

# 聚焦受众

## Audience Matters

TV 焦点

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# 调解类节目“收视之道”解析

冯波

电视调解类节目融合了电视节目类型的多种形式，内容以百姓日常生活中的矛盾纠纷为主，通过调解过程的展现，向受众传达生活中“真善美”的道德标准。按照节目内容是否具有百姓纠纷调解的性质，2011年上半年71城市共有38个频道播出了调解类节目，其中地面频道数量34个，占有播出调解类节目频道的89%。播出调解类节目的省级卫视频道有4个，占有播出调解类节目频道比例为11%。

首先，调解类节目整体收视渐行渐高。2011年上半年，调解类节目以其自身的优势，吸引了越来越多的观众关注。经历了2月初春节时期的小幅下跌以后，调解类节目的收视规模逐渐回升，截至2011年6月中旬收视规模较年初有明显增长，总收视渐行渐高，获得了更多观众的关注。

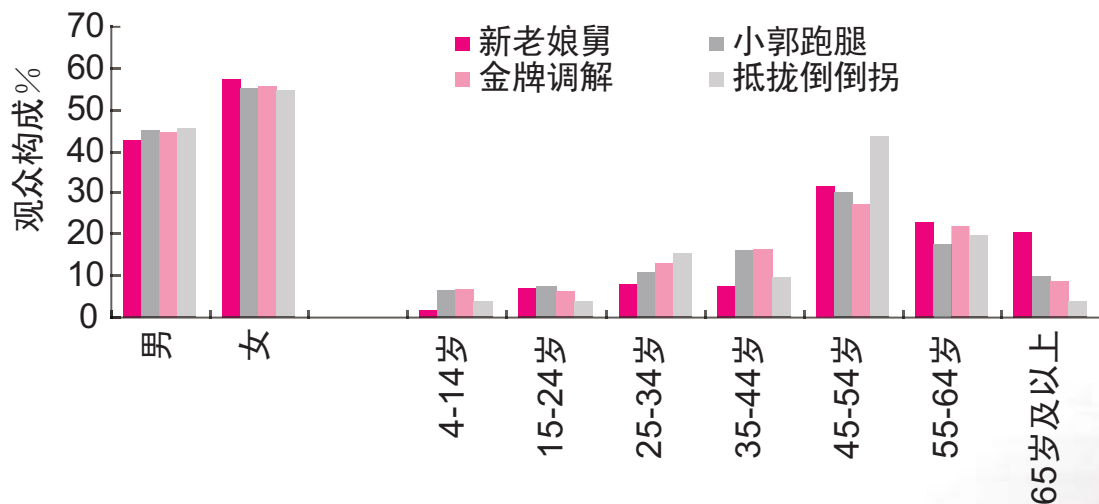
其次，调解类节目重播率高，重播收视竞争力较强。在本文考察的调解类节目中，几乎所有节目都有重播，而且多档节目重播收视效果也很好。上海娱乐频道

《新老娘舅》、江西卫视《金牌调解》、山西科教频道《小郭跑腿》等节目，除晚间黄金档在当地市场取得较好收视效果，节目的日间档及午间档也拥有较强的竞争力。

不仅如此，调解类节目收视高于本频道同类节目均值。调解类节目按其形式和内容侧重点不同，主要被归类为专题和生活服务类别。与同频道同类节目相比，在所考察的38档调解类节目中，有36档节目收视率高於其所在频道同类节目的平均收视率，从市场份额看，也基本高於同频道同类节目市场份额。

最后，多档调解类节目具有相似的观众结构。调解类节目以其贴近日常生活的内容获得了更多女性及中老年观众的青睐，从《新老娘舅》、《小郭跑腿》、《金牌调解》和《抵拢倒倒拐》四档节目看，女性观众所占比重都高於男性观众，45-54岁观众所占比重最高。

图1 部分调解类节目观众构成（2011.1.1-6.11）



# 单峰型城市收听表现分析

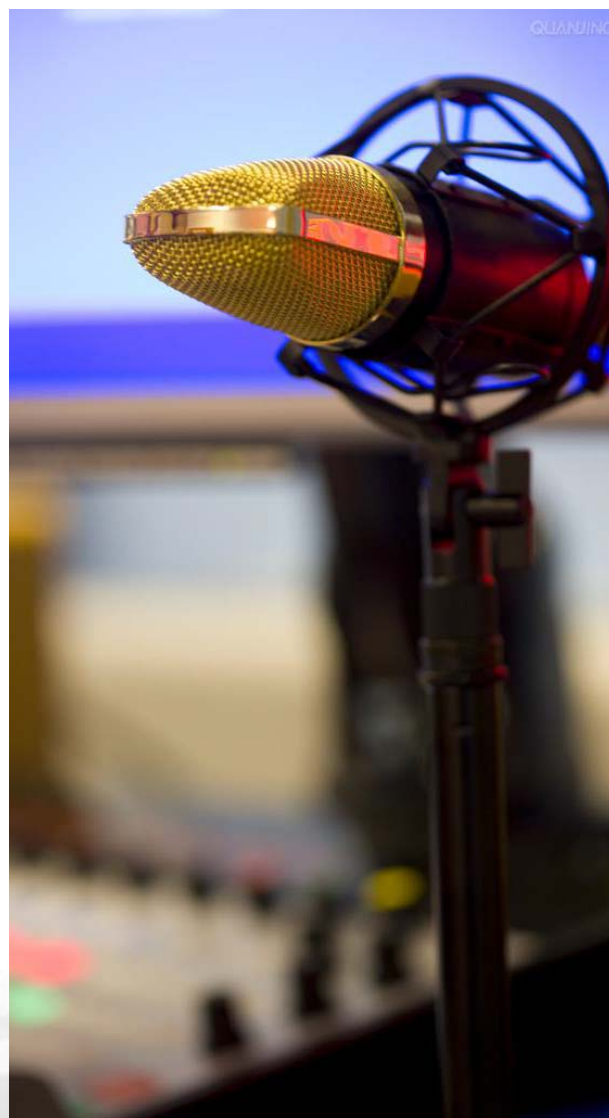
解永利

早晚出行高峰时段是受众一天中接触广播最重要的两个时段，这两个时段的时段贡献可以达到20%-40%，足见其对一个频率的影响力之深。重点分析单峰型城市的收听表现可以发现，受三网融合和新媒体发展的冲击，多数单峰型城市的收听呈逐年下降趋势，尤其是早高峰期间下降更为明显，与此相反，以晚高峰为主的哈尔滨则表现出截然不同的发展趋势，收听水平一路飘红，呈逐年上升态势，单峰型城市中的竞争力最明显的特征就是听众的忠实度较高。

无论是早高峰型城市还是晚高峰型城市，其主体受众群基本保持稳定，且他们偏好收听广播的场所与他们的身份和生活作息习惯也基本相符，反映出该地区广播市场发展较为平稳。整体而言，省市两级频率在当地市场的竞争优势明

显，显示了广播明显的属地性特征，在早高峰出行期间，中央级频率的竞争力也可可见一斑，贴近本地的当地频率受到听众的青睐，听众对关系到切身利益的节目，如天气预报、交通路况信息和新闻类节目的关注度较高。

早晚高峰时段是广播受众接触广播最多的两个时段，也是拉升一个频率整体收听水平的重要时段。近年来，虽然受三网融合和新媒体的冲击，早高峰时段收听水平呈现逐年下降的趋势，但我们要看到广播有他本身无可替代的优势，“解放了眼球”的特点决定了他是最适合开车一族的一种媒介形式，因此如何发挥这一优势，如何打造精品时段的精品节目，为听众提供更多更好的节目，吸引广大听众的注意力，以提升频率的整体水平，增强竞争力是下一步广播人要思考和解决的问题。



# 姚时代的结束

于松涛

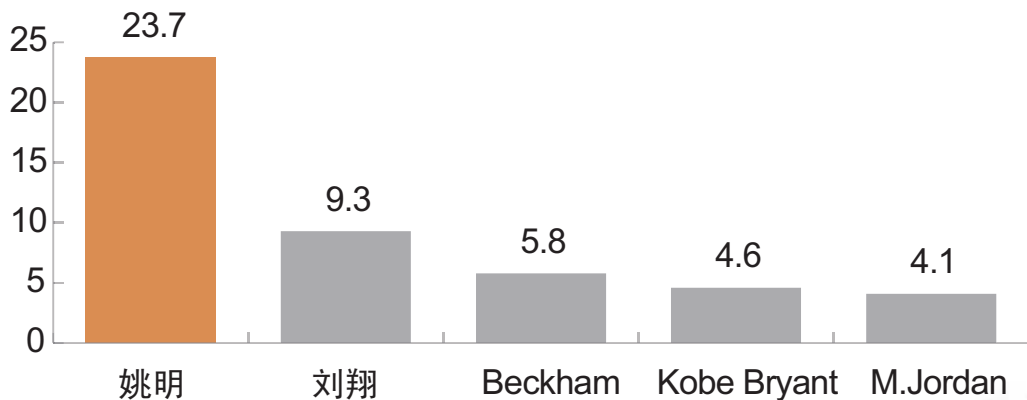
2011年7月20日，上海浦东嘉里酒店，姚明亲口宣布自己运动生涯的结束。中央电视台五套用了超过4小时的时间制作播出《风云会姚明传奇》，首次用如此大的篇幅来纪念运动员的退役。该节目在工作日的下午（13:00~17:55）播出，全国范围的收视率达到3.93了%，

是过去半年同周天同时段的2.4倍！试问，除了姚明，谁还会有这样的号召力？

姚明作为中国篮球史上一个里程碑式的人物，自2002年作为NBA选秀状元加入NBA，已经成为中国人乃至亚洲人的标志和骄傲。在CSM体育历年进行的有关

体育明星喜好程度的调研中，姚明一直是最受中国人欢迎的体育明星。在2011年春季最新的调查中，当问及最喜爱的体育明星时，有23%的受访者首先提到了姚明，远远领先于第二名的刘翔。美联社撰文称赞姚明在世界上的影响力空前绝后，并认为在NBA，再也没有什么事情能够达到姚明当年所吸引的观众人数了，除非出现“新”姚明。而在中国播出的NBA赛事中，姚明参与的火箭队比赛一直高于其它NBA赛事。在未来，没有姚明的NBA，没有姚明的中国国家队如何应对，让我们拭目以待。

2011年春季最喜爱的体育明星（第一提及）  
(中国十一大城市15-54岁受众)



# IPTV用户延续传统电视收视习惯，回路数据助广告商提升投放效果分析

黄婧玫

Kantar Media在2010年10月25日宣布，Google TV Ads将整合DIRECTView™的回路数据（RPD），用于对其广告投放进行优化。这个整合计划的目的是为营销人员和广告商提供新的销售和推广工具。回路数据服务以秒为单位，来测量观众的直播频道收看、节目时移服务使用等观看行为。回路数据可以对超过350个频道进行测量，提供观众的观看行为数据。用回路数据来丰富现有产品，可以为用户提供更加精确的分析，从而提升广告投放效果。

CSM与中国电信上海公司合作开展的

上海IPTV用户收视行为调查项目也是基于对回路数据的处理分析展开的。CSM希望通过对30万上海IPTV用户回路数据的分析，深入了解上海IPTV用户的收视行为，从而让客户能更好的掌握新媒体环境下受众的行为变化。

从2011年5月上海30万IPTV用户数据看，其中约93%的用户使用过点播服务，约85%的用户使用过回看服务。综合点播及回看业务可以看到，在周末这两种业务的到达率明显上升，形成5月份的使用高峰期（图1）。通过该数据也可以看出，传统电视的收视习惯在IPTV用户身上得

到延续。

在用户的分时使用情况上，点播及回看服务拓展了传统电视的收视高峰。19:00-23:00 期间为这两种服务的使用高峰期，较传统电视的黄金收视范围更广（图2）。

数据驱动的广告市场为电视节目制作创造了新的机遇。它让节目制作者可以直接和市场接触，并在广告商的购买力的刺激下对节目制作进行更深层的洞察。回路数据的使用可以为市场分析研究增加更多可能性，从而为广告商提供更优质的服务。

图1 点播及回看业务使用的到达率分天变化

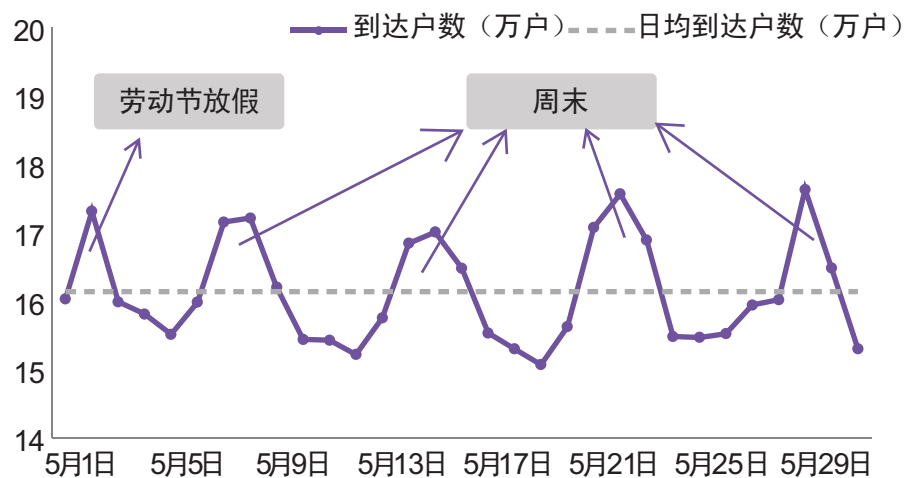
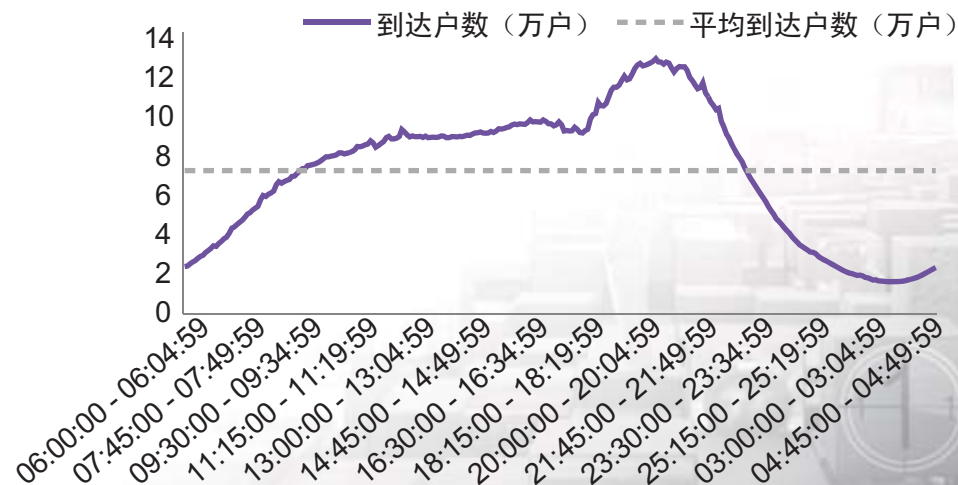


图2 点播及回看业务用户规模的月度分时变化



数据来源：CSM媒介研究

# 2011年6月四城市月度节目收视排行

## (2:00-26:00, 4岁以上所有观众)

城市	排名	节目名称	播出频道	平均收视率%
北京	1	天气预报	北京卫视	12.75
	2	直播周末 黄金赛场:2011年法国网球公开赛女子单打决赛	中央台五套	9.26
	3	转播中央台新闻联播	北京卫视	7.78
	4	雪花那个飘 (31-38集)	北京卫视	6.46
	5	BTV赛场: 2011年中国足球协会超级联赛第13轮 (北京国安VS天津康师傅)	北京电视台体育频道	6.22
上海	1	中国达人秀	上海东方卫视	22.34
	2	达人来了	上海东方卫视	13.98
	3	新闻透视	上海电视台新闻综合频道	10.49
	4	观众中来	上海电视台新闻综合频道	10.03
	5	新闻报道	上海电视台新闻综合频道	9.12
广州	1	怒火街头 (3-20集)	翡翠台(中文)	9.79
	2	真相 (1-4集)	翡翠台(中文)	9.51
	3	花花世界花家姐 (13-20集)	翡翠台(中文)	8.08
	4	水浒传 (81-86集)	广东电视台珠江频道	7.95
	5	今日关注	广东电视台珠江频道	7.70
香港	1	华丽明星赛 争华斗丽星中星	无线电视翡翠台(模拟+标清+高清)	30.40
	2	怒火街头 (3-20集)	无线电视翡翠台(模拟+标清+高清)	29.70
	3	真相 (1-4集)	无线电视翡翠台(模拟+标清+高清)	28.00
	4	花花世界花家姐 (13-20集)	无线电视翡翠台(模拟+标清+高清)	27.10
	5	团圆 (1-14集)	无线电视翡翠台(模拟+标清+高清)	25.70

- 注: 1. 内地各城市电视节目排名的时间范围是全天时段, 各电视节目以该节目的平均收视率排名, 首、重播分开。  
 2. 内地重大体育赛事、娱乐赛事和气象服务类节目, 收视率选取最高一档参与排序。  
 3. 香港无线电视翡翠台(模拟+标清+高清)的合计数据会使用于当节目在无线电视翡翠台(模拟)、无线电视翡翠台(标清)及无线电视翡翠台(高清)同步播出时。  
 4. 香港地区为各节目的平均收视率排名, 节目排名不包括节目时长少于五分钟之节目。

# 公司简介

CSM是CTR市场研究与Kantar Media集团共同建立的合资公司，致力于专业的电视收视和广播收听市场研究，为中国大陆地区和香港传媒行业提供可靠的、不间断的视听调查服务。作为电视节目、广播节目和广告交易“通用货币”的提供者，CSM拥有世界上最大的广播电视受众调查网络，覆盖5.7万余户样本家庭及超过18.8万样本人口；其电视收视率调查网络所提供的数据可推及中国内地超过12.5亿和香港地区637万的电视人口；其广播收听率调查的数据则可推及中国超过8000万的广播人口。截至2011年7月，CSM已建立起186个提供独立数据的收视率调查网络（1个全国网，25个省级网，以及包括香港特别行政区在内的160个城市网），对1,256个电视频道的收视情况进行全天不间断调查；同时，CSM也已在中国33个重点城市及2个省开展收听率调查业务，对416个广播频率进行收听率调查。



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# 聚焦受众

## Audience Matters

TV Focus

Radio Live

Sports Drive

New Vision

Key Facts

About CSM

# Conflict Resolution Program's Viewing Analysis

Feng Bo

Conflict Resolution programs integrate various forms of television programs, and their contents are mainly based on the conflicts and disputes in people's daily life. By revealing the conflict resolution process, this type of program shows the ethical standards of "truth, goodness and beauty" to audiences. Classified by whether the program has a dispute resolution feature, conflict resolution programs were broadcast by 38 channels in 71 cities in the first half of 2011; among these channels, 34 are terrestrial channels, which broadcasted 89% of all conflict resolution programs and 4 others are provincial satellite channels, that broadcasted 11% of conflict resolution programs.

First, the ratings of conflict resolution programs continue to rise. In the first half of 2011, depending on their unique advantages, conflict resolution programs attracted more and more audience attention. After a slight decline during the Spring Festival in early February, the viewing of conflict

resolution programs rose gradually. As of mid-June 2011, the viewing of conflict resolution programs had significantly increased comparing to that in the beginning of the year.

Second, conflict resolution programs had high replay rate and the rating performance was also strong for repeats. Almost all the conflict resolution program we studied in the article were repeated after the original broadcast and many of them had good viewing results during for the repeats. "The New Old-Uncle" from Shanghai Entertainment Channel, "Golden Conflict resolution" from Jiangxi Satellite TV, "Errands Guo" from Shanxi Science and Education Channel and some other conflict resolution programs not only got good ratings in prime time, but also showed strong competitiveness in their repeat time bands during the day time.

Moreover, conflict resolution programs' ratings were higher than the average rating of programs

in the same genre broadcasted by the same channels. Depending on the form and content, conflict resolution programs could be classified as special topic programs or life service programs. Compared to the average rating of other special topic and life service programs, among the 38 conflict resolution program we analyzed, 36 programs had higher ratings and higher market shares.

Finally, most conflict resolution programs have similar audience structure. Since conflict resolution programs focus more on content close to daily life, they got more attention from females as well as middle aged and elderly audiences. The audience structures of "The New Old-Uncle", "Errands Guo", "Golden Conflict resolution" and "Making a Turn at the Dead End" show that the proportion of female viewers is higher than that of males and that 45-54 years old audiences make up the largest proportion of the audience.

# Single Listening Peak Cities Listening Analysis

Xie Yongli

In most markets morning and evening commute periods are the two most important periods for radio listening, and these two periods can contribute up to 20% -40% of a stations listening time, a large influence on radio frequencies performance. An analysis focusing on radio listening in cities with single listening peak (single-peak city) shows that, the impact of network convergence and new media developments may be leading to a listening decline year by year, especially in cities having morning peak. Cities with evening peaks have different development trends and their radio listening has increased year on year. Among all single listening peak cities a significant trait is their high audience loyalty.

No matter in morning-peak cities or evening-peak cities, the main listening

audience remained stable and their radio listening place preferences remain in line with their demographic characteristics. This indicates stable development trends in regional radio market. In general provincial and city level frequencies had clear competitive advantages in the local markets, showing significant regionalization features of radio media. In the morning peak commute period the competitiveness of national frequencies is evident. Local frequency audience appeal is based their programming focus on local life characteristics; programs, which are highly related to audience's interests, such as weather forecasts, traffic information and news programs, got more attentions from audiences.

Morning and evening peak hours are the two periods when audiences have the most

contact with radio media, and the periods that are important to pull up the general listening condition of a radio frequency. In recent years, in spite of radio listening levels in the morning peak markets showing a declining trend caused by the impact of network convergence and new media, we still see the irreplaceable advantages of radio media. The "liberation of the eyeball" feature decides that radio is the most suitable media form of car drivers. Thus, how to take the most advantage of this unique quality, how to create high quality programs for core time bands, how to provide more and better programs for audiences, how to attract more attention from audiences and how to increase the general competitiveness of frequencies, are questions that radio operators need to think about and solve in the future.

TV Focus

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About CSM

# The Times of Yao Has Gone

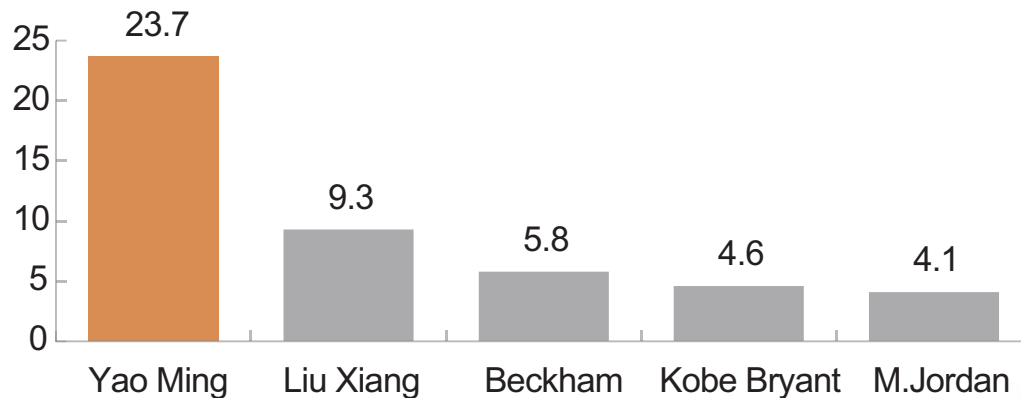
Yu Songtao

July 20, 2011, the Shanghai Pudong Jiali hotel, Yao Ming announced to end his career as a basketball player and officially retire. CCTV5 manufactured an over 4 hours special program to report the affairs and review Yao's past, which is the first time for CCTV5 to spend such length and such energy to commemo-

rate an athlete's retirement. The program (13:00~17:55) was broadcasted in a Wednesday working day afternoon, but the TV ratings across the whole country achieved 3.93%, which is 2.4 times compare to the same timeslot, same weekday in the past half year. Who can win such rallying point besides Yao Ming?

Yao Ming is a milestone in Chinese basketball history, and he is the Chinese and even Asian's symbol, who joined NBA as the champion in the NBA's draft in 2002, Yao Ming is always the most favorite sports star by Chinese people, which the data from CSM sports all studies regarding sports stars. The newest data from the surveys of 2011 spring shows: 23% respondents first mentioned Yao Ming as the most welcomed sports stars, far ahead of the second – Liuxiang. Yao's NBA games always attracted more TV viewers than other NBA games in China. What will NBA or Chinese national basketball team deal without Yao? Let's see.

Most favorite sports stars (First mentioned)  
(15-54 yrs from China's 11 biggest cities)



# IPTV Users Maintain the Viewing Habit of Traditional TV, RPD Helps Advertisers to Enhance the Ads Placement

Huang Jingmei

On October 25th 2010, Kantar Media announced that Google TV Ads will integrate Return Path Data (RPD) from Kantar Media's DIRECTView™ service to enhance optimization of its ad placements. The goal of the program is to provide marketers and advertisers with new sales and marketing tools. The service enables measurement of the entire spectrum of live and time-shifted (DVR) audience viewing behaviors at a second-by-second level across more than 350 channels. Providing RPD as an ingredient to existing client products may enhance analytics for more effective targeting.

A research program about Shanghai IPTV user viewing behavior conducted by CSM

and China Telecom Shanghai Branch is based on the analysis of Return Path Data. CSM is focusing on insights into Shanghai IPTV users' viewing behavior through the analysis of 300,000 users' data. From this research, the industry will develop a clearer idea about viewing habit in the new media environment.

The Return Path Data from Shanghai's 300,000 users in May shows that about 93% of users used VOD (Video On Demand) services, and about 85% users used TVOD (TV On Demand) service. In general, the reach of VOD and TVOD increased strongly during weekends, which constituted the usage peak of May. (Chart 1) The daily reach data also shows that

traditional TV's viewing habits are maintained in this new media environment.

From time-band level, VOD and TVOD services expand the traditional viewing peak. 19:00-23:00 is the usage peak for VOD and TVOD services, (Chart 2) and it is wider than the traditional viewing peak.

Data-driven advertising marketplaces are creating new opportunities for television programmers to connect with marketers, spurred by the ability of ad buyers to gain insight into the programming inventory under consideration. The use of RPD in general, greatly enhances the analysis made possible through these marketplaces, which may improve the service to a higher level.

Figure 1 Daily reach of VOD and TVOD (May 2011, Shanghai 300,000 IPTV users)

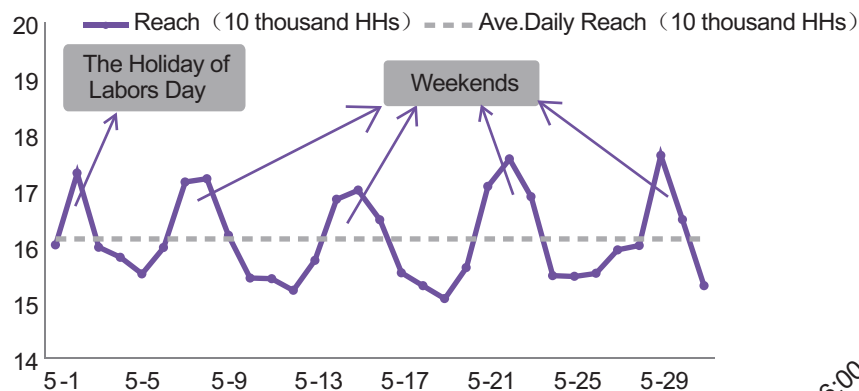
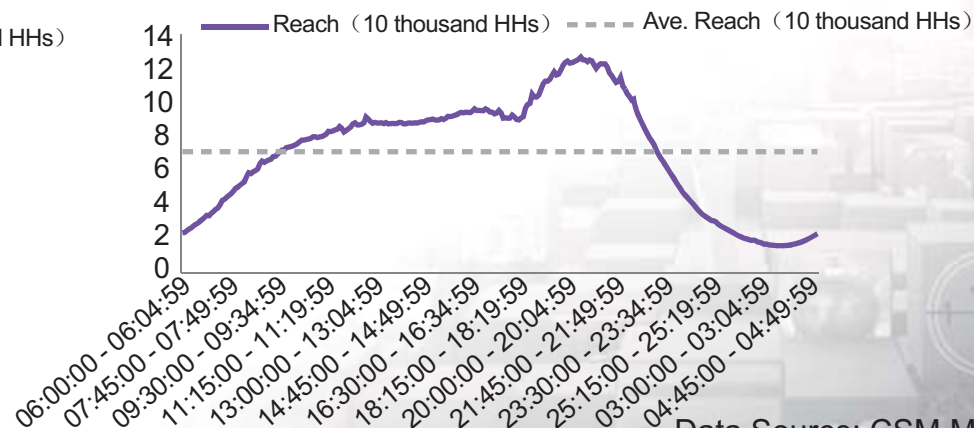


Figure 2 Time-band reach curve chart of VOD and TVOD (May 2011, Shanghai 300,000 IPTV users)



Data Source: CSM Media Research

# Monthly TV Program Ranking in Four Key Markets, Jun. 2011 (02:00-26:00, 4+)

City	Ranking	Program	Channel	AvRtg%
Beijing	1	Wheather Forecast	BTV Satellite Channel	12.75
	2	Live Weekend Gold Stadium: 2011 French Open Tennis Champions Women's Singles Final	CCTV-5 Channel	9.26
	3	CCTV News Broadcast	BTV Satellite Channel	7.78
	4	Snow in the Wind	BTV Satellite Channel	6.46
	5	BTV Stadium:2011 Chinese Super League (CSL) Week 13 (Beijing Guoan F.C vs Tianjin Teda F.C)	BTV Sports Channel	6.22
Shanghai	1	China's Got Talent	Shanghai Dragon TV	22.34
	2	The Talent is Coming	Shanghai Dragon TV	13.98
	3	News Perspecitve	SHTV News Comprehensive Channel	10.49
	4	From Audiences	SHTV News Comprehensive Channel	10.03
	5	News Report	SHTV News Comprehensive Channel	9.12
Guangzhou	1	Ghetto Justice (Episodes 3-20)	TVB Jade (Chinese)	8.64
	2	The Other Truth (Episodes 1-4)	TVB Jade (Chinese)	8.41
	3	My Sister Of Eternal Flower (Episodes 13-20)	TVB Jade (Chinese)	8.23
	4	The Water Margin (Episodes 81-86)	GDTV Pearl River Channel	8.10
	5	Focus Today	GDTV Pearl River Channel	8.03
Hong Kong	1	All Star Glam Exam	TVB Jade (Analogue+SD+HD)	30.40
	2	Ghetto Justice (Episodes 3-20)	TVB Jade (Analogue+SD+HD)	29.70
	3	The Other Truth (Episodes 1-4)	TVB Jade (Analogue+SD+HD)	28.00
	4	My Sister Of Eternal Flower (Episodes 13-20)	TVB Jade (Analogue+SD+HD)	27.10
	5	Wax And Wane (Episodes 1-14)	TVB Jade (Analogue+SD+HD)	25.70

- Notes: 1. Mainland: This is a daily avrtg% ranking of TV program in all time bands; premirre broadcast and rebroadcast are counted as different programs.  
 2. Mainland: Only includes the highest avrtg% big sports event, big entertainment events or wheather forecast program in the ranking.  
 3.TVB Jade (Analogue+SD+HD) is used when the program is stimutaneously broadcasted on TVB Jade(Analogue), TVB Jade(SD ) and TVB Jade (HD).  
 4.Hongkong: This is a daily avrtg% ranking of TV program in all time bands; programs, which are less than 5 minutes, are not included.

# About CSM

CSM Media Research is a joint venture between CTR Market Research and the Kantar Media. Dedicated to TV & radio audience measurement research, CSM Media Research offers reliable and uninterrupted rating information for Hong Kong SAR and China. CSM Media Research operates the world's largest TV & radio audience measurement panel network, covering more than 57,000 households and 188,000 individuals. CSM's TV audience measurement network provides data that represents the viewing of 1.2 billion people in China mainland and 6.3 million people in Hong Kong SAR. The radio network represents the listening of 80 million people in China. Up to July, 2011, CSM delivers data from 186 TAM panels (1 national panel, 25 provincial panels, and 160 city panels including Hong Kong SAR) which provide data independently, measuring the viewing of 1,256 unique TV channels all day, every day of the year. Meanwhile, CSM has built radio audience measurement panels in 33 cities and 2 province, measures the listening of 416 radio frequencies.



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