

# 2018-2019 China Mobile Search Engine Market Research Report

iiMedia Research



**Methods in-depth interview and desk research have been used in this report. Also we used our own user data monitoring system and iiMedia Polaris Analysis System for Internet Products.**

- Carrying out in-depth interview with industry experts and user for knowing the key facts of the industry and getting corresponding data.
- Filtering、comparing the following data with data getting in user survey for getting the scale of the industry.
  - Data and information publicized by the Government
  - Public information of the industry
  - Corporate annual reports and quarterly reports
  - Viewpoint publicized by industry experts
- Analyzing data from our own data base, iiMedia Polaris Analysis System for Internet Products, and iiMedia Strawberry Pie Data Survey and Computing System.
- Big Data Public Opinion Monitoring System: First global system achieve public opinion monitoring and negative opinion monitoring through the whole internet, including negative opinion warning, public opinion monitoring, and information of competitive products. Scanning the internet and updating the data every minute.
- Always searching for excellent enterprises as cases, e-mailing for more details : [research@iimedia.cn](mailto:research@iimedia.cn).



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## Overview of China Mobile Search Industry from 2018 to 2019

# Classification of Mobile Search

Mobile Search refers to the search of the general Internet on mobile terminals, so as to achieve high-speed and accurate access to information resources. Currently, mobile search is mainly applied in the fields of browser searching, search engine searching, and general functional searching.

## Browser

Web Server and APP Interactive Software



## Search Engine

Information Retrieval and Result Presentation System



## General Functional Search

### Additional In-Station Search

#### Function on APPs

Searching for the in-station resources through the search function of the APP



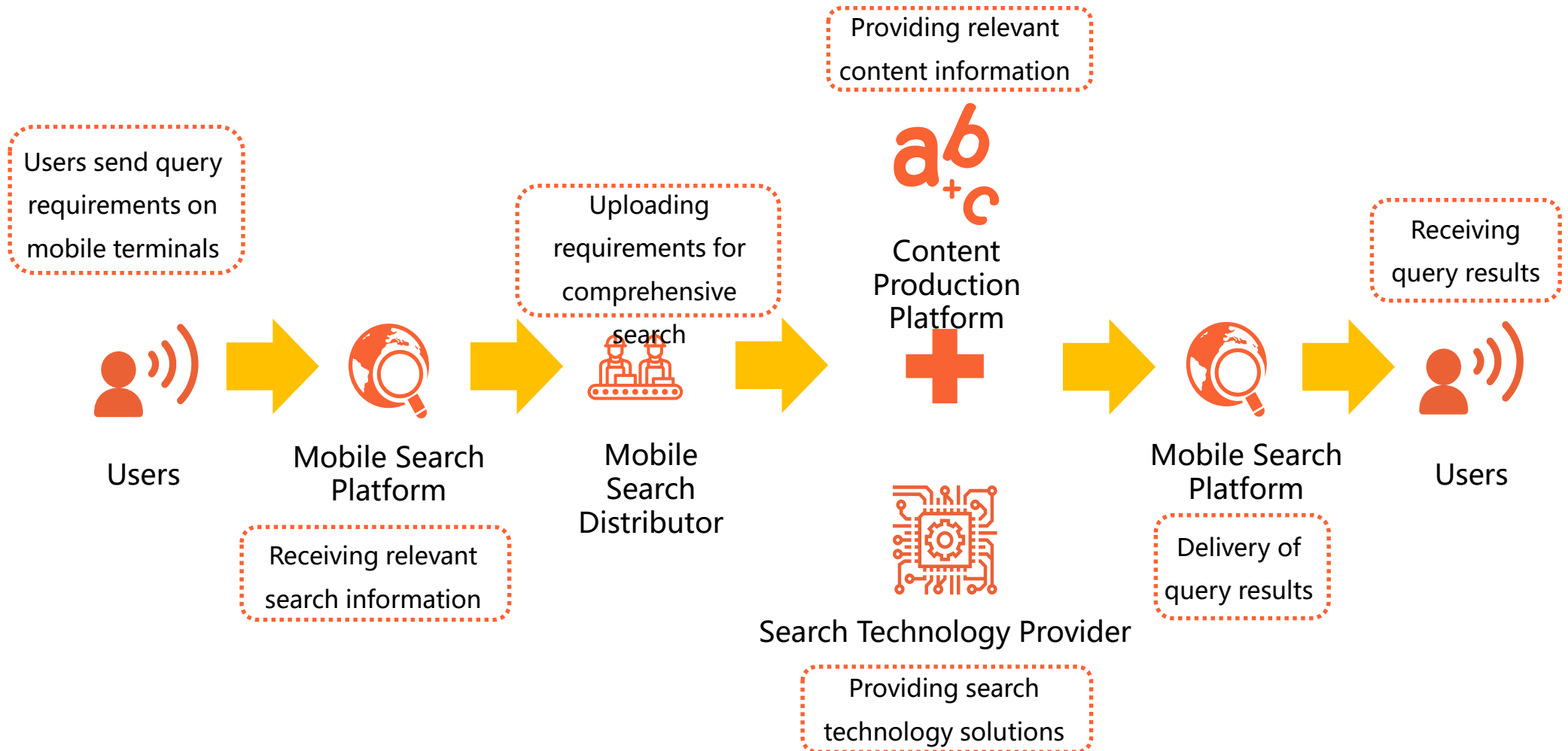
### Additional Off-Station Search

#### Function on APPs

In addition to the search of in-station resources, there are also entries for off-station resources



# Basic Workflow of Mobile Search

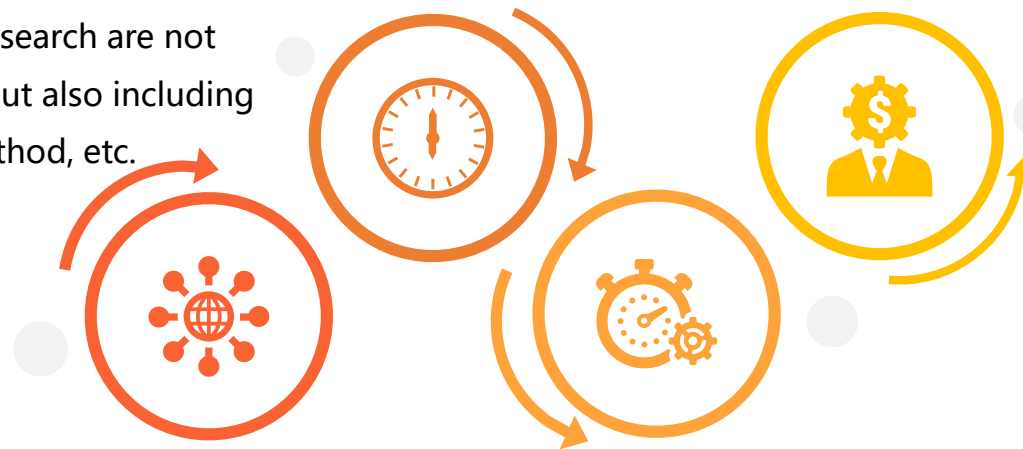


Source: Independent Research and Drawing by iiMedia Research Institute

# Characteristics of Mobile Search

## Diversification of Search Entries

With the rapid development of mobile devices and the improvement of software functions, entries for mobile search are not only restricted in browsers, but also including Wechat search bar, input method, etc.



## Facilitation of Search Behaviors

Mobile search technology allows users to search in more flexible and rich scenarios without time and place constraints. Compared with PC search, mobile search has higher freedom.

## Diverfication of Input Modes

One of the differences between mobile and PC search is that there are more input methods in mobile search, mainly including text search, voice search, image search, two-dimensional search, direct click navigation content, etc.

## Enrichment of User Needs

With the development of the diversity of people's lives, users' demands for mobile information is no longer limited to news and information. Medical care, cosmetology and skin care, tourism information, facial packs and so on have become new needs for users.

# 2018 China Mobile Search Engine Market Dynamics

## 1. Baidu Search Rolled Out Smart Mini Program, Redefining Search Field

On July 4, 2018, Baidu Search has officially launched its smart mini program. On September 25, Baidu announced that mini program is now accepting application. Mini program for Baidu search brings infinite imagination space with dynamic creativity node, the user becomes the node's interactive participant. With the mini program plus information flow, the value of search box become more three-dimensional, vertical deepening, and one-stop. Leveraging the traffic of Baidu Search APP, mini program connect the users accurately, with the aid of Baidu AI services.

## 2. The Accuracy of Direct Answer on the Top of the Search Results by Sogou Search is 94%

The third quarter financial report released by Sogou showed that up to September 30, Sogou has earned over RMB 1.88 billion, achieving a 10% YoY increase. Sogou continues to upgrade its search service by using self-developed Q&A technology, which significantly improves users' satisfaction with the first answer. The coverage and accuracy of the direct answer on the top of the search results of Sogou Search has reached 38% and 94% respectively. By optimizing the product presence, such as providing more photos and videos illustrations, and covering the authoritative vertical content such as healthcare on a larger scale, Sogou Search has promoted the percentage of users' clicks on the first answer in the results of the whole network to 32% from 25% in the last quarter.



## 3. 360 Search Develop "Tuke", Blockchain Technology Escorting Content Creation

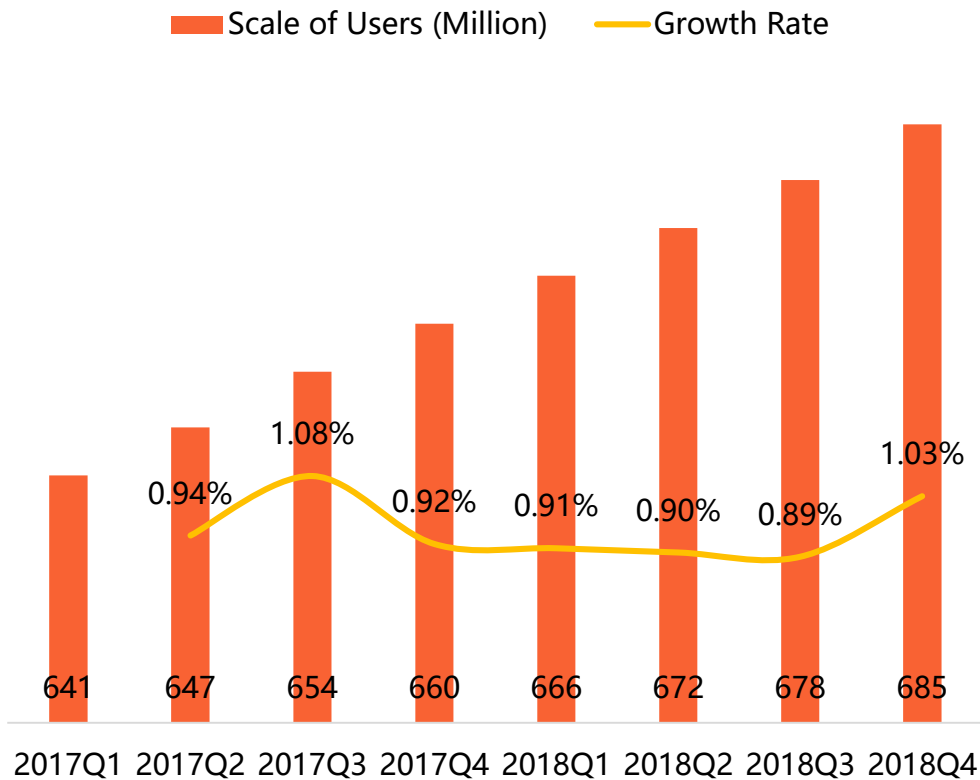
On July 30, 2018, 360 search launched original picture authentication platform "Tuke", signaling the first foray into the blockchain field. Relying on the strong blockchain technical capabilities and brand reputation of 360, "Tuke" provides block chain copyright certification, flow capacity, the entire network of copyright protection for massive content creators. In addition, it connects with ten major product systems of 360, to help original authors get flow share income, thus realizing the "win-win" coporation between search engine flow and content creation and fueling the spread of original content creation.

## 4. Sogou Search Launched "Authoritative Interpretation of Three Armour Doctors"

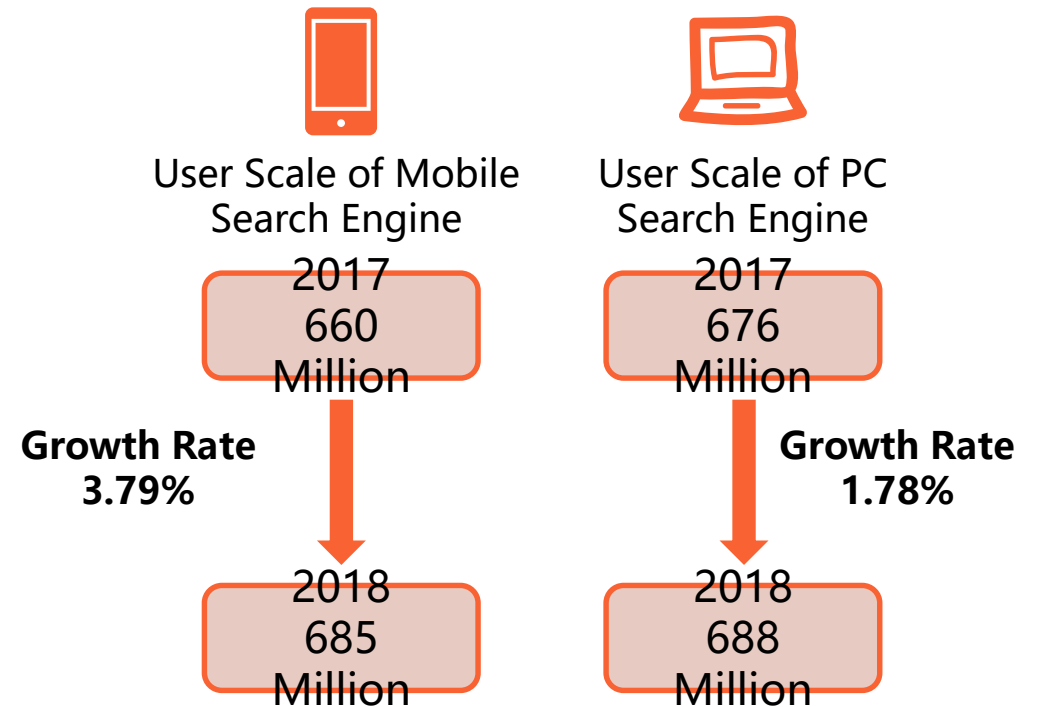
In December 2018, Sogou Search launched the function of "Authoritative Interpretation of Three Armour Doctors" . Based on the function, users can directly obtain authoritative and professional interpretation provided by well-known experts nationwide, as long as they search for keywords related to diseases and symptoms through Sogou Search. The results can be presented in various forms such as audio, video, articles, Q&A.

# User Scale of China Mobile Search Engine is Reaching 690 Million in 2018

## Scale of Users and Growth Rate of China Mobile Search Engine Users from 2017 to 2018



## Comparison of the User Scale and Growth Rate between China Mobile Search Engine Users and PC Search Engine Users from 2017 to 2018



Data Source: iiMedia Research

# Public Opinion Index of Mobile Search Industry

## Yanzhi of “Mobile Search”



## Geographical Distribution of Internet Heat of “Mobile Search”



Beijing	14.10%
Guangdong	11.11%
Hebei	9.83%
Shandong	8.12%
Jiangsu	6.84%

Yanzhi: Reflecting the real-time attitudes of netizens towards an event, a personage, or a brand;

Numerical range from 0 to100;

The more positive attitudes are, the higher Yanzhi when it's over 50; it's usually below 45 when the attitudes grow negative.

Monitoring Period: 2018.12.17—2018.1.14

Data Source: iiMedia Big Data Public Opinion Monitoring System

# Strategic Development Trend of Mainstream China Mobile Search Platform



As the leading China search engine, Baidu Search has a comprehensive layout of AI. Baidu announced its “ACE Project” for AI city in the Baidu World Congress 2018 and would focus on the Intelligent Driving. Also, Baidu would cover national industries of agriculture, manufacturing, and medical. The Senior Vice President of Baidu, President of Baidu Search said that searching is Baidu’s most important AI product, and Baidu would embrace the video era in the future.



The core strategy of Sogou in 2018 is the AI strategy with language as the core. Sogou has launched Sogou Travel Translator and Sogou Translation Pen, which are its first products of AI strategy application. Meanwhile, new application scenarios are actively explored and differential development in vertical fields such as medical, translation, law is focused on.



360 Search focus on being intelligent, safe, and reliable. In 2018, 360 Search satisfies users’ needs by accessing non-legacy databases, launching online manual translation, and cooperating with administrative and judicial units to expose illegal business. In the future, 360 would continue to cultivate AI innovation, focus on the product application of AI technology, and would expand the application space in the field of image and text recognition.

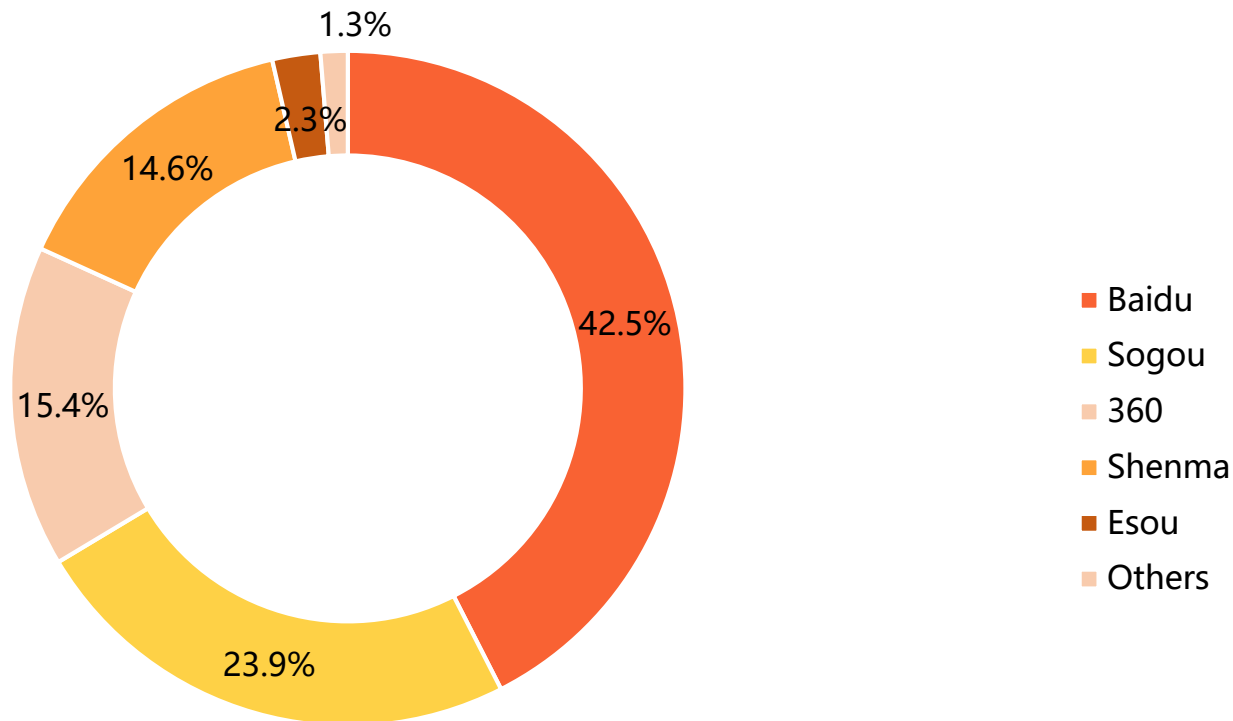


Currently, Shenma Search relies on Alibaba Group’s big data platform to get through the multi-dimensional and thorough-scenario data end, which includes Taobao, Tmall, Xiami, Amap, Tudou, Shuqi, taopiaopiao, etc., which intelligently and accurately meets users’ search needs. In the future, the focus of Shenma Search would be user understanding, technological innovation, and

# Baidu and Sogou Remain Top 2 Most Preferred Search Engine in China

As the data of iiMedia Research showed, in the fourth quarter of 2018, Baidu topped the list of users' most preferred brands in Chinese mobile search engine industry(42.5%), followed by Sogou(23.9%).

## Share of Chinese Mobile Search Engine Users' Preferred Brands in 2018Q4



Data Source: iiMedia Research

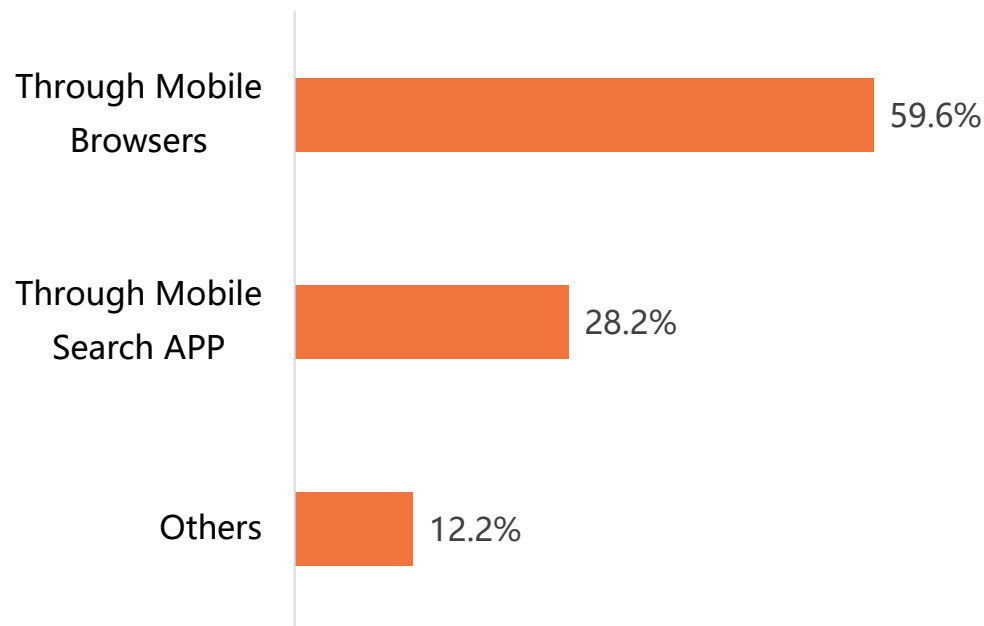
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## Behavior Analysis of China Mobile Search Users from 2018 to 2019

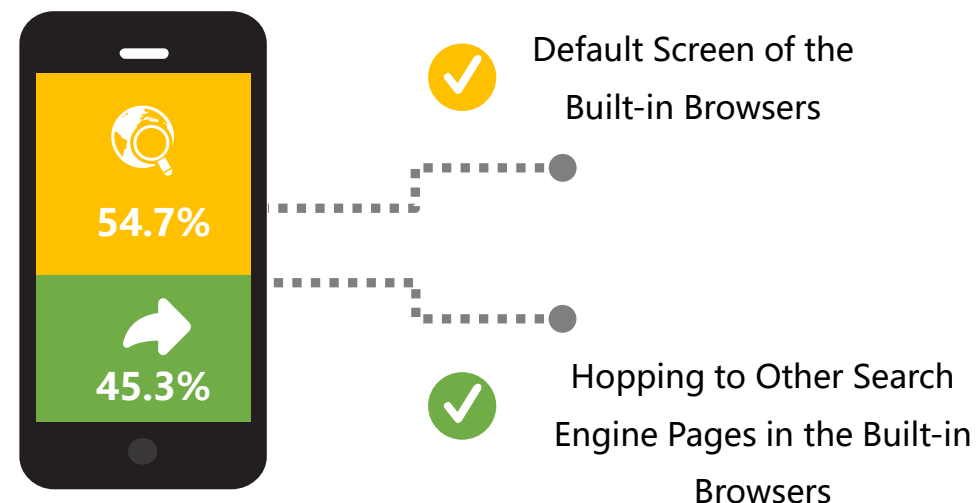
# Browsers are Still the Preferred Search Channel for Most Mobile Search Users

As the data of iiMedia Research showed, 59.6% of the interviewed users preferred to use the built-in browsers when searching for information on mobile terminals, while 28.2% preferred to use the mobile APPs for searching. **iiMedia Research consulting analyst believes that**, users are more inclined to choose less step-requiring, less time-consuming, less website-hopping search channels when searching information on mobile phones or tablets.

## Survey on the Preference to the Search Entries for China Mobile Search Users in 2018



## Survey on the Using Habits of Built-in Browsers for China Mobile Search Users in 2018

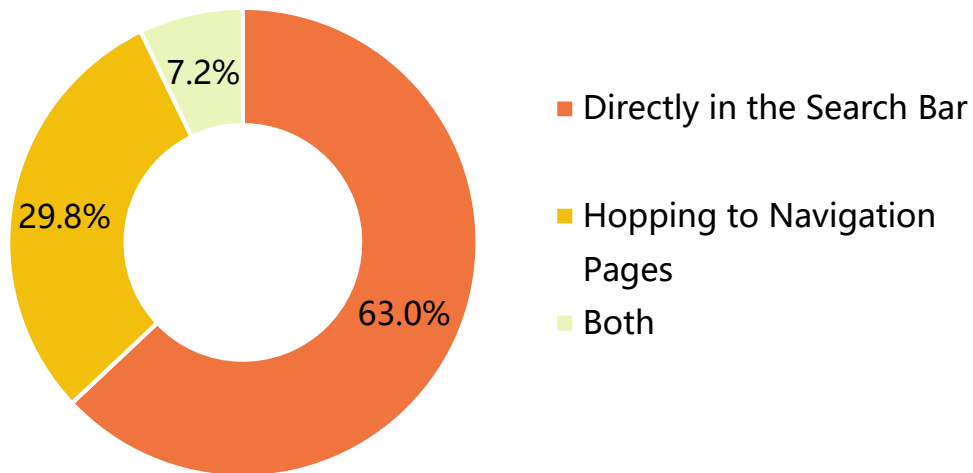


# Over 60% of the Users Prefer Comprehensive Searching on the Mobile Terminals

As the data of iiMedia Research showed, 63.0% of the interviewed users preferred entering relevant information directly in the search bar when searching on the mobile terminals, while only 29.8% would choose the corresponding categories in the navigation bar before querying. **iiMedia Research consulting analyst believes that**, most users haven't formed the habit of screening in the navigation bar when conducting search behavior on the mobile terminals. Accurately matching the types of contents users search will greatly improve the accuracy of search results.

## Survey on the Searching Habits for China

### Mobile Search Users in 2018



Data Source: iiMedia Strawberry Pie Data Survey and Computing System

Sample Size: N=2166; Research Period: 2019.01

## Related Explanation



Search Bar

Navigation Bar



### Directly in the Search Bar

In the comprehensive search pages, the keywords that need to be searched are directly entered into the search bar.



### Hopping to Navigation Pages

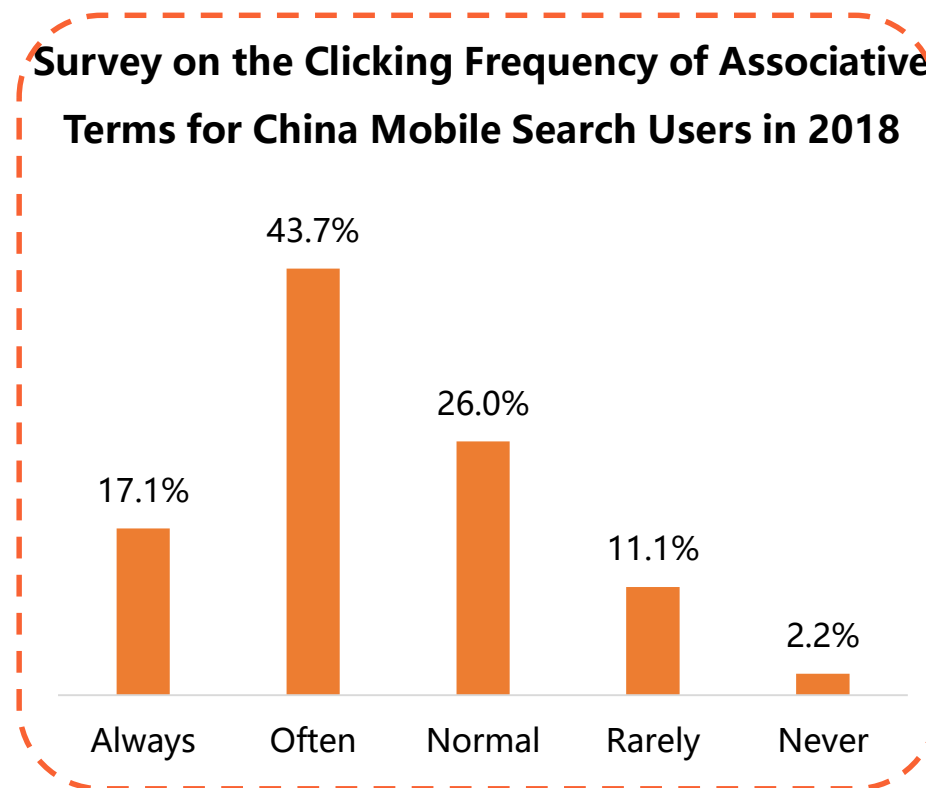
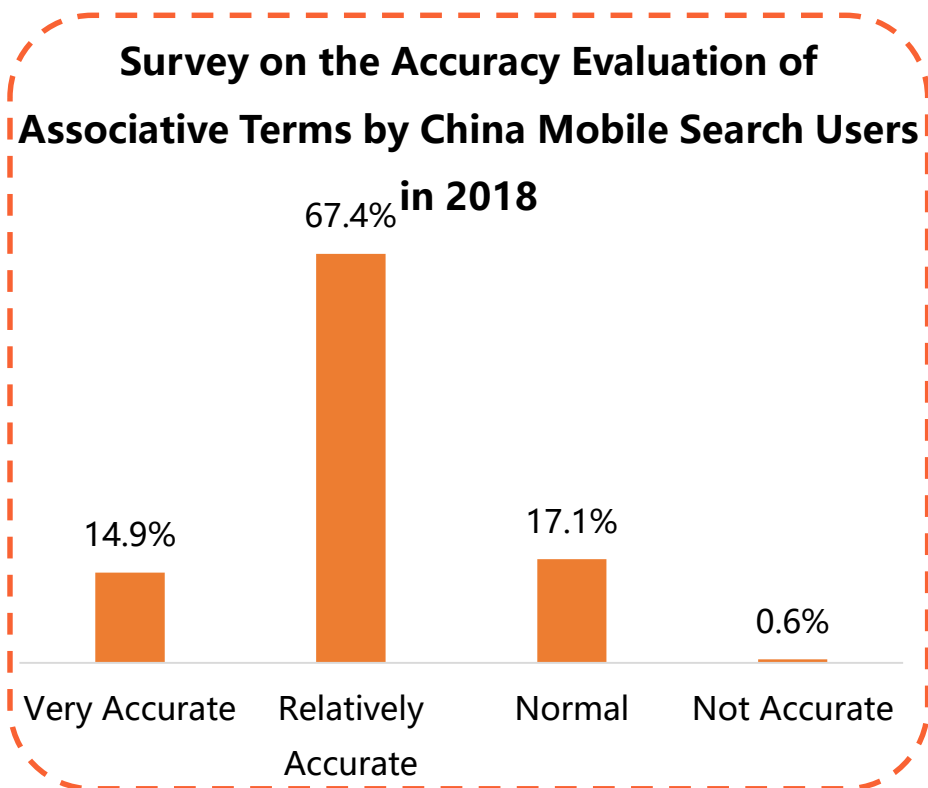
In the comprehensive search pages, users select and hop to navigation pages that match the type of search content.

Data Source: iiMedia Research



# Nearly 70% of the Users Think that Associative Terms for Searching are Relatively Accurate

Mobile search associative terms refer to the ones that automatically appear when users enter part of the keywords in the search bar, and would appear in the form of the expansion of keywords under the search bar. As the data of iiMedia Research showed, 67.4% of the interviewed users thought that the associative terms were relatively accurate, and 43.7% often choose them directly. Meanwhile, 11.1% and 2.2% of the respondents rarely or never clicked on the associatively terms respectively.



Data Source: iiMedia Strawberry Pie Data Survey and Computing System  
Sample Size: N=2166; Research Period: 2019.01

Data Source: iiMedia Research

# Purposeful Search is Still the Primary Reason for Users Using Mobile Search Platforms

As the data of iiMedia Research showed, 59.7% of the interviewed users said that their main purpose of searching was to query for information about something when using mobile phones or tablets, while 50.8% queried about the explanation of a word or sentence. **iiMedia Research consulting analyst believes that**, most users use mobile search function with strong purpose currently. Optimizing the presentation of search results, accurately matching the search needs of users, can greatly enhance the search experience of users, and can improve their loyalty to the mobile search platform.

## Survey on the Purpose of Mobile Search Platforms Used by China Mobile Users in 2018



Data Source: iiMedia Strawberry Pie Data Survey and Computing System

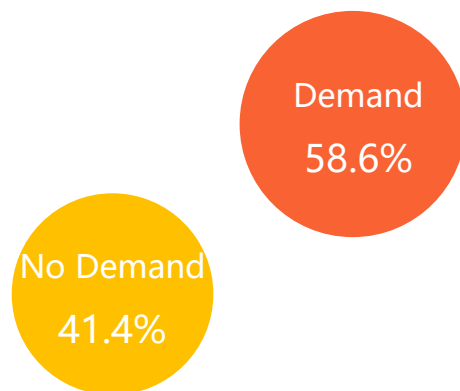
Sample Size: N=2166; Research Period: 2019.01

Data Source: iiMedia Research

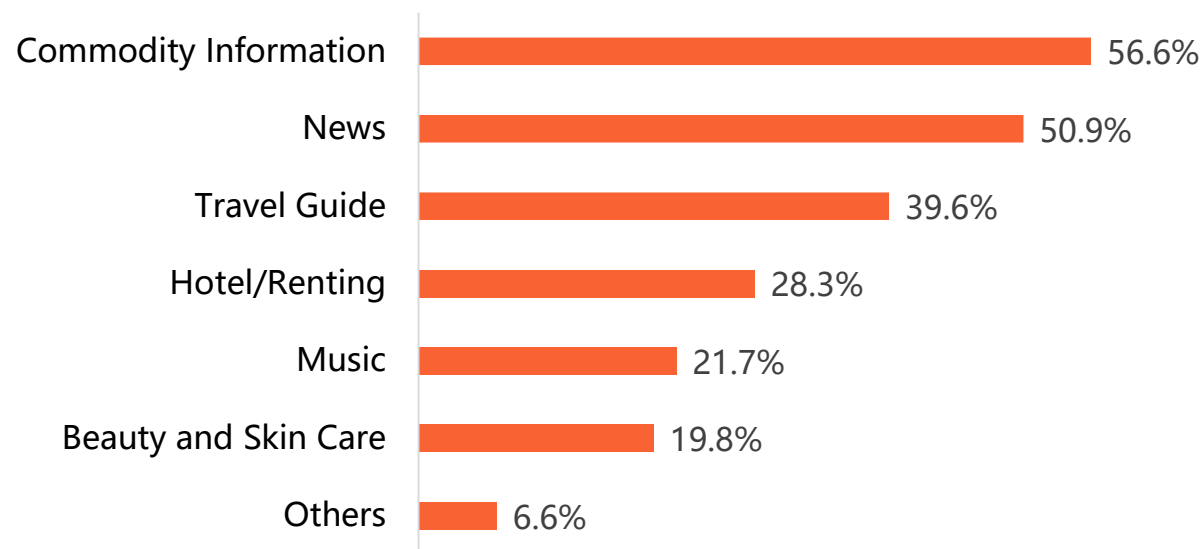
# Cross-Software Search Demand has Great Market Potential

Cross-Software search refers to the users' needs for multiple software-related information searches for the same thing. As the data of iiMedia Research showed, 58.6% of the interviewed users expressed their demands for cross-software search, of which 56.6% had the need for cross-software search in commodity information and 50.9% demanded for news information cross-software search. **iiMedia Research consulting analyst believes that**, the amount of the Internet information is enormous. The procedure for information collecting is time-consuming and its contents are scattered. Cross-Software search can achieve the collection of multiple software information, which belongs to the potential search demand and has huge market potential.

Survey on the Cross-Software Search Demand  
for China Mobile Search Users in 2018



Survey on the Content Requirement of Cross-Software  
Search for China Mobile Search Users in 2018



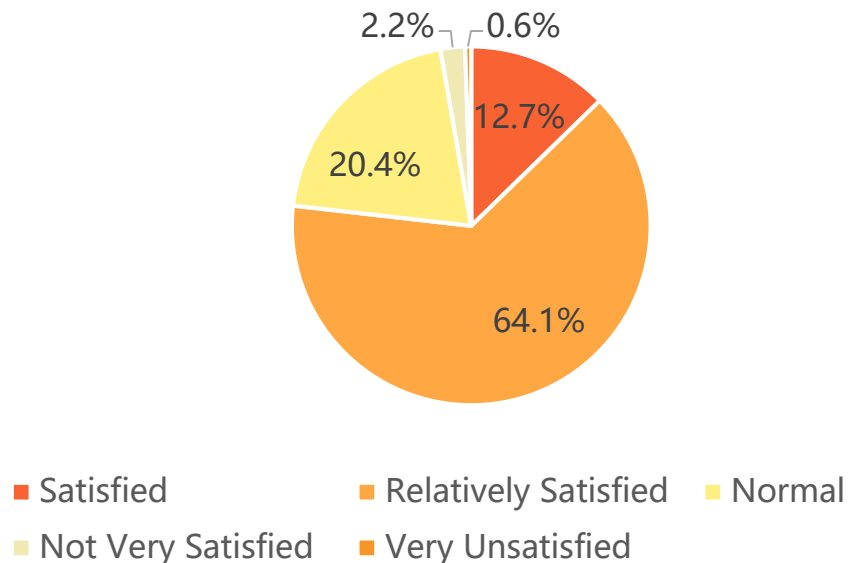
Data Source: iiMedia Strawberry Pie Data Survey and Computing System  
Sample Size: N=2166; Research Period: 2019.01

Data Source: iiMedia Research

# Page Ads and Information Security Become the Most Expected Aspects for Improving

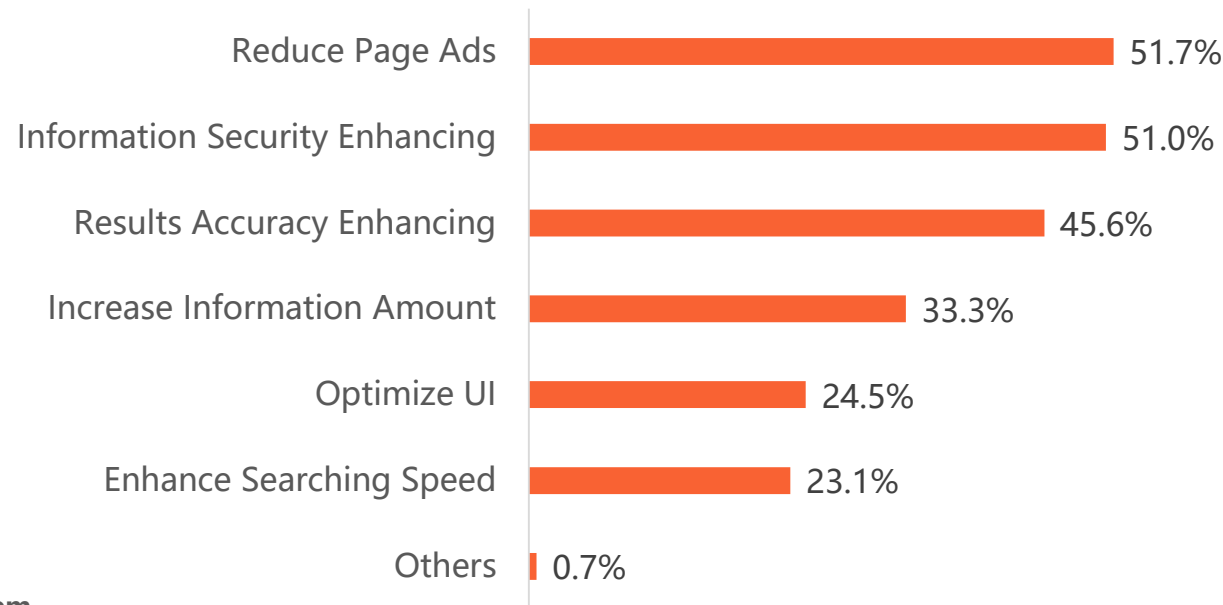
As the data of iiMedia Research showed, 64.1% of the interviewed users were relatively satisfied with the searching experience on mobile terminals. The usage optimization that users mostly expected to improve are page ads reducing and accounting information security enhancing, accounting for 51.7% and 51.0% of the respondents respectively. **iiMedia Research consulting analyst believes that**, it would be helpful for enhancing the publicity effect of ads information and users' good impression of the platform if the search platforms could achieve precise advertising, providing faster searching experience, and intercepting malicious advertising to safeguard users' account information better.

## Survey on Mobile Search Satisfaction of China Mobile Search Users in 2018



Data Source: iiMedia Strawberry Pie Data Survey and Computing System  
Sample Size: N=2166; Research Period: 2019.01

## Survey on the Expected Usage Optimization for China Mobile Search Users in 2018



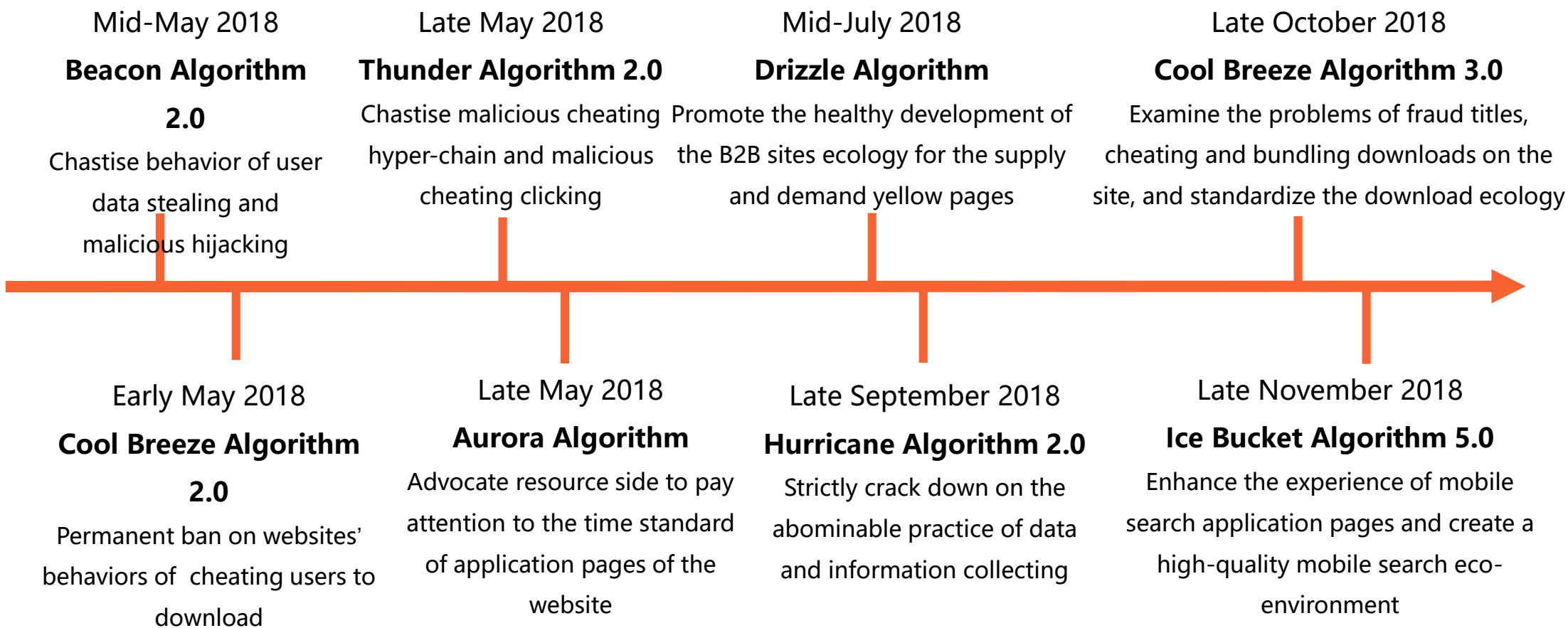
Data Source: iiMedia Research

03

## Case Study of China Mobile Search Industry from 2018 to 2019

# Baidu Upgrades Algorithms, Strengthens Platform Supervisions, and Improves User Experience

In 2018, Baidu Search improved the upgrade speed of algorithm, strengthened the content management of the platform from the technical level, standardized the industry ecology of download websites and supply and demand yellow pages B2B sites. It also chastised the problems of cheating, user data stealing, and malicious collecting. Baidu Search strived to create a high-quality mobile search eco-environment to provide better experience for users.



# Baidu Launched Smart Mini Program

On July 4, 2018, Baidu officially launched its smart mini program. On September 25, applications for Baidu smart mini program are accessible. On December 20, the Baidu Smart Mini Program Open Source Alliance was formally established, and the first members included iQIYI, Kuaishou, Bilibili, etc. In the future, these enterprises will become an important access to the Baidu smart mini program by supporting its operation in their respective APP. "Smart mini program + Information flow" makes the access value for the search bar being more three-dimensional, deepening and one-stop. Leveraging the traffic of Baidu Search APP, mini program connect the users accurately, with the aid of Baidu AI services. At the same time, it brings dynamic creative nodes with imagination space, and users become deep interactive participants of nodes.

## Four Core Advantages of Mini Program

### Open Source

Open Source Alliance helps developers to access global domain traffic

### Self Traffic

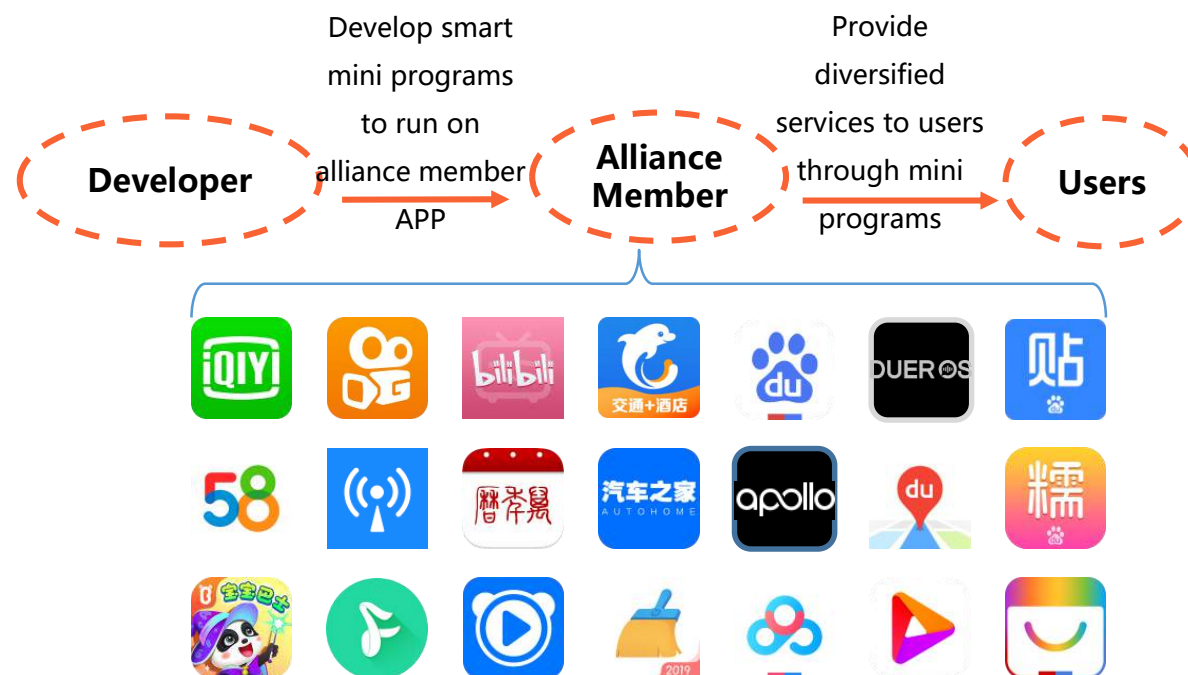
Basing on Baidu's traffic entry to benefit developers

### Intelligent Access

Accessing mini program by its leading intelligent technology to meet new needs

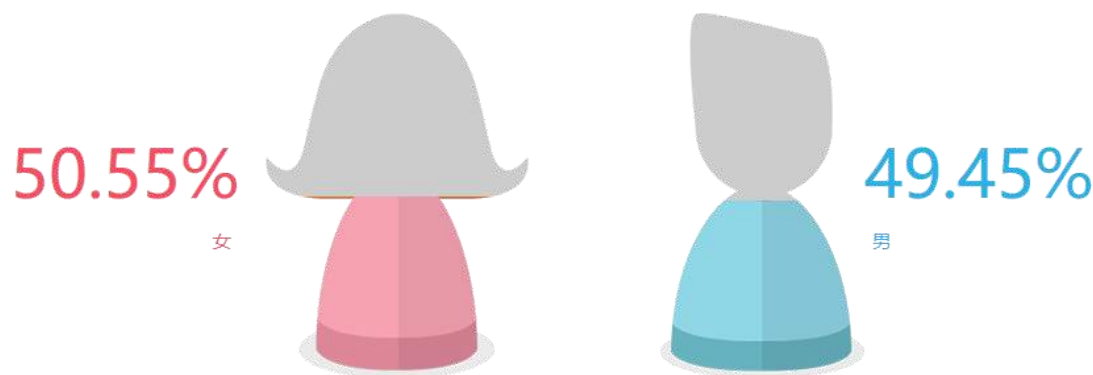
### Fluent Experience

Closed-loop, native-like mini programs provide users with comfortable experience

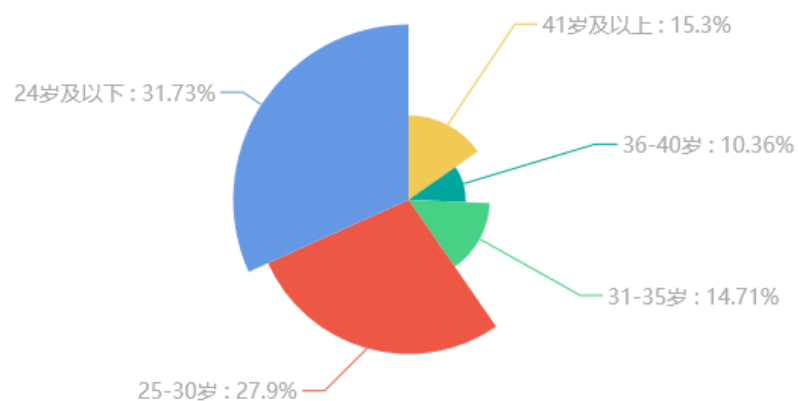


# User Attribute Analysis of Baidu APP

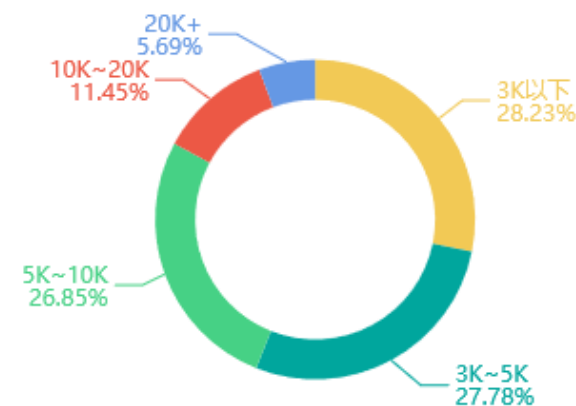
## Distribution of Sex of Baidu APP Users in December 2018



## Distribution of Age



## Distribution of Average Monthly Income



Data Source: iiMedia Polaris Analysis System for Internet Products



# Sogou Search Deeply Cultivate on Medical Search and Help Improve the Whole Nation Health

Since 2018, Sogou Search has launched a series of medical functions, such as overseas health information authoritative search, three armour doctors' authoritative interpretation, medical guidance. It covers medical information from health science to practice guidance, and opens a new era of China health search. Sogou Medical Search the threshold for users to access authoritative medical information from experts and improves the convenience. As the result, the amount of medical search queries in Sogou mobile search has increased by 32% compared with last year.

## Overseas Health Information Authoritative Search

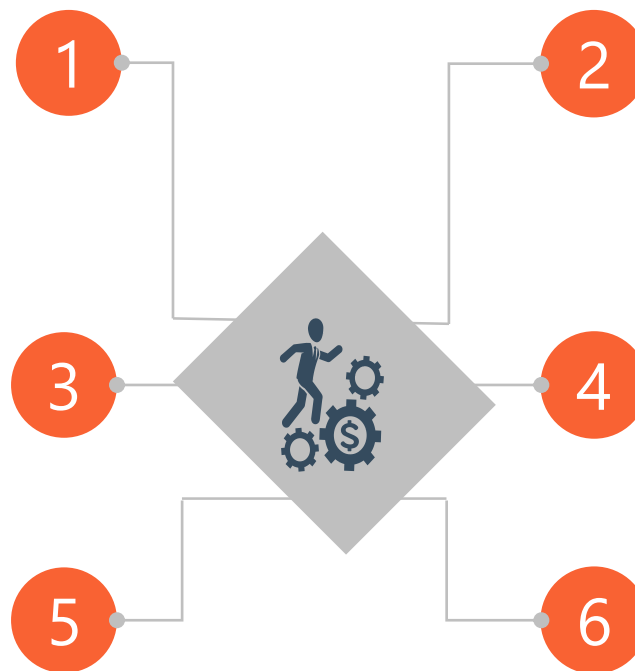
Employing authoritative overseas medical content, including high-quality content from Mayo Clinic, NIH, WebMD, etc.

## Drug Safety Access Inquiry

Quick inquire about the batches of problematic drugs published by NMPA up to 2018, and update the information of NMPA synchronously.

## Sunflower Kid's Anti-Cancer Public Welfare Information Zone

Include the encyclopedia knowledge of 13 kinds of kids' cancer disease and the essence of lectures by global clinical experts. The channels for volunteer recruitment in the zone are open synchronously to facilitate users to know or join the welfare activities of kids' anti-cancer at the



## Guide to Medical Advice Seeking

Exclusively authorized by the NATCM. It provides medical guidance for users basing on different symptoms in different scenarios, helping them seek medical treatment or first aid promptly.

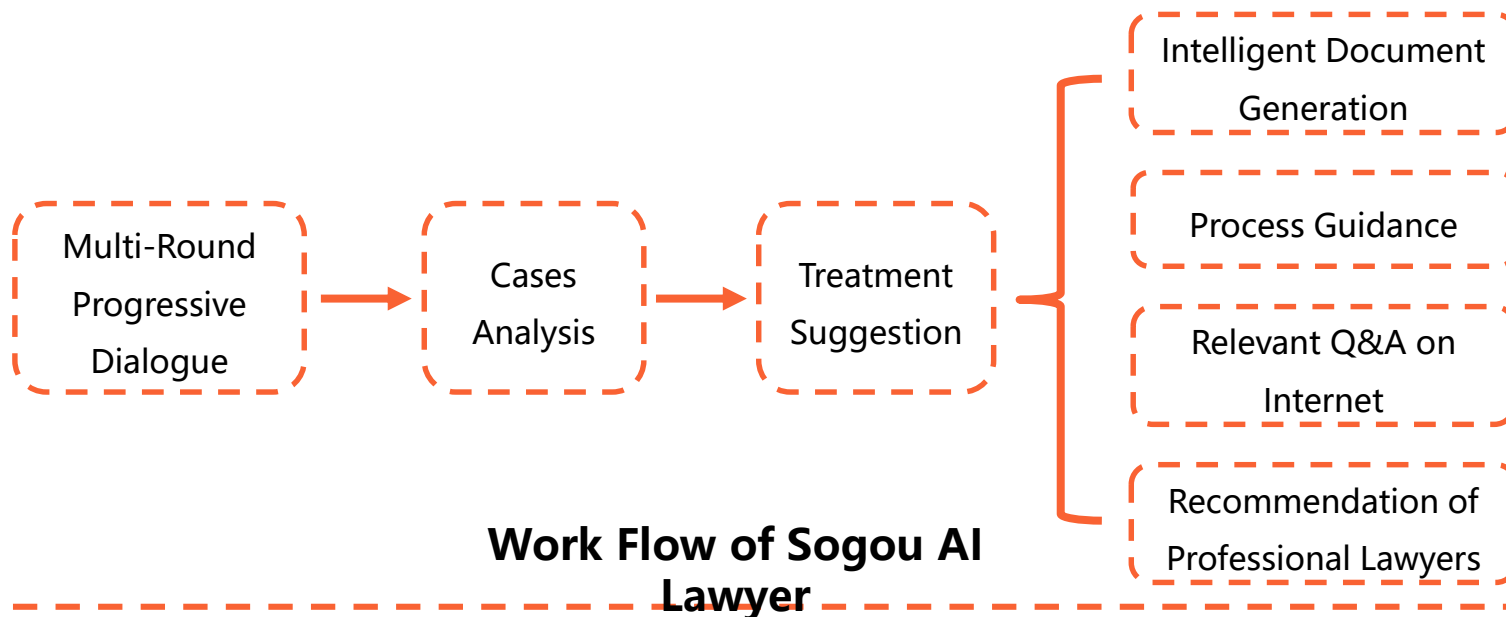
## Authoritative Encyclopedia of Pharmaceutical Instructions

Provide drug information such as outline of drug function, instruction for use and precautions. It's complied by the expert group of CMDD and updated synchronously with the data of NMPA

## Three Armour Doctors' Authoritative Interpretation

Fully covering queries of all diseases and symptoms related. It provides users with authoritative and professional interpretation from three armour doctors for each of their

# Sogou Launched “AI Legal Consultation” to Lower the Threshold of Professional Services



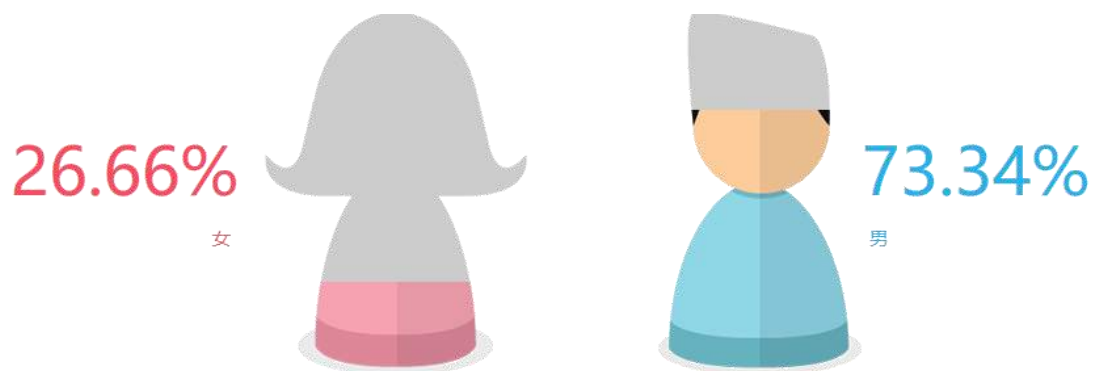
## Sogou AI Legal Consultation Page



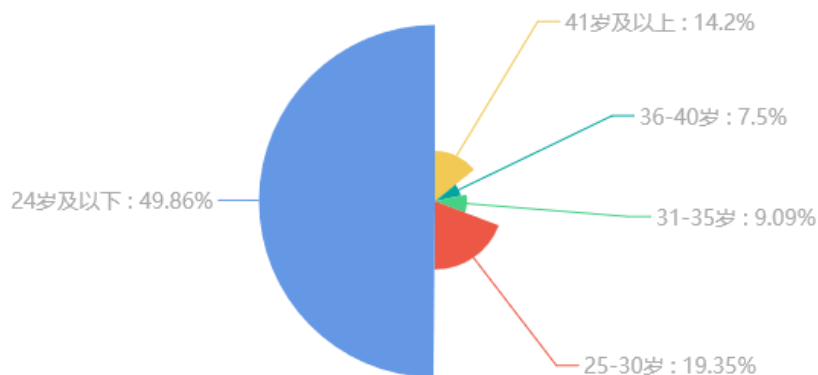
Sogou Lawyer, a professional legal Q&A platform of Sogou Search, has launched a new function of “AI Legal Consultation”. It can imitate the multi-round dialogue between lawyers and clients through AI intelligent Q&A system, and provide free, practical, multi-field legal consultation services for users in real time, so as to promote the process of law popularization. **iiMedia Research consulting analyst believes that**, search services in vertical fields has greater development space in the future. For example, Sogou Search focused on the application of medical and legal related search services, which will effectively address user-oriented search needs. At the higher level of AI, AI-enabled human-computer intelligent interaction is different, and the search engines begin to differentiate. AI reserve resources of different companies are different currently, but the level and the application of AI technology in search scenarios will be the key to the competition in mobile search industry in the future.

# User Attribute Analysis of Sogou Search APP

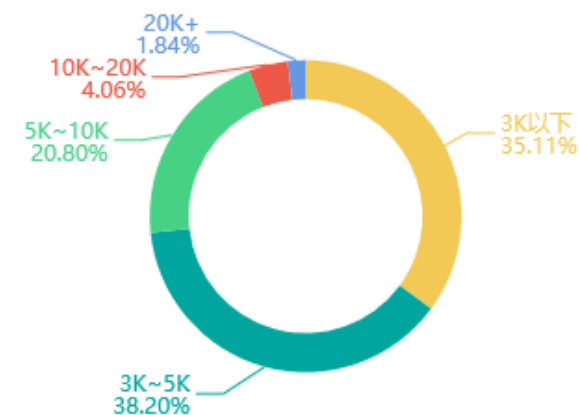
Distribution of Sex of Sogou Search APP Users in December  
2018



Distribution of Age



Distribution of Average Monthly Income



Data Source: iiMedia Polaris Analysis System for Internet Products

# 360 Search Developed "Tuke" and Create Quality Content Ecology through Its Three Core Functions



On July 30, 2018, 360 search launched original picture authentication platform "Tuke", signaling the first foray into the blockchain field. "Tuke" provides block chain copyright certification, flow capacity, the entire network of copyright protection for massive content creators. In addition, it connects with ten major product systems of 360, to help original authors get flow share income and protect the original content. **iiMedia Research consulting analyst believes that**, the search experience of users would be more inclined to quality content platform in the future. Copyright protection for the originators would in fact absorb a group of authors who focus on original content production, which is conducive to the platform remaining users with appreciation and consumption power, laying the foundation for 360 ecology innovation and prosperity.



## Block Chain Copyright Authentication

Provide free and speedy registration service for the original. Based on the block chain, digital signature and trusted timestamp tripe technology authentication, the platform generates undistorted "Tuke" DNA for each original picture, and realize cross-platform original traceability.



## Brand, Flow and Benefit

The ten major product systems of 360 focus on picture distribution. It brings flow introduction and brand exposure to the creators. By connecting the content demanders, expanding content distribution channels, it accelerates the dissemination and trading of the content and realizes the standard circulation of copyright.

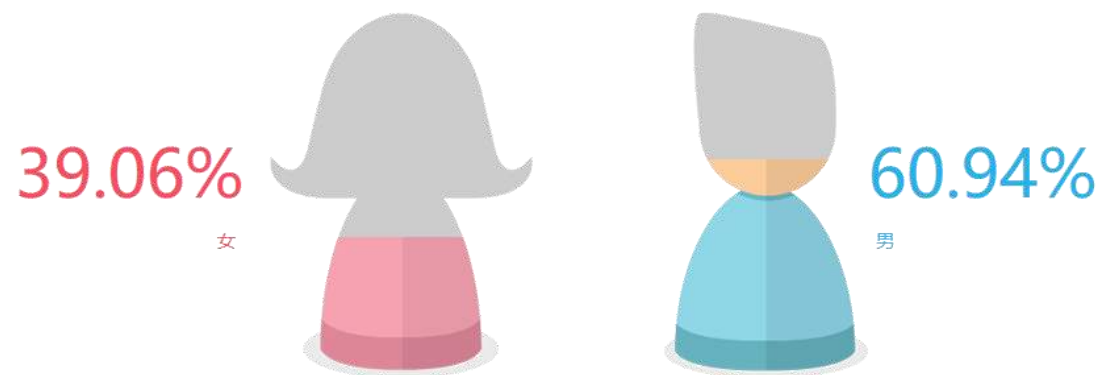


## Network-Wide Copyright Monitoring

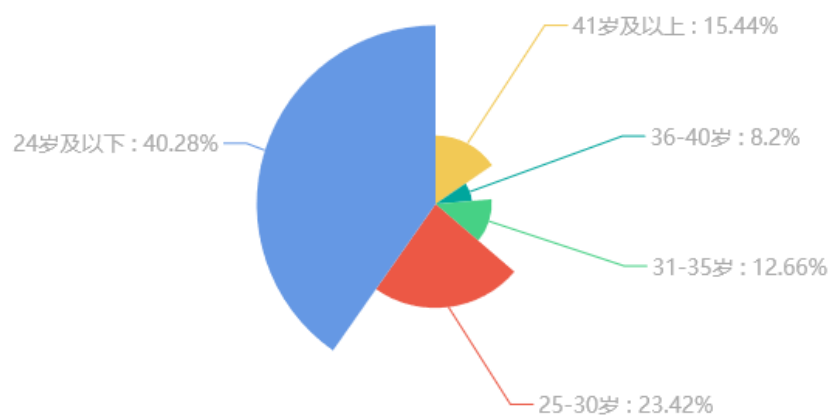
Relying on the 360 Search and digital watermarking technology, the platform monitors the Internet infringement of the original works, and assists lawyers to formulate targeted rights protection programs. It effectively combat infringement and ensure the benefits of the original authors.

# User Attribute Analysis of 360 Mobile Browser APP

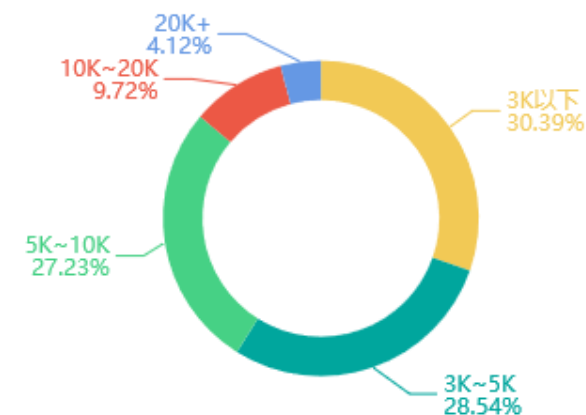
Distribution of Sex of 360 Mobile Browser APP Users in December 2018



Distribution of Age



Distribution of Average Monthly Income



Data Source: iiMedia Polaris Analysis System for Internet Products

## 04

## The Tendency of China Mobile Search Engine Industry

# Tendency of China Mobile Search Engine Industry



The overall development of the industry is good, and there is still room for great growth

iiMedia Research consulting analyst believes that, the trend of the overall development of the industry is good, despite of the negative news that frequently appeared in the past. Search advertising promotion is effect-oriented. It on the one hand achieves attraction of the online users, and on the other hand, shapes the brand image through publicity and promotion. With the improvement of the quality of public life, the coverage rate of the mobile phones will become larger, and there is still large room for the promotion of mobile search advertising.



## Diversified and lean development of information flow advertising

At present, the major forms of mobile search advertisement are open-screen advertisement, information flow advertisement and search advertisement. Among them, the implantation mode of the information flow advertisement is more moderate, more acceptable to users and better able to meet advertisers' propaganda needs in content. iiMedia Research consulting analyst believes that, the information flow advertisement would still be the most popular form of advertising in the coming period, and would develop towards a more diversified and refined direction. On the one hand, it will be more diversified in the presentation of advertising and material style, on the other hand, it will be more refined in directional push based on the data management system.



# Tendency of China Mobile Search Engine Industry



## Taking technology as the core and achieve differential development

Mobile search has a higher dependence and cohesion on users. Because of the particularity of the usage scenarios and the limitation of mobile terminals, users' mobile searching experience is more sensitive and their focus on content is higher. **iiMedia Research consulting analyst believes that**, the key of the industry development in the future is still technology, including the presentation of search contents, algorithm optimization, database maintenance and so on. At the same time, the trend of differential development in the industry will be more obvious.



## Develop along in the mobile and PC search

Users have different usage habits on the two terminals, but mobile search and PC search complement each other in their usage scenarios, functions and characteristics. **iiMedia Research consulting analyst believes that**, strengthening the interaction design between mobile and PC search pages can provide users with a better use experience, which is conducive to their mutual development.



### POIIMedia(艾媒舆情)

#### 大数据舆情监控系统

(yq.iimedia.cn)

通过先进的文本分析挖掘技术，全面满足客户各类需求，危机预警追踪。

### DatallMedia(艾媒北极星)

#### 移动应用运营监测

(bjx.iimedia.cn)

科学统计分析流量来源，透视用户活跃留存流失，提升推广效率降低成本。

### SurveyiiMedia(草莓派)

#### 用户感知与体验监测

(survey.iimedia.cn)

增加精准用户画像维度，了解用户主观消费意愿，获取用户客观服务评价。

### SoicaliiMedia

#### 微信微博媒体监测

(SocialiiMedia)

及时发现机器造假刷量，评估公众号的传播实力，识别受众兴趣与偏向。

### RankingsiiMedia(艾媒金榜)

#### 权威消费品牌评价监测

(ranking.iimedia.cn)

独有的iiMedia大数据评价模型，结合多个维度实现品牌价值评价与排名；提供中立、客观的品牌信息及购物消费指南。

### ADiimedia

#### 移动广告效果监测

(www.adiimedia.com)

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## —— 艾媒咨询大数据监测体系 ——

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