“Consumers may be easily converted when it comes to apps that can provide further convenience, yet they are also hyper-vigilant about the ownership of personal data.”

— Xinyuan Xu, Associate Research Analyst

This report looks at the following areas:

- Mini program boom driven by pursuit of convenience and offline retail
- Fierce competition in search engine services to drive traffic
- Awareness of data protection is on the rise

As China leads the world in developing mature data privacy-related policies, mobile app developers are left to face a more intense market, expected to deliver instant high-quality content, tech-driven innovations, and secure user experiences.
Overview

What you need to know

Covered in this report

Executive Summary

The market

China holds higher market percentage than any other country

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Figure 2: Top countries by app store consumer spend, 2-year growth, 2016-2018

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Four tech giants and one concentrated market

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The consumer

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Overlapping functions and ever increasingly similar usage scenarios

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Young adults have higher demands on app developers

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Figure 10: Popular mobile platforms used for online activities and services, September 2019

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Figure 11: Popular mobile platforms used for online activities and services, September 2019

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Figure 13: TURF analysis of drivers for using mini programs, September 2019

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Figure 16: Attitudes towards removing in-app ads, by age, September 2019
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The implications
Fierce competition in search engine services to drive traffic
The facts
The implications
Awareness of data protection is on the rise
The facts
The implications

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Tencent ecosystem
Alibaba ecosystem

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Baidu ecosystem
Toutiao (ByteDance) ecosystem
ByteDance to become new "B" in China's BAT

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Appendix – Methodology and Abbreviations

Abbreviations