



China TV Drama Industry Report, 2011-2012

Mar. 2012

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 the State Administration of Radio Film and Television etc.

Abstract

TV drama industry is a policy-sensitive sector in China. From 2006 to 2010, the value of Chinese drama transactions increased from RMB4.85 billion to RMB5.92 billion, with a CAGR of just 5.11%. As the relevant policies relax as well as a variety of supportive policies are issued, China TV drama industry has been developing rapidly. In 2011, the transacted value of dramas in China reached RMB7.6 billion, up 28.37% from a year earlier. Presently, Chinese TV dramas are oversupplied, while excellent works are still in short supply, with the prices ever rising.

In the field of drama production, there are numerous Chinese drama production institutions, with a low market concentration degree. By 2011, there had been 4,678 drama production agencies in China, of which top 10 ones only contributed 11% to the output.

Top 10 Film and Television Production Institutions and Their Market Share in China, 2011

Agencies	Number of TV Dramas	Proportion of TV Dramas	Number of Episodes	Proportion of Episodes
CCTV	10	2.1%	255	1.7%
Hairun Television Productions Ltd	7	1.5%	230	1.5%
Huayi Brothers Media Co., Ltd.	6	1.3%	161	1.1%
Beijing Hualu Baina Film & Television Co., Ltd.	5	1.1%	160	1.1%
Hunan TV & Broadcast Intermediary Co., Ltd.	5	1.1%	159	1.1%
Ba Yi Film Studio	5	1.1%	149	1.0%
Guangdong Southern TV Station	4	0.9%	140	0.9%
Anhui TV Station	4	0.9%	137	0.9%
Shanghai Film Group Corporation	4	0.9%	132	0.9%
Beijing Zi Jin Cheng Film Industry Co., LTD	4	0.9%	116	0.8%

Source: SARFT; ResearchInChina <China TV Drama Industry Report, 2011-2012>

At present, driven by the market demand, some powerful Chinese drama production institutions start to adopt the high-quality strategy. Through the innovations in production and marketing, they raise profitability effectively. Major companies have set foot in the capital market to provide financial support for the future development.

For TV drama production, Huayi Brothers employs the studio model, which runs flexibly. It can not only rapidly expand the production scale, but also enhance the TV drama quality. For marketing, Huayi adheres to the target marketing strategy, and actively explores overseas markets to seek new profit drivers.

In production, Huace introduces the creation model centering scripts and open production model to ensure view and enjoyment as well as market adaptability. As far as the marketing is concerned, Huace distributes its TV dramas by terrestrial and satellite TV stations, exclusive models, buyout models, pre-order models and customized models.

Hai Run will build film & TV bases in Beijing, Shanghai and Qingdao, and it will establish a performing arts training school to extend into the upstream industry chain for raising profitability. Moreover, it is also actively preparing for IPO in Hong Kong.

As for the TV broadcasting, TV stations are still the main broadcasting channels for TV dramas in China, with over 90% market share. Provincial TV stations have surpassed CCTV to become the most powerful TV drama buyers. Video websites and other new media have lower market share, but they develop quickly and have entered the oligopolistic competition stage. In 2010 and 2011, Youku, Tudou and Sohu TV ranked the top 3 by market share. Some video websites have begun to tap into TV drama production, extending towards the upstream industrial chain.

Restricted by China's various policies, the introduced foreign TV dramas have seen decline as a whole. However, some types of overseas TV dramas have witnessed fast growth. In 2011, Thailand dramas became popular in China quickly with high performance-price ratio, exceeding South Korean dramas to take the second place following Hong Kong dramas.

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