



China TV Drama Industry Report,2013-2016

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.

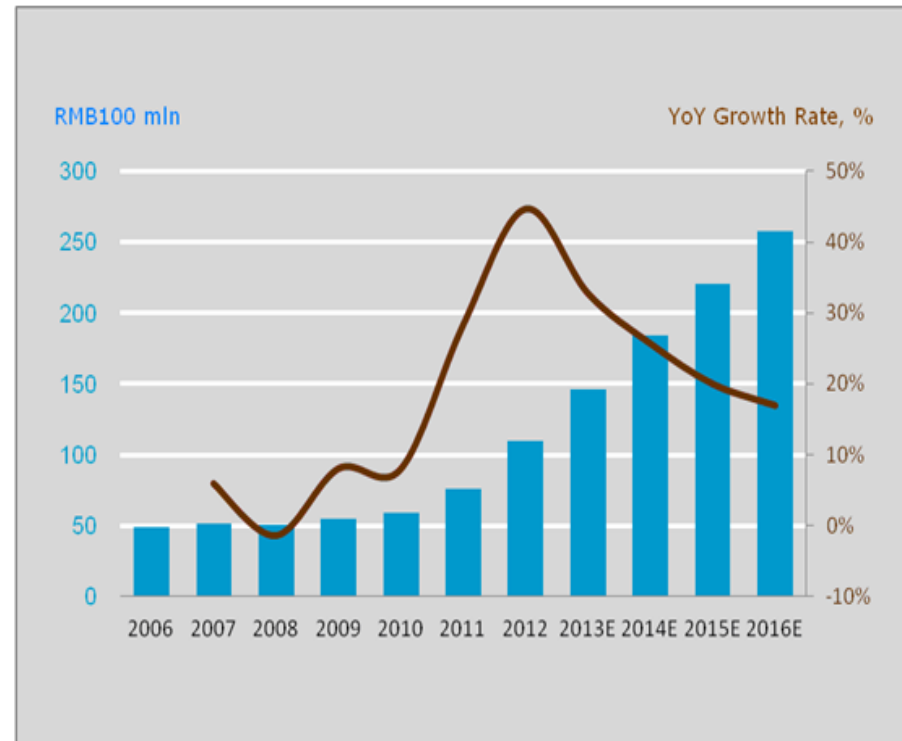
Abstract

In recent years, a series of favorable policies issued by the Chinese government in finance, intellectual property protection and culture industries stimulate the rapid expansion of Chinese TV drama market.

In 2012, 612 TV dramas were launched in China, rising by 50 ones year on year; 19,659 episodes were issued, representing a year-on-year increase of 2,941 ones. Meanwhile, 506 TV dramas made in China (accounting for 82.68%) were published, up 37 ones year on year; 17,703 episodes were released, with a year-on-year growth of 18.48%. The length of each TV drama made in China ascended from 27.58 episodes in 2006 to 34.99 episodes in 2012 averagely.

In 2012, the transaction value of TV dramas made in China jumped by 44.74% year on year to RMB11 billion, of which RMB8 billion sourced from broadcast copyright trading and RMB3 billion from network copyright trading. In 2011-2012, the transaction value increased significantly mainly because of the growing number of higher-priced classic dramas.

Transaction Value of TV Dramas Made in China, 2006-2016



Source: SARFT; ResearchInChina China TV Drama Industry Report, 2013-2016

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By H1 2013, there had been seven Chinese listed companies engaged in television production and distribution. In 2008-2012, their TV drama revenue grew at over 30%; by the CAGR of TV drama revenue, New Culture (88.67%), Enlight Media (81.63%) and Huace (61.26%) ranked the top three.

In 2012, five ones of these seven listed companies gained the gross margin of 40% or more. In point of gross margin, the top three companies were Huayi Brothers (56.02%), Huace (55.74%) and Hualu Baina (44.90%).

In the future, with the increase of Chinese TV drama platforms, the demand for high-quality dramas will go up, and the value of such dramas will rise. Prominent dramas will be the focal point that all platforms compete for.

The report consists of the following aspects:

- ✘ Overview of China TV drama Industry (including industrial chain, business models, profit models, relevant policies, television channels, TV advertising industry, online video industry, etc.)
- ✘ Chinese TV drama market (including status quo, supply and demand, revenue, export, prospect, etc.)
- ✘ Chinese TV drama production, distribution and broadcast markets (including status quo, competitive patterns, comparison between listed companies, TV stations, network broadcasting, etc.)
- ✘ The market of introduced TV dramas by China (including policies, status quo, competitive patterns, etc.)
- ✘ Operating performance, revenue structure, gross margin, TV drama business, competitive advantages, development strategies and prospect of major Chinese TV drama producers (including Huace, Huayi Brothers, HaiRun, etc.)

1 Overview of China TV Drama Industry

1.1 Definition and Industry Chain

1.1.1 Definition

1.1.2 Industry Chain

1.2 Business Model

1.2.1 Production Mode

1.2.2 Sales Mode

1.3 Profit Model

2 Development Environments of China TV Drama Industry

2.1 Related Policies

2.1.1 Policies and Regulations

2.1.2 Regulatory System

2.2 TV and Number of Subscribers

2.2.1 Ownership of TV Sets

2.2.2 Number of Subscribers

2.3 TV Channels and Ratings

2.3.1 TV Channels

2.3.2 TV Ratings

2.4 TV Advertising Industry

2.5 Radio and Television Industry

2.6 Online Video Industry

3 Chinese TV Drama Market

3.1 Status Quo

3.1.1 TV Drama Broadcasting and Ratings

3.1.2 Enterprises

3.2 Supply and Demand

3.2.1 Production

3.2.2 Circulation

3.2.3 Broadcast Amount

3.3 Industry Revenue

3.3.1 Transaction Volume

3.3.2 Single Episode Price

3.4 Export

3.5 Prospect

3.5.1 Highest TV Drama Broadcast Proportion and Ratings

3.5.2 High Advertising Profits of TV Dramas

3.5.3 Fierce Competition between TV Stations

3.5.4 Demand in New Media Market Increases

3.5.5 Fusion of Telecommunications Network, TV & Radio Network and the Internet Raises TV Drama Broadcast Platforms

3.5.6 Huge Development Space of Overseas Markets

4 Chinese TV Drama Production and Distribution Market

4.1 Status Quo

4.2 Competition Pattern

4.2.1 Overall Market

4.2.2 Regional Competition

4.2.3 Competition between Enterprises

4.3 Comparison between Listed Companies

4.4 Dramas Made by Video Websites

4.4.1 Status Quo

4.4.2 Competition Pattern

5 Chinese TV Drama Broadcast Market

5.1 Status Quo

5.2 TV Station Broadcast

5.3 Network Broadcast

5.4 Competition Pattern

6 Market of Introduced TV Dramas by China

6.1 Policies

6.2 Status Quo

6.3 Competition between Introduced TV Dramas and China-made TV Dramas

6.4 Market Pattern

7 Major Chinese TV Drama Producers

7.1 Huace

7.1.1 Profile

7.1.2 Operating Performance

7.1.3 Revenue Structure

7.1.4 Gross Margin

7.1.5 TV Drama Business

7.1.6 Competitive Advantage

7.1.7 Development Strategy

7.1.8 Prospect

7.2 Huayi Brothers	7.5.2 Operating Performance	7.8.3 Hunan TV & Broadcast Intermediary Co., Ltd.
7.2.1 Profile	7.5.3 Revenue Structure	7.8.3.1 Profile
7.2.2 Operating Performance	7.5.4 Gross Margin	7.8.3.2 Operating Performance
7.2.3 Revenue Structure	7.5.5 Top Five Suppliers and Clients	7.8.3.3 TV Drama Business
7.2.4 Gross Margin	7.5.6 TV Drama Business	
7.2.5 TV Drama Business	7.5.7 Competitive Advantage	
7.2.6 Competitive Advantage	7.5.8 Development Strategy	
7.2.7 Development Strategy	7.5.9 Prospect	
7.2.8 Prospect	7.6 Enlight Media	
7.3 HaiRun	7.6.1 Profile	
7.3.1 Profile	7.6.2 Operating Performance	
7.3.2 Operating Performance	7.6.3 Revenue Structure	
7.3.3 TV Drama Business	7.6.4 Gross Margin	
7.3.4 Competitive Advantage	7.6.5 Prospect	
7.3.5 Development Strategy	7.7 CCTV	
7.4 Hualu Baina	7.7.1 Profile	
7.4.1 Profile	7.7.2 China Television Media Co., Ltd. (CTV)	
7.4.2 Operating Performance	7.7.2.1 Profile	
7.4.3 Revenue Structure	7.7.2.2 Revenue	
7.4.4 Gross Margin	7.7.2.3 TV Drama Business	
7.4.5 TV Drama Business	7.7.3 Chinese International Television Corporation (CITVC)	
7.4.6 Sales Mode	7.7.4 China Teleplay Production Center Co., Ltd. (CTPC)	
7.4.7 Competitive Advantage	7.8 Hunan Broadcasting System	
7.4.8 Development Strategy	7.8.1 Profile	
7.4.9 Prospect	7.8.2 Subsidiaries	
7.5 New Culture		
7.5.1 Profile		

- Organizational Structure of Crew
- Organizational Structure of Crew
- Policies on China TV Drama Industry, 2000-2012
- Average Number of Color TV Sets Held by Every 100 Urban and Rural Residents in China, 2006-2012
- TV Comprehensive Population Coverage in China, 2006-2012
- Number of Cable TV Subscribers and YoY Growth Rate in China, 2006-2012
- Number of Cable Digital TV Subscribers and YoY Growth Rate in China, 2006-2012
- Digitization Rate of Cable TV in China, 2006-2012
- Number of TV Channels in China, 2006-2012
- Broadcast Time of Public TV Programs in China, 2006-2012
- Broadcasting and Rating Proportion of TV Programs in China, 2009-2012
- Average Length of Time of Chinese Audience on Watching TV, 2006-2012
- Market Size of Chinese Advertising Industry Segments , 2006-2013
- Chinese TV Advertising Market Size and Proportion in Advertising Industry, 2006-2013
- Revenue and YoY Growth Rate of China Radio and TV Industry, 2006-2016
- Number of Online Video Users and YoY Growth Rate in China, 2007-2013
- Market Size and YoY Growth Rate of China Online Video Industry, 2009-2016
- Broadcasting and Rating Proportion of TV Dramas in China, 2009-2012
- Number of Agencies Holding Radio and TV Program Production and Operation License and TV Drama Production License (Class A) in China, 2006-2012
- Number of Recorded and Publicized In-production TV Dramas Made in China and YoY Growth Rate, 2007-2012
- Circulation of TV Dramas and Episodes in China, 2007-2012
- Circulation of TV Dramas and Episodes Made in China, 2006-2013
- Circulation of TV Dramas and Episodes Made in China (by Theme), 2007 VS 2012
- Number of Aired TV Dramas and Episodes in China, 2006-2012

- Number of Aired TV Dramas and Episodes Made in China, 2006-2012
- Number of Newly Aired TV Dramas in China, 2009-2012
- Transaction Value and YoY Growth Rate of TV Dramas Made in China, 2006-2016
- Single Episode Price of Some Prominent Dramas in China, 2008-2013
- Single Episode Price of Some Prominent Dramas in China for Internet Copyright, 2006-2013
- China's TV Drama Export Volume and Value, 2008-2012
- China's TV Drama Export Volume and Value (by Country and Region), 2011
- Major TV Drama Production Agencies in China
- Market Share of Top 40 Production Agencies by Number of Recorded and Publicized TV Dramas Made in China, 2012
- Market Share of Top 25 Production Agencies by Circulation of TV Dramas Made in China, 2012
- Geographical Composition of Recorded and Publicized TV Dramas Made in China (by Number), 2012
- Market Share of Top 18 State-owned TV Drama Production Agencies by TV Drama Number and Circulation in China , 2012
- Market Share of Top 18 State-owned TV Drama Production Agencies by TV Drama Number and Circulation in China , 2012
- TV Drama Revenue Comparison between Listed TV Drama Companies, 2008-2012
- TV Drama Market Share Comparison between Listed TV Drama Companies by Revenue, 2008-2012
- TV Drama Gross Margin Comparison between Listed TV Drama Companies, 2008-2012
- TV Drama Circulation Comparison between Listed TV Drama Companies, 2008-2012
- TV Drama Market Share Comparison between Listed TV Drama Companies by Circulation, 2008-2012
- Self-produced Dramas of Some Well-Known Video Websites in China, 2005-2012
- Broadcast Modes and Number of TV Dramas Whose Ratings over 1% in China, 2011-2012
- Top 10 TV Dramas by Ratings and Their Production Agencies and Broadcast Platforms in China, H1 2013
- Top 10 TV Dramas Whose Webcast Volume Exceeds 1 Billion Times and Their Production Agencies and First Broadcast Platforms in China, 2009-2012
- TV Drama Ratings by Channel in China, 2010-2012
- Top 20 Chinese Satellite TV Channels by Evening Ratings, 2012

- Market Size and YoY Growth Rate of China Online Video Advertising Industry, 2006-2016
- TV Drama Distribution of Chinese Video Websites on Which Webcast Volume of TV Drama Exceeds 1 Billion Times, 2013
- Number of Introduced TV Dramas and Episodes by China, 2008-2012
- Proportion of Episodes of Authorized Released TV Dramas Made in China and Introduced TV Dramas by China, 2008-2012
- Proportion of Aired Episodes of Introduced TV Dramas and TV Dramas Made in China, 2008-2012
- Circulation of Introduced TV Dramas in Mainland China, 2008-2012
- Proportion of Launched Episodes of Introduced TV Dramas in Mainland China, 2008-2012
- Huace's Revenue and YoY Growth Rate, 2008-2013
- Huace's Net Income and YoY Growth Rate, 2008-2013
- Huace's Revenue Structure (by Product), 2008-2013
- Huace's Revenue Structure (by Region), 2008-2013
- Huace's Gross Margin (by Product), 2008-2013
- Huace's Gross Margin (by Region), 2008-2013
- Huace's Circulation of Self-produced TV Dramas and Market Share, 2006-2012
- Huace's Circulation of Introduced TV Dramas and Market Share, 2006-2012
- Huace's TV Drama Revenue, YoY Growth Rate and Market Share, 2008-2016
- Huace's Revenue and YoY Growth Rate, 2013-2016
- Revenue and YoY Growth Rate of Huayi Brothers, 2008-2013
- Net Income and YoY Growth Rate of Huayi Brothers, 2008-2013
- Revenue Structure of Huayi Brothers (by Product), 2008-2013
- Revenue Structure of Huayi Brothers (by Region), 2008-2013
- Gross Margin of Huayi Brothers (by Product), 2008-2013
- Gross Margin of Huayi Brothers (by Region), 2008-2013
- Circulation of Self-produced TV Dramas and Market Share of Huayi Brothers, 2006-2012
- TV Drama Revenue, YoY Growth Rate and Market Share of Huayi Brothers, 2008-2012

- Top 5 TV Dramas of Huayi Brothers by Revenue, 2012
- TV Drama Shooting and Distribution Plan of Huayi Brothers, H2 2013-2014E
- Revenue and YoY Growth Rate of Huayi Brothers, 2013-2016
- HaiRun's Revenue and YoY Growth Rate, 2008-2016
- HaiRun's Net Income and YoY Growth Rate, 2008-2012
- HaiRun's Gross Margin, 2008-2012
- Number of TV Dramas and Episodes Launched by HaiRun and Market Share, 2008-2012
- Revenue and YoY Growth Rate of Hualu Baina, 2008-2013
- Net Income and YoY Growth Rate of Hualu Baina, 2008-2013
- Revenue Structure of Hualu Baina (by Product) , 2008-2013
- Revenue Structure of Hualu Baina (by Region), 2008-2013
- Gross Margin of Hualu Baina (by Product), 2008-2013
- Gross Margin of Hualu Baina (by Region), 2008-2013
- Number of TV Dramas Launched by Hualu Baina and Market Share, 2008-2012
- TV Drama Revenue, YoY Growth Rate and Market Share of Hualu Baina, 2008-2016
- Revenue and YoY Growth Rate of Hualu Baina, 2013-2016
- Revenue and YoY Growth Rate of New Culture, 2009-2013
- Net Income and YoY Growth Rate of New Culture, 2009-2013
- Revenue Structure of New Culture (by Product), 2009-2013
- Revenue Structure of New Culture (by Region), 2009-2013
- Gross Margin of New Culture (by Product), 2009-2013
- Gross Margin of New Culture (by Region), 2009-2013
- Circulation of Self-produced TV Dramas and Market Share of New Culture, 2009-2012
- TV Drama Revenue, YoY Growth Rate and Market Share of New Culture, 2009-2016
- Market Demand Access Ways of New Culture

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- Revenue and YoY Growth Rate of New Culture, 2013-2016
 - Revenue and YoY Growth Rate of Enlight Media, 2008-2013
 - Net Income and YoY Growth Rate of Enlight Media, 2008-2013
 - Revenue Structure of Enlight Media (by Product), 2008-2013
 - Revenue Structure of Enlight Media (by Product), 2008-2013
 - Gross Margin of Enlight Media (by Product), 2008-2013
 - Gross Margin of Enlight Media (by Region), 2009-2013
 - Revenue and YoY Growth Rate of Enlight Media, 2013-2016
 - Subordinate Film and TV Drama Production Agencies of CCTV
 - CTV's Revenue and YoY Growth Rate, 2008-2013
 - CTV's Revenue by Business, 2008-2013
 - CTV's Gross Margin (by Product), 2008-2013
 - CTV's Film and TV Drama Revenue and YoY Growth Rate, 2008-2016
 - Film and TV Drama Production Subsidiaries of Hunan Broadcasting System
 - Revenue and YoY Growth Rate of Hunan TV & Broadcast Intermediary, 2008-2016
 - Revenue Structure of Hunan TV & Broadcast Intermediary (by Product), 2008-2013
 - Net Income and YoY Growth Rate of Hunan TV & Broadcast Intermediary, 2008-2013
 - Film and TV Drama Revenue and YoY Growth Rate of Hunan TV & Broadcast Intermediary, 2008-2016

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