



# China TV Shopping Industry Report, 2013

Oct. 2013

## **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**

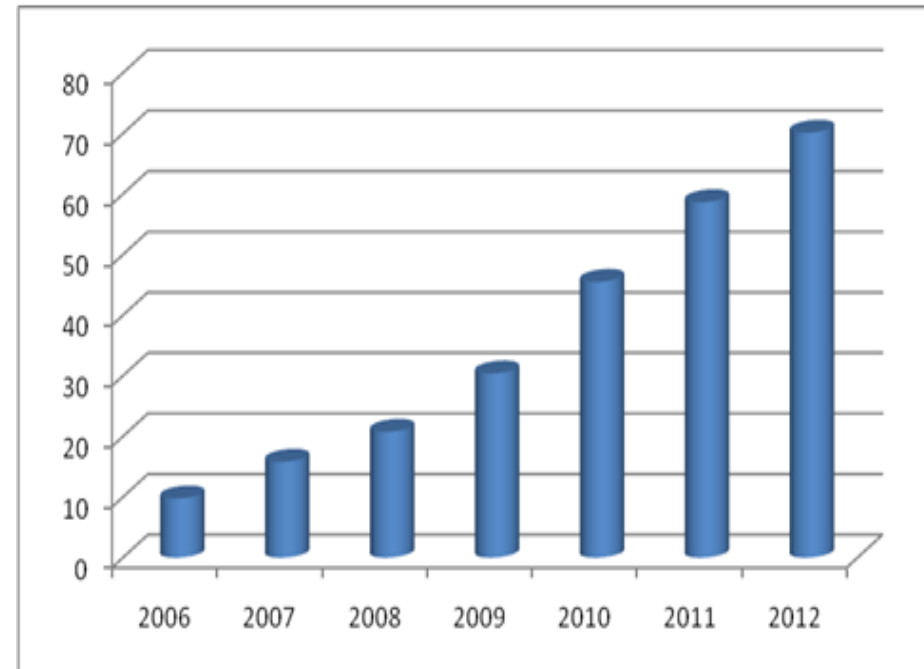
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

In 2009, the State Administration of Radio Film and Television (SARFT) released Opinions on TV Shopping Channel Construction and Management and Notice concerning Strengthening Management over TV Shopping Video Advertising and Home Shopping Programs in succession, which made China's TV shopping market more standardized, with market size up to RMB58.67 billion in 2011 and RMB70.12 billion in 2012.

For TV shopping companies, there are two influential types of business models: first, companies or professional shopping channels established by local TV stations themselves; second, companies operated by buying television time. Broadcast television system-managed TV shopping channels by virtue of their own low-cost channel advantage as well as the cooperation with broadcast television media are expanding their coverage and gaining more market share.

**China's TV Shopping Market Size, 2006-2012 (RMB billion)**



Source: ResearchInChina China TV Shopping Industry Report, 2013

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As of October 2013, no laws or regulations have been yet issued for TV shopping in China. Accordingly, there are no definite rules about the positioning, entrants' qualification, radio broadcast norms and other issues of TV shopping. Professional Committee of Media Shopping, China General Chamber of Commerce has already formulated Operational Requirements for Media Shopping, which with detailed provisions on show forum of TV shopping, duties and obligations of TV stations and market traders has been approved by the Ministry of Commerce People's Republic of China and will come into effect on November 1, 2013.

### **China TV Shopping Industry Report, 2013 highlights the followings:**

- ✘ A general overview of China's TV shopping industry, covering development course, policies and regulations, market size, industry chain, current development and future trends;
- ✘ Analysis on major developments of TV shopping industry in China, involving competition pattern i.e. home shopping and advertising model as well as development trend;
- ✘ Analysis on 13 companies like Oriental CJ, Happigo, Qegoo, Acorn International Inc. (ATV), Wuxing Shopping, including company profiles, financial data, the latest strategies, trends and so forth.

### **1 Definition and Mode of TV Shopping**

- 1.1 Definition
- 1.2 Foreign TV Shopping Mode
- 1.3 China's Current TV Shopping Modes

### **2 TV Shopping Industry Chain**

- 2.1 Product Supply
- 2.2 Payment
- 2.3 Logistics
- 2.4 TV Media

### **3 Development Environments of TV Shopping Industry**

- 3.1 Macroeconomic Environments
- 3.2 Policy Analysis
- 3.3 Risks and Solutions
- 3.4 Contributing Factors

### **4 Status Quo and Competition of TV Shopping**

- 4.1 Status Quo
- 4.2 Business Models
  - 4.2.1 TV Direct
  - 4.2.2 Home Shopping Channels
  - 4.2.3 Comparison of Two Models
- 4.3 Competition
- 4.4 Outlook

### **5 Foreign and Domestic TV Shopping Companies**

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  - 5.1.2 Operation Characteristics of QVC
- 5.2 Eastern Home Shopping
  - 5.2.1 Profile
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  - 5.3.1 Profile
  - 5.3.2 Main Access
  - 5.3.3 Main Products and Target Customers
  - 5.3.4 Latest Developments in 2012-2013
- 5.4 Oriental CJ
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  - 5.8.3 Financial Analysis
  - 5.8.4 Direct Sales Platform
- 5.9 China Seven Star Shopping Co., Ltd
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- 5.13 CNRMALL
  - 5.13.1 Profile
  - 5.13.2 Operation
  - 5.13.3 Latest Developments in 2012-2013

- TV Shopping Industry Chain
- Total Retail Sales of Social Consumer Goods, 2007-2013
- Consumer Price Index, 2003-2013
- Per Capita Disposable Income of Urban Residents, 2005-2013
- China's Social Retail Goods and TV Shopping Sales, 2004-2013
- Difference between TV Shopping and TV Direct-sale
- TV Direct vs. Home Shopping Channels
- Major National TV Shopping Channels
- Major Local TV Shopping Channels
- China's TV Shopping Industry Scale, 2011-2016E
- Main Operating Characteristics of QVC
- Major TV Shopping Channels of EHS
- Main Proprietary Brands of EHS
- Main Coverage Area of Happigo
- Product Distribution of Happigo
- Target Consumers of Happigo
- Features of Oriental CJ
- Major Covered Channels of Oriental CJ
- Channels Operated by CCTV Home Shopping
- Main Operating Characteristics of Best 1

- Major Covered Channels of Best 1
- Main Coverage Area of Best 1
- Revenue and Net Income of Acorn, 2008-2013
- Revenue Structure of Acorn International, 2008-2013
- Sales of Major Products of Acorn International, 2010-2012
- Revenue and Net Income of Seven Star, 2008-2012
- Operating Revenue of China Seven Star Shopping, 2012
- Major Secondary Companies of Jiayougo
- Major Distribution Areas and Time Limits of SSGO

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