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# 传媒指数蓝皮书®

BLUE BOOK OF CHINA'S MEDIA INDEX

# 中国传媒发展指数报告 (2008)

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## ANNUAL REPORT ON CHINA'S MEDIA DEVELOPMENT INDEX (2008)

中国人民大学新闻学院  
中国人民大学新闻与社会发展研究中心  
主 编 / 喻国明



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SOCIAL SCIENCES ACADEMIC PRESS (CHINA)

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## 中文摘要

本研究报告是国内首次系统地将传媒发展的数据指标与国民经济的发展指标及作为媒介生态圈的社会环境指标加以统合计算,形成评估我国传媒发展业态、预测其可能的发展趋势的测评体系。本报告认为传媒经济对国民经济和社会环境有派生性、依附性,全面、准确、科学地判断和评价二者之间的关联关系,具有十分重要的意义。本报告正是在构建中国传媒发展指数的测评框架的基础上,尝试对于我国传媒的发展现况进行的定量测评。

本报告分为三个部分:报告概述、主体报告和专题报告。

在概述中,我们对中国传媒发展指数(China Media Development Index, CMDI)的提出背景、指标选取、数据采集等做了详细的说明。主报告依据技术路径对全国各地的媒介发展指数进行了测评,并对结果进行了聚类分析。分省报告对全国各省(市区)的媒介发展水平和媒介环境进行了具体的评价,并结合当地社会发展的特点进行了解析及预测。专题报告围绕宏观经济与媒介产业的关系,从不同的角度深入探讨了媒介产业的制约因素。

根据课题组制定的中国传媒发展指数的计算方法,本报告对2006年全国31个省级行政区(不含台、港、澳)的发展指数和媒介与环境两个单项的指数进行了测算和排序,利用描述统计的方法,得出全国各省份传媒发展指数值和整体排名情况。在传媒发展指数综合得分排名中,处于传媒发展指数前8位的省市依次是广东、北京、上海、浙江、江苏、山东、天津和辽宁,属于媒介发展相对发达的省市,处于传媒发展指数后8位的省区依次是青海、甘肃、云南、广西、宁夏、贵州、西藏和海南。媒介发展总指数、媒介面的得分和环境面的得分排名波动并不完全一致,但是总的



趋势是近似一致的,在媒介发展指数这条中线的上下,媒介面和环境面的曲线上下波动,但是波动幅度都不大,这两条曲线围绕着中间的媒介发展指数曲线此消彼长。通过对媒介面和环境面指标得分的相关分析可以发现,两者显著相关,相关系数为 0.75 ( $P < 0.001$ )。

通过对该报告中所用的两个二级指标媒介面得分和环境面得分的聚类分析可以看出各省市区传媒发展上的一些类似特征的分布。本报告采用迭代聚类分析法(K-MEANS Cluster),由系统自己估计初始聚类中心,在反复比较的基础上,指定分类数为 3,对省市区发展指数数据进行聚类。从聚类的结果看,广东、北京、上海、浙江、江苏和山东 6 省市被分在第一类,这 6 省市无论从媒介发展的现状还是从媒介发展的环境看,都处于全国前列,而且是远远的位于全国平均水平之上,这 6 个省市是中国媒介发展的领头羊,同时也是中国经济发达地区。第二类地区的 13 个省市区,基本属于媒介自身现状和媒介发展环境一低一高的地区,这些地区的媒介发展状况和媒介发展环境之间存在发展的不平衡、不协调。天津、山西和内蒙古三地属于媒介自身发展落后于媒介发展的经济社会环境的地区,这些地区的媒介应该有进一步挖掘的空间。相反,河北、河南、四川和湖南属于媒介发展超前于其宏观经济社会环境的地区,这些地区虽然媒介发展的环境居全国平均水平之下,但是媒介发展的规模居全国平均水平之上。第三类地区的 12 个省市区媒介自身发展现状和媒介发展的环境都低于全国平均水平,属于媒介发展及其经济社会环境“双低”的地区,这些省市区经济上属于欠发达地区,媒介发展的现状也是比较落后的,经济社会的发展和媒介的发展是紧密相连并相互推动的,这些地区要发展媒介产业,还必须加大经济社会发展的力度。

通过对全国各省市区广告发展水平、发展活力的分析,以及与国外数据的对比,可以得出以下结论:①从宏观经济对广告市场的作用的一般规律来看,存在强者愈强、弱者愈弱的马太效应,即经济越发达,广告在经济总体中所占的比例越大,广告增长速度越快,广告未来的发展潜力也越大。②对各省市区数据在两个指标方面的研究,都发现 GDP 状况与广告市



场状况错位的现象，比如山东省经济发达程度高，但是广告市场发展水平低；而西藏、重庆等地区经济发达程度不高，但是广告市场状况处在全国比较靠前的位置。这说明 GDP 与广告市场并非线性相关，其他影响因素，比如人口规模、消费水平等，也是广告市场的重要影响因素。③本报告在广告与 GDP 关系的两个层面上进行了聚类分析，每种聚类结果的“第二类”地区都是今后广告从业者需要重点关注的对象，这些省市经济发达，但广告发展落后，有更多的市场空间有待于开掘。

# **Abstract**

## **Backgroud**

With regard to the dominating concept of the embeddedness of media industry in the environments it roots in, this report integrated a set of scientific and statistic index of media development, economic development and societal development to analyze the state and future of their correaltions in a clear and comprehensive way. By developing a framwork of measuring index in term of China's Media Development Index (CMDI), the research group evaluated media economic growth and regional differences.

Since the fulfillment of reform and opening-up policy, the Chinese economy keeps fast and continuous growth and this leads the media sector a prosperity in many aspects of the industry. One of the contributions of the evolutionary policy is that it initiated the process of marketization of the old media system and then achieved great growth of the industry, however, also accompnies with unequal development of the industry. This sort of differentiation and imbalance is reflected in regions and displays a complex articulation of media development and its social and economic context.

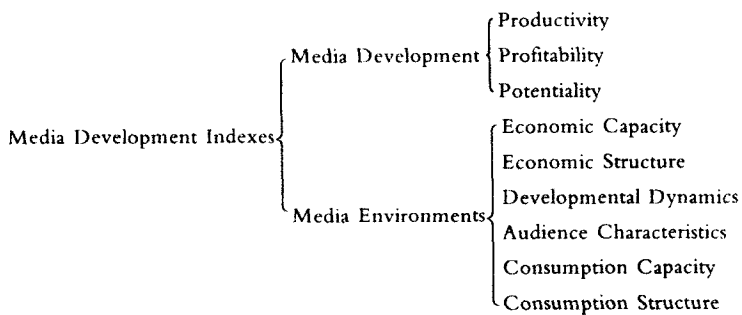
## **Methodology**

The construction of an evaluation index should deal with the selection of analysis units and indexes elaborately. At the beginning stage, the researchers of this study explore all the possible factors which may influence the media industry by the qualitative methods on the basis of their comparability, predictability,



measurability, operationality, as well as the independence and stability, then we wipe off some indexes through the trial-and-error method. We do this by testing the relationships between the possible indicators and the media income in advertisement—the most important index in the media industry and wipe off the low-correlation indexes. Also, we do this by applying some possible indexes in a specific province to get an score of media development and then compared it with the reality in this province and select those indexes which have the best goodness of fit with the reality. Finally we choose the CMDI by a composition of two parts, the media industry itself and the media environment. The index has 9 second-level indicators and 18 third-level indicators in the study.

The decision of the weight for each indicator in the social evaluation studies is usually carried out by several approaches. In this study, all the selected indexes at the same level have similar contributions according to focus group study by interviewing, media scholars and industrial experts. Thus the same level indexes have the same weights in computing the final indexes. All the first and second levels of indexes are listed below:



For the historical and geographic reasons, each province in China has different characteristics in culture, economy and politics which make the media development different from one province to others, in short, media industry shares high homogeneity within the province and heterogeneity between the provinces. Thus the analysis unit is 31 provinces in China.

All the data in the study is based on 2006 without special notes which are the latest data. The data are mainly collected from the following channels:





1. Annual statistical data of the media administration authorities, like *General Administration of Press and Publication of the People's Republic of China*, *State Administration of Radio Film and Television*, *State Administration for Industry Commerce*, *Ministry of Science*, *Ministry of Culture* etc.

2. Some almanacs on the relative industries and national economy, like *China Statistics Yearbook*, *China Journalism Almanac*, *China Urban Life and Price Yearbook*, *Bulebook of Newspaper Industry* etc.

3. Data from relative institutions of media market research. Such as the data of advertisement from *China Advertising Association* and data of audience from *CSM*, *CTR Market Research* etc.

Since all the data have different units and then have great variations in the magnitude. The necessary step before computing the score is to transform the original data to standardized scores (or Z scores) through the following formula:

$Z = \frac{x_i - \bar{x}}{S}$ , where  $x_i$  is the observed value of each index,  $\bar{x}$  is the mean of each index,  $S$  is the standard deviation of each index through the formula:

$$S = \sqrt{\frac{1}{n-1} \sum_{i=1}^n (x_i - \bar{x})^2} = \sqrt{\frac{(x_1 - \bar{x})^2 + (x_2 - \bar{x})^2 + \dots + (x_n - \bar{x})^2}{n-1}}$$

The standardized data are comparable with each other but the standardized score of each index just vary from  $-3$  to  $+3$ . (about 99.7% of data within this scope because all the data can be treated as normal distribution). So about half of the Z scores are minus and for the straightness of observation all the data were plus 3 ( $Z_{final} = Z + 3$ ) and then more than 99% of data were positive.

## Findings

The economy development has great influence on media industry. Firstly,



the economy development determines people's requires for information, and then determine scope of the media market, which is called the "Principle of Relative Constancy". This theory was addressed for the first time by McCombs and had been testified by many other scholars. The essential idea of this theory is that the ratio of media consumption to economy development, always represented by GDP, is a relatively stable number. Economy development growth will provoke the media consumption to grow by a certain rate. Secondly, media industry in China is motivated mostly by advertisement, which is also influenced by economy development to a great degree. This study found that the correlation between economy development, with the indicator GDP, and media market, with the indicator advertisement expenditure, is fairly significant. We chose GDP, economic property index, industrial structure, urbanization rate, per capita disposable income and per capita consumption expenditure.

For GDP, this study found that most provinces in eastern area are higher than national average level in both GDP and advertisement expenditure, while most provinces in western area are lower than national average level in both two indicators. However, there are exceptions. Provinces include Hubei, Fujian are higher than national average level in economy development but lower in advertisement expenditure, which means media market are under-exploited and there is still potential for future development.

For economic property index, this study found that the correlation between this indicator and media market are not so significant for several reasons. The most important one is that economic property index is reflect of future economy development. It does not always keep the same trend with real economy situation. Since this study is trying to figure out the potential of media market, we keep this indicator to make the whole report more future-reflecting.

For industrial structure, this study found a similar geographic trend with GDP indicator, i. e. provinces in the eastern area are mostly higher than average both in



industrial structure and media market, while western area lower. But the scatter plot graphic seems more sprawled, which the relation between industrial structure and media market is more complex. For instances, Shanxi (Taiyuan) got high grade in the industrial structure but low in media market. However, this doesn't mean the province has great potential in media development. The high grade in industrial structure results from its boom of coal industry, which obviously has little attraction to advertisement.

For urbanization, this study found that there is a fairly positive correlation between this indicator and media market. From a historical perspective, urbanization is an essential condition for mass media industry, for urbanization provides core audience to media and urban area attracts much more advertisement than rural area. In China, six provinces or minority or Autonomous Region of Minority Nationalities have great potential for media industry in the urbanization sense. They are Inner Mongolia, Fujian, Chongqing, Tianjin, Jilin.

For per capita disposable income and per capita consumption expenditure, this study found positive correlation between those two indicators and media market, especially. Tianjin and Fujian are exceptions in both two indicators, which means there are potential for the two to develop media industry.

All the provinces are clustered according their scores in CMDI into 3 groups: the first group are the leading regions of Beijing, Shanghai, Guangdong, Zhejiang, Jiangsu and Shandong, characterised by a developmental model of harmonious relationship of media and its environment. The second group has 13 provinces and the third group has 12 provinces. The ranking system of CMDI shows different performances in media development in a comprehensive way.



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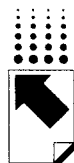
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# 报告概述



## 中国传媒发展指数的指标框架 与定量测评

《中国传媒发展指数》课题组\*

中国传媒产业研究近 20 年来引入了大量微观和宏观经济分析的手段,形成了多样化的研究视角,但是结合经济元素和文化、政府政策对传媒业进行考察的“多学科型”研究仍处于弱势段<sup>①</sup>,实际上传媒业的发展从来也不可能离开其存在的环境,作为上层建筑的一部分和市场法人,传媒业与国民经济发展息息相关,是依附性、派生性很强的产业。有鉴于此,中国人民大学新闻与社会发展研究中心与中国人民大学新闻学院组建的《中国传媒发展指数》课题组,在理论逻辑和实证研究的架构下,提出“传媒发展指数”这个概念,从系统依赖的角度考察传媒经济的发展及其社会性、环境性的制约因素。

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\* 本课题组由中国人民大学新闻与社会发展研究中心和中国人民大学新闻学院联合组建,课题组的负责人为喻国明教授。本研究报告的执笔人为喻国明、苏林森、王春枝、王斌,中国人民大学新闻学院 2006 级传媒经济专业方向的硕士研究生参与了本课题的资料采集、整理和部分研究工作。

① Robert G. Picard、杭敏:《传媒经济学研究的历史、方法与范例》,《现代传播》2005 年第 4 期。



## 一 理论背景及定位

传媒发展指数这一概念的提出动因源自三个方面。

第一是对传媒产业在社会经济系统中的结构性还原。传媒产业作为文化产业、创意产业及信息服务业的身份逐渐得到普遍认可，但相应的产业分析和产业预测却始终未能像快速消费品、金融、电子产品等其他行业一样达到成熟和系统化的程度。这不仅见之于零乱的数据和只抓冰山一角的各类报告，更见之于传媒产业研究工具和逻辑的匮乏，最大的问题在于传媒业自身发展的碎片化和对这种碎片化现状进行描述及解析的无力感。传媒发展指数的首要含义就是对传媒业在国民经济中的比重、增长速度、主要关联行业等作出明确的判断，对传媒产业在国民经济环境中的区位作出清晰的图绘。

第二是对传媒业发展要素的有序厘清。传媒业的繁荣与否可以用多项指标来衡量，但这些要素起作用的层次有所不同。就报业盈利增长放缓的现象来讲，造成传媒经营风险的原因，远比人们直观感受到的要复杂得多。在大概概念上，这些原因可以分为传媒部门自身和媒体经营环境两大类。前者既归因于媒体部门自身收入结构不合理、产品结构不完善和竞争策略不领先等，也归因于政府主管部门的配合不力乃至监管不当。后者涉及的范围更广。生活方式的变革、消费品市场竞争的此消彼长、宏观经济调控的政策性安排，以及社会文化创意环境、社会教育制度的发展等，都可能对传媒经营的波动带来或强或弱的影响。这意味着，在制定媒体发展战略时，我们不仅要广泛涉猎社会经济环境的动态，更应强调对环境中影响传媒产业发展的因素有层次有重点的区分。

第三是对传媒发展因子的贡献分析。我国传媒产业自改革开放进入快车道以来，与社会生活和经济形势的结合更加紧密，经营环境更趋复杂，经营风险在增加。在分析传媒产业增长的过程中，当增长的各种表现被系统的归纳后，当其形成原因渐次被揭示出来后，当各类原因之间



错综复杂的相互关联被初步认识之后，人们就迫切需要找到一种更全面、更系统、更能精确刻画其增长本质的科学视角来对之加以分类和描述。传媒发展指数正是通过对各个因子的细绎和测度，来量化的展示各个因素对传媒业的重要程度和贡献大小。

由此我们可以归纳出传媒发展指数的核心内涵：不同的环境要素会对传媒组织和传媒业产生不同的约束并决定其选择空间，从而使得传媒组织的行为出现不同的增长特征和发展路径。所谓评价和改善传媒发展指数，即是要对现存的传媒产业结构进行有序的排查和厘清，采纳一系列精当而敏感的指标展示出传媒业的动态发展速度及质量，实现对传媒业与社会环境互动的有效监测，从而优化传媒组织、传媒业与其发展环境之间的匹配程度，形成正向激励机制，有效地抑制传媒发展战略的偏离，从把握机身状况和气候条件的大环境观来审视传媒产业的“腾飞”，而非仅仅改进驾驶员自身的一些作为。

如果沿用这一比喻，我们正好可以借以说明本书所指的传媒发展的范畴：飞机是各自运行的传媒组织，气候条件是搭载传媒业发展的社会环境，既包括各部类行业的群体经济行为所组成的国民经济发展态势，也包括生活形态、文明教养、民众心智等组成的社会发展水平。媒体面和承载其发展的社会环境面是把握传媒产业增长的两个基本角度。

传媒发展指数的界说对于传媒产业的现实运作也具有操作性的功效。

第一，传媒发展指数的概念将推演出传媒产业的联动结构和制约框架。由于传媒业的前景广阔，投资者不断加强对传媒版块的分析 and 预测，但是目前所见的研究往往基于传媒自身的经济状况，通过历年来我国媒体的广告及收入增长的纵向趋势和与美欧诸国比较的横向趋势来预测传媒业的增长。但问题的关键在于，传媒经营增长的社会链条客观上延伸到相应的其他行业（房地产、印刷、电视机、电信等）并受到这些行业景气情况和发展状况的显著影响。只有对这些层次进行严密的叠





加和综合分析,才能得出理性的、有信服力的预测,才能发掘传媒业寒冬或暴发式增长等大波动背后的水面下的“冰山”,才能体现作为文化产业、信息服务业的传媒深刻依赖于社会发展进程的“蝴蝶效应”逻辑。

第二,是对传媒产业增长机会点的真实发现。近几年来传媒业涌现出了一批实力雄厚、管理有效的标杆组织,这些试水者对于推动整个产业的素质有积极的作用。但由于我国传媒业自身的特殊定位,无法完全地复制国外媒体和国内工商企业的经营理念 and 做法,而基于媒体行业的深入的前景调研又过于稀缺,因此追求管理时尚就成为通行的提高媒体运营效率的杀手锏。这些议题可能对于现阶段的中国传媒业还是伪问题,而我们有限的财力和人力应当去应对媒体行业所面临的真实的潜在需求,无论是产品还是服务。这些需求和机会来自扎根于中国社会的对信息流动和资讯消费的深刻剖析。传媒发展指数试图把人口年龄结构、可支配消费能力、地方创新氛围、广告吸纳程度等更多的变量纳入传媒增长框架中来考察。传媒发展指数企望引入全面的系统的环境因素来看传媒增长趋势,其新贡献在于从事实和数据背后寻找真问题和真机会,据此刻画传媒产业成长的弹性空间。

从这个视角出发,传播学中的赖利夫妇、梅尔文·德弗勒与桑德拉·鲍尔-洛基奇,以及北美的媒介环境学都有过类似的思想表达,国内也有少数学人进行过一些实证尝试,比如中国人民大学新闻学院丁汉青在其博士论文《广告流:理论与实证研究》中,分析了广告与各地经济的关系、广告与相关产业经济景气状况的关系;中国人民大学硕士胡春磊在他的硕士论文中考察了媒介经济与宏观经济的关系。这些研究在传媒的产业生态上取得了一些“点”的突破,但是“面”上的研究,目前还是空白。

从以上回顾可以发现,系统的、有机的、结构性的观察传媒与各种社会力量的连接关系是传播研究的一脉相承的丰富思想遗产。这种动态的、多元的视角对于摆脱媒介中心论的分析和解说颇具借鉴意义。在面