

中国媒体概览 China Media Overview



Radio

Summary :

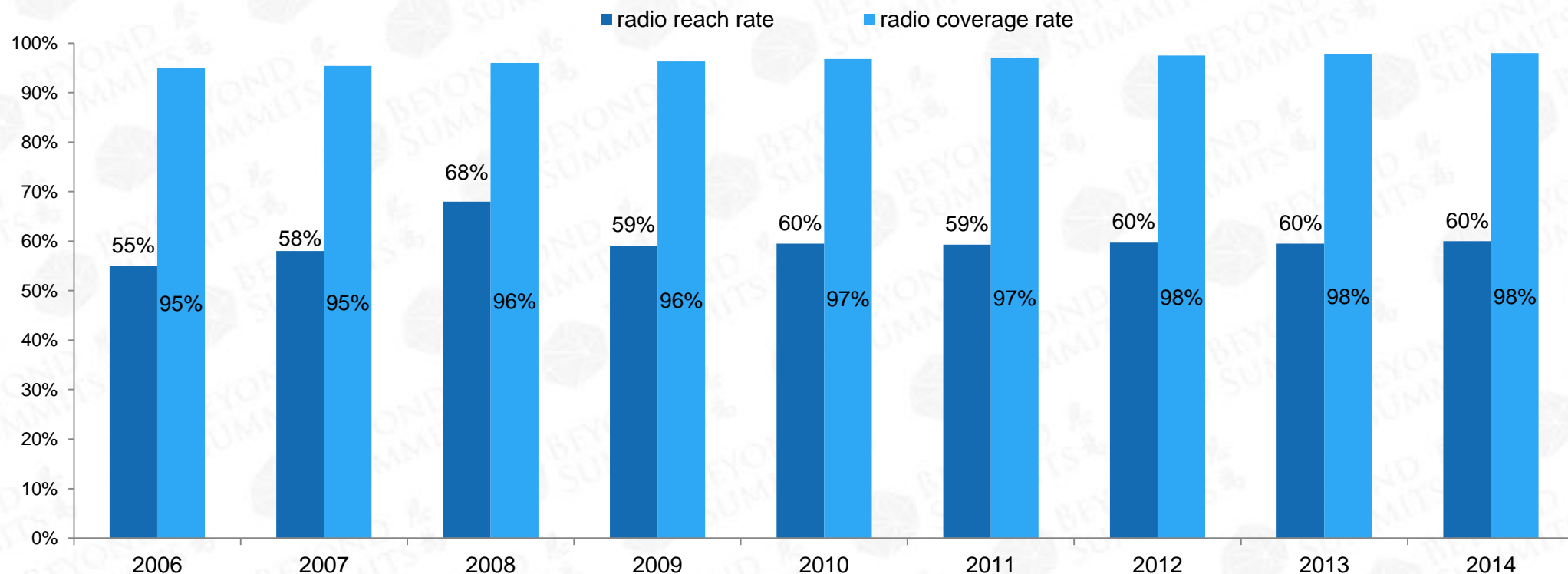
- The coverage rate of Chinese broadcasting is almost 90%. The audience with listening behavior and habit accounts for only 60%. Only half of Chinese are fans of radios now.
- Currently, increasingly more urban listeners prefer digital devices, such as cell phones, vehicle-mounted systems and PCs. Traditional radios are inevitably fading nowadays. The listeners listen to the radios at home and in automobiles, but daily listening duration has been shortened in these years.
- Listeners who listen to the radios in automobiles has outnumbered the listeners who listen at home. Meanwhile, with the popularity of mobile broadcasting APPs, more people choose to utilize these APPs to listen to the radios out of door.
- The radio listening peak presented at commuter time, which further proves the popularity of vehicle-mounted systems and mobile radio APPs.

Summary :

- The most listened contents are traffic situation, music and news. Traditional radio listeners prefer news content, while users of vehicle-mounted systems are incline to listen to the contents related to traffic situation. The most public channels are on provincial and city levels.
- Content marketing has become the new trend of future broadcasting advertising. Besides the hard-sell ads, integrated marketing solutions will be needed on future broadcasting media platform. Additionally, future integrated marketing tends to be more customized, which means every client will be serviced by customized marketing solution catering his/her own needs.

China radio's coverage rate is close to 100%, but its reach rate has remained around 60% for years.

China radio's reach rate VS coverage rate from 2000 to 2013



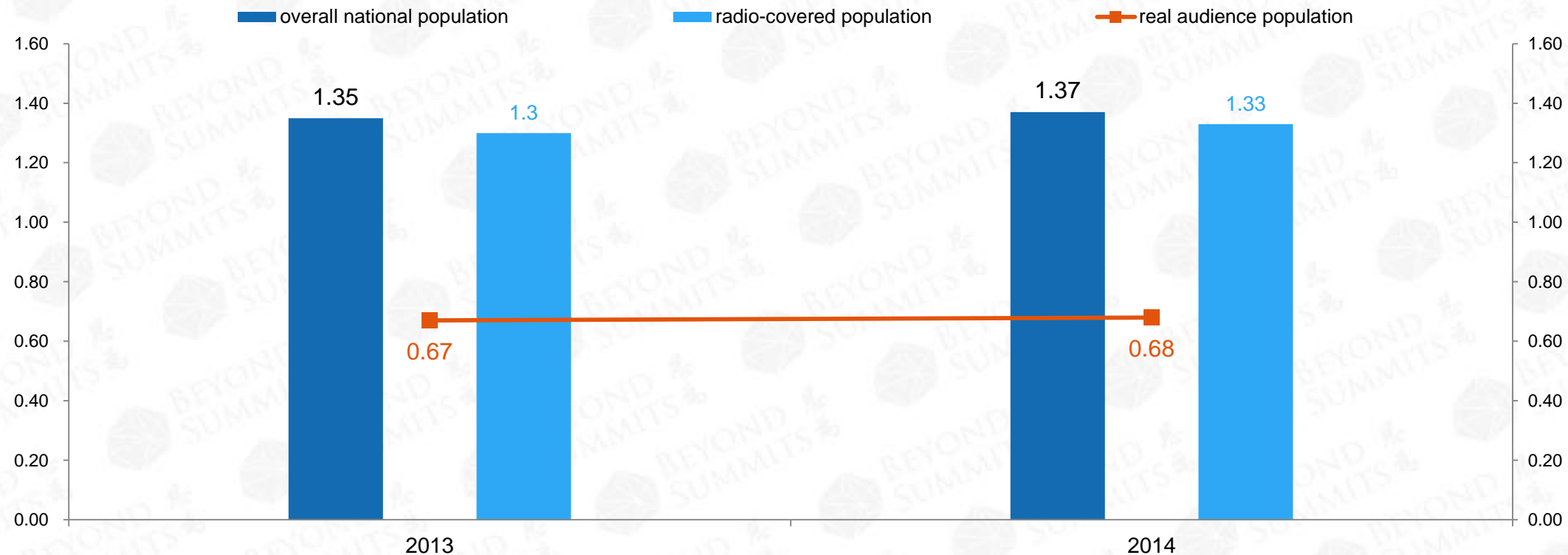
Source: SMR media research, National Bureau of Statistic

Reach rate: those who have radio-listen action in the past month/those who have access to radio

Coverage rate: those who are covered by radio signals in a specific area/the overall population in that area

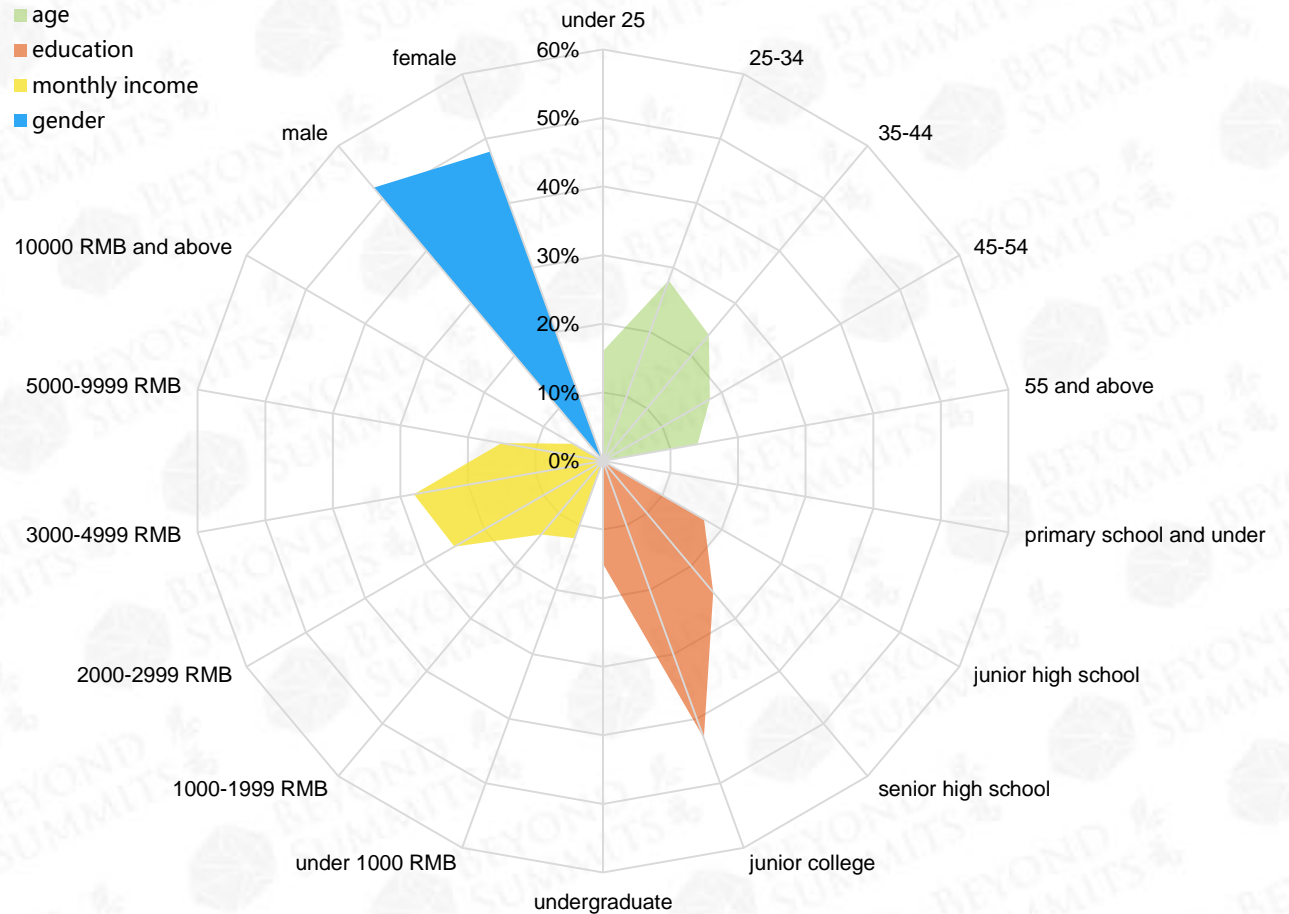
Only half of Chinese are radio's real audience.

China radio audience scale (billions)



Source: SMR 2013-14 China radio market overview

China radio urban users' demographics



Users aging from 25 to 44 years old are radio's mainstream audience.

As regard to educational level, most users are senior high school and junior college.

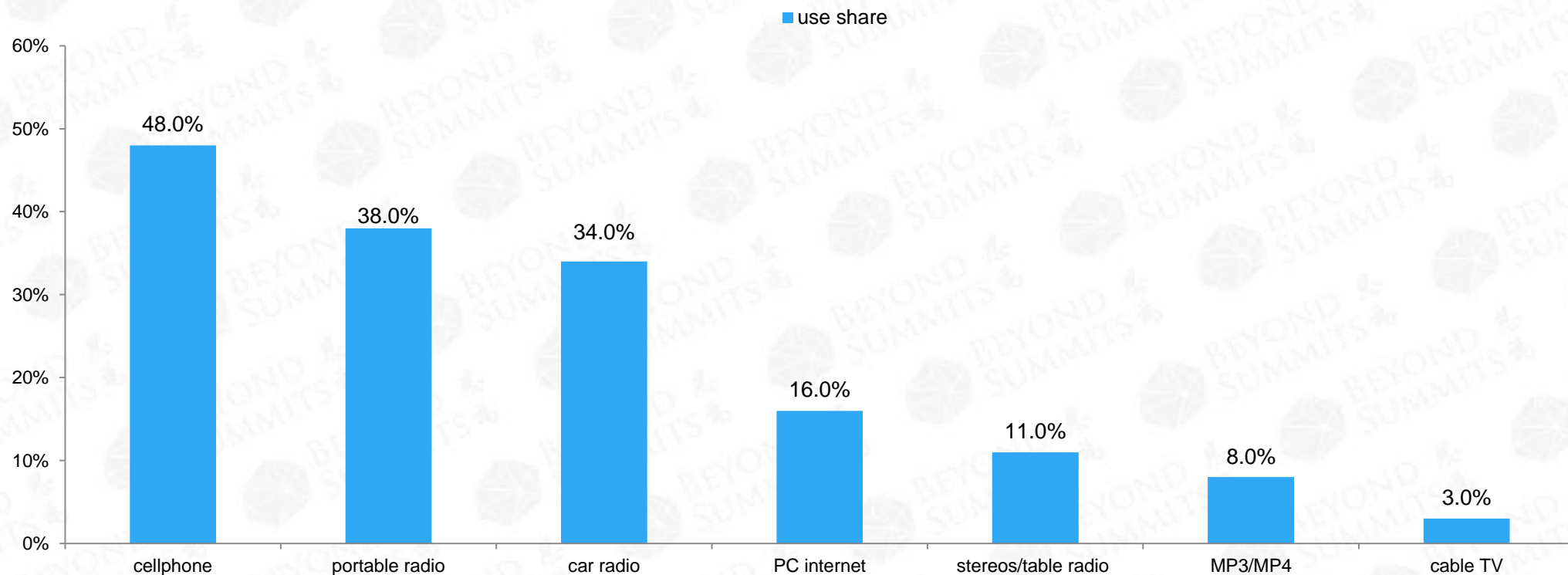
Most of them have monthly income of RMB3000-5000

More male users than female.

Source: SMR Tool data among urban radio users in 2013

In cities, more and more users choose to listen radio via cellphone, car radio, PC or other digital devices. Traditional radio's user scale is shrinking.

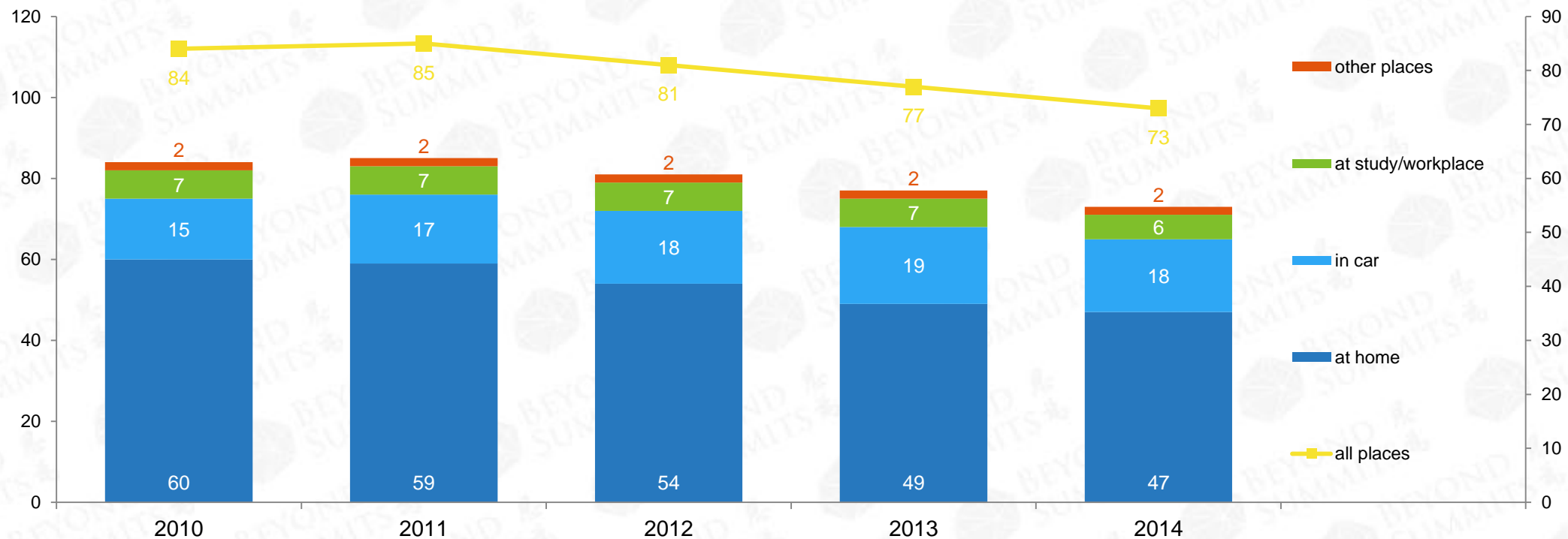
Tools for urban users to listen radio in 2013



Source: SMR Tool data among urban radio users in 2013

Radio users prefer to enjoy their listening time at home or in their cars, but the length has been decreasing gradually these years.

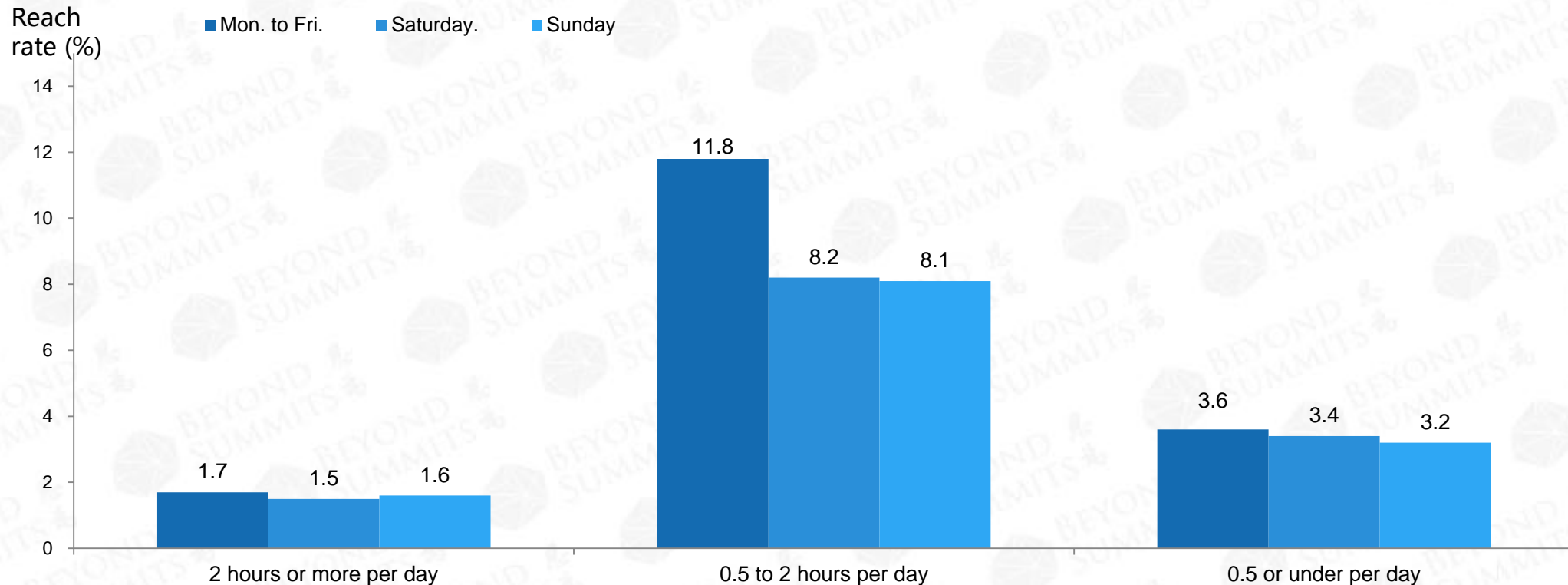
Daily length of radio-listening behavior by different place (mins)



Source: SMR 2014 China radio and broadcast market review

Most radio listeners would spend 0.5 to 2 hours on listening per day, which matches users commuting time window.

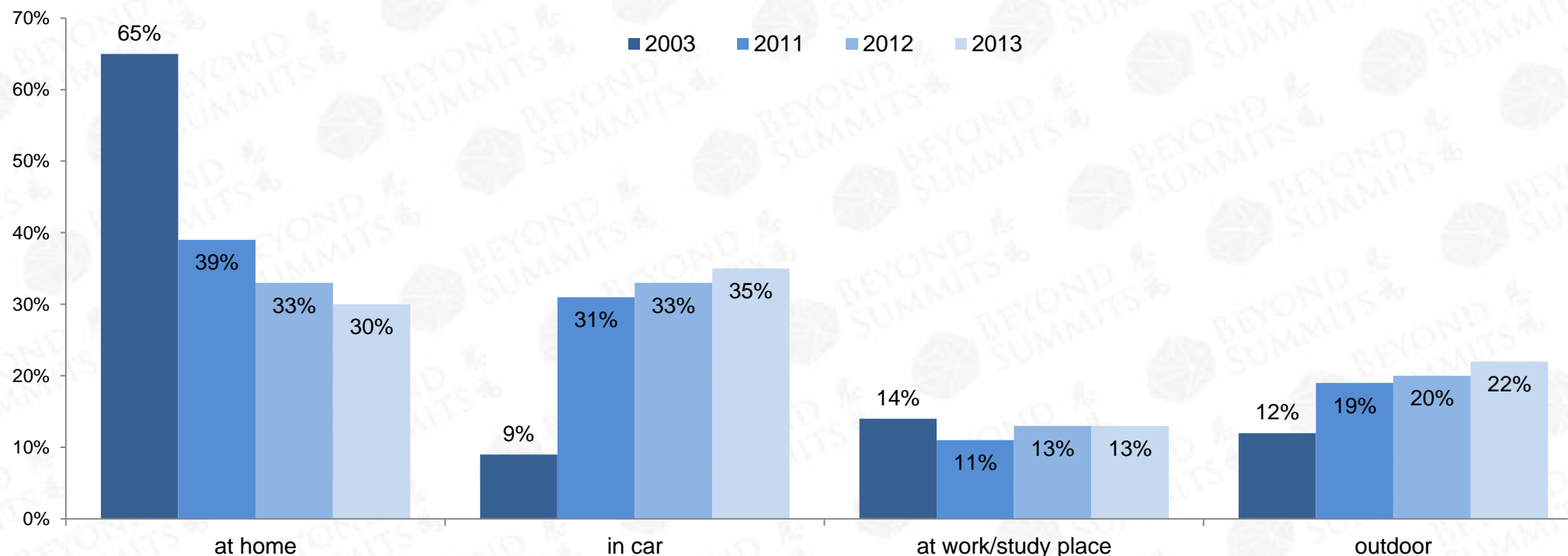
Radio media's daily reach rate



Source: CMMS, 2014, Nationwide, P35-50

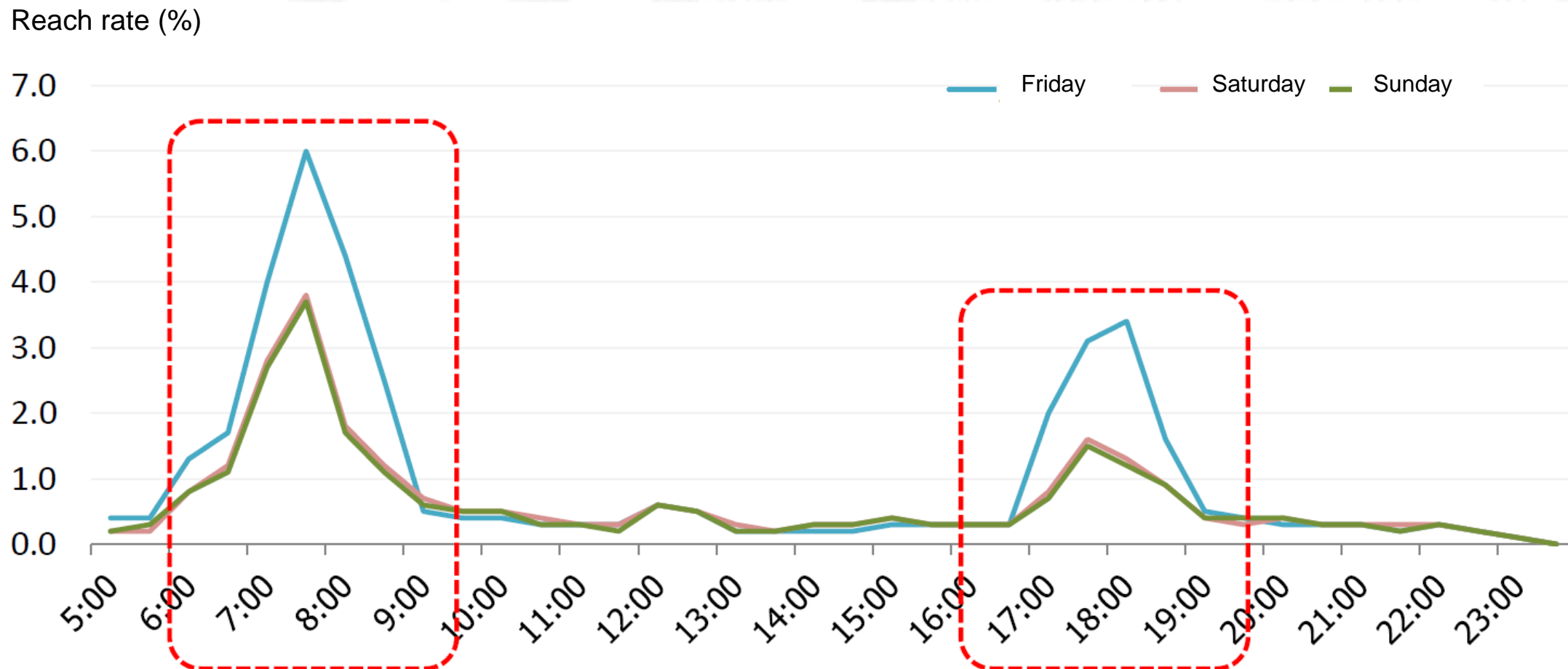
In these years, the amount of people that listen radio in car has exceeded the amount that listen at home. As the mobile radio APP goes popular, there has been increasingly more outdoor radio listeners.

Place of listening to the radio contents by users in the past decade



Source: SMR 2013 China radio and broadcast market review

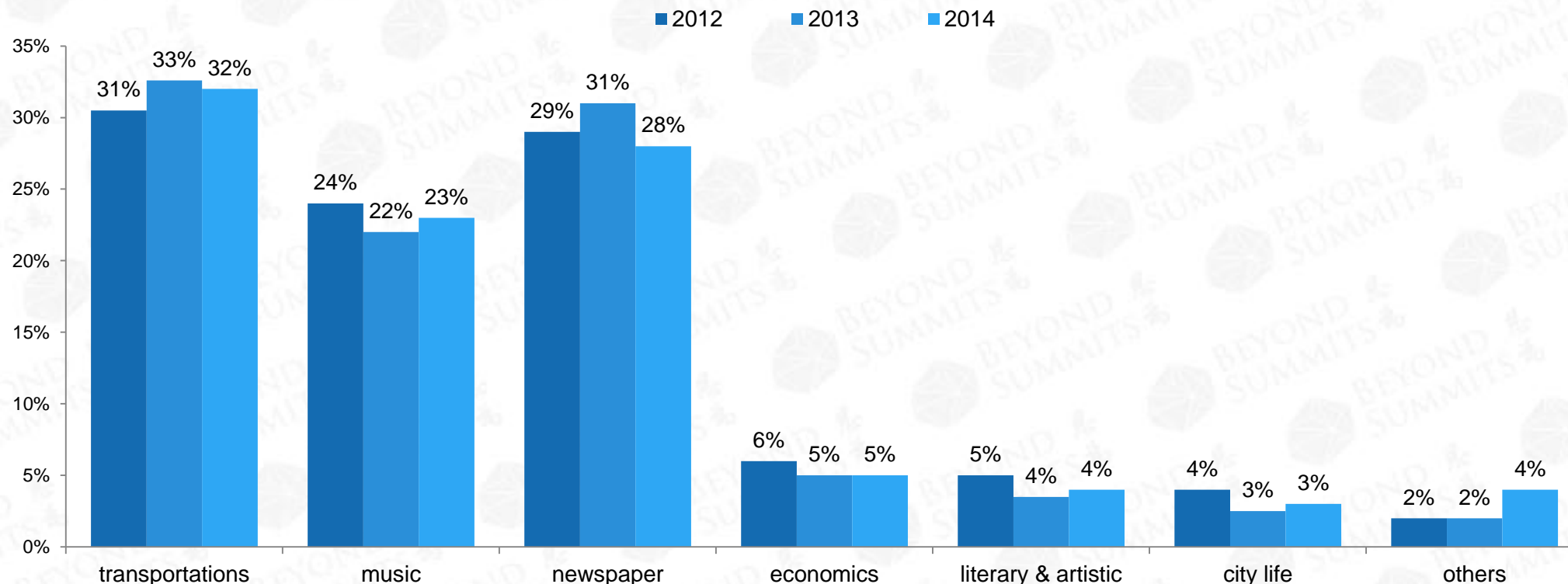
The listening peak appears in the commuting rush hour, which proves the popularity of car radio.



Source: CMMS, 2014, Nationwide, P35-50

For radio users, transportations, music and news intelligence are the most listened and popular content categories.

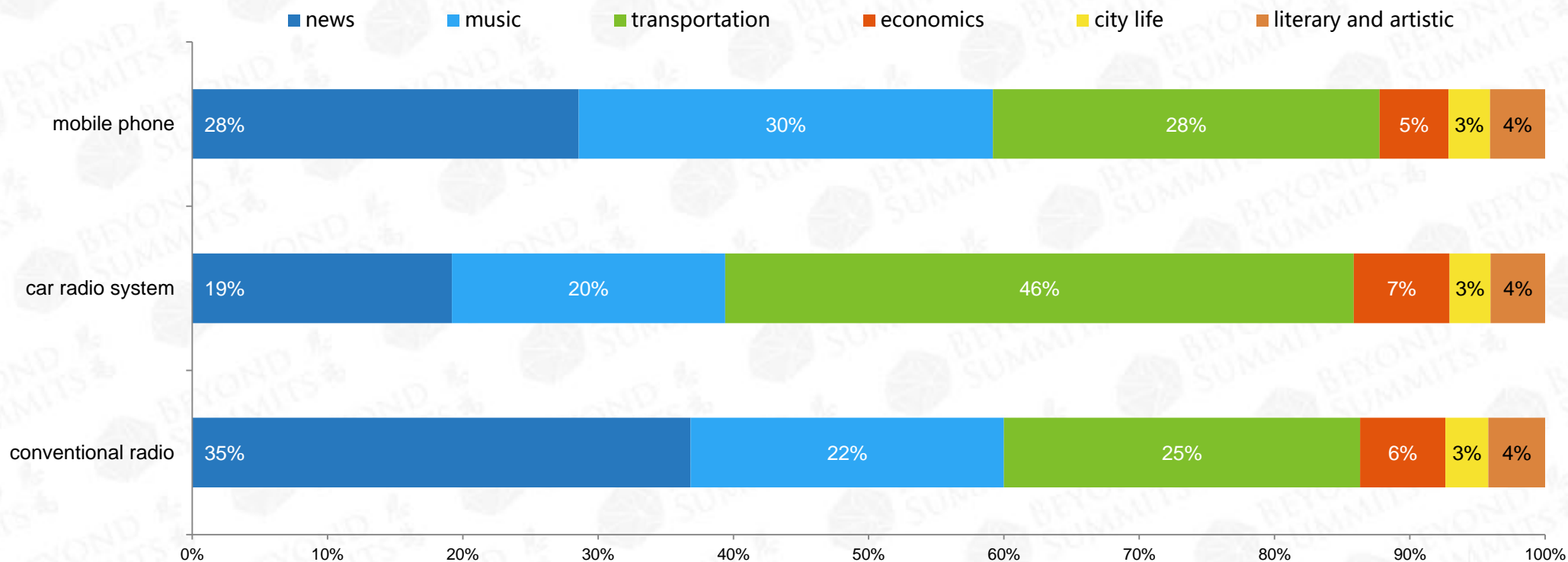
Different channels' market share in China from 2012 to 2014



Source: SMR 2014 China radio and broadcast market review

Conventional radio's users tend to favor news while car radio users prefer contents related to transportations.

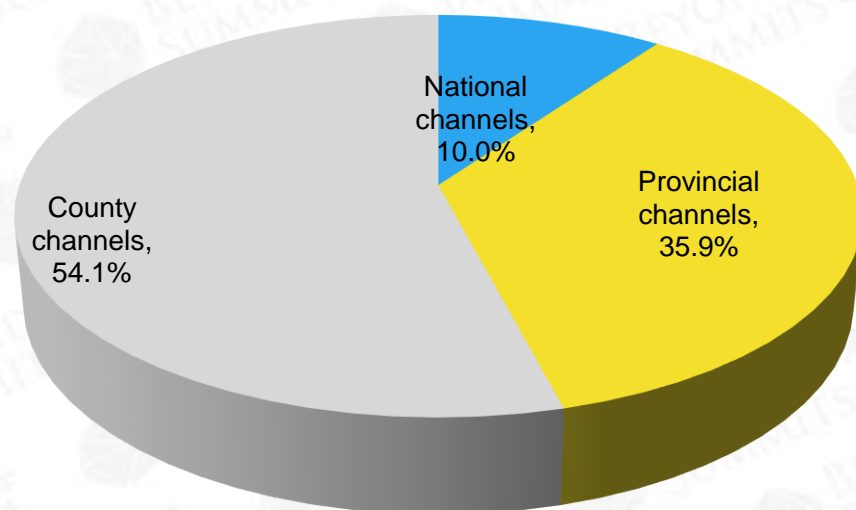
Different channels' market share by different device in 2014



Source: SMR 2014 China radio and broadcast market review

In terms of radio market setup, provincial radios are the main channels for audience to listen to.

Different levels of radio 's market share in 2014



Different regions' radio market share in 2013

	North east	North	East	Central	North west	South	South west
National channels	13.2%	19.5%	6.6%	6.8%	12.5%	5.5%	7.2%
Provincial channels	45.6%	30.1%	37.2%	41.3%	40.2%	24.0%	42.2%
County channels	41.2%	50.4%	56.2%	51.9%	47.3%	70.5%	50.6%

Source: SMR 2014 China radio and broadcast market review

Radio ads delivery is focusing on traffic channels and integrated channels, especially among tier-one cities.

Publish Price TOP 10 Radios (2013.Jan-Aug ; Unite : RMB 100 million)

1	Jiangsu Communication Radio Station http://www.vojs.cn/
2	China National Radio FM99.1
3	GuangDong Radio, Guangzhou Communication Station FM105.2
4	Zhejiang National Radio, Communication Station FM93
5	Heilongjiang National Radio, Communication Station FM99.8
6	Wenzhou National Radio, Communication Station FM103.9
7	Shanghai National Radio, Music Station FM 101.7
8	Guangzhou Communication Radio Station FM106.1
9	China National Radio, MusicRadio FM 90.0
10	Beijing National Radio, Communication Station FM103.9

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

The future development trends of radio media:

1. Content marketing will become the new trend in radio advertisement

- Radio media has its own unique audio charm.
- The way how radio media is used, how it appeals and infects, how valuable it is, all make content marketing the future trend in radio ad industry.

2. The customized integrated marketing solution will be hugely popular

- Besides hard-sell ads, radio media will target on integrated marketing solution.
- The future integrated marketing will tend to be customization, each client will have a personalized solution.

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 Radio Research. More reports can be downloaded from Beyond Summits' official website link: http://www.beyondsummits.com/reports_downloading

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