

EXECUTIVE SUMMARY

TV in China is all but simple....

- More than **1.1 billion potential viewers** make over 20% of the viewers in the world.
- **Hundreds of channels** broadcasting at **different levels** (national, provincial, city...) and in **several languages**.
- A **market in constant development**, both on the technical side (cable, satellite, merging of channels) and on content side (wider choice of programmes, improved quality).

...but it is really an interesting topic.

CSM (CVSC/SOFRES Media), is the leader in TV audience measurement in China. Since 1996, it has been publishing a book with the main figures and trends of TV in China. The ambition is to provide an introduction to the **reality of TV in China through various vantage points**.

The 2002 edition includes the following topics:

- **A reminder of the history of TV in China, the current situation and possible future:**

China has changed dramatically since Chairman's Mao decision to create a TV industry in the 50's and since the "confidential" audiences of about 80 million in the late 70's.

By 2002, almost all Chinese can watch TV whether it is through terrestrial, cable or satellite. This evolution has led to important changes in the needs of viewers and in their viewing habits.

Cable and satellite channels have appeared and become more prevalent in today's TV market, leading to marked changes in TV viewing habits.

- **The main TV viewing trends (based on 62 cities) over 2001**, specifically:

An average consumption of 184 minutes a day per person in line with what has been observed in the past 5 years.

The continuing **importance of the Chinese New Year/Spring Festival and drama programs which attract considerable audiences**.

The **channels that viewers prefer** and the apparent factors behind their choice.

The **differences in viewing patterns** all around China, which are significant in such a huge country. Geography, urbanization are some of the key factors for the consumption of TV.

- **An in-depth view of the major TV markets in China:**

Beijing, Shanghai and Guangzhou have been measured using peplemeter technology for several years and the TV viewing data during 2001 will focus on the comparisons with the past years and the current trends.

Additionally, **5 more cities** have been installed with people-meters in 2001: they are **Shenzhen, Chengdu, Changsha, Hangzhou and Chongqing**. The book will present for the first time the major trends for these cities.

Finally, **an overview of viewing in provinces** (CSM measured 12 of them on a daily basis).

- **A variety of topics to provide the readers with more insights:**

The explanation of the reasons of the huge success of the popular drama “DaZhaiMen”: not only the actors and actresses were famous but also the topic, the quality of direction and the right choice of programming could explain such a TV success.

An insight on the results of China’s National Games held in Guangzhou in late 2001, which were highly watched and appreciated. One will see which kind of viewers watched the games and if it attracted audience all over China or only in the south.

A research oriented focus on how the channels can use the TV audience ratings for the optimisation of their programming and adapt it to the changes in the audience.

An introduction to China’s TV through the **first ever nationally representative people meter panel**.

Based on comparisons with 2000, the nation wide panel will show the China TV situation from a very different angle.....with impressive figures and surprising shares for the channels having the ability to broadcast nationwide.

Lastly, an introduction to the 2001 **TV advertising figures** showing that China’s TV adex is on the rise but that it is still a “local-oriented” market with the top 10 most advertised brands all being Chinese while foreign brands make up less than 10% of the total market.

- **Finally, for the 1st time this year, an introduction to foreign TV audience data**

As a **worldwide actor** in TV audience measurement, **Taylor-Nelson SOFRES**, (one of CSM’s parent company) is conducting TAM in many worldwide markets.

In this edition of the TV Book, we introduce more than 15 in order to give readers an idea of the situation outside China so that comparisons can be made.

Countries introduced range from Spain to Norway, Romania to Russia and outside Europe Israel, Vietnam, Korea and Japan.

We hope you will enjoy reading the 2002 CSM TV Book and that you will learn from it a lot of information.