

An Analysis of the Demand for Imported Foreign Television Programs in China

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Abstract

An Analysis of the Demand for Imported Foreign Television Programs in China
Keyang Li

The purpose of this study is to analyze the demand for imported foreign television programs in China in the next 5 years. The Chinese TV market is a large market with 360 TV stations that need to import numerous foreign TV programs to serve a variety of audiences. This study was created via survey to discover how regular consumers think and feel about the foreign television programs and utilized field interviewing to determine their attitudes and needs for imported overseas television programs. In addition, online secondary quantitative data was applied to analyze the imported TV programs in China from 2008 – 2011. During the past decade, many international film festivals and television awards ceremonies are held in China, as well as some TV communication panels conducted in Beijing, Shanghai and Guangzhou, China has become the largest television program trading market in Asia. Thus it is important to understand the relevant trading information.

CHAPTER 1: INTRODUCTION

Introduction

In contemporary society, the opportunities for cultural exchange are constantly promoted because of globalization. The trade in television programs has increasingly become an important part of international cultural trade. Historically, the focus of academic research has been oriented on an analysis of American television programs exported to other countries. Since the 1970s, there has existed a so-called one-way influx of American cultural commodities to other countries and a "unilateral relationship", but a lack of analysis about the situations on the import side. (Zhou, 2008)

In fact, the trade of television programs is dominated by both supply and demand factors, however it should be a bilateral relationship; demand is a key factor during the process. This thesis introduces a new perspective, applying the economic theories of demand side behavior to analyze the trend of Chinese importation of foreign television programs and the determinants of the demand. All research and deductions are based on the situation as it relates to the mainland Chinese television market.

Moreover, the imported foreign TV shows in this study refers to the shows which are purchased by Chinese TV stations and have been directly broadcast, excluding cases where foreign copyrighted formats have been purchased and re-made.

Background and Need

Technically, media of the People's Republic of China principally consists of television, newspapers, radio, magazines, motion pictures and Internet. Currently, with emerging technology, social media, new media and “we media” (user generated content, such as YouTube, Twitter and Vine) gain popularity among the young generation and alter people’s viewing habits.

After the Chinese Civil War (1946-1949), mass media in China were established rapidly, beginning with the first national broadcasting network on May 1, 1958; when Beijing Television (changed to China Central Television in 1978) was formally launched. (Xue, 2009)

China Central Television and a large number of provincial and municipal state-run TV stations broadcast five million hours of TV programs annually. In general, they broadcast more than 8,000 dramas a year, however, a quarter of the dramas need to be imported. Foreign documentaries, sci-fi programs, cartoons and children's educational programs, and feature films are favored by the importers of Chinese television stations. (Xue, 2009)

Since China entered the World Trade Organization, inter-media and trans-regional media groups have formed and operate with multiple strategies in China, such as remaking and cooperative film-making with foreign production teams, in order to meet the competition and challenges from powerful overseas media groups. (Xue,

2009)

According to research from The State Administration of Radio, Film and Television (SARFT), there are 360 television stations in China. Large international TV expositions, including the Shanghai Television Festival, Beijing International Television Week, China Radio and Television Exposition and the Sichuan Television Festival are held on a regular basis. China's television market is increasingly open to the world, attracting more and more foreign film and television production companies to do businesses in China. In the meantime, China's television stations are inclined to introduce even more overseas programs to attract viewers, boost ratings, and retain their competitiveness among the global information platforms.

Purpose of the Study

In general, after introducing foreign television programs from production companies, the TV stations' staff would modify the content and form of programs in order to meet the requirements of government censorship and cater to the Chinese viewers' appetite. However, many foreign companies are unaware of these requirements, and the copyright owners often strongly resist this kind of behavior; it seems that they entirely have no idea what kind of programs are suitable to sell to China. (Xinhua, 2011)

There are significant disagreements among producers, distributors and broadcasters.

One of the biggest controversies is whether to modify the content or form of the original show. The producers resist revising or remaking their shows, because they worry that some changes might undermine the integrity of the programs. However, according to the broadcasters, imported programs will be required to translate to Chinese tastes and sensibilities in order to achieve expected ratings. Most Western companies are selling the programs which are impossible to broadcast in China. (Xinhua, 2011)

According to the Sina News, although Fremantle Media, Endemol and the BBC were all very interested in the Chinese market and tried to sell their programs to Chinese TV stations, in the end they did not have success. According to Professor Zhang, an expert from Communication University of China, they failed to sell their shows in China not because their programs are not good enough; it is because they do not know the Chinese TV market and lack experience selling TV shows in China. It is complicated to sell programs in China due to significant government regulation in this industry. (Docin, 2011)

The Chinese TV market is a large market with 360 TV stations that need to import numerous foreign TV programs to serve a variety of audiences. Chinese TV production companies do not lack production capability; their programs are full of local characteristics and originality. However, the local programs are short of creativity. In this situation, purchasing high rated overseas reality shows has become a

major strategy for Chinese television stations to guarantee a larger audience. According to Mr. Zhang, a TV staff member at the Zhejiang Satellite TV Station, “Because we do not have good enough ideas, and innovation is a significant requirement for TV stations to survive and develop in the highly competitive industry. In this case, introducing successful overseas programs is a popular way to have innovative programs and guarantee the ratings with minimal risk”. (Docin, 2011)

In summary, this thesis will fully investigate and research the principles and rules of importing overseas TV programs in China, analyze the international TV trade in recent years, and predict the future trend of commercial transactions in the mainland China TV market.

Statement of the Problem

Problem 1: Domestic programs are being threatened by foreign television programs. Should China cut off the amount of imported foreign television programs?

Problem 2: What are the real determinants of the demand for overseas television programs?

Problem 3: What is the future of imported foreign TV programs in China in the next 5 years?

Research Questions

- A. How much of an increase or decrease of imported foreign television programs has occurred in China over the last 5 years?
- B. What are the factors that determine the demand for importing foreign television programs in China?
- C. What is the future for the importation of foreign TV shows in China in the next 5 years? What are the influencing factors?
- D. What are the most popular imported shows for Chinese viewers and why?

Significance to the Field

The majority of countries and regions outside the U.S. import TV programs from abroad. On average, the quantity accounts for 20%-50% of the total broadcast day and it is similar in the Chinese TV market. Since many international film festivals and television awards ceremonies are held in Shanghai, as well as some TV communication panels conducted in this city, Shanghai has become the largest television program trading market in Asia. Thus it is important to understand the relevant trading information. (Zhou, 2008)

Limitations

According to a report from the Chinese Ministry of Culture, there were approximate 360 TV stations in the country in 2010. This situation makes it difficult to collect data. It may cause bias to interview a limited numbers of selected

representatives and analyze insufficient statistics. It has been 35 years (1979) since the first foreign TV show was imported into China, and it is difficult to determine audiences' attitudes over such a long period without greater demographic study. Moreover, because most TV stations in China are government-oriented, some information is unavailable to the public. Criticism is often less than expected due to the sensitivity to government intervention and regulation.

Since Hong Kong and Macao have separate media regulatory bodies, this thesis will not examine those regions.

CHAPTER 2: LITERATURE REVIEW

In 1979, China Central Television (CCTV) broadcast a drama from Yugoslavia titled “The Written Off Return”. It was the first time that China imported a foreign TV program causing a great impact on the Chinese audience at that time. In 1980, CCTV successively broadcast two U.S. TV series’ “The Man from Atlantis” and “Garrison’s Gorillas”. “The Man from Atlantis” had swept the country. (Hu, 2007)

Subsequently, more and more excellent foreign programs were introduced by major TV stations. The quantity of foreign programs caused a “mania” on mainland China. (Hu, 2007)

The second foreign TV show to create intense interest among Chinese audiences was imported from Japan. In 1983, the Japanese series “Sugata Sanshiro” was broadcast in China, followed by dramas “The Blood Doubts” and “Oshin”, which first aired on CCTV in 1985 and attracted over 100 million viewers. This was the first “Japanese drama boom” in China. In the 1980’s, the China Broadcasting System aired 37 Japanese TV series, including inspirational dramas “Oshin”, “Volleyball Heroic Woman” as well as tragedies “The Blood Doubts”, and “Blood Chains”. (Hu, 2007)

Subsequently, Latin American TV series’ gained in popularity among Chinese audiences. In 1984, BTV (Beijing Television Station) ran a Brazilian TV series “Escrava Isaura” and then introduced the Mexican TV series “Los Ricos También

Lloran” and “Bianca Vidal”. Although each series aired more than 100 episodes and the content was considered tedious, people enjoyed the series at that time because of the extreme shortage of entertainment. (Hu, 2007)

A Hong Kong TV series created the fourth imported TV program mania in 1983. Hong Kong martial arts dramas, such as “Legendary Fok”, and “The Legend of the Condor Heroes” got very high ratings in mainland China, which caused a martial arts culture boom, with many people learning Kung Fu and Cantonese. (Hu, 2007)

In the early 1990s, due to government reform and the policy of openness, cross cultural exchanges had improved. Taiwanese dramas attracted attention and had a significant impact on the young generation. Moreover, American TV series and Singapore TV programs were also popular among teenagers. The 1990s were the best decade for importing overseas programs and many excellent foreign TV series were aired by major television stations, such as *Growing Pains*, *Beauty and the Beast* and *Dallas*. Due to their cultural proximity, Hong Kong, Taiwanese and Korean TV series were the most popular foreign series in mainland China. (Xiao, 2008)

Since foreign TV programs had a large market share, Chinese Regulatory Authorities worried that domestic TV programs would lose share; the Chinese government tried to enact relevant laws and regulations to reduce the amount of imported foreign programs and reverse the programming trade deficit.

According to the State Administration of Radio, Film and Television, under the new rules, “No foreign TV series may be shown during the primetime hours of 7pm to 10pm and overseas-produced shows could take up no more than 25% of total programming time each day. These series should run for no longer than 50 episodes”. (SARFT, 2010)

“The aim is to improve the quality of imported TV programs and to enrich the content of shows available in high definition, so high-definition imported TV shows are preferred”. According to SARFT, “They will make efforts to avoid situations in which domestic channels lean too heavily on programming from one particular country or region. It also said domestic channels would not be allowed to show too much programming from any one country or region, but did not elaborate”.

“The broadcasting time for an imported TV series on a given channel may not surpass one-third of the total amount of time that channel dedicates to broadcasting TV series”, according to a circular released by the State Administration of Radio, Film and Television (SARFT, 2010)

Furthermore, “TV channels may not air unauthorized overseas series in disguised forms, such as through introductions on domestic programs”, the circular said. “Programs that are specifically designed to introduce foreign TV series may not show

more than 3 minutes of a given series”.

The rules also urged all provincial TV administrators to “intensify supervision over all TV channels under their jurisdiction and to increase penalties for content providers who violate regulations”. (Wang, 2012)

According to China Daily, a state-run newspaper, the new rules were intended to create “A favorable environment for TV shows made by companies on the Chinese mainland”. Of the 30 imported shows that were approved in 2011 by mainland regulators, most originated in Hong Kong, Taiwan and South Korea, according to the agency’s web site. “A sad truth is that western programming is almost nonexistent on Chinese television”. (Jacobs, 2012)

South Korean TV Drama in China

Under the influence of the “Korean Wave”, South Korean dramas and K-POP (Korean popular music) shows have increased in popularity since the late 1990s, beginning with the broadcast of several Korean TV series in 1997. The “K-dramas” mania peaked in 2002, with 67 TV series broadcast by major TV stations in China. According to the Asia Times Online, Dae Jang Geum was first aired by China's state-run Hunan Broadcasting System on Sept. 1st 2005 and attracted over 180 million viewers from all over the country. (Tsai, 2005)

Currently, the spread of Korean drama has had a significant impact on teenagers and young adults. Young people began to mimic Korean styles of dress, haircut and mannerisms. With the volume of Korean cultural imports rapidly increasing, China's State Administration of Radio, Film, and Television responded with a decision to restrict and decrease the number of Korean TV dramas shown to Chinese audiences. In addition, the high cost, repeated airings, similar content and more competitive TV series from other countries made "K-dramas" less popular. Consequently, expected Korean TV drama imports will decline in the coming years. (Lara, 2010)

Japanese TV Drama in China

According to the results of public surveys, though Japanese dramas are not as popular as Korean dramas, they are favored by middle-aged audiences. The attraction of Japanese TV series for Chinese viewers is the classical Japanese logic - the nature of the emotion of *natsukashii*, interpreted as "pleasant sorrow," the story of friendship, love and painful regret. They make up for it completely with an artistic approach to filming and writing. As a result, Japanese TV series caused fanaticism in the Chinese TV market. (Zhou, 2008)

China and Japan have several unresolved historical and political issues; it is not easy to import large quantities of Japanese TV dramas. Sino-Japanese relations continue to have a decisive impact on the importation of Japanese programs.

Taiwanese TV Drama in Mainland China

Since Taiwanese dramas are predominately produced in Mandarin, mainland viewers could have a better understanding of the plots. The characters speak mainly in Mandarin, with a special pronunciation in Taiwanese tone. The common language is a great advantage that makes Taiwanese TV series gain increasing popularity in mainland China. Television stations eliminate the need for translation thus saving program costs. This is one reason that TV stations prefer to introduce Taiwanese TV series. (Zhou, 2008)

In addition, Taiwanese series typically describe romance. They have less violence and sexual content than many other soap operas and primetime dramas in Western countries. Thus, Taiwanese series are easily accepted to the reserved Chinese audiences and serve their appetites well. In general, the most popular Taiwanese drama is "idol drama" and primarily caters to teenagers and young adults. (Zhou, 2008)

Hong Kong TV Drama in Mainland China

Hong Kong television dramas are predominately produced in Cantonese. As a result, Hong Kong TV programs dominate the southern TV markets in China, such as Guangdong Province, where Cantonese is the dialect. Hong Kong media have become influential in Guangdong Province since the 1980s. In 1988, the State Administration of Radio, Film, and Television allowed local production companies to produce

Cantonese TV programs and gave permission to television stations to broadcast Cantonese TV shows as a countermeasure against the influence of shows from Hong Kong. (Hu, 2007)

There are several types of Hong Kong television dramas; romantic series, historical themed series and martial arts series. Martial arts drama is the symbol of Hong Kong TV programs. (Hu,2007)

American TV Drama in China

According to Maggie Xiong, who handles international TV-content acquisition and director-media development at Youku's parent company (a video-sharing website in China, similar to YouTube), the number of users who like American shows and watch American shows are both increasing. “American TV shows are the fastest-growing content category of online video. There are several reasons for American shows' growing popularity. First, the production quality tends to be better, and the rising popularity of Hollywood films has led to more interest in American TV content. In addition, American programming has a lot of different types of themes and plots”. (Chang, 2013)

“Since mainland China has strict censorship on TV, it is not easy to introduce the entire season of an American TV series, even an intact episode. For example, when a TV station in mainland China broadcast the popular U.S. drama series ‘Newsroom’,

the concepts of free speech, which are exemplified in the show, are forbidden and need to be cut off because the government tightly controls the press. It seems impossible to watch the full version on TV while internet viewers could find the intact version on video sites. Some video sites, which began as platforms for user-generated content, have started building their library of licensed U.S. TV programs since 2010". For example, Youku has purchased rights to 33 shows so far in 2013, including "The Vampire Diaries," "Modern Family," "Pretty Little Liars," "Revenge" and "2 Broke Girls." According to the company's financial results, Youku spent \$118.3 million on content acquisition in 2012. "Online broadcasts of American shows can be a way to reach a highly desirable demographic that's difficult to target through traditional media". (Chang, 2013)

Overall, the total number of imported foreign programs increased year over year before the government limited the amount in April, 2014. "In the last few years, CCTV to major provincial TV networks were all depending on imported programs to have the market share as much as possible". Foreign programs were lighting up the Chinese screen. "In the future, with the impact of social media on TV, competition among television networks will prompt a rapid growth in Chinese remakes of foreign TV shows. Regardless the owners or creators in the world, China is an expanding market and attracting more and more investors". (Wen, 2013)

CHAPTER 3: METHODOLOGY

Introduction

Since 1990, more and more overseas programs have appeared on Chinese screens, including sitcoms, dramas, reality shows and other types of programs. Since many young people are attracted to the foreign culture through foreign TV programs, some conservative scholars from The Communication University of China cannot help but worry about the domestic TV programming. (Xinhua, 2011)

Do these concerns affect the demand for importing foreign television programs in China, or would they affect the actual number of imported TV programs? Due to globalization, cultural trade has become a very important part of international trade. Thus, under the market mechanism and government regulations, what are the real determinants of the demand for overseas television programs? And what is the trend of importing foreign TV programs in China in the next 5 years?

This study was created via survey to discover how regular consumers think and feel about the foreign television programs and utilized field interviewing to determine their attitudes and needs for imported overseas television programs. The online questionnaire was designed in a way that would show the preference of different types of programs. In addition, in order to garner a more logical and accurate result, online secondary quantitative data was applied to analyze the imported TV programs in China from 2008 – 2011 and the program genres were narrowed to drama and

animation, the two most popular genres for importation.

An email questionnaire was utilized to collect information from TV station staff, economists and SARFT officers to make conclusions about the demand for imported television programs, and to predict demand in the coming years.

Setting

In order to enable people who had access to the internet to participate in the survey, the survey was conducted in mainland China through Wen Juan Xing (<http://www.sojump.com>) which is a professional online survey, assessment and voting website. Most users are from academic schools and business corporations. People using the site could do this survey at the front page as well as similar and related surveys would be recommended to the participants.

The quantitative data were retrieved from the State Administration of Radio, Film, and Television (SARFT) official website, including statistics on imported TV programs in China from 2008 to 2011.

Sample

For the purpose of making conclusions based on the survey, random sampling was applied to ensure that the results are representative of the target population. Most people who took part in this survey were 20 to 30 years old who are heavy internet

users, and those who show an interest in foreign TV programs. People who participated were from a wide age range and diverse cultural backgrounds in Mainland China and there were no limitations to the demographic characteristics. However, people from the Southern China were more likely to participate in the survey, because they live in coastal cities, potentially increasing their interest in foreign cultures.

A total of 161 individuals took part in the survey. Among them, 60 were male and 101 were female. Their age was divided into five quintiles, 20 people (12.5%) were under 20 years old and 61 people (37.5%) were from age 21-25, 40 (25%) were from age 26-30, 20 (12.5%) from 31-40, 20 (12.5%) from 41-50.

The total amount and trend of importing foreign TV programs

1. Analysis of the total amount of imports in China from 2008 – 2011
2. Analysis of the trend of importing foreign TV programs in the next 5 years

Chart 1. Statistics on Imported TV Programs in China in 2008

| Statistics on Imported and Exported TV Programs (2008) | | | | | | | | |
|--|-------------------|--------|------------------|------------------|-------|---------------|--------|-------|
| Item | National Total | Europe | United States | Latin America | Japan | Korea Rep. | Africa | Other |
| Value of Imported TV Programs (\$10,000 USD) | 6489 | 1022 | 1004 | 78 | 511 | 1138 | — | 2735 |
| TV drama (\$10,000 USD) | 3470 | 65 | 21 | 46 | 414 | 1082 | — | 1843 |
| Cartoon (\$10,000 USD) | 125 | 58 | 48 | — | 6 | — | — | 14 |
| Time of Imported TV Programs (hour) | 20550 | 6551 | 7463 | 165 | 582 | 2869 | — | 2920 |
| TV Drama (Season) | 122 | 3 | 10 | 2 | 18 | 34 | — | 55 |
| TV Drama (Episode) | 3594 | 54 | 20 | 67 | 407 | 1439 | — | 1607 |
| Cartoon (Season) | 13 | 4 | 3 | — | 5 | — | — | 1 |
| Cartoon (Episode) | 734 | 233 | 207 | — | 254 | — | — | 40 |

Retrieved Oct. 2013 from SARFT

Chart 2. Statistics on Imported TV Programs in China in 2009

| Statistics on Imported and Exported TV Programs (2009) | | | | | | | | |
|--|-------------------|--------|------------------|------------------|-------|---------------|--------|-------|
| Item | National Total | Europe | United States | Latin America | Japan | Korea Rep. | Africa | Other |
| Value of Imported TV Programs (\$10,000 USD) | 7227 | 1058 | 1786 | 93 | 230 | 1042 | — | 3018 |
| TV drama (\$10,000 USD) | 3954 | 333 | — | 82 | 173 | 987 | — | 2378 |
| Cartoon (\$10,000 USD) | 19 | 5 | 11 | — | 3 | — | — | — |
| Time of Imported TV Programs (hour) | 21426 | 8661 | 8697 | 144 | 233 | 1328 | — | 2363 |
| TV Drama (Season) | 115 | 8 | — | 1 | 11 | 32 | — | 63 |
| TV Drama (Episode) | 4035 | 371 | — | 120 | 187 | 1614 | — | 1743 |
| Cartoon (Season) | 5 | 1 | 3 | — | 1 | — | — | — |
| Cartoon (Episode) | 421 | 209 | 160 | — | 52 | — | — | — |

Retrieved Oct. 2013 from SARFT

Chart 3. Statistics on Imported TV Programs in China in 2010

| Statistics on Imported and Exported TV Programs (2010) | | | | | | | | |
|--|-------------------|--------|------------------|------------------|-------|---------------|--------|-------|
| Item | National Total | Europe | United States | Latin America | Japan | Korea Rep. | Africa | Other |
| Value of Imported TV Programs(\$10 000 USD) | 6425 | 737 | 2029 | 2 | 123 | 335 | 3 | 3197 |
| TV Play | 3201 | 96 | 82 | — | 47 | 312 | — | 2663 |
| Cartoon | 37 | 16 | 20 | — | 0 | — | — | — |
| Time of Imported TV Programs(hour) | 22197 | 9363 | 8526 | 4 | 350 | 1285 | 3 | 2666 |
| TV Play (set) | 156 | 8 | 10 | — | 3 | 26 | — | 109 |
| TV Play (part) | 4482 | 46 | 137 | — | 34 | 1499 | — | 2766 |
| Cartoon (set) | 8 | 2 | 5 | — | 1 | — | — | — |
| Cartoon (part) | 785 | 130 | 555 | — | 100 | — | — | — |
| Value of Exported TV Programs(\$10 000 USD) | 3136 | 340 | 171 | 23 | 106 | 140 | 7 | 2348 |
| TV Play | 1117 | 11 | 103 | 23 | 101 | 61 | 5 | 813 |
| Cartoon | 1662 | 328 | 55 | — | — | 41 | 1 | 1237 |
| Time of Exported TV Programs(hour) | 13762 | 505 | 3032 | 69 | 192 | 668 | 113 | 9183 |
| TV Play (set) | 288 | 8 | 89 | 2 | 4 | 13 | 2 | 170 |
| TV Play (part) | 12362 | 338 | 2838 | 82 | 134 | 521 | 81 | 8368 |
| Cartoon (set) | 84 | 25 | 8 | — | — | 3 | 1 | 47 |
| Cartoon (part) | 4930 | 431 | 502 | — | — | 130 | 26 | 3841 |

Retrieved Oct. 2013 from SARFT

Chart 4. Statistics on Imported TV Programs in China in 2011 (Asia)

| Statistics on Imported and Exported TV Programs (2011) | | | | | | |
|--|----------|--------|-------------------|----------------|------------------|---------------|
| Item | Asia | Japan | Republic of Korea | Southeast Asia | Hong Kong, China | Taiwan, China |
| | | | | | | |
| TV Play | 3463 | 88 | 1460 | 2242 | 898 | 409 |
| Cartoon | 8 | 8 | | | | |
| Documentary | 96 | 5 | 1 | | 85 | 5 |
| Time of Imported TV Programs (hour) | 2055 | 86 | 583 | 1133 | 914 | 362 |
| TV Play (set) | 58/1927 | 1/23 | 24/767 | 40/1063 | 33/875 | 12/330 |
| Cartoon (hour) | 8 | 8 | | | | |
| Documentary (hour) | 182 | 22 | 4 | | 154 | 1 |
| Value of Exported TV Programs (\$10 000 USD) | 1237 | 160 | 267 | 524 | 481 | 369 |
| TV Play | 934 | 145 | 70 | 339 | 308 | 318 |
| Cartoon | 116 | 12 | 192 | 79 | 116 | 34 |
| Documentary | 131 | 2 | 5 | 86 | 23 | 17 |
| Time of Exported TV Programs (hour) | 11106 | 625 | 1039 | 5217 | 2775 | 357 |
| TV Play (set) | 152/8381 | 17/573 | 17/682 | 78/4851 | 28/1561 | 39/1750 |
| Cartoon (hour) | 261 | 1 | 26 | 260 | 109 | 27 |
| Documentary (hour) | 40 | 31 | 33 | | 5 | 37 |

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Chart 5. Statistics on Imported TV Programs in China in 2011 (Non - Asia)

| Statistics on Imported and Exported TV Programs (2011) | | | | | | |
|--|-----------|--------|---------|---------|---------------|---------|
| Item | Total | Europe | Africa | America | United States | Oceania |
| | | | | | | |
| TV Play | 5317 | 10 | | 78 | 159 | 6 |
| Cartoon | 108 | 25 | | 76 | 62 | |
| Documentary | 567 | 306 | | 160 | 156 | 5 |
| Time of Imported TV Programs (hour) | 21790 | 8224 | 9 | 1122 | 6905 | 66 |
| TV Play (set) | 146/3423 | 4/8 | | 30/30 | 31/50 | 1/2 |
| Cartoon (hour) | 279 | 65 | | 205 | 165 | |
| Documentary (hour) | 955 | 502 | | 257 | 249 | 8 |
| Value of Exported TV Programs (\$10 000 USD) | 3487 | 87 | 39 | 1421 | 1425 | 2 |
| TV Play | 2254 | 6 | 23 | 993 | 1000 | 2 |
| Cartoon | 563 | 56 | 10 | 64 | 59 | |
| Documentary | 282 | 13 | 6 | 130 | 130 | |
| Time of Exported TV Programs (hour) | 25657 | 888 | 1294 | 6949 | 8455 | 52 |
| TV Play (set) | 298/14001 | 3/130 | 26/1034 | 87/3337 | 87/3396 | 2/67 |
| Cartoon (hour) | 426 | 79 | 3 | 155 | 103 | |
| Documentary (hour) | 111 | 38 | 33 | | | |

Retrieved Oct. 2013 from SARFT

According to the charts above, American TV programs, South Korean TV programs and programs from Hong Kong have distinct advantages in the Chinese market. In

addition, research in the China TV Guide (a weekly Chinese newspaper that provides television programming and television-related news) shows the total export value of American movies and TV shows were \$ 14.3 billion in 2011. These programs were sold to more than 100 countries and especially popular in the European market. As to British TV programs, exports were approximately \$ 2.035 billion in 2012 with the main markets being the United States, Australia, and Scandinavia. (Dalian Daily, 2014)

The exportation of Korean popular culture has increased in recent years. It has mainly focused on Asian markets but also has broad coverage in the Americas, Europe, and 33 other countries and regions. Korean drama had significant growth in the new millennium. In 2001, the value of exported Korean drama was \$8 million; however, by 2011 Korean drama gained in popularity and the total revenue reached \$158 million. In 2011, Japan generated approximately \$62 million from exporting TV programs, according to data from Japan's Ministry of Internal Affairs. Japan had been ranked second to the US on program exports. However, current data shows Japan's position has gradually being overtaken by South Korea and Europe. (Dalian Daily, 2014)

Measurement Instrument

A consensus-generating instrument was used to collect data. A questionnaire on how people think and feel about foreign television programs was sent out to get

feedback from the viewer's perspective in order to draw conclusions and make recommendations. Eighteen questions were asked in the survey based on the audiences' personal information, program preferences and their viewing habits on foreign programs' content, genre, time period, and casting. Results were shown both qualitatively and quantitatively.

Validity and Reliability

In order to check the validity and reliability of the questionnaire, a small group of people were arranged to pretest the survey before it sending to the public. The survey was answered by the same group of people repeatedly under the same conditions and the results showed consistently. Based on the feedback from the pretest, the survey was approved because it measured all of the designed aspects, and is appropriate and sound. Due to the survey being conducted via the Internet, the results may have a bias against those without internet access.

Data Collection Procedure and Data Analysis

According to CSM (CVSC Sofres Media) research, the most popular foreign programs' genres are drama and children's educational programs, including cartoons. Mainland Chinese audiences have a preference for TV series from Hong Kong, Taiwan, Japan and South Korea in view of their cultural proximity. (Straubhaar, 1991)

The questionnaire was sent out at random after pretest through the website. The

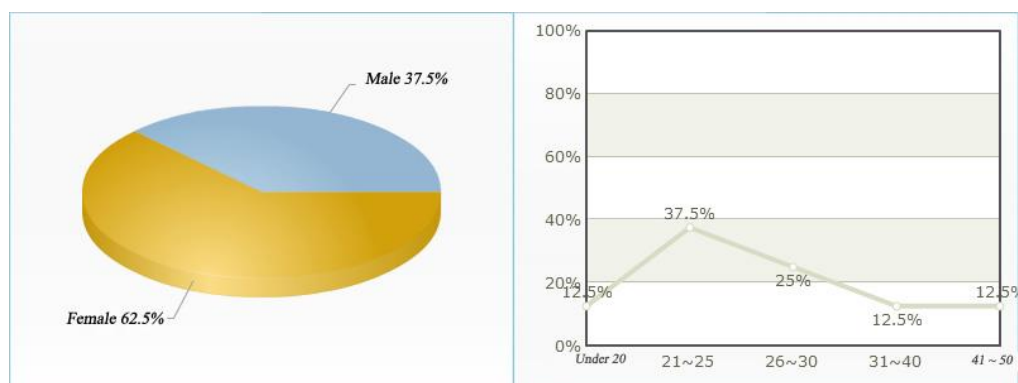
data-collection period lasted 6 weeks. The results were presented in numbers, percentage and graphs.

CHAPTER 4: RESULTS

Results

Question 1 Gender

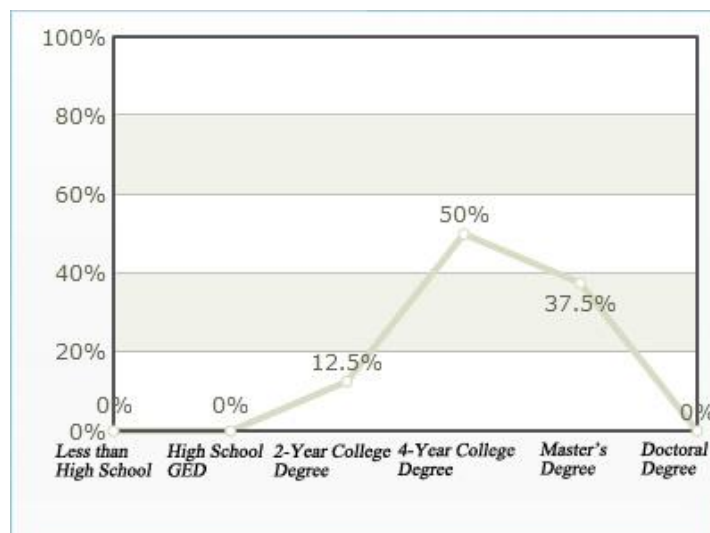
Question 2 Age



Of the 161 respondents, 37.5% were male while 62.5% were female. The age group is primarily 21-25. One reason for this age skew is the active users of social media are teenagers and younger generations so that they would have greater response to an online survey.

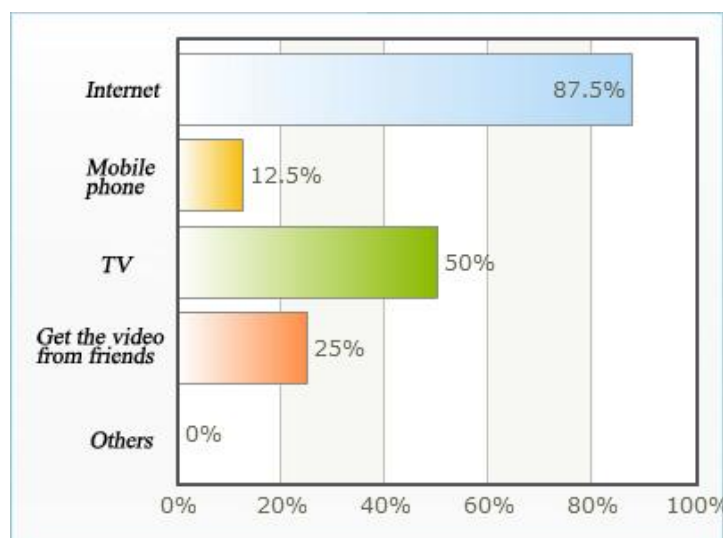
The main consumer group for TV programs is women, so they would pay more attention to the TV programming and respond related surveys.

Question 3 What is the highest level of education you have completed?



As the results show, participants with higher education have a higher acceptance of foreign television programs. Most have a bachelor's degree and some of them have advanced degrees.

Question 4 Have you ever watched any foreign TV program?



According to the results, all of the participants had watched a foreign program and 87.5% watched the programs from video websites, such as Youku, Tudou and Iqiyi, which include network and user-generated content. 50% of the respondents watched foreign programs on TV; these programs were imported and broadcast by TV stations under the supervision of the State Administration of Radio, Film and Television

(SARFT) in China. In addition to traditional distribution methods, some consumers used unauthorized ground satellites to receive overseas television programs and channels; however, this illegal action breaks the "satellite television ground receiving facilities management rule" and other regulations. In addition, 25% of respondents got programs from friends.

Questions 6 Where are your favorite shows produced originally? (Multiple choice)

Questions 7 What type of foreign TV programs do you usually watch? (Multiple choice)

Questions 8 Which shows do you like to watch? (Multiple choice)

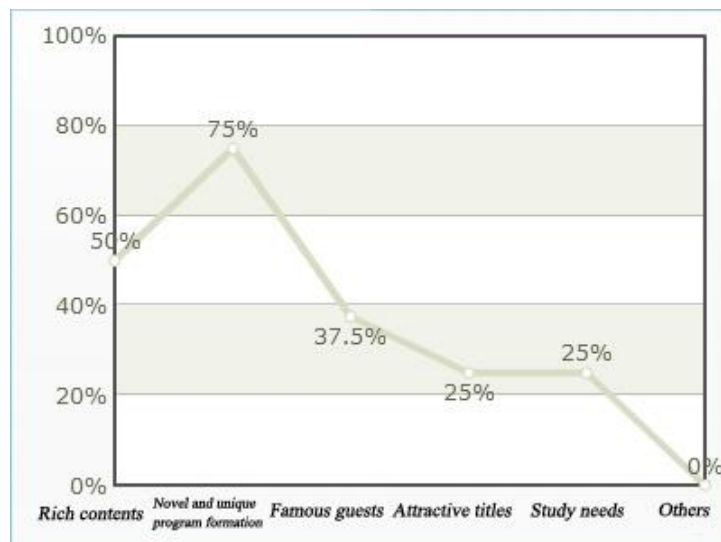
Questions 9 What kind of program do you wish to watch (content)? (Multiple choice)



Questions 6, 7, 8 and 9 tested the popularity of programs' genres and demand preference. According to the results, participants preferred shows from the US, Japan

and South Korea. Based on the survey, the favorite genres are drama, reality, and movies. The most popular formats are talk, cooking, outdoor gaming as well as dating. Representative programs include The Oprah Winfrey Show, America's Got Talent, 2 Days & 1 Night and We Got Married.

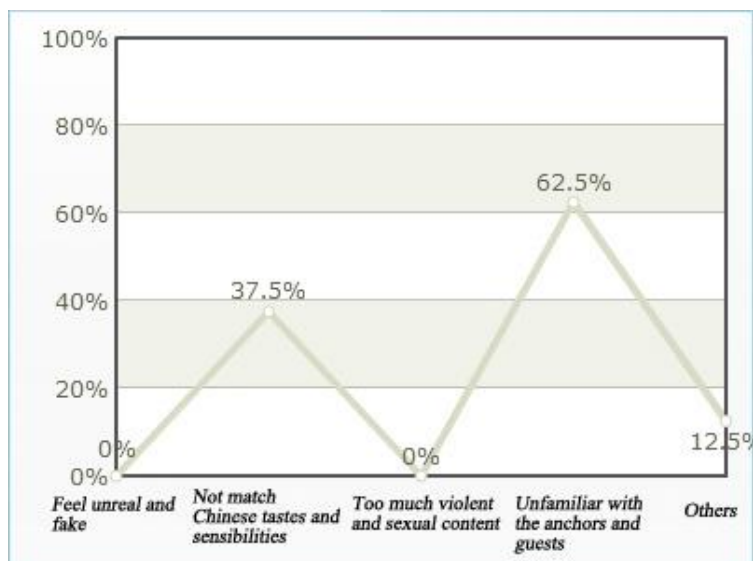
Question 10 Why do you like to watch foreign TV programs? (Multiple choice)



Why viewers choose to watch foreign TV programs is matter of concern to media researchers. Based on the survey results, 75% of participants chose to watch foreign TV programs because of the novel and unique program characteristics; 50% were attracted by rich content, 37.5% of participants liked the celebrity guests. Other reasons are language learning needs and interesting titles.

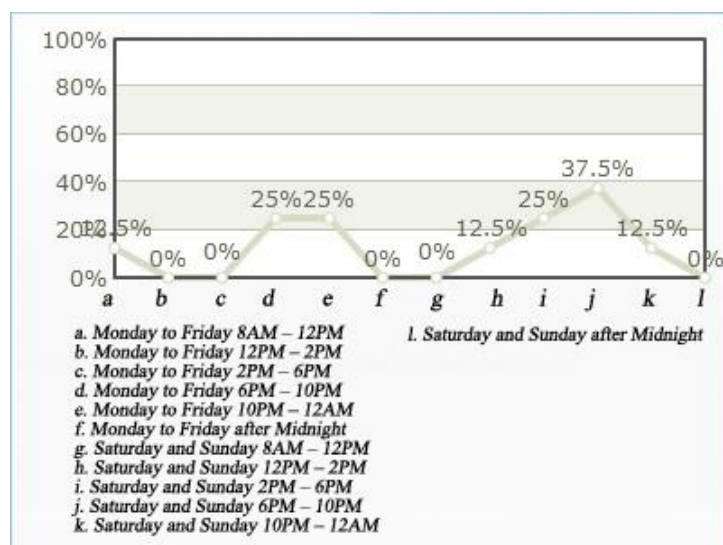
Question 11 Which of the following disappoint you when you watch foreign programs?

(Multiple choice)



Two reasons address audience acceptance; 62.5% of participants would not like to watch a foreign program with unfamiliar anchors and guests. 37.5% of participants thought some shows were not in sync with Chinese tastes and sensibilities.

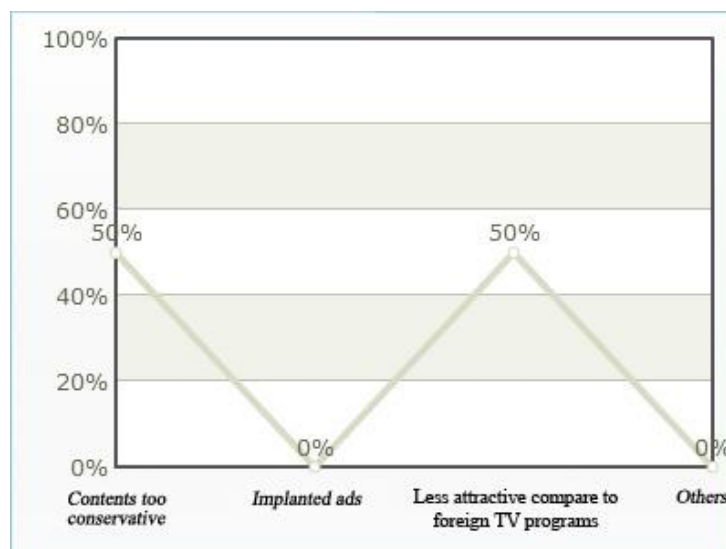
Question 12 When do you usually watch foreign TV programs? (Multiple choice)



This question was designed to investigate audiences' viewing habits. The topic addresses the time of day that people view. As the results show, nearly 37.5% of respondents watch foreign TV from 6PM – 10PM on Saturdays and Sundays; this is also the peak time to watch TV on weekends.

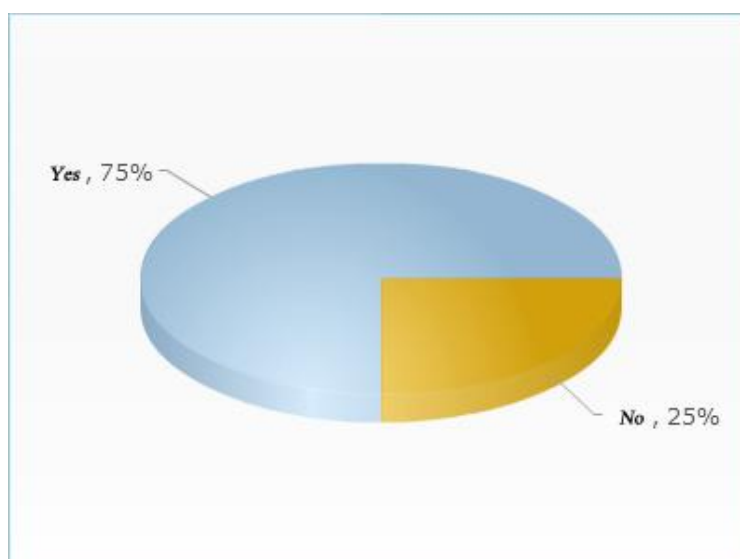
Question 13 Why don't you watch domestic TV programs during the same time

periods?



Question 13 explored why people wouldn't watch domestic TV programs during the same time periods as above. From the chart, it is clear that the factors most often chosen are that people lose their interests in domestic TV because program content is too conservative and less attractive than foreign TV programs.

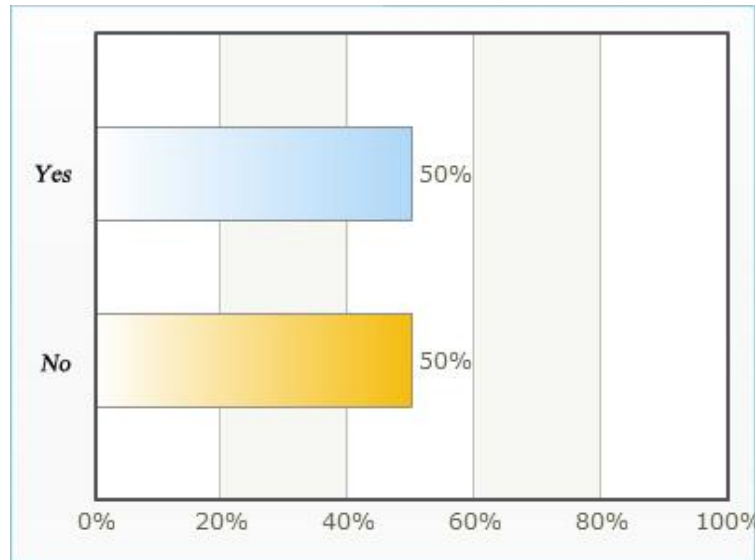
Question 14 Will you keep watching the following episodes after the premiere?



Question 14 was designed to find out the consistency of viewing habits. 75% of participants indicated that they will keep watching the following episodes after the

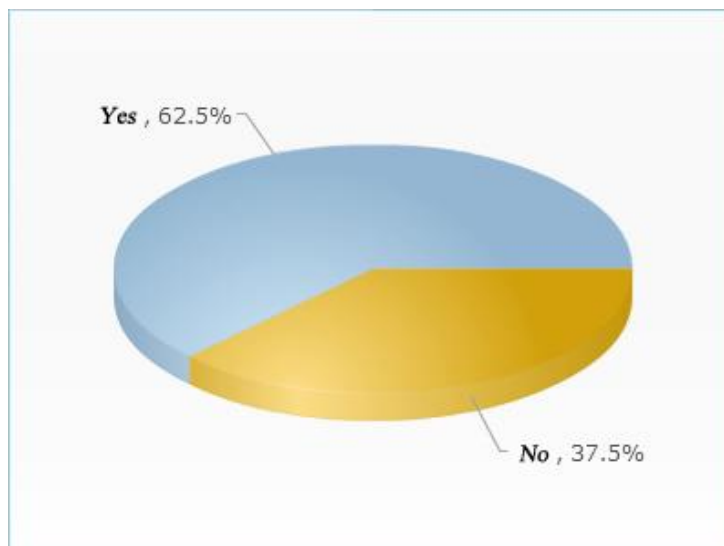
premiere.

Question 15 Have you ever been Binge-Watched TV? (For foreign programs)



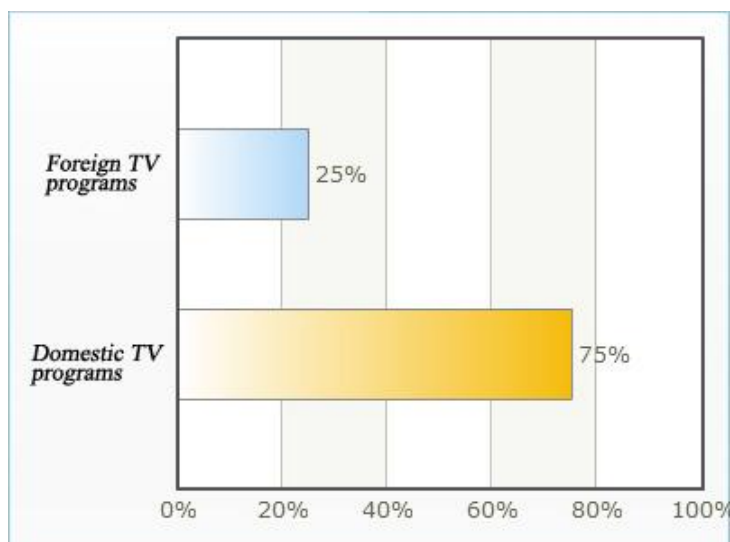
Half of the participants agreed that they have ever binge-watched (“watched (multiple videos, episodes of a TV show, etc.) in one sitting or over a short period of time”) TV for foreign programs. Today, more and more video websites provide online media services to satisfy the audiences’ needs for binge-watching. For example, Youku, a video portal in China, similar to Netflix, allows viewers to easily find the full seasons of TV shows online.

Question 16 Would you like to pay for streaming live TV?



62.5% of the survey participants would pay for streaming live TV. Most people chose to pay for their streaming TV online because of government regulations; there are strict limitations on broadcasting foreign TV shows on screen, both on the quantity and content. In most cases, the only legal way to watch a favorite foreign TV program is to watch online and pay for it. Some video portals provide on-demand Internet streaming media services for their customers; once they subscribe, they are able to watch more than 100 foreign TV programs online, including TV dramas, reality shows, and musical performances.

Question 17 Which do you prefer to watch?



Though the survey's results demonstrate the popularity of foreign TV programs among Chinese audiences and indicate an interest in foreign programs, the audiences in China would like to watch domestic TV programs instinctively. Most of them have a traditional appetite for domestic TV programs. As a result, 75% preferred to watch domestic TV programs, even some very local TV programs.

Further Discussion from the Results

According to an analysis of the survey data, there is a general idea of the current acceptance of foreign television programs in China. What are the attractions of imported TV shows? How would audiences' thoughts and desires affect the importation of foreign TV programs? By using SWOT analysis, the following can be concluded (Table 1):

Table 1

SWOT Analysis of how people think and feel about the foreign television programs

| | |
|---|--|
| <p>Strength:</p> <p>Attraction to youth and women audiences</p> <p>Higher educated viewers</p> <p>Rich content</p> <p>Novel and unique program characteristics</p> | <p>Weakness:</p> <p>Unfamiliar anchors and guests</p> <p>Programs not in sync with Chinese tastes and sensibilities</p> |
| <p>Opportunity:</p> <p>Other platforms</p> <p>Foreign culture</p> | <p>Threat:</p> <p>Competition</p> <p>Cost</p> <p>Censorship and limitations</p> |

CHAPTER 5: DISCUSSION

Introduction

It is less expensive to acquire and adapt rights than to develop something from scratch. In China, many industries sought international business opportunities, including the networks, which were also searching internationally for ideas and good programming. With good quality production around the world, why not bring it to China? What is the position of the government? How do media companies deal with the conflicts of censorship and market demand? (Zhou, 2008)

Discussion

There are five factors which affect the demand for the importation of foreign TV programs. They are; political issues, market needs, government regulations, price issues and demand preferences.

1. International political, financial, and diplomatic circumstance

According to Straubhaar, the international flow of television programs changes with the relations of interdependent countries, which also cause the asymmetrical interdependence of economic, politic and culture. This assertion has been confirmed in the Chinese TV market. (Straubhaar, 1991)

The importation of foreign programming has been affected by political and diplomatic factors. For example, at one time, the importation of Japanese TV series' in

mainland China was strictly limited due to sensitivities surrounding Japan's role in World War II. As geographic neighbors, China and South Korea have maintained close communication for thousands of years and share many cultural roots. With increasingly economic and cultural exchanges with South Korea, Korean television programs have taken a significant proportion of total television program imports. After the normalization of diplomatic relations with South Korea in 1992, China introduced the first Korean drama. (Zhou, 2008)

2. The scale of the domestic media industry

Established in 1958, China's television broadcasting industry underwent several extensive market reforms, and a series of market mechanisms and regulations had been implemented. Today, China's television channels can be classified into four categories - National Channels (CCTV), Provincial Satellite TV Channels (Hunan Satellite Channel), Provincial Channels and Local Channels.

According to the Statistical Bulletin 2010 from SARFT, there are 227 radio stations, 360 television stations, 2120 radio – television stations, and 44 educational television stations in China. In addition, there are a total of 187.3 million cable television subscribers, and 88 million digital cable TV subscribers. The television broadcasting coverage rate is 97.6%. Annual productions are 436 dramas and 14,685 episodes of TV series, 221,456 minutes of animation, 526 movies, and 95 Others (Including science and education programs, documentaries, animation and special movies).

(SARFT, 2010)

In China, television broadcasting is government-oriented (non-commercial) and controlled by China Central Television (CCTV), which owns 45 program channels. CCTV employs approximately 10,000 people and has annual revenue of \$160,000 USD, operating under the dual supervision of the Propaganda Department, which is ultimately responsible for media content, and the State Administration of Radio, Film, and Television, which oversees operations. The network's principal directors and officers are appointed by the State. (Xue, 2009)

CCTV is the most powerful and prolific television programs producer, producing its own news programs which are broadcast three times daily. It also has a monopoly on the purchase of programming from overseas. “All local stations are required to carry CCTV's 7 pm main news broadcast; an internal CCTV survey indicates that nearly 500 million people countrywide regularly watch this program”. (Xue, 2009)

Even though CCTV is the most powerful network in mainland China, it has only a 30% audience share nationwide, demonstrating how Chinese viewers are inclined to watch local TV programs. Since China has a massive audience, it is difficult to satisfy the audience's unique preferences; local programs or even international programs might hardly satisfy the needs of such a wide public. (Xue, 2009)

In 2006, the television industry reached a new milestone by speeding up the transformation to a digital TV standard. “As a replacement to the analog system, China’s terrestrial digital TV standard was coded GB 20600-2006 in August and became a mandatory standard for Chinese broadcasters in August 2007”. (Xue, 2009)

With the development and expansion of the digital TV industry, network operators, equipment providers, content providers and digital TV users are increasingly becoming key players in this growing industry. The digitalization of cable TV in China maintained a stable and relatively rapid development. “By the end of 2006, there were about 10 million digital TV users across the country – an increase of 218% from the previous year. Revenue from subscription digital TV increased by 60% from a year ago, reaching \$ 65.38 million in 2006”. (SARTF, 2007)

Meanwhile, Internet Protocol TV (IPTV) has not experienced rapid development in China. Some companies have received IPTV licenses, such as Shanghai Media Group (SMG), China Central Television International (CCTV), China Radio International (CRI) and Nanfang Broadcast Media (NBM). “Despite forecasts of a strong growth within the TV sector, there was a slowdown in the IPTV industry due to the lack of a sound business model. By the end of 2007, there were approximately 900,000 subscribers, short of the predicted 1.3 million”. (Anonymous, 2007)

“Nevertheless, to stay competitive in the face of IPTV’s increasing popularity, cable

TV network companies in China began to push for further development in providing digital TV services while cable TV operators embarked on bi-directional network (an intermediate network has two channels, one is for download and the other is for upload) reconstruction to meet up with digital TV services". (Hu, 2007)

3. Government Regulations

Television programming is not only a commodity that is widely circulated and exchanged, but also has an entertainment function and socio-cultural identity. It has a profound impact on people's thinking, value and behavior. When importing and broadcasting foreign programs, the government will always interfere and correct the programming regardless of the market mechanism. The programming process is influenced by Chinese culture, cultural diversity and national identity. Government regulations have a direct impact on the import dynamics and amount of overseas programs. For example, China's television broadcasters have been limited in the number of imported series they can show, the government has announced, as China continues to try to weaken foreign cultural influence. (Straubhaar, 1991)

Since September 1, 2006, the Chinese government has banned foreign-produced animation shown between the hours of 5:00 and 8:00 pm on state-run television channels to protect the struggling Chinese animation industry. (SARFT, 2007)

On April, 26th 2014, SARFT decided that several foreign TV programs were not

appropriate for viewing, such as “The Big Bang Theory”, “The Good Wife”, “NCIS” and “The Practice”. The reason for banning these shows is not copyright, but policy issues. TV Sohu (a Chinese On-demand internet streaming media provider) made an announcement last month, stating “We can’t provide these shows due to the policy reasons”. Reasons for this policy were not provided. (Zhang, 2014)

4. The price of imported programs

During trade activities, demand is inversely associated with price. This phenomenon also exists in the international trade of television programs. For example, in 2010, television programs from the United States accounted for 31.6% of China's total TV imports, down from 38% in the late 1990s (1997~1999). There was a slight decrease in the proportion of U.S. programs imported in the early 21st century due to price fluctuations. (Zhou, 2008)

There are several reasons that China is attracted to U.S. programs, primarily due to low prices. These low prices are due to the U.S. syndicated production system. Moreover, lower prices made U.S. programs highly competitive in the marketplace. Due to economic considerations, television stations prefer to purchase films and television programs from the United States. Other countries would have the similar demand and choices when they import programs. (Zhou, 2008)

A good example of how price affects demand was in the late 1990s, when the price

of sitcoms increased; the result was a decline in the importation of programs of this genre. (Zhou, 2008)

5. Genres of programs and demand preferences

Factors affecting the import of foreign programs are complex; in addition to price, quality and cultural proximity, demand preferences also have effects on demand. For example, Chinese TV importers prefer American TV series because of price. Chinese TV stations show a preference for Japanese animation product for cultural proximity. BBC training programs, French feature films and German football games have gradually gained favor among Chinese distributors and audiences.

In summary, according to the Statistics on Imported TV Programs in China from 2008 to 2011, Chinese TV programmers have a preference for foreign television dramas and comedies. (SARFT, 2012)

Limitations

Some data are from government announcements, thus there is no way to confirm. Moreover, since the study was done in the US, face to face interviews were not available from media staff or audiences, so the survey's participants were internet users in China. Finally, the data collection continued for 6 weeks. It was sufficient to see the trends in the results, but a longer period of time might bring increased validity.

Conclusion

The demand for foreign television programs in China fluctuates year to year. Considering so many uncertainties, it is difficult to predict the quantity demanded in the future. When it comes to the international flow of television programs, policy factors are greater than market factors, thus an announcement, such as a ban on web streaming of several popular foreign shows, would change the situation.

Among the five factors above, government regulations have the strongest effect on import demand. China's television broadcasters have been limited in the number of imported series they can show under several new rules, so the demand might decline in the coming years.

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APPENDIX A

Questionnaire on how people think and feel about the foreign television programs

For the purpose of a good research on how do you think and feel about the foreign television programs and your attitude about importing TV programs we kindly ask you spare a few minutes to finish this questionnaire. Anonymity will be employed in this questionnaire. This is for a student thesis research of Drexel University. Your personal information will be well protected and not be release in any form. Please choose carefully. Thank you for your support!

Effective responses: 161

1. Gender

Male

Female

2. Age

Under 20

21-25

26-30

31-41

41-50

3. What is the highest level of education you have completed?

Less than High School

High School / GED

2-Year College Degree (Associates)

4-Year College Degree (BA, BS)

Master's Degree

Doctoral Degree

4. Have you ever watched any foreign TV program?

Yes

No

5. How do you watch a foreign TV program? (Multiple choice)

Internet

Mobile phone

TV

Get the video from friends

Others _____ (Please fill out a reason)

6. Where are your favorite shows produced originally? (Multiple choice)

U.S.

U.K.

Russia

Japan

South Korea

India

Others _____ (Please fill out a reason)

7. What type of foreign TV programs do you usually watch? (Multiple choice)

Drama (TV series)

Sitcom

Reality show

Documentary

Movies (Broadcast on TV)

Others _____ (Please fill out a reason)

8. Which shows do you like to watch? (Multiple choice)

The Oprah Winfrey Show (U.S.)

We Got Married (South Korea)

Take Me Out (U.K.)

Hell's Kitchen (U.S.)

Big Brother (U.S.)

Face Off (U.S.)

Running Man (South Korea)

2 Days & 1 Night (South Korea)

Dancing with the stars (U.S.)

America's Got Talent (U.S.)

Britain's Got Talent (U.K.)

Sesame Street (U.S.)

Animal Planet (U.S.)

Infinite Challenge (South Korea)

Talk Asia (Hong Kong)

The Voice (U.S.)

Others _____ (Please fill out a show's name)

9. What kind of program do you wish to watch (content)? (Multiple choice)

Talk shows

Cooking shows

Musical Performance shows

Outdoor Game shows
 Safari Adventures
 Dating shows
 Others _____ (Please fill out a reason)

10. Why do you like to watch foreign TV programs? (Multiple choice)

Rich contents
 Novel and unique program formation
 Famous guests
 Attractive titles
 Study needs
 Others _____ (Please fill out a reason)

11. Which of the followings disappoint you when you watch foreign programs? (Multiple choice)

Feel unreal and fake
 Not match Chinese tastes and sensibilities
 Too much violent and sexual content
 Unfamiliar with the anchors and guests
 Others _____ (Please fill out a reason)

12. When do you usually watch foreign TV programs? (Multiple choice)

Monday to Friday 8AM – 12PM
 Monday to Friday 12PM – 2PM
 Monday to Friday 2PM – 6PM
 Monday to Friday 6PM – 10PM
 Monday to Friday 10PM – 12AM
 Monday to Friday after Midnight
 Saturday and Sunday 8AM – 12PM
 Saturday and Sunday 12PM – 2PM
 Saturday and Sunday 2PM – 6PM
 Saturday and Sunday 6PM – 10PM
 Saturday and Sunday 10PM – 12AM
 Saturday and Sunday after Midnight

13. Why don't you watch domestic TV programs during the same time periods?

Contents too conservative
 Implanted ads
 Less attractive compare to foreign TV programs
 Others _____ (Please fill out a reason)

14. Will you keep watching the following episodes after the premiere?

Yes
 No

15. Have you ever been Binge-Watching TV? (For foreign programs)

Yes

No

16. Would you like to pay for streaming live TV?

Yes

No

17. Which one do you prefer to watch?

Domestic TV programs

Foreign TV programs

18. What would you say the differences between domestic programs and foreign programs? (Short answer)
