

INDUSTRY OVERVIEW

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OVERVIEW OF SOCIAL MEDIA MARKETING SERVICE MARKET IN CHINA

With the rapid development of the digital economy, marketing has become a core component for enterprises to conduct commercial activities and achieve sustainable growth. In an increasingly competitive market environment, product quality and functionality alone are often insufficient for enterprises to establish long-term competitive advantages, driving growing demand for effective marketing strategies and customer engagement.

How to effectively reach target users, build brand awareness, and drive user conversion through effective marketing services has become a key factor for enterprises to achieve commercial success. Marketing is an important means for enterprises to promote their products and services, and has evolved into a critical infrastructure connecting enterprises and consumers, driving brand growth and realizing commercial value. The adoption of the mobile internet is fundamentally reshaping consumers’ methods of obtaining information and their consumption decision-making process. Consumers are relying on social media, content platforms, and online communities to obtain product information, user reviews, and usage experiences during the purchasing decision-making process. At the same time, the social media industry has been undergoing a continuous development with content formats, including graphics, text, short videos and live streaming, and user interaction models steadily upgrading from basic information dissemination to a more diversified ecosystem driven by content seeding, interest-based engagement, and community interaction. Enterprises need to continuously reach potential users through marketing approaches centered on social media platforms in order to enhance brand exposure, user engagement, and conversion efficiency, thereby achieving monetization and business growth.

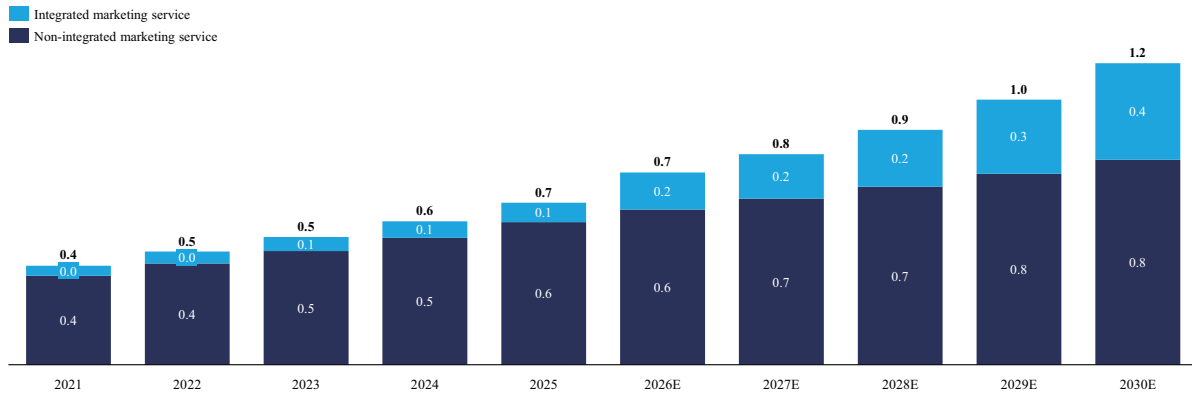
Development of Social Media Marketing Service Market in China

Social media marketing services refer to services that enhance the effectiveness of enterprises’ marketing activities conducted on social media platforms through the analysis and modeling of large-scale user behavior data, content data and marketing performance data generated on social media platforms. Size of social media marketing service market in China is expected to further increase to RMB1.2 trillion in 2030 from RMB0.7 trillion in 2025 with a CAGR of 12.6% from 2025 to 2030.

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Size of Social Media Marketing Service Market in China
RMB Trillion, 2021-2030E

CAGR	2021-2025	2025-2030E
Total	13.1%	12.6%
Integrated marketing service	18.4%	35.2%
Non-integrated marketing service	12.5%	7.5%



Source: State Administration for Market Regulation, Frost & Sullivan

Drivers of Social Media Marketing Service Market in China

- Increasing Importance of Social Media Platforms.** With the widespread adoption of the mobile internet and smart devices, the average monthly time spent per capita on typical social media platforms in China rose from approximately 41 hours in 2021 to approximately 56 hours in 2025, and is expected to reach approximately 95 hours in 2030. Through mechanisms such as algorithm-based recommendations, making social media platforms have become important channels for information, entertainment, and social interaction, as well as key sources influencing consumer purchasing decisions. As user attention continues to concentrate on social media platforms, enterprises conduct brand communication, product promotion, and user interaction through social media platforms to build brand awareness and influence purchasing decisions within users’ daily consumption scenarios, driving the sustained growth of the social media marketing and services market.
- Complexity of the Social Media Marketing Ecosystem.** As the number of social media platforms continues to increase and marketing approaches become increasingly diversified, enterprises are required to simultaneously manage multiple platforms, influencer resources, traffic resources, and advertising formats when conducting social media marketing activities. There are differences among platforms in terms of content formats, user demographics, and advertising delivery mechanisms, which have resulted in high operational and management complexity for enterprises during the execution of marketing campaigns. Meanwhile, the influencer ecosystem has evolved into a pyramid-shaped structure ranging from top-tier influencers (influencers with over one million followers) to long-tail influencers (influencers with between ten thousand and one hundred thousand followers), alongside continuous innovation in content formats and interactive scenarios such as live streaming and immersive engagement formats. Such complexity has created operational pain points for enterprises, making it a key driver of demand for social media marketing services.

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- ***Rapid Advancement of AI Technologies.*** With the development of AI technologies, the production methods of social media marketing activities are undergoing significant transformation. Traditional marketing and traditional campaign execution and management often rely heavily on manual coordination. In contrast, AI technologies can assist enterprises in streamlining campaign reporting and performance analysis, automating workflow management, thereby improving operational efficiency for service providers.
- ***Professionalization and Diversification of Influencers.*** The increasing maturity of influencers and their supporting ecosystem has ensured a stable supply of high-quality content. Influencers generally include key opinion leaders with broad influence and large follower bases, and key opinion consumers who are perceived as more authentic and engagement-oriented within niche communities. The professionalization of influencers, and the development of MCNs, represents progress within the industry. These agencies provide influencers with support in areas such as content planning, audience growth and commercial operations, while also promoting industry standardization alongside maintaining service quality and reliability.
- ***Enterprise Digital Transformation Drives Demand for Intelligent Marketing Services.*** As enterprise digital transformation continues to deepen, enterprises are relying on data analytics and technological tools to improve marketing efficiency. Traditional marketing activities rely on human experience and are less capable of achieving scalable operations and real-time optimization in complex digital marketing environments. Social media marketing services can help enterprises achieve precise user insights, automated marketing execution, and continuous optimization of marketing performance through the analysis of user behavior, marketing and platform data.
- ***Sustained Growth in Chinese Enterprises’ Outbound Expansion Demand.*** As Chinese enterprises expand into overseas markets in industries such as cross-border e-commerce, demand is increasing for social media marketing services with capabilities in managing multi-platform operations and understanding platform distribution mechanisms across overseas social media ecosystems. The internationalization of Chinese social media platforms has also created additional opportunities for overseas brand promotion and user acquisition. In addition, enterprises face multiple challenges during outbound expansion, including language, cultural, and compliance, which continue to drive demand for integrated marketing services with full-funnel social media marketing capabilities.

Future Trends of Social Media Marketing Service Market in China

- ***Integrated Marketing Service Has Become an Important Model for Social Media Marketing Services.*** As social media marketing service offerings continue to diversify, standalone marketing service approaches are no longer sufficient to satisfy the diversified social media marketing needs of enterprises. Through the systematic integration of various marketing service approaches, including content creation and production, influencer collaboration, media placement, and data analytics, integrated marketing service helps enterprises expand contents and audience engagement, and creates synergies across different social media platforms, thereby improving marketing efficiency and enhancing the consistency of brand communication. Social media marketing services are expected to further support integrated marketing models through data analytics and intelligent algorithms, enabling coordinated optimization across different social media marketing channels.

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- ***Data-Driven Precision Marketing Services Continue to Deepen.*** As the volume of data generated by social media platforms continues to increase, enterprises are able to obtain abundant user behavior data and marketing performance data in a compliant manner. Through the analysis and modeling of such data, social media marketing services can help enterprises build more precise user profiles and implement increasingly refined marketing strategies, thereby driving higher marketing efficiency and conversion performance.
- ***Emergence of Generative Engine Optimization.*** With the advancement of LLMs, users are obtaining information, conducting inquiries and seeking consumption recommendations through AI-powered applications. As AI models are capable of understanding, integrating and recommending based on user demands, thereby exerting influence on user decision-making processes. As a result, generative engine optimization has emerged as a new marketing approach focused on improving the visibility and recommendation probability of brands and products within AI-generated content. By optimizing AI model recommendation logic, content structures and data sources, social media marketing service providers can help enterprises to improve the exposure and recommendation probability of their brands or products within AI-generated content, thereby attracting user attention in AI-driven information acquisition scenarios. In addition, AIGC is expected to further penetrate the entire process of social media marketing services in the future, including creative generation, material production, influencer matching, campaign optimization and performance analysis, thereby driving the evolution of social media marketing services toward automation, intelligence and scalability.

Key Success Factors and Entry Barriers of Social Media Marketing Service Market in China

- ***Qualification and Experience Barriers.*** Qualification and experience barriers are primarily reflected in the ability to provide in-depth marketing insights to diversified customers across industries. Service providers are required to accumulate long-term experience and expertise across different industries and social media platforms to develop a nuanced understanding of content trends, user behavior and algorithmic distribution mechanisms that determine content visibility and engagement. In addition, social media platforms generally establish tiered service provider management systems, under which selected service providers may obtain commercial support based on their service capabilities and historical performance records. Complex marketing projects rely on qualified service providers to access professional campaign planning, influencer management, content operation and performance optimization services. Access to certain platform resources, operational tools and data capabilities is generally concentrated among selected service providers with established operational records and customer resources, further strengthening industry barriers. A diversified cross-industry customer base also enables service providers to accumulate broader marketing experience and data insights, enhancing service capabilities and customer stickiness. Coupled with relatively high customer switching costs, new entrants generally require a relatively long period of time to establish industry reputation and customer resources, which further increases the difficulty of market entry to a certain extent.

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- ***Capital Barriers.*** The social media marketing services providers generally need substantial working capital. When conducting marketing campaigns for customers, marketing service providers are often required to prepay relevant expenses associated with advertising placements, influencer collaborations and platform resource procurement, while brand customers typically maintain relatively long settlement cycles, resulting in pressure on enterprises’ capital turnover during business expansion. Accordingly, enterprises are required to possess strong financial capabilities and stable financing channels in order to support continuous business expansion and growing customer demand. New entrants with relatively limited financial resources may therefore face significant capital pressure during business expansion and customer acquisition, thereby forming certain capital barriers.
- ***Operational Efficiency and Cost Management Barriers.*** In the early stages, traffic acquisition costs were more dependent on advertising scale and financial strength. However, as advertising bidding mechanisms become mature and traffic dividends diminish, higher requirements are imposed on operational efficiency, creative material iteration, audience segmentation, advertising strategies and data analytics capabilities. Against such backdrop, service providers with refined operational capabilities and cost management are able to achieve superior ROI through continuous optimization of conversion paths and advertising models, thereby establishing cost and operational barriers centered on data capabilities and operational efficiency.
- ***Talent Barriers.*** The effective implementation of social media marketing services is highly dependent on multidisciplinary talent teams, including advertising placement and optimization personnel with capabilities in data analytics and algorithm comprehension, as well as content and operations personnel possessing creative planning capabilities. The cultivation cycle for such talent is relatively long, and talent gaps are difficult to address through short-term recruitment. As a result, service providers with mature teams and systematic talent pipelines are able to establish sustained competitive advantages in areas such as strategy formulation, execution efficiency and performance optimization, thereby creating relatively high talent barriers to entry.
- ***Data Analytics and Application Barriers.*** Social media marketing services rely on continuous analysis of data and ongoing training and optimization of content dissemination effectiveness, which constitute an important foundation for achieving precision marketing and advertising optimization. New entrants lacking sufficient data accumulation and analytics capabilities often face difficulties in establishing effective marketing models and optimization mechanisms, thereby making it difficult to provide competitive services. In addition, data analytics and related applications can assist companies in improving internal operational efficiency, thereby enabling scalable business growth with enhanced efficiency during business expansion.

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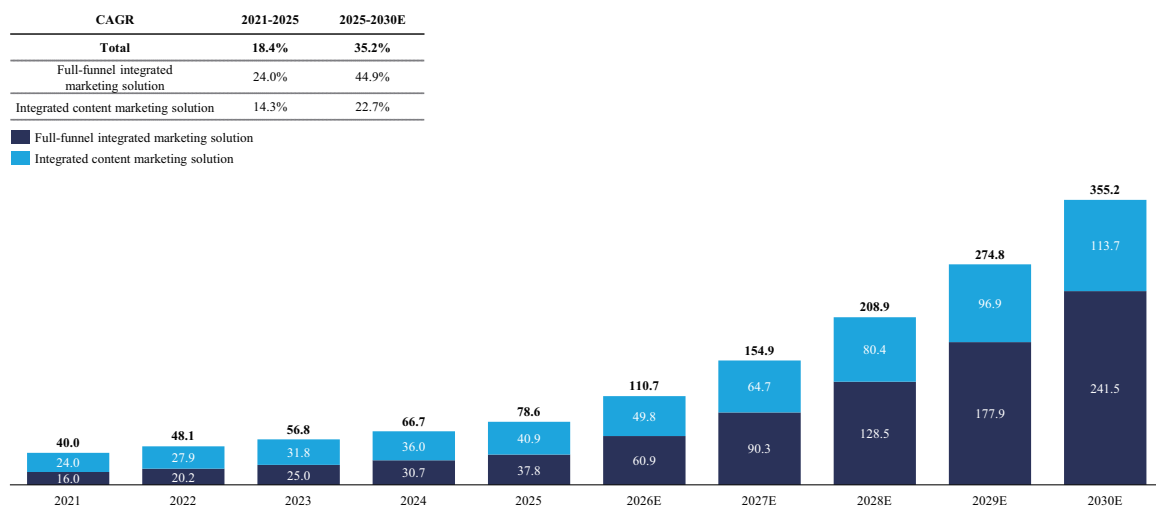
OVERVIEW OF INTEGRATED SOCIAL MEDIA MARKETING SERVICE MARKET IN CHINA

Development of Integrated Social Media Marketing Service Market in China

Integrated social media marketing services refer to marketing services conducted across social media platforms that integrate influencer marketing, paid media placement, and services such as content creation, account operation, campaign execution management and performance evaluation based on advertisers’ objectives under a unified marketing strategy. Integrated social media marketing services enable brand customers to achieve brand promotion, user engagement and conversion enhancement through coordinated management of content, influencer resources and advertising traffic across social media platforms.

Integrated social media marketing services are distinct from standalone influencer marketing or standalone media placement services. Instead, they involve the coordinated planning, allocation, and optimization of content, influencers, traffic resources, account operations, and performance analytics under an integrated marketing objective. Through integrated social media marketing services, customers can reduce the communication and coordination costs associated with engaging multiple service providers, while improving campaign consistency, execution efficiency, and the measurability of marketing outcomes. The size of integrated social media marketing service market in China is expected to further increase to RMB355.2 billion in 2030 with a CAGR of 35.2% from 2025 to 2030 where full-funnel integrated marketing solution and integrated content marketing solution has reached RMB37.8 billion and RMB40.9 billion in 2025, respectively, and is expected to further increase to RMB241.5 billion and RMB113.7 billion in 2030, respectively.

Size of Integrated Social Media Marketing Service Market in China
RMB Billion, 2021-2030E



Source: State Administration for Market Regulation, Frost & Sullivan

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Drivers and Future Trends of Integrated Social Media Marketing Service Market in China

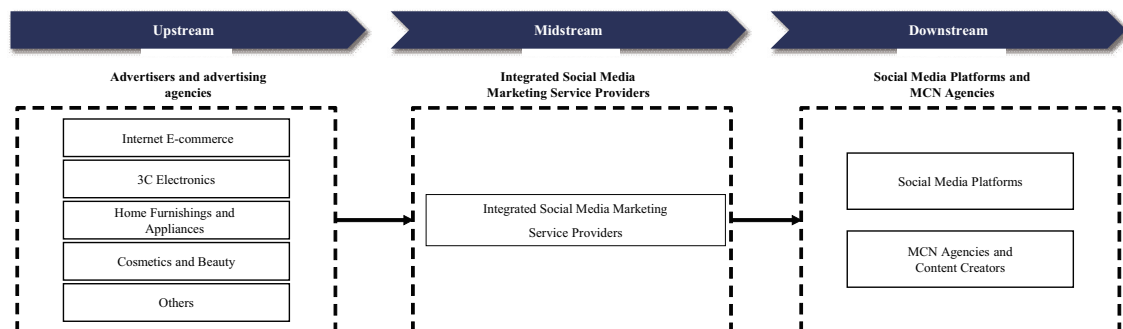
- ***Continued Growth of the Influencer Marketing and Paid Media Placement Provides a Growth Foundation for Integrated Social Media Marketing Services.*** Influencer marketing helps brands build consumer trust and influence purchasing decisions through content seeding, product reviews, audience engagement and word-of-mouth communication, while paid media placement enhances campaign reach and conversion efficiency through targeted advertising and traffic acquisition. As brand customers continue to increase their spending on influencer marketing and paid media placement, integrated marketing service providers are increasingly able to coordinate influencer content and platform traffic under a unified strategy to improve budget efficiency and marketing effectiveness. The continued growth of both the influencer marketing and paid media placement markets is expected to provide a solid foundation for the expansion of the integrated social media marketing service market.
- ***Increasing Demand for One-Stop Integrated Social Media Marketing Services.*** As social media marketing increasingly involves the coordinated execution of content creation, influencer engagement, paid media placement, account operation and performance evaluation across multiple platforms, customers are placing greater emphasis on unified marketing strategies, coordinated resource allocation, centralized project management and comprehensive performance assessment. As a result, demand for one-stop integrated social media marketing services is expected to continue increasing. Service providers capable of integrating content creation, influencer resources, paid media traffic, account operation and data analytics under a unified framework are expected to be better positioned to help brand customers improve marketing effectiveness, execution efficiency and campaign consistency. The growing demand for integrated service offerings is expected to be an important driver of the integrated social media marketing service market.
- ***Growth of AI Agent Platforms Creates Marketing Demand.*** The rapid development of AI agent platforms is creating emerging advertisers with strong needs for user acquisition and brand building. As competition among AI agent providers intensifies, market participants are expected to increasingly invest in influencer engagement and paid traffic acquisition to enhance brand awareness, attract users and promote product adoption across social media platforms. In addition, the frequent launch of new functions requires continuous user education and market communication, creating sustained demand for integrated Social Media marketing services. As a result, the expansion of the AI agent platform is expected to become an important driver of growth for the integrated social media marketing service market.

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- Increasing Complexity of Platforms, Influencer Ecosystems and Content Formats Drives Demand for Professional Integrated Marketing Service Providers.*** The continued development of short-form video, graphic contents, content communities, search-based discovery and social commerce has increased the complexity of social media marketing. Brand customers are required to manage multiple platform rules, content formats, influencer tiers, traffic mechanisms and performance metrics simultaneously. At the same time, influencer ecosystems have expanded beyond top-tier influencers to include mid-tier and long-tail influencers, KOCs, KOSs and MCN agencies. While the broader range of resources enhances brand reach, it also increases the complexity of influencer selection, resource matching, content review, campaign scheduling, budget management and performance evaluation. As a result, integrated marketing service providers with cross-platform resources, influencer management capabilities, paid media expertise, project coordination capabilities and data analytics capabilities are expected to become increasingly important to brand customers.
- Advancements of AI and Big Data Technologies Accelerate the Intelligent Transformation of Integrated Marketing Services.*** As marketing workflows become longer, execution processes become more complex and the volume of influencer and advertising data continues to increase, integrated marketing service providers are increasingly leveraging AI and data tools to improve influencer matching, content review, campaign optimization, project management and post-campaign analysis. The value of AI and data lies not merely in replacing manual work, but in transforming accumulated project experience, platform rules, content performance data and advertising insights into reusable tools and standardized processes. Advancements of AI and big data technologies enable service providers to maintain delivery consistency and operational efficiency while managing larger and more complex marketing campaigns, and thus driving the overall market growth.

Value Chain of Integrated Social Media Marketing Service Market in China

The upstream segment of social media marketing service market in China primarily consists of brand customers across various industries such as internet e-commerce, 3C electronics, home furnishings and appliances, cosmetics and beauty, and others. The midstream includes integrated social media marketing service providers. The downstream segment consists primarily include various social media platforms, MCN agencies, and content creators.



Source: Frost & Sullivan

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Competitive Landscape of Integrated Social Media Marketing Service Market in China

Integrated social media marketing service market in China is relatively fragmented. In terms of revenue in 2025, the Company is the second-largest integrated social media marketing service provider in China.

Top Integrated Social Media Marketing Service Providers in China (2025)			
Ranking	Company	Revenue (RMB Billion)	Market Share (%)
1	Company A	3.2	4.0%
2	The Company	1.4	1.8%
3	Company B	1.3	1.7%
4	Company C	1.3	1.6%
5	Company D	1.2	1.5%

Notes:

- (1) Company A is an integrated social media marketing service provider founded in 1996, headquartered in Beijing, which primarily provides brand promotion services, advertising agencies, metaverse marketing, and among others.
- (2) Company B is an integrated social media marketing service provider founded in 2018, headquartered in Wuhan, which primarily provides targeted marketing solutions, social commerce management services, and among others.
- (3) Company C is an integrated social media marketing service provider founded in 2006, headquartered in Shanghai, which primarily provides advertising services in the social media and digital media sectors.
- (4) Company D is an integrated social media marketing service provider founded in 2020, headquartered in Shanghai, which primarily provides brand consulting services, creative planning services, and among others.

Source: Annual reports, Expert interview, Frost & Sullivan

Key Success Factors and Entry Barriers of Integrated Social Media Marketing Service Market

- **Barrier to One-Stop Integrated Delivery Capabilities.** As customers increasingly seek one-stop integrated marketing solutions across influencer marketing, paid media placement, content creation and account operation, leading service providers are required to possess the ability to coordinate content strategy, influencer resources, paid media placement, account operation, campaign execution and performance evaluation under a unified marketing framework. Such capabilities require service providers to possess comprehensive expertise in marketing strategy, resource coordination, cross-functional collaboration, project management, financial settlement and performance measurement, while serving as a single accountable partner for advertisers' increasingly complex marketing objectives. New market entrants often face challenges in establishing a comprehensive integrated delivery system within a short period of time, creating a substantial barrier to entry.

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- ***Barrier to Major Social Media Platform Partnerships and End-to-End Service Qualifications.*** Social media platforms constitute a critical foundation for the delivery of integrated marketing services. Leading service providers have typically established long-term partnerships with major social media platforms and obtained relevant qualifications, certifications, access to data and marketing tools, marketing resource support and commercial incentive programs. These platform relationships enable service providers to access media inventory, traffic resources, platform tools, advertising opportunities and incentive policies more efficiently, while enhancing their ability to execute cross-platform marketing campaigns. As social media platforms generally prefer to collaborate with service providers that possess established service capabilities, proven execution track records and strong compliance standards, new entrants often face significant challenges in obtaining comparable levels of platform resources, certifications and commercial support within a short period of time, creating a meaningful barrier to entry.
- ***Barrier to Paid Media Placement Capabilities.*** In integrated social media marketing, organic distribution of influencer content helps build consumer trust, while paid media placement expands audience reach, improves targeting precision and enhances the measurability of marketing outcomes. Leading service providers are required to possess deep expertise in the advertising products, bidding mechanisms, audience targeting tools, budget allocation strategies, creative testing methodologies, and real-time optimization capabilities of major social media platforms. They must also be able to coordinate paid media placement with content creation, influencer engagement and account operation under a unified marketing strategy. Such capabilities differ from those of traditional media buying agencies, as they emphasize the coordinated content distribution, influencers and traffic resources to achieve common marketing objectives. For new entrants lacking advertising execution experience or content marketing expertise, it is often difficult to simultaneously balance content authenticity, campaign efficiency and conversion performance.
- ***Barrier to Data Accumulation.*** As social media marketing workflows become increasingly complex, platform rules evolve more rapidly and the volume of influencer and advertising data continues to expand, integrated marketing service providers are increasingly required to leverage AI and data analytics capabilities to improve the efficiency of influencer matching, content review, campaign optimization, project management and post-campaign evaluation. The key to these capabilities does not lie in developing foundational AI models, but rather in transforming accumulated project experience, platform rules, content performance insights, influencer collaboration records, advertising data and project management data into reusable business rules, operational tools and management frameworks. Service providers with more mature data assets, extensive project experience and established internal systems are better positioned to maintain delivery consistency and operational efficiency as project scale increases. By contrast, even where general-purpose AI tools are readily available, new entrants often face significant challenges in developing the marketing-specific data assets, operational know-how and organizational processes required to effectively support large-scale service delivery within a short period of time.

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- ***Barrier to High-Quality Brand Customer Relationships and Cross-Industry Project Experience.*** Integrated social media marketing services often involve brand strategy, content planning, budget management, conversion optimization and cross-functional coordination. As a result, brand customers typically prefer service providers with proven delivery capabilities, extensive cross-industry experience and strong project management expertise. Through long-term partnerships with leading brands, established service providers are able to accumulate valuable experience across different industries, social media platforms, content formats and marketing objectives, and continuously apply such insights to campaign planning, resource allocation and performance optimization. By contrast, new entrants often lack established customer relationships, benchmark project cases and accumulated operational know-how, which may limit their ability to secure budgets from large brand customers and undertake complex integrated marketing projects.

SOURCE OF INFORMATION

In connection with the [REDACTED], we have engaged Frost & Sullivan to conduct a detailed analysis and prepare an industry report on the markets in which we operate (the “**Frost & Sullivan Report**”). Services provided by Frost & Sullivan include market assessments, competitive benchmarking, and strategic and market planning for a variety of industries. We have agreed to a total of RMB500,000 in fees and expenses for the preparation and use of the Frost & Sullivan Report. The payment of such an amount was not contingent upon our successful [REDACTED] or on the results of the Frost & Sullivan Report. Apart from the Frost & Sullivan Report, we have not commissioned any other industry report in connection with the [REDACTED].

We have extracted certain information from the Frost & Sullivan Report in this section, as well as in the sections headed “Summary,” “Risk Factors,” “Business,” “Financial Information” and elsewhere in this document to provide our potential [REDACTED] with a more comprehensive presentation of the industries in which we operate. Unless otherwise noted, all of the data and forecasts contained in this section are derived from the Frost & Sullivan Report, various official government publications and other publications. Frost & Sullivan prepared its report based on its in-house database, independent third-party reports and publicly available data from reputable industry organizations. Where necessary, Frost & Sullivan contacts companies operating in the industry to gather and synthesize information in relation to the market, prices and other relevant information. Frost & Sullivan believes that the basic assumptions used in preparing the Frost & Sullivan Report, including those used to make future projections, are factual, correct and not misleading. Frost & Sullivan has independently analyzed the information, but the accuracy of the conclusions of its review largely relies on the accuracy of the information collected. Frost & Sullivan’s research may be affected by the accuracy of these assumptions and the choice of these primary and secondary sources.