

电视新闻 市场竞争研究

唐俊 著

以媒介经济学视角剖析电视新闻节目市场



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序

本著作《电视新闻市场竞争研究》原是唐俊的复旦大学博士论文,写作时间在2007年,论文答辩通过时间在2008年春天。一晃近十年过去了。这十年间中国的新媒体大发展,包括了网络平台上的视频新闻大发展,电视新闻市场竞争的态势也有了很大变化。唐俊在原有论文基础上,增加了对近十年中国电视新闻市场竞争方面诸多问题的研究,丰富了相关材料。继续补充、修改、撰写出这么一部佳作,对于在电视台第一线忙碌工作的唐俊来说,实在是难能可贵。现在的媒体工作者,既圆满完成传播实务工作,又能锲而不舍地从事新闻传播学研究,并不断出成果的,实在稀少与宝贵!这就是学者型、专家型媒体人的典范!这是我看到本著作电子版后的第一感慨与赞叹。

作为曾是唐俊的博士生导师的我,当年会同答辩组的另四位老师一起,对原博士论文《电视新闻市场竞争研究》的评语是:

“本论文选题新颖,研究对象是与中国电视新闻传播相关的主要竞争关系,是以前博士论文较少涉及的领域。作者结合自身的实践经验与实地调查,理论紧密联系实际,提出问题、分析问题、解答问题等逻辑框架与论述条理都很清晰。

本文所要达到的主要目的是:力图运用广播电视学、媒介经济学、竞争

战略研究以及传播学、社会学的相关理论知识和统计数据,深入分析与中国电视新闻传播相关的主要竞争关系的历史与现实状况,探讨各类市场环境的改善路径以及相关的竞争策略、制度建设。

本文的研究特色主要体现在以下四个视角上:1. 经济的视角;2. 国际的视角;3. 历史的视角;4. 实践的视角。研究方法上,本文在实证研究的框架下,以定性研究方法为主,通过收集、分析各种相关材料和具体事实,主要以归纳的方式来形成结论,提出建议。同时也辅以定量的方法(如对收视数据、广告数据的分析),对电视新闻传播的竞争态势进行研究。此外,本文还较多地运用了比较分析法。

最后结束语,提出实行“三级电视”的体制,弱化新闻资源的层级配置性,减少阻止媒介生产要素流动的区域障碍,推进相关行业管理的集中化、统一化,加强对新闻节目的扶持等积极的意见与建议,有着较强的现实指导意义。

通篇观点正确鲜明,有自己的见解与实践经验总结,论据充分,资料与图表翔实,条理清晰,行文流畅,达到了优秀博士论文的标准与要求。”

重新修改、补充、完善的专著《电视新闻市场竞争研究》,继续保留了上述优点,且研究内容更为丰硕,论据论证更为充分,创新点更为显著。

一是具有鲜明的问题意识。提出问题、分析问题、解决问题,目标明确,思路清晰,逻辑性强。本书研究的核心问题是:如何建立一个更为良性的关于电视新闻传播的市场环境,促进中国电视新闻业的发展?在特定的市场环境中,相关媒体应施行怎样的竞争策略?

本书分章论述了以下五组竞争关系:

1. 全国电视新闻节目市场的竞争(主要竞争对手为央视和省级卫视);
2. 地方电视新闻节目市场的竞争(主要竞争对手为省级地面频道与城市台);
3. 境内与境外电视新闻媒体的竞争;
4. 传统电视媒体与新媒体(包括视频网站、“两微一端”等)的新闻竞争;
5. 电视新闻节目与娱乐节目的竞争。

以上五组竞争关系事实上是紧密关联的,前两组是中国电视新闻业内部的竞争关系,后三组是电视新闻业与外部的主要竞争关系。中国电视新闻节目正是在这些错综复杂的竞争关系共同作用下生存和发展的。作者力图比较完整地厘清中国电视新闻传播所处的市场环境和竞争格局,并找出较好的解决问题的对策与建议。

本书提出的核心论点是:优化竞争机制,形成有效竞争,是改善电视新闻传播市场环境的必由之路。为此,应弱化新闻资源的层级配置性,形成“三级电视”的市场竞争格局,明确各自的发展道路。鉴于垄断的根本原因是准入障碍,本书提出,在现有体制环境下,只有减少省级卫视报道全国性新闻议题的准入障碍和跨区域经营的体制障碍,更合理地配置新闻资源,才能有效改变全国电视新闻节目市场竞争性不足的状况,促进电视新闻改革和电视业的总体发展。本书还借鉴竞争战略理论与核心竞争力理论,系统分析了省级卫视的三种基本新闻竞争战略:粗品化与低成本化、特色化与风格化、专业化与区域化,均有一定的创新意义。

二是具有独特的研究视角。以媒介经济学的视角分析电视新闻节目市场是一种很有新意的尝试。在分析相关市场的竞争策略时,注重引入战略管理理论,使研究更具理论色彩,更为规范。这样的研究,对于深化对中国电视新闻节目市场乃至整个电视市场的认识,实施有针对性的竞争战略,探索更有效的媒介管理体制都具有建设性意义。

三是具有较强的实践意义。中国电视新闻业面临着多方面的挑战,在此背景下如何在电视新闻业内部形成良性、有效的竞争,促进电视节目市场的健康发展,更好地服务于社会公众,并在此基础上应对来自境外电视、各类新媒体以及娱乐节目不同方面与强度的外部挑战?这对于中国电视新闻业而言,是颇具实际意义、值得花大力气深入研究的战略课题。

本书进一步延伸研究,认为媒介管理部门的有效规制和自身改革对建立良好的市场环境至关重要。论著提出了积极的改革建议:全国市场缺乏竞争,就应放松对地方卫视的规制,建立一个更为公平的竞争环境;有的地方市

场出现了低水平竞争、无序竞争的状况,就要通过行政、法律、经济等多方面的
手段实行规制,消除“民生新闻大战”的负外部性;对于来自境外电视的竞争,
规制思路也应当从完全封闭到适度开放;在新媒体时代,政府规制必然走向
社会化、法制化、集中化;对于电视泛娱乐化现象,还须在制度、政策层面加
强对新闻节目的扶持,有效调控电视节目生态;要发挥好规制和调控的作用,
促进电视新闻节目市场的健康发展,宣传管理部门自身也必须深化以管办分
离为目标的改革。这些方面,都有较强的现实指导意义。

此外,本专著研究视野广阔,采用经济的视角、国际的视角、历史的视角、
实践的视角,全方位、多角度地审视、探讨矛盾与问题,在各个章节都穿插了
典型案例分析,对理论论述进行佐证与阐明。本书还较多运用了共时性的横
向比较方法,包括全国电视新闻节目市场与地方电视新闻节目市场、中国电
视市场与西方发达国家电视市场的比较等,从而使研究逐步深化。

总之,本书选题、研究角度新颖,内容扎实丰富;观点鲜明,论据充分,研
究方法科学;结构严谨,逻辑性强,理论与实践紧密结合,行文流畅。本书不
仅可供相关宣传管理部门与各级电视台负责人作为战略性、策略性思考的参
考材料,同时可用作大专院校新闻学专业、广播电视专业的教学参考书籍与
媒体工作人员的培训教材,以发挥更大的传播价值。

呈上一些阅评感悟,是为序。

复旦大学新闻学院教授、博士生导师 张骏德

2017年10月

内 容 摘 要

新闻信息需求是电视观众的第一需求,因而电视新闻节目是电视台的“立台之本”,社会影响力巨大。在处于转型期的中国,新闻节目得以健康地发育,充分发挥传播信息、引导舆论的功能,对于经济社会的发展,对社会主义民主政治的推进都有着重要的意义。然而近年来电视新闻节目的竞争力下降,收视率和市场份额持续下滑,电视市场的泛娱乐化现象十分明显,不少电视频道特别是省级卫视以综艺真人秀和影视剧作为主要内容。这种局面的形成,既有电视新闻业内部的原因,也有来自外部的影响。**本书的研究对象是关于电视新闻传播的主要市场竞争关系,研究目的是探讨各类市场环境的改善途径以及相关的竞争策略、制度建设。**

本书的主要内容和观点如下:

第一章展现了电视新闻竞争所处的社会环境、行业环境和市场环境,分析了新闻竞争的社会动因所在,以及行政化的电视行业体制对市场竞争的客观影响。此外,还初步分析了电视新闻的竞争格局和市场结构。本章的主要观点是:新闻竞争包括电视新闻竞争的社会动因涉及政治、经济、文化、技术等诸方面;中国电视的行业体制使得相关的市场带有很强的特殊性,形成了“一个中心,混合竞争”的格局;进入新世纪以来,新媒体的迅猛发展对原有的市场格局形成了巨大的冲击。

第二章和第三章的研究对象是全国电视新闻节目市场。第二章从媒介经济学的视角,对全国电视新闻节目市场的竞争状况进行了分析。在全国市场上,央视处于垄断地位,省级卫视的发展空间受到较大的限制。这种接近完全垄断的市场结构决定了相应的市场行为,对市场绩效(包括生产效率、节

目创新等)带来不利的影响,而且有损公平性。第三章则在参照西方发达国家电视新闻节目市场状况的基础上,对改善全国市场的竞争格局进行了探讨。本章认为,央视应垄断中央时政新闻的报道,以保证中央政令传达的权威性。在此前提下,同时应减少省级卫视报道全国性新闻议题的准入障碍,使之对央视构成更有力的竞争,以促进中国电视新闻改革及电视行业的发展。此外,本章借鉴迈克尔·波特的三种基本竞争战略理论,提出了省级卫视在现有体制环境下可实行的新闻竞争战略。

第四章的研究对象是地方电视新闻节目市场,着重探讨城市市场。本章仍然采用媒介经济学的框架,经过分析认为,城市市场形成了寡头垄断的市场结构,相对全国市场而言,竞争更为充分,更有利于市场绩效的提高和公平性的保障。但地面频道的“民生新闻大战”产生了一些负外部性,需要媒介管理部门进行有效规制。本章还对地方市场未来的竞争进行了展望。

第五章研究的是电视新闻传播的对外竞争。在全球化时代,电视新闻的竞争必然是国际性的。本章认为,境外华语电视新闻媒体与内地电视业形成了既竞争又促进的关系,内地电视业的最佳防御之道是加强“本土化”。随着技术的进步,西方卫星电视新闻频道对我国的影响势必越来越大,而中国对外电视媒体亟须适应国际传播的潮流,改进语态和叙事技巧,发展国际化团队,同时通过市场运作增强自身的竞争力。

第六章和第七章分别论述了对于电视新闻传播的两大替代性威胁——新媒体和娱乐节目的冲击。第六章的基本观点是:新媒体时代的电视新闻节目市场既延伸又分化,因此机遇与危机是并存的。传统电视新闻媒体应发挥比较优势,改革信息生产和传播方式,构建新媒体产业链,积极应对新的市场竞争环境。本章还对新媒体时代电视新闻节目市场的发展趋势进行了展望。第七章分析了传媒娱乐化时代“新闻立台”的淡化趋向、电视新闻节目所面临的市场困境,指出娱乐化是新闻节目发展的歧路,并探讨了电视新闻的改进方向。

最后,结语对全文的内容和观点进一步进行了概括和总结,并指出了本

书研究的不足之处。

本书的主要理论创新点有:

一、整体性创新:以媒介经济学的视角分析电视新闻节目市场(主要是第二、三、四章)。以经济学的视角分析电视产业、电视市场的论著并不少,但对于电视新闻节目市场的相关分析却是很少见的,主要原因是电视新闻的意识形态性比较强,相关市场的行政化色彩浓厚。尽管如此,电视新闻节目及依附于其的广告收入事实上构成了电视产业非常重要的部分,像中央电视台的广告收入就主要来自新闻节目,不少地面频道也是靠民生新闻栏目的经济效益支撑。所以,以媒介经济学的视角分析电视新闻节目市场是一种很有新意的尝试,虽然难免有生硬之处,但仍具有较强的理论创新意义。此外,本书在分析相关市场的竞争策略时,注重引入战略管理理论的一些成果,使研究更具深度,学术上更为规范。

二、核心论点:优化竞争机制,是改善电视新闻传播的市场环境的必由之路。为此,应弱化新闻资源的层级配置性,形成“三级电视”的市场竞争格局,明确各自的发展道路。鉴于垄断的根本原因是准入障碍,本书提出,在现有体制环境下,只有减少省级卫视报道全国性新闻议题的准入障碍和跨区域经营的体制障碍,更合理地配置新闻资源,才能有效改变全国电视新闻节目市场竞争性不足的状况,促进电视新闻改革和电视业的总体发展。本书借鉴竞争战略理论与核心竞争力理论,系统总结了省级卫视的三种基本新闻竞争战略:粗品化与低成本化、特色化与风格化、专业化与区域化。此外,面对来自境外电视、新媒体以及娱乐节目等不同类型和强度的挑战,传统电视新闻媒体应发挥好自身在资源、品牌、公信力等方面的优势,积极主动地应对,在竞争中彰显难以取代的核心价值。

三、延伸论点:媒介管理部门的有效规制和自身改革,对建立良好的市场环境至关重要。全国电视新闻节目市场缺乏竞争,就应放松对地方卫视的限制,建立一个更为公平的竞争环境;有的地方市场出现了低水平竞争、无序竞争的状况,就要通过行政、法律、经济等多方面的手段实行规制,力求消除

“民生新闻大战”的负外部性;对于境外电视的渗入,规制思路也应当从完全封闭到适度开放,更迫切的是增强自己的对外传播实力;在新媒体时代,政府规制必然走向社会化、法制化、集中化;对于电视泛娱乐化现象,还须在制度与政策层面加强对新闻节目的扶持,调控好电视节目生态。要发挥好规制和调控的作用,促进电视新闻节目市场的健康发展,媒介管理部门自身也必须深化以管办分离为目标的改革。

关键词: 电视新闻 市场 竞争

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ABSTRACT

News information is what TV viewers need most. Therefore TV news programs are the cornerstones of TV stations while exercising great influence on the society. In the facts – changing Chinese society, the healthy growth of the news programs and its fully playing of the role of broadcasting information and guiding the public opinions are quite important for the development of the social economy and the progress of the socialist democracy and politics. In recent years however, as the competence, rating and market share of TV news programs were constantly sliding down, the pan-entertainment trend in TV programs is very obvious, and many TV stations are becoming “Reality show or TV series stations”, especially provincial satellite TV. The reasons could be found not only in the TV news industry itself, but also in the effect from external world. The research object of this thesis is the major competition relations in the markets of TV news broadcasting. The goal of research is to explore and discuss various ways of promoting market environment, related competitive strategies as well as systematic construction.

The major content and points of this thesis are:

Chapter 1 described the social, industrial and market environments of TV news competition, and analyzed the social motives of news competition and the objective effects of administrative system of the industry on the market competition. The competition pattern and the market structure of the

TV news industry are also discussed in the chapter. The major points are: the driving forces of the news competition esp. the TV news competition are linked with political, economic, cultural and technical aspects, and so on; the unique system of the industry makes the related markets quite special and has created a “one-center-with-mixed-competition” pattern; besides, the growing new media also cast severe impact on the markets.

The research object of Chapter 2 and Chapter 3 is the national market of the TV news programs. Chapter 2 analyzed the competition situation in the national TV news markets from the angle of media economics. In the national news programs market, CCTV monopolizes and the space for the development of provincial satellite TVs is quite limited. The almost fully-monopolized market structure has decided the corresponding market activities and has cast negative influence on the market effectiveness (including productivity and creativity of programs) and damaged the fairness and justice of the markets. Chapter 3 discussed the ways to upgrade the competitive patterns in the national markets by comparing it with the TV news markets in Western developed countries. The thesis concluded that CCTV should only monopolize the political news reports to assure its authority of broadcasting central political policies. Based on that, the provincial satellite TVs should not be excluded from reporting the national news events. They should compete more powerfully with CCTV and to promote China's TV news reform and speed up the development of the industry. Furthermore, the thesis figured out that the competitive strategies for provincial TVs under current systems by applying Michael E. Porter's three Generic Competitive Strategies.

The research object of Chapter 4 is local TV news markets especially the city markets. The chapter is also based on the frame of media economics.

Based on its analysis, the thesis concluded that the city markets have evolved an oligopoly market structure in which the competition is fiercer than that in the national markets. But the media war on livelihood news between local channels has created some negative external effect. Thus the management by the authoritative departments of the government become a must. The chapter also looked forward the future of the city market competition.

The research object of Chapter 5 is the external competition of TV news broadcasting. In the age of globalization, the competition of TV news is also internationalized. The thesis found that a relation of mutual competing and promoting has been developed between foreign mandarin TV news media and domestic TV industries. The best defend of domestic industries is "localization". With the progress of technology, the impact of western TV news channels on domestic markets become much greater. Therefore, China's own foreign news TVs need to adapt to the trend of international communication, and improving narrative skills as well as develop international reporting teams. Besides, try to promote its competence by market operation.

Chapter 6 and Chapter 7 discussed respectively the two replacement threats in TV news broadcasting — new media and entertainment program and their impacts. The basic point of Chapter 6 is that TV news markets are not only extended but also divided in the age of new media, therefore the opportunities are coexisting with the risks. The traditional TV news media should give full play to its comparative advantages, reform the ways of producing and broadcasting information, construct the industrial chain of the new media, and actively cope with the new environment of market competition. This chapter also analyzed the development trend of the TV news market in the age of new media. Chapter 7 analyzed the flagging of the

concept of “news based TV station”, and the market difficulties faced by TV news programs in the age of entertaining media. The thesis pointed out that entertainment trend of news programs is the wrong direction of development. And, the reform direction of TV news programs is also discussed in the thesis.

As the conclusion of the thesis, Chapter 8 summarized the content and points of the thesis. Furthermore, the shortcomings of the research are also mentioned in this chapter.

The major theoretical creativeness of the thesis are:

Firstly, the thesis analyzed the TV news program market from the angle of media economics (mainly in Chapter 2, Chapter 3 and Chapter 4). There are quite a few articles discussing the TV industries and markets from an economic perspective, but few of them have made economic analysis on TV news markets. Why? It is mainly because of the strong ideological character of TV news and the administrative nature of the relevant markets. Even though, TV news programs and their huge commercial income are actually becoming a crucial part of the TV industry. For example, the major commercial income CCTV is from its news programs, and many local TVs are supported by their news programs reporting people's livelihood. So, it is a nice try for the thesis to analyze the TV news program markets from the angle of media economics. Although there are some improper applications, the theoretical creativity of the thesis is still meaningful. Besides, when discussing the related competitive strategies, the thesis tried to make its analysis more theoretical and standard by bringing the practical content into the frame of strategic management theories.

Secondly, core points: The thesis figured out that to optimize the competitive system is the only way to enhance the market environment of TV

news broadcasting. To do that, the hierarchy of the allocation system of news resource should be changed and a three-level competition structure of the TV markets should be established with clear developing patterns respectively. Since the high threshold of the industry is the root of monopoly, the thesis suggested that under the current systematic environment, to diminish the obstacles for provincial satellite TVs to report national news events and operate across regions is the only way to change the situation of monopoly and promote the reform of TV news and the development of the industry as a whole. By applying the competitive strategy theory and the core competence theory, the thesis summarized systematically the three basic strategies of news competition between provincial satellite TVs: crudely-made and low cost strategy, characteristic and stylish strategy, as well as the professional and regional strategy. Facing the challenges of different types and intensities from the cross-border TVs, new media and entertainment programs, traditional TV news media should play its own advantages in resources, brands, credibility, and respond to the challenges positively for highlighting core values that are hard to be replaced in competition.

Thirdly, extension points: The effective discipline and self-reform of propaganda management departments are crucial to the establishment of a favorable market environment. While the national markets are lacking in competition, we should loosen the controls on local TVs to build a fairer competitive circumstances. While there are certain over-competitive situations in some local markets, we should discipline the markets by administrative, economic, or other type of means to eliminate the negative affection of the news war on citizens' livelihood. As to the competition from the cross-border TVs, the concept of discipline should be developed from complete closing down to appropriate opening up, and more urgent task is to enhance our

international communication strength. In the new media age, government discipline has to become more socialized, legalized and centralized. To coping with the pan-entertainment trends in TV programs, the government should strengthen the support to news programs at systematic and policy levels to efficiently adjust the ecological balance of TV programs. We should give full play to the effectiveness of discipline and adjustment to promote the healthy development of TV news program markets. The propaganda management departments itself should speed up the separation of administration from operation, and deepen the reform of cutting off the interest links between itself and the regulated.

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