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Larissa Hjorth, Olivia Khoo

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Michael Keane, Elaine Jing Zhao

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Part V

Creative industries: new producers, performativity and production paradigms

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TV or not TV? Re-imagining screen content in China

Michael Keane and Elaine Jing Zhao

In the People's Republic of China television is a dynamic industry, growing ever more profitable by the day. With a potential viewing population of “over two billion eyes” (Zhu 2013), it would seem that the medium has no obvious limits to growth. Yet fewer people are watching television in the traditional living room mode. Moreover, audiences are less inclined to watch television during prime time.

If people's reception habits have changed so dramatically, how is this impacting on content, its production and delivery mode? Furthermore, what does this mean for the way that the television market works? To answer these questions it is necessary to reframe our understanding of television content and audiences, not just in China but globally. We need to look at what television was, what it is now, and what it might be like in the future. Certainly the technologies of satellite and wireless reception have changed perceptions of the medium's ubiquity, allowing content to be accessible to distant audiences. The term “tele-vision,” originally coined to depict the technology of sending moving images over telegraph wires to people in living rooms, is arguably anachronistic, as is the Chinese translation *dianshi* (literally “electric seeing”).

In this chapter we examine the convergence of traditional broadcasting and new media in China. We begin with some brief background on television in China in order to illustrate the changes that have been wrought by marketization and technological change. The desire to modernize China's communication system has resulted in a greater degree of political latitude towards new online media companies; these companies are less constrained by the administrative boundaries that pertain to terrestrial broadcasters; moreover their “creative” personnel are less conditioned by traditional ways of imagining content. Yet the challenges facing the new media companies are of a different order: should they form alliances with traditional media or forge a new frontier of content generation?

Our brief background on broadcast television leads us to the advent of satellite television and the ways that satellite channels have looked to initiate brand programming and establish brand identities. The idea of branded channels is explored in the example of Henan Satellite Television, which has identified its offerings as being “cultural” in contrast to the fierce competition from talent and variety shows. In passing we observe the role played by format television, which has introduced new ways of thinking about the relationship between content and audiences, particularly as new celebrity-based formats take advantage of the affordances of new media—including

apps that enhance audience engagement and mobile devices that allow content to be viewed (and re-viewed) anytime. With formats increasing the potential for audiences to participate, the entry of online media companies into the production of content further disrupts the dominance of traditional media.

In the final section we illustrate two examples of development that show the integration of technology and culture; the first is an IPTV (Internet Protocol Television) service in Shanghai called BesTV and the second, Mango TV, a website and “over the top” (OTT) subscription service operating from Hunan Province. In the case of IPTV we note the arrival of an alternative technological platform with links to China’s second largest media group. BesTV runs on a business model based on advertising and user payment. On the other hand, Mango TV is a website and OTT subscription service offering ad-supported on demand streaming videos of TV shows, movies, as well as short form online dramas called “webisodes,” and behind-the-scenes footage from Hunan TV and other content providers.

Background: the revolution will be televised

The first broadcast of a television program in China took place on May 1, 1958 in Beijing. Television’s function was to propagate national unity, to educate people in the lessons of history, and above all to instill moral lessons. Audiences were an undifferentiated mass, known as the “people.” By 1985, as China edged closer towards becoming a “socialist market economy” it was estimated that ninety-five percent of all urban families owned at least one television (Huang 1994). For people starved of information and curious about the outside world television was a great blessing.

The blessings bestowed by television continued in the 1980s and 1990s; more programs were made, serial drama became the main form of family entertainment, and foreign programming—together with ideas about capitalism—found their way into schedules (see Keane 2015). Despite restrictions on content and genres, the new technologies of broadcasting provided greater access: firstly cable and satellite, and later digital television, smart TV and Internet TV. In the wake of these technological enhancements viewers’ understanding of the role of television in China has altered significantly. In the past decade programming genres have changed, international formats have been adopted, and audiences have become sophisticated. Yet the words of the Canadian media scholar Marshall McLuhan ring true. Writing in an era predating the Internet, blogs, and Facebook, McLuhan announced that the “medium is the message” (McLuhan 1967), implying that characteristics of a particular medium, for instance television, are more significant than the content carried.

What are the characteristics of the medium of television today? Where, when, and how are Chinese people watching TV? What are they accessing? In the mid-1990s, despite a wave of commercial reforms in the media, the Chinese television industry differed from its international counterparts in one important way. All television stations were state-owned: with this came a responsibility to disseminate propaganda. Although stations competed for viewers, there was no identifiable industry policy. In 2001, the term “industry” (*chanye*) began to be widely used to describe the commercialization of China’s culture and media (see Keane 2013, 2015). Today the differences, aside from language, are less obvious.

Much of this similarity has to do with changing international business models. Television during most of the twentieth century was a very different medium from cinema: its industrial logic was predicated on advertising. In most international media environments well-made professional content attracted large audiences and increased profits for producers, investors and originators. This content business model has not changed. Terrestrial stations still dominate programming acquisition and success is still predicated on ratings. Globally, however, the media industry has

witnessed the impact of convergent technologies over the past two decades. We can now differentiate between “network television” and “networked television.” Network television refers to an era dominated by the big commercial networks, when producing hit shows was the primary source of profitability.

Networked television creates a bridge with new media. Enhanced connectivity made possible by convergence impacts upon the abovementioned model of television economics that was underpinned by agencies whose role was to deliver ratings numbers to television executives. The main change, however, is that the consumption of television is no longer tied to prime time. According to Holt and Sanson: “The extension of television entertainment content across screens and platforms, not to mention a socially networked viewership, has again altered textual practices and expanded the space and time devoted to television consumption” (Holt and Sanson 2014, 4). Echoing this transition Michael Curtin uses the term “matrix era” to describe a proliferation of “interactive exchanges, multiple sites of productivity, and diverse modes of interpretation and use” (2009, 13).

Television is more than ever about screens and users. Networked television includes businesses that own infrastructure that enables video content to be pushed from a single point to a large audience (Cunningham and Silver 2014). Multi-channel platforms are providing opportunities for aspiring producers, hopeful of making their ideas accessible to different audiences. Broadband Internet and digital television are widespread as is Internet Protocol Television (IPTV), which allows access to television services via the Internet. Moreover, the advent of digital television has spelt the end of the analog dinosaurs, or has at least disrupted their business models. Television producers have to attend to new challenges coming from “born-online” TV-like companies including YouTube/Google, Amazon, Apple TV and Yahoo. Cross-platform delivery strategies and online marketing have become imperative to the survival of commercial broadcasters.

In China where a large slate of programming is commissioned to please officials, usually historical serials and documentaries, the changes are significant. Despite the truism that television in China now looks a lot like television elsewhere, there is unprecedented change in the way that it is delivered to audiences, which in turn impacts on the commissioning of content. The rapid expansion of digital media is where we see the accelerated evolution of Chinese television. Digitization enables the fulfilment of numerous latent consumer needs in ways that the state-owned traditional media platforms could not offer. As a result, younger audiences who spend little or no time “watching the box” in the living room have adopted digital media.

According to a comparative study of several countries conducted in 2012, online content on TV is viewed most in China—possibly due to consumer interest in viewing foreign programs that may not be available via traditional TV platforms.¹ Evidently fewer people are viewing programs on set screens in their living rooms in “prime time.” Data shows that 10.8 percent of persons born in the 1980s watch only television screens (Cui 2013, 304). Most viewers, except for those born in the 1950s and 1960s, are accessing content on TV-pads, iPads, smart phones, digital recording devices, and through computer terminals. Many Chinese are consuming television-like content at times that suit them rather than during scheduled broadcast times.

As audiences have become more fragmented and selective the Chinese television industry has had to reconsider its mode of operation. Format television has played a major role in changing the landscape, bringing international ideas and skills though the licensing of talent and reality shows (see Keane 2015 for a discussion). Format TV, with its penchant for mixing celebrity and “wanna-be celebrity” in turn offers tie-ins with the emerging online companies. The new players in the Chinese television market have names like Youku-Tudou, Sohu, Baidu, IQiYi, LeTV, BesTV, PPS and PPTV. While these names may be unfamiliar much of their content is produced in the

same way that characterizes “old TV.” As they evolve and stake out their positions traditional incumbents, media institutions, TV channels, production bases and studios are being impacted.

From regional networks to national distribution: the role of satellite TV

Before examining some of these players, it is worth outlining the landscape of the television industry in China. The principal “network” players in China are China Central Television (CCTV), provincial stations (e.g., Guangdong Television) and municipal stations (e.g., Guangzhou Television). The stations are nested within media groups or conglomerates that are intended to be the equivalent of large international players. Each province, and some of the large municipalities, has a media group made up of radio, television and print. Administratively and technologically provincial terrestrial television channels cannot operate at a national level. Indeed, their mandate is to broadcast to their own province and not beyond. Provincial terrestrial channels have seen their share of the television advertising market slipping slightly in recent years and this is related to the changes in satellite television competition. Each media group is allowed one satellite channel with national reach. The exception is Beijing where CCTV has 17 satellite channels and Beijing Television (BTV) two.²

Coincident with the conglomeration of networks in the late 1990s producers of television began to diversify by creating branded programs, later extending these to branded channels. The need for brands was an inevitable consequence of a glut of channels and an abundance of look-alike offerings. However, differentiation came up against the widespread practice of copycatting, that is, once a channel came up with something different it was only a matter of time before its competitors would clone their own “version.” Because it takes a while for a brand program to establish itself in the market the practice of copycatting conspired against the development of new ideas.

However, despite the problem of duplication competition for hearts and minds among satellite channels inevitably led to brand differentiation. As Wanning Sun writes:

Voting with their remote controls Chinese viewers may now go to Hunan Satellite TV for entertainment and fashion, Jiangsu Satellite TV for “touchy feely” programs (*qinggan Zhongguo*), Anhui Satellite TV (dubbed “China’s mega supermarket for television serials”) for dramas, Jiangxi Satellite TV for legends and folktales (*gushi Zhongguo*—narrative China), Hainan Satellite TV for tourism, and Chongqing Satellite TV for history and culture.

(2013, 15)

Another example of an innovative yet traditional approach is Henan Satellite Television. To establish its brand positioning among fellow provincial satellite stations, Henan Satellite TV adopted “culture” as its point of competitive advantage. In 2011 it came up with the slogan of “cultural TV: educate through entertainment” (*wenhua weishi, yujiaoyu le*). This slogan obviously has appeal to China’s regulators, echoing the logic of combining the educational function of TV as mass media, which has a long tradition in China, and the appeal of entertainment which is widely embraced by today’s audiences. Since mid-2013, Henan TV has made a number of strategic moves around cultural positioning with the aim of “carrying forward civilization” (*chuancheng wenming*). It collaborated with the online video sharing platform iQiyi in launching a new program *Hero of Chinese Characters* (*hanzi yingxiong*), ostensibly with the aim of bringing people’s attention back to the written language and the profound culture behind it in an era of typing

and texting. Such positioning around Chinese culture has successfully differentiated the program from the glut of singing and dancing competitions currently on the small screen.

With contestants aged between seven and 17 years old, the program is an apparent attempt at attracting the youth market, a segment that had previously evaded Henan Satellite TV. Of course, the cultural positioning has an appeal to parents concerned with the “excessive entertainment” on screen in recent years. The inter-generational interaction is demonstrated during production, where cameras target parents backstage or in the audience, nervously watching the game or enthusiastically showing their support for the contestants. At the press conference for the launch of the program, when asked the difference between *Hero of Chinese Characters* and *The Dictionary of Happiness* (*kaixin cidian*) and *A Special Six-Plus-One-Day Performance* (*feichang liu jiayi*), two similar Q&A reality game shows broadcast on CCTV, producer Ma Dong explained the main purpose of *Hero of Chinese Characters* is to tap into youth potential and build a platform for parent-child interaction.

Apart from leading the production team, Ma hosts the program. Significantly, he became the chief content officer of iQiyi after quitting his previous role at CCTV as a program host. Such boundary-crossing experience suggests that Ma has insights into both “traditional” TV market and the new frontiers of online screen culture.

The collaboration affords a multiple-screen experience for the audience. After screening on Henan Satellite TV, each episode is distributed on iQiyi, the exclusive online platform for the program with a “window” of about 1.5 hours. iQiyi also supports viewing on mobile devices. Audiences can view various versions: outtakes, uncut versions and mini versions on online and mobile devices. These features allow young people to watch the content of their choice at their own pace and at a time and place of their convenience. In a mobile application launched in association with the program, players can play the game by writing characters based on the questions on the handwriting panel. They can also use the mobile app to interact with the program at the time of broadcasting. Like a lot of game shows there is a competitive element. The top-ranking player emerging from the mobile platform has an opportunity to compete with players on TV for the championship (*zhuangyuan*). The app had received 1.2 million downloads by the end of the first season (*‘Final of Hanzi yingxiong’ 2013*). Such dynamics between TV and online platforms appeal particularly to young people, who are on their mobile devices almost all the time.

Apart from the non-linear multiple screen experience, the use of cultural celebrities also helps to attract the youth market. Three cultural celebrities joined Ma as the panel of guests, including Yu Dan, a scholar and professor at Beijing Normal University, well known for her populist explanations of the ancient texts of Confucius and Zhuangzi; Gao Xiaosong, a musician and pop icon; and Zhang Yiwu, a professor of Chinese language at Peking University and well-known cultural critic.

Overall, the cultural positioning, the intergenerational twist, the non-linear multiple-screen experience and the use of cultural celebrities have contributed to positive audience reception. The success of the first season of *Hero of Chinese Characters* is demonstrated in ratings, taking third place in nationwide ratings, second only to the *Voice of China* (*Zhongguo haoshengyin*) and *Happy Boy* (*kuaijie nansheng*), two immensely popular singing competitions launched by Zhejiang Satellite TV and Hunan Satellite TV respectively (*‘Hanzi yingxiong’ 2013*).

The success of *Hero of Chinese Characters* has led Henan Satellite TV to launch a sister program *Hero of Chinese Idioms* (*chengyu yingxiong*). It has replicated the strategy of using cultural celebrities and facilitating multiple-screen experience through mobile games to attract a young audience. The “you draw, I guess” format of the competition involves teams of two people, three cultural experts as the panel of guests and the former CCTV talk show host Cui Yongyuan who hosts the program. Among the panel of experts is the Taiwanese cartoonist and winner of Taiwan’s

Golden Comic Award Tsai Chih-chung, who is well known for popularising the works of Chinese ancient philosophers including *Laozi*, *Liezi* and *Zhuangzi* through use of plain language and humorous cartoons. In the program, Tsai provides advice to contestants on how to use drawings of Chinese traditional culture that can be embedded in the idioms. The appearance of the Taiwanese Tsai in the program can be seen as a footnote to the creative migration of East Asian cultural celebrities to “play to the world’s biggest audience” (Curtin 2007).

The collaboration between Henan Satellite TV and iQiyi is a step beyond the usual copyright transaction model observed between TV stations and online video platforms whereby the latter purchases ready-made content from the former. It involves an equal share of investment by each party in addition to co-design and co-production. For iQiyi the collaboration with a TV station is a move to enhance its in-house production strategy, a response to the copyright war waged among online video platforms and a demonstration of its ambition to become a content provider (Zhao and Keane 2013; Zhao 2014). For Henan Satellite TV, the collaboration with the new-generation screen platform assists it in winning over young audiences by appealing to their viewing habits.

BesTV

Whereas the cultural brand positioning is a response to competition among satellite channels, IPTV has followed a different development path. Satellite channels are accessible in a number of ways, primarily as part of a cable TV package. IPTV is contingent on bandwidth and is therefore more local. Whereas conventional television is not affected by how many people are watching, IPTV (user) experience suffers when a large number of people are collecting their packages of information at the same time. This technical bottleneck means that people who can afford faster broadband are the consumer base. IPTV trials began in 2005, concurrent with digital television and the players in the market were China Telecom and China Netcom.

While telecoms fall under the regulatory control of the MIIT, licenses to produce and distribute television-like content come from the State Administration of Press, Publication, Radio, Film and Television (SAPPRFT), which is a result of the merger between the State Administration of Radio Film and Television (SARFT) and the General Administration of Press and Publication in March 2013. The frontrunner in IPTV was the Shanghai Media Group (SMG). Soon after it received its IPTV license from SARFT it spun off one of its production units into two companies, BesTV, now the leading provider of IPTV in China, and the Shanghai Film Radio and Television Production Ltd (FRTP), which produces event television and provides sets for reality TV shows such as *The Voice of China* (*Zhongguo haoshengyin*).

BesTV has a high profile among the new online media companies that are usurping the dominance of the traditional broadcasters. Its slogan is “from watching TV to using TV.”³ The IPO listed company behind this initiative is BesTV New Media Company Ltd, which also has interests in mobile television, smart television, online video, broadcasting integration, as well as movie, television and multimedia production. Like a number of other new entrants it has established relationships with hardware companies, in this case the Chinese computer giant Lenovo. The expansion into smart TV and cloud TV are strategies to monetize “over-the-top” (OTT) content.⁴ BesTV offers a range of options for consumers willing to pay, from High Definition Digital TV with a buffet of premium content such as the US National Basketball Association (NBA) and the English Premier League (EPL) without advertising, to Standard Definition Digital services with advertising. In hoping to migrate some of its customers from IPTV to OTT, the company offers a smart TV with both functions. Other dedicated services include apps through which viewers can customize their viewing, allowing family members to simultaneously access

programs on tablets and mobile devices, and local community television channels that allow people in the community to receive medical and social security information.

Hunan Satellite TV and Mango TV

If Be\$TV represents the broadband enabled technological interface, Hunan Satellite TV (HSTV) is a case of a traditional broadcaster trying to commercialize its brand in the face of competition from born-online video companies. Hunan Satellite TV is the most well-known entity in the Hunan Broadcasting System: it is also the most successful satellite channel in the Mainland. Established in 1997, it was the first satellite channel to realize the potential of branding, establishing an image of a youth-oriented network willing to try out ideas, even if this meant plundering them from abroad. As the strongest provincial competitor to CCTV, HSTV has often come under attack from Beijing's regulators for its transgressions, namely appealing to youth audiences in a language and style that is notably different from CCTV.

In an interview in 2010, CEO Ouyang Changlin elaborated on the HSTV brand vision, "Our program strategy is grounded on the 'three locks': locking in entertainment, locking in youth, and locking in a national market" (cited in Zhu 2013, 205–206). A key issue, according to Ouyang, is copyright protection. HSTV's own popular programs had fallen victim to copyright violation, the most conspicuous case being Jiangsu Satellite TV's *If You Are the One* (*feicheng wurao*), a copy of the format that HSTV acquired from Fremantle Media. HSTV's most well-known talent show, *Supergirls* (*chaoji nüsheng*), itself a clone of *American Idol*, was cloned by Shanghai's Dragon TV as *My Hero* (*jia you! haonaner*).

Aware of people's changing viewing habits, HSTV has moved to extract more value from its hit shows by embracing new delivery platforms. As early as 2006 Hunan Happy Sunshine Interactive Entertainment Media Co., Ltd (hereafter referred to as Happy Sunshine) was established as a subsidiary of HSTV with the mission of developing value-added new businesses in digital media. According to Vice-President of Happy Sunshine, Yi Keming, the focus is on developing multiple modes of content delivery through new media. As he explained, the new media platforms under the parent company have more resources compared with independent online video platforms, which means there is no need to explore new forms of businesses from the ground up (Yi 2014). As CEO Ouyang Changlin pointed out in an interview, despite the vicissitudes of working in an uncertain media environment, content is still king: "Content innovation is the only way for HSTV to maintain its edge" (in Zhu 2013, 205–206).

The new media strategy includes an online video platform www.hunantv.com and Internet TV, branded as Mango TV under HBS. Following the logic of building its own platforms by leveraging its premium content, Hunan Satellite TV started broadcasting its hit entertainment shows exclusively on www.hunantv.com and stopped licensing copyrights to other online video websites. These hit shows include *Divas Hit the Road* (*huaer yu shaonian*), *X-change* (*bianxingji*) (Season 8), and *Song of Vengeance* (*changzhanji*). Although the television station had previously received a US\$32 (RMB 200) million licensing fee from iQiyi for five of its popular shows (Yi 2014), the management is confident that advertising revenue and subscription fees from users of their own platform will surpass the revenue loss in copyright licensing (Yi 2014).

The strategy of maintaining exclusive rights resulted in a spike in the number of daily unique visitors to Hunan TV's online platform. According to Helen Huang, Happy Sunshine Brand Centre Director, the figure jumped from around 300,000 to a peak of ten million within two months, with a daily average stabilizing at around eight million users (Huang 2014). Originally

a target for the end of 2014, the threshold of ten million was crossed half a year in advance. This spike is a vindication that exclusive rights to quality content can strengthen the potency and brand of a platform, at least for the moment. Although a latecomer to the battlefield of online video distribution, HSTV is quickly catching up.

That being said, the strategy of maintaining exclusive rights is still in its early days. The question remains: will this be a sustainable approach for HSTV claw to back its audience from other online video sites? Whether or not a few hit shows can continue to support the growth of the online platform remains to be seen. The drawing power of these programs has so far resulted in a significant increase in users within a short period of time. Continued production of top quality content will be a key condition for this trend to last. Echoing Ouyang Changlin, content is still king. Despite this truism, user experience is the other half of the success equation. Given its target users have already been watching videos on other online video sites for years, Hunan TV needs to deliver at least acceptable user experience on its own site to maintain its newly gained users. So far this has proved a challenge. An example of the task at hand is the Mango TV mobile app. Current versions of the app received only a two-star rating from users. A review of the comments left by users at the app store shows many complaints on issues including frequent pauses, stutters and image quality. It is worth noting that Happy Sunshine has worked on these issues and things have improved significantly after adopting the strategy of maintaining exclusive rights to its original programs. Obviously, the new media arm of HSTV understands the significance of user experience in maintaining users.

Apart from developing HSTV's own online video platform, Happy Sunshine is advancing its options in the Internet TV business. In collaboration with television manufacturers such as Samsung, Changhong and TCL, it delivers television services on smart TVs with built-in set-top boxes. The partnership with set-top box manufacturers brings over-the-top content to audiences. Television content comes from channels under CCTV, provincial TV stations, and local TV channels under Hunan Broadcasting as well as other genre-specific channels such as cartoons and educational content. Apart from close-to-live broadcasting with a window of 30 minutes, time-shifting features allow users to catch up with the content they have missed. Audiences can also review programs broadcast within the last seven days, on-demand. In addition, the service provides access to a library of around 2000 films.

Conclusion

In this chapter we have provided an overview of changes in the way television is produced, distributed and consumed in China. The Chinese television landscape now looks very different to how it did just a decade ago. However, the rate of change since the mid-2000s has been frenetic and new players are changing the structure of the industry, adding to profitability while at the same time drawing advertising income away from traditional channels. The dominance of traditional networks is challenged by the entry of "networked" online companies not tied to geographical administrative boundaries. These have the advantage of knowing their audience more deeply through the exploitation of big data.

Traditional channels and networks like Henan Satellite TV and Hunan Satellite TV are now impelled to consider online strategies, which entail partnering with new media players in rights acquisition, distribution and production. The entry of IPTV and OTT services further extends the need to acquire new forms of branded content that are amenable to delivery on the devices and networks that now underpin the communication system. Strategic alliances have been brought about by the necessity to comply with international intellectual property frameworks. The willingness of the state to validate these alliances is in stark distinction to the administrative

boundaries that were imposed on traditional media. Thanks to the expansion of these alternative platforms for accessing, viewing and interacting with content, the boundaries have blurred between traditional and new media, in turn changing the experience of watching television. This is TV but not as we used to know it.

Notes

- 1 See PR Web Consumers Viewing More Online Video Content on TVs, NPD DisplaySearch Reports. Available at: <http://www.prweb.com/releases/NPD/DisplaySearch/prweb9829010.htm> (Accessed April 4, 2014).
- 2 Being the national broadcaster CCTV's channels are accessible nationwide. In addition it operates international language channels.
- 3 <http://www.bestv.com.cn/en/>
- 4 OTT refers to delivery of video, audio and other media over the Internet without a multiple system operator being involved in the control or distribution of the content. See http://en.wikipedia.org/wiki/Over-the-top_content

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