Competitiveness of Social Media Platforms

—A Case Study of Xiaohongshu

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Abstract: The advent of social media platforms has profoundly altered human existence. People can interact anytime and anywhere thanks to various social media platforms, which not only enhances people's free time but also opens up job chances for an increasing number of people. Social media apps occupy a significant portion of people's time, and people often use these platforms to enrich their lives. This paper takes Xiaohongshu as an example to elaborate on its development trajectory, platform functions, and audience groups, analyze its core competitiveness, and finally compare Xiaohongshu with Weibo and TikTok in terms of user data, monthly active users (MAUs), product recommendation efficiency, and content. Through this study, it is evident that while Xiaohongshu may not be the most mainstream social media platform, its unique search model enables more accurate content delivery to users. Hence, Xiaohongshu is currently in a developmental phase with a rapidly increasing user growth rate.

Keywords: Social media platforms, Core competitiveness, Comparative analysis

1. Introduction

The emergence of social media platforms has had a significant impact on human life [1-3]. Different social media platforms allow people to communicate anytime and anywhere, which not only enriches their leisure time but also provides employment opportunities for more and more people [4, 5]. Nowadays, there are many mainstream social media platforms such as WeChat, TikTok and Tencent, as shown in Table 1.

Table 1: Downloads of Mainstream Software (Huawei AppGallery)

Social	Downloads
1. TikTok	48.2billion times
2. AAuto Quicker	31.8billion times
3. Micro Blog	22.1 billion times
4. Tencent Video	21.3 billion times
5. WeChat	19.8billion times
6. Little Red Book	17.2billion times

TikTok primarily focuses on entertainment videos to attract a wider user base [6]. Users can like and comment on videos that interest them, and these interactive features help bridge the gap between creators and viewers. There is also a small portion of users on this platform who engage in live streaming to promote and sell products. The functionalities offered by TikTok attract a diverse age group of users. The main users are teenagers and middle-aged people. This group of users often experiences high work-related stress and turns to social media platforms for relaxation. Coincidentally, the short videos on TikTok provide joy to users, and there are also internet trends and catchphrases that help users stay up to date with the latest trends.

Weibo often features a plethora of current affairs news, the release of trending events, and its "hot search" list allows users to stay informed about significant happenings in different regions, as well as various entertainment highlights and celebrity updates in real time [7]. In Weibo, user can find a wealth of content, including sports videos, news coverage, entertainment, and much more. This social media platform primarily caters to a younger audience, fans of celebrities, and official accounts where people can access the latest news. Users can express their opinions on hot topics and share their own lives on Weibo as well. Fans of celebrities can use Weibo to follow their favorite stars' accounts.

Tencent Video's primary focus is on long-form videos, offering users a vast library of movies, variety shows, and TV series. Users can enhance their viewing experience by purchasing memberships to access full-length content and enjoy high-definition visuals. Tencent Video focuses on young people. Most users are from the "post-90s" generation (born in the 1990s). Because young people tend to follow trending TV shows and series, Tencent Video serves as an excellent platform for this demographic.

WeChat's primary function is communication. Users can engage in audio and video chats with friends and create group chats. Furthermore, WeChat's Moments feature allows users to share their daily lives with friends, while WeChat mini programs offer various functions to make people's lives more convenient. WeChat has a broad and diverse user base, and many companies and schools choose to establish group chats within WeChat due to its high level of privacy protection.

The primary function of Xiaohongshu is for people to share short videos about their daily lives. In Xiaohongshu, most of the content consists of original videos made by content creators, with a primary focus on sharing. The platform features a wealth of videos related to beauty, fashion, and shopping. Hence, most users on Xiaohongshu are female. Moreover, Xiaohongshu has a unique search feature that allows users to discover more videos that match their preferences.

Xiaohongshu features a diverse range of content, including various original videos themed with, for example, fashion, beauty, and more [8-10]. Furthermore, Xiaohongshu plays a supportive role in everyday life by addressing practical matters and serves as a trendsetter, guiding the latest trends. The aim of this study is to help more people understand and use Xiaohongshu. In conclusion, the research findings suggest that while Xiaohongshu may not be a mainstream social media platform now, it is on an upward trajectory with an increasing number of users.

2.   Analysis of the Characteristics of Xiaohongshu

2.1. The Audience Group of Xiaohongshu

According to big data statistics, most users on the Xiaohongshu platform are female, but there is an ongoing transformation in the community's user composition. The male user ratio has increased from single digits to 30%, and the community is continually generating new content trends. Both content and user growth are still ongoing. Among them, the post-90s and post-95s are the most active user groups. Data disclosed at the 2022 Xiaohongshu Business Ecosystem Conference reveals that the platform currently has 200 million monthly active users, with 72% of them being from the post-90s generation. Users from first- and second-tier cities make up 50% of the user base, and the number of

content creators has surpassed 43 million. With the diversification of content, the proportion of male users has risen to 30%. Data from iiMedia Research indicates that in 2023, over 80% of Chinese Xiaohongshu users reported using the platform daily, with over 50% of users indicating that they use Xiaohongshu multiple times a day. Users use Xiaohongshu frequently, making the community platform highly active daily (Figure 1).
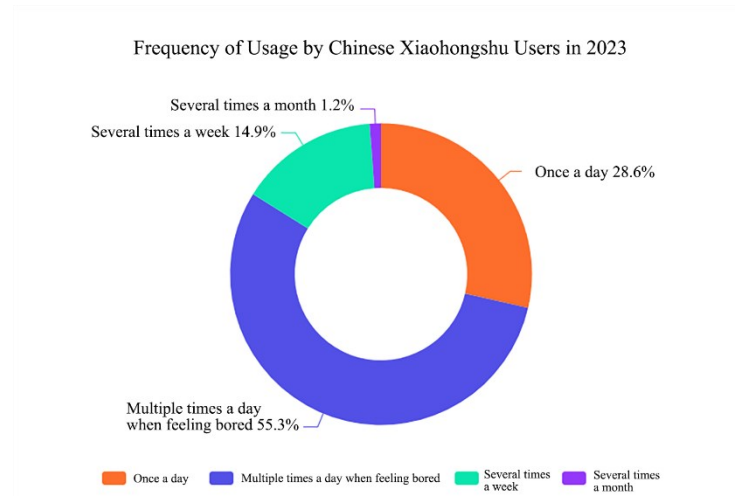

Figure 1: The Usage Frequency of Xiaohongshu Users in China in 2023

According to data from iiMedia Research in 2023, among Xiaohongshu users in China of different genders, female users primarily focus on information related to beauty makeup and skincare, losing weight and health preservation, and beauty and haircare. On the other hand, male users primarily focus on information related to skill development, travel guides, and sports and fitness. Most users on the Xiaohongshu platform are female, but there is an ongoing transformation in the community's user composition. The community is continually generating new content trends.

2.2. Three Sections of Xiaohongshu

Xiaohongshu consists of three major sections: Community, Enterprise Accounts, and Welfare Club. The Community module operates on a user-generated content (UGC) model, where young people record and share various aspects of their lives, including their shopping experiences and other aspects of a better life, using text, images, videos, and more. The content spans a wide range of life's domains. Each day, the community notes garner more than 8 billion reads. The platform collects data on users' lifestyle habits and related information. Through extensive data analysis and calculations, it achieves precise and efficient matching between notes and users, ultimately boosting users' purchasing desires. Reasons Why Chinese Xiaohongshu Users Trust the Platform According to data from iiMedia Research in 2023, regarding the reasons why Xiaohongshu users in China trust the platform's recommended content, 72% of users cite the high quality of Xiaohongshu's visual and textual content, 59.2% of users appreciate the comprehensive and detailed product recommendations on Xiaohongshu, and 51.9% of users find Xiaohongshu's product reviews to be authentic and trustworthy. From the analysis of users' trust in recommended content, we can roughly see a good operation ecology within Xiaohongshu. When most people consume others' life experiences on Xiaohongshu and refer to sharing content about shopping, games, and gastronomy, new content producers will also publish more high-quality content according to the standards of this community, thus forming a virtuous circle.

3. Analysis of Core Competitiveness of Xiaohongshu

3.1. A Platform for Concentration of High-net-worth Users

Among the more than 260 million monthly active users of the platform, 70% are post-90s generation, and half are distributed in tier 1-2 cities. Behind these data, a clear and typical image of Xiaohongshu consumers has emerged: highly educated and high-income urban young people. They love life and live with good taste and have certain purchasing power—" more attention and interaction in such fields as fashion, beauty, lifestyle".

3.2. Positioned as an Open Community

In the era of self-media, information transmission is convenient and fast. By building a UGC sharing community, many users who like to record their lives have been quickly attracted. By tapping into women's natural inclination for sharing, the platform harnesses their enthusiasm for exploration and converts it into shared notes, including using tips and recommendation notes, as well as those for various fields such as clothing, makeup, and tourism. Xiaohongshu offers more than just excellent word-of-mouth resources; its reputation is rapidly growing and spreading, allowing users to discover and learn more about various brands, products, and services. All notes in the community are created by users, ensuring that product highlights and word-of-mouth are shared without excessive commercial recommendations. When unsure about what to buy or what suits them best, users can turn to Xiaohongshu to find solutions to their shopping dilemmas. The longer users engage with Xiaohongshu, the easier it becomes for them to find products that match their preferences. This not only increases user loyalty but also greatly stimulates their desire to shop. (Currently, Xiaohongshu's e-commerce platform adds over 200,000 notes daily. As users explore the community, they not only enjoy the shopping experience but also engage in sharing and interaction, which further fuels their enjoyment and enthusiasm to contribute their own notes, enhancing the community's activity and promoting greater user engagement. Users on Xiaohongshu are not only consumers; they also become promoters.)

3.3. Full-category Independent Service Functions

During the initial registration process on Xiaohongshu, users are required to select their interest tags, like travel, makeup, fitness, and men's clothing. By integrating these tags into the platform, Xiaohongshu integrates content created by users according to these tags, providing different groups of people with opportunities to discover one another and enabling space for users to freely express their personal opinions and ideas. Users' words, suggestions, and experiences are completely based on their own preferences. As original content of users, they make consumers more confident in the authenticity of the content pushed by posts and establish a good reputation among users who also like or yearn for certain products. Word-of-mouth communication greatly improves the communication effect and enhances user stickiness. Xiaohongshu has built an independent service function for users. Users can independently search all kinds of posts, find what they need and like, and then complete the processes such as ordering, payment, and after-sales on the Welfare Club. Through continuous optimization and improvement of the platform process and page, the efficiency of independent services is improved as much as possible. Based on the data collected by the platform and according to users' search and purchase records, Xiaohongshu can establish user profiles, determine user characteristics, recommend products to users in a targeted manner, and recommend specific products to users matched, thereby improving user experience and further consolidate customer relationships.

3.4. Original Short Videos of Social Networking and Lifestyle

The original short videos shared by users in Xiaohongshu have made social networking a success because there are many videos in Xiaohongshu. Therefore, social functions only account for a small proportion of Xiaohongshu. Only comments and followers can chat with each other. Besides, Xiaohongshu entered the market in the form of short videos. Therefore, it is the short videos shared by users that complete the current social function. I think the two have a very close relationship. If Xiaohongshu loses the sharing of lifestyle short videos one day, no number of social media platforms can be used. Since there is no video in the content, users who want to express their opinions in the comments cannot communicate with the content. If there is no comment function, people can't make their own suggestions, and there will be no likes and followers. As a result, creators who share original videos lose their incentive to post. Gradually, the social media platform will fade out of public view. Therefore, this paper believes that there is a very close relationship between social networking and lifestyle short videos shared by users.

3.5. Rich and Detailed Recommendation Contents

Although Xiaohongshu is an information-sharing platform, users focus on sharing high-quality recommendation posts for reasons such as other people's or social identity, unlike general search engines that have all kinds of low-quality and useless information. Therefore, users will carefully study and collect all kinds of information before producing posts. Trying to achieve professional post-output requires a certain level of education as the basis. Therefore, most users participating in Xiaohongshu's "recommendation" behavior are highly educated scholars with generally high education backgrounds.

4. Analysis of Xiaohongshu and Similar Social Media Platforms

4.1. Comparative Analysis of Xiaohongshu and Other Social Media Platforms

(1) User data

Both Weibo and Xiaohongshu contribute over 50% of female users, with 99% using Xiaohongshu. In terms of the Target Group Index, there is little difference between Weibo and Xiaohongshu in the population aged 26-35, who constitute the main force in the current consumer market.

The proportion of male and female on TikTok is roughly the same, but its proportion of female is far lower than that in Xiaohongshu. In terms of age distribution, the number of people aged 19-30 in TikTok is much fewer than that in Xiaohongshu. TikTok is targeted at young people and focuses on entertainment and advertising, mainly consisting of the post-90s, post-95s and post-00s generations.

TikTok: The core users are aged 18-40, among which the post-90s generation accounts for 50% and female users account for 51%; they are distributed in tier 1-4 cities, mainly in Guangdong, Jiangsu and Shandong provinces.

Xiaohongshu: The core users are aged 16-34, among which the post-90s generation accounts for 70%. Most of them are female users, accounting for 70%; they are distributed in tier 1-2 cities, mainly in Shenzhen, Shanghai and Beijing, as shown in Table 2.

Table 2: User Characteristics Analysis.

			TGI of Users on Each Platform			
					Aged 26-30	
Micro Blog	45%	55%	149	172	175	156
WeChat	56%	44%	100	101	101	101
TikTok	52%	48%	105	106	108	112
Kwai	59%	41%	117	59	88	109
bilibili	61%	39%	156	189	154	136
Xiaohongshu	31%	69%	128	156	171	155
Zhihu	54.89%	45.11%	Data source: China KOL Marketing Trend Report 2023 by Weiboyi			

(2) Monthly active user scale.

Table 3: Monthly User Activity.

Platform	WeChat	TikTok	Weibo	Kwai	Bilibili	Xiaohongshu	Zhihu
Monthly active users	1.2 billion	680 million	582 million	390 million	294 million	200 million	102 million

Weibo has nearly three times as many monthly active users as Xiaohongshu. As Xiaohongshu is still in the development stage, its users are growing relatively fast, as shown in Table 3.

TikTok has three times as many monthly active users as Xiaohongshu.

(3) Contents

To release short videos on TikTok, one need not be a creator, and the platform has certain characteristics of dissemination and flow rate attraction. Therefore, while many uploaded videos are of vulgar taste, such fun and entertainment generate jobs by creation.

On the contrary, most of the contents and forms in Xiaohongshu are about personal original life aesthetics, clothing matching, gastronomy and travel sharing, which should provide emotional experiences with high quality. Hence, users often offer high-quality material information through a series of evaluations, tests, comparisons and trials. Therefore, Xiaohongshu's high-quality content can attract long-tail traffic and deliver more long-term results.

Compared with TikTok, users of Xiaohongshu prefer search. The large number of users using Xiaohongshu embrace specific goals (such as checking various tutorials or fitness), rather than lounging around for entertainment like those in TikTok. It is precisely because users like to search contents for consumption that Xiaohongshu's posts have a profound impact. Compared with the sudden rise of TikTok, Xiaohongshu's hit posts have seen a relatively slow but continuous increase in likes, but the life cycle of content is very long. A popular content can be liked for a month at a high frequency and for six months at a low frequency.

5.　Other advantages of Xiaohongshu

50 questionnaires were released to investigate students' understanding and use frequency of Xiaohongshu (Table 4).

Table 4: questionnaire results

Item	Options	Counts	Frequency (%)
1. Do you use Xiaohongshu?	Yes	39	78
	No	11	22
2. What factors do you value when choosing Xiaohongshu APP?	Richness of functions	12	24
	Software page design	9	18
	Software advertising	6	12
	Entertainment	10	20
	Practicality	11	22
	User comments	2	4
3. Why do you use Xiaohongshu?	Share your good stuff	8	16
	Browse posts to improve knowledge	8	16
	Purchase useful goods and avoid making wrong choices	7	14
	Watch videos of bloggers recommending products	6	12
	Watch short videos	10	20
	Kill time	11	22
4. What are you interested in about Xiaohongshu?	Beauty makeup and skincare	9	18
	Tourist attractions	11	22
	Delicacy recommendation	12	24
	Clothing matching	10	20
	Fitness and dance	8	16
5. How often do you use Xiaohongshu?	Frequently	20	40
	Occasionally	9	18
	Not commonly used	2	4
	Almost every day	19	38

6. Conclusion

Nowadays, social media has been used widely. They enable people to get in touch with others whenever and wherever they want, enhance interpersonal communication and broaden the social circle. Xiaohongshu has a unique search mode and implements full-category automated service functions, which has greatly increased its user volume. In general, XiaoHongshu is not the mainstream software at present, but because XiaoHongshu has a special search function that can accurately push, and the short video is of high quality, more and more people will use this social software at the development stage.

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