



# WECHAT MINI-PROGRAM REPORT

## 微信小程序报告

APRIL 2018



# Snapshot

## mini program:

- applications smaller than 10 megabytes can run instantly on WeChat's interface
- application can be used without downloading and installing
- users can scan or search for mini applications and use it right away

over

**1 billion**

monthly active  
WeChat users

Use cases include:

Lifestyle

Ecommerce

Retail

Games

Government Services

**580k**

mini programs

**1 million**

third party  
developers

**170,000,000**

daily active mini program users

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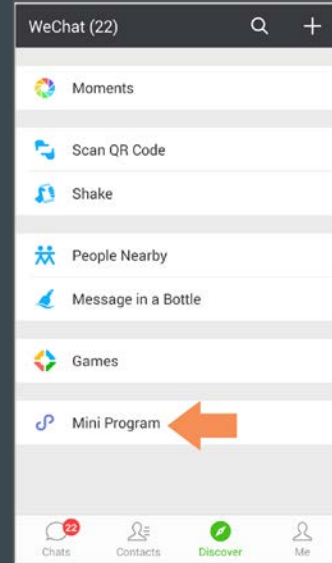
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# What are WeChat mini-programs ?

Mini-programs are instant geo-based apps within the WeChat app that can run without the need to download.

Tencent has re-engineered the WeChat messaging app in a way that applications smaller than 10 megabytes can run instantly on WeChat's interface.

These mini-programs are “sub-applications” within the WeChat ecosystem and its features span from e-commerce and task management to payments among many others.



# Definition of mini apps

Official definition: mini-applications are applications that can be used without downloading and installing. Users can scan or search for mini applications and use them straight away

## Tool

- Enable low frequency applications
- Connected to public accounts
- Enable connection to digital hardware via QR code

## Platform

- Based on social and PaaS (Platform as a service)
- Government service platform

## Ecosystem

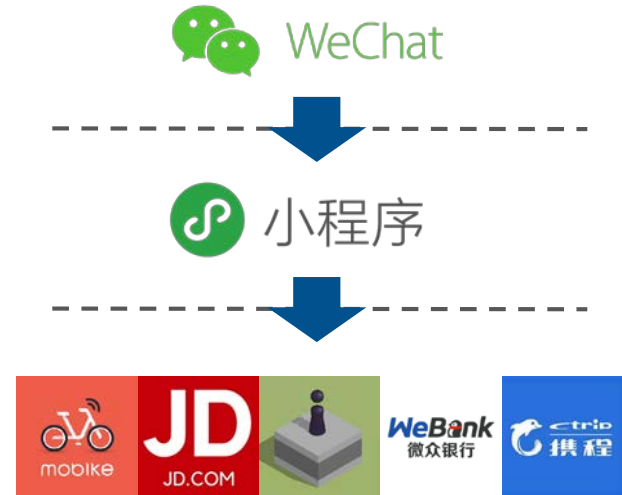
- New retail ecosystem
- Location based O2O ecosystem
- Office suite for a variety of operating systems i.e. similar to Microsoft Office

# Apps vs Mini Programs

Apple and Alphabet have used their own native app stores (App Store and Play) to allow users to access the app universe on their own respective operating systems (iOS and Android)

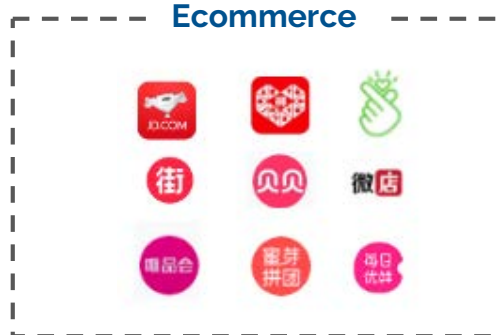
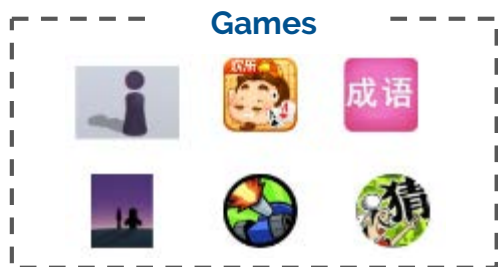


Tencent, through its mini mobile applications (less than 10MB in size), allow users to bypass traditional app stores and run programs directly within its WeChat application



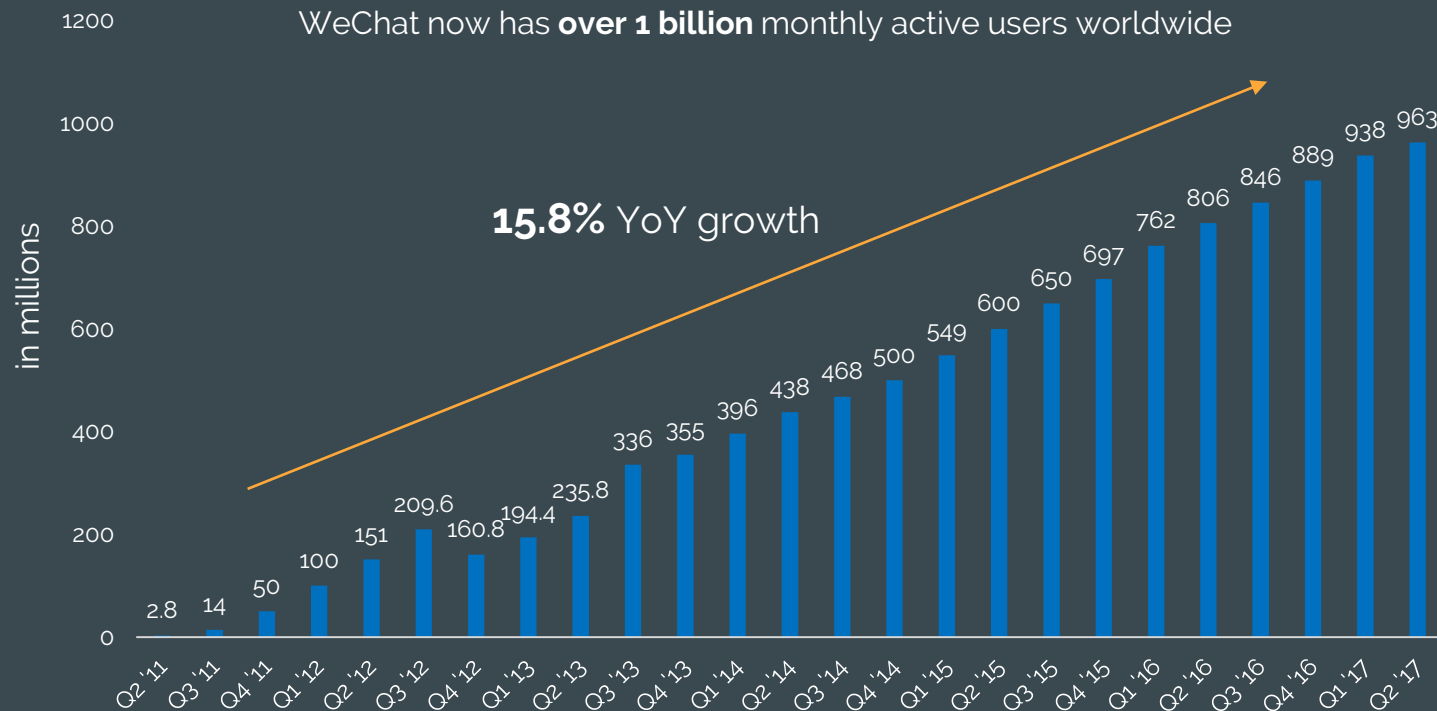
# Market Size and Ecosystem

# WeChat Mini Program Ecosystem



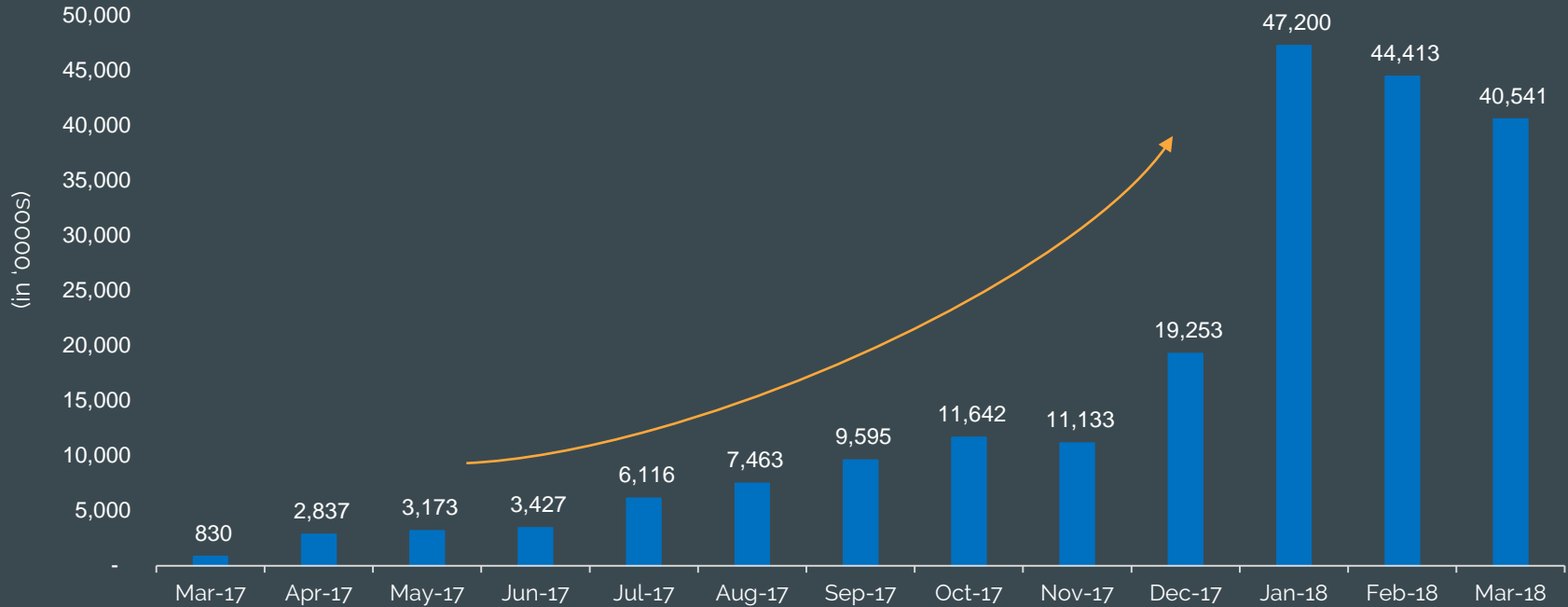


# WeChat User Base



# WeChat Mini App Monthly Active Users

Monthly active users within WeChat's mini program ecosystem reached **472 million** in Jan 2018.



# WeChat Mini Program Statistics



**580,000**  
mini programs

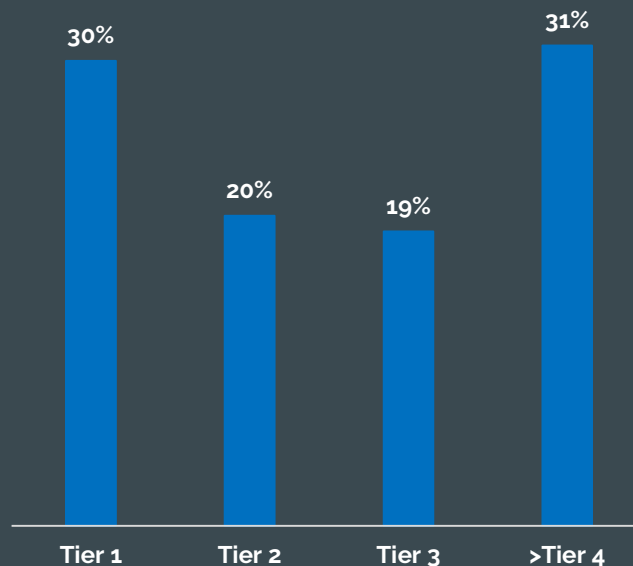


**1,000,000**  
third party developers



**170,000,000**  
daily active users

Many users from lower tier cities are also using WeChat mini programs



# WeChat Mini Games

**100,000,000**

daily active users on Tiao Yi Tiao (跳一跳)

User demographic breakdown:

**37%**

active gamers

**41%**

casual gamers

**22%**

non-gamers



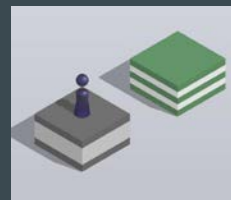
**50%**

male



**50%**

female

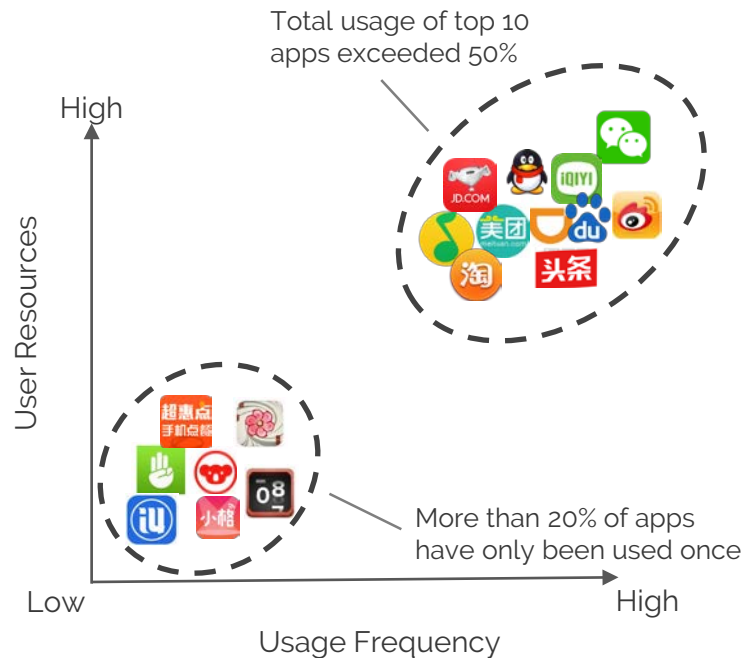


In Detail

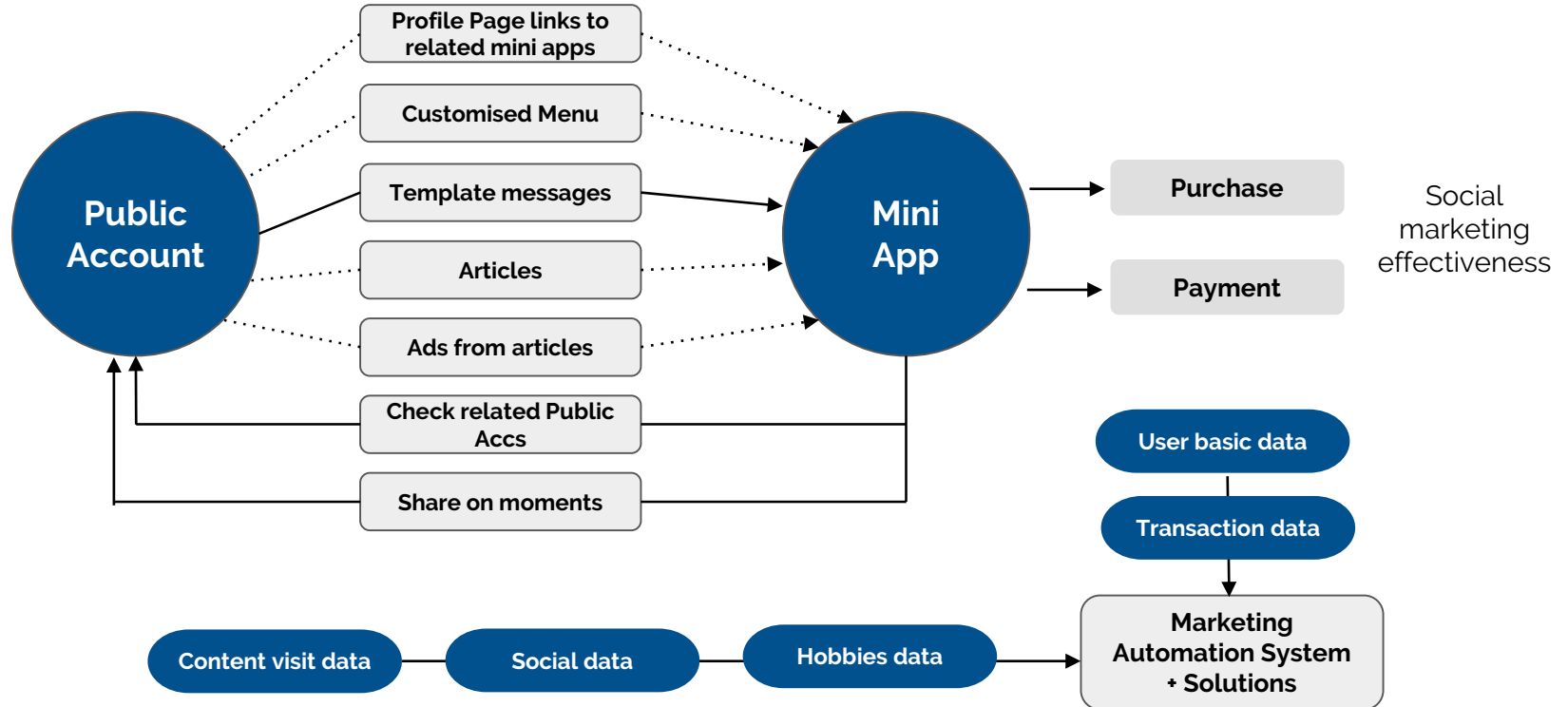
## Value Proposition 1: Aggregate high and low frequency services

With an increasing demand for offline services from users, WeChat mini programs are able to:

- replace or complement popular main apps with simple applications
- provide easily accessible location-based services
- replace long-tailed/low frequency apps

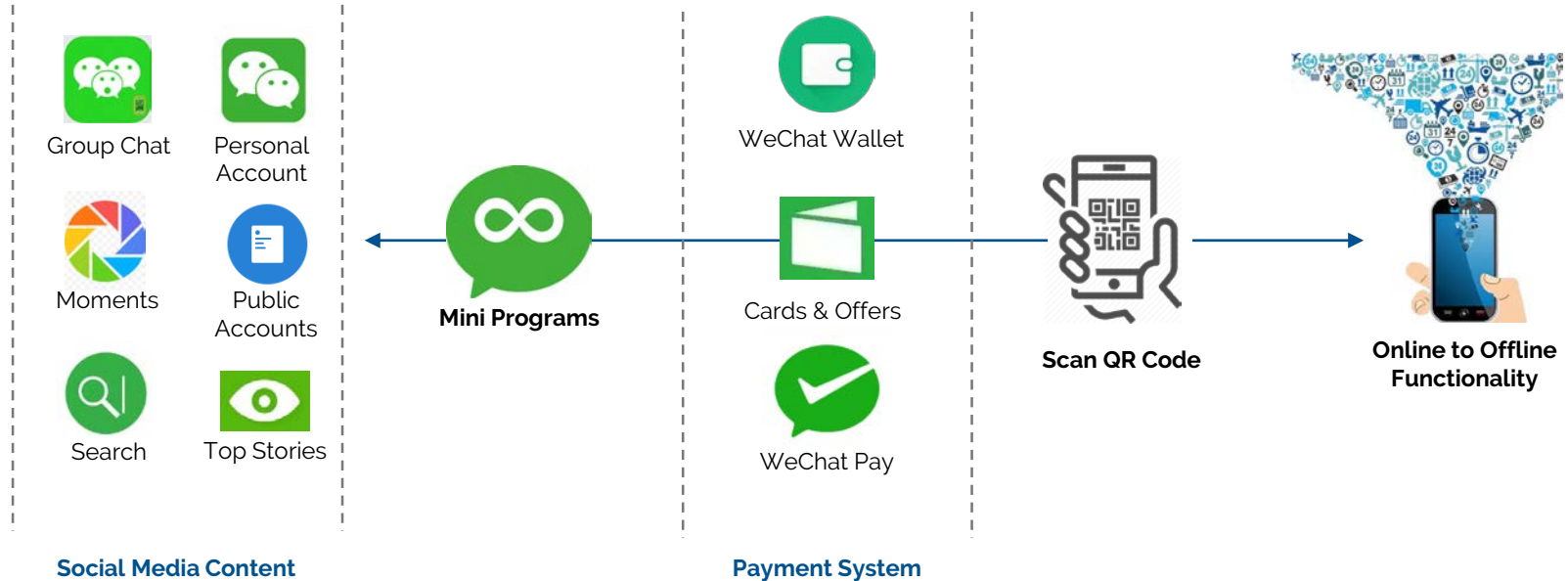


## Value Proposition 2: WeChat public accounts complement mini apps to increase the effectiveness of social marketing













## Value proposition 3: New customer acquisition channel

WeChat Mini Apps connect social media and media outlets. It also integrates WeChat pay, WeChat coupons and other payment systems. Most importantly, it connects all offline businesses to online functionalities, creating an important WeChat operating system.





# Mini Program Rankings

March 2018 Aldzs Ranking	Name	Category
1	 跳一跳 Tiào yī tiào	Game
2	 欢乐斗地主 Huānlè dòu dìzhǔ	Game
3	 成语猜猜看 Chéngyǔ cāi cāi kàn	Game
4	 京东购物 JD.com	Ecommerce
5	 拼多多 Pīn duōduō	Ecommerce
6	 猫眼电影演出 Maoyan	Lifestyle
7	 摩拜单车 Mobike	Lifestyle
8	 星途 WeGoing	Game
9	 黑咔相机 Philm	Lifestyle
10	 知乎答题王 Zhihudatiwang	Game

# Third party platforms

The WeChat public platform (微信开放平台) certifies third party platform (第三方平台) companies so that they can help other businesses to register their mini program through them, and develop mini programs for them.



**580,000**

mini programs



**2,300**

third party companies

# Use Cases Across Different Sectors



**Retail**



**Lifestyle**



**Ecommerce**



**Games**



**Government Services**

# Retail

Yonghui supermarket (永辉超市) has a mini program which allows consumers to scan QR codes, shop, then pay directly and leave the store so that consumers do not have to stand in long queues.

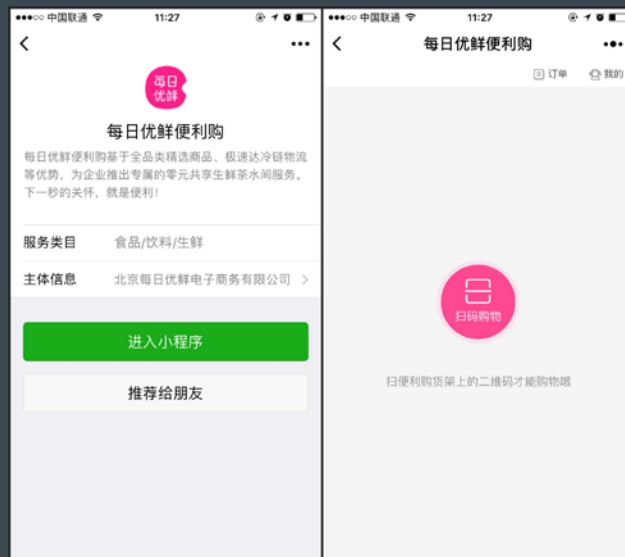
Meiyijia convenience store (美宜佳便利店) integrated discount coupons in the mini program while Family Mart's gift card mini app takes advantage of WeChat's social aspect and allows consumers to present gift cards to each other.



Yonghui supermarket (永辉超市)



MrFresh (每日优鲜便利购) retail shelves



MrFresh (每日优鲜便利购) has a mini program that enables consumers to scan a QR code, pick their food item, then pay directly without leaving their office.

# Ecommerce

## Platform ecommerce

- Ecommerce companies such as JD, Pinduoduo, and Mogujie have created their own mini programs which serve as a new sales channel



## Content ecommerce

- As WeChat is home to a lot of original content that is increasingly linked to ecommerce, mini programs open new revenue streams for content creators and allow them to monetize their follower base
- Rebecca (黎贝卡) WeChat public account created a brand store mini program and added 1 million users in about seven minutes



## Brand ecommerce

- Brands can create membership systems to achieve higher user retention
- Starbucks created a mini program that provides membership privileges, features that include adding points, purchasing, sharing, and sending gift cards



# Lifestyle

When users open the mini program nearby (附近的小程序) function, they will see a list of local businesses including restaurants, beauty salons, coffee shops showing how far they are from the user with their address.

Mini programs have a low threshold for users to access service, thus enabling it to cater to a large potential user base.

Merchants can maximize the traffic to online services and make better transaction scenarios, and then have their customers linked to merchant's public accounts.

As a result, merchants are able to utilize more channels to interact with the consumer, creating more touch points, and ultimately enhance the user experience expand its overall user base.

Bike rental and mobile charger rental mini programs are the most often used as users are able to locate services immediately with mini programs.



# Government Services

Provincial governments have begun to use mini programs which offer legal services and allow citizens to inquire about cases, pay fines, among other features.

Intermediate People's Court of Guangzhou (广州微法院) has a mini program where they upload video of court trials and the Guangzhou Traffic Police has a mini program through which citizens pay fines.

These mini programs increase the efficiency of government processes and are able to cater to the specific needs of citizens.



# Games

WeChat released mini games (小游戏) on December 28 2017. These mini games are a subcategory of mini programs that will expand the content of mini program services.

Developers can incorporate improved interactive and entertainment features to attract users.



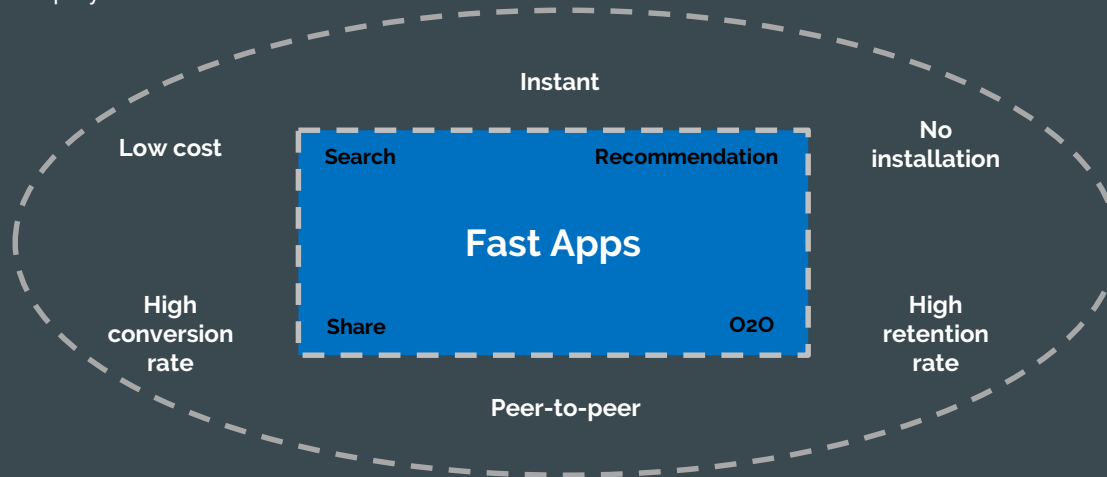


# Risk and Competition

China smartphone has formed an alliance on apps distribution which may pose a threat to the usage of WeChat mini apps.

These newly developed “fast apps” are similar, HTML-based lite apps that can be instantly launched without downloading, and will be introduced by a group of 10 Chinese smartphone vendors.

Huawei, Oppo, Vivo and Xiaomi are cooperating with six smaller brands for Quick App, which lets users access a range of services, including mobile payments.



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