

# China TV Drama Industry Report, 2011-2012

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## Abstracts

TV drama industry is a policy-sensitive sector in China. From 2006 to 2010, the value of Chinese drama transactions increased from RMB4.85 billion to RMB5.92 billion, with a CAGR of just 5.11%. As the relevant policies relax as well as a variety of supportive policies are issued, China TV drama industry has been developing rapidly. In 2011, the transacted value of dramas in China reached RMB7.6 billion, up 28.37% from a year earlier. Presently, Chinese TV dramas are oversupplied, while excellent works are still in short supply, with the prices ever rising.

In the field of drama production, there are numerous Chinese drama production institutions, with a low market concentration degree. By 2011, there had been 4,678 drama production agencies in China, of which top 10 ones only contributed 11% to the output.

At present, driven by the market demand, some powerful Chinese drama production institutions start to adopt the high-quality strategy. Through the innovations in production and marketing, they raise profitability effectively. Major companies have set foot in the capital market to provide financial support for the future development.

For TV drama production, Huayi Brothers employs the studio model, which runs flexibly. It can not only rapidly expand the production scale, but also enhance the TV drama quality. For marketing, Huayi adheres to the target marketing strategy, and actively explores overseas markets to seek new profit drivers.

In production, Huace introduces the creation model centering scripts and open production model to ensure view and enjoyment as well as market adaptability. As far as the marketing is concerned, Huace distributes its TV dramas by terrestrial and satellite TV stations, exclusive models, buyout models, pre-order models and customized models.

Hai Run will build film & TV bases in Beijing, Shanghai and Qingdao, and it will establish a performing arts training school to extend into the upstream industry chain for raising profitability. Moreover, it is also actively preparing for IPO in Hong Kong.

As for the TV broadcasting, TV stations are still the main broadcasting channels for TV dramas in China, with over 90% market share. Provincial TV stations have surpassed CCTV to become the most powerful TV drama buyers. Video websites and other new media have lower market share, but they develop quickly and have entered the oligopolistic competition stage. In 2010 and 2011, Youku, Tudou and Sohu TV ranked the top 3 by market share. Some video websites have begun to tap into TV drama production, extending towards the upstream industrial chain.

Restricted by China's various policies, the introduced foreign TV dramas have seen decline as a whole. However, some types of overseas TV dramas have witnessed fast growth. In 2011, Thailand dramas became popular in China quickly with high performance-price ratio, exceeding South Korean dramas to take the second place following Hong Kong dramas.

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