

China Media Facts

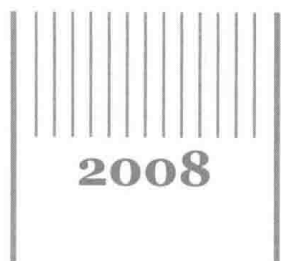
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2008
中国媒介手册



中国媒介手册

CHINA MEDIA FACTS



中国媒介手册2008

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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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► 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

▶ 2008

▶ JANUARY

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► 2007

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► 2009

► JANUARY

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²³ ₃₀	²⁴ ₃₁	25	26	27	28	29

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序

2008年，农历戊子年，依托经济平稳快速增长，借力奥运盛会托市，2008年的中国为世界所瞩目。历史上的鼠年总是不乏佳话，承袭历史的祥瑞，2008年中国再次迎来了向世界展示发展中的大国气度恢宏、英姿勃发的历史瞬间。

媒介市场的博弈有其行业的潜规则——融合、角逐、制衡、破局，这四个维度成就了媒介市场“万物毕同毕异”的发展格局。奥运盛会的蓄势激扬了媒介市场多元力量的竞合博弈。2007年12月，国际奥委会与中央电视台签订了“2008年奥运会中国地区互联网和移动平台传播权”协议。此举是国际奥委会首次将互联网、手机等新媒体作为独立转播机构，与传统媒体一起列入奥运会的转播体系。按照北京奥组委对国际奥委会的承诺，在2008年将用地面无线覆盖为各地提供奥运会高清节目，这无疑为数字电视的发展提供了动力。一系列的举措不失时机地传达出这样一个敏感的讯息——新媒体蓄势待发，以正规军的身份加入到媒介市场攻城略地的博弈中来。

根据广电总局公布，我国目前已形成了有线、无线、卫星、互联网等多种技术手段并用的广播电视传播网络。而数字、网络等信息技术的快速发展，正推动着广播电视、通信、互联网都向下一代转换，三网融合的趋势越来越明显，同时也催生出了网上广播影视、IP电视、移动多媒体广播电视、手机电视等多种新的媒体形式。当传播渠道不再是稀缺资源，渠道、内容的合作与创新模式将成为传媒业探讨的主题。

对中国媒体进行投资最主要的风险包括政策风险、市场风险等。市场风险是媒体投资、广告投放都难以规避的话题。一定程度受蓄势奥运的影响，众多企业缩减2007年广告预算，2007年中国广告整体投放同比增幅仅9%，为近年来最低增幅。换一个角度思考，欲扬先抑，2008年中国媒体广告图景可期。

媒介行业发展对于降低投入风险的内在需求为CSM媒介研究的生存、发展找到了依托，晚清时候的商业巨擘胡光墉以“戒欺”自勉，如何以“公正透明、及时准确”的行业调查，为媒介市场竞争营造一个买卖公平、童叟无欺的业态环境是CSM始终不渝的追求。

《中国媒介手册2008》作为已经连续5年发布的独家行业手册，希望以客观、理性的视角，科学、准确的数据记录传媒产业一路发展沿革的思索与努力，谨祝跻身媒介市场的业界同仁为发展而开局，以同赢而共勉。

央视—索福瑞媒介研究总经理

Preface

In 2008, China will rely on continued steady and swift economic growth and the Beijing 2008 Olympic Games to attract the world's attention. Throughout history the year of the mouse has generated many charming stories. This year carries auspicious omens and 2008 in China was welcomed as a historically important year, one in which China will demonstrate that it is a developing great nation.

The media market remains framed by latent guidelines, namely integration, competition, conditionality, and innovation. These four dimensions are the key factors behind the media market's development. The Olympic effect has driven forward multiple strengths within the media market. In October 2007, the IOC and CCTV joined together to sign the "2008 Olympic Internet and Mobile Communication Platform Broadcasting Rights" agreement. This marks the first time that the IOC awarded broadcast rights for new media like the Internet and Mobile TV as independent media from the traditional media in the Olympic broadcasting system. According to BOCOG commitments, terrestrial networks will be in use in 2008 to provide the Olympic Games in high definition formats across many regions in China. This is part of the effort to drive digital TV developments in China. All of this information shows how seriously the industry is moving toward moving quickly into the new media environment, step by step.

China's SARFT information clearly indicates that China already has a vigorous broadcasting network with cable, wireless, satellite and internet broadcasting technically in place. Digital and internet developments will speed TV, Radio, Internet and communications developments to the next generation. The development trends of each are clearer, driving new media forms such as internet TV (online video), IPTV and Mobile TV. Now that the broadcasting platforms are in place the primary topics the industry is dealing with include channel management, content and the creative models that should be used across these new media.

The main risks of investment in China's media industry include policy associated risk as well as the usual overall market risks. Market risks are a normal topic for media investment and advertising launches. With the Beijing 2008 Olympics, many companies reduced advertising budgets in 2007, which resulted in a slower rate of growth in 2007 at about 9% for the advertising market overall. This is the lowest rate of growth in recent years. Yet this slow down should only have a temporary dampening effect with prospects for 2008 still strong for advertising investment increases.

Reducing the risks inherent in the media industry is the developmental foundation of CSM Media Research. Our focus remains to deliver an "Equitable, Transparent, Timely, Accurate" audience measurement service, creating a healthy environment for the media industry to work within for programming and advertising trading decision making.

The "China Media Fact 2008" handbook once again delivers a unique industry report and is now in its fifth year of publication. We utilize an objective and rational point of view based on accurate data driven by scientifically developed methodologies to support the media industry's development. We respectfully wish the media industry well and look forward to the continuing encouragement of one another to create winning development strategies.



Managing Director
CSM Media Research

CSM Media Research

引领

受众研究 沟通传媒价值

Media Industry's Preferred Research Partner

CSM

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[创新与研究]

Research Capability & Innovation

CSM 媒介研究是由国内最大的市场研究公司CTR和全球性的市场研究与资讯集团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 global market insight and information group - TNS. 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

2006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(2006)

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	131,448	210,871	17	河南	Henan	9,392	12,496
2	北京	Beijing	1,581	7,870	18	湖北	Hubei	5,693	7,581
3	天津	Tianjin	1,075	4,359	19	湖南	Hunan	6,342	7,569
4	河北	Hebei	6,898	11,660	20	广东	Guangdong	9,304	26,204
5	山西	Shanxi	3,375	4,753	21	广西	Guangxi	4,719	4,829
6	内蒙古	Inner Mongolia	2,397	4,791	22	海南	Hainan	836	1,053
7	辽宁	Liaoning	4,271	9,251	23	重庆	Chongqing	2,808	3,492
8	吉林	Jilin	2,723	4,275	24	四川	Sichuan	8,169	8,638
9	黑龙江	Heilongjiang	3,823	6,189	25	贵州	Guizhou	3,757	2,282
10	上海	Shanghai	1,815	10,366	26	云南	Yunnan	4,483	4,007
11	江苏	Jiangsu	7,550	21,645	27	西藏	Xizang	281	291
12	浙江	Zhejiang	4,980	15,743	28	陕西	Shaanxi	3,735	4,524
13	安徽	Anhui	6,110	6,149	29	甘肃	Gansu	2,606	2,277
14	福建	Fujian	3,558	7,615	30	青海	Qinghai	548	642
15	江西	Jiangxi	4,339	4,671	31	宁夏	Ningxia	604	711
16	山东	Shandong	9,309	22,077	32	新疆	Xinjiang	2,050	3,045

数据来源: 中国统计年鉴2007 Data Source: China Statistical Yearbook 2007

中国概况

China Overview

2006年中国广告业发展状况 China Advertising Development(2006)

No.	项目	Item	数量	Number	年增长率%	Yearly Growth Rate%
1	营业额 (万元)	Revenue (10 000yuan)	15,730,018		11	
2	经营单位 (户)	Number of Insitutions (household)	143,555		15	
3	从业人员 (人)	Number of Employed persons (person)	1,040,099		11	

数据来源: 中国广告年鉴2007 Data Source: China Advertising Yearbook 2007

中国概况

China Overview

2006年全国广告经营单位发展状况 Development of National Advertising Institutions(2006)

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	99,794	18	70	631	3	40
2	兼营广告企业	Enterprise Involved in Advertising Business	18,857	14	13	60	5	4
3	电视台	Television Firm	2,736	-2	2	404	14	26
4	电台	Broadcasting Firm	938	2	1	57	47	4
5	报社	Newspaper Office	1,832	-1	1	313	22	20
6	杂志社	Magazine Office	4,105	1	3	24	-3	2
7	其他	Others	15,293	2	11	84	22	5
8	合计	Total	143,555	14	100	1,573	11	100

数据来源: 中国广告年鉴2007 Data Source: China Advertising Yearbook 2007

中国概况 / China Overview

2006年全国及各省、自治区、直辖市广告营业额 Advertising Revenue by Region(2006)

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	2,888,889	15	18	1
2	天津	Tianjin	618,001	17	4	7
3	河北	Hebei	92,717	6	1	23
4	山西	Shanxi	163,390	16	1	18
5	内蒙古	Inner Mongolia	45,471	19	0	25
6	辽宁	Liaoning	516,222	13	3	8
7	吉林	Jilin	149,796	14	1	20
8	黑龙江	Heilongjiang	184,117	7	1	17
9	上海	Shanghai	2,656,091	-0	17	2
10	江苏	Jiangsu	1,260,433	39	8	4
11	浙江	Zhejiang	1,087,633	14	7	5
12	安徽	Anhui	256,226	13	2	13
13	福建	Fujian	412,764	14	3	9
14	江西	Jiangxi	192,352	18	1	16
15	山东	Shandong	708,912	16	5	6
16	河南	Henan	234,520	2	1	15
17	湖北	Hubei	235,809	-10	1	14
18	湖南	Hunan	302,900	45	2	11
19	广东	Guangdong	2,429,041	4	15	3
20	广西	Guangxi	142,822	24	1	21
21	海南	Hainan	31,432	-4	0	28
22	重庆	Chongqing	278,944	3	2	12
23	四川	Sichuan	347,945	18	2	10
24	贵州	Guizhou	76,419	0	0	24
25	云南	Yunnan	160,867	18	1	19
26	西藏	Xizang	19,426	5	0	30
27	陕西	Shaanxi	37,155	-4	0	26
28	甘肃	Ganxu	36,498	20	0	27
29	青海	Qinghai	15,698	43	0	31
30	宁夏	Ningxia	24,557	3	0	29
31	新疆	Xinjiang	122,970	15	1	22
32	合计	Total	15,730,017	11	100	

数据来源: 中国广告年鉴2007 Data Source: China Advertising Yearbook 2007

中国概况 / China Overview

2006年全国各类广告投放 National Advertising Spending(2006)

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	房地产	Real Estate	160	25.5	10.2
2	药品	Medicines	149	5.6	9.5
3	食品	Food	136	-0.8	8.6
4	化妆品	Cosmetics	109	-2.3	6.9
5	医疗服务	Medical Service	98	28.6	6.2
6	汽车	Motor Vehicles	97	37.2	6.1
7	家用电器	Household Appliances	89	14.5	5.6
8	保健食品	Health food	64	23.8	4.1
9	服务业	Service	61	27.9	3.9
10	信息产业	Information Industry	52	33.6	3.3
11	其他	Others	559	4.1	35.5
12	合计	Total	1,573	11.1	100.0

数据来源: 中国广告年鉴2007 Data Source: China Advertising Yearbook 2007

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

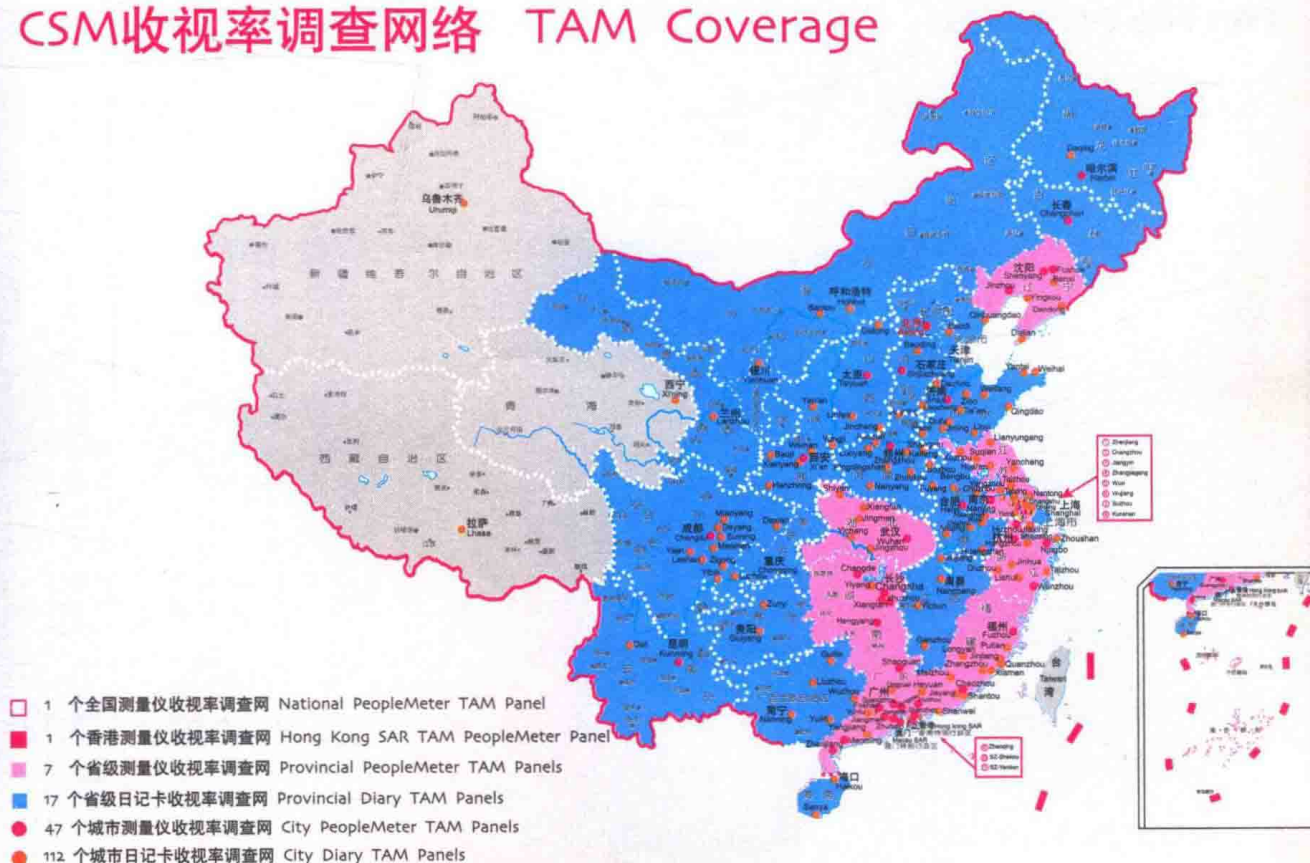
最广泛的覆盖 最先进的技术 人性化的服务

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12亿2千多万4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5.4万余户家庭、超过17.8万样本人口，对全国24个省和160个城市的1,295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2008年5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，7个省级测量仪收视率调查网，47个市级测量仪收视率调查网，17个省级日记卡收视率调查网和112个市级日记卡收视率调查网。在这个网络中，有近800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), 54,000 homes and 178,000 persons, providing viewing data for 24 provinces and 160 cities, measuring over 1,295 main channels all day, every day of the year. Now, CSM has established 1 national PeopleMeter panel, 1 Hong Kong PeopleMeter panel, 7 provincial PeopleMeter panels, 47 city PeopleMeter panels, 17 provincial diary panels and 112 city diary panels. Around 800 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