2017 China’s Sharing Economy Industry and User Research Report
Chinese Sharing Economy Industry VS Global Sharing Economy Industry—Market Size

With Eye-Catching Performance, Chinese Market Will Become a Fertile Ground For Developing Sharing Economy.

In 2015, the revenue of global sharing economy reached $251.9 billion dollars, 33% of which were contributed by Chinese market. Fueled by such factors as the huge netizen base, the rise of the millennials, the service-oriented trend of consumption, and the gradual improvement of infrastructures established by leading internet enterprises, China’s sharing economy was estimated to account for 40% in the global sharing economy market by its revenue of $230 billion dollars. Moreover, its compound annual growth rate will be up to 54% then. Overall, China will play a leading role in the global sharing economy industry.

Revenue of China’s Sharing Economy Market 2015-2018

- Revenue of China’s sharing economy market (bn dollars)
- Revenue of sharing economy in other countries (bn dollars)

Source: Roland Berger
Chinese Sharing Economy Industry VS Global Sharing Economy Industry —— Corporate Valuation

Transportation Sharing Sector Had The Most Corporate Valuation And China And America Overtook Other Economies in Unicorn Enterprises Number.

32 enterprises in the sharing economy industry were on the global unicorn leaderboard released by CB Insights in November 2016. In the sharing economy industry, financial sharing sector ranked first by its 7 enterprises and the next were transportation, logistics and space sector. With the corporate valuation of 116.9 billion dollars, transportation sharing sector dominated the sharing economy industry whose corporate valuation exceeded 231.4 billion dollars. Furthermore, the unicorn enterprise Uber had the most corporate valuation. In terms of nations, China and America overtook other economies by 12 and 11 enterprises.

**Number of Unicorn Enterprises in Various Sectors in Sharing Economy Industry in 2016**

<table>
<thead>
<tr>
<th>Sector</th>
<th>Enterprises</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance</td>
<td>7</td>
</tr>
<tr>
<td>Transportation</td>
<td>6</td>
</tr>
<tr>
<td>Logistics</td>
<td>6</td>
</tr>
<tr>
<td>Space</td>
<td>4</td>
</tr>
<tr>
<td>Used Goods</td>
<td>4</td>
</tr>
<tr>
<td>Professional Services</td>
<td>3</td>
</tr>
<tr>
<td>Health Care</td>
<td>2</td>
</tr>
</tbody>
</table>

**Number of Unicorn Enterprises in Global Sharing Economy Industry in 2016**

<table>
<thead>
<tr>
<th>Region</th>
<th>Enterprises</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>12</td>
</tr>
<tr>
<td>America</td>
<td>11</td>
</tr>
<tr>
<td>Others</td>
<td>9</td>
</tr>
</tbody>
</table>

The total corporate valuation in global sharing economy industry exceeded 231.4 billion dollars and Uber had the most corporate valuation.

Source: Data from CB Insights before October 31, 2016.
China’s Sharing Economy Industry Chain in 2016

Note: The enterprises mentioned above may not cover all and were arranged in alphabetical order. As sharing economy industry covered many fields, only typical fields were selected for reference. In addition, enterprises included in logistics sector mainly applied the model of crowdsourcing.

Source: iResearch Counseling and Research Institute

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Transportation Sharing Sector

China and America Led the Global Online Car-Hailing Sector, And DiDi And Uber Dominated The Transportation Sharing Market.

From 2012 to 2016, developed nations including America, Germany and Singapore and the emerging countries with large population such as China and India constituted the principal market for global online car-hailing services. Among them, America accounted for about 40% and China 16%. Therefore, by their combined share of over 50%, China and America played a leading role in the global market. In terms of funds raised by enterprises, DiDi and Uber overtook other enterprises. However, investments will distribute more dispersedly with the rise of other transportation sharing platforms.

GMV Structure of Global Online Car-Hailing Market 2012-2016

Funds Raised in the Global Transportation Sharing Market 2012-2016

Source: CB Insights
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Financial Sharing Sector

Internet Giants Broke in Equity Crowdfunding Market And Have Triggered a Fierce Competition in Blue Ocean Market

According to the *China’s Equity Crowdfunding Industry Report in 2016* issued by Wangdaizhijia, by the end of December in 2016, crowdfunding platforms in operation has increased to 427, up 50.9% from an earlier year. In addition, these platforms succeeded in raising 22.48 billion Yuan and showed a trend of rapid growth. Internet giants also joined in the equity crowdfunding sector to explore new blue ocean market. For example, Dongjia under Jingdong which applied the mechanism of “leading investment + following investment”, Antsdaq under Alibaba which offered financing services throughout the growth period and Baidu Finance. These enterprises accelerated the development of crowdfunding industry.

### Internet Giants Entered The Equity Crowdfunding Market

<table>
<thead>
<tr>
<th>Uptime</th>
<th>Enterprises</th>
<th>Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar. 2015</td>
<td>Jingdong—Jingdong Dongjia</td>
<td>Jingdong Dongjia applied the mechanism of “leading + following investment” to move toward “the model of ecological incubation”.</td>
</tr>
<tr>
<td>Nov. 2015</td>
<td>Alibaba—Antdaq</td>
<td>In cooperation with crowdfunding platforms for Taobao products, Antdaq provided financing services throughout the growth period of enterprises.</td>
</tr>
<tr>
<td>Dec. 2015</td>
<td>360—360Taojin</td>
<td>360Taojin applied the “forward pricing model”.</td>
</tr>
<tr>
<td>Apr. 2016</td>
<td>Baidu—Baidu Baizhong</td>
<td>Based on the Baidu ecosystem, Baizhong provided services throughout the growth period of enterprises.</td>
</tr>
<tr>
<td>Apr. 2016</td>
<td>Suning—Suning Finance</td>
<td>In response to Suning entrepreneurial ecosystem, the mechanism of “lead investment + co-investment” was applied.</td>
</tr>
<tr>
<td>Sep. 2016</td>
<td>Xiaomi—Mifinance</td>
<td>In response to Xiaomi ecosystem, Mifinance applied the mechanism of “recommendation + lead investment + co-investment”.</td>
</tr>
</tbody>
</table>
User Profile

Users Were Mainly The White Collar Workers With High Education.

Profile of Sharing Economy App Users in 2016

Gender
59.3 of users were male.

Educational Background
Generally, users were highly educated and 61.3% of them have got bachelor degree.

Age
56.4% of users aged from 25 to 34.

Marital Status
63.3% of users who were not only married but also had children.

Monthly Personal Income
Most users are middle-income white-collar workers. Among them, those whose salary ranged from 3001 to 8000 Yuan each month accounted for 49.2% while those whose salary ranged from 8001 to 10000 took up 19.2%.

Monthly Family Income
Users whose monthly family income ranged from 8,001 to 20,000 accounted for 47.5% while those whose monthly family income ranged from 20,001 to 30,000 took up 24.5%.

Source: Questionnaire for Behaviors of Chinese Sharing Economy Apps Consumer in 2016. Number of samples is 1,754

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Channels to Know APPs of The Sharing Economy

Social Networking Platform Was the Most Effective Channel for Users To Know The Apps.

Channels to Know The Sharing Economy Apps in 2016

- Social Networking Services: 53.0%
- Friends and Colleagues: 49.1%
- Official Website of the App: 48.0%
- Online Advertising: 47.6%
- Professional Websites and Online Forums: 37.3%
- Offline Promotion Activities: 30.8%
- Newspapers and Magazines: 20.6%
- Others: 0.1%

Source: O6: What channels were used by you to know the APPs? Questionnaire for Behaviors of Chinese Sharing Economy APPs Consumer in 2016. Number of samples is 1,754
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   5.1 The Continuous Popularity of Sharing Economy Will Promote Reforms in Various Fields.
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      Increased Ways to Monetize.
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