

China Media Facts

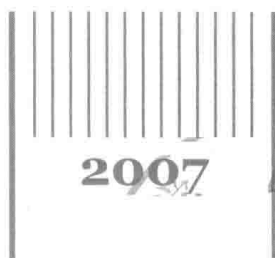
English Version
Included

2007
中国媒介手册



中国媒介手册

CHINA MEDIA FACTS



中国媒介手册2007

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《中国媒介手册》

央视—索福瑞媒介研究有限公司

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人民币 ￥499

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▶ 个人资料 PERSONAL DATA

姓名 Name	证件号码 Identity Card Number
血型 Blood Type	护照号码 Passport Number
办公地址 Office Address	
办公电话 Business Telephone	传真 Business Fax
家庭住址 Home Address	
邮编 Postcode	
家庭电话 Home Telephone	手机 Mobile
电邮 E-mail	MSN
车牌号 Car Registration Number	
其它 Others	

▶ 重要电话号码 IMPORTANT TELEPHONE NUMBERS

▶ 重要资料 IMPORTANT INFORMATION

▶ 提示 REMINDERS

► 2007

► JANUARY

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序

公元2007年【公历】，丁亥年【农历】；承袭、暗合着华夏古文明的智慧、祥瑞、吉庆。

贞观之治恰逢丁亥猪年，“金铢年”由于财富之盛而得名，于是必有祥瑞之事发生的丁亥火猪年自此被改称为丁亥金猪年。

公元207年，刘备三顾茅庐，诸葛亮出隆中；

妈祖于公元987雍熙四年得道成仙；

永乐五年，北京城始建；

……

智慧、祥瑞、吉庆——行业发展，逢此吉时，夫复何求？

中国传媒业发展从竹书简帛到纸香墨飞，从村村“触电”到“一网情深”，着实已经换了几重天。2006年5月，第七届世界传媒经济学术会议的主题“传媒产业：全球化·多样性·认同”，一题中的——提点出了今时今日中国传媒业，甚至全球传媒业的主题。

如果说1840年鸦片战争使得中国人睁眼看世界，还有几分兵临城下的无奈，那么时下中国发展与国际市场对接，中国传媒业发展并入全球传媒业发展的轨迹，就已经不失海纳百川的包容，壁立千仞的自主、自信与自省。行业发展意气风发、移步换景、大浪淘沙，在中国传媒业的这块版图上，媒介调查业意欲何为？

一位涉足互联网多年的行家曾经这样评点硅谷的成功——硅谷有钱、硅谷有创意、硅谷深谙游戏规则，这也道出了创投的实质，从投资到执行，创意与游戏规则的明晰都一定程度最小化了创投风险。就此CSM在中国传媒业发展的纵横捭阖中也找到了自己的坐标，依托中外合资的背景，拥有“师夷长技”的先天优势，而又不失本土化的禀赋，因而CSM为有志于投资、涉足中国传媒业的各方提供了一站式的行业调查服务，从而降低了“入行”与投资的机会成本。

走过2006年，步入2007年，从央视高调涉足手机电视平台到默多克退出中国传统媒体市场，中国移动战略入股凤凰卫视；资源整合、品牌传播、传媒影响力、传媒创造力拨动着行业发展之弦。从高瞻远瞩到解决方案，CSM唯望以偏居一隅的达观、超然、冷静与警省探得中国传媒业的一方洞天。

《中国媒介手册》2007作为独家的年度性行业手册，并不奢望被奉为行业发展的奎臬，却以“桃李不言，下自成蹊”的本分与殷切，祝愿所有为中国传媒业“托市”的有识之士一路好运。

央视—索福瑞媒介研究总经理

Preface

2007 is known as "Ding Hai" or the year of the "Golden Pig" in the Chinese Lunar calendar. According to Chinese Folklore, this is an event that occurs only once every 600 years. The Pig symbolizes courage, thoughtfulness and loyalty with many famous events occurring during this auspicious "Ding Hai" year over the course of history. For example, the construction of Beijing began in a Ding Hai (Yongle fifth) year. We look forward to a 2007 filled with good fortune and prosperity for all.

China's media industry has undergone a transformation, starting from books copied on bamboo and silk to paper and ink and with people now chatting to each other over the internet. In May 2006, the 7th global media economy conference themed "Media industry: globalization, diversification, and alignment" pointed out the importance of China's present day media industry as the key topic within the global media industry.

If the Opium War in 1840 caused the Chinese people to see the outside world with a bit of helplessness, at present China's development is closely tied to the international market. China's media industry is integrating itself into the global media industry and keeping pace with global developments and trends. It is more and more all-inclusive and tolerant while still strongly independent and self confident, featuring a strong emphasis continuous self examination. The media industry's development remains vibrant with excellent prospects ahead. Within this context a key question that we face is what role must we play as media researchers to best serve this rapidly evolving media environment.

An internet expert once commented that money, creativity and a familiarization with the rules of the game contributed to success of the Silicon Valley and also explains essence of investment in the creative and content industries. Rules of the game help clarify objectives and the execution strategies necessary for achieving them, thus reducing investment risks. Utilizing CSM's Sino-foreign joint venture background and expertise the company has leveraged its in-depth understanding of the local media market with cutting edge technological know-how provided by TNS to help those who want to invest in China's media industry at the same time creating a one-stop shop for media research services. This will help customers to reduce the barriers to "entry" and the opportunity costs of investing in China's media market.

In the past 12 months and into 2007, CCTV decided to invest aggressively in the mobile television market; Rupert Murdoch and his News Corporation withdrew from China's traditional media market; China Mobile became the strategic shareholder of Phoenix Satellite TV aiming to share resources and integrate content and brand communication. All of these strategies are creating synergy and momentum within the media industry. Our goal is for CSM to offer you our unique insights into China's media market from a third party perspective.

"China Media Facts" 2007 - the 4th edition of this book is an annual CSM Media Research exclusive publication, a tool and guide for insight into China's media market from China's leading audience measurement research company. We're proud to share our latest research results with you in this fact book which includes key data about China and a comprehensive picture of TV & radio ratings, viewing demographics, audiences' favorite programming and content as well as sports marketing research information from markets all around China. We hope it serves as a convenient and practical guide for media and advertising professional as well as all members of media related enterprises. We wish you all the best of luck, and hope you enjoy the publication.



Managing Director
CSM Media Research

CSM Media
Research

10th

引领

受众研究，数据点亮十年！

Empowering China's Media Development,
Generating Cross Industry Synergy via Partnership



服务中国媒介行业10年
Serving China's Media Industry for 10 Years

www.csm.com.cn

[创新与研究]

Research Capability & Innovation

CSM 媒介研究有限公司是国内最大的市场研究公司—央视市场研究股份有限公司(CTR)与世界上排名第二的领先的市场研究集团TNS合作成立的中外合资公司, 成立于1997年12月4日。

- CSM是中国电视收视率调查的领导者, 我们拥有世界上最大的测量仪收视调查网络。
- CSM是收听率调查行业的领跑者, 建立了独立于电视收视调查网的广播收听调查网络。
- CSM于2003年在中国率先推出崭新的体育赞助评估研究服务。
- CSM根据国内外客户不同需求, 提供与媒体相关的媒介专项调研咨询服务。
- 我们是一专业的媒介数据提供商, 研究传媒产业发展的权威。
- 我们的理念—高科技、现代化的运营和人性化的服务。
- 我们独特的核心竞争力—创新和研究能力。
- 我们的质量方针—公正、透明、及时、准确。
- 我们是一中国境内调查业中首家通过ISO9001—2000版国际质量体系认证标准的企业。
- 我们的愿景—追求全新的高科技的调查方法以满足传媒行业数字化的发展以及市场与客户日益变化的需求。

CSM is a joint venture between China's largest market research company—CTR Market Research and the world's second largest market research company—TNS Group. It was founded on December 4th, 1997.

- CSM is the leader of TV audience measurement in China. CSM operates the world's largest PeopleMeter TV audience measurement panel.
- CSM pioneered radio audience measurement in 2000 and CSM has built an independent RAM network in China.
- CSM has taken the lead in introducing Sports Marketing Research since 2003. CSM provides Customized Media Research to meet the different needs of both national and international clients.
- We are the professional media data provider; research authority in media industry development.
- Our philosophy—high-tech and modernized operation and friendly service.
- Our core competence—research capability and innovation.
- Our quality standard—Equitable, Transparent, Timely & Accurate.
- We are the first market research firm in China with ISO9001—2000 Certification.
- Our purpose—explore bran-new and high-tech research methodology to meet the digital development of media industry.

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第一部分
中国概况
China Overview

中国概况

China Overview

2005年全国及各省、自治区、直辖市总人口和生产总值 Total Population and Gross Domestic Product By Region(2005)

No.	地区	Region	年底总人口(万人) Total Population Year-end (10 000 persons)	地区生产总值(亿元) Gross Region Product (100 million yuan)	No.	地区	Region	年底总人口(万人) Total Population Year-end (10 000 persons)	地区生产总值(亿元) Gross Region Product (100 million yuan)
1	全国	National Total	130,756	183,085	17	河南	Henan	9,380	10,587
2	北京	Beijing	1,538	6,886	18	湖北	Hubei	5,710	6,520
3	天津	Tianjin	1,043	3,698	19	湖南	Hunan	6,326	6,511
4	河北	Hebei	6,851	10,096	20	广东	Guangdong	9,194	22,367
5	山西	Shanxi	3,355	4,180	21	广西	Guangxi	4,660	4,076
6	内蒙古	Inner Mongolia	2,386	3,896	22	海南	Hainan	828	895
7	辽宁	Liaoning	4,221	8,009	23	重庆	Chongqing	2,798	3,070
8	吉林	Jilin	2,716	3,620	24	四川	Sichuan	8,212	7,385
9	黑龙江	Heilongjiang	3,820	5,512	25	贵州	Guizhou	3,730	1,979
10	上海	Shanghai	1,778	9,154	26	云南	Yunnan	4,450	3,473
11	江苏	Jiangsu	7,475	18,306	27	西藏	Xizang	277	251
12	浙江	Zhejiang	4,898	13,438	28	陕西	Shaanxi	3,720	3,676
13	安徽	Anhui	6,120	5,375	29	甘肃	Gansu	2,594	1,934
14	福建	Fujian	3,535	6,569	30	青海	Qinghai	543	543
15	江西	Jiangxi	4,311	4,057	31	宁夏	Ningxia	596	606
16	山东	Shandong	9,248	18,517	32	新疆	Xinjiang	2,010	2,604

数据来源: 中国统计年鉴2006 Data Source: China Statistical Yearbook 2006

中国概况

China Overview

2005年中国广告业发展状况 China Advertising Development(2005)

No.	项目	Item	数量	Number	年增长率%	Yearly Growth Rate%
1	营业额 (万元)	Revenue (10 000yuan)	14,163,487		12	
2	经营单位 (户)	Number of Institutions (household)	125,394		11	
3	从业人员 (人)	Number of Employed persons (person)	940,415		3	

数据来源: 中国广告年鉴2006 Data Source: China Advertising Yearbook 2006

中国概况

China Overview

2005年全国广告经营单位发展状况 Development of National Advertising Institutions(2005)

No.	项目	Item	户数(户) Number (household)	户年增长率% Yearly Growth Rate%	占总户数比例% Percentage to Number%	营业额(亿元) Revenue (100 million yuan)	营业额年增长率% Yearly Growth Rate%	占总营业额比例% Percentage to Revenue%
1	广告公司	Advertising Enterprise	84,272	11	67	615	9	44
2	兼营广告企业	Enterprise Involved In Advertising Business	16,575	27	13	57	24	4
3	电视台	Television Firm	2,800	2	2	355	22	25
4	电台	Broadcasting Firm	919	29	1	39	18	3
5	报社	Newspaper Office	1,845	-6	2	256	11	18
6	杂志社	Magazine Office	4,056	1	3	25	22	2
7	其他	Others	14,927	1	12	69	11	5
8	合计	Total	125,394	11	100	1,416	12	100

数据来源: 中国广告年鉴2006 Data Source: China Advertising Yearbook 2006

中国概况

China Overview

2005年全国及各省、自治区、直辖市广告营业额 Advertising Revenue by Region(2005)

No.	地区	Region	营业额(万元) Revenue (10 000yuan)	年增长率% Yearly Growth Rate%	占总额比例% Percentage to Total Revenue%	营业额排序 Ranking
1	北 京	Beijing	2,515,576	4	18	2
2	天 津	Tianjin	527,801	17	4	7
3	河 北	Hebei	87,393	-12	1	23
4	山 西	Shanxi	141,259	134	1	18
5	内 蒙 古	Inner Mongolia	38,193	32	0	26
6	辽 宁	Liaoning	455,363	27	3	8
7	吉 林	Jilin	131,380	5	1	20
8	黑 龙 江	Heilongjiang	171,865	1	1	16
9	上 海	Shanghai	2,664,690	18	19	1
10	江 苏	Jiangsu	906,323	-6	6	5
11	浙 江	Zhejiang	956,970	15	7	4
12	安 徽	Anhui	226,023	2	2	14
13	福 建	Fujian	360,925	19	3	9
14	江 西	Jiangxi	163,354	15	1	17
15	山 东	Shandong	611,084	7	4	6
16	河 南	Henan	229,651	0	2	13
17	湖 北	Hubei	263,469	35	2	12
18	湖 南	Hunan	208,724	72	2	15
19	广 东	Guangdong	2,346,230	11	17	3
20	广 西	Guangxi	115,448	10	1	21
21	海 南	Hainan	32,606	19	0	27
22	重 庆	Chongqing	271,022	12	2	11
23	四 川	Sichuan	295,371	47	2	10
24	贵 州	Guizhou	76,419	695	1	24
25	云 南	Yunnan	136,536	14	1	19
26	西 藏	Xizang	18,456	2	0	30
27	陕 西	Shaanxi	38,883	-54	0	25
28	甘 肃	Ganxu	30,359	-27	0	28
29	青 海	Qinghai	11,000	-8	0	31
30	宁 夏	Ningxia	23,922	73	0	29
31	新 疆	Xinjiang	107,192	-7	1	22
32	合 计	Total	14,163,487	12	100	-

数据来源: 中国广告年鉴2006 Data Source: China Advertising Yearbook 2006

中国概况

China Overview

2005年全国各类广告投放 National Advertising Spending(2005)

No.	类别	Category	投放额(亿元) Gross Spending (100 million yuan)	年增长率% Yearly Growth Rate%	占总额比例% Percentage to Total Revenue%
1	药品	Medicines	141	15.3	10.0
2	食品	Food	137	28.0	9.7
3	房地产	Real Estate	128	1.7	9.0
4	化妆品	Cosmetics	112	28.8	7.9
5	家用电器	Household Appliances	77	1.2	5.5
6	医疗服务	Medical Service	76	23.0	5.4
7	汽车	Motor Vehicles	70	18.9	5.0
8	保健食品	Health food	52	7.4	3.6
9	服务	Service	48	34.9	3.4
10	酒类	Liquor	46	24.5	3.2
11	其他	Others	530	5.1	37.3
12	合计	Total	1,416	12.0	100.0

数据来源: 中国广告年鉴2006 Data Source: China Advertising Yearbook 2006



逐浪中国**数字化**潮流 致力**新媒体**受众研究

引领受众研究 沟通传媒价值

Empowering China's Media & Advertising Development
Generating Cross Industry Synergy via Partnership

最广泛的覆盖 最先进的技术 人性化的服务

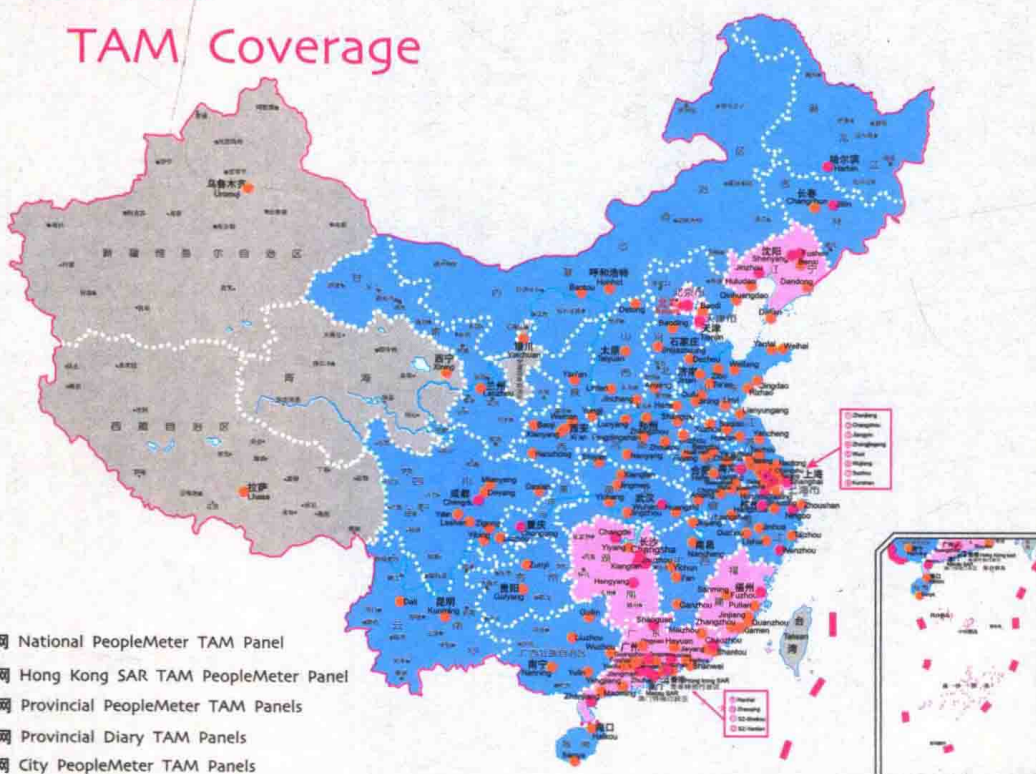
Comprehensive Coverage ■ Cutting-edge Technology ■ Personalized Service

CSM是国内最大、最权威的生产收视率数据的专业媒介研究公司。拥有世界上最大的测量仪收视调查网络，推及全国11亿9千多万4岁以上电视观众的收视行为。全国调查样本地区达到260个市（县）、调查网覆盖4.5万余户家庭、超过14.9万样本人口，对全国24个省和169个城市的1,297多个主要电视频道的收视情况进行全天候不间断地监测。截至到2007年2月底，CSM已经建立了1个全国测量仪收视率调查网，1个香港测量仪收视率调查网，4个省级测量仪收视率调查网，41个市级测量仪收视率调查网，20个省级日记卡收视率调查网和127个市级日记卡收视率调查网。在这个网络中，有近600位全职人员全心为您提供电视收视调查服务。CSM使用的最新的人员测量仪能够监测最新的数字化电视收视情况并将成为未来收视调查的趋势。

CSM is China's largest and most authoritative professional TV rating data provider. CSM operates the world's largest PeopleMeter TV audience measurement panel, which covers more than 260 cities (counties), 45,000 homes and 149,000 persons, providing viewing data for 24 provinces and 169 cities, measuring over 1,297 main channels all day, every day of the year. Now, CSM has established 1 national PeopleMeter panel, 1 Hong Kong PeopleMeter panel, 4 provincial PeopleMeter panels, 41 city PeopleMeter panels, 20 provincial diary panels and 127 city diary panels. Around 600 full-time professional staff are dedicated to serving and meeting your needs in the dynamic media market in China. CSM's PeopleMeter technology is "future proof" and is capable of measuring digital TV across China today. are dedicated to serving and meeting your needs in the dynamic media market in China.

CSM收视率调查网络

TAM Coverage



第二部分

电视收视率

Part Two TV Ratings