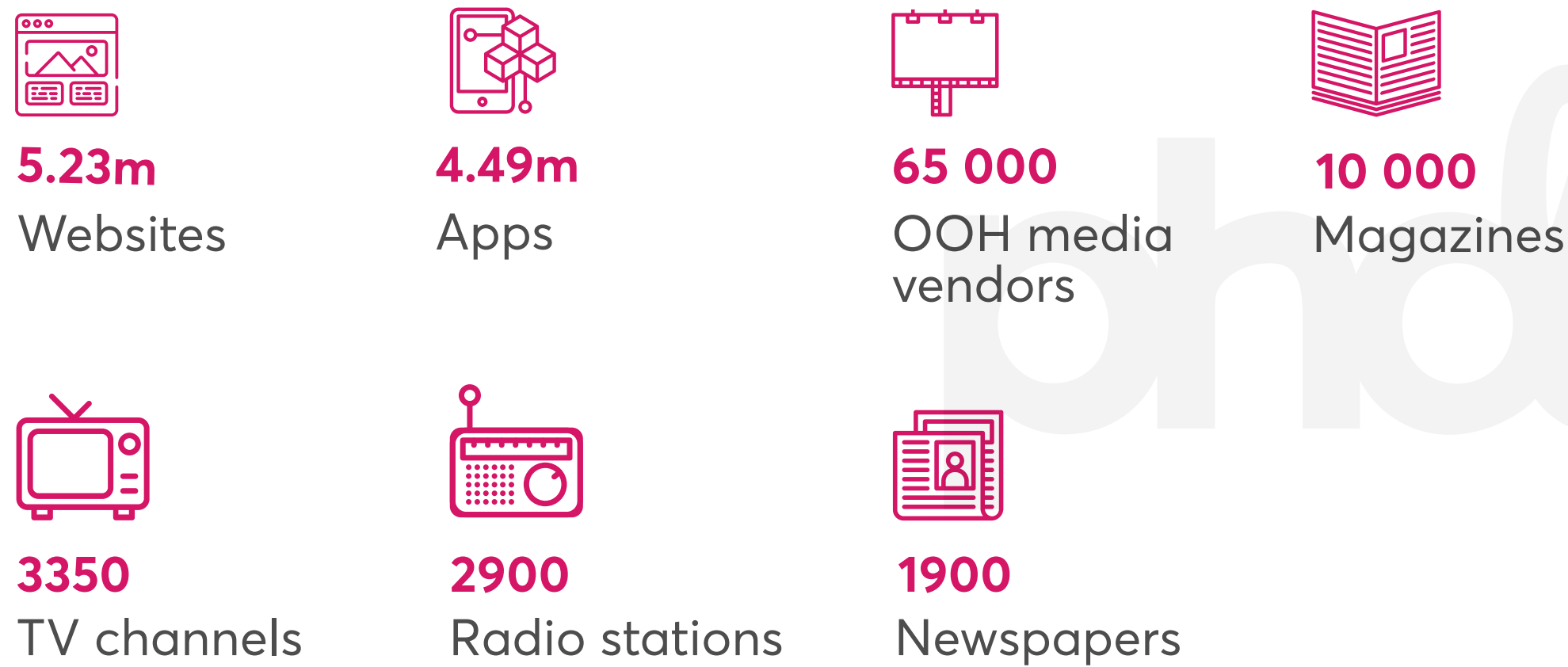


# China Media Landscape

AT A GLANCE

## CHINA MEDIA ENVIRONMENT

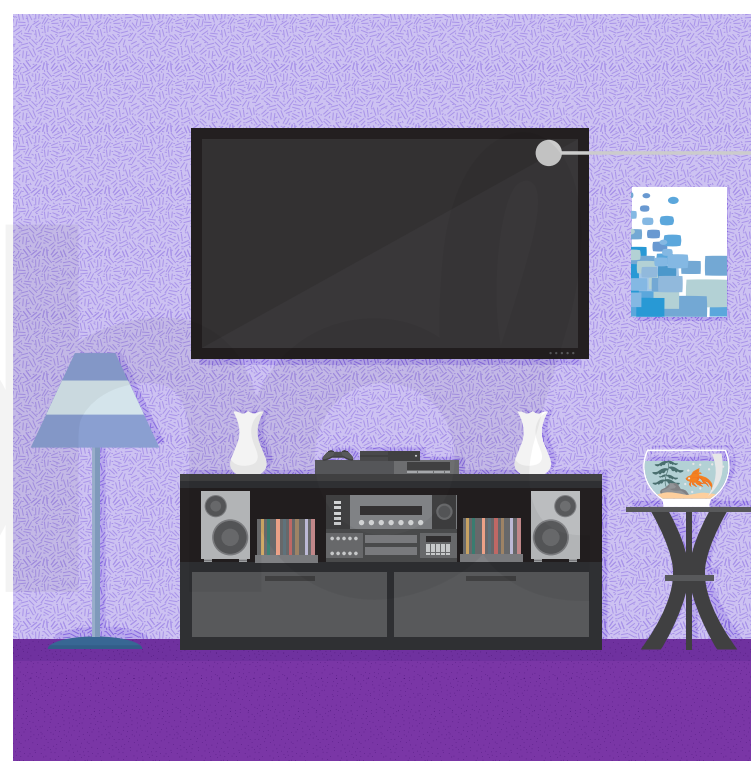
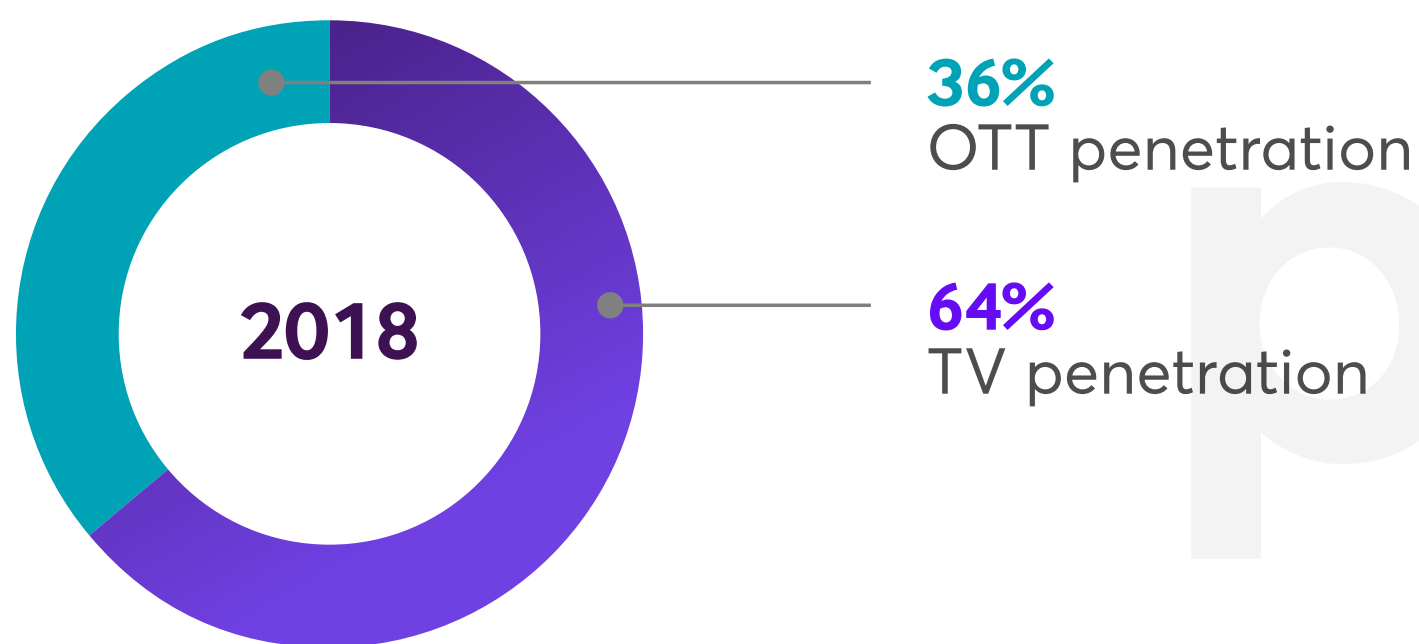


USD 100.13b



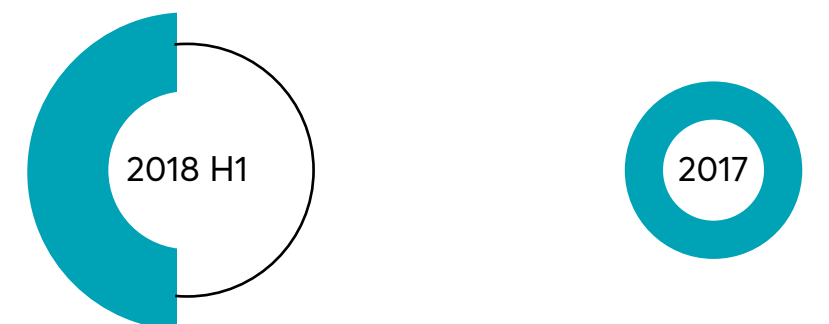
\* (+17.4%) in 2018 vs USD 223.7 billion in the US (+8.97%)  
 \*\* (+30.03%) in 2018

## CHINA OTT & TV MARKET



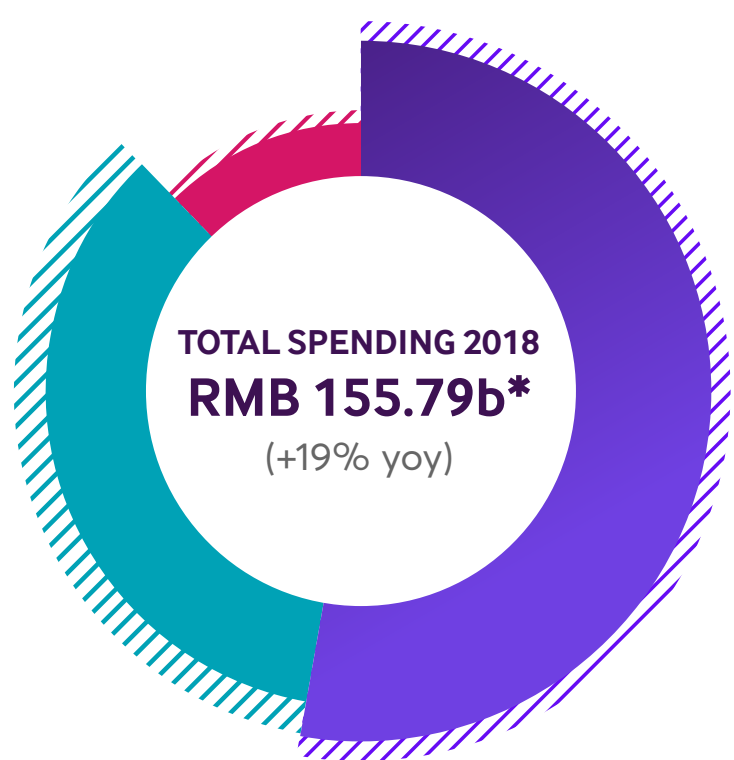
264.2m  
Smart TV users in 2018  
(+19%)

OTT AD SPENDING  
RMB 2.3b (2018 H1)    RMB 2.35b (2017)



## CHINA OOH MEDIA

■ Share of OOH spending per tier  
 ▨ Growth rates per city tier



### TIER 1

■ 53%  
 ▨ 12%

### TIER 2

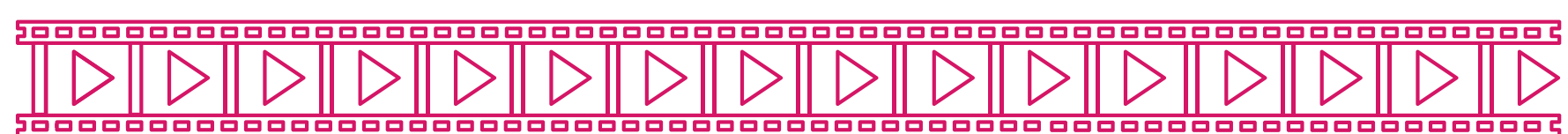
■ 35%  
 ▨ 17%

### TIER 3

■ 12%  
 ▨ 10%

VIDEO OOH SPENDING

RMB 81.48b



METRO OOH SPENDING

RMB 38.39b

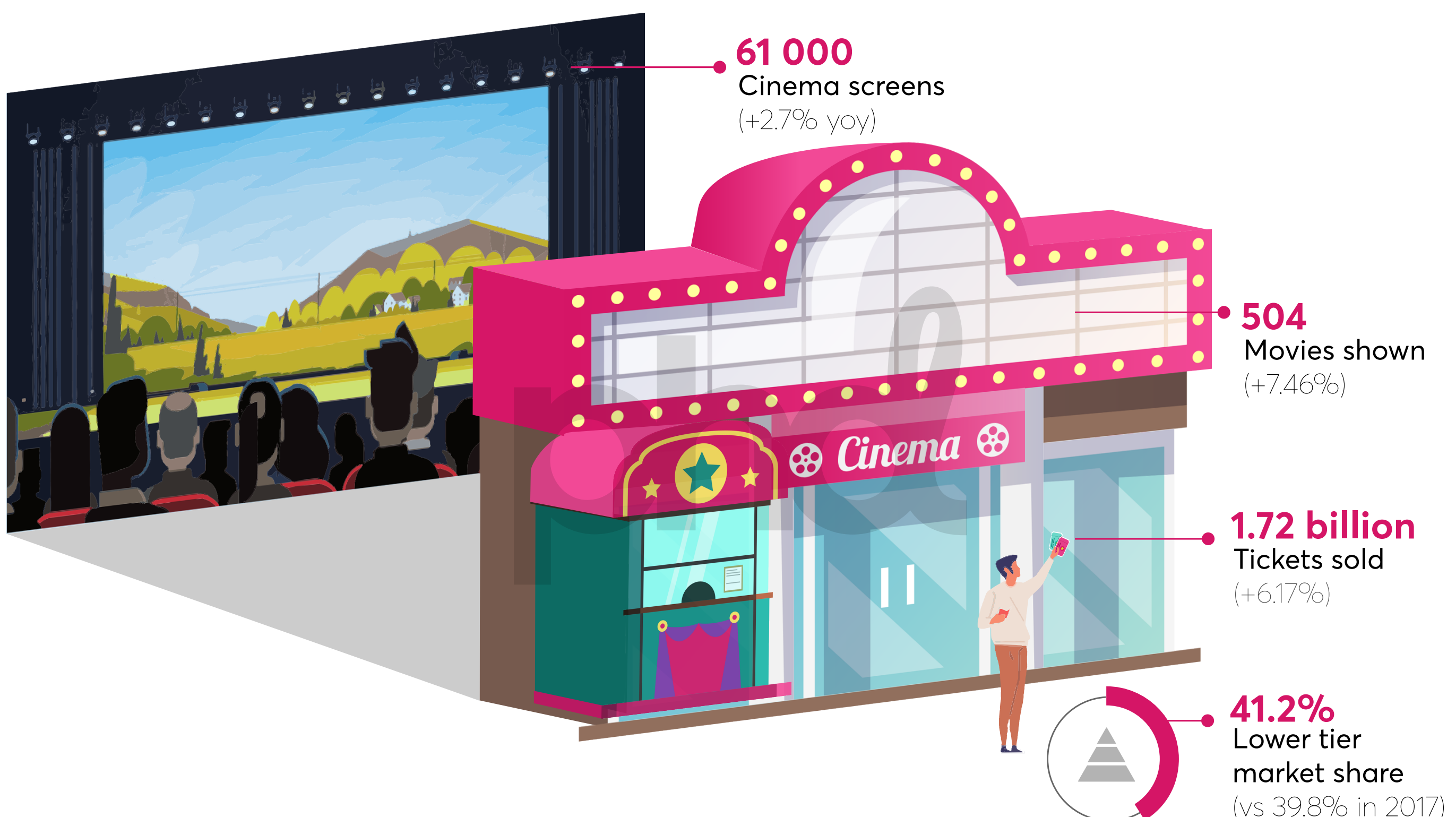


HOME APPLIANCES OOH VIDEO SPENDING GROWTH

+137%

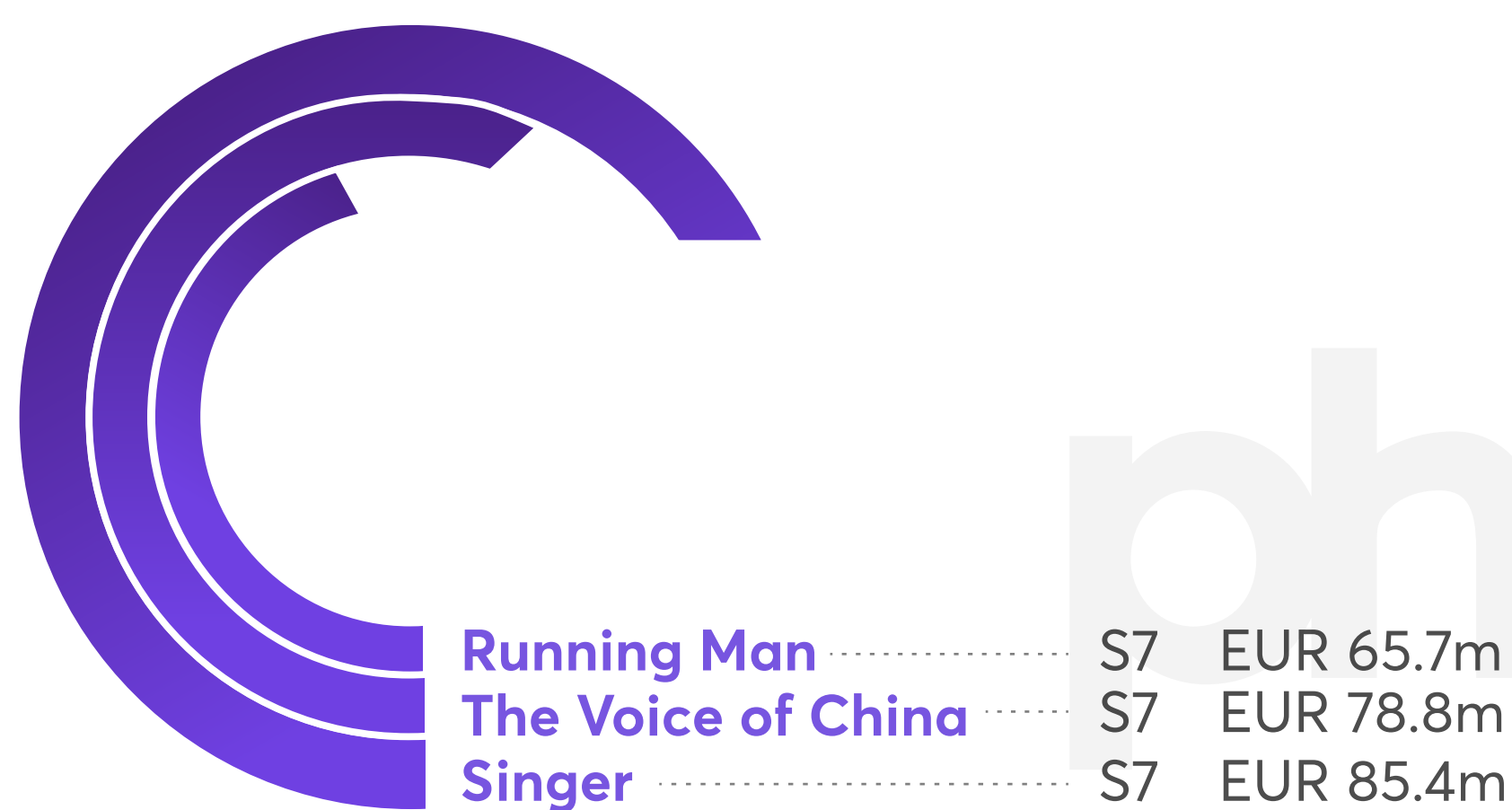


## CHINA CINEMA

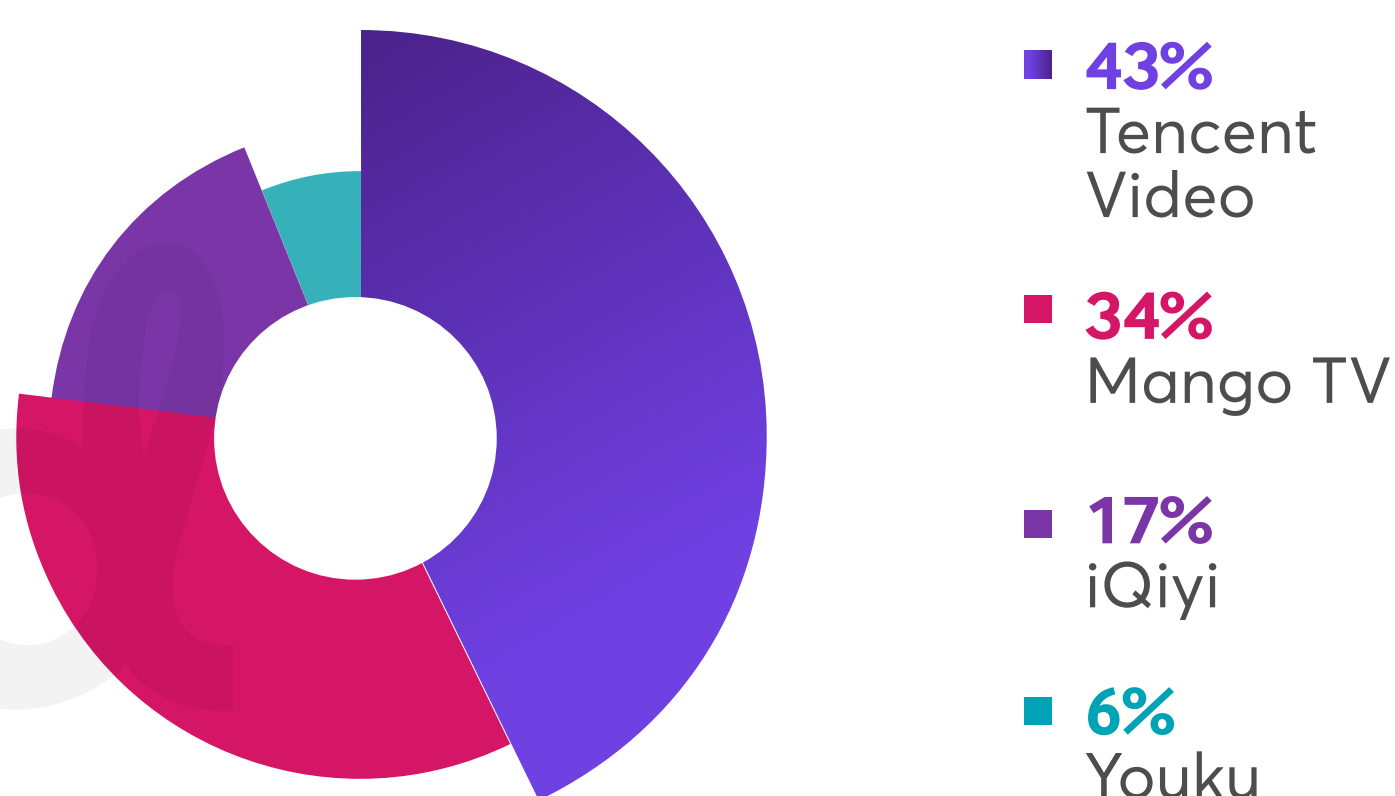


## CHINA CONTENT

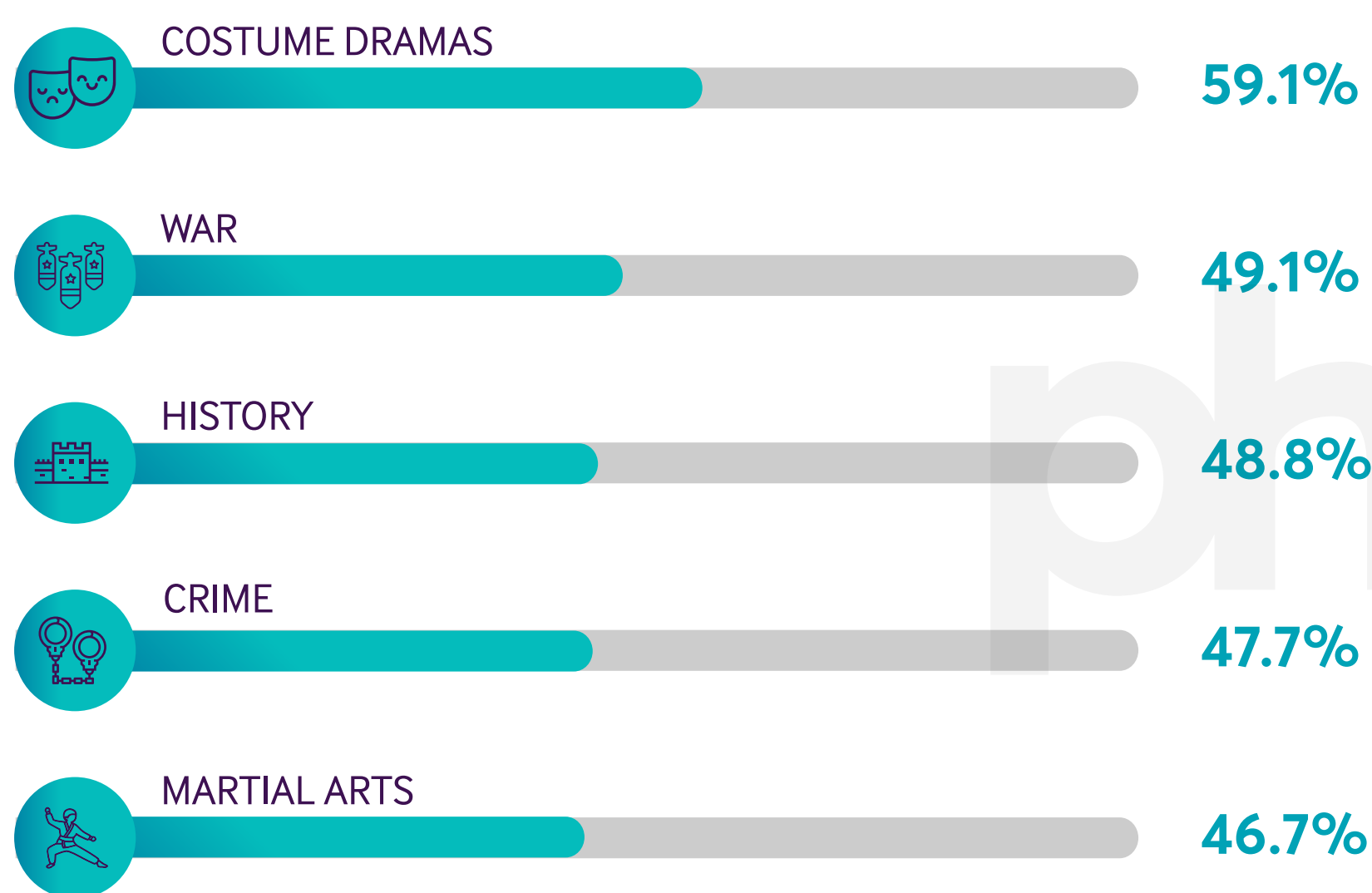
### TOP 3 SPONSORSHIP VALUE PROGRAMS



### TOP 4 ONLINE VARIETY SHOW PLATFORMS



### TOP 5 FAVORITE ONLINE SHOW THEMES



### TOP 5 ONLINE VARIETY SHOWS

Rank	Show	Online Video Platform
1	Produce 101	Tencent
2	The Coming One S2	Tencent
3	Idol Producer	iQiyi
4	Viva La Romance	Mango
5	Hot Blood Dance Crew	iQiyi

**RMB 60.3b**  
Idol industry market size (artist revenues)  
(+26.41% yoy)

**RMB 46.9b**  
Fan economy market size  
(+114% yoy)

## CHINA DIGITAL MEDIA

**829m** internet users

**27.7 hours** average weekly internet usage (+3% yoy)

**780m** use IM\* services in China

**USD 65.42b** China internet ad spending (+30.03% yoy)

**30 of 50** top apps belong to BATB companies

**583m** use mobile payment (+10.7% yoy)

**397m** order food on smartphone (+23.2% yoy)

**590m** view mobile video (+9.7% yoy)

**400m** book trips on mobile apps



**459m** play mobile games (+12.7% yoy)

**592m** shop on mobile devices (+17.1% yoy)

**54.7%** mobile users are from lower tier markets

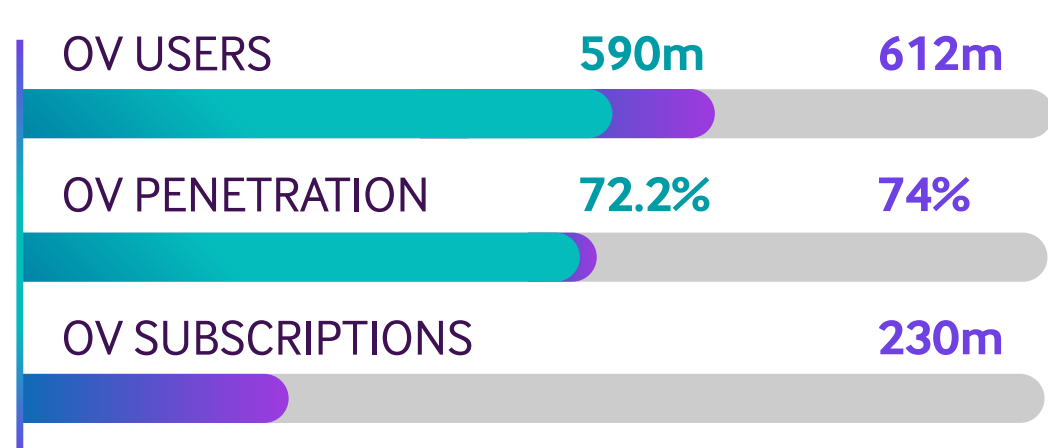
**98.5%** mobile internet penetration

**80%** search from mobile (+4.8% yoy)

\* Instant Message

## CHINA ONLINE VIDEO

MOBILE TOTAL



### TOP 3 PLATFORMS

- Tencent Video
- iQiyi
- Youku

### TOP 5 ONLINE VARIETY SHOWS

Rank	Video Platform	Ecosystem
1	Douyin	Bytedance
2	Kuaishou	Tencent
3	Xigua	Bytedance
4	Huoshan	Bytedance
5	Bobo Video	Yixia Tech

**700.3m** unique devices with short video apps

**651** short video apps emerged by 2018



# CHINA SOCIAL



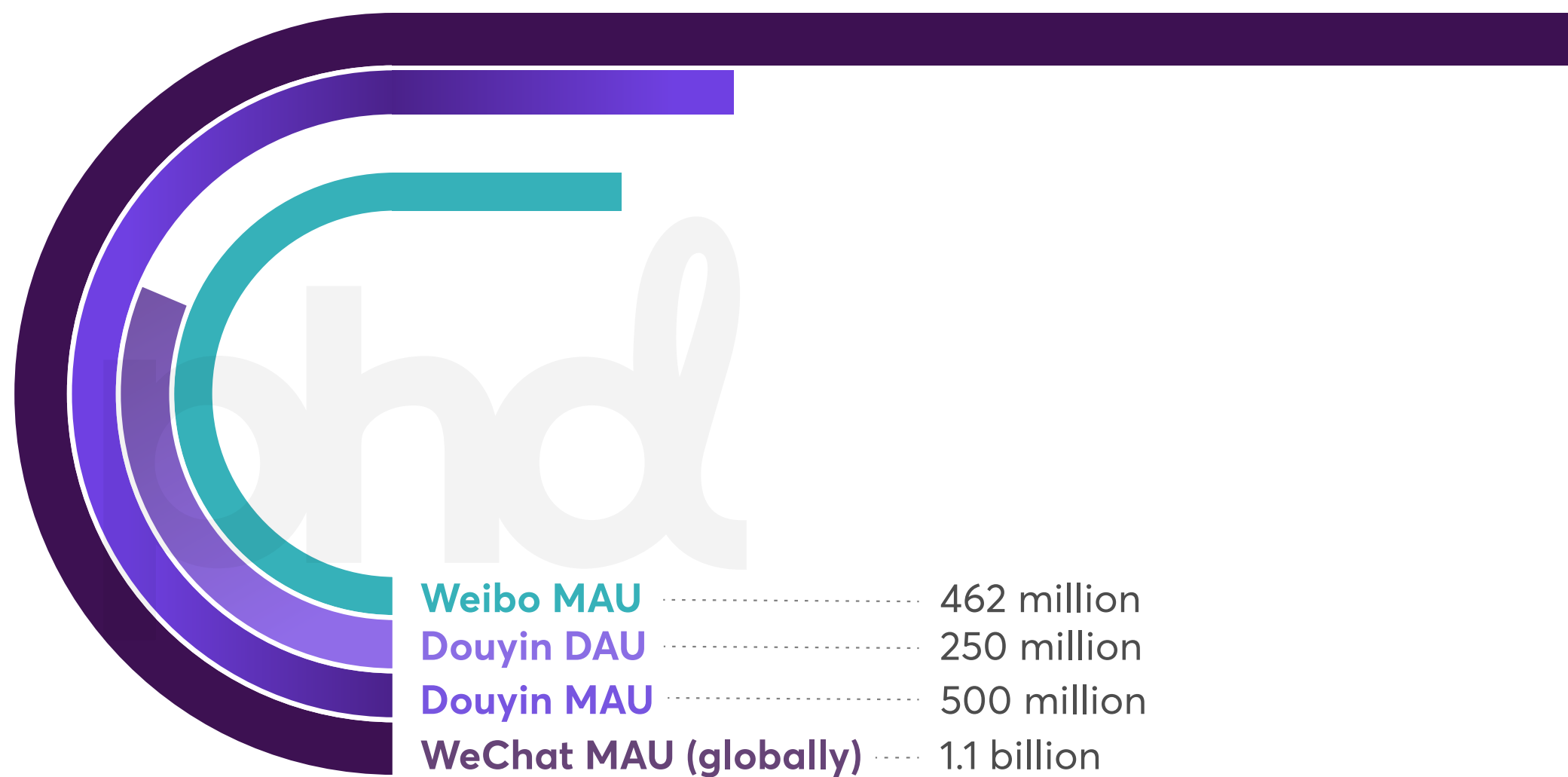
**45b**  
WeChat messages sent every day



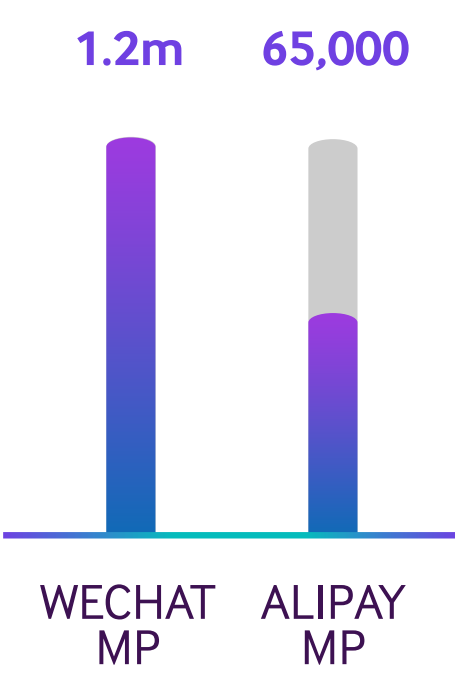
**780m**  
China IM users



**130m**  
Chinese characters posted on Weibo daily

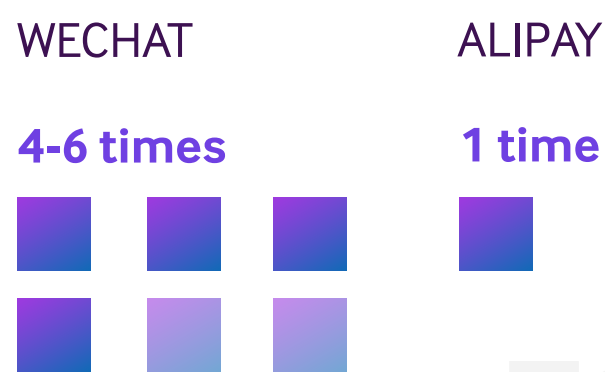


## MINI PROGRAMS

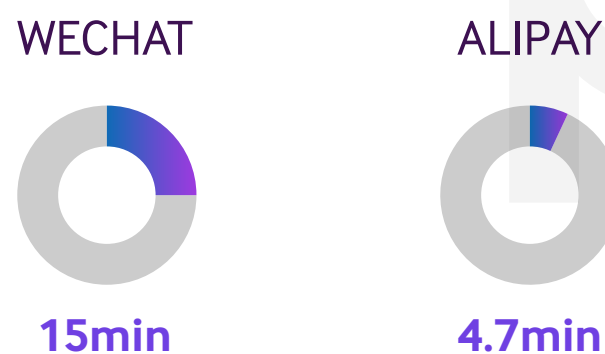


**380m**  
Alipay MP MAU

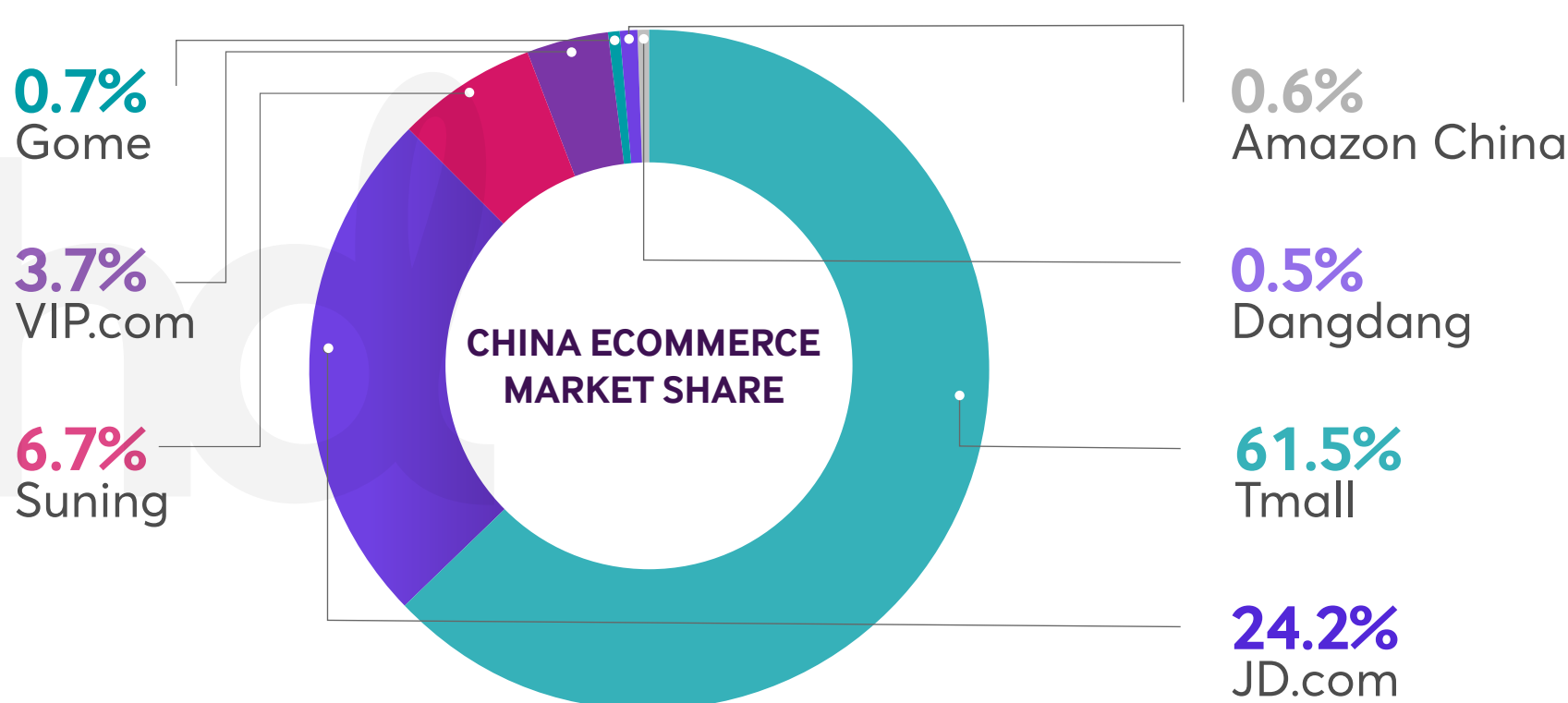
### DAILY FREQUENCY



### DAILY TIME SPENT

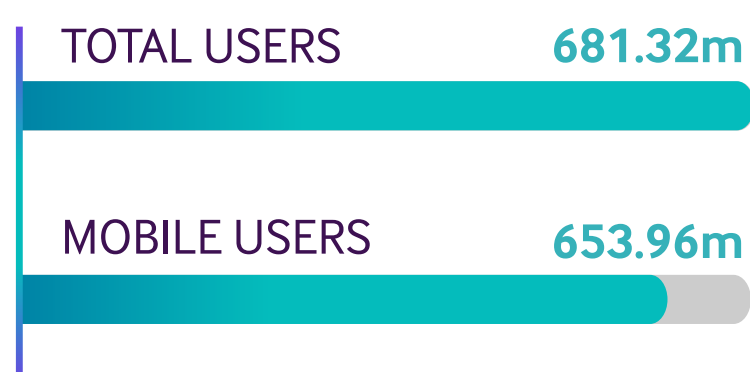


## CHINA ECOMMERCE

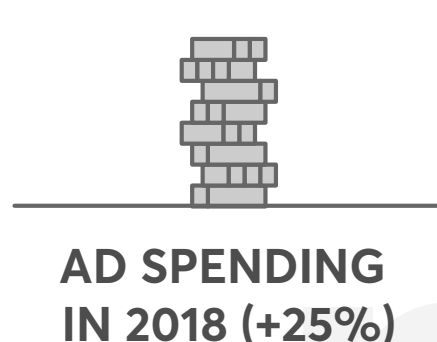


\*The currency rate is 1 USD = 6.90234 CNY as of May 21st

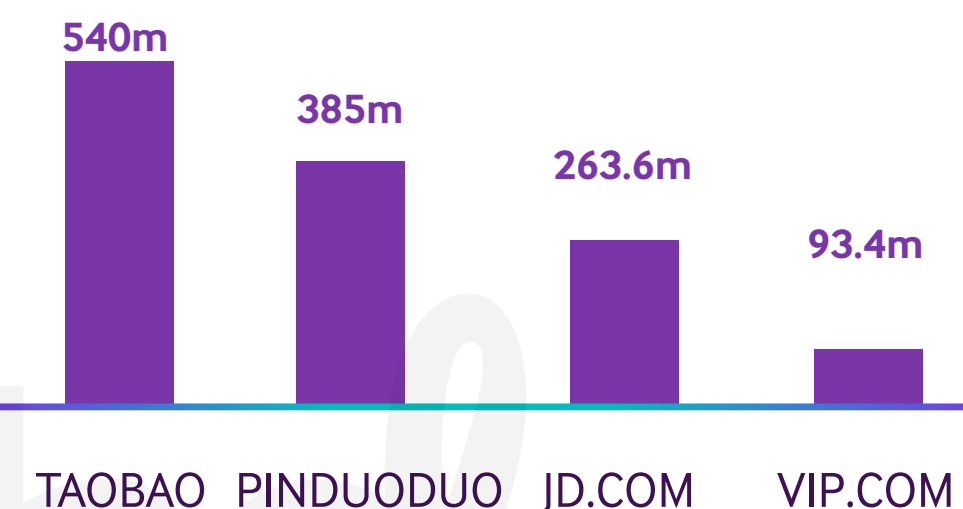
## CHINA SEARCH



**USD 26.17b**



### MAU

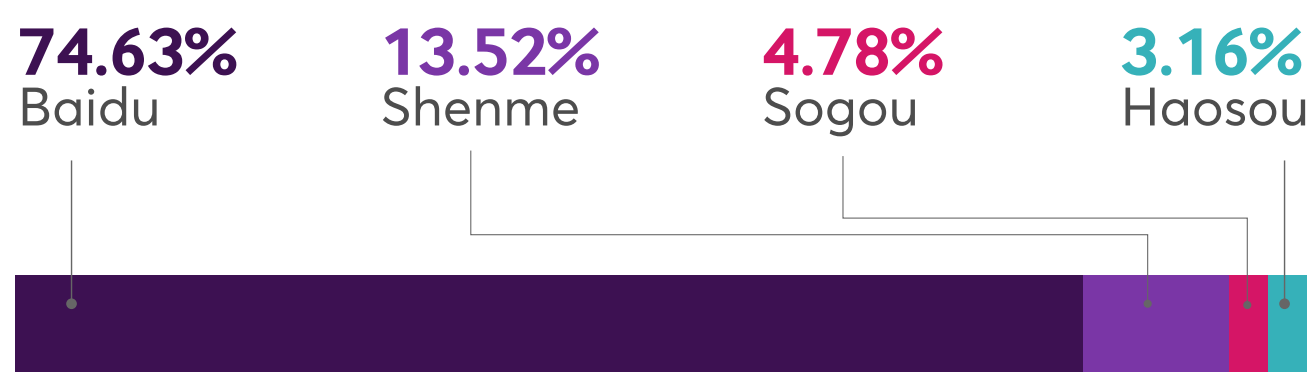


**RMB 213.5b**  
Alibaba's 2018 D11 revenues

**USD 1.526t**  
sales in 2018

\*The currency rate is 1 USD = 6.90234 CNY as of May 21st

## SEARCH MARKET



### ECOMMERCE PENETRATION



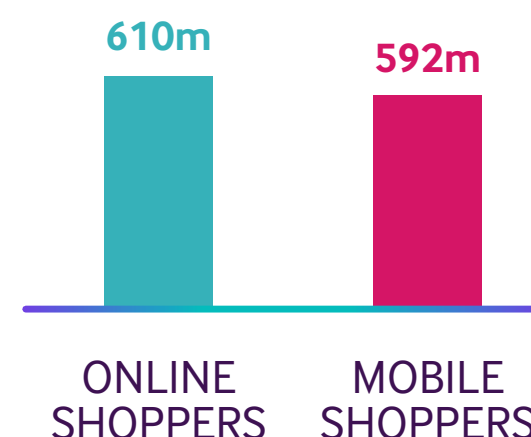
**73.6%**

### MCOMMERCE\* PENETRATION



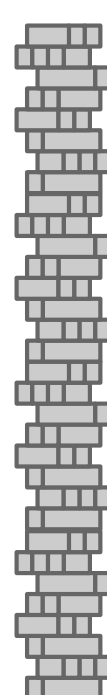
**72.5%**

\*mCommerce: Mobile Commerce  
\*Penetration of total internet users



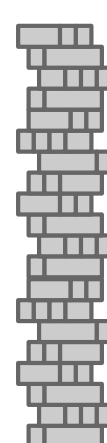
## CHINA PROGRAMMATIC BUYING

**USD 23.18b**



**DIGITAL DISPLAY SPENDING**

**USD 15.23b**



**DIRECT DIGITAL DISPLAY SPENDING**

**USD 17.40b\***

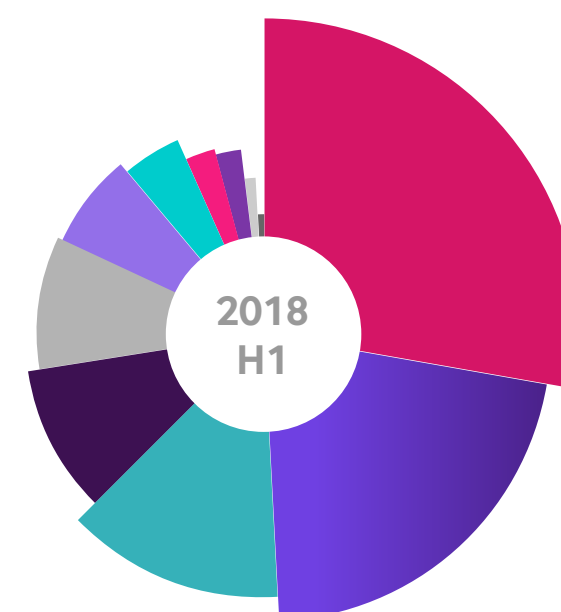


**DIGITAL IN-FEED SPENDING**

\*The currency rate is 1 USD = 6.90234 CNY as of May 21st

Sources: eMarketer, CNNIC, Analysys

## CHINA CROSS-BORDER ECOMMERCE



<b>Tmall</b>	27.8%	<b>NetEase Kaola</b>	21.4%	<b>JD</b>	13.5%
<b>VIP.com</b>	10%	<b>Other</b>	9.4%	<b>Amazon China</b>	7%
<b>Xiaohongshu</b>	4.3%	<b>Suning</b>	2.5%	<b>Jumei</b>	2.4%
<b>Fengqu</b>	1.1%				