



传媒蓝皮书

BLUE BOOK OF CHINA'S MEDIA

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中国传媒产业 发展报告 (2021)

REPORT ON DEVELOPMENT OF
CHINA'S MEDIA INDUSTRY (2021)

主 编 / 崔保国 徐立军 丁 迈

执行主编 / 杭 敏 徐 佳



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Abstract: In the first 20 years of the 21st century, great changes have taken place in the connotation and extension of the media. The boundary of the media is becoming more and more blurred. We need some new expressions, new systems and new thinking to understand the media. In 2020, the gross value of China’s media industry reach 2522.97 billion yuan, with a growth rate of 6.51%. Under the influence of the overall environment, the income of traditional media such as newspapers, periodicals and books declined, but the income of the online field increased rapidly. Popular areas such as online video, online education, and e-sports games are favored by capital. The rise of digital economy, the change of world pattern and the change of global communication pattern have a profound impact on the development of media industry.

Keywords: Media Industry; Digital Economy; Anti-Monopoly

II Media Industry Insight

B.2 China Media Convergence Innovation and Development

Report 2020

Xu Lijun / 019

Abstract: Since 2020, media convergence in China has come into a more crucial stage of in-depth development. Coupled with the impact of COVID - 19, the clock is ticking for traditional media. Based on the memorabilia of domestic media convergence since 2020, this report analyzes new challenges brought by the pandemic, new media development in the main battlefield of the Internet, as well as the media's promotion of market-oriented reform, participation in social governance, and innovation in media management, so as to observe the main thread of media convergence during the year of pandemic.

Keywords: Media Convergence; Marketization; Social Governance; Media Management

B.3 Top 10 Trends in China's Media Development 2021

Ding Mai / 030

Abstract: With the evolvement of media integration, constant changes in terms of contents, distribution channels, devices, users and marketing measures, are taking place in the media market, and the media industry will have to cope with many challenges and reforms. This paper, in regard of the changes in the media market, presents a variety of predictions from different points of views, covering several topics ranging from reform of broadcasting institutions, diversification of mainstream values, content trends, marketing innovations, the development of broadcasting technologies, internationalization of content production to innovation of audience measurement methods. The paper is



expected to provide helpful references to the media industry.

Keywords: Media Market; Media Integration; Online Video Consumption; Marketing Upgrade

B . 4 Transformation Path of Mainstream Media in Media

Convergence Practice

Yu Guoming / 041

Abstract: The emergence of internet platform has brought revolution to communication ecology. Mainstream media and internet platform differ in nature, characteristics, value logic and appeals. The gap and difficulty are obvious if mainstream media sees internet platform as the goal of convergence and transformation. In this regard, this report proposes a transformational strategy for mainstream media, pointing out that only collaboration and symbiosis between platform and new mainstream media can create greater value.

Keywords: Media Convergence; Mainstream Media ; Internet Platform; Value Dividend

III Media Industry and Market Reports

B . 5 China's TV Industry Report 2020

Zheng Weidong / 048

Abstract: 2020 is an extraordinary year. This year is not only a difficult year due to the epidemic situation, but also a key year for the transformation and innovation of TV industry. This paper attempts to analyze the TV consumption and advertising management under the epidemic situation, focusing on the hot spots and industrial trends of long and short videos, live stream selling and copyright marketing, concentrating more on the TV industry innovation in terms of content, users and marketing, etc. This paper also discusses the new problems and opportunities faced by the TV industry in the process of media deep integration

from multiple perspectives.

Keywords: Epidemic Situation and Audience Viewing; Long/Short Video Development; Live Stream selling, Copyright Marketing; New TV Industry

B.6 China's Film Industry Report 2020 *Yin Hong, Sun Yanbin / 056*

Abstract: The film market affected by the Covid -19 around the world. In 2020, Chinese film market took the lead in recovering. The government launched a series of policies, the capital market becomes more rational, film enterprises accelerate the integration, the market is concentrating, and the market structure is regulating deeply. Film genres maintain wide variety and strong films getting more market share. When the box-office remain stable in the future, it is urgent to stabilize the quality of movies, enrich and enhance the competitiveness of products, strengthen the theatricality of art movies, and improve the film industry system.

Keywords: China's Film; Film Industry; Film Market; Film Recovery

B.7 China's Press and Publication Industry Report 2020

Wei Yushan / 066

Abstract: In 2020, due to the impact of the Covid -19 epidemic, the development of the book, newspaper and magazine publishing industry is hovering at a low level. Book retailing market has seen its first negative growth in nearly 20 years, and the newspaper market continues to shrink. During the epidemic, the advantages of digital publishing have been highlighted, and the enthusiasm of press and publishing units to devote themselves to the production of digital publishing products has increased. The coherence of production and demand has provided impetus for the development of digital publishing.

Keywords: Book Publishing; Newspapers; Periodicals; Media Convergence



B.8 Prospect of New Media Communication During COVID-19 Epidemic in China

Peng Lan / 076

Abstract: For the new media in China in 2020, epidemic is no doubt the most important key word. When disconnection happened in some social circumstances, many organizations and individuals made great efforts in connection with the help of new media. Under the special situation, in-depth report was recovering to meet people's need for truth cognition. The mobile video platforms rising in recent years played important roles in public information distribution, as well as people's life and work. All kinds of power in we-media, professional or unprofessional, influenced the information ecology of new media. In the epidemic period, the ordinary new media users played the role of public information dissemination media, and lived a mediated life at the same time. There was also an infodemic with the eruption of information virus, which should make us rethink the weakness of communication models on social media.

Keywords: Social Media; Mobile Video Platform; We-Media; Infodemic

B.9 WeChat 10 Years: Thinking about Product

Zhang Xiaolong / 088

Abstract: After text and pictures, video has become an important form of information transmission. Video expression should be a main theme in the field of content in the next decade. This paper reviews the birth of WeChat video account, live broadcast and other functions, and makes a brief summary of the development of WeChat in ten years.

Keywords: WeChat; Video Expression; Internet Product; Live Broadcasting

B.10 China's Weibo Development Report 2020*Wang Shu, Li Bo / 097*

Abstract: As the biggest Chinese social media, Weibo has extensive influence due to its huge user group and rich product functions. 2020 Weibo focuses on user habits, classifies and analyzes the content and data of the whole station, and puts forward the characteristics and value of Weibo in four aspects, Also confirms the positive role of Weibo in all fields.

Keywords: Weibo; Social Media; Product Value

B.11 Kuaishou's Approaches to Texts of New Era*He Huafeng / 104*

Abstract: With the advancement of basic Internet technology, there are profound changes in both elements of connection and computing during the video era. The Larger market, video era has the following three basic characteristics: Larger market, faster transactions, and deeper context, which leads to a large-scale C2B (consumer to business) phenomenon. Servitization and non-standardization are also constantly improving. The video era will bring about a new technological-economic paradigm and new business species, and the most typical of the species is e-commerce livestreaming.

Keywords: Video; Livestreaming; New Commercial Species; Kuaishou

B.12 Trends of China's Advertising Market*Zhao Mei, Cao Xueyan / 109*

Abstract: In recent years, the business of advertising market has changed quietly, new advertising marketing methods and new media give more



opportunities to the market, while also making participants anxious and tangled. The complex external economic environment makes advertisers constantly seek for the way of reducing cost and efficiency. The arrival of COVID - 19 makes all things come more quickly. The digital process acceleration, new marketing methods such as, live streaming commerce, short video rapidly popular. Internet brand has been fully developed, various kinds of Internet brands of life service have sprung up, which has become the main force of media advertising market. In the complicated marketing environment, the audience is constantly distracted, the trend of marketing communication decentralization is obvious, and single media strategy is difficult to meet the present needs. So the mode of marketing resonance emerges. Marketing resonance can be divided into propagation resonance, effect resonance, scene resonance and so on. Under the combination of various marketing methods and media communication, marketing resonance has gradually become an important strategy of advertising. Meanwhile, in the era of marketing resonance, advertisers have higher and higher requirements for monitoring and evaluation the real effect of series marketing activities.

Keywords: Digitization; Internet Brands; Mode of Marketing Communication; Marketing Scene; Marketing Resonance

B. 13 Summary of TV Viewing in China 2020

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Abstract: In 2020, the prevention of COVID - 19 pandemic causing social isolation promoted TV media consumption. Daily average viewing minutes in main-land China rose to 132 minutes by 6.4% from what it was in 2019, and the growth of viewing minutes among younger audience is most obvious as time spent by audience aged 4 - 24 increased by 10%, and same figure for audience aged 15 ~ 24 is 18%. Consequent to the pandemic control measures, production and broadcast of entertainment programs declined and that of news programs increased, with the Troika of news, TV drama and entertainments remaining to be the major top three categories of TV programs. TV programs produced and broadcast in

cloud manner and sales promotion via live show became popular among the audience. Topics of pandemic prevention, poverty alleviation and patriotic stories were much eulogized both in TV dramas and entertainment shows.

Keywords: TV Programs; Production and Broadcast in Cloud Manner; Sales Promotion by Live Show

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Keywords: TV Drama Market; Audience; Satellite Channel; Terrestrial Channel

B . 15 China's Online Video Industry Report 2020

Zhou Kui / 135

Abstract: According to latest statistics, by June 2020, the number of China's online video streaming service users has reached 944 million, taking up 95.8% of China's Internet users, among which the users of general video and short video



relatively reached 704 million and 873 million. The pattern of a booming industry has been gradually established and the scale of the market exceeded 600 billion Yuan in 2020.

Keywords: Online Video; Online Variety Show; Online Drama; Online Movie

B.16 China's Short Video Industry Development Report 2020

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Keywords: MCN; KOL; Short Videos

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stations were leading in the local market with direct competitions sustained between the provincial stations and the city stations. Those stations and programs specializing in news report usually had higher ratings in the peak hours in the morning and the evening.

Keywords: 5G Technology; Listening Devices; In-car Listening; Local Stations in the Lead

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Abstract: The Chinese game market growth stable in 2020, part of the market develop rapidly. E-sports industry usher in leap forward, mobile game is still occupying the main share of the market. The head manufacturers began to explore the new development route gradually. Independent R&D and overseas sales model also become mature. All industries break the circle and integrate with each other. The ever-expanding gaming scene and the innovation of media technology become an important development direction in the future.

Keywords: Research and Operation Integrated; Head Effect; Transboundary Fusion; Technology Enabling

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Sun Ping, Ding Ding / 166

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subdivision groups. The development of derivatives market presents the overall trend of innovation and acceleration.

Keywords: Animation Industry; Animation Film; Television Animation; Network Animation Derivatives

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Abstract: Residents' online consumption habits become more common in 2020 due to COVID-19 pandemic. China's online retail sales reach 11.76 trillion RMB. The top e-commerce companies are competing fiercely in sinking to the lower tier markets, brand coordination, shopping subsidies and community-oriented group buying, which shows that the "Big Change" of market structure is about to come. As the policy and market environment is favorable, e-commerce companies gain huge benefits from capital market that the market value of many companies has doubled. Live streaming e-commerce explodes, thus reshaping retail business models and boosting the economic recovery. At the same time, the large-scale appliance of 5G technology brings more opportunities to the new form of commerce.

Keywords: E-commerce; Live Streaming; Community-oriented Group Buying; Platform Monopoly

IV Media Convergence & Innovation Reports

B.21 China Listed Media Companies Performance Report 2020

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Abstract: As of December 31, 2020, the weighted change of the total

market value of the media industry is -0.63% , which is -18.27% compared to the same period in 2019. Although the performance of the media industry is not as good as in 2019, the performance of the media industry in the secondary market has gradually get out of the “gloom” of continuous sharp adjustments since 2016. In the first three quarters of 2020, the total operating income of listed media companies was 326.515 billion yuan, a year-on-year decrease of 6.61% , and the net profit attributable to the parent company was 28.725 billion yuan, a year-on-year decrease of 20.59% . Among them, the operating income and the net profit attributable to the parent company fell more than that The decline in the interim financial report has narrowed. The overall growth momentum of the Internet audio and digital reading industries is good. The performance of companies in the gaming and marketing industries is highly polarized. The overall performance of the publishing, broadcasting and television industries is stable, but loss-making companies have increased. The performance adjustment period of the film and animation industries affected by the epidemic has been prolonged, and the industry has suffered large losses.

Keywords: Media Industry; Listed Companies; Capital Market; Secondary Market

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Guo Quanzhong, Guo Fengjuan / 191

Abstract: In 2020, the capital operation of China's media industry presents the following characteristics: First, public companies especially Internet giants like Tencent and Alibaba are the dominant forces; secondly, the number of financing is cut down year-on-year but the amount of financing increased significantly year-on-year; thirdly, traditional media businesses such as film and television have been hit hard and the Internet business has grown rapidly; what's more, privately-owned film and television public companies have introduced state-owned actual shareholder controllers.



Keywords: Accelerating Internet; Secondary Listing; China Radio and Television Network Stock

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Keywords: 5G; Omnimedia communication; Internet Governance; Media Industry

B.24 Process and Inflection Point of Internet Platform

Anti-monopoly

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Abstract: The anti-monopoly wave of global Internet platform in 2020 ends the relatively free of the Internet, bring it into a new stage of strengthened supervision, and will lead to a multi-coordinated governance process. This historic inflection point is not only a major adjustment and reconstruction of the long-term one-way monopoly of the Internet platform and abuse of digital space power, but also a competition based on their institutional innovation ability among China, the United States and Europe. In 2020, with the global outbreak of COVID -19, the

Internet, as a key infrastructure of society, will be deeply embedded in all levels of human society. That accelerates the process of reshaping the power structure and social development.

Keywords: Platform; Anti-monopoly; Internet Governance; Digital Economy

B. 25 Market Development and Trend of Integrated

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Abstract: Global COVID -19 in 2020, people travel and life style change, the influence of traditional radio to listen to the listening volume shrink, but with the depth of the traditional broadcast and new media, broadcasting station building at all levels of financial media, matrix have been forming, broadcasting and deep ploughing in the field of financial media results to show for many years, especially in the special period, the broadcasting authority increasingly highlighted as a mainstream media, the cloud propagation force, for the next broadcast melting media products laid a solid foundation.

Keywords: Integrated Broadcast Media; Media Transformation; Multi-Channel Network

B. 26 Omni-Channel Conversion Effectiveness of ByteDance

Short Video Platforms 2020

Song Yanyan / 227

Abstract: In recent years, driven by disruptive growth of digitalization, brands have continuously increased their advertising investment on digital media, and required quantifiable measurement on the effectiveness at the same time. By utilizing Ocean Engine platform (including Douyin and Xigua, owned by ByteDance), brands established growth mechanism and extended its



commercialization capability through full linkage from advertising to conversion. The Marketing Technology Team of Ocean Engine has worked closely with Kantar Worldpanel (a CTR Service in China) to evaluate the conversion effectiveness from omni-channel purchase of their short video platforms. The study concluded that the value of Douyin not only resides on large active monthly user base and their stickiness, but also reflects on the impact of buyers, including reaching and converting young buyers, retaining loyal buyers and switching buyers from competitors, as well as upgrading buyers' consumption.

Keywords: Short Video; New Marketing Mode; Value of Platform

B. 27 New Marketing Environment : Media Advertising Market in China 2020

Long Siwei, Huang Shengmin and Chen Sucheng / 234

Abstract: Under the background of new consumption, communication, channel, 2B&2C Internet technology and other factors reshaping marketing, media advertising market in China showed a slight decline in total business volume but better than the global trend by the influence of COVID -19 in 2020. There is a certain category fluctuation in the advertising of brands, some of them pay more attention to “ integration of communication and marketing ” when they set marketing goals. In terms of the operation of media platform, Internet advertising revenue is the highest, among which the effect advertising business grows significantly. Meanwhile, the performance of intelligent terminal devices is worthy of attention because of its scene value, and almost all kinds of media advertising services show the characteristics of integration and productization. Marketing agencies are speeding up their adjustment to adapt to the changes in the environment; transformation of traditional agents has been accelerated, at the same time new agencies continue to emerge, which of them use integration & digital tools and services to meet the needs of the market.

Keywords: New Marketing Environment; Integration of Communication and Marketing; Advertising Production; Digital Marketing Tools; Scene Value

B. 28 Trends of Digital Marketing Communication Ecology

in China 2020 –2021

Du Guoqing, Chen Yi / 241

Abstract: The COVID – 19 epidemic situation has accelerated the digital transformation of advertisers, and the media and platforms have entered the stage of upgrading data and algorithms after the digital transformation of transmission network. The overlap of media and platform in content niche leads to the win-win attempt of joint innovation. The digital transformation of marketing communication support organizations has made steady progress, taking advantage of data algorithm and strengthening professional value. The new adjustment of digital marketing has also brought new opportunities and development space for marketing communication support organizations.

Keywords: Digital marketing communication; Advertising ecology; Advertisers

B. 29 Analysis on IPTV and OTT Audience Viewing Trends 2020

Liu Jieting / 248

Abstract: In 2020, COVID – 19 pandemic drastically changed Chinese people's way of life, and TV audiences' viewing behaviors were no exception. Innovated news and entertainment programs actively aimed to meet audiences' viewing needs during this special period on different platforms including live TV, IPTVs and OTTs (i. e: Smart TVs and OTT boxes) . Under special pandemic prevention and control protocols, audiences stayed at home longer which brought more younger viewers back to the TV screen, prompted IPTVs and OTTs to



become a more balanced and family-oriented media platforms.

Keywords: TV; IPTV; OTT

B.30 Report on the Media Convergence Communication Effect of Radio and Television Agency 2020

Liu Muyuan, Xiao Zinan / 257

Abstract: The outbreak of COVID – 19 makes 2020 become unexpected, which is not only a test but also a chance for traditional media. The constraint of coronavirus for the production of traditional media made the live stream and home economy an instant hit. With a series of changing, however, the traditional media transferred to the new racing track, providing targeted service and news with authority, accuracy and integrity. Besides, they propagated the main theme report, transferred crisis to the opportunity and thus became reborn on the new media platform. Basing on the previous situation, CTR media convergence communication effect evaluation system monitored 38 state media consistently in 2020, focusing on the communication result of six channels of new media products of these state media. According to the data analysis, each one was exploring the new way of media convergence with its own characteristics.

Keywords: Media Convergence; Media Convergence Effect; Network Communication

B.31 Research on News Media Convergence Index of Provincial TV Station 2020

Wang Lei, Cui Xiaonan / 264

Abstract: In 2020, the transformation of radio and television media convergence has entered into a further stage. Affected by the COVID – 19, the transmission mode and content expression of provincial TV stations have been

further improved. As an important part of the integrated development of media, provincial TV stations have accelerated construction of media convergence last year, making many efforts to create new mainstream media and increase the mainstream influence. Based on the data of CSM media research News Media Convergence Index, this paper focuses on the actions and achievements of provincial TV stations in news convergence communication and public opinion guidance in 2020, and tries to analyze the development characteristics of current and future TV media news integration and communication.

Keywords: News Media Convergence; Provincial TV Stations; Internet Communication

B.32 Report on Chinese Local TV Organizations' Short Form

Video News Communication 2020 *Wang Li, Mei Jie / 269*

Abstract: With the continuous and rapid development of media convergence, Chinese local radio and television organizations continue to deepen their transformation and upgrading, and show main features such as: there are obvious differentiation characteristics of contents generation and dissemination among inter-agencies; the matthew effect is significant, while accounts that name after TV columns and inner convergence media organizations construct the communication ecology together; News and Short form video aggregation platforms are mainly function on contents, distribution and communication separately.

Keywords: Local TV Organization; Short Form Video News; Third-Party Distribution Platform



B.33 China's IP industry Report 2020

Huang Xinyuan, Yang Xinyue / 276

Abstract: The entire intellectual property (IP) industry chain can be sorted into the upstream market that is mainly engaged in copyright reserve transactions, the midstream market that monetizes a variety of film and television content, and the downstream market that focuses on derivatives, and these three markets are all growing. In the future, with cross-platform attribution, the generalization of IP will continue in production and applications, and IP will be significant throughout the cultural industry and even other industries, and relevant to important means of monetization in the consumer market.

Keywords: IP Industry; Mystery Boxes; Short Video; IP Relaziation

B.34 Application of Blockchain Technology in the Copyright

Field of Audiovisual Media in China *Yan Bo, Wang Yuqi / 281*

Abstract: With the development of media convergence, on one hand, audiovisual media have welcomed the newest market and the best chance for business development; on the other hand, piracy in the environment of the internet is still crucial and hindering the sustainable development of the copyright industry. The utility of the newest technology, typically blockchain, has given the audiovisual industry a new opportunity for strengthening the copyright protection and expanding the market. How to grasp the chance to use blockchain in a good way is one of the most significant task for the future of the audiovisual media in China.

Keywords: Audiovisual Media; Media Convergence; Copyright Protection; Copyright Trading; Blockchain

B . 35 China's Online Education Market Report 2020 *Feng Jin / 286*

Abstract: Since the beginning of the Internet, the education industry has begun its Internet exploration, which evolves with the development of Internet technology. Nowadays's online education can not only reduce learning costs and operating costs based on technical methods, but also solve communication difficulties and enhance learning effects. As a result, the penetration rate of online education continues to increase. During the epidemic, online education, which is free from restriction by time and space, made it possible to “suspend classes without stopping learning” . More people recognized this form of education according to its performance in the quarantine time. In the future, online education will inevitably continue to develop. Under the guidance of national policies, it will deepen the exploration of the integrated development model of online and offline education to empower teaching outcome.

Keywords: Online Education; Distance Education; Education Informatization; Education OMO

B . 36 Innovation Case Studies on MCNs of the Mainstream

Media 2020

Wan Qiang, An Baodan / 294

Abstract: Since the first radio-and-television-owned MCN in China was founded in 2018, more than 20 radio-and-television institutions across the country has established their own MCN, showing that the process of mainstream media MCN expansion is speeding up. Earlier MCNs such as MANGO MCN have their industrial chain completed and have stepped in the stage of brand upgrading, while recent ones are integrating multiple resources on the purpose of a rapid development. For instance, the Radio and Television Bureau of Zhejiang established “Bulu Culture” MCN by combining the strength of internal and external resources; the Radio and Television Bureau of Heilongjiang adopted the



strategy of convergence to design the future layout; the “Lightening” MCN from the Radio and Television Bureau of Shandong has succeeded in balancing social and economic benefits; Chongqing Media MCN has put effort in film and television production and created a new business model based on content production and operation. In Practice, radio-and-television-owned MCNs has been exploring diversified business models, some of which have earned remarkable profits, showing the mainstream media the possibility of reconstructing their business ecology.

Keywords: Mainstream Media; MCN; Innovation

B . 37 Global Digital Economy Report 2020

Liu Jinhe, Yao Gengjun / 301

Abstract: The digital economy become an important force for countries to fight Covid -19 epidemic in 2020 , and will play a key role in the global economic recovery in the post epidemic era. China’s digital economy is in reverse, with all indicators heading for better. The understanding of digital economy has gradually changed from broad digital economy to core industry of digital economy and the method of calculating and statistics is further improved.

Keywords: Digital Economy; ICT; Calculation Method; Platform Economy

V Global Media Market Reports

B . 38 Global Media Industry Report 2020

Hang Min, Zhang Yichen / 307

Abstract: Global media industry has undergone significant structural changes as the COVID -19 pandemic and associated economic downturn spread worldwide

in 2020, which revolutionized digital technology transformations and radically changed consumer behaviors. The industry shows an overall trend of synchronized fluctuations with the global economy, and also epitomizes the ‘Matthew effect’, which has further exacerbated the disproportioned development in sub-sectors. New forms of businesses in the industry are maturing with the evolution of emerging technologies, such as Artificial Intelligence, Extended Reality, and big data, which has necessitated the development of digitalized and intelligentized media ecosystem. The acceleration of paid content, data services, and digitalization are becoming new factors driving the global media and entertainment market reconfiguration. The deep integration of media, culture, and technology will continuously reshape the future of the industry.

Keywords: Media Industry; Media Ecology; Smart Technology; Digitalization

B.39 Media Industry in United States 2020

Shi Anbin, Wang Peinan / 323

Abstract: The U. S. media industry in 2020 could be characterized by market fragmentation and ecological reshaping under the impact of the COVID – 19 pandemic and the U. S. presidential election. Traditional newspapers and cable networks have been hit by COVID – 19 pandemic with a sharp decline in advertising revenue, exacerbating the crisis of small media. Home quarantine and telecommuting lead to the development of online meetings and audio-based social platform. The pandemic forced the closure of U. S. movie theaters, hitting the traditional movie industry but becoming an opportunity for the rapid development of streaming entertainment; Emerging communication technologies including 5G and Blockchain have started to find suitable commercial scenarios after their rapid expansion in the early stage. Based on typical cases and industry data in 2020, this article focuses on the newspaper and TV industry, Internet and social media, film and streaming entertainment, advertising industry, and emerging media industries,



to analyze and forecast the development trend of the U. S. media industry.

Keywords: U. S. ; Media Industry; COVID - 19 Pandemic; Digital Media; Media Convergence

B . 40 Media Industry in European Union 2020

Zhang Li, Wang Yuhuan / 334

Abstract: In 2020, Brexit and the sudden spread of Covid - 19 epidemic caused a great impact on the media industry in the EU. The circulation and the number of readers of the newspaper industry continue to decrease, and the newspaper industry is still facing a difficult transformation. Television and radio are important sources of information for the people of the European Union. More and more viewers and listeners choose to receive TV and radio programs through the Internet. The cinema closures are a devastating experience for the industry, which is still being squeezed by American films and streaming. As the digital music industry continues to develop, physical music is facing difficulties. The Internet and mobile Internet industries are developing strongly. Home working and online classes increase the demand for the Internet, and social media is widely welcomed in the mobile Internet industry. To further regulate the business of large American Internet companies in Europe, the European Union has introduced a series of digital regulations to promote fair competition.

Keywords: EU Media Industry; Media Trust; Streaming Media; Digital Regulation

B . 41 Media Industry in UK 2020

Xu Jia / 344

Abstract: Digitisation, de-localisation and the return of traditional journalistic values featured UK's media industry during the first year of Covid - 19.

National internet infrastructure further improved both in terms of speed and penetration rate. In all sections of the media industry, contents and services further transferred from offline to online and business models were now apparently online oriented. A prominent outcome of digitisation was British media being further de-localised. Social media and instant messaging products of global names took over the whole British market. Global or foreign audio-video platforms seized over half of British audience attention. The unbalanced international communication structure was taking a new shape but among developed countries. Covid -19 on the other hand, awakened the British value towards traditional media as sources of trustworthy information, giving institutional media, in particular public broadcasting services, new vitality for development, although this might only be momentary.

Keywords: UK Media Industry; Digitisation; De-localisation; Return of Traditional News Values

B . 42 Media Industry in Germany 2020 *Wu Jingwei, Xie Kaifan / 353*

Abstract: The German media industry has presented a stable but changing ecological landscape under the influence of multiple factors such as the epidemic, politics and the economy. During the COVID -19 pandemic, social isolation has become a New Normal in Europe, public's demand for entertainment and information has continued to increase, bringing revolution in media contents, value-added production capacity, the enhanced use of new media technologies, and the flourishing of online digital content. Meanwhile, the traditional industry, including the paper media, is experiencing an unprecedented impact. In this report, the development of the media industry in Germany in 2020 will be discussed from the perspective of media ecology in relation to specific media forms.

Keywords: Germany Media Industry; Media Ecology; Digital Content



B . 43 Media Industry in France 2020

Zhang Wei / 359

Abstract: Under the influence of the “Mouvement des gilets jaunes yellow vest”, the overall growth of French economy slowed down in 2019. The French media industry has been affected in this economic and social environment. Traditional industries such as press and publishing, broadcasting and film shows a downward trend, while the Internet industry maintains an upward trend.

Keywords: Culture and Media Industry; Cultural Economy; Digitalization

B . 44 Media Industry in Japan 2020

Lin Yang / 364

Abstract: Driven by the growth of domestic demand in Japan, the development of certain industries in the Japanese media market in 2019 saw a promising momentum; movie box office revenue hit a new high in the past ten years, the advertising market has risen for eight years consecutively, the volume of Internet advertising exceeded TV for the first time and the electronic publishing market promoted the publishing market's overall growth. Despite the prosperous digital economy, the market size of traditional media industries, like newspapers, radio, television, recording fields, is still declining slightly. With the further popularization of mobile Internet, the management problems faced by the traditional media will become more and more obvious.

Keywords: Japanese Media Industry; Japanese Media; Japanese Advertising Market

B . 45 Report on Overseas Development of Chinese Media

Agencies 2020

Li Dongxiao, Zhou Changcheng / 371

Abstract: Based on the stable growth at home, China's media agencies are

aggressively developing the overseas market. At present, there are still huge opportunities among international users. With the continuation of COVID – 19, the “home economy” has become a strong driving force for economic development. Users’ demand for social media and online entertainment is strong, which creates favorable conditions for the media to go abroad. This report will focus on the 5 core media sectors, i. e. news media, publishing, film and music, social media, and game industry to investigate the status of overseas development of representative Chinese media agencies, and summarize the trend and challenges of the overseas communication.

Keywords: Chinese Media Agencies; Overseas Development; News Agencies; Social Media

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BLUE BOOK OF
CHINA'S MEDIA

“传媒蓝皮书”连续出版十七年，以全球视野紧密跟踪传媒发展前沿，用扎实数据系统研究中国传媒产业发展。本研究报告对中国传媒产业发展现状与全球传媒发展趋势进行了深入分析，解读传媒年度热点，剖析网络新技术引领下的商业模式创新和传媒投资趋势。报告汲取世界各国传媒产业发展经验，为中国传媒产业正在发生的变革提供前瞻性参考观点。

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