

Confidential

Data Intelligence Application Software Market in China Independent Industry Report

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For and on behalf of
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Overview of Data Intelligence Application Software Market in China

Definition and Classification of Data Intelligence Application Software



Definition of Data Intelligence Application Software

- Artificial general intelligence refers to a stage of AI development where it can exhibit human-like intelligence across different environments and fields through its broad cognitive and decision-making abilities. In the context of future developments in general AI, data, generative AI models, and industry knowledge are the key factors for companies to gain a competitive advantage. Companies can leverage data intelligence application software to capitalize unique data value accumulated during their operations, which in turn can be integrated with the capabilities of generative AI, and an understanding of specific industries to create data-driven workflows. This approach optimizes operational efficiency in vertical application scenarios and helps businesses enhance customer experience.
- Data intelligence application software utilizes technologies such as artificial intelligence, big data, cloud computing, and IoT to help clients extract value from their data, providing scenario-specific data intelligence capabilities in various contexts including marketing and operations, empowering enterprises to achieve data-driven decision-making processes as well as cost reduction and efficiency improvement in operations management.



Classification of Data Intelligence Application Software

- Data intelligence application software can be used in different applications by organizations, primarily including marketing, operation, and others.



Marketing Data Intelligence Application Software

➤ Refers to the application software that uses artificial intelligence, big data, and other technologies to solve the business needs of enterprises in marketing scenarios in different directions, including advertising monitoring, intelligent insights, intelligent placement of advertisements, etc., and to help enterprises achieve measurable, attributable and optimizable data-driven marketing campaigns, empowering the business growth of the application software.



Operational Data Intelligence Application Software

➤ Refers to the use of artificial intelligence, IoT, and other technologies to solve the enterprise customers in operation the different aspects of the operation of the scene on the people, goods, and field management needs, to help enterprises improve the operational efficiency, through the accurate management of the customer base, intelligent store management and inventory control, and optimize the use of space, to achieve the overall optimization of the operational process, so that enterprises can make more effective data-based operation management decision.

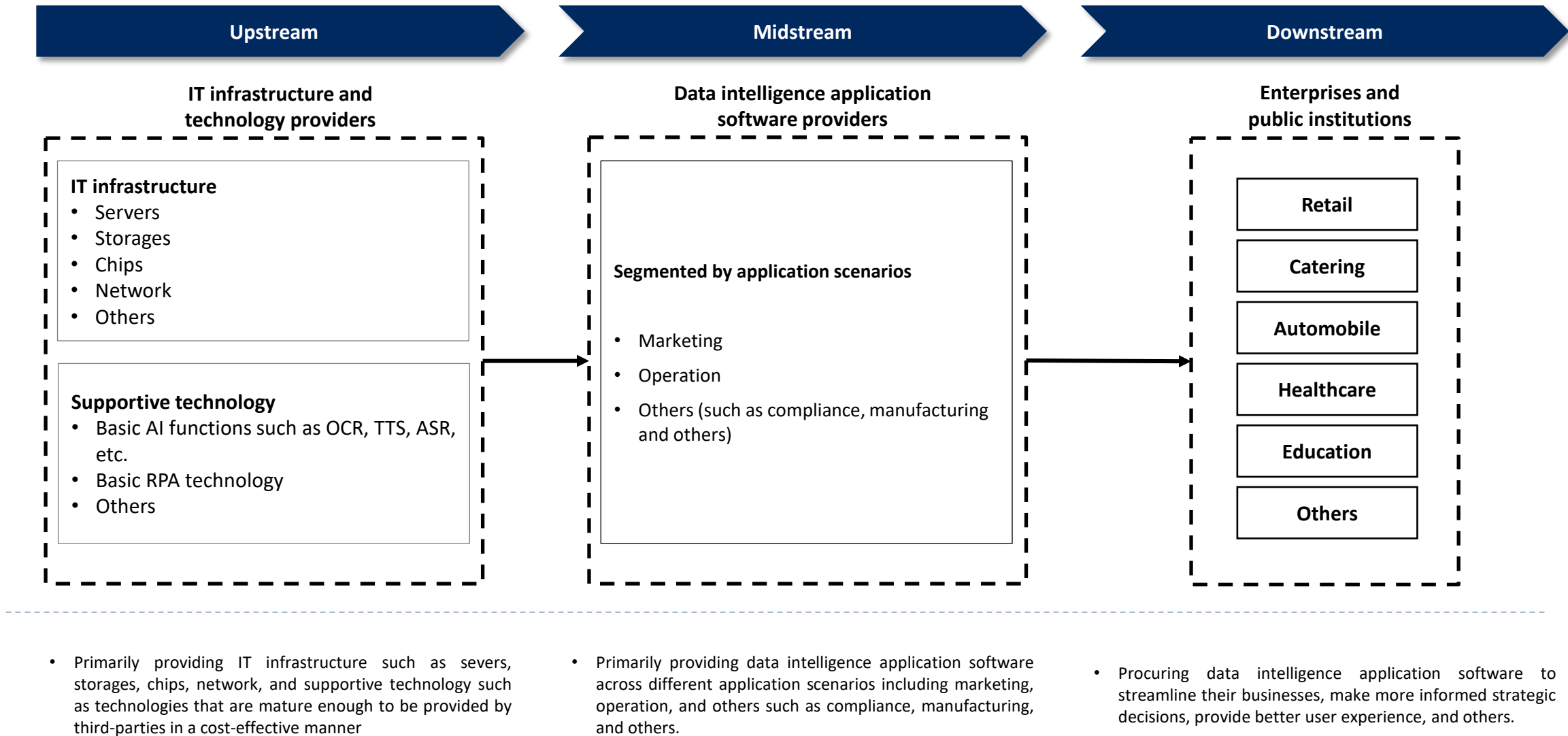


Others

➤ Include other parts of organizations' operation including supply chain management, financial and tax management, and among others.

Overview of Data Intelligence Application Software Market in China

Value Chain of Data Intelligence Application Software Market in China



Overview of Data Intelligence Application Software Market in China

Pain Points and Values of Data Intelligence Application Software

- In the evolving landscape of data utilization, enterprises have traditionally faced several critical challenges that hinder their ability to fully leverage data for business growth and may even lead to compliance issues.
- The unmet demand in vertical application scenarios reveals that specific industry needs often go unsatisfied by generic data solutions. These verticals require tailored approaches that can address unique challenges effectively. Data silos pose a significant barrier, particularly in large organizations where different departments use separate systems, leading to fragmented data storage. This separation makes it difficult to integrate and utilize data across the enterprise, limiting its value. the limited access to offline data channels further constrains businesses. Historically, data collection has focused primarily on online activities, leaving offline data underutilized due to challenges in capturing and integrating it with online data. The rise of IoT offers potential solutions, but integration remains complex. he neglect of data privacy is a growing concern. In the rush to harness data for competitive advantage, many organizations have overlooked the importance of safeguarding user privacy, leading to misuse or breaches that can damage trust and brand reputation.

1

Unmet demand in vertical application scenarios

- Despite the rapid advancements in general large models in recent years, the models are prone to problems such as hallucinations, inaccurate reasoning, and lack of effective integration with real business scenarios during their development. Based on the pain points demands of real business scenarios, accumulated vertical scenario-based data and technical capabilities, data intelligence application software helps enterprises to improve the accuracy and reliability of the outputs when leveraging capabilities of general large models.

2

Data silos

- In the process of business development, especially in large enterprises, different data are often stored in disparate systems used by different departments and data generated from online operations and offline operations are often segregated, leading to data silos. These isolated data repositories make it challenging to integrate and fully unleash data's value. Data intelligence application software helps enterprises overcome this challenge by integrating data from various sources, including both online sources and offline sources such as IoT devices, and managing it in a unified manner, thereby enhancing data accessibility and improving its utilization efficiency.

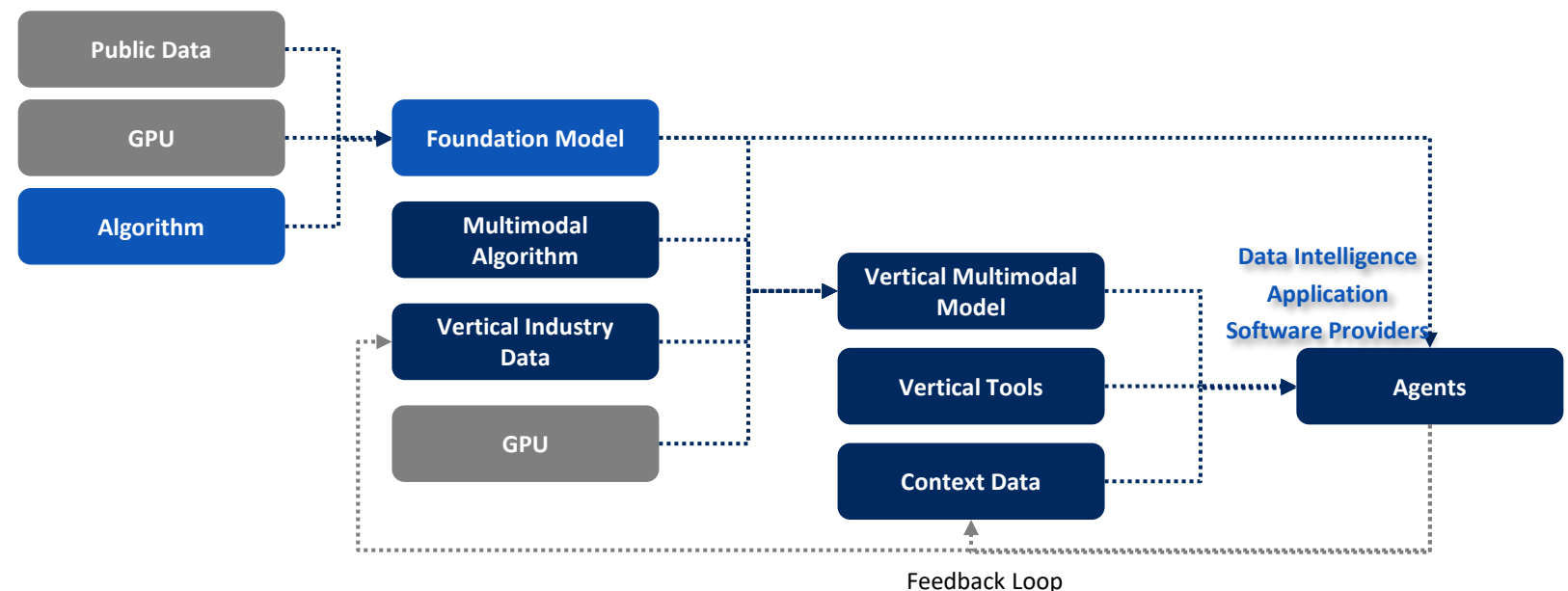
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Data ethics dilemmas

- With the rising importance of data, especially in the process of rolling out generative AI technologies, data ethics dilemmas are becoming more urgent. Data ethics refers a system of values and moral principles related to the responsible collection, use and sharing of data. For example, in the context of advertising placement, interest among participants including brands, advertising agencies, media platforms may not be aligned and may impair trust in the marketing placement process. Data intelligence application software is designed to alleviate the problem by helping clients better unlock the value of data while addressing data ethics dilemma.

Overview of Data Intelligence Application Software Market in China

Data Intelligence Application Software and GenAI



Key Findings

- Data intelligence application software providers play a critical role as generative AI technology increasingly advances. Leading AI companies specializing in foundation models leverage large-scale computing power and massive datasets to pre-train powerful models. Recently, leading foundation models such as DeepSeek have demonstrated that innovative training strategies can effectively reduce costs while maintaining outstanding performance. However, as foundation models are primarily designed for general-purpose use, they often face challenges in industry-specific applications, such as hallucinations and misalignment with real-world workflows.
- To bridge this gap, data intelligence application software providers play a crucial role in transforming the general capabilities of foundation models into reliable, specialized solutions for specific scenarios. With access to industry-specific data and the ability to process large-scale multimodal datasets, these providers enable companies to develop vertical multimodal models that enhance foundation models with greater accuracy and efficiency. Moreover, by leveraging domain expertise and continuous data feedback from application software, data intelligence software providers can further refine their models, ensuring better alignment with real-world use cases and maintaining a competitive edge.

Overview of Data Intelligence Application Software Market in China

Market Drivers of Data Intelligence Application Software Market

1	Enterprises' demand for data intelligence application software	As competition among enterprises intensifies, there is a growing enterprises' need for data-driven strategic and operational decisions in order to ensure long-term success in a competitive business environment. The rapid development of artificial intelligence, mobile internet, and IoT has led to the increasing complexity of data and the explosive growth of data volume, posing higher challenges for data-driven decision-making capabilities in various application scenarios. Data intelligence application software deeply integrates with various heterogeneous data sources, enhancing enterprises' data-driven decision-making capabilities. Looking forward, data will not only be the foundation for enterprise decision-making but will also become a crucial tool for enterprises to optimize production processes, improve efficiency, and reduce costs.
2	Proliferation of multimodal data	With the rapid development of mobile internet and IoT devices, multimodal data processing is becoming increasingly common and abundant. The complexity and heterogeneity of multimodal data has brought new challenges and opportunities for microdata processing and analysis. Companies need to leverage data intelligence application software to perform in-depth mining and integration analysis of multimodal data, enabling better utilization and exploitation of data value across different vertical application scenarios.
3	Development of technology	The continuous advancement of cutting-edge technologies such as AI, big data, cloud computing, and IoT provides crucial support for the development of data intelligence application software. Among these, artificial intelligence has been developed more significantly in recent years. With the development of large-scale pre-trained models including transformer and diffusion, AI technology is evolving from discriminative to generative techniques. Through pre-training on massive data sets, it has formed a powerful content understanding and generating capabilities, further expanding the application range and capabilities of data intelligence software and promoting continuous industry development under the wave of new technologies.
3	Favorable policies	In recent years, the Chinese government has vigorously promoted the development of the digital economy through a series of policy and measures, such as the "14th Five-Year Plan for Digital Economy Development" (《“十四五”數字經濟發展規劃》), the "Guidance Opinion on Strengthening Data Asset Management" (《關於加強數據資產管理的指導意見》) and the "Three-Year Action Plan for Data Factors (2024-2026)" (《“數據要素x”三年行動計劃 (2024 — 2026年)》). These policies aim to drive data assetization, strengthen national technological innovation capabilities under the digital economy, promote digital transformation across industries, and foster new economic growth points, thus expanding the market scale of data intelligence application software in China. Meanwhile, regulations such as the General Data Protection Regulation (GDPR) and China's Data Security Law and Personal Information Protection Law have redefined the responsibilities and obligations of enterprises in handling personal data, providing a healthy and sustainable development environment for China's data intelligence application software market.

Overview of Data Intelligence Application Software Market in China

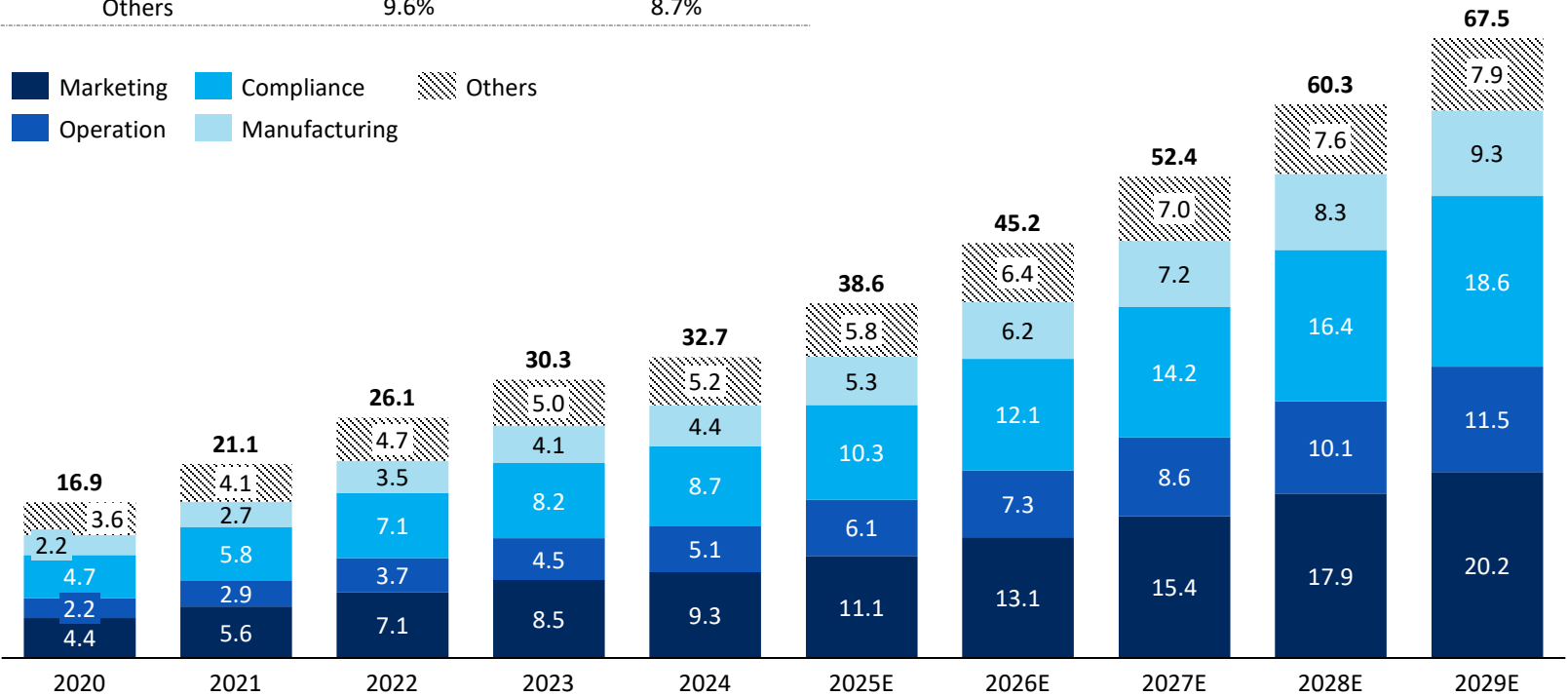
Market Size of Data Intelligence Application Software Market in China

Market size of data intelligence application software market in China

RMB Billion, 2020-2029E

CAGR	2020-2024	2024-2029E
Total	17.9%	15.6%
Marketing	20.6%	16.8%
Operation	23.4%	17.7%
Compliance	16.6%	16.4%
Manufacturing	18.9%	16.1%
Others	9.6%	8.7%

Marketing Compliance Others
Operation Manufacturing



Key Findings

- Market size of data intelligence application software market in China has increased from RMB16.9 billion in 2020 to RMB32.7 billion in 2024 with a CAGR of 17.9% from 2020 to 2024.
- Looking forward, market size of data intelligence application software market is expected to reach RMB67.5 billion in 2029 with a CAGR of 15.6% from 2024 to 2029.

Overview of Operational Data Intelligence Application Software Market in China

Key Trends of Operational Data Intelligence Application Software Market

 Increasing level of data complexity driving the increase in value of data intelligence application software	With the rapid development of IoT, AI, and big data technologies, the volumes of data have grown explosively, and the complexity of data has continually increased. Various sensors, smart devices, and internet applications continue to generate massive amounts of structured and unstructured multimodal data, increasing the complexity of data processing and analysis, and raising the requirements and demands for data intelligence application software.
 Further integration with large models	The development of large models is paving the way toward general AI and becoming one of the important production factors for enterprises in the future. More and more data intelligence application software providers will further integrate large model capabilities and applying them widely across different scenarios, including enterprise marketing and operations. As large model capabilities become more widespread and mature, the value of data in vertical scenarios is likely to increase. Data intelligence application software providers will continue to improve their data accumulation in industry verticals and their research and development capabilities for industry-specific large models, providing differentiated services to clients in various industries. Additionally, AI agents for various industry verticals will become important components of future workflows for both enterprises and individuals, connecting to different parts of the enterprise through APIs, and further helping to reduce costs and increase efficiency.
 Growing importance of data privacy and security	As data intelligence applications become more widespread, data privacy and security issues are becoming increasingly prominent. Governments and enterprises are placing greater emphasis on data protection regulations, and privacy-preserving technologies such as federated learning and blockchain are gradually becoming key technologies for data intelligence application software providers to ensure data security and privacy and are playing an increasingly important role.

Overview of Data Intelligence Application Software Market in China

Favorable Policies of Data Intelligence Application Software Market

Policy Name	Issuing Authority	Issued Date	Key Contents
Several Policies to Encourage the Development of Software Industry and Integrated Circuit Industry 《鼓励软件产业和集成电路产业发展的若干政策》	State Council	2000.06.24	In order to promote the development of China's software industry and integrated circuit industry, enhance the innovation ability and international competitiveness of the information industry, drive the transformation of traditional industries and product upgrading, and further promote the sustained, rapid and healthy development of the national economy, we have formulated the relevant favorable policies in the areas of investment and financing, taxation, industrial technology, export, income distribution, talent attraction and cultivation, purchasing, recognition of software enterprises, intellectual property rights and so on.
Computer Software Protection Ordinance 《计算机软件保护条例》	State Council	2001.12.20	In order to protect the rights and interests of copyright holders of computer software, to adjust the interests and relations occurring in the development, dissemination and use of computer software, to encourage the development and application of computer software, and to promote the development of the software industry and the informatization of the national economy, these Regulations are formulated in accordance with the Copyright Law of the People's Republic of China.
Measures for the Management of Software Products 《软件产品管理办法》	Ministry of Industry and Information Technology	2009.03.05	In order to strengthen the management of software products and promote the development of China's software industry, these measures are formulated in accordance with the relevant national laws, administrative regulations and the State Council's Several Policies to Encourage the Development of Software Industry and Integrated Circuit Industry.
Several Policies to Further Encourage the Development of Software Industry and Integrated Circuit Industry 《进一步鼓励软件产业和集成电路产业发展的若干政策》	State Council	2011.01.08	In order to further optimize the development environment of the software industry, improve the quality and level of industrial development, and cultivate a number of industry-leading enterprises with strength and influence, a series of favorable policies on finance and taxation, investment and financing, research and development, import and export, talents, intellectual property rights, and market, etc., have been formulated.
Several Policies for Promoting the High-Quality Development of the Integrated Circuit Industry and the Software Industry in the New Era 《新时期促进集成电路产业和软件产业高质量发展的若干政策》	State Council	2020.07.27	In order to further optimize the environment for the development of software industry, deepen the international cooperation of the industry, and improve the industry's innovation ability and development quality, it has formulated favorable policies in the areas of finance and taxation, investment and financing, research and development, import and export, human resources, intellectual property rights, market application, international cooperation and so on.
Announcement on Enterprise Income Tax Policies for Promoting the High-Quality Development of the Integrated Circuit Industry and the Software Industry 《关于促进集成电路产业和软件产业高质量发展企业所得税政策的公告》	Ministry of Finance, Development and Reform Commission, Ministry of Industry and Information Technology	2020.12.11	Software enterprises encouraged by the government shall be exempted from enterprise income tax from the first to the second year from the profit-making year, and shall be subject to enterprise income tax at the statutory rate of 25% for the third to the fifth years. Key software enterprises encouraged by the government are exempted from enterprise income tax for the first to fifth years from the profit-making year, and enterprise income tax is levied at a reduced rate of 10% in the succeeding years.

Competitive Landscape of Data Intelligence Application Software Market in China

Ranking of Top Data Intelligence Application Software Providers

Ranking of Top Data Intelligence Application Software Providers in China			
Ranking	Company	Revenue of Data Intelligence Application Software (RMB Billion, 2024)	Market Share (%, 2024)
1	MiningLamp	1.3	3.8%
2	Company A	0.5	1.6%
3	Company B	0.5	1.5%

Notes:

- 1) Company A is a public company founded in 2014 and listed on the Hong Kong Stock Exchange, which primarily provides data intelligence application software solutions.
- 2) Company B is a private company founded in 2011, which primarily provides data intelligence solutions to enterprises in China.

Key Findings

- MiningLamp is the largest data intelligence application software providers in China in terms of revenue in 2024.
- MiningLamp is among the first companies in China to adopt AIoT, AIOps, and multimodal LLM technologies, providing support for IT and production equipment and system maintenance services.
- MiningLamp was one of the first companies in China’s data intelligence application software industry to obtain receive the Certificate for Data Security Management Capability.

Competitive Landscape of Data Intelligence Application Software Market in China

Key Success Factors of Data Intelligence Application Software Market

Key functions	Technologies that constitute competitive edges of the MiningLamp’s products and solutions
Marketing platform coverage	- Covers more than 100,000 media, forums, websites, and platforms, representing the broadest coverage in the market. The broadest coverage of media platforms ensures that the Company’s product can effectively meet a wide range of clients’ needs - Capable of maintaining a 99.7% accuracy rate⁽¹⁾ in marketing performance measurement when processing over 10 billion user behavior logs on a daily basis, positioning it as a leading data processing service provider in the market. This robust processing power ensures the reliability and high performance of the Company’s product, earning greater trust from clients - First to offer cross-device services across personal computers, mobile devices, and OTT platforms in China. This pioneering innovation enables the Company’s product to quickly address clients’ needs, securing a first-mover advantage in the market
Marketing content generation and performance measurement	- First to adopt multimodal large language model (MLLM) in 2023 to identify and generate diverse types of content that are predicted to lead to the best marketing performance. MLLM is applied in Miaozen Systems and not only helps enterprises identify the advertising contents that are likely to generate the best marketing performance but also helps them automatically generate diverse types of content that are predicted to lead to the best marketing performance - First to adopt hypergraph multimodal large language model (HMLLM) in 2024, allowing it to integrate various non-standard modalities such as EEG and eye movement and generate effective marketing content
Marketing channel selection	First to propose a face recognition method based on meta-learning (a machine learning technology) in 2019 to enhance influencer identification and effectively help brands select the influencers that have the potential to generate the best advertising performance results
Market insights generation	First to adopt hypergraph retrieval-augmented generation (HRAG), in 2023 to efficiently retrieve and connect more diverse data types, offering more precise analyses and richer insights, enabling enterprises to analyze a wide range of variables—including text, images, speech, and videos—through a customer data management platform, providing them with even deeper, more comprehensive insights for content creation and decision-making
Sales strategy optimization	First to harness knowledge graph technologies in 2019 to develop conversational intelligence products that assist frontline sales personnel
Proactive store equipment maintenance and inventory management optimization	First to incorporate the concepts of “events,” “time,” and “space” to knowledge graph modeling in 2022 to help businesses in proactive maintenance and data-driven decision-making through dynamically linking extensive data sets such as equipment performance data and drawing correlations between factors in the supply chain management such as delivery time, order accuracy, and the quality of goods supplied

Notes: 1) Measured by an IT performance monitoring SaaS product, which monitors website quality such as safety, API interfaces, and webpage functionality and performance, offered by an independent third party. Specifically, the accuracy rate represents the number of tracking requests with proper collection of accurate data as a percentage of the total number of tracking requests. Tracking requests are requests sent by an application or a web browser to Miaozen Systems for tracking an Internet user’s behavior, such as views, clicks and searches, in relation to an advertisement. Should Miaozen Systems encounters any downtime or interruptions, the accuracy of the report would be affected. For example, if an advertising campaign has one billion tracking requests, and ten thousand requests are not correctly recorded due to server timeouts, the accuracy rate is calculated as a percentage, representing the difference between the one billion requests minus the ten thousand requests not correctly record, divided by the one billion requests.

Competitive Landscape of Data Intelligence Application Software Market in China

Key Success Factors of Data Intelligence Application Software Market

Key Success Factors

Leading Technological R&D and Innovation Capabilities

- With the continuous development of big data, AI, and cloud computing technologies, enterprises need to consistently invest in R&D and innovation to maintain a competitive edge. Advanced technological R&D capabilities not only help enterprises launch products with more powerful functionalities but also enable them to respond quickly to market changes and customer needs. Enterprises need to combine their vertical scenario-based data with large model capabilities to better handle complex data analysis and processing tasks in vertical applications, thereby creating new business opportunities and forming competitive advantages.

Profound Industry-Specific Know-How

- Profound industry-specific know-how is another key factor for success in the data intelligence application software market. Each industry has its unique business processes and data requirements. Understanding the operational models and market trends of specific industries and developing targeted software products to address the real pain points of downstream customers in practical business scenarios is crucial for data intelligence application software providers.

Continuous Acquisition of High-Quality Industry Data

- Continuously acquiring large amounts of high-quality industry data is one of the important foundations for data intelligence application software providers to consistently provide high-value products to clients. Enterprises need to utilize various types of interfaces to obtain vast amounts of high-quality data and continuously train and optimize vertical industry large models, thereby enhancing the actual value delivered to clients.

Widely-recognized Brand and Industry Benchmarking Cases

- In the highly competitive data intelligence application software market, widely recognized brands and benchmarking cases of client service are also important factors for success. A brand's awareness and reputation can help attract more potential clients and enhance the loyalty of existing clients. At the same time, potential clients often consider whether a provider has served well-known enterprises in the industry or has created benchmarking cases as important criteria for choosing partners.

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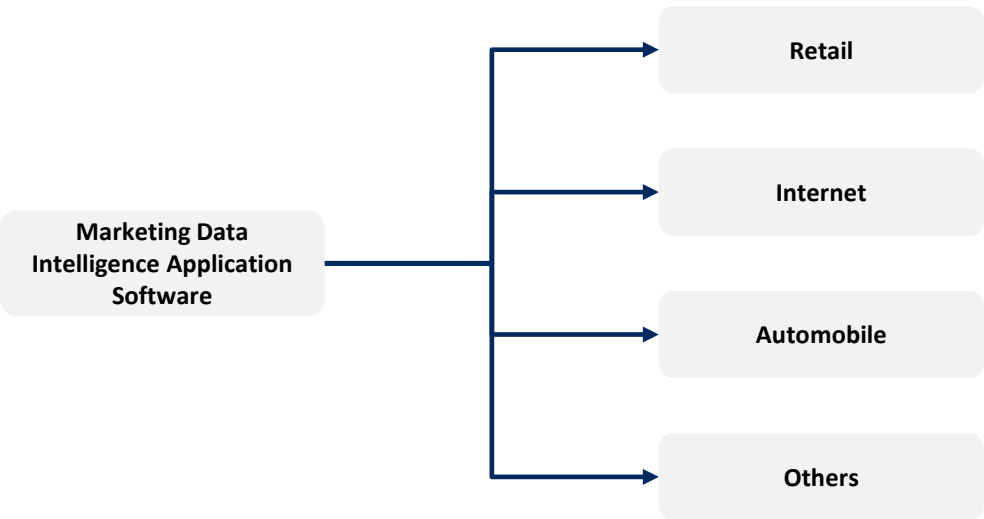
Definition and Classification of Marketing Data Intelligence Application Software

Definition of Marketing Data Intelligence Application Software

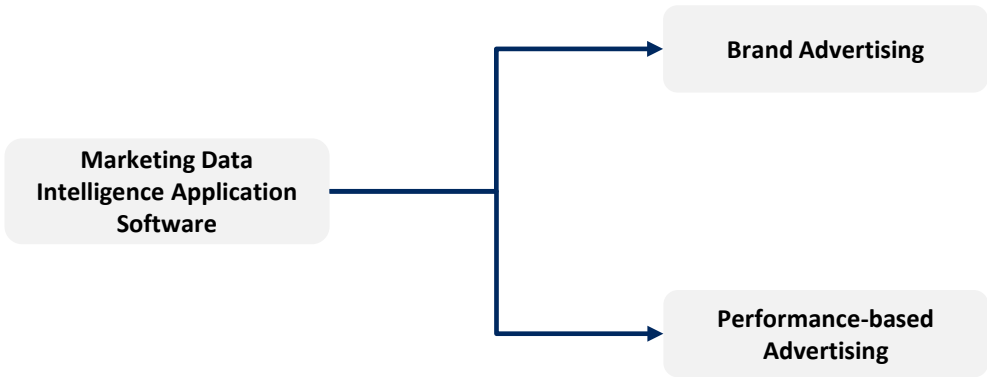
- In the current context of global commodity supply exceeding its demand, the importance of marketing in the overall business environment has become increasingly prominent. Marketing is no longer just an auxiliary means of product sales, but one of the core forces driving the sustainable development of enterprises. Enterprises in an increasingly competitive market environment need to implement data-driven analytics strategies through effective marketing tools in order to stand out, attract more potential clients and transform to sales growth.
- Marketing intelligence application software refers to the application software that uses artificial intelligence, big data, and other technologies to solve the business needs of enterprises in marketing scenarios in different aspects, including intelligent insights, intelligent placement of advertisements, advertising monitoring, and others, and to help enterprises achieve measurable, attributable and optimizable data-driven marketing campaigns, empowering enterprise business growth.

Classification of Marketing Data Intelligence Application Software

Based on downstream customer industries



Based on the type of advertising



Overview of Marketing Data Intelligence Application Software Market in China

Pain Points and Values of Marketing Data Intelligence Application Software

- In today's digital age, businesses often face following challenges and pain points when doing marketing. Using marketing data intelligence application software to analyze and process large amounts of customer data can help companies accurately identify their target markets and consumer needs.
- Marketing data intelligence application software utilizes advanced algorithms and machine learning technologies to help companies improve marketing efficiency and effectiveness and bring data-driven marketing decision support, making it an indispensable marketing partner for modern enterprises.

1

Difficulty in evaluating the effectiveness of marketing campaigns

- Enterprises need to evaluate the effectiveness of their marketing campaigns on media platforms based on data from their advertising campaigns. However, analyzing the effectiveness of marketing campaigns is challenging due to the difficulty and complexity of obtaining relevant data. Marketing data intelligence application software collects and analyzes different types of data to help enterprises evaluate the effectiveness of their marketing campaigns across all major media platforms, pinpoint valuable consumer feedback, gain insights into evolving industry and consumer trends, and refine their brand strategies.

2

Difficulty in rationalizing budget allocation across different media channels and marketing campaigns

- Enterprises need to plan and allocate budgets for different media channels and marketing campaigns based on the ROI (Return on Investment), but the fragmentation of data between marketing platforms makes it complicated to measure the ROI. Meanwhile, as the importance of KOL (key opinion leader) in the process of marketing campaigns continues to increase, media platforms usually lack the prediction of the economic value brought by different KOLs on social media platforms, which makes it difficult for enterprises to determine the optimal budget allocation ratio for various media channels and marketing campaigns. Marketing data intelligence application software can help enterprises plan better and allocate their budgets across various media channels and KOL by instantly monitoring multi-channel ad traffic to get a more realistic and accurate ROI.

3

Difficulty in developing marketing plans

- Enterprises often lack an in-depth understanding of target markets, consumer behavior and competitors, resulting in marketing strategies that may not match market demand. Marketing data intelligence application software can help enterprises design more targeted marketing strategies by integrating user data from multiple media platform sources, covering different channels and analyzing specific customer behaviors.

4

Difficulty in efficiently producing quality marketing content

- With the rapid development of social media-based marketing in China's market, it is difficult for most enterprises, especially non-local enterprises, to efficiently produce high-quality marketing content and carry out precise marketing for different groups, and the lack of efficient production capacity of such high-quality content directly affects the effective communication between brands and their target customers and reduces the effectiveness of their marketing campaigns.

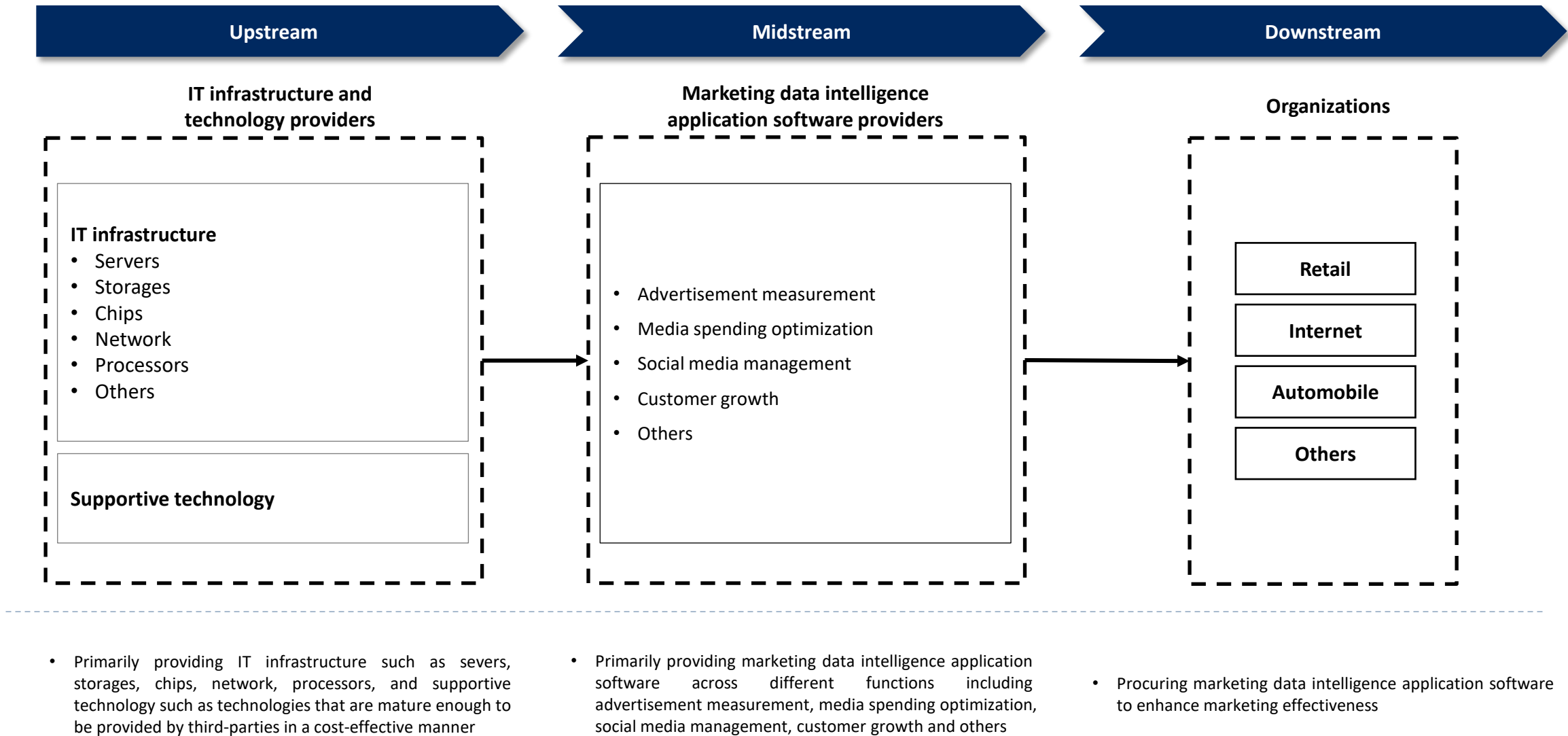
5

The marketing process is multifaceted

- As the marketing process involves different aspects such as measurement, optimization, insights, and advertising, with a large number of participants and fragmented data, it is difficult for enterprises to complete all operations through a unified platform, which makes it a big challenge to efficiently and conveniently carry out marketing campaigns.

Overview of Marketing Data Intelligence Application Software Market in China

Value Chain of Marketing Data Intelligence Application Software



Overview of Marketing Data Intelligence Application Software Market in China

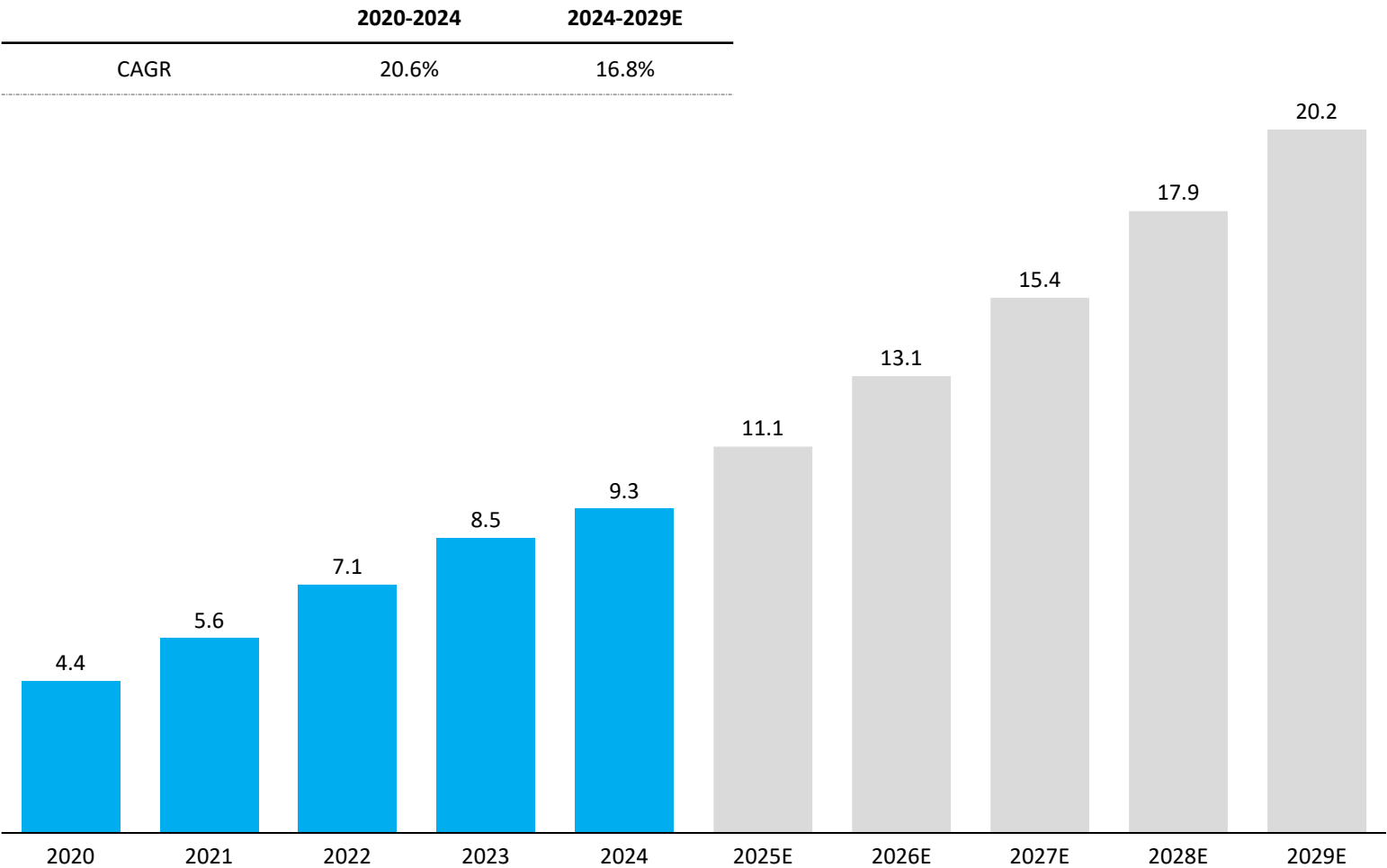
Market Drivers of Marketing Data Intelligence Application Software Market

1	Growing demand on the business side	With increasing competition and mismatch between supply and demand, enterprises have greater demand for marketing. Meanwhile, due to the exponential growth in the amount of data and the diversity of data sources, enterprises face numerous marketing challenges that have led to increasing need for marketing intelligence application software, as it can help enterprises effectively monitor invalid ad traffic, gain insights into market dynamics, and formulate marketing strategies that are more accurate and in line with business needs. Therefore, the growth in demand for marketing intelligence application software is one of the key growth drivers of the market.
2	Digitization of the advertising media	The advertising industry has experienced rapid digital development in recent years, and advertising channels have gradually shifted from offline to online, and particularly, to internet platforms. At the same time, the whole process of advertising, monitoring, content generation and optimization has generated a huge amount of multi-source and heterogeneous online data, giving rise to wide adoption of marketing intelligence application software by enterprises and driving the growth of the overall industry.
3	Rise of social media	With the development of the mobile Internet, social media has become an important channel for consumers to obtain product information and interact with the platform, and users can share a large amount of content such as text, pictures, and videos on media platforms anytime and anywhere. The increasing significance that social media plays in consumers' life propels more diverse forms of marketing. User-generated content and KOLs have an increasing impact on consumers. Enterprises need to use marketing intelligence application software to analyze different content on social media and achieve more accurate insights and analysis of consumers by analyzing massive amounts of heterogeneous data from multiple sources.
5	Expansion of overseas operations by Chinese enterprises	In recent years, Chinese enterprises have been expanding their overseas operations. Due to the unfamiliarity of Chinese enterprises with the overseas local business environment, they need data intelligence application software to enable professional and efficient marketing solutions. The valuable output of marketing intelligence application software, in terms of online traffic monitoring, user profile unification, and marketing content generation, for Chinese enterprises in the process of international business expansion is driving the growth of China's marketing intelligence application software market.

Overview of Marketing Data Intelligence Application Software Market in China

Market Size of Marketing Data Intelligence Application Software Market in China

Market size of marketing data intelligence application software market in China
RMB Billion, 2020-2029E



Key Findings

- Market size of China’s marketing data intelligence application software market has increased from RMB4.4 billion in 2020 to RMB9.3 billion in 2024 with a CAGR of 20.6% from 2020 to 2024.
- Looking forward, market size of China’s marketing data intelligence application software market is expected to reach RMB20.2 billion in 2029 with a CAGR of 16.8% from 2024 to 2029.
- Fake traffic has always been an industry pain point that obscures enterprises’ evaluation of their marketing effectiveness and efficiency, with about 30% of internet traffic in 2024 being invalid or fake.

Overview of Marketing Data Intelligence Application Software Market in China

Key Trends of Marketing Data Intelligence Application Software Market

Multi-channel marketing integration	In the modern marketing environment, with the increasing number of advertising channels and real-time delivery of advertisement, the conventional way of manual integration of advertising data from different channels is becoming more and more time consuming and complex. As a result, enterprises are increasingly inclined to adopt unified data intelligence application software to integrate online and offline multi-channel customer data, in order to gain a more comprehensive understanding of customer behavior and preferences, and to help enterprises maximize the value of marketing investment across different channels, including online stores, offline physical stores, social media, and others channels, and to facilitate more accurate marketing decisions.
Increased attention to marketing content	In the past, marketing campaigns paid more attention to the portrait of potential customers and lacked targeted marketing content for specific potential customer segments. With the rapid development of large language model technology capabilities, marketing intelligence application software is projected to further utilize generative AI capabilities to achieve the automatic generation of multimodal content from text to images and videos and provide more accurate marketing content services by understanding the complex and specific needs among different potential customers.
Demand for all-in-one providers	As large model capabilities continue to evolve, providers that integrate massive multi-source heterogeneous data in different segments of the business process are poised to empower enterprises throughout their business cycle. This progression will drive a growing demand for such all-in-one providers with enhanced large model capabilities and the ability to seamlessly provide different products in different marketing scenarios.

Overview of Marketing Data Intelligence Application Software Market in China

Favorable Policies of Marketing Data Intelligence Application Software Market

Policy Name	Issuing Authority	Issued Date	Key Contents
The Fourteenth Five-Year Plan for the Development of Electronic Commerce 《“十四五” 电子商务发展规划》	Ministry of Commerce Central Internet Information Office, Development and Reform Commission	2021.10.09	Encourage production enterprises to carry out user profiling and behavioral analysis in compliance with the law, realize accurate marketing based on data perception and intelligent algorithms, and comprehensively improve the efficiency of production and marketing linkage.
The 14th Five-Year Plan for the Development of the Digital Economy 《“十四五” 数字经济发展规划》	State Council	2022.01.12	The implementation of special actions for digital empowerment of small and medium-sized enterprises (SMEs), supporting SMEs to start from the links with urgent needs for digital transformation, accelerating the promotion of online marketing, remote collaboration, digital office, intelligent production lines and other applications, and extending and expanding the digital transformation of the whole business and the whole process from the point and to the whole business.
The 14th Five-Year Plan for the Development of the Advertising Industry 《“十四五” 广告产业发展规划》	PRC State Administration of Market Supervision	2022.03.22	Encourage technological innovation and application in the advertising industry, and further promote the digital transformation of the advertising industry. Encourage and support the wide application of technologies such as Internet, artificial intelligence, blockchain, big data and cloud computing in the advertising industry, and strengthen the research and development of basic and key technologies.
Measures for the Administration of Internet Advertising 《互联网广告管理办法》	PRC State Administration of Market Supervision	2023.02.25	These Measures are formulated in accordance with the Advertising Law of the People's Republic of China (hereinafter referred to as the Advertising Law), the Electronic Commerce Law of the People's Republic of China (hereinafter referred to as the E-commerce Law) and other laws and administrative regulations, in order to regulate Internet advertising activities, protect the legitimate rights and interests of consumers, promote the healthy development of the Internet advertising industry, and safeguard the fair competition of the market economic order.
Highlights of National Standardization 2024 《2024年全国标准化工作要点》	Standardization Administration of PRC	2024.02.04	Promote the establishment of new technical bodies of international standards organizations in areas such as digital marketing.
Three-Year Action Plan for Digital Commerce (2024-2026) 《数字商务三年行动计划（2024-2026年）》	Department of Commerce	2024.04.26	Support cross-border e-commerce to empower industrial belts, guide traditional foreign trade enterprises to develop cross-border e-commerce, and establish a marketing service system that integrates online and offline and links domestic and overseas.

Overview of Marketing Data Intelligence Application Software Market in China

Ranking of Top Marketing Data Intelligence Application Software Providers

Ranking of Top Marketing Data Intelligence Application Software Providers in China			
Ranking	Company	Revenue of Marketing Data Intelligence Application Software (RMB Billion, 2024)	Market Share (% , 2024)
1	MiningLamp	0.7	7.8%
2	Company B	0.5	5.1%
3	Company C	0.4	4.3%

Notes:

1) Company C is a private company founded in 2021 as a subsidiary of public company listed on both the Hong Kong Stock Exchange and New York Stock Exchange with the goal to provide data-as-a-service to facilitate organizations’ digital transformation processes in China.

Key Findings

- MiningLamp is the largest marketing intelligence application software provider in China in terms of revenue in 2024.
- MiningLamp has been the first mover in launching several industry-leading products.
- In 2024, Mining Lamp was the first market player in China to achieve intelligent social media content analysis and strategy generation based on multimodal large language models (MLLM).
- To meet the demands for highly accurate understanding of advertisement and advertising content creation, MinningLamp pioneered the introduction of the Hypergraph Multimodal Large Language Model (HMLLM) and Hypergraph Retrieval Augmented Generation (HRAG) technologies in China’s data intelligence application software market.
- MiningLamp was the first data intelligence company in China to be awarded the Media Rating Council’s General Invalid Traffic (GIVT) certification and the first company in China to also receive Trustworthy Accountability Group (TAG) certification, which are certifications required by many top global advertisers when selecting ad measurement service provider.
- MiningLamp processes over 10 billion user behavior logs on a daily basis. This is among the top data processing capability in the marketing intelligence application software industry.
- Miaozen Systems was China’s first and the largest omnichannel media spending optimization platform.
- Miaozen Systems was the leading marketing intelligence application software in China in terms of revenue and breadth of media platforms covered.
- Miaozen Systems has the broadest coverage of media platforms and ad formats among all marketing intelligence application software providers in China.
- Mining Lamp collaborates with major device manufacturers to obtain lists of device MAC addresses, establishing the industry’s first OTT TV monitoring whitelist.
- Miaozen Systems has developed over 8,600 marketing performance indicators, covering multiple dimensions of metrics including the amount of exposure, the number of clicks, geography, media type, creativity, and viewers demographics, offering its users with the most comprehensive marketing measurement features
- MiningLamp’s social media management software covers more than 100,000 media, forums, websites, and platforms, representing the broadest coverage in the marketing intelligence application software industry in China.

Overview of Marketing Data Intelligence Application Software Market in China

Key Success Factors of Marketing Data Intelligence Application Software Market

Key Success Factors

Data quantity, quality and and security

- Data is the foundation for effective analysis in the marketing intelligence application software market. The quality and quantity of data form network effects, making them key success factors in the industry. In marketing settings, data integrity, accuracy, consistency, timeliness, and availability directly impact the conclusions drawn from data analysis and, consequently, the effectiveness of marketing strategies depends on data. Therefore, enterprises need to have the ability to acquire and update a large volume of high-quality data to ensure the effectiveness of their marketing solutions. Additionally, as data privacy protection becomes increasingly important, having strong privacy preserving capabilities and robust data security management mechanisms not only helps enterprises effectively reduce the risks of data leakage and misuse but also enhances providers’ reputation and competitiveness among their clients and business partners. Data privacy and security is one of the key success factors for long-term stable development in the data intelligence application software market.

Transparency in marketing processes

- Transparency in marketing is one of the important areas of focus for enterprises conducting marketing activities and is a key strategy for data intelligence application software providers to build trust and enhance brand value. Instead of earning revenue through margin gains in the advertising traffic trading process, marketing intelligence software providers help enterprises better understand the effectiveness of their ad placements through fair and open analysis and service practices in a data-driven marketing environment, enabling more accurate and responsible marketing decisions. Marketing transparency is not only a crucial way to increase client loyalty to a brand but also an indispensable factor for achieving long-term, sustainable, and healthy development in a competitive market.

Profound know-how of marketing scenarios

- Different industries have unique business processes, operational models, and market dynamics. Customers in different industry segments have varying needs for marketing intelligence application software. Providers need to develop different marketing performance metrics, knowledge bases, and models tailored to industry characteristics, and provide targeted products and services. Additionally, there are significant differences in the needs of large enterprises versus small and medium-sized enterprises in terms of budget, complexity, and technical capabilities. Therefore, understanding the needs of enterprise clients in different industries and flexibly developing corresponding software services based on these needs is one of the key success factors in the marketing intelligence application software market.

Rapid development and promotion of multimodal large model applications

- Large models are expected to play an indispensable role in marketing intelligence. The logical reasoning and content generation capabilities of multimodal large models enable them to understand and analyze user-specific needs and preferences, interact with customers in real-time through AI agents, and automatically generate targeted marketing content, thereby enhancing marketing effectiveness without compromising user experience. Therefore, marketing intelligence application software providers with the ability to rapidly develop and adopt large model applications are expected to build a strong competitive moat in the industry.

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2. Overview of Marketing Data Intelligence Application Software Market in China

3. Overview of Operational Data Intelligence Application Software Market in China



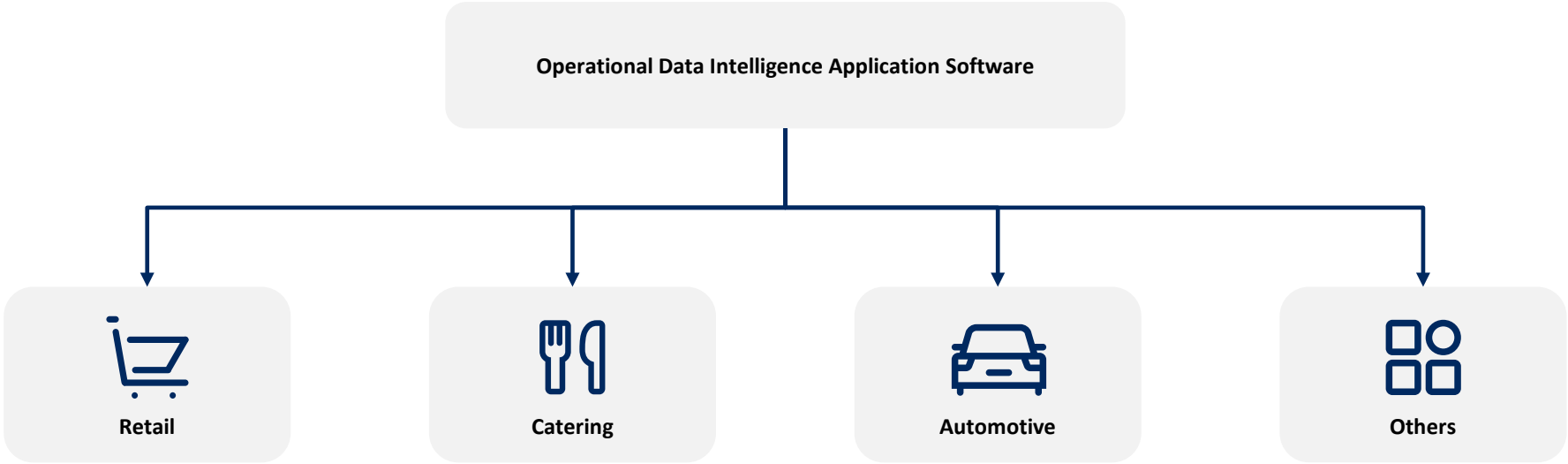
Overview of Operational Data Intelligence Application Software Market in China

Definition and Classification of Operational Data Intelligence Application Software

Definition of Operational Data Intelligence Application Software

- Operational intelligence application software refers to the use of artificial intelligence, IoT, and other technologies to help enterprises address their needs in operational scenarios in the core aspects of people, merchandise, and space, and enable enterprises to make more effective operational management decisions based on data, improve operational efficiency, and achieve comprehensive optimization of operational processes through accurate customer management, intelligent store management and inventory control, and optimized space utilization.

Classification of Operational Data Intelligence Application Software



Overview of Operational Data Intelligence Application Software Market in China

Pain Points and Values of Operational Data Intelligence Application Software

- Enterprises face the following challenges and pain points in their daily operations, and operational data intelligence application software provides powerful support to help them optimize their daily operations and improve customer experience through accurate data analysis. At the same time, it can also help predict market demand, optimize supply chain management, ensure that inventory is in sync with demand, and so on, to reduce waste and improve business efficiency.

1

Daily operations interrupted due to IT failure

- In the daily operation of enterprises, there are often various potential IT disruptions, such as system failures, network outages, etc., which will affect the normal operation of the core business. Through the operational data intelligence application software, enterprises can establish IT failure response mechanism through IT operation and maintenance, so as to realize comprehensive business continuity management, and ensure the continuous operation and stable development of business in various situations. This not only improves the reliability and availability of the system, but also strengthens the enterprise's anti-risk ability and ensures the long-term stable operation of the business.

2

Inefficient sales staff in offline stores

- Operational data intelligence application software can improve the sales and operational efficiency of offline stores by collecting and analyzing customer interaction data generated by sales reps' conversations with customers, allowing managers to better understand store sales performance, customer preferences, and market trends, better manage individual offline stores, enhance employee training, and improve operational efficiency.

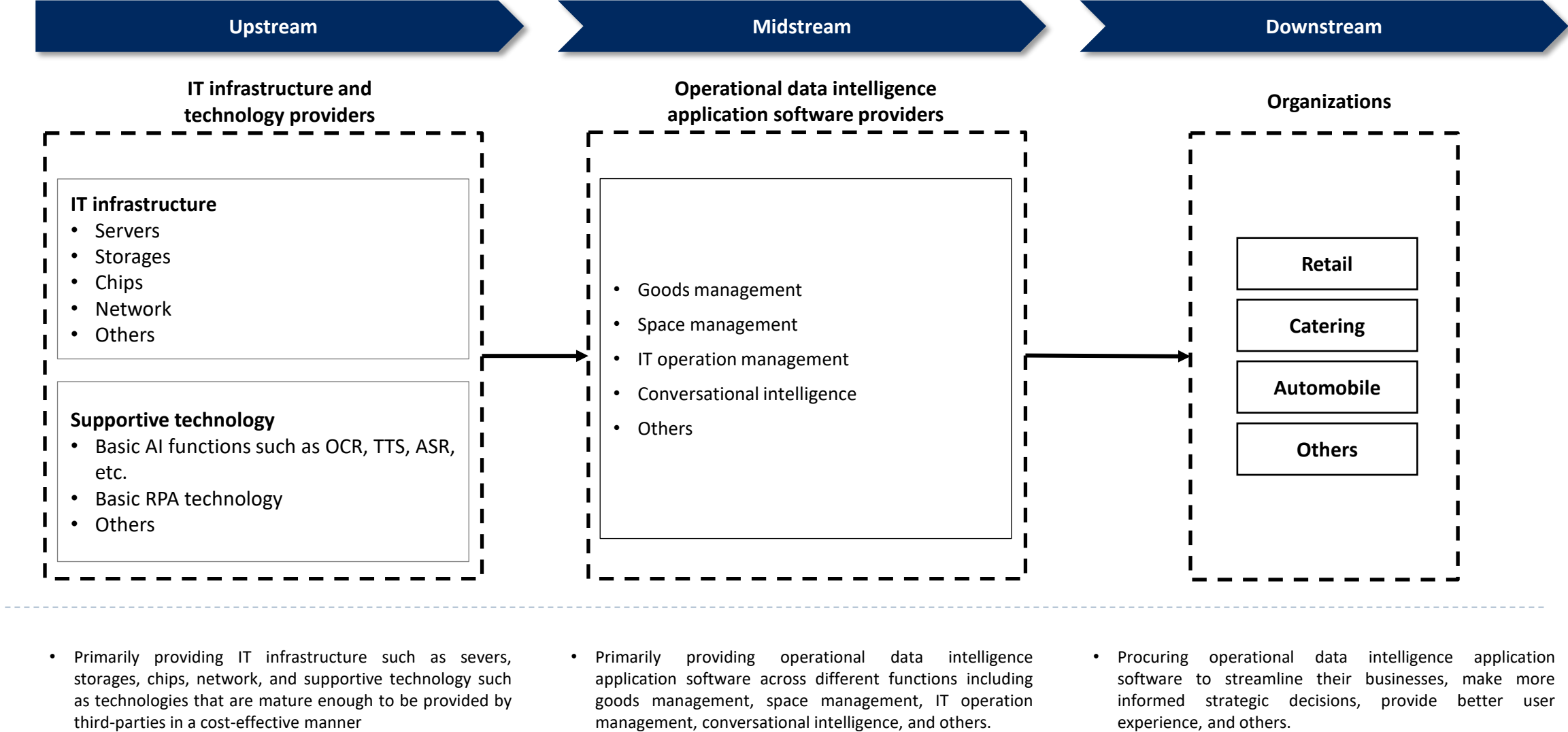
3

Complex goods management in offline stores

- Currently, offline stores face pain points in supply chain management and goods placement, such as inventory backlog, high out-of-stock rate, inefficient goods placement, and untimely response to market changes. Operational data intelligence application software provides offline stores with accurate supply chain management and goods placement strategies through in-depth analysis of sales data, inventory levels, and customer buying behavior. The software uses predictive analytics to optimize inventory, reduce the risk of backlogs, and ensure timely replenishment of popular items. At the same time, they can design smart shelf placement solutions based on sales hotspots and customer flow, enhancing the visibility and attractiveness of merchandise, and thereby increasing sales.

Overview of Operational Data Intelligence Application Software Market in China

Value Chain of Operational Data Intelligence Application Software



Overview of Operational Data Intelligence Application Software Market in China

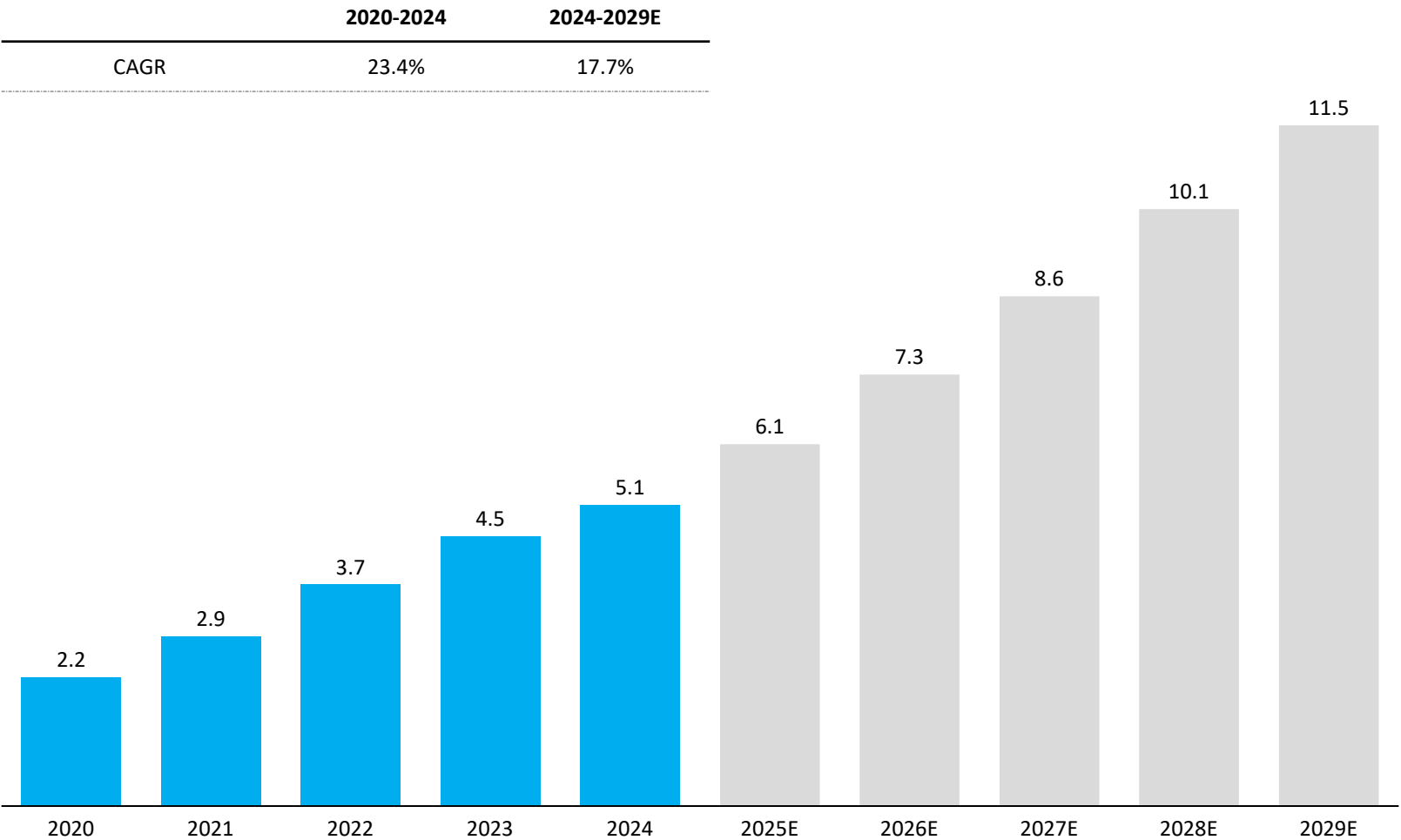
Market Drivers of Operational Data Intelligence Application Software Market

1	Healthy development of China's consumer retail market	China's total retail sales of consumer goods has grown from RMB39.1 trillion in 2020 to RMB48.3 trillion in 2024. The steady development of the retail market along with the increasing offline store chain proliferation rate makes it even more important for enterprises to apply operational intelligence application software to assist their store operations in each region. Operational intelligence application software provides a unified management platform for these enterprises and stores, which improves the management efficiency of enterprises and stores by integrating operational data from different regions, reduces information silos, and promotes the synergy between stores and efficient allocation of resources across regions.
2	Favorable government policies	The Chinese government issued the Outline of Strategic Planning for Expanding Domestic Demand (2022-2035" (《擴大內需戰略規劃綱要(2022 — 2035年)》) in 2022, which identifies the goal to accelerate the digital transformation and upgrading of traditional offline businesses. Propelled by this favorable policy, operational intelligence application software has become an important means for offline stores and retail chains to realize digital transformation and is expected to be more widely adopted by offline businesses.
3	Iteration of cutting-edge technologies	By integrating new technologies such as AI and big data technologies, operational intelligence application software provides enterprises with operational tools such as automated data analysis, accurate market forecasting, and personalized customer service, which significantly improve their operational efficiency and decision-making quality. At the same time, they also help enterprises build a data-driven decision-making culture to ensure that they stay ahead of the curve in a highly competitive market. The continual development of emerging technologies is projected to further enable operational intelligence application software to provide better services to enterprises and drive the growth of the operational intelligence application software market.

Overview of Operational Data Intelligence Application Software Market in China

Market Size of Operational Data Intelligence Application Software Market in China

Market size of operational data intelligence application software market in China
RMB Billion, 2020-2029E



Key Findings

- Operation Data Intelligence application software helps enterprises to solve the management needs of different aspects of people, goods and venues in operation scenarios, and to realize the comprehensive optimization of operation processes by improving operation efficiency, through accurate customer group management, intelligent store management and inventory control, and optimized venue utilization, so that enterprises can make more effective operation management decisions based on data.
- Market size of China’s operational data intelligence application software market has increased from RMB2.2 billion in 2020 to RMB5.1 billion in 2024 with a CAGR of 17.7% from 2020 to 2024.
- Looking forward, market size of China’s operational data intelligence application software market is expected to reach RMB11.5 billion in 2029 with a CAGR of 17.2% from 2024 to 2029.

Overview of Operational Data Intelligence Application Software Market in China

Key Trends of Operational Data Intelligence Application Software Market

Establishment of cognitive stores	Operational intelligence application software is expected to redefine the development of offline chain stores by helping enterprises build cognitive stores, which are highly intelligent, data-driven retail spaces integrating data from different online and offline channels with fully automated processes in areas such as supply chain procurement, inventory management and franchisee management, which optimize operational efficiency and enhance personalized customer experience, driving better sales conversions as compared with traditional offline stores. Operational intelligence application software can, on one hand, help consumers have a better understanding of goods and services before they make the consumption decision, and, on the other hand, help enterprises acquire insights for more informed decision-making through their interactions with consumers. Through integrating advanced technologies, such as AI and big data technologies, and product iterations, the continually upgrading operational intelligence application software is expected to allow enterprises to build technology-driven cognitive stores.
Construction of ecosystems	Operational intelligence application software providers are expected to build a strong partner network, with participants including but not limited to technology providers, system integrators, and channel partners, among others. Such an ecosystem will not only help software providers expand their market coverage and provide more comprehensive solutions, but will also enable operational intelligence application software to seamlessly integrate with hardware provided by different providers through cooperation, enhancing their flexibility and extensibility, which is more favored by end customers.

Overview of Operational Data Intelligence Application Software Market in China

Favorable Policies of Operational Data Intelligence Application Software Market

Policy Name	Issuing Authority	Issued Date	Key Contents
Outline of the Fourteenth Five-Year Plan for the National Economic and Social Development of the People's Republic of China and Vision 2035 《中华人民共和国国民经济和社会发展第十四个五年规划和2035年远景目标纲要》	National People's Congress	2021.03.11	To build a number of international-level industrial Internet platforms and digital transformation promotion centers in key industries and regions, and to deepen the digital application of R&D and design, production and manufacturing, operation and management, and marketing services.
The Fourteenth Five-Year Plan for the Development of Electronic Commerce 《“十四五”电子商务发展规划》	Ministry of Commerce Central Internet Information Office, Development and Reform Commission	2021.10.09	- Vigorously develop smart retailing, support the digital transformation of traditional retail enterprises, accelerate the intelligent upgrading of commercial infrastructure, and promote digital technology in physical stores such as self-service terminals, electronic price tags, smart shelves, flexible supply chains and traceability systems. - Encourage industrial e-commerce platforms to transform into digital supply chain integrated service platforms, provide online and offline one-stop services, and solve business pain points such as procurement, marketing, distribution and customer service.
Fourteenth Five-Year Plan for the Development of Software and Information Technology Service Industry 《“十四五”软件和信息技术服务业发展规划》	Ministry of Industry and Information Technology	2021.11.15	Facing the demand for digital, networked and intelligent applications, it will strengthen algorithmic services under typical scenarios and promote technological innovation related to enterprise-level business continuity management (BCM). Focusing on digital management consulting, integration and integration, intelligent operation and maintenance, it will improve the information technology service system and enhance the specialized information technology service capacity of key industries and fields. It will support the construction of an information technology service ecosystem with the power of perception, control and decision-making.
Development Plan for the Deep Integration of Informatization and Industrialization under the Fourteenth Five-Year Plan 《“十四五”信息化和工业化深度融合发展规划》	Ministry of Industry and Information Technology	2021.11.17	- Guiding the transformation of procurement and sales platforms of large manufacturing enterprises to industrial e-commerce platforms, and improving the level of enterprise supply chain coordination. Guiding third-party industrial e-commerce platforms to extend their services to online trading, payment and settlement, supply chain finance, big data analysis and other comprehensive services, and improving the platform's operation and service capabilities. - Encourage enterprises to restructure their strategic layout, operation management and market services based on production and operation data, form a data-driven efficient operation and management mode, and improve their intelligent decision-making, lean manufacturing and precise service capabilities.
The 14th Five-Year Plan for the Development of the Digital Economy 《“十四五”数字经济发展规划》	State Council	2022.01.12	Developing an intelligent economy based on digital technology, accelerating the optimization of intelligent products and service operations, and fostering new growth points such as intelligent sales, unmanned distribution, intelligent manufacturing and reverse customization.
Guiding Opinions of the National Development and Reform Commission and Other Sectors on Promoting Brand Building in the New Era 《国家发展改革委等部门关于新时代推进品牌建设的指导意见》	National Development and Reform Commission and other 6 departments	2022.07.29	Support enterprises to promote production automation, intelligence and greening, and build a standardized, standardized and refined operation system.

Overview of Operational Data Intelligence Application Software Market in China

Ranking of Top Operational Data Intelligence Application Software Providers

Ranking of Top Operational Data Intelligence Application Software Providers in China			
Ranking	Company	Revenue of Operational Data Intelligence Application Software (RMB Billion, 2024)	Market Share (% , 2024)
1	MiningLamp	0.5	10.3%
2	Company D	0.2	3.5%
3	Company E	0.2	3.3%

Notes:

- 1) Company E a private company founded in 2017, which primarily provides operation intelligence solutions including offline operation and sales data integration solutions, as well as sales and employee training co-pilots solutions.
- 2) Company F is a private company founded in 2016, which primarily provides operation intelligence solutions including offline operation sales data integration solutions and auxiliary marketing solutions.

Key Findings

- MiningLamp is the largest operational intelligence application software provider in China in terms of revenue in 2024.
- Commercialized in 2019, MiningLamp’s proprietary conversational intelligence hardware, Lingting, is also China’s first conversational intelligence hardware developed to be used under noisy environments. MiningLamp applied the data and technical capabilities developed in our marketing intelligence business to the operational domain, launching Lingting, China’s first real-time conversational intelligence hardware that generates valuable sales insights from interactive data in 2019

Overview of Operational Data Intelligence Application Software Market in China

Key Success Factors of Operational Data Intelligence Application Software Market

Key Success Factors

Continual technology iteration capability and product usability

- In the context of rapid technology iteration and upgrades, developers of operational intelligence application software must continually follow the latest technology trends and integrate cutting-edge technologies into their products to stay abreast of the technological curve and achieve agile development. This agility not only helps enterprises quickly respond to market changes and customer needs but also accelerates the product development cycle, ensuring rapid delivery and product iteration. Additionally, due to the complexity of operational scenarios, including numerous service personnel and cross-regional operations, enterprises have high demands for the stability and usability of operational intelligence application software. Therefore, providers must not only constantly bring about technology innovations but also ensure high product usability to meet the needs of their enterprise clients.

Cooperative relationships with channel partners

- Establishing strong relationships with channel partners is one of the key success factors for operational intelligence application software providers to achieve rapid business growth. Operational intelligence application software often involves extensive integration with enterprises' IoT devices, and the maintenance of smooth communication and standardized interface protocols with these partners is beneficial for business operations. Additionally, by collaborating with channel partners, providers of operational intelligence application software can quickly expand their market reach and utilize the partners' industry knowledge, customer resources, and technical expertise to gain a competitive advantage in the market.

Ability to serve clients successfully

- The ability to serve clients successfully is one of the crucial success factors in the operational intelligence application software market. In offline retail businesses, numerous in-store personnel and store locations are involved, complicating the service process. Providers need to ensure promptness and responsiveness in addressing enterprise clients' emerging needs to maintain client satisfaction. This service capability includes software implementation, training, technical support, and a deep understanding of customer needs, regular feedback collection, and a rapid response mechanism. Through superior client services, providers can build long-term partnerships with clients, increase client satisfaction and loyalty, and thus gain an advantage in a competitive market, achieving sustainable business growth.

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Appendices



Appendices

Supplementary Information

	Key Contents
1	Defining KA customer as customers that contribute over RMB3.0 million to our revenue in a year or contribute over RMB1.5 million to our revenue in a half-year period is an industry norm commonly adopted in the data intelligence application software market in China.
2	Major cost components of companies in the data intelligence application software market or, by the extension, the technology service industry, primarily consist of: (i) the salary and benefit expenses paid to employees and (ii) technology services expenses on resources such as broadband. The average annual urban salary for employees in private companies within China’s information transmission, software, and IT services industry increased from RMB85.3 thousand in 2019 to RMB129.2 thousand in 2023, reflecting a CAGR of 10.9% from 2019 to 2023. As year-over-year growth of average salary has been slowing down in recent years, the average annual urban salary for employees in private companies within China’s information transmission, software, and IT services industry is expected to continue increasing but at a more moderate pace compared to historical trends. On the other side, broadband costs in China have steadily declined, supported by the country’s robust infrastructure systems. The cost of fixed broadband services as a percentage of monthly gross national income per capita decreased from 0.6% in 2019 to 0.4% in 2023, ranking as the fifth lowest globally, and such cost is expected to continue to gradually decline from 2023 to 2028. Based on the assumptions of China’s ongoing social and political stability, steady economic growth, and alignment with historical trends, the major cost components are not expected to experience any material fluctuations that would significantly impact our Group’s business.

Scope, Methodology and Key Assumptions



- ✓ This report offers a detailed analysis of the data intelligence application software market in China. Unless otherwise specified, the report defines 2024 as the base year, 2020 to 2023 as the historical period, and 2025 to 2029 as the forecast period.
- ✓ The methodology employed in this report combines data from proprietary database, insights gathered through interviews with industry experts, and our understanding on the defined markets. This integrated approach facilitates a thorough and accurate analysis of current developments, trends, market sizes, and competitive landscapes within the defined markets, ensuring the provision of precise and reliable information.
- ✓ This report is prepared under the key assumptions that the social, economic, and political environments in the PRC and globally will remain stable throughout the forecast period, ensuring sustainable and steady development of the defined markets. It also assumes no significant adverse changes in government policies affecting these markets.

About US

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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.



Source: Frost & Sullivan

Thanks!

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