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## Research on Changes in Media Industry Format in the Context of Media Convergence: Postprint

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### Abstract

With the advent of a new era, as new technologies are continuously applied and new concepts constantly emerge, “media convergence” has become the point of departure for implementing various innovative development initiatives in the contemporary media industry. Against this backdrop of media convergence, this paper analyzes transformations in the media business landscape from three dimensions: the resource integration and restructuring of traditional media, the dominance of internet-based media in the mainstream market, and the inclination of national policies related to the media industry toward converged media, and proposes specific recommendations for the transformation of present-day media enterprises based on these changes, with the objective of fostering sustainable and healthy development of China’s media industry.

### Full Text

#### Media Industry Structural Changes in the Context of Media Convergence

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**Abstract:** With the advent of the new era, new technologies continue to be applied and new concepts continuously emerge, making “media convergence” the starting point for various innovative development initiatives in today’s media industry. Based on the context of media convergence, this paper analyzes changes in media industry structure from three perspectives: the resource integration and reorganization of traditional media, the dominance of internet-based media in the market, and the national policy tilt toward converged media. It also offers recommendations for the transformation of contemporary media enterprises to promote sustainable and healthy development of China’s media industry.

**Keywords:** media convergence; new technology; media industry structure; representative cases; transformational changes

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The advantages of new media lie in convenience, speed, and timeliness, while traditional media's strengths rest in authority and rigor. On January 25, 2019, during the 12th collective study session of the Political Bureau of the CPC Central Committee, General Secretary Xi Jinping stated that "promoting media convergence and building all-media has become an urgent task before us." How to facilitate the integration of traditional and new media to achieve complementary advantages has been a subject of active exploration by domestic media organizations in recent years. The development of media convergence has also led to updates in media industry structure. Currently, the most noticeable changes in China's media industry structure are threefold: first, the integration and reorganization of traditional media resources, exemplified by the "central kitchen" model; second, the dominance of internet-based media in the market, reflected in media technology intelligence; and third, the policy tilt toward converged media, typified by the development of "county-level media convergence." These changes all stem from the development of media convergence in China and possess distinct epochal characteristics.

## 1. Overview of Media Convergence in China

Since the beginning of the 21st century, the internet has gradually spread and developed in China. During this period, traditional media recognized the value of the internet but, due to technological limitations, could only achieve simple "physical" convergence—namely, launching websites and putting television programs online. This marked the embryonic stage of media convergence in China. Subsequently, as the internet's status gradually elevated, new media based on internet technology gained more users, while traditional media lost a large user base due to outdated technology. At this point, traditional media began seeking integration with new media, striving to achieve mutual complementarity and advantage. Presently, a systematic technological revolution is erupting in China, with intelligent reconstruction occurring across the entire media chain from production to transmission to reception, providing technical support for further media convergence development. Some large Chinese media groups have already achieved an intelligent media convergence pattern of 5G+AI+VR. Media convergence is not a simple technical addition of traditional and new media, but rather a deep integration that encompasses technological convergence, the fusion of unidirectional and bidirectional communication forms, and the inte-

gration of conglomeration and digitalization in the industrial sphere. Media convergence represents the inevitable trend for China's future media industry development, and relevant media institutions and organizations must prioritize the quality of traditional-new media integration and actively respond.

## 2. Changes in Media Industry Structure and Representative Cases

Since the emergence of new media, the media industry market has been committed to integrating new media with traditional media to achieve complementary advantages. After years of exploration, the path to traditional-new media integration has become clear, focusing on organizational structure, technical processes, and development mechanisms.

### 2.1 Resource Integration and Reorganization of Traditional Media: The “Central Kitchen” Model

Under the trend of media convergence, the traditional media industry most urgently needs innovation and transformation. Traditional media has undergone a long development process with well-established internal structures and stable management systems, along with strict content review mechanisms, giving it advantages in rigor and professionalism. However, traditional media's outdated information dissemination methods are no longer compatible with current social development. Under the significant development opportunities brought by “media convergence,” China's traditional media has undertaken resource integration and reorganization, packaging advantageous resources to create a new traditional media operation model that achieves deep integration with new media. The prominent manifestation of this development is the popular “central kitchen” model within the traditional media industry in recent years.

In the media industry, “central kitchen” refers to a multimedia integrated platform that combines multiple functions such as planning, interviewing, editing, and broadcasting. Taking Tianjin's Jin-Yun “Central Kitchen” as an example, it includes a technical work platform, content production management platform, information feedback platform, and data support platform—making it more like a comprehensive large-scale editorial department where all required resources are centrally planned. Frontline journalists complete collection work and transmit content to the “central kitchen,” which then sorts the material and systematically distributes semi-finished content to various departments for “cooking” into diverse “dishes” such as text, images, video, and H5 formats. These “dishes” are then served to audiences through various “restaurants” including websites, newspapers, and client applications. This is the general operational process of the “central kitchen” model.

Currently, the “central kitchen” model has two sub-models in the media industry, each with distinct characteristics. The first type centers on major theme reporting, which the People's Daily employed during its 2015 Two Sessions

coverage. The second sub-model involves merging departments to establish a command center, as seen in Guangzhou Daily Press Group and Nanfang Daily Media Group. Since its introduction to China's traditional media industry, the "central kitchen" model has achieved breakthroughs in workflow, mechanisms, technology, and products, while also generating significant economic benefits. On one hand, it enables self-innovation in planning, collection, editing, and broadcasting. For instance, previously journalists had to conduct differentiated interviews based on subjects and categorize their writing, which was time-consuming and labor-intensive. Under the "central kitchen" model, journalists can focus on targeted information collection and organization, leaving text editing to the back-end platform. Economically, the "central kitchen" model increases traditional media output while reducing per-product costs through "centralized procurement," creating economies of scale for media enterprises.

## 2.2 Internet-Based Media Occupying the Market: Media Enterprises Moving Toward the Internet

Another major transformation in media industry structure under media convergence is that internet-based media have begun to occupy the primary market. Currently, most of China's traditional media are approaching media convergence from the direction of internet technology innovation. Since 2012, the scale of internet media in China's media industry structure has continuously increased, exceeding 65% by 2018. The dominance of internet-based media in the market is a development outcome based on history and focused on technological innovation, with its prominent manifestation being media enterprises' comprehensive shift toward the internet.

On one hand, traditional media are building their own intelligent media communication platforms, such as news apps. In August 2017, Nanjing Press Media Group launched version 2.0 of its Zijinshan News client. This news app uses "big data" and "cloud computing" as its technical core and designs various intelligent content features, providing users with multiple functional services. Zijinshan News vigorously promoted this app in metropolitan areas and university campuses, acquiring nearly 30,000 college student users within a month. Currently, the Zijinshan News app, together with the group's other official Weibo and WeChat accounts, constitutes Nanjing Press Media Group's mobile communication matrix, delivering "first-time core dissemination" value. Beyond news apps, many domestic media enterprises have also begun developing short video and live streaming products. Taking Nanjing's Dragon-Tiger Network as an example, based on its "all-media live collection and release system integration platform," it focuses on live streaming and short video business, with over 100,000 users. Its "Zijinshan News Video" has become the company's key short video brand, maintaining the top influence among news short videos in Jiangsu Province.

On the other hand, many media enterprises are actively building their own new mainstream media groups. For example, Shanghai United Media Group has

formed a “3+2+4” new mainstream media layout: “3” refers to three traditional newspapers; “2” refers to two internet news products, “The Paper” and “Jiemian News” ; and “4” refers to four major internet projects under the group. This new mainstream media platform construction dominated by internet media has allowed enterprises to capture sufficient internet dividends while enabling traditional newspapers to achieve certain development driven by internet media. Moving media enterprise construction closer to the internet is key to mastering modern science and technology communication techniques and establishing a foothold in the “intelligent media” era. By developing various internet news products, media enterprises fully leverage the era advantages of “everything is media, everything is interconnected,” opening up a new pattern for media enterprise construction.

### 2.3 Expanding Media Value Forms: County-Level Media Convergence

In recent years, the state has focused on converged media development and proposed a media convergence strategy. Against this backdrop, relevant national policies concerning media industry development have begun to consciously tilt toward converged media, powerfully expanding media value forms. A prominent 典型案例 is the proposal and practice of the “county-level media convergence” strategy.

On November 14, 2018, the fifth meeting of the Central Committee for Comprehensively Deepening Reform reviewed and adopted the “Guiding Opinions on Strengthening the Construction of County-Level Media Convergence Centers.” Since then, counties nationwide have actively responded to the national call and invested in county-level media convergence construction. The state’s emphasis on county-level media convergence is largely because it serves as the “last mile” for grassroots publicity. Strengthening county-level media convergence construction not only helps mainstream media better fulfill their important role as the “eyes, ears, and voice” of the Party and government but also enhances the influence of county-level media and implements China’s “four-level operation” policy. After years of development, China’s county-level media convergence has formed diverse construction models, currently divided into three types: central media + county-level media convergence, enterprise + county-level media convergence, and multi-government level + county-level media convergence.

County-level media convergence primarily serves two functions. First, government service function. Mainstream media serve as the “eyes, ears, and voice” of the Party and government, bearing the important responsibility of disseminating and interpreting government policies, supervising policy implementation to ensure various policies are truly implemented. County-level media convergence has developed government service functions during its construction, creating various “government services at your fingertips” that truly enable the masses to handle various government affairs without leaving home. Second, public service function. News media take meeting people’s information needs as their mission, making livelihood news a top priority in media coverage. County-level media

convergence actively develops public service functions during construction, committed to solving various problems people encounter in life. For example, the “You Shijie” platform developed by Anji News Group significantly enriches people’s spiritual lives and meets their increasing spiritual and cultural needs. The proposal and practice of county-level media convergence represent an important measure implemented by the state to adapt to the converged media background and also serve as verification of the importance of media convergence. The policy tilt toward converged media will change the problems of declining propaganda value and weakened public opinion guidance capabilities of traditional media, enabling media value forms to develop in a positive direction.

### **3. Implications for Media Enterprise Transformation Under Media Convergence**

Based on the above changes in media industry structure under media convergence, China’s media enterprise transformation and upgrading strategies have been basically implemented, with major media outlets across the country demonstrating a high theoretical understanding of media convergence. Overall, these structural changes offer the following insights for media enterprise transformation.

#### **3.1 Increased Funding and Strategic Support by Category**

To ensure smooth transformation and upgrading of media enterprises in the converged media environment and to build toward a new mainstream media structure, necessary measures must include increased funding. Only with sufficient financial support can subsequent construction work proceed steadily. For small and medium-sized traditional media, relying solely on themselves to increase funding would create significant financial pressure; therefore, they can choose to cooperate with social forces to obtain social capital support. However, merely increasing funding is insufficient. The transformation and upgrading of media enterprises is essentially an economic activity involving costs and benefits. If invested costs fail to generate returns, it will naturally cause economic damage. Therefore, media enterprises must control cost budgets and eliminate high-expenditure, low-income phenomena. To this end, financial departments in media enterprises should emancipate their minds, change original cost expenditure models, reduce low-effect cost consumption, and eliminate capital waste. Additionally, capital management departments should proactively formulate appropriate capital allocation strategies based on current market conditions and adjust them in keeping with the times. Furthermore, government departments need to provide strategic support, such as using new media special funds to support innovative projects and providing fiscal subsidies primarily for traditional newspaper industries.

### 3.2 Accelerated Technology Upgrades and Professional Talent Cultivation

From the transformation initiatives of major media groups mentioned above, high-quality converged media technology is the core element for media enterprise transformation and upgrading. Only with technical guarantees can the construction process of new converged media layouts proceed more smoothly. Technology upgrades require rational technology introduction based on actual development conditions. Additionally, media enterprises can choose strategic cooperation with relevant technology companies to achieve converged media technology upgrades. For example, in November 2019, Yingtian Daily in Jiangxi Province held a strategic cooperation signing ceremony with Xiangxin Technology, announcing the start of strategic cooperation. This move further upgraded Yingtian Daily's converged media technology and applications, elevating its advanced technology and media convergence level to a higher tier. Moreover, media enterprises need to emphasize talent innovation strategies to develop various internet products. Media enterprises must focus on improving employees' comprehensive qualities to enhance their ability to participate in converged media pattern construction. Training departments within media enterprises should actively innovate staff training methods, enriching not only theoretical knowledge but also deepening converged media theory through specific practical activities while teaching various knowledge related to actual converged media work, such as video editing, image production, writing, and photography. Through comprehensive vocational ability cultivation, employees' work capabilities and professional judgment can be enhanced, providing talent support for media enterprise transformation and upgrading.

### 3.3 Integrating Local Characteristics to Change Homogenization

Content homogenization and low user stickiness are problems existing in the development of many media enterprises. To address this issue, media enterprises need to innovate their work concepts when developing internet media platforms and designing relevant news products, trying to incorporate local or enterprise characteristics to change the homogenization phenomenon of internet products in the media industry. To achieve this, media enterprises also need to identify their positioning clearly and conduct comprehensive analysis and grasp of their operational content and market positioning. When conducting market positioning, media enterprises must not only make rational macro layouts but also ensure their designed news products meet the differentiation and hierarchical needs of user groups. It is not easy for media enterprises to create distinctive features in a homogenized environment. Therefore, local media enterprises can choose to integrate local characteristics into new operation models, innovate their thinking, and achieve differentiated construction, thereby changing the homogenization status quo.

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*Note: Figure translations are in progress. See original paper for figures.*

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