

TV in China

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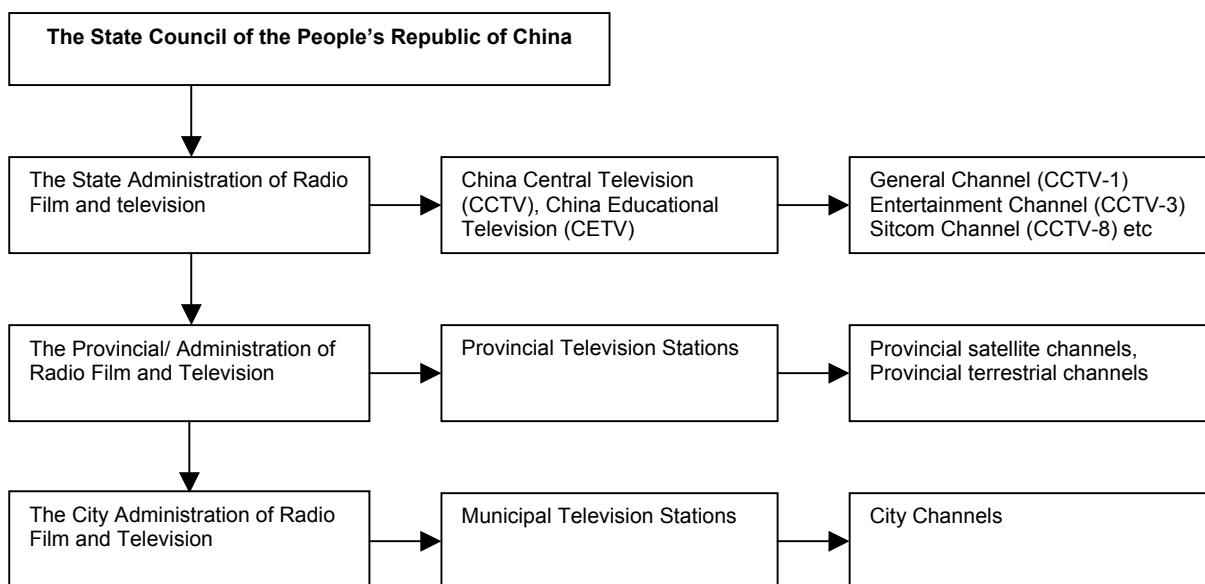
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1. Cooperation with TV Channels in China

Having provided quality market analysis and recommendations to TV companies such as Constantin and Plazamedia in the past, Marianne Friese Consulting GmbH is in an excellent position to connect with TV institutions at the highest levels. In the past, MFC has cooperated with top-level officials at CCTV, China’s state TV channel. Here, management-level meetings and discussions were arranged with a view to future cooperation. Through our own contacts and media relations partners, we are also able to reach out to municipal and provincial TV stations such as BTV (Beijing TV) and Shanghai TV. Close relationships with producers and suppliers allow us to target specific TV stations and formats in order to deliver great cooperation results.

2. TV in China

I. Structure of China’s TV System



The State Administration of Radio, Film and Television (SARFT) supervises the TV industry across China. Accordingly, in each province there is a “Provincial Administration of Radio, Film and Television” which oversees the provincial TV stations. There is also similar governmental control at the municipal level. At state level, there are CCTV and China Educational TV station. For each province, there is one satellite channel and one or more terrestrial channels. Medium- to large-sized cities have their own municipal channels.

II. TV Market Development

Presently, China has around 370 million TV sets and TV audience coverage exceeds 95% of the population. China’s total advertisement market revenue in 2006 was RMB 387 billion (approx € 39 billion), with TV advertising accounting for 81%.

In 2006, the total number of TV viewers covered 95% of China’s population; of which 139 million households had access to cable TV, and 12.5 million households used digital TV. Digital TV viewership is expected to increase to 128 million by 2010.

The government encourages the development of pay TV channels, of which there are now around 200. These channels provide the audience with a new platform for TV programs. At state level, there are China Central Television (CCTV) and China Educational Television (CETV) with 16 channels and 3 channels respectively. At provincial level, there are 32 satellite channels and more than 100 regular channels. Presently, China has more than 2,000 city TV channels.

Entry into the China TV market is still quite limited with many restrictions to foreign players regarding program production and distribution.

III. China Central Television (CCTV)

At present, CCTV has one main channel and 15 specialized channels. All TV stations in China lie directly under the supervision of SARFT (State Administration of Radio, Film and TV). Because of CCTV's special position as the main state TV organ, the possible negative influence of its programs is carefully observed and evaluated.

IV. Other Channels

Because development levels of provincial and city TV stations vary, and the audiences in different regions have different lifestyles and cultural backgrounds, the ratings for different programs vary geographically. Generally, people in the Northwest and Northeast of China, where local TV stations are relatively weak, tend to watch more programs on CCTV. Conversely, people in the south prefer to watch provincial and city TV channels. The top ten viewership percentages for February 2007 can be found on the following pages.

V. Top Ten TV Viewership Figures, February 2007

Beijing

		Viewership
1. CCTV Spring Festival Party	CCTV	28.4%
2. Weather Report	BTV 1	17.2%
3. Beijing and Hong Kong New Spring Unity Celebration	BTV 1	9.4%
4. Beijing News	BTV 1	8.9%
5. Year on Year – New Year Report	CCTV	8.7%
6. 100 Flowers Literary Spring Festival Celebration	CCTV 3	7.4%
7. A night with the stars	CCTV 2	7.2%
8. Treasure Hunt	CCTV 6	7.0%
9. Central News rebroadcast	BTV 1	6.9%
10. Legal News report	BTV 3	6.6%

(BTV – Beijing TV)

Chengdu

		Viewership
1. CCTV Spring Festival Party	CCTV	22.4%
2. 30 Minutes of Gold	Sichuan TV 2	5.6%
3. Secret Service	CTV 4	4.4%
4. Zhen Guan Chang Songs (9-40)	CCTV	4.2%
5. Unveiling Ceremony: Chengdu - China's best travel city	CTV 1	4.1%
5. 100 Flowers Literary Spring Festival Celebration	CCTV 3	4.1%
7. Happy 21	Sichuan TV 2	4.0%
8. Extraordinary Topics	Sichuan TV 2	3.9%
8. Special New Year Celebration Report	CCTV 3	3.9%
10. "One Song Together" Performance show	CCTV 3	3.8%

(CTV – Chengdu TV)

Guangzhou**Viewership**

1. "Break the Siege" TV series	Jadeite TV	23.2%
2. "Ten Brothers" TV series	Jadeite TV	18.9%
3. "Marriage for Fortune"	Jadeite TV	18.5%
4. Guangzhou Spring Festival Celebration	GTV	16.7%
5. "Fighting to be the Master" TV series	Jadeite TV	14.5
6. Roomful of Guests	Jadeite TV	13.5%
7. Women's Kitchen Spring Festival Party	Jadeite TV	13%
8. "Xue Ren Gui" Tv Series	GTV	12.1%
9. Serious Legal Cases	Jadeite TV	11.8%
10. Local Groom, Foreign Bride	Guangdong TV	11.7%

(GTV – Guangzhou TV)

Shanghai**Viewership**

1. CCTV Spring Festival Party	CCTV	14.3%
2. News Insight	STV	10.5%
3. News Report	STV	9.6%
4. In the Audience	STV	8.6%
5. "Nursemaid" TV Series	STV	7.9%
6. East 110	STV	7.6%
7. "The New Shanghai Shores" TV Series	STV	7.5%
7. 1/7	STV	7.5%
9. Weather Report	STV	7.4%
10. "Stepfather" TV Series	STV	7.3%

(STV – Shanghai TV)