

China Online Video Industry Report, 2011

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Abstracts

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China online video market revenue in 2010 reached RMB 2.275 billion, up 170.2% over 2009. The main revenue source is still advertising, whose value is promoted steadily by the increasing online video users and browsing time. With the improving environment for copyright protection, the pay revenue will also gradually increase. In the next five years, the market size of online video industry will maintain a growth rate of over 30%.

China online video companies Ku6, Letv, Youku, Tudou and other companies involved in online video industry like Phoenix New Media and Xunlei went public successively. By virtue of powerful content, user and capital resources from their holding companies, CNTV, Sohu Video and Baidu Qiyi rose rapidly in 2010. In 2011, the competition in China's online video industry is more intense and the differentiation among business models of online video companies becomes more pronounced.

In terms of comprehensive index, such as revenue, number of users and content resources, video sharing companies Youku and Tudou are still in the first echelon of China online video companies. Due to heavy losses, video sharing company Ku6 will change its business strategy from huge copyright investment and high bandwidth construction to the development of video information business. As for other video sharing companies like 56.com, 6.cn and Baomihua.com, whose business is dominated by video information and community video, they need to share revenue with users and advertisers, and their content and bandwidth costs are relatively lower.

In the field of video on demand / live video, by virtue of the soaring revenue from copyright distribution, Letv achieved operating income of RMB 104.752 million in

2011Q1, up 131.99% YoY; and the net income reached RMB 29.0642 million, up 83.75% YoY. Sohu Video adopted the strategy of broadcasting popular movies or TV dramas exclusively resulting in pre-tax income of US\$ 33 million in 2010, about three times as much as in 2009. Mainly engaged in genuine long video business with high bandwidth and content costs, Qiyi was at a loss. In 2010, Joy.cn obtained revenue of RMB 200 million, including membership fee income of about RMB 160 million.

In the field of P2P streaming media, Xunlei's video advertising business exceeded download business in revenue and realized profit in 2009. In 2011Q1, the bandwidth costs were RMB 14.93 million, up 104.0% YoY; the content costs were RMB 9.144 million, up 142.9% YoY. PPTV, PPStream and UUSee are three big companies in this field, and achieved annual revenue of nearly RMB 100 million in 2010, the content purchasing costs were RMB tens of millions or even more than RMB 100 million while the bandwidth costs were only about 5% of those of the video sharing websites.

Traditional media online video companies, including CNTV, SMG BB and Phoenix New Media, develop quickly relying on television stations' abundant content resources as well as brand advantages, and their main source of profit involves advertising, copyright distribution and the cooperation with telecom operators.

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