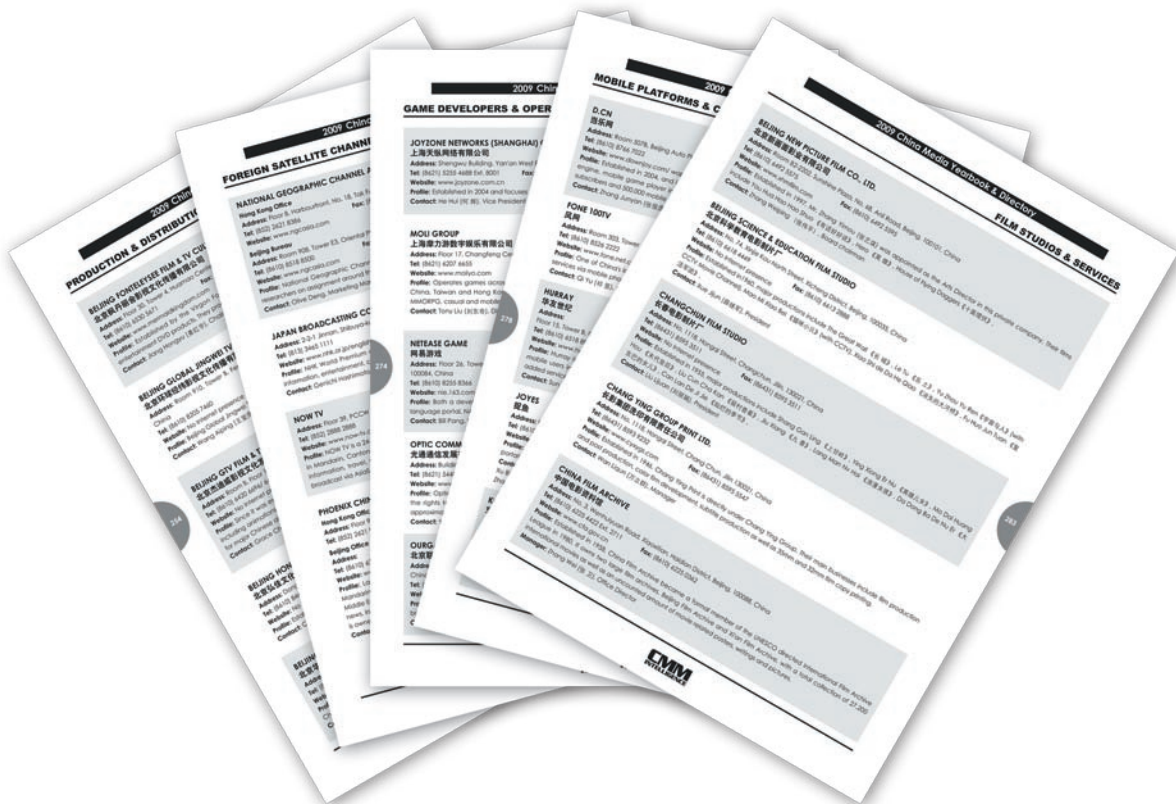


中國媒體年鑒

2009
CHINA MEDIA
YEARBOOK & DIRECTORY





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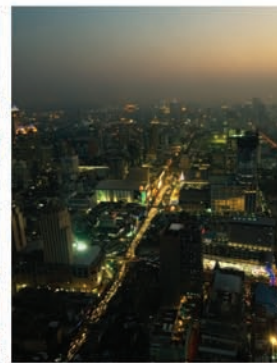
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PUBLISHER'S MESSAGE

Welcome to the *2009 China Media Yearbook and Directory*, the most comprehensive insiders' guide to developments in the world's most complex and dynamic media market.

Last year was a highly emotional one for China and its media industries with the human tragedy of the Sichuan earthquake (which led to national cancellation of entertainment schedules and commercial advertising) contrasting starkly with the sporting, political, commercial and broadcast success of the Olympics and Paralympics.

Momentous changes were also felt towards the end of the year as the scale of the global economic crisis became clear. China, despite remaining one of the few fast growing economies in the world, saw certain sectors of its media economy fall for the first time in many years, but these contractions were more than offset by strong growth in New Media and government stimulus packages that cover cultural industries.

In particular, following the international success of Chinese films in recent years, the government is now providing extra funding for the export of Chinese content through its "Go Abroad" campaign. In this respect, 2008 will be remembered as the year in which Chinese culture, in the form of TV dramas, animation and documentary, started making a commercial impact in overseas markets, a trend we expect to continue with central government support.

Indeed, the continued roll-out of multiplex cinemas that is driving strong domestic box office, positive regulations to promote HD production and broadcast, and the rapid growth of original short form content for online and mobile platforms is combining to provide all China's digital creatives with very favorable working environments, a market defined by steadily falling technical costs, fast expanding distribution channels and fundamentally strong advertising and retail sectors.

To bring sense to these incredible changes and enable companies to react appropriately, the *China Media Yearbook & Directory* is a unique three-in-one publication with detailed editorial analysis of major developments over the last year and analyst projections for the year ahead; an extended statistical section with proprietary data from leading sources; and a fully updated directory of the major media players in China.

While we remain confident that this publication is the single best reference source available, the Chinese media market is in a constant state of change and CMM-I offers a range of knowledge products for senior executives who need to keep up to date on the market. These include a weekly CMM-I news service and CMM-I sector reports which look in depth at the fastest growing sectors.

At the same time, doing business in our industry requires the building of personal relationships and CMM-I is dedicated to providing our clients with the best possible trade platforms in both directions. We organize participation for international clients at leading PRC events such as the Shanghai TV Festival, the China RFT Expo and the Sichuan TV Festival. We are also exclusive the China agents for international content fairs MIPDOC, MIPTV, MIP Junior and MIPCOM in Cannes and the Asian TV Festival in Singapore.

For more information on all these products and services as well as details on our consultancy services, please do visit our website at www.cmmintelligence.com.

In closing, we would like to note that the *China Media Yearbook & Directory* was first published in 1999. We are proud to have chronicled and analyzed the remarkable changes here over the last decade and we are once again delighted to present the latest installment of the world's most compelling media story.

Craig Hobbs, Kristian Kender, Anke Redl, Rowan Simons, Tammy Zhao

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While every effort has been made to ensure the accuracy of all information, the publishers can accept no responsibility for any errors or omissions. We welcome your comments on the 2009 China Media Yearbook & Directory. Please submit your suggestions to info@cmmintelligence.com.

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PART ONE

YEARBOOK

TELEVISION

CHAPTER 1: TELEVISION

1.1 Introduction

2008 was a historic year for the Chinese TV industry on a number of levels. Fueled by the 2008 Beijing Olympic Games, China's TV advertising expenditure reached new highs at RMB431.85 billion (US\$63 billion) while eight new channels were added and TV signals now reach 97% of the population, increases of 0.62% and 0.35% respectively over the year before.

Despite this good news, television as a medium for news and propaganda received unexpected attention following the Sichuan earthquake in May. TV stations played a prominent role in helping the nation react to the disaster, mourn the loss of 70,000 lives and lead a record-breaking donation drive. The earthquake also led to a ban on entertainment shows and commercials in order to maintain an appropriate and respectful mood while relief efforts were underway.

CCTV remains the dominant national broadcaster, a position further reinforced by its coverage of the Olympics, with Hunan Satellite TV the top-rated provincial satellite channel. During the first half of 2008, Ji-

angsu Satellite TV and Sichuan Satellite TV rapidly increased their ratings shares to supplant Anhui Satellite TV and Beijing Satellite TV in the national conscience.

Despite some exceptions, there continues to be significant differences in the commercial development of TV stations around the country at provincial and municipal levels with advertising and production industries strongly concentrated in the more developed eastern regions and cities (see Advertising chapter).

It was only as the dust settled on the dramatic events of the first three quarters of 2008 that China's TV industry returned to a more balanced

schedule and business agenda. 2008 also saw a fast maturing Chinese TV production industry further engage with the outside world via major co-productions and increased attendance at international trade fairs.

1.2 Policy and Regulation

By the end of 2008, China had approximately 2,337 radio and TV stations subject to regulations by the State Administration of Radio, Film and TV (SARFT) and thousands more audio-visual online streaming and download services waiting for more stringent regulation from SARFT and the Ministry of Industry and Information Technology (MIIT).

Convergence continues to test the ability of regulatory regimes throughout the world and China is proving to be no exception. 2008 cemented the Internet in China as a primary means for Chinese consumers to obtain news, information, and entertainment. This has prompted SARFT to work actively to expand its censorship

BOX 1.1: 2008 SNAPSHOT OF CHINA'S TV INDUSTRY

TV Penetration	97%
Cable TV Households	163 million
Digital Cable TV Households	45 million
Pay DTV Households	4.5 million
TV Stations (2008 End)	2,337
TV Channels	1,291, including 77 satellite channels
TV Adspend	RMB431.85 billion (US\$63 billion)

Source: Various

remit over all "AV content distributed via electronic means".

SARFT has not done this by trying to license all online content available on Chinese websites, but is instead using the "tried and trusted" method of forcing local websites to adhere to strict licensing restrictions and censorship rules, or face retroactive shutdown and financial penalties.

New regulations governing online video came into effect January 31, 2008. According to the regulations, jointly issued by SARFT and MIIT, all online video sites must be licensed by both government bodies.

At first, the regulations seemed to indicate that only entities with government ownership could apply for the license. However, when the regulations were actually implemented, privately owned video sites such as Tudou.com and Youku.com were given licenses. The third major online video portal, 56.com, did not initially receive a SARFT license, but this was finally granted on December 31, 2008. For further details on online video regulation, please see the New Media chapter.

Despite SARFT's keen interest in extending its regulatory role to the online world, traditional television was certainly not forgotten in the statute books. Following a meeting of the National People's Congress (NPC)

in March 2008, SARFT further tightened its grip over broadcast content when it directed TV producers not to produce programs with exaggerated themes of horror, violence, thrill-seeking behavior or "bizarre events".

The administration also asked producers not to over-emphasize these themes in the spy dramas that are becoming increasingly popular. Instead, SARFT asked producers to aim for higher aesthetic ideals, by showcasing "appropriate" viewpoints and upbeat themes.

Returning to one of its favorite areas, SARFT extended its ban on the broadcast of foreign animation during primetime by 1 hour. As of May 1, TV stations were banned from broadcasting foreign animation between the "golden hours" of 5pm and 9pm in a move the industry regulator said was "designed to spur the domestic cartoon industry". Developing China's own animation industry, and limiting the supposed influence of foreign cartoons, has been a recurring theme for SARFT.

Following May's deadly earthquake in Sichuan, SARFT initiated a ban on entertainment programming across all broadcasters initially for an unspecified period of time. During this period, China's airwaves were filled only with programming related to the rescue effort and broadcasters were also barred

from airing advertising.

The government eventually provided unspecified subsidies to stations that refrained from airing ads and entertainment programming was quietly allowed to resume from July 7, 1 month before the opening of the Olympic Games.

The Olympics certainly count as SARFT's most successful regulatory campaign of the year. Despite the potential value to pirate operators and the opportunities for guerilla advertisers, SARFT joined with other regulators to purge the entire media landscape, proving that if the political stakes are high enough, the pirates can be exposed as cowards.

By late 2008, DVD shops were once again stocking international blockbusters and "from broadcast" copies of US TV series, while online live streaming of European football resumed as the regulator went back to banning improper programming on licensed channels. On December 15, "vulgar" talk shows that fabricate sensational "real life" stories in an attempt to draw viewers came under fire.

SARFT sent national, provincial and municipal TV stations a circular asking them to prevent talk show staff from making up scandalous "real life" stories to feature on their shows, then employing people to pose as the "genuine guests" involved

TV STATISTICS

CHAPTER 1: TV STATISTICS

1.1 TV Industry Snapshot

Item		Source
Population	1.328 billion	NBSC
TV Penetration by Population	96.95%	SARFT
Cable TV Households	163.42 million	NBSC
Digital Cable TV Households	45.28 million	SARFT
Interactive (Two-way) Digital Cable TV Households	24.00 million	SARFT
Digital Pay TV Households	4.52 million	SARFT
Digital Pay TV Income	RMB1.39 billion (US\$203.22 million)	SARFT
DTH Households	42 million	CMMR
National Broadcaster	CCTV	—
TV Drama Production	14,498 episodes (502 titles)	SARFT
TV Programming Export Revenues	RMB500 million (US\$73.1 million)	SARFT
TV Sets	500 million	SARFT

Source: SARFT, National Bureau of Statistics of China (NBSC), CMMR

1.2 Digital Cable TV Subscribers 2004-2008

	Digital Cable TV Subscribers (Million)	YoY Growth (%)
2004	0.97	—
2005	3.97	309
2006	12.66	219
2007	26.86	112
2008	45.28	69

Source: SARFT

1.3 Top 10 TV Stations by Advertising Income 2008

Rank	Station	Ad Income (RMB Billion)	Ad Income (US\$ Million)
1	CCTV	16.10	2,357.73
2	Shanghai Media Group (SMG)	3.49	511.11
3	Beijing TV	2.50	366.12
4	Jiangsu Broadcasting Corporation	2.09	306.10
5	Hunan TV	2.00	292.92
6	Shenzhen TV	1.63	238.73
7	Zhejiang Radio & Television Group	1.62	237.27
8	Shandong TV	1.40	205.05
9	Anhui TV	1.37	200.65
10	Guangdong TV	1.17	171.36

Source: China Radio Film & TV magazine

1.4 Top 10 Channels by Audience Share and Ratings in Beijing, Shanghai and Guangzhou 2008

Markets: Beijing, Shanghai, Guangzhou	Dayparts: 02:00-01:59	Target: People Aged 4+
Period: 2008/01/01-12/31	All Channels	

Rank	Beijing		Shanghai		Guangzhou	
	Channel*	Share %	Channel*	Share %	Channel*	Share %
1	BTV 1	9	STVN	14	GCTVTJ	12
2	BTV 4	9	STVD	10	GZTV 34	9
3	OBLC	7	OTVE	9	GSTVTJ	8
4	CCTV 6	5	OTVF	5	GDTV 2	8
5	CCTV 1	5	STVCY	5	GSTV 4	6
6	CCTV 3	4	CBN	4	OGLC	6
7	CCTV 5	4	OSLC	4	GZTV 3	5
8	BTV 2	4	STVS	3	GSTV 2	4
9	BTV 7	4	CCTV 6	3	GSTV 3	2
10	BTV 3	3	Hunan TV 1	3	GDTV 3	2

Source: AGB Nielsen Media Research

Rank	Beijing		Shanghai		Guangzhou	
	Channel*	TVR %	Channel*	TVR %	Channel*	TVR %
1	BTV 1	1.3	STVN	1.8	GCTVTJ	1.5
2	BTV 4	1.2	STVD	1.3	GZTV 34	1.1
3	OBLC	1.0	OTVE	1.1	GSTVTJ	1.0
4	CCTV 6	0.8	OTVF	0.7	GDTV 2	1.0
5	CCTV 1	0.7	STVCY	0.7	GSTV 4	0.7
6	CCTV 3	0.6	CBN	0.5	OGLC	0.7
7	CCTV 5	0.6	OSLC	0.5	GZTV 3	0.6
8	BTV 2	0.5	STVS	0.5	GSTV 2	0.4
9	BTV 7	0.5	CCTV 6	0.4	GSTV 3	0.3
10	BTV 3	0.5	Hunan TV 1	0.3	GDTV 3	0.2

Source: AGB Nielsen Media Research

*Channel Codes

Beijing	
BTV 1: Beijing TV – Satellite; News & Comprehensive	CCTV 1: Satellite; Comprehensive
BTV 2: Beijing TV – Terrestrial; Culture & Arts	CCTV 3: Satellite; Variety
BTV 3: Beijing TV – Terrestrial; Science & Education	CCTV 5: Satellite;
BTV 4: Beijing TV – Cable; Movies	Olympic Channel, Sports
BTV 7: Beijing TV – Cable; Life	CCTV 6: Satellite; Movies
	OBLC: Other Beijing Local Channels
Shanghai	
CCTV 6: Satellite; Movies	STVN: Shanghai TV – News
CBN: China Business Network	STVS: Shanghai TV – Sports
Hunan TV 1: Satellite; Comprehensive	OSLC: Other Shanghai Local Channels
STVCY: Shanghai TV – Channel Young	OTVE: Oriental TV – Entertainment
STVD: Shanghai TV – TV Drama	OTVF: Oriental TV – Film



FUJIAN

FUJIAN RADIO & TV BUREAU

福建广播电视局

No. 2, Gutian Road, Fuzhou, Fujian, 350001, China

福建省福州市古田路2号 350001

Tel: (86 591) 8331 0941 Fax: (86 591) 8331 1945

Capital	Fuzhou
Population	35.81 mln
Area	121,400 sq. km
GDP (RMB)	924.91 bln
Per Capita GDP (RMB)	25,908
Per Capita Living Expenditure / Urban (RMB)	11,055.13
Per Capita Living Expenditure / Rural (RMB)	4,053.47
Color TV sets per 100 Urban Households	166.91
Color TV sets per 100 Rural Households	115.00
B/W TV sets per 100 Rural Households	4.62
Computers per 100 Urban Households	68.58
Computers per 100 Rural Households	10.93
Mobile Telephones per 100 Urban Households	186.44
Mobile Telephones per 100 Rural Households	146.26

FUJIAN TV
福建电视台

Address:

No. 2, Gutian Road, Fuzhou, Fujian, 350001, China
福建省福州市古田路2号 350001

Tel: (86 591) 8331 3789

Fax: (86 591) 8334 8489

Website: www.fjtv.net

CHANNELS OVERVIEW

Channel	Description	Coverage
Fujian TV 1	Terrestrial & Cable; Comprehensive	Approx. 35 million viewers in Fujian
South East TV (SETV)	Satellite; Comprehensive	Approx. 500 million viewers in China
Fujian TV 3	Terrestrial & Cable; Public	Approx. 10 million viewers in Fujian
Fujian TV 4	Cable; News	Approx. 10 million viewers in Fujian
Fujian TV 5	Cable; TV Drama	Approx. 10 million viewers in Fujian
Fujian TV 6	Cable; City & Fashion	Approx. 10 million viewers in Fujian
Fujian TV 7	Cable; Economics & Life	Approx. 10 million viewers in Fujian
Fujian TV 8	Cable; Sports	Approx. 10 million viewers in Fujian
Fujian TV 9	Satellite; Taiwan Straits	Approx. 20 million viewers in Fujian and North America
Fujian TV 10	Cable; Kids	Approx. 10 million viewers in Fujian

KEY PERSONNEL

Station President

Shu Zhan (舒展)

Programming Acquisition Contact

Fang Jun (方军), Director

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Bai Xiaopin (白小平), Vice Director,

Tel: (86 591) 8331 4300

Advertising Director

Wu Zhiiming (吴志明)

Tel: (86 591) 8335 3988

ADVERTISING

Rate Card (RMB/Slot)

Timeslot	15 Seconds	30 Seconds
Fujian TV 1		
18:35-18:52	23,500	42,000
19:55-19:58	18,000	32,300
20:08-20:12	13,000	23,200
SETV		
19:30-24:00	36,000	72,000
17:50-24:00	34,500	69,000
17:50-24:00	32,000	64,800
Fujian TV 3		
06:00-12:00	1,500	3,000
14:30-17:30	2,100	4,200
20:15-22:15	3,900	7,800

FUJIAN PEOPLE'S RADIO STATION 福建人民广播电台

Address: No. 2, Gutian Road, Fuzhou, Fujian, 350001, China

Tel: (86 591) 8331 3789 / 8383 1007

Fax: (86 591) 8334 9421

Website: www.fjgb.com

Advertising Department Director: Lin Mu (林牧)

Published Advertising Rates (30" Prime Time Commercial):

General News Channel: RMB550-700, City Life Channel: RMB800-1,500, Traffic Channel: RMB220-430, Music Channel: RMB300-400

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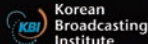
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N

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LIC

NOW EXPANDING INTO THE PRODUCTION OF HIGH QUALITY DOCUMENTARIES



- Over the last 15 years, LIC has established itself as the largest importer and distributor of quality documentaries in China.
- For more than five years, LIC has been producing original documentaries as well as undertaking the re-versioning of a large number of high quality programs looking at many aspects of Chinese society, history, wildlife and warfare, as well as topics outside China.
- LIC uses local knowledge, state of the art equipment and over 240 staff in Beijing, Shanghai, Hong Kong and Sydney, as well as its strong network of domestic and international contacts in the TV production and broadcast industry, to ensure it produces only the best programs.
- In 2009, LIC's *The Last Emperor of China* won the Finalist Award at the New York Film Festival and Best Documentary in Spain. Watch out for many more productions from LIC as they are completed and launched into the marketplace.
- Over the past three years, LIC has worked with producers from USA, Germany, UK, Australia, France and Austria, using its own facilities to assist in the production of programs for broadcast in these countries.



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