Chinese consumers at the forefront of digital technologies
China Mobile Consumer Survey 2018
## Contents

- Key findings .................................................. 1
- Chinese users’ preference for new mobile phones ............. 4
- China pioneering AI-based mobile apps .................... 7
- Dominant fingerprint authentication ........................ 8
- Stagnant used mobile phone market ........................ 9
- Pervasive video contents .................................... 10
- Overwhelming mobile payment .............................. 13
- World leading Chinese high-tech homes .................... 14
- Dawn of unlimited mobile phone data ....................... 16
- Chinese users’ inclination for data privacy ................. 18
- Authors and Contacts ........................................ 21
Key findings

01. Chinese users’ preference for new mobile phones

02. China pioneering AI-based mobile apps

03. Dominant fingerprint authentication

04. Stagnant used mobile phone market

05. Pervasive video contents

06. Overwhelming mobile payment

07. World leading Chinese high-tech homes

08. Dawn of unlimited mobile phone data

09. Chinese users’ inclination for data privacy
01 Chinese users frequently replace their mobile phones

• China's smartphone ownership surpasses the global average, leading the world.
• With the high ownership, the lifecycle and replacement frequency of mobile phones held by Chinese users are significantly higher than those of global users.
• Driven by new functions and high cost performance, Chinese users are still desired to replace smartphones.

02 China is pioneering AI-powered mobile apps in the world

• Thanks to massive search data, diversified product lines and vast user demands, China has seen rapid growth in AI-powered mobile apps. Several technologies in AI technology layer, including semantic analysis, speech and image recognition, have been applied quickly in Chinese mobile phone market. Speech assistant, translation app, image classification and customized news push have also been available.

03 Fingerprint authentication dominates the biometrics sector

• Fingerprint authentication has overtaken password recognition to go definitely mainstream in China. Global users apply password recognition to unlocking, authorized payment and transfer more frequently than China.
• Besides, AI-based facial recognition and speech recognition are the two fast developing recognition technologies only second to fingerprint authentication. With the rapid growth of AI and Internet of Things (IoT) in China, the country is expected to usher in an era of face scanning.

04 Used phone market is stagnant

• Chinese users are frequently replacing their mobile phones, making them lie idle or unused. Leaving these phones unused is the most common treatment way among Chinese and global users.
• Upstream and downstream mobile phone companies, including online used mobile phone stores, operators and manufacturers, gain little from sales at a discount and old for new services, due to low costs of replacement and recycle and limited recycle channels. The future looks uncertain for China's used mobile phone market.

05 Pervasive video contents

• Video contents are becoming the information source for users. Videos are one of content forms with the highest consumption and production frequency, including video news, TV programs and funny videos. Chinese users spend more time in contents than the global average. Video aggregation platforms with featured social networking, addictive fragmented and personalized content pushes capture more user time from social media and quickly sweep across the country. In the future, video aggregation platforms need to offer more effective and valuable contents for users.
• The fast growing mobile internet in China changes the shopping and payment ways. Compared to global users, the percentage of mobile phones used to manage personal banking accounts and pay for shopping in China is well above the global average. Easy operation and the building of online and offline application scenarios enable mobile payment to replace bank cards as the inseparable wallet of Chinese mobile phone users.

07 China's high-tech homes lead the world

• The ownership of different categories of smart home products is well above the global average. Driven by domestic consumption upgrading, AI and IoT technologies, China's smart home market has come to the fore. Smart speakers are highly sought-after scenario-based target for manufacturers. In the future, companies should build value and service models for users during the scenario-based interactions and build a sustainably growing ecosystem.

08 The era of unlimited mobile phone data is coming

• With the implementation of “network speed upgrade and tariff reduction” policy and cooperation between operators and internet software platforms, the rate of mobile phone data has been reduced in China and Chinese users are moving from seeking wifi for free during the early days in 4G age towards an era of conditional unlimited data. The full liberalization of mobile phone data plans brings about both challenges of declining revenues in data and huge opportunities for operators. As the upcoming 5G will generate significant impact on operators' business models, operators should be aware of their role transition early in the 5G era and explore more diversified revenue streams.

09 Over 90% Chinese users require data privacy

• Chinese and global users are generally aware of their personal information being used by companies and third parties. Chinese users care more about their personal data being used and stored than global users. Businesses should pay attention to the attitude of Chinese users on their personal information and secure users' personal data effectively.
Chinese users’ preference for new mobile phones

China ranks first globally in the mobile phone ownership

- In 2018, smartphone ownership in China reaches 96%, an year-on-year increase of 7%, 6% higher than the global average ownership.
- Rising domestic smartphones: Domestic smartphones are eroding the traditional mobile phone market and sinking deeper into third- and fourth-tier Chinese cities, raising the smartphone ownership in China continuously.
- Fiercely competitive mobile phone market: China’s mobile phone market has become red ocean with nearly-saturated segments from thousand-yuan smartphones to flagship models. Mobile phones with high configuration at low prices become standard in Chinese market. Combined with the increasing liberalization of Chinese telecommunications operators on the price and specification of data plans, consumers can purchase new mobile phones based on their own demands.

Figure 1: Smartphone ownership of global and Chinese users in 2018

Figure 2: Comparison of smartphone ownership in China in recent years
Chinese users replace mobile phones more frequently than global users

Compared to global users, Chinese users replace their mobile phones more frequently. In the percentage of mobile phones bought after 2017, mobile phones of Chinese users take up nearly 80% while those of global users only account for 58%. 99% existing phones of Chinese users are new ones when purchasing while 10% global users still use second-hand mobile phones.

- Fast iterative functions of Chinese mobile phones: By contrast to the global mobile phone market, Chinese mobile phone makers are way ahead in exploring applications and functions from dual card dual standby, screen unlocking to AI-based beauty shot functionalities. The rapid iteration of mobile phone functions and the emergence of domestic phones with high cost performance stimulate users' demands and accelerate the replacement.

- Low cost of mobile phone replacement for Chinese users thanks to competitive Chinese mobile phone market: China’s mobile phone market has become red ocean with nearly-saturated segments. Mobile phones with high configuration at low prices are springing up, providing Chinese mobile phone users with more options and easy-to-use components for replacement. As a result, Chinese users who prefer new things can replace mobile phones at a relatively low cost.

Figure 3: When Chinese and global users bought their existing mobile phones

Figure 4: Percentage of new mobile phones Chinese and global users have by far
The rate of online mobile phone purchase by Chinese users is much higher than that of global users. From the mobile phone purchase channels, 52% of Chinese users’ mobile phones are bought online while only 28% of global users purchase mobile phones online. In terms of tariff, the prepaid bills of Chinese users account for over 50%.

• The mobile internet thrives in China with the booming e-commerce network. Chinese consumers are accustomed to buying 3C products online due to the high logistics speed and sound mechanisms for returning and changing goods.

• The rates of contract phones have no advantage over prepaid bills in China. Moreover, Chinese users replace their phones frequently, and therefore one to two years contract phones cannot satisfy users’ demands on replacement.

Figure 5: Mobile phone purchase channels of Chinese and global users

![Figure 5](image)

Figure 6: Comparison of mobile phone tariffs in China and the global

![Figure 6](image)
China pioneering AI-based mobile apps

Generally, the percentage of AI-based mobile apps used by Chinese users is higher than global users

- On the whole, Chinese users utilize AI-based apps far more than global users.
- Massive data boost the growth of AI-based apps on mobile phones in China. Mobile phones used every day provide enormous amounts of training data for machine learning, making China a superpower in data.
- Thanks to open source communities provided by tech giants, along with massive search data, diversified product lines and vast user demands, China has seen rapid growth in AI-powered mobile apps. Mobile phones are the optimal vehicle for AI-based apps on the customer side.

Figure 7: Comparison of AI-based apps in Chinese and global mobile phones
Dominant fingerprint authentication

Fingerprint authentication dominates China’s mobile phone biometrics sector

Entering into 2018, fingerprint authentication has been fitted as standard in Chinese mobile phones, with an increase of 35% in 2018. Both facial recognition and speech recognition have grown by 26% in 2018. Globally, password identification remains the first choice for unlocking, authorized payment and transfer. Global users apply less fingerprint authentication, facial recognition and speech recognition.

- The application of fingerprint authentication in China is much higher than the global level. As Chinese users are experimental and replace their phones more frequently than global users, they can experience the latest mobile phone biometrics by replacing phones. Fingerprint authentication further improves in 2018. Smarter screen fingerprint authentication has been widely applied by manufacturers in 2018. More fast and easier operations, combined with payment solutions including WeChat and Alipay, enable fingerprint authentication to penetrate deeper.
- The increasing application of technologies such as facial recognition and speech recognition in mobile phones is mainly driven by the wide application of AI in smartphones. As more mobile device manufacturers step into AI sector, AI-based unlocking solutions, including facial recognition and speech recognition will become more popular.

Figure 8: Comparison of biometrics used in Chinese and global users’ mobile phones

Figure 9: Comparison of application in unlocking, authorized payment and transfer by Chinese and global users
Stagnant used mobile phone market

- Over 50% of old mobile phones are lying idle or given to family members by Chinese and global users. Users are still less interested in the used mobile phone market and old for new services. The proportions among Chinese users are 3% and 2% and those among global users are 3% and 1%. Old mobile phones cannot deliver much value for users in the Chinese market with ever growing phone functionalities.
- From the functionality perspective, old mobile phones are lagging behind latest models in several functions for users' daily needs, such as battery life, speed, screen and camera.
- From recycling price, recycling used mobile phones at low prices generates little for users but requires complex evaluation processes. Therefore, users are less interested in used mobile phones.
- Shortening lifecycle of mobile phones has led to an increasing number of e-wastes around the world. Old idle mobile phones have significant impact on the environment and resources and the impact will be increasingly growing with the accelerating elimination of electronic products. Governments should provide early warnings against a series of social problems related to user health, environmental pollution and wastes of social resources. Firstly, governments need to step up efforts in publicity and scientific education and encourage users to dispose their idle mobile phones by recycling and selling at a discount; secondly, they can develop environmental friendly mechanisms to recycle electronic products and make clear regulations on treatments of polluting and recyclable components. Finally, governments can urge companies to permanently delete user information in recycled mobile phones and prevent personal information leakages.

Figure 10: Comparison of treatments to old mobile phones by Chinese and global consumers
Pervasive video contents

Pervasive short video related apps

- The proportions of sharing images and videos on social network, using filters and editing images and videos by Chinese users are all above the global average.
- The proportion of taking photos is slightly lower than that of global users. The proportions of taking photos by mobile phones, sharing images and videos on social media, filters are 61%, 52%, 48% and 33% respectively. Users spend much time on short video platforms with their mobile phones.
- The Chinese market has been mature in developing cameras with filters and beauty camera software with strong user demands on image and video editing software.
- In 2018, China witnesses a boom in users’ short videos as short video related apps around filters, video editing and cross-platform sharing expand rapidly and those embedded with AI algorithms such as intelligent recommendation are extremely addictive with strong communicability and social networking.

Figure 11: Comparison of image and video app usage by Chinese and global users
**Addictive fragmented video contents for Chinese users**

- The time Chinese users spend on contents is longer than the global average. They mainly spend on news, videos on instant messages and video news.
- Video contents are becoming the information source for users: China's short video industry fully thrives in 2018 and short video apps incubated by content aggregation platforms cover many kinds of video contents. Contents that users needed to switch different apps to watch in the past have been aggregated into short video platforms. People's consumption on contents has been fragmented further.
- Overusing mobile phones has great impact on users' physical and mental health and personal safety. In terms of physical health, overusing mobile phones can cause diseases such as impaired vision, cervical spine disease and tenosynovitis; from mental health, it leads to social dysfunction and attention deficit and poor independent thinking skills; moreover, it also gives rise to traffic accidents. Governments need to step up efforts in scientific education and publicity against overusing mobile phones, impose stern punishments and call to account for mobile phone using that impacts road and traffic safety. They can also supervise app and software developers to set up mechanisms preventing youngsters from addiction and reduce the time of users spending on mobile phone apps and software from the very beginning.

**Figure 12: Comparison of content consumption form and frequency in mobile phones by Chinese and global users**
Chinese users prefer to communicate through screens

- By comparing the usage frequency of communications in China and global, 88% of Chinese users apply instant message at least once a day, 86% apply social media and 35% apply group chats by videos at the same frequency, all higher than global users. It is noted that Chinese users utilize email less frequently than global users who check emails at least once a day.

- In the age of mobile internet, mobile phones have covered many offline scenarios frequently used, such as payment, gaming, entertainment and shopping, bringing about a boom in interactive apps including instant message and social media. In addition to communications, interactive communications apps have also been an information aggregator integrating sharing, shopping and searching. Email, a fruit in the PC age, has been widely replaced by interactive communications apps in China where the mobile internet is growing rapidly.

- Chinese users apply video chat more frequently than global users. As an alternative to face-to-face communication, online video chat is highly accepted by Chinese users while global users prefer face-to-face communication.

Figure 13: Comparison of frequency of using mobile phones in daily communication by Chinese and global users
Overwhelming mobile payment

Overwhelming mobile payment in China
The percentage of Chinese users’ deploying mobile devices for banking services is higher than the global average, mainly due to the following factors:

- In the mobile internet world, China has invested heavily in developing internet apps. As mobile banking is easy to operate and Chinese users are highly open to new-type software, mobile banking has been widely used in China.
- Chinese banks focus more on user experience and functionality iteration of apps in the fierce competition inundated with third party payment platforms, and therefore Chinese mobile banking software is easier to operate.

The leading position of mobile phones as a shopping payment tool has been strengthened. From browsing, online order and payment to in-store purchase but online payment, its penetration rate is higher than the global average:

- The high percentage in China is primarily driven by the coverage of mobile e-commerce, third party payment in several real-life scenarios including shopping, dinning, entertainment and mobility.
- The low penetration rate of credit cards facilitates third party shopping payment to grow rapidly in China’s payment sector. As Chinese credit cards have a low penetration rate in installment and cover few scenarios, credit cards are far less penetrated in China than developed countries including the U.S. and Europe, compared with third party payment platforms that are closely connected with consumers such as Alipay and WeChat.

Figure 14: Comparison of application of mobile phones in financial and consumption activities by Chinese and global users
World leading Chinese high-tech homes

Chinese users are highly open to smart homes
The percentage of smart home products used by Chinese users is higher than the global average. The rapid growth is driven by:

• fast implementation of apps: In recent years, the application of AI has been developed quickly in China, especially AI products including smart speakers have created new smart home scenarios for users.
• Widely expanded consumption upgrade in home decoration: Rising personal income has stimulated the consumption upgrade in China. Combined with the curiosity of Chinese users in new things, smart home products that are highly relevant to life are gaining traction.
• Little impact from macro environment including home decoration and real estate: China's new house volume shrank in 2018 and property regulation polices have generated greater impact on home appliance sector than smart home sector. As the largest market of smart homes is renovation rather than new decoration, the shrinking volume of new houses has not influenced the smart home market directly.

Figure 15: Comparison of ownership of sub-categories of smart home products in China and global

<table>
<thead>
<tr>
<th>Product Type</th>
<th>China</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home monitor</td>
<td>25%</td>
<td>12%</td>
</tr>
<tr>
<td>Smart speaker</td>
<td>22%</td>
<td>7%</td>
</tr>
<tr>
<td>Smart lighting</td>
<td>20%</td>
<td>6%</td>
</tr>
<tr>
<td>Smart lock</td>
<td>20%</td>
<td>4%</td>
</tr>
<tr>
<td>Smart socket</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Intelligent temperature controlling</td>
<td>11%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Prominent wearables including smart bracelets and watches

- Wearables including smart bracelets and watches have stood out in the Chinese market, with their respective ownerships of 36% and 23% well above the global average.
- Domestic production at low prices is the main driver to increase the ownership of smart bracelets and watches in China. Currently, low-price smart wearable device companies have dominated China’s smart wearables market.
- Chinese users pay more attention to health. China is going through the period where population aging and digital natives including post-90s and -95s are becoming the main digital consumers, and therefore wearables with fitness and health as the main selling points have been popular among the young generation and the elder market.
- Quick payment: QR codes that are independent from mobile phones and NFC payment function are fast developing in the smart wearables, further increasing the ownership of smart bracelets in the Chinese market.

Figure 16: Ownership of digital devices by Chinese and global users in 2018

Applications of smart bracelets and watches

- Secure location
- Quick payment
- Motion measurement
- Health check
- Social interaction
Dawn of unlimited mobile phone data

Unlimited data plans emerge in the post-4G age

- In 2018, three giant operators in China have launched unlimited data plans (with limits on excessive data), raising the percentage of data users utilizing over 10GB to 42% from 8% in 2017 and close to the global average where unlimited data plans have been available already.
- Along the emergence of data plans with over 10GB per month, short videos and mobile phone gaming have also seen a rampant growth.

The growing mobile consumption and user time are apparently boosting mobile phone data used.

Figure 17: Data usage of Chinese mobile phone users

Figure 18: Data usage of global mobile phone users
Attitude of Chinese digital users towards 5G network

- Driven by the trend of 5G network going mainstream in the next generation mobile phone communication, Chinese digital users are positive about new technologies.
- Research indicates that 38% users say they will use 5G network very soon after 5G comes. 33% users will use 5G after its stabilization, 20% will use it finally and 7% will use it after it becomes the mainstream.
- Similar to the transformation from 3G to 4G network where the upgrading of communication technologies has driven new hardware equipment and infrastructure to update, 5G will also go through such a period.
Chinese users’ inclination for data privacy

Chinese users are more sensitive to personal information leakage than global users

Compared with global users, Chinese users are more sensitive to personal data being used (71%), stored (56%) and shared with third parties (64%) in different ways.

• China has few regulations on protecting user data while Chinese users are more aware of crisis than global users who are moderate in the use of their personal information due to the protection of personal information.

Figure 19 : Attitude of Chinese and global users towards their personal data being used
Companies are going through a trust crisis due to their application of users’ mobile phone data

- Chinese and global users show a distrust in companies and third parties. Over 70% of Chinese and global users believe companies use and provide their personal information for third parties.
- Companies collect consumer information and provide for others driven by economic interests, leading to frequent user information leakage events and spam message and online fraud, and therefore attracting consumers’ attention on companies’ leakage of information.
- In the Internet of Things world, data related to user information and time are mined by companies as a resource to explore user demands to the largest extent. Currently, most companies do not properly maintain user data, causing user data to be stolen by the Internet gray and dark data industry for fraud, theft and sold to third parties.
- Companies’ collection of user information on mobile ends should be restricted within required services; companies should avoid purchasing or selling users’ personal information for precise marketing and profits, optimize user service agreements and improve agreement transparency.
- Administrative agencies should introduce regulations on excessive collection, illegal access and selling user information and improve the legal system related to China’s cybersecurity.

Figure 20: Do consumers think companies use their personal information?

<table>
<thead>
<tr>
<th></th>
<th>China:</th>
<th>Global:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t know</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>No</td>
<td>7%</td>
<td>15%</td>
</tr>
<tr>
<td>Yes, anytime</td>
<td>31%</td>
<td>23%</td>
</tr>
<tr>
<td>Yes, sometimes</td>
<td>46%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Figure 21: Do consumers think companies provide their personal information for third parties?

<table>
<thead>
<tr>
<th></th>
<th>China:</th>
<th>Global:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t know</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>No</td>
<td>16%</td>
<td>23%</td>
</tr>
<tr>
<td>Yes, anytime</td>
<td>12%</td>
<td>15%</td>
</tr>
<tr>
<td>Yes, sometimes</td>
<td>58%</td>
<td>57%</td>
</tr>
</tbody>
</table>

Note: inner cycle for global, outer cycle for China
Online shopping and health data of Chinese users are leaked more seriously than the global average:

- In general, Chinese users believe the categories of their personal information leaked are more than global users and the degree of leakage is also much higher. Contacts leakage ranks top 3 among global users’ information leakage and is higher than China. In contrast, the degrees of leakage of Chinese users’ personal information in consumption (28%) and health are higher than the global average.
- China has few limitations on using personal data related to health and consumption, while other countries have introduced strict laws and regulations on protecting health and other personal data, such as EU’s General Data Protection Regulation.

Figure 22: Comparison of information leakage from mobile phones of Chinese and global users.
Authors

**William Chou**
Technology, Media and Telecommunications Industry Leader
Technology Sector Leader
Tel: +86 10 8520 7102
Email: wilchou@deloitte.com.cn

**Taylor Lam**
Telecommunications, Media and Entertainment Sector Leader
Technology, Media and Telecommunications Industry Audit Leader
Tel: +86 10 8520 7126
Email: talam@deloitte.com.cn

**Roger Chung**
Technology, Media and Telecommunications Industry Research Senior Manager
Tel: +86 21 2316 6657
Email: rochung@deloitte.com.cn

**Lisa Zhou**
Technology, Media and Telecommunications Industry Manager
Tel: +86 10 8512 5909
Email: liyzhou@deloitte.com.cn

**Lavender Li**
Technology, Media and Telecommunications Industry Specialist
Tel: +86 23 8969 2507
Email: lavli@deloitte.com.cn
## Office locations

### Beijing
8/F Tower W2
The Towers, Beijing Oriental Plaza
1 East Chang An Avenue
Beijing 100738, PRC
Tel: +86 10 8520 7788
Fax: +86 10 8518 1218

### Changsha
20/F Tower 3, HC International Plaza
No. 109 Furong Road North
Kaifu District
Changsha 410008, PRC
Tel: +86 731 8522 8790
Fax: +86 731 8522 8230

### Changdu
Unit 3406, 34/F
Yanlord Landmark Office Tower
No. 1 Section 2, Renmin South Road
Chengdu 610016, PRC
Tel: +86 28 6789 8188
Fax: +86 28 6500 5161

### Chongqing
43/F World Financial Center, 188 Minzu Road, Yuzhong District, Chongqing 400010, PRC
Tel: +86 23 8823 1888
Fax: +86 23 8857 0978

### Dalian
15/F Senmao Building
147 Zhongshan Road
Dalian 116023, PRC
Tel: +86 411 8371 2888
Fax: +86 411 8360 3297

### Guangzhou
26/F Yuexiu Financial Tower
28 Pearl River East Road
Guangzhou 510623, PRC
Tel: +86 20 8396 9228
Fax: +86 20 3888 0121

### Hangzhou
Room 1206-1210
East Building, Central Plaza
No.9 Feiyunjiang Road
Hangzhou 310000, PRC
Tel: +86 571 8797 7688
Fax: +86 571 8779 7915 / 8779 7916

### Harbin
Room 1618, Development Zone Mansion
368 Changjiang Road
Nangang District
Harbin 150090, PRC
Tel: +86 451 8586 0060
Fax: +86 451 8586 0056

### Hefei
Room 1201 Tower A
Hua Bang ICC Building
No.190 Qian Shan Road
Government and Cultural New Development District
Hefei 230601, PRC
Tel: +86 551 6585 5927
Fax: +86 551 6585 5687

### Hong Kong
35/F One Pacific Place
88 Queensway
Hong Kong
Tel: +852 2852 1600
Fax: +852 2541 1911

### Jinan
Units 2802-2804, 28/F
China Overseas Plaza Office
No. 6636, 2nd Ring South Road
Shizhong District
Jinan 250000, PRC
Tel: +86 531 8973 5800
Fax: +86 531 8973 5811

### Macau
19/F The Macau Square Apartment H-N
43-53A Av. do Infante D. Henrique
Macau
Tel: +853 2871 2998
Fax: +853 2871 3033

### Mongolia
15/F, ICC Tower, Jamijan-Gun Street
1st Khoroo, Sukhbaatar District, 14240-0025 Ulaanbaatar, Mongolia
Tel: +976 7010 0450
Fax: +976 7013 0450

### Nanjing
6/F Asia Pacific Tower
2 Hanzhong Road
Xinjiekou Square
Nanjing 210005, PRC
Tel: +86 25 5790 8880
Fax: +86 25 8691 8776

### Shanghai
30/F Bund Center
222 Yan An Road East
Shanghai 200002, PRC
Tel: +86 21 6141 8888
Fax: +86 21 6335 0003

### Shenyang
Unit 3605-3606, Forum 66 Office Tower 1
No. 1-1 Qingnian Avenue
Shenhe District
Shenyang 110063, PRC
Tel: +86 24 6785 4068
Fax: +86 24 6785 4067

### Shenzhen
13/F China Resources Building
5001 Shennan Road East
Shenzhen 518010, PRC
Tel: +86 755 8246 3255
Fax: +86 755 8246 3186

### Suzhou
23/F Building 1
Global Wealth Square
88 Su Hui Road, Industrial Park
Suzhou 215021, PRC
Tel: +86 512 6289 1238
Fax: +86 512 6762 3338 / 3318

### Tianjin
45/F Metropolitan Tower
183 Nanjing Road
Hepping District
Tianjin 300051, PRC
Tel: +86 22 2320 6688
Fax: +86 22 8312 6099

### Wuhan
Unit 1, 49/F
New World International Trade Tower
568 Jianshe Avenue
Wuhan 430000, PRC
Tel: +86 27 8526 6618
Fax: +86 27 8526 7032

### Xiamen
Unit E, 26/F International Plaza
8 Lujiang Road, Siming District
Xiamen 361001, PRC
Tel: +86 592 2107 298
Fax: +86 592 2107 259

### Xi’an
Room 5104A, 51/F Block A
Greenland Center
9 Jinye Road, High-tech Zone
Xi’an 710065, PRC
Tel: +86 29 8114 0201
Fax: +86 29 8114 0205
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