

# 中国媒体概览 China Media Overview



# Print

## Summary :

- Both the media reach rate and advertisement expenditures of newspaper users have decreased yearly. The newspaper readers are even shortening their reading time, which leads to a huge cut of heavy/medium newspaper reader proportion.
- Digital era's coming is reflected by the changes of readers (aging issue of readers). Also the industrial pressure (industrial competitiveness, impact of new media) challenges the newspaper media significantly, which results in the huge cut of newspaper ads.
- Like newspaper media, the media contact rate and ads expenditures of magazines have also decreased year by year. Journals are faced with several issues such as sever homogenization, huge amount of new journal's entry and impact from Internet new media, all of which are leading to a sharp fall of magazines' ads volume.

## Newspaper' features

The advantages of newspaper as a leading role in the media market:

- The authenticity of news and the credibility of publisher makes newspaper enjoy very high authoritative and trustworthy.
- Easy to carry, low price and the layout language's re-editing on news, all of above make newspaper unique comparing to other media.
- Some readers have formed a habit of acquiring news through reading newspaper, which is hard to change or switch.
- Newspaper has large circulation, covering huge geographic area in all domestic markets.

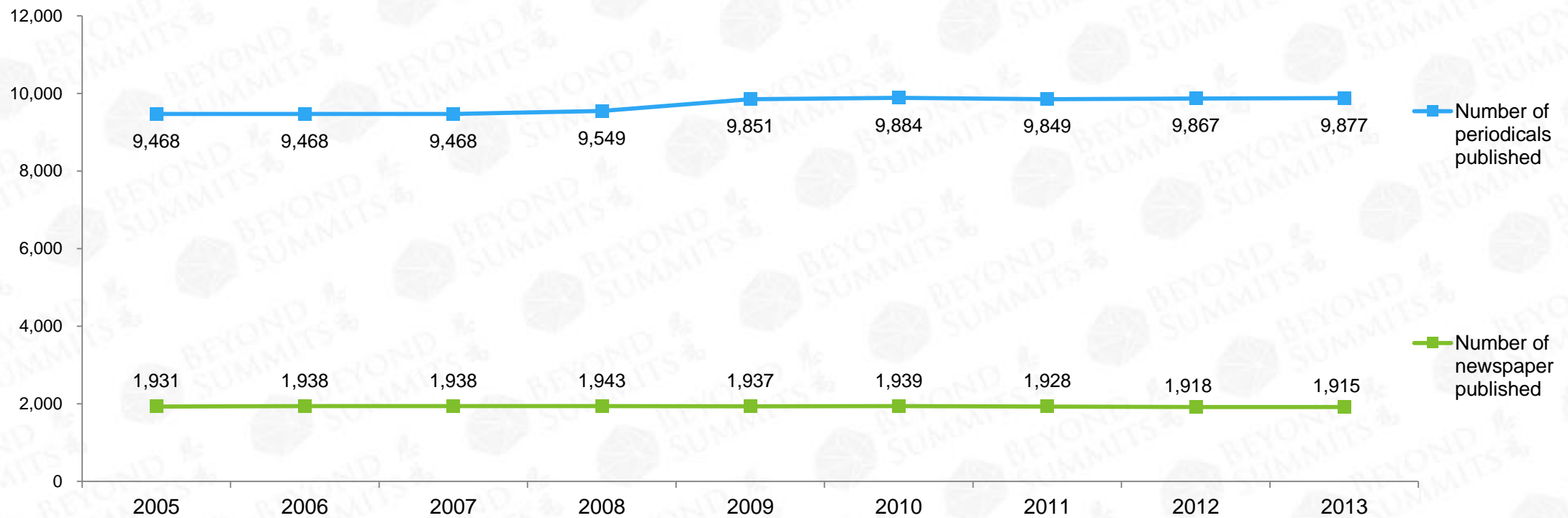
Newspaper also has its own disadvantages

- Monotony in format, lack of flexibility and novelty.
- Has few authority to certify an authentic circulation.



Since 2009, the number of China's print media has merely changed.

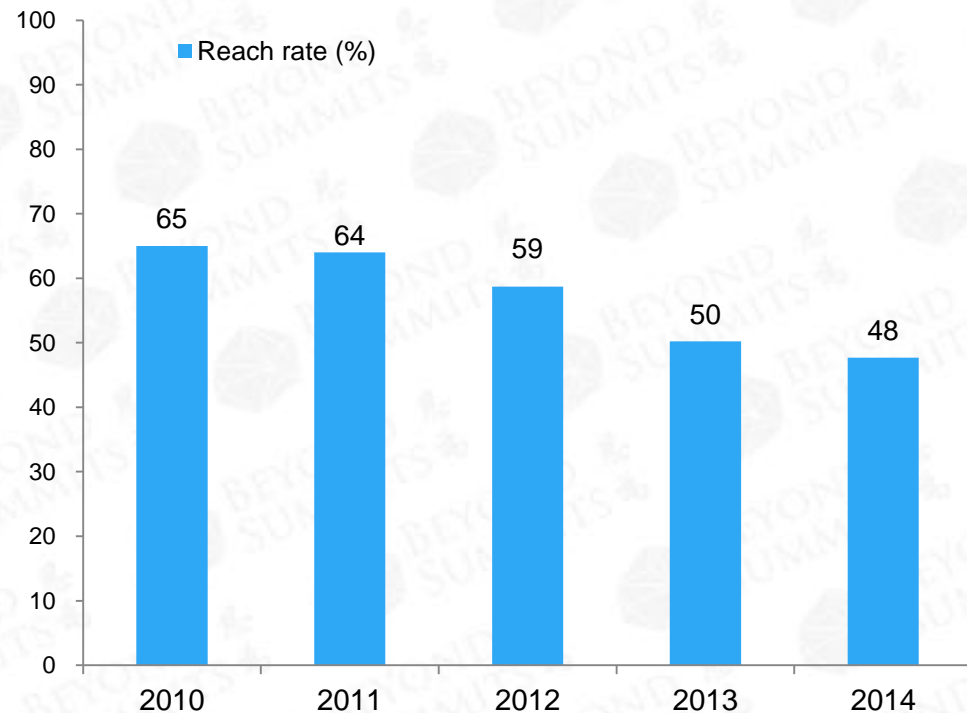
### Total number of periodicals & newspaper published from 2005-2013



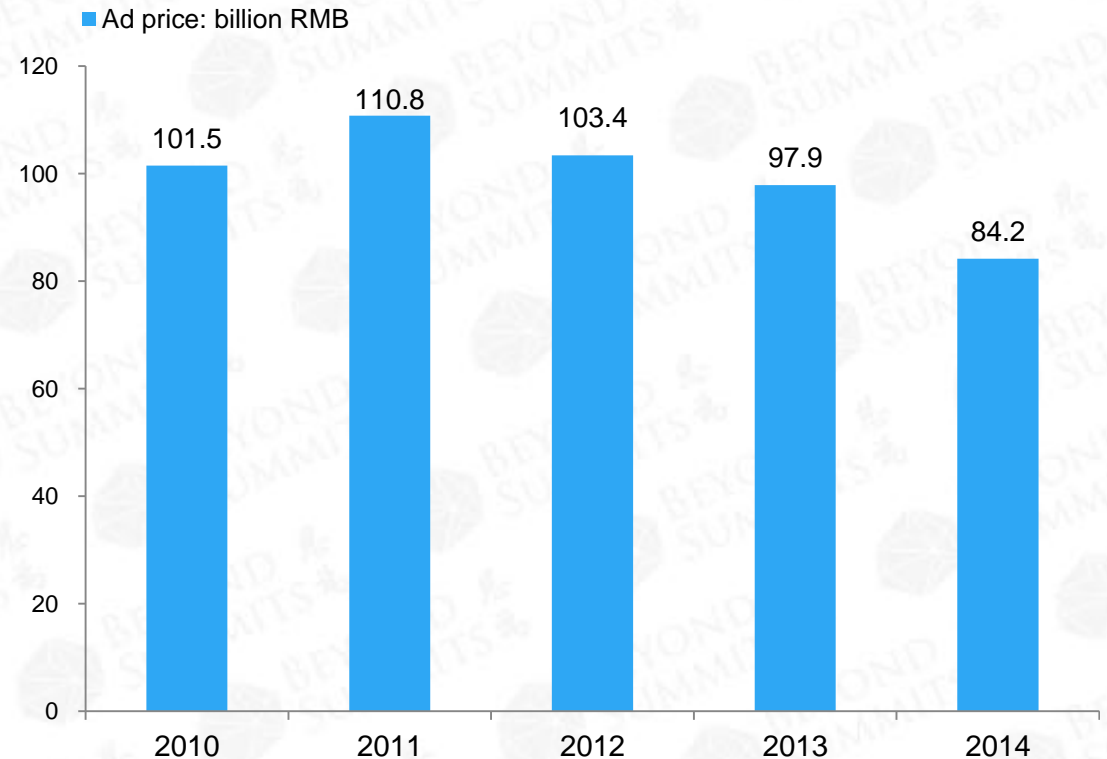
Source: China's National Bureau of Statistics

Newspaper's reach rate on readers, as well as the ad expenditures on newspaper are gradually decreasing.

Reach rate of newspaper



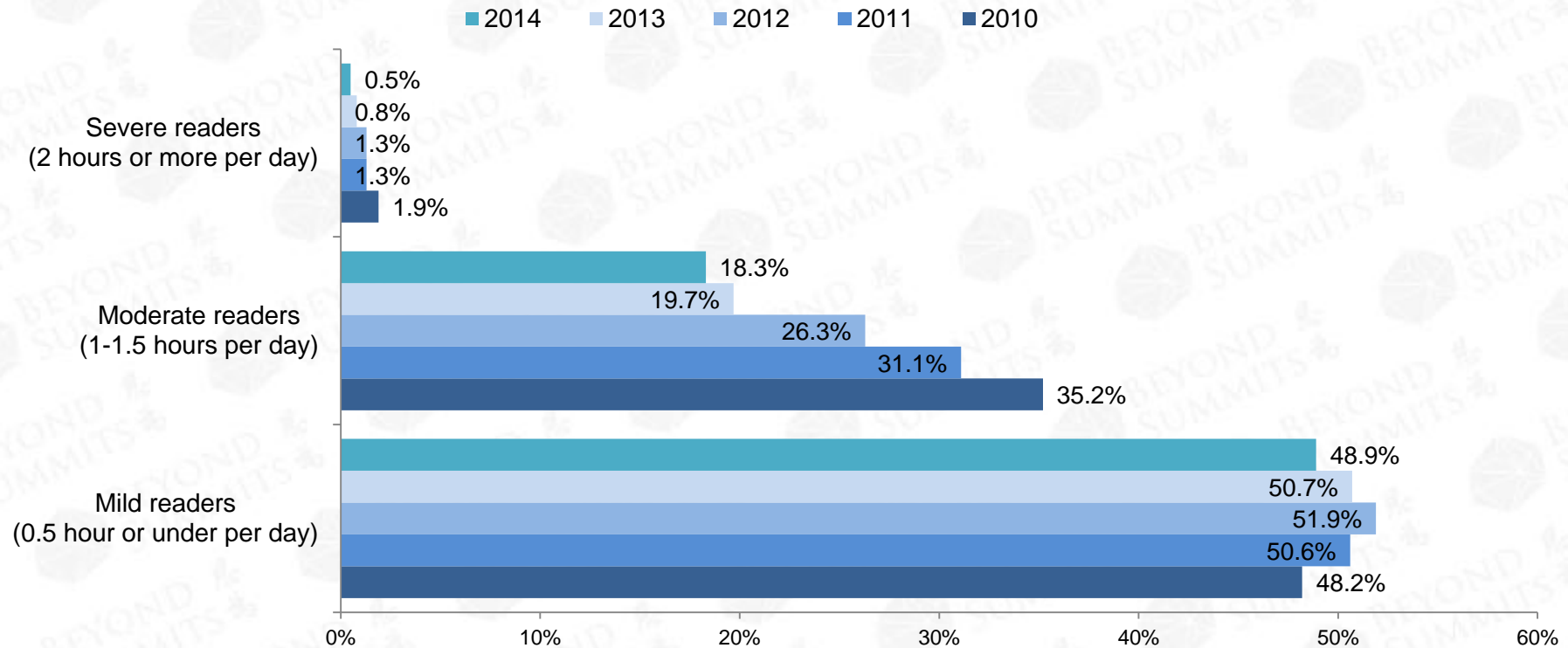
Ad expenditures trend of newspaper



Source: CMMS+CTR,Nationwide,P35-50

Time spent on newspaper is decreasing as well, share of readers that enjoy moderate/severe reading habit is falling sharply.

### Newspaper readers' reading habit



Source: CMMS+CTR, Nationwide, P35-50

## Future pressure on newspaper media – from audience

Today, the society has officially entered in a digital age, when, where and how readers, especially new-generation ones, acquire news have changed greatly.

- No more depending on reading newspaper in the morning to acquire news and information.
- No more parents-like tone when newspaper is telling about what's important.
- Informed with news that they want only, which should update constantly.
- Not only want to know what is happening, but also want to know why it's happening.
- Expect to have news that is relevant to their own life.
- Expect those news to be the conversation starters, which can be used to chat and socialize with new friends in a much bigger community.





## Future pressure on newspaper media – from market

The digital era has arrived, which means the readers are changing, the industry itself is also changing that will bring challenges upon newspapers.

- The homogenization of contents and operation patterns will lead to newspapers being highly replaceable, with low profit.
- New media will stream and acquire a lot of ads and audience from the existed market.



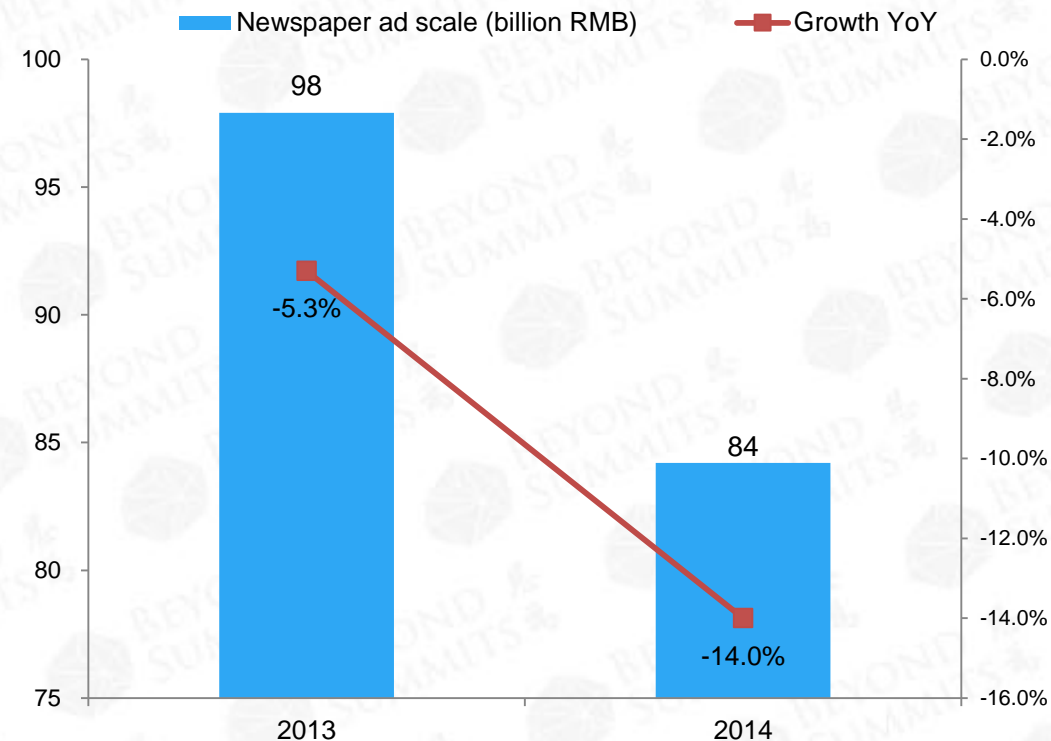
Ads expenditures on newspaper is facing with sharp shrinking situation.

**Media advertising expenditures and resources in 2014**

Media	Advertising expenditures	Resources
	YoY	YoY
TV	-0.5%	-11%
<b>Print</b>	<b>-18%</b>	<b>-21%</b>
Radio	-10%	-19%
Traditional OOH	9%	-3%
Videos in buildings	26%	-
Videos in cinemas	62%	-
Videos in transportations	-2%	-
Internet	36%	-

Source: CTR MI

**Newspaper ad scale and growth in 2014**



Source: CMMS+CTR,Nationwide,P35-50

## Magazines' features

Magazine keeps certain growth and owns market based of followings.

- Fine print with rich colors, arise audience's desire to read.
- The content is segmented, which allows readers to actively select and choose targeted magazines based on their interests.
- Magazine can be read repeatedly and kept for a long time, which make it worth of collectible.
- Magazine will be frequently circulated by a lot of audience.

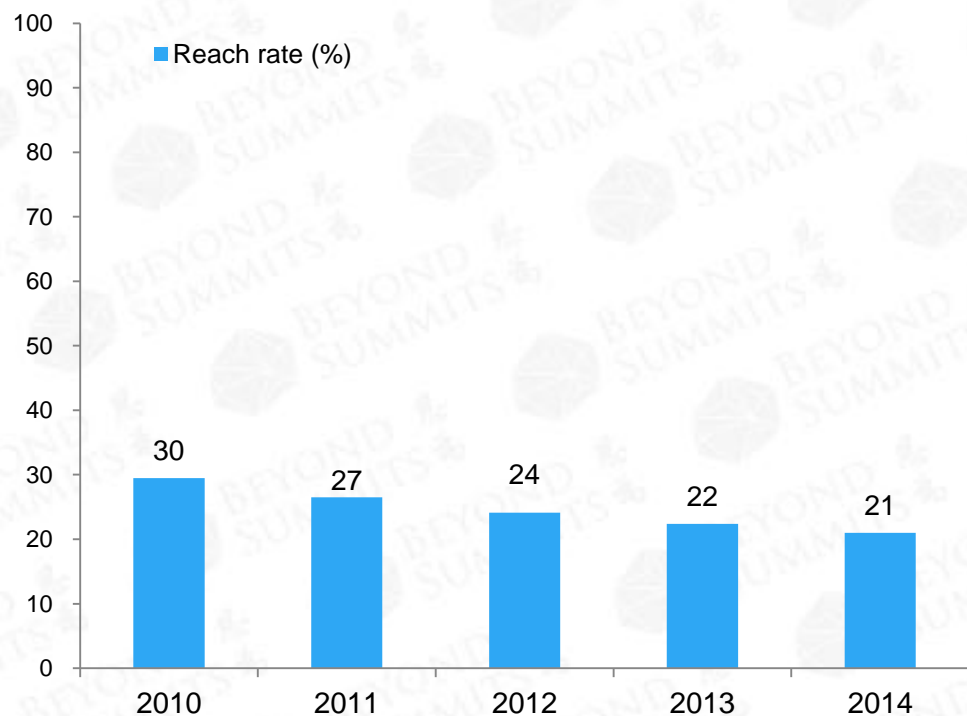
But magazine has its own inherent weaknesses

- Expensive to purchase, most magazines priced from 10 to 20 RMB, some even higher.
- Most magazines' circulation is faked and not certificated and audited by any authorities, except several ones.
- The preparation time to launch ads on magazines is so long that will take 1-2 months before print.

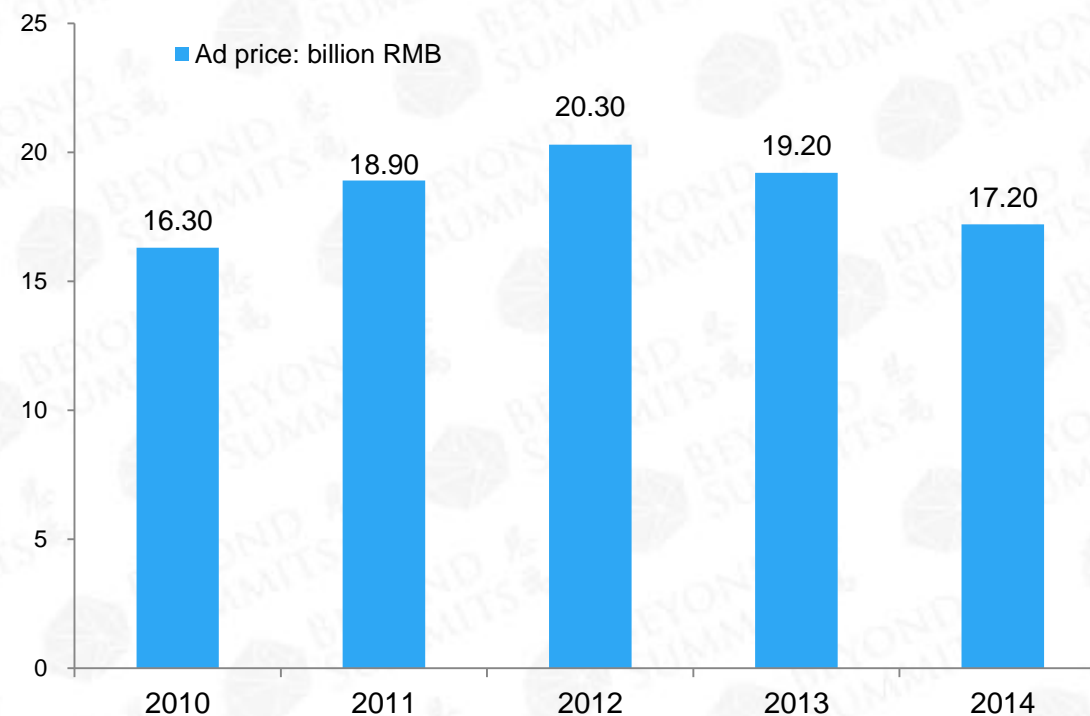


Magazine's reach rate on readers, and the ad expenditures on magazines are gradually decreasing.

Reach rate of periodicals



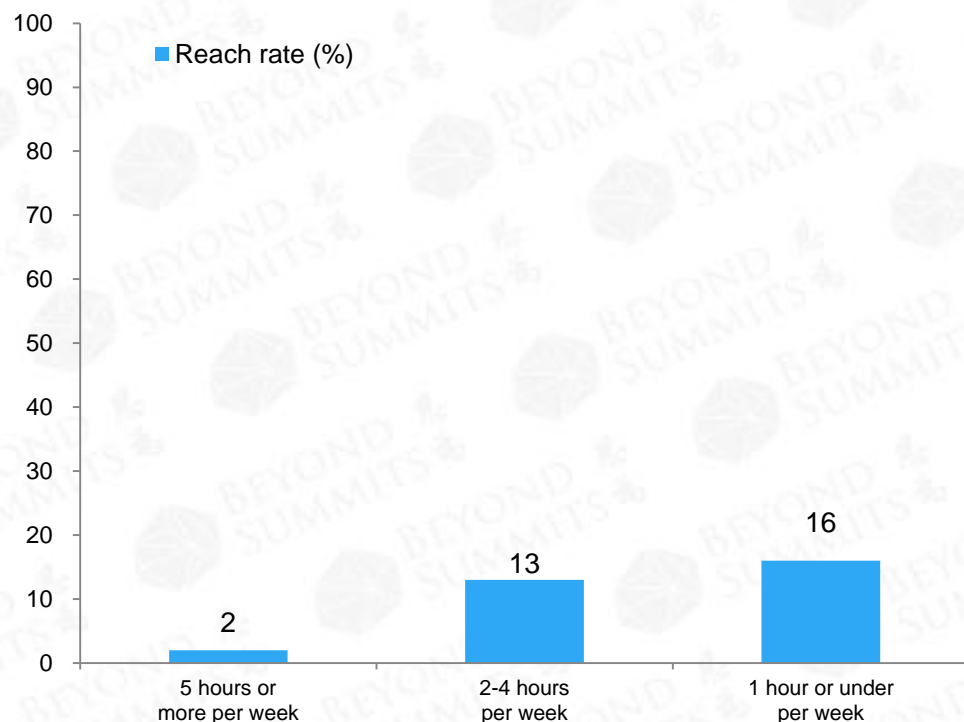
Ad expenditures trend of periodicals



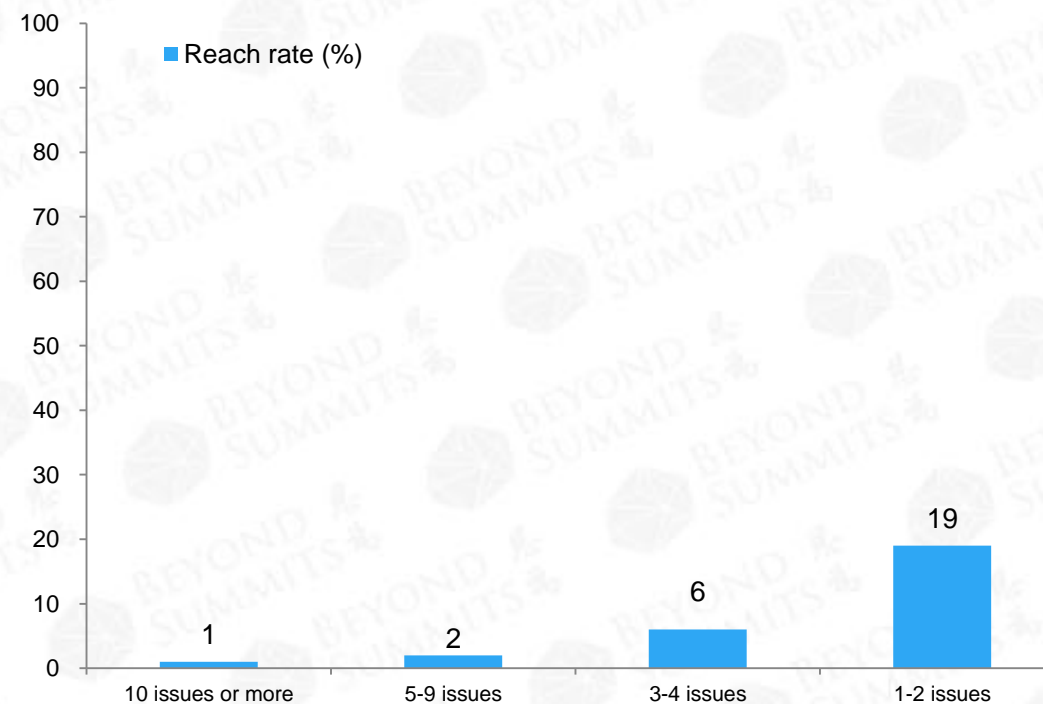
Source: CMMS+CTR,Nationwide,P35-50

Readers will spend one hour per week on magazines, most will finish reading 1-2 issues per month.

**Weekly time spent on periodicals media**



**Monthly periodicals to finish reading**



Source: CMMS,2014,Nationwide,P35-50

## Future pressures on magazine media

### **The homogeneity phenomenon of the periodicals is getting more and more serious**

- A lot of magazines share same category with redundant contents, hard for consumers to tell.

### **Market competition is highly fierce.**

- New magazines keep entering the market, existed ones can't respond to market demands, a lot is facing elimination.

### **Impacts from new media**

- The impact from online media and new media has changed consumers' original reading patterns, new form of media is getting popular.



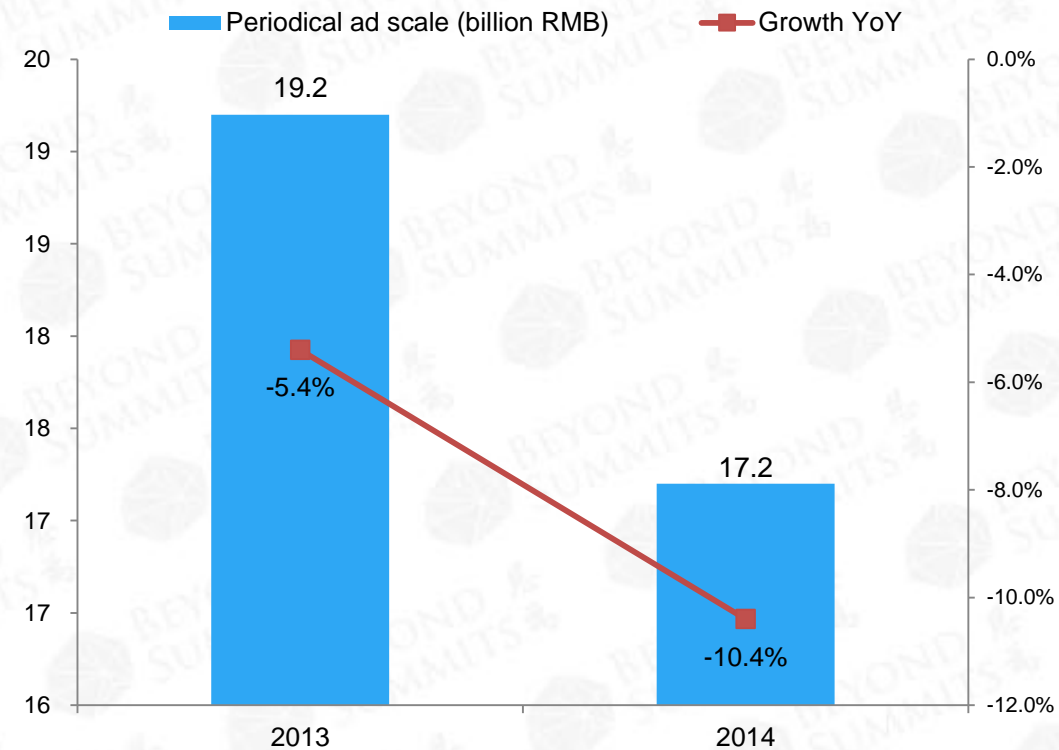
Like newspaper, magazines and periodicals are facing a situation that ad scale is sharply decreasing.

**Media advertising expenditures and resources in 2014**

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Source: CTR MI

**Periodical ad scale and growth in 2014**

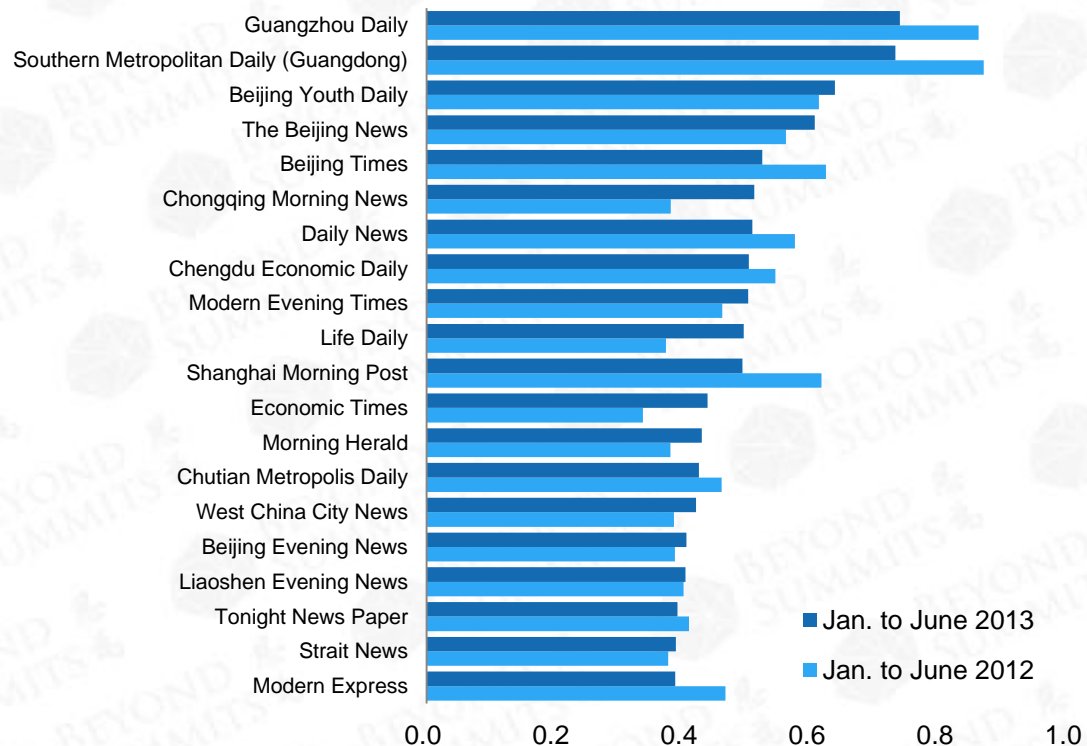


Source: CMMS+CTR, Nationwide, P35-50

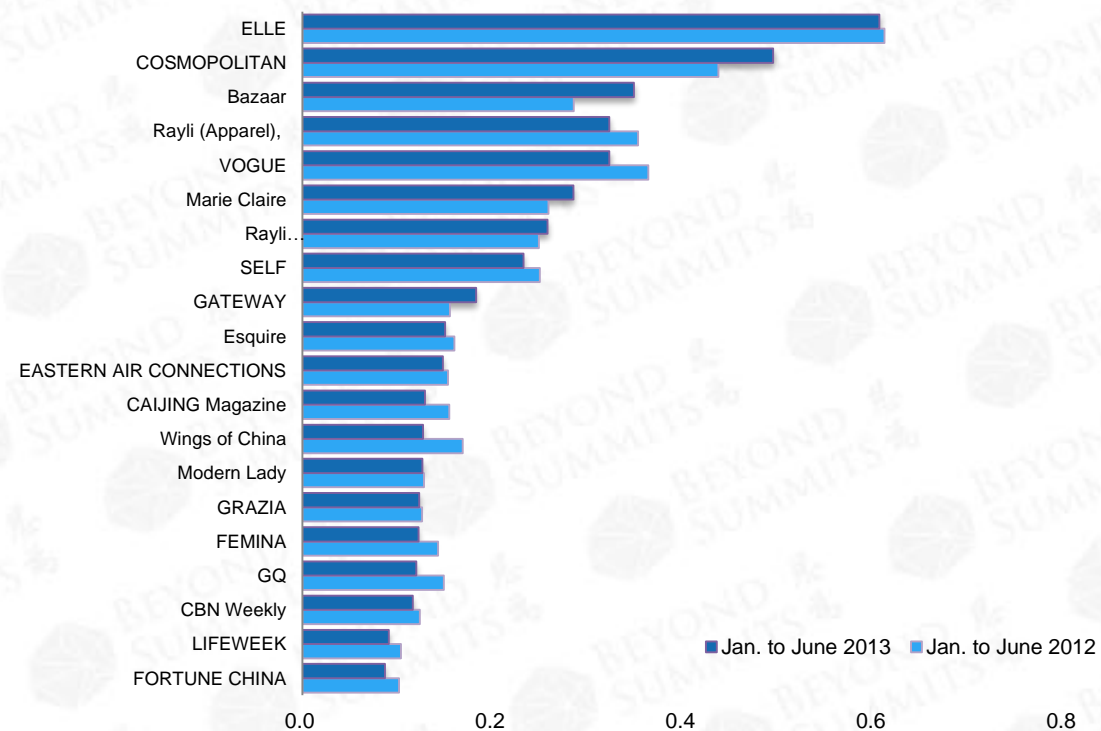
Print media's whole competitiveness is slipping, the ads launched on print is increasingly concentrated.

Top20 newspaper's ad scale takes 1/3 of total, top20 newspaper's ad scale has even exceeded 50% of total. The resources are tilting toward media with great influence, especially on fashion/high-end magazines.

TOP20 Newspaper (billion RMB)



TOP20 Magazine (billion RMB)



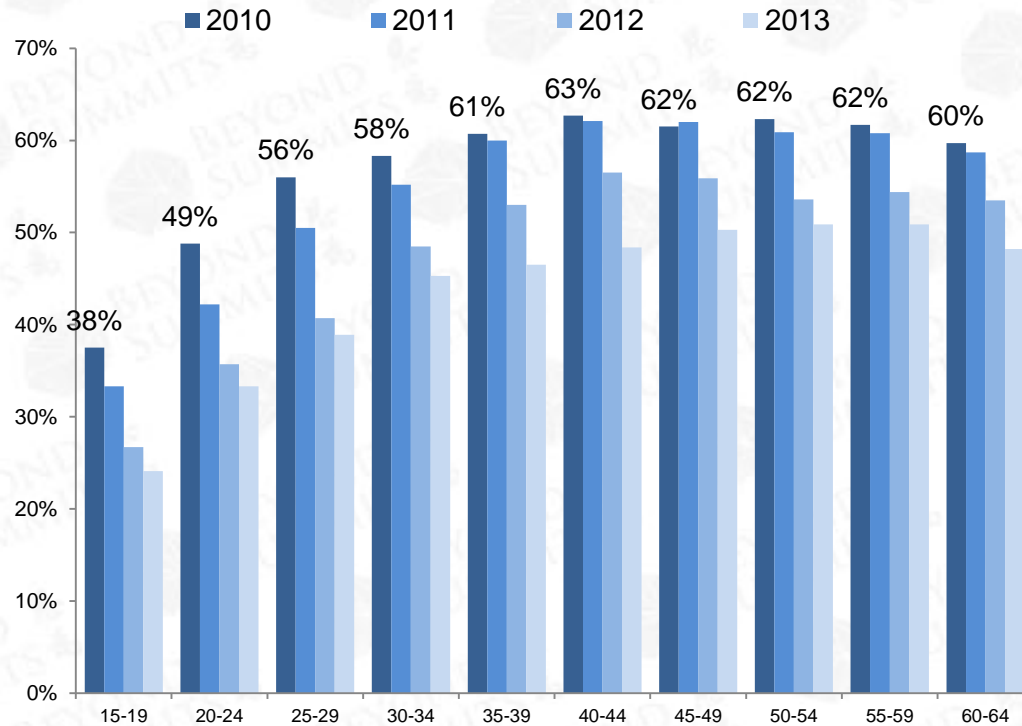
Source : CTR-AdEx Power. Ads data excludes media's self promotion or free resource.



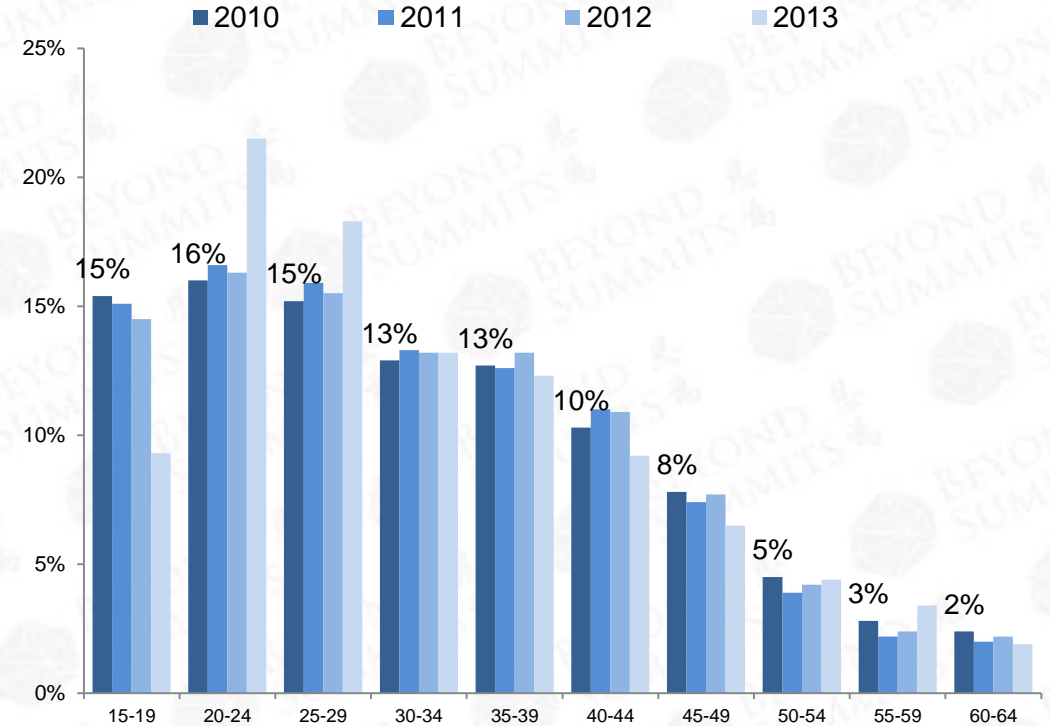
Print media consumers are getting aged.

Compare to newspaper, magazine's readers tend to be slightly younger, newspaper's audience is facing aging problem.

Newspaper reader's age distribution from 2010 to 2013



Magazine reader's age distribution from 2010 to 2013



Source : Sinomonitor CMMS 2010-2013 data(Spring)

## 2014 China Top30 Magazines

High Price Fashion:

Rayli (Apparel & Cosmetics), Bazaar,  
Rayli(Career Women), COSMOPOLITAN,  
Rayli (Fashion), VOGUE, ViVi

Female Fashion:

SELF, Girlfriends, Homeland

Male:

FHM, LEON

House & Furniture:

RayliHome, Trendshome

Mothers and Babies:

Parenting Science, MumBaby, Family & Childcare

Digests:

Special Focus

Finance:

China Finance, China Tobacco, China Brands

Aerospace Machinery:

Wings of China, GATEWAY, NewAir, Expression

Autos:

Orient Auto, Auto Life, Auto Fan

General:

Food Weekly

Photography:

Portrait Photography

Collections:

Art Market

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 Print Research. More reports can be downloaded from Beyond Summits' official website link: [http://www.beyondsummits.com/reports\\_downloading](http://www.beyondsummits.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@beyondsummits.com](mailto:info@beyondsummits.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@beyondsummits.com](mailto:info@beyondsummits.com)

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