China TV Shopping Industry Report, 2016

Description: Chinese TV shopping began in the 1990s, and it has gone through a start-up stage, a golden development stage, a low tide stage, a transformation stage, a multimedia integration stage and so on. With the development of the Internet and other new media technologies, Chinese TV shopping market has stepped in the multimedia integration phase and been developing radically. The market size jumped from RMB6.73 billion in 2007 to RMB39.93 billion in 2015, at a CAGR of 24.9%.

China's TV shopping industry scale is still small and only accounts for less than 0.2% of the total retail sales of social consumer goods, much lower than over 8% in Japan, South Korea, the United States and other developed countries but implying huge market potentials. In the wake of the technological advance of mobile phones, tablet computers and other electronic terminals, the rapid emergence of mobile social media as well as wide application of big data and cloud computing, TV shopping will develop quickly with computers and mobile terminals to form three-screen interaction. By 2020, Chinese TV shopping market will value RMB80 billion, with a CAGR of 14.9% compared with 2015.

Although the overall outlook for the TV shopping industry is promising, different business models bring different effects. The modern home shopping based on professional television shopping channels of TV stations is entertaining and informative, which is quite favored by the audience (consumers), so the relevant enterprises flourish. However, it is difficult for the traditional TV direct sales model to survive. One of the top two traditional giants -- 7-STAR quitted from the field of TV shopping after being acquired in 2015 formally; the other tycoon Acorn International has suffered losses, cut advertising budget and sought transformation over the past few years.

In terms of competition pattern, as of early 2016, the SARFT (State Administration of Press, Publication, Radio, Film and Television of the People's Republic of China) had approved a total of 38 TV shopping companies, of which 11 ones held nationwide licenses and 27 ones had regional licenses. Nationwide license holders are entitled to cover more areas and more people, so they enjoy superiority in market size.

By revenue, Chinese TV shopping competition pattern shows three echelons: The first echelon is led by the overwhelming OCJ whose television channel revenue hit about RMB5 billion in 2015; the second echelon is comprised of national TV shopping channels including Happigo, JYH.com, FS Shopping and Hao24 which garner the television channel revenue of over RMB500 million each, wherein Happigo fetched RMB1.6 billion and FS Shopping gained nearly RMB1.5 billion in 2015; the third echelon embraces other local TV shopping channels whose television channel revenue is RMB500 million or less respectively.

China TV Shopping Industry Report, 2016 mainly studies the followings:

- Overview of TV shopping industry (including definition, classification, industry chain, market characteristics, business models, policies, etc.);
- Influence of macro-economy on China TV shopping industry;
- Overview of Chinese TV shopping market (including development course, market size, competition pattern, market structure, regional analysis, development prospects);
- Analysis (including profile, business performance, revenue structure, R & D spending, TV shopping business, strategies, etc.) on 14 TV shopping companies such as Happigo, Oriental CJ, FS Shopping, Jiajiamall.com, Hao24, JYH.com, CCTV Home Shopping, CNRMALL,QVC, SSGO, EACHOME and Acorn International.

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