



**China Advertising Industry Report,  
2010-2011**

**July 2011**

## ***This report***

- ◆ **Analyzes the market environment of advertising industry in China.**
  
- ◆ **Focuses on online advertising, newspaper and periodical advertising, outdoor advertising, TV and broadcast advertising and wireless advertising.**

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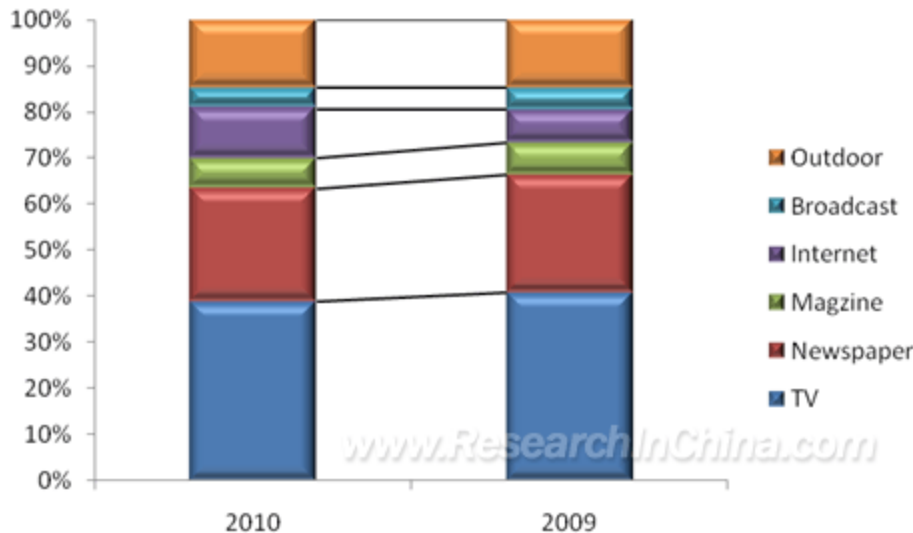
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## Abstract

The sustained economic growth ensures the healthy development of advertising industry in China. The advertising market size of China totaled RMB343.7 billion in 2010, up 22.5% from a year earlier. However, influenced by related policies and advertisers' preferences, each market segment presented different growth rates.

Concerning market segments, TV advertising with the market size of RMB133.1 billion still remained the largest segmented market of advertising industry. Yet, the development of TV advertising has been suppressed by online video advertising, which allures many TV stations successively into the online video market.

**Market Shares of Top 6 Media in China's Advertising Industry, 2009-2010**



Source: ResearchInChina

In 2010, the market size of online advertising kept the most rapid growth and reached RMB38.7 billion in China, an 87% YoY rise. In particular, video, search engine, and community were the top 3 advertising channels with the highest growth rate. In this year, the market size of online video advertising hit RMB 2.1 billion, up 157.1% YoY; and the operating income of key video websites including Youku, Tudou and Letv saw the YoY growth rates of 153%, 97.6% and 82.4%, respectively.

The growth rate of outdoor advertising was only second to that of online advertising market in China in 2010, and it increased by 23% YoY to RMB50.43 billion. The rapidly growing media distribution such as advertisement in the buses, subways and elevator rooms accelerated the development of outdoor media. Beijing Bashi Media is primarily focused upon advertising on public transportation and its operating income of advertising business in 2010 rose 29.7% against the previous year. As for Vision China Media, it boasts China's largest mobile TV advertising broadcast network which covers both buses and subways. In Apr. 2011, Vision China Media continued to consolidate its business in Northeast China, acquiring a 3-year exclusive advertising right for the mobile TV on public transportation in Shenyang city, Liaoning province, China.

In 2010, the broadcast TV and print media advertising market kept steady growth in China, up 15.2% and 17.8% YoY respectively. However, being beaten by online advertising and outdoor advertising, the market shares of broadcast TV and print media advertising in the total advertising market dropped 3.3 and 1.2 percentage points respectively.

With the approach of 3G era, the prevalence of smart terminal such as smart phone and tablet PC as well as rapid evolution of wireless advertising market will promote the diversification of advertising industry in China.

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