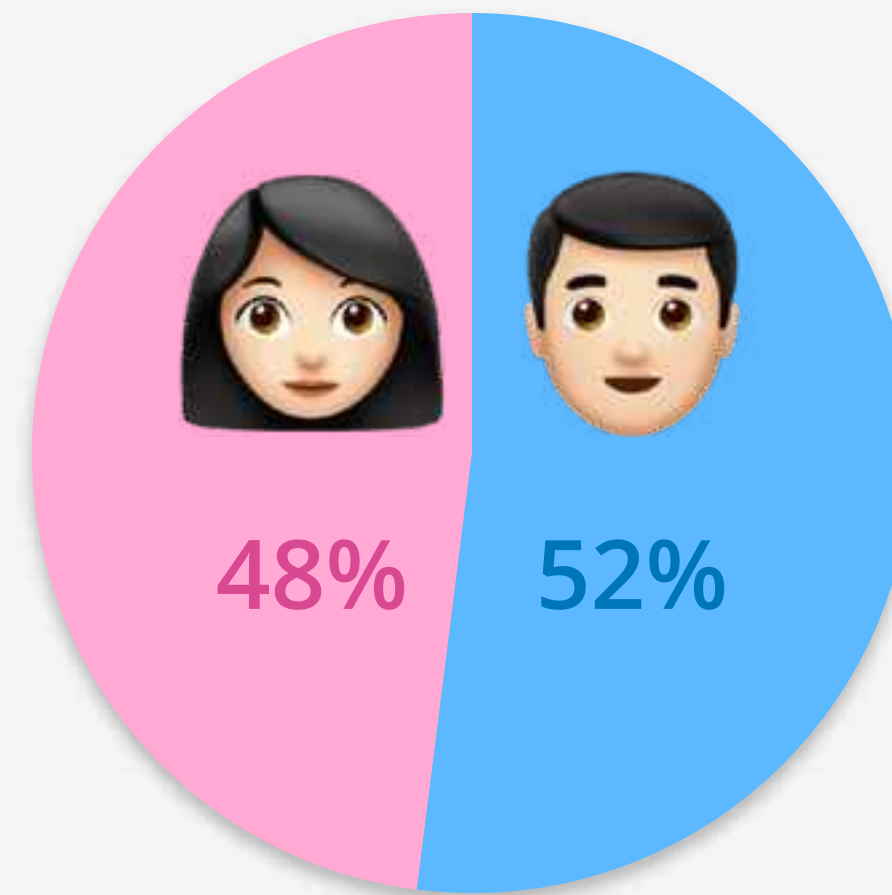


MONTHLY ACTIVE USERS

475 million

(Jan 2020)

DEMOGRAPHICS





QUICK GLIMPSE

1 Feed

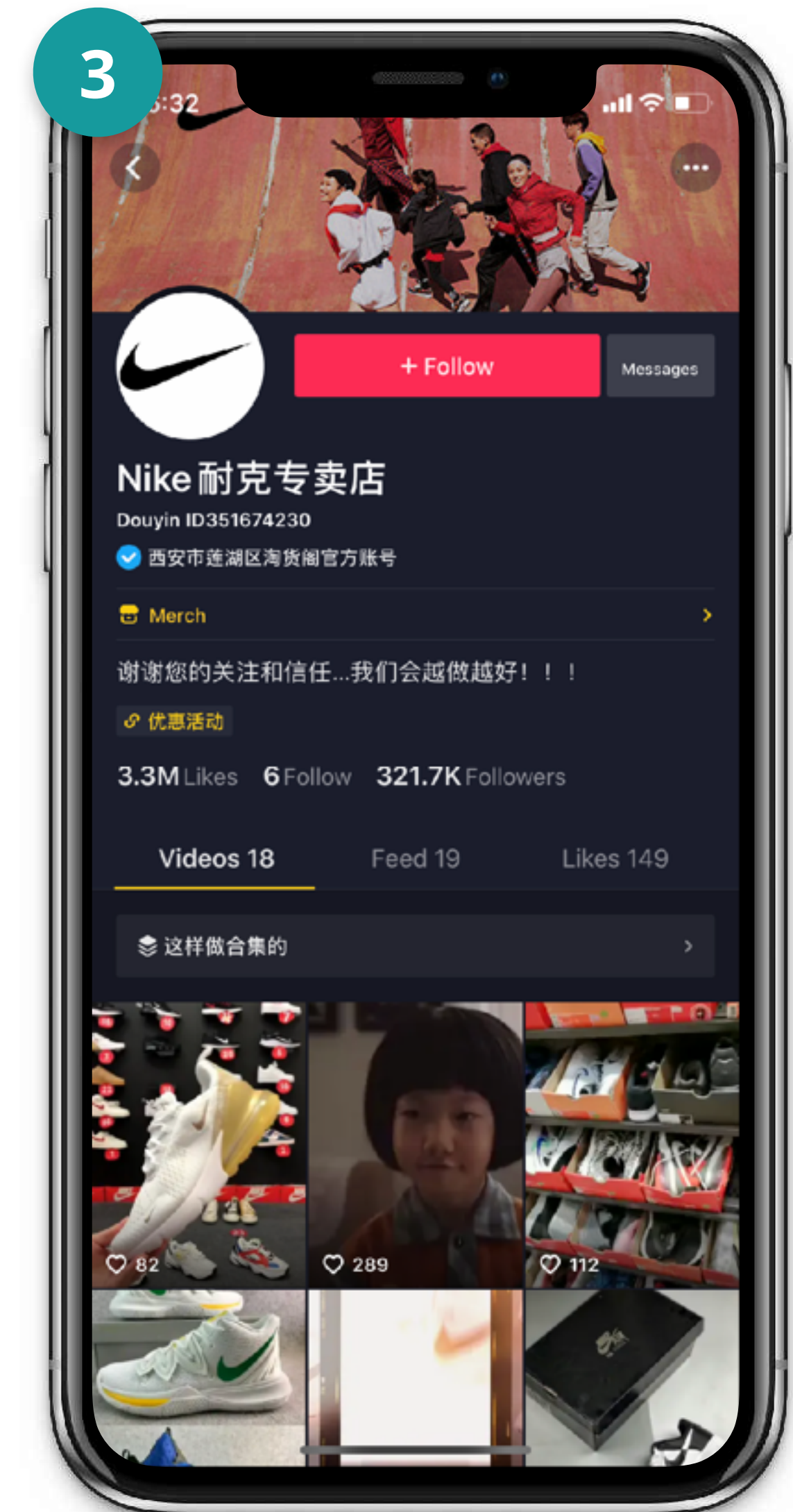
The Douyin feed is composed of an endless stream of short videos base on the algorism of the preference of the user.

2 Discover Page

Douyin's Discover Page has content suggestions, trending topics and celebrity ranks, Live shows and also shops.

3 Brand Profile

Douyin enterprise accounts have a blue tick under the logo indicating the account is an official verified brand. Users can also find brand related sales activities and hashtags.

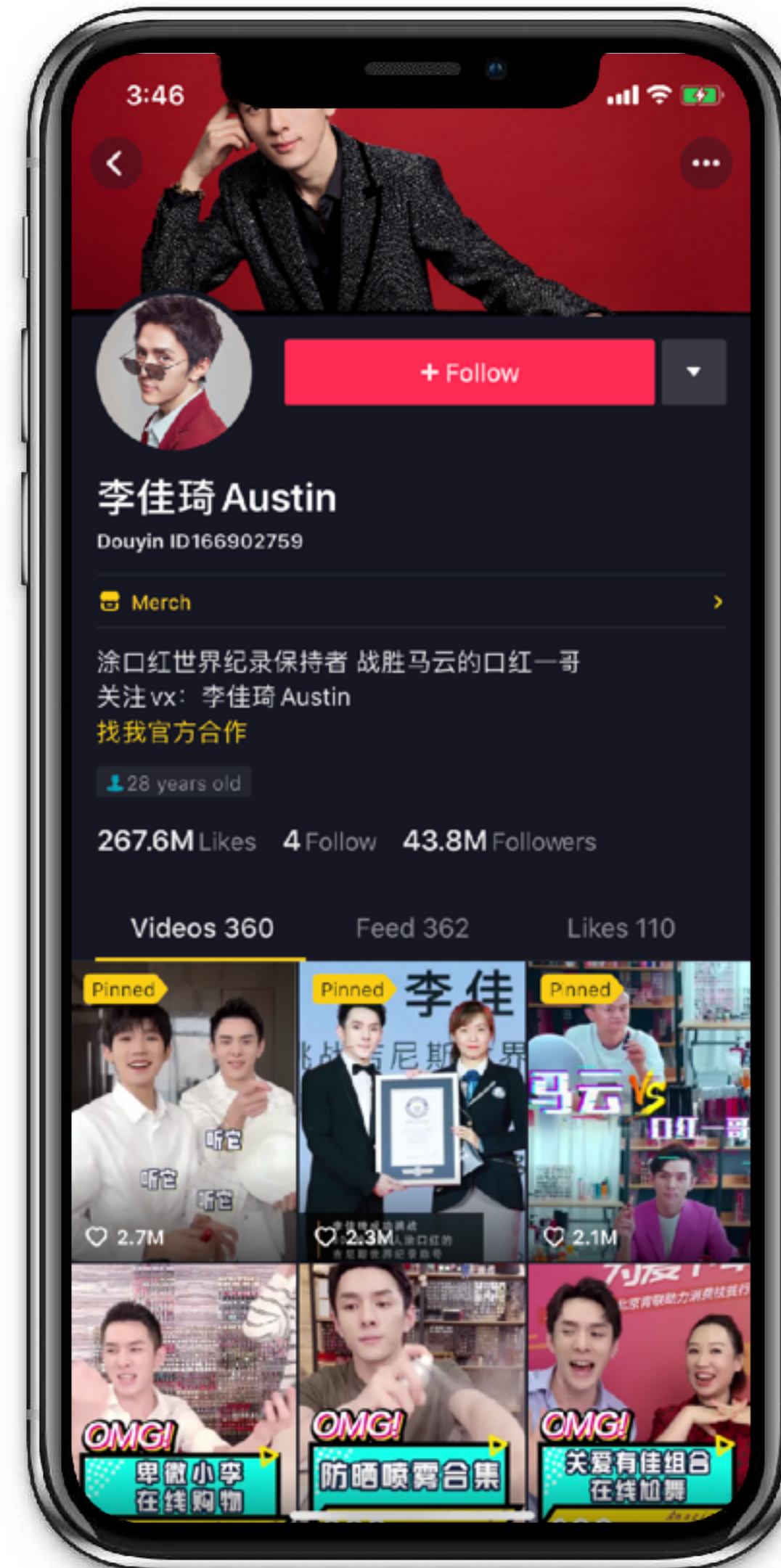


K O L M A R K E T I N G

Douyin offers multiple new marketing opportunities. Brands can create partnerships with Douyin KOLs and sell their products through videos or livestreams.

For instance, Austin Li, the 'Lipstick King' followed by more than 43.8M people, succeeded in selling 15k lipsticks in 5 minutes.

For 2018 Singles Day, he competed with Alibaba founder, Jack Ma, in a livestream to sell lipstick. The video was a hit and generated 2M engagement.





CAMPAIGNS ON DOUYIN

American label **Michael Kors** created a hashtag challenge on Douyin in 2017 to promote *The Walk Shanghai*, a digitally-driven experiential event hosted in China.

Campaign mechanics had users uploading their versions of a catwalk with custom filters (or stickers, as they are sometimes also referred to) provided by the brand.

In encouraging users to create their own content with branded assets, not only did Michael Kors manage to stimulate engagement with its brand, it also gained huge amounts of exposure through content sharing.



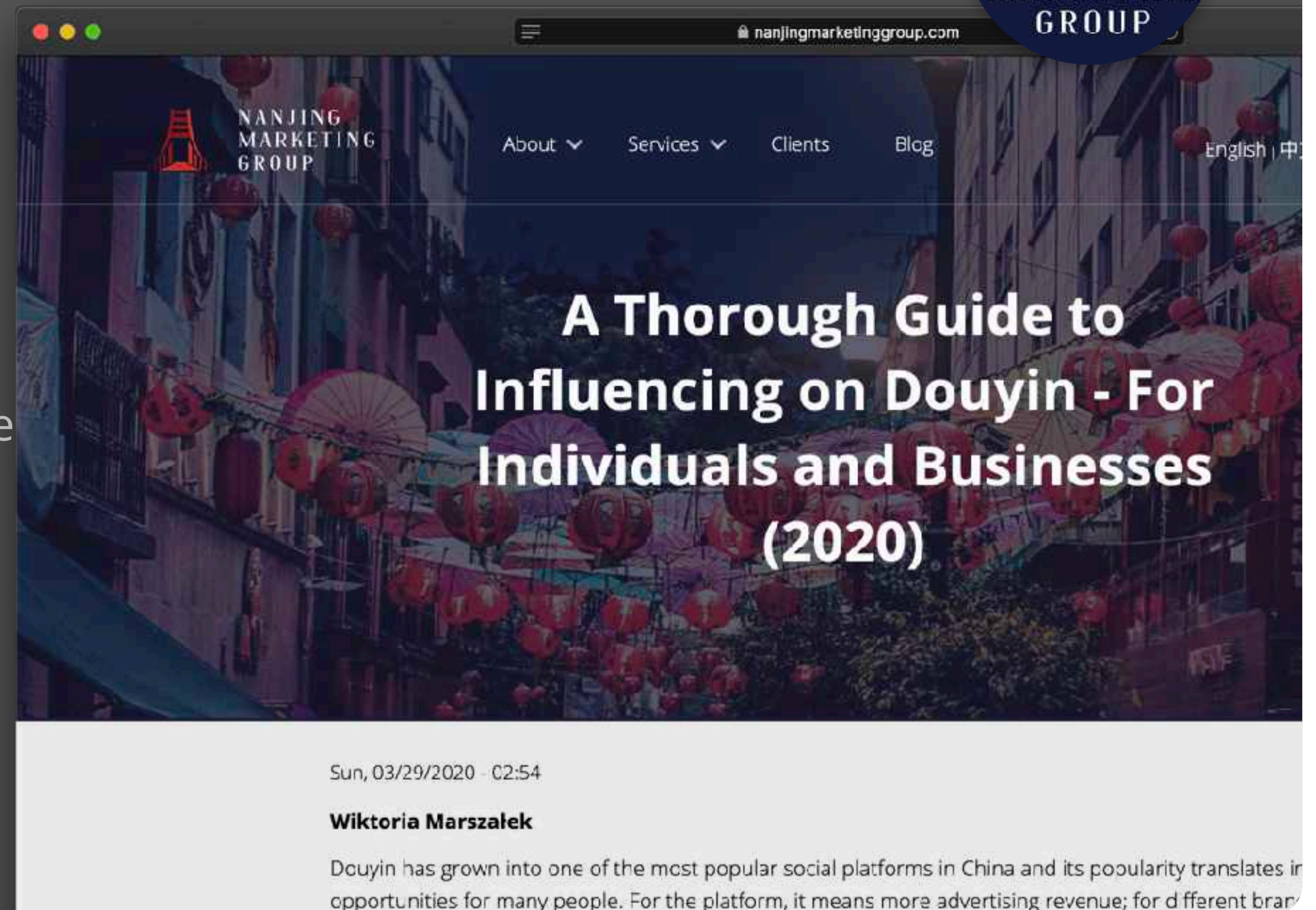


MUST READ GUIDE

A Thorough Guide to Influencing on Douyin

Nanjing Marketing Group wrote a comprehensive guide to understand the power of Douyin.

NanjingMarketingGroup.com/blog/influencers-brands-douyin





E-commerce

THREE APPROACHES TO E-COMMERCE IN CHINA

ONE

Sell Direct

Brands can develop their own website and app like most brands in Europe do. This app is linked to the website so brands have full control over the distribution.

EXAMPLE BRANDS



Zara



H & M



Nike Store

TWO

Marketplaces

Launching a store at one of the major E-commerce platforms in China like Taobao, JD or even Pinduoduo instantly exposes your brand to millions of users and they provide a wide range of tools to help drive sales.

TOP MARKETPLACES



Tmall



JD.com



Pinduoduo

THREE

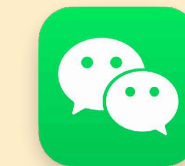
Social Commerce

There's a shift from traditional E-commerce platforms to a new way of doing E-commerce in China known as "Content E-commerce". Brands leverage the power of influencers and drive traffic from social networks.

SOCIAL COMMERCE APPS



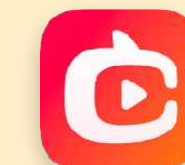
Douyin



WeChat

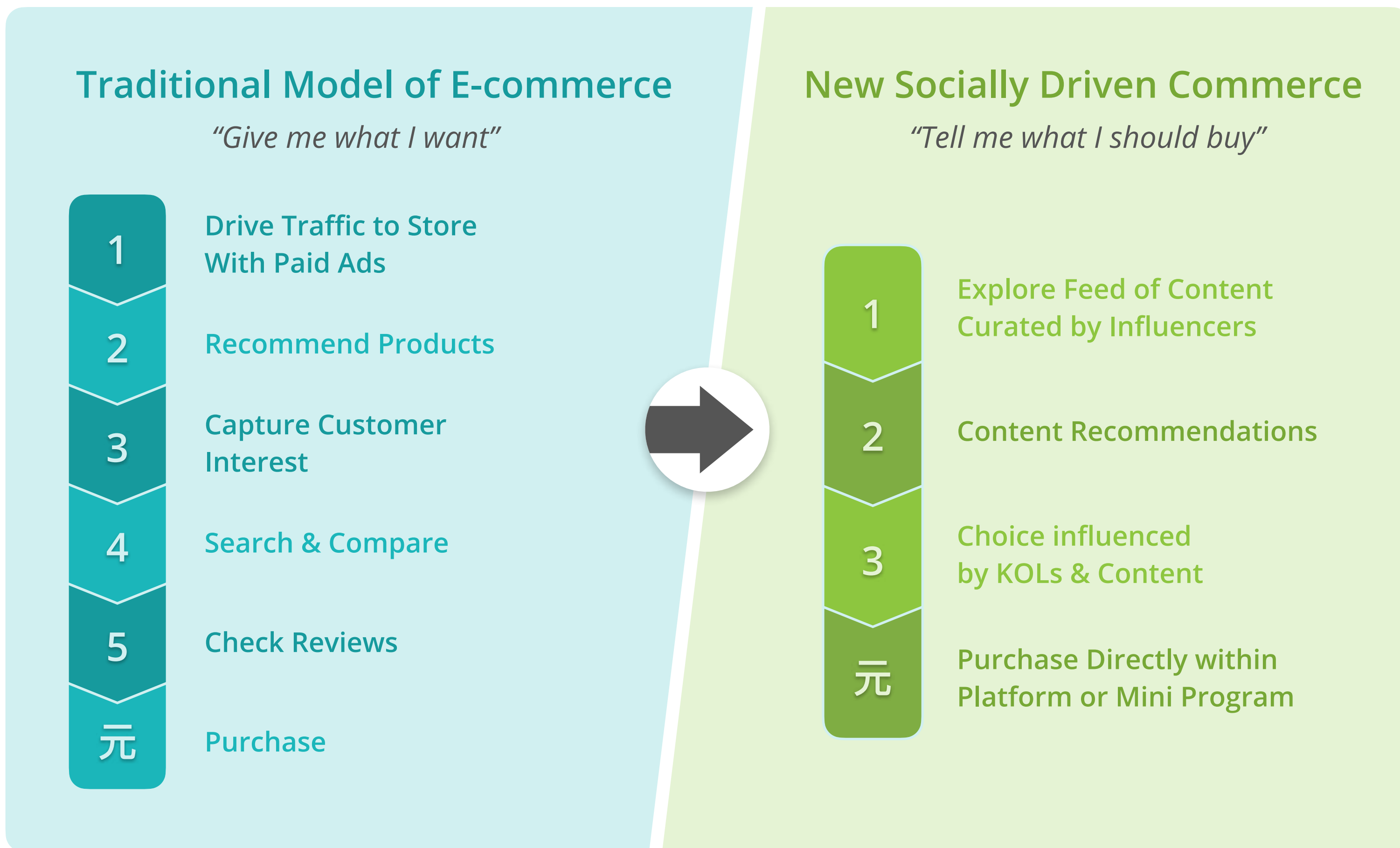


Little Red Book



Taobao Live

CHANGING MODEL OF E-COMMERCE IN CHINA

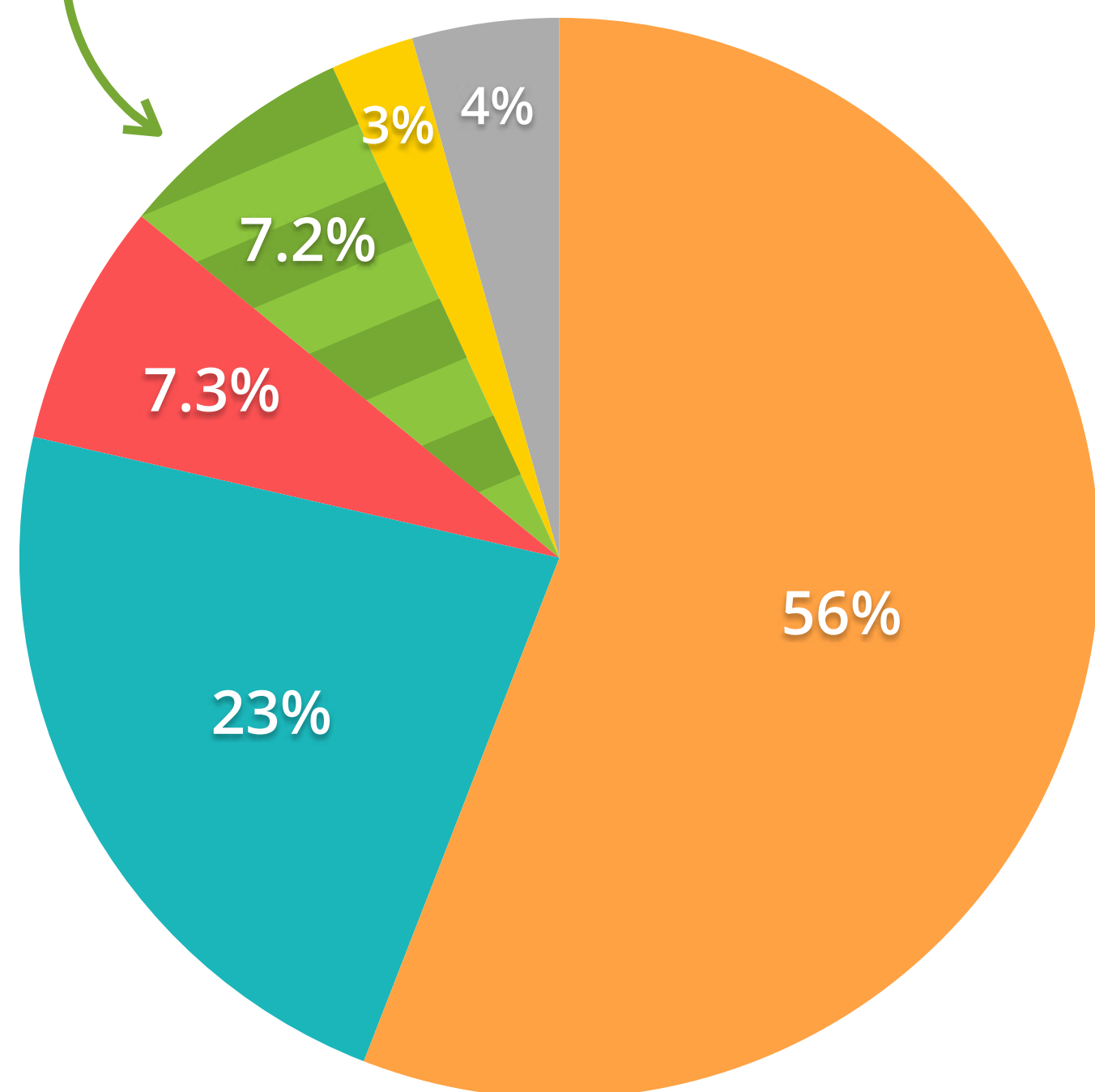


Brands are more likely to develop a mini program than an actual app as mini programs are integrated within social networks like WeChat or Douyin. According to WeChat's official statistics 40% of sales are driven by content.

There's a shift from "Provide what you want" to "Telling you what you should buy". Therefore, content has become an increasingly important part of the consumer journey to drive sales.

BREAKDOWN BY SALES VOLUME (RMB)

It's very difficult to get an accurate figure for total sales volume through WeChat because the stores are all operated by individual brands. This number is just an estimate based on anecdotal sources.



1		Taobao & Tmall	7.2T
2		JD.com	2.9T
3		PinDuoDuo	934B
4		WeChat	921B
5		Suning	320B
		Others	563B

EXPERT OPINION

“It doesn’t matter how big the e-commerce platform is, but whether it’s right for your brand.

If you don’t have sufficient brand awareness, entering marketplaces will only burn \$\$\$.

Think about social media, start small, focus on ROI and be ready to change your plan.”



Jenny Chen
COO
WALK THE CHAT



Taobao

CHINESE NAME

淘宝

tá o bǎ o

Phonetic: tao bao

LAUNCHED

2003

OWNERSHIP



100%

SUMMARY

The World's biggest E-commerce website.

KEY FEATURES

- E-commerce
- Live chat
- Advertising

COMPARABLE TO

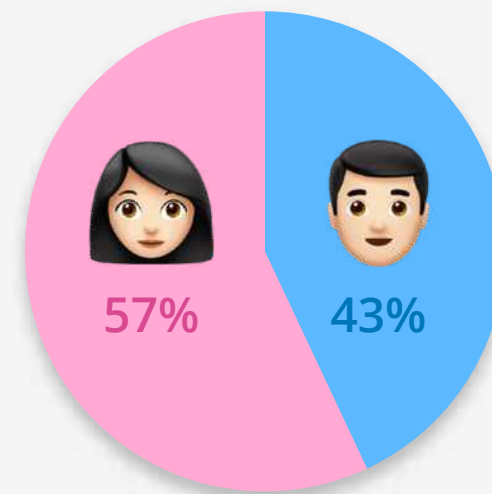


ANNUAL ACTIVE USERS

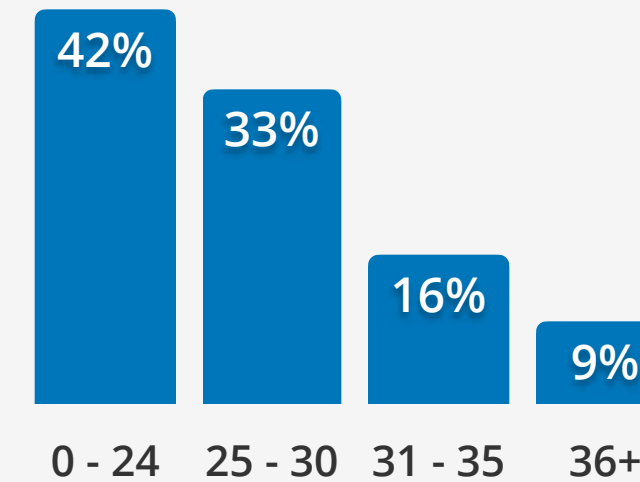
~700 million

(Sept 2019)

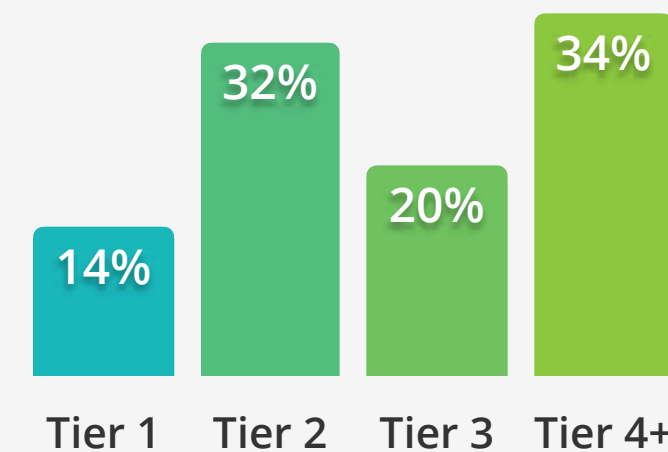
DEMOGRAPHICS



Age Profile



City Tier



SUITABLE FOR

B2C & B2(small)B

USEFUL GUIDE

How to Setup a Taobao Shop

[DaxueConsulting.com/how-to-sell-on-taobao/](https://daxueconsulting.com/how-to-sell-on-taobao/)





Tmall

CHINESE NAME

天猫

tiān māo
Phonetic: tian mao

LAUNCHED

2008

OWNERSHIP



SUMMARY

Tmall.com, formerly Taobao Mall, is a website for B2C online retail, spun off from Taobao.

KEY FEATURES

- E-commerce
- Live-streaming selling

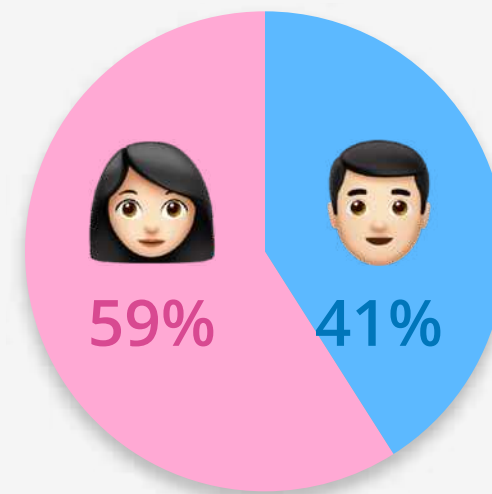
COMPARABLE TO

No direct comparison outside

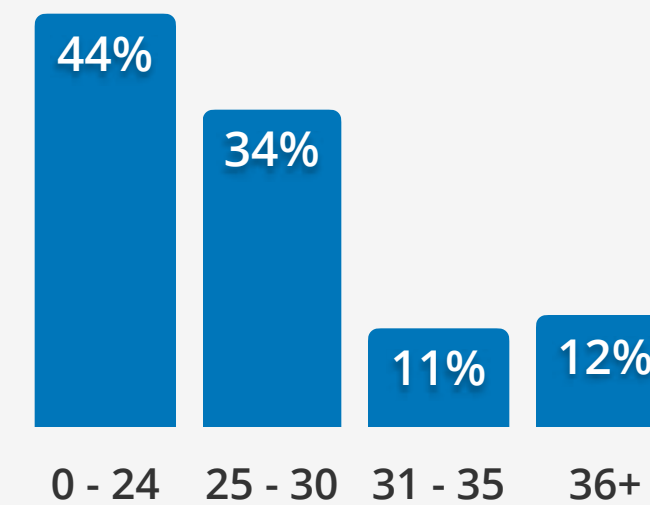
ANNUAL ACTIVE USERS

~700 million
(Sept 2019)

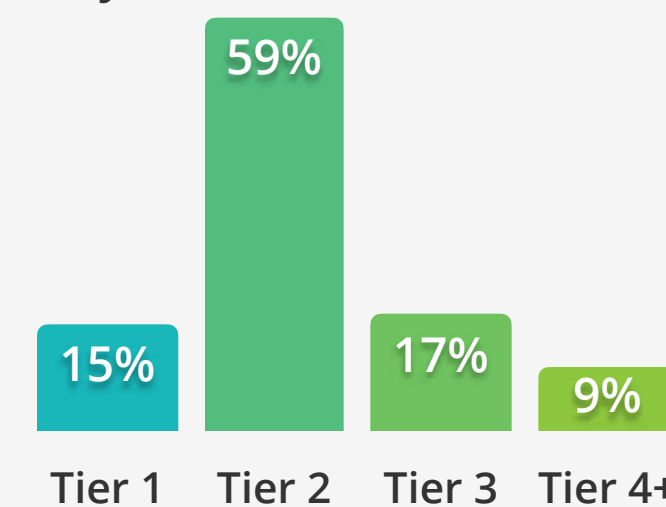
DEMOGRAPHICS



Age Profile



City Tier



SUITABLE FOR

All Brands

OPPORTUNITIES FOR BRANDS

- Sell products
- E-commerce festivals
- Different segments for global brands:
 - Tmall Classic
 - Tmall Global
 - The Luxury Pavilion
- Unique opportunities for brand-building, merchandising, consumer traffic, and sales in the country.



QUICK GLIMPSE

1 Home Page

Tmall's homepage with banner ads and recommendations based on search history.

2 Brand Store

Apple's Official Tmall store, highlighting their latest product.

3 Product Page

Product page of a specific item.

[According to research firm Kung Fu Data](#) as much as 80% of traffic lands directly on this page.



SELLING ON TMALL

Tmall is one of the most important E-commerce platform in China and brands are required to find a **Tmall Partner (TP)** to sell product.

TPs are official partners of Tmall who can help brands to launch a store as well as the day to day management.

Tmall Partners have 3 sources of income:

1. Set up fee
2. Operation fee
3. Sales Commission

The amount and percentage vary according to the Partner.

LAUNCHING ON TMALL IS NOT CHEAP

As a rough example for the first year a brand can expect to pay as much in fees to the TP and the platform as they will make in revenue.

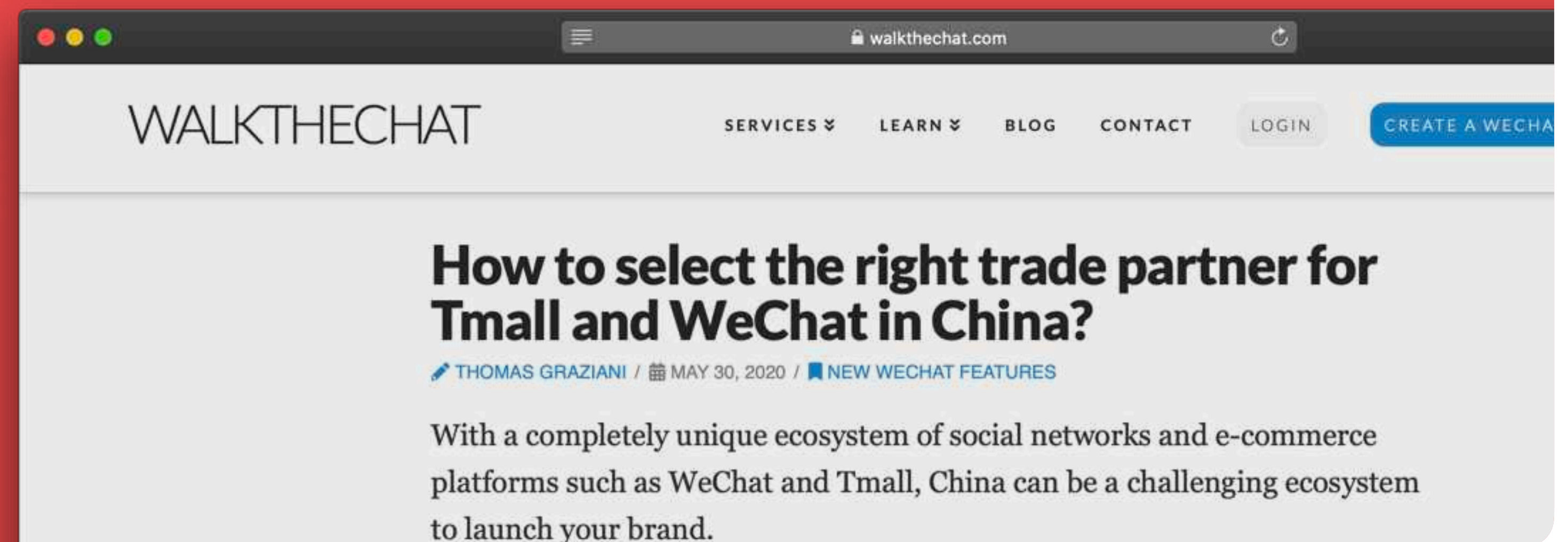


QUICK PRIMER

How to select the right trade partner for Tmall and WeChat in China?

To sell on Tmall, brands need to find and hire a Tmall Partners (TP). Walk The Chat created a quick guide with useful tips for selecting the right company.

walkthechat.com/how-to-select-the-right-trade-partner-for-tmall-and-wechat-in-china/





JD.com

CHINESE NAME

京东

jīng dōng
Phonetic: gin-dong

LAUNCHED

1998

OWNERSHIP

Tencent 腾讯

18%

SUMMARY

AKA Jingdong and formerly called 360buy. One of the two massive B2C online retailers.

KEY FEATURES

E-commerce
Strong in 3C and tech products

COMPARABLE TO



Amazon



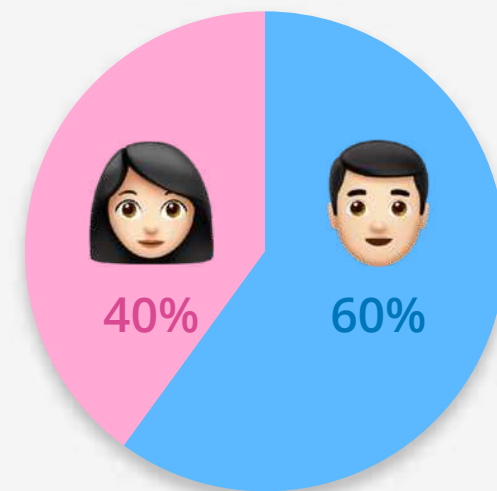
NewEgg

ANNUAL ACTIVE USERS

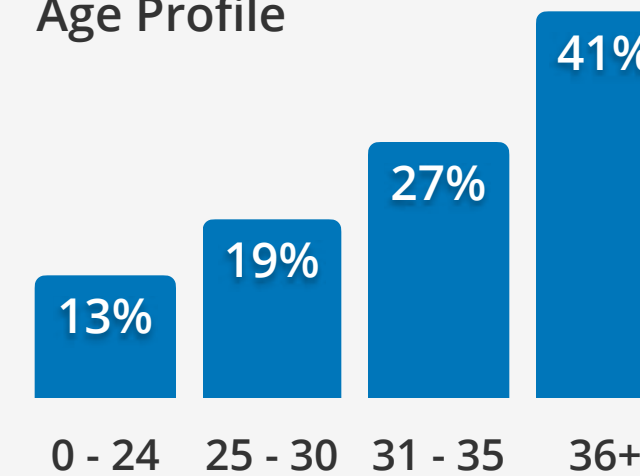
334 million

(Sept 2019)

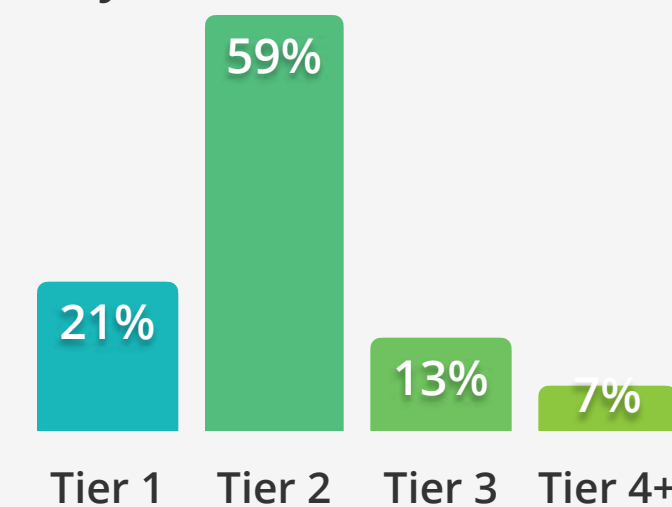
DEMOGRAPHICS



Age Profile



City Tier



SUITABLE FOR

Main focus is Consumer Electronics, but increasingly opportunities for other brands.

OPPORTUNITIES FOR BRANDS

- E-commerce
- Mini Programs
- Product advertising
- Marketing campaigns and e-commerce festivals



Pinduoduo

CHINESE NAME

拼多多

pīn duō duō
Phonetic: pin-duo-duo

LAUNCHED

2015

OWNERSHIP



31%

SUMMARY

A new e-commerce app offering **group buying deals** for users and cheaper goods.

KEY FEATURES

E-commerce group deals.

COMPARABLE TO

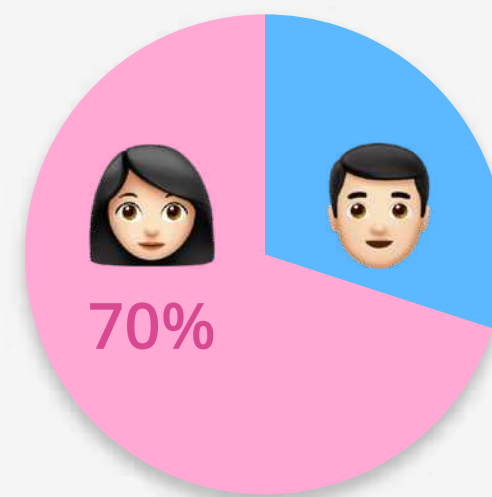


ANNUAL ACTIVE USERS

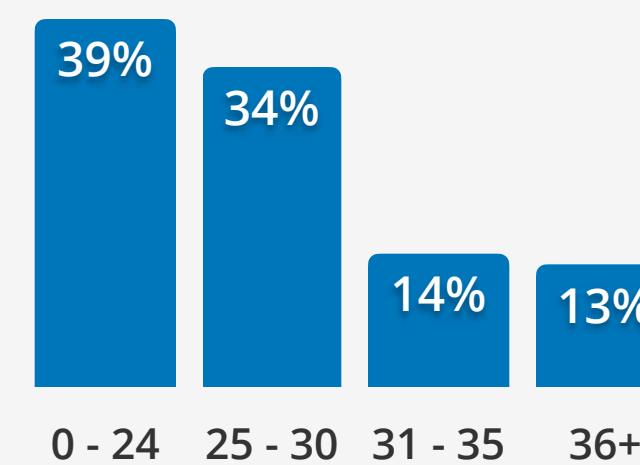
536 million

(Sept 2019)

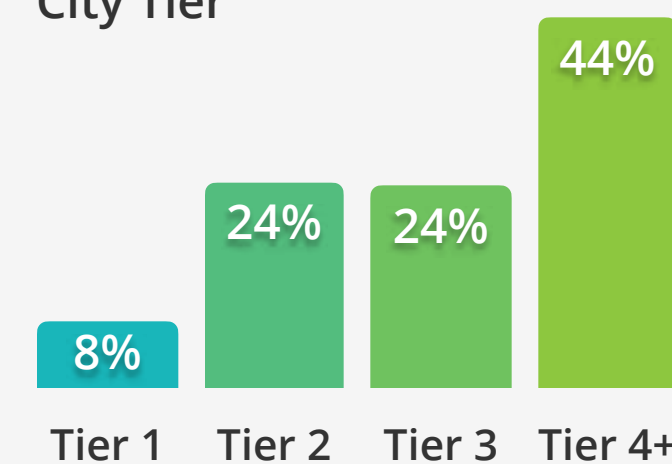
DEMOGRAPHICS



Age Profile



City Tier



SUITABLE FOR

All Brands

OPPORTUNITIES FOR BRANDS

- E-commerce
- Live streaming
- Gamification of the purchasing process

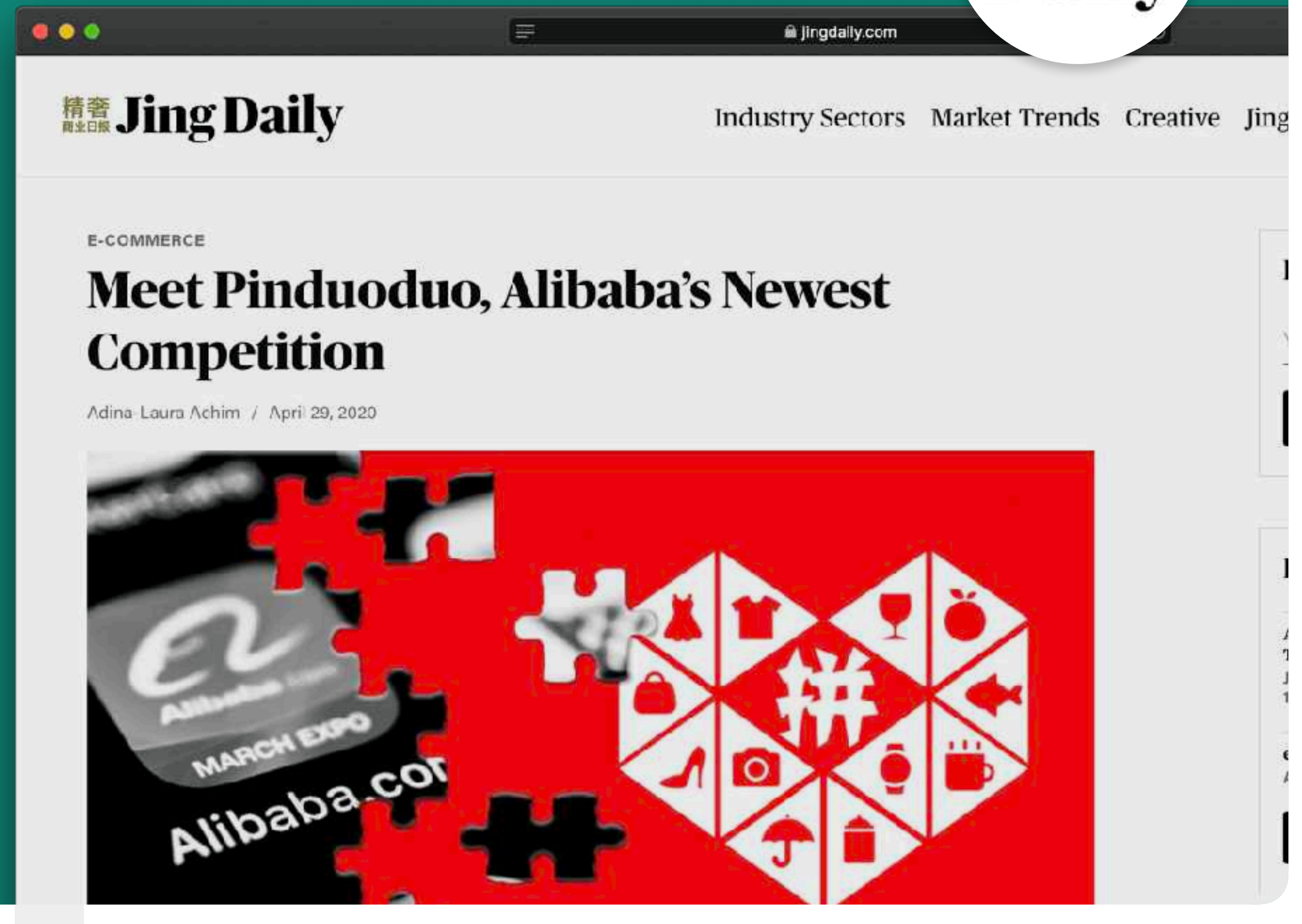


READ & FOLLOW

Meet Pinduoduo, Alibaba's Newest Competition

Understand how Pinduoduo became the third largest e-commerce retailer in China, and its implication on Alibaba's platforms.

jingdaily.com/meet-pinduoduo-alibabas-newest-competition/





LittleRedBook

CHINESE NAME

小红书

xiǎo hóng shū
Phonetic: Shiao-rong-shoe

LAUNCHED

2011

OWNERSHIP



SUMMARY

Social Networking and Cross-border E-commerce.

KEY FEATURES

User generated product reviews & official brand stores.

COMPARABLE TO

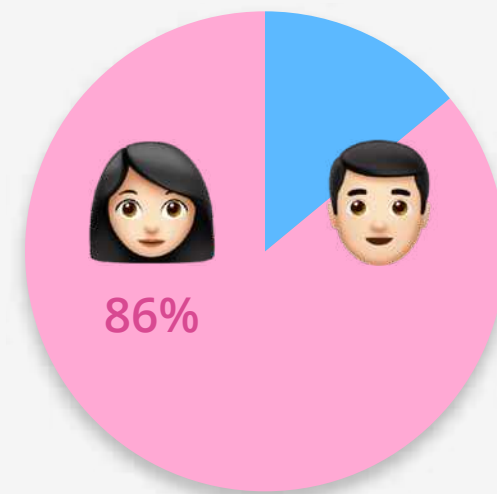


MONTHLY ACTIVE USERS

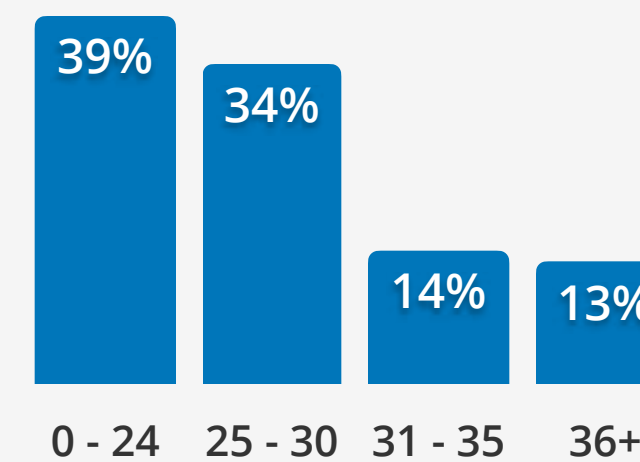
85 million

(June 2019)

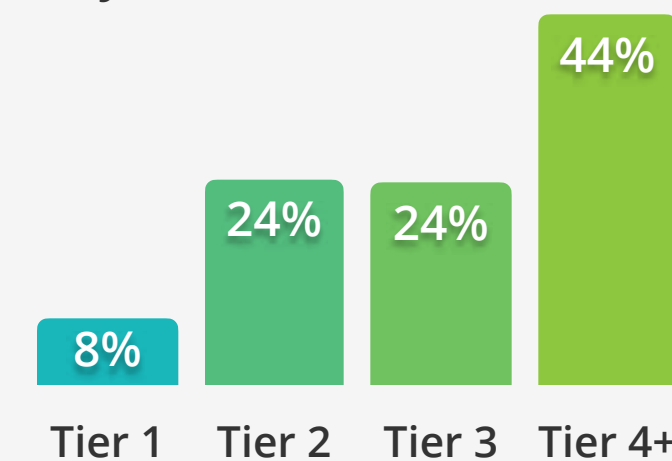
DEMOGRAPHICS



Age Profile



City Tier



SUITABLE FOR

Fashion, Luxury & Lifestyle Brands

OPPORTUNITIES FOR BRANDS

- Open an Official Account to sell products cross border.
- Easy interaction with customers
- Logistics, customer service and marketing support provided fro brands account
- In-app advertisement



QUICK GLIMPSE

1 Red Store

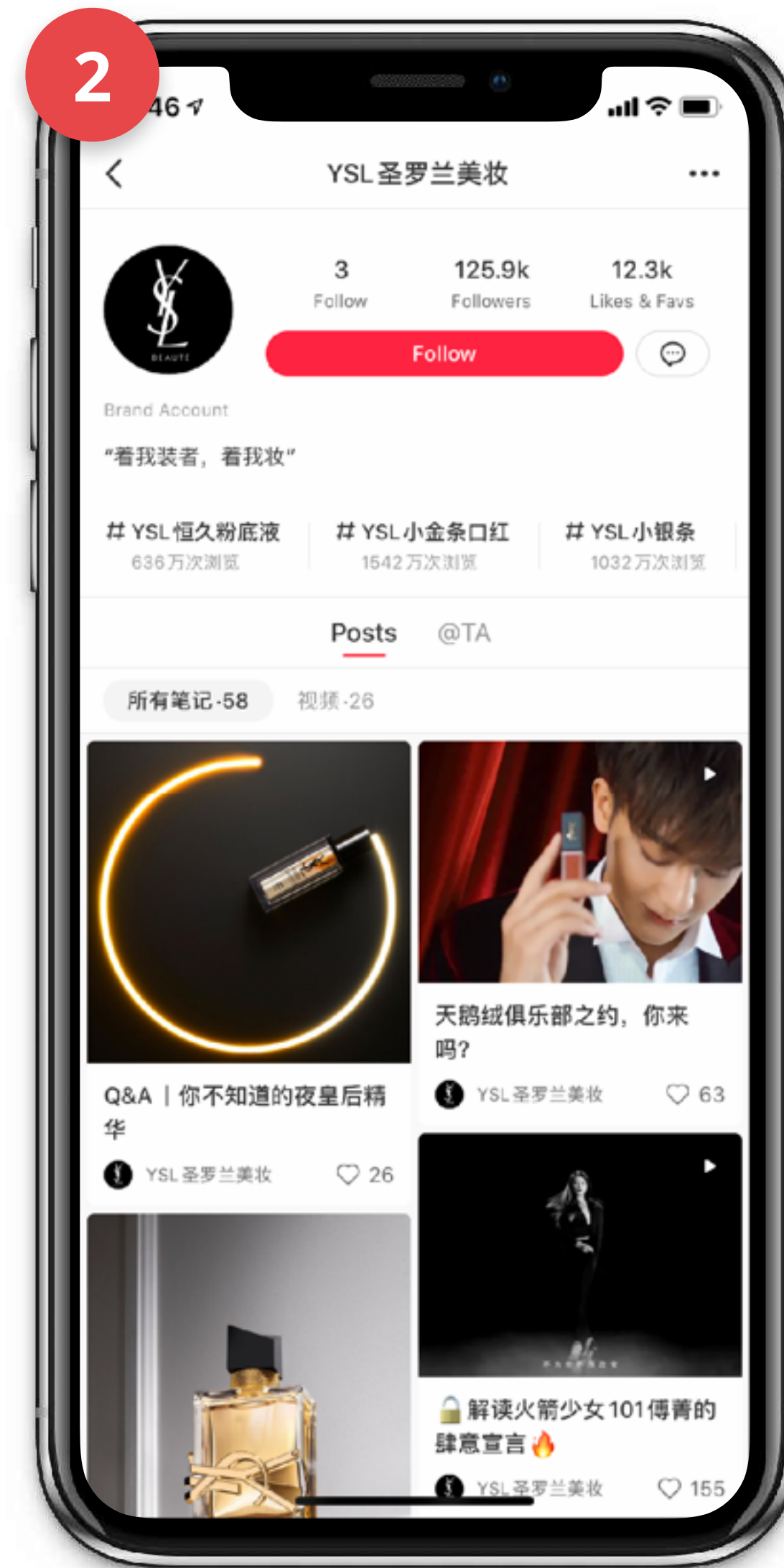
Little Red Book welcome page is similar to any online shopping platform in China, except posts are reviews of brands or users/KOLs.

2 Brand Page

Brands can advertise their products on their Brand page and display their KOL partners etc...

3 Product Note

For every review, you can find information about the product and how to purchase it.



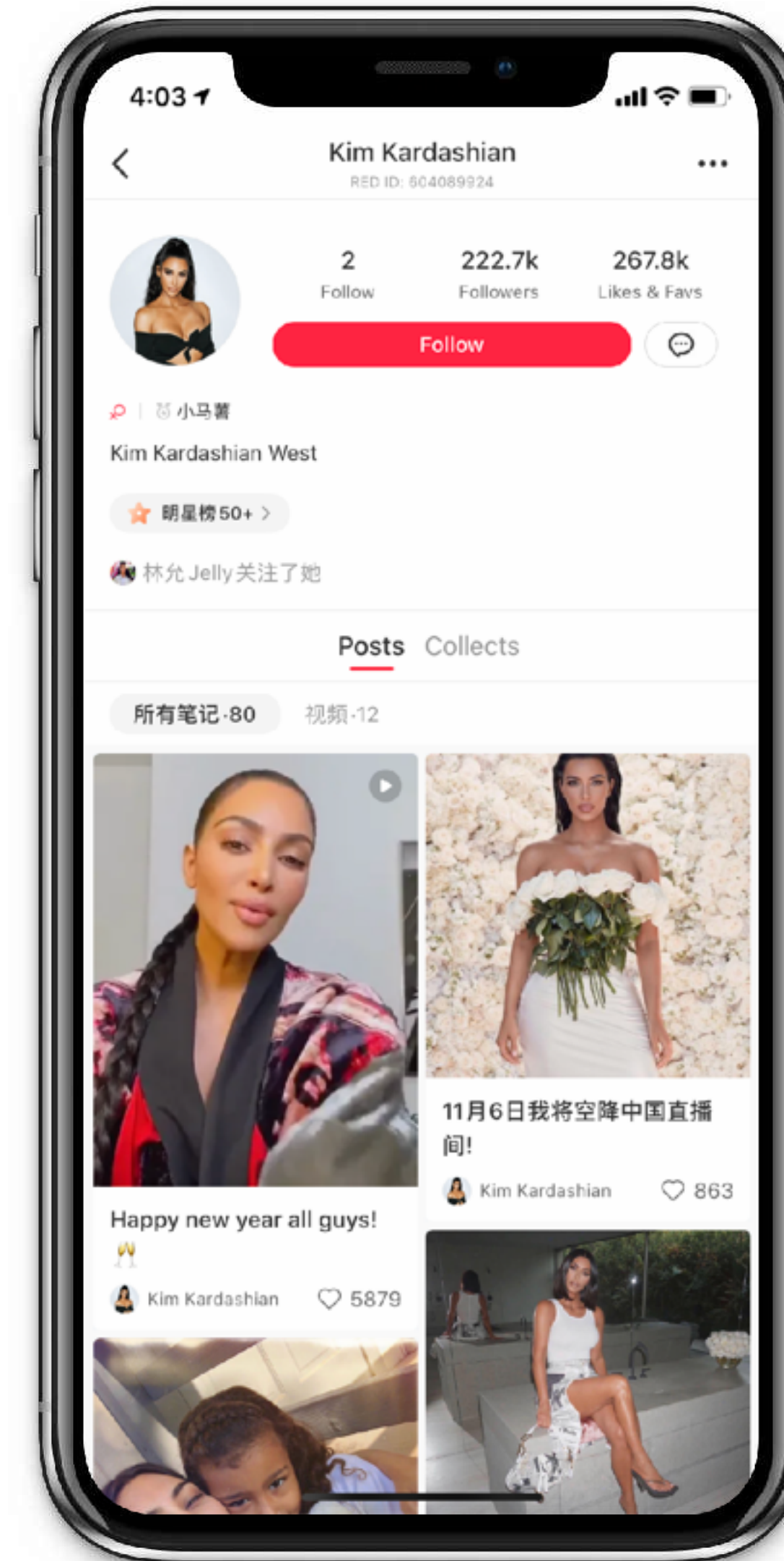
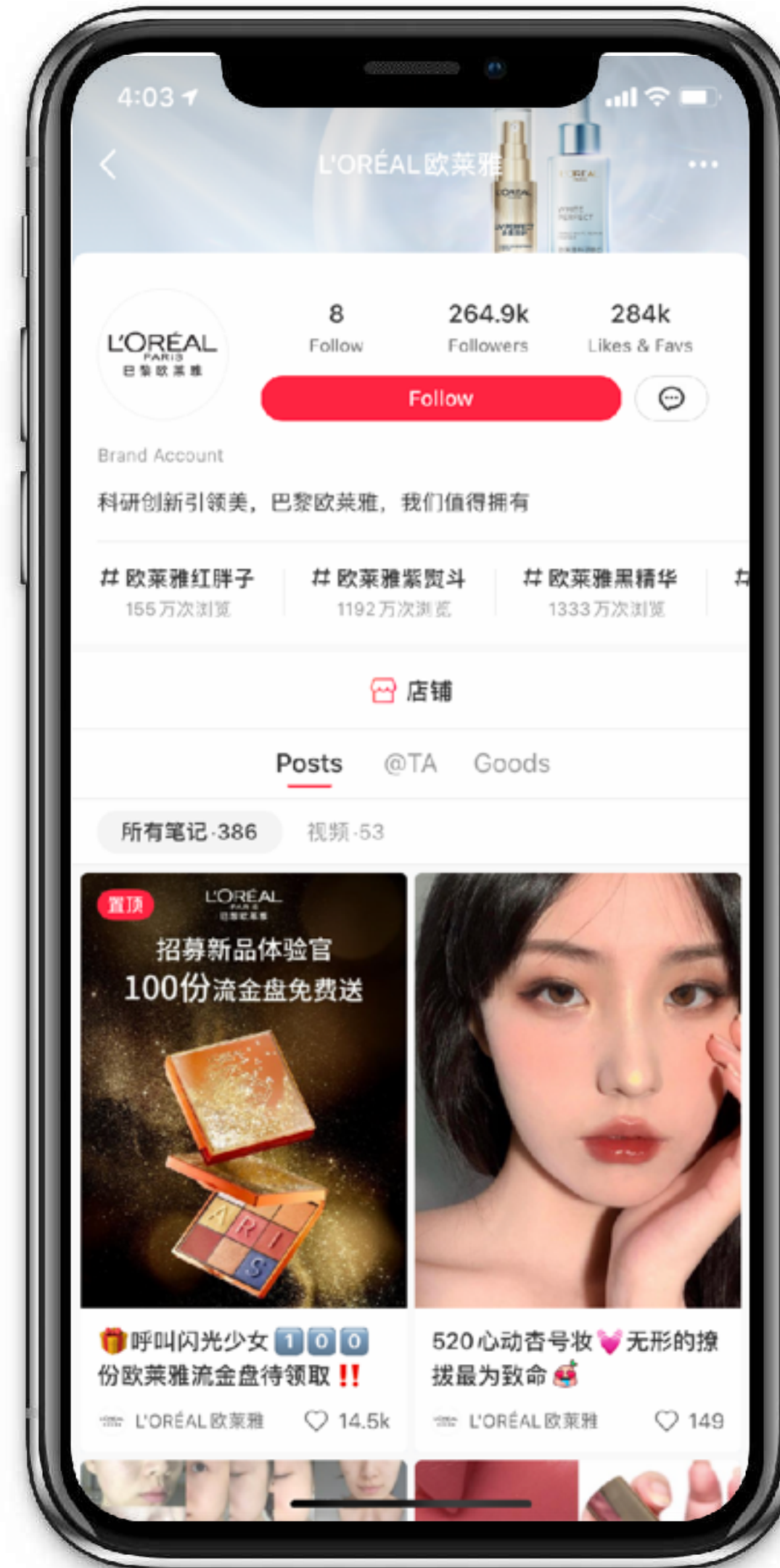


LITTLE RED BOOK BRAND PROFILE

Users are mostly **younger women** who discover and review beauty and health products which are often hard to find in China.

~8,000 **verified brands** featuring products on Little Red Book, including many major global fashion and luxury brands.

Celebrities, KOLs and KOCs sharing their makeup routines to their audience of followers.

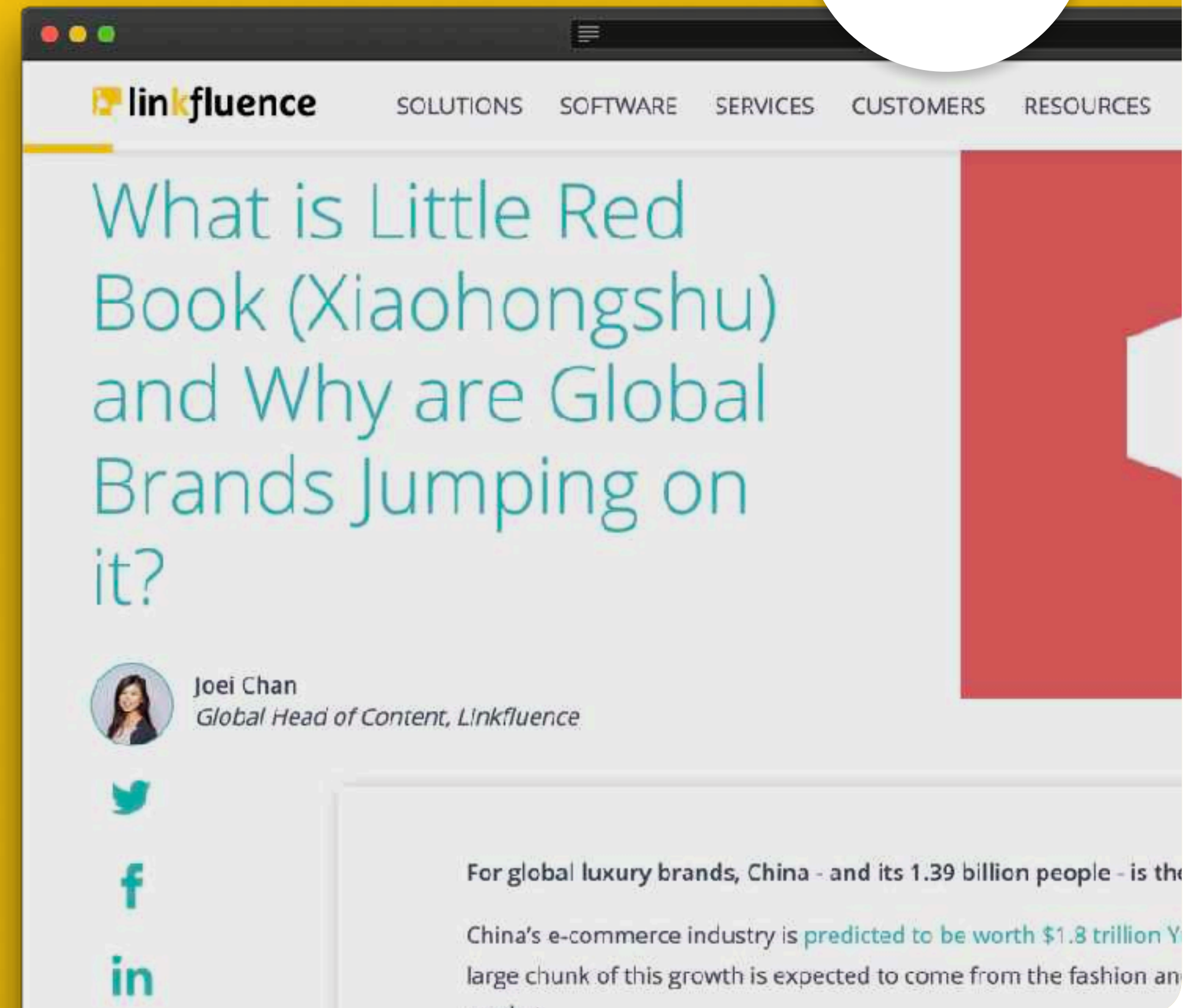


READ & FOLLOW

What is Little Red Book and Why are Global Brands Jumping on it?

Discover the new fast growing e-commerce platform in China and its opportunity for brands through this guide created by Linkfluence.

linkfluence.com/blog/little-red-book-xiaohongshu



WECHAT E-COMMERCE SAAS PLATFORMS

WeChat also integrates e-commerce stores into its application. Brands can therefore push content and sell their product on the same platform.

Some platforms offer the opportunity to create an e-commerce platform directly in WeChat and link it with WeChats payment solution for a better e-commerce conversion rate inside the same app.

The two most important services are Weidian and Youzan.

Tencent 腾讯

?%



WeiDian 微店

WECHAT STORES

80 million

(Nov, 2019)

Weidian is the largest SaaS e-commerce platform on WeChat, providing tools to create e-commerce stores on WeChat for free. With 80 million stores registered, most are small to medium sized companies. from Tier 1 & 2 cities.

Tencent 腾讯

7%



YouZan 有赞

WECHAT STORES

300,000

(Dec, 2019)

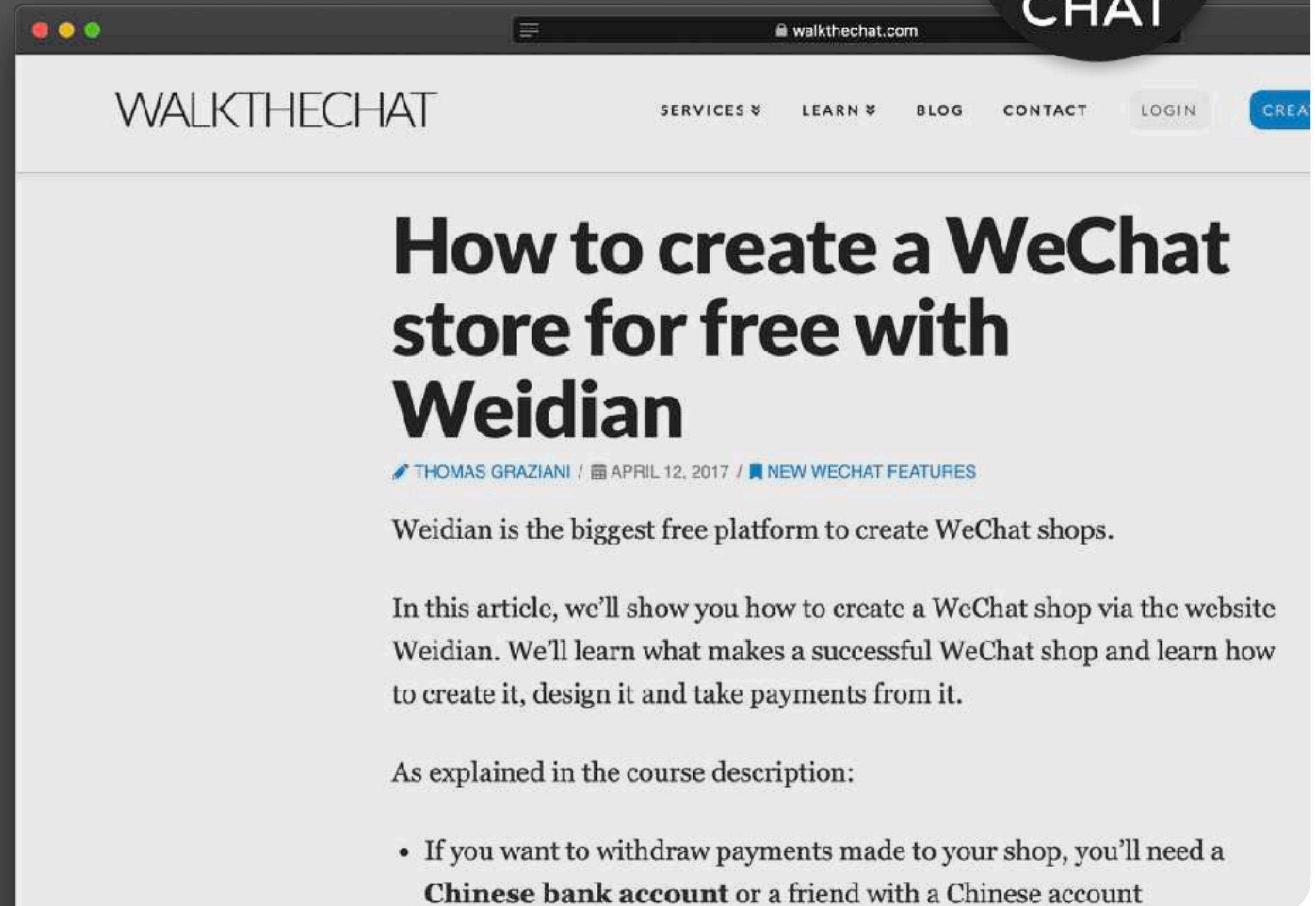
Youzan is the largest provider of WeChat stores to help merchants establish, operate, manage, and promote their WeChat stores. Youzan is serving 300 000 WeChat stores and generated 33 billion RMB in 2018 with a 202% YoY growth.

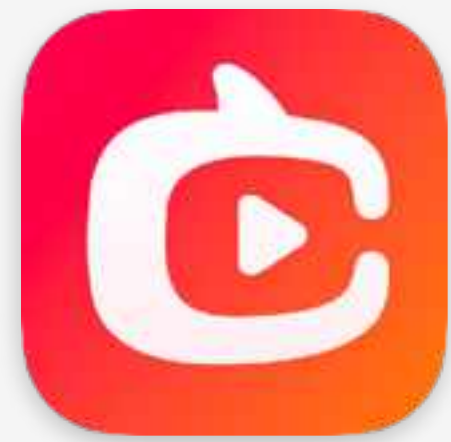


MUST READ GUIDE

How to create a WeChat store for free with Weidian

walkthechat.com/create-wechat-store-free-weidian/





Taobao Live

CHINESE NAME

淘宝直播

táo bǎo zhíbò
Phonetic: tao bao ju-bo

LAUNCHED

2016

OWNERSHIP



SUMMARY

Live streaming
E-commerce platform
within Taobao.

KEY FEATURES

E-commerce & Live-streaming

COMPARABLE TO

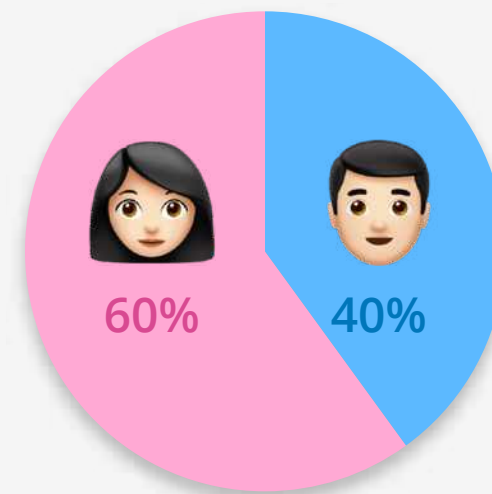


MONTHLY ACTIVE USERS

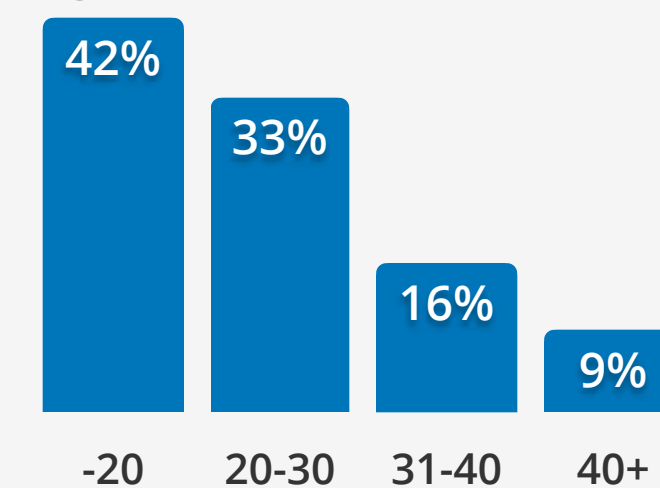
~700 million MAU

(Jan 2020)

DEMOGRAPHICS



Age Profile



SUITABLE FOR

All Brands

OPPORTUNITIES FOR BRANDS

- Live streaming is the "go-to" option in China.
- Demonstrate product in the liveliest way possible
- Questions and explanations instantly, potentially leading to immediate purchases.

E-COMMERCE FESTIVALS DURING THE YEAR

There is an E-commerce festival almost every two weeks throughout the year.

E-commerce is one of the pillars of China's rapid economic growth; from 138M online shoppers in 2010 to 894M in 2020.

Despite being the #1 market for luxury goods, Chinese consumers are prudent and love a bargain. The trend that started with Alibaba's 11:11 Singles Day festival, has been jumped on by every other E-commerce platform. E-commerce festivals known for their big discounts have become a major way to acquire customers and grow revenue.

In 2019 Alibaba totaled a record 268.4bn RMB (\$38.4bn) with 90% of purchases made on smartphones.

January	February	March	April
25th Chinese New Year	14th Valentine's Day	8th Women's Day	4th Tomb sweeping day 18th 418 - Sunning's Festival 24th Men's Festival
May	June	July	August
20th 520 - Modern Valentine's Day	1st Children's Day 18th 618 Shopping Carnival	6th Little Red Book's Anniversary	18th 818 25th QiXi - Chinese Traditional Valentine's Day
September	October	November	December
1st - 9th 99 Wine Festival	Mid-Autumn festival 1st - 7th National Day & Golden Week	11th 11:11 (Singles Day)	12th Double 12 25th Christmas



Mobile Payments

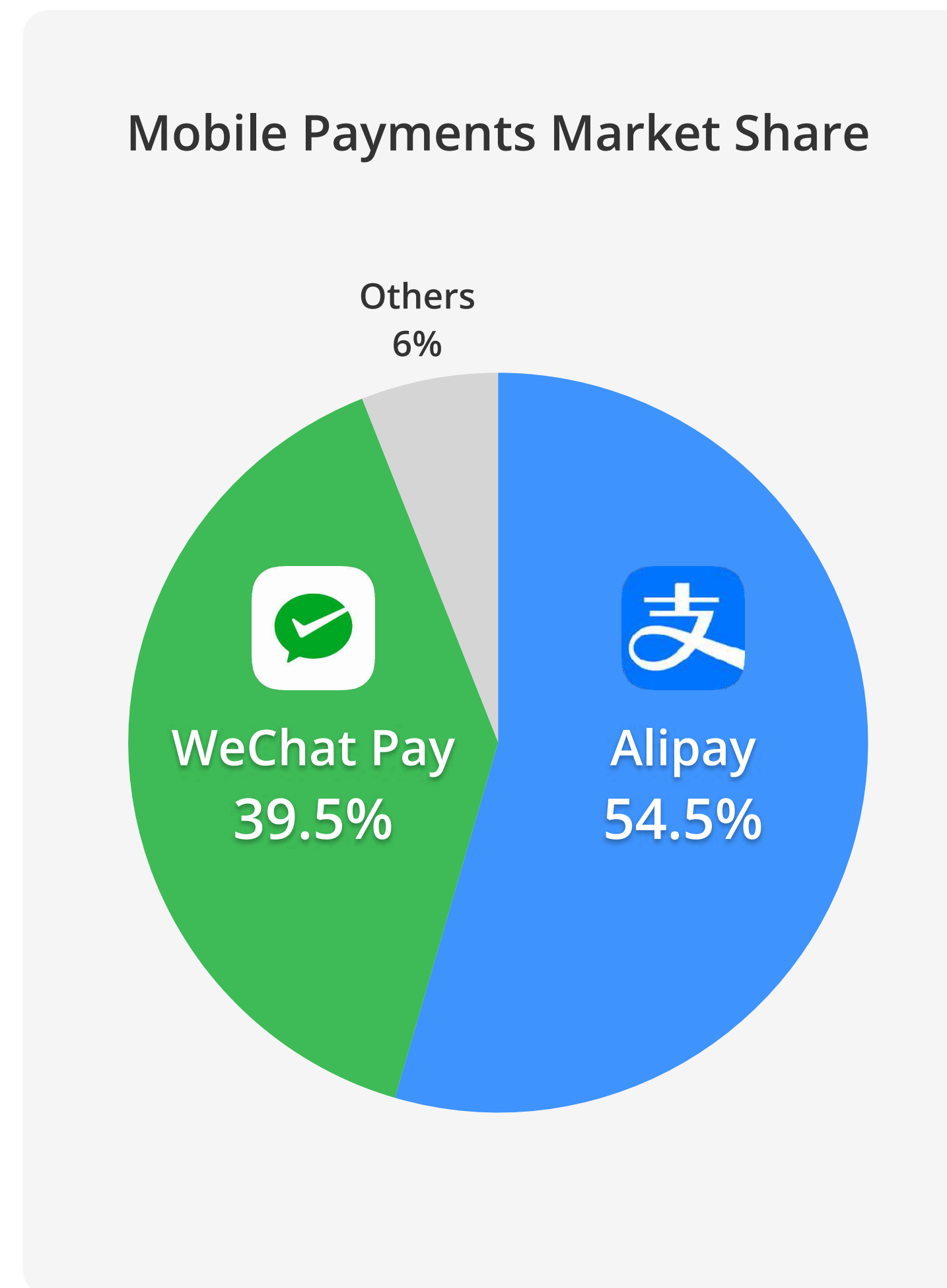
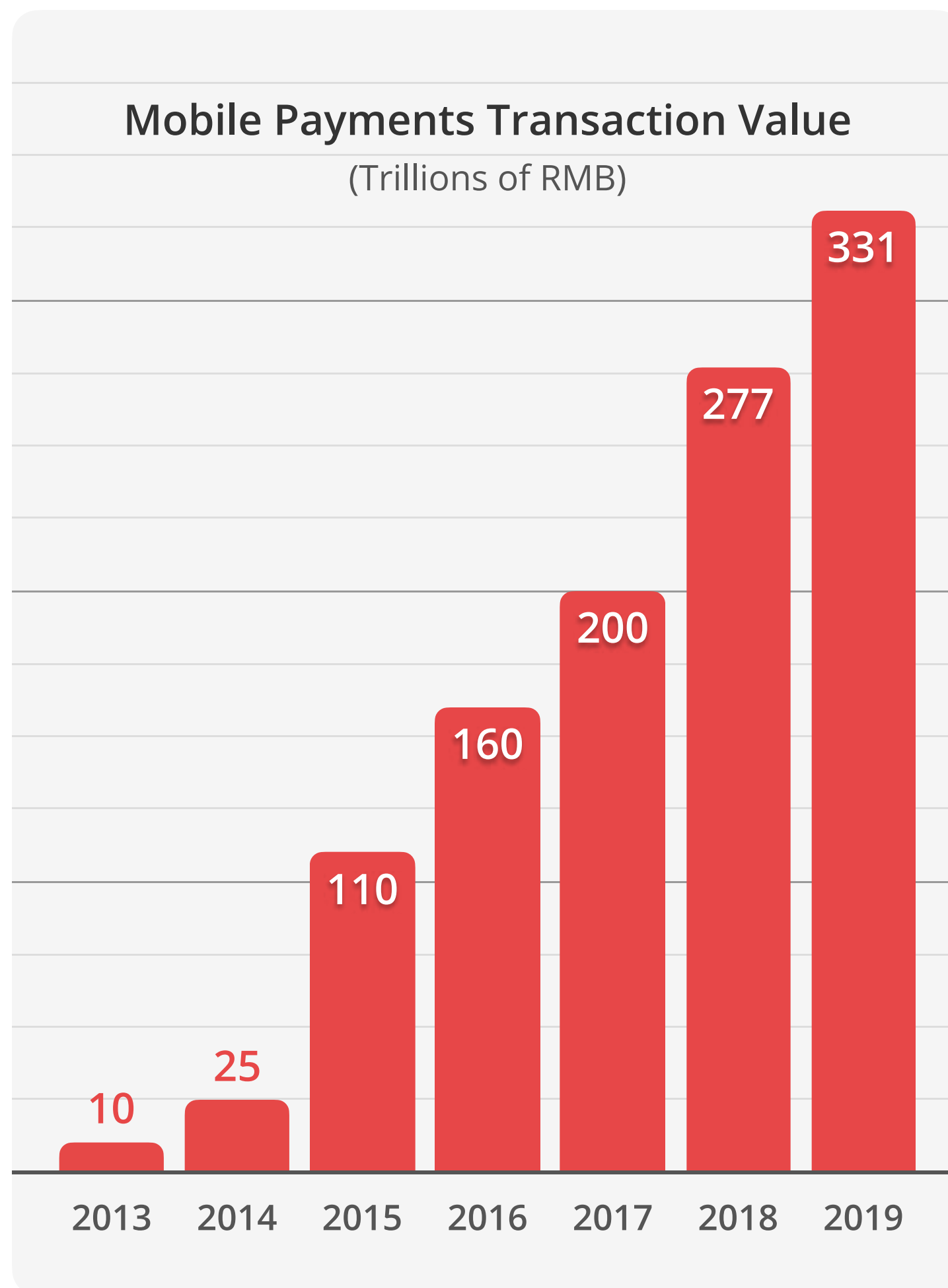
MOBILE PAYMENTS
OVERVIEW

Nobody uses cash in China anymore.

While other countries are still switching from cash to credit cards, China has jumped straight to mobile. Paying with your phone in China has become a way of life. Even back in 2018, around 83% of all payments were made via mobile phone.

Alipay and WeChat Pay dominate the market. Despite the popularity of the iPhone in China, Apple Pay isn't even 1% and even local payment processor UnionPay barely gets a look in.

Similar to PayPal with eBay, Alipay became popular as the payment method used to shop on Taobao. While Alipay is a standalone app, WeChat Pay is embedded right inside WeChat and is more heavily used to pay for services in daily life and split bills in restaurants.





Alipay

CHINESE NAME

支付宝

zhī fù bǎo
Phonetic: Ju-fu-bao

LAUNCHED

2004

OWNERSHIP



SUMMARY

Third-party mobile and online payment platform

COMPARABLE TO

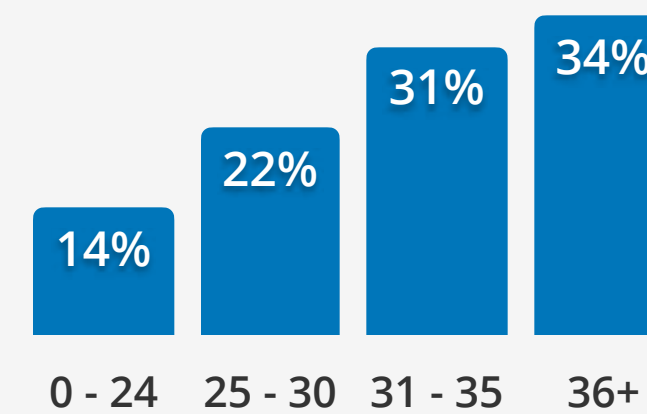
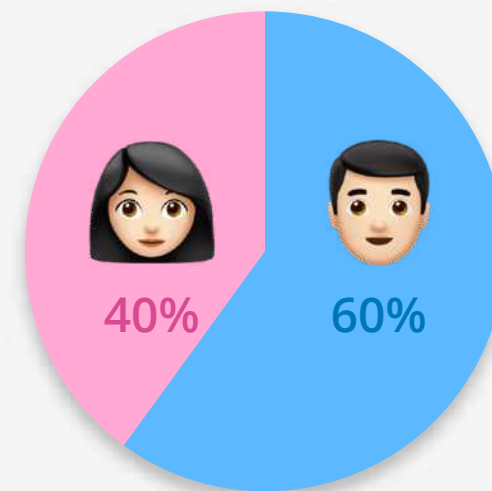


MONTHLY ACTIVE USERS

687 million

(Jan 2020)

DEMOGRAPHICS



OPPORTUNITIES FOR BRANDS

- Mini Programs embedded inside the Alipay app e.g. loyalty programs.
- Accept payments online through your app, or website.
- Content marketing to customers inside Alipay.
- Advertising
It empowers brands to retain control over the customer experience while taking care of payment and delivery.



WeChat Pay

CHINESE NAME

微信支付

wēixìn zhīfù
Phonetic: way-shin ju-fu

LAUNCHED

2011

OWNERSHIP

Tencent 腾讯

100%

SUMMARY

Accept payments from WeChat users

COMPARABLE TO

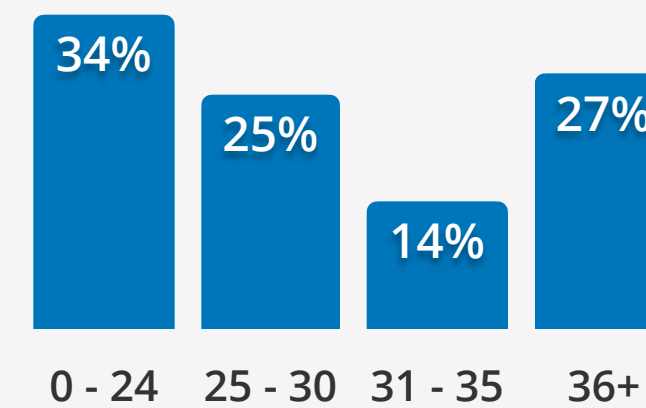
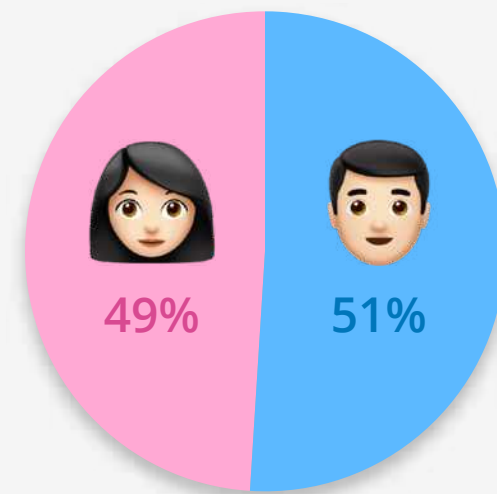


MONTHLY ACTIVE USERS

687 million

(Jan 2020)

DEMOGRAPHICS



OPPORTUNITIES FOR BRANDS

See WeChat pay section (slides 64 - 66).

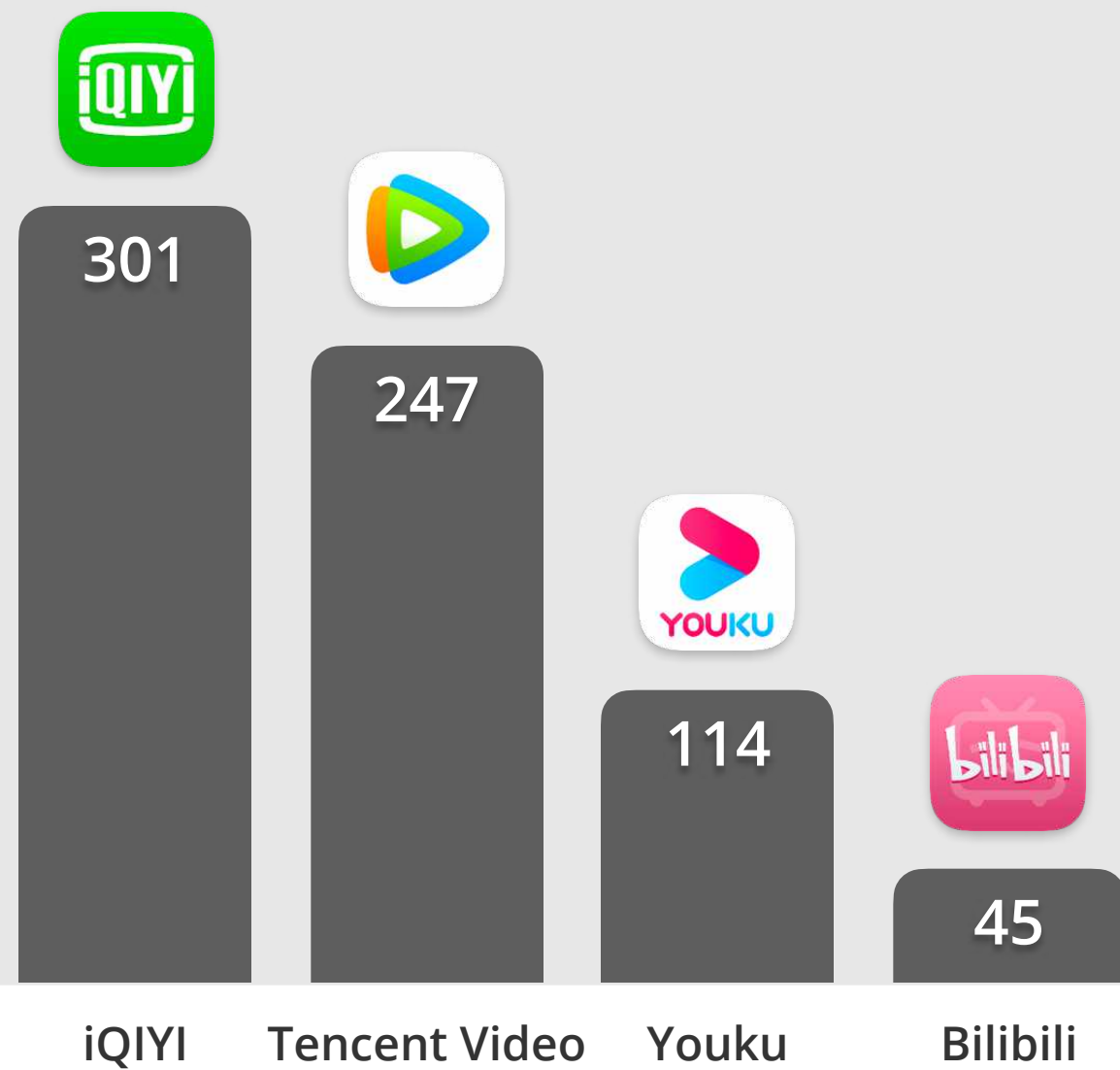


Video & Live Streaming

CHINA VIDEO PLATFORMS OVERVIEW

Streaming Platforms

Each platform is a combination of Netflix & YouTube allowing both user uploaded videos and a subscription service for licensed content.

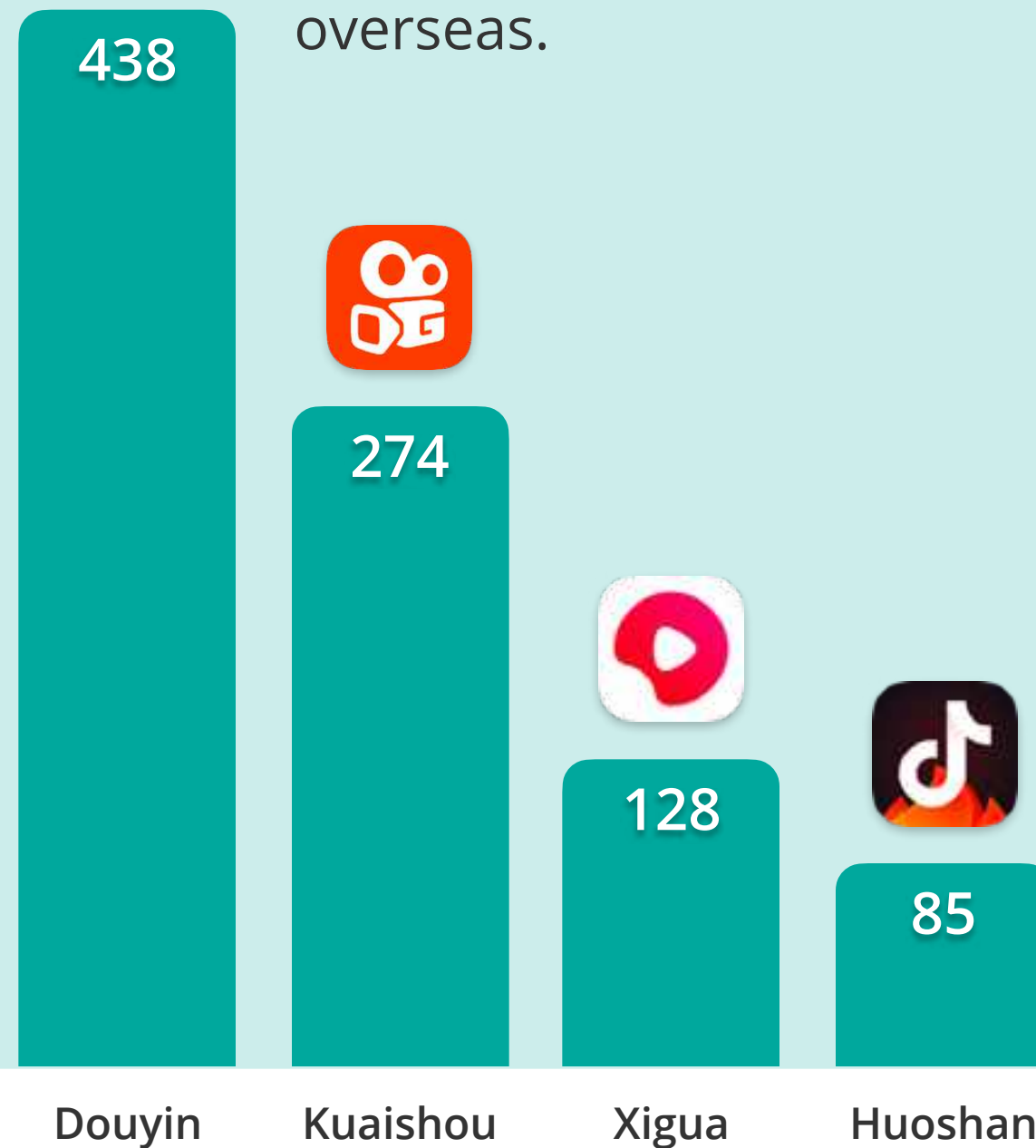


Short Video

The fastest growing category. Douyin is the dominant player and the only



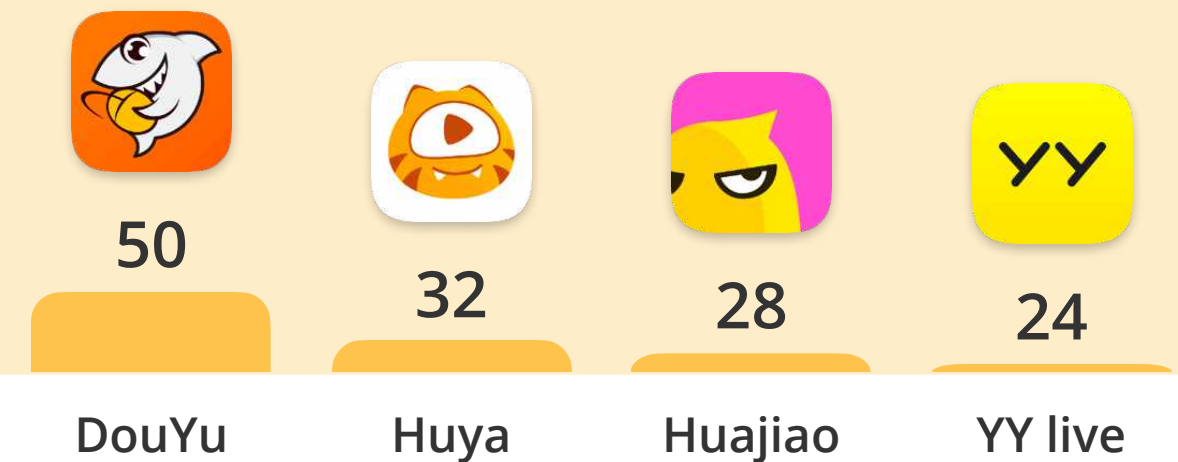
Chinese tech company to achieve mainstream success overseas.



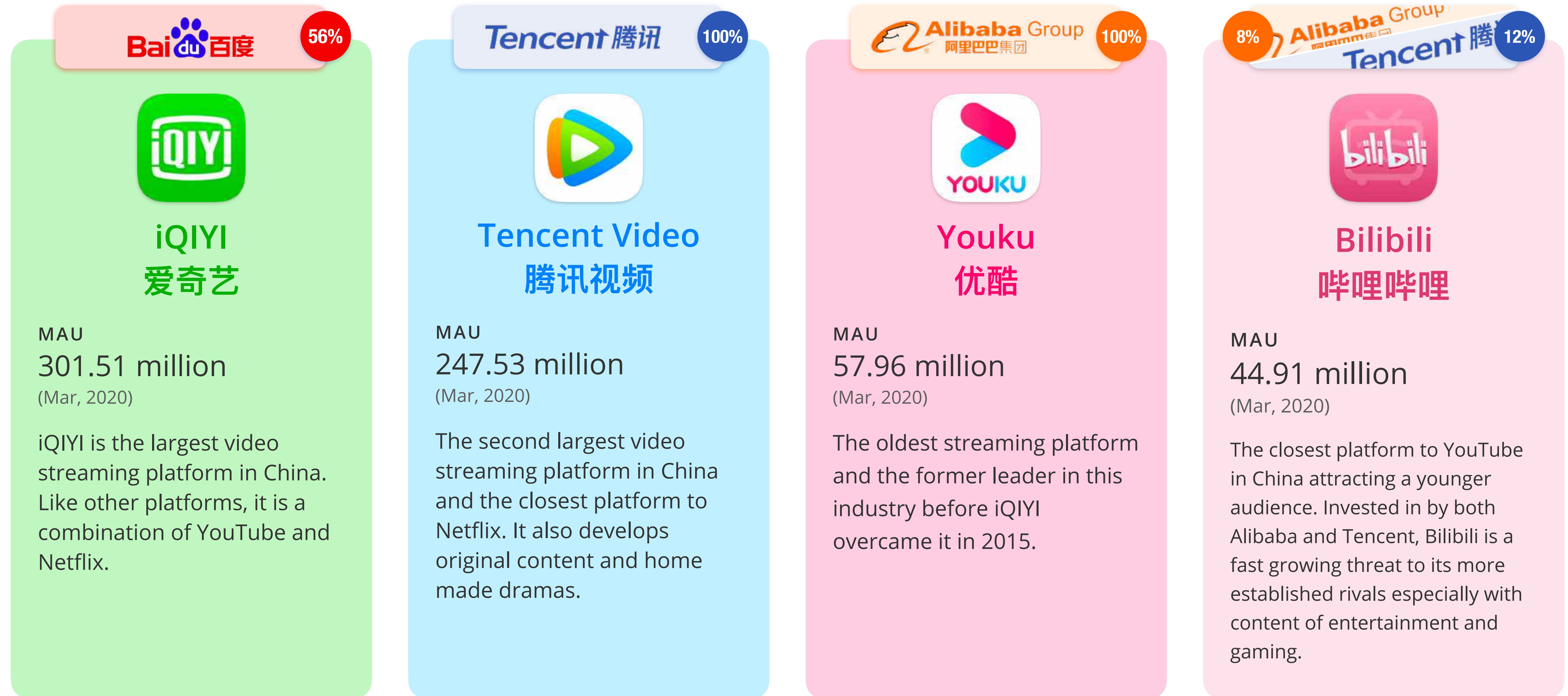
Live Streaming

Main Segments

- E-commerce
- Gaming
- Sports
- Entertainment



STREAMING PLATFORMS



SHORT VIRAL VIDEO APPS



100%



Douyin 抖音

MAU
471.33 million
(Mar, 2020)

- No.1 short video app in China (2 billion downloads worldwide)
- Music and creative video content.
- Great viral potential for B2C brands.
- 80% of the audience is under 30 and from Tier 1 & 2 cities.



Kuaishou 快手

MAU
282.51 million
(Mar, 2020)

- China's 2nd largest short video platform.
- Content more lifestyle oriented.
- Kuaishou users spend more time on the app than Douyin users.
- Most popular citizens in the North of China and in Tier 3, 4+ cities.

EXPERT OPINION

“Douyin & Kuaishou aren't really direct competitors yet. They target different audiences. Both short video players prove the business model: you can monetize great content.”



Yujun Wu
Senior Director
Mailman Group

LIVE STREAMING PLATFORMS

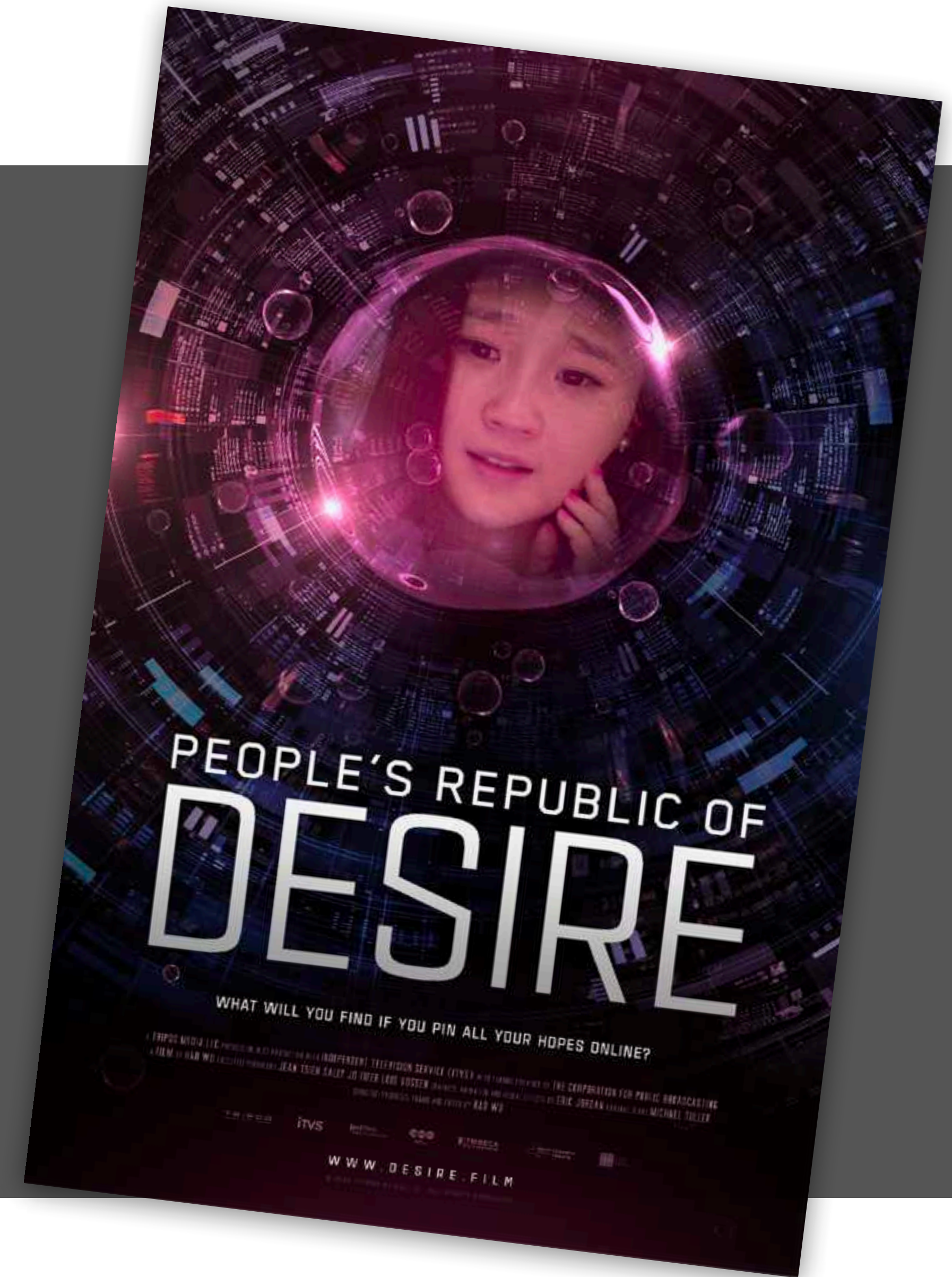
Platform	Ownership	Market Share	MAU (Mar, 2020)	Key Features
Douyu 斗鱼	Tencent 腾讯	38%	26.66 million	<ul style="list-style-type: none">Most important live streaming platform in China"The Chinese Twitch"Founded in 2013
Huya 虎牙	Tencent 腾讯	50%	33.16 million	<ul style="list-style-type: none">The original live section of YY.comBecame independent in 2014Became exclusive partner for League of Legends esports in China in 2018
Huajiao 花椒	PRIVATE		29.29 million	<ul style="list-style-type: none">Has not yet received investment from one of the major playersLifestyle orientedFounded in 2015Original content through contests
YY	NASDAQ:YY		23.72 million	<ul style="list-style-type: none">Created as a social network for gamersInnovative live chat systemLive streaming platform for concerts, fashion and sportsThe live streaming section

WATCH THE DOCUMENTARY

People's Republic of Desire

This film looks at China's live-streaming culture, where hundreds of millions of people log in to watch various hosts sing, tell jokes and hustle to entertain audiences. At first, none of it seems too different from the west, but then the shilling starts, and things get really strange.

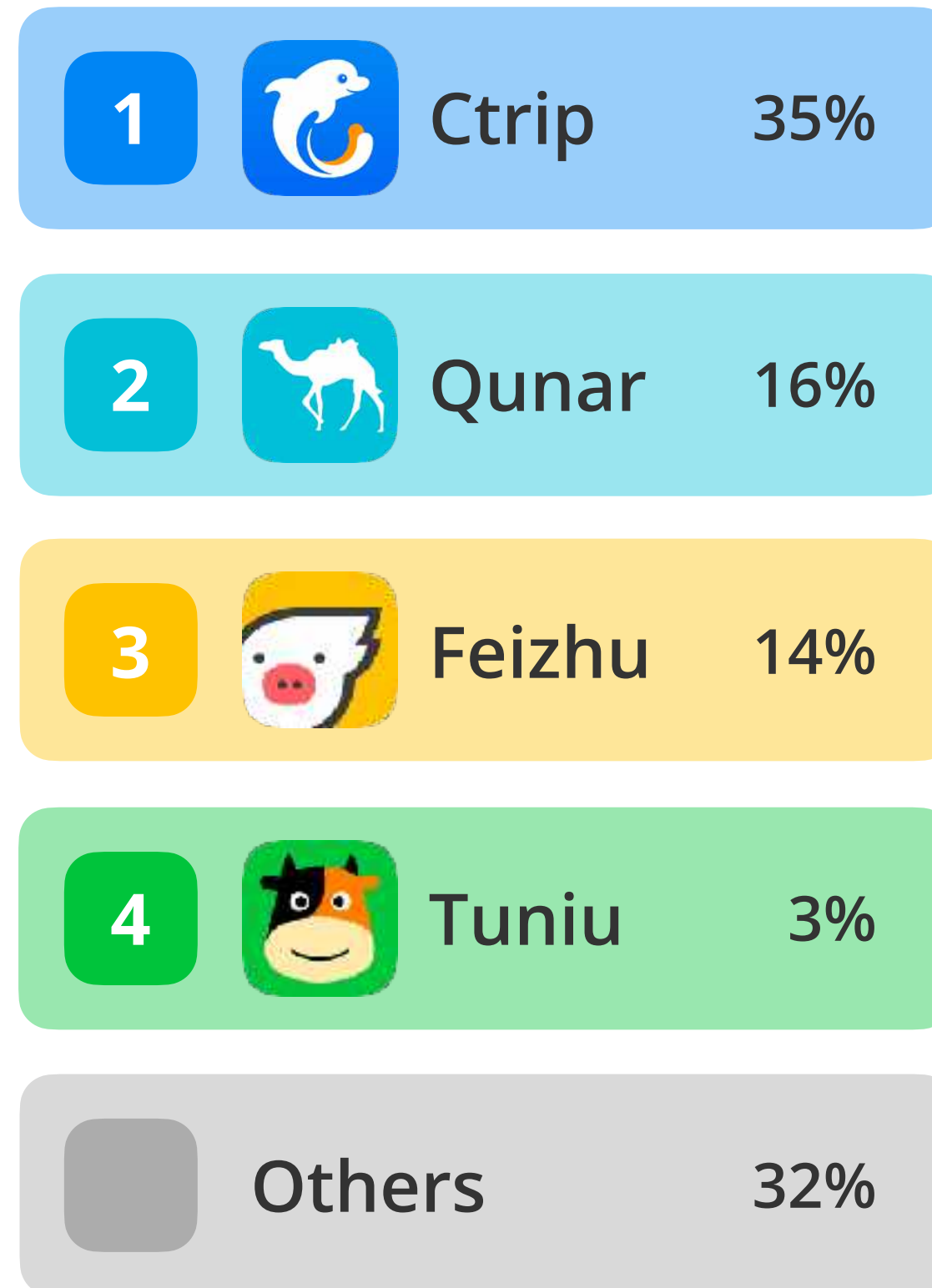
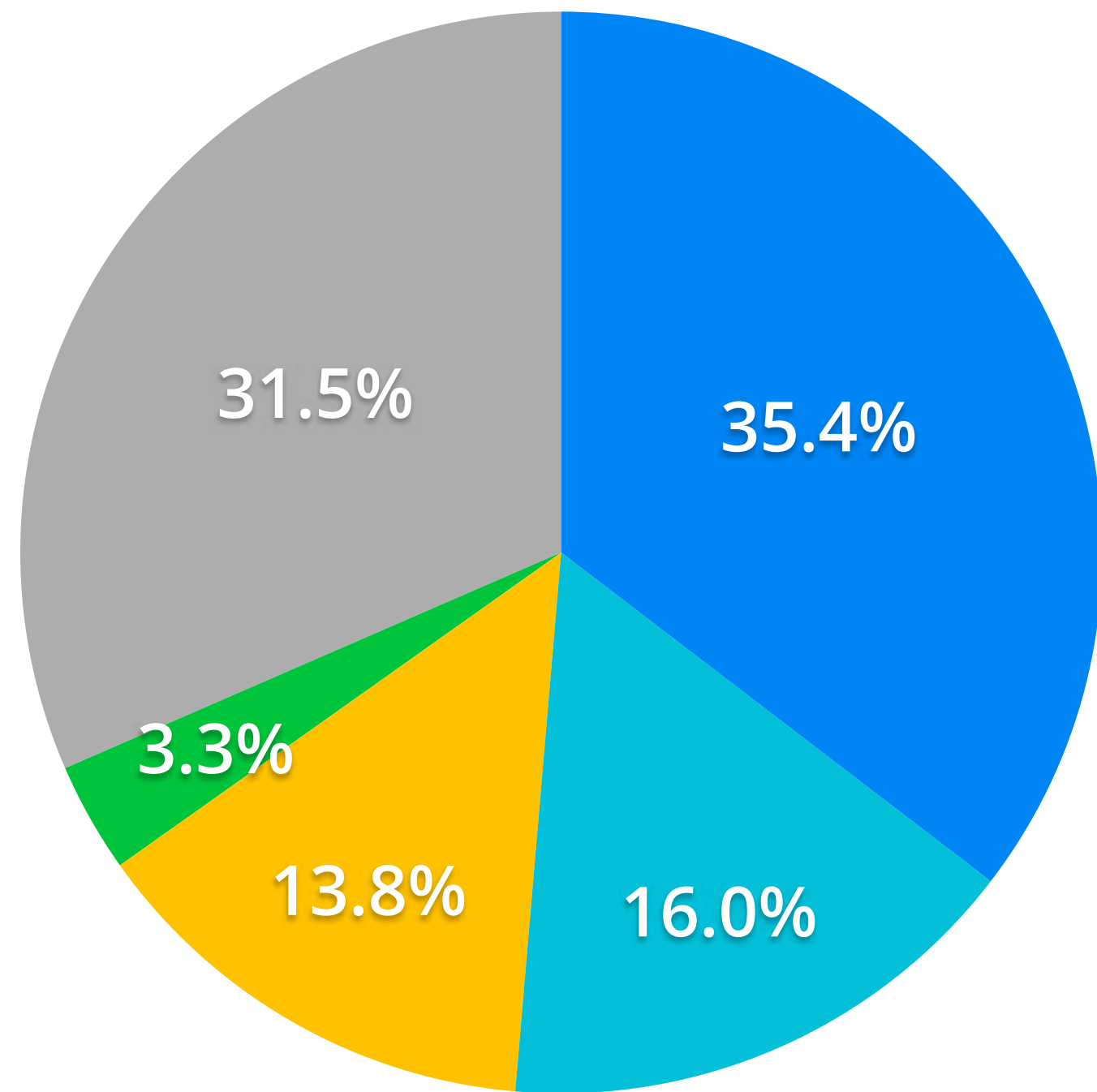
www.desire.film





Travel & Tourism

CHINA ONLINE TRAVEL AGENT MARKET SHARE



EXPERT COMMENT

“In 2019, Chinese travelers took 155 million overseas trips of which 92 million were booked through Online Travel Agencies.

China remains the world’s top spender in international tourism. In the first half of 2019, Chinese travelers spent USD 127 billion with 25% being retail spend.”



Rachel Daydou

Partner & China GM
[Fabernovel](#)

ONLINE TRAVEL AGENCIES



25%



Ctrip 携程

MAU
210 million
(Mar, 2019)

The largest OTA in China and one of the largest worldwide (Ctrip also owns international brands Trip.com and Skyscanner).

Previously invested in by Baidu, Ctrip is now independent and represents 1/3 of the travel market in China.



100%



Qunar 去哪儿

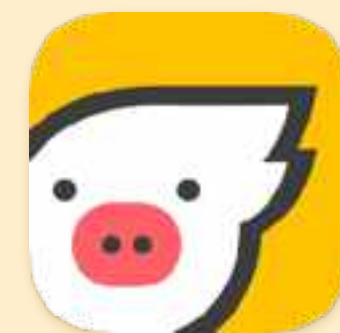
MAU
41.3 million
(Sep, 2019)

China's 2nd largest OTA and the historic rival of Ctrip before their 2015 partnership.

Despite the similarity to Ctrip, Qunar attracts more mature and educated users, especially young couples.



100%



Feizhu 飞猪

MAU
28.8 million
(Sep, 2019)

Feizhu, aka Fliggy is Alibaba's online travel agency platform. It is featured on Taobao and benefits from its native traffic.

80% of users are under 35 among which 42% are 31-35 years old.



Tuniu 途牛

MAU
9.4 million
(Sep, 2019)

Tuniu is a Nanjing based OTA founded in 2008. It offers packaged tours and transport booking.

In 2014, Tuniu collaborated with Ctrip to share resources, and received investment from JD.com in 2015.

TRAVEL REVIEW SITES

Tencent 腾讯

18%



DianPing 大众点评

MAU

60 million

(Mar, 2019)

China's biggest shopping guide with users sharing reviews for restaurants and tourist attractions. It is the Chinese equivalent of Yelp or TripAdvisor.

Most of its users are women and people who are 25-35 years old. It has been invested in by Booking.com.

Tencent 腾讯

\$250M



MaFengWo 马蜂窝

MAU

23 million

(Sep, 2019)

Founded in 1999. MaFengWo is an UGC travel review platform, like Little Red Book, where customers can share their thoughts about brands and places. It also provides travel booking services.

Alibaba Group 阿里巴巴集团

28%



Qyer 穷游

MAU

2.6 million

(Sep, 2019)

Qyer provides outbound travel services including accommodation and transport booking, packaged tours and corporate travel services for a predominantly younger audience (70% are under 35 years old).



INSIGHTFUL REPORT

2019 Chinese Outbound Travel Market Review

asia.fabernovel.com/2020/04/09/trip-x-fabernovel-2019-chinese-outbound-travel-market-review



GREAT ARTICLE

The Platform Travel Marketers Shouldn't Miss

parklu.com/dianping-the-platform-marketers-should-know





Other Important Niche Networks



Zhihu

CHINESE NAME

知乎

zhī hū
Phonetic: ju-who

LAUNCHED

2011

OWNERSHIP

Backed by Multiple Investors



SUMMARY

Chinese question-and-answer site where questions are created, answered, edited and organized by a community of users.

KEY FEATURES

Question & Answers Platform
Live section for professional advice
In-depth articles

COMPARABLE TO



MONTHLY ACTIVE USERS

34 million

(Mar 2018)

DEMOGRAPHICS

- University Graduate
- Higher income
- Strong purchasing power
- 20% work in the tech industry

MARKETING OPPORTUNITIES

- **Q&A Campaigns**
Brands can answer questions about the brand and their industry.
- **KOL Endorsements**
Zhihu's KOLs tend to be experts in their niche markets and have the power to enhance a brand's image and reputation.
- **Zhihu Live**
Brands can broadcast live sessions on a chosen subject featuring live chat and interactions with professionals.
- **In-Depth Articles**
Brands can publish long-form content to gain credibility in their industry. Whilst this content is generally too detailed for normal users, it is highly valued by people in that industry.

Audi, the "headlight company"

AUDI'S CAMPAIGN

In 2017, Audi launched a Q&A campaign answering questions related to their brand. For example: "How did the brand get the nickname 'The Head Light Company?'". Audi submitted answers to these questions in a long-form article with technical illustrations. These content was further enhanced by Zhihu's users who added additional response based on their own understanding.

THE RESULT

The topic generated 444 responses from different users and the most relevant answers gathered thousands of upvotes. Over 3,500 people followed this specific question and Audi's answer was upvoted nearly 8,000 times. This topic has been viewed nearly 10 million times and other posts by Audi are featured in the related section on the right.

[zhihu.com/question/23519984](https://www.zhihu.com/question/23519984)



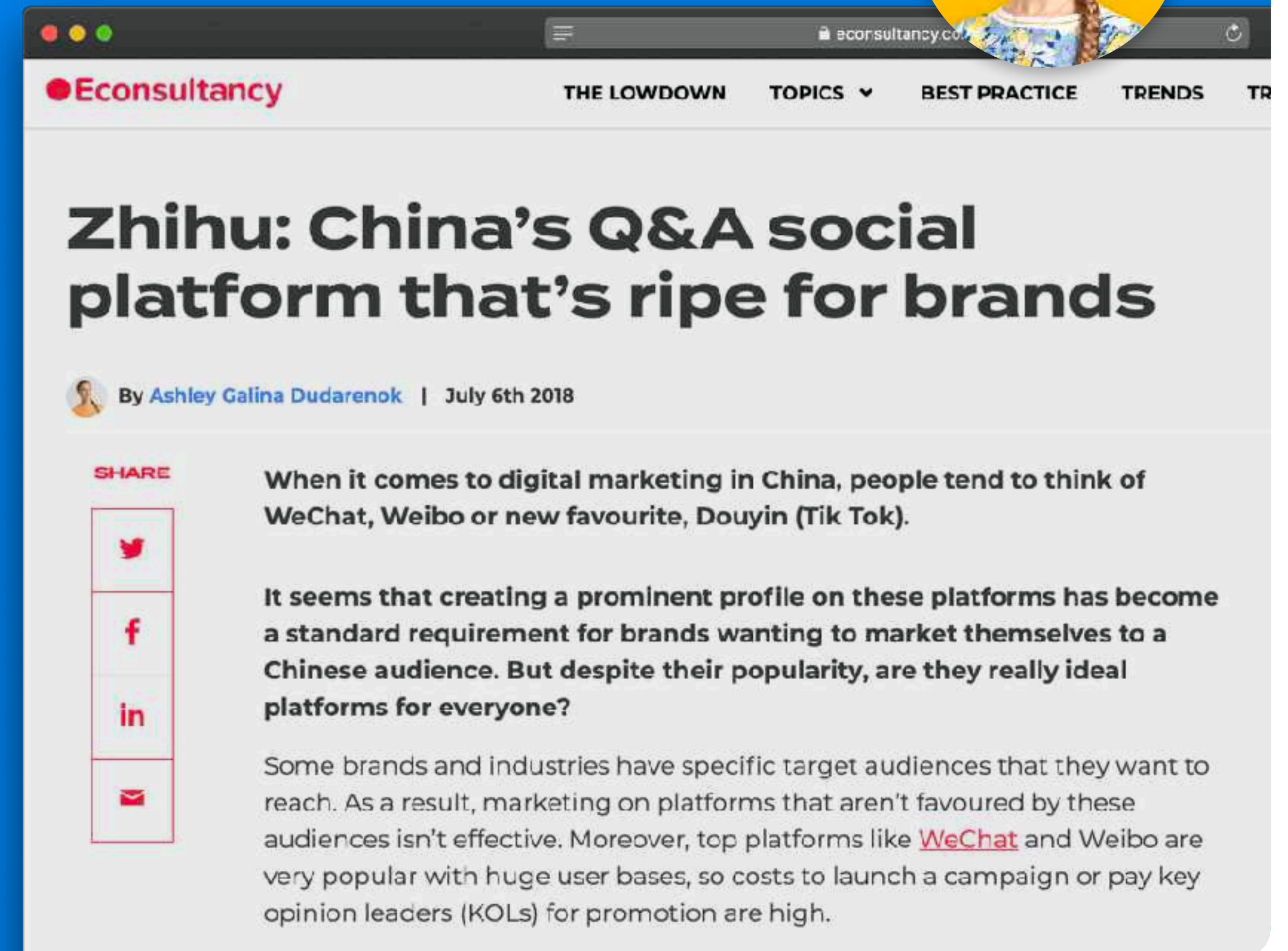


INSIGHTFUL ARTICLE

Zhihu: China's Q&A social platform that's ripe for brands

China marketing expert Ashley Galina Dudarenok wrote this great piece for Econsultancy encouraging brands not to overlook Zhihu.

econsultancy.com/zhihu-china-s-q-a-social-platform-that-s-ripe-for-brands/





Douban

CHINESE NAME

豆瓣

dòu bàn
Phonetic: dow-ban

LAUNCHED

2005

OWNERSHIP

Private

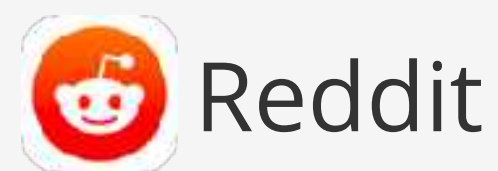
SUMMARY

A social network dedicated to sharing content on a range of interests, including movies, television, books, music & more.

KEY FEATURES

Discussions, reviews, ratings & recommendations.

COMPARABLE TO



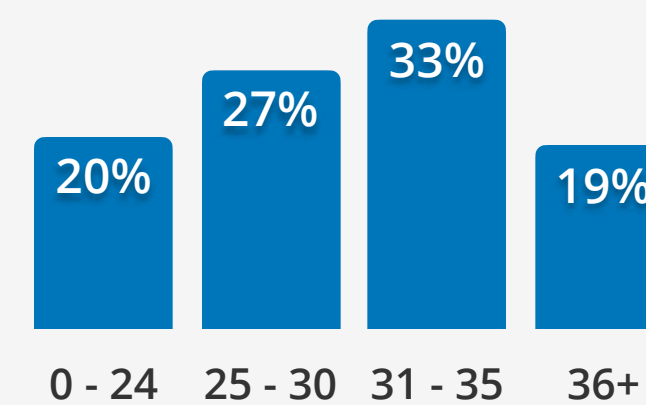
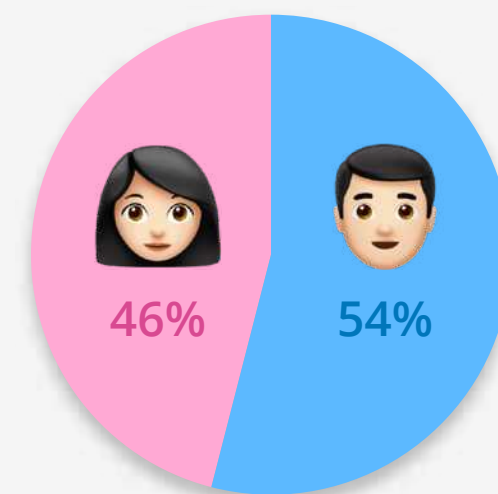
MONTHLY ACTIVE USERS

300 Million

(Mar 2018)

DEMOGRAPHICS

- University Graduates
- White collar workers
- Majority of users are from developed coastal cities



SUITABLE FOR Arts & Media

OPPORTUNITIES FOR BRANDS

- Interest-based advertising
- Direct advertising to users, global brands can target ads to niche users of the platform.
- Special premium station for Brands
- Audio ads on Douban FM



Toutiao

CHINESE NAME

今日头条

jīnrì tóu tiáo
Phonetic: tow-tee-yow

LAUNCHED

2012

OWNERSHIP



100%

SUMMARY

AI-based news aggregator giving you recommendations on the homepage from various media sources.

KEY FEATURES

A tailored feed list of content for each user generated by an AI.

COMPARABLE TO

No direct comparison outside China.

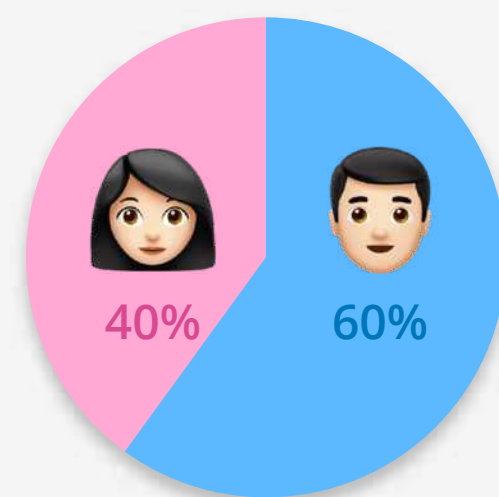
MONTHLY ACTIVE USERS

260 Million

(Mar 2019)

DEMOGRAPHICS

- 85% under 35 years old
- University Graduates
- 1st & 2nd Tier cities
- Wealthier than majority of Chinese netizens



SUITABLE FOR

All brands

OPPORTUNITIES FOR BRANDS

- Private publishers, official media, brands and blogs.
- Advertising revenue is shared with the content creator.
- No need to follow an account to see its content, great potential for exposure.
- No distractions (no messaging or social feature)



Business Collaboration

BUSINESS COLLABORATION APPS

For a long time synonymous with cheap labour, China is still behind the West when it comes to adopting software in the workplace. Why try to be more efficient when it's easier to just hire more people?

This finally seems to be changing. Wages have been rising sharply for over 10 years as companies battled for talent. The recent lockdown and economic slowdown brought on by the COVID-19 pandemic has further accelerated adoption of enterprise collaboration apps.

 **Alibaba Group**
阿里巴巴集团 **100%**



DingTalk
钉钉

DAILY ACTIVE USERS
150 million
(Feb, 2020)

Launched in 2015 DingTalk is the oldest of the Chinese collaboration platforms. Featuring messaging, files conference calls and HR management applications.

Tencent 腾讯 **100%**



WeChat Work
企业微信

DAILY ACTIVE USERS
13.74 million
(Feb, 2020)

WeChat Work is essentially just WeChat, but for your professional life. It shares most of the features of WeChat plus a set of tools to help companies manage their work force including arranging holidays & expense approvals.

 **ByteDance**
字节跳动 **100%**



Lark
飞书

DAILY ACTIVE USERS
0.25 million
(Feb, 2020)

Lark is the latest product from ByteDance and was first developed for to replace Alibaba's DingTalk internally. It is most similar to Slack, but also features a calendar and collaboration like Notion.



KOLs

(influencers)

WHY KOLS ARE SO IMPORTANT IN CHINA

49% of Chinese consumers depend on KOL recommendations & 84% trust online reviews by peers.

Chinese e-commerce platforms have faced multiple scandals related to fake goods or unsafe products. Customers were wary to trust brands, so they started to turn to social media to view people's recommendations about goods. Research conducted by Accenture found that 70% of Chinese born after 1995 will turn to social media to directly purchase products instead of traditional platforms.

In 2019 China's KOL industry was valued at 57 billion RMB. KOLs became popular thanks to social media and are now able to monetize that following thanks to deeper integration with e-commerce platforms. On page 101 we covered

how the traditional traffic driven model of E-commerce in China is shifting to one driven by content. Now when a KOL promotes a product on social media, customers can instantly purchase it without leaving the app, offering a better ROI for brands using KOLs.

DIFFERENCE BETWEEN KOLS & INFLUENCERS

The Chinese concept of a KOL is comparable to Western influencers. Both build trust with their community and promote products on social media. However, KOLs are experts in their domain and brands use this expertise to show their product's value and inspire customer trust. Increasingly brands don't just turn to KOLs to reach a certain audience, but also for their ability to generate more creative and engaging content that connects with the audience.

EXPERT OPINION

"It does not make sense for any single brand to try and serve the limitless range of interests their customers might have, but it does make sense to support the KOLs that do."



Elijah Whaley
CMO
PARKLU

KOL PROMOTIONAL CAMPAIGNS

It's nearly impossible to sell in China without the help of KOLs. The e-commerce competition is too fierce and brands without KOLs won't have any visibility. Customers won't have any proof of the quality of your product.

KEY OPINION CONSUMERS (KOC)

Key Opinions Consumers are everyday consumers with only few hundreds followers, leaving online reviews. They are important for Brands for their relatability and trustworthy nature. The success of Little Red Book is an example of KOC marketing and its value for consumers.

EXPERT OPINION

“If you don't have a KOL you're not going to sell”



Cyril Drouin
Head of E-commerce
Publicis China

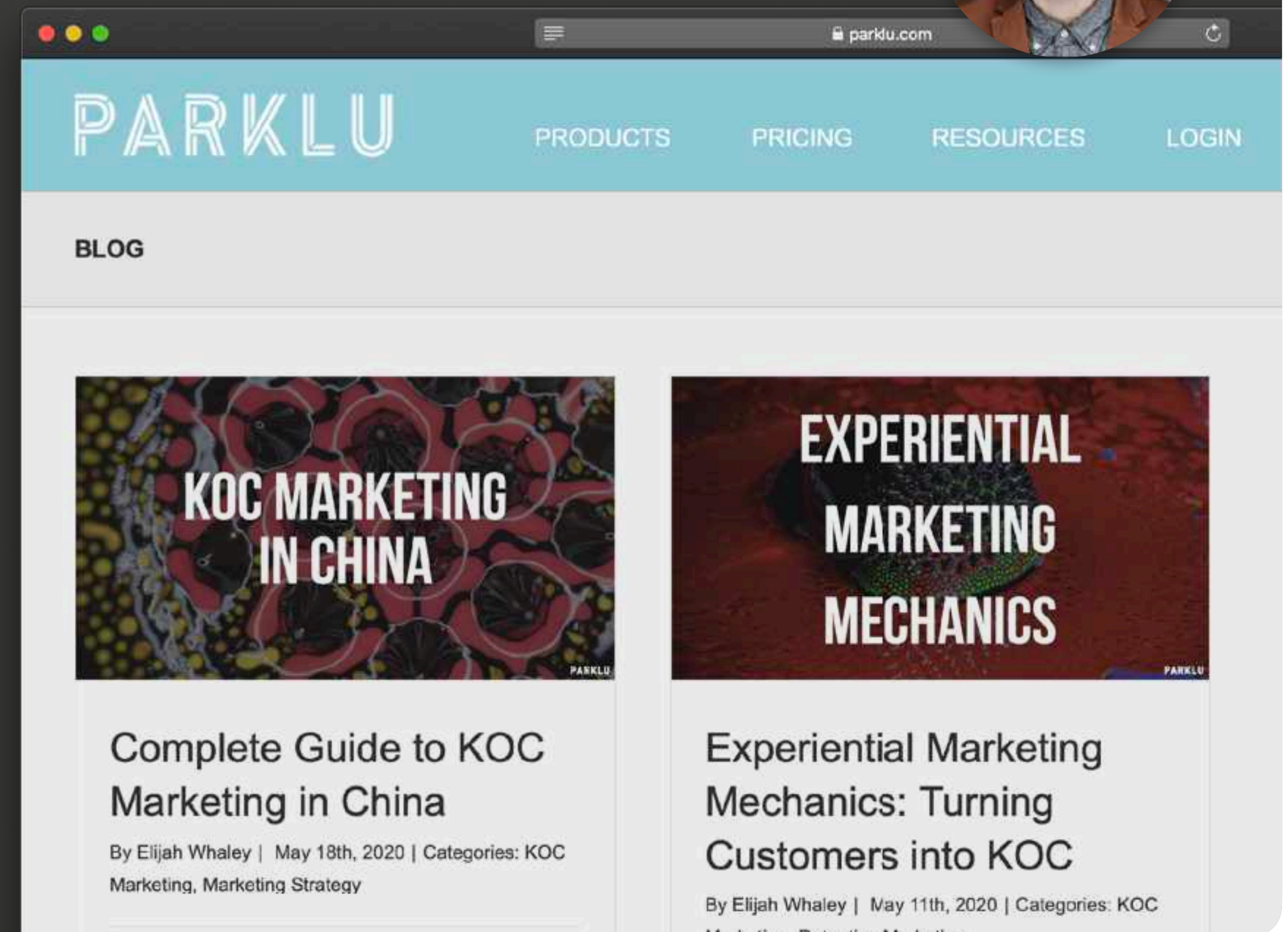




THOUGHT LEADERS PARKLU

Discover weekly interesting content about KOL marketing in China written by thought leader Elijah Whaley and his team.

[PARKLU.com/blogs](https://parklu.com/blogs)





Resources

WECHAT ACCOUNTS TO FOLLOW FOR UPDATES

Here are 12 WeChat Official accounts we recommend you follow to stay up to date on the latest marketing and tech trends in China.

31Ten



China Channel



Daxue Consulting



Fabernovel



Grata



IT Consultis



KAWO



PARKLU



Sekkei Studio



Technode



Walk The Chat



WeChat Global



SIX AWESOME PODCASTS TO SUBSCRIBE TO



The China Marketing Podcast
by SupChina
<https://pod.link/1314741445>



Daxue Talks
by Daxue Consulting
<https://pod.link/1492896072>



The China Startup Pulse
by Chinaccelerator
<https://pod.link/1033021352>



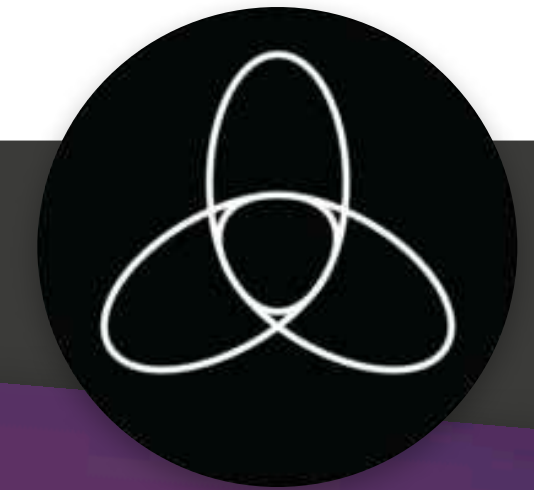
Evolving for the Next Billion
by GGV Capital
<https://pod.link/1336107529>



China Tech Talk
by TechNode
<https://pod.link/1228528520>



Tech Buzz China
by Pandaily
<https://pod.link/1378670805>



ANNUAL TRENDS REPORT

China Marketing Trends

Chris Baker and his team at Totem Media interview a wide range of marketers to collate and share their trends for the year ahead.

[TalktoTotem.com/insights](https://talktototem.com/insights)



KAWO Solutions Pricing Directory Blog About Login 中文 **REQUEST DEMO**

China Digital Agency Directory

Find Your Partner for Marketing in China

SELECT A SERVICE: All services

SELECT AN INDUSTRY: All industries

SELECT A LOCATION: All locations

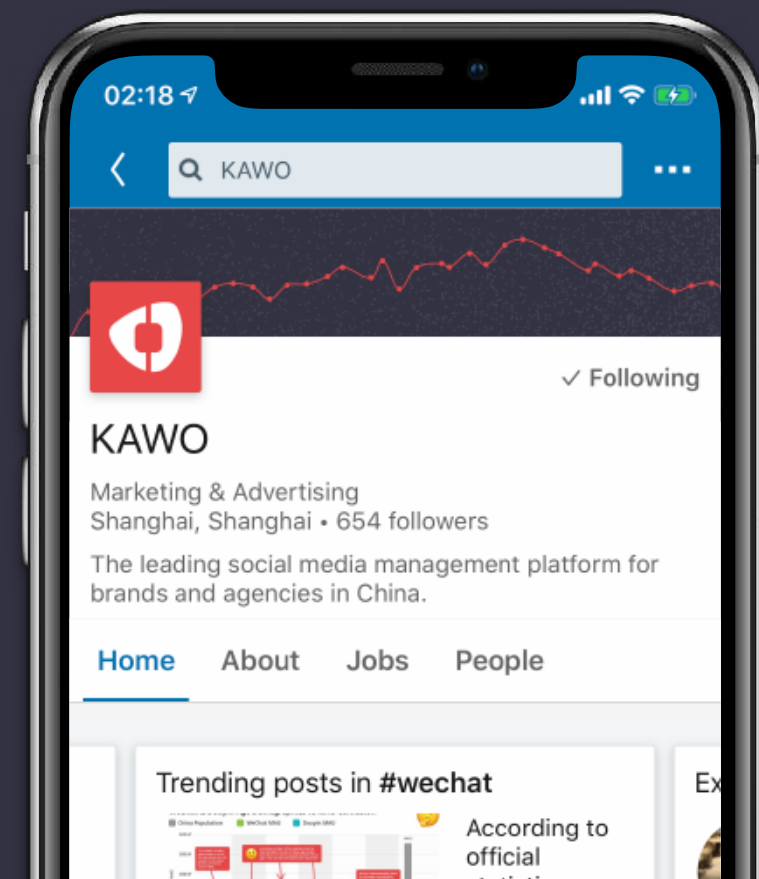
Showing 362 agencies. [Directory Index](#) [Frequently Asked Questions](#)

- 31 Ten**
11-50 employees
- ACT of ASSEMBLY** Act of Assembly
11-50 employees
- CLA** China Luxury Advisors Inc
11-50 employees

IF YOU ENJOYED THIS REPORT...

ONE

Follow KAWO on LinkedIn or WeChat



[LinkedIn.com/company/KAWO](https://www.linkedin.com/company/KAWO)

TWO

Enquire About a Webinar for Your Team

This content was originally created as a talk to be presented live in front of an audience. We're always open to opportunities to share our expertise with your audience.

Contact our team: webinar@kawo.com

SHAMELESS SELF PROMOTION



The Enterprise Social Media Management Platform for China.

At KAWO it's our mission to build the best SaaS platform to empower social media teams in China to achieve greatness.



MULTIPLE ACCOUNTS

Manage all your social channels in one place.



PLANNING

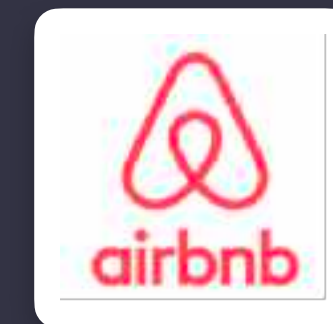
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Credits

AUTHORS



EDITOR

Alex Duncan

Alex is originally from England, but has lived in China for 14 years and is the Co-founder and product lead of KAWO. He has a passion for user-experience, design and programming.

alex@kawo.com

[Linkedin.com/in/acjduncan](https://www.linkedin.com/in/acjduncan)



EDITOR

Murphy Chen

Originally from Xinjiang province in the far West of China, Murphy is the Account Manager of KAWO. She loves to connect with people and share her knowledge about China's digital landscape.

murphy@kawo.com

[Linkedin.com/in/murphy-chen](https://www.linkedin.com/in/murphy-chen)



RESEARCHER

Erwan Chatelet

Erwan is originally from France and has spent the past year in China. His passion for data, marketing and web development led him to join KAWO.

erwan@kawo.com

[Linkedin.com/in/erwanchatelet](https://www.linkedin.com/in/erwanchatelet)

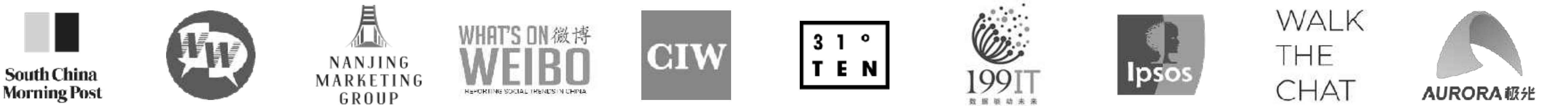
Putting together a guide like this is obviously a huge effort and the entire KAWO team all contributed in some form.

Huge thanks also to our experts who gave quotes. In order of appearance:

- [Steven Yan](#)
- [Thibault Genaitay](#)
- [Aaron Chang](#)
- [Jenny Chen](#)
- [Yujun Wu](#)
- [Rachel Daydou](#)
- [Elijah Whaley](#)

C R E D I T S

This presentation wouldn't have been possible without the dozens of resources online that we studied and have referenced on the following pages.



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