China TV Shopping Industry Report, 2011

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China) and China General Chamber of Commerce etc.

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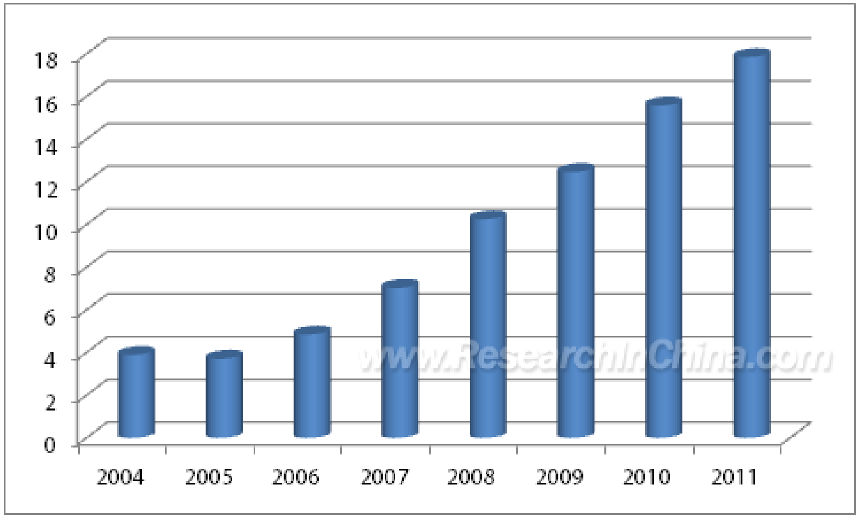
Abstract

TV shopping entered China in the early 1990s, and ushered in its first golden era from 1996 to 2000, during which, there emerged more than 1,000 TV shopping companies, with industry revenue already above RMB20 billion. However, since 2000, affected by exaggerated or false advertisement, exorbitant price, inferior quality and lack of after-sale services, this industry experienced rapid shrinkage, by 2005 merely less than 300 companies were left, and the revenue even dived to around RMB3.71 billion.

Due to the intervention from the State Administration of Radio, Film and Television (SARFT), State Administration for Industry and Commerce (SAIC) and other departments, which took joint action to regulate the TV home shopping industry, from 2006, the industry has seen continuous, vigorous growth, with sales up to RMB17.85 billion in 2011.

Market Size of China TV Shopping Industry, 2004-2011 (RMB bn)



Source: ResearchInChina

TV shopping enterprises directly invested by TV stations don't need to buy advertising time, thereby relying on low cost, they are gradually expanding media coverage and acquiring more market share. Whereas, those with traditional forms of advertising have witnessed an increasing shrinkage in market share due to the consistently rising expenses of advertising as well as terrible consumption experience.

China TV Shopping Industry Report, 2011 by ResearchInChina mainly covers the following content:

Development of foreign and domestic TV shopping industry, covering industrial chain, industry status, market size, operation mode, competitive features & pattern, development trends, etc.;

Research on key TV shopping operators in China, involving operation and development status of nine enterprises like HappiGo, Oriental CJ and Acorn International.

As one of the largest TV shopping platforms in China, HappiGo was incorporated by Radio, Film & TV Bureau of Hunan Province in 2006; since the inception, it has sold over 12 million pieces of commodities, with gross sales surmounting RMB9.4 billion, and television signals covering 16 provinces and three municipalities (Chongqing, Tianjin and Beijing) nationwide. As of end-2011, its television coverage has spread to over 60 million households. According to HappiGo's new strategy, it will take gradual step in converting from a TV shopping media into an all media retail enterprise, and is expected to obtain online shopping revenue leveling out that from the existing TV shopping business by 2013.

Oriental CJ is China's first home shopping channel, a joint venture by Shanghai Media & Entertainment Group and South Korea's CJ Group. With 14 regions in service, it has nearly 18.39 million audience nationwide. In March 2011, Oriental CJ received a standard national operating license from SARFT. For the next few years, it will continue to keep a strong foothold in the Yangtze River Delta region, and extend its influence to other regions of the country step by step.

As a large TV shopping company, Acorn International has programmed in 28 national satellite television channels as well as seven local channels in China. From 2008 to 2010, its total operating revenue surged from US$234 million to US$293 million; for the first three quarters of 2011, sales climbed 23.4% YoY to US$275 million. In future, Acorn International will proceed to strengthen its own product brands, meanwhile, to realize all media retail strategy via intensifying e-commerce channel.

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