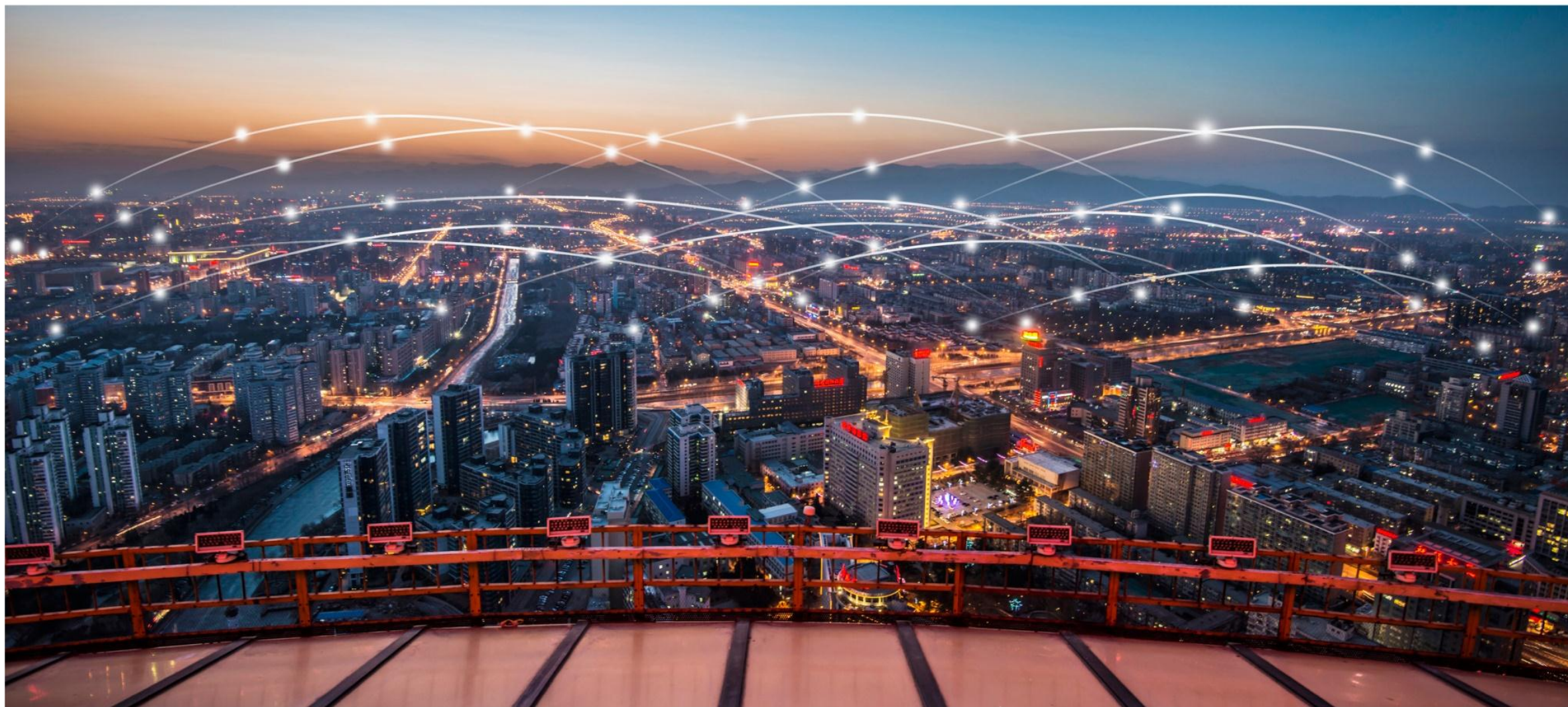


# 中国媒体概览 China Media Overview



# All Media



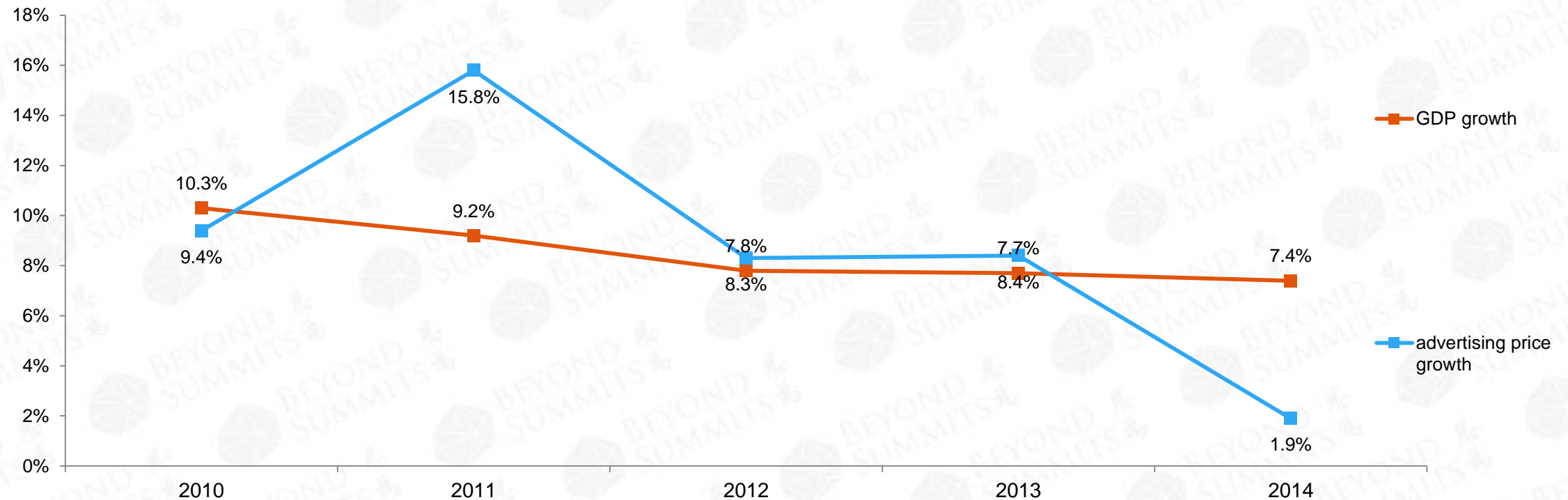
## Summary :

- Influenced by China's overall economic, domestic media advertising industry experienced inflection point in 2014 and started to go downward. The increase rate of publish price was lower than that of GDP. In recent years, the total expense of media's domestic advertisement has kept rising with a yearly 10% growth rate.
- Mass media now is experiencing an aging trend. TV media has highest contact rate. However TV's quota of using is reduced and its quota of advertisement keeps shrinking. Contrarily, digital Internet media market is steadily rising, in which mobile digital media segment market has ascended significantly. Print media market start to shrink. Broadcast media now is experiencing alternating iteration in terms of using habits.
- Regarding to the brands and advertisers, the proportion of digital marketing and terminal promotion costs has kept rising in corporate marketing, while the budgets of hard-sell ads are cut tremendously. TV still has the most advertising budgets, and the digital media take the second place in advertising budgets. It can be expected that in the future, brands will be promoted in a cross-media way with various media channels combined as an integral portfolio.

**Before 2014:** The growth of media advertising marketing is higher than GDP growth

**After 2014:** Inflection point shows, the ads quotation starts to decrease

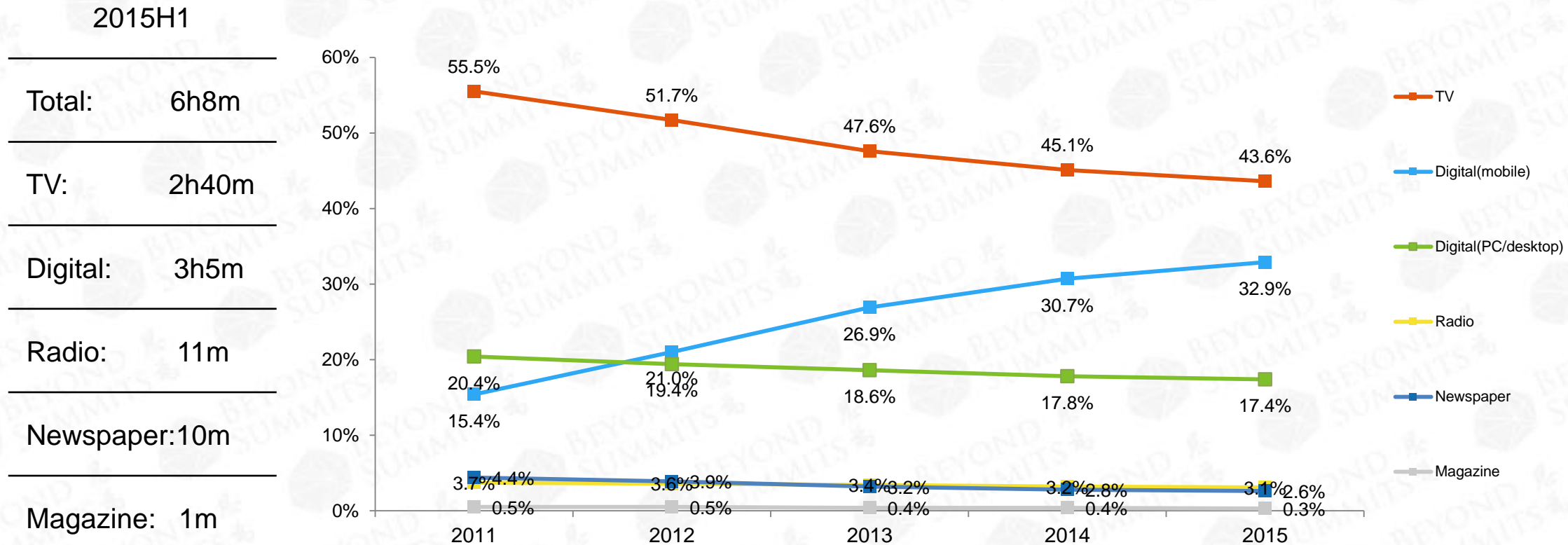
**Historical GDP growth VS advertising price growth**



Source : 2014 CTR +iResearch data, nationwide, all industries

The daily time spent on TV is getting less while the total time on digital media is longer than on traditional media, among which PC's share is shrinking while mobile's is significantly rising. Time on print and radio shows no big change.

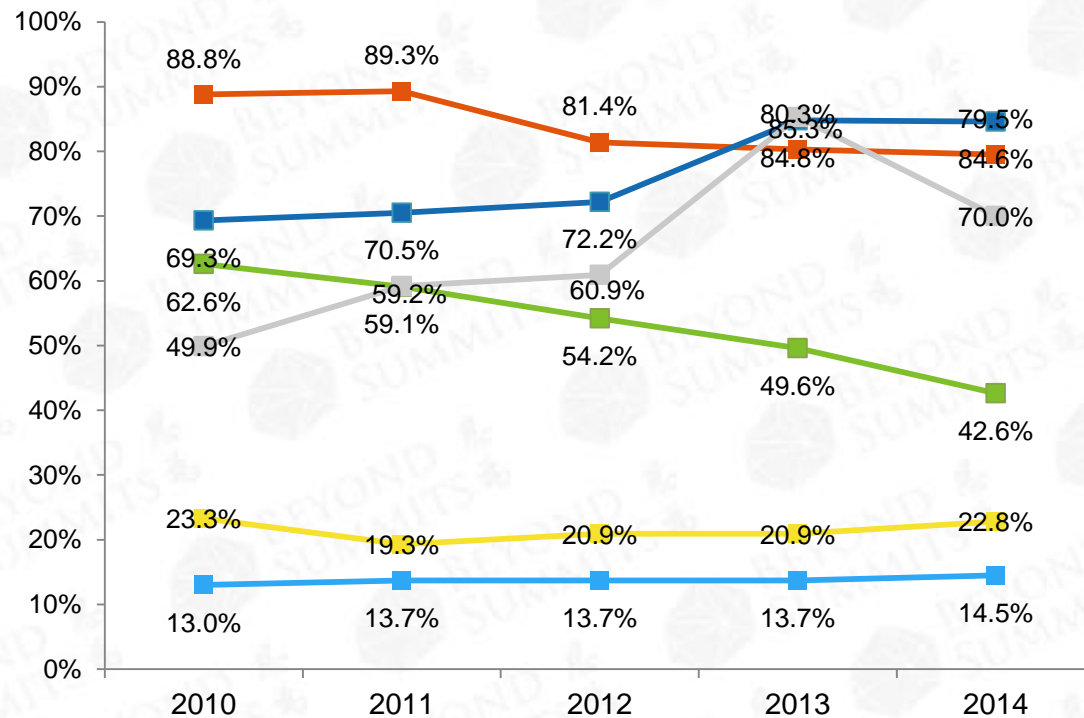
Chinese adult user's daily usage share on different media



Source : eMarketer, June 2015

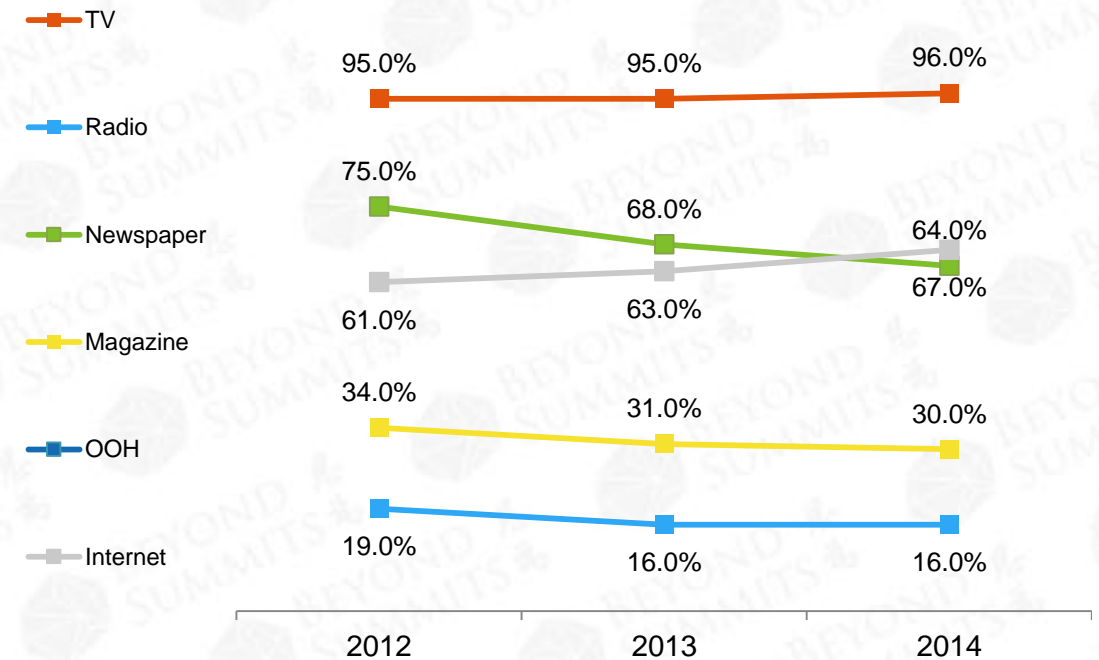
Magazine's and radio's reach rate stays low these years while newspaper's reach is lowering year by year. Internet's and OOH's reach keep rising and will be on pace to approach or surpass TV media.

**Comparison on media reach  
in 5 years (GroupM)**



Source : GroupM, 2014 China Media Scene

**Comparison on media reach in 3 years (Zenith Optimedia)**

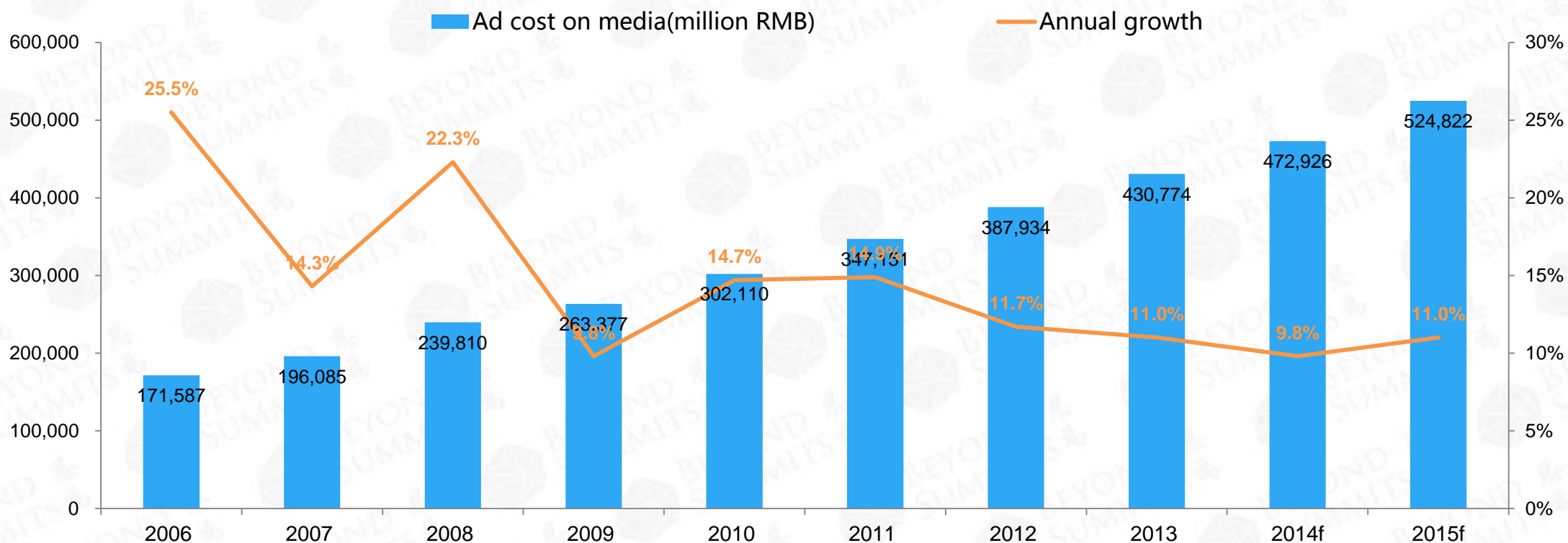


Source : Zenith Optimedia 2014 China Media Scene



In recent years, domestic ad cost spent on media has been getting higher and higher with annual growth around 10%.

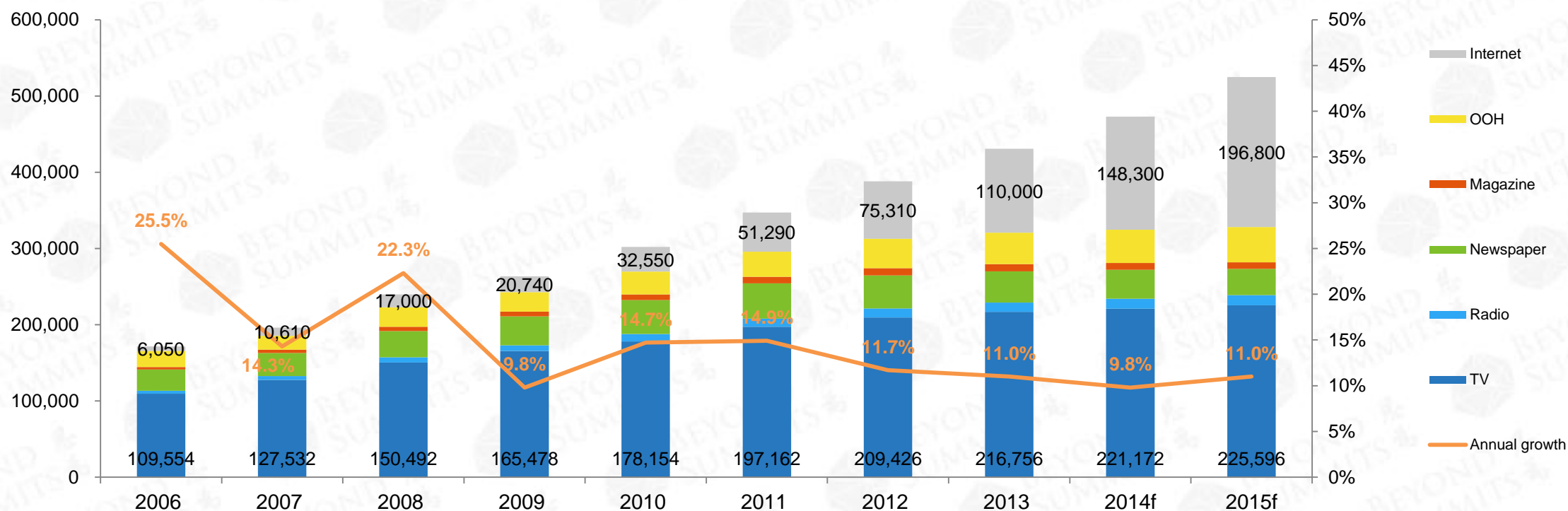
Historical trend and annual growth of ad cost spent on media



Source : Data is estimated in 2014&15  
GroupM, 2014 China media industry prediction

The ad scale on Internet is significantly expanding, cost on Internet ads keeps at a over 30% growth rate these years.

**Annual growth of ad net cost spent on different media  
and historical trend on total media**

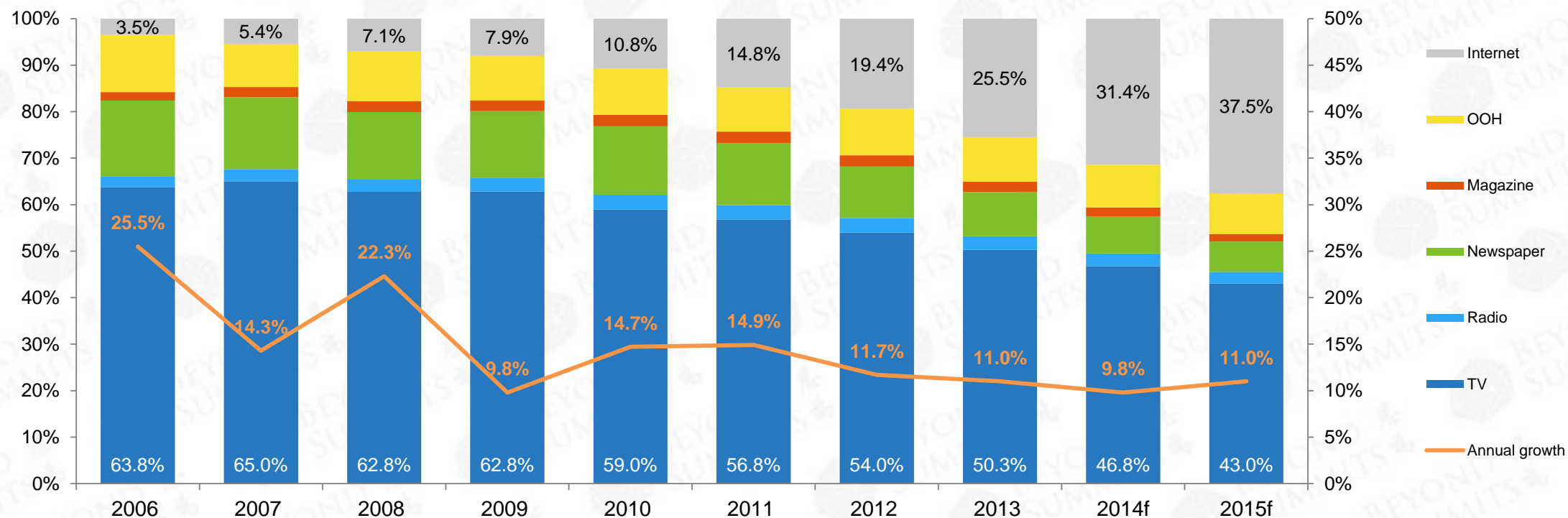


Source : Data is estimated in 2014&15  
GroupM, 2014 China media industry prediction



In terms of market share, TV's ad share is shrinking while Internet ad share keeps rising.

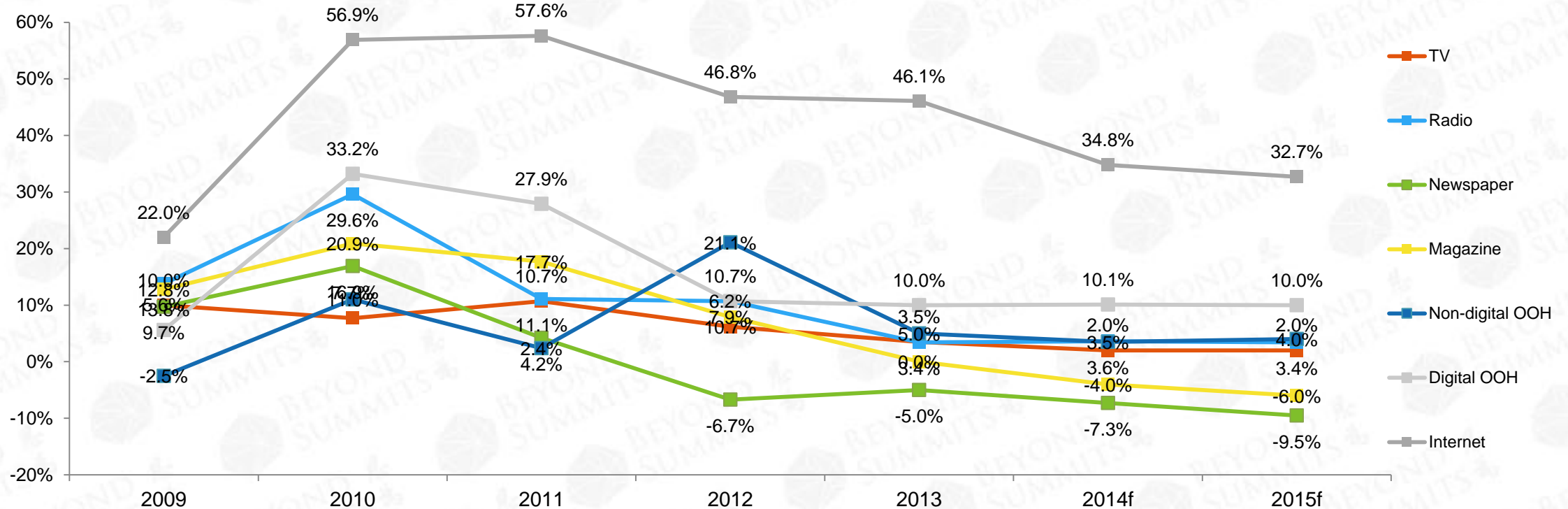
**Annual growth of ad cost's share on different media  
and historical trend on total media**



Source : Data is estimated in 2014&15  
GroupM, 2014 China media industry prediction

Seen from annual growth, print remains negative these years while Internet keeps at a 30% steady growth.

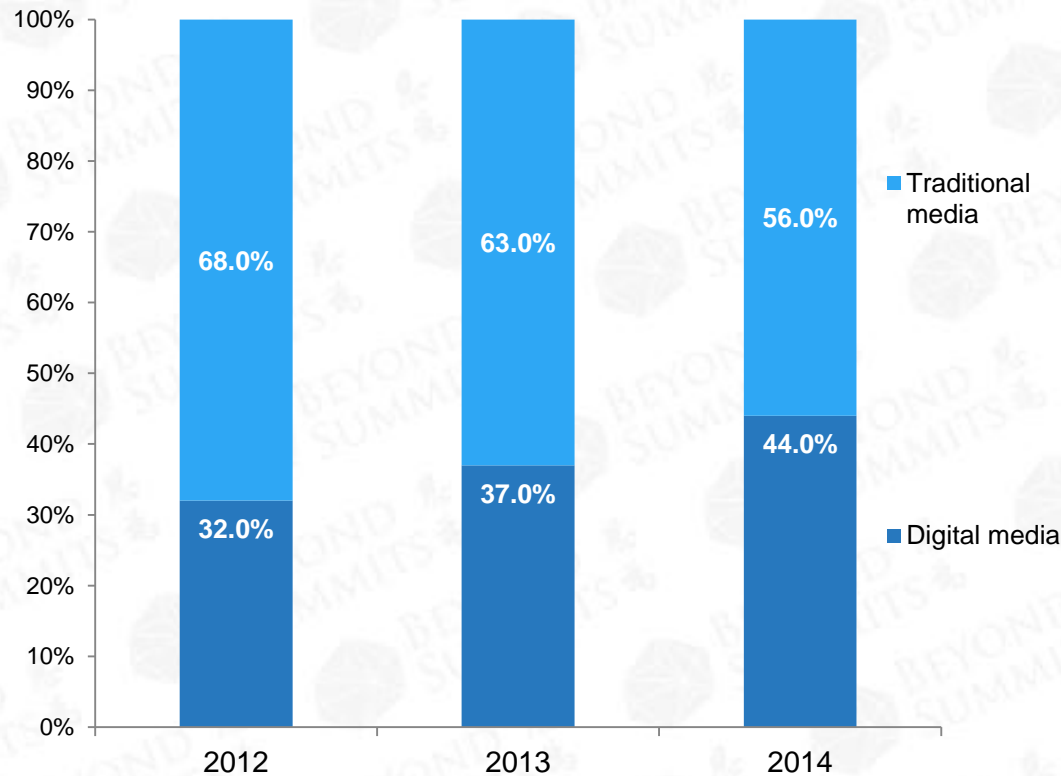
Historical annual ad cost growth spent on different media



Source : Data is estimated in 2014&15  
GroupM, 2014 China media industry prediction

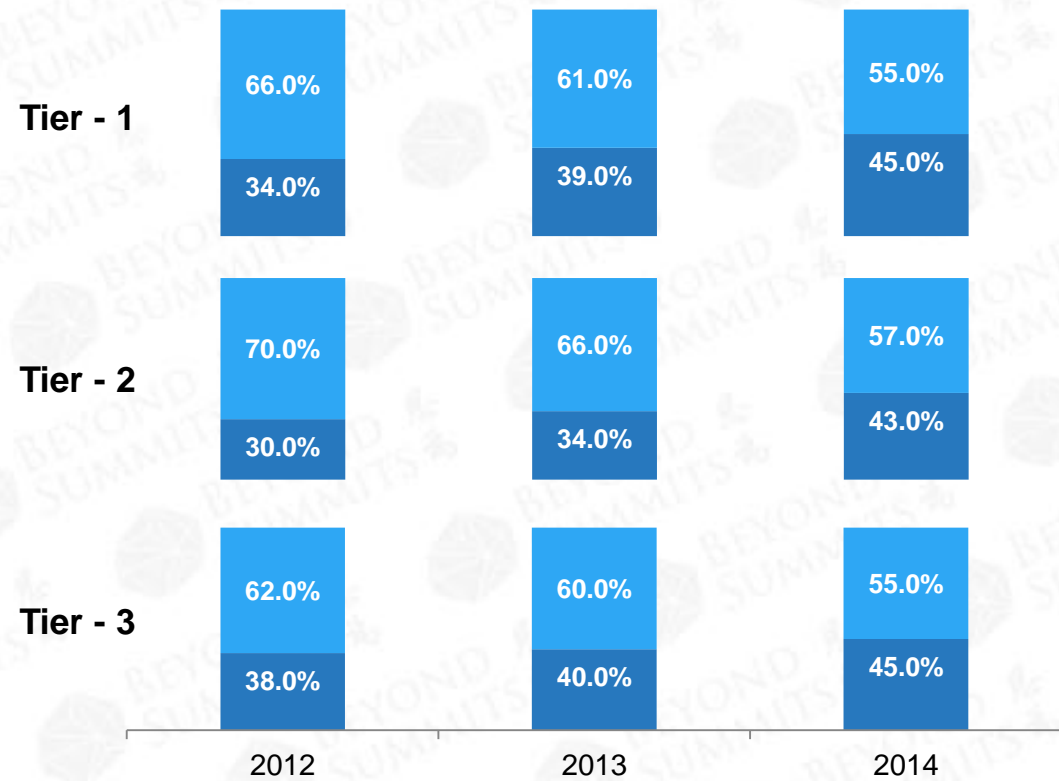
Time spent on traditional media is decreasing and very close to the time on digitals. No obvious difference among different city tiers, remaining at 55% of mass media and 45% of digital media.

Share of time spent on different media



Source : Zenith Optimedia 2014 China Media Scene

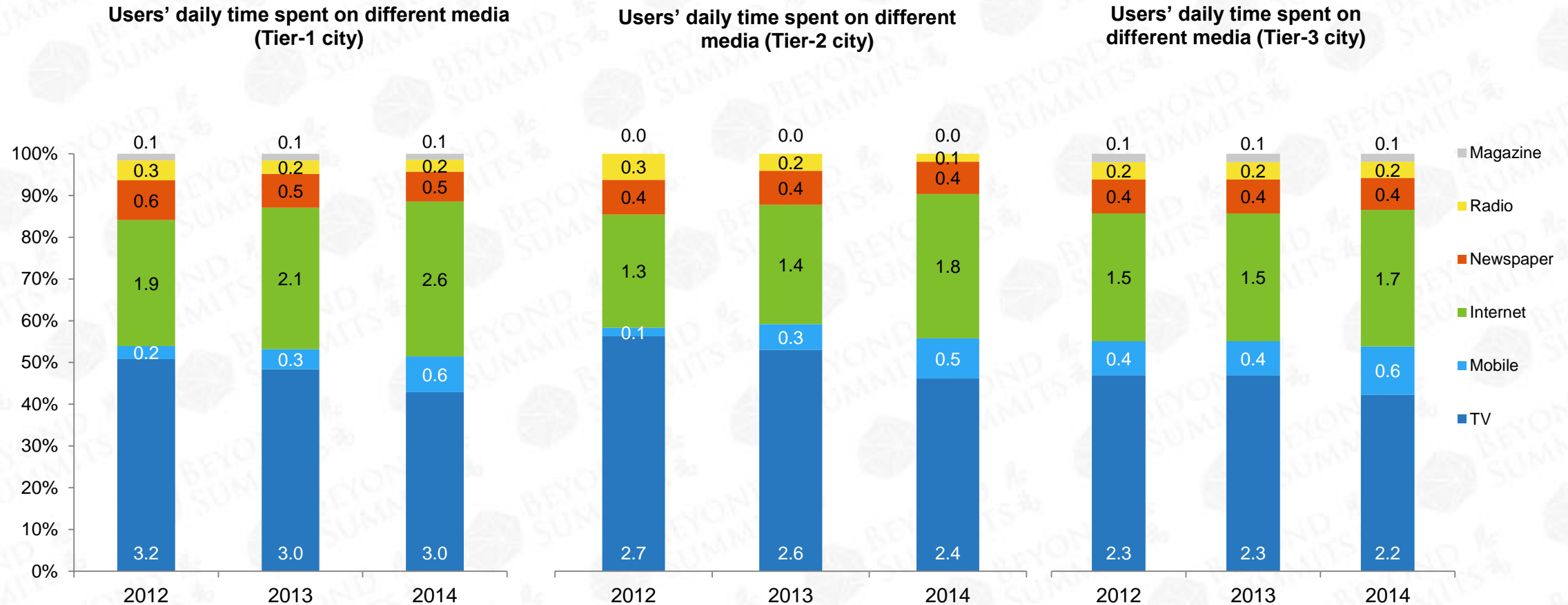
Share of time spent on media among different city tier



Source : Zenith Optimedia 2014 China Media Scene



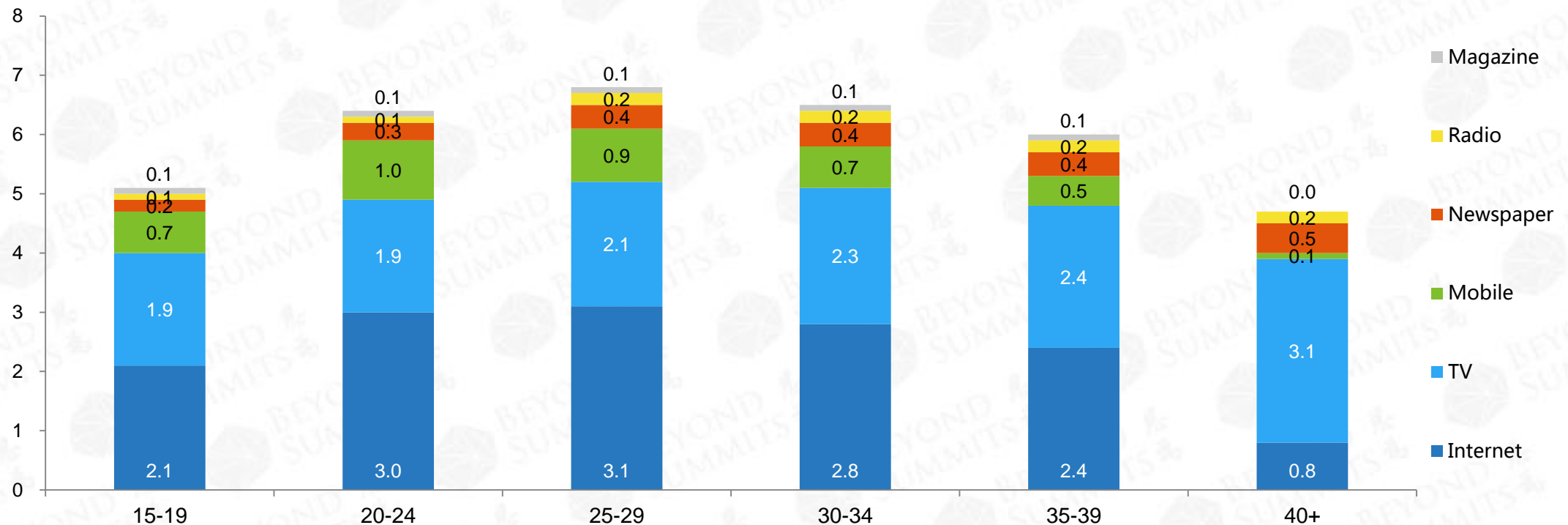
Seen from time on each media, media users usually spend longest time on TV, then Internet seconds, meantime users are more and more possessed with mobile.



Source : Zenith Optimedia 2014 China Media Scene

Internet severe lovers are usually users aged from 20 to 34. The elder a person is, the more deeply he is attached to traditional media such as TV and newspaper.

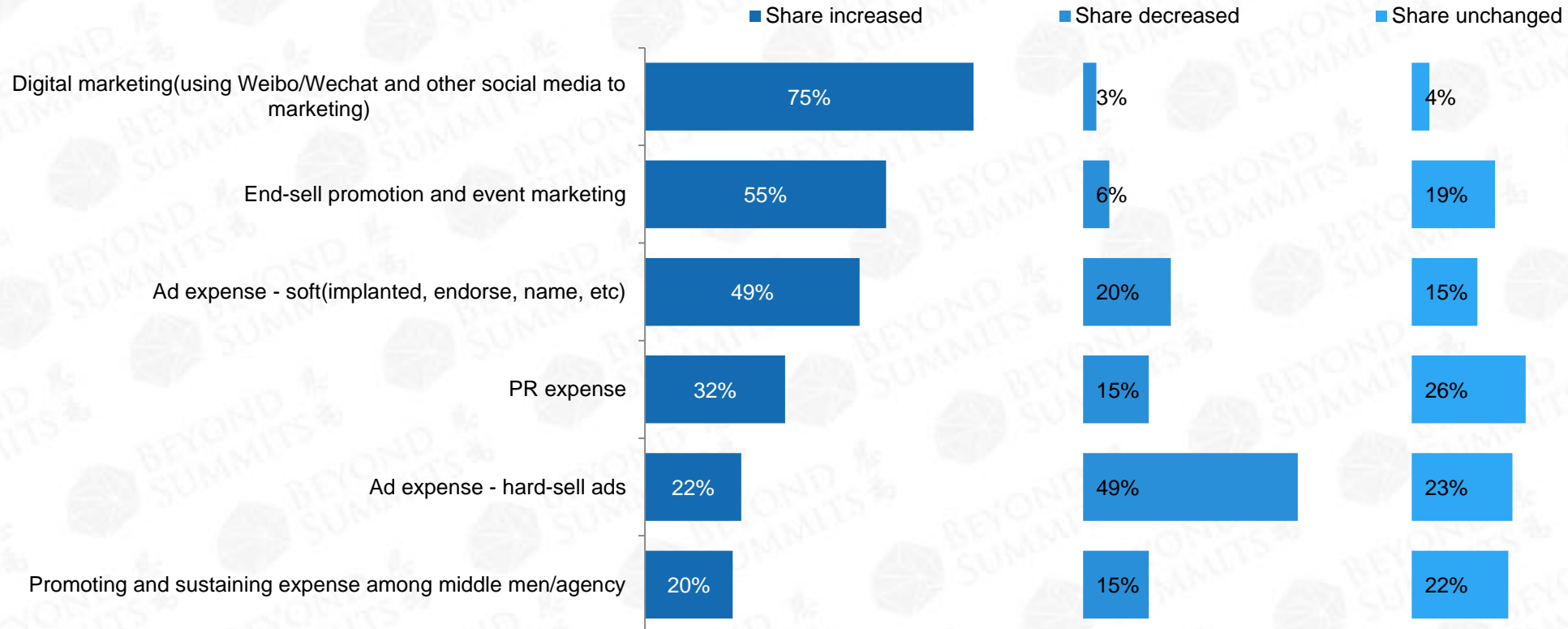
**Different aged users' time spent on different media in 2014**



Source : Zenith Optimedia 2014 China Media Scene

When talking about future changes in 2015's marketing budget allocation, digital marketing and end-sale promotion's share will increase a lot while hard-sell ads' budget sees the biggest fall.

### Future changes in 2015's marketing budget allocation

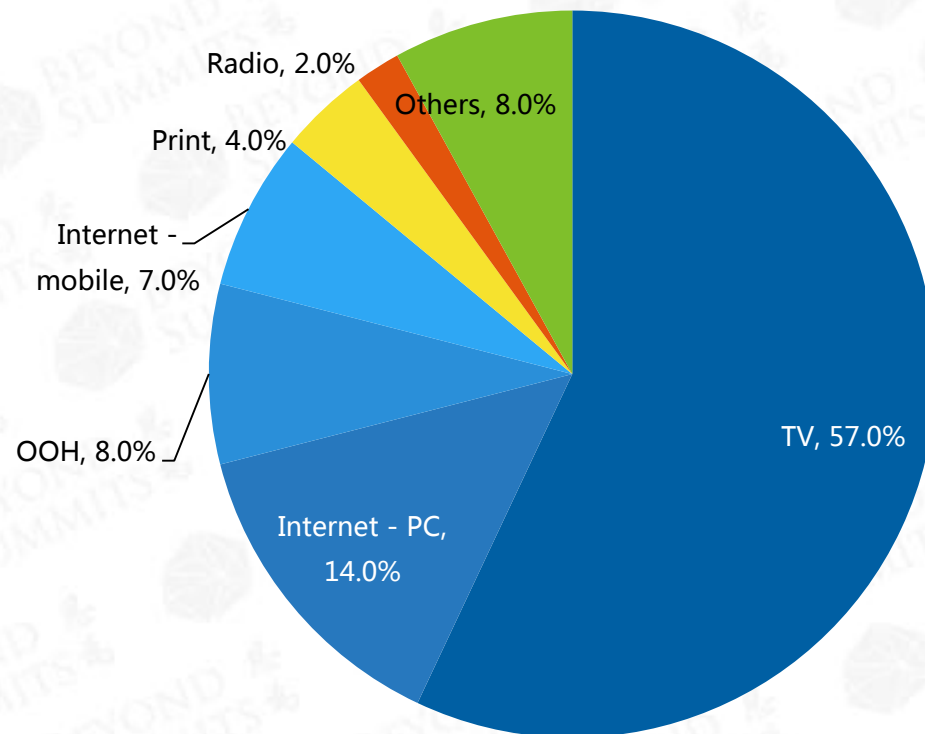


Source : CTR 2015 Advertiser & Ads report

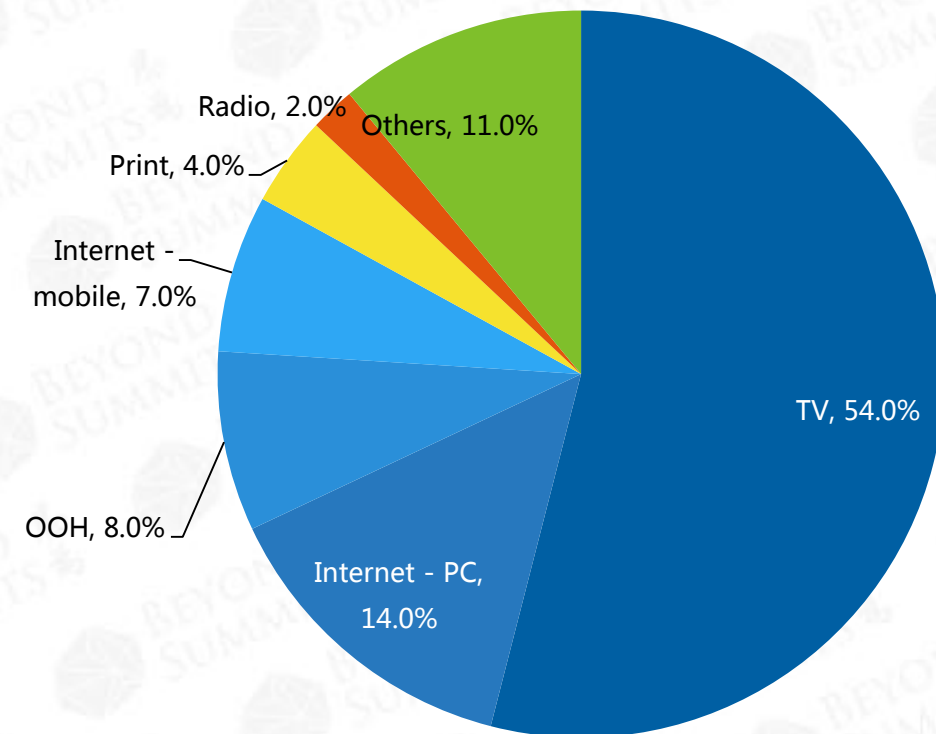


In 2014 and 2015, TV is the media that owns the largest marketing expense among all.

A company's expense share on different media in 2014



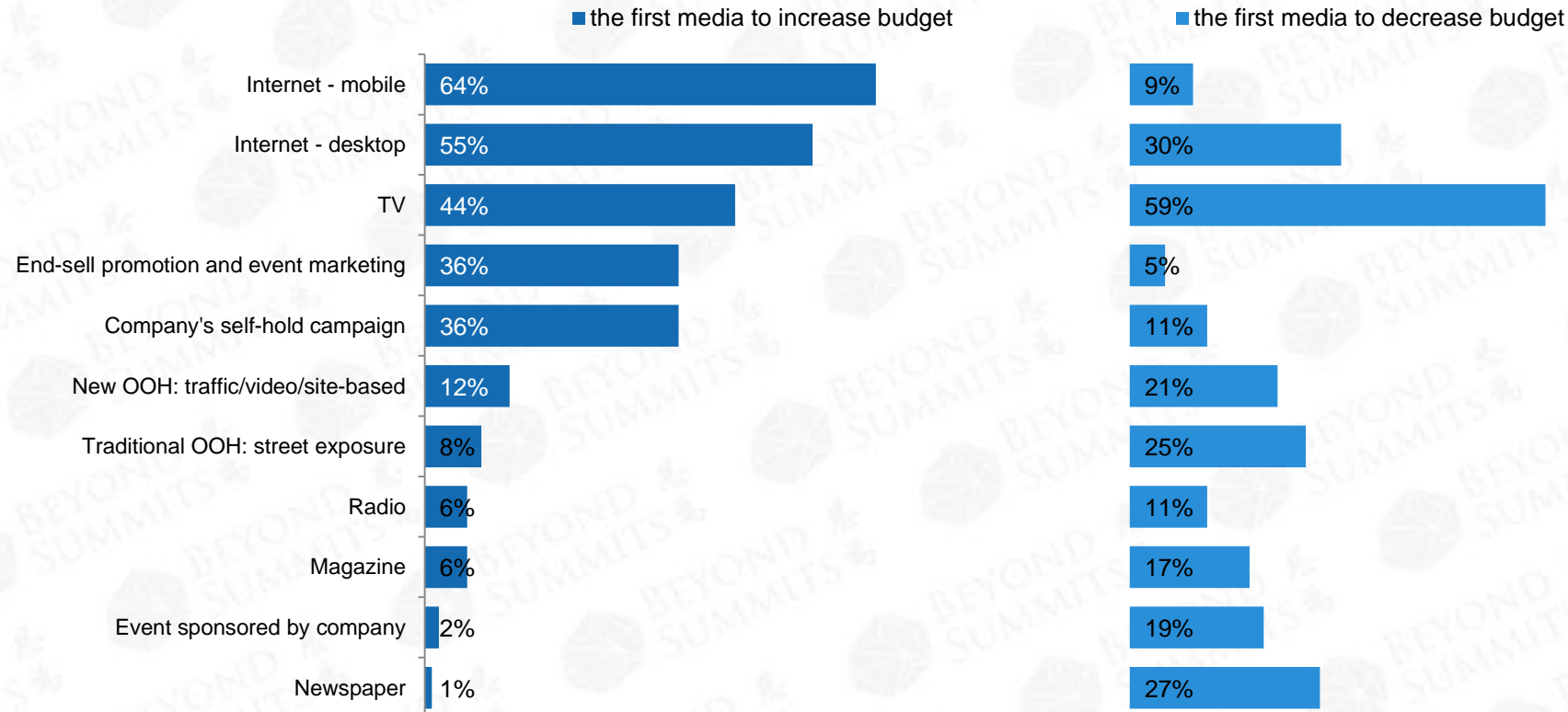
A company's predicted expense share on different media in 2014



Source : CTR 2015 Advertiser & Ads report

In 2015, Internet ranks the most prioritized media when considering increasing marketing budget while TV is the first media when considering decreasing budget.

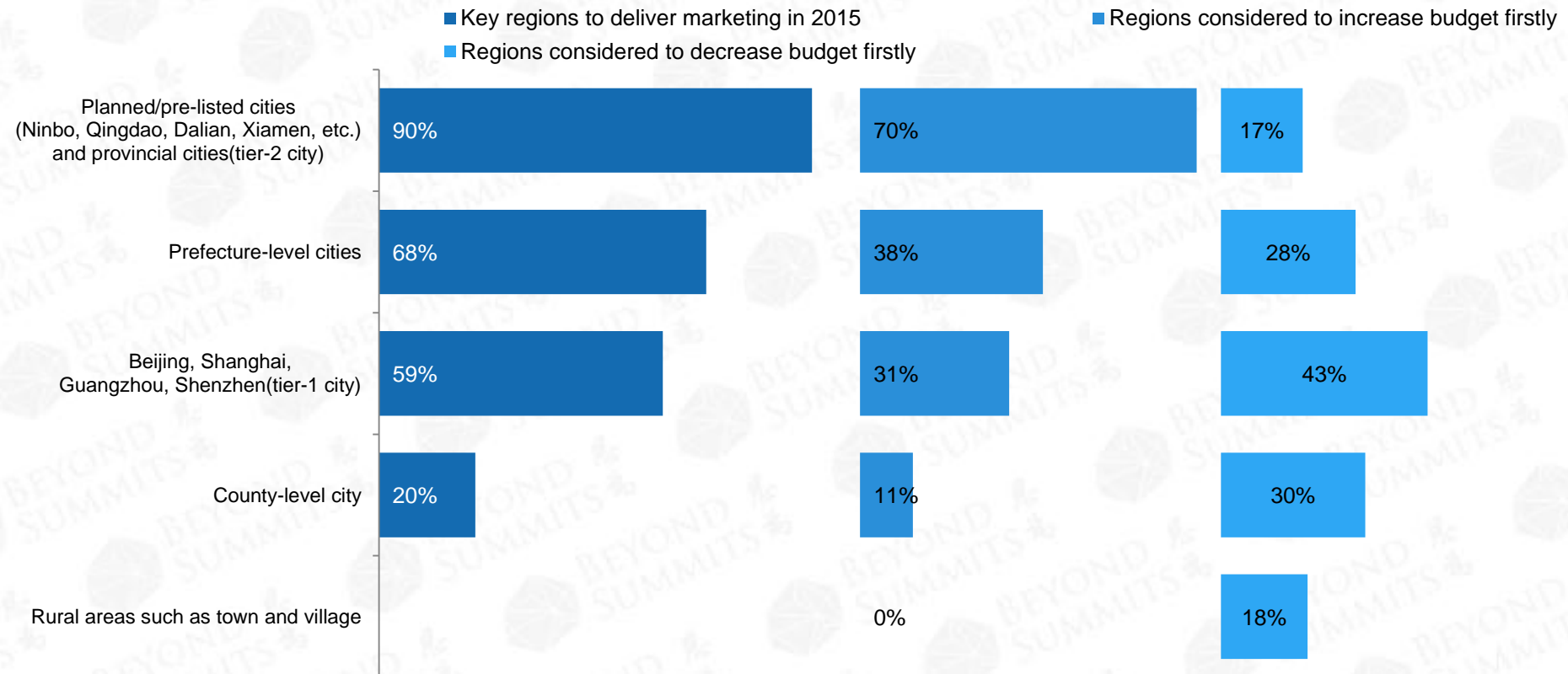
### The prioritized media to increase/decrease marketing budget in 2015



Source : CTR 2015 Advertiser & Ads report

Tier-2 and tier-3 cities will be the key regions to deliver marketing in 2015, which are the prioritized cities when considering budget increase. Tier-1 cities are thought to be the first to cut down budget.

### Regions to increase/decrease marketing budget in 2015



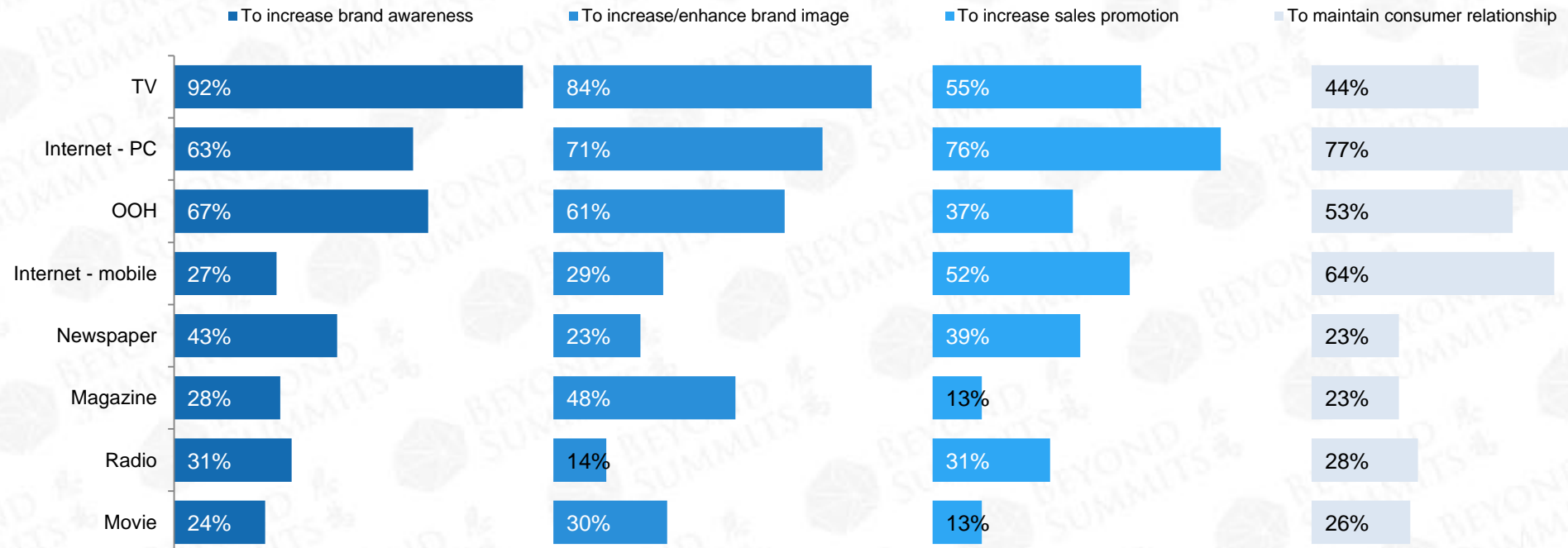
Source : CTR 2015 Advertiser & Ads report



When talking about marketing function, TV will focus on brand image building while Internet will focus on sales promotion and interactions.

Companies will hold different marketing purposes and motivations when selecting proper media, thus different advertiser will have different tendency.

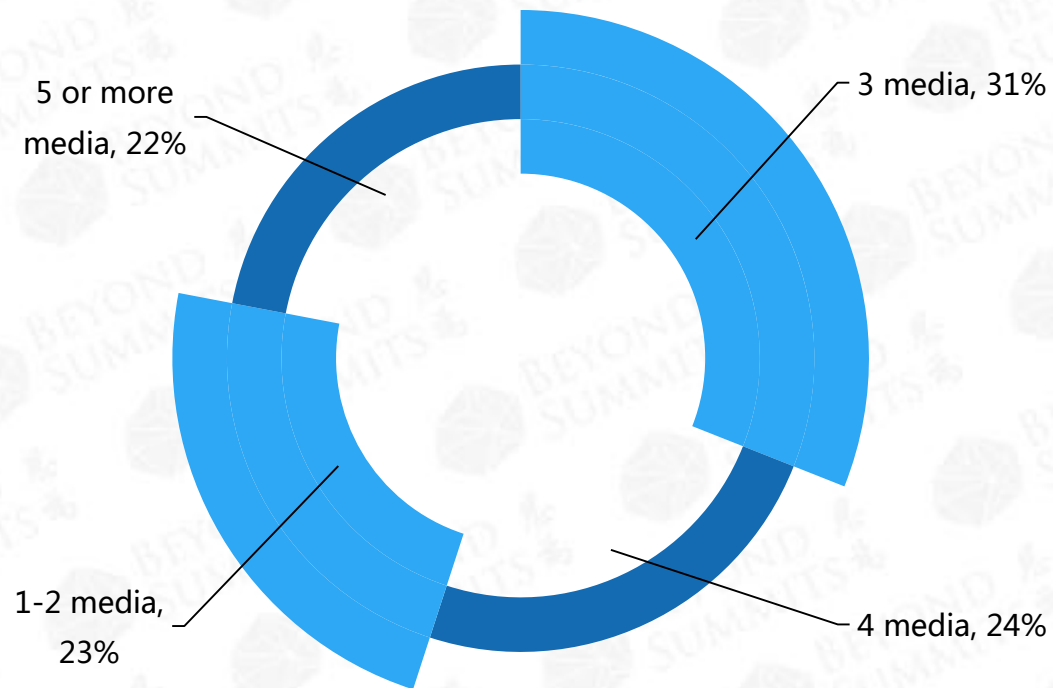
Advertisers' marketing purpose			
To increase brand awareness	To increase/enhance brand image	To increase sales promotion	To maintain consumer relationship
24%	27%	30%	19%



Source : Millward Brown & media360's CMO survey on China's leading company

Integrated marketing has become the basic approach in digital marketing, a combination of 3 or 4 media is the most popular portfolio.

**Preferred media numbers in integrated marketing 2015**



Source : Hylink Digital Marketing Research 2015 digital marketing trend survey on advertisers

2015 China Overview, covering Chinese economy, media and markets, is a set of yearly research report conducted and published by Beyond Summits Ltd, a leading all-media total solution provider focused on cross-border brand building & destination marketing in China. This report aims to summarize domestic industries' status in 2015, introduce Chinese market knowledge to overseas stakeholders, and propose Chinese market insights. The whole set of China Overview includes 20 sub-topics including economy, city, people, the rich, luxury, investment, auto, tourism, immigration and cross-border business, as well as Chinese all media, internet, mobile internet, social media, TV, radio, print, OOH, movie and airport.

This report is the full version of 2014-2015 China Overview All Media Research. More reports can be downloaded from Beyond Summits' official website link: [http://www.beyonddsummits.com/reports\\_downloading](http://www.beyonddsummits.com/reports_downloading)

## Contact Beyond Summits

### Shanghai Office

Add: RM.701, Jing'An Modern Industrial Park, No. 68 Changping Rd., Shanghai, China  
Tel: +86 021 - 6199 2660  
Fax: +86 021 - 3100 1328  
Email: [info@beyonddsummits.com](mailto:info@beyonddsummits.com)

### Beijing Office

Add: 1st Floor East Side, Building 8, Andingmen East Binhe Road No. 1, Hangxing Industrial Park, Dongcheng District, Beijing, China  
Tel: +86 010 - 5619 2032  
Fax: +86 010 - 5166 7658  
Email: [info@beyonddsummits.com](mailto:info@beyonddsummits.com)

## Official WeChat Account : BSL思为跨境营销



Your Global All-media Marketer



长按二维码识别关注





*Your Global All-media Marketer*

Visit our website to learn more: [www.beyonddsummits.com](http://www.beyonddsummits.com)

We have collaborating offices in

· SH · BJ · HK · TYO · SEL · SYD · MOS · BER · LON · PAR · ROM · NYC · SF ·