Please do not distribute in public without authorization.

You can share no more than 5 charts in your online publication, linking back to China Internet Watch website.
Download a more detailed PDF version (free; about 40 pages) here: 
https://ciw.me/wp2020

Or, get a comprehensive one (paid; over 110 pages) here: 
https://ciw.me/dossier2020
China Internet Users

No. of internet users (millions)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Users (millions)</td>
<td>298.0</td>
<td>384.0</td>
<td>457.3</td>
<td>513.1</td>
<td>564.0</td>
<td>617.58</td>
<td>648.75</td>
<td>688.26</td>
<td>731.25</td>
<td>771.98</td>
<td>828.51</td>
<td>854.49</td>
<td>903.59</td>
</tr>
</tbody>
</table>

Internet penetration (%)

- 2008: 22.6%
- 2009: 28.9%
- 2010: 34.3%
- 2011: 38.3%
- 2012: 42.1%
- 2013: 45.8%
- 2014: 47.9%
- 2015: 50.3%
- 2016: 53.2%
- 2017: 55.8%
- 2018: 59.6%
- 2019 (H1): 61.2%
- 2020 (Mar): 64.5%

Source: CNNIC, Apr 2020
China Internet Penetration by Areas

- Rural areas: 28.1% (2013) to 46.2% (2020 Mar)
- Urban areas: 60.3% (2013) to 76.5% (2020 Mar)

Source: CNNIC, Apr 2020
China Internet Users by Age Group

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Dec-18</th>
<th>Mar-20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 10 y-o</td>
<td>4.1%</td>
<td>3.9%</td>
</tr>
<tr>
<td>10-19 y-o</td>
<td>17.5%</td>
<td>19.3%</td>
</tr>
<tr>
<td>20-29 y-o</td>
<td>26.8%</td>
<td>21.5%</td>
</tr>
<tr>
<td>30-39 y-o</td>
<td>23.5%</td>
<td>20.8%</td>
</tr>
<tr>
<td>40-49 y-o</td>
<td>15.6%</td>
<td>17.6%</td>
</tr>
<tr>
<td>50-59 y-o</td>
<td>5.9%</td>
<td>10.2%</td>
</tr>
<tr>
<td>60 y-o &amp; above</td>
<td>6.6%</td>
<td>6.7%</td>
</tr>
</tbody>
</table>

Source: CNNIC, April 2020
China Internet Users by Education Level

- Primary school & lower: 18.2% (Dec-18), 17.2% (Mar-2020)
- Junior high school: 38.7% (Dec-18), 41.1% (Mar-2020)
- Senior high school/vocational school: 24.5% (Dec-18), 22.2% (Mar-2020)
- College & University: 18.6% (Dec-18), 19.5% (Mar-2020)

Source: CNNIC, April 2020
Top Social Network Penetrations

- WeChat: 85.1% (2018), 83.4% (2020 Mar)
- Qzone: 47.6% (2018), 58.8% (2020 Mar)
- Weibo: 42.5% (2018), 42.3% (2020 Mar)

Source: CNNIC, Apr 2020
China Online Shopping User Growth

- **2015**: 413.25 million users, 60.0% of internet users
- **2016**: 466.70 million users, 63.8% of internet users
- **2017**: 533.32 million users, 69.1% of internet users
- **2018**: 610.11 million users, 73.6% of internet users
- **2019 H1**: 638.82 million users, 74.8% of internet users
- **2020 (Mar)**: 710.27 million users, 78.6% of internet users

Source: CNNIC, Apr 2020
China Online Travel Booking User Growth

<table>
<thead>
<tr>
<th>Year</th>
<th>Millions</th>
<th>% of internet users</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>259.55</td>
<td>37.7%</td>
</tr>
<tr>
<td>2016</td>
<td>299.22</td>
<td>40.0%</td>
</tr>
<tr>
<td>2017</td>
<td>375.78</td>
<td>48.7%</td>
</tr>
<tr>
<td>2018</td>
<td>410.01</td>
<td>49.5%</td>
</tr>
<tr>
<td>2019 H1</td>
<td>418.15</td>
<td>49.9%</td>
</tr>
<tr>
<td>2020 (Mar)</td>
<td>372.96</td>
<td>41.3%</td>
</tr>
</tbody>
</table>

Source: CNNIC, Apr 2020
China Online Video User Growth

- **2018 H1**: 711.07 million
- **2018**: 724.86 million
- **2019 H1**: 758.77 million
- **2020 (Mar)**: 850.44 million

**% of internet users**
- **2018 H1**: 88.7%
- **2018**: 87.5%
- **2019 H1**: 88.8%
- **2020 (Mar)**: 94.1%

Source: CNNIC, Apr 2020
China Short Video User Growth

- **2018 H1:** 594.03 millions (incl short video users), 74.1% of internet users
- **2018:** 647.98 millions (incl short video users), 78.2% of internet users
- **2019 H1:** 647.64 millions (incl short video users), 75.8% of internet users
- **2020 (Mar):** 773.25 millions (incl short video users), 85.6% of internet users

Source: CNNIC, Apr 2020
The Number of Public-listed Internet Companies from China

- Listed in the U.S., 40.0%
- Listed in Hong Kong, 23.0%
- Listed in Shanghai & Shenzhen, 37.0%
China Internet Economy Revenues Structure

- **Online media**
- **Internet finance**
- **Transportation services**
- **Entertainment**
- **Online education**
- **Online healthcare**
- **Lifestyle consumption**
- **Company services**
- **Others**

### Annual Compound Growth Rate (CAGR) of Internet Economy’s Typical Revenue Sources

<table>
<thead>
<tr>
<th>Year</th>
<th>Online Education</th>
<th>Internet Finance</th>
<th>Lifestyle Consumption</th>
<th>Entertainment</th>
<th>Online Media</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>7.1%</td>
<td>25.9%</td>
<td>40.9%</td>
<td>8.5%</td>
<td>10.4%</td>
</tr>
<tr>
<td>2014</td>
<td>7.7%</td>
<td>22.6%</td>
<td>42.0%</td>
<td>11.7%</td>
<td>8.4%</td>
</tr>
<tr>
<td>2015</td>
<td>7.3%</td>
<td>18.5%</td>
<td>42.2%</td>
<td>15.7%</td>
<td>6.5%</td>
</tr>
<tr>
<td>2016</td>
<td>7.1%</td>
<td>18.0%</td>
<td>41.3%</td>
<td>16.4%</td>
<td>6.1%</td>
</tr>
<tr>
<td>2017</td>
<td>6.8%</td>
<td>17.0%</td>
<td>41.8%</td>
<td>17.9%</td>
<td>5.5%</td>
</tr>
<tr>
<td>2018e</td>
<td>7.0%</td>
<td>16.3%</td>
<td>39.6%</td>
<td>20.5%</td>
<td>5.3%</td>
</tr>
<tr>
<td>2019e</td>
<td>7.1%</td>
<td>15.5%</td>
<td>36.8%</td>
<td>24.0%</td>
<td>5.2%</td>
</tr>
<tr>
<td>2020e</td>
<td>7.1%</td>
<td>15.1%</td>
<td>34.3%</td>
<td>26.7%</td>
<td>5.2%</td>
</tr>
</tbody>
</table>

*Source: iResearch, Feb 2019*
China Online Advertising Market

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Online ads market (billion yuan)</th>
<th>Growth YoY</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018Q1</td>
<td>93.9</td>
<td>26.5%</td>
</tr>
<tr>
<td>2018Q2</td>
<td>95.7</td>
<td>21.6%</td>
</tr>
<tr>
<td>2018Q3</td>
<td>100.7</td>
<td>18.8%</td>
</tr>
<tr>
<td>2018Q4</td>
<td>119.2</td>
<td>29.8%</td>
</tr>
<tr>
<td>2019Q1</td>
<td>111.1</td>
<td>18.3%</td>
</tr>
<tr>
<td>2019Q2</td>
<td>108.8</td>
<td>13.7%</td>
</tr>
<tr>
<td>2019Q3</td>
<td>113.6</td>
<td>12.9%</td>
</tr>
<tr>
<td>2019Q4</td>
<td>136.5</td>
<td>14.5%</td>
</tr>
<tr>
<td>2020Q1</td>
<td>89.0</td>
<td>-19.9%</td>
</tr>
</tbody>
</table>
The Average Weekly Time Spent Online in China (Hours)

- 2014: 26.1 hours
- 2015: 26.2 hours
- 2016: 26.4 hours
- 2017: 27.0 hours
- 2018: 27.6 hours
- 2019 (June): 27.9 hours
- 2020 (Mar): 30.8 hours

Source: CNNIC, April 2020
Top Internet Application Categories

- Users (million)
- Penetration (% of internet users)

<table>
<thead>
<tr>
<th>Category</th>
<th>Users (million)</th>
<th>Penetration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Messaging</td>
<td>896.13</td>
<td>99.2%</td>
</tr>
<tr>
<td>Search engine</td>
<td>750.15</td>
<td>83.0%</td>
</tr>
<tr>
<td>News</td>
<td>730.72</td>
<td>80.9%</td>
</tr>
<tr>
<td>Payment</td>
<td>767.98</td>
<td>85.0%</td>
</tr>
<tr>
<td>Shopping</td>
<td>710.27</td>
<td>78.6%</td>
</tr>
<tr>
<td>Food delivery</td>
<td>397.80</td>
<td>44.0%</td>
</tr>
<tr>
<td>Travel booking</td>
<td>372.96</td>
<td>40.1%</td>
</tr>
<tr>
<td>Car hailing</td>
<td>362.96</td>
<td>41.3%</td>
</tr>
<tr>
<td>Education</td>
<td>422.96</td>
<td>40.1%</td>
</tr>
<tr>
<td>Music</td>
<td>635.13</td>
<td>70.3%</td>
</tr>
<tr>
<td>Literature</td>
<td>455.38</td>
<td>50.4%</td>
</tr>
<tr>
<td>Games</td>
<td>531.82</td>
<td>58.9%</td>
</tr>
<tr>
<td>Short videos</td>
<td>850.44</td>
<td>94.1%</td>
</tr>
<tr>
<td>Videos (incl short v.)</td>
<td>559.62</td>
<td>85.6%</td>
</tr>
<tr>
<td>Live streaming</td>
<td>163.86</td>
<td>62.0%</td>
</tr>
<tr>
<td>Personal finance mgmt</td>
<td>18.1%</td>
<td></td>
</tr>
</tbody>
</table>

Source: CNNIC, Apr 2020
China Short Video Market Forecast

Revenues (RMB; Billions)

Growth rate YoY (%)

<table>
<thead>
<tr>
<th>Year</th>
<th>2016</th>
<th>2017</th>
<th>2018e</th>
<th>2019e</th>
<th>2020e</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues (RMB: Billion)</td>
<td>1.71</td>
<td>4.87</td>
<td>19.52</td>
<td>41.56</td>
<td>79.71</td>
</tr>
<tr>
<td>Growth rateYoY (%)</td>
<td>183.9%</td>
<td>301.0%</td>
<td>113.0%</td>
<td>91.8%</td>
<td></td>
</tr>
</tbody>
</table>

Source: iResearch, Feb 2019
China Online Shopping Market

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Transactions (Billion RMB)</th>
<th>Growth YoY</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018Q1</td>
<td>1,691.6</td>
<td>33.1%</td>
</tr>
<tr>
<td>2018Q2</td>
<td>1,868.6</td>
<td>25.7%</td>
</tr>
<tr>
<td>2018Q3</td>
<td>1,846.0</td>
<td>25.4%</td>
</tr>
<tr>
<td>2018Q4</td>
<td>2,501.7</td>
<td>24.9%</td>
</tr>
<tr>
<td>2019Q1</td>
<td>2,141.8</td>
<td>26.6%</td>
</tr>
<tr>
<td>2019Q2</td>
<td>2,409.7</td>
<td>29.0%</td>
</tr>
<tr>
<td>2019Q3</td>
<td>2,292.0</td>
<td>24.2%</td>
</tr>
<tr>
<td>2019Q4</td>
<td>3,173.9</td>
<td>26.9%</td>
</tr>
<tr>
<td>2020Q1</td>
<td>2,115.9</td>
<td>-1.2%</td>
</tr>
</tbody>
</table>

Source: iResearch, April 2020
China Online Travel Market

Transactions (Billion RMB)

2018Q1: 324.7
2018Q2: 358.7
2018Q3: 446.0
2018Q4: 382.9
2019Q1: 447.4
2019Q2: 475.9
2019Q3: 540.6
2019Q4: 421.4
2020Q1: 186.2

Growth QoQ

2018Q1: 14.1%
2018Q2: 10.5%
2018Q3: 24.3%
2018Q4: -14.1%
2019Q1: 16.9%
2019Q2: 6.4%
2019Q3: 13.6%
2019Q4: -22.0%
2020Q1: -55.8%

Source: iResearch, April 2020
Categories of Mobile Apps by Usage Hours

- Messaging, 14.8%
- Online video (excl. short video), 14%
- Short video, 11.0%
- Online audio, 9.0%
- Online Music, 8.9%
- Literature, 7.2%
- Social networking, 5.1%
- News, 4.8%
- Games, 4.7%
- Live streaming, 4.5%
- Other, 16.1%

Source: CNNIC, Apr 2020
### Top Mobile App Categories

<table>
<thead>
<tr>
<th>Category</th>
<th>Users (million)</th>
<th>Penetration (% of mobile internet users)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Messaging</td>
<td>890.12</td>
<td>99.2%</td>
</tr>
<tr>
<td>Search engine</td>
<td>745.35</td>
<td>83.0%</td>
</tr>
<tr>
<td>News</td>
<td>726.42</td>
<td>81.0%</td>
</tr>
<tr>
<td>Payment</td>
<td>765.08</td>
<td>85.3%</td>
</tr>
<tr>
<td>Shopping</td>
<td>707.49</td>
<td>78.9%</td>
</tr>
<tr>
<td>Food delivery</td>
<td>396.53</td>
<td>44.2%</td>
</tr>
<tr>
<td>Education</td>
<td>420.23</td>
<td>46.9%</td>
</tr>
<tr>
<td>Music</td>
<td>632.74</td>
<td>70.5%</td>
</tr>
<tr>
<td>Literature</td>
<td>452.55</td>
<td>50.5%</td>
</tr>
<tr>
<td>Games</td>
<td>528.93</td>
<td>59.0%</td>
</tr>
</tbody>
</table>

Source: CNNIC, Apr 2020
The average monthly time spent on WeChat grew by 5.7% YoY to 37.3 hours in March 2020.
China Mini-Programs (MP) Platforms in Q1 2020

- WeChat: MP DAU: >400M
- Alipay: MP MAU: >500M
- Taobao: Light Stores
- QuickApp
- QQ
- TikTok
- Toutiao
- Baidu: Smart Program

QuickApp: new application ecosystem launched by the nine major mobile phone vendors in China including Huawei, Xiaomi, OPPO, vivo, ZTE, Gionee, Lenovo, Meizu, Nubia

Source: China Internet Watch Research, Apr 2020
Download a more detailed PDF version (free; about 40 pages) here: https://ciw.me/wp2020

Or, get a comprehensive one (paid; over 110 pages) here: https://ciw.me/dossier2020
THE END

For comprehensive statistics on China digital trends & insights, download CIW Dossier https://ciw.me/dcdiwp

We appreciate any feedback to improve future updates.
ciwsupport@incitez.com