

# 2023

## Guide to China Social Media Platforms

---



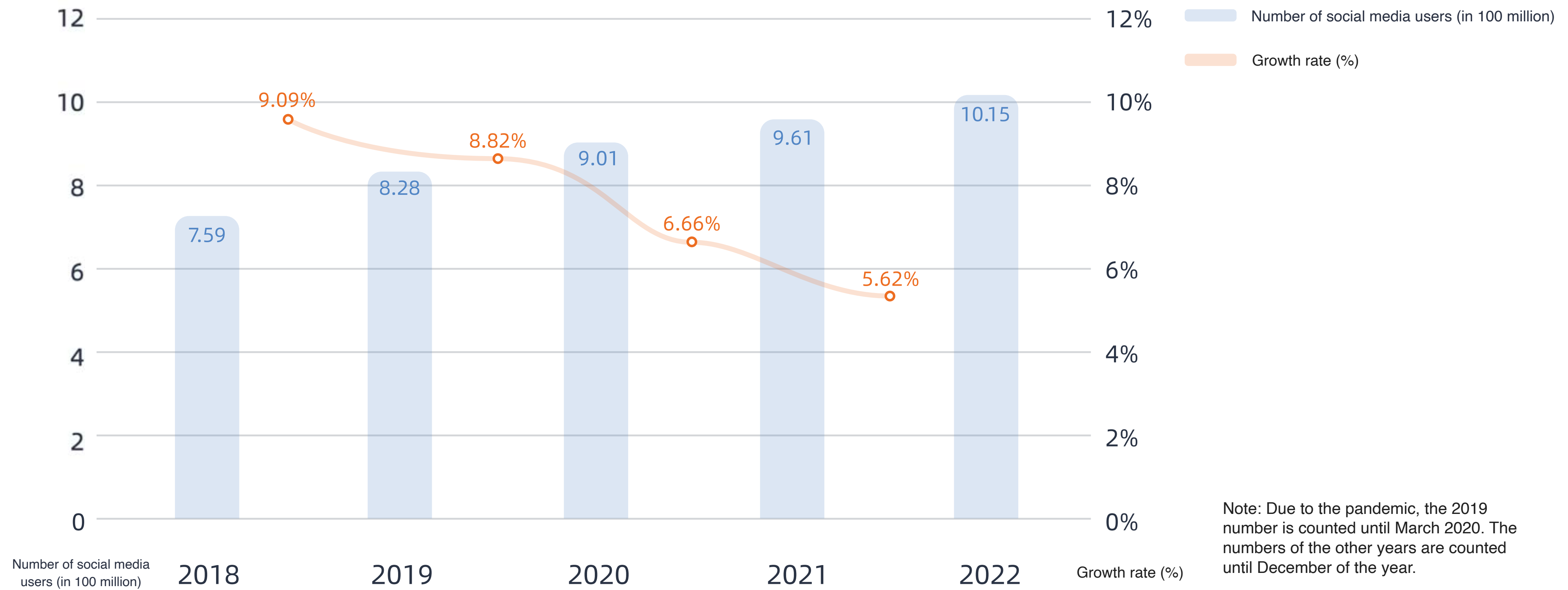
01

## Chinese social media trends

---

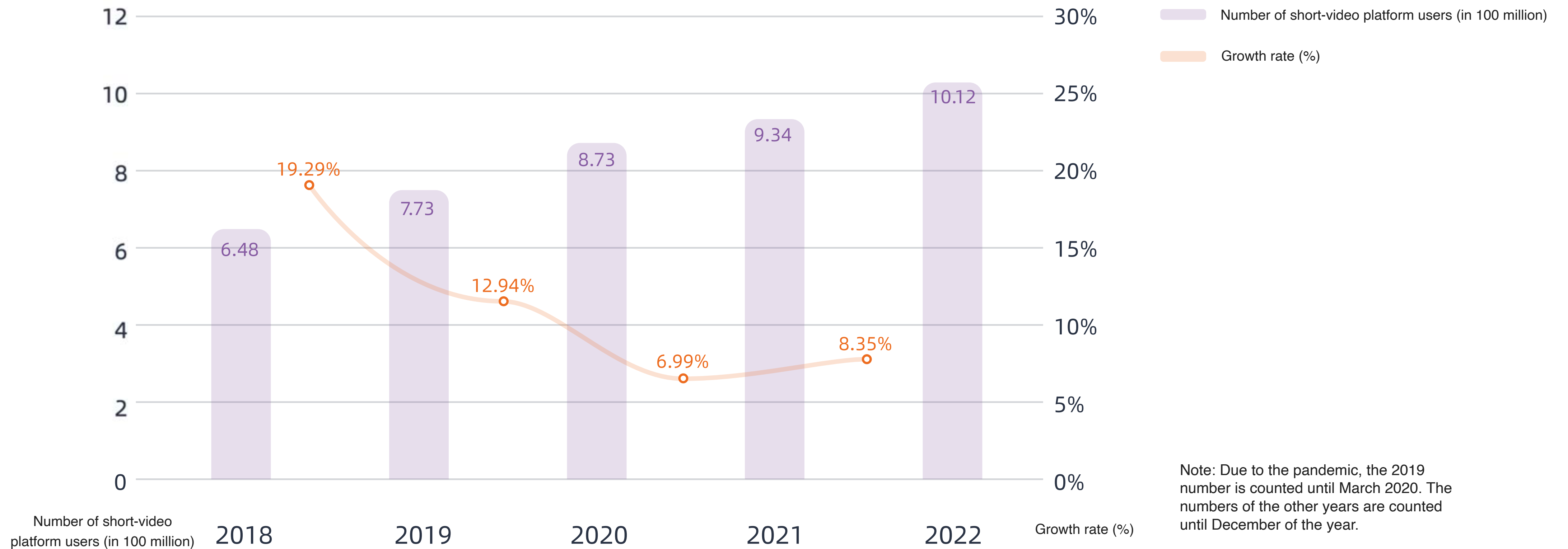
# Social Network Users in China, 2018-2022

As of December 2022, the Internet penetration rate reached 75.6% in China. The number of netizens in China exceeded 1.067 billion, and 95.13% of these netizens used social media. The average Internet user spent 26.7 hours a week on the Internet, and 99.8% of them used mobile phones to access the Internet. The era of mobile screens has been rapidly changing people's living habits, and the ever-evolving technologies have provided marketers many different possibilities to build social campaigns and achieve various business goals.



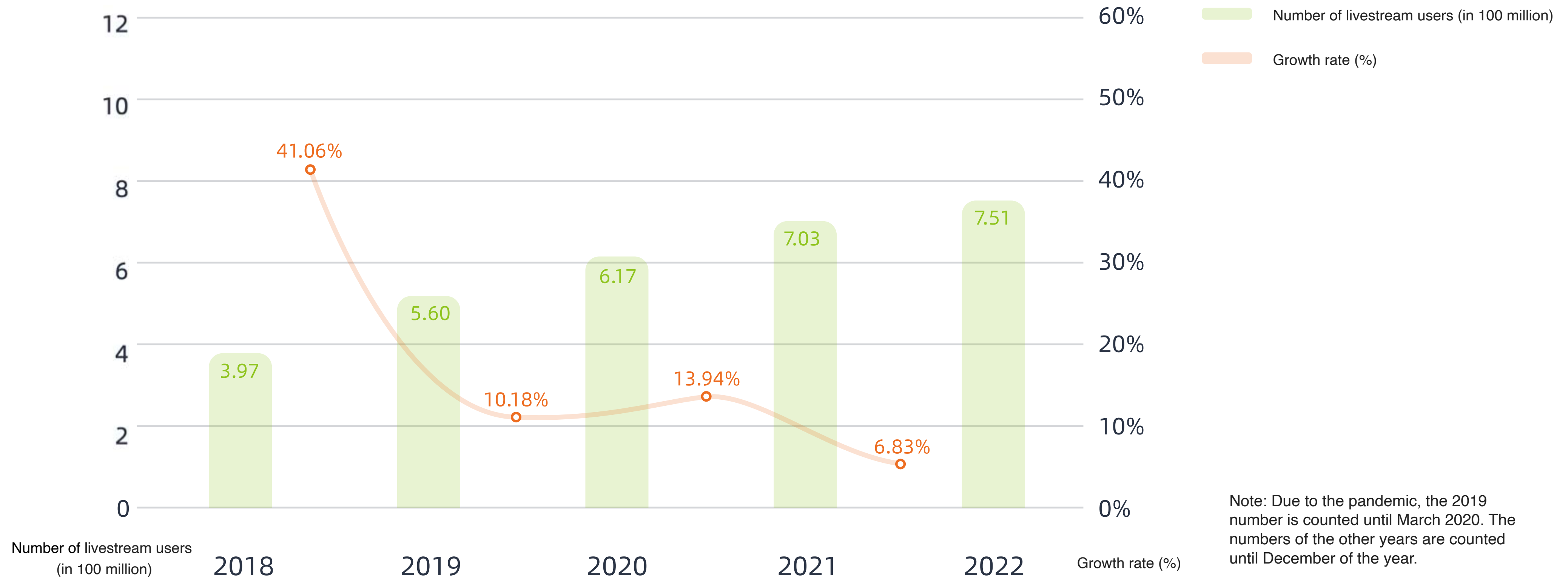
# Short-Video Platform Users in China, 2018-2022

As of December 2022, the number of short-video platform users in China accounted for 94.85% of all netizens and continues to grow. Compared with texts and graphics as well as long videos, short videos constantly capture users' attention because they can fully utilize the fragmented parts of their time and provide quick entertaining content. Douyin, Kuaishou and other short-video platforms have created the so-called "content e-commerce" model, and keep using high-quality short video content to promote the development of e-commerce.



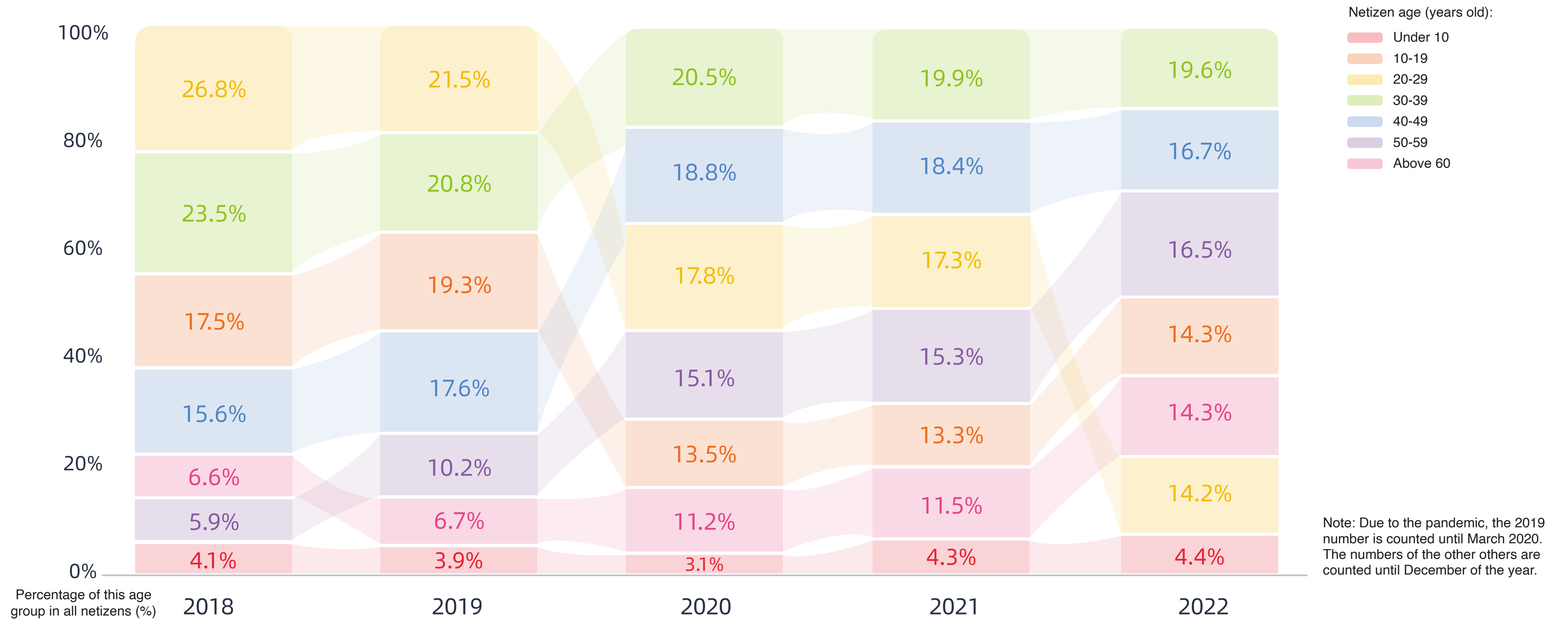
# Live-Streaming Users in China, 2018-2022

The high-quality streaming content, platforms' support and promotion policies, and the improving live broadcast technology to optimize the user experience have all contributed to the vigorous development of China's live-streaming industry and the continuous growth of users. As of December 2022, 70.38% of Chinese netizens watched live-streaming videos, and 48.27% of Chinese netizens used live commerce. More and more people shop, study, and entertain through live streams.



# Age Distribution of Internet Users in China, 2018-2022

With the rapidly aging population and the widespread use of the Internet, many elderly Chinese are now a major force of the internet users. As of August 2022, the number of monthly active users (MAU) over the age of 50 reached 297 million, a year-over-year increase of 12.5%, and the average monthly usage time per capita was 121.6 hours, a year-over-year increase of 8.6%, which was much higher than the average 2% growth rate of the entire population. 66.67% of the 50 and older netizens could afford products or services with a 1,000+ yuan price tag, and these netizens also accounted for 69.02% of those with median and high consumption willingness. The user habits and consumption scenarios of middle-aged and elderly netizens deserve more attention from brands.



## 8 China Social Media Trends to Follow in 2023

### 1 Content regulation is becoming increasingly strict

With the development of diversified content forms, various content regulations have emerged in an endless stream, and content compliance is becoming more and more important. While complying with relevant national regulations, it is necessary to take into account the different rules of each social network.

### 2 Social media are used as search engines in China

Social media have replaced Baidu as search engines in China to a large extent. Users have become accustomed to using social channels such as WeChat, Xiaohongshu, Douyin, and Zhihu to look for the information they need.

### 3 Short videos are still the mainstream content format

For brands and individuals, the production cost of short video content is relatively low, and it can bring about widespread dissemination in a short period of time. The unique advantages ensure the short-video format will continue to grow for a while.

### 4 Social media continue to get commercialized

Social media content has been used to drive the development of e-commerce. Multiple social networks such as WeChat Channels are accelerating their commercialization. Live broadcasting has further propelled the development of social e-commerce.

### 5 China's "Silver Economy" is here to spend, on Social

With the rapidly aging population and the widespread use of the Internet, elderly Chinese are now a major force of internet users. Their buying power can no longer be ignored. Social networks such as Meipian, Xiaohongshu, and Douyin continue to attract middle-aged and elderly users.

### 6 Podcasting is on the rise

More brands have started podcasting. The podcast content can also be adjusted and reused on other social media in content forms such as graphics, long and short videos, and vice versa.

### 7 Social media is an important entry point for omni-channel marketing

Connecting the traffic between social media platforms, between social media and media on the Internet, between public traffic and private traffic blur the boundaries of online marketing and offline marketing, and help brands to create seamless omni-marketing opportunities.

### 8 Influencer marketing and word-of-mouth marketing remain powerful

China has taken influencer marketing to a whole new level. It is not uncommon that a single live stream of a KOL can bring in GMV of millions of dollars. KOCs are also employed for word-of-mouth marketing. The impact of these non brand-owned social accounts have shown very strong performance.

#### KOL

Key Opinion Leader

Content creators who have built their following on social media networks. There is no single standardized definition — a KOL can be a blogger, content creator, influencer, wanghong, vlogger, live streamer... KOL are in the business of building and monetizing influence and not necessarily true fans of the brands they work with.

#### KOC

Key Opinion Consumer

Sometimes called "micro-KOL", these are actual consumers with genuine brand loyalty. They evangelize the brand and guide their audience on better purchase decisions through word-of-mouth and user-generated content. KOC may be smaller and less polished than KOL but build more customer lifetime value.

002

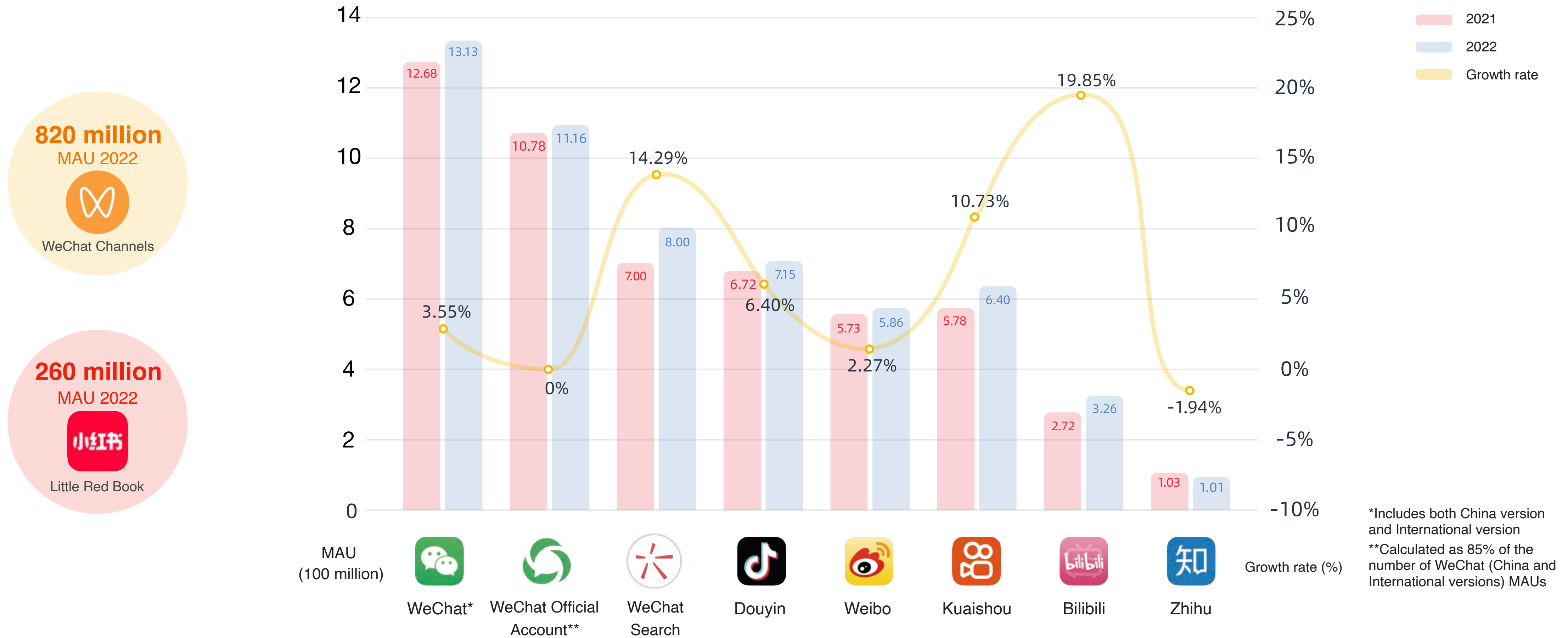
## Chinese social media platforms

---















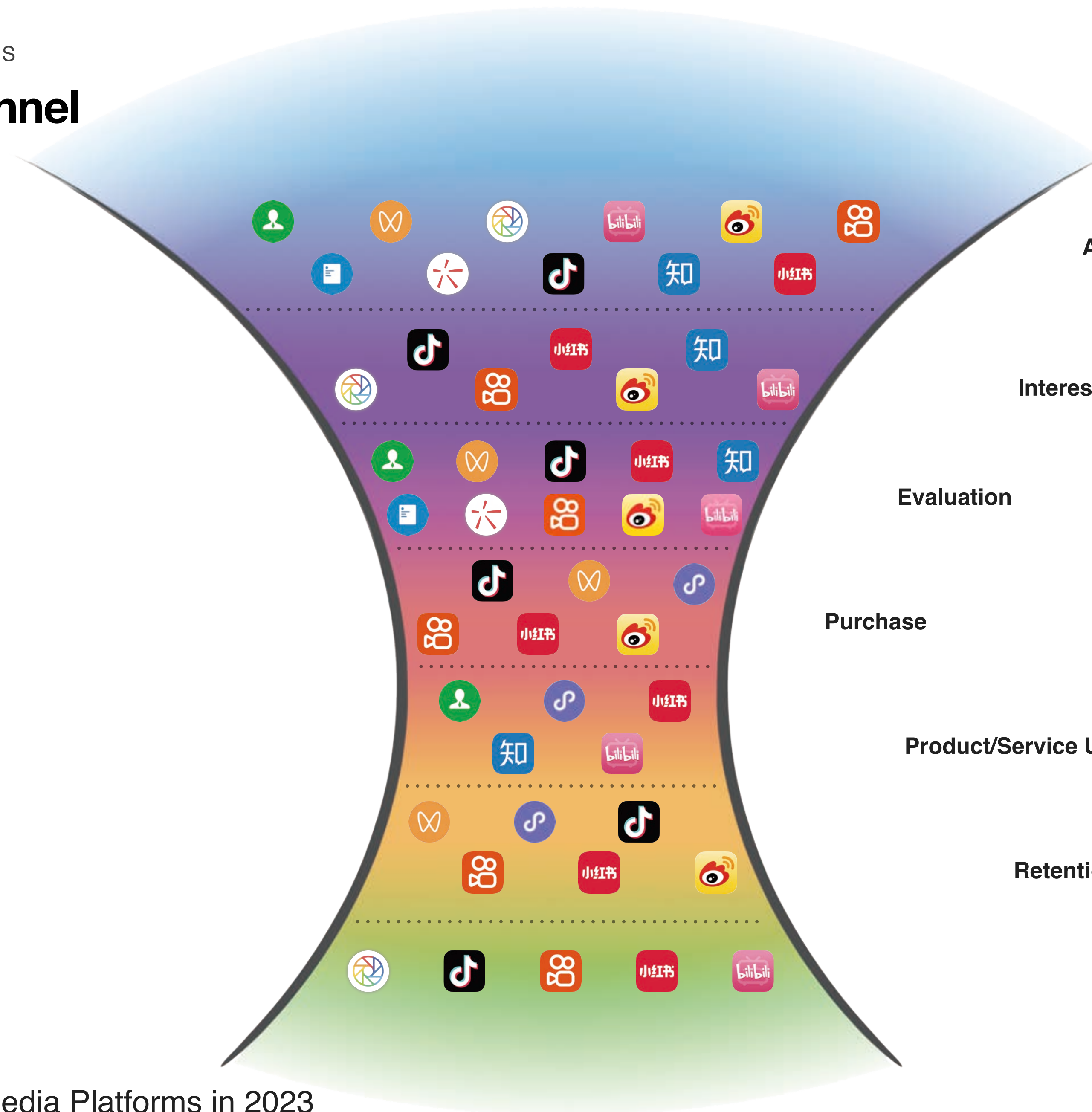
# Social Network Monthly Active Users

China's mega-platform WeChat and its ecosystem maintain a leading position in traffic. The number of WeChat Search users has increased significantly. The MAU of WeChat Channels in 2022 was 114.69% and 128.13% of Douyin and Kuaishou, respectively. Zhihu's average MAU fell below 100 million in 2022, but the average number of monthly paying members reached 10.9 million, double that of 2021. High-quality content will continue to increase users' willingness to pay.



# Social Media Marketing Funnel

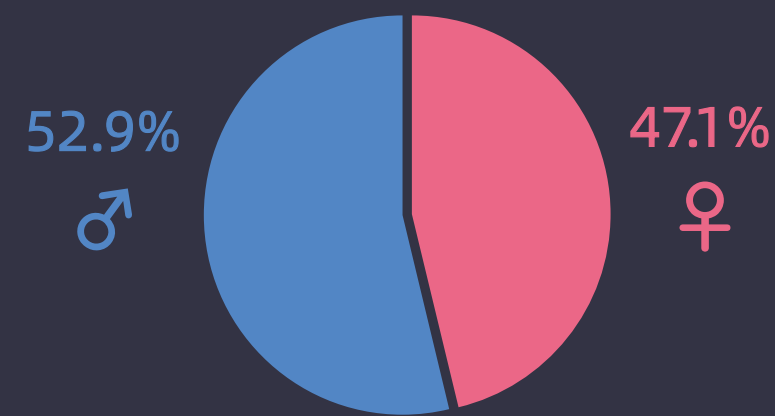
-  WeChat Service Account
-  WeChat Subscription Account
-  WeChat Channels
-  WeChat Search
-  WeChat Mini Programs
-  WeChat Moments
-  Douyin
-  Kuaishou
-  Little Red Book
-  Weibo
-  Zhihu
-  Bilibili



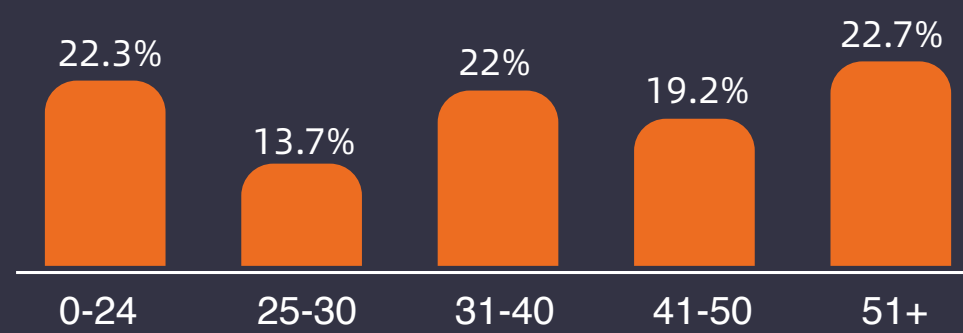


# WeChat

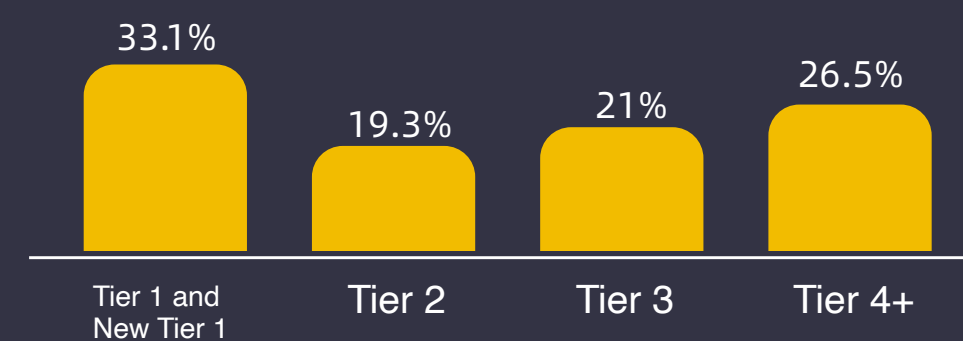
Gender



Age



Geographic Location



## From WeChat App to WeChat Ecosystem

Scanning codes to add friends, voice and video calls, building group chats, exchanging pictures... The emergence of WeChat has changed the way people socialize. Today, it has grown from an instant messaging tool to a towering tree of the WeChat ecosystem, penetrating into every aspect of life and changing people's lifestyle. Each branch of the ecosystem has its twigs and leaves, and at the same time connects with each other.

The WeChat Mini Shop under the WeChat Mini Program has successfully drawn many merchants to join and set up their online stores; the customized WeChat red envelope cover in WeChat payment has become a new way of brand marketing. WeChat Search from Public Traffic\* is connected with WeChat Official Account, WeChat Channels, Moments, mini programs, live stream, etc. from Private Traffic\*\*; WeChat and WeCom are connected, while WeCom is integrated with the other branches of the WeChat ecosystem such as Tencent Meeting and Tencent Docs. Via mini programs, WeChat users can seamlessly be connected and use other platforms such as Didi, Meituan, JD.com, Pinduoduo, Shell House Search, Maoyan Movie, and other social media platforms such as Weibo, Zhihu, and Bilibili.

With the launch of the youth model and the care model for the elderly and the visually impaired, the audience of the WeChat ecosystem has covered the entire population.

Where there are people, there is marketing. Thanks to the vast number of users in the WeChat ecosystem, both B2C and B2B brands can use the platform to their advantages, design marketing campaigns, drive traffic among different channels, and realize conversions.

### \* Public Traffic

公域流量 *gōng yù liúliàng*

Channels or touch points, typically on large platforms, that allow you to reach a wide range of customers. On the downside, they are more restricted (e.g. algorithmic) and have higher acquisition cost.

### \*\* Private Traffic

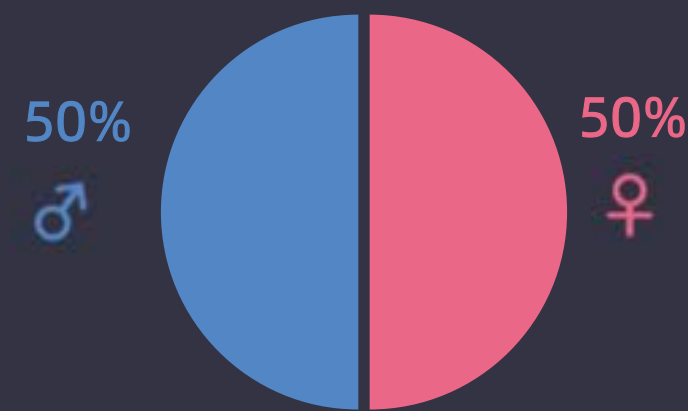
私域流量 *sī yù liúliàng*

Channels or touch points with customers where you have greater control and negligible costs. Suitable for community management and retention marketing.

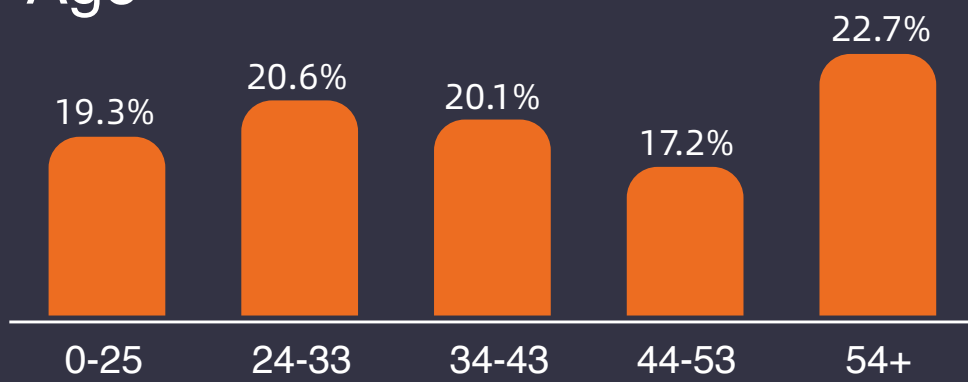


# WeChat Channels

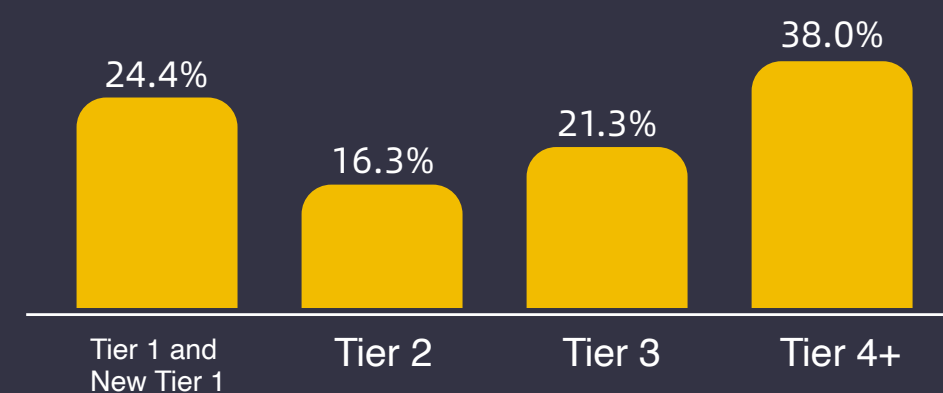
Gender



Age



Geographic Location



## A Rising Social Commerce Platform

As a result of its positioning change, WeChat Channels has once again demonstrated its intention to grow commercially, shifting from a "pan-information-based content platform" to a "diversified and symbiotic national consumer platform", offering creators, merchants, and service providers new opportunities.

Traffic and audience on WeChat Channels tend to reward content that is original, created by customized accounts, and close to real life, as well as content from accounts with strong and vivid personalities.

For live streaming, high-quality content from different verticals brought expeditious increase in audience, watch time, streaming time, etc. By launching WeChat Channels Stores (视频号小店), WeChat Channels Optimization Alliances (视频号优选联盟), and various merchant operation tools, the platform also has made significant efforts to promote live commerce. The top three categories of transactions on WeChat Channels are apparel, food, and beauty, while digital home appliances, education and training, home decor, and personal care products are expanding rapidly; Female users from China's Tier 1, 2, and 3 cities have a greater purchasing power when it comes to live broadcasts on WeChat Channels. In addition, WeChat Channels will launch incentive programs to attract more high-quality merchants.

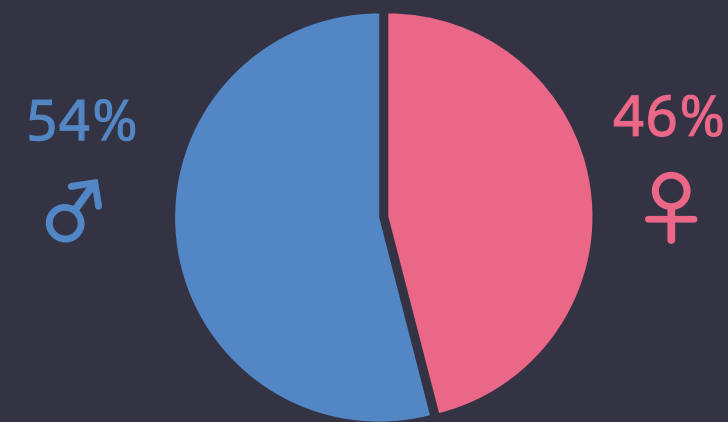
Though WeChat Channels is a late player in terms of launch time and commercialization compared to Douyin and Kuaishou, the powerful WeChat ecosystem and the highly-engaged WeChat users have led to a rapid increase in WeChat Channels users, usage time (which has exceeded that of WeChat Moment) and gross merchandise volume (GMV increased by more than eight times from last year in 2022). All point that WeChat Channels has a great potential and a huge new market to explore.



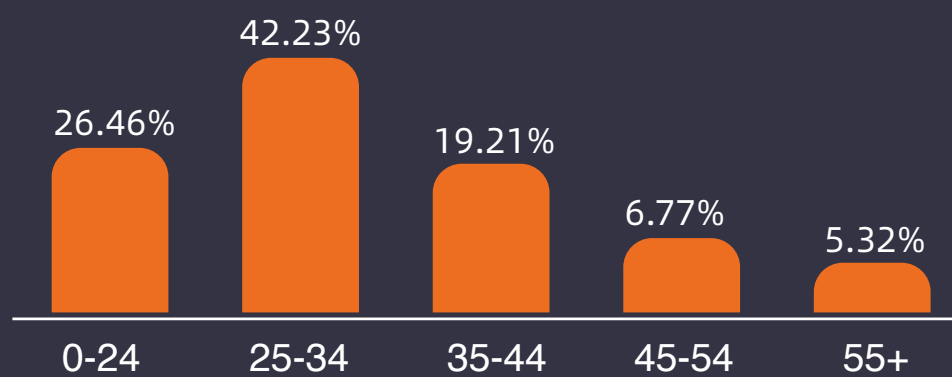


# Douyin

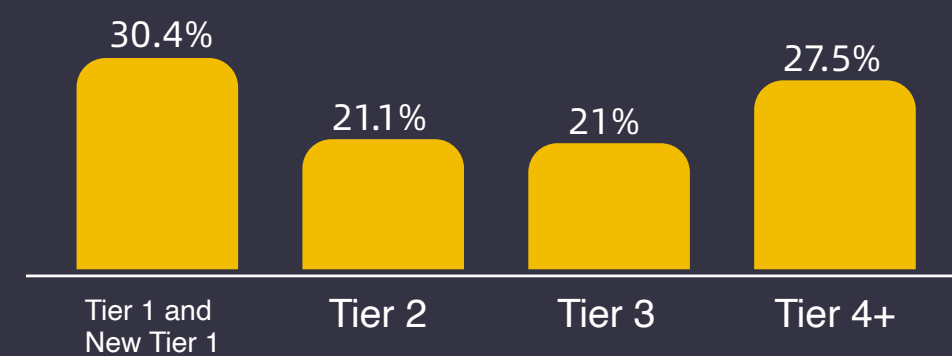
Gender



Age



Geographic Location



## The Social Commerce Frontier

Launched as a short video social media platform featured with music and creative content in 2016, Douyin brought many songs, dances, cities, and talents to fame. With continuous technological advancements and supply chain improvements, Douyin built a powerful social commerce ecosystem, redefining social media as well as e-commerce.

2020 marks the start of the era of live streaming e-commerce in China. Live shopping is the most important format for Douyin e-commerce. Consumers' preferences for content have changed dramatically in recent years, from images and texts, to short videos, to live broadcasts, and as a result, consumers' shopping habits have changed as well. Today, Douyin is a hot topic B2C brands almost never ignore. As East Buy Holding (东方甄选) live selling farm produces with its unusual poetic style, and luxury brands like Louis Vuitton and Gucci joining the platform, Douyin has opened up new possibilities for social commerce. Brands add authenticity and accessibility through live streaming, with yelling and hard selling in the live broadcast room replaced by on-brand interior layouts and live speech skills matching the brand tone. The value of brands and products can be intuitively and comprehensively felt by users before they make the purchase decisions.

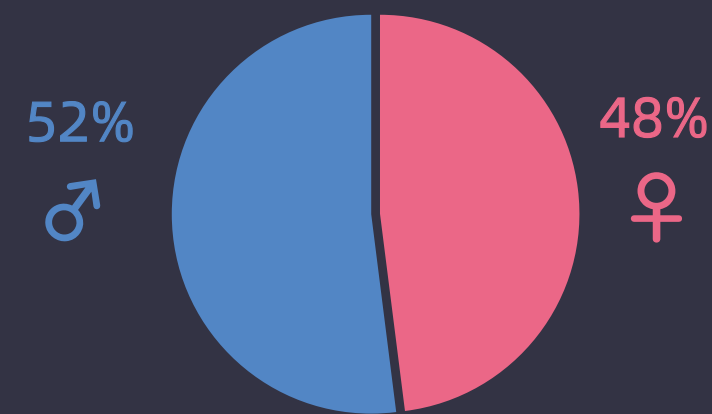
A new set of rules was introduced by Douyin in February 2023 that makes opening a shop easier for individual sellers, such as allowing new merchants from certain categories to join for free. All these measures will help Douyin further expand its e-commerce business.



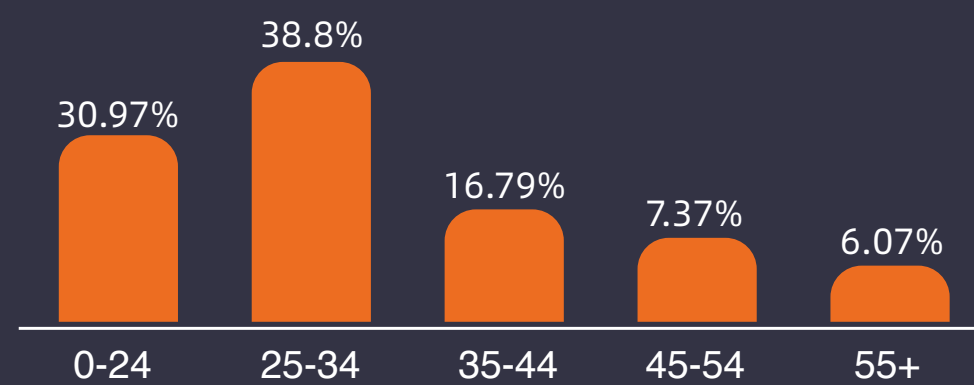


# Kuaishou

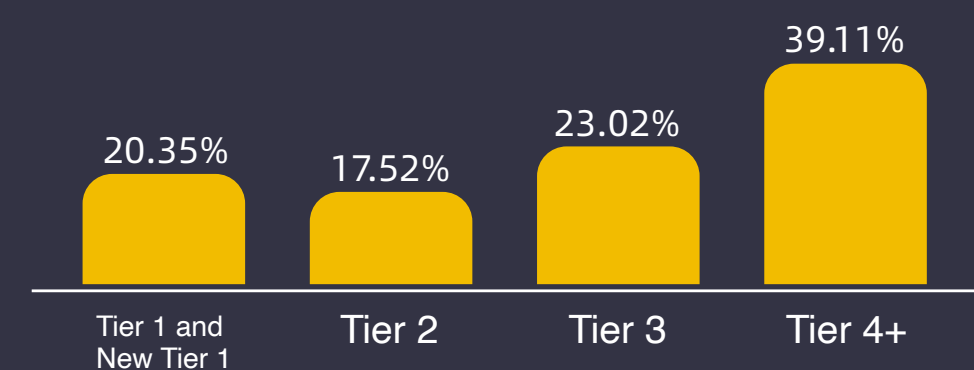
## Gender



## Age



## Geographic Location



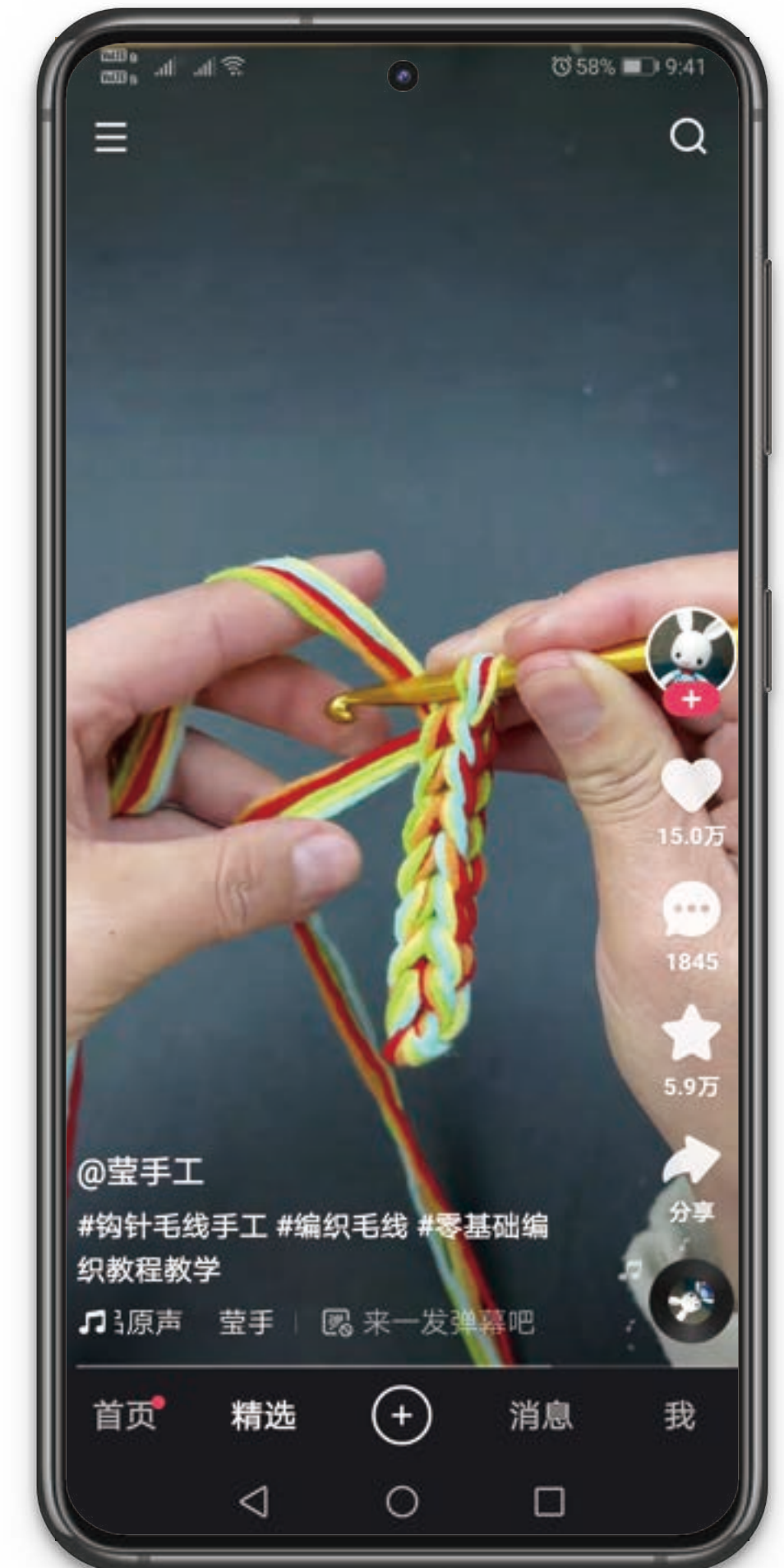
## Embrace All Lifestyles

Kuaishou began as a simple tool for creating and sharing GIFs, but has now evolved into an ecosystem that combines short videos, live streaming, and e-commerce.

According to China's Seventh National Census, 80% of the population lives in second- and lower-tier cities, where fewer entertainment options are available than in Tier 1 and New Tier 1 cities; in turn, they spend more time on social media. Compared to Douyin, Kuaishou users come from less developed cities, which means the content on Kuaishou is more down-to-earth and closer to the life of the majority of the Chinese population.

Many Kuaishou creators have a grassroots origin. The decentralized algorithm and recommendation mechanism of the platform provide them opportunities to become KOLs and KOCs. Kuaishou's "old pal" culture also allows creators and users to get acquainted and become friends.

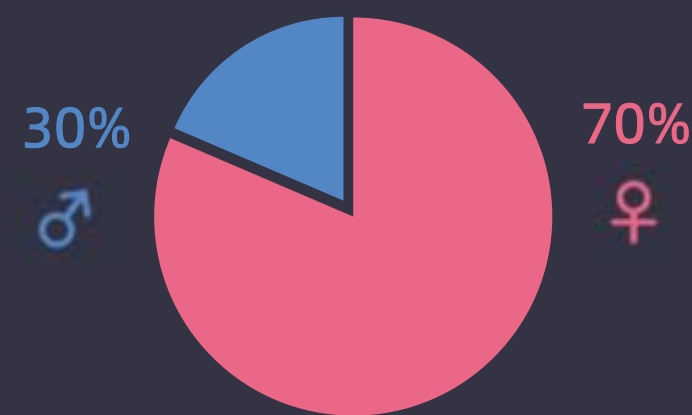
While the trendsetting Douyin leads with its focus on "beautiful life", Kuaishou creates an entirely different community culture with users' natural trust in each other. Kuaishou's motto is to "embrace all lifestyles." It focuses on real people's life. Users hence have a stronger sense of belonging and resonance, enabling Kuaishou to boast more social attributes.



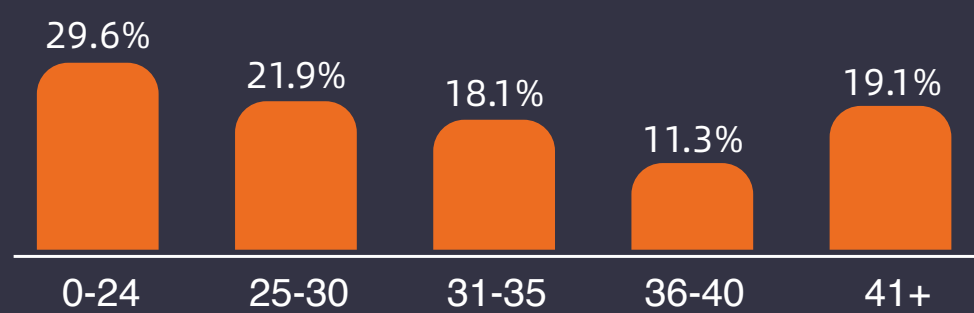


# Xiaohongshu

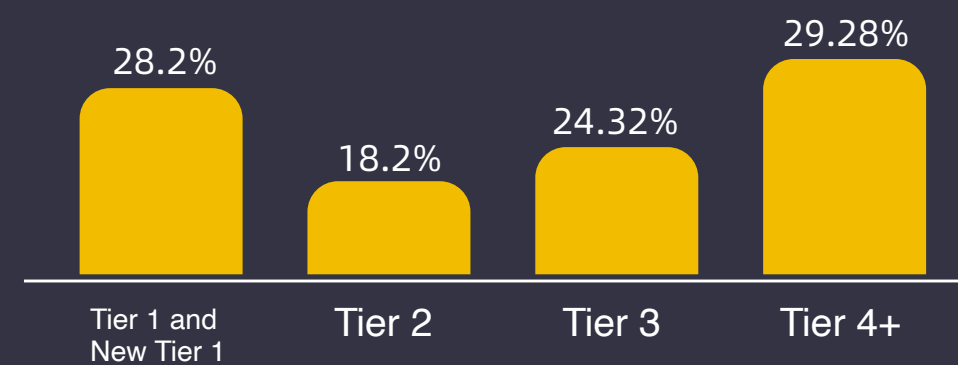
Gender



Age



Geographic Location



## The Encyclopedia to Help Make Buying Decisions

The lifestyle-sharing and "seed-planting" platform, Xiaohongshu, originally started as a content community to share reviews and guides to purchasing products overseas. As the community platform with the strongest "seed-planting" mentality in China, Xiaohongshu has gradually grown into a full-cycle e-commerce platform.

Xiaohongshu users have enormous spending power, focus on quality of life, and love to share. The user-generated content on Xiaohongshu represents different lifestyles and relates to many scenarios in our daily lives, which is known to have a high stickiness and sense of trust among users. In comparison with other social networks, Xiaohongshu users frequently ask "how to buy" questions. They often browse related notes and search on Xiaohongshu before placing an order. As compared to traditional e-commerce, Xiaohongshu's "seed planting" path is shorter, from Consideration ("seed" products), to Action (buy products), to Share (share experience).

Though Xiaohongshu has special programs to help video content grow and videos are a very popular format throughout the entire content creation market, text-based content on Xiaohongshu has a higher conversion rate, consumption efficiency, and lower return rate than video because notes in text format have higher information density and are easier to search, read, and create on Xiaohongshu.

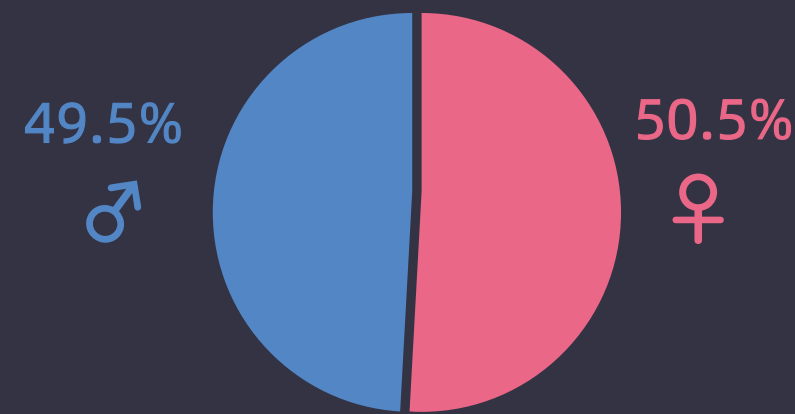
In total, more than 140,000 brands joined Xiaohongshu. In February 2023, the social network debuted its "TrueInterest" indicator, driving a measurable approach to seeding recommendations. The indicator is believed to become one of the new metrics that brands will use to analyze the performances of marketing on Xiaohongshu.



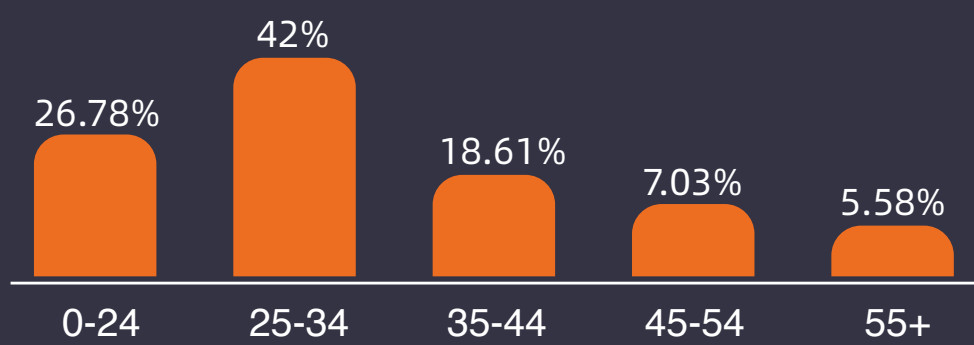


Weibo

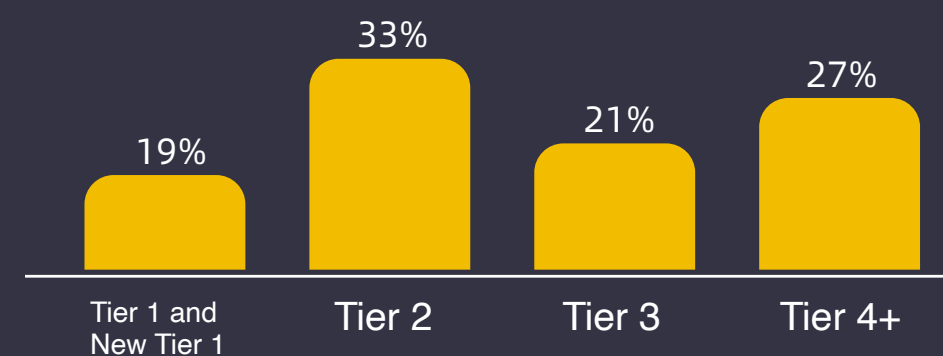
Gender



Age



Geographic Location



## Social Fission Marketing on Weibo

Founded in 2009, Weibo has experienced ups and downs. Despite fierce competition for traffic among major social media platforms, Weibo relies on the genes of the Sina web portal and a commercialization model that began earlier and has clearly evolved into a hotbed for breaking news, latest headlines, celebrity and entertainment updates, film and television, and so much more.

Content on Weibo is always relevant and timely. If WeChat provides social interaction between friends and acquaintances, what Weibo offers is a topic-based connection between strangers. As its slogan goes "Discover new things anytime, anywhere", top searches, hashtags, and super chats in Weibo can create instant interactions on a large scale, creating a fissionable effect. Moreover, the short content format and unlimited posting frequency made it easier for content creation, reads, and views – you can make a point with a sentence, an image, or even just one word. Content formats such as lottery draws, voting, and comments increase engagement and such engagement takes place not only between brands/creators and users, but also among users, allowing the content to spread further and further.

Coupled with its advantages especially its ability to quickly spread information, Weibo is suitable for topic marketing, word-of-mouth marketing, celebrity marketing, and emotional marketing. Brand value can be spread through simple yet interactive content, reducing the distance between users and brands.

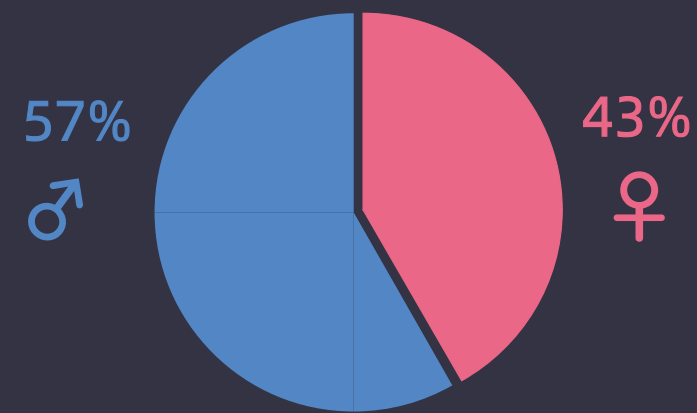




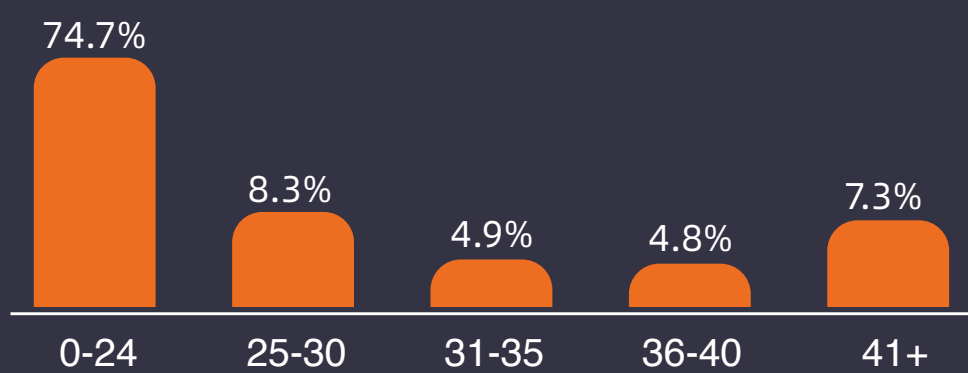


# Bilibili

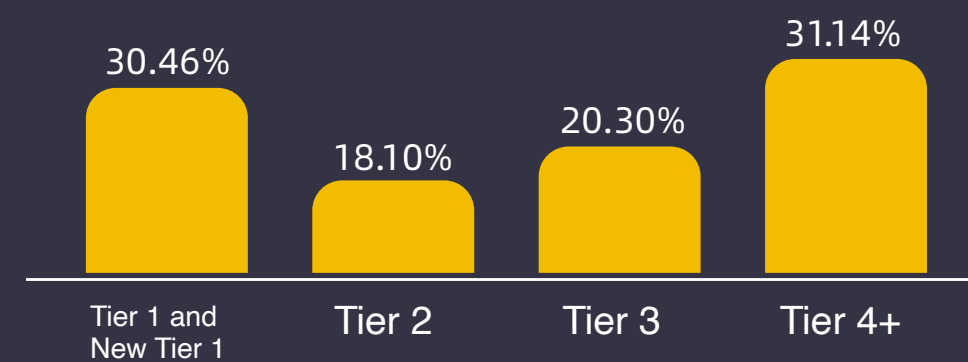
## Gender



## Age



## Geographic Location



## A “Little Broken Site” for Subcultures But More

Affectionately called by users a "little broken site" for its unstable connection back then, Bilibili started with a focus on ACG – anime, comics, and games and is now a major player with long video content.

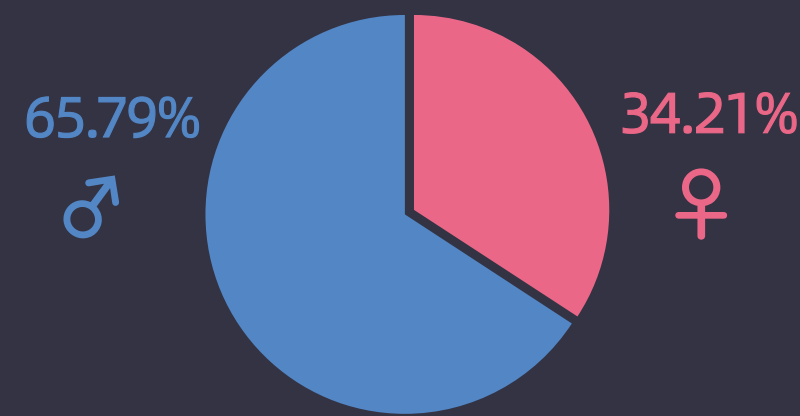
Unlike other long video platforms like iQiyi, Youku, and Tencent, Bilibili's unique subculture focus, "barrage culture (弹幕文化)", and strong learning atmosphere have attracted many Gen Zers (those who were born between 1995 and 2009). There are more than 7,000 niche cultural groups available to users on Bilibili, and they can gain new knowledge from rich and in-depth learning resources. This results in a high user retention rate. The youth-oriented video streaming and sharing giant is an important social media platform for brands that target to this demographic group to be on. On Bilibili, it is essential for brands to understand their audiences i.e. young people's thinking and behavior habits, integrate into Bilibili's culture, communicate like friends, and resonate with young people on Bilibili.

In response to the impact of short-form video, Bilibili introduced Story Mode, a vertical video display format that is more suitable for watching short-form videos. The entertainment and immersion of the mode are stronger, satisfying the fragmented content demands of users and increasing the number of advertisement slots and monetization rates. Story Mode has lowered the threshold for content creation, attracted more creators, and activated low-active users. The user age range is wider and has gained the appreciation of middle-aged users. It is expected that Story Mode will solve the commercialization problem of Bilibili and create a content system with complementary advantages of long and short videos.

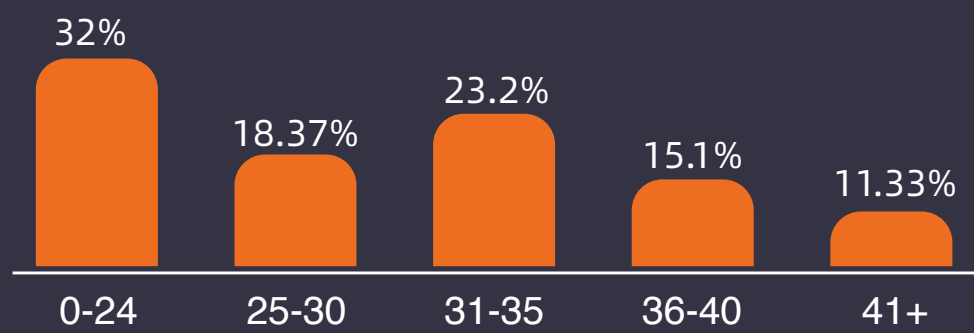




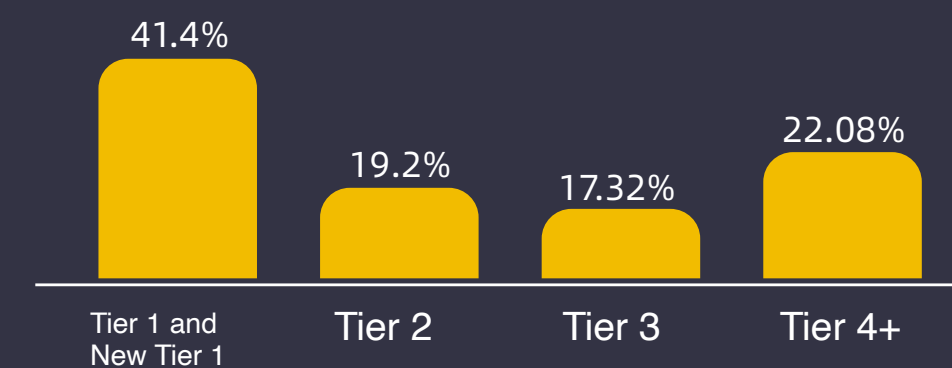
Gender



Age



Geographic Location



## Long-tail Marketing on Zhihu

Thanks to the friendly knowledge-seeking community atmosphere created by its well-educated target audience and the platform's strict control over content quality, Zhihu users still maintain the habit of reading long and in-depth content in an era where attention is highly fragmented. As a knowledge-sharing community, Zhihu's paying members are growing rapidly, and 70% of them have a bachelor's or higher degree. The educated users with strong spending power are willing to pay for high-quality content.

Unlike time-sensitive posts on many social media platforms, Zhihu content has a long tail effect, because the users look for information via search so that an article published two or three years can still draw much traffic. Zhihu content can also be updated and modified after publication after penalization. Additionally, Zhihu content can appear on search engine results page of Baidu and other search engines, which helps develop a virtuous circle for popular high-quality content to get seen more. Generally speaking, the higher page authority, the better ranking, and the easier it is for more users to find, read and "like" the content (the number of likes is a key indicator for Zhihu's content performance).

Due to these advantages and features, Zhihu is especially suitable for brands with a long buying cycle, high average transaction value, or those needing to educate the market. To remain relevant in the minds of users, brands should produce high-quality content, establish thought leadership and leverage the "long tail effect" on Zhihu.



# 03

## References

---

## References

1. 中国互联网络信息中心(CNNIC), 《第43/45/47/49/50次中国互联网络发展状况统计报告》
2. Statista, Number of social media users in China from 2018 to 2022 with a forecast until 2027 (2018-2027年中国社交媒体用户人数)
3. QuestMobile, 《2022银发经济洞察报告》, data as of August 2022
4. 知乎, Zhihu Inc. Reports Unaudited Fourth Quarter and Fiscal Year 2022 Financial Results (《知乎发布2022年第四季度及全年未经审计财务业绩》), data as of December 31, 2022
5. 腾讯控股, 《腾讯2021年报》, data as of December 31, 2021
6. 腾讯控股, Tencent Announces 2022 Fourth Quarter and Annual Reports (《腾讯发布2022年第四季度及全年财报》), data as of December 31, 2022
7. 腾讯控股, 2022微信公开课PRO
8. 腾讯控股, 2023微信公开课PRO
9. QuestMobile, 《2021中国移动互联网年度大报告》, data as of December 2021
10. QuestMobile, 《2022中国移动互联网年度大报告》, data as of December 2022
11. 微博, Annual Report 2021 (《微博2021年报》), data as of December 31, 2021
12. 微博, Weibo Reports Fourth Quarter and Fiscal Year 2022 Unaudited Financial Results (《微博发布2022年第四季度及全年未经审计财务业绩》), data as of December 31, 2022
13. 快手, Annual Report 2021 (《快手2021年报》), data as of December 31, 2021
14. 快手, Kuaishou Technology Announces Fourth Quarter and Full Year 2022 Financial Results (《快手科技发布2022年第四季度及全年财务业绩》), data as of December 31, 2022
15. 哔哩哔哩, 2021 Annual Report on Form 20-F (《哔哩哔哩2021年报》), data as of December 31, 2021
16. 哔哩哔哩, Bilibili Inc. Announces Fourth Quarter and Fiscal Year 2022 Financial Results (《哔哩哔哩发布2022年第四季度及全年财务业绩》), data as of December 31, 2022
17. 小红书, 2023小红书WILL商业大会
18. 知乎, Zhihu Inc. Reports Fourth Quarter and Fiscal Year 2021 Unaudited Financial Results (《知乎2021年第四季度及全年财报》), data as of December 31, 2021

04

**About KAWO**

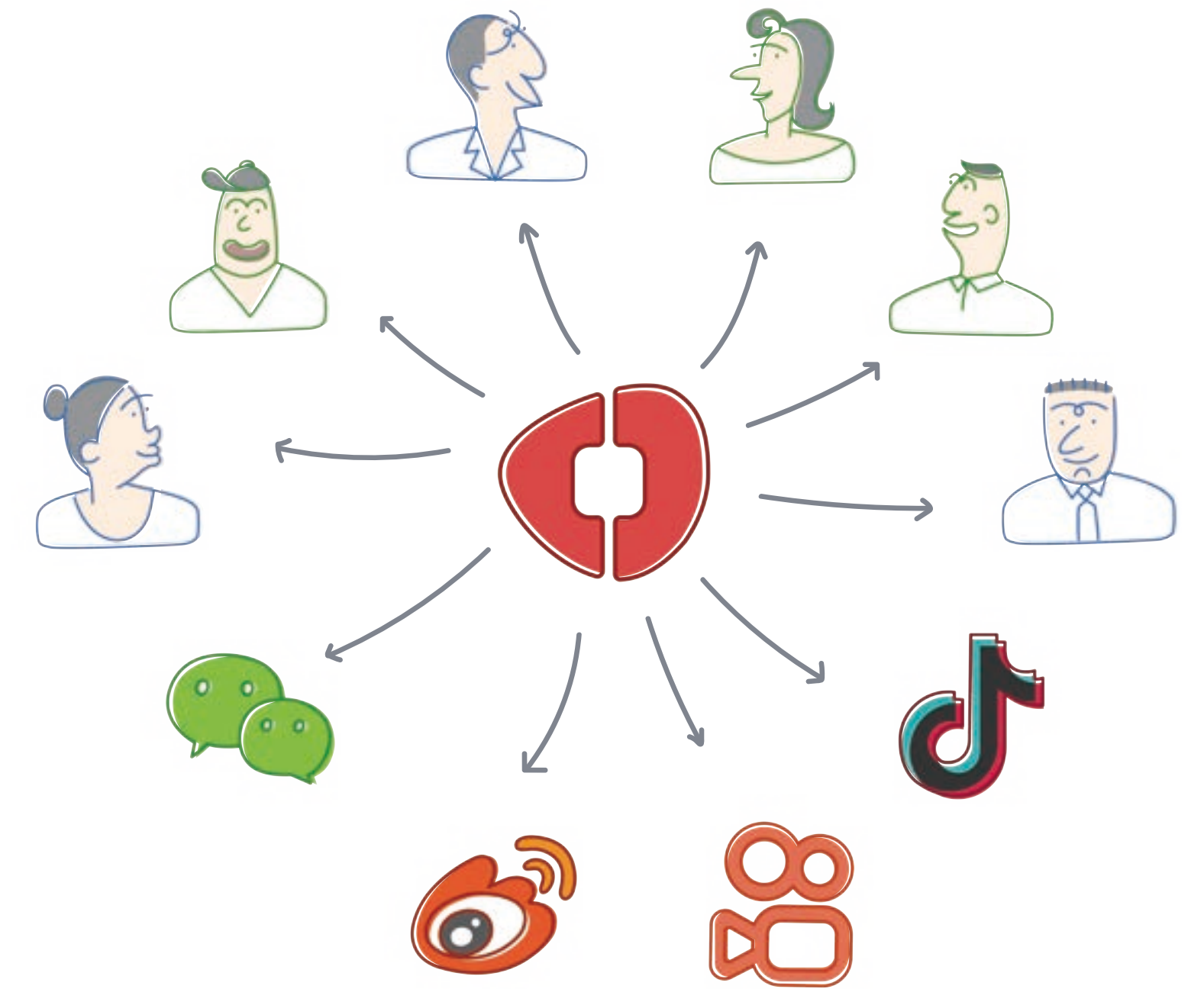
---

# About KAWO

Building a beloved brand is more than having a product to sell. It is about creating relationships with your audience, engaging with them and building trust. At KAWO, we believe there is no other communication channel that lets brands reach, empathize and engage with their customers as intimately as they do via social media.

Founded in 2017, KAWO offers the leading social media management platform in China. KAWO connects teams across the globe providing data insights, greater transparency and increased efficiency.

Our experienced team is focused on delivering high-quality solutions allowing our clients to iterate fast in China's rapidly changing social landscape. We work with more than 500 global brands across a wide range of industries, empowering teams to create better content and gain valuable insights into their China social media performances. With our unparalleled expertise in the local China social media landscape, customer insights and regulations, we are uniquely positioned to support your brand's social success in China.



## Trusted by teams at ...



## Our Investors



Connected With	<b>6</b>	Mainstream Platforms
Served	<b>12+</b>	Industries
Trusted By	<b>500+</b>	Brands
Covered	<b>330M+</b>	Social Followers

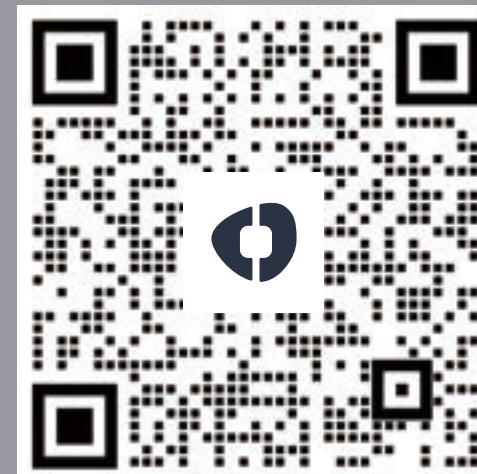
**Great Marketing**

**Doesn't Happen**

**In Chaos!**



Follow KAWO  
on WeChat



Add “WOWO握握” to  
Join the KAWO Community

Website: [www.kawo.com](http://www.kawo.com)

Phone: 86-21-80517616

Email: [hello@kawo.com](mailto:hello@kawo.com)

Address: Room 205, 489 Xiangyang South  
Road, Shanghai, China



Connect with KAWO  
on Social Media